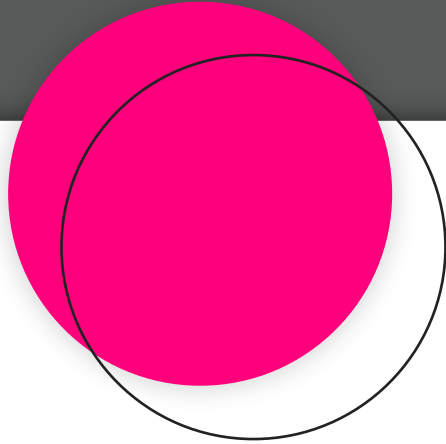




Partnerize

Partnership Growth Index™

EMEA Edition

Updated for Q1 2025

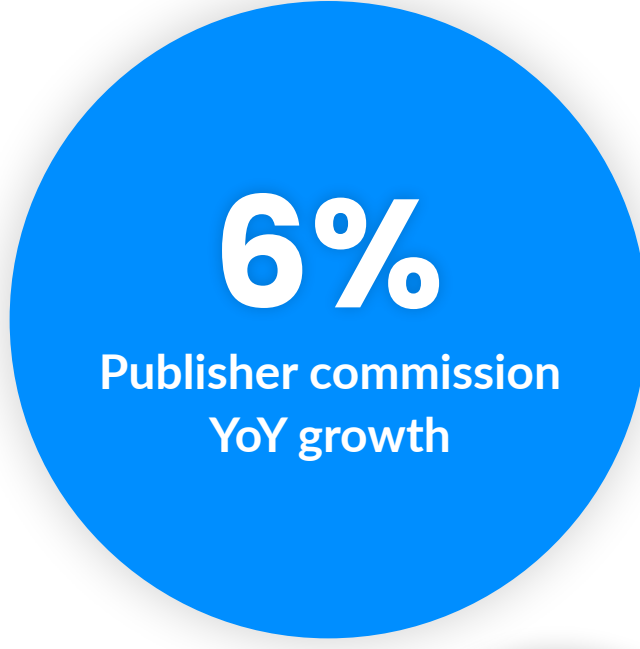
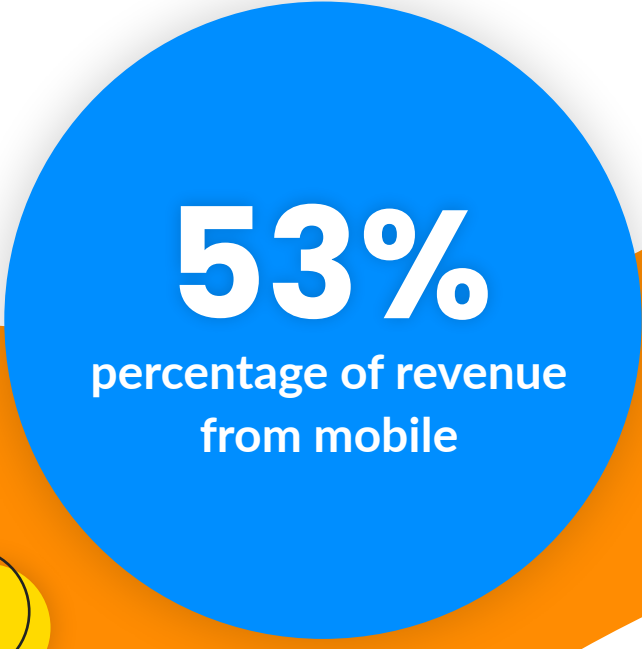
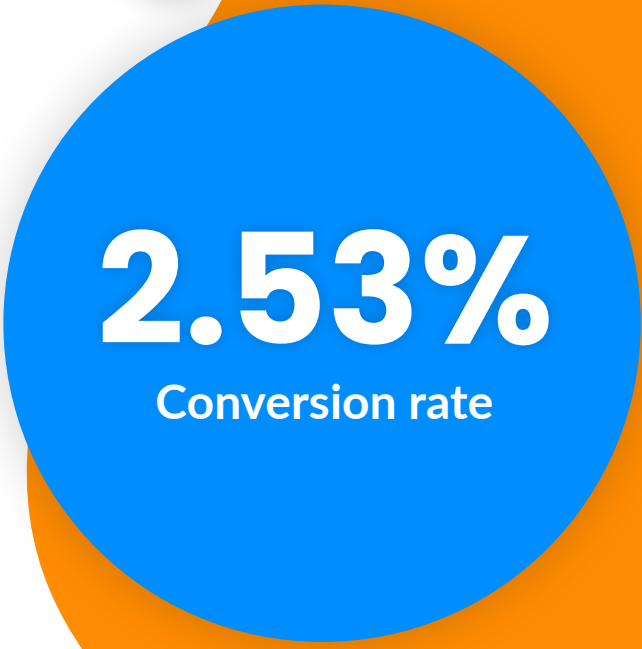
Introduction

Now, more than ever, marketers need data to serve as their guide. In response to this need, Partnerize examined key trends across regions to lend marketers insight they need to effectively benchmark, compare and optimize their partnership programs published in the Partnership Index.

The region-specific EMEA Partnership Index measures same store sales activity across all major industries directly attributable to partnerships in 2025 in comparison to the same period in 2024. EMEA brands tracked on the Partnerize platform contribute to the analysis of key trends including revenue, commission, conversion attributes and customer 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.

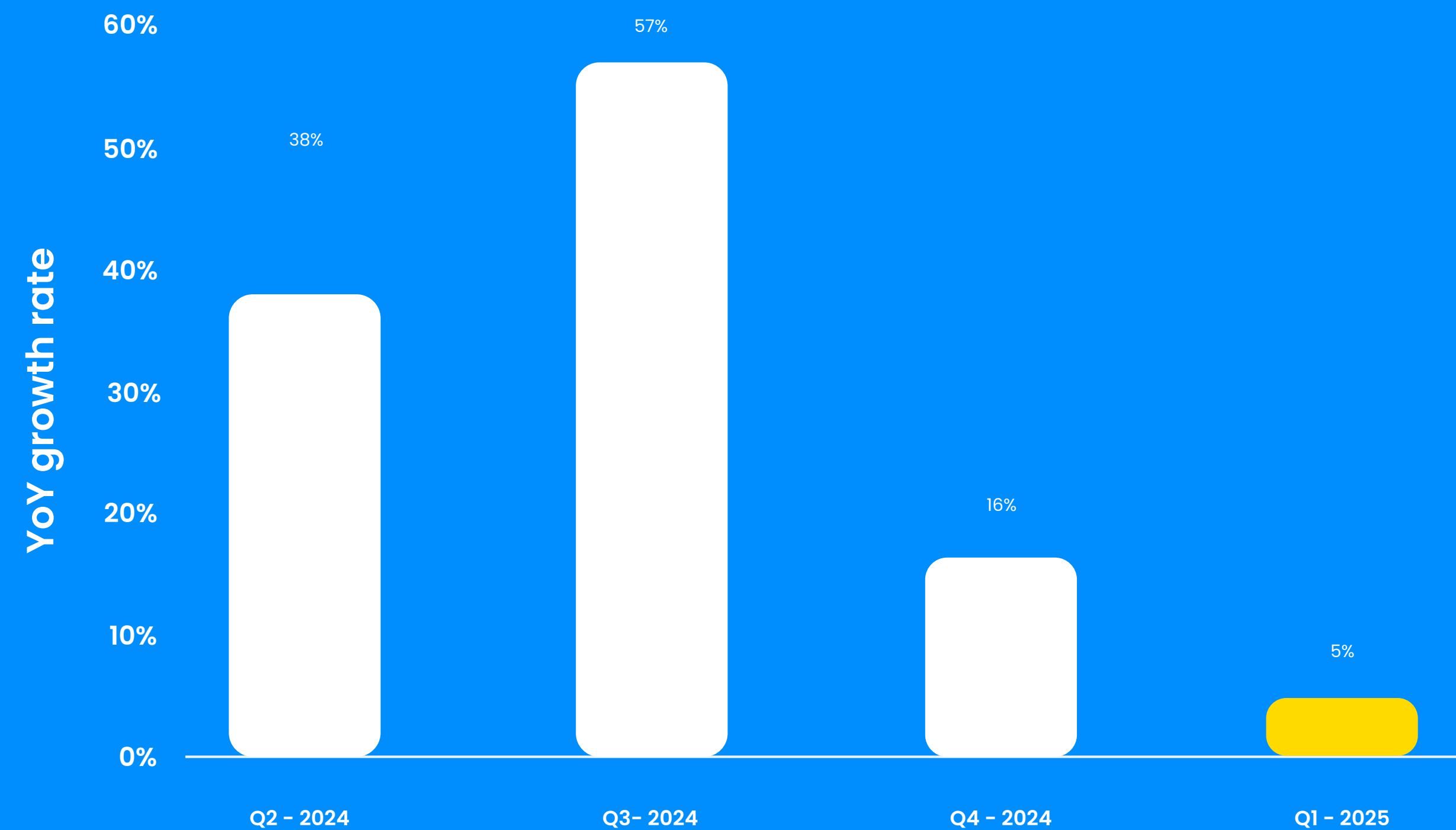
Quarterly highlights



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

Order value growth YoY

4



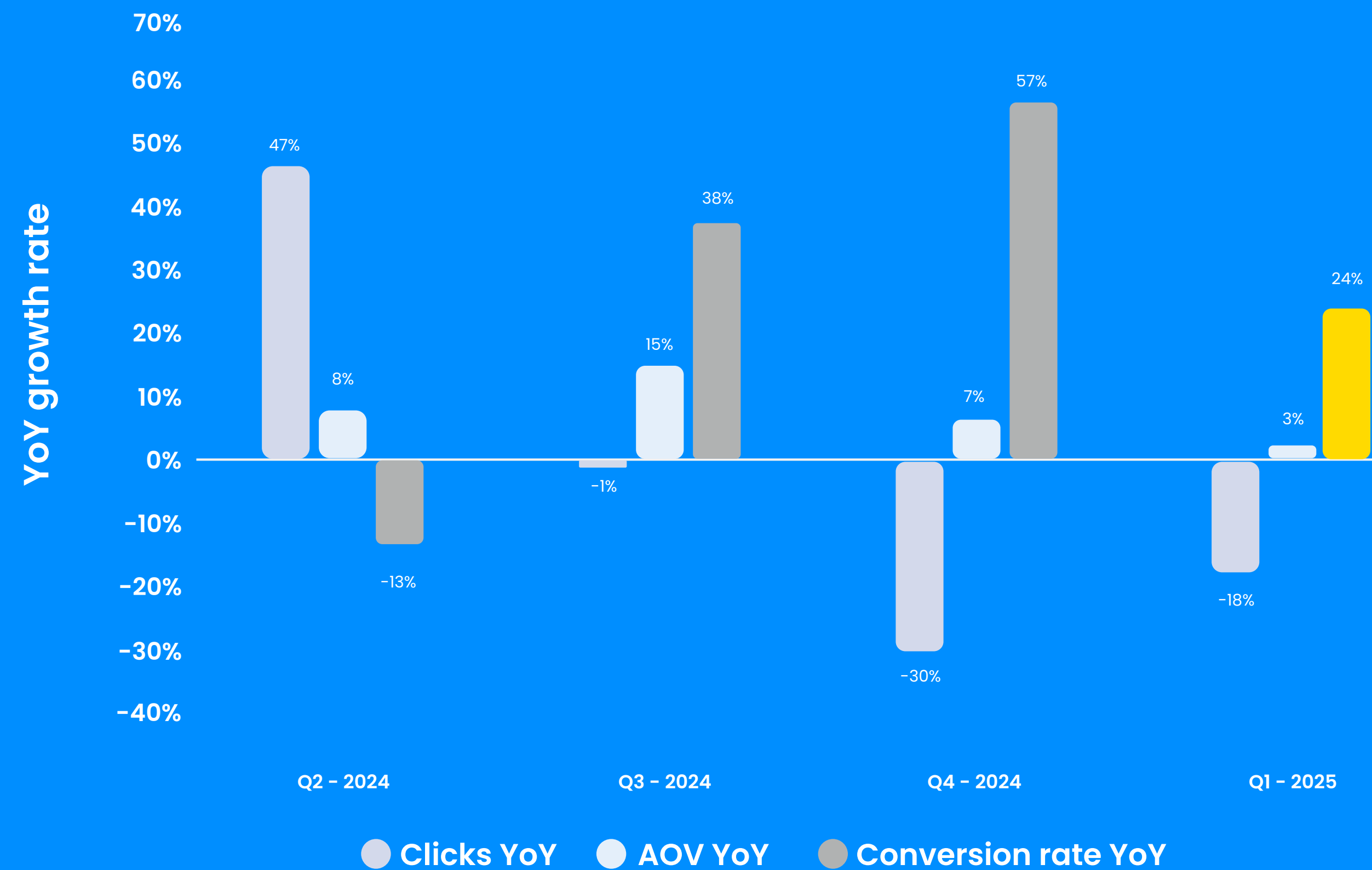
+5%

In EMEA, order value has increased 5% YoY in Q1 2025.

Drivers of quarterly growth Q1

5

Drivers of growth rate



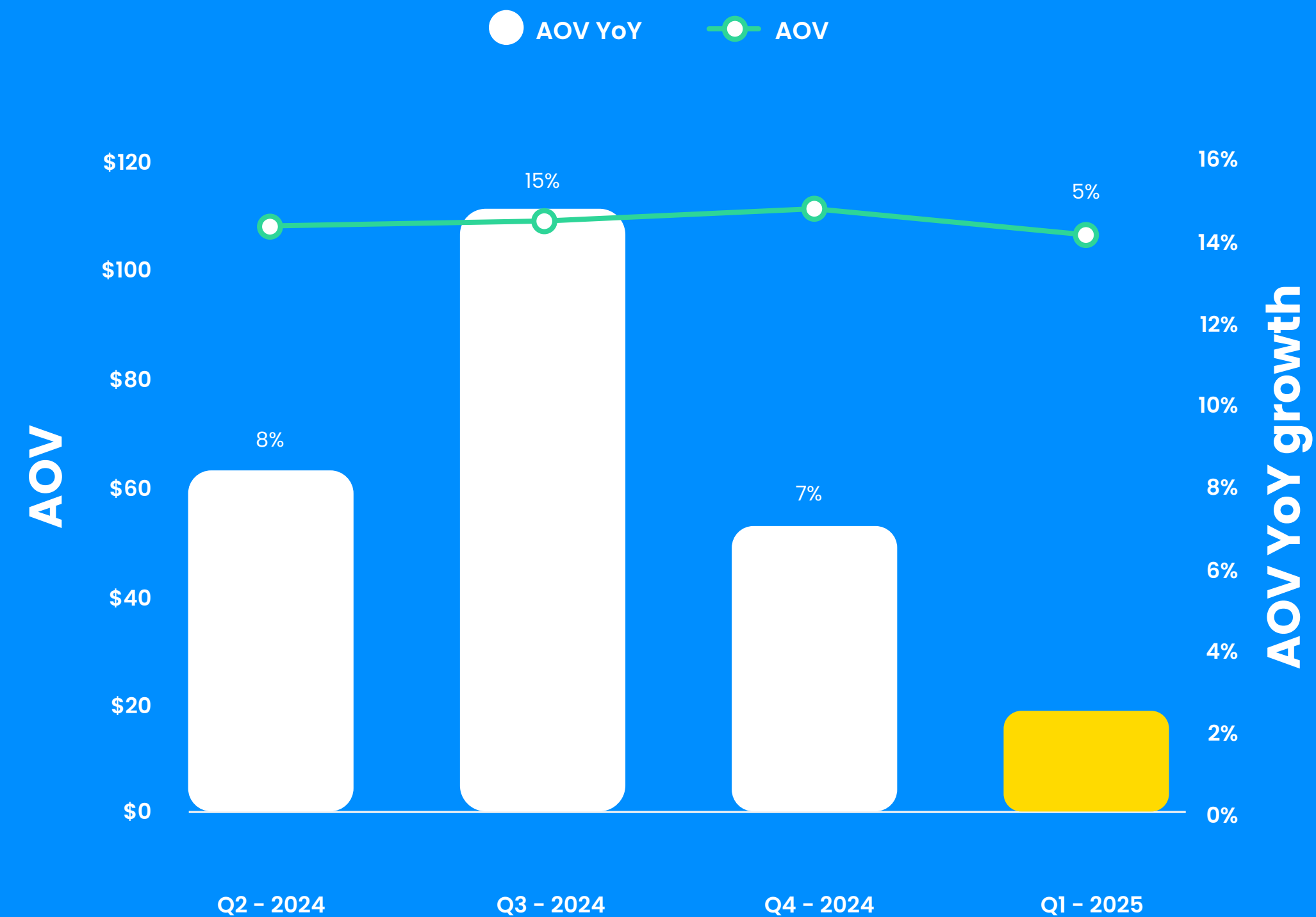
24%

Top contributors of YoY revenue growth in Q1 include a 3% YoY increase in AOV to \$106 USD. Conversion rate was up 24% while clicks were down 18% YoY.

AOV (USD) and conv rate trends

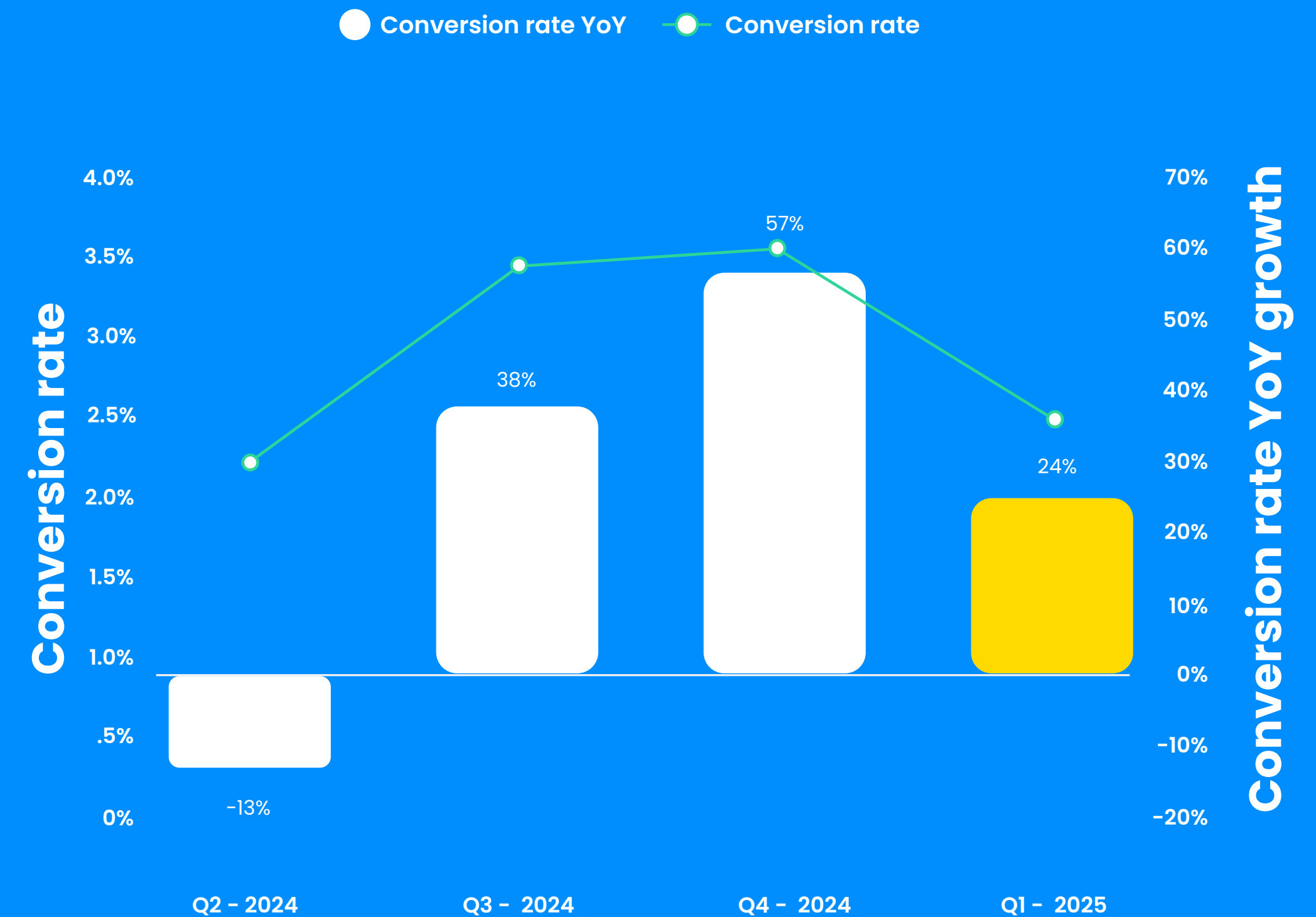
6

AOV Trends



AOV has grown 3% YoY in Q1 2025 to \$106 USD.

Conversion rate trends

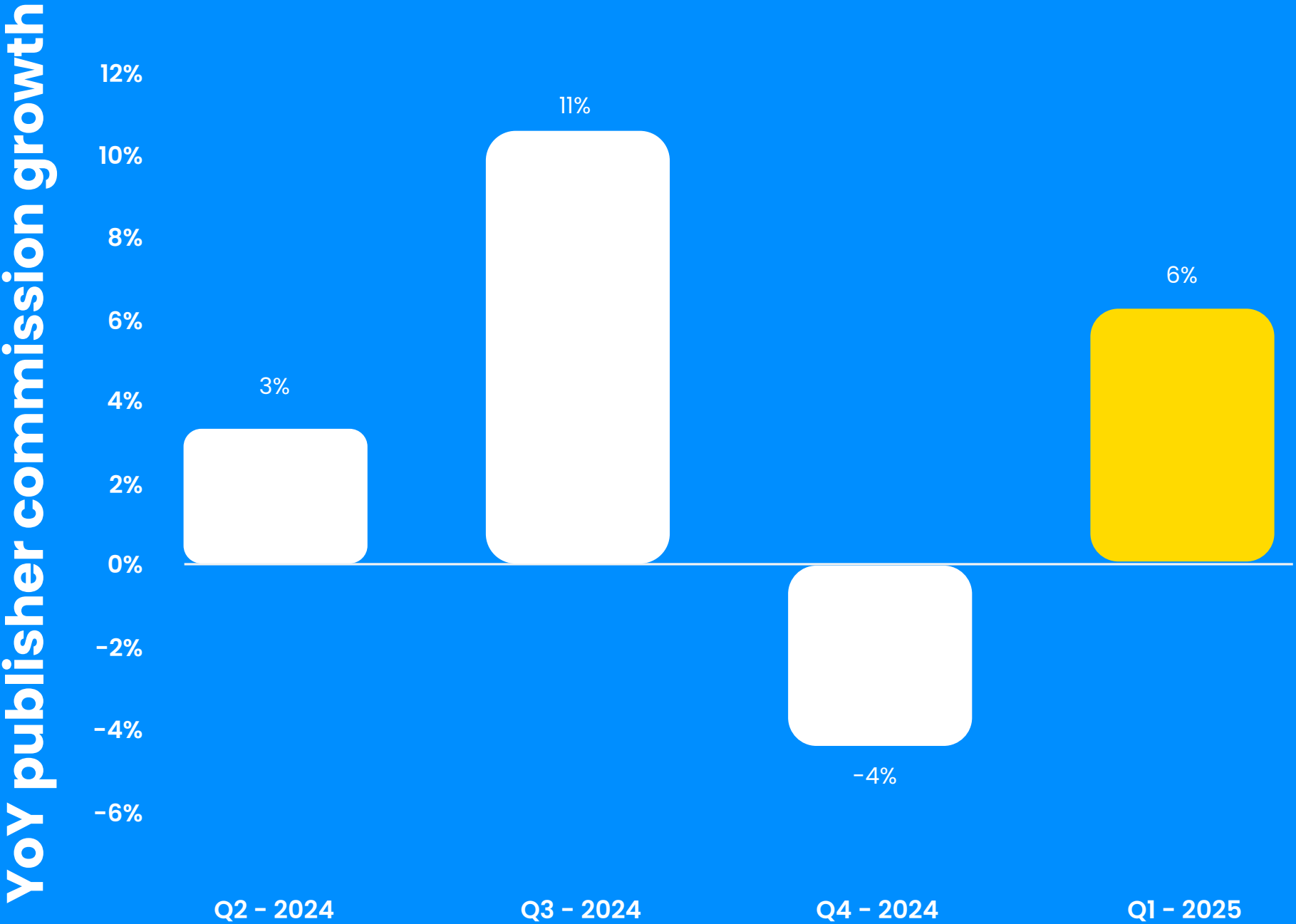


Conversion Rate in Q1 2025 was 2.53%, a 24% increase YoY.

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

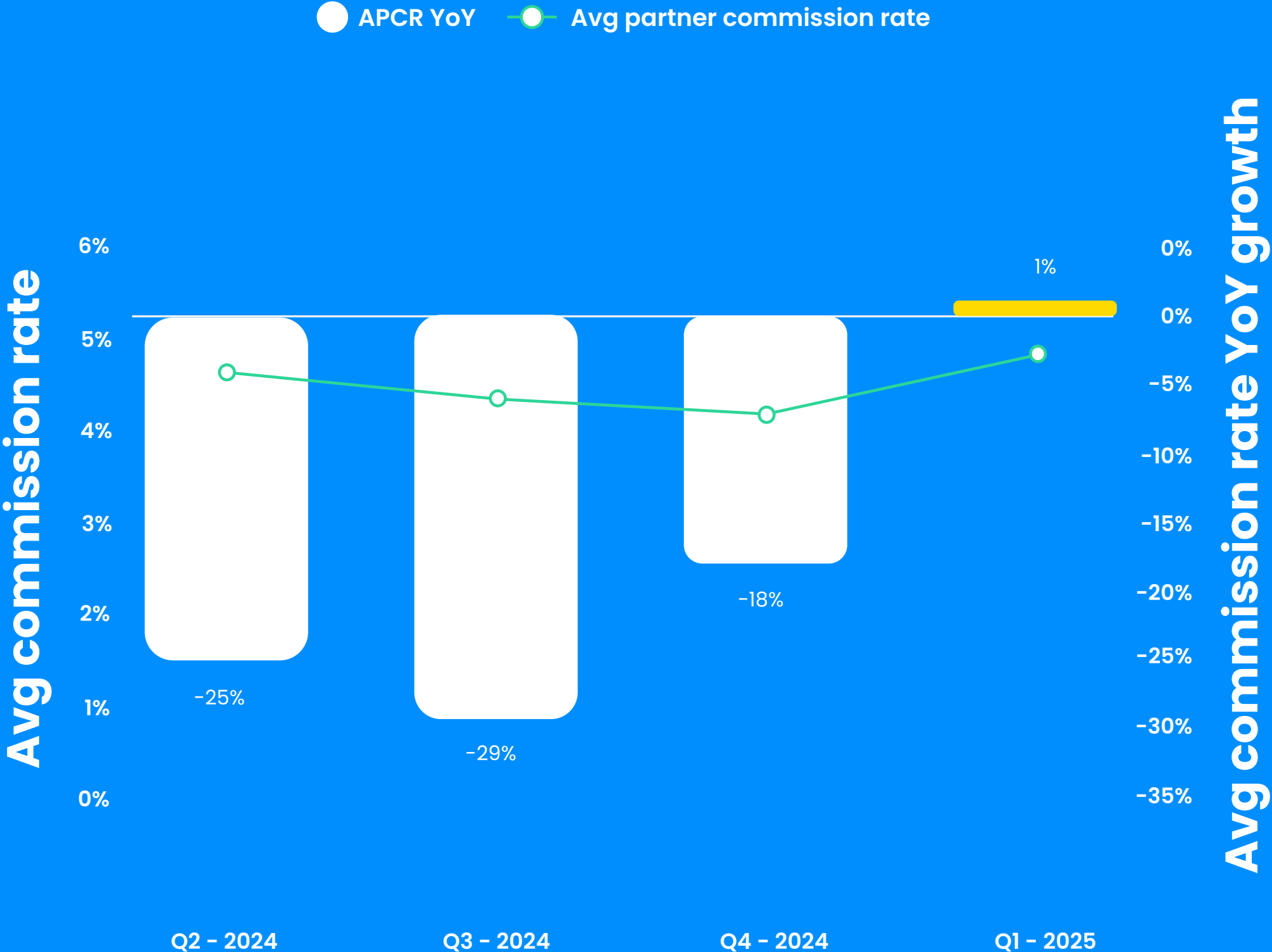
Publisher commission growth YoY

YoY publisher commission growth



Commission paid to publishers has increased 6% YoY in Q1 2025.

Avg publisher commission rate trends

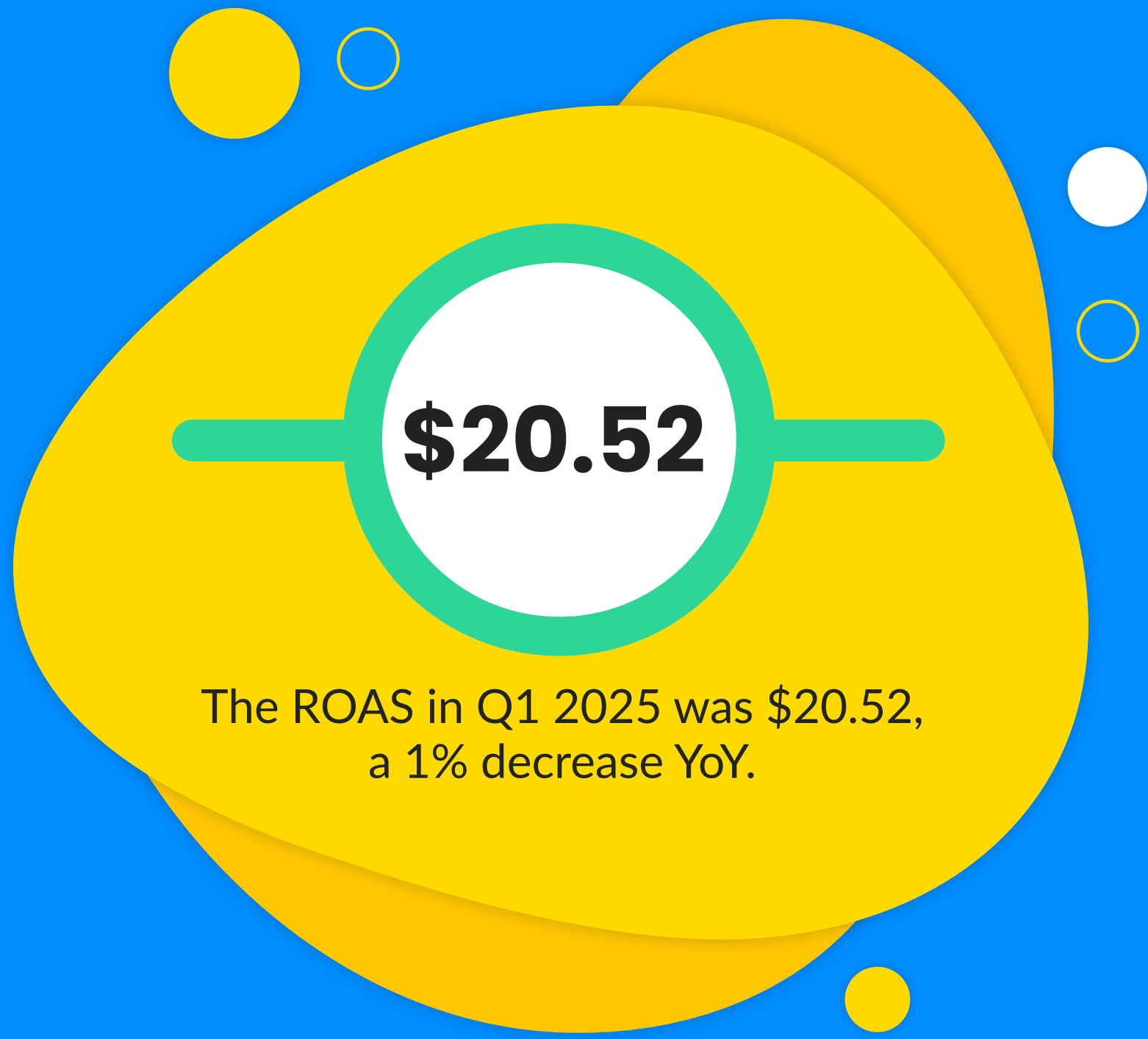
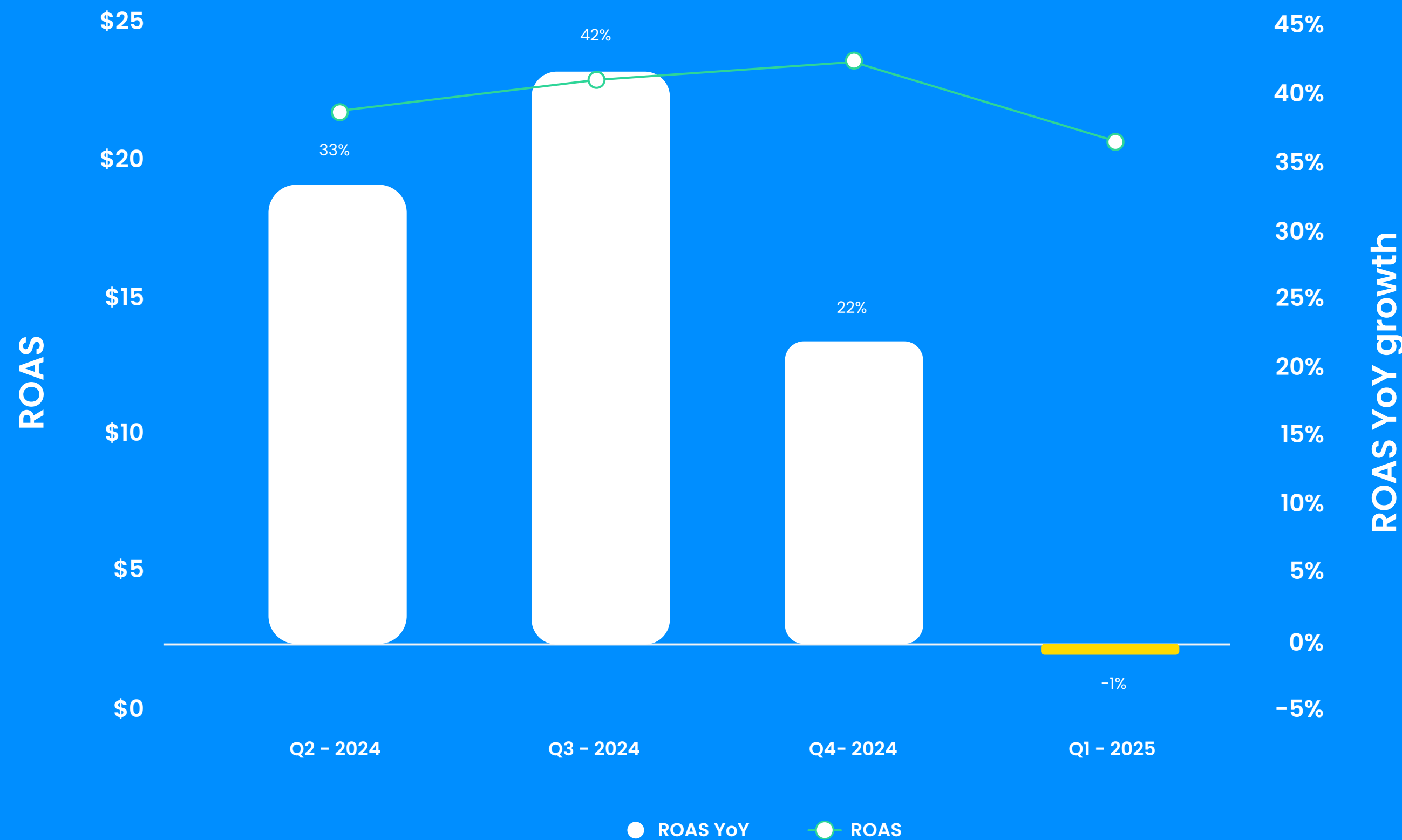


The average publisher commission rate in Q1 2025 was 4.9%, a 1% increase YoY.

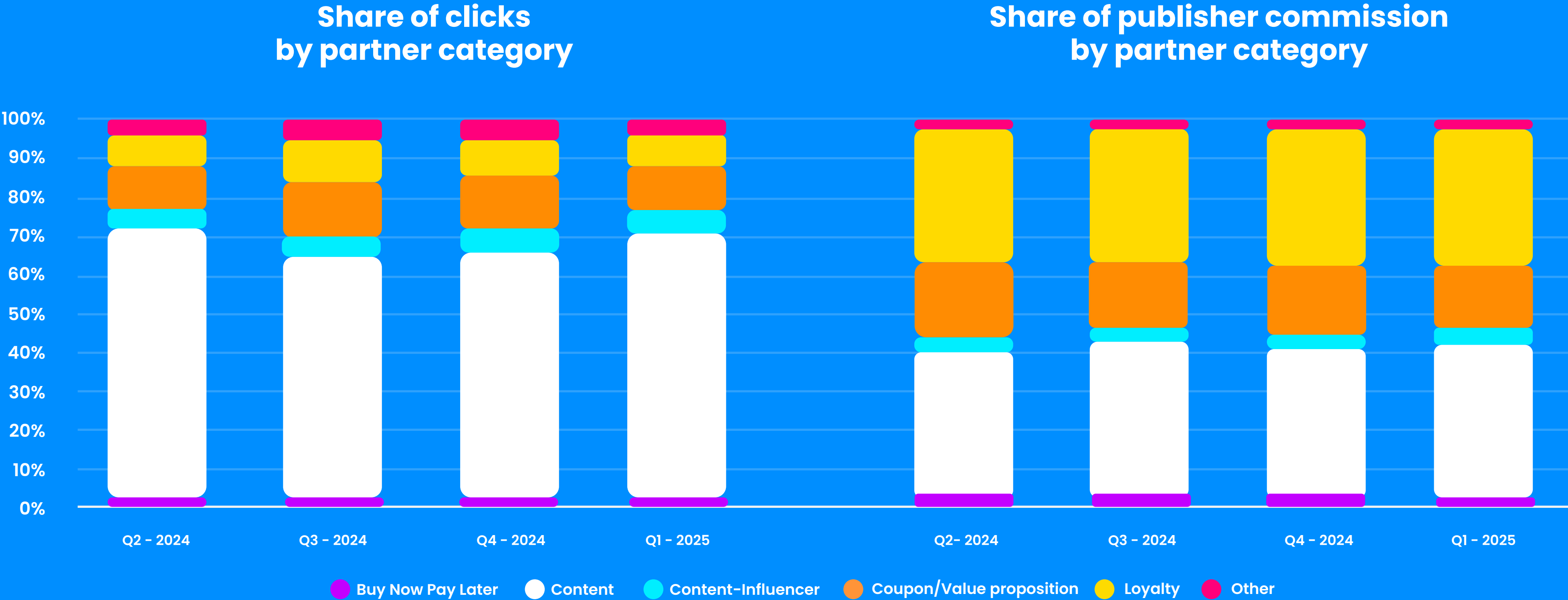
Metrics are associated with approved + pending transactions from campaigns that have been on the Partnerize platform since Q3 2022.

Return on ad spend growth YoY

ROAS trends



2025 Q1 share by partner category



- Content partners have maintained the majority share of clicks in the last 12 months.
- Loyalty and content partners receive the largest amount of publisher commission from brands
- Content, coupon, & loyalty partners drive the majority of overall revenue and new customer revenue for brands.
- Content partners' share of revenue, particularly for new customers, has increased over the last year, primarily stealing share from loyalty partners.

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

2025 Q1 share by partner category

10

Partner vertical group	AOV (USD)	ECPA	ROAS (USD)	% NTF
Buy Now Pay Later	\$127.37	4.23%	\$23.66	\$52.46
Comparison shopping services	\$86.58	4.79%	\$20.89	\$71.84
Content	\$83.66	5.27%	\$18.98	\$57.11
Content – Influencer	\$111.74	10.20%	\$9.80	\$58.94
Coupon/Value proposition	\$117.17	3.11%	\$32.12	\$56.71
Loyalty	\$115.77	3.41%	\$29.34	\$42.51
Other	\$49.62	6.29%	\$15.89	\$53.15

- On average, 42 publishers are driving clicks for retail EMEA brands and 23 are driving revenue.
 - Coupon, Loyalty & BNPL are strong in AOV
 - .BNPL, Coupon, and Loyalty have a strong ROAS given their lower APCR.
 - CSS, Content, and Influencers drive the highest % of new customer revenue.

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