



# Connected Commerce

The Future of Retail Media in a  
Fragmented Market

# Intro to Olly

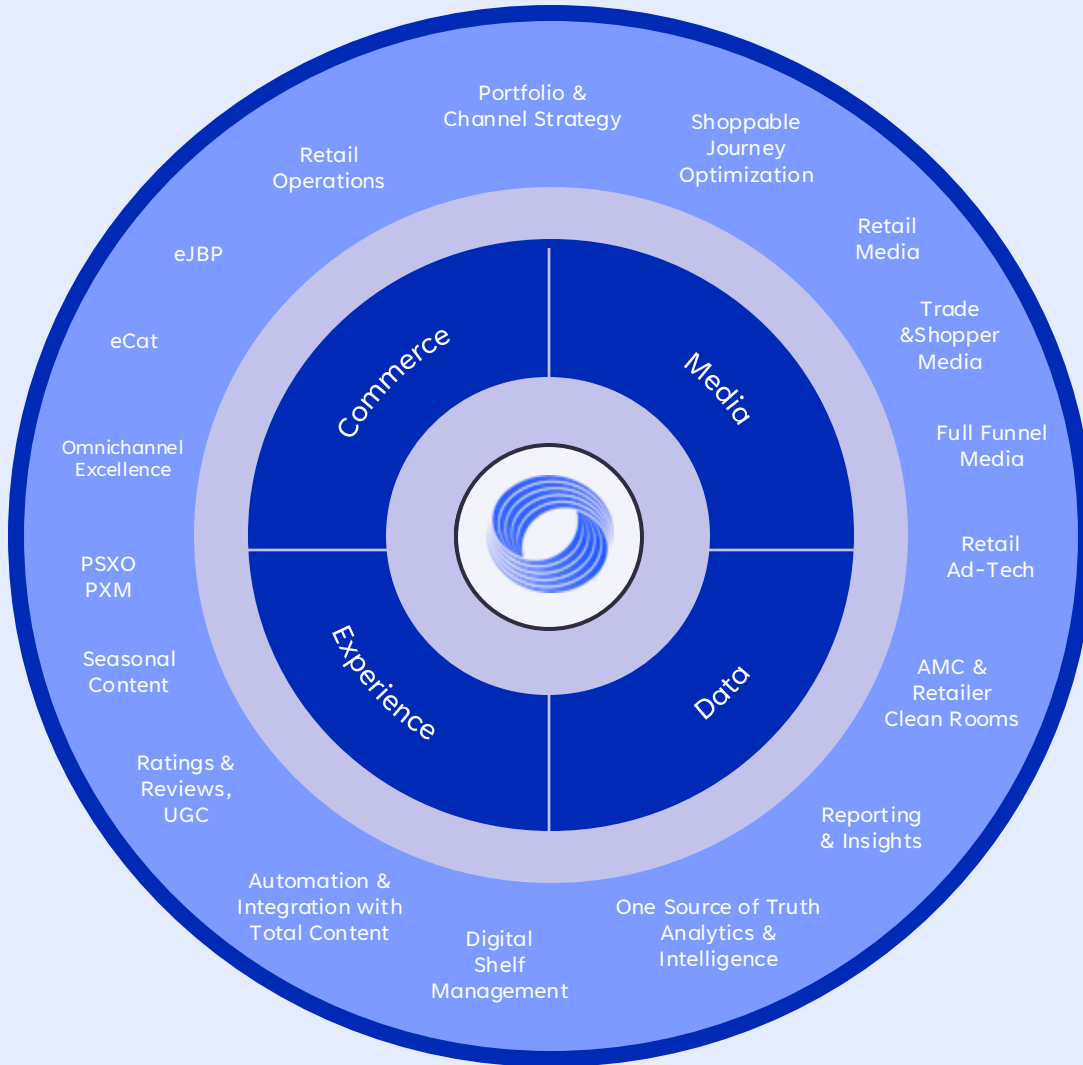


Olly joined Flywheel in 2020 and has led cross-category client teams delivering sharp strategy and execution across retail and media. His passions live in DSP, Ad Tech, and retail media innovation - though his eight years in the retail trenches at Tesco and Groupon ensure a deep understanding of industry performance & challenges

Outside work, Olly splits his time between his young family, friends, staying fit, and his overly enthusiastic support of Arsenal FC.



# Flywheel: Global Commerce Solution, Built to Drive Profitable & Incremental Sales & Share



#1 Largest commerce agency

#1 Retail media spend worldwide

Market leading commerce tech stack

Industry leading rates and JBPs



# What do we mean by 'Incremental'?

## What is Incrementality?

Incrementality measures the *true impact of a retail media activity* on business outcomes (e.g., sales, clicks, etc.).

It determines the increase you can attribute to specific campaigns, not just the total change.

## And why should you care?

Ensure retail media is not taking credit for sales and clicks that would have happened regardless. This is a waste of media budget!

Target shoppers & audiences that have high chance to buy, but need direction, education, or encouragement.

**How does Flywheel measure this? And how does Flywheel optimise for greater incrementality?**



# Unlocking incrementality & efficiency with proprietary, automated tools

The RIGHT, incremental & retail-ready, SKUs

**Incrementality Tools**  
Identify incremental opportunities and measure impact of ad strategies

Product	Incrementality Score
B000ABC123	9.8
B000ABC456	6.2
B000ABC789	0

**Contextual Automation to help maximize CVR**

One-time purchase

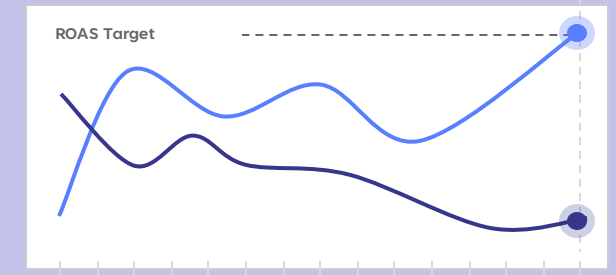
£149 ~~£159.99~~

One-time purchase

In stock on March 3rd, 2026

Hitting the RIGHT PLACEMENTS

**Placement Targeting**  
Maximize SOV on top priority head terms (<30k SFR)



**Goal Based Bidding**  
Drive efficiency on tail terms (>30k SFR) by seeking a ROAS goal

At the RIGHT TIME

**Intraday Bidding/FIDO/Stream Data**  
Objective: Win during the best hours of the day and minimize CPCs during inefficient times

7 AM	8 AM	9 AM
30%	50%	100%



# Incrementality Tools to Identify the Most Likely Place for a Conversion at Scale

Identify highly incremental product and keyword opportunities

Measure incremental sales occurring due to presence of an ad

Bridge the gap between ad investment and revenue growth

Incrementality Score Input:  
Conversion rate + ASP Delta + \*Weighted Organic Rank + PPU + Volume

ASIN	Incrementality Score ↓	LM Total CVR	Organic Rank	LM ASP
B000ABC123	9.8	36%	46	\$12.99
B000ABC456	6.2	44%	20	\$13.99
B000ABC789	0	48%	1	\$10.99

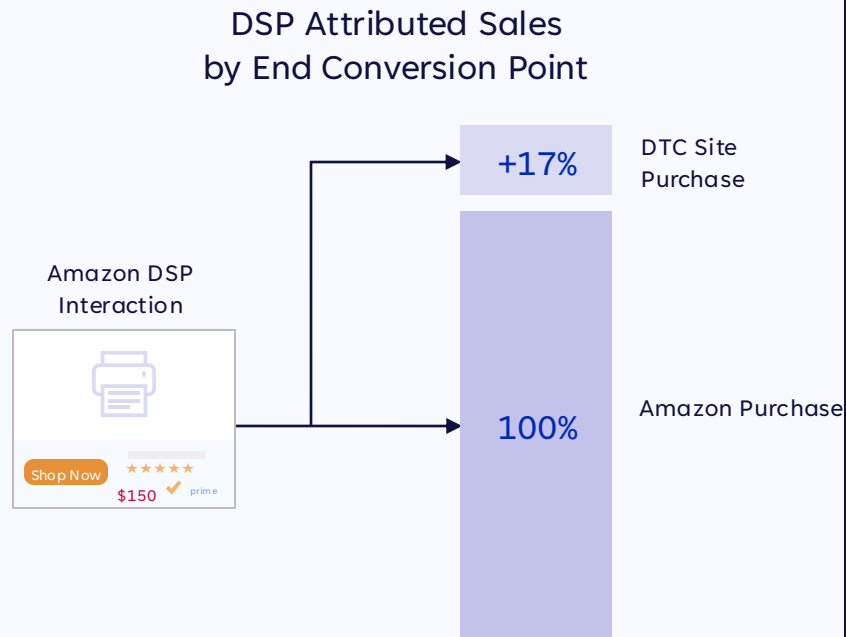
ASIN	Keyword	Incremental Spend	Incremental Sales	Incremental ROAS
B000ABC123	hair straightener	£250	£500	£2.00

Report out on incremental sales driven by campaigns



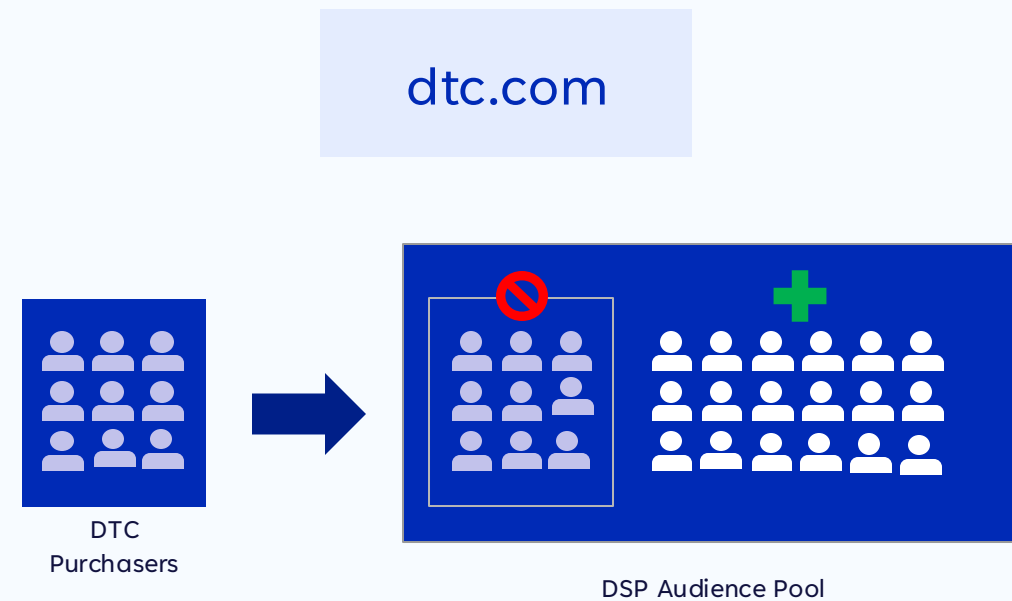
# Pushing the boundaries of incrementality: Leverage Purchase Data to Exclude Non-Incremental Spend

## Client Example: Attribution



+17% in sales when considering DTC conversions preceded by a DSP view

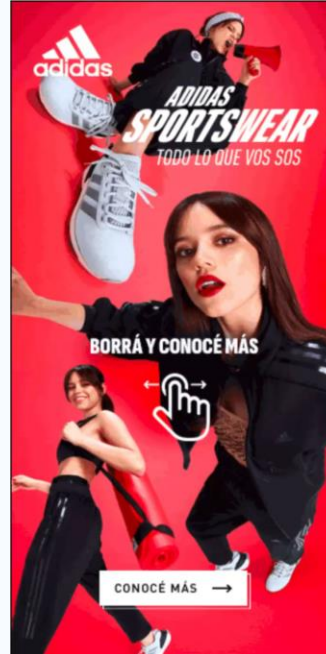
## Client Example: Incrementality



By removing DTC purchasers, we saved more than 100K non-incremental impressions per month



# Creative Optimization for Increasing Interactivity and Engagement



From exclusively static REC

To more dynamic and engaging formats



# Amazon, but not **only** Amazon

## The depth of Amazon

Access for brands: Retail management, search media management, display management

Metrics we have access to:

- New to brand sales
- Return on consumer
- Long-term value
- Return on Ad Spend
- Organic rank
- And so much more...

A clean room to bring it all together, where you can add other data, e.g. DTC data: Amazon Marketing Cloud (AMC)

## The breadth of more retailers



Why do we work with some retailers but not others? **Access to data.**



# Together, Flywheel & Amazon have partnered to provide a **simple, end to end solution** for retailers



Enabling retailers to launch retail media networks powered by Amazon ad tech and Flywheel services to monetise first-party data and digital retail assets at scale



## KEY BENEFITS



LEADING AD  
TECH



NO UPFRONT  
COST



SEEMLESS  
INTEGRATION



GLOBAL  
REACH



DEEP  
EXPERTISE




SPEED TO  
MARKET



# What our unique offering means to the brands we work with, beyond what they can do with their retailer directly

## Expertise

 **+1,700**

### Marketplace experts

with deep domain expertise from the world's largest retailers and brands.

Control **\$10B+** managed retail media spend, dominating the market.

## Consistency

Working with Amazon **since 2014**

**All retailers** measured, executed and reported on in a single platform

**Retailer and brand growth** strategies (e.g. monetisation efficiency)

## Scale

The **world's largest retail media buyer**,  working with 13 of the top 20 largest brands globally.

Bringing **upper funnel brand spend** to retailers through our relationships, network and scale



## Capability

Ability to **accelerate spend** into Retail Media Networks through our **OM group-wide expertise**, including SMEs in tech, data, privacy & compliance

**Insights across retailers** inform strategy

**Advertiser onboarding** either direct or via FCC

## Services

**Retailer onboarding & ongoing support** (tech & business)

**Advertiser onboarding** either direct or via FCC

**Retailer growth** strategies (e.g. monetisation efficiency)

**Retailer custom solution** development (e.g. advertiser insights program, attribution)



# How Flywheel improves retailer relationships

Flywheel supports our client partners in their Retailer JBPs with custom playbooks and negotiation support

We leverage our own retailer JBPs to get early access to **Alphas**, **Betas**, **Co-Devs**, and **Rate Reductions** which we pass through directly

## PARTNERSHIPS

**Amazon:** Tier 1 Partner, Advisory board & Measurement council

**Instacart** Advisory Council Member and Preferred Partner

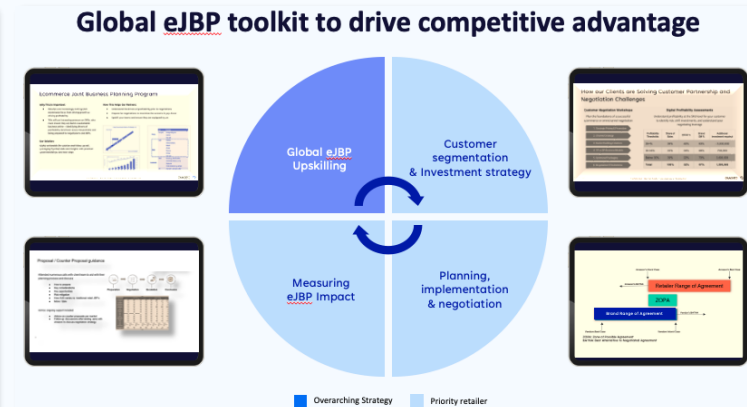
**Walmart** Connected Content Partner

**Criteo** Preferred API Partner

**Kroger** Preferred Partner

## Custom-built eJBP toolkits for clients

JBP Offering Details		
<p><b>CORE OFFERING</b></p> <p>This offering is provided to all OMG/FW Clients and serves as the foundation for negotiation support.</p> <p><b>JBP Best Practice</b></p> <ul style="list-style-type: none"> <li>Insights into principles &amp; processes driving success</li> </ul> <p><b>Customer Planning Guide</b></p> <ul style="list-style-type: none"> <li>Includes updates for major platforms (Amazon, WMT, Costco, etc).</li> </ul> <p><b>Marketplace Trends</b></p> <ul style="list-style-type: none"> <li>Insights into the latest trends and dynamics within retail.</li> </ul> <p><b>OMC Partnership Benefits</b></p> <ul style="list-style-type: none"> <li>A consolidated view of current client benefits from working with OMG/FW</li> </ul>	<p><b>JBP TOOLKIT</b></p> <p>Requires additional scope and provides clients with a comprehensive set of resources and templates designed to help brands and retailers collaboratively build, execute, and track effective Joint Business Plans.</p> <p><b>Opportunity Sizing</b></p> <ul style="list-style-type: none"> <li>Analyze growth opportunity with retailer partner over next 1-3 years</li> </ul> <p><b>Customer Segmentation &amp; Capability Assessment</b></p> <ul style="list-style-type: none"> <li>Prioritize retailer partner based on readiness &amp; capability assessment</li> </ul> <p><b>Mapping the Levers</b></p> <ul style="list-style-type: none"> <li>Identify asks, key negotiation points, and potential value creation opportunities aligned to retailer's capabilities. Outline any non-negotiables and what success looks like</li> </ul> <p><b>Investment Strategy</b></p> <ul style="list-style-type: none"> <li>Diagnostic of your value to customer and your potential growth opportunity to inform how much to invest and where</li> </ul> <p><b>JBP Prep &amp; Upskilling Sessions</b></p> <ul style="list-style-type: none"> <li>Train your teams on JBP best practice / advanced negotiation; support preparation and review of JBP materials to enhance negotiation outcomes</li> </ul> <p><b>Strategic Customer Collaboration Program</b></p> <ul style="list-style-type: none"> <li>Facilitate a joint vision of the future for brand &amp; customer to align on opportunities</li> </ul>	<p><b>FULLY MANAGED SERVICE (MEDIA JBP ONLY)</b></p> <p>Requires additional scope and provides clients with expert guidance to navigate retail negotiations.</p> <p><b>End-to-End Management of JBP Negotiations</b></p> <ul style="list-style-type: none"> <li>Complete oversight of the JBP negotiation, ensuring alignment with client objectives.</li> </ul> <p><b>Creation of RFP/Requirement Documentation</b></p> <ul style="list-style-type: none"> <li>In-depth and customized RFPs developed to reflect specific growth objectives, advertising needs and strategies.</li> </ul> <p><b>Scheduling and Communications with RMN Partners</b></p> <ul style="list-style-type: none"> <li>Coordination of meetings and communications with Retail Media Network partners to facilitate smooth interactions.</li> </ul> <p><b>Ongoing Tracking of Benefits</b></p> <ul style="list-style-type: none"> <li>Monitoring and reporting on the performance of negotiated benefits throughout the campaign lifecycle.</li> </ul> <p><b>Legal and T&amp;C Reviews</b></p> <ul style="list-style-type: none"> <li>Thorough review of agreements and terms &amp; conditions to mitigate risks and ensure compliance.</li> </ul>



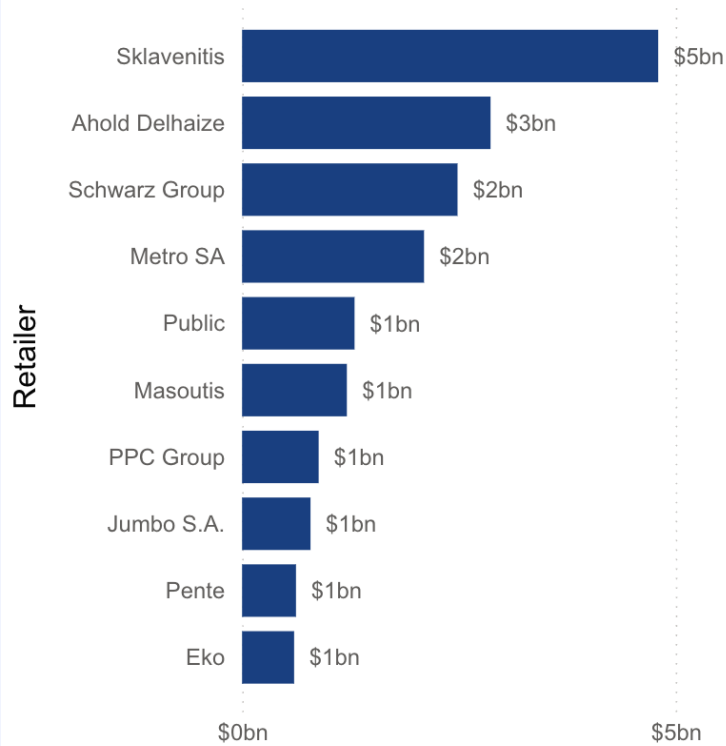
*“Flywheel Is the one partner who pushes us”*

- Paul Kotas, SVP Amazon Ads @ CES

# But why does what we're doing in the rest of Europe apply to Greece?

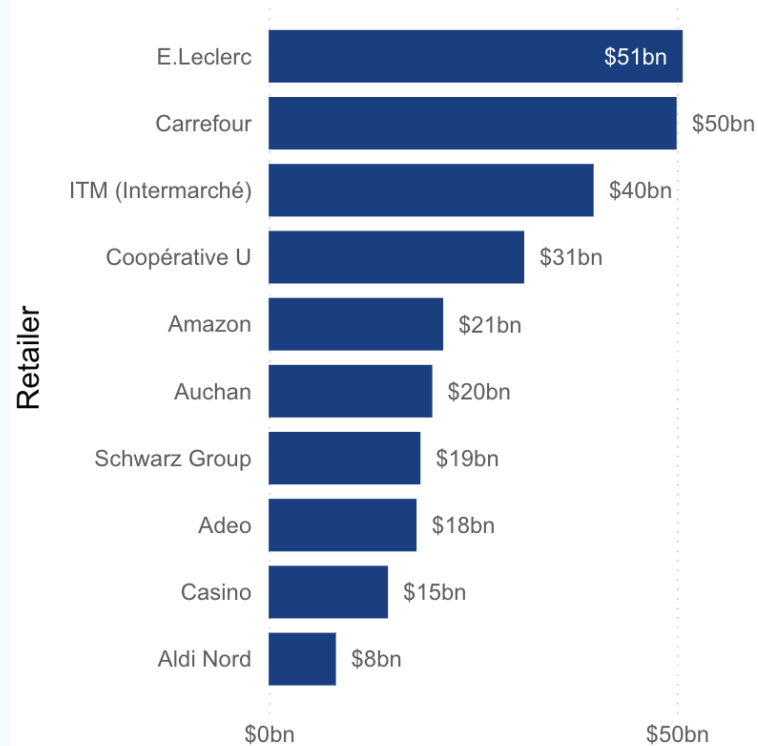
## Greece

Top 10 Retailers - 2025



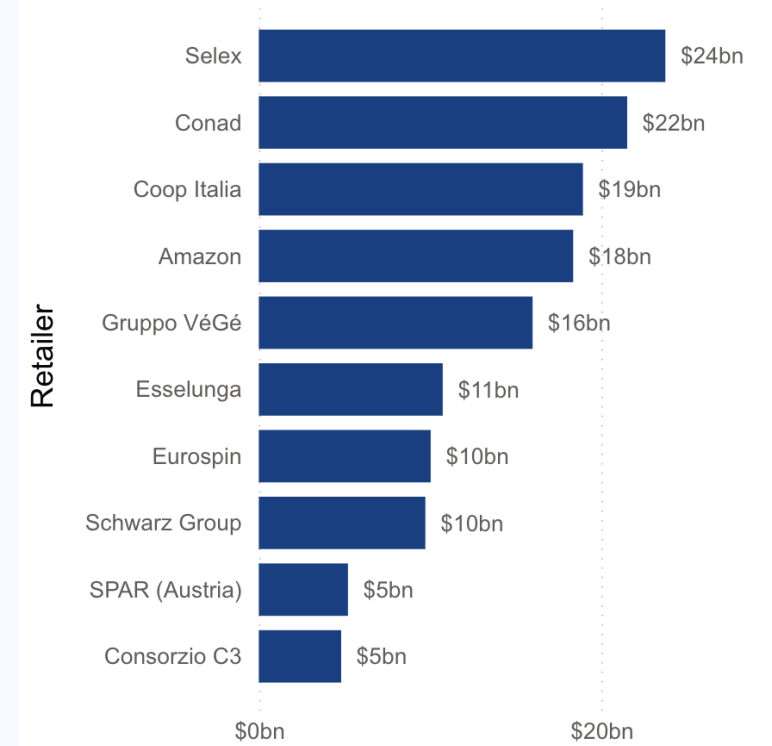
## France

Top 10 Retailers - 2025

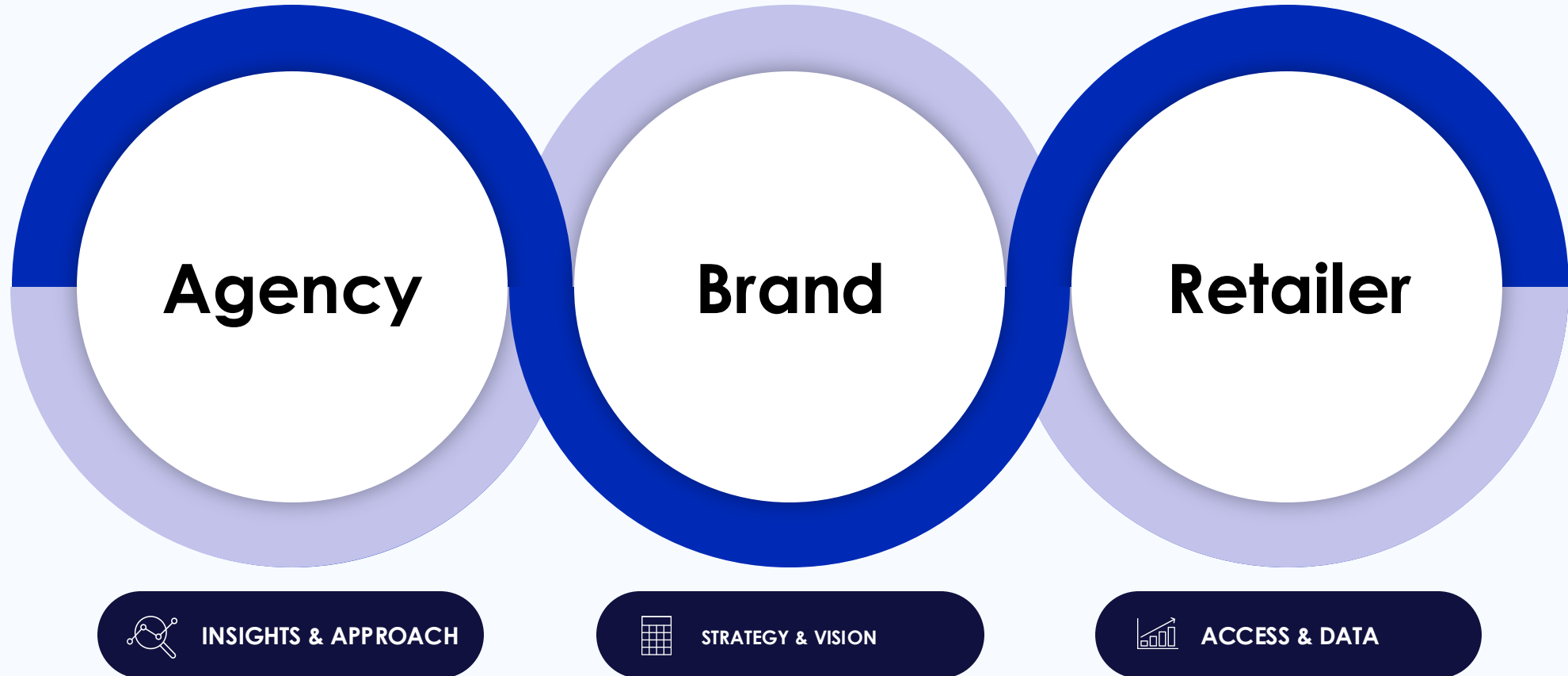


## Italy

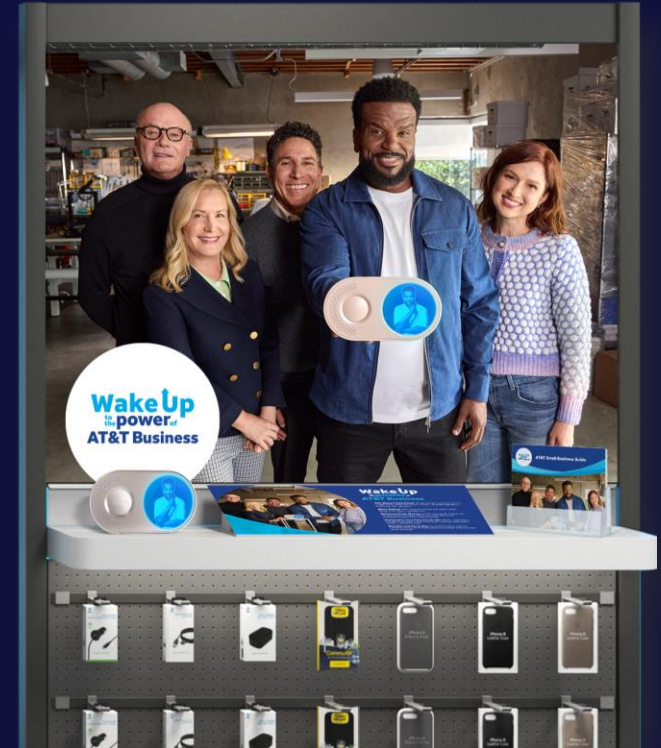
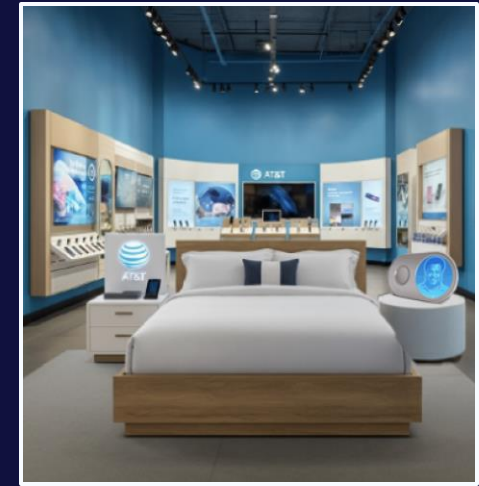
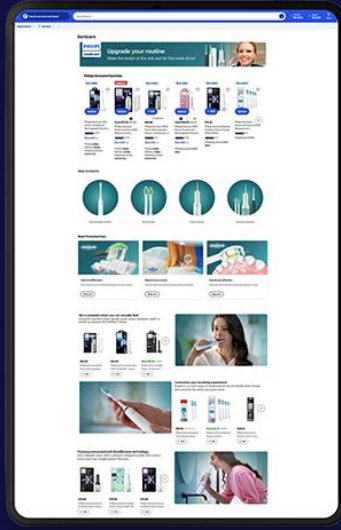
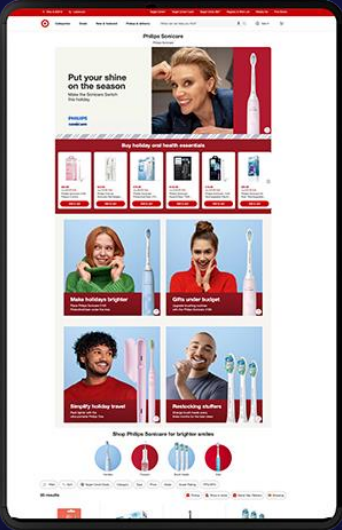
Top 10 Retailers - 2025



# The ideal setup for success



# The ultimate goal: True connected commerce





Thank you