



Partnerize

U.S. Retail Affiliate Marketing Sales Index

Updated through September 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 September 2023

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Food & Drink



+1% YoY

Home & Garden



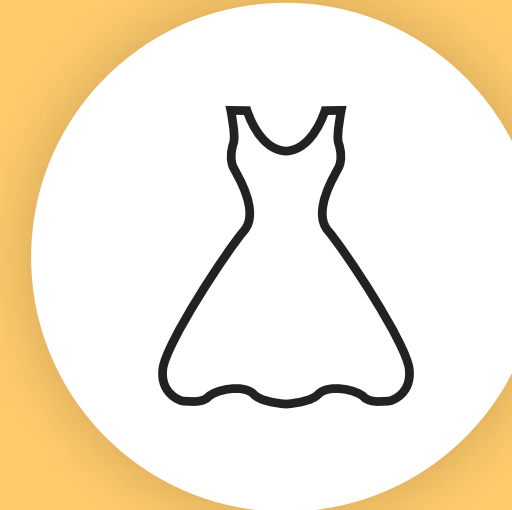
-19% YoY

Accessories & Jewelry



-17% YoY

Clothing & Apparel



-22% YoY

Gifts & Flowers



-16% YoY

Health & Beauty



-31% YoY

Computers & Electronics



-47% YoY

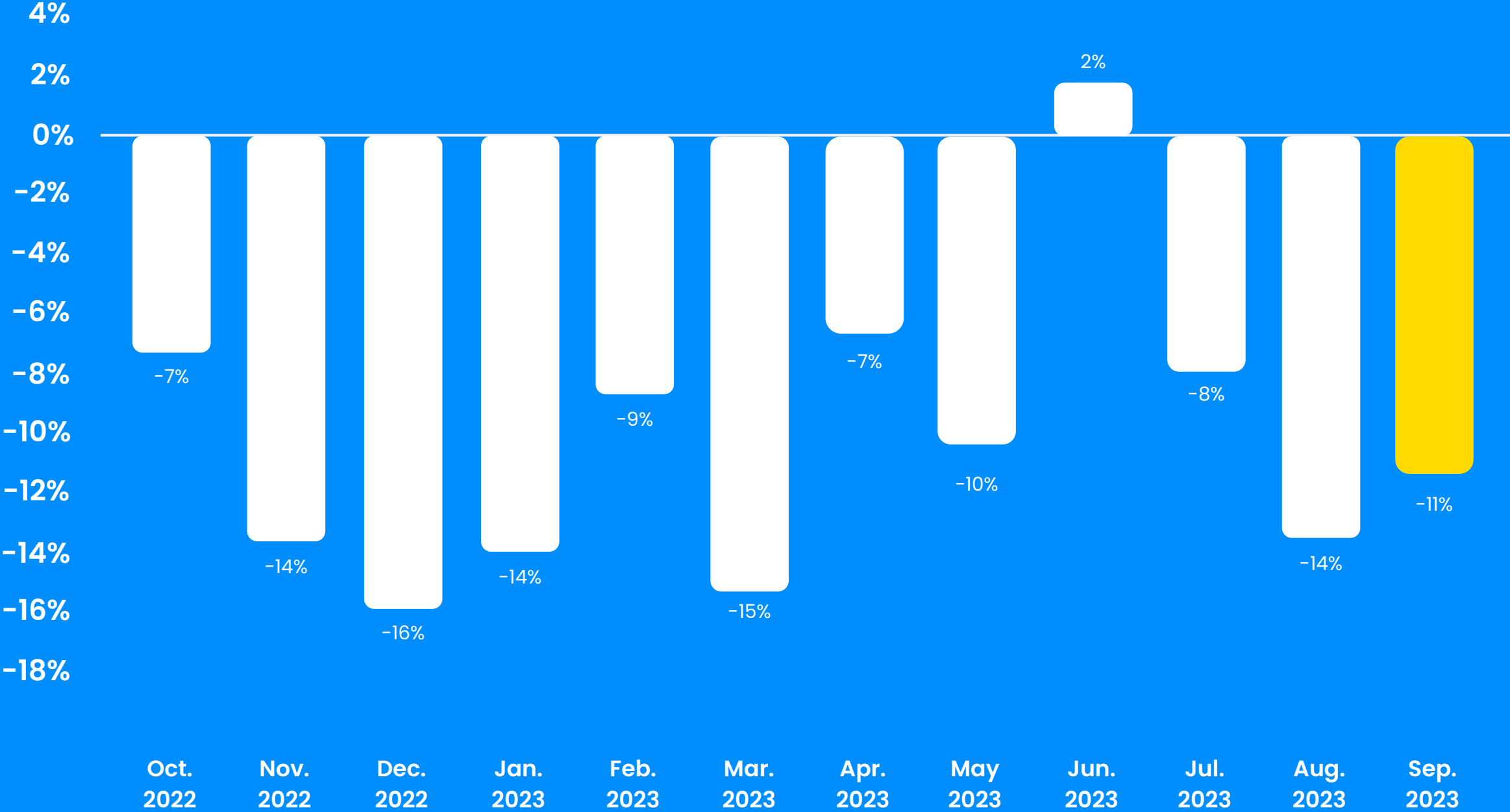
Sports & Fitness



-3% YoY

Monthly revenue trends

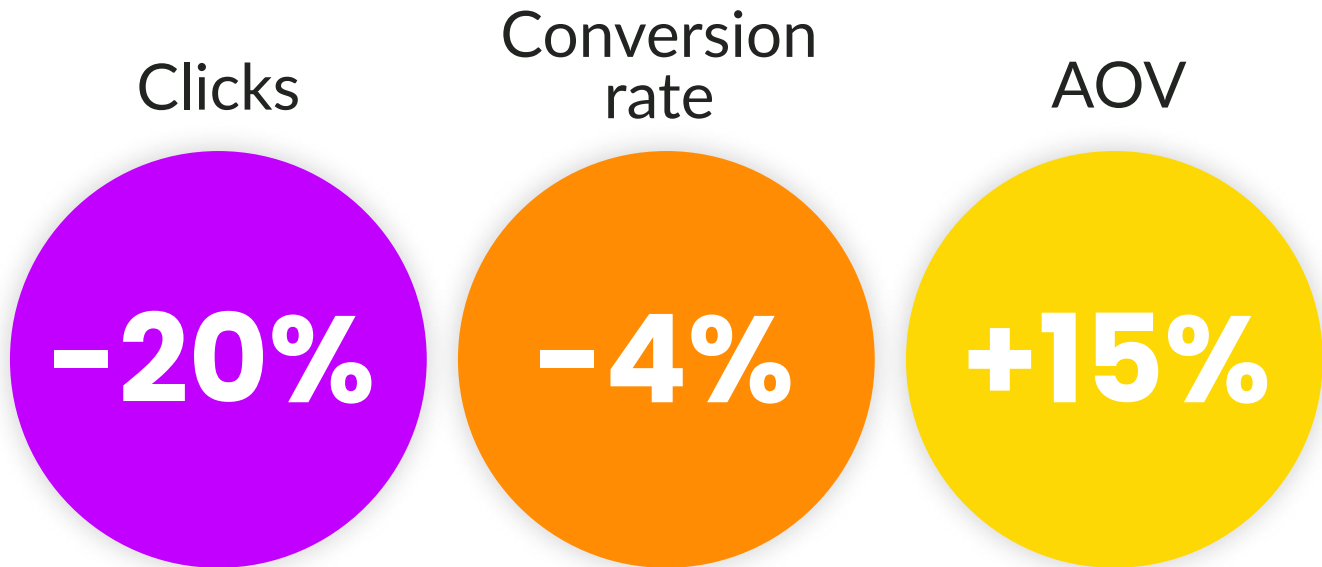
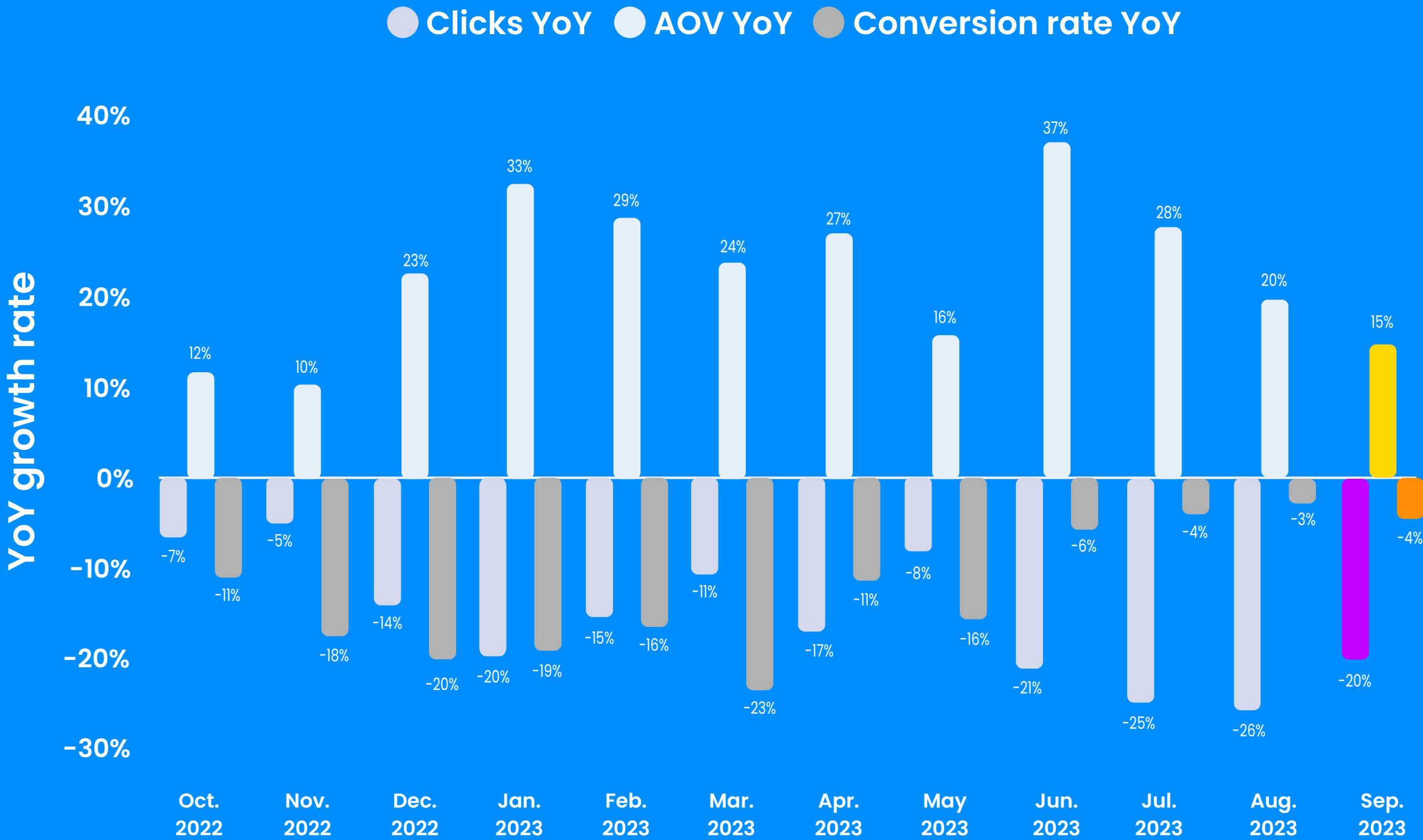
Gross Revenue YoY Growth



-11%

September saw a, 11% decrease in gross revenue YoY.

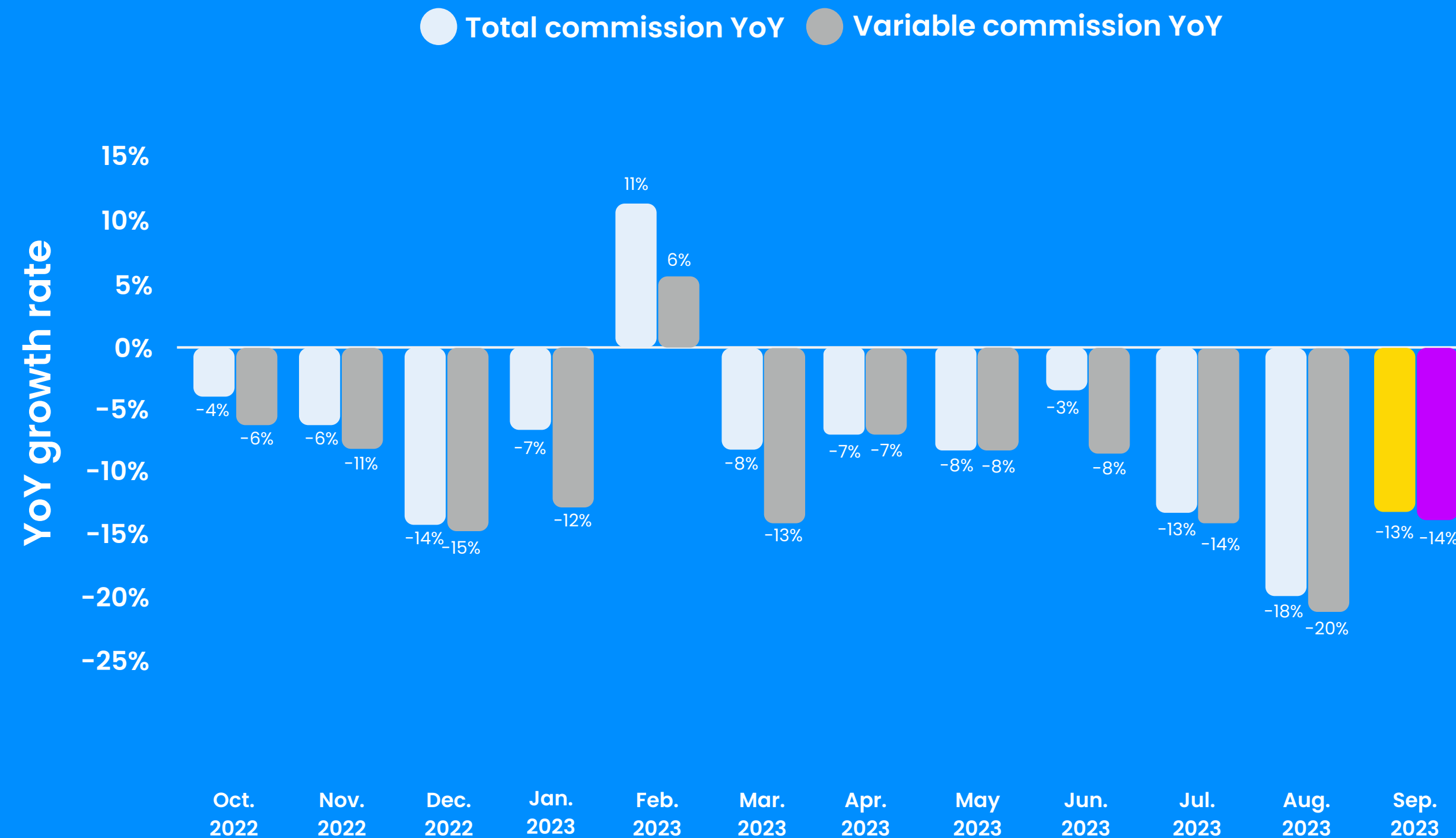
Drivers of monthly revenue growth



In September, the 11% decrease in revenue was driven by a YoY decrease in clicks (-20%) and conversion rate (-4%). However, average order value was up significantly at 15% YoY.

Monthly commission trends

6



-13%

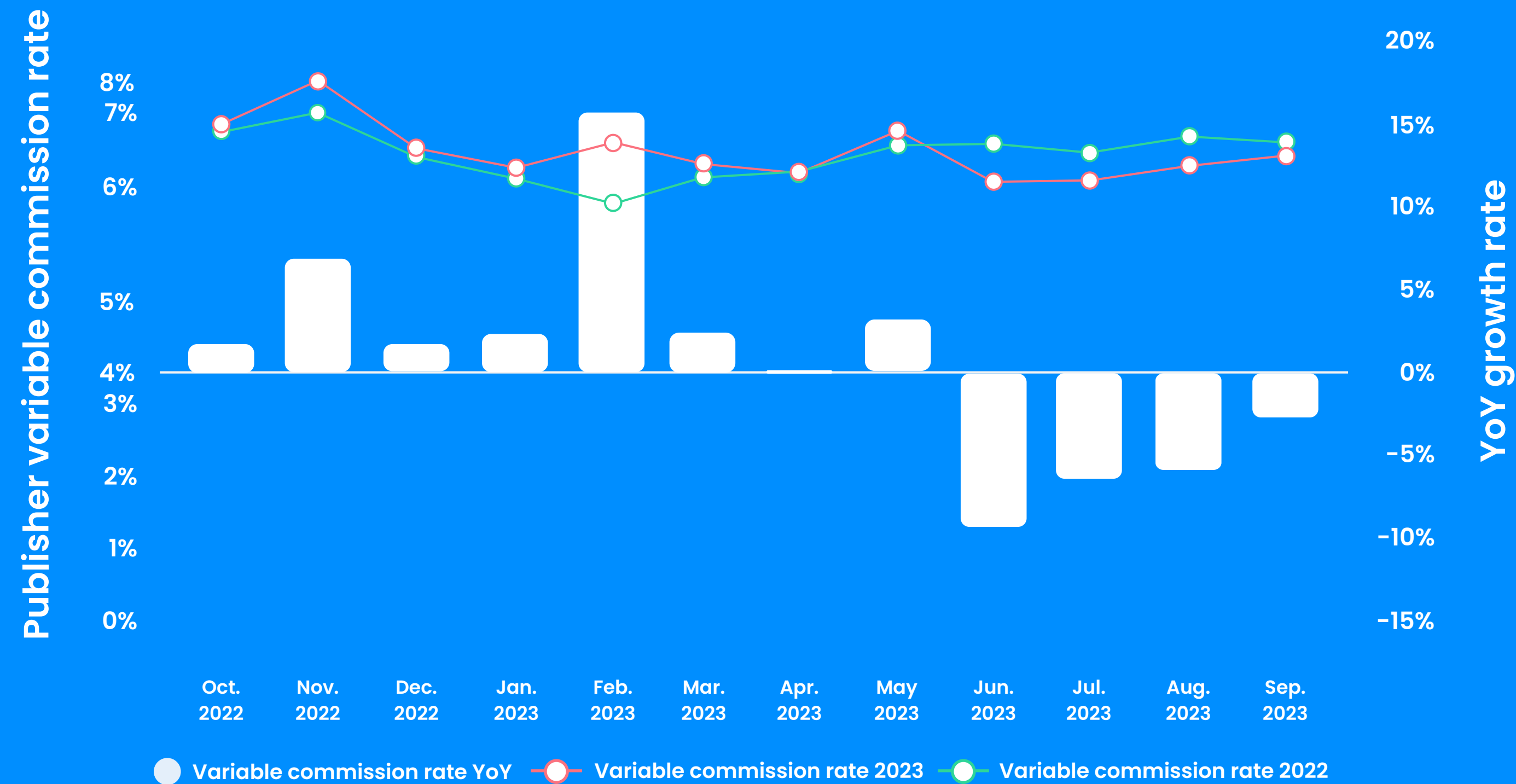
-14%

In September 2023, variable commission is down 14% YoY and total commission is down 13% 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"

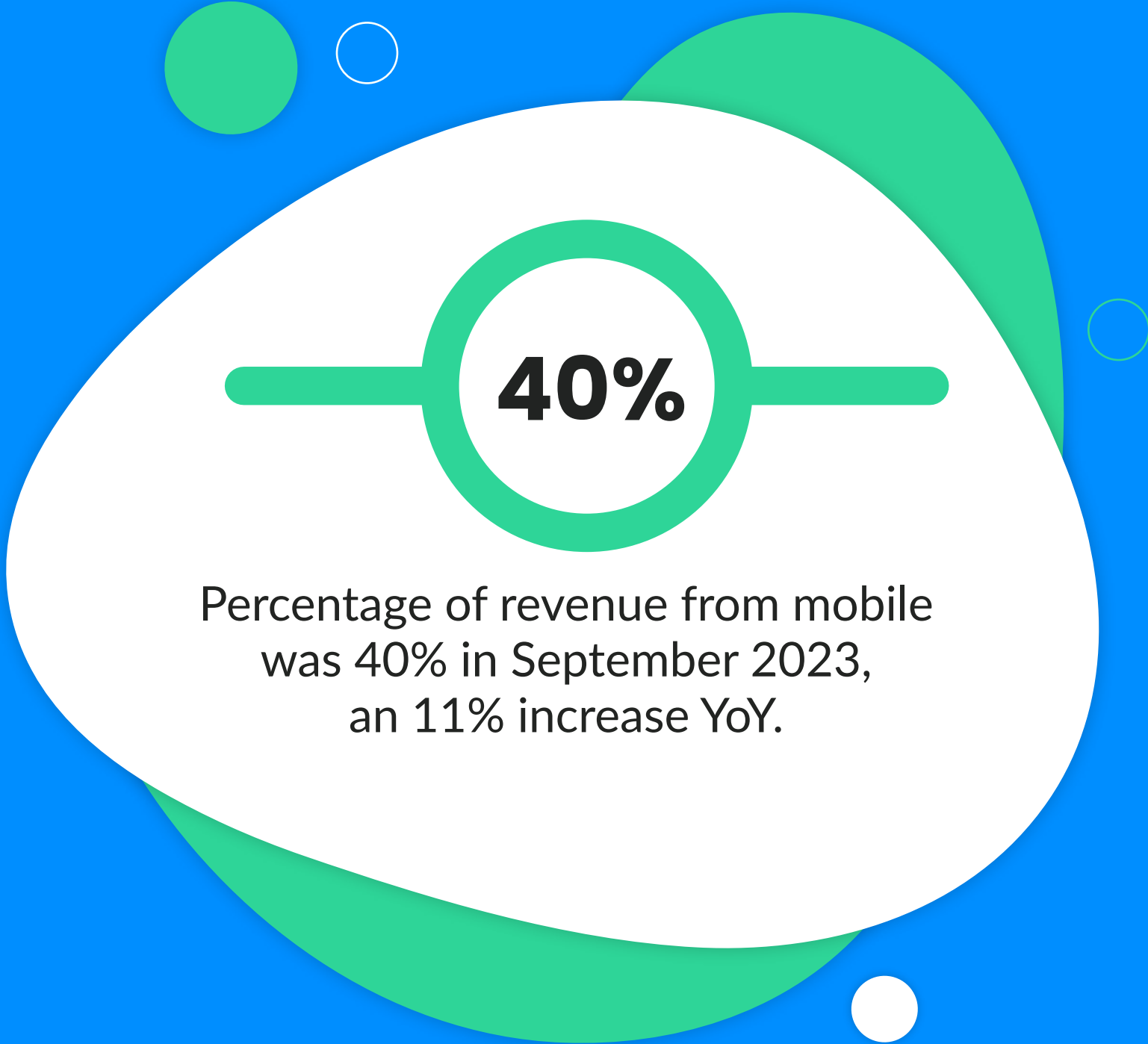
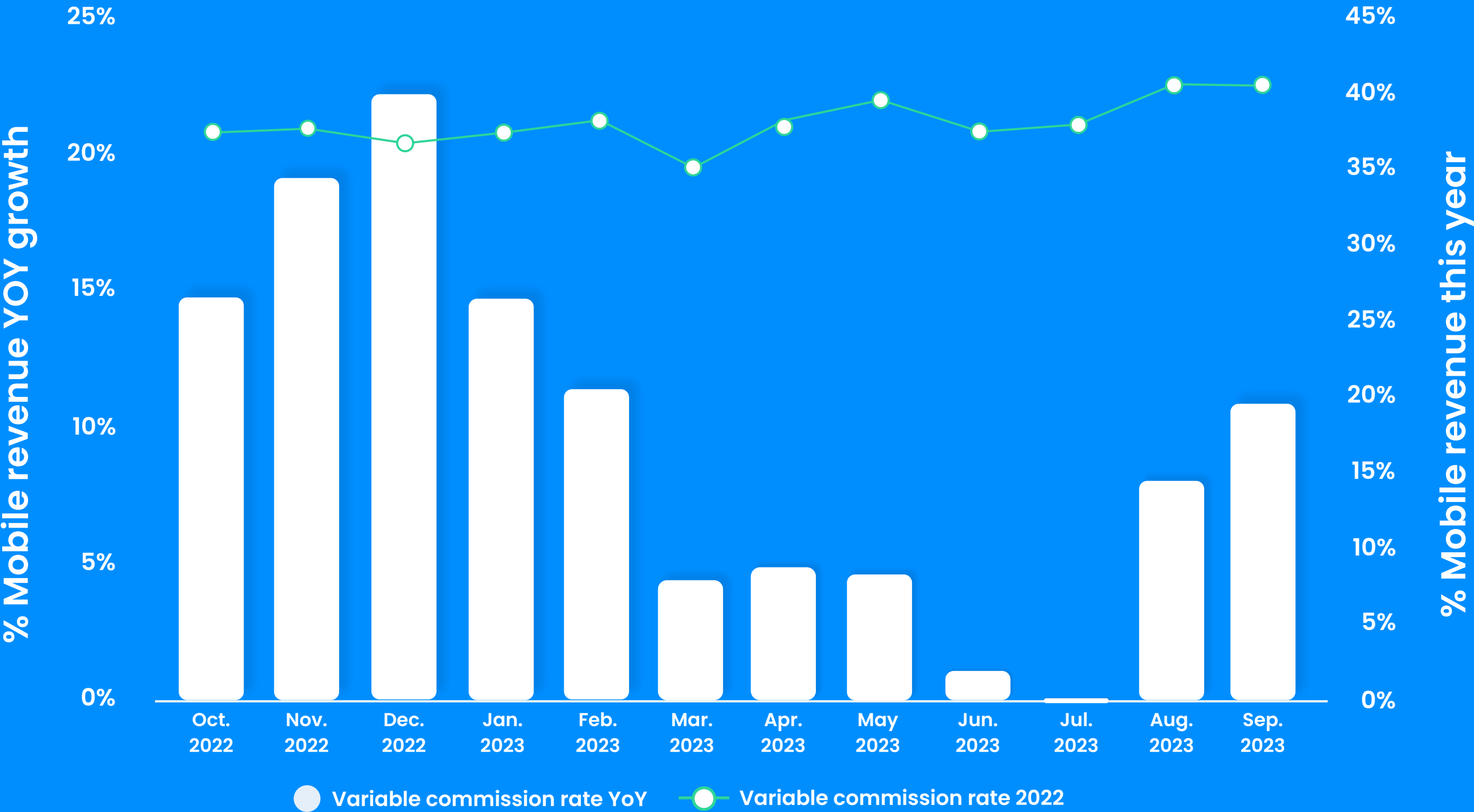
Monthly variable commission rates trends

Variable commission rate and growth YoY

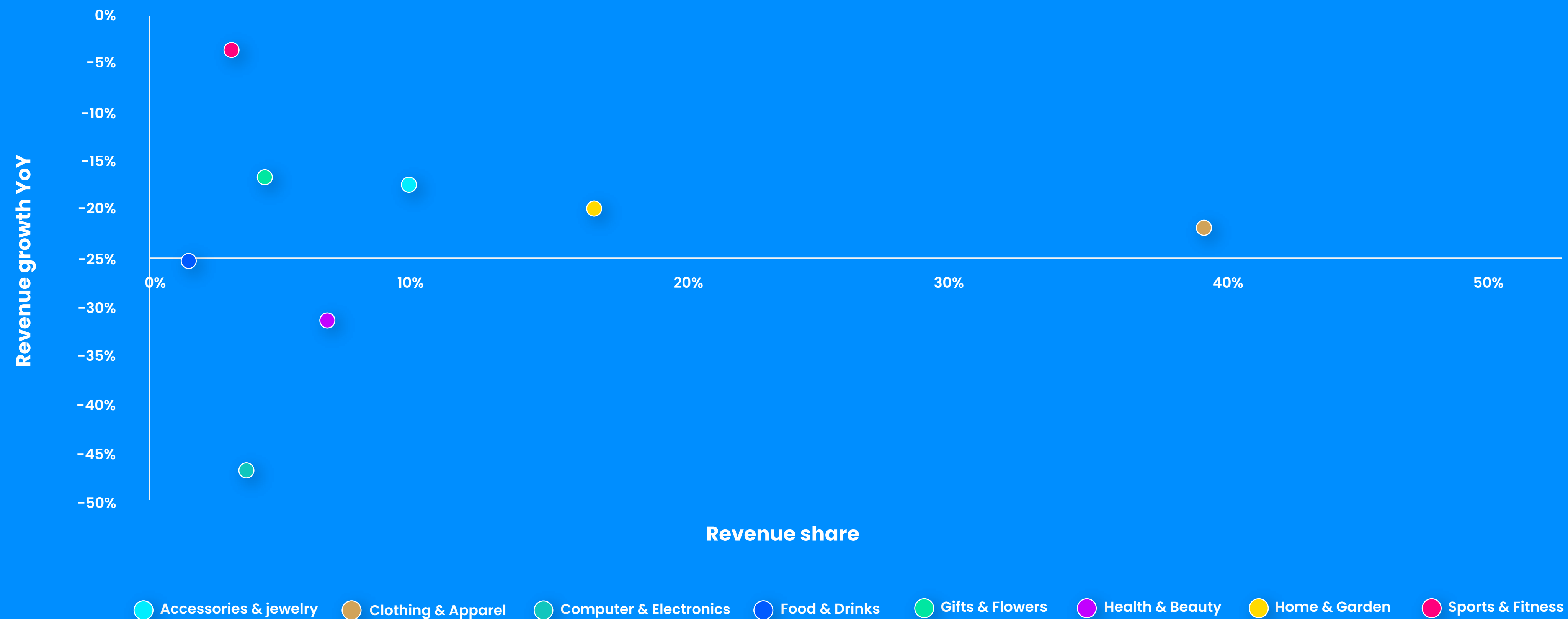


Monthly mobile revenue share

% of revenue from mobile



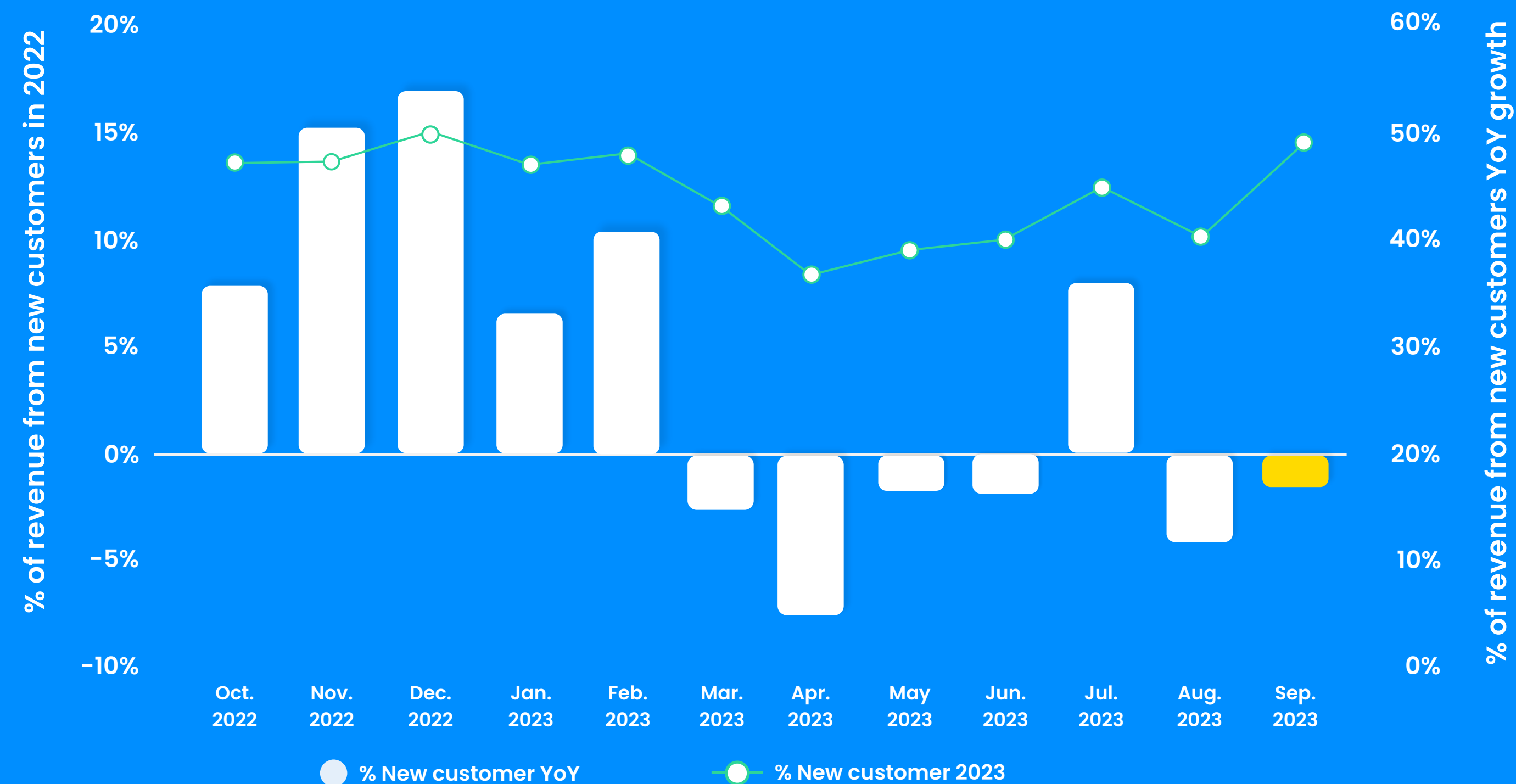
Revenue growth by advertiser vertical



Monthly new customer revenue share

10

% of revenue from new customers



49%

In September 2023, the percentage of revenue acquired from new customers is 49%, up compared to August but a 2% YoY decrease.

New customer revenue by publisher category

11

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



47%

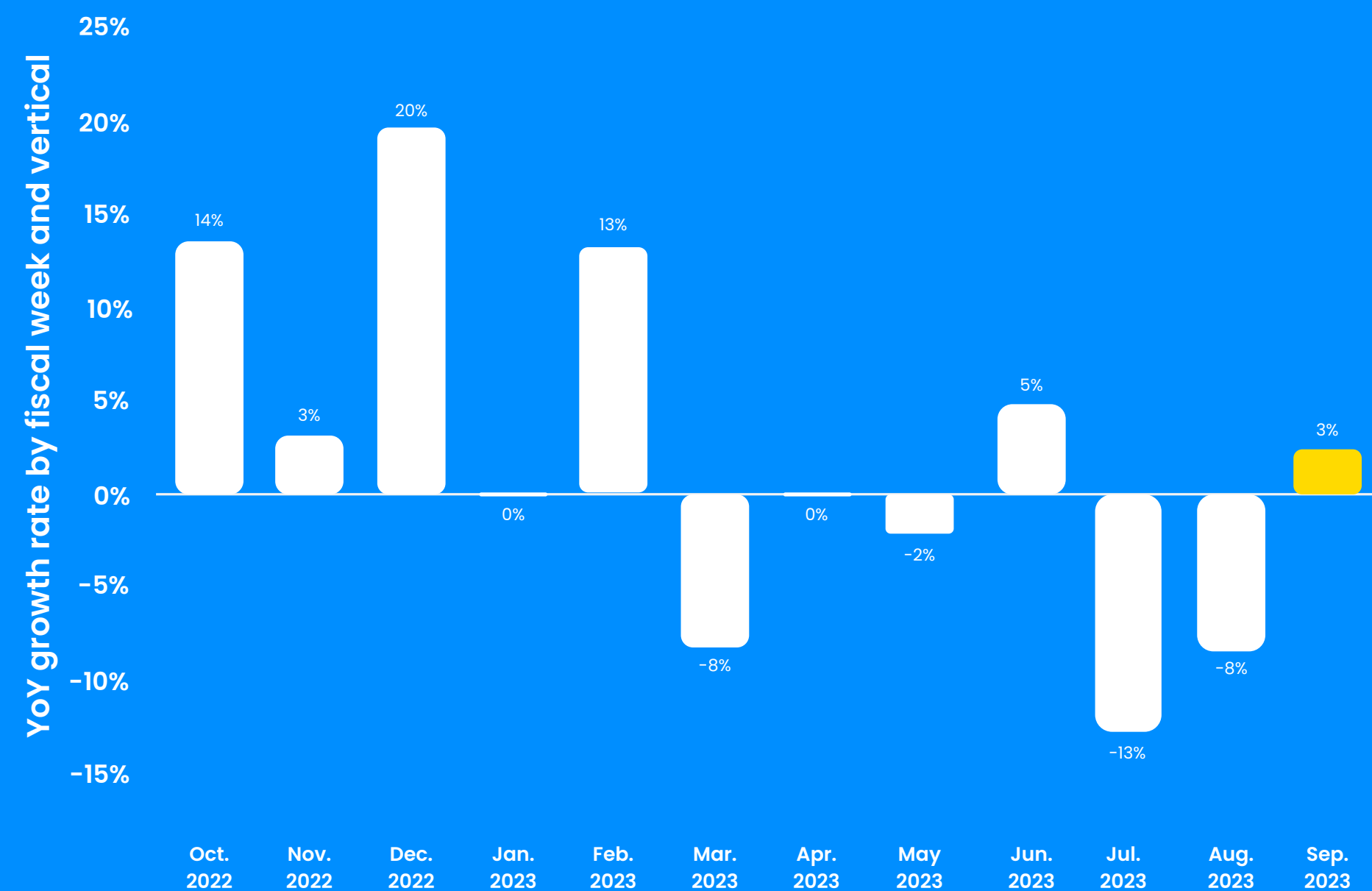
Here is the percentage of revenue from new customers in September, by partner category:

| | |
|--------------|---------------|
| Other 48.7% | Content 54.5% |
| Coupon 47.7% | Loyalty 39.1% |

Content publisher YoY revenue and commission trends

12

Content publisher revenue YoY growth rate



Growth in the content partner category has increased by 3% in September 2023.

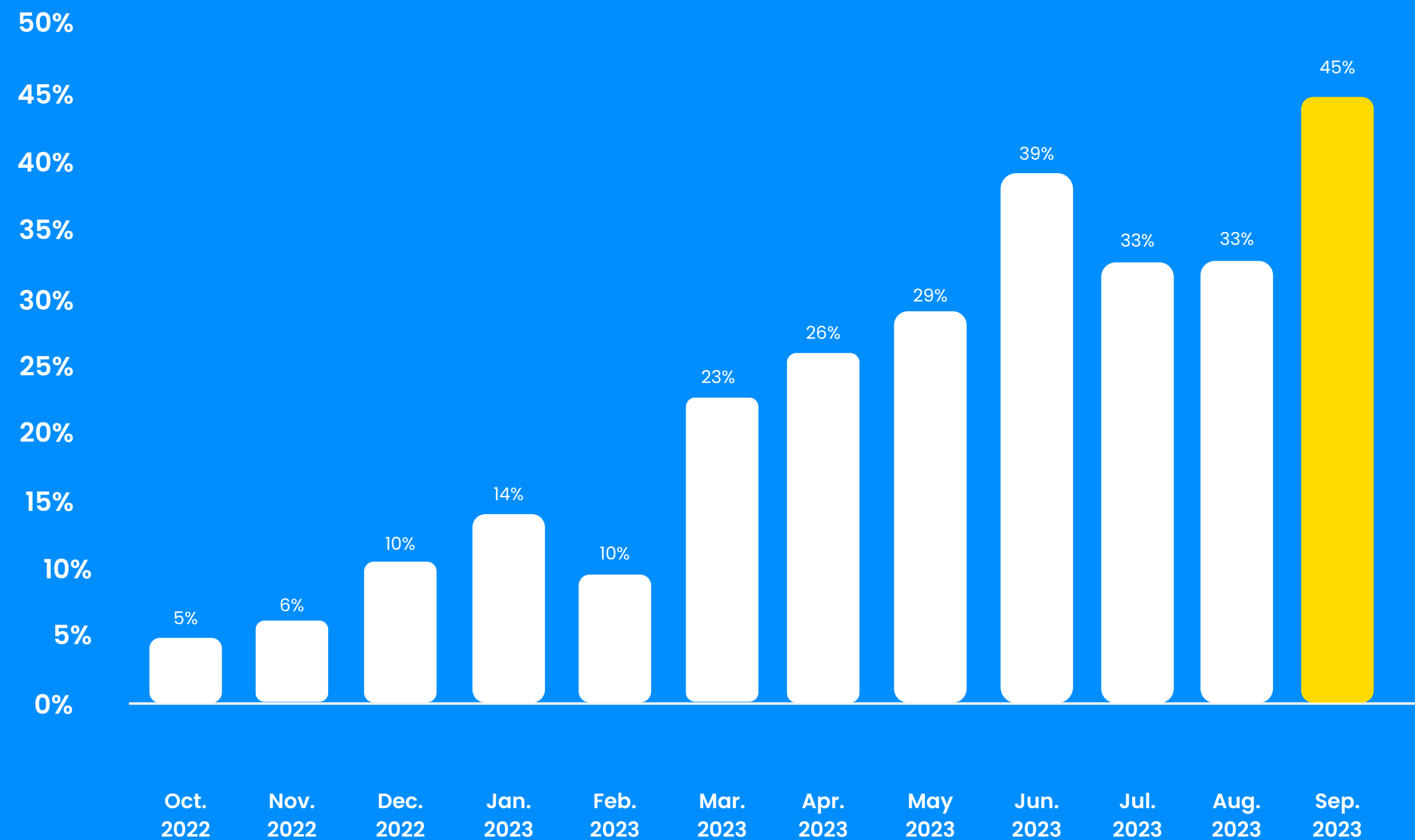
Content publisher share of variable commission



In September 2023, share of commission for content partners is 55%, up 12% YoY.

Publisher partner application growth YoY

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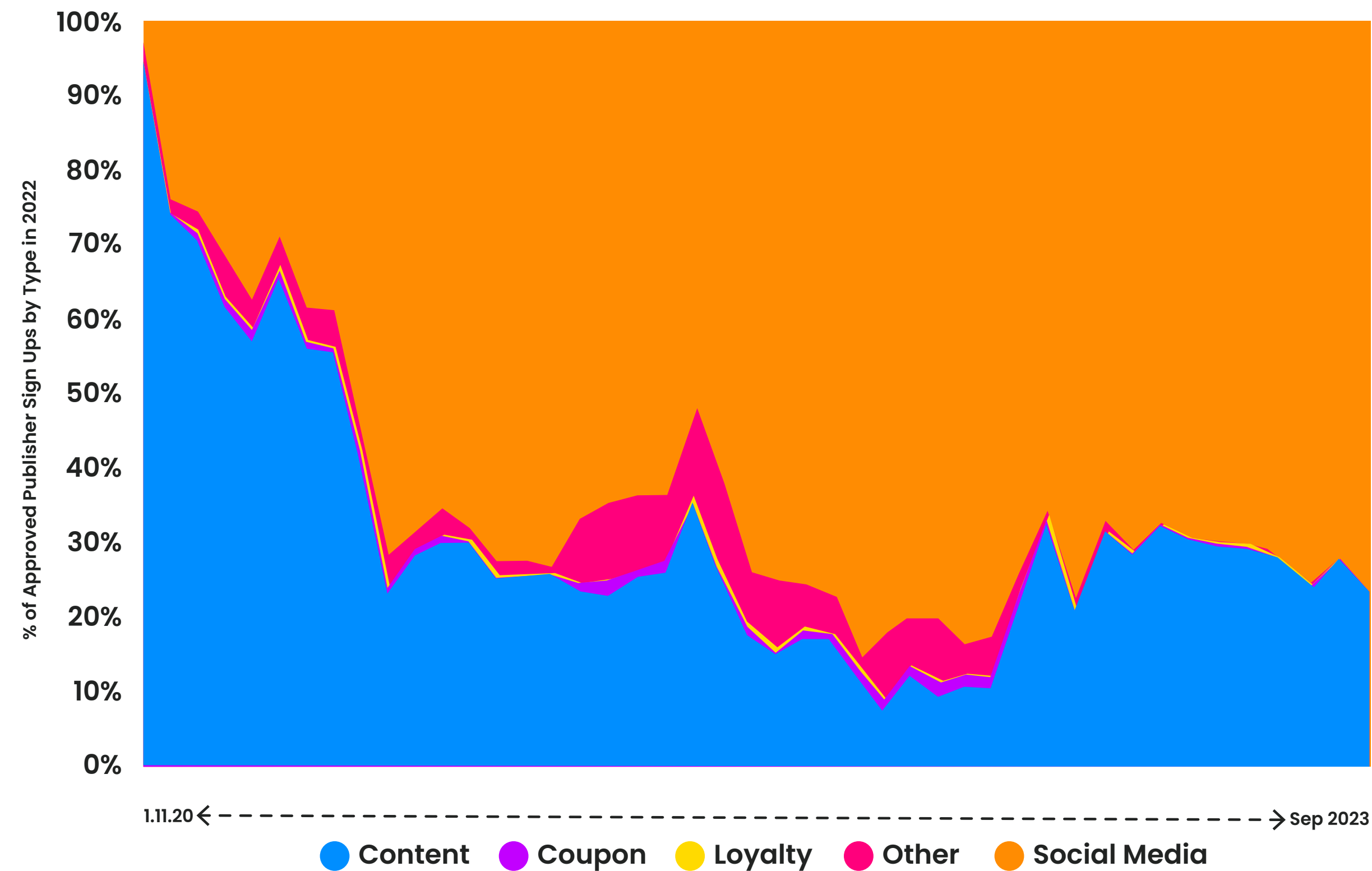


45%

Partner application increased 45% YoY in September 2023, higher than other months in 2023.

% of approved publisher sign ups by type

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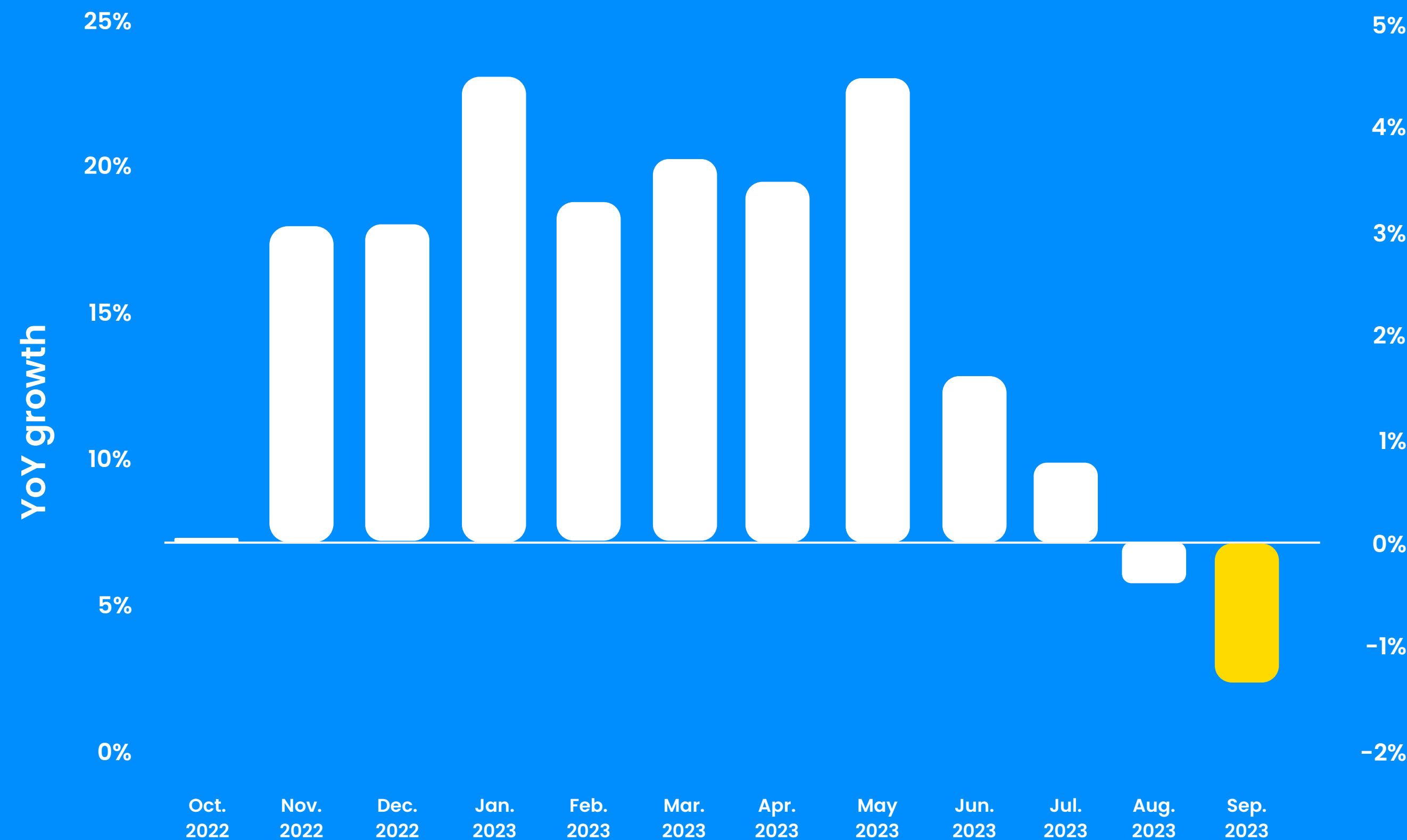


Social Media and Content partners make up the majority of new publishers joining the Ascend™ network.

The trends have remained pretty consistent throughout 2023.

Average revenue generating connections per advertiser

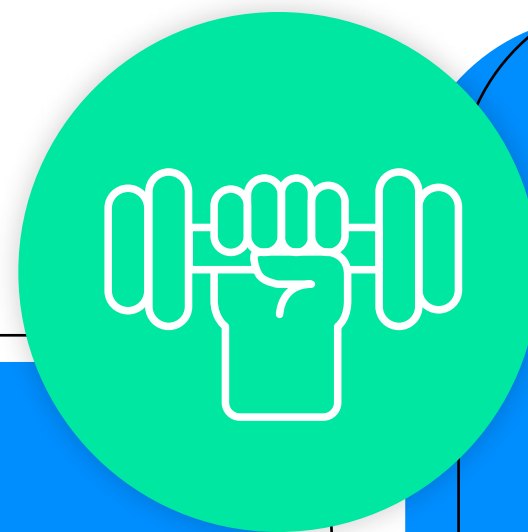
15



6%

In the month of September, we saw a 6% increase YoY in the average number of connections per advertiser.

Insights by vertical.

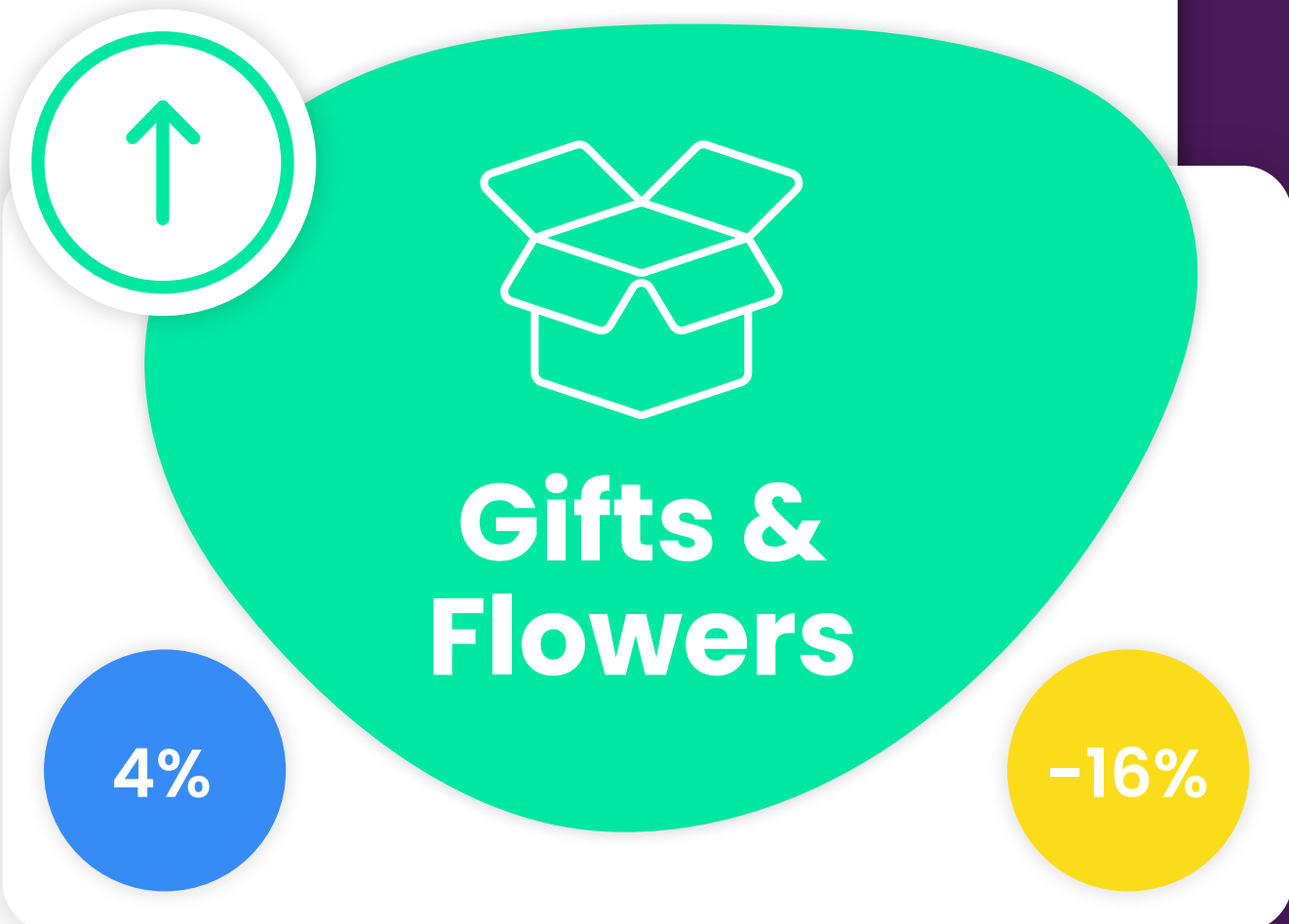


Click and revenue YoY growth rate by vertical

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

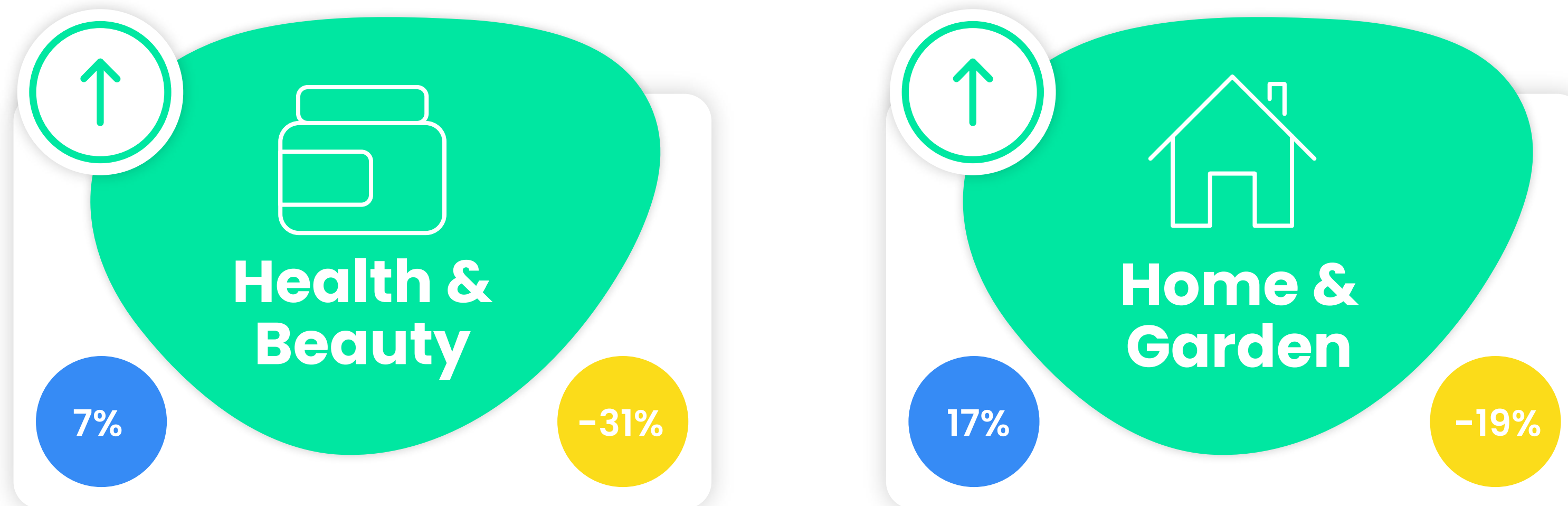
Revenue Growth YoY

Revenue share YoY



Click and revenue YoY growth rate by vertical

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



● Revenue share YoY ● Revenue Growth YoY



A better way to partner.

Interested in learning more
with a Partnerize expert?

Contact us at

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