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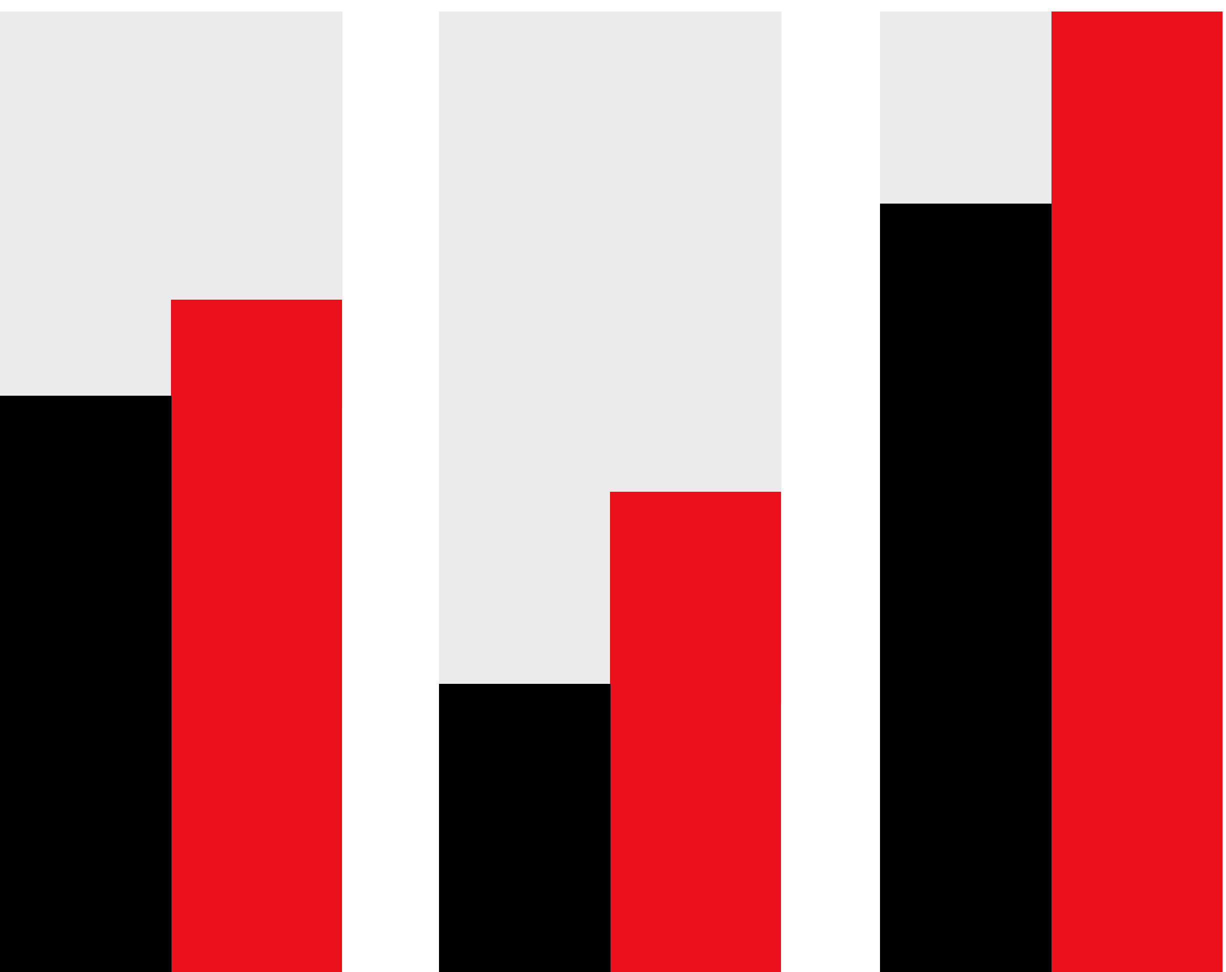
SEP 2022
Max Willens

Affiliate Marketing

As Ecommerce Swells, Affiliate Inches Closer to Digital Mainstream

Affiliate marketing is making a strong case for the role it can play in marketers' broader digital plans, as influencer marketing, retail media, and social ad spending continue to gain steam. Unfortunately, 28% of US marketing executives do not know the effect affiliate marketing is having on their revenues. This is a critical mistake. This eMarketer report reveals the trends, projections, and analysis on how the space is changing.



Presented by

Partnerize

Dear eMarketer Reader,

eMarketer is pleased to make this report, **"Affiliate Marketing: As Ecommerce Swells, Affiliate Inches Closer to Digital Mainstream,"** available to our readers.

This eMarketer report reveals the trends, projections, and analyses on how affiliate marketing is changing, as well as which strategies marketers should implement.

We invite you to learn more about **eMarketer's approach to research** and why we are considered the industry standard by the world's leading brands, media companies, and agencies.

We thank you for your interest in our report, and we thank **Partnerize** for making it possible to offer this report to you today.

Best regards,

Nancy Taffera-Santos

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Affiliate Marketing 2022: As Ecommerce Swells, Affiliate Inches Closer to Digital Mainstream

The pandemic helped power affiliate marketing's growth, and the looming economic challenges figure to give it another jolt. The affiliate channel has historically thrived in periods of economic uncertainty. But it is not yet a critical channel in the digital ad landscape.

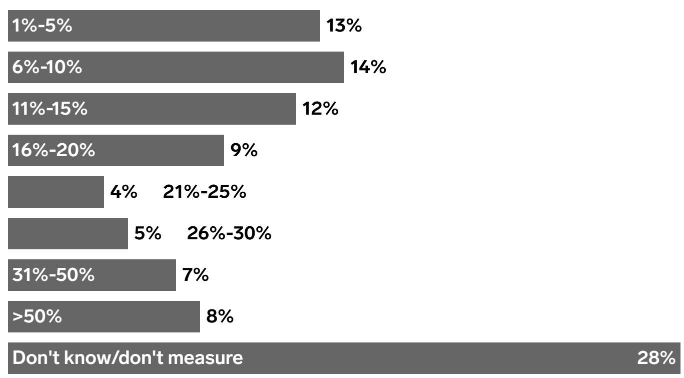
3 KEY QUESTIONS THIS REPORT WILL ANSWER

1. How much are US marketers spending in the affiliate marketing ecosystem?
2. How are new players, such as influencers and buy now, pay later (BNPL) providers, reshaping the space?
3. What strategies should marketers employ as the ecosystem continues to evolve?

WHAT'S IN THIS REPORT? An overview of the affiliate marketing space, including comparisons with related digital advertising channels; analyses and insights from practitioners on how the space is changing.

Share of Company Revenues Driven by Partnerships According to US Marketing Executives, Oct 2021

% of respondents



Source: Impact.com, "The State of Partnership Marketing," Jan 13, 2022

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KEY STAT: More than a quarter (28%) of US marketing executives said they do not know or do not measure partnership marketing's effect on company revenues, despite it being a channel dominated by performance metrics.

Contents

Affiliate Marketing 2022

Affiliate Marketing Inches Closer to Digital Media Buying Mainstream

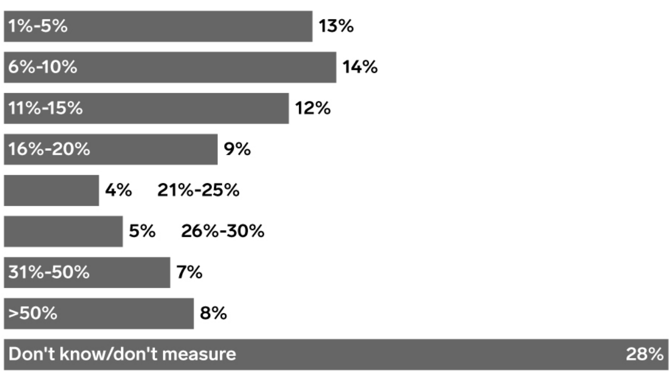
Affiliate marketing stands on the precipice of major change in perception. Many affiliate marketing players have posted record growth throughout the pandemic. Economic uncertainty could give a big boost to others, as consumers grow price-conscious. But the channel must make the case for the role it can play in marketers' broader digital plans, as influencer marketing, retail media, and social ad spending continue to gain steam—and as affiliate's biggest players continue to guard data and attribution rules.

Key Stat

28% of US marketing executives do not know or do not measure affiliate marketing's effect on their revenues.

Share of Company Revenues Driven by Partnerships According to US Marketing Executives, Oct 2021

% of respondents



US Performance Marketing Ecommerce Revenue Share, by Industry, 2021

% of total

Our Findings

Shifts in consumer behavior and tech have expanded the capabilities of affiliate marketing.

- **Many D2C companies are looking to build their brands, not just move inventory.**
- **Social media seeks a bigger, more direct role.** Instagram and YouTube are testing new native platforms; TikTok operates its own affiliate program.
- **Measurement progress is a must.** Marketers can't fully integrate affiliate into their overall ad spending without better ways to measure success.

Your Opportunity

With thought and patience, affiliate marketing can solve many marketing challenges.

- **Find the right partners.** Relationships remain crucial. Finding and securing effective partnerships can take time; commit to the process.
- **Determine the best measurement strategy.** Find partners that can provide impression-level data, or measurement that fits your digital strategy.
- **Keep an eye on social media platforms.** Their ecommerce ambitions have significant implications for the affiliate marketing ecosystem.

Also in this report: Retail ecommerce forecast | Social commerce forecast | Retail media spending forecast

Key Points

- **Affiliate marketing has piqued the interest of a new generation of marketers.** After years of dealing with skepticism from decision-makers, this generation of direct-to-consumer and digitally native brands—particularly those hungry for measurable growth—is giving the channel a try.
- **The affiliate space is far more complex than ever before.** Advertisers are becoming publishers, and social, video, and shopping platforms are all angling for a way into the mix. But marketers can also tackle affiliate marketing one area at a time, rather than feel pressure to use every part right away.
- **The channel will not truly bloom without a more settled set of measurement solutions.** Advertisers must think about how to measure their investments in affiliate to better integrate them into the rest of their ad spending approach. Without an easy way to integrate and compare spending in the affiliate channel with broader media plans, affiliate will struggle to capture more of advertisers' budgets.

Glossary

Affiliate marketing: Method of promotion whereby an advertiser pays a publisher (the "affiliate") for driving its audience to take a specific, measurable digital action within a mutually agreed-upon time frame. Actions can include visiting a retailer's page, purchasing a product online, signing up for an offer, downloading an app, or registering with the advertiser.

Coupon sites: Publishers that earn affiliate commissions by offering coupons to their visitors (e.g., RetailMeNot).

Rewards sites: Publishers that earn affiliate commissions by offering perks or discounts in exchange for transacting through their sites (e.g., Rakuten Rewards).

Content: Industry term for publishers that drive commission-earning behavior using articles or videos (e.g., BuzzFeed, Wirecutter).

Affiliate networks: Networks that provide infrastructure for connecting brands/merchants with publishers and executing affiliate campaigns. They typically charge monthly minimums (e.g., Awin, Rakuten).

Affiliate subnetworks: Aggregators of supply that secure preferential commissions from brands (e.g., LTK, Skimlinks).

Brands Are Warming Up to Affiliate Marketing

Affiliate marketing has been on the margins of the digital advertising ecosystem—even though about 90% of major US brands have operated some kind of affiliate program, per a Rakuten Marketing and Forrester Consulting study published in February 2016. Yet, for the past two decades, the marketing method has battled perceptions that it is an untrustworthy, fringe investment channel.

Without the scale of search, the ease and automation of display, or the pizzazz of experimental technologies like augmented reality, affiliate marketing had trouble breaking through with marketers who wanted their digital investments to be as easy (or as edgy) as possible. But that seems to be changing.

Recent industry trends put affiliate marketing in position for a fresh look by marketers. Over the past five years, marketers have come under more pressure to prove their digital ad spending drives sales or other measurable business results, giving performance advertising channels more cachet. The coronavirus pandemic, which instantly plunged the economy into a brief but severe recession, threw that dynamic into overdrive.

Emerging publishers (and creators) are attracting a new crop of advertisers. The internet's largest social platforms, in their hunt for cost-effective sources of engaging content, have cultivated an entire creative class, collectively called influencers, of those who are used to monetizing their reach and the trust of their social followings.

While affiliate commissions represented a small percentage of US influencers' revenues last year, this group has emerged as an important source of affiliate partners and represents one of the practice's fastest-growing channels. For example, LTK, an app and subnetwork that offers affiliate commissions principally to creators, claims that it was responsible for driving more than $3 billion in retail sales last year.

The media industry's largest players have turned to affiliate marketing to build more direct partnerships with advertisers. Badly outgunned in the battle against those same platforms for digital advertising dollars, media firms see these arrangements as opportunities to better monetize the trust of their readers.

For the most successful publishers, this has grown into a significant source of revenues. For example, BuzzFeed reported that its "commerce and other" revenues, which are driven principally by affiliate commissions, hit $61.6 million in 2021, or 15.5% of its total revenues for the year. BuzzFeed said it was responsible for "approximately $600 million in attributable transactions" for its advertisers.

Those publishers' embrace of the practice has provided fresh visibility to affiliate content and opened the doors to new types of relationships with brands. Affiliate commissions, custom content, display advertising, and content marketing, among other tactics, fit together to forge large strategic partnerships.

Looming economic uncertainty could create more opportunity. Marketers are likely to lean on affiliate marketing even harder if there is a prolonged recession. Jim Nichols, editor at independent trade publication Martech Record, said that the market has grown around 10% every year, and that there could be even faster growth from traditional affiliates during a downturn.

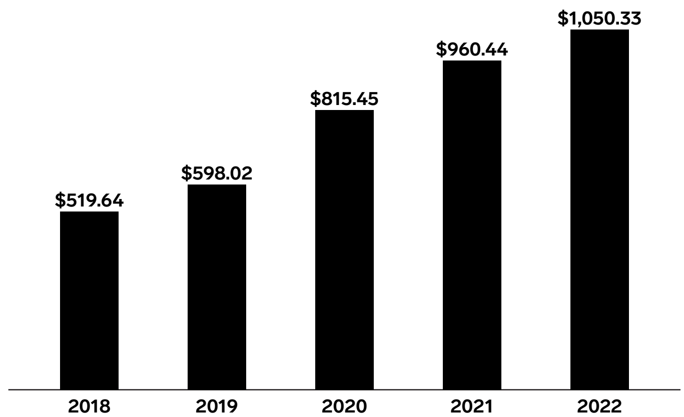
The Pandemic Gave Way to a Boom for Affiliate Marketing

The surge in consumer time and money spent online because of the pandemic led to a significant boom in the affiliate marketing ecosystem. Much of the increase in ecommerce activity was facilitated by affiliates across a range of channels—from established formats such as coupons and loyalty programs to emerging ones like influencers and BNPL providers.

Publicly available data does not map precisely to the start of the pandemic, but according to research by The Performance Marketing Association (PMA) and PwC, US affiliate marketing grew from $6.2 billion in 2018 to $9.1 billion in 2021. While industry observers do not regularly measure or forecast the affiliate marketing ecosystem, these figures were comfortably ahead of projections made in 2016, when the Rakuten Marketing and Forrester Consulting study forecast that affiliate marketing would grow to $6.82 billion by 2020. That same report estimated that spend would reach $5.94 billion in 2018.

But the report could not have foreseen the significant uptick in ecommerce activity spurred by the pandemic. US retail ecommerce sales rose 84.8% between 2018 and 2021, to $960.44 billion, according to our estimates.

US Retail Ecommerce Sales, 2018-2022
billions



Note: includes products or services ordered using the internet, regardless of the method of payment or fulfillment; excludes travel and event tickets, payments such as bill pay, taxes, or money transfers, restaurant sales, food services and drinking place sales, gambling and other vice goods sales
Source: eMarketer, June 2022

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And, to be sure, affiliate was not the only digital ad market in the US to benefit from these changes:

- Between 2019 and 2021, spending on retail media more than doubled. We estimate that retail media spend grew from $13.23 billion in 2019 (the year we began tracking this space) to more than $31.06 billion in 2021.
- Search ad spending, a category whose budgets many affiliate marketers have coveted for years, grew 78.9%, rising from $48.30 billion in 2018 to $86.43 billion in 2021.
- Influencer marketing, an emergent category that figures to overlap with the affiliate space, more than doubled in spending over the same period, growing from $1.91 billion in 2018 to $3.90 billion in 2021.

For more on how one of these channels evolved during the pandemic, check out our August 2022 report **"Influencer Marketing 2022: Spending Rises Amid Economic Uncertainty, and TikTok Gains on Competitors."**

Amber Venz Box, co-founder and president of influencer shopping app LTK, said that between 2020 and 2021, there was a doubling of business collaborations between brands and influencers on the platform. It is difficult to compare the trajectories of these industries to affiliate marketing; The PMA did not publish estimates for future growth.

Investments Made Into Proven Value-Driven Tactics

Between 2019 and 2021, the investments in affiliate marketing flowed mostly to proven channels. While affiliate marketing practitioners have been focused on content sites and their growing roles over the past couple years, brands spent 2020 and 2021 pouring resources into channels they knew to be effective.

In 2018, 41% of US affiliate marketing budgets went to either cash-back, loyalty, and rewards publishers (27%) or coupon, voucher, and rebate platforms (14%), according to PMA figures. By 2021, those two publishing channels accounted for about half (51%) of the dollars spent in the affiliate space, chiefly thanks to cash-back, loyalty, and rewards' share growing to 35%; coupon, voucher, and rebate rose to 16%.

Other channels that have grown significantly include:

- **Buy now, pay later**, which has piqued the interest of US consumers (and regulators) because as a point-of-sale installment loan, it allows people to spread out payments for goods over time
- **Other technology solutions**, such as RevLifter or UpSellit, which use automation and machine learning to target personalized offers to customers already on a merchant's website
- **Influencers**, who often work with advertisers using a mixture of upper-funnel and lower-funnel tactics, comprised 5% of all affiliate ad spending in 2021, per the PMA data

Emerging channels could have significant implications for the perception of affiliate marketing among marketers. Affiliate had been viewed as a way to drive sales among consumers who care more about price than brand. Many of the space's newest advertisers were brought into the fold by emerging channels, including influencers, whose endorsements can theoretically elevate a brand and its products more than a discount code or coupon does.

"Our category has really focused on diversifying the partner ecosystem, moving to content," said Matt Gilbert, CEO of Partnerize. "What does that look like as we move into the next year? Is there a regression to the coupon and cash-back behavior, the last-click behavior?"

Affiliate Is Gaining Momentum With Consumers

Consumers are growing increasingly comfortable with incorporating affiliates into their shopping behavior. It is difficult to find a comprehensive picture of how widely consumers embrace affiliate marketing. But there are signals that they are, despite the return of in-person shopping and inflation-induced cutbacks in consumer spending.

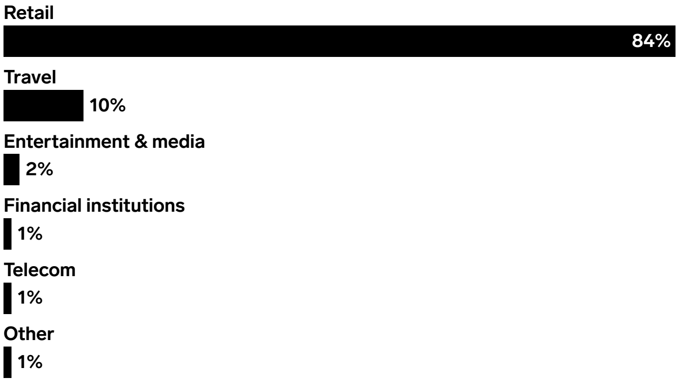
- Throughout H1 2022, the volume of US traffic that affiliates were sending to advertisers' sites was up 40% year over year on the Awin platform, according to Alexandra Forsch, president of Awin US.
- During the same period, many large affiliate publishers, including Honey, LTK, and Lyst, saw the number of US user sessions on their respective mobile apps rise significantly compared with H1 2021, according to Apptopia data.

New Advertisers Dip Their Toes Into Affiliate Marketing

Like most digital advertising channels, the affiliate marketing landscape is defined by retail ad spending. Nearly 80% of the dollars invested in the US affiliate marketing space last year were spent by retailers, according to PMA data. Retail also claimed about 80% of the ecommerce revenues generated through affiliate marketing.

That is significantly higher than it was in 2018, when retail accounted for half of spending, also per The PMA. Other significant categories include financial institutions, travel, and entertainment and media.

US Performance Marketing Ecommerce Revenue Share, by Industry, 2021
% of total



Note: automotive revenue share was less than 1%; numbers may not add up to 100% due to rounding
Source: The Performance Marketing Association (PMA), "2022 Performance Marketing Industry Study" conducted by PwC, Aug 2, 2022

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The pandemic compelled advertisers in several categories to try affiliate marketing for the first time. Fast-casual restaurants, for example, needed to find ways to boost their delivery and takeout businesses in the early days of the pandemic, so they began operating affiliate marketing programs.

"We're seeing brands that don't have things to sell starting up with affiliate [marketing]," said Patricia Marange, managing director and head of affiliate marketing and performance partnerships at Neo Media World. "The way I've redefined it is, 'Is there a customer action that you value that we can dip into?'"

Many newer advertisers are choosing content-based channels over discount-focused methods. These new brands, particularly the ones looking to position themselves as high-end or luxury purchases, are eschewing the coupon- and discount-focused subchannels in favor of influencer or content partnerships.

Those partnerships typically involve discounts or special rates, but the perceived combination of endorsement from a trusted authority or influencer makes them a more attractive place to invest.

Brands, Affiliates Go Through Trial and Error in Building Partnerships

For most of the past two decades, the digital ad ecosystem trended away from relationship-based business as it embraced the opportunities inherent in automation. Affiliate marketing was almost structurally incapable of following the automation trend.

On the whole, retailers, affiliate networks, and publishers were resistant to making their links biddable. In programmatic advertising, all the ad inventory on a page (or in a video) can be plugged into exchanges that allow lots of advertisers to vie for placements, largely because that inventory is standardized in its dimensions, file sizes, etc.

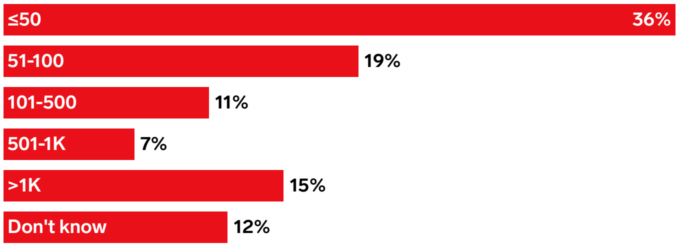
It's a bigger challenge with affiliate content. For instance, imagine a shopping guide that recommends the best camping tents, and the site's owner is considering automating its affiliate links. That publisher will automatically see reduced demand, because the article recommends one specific product maybe only a small handful of retailers sell. The specificity of the recommendations leaves the publisher with zero room to maneuver: Picture the customer's reaction if they clicked on a link to buy a Coleman tent and instead were directed to an REI-brand tent because REI won the bid.

That demand is going to be reduced still further because many retailers do not share (and are not interested in sharing) real-time inventory availability with the networks. Nor are retailers keen on building the tech needed to modify the commissions they offer based on that supply. All of this keeps publishers in the driver's seat of the relationship, which helps keep commissions high.

Elements of automation have begun to creep in, yet it remains a relationship-based business, where finding, building, and maintaining those connections remain key.

More than one-third of US marketing executives engaged in affiliate marketing maintain 50 partners or fewer, according to Impact.com research from October 2021.

Number of Company Affiliate Partnerships According to US Marketing Executives, Oct 2021
% of respondents



Source: Impact.com, "The State of Partnership Marketing," Jan 13, 2022
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The most productive affiliate partnerships can be powerfully symbiotic and lucrative. An affiliate relationship between an outdoor goods manufacturer and a hunting and fishing magazine, for example, could be worth tens of thousands, if not millions, of dollars per year to both sides. Yet, figuring out which relationships are going to be productive still requires trial and error.

While some networks are taking steps to reduce the guesswork and effort for advertisers, the tests still need to be done. "From the advertiser's point of view, you don't know if you're ever going to hit that [level of success]," said Breton Fischetti, vice president of performance revenue at Recurrent Ventures, which owns Outdoor Life magazine.

Affiliate Marketing's Growth Creates New Challenges for Brands and Their Partners

The Pitfalls of Measuring Affiliate Marketing

The question of why affiliate marketing remains a relatively small digital advertising channel has an ironic answer: It's difficult to measure. Despite being nimble, low-cost, and efficient by some measures, most of the largest practitioners cannot—or will not—provide impression-level data in their campaigns.

That makes measuring or comparing affiliate marketing with other channels difficult, if not impossible, according to executives we interviewed.

"[Brands are] spending all this money on media mix modeling readouts," said Kristen Pulver, vice president of performance media at Horizon Media. "Affiliate always has all these asterisks tied to its performance."

Marketing insiders said some of the bigger publishers fear that if they provided impression-level data, the results wouldn't be as great as desired.

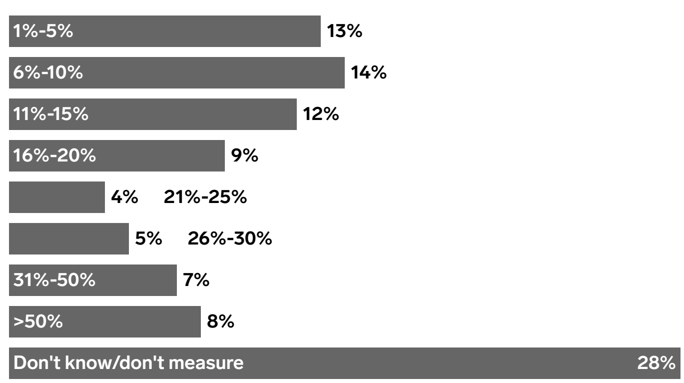
Agencies and advertisers are working to find solutions to this problem.

- Some are spending more money with sources that can provide a detailed level of reporting, migrating their budgets out of affiliate networks and into direct relationships with publishers that can provide impression-level reporting and data.
- Growing numbers of content publishers are working with advertisers on multidimensional programs that include a combination of media, paid social, and affiliate commissions that come with impression-level data.

Absent a large, standardized solution that the industry can rally around, the amounts of money most brands invest in the channel remain low, and so does the channel's effect on advertisers' bottom lines.

According to the Impact.com survey, over a quarter (28%) of US marketing executives said they do not know (or measure) the revenues driven by affiliate marketing. That is a telling statistic for a channel whose practitioners put return on ad spending at the center of their own marketing.

Share of Company Revenues Driven by Partnerships According to US Marketing Executives, Oct 2021
% of respondents



Source: Impact.com, "The State of Partnership Marketing," Jan 13, 2022
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Confusion Over Ever-Shifting Roles

Despite (or possibly because of) the size of the affiliate market, different players have brought the basic business model—advertiser pays publisher for driving its audience to take a specific, measurable digital action—to new content formats and channels.

As more companies have begun participating in affiliate marketing, it has created confusion about who plays what role. For example, a brand seeking to partner with influencers to both promote a new product and drive its sales could be forced to coordinate the efforts of its public relations agency, its affiliate agency, and its media agency, as well as any existing in-house teams.

"Until brands themselves really understand how to treat influencers, and who owns them—and they can be fully across the funnel—it's going to be hard for them," Marange said.

This proliferation of channels has compelled some affiliate companies to act like brands and raise their own profiles. Rakuten Rewards, for example, ran an ad during the Super Bowl in 2022, a first for the company. Many BNPL firms, banks, travel sites, and others were previously advertisers, and now they're publishers.

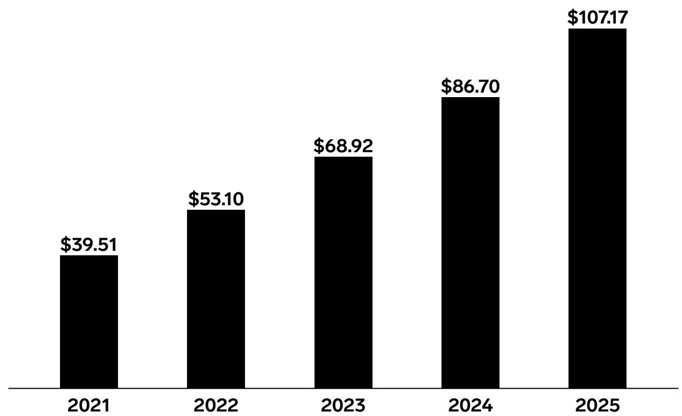
This blurring of lines has the potential to slow the investment headed into emerging areas of the affiliate market.

Social Platforms Looking to Play More Direct Roles

As affiliate marketing becomes more important to influencers, and as social platforms continue their hunt for revenue growth and audience data, the platforms that provide distribution and audiences have taken an interest in the space, hoping to carve out a role—and, by extension, a piece of the revenues—in the process.

Social platforms already play an indirect but significant role in the affiliate ecosystem. The amount of time American consumers spend on social media continues to increase, and growing percentages of consumers feel comfortable buying products within their walled gardens. According to our forecast, US retail social commerce sales will more than double over the next three years, reaching $107.17 billion by the end of 2025.

US Retail Social Commerce Sales, 2021-2025
billions



Note: includes products or services ordered via social networks and messaging apps, such as Facebook, Instagram, Pinterest, WeChat, Line, VK, and others, regardless of the method of payment or fulfillment; excludes travel and event tickets, tips, subscriptions, payments such as bill pay, taxes, or money transfers, food services and drinking place sales, gambling and other vice goods sales
Source: eMarketer, July 2022

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But efforts to muscle in and participate more directly in affiliate marketing deals either are just forming or have yielded mixed results.

- Roughly a year after launching an affiliate tagging program with influencers, Instagram told participants in late July that it would shut down the program, in favor of a creator marketplace. Instagram is currently encouraging both brands and users to use a native tagging tool, which does not support affiliate commissions, but does support advertising.
- YouTube recently began testing a native product tagging program. Creators participating in the tests are receiving flat fees, rather than commissions, for using the feature.
- TikTok, the fast-growing social platform, also operates an affiliate program, though it competes with other TikTok ad programs for advertiser attention.

Many of the advertisers selling the goods that influencers could promote with affiliate tags are leery of becoming too reliant on platforms. That led to tepid use of Instagram Shops, which was a required step for any brand hoping to use the now-shuttered affiliate program. Many brands that did use Instagram Shops made only small selections of inventory available through these systems.

Another contributing factor to these mixed results is that selling ads is more efficient and lucrative than affiliate commissions. The current native tagging capability, which brands can use to find user posts that can be used as ads, fits more naturally into Facebook and Instagram's ad infrastructure.

Finally, while the platforms have done as much as they can to compel creators to focus their time and energy on one platform, the reality is that many creators work across multiple platforms. That minimizes a singular platform's ability to put itself at the center of any kind of partnership between advertiser and creator.

There's No More Free Lunch From Publishers and Influencers

As recently as a few years ago, a brand that had the right relationships with reputable editorial outlets might be able to send some free items and the offer of a hefty commission, then see their products featured in those outlets' content. Thanks to affiliate's raised profile among traditional content publishers, those days are over.

"You do need to have a budget to put forth and kick off that relationship," said Emily Chan, the founder of Digital Disco, an affiliate marketing consultancy.

Chan noted that a similar shift has taken place among influencers, who now see free goods from brands more as a conversation starter than an impetus to post.

After the rest of the digital media world noticed that traditional content publishers, ranging from Condé Nast to Dotdash Meredith to New York Magazine, were generating tens of millions of dollars in revenues from commerce content, competitors swept in. "It was greenfield for large-scale publishers on search," said Recurrent Ventures' Fischetti. "The easy money's gone. Now it's about scale and sophistication."

How Brands Can Test and Measure Affiliate Marketing

As the digital media ecosystem grows more focused on driving ecommerce activity and harvesting first-party data from consumers, affiliate marketing could grow into a more strategically important channel for marketers.

Here are some things to bear in mind for any marketer looking to either test or increase spending in this channel:

Commit to the Commitment

Prepare for the long haul in building relationships with publishers. Most performance-oriented ad spending channels carry hidden costs and difficulties that make them less of a sure thing than they appear. Affiliate marketing is no different. Whether an advertiser starts by going directly to publishers or committing to a network, they should be prepared for a prolonged stretch of relationship-building and trial and error.

Build Your Own Measurement Framework

Most of the top affiliate networks provide some access to the data needed to demonstrate the value that affiliates provide. Understand what those options are and think about how they can—or cannot—be integrated into your brand's current ad measurement and attribution methodologies.

Go Up and Down the Funnel

Consider using affiliate as a tool to drive progress across multiple key performance indicators (KPIs), even if it typically takes more work. Affiliate got its start—and much of its earlier reputation—as an ad spending channel that thrived at the very bottom of the funnel, and marketers have proven that it can be used to drive awareness, leads, and consideration.

Keep an Eye on Social Platforms

Because of the role that these platforms play in many publishers' and influencers' affiliate businesses, it will be important to keep abreast of any changes the platforms make to their own product tagging and creator commerce features.

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Insider Intelligence Interviews

Insider Intelligence and eMarketer research is based on the idea that multiple sources and a variety of perspectives lead to better analysis. Our interview outreach strategy for our reports is to target specific companies and roles within those companies in order to get a cross-section of businesses across sectors, size, and legacy. We also look to interview sources from diverse backgrounds in order to reflect a mix of experiences and perspectives that help strengthen our analysis. The people we interview for our reports are asked because their expertise helps to clarify, illustrate, or elaborate upon the data and assertions in a report.

Amber Venz Box
Co-Founder and President
LTK
Interviewed June 1, 2022

Anthony Capano
Managing Director, North America
Rakuten Advertising
Interviewed May 20, 2022

Emily Chan
Founder
Digital Disco
Interviewed August 30, 2022

Breton Fischetti
Vice President, Performance Revenue
Recurrent Ventures
Interviewed June 1, 2022

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Awin
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