Partnerize

Partnership Growth Index™

EMEA Edition

Updated for Q4 2024

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 2024 in comparison to the same period in 2023. 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

$89
Average order value (AOV)

3.74%
Conversion rate

$19.00
ROAS

42
Average click active* partners per network/campaign

5.3%
Commission rate

52%
percentage of revenue from mobile

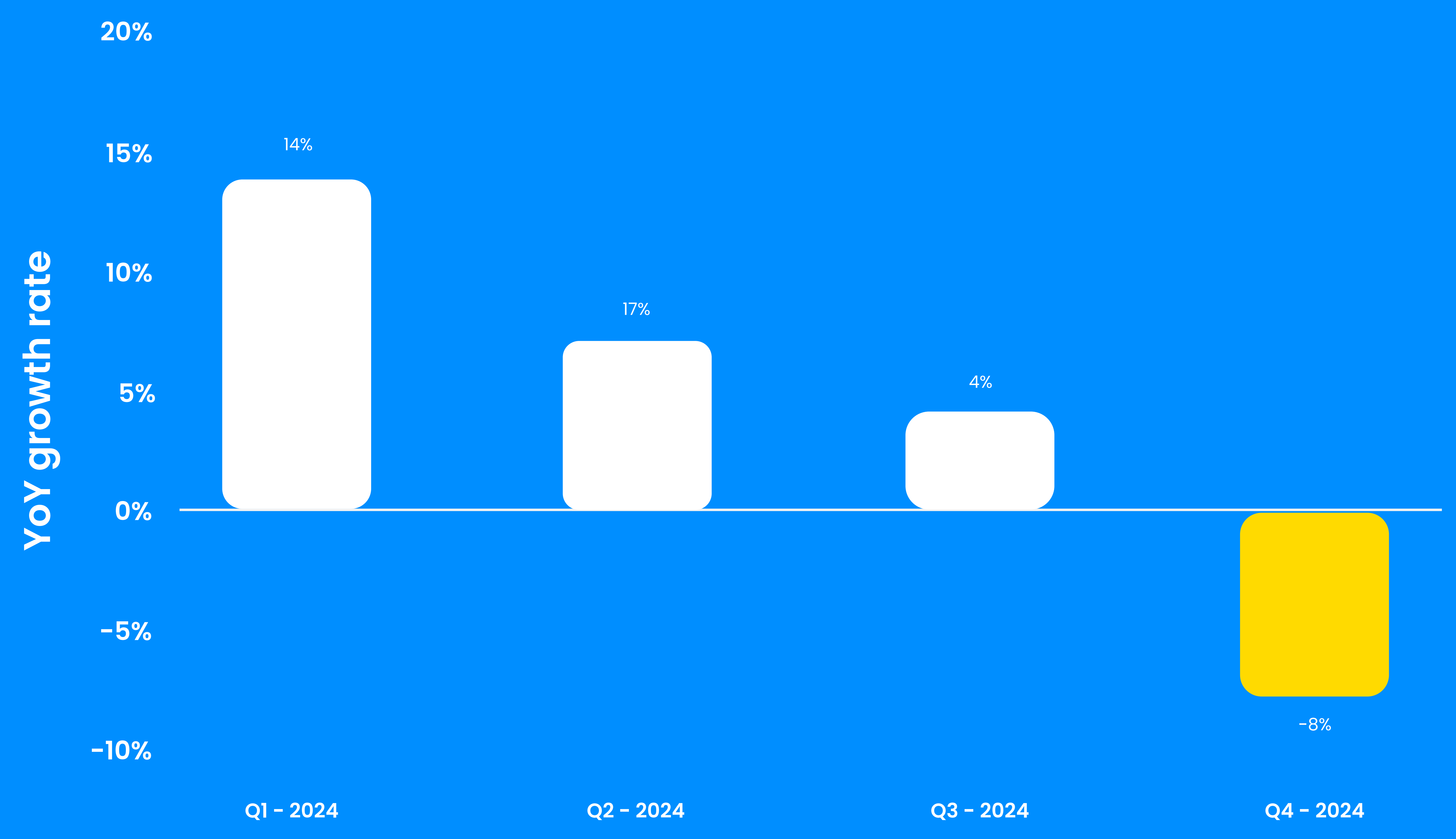
-8%
Revenue YoY growth

-21%
Publisher commission YoY growth

23
Average conversion* active partners per network/campaign

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

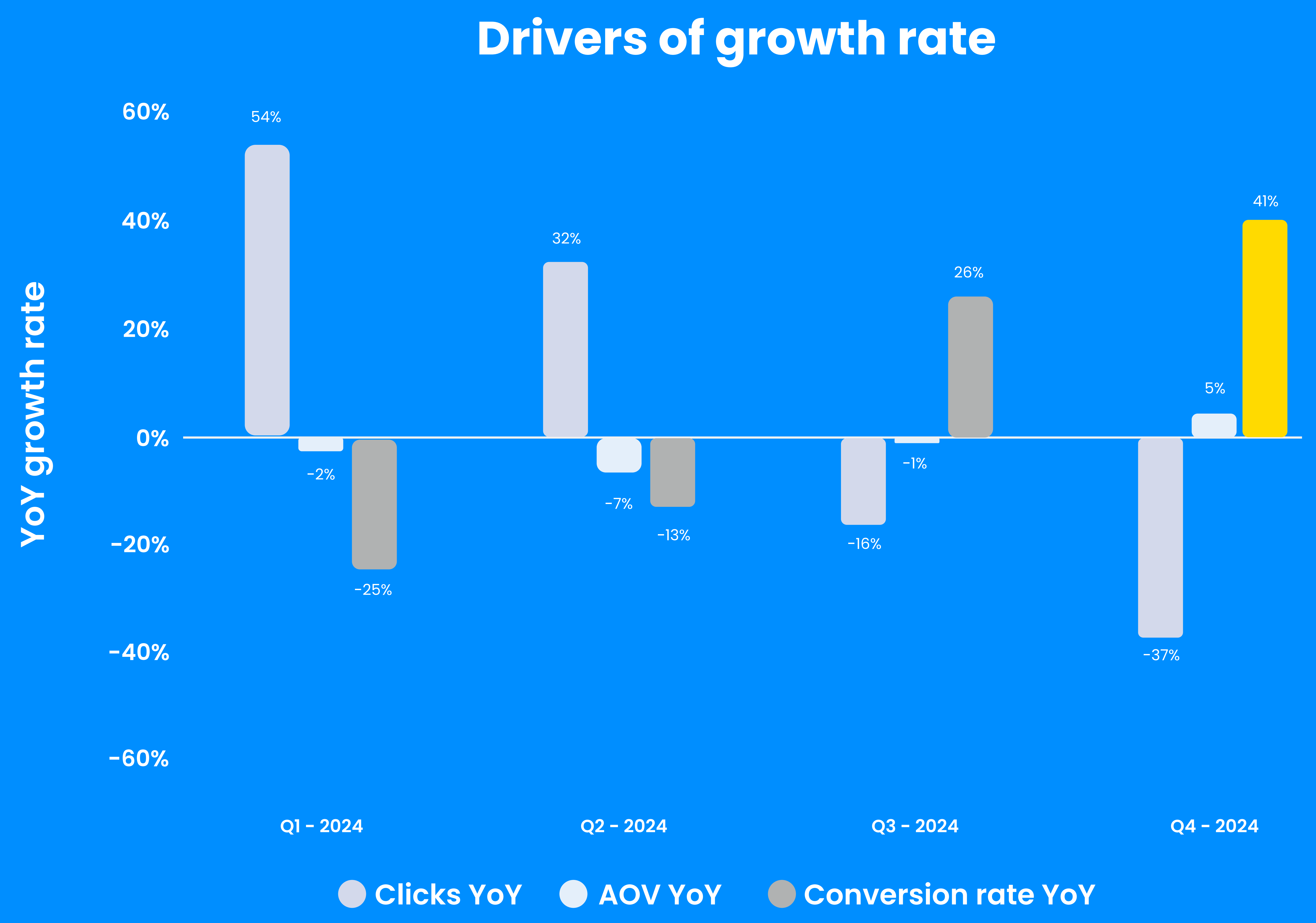
Order value growth YoY



-8%

Across all verticals in EMEA, order value has decreased 8% YoY in Q4 2024.

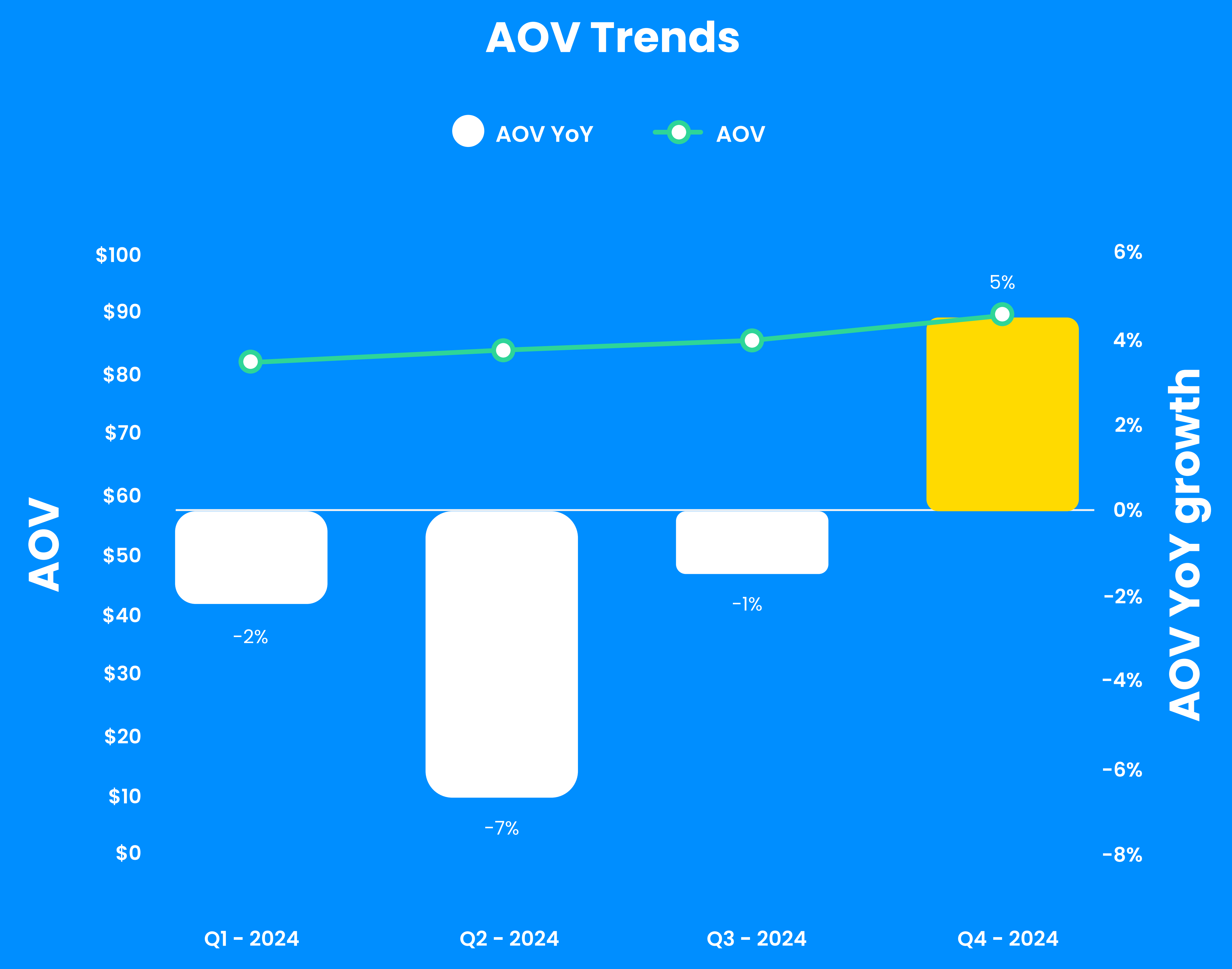
Drivers of quarterly growth Q4



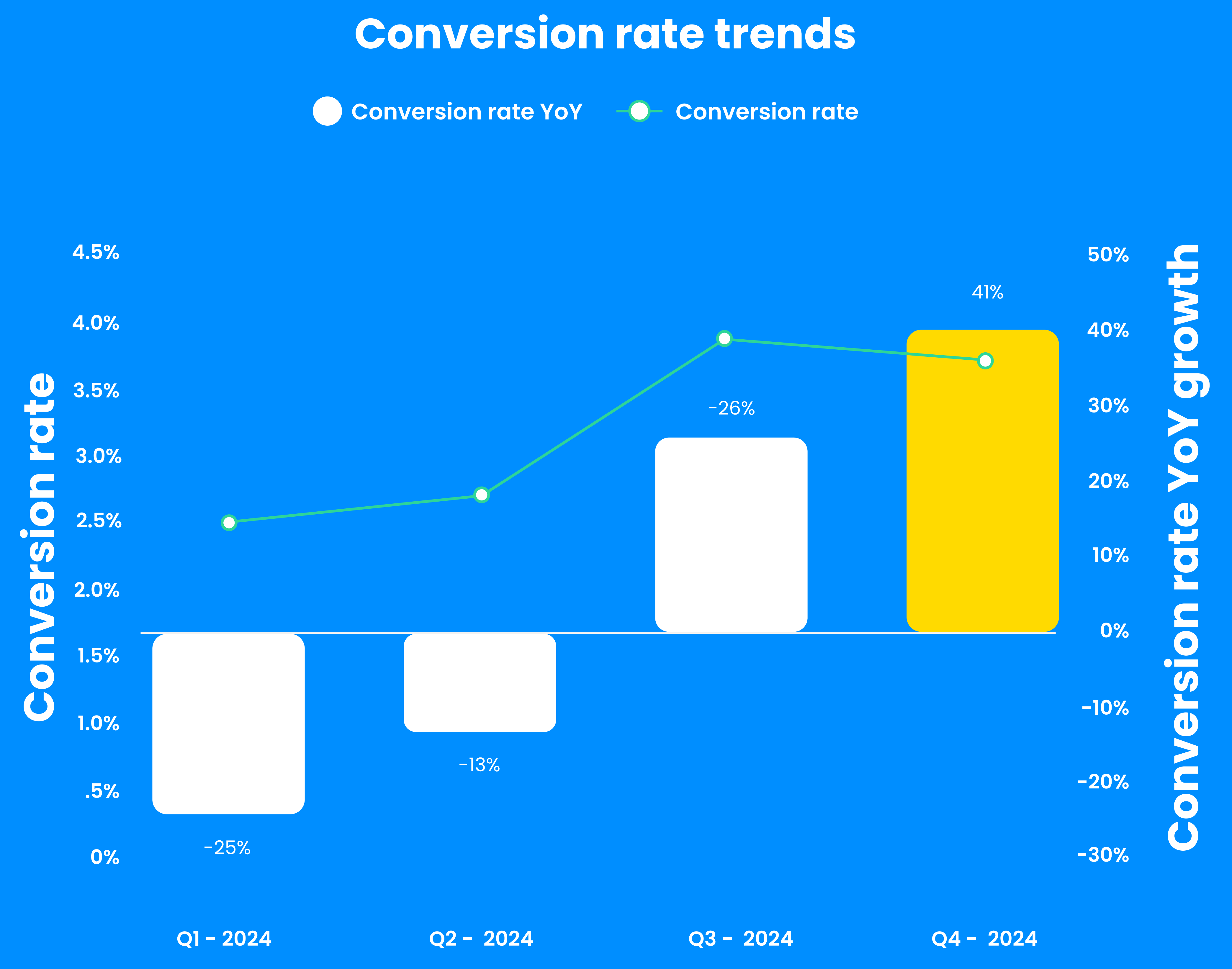
41%

Top contributors of YoY revenue growth in Q4 include a 5% YoY increase in AOV to $89 USD. Conversion Rate was up 41% while clicks were down 37% YoY.

AOV (USD) and conv rate trends



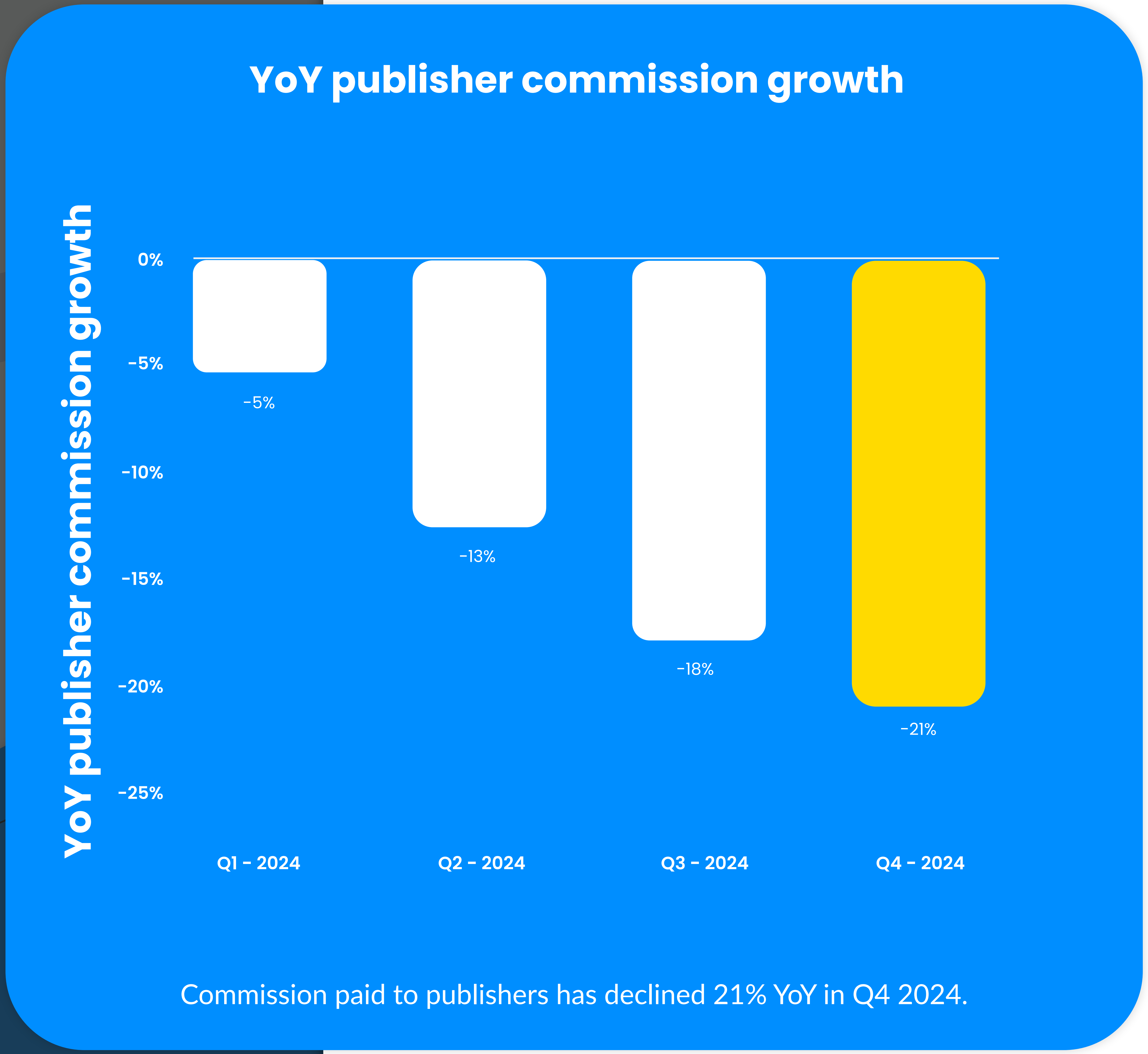
AOV has grown 5% YoY in Q4 2024 to $89 USD.

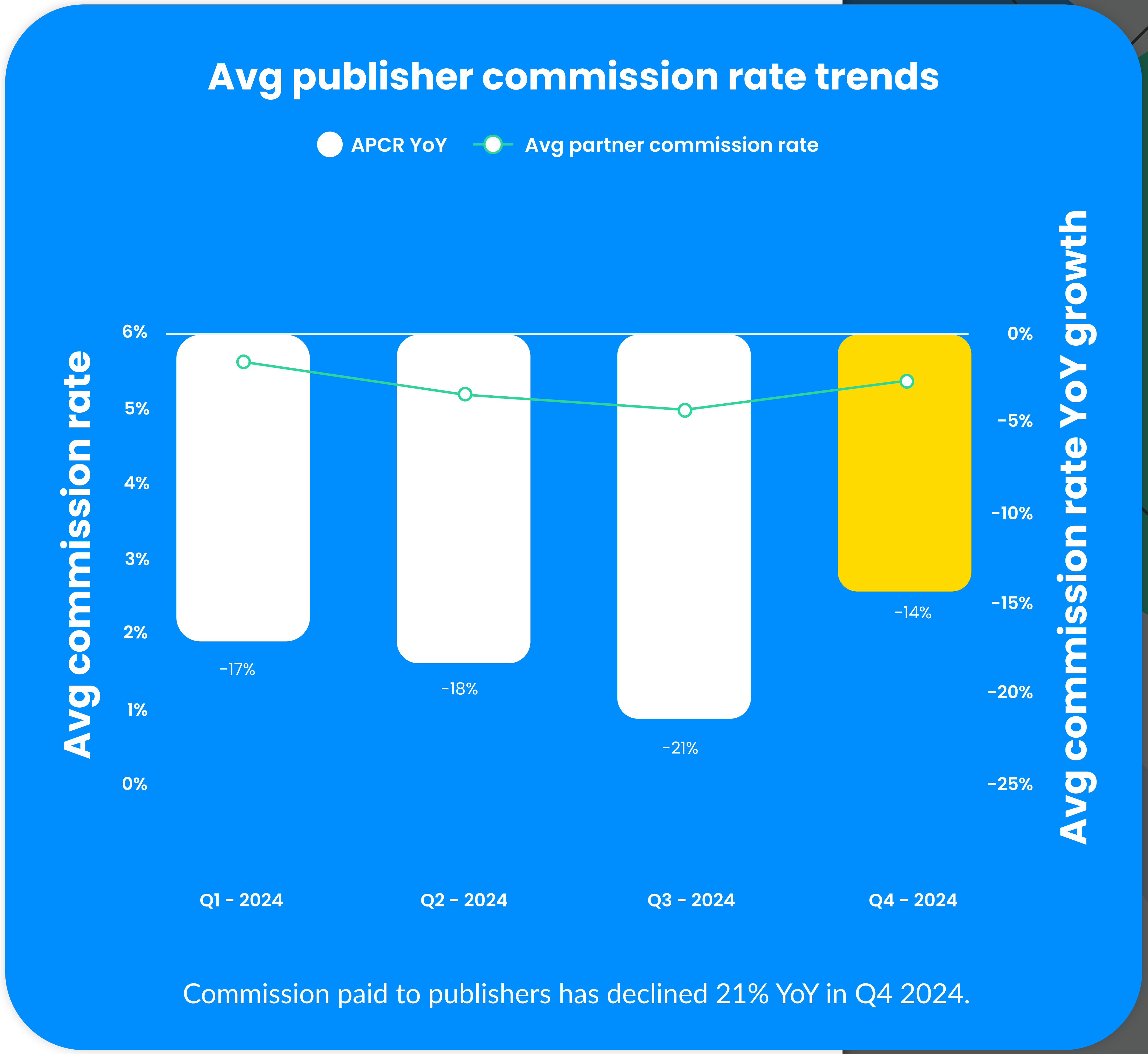


Conversion Rate in Q4 2024 was 3.74%, a 41% increase YoY.

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

Publisher commission growth YoY





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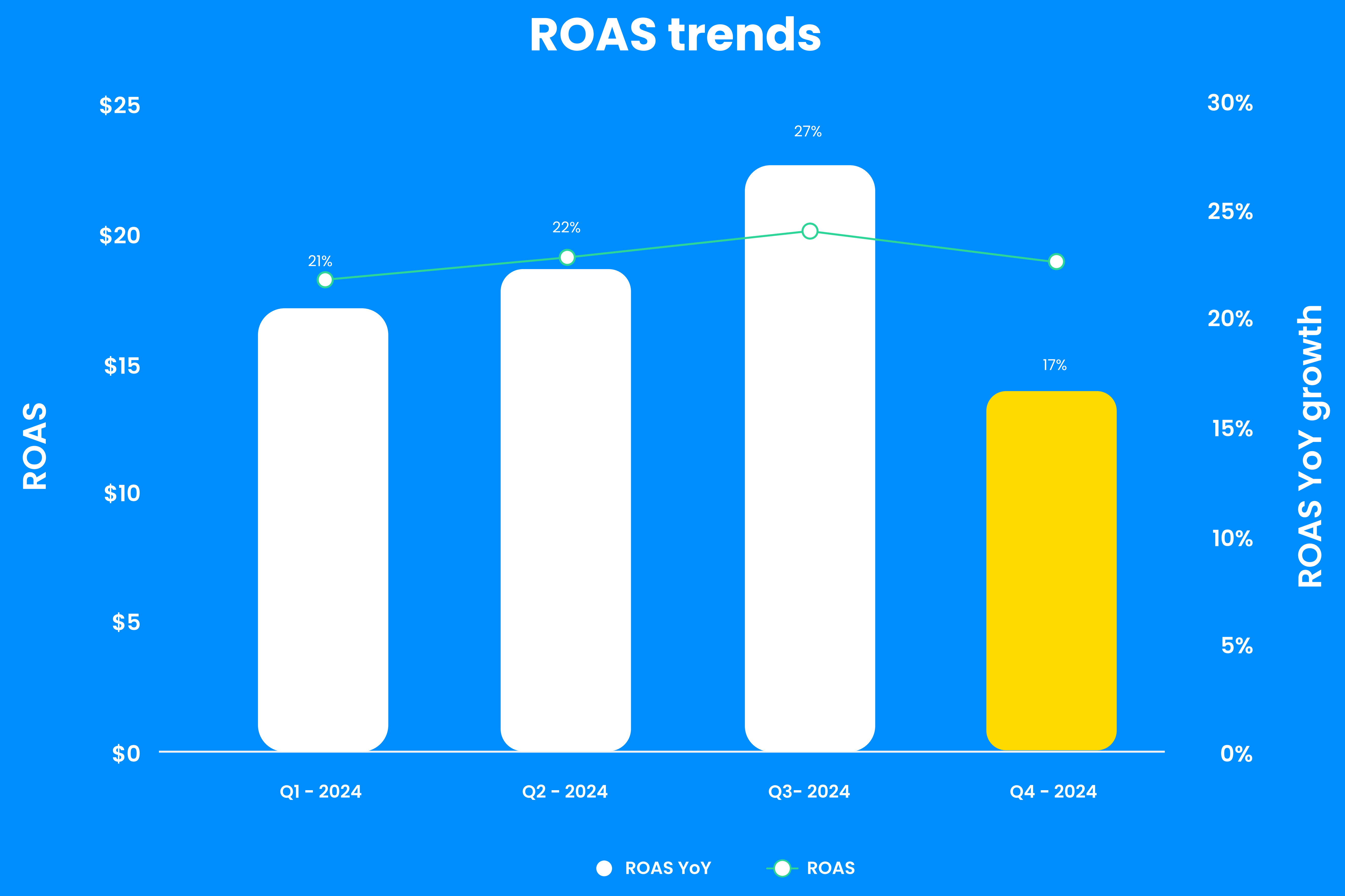
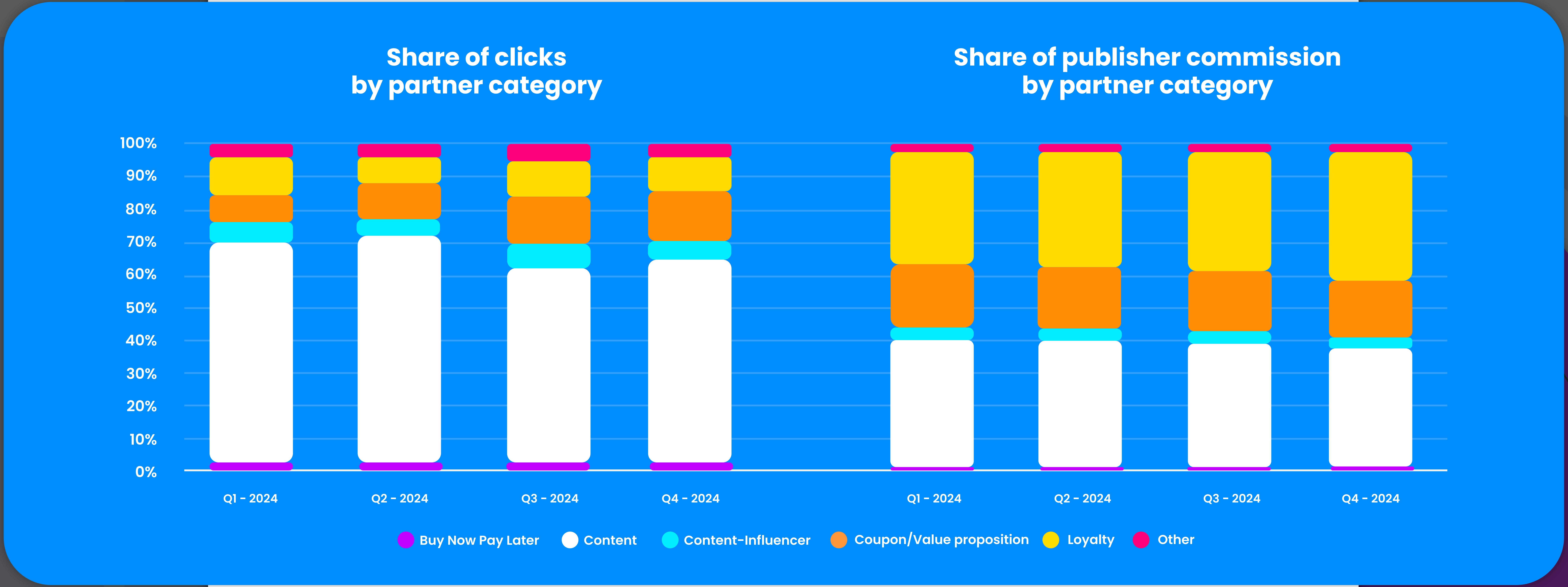
Return on ad spend growth YoY



$19.00

The ROAS in Q4 2024 was $19, a 17% increase YoY.

2024 Q4 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.

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2024 Q4 share by partner category

Partner vertical group	AOV (USD)	Conversion rate	Avg partner commission rate	ROAS (USD)	% Revenue from new customers	% Revenue from mobile
Buy Now Pay Later	$135	2.8%	4.3%	$23.51	4.3%	$23.28
Content	$100	0.7%	8.5%	$11.75	6.1%	$16.45
Content - Influencer	$115	0.6%	12.1%	$8.27	10.2%	$9.84
Coupon/Value proposition	$76	7.6%	3.9%	$25.72	3.6%	$27.79
Loyalty	$75	10.0%	4.6%	$21.95	3.8%	$26.25
Other	$80	2.0%	5.0%	$20.07	7.5%	$13.34

- Content, Influencers & BNPL are strong in AOV
- Coupon & Loyalty have a high conversion rate.
- BNPL, Coupon, Other and Loyalty have a strong ROAS given their lower APCR.
- BNPL, Content,Influencer and Coupon drive the highest % of new customer revenue.
- BNPL is used more than 80% on mobile devices.

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

Partnerize

A better way to partner.

Interested in learning more with a Partnerize expert? Contact us at contact@partnerize.com