Affiliate & Partner Marketing Association

2026

The New Rules of Discovery

How AI is Reshaping Affiliate Marketing

Part Three: Building the Future

Report by the APMA AI Taskforce

July 2026



About the APMA

The Affiliate and Partnership Marketing Association (APMA) is the collective voice for the UK affiliate and partner marketing industry.

Representing affiliates, networks, agencies and advertisers, it informs, educates and advocates for one of the most effective and diverse marketing channels.

The APMA develops industry standards, promotes best practice and champions the role of affiliate and partner marketing across the UK.

'The New Rules of Discovery: How AI is Reshaping Affiliate Marketing' is the first significant output from the APMA's AI Taskforce. This dedicated Taskforce is focused on ensuring the affiliate and partner marketing channel remains visible, fairly valued and properly represented as artificial intelligence reshapes digital discovery and decision-making.

The APMA is a not-for-profit and can only survive with the generous support of our members. If you're interested in membership, please visit the website for details.

Together, we grow.

Find out more about our work and membership at: **www.theapma.co.uk**

apma The Affiliate & Partner Marketing Association

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Author credit

The APMA would like to thank **James Bentley** for authoring this guide on behalf of the APMA AI Taskforce. His expertise, insight and commitment have been instrumental in bringing this work together. We are also grateful to the members of the Taskforce, whose feedback helped shape the perspectives and recommendations presented throughout this report.

James has over 20 years digital marketing experience at industry leaders like Adobe and Awin.

James founded his own consultancy, Numerical, to empower marketing teams through AI-driven automation and advanced AI agents.

Most recently, as Director of AI Strategy at Awin Global, he led enterprise-wide AI initiatives across product and research, bridging technical capability with business impact. His previous leadership roles include UK Strategy Director at Awin and Head of Client Services at Adobe Advertising Cloud.

A recognised authority in the field, James chairs the APMA AI Taskforce, sits on the UKAI Agentic AI working group, and is a frequent speaker on generative and applied AI across Europe.

For more information on Numerical, please visit the website.



James Bentley
Founder, Numerical

Numerical

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Introduction

Rewarding Influence in an AI Economy

Measurement alone does not solve the industry's biggest challenge.

The more important question is commercial.

If publishers are helping AI systems educate consumers, recommend products and shape purchase decisions, how should that contribution be recognised? If AI-generated experiences reduce measurable clicks while continuing to rely on publisher expertise, what becomes the appropriate commercial model?

There is unlikely to be a single answer.

Affiliate marketing has always evolved through experimentation, and the AI era will be no different.

New commission structures, visibility-based rewards, licensing agreements, fixed-fee partnerships and agentic commerce protocols are already beginning to emerge.

Some will succeed, others will disappear, and many will exist alongside traditional performance models for years to come.

Part Three of 'The New Rules of Discovery: How AI is Reshaping Affiliate Marketing' explores where those models are developing today, what regulation may enable, and how the industry can begin adapting before standards fully mature.

There are also two fantastic appendices:

1. **Findings from the APMA's publisher survey looking at AI search traffic, tracking, measurement and remuneration.**

2. **We asked our members to share details of the tools they've built within the AI search space. This is your one-stop shop for the latest AI tech in the affiliate industry.**

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Advertising arrives in AI search

AI platforms are actively monetising paid placements embedded in conversational and search responses.

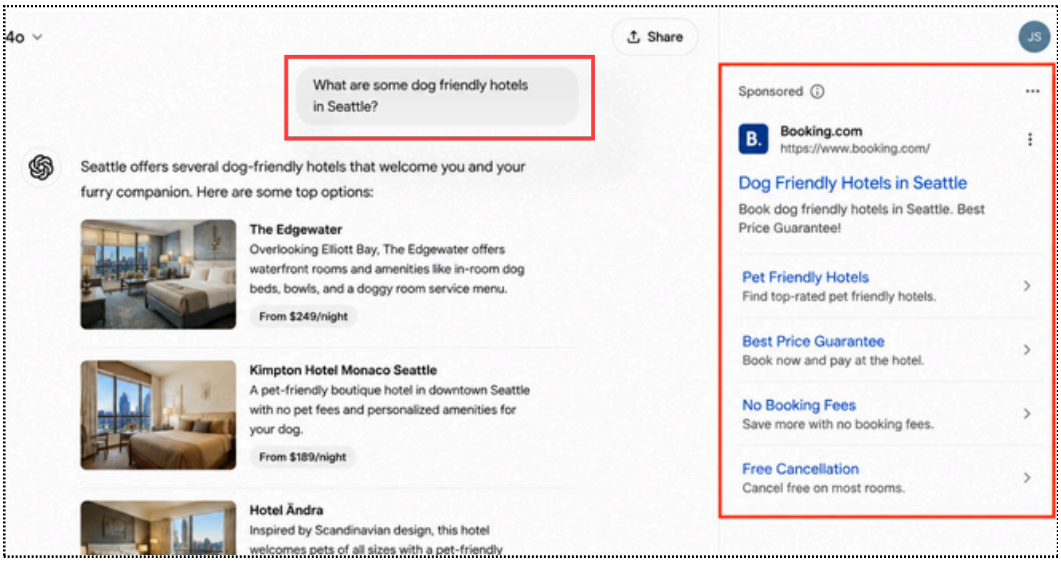
Google serves sponsored results above, below and within AI Overviews across 200 markets. Segmented reporting when ads appear inside AI Overviews is not supported.[18]

Following OpenAI's launch of ChatGPT ads in 2026 and the rollout of its US self-serve ads manager in May, the major AI platforms, we've entered a new phase. While AI platform ad inventory has scaled, attribution hasn't progressed at the same pace.

Without effective attribution, these new AI ad formats risk misappropriating credit for demand that affiliate publishers helped seed earlier in the journey.

Consider a typical consumer journey:

A user compares a product on an affiliate site. They return via AI chat that presents a sponsored recommendation. They click through and complete the purchase.



Under most current attribution models, AI platforms award last-touch credit for a decision that the publisher's content facilitated. A lack of tagging to label AI ad exposures and pass campaign identifiers into attribution models, compounds the lack of credit.

Proactive, industry-wide coordination is required. Advertisers, networks, and platforms must establish rules for classifying AI-referred traffic and distinguishing among paid, organic, and blended signals before these products mature.

Ultimately, journey-path analysis and incrementality testing should accompany any paid AI investment to determine whether the platform is generating new demand and value.

[18] https://support.google.com/google-ads/answer/16297775?hl=en

Agentic shopping: attribution, control & the purchase journey

AI platforms are beginning to move beyond product discovery into the transaction layer.

OpenAI's Instant Checkout, powered by the Agentic Commerce Protocol (ACP), showed one version of this: a user could discover a product and complete a purchase without leaving ChatGPT.

Google is moving in a similar direction through its Universal Commerce Protocol and Universal Cart, designed to support agentic checkout across AI Mode, Gemini and other Google surfaces.

For the affiliate channel, this creates new attribution challenges.

What is 'agentic shopping'?

Agentic shopping is when **AI acts on a customer's behalf** to find, compare and buy products or services, rather than simply recommending them.

It can handle multiple stages of the purchase, from **researching** options and **checking prices** to **completing the transaction**.

Outcome-based tracking works best when a user moves from one measurable environment to another: for example, from a publisher to an advertiser site, where referrers, tags and network tracking can operate.

Agentic shopping can shorten that journey. **If discovery, evaluation and purchase happen inside an AI platform, there may be no conventional click path for the affiliate channel to observe.**

Review sites, buying guides, and comparison content may still help shape an AI-generated shortlist.

But if the purchase takes place in a flow that does not preserve affiliate identifiers, that contribution may never appear in the transaction record.

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The gap is not technically inevitable. The Agentic Commerce Protocol includes optional affiliate-attribution fields for crediting third-party publishers, including:

- Attribution/Affiliate platform provider
- Publisher ID
- Campaign ID
- Creative ID
- Sub-ID
- Source URL
- Metadata
- First- or last-touch context

Attribution can be passed when a checkout session is created and again when it is completed, with the attribution stored alongside the resulting order.

The examples in the ACP code repository name impact.com as an affiliate tracking provider, suggesting that **functionality within the protocol has been designed with affiliate network-style attribution in mind.**

The harder question is whether those fields become standard practice.

Optional attribution only creates value if platforms, merchants, networks and advertisers choose to support it consistently.

The lesson from in-app tracking is that attribution gaps become difficult to fix once new buying behaviours take hold.

The priority now is to test whether publisher and affiliate identifiers can survive emerging agentic commerce flows, from checkout-session creation through to order validation and commission settlement.

The affiliate channel should use the existence of these attribution fields to argue that **publisher recognition is technically possible, commercially necessary and should be treated as core infrastructure** before AI-native buying journeys become standard.

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Content value & commissioning in an AI economy

If a publisher's content influences an AI platform user journey without a trackable affiliate click, what is that worth?

The answer depends on how that value is measured.

In some instances, value remains tied to a trackable outcome. In others, it is promotional: helping a brand secure "share of voice" within AI-generated answers or category recommendations.

Alternatively, value may be captured through direct access, via licensing, pay-per-crawl, or marketplace-style arrangements.

While no settled model exists, early frameworks are emerging.

Partnerize's Influence Compensation Lighthouse Program is currently testing influence-aware commissions with partners including Adobe, HubSpot, Profound, Away Travel, and Vox Media, with independent evaluation by Ipsos.

The Alliance for Audited Media (AAM) certification of Partnerize's Fractional Commission Standard provides important early validation for this approach. While this work is foundational, the wider market has yet to converge on a shared model.

For now, much of this valuation will remain negotiated rather than fully automated. Brands and publishers are already leveraging **crawl data**, **citation research**, and **visibility analysis** to evolve where they invest their budgets. The immediate challenge lies in converting these signals into standardised KPIs and scalable payment mechanics.

Brands will also need confidence that they are not straying too far from the established affiliate marketing model when paying for outcomes.

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How are publishers currently monetising for AI Search?

The APMA carried out an AI search survey of 67 publishers in the spring of 2026. We asked a series of questions, primarily focused on traffic, tracking and remuneration.

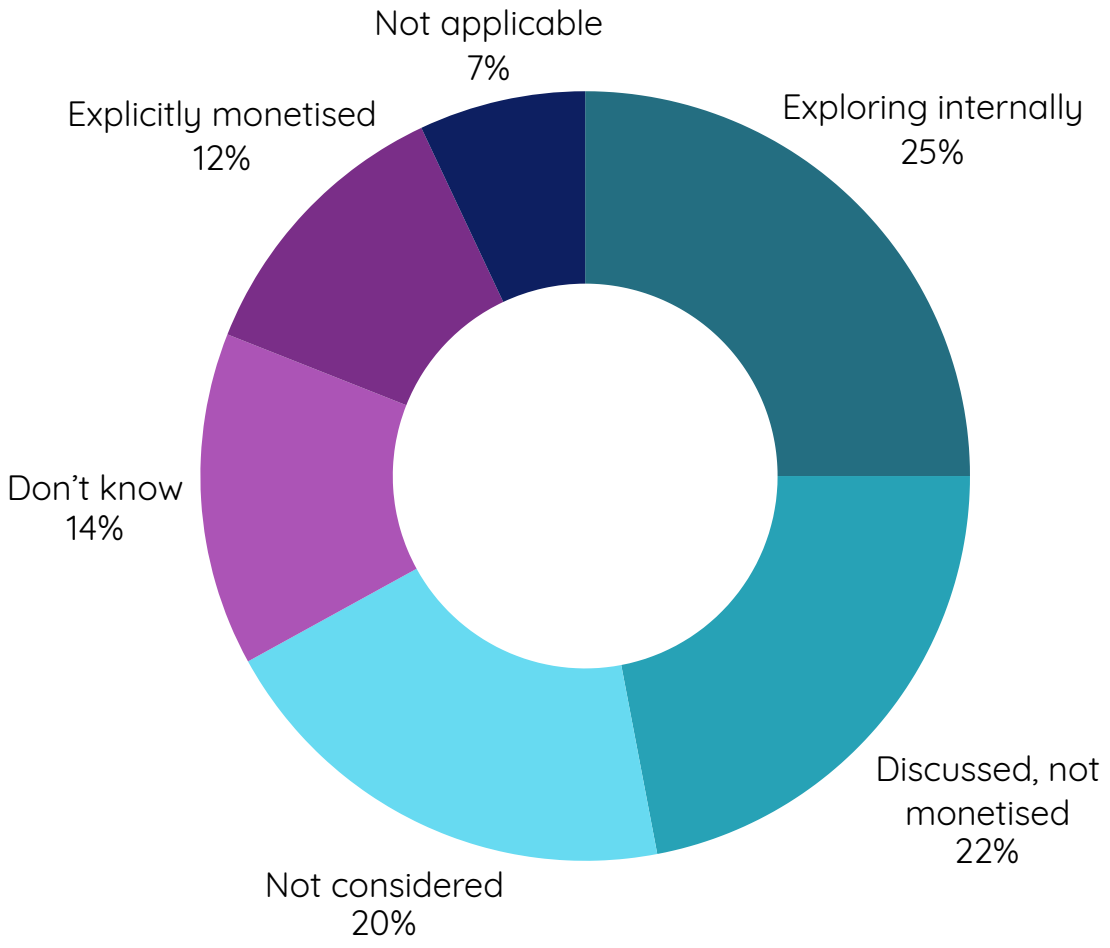
On the latter, the industry has begun to recognise AI visibility as something that has commercial value, but we currently lack a consistent way of paying for it.

Only 12% of respondents said AI-driven visibility was explicitly monetised. A much larger group is somewhere between recognition and revenue: **25% are exploring it internally, while 22% have discussed it commercially** but have not yet monetised it.

Combined, this means almost half of the respondents can see a potential commercial offering but are not yet earning money from it.

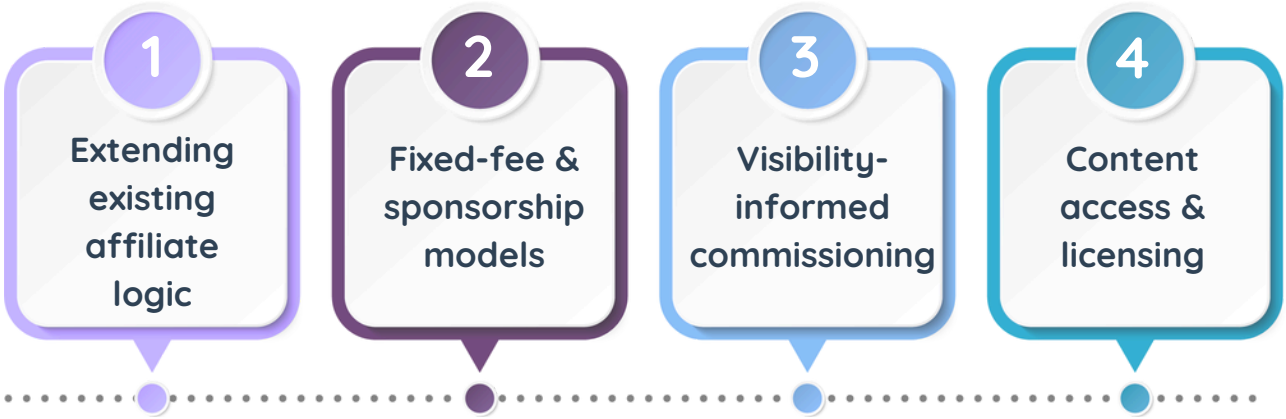
Publishers are also exploring different options: content for brands, selling AI share-of-voice services and fixed fees for content generating citations. Some are considering a move away from affiliate commissions altogether towards fixed-fee arrangements.

Q. How, if at all, is AI-driven visibility (e.g. citations) currently included in the way you operate commercially?



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So, what could future commissioning models look like in a world of AI search, when brands will still demand performance is at the heart of their affiliate programmes? There are four broad approaches we've identified:



1 Extending existing affiliate logic

Last-click commission remains the default in affiliate. It works well when journeys are linear and clicks are recorded. It is less able to recognise publisher influence that happens upstream of, or instead of, a tracked click.

The channel does, however, have precedents. **Soft-click, soft-cookie and multi-touch frameworks already recognise that a publisher touchpoint can add value even when it is not the final click or sole cause of conversion.** Their logic is relevant to AI-mediated influence, but they still depend on something the affiliate system can observe.

Affiliate already has mechanisms for recognising contribution beyond last click. The challenge is adapting that logic to AI environments where the evidence may be retrieval, citation, visibility or an AI-assisted journey rather than a tracked click.

Possible payment mechanics: CPA, CPS, assisted-conversion commission, fractional commission split, soft-click reward, multi-touch commission share.

2 Fixed-fee and sponsorship models

Fixed-fee partnerships, retainers, sponsorships and tenancy-style deals are the most immediately actionable brand-funded models. They allow brands to support publishers whose content appears influential in AI environments, without requiring every AI-influenced journey to be tracked to conversion.

Brands can use crawl activity, citation visibility, query coverage and AI prominence analysis to identify high-value pages or category areas. A brand might sponsor a publisher's category hub because it is frequently retrieved by AI search crawlers for commercially relevant topics. Or it might fund a content partnership where

performance is reviewed against both conventional affiliate outcomes and AI visibility evidence. These models are closer to media or partnership funding than traditional commission. Their value is that they give brands and publishers a practical route to act now, while attribution standards are still developing.

Possible payment mechanics: monthly retainer, tenancy fee, sponsored-content fee, category sponsorship, fixed fee plus CPA, AI visibility bonus.

3 Visibility-informed commissioning

Visibility-informed commissioning keeps the commercial relationship closer to affiliate performance logic. Instead of paying a flat fee, brands and networks use AI visibility evidence to adjust commission rates, tiers, bonuses or influence payments.

One route is to treat citation or AI prominence as an input to commission tiers. Another is to integrate citation visibility into network platforms.

The distinction from fixed-fee partnerships is the payment mechanism. The reward remains commission-like: an uplift, bonus, tier or performance-linked adjustment, rather than a flat media-style fee. This is the area closest to the affiliate channel's existing model because it tries to connect visibility to commercial reward.

It also requires the most caution. AI visibility is useful evidence, but not yet audit-grade proof on its own. Commission rules will need to be clearly agreed, commercially tested and, where possible, calibrated through incrementality analysis.

Possible payment mechanics: citation-based commission uplift, tiered CPA based on AI prominence, bonus for publisher citation within a defined query set, commission uplift where an AI touchpoint and publisher visibility evidence are both present.

4 Content access and licensing

Content access and licensing are part of the same broader shift, but they are different from brand-funded promotion. **In these models, AI platforms, marketplaces or intermediaries pay publishers for access to content, retrieval, training, grounding or other forms of use.** The payment is for content access, not for promoting a brand or driving a specific advertiser outcome.

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That distinction is important for affiliate publishers. Licensing may not sit inside the direct relationship between publisher, brand and network, but it can still form part of a publisher's broader AI commercial strategy. It creates another route for publishers to be paid when their content is consumed by AI systems, especially where that consumption does not produce proportional referral traffic or affiliate revenue.

This includes direct licensing deals with AI companies, machine-readable licensing through standards such as RSL, pay-per-crawl models and publisher-to-AI marketplaces. Large publishers have negotiated direct licensing deals with AI companies, but most affiliate publishers lack that bilateral leverage.

Machine-readable licensing offers a more scalable route, allowing publishers to express terms for training, live search, inference or other uses through a standard file on their domain.

Possible payment mechanics: annual licensing fee, revenue share from AI content marketplace, pay per crawl, pay per 1,000 retrievals, pay per inference, paid access for training or live grounding.

How the models fit together

For the foreseeable period, these models are likely to coexist. A publisher might receive a tracked affiliate commission for measurable conversions, a fixed fee from a brand for AI-visible category content, a bonus linked to citation visibility, and separate licensing revenue from AI content access.

The same underlying evidence - crawl volume, citation visibility, page-level prominence or query coverage - may inform more than one model. What changes is the commercial relationship and the results being paid for.

For affiliate publishers, the near-term priority is to document AI visibility, establish terms for content use and use that evidence in commercial conversations.

What is clear from the publisher survey we carried out in the spring of 2026, is that publishers are not universally doing this. **This should be prioritised.** For brands and networks, testing models that reward publisher influence without overstating what current data can prove should also be a priority.

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What this means in the next 18–24 months

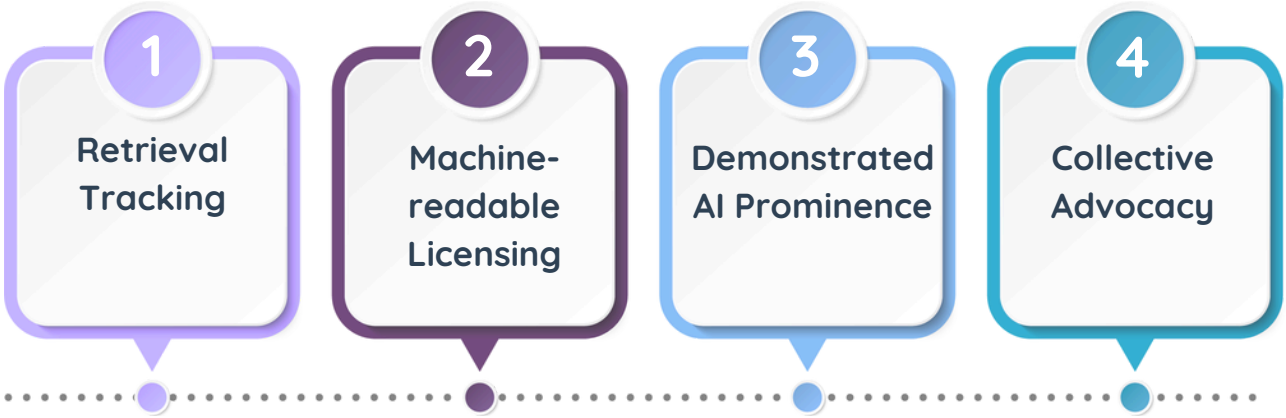
The AI search / publisher influence commissioning question will not be resolved in a single year, and it will not be defined by a single model.

The likely shape over the next eighteen to twenty-four months is a hybrid:

- **existing click-based** commissions for tracked outcomes;
- prominence-informed **commission tiers**, drawing on AI visibility data;
- strategic **fixed-fee partnerships** informed by visibility insights;
- **content licensing** and **crawl fees** in parallel.

The mix will vary by publisher type, brand maturity and network capability.

For affiliates, the most productive near-term path combines four elements:



1. **Retrieval tracking:** Tracking when an AI tool uses or cites an affiliate's content.
2. **Machine-readable licensing**: Digital rules telling AI companies how content can be used and what they must pay.
3. **Demonstrated AI prominence**: Evidence showing how often an affiliate appears in AI search results.
4. **Collective advocacy**: Affiliates working together to push for fair payment from AI companies.

The APMA has an important role in helping to solve this. The question is who tracks and verifies AI touchpoints: the affiliate network, the specialist visibility vendor, or the AI platform itself? Also, how do existing soft-click and soft-cookie frameworks evolve to recognise AI-mediated influence?

We will also need new uplift reporting: ways of demonstrating that fixed-fee placements, content or AI-prominence investments are producing real commercial return rather than merely reflecting it.

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What regulation may, and may not, deliver

Recent UK regulatory work has put publisher control, transparency and source attribution in AI search more firmly on the agenda.

In January 2026, the UK Competition and Markets Authority consulted on a Publisher Conduct Requirement for Google's general search services. The draft requirement focused on three areas:

- **Publisher choice** over how content is crawled for general search is used in Google's generative AI services and features;
- **Transparency** over how that content is used and engaged with;
- **Attribution** of publisher content in AI search features.

That consultation has led to the following outcomes:

On 3 June 2026, the CMA imposed a new conduct requirement on Google Search, following its decision to designate Google with strategic market status in general search services. The requirement gives publishers more control over whether their content can be used to power Google's AI search features, including AI Overviews and AI Mode. It also requires clearer attribution, stronger publisher controls and reporting on Google's compliance.[19]

You can read more on the APMA website, **here** and **here**.

The CMA's analysis links Google's generative AI features to issues close to publisher monetisation, including declining referrals, bargaining position and compensation. It is focused on attribution, publisher control and transparency. But it is commercially relevant to the affiliate channel because it recognises publisher content has value inside AI search, even if the user journey does not resemble a conventional click path.

Alongside the CMA process, Google has announced a number of publisher-facing features. These include Preferred Sources appearing in AI Overviews and AI Mode, more prominent carousels for timely articles and perspectives, expanded "Highly Cited" labels, and new Search Generative AI performance reports in Search Console.

[19] https://www.gov.uk/government/news/cma-secures-fairer-deal-for-publishers-and-improves-google-search-services-in-uk

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In its June 2026 white paper 'A Pragmatic Approach to AI Governance in America', Google also stated that it is 'exploring new types of partnership and value-exchange models… with websites whose content meaningfully contributes to the freshness and factuality of generative AI responses'.[20]

As the CMA pushes for enhanced controls, attribution and transparency, Google is rolling out mechanisms for source prominence and AI search reporting, and both point in the same direction: **quality content matters more, not less, in AI search**.[21]

For affiliate publishers, networks and brands, the significance lies in the evidence layer that this could create. Before publisher influence is valued, the channel needs clearer evidence of where content has been used, presented, whether users engaged with it and if that exposure contributed to later commercial outcomes.

The CMA's proposals, the first of their kind in the world, could strengthen the case for citation tracking, content-use reporting, assisted-contribution models and licensing discussions.

It also gives formal regulatory weight to a more commercial point, that publisher content can create measurable value in AI search, even when that value is not captured by last-click attribution.

The APMA will monitor how the CMA requirement is implemented, with particular attention to:

- The scope and usability of publisher controls;
- Whether controls operate at domain, directory and page level;
- The standard and prominence of attribution in AI search features;
- The engagement and performance data made available to publishers;
- Whether AI search reporting is granular enough to support commercial analysis;
- The transparency of Google's compliance reporting;
- The impact of Google's new publisher-facing features on referral traffic, citation visibility and commercial negotiations.

For the affiliate channel, the central question is whether these changes produce data that can be connected to commercial outcomes. If they do, they could help publishers, networks and brands move beyond a narrow last-click view of value and towards a better understanding of publisher contribution inside AI-mediated discovery journeys.

[21] https://blog.google/products-and-platforms/products/search/original-high-quality-content-search/

[20] https://blog.google/products-and-platforms/products/search/original-high-quality-content-search/

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What you can do now

The affiliate channel does not need to wait for a perfect AI attribution standard before acting.

The subject can feel daunting and out of our control, but we've included some practical steps and actions you can take NOW:

1. Use the three-layer framework as shared language

Brands, publishers and networks should organise their work around **retrieval**, **citation** and **outcome**. Retrieval shows where AI systems access publisher content. Citation shows where that content appears in AI-generated answers. Outcome shows where AI-referred or AI-assisted journeys can be connected to conversions. No layer is complete on its own, but together they give the channel a practical way to describe influence beyond the click.

2. Turn visibility into commercial evidence

Crawl data, **citation visibility**, **AI prominence analysis** and **journey-path attribution** can already support better conversations about fixed fees, retainers, commission uplifts, assisted-value payments and strategic partnerships. Networks have a central role in connecting those views and being clear about what current measurement can and cannot prove.

3. Start testing hybrid reward models

Click-based commission remains essential where outcomes are measurable. But the channel should also test models that recognise publisher influence when the click is missing: **soft-click logic, prominence-informed tiers, fixed-fee partnerships, assisted-conversion rewards and carefully governed fractional commission approaches**. The aim is not to replace performance marketing, but to adapt it to when influence happens upstream.

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4. Protect and price content use

Publishers should document where **AI systems retrieve, cite or otherwise consume their content, and set machine-readable terms where possible**. Blocking, allowing, charging or selectively permitting AI crawlers all involve trade-offs between control, visibility and monetisation. Brands and networks should recognise that content licensing, pay-per-crawl, AI-visible content partnerships and affiliate commission may need to sit alongside one another.

5. Build attribution into agentic commerce early

Agentic shopping creates a tracking gap whenever an AI assistant sends someone to a retailer or completes a purchase for them. **Affiliate tracking must work across every step, including AI checkouts, retailer websites and apps,** so networks, advertisers and platforms need to test these journeys now before they become widely used.

6. Treat AI advertising as both media and measurement

Paid placements inside AI answers should be labelled and evaluated separately from organic AI referrals, AI citations, direct traffic and affiliate clicks. **Brands should assess if AI advertising complements affiliate discovery or captures demand that publisher content created**. Networks should help show visibility of publisher influence inside these mixed journeys.

7. Coordinate through the APMA

The biggest open questions - affiliate-specific traffic impact, citation standards, licensing models, agentic attribution, AI advertising measurement and influence-based commissioning - **require collective evidence and a collective voice**. Individual organisations see only part of the picture. The APMA will focus on shared standards, shared language and shared advocacy.

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What We Still Need to Learn

The limits of current evidence are not a reason for inaction; they help shape our next steps

The APMA believes the most urgent questions are below.

How are different publisher models affected?

No large-scale study yet shows how AI search affects comparison sites, voucher publishers, content creators, cashback platforms and CSS partners differently. Their content, traffic sources and commercial models are too different to treat as one group.

Does AI visibility translate into affiliate value?

Evidence suggests AI citation can improve brand engagement through other channels, but it is not yet clear if that value flows back to publishers whose content shaped the answer.

Which commercial models work beyond the largest publishers?

Direct AI licensing deals are available to only a small part of the market. The question is whether collective licensing, machine-readable terms, pay-per-crawl, fixed fees and influence-based commission can work for the broader affiliate publisher base.

Do AI citations & AI impressions become commissionable measurements?

The channel needs clearer definitions, shared methodologies and trusted payment standards before these signals can be used consistently in commercial models.

How does AI advertising change affiliate economics?

Paid placements inside AI answers may complement affiliate-led discovery, or they may capture demand created by publisher content. The difference will depend on tagging, attribution and how advertisers evaluate mixed AI and affiliate journeys.

Does regulation protect publishers?

UK & EU regulatory processes may improve transparency, source attribution and publisher control, but their value to affiliates depends on their desire to push for greater publisher support and protections.

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The APMA's Role

The APMA's role is to turn a fragmented and uncoordinated industry into a force for positive change. No single publisher, brand or network can answer these questions alone.

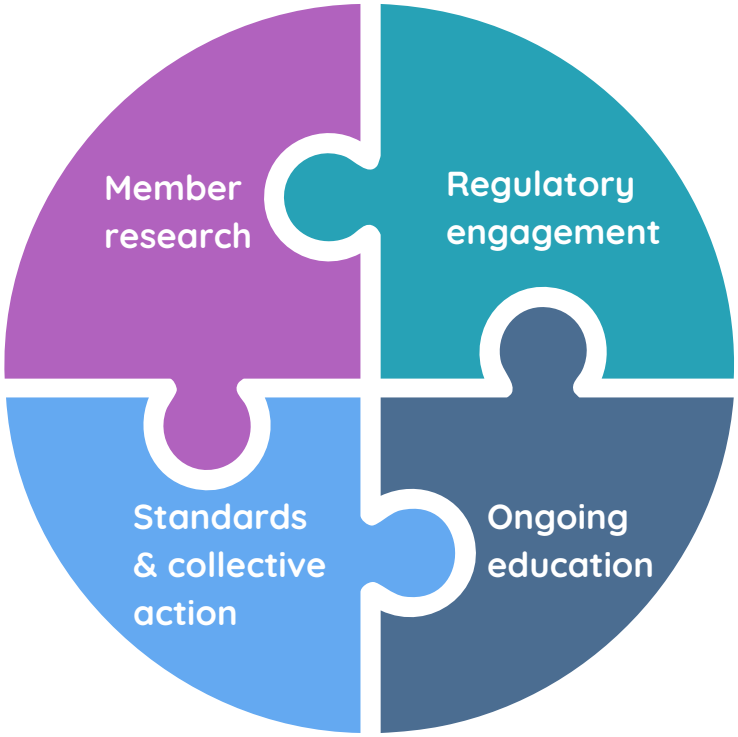
The questions defined in the last section of this guide, form the next phase of the APMA's work: building affiliate-specific evidence, shaping standards and representing the channel in regulatory and commercial discussions

Member research

We have released the first affiliate-specific evidence base on AI search impact. Some of the data has been presented in this report and you'll find the charts and graphs in the appendix.

We specifically focused on measurement, traffic and commercials.

As you will see from the data, many businesses are still in the foothills of their understanding on this topic, which is why, we believe, this report is so important. We will continue to survey companies and take the industry's tempoerature.



Regulatory engagement

The APMA is engaging with regulatory processes on behalf of the affiliate channel.

We submitted a consultation response to the CMA's proposals on publisher controls, advocating for meaningful opt-out mechanisms, transparent engagement data, and recognition of the affiliate channel's distinctive role in the content ecosystem. We will continue to represent member perspectives as UK and EU frameworks develop.

Ongoing education

This document represents where the industry stands in mid-2026. We recognise that AI search is a fast-moving subject and the picture described here will look different in twelve months.

We will revise our assessment as evidence develops, regulatory outcomes emerge, and commercial models mature. Our commitment is to give members an honest, current view of where things stand and a clear sense of what to do about it.

Standards and collective action

The APMA supports open standards that serve the collective interest of the channel.

Machine-readable licensing, shared attribution frameworks, and common measurement methodologies reduce fragmentation and give smaller publishers collective leverage they cannot build alone. The same applies to commissioning.

The industry will benefit from shared definitions of AI citation and AI impression as commissionable events, rather than fragmenting into proprietary methodologies.

We will also seek to strengthen ties with trade associations and third-parties, like OpenAttribution.org, who advocate for fair publisher rewards for AI Search content.

Be part of the movement

As a small not-for-profit, we rely on businesses within the affiliate and partner marketing space to come forward, volunteer and collaborate. Our AI taskforce is always open to new voices and members.

If you are interested in APMA membership, please contact us for more details.

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Closing

Increasingly, publisher content is being used at significant scale by AI systems without commensurate reciprocal value.

The imperatives are to define how publishers are rewarded **and** evolve the channel's technical and commercial infrastructure so that influence can be recognised in AI search journeys.

That work has begun: in new measurement tools, network pilots, licensing frameworks, regulatory engagement and early influence-based commissioning models.

But the industry needs to prioritise these efforts over feature updates. Establishing the solid base upon which all affiliate programmes must be built should be the number one priority and **the channel risks being left behind if it does not start to pool evidence and work towards common standards and metrics**. Inevitably, much of this work will fall to networks and third-party platforms.

The affiliate industry has reinvented itself many times over the past twenty-five years and can absolutely do so again.

This report is designed to be the first major piece of work that lays out the challenges, as well as (we hope), the opportunities. But it is only one standalone report.

We hope it will be seen as a rallying cry to industry to look beyond the day-to-day running of their businesses. What matters now is that the affiliate industry moves together, creating the shared language, shared standards and shared evidence needed to ensure publisher influence continues to be recognised in the next generation of digital commerce.

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A Note on Sources

This paper draws on peer-reviewed academic research, independent infrastructure provider data, regulatory filings, primary company disclosures and industry reporting.

Where vendor-sourced or company-reported data is used, commercial interest is noted and the claim is treated as directional. Several emerging areas - citation tracking methodologies, AI visibility platforms, influence-based commissioning frameworks - currently rest on vendor-published evidence.

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Appendix 1

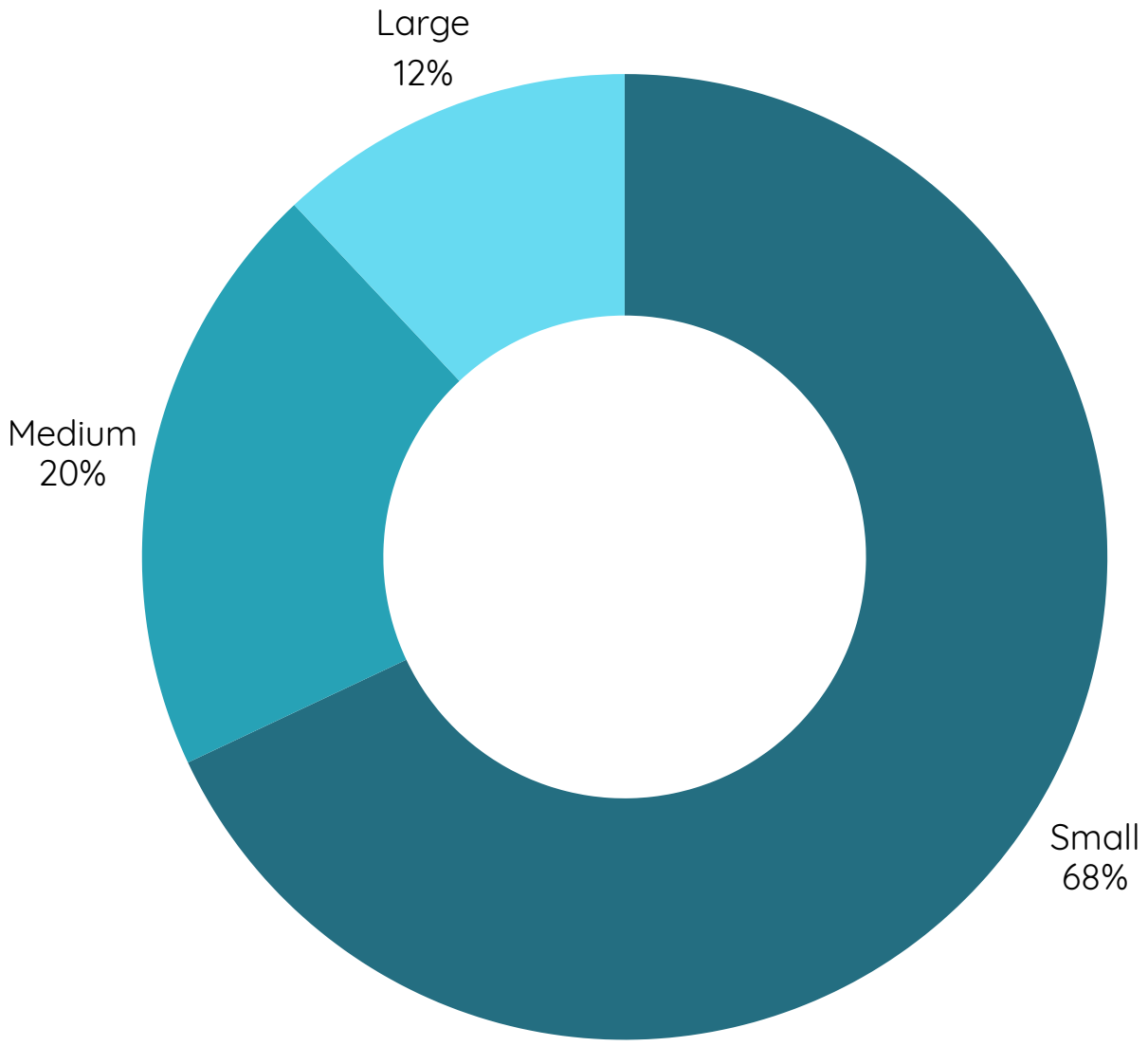
Charts & Graphs from the APMA Publisher Survey

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We ran a self-selecting publisher survey across May and June 2026. It could be filled in anonymously and all of the questions were optional. We received 67 responses.

The survey sought to understand how AI Search is impacting UK publishers across tracking, traffic, measurement and remuneration.

Q. What best describes the size of your business?



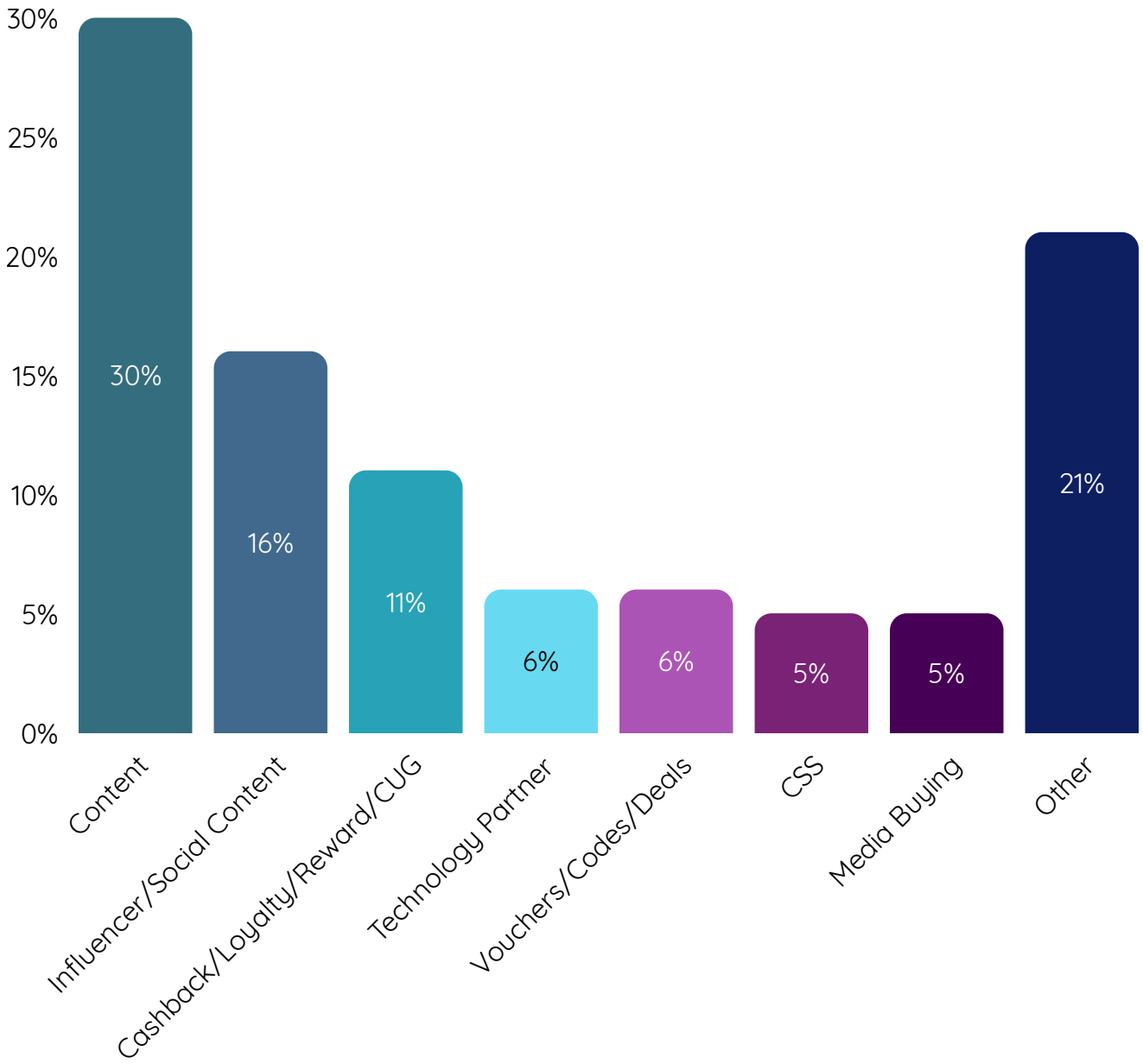
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The survey sought to understand how AI Search is impacting UK publishers across tracking, traffic, measurement and remuneration.

Q. What best describes what your business does?



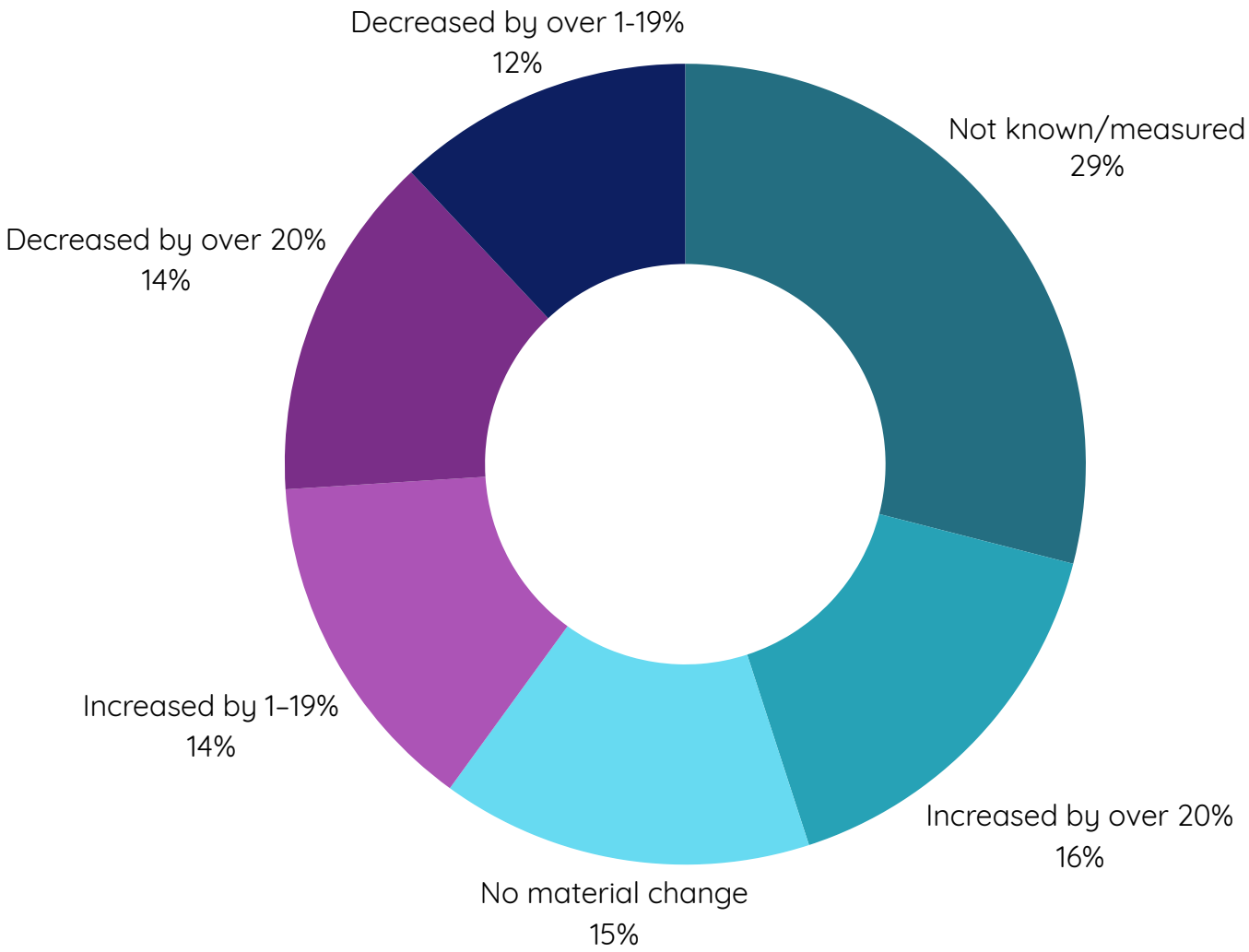
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Charts & Graphs from the APMA Publisher Survey

We ran a self-selecting publisher survey across May and June 2026. It could be filled in anonymously and all of the questions were optional. We received 67 responses.

The survey sought to understand how AI Search is impacting UK publishers across tracking, traffic, measurement and remuneration.

Q. Over the past 12 months how has your total organic search traffic from Google Search changed based on your analytics platform?



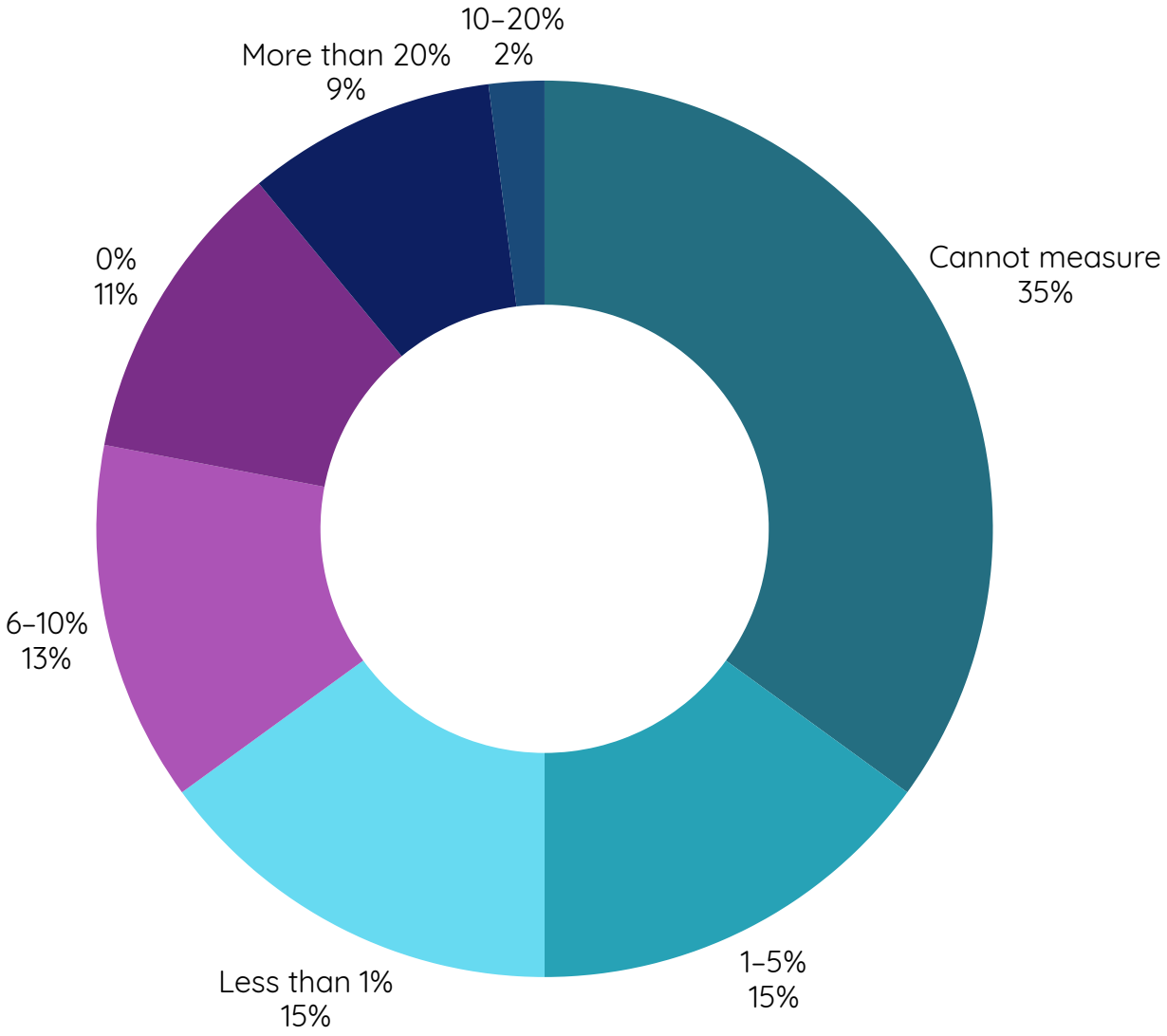
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Q. Approximately what percentage of your total website sessions currently originates from AI-driven search or answer platforms, based on your referral or attribution data? (Consider all systems such as ChatGPT, Claude, Gemini, etc.)?



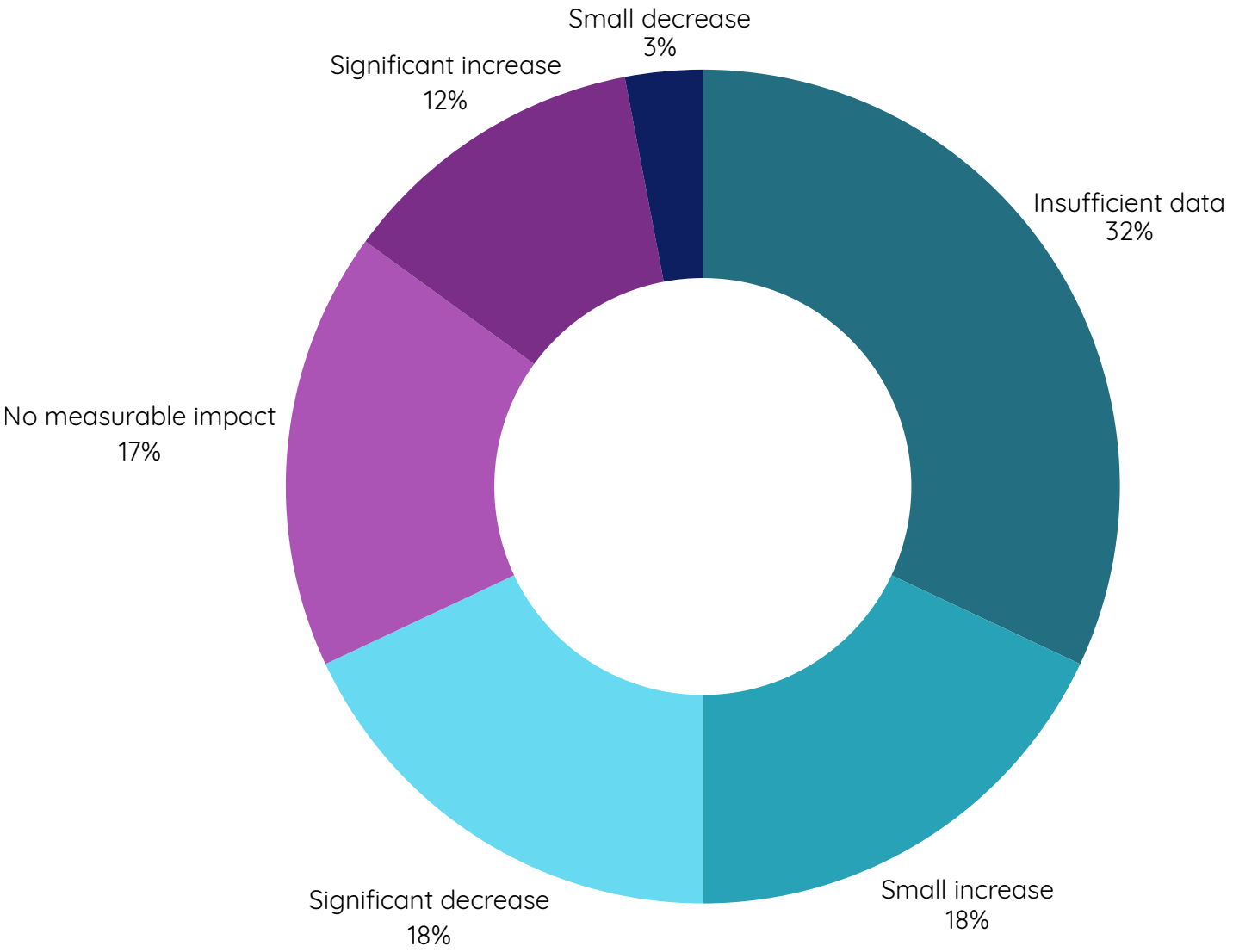
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Q. Based on your observed data and/or internal analysis, what has been the net impact of AI-driven search platforms on your total website traffic over the past 12 months?



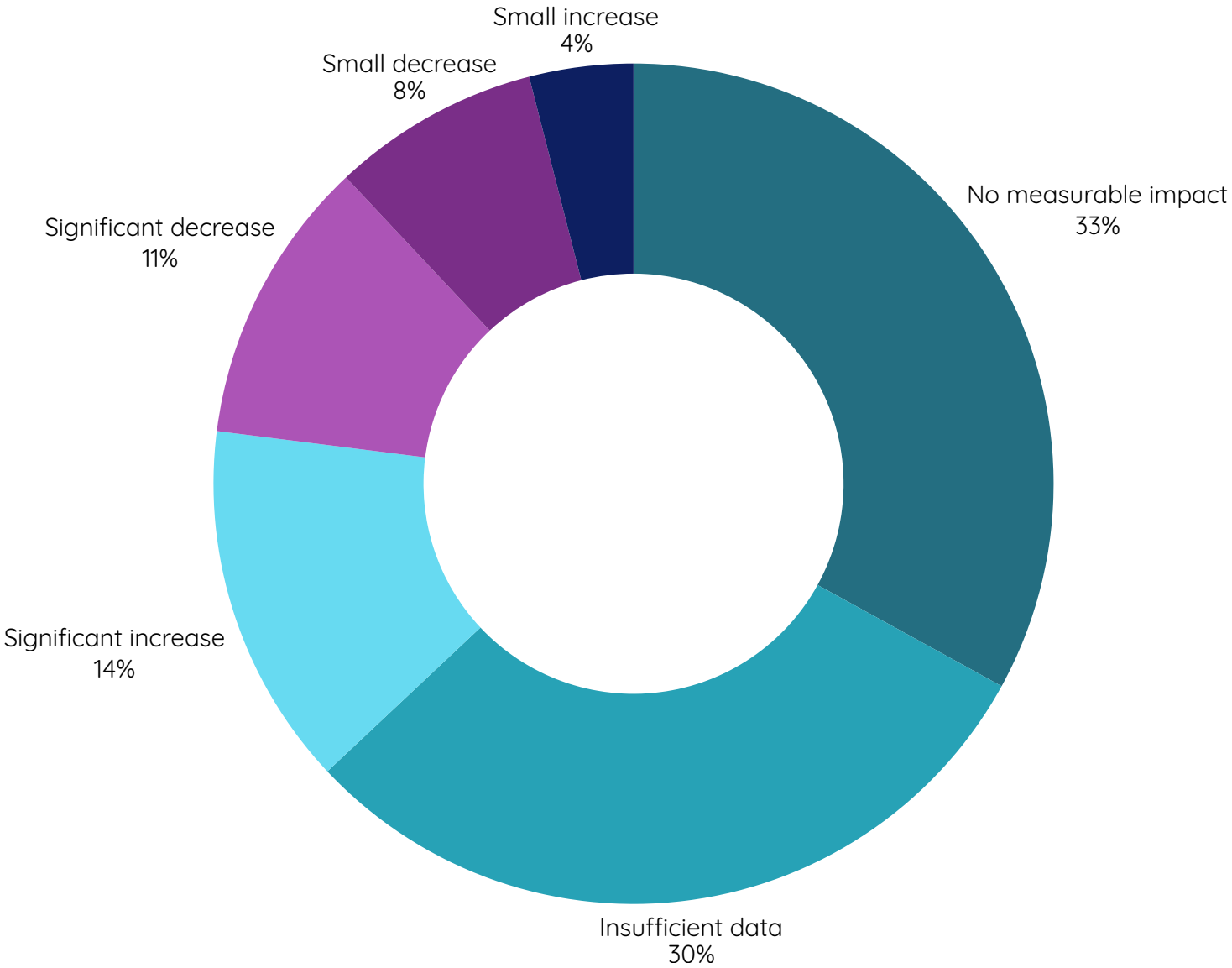
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Q. Based on your observed data and/or internal analysis, what has been the net impact of AI-driven search platforms on your total earnings over the past 12 months?



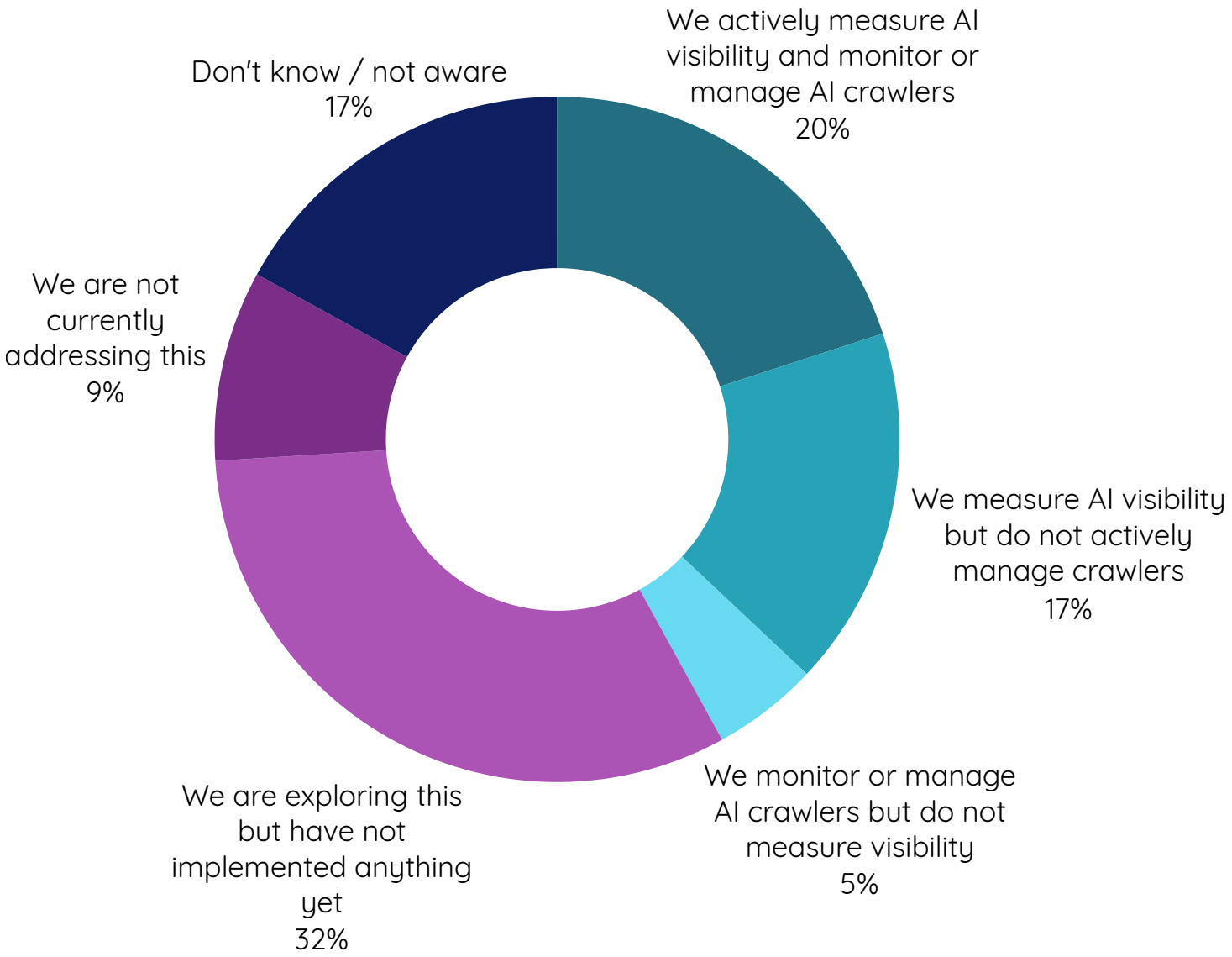
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Q. Which of the following best describes your current approach to measuring and managing AI-driven visibility (e.g. citations)?



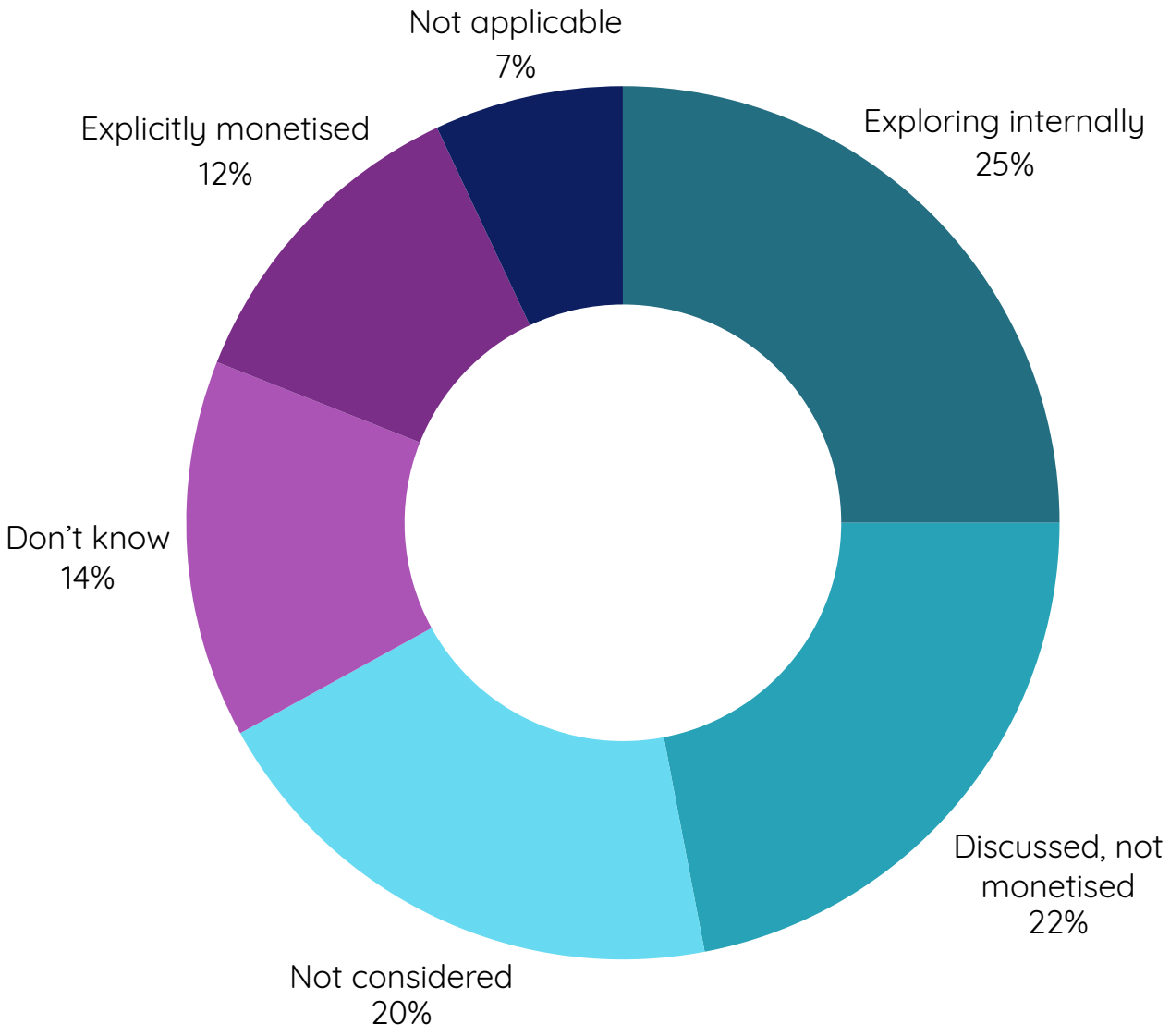
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Q. How, if at all, is AI-driven visibility (e.g. citations) currently included in the way you operate commercially?



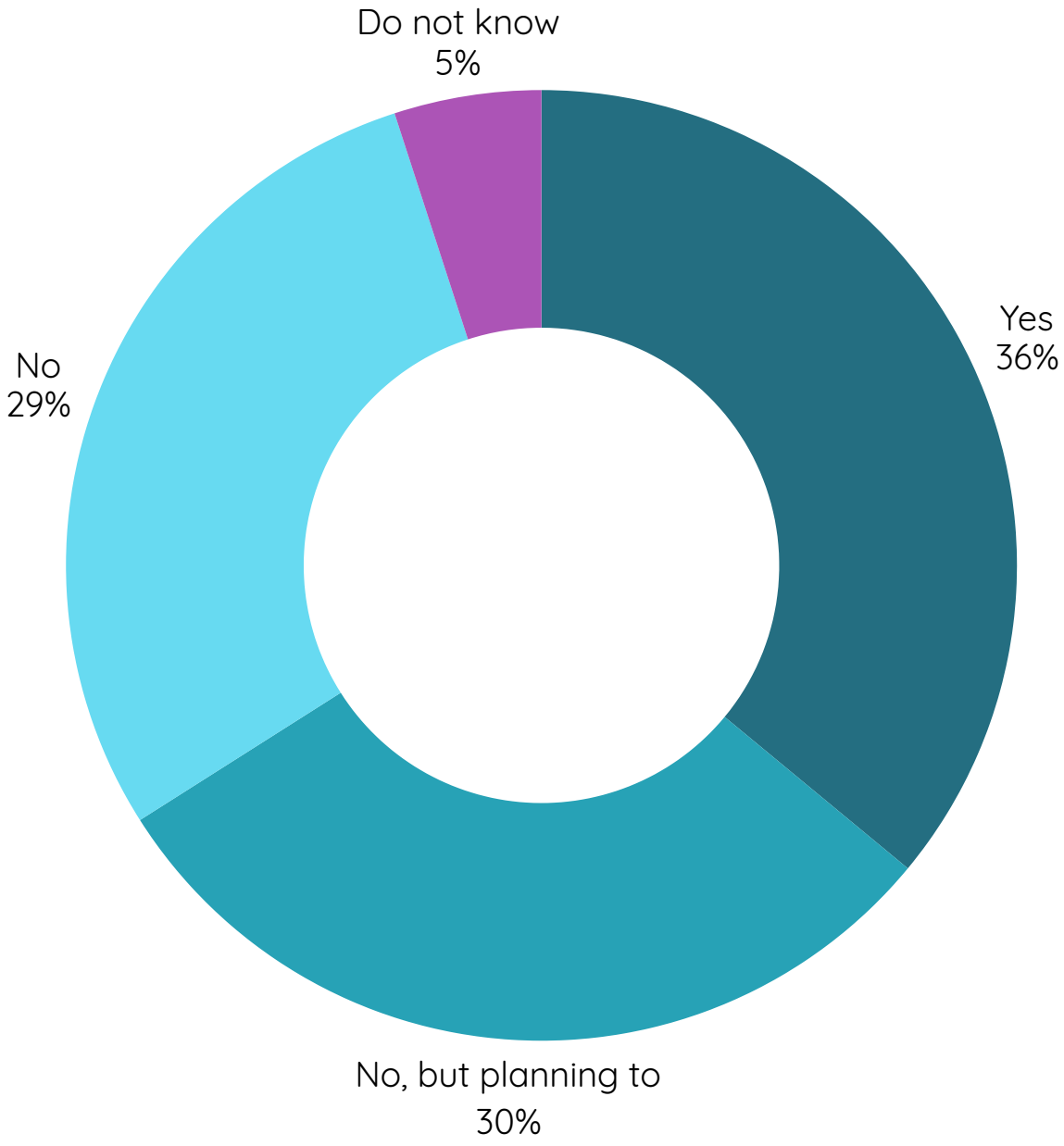
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The survey sought to understand how AI Search is impacting UK publishers across tracking, traffic, measurement and remuneration.

Q. Are you using AI to engage with your audience directly?



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Charts & Graphs from The APMA Publisher Survey

Standout statistics (67 responses):

- 31% reported an increase in organic Google traffic; 26% reported a decrease.
- 14% said Google traffic had fallen by more than 20% during the previous year.
- 34% could not measure how much traffic they received from AI platforms.
- 19% reported a significant decrease in overall website traffic from AI search.
- The reported earnings split evenly: 18% reported an increase and 18% a decrease.
- 29% did not have enough data to assess the impact of AI search on earnings.
- 34% were exploring AI visibility but had not implemented any measurement or crawler-management capabilities.
- Only 19% actively measured AI visibility/ monitored or managed AI crawlers.
- Only 12% said AI visibility was explicitly monetised; 22% discussed it commercially.
- 37% already use AI to engage with their audience; 29% planned to do so.

Standout quotes:

“Referral attribution from LLM platforms is effectively invisible in standard analytics.”

“Affiliate fixed-fee spend on paid content does not have a ROAS objective, but instead a citation-count objective.”

“Networks need to create a standardised approach to AI visibility tracking and ensure that brands understand content publisher value and reward it accordingly.”

“Publishers are not being rewarded for the sale unless the brand is rewarding sales by coupon-code usage.”

“We’re working with brands to help them with AI visibility while having ongoing conversations about how much of our site we open up to crawlers.”

“We’d value industry-standard ways to detect AI citations & attribute downstream traffic, and clearer commercial frameworks for how editorial content should be compensated.”

“I’ve had to stop working full-time on my blog and find alternative employment because of the impacts of AI on my traffic and income. It’s been devastating.”

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Appendix 2

Examples of AI in practice

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Examples of AI in practice

Below are some examples of AI being used across APMA member companies. For more information please contact the company directly.

Acceleration Partners is helping enterprise brands understand and act on the role their affiliate programs already play in AI-generated discovery. Affiliate publisher content accounts for 20 to 40% of brand citations in AI answers across categories AP manages. AP maps existing publisher relationships against citation data, identifies topic-level visibility gaps, briefs publishers on content and narrative, and recruits new partners whose content shapes AI answers - treating AI visibility and affiliate performance as one system

Find out more.

Awin's new AI Visibility report reveals how AI-powered discovery is reshaping affiliate marketing by measuring customer journeys beyond the click. It identifies when brands are surfaced through publisher content in generative AI platforms, exposing previously invisible touchpoints that traditional attribution misses. Advertisers gain a clearer understanding of AI's contribution to consideration and sales, enabling smarter investment in the publishers, partnerships and content driving commercial performance in the AI era.

Find out more.

CJ's AI Visibility and Optimization solution transforms AI visibility insights, whether from CJ or a brand's existing monitoring tools, into activation opportunities by identifying the publishers and content shaping AI-generated recommendations. Through CJ's dedicated GEO practice, powered by expert-led media buying and direct publisher relationships, brands influence AI-driven discovery. Our measurement framework quantifies visibility lift, evaluates activation effectiveness, and connects visibility gains to business outcomes. Recent engagements show 25%+ visibility gains in just one quarter.

Find out more.

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Examples of AI in practice

Emna.ai is helping brands and affiliate marketers respond to the rise of AI search. Emna shows how brands appear across LLM platforms, highlights the publishers shaping those answers, and identifies practical content opportunities to improve visibility and share of voice. By connecting AI search insight with publisher activity, Emna.ai gives brands and publishers a scalable way to adapt as consumer discovery moves beyond traditional search.

Find out more.

There are three pillars to **impact.com's** AI strategy. Ask impact is an AI-powered assistant bringing AI support into the impact.com platform. It supports everything from reporting analysis to partner recommendations. In partnership with Evertune, AI Search Visibility allows brands to identify, measure and recruit partners that are instructional to LLM prompt responses. Finally, new developments with evidence chain signals allows brands on impact.com to connect partner influence with customer engagement across AI relevant content.

Find out more.

The **Moonpull** platform evaluates whether advertisers are setting up the framework to measure and track correctly. We have incorporated AI into our 'Ask Moonpull' reporting to more clearly highlight likely causes of tracking issues. The accompanying Anomaly Reports underpin easier conversations with affiliate managers and engineers at both brands and networks. Engineers can fix many matters quickly if they are accurately identified and explained, and Moonpull has deployed AI to achieve getting detailed and accurate explanations into their hands.

Find out more.

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Examples of AI in practice

Optimise is already AI-enabled. Our teams use ChatGPT Enterprise, a growing suite of AI-powered workflows, and our own Optimise AI Assistant to access knowledge, analyse data and deliver insights faster than before. This reduces time spent on administration and manual tasks, allowing our specialists to focus more on strategy, optimisation and commercial growth. We've also launched our Advertiser MCP connector/app, enabling brands to bring Optimise data and insights directly into their own AI environments, creating a more connected view of performance and driving efficiency gains.

Find out more.

Partnerize's VantagePoint is building the certified economic infrastructure for the machine-mediated market. While tools like Profound uncover brand visibility and discovery within AI Overviews, we close the loop. We provide the independent verification, governance, and automated compensation rails required to measure and reward that upstream, zero-click influence. We turn unmeasured AI visibility into a verifiable, boardroom-grade performance channel, ensuring premium partners are accurately compensated for shaping modern purchase decisions.

Find out more.

Trackdesk MCP Server connects AI assistants directly to your affiliate program, allowing teams to manage partnerships using natural language. Instead of navigating dashboards, users can ask AI to identify top-performing affiliates, investigate traffic drops, generate performance reports, approve conversions, create tracking links, or answer questions using live Trackdesk data. The server uses the open Model Context Protocol (MCP), making these capabilities available through AI clients such as Claude, Cursor, and Windsurf.

Find out more.

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Affiliate & Partner Marketing Association

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How AI is Reshaping Affiliate Marketing

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