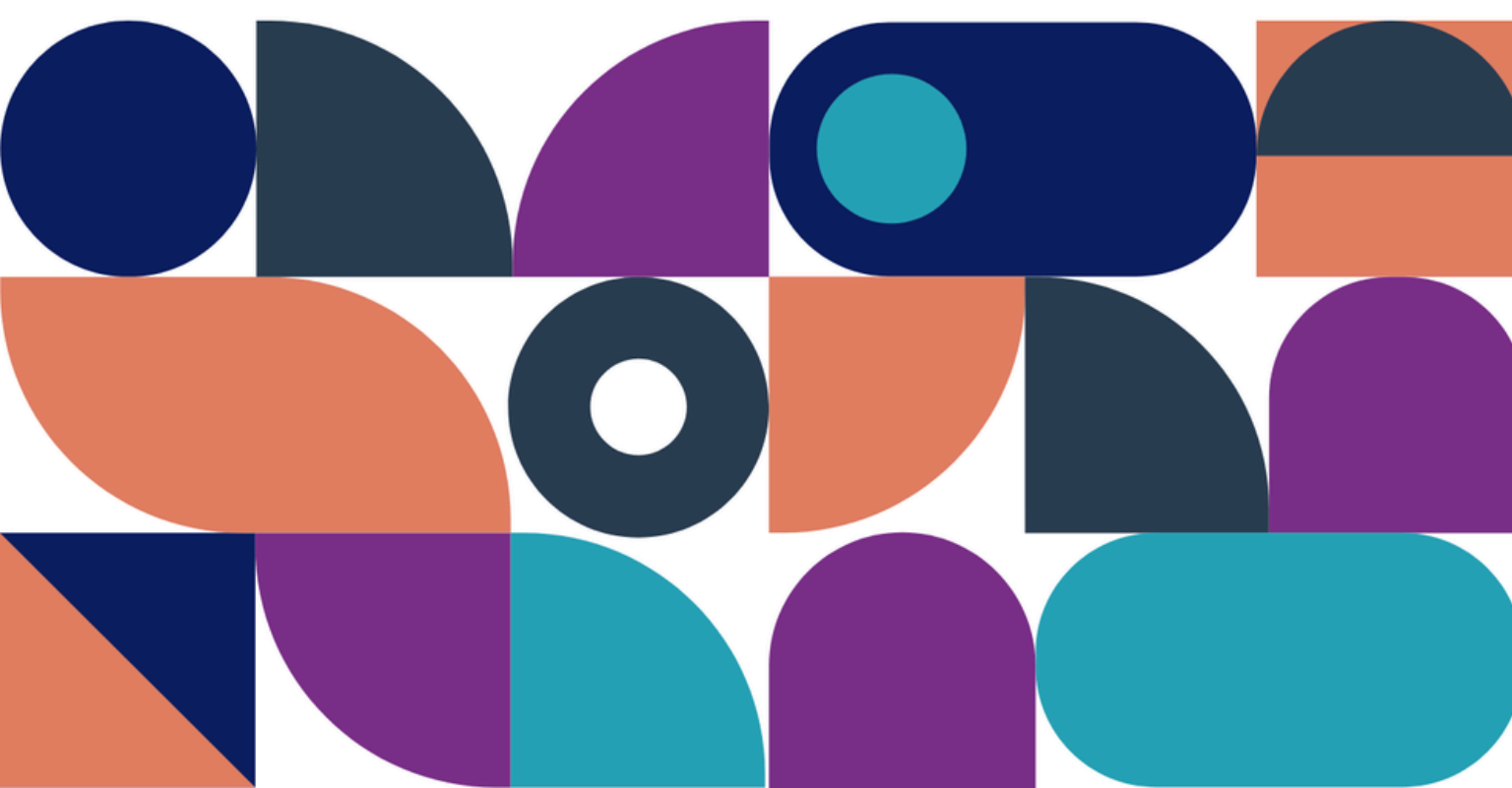


Voice of the Affiliate Nation 2025

A study taking the pulse of the UK's affiliate
and partner marketing industries



What do brands, agencies and publishers think about AI...?



In the summer of 2025, the Affiliate & Partner Marketing Association asked 284 affiliate marketers about their attitudes to AI.

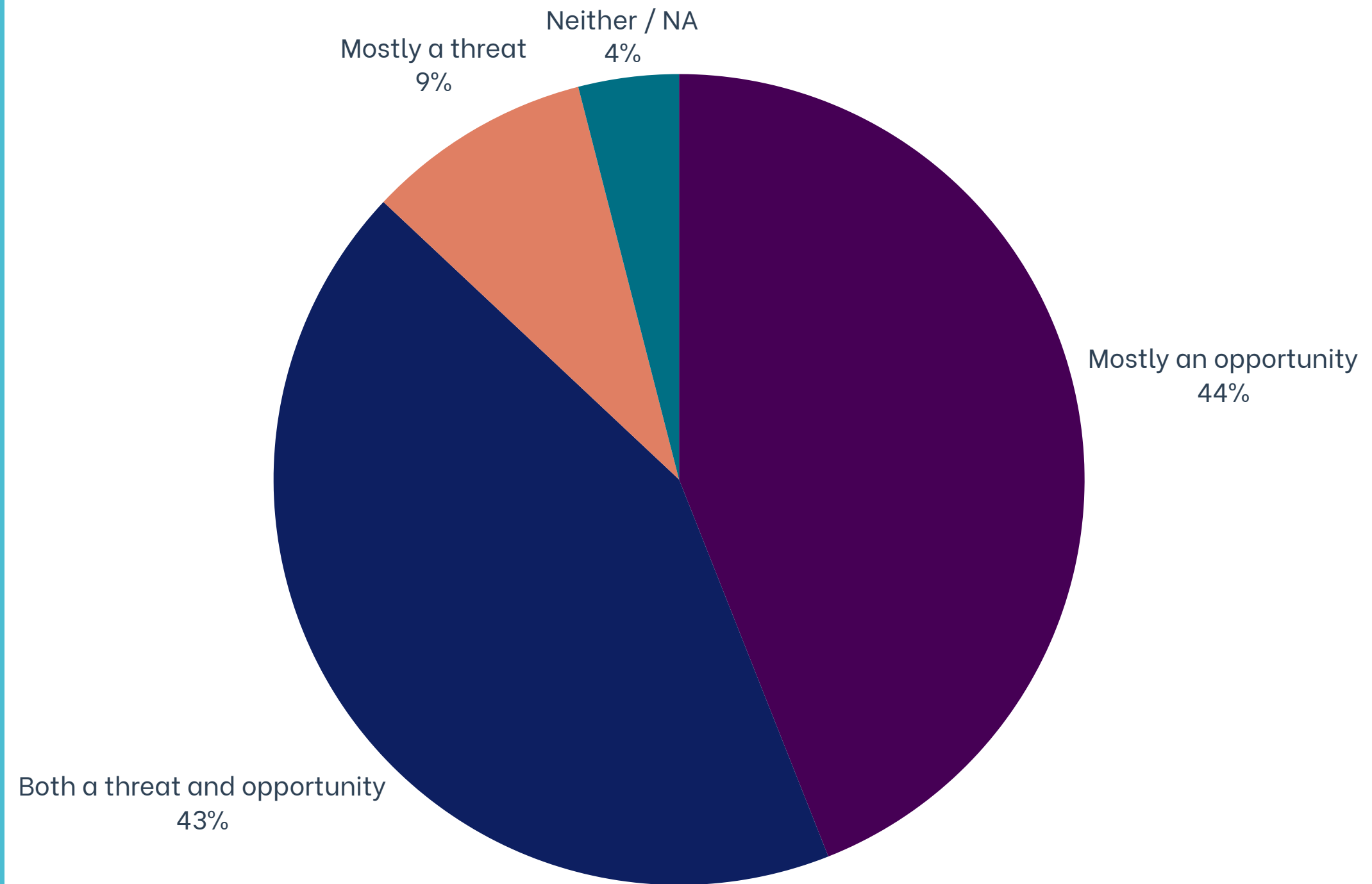
We also asked APMA members for their views on LLMs shifting towards zero-click transactions in their chat functions.

Ahead of the release of the Voice of the Affiliate Nation, here's what they had to say...

Is AI a threat or opportunity to your business over the next 12-24 months...?

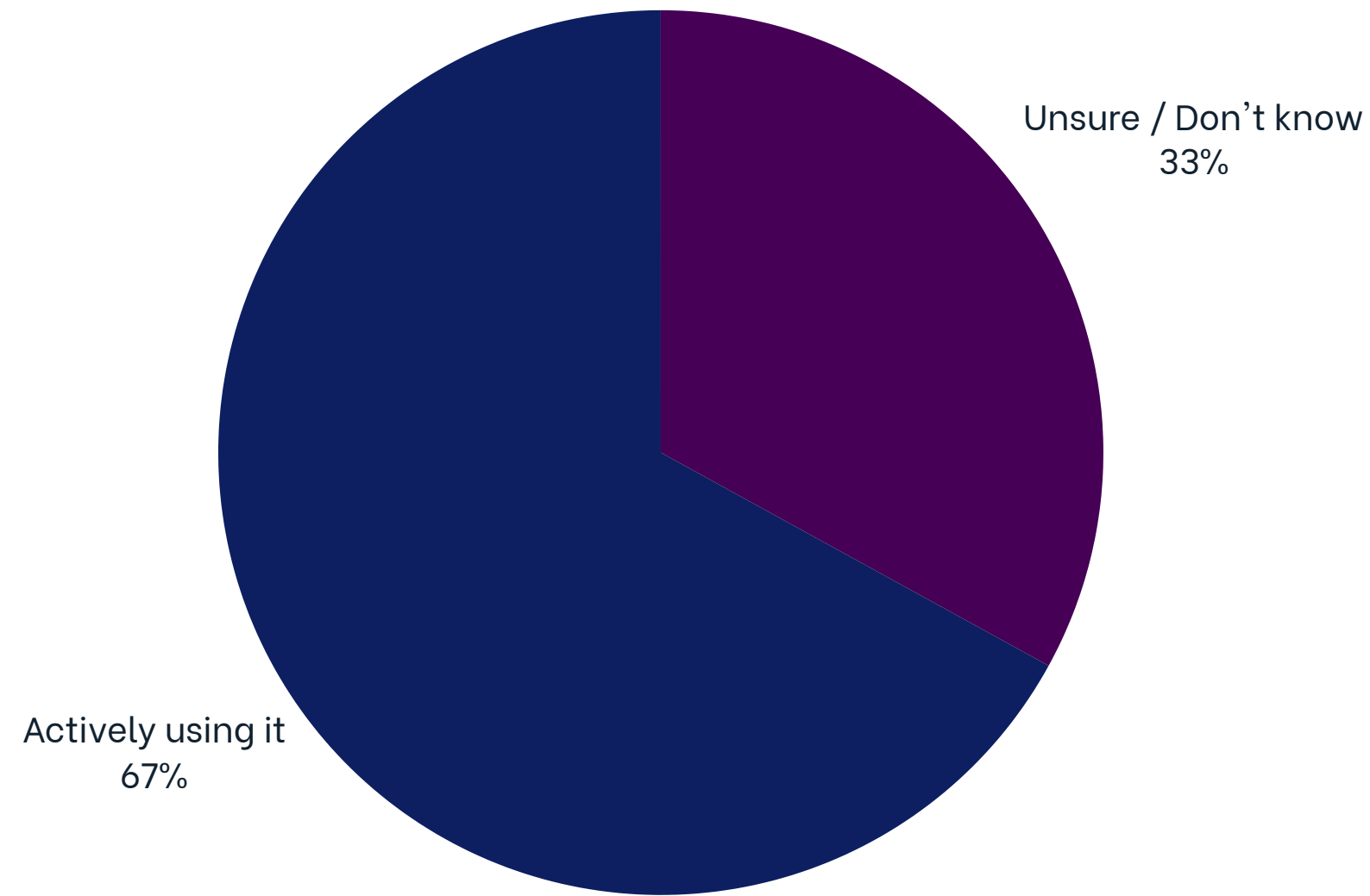
Close to half of UK publishers see AI as a straight-up opportunity, with a similar amount seeing some opportunity but acknowledging the threat it presents of affiliates being cut out in a zero-click environment. Or perhaps they fear their content will be scraped with little or no reward...

Only one in 11 affiliates see AI as a threat, again proving that affiliates are not daunted by new tech opportunities.



109 affiliates responded to this question.

2/3 of respondents are actively using AI in their work



Taken from 175 responses across three surveys (109 respondents didn't answer this question).

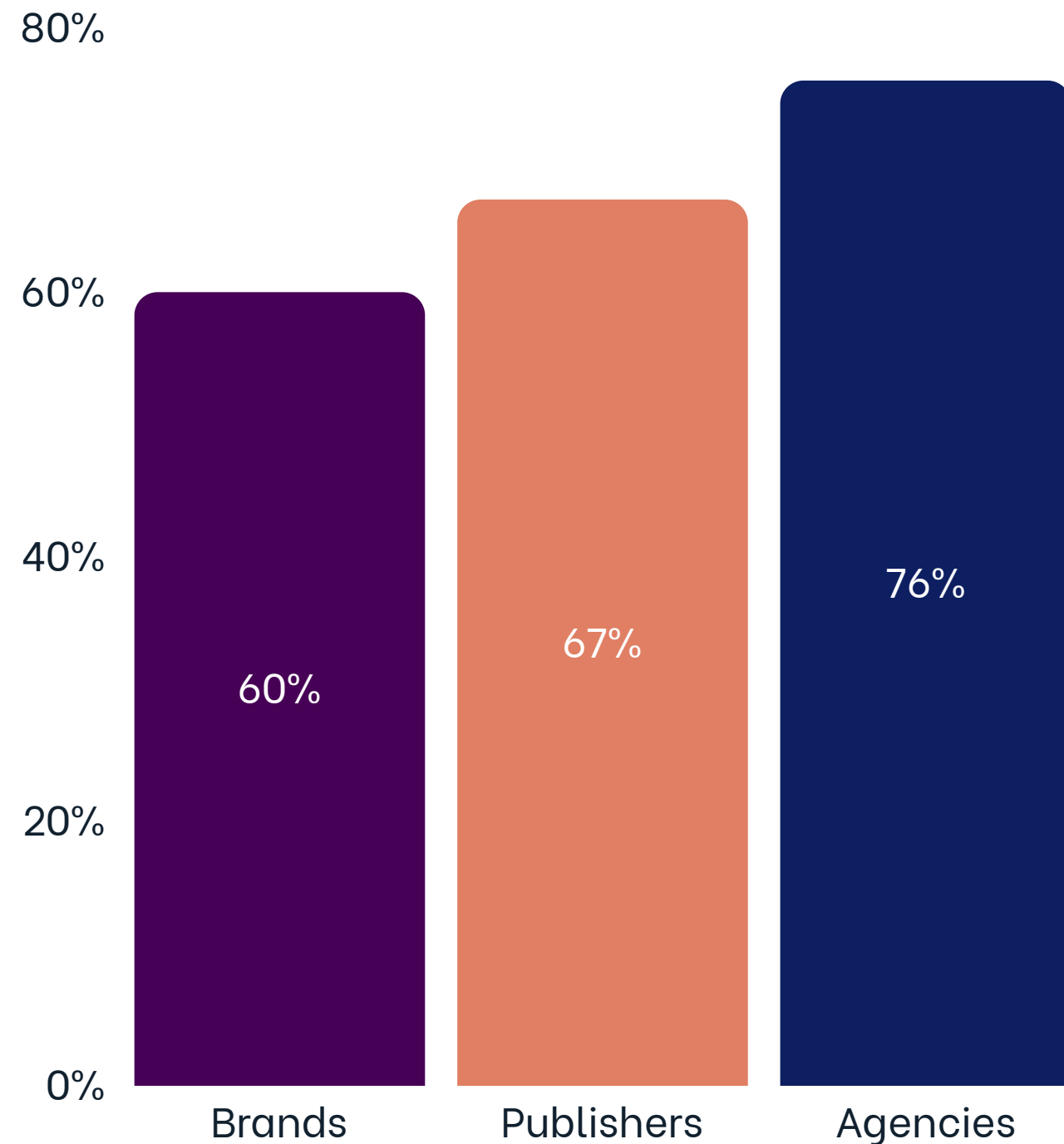
Around two-thirds of respondents who answered the question are already actively using AI within their affiliate activity.

The remaining third referenced AI in broad or exploratory terms. Their answers often conveyed awareness, curiosity, or recognition of AI's growing importance, but lacked concrete examples of implementation or testing.

Common phrases included:

- "AI will become important for everyone."
- "We're watching developments closely."
- "Not yet using it, but it's something we'll explore."
- "No specific use cases at the moment."
-

In short, this final third represents a group with strong awareness but limited practical engagement, a sign of latent adoption potential as AI tools become more accessible and proven within the channel.



Taken from 175 responses across three surveys.

This lack of certainty skews more towards brands

Of the 175 who answered this question, this is how it breaks down:

Publishers (67% active): The majority are now applying AI in specific ways, typically to reporting, campaign optimisation, or creative generation, though a third still describe their approach as exploratory.

Brands (60% active): Adoption is growing but remains uneven. Four in ten brands continue to speak about AI in broad or strategic terms rather than describing concrete implementations.

Agencies (76% active): The most advanced cohort. Over three-quarters are already using AI operationally, especially for reporting, efficiency, and recruitment tasks.

In short, AI awareness is universal, but maturity differs. The variance highlights an opportunity for education, knowledge-sharing, and practical case studies to help convert awareness into consistent adoption across the ecosystem.

What are the main uses?

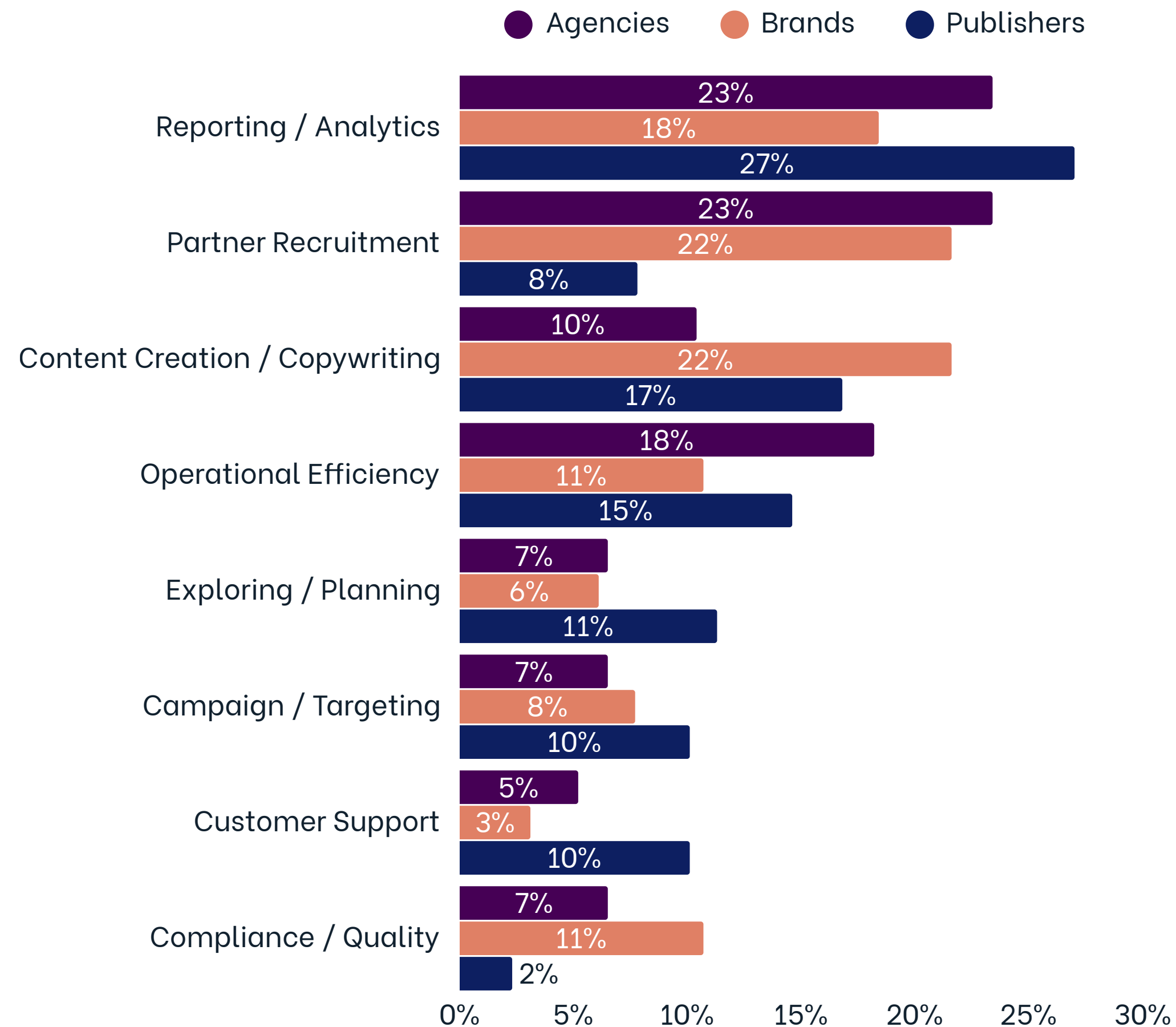
Among the 175 respondents who described their approach to AI, there were 284 separate mentions of how it is being used or explored.

This reflects the fact that many participants cited multiple applications within a single response, for example, using AI for reporting and analytics, content generation, and partner recruitment simultaneously.

The chart on the left aggregates these mentions to reveal the most common areas of focus:

- Reporting and analytics remain the leading application, particularly among publishers.
- Partner recruitment and content creation are gaining ground as practical, everyday uses.
- Operational efficiency and campaign targeting show steady uptake, while compliance and customer support are emerging but less widespread.

Experimentation and integration are already underway across the affiliate ecosystem.



Taken from 284 responses across three surveys.

Publishers: How are you currently investing in or planning to invest in AI to support your business and affiliate offering?

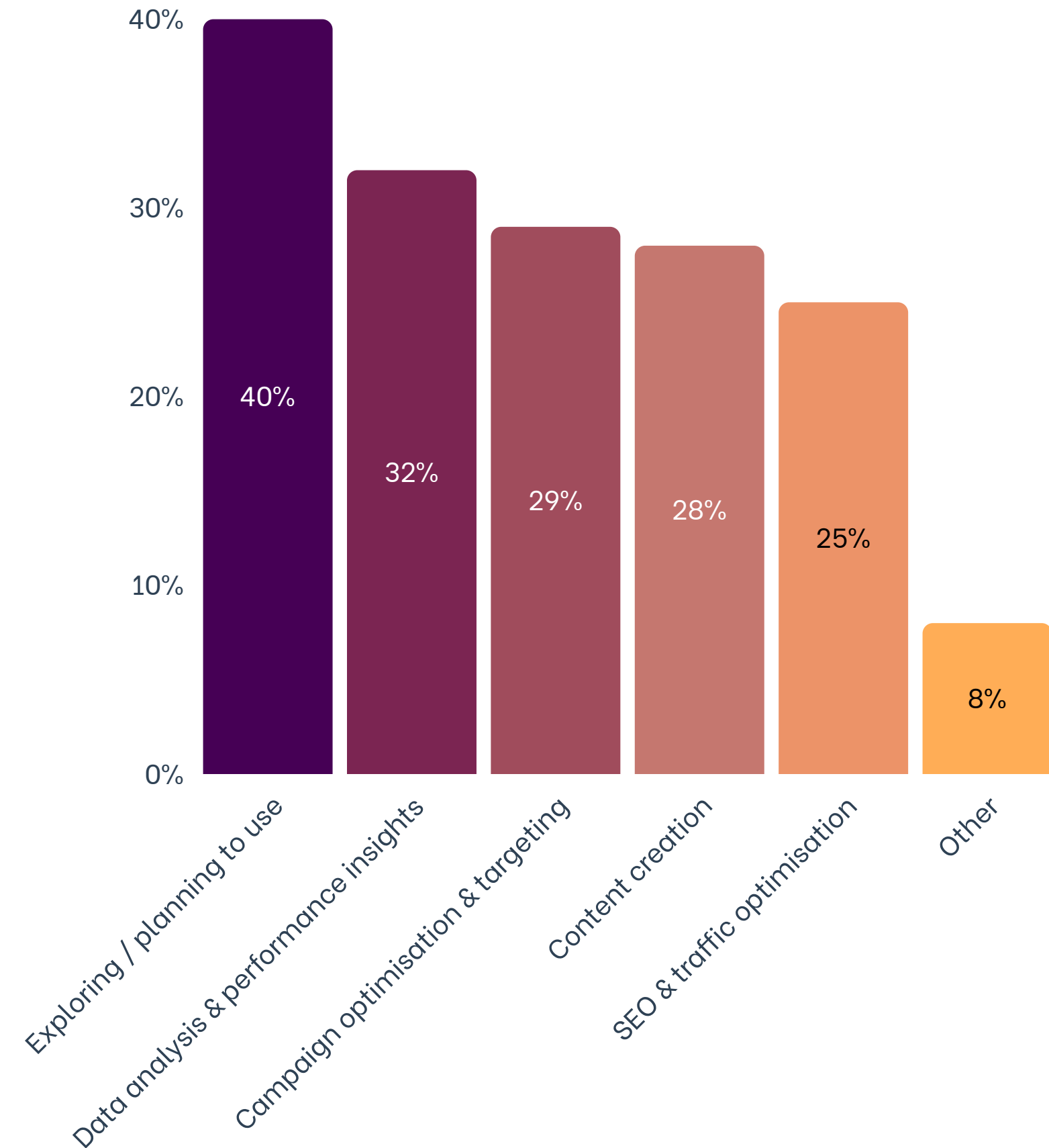
A total of 86 publisher respondents answered this question, together providing over 200 individual selections, as respondents could tick multiple options to reflect all relevant use cases.

The most common response, chosen by 40%, was “exploring AI tools but haven’t made an investment yet,” showing broad curiosity but limited committed spend.

Beyond exploration, the leading areas of activity are data analysis and performance insights (32%), campaign optimisation and targeting (29%), content creation (28%), and SEO and traffic optimisation (25%).

A small number (8%) selected other options such as operational efficiency tools or reported no current AI use.

In summary, publishers show high awareness and growing experimentation, with most still in the discovery and evaluation phase but clear signs of momentum across performance, optimisation, and content-led applications.



Taken from 200 responses across from 86 publisher surveys.

Voice of the publisher

“We’re using AI to automate manual processes, for example, reviewing and filtering offers and vouchers. Manual checks currently take too much time; AI will help streamline this and free up staff to focus elsewhere. There’s a lot of hype around AI and fraud, but it’s important to separate genuine innovation from sales noise.”

“AI tools are now embedded across our commercial teams, from prospect identification and customer qualification to outbound insights and development. We’ve also launched an internal AI learning programme and use machine learning for large-scale data analysis and bid optimisation. We’re even developing a cross-network blacklist to tackle fraudulent or non-compliant publishers.”

“Our in-house product integrates generative AI in three areas, combining ChatGPT and internal data to improve campaign performance. AI-driven data pooling and tighter sub-network regulation are helping us raise industry standards and reduce low-quality participation.”

Voice of the agency

“We’re planning to use AI for partner recruitment, compliance, and performance reporting. With more budget, we could unlock the full potential of affiliates, from paid placements and media buys to exposure and conversion optimisation.”

“AI is central to content and asset creation for our publishers, from onboarding materials to campaign messaging. It also plays a role in reframing compliance: helping us move the conversation from fear and fraud to opportunity and credibility.”

“We actively explore AI-driven tools for fraud prevention, recruitment, and compliance, and we share these solutions with our advertisers. The priority now is education, helping brands understand AI’s potential while ensuring networks take greater responsibility for quality control.”

Voice of the brand

“As a cybersecurity company, every AI initiative undergoes rigorous review. We’re developing our own AI for marketing applications, and those learnings will inform how we extend AI use across the business. For us, the goal is smarter, more controlled affiliate activity that avoids channel overlap.”

“We see AI as a resource amplifier, particularly for creative and email messaging, where internal capacity is limited. Our next step is using AI to help measure and demonstrate the affiliate channel’s incremental value.”

“We already use AI for brand monitoring and fraud detection and are now testing tools to create affiliate-specific creatives. With the right investment, AI can help affiliates move from demand capture to true demand creation.”

OpenAI's recent announcement of its partnership with Stripe in the US to enable direct transactions inside ChatGPT has major implications for how consumers shop online and the affiliate marketing channel.

The development means that users will increasingly be able to move from researching a product within an AI interface to checking out without ever leaving the platform.

This marks the emergence of what OpenAI is calling "agentic commerce." It creates a new path to purchase where AI not only aggregates content and provides recommendations, but also completes the transaction itself.

For affiliate and partner marketing, the relevance is obvious. Much of the information AI systems rely on, from reviews and comparisons to deal-finding and influencer advice, is produced by affiliates. The key question is whether this content continues to be recognised, attributed, and rewarded in an AI-driven shopping environment.

The APMA asked its members what they thought...



Quotes from APMA members...

Santi Peirini, CEO, CJ

“As AI tools like ChatGPT move from recommendations into direct checkout through partnerships like Stripe, the affiliate’s role is expanding from tracking transactions to powering the trust layer of AI commerce.”



Rebecca McNiven, Silverbean

“The biggest risk for the affiliate channel is that of zero-click searches overriding the last-click commission model ... This content has to come from somewhere – the big question is how partners ensure this content is visible, and that they are rewarded for it.”



Matt Gilbert, CEO, Partnerize

“We believe strongly that AI will be the forcing-function to turn affiliate marketing into a \$100 bn TAM.”



Quotes from APMA members...

Ant Clements, MD EMEA, impact.com

“The emergence of agentic commerce isn’t a surprise – it’s been bubbling away ... Consumers are still multi-touch. ChatGPT and other LLMs know they can’t be the final word; that’s why they rely on and reference external sources, which are overwhelmingly human-driven content.”



Giles Hunt, CTO, Optimise

“What will emerge ... is the ‘data cost’ in providing this integration. That is to say, who will provide the data to OpenAI to enable the product comparison and provide a meaningful experience to end users.”



Carla Arrindell, Global Sales & Marketing Director, Optimise

“The launch of Agentic Commerce is no surprise but is a significant change – one that could have real impact for SERPs-based models ... There are still so many unknowns: how quickly brands will move to adopt this new channel ...”



Quotes from APMA members...

Rachel Said, Genie Goals

“This move by OpenAI to tie up with Stripe ... affiliate marketing, in its current form, will be affected. If more consumers check out within ChatGPT ... voucher sites and content publishers may need to work harder to maintain their position.”



James Bentley, Director of AI Strategy, Awin

“The launch of ChatGPT’s commerce functionality with Stripe shows how AI is reshaping shopping journeys ... For affiliate, this could unlock exciting new opportunities: delivering trusted, relevant recommendations to consumers while creating new ways for brands to monetise discovery.”



Edwyn McFarlane, COAM

“Initial thoughts ... nothing has changed from a content creator’s point of view ... OpenAI still takes content, summarises it and crucially doesn’t import the affiliate links that were originally in the content itself.”



Quotes from APMA members...

Ian Sims, Founder, Rightlander

“If this ends up with brands/publishers deciding that voucher codes are more reliable than tracking links ... then they need to create very unique, identifiable voucher codes ... Especially when we talk about campaign-driven links and old culled affiliates.”



Steven Brown, CEO, Moonpull

“Consumers are using AI for product discovery ... Therefore perhaps there’ll continue to be growth in curated partnerships measured by affiliate tracking, so keeping the CPA approach to a large degree.”



Helen Southgate, Chief Strategy Officer, Acceleration Partners

“This is just the first step in AI-driven commerce. Affiliates that double down on unique, trustworthy, relevant content will win — but the industry must rethink attribution and reward models, and fast.”



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Our report is coming soon.

Register to get your copy and
sign up for updates from the
APMA

www.theapma.co.uk

