



Partnerize

U.S. Retail Affiliate Marketing Sales Index

Updated through July 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 July 2023

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Surging

Home & Garden



+5% YoY

Travel



+76% YoY

Sports & Fitness



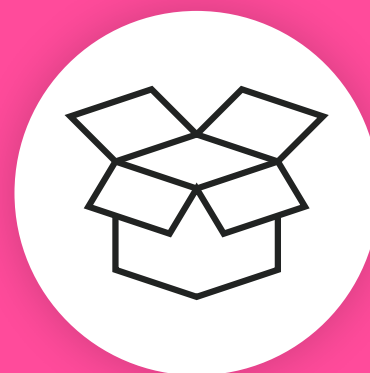
+16% YoY

Food & Drink



-24% YoY

Gifts & Flowers



-6% YoY

Health & Beauty



-47% YoY

Clothing
& Apparel



-16% YoY

Computers
& Electronics



-32% YoY

Accessories & Jewelry

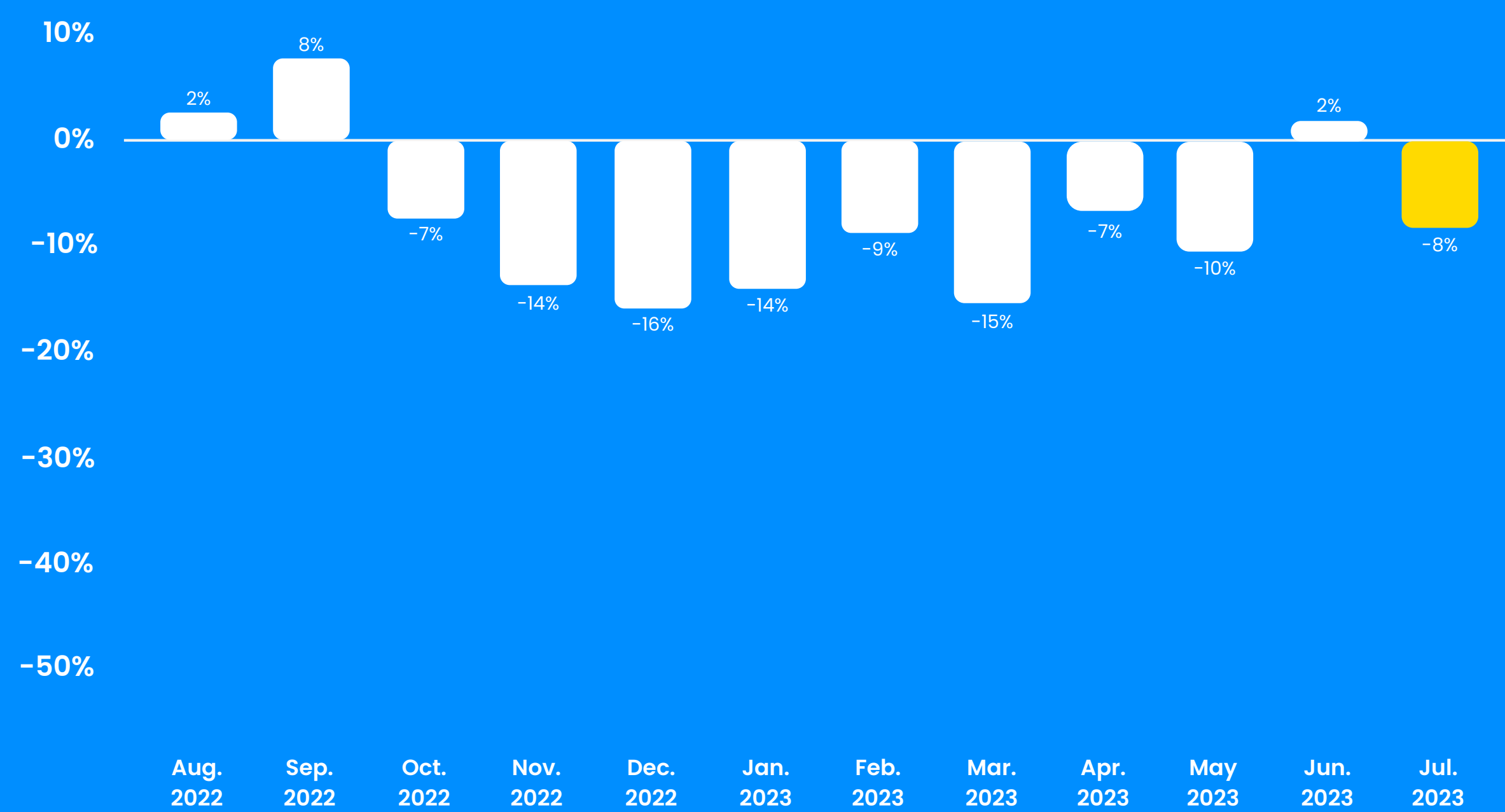


-2% YoY

Decreasing

Monthly revenue trends

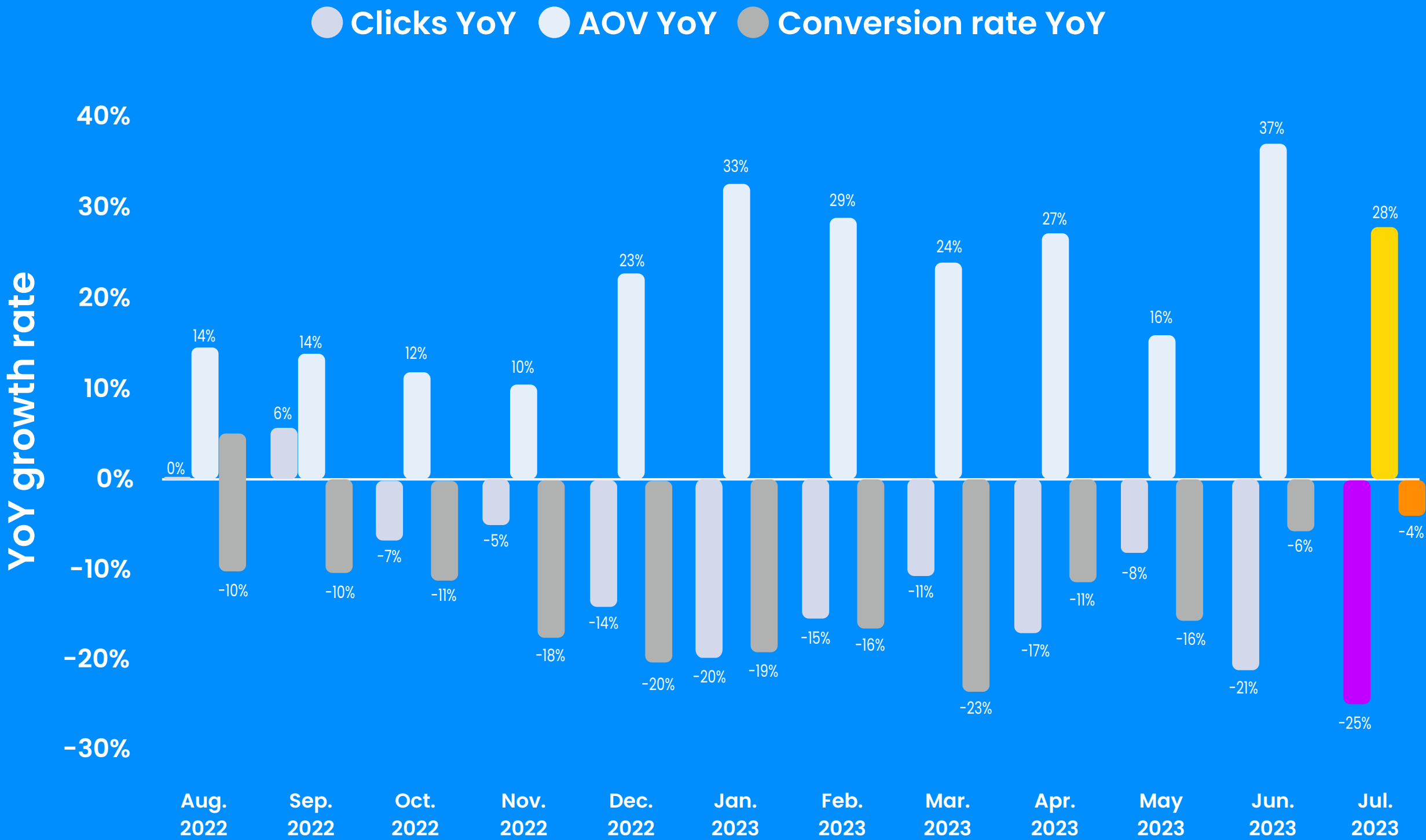
Gross Revenue YoY Growth



-8%

July saw an 8% YoY decrease in revenue.

Drivers of monthly revenue growth



Clicks
-25%

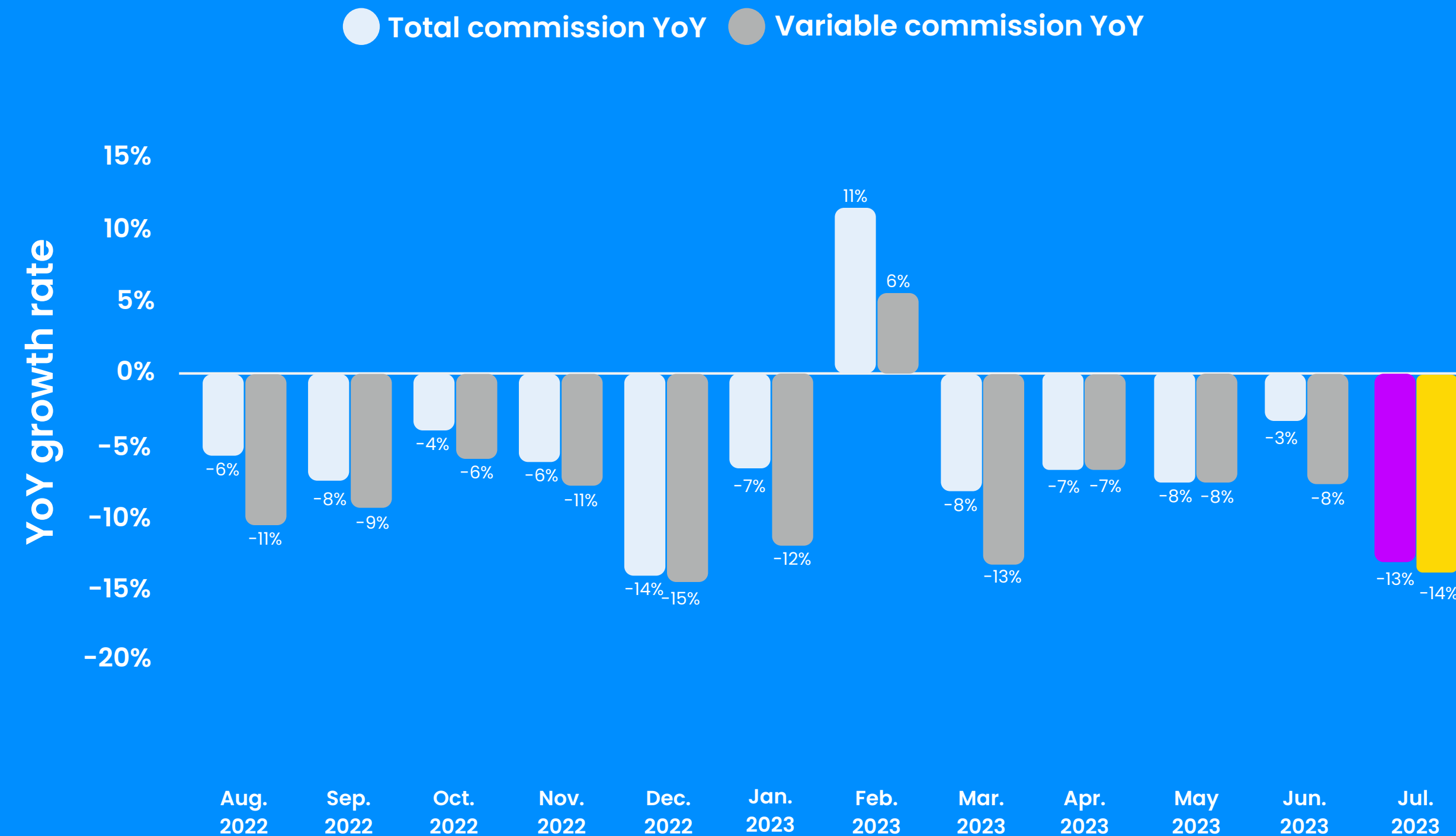
Conversion rate
-4%

AOV
+28%

The July 2023 decrease in revenue was driven by a 25% YoY decrease in clicks and a 4% YoY decrease in conversion rate. However, average order value saw a 28% YoY increase suggesting that customers, on average, are spending more money per order.

Monthly commission trends

6



-14% **-13%**

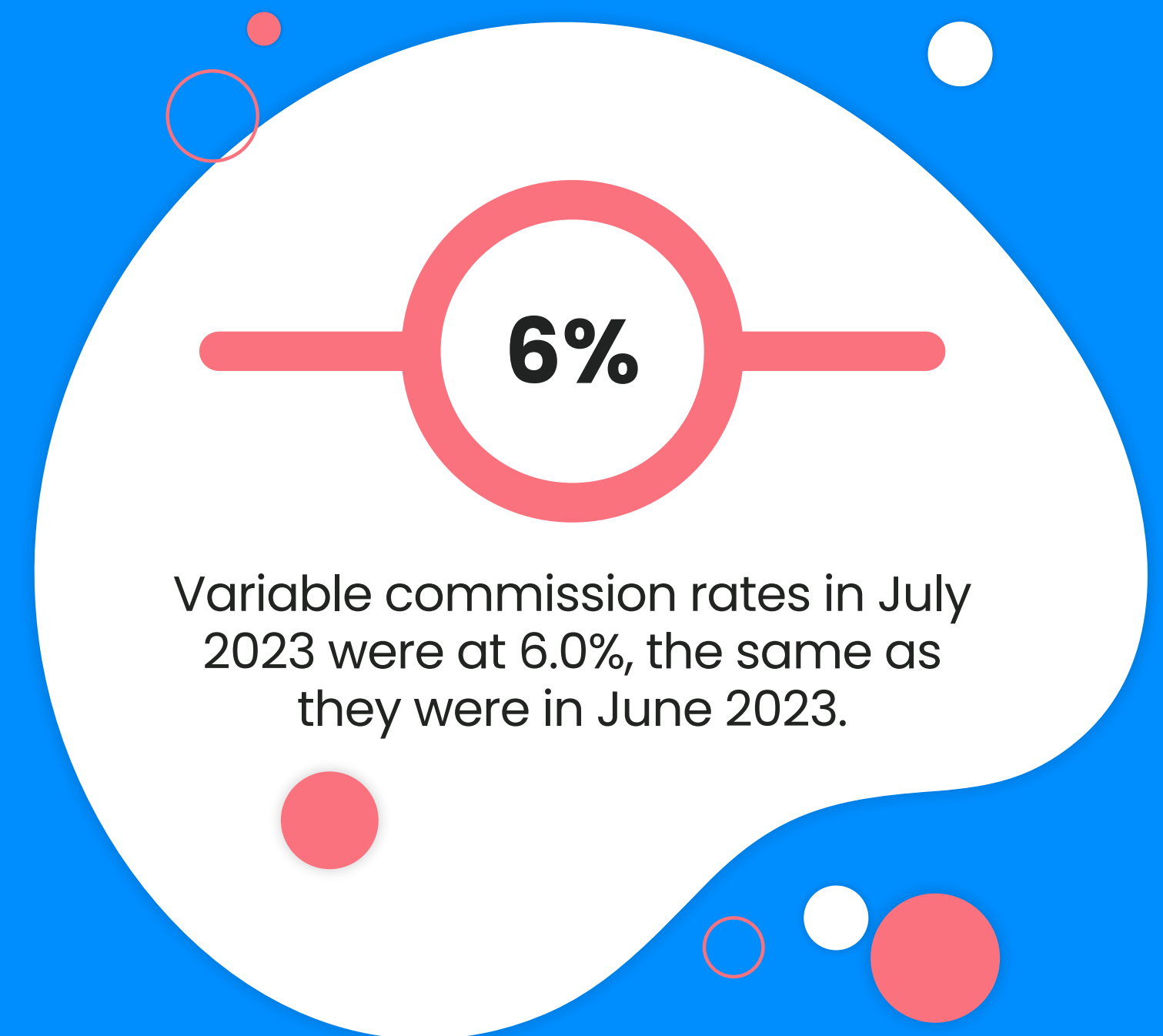
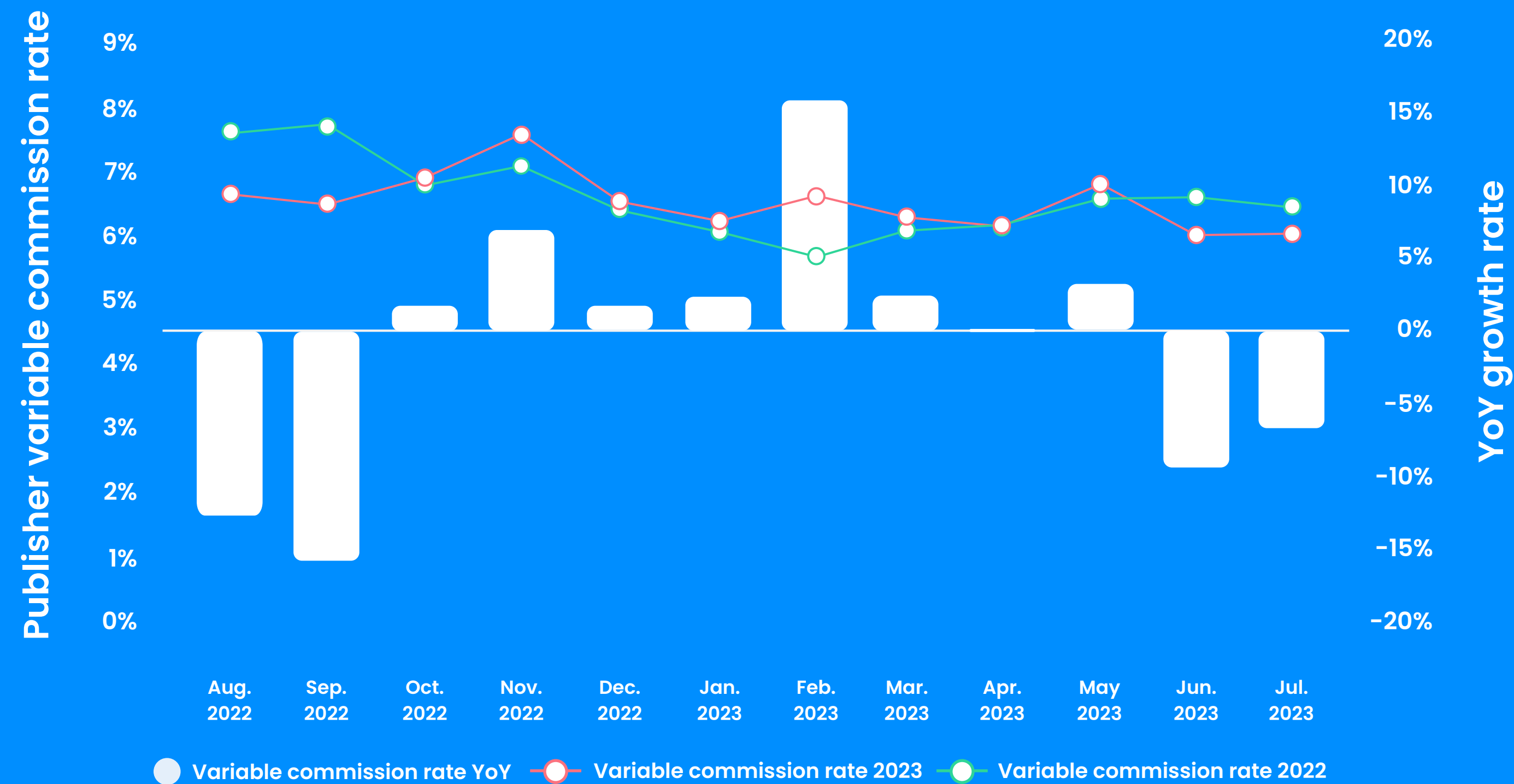
In July 2023 variable commission is down 14% YOY, and total commission is down 13%.

- 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

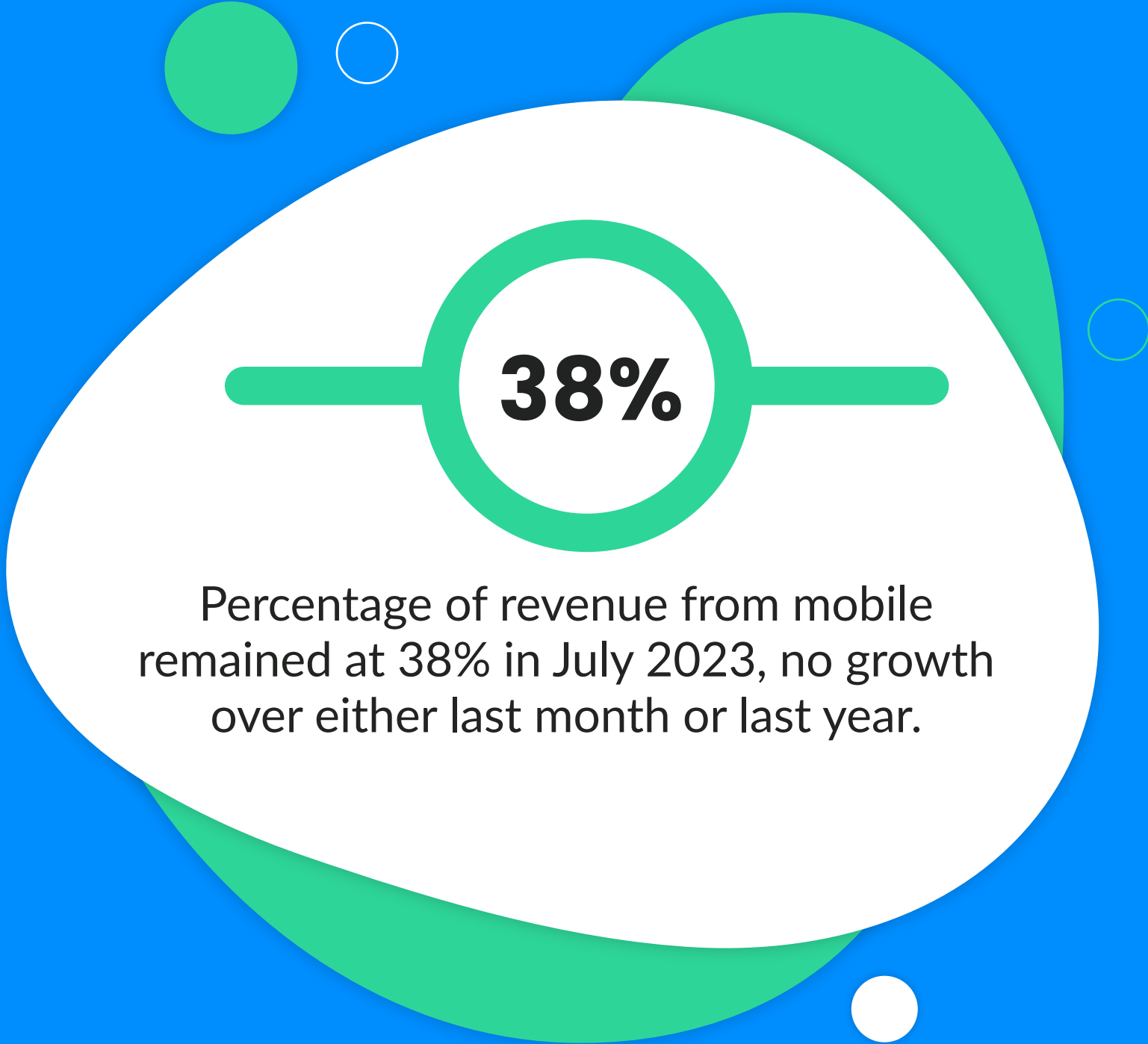
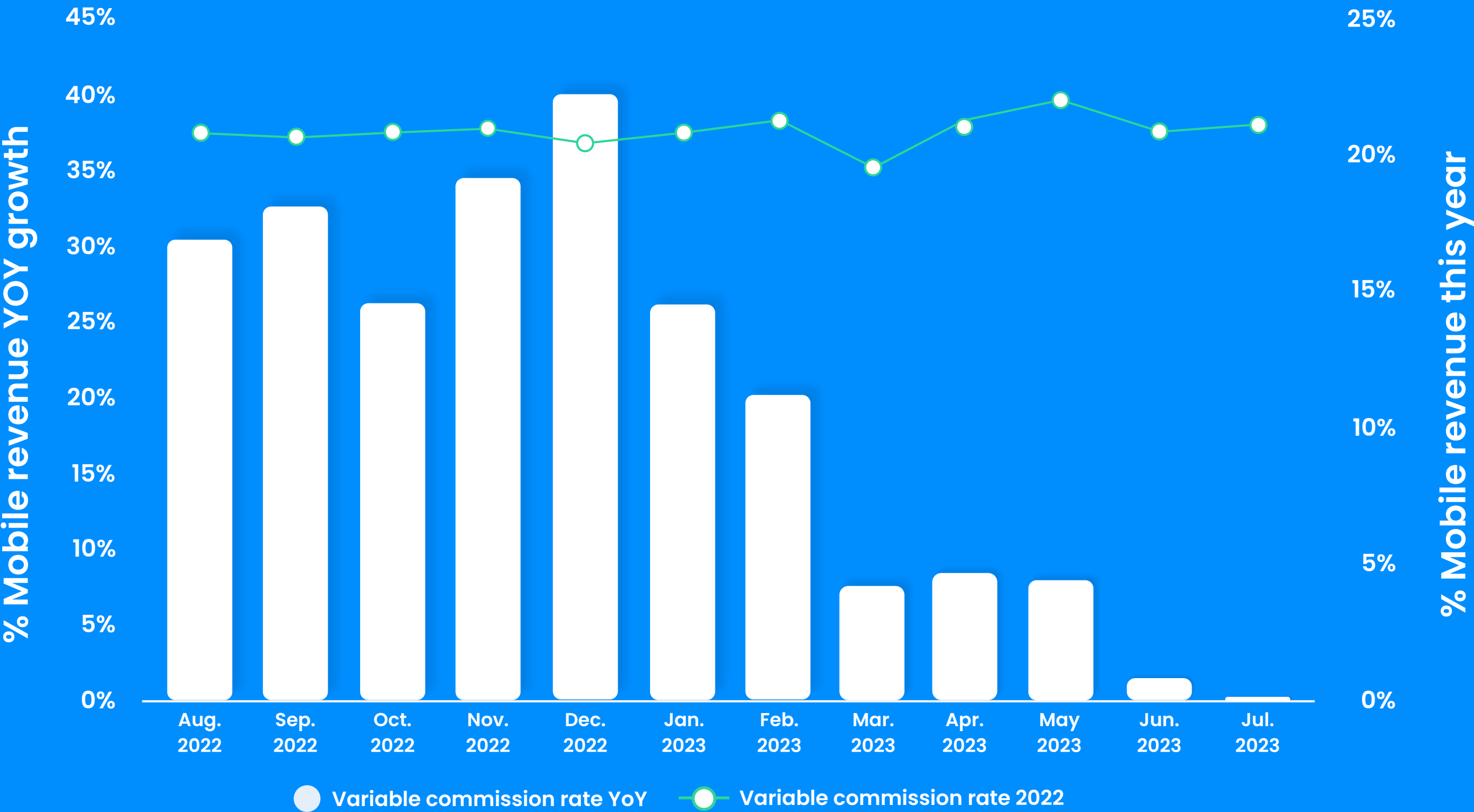
7

Variable commission rate and growth YoY

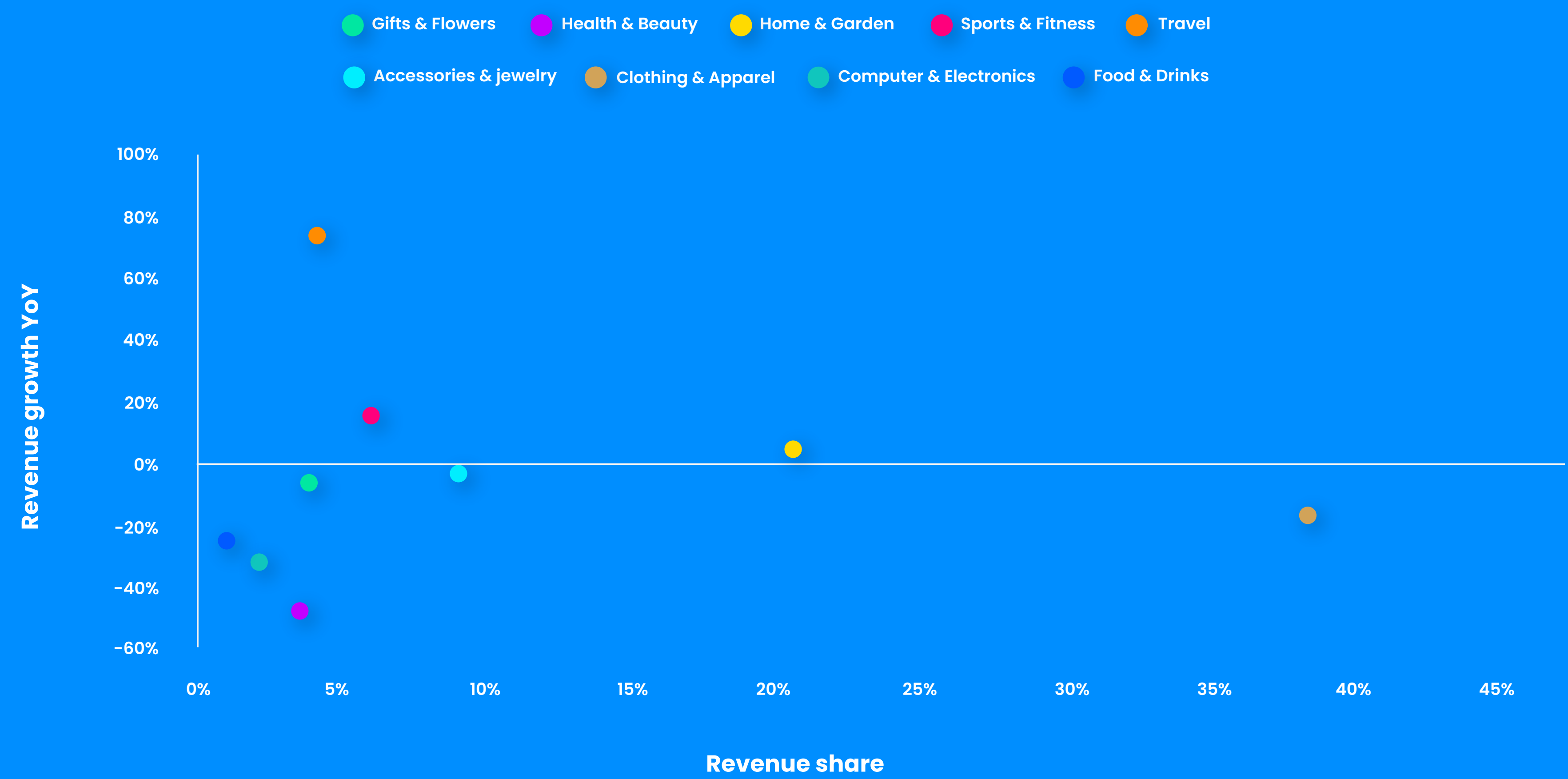


Monthly mobile revenue share

% of revenue from mobile



Revenue growth by advertiser vertical



Monthly new customer revenue share

10

% of revenue from new customers



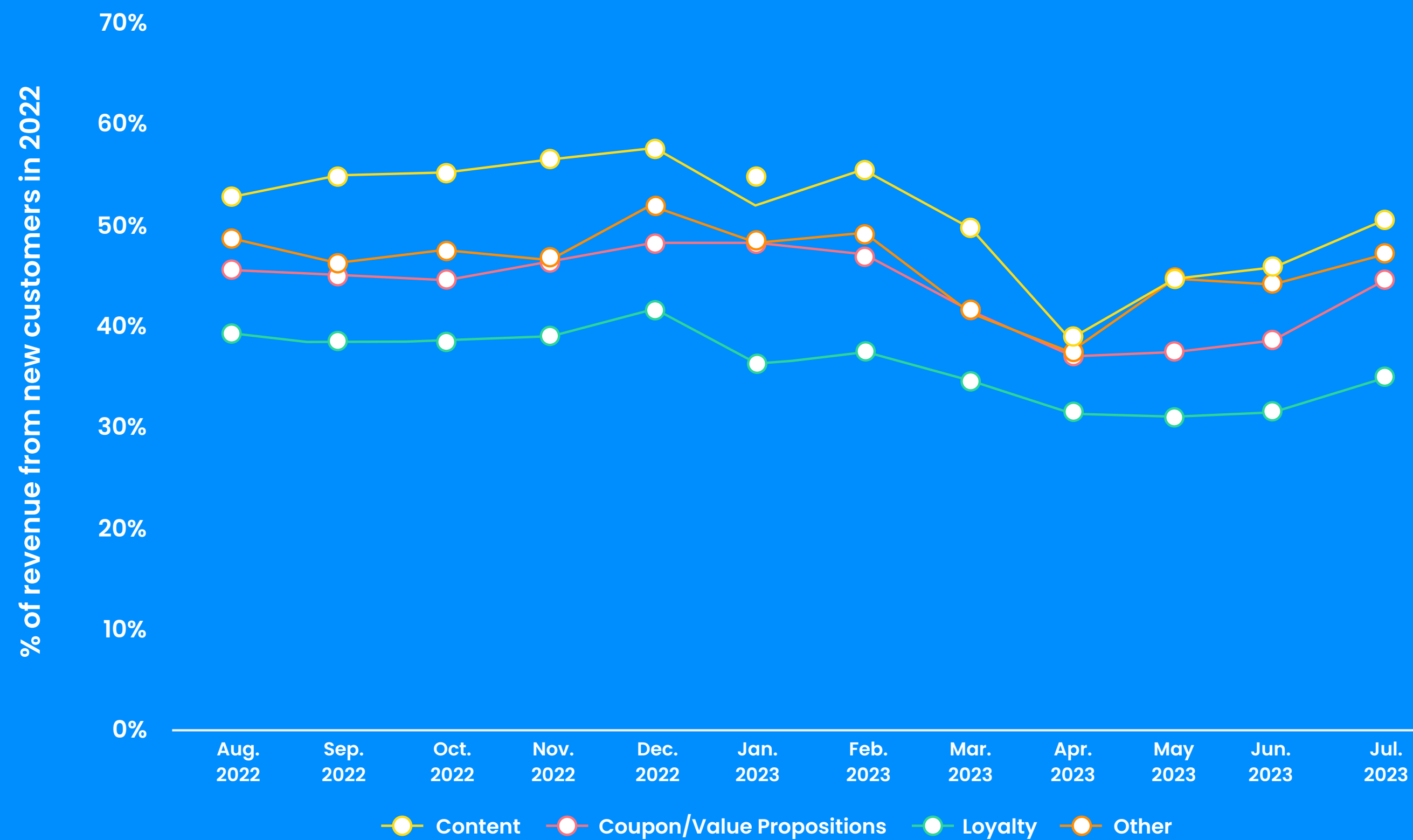
8%

In July 2023, the percentage of revenue acquired from new customers is now at 45%, up from 40% in June, an 8% YoY increase.

New customer revenue by publisher category

11

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



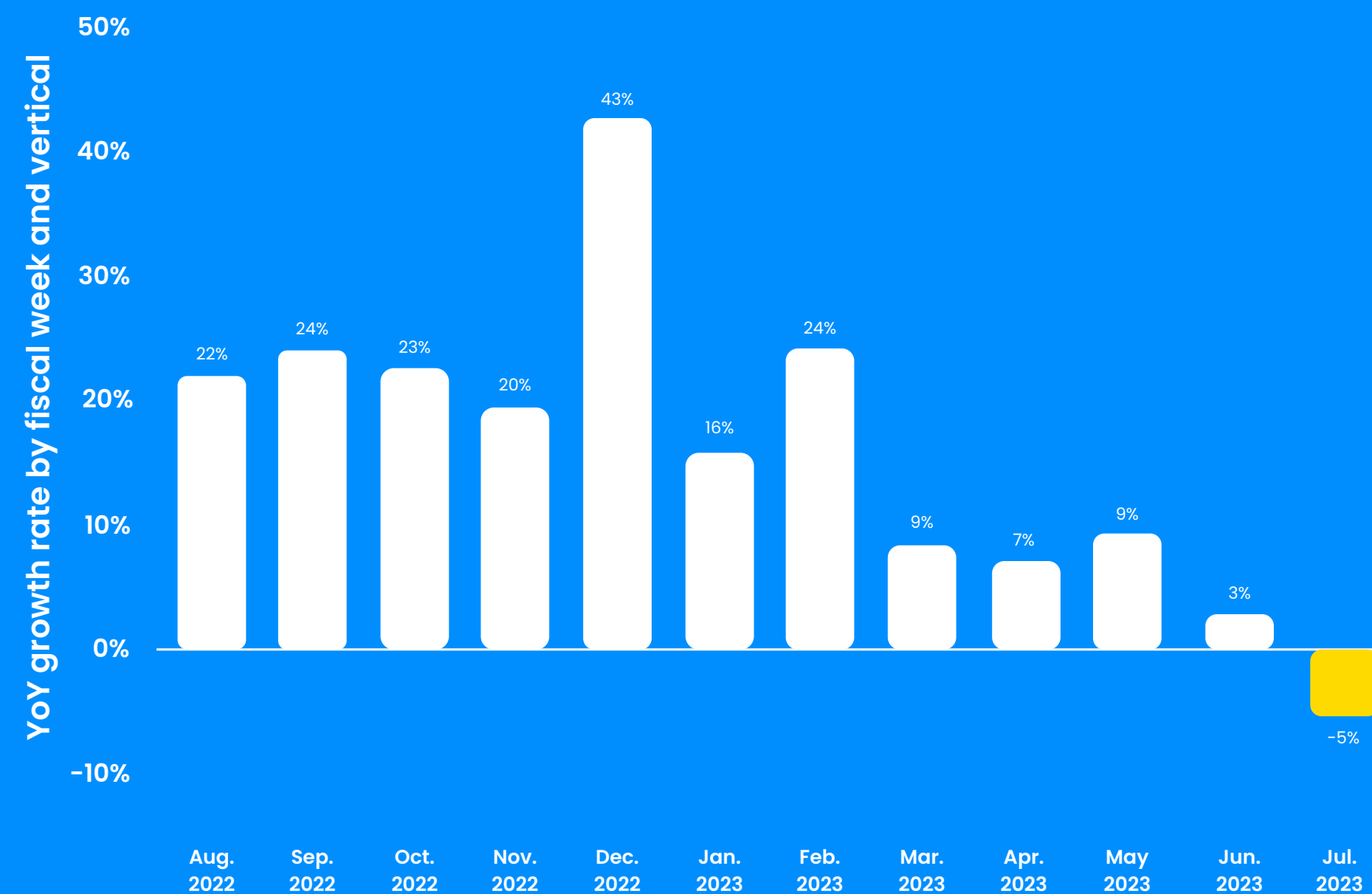
46%

Content partners have a new customer rate of 51% followed by Other at 47%, Coupon at 44%, and Loyalty at 35%.

Content publisher YoY revenue and commission trends

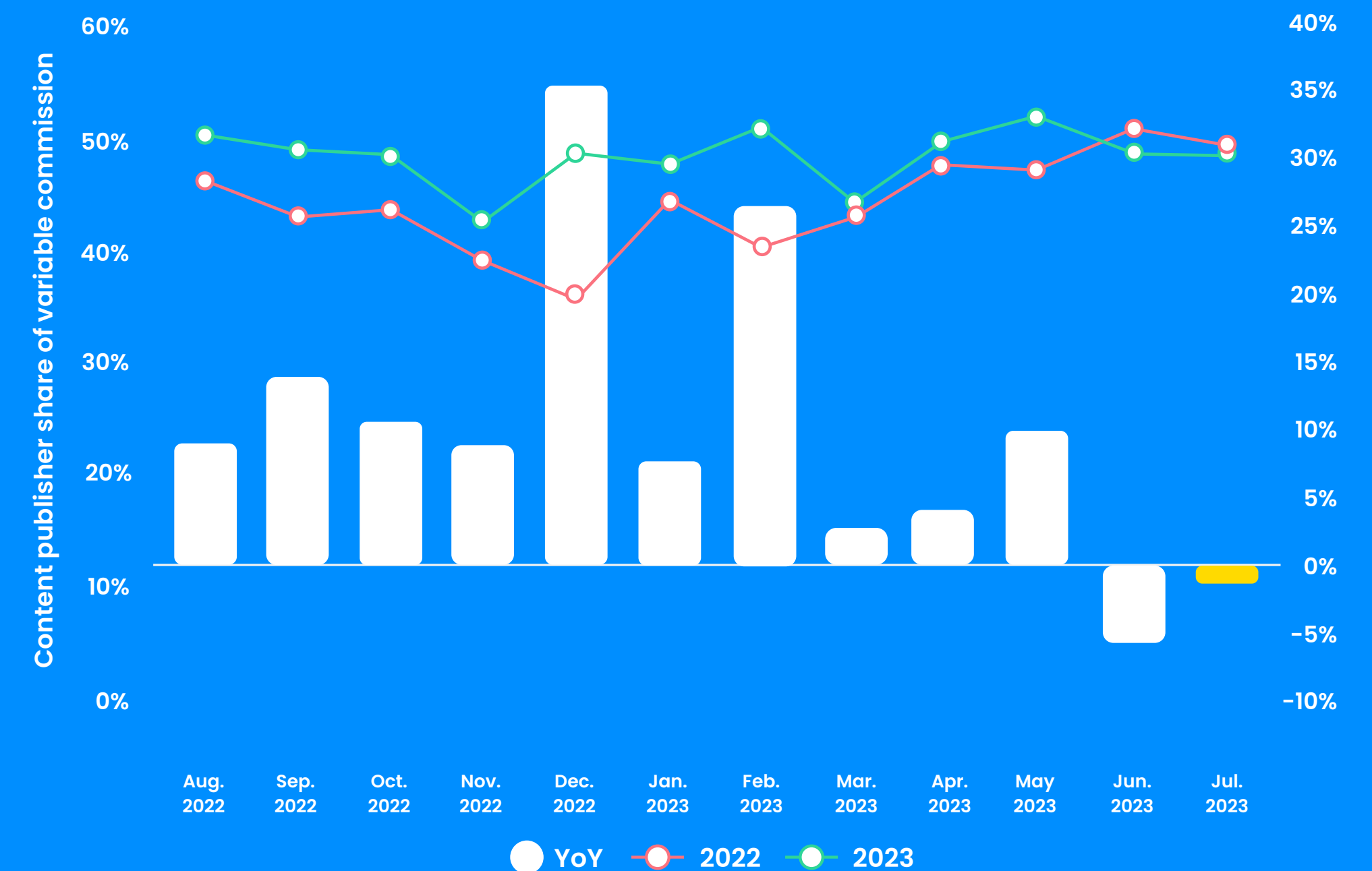
12

Content publisher revenue YoY growth rate



For the first time this year, growth in the content partner category has declined by 5% in July 2023.

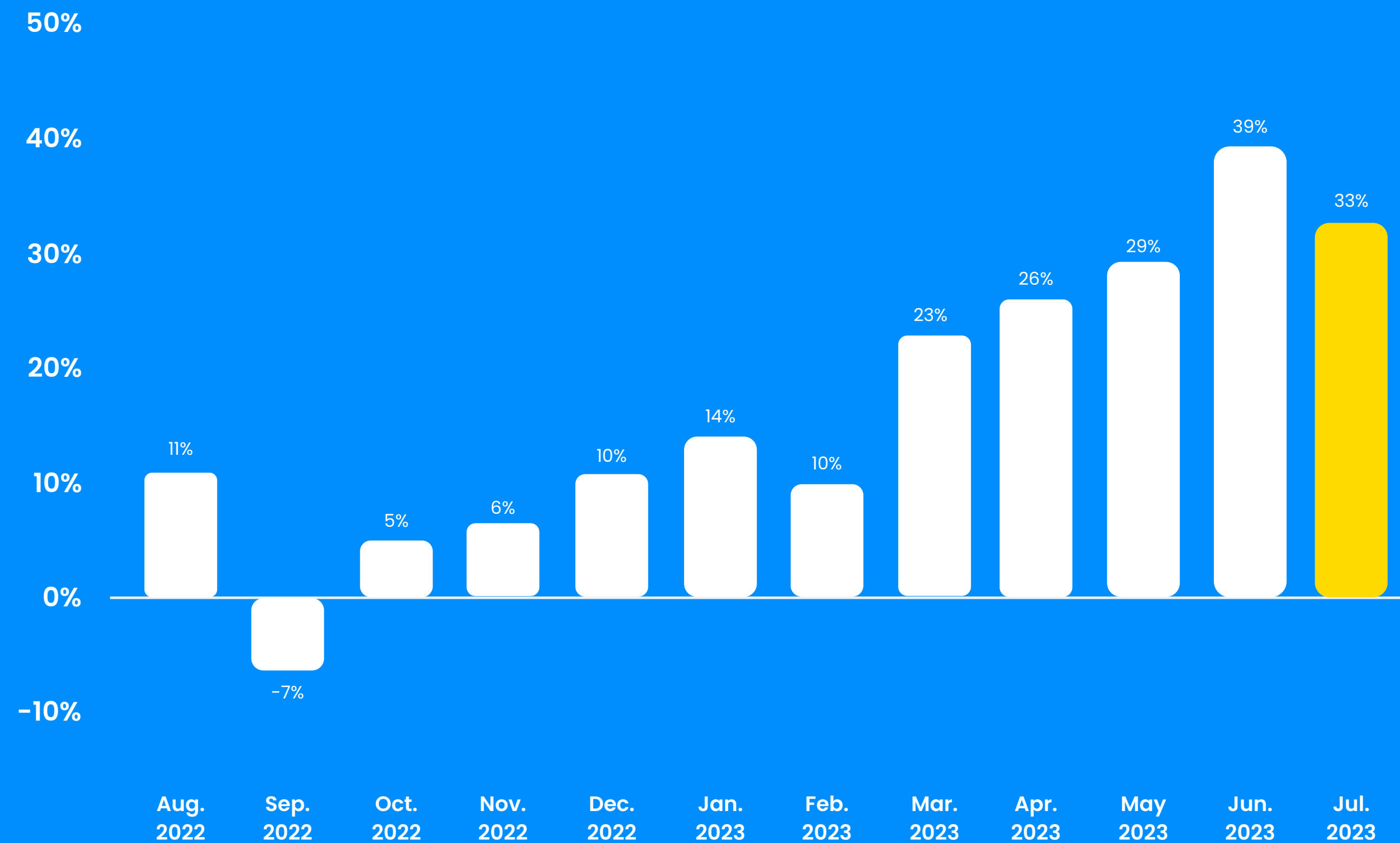
Content publisher share of variable commission



In July 2023, share of commission for content partners is 49%, down 1% YoY.

Publisher partner application growth YoY

13

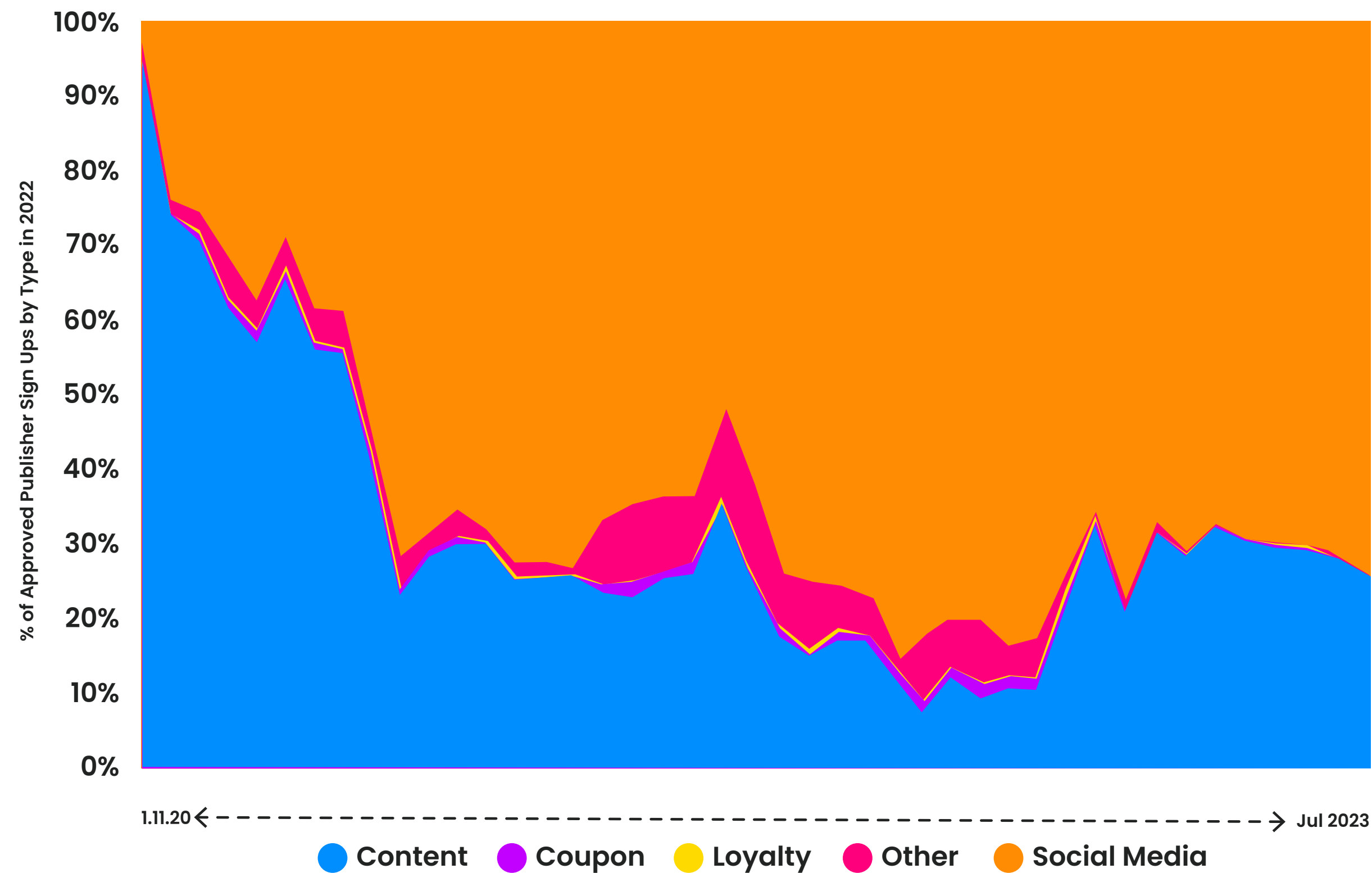


33%

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

% of approved publisher sign ups by type

14

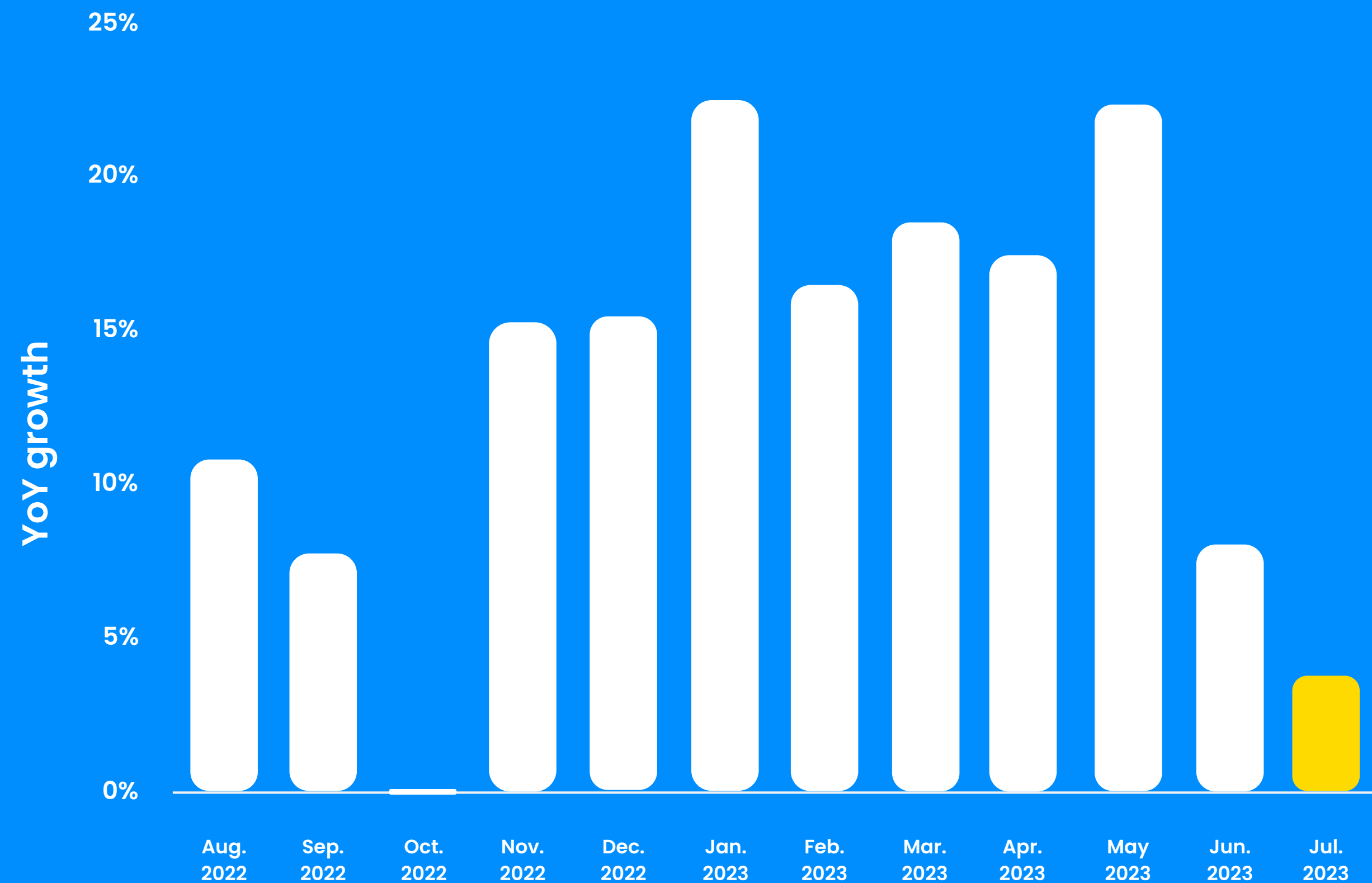


Social Media and Content partners make up the majority of new publishers joining the Ascend™ network.

The trends have remained pretty consistent throughout 2023.

Average revenue generating connections per advertiser

15

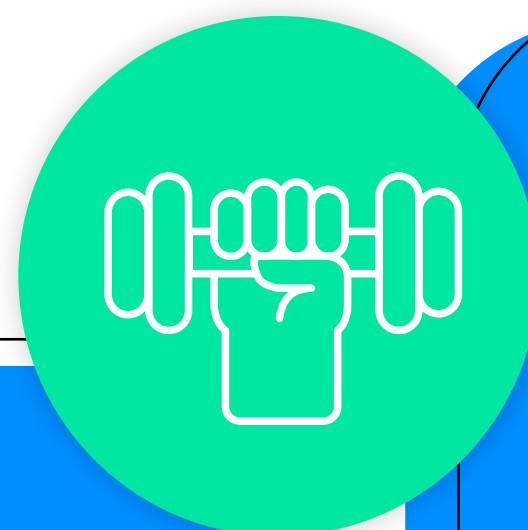


1.9%

In the month of July, we saw a 2% increase YoY in the average number of connections per advertiser.

Insights by vertical.

16

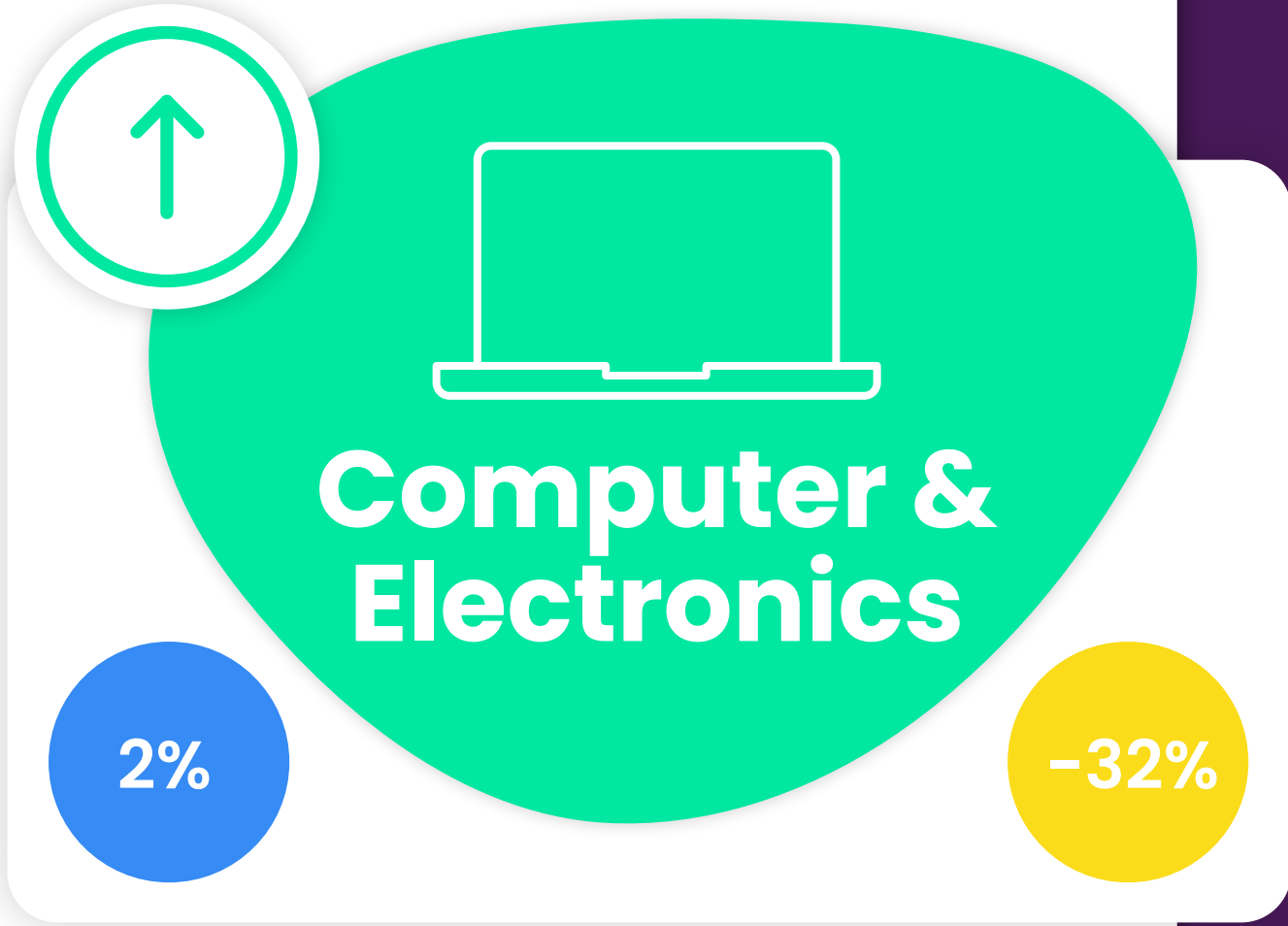
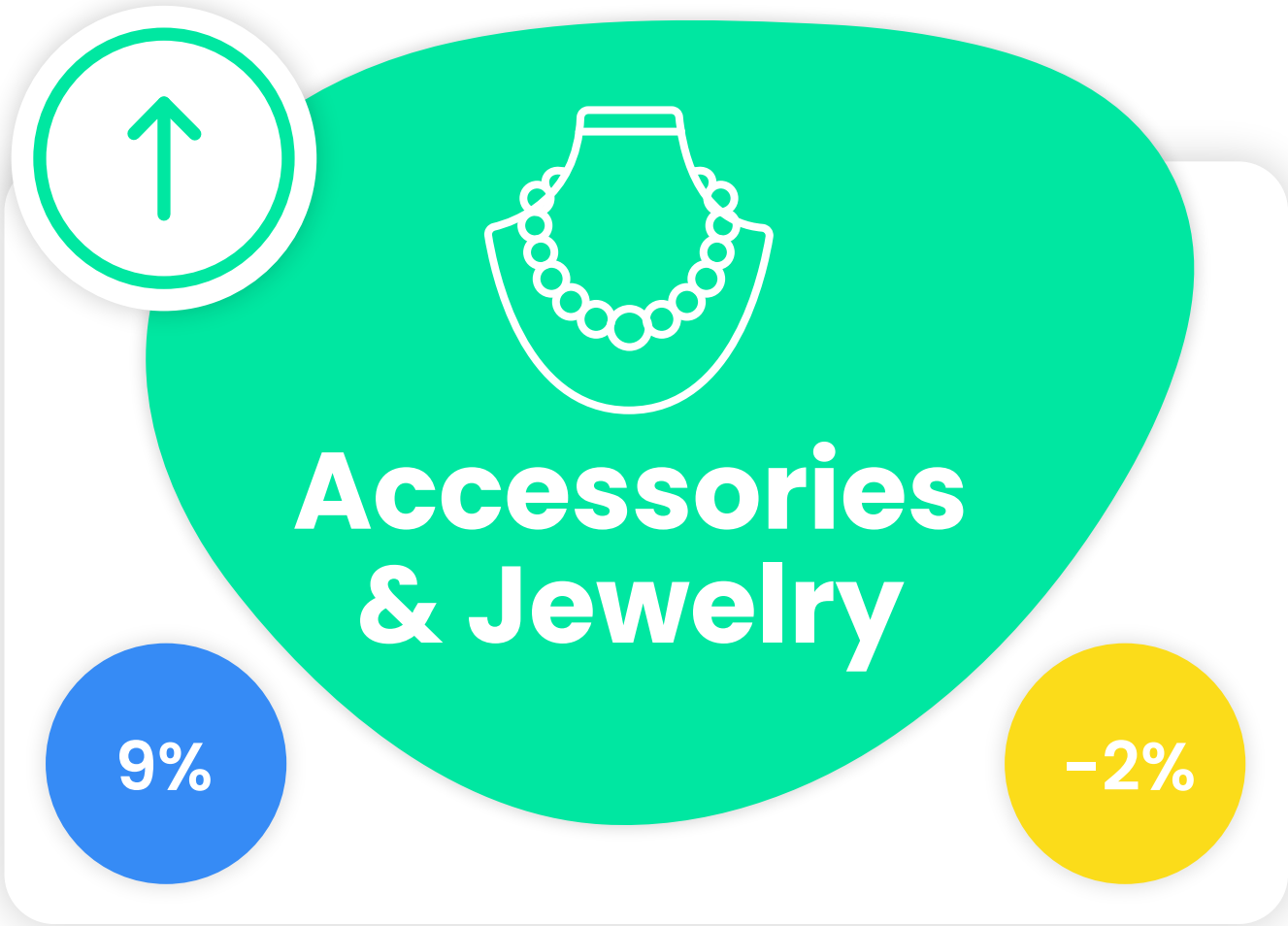


Click and revenue YoY growth rate by vertical

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

Revenue Growth YoY

Revenue share YoY

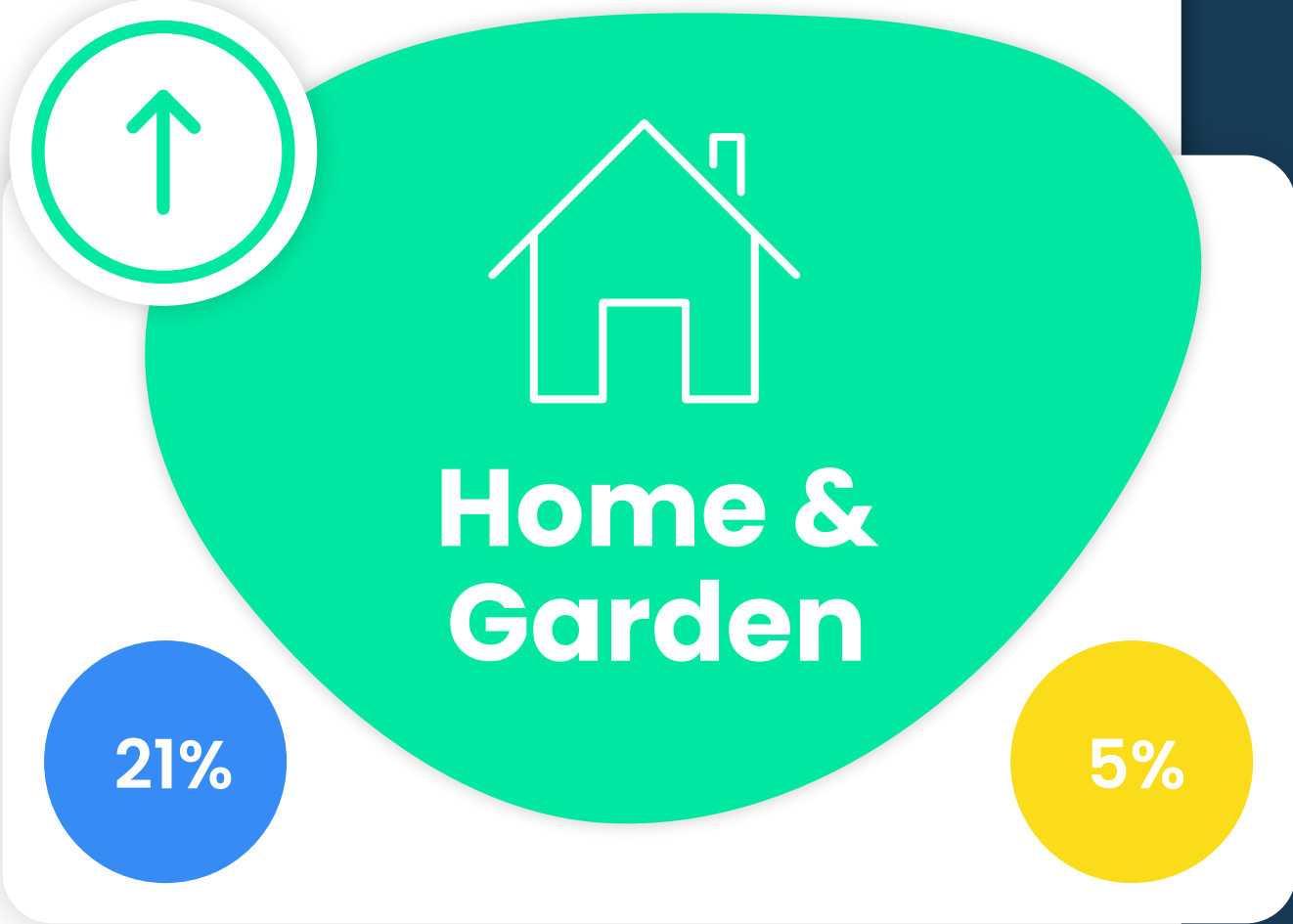
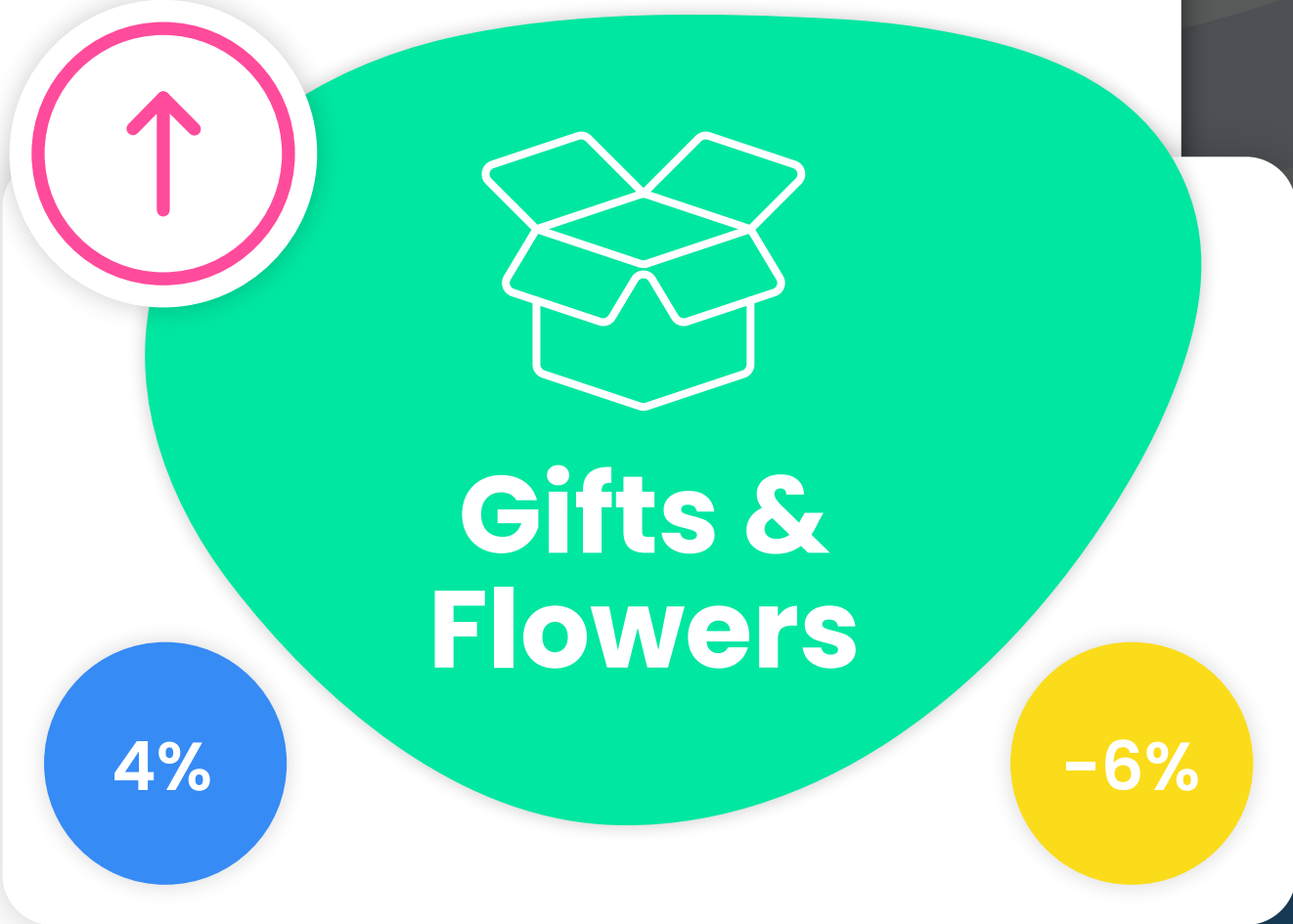


Click and revenue YoY growth rate by vertical

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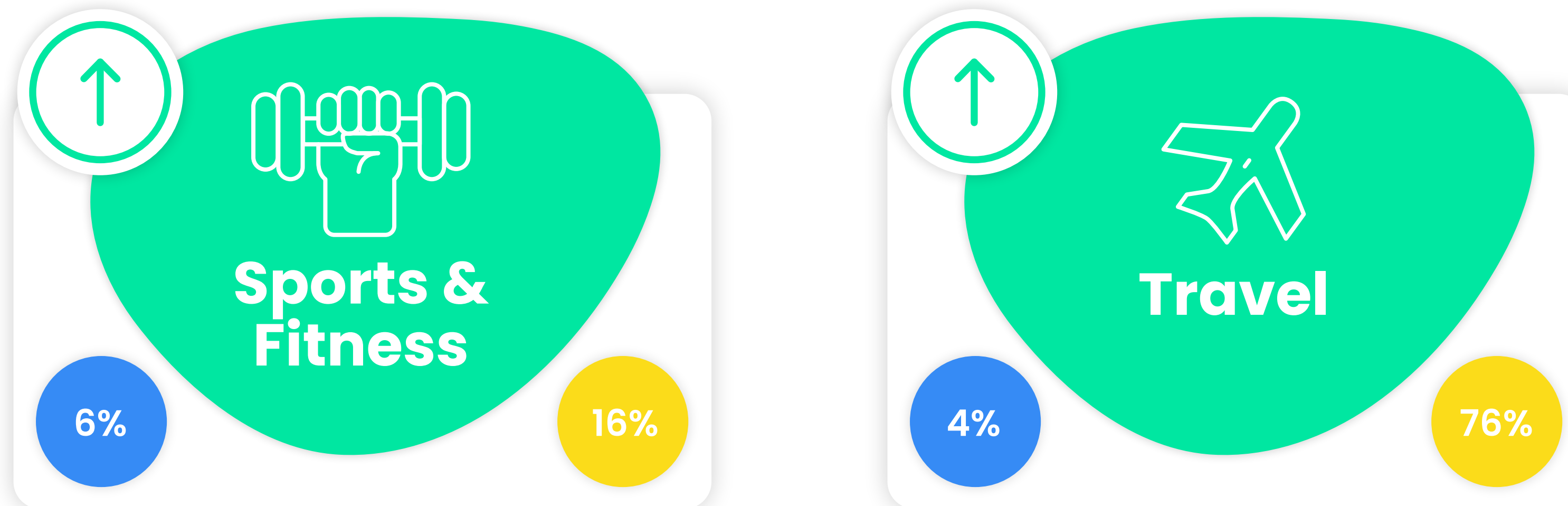
Revenue Growth YoY

Revenue share YoY



Click and revenue YoY growth rate by vertical

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



● Revenue share YoY ● Revenue Growth YoY



A better way to partner.

Interested in learning more
with a Partnerize expert?

Contact us at

contact@partnerize.com