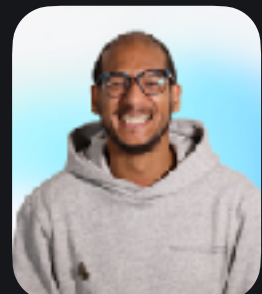


RESEARCH

15 Consumer Channels Shaping the Future of Retail



“The future of retail is marked by the shift from single points to ecosystems that seamlessly move with the customer.”



Leyash Pillay
Head of Venture Club

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Over the last decade, retail channels have evolved from physical stores to digital commerce and now into connected ecosystems where discovery, experience, community, and conversion blur across customer journeys.

Today, over 80% of consumers buy across three or more channels per journey, demanding brands rethink not just where they sell, but how discovery and conversion happen. In response, companies are experimenting with new spaces for discovery, engagement, and purchase, building flexible channel portfolios with the agility to move fast as new opportunities emerge.

To help you more effectively navigate today's retail channels, we've mapped out 15 of the most impactful ones across four strategic clusters:

CLUSTER 1 Discovery Channels

CLUSTER 2 Experience Channels

CLUSTER 3 Convenience Channels

CLUSTER 4 Community Channels

Each channel is analysed through a consistent lens: what it is, how it's evolved, why it matters for corporates now, and where the innovation opportunities lie.

Whether you're validating a new bet, scaling an existing channel, or experimenting at the edges, this framework helps you make smarter strategic choices in an increasingly complex retail landscape.

Emerging Retail Channel Patterns

1

Algorithmic discovery is the new shelf

Social commerce hit \$1.16T in 2024 and is forecast to grow 36.4% CAGR (2025–2033), putting creators and platform algorithms at the top of product discovery.

2

Omnichannel is the default journey

73% of consumers are omnichannel shoppers, rewarding brands that unify identity, carts, and loyalty across touchpoints.

3

Commerce goes “background”

Click-and-collect is mainstream, with 53% of U.S. shoppers using it in 2024, normalising subscriptions, reorders, and hybrid pickup as invisible daily utilities.

4

Circular moves from virtue to value

Apparel resale is set to grow 6.4× faster than retail and reach ~17% CAGR to 2028, making recommerce a core revenue channel.

5

Commerce media = growth engine

Retail media ad spend is forecast to grow 17.2% CAGR (2024–2028) and account for ~16% of global ad spend in 2025, shifting budgets toward shoppable, first-party environments.

6

Community commerce scales globally

Social-led buying is surging: APAC holds 71.6% of global social-commerce share, with smartphones driving 91% of transactions.

Growth Beyond Core for Consumer Brands

Get more info →

New Venture Units

Define Your Venturing Strategy

Discover New Opportunity Areas

Design Your Venturing Unit

Assess Your Venturing Portfolio

New Offerings & Ventures

Design and Validate Propositions

Build and Launch Your MVP

Resident Venture Leads

Run an Intrapreneurship Program

Strategic Partnerships

Curate High Potential Startups

Facilitates Startups Partnerships

Facilitate Corporate Partnerships

Build a Venture Partner Program



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The 4 Clusters of the New Retail Ecosystem

Consumer channels shaping the future of retail

Retail is now an interconnected ecosystem, driven by evolving consumer motivations.

Discovery Channels

Where inspiration meets transaction

CLUSTER 1

1. Social commerce
 2. Influencer-led commerce
 3. Live shopping streams
 4. AI shopping assistants
- Strategic signal: Trust shifts from brands to people and algorithms. Discovery becomes decentralised.

Experience Channels

Retail as immersion and emotion

CLUSTER 2

5. Pop-ups & brand events
 6. Flagship Experience stores
 7. AR/VR Shopping environments
 8. Immersive & gaming commerce
- Strategic signal: Consumers buy into stories and sensations. Experience is retention

Convenience Channels

Removing friction across the buying journey

CLUSTER 3

9. Quick commerce / instant delivery
 10. Voice and Conversational commerce
 11. Subscription and auto replenishment
 12. Hybrid click and collect
- Strategic signal: Loyalty can be built on convenience with the idea of commerce disappearing into daily life.

Community Channels

Commerce as belonging and participation

CLUSTER 4

13. Re-commerce, rental & resale platforms
 14. Branded niche-media
 15. Group commerce
- Strategic signal: value is co-created. Communities drive advocacy and circular growth

Discovery Channels

Where inspiration meets transaction

Discovery channels are where consumers first encounter products, often through creators, communities, or AI-driven recommendations before deciding to buy.

In these spaces, discovery is no longer controlled by brands but shaped by algorithms, trusted voices, and peer influence. This model shifts power from ads to authenticity, turning attention into the new currency of retail.

CHANNELS INCLUDE:

- Social commerce
- Influencer-led commerce
- Live shopping streams
- AI shopping assistants

WHY IT MATTERS:

- Discovery and conversion now merge in real time across platforms.
- Trust is built through creators, peers, and curation rather than brand messages.
- The path to purchase is guided by relevance, entertainment, and interaction.



Experience Channels

Retail as immersion and emotion

Experience channels turn shopping into a sensory and emotional journey. They're built to captivate, blending storytelling, design, and technology to create spaces where consumers buy, connect, and feel.

These channels let brands express their identity in tangible, memorable ways, turning transactions into experiences and experiences into loyalty.

CHANNELS INCLUDE:

- Pop-ups & brand events
- Flagship experience stores
- AR/VR shopping environments
- Immersive & gaming commerce

WHY IT MATTERS:

- Experience builds deeper emotional bonds and long-term retention.
- Physical and digital storytelling create multi-sensory brand engagement.
- Consumers buy into meaning and memory, not just convenience or price.



Convenience Channels

Removing friction across the buying journey

Convenience channels are built around ease, speed, and seamless integration into daily life. They reduce friction from discovery to delivery, by anticipating needs and simplifying choices.

Automation, subscriptions, and instant fulfilment turn commerce into a background service rather than a standalone act, building loyalty through effortlessness.

CHANNELS INCLUDE:

- Quick commerce / instant delivery
- Voice and conversational commerce
- Subscription and auto-replenishment
- Hybrid click & collect

WHY IT MATTERS:

- Frictionless design drives repeat use and long-term brand loyalty.
- Convenience and personalisation redefine value beyond price.
- Top brands blend utility and anticipation to serve customers before they ask.



Community Channels

Commerce as belonging and participation

Community channels thrive on connection. They turn customers into contributors and brands into ecosystems where value is shared, not just sold.

These channels deepen relationships by aligning commerce with shared purpose and identity. Ownership gives way to participation, and transactions become expressions of values.

CHANNELS INCLUDE:

- Re-commerce, rental, resale platforms
- Branded niche-media
- Group commerce

WHY IT MATTERS:

- Community builds trust, advocacy, and repeat engagement.
- Shared values turn customers into active brand ambassadors.
- Community-powered models make brands more resilient and adaptable.



The 15 Consumer Channels, Analysed

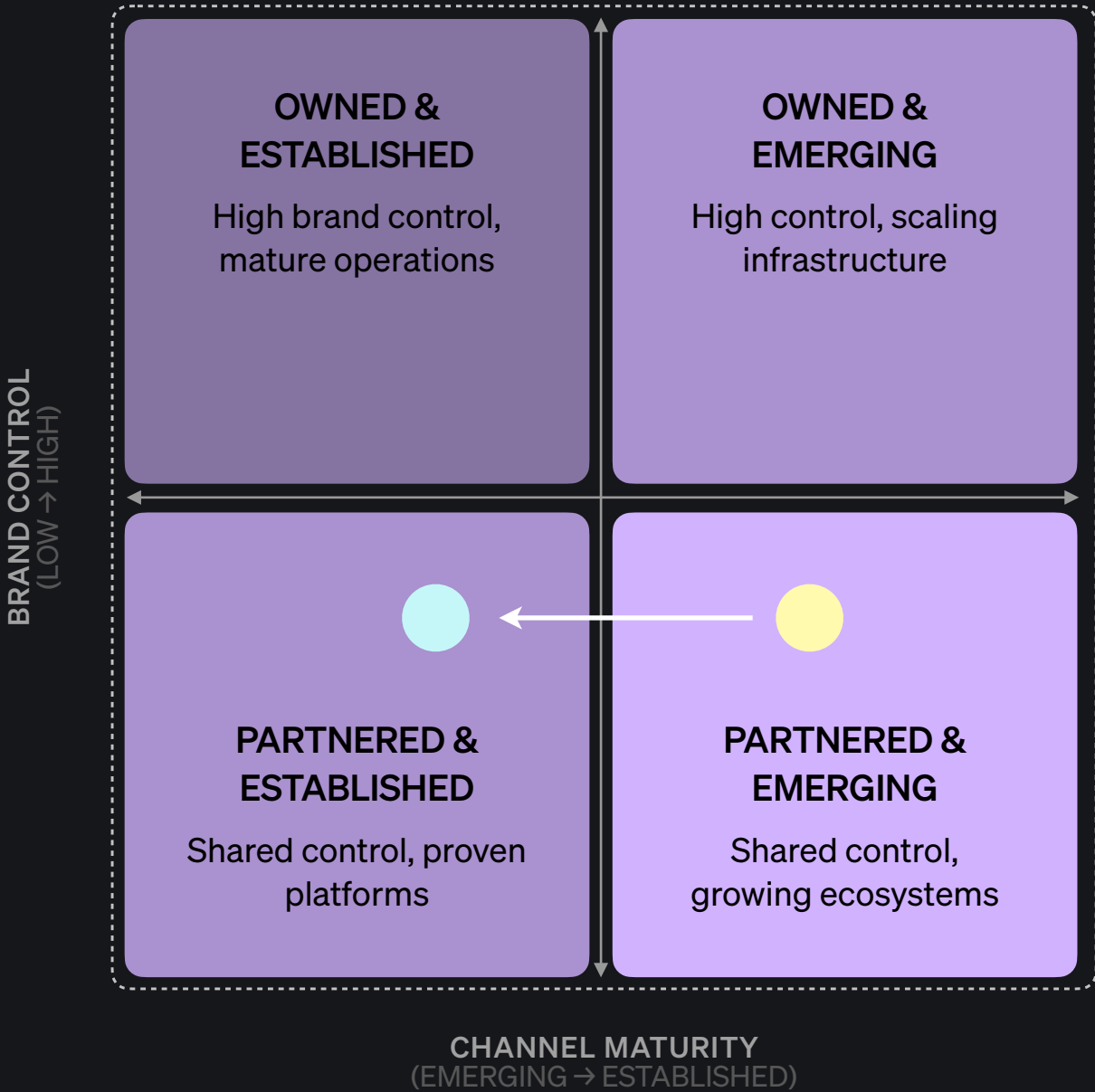
How each channel is analysed

Each channel is analysed by consumer motivation, maturity stage, and strategic positioning, offering a clear view of the retail landscape's evolution and emerging opportunities across discovery, experience, convenience, and community.

HOW HAS IT EVOLVED

Maturation of the from experimentation to proven ROI and scalable application. It captures the shift from isolated pilots to systems that redefine brand-consumer interaction.

CHANNEL POSITIONING MATRIX



Maps each channel by its level of brand control and market maturity to identify where brands should invest, scale, or collaborate. It reveals whether value is created through ownership, partnership, or ecosystem participation.

CHANNEL SNAPSHOT

INNOVATION POTENTIAL	High	Medium	Low
based on opportunity potential			
MATURITY STAGE	Emerging	Scaling	Established
MARKET SIZE	Projected market worth		
COMPLEMENTARY CHANNELS	Which channels work best together		
BEST FOR	Primary use cases (e.g., discovery, conversion, retention)		
CORE KPI	Key performance metric for the channel		

WHY IT MATTERS

Explains the channel's strategic value and how it drives growth, loyalty, and differentiation within the retail ecosystem.

INNOVATION OPPORTUNITIES

Highlights new ways to test, partner, or differentiate within the channel.



CLUSTER 1

Discovery Channels

Where inspiration meets transaction

Social Commerce

From social media marketing to native in-app purchasing

WHAT IS IT?

Social commerce integrates shopping directly into social platforms, allowing users to discover, evaluate, and purchase without leaving their feed.

HOW HAS IT EVOLVED?

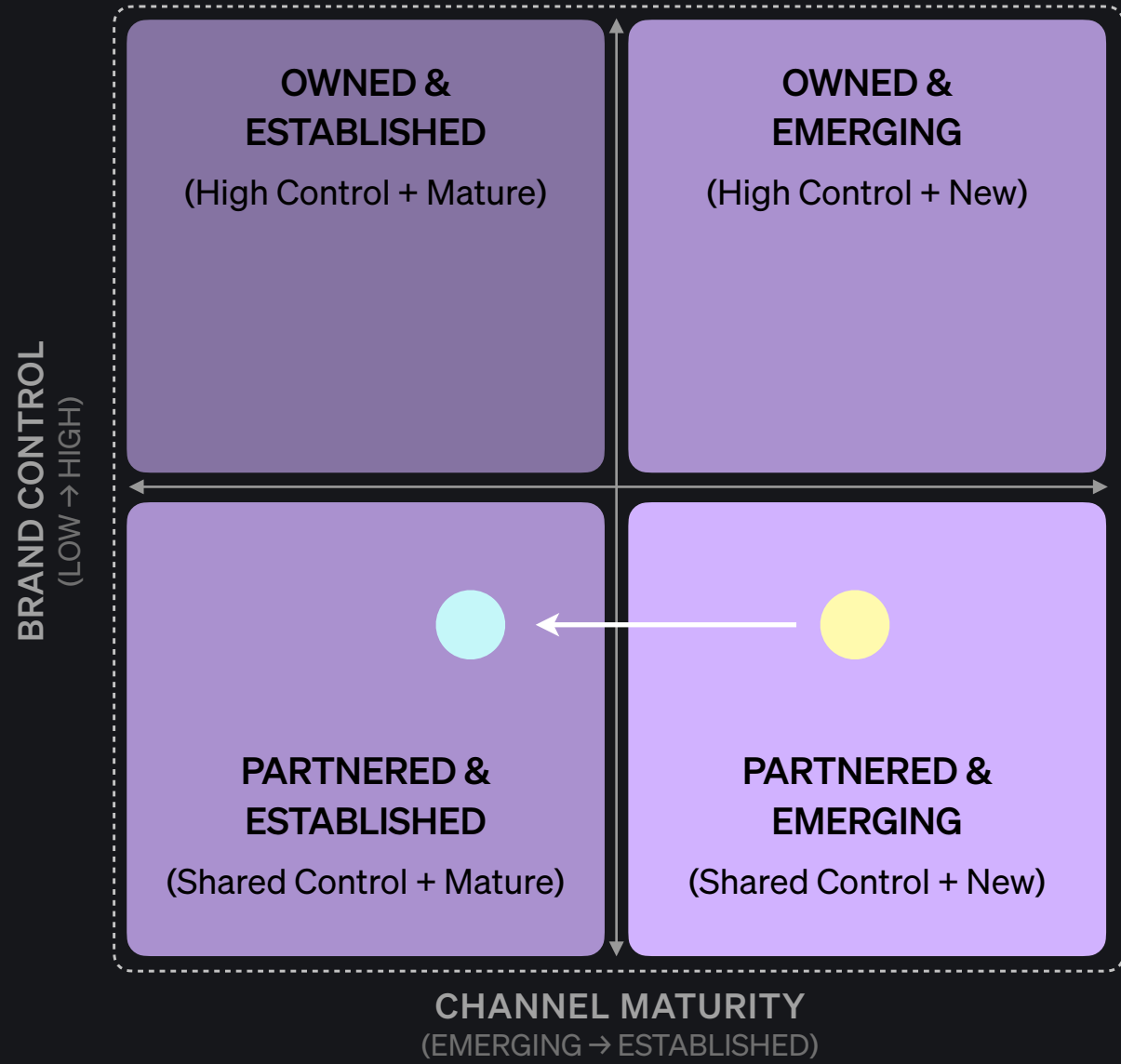
Social platforms have evolved from influencer posts to AI-powered in-app stores where engagement and purchase merge.

Platforms are now end-to-end commerce engines where engagement, trust, and purchase happen in one flow.

WHY IT MATTERS

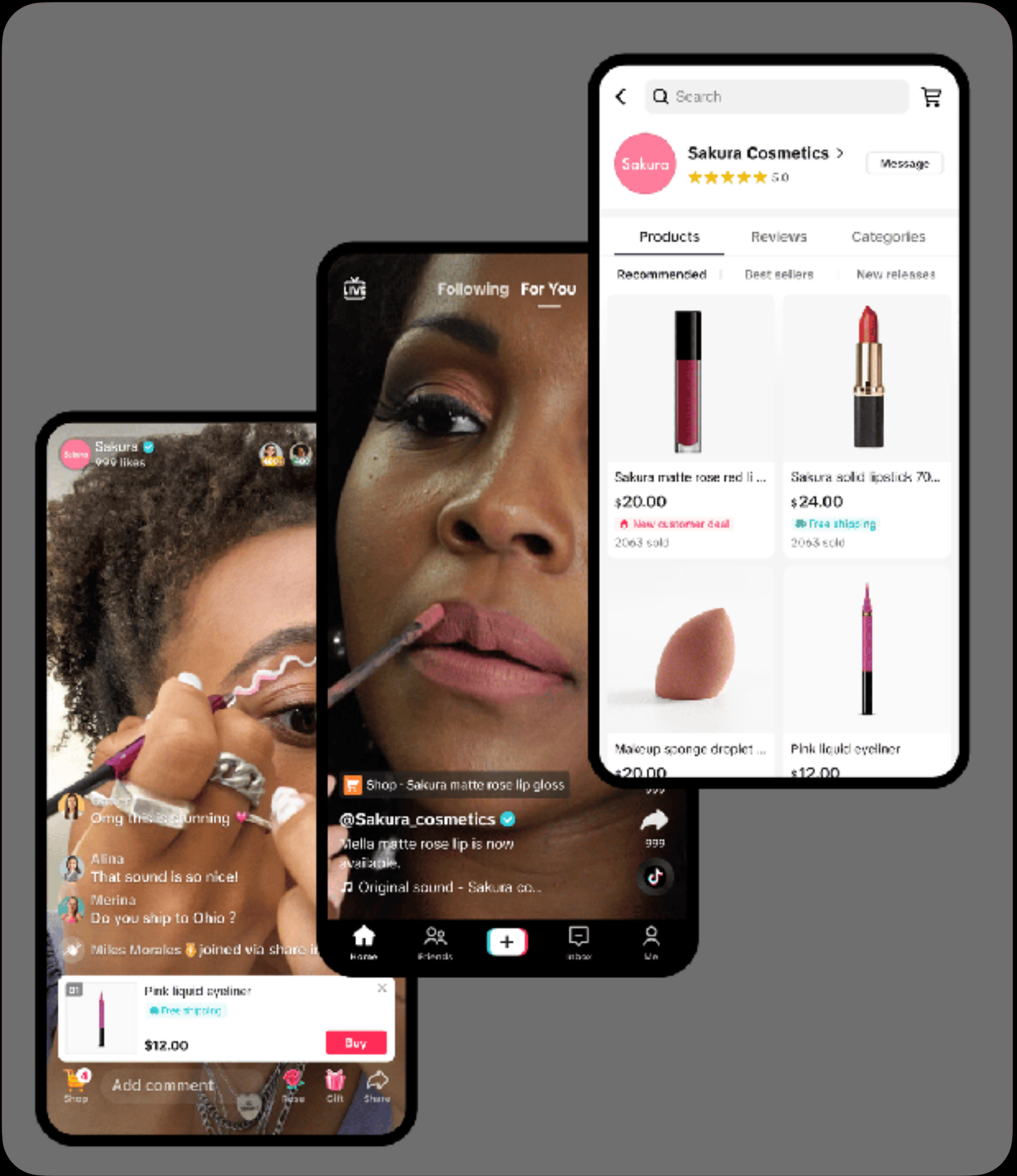
- Algorithms, not ads, now decide retail winners.
- Engagement and sales now happen in real time.
- Algorithms shape reach, relevance, and revenue in real time.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION POTENTIAL	High	Medium	Low
MATURITY STAGE	Emerging	Scaling	Established
MARKET SIZE	\$6.2T by 2030		
COMPLEMENTARY CHANNELS	Retail mediaD2C		
BEST FOR	Discovery	Conversion	Engagement
CORE KPI	Conversion rate		



INNOVATION OPPORTUNITIES

- Partner with micro-influencers for hyper-targeted conversions.
- Integrate loyalty programs directly into in-app stores.
- Leverage AI for real-time product curation and recommendations.



Case Study: Unilever's Social-First Strategy

CHALLENGE:

Unilever needed to modernise its marketing mix as younger consumers shifted to social discovery and influencer-led shopping.

EXPERIMENT:

Shifted to a social-first model, with 50% of ad spend to social platforms. It tested TikTok Video Shopping Ads across beauty and personal care brands, linking creator videos to in-app checkout.

OUTCOME:

Campaigns drove a +17% lift in purchases and +20% in checkouts. Real-time data and AI optimisation turned social into a scalable performance channel across brands and regions.

Unilever now applies the same testing model to all new social activations.

STRATEGIC TAKEAWAY:

Blend influencer storytelling with AI-driven testing to turn engagement into measurable sales.



Influencer-Led Commerce

From social media marketing to native in-app purchasing

WHAT IS IT?

When influencers curate, promote, and sell products through integrated storefronts, affiliate links and live shopping, building trust and driving conversions.

HOW HAS IT EVOLVED?

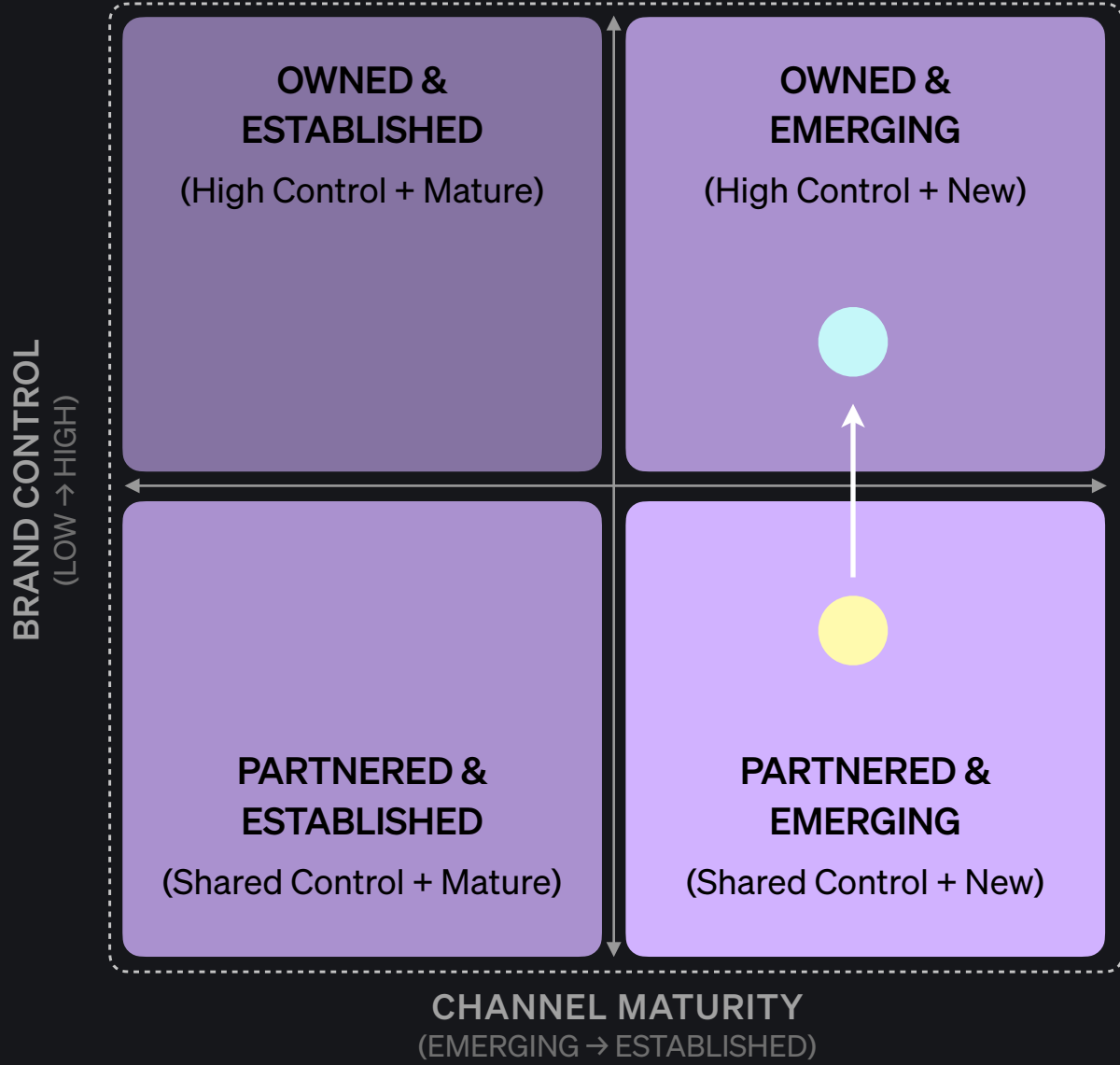
Once limited to paid posts and affiliate links, influencer commerce now spans full brand collaborations, in-app storefronts, and exclusive co-branded drops.

Platforms like TikTok and YouTube are building tools that make creators direct retail operators.

WHY IT MATTERS

- Trust in peers now outweighs trust in ads.
- Creators blend insights with real-time feedback loops.
- Co-branded products create deeper loyalty and organic reach.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION POTENTIAL

HighMediumLow

MATURITY STAGE

EmergingScalingEstablished

MARKET SIZE

\$121.81Bby 2030

COMPLEMENTARY CHANNELS

retail mediaD2C websitesSocial commerce

BEST FOR

Awarenessconversionbrand trust

CORE KPI

Conversion ratereturn on ad spend (ROAS)



INNOVATION OPPORTUNITIES

- Launch creator-led capsule collections to test new markets.
- Use influencer data for faster product validation and iteration.
- Build long-term equity partnerships with top-performing creators.



Case Study: Rhode's Influencer-Led Growth

CHALLENGE:

To accelerate the growth of a skincare brand in a crowded market by turning social influence into lasting consumer trust and sales.

EXPERIMENT:

Rhode launched in 2022 with curated SKUs, minimalist design, and D2C storytelling powered by creator collaborations and real-time customer feedback.

OUTCOME:

Rhode became one of the fastest-growing US beauty brands and was acquired by e.l.f. Beauty in May 2025 for \$1B. Strong community loyalty, fast sell-through and viral launches proved creator-led commerce can scale.

STRATEGIC TAKEAWAY:

Use community feedback, content-driven launches, and tight product curation to scale trust into long-term enterprise value.



Live Shopping Streams

Entertainment meets conversion in real time

WHAT IS IT?

Live shopping streams combine video, social interaction, and instant checkout. Viewers engage with hosts in real time, ask questions, and buy directly during the broadcast.

HOW HAS IT EVOLVED?

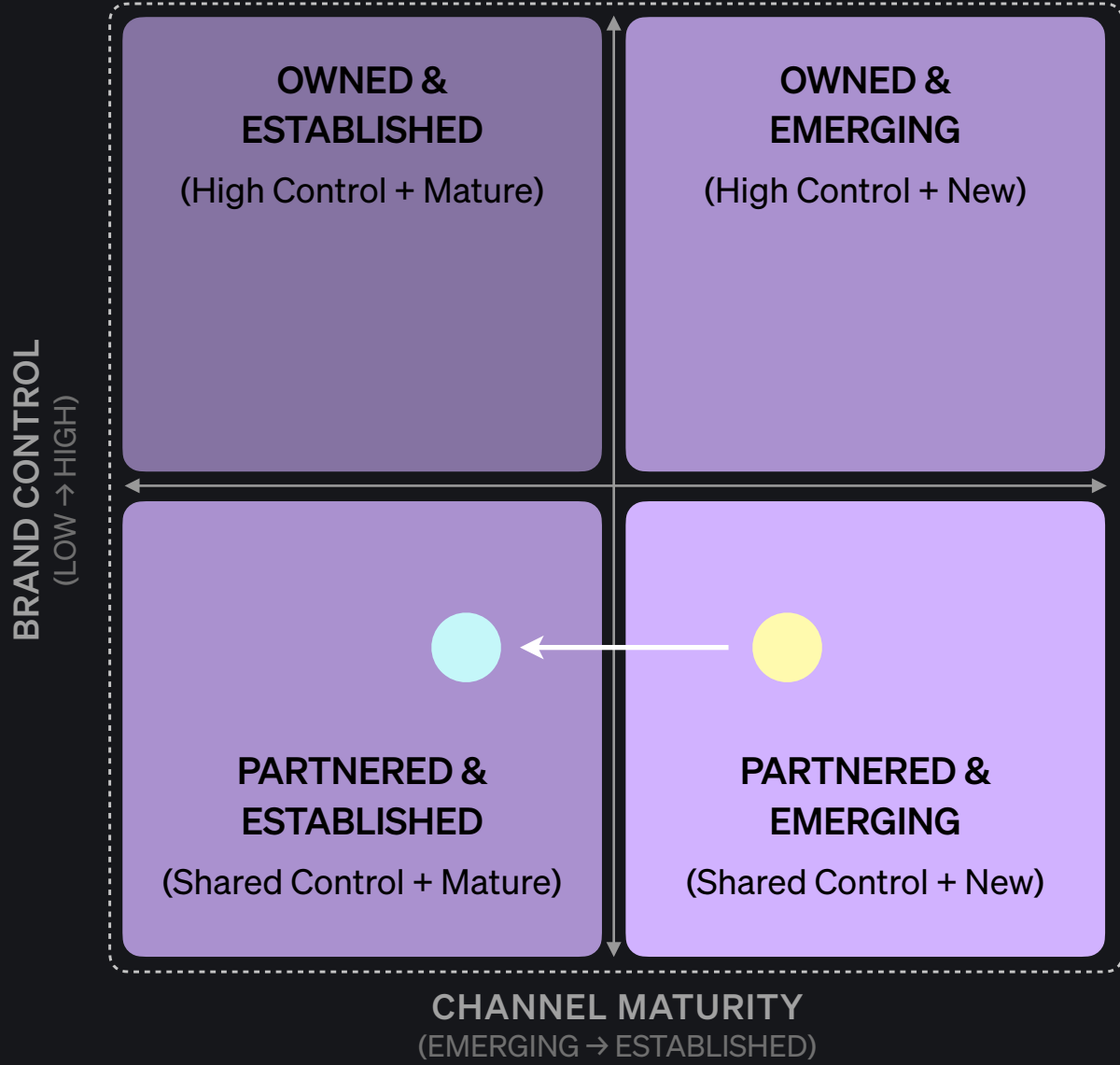
Live shopping has become a global format adopted by major retailers and brands.

Advances in mobile streaming and social commerce integrations now make it a key sales driver during product launches and peak events.

WHY IT MATTERS

- Drives higher conversion than static e-commerce.
- Builds stronger engagement and loyalty through interaction.
- Creates measurable excitement around new launches and collaborations.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION POTENTIAL

High

Medium

Low

MATURITY STAGE

Emerging

Scaling

Established

MARKET SIZE

\$3.48B

by 2030

COMPLEMENTARY CHANNELS

Social commerce

Retail media

Influencer-led commerce

BEST FOR

Launches

Engagement

conversion

CORE KPI

View-to-purchase rate



INNOVATION OPPORTUNITIES

- Test exclusive drops through live events.
- Partner with creators to humanise the experience and drive conversion.
- Integrate real-time data to adapt pricing or offers during streams.



Case Study: Zara's Live Shopping Expansion

CHALLENGE:

To enhance Zara's digital shopping experience and strengthen engagement on its owned channels through real-time, interactive formats.

EXPERIMENT:

Zara launched influencer-led live shopping in China, streaming directly on its app and website. Its streams featured styling tips, live Q&A, and product drops, attracting 800,000+ viewers per stream.

OUTCOME:

The format has since expanded to the UK, Europe, and the US, boosting conversion rates, shortening purchase cycles, and increasing traffic to owned channels.

STRATEGIC TAKEAWAY:

Use live shopping to test new formats in-market, learn in real-time, and scale what drives conversion.



AI Shopping Assistants

Algorithms as personal shoppers

WHAT IS IT?

AI shopping assistants help consumers discover, compare, and buy products through personalised recommendations across apps, websites, and messaging platforms.

HOW HAS IT EVOLVED?

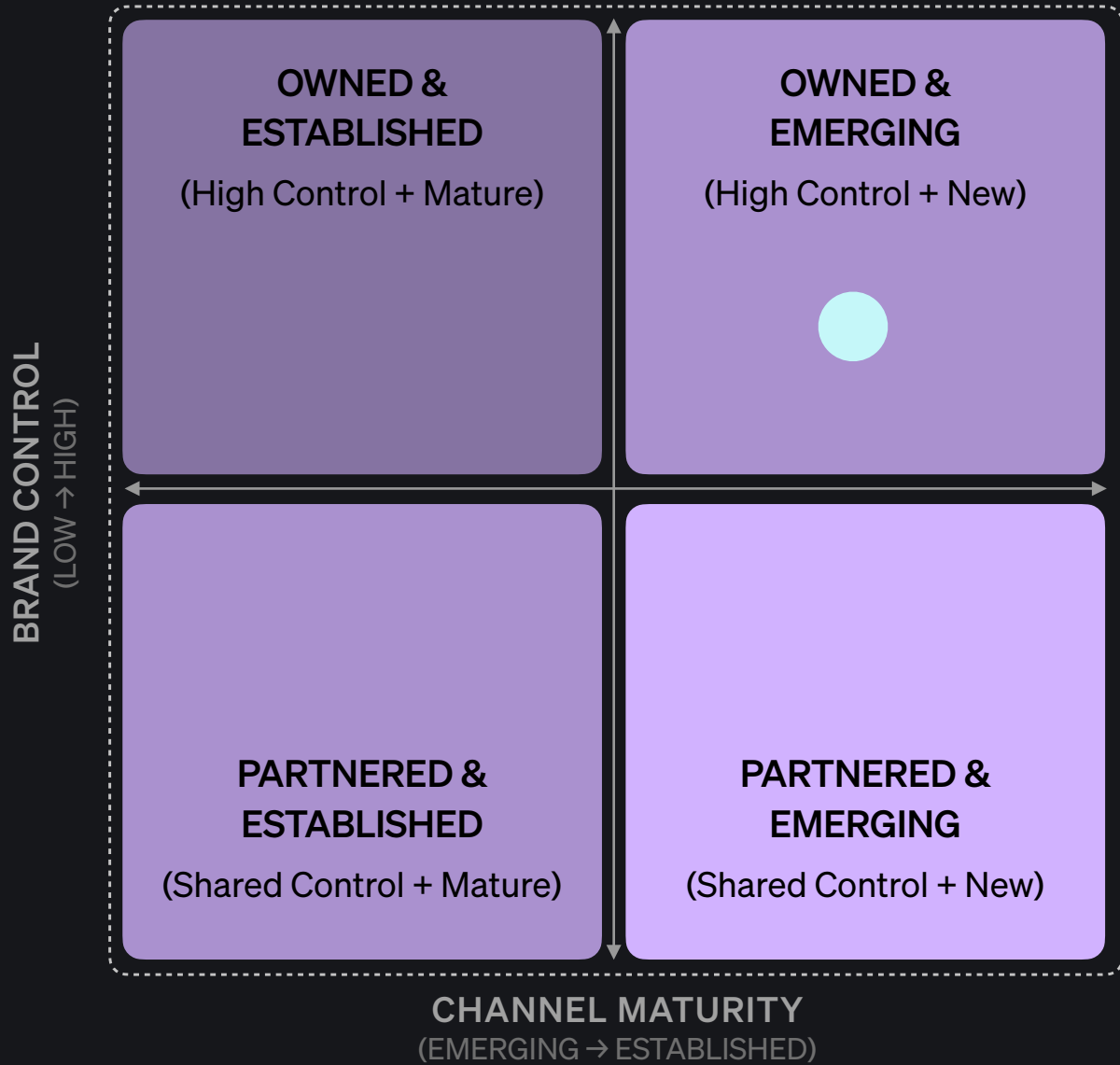
Evolved from scripted chatbots to generative tools capable of understanding context, preferences, and intent.

They now act as personal shoppers across retail, voice, and social channels, curating products, answering questions, and completing transactions.

WHY IT MATTERS

- Converts search intent into personalised product discovery.
- Enhances experience through instant, data-driven dialogue.
- Reduces friction in complex or high-consideration purchases.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION POTENTIAL

HighMediumLow

MATURITY STAGE

EmergingScalingEstablished

MARKET SIZE

\$37.45Bby 2034

COMPLEMENTARY CHANNELS

Branded appsRetail mediaVoice commerce

BEST FOR

PersonalisationDiscoveryConversion

CORE KPI

Conversion rateAverage order value



INNOVATION OPPORTUNITIES

- Train AI models on first-party data to improve recommendations.
- Integrate assistants into loyalty programs for smarter retention.
- Use chat data to refine product strategy and UX design.



Case Study: Walmart's AI Assistant, Sparky

CHALLENGE:

Take product discovery faster and more intuitive for everyday shoppers.

EXPERIMENT:

Walmart launched Sparky, an AI assistant to compare items, get review summaries and add to carts conversationally. Sparky will soon support voice, image, and video inputs for richer interactions.

OUTCOME:

Although still in its early stages, Sparky is reshaping how customers shop in the Walmart app, boosting engagement and streamlining discovery while building richer data for greater personalisation and AI-driven growth.

STRATEGIC TAKEAWAY:

Use AI shopping assistants to test Voice commerce, learn from shopper intent and scale data-driven personalisation across channels.

Hi, I'm Sparky!



Hi, Sam



Ask Sparky



Sparky is powered by AI. It may make mistakes or use data from outside Walmart. Never share personally sensitive info.

Hey Sam! I can help with all of your shopping needs. What are you looking for today?

What air fryer is good for a family of 5?

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Roundtables

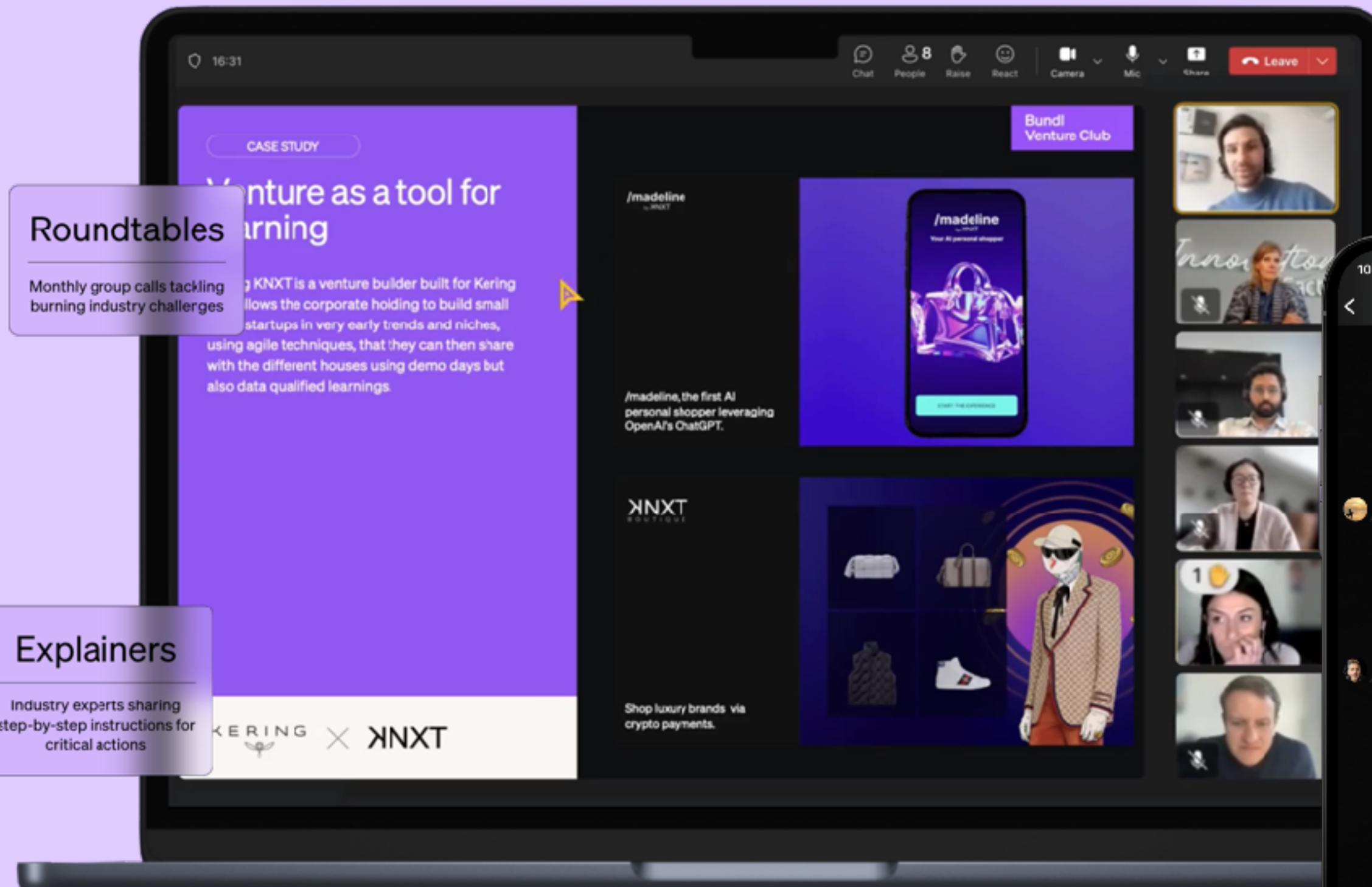
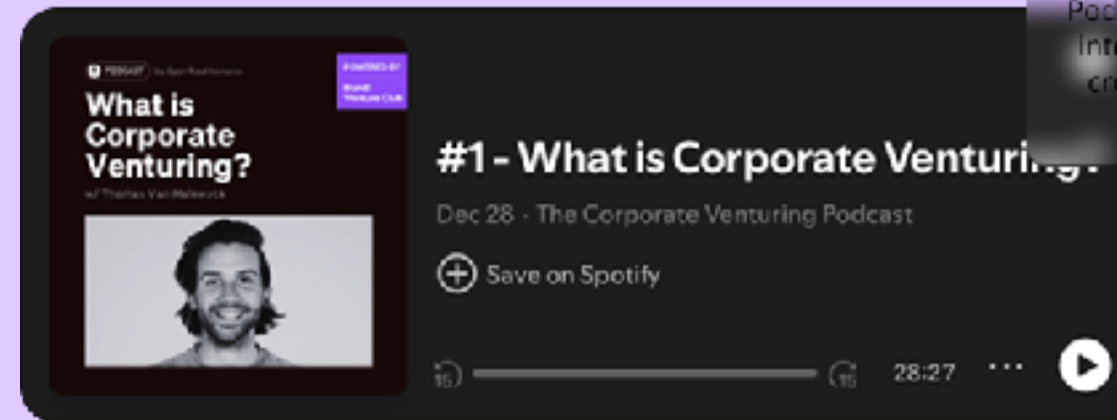
Monthly group calls tackling burning industry challenges

Explainers

Industry experts sharing step-by-step instructions for critical actions

Knowledge

Podcasts, reports, articles, interviews, frameworks - created for and by club members.



24/7 Support

A group designed for you to ask and get venturing support from experienced leaders.

Experience Channels

Retail as immersion and emotion

Pop-ups & Brand Events

From short-term activations to immersive brand ecosystems

WHAT IS IT?

Temporary physical activations designed to create buzz, test markets, drive engagement, and build emotional connections beyond traditional retail environments.

HOW HAS IT EVOLVED?

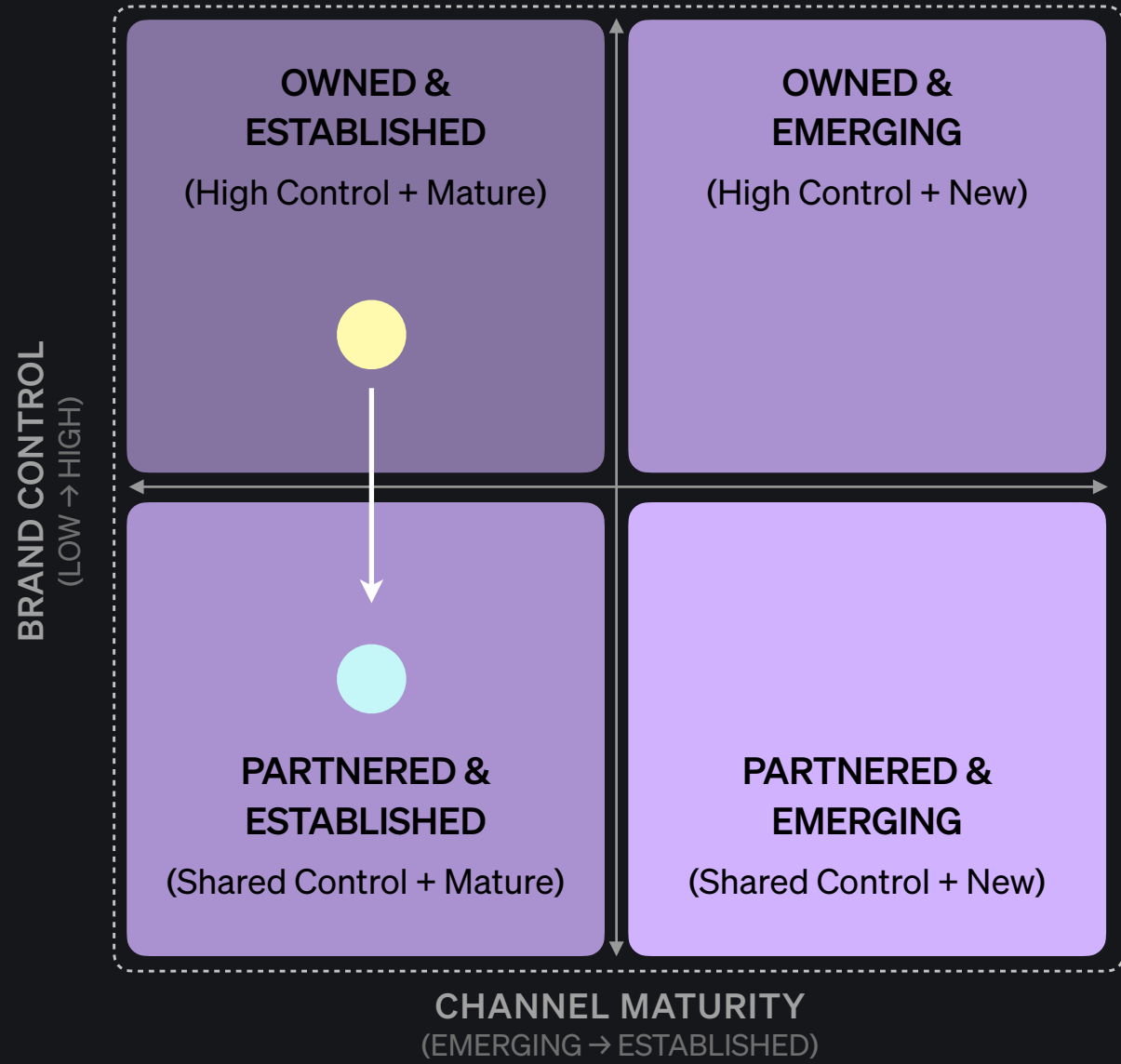
Pop-ups have evolved from discount outlets to immersive destinations that fuse retail, entertainment, and content.

Brands now use them as innovation labs to test ideas, capture live feedback, and amplify reach through social buzz.

WHY IT MATTERS

- Breaks through attention fatigue with tactile, memorable experiences.
- Generates high-signal data and rich UGC for ongoing campaigns.
- Enables market testing before full-scale rollout.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION POTENTIAL

HighMediumLow

MATURITY STAGE

EmergingScalingEstablished

MARKET SIZE

\$2.3T
by 2030

COMPLEMENTARY CHANNELS

Branded appsRetail mediaSocial commerceD2C

BEST FOR

LaunchesCommunity buildingZero/first-party data

CORE KPI

Lead captureEvent-driven conversion rate



INNOVATION OPPORTUNITIES

- Use AR try-ons, QR, and live streaming to extend reach.
- Host co-creation events to turn customers into ambassadors.
- Capture data through mobile check-ins and interactive displays.



Case Study: Levi's “Authenticity” Pop-ups

CHALLENGE:

Rebuild relevance with Gen Z and millennial audiences globally while reinforcing Levi's denim leadership in markets dominated by fast fashion and cultural fragmentation.

EXPERIMENT:

Rolled out the “Authenticity” pop-up series globally in 2024-25. Blended craftsmanship, customisation, and culture with premium collections, artisan tailoring, and local music. Celebrity previews drove global buzz and UGC.

OUTCOME:

Drove global engagement and cultural buzz. Seoul alone drew 25,000+ visitors and hit #6 in Korea's “buzz brands” cementing Levi's youth relevance and brand affinity.

STRATEGIC TAKEAWAY:

Pop-ups now scale global storytelling through local culture, turning short-term retail into lasting community impact.



Flagship Experience Stores

From retail spaces to immersive brand experiences

WHAT IS IT?

Immersive brand spaces that merge storytelling, tech, and community to drive loyalty and data-led engagement.

HOW HAS IT EVOLVED?

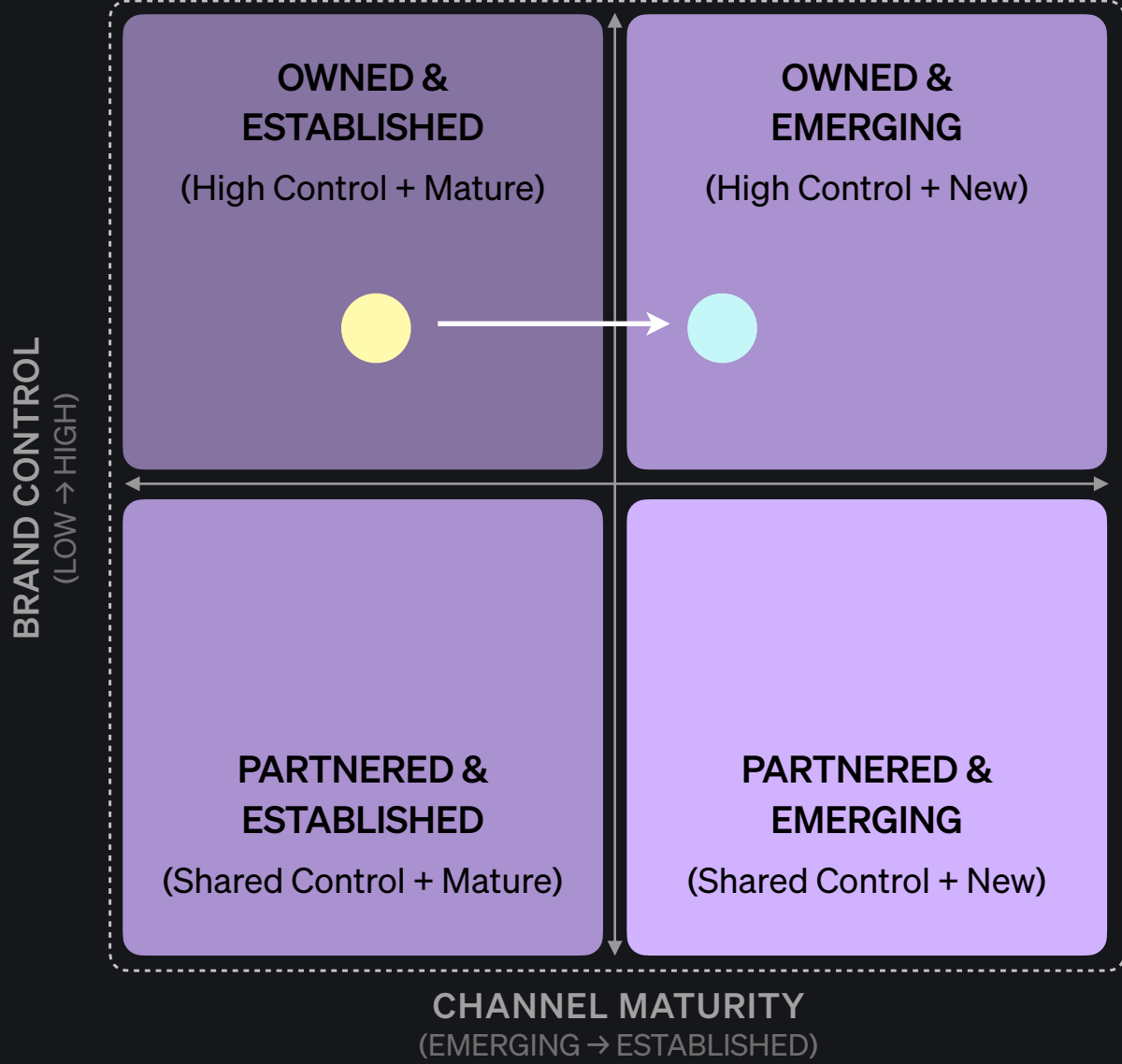
Flagship experience stores now serve as innovation hubs where brands test new formats, technologies, and customer experiences.

They're data-driven, integrating AR, AI, and connected devices to personalise interactions and measure behaviour in real time.

WHY IT MATTERS

- Deepens brand connection through immersive, multi-sensory experiences.
- Links physical presence with digital data and membership growth.
- Acts as a controlled environment to pilot new retail technologies.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION
POTENTIAL

High

Medium

Low

MATURITY
STAGE

Emerging

Scaling

Established

MARKET
SIZE

\$543.45B
by 2035

COMPLEMENTARY
CHANNELS

Brand apps

Pop-up stores

D2C

BEST
FOR

Immersion

Loyalty

Brand storytelling

CORE
KPI

Dwell time

Conversion rate

Social sharing



INNOVATION OPPORTUNITIES

- Use stores as R&D hubs to test new experiences and tech.
- Integrate digital layers like AR and apps to extend dwell time.
- Capture customer data to inform product design and marketing.



Case Study: 113Spring's New Flagship

CHALLENGE:

Reimagine retail as a lifestyle destination, blending beauty, wellness, and community to move from transactional to experiential.

EXPERIMENT:

An experiential flagship combining new curated products, treatments, and events, designed as a living lab to test formats and capture direct insights into consumer futures.

OUTCOME:

Acts as a real-world lab, generating insights that guide new products, services, and experience rollouts across the brand.

STRATEGIC TAKEAWAY:

Use flagship stores to pilot new experiences, validate conversion levers, and scale proven models across your ecosystem.



AR/VR Shopping Environments

From static browsing to immersive, interactive retail

WHAT IS IT?

Environments that let customers explore, customise, and buy products in 3D virtual spaces, bridging physical and digital retail to boost confidence and conversion.

HOW HAS IT EVOLVED?

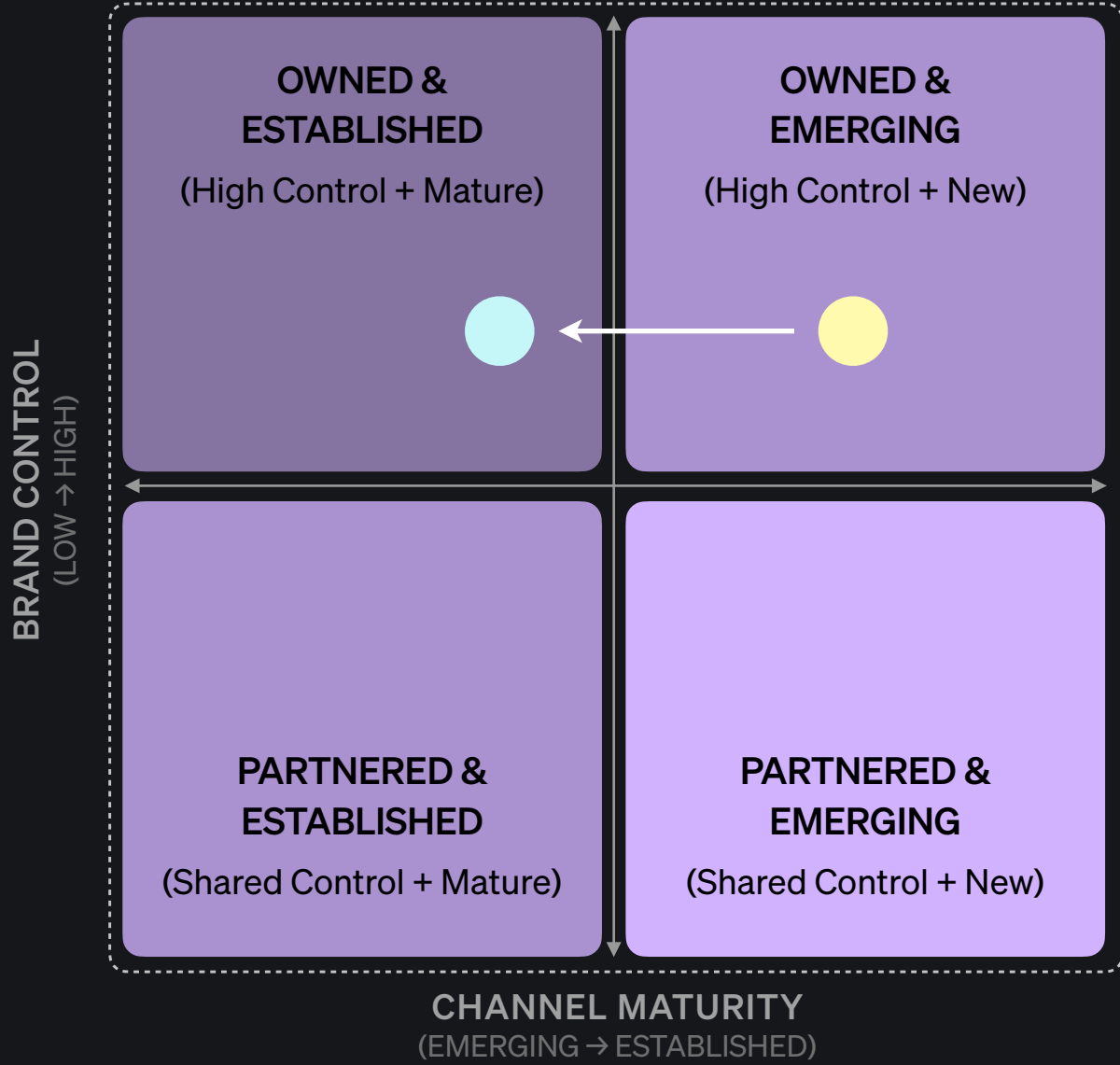
AR/VR has become a core commerce tool as mobile devices and headsets improve.

Brands now use it to enable virtual try-ons, interactive showrooms, and spatial product demos that merge inspiration with transaction.

WHY IT MATTERS

- Builds consumer confidence by simulating real-life experiences.
- Reduces return rates through accurate visualisation.
- Creates new storytelling and customisation opportunities.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION POTENTIAL	High	Medium	Low
MATURITY STAGE	Emerging	Scaling	Established
MARKET SIZE	\$96.32B by 2029		
COMPLEMENTARY CHANNELS	Flagship stores	Retail media	D2C
BEST FOR	Conversion confidence	Reduced returns	
CORE KPI	Engagement duration	Conversion uplift	



INNOVATION OPPORTUNITIES

- Develop virtual stores for new product launches or limited drops.
- Use AR try-ons to bridge in-store and online journeys.
- Combine AI and spatial commerce for personalised, immersive discovery.



Case Study: Lowe's "Style Studio" on Apple Vision Pro

CHALLENGE:

Increase confidence and conversion on big-ticket kitchen projects by letting customers "see" designs before they buy.

EXPERIMENT:

Lowe's launched Style Studio on Apple Vision Pro, enabling shoppers step into a spatial kitchen, browse curated styles, swap cabinets, counters and finishes, then save and share project boards.

OUTCOME:

Style Studio boosted engagement and purchase intent for kitchen remodels, increased value through bundled selections, and positioned Lowe's as an early leader in spatial commerce.

STRATEGIC TAKEAWAY:

Leverage AR/VR to simplify complex purchases, showcase value, and position your brand at the forefront of spatial commerce.



Immersive & Gaming Commerce

From branded skins to full-scale virtual economies

WHAT IS IT?

Integrates branded experiences, virtual goods, and real-world transactions inside digital worlds and gaming platforms.

HOW HAS IT EVOLVED?

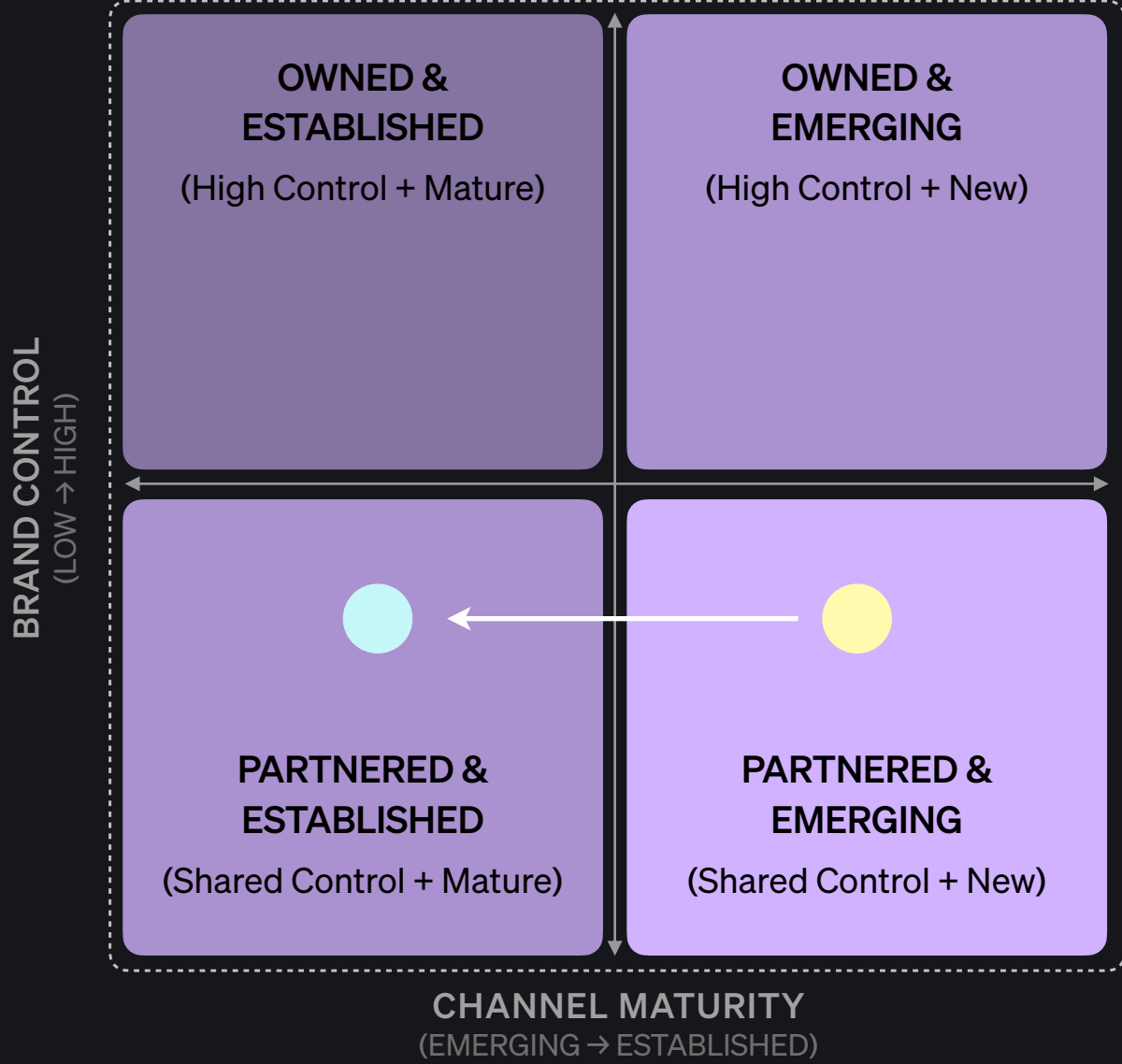
What started as branded skins and sponsorships has evolved into full-scale virtual economies.

Major brands now co-create worlds, events, and products, connecting digital and physical value across platforms like Roblox, Fortnite, and emerging metaverse spaces.

WHY IT MATTERS

- Engages hard-to-reach Gen Z and Gen Alpha audiences.
- Creates new revenue streams through digital products.
- Builds brand communities inside high-attention environments.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION POTENTIAL	High	Medium	Low
MATURITY STAGE	Emerging	Scaling	Established
MARKET SIZE	\$535.29B by 2033		
COMPLEMENTARY CHANNELS	social commerce AR/VR Influencer-led commerce		
BEST FOR	Engagement	Brand affinity	Youth markets
CORE KPI	Experience-to-purchase conversion		



INNOVATION OPPORTUNITIES

- Partner with game studios to test branded worlds or virtual goods.
- Launch limited drops linking in-game items to real-world offerings.
- Use gaming spaces for live events, storytelling and testing.



Case Study: Nike's Airphoria Launch on Fortnite

CHALLENGE:

Reignite youth engagement and connect digital fandom to real-world sneaker sales.

EXPERIMENT:

Nike launched Airphoria Vol. 2 inside Fortnite to promote the Air Max Dn. Players explored a custom island, unlocked Nike-branded cosmetics, and linked in-game missions to early product access through nike.com and the SNKRS app.

OUTCOME:

The collaboration boosted launch visibility and Nike's digital community engagement, generating measurable traffic spikes to SNKRS. It reinforced gaming as a conversion channel and creative testing ground for future drops.

STRATEGIC TAKEAWAY:

Use gaming commerce to turn brand fandom into measurable demand and test how digital experiences drive real-world sales.



Convenience Channels

Removing friction across the buying journey

Quick Commerce / Instant Delivery

From instant delivery to predictive, connected commerce

WHAT IS IT?

Quick commerce enables on-demand delivery of products through localised fulfilment centres, real-time inventory, and courier networks.

HOW HAS IT EVOLVED?

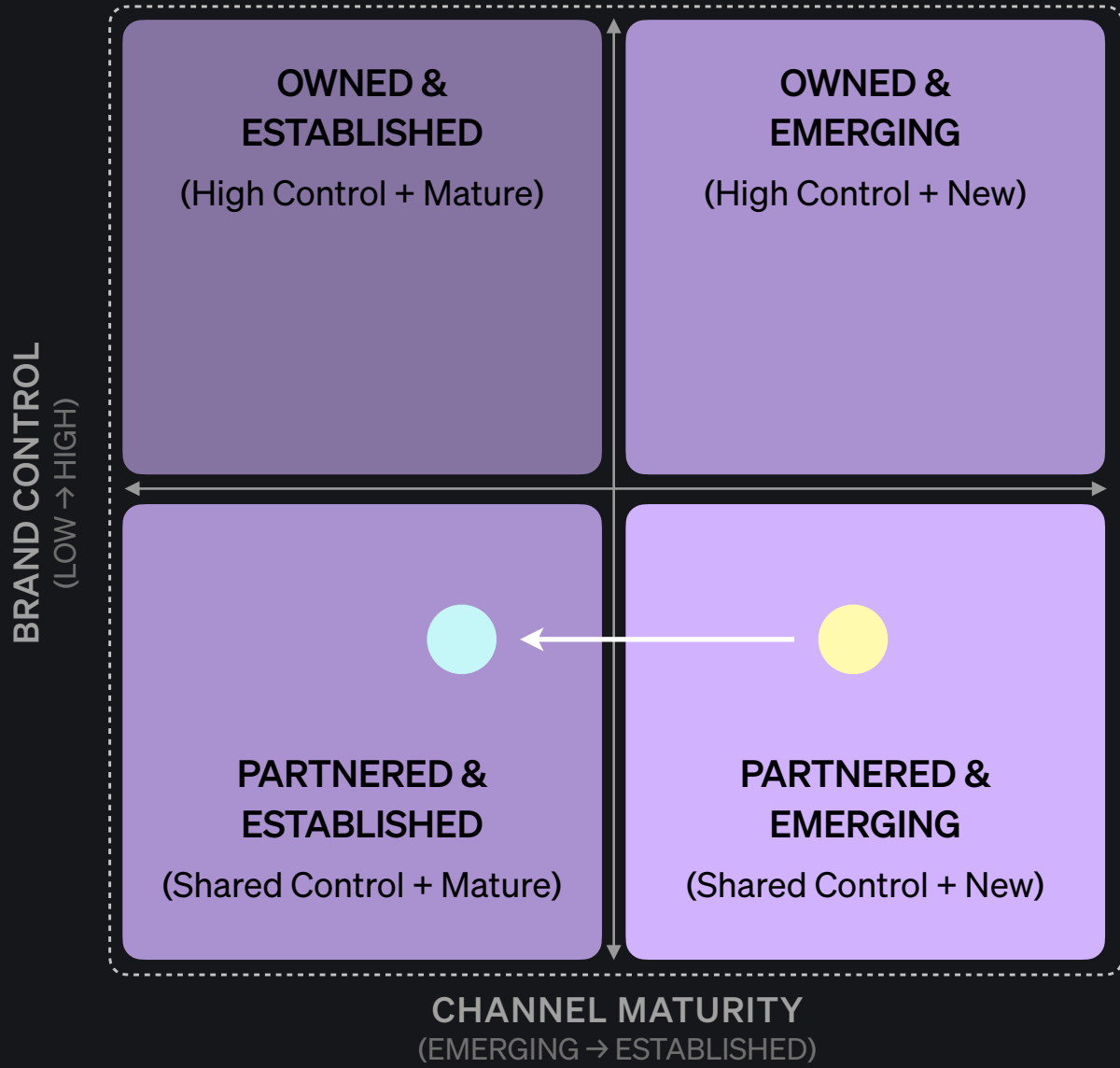
Quick commerce started with groceries and essentials but now spans beauty, pharmacy, electronics and more.

Retailers are building hybrid models that blend dark stores, local partnerships, and predictive logistics to improve margins and speed.

WHY IT MATTERS

- Builds always-on customer relationships through instant gratification.
- Turns fulfilment into a data-rich engagement touchpoint.
- Boosts loyalty by linking delivery to personalised offers and memberships.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION POTENTIAL	High	Medium	Low
MATURITY STAGE	Emerging	Scaling	Established
MARKET SIZE	\$337.59B by 2032		
COMPLEMENTARY CHANNELS	Retail media	Branded apps	Subscription services
BEST FOR	Loyalty activation	Retention	first-party data
CORE KPI	Delivery time	Repeat order rate	



INNOVATION OPPORTUNITIES

- Integrate predictive ordering to anticipate customer needs.
- Partner with local networks to expand last-mile coverage efficiently.
- Link instant delivery to loyalty rewards and brand apps.



Case Study: Tesco's Whoosh Rapid Delivery

CHALLENGE:

Increase convenience, basket size, and loyalty by making near-instant delivery a core service.

EXPERIMENT:

Store-to-door grocery delivery service within 60 minutes. After pilot, they scaled across the UK, extending coverage to 1,500+ stores, and integrating with Deliveroo's new white-label Express for trials in Ireland.

OUTCOME:

Whoosh doubled sales impact year over year, active customers rose 48%, and basket sizes increased as the range expanded. Positioning shifted from niche speed play to a mainstream convenience driver.

STRATEGIC TAKEAWAY:

Pilot in dense urban areas, then scale SKU range to shift from emergency orders to habitual, high-value baskets.



Voice & Conversational Commerce

From smart speakers to multimodal ecosystems

WHAT IS IT?

Voice commerce lets customers search, compare, and buy products through spoken or typed interactions across devices, apps, and messaging platforms.

HOW HAS IT EVOLVED?

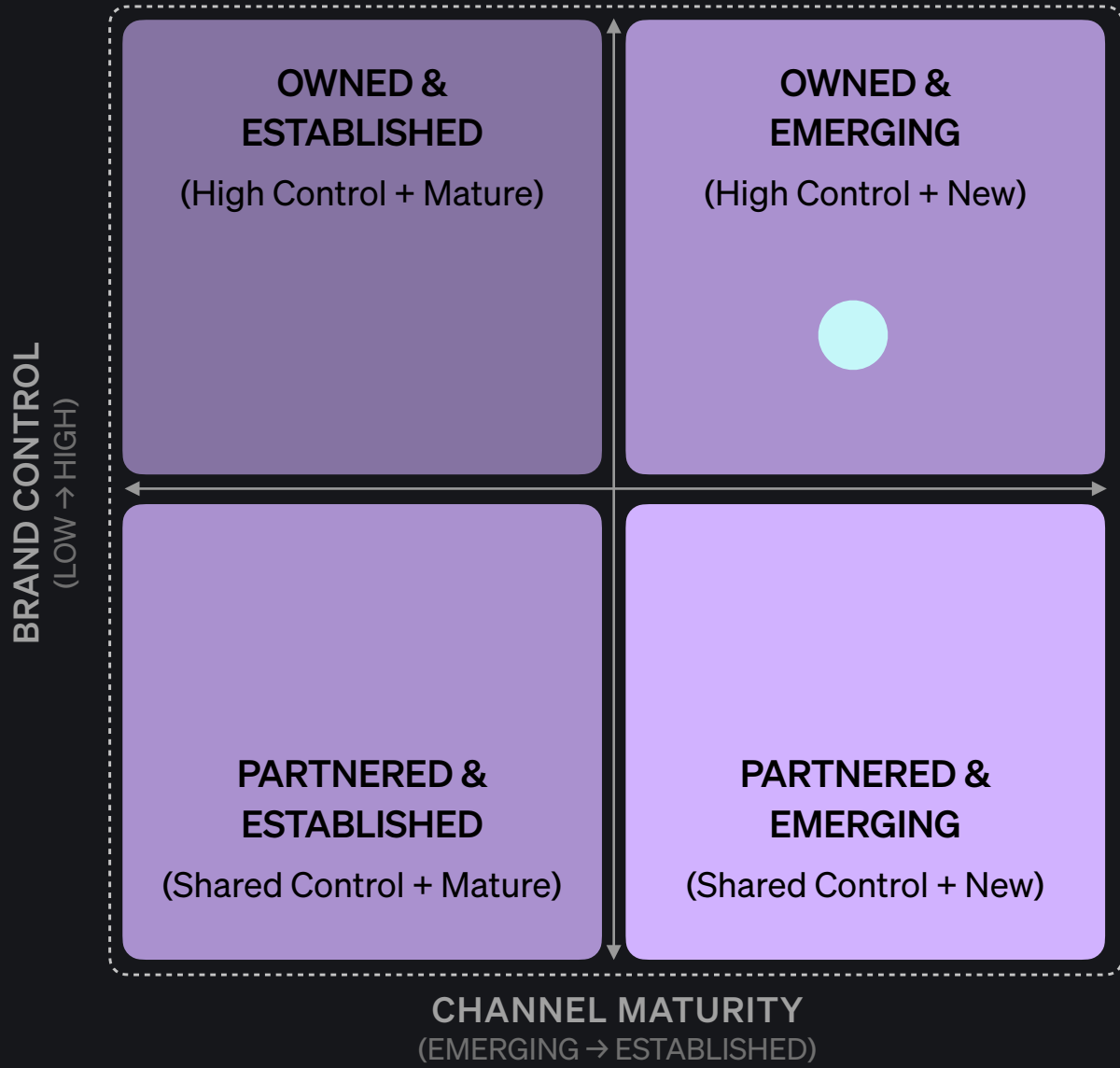
AI and natural language processing are enabling more natural and intuitive conversations between consumers and devices.

It’s now embedded in apps, cars, and retail platforms, combining voice, text, and visual interfaces for richer, frictionless transactions.

WHY IT MATTERS

- Turns voice into a measurable conversion and retention driver.
- Collects rich behavioural data for personalisation.
- Increases frequency and convenience for repeat orders.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION POTENTIAL

HighMediumLow

MATURITY STAGE

EmergingScalingEstablished

MARKET SIZE

\$186.28B
by 2030

COMPLEMENTARY CHANNELS

AI assistantsRetail mediaSubscriptions

BEST FOR

EngagementRetentionPersonalisation

CORE KPI

Conversion rates



INNOVATION OPPORTUNITIES

- Add voice assistants to brand apps for reordering and service.
- Use AI to personalise offers and recommendations in real time.
- Link conversational journeys to CRM systems for unified data capture.



Case Study: Amazon's Alexa+ Launch

CHALLENGE:

Make voice commerce useful at scale and convert assistant engagement into measurable shopping behaviour.

EXPERIMENT:

Amazon launched Alexa+, enabling shoppers to compare products, get recommendations, and place or reorder items by voice across Echo devices and the Amazon app.

OUTCOME:

Early adoption showed higher reorder rates and more bundled purchases, while strengthening Amazon's position in AI-driven retail.

STRATEGIC TAKEAWAY:

Use conversational AI to turn daily interactions into seamless purchase moments that build loyalty and repeat sales.

“Alexa, please order toothpaste and carrots for same-day delivery.”



Subscription and Auto-replenishment

From recurring delivery to predictive relationships

WHAT IS IT?

Customers pay a recurring fee for ongoing access to products or services. This model turns one-time buyers into loyal members.

HOW HAS IT EVOLVED?

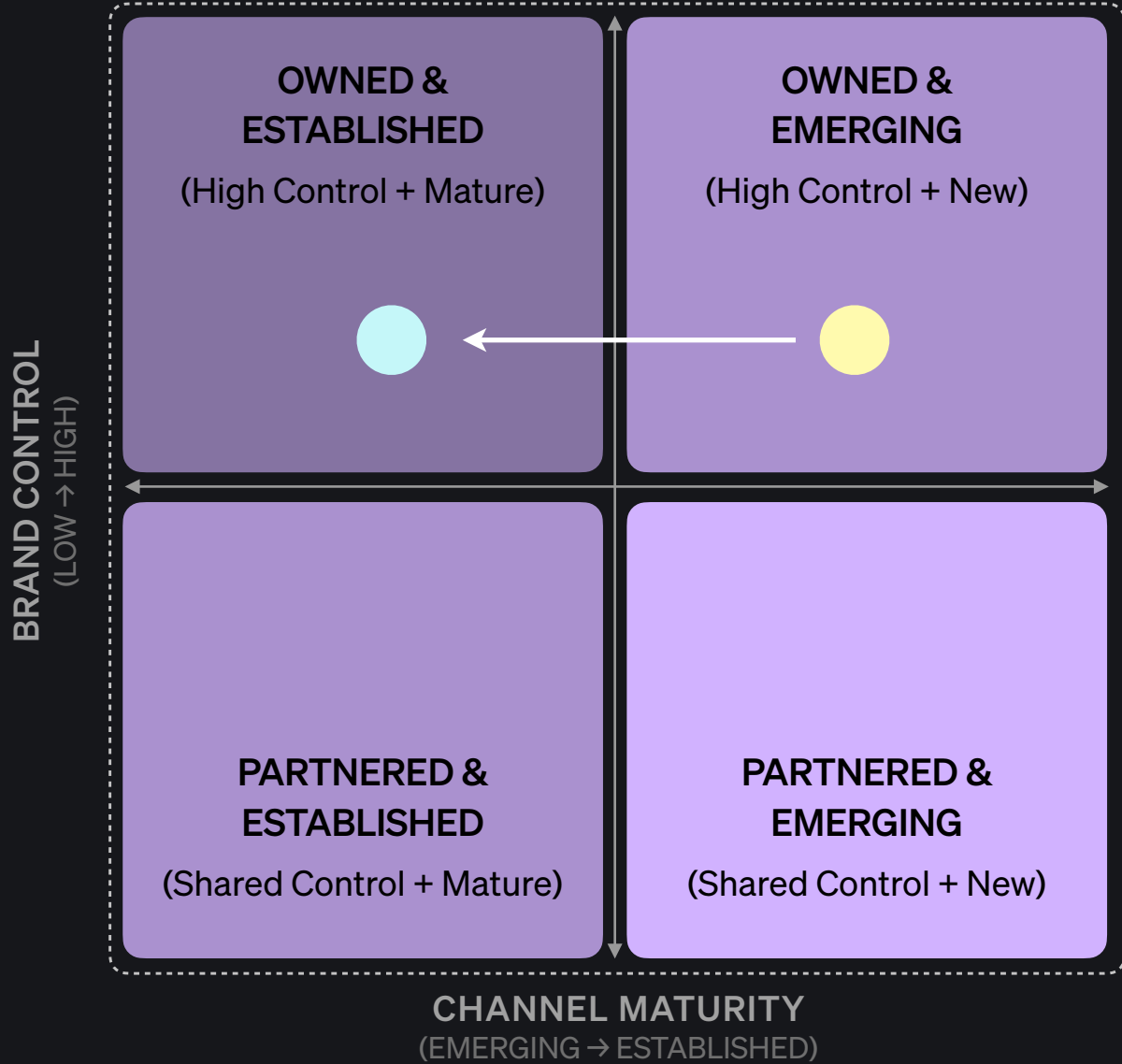
Subscriptions have evolved from basic delivery services to adaptive systems that predict timing, adjust quantities, and integrate with loyalty programs for personalised engagement.

Top brands use tiered perks and smart pricing to drive retention and recurring growth.

WHY IT MATTERS

- Builds predictable revenue and customer lifetime value.
- Captures deep behavioural data through repeat interactions.
- Turns convenience into loyalty through ongoing engagement. Builds predictable revenue and customer lifetime value.
- Turns convenience into loyalty through ongoing engagement.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION POTENTIAL

HighMediumLow

MATURITY STAGE

EmergingScalingEstablished

MARKET SIZE

\$1.51Tby 2033

COMPLEMENTARY CHANNELS

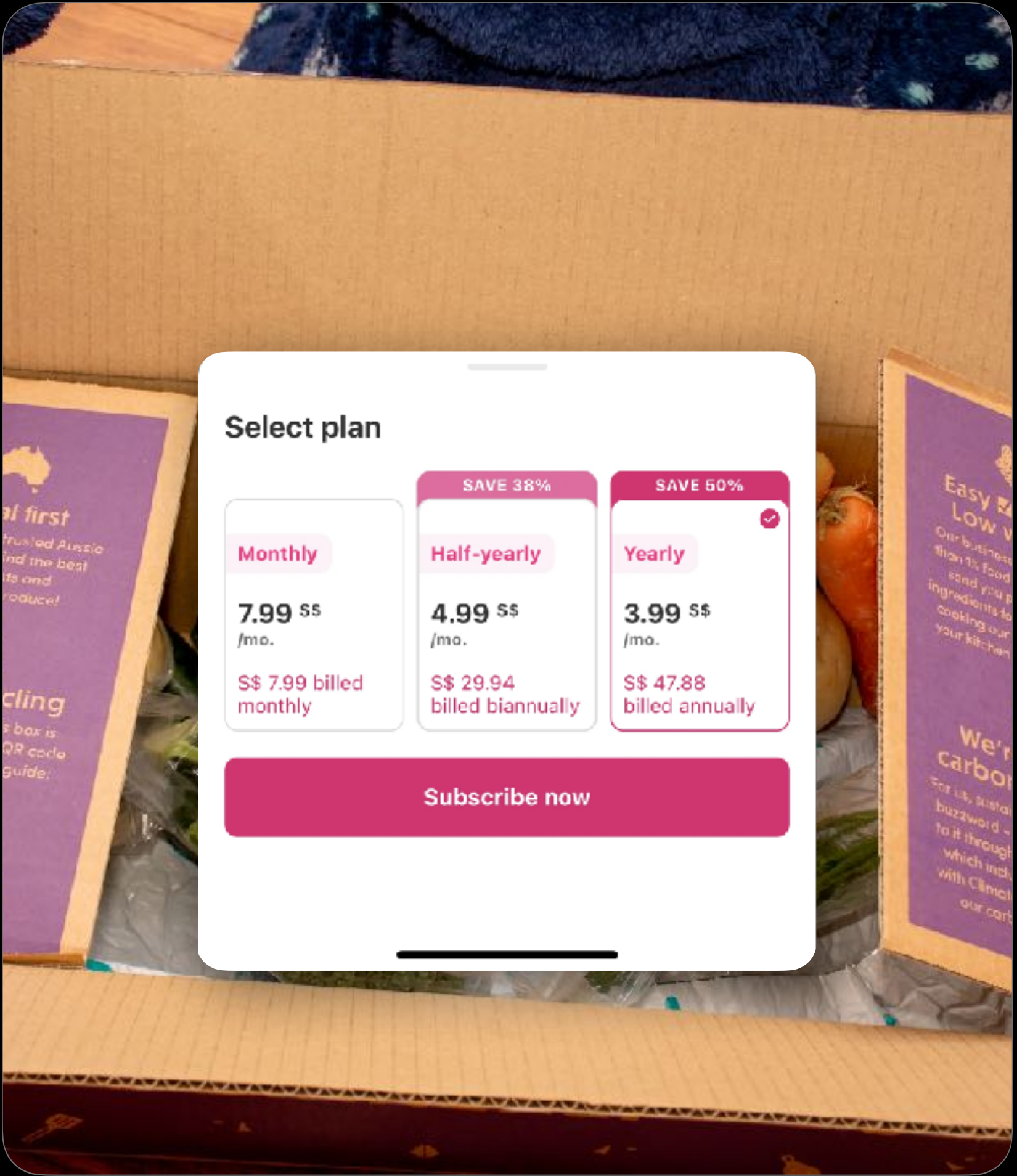
AI assistantsRetail mediaD2C

BEST FOR

RetentionRecurring revenueFirst-party data

CORE KPI

Churn rateLifetime valueOrder frequency



INNOVATION OPPORTUNITIES

- Use AI to trigger replenishment based on usage signals.
- Bundle subscriptions with loyalty tiers for ecosystem stickiness.
- Expand into non-traditional categories (e.g., apparel care, pet wellness).



Case Study: Prime's Membership Reinvention

CHALLENGE:

Amazon needed to strengthen Prime's value proposition amid rising costs and subscription fatigue.

EXPERIMENT:

Prime added new membership perks, including free Grubhub+, RxPass for meds and auto-refills, fuel discounts and Prime Video ads with a paid ad-free tier.

OUTCOME:

Prime evolved from shipping and streaming to a daily utility bundle spanning delivery, healthcare, and entertainment. It deepened loyalty, drove adoption, and unlocked new revenue.

STRATEGIC TAKEAWAY:

Use memberships to bundle third-party services, monetise attention with ads, and anchor replenishment perks to lift retention and LTV.



Hybrid Click & Collect

From simple pickups to omnichannel fulfilment

WHAT IS IT?

Online ordering with in-store, curbside, or locker pickup that blends digital convenience with immediate collection.

HOW HAS IT EVOLVED?

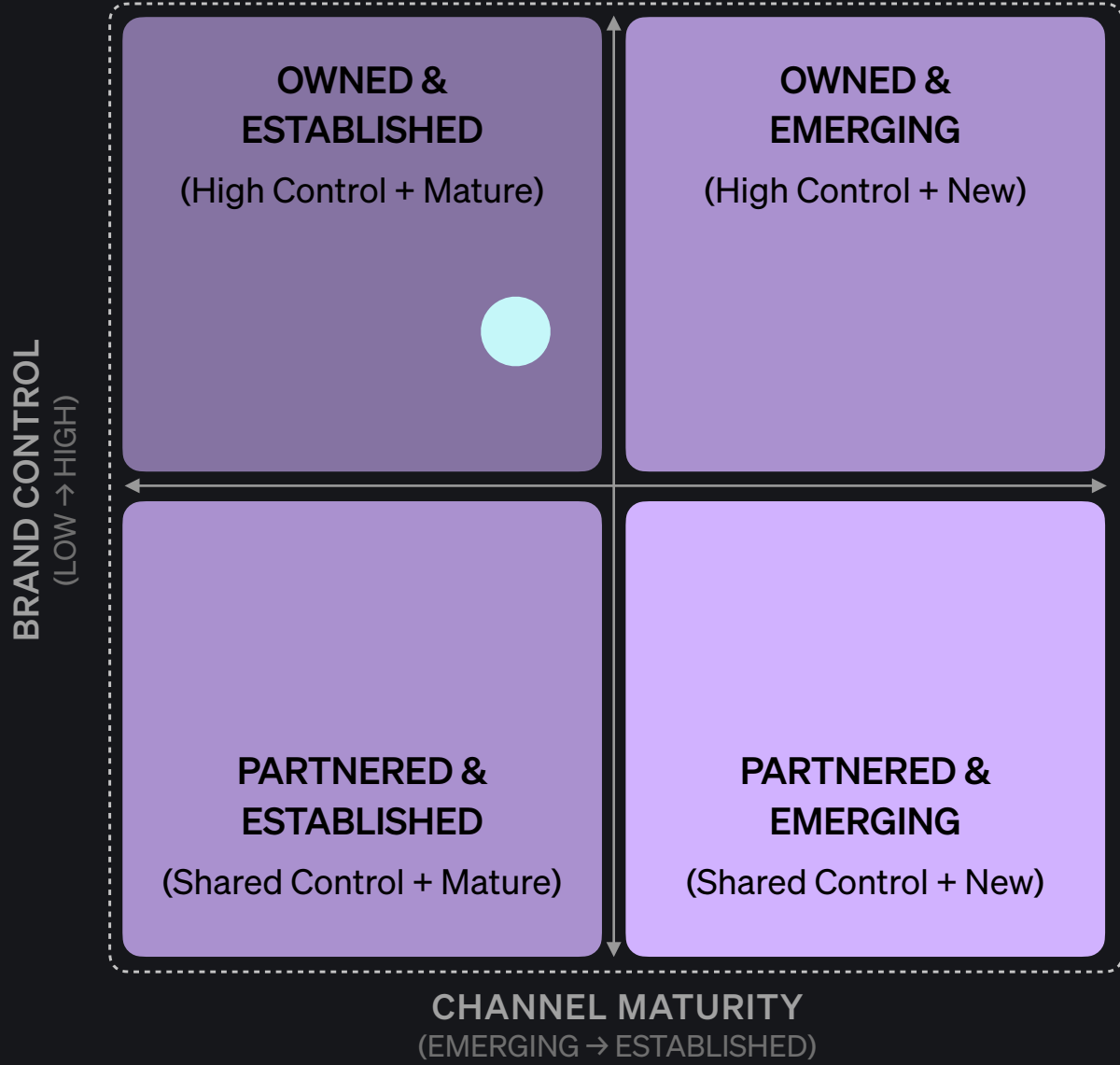
Click & Collect has moved beyond simple pickup to full hybrid fulfilment.

Stores now act as micro-fulfilment hubs with live inventory, instant pickup, and curbside/locker returns.

WHY IT MATTERS

- Cuts last-mile costs and improves margins.
- Raises pickup conversion and app sign-ins.
- Creates upsell moments at collection.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION POTENTIAL	High	Medium	Low
MATURITY STAGE	Emerging	Scaling	Established
MARKET SIZE	\$1.51T by 2033		
COMPLEMENTARY CHANNELS	Branded appsSubscriptionsQuick commerceD2C		
BEST FOR	Loyalty activationCross-sellingOmnichannel engagement		
CORE KPI	Conversion rateRepeat visits		



INNOVATION OPPORTUNITIES

- Use AI to route orders dynamically across stores and partners.
- Expand options with lockers and curbside; and offer instant returns.
- Personalise pickup moments with real-time offers or loyalty tie-ins.



Case Study: IKEA's Hybrid Click & Collect Expansion

CHALLENGE:

Increase urban access and convenience without building full-size stores. Reduce last-mile costs while keeping brand control.

EXPERIMENT:

Expanded Plan & Order with Pick-up sites in the US, piloted next-gen automated pick-up lockers at Tesco sites, rolled out UK mobile pick-up points and launched 24/7 pick-up lockers in Finland.

OUTCOME:

Broader coverage and 24/7 pickup boosted online growth. In the UK, online sales reached about 40% and customer approval hit 91%.

STRATEGIC TAKEAWAY:

Combine partner sites and 24/7 lockers with owned apps and centers, then grow formats that boost satisfaction and online share.



CLUSTER 4

Community Channels

Commerce as belonging and participation

Recommerce, rental, & resale platforms

From one-time ownership to circular consumption

WHAT IS IT?

Buying, renting or selling pre-owned goods through online marketplaces, peer-to-peer platforms, brand-owned programs, rental services, and refurbishment.

HOW HAS IT EVOLVED?

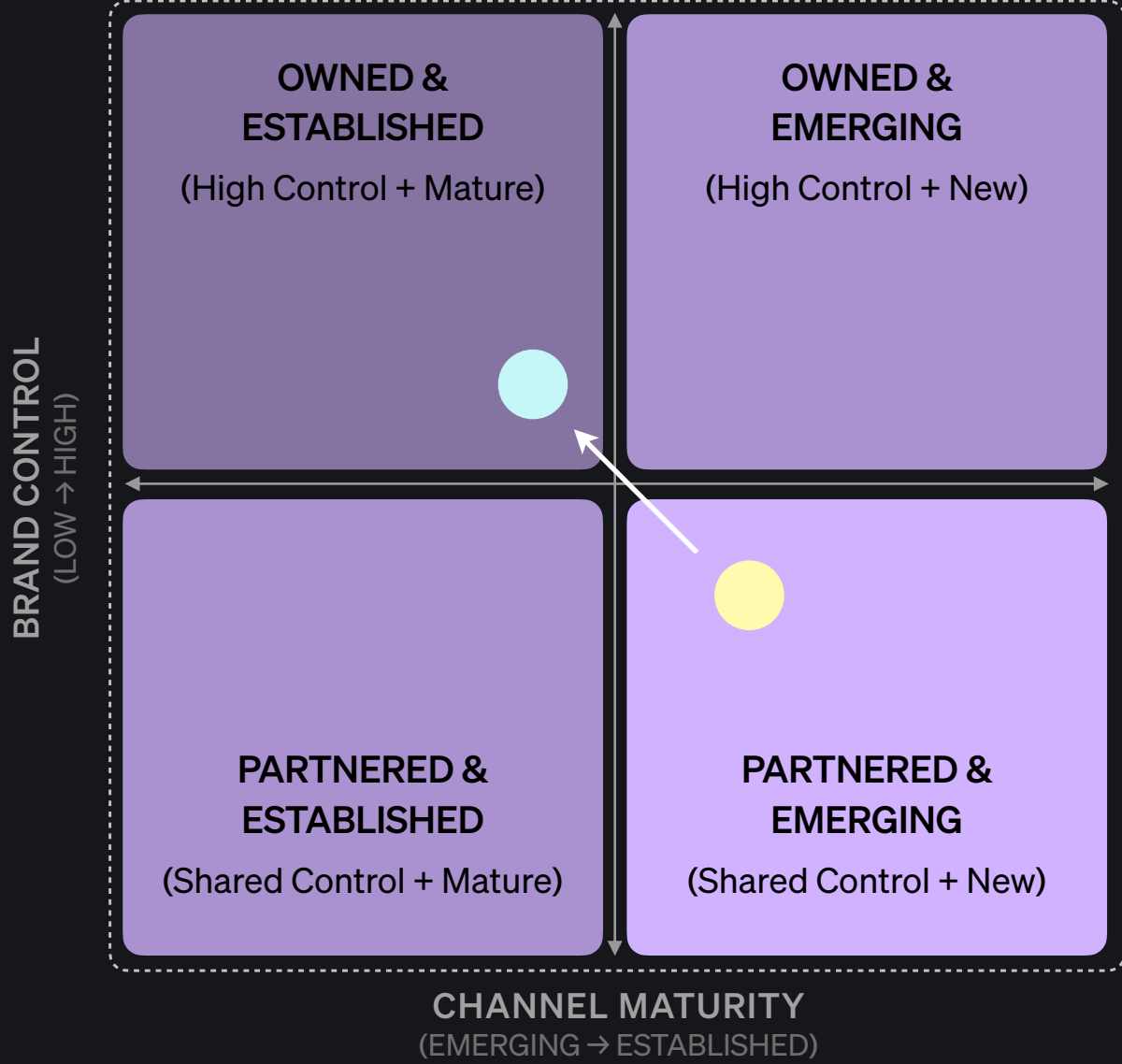
What began as peer-to-peer resale is now brand-led and integrated into core retail ecosystems.

Companies use authentication, refurbishment, and loyalty tie-ins to boost trust, margins, and sustainability impact.

WHY IT MATTERS

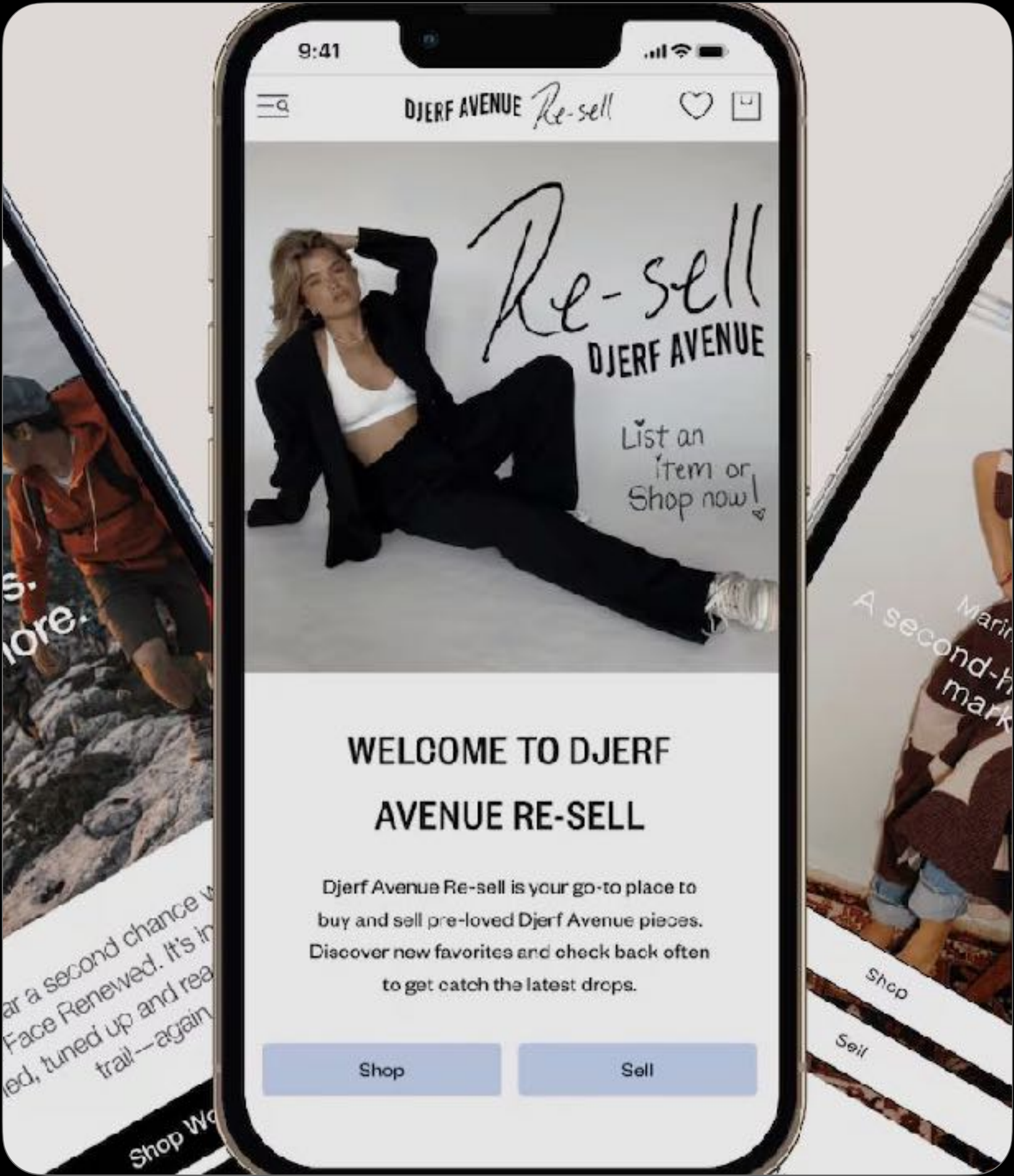
- Extends brand relationship beyond the first sale.
- Drives sustainability-led loyalty and circular credibility.
- Attracts younger consumers seeking affordable, purpose-driven options.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT

INNOVATION POTENTIAL	High	Medium	Low
MATURITY STAGE	Emerging	Scaling	Established
MARKET SIZE	\$289.76B by 2030		
COMPLEMENTARY CHANNELS	Branded apps D2C Sustainability programs		
BEST FOR	Loyalty New revenue Sustainability positioning		
CORE KPI	Resale margin	Customer reactivation rate	



INNOVATION OPPORTUNITIES

- Embed resale within owned apps to retain control and data.
- Use AI for authentication, pricing, and matching.
- Launch rental or trade-in models that feed into new product lines.



Case Study: Decathlon's Recommerce Scale-Up

CHALLENGE:

Make resale and rental profitable at scale while expanding access and reducing waste.

EXPERIMENT:

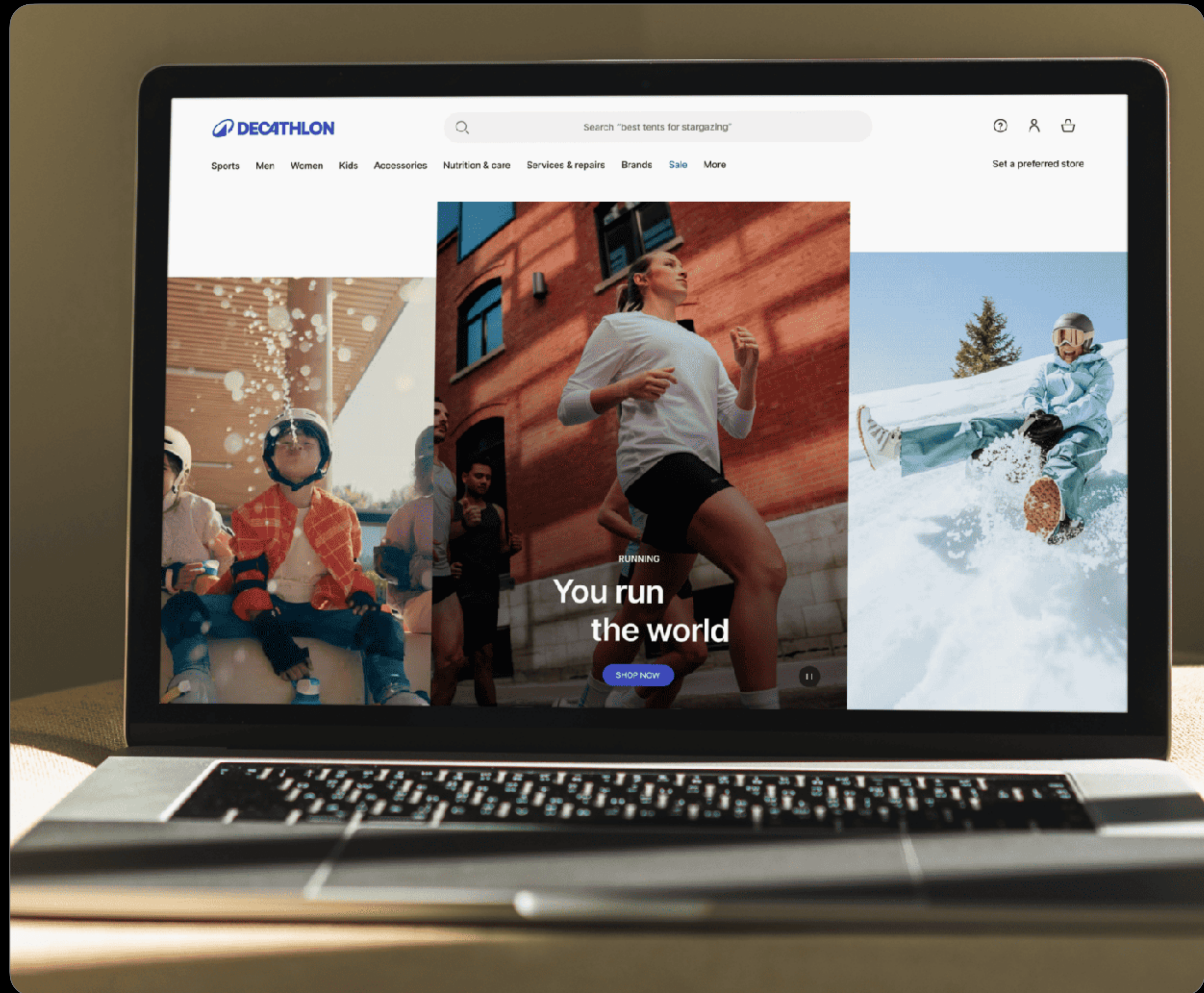
Decathlon built on early re-commerce, rental, and buyback pilots, turning them into a core business pillar. These services now run across markets (e.g. sports gear, e-bikes, and tents) through local repair hubs, digital trade-ins, and app-based rentals, making reuse a seamless part of the shopping journey.

OUTCOME:

Circular sales rose 27% in 2024, customer access widened across categories, and the model now targets 10% of revenue from circular services, aligning growth with B-Corp recertification and new ESG standards.

STRATEGIC TAKEAWAY:

Use re-commerce to turn sustainability demand and regulation pressure into new revenue, stronger margins, and lasting brand relevance.



Branded niche-media

From brand storytelling to owned audience ecosystems

WHAT IS IT?

Branded niche media are owned content platforms like podcasts, newsletters, and communities, built to attract and engage specific audiences beyond direct sales.

HOW HAS IT EVOLVED?

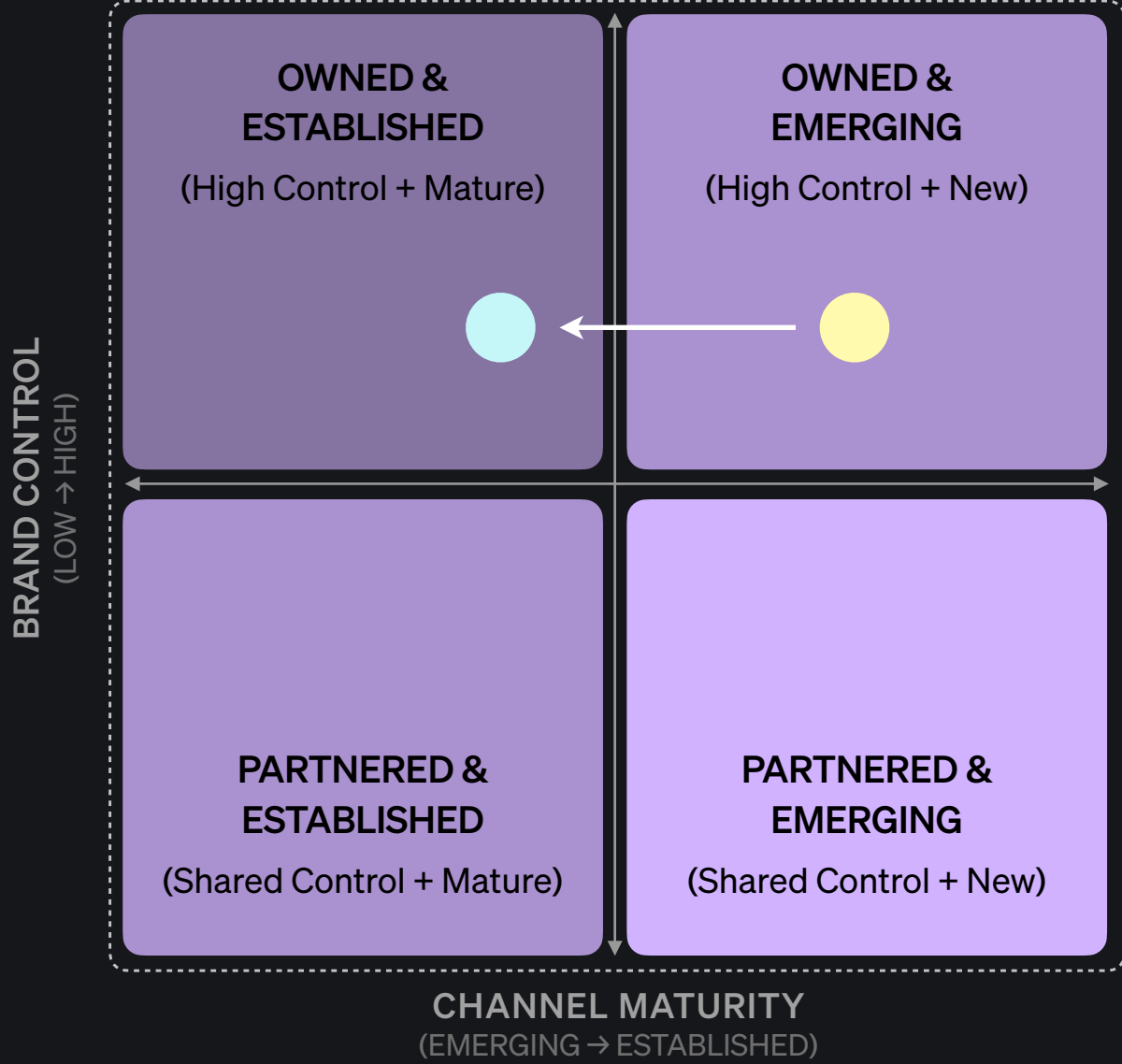
Once a marketing tool for awareness, branded media now operates as an independent growth channel.

Brands invest in editorial teams, data-driven content, and platform diversification to build trust, capture first-party data, and monetise engagement.

WHY IT MATTERS

- Reduces reliance on paid media and third-party algorithms.
- Builds authority and trust through consistent value delivery.
- Turns brand voice into a profit and loyalty driver.

CHANNEL POSITIONING MATRIX



INNOVATION
POTENTIAL

High

Medium

Low

MATURITY
STAGE

Emerging

Scaling

Established

MARKET
SIZE

\$1.96T
by 2032

COMPLEMENTARY
CHANNELS

Brand communities

Social commerce

D2C

BEST
FOR

Loyalty

First-party data

Thought leadership

CORE
KPI

Engagement rate

Subscriber growth

Conversion from content



INNOVATION OPPORTUNITIES

- Create niche communities around shared passions or lifestyles.
- Use content data to shape product development and campaigns.
- Monetise through ads, subscriptions, or exclusive experiences.

Case Study: Red Bull's Niche-Media Ecosystem

CHALLENGE:

Sustain growth in a crowded beverage market by building direct, high-affinity audience reach outside paid media.

EXPERIMENT:

Red Bull creates nonstop niche content in extreme sports, music, and adventure across YouTube, Instagram, TikTok, and owned platforms. Content blends athlete partnerships and series programming designed for repeat engagement.

OUTCOME:

Owned media delivers massive scale: 25M+ YouTube subscribers, 22B+ views, and 30M Instagram followers (2025). Record 2024 profits show how owned content now drives both brand equity and sales growth.

STRATEGIC TAKEAWAY:

Use branded niche media to build owned audiences that lower dependency on paid reach, generate first-party data, and convert cultural relevance into durable demand.



Group Commerce

From individual checkouts to collective buying power

WHAT IS IT?

Group commerce lets consumers unlock better prices or exclusives by purchasing together. It blends social trust and shared incentives to boost engagement and sales.

HOW HAS IT EVOLVED?

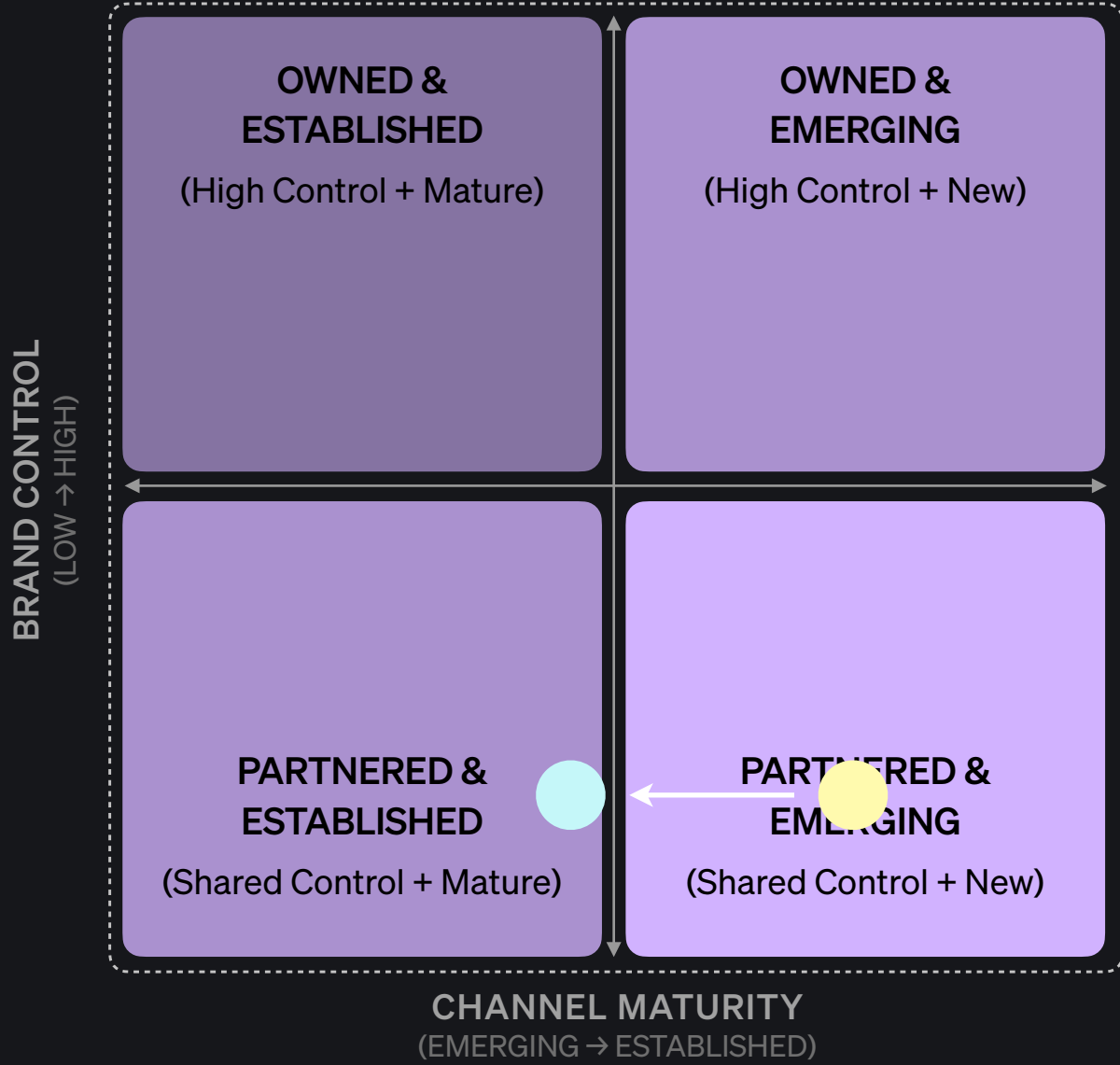
Once limited to deal-based flash sales, group commerce is now built into mainstream ecosystems like WhatsApp, WeChat, and Shopify Collabs.

It’s shifting from bargain hunting to community-driven shopping, powered by social proof and shared incentives.

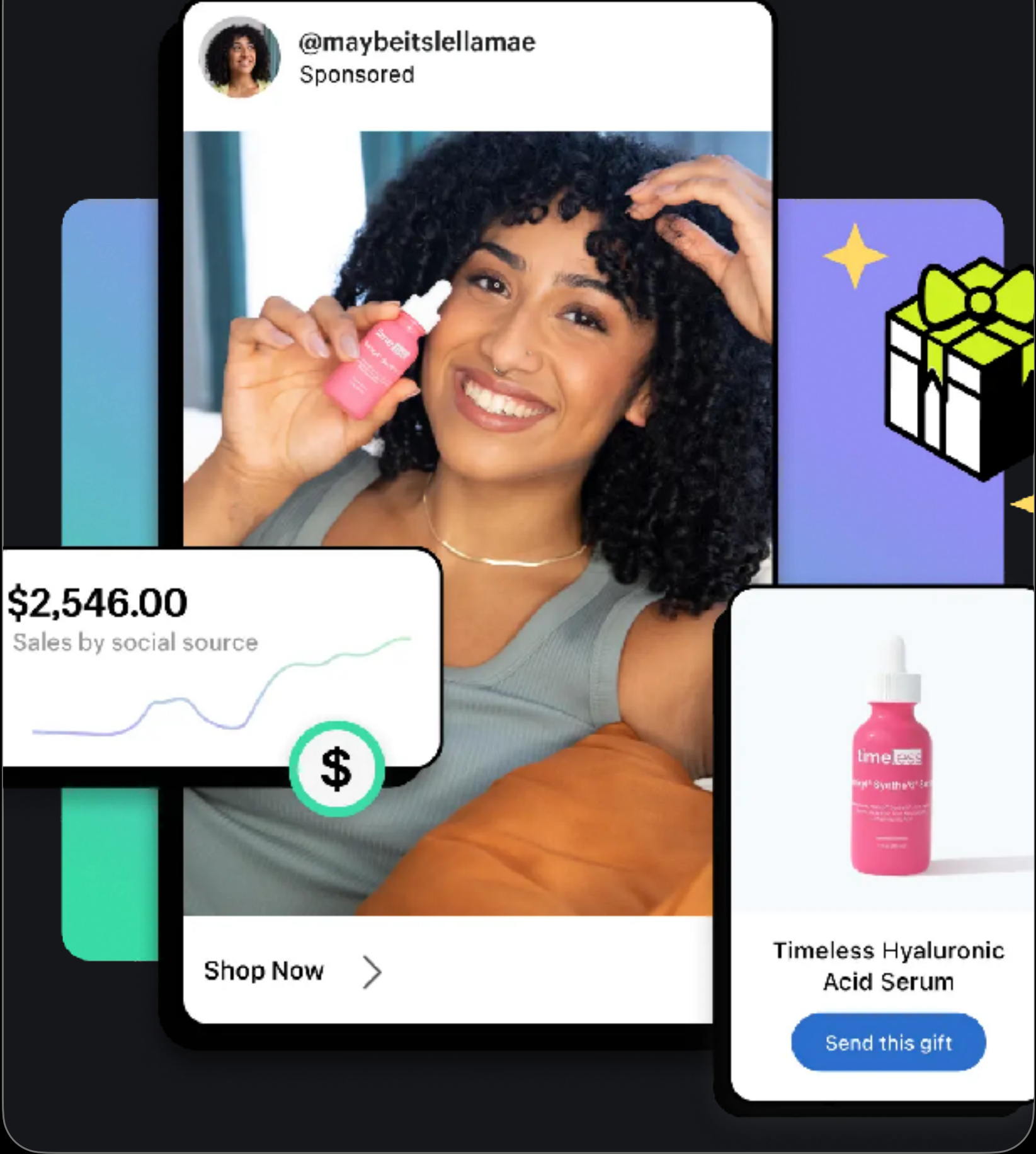
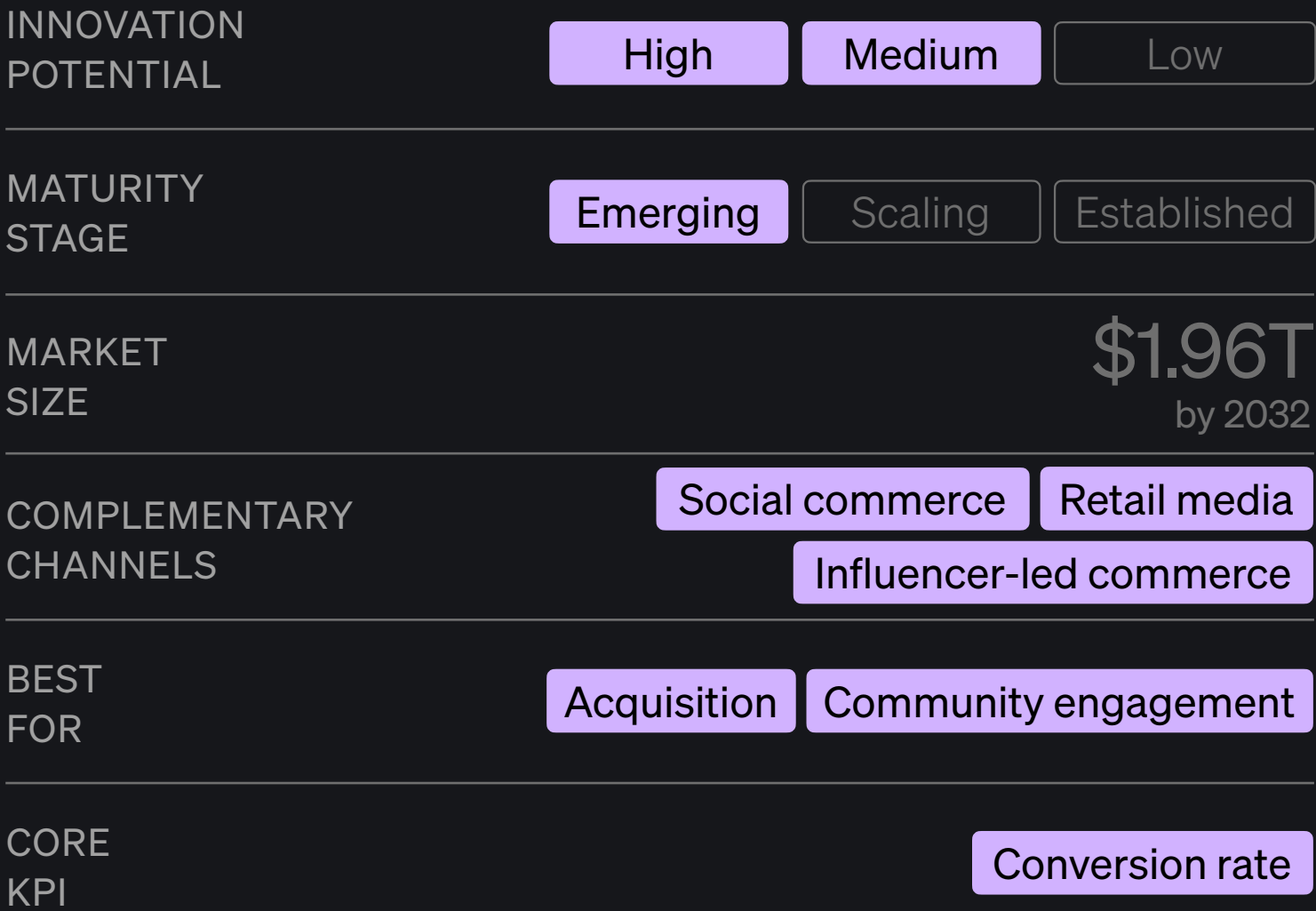
WHY IT MATTERS

- Lowers CAC by turning customers into recruiters.
- Converts social proof into direct sales.
- Creates fast feedback loops on pricing and bundles.

CHANNEL POSITIONING MATRIX



CHANNEL SNAPSHOT



INNOVATION OPPORTUNITIES

- Run private group buys in WhatsApp or owned apps with tiered rewards.
- Test ladder pricing and limited-time team targets to boost virality.
- Tie group buys to loyalty so new recruits are captured as members.

Case Study: PDD's Group Commerce at Scale

CHALLENGE:

Sustain rapid growth and user acquisition in an increasingly saturated and competitive e-commerce market.

EXPERIMENT:

Built its platform around team-purchase mechanics where users form buying groups through WeChat mini-programs to unlock lower prices. The model gamifies recruitment, using social sharing and rewards to drive virality and repeat use.

OUTCOME:

Delivered 59% full-year revenue growth in 2024, reaching RMB 393.8B. In 2025, PDD launched a RMB 100B merchant support program to sustain its ecosystem amid rising competition, geopolitical scrutiny, and margin pressure.

STRATEGIC TAKEAWAY:

Use group commerce to scale fast and gather insights, but pair it with long-term ecosystem investments to maintain sustainability when early-stage growth plateaus.



Recap of Future-Defining Consumer Channels

Retail is now an interconnected ecosystem, driven by evolving consumer motivations.

Discovery Channels

Where inspiration meets transaction

CLUSTER 1

1. Social commerce
 2. Influencer-led commerce
 3. Live shopping streams
 4. AI shopping assistants
- Strategic signal: Trust shifts from brands to people and algorithms. Discovery becomes decentralised.

Experience Channels

Retail as immersion and emotion

CLUSTER 2

5. Pop-ups & brand events
 6. Flagship Experience stores
 7. AR/VR Shopping environments
 8. Immersive & gaming commerce
- Strategic signal: Consumers buy into stories and sensations. Experience is retention

Convenience Channels

Removing friction across the buying journey

CLUSTER 3

9. Quick commerce / instant delivery
 10. Voice and Conversational commerce
 11. Subscription and auto replenishment
 12. Hybrid click and collect
- Strategic signal: Loyalty can be built on convenience with the idea of commerce disappearing into daily life.

Community Channels

Commerce as belonging and participation

CLUSTER 4

13. Re-commerce, rental & resale platforms
 14. Branded niche-media
 15. Group commerce
- Strategic signal: value is co-created. Communities drive advocacy and circular growth

How to find and prioritise new value spaces



Philip Hague

Innovation Design Director at 3M Consumer Business



Catja Prykop

Vice President Early Innovation at Beiersdorf



Lars Roessler

Head of Global Corporate Venturing at BSH Startup Kitchen



Maria Capezio

Head of I Lab_ Corporate Venture and Exploration Unit at Henkel



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Director of Innoventures at Biotronik



Cameron Allan

Venture Building Associate at JLR - InMotion Ventures Studio



Ruggero Renzetti

Venture Architect at A2A



Michael Munz

Senior Venture Architect at Kärcher



Dan Northover

Marketing & Services Director at JLR - InMotion Ventures Studio



Thomas Van Halewyck

Session host and CEO of Bundl



From Theoretical to Actionable Value Spaces

Success requires clear decision frameworks and leadership buy-in. Move beyond conceptual discussions by integrating spaces directly into corporate innovation roadmaps.



Prioritise with Confidence, Not Paralysis

Avoid getting stuck in analysis paralysis. Use a mix of strategic fit, market opportunity, and internal assets to prioritise high-impact spaces while maintaining agility for emerging trends.



Validate Early, Scale Smartly

Use external validation—customer insights, market testing, and industry benchmarking—to assess multiple spaces concurrently potential before full scale investment.



Timing is Everything

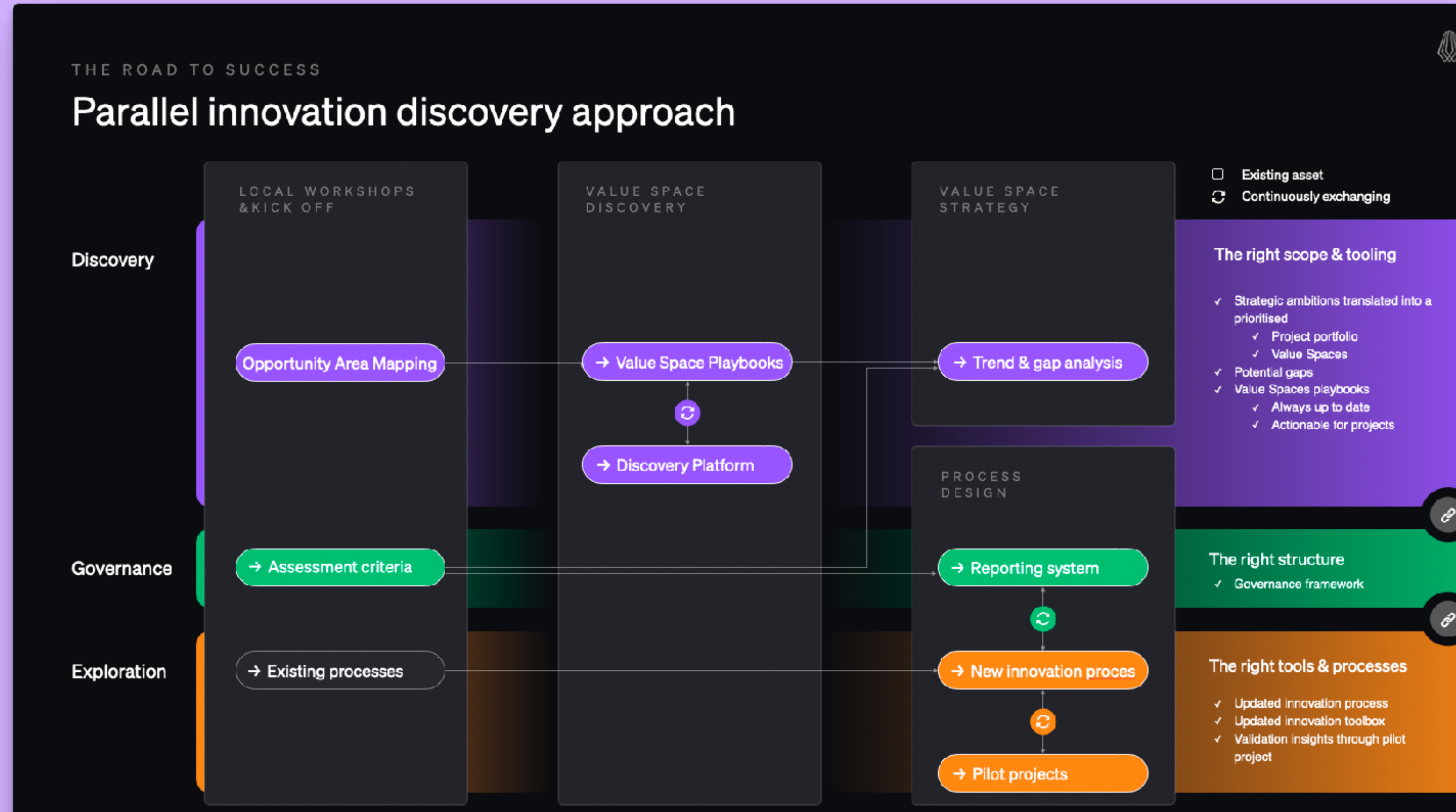
Not all spaces are ripe now—track regulatory shifts, emerging tech, and market readiness before diving in.



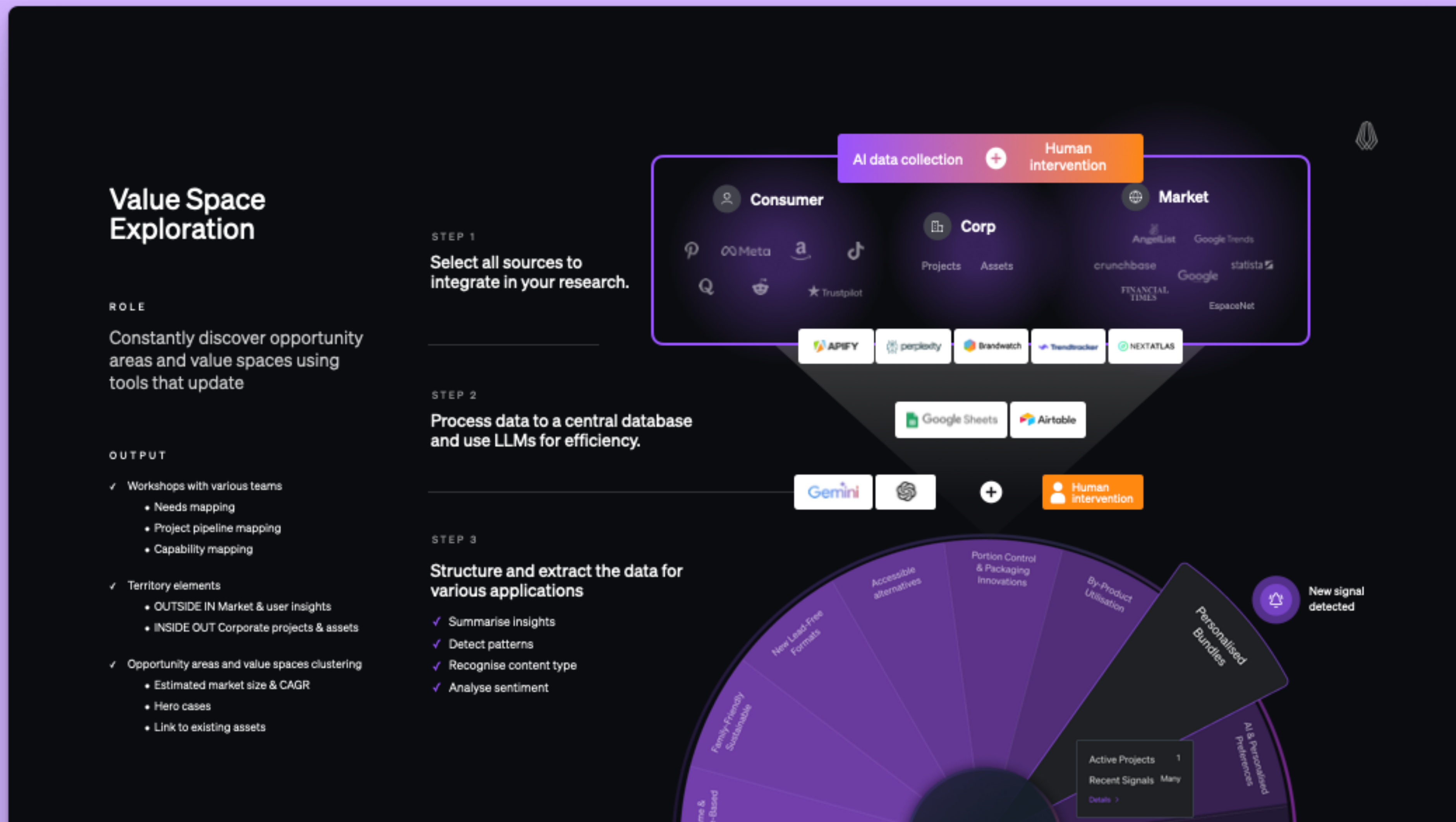
Sponsorship Determines Success

Internal support determines execution speed. Secure executive sponsors early, and align new opportunities with corporate objectives to ensure long-term commitment.

Key Value Space Actions



Key Value Space Actions



Key Value Space Actions

Territory template

ROLE

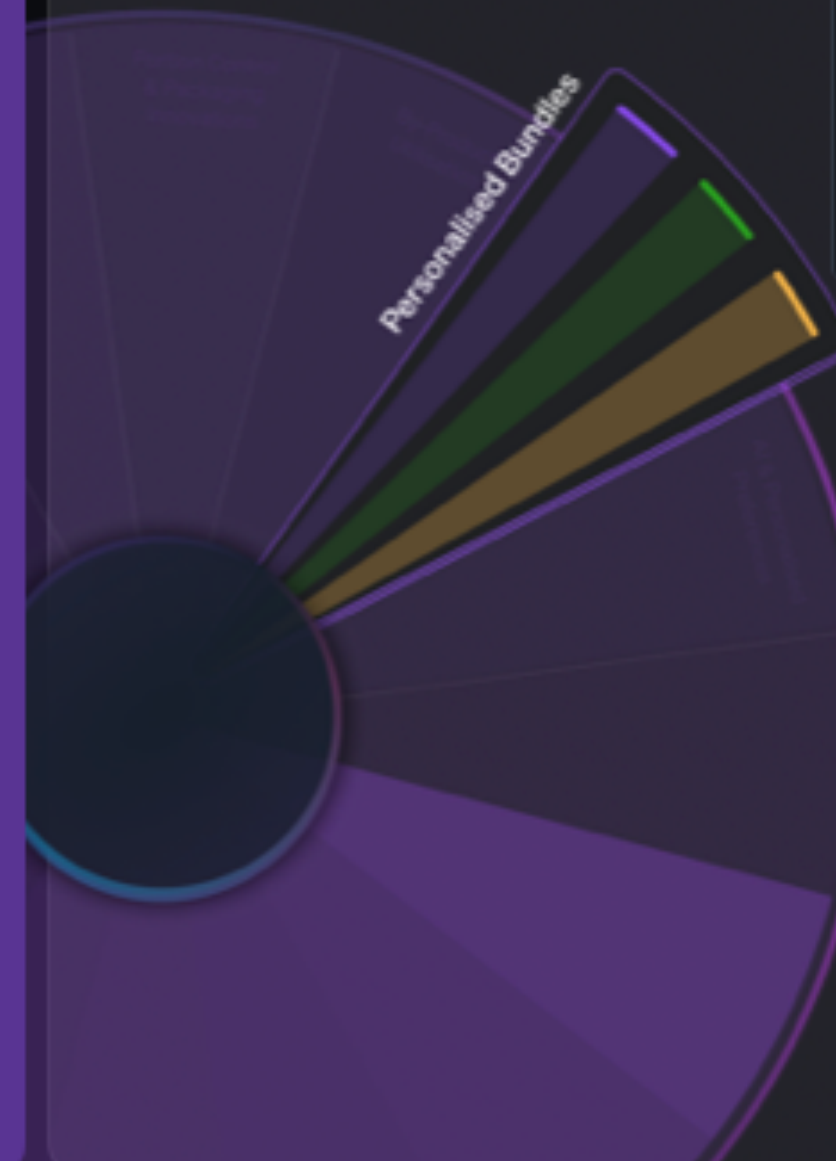
Communicate to relevant teams using a playbook that triggers interest and engagement

OUTPUT

- ✓ Workshops with various teams
 - Needs mapping
 - Project pipeline mapping
 - Capability mapping
- ✓ Territory elements
 - OUTSIDE IN Market & user insights
 - INSIDE OUT Corporate projects & assets
- ✓ Opportunity areas and value spaces clustering
 - Estimated market size & CAGR
 - Hero cases
 - Link to existing assets

Turn the data into an interactive visual tool or any another format.

AI chatbot, AI podcast, AI instagram account, ...



Trending Startups

Just Date US

Organic dessert meat packs with sustainable angles ingredients, upcycled fair trade, biodegradable.

Details >

Klopp and Marie DE

Home cooked meals that are delivered frozen for convenience. Options are tailored as your neighbours are looking for you.

Details >

Better Belly US

As more meals focused on gut health to support general wellbeing.

Details >

New customer trend

Rising demand for custom meals

Consumers are increasingly seeking alternatives to meal kits, with customisation emerging as a popular system due to their personalisation.

Details >

Competitor activities

Trio Pig US - Acquired & incorporated by Mars 2023

Moving from traditions and terroir you support, changing sustainability with heritage.

Details >

Global food market

USD 6.62B ²⁰²² → USD 12.20B ²⁰²⁸

Dried food market

USD 10.02B ²⁰²² → USD 16.64B ²⁰²⁸

New patent detected

Phaser value US/CH/FR/DE/IT/JP/US

This invention involves creating products that incorporate powdered freeze-dried fruits. The process...

Details >

See full list >

Latest News

Fruity Valentine

Companies offered freeze-dried strawberry toppings as part of their Valentines line-up.

Details >

See full list >

Key Value Space Actions

Trend and gap analysis

ROLE

Apply the assessment criteria to all territories and internal projects.

INPUT

→ Assessment criteria

OUTPUT

- ✓ Preparation depending on the assessment framework
 - ✓ Financial assessment (e.g. market size, growth forecast, startup traction,...)
 - ✓ Strategic assessment (e.g. fit with vision, leverage of existing assets,...)
- ✓ Prioritisation workshop to narrow down directions (1.5h min.).

STEP 1

Evaluate all value spaces & projects based on the assessment criteria.

Weighted average analysis

Assessment criteria



Project	Criteria 1	Criteria 2	Criteria 3	Criteria 4	Criteria 5	Criteria 6	Criteria 7	Criteria 8	Criteria 9	Criteria 10
01	High	Medium	Low	High	Medium	Low	High	Medium	Low	High
02	Medium	High	Medium	Low	High	Medium	Low	High	Medium	Low
03	Low	Medium	High	Medium	Low	High	Medium	Low	High	Medium
04	High	Low	Medium	High	Medium	Low	High	Medium	Low	High
05	Medium	Low	High	Medium	Low	High	Medium	Low	High	Medium
06	Low	High	Medium	Low	High	Medium	Low	High	Medium	Low
07	High	Medium	Low	High	Medium	Low	High	Medium	Low	High
08	Medium	High	Low	Medium	High	Low	Medium	High	Low	Medium
09	Low	Medium	High	Low	Medium	High	Low	Medium	High	Low
10	High	Low	Medium	High	Low	Medium	High	Low	Medium	High
11	Medium	Low	High	Medium	Low	High	Medium	Low	High	Medium
12	Low	High	Medium	Low	High	Medium	Low	High	Medium	Low
13	High	Medium	Low	High	Medium	Low	High	Medium	Low	High
14	Medium	High	Low	Medium	High	Low	Medium	High	Low	Medium
15	Low	Medium	High	Low	Medium	High	Low	Medium	High	Low
16	High	Low	Medium	High	Low	Medium	High	Low	Medium	High
17	Medium	High	Low	Medium	High	Low	Medium	High	Low	Medium
18	Low	Medium	High	Low	Medium	High	Low	Medium	High	Low
19	High	Low	Medium	High	Low	Medium	High	Low	Medium	High
20	Medium	High	Low	Medium	High	Low	Medium	High	Low	Medium
21	Low	Medium	High	Low	Medium	High	Low	Medium	High	Low
22	High	Low	Medium	High	Low	Medium	High	Low	Medium	High
23	Medium	High	Low	Medium	High	Low	Medium	High	Low	Medium
24	Low	Medium	High	Low	Medium	High	Low	Medium	High	Low
25	High	Low	Medium	High	Low	Medium	High	Low	Medium	High
26	Medium	High	Low	Medium	High	Low	Medium	High	Low	Medium
27	Low	Medium	High	Low	Medium	High	Low	Medium	High	Low
28	High	Low	Medium	High	Low	Medium	High	Low	Medium	High
29	Medium	High	Low	Medium	High	Low	Medium	High	Low	Medium
30	Low	Medium	High	Low	Medium	High	Low	Medium	High	Low
31	High	Low	Medium	High	Low	Medium	High	Low	Medium	High
32	Medium	High	Low	Medium	High	Low	Medium	High	Low	Medium
33	Low	Medium	High	Low	Medium	High	Low	Medium	High	Low
34	High	Low	Medium	High	Low	Medium	High	Low	Medium	High
35	Medium	High	Low	Medium	High	Low	Medium	High	Low	Medium
36	Low	Medium	High	Low	Medium	High	Low	Medium	High	Low
37	High	Low	Medium	High	Low	Medium	High	Low	Medium	High

EXAMPLE CRITERIA

FINANCIAL

- ✦ Market size
- ✦ CAGR
- ✦ External investment
- ✦ ...

STRATEGIC

- ✦ Fit with ambitions
- ✦ Leverage supply chain
- ✦ Target audience
- ✦ ...

STEP 2

Prioritise value spaces and projects and identify specific gaps.

Empty value spaces with high priority



Bundl's experience discovering value spaces for global growth

Givaudan[®]

Identifying opportunity
spaces fuelled by
digital.

essity

Spotting innovations
close to the portfolio of
Essity Ventures



LIBERTY GLOBAL[®]

Unveiling opportunities
within Home Management
Ecosystems (HEMS).

BOORTMALT[®]
MASTERS OF MALT

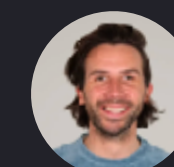
Finding new opportunities
beyond the core to
develop joint value
propositions.

Beiersdorf

Unearthing
opportunities within
Digital Skin Health.



Interested in discovering and activating new value spaces for your company? Reach out to thomas@bundl.com for more info on how we can help.



BUNDL

Looking to discover new opportunities to grow your corporate innovation ecosystem?

TRUSTED BY THE LARGEST CONSUMER BRANDS IN THE WORLD TO DELIVER IMPACT

CHANEL



P&G

FUJITSU



Nestlé



ABInBev



JAGUAR



Beiersdorf



We bring decades of corporate innovation experience that builds new revenue engines at startup speed for leading consumer brands.

Our global team of entrepreneurs transform your assets and scale into ventures that live in customer's hearts and carts.

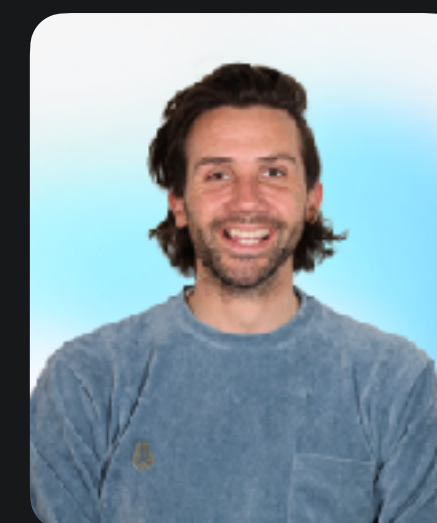
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Thomas Van Halewyck
CEO of Bundl

LinkedIn

Email

Book Call



Thank You

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