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The US Affiliate Marketing Supplement

Affiliate Marketing Rocketing in US

2015: Affiliate Compliance

Q&A: Education

How to Master Global Expansion

Attribution, Assists and America

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FOREWORD

Affiliate marketing offers one of the most compelling and effective routes to market for brands. In order to ensure advertisers continue to embrace it, the industry needs to redouble its efforts around some core values in order to not only secure additional budget but guarantee the channel flourishes in the future.

Transparency, ethics, self-regulation and customer quality are key themes that all affiliate marketers should be focused on delivering to build trust and sustainability. As a network that has placed such tenets at the center of our business, we know that advertisers demand these as a given.

Increasingly, we're also being challenged on delivering the right type of sales to the right audience using new and established traffic sources. We also have an obligation to all corners of the industry to deliver common standards that guarantee consumers have confidence in the products and services affiliates promote. Stronger collaboration between all players in the market will both deliver this framework and offer advertisers the confidence that they are investing their marketing budgets wisely.

The industry also needs to demonstrate that in keeping with its greatest strength, it has the ability to reinvent itself. Affiliate marketing has both responded to innovation and thrived on it. In a complex, multi-device age we need to challenge the old business models. Is last-click CPA fit for purpose? By tracking affiliate sales across multiple devices are we questioning many long-standing assumptions about how publishers influence conversions? How do we unlock post-sale data, and how does this impact how we assess the value of affiliate sales?

These are fundamental questions the affiliate industry needs to address. As a robust and industrious sales channel, we've ably answered them in the past. By tackling these new challenges we have the opportunity to continue to enhance the reputation and credibility of affiliate marketing not only in the US, but all over the world.

Kevin Edwards, global client strategy director, Affiliate Window

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Affiliate Marketing is Rocketing in the United States

The exact origin of affiliate is disputed: some point towards murky beginnings in the online adult industry, while others look, perhaps optimistically, towards its patent in 1996, and a more lighthearted birthplace in William J. Tobin's PC Flowers & Gifts.

Having weathered accusations of illegitimacy and a closed doors, club-like culture among its hardcore, affiliate's mired history is testament to its nature as a continually evolving beast, and one that still tends to fly under the radar of mainstream media coverage.

That said, its presence in mainstream digital marketing is unquestionable; with Forrester predicting that the affiliate channel received \$4 billion in spend in the US last year, it seems it has certainly found a place to mature.



Year snapshot

In 2015, affiliate marketing accounts for a healthy 14% of all e-commerce purchases across the United States – a percentage point higher than last year – putting the channel on a near-level with perceptively more ‘legitimate’ channels, including email (17%) and organic search (19%), according to Custora.

By the end of the year, if stats by Forrester come true, indicating e-commerce sales in the US will be placed at \$279 billion, affiliate could be behind some \$39 billion in sales. That’s roughly \$10 back in the bank for every \$1 spent.

It’s the retail sector that’s driving the bulk of this business, with a number of niche verticals dominating the scoreboards. Out of the top 20 most popular affiliate program verticals in the States, found by AM Navigator, fashion leads with 18.7%, followed by sports and outdoor goods (14.6%) and beauty products (11.1%).

Path to maturity

Affiliate’s growth into an essential part of the US online marketing mix is in part owed to an increasing culture of openness and transparency – the result of a rising need among networks, agencies and publishers to justify the channel’s value with hard data.

Alexandra Forsch, country manager for Affiliate Window US, claims this response has also lit a fire under innovation within the channel, which has in turn sent it firmly down the path of greater adoption in more diverse mediums for monetisation, such as content.

“The release of advanced technology has been key as it enables advertisers to track and measure consumer touchpoints and influences driven by a particular publisher or promotional type.

“In response to this data, new compensation models (payment on influence or attribution) have been offered to publishers as a result of advertisers placing greater value in the long tail. Therefore, we see more bloggers expanding their monetisation strategies to include affiliate marketing.”

Trials & tribulations

A drive towards better education and technological innovation has brought the US affiliate industry forward leaps and bounds in recent years. Attribution options are continuing to expand, low-level relationships with large publishers have become commoditized, mobile publishers continue to ramp up, and cookie tracking is slowly fading from the strategy sheet.

However, its rapid development means the US affiliate industry is not without growing pains, some of which include a perception among merchants that affiliate is still a ‘make money quick’ scheme; not one that requires time, nurturing and a fostering of relationships with partners.

“There is a strong demand for informed and consultative account management, which is often overlooked. Brands still need reassurances that the affiliate channel can deliver the right types of sales for them,” observes Forsch.

Furthermore, while across the Atlantic the affiliate industry is supported by the IAB, the US equivalent is ‘mysteriously absent’, leading to issues with a lack of regulation and governance, which does nothing to quell scrutiny from the digital marketing industry at large.

This lack of representation has also seen the affiliate industry in the US take a considerable hit from the increasing prevalence of ‘Nexus Tax’, which works on the basis that affiliates are accountable for a tax on the merchant sales they influence.

This has led to the termination of hundreds of merchant programs in the states that enforce it, and ultimately risks advertisers shifting budget elsewhere. This is despite Forsch claiming enforcement outside of each state’s borders remains “ineffective”.

Where next?

Forsch claims that Affiliate Window predicted the role of the network to be “at a crossroads” in 2015, with firms deciding whether to strengthen their traditional offering through additional insights and strategic guidance, or

to evolve their products in order to compete with more established agencies.

“In fact, through Q3 we have found the industry defined by the release of advanced tracking technologies, enabling new commercial models and promotional methods, including attribution & payment on influence, online to offline,” explains Forsch, “and mobile and cross-device tracking.”

Mobile does indeed seem to be where the next chapter in the story lies. According to data from Affiliate Window, mobile conversion rates through the channel have more than doubled on smartphone since 2013 – from 0.87% to 1.8% – while traffic has leapt from around 16% to 27% in the same period.

Conversely, desktop has seen a decrease in affiliate traffic from 75% to 57%.

However, long-term gain on mobile will rely on a revision of attribution models, comments Forsch, with affiliates who drive a significant amount of their traffic via smartphones potentially losing out significantly on CPA.

“There is a direct correlation between the volume of smartphone traffic an affiliate has and the volume of cross-device sales they initiate on a smartphone,” says Forsch.

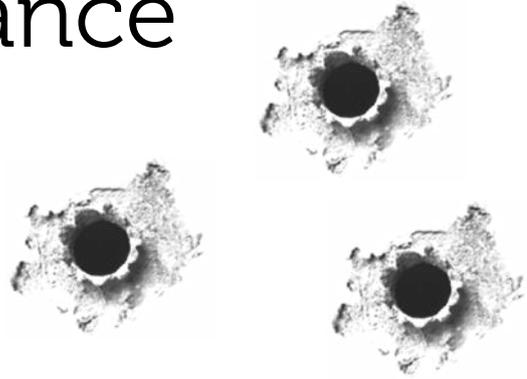
“These are sales that aren’t being tracked via network’s traditional tracking methods, so how can we expect mobile-first companies to think the CPA channel has anything to offer them?”

While the nature of evolution means that affiliate marketing has yet to reach a stable plateau – one defined by an ironclad set of industry standards – any scrutiny it receives in the meantime will only serve to stoke the flames of innovation, as marketers seek to further prove its worth with the most valuable conversions.

As such, the affiliate marketing industry has challenges to scale in the US, but you’d wager on its chances of success. 📈

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2015: The Year that Affiliate Sorts Its Compliance Conundrum?



PRIME SCENE DO NOT CROSS

Q uery a panel of affiliate marketing experts in Europe about the differences between running a program in their own continent and the US; swiftly following up the points about contrasts in agency/network remits, it won't take long for the conversation to turn to compliance and "problematic software".

'Wild, wild West' is the tagline that has haunted affiliate marketing in the States, drawing a certain degree of sensationalism in the global marketing press when a US publisher or network becomes the latest to get caught earning via unscrupulous behavior.

Despite the emergence of affiliate during the mid-1990s, the stories that continue to rear their head among all the positivity around the channel do nothing to quell the worries of merchants looking to expand their program into North America.

It's certainly worth mentioning that issues with compliance are also present in Europe, and 'blackhat' practices exist in every market. But where the US is concerned, there are certainly some interesting nuances when it comes to the parties that regulate over issues like

cookie stuffing, brand bidding and software that downloads without consent.

Support from outside

Some of the most recent cases brought against affiliates or networks in the US have been viewed as a 'crackdown' by external investigators, led mainly by the Federal Trade Commission (FTC), which invites consumers to submit complaints about some of the unsavory experiences they've had online.

But recent issues have gone even higher than the FTC; right to the top, in fact, with specialist reports on malvertising from the Senate Homeland Security Commission being followed by President Obama's call for stricter data protection laws for America's online population.

However, with such parties operating at very top line of inquiry, the onus is on the industry's own members to ensure that everyday incidents aren't going undetected.

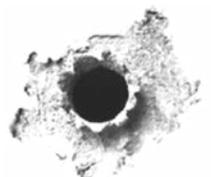
Conversations with Alexandra Forsch, US country manager at Affiliate Window, certainly outline the nature of measures that

networks must have in lieu of solid guidelines for outlining 'bad practice'.

"We have moved to include brand-bidding detection as part of our core service offering, carrying out daily monitoring to proactively alert clients of any activity outside of their T&Cs and to further ensure we take appropriate action from portfolio level.

"We also disallow any form of automatic redirection or alteration of browsing experience. When publishers work with distribution partners, they accept full responsibility for all tracked activity and are required to clearly outline these relationships in their profiles, their click reference and/or referring URLs."

While this level of protection should ultimately provide peace of mind for the merchant, it's not considered commonplace. In fact, Forsch believes that at least some of worries over compliance can be attributed to the level of inconsistency in networks monitoring bad practices - their haphazard nature allowing some crimes to go unnoticed in a self-regulated channel.





CRIME SCENE DO NOT CROSS CRIME SCENE DO NOT CROSS CRIME SCENE DO NOT

If ever there was a story which stressed the divide in attitudes to compliance, it was the \$11.9 million case brought against affiliate network LeadClick Media for its hiring of fake news sites to promote products with “deceptive weight loss claims”. Upon receiving its orders in 2015, the network was also slammed for taking payment for free trials of products and making subscriptions hard for users to cancel.

Making strides

While the channel awaits much sturdier methods of highlighting wrongdoings, bureaus and associations outside of the US have found that a greater range of resources, guides and standards can do wonders for a market’s reputation, making it easier to determine which groups are playing by the rulebook – simply because one exists.

Europe’s Internet Advertising Bureau, for instance, which oversees affiliate practices in 28 member nations, has guidelines drilling into niche areas like downloadable software to draw a clear line between right

and wrong. Numerous articles have drawn into question whether the same level of catering is, and should be, available in the US through the Performance Marketing Association (PMA).

PerformanceIN’s own line of inquiry had several US commentators outline that having key stakeholders agree on guidelines for certain practices has proven hard from the outset, even if some of the known issues appear to invite little in the way of contention.

Analysis of the FTC’s action in 2014 from investigative tech group MediaThirst found plenty of cases relating to unsubstantiated claims from merchants, adware, false warnings about “limited-time offers” and other such promotions.

Away from the wording of advertorial, the usage of toolbars is a problem which has crept up in recent years, with users urged to check the functions of anything they download. This is with the view of avoiding issues like cookie stuffing: the nefarious tactic which allowed known affiliate marketers Shawn Hogan and Brian Dunning to rack up an estimated \$35 million in

commission for driving sales to eBay until their imprisonment in 2014.

Forsch highlights that the PMA is “racing” to publish guidelines to ensure that its members stay on the right side of the FTC while initial investigations take place. In the meantime, aside from selecting a reliable network, it’s noted that publisher recruitment should be examined with scrutiny.

The advice from some corners is for merchants to work with fewer, better-quality sites, which, even when taking compliance out of the equation, could result in better partnerships with affiliates and a better-run program.

While the high-level intervention was always going to draw a certain amount of concern about the issues at hand, the saving grace is the speed at which actions are being taken by the government, industry bodies and affiliate networks to ensure we may be looking at a much cleaner, transparent channel come 2020. 📌

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Q&A: Education

Research suggests that affiliate marketing is one of the most sought-after skills among marketers in general. How will the channel conquer its education crisis?

Is the US industry's progress hindered by a lack of education into the affiliate channel?

Alec McNees: The answer here is simple... yes! Working for a company founded in the UK, there are very obvious differences between the two markets. Probably the most noticeable one being that affiliate marketing is rarely aligned with the strategy of senior management, and is not a focus of VP-level marketers.

James Boden: While the US industry is continually growing, it seems that this growth is somewhat hindered by a pre-existing negative stigma about the channel. Part of this negative preconception is due to the fact that the channel is often used purely as a last-minute 'volume driver', which diminishes the true value of affiliates. Without further education on this value, as well as the commercial benefits, it will be hard to see the industry utilized to its full ability.

James Little: Yes – I think it is. Have you ever met anyone that got into affiliate marketing because they learnt about it at college? It's also so vast and complex compared to the EU. There are hundreds of affiliate networks and sub-networks out there, so to manage a program successfully you really need to know what you are doing or it could cost you thousands.

From what you know, is the problem as bad as it is in the EU?

AM: To my knowledge, the problem is worse in the US. A partner at a major European affiliate network recently told me that doing business in the US is like "the wild,

wild West". His thoughts aligned with mine in that, typically, those managing affiliate programs in the US aren't as seasoned in the industry, or in digital marketing in general.

JL: I think there is a problem in the EU too, don't get me wrong. But at least some of the affiliate networks are addressing this. The other issue is that because the market is bigger in the US it perhaps attracts the wrong attention, so there is a lot more fraud and perhaps not enough adequate systems to monitor it.

What can we do to solve this?

AM: There needs to be greater involvement from upper management. Beyond that, upper management also needs to be better-educated. I encourage all publishers and networks to bring directors and VPs into the conversation more often. From this perspective, ask yourself: "When was the last time I had a conversation with the VP of e-commerce or VP of Marketing at this advertiser?" From the advertisers' perspective, ask yourself: "How often do I meet with my boss and my boss's boss to discuss my strategies and partnerships?" Once there is greater alignment and involvement of all levels of organizations, the industry will be taken more seriously and things like governing councils and awards will naturally fall into place.

JB: In Europe and the EU we're fortunate enough to have a number of bodies such as PerformanceIN that look at and publicize the affiliate channel from an impartial standpoint. We also have the IAB to communicate best practices which networks, advertisers, and publishers adhere to. This in itself helps provide the channel with a level of credibility. While it might require a couple of larger players to lead the charge,

once the trust in the channel is built up it will then become easier to collaborate and work in partnership with clients, instead of being merely used by them.

JL: I think it needs to be addressed by the major networks and it needs to happen. Get everyone in a room and come up with a solution... perhaps build a training course (like Google Ads has) and make it free? You could even make it compulsory: be brave and do something big.

What would be the result of this broader awareness and education in affiliate?

AM: Greater partnerships, a better user experience in online shopping and a healthier digital economy.

JB: It is up to us within the industry to educate the advertisers on the varying ways the channel is developing and how it can truly benefit their business, and in doing so the market would then see tangible growth. By using some of the new technologies available, merchants could not only help inform their other channels and internal learnings, but also reap the full rewards of an extremely cost-effective channel.

JL: Ultimately I'm sure it would lead to greater revenue being spent within the channel, less abuse and less fraud. What more can you ask for? 🙌

PANELISTS



Alec McNees
Partnerships Manager
Yieldify



James Boden
Account Director
Affiliate Window



James Little
Group Commercial Director
TopCashback

Advertiser Perspective

Robert Glazer

Founder and MD

Acceleration Partners



The potential for a US performance marketing program can be great, but understanding the nuances of other markets can help improve your chances of success. Some important factors to consider before launching your program are the awareness of your brand, local market differences, compliance, regional laws and network and technology capabilities.

Whether or not you have local brand recognition is an important factor in determining your launch strategy. An integrated multi-channel launch campaign can help to drive awareness and interest in your brand.

You then move onto audiences and attitudes. These differ by country and you should make sure someone on your team is familiar with customs and best practices or partner with an outside agency that understands its idiosyncrasies. Companies that fail to address cultural implications can slow down consumer adoption. Laws and regulations will also vary from country to country. European brands coming to the US, for instance, may find they have to contend with a wide array of state laws regarding taxation and disclosures that are entirely new for them. The same applies to a US merchant expanding overseas.

Lastly, it's important to set realistic expectations and to remember that adjusting to a new market can be difficult. That's why it's a good idea to partner with experts who know the ins and outs of performance marketing in a specific territory.

Agency Perspective

Tom Rathbone

Head of Technology

Schaaf-PartnerCentric



It may go without saying, but it should be said regardless – a market analysis into a current territory to analyse the opportunity for growth, both for current clients and potential clients unique to that territory, is the most important first step that will educate all the other decisions. An agency needs to understand if their clients (those that can sell within these expansion territories) have a real opportunity in that territory – if the product would be of interest to both the consumers of that product and to the publishers that would be promoting said product. Likewise, an agency needs to understand the potential for sales in that territory.

Other considerations must be met for the more “nitty gritty” details; items like currency conversions, creative, and languages. For this, nothing beats employees on the ground with experience in the expansion territory and the presence to attend to meetings. As such, we strongly recommend attendance to international conferences. This is vital not only for strengthening relationships with publishers for your current clients in that territory, but also for new advertiser sales.

The topics of conversation at these conferences assist in understanding the challenges and trends in a given territory. This is also a good chance to set your meetings with the local networks and tracking platforms – a comprehensive understanding of which networks and platforms are major players in the territory and the particular angle of each is pivotal to success. This is the type of knowledge and investment that clients will expect from an agency with a strong international presence.

Publisher Perspective

Alec McNees

Partnerships Manager – North America

Yieldify



International expansion is on most firms' radars when they're in the growth stage of their business, or feel that they're plateauing. However, it's not as easy as many think. The affiliate landscape is different from market to market, even across countries that many find to have similar business practices. Crossing any border requires knowledge of user behavior, best business practices, compliance and, most of all, how to be effective.

The only way to be effective when expanding abroad is to get troops on the ground. Whether it's via a partnership with an agency or hiring your own staff, there needs to be physical presence in that country. Knowledge of the market, personal networks, fluency in the language, even being in the same time zone makes a crucial difference. At the end of the day, most people do not want to do business with businesses; they want to do business with people. Furthermore, you have to have a good enough level of comfort and trust to do business with those people.

Although emails, cookies and clicks can transcend borders very easily, business always doesn't. That's why Yieldify opened up an office in New York after a year of being established in the UK. From there, conducting business in Australia led to opening up shop in Sydney to make sure that communication was fluid and effective. Canada might seem like an extension of the US to some, but it is a very different market, which is why I make sure to meet my Canadian partners in person, whether in Canada or in the US, at least twice a year.

In short, do not expand internationally without dedicating the resources to understand that market and execute a thorough plan, while you are actually a part of that market.

Attribution is the word on every US affiliate marketer's lips, regardless of whether they're prepared to deviate from the 'lack-click' rewarding mechanism which has presided over so many of their programs.

"Today's marketers are more tech-savvy than ever before," comments Robert Glazer, CEO at affiliate marketing agency Acceleration Partners.

"They are leveraging new tools and technology to gain full visibility into the consumer path to purchase across all digital channels. As a result, they have the ability to reward affiliates based on their contribution instead of paying the same amount for every transaction."

The decision to move away from delivering commission only to the last publisher in the journey to purchase is now starting to be made, but there are plenty of barriers to be scaled along the way.

Tapping into the long tail

Some marketers' reluctance to accept change in this sense is, for the most part, understandable, especially when considering that many will have a formula which is already working for their program. It's only in talking to 'that' section of highly passionate, highly-driven experts about gaining an in-depth view of how much value a publisher can drive that the demand for attribution really starts to show.

"Any publisher who tends to initiate or otherwise influence a sale without winning the last click will benefit from payment on influence or split commission attribution models," comments Alexandra Forsch, US country manager at Affiliate Window – the birthplace of commission on assists, which uses the affiliate network's own tracking technology to reward publishers for their individual contributions to sales.

The system works by merchants offering commission to publishers which are early contributors to the sales funnel.

Assists can reward publishers linked to driving a transaction without them having to be the last site that was visited before it took place. 'Splitting' the commission is great for content publishers, seen as the early influencers to a

purchase, as well as merchants who want to know where their budget is best allocated.

While this could be a cause of praise, it's imperative to consider the words of Forsch regarding where part of the inspiration came from.

"While Affiliate Window can accommodate attribution models, we also understand that the need for complex attribution solutions was born of poor compliance standards across a fairly unregulated US landscape, with little checks and balances in place throughout the networks to prevent cookie overwriting."

Bad practice has led to the network offering a 'soft-click' technology to prevent the overwriting of an existing affiliate cookie. However, as this is said to have impacted partners outside of the soft-click mould (the toolbars, software providers), there was a need for an additional piece of software to take care of those who may have been affected.

Forsch states: "We have seen that a significant amount of influence in the form of impressions and clicks remain unrewarded when these would be payable across most other channels. As this has discouraged some partners from participating in the space, we have released the Payment by Assist model to increase the likelihood that those producing the sale are fairly compensated for their efforts."

Payment on Assist works to enhance the flexibility of rewarding publishers on the network, offering 'top-up' commission to affiliates that are early contributors to the sales funnel.

"By allowing advertisers to identify and reward relevant publisher for their influence post the last click, we have seen great success particularly in engaging and activating the much sought after and valuable long-tail."

US leads the way

After seeing first hand the demand for attribution grow across Europe, one of the questions PerformanceIN was keen to ask US marketers centered around whether they had done the same.

"The US was actually a bit ahead in this area as some programs that we managed

started implementing attribution-based rules for content sites almost three years ago," comments Glazer, touching on some of the systems that came before 2015.

One review of a new split-commission feature from an affiliate network in 2010 regards it as 'not exactly revolutionary', highlighting similar tools that had been around for "quite some time". So, why now?

In short, there are signs that merchants are looking more closely at fostering and maintaining healthy relationships with the affiliates they use. A better look into attribution means assessing the value that every publisher drives, which means challenging traditional ways of assigning rewards.

A fair amount of disgruntlement is being directed towards discount and promotional affiliates, which manage to poach the last click by offering an incentive. There is a chance that attribution, once refined and adopted, can pave the way for a more harmonious affiliate landscape, where each publisher is rewarded on value, rather than how well they played the system.

Where next?

While merchants assess whether it's time to switch things up, it seems the big players are setting their stands.

EBay's dynamic commissioning model has been launched to a wealth of praise; the system offering merchants the chance to assign commission based on the quality of customer acquired. In the meantime, there are some crucial decisions to be made by other networks in regards to their stance on attributing value across a program.

Being able to track and reward on influence is certainly no mean feat. Applying weight to the belief that attribution is a thought for the future is the continued support for last click, which as stats will show is still delivering some impressive results.

Even so, those leaning on the side of 'glass half full' may see widespread acceptance of attribution as only the next realistic goal for a channel, and industry, which has accomplished so much by adapting to the new norm. 



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CONTACT US

In 2015 PerformanceIN will play host to a monthly series of exclusive roundtable events specifically designed to stimulate discussion on some of the industry's most pertinent topics. Each roundtable will be followed by an online digital supplement like this one.

For more information on how you can get involved with PerformanceIN roundtables, either as a sponsor or an attendee, please contact roundtables@performancein.com