



Partnerize

# U.S. Retail Affiliate Marketing Sales Index

Updated through September 30<sup>th</sup>, 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 1<sup>st</sup> through December 31<sup>st</sup> 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 September 2024

Accessories & Jewelry



+14% YoY

Food & Drink



+11% YoY

Health & Beauty



+11% YoY

Sports & Fitness



+5% YoY

Home & Garden



+1% YoY

Other



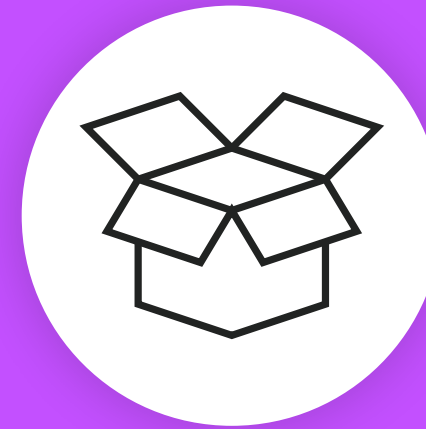
-9% YoY

Clothing & Apparel



-16% YoY

Gifts & Flowers



-16% YoY

Computers & Electronics

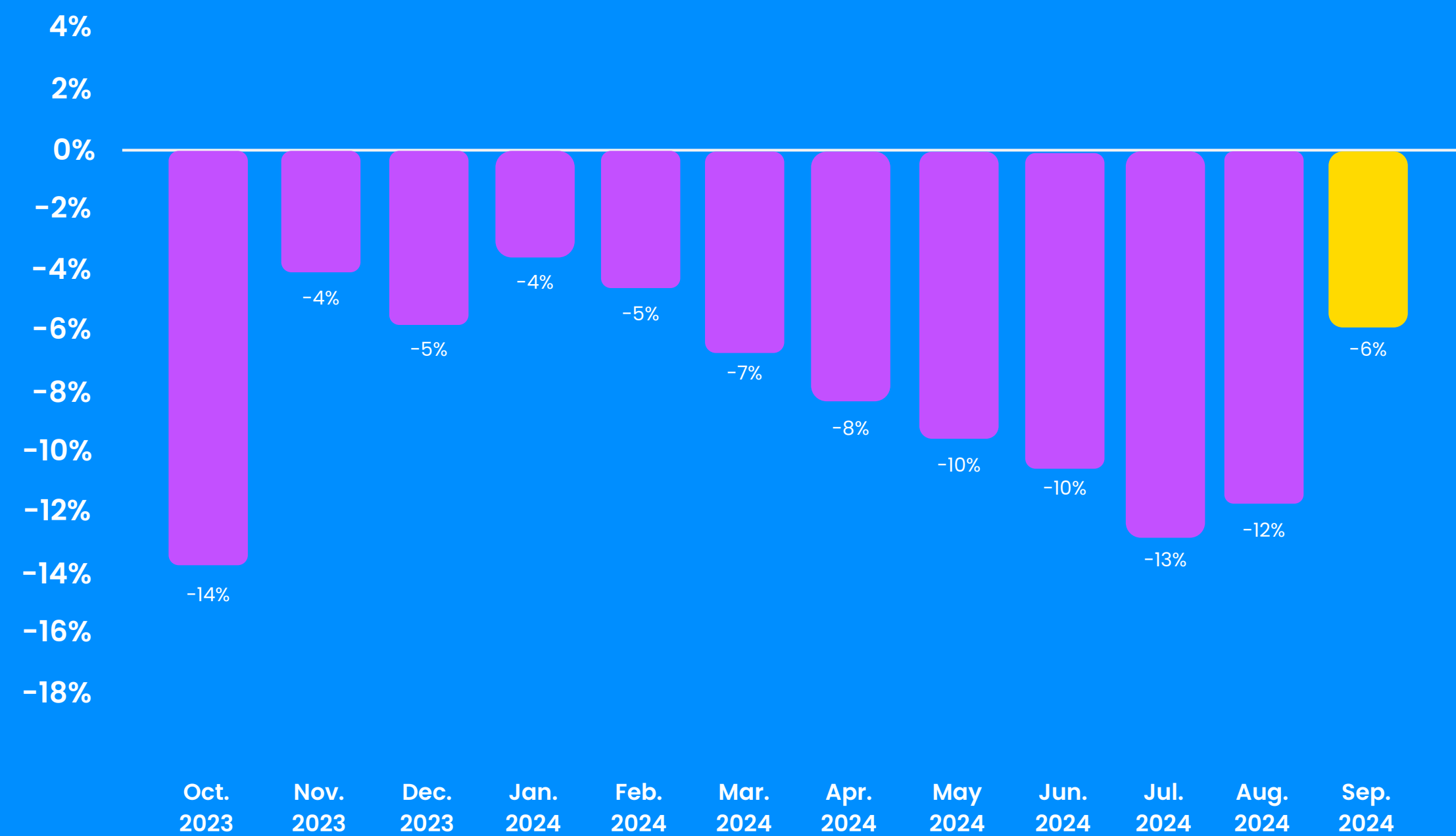


-36% YoY

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

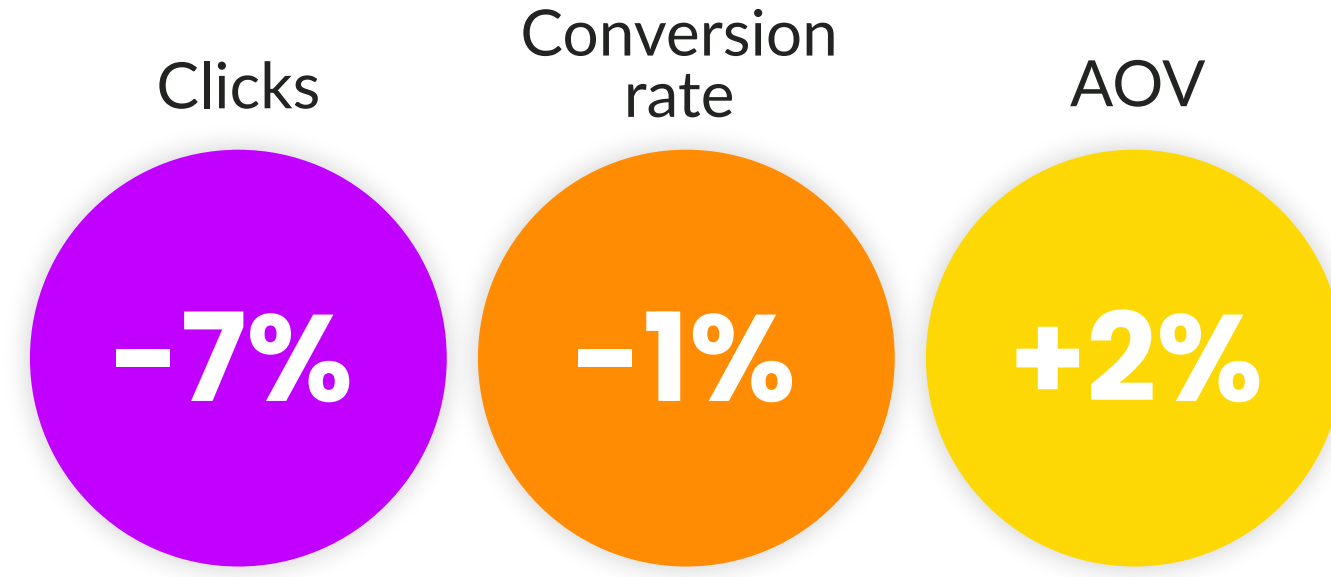
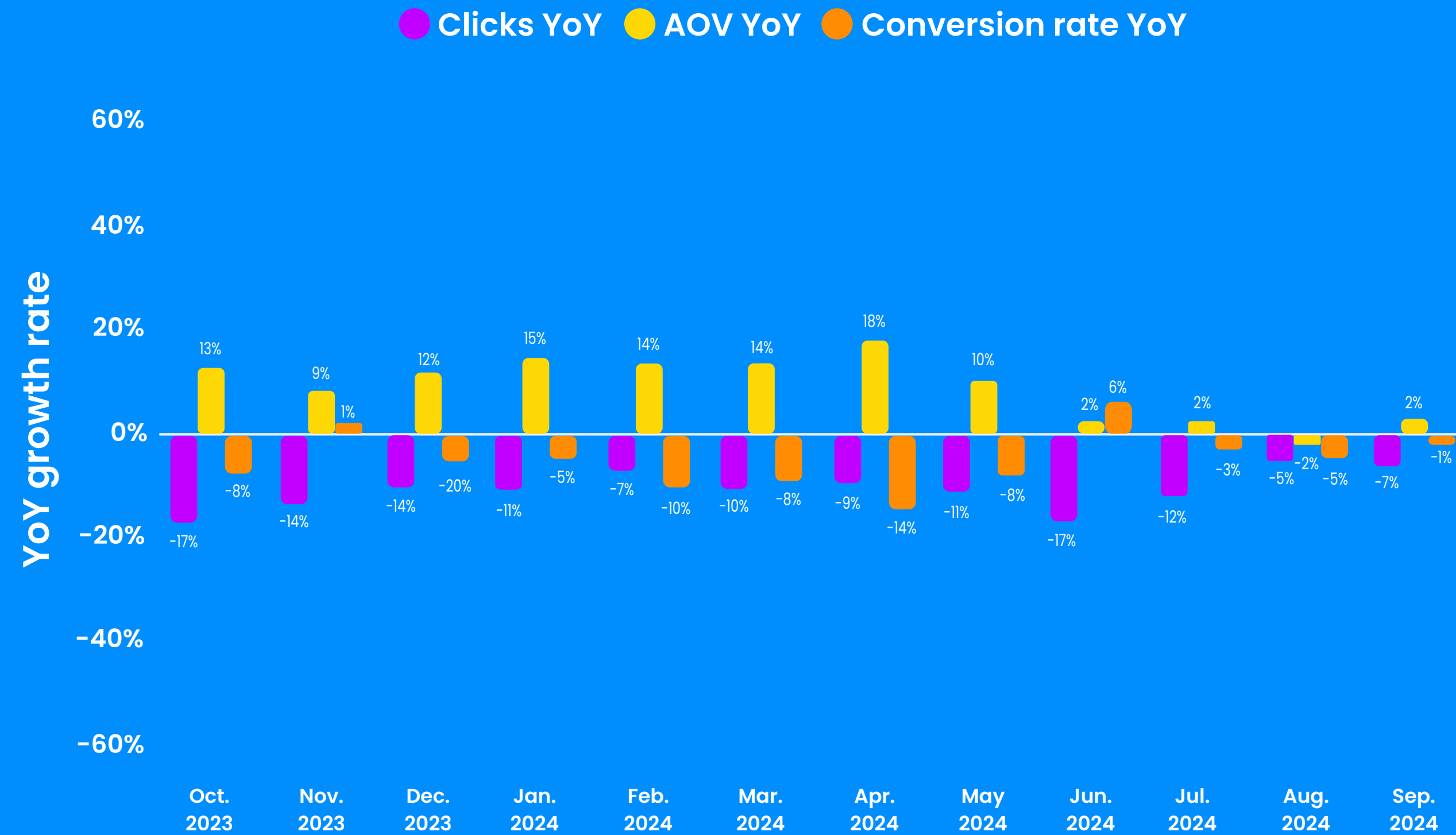


**-6%**

Gross revenue decreased by 6% in September 2024.

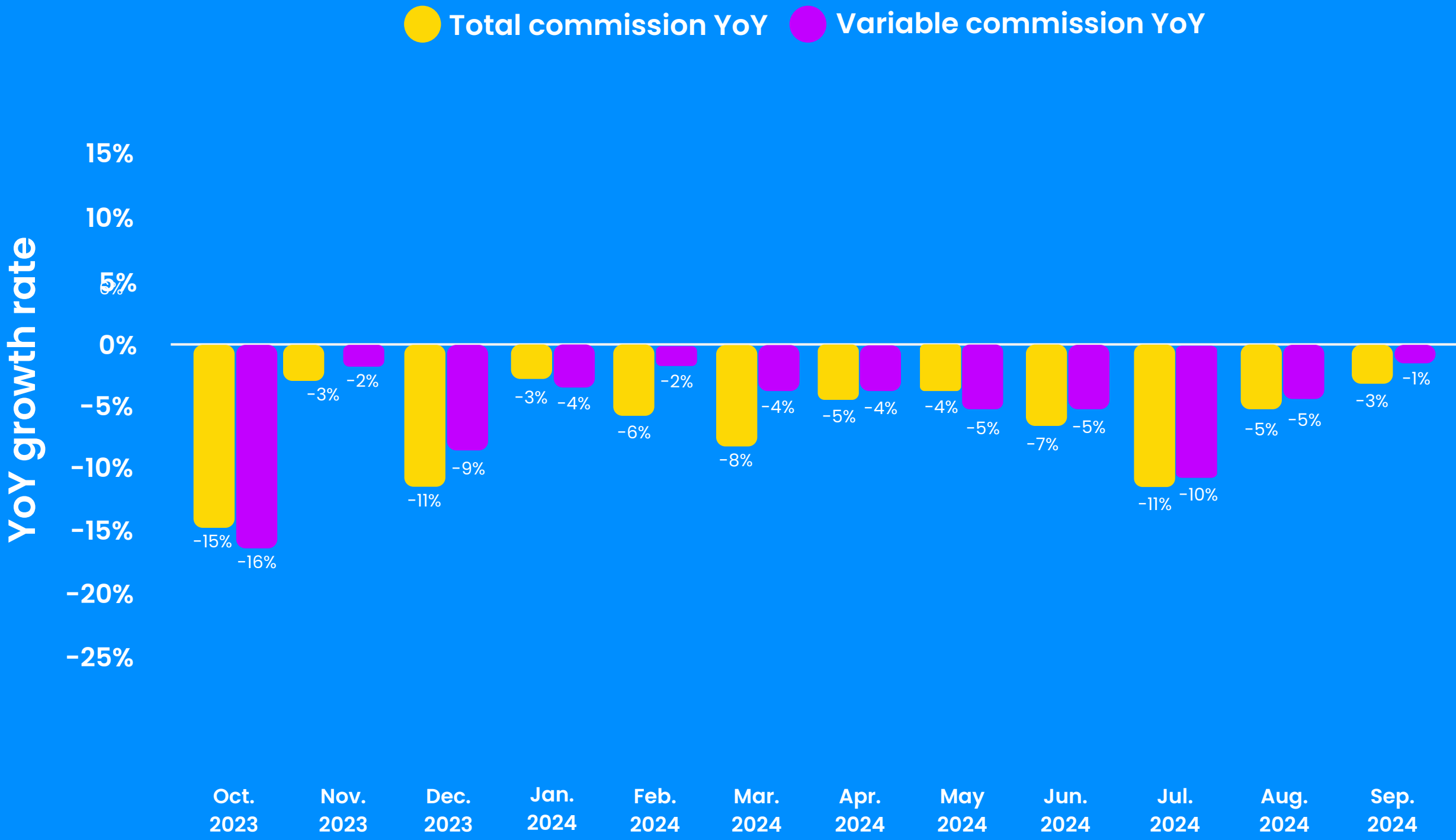


# Drivers of monthly revenue growth



In September 2024, there was a decrease in revenue and it was made up by a decrease in clicks (7%), a decrease in conversion rate (1%) and an increase in average order value (2%).

# Monthly commission trends



**-3%**

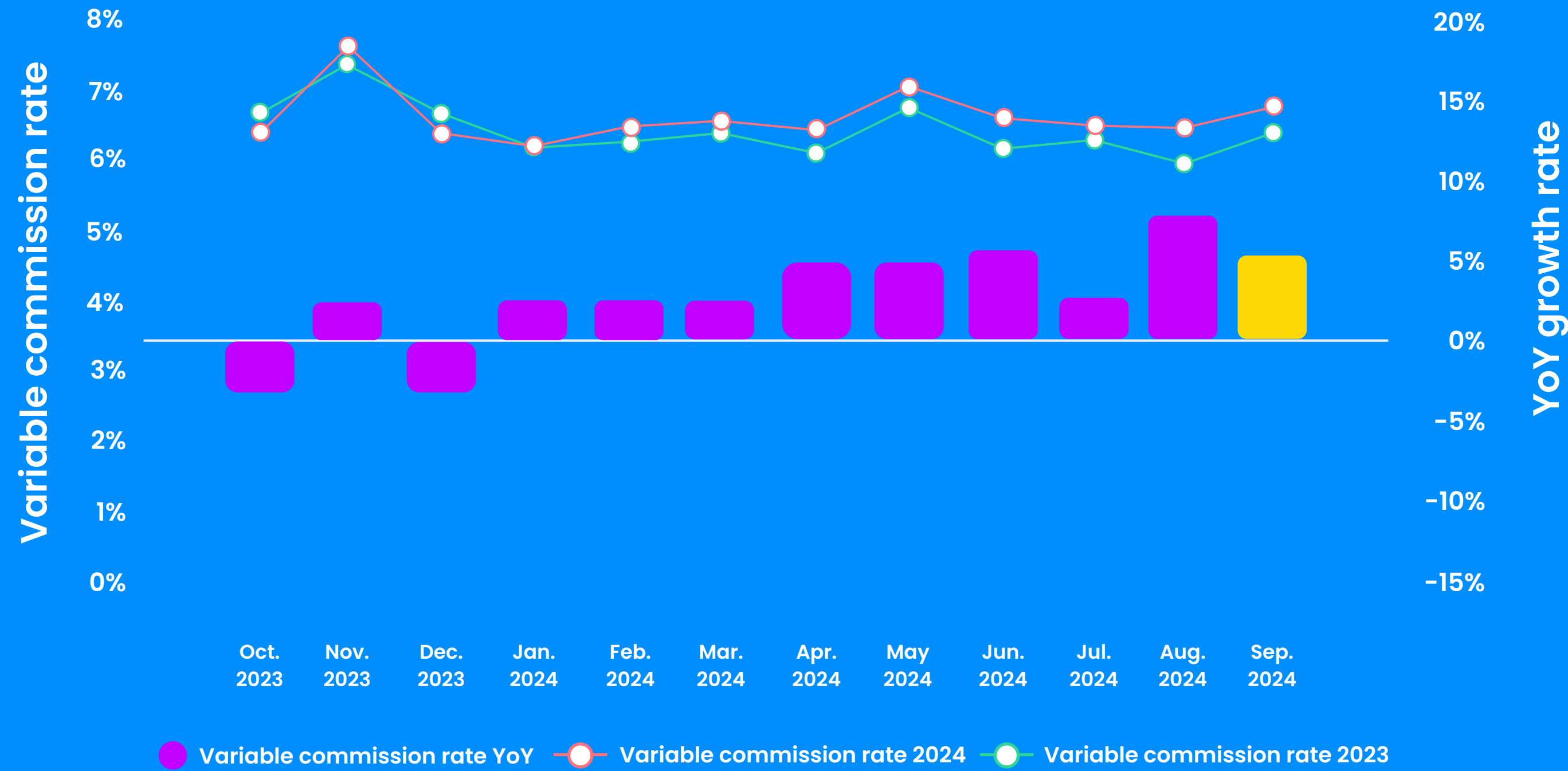
**-1%**

In September 2024 variable commission is down 1%, and total commission is down 3%.

- 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

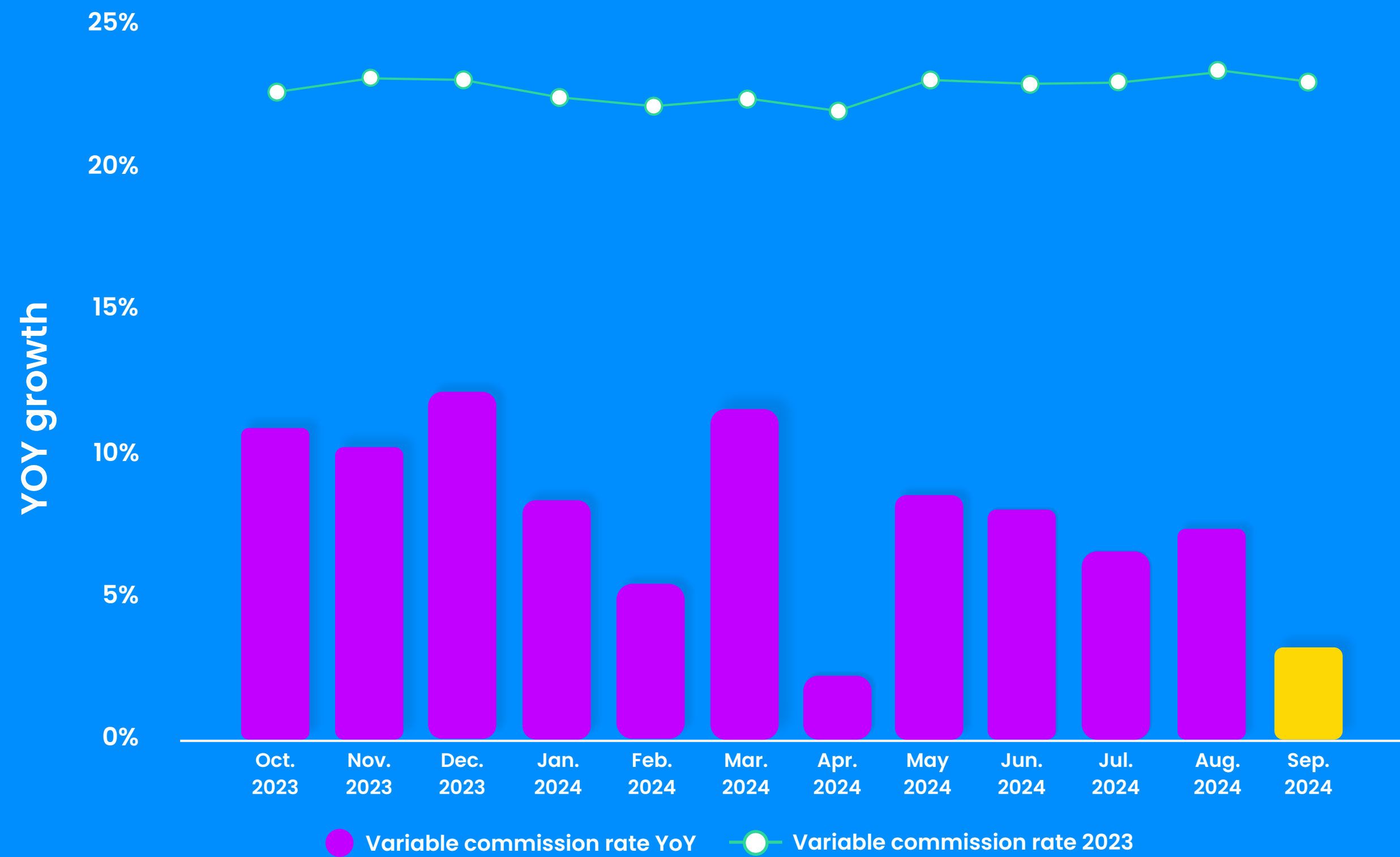


**6.8%**

Variable commission rates in September 2024 were at 6.8%, and a 6% increase from September of 2023.

# Monthly mobile revenue share

### % of revenue from mobile



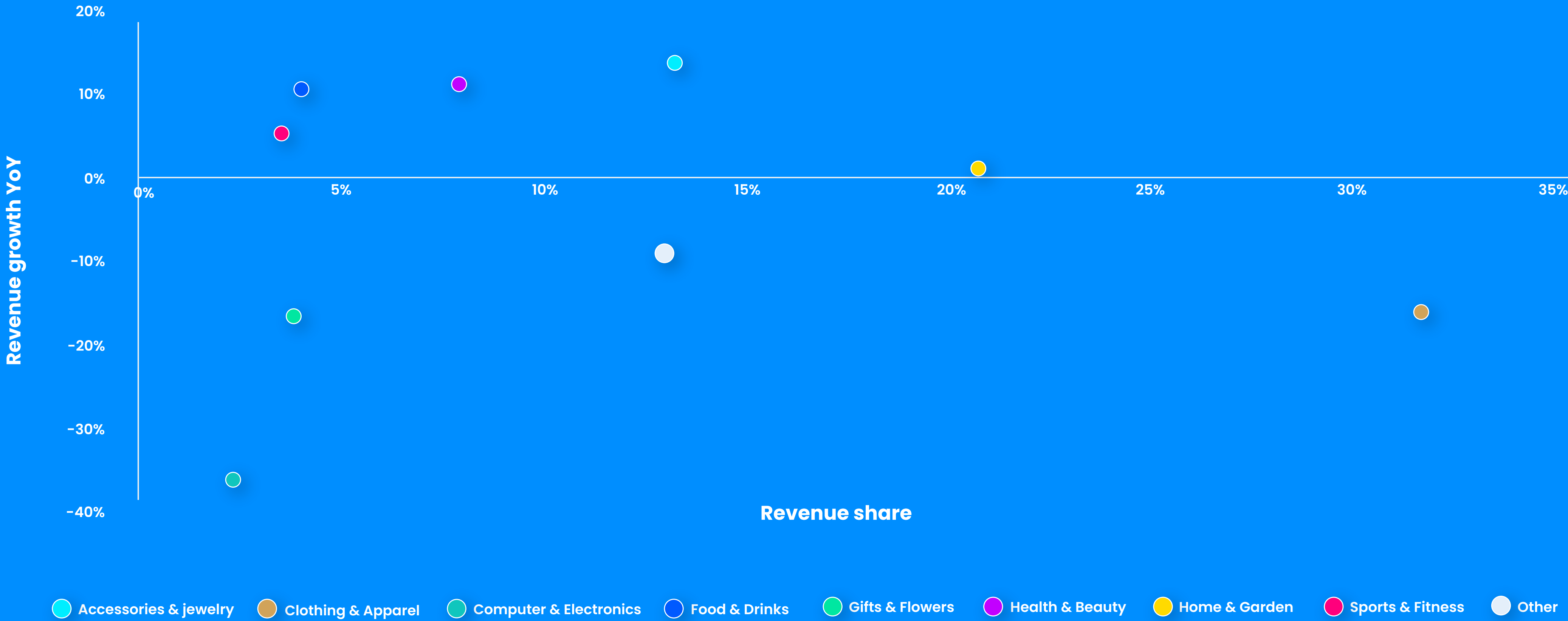
45%  
40%  
35%  
30%  
25%  
20%  
15%  
10%  
5%  
0%

% Mobile revenue this year

**41%**

Percentage of revenue from mobile was 41% in September 2024, a 3% 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



**48%**

In September 2024, the percentage of revenue acquired from new customers is 48%, and a 1% YoY decrease.

# New customer revenue by publisher category

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



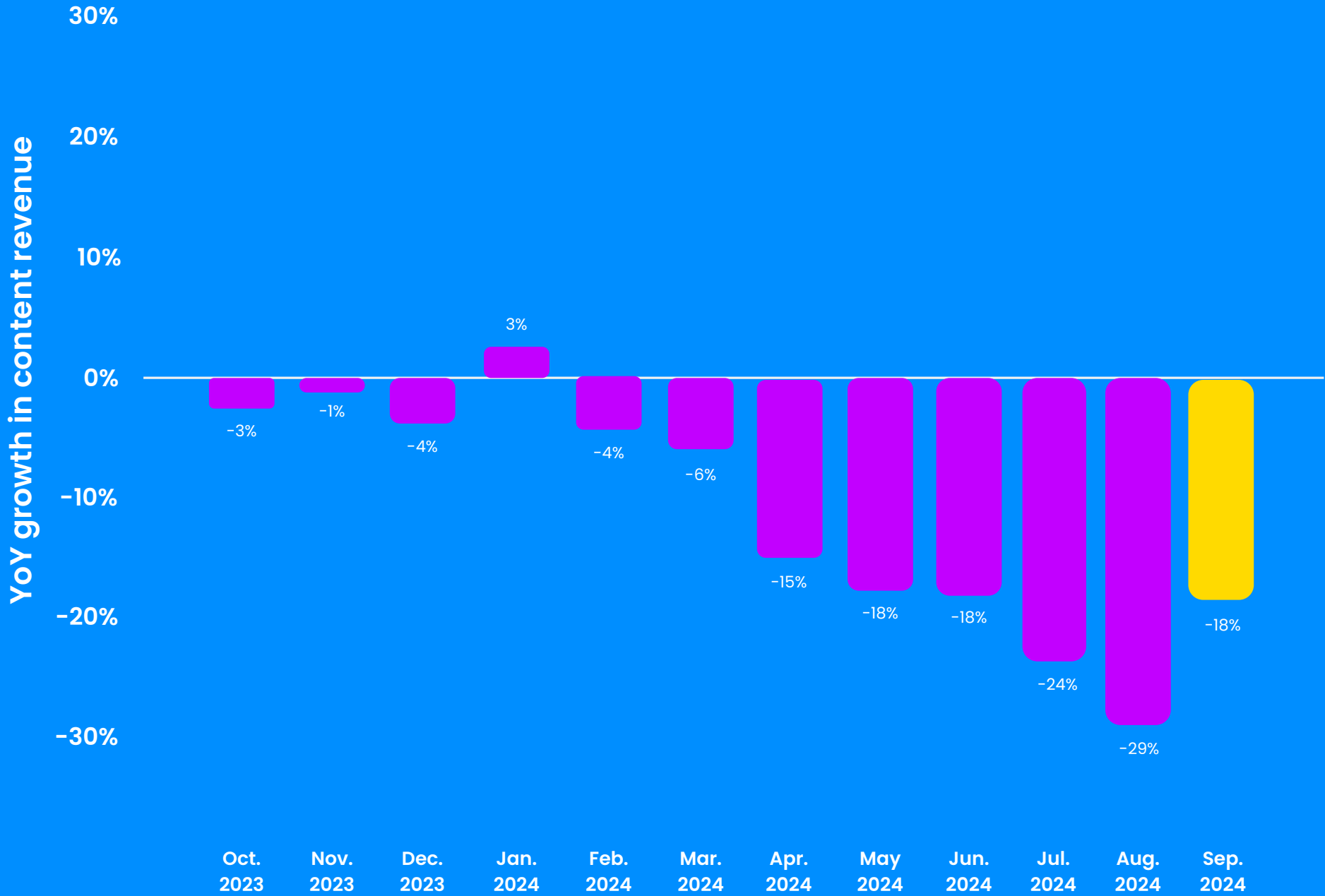
**61.16%**

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

- Content-Influencer: 57.72%
- Other: 60.20%
- Coupon: 45.11%
- Content: 55.45%
- Loyalty: 40.19%
- BNPL: 61.16%**

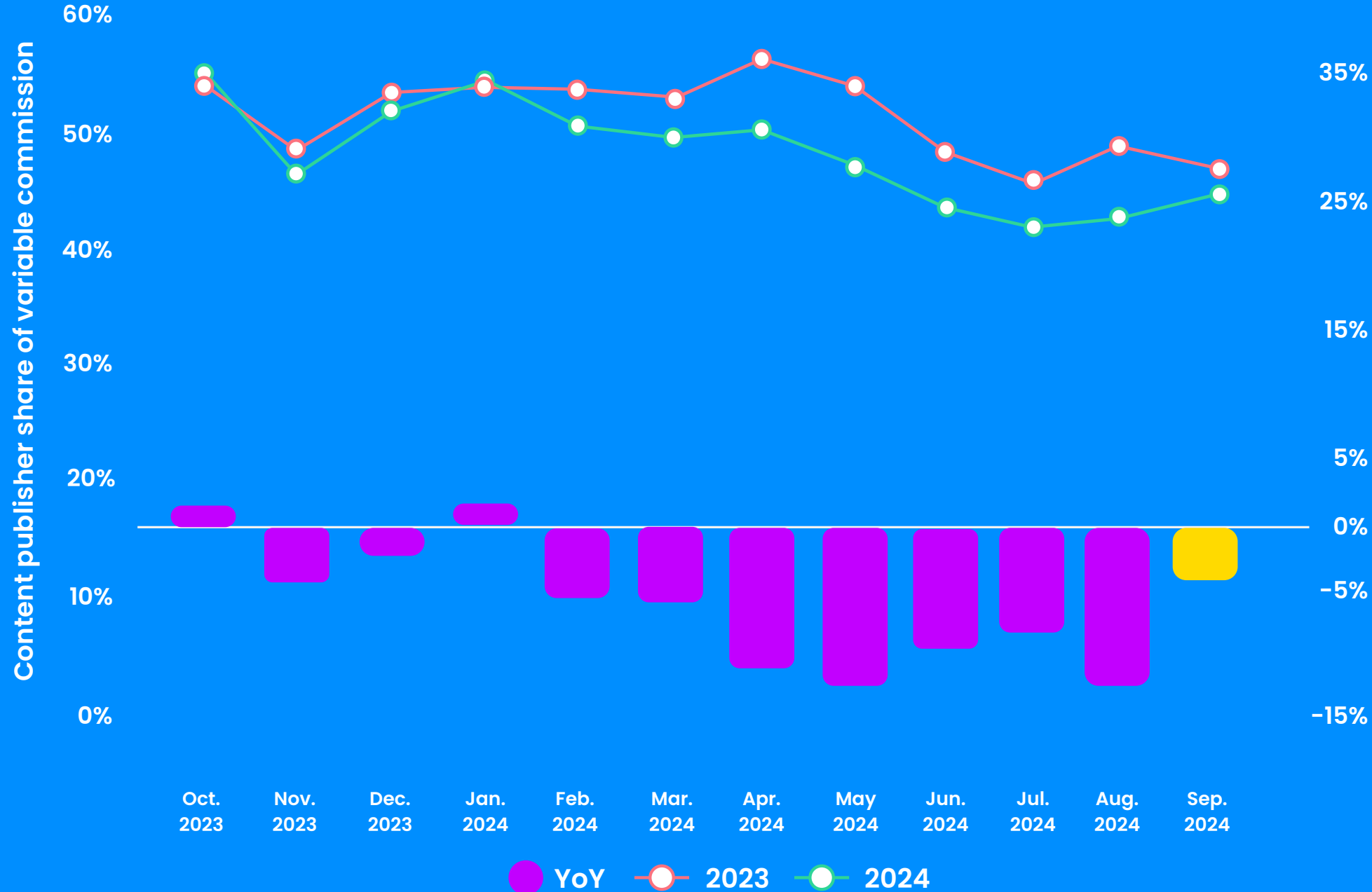
# Content YoY revenue and commission trends

## Content revenue YoY change



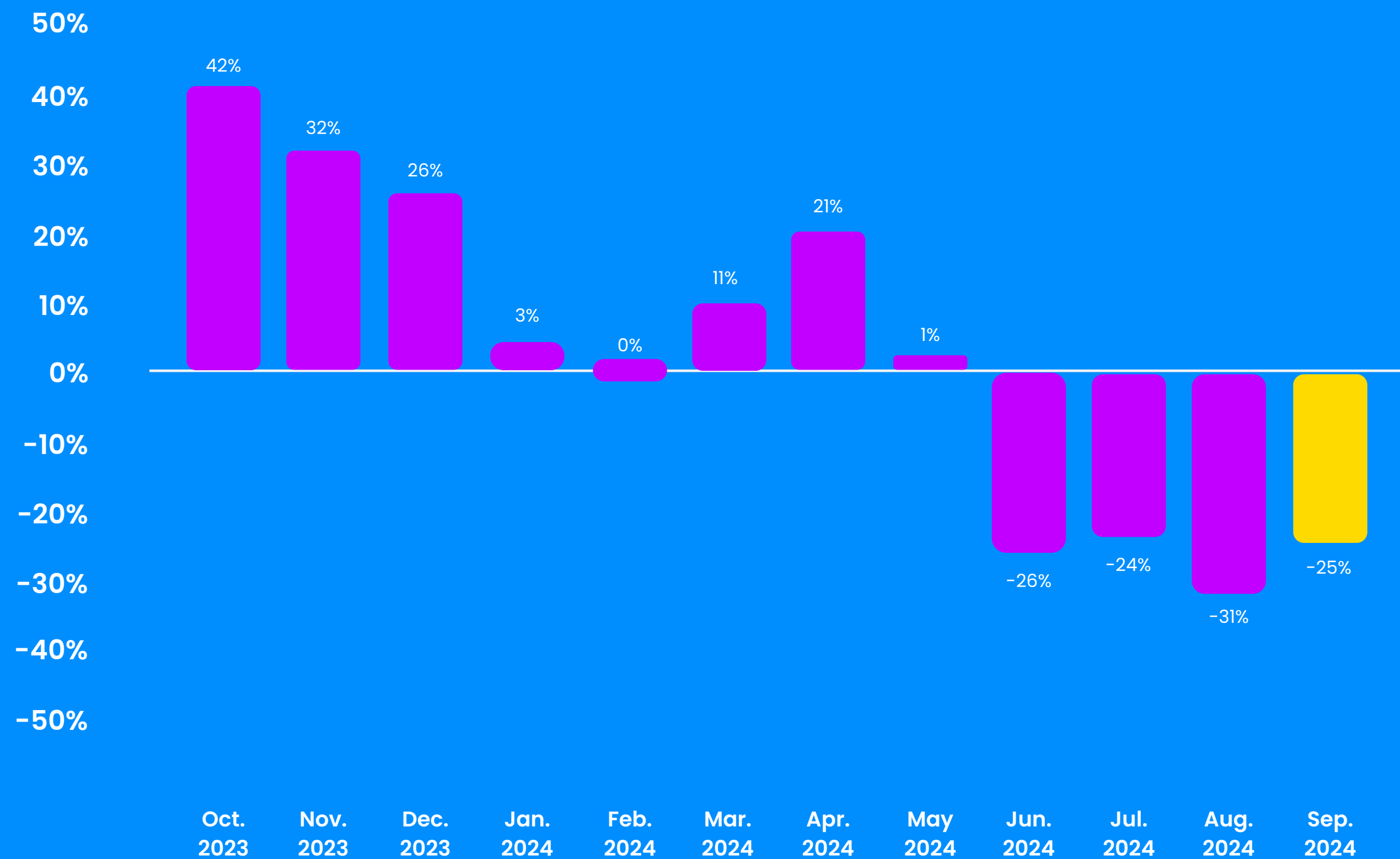
Growth in the content partner category has decreased by 18% in September 2024.

## Content publisher share of variable commission



In September 2024, share of commission for content partners is 44%, down 4% YoY.

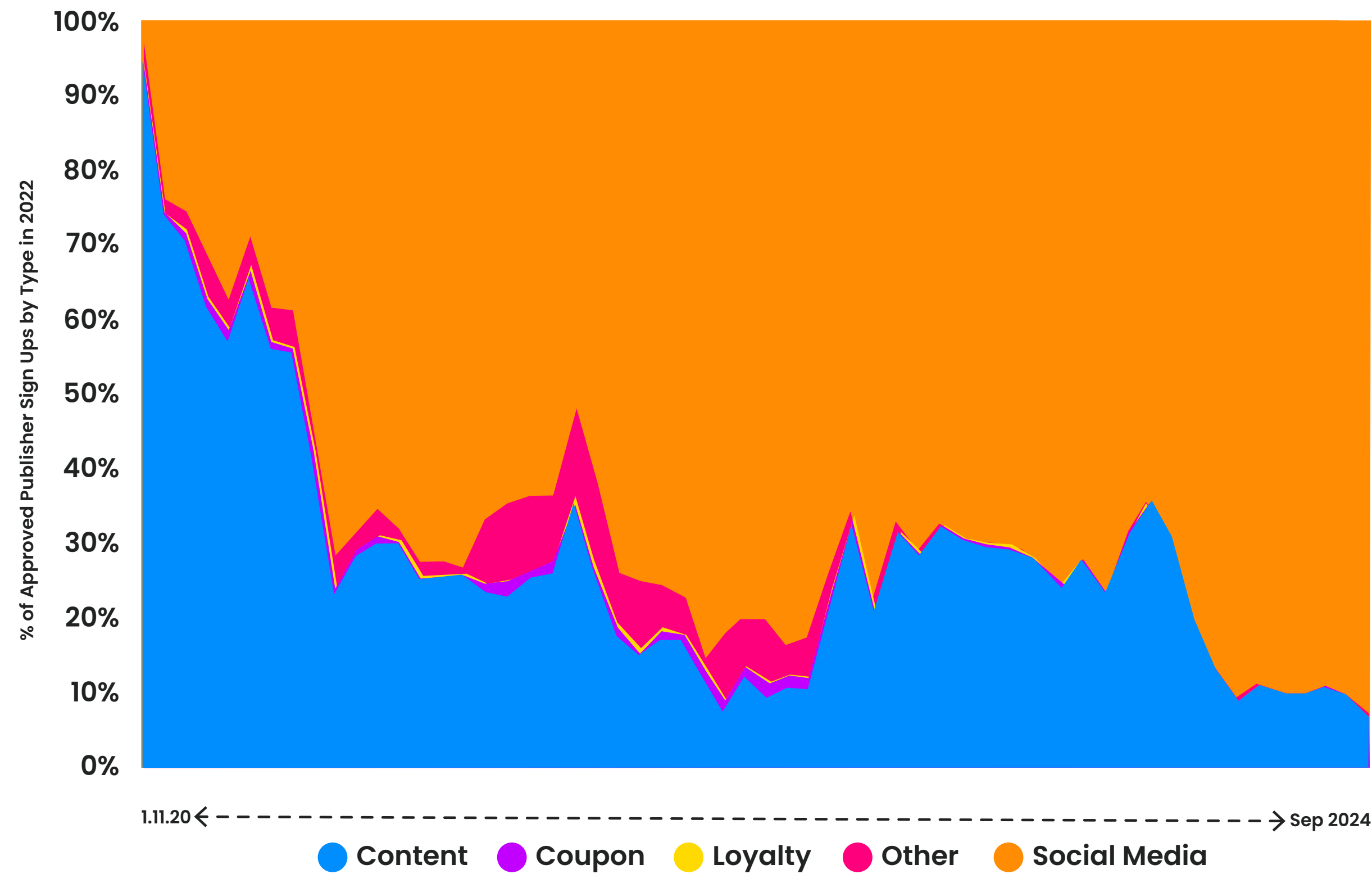
# Publisher partner application growth YoY



**-25%**

Partner Application saw a 25% decrease YoY in September 2024.

# % of approved publisher sign ups by type



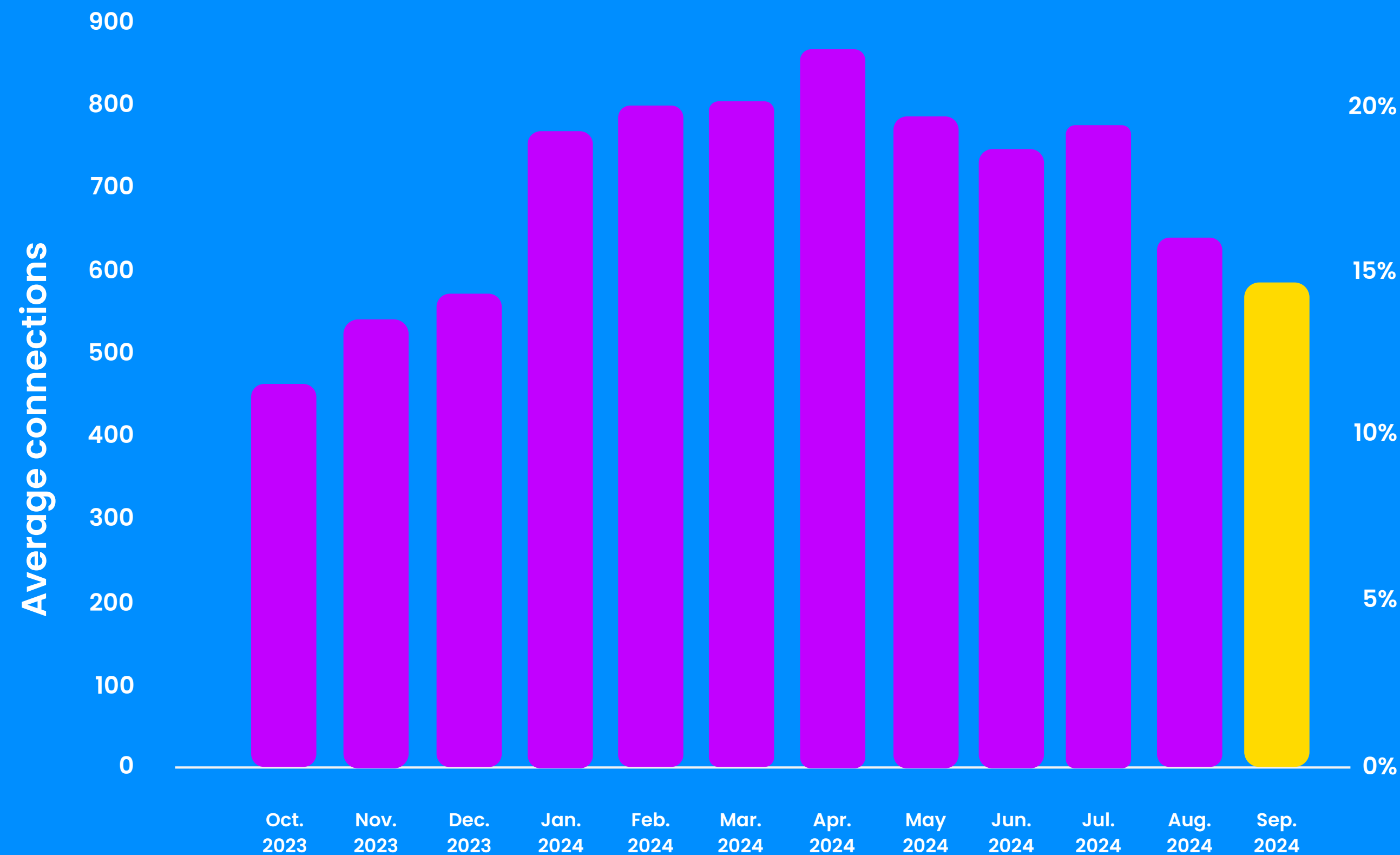
Social media and content partners make up the majority of new publishers joining the Ascend platform.

The trends have remained pretty consistent throughout the past year.



# Advertiser-Partner connections

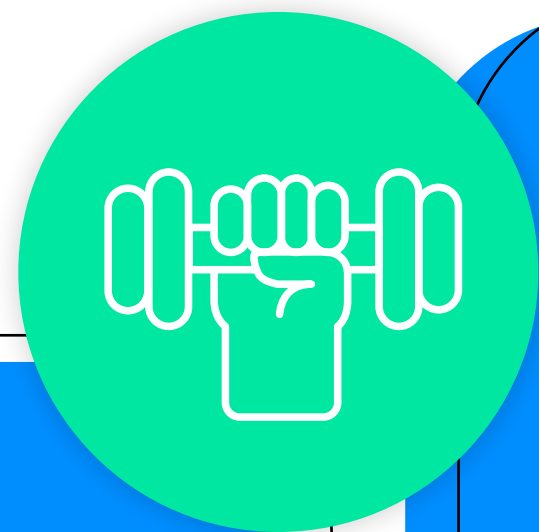
A connection between an advertiser and publisher is when the programs are joined.



**14.68%**

In the month of September, we saw a 14.68% increase YoY in the average number of connections per advertiser. The number of advertiser-publisher connections that are generating revenue in September 2024 is 19, down 5.0% YoY.

# Insights by vertical.



# YoY revenue share and revenue growth rate by vertical

All data represents YoY growth for the end of September 2024

Revenue Growth YoY

Revenue share YoY



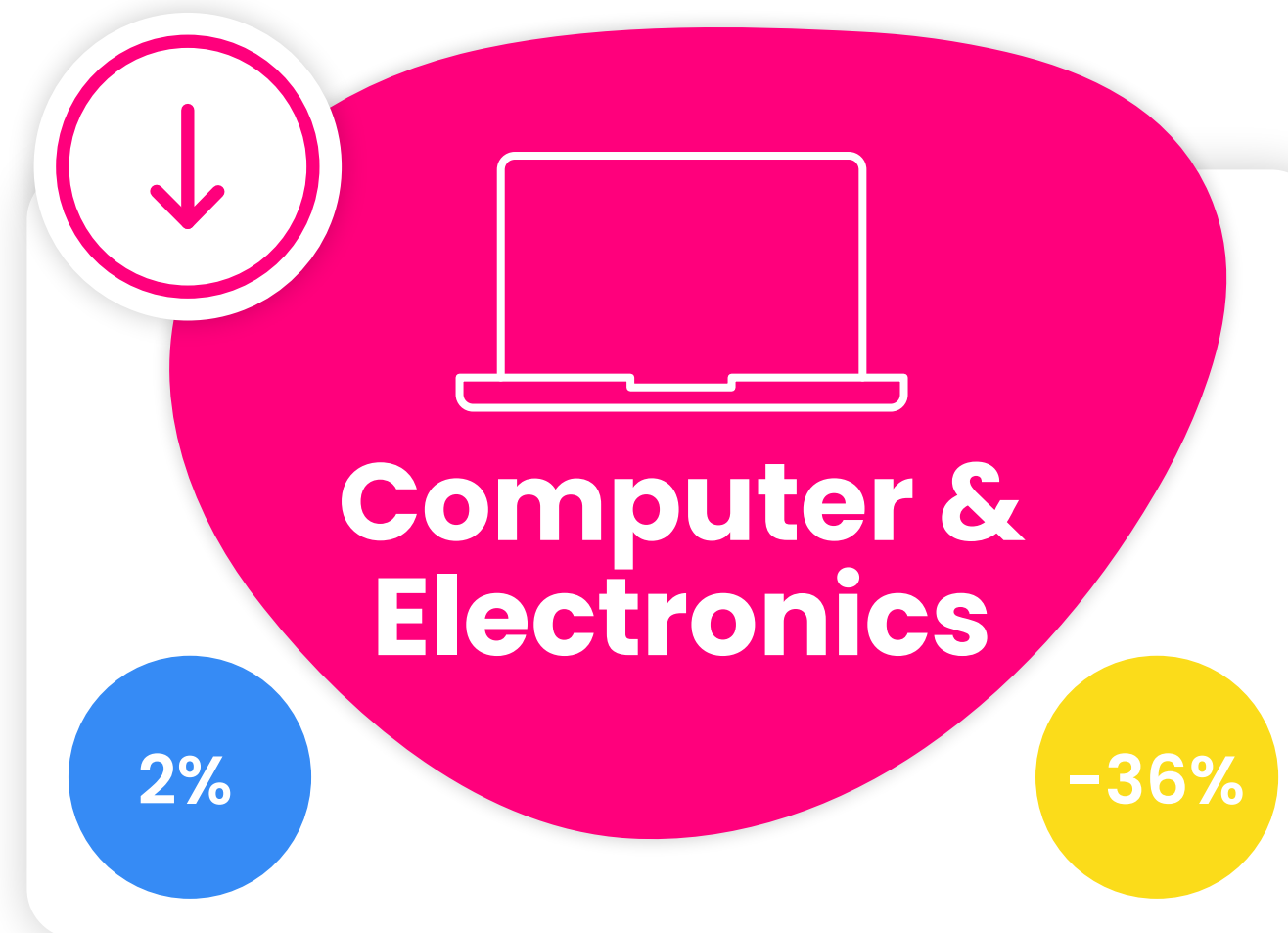
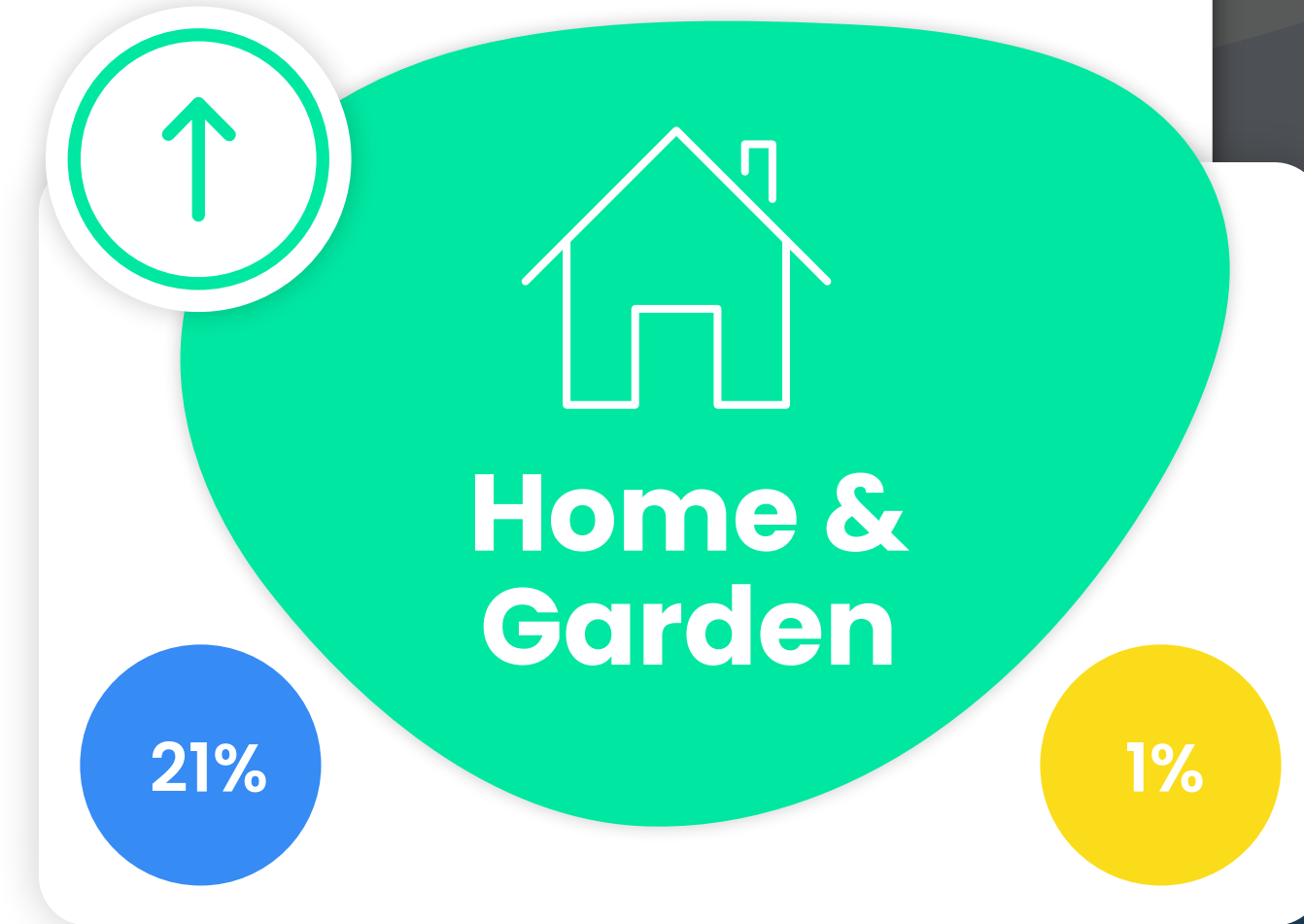
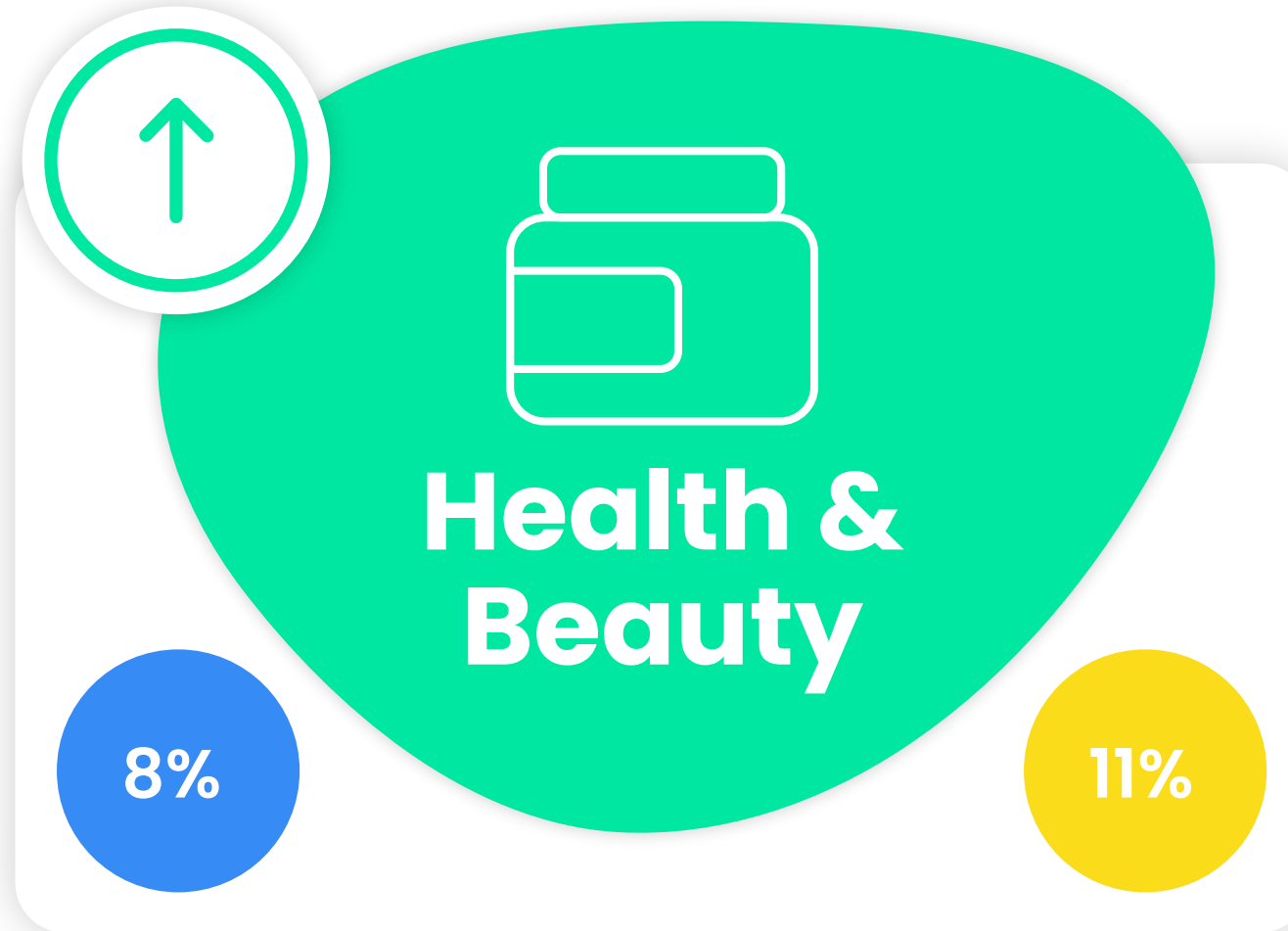
# YoY revenue share and revenue growth rate by vertical

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Revenue Growth YoY



Revenue share YoY

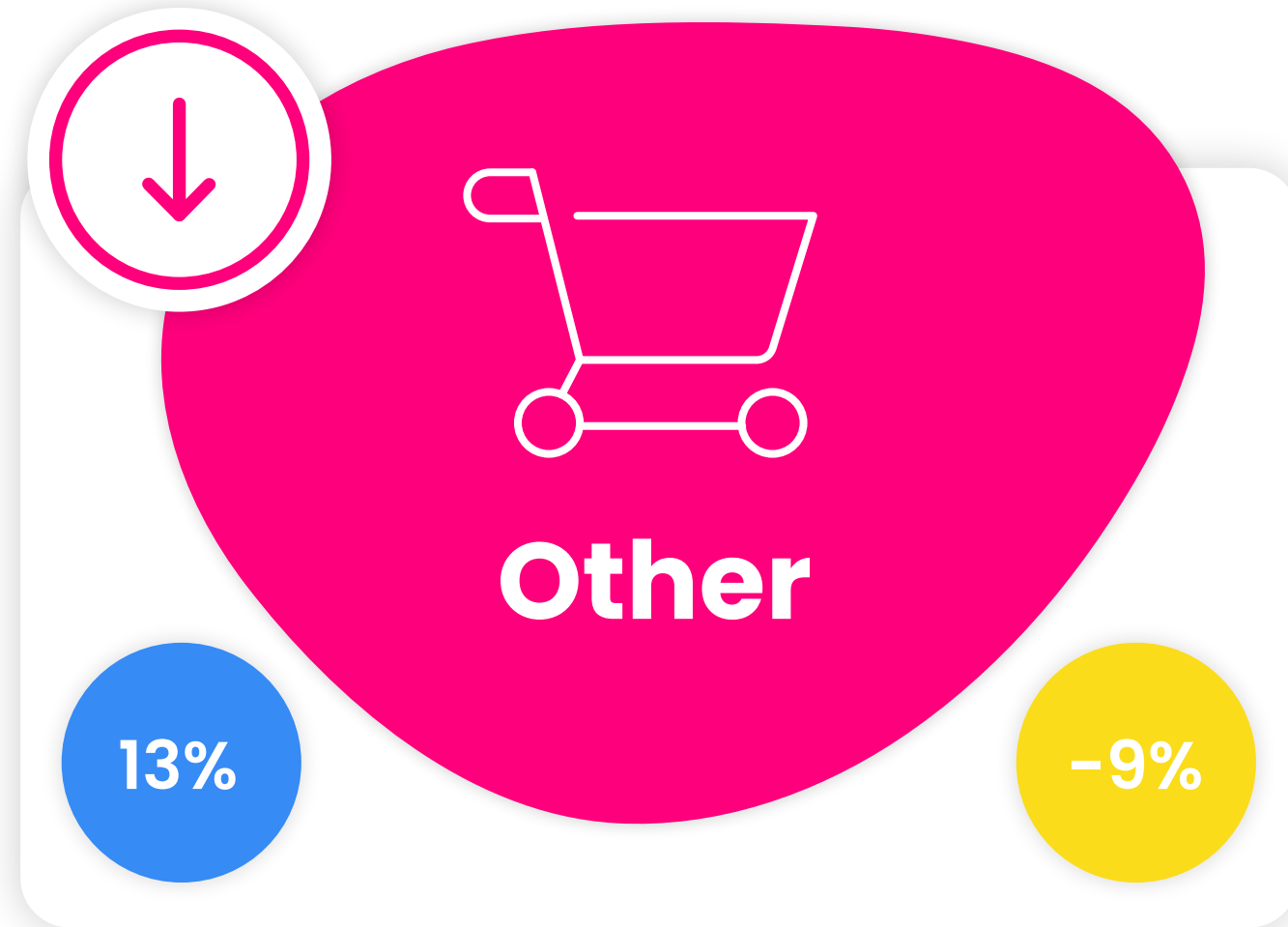


# YoY revenue share and revenue growth rate by vertical

All data represents YoY growth for the end of September 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](mailto:contact@partnerize.com)