

● THIS IS HAPPENING NOW.

YOUR AFFILIATE PROGRAM IS ALREADY SHAPING **AI ANSWERS.**

HERE'S WHAT TO DO ABOUT IT.

AP's view on AI-mediated discovery, the publisher relationships driving it, and where to act before your competitors do.

PREPARED BY
ACCELERATION PARTNERS

FOR
CLIENT LEADERSHIP

STATUS
ACT NOW

INSIDE THIS DOCUMENT

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SECTION 01

THE WORLD TODAY

What's changing and why it matters for your brand.

01.1 · SETUP

THREE FORCES RESHAPING BRAND DISCOVERY

The way consumers find and choose brands is shifting at a pace most marketing stacks weren't built to handle.

Three forces are colliding at once: SEO-driven traffic is declining, AI interfaces are compressing the journey from research to decision, and the economics of how publishers get paid for their content are being restructured.

This document sets out AP's view of that shift: what the data shows across the brands we manage, what it means for your program, and how we're helping clients act on it now. We're not asking you to take a position on AI in the abstract. We're showing you what's already happening inside your publisher relationships — and how to make it work harder.

Brands that get ahead of this now will be in a stronger position than those that treat it as a future concern.

KEY TAKEAWAY

This is not a future trend. It is already shaping how your brand shows up in customer decisions today.

AI PLATFORMS ARE CHANGING HOW CONSUMERS DISCOVER BRANDS

AI platforms such as ChatGPT, Perplexity, Gemini, and Claude are compressing the consumer journey. Search and selection, previously two distinct steps, are collapsing into one. A consumer asks a question and gets a recommendation. The research phase and the decision phase now happen in the same interaction.

The consequence is immediate. The click, which has been the primary attribution signal for performance marketing, may not happen at all. Influence now occurs without a traceable referral. Whether a brand appears in an AI-generated recommendation matters commercially, but standard measurement tools don't capture it yet.

KEY TAKEAWAY

Search and selection, previously two distinct steps, are **collapsing into one.**

PUBLISHER ECONOMICS ARE UNDER PRESSURE

The content ecosystem that affiliate programs rely on is under strain. SEO-driven traffic, the primary revenue source for most affiliate publishers, is falling as AI platforms answer questions directly rather than sending users to websites. CNN and Business Insider both reported traffic drops of 30 to 40% following the introduction of Google's AI Overviews.

30–40%

Traffic decline at major publishers following Google AI Overviews

416bn

AI scraping requests blocked by Cloudflare in H2 2025

79%

Top US news sites now blocking AI training bots

500+

Publishers signed to revenue-share models for AI content use

Publishers are responding in two ways: blocking AI platforms from accessing their content, or negotiating licensing deals that pay them when their content is used. Research published in December 2025 found that publishers who chose to block AI crawlers actually saw a 23% decline in total traffic, accelerating the move toward licensing. News Corp, The Guardian, Washington Post, Axios, and The Atlantic have all signed content agreements with major AI platforms.

IMPLICATION

The practical implication for brands: publishers who have licensed their content to AI platforms are now inside the systems that generate recommendations. That changes how you think about which publisher relationships matter most.

A NEW CONTENT INFRASTRUCTURE LAYER IS FORMING

Between the publishers who produce content and the AI platforms that use it, a new infrastructure layer is being built. Its job is to broker access: publishers supply licensed content into structured pipelines, and AI companies pay to ground their responses in that content rather than scraping the open web.

Microsoft launched its Publisher Content Marketplace in February 2026, with Business Insider, Conde Nast, and Hearst among the supply partners.

Publishers set their own terms, meter usage, and receive payment each time their content grounds an AI answer. Amazon is building equivalent infrastructure. This shifts the information economy from open-web scraping to permissioned, metered access, and it's happening now.

The implication for your affiliate program: the publishers in your program who produce authoritative category content are the same publishers who will supply content into these marketplaces. Your existing publisher relationships are more strategically relevant than they may appear.

KEY TAKEAWAY

Over 95% of citations in AI-generated answers come from **third-party content**, not brand-owned pages. The route in is through the publishers writing about your category.

02

SECTION 02

WHAT THE DATA SHOWS

Early findings from AI visibility tracking across brands.

02.1

WHAT AI VISIBILITY DATA ACTUALLY TELLS US

AP brands across several sectors have been tracking their AI visibility using Profound, a platform that monitors how brands appear across AI-generated answers. The data reveals consistent patterns, regardless of category.

AFFILIATE PUBLISHER CONTENT DRIVES THE MAJORITY OF AI CITATIONS

Across brands we've measured, earned media accounts for 20 to 40% of total citation share in AI outputs. Within earned media, the dominant sources are review sites, comparison articles, best-of lists, and category guides. In this context, earned media means the content your affiliate publishers produce — not PR coverage. The affiliate content ecosystem is already the primary driver of AI citation authority, even though no one designed it that way. Which means the majority of what AI systems say about your brand is being written outside your organization.

20–40%

Typical earned media share of total AI citations across brands measured

28%

Share of active affiliate partners appearing in AI outputs for a Travel Brand measured

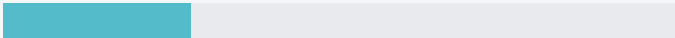

16/25

Top cited publishers already in affiliate program for a Sports Equipment Brand

YOUR EXISTING AFFILIATE PARTNERS ARE ALREADY SHAPING AI ANSWERS

When brands map their active affiliate publisher list against the publishers appearing in AI-generated answers for their category, the overlap is significant. For a travel brand measured, 28% of active affiliate partners appeared in AI citation data within a single measurement week. For a sports equipment brand, 16 of the top 25 most cited publishers in the category were already in the affiliate program.

AFFILIATE & AI CITATION OVERLAP

| | | |
|-------------------------|--|----------------|
| Travel brand |  | 28% |
| Sports equipment |  | 16 / 25 |

Where a brand has strong publisher relationships, those publishers are already influencing AI recommendations. Where the relationships are thin, the gap is visible in the citation data.

THE REFRAME

This is not a visibility problem. It is a coverage problem — and one that can be actively managed.

THERE ARE SPECIFIC TOPIC AREAS WHERE BRANDS ARE INVISIBLE IN AI ANSWERS

The citation data consistently reveals large blind spots. A retail brand we measured had a 97.6% visibility score for queries about retail and convenience services, but near-zero presence for vitamins (0.7%), oral care (1.9%), and pain relief (0%). These aren't categories where the brand lacks products. They're categories where the right affiliate publisher content simply doesn't mention or link to them.

For a toys brand, sentiment analysis in AI outputs showed price as the consistently dominant negative narrative, framing that comes from editorial content across affiliate and earned media sites. Understanding this gives you something specific to work on, whether through publisher briefing, content updates, or targeted investment.

RETAIL BRAND · VISIBILITY BY TOPIC

| | | |
|---------------------------------|--|--------------|
| Retail & convenience |  | 97.6% |
| Oral care |  | 1.9% |
| Vitamins |  | 0.7% |
| Pain relief |  | 0% |

NEW OPPORTUNITIES APPEAR IN CITATION DATA BEFORE THEY APPEAR IN PROGRAM DATA

In several cases, publishers have appeared in the top cited pages for a brand's category without being active in the affiliate program. These aren't necessarily large publishers, but they are shaping AI answers. The citation data functions as a real-time signal for where new publisher relationships would have the most impact.

KEY TAKEAWAY

The affiliate content ecosystem is already shaping how AI answers questions about your category. **The question is whether that's happening by design or by accident.**

03

SECTION 03

THE OPPORTUNITY FOR YOUR BRAND

What this means in practice.

03.1

THE CONTENT YOUR PUBLISHERS PRODUCE IS ALREADY DOING THE WORK

When a consumer asks an AI interface which toy to buy, which streaming service to subscribe to, or where to fill a prescription, the answer is shaped by published content.

Specifically, by the kind of evergreen, structured, authority-driven content that affiliate publishers have been producing for years.

The opportunity isn't to build something new from scratch. It's to understand that your existing publisher ecosystem already has influence over AI outputs — and to make that intentional. That's where AP's role goes beyond program management. We map what's happening in your citation data, identify which publisher relationships are driving AI visibility, and tell you what to do with that information. We treat it as part of the same growth engine, not a separate workstream.

KEY TAKEAWAY

This isn't a new channel to manage. **It's a system to understand, influence, and align incentives around.**

THREE SHIFTS TO ACT ON NOW

01 SEE THE SYSTEM

Understand where your brand appears — and doesn't — in AI-generated answers.

- Map your active affiliate publishers against citation data to identify coverage gaps
 - Identify specific topic areas where your brand is underrepresented
 - Spot new publishers appearing in citation data who aren't yet in your program
-

02 SHAPE THE SYSTEM

Actively influence the publishers and narratives driving those answers.

- Brief publishers on content gaps and brand positioning
 - Use citation data to identify dominant narratives (e.g. pricing, quality, value)
 - Address negative or missing narratives through targeted content updates
-

03 REWIRE INCENTIVES

Start rewarding influence, not just clicks.

- Recognize publishers contributing to visibility and recommendation — not just conversion
 - Build the case for hybrid compensation models where influence is present but clicks aren't
 - Test and scale models that align publisher incentives to AI visibility
-

WHY ACTING NOW MATTERS

Citation authority in AI platforms is not something that appears overnight. It reflects accumulated content authority, built through publisher relationships and content quality over months and years. Brands that start building and measuring it now will be ahead of those that wait for the measurement infrastructure to be fully mature before acting.

The publisher relationships you build for citation purposes are the same relationships you manage for affiliate performance. This isn't a separate budget or a separate program. It's the same work, directed at a wider set of outcomes. For brands with significant category blind spots — like the retail brand we measured with near-zero AI presence across three product categories — the revenue implication of not appearing in AI recommendations is already real, even if it's not yet fully attributable. Waiting for perfect measurement before acting is itself a decision with a cost.

KEY TAKEAWAY

In a compressed decision journey, not being present is the same as not being considered.

The brands that will be best positioned as AI-mediated discovery matures are those building publisher relationships and citation authority now, not those waiting for perfect measurement before they start.



SECTION 04

THE MEASUREMENT PICTURE

What we know, what we can't yet prove, and where that's heading.

04.1

AN HONEST ASSESSMENT

There's an important distinction to make clearly.

We can see where brands appear in AI outputs. We can track which publishers are driving those appearances. We can measure how sentiment is shifting week on week, and we can identify specific topic areas where a brand is absent. What we can't do yet is draw a direct, auditable line from a citation in an AI response to a transaction at checkout. That link doesn't exist today.

THE REFRAME

This isn't a measurement failure — it's a signal that the decision is happening earlier than your current model can see.

Brands that understand this from the start are in a stronger position than those that discover it later. The visibility data is genuinely useful for program decisions now. It just isn't a revenue attribution tool. Not yet.

WHAT IS AND ISN'T MEASURABLE TODAY

What we can measure

- **Visibility score:** how often your brand appears in AI-generated answers

- **Citation share:** your share of citations in the category, and how it's trending

- **Publisher-level citation data:** which specific sites and articles are shaping AI responses about you

- **Sentiment scoring:** the dominant positive and negative narratives about your brand in AI outputs

- **Topic-level visibility gaps:** where you appear and where you're absent

- **Week-on-week trends:** whether visibility, citation share and sentiment are moving in the right direction

What we can't measure yet

- The direct link between a citation and a transaction

- Whether a specific AI response influenced a purchase decision

- How many users saw a recommendation and then converted

The first column is useful intelligence that changes how you approach publisher strategy and content investment. It just isn't the same as revenue attribution.

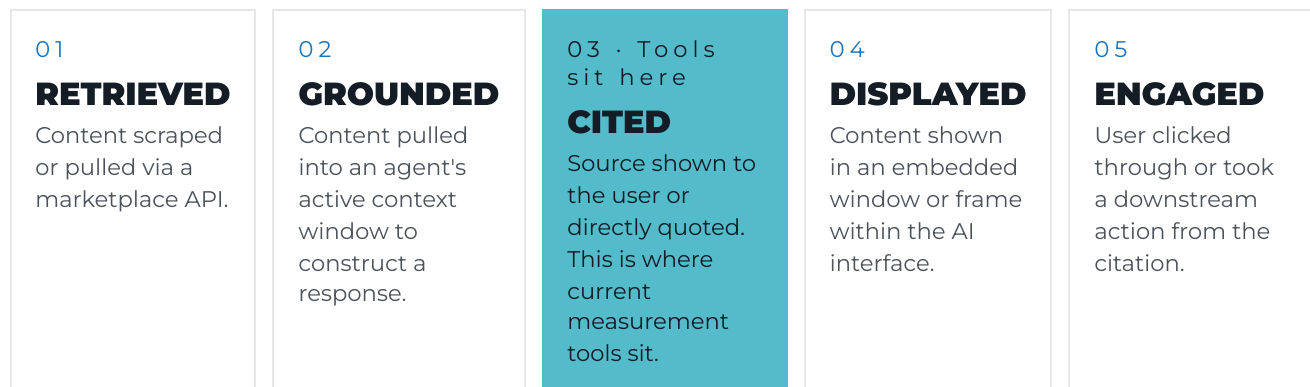
04.2 · INDUSTRY STANDARD

OPEN ATTRIBUTION: THE INDUSTRY'S ATTEMPT TO FIX THIS

OpenAttribution is an industry-led initiative working to establish a common standard for tracking how content is used by AI systems.

Rather than each AI platform self-reporting content usage, the aim is neutral third-party telemetry that both content owners and AI platforms can verify. The standard maps five measurable events in the content usage chain.

THE FIVE-STEP CONTENT USAGE CHAIN



Current visibility tracking tools, including Profound, measure at the Cited level, which is step three of five. The full chain, from content retrieval through to user engagement, isn't yet measurable. If OpenAttribution is adopted at scale, it would allow brands and publishers to see how content is being used across the whole chain, and to negotiate compensation accordingly.

FROM MEASUREMENT TO ACTION

THE MEASUREMENT GAP IS REAL, BUT IT'S CLOSING.

The brands building citation authority and publisher relationships now will have a head start when the full attribution chain becomes measurable. Which is why what comes next isn't a wait-and-see — it's a phased path you can begin without reallocating budget.

NEXT SECTION 05 • WHERE TO ACT NOW



05

SECTION 05

WHERE TO ACT NOW

A phased approach to building AI visibility through your affiliate program.

05.1

START WITH WHAT YOU CAN SEE, BUILD FROM THERE

The approach below is designed to be commercially disciplined.

It doesn't require reallocating budget away from performance measurement. It builds an evidence base before asking for structural investment decisions.

PHASE 01
START NOW

DIAGNOSTIC

- Set up AI visibility tracking with a prompt set that reflects consumer queries in your category
- Establish a baseline: visibility score, citation share, and sentiment by topic
- Map your active affiliate publishers against cited publishers to find overlap and gaps
- Identify the specific topic areas where your brand has weak or no AI presence

PHASE 02
ONE REPORTING CYCLE

TEST

- Test whether higher citation share in a topic area corresponds to stronger demand signals
- Check whether the publishers appearing most in citation data over-index in affiliate revenue
- Brief one or two high-citation publishers on content gaps and measure whether citation share moves
- Recruit one new publisher identified through citation data and track impact over 4–8 weeks

PHASE 03
WHERE PHASE 02 SHOWS
SIGNAL

INVEST & SCALE

- Structured content investment or fixed fees for publishers with strong citation presence
- Systematic briefing of existing publishers on topic gaps and brand sentiment narratives
- Ongoing recruitment program targeting publishers identified through citation data
- Scale only where measurable lift is evidenced — treat this as any other test-and-learn investment

HOW TO THINK ABOUT VISIBILITY DATA ALONGSIDE PERFORMANCE DATA

Visibility metrics don't replace revenue metrics. They sit upstream of them. Use this framework to keep both in view.

| | |
|----------------------------|---|
| Primary metrics | Revenue and incrementality. These don't change. |
| Leading indicator | Visibility score and citation share, tracked week on week. Upstream signals that may predict downstream performance. |
| Strategic signal | Topic gap coverage and publisher citation overlap. Drives publisher recruitment and briefing priorities. |
| Brand health signal | Sentiment score and dominant narrative themes. Informs publisher briefing and content strategy. |
| Recruitment signal | New publishers appearing in citation data who aren't in your program yet. |

FOUR PRINCIPLES TO KEEP THIS COMMERCIALY GROUNDED

01 DON'T REALLOCATE BUDGET ON CITATION DATA ALONE

Revenue and incrementality remain the primary test.

02 DON'T IGNORE WHAT THE VISIBILITY DATA IS TELLING YOU

The consumer journey is compressing, and citation authority is an upstream signal that will matter more over time.

03 TEST BEFORE YOU SCALE

Run contained experiments and build an evidence base before making structural investment decisions.

04 SCALE ONLY WHERE YOU CAN SHOW IMPACT

The goal is to be able to defend every decision with data.

WHAT THIS LOOKS LIKE IN PRACTICE WITH AP

We run the diagnostic, identify the gaps, and bring back a clear picture of where your program stands in AI citation data. We brief your existing publishers on content gaps and sentiment narratives. We identify new recruitment targets from citation data before they show up in performance reports. And we track whether the investments you make move the metrics that matter.

This is what precision looks like in a channel that's getting more complex, not less. If you want to understand where your program stands in AI-generated answers today, we can show you. **Talk to your AP team.**

IN SUMMARY

MAKE THIS INTENTIONAL.

Four things to take away from this document.

-
- 01 The affiliate content ecosystem was built to drive performance.

 - 02 **It is now shaping how AI systems make recommendations.**

 - 03 Your program is already influencing how your brand is represented.

 - 04 **The question is whether that influence is intentional.**

AP's role is to make that influence **visible, measurable, and actionable** — so performance and AI visibility work as one system, not two.

FURTHER THINKING · CLIENT ACCESS

WHERE THIS IS HEADING.

The next two years of AI-mediated discovery, and what it means for your program strategy.

This chapter covers multiple scenarios for how AI-mediated discovery develops, how to calibrate your program for where your category sits today, and what to build now so you're positioned for where it's heading, including:

A AGENT AS RESEARCH TOOL

B AGENT AS RECOMMENDATION ENGINE

C AGENT AS DECISION-MAKER

BOOK A 30-MINUTE DIAGNOSTIC →

Contact our Chief Strategist, Jon Claydon
jclaydon@accelerationpartners.com

One conversation. We'll cover where your category is heading and what your program needs to do about it.

06 / FURTHER THINKING

WHERE THE AGENT JOURNEY GOES


SCENARIO A

[Redacted content for Scenario A]

SCENARIO B

[Redacted content for Scenario B]

SCENARIO C

 This section is available through AP.

ACCELERATION PARTNERS

MAKE AFFILIATE AND AI VISIBILITY WORK AS **ONE SYSTEM,** NOT TWO.

Book a 30-minute diagnostic.

Contact Chief Strategist Jon Claydon:
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