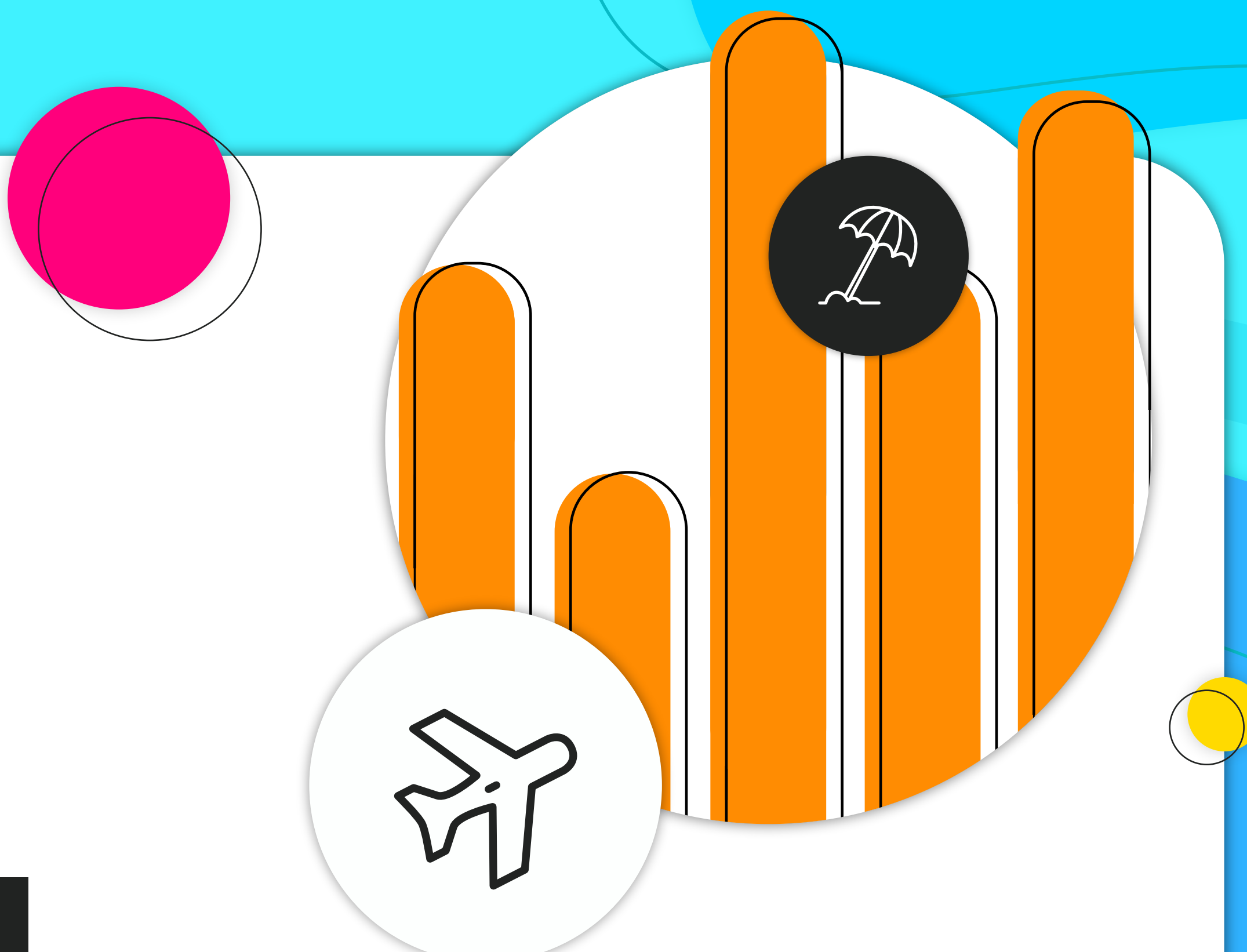




Partnerize

Travel Benchmarks

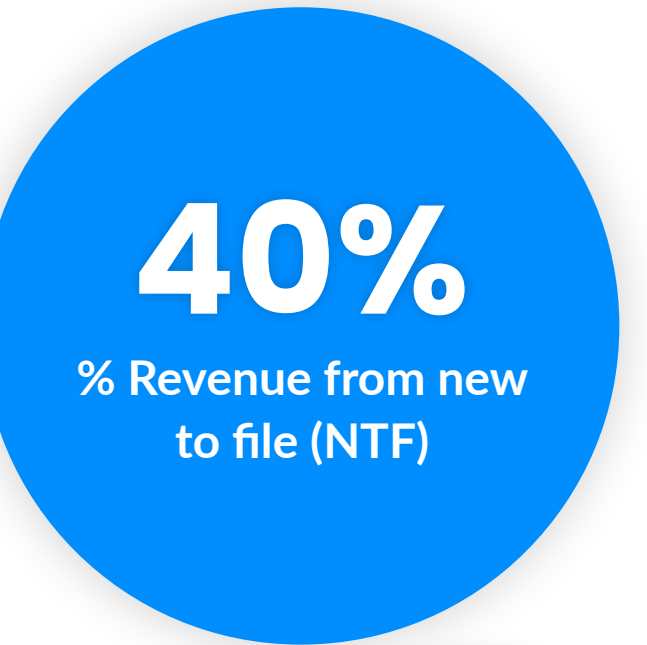
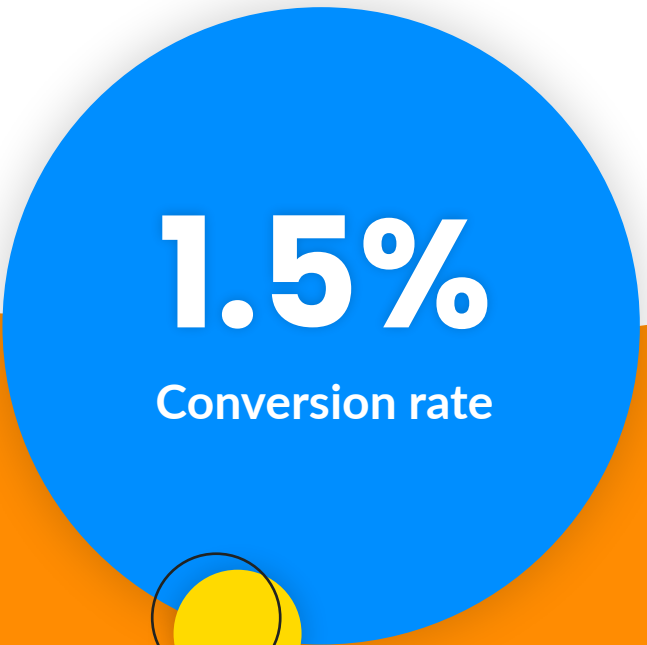
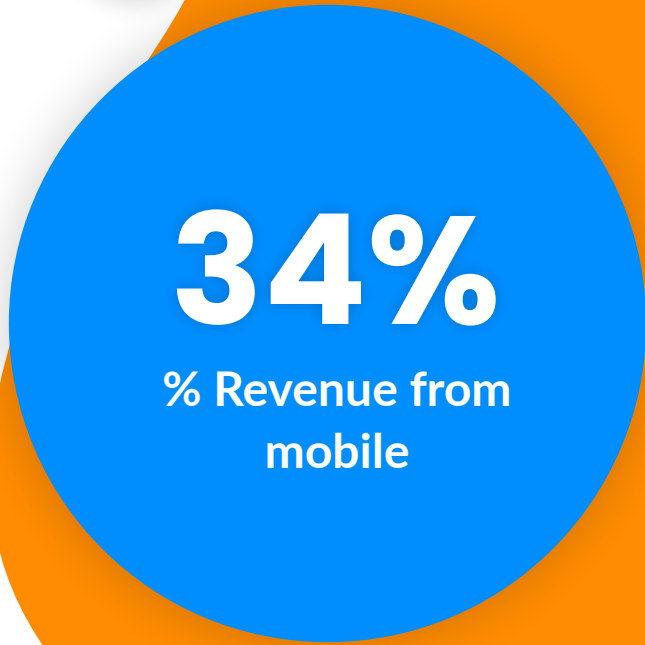
Q1 2025

Introduction

In today's dynamic travel landscape, where booking patterns and traveler preferences are constantly shifting, data has become the compass guiding savvy marketers. Recognizing this critical need for insights, Partnerize has delved into key trends within the travel sector across various regions. The resulting analysis, featured in the Partnership Travel Index, offers travel marketers the essential benchmarks to evaluate, contrast, and fine-tune their partnership initiatives for optimal results. Specifically, Partnership Index for the travel industry measures same-store sales activity directly driven by partnerships in 2025, providing a valuable year-over-year comparison to the same period in 2024. Leading travel brands utilizing the Partnerize platform contribute their data to this comprehensive analysis, illuminating crucial trends in revenue generation, commission structures, conversion effectiveness, and evolving traveler behavior.

The Partnership Index is not intended as a proxy for overall partnership marketing activity, e-commerce activity overall, or the performance of any individual business, including Partnerize t/a Performance Horizon Group. On a periodic basis, we review and update methodology and perform normalization to account for data anomalies that may occur.

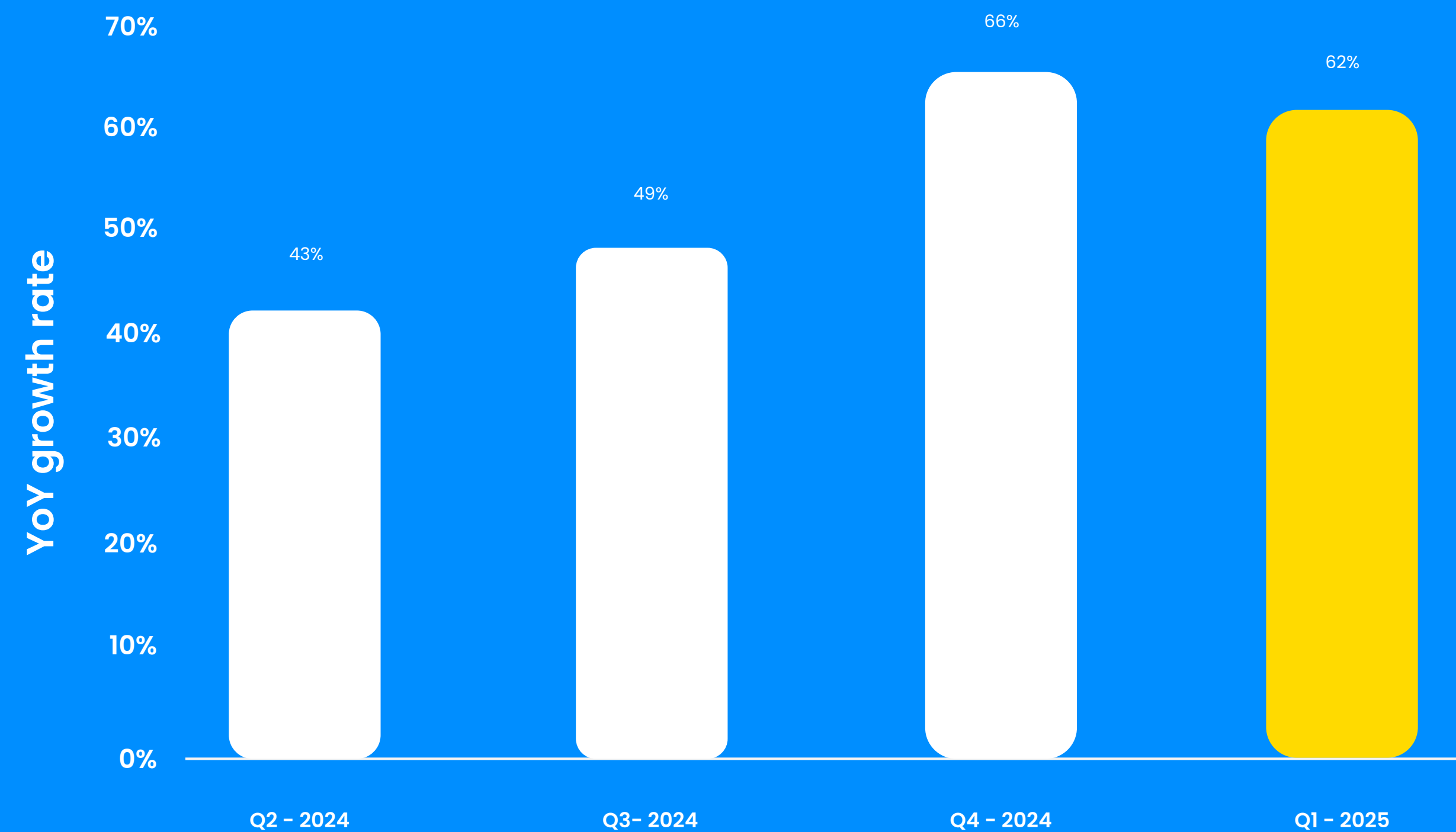
Quarterly highlights



* Click Active means > 10 clicks in quarter | Conversion Active means > 0 conversions in quarter.

Order value growth YoY

4



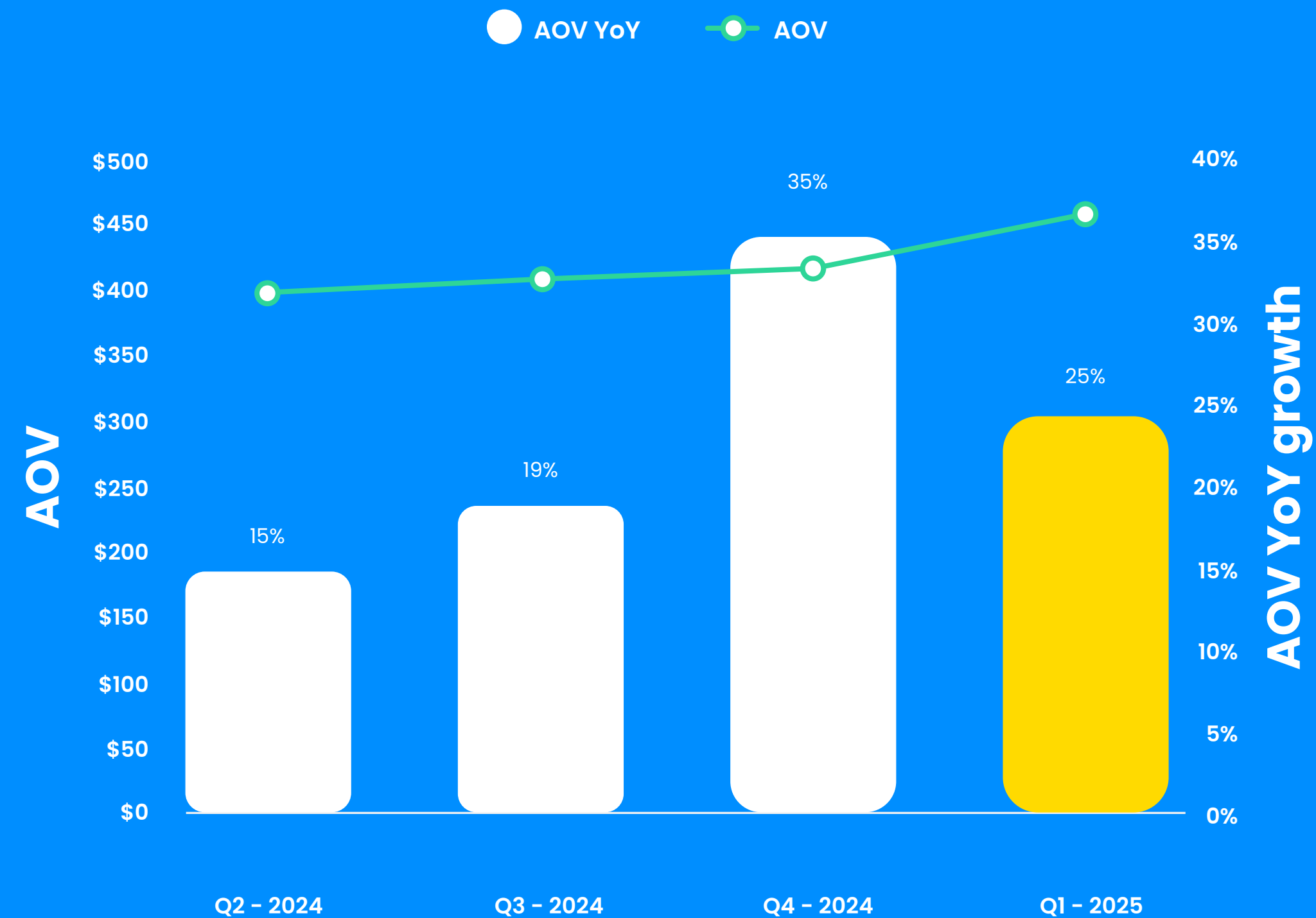
62%

The most recent two quarters observe the largest growth rates in global travel.

AOV (USD) and conv rate trends

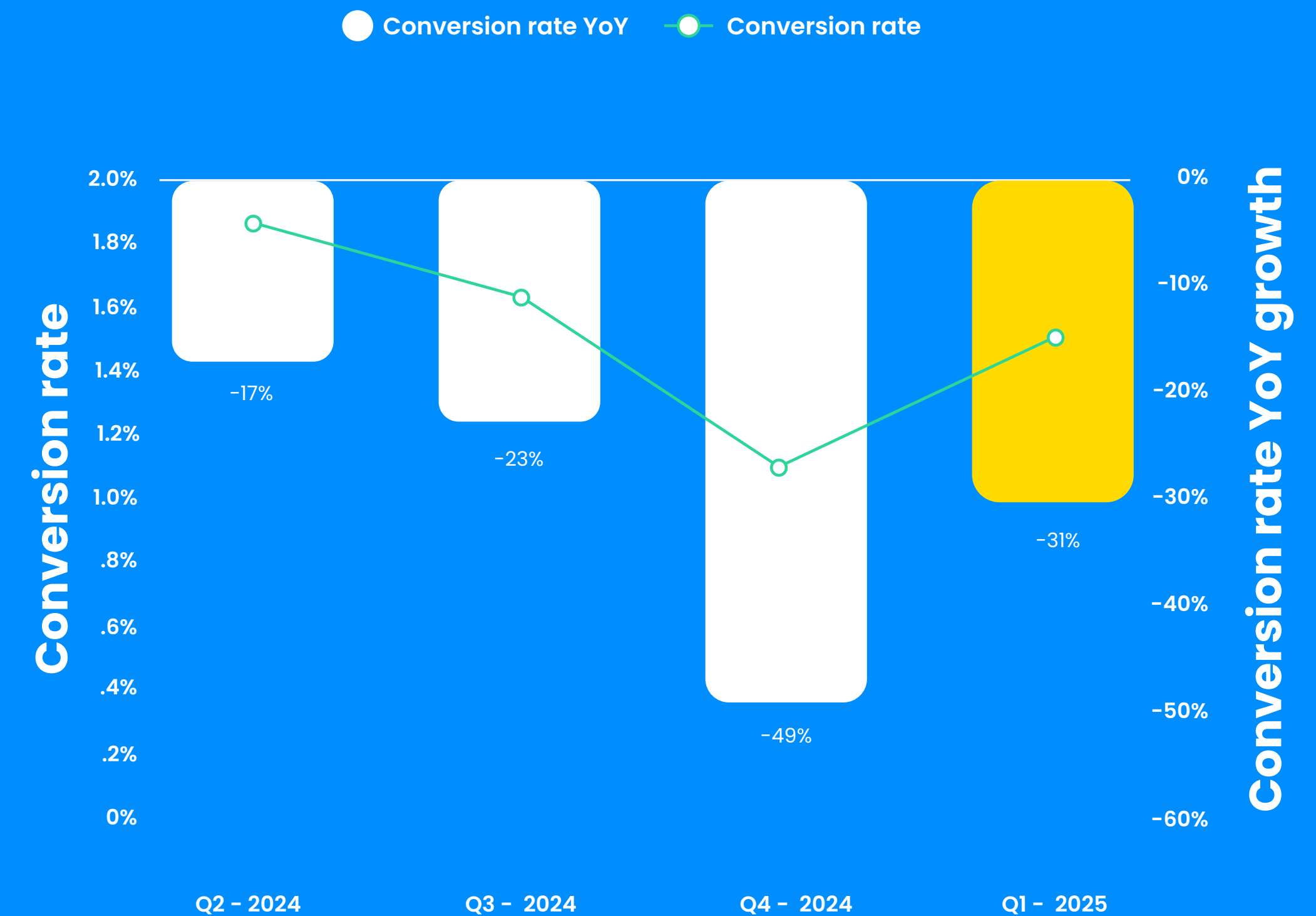
5

AOV Trends



The average order value for travel booking has been consistently over \$400 USD for the last 3 quarters.

Conversion rate trends



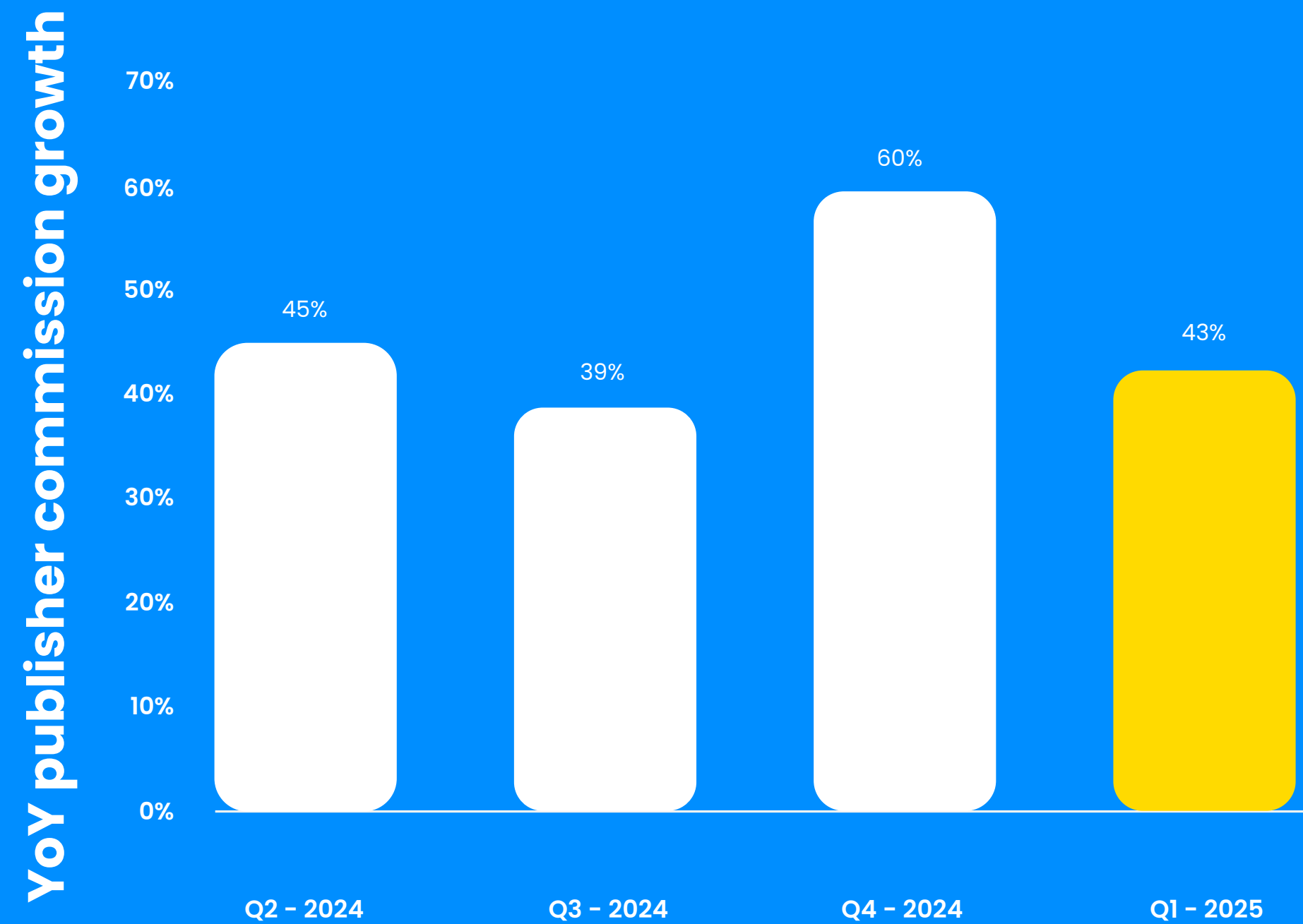
Conversion rates have been consistently declining the last 4 quarters.

Metrics are associated with approved + pending transactions from campaigns that have been on the Partnerize platform since Q3 2022.

Pub comm & Average commission rates

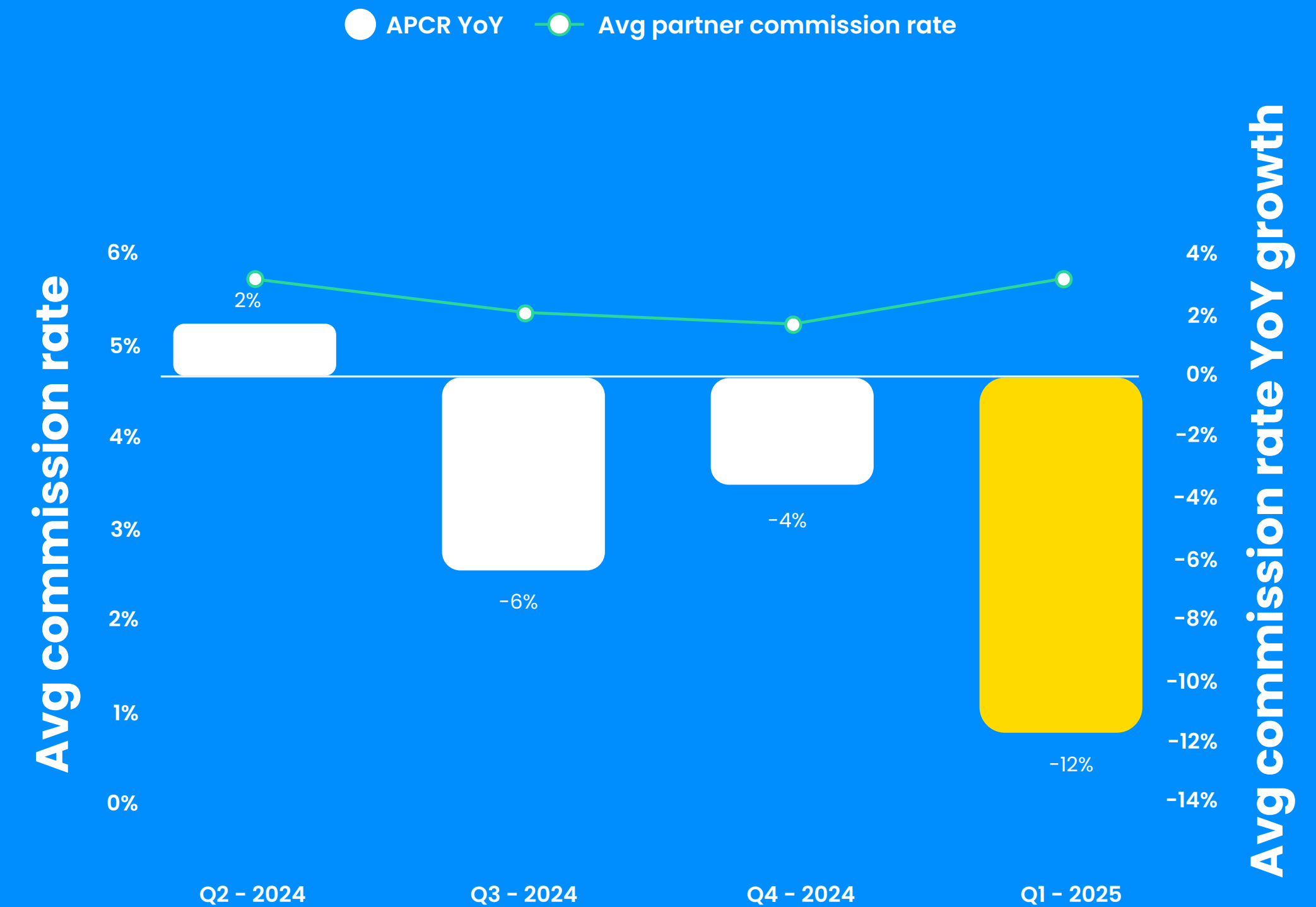
6

YoY publisher commission growth



Publisher commission grew the last 4 quarters, but saw the highest growth during Q4.

Avg publisher commission rate trends

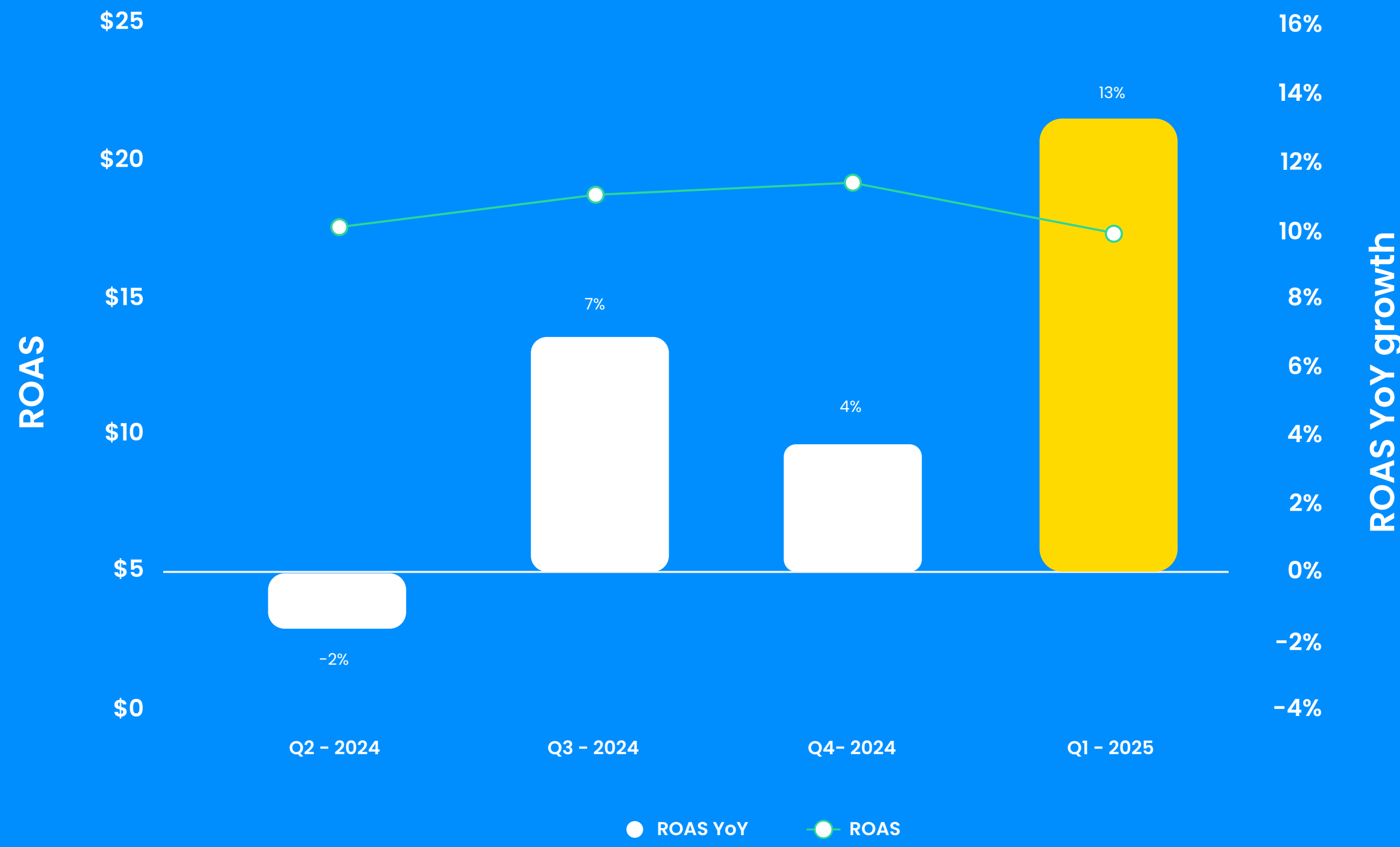


Publisher commission rates have been relatively steady, with an average of 5.7% in Q1 2025.

Metrics are associated with approved + pending transactions from campaigns that have been on the Partnerize platform since Q3 2022.

Return on ad spend growth YoY

ROAS trends

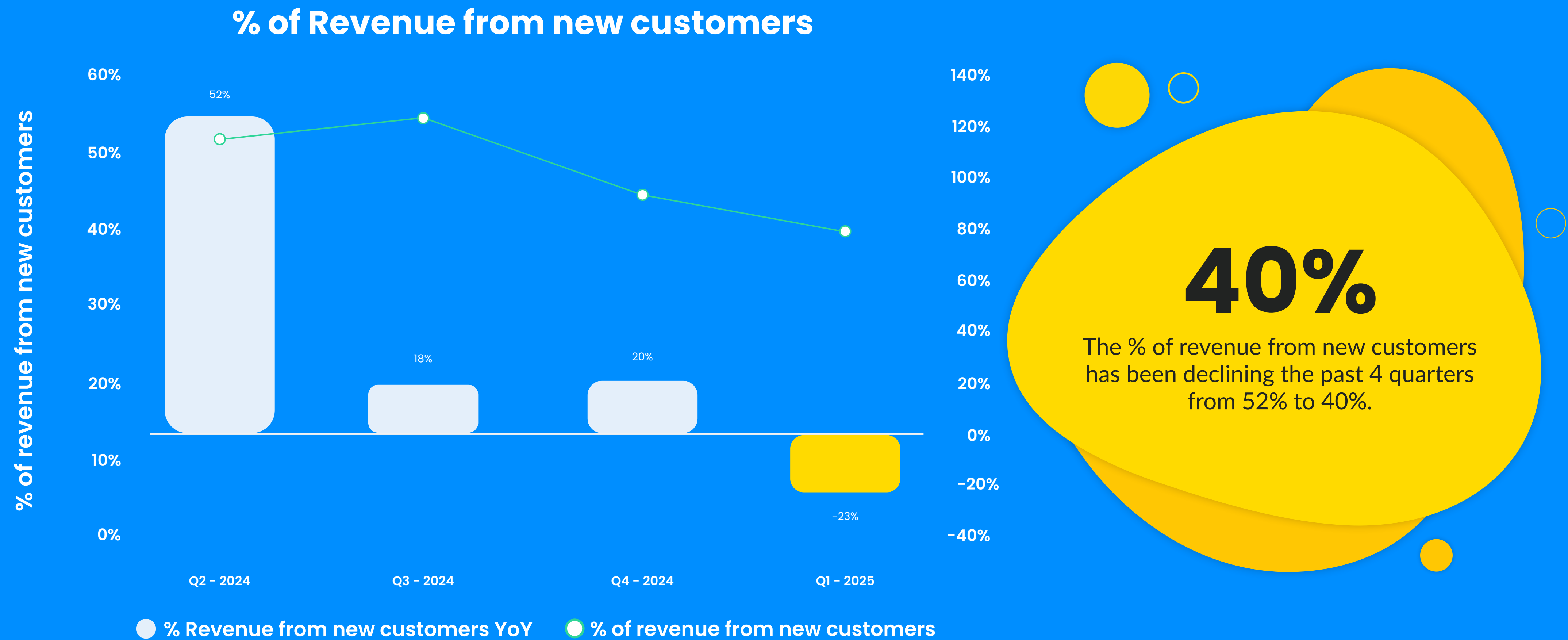


13%

In Q1, ROAS was up an impressive 13% YOY to \$17.57

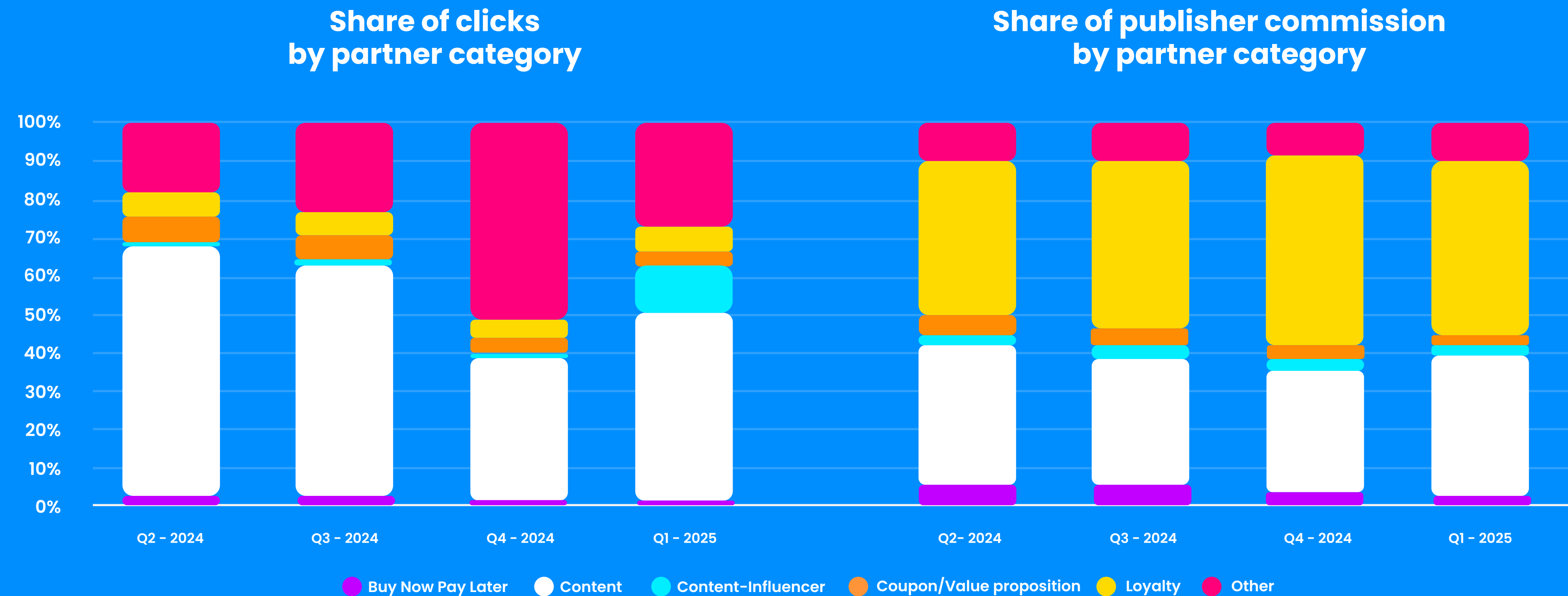
% Revenue from new customers

8



Partner category share

9



- In Q1 2025, demand for travel in the form of clicks primarily originates from content partners. But we're starting to see influencers drive traffic as well.
- However, the most partner commission (and revenue) comes from loyalty partners, with content a close second.

Metrics are associated with approved + pending transactions from campaigns that have been on the Partnerize platform since Q3 2022.

Partner category performance

10

Partner vertical group	AOV (USD)	ECPA	ROAS (USD)	% NTF
Comparison shopping services	\$267.71	1.12%	\$89.45	100%
Coupon/Value proposition	\$281.30	3.45%	\$28.98	50.61%
Buy Now Pay Later	\$292.80	4.14%	\$24.18	63.39%
Loyalty	\$457.46	5.33%	\$18.76	44.73
Content – Influencer	\$455.33	5.85%	\$17.10	\$59.62
Content	\$553.26	6.26%	\$15.98	\$38.34
Other	\$428.86	7.93%	\$12.62	\$34.30

- CSS, BNPL, Content-influencers, and coupon partners drive the highest % of new customer revenue.
 - CSS, coupon, and BNPL drive the highest ROAS given their lower commission rates.
 - .Content and content- influencer partners drive the highest AOV.
- Comparison shopping services is a category that isn't yet utilized by the travel vertical.

Metrics are associated with approved + pending transactions from campaigns that have been on the Partnerize platform since Q3 2022.



A better way to partner.

Interested in learning more
with a Partnerize expert?

Contact us at

contact@partnerize.com