



Partnerize

U.S. Retail Affiliate Marketing Sales Index

Updated through March 31st, 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 March 2024

Accessories & Jewelry



+40% YoY

Home & Garden



+15% YoY

Other



+12% YoY

Sports & Fitness



+4% YoY

Food & Drink



-6% YoY

Health & Beauty



-19% YoY

Clothing & Apparel



-22% YoY

Gifts & Flowers



-24% YoY

Computers & Electronics



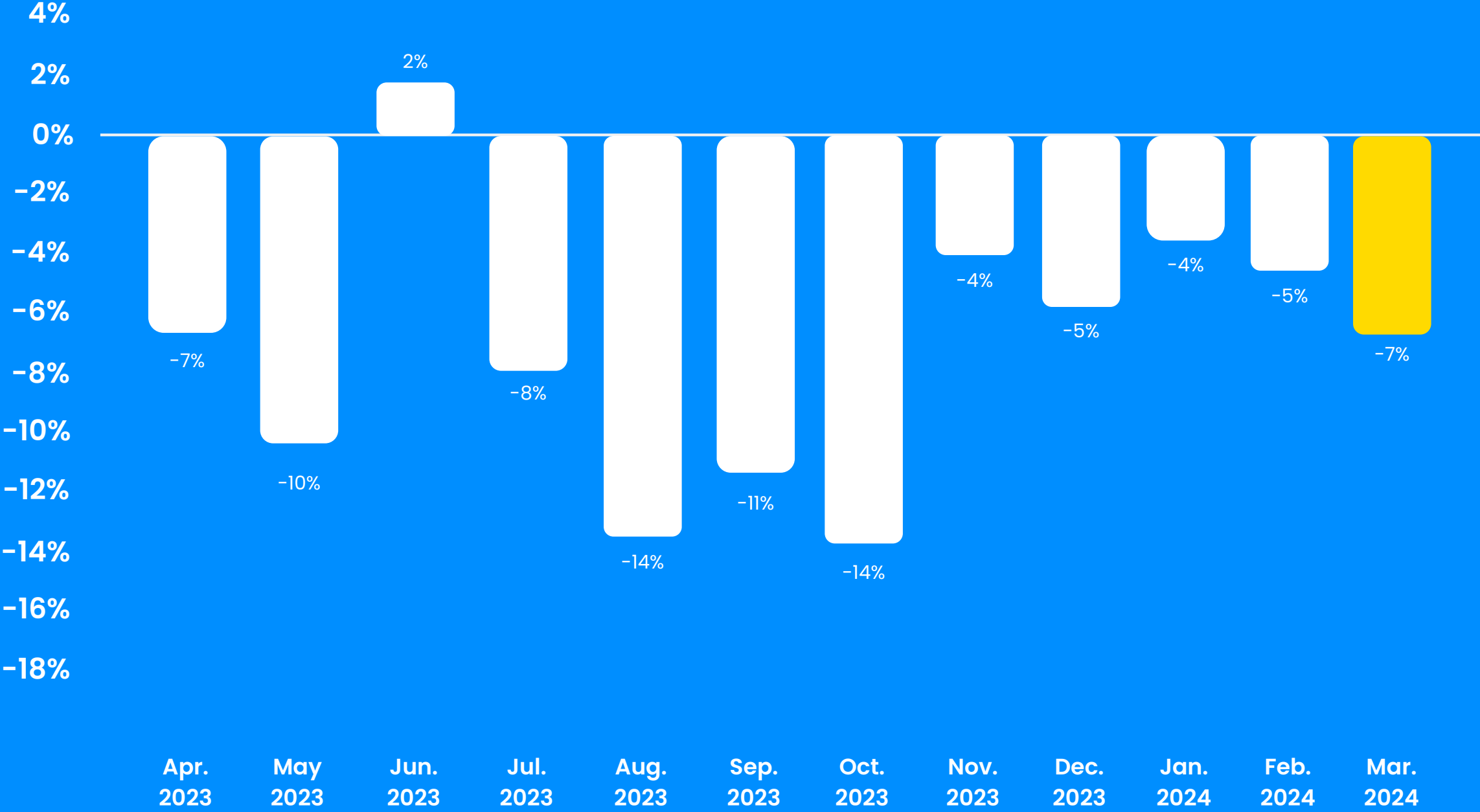
-49% YoY

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

4

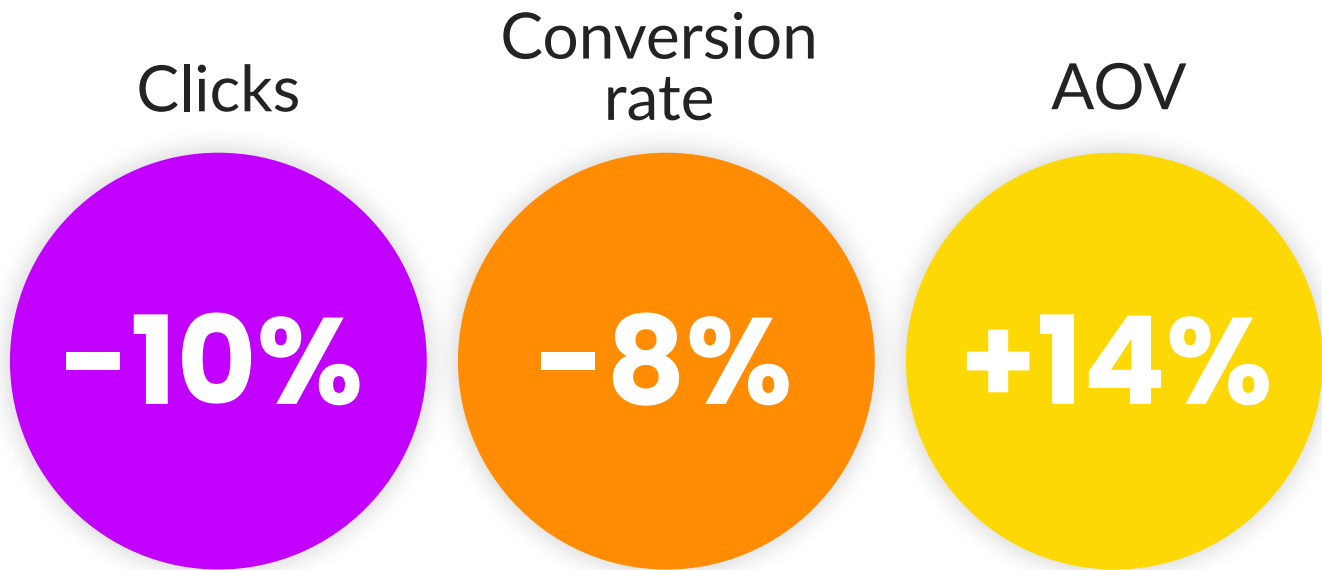
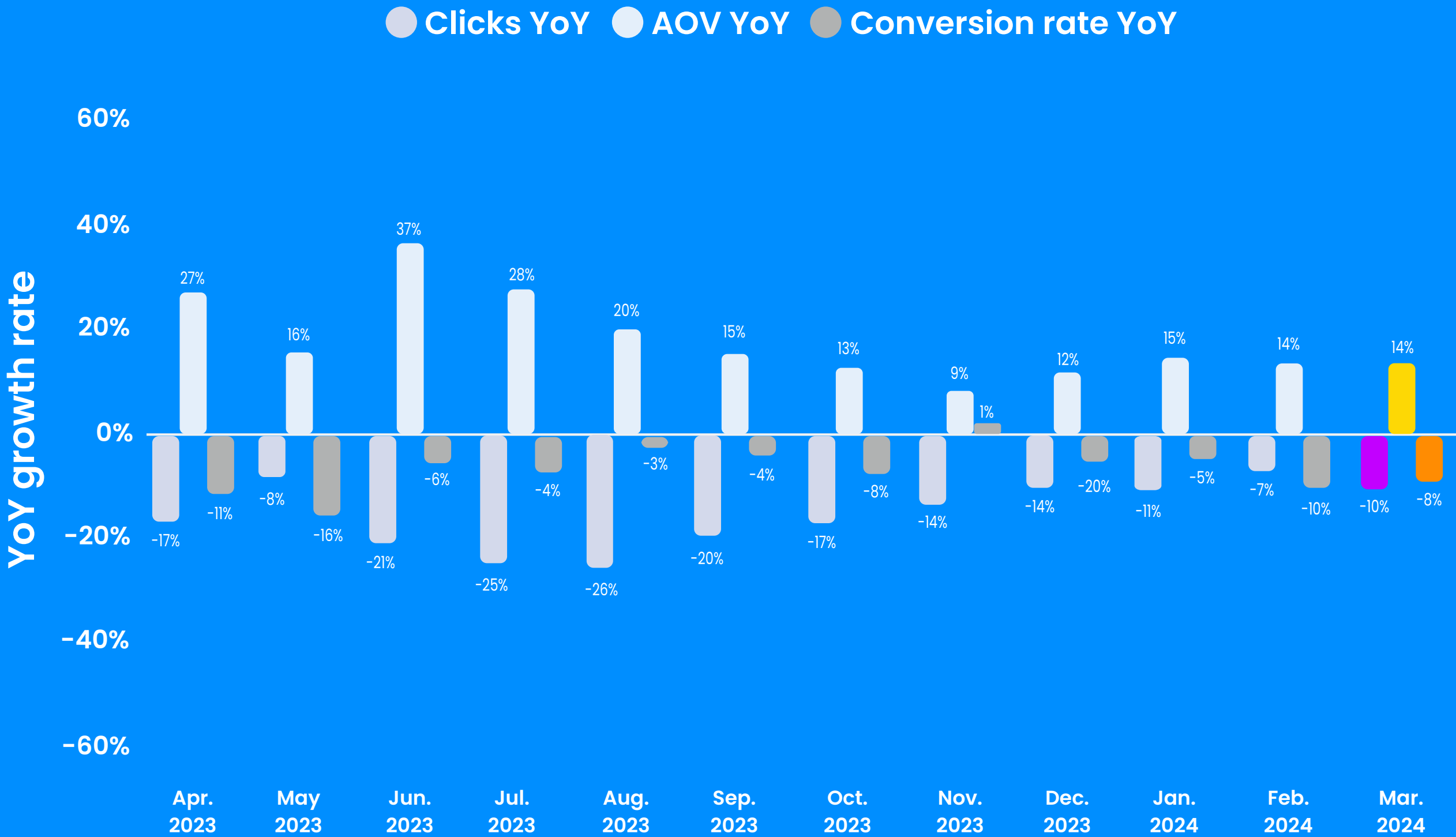
Gross Revenue YoY Growth



-7%

Gross Revenue decreased by 7% YoY in March 2024.

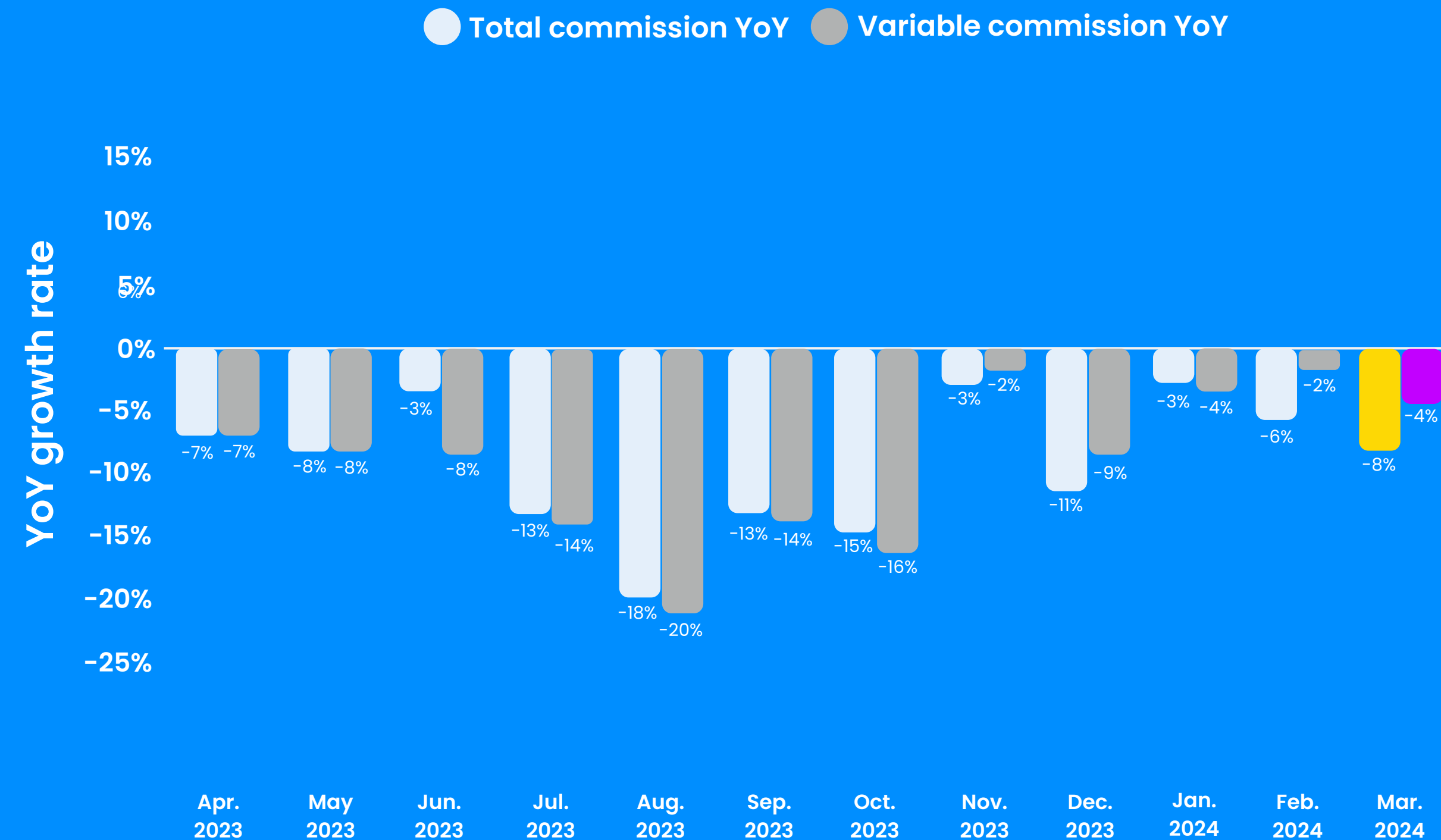
Drivers of monthly revenue growth



In March 2024, there was a decrease in revenue and it was made up by a 10% decrease in clicks, an 8% decrease in conversion rate, and a 14% increase in average order value.

Monthly commission trends

6



-8%

-4%

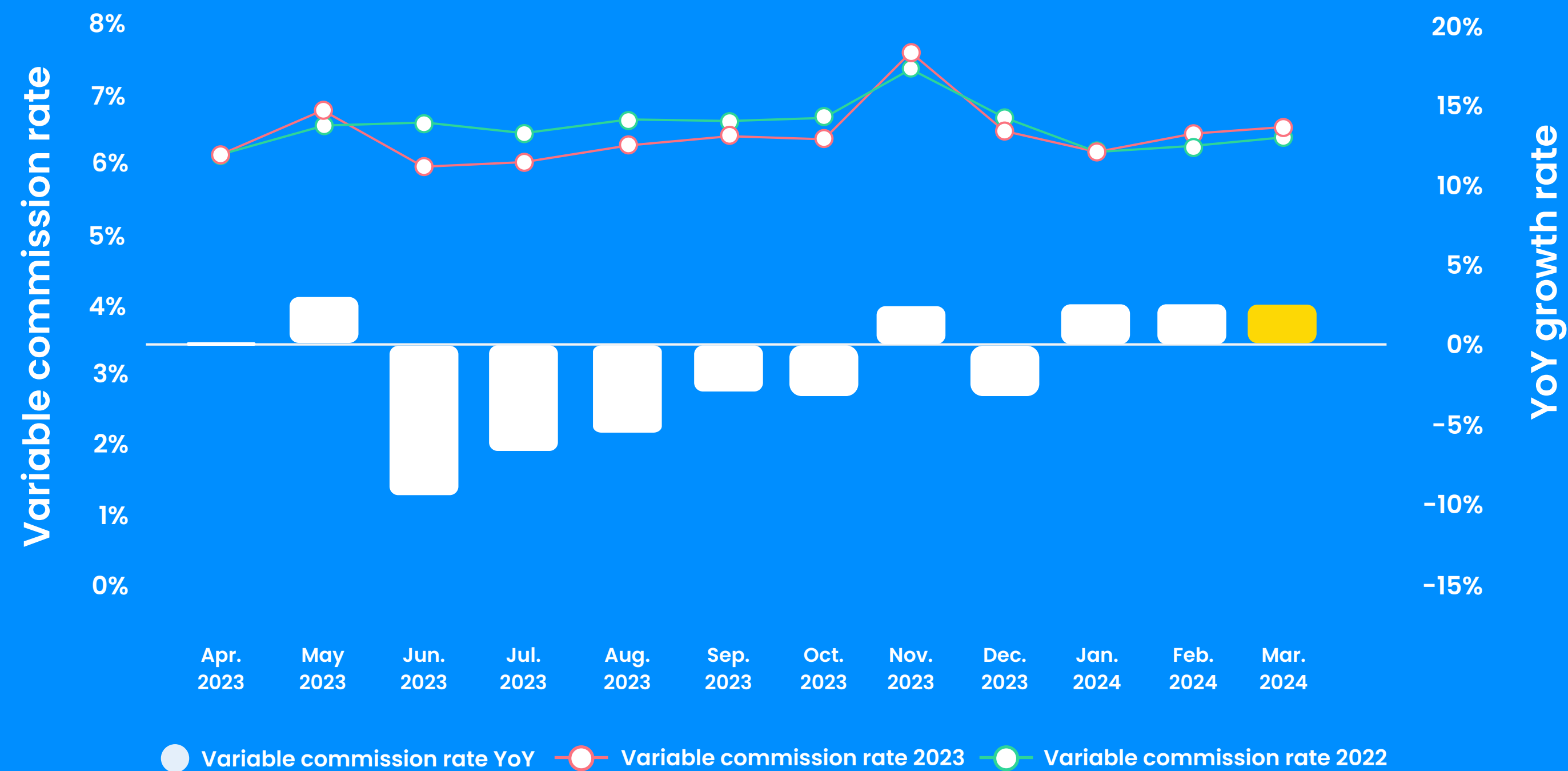
In March 2024, variable commission is down 4%, and total commission is down 8%.

- 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

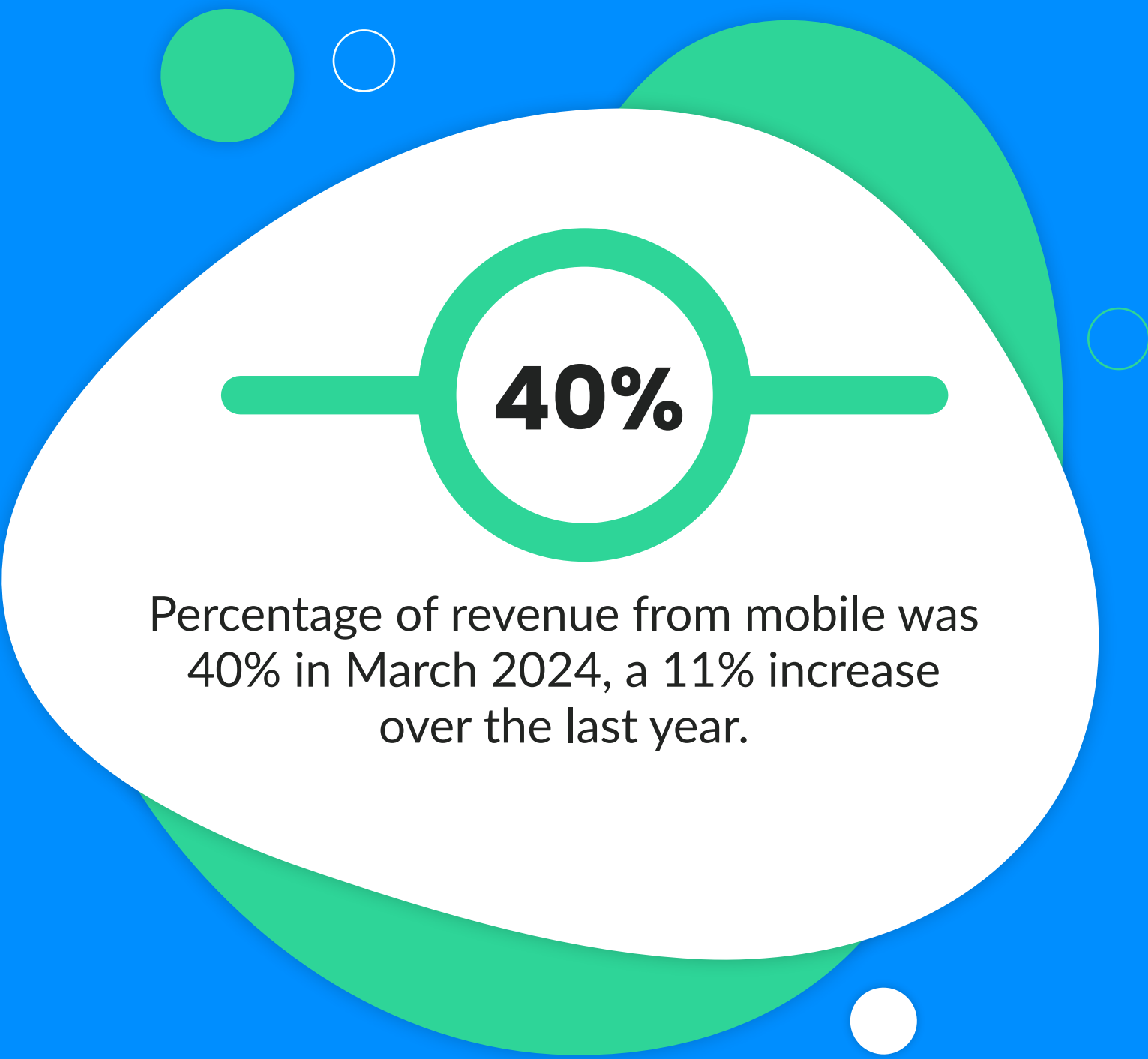
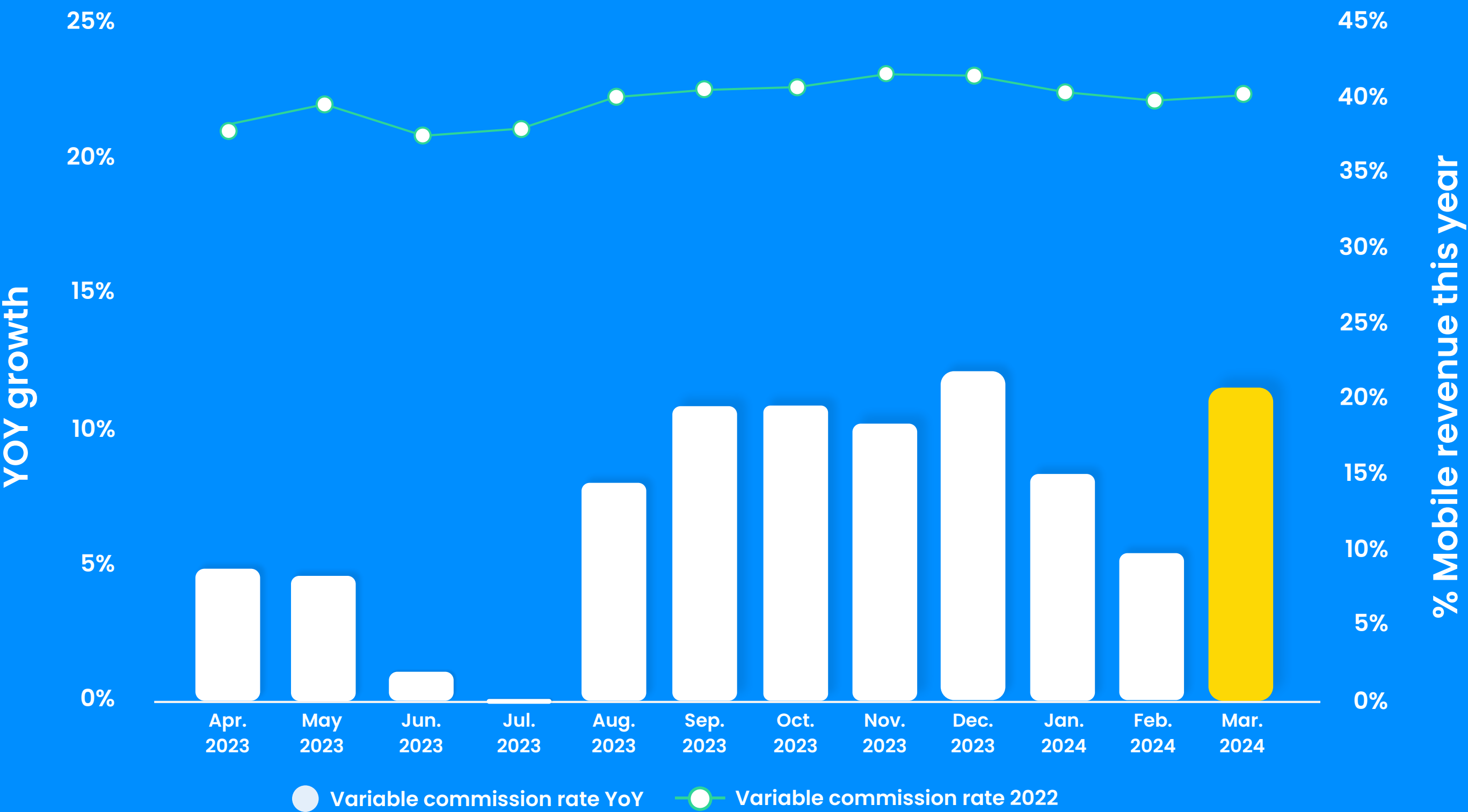


6.6%

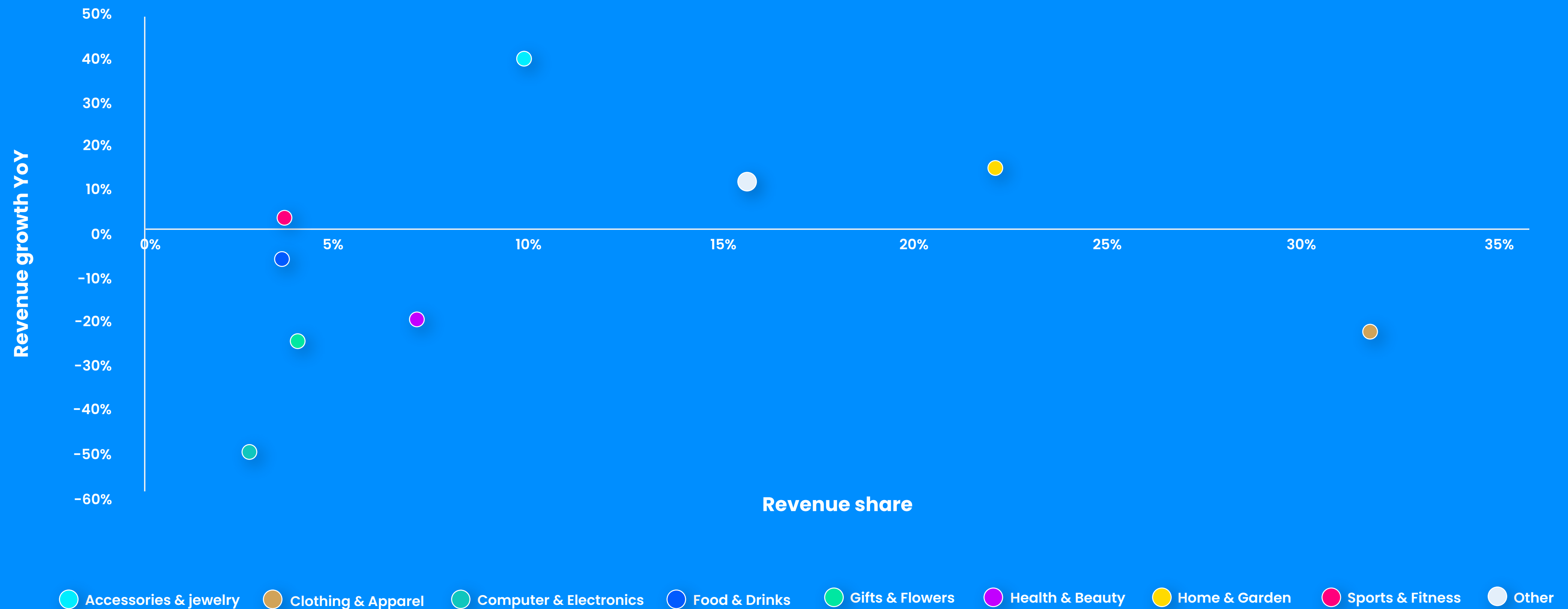
Variable commission rates in March 2024 were at 6.6%, around the norm for the past year, and 3% increase from March of 2023.

Monthly mobile revenue share

% of revenue from mobile



Revenue growth by advertiser vertical

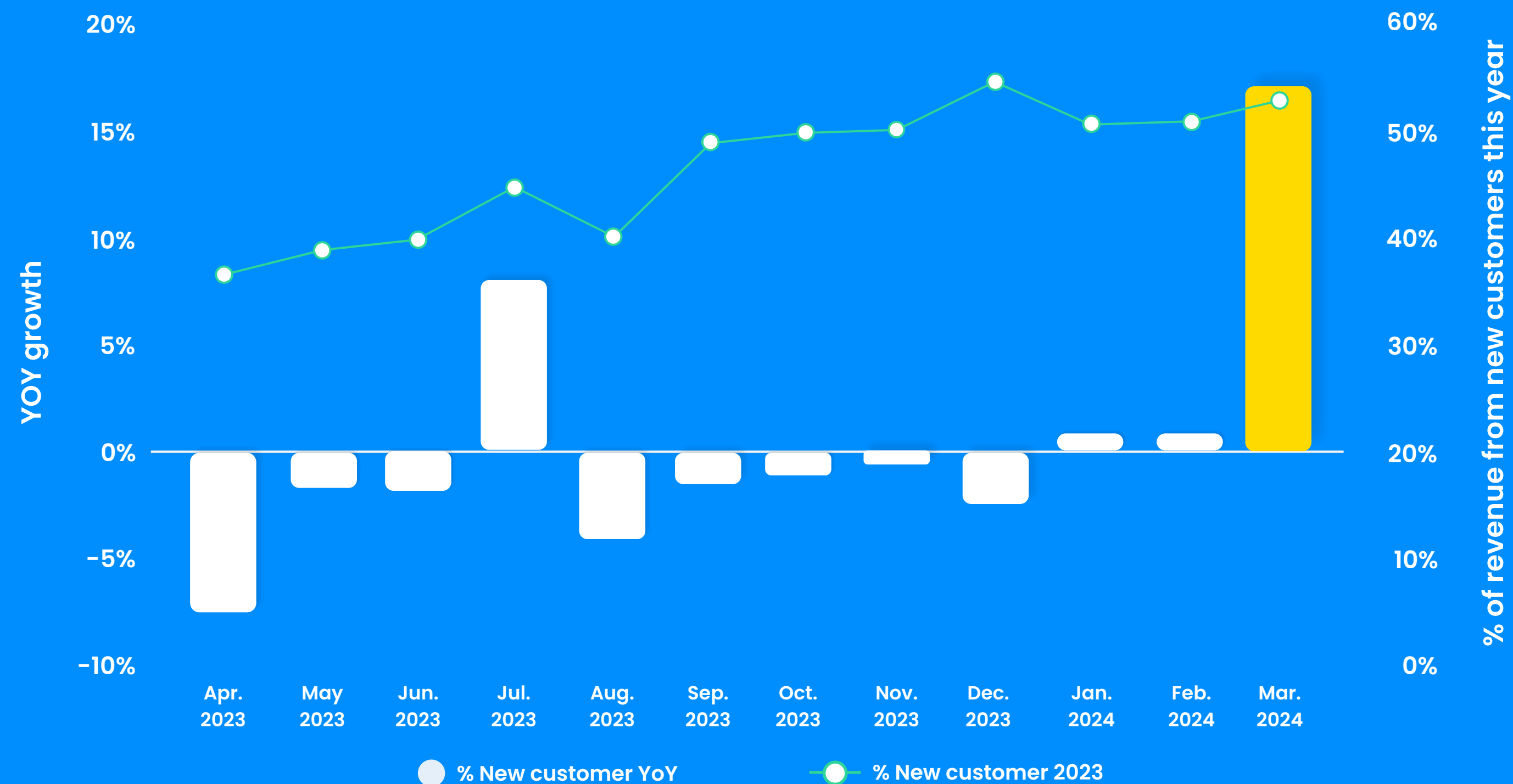


The "Other" category consists of the following verticals: Phonecard Services, Travel, Business, Art/Photo/Music, Shops/Malls, Books/Media, Family, Pets, Smoking & Tobacco, Education, Baby, Adult, Hunting & Firearms, Insurance, Automotive, Entertainment, Medical, Games & Toys, Commerce, Web Services,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

Monthly new customer revenue share

10

% of revenue from new customers



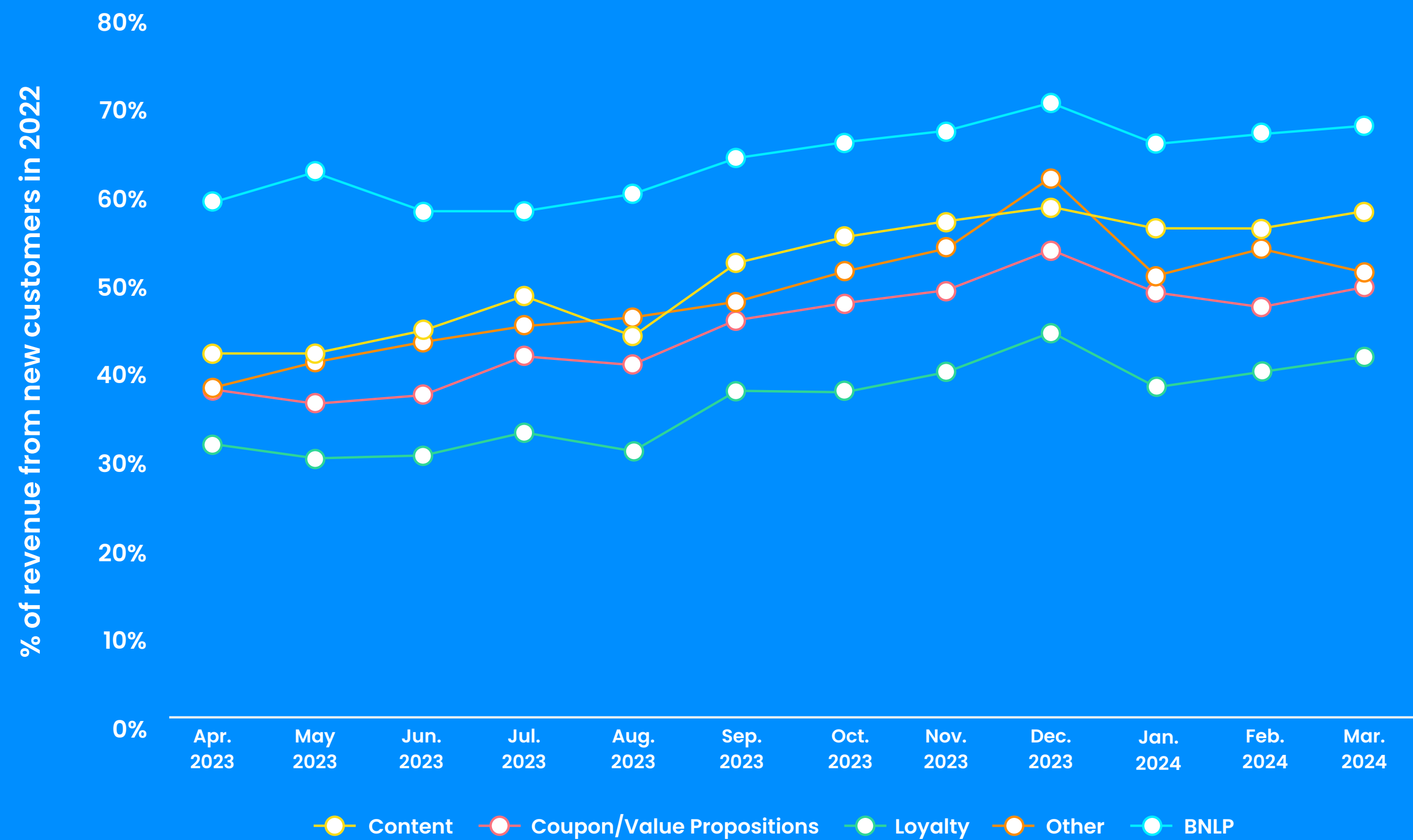
53%

In Mar 2024, the percentage of revenue acquired from new customers is 53%, a 17% YoY increase.

New customer revenue by publisher category

11

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



68.6%

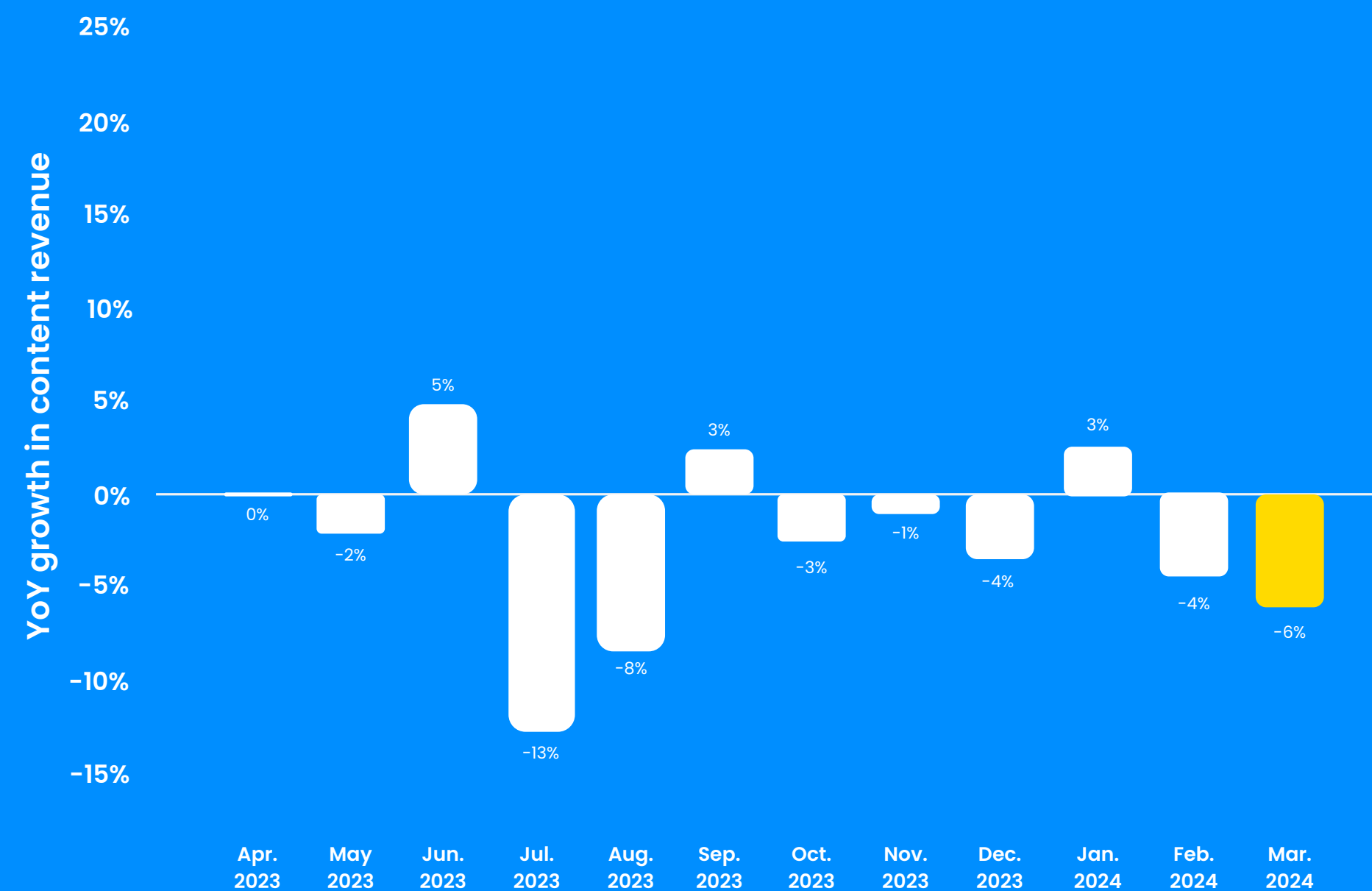
The March 2024, percentage of revenue from new customers by partner category:

Other 51.79% Content 59.04%
Coupon 50.56% Loyalty 42.42%
BNPL 68.59%

Content publisher YoY revenue and commission trends

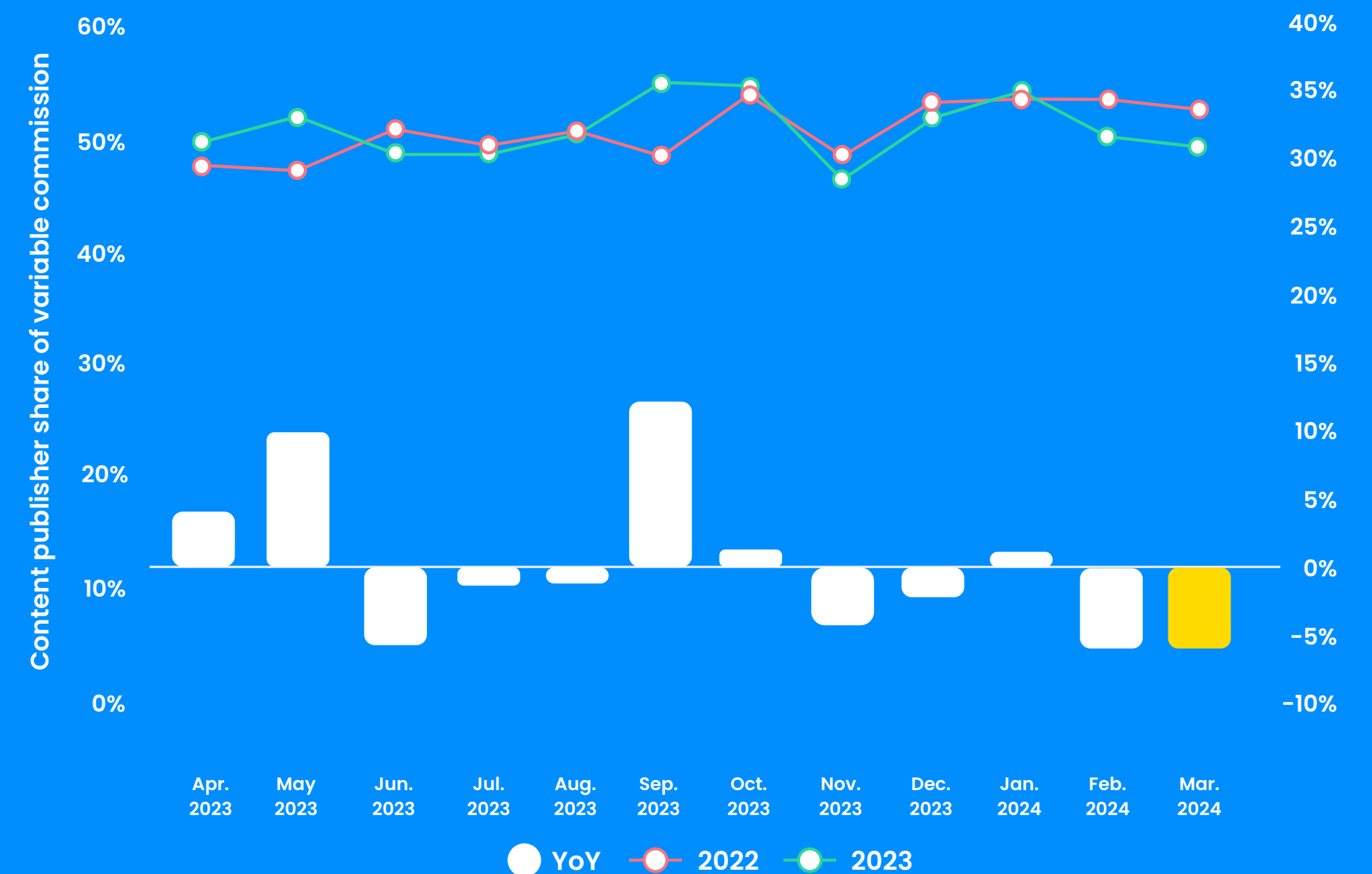
12

Content publisher revenue YoY growth rate



Growth in the content partner category has decreased by 6% in March 2024.

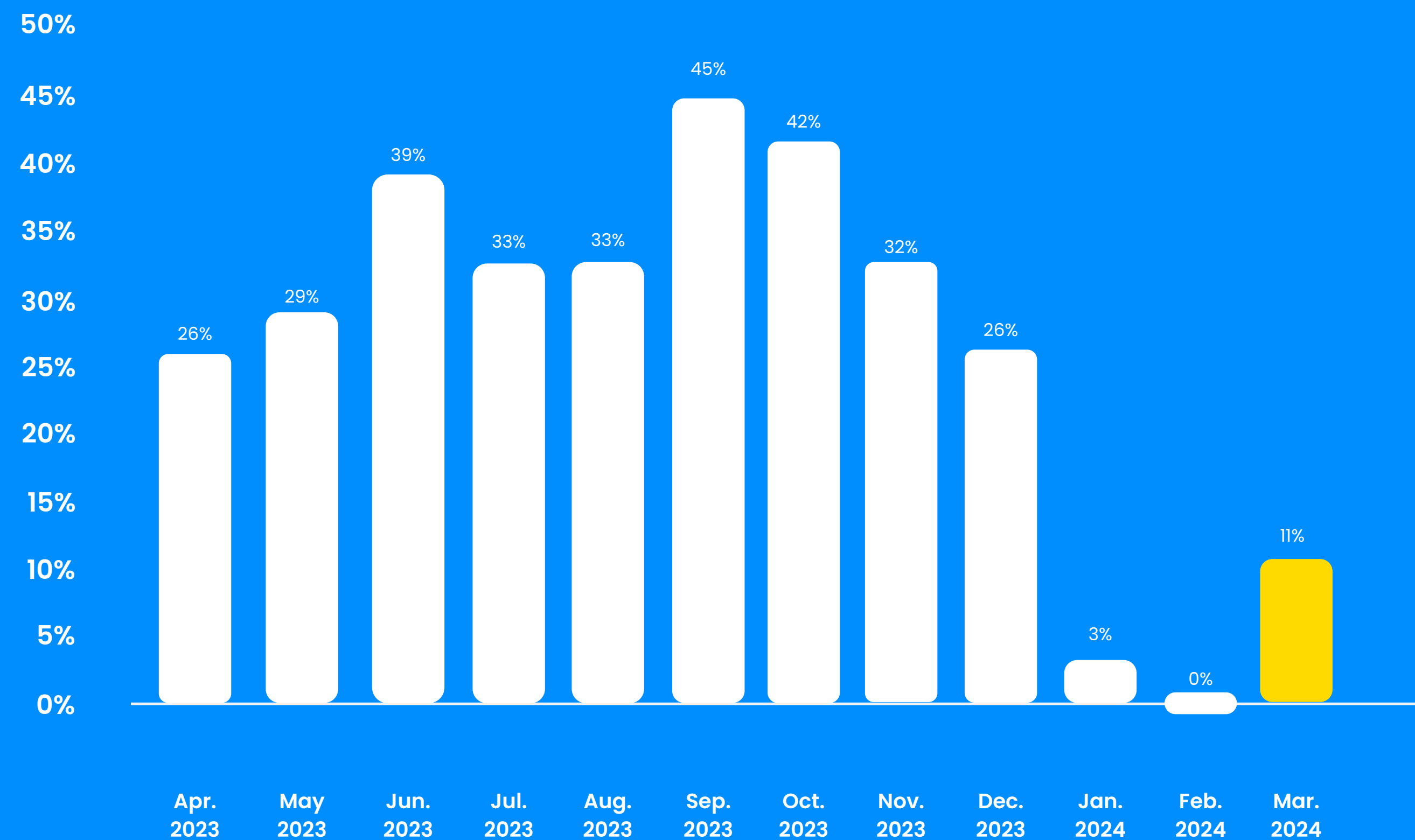
Content publisher share of variable commission



In February 2024, share of commission for content partners is 50%, down 6% YoY.

Publisher partner application growth YoY

13

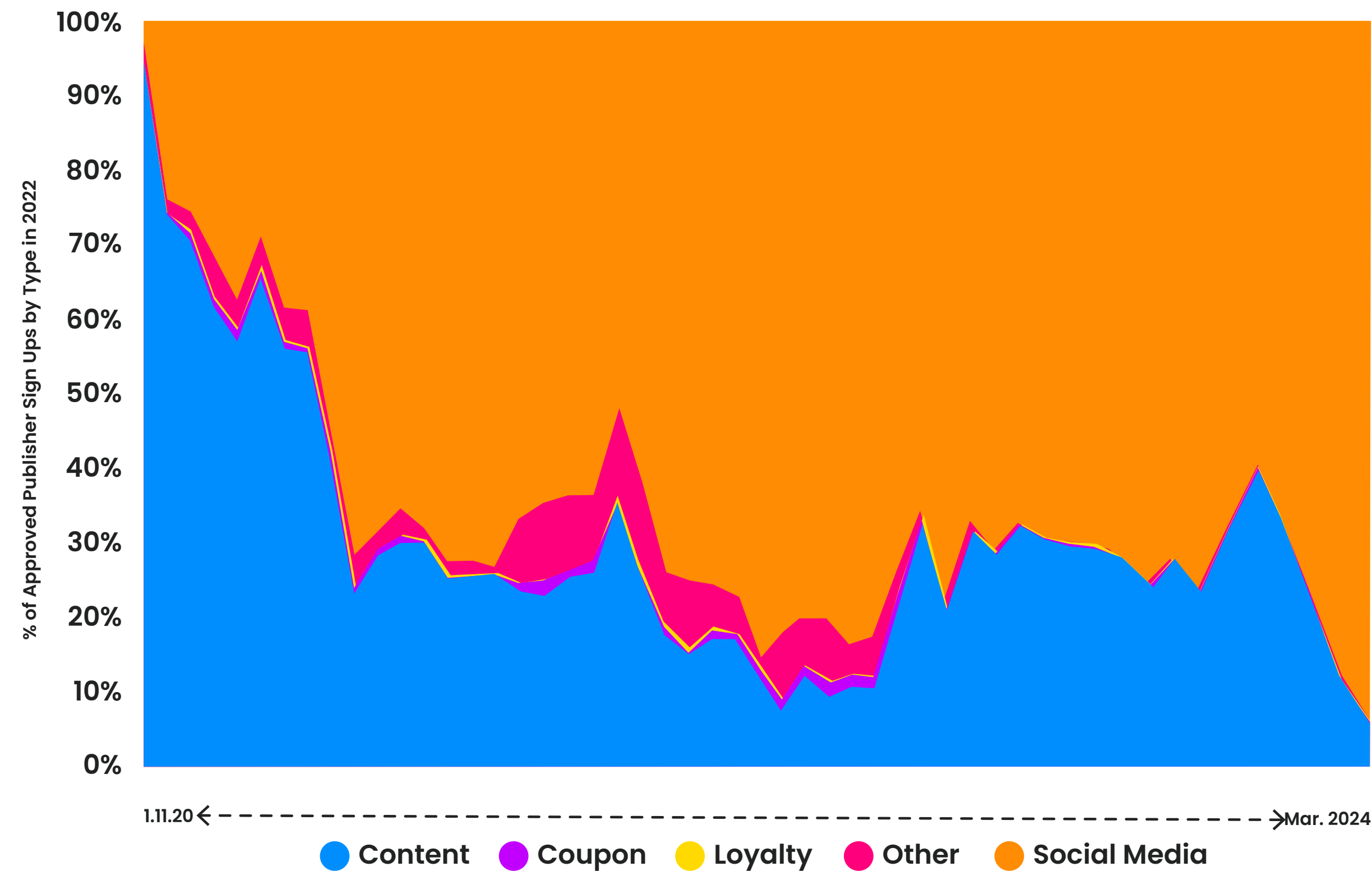


+11%

Partner applications saw an 11% increase YoY in March 2024, the highest it's been in this year.

% of approved publisher sign ups by type

14

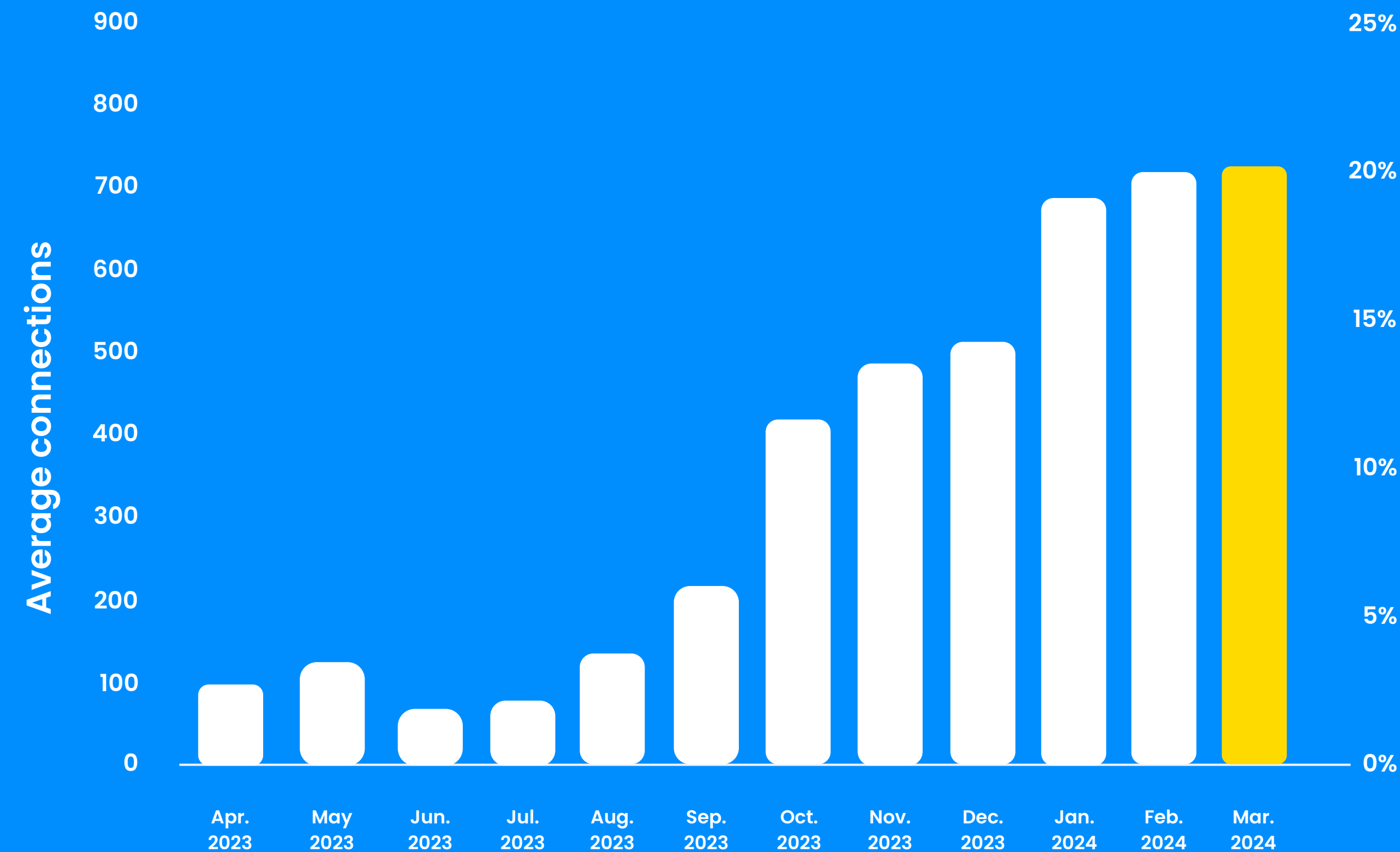


Social media and content partners make up the majority of new publishers joining the Ascend platform.

The trends have remained pretty consistent throughout the past year.

Advertiser-Partner connections

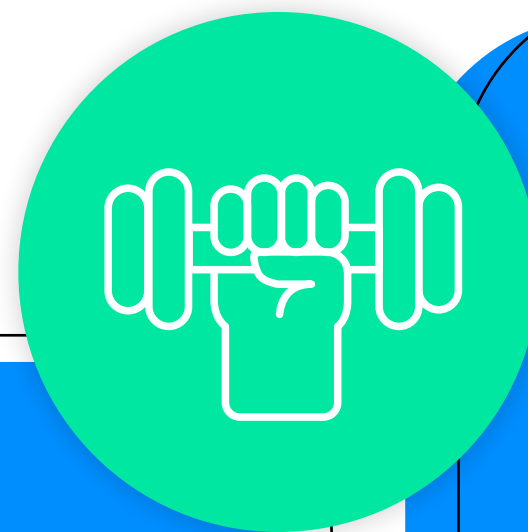
A connection between an advertiser and publisher is when the programs are joined.



20.2%

In the month of March, we saw a 20.2% increase YoY in the average number of connections per advertiser. The number of advertiser-publisher connections that are generating revenue in March 2024 is 21, up 1.6% YoY.

Insights by vertical.



YoY revenue share and revenue growth rate by vertical

17

All data represents YoY growth for the end of March 2024

Revenue Growth YoY



Revenue share YoY



YoY revenue share and revenue growth rate by vertical

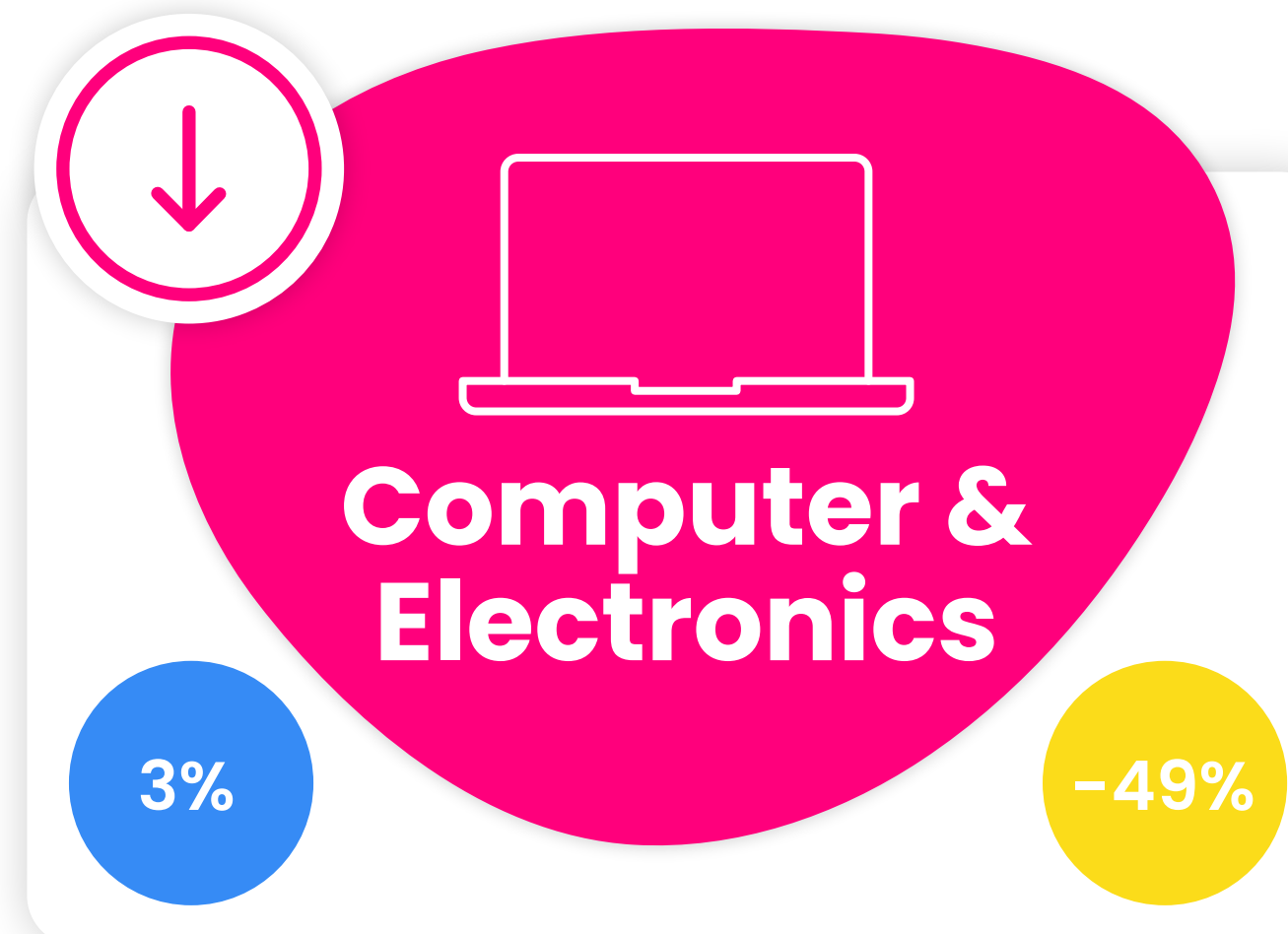
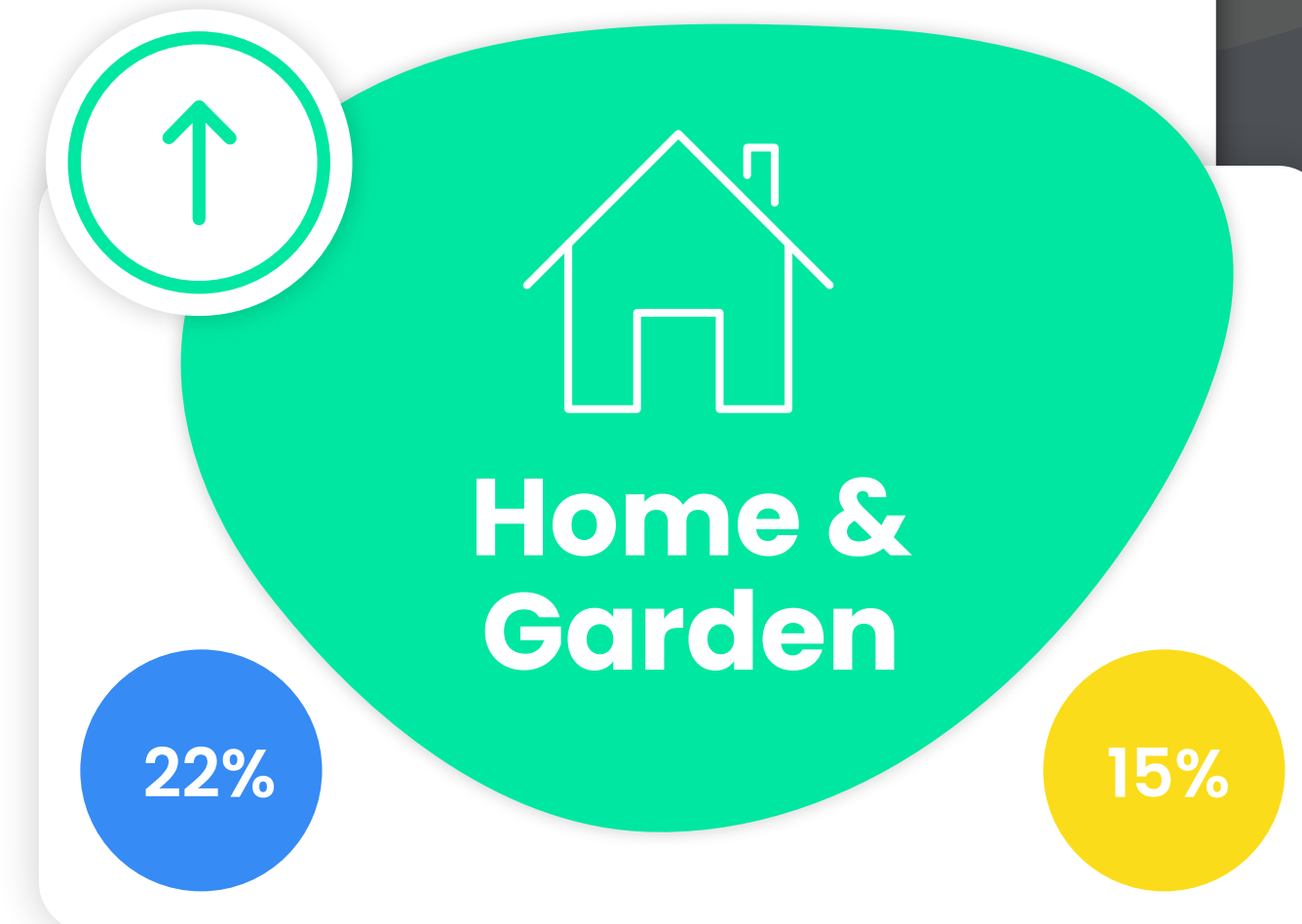
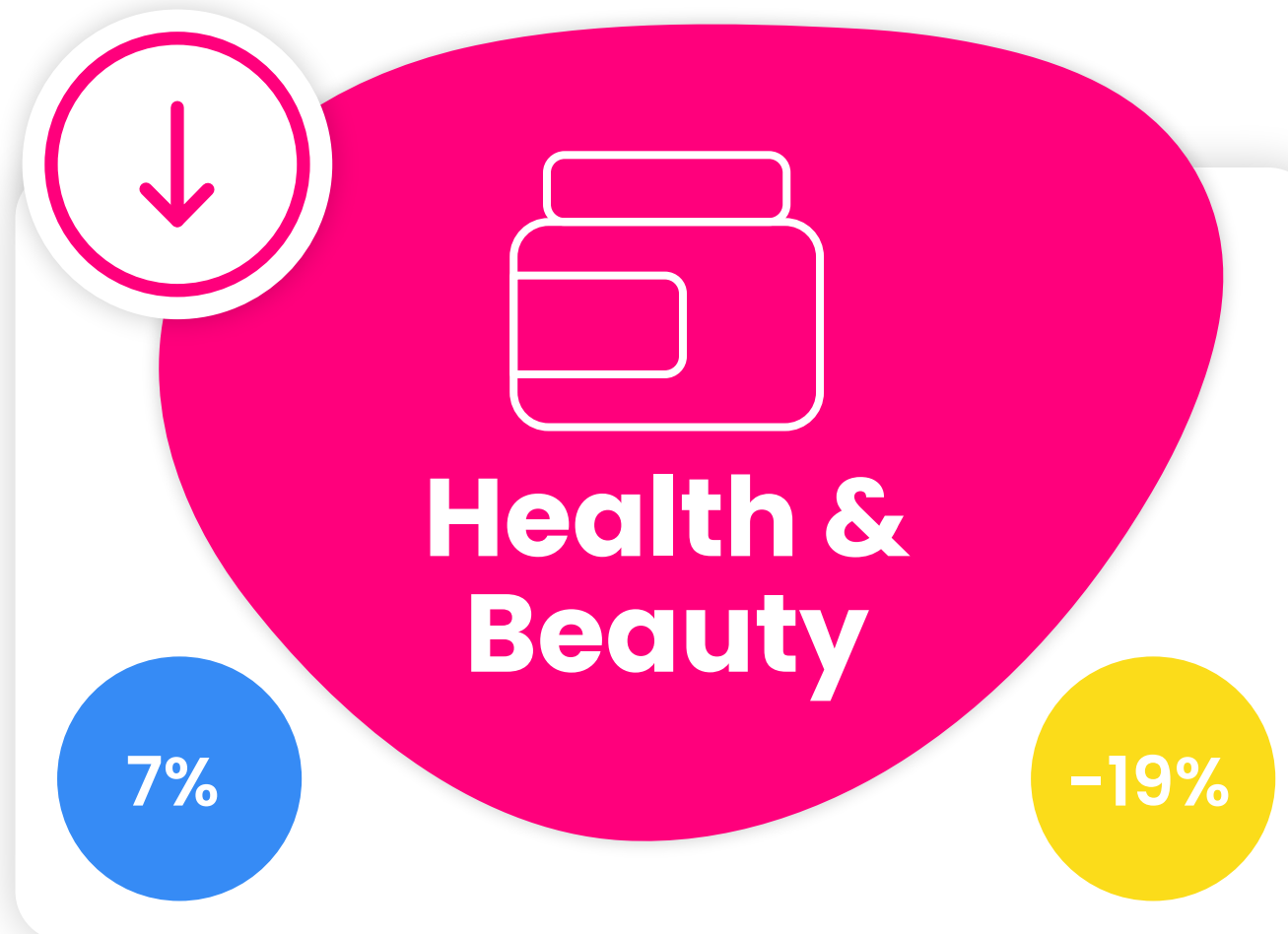
18

All data represents YoY growth for the end of March 2024

Revenue Growth YoY



Revenue share YoY

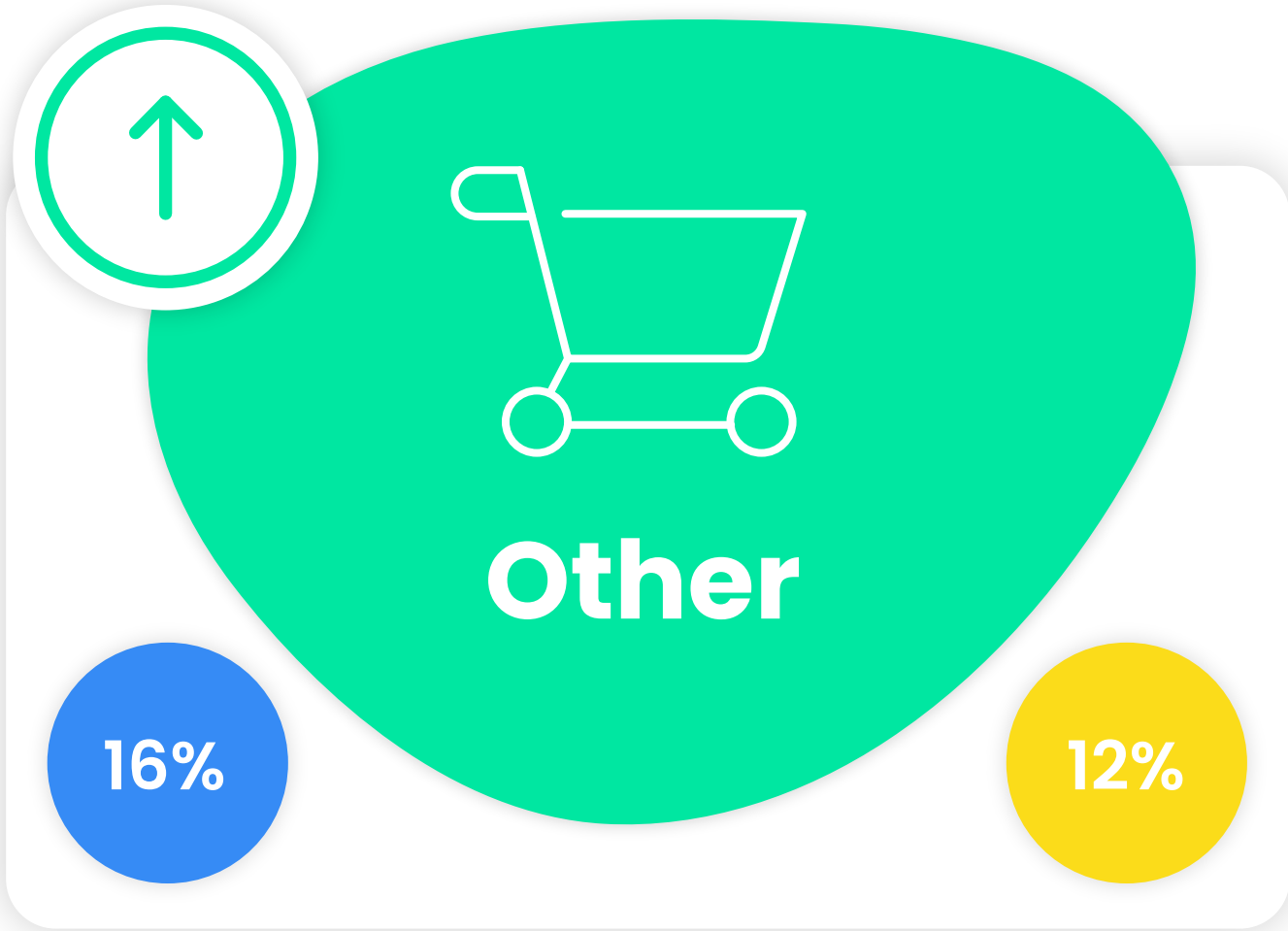


YoY revenue share and revenue growth rate by vertical

All data represents YoY growth for the end of March 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