

Retail Media & Omnichannel Activation:

Refining how we talk to cold-chain shoppers

→ Brought to you by The Chill-Aisle Champs





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The Chill-Aisle Champs

One Shopper. One Journey.

94%

of grocery shoppers
purchase both

ONLINE + IN-STORE



**THE SAME SHOPPER.
A MORE CONNECTED
JOURNEY.**

NEARLY

3/4

of total grocery dollar
growth is driven by

ONLINE

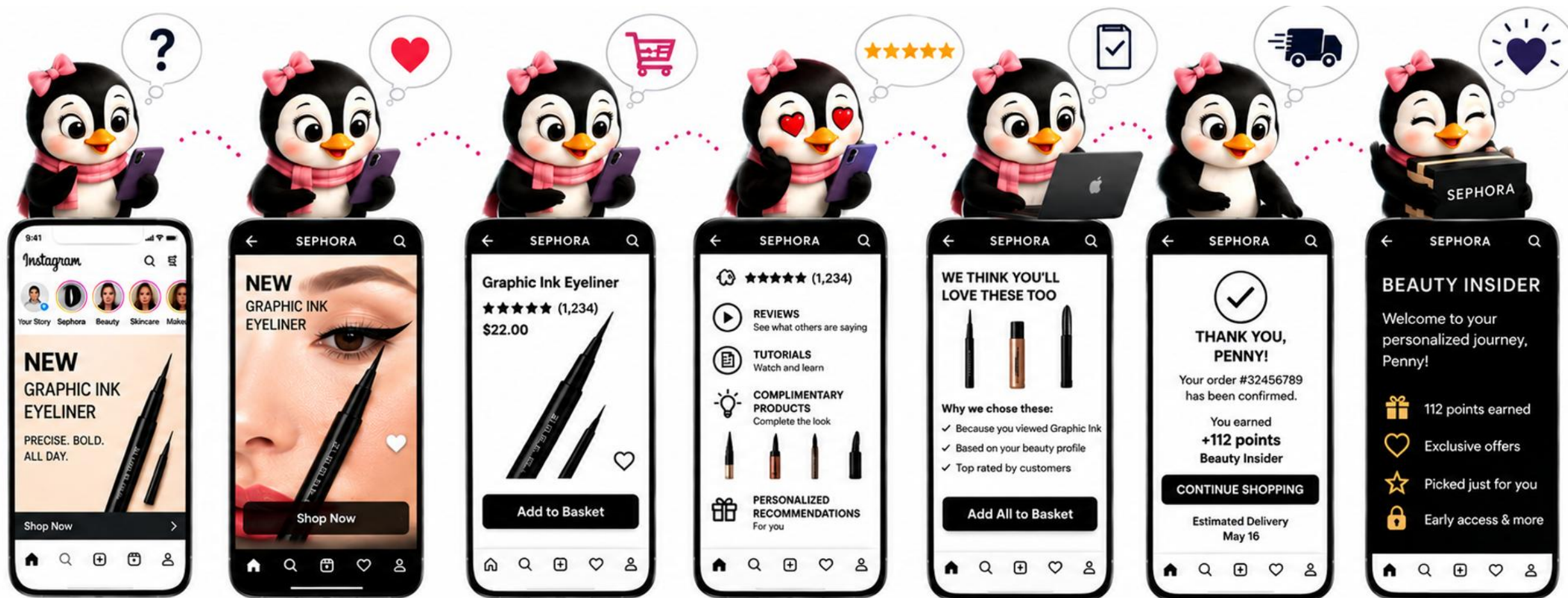


Meet Penny



Penny's Journey

A seamless, connected experience



Why Sephora?

The four connected capabilities behind omnichannel leadership.



Why a Standard Playbook Doesn't Yet Exist



1 SHOPPER JOURNEY



Non-Linear & Complex

In-Store & Online

3 MEASUREMENT



Measure what matters

Is it incremental?

MOST CATEGORIES
STOP AT
CONVERSION
FROZEN &
REFRIGERATED
CANNOT



2 COLD-CHAIN EXECUTION



Was the item available?

Did the item stay cold?

4 RETAILER ECOSYSTEMS



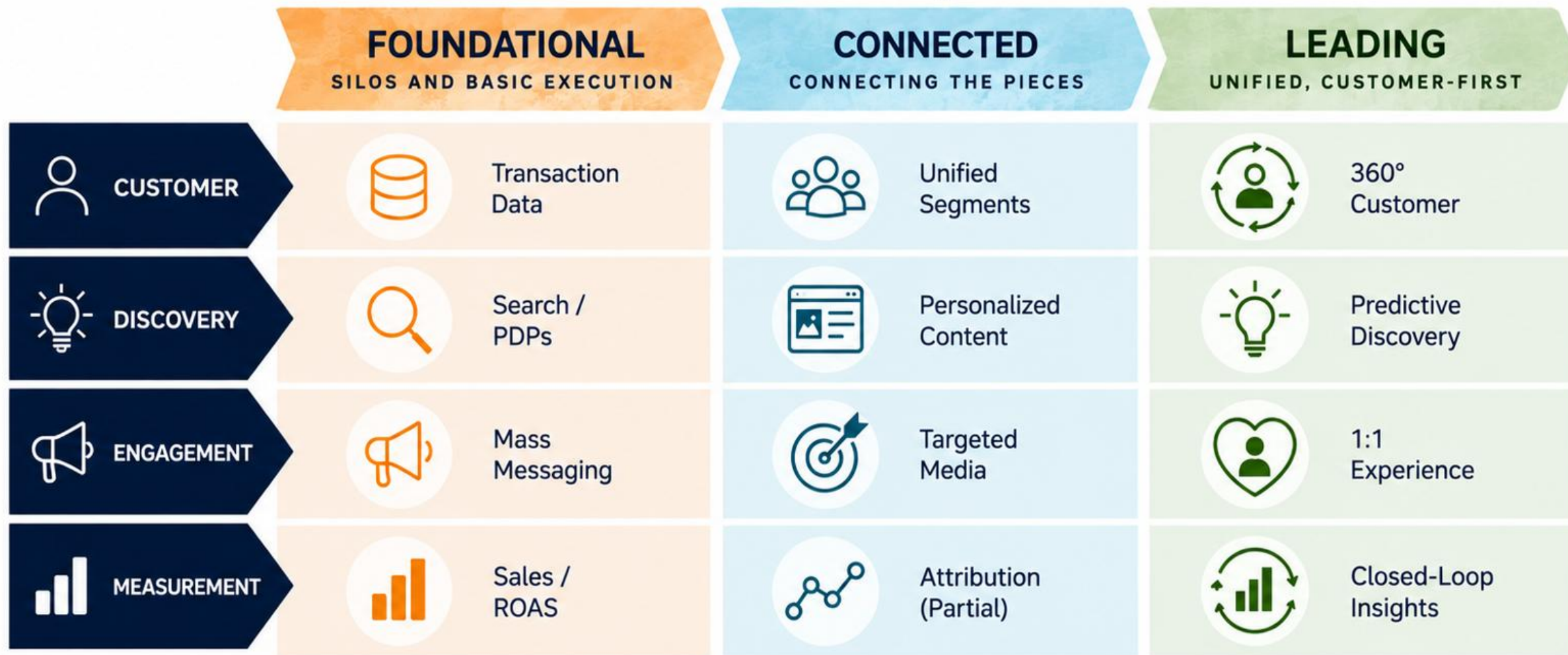
100+ RMNs

Constantly evolving

Omnichannel Maturity

Most are here today

↓



THE GOAL ISN'T TO LEAP TO LEADING.
IT'S TO KNOW WHERE YOU ARE — AND MOVE FORWARD.

We All Own a Piece of the Omnichannel Playbook





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FIRST PENGUIN
NFRA'S NEXT GENERATION
LEADERSHIP PROGRAM

Appendix:

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FOUNDATIONAL

CONNECTED

LEADING

Customer

- Limited transactional data

- Some segmentation

- 360 unified customer view
- Real-time personalization

Discovery

- Search-driven
- Minimal Content

- Reviews & ratings
- Early-stage inspirations

- Discovery-led ecosystem
- Coverts browsing into demand

Engagement

- Mass promotions
- Price-led, not personalized

- Conversion focused media

- Media seamlessly integrated into experience

Measurement

- Basic sales reporting
- Limited conversion visibility

- Campaign-level measurements

- Closed-loop measurement
- Full-funnel attribution

Want to Learn More?

- **FMI Retail Media Standards**

- <https://acrobat.adobe.com/id/urn:aaid:sc:US:f0e693be-df1b-4d18-815f-0acd22b6f75c>

- **Grocery Retail Media: Growth Trends & What They Mean for 2026**

- [Retail Media Networks 2026: 23 Key Stats for Grocery & CPG Growth](#)

- **Inside Sephora's Data-First Loyalty Engine:**

- [Inside Sephora's Data-First Loyalty Martech Stack](#)

Additional Information & Sources

- **Future Retail Disruption**
 - [T-Mobile_EMARKETER_Snapshot_2026 - Adobe cloud storage](#)
- **Sephora's Beauty Insider loyalty program reported record-breaking sales events and a 15% year-over-year increase in birthday gift redemptions, signaling that its strategy to transform loyalty from transactional perks to emotional connection is paying dividends.**
 - [Why 30% Of Sephora's 46 Million Loyalty Members Now Play Games To Shop](#)
- **Meet the former Sephora exec betting commerce media can predict the future**
 - [Kiri Masters: Meet the former Sephora exec betting commerce media can predict the future | The Drum](#)
- **Retail media networks expect growth, but challenges remain**
 - Retail Media networks are projected to grow rapidly, but future success will depend on proving measurable ROI, leveraging AI-driven innovation, and strengthening execution across merchandising, inventory, and retailer-brand partnerships.