Affiliate & Partner Marketing Association

2026 The New Rules of Discovery

How AI is Reshaping Affiliate Marketing

Part One: Understanding the shift

Report by the APMA AI Taskforce

July 2026

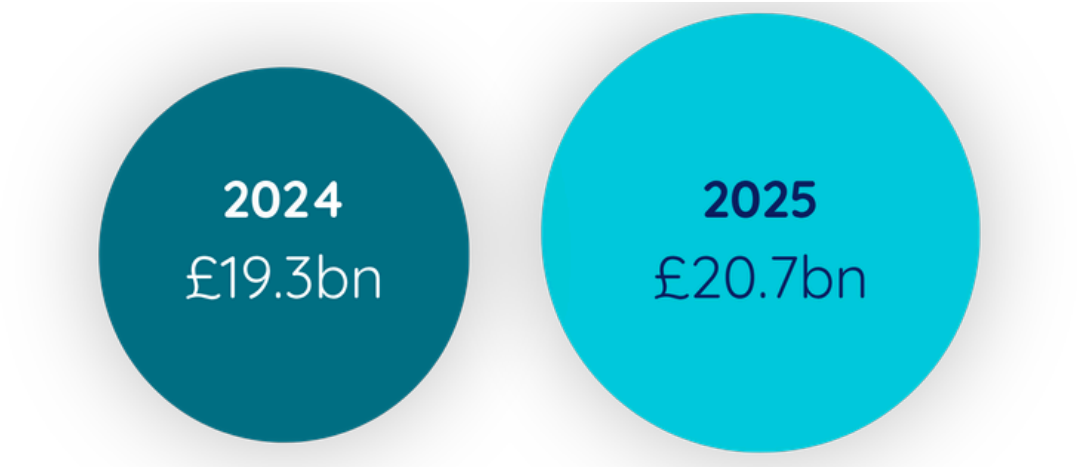


Foreword

The UK's affiliate and partner marketing industry has built its reputation on performance that can be measured.

The APMA's 2026 State of the Nation research shows an average return of sixteen pounds for every pound invested, among the strongest returns for any digital marketing channel.

The affiliate performance model continues to grow and now supports £1.8 billion in annual advertiser investment and £21 billion in ecommerce revenue. For the UK's retail and travel sectors, that means that around one in every ten pounds is spent as a result of an affiliate's content.



The core of this strength is a simple partnership model: publishers engage with consumers and drive interest in products that lead to purchases. Brands then remunerate them for their efforts. Networks and platforms offer the tracking, reporting and payment functions that oil the wheels. In some instances a management agency may also be involved.

AI is beginning to put pressure on every part of that ecosystem.

AI platforms and search engines are turning more journeys into answers. AI platforms can now shop on users' behalf. Browser-based agents are acting across the open web in ways conventional tracking was not built to see. Advertising is starting to appear inside AI conversations themselves.

The affiliate channel has adapted to disruption before; from cookie deprecation and algorithm changes to privacy regulation and economic uncertainty. It is an incredibly resilient channel with an ability for reinvention.

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But this shift is different because it affects discovery, attribution and commercial reward at the same time.

One question runs through this report: how do brands, networks and publishers value and reward influence when influence increasingly happens without a click?

Publisher content shapes the answers AI platforms now provide and increasingly monetise. The channel needs ways to recognise that contribution when no tracked click occurs.

Over the coming pages we'll set out what is happening, what it means, and what the industry can do. Some of the trends are well-evidenced; others are early signals that warrant attention rather than alarm.

We flag throughout where evidence comes from independent research, regulatory filings, trade press, or vendor-published material, and we say plainly where we think the data is thin.

What we hope will become clear is the shift in how marketers do their jobs and how consumers shop online is radically changing.

The importance of industry collaboration on tracking, measurement and commercials while putting our best foot forward when speaking to decision makers has never been clearer.

We have split this guide into three parts as we think there are three clear parts to the picture:

1. Understanding the Shift (What is changing and why it matters)
2. Measuring Influence (How attribution and measurement need to evolve)
3. Building the Future (Commercial models, regulation and what the industry should do next)

We would encourage you to read all three parts for your full understanding of the topic.

This is a living document, and we will update it to reflect the rapid pace of change across AI, search and affiliate marketing. If you have research, examples or insights that could enhance future editions, we'd love to hear from you. Please get in touch with the APMA to contribute to the next revision.

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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 has been created to ensure 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

$(\vec{n})$ Numerical

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The seven themes reshaping the affiliate industry

As AI search becomes part of everyday discovery, we've identified seven themes that are reshaping the affiliate channel.



Adoption has scaled at exceptional speed.

AI-generated answers have moved from experimental search features to mainstream consumer experiences in little more than two years. The pace of adoption has been faster than many previous shifts in digital user experience.



Open-web traffic is under pressure, especially upstream.

Search has been funnelling more journeys into closed environments for years. AI search compounds that trend by answering more queries directly in their native environments, reducing the number of users who move through to publisher sites.



Influence is decoupling from the click.

Even when users do not visit a publisher site, their content may still help shape the answer they see. Affiliate marketing's commercial model that relies on clicks struggles to recognise that contribution, creating new challenges for how the channel proves and rewards value.



Attribution is missing in the middle.

A three-layer view (retrieval, citation, outcome) is emerging as a shared language for AI-mediated journeys.

Today the industry can observe parts of the first layer, guesstimate the second, and partially capture the third. Regulatory pressure may improve publisher controls and source attribution, but end-to-end commercial attribution still depends on platform cooperation and shared standards.

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The seven themes reshaping the affiliate industry



Agentic commerce risks collapsing the journey.

Consumers are increasingly able to ask AI assistants to find, compare and purchase products on their behalf without ever visiting a retailer's website.

Because affiliate marketing has relied on users clicking from one site to another, this creates challenges for tracking and attribution. However, there are already signs that future AI-powered shopping journeys could still support affiliate attribution and rewards if these mechanisms are built into the purchasing process.



The commercial model needs to evolve, and the work has begun.

Existing affiliate frameworks miss much of the influence the channel delivers in AI search and agentic commerce.

Licensing, machine-readable terms, pay-per-crawl and fixed-fee partnerships are emerging. Similarly, 'probabilistic' contributions are being used to model commissions, but the industry is yet to work out a uniform way of rewarding value.



AI advertising creates a new attribution challenge.

Paid placements inside AI answers may become a valuable media channel, but they also risk capturing demand that publisher content helped create. Brands and networks will need to distinguish paid AI media from organic AI referrals, citations, direct traffic and affiliate clicks.

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How we got here

Conversational AI has reached mass-market scale, with ChatGPT and Google Gemini each nearing (or by some measures) exceeding a billion active users.

Research published by Which? found that **51% of UK adults** now use AI search tools to find products, services and advice online, increasing to **75% among 18–34 year olds**.[1]

Ofcom reported 1.8 billion UK visits to ChatGPT during the first eight months of 2025, almost five times the volume recorded a year earlier.[2]

Given how quickly AI search adoption is growing, these figures are likely to be significantly out of date already.

In parallel to consumer adoption, the major AI platform providers have driven fast-paced waves of innovation across AI search, agentic commerce and browser-based agents.

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These developments are now converging, with direct and indirect implications for the affiliate channel. The timeline that follows sets out the key developments since generative AI entered the mainstream.

[1] Which?, December 2025
[2] Ofcom, Online Nation, December 2025

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AI Timeline

Nov 2022
OpenAI launched ChatGPT.

> 100 million users in two months.
> Perplexity AI emerges as an answer engine with source citations.

Early 2023

> Microsoft integrated GPT-4 into Bing,
> Google announced its Search Generative Experience (SGE).
> AI search remains niche

May 2024

> Google rebranded SGE as AI Overviews; launches in US.
> By October SGE live in over 100 countries, including the UK.
> ChatGPT integrated web search.

Mid 2025

> Google launches AI Mode in the US in May; expands through the year.
> Browser-use agents from Anthropic, OpenAI, Perplexity and Google act on users' behalf in ways affiliate tracking was not built to detect.

Sept 2025

> The Really Simple Licensing standard gives publishers a way to express terms for AI use of their content.
> OpenAI and Stripe launch Instant Checkout in ChatGPT and publish the Agentic Commerce Protocol.
> It allowed US ChatGPT users to buy directly from Etsy sellers in chat.

Jan 2026

> Google announces Universal Commerce Protocol
> UK Competition and Markets Authority (CMA) consults on Google's AI search services.
> UKOM/Ipsos reports 24m UK AI-tool users
> ChatGPT accounts for 76% of time

[1] Which?, December 2025
[2] Ofcom, Online Nation, December 2025

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Feb 2026

> 900m weekly active ChatGPT users
> OpenAI tests ads in the US, launches a self-serve ads platform.
> Reuters reports projected OpenAI ad revenue will hit $2.5bn in 2026.

Mar 2026

> OpenAI pulls back from ChatGPT Checkout; shifts focus to ad-driven product discovery for brands.
> Amazon's dispute with Perplexity over browser-based shopping agents accessing Amazon product pages underlines that agentic commerce is as much a control and attribution problem as a checkout UX problem.

May 2026

> Google I/O signals a further shift towards AI-first search experiences.
> AI-generated answers, shopping assistance and agentic features are becoming more central to mainstream search.

June 2026

> CMA requires Google to provide granular controls for website owners, reporting on use of their content, and clear user-facing attribution/citation.
> Google updates Search Console visibility to show content usage in AI overviews.

Mid 2026

> Agentic commerce systems emerge in merchant platforms.
> Shopify activates agentic storefront capabilities for users
> Infrastructure providers note a sharp rise in AI crawler and bot traffic across the open web.

Two years on from the launch of Google AI Overviews, AI search has developed from a US-first beta into a global default.

For the affiliate channel, the window to adapt is now measured in quarters rather than years.

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How AI summaries are absorbing traffic

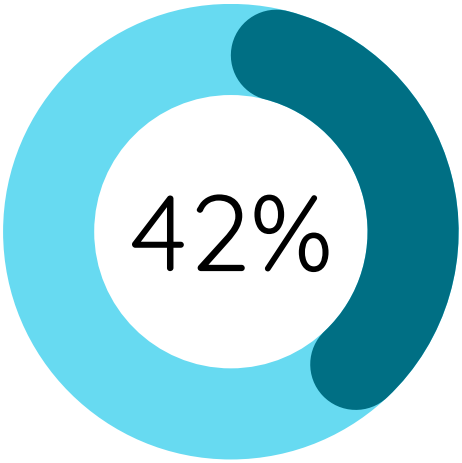
Whether driven by AI search or broader search engine changes, there is compelling evidence that the open web is under pressure.

Press Gazette, drawing on Chartbeat data from thousands of publishers, reported an approximate one-third year-on-year decline in global publisher referral traffic during 2025, with US organic search referrals down 38%. Surveyed publishers expect further declines, averaging 43% over the next three years[3].

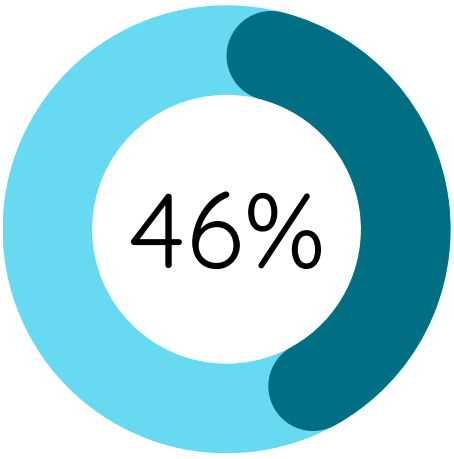
McKinsey reported in late 2025 that 20-50% of traditional web traffic is at risk and AI search is set to disrupt more than $750bn in revenue by 2028.

The APMA carried out a survey of 67 publishers in the spring of 2026 to ask various questions about the impact of AI search on their businesses:

- 42% reported Google organic search traffic had declined.
- 46% said AI search had already negatively affected traffic or earnings.
- Only a minority currently receive more than 10% of website sessions from AI platforms, suggesting AI referrals are not replacing lost Google traffic.



42% reported Google organic search traffic had declined.



46% said AI search had already negatively affected traffic or earnings.

A study published in 2025 by Pew Research Center reinforced concerns that AI summaries reduce clickthrough rates to publisher sources. Analysing nearly 69,000 Google searches,

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Pew found users were roughly half as likely to click a result when an AI summary appeared, while only around one percent clicked links within the summaries themselves[4].

Alphabet's own advertising results point in a similar direction. Search and YouTube advertising grew at double-digit rates through 2025, while the Google Network segment, which includes third-party publisher inventory largely monetised through display advertising, declined year on year[5].

Despite growing evidence of AI search's impact on publishers generally, very little independent research has examined the effect on affiliate publishers specifically. This report begins to address that evidence gap through original APMA research. Below are the broad findings from our survey, together with some quotes.

Comments from our Survey

- Content publishers report reducing editorial investment or changing commercial models as organic traffic falls.
- Brands are beginning to optimise for AI citations rather than traditional click-through rates.
- Agencies report sales occurring without affiliate clicks as LLMs surface voucher codes directly.
- Publishers increasingly say AI traffic is not replacing lost Google traffic.

"A lot of the impact on our business is from the change in Google Search, rather than the new LLMs. We've had to pivot to creating content for brands. **I foresee content publishers like us may opt for a fixed-fee commercial model** over affiliate links in the future."

"I've had to stop working full time on my blog and find alternative employment because of the impacts of AI on my blog traffic and income. **It's been devastating**."

"**Affiliate fixed-fee spend on paid content no longer has a ROAS objective**, but instead a citation count objective."

[3] https://pressgazette.co.uk/media-audience-and-business-data/google-traffic-down-2025-trends-report-2026/
[4] https://www.pewresearch.org/short-reads/2025/07/22/google-users-are-less-likely-to-click-on-links-when-an-ai-summary-appears-in-the-results/
[5] https://s206.q4cdn.com/479360582/files/doc_financials/2026/q1/Alphabet-Q1-2026-Earnings-Slides.pdf

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The crawl-to-click imbalance

Traditional search was never a perfect trade, but it usually gave publishers something in return for being indexed: visibility, traffic and routes to monetisation.

In AI search, that reciprocity is weaker because publisher content can be retrieved and summarised inside the answer itself. The user may get the information they need without visiting the source page.

To produce those answers, AI systems send automated tools to read, copy or retrieve publisher pages in real time.

These automated visits are usually described as crawls.

Cloudflare, a major web infrastructure provider, has recently tried to quantify the exchange between AI platforms and content publishers. Its crawl-to-referral ratio compares how often platforms access publisher pages with how often they send users back. By doing so, it gives publishers a way to compare platforms directly: which systems still resemble traditional search, and which consume content at far greater scale than they return traffic.

In its August 2025 The crawl-to-click gap analysis[6], Cloudflare identified significant differences between major platforms:

- Google remained closest to the traditional search model, with roughly five crawls for every referral.
- Perplexity crawled publisher pages hundreds of times for every visit it returned.
- OpenAI crawled more than one thousand times for every returned visit.
- Anthropic c.38,000 crawls for every referral.
- Meta sent effectively no referral traffic.

Anthropic crawls an average of 38,000 pages for every referral.

Publishers should expect these ratios to continue to change as AI products develop. But as a moment-in-time snapshot, they show many AI platforms accessing publisher content at a scale that far exceeds the traffic they return.

[6] https://blog.cloudflare.com/crawlers-click-ai-bots-training/

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Where the pressure is likely to fall hardest

Just as each AI platform's crawl-to-referral ratio differs, the impact of AI search is unlikely to be felt evenly across the discovery to conversion lifecycle.

Measuring that impact is itself a challenge for the industry. Google has confirmed the scale of AI Overviews, reporting over 2.5 billion monthly active users as of May 2026[7], up from 1.5 billion a year earlier. It has not, however, disclosed what proportion of searches trigger one.

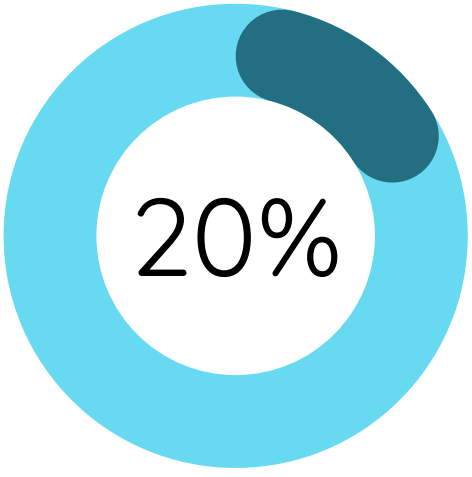
In the absence of an official figure, a wide range of third-party studies have independently attempted to measure AI Overview presence. Their findings vary:

- Pew Research Center, analysing the real search behaviour of 900 US adults (March 2025), found AI summaries on 18% of searches[8].
- Ahrefs, crawling 146 million search results (late 2025), found 20.5%[9].
- Commercially weighted keyword analysis from BrightEdge (February 2026) reported 48% presence, with significant variations across sectors[10].
- Peec AI, sampling 500,000 commercial prompts with navigational queries excluded (April 2026), found AI Overviews present on 87% of searches[11].

Although insightful, each of these studies differs in scope, and as a result, the industry currently has no shared baseline for AI overview presence.

In our AI search survey, we asked publishers how they are currently monitoring AI search and AI crawlers.

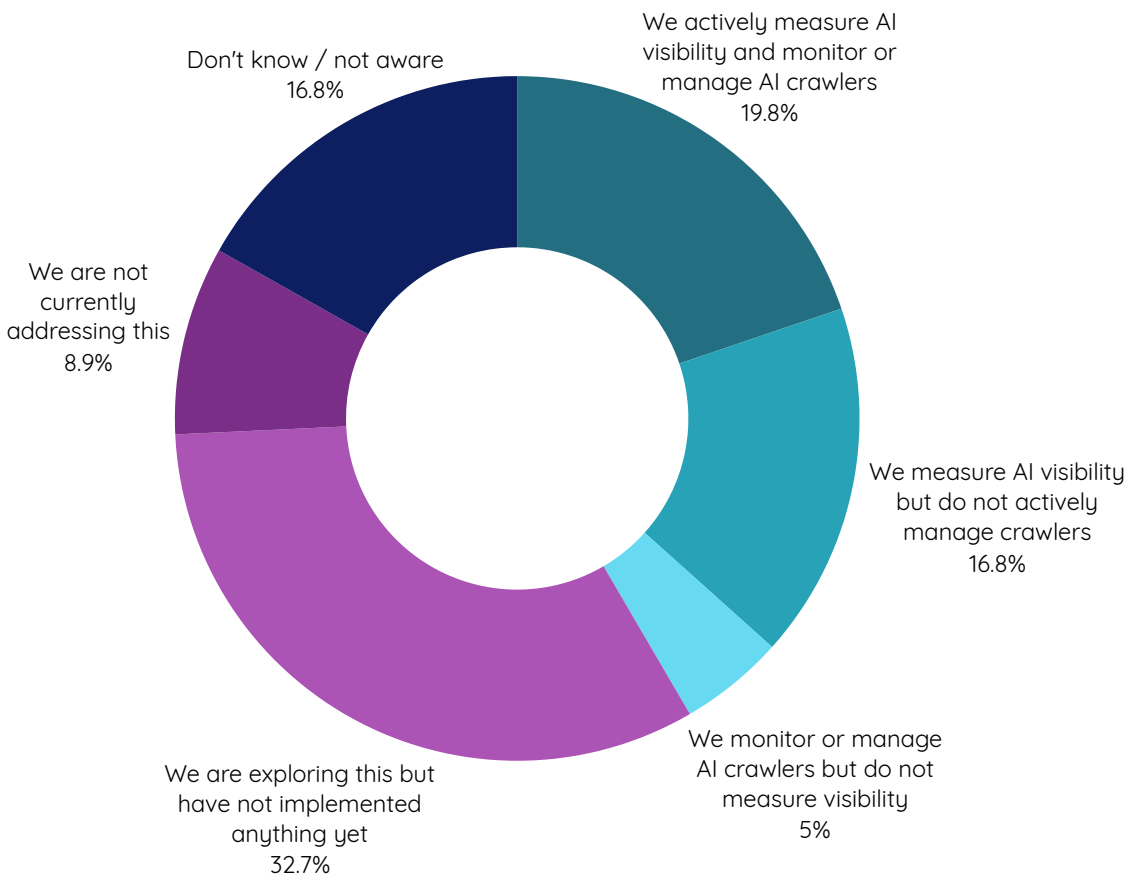
We had 66 responses to the question, "Which of the following best describes your current approach to measuring and managing AI-driven visibility (e.g. citations). Only 20% of publishers stated they "actively measure AI visibility **and** monitor or manage AI crawlers".



[7] https://blog.google/innovation-and-ai/sundar-pichai-io-2026/
[8] https://www.pewresearch.org/short-reads/2025/07/22/google-users-are-less-likely-to-click-on-links-when-an-ai-summary-appears-in-the-results/
[9] https://ahrefs.com/blog/ai-overview-triggers/
[10] https://www.brightedge.com/resources/weekly-ai-search-insights/ai-overviews-one-year-presence-size-citing
[11] https://peec.ai/blog/ai-overviews-is-the-most-undertracked-ai-search-500-000-prompts-show-why

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Q5. Which of the following best describes your current approach to measuring and managing AI-driven visibility (e.g. citations)? n=66 responses



There may be a broader indicative pattern across these studies. AI summaries appear more likely to trigger on longer, research-led queries:

- Ahrefs found AI Overviews on 46% of queries containing seven or more words, but on fewer than 10% of single-word searches[12].
- Pew Research Center found that question-based searches triggered an AI summary 60% of the time[13], while searches of ten or more words did so 53% of the time. By contrast, searches of one or two words triggered a summary in only 8% of cases.
- Peec AI, found AI Overviews present on 88.5% of decision-stage prompts, including product comparisons and category research[14].

These studies point to the same risk for content publishers: AI summaries are most likely to appear on the research-stage searches that historically send users to affiliate-monetised comparison articles, "best of" guides and expert reviews.

[12] https://ahrefs.com/blog/ai-overview-triggers/
[13] https://www.pewresearch.org/short-reads/2025/07/22/google-users-are-less-likely-to-click-on-links-when-an-ai-summary-appears-in-the-results/
[14] https://peec.ai/blog/ai-overviews-is-the-most-undertracked-ai-search-500-000-prompts-show-why

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At the transactional end of the funnel, AI summaries appear less often. Semrush's study of full-year 2025[15] data, published in December 2025, found them on fewer than 3% of shopping keywords. One potential reason is that commercial product SERPs are already heavily occupied by platform-monetised Shopping ads, merchant listings and other paid placements, leaving less space and less incentive for long-form publisher content to be summarised.

However, recent announcements from both Google and OpenAI indicate that commercial search is also being rebuilt around integrated brand product data, offers and checkout.

In 2026, Google previewed Merchant Center tools for AI-surface visibility and conversational product attributes, alongside AI-powered Shopping ads, expanded Direct Offers and checkout features linked to product feeds.

OpenAI has announced similar developments in ChatGPT shopping, adding richer visual product discovery and side-by-side comparison. Merchants can also share structured product data so products can appear more accurately in relevant shopping conversations.

For CSS, comparison and incentive-led publishers, the implication is that transactional search may be less exposed to AI summaries today compared to content sites, but AI platforms are actively moving into the last-click layer of the consumer funnel.

Which sources gain visibility in AI search?

The pressure is not only uneven across the funnel. AI search also appears to be changing which sources are surfaced in the first place.

The clearest finding comes from a peer-reviewed study[16] presented at SIGIR '26, which compared sources retrieved by Google Search, AI Overviews and Gemini across 11,500 queries.

It found that each system retrieves substantially different sources for the same query, with only around 18 percent overlap between AI Overview citations and traditional search results.

[15] https://searchengineland.com/google-ai-overviews-surge-pullback-data-466314
[16] https://web.njit.edu/~borcea/papers/acm-sigir26.pdf

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Google's own documentation points in the same direction. Its AI Mode uses a "query fan-out" technique, breaking a query into multiple related searches and surfacing a wider set of links than a conventional search results page.

The important point for publishers is that visibility in traditional search rankings does not guarantee visibility within AI-generated responses.

In practice, two users asking the same question through Google Search and Google's AI products may be exposed to different sources of information.

That could create openings for publishers with deep category expertise.

Product testing, comparison guides and specialist buying advice may be useful to AI systems even where those pages would not dominate a conventional results page.

But a broader citation base should not be mistaken for a healthier discovery economy. Visibility only matters if value flows back to the publishers producing the material. If AI search expands the range of sources it cites while capturing the commercial return elsewhere, it may broaden visibility in the short term while weakening the economics of original content over the long term.

That would eventually hurt AI platforms too, because real-time AI search depends on reliable, current and commercially sustainable source material.

Google has consistently advised publishers that there is no need to optimise separately for AI search. However, if the rules are the same, greater transparency may be needed to help publishers understand why visibility outcomes differ so substantially.

This could be something regulators take note of and want to understand more fully as they seek to ensure the UK's publishing economy thrives in the next phase of AI search.

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What does all this mean for publishers in 2026?

Taken individually, many of these developments appear manageable:

- Traffic declines have happened before. Search has evolved countless times. New technologies have repeatedly reshaped digital marketing.
- Taken together, however, they describe something much larger.
- Publisher influence is increasingly happening in places where the affiliate ecosystem cannot easily observe it.
- Content is being retrieved, summarised and used to inform purchasing decisions long before — or sometimes instead of — a measurable click. At the same time, AI platforms are becoming destinations in their own right, compressing journeys that previously moved across multiple websites.
- The challenge is no longer simply maintaining traffic. It is understanding how value flows when the customer journey itself is being rebuilt.

That raises the industry's next question: if influence is becoming less visible, how can it be measured?

Find out in Part Two of 'The New Rules of Discovery: How AI is Reshaping Affiliate Marketing'.

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Appendix 1

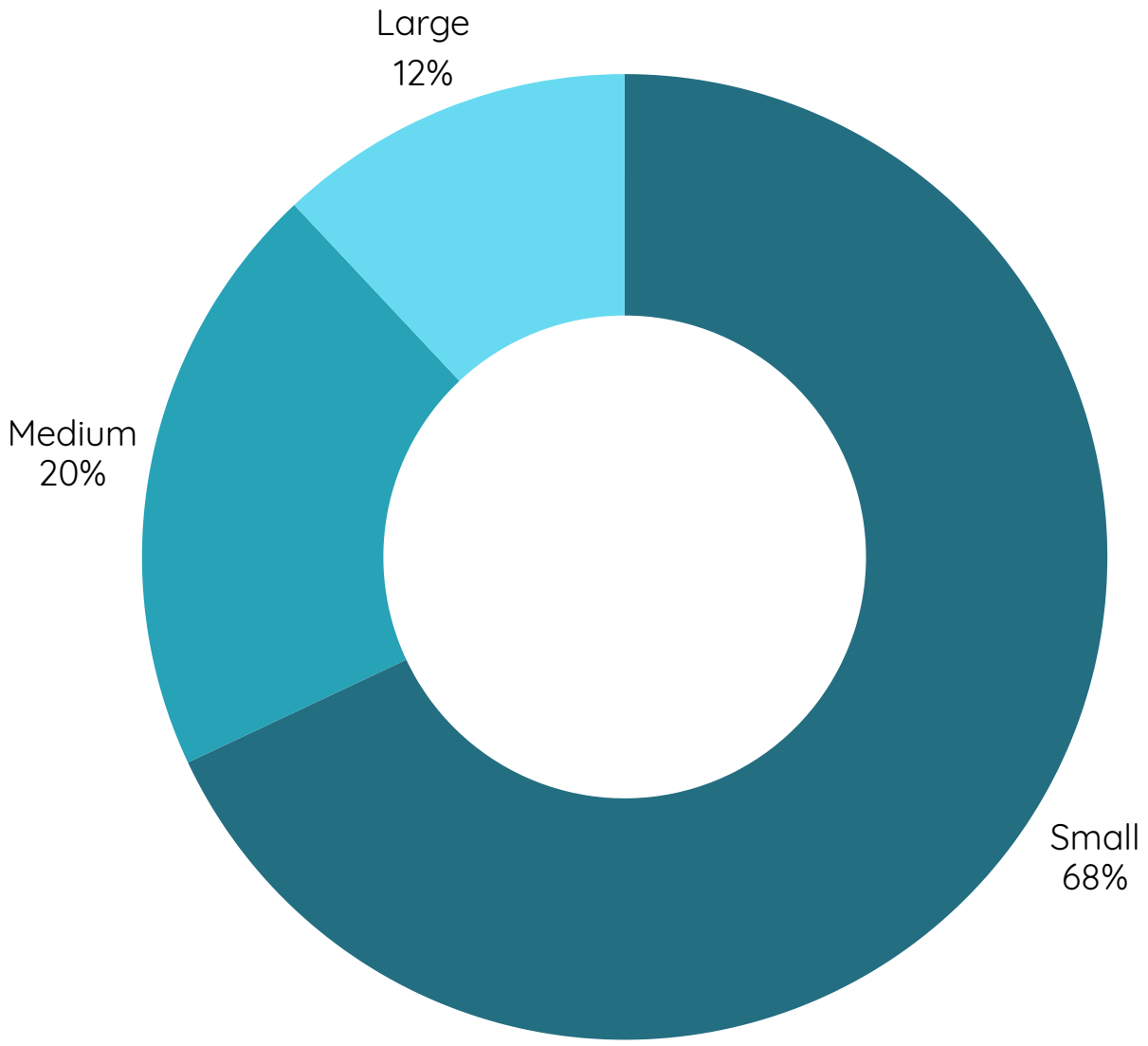
Charts & Graphs from the APMA Publisher Survey

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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?



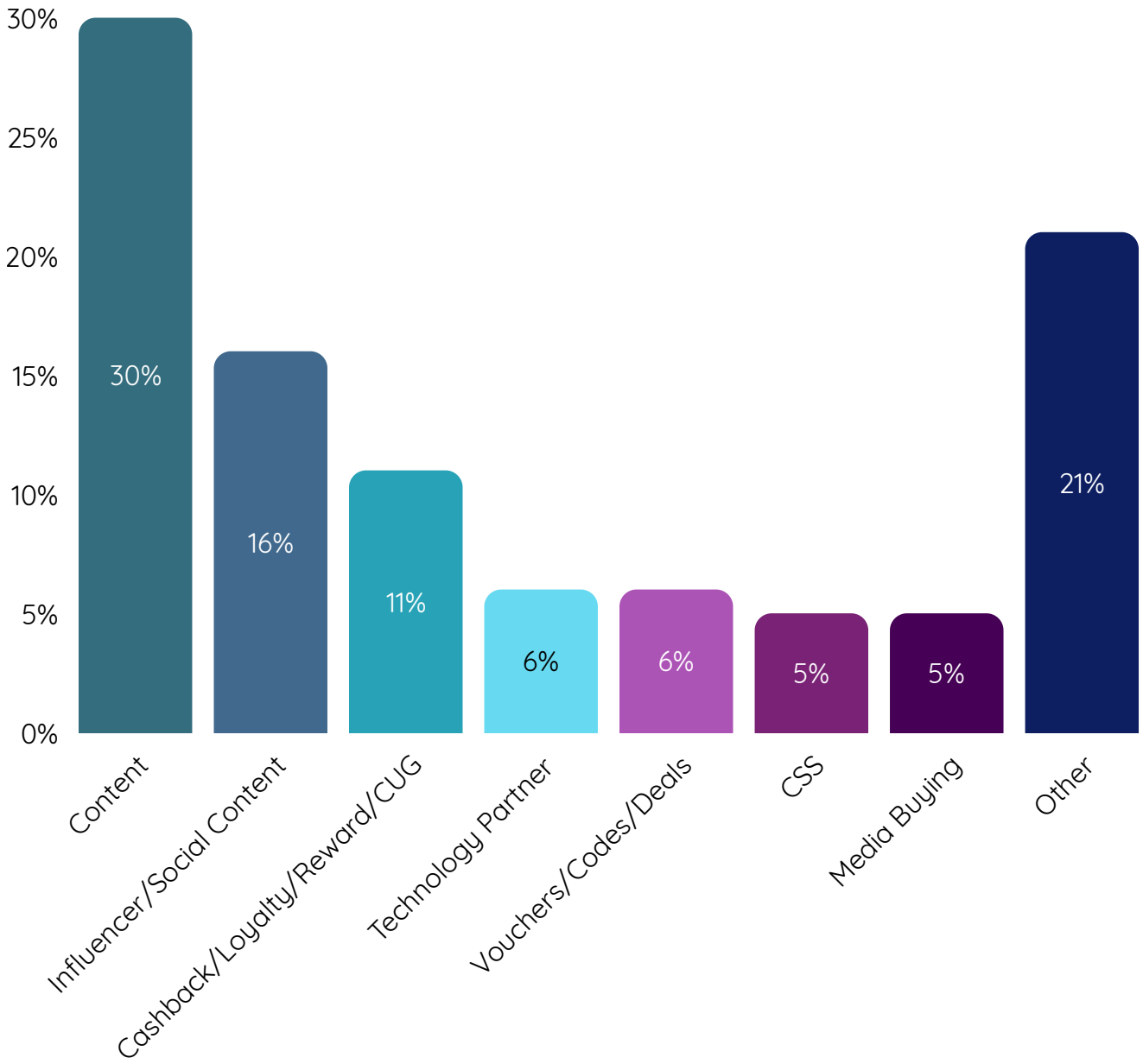
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Q. What best describes what your business does?



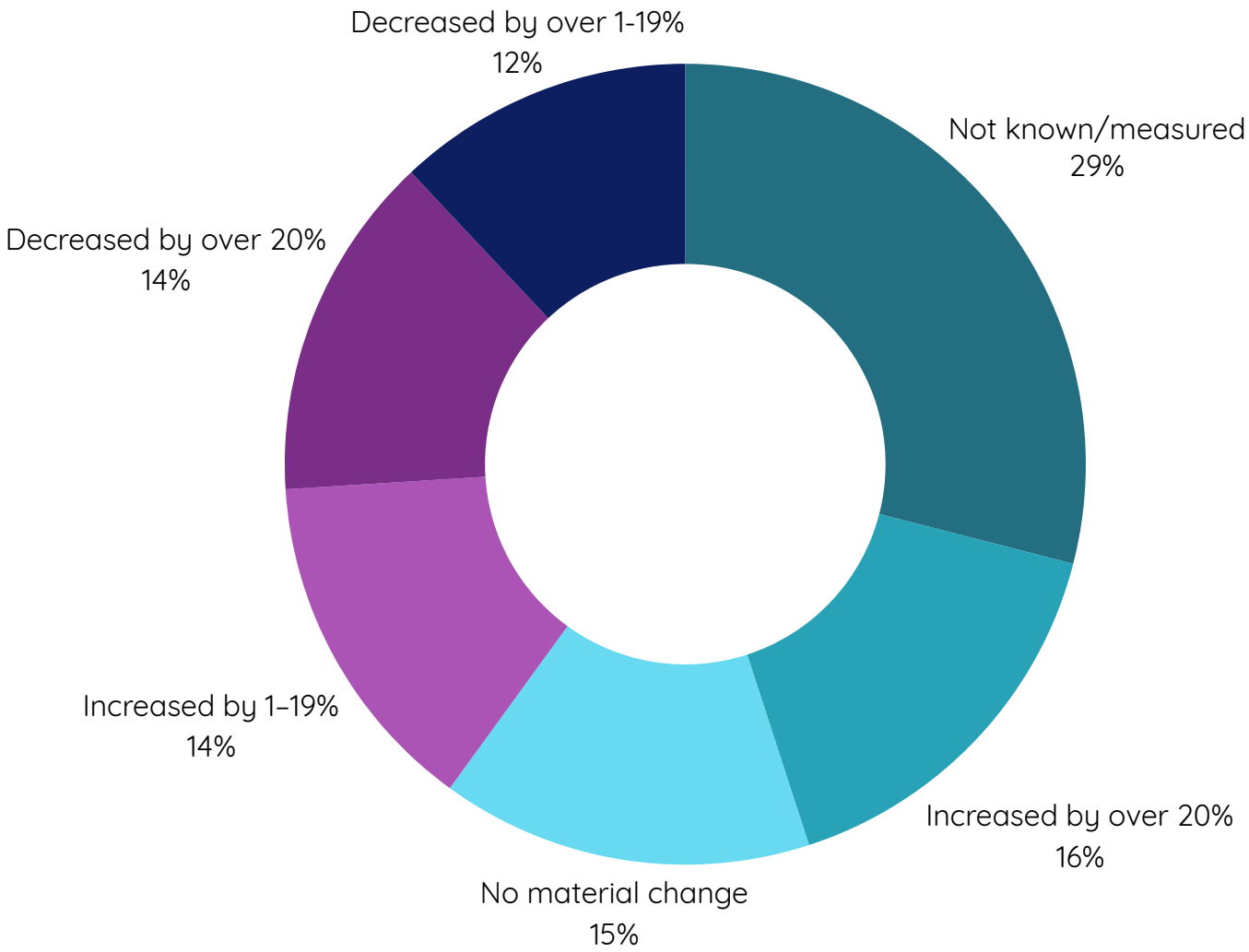
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Q. Over the past 12 months how has your total organic search traffic from Google Search changed based on your analytics platform?



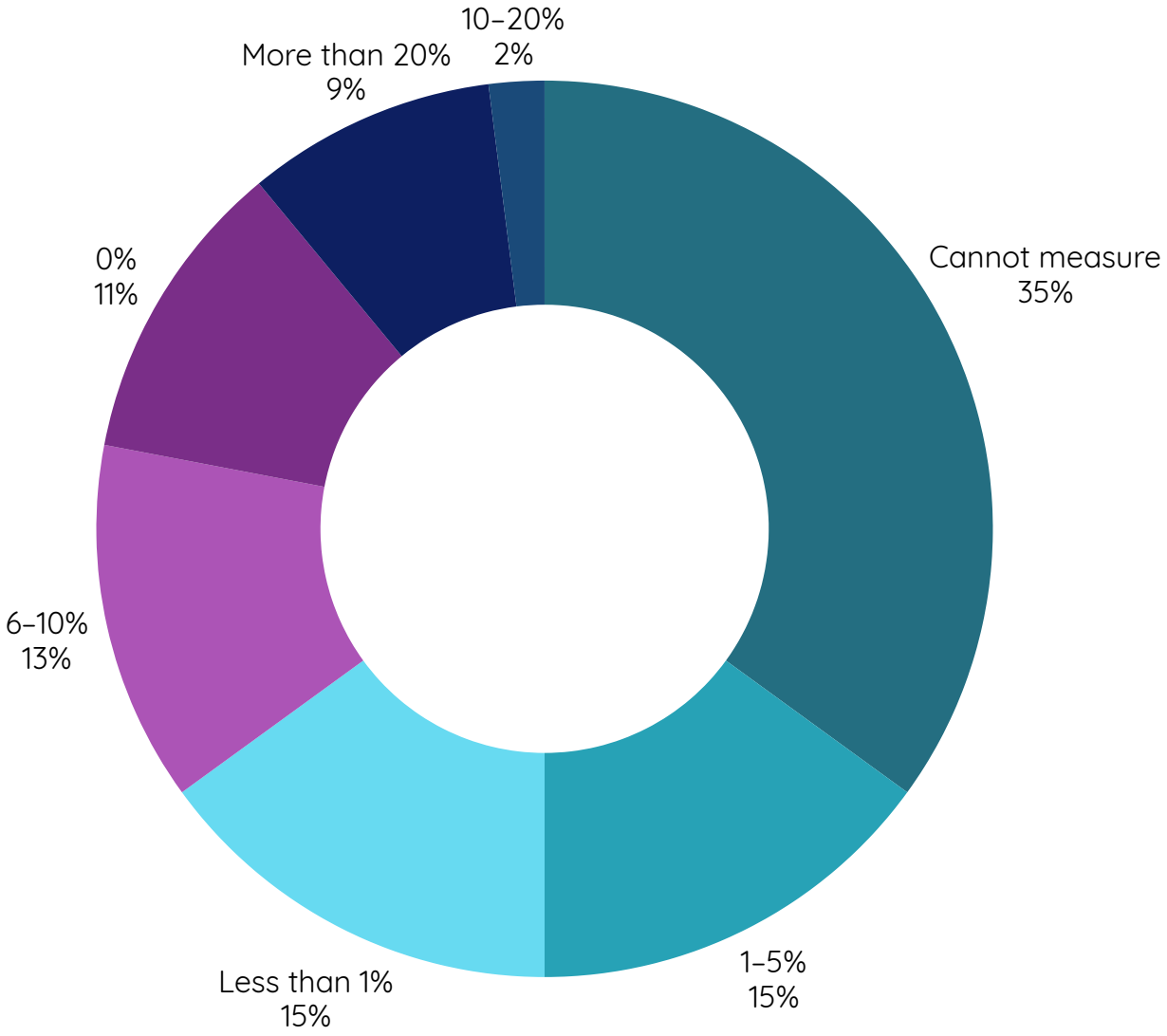
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Q. Approximately what percentage of your total website sessions currently originates from AI-driven search or answer platforms, based on your referral or attribution data? (Consider all systems such as ChatGPT, Claude, Gemini, etc.)?



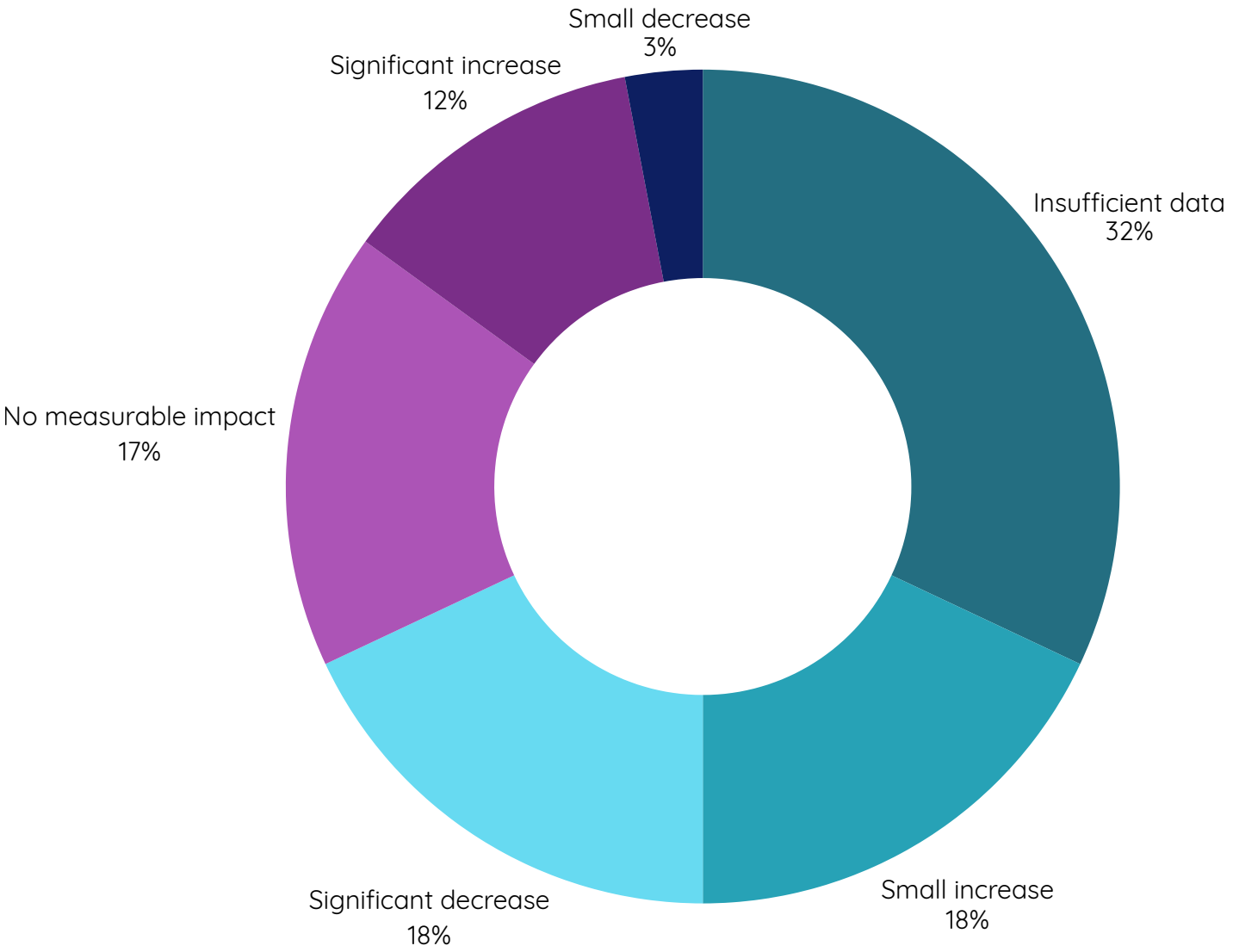
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The survey sought to understand how AI Search is impacting UK publishers across tracking, traffic, measurement and remuneration.

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?



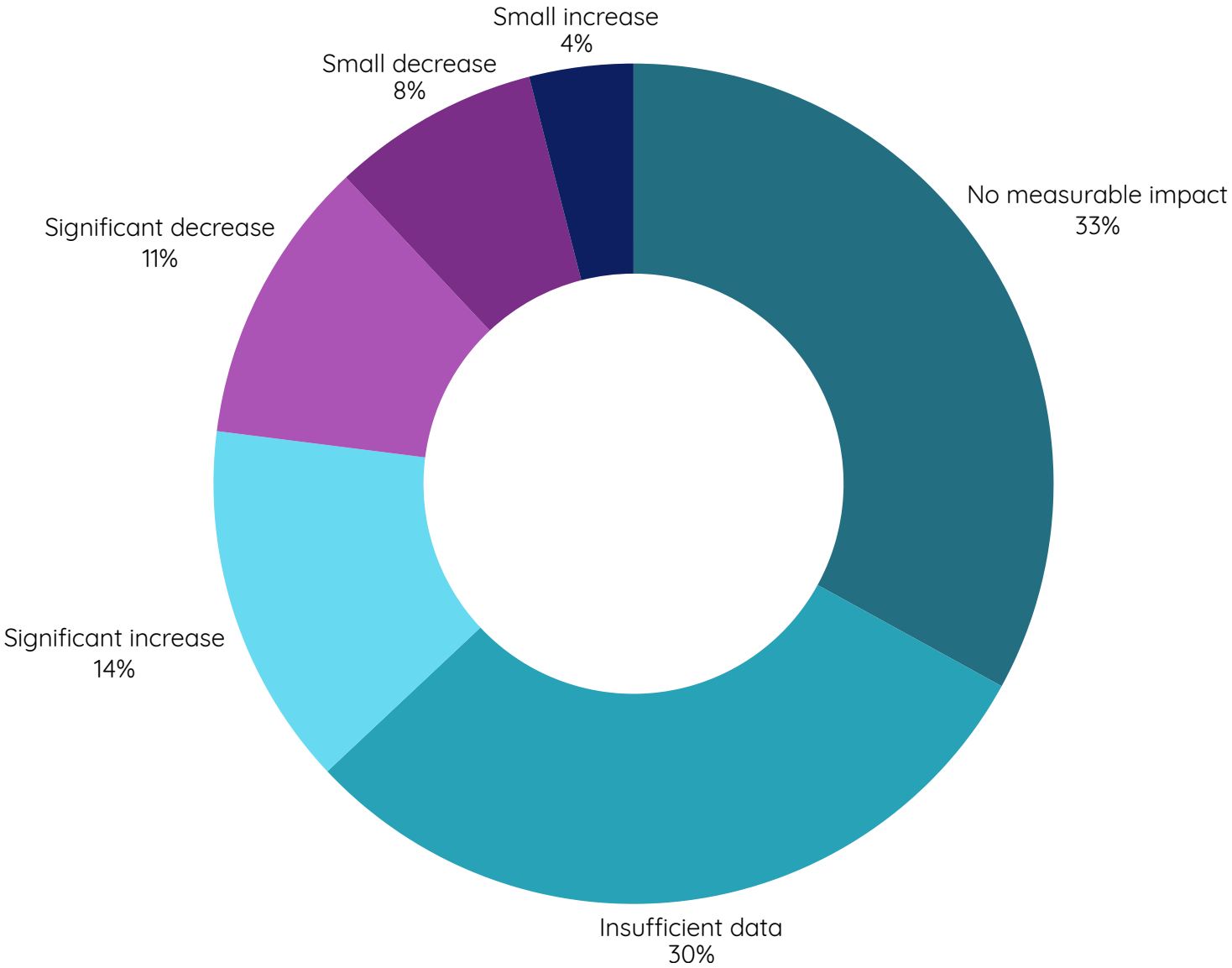
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Charts & Graphs from the APMA Publisher Survey

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. 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?



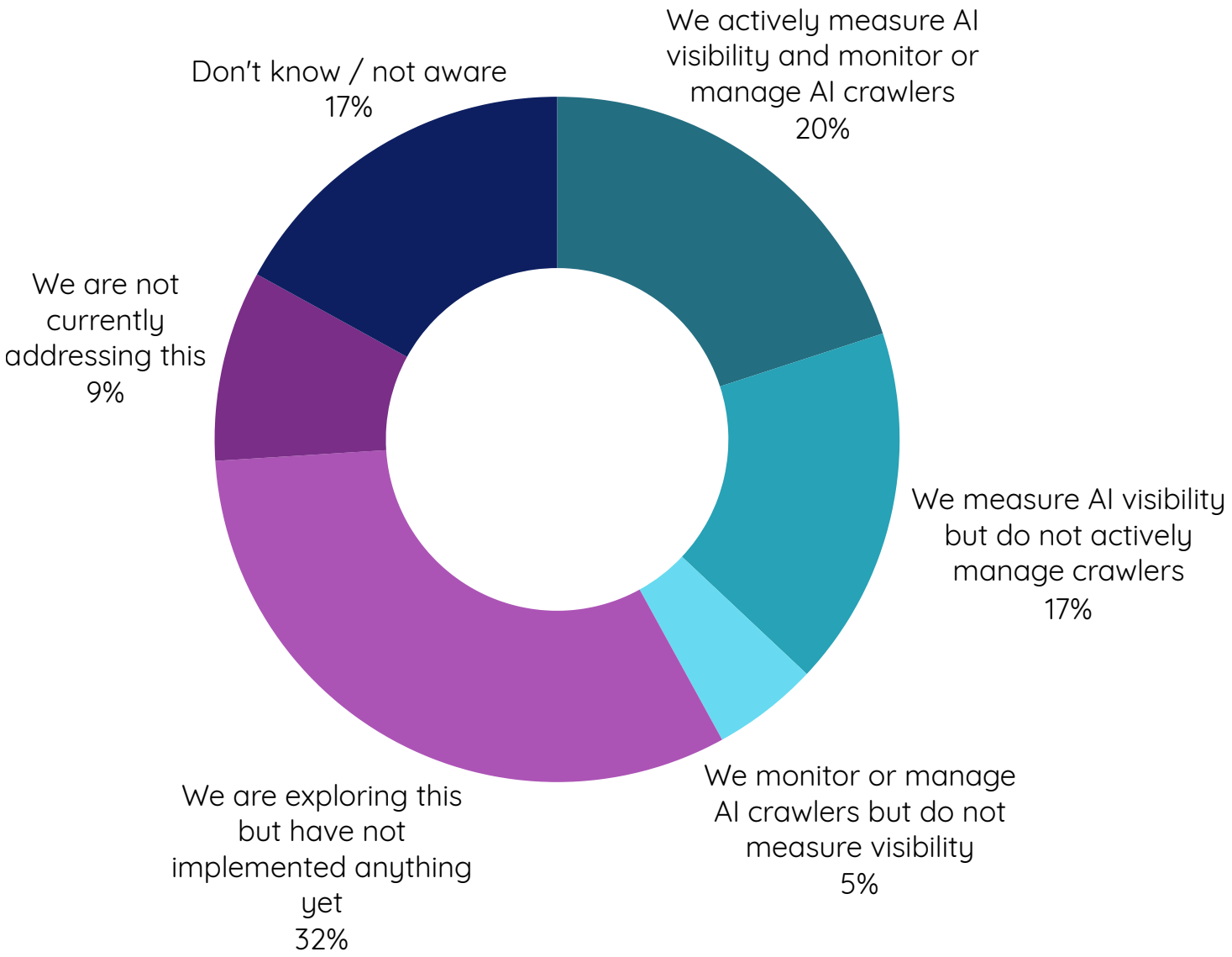
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Q. Which of the following best describes your current approach to measuring and managing AI-driven visibility (e.g. citations)?



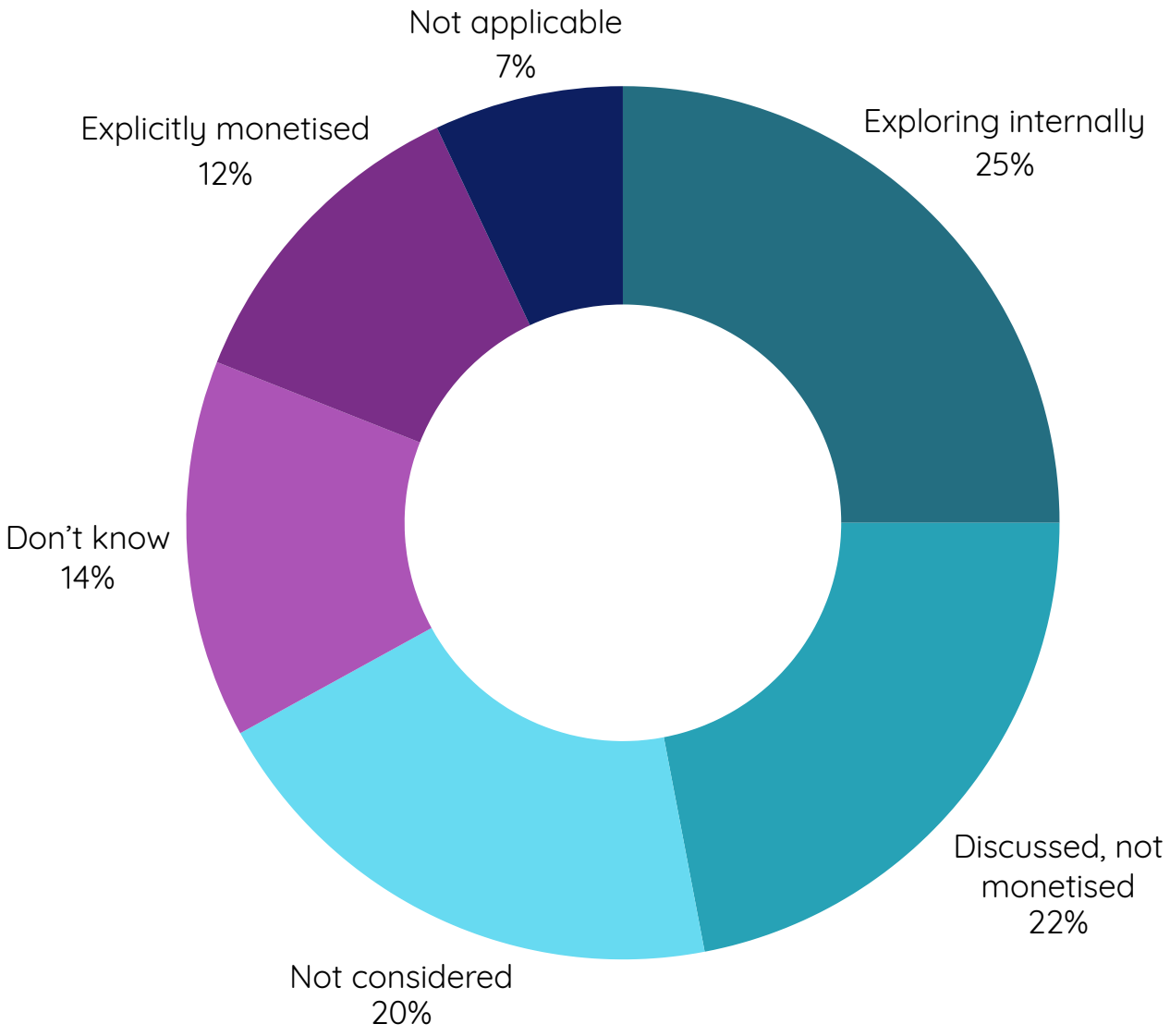
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Q. How, if at all, is AI-driven visibility (e.g. citations) currently included in the way you operate commercially?



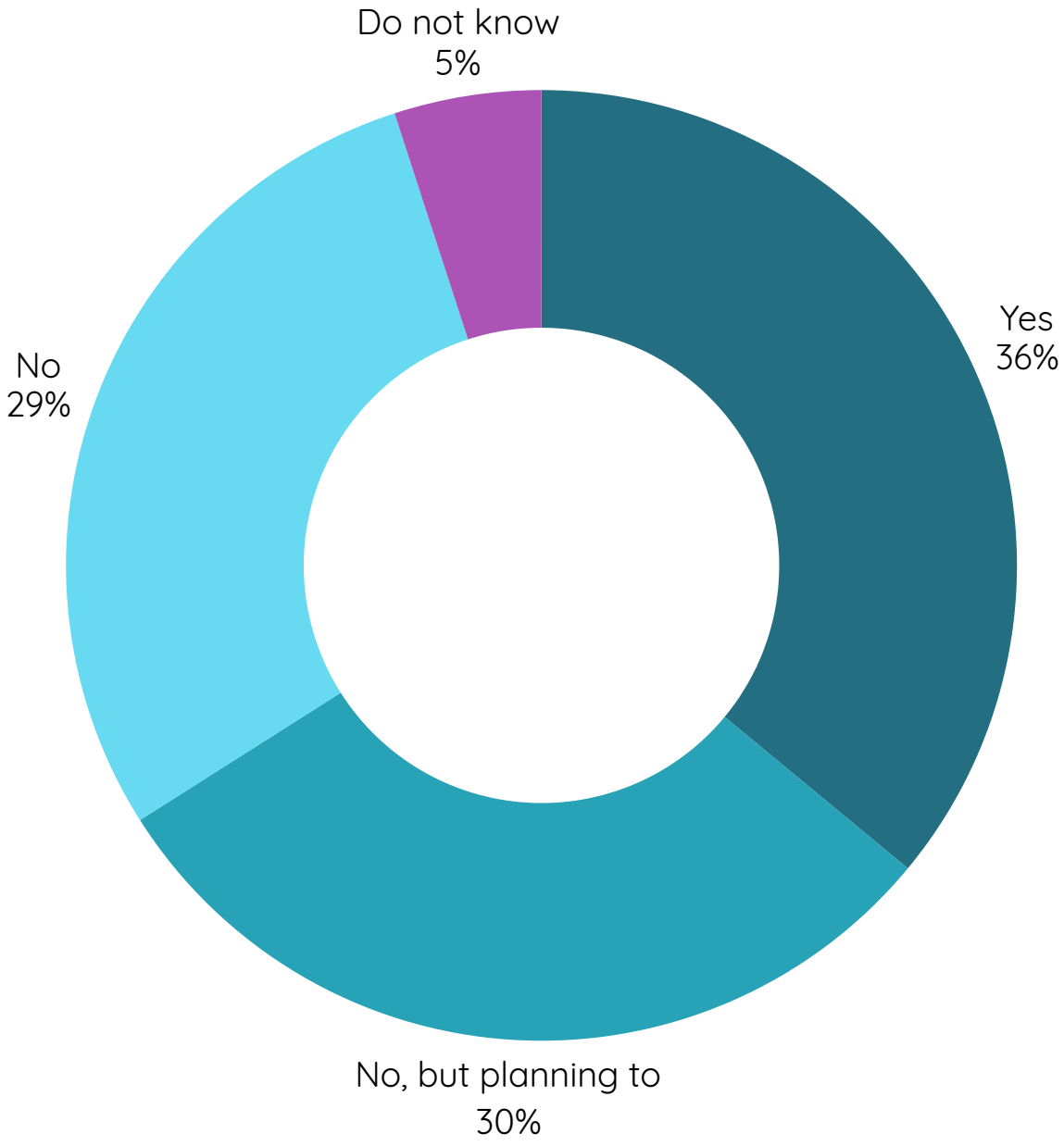
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Q. Are you using AI to engage with your audience directly?



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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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Affiliate & Partner Marketing Association

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How AI is Reshaping Affiliate Marketing

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