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From Pop-Up to Permanent: Market Experimentation and the Experiential Turn in Chinese Consumption

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Abstract. China's consumer market is shifting from transaction-oriented retail toward experiential consumption. Pop-up retail has become mainstream commercial infrastructure, and the debut economy is now a national strategic priority that supports brands as they move from temporary market experiments to a lasting commercial presence. Existing research offers little process-based analysis of this transition under debut-economy policies. Research on consumer experience and management strategy also remains disconnected. Through a multiple-case study of To Summer, On, and Photoism, this article examines how temporary experimentation leads to permanent retail. The analysis identifies feedback-driven, staged progression as the central mechanism. Brands use pop-ups or slow pop-ups as low-cost experiments, gather market signals in actual consumption settings, and assess whether those signals justify further investment in permanent operations. Debut-economy policies lower transition costs and help brands near the investment threshold proceed, while market experimentation remains central to the decision. The article brings together the experience economy, pop-up retail, and the debut economy in a single analytical framework. Its five interrelated theoretical propositions explain the retail innovation pathway from temporary experimentation to permanent stores.

Keywords: pop-up retail, debut economy, market experimentation, experience economy

1. Introduction

Over the past decade, per capita disposable income in China has risen substantially, while the expansion of e-commerce has given consumers an increasingly wide choice of goods. As growth in e-commerce approaches saturation, however, people have begun to place renewed value on the immediacy and experience of shopping, bringing physical commercial spaces such as shopping malls back into focus. Consumers' perceptions of these spaces have changed accordingly. Whereas people once visited malls mainly to purchase satisfactory standardized goods, shopping has increasingly become a way of seeking experiences beyond the act of purchasing goods. China's consumer market has thus undergone a structural shift from transaction-oriented retail toward experiential consumption. As this shift takes place, mall spaces give brands a place to distribute goods and services, meet consumers, and test market responses. Pop-up stores have emerged as a physical retail format within this setting.

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Pop-up stores are temporary retail operations that usually last from a few days to several months. They generate publicity, test new products in real settings, and offer immersive brand experiences that online channels cannot readily reproduce. In China, pop-ups have evolved from a niche marketing tactic into mainstream commercial infrastructure. The debut economy has developed alongside this change. In 2024, the resolution adopted at the third plenary session of the 20th Central Committee of the Communist Party of China called for actively developing the debut economy [1]. The Ministry of Commerce subsequently announced plans to cultivate debut centers and clusters, elevating the debut economy to a national strategic priority in building a unified national market and expanding consumption. Policy initiatives and commercial developments have advanced almost simultaneously as consumption has shifted. Contemporary Chinese consumers, especially Generation Z and the emerging middle class, increasingly place emotional resonance, cultural identification, and social currency above functional utility or price. As consumers place more value on experiences than on owning goods, pop-ups and debut events have become important ways for brands to connect with them, having previously been peripheral marketing attractions.

The transition from pop-up to permanent retail therefore warrants closer analysis. A temporary store lets a brand test a market at low risk before deciding whether to operate there permanently. Debut-economy policies support this transition by reducing frictional costs and encouraging brands to establish a lasting presence in cities.

The cases of To Summer, On, and Photoism allow this article to trace how pop-up retail has developed in China. The analysis brings the market logic and policy conditions governing the move to permanent stores into a theoretical framework for this form of retail innovation.

2. Literature review

2.1. Definitions and characteristics of pop-up retail

Existing research has reached a broad consensus on the definition and characteristics of pop-up stores as a retail expression of the experience economy [2]. Rei Kawakubo's Berlin store in 2004 is widely regarded as a prototype of the modern pop-up concept. Its temporary format combined brand storytelling with unconventional retail practices, helping to build the brand's image and clear inventory [3]. Between 2004 and approximately 2010, work on the still-emerging concept generally placed pop-ups within guerrilla or temporary retailing and focused on promotion and events. Kim et al. [4] shifted the focus by defining pop-up retail as a highly experiential marketing environment devoted to a particular brand or product line, available for a limited period and usually occupying a small space that encourages face-to-face exchanges between consumers and brand representatives. Their definition related pop-ups to consumers' psychological characteristics and experiential value, treating the stores as settings for experience where earlier work had focused on promotion. Warnaby et al. [5] further defined the format in terms of experience-oriented interactions between consumers and brands within a specific but temporary space. They identified three central characteristics: a pared-down store environment, a concentrated focus on a brand or product line, and a limited lifespan. They also distinguished four strategic objectives: communication, experience, transactions, and testing. Later work in the United Kingdom by Jones et al. [6] emphasized exclusivity and distinctiveness. The cross-national survey by Rosenbaum et al. [7] found that contemporary pop-ups had evolved from early guerrilla retailing into strategically planned temporary physical retail operations, with objectives extending beyond sales to brand building, market testing, and the cultivation of loyal customers.

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Pop-up retail has expanded from market testing to providing brand experiences. In the survey by Rosenbaum et al. [7], more than 80% of the organizations considered their pop-up operations successful. Building brand awareness ranked first among the reported benefits, followed by developing customer relationships, introducing new products, and generating buzz. Direct sales ranked lower. The benefits therefore extended beyond inventory clearance and sales promotion.

2.2. The concept and scope of the debut economy

First-time innovation drives the debut economy. Initial product launches, the introduction of new business formats, new store openings, and applications of new technologies form a connected sequence of economic activities.

Gong and Lei [8] describe the debut economy as encompassing an entire development sequence, from the first release and exhibition of a product or service to the opening of a first store, the establishment of an initial research and development center, and eventually the location of a corporate headquarters. They regard it as a new economic form consistent with the requirements of high-quality development. Yu [9] further defines it as a system of economic activities formed when economic actors first introduce new business formats, models, services, or technologies. Its core lies in first-time innovation and connected development, covering four dimensions: new product launches, new store openings, new technology development, and new brand formation. Lai et al. [10] use Shanghai to illustrate the urban concentration of debut-economy activity. Between May 2018 and December 2023, more than 4,500 domestic and international brands held debut events in Shanghai, and 5,840 first stores opened, averaging 2.8 per day. More than 80 of these were first stores at the Asian level or above. In 2023, the city added 1,215 first stores and recorded a debut-economy activity index of 88.2. Shanghai's experience shows how first-store clustering and new product launches reinforce each other, linking consumer traffic with related commercial and industrial activity.

2.3. The intersection of pop-up retail and the debut economy

Studies of pop-up retail and the debut economy have largely developed separately. Their intersection in China's consumer market has received insufficient attention, especially the transition from pop-up to permanent retail. Temporary stores give brands low-cost opportunities to test market fit in actual consumption settings, gather consumer feedback, and develop brand communities [11]. Debut-economy policies in China support the move toward a lasting commercial presence through customs facilitation, financial incentives, and expedited approval procedures [12]. Together, pop-ups and debut activity are bringing the experience economy anticipated by Pine and Gilmore [2] into practice in China. Relatively low trial-and-error costs and considerable creative freedom make pop-ups a starting point for brands entering physical retail. Initiatives that connect first stores with neighborhoods and commercial districts then help turn temporary innovations into sustained operations. How these processes interact remains insufficiently theorized, particularly at the micro level of market experimentation, experiential feedback, and permanent establishment. The present study starts from this gap.

2.4. Research gap

Two gaps remain in the literature. Few studies trace how pop-ups work as micro-level market experiments and develop into permanent stores under the influence of the debut economy. Research

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on consumer experience and management strategy also remains methodologically separate, with few studies examining them within the same analytical framework. This article brings together the experience economy, pop-up retail, and the debut economy to examine the logic of temporary experimentation followed by permanent stores in China's experiential turn.

3. Theoretical framework

3.1. Three levels of drivers of the experiential turn

At the macro level, China's economy is adjusting toward consumption-driven growth, while household consumption patterns change as incomes continue to rise. Growth in online retail sales of physical goods fell from 31.6% in 2015 to 5.2% in 2025, and their share of total retail sales of consumer goods peaked around 2023 before declining (Figure 1). Meanwhile, services increased from 44.2% of per capita household consumption expenditure in 2018 to 46.1% in 2025 (Figure 2; [13-15]). The share of service consumption rose amid fluctuations and remained at 46.1% in both 2024 and 2025. These changes provide the macroeconomic context for brands' growing emphasis on offline experiences [14, 15]. Higher incomes mean that consumers are increasingly willing to pay a premium for settings, atmosphere, and cultural identification beyond the functional properties of goods. The experience economy has thus moved from a theoretical prediction toward an observable reality of consumption.

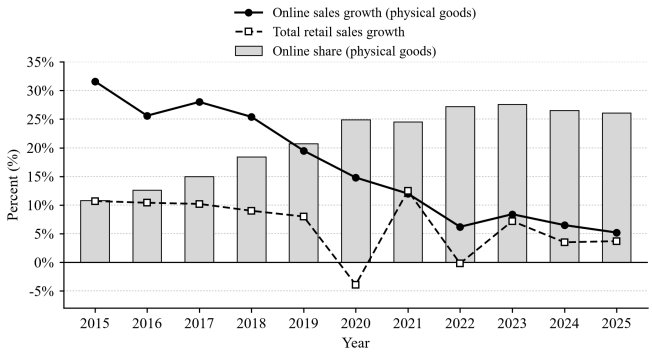

Figure 1. Growth in online retail sales of physical goods and total retail sales of consumer goods, and the online share of total retail sales, 2015–2025

Source: National Bureau of Statistics of China.

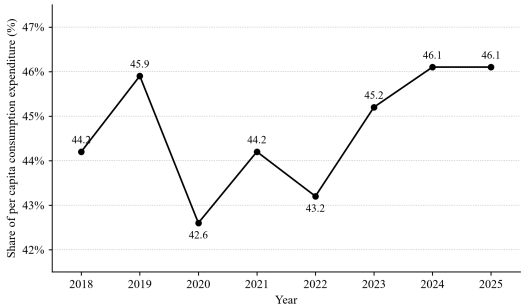

Figure 2. Services as a share of per capita household consumption expenditure, 2018–2025

Source: National Bureau of Statistics of China.

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This shift is particularly evident in the expansion of pop-up retail. The RET China Commercial Real Estate Research Center's report on pop-up stores in China identifies a period of rapid growth beginning in 2015, with a compound annual growth rate exceeding 100% [16]. An industry white paper published by the 36Kr Research Institute [17] estimated that pop-up retail transactions reached approximately 320 billion renminbi (RMB) in 2020.

At the meso level, change is taking place in cities and commercial real estate. Local governments use the debut economy as an important policy instrument to promote consumption. Shanghai and other cities offer subsidies and promotional support for first stores, first exhibitions, and debut shows; Shanghai added 1,269 first stores of various types in 2024 (Figure 3; [18]). Shopping malls are also offering concessions to brands as the growing supply of commercial space intensifies competition for brands and consumer traffic. To fill vacant units and attract visitors, malls are willing to offer temporary stores short leases, reduced rents, and even rent-free periods. Policy support and landlord concessions together lower the threshold for brands to enter physical retail.

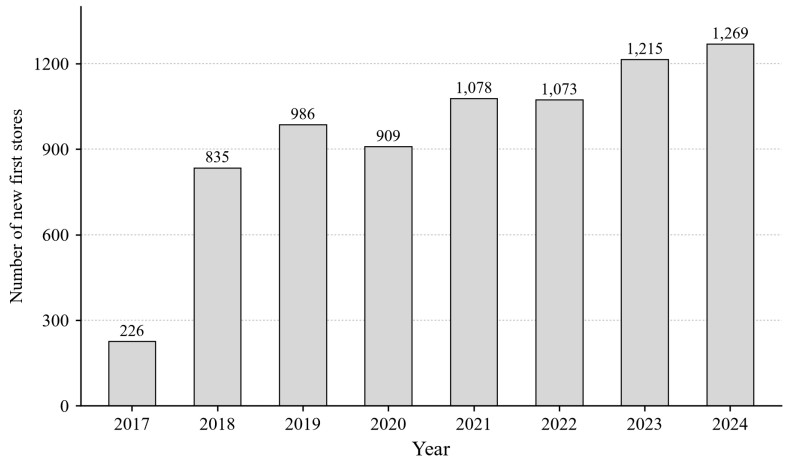

Figure 3. Newly introduced first stores in Shanghai, 2017–2024

Sources: China Commerce Data; Shanghai Municipal People's Government.

These changes in consumption and the institutional environment shape individual brands' decisions. A permanent store requires a long lease and substantial fixed investment, even though footfall remains uncertain. A pop-up limits these risks to a lease lasting several weeks or months. A rational brand will first test the market through a pop-up and use experiential feedback to decide whether to remain.

3.2. Slow pop-ups as an intermediate format

Existing discussions usually divide brands' physical presence into temporary and permanent forms, overlooking the transitional space between them. Between a pop-up lasting only a few days and a permanent store operating under a multiyear lease lie intermediate formats with progressively longer durations and larger investments. This article calls the most important of these a slow pop-up: a medium-term temporary store lasting from several months to more than a year. Its lease remains flexible and its exit costs stay limited. The longer duration allows the brand to assess repeat purchasing, community maintenance, and the cost structure of daily operations, which a brief pop-up cannot reveal. Pop-ups test products and brand awareness; slow pop-ups test the operating model itself.

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Slow pop-ups help explain the transition to permanent retail as a staged process guided by feedback. When experiential feedback is favorable, brands extend leases, increase investment, and develop store functions as they gradually move toward permanent operation. If feedback is unfavorable or the original model is disproved, they can return to a lighter temporary format and experiment again. Limited, reversible investment at each stage keeps the risks within what the brand can bear.

3.3. Analytical grid and core propositions

Table 1 combines duration and first-store status in a two-by-two analytical grid. The horizontal dimension distinguishes first stores from subsequent stores, and the vertical dimension distinguishes temporary from permanent operation. Temporary and permanent stores lie at opposite ends of the duration dimension. By lease length and investment, slow pop-ups belong on the temporary side, closest to permanent stores. Each of the four quadrants corresponds to a type of commercial practice. The analysis focuses on the dynamic path across these quadrants: brands begin on the temporary side and, through market experimentation and experiential feedback, eventually enter the quadrant of permanent first stores.

Table 1. Analytical grid of operating duration and first-store status

	First store in the specified market	Subsequent store in that market
Temporary (pop-up or slow pop-up)	First-store pop-up (market testing)	intellectual property collaboration pop-ups and buzz-generating pop-ups
Permanent	Permanent first store	Stores added through network expansion

Source: Author.

Before opening a permanent store in an unfamiliar city or product category, a brand has to commit to a lease, fit out the premises, and arrange staffing. It learns about local footfall, consumer acceptance, and actual operating costs only once the store is running. The largest investment therefore precedes the information needed to judge it, and the money is difficult to recover if the market disappoints. A temporary store changes this sequence. The brand can make a limited, reversible commitment, gather operating information, and defer the larger investment in permanent premises until uncertainty has declined substantially.

Proposition 1: The greater a brand's uncertainty about its target market and the less recoverable its investment in a permanent store, the more likely it is to enter through a temporary format to test the market before deciding whether to establish permanent operations.

A pop-up can show whether visitors stay, join activities, discuss the experience, and make an initial purchase. Such immediate responses matter greatly in experiential categories and provide information relevant to operating decisions. What a trial reveals therefore depends on the product category. For standardized products, success depends on stable repeat purchasing and supply-chain efficiency, but neither becomes clear within a few weeks of temporary operation.

Proposition 2a: The stronger the experiential attributes of a product category, the greater the predictive value of signals from pop-up trials for permanent-store performance.

Signal complexity also determines how long experimentation takes. Brand awareness and product acceptance can be assessed provisionally within a few weeks. Repeat purchasing, community

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cohesion, and the cost structure of daily operations take several months to become evident. When a conventional pop-up ends before a brand can assess these variables, the need for more time gives rise to longer-lasting temporary formats such as slow pop-ups.

Proposition 2b: The more complex the variables a trial needs to assess, the longer the period required to accumulate information. When this period exceeds the duration of a conventional pop-up, brands are more likely to adopt longer-lasting slow pop-ups to obtain signals sufficient to support a permanent-store decision. The more adequate the accumulated signals supporting sustained operation, the greater the likelihood of a transition from temporary to permanent operation.

The logic of experimentation assumes that signals accumulate within the brand itself, a condition that pop-ups based on external intellectual property (IP) collaborations do not satisfy. Their appeal derives from licensed IP and expires with the license. The success of a single event demonstrates the appeal of the IP without testing the store's own operating capabilities, making feedback from one trial difficult to use as a basis for subsequent operations. When feedback cannot accumulate, a single successful trial cannot readily support permanent investment. Permanent operation for these stores must therefore rest on a different foundation.

Proposition 2c: The more a pop-up's appeal depends on external IP rather than the brand itself, the harder it is for feedback from a single trial to accumulate into a basis for permanent operation. These operators sustain permanent stores through institutionalized content rotation within fixed premises and operating systems, converting successive waves of short-term attention into sustained footfall.

Once a trial ends, the brand decides whether to stay or withdraw using the evidence on footfall, repeat purchasing, community cohesion, and communication effects. The more adequate the evidence, the more willing the brand is to invest further. If the evidence is insufficient or the original assumptions are disproved, the brand can run another trial in a lighter format. Debut-economy policies enter this decision through costs. With the same market feedback, a brand receiving subsidies, promotional support, and facilitated approvals finds it easier to move into permanent operation.

Proposition 3: Debut-economy policies reduce the costs of moving from temporary to permanent operation, making store-opening decisions that would otherwise be marginal easier to undertake.

4. Research method and case selection

A multiple-case design allows this study to examine how brand decisions, shopping-mall conditions, and the policy environment interact during the move from pop-ups to permanent stores in real-world settings [19]. Replication across cases supports conclusions that are more robust than those from a single case. Case selection follows theoretical sampling, giving priority to information richness and relevance to the research purpose over statistical representativeness [20]. For the main comparison, the brands must have moved from temporary formats into permanent stores. To Summer and On both meet this condition, but began from different positions. To Summer is a digitally native fragrance brand based on contemporary interpretations of Chinese culture; On is an international sportswear brand entering China. Their industries, organizational forms, and reasons for entering physical retail differ. The fact that both followed the same path gives stronger grounds for explaining the transition through their shared market and institutional conditions.

To Summer provides the main account of the transition, from pop-up trials to the replication of themed stores and then to flagship stores. On's sequence adds the slow-pop-up format and the role of debut-economy policies. The analysis asks the same questions of both brands, starting with how they

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reached consumers before entering physical retail, where they placed their pop-ups, and how those stores attracted visitors. It then examines what carried over from the temporary phase, what informed the decision to stay permanently, and how store numbers, expansion, and sales developed afterward. Photoism provides the contrasting case. This self-service photography brand draws most of its footfall from IP collaborations, so its trial signals do not accumulate within the brand itself. It sustains permanent operation through institutionalized content rotation, helping to define the boundaries of the propositions.

5. Case analysis

5.1. To Summer

To Summer, or Guanxia in Chinese, is a fragrance brand rooted in contemporary Chinese aesthetics. Its main products are home fragrances and perfumes. Its designs draw on Eastern botanical imagery, including osmanthus, pine, and cypress. The brand launched in early 2019 through a WeChat mini-program and sold exclusively there, without joining major platforms such as Tmall or JD.com. It sold 1,000 products on the first day, and the signature Autumn Osmanthus home fragrance sold out within three seconds [21]. This gave the brand initial evidence of online demand, but it still had no physical stores. An offline trial was needed to find out whether that demand would generate daily footfall and cover rent.

The offline trial began in September 2020 at Lane Crawford in Beijing's Financial Street Shopping Center, where To Summer opened a temporary fragrance space [21]. The counter required a short lease and limited investment. If performance disappointed, withdrawal costs would be confined to the counter, keeping the risk within the brand's financial capacity. In its first month, it ranked among the top three brands by sales in Lane Crawford's beauty and wellness section [22]. The counter thus provided the first physical-retail confirmation of the demand seen online.

The successful trial led to a longer commitment. In December 2020, three months after opening the fragrance space, To Summer launched its first permanent store, To Summer's Living Room, in the northern section of Beijing's Taikoo Li Sanlitun. Product displays occupied only about 20 of its approximately 170 square meters. The rest was used for leisure, conversation, and exhibitions [23]. Under a long lease, the store retained the priority given to experience over transactions that had worked during the pop-up trial. Investment then increased. In January 2022, the first Shanghai flagship, To Summer Xianting ("Tranquil Courtyard"), opened in a renovated historic house on Hunan Road. A national flagship opened in a courtyard residence in Beijing's Guozijian area later that year [24]. Yet the brand returned to a temporary format when it entered South China in April 2022, despite having enough permanent-store experience to open one directly. To Summer's Eastern Courtyard, its first South China location, opened as a pop-up at Shenzhen's MixC World and set the brand's national daily sales record [22]. Its first permanent Shenzhen store followed [25]. Even as To Summer matured, it continued to test unfamiliar markets through pop-ups.

The stores also express how To Summer understands its business. Co-founder Shen Li calls it a content-led creative company and predicts that 90% of future brand companies will be content companies [26]. The stores organize their content around each city's culture. In Shanghai, the historic house combined Eastern and Western influences, and its restoration became part of a narrative connecting the store to the city's historic neighborhood. Shenzhen's Eastern Courtyard used a predominantly white palette to evoke a snowy landscape and create a distinctive brand memory through its contrast with the subtropical setting [21, 24]. These local choices changed the stores

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from sales outlets into places that also connect the brand with urban culture. The experience of operating such spaces began to develop during the pop-up phase.

By May 2021, To Summer's WeChat subscriptions had reached approximately one million, its loyal customer base exceeded 100,000, and its repurchase rate was around 60%. Industry estimates put its 2021 gross merchandise value from the WeChat mini-program alone above RMB 100 million [21]. Its physical store system developed into four formats requiring different levels of investment. Pop-ups, with the lowest commitment, continued to test new markets; flagships, with the highest commitment, supported long-term operations in core cities; themed stores and boutiques occupied the intermediate positions. An industry forecast anticipated that these four formats would account for more than 70% of the brand's business over the following three years [22]. To Summer expanded from one validated format to the next, investing more at each step.

5.2. On

The Swiss running-shoe brand On entered China in 2018. It connected with consumers through running-community activities while opening a Tmall flagship store. By May 2024, its Tmall flagship had approximately 680,000 followers, with average shoe prices above RMB 1,000 [27]. Through these online channels, On tested whether Chinese runners in the premium segment would accept professional running shoes priced at more than RMB 1,000. By the end of 2019, On had opened its first directly operated store in China at Shanghai's Pudong Kerry Parkside, also its first directly operated store worldwide. The mall already housed premium outdoor brands such as Arc'teryx, giving On's premium positioning initial confirmation in physical retail.

On continued to experiment after opening its first store. It opened the temporary Station S store at Beijing SKP-S in July-August 2021. Inspired by an Alpine ecological cabin, it combined exclusive limited-edition products with screen-printing workshops to test whether themed experiences and limited releases could generate publicity and identify core customers in a premium mall. The next focus was street-level retail. From late 2023 to April 2024, a pop-up on Shanghai's Yanping Road operated for approximately four to five months and repeatedly hosted outdoor running-community activities [28]. The trial examined whether a street-level store could use running communities to turn passers-by into brand-community customers. On returned to Beijing SKP-S in September-October 2024 with an art-themed pop-up and opened a collaboration pop-up in Shanghai Xintiandi in March 2025. These recurring pop-ups let the maturing brand continue testing different cities and settings.

Six months after the Yanping Road pop-up ended, its favorable results prompted long-term investment. On opened Runner's Base at Shanghai's West Bund Dream Center on October 30, 2024. This was its first permanent community store in China and its first permanent urban street-level store in the country. Of the approximately 300 square meters, nearly 70% was allocated to activities, experiences, and rest, and 30% to retail. Facilities included running-shoe rental, self-service lockers, and a designated area for runners to leave their pets temporarily. The long-lease premises retained in full the community-retail logic repeatedly tested at Yanping Road [29]. Li Meina, On's Greater China retail executive, explained that the store was intended to make exercise more accessible and that the model could be replicated. This indicates that On had confirmed the street-level community model tested during the pop-up phase as suitable for expansion. On April 25, 2025, the brand opened its first China flagship in Chengdu's Taikoo Li [30], marking the transition from market experimentation to a lasting presence in China. Its expansion followed a sequence from a mall store to a street-level pop-up, a permanent community store, and a city flagship. Each format entered a larger, longer-term deployment after the preceding experiment had been validated.

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On's store network grew rapidly over this period, providing the most visible outcome of this path. During 2018-2022, On opened approximately 12 stores in China; by the end of 2023, its directly operated network had grown to approximately 22 stores [31]. By November 2024, it had 65 stores in Greater China [29]. On planned to expand this network to more than 100 stores in China by 2026 [30]. Asia-Pacific net sales grew by 95.6% on a constant-currency basis in 2024 [32]. The region's share of group net sales rose from 7.9% in 2023 to more than 20% in the first quarter of 2026 [31, 33]. From the Yanping Road pop-up to Runner's Base, On completed a full transition from experimentation to permanent operation: the former validated the community-retail logic over four to five months, while the latter established it in a space capable of sustained operation. The causal relationship between experimentation and permanent operation is reflected in this continuous sequence of events and spatial strategies.

5.3. Photoism

Photoism is a self-service photography brand established in South Korea in 2019 [34] that entered China in 2024 [35]. Whereas To Summer and On first used pop-ups to test markets before deciding whether to establish permanent operations, Photoism entered China with a pronounced orientation toward the idol economy. Popular Korean groups including BTS, TWICE, NCT, and ENHYPEN have collaborated with Photoism, allowing customers to take interactive photographs using frames featuring the artists' images [34]. Only a small part of this appeal comes from the brand's own spatial narratives or community operations; most derives from the immediate attraction of external IP and young consumers' aesthetic preferences for Korean popular culture.

Photoism's pop-up model is a routine mechanism of content renewal. The brand rotates its IP collaborations at a very high frequency, with new collaborative frames appearing almost every week. Each collaboration operates as a separate pop-up event: fans arrive for a particular IP and leave after taking their photographs, so the connection between brand and consumer exists within a brief window. Photoism's footfall therefore depends on repeated stimulation from changing external IP and has little connection to brand loyalty.

The fundamental reason why the success of a single IP collaboration cannot accumulate into a basis for permanent operation is that consumers pay for the IP rather than the brand. Once enthusiasm for a collaboration subsides, its footfall dissipates, and stores often attract little interest when normal operation resumes; they have even been given the disparaging nickname "mall assassins." This differs sharply from the logic of To Summer and On. Their pop-up trials test whether a spatial format or community mechanism is sustainable and, once validated, incorporate it into the operating core of permanent stores. Each Photoism collaboration is a separate, non-replicable event, and the time-limited popularity of its IP prevents it from becoming content for long-term operation. Photoism's permanent stores therefore cannot rest on the success of any single collaboration; they must sustain footfall through a continuous supply of IP.

Photoism's permanent operation relies on precisely this strategy of frequent IP rotation. The brand expanded rapidly to more than 100 stores in China [34]. Its location strategy places it in busy mall atriums and passageways to maximize exposure at minimal cost. In some cities, Photoism operates stores directly to maintain quality control over IP licensing and profit sharing. Its profit model rests on the immediate conversion of demand for collaborations rather than on repeat purchasing. Individual transactions cost tens of renminbi, with consumers able to choose services at different prices according to frame content and shooting format. The model is vulnerable to differences in location. Industry reporting shows that footfall at self-service photography machines depends on where they are placed, with substantial differences in operating performance across sites [34]. For

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operators that attract customers through IP collaborations, sustaining permanent operations also requires a continuing supply of content that appeals to consumers. Photoism demonstrates that permanent operation sustained through the rotation of external IP is essentially a perpetual pop-up. It has made temporariness the norm without completing the transition from experimentation to a lasting brand presence.

6. Discussion

To Summer, On, and Photoism operate in fragrance, sportswear, and self-service photography, respectively. They differ in organizational form, in their starting points, and in how they entered physical retail. To Summer and On nevertheless followed similar paths from pop-ups to permanent stores, while Photoism provides a contrast. Comparing the three cases reveals patterns that a single case would not show.

First, temporary experimentation followed by permanent stores is a rational response to structural constraints. To Summer and On differ substantially in resources and brand recognition. To Summer was a local start-up launched through a WeChat mini-program in 2019, with limited financial resources, no experience of physical retail, and no backing from mainstream e-commerce platforms. On entered China in 2018 as a Swiss sportswear brand with a global supply chain and premium positioning. It expanded online sales through its Tmall flagship and launched its first directly operated store worldwide in a premium mall in late 2019. Yet both chose pop-ups as a starting point for physical expansion. Their common path is difficult to explain by individual management preferences. Their shared response to market uncertainty offers a more convincing explanation. Without adequate information on consumer preferences, footfall, and costs, a brand risks sunk costs when it signs a long lease and makes substantial fixed investments in a market that underperforms. A pop-up lets it obtain operating information through limited investment and delay the largest commitment until uncertainty has fallen significantly. The brand can therefore obtain market feedback before making its largest commitment, addressing the timing mismatch described in Proposition 1.

Second, category attributes and signal complexity explain why the two brands needed trials of different lengths. To Summer's fragrances are experiential products, for which a few weeks at a counter can reveal enough about immediate consumer responses to inform a decision. On had to assess whether running communities could turn passers-by into brand participants at a street-level location. This depended on community cohesion, willingness to purchase again, and the cost structure of daily operations, as well as favorable responses to an individual experience. These more complex signals require several months of continued operation to become evident. The Yanping Road pop-up ran for four to five months, making it a slow pop-up. The comparison supports Proposition 2b: temporary formats last longer when the variables being tested require information that a conventional pop-up cannot provide.

Third, To Summer and On could retain what their trials had built because the attractions were rooted in their own operating systems. Eastern fragrance narratives and running-community activities drew consumers to the brands, and the resulting footfall, repeat purchasing, and community relationships supported subsequent permanent operation. Photoism draws consumers through particular external IP under time-limited licenses. An event's success demonstrates that IP's appeal without establishing the store's operating capability, so its signals cannot accumulate across periods. This is the boundary expressed in Proposition 2c: trial feedback can support permanent investment only when the source of attraction is rooted in the brand itself. Dependence on external

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IP requires perpetual pop-ups to maintain the temporary format, without completing the transition to permanent operation.

Fourth, debut-economy policies lower the cost threshold for moving into permanent operation. Media accounts placed On's Chengdu Taikoo Li flagship within the first-store economy [30]. Subsidies, promotional support, and facilitated approvals reduced the frictional costs of this transition, making marginal store-opening decisions easier. Brands remained responsible for collecting and interpreting market signals to assess demand. Experimentation and policy support therefore contribute to different parts of the decision: the former supplies information on demand, while the latter reduces entry and expansion costs.

The move to permanent retail proceeds through limited commitments to temporary formats. As operating signals become adequate and the model is validated, brands extend leases, increase investment, and gradually establish permanent operations. Debut-economy policies lower the costs near the investment threshold, supporting this staged progression while market feedback continues to guide the decisions.

7. Conclusion

As China's economy and per capita consumption have grown, its consumer market has taken an experiential turn, while the debut economy has become a national strategic priority. Within this setting, the cases of To Summer, On, and Photoism address how brands move from temporary trials to sustained permanent operation. The analysis identifies feedback-driven, staged progression as the central mechanism. In actual consumption settings, pop-ups and slow pop-ups provide low-cost ways to gather signals about market fit, consumer responses, and the effectiveness of operating models. Brands judge whether to invest further and establish permanent operations according to how adequate those signals are. Subsidies, customs facilitation, and expedited approvals lower transition costs and make marginal store-opening decisions easier, with market experimentation remaining central.

The article develops five propositions that bring the experience economy, pop-up retail, and the debut economy into one analytical framework. Greater market uncertainty encourages temporary experimentation before permanent investment (Proposition 1). Category attributes influence trial duration, and complex signals explain the emergence of slow pop-ups as an intermediate format (Propositions 2a and 2b). Signals from pop-ups whose appeal depends on external IP cannot accumulate into a basis for permanent operation (Proposition 2c). Market feedback and the policy environment play complementary roles in the transition decision (Proposition 3).

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