



Partnerize

U.S. Retail Affiliate Marketing Sales Index

Updated through June 30th, 2024



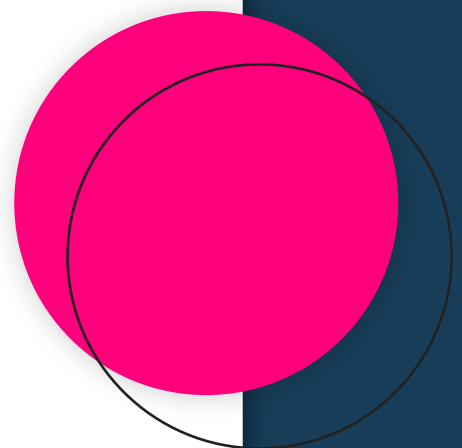


Introduction

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 2023.

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.



Revenue growth, by vertical, through June 2024

Accessories & Jewelry



+54% YoY

Health & Beauty



+21% YoY

Sports & Fitness



+3% YoY

Home & Garden



-4% YoY

Other



-22% YoY

Clothing & Apparel



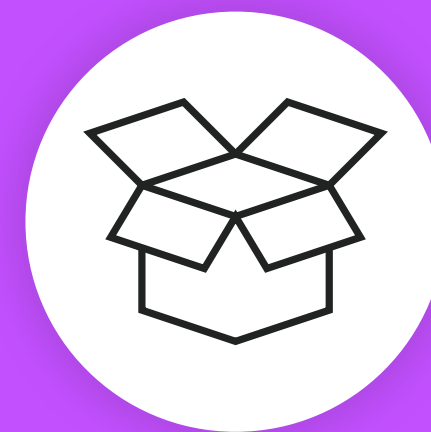
-22% YoY

Food & Drink



-23% YoY

Gifts & Flowers



-24% YoY

Computers & Electronics

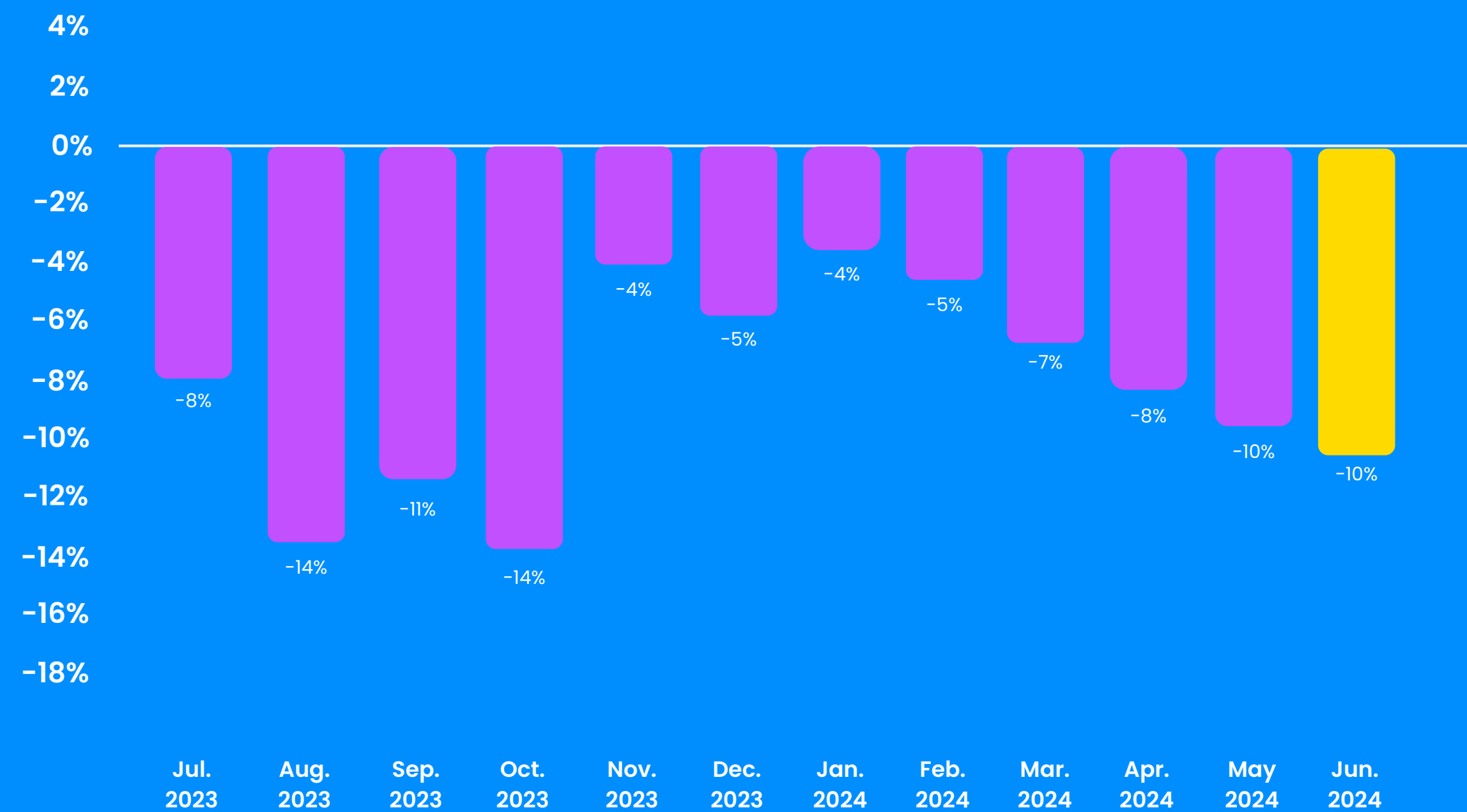


-33% YoY

The "Other" category consists of the following verticals: Phonecard Services, Travel, Business, Art/Photo/Music, Shops/Malls, Books/Media, Family, Pets, Smoking & Tobacco, Education, Baby, Adult, Hunting & Firearms, Insurance, Automotive, Entertainment, Medical, Games & Toys, Commerce, Web Services, Financial Services, Marketing, Recreation & Leisure and Dating.

Monthly revenue trends

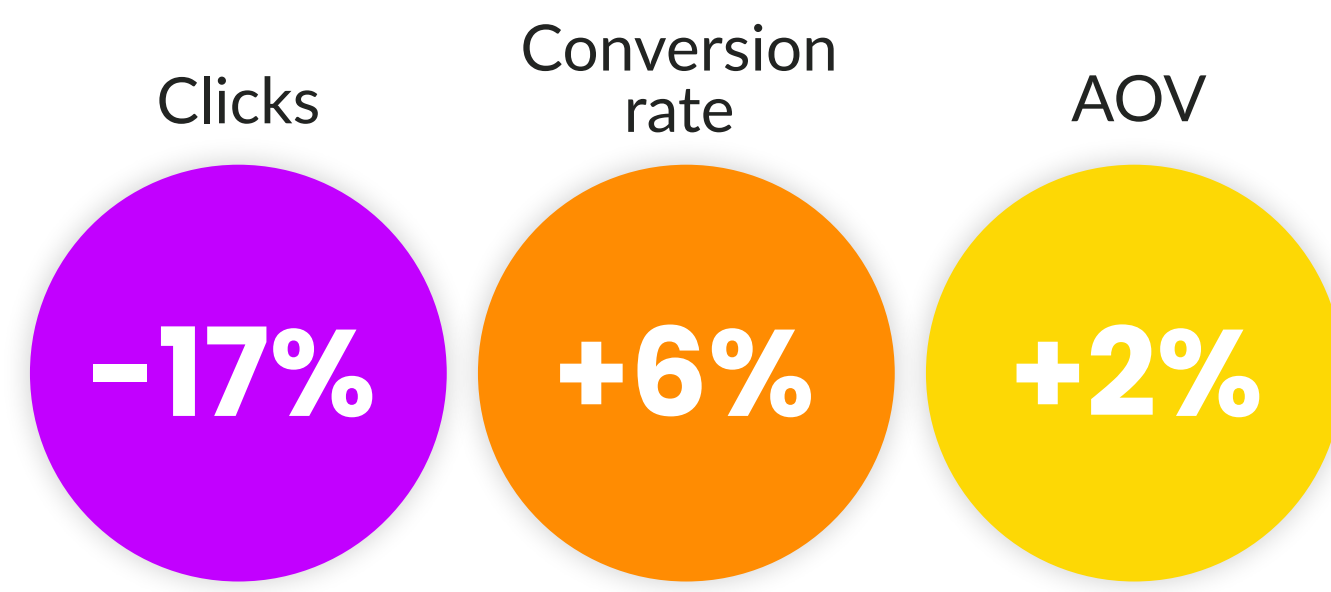
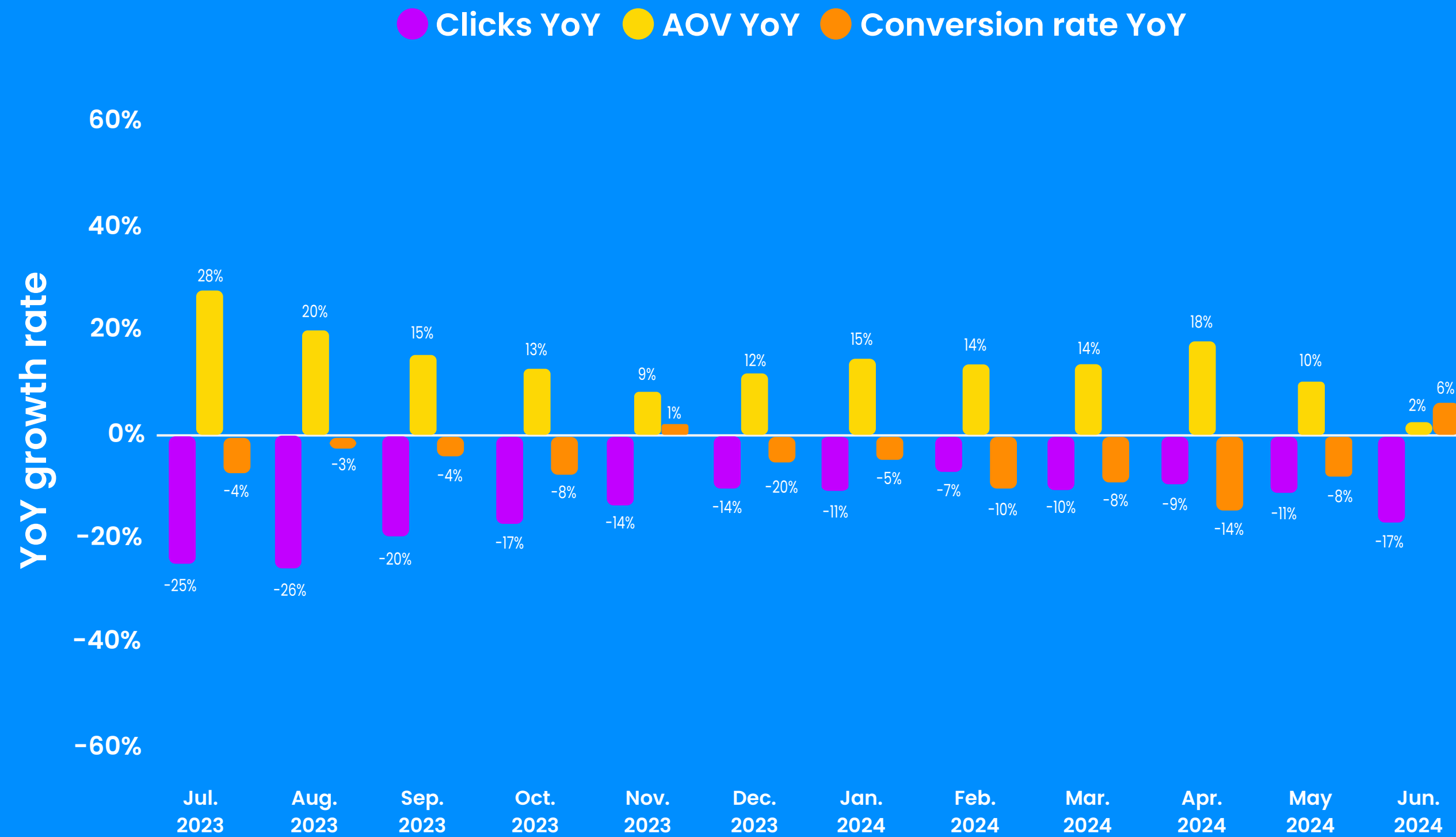
Gross Revenue YoY Growth



-10%

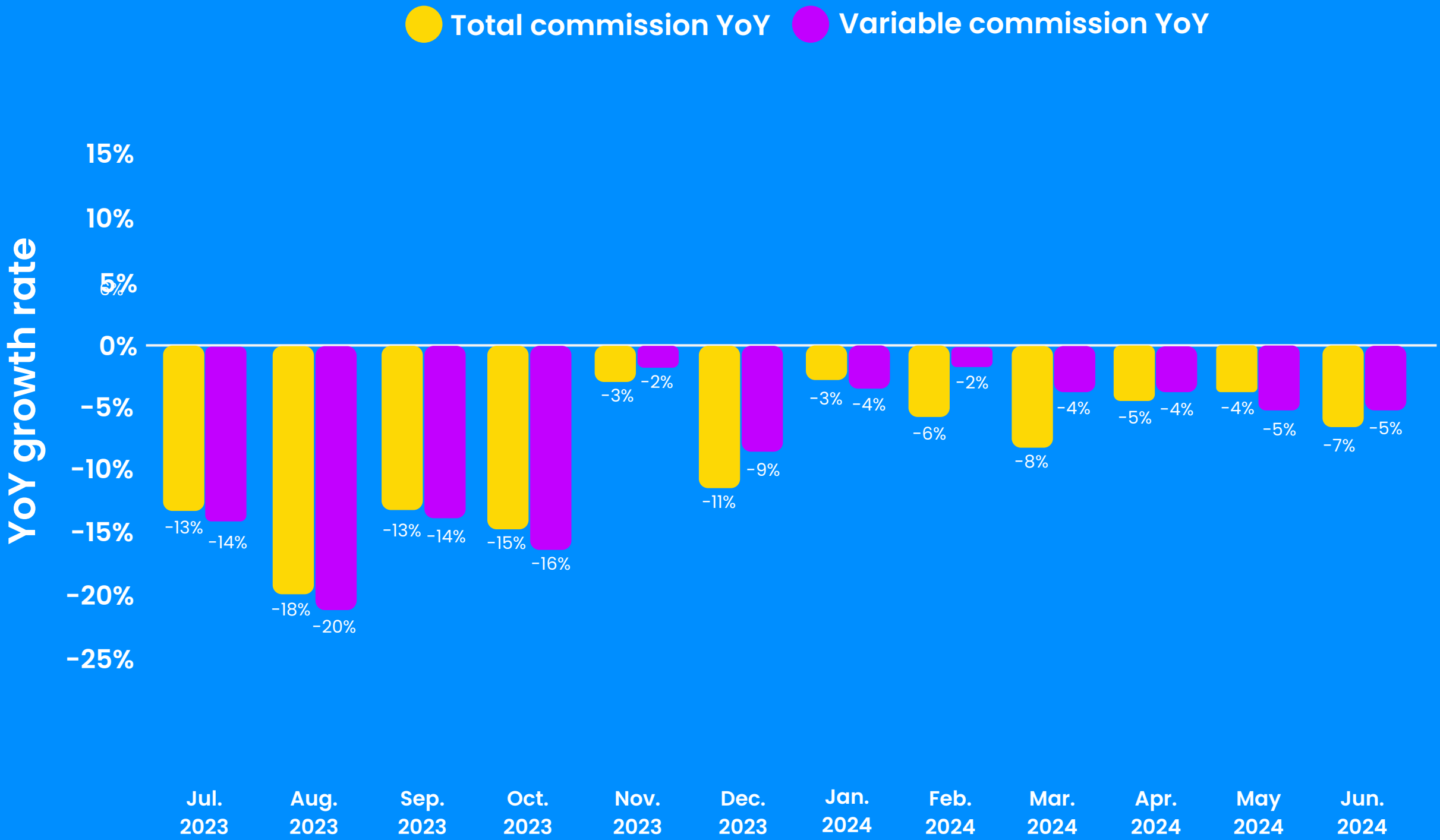
Gross Revenue has decreased by 10% YoY in June 2024.

Drivers of monthly revenue growth



In June 2024, there was a decrease in revenue and it was made up by a decrease in clicks (17%), an increase in conversion rate (6%) and an increase in AOV (2%).

Monthly commission trends



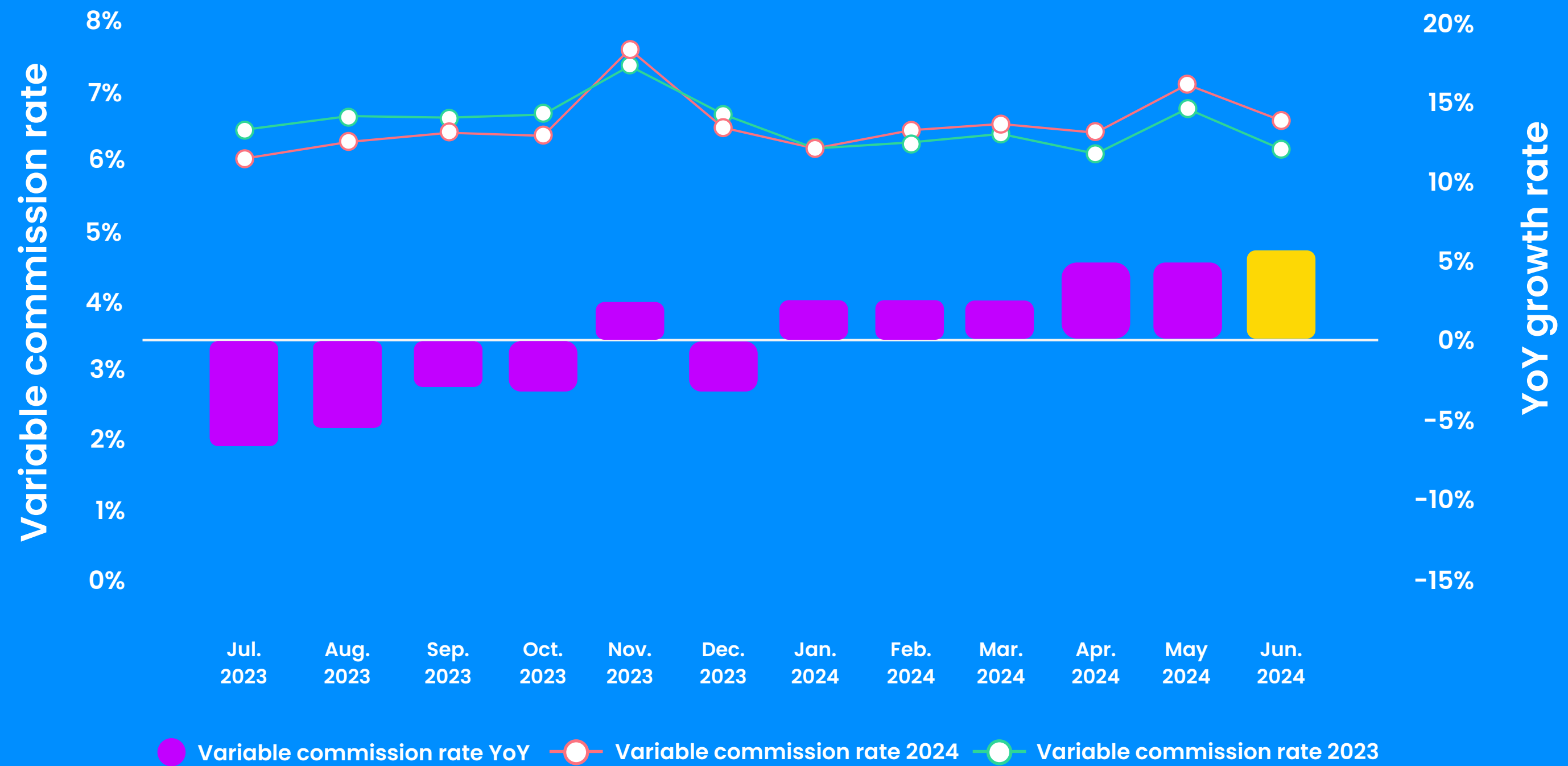
-7% **-5%**

In June 2024 variable commission is down 5%, and total commission is down 7%.

- 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

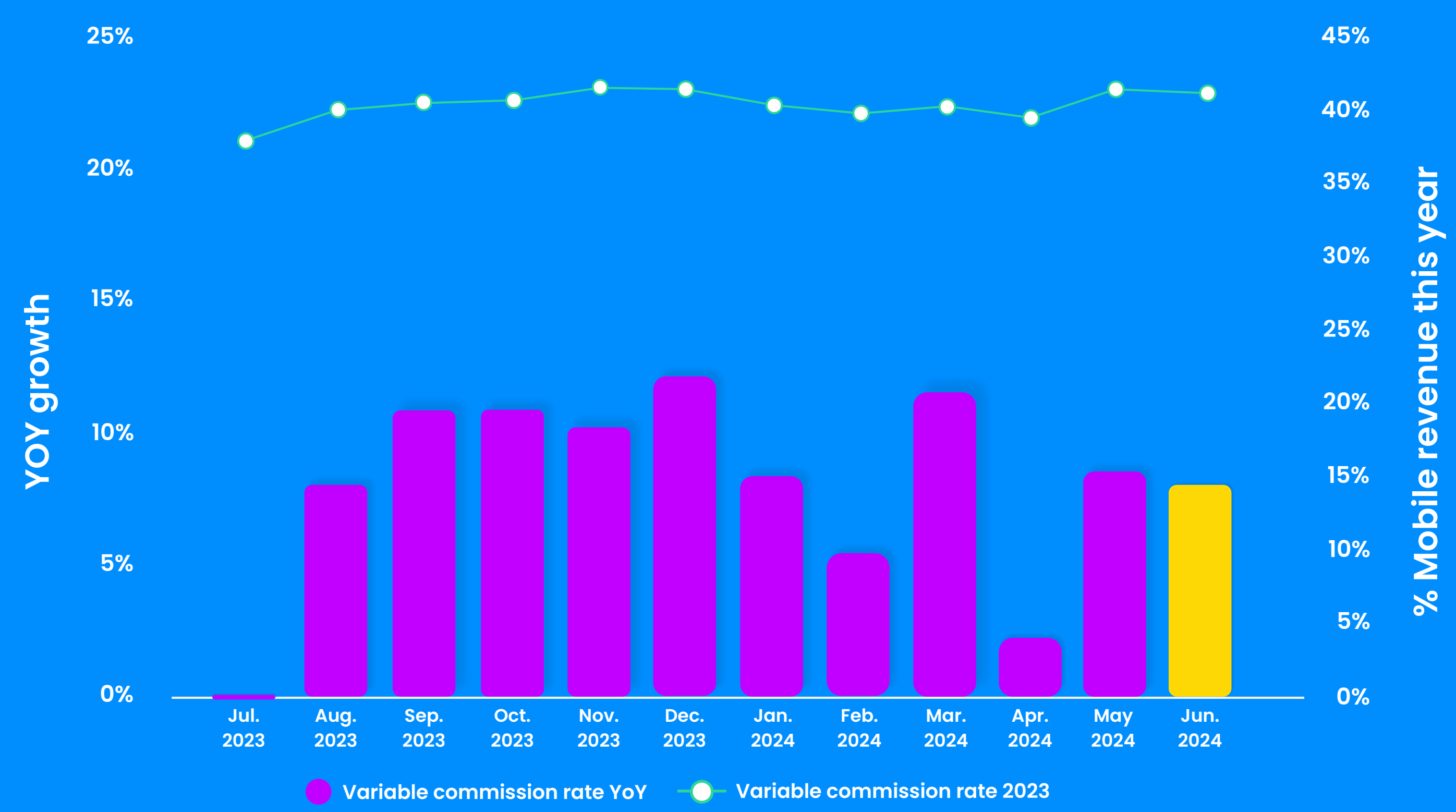


6.6%

Variable commission rates in June 2024 were at 6.6%, and 6% increase from June of 2023.

Monthly mobile revenue share

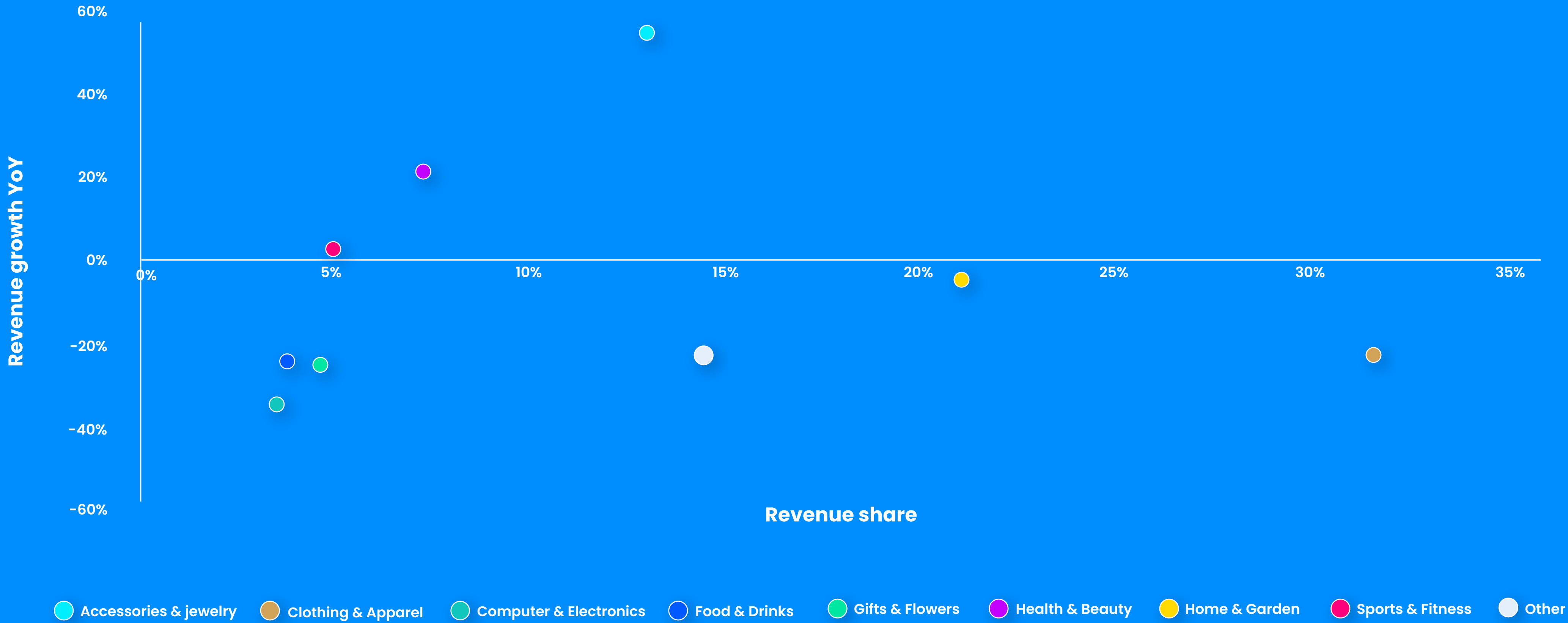
% of revenue from mobile



41%

Percentage of revenue from mobile was 41% in June 2024, an 8% increase over the last year.

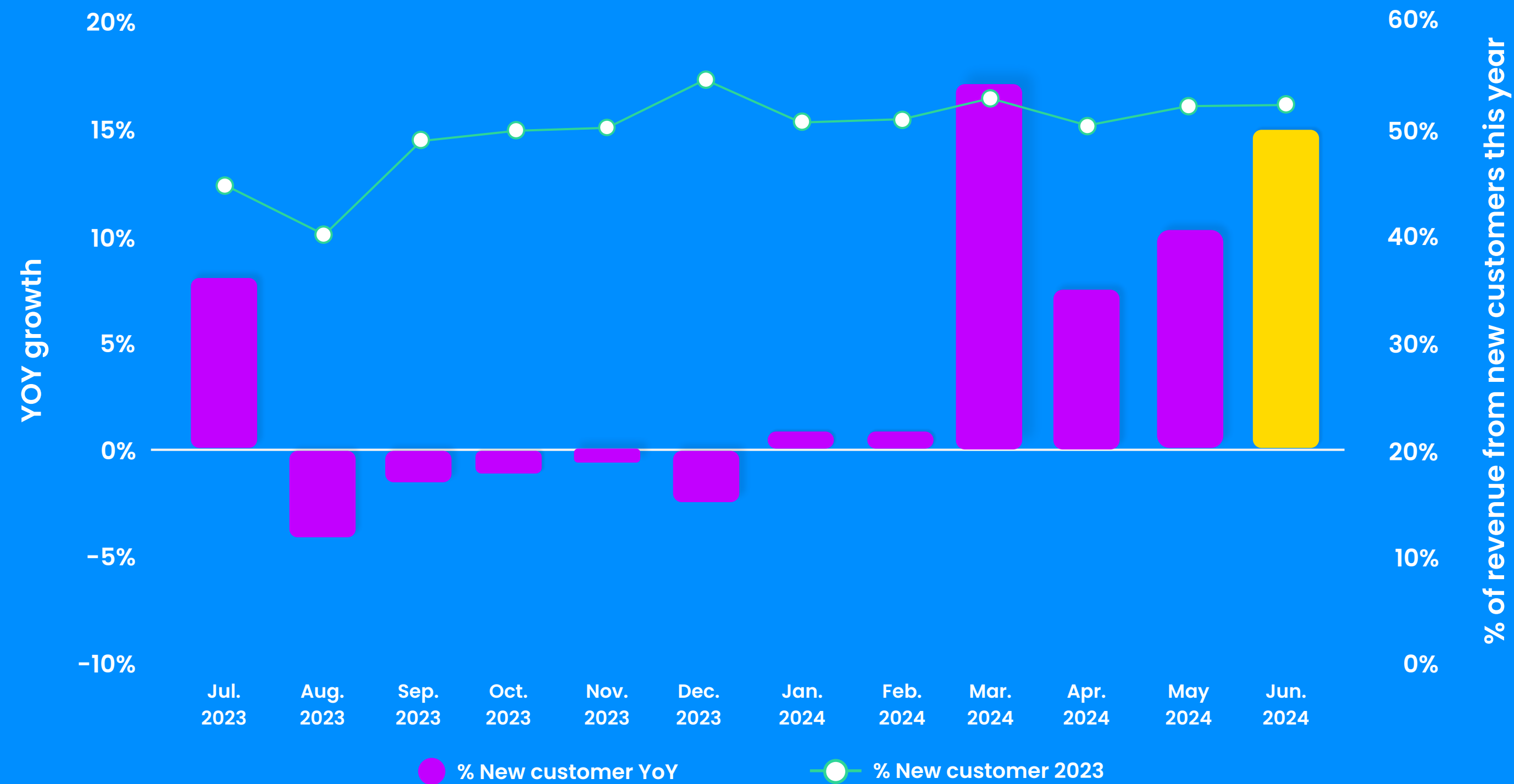
Revenue growth by advertiser vertical



The "Other" category consists of the following verticals: Phonecard Services, Travel, Business, Art/Photo/Music, Shops/Malls, Books/Media, Family, Pets, Smoking & Tobacco, Education, Baby, Adult, Hunting & Firearms, Insurance, Automotive, Entertainment, Medical, Games & Toys, Commerce, Web Services, Financial Services, Marketing, Recreation & Leisure and Dating.

Monthly new customer revenue share

% of revenue from new customers

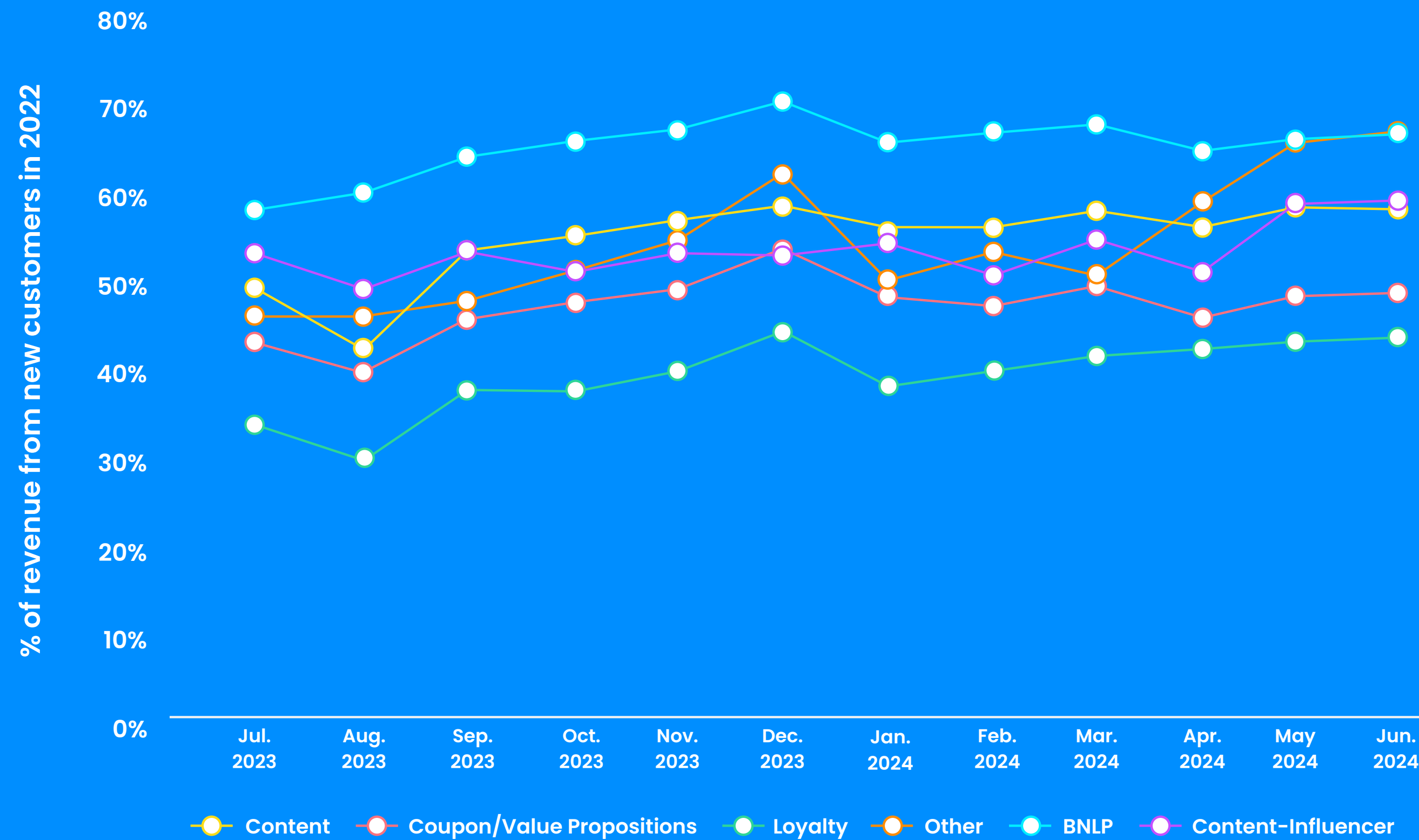


52%

In June 2024, the percentage of revenue acquired from new customers is 53%, and a 15% YoY increase.

New customer revenue by publisher category

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



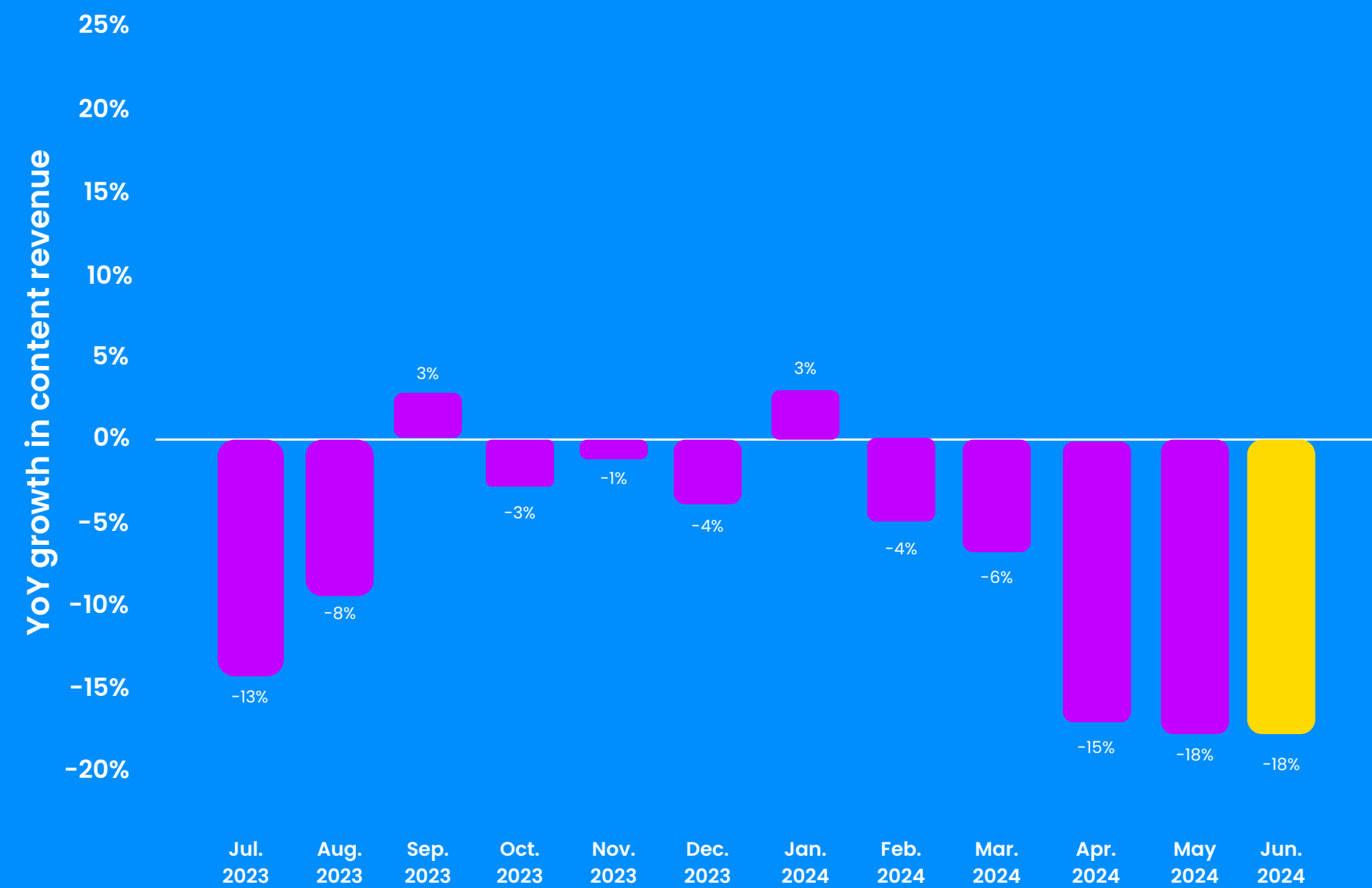
66.92%

The June 2024 percentage of revenue from new customers by partner category:

- Content-Influencer: 60.19%
- Other 67.96%
- Content 59.30%
- Coupon 49.56%
- Loyalty 44.72%
- BNPL 60.19%

Content YoY revenue and commission trends

Content revenue YoY change



Growth in the content partner category has decreased by 18% in June 2024.

Content publisher share of variable commission



In June 2024, share of commission for content partners is 44%, down 10% YoY.

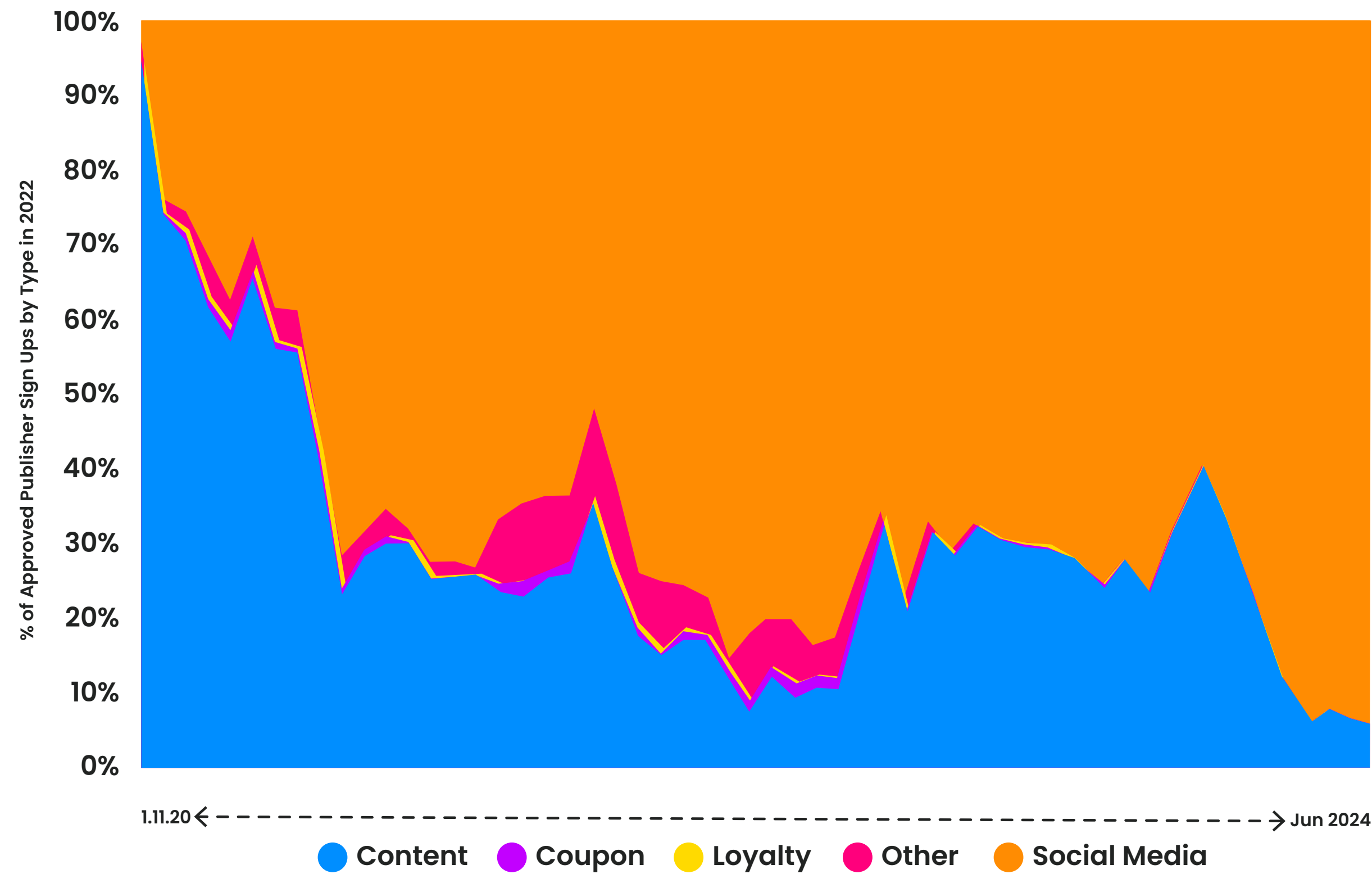
Publisher partner application growth YoY



-26%

Partner applications saw a 26% decrease YoY in June 2024.

% of approved publisher sign ups by type

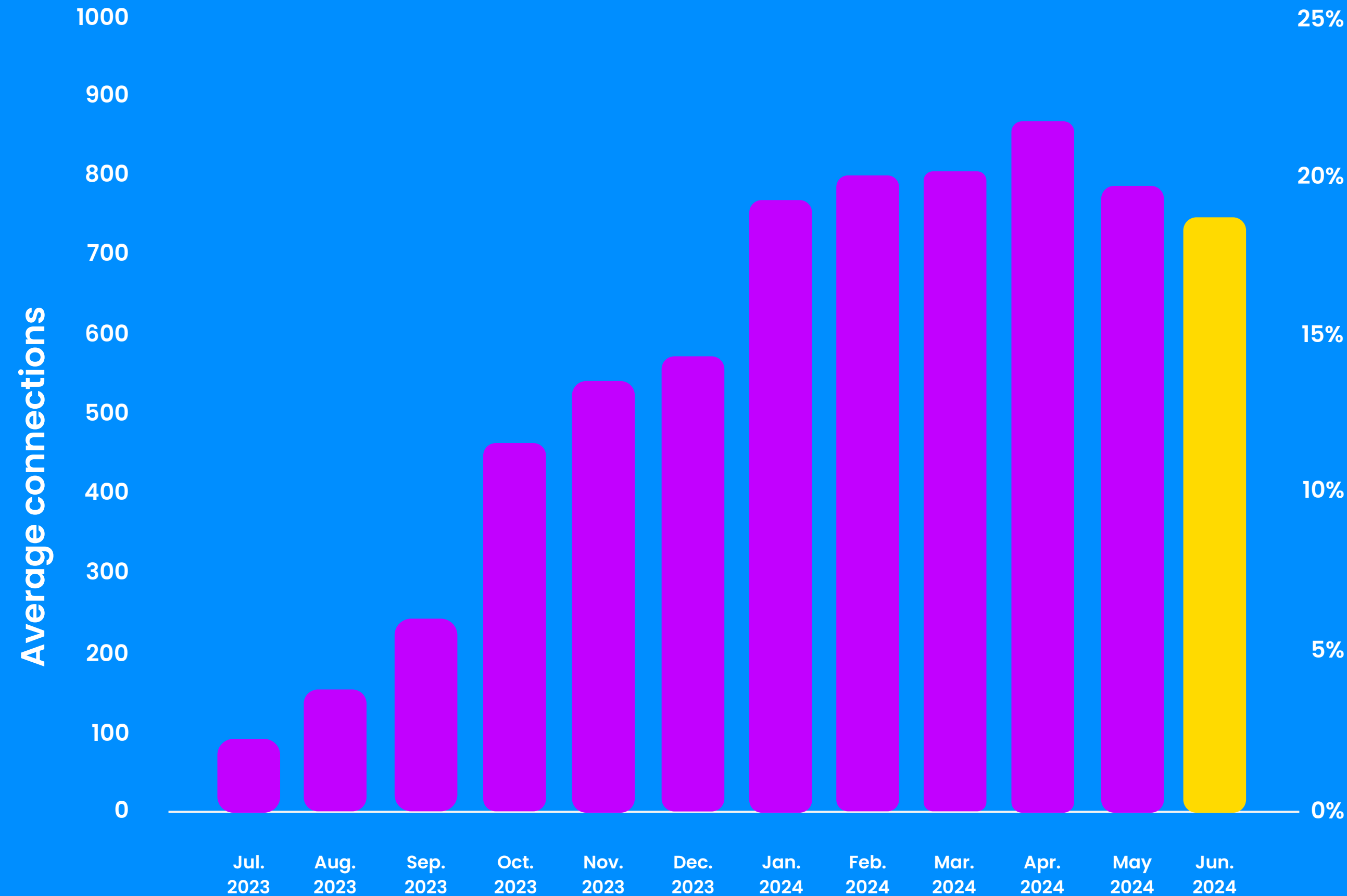


Social media and content partners make up the majority of new publishers joining the Ascend platform.

The trends have remained pretty consistent throughout the past year.

Advertiser-Partner connections

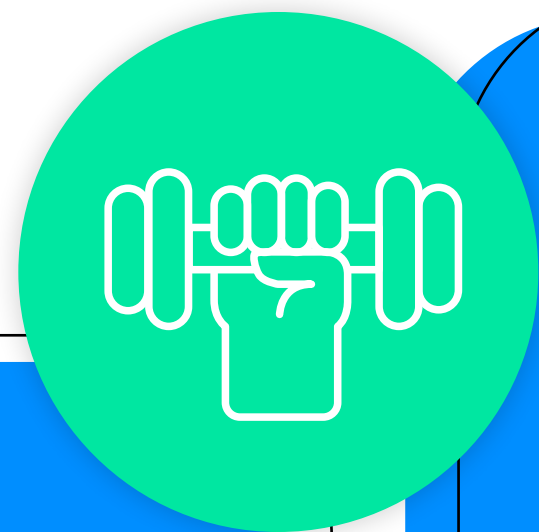
A connection between an advertiser and publisher is when the programs are joined.



18.77%

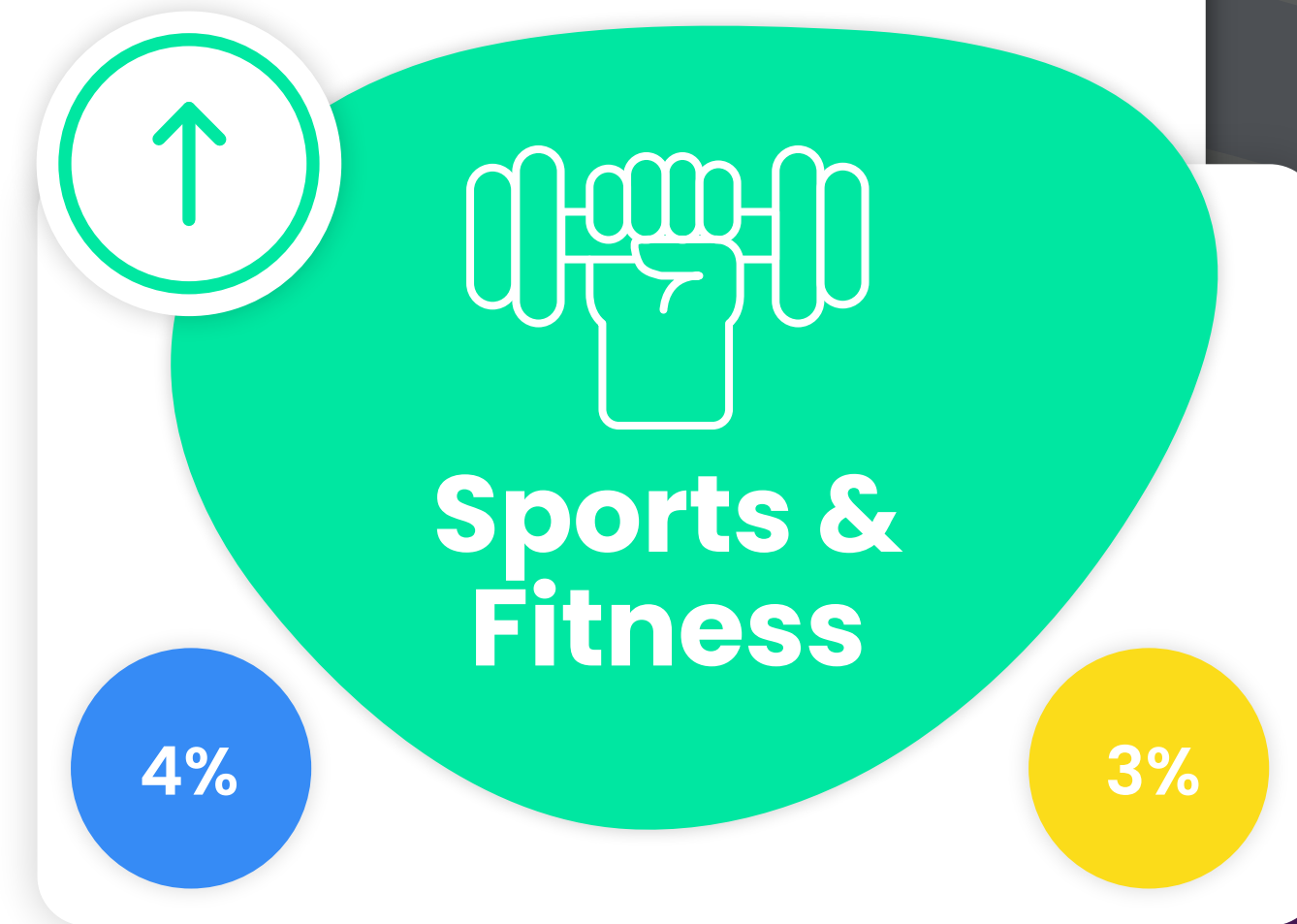
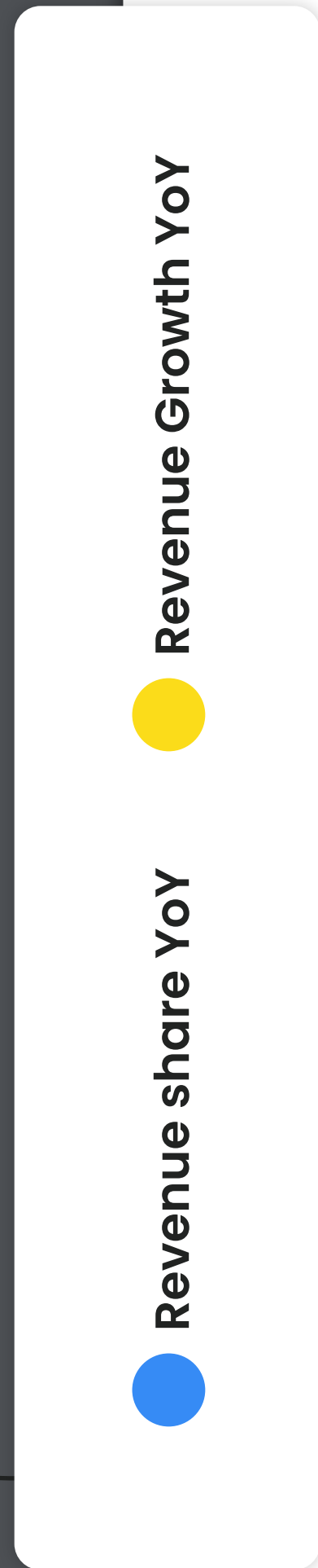
In the month of June, we saw a 18.77% increase YoY in the average number of connections per advertiser. The number of advertiser-publisher connections that are generating revenue in June 2024 is 19, down 4.8% YoY.

Insights by vertical.



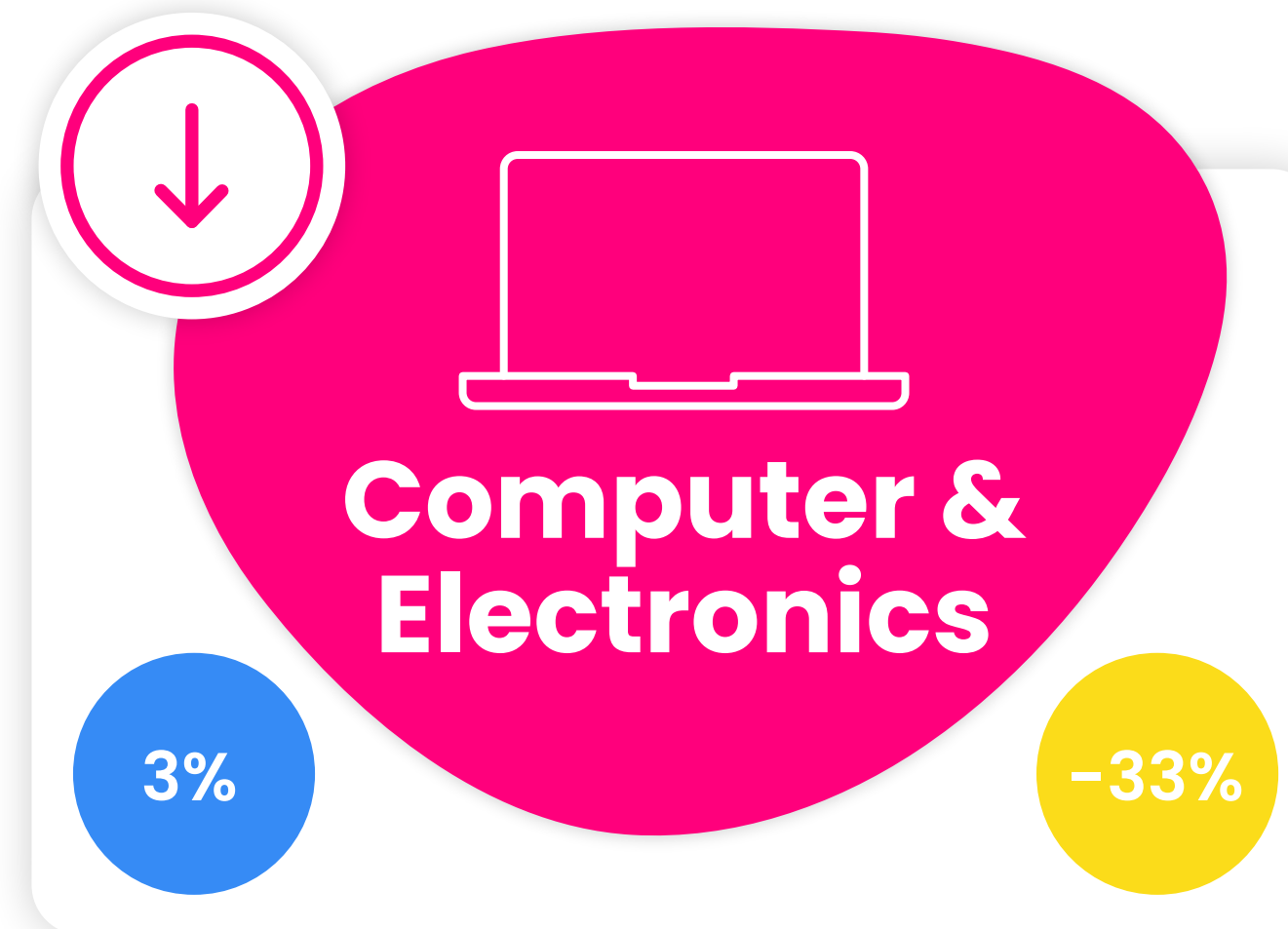
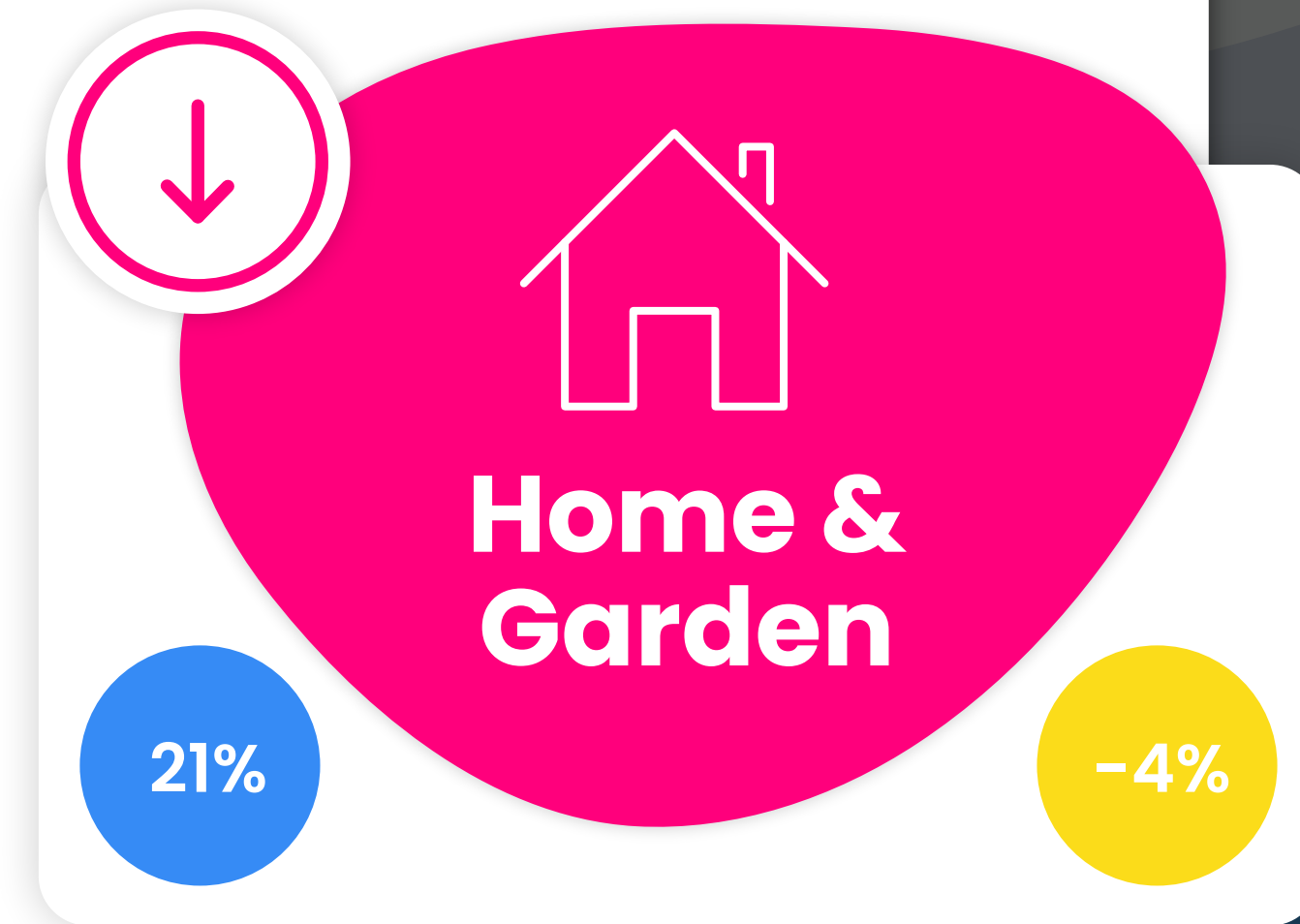
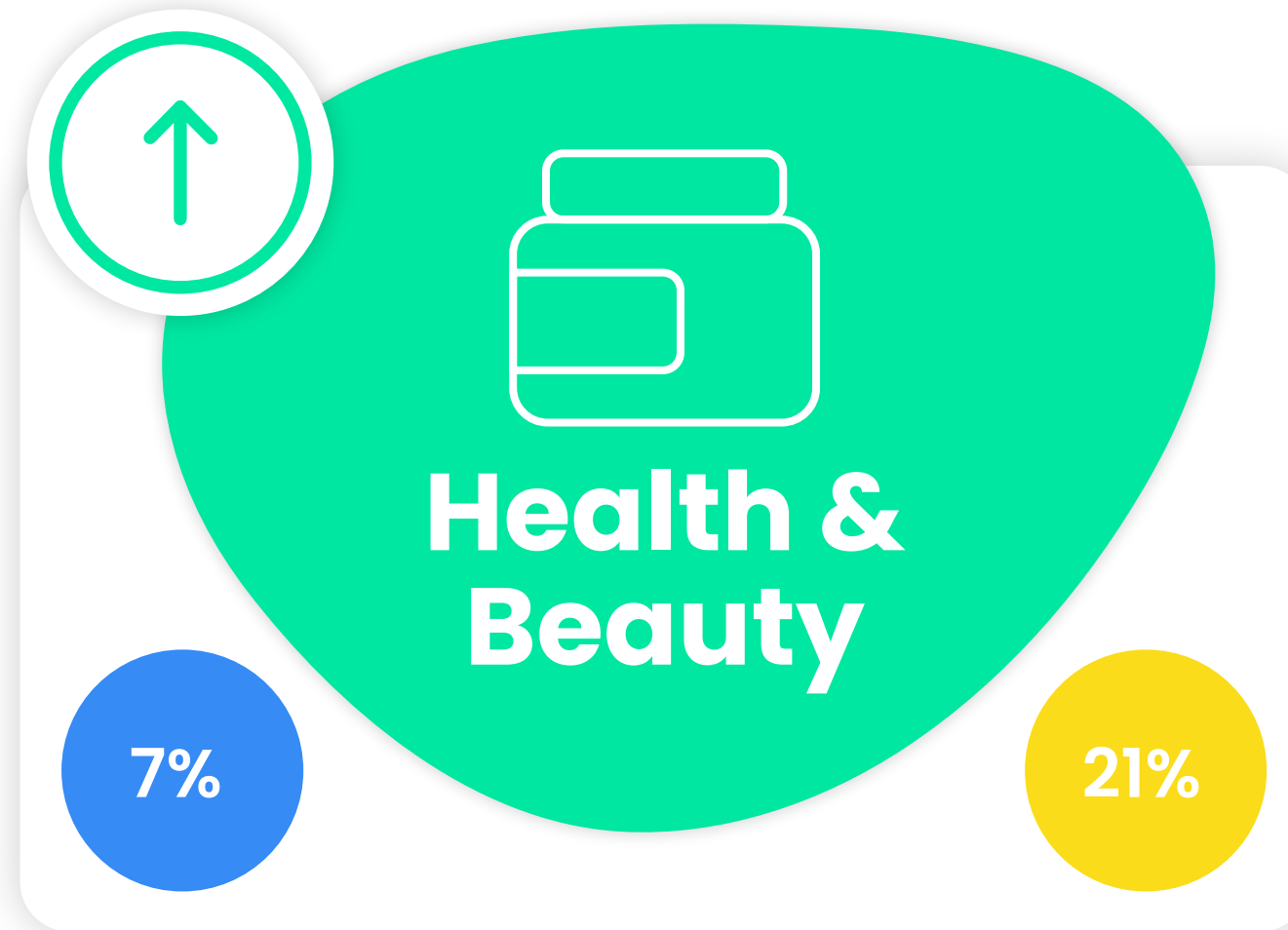
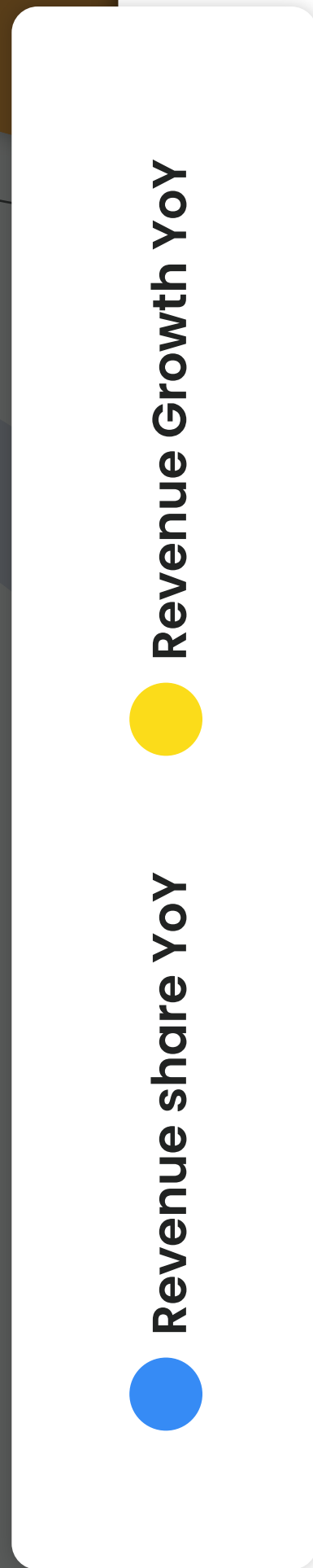
YoY revenue share and revenue growth rate by vertical

All data represents YoY growth for the end of June 2024



YoY revenue share and revenue growth rate by vertical

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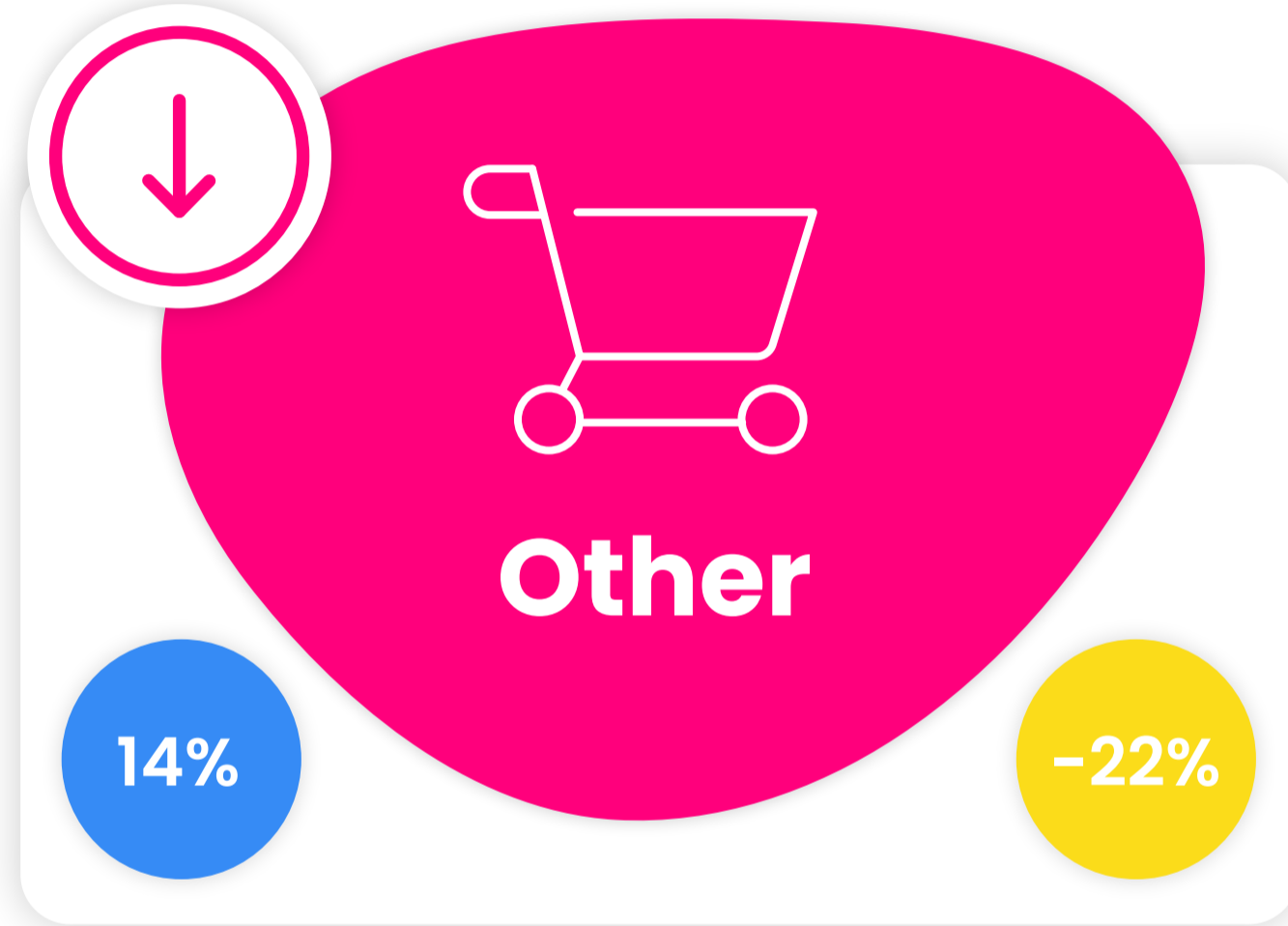


YoY revenue share and revenue growth rate by vertical

All data represents YoY growth for the end of June 2024

● 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