



Partnerize

U.S. Retail Affiliate Marketing Sales Index

Updated through June 30th , 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 June 2023

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Surging

Accessories &
Jewelry



+142% YoY

Travel



+148% YoY

Sports & Fitness



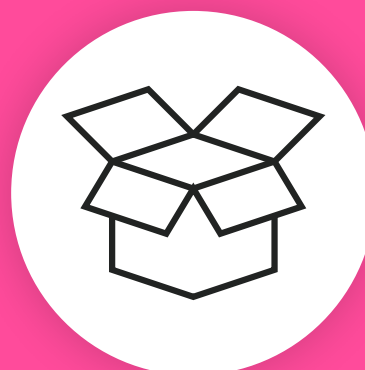
+49% YoY

Food & Drink



-132% YoY

Gifts & Flowers



-43% YoY

Health & Beauty



-120% YoY

Clothing
& Apparel



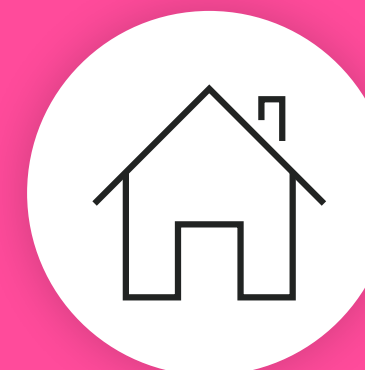
-64% YoY

Computers
& Electronics



-140% YoY

Home & Garden



-3% YoY

Art, Photo
& Music



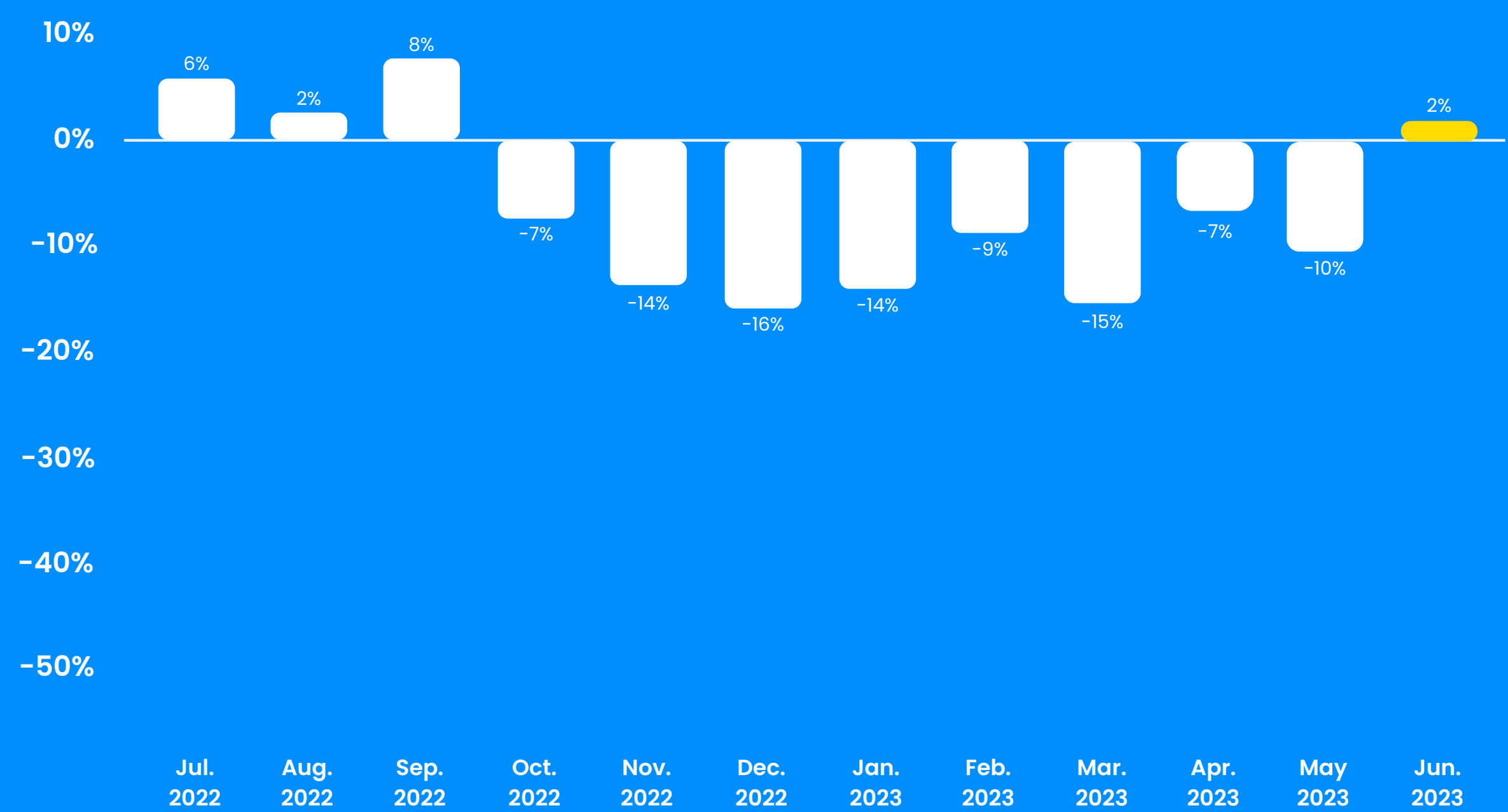
-174% YoY

Decreasing

Monthly revenue trends

4

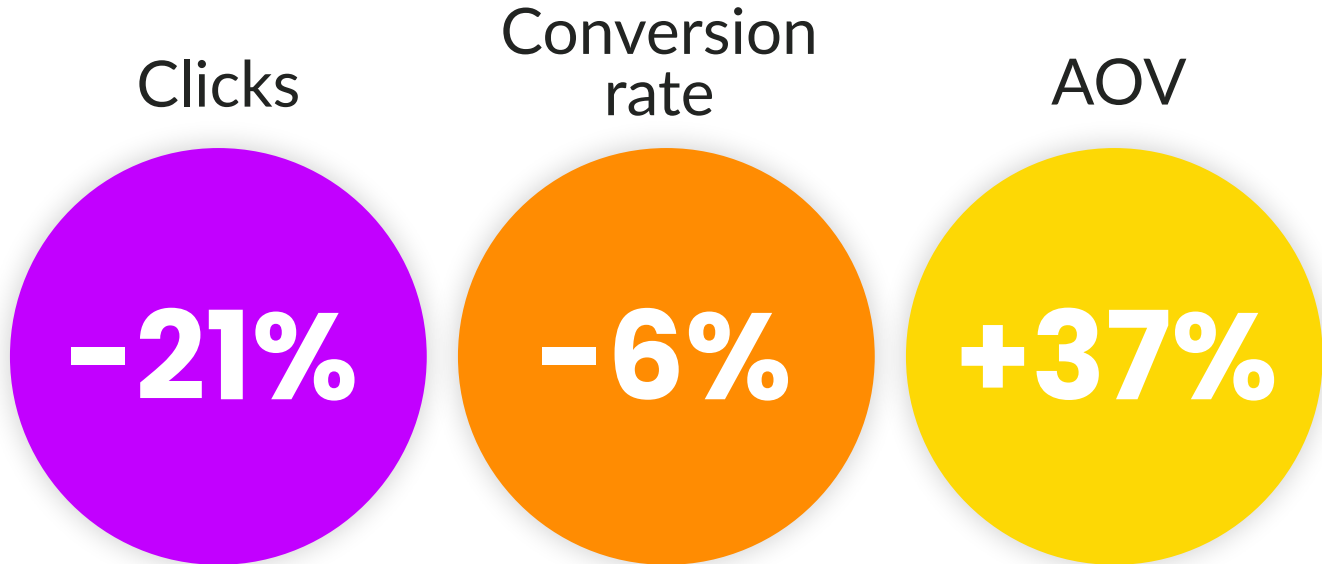
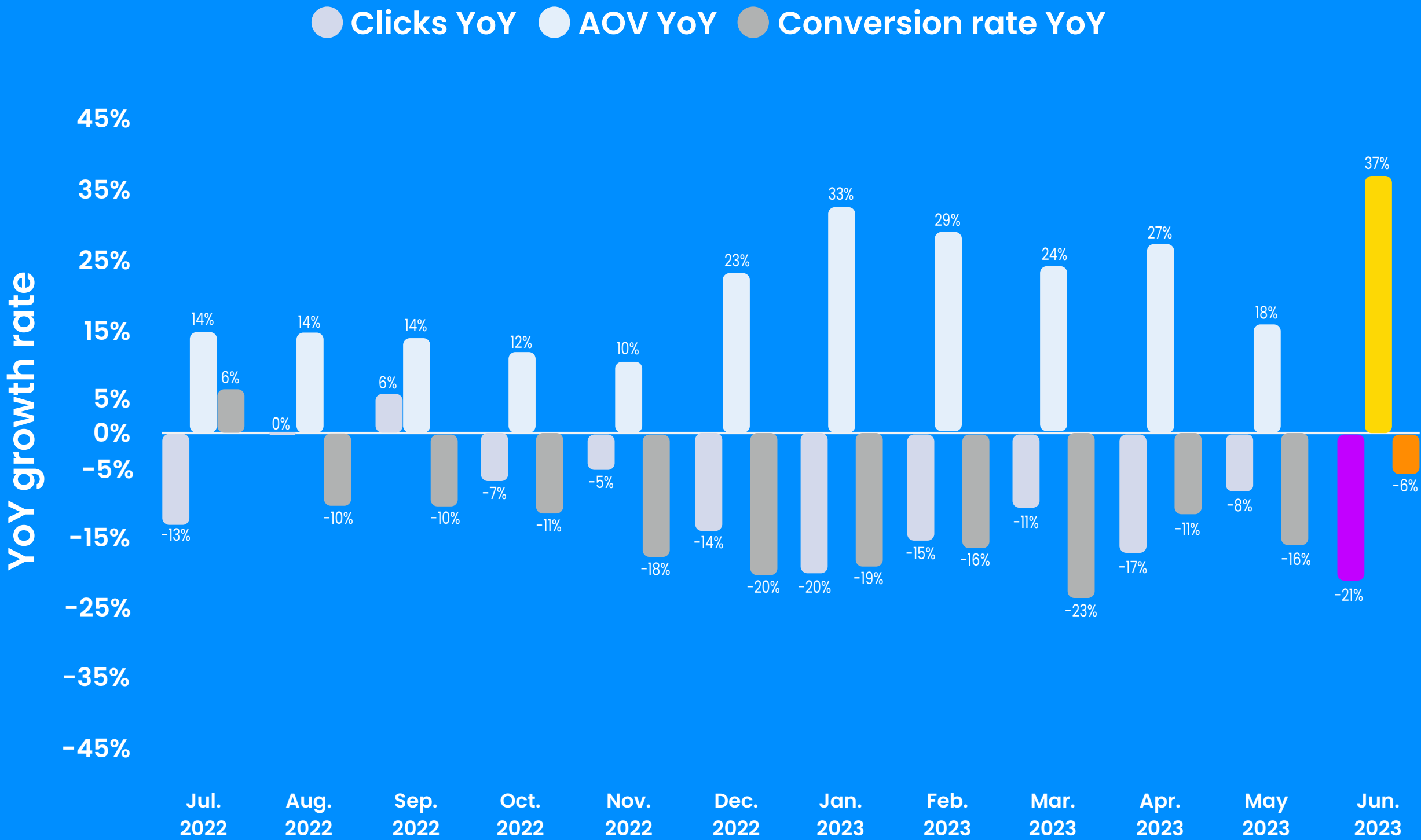
Gross Revenue YoY Growth



2%

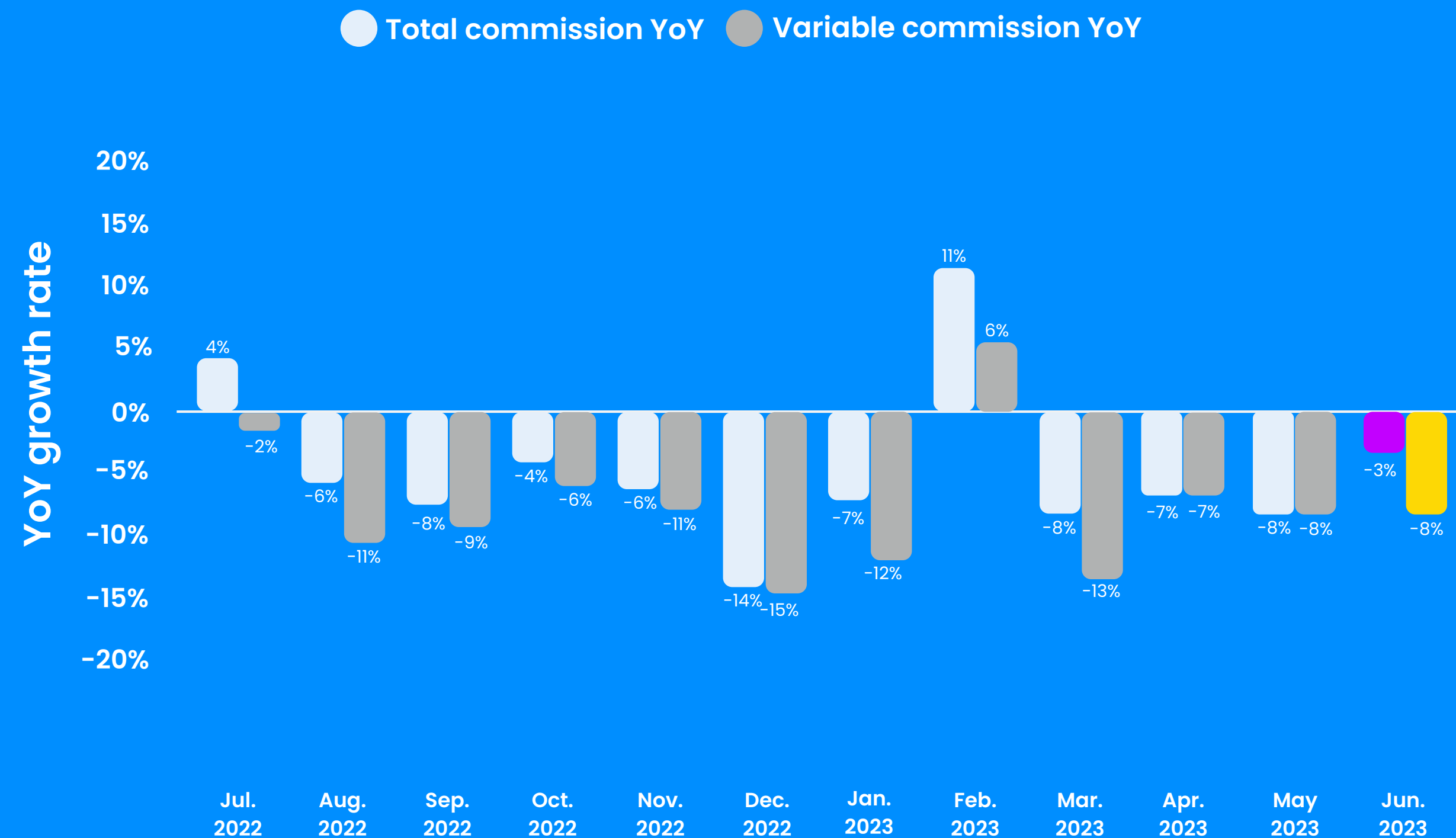
June saw a 2% YoY revenue increase.

Drivers of monthly revenue growth



While clicks were down 21% and conversion rate down 6%, average order value saw a significant YoY increase of 37%. This contributed to the 2% YoY revenue increase while suggesting that customers, on average, are spending more money per order.

Monthly commission trends



-8%

-3%

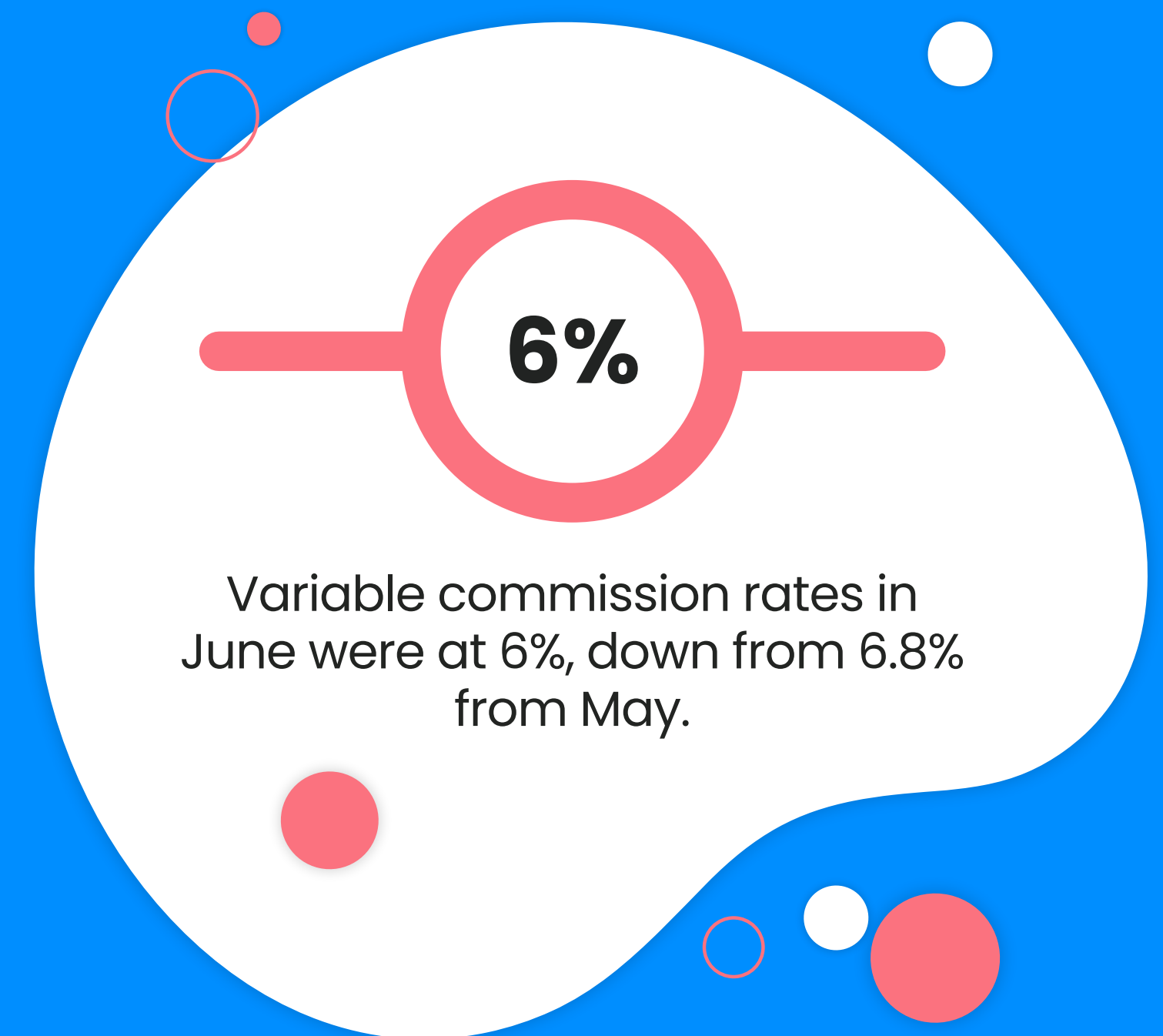
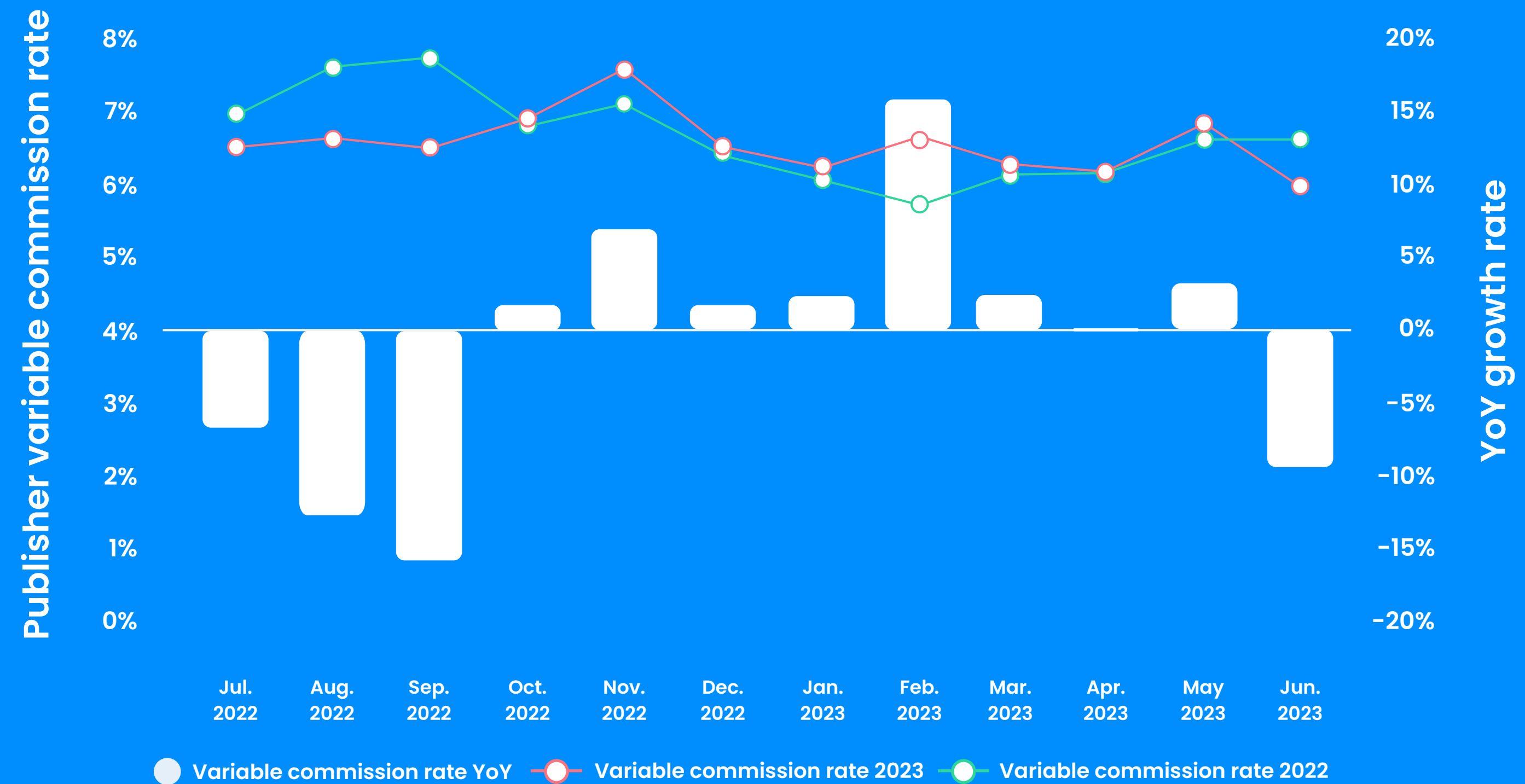
In June, variable commission rate is down 8% and total commission rate is down 3% YoY.

- 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

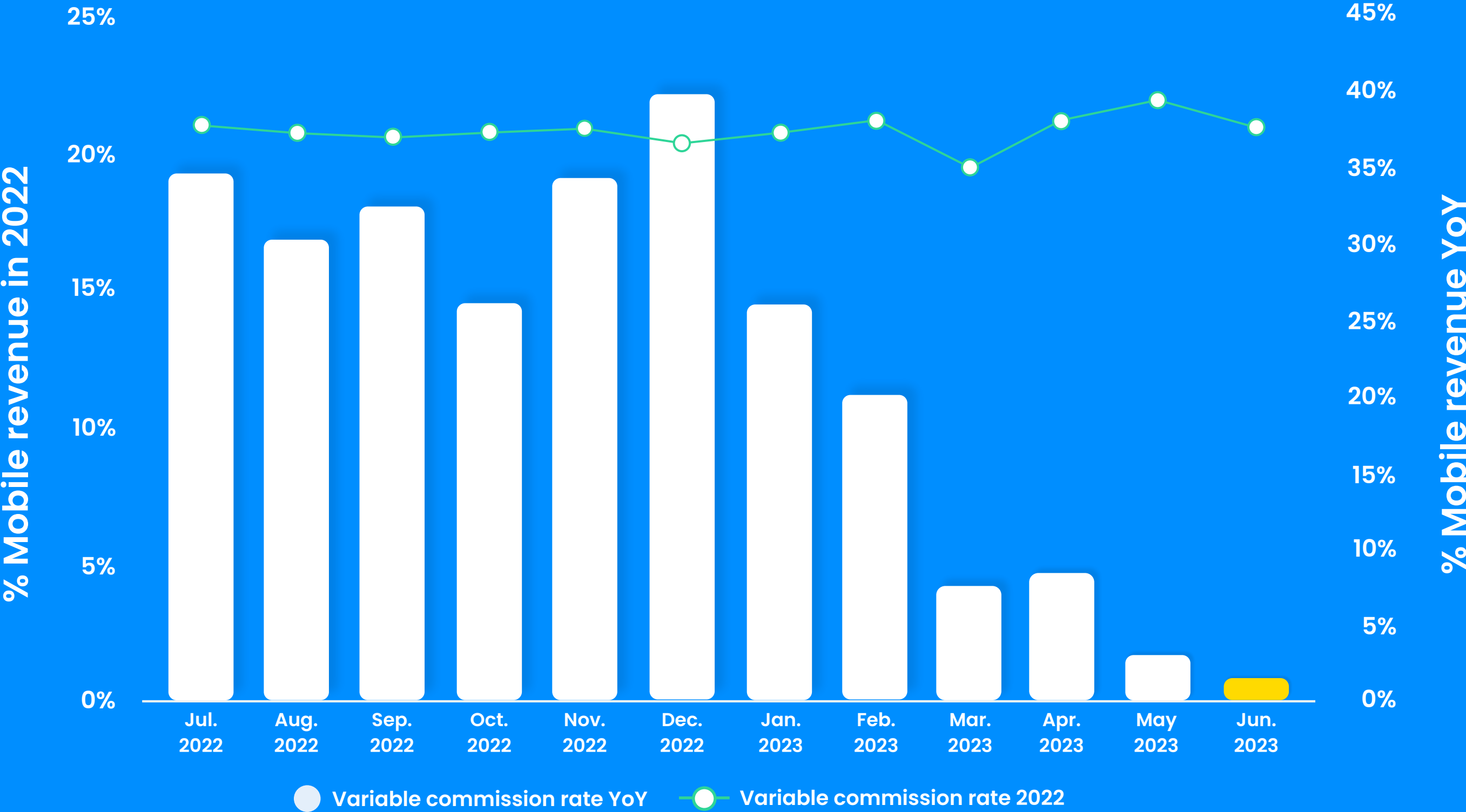
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Variable commission rate and growth YoY



Monthly mobile revenue share

% of revenue from mobile



1%

Mobile revenue YoY growth was down to 1% in June 2023, down from 4% May 2023. Mobile revenue share represented 38% of all conversion activity.

Revenue growth by advertiser vertical



Monthly new customer revenue share

10

% of revenue from new customers



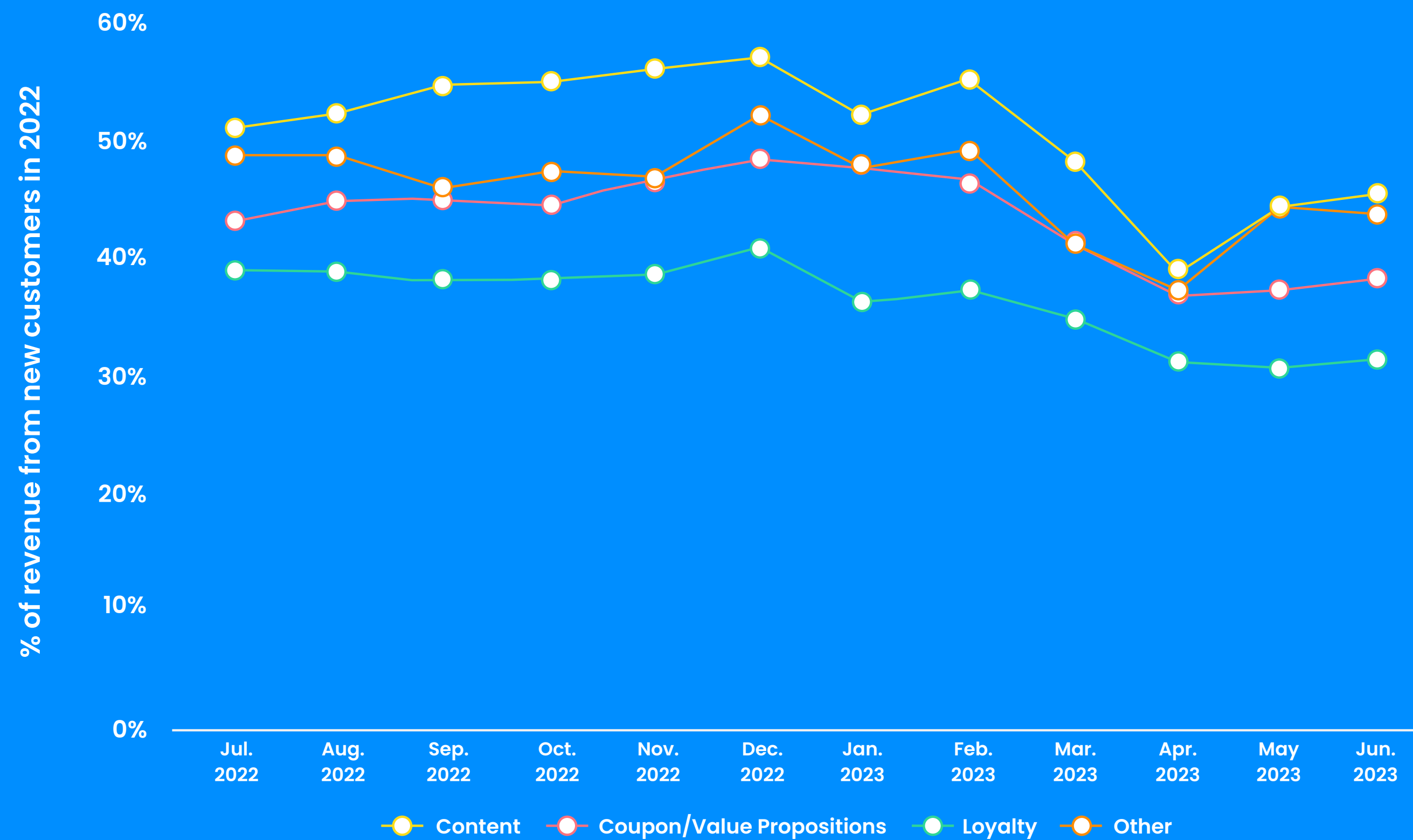
2%

In June, the percentage of revenue acquired from new customers is now at 40%, up from 39% in May. We also see new customer revenue is down 2% YoY.

New customer revenue by publisher category

11

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



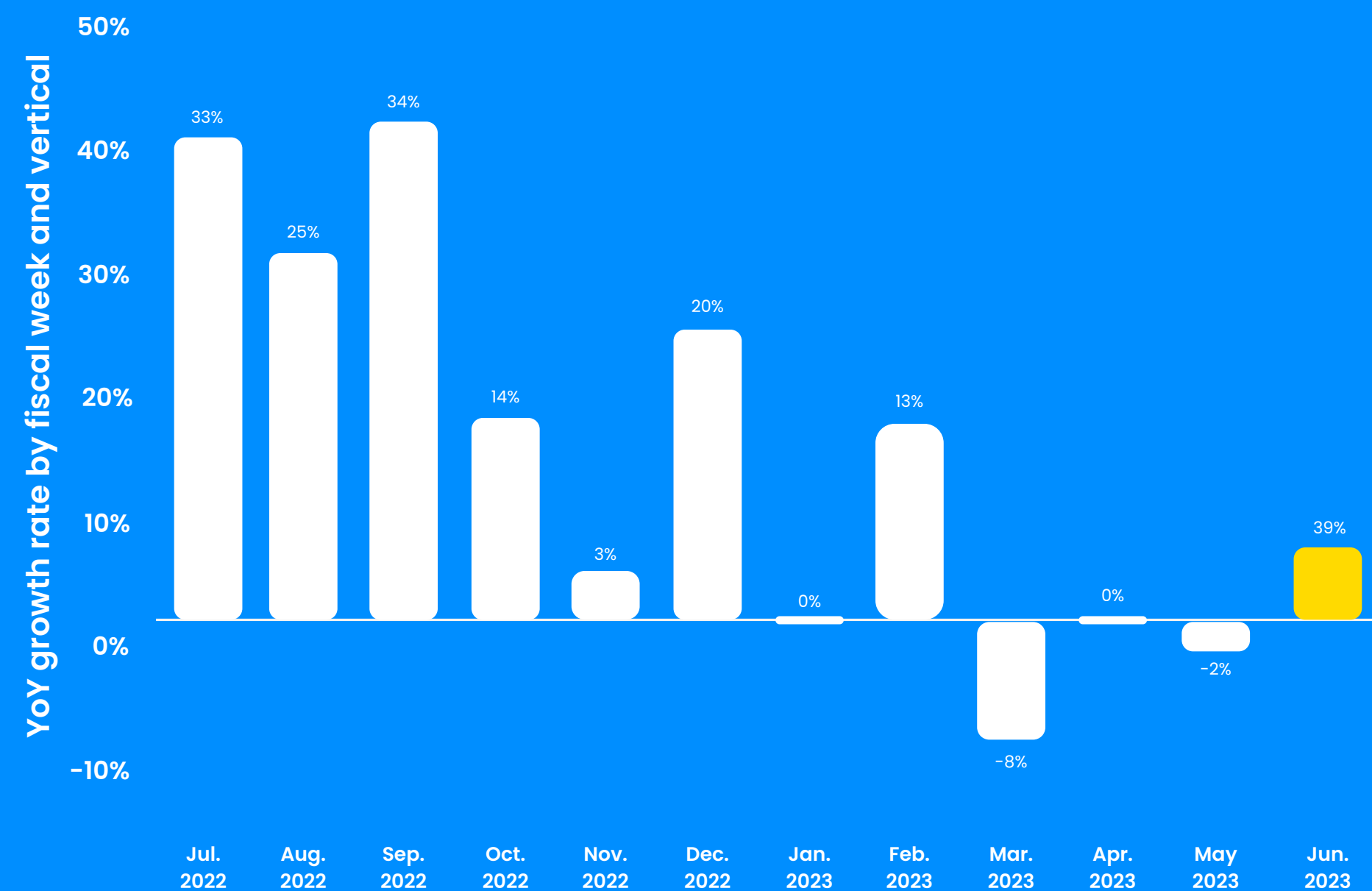
46%

Content partners have a new customer rate of 46% followed by other partners at 44%, coupon at 39%, and Loyalty at 32%.

Content publisher YoY revenue and commission trends

12

Content publisher revenue YoY growth rate



In June, YOY revenue growth rate for content partners is up 5%.

Content publisher share of variable commission

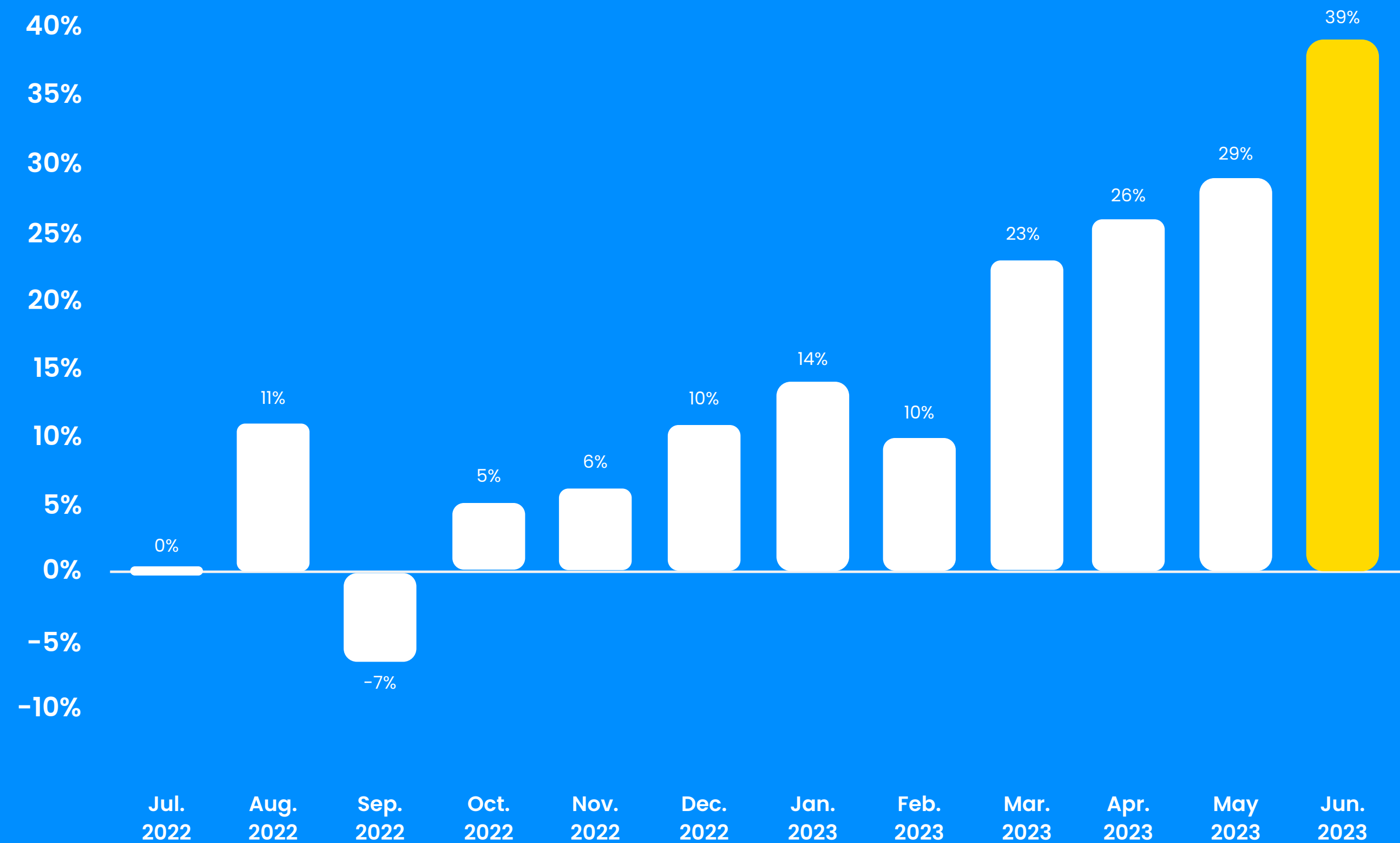


Content partner share of variable commission is at 48% in June down from 52% in May.

Coupon partner share of variable commission increased 26%, loyalty increased 18% and other increased 7%.

Publisher partner application growth YoY

13

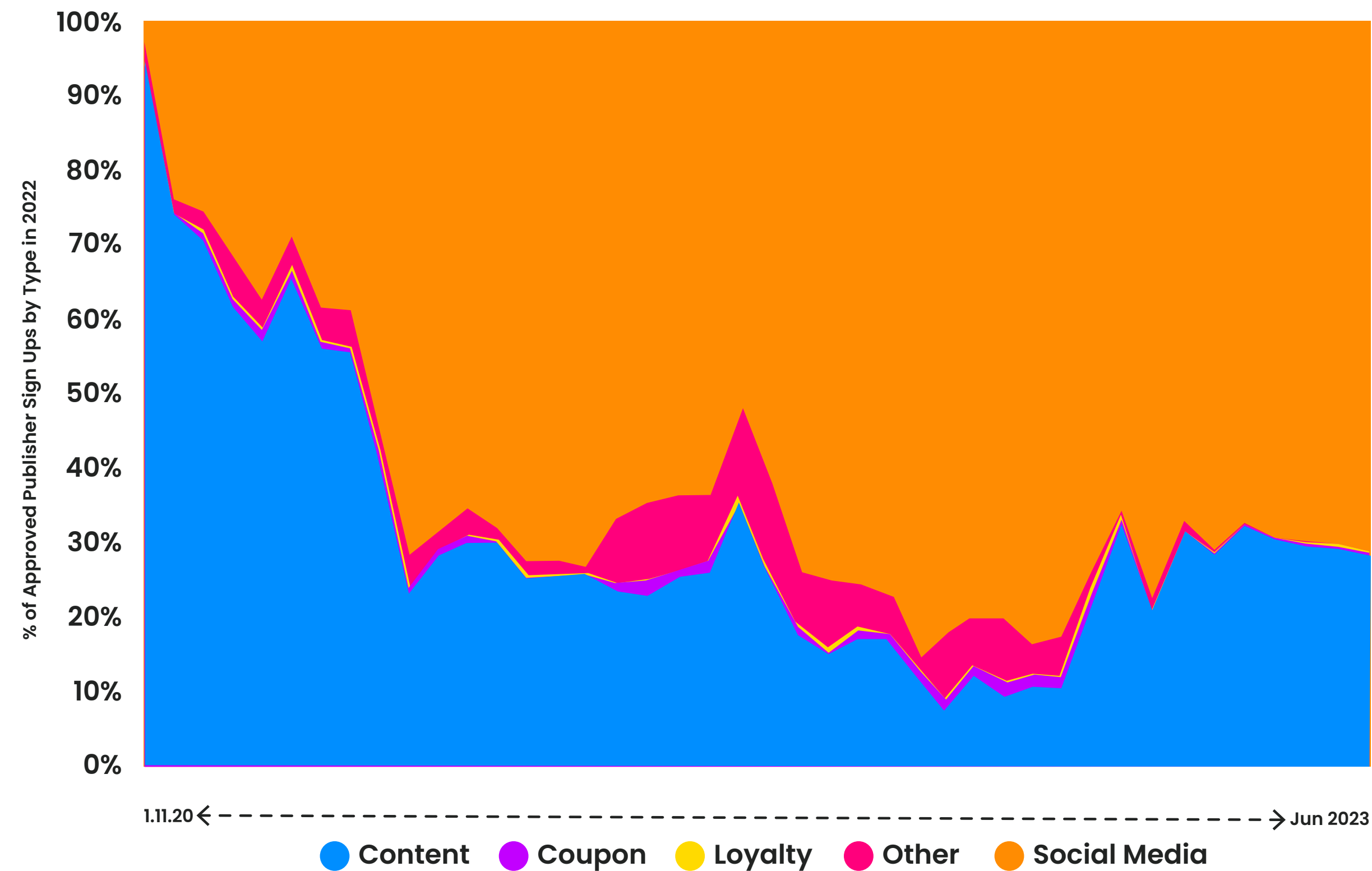


39%

Partner applications increased 39% YoY in June demonstrating 9 consecutive months of YoY increases.

% of approved publisher sign ups by type

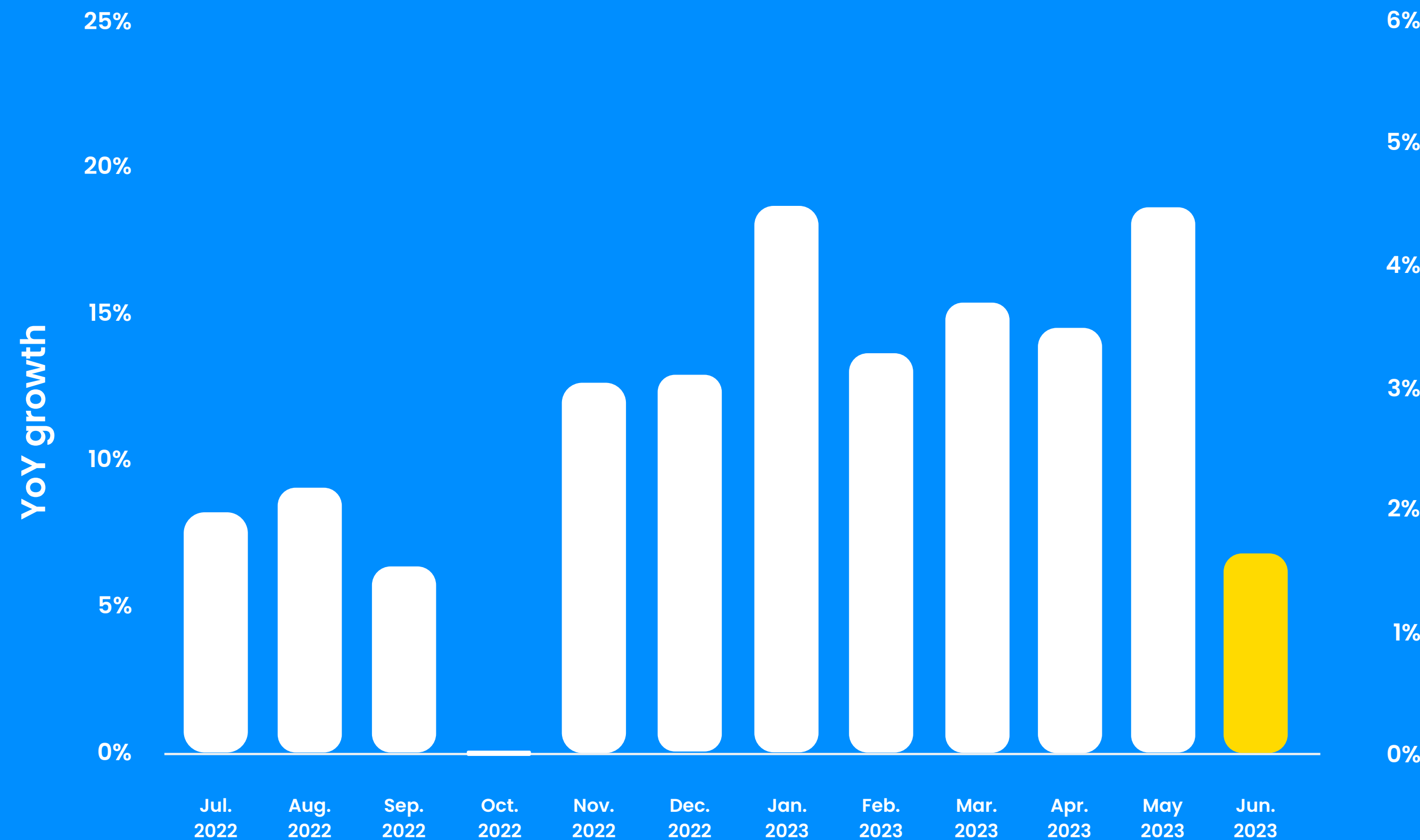
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In 2022, publisher applications were largely from content partners. However, in 2023, we have observed an increase in publishers classified as 'Social media', suggesting that more influencers are turning to affiliate marketing to monetize their content and leverage the channel as a revenue stream.

Average revenue generating connections per advertiser

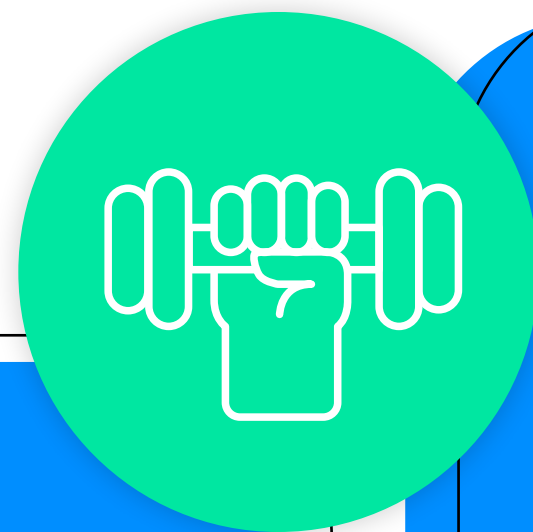
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1.9%

As partner applications continue to grow, so do the number of revenue generating connections between advertisers and partners. In June, we saw a 1.9% increase YoY in the average number of connections per advertiser. This suggests a mutual interest from both advertisers and publishers to speed activation and time to revenue within the affiliate channel.

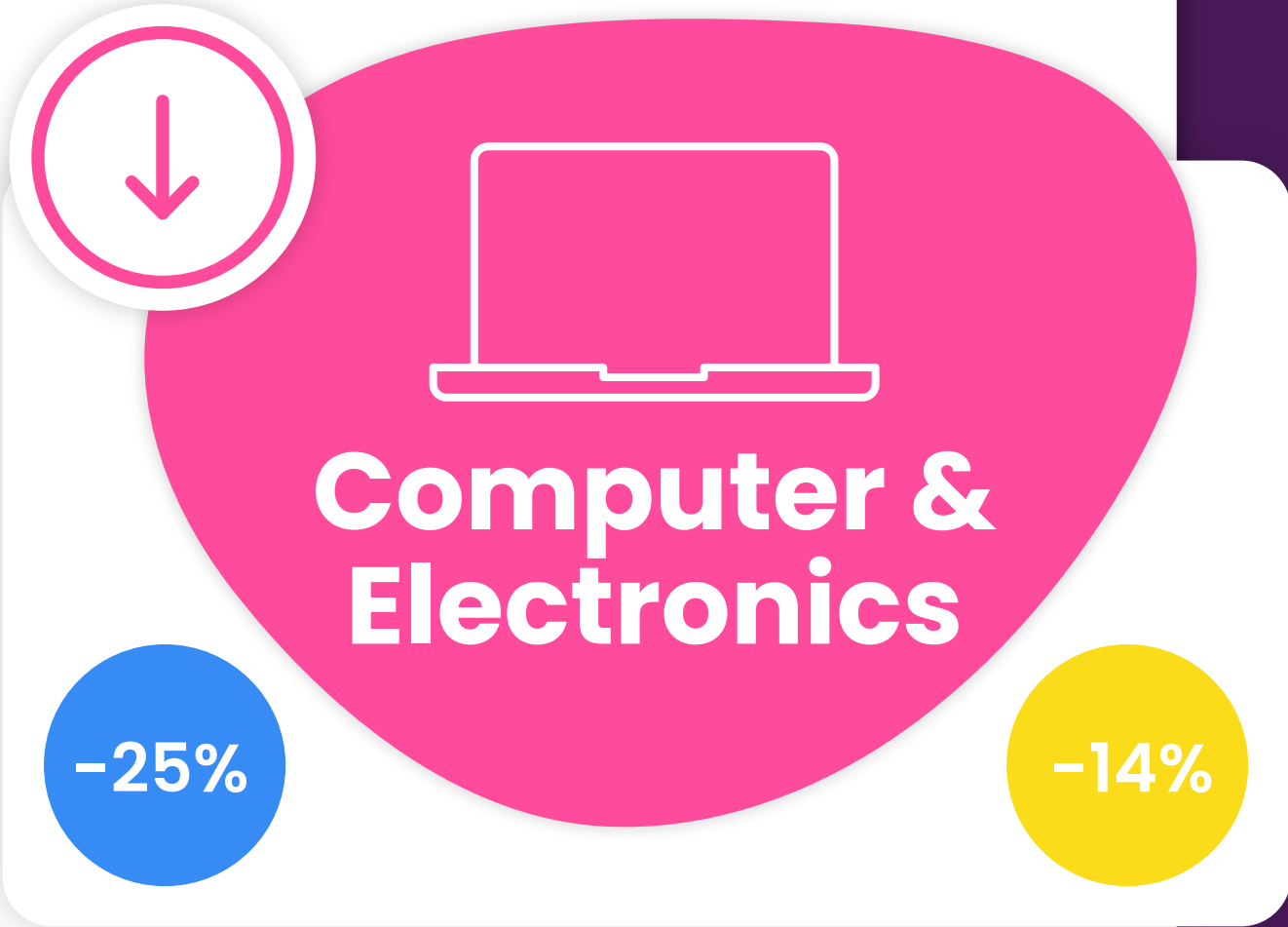
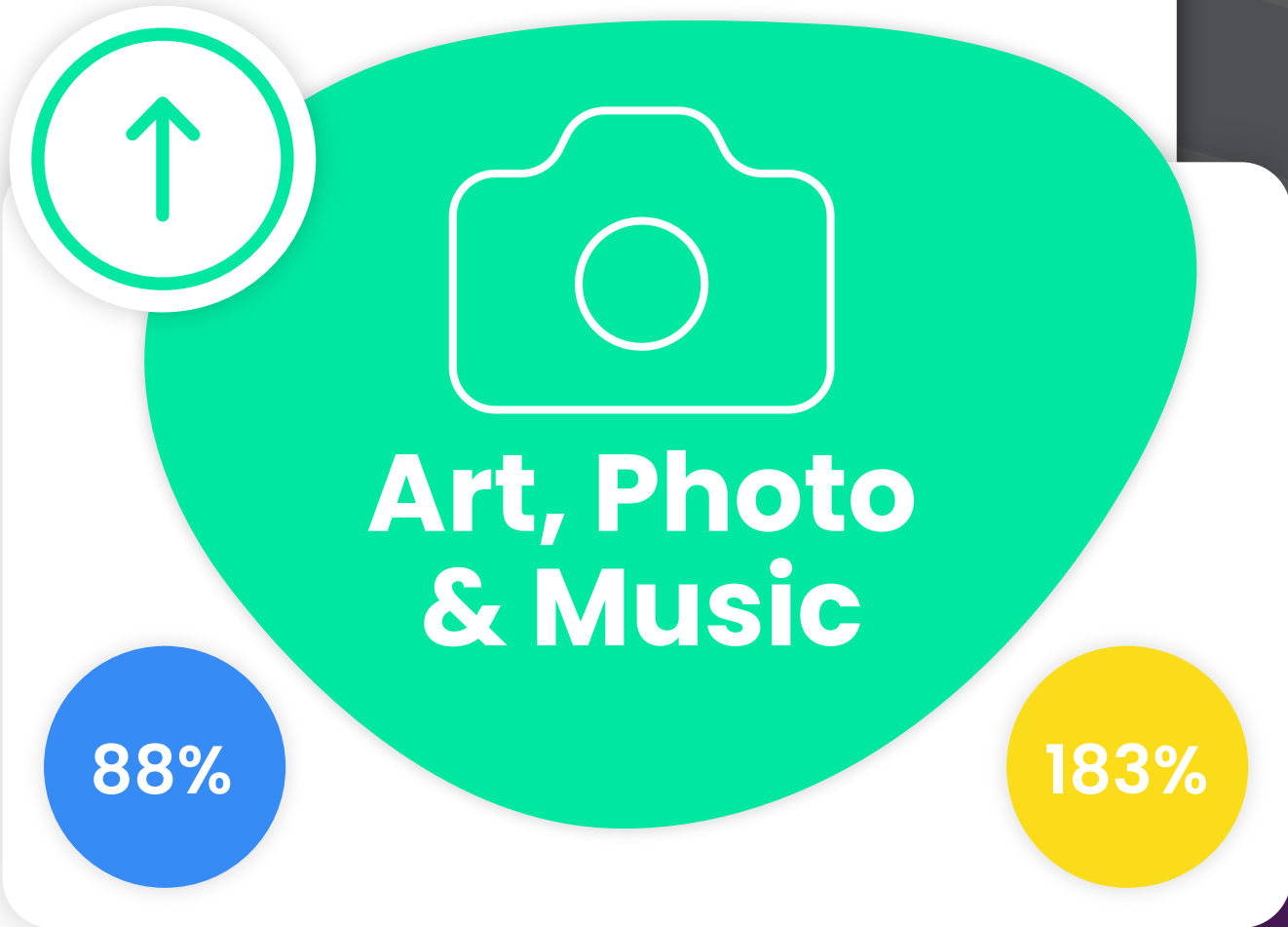
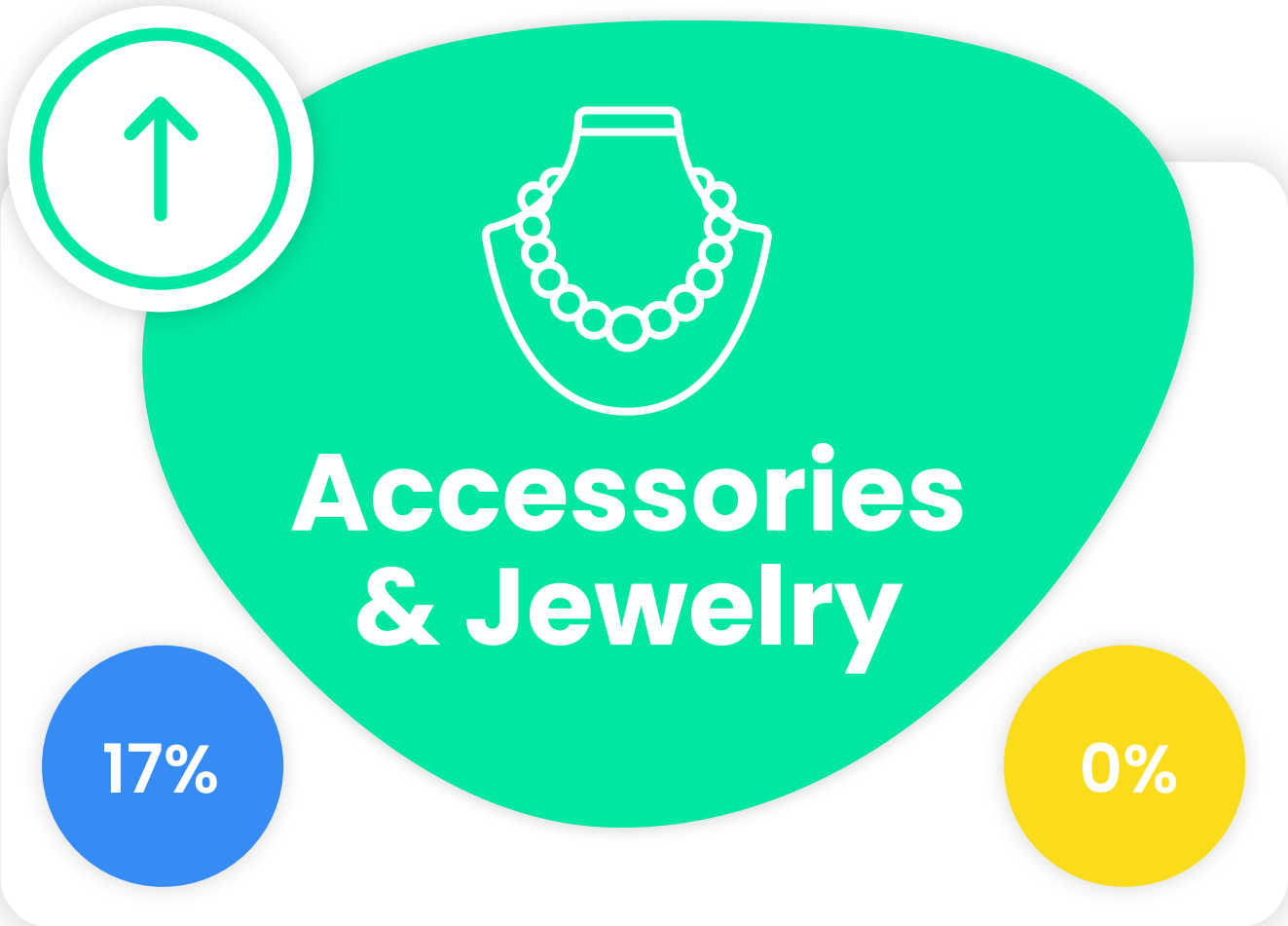
Insights by vertical.



Click and revenue YoY growth rate by vertical

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

● Gross revenue YoY ● Clicks YoY

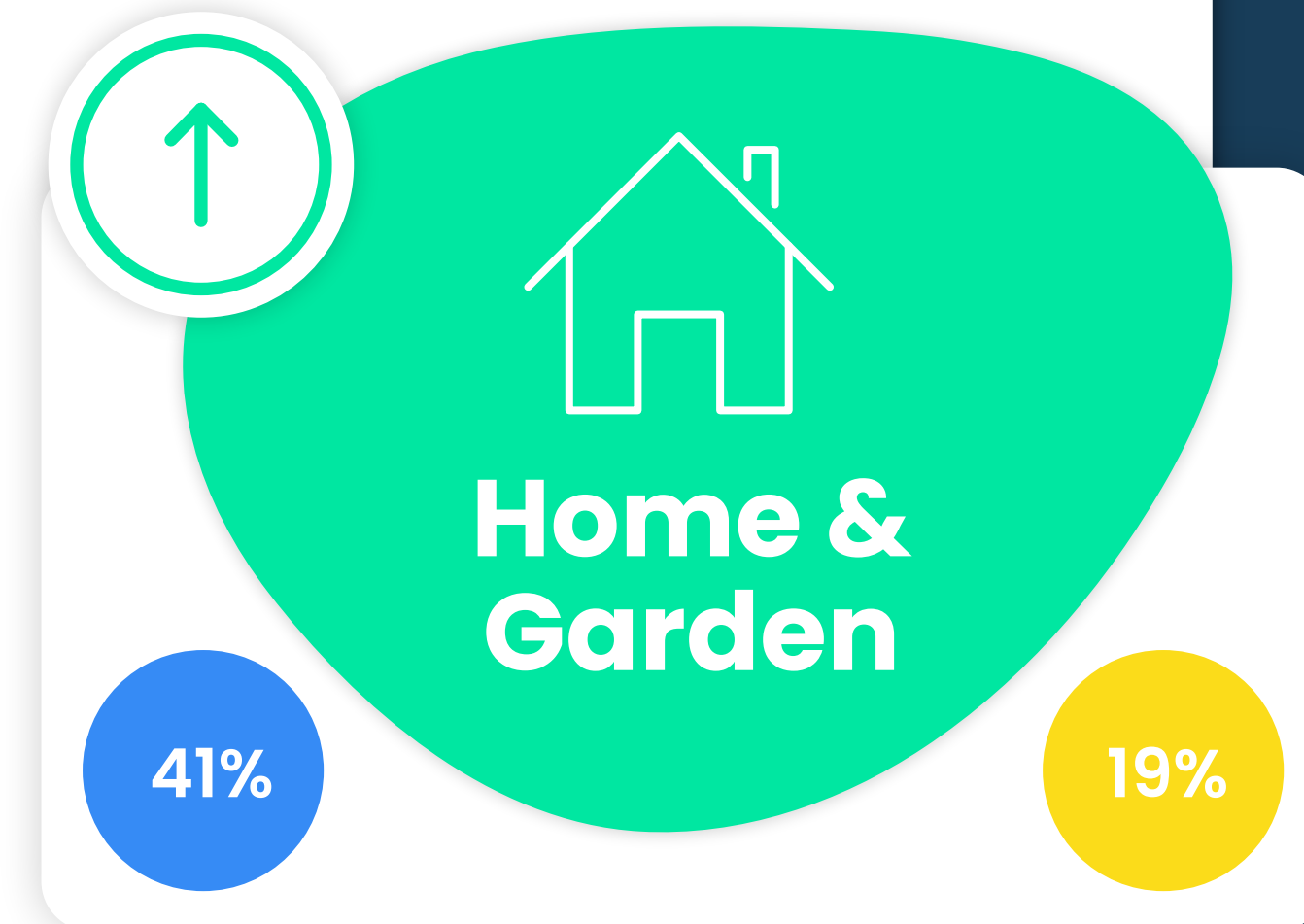
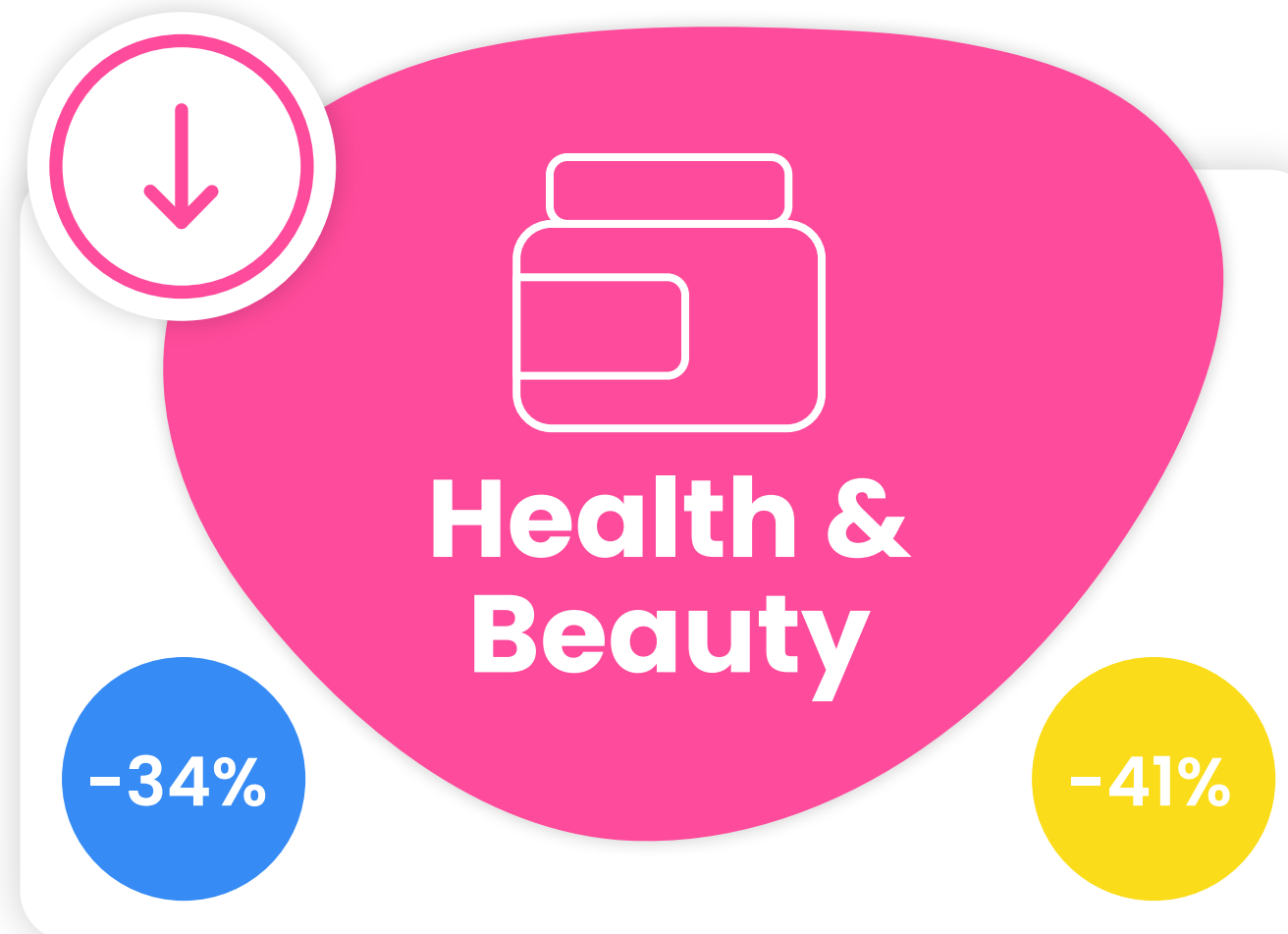
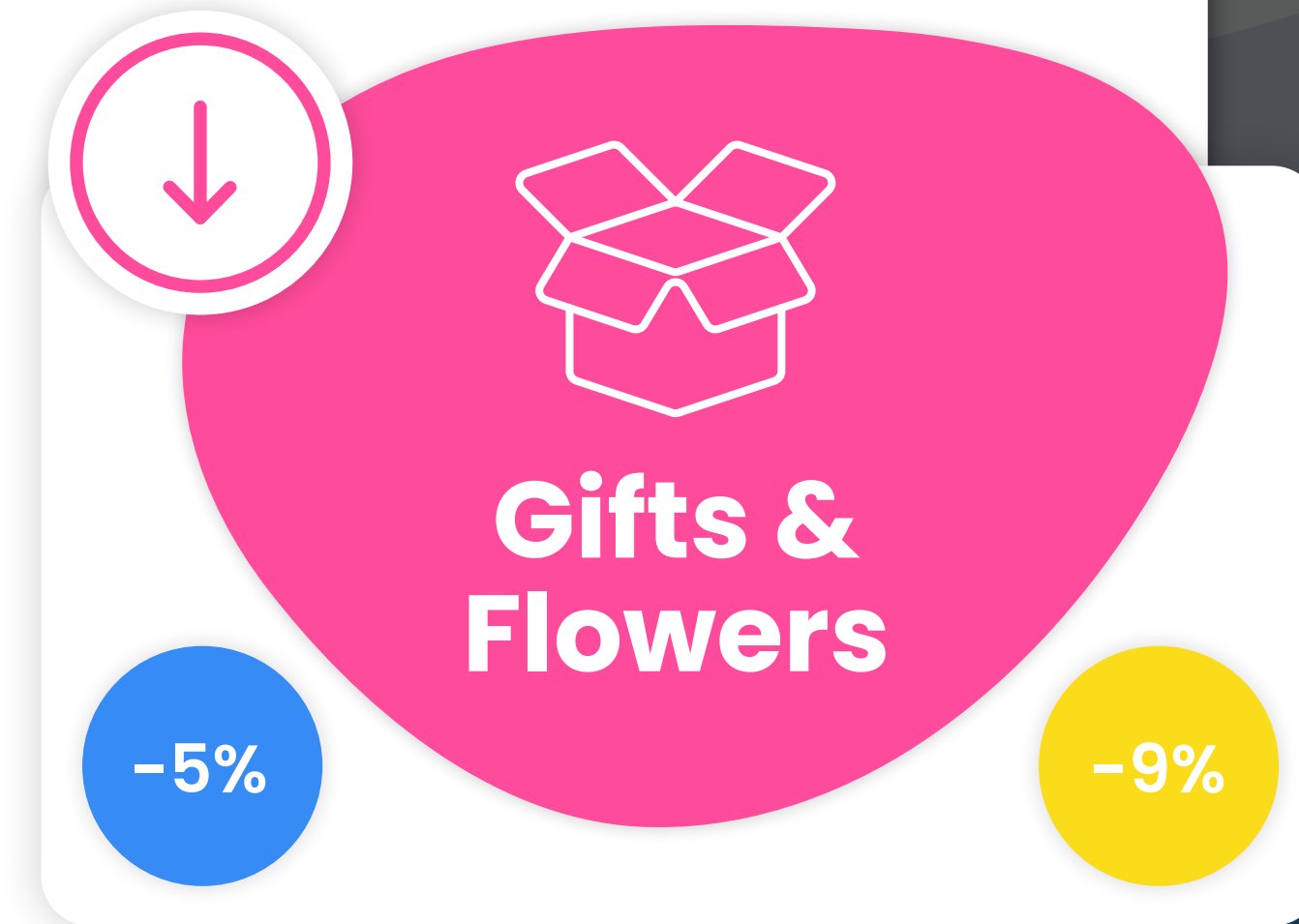


Click and revenue YoY growth rate by vertical

18

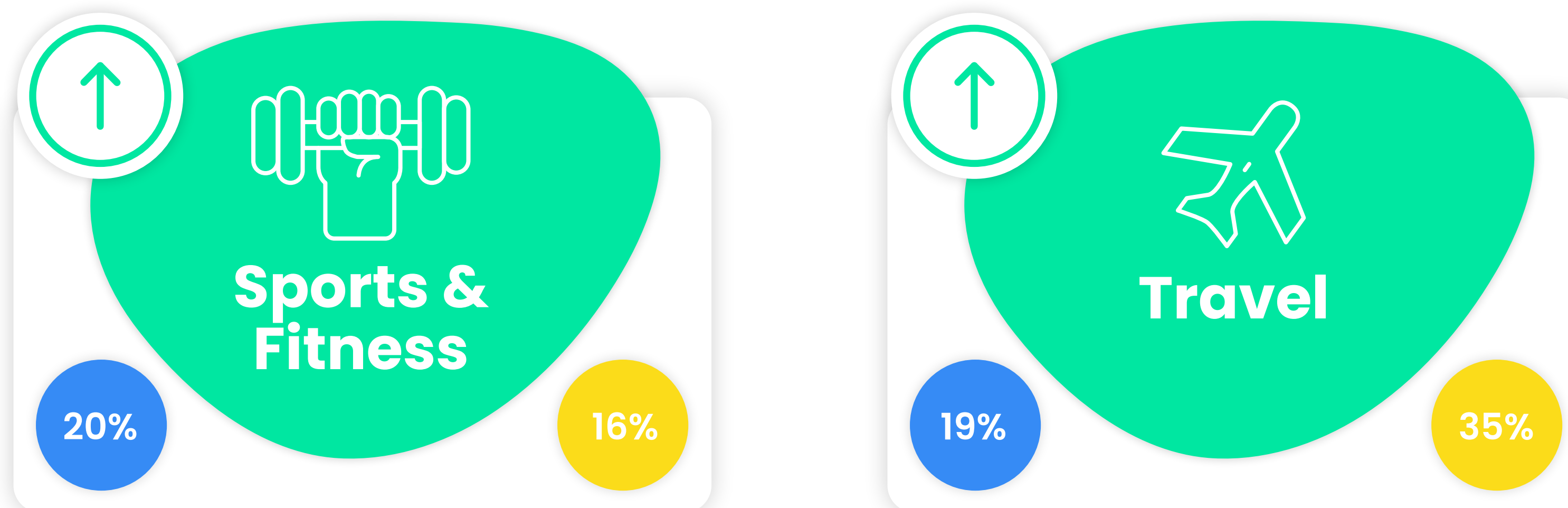
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Click and revenue YoY growth rate by vertical

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A better way to partner.

Interested in learning more
with a Partnerize expert?

Contact us at

contact@partnerize.com