



Partnerize

U.S. Retail Affiliate Marketing Sales Index

Updated through August 31st, 2023



Introduction

In developing the U.S. Retail Affiliate Marketing Sales Index we measured the gross merchandise sales directly attributable to affiliate marketing promotions for the period beginning January 1st through December 31st and compared them against the affiliate gross merchandise sales for the same period in 2022.

We analyzed performance in 10 retail categories comprised of ~700 retail brands as tracked in the platform. Additionally, commission trends, publisher activity and customer behavior were also examined.

The U.S. Retail Affiliate Marketing Sales Index data is not intended as a proxy for overall affiliate marketing activity, e-commerce activity overall, or the performance of any individual business, including Partnerize. On a periodic basis, we review and update our same store flag methodology as new stores join the platform. On June 20th, 2021, we updated our same store logic to more closely reflect trend activity. Periodic normalization to account for data anomalies may also occur.

Vertical status through August 2023

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Surging

Home & Garden



+19% YoY

Accessories & Jewelry



+12% YoY

Clothing & Apparel



+43% YoY

Increasing

Food & Drink



+1% YoY

Gifts & Flowers



+5% YoY

Health & Beauty



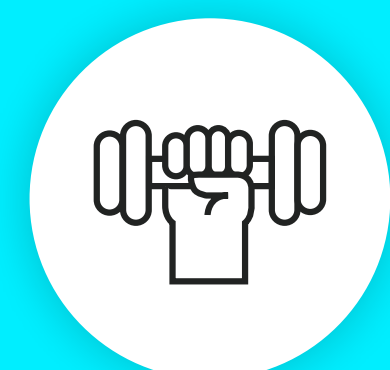
+5% YoY

Computers & Electronics



+3% YoY

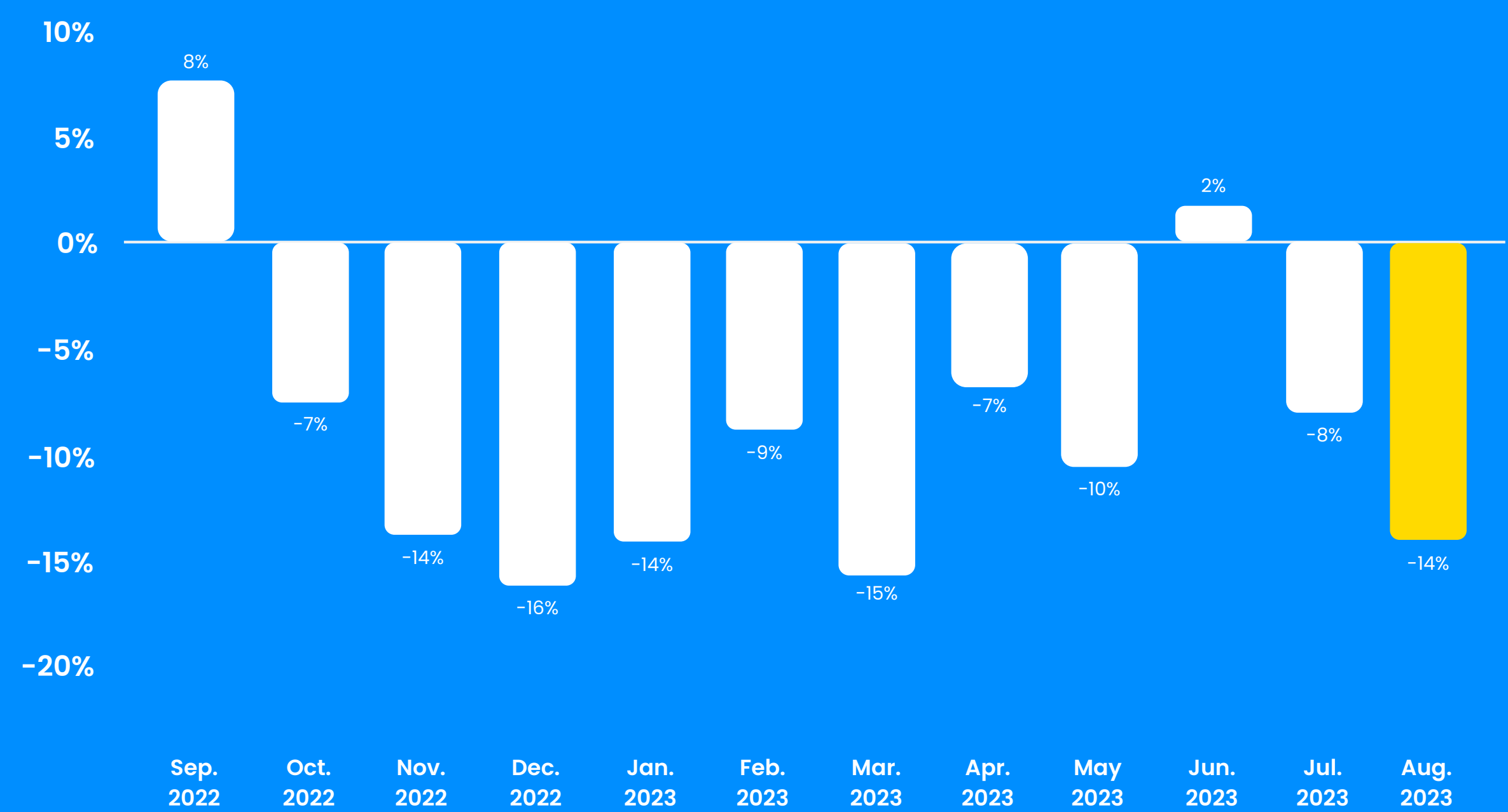
Sports & Fitness



+5% YoY

Monthly revenue trends

Gross Revenue YoY Growth

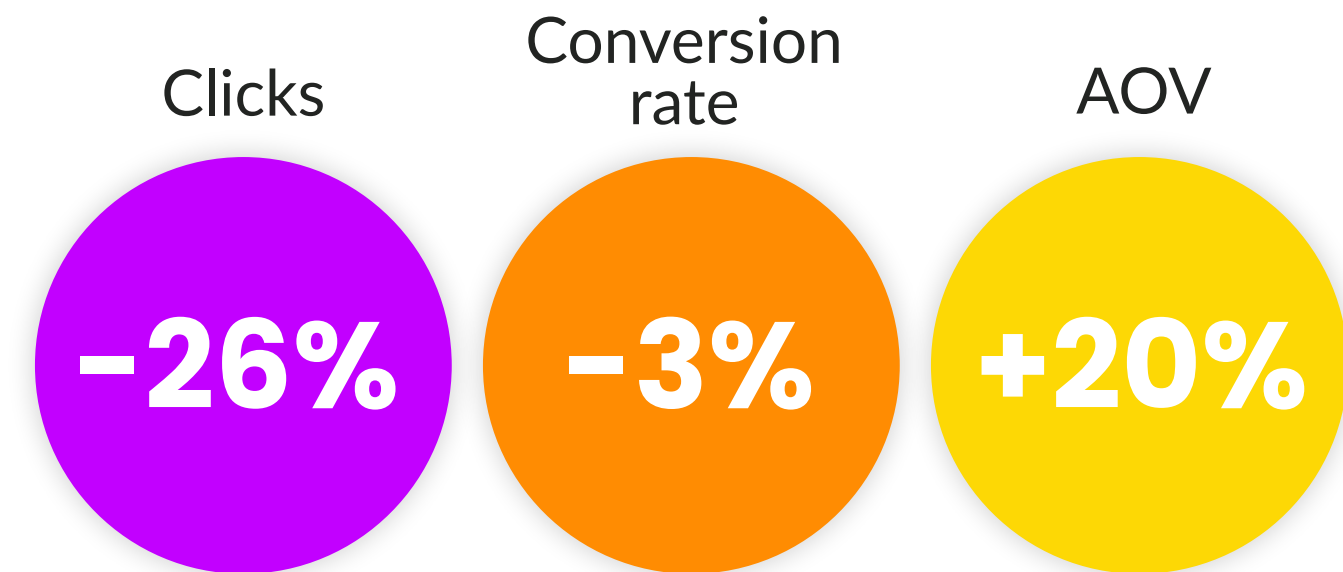
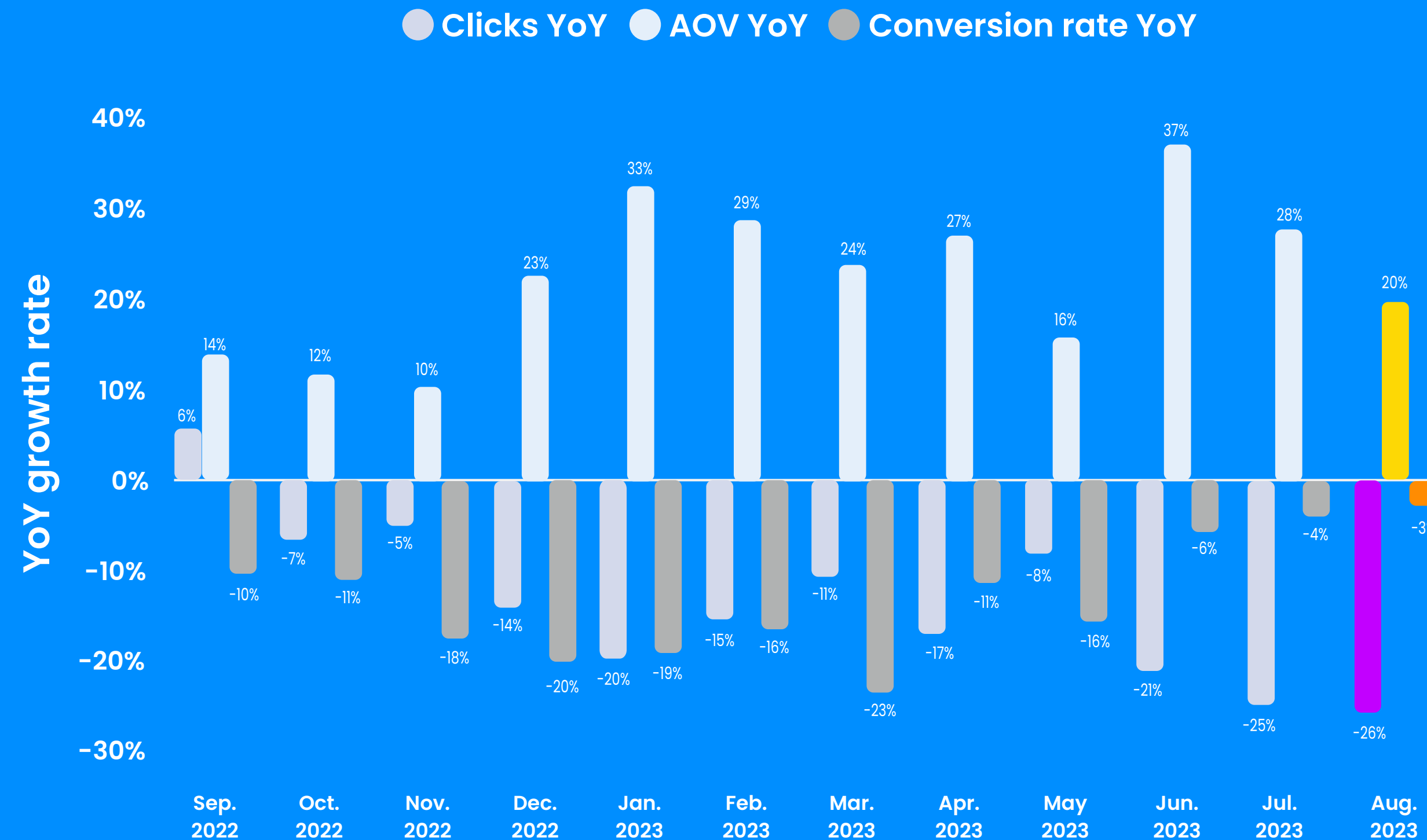


-14%

August saw a 14% decrease in gross revenue.

Drivers of monthly revenue growth

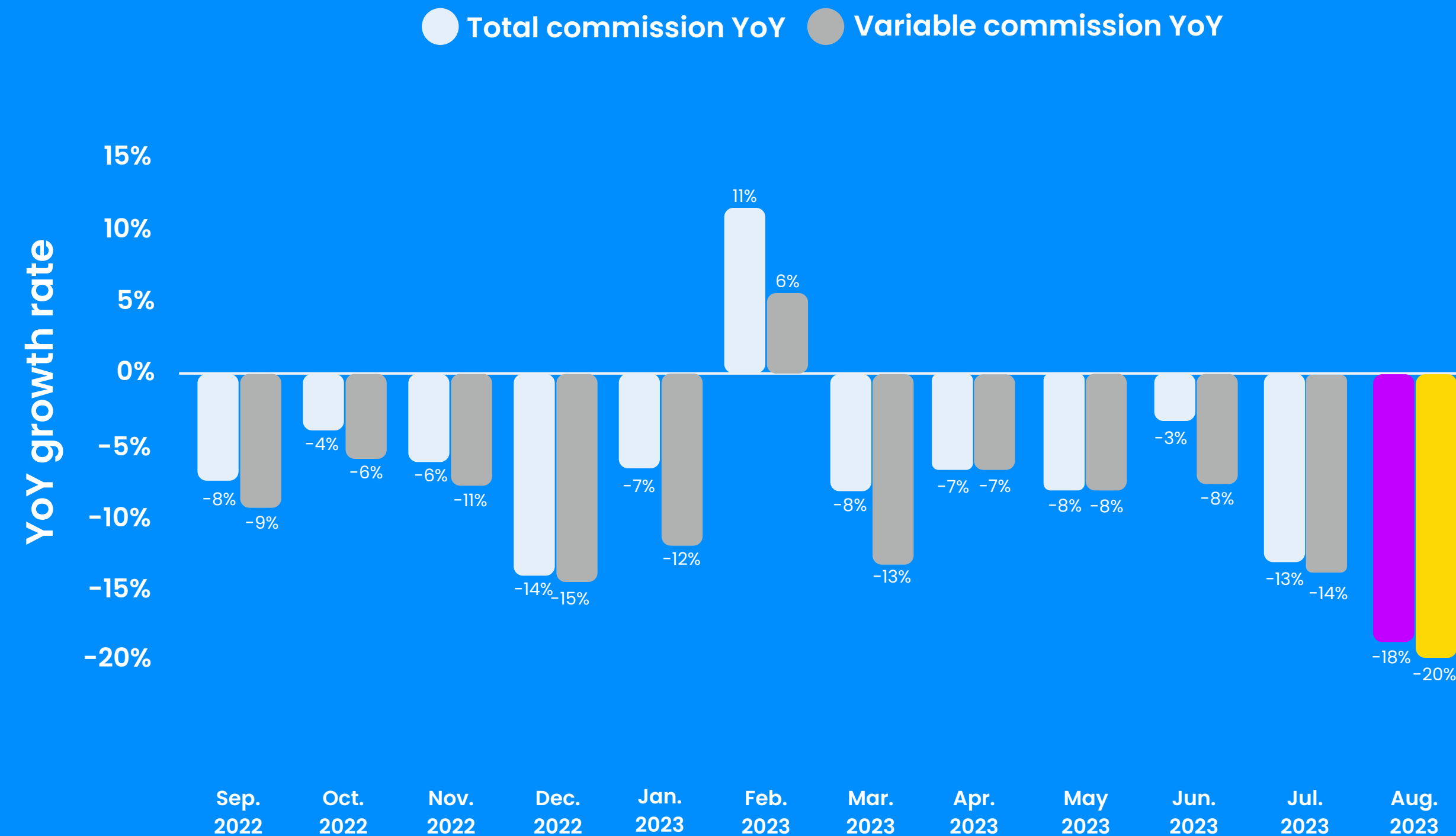
5



In august, the 14% decrease in revenue was driven by 26% decrease in clicks and a 3% decrease in conversion rate. However, average order value was up significantly at 20% YoY.

Monthly commission trends

6



-20%

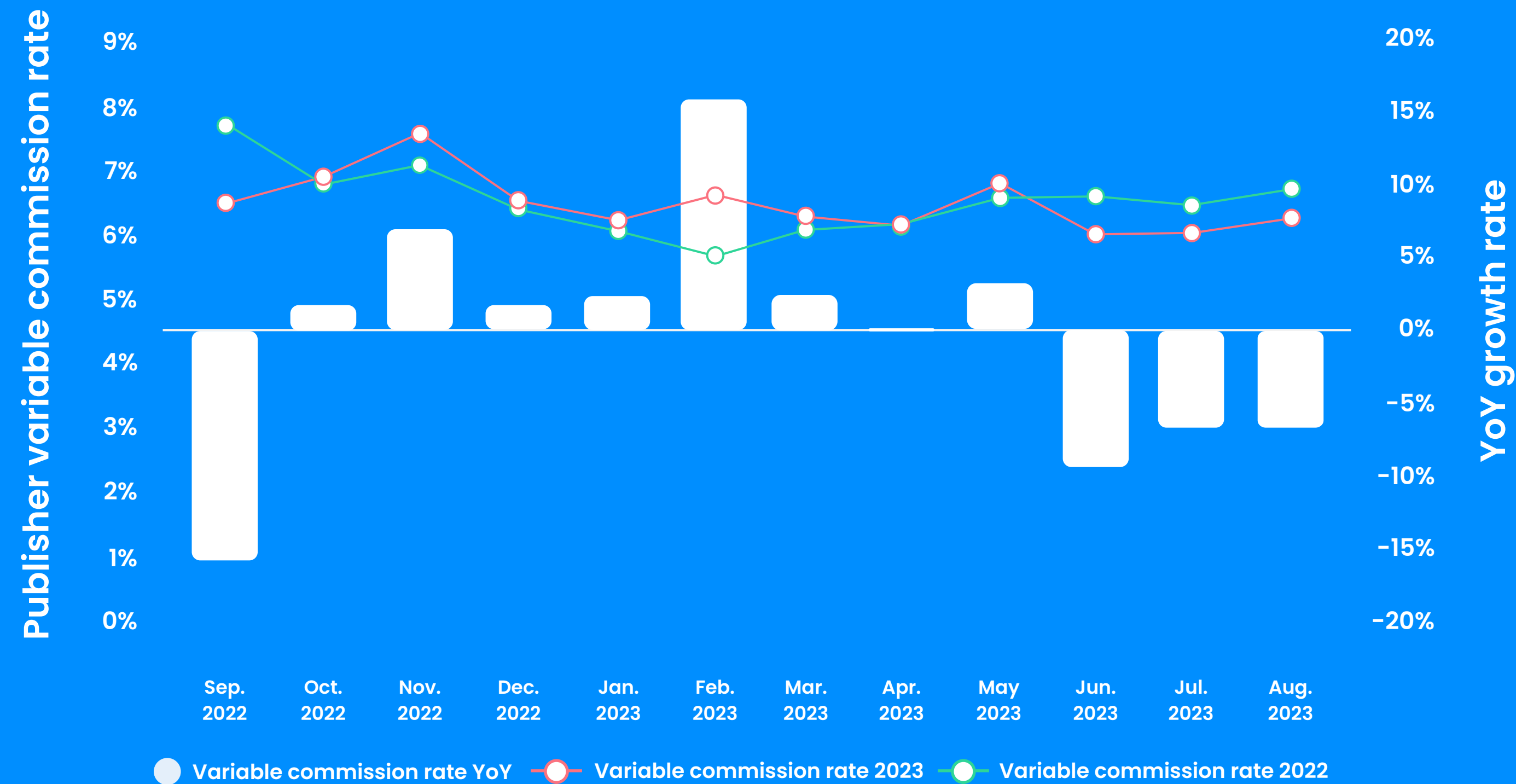
-18%

In September 2023, variable commission is down 18% YoY, and total commission is down 20% YoY.

- Commissions paid to publishers are comprised of two types:
 1. "Variable Commission" is defined as a percentage of revenue or conversion
 2. "Bonus Commission" is defined as a flat amount typically associated with paid placements or media buys
- "Total Commission" is defined as the total of "Variable commission" plus "Bonus commission"

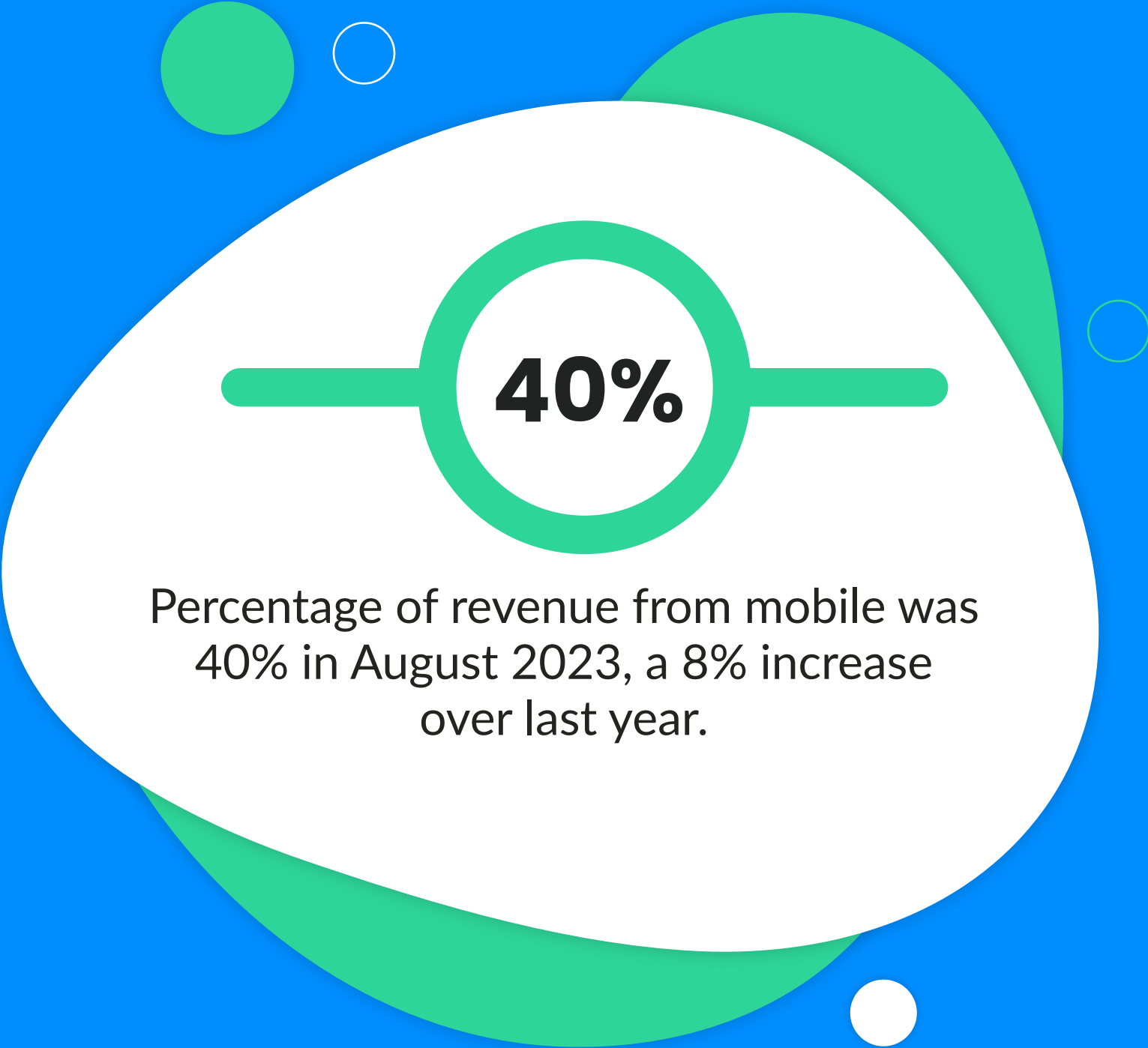
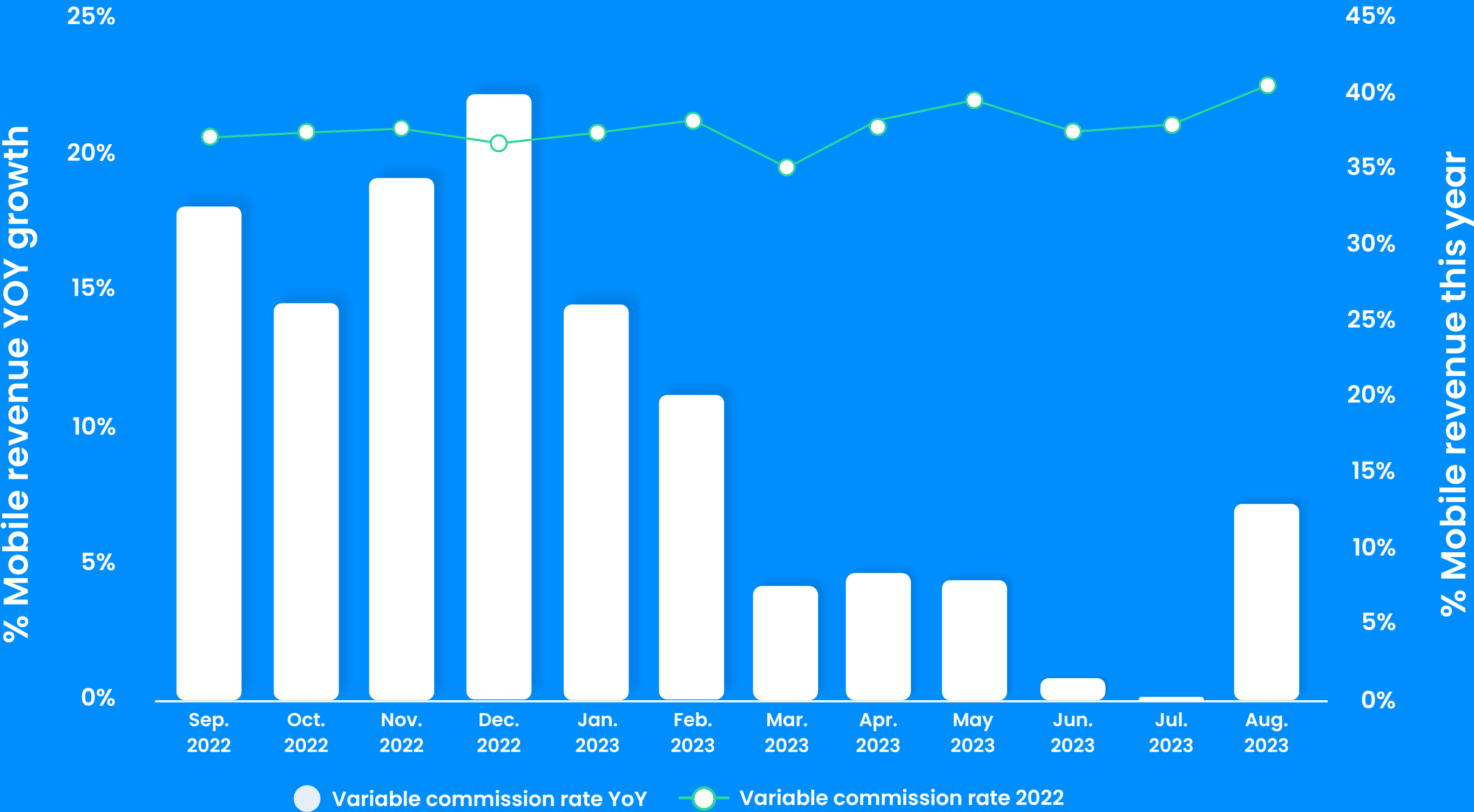
Monthly variable commission rates trends

Variable commission rate and growth YoY

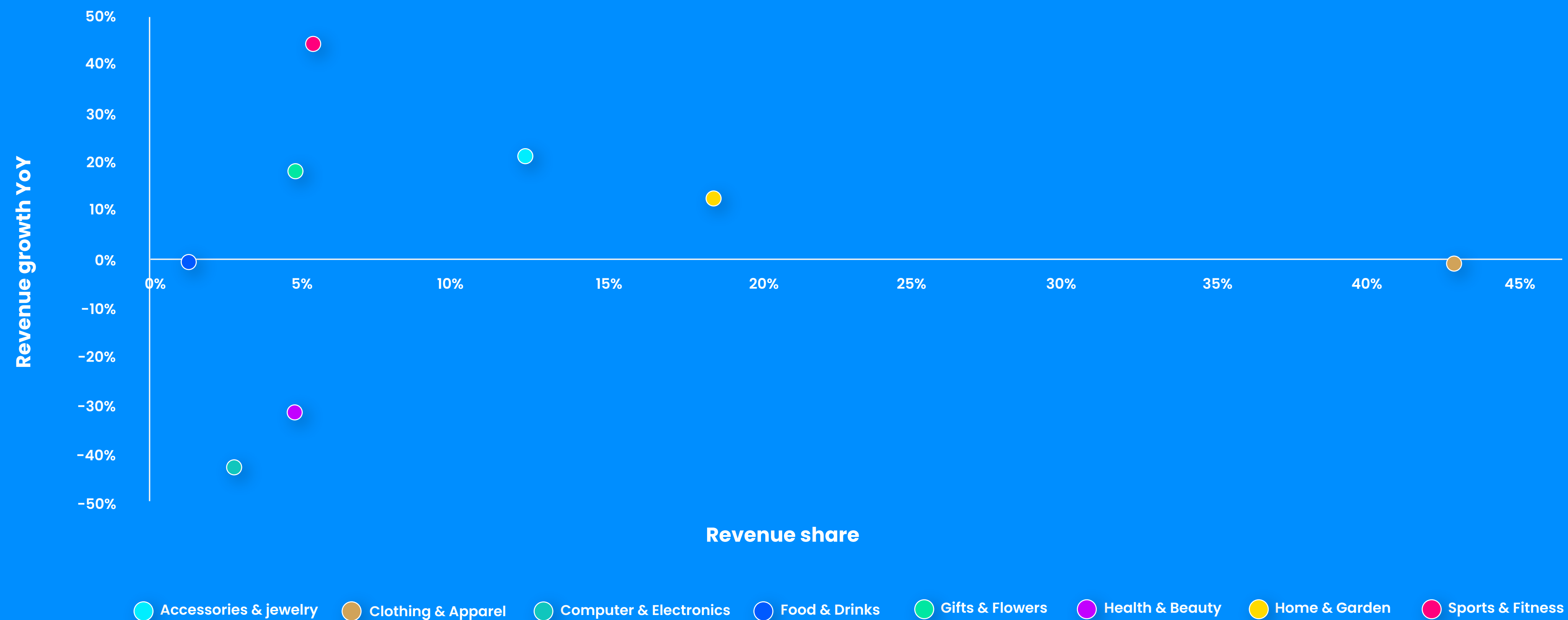


Monthly mobile revenue share

% of revenue from mobile



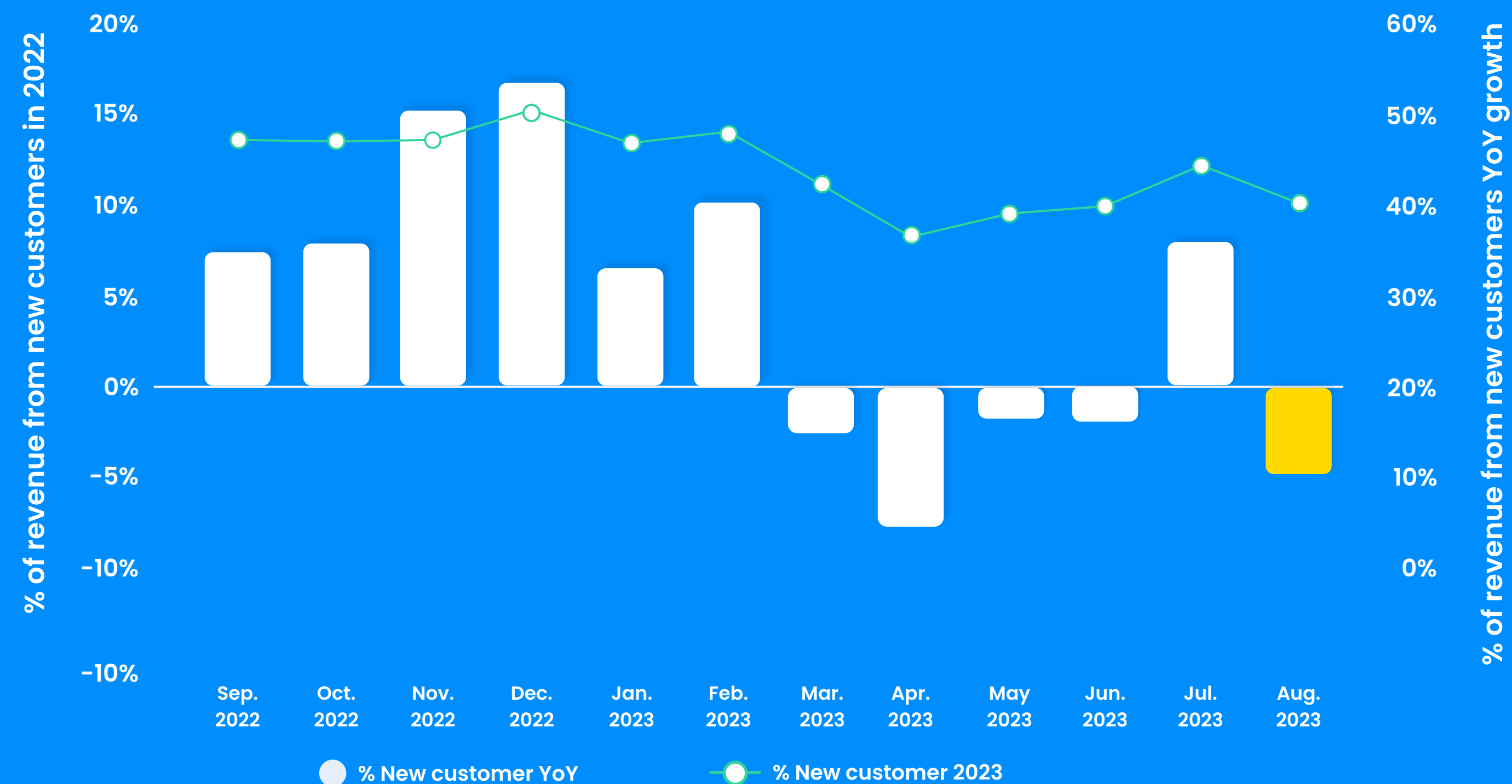
Revenue growth by advertiser vertical



Monthly new customer revenue share

10

% of revenue from new customers



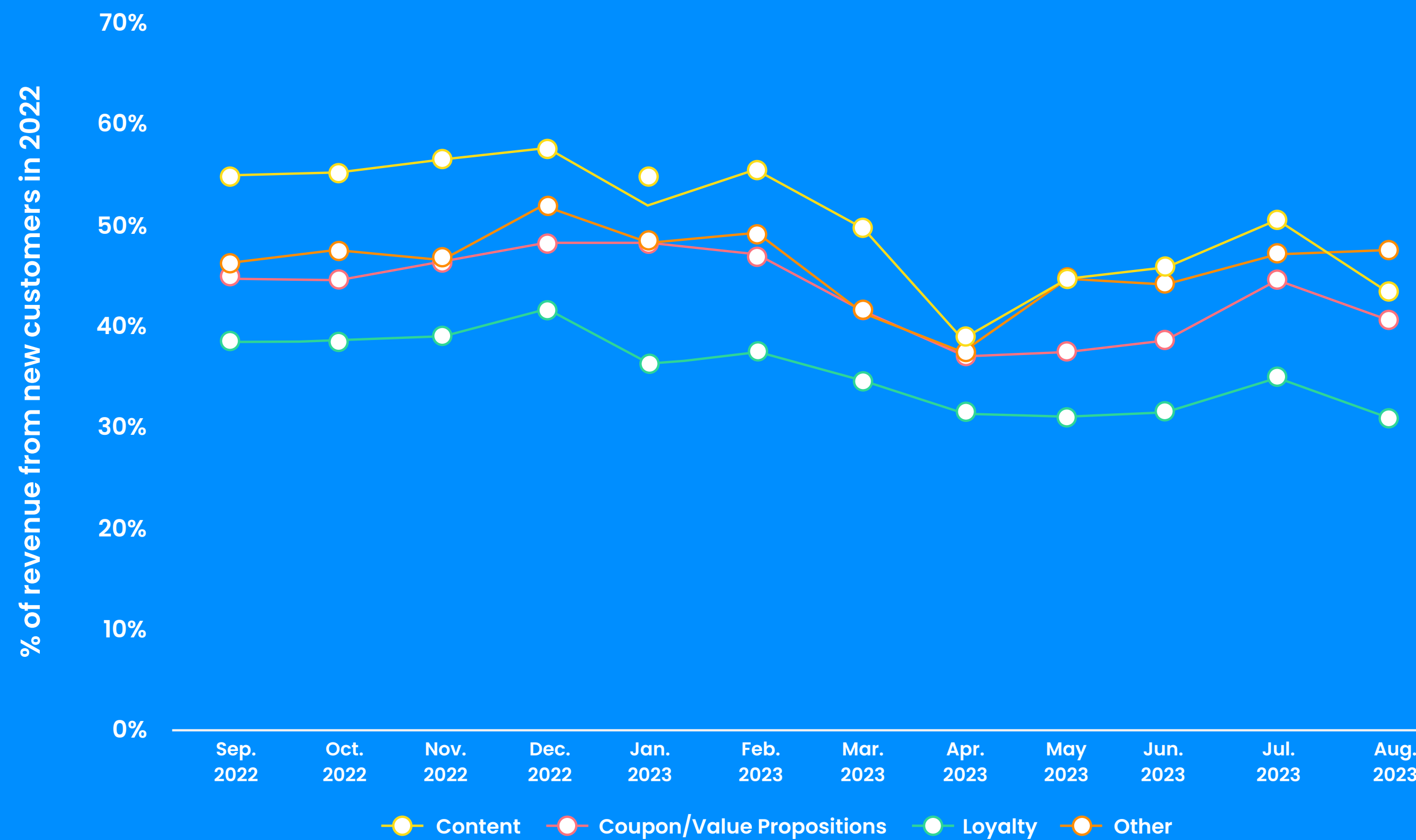
40%

In August 2023, the percentage of revenue acquired from new customers is 40%, slightly down compared to July and a 4% YoY decrease.

New customer revenue by publisher category

11

% of revenue from new customers in past 12 months by publisher category



47%

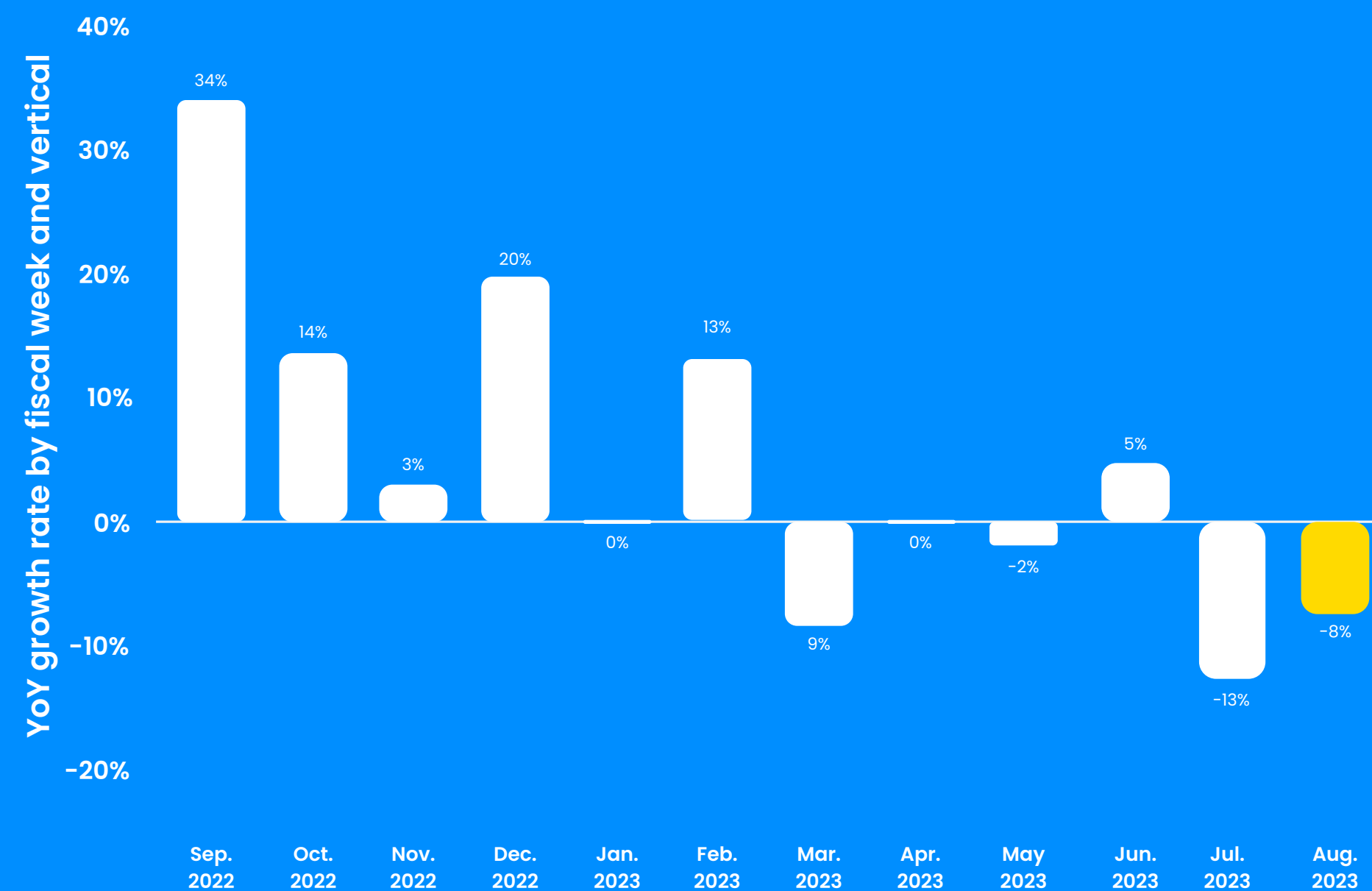
In August 2023, the percentage of revenue from new customers by partner category is as follows:

Other 47% Content 43.5%
Coupon 41% Loyalty 31.1%

Content publisher YoY revenue and commission trends

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Content publisher revenue YoY growth rate



Growth in the content partner category has decreased 8% in August 2023.

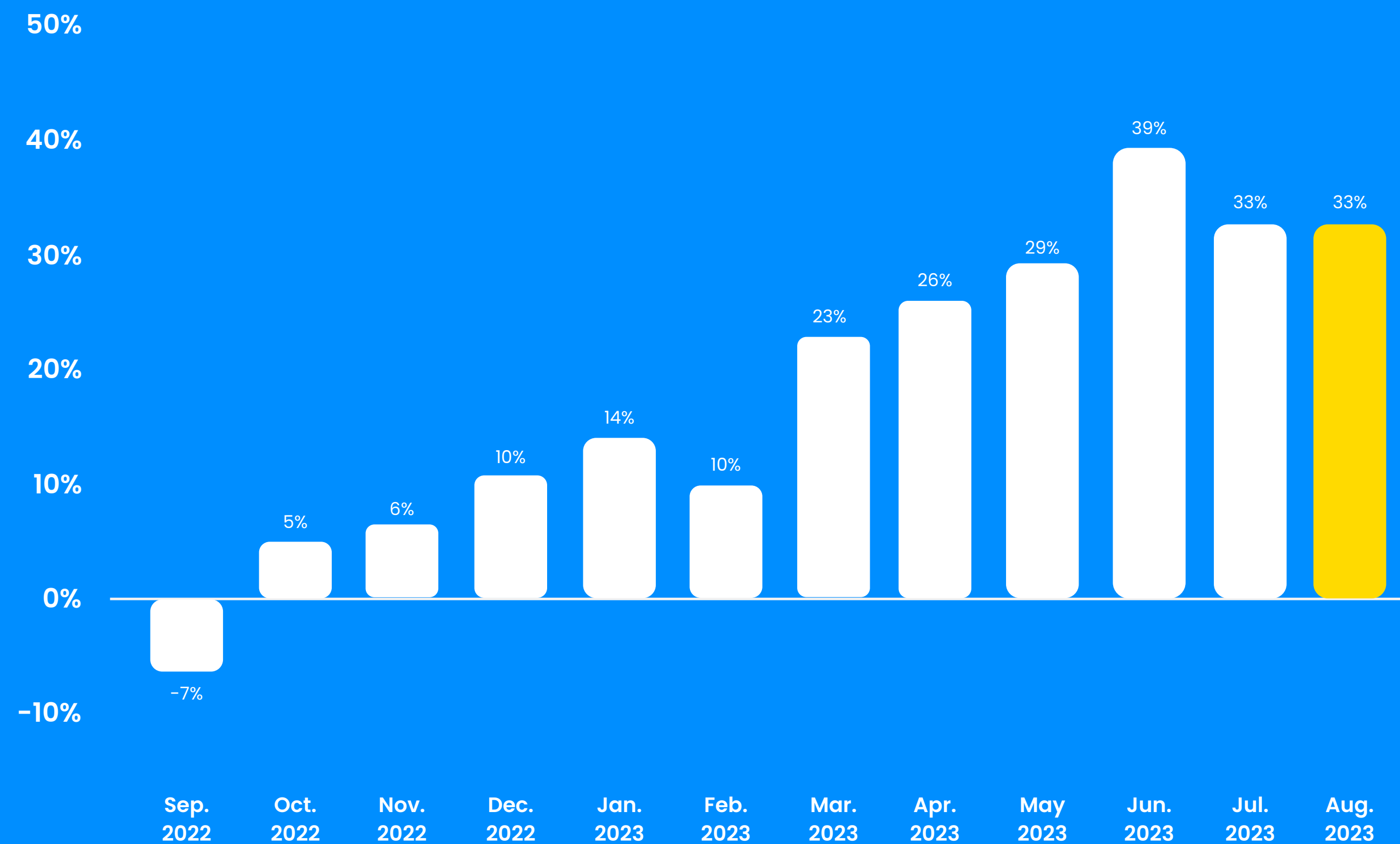
Content publisher share of variable commission



In August 2023, share of commission for content partners is 51%, down 1% YoY.

Publisher partner application growth YoY

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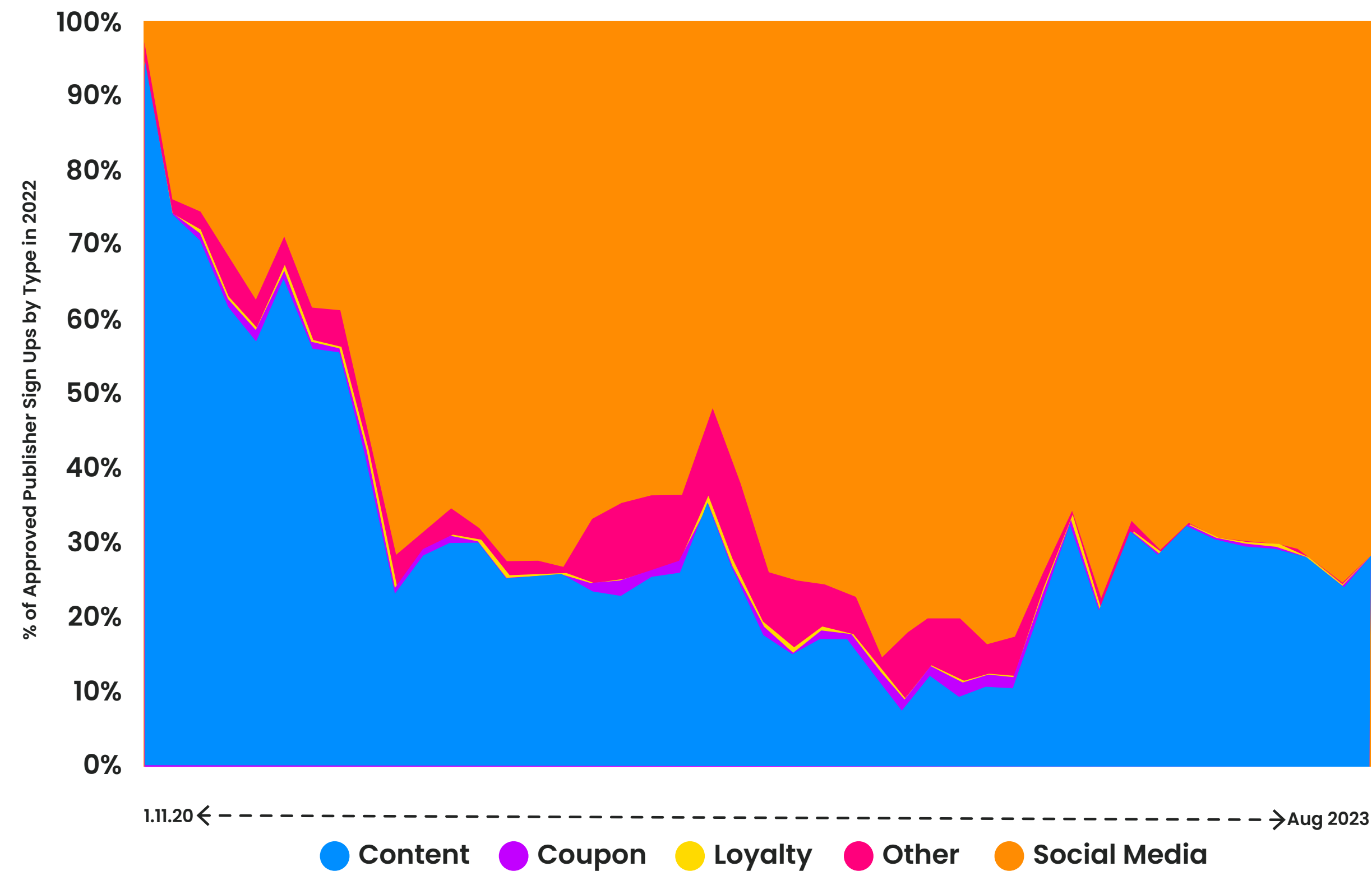


33%

Partner application increased 33% YoY in August 2023, consistent with other months in 2023.

% of approved publisher sign ups by type

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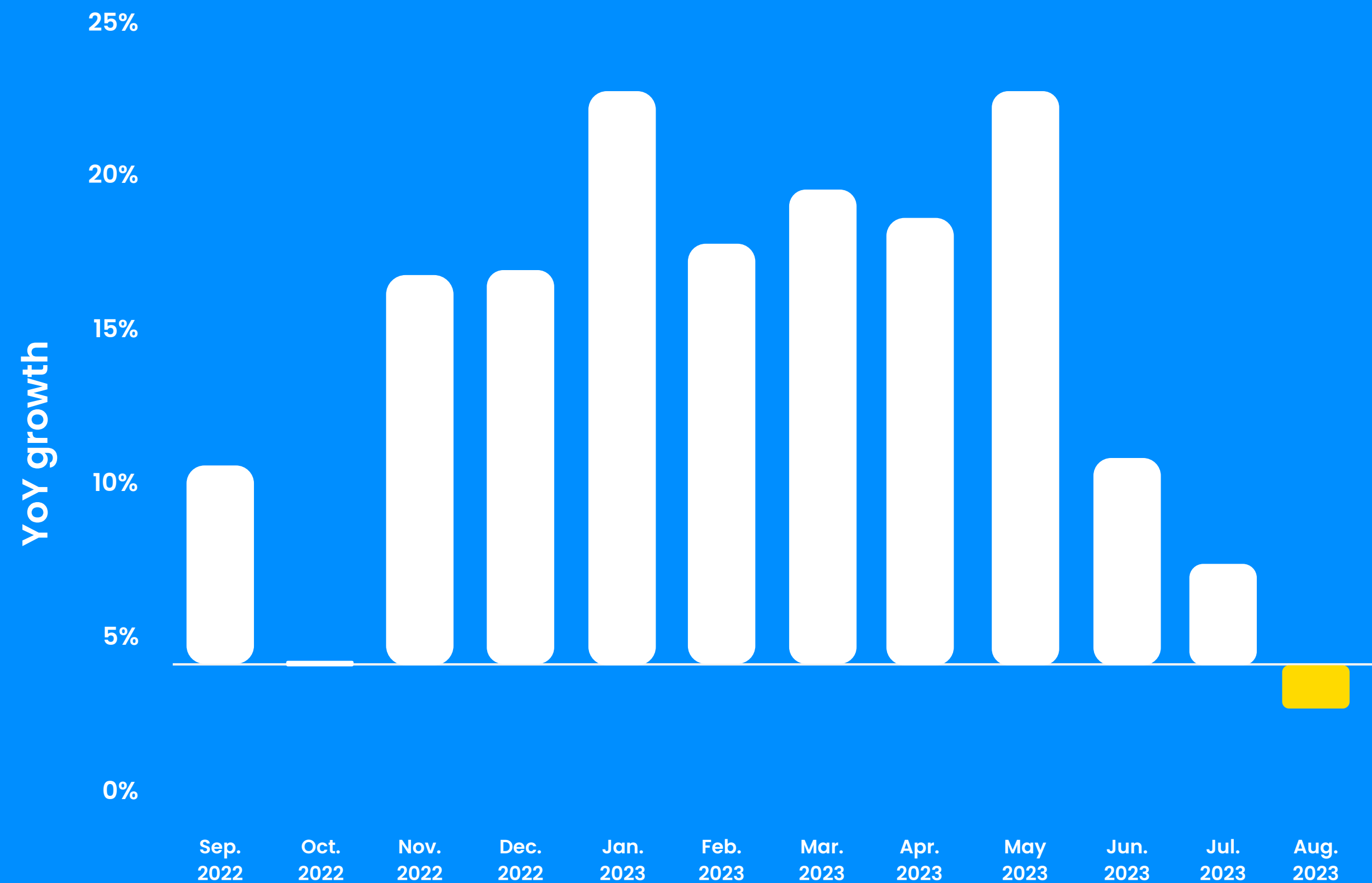


Social Media and Content partners make up the majority of new publishers joining the Ascend™ network.

The trends have remained pretty consistent throughout 2023.

Average revenue generating connections per advertiser

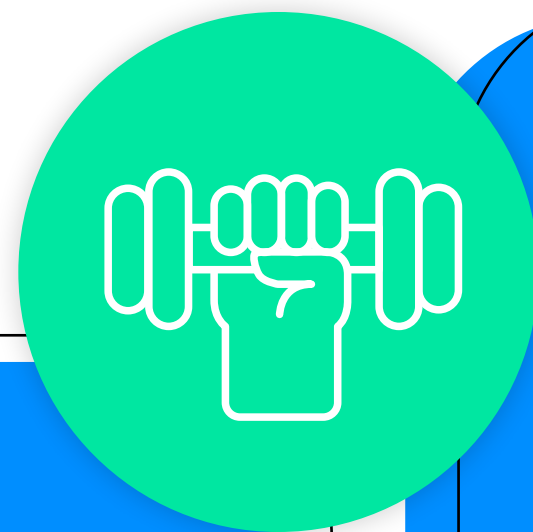
15



4%

In the month of August, we saw a 4% increase YoY in the average number of connections per advertiser.

Insights by vertical.

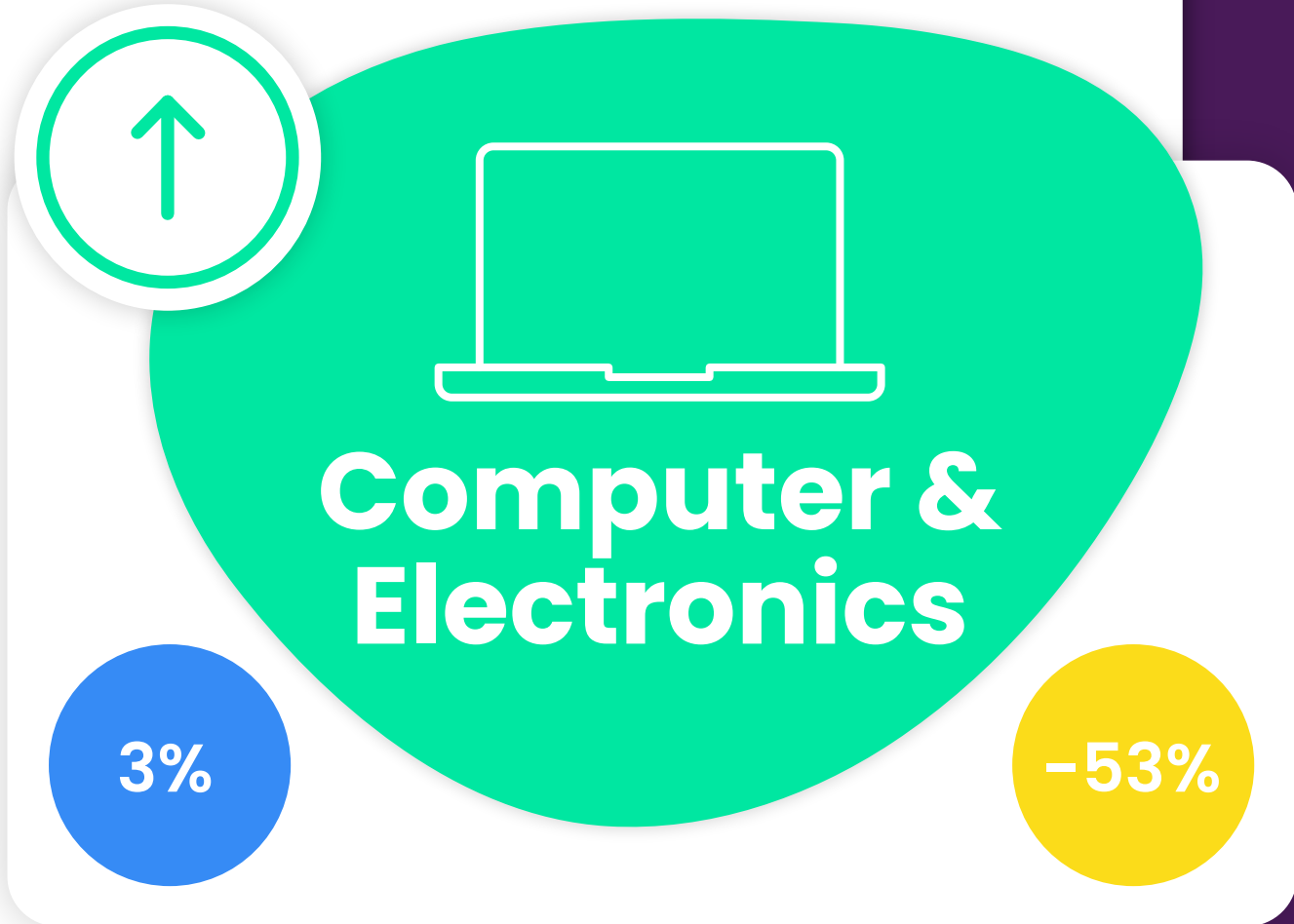


Click and revenue YoY growth rate by vertical

All data represents YoY growth for the end of August 2023.

Revenue Growth YoY

Revenue share YoY

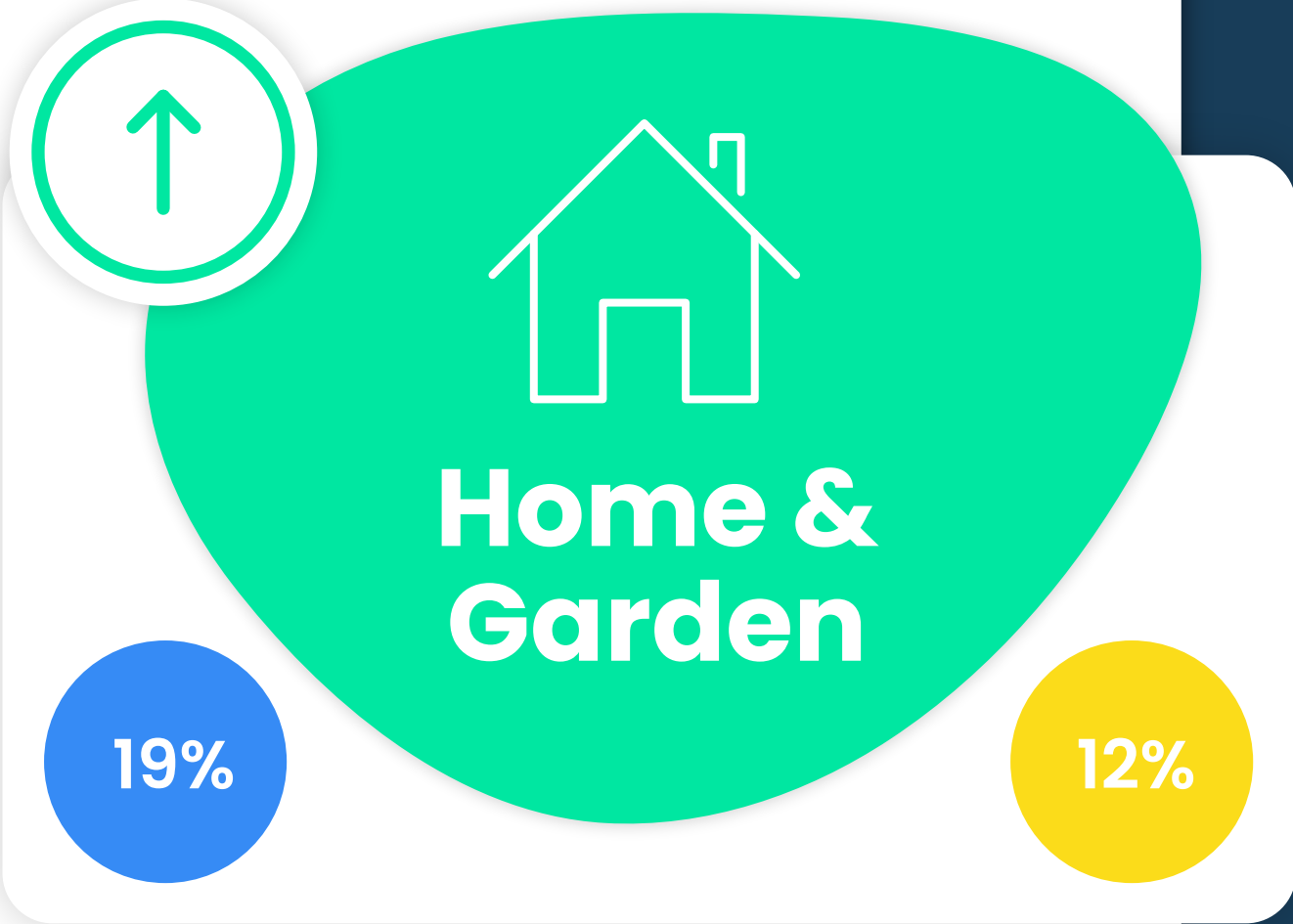
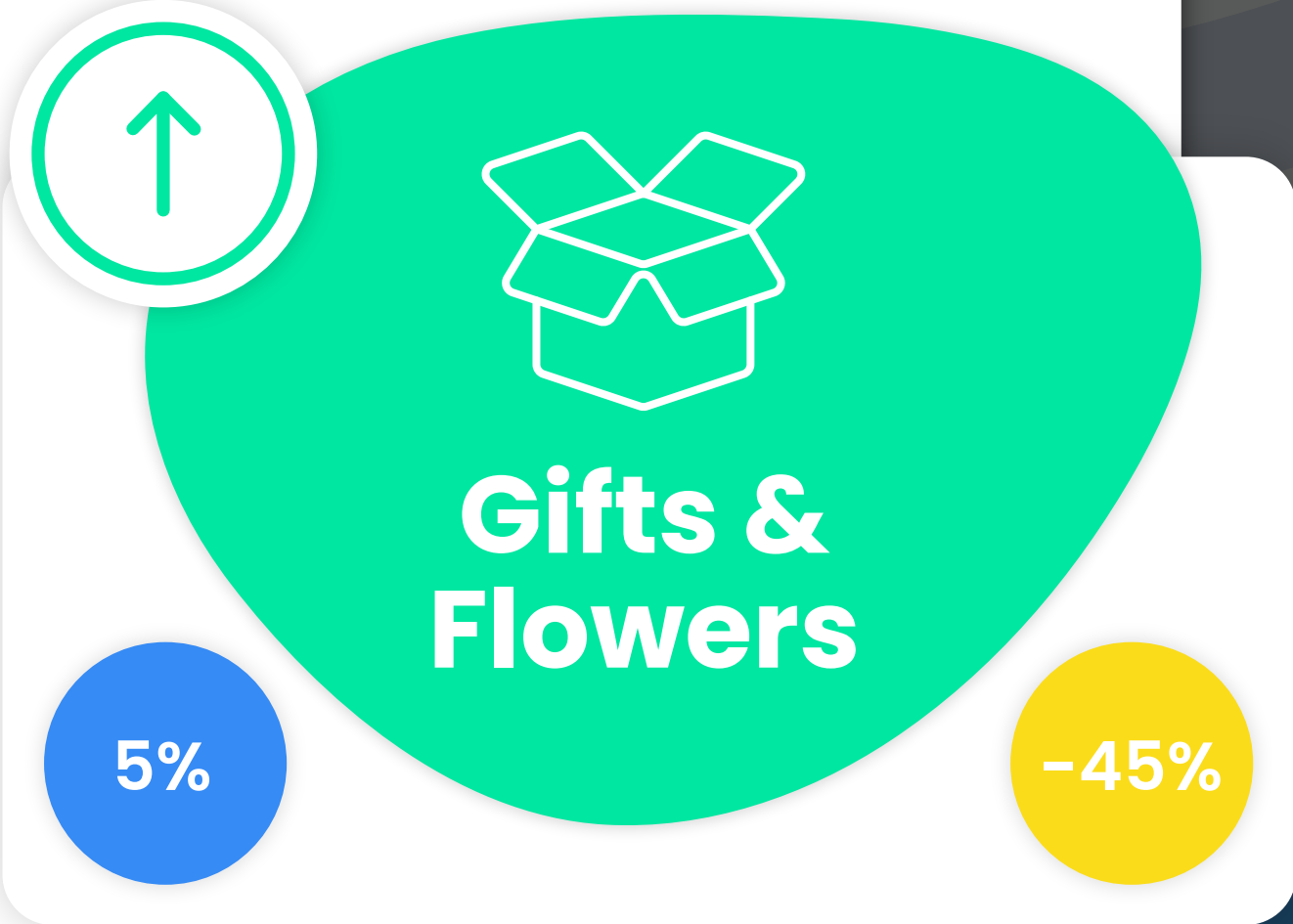


Click and revenue YoY growth rate by vertical

All data represents YoY growth for the end of August 2023.

Revenue Growth YoY

Revenue share YoY





A better way to partner.

Interested in learning more
with a Partnerize expert?

Contact us at

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