

Global State of

# Affiliate

# Marketing

Insights from

Brands, creators, and publishers on  
deploying AI, scaling partnerships,  
and optimizing investment

2025

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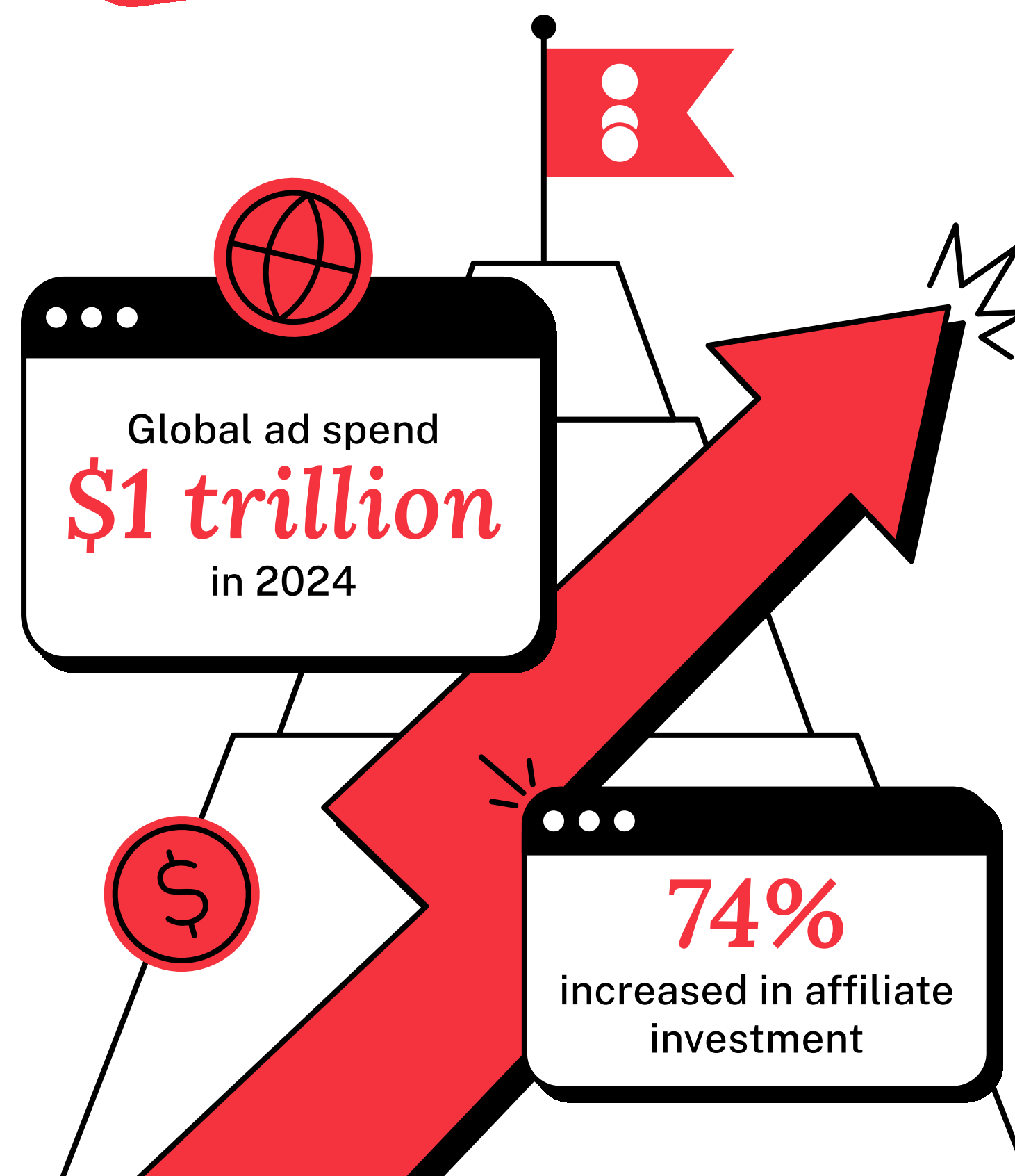
**Affiliate marketing has matured from transactional relationships to strategic partnership programs.**

With global ad spend hitting \$1 trillion in 2024, traditional advertising channels have become increasingly saturated and competitive. The brands that are thriving have recognized this shift and now invest in partnership marketing, with its proven cost effectiveness and measurable performance.

**The opportunity is clear.** A reported 74% of brands increased their affiliate investment specifically due to rising costs in other marketing channels. The results justify the investment: 71% find affiliate marketing more cost effective than other marketing channels, and 66% report stronger ROAS.

**Visionary brands are pulling ahead by rethinking their entire approach to partnerships.** Instead of basic affiliate setups, they're building sophisticated ecosystems that deliver across the entire funnel. They're diversifying their partner portfolios (using 3-4 different partner types), strategically investing resources (38% dedicate 21-30% of marketing spend), and achieving dual outcomes — both performance and brand building.

## Executive Summary



**The sophistication opportunities are significant.**

Social media influencers show an expected +14 percentage point (pp) net brand collaboration growth within the next year, yet many brands still treat them as transactions instead of revenue-driving relationships. While 97% of brands use AI in their affiliate strategy, most deploy only 2-3 use cases when the technology offers much broader optimization potential.

**This report provides a framework for assessing where you are and mapping where you want to be.**

The five pillars of partnership sophistication show how visionary brands are achieving measurable results: diversified portfolios, elevated creator partnerships, strategic investment, intelligent AI deployment, and evolved measurement approaches.

**Use this data to inform your future strategy.** Whether you're looking to justify increased investment, optimize your current partner mix, or build relationships that drive both brand awareness and sales, the insights from 818 marketers across 8 countries provide benchmarks for self-assessment and a roadmap for growth.

This analysis draws from survey results from:

**818**  
*marketers*

Who manage, contribute to, or oversee their company's affiliate marketing programs.

The survey was conducted in mid-2025 in

**8**  
*countries*

The United States, Canada, Australia, Singapore, the United Kingdom, France, Germany, and Italy.

Respondents manage affiliate programs with

*Fewer than*  
**25-500+**  
*active partners*

Across companies from startups to large enterprises.

The survey also targeted key stakeholders to capture their nuanced perspectives on the affiliate ecosystem, including:

**284**  
*publishers*

Who manage, work on, or have visibility into their company's affiliate marketing programs.

[Refer to [Appendix A](#) for the survey's definition of publishers]

**421**  
*content creators*

Who actively post content, earn income through these platforms, and engage in brand collaborations.

See full methodology



03

*How to use this report:*

# Your partnership sophistication assessment

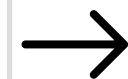
## How to use this report: Your partnership sophistication assessment

**This report is designed as an intelligent planning tool, not just market research.**  
Every insight includes benchmarks to help you assess your current program and identify opportunities for growth.



### Start with self-assessment.

As you read each section, ask yourself: "Where does our program stand compared to these benchmarks?" The data from 818 marketers provides clear reference points for evaluating your current approach against what's working in the market.



### Identify your next-level opportunities.

The five pillars framework reveals where successful brands are investing their time and resources. Use these insights to pinpoint which areas offer the highest impact for your specific situation and organizational stage — whether that's launching your first creator partnerships, diversifying your partner mix, or implementing AI optimization.



### Build your action plan.

Each pillar includes specific next steps you can implement immediately, regardless of team size or budget. Look for the approaches that fit your current resources while building toward more sophisticated strategies.



### Use the data to make your case.

Whether you're seeking leadership buy-in, budget approval, or team expansion, the benchmarks and business results in this report provide the evidence you need to justify partnership marketing investments.

**All of this has one simple goal in mind:**

Help you evolve your partnership approach to deliver measurable business results, whether you're just getting started or looking to optimize an existing program.

04

# The competitive advantage behind partnership sophistication



**This *focus on performance* is reflected in their top priorities for the coming year.**

Rising marketing costs are forcing brands to approach growth through a different lens.

The brands that are thriving have recognized this shift and are investing in partnership marketing, where performance is measurable and cost-effectiveness is proven.

Brands achieving these goals are building comprehensive partnership ecosystems that complement their existing marketing mix and engage customers across the entire journey, from discovery to retention.

#### Top 5 affiliate program goals

**45%** Increase sales

**37%** More cost-effective marketing

**36%** Targeted audience reach

**35%** Increase customer loyalty

**34%** Increase brand awareness

Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).

Question: What are your top 3 goals for your affiliate program in the next year?





05 •

# The five pillars of partnership sophistication

1. Diversify your partner mix
2. The results-oriented investment shift
3. Deploy AI for scale
4. Elevated creator partnerships
5. Bridge the measurement gap

Partnership marketing is delivering results, but many programs *aren't reaching their full potential.*

Our analysis reveals five key areas where the highest-performing programs invest their time and resources.

Use these benchmarks to identify your *biggest opportunities for growth.*

Whether you're hitting your current targets and ready for stretch goals, or looking to improve baseline performance, these pillars show where successful brands are focusing their efforts.

Each pillar includes data to help you assess your current situation and specific *next steps to improve results.*

The goal isn't to implement everything at once — it's to identify which areas offer the highest impact for your specific situation and resources.



01

# Diversify your partner mix

High-performing programs don't rely on a single partner type. They build diversified ecosystems that work across the entire customer journey. The data shows brands are moving beyond narrow, conversion-focused strategies to engage customers at every stage, from initial discovery to long-term retention.

*Brands now collaborate with an average of 3-4 different partner types.*

But sophistication lies in meticulous selection, not just numbers.





# The partner mix realignment is happening now

The most popular partner types reveal how brands are thinking about full-funnel engagement:

- **Search and Media Arbitrage (40%)** - for efficient conversion
- **Loyalty and Rewards (38%)** - for building lifecycle value
- **Deals and Coupons (37%)** - for price-incentive-based conversion
- **Social media influencers (36%)** - for discovery and awareness
- **Network partners (36%)** - for program management and scale
- **Content and Reviews (34%)** - for establishing credibility and trust
- **Commerce Solutions (33%)** - for on-site tools and services



But here's where it gets interesting:

Nearly every brand is actively re-evaluating their partner mix. One in five sees developing a more integrated, multi-channel affiliate strategy as a top opportunity for program growth.

Current affiliate partner mix



Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).  
 Question: What partners does your brand currently work with within its affiliate marketing program?  
 Select all that apply.  
 Note: Please see Appendix A for partner type definitions.

The partner mix realignment is happening now

A clear realignment emerges when examining where brands are planning to increase their efforts versus where they're pulling back:

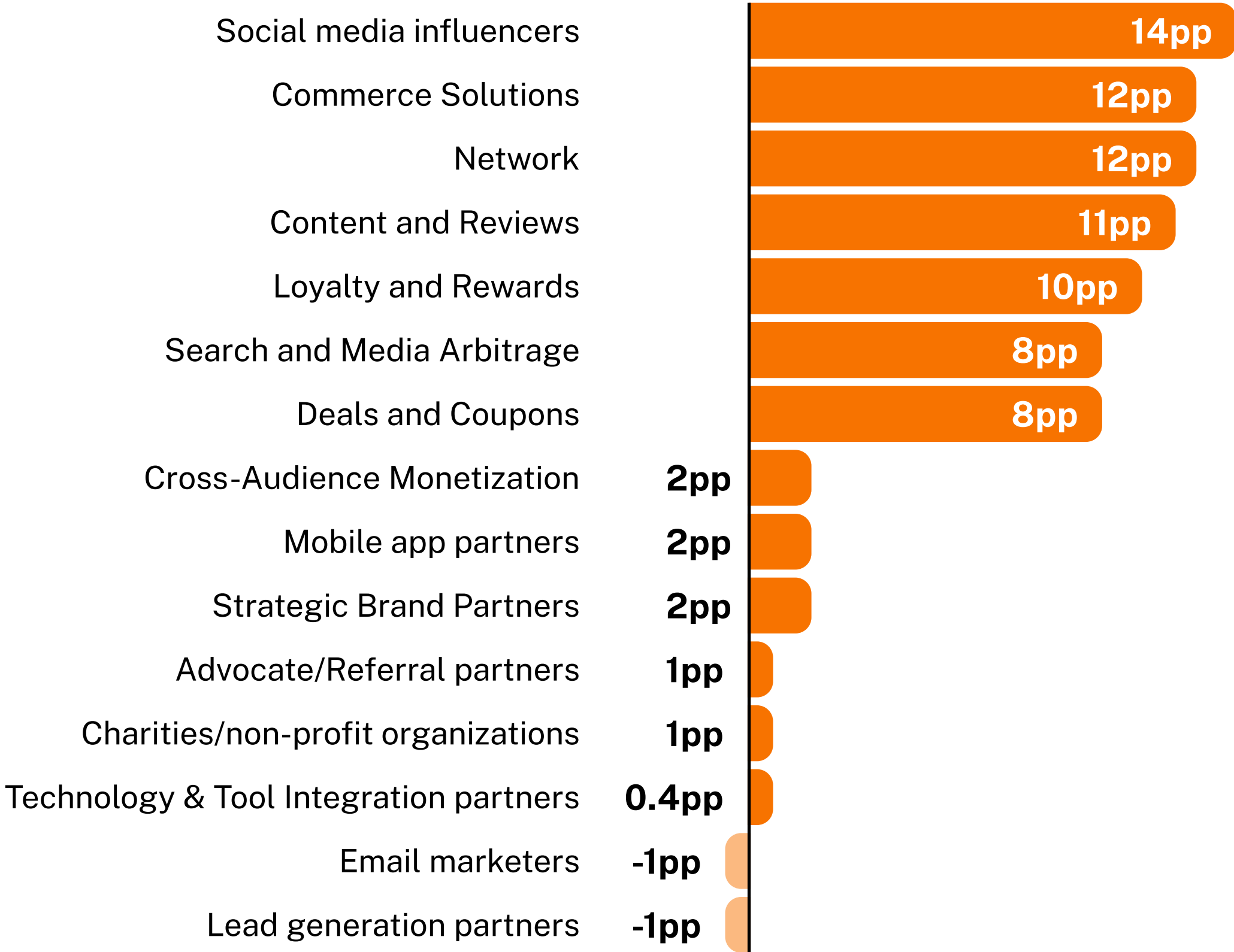
- **Social media influencers show the largest projected growth (+14pp net change)**, followed by Commerce Solutions and Network partners (+12pp) and Content and Reviews (+11pp)
- **Search and Media Arbitrage** remains the most commonly used partner type (40% of brands), but reveals complexity. While 34% plan to increase use, 26% are pulling back, resulting in +8pp net change that signals growth but also re-evaluation and optimization.
- **Loyalty and Rewards** is currently a top partner (28%) and expected to see continued growth ( +10pp net change)
- **Deals and Coupons** are another popular partner type. Positive net change suggests (+8pp), these partners remain important, but with ongoing scrutiny on incremental value
- Brands are pulling back from purely transactional channels like lead generation (-1pp)



Global brands note:

These partnership trends manifest differently around the globe ([see Appendix B](#)), underscoring that a one-size-fits-all global partnership strategy is no longer viable.

Net change in partner type collaborations

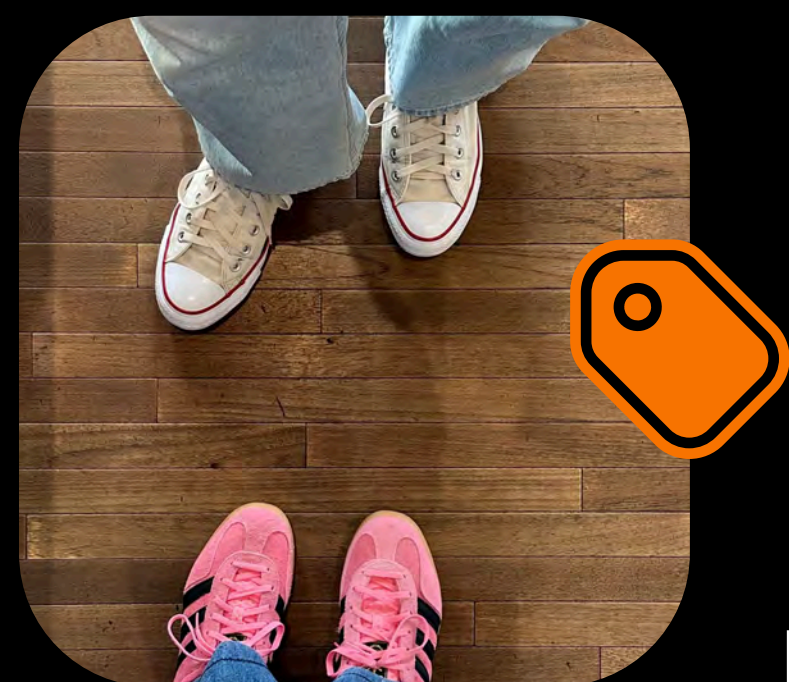


Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).  
Questions: Compared to your current affiliate program, which of the following partner types do you predict your brand will work with more frequently or dedicate more resources to in the future? Compared to your current affiliate program, which of the following partner types do you predict your brand will work with less frequently or dedicate fewer resources to in the future? Select all that apply.  
Note: Values represent the net change in percentage points (pp) for predicted future collaboration, calculated as (% of brands expecting to increase - % of brands expecting to decrease).



# Assess

⚙️ **Map your partner portfolio systematically**



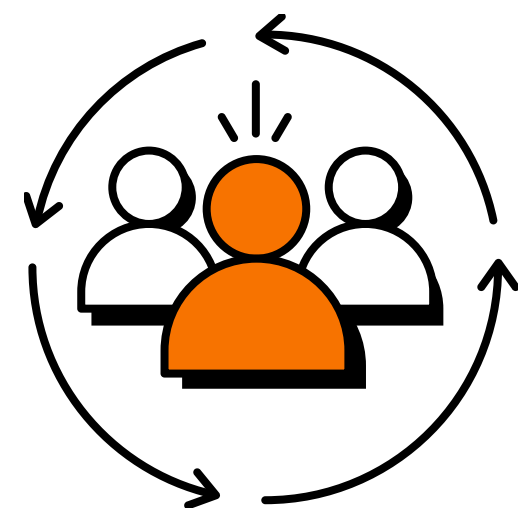
*your  
current mix*



Before you can optimize, you need to understand what you have.  
Start by creating a comprehensive inventory.



## ? Self-assessment questions:



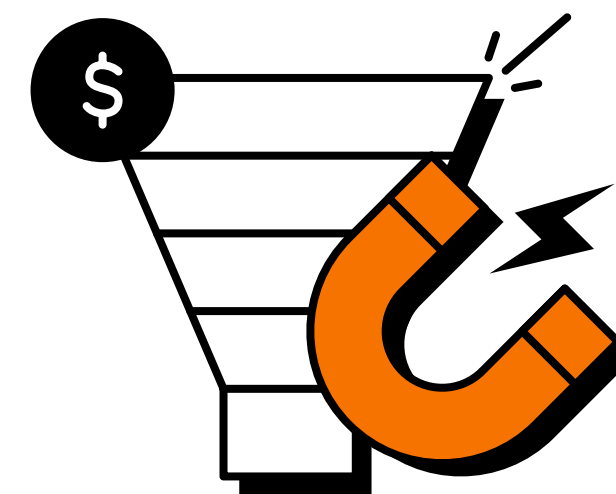
**Which**  
customer journey  
stages are you  
covering?

(Awareness → Consideration →  
Conversion → Retention)



**How**  
does your mix  
compare to the growth  
trends?

Are you invested in the partner  
types showing positive net  
change?



**Are**  
you covering the full  
funnel or just  
conversion?

Performance partners handle  
conversion, but are you missing  
discovery (influencers) and  
trust-building (content/  
reviews)?



**Does**  
your partner mix align  
with your program  
objectives?

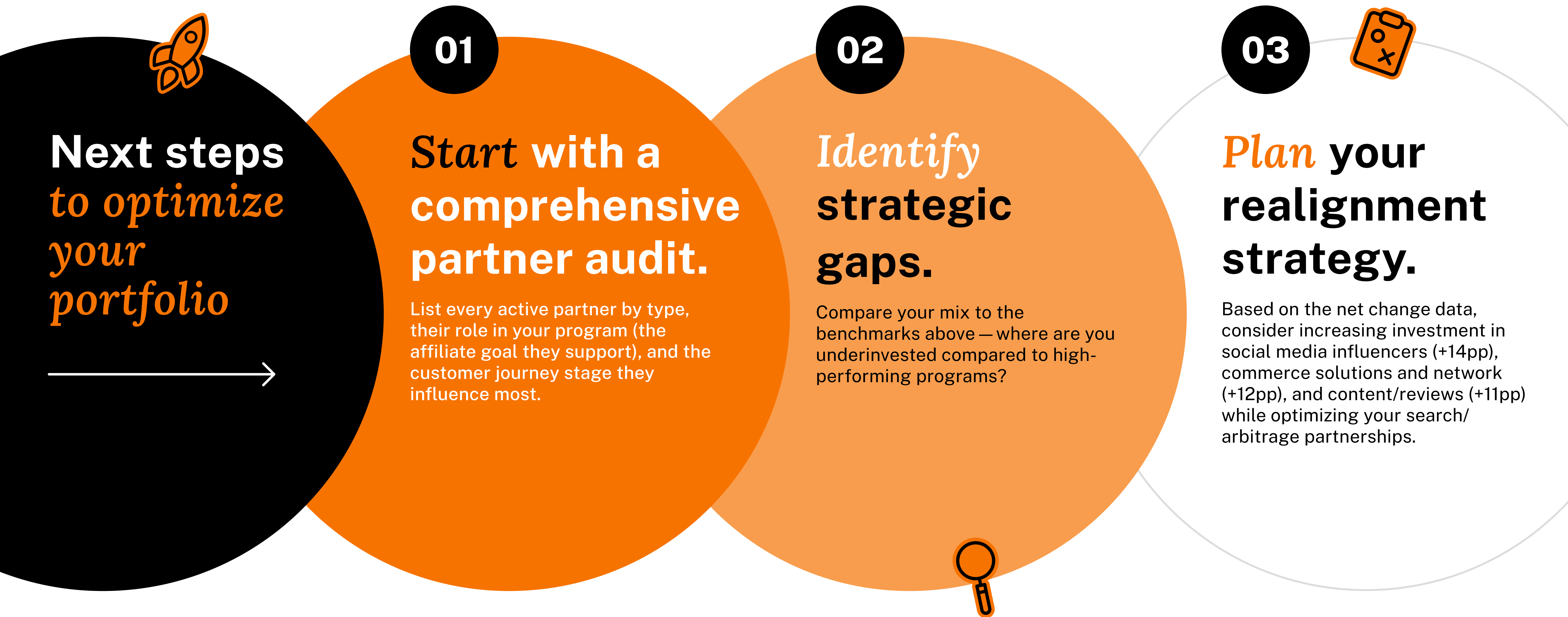
If your top goal is increasing  
sales (45% of brands), do you  
have performance-focused  
partners? If it's cost-effective  
marketing (37%), are you  
leveraging partners with  
proven efficiency?

Match your portfolio to your  
investment priorities.

# Next steps

to

*optimize*  
your  
portfolio



02



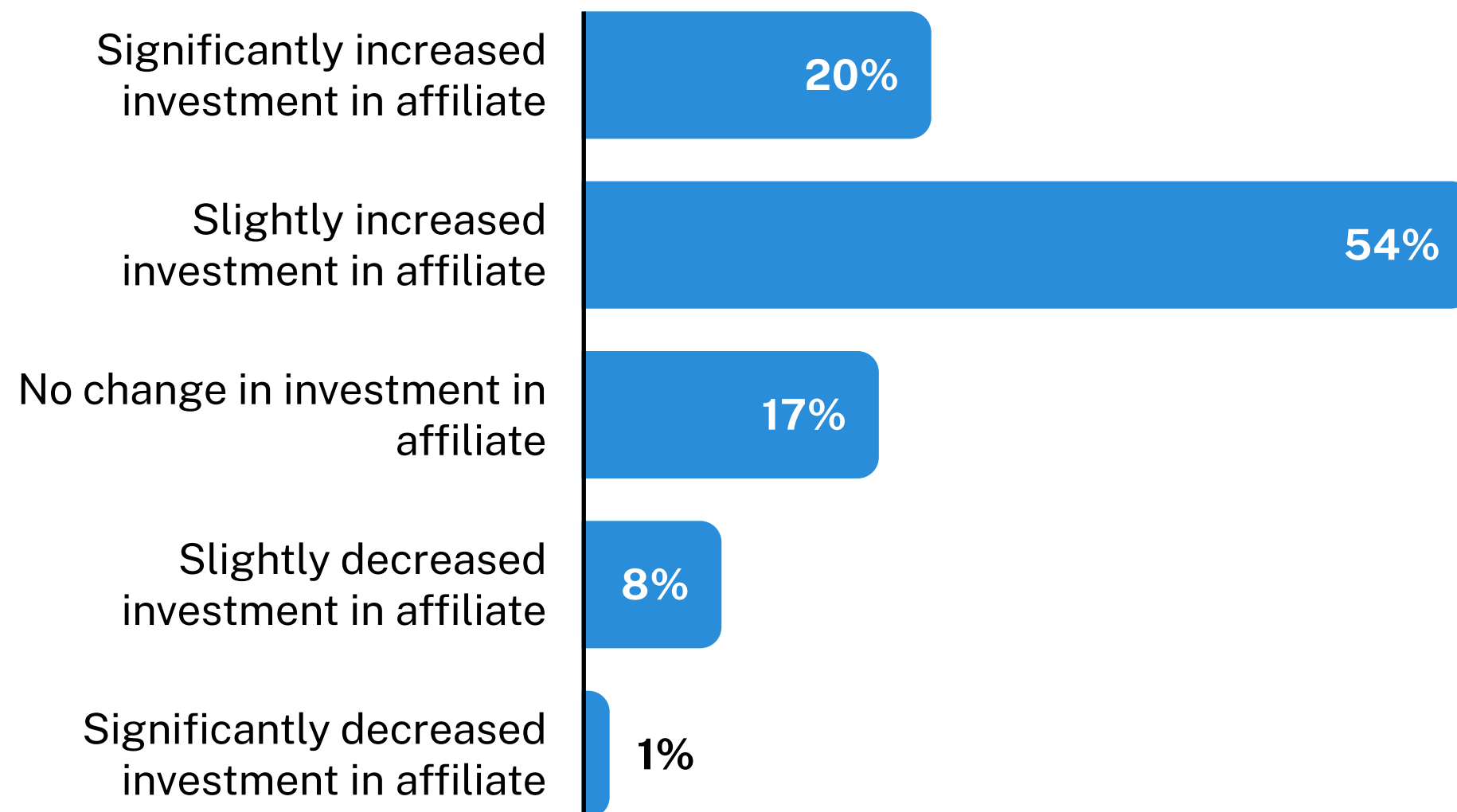
*The results-oriented*

# Investment shift

## The investment momentum is unmistakable.

74% of brands have increased their affiliate investments due to other marketing channels becoming more expensive. For one in five companies, this represents a notable pivot.

### Impact of other marketing channels on affiliate marketing investment



Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).

**Question: How has the increasing cost of other marketing channels changed your company's investment in affiliate marketing?**

Note: 'Unsure' responses excluded.

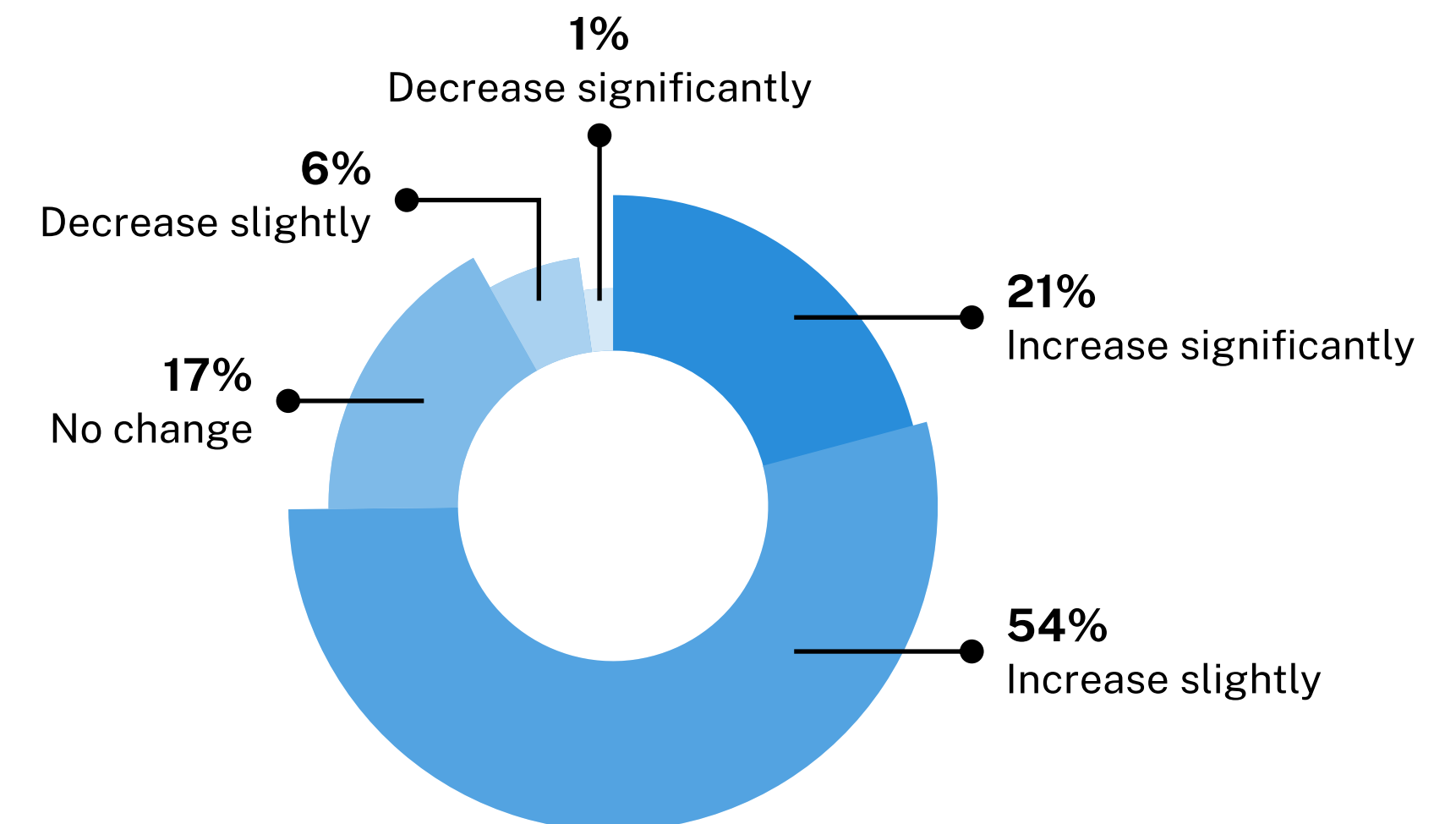
## This isn't a temporary trend — it's a permanent reallocation toward performance.



**Three-quarters of marketers plan to increase their partnership budgets in the coming year.**

This shift highlights a critical perspective change. Marketing now sees partnerships not as a cost center, but as a profit driver.

### Expected change in affiliate marketing budgets



Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).

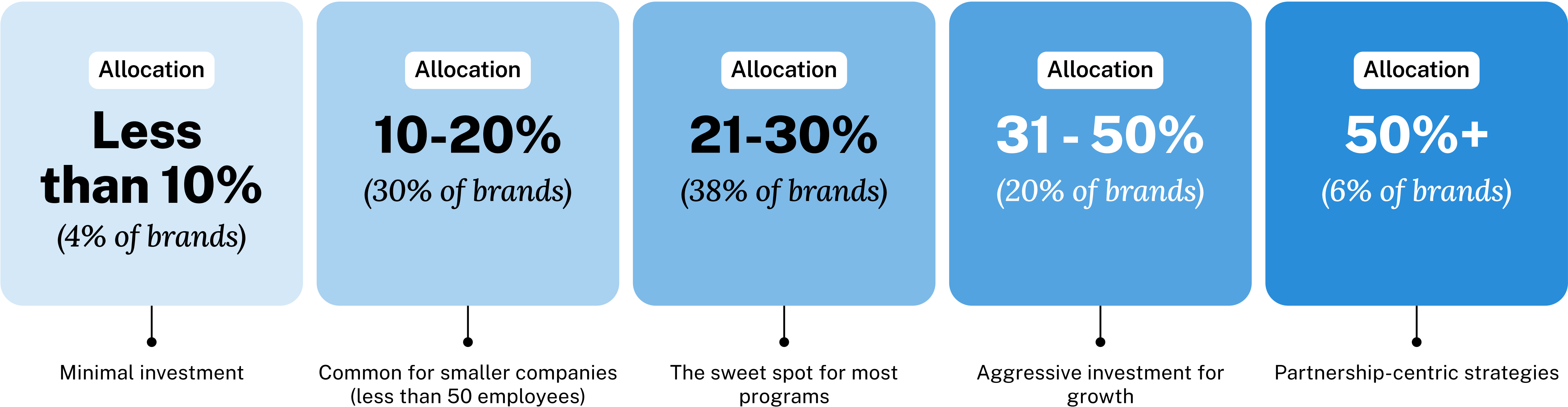
**Question: How do you expect your affiliate marketing budget to change in the next year, considering your brand's overall marketing strategy and performance of your affiliate program.**

Note: 'Unsure' responses excluded.



**The wave of increased spending is set to grow even larger.** One in three brands (34%) now dedicate at least 20% of their total marketing budgets to partnerships, with some allocating up to half their total marketing budget. While other channels demand higher spend for diminishing returns, partnerships deliver consistent growth at scale.

### Breakdown of Affiliate Marketing budget allocations



Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).  
 Question: What percentage of the marketing budget is allocated to affiliate marketing?  
 Note: "Unsure" responses excluded.

**Company size influences allocation strategy:** Larger companies tend to allocate higher percentages of their marketing budgets to affiliate marketing. Those with over 1,000 employees are more likely (12%) to allocate over 50% of their marketing budget to partnerships.



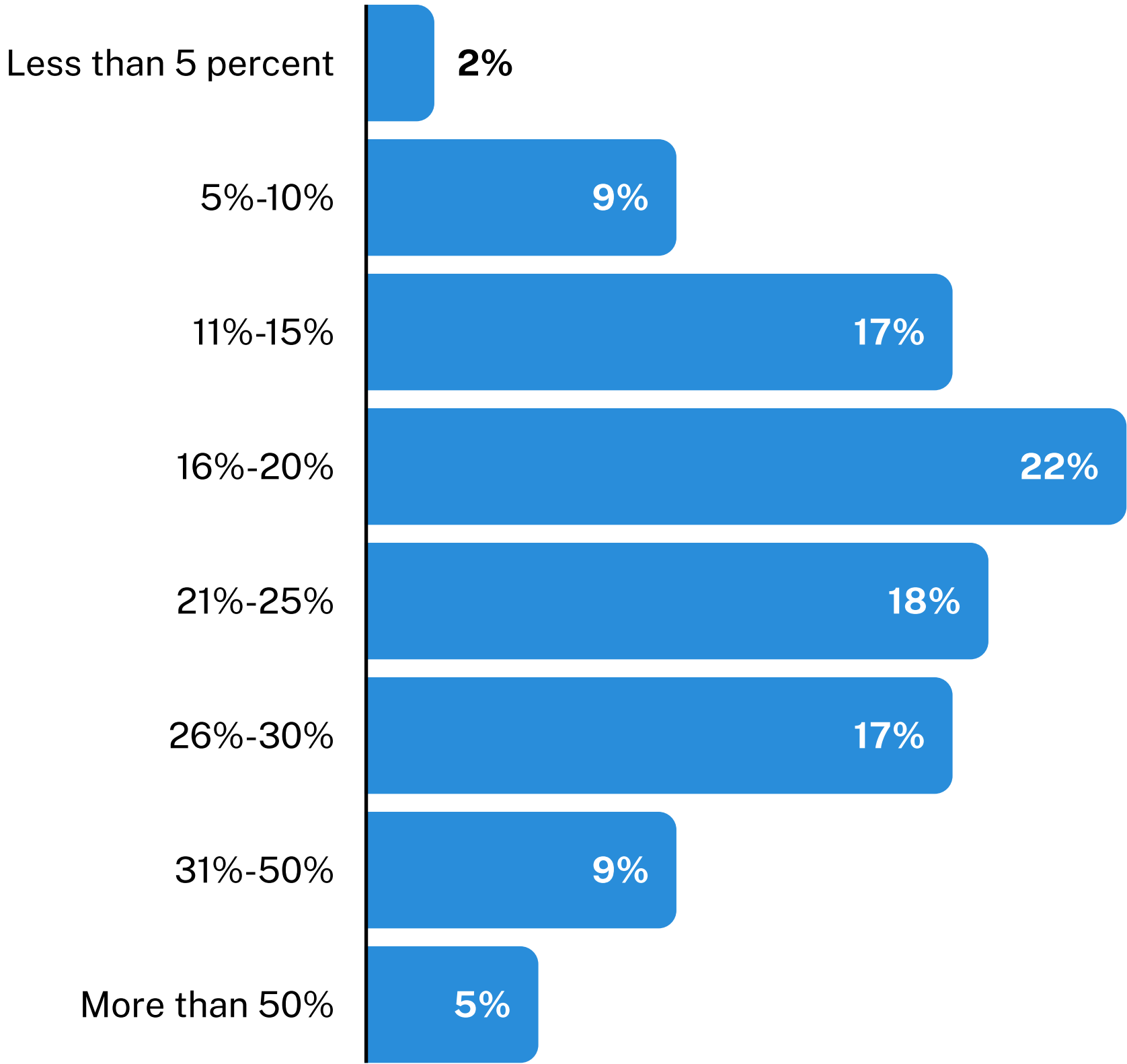
*The results justify the investment:*

**74%** of brands  
generate **11-30%**

of their total revenue from affiliate marketing, with 14% generating more than 30%. Additionally, 73% report increased revenue from affiliate programs over the past year, while only 9% report decreases and 17% no change YoY revenue.

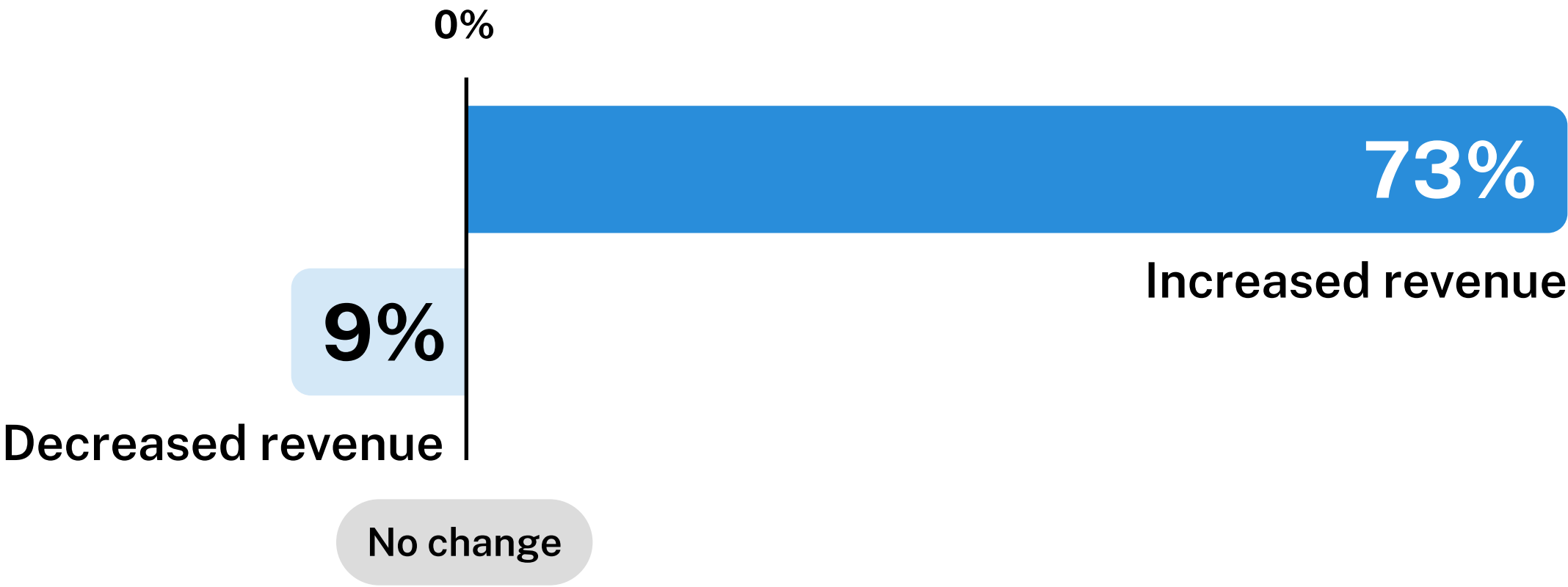


### Revenue generated from affiliate program



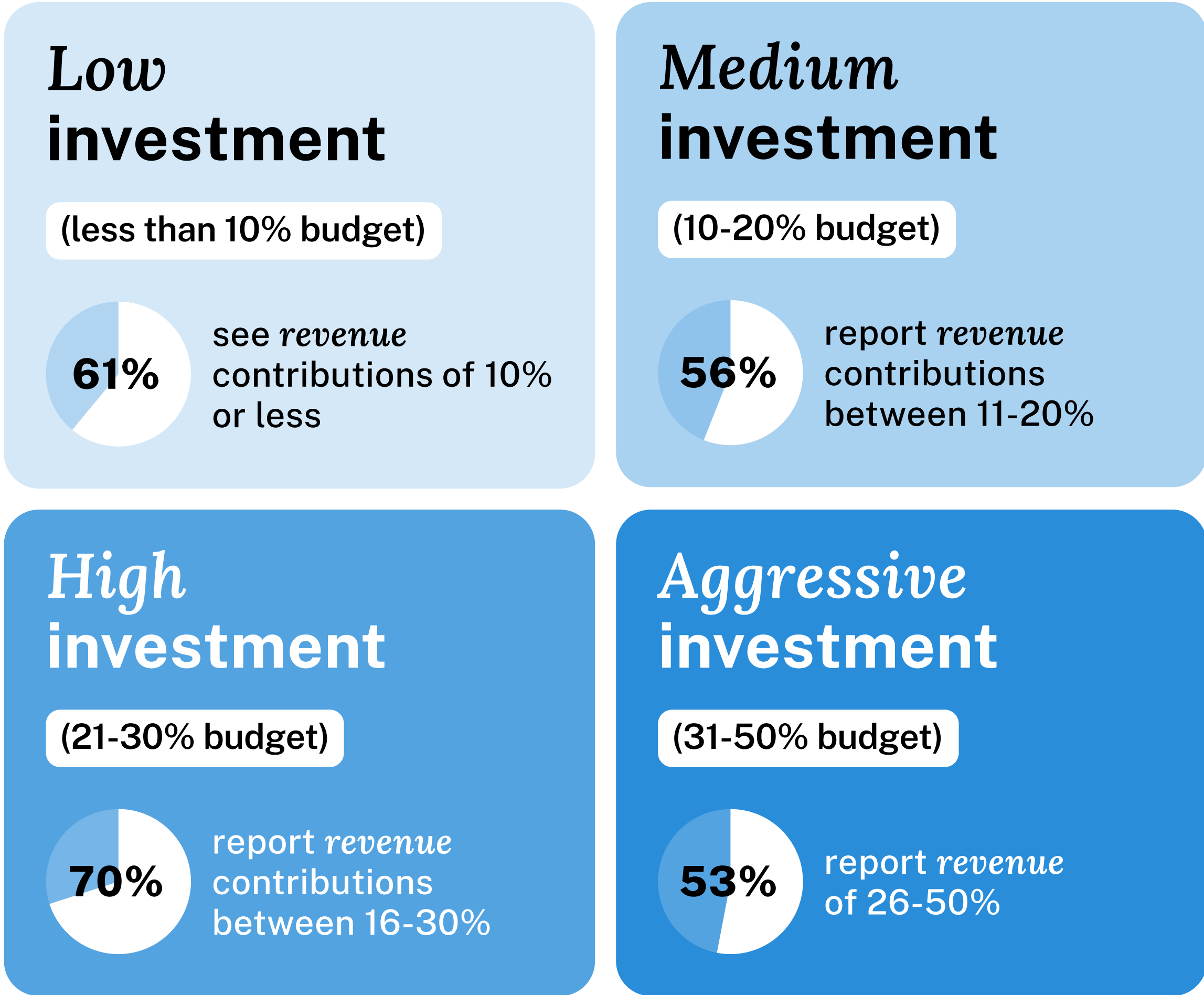
Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).  
**Question: What percentage of your company's revenue is generated from your affiliate program?**  
*Note: 'Unsure' responses excluded.*

### Change in affiliate program revenue (past year)



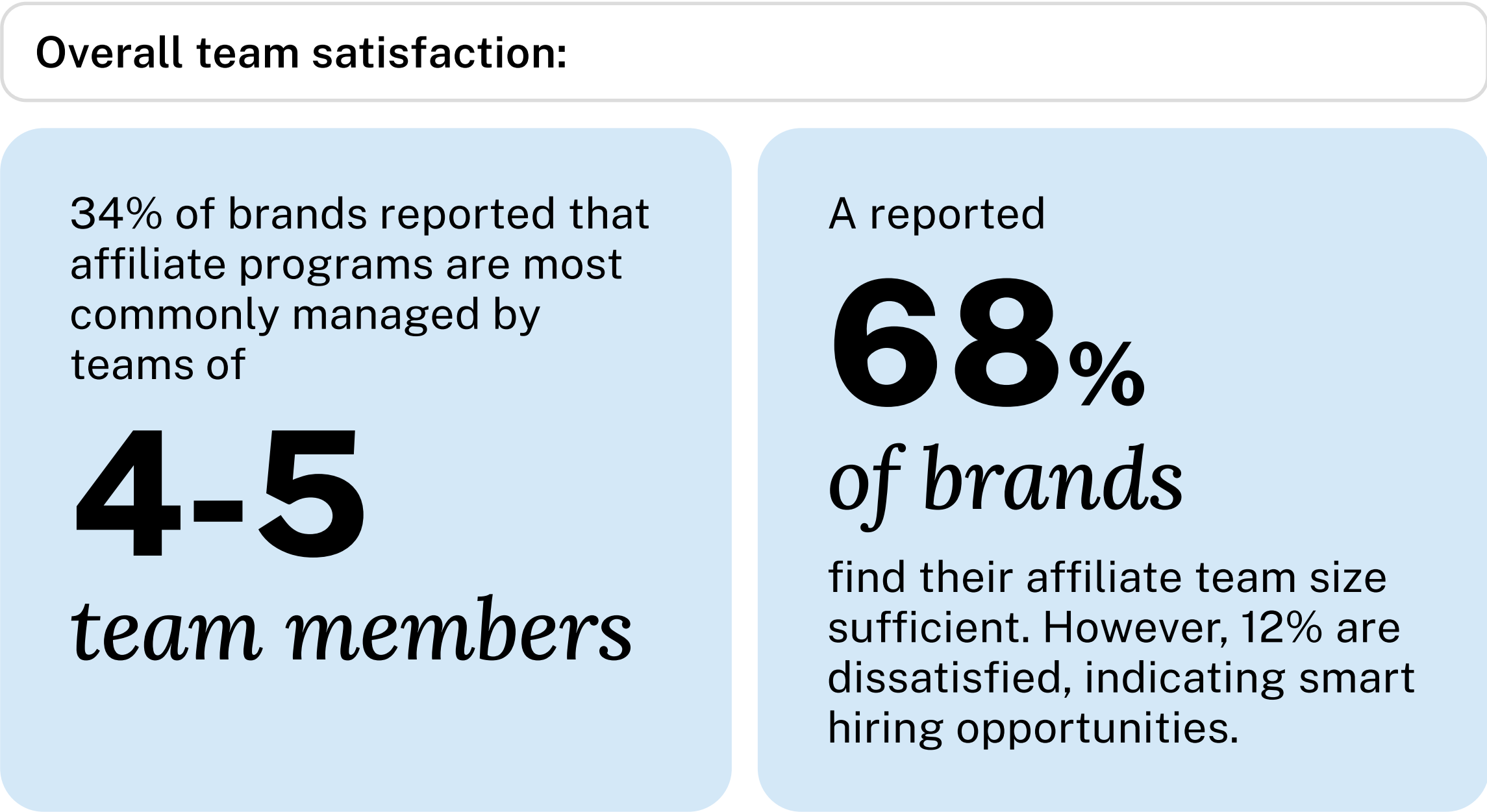
Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).  
**Question: How has your company's revenue from its affiliate program changed in the past year?**  
*Note: 'Increased Revenue' (73%) combines 'Slightly increased' (53%) and 'Significantly increased' (20%). 'Decreased Revenue' (9%) combines 'Slightly decreased' (7%) and 'Significantly decreased' (2%). "Not applicable" responses excluded.*

Our data shows a positive correlation between budget allocations and revenue generated by affiliate programs. While other channels demand higher spend for diminishing returns, partnerships deliver consistent growth at scale.



### Team sizing for scale

Our study found, team size directly impacts partner management effectiveness. Successful affiliate marketing efforts thrive on strong human-to-human relationships, making investment in people the single most critical component of your program's funding.



*Suggested team size benchmarks for*

# Effective partner management:

Team size:

Active partners effectively managed:

**2-3**

*team members*

**Up to 50**

*partners*

**4-5**

*team members*

**Up to 100**

*partners*

**6+**

*team members*

**500+**

*partners*

Note: These benchmarks are guidelines based on our survey results. Actual capacity may vary depending on partner complexity, program maturity, and team experience levels.

The solo manager outlier:

While solo managers are common for smaller businesses, they face significant challenges. Among solo managers, only 33% feel their team size is sufficient, while 43% believe their team size is insufficient. They're often stretched thin, which can hinder growth.

What the data tells us:

Data reveals a positive correlation between affiliate team size and revenue earned from affiliate programs. As team size increases, so does the program's financial impact. Larger companies often have bigger affiliate marketing teams, which explains this trend.

Our data has shown that these larger teams are better equipped to manage and support a greater number of active partners effectively. However, the principle extends beyond scale — it reflects a truth that holds for businesses of any size.

What's interesting is how this opens up a new way of thinking. Businesses across the spectrum — from nimble startups to global enterprises — are achieving significant gains through partnership marketing.

Percentage of company revenue from affiliate program	Size of affiliate team	1 person	2-3 members	4-5 members	6-10 members	+10 members
	Less than 5%	14%	3%	2%	0%	1%
	5%-10%	48%	19%	7%	5%	5%
	11%-15%	5%	21%	17%	19%	13%
	16%-20%	14%	25%	25%	24%	10%
	21%-25%	5%	12%	23%	17%	20%
	26%-30%	5%	12%	16%	19%	19%
	31%-50%	5%	6%	7%	9%	13%
	More than 50%	5%	0%	2%	6%	16%

Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).  
Questions: What is the size of your affiliate marketing team? and What percentage of your company's revenue is generated from your affiliate program?  
Note: 'Unsure' responses excluded.



## Skills that drive performance

Affiliate marketing success requires a different skill set than traditional performance marketing. Managing partnerships demands specialized expertise across three key areas:

### Strategic thinking and planning

Aligning programs with broader business goals

39%

### Partner relationship management

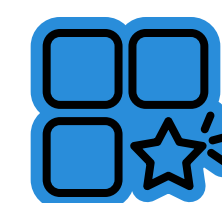
Building and nurturing productive partnerships

37%

### Knowledge of affiliate platforms and networks

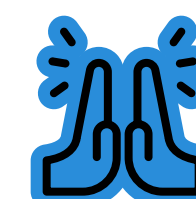
Leveraging technology effectively

35%



These skills distinguish affiliate marketing from other performance channels:

Unlike managing paid ads or email campaigns, affiliate success requires a unique approach. It involves building genuine business relationships with external partners, navigating complex multi-party attribution systems, and balancing brand standards with partner autonomy.



The confidence level is encouraging:

75% of brands believe their teams have the right skills and expertise to manage their affiliate programs effectively.

Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).

Questions: What skills are most important for affiliate marketers? Select all that apply.

Note: Top 3 responses shown.

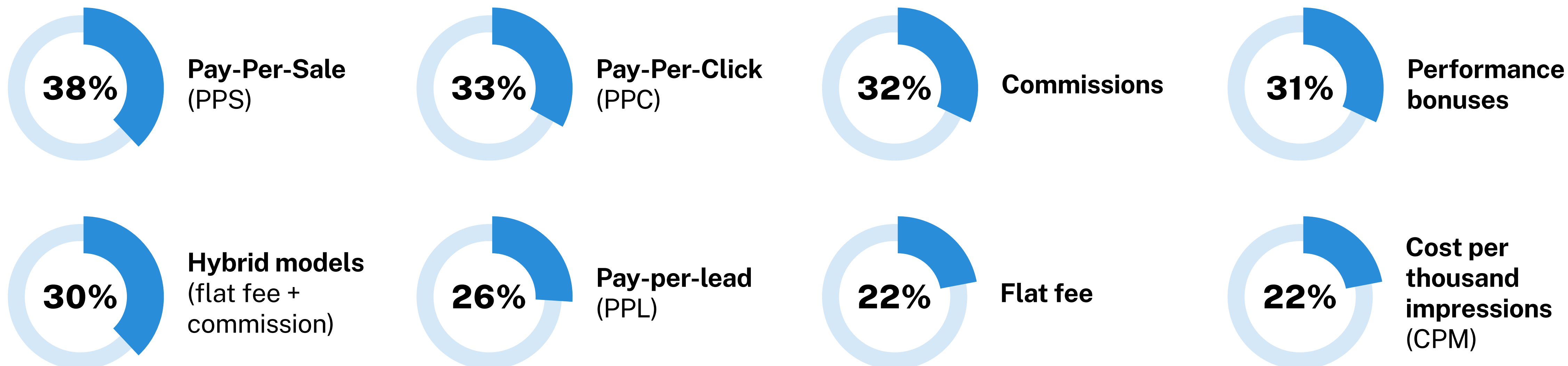


## Compensation strategy optimization

Sophisticated funding demands flexibility in partner compensation. Brands now use an average of 2-3 different compensation models, tailoring incentives to fit different partner types and campaign objectives.

**But critical misalignments exist between partner preferences and brand offerings — creating prime optimization opportunities.**

Current model preferences show performance focus:



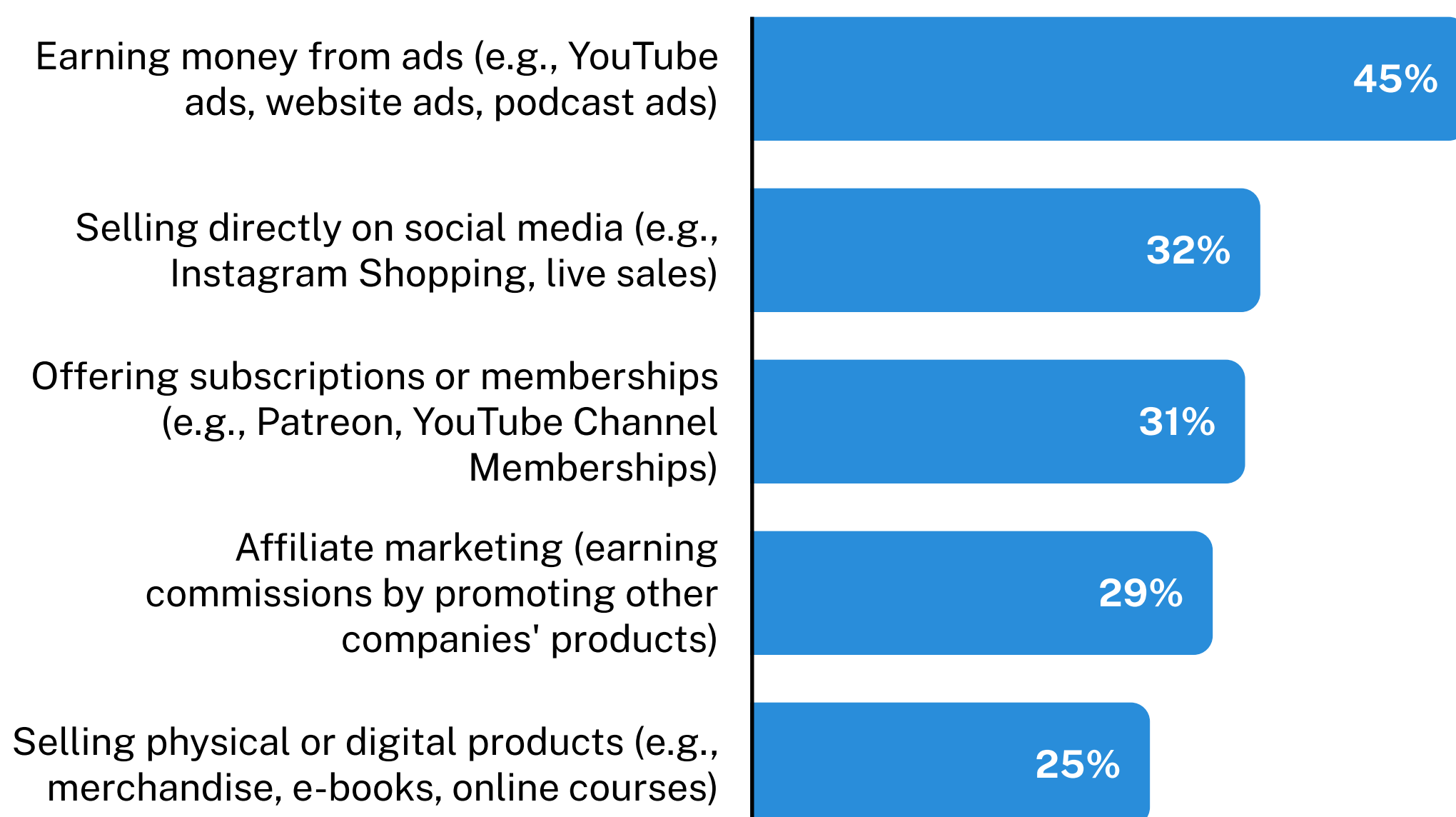
Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).

Question: Which compensation models do you use for your affiliate partners? Select all that apply.

## Creator investment realities

**Creators operate as entrepreneurs.** Nearly every creator (99%) runs a diversified business model, using 2-3 income strategies on average. Affiliate marketing ranks 4th globally (29%) in their income mix, behind ads (45%), social selling (32%), and subscriptions and memberships (31%).

### Top 5 income growth strategies for creators



Source: Creator Survey (n=421), The State of Affiliate Marketing (2025).

**Question: What strategies are you using or planning to use to grow and diversify your income? Select all that apply.**

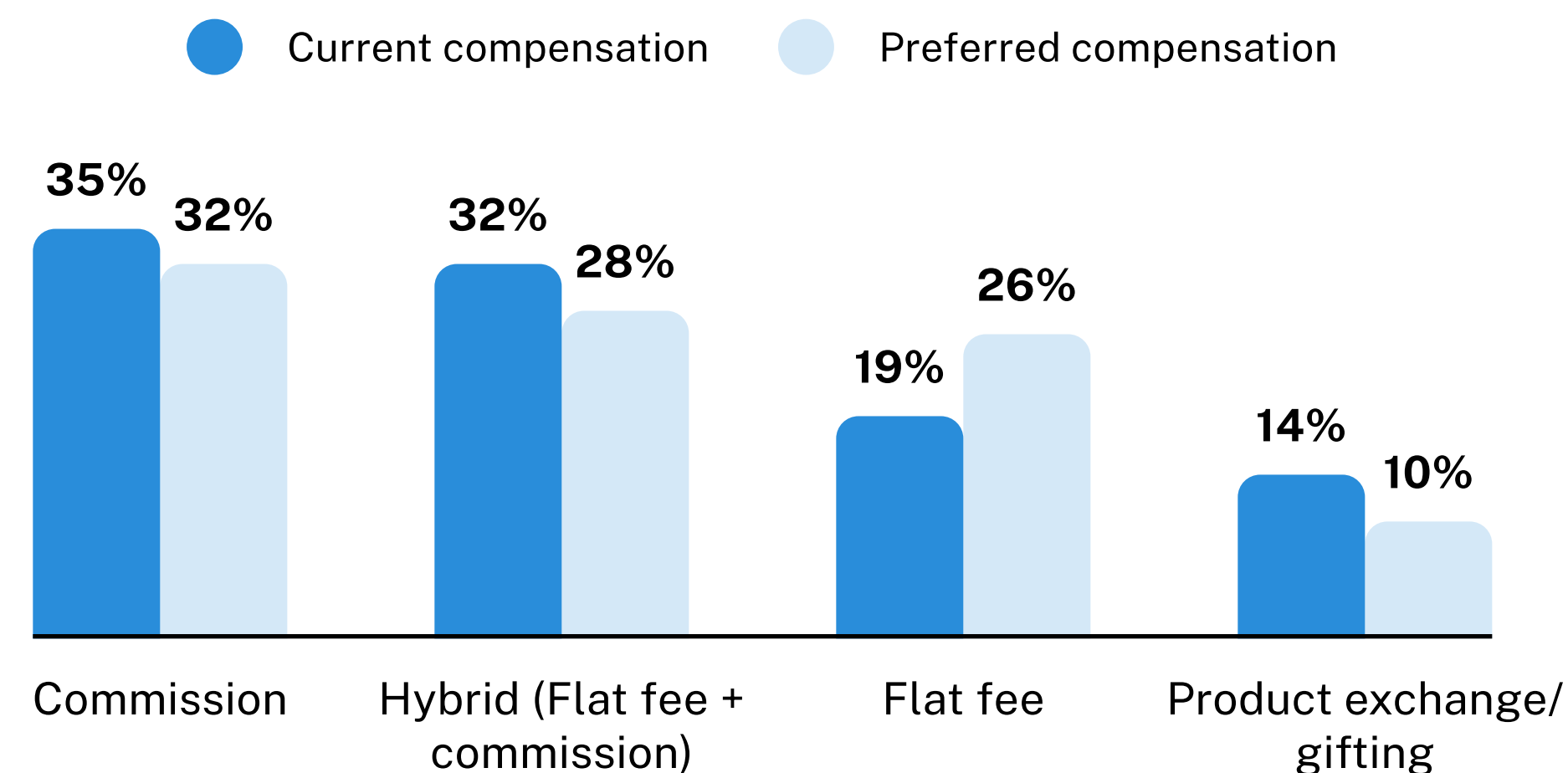
## The compensation gap is significant:



**26% of creators prefer flat fees to guarantee payment, but only 19% currently receive them.**

Creators often face upfront costs to produce high-quality content — like equipment, software, and time — and commission-based pay adds financial risk with no guarantee of recouping those expenses. For many creators, flat fees provide the stability and security needed to confidently invest in their craft without the uncertainty of variable earnings.

### Current vs. preferred creator compensation



Source: Creator Survey (n=421), The State of Affiliate Marketing (2025).

**Question: What is the primary way you're compensated for brand collaborations? and What is your preferred way of being compensated for brand collaborations?**

Note: "I have no preference" (4%) responses for the preferred model question are excluded.

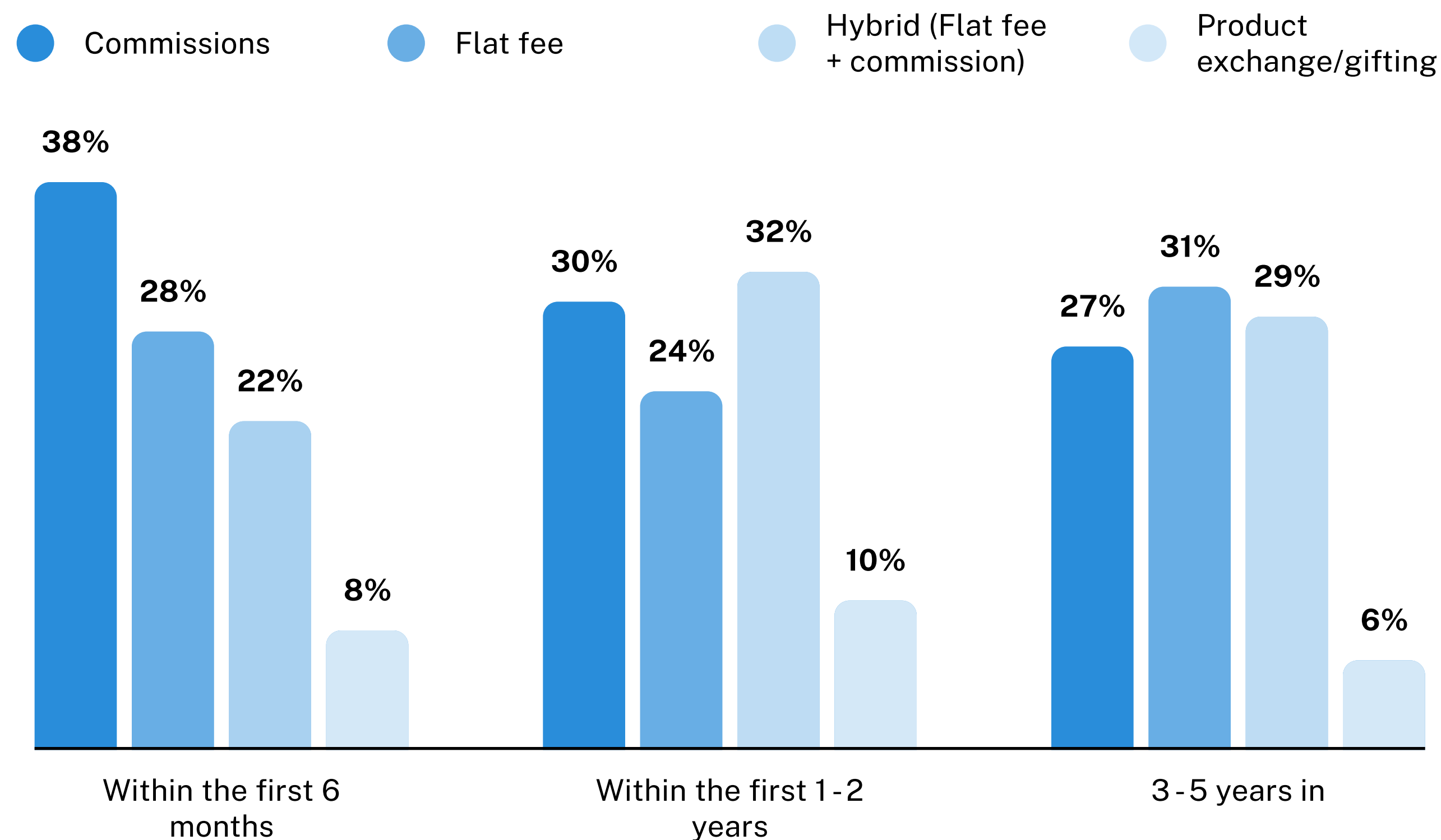
The professionalization curve affects compensation expectations and is based on when creators started incorporating affiliate marketing into their strategy:

- **Newcomers to affiliate marketing (1-6 months):** Prefer simple payment structures, with pure commissions (38%) as the top choice and flat fees (28%) as a strong secondary
- **Growing creators (1-2 years):** Shift away from simple models toward hybrid payment structures (32%)
- **Experienced creators (3-5 years):** Prioritize security, favoring flat fees (31%) and hybrid models (29%)

**Despite commission model popularity, creator demand is shifting:** While brands push commission and hybrid structures, creator demand for these models is lower (-3pp and -4pp, respectively). Many creators accept these deals but settle for less than their preference.

To add complexity, this creator demand-supply gap varies around the globe ([Appendix C](#)). The brands that win will be those that tailor their compensation strategies market by market.

Creator compensation preferences by experience level



Source: Creator Survey (n=421), The State of Affiliate Marketing (2025).

Question: What is your preferred way of being compensated for brand collaborations? and When did you first begin incorporating affiliate partnerships into your monetization strategy?

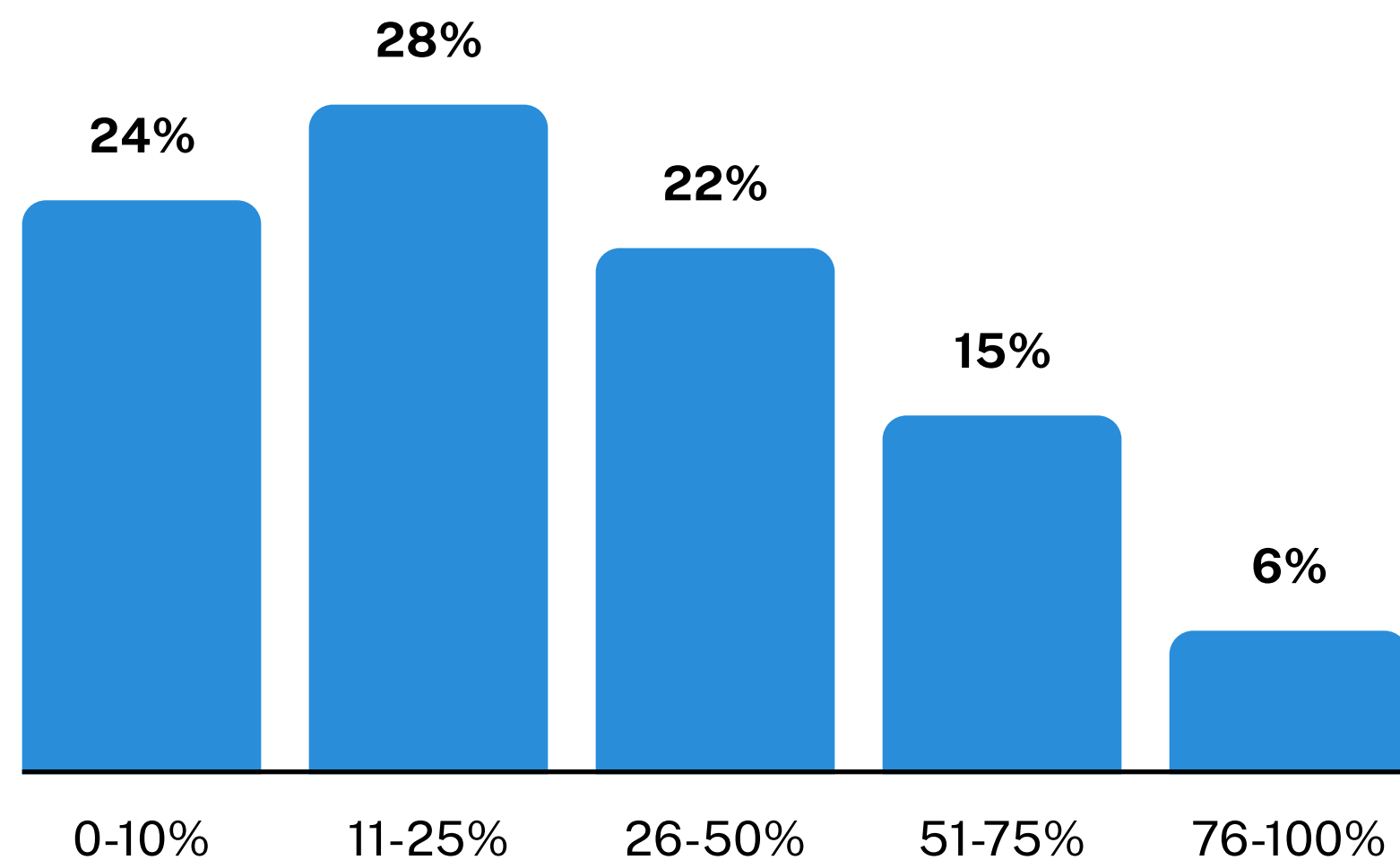
Note: 'I have no preference' responses are excluded.

## Publisher investment strategy

### Publishers face critical tension between affiliate investment and diversification.

While affiliate marketing generates 11-25% total revenue (28%), a third dedicate less than 10% of their operating budget to the channel.

Publisher revenue from affiliate marketing

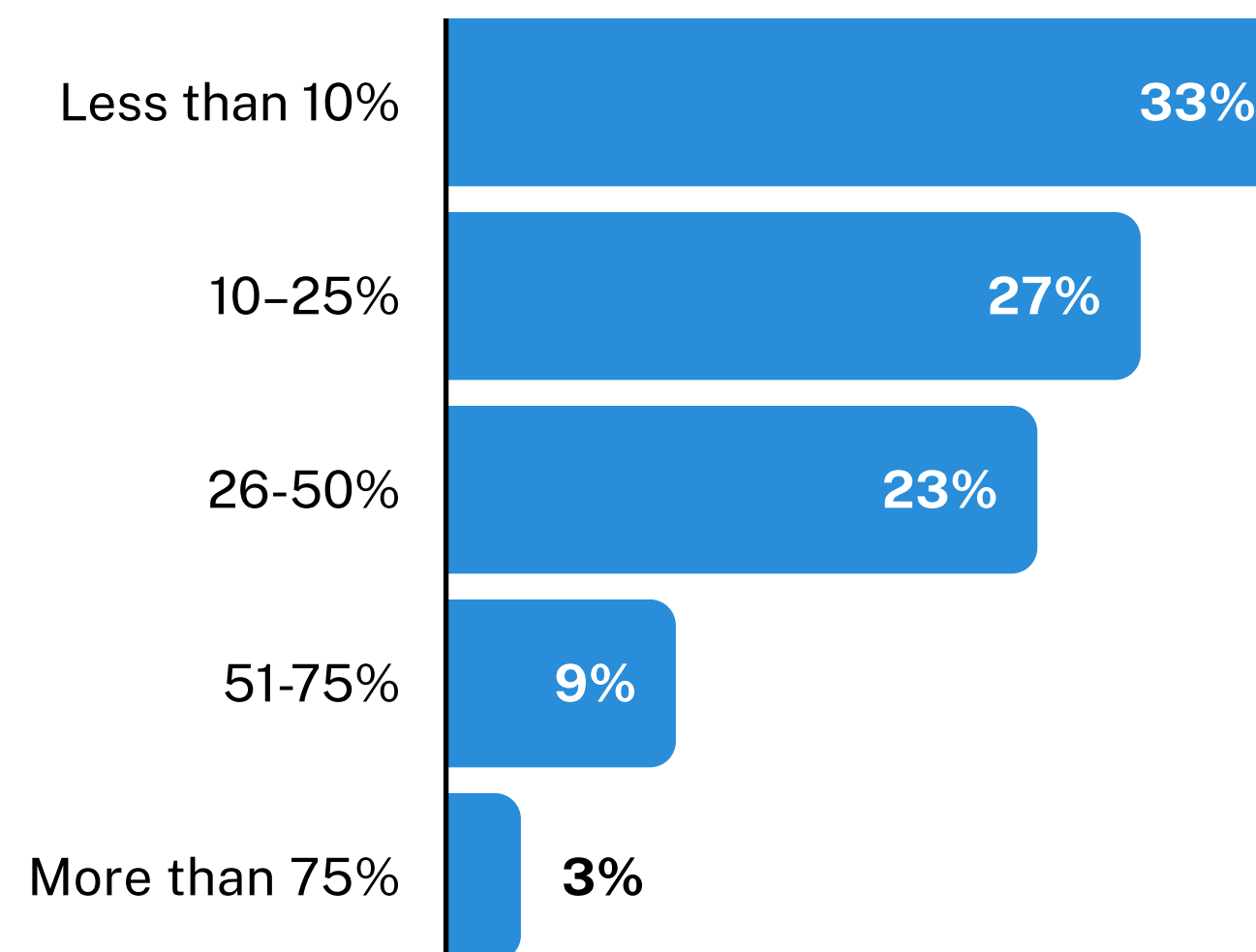


Source: Publisher Survey (n=284), The State of Affiliate Marketing (2025).

Question: What percentage of your total company revenue is generated from affiliate marketing?

Note: 'Unsure' responses excluded.

Share of operating budget dedicated to partnerships



Source: Publisher Survey (n=284), The State of Affiliate Marketing (2025).

Question: What percentage of your company's total operating budget is dedicated to running your affiliate/ partnership business?

Note: 'Unsure' responses excluded.





The

# Global Compensation gap



**The push for diversification shapes compensation preferences:** Nearly half (47%) of publisher programs rank diversifying income streams as a top goal. Many are achieving this by increasing revenue from fixed fees and paid placements, which saw the strongest growth (44% reporting increases), signaling a shift toward more optimized, partnership-driven models.

The following table below reveals key misalignments between publisher preferences and how they are currently compensated. It highlights the challenges of balancing predictable income, performance-based pay, and shared risk in affiliate partnerships.



**The intelligent insight:**

Publishers want payment for what they control (traffic via CPC) rather than carrying conversion risk that depends on factors beyond their control like brand website performance, pricing, and product quality.

Compensation model	Preferred	Current	Key Insight
Cost Per Click (CPC)	42%	28%	<b>Misalignment:</b> Biggest gap. Publishers want payment for traffic (what they control)
Fixed Fee	36%	30%	<b>Misalignment:</b> Publishers want more predictable income to reduce risk
Cost Per Sale (CPS)	35%	44%	<b>Misalignment:</b> Current top model isn't the most preferred. Publishers resist conversion risk
Hybrid Model	27%	33%	<b>Misalignment:</b> Lower preference, likely due to CPS components
Performance Bonuses	27%	27%	<b>Aligned:</b> Content with current frequency
Cost Per Lead (CPL)	25%	23%	<b>Aligned:</b> Similar ranking in current and preferred
Cost Per Thousand (CPM)	19%	15%	<b>Slight misalignment:</b> Small appetite for awareness-based pay

Source: Publisher Survey (n=284), The State of Affiliate Marketing (2025).  
Questions: How are you typically compensated when working with brands? and How would you prefer to be compensated when working with brands? Select all that apply

The biggest challenge in expanding the affiliate program into international markets



### Global investment variations

**International expansion remains challenging:**

Only 3% of brands with global programs report no obstacles in international expansion, emphasizing the need for market-specific investment approaches.

**Brands face tension:**

The top challenges reveal competing priorities — maintaining consistent brand standards globally while adapting content for local languages and cultures. This dual pressure forces brands to balance global control with local relevance, making international expansion particularly complex for partnership programs.

Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).  
**Questions: What has been the biggest challenge in expanding your affiliate marketing program into international markets?**  
 Base: Respondents with international affiliate programs (n=675).  
 Note: 'Other' and 'We haven't experienced any challenges' responses are excluded.



# Assess

*your  
investment  
approach*



# Assess **your investment approach**



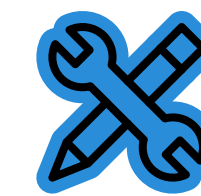
## Budget allocation evaluation:

How does your current allocation compare to the 21-30% benchmark? Are you seeing revenue returns that justify your investment level?



## Team capacity analysis:

Based on your partner count, is your team properly sized? Solo managers with 50+ partners may be hitting efficiency limits that hinder growth.



## Skills gap assessment:

**Do you have the three critical capabilities:**

Strategic thinking (39%), relationship management (37%), and platform expertise (35%)?



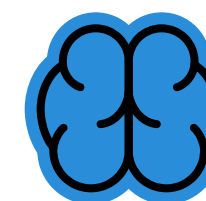
## Balancing global brand standards locally:

In your international expansion efforts, are you balancing consistent global brand standards with adapting marketing content and messaging for local languages and cultures?



## Partner alignment review:

Do you understand the financial realities driving your creators and publishers? Are you addressing their compensation preferences?



## Investment mindset check:

Are you viewing partnerships as a cost center to optimize, or a profit driver to scale? The data shows 71% believe affiliate marketing is more cost-effective than other marketing channels.



## Compensation strategy audit:

Are you tailoring compensation models to different partner types? Are you using 2-3 models, and is there a gap between what you offer and what your partners prefer?



# Next steps

to

*optimize  
your  
investment*



## Next steps to optimize your investment



01

### Calibrate your budget for growth:

If your investment falls below the industry benchmark range (21-30%), build a data-backed case for an increase. With 75% of brands increasing budgets, justify the investment by modeling potential revenue growth and underscoring key efficiency metrics.

02

### Right-size your team:

Use the team size benchmarks to evaluate staffing needs. The correlation between team size and revenue justifies thoughtful hiring.

03

### Address skill gaps:

Focus team development on the three critical areas, particularly if you're expanding into creator partnerships or international markets.

07

### Tailor investment approaches to market-specific needs:

Balance global brand consistency with local content and messaging adaptation.

06

### Bridge partner compensation gaps:

Launch pilot programs addressing specific misalignments — CPC options for publishers who drive quality traffic, and larger flat fee components for creators to reduce their financial risk.

05

### Key gaps to address:

- Publishers prefer CPC (42%), but many brands offer CPS
- Creators prefer flat fees (26%), but only 19% receive them
- Test hybrid models that provide security with performance upside

04

### Audit your compensation strategy:

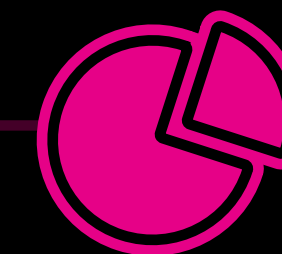
Survey your top partners about payment preferences.

03

*Deploy*



*for scale*



# *The era of AI-powered partnerships is here.*

Artificial intelligence has moved from an experimental tool to an essential infrastructure.

**97%**

*Almost  
every brand*

**96%**

*Creator*

**87%**

*Publisher*

*has integrated AI into their work,  
fundamentally changing how the entire ecosystem operates.*

The move from manual, labor-intensive processes to intelligent, scalable systems is the new standard for growth.

## The adoption reality across the ecosystem

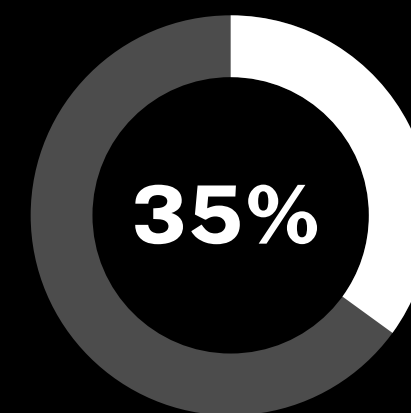
AI adoption is no longer about "if" but "how." Each player in the ecosystem is wielding AI for different advanced purposes, creating new opportunities for collaboration and competitive advantage.

### Brands focus on customer experience and partner management:

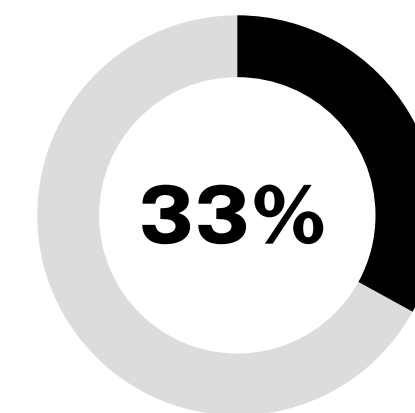
- **Chatbots for customer support (35%)**  
-direct customer engagement
- **Predictive analytics and optimization (33%)**  
-forecasting and performance improvement
- **Partner performance analysis and feedback (32%)**  
-data-driven relationship-building
- **Personalization (31%)**  
-website/app offers and email marketing

### How brands are applying AI: The top 5 uses

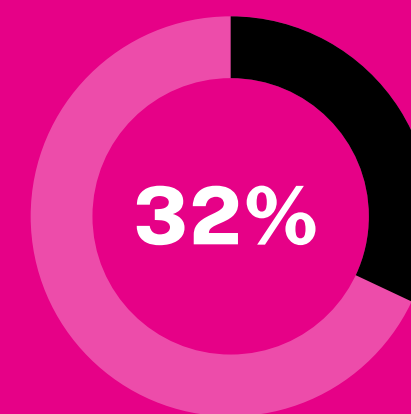
**Chatbots**  
in customer  
support



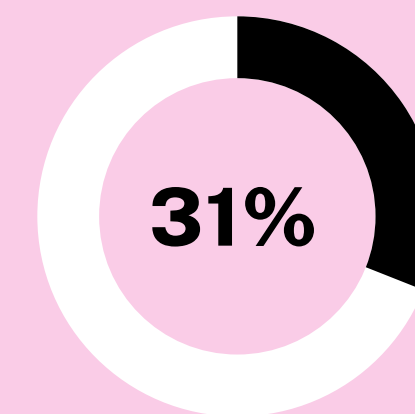
**Predictive**  
analytics and  
optimization



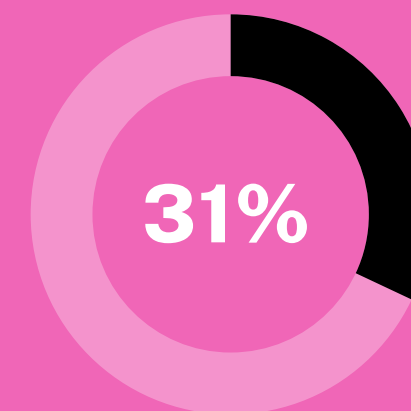
**Partner**  
performance  
analysis and  
feedback



**Personalizing**  
website/app  
offers



**Personalized**  
email  
marketing



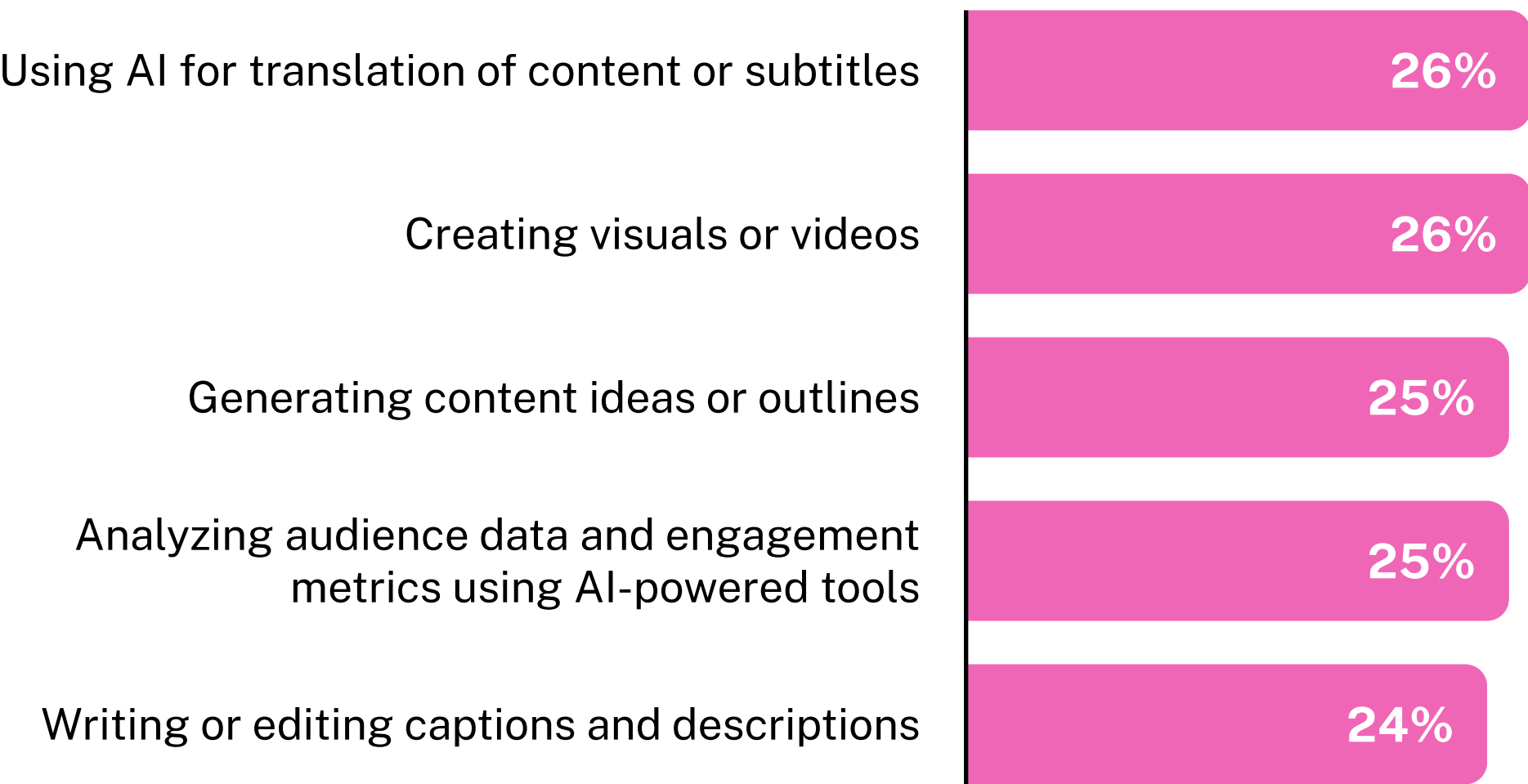
Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).

Question: How is your company using Artificial Intelligence (AI) in its affiliate marketing strategy? Select all that apply.

Creators emphasize creativity and audience insight:

- **Content translation and subtitles (26%)** - global reach expansion
- **Visual and video creation (26%)** - enhanced creative production
- **Content ideas and outlines (25%)** -creative brainstorming assistance
- **Audience data and engagement analysis (25%)** -performance understanding

Top 5 AI uses for creators

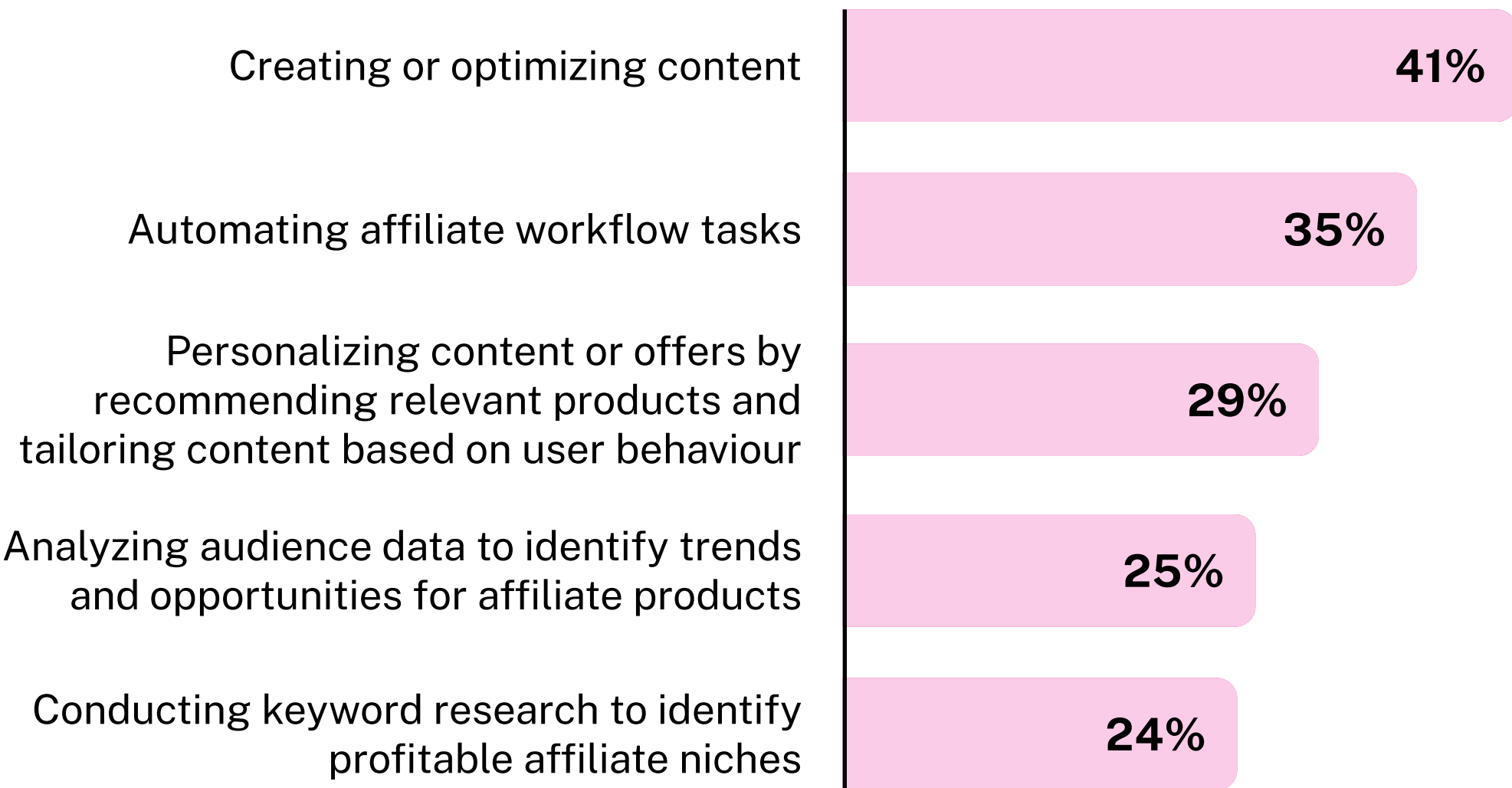


Source: Creator Survey (n=421), The State of Affiliate Marketing (2025).  
**Question: How are you currently using Artificial Intelligence (AI) tools or features in your content creation or affiliate marketing activities? Select all that apply.**

Publishers lead in content and workflow optimization:

- **Content creation and optimization (41%)** -highest usage across ecosystem
- **Automating affiliate tasks (35%)** -workflow efficiency
- **Personalizing content or offers (29%)** -targeted audience engagement
- **Audience trend analysis (25%)** -intelligent market insights

Top 5 AI uses for publishers



Source: Publisher Survey (n=284), The State of Affiliate Marketing (2025).  
**Question: How is your company using Artificial Intelligence (AI) in your affiliate marketing program? Select all that apply.**



## The competitive pressure driving adoption

**AI's near-universal adoption responds to fierce competitive pressure for creators and publishers.** By making content creation easier and more accessible, AI lowers barriers to entry, enabling more people to join the space. This intensifies the need for partners to stand out in crowded markets.

The competitive dynamics show:

**38%**

of creators cite increased AI use by competitors for content creation and optimization as a major industry change

**32%**

of publishers identify AI adoption for content creation and optimization as a top industry transformation

**As more competitors adopt AI for content creation and optimization, publishers and creators must embrace these tools to remain competitive.** Publishers (31%) see AI as key to improving efficiency and performance in the next year. Similarly, 31% of brands plan to leverage AI for program management and personalized offers, opening doors to collaborations with more sophisticated, tech-savvy partners.

## The growth opportunities brands are missing

**While adoption is high, application varies dramatically.** Each ecosystem player has untapped AI potential that creates partnership opportunities:

### Brand opportunities:

- Using AI tools to improve program management and personalize offers (31%) ranks as the top growth opportunity brands identify.
- The top growth opportunity is doubling down on AI. Forward-thinking brands actively explore tools to enhance programs and expand their technological footprint.

### Creator monetization gaps:

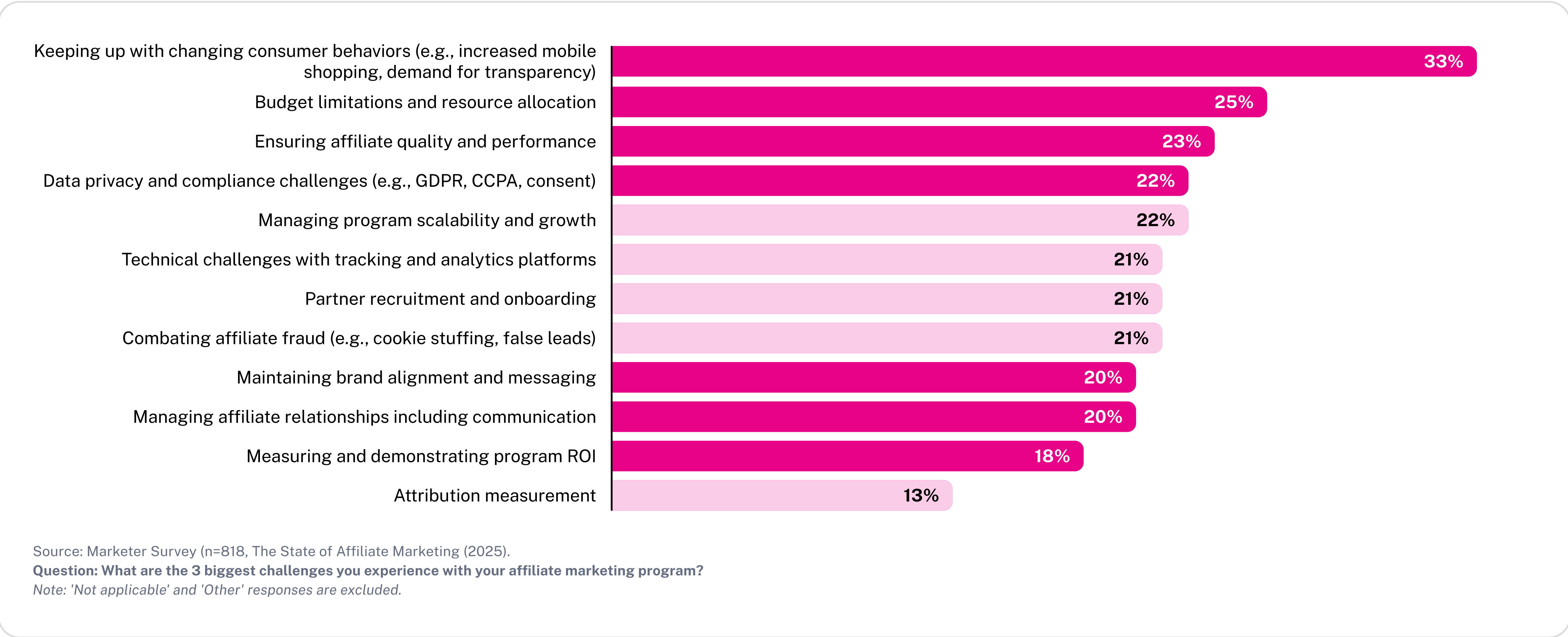
- Creators underutilize AI for core revenue and business growth tasks: Affiliate link tracking (18%), SEO optimization (15%), and brand partner identification (15%).
- This represents an untapped opportunity to directly drive their business forward through better partnership tools.

### Publisher partnership management gaps:

- Less than 20% use AI for new partner identification (19%) and performance analysis (18%).
- This presents a critical improvement area and a new competitive front for partnership platforms.

# Technical hurdles and scalability challenges

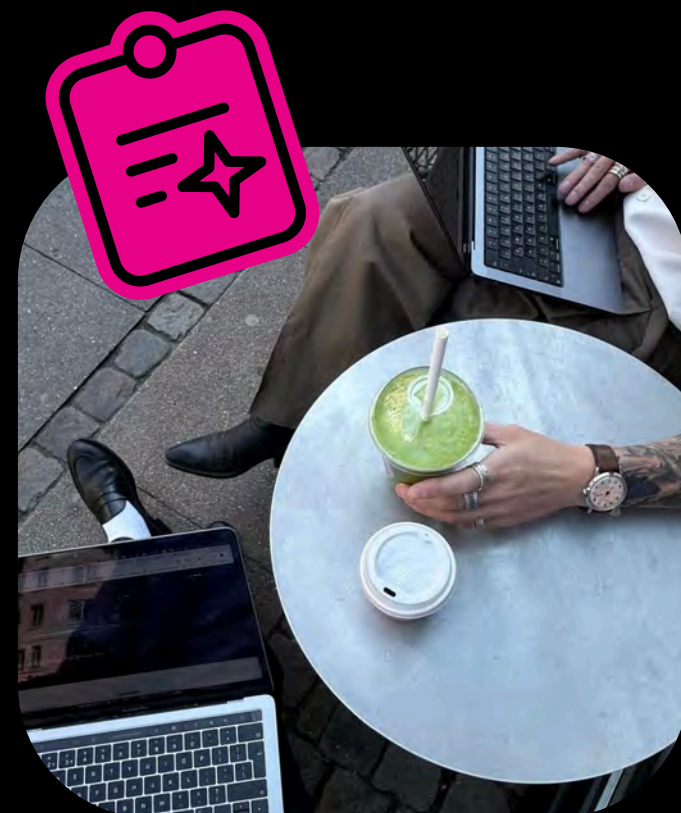
**Technology barriers remain a key challenge for 21% of brands.** Issues with tracking and analytics platforms create bottlenecks that AI can help resolve. Additionally, managing program scalability and growth challenges (22% of brands) — exactly where AI automation provides the greatest value.



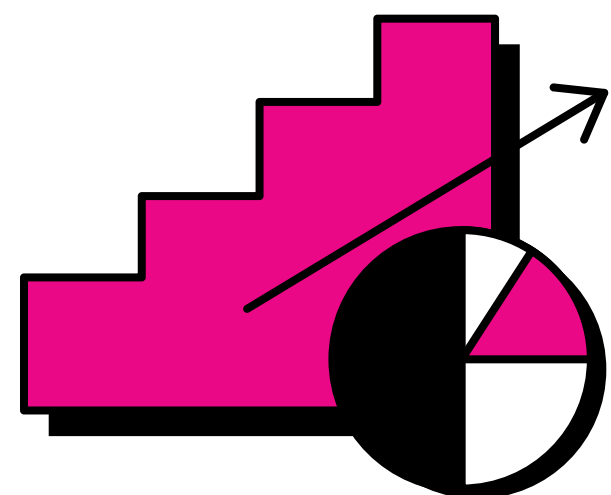


# Assess

*your AI  
deployment  
strategy*



# Assess your AI deployment strategy



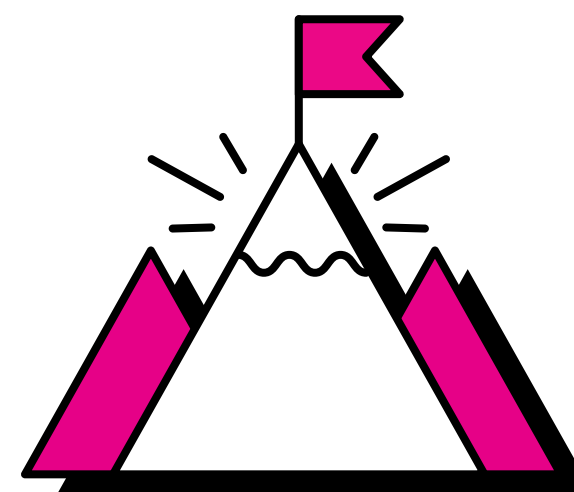
## Current usage evaluation:

Are you using AI across 2-3 applications like high-performing programs? Which of the top use cases (chatbots, predictive analytics, partner analysis, and personalization) are you missing?



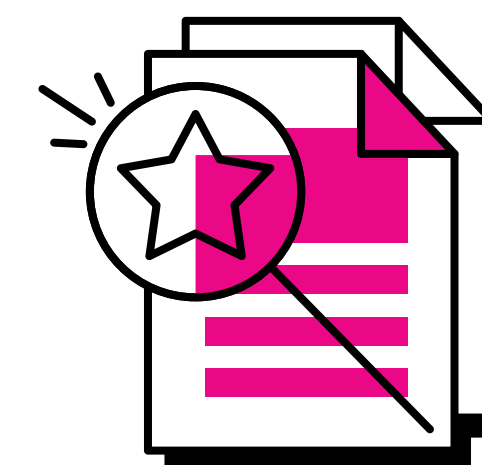
## Ecosystem alignment check:

How does your AI strategy complement what your partners are already using? Are you providing AI-powered tools that help partners succeed?



## Growth opportunity analysis:

Are you leveraging AI for the top growth opportunity (efficiency and campaign performance improvement), or still focused on manual processes?



## Competitive advantage assessment:

With near-universal adoption, how is your AI implementation creating differentiation, rather than just matching market baseline?



## Partnership empowerment review:

Are you using AI just for your own benefit, or offering AI-powered insights and tools that make your partnerships more valuable?



# Next steps

to

*deploy* AI  
*intelligently*

## Next steps to deploy AI intelligently



01

### Conduct a workflow audit:

Map your weekly tasks and identify manual bottlenecks in partner recruitment, performance reporting, and compliance monitoring. These are prime automation targets.

02

### Start with high-impact automation:

- Streamline partner recruitment using AI-powered discovery to analyze millions of data points for perfect audience and brand alignment
- Automate performance analysis with real-time dashboards and predictive insights
- Implement fraud detection systems that automatically flag suspicious activity and protect program integrity

05

### Focus on competitive differentiation:

As AI adoption becomes the norm, your implementation must create unique value. Consider how you can use AI not just for efficiency but also to offer partners capabilities they can't get elsewhere.

04

### Address partner AI gaps:

- Support creator monetization by providing AI tools for affiliate tracking, SEO optimization, and brand discovery
- Enable publisher partnership management through AI-powered partner identification and performance analysis tools
- Align with partner AI strategies to create seamless, mutually beneficial technological integration

03

### Deploy predictive optimization:

- Dynamically optimize commission structures using AI to identify which partners drive the highest LTV and new customer acquisition
- Forecast campaign outcomes for more realistic targeting and smarter budget allocation
- Personalize customer journeys at scale by serving relevant partner content based on real-time behavior analysis





04

*Elevated*

**creator**

**Partnerships**



**Creators have emerged as incredibly valuable partners in modern affiliate marketing.** Forward-looking brands are no longer treating influencers as solely a top-of-funnel play. Instead, they're embracing them as powerful, full-funnel partners who deliver on both performance metrics and critical brand-building goals simultaneously.

**The investment momentum is unmistakable:** 59% of brands plan to dedicate a quarter or more of their affiliate budgets to influencer partnerships, of which 18% are allocating over half their program budget. Only 2% have no plans to invest resources.

*The creator economy boom is driving investment*

**Partnership portfolios are becoming creator-centric.** Social media influencers are set for explosive growth, with a projected net increase in collaboration in the next year of +14pp — the highest of any partner type.

Budget commitment reflects key objectives:

59%

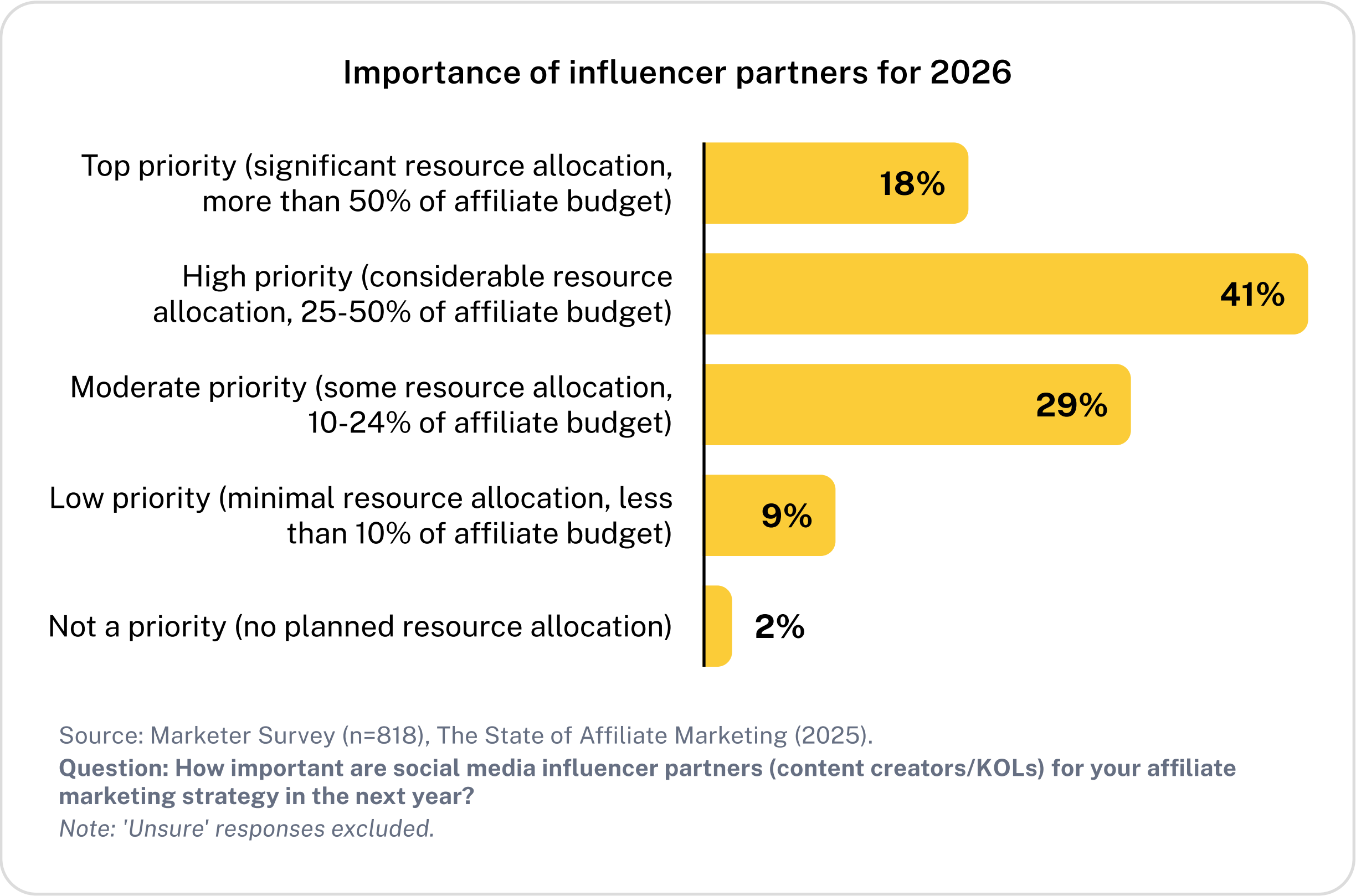
of brands plan to dedicate 25%+ of affiliate budget to influencer partnerships

18%

intend to allocate over 50% of the program budget to creators

11%

Only 11% are not prioritizing influencer partnerships





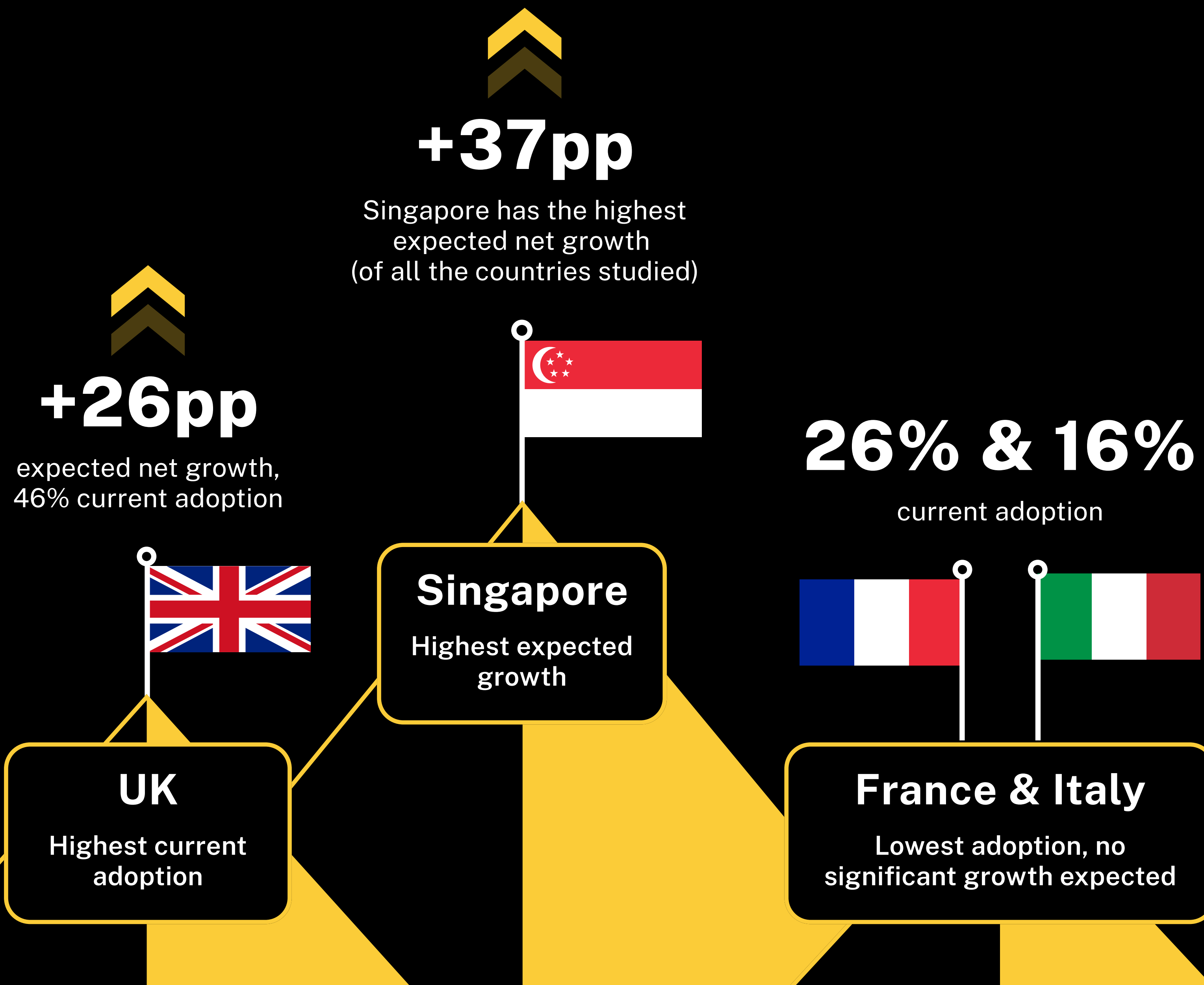
# Influencer partnerships: Growth by region

But this trend isn't uniform globally. The creator economy is booming in specific markets:

## For global brands:

A one-size-fits-all creator strategy is doomed to fail. Success demands a nuanced, market-by-market approach.

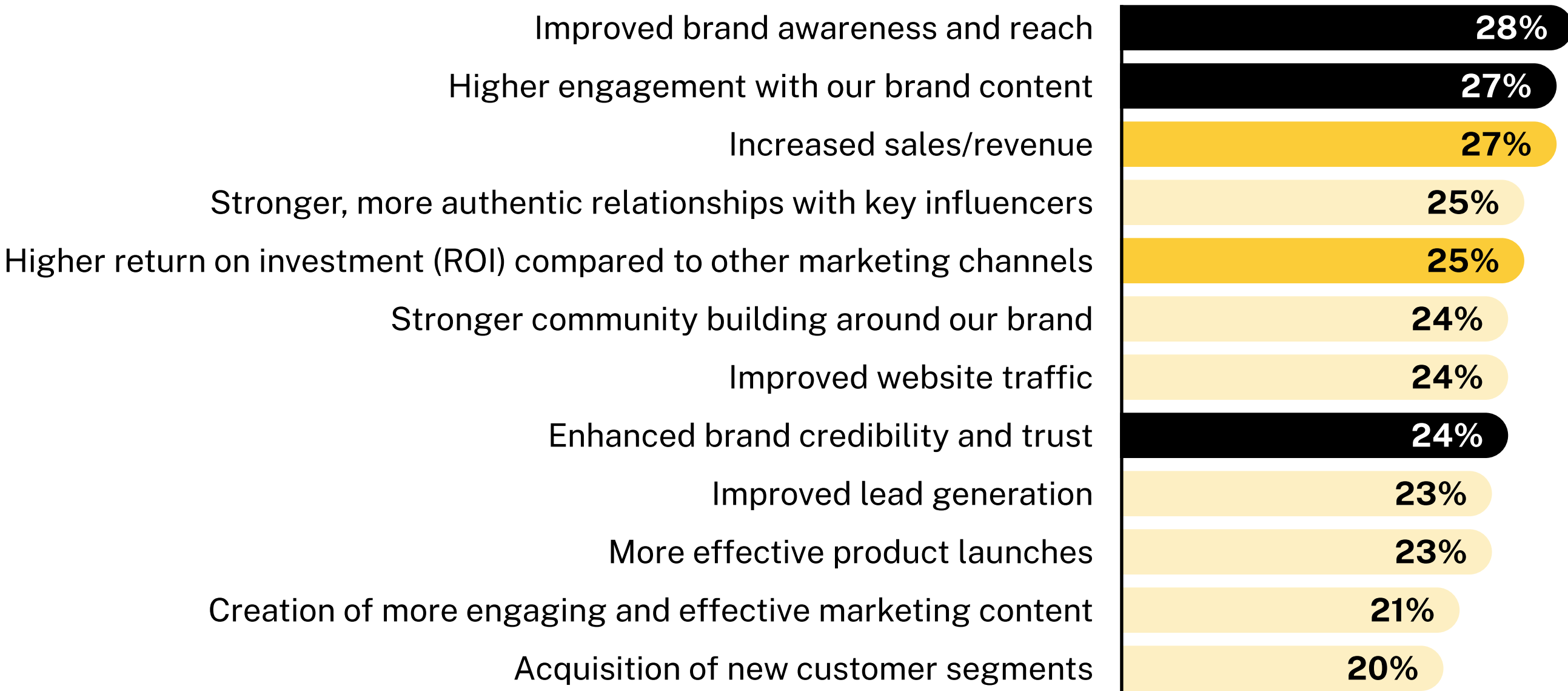
[\[Appendix B\]](#)



# The dual-outcome advantage of creator partnerships

**Influencers are the Swiss Army Knife of partnerships**, delivering on hard performance metrics and critical brand-building goals simultaneously. The marketer data confirms this dual power:

## Key outcomes from influencer collaborations



### Performance outcomes:

- **Increased sales and revenue (27%)** - direct revenue impact
- **Higher ROI compared to other marketing channels (25%)** - efficiency gains

### Brand-building outcomes:

- **Improved brand awareness and reach (28%)** - top-funnel impact
- **Higher engagement with brand content (27%)** - audience connection
- **Enhanced brand credibility and trust (24%)** - reputation building

Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).  
**Question:** What results have you achieved with your affiliate marketing program, specifically because of your collaborations with influencers (content creators/KOLs)? Select all that apply.  
Base: Respondents who work with influencers as part of their affiliate program (n=801).  
Note: "Too early to determine" and "Other" responses are excluded.

In an era of full-funnel campaigns, partners with this range of capabilities have become increasingly attractive.

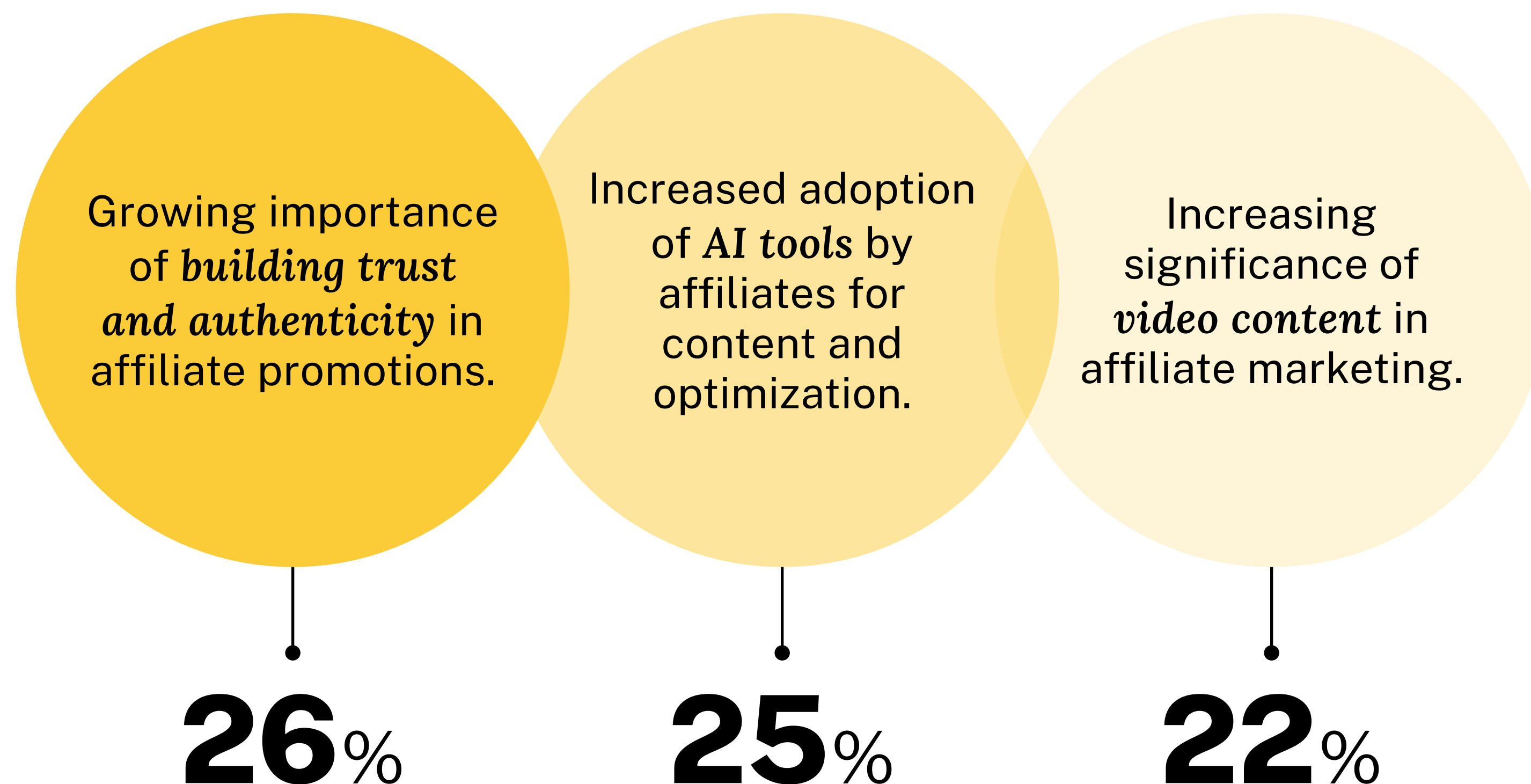
## Top 3 impactful changes in the affiliate industry

### Bridging the video content gap with influencers

**The insatiable demand for video content is another key driver behind creator investment surge.** For 22% of brands, the rising significance of video is one of the biggest changes they've seen in the affiliate industry over the last year.

**The opportunity is clear:** A third of brands (34%) call content creation and optimization a crucial skill for affiliate marketers. While they see video as a growth opportunity (21%), a dedicated video strategy remains a lower priority compared to other initiatives.

**Influencers step directly into this void.** They are the video experts, allowing brands to instantly capitalize on the trend without the costly and time-consuming process of building an internal video team.



Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).

Question: What are the 3 biggest changes you've seen in the affiliate industry over the last year that have had an impact on your business?

Note: Top 3 responses shown





# *The creator* professionalization evolution

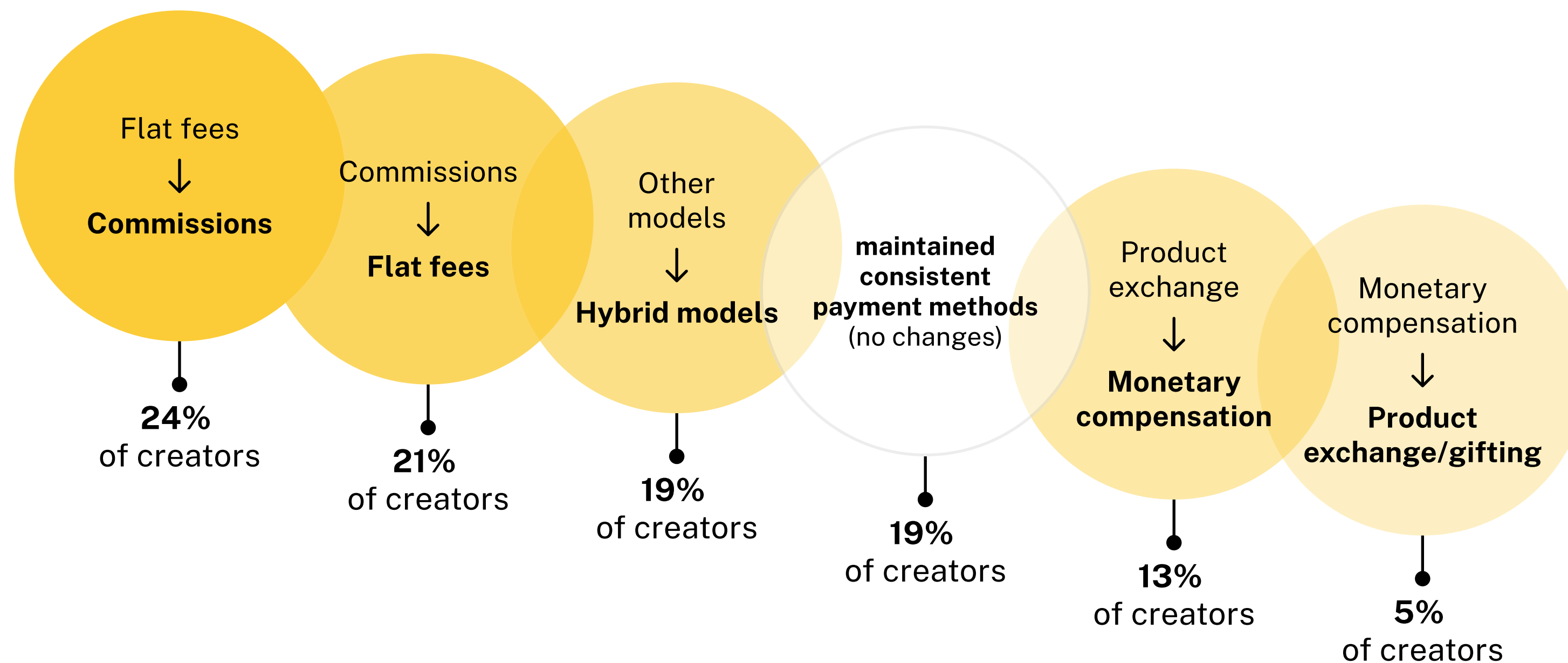




## The creator professionalization evolution

**The creator economy is rapidly professionalizing, creating new compensation and partnership dynamics.** Understanding these shifts is crucial for building effective relationships.

Compensation evolution shows market maturation:



Source: Creator Survey (n=421), The State of Affiliate Marketing (2025).

**Question: How has the primary method of compensation for your brand collaborations changed since you started your content creation business?**

Note: Percentages may not total 100% due to rounding.

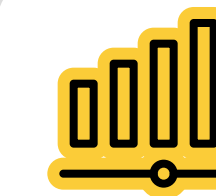
## Addressing creator compensation needs

**Understanding creator financial realities is crucial for elevated partnerships.** As discussed in our compensation strategy analysis, creators face unique challenges, including upfront content costs and the need for payment predictability.

### Key alignment opportunities:



**Address the flat fee gap**  
(26% prefer, only 19% receive)



**Design tiered compensation matching**  
professionalization levels

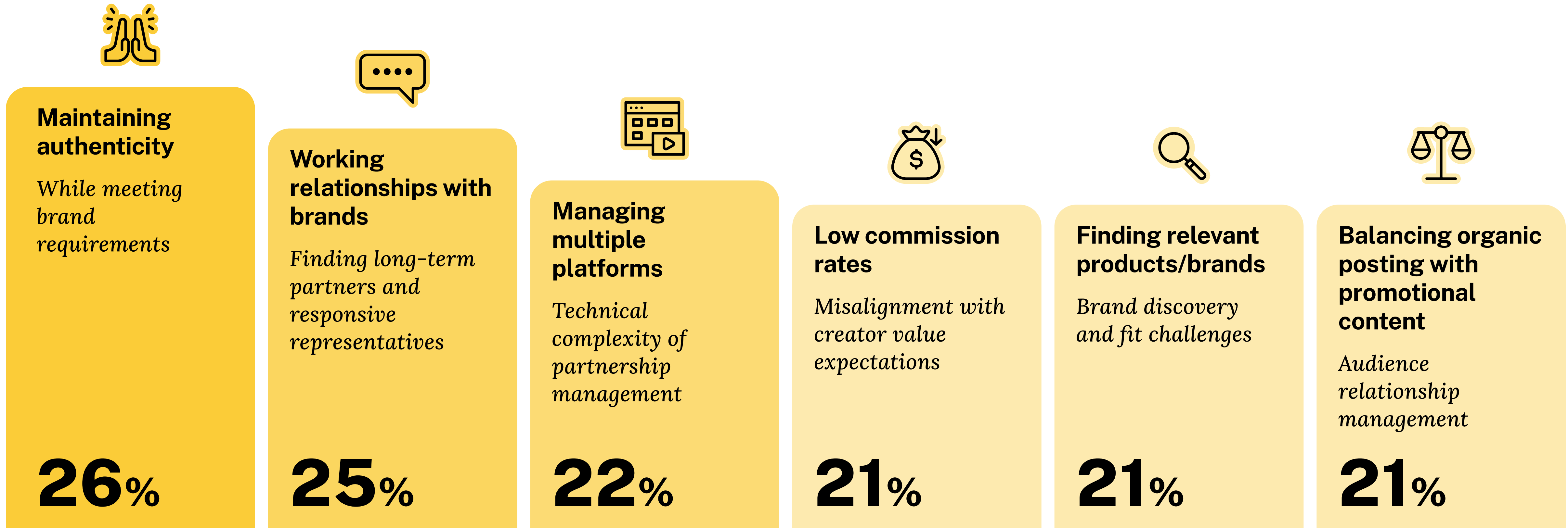


**Consider regional variations in**  
compensation preferences [\(see Appendix C\)](#)

For detailed compensation strategies and data, see [Creator investment realities](#).

# Creator challenges that brands can solve

Creators identify six significant challenges working on affiliate partnerships that sophisticated brands can address



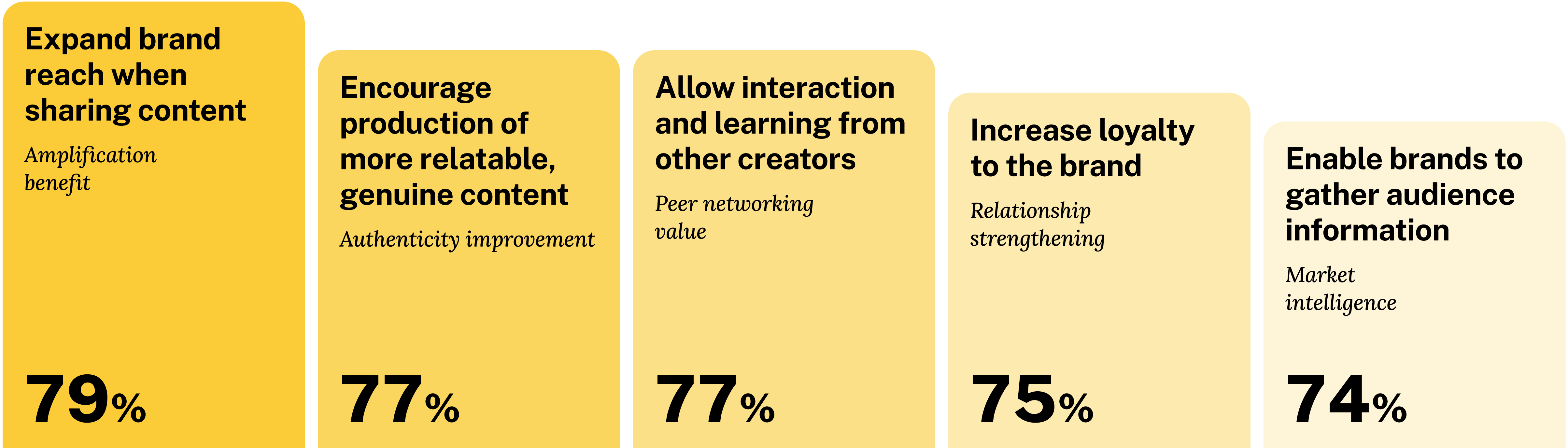
Source: Creator Survey (n=421), The State of Affiliate Marketing (2025).  
 Question: What are your biggest challenges when working on affiliate marketing partnerships? Select all that apply.  
 Note: The chart displays the top six challenges identified by creators.

# The creator community opportunity

**Brand-curated creator communities deliver measurable relationship improvements.**

The data shows they're well-received and effective, with a high likelihood of positive reception from creator partners. The value extends beyond brand-creator relationships, as peer networking, knowledge sharing, and collaboration are significant incentives for participation and critical for creator satisfaction.

A majority of creators agree on the key benefits of brand communities

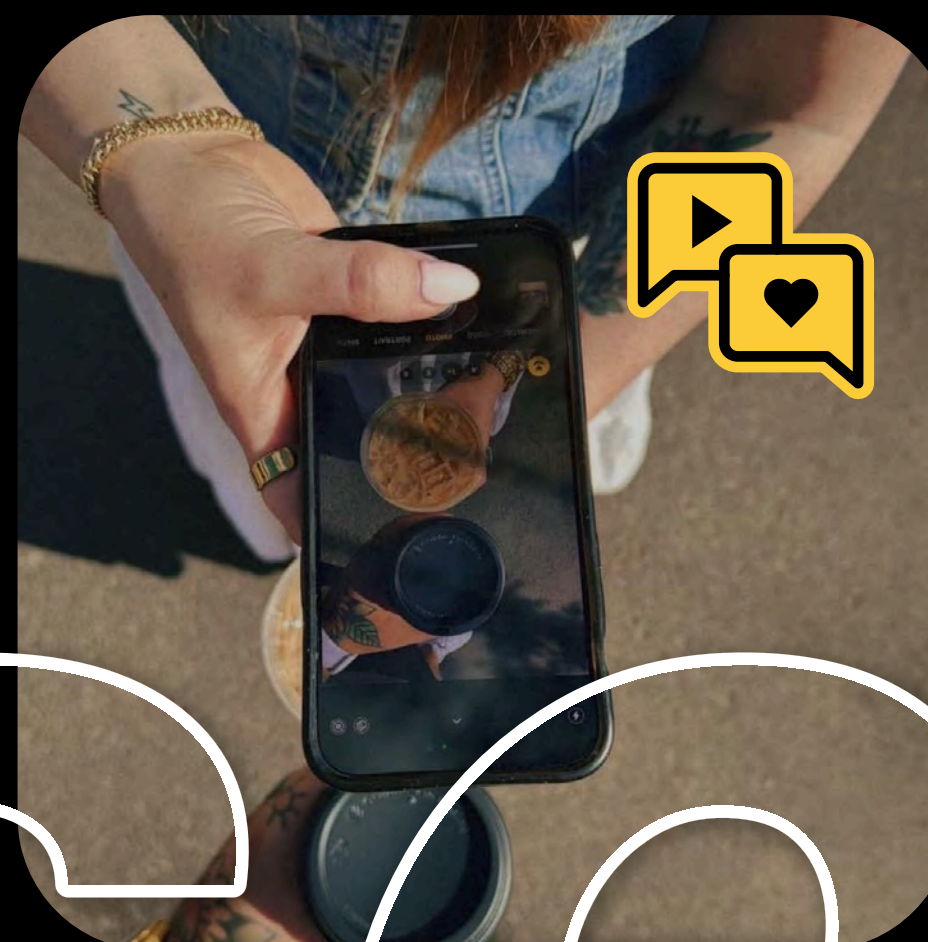


Source: Creator Survey (n=421), The State of Affiliate Marketing (2025).  
 Question: Please indicate your level of agreement with the following statements regarding creator communities curated by brands. Please answer “N.A” if you do not work with brands that have these communities.  
 Note: Percentages represent combined 'Agree' and 'Strongly Agree' responses.



# Assess

*your creator  
partnership  
strategy*





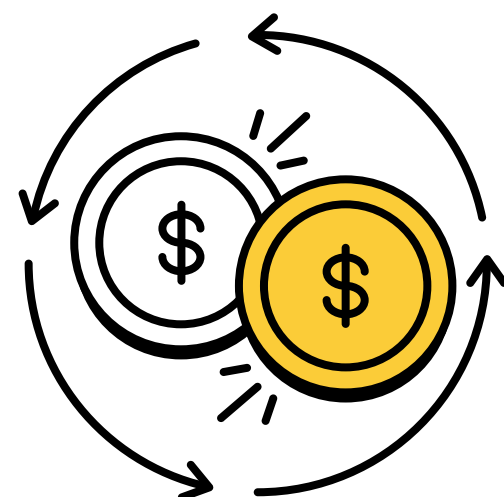


## Assess your creator partnership strategy



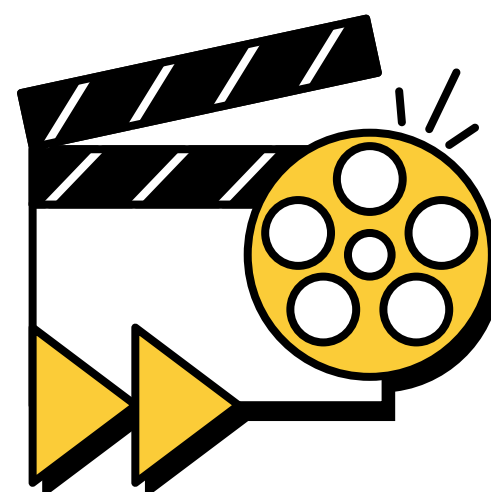
### Investment evaluation:

Are you allocating 25%+ of your affiliate budget to creators like 59% of high-performing brands? How does your regional strategy account for market variations?



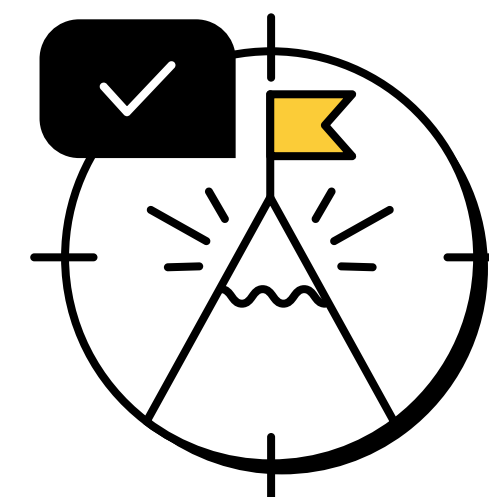
### Dual-outcome optimization:

Are you leveraging creators for both performance (27% sales increases) and brand building (28% awareness improvement), or limiting them to single objectives?



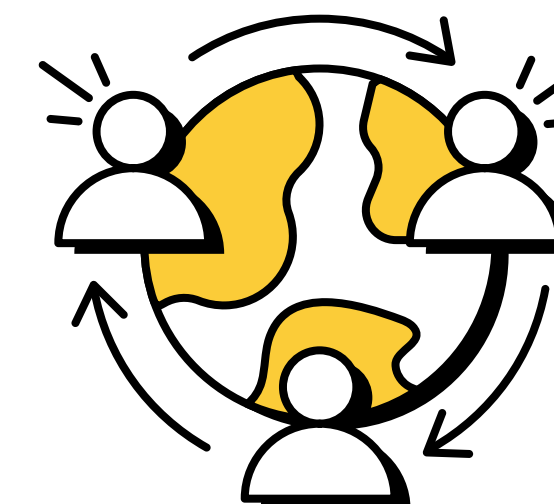
### Video content strategy:

With 22% citing growing demand for video content as a major industry change and 34% calling content creation a crucial skill, are you using creators to bridge your video content gap?



### Challenge resolution assessment:

Are you addressing the top creator challenges (authenticity 26%, brand relationships 25%, multiple platform management 22%) through your partnership approach?



### Community investment evaluation:

Have you considered creator communities as a relationship-building strategy, given the loyalty increase (75%) and reach expansion benefits (79%)?

# Next steps

to

*elevate  
creator  
partnerships*



## Next steps to elevate creator partnerships

### Solve creator challenges thoughtfully:

01

**Streamline platform management** with unified dashboards and simplified reporting to reduce creator friction and demonstrate you understand their operational pain points

**Improve brand relationship** processes with dedicated creator managers and responsive communication, making a direct investment in human connection to elevate partnerships beyond transactional exchanges

**Support authenticity** by providing creative freedom within brand safety guidelines, demonstrating respect for creator expertise while maintaining brand standards

### Implement creator community programs:

02

**Build peer networking opportunities** through monthly virtual meetups, collaborative content challenges, or exclusive creator-only messaging channels (like Discord) where partners can share best practices and cross-promote

**Create feedback loops** by conducting quarterly creator surveys, hosting focus groups for new campaign ideas, and establishing creator advisory panels that influence program decisions

**Leverage communities for market intelligence** by analyzing community discussions for trending topics, monitoring creator questions to identify product gaps, and gathering audience demographic insights from community interactions

03

### Optimize for dual outcomes:

*Track both performance and brand metrics* to demonstrate creator ROI across the funnel

*Design campaigns* that balance sales objectives with brand-building goals

04

### Capitalize on the video content opportunity:

*Invest in video-first creators* to bridge internal content gaps

*Deploy a platform-native video strategy* so your content is authentic and effective for each unique audience

*Use creator-specific promotional codes* to measure video ROI

05

### Address global market variations:

*Prioritize high-growth markets* like Singapore (37pp+) and the UK (26pp+) for creator investment

*Adapt strategies for markets* with lower adoption like France and Italy

*Test market-specific approaches* rather than one-size-fits-all creator strategies



05

**Bridge**

*the*

**[measurement  
gap]**

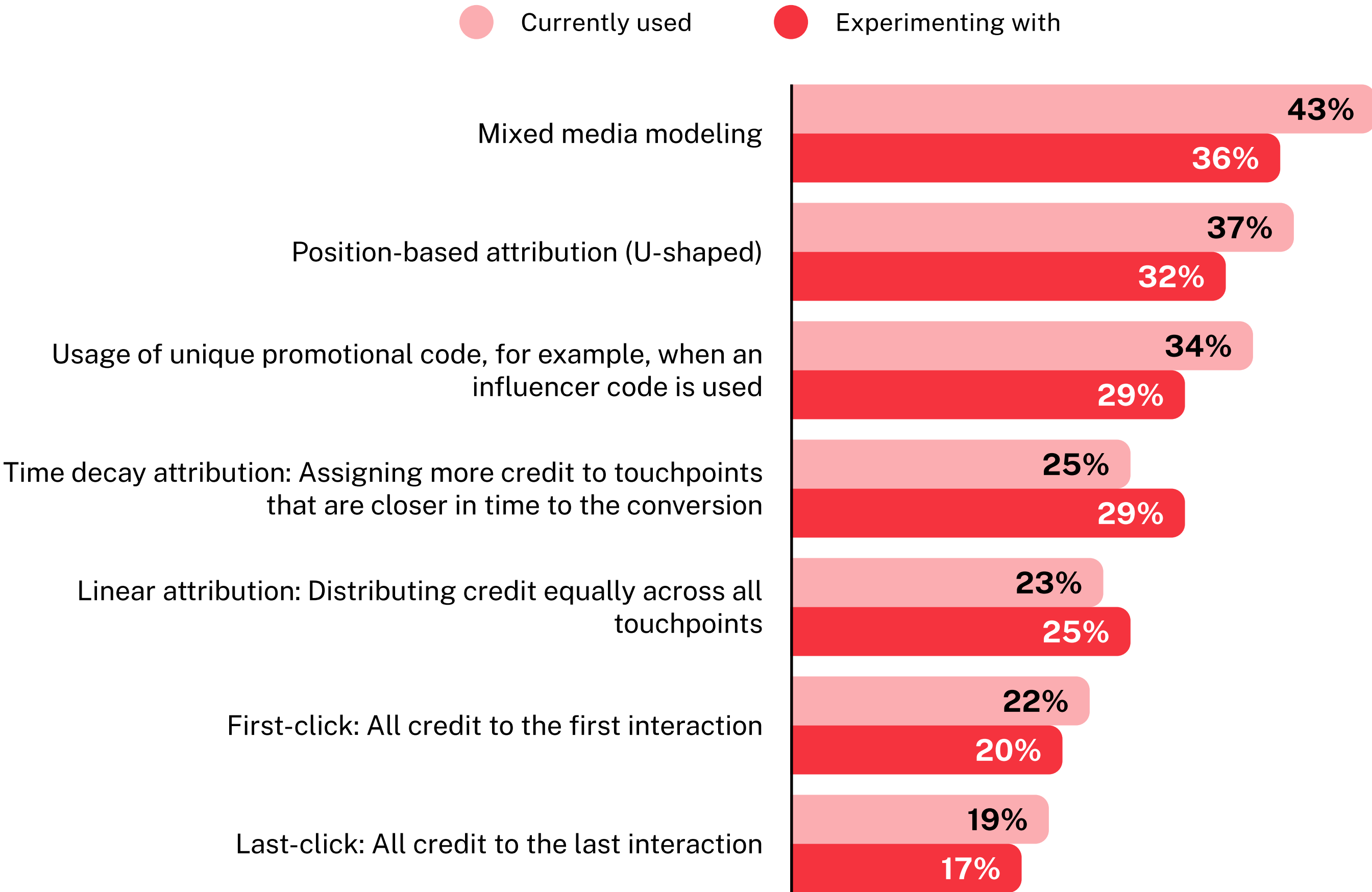
Bridge the measurement gap

Partnership measurement is experiencing an innovative evolution. A reported 94% of brands are experimenting or considering alternative attribution models in the next year, recognizing that sophisticated customer journeys require sophisticated measurement approaches. This industry-wide shift creates significant competitive advantages for brands that implement these changes thoughtfully.

Mixed media modeling (43%) and position-based attribution (37%) have become the new standards, replacing oversimplified single-touch models. First-click (22%) and last-click (19%) are now the least used attribution models, signaling a fundamental shift in how brands value partner contributions across the customer journey.

In the coming year, even more brands are planning to experiment with mixed media modeling (36%) and position-based sales attribution models (32%).

The shift in attribution models: What brands use vs. what they plan to test



Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).  
Question: Which sales attribution models does your company currently use in its affiliate programs? and What alternative sales attribution models are you considering or experimenting with for the coming year?  
Note: The "Experimenting With" bars exclude responses for "Not applicable," "I'm not sure," "Other," and "We are not considering alternative models."

## Attribution model preferences reveal new opportunities

The data reveals important partner perspective gaps that sophisticated brands can address. While brands invest in mixed media modeling (43%) and position-based attribution (37%), their partners have different measurement preferences that create relationship and performance opportunities.

Creator preferences show clear patterns: 32% prefer first-click attribution because they value recognition for sparking initial interest and building trust that drives customer journeys. Their preference aligns with their role as discovery and awareness partners

**Publisher preferences vary by business model:** Publishers favor attribution models that emphasize customer discovery and detailed customer journey analysis. First-click attribution (18%) and mixed media modeling (16%) are the most preferred overall. However, preferences vary significantly by publisher type. These differences are driven by each publisher's business model and role in the customer journey:

- **Network partners strongly prefer linear attribution (35%),** reflecting their role in facilitating touchpoints throughout the customer journey
- **Deals and coupon publishers favor unique promotional codes (26%) and last-click attribution (23%),** aligning with their final-step conversion focus
- **Content and review publishers prefer first-click (20%),** emphasizing their role in introducing customers to products

Publisher attribution model preferences by publisher type

Publisher Type	First-click	Last-click	Linear	Time decay	Mixed media modelling	Position-based	Usage of unique code
Commerce Solutions	22%	5%	24%	14%	11%	14%	5%
Deals and Coupons	14%	23%	6%	6%	17%	6%	26%
Search and Media Arbitrage	10%	3%	16%	13%	29%	13%	16%
Network	6%	18%	35%	18%	0%	12%	12%
Content and Reviews	20%	15%	15%	7%	14%	14%	15%
Loyalty and Rewards	18%	13%	5%	8%	23%	28%	5%
Cross-Audience Monetization	27%	13%	20%	7%	13%	0%	20%

Source: Publisher Survey (n=284), The State of Affiliate Marketing (2025).  
Question: Which attribution model do you prefer your contribution to be measured with?  
Note: 'Other' responses excluded.

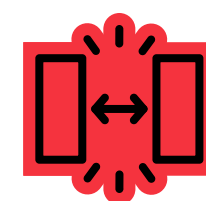


A reported 43% of publishers are neutral about attribution models or lack sufficient information to form opinions, which could stem from a lack of information or understanding of how brands measure success. This represents a major opportunity for brands willing to invest in measurement transparency and partner education.

### But here's where opportunity emerges:

The brands gaining the most from this evolution are those who successfully bridge advanced attribution models with partners' role in the customer journey and fundamental business KPIs to measure success. While most brands master complex customer journey analysis, only 20% measure Customer Acquisition Cost (CAC) metrics, and just 18% measure Average Order Value (AOV) metrics.

## The attribution model migration accelerates



### **The measurement gap undermines program success:**

Brands aren't tracking all the metrics that prove they're achieving their stated objectives.



**Leading brands recognize that measurement sophistication means more than just attribution complexity.** The most successful programs combine three elements: advanced attribution models that accurately reflect partner value, clear communication that partners understand and trust, and critical business metrics that prove profitability.



### **For increasing sales:**

Only 18% measure Average Order Value, despite AOV revealing consumer spending habits, which is fundamental in creating sales strategies.



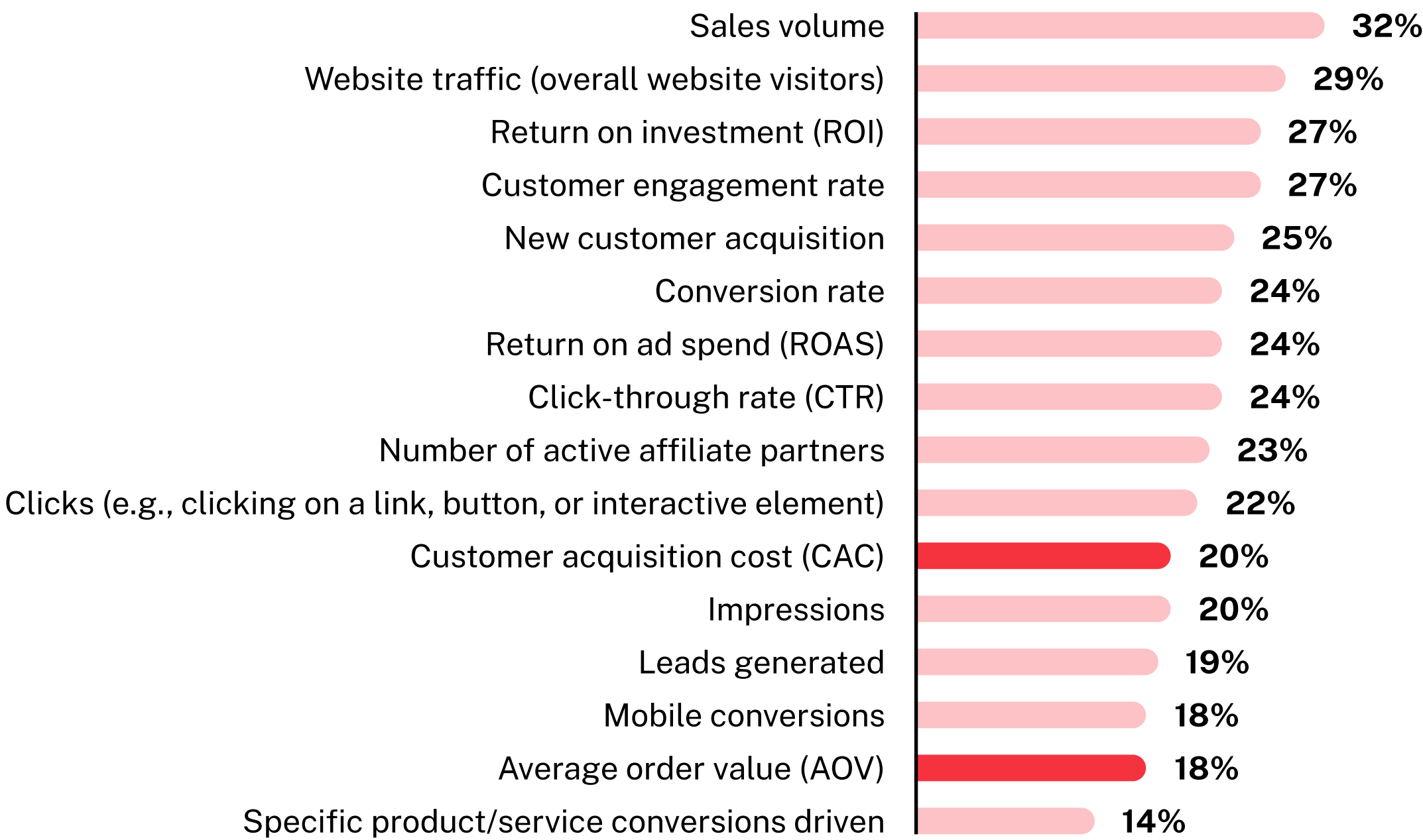
### **For cost-effective marketing:**

Only 20% track Customer Acquisition Cost, a critical metric for proving new customer acquisition and marketing efficiency.

# The business impact measurement opportunity

**Advanced attribution reveals customer journey insights, but fundamental business metrics prove profitability and program success.** Only 20% of brands track CAC and 18% measure AOV, creating a blind spot that limits program optimization. Overlooking these KPIs means willingly sacrificing the insights needed to achieve your two most critical goals: **driving sustainable sales and slashing marketing costs.**

Metrics used to measure affiliate program success



Source: Marketer Survey (n=818), The State of Affiliate Marketing (2025).  
**Question: What metrics does your company use to measure the success of its affiliate program? Select all that apply.**  
Note: 'Other' responses excluded.

Without tracking AOV and CAC, you're missing the full scope of your partners' impact

You can't tell the difference between a low-value transaction and a high-value customer, limiting your ability to optimize for profitable growth. To drive sustainable sales, you must increase how much current customers spend or acquire new customers. AOV reveals consumer spending habits, giving you a roadmap to deploying strategies that increase cart size.

Additionally, it's important to optimize marketing cost-effectiveness by reducing spend on partners who primarily convert existing customers. **Tracking CAC on a per-partner basis exposes who is truly successful in acquiring valuable new customers** at the right price, allowing you to reward partners who deliver real, incremental growth.

Ultimately, metrics like CAC and AOV are key to true program sophistication. They reveal not just what customers spend, but how and with whom. This is how you transform your affiliate program from a simple, volume-based channel into a value-driven growth engine.

**The profitability insight transforms partner evaluation:** A partner driving ten \$50 sales (\$500 total) appears productive in attribution reports, but they're less valuable than one driving five \$150 sales (\$750 total). Only AOV tracking reveals this crucial distinction, while CAC measurement shows which partners bring genuinely new customers vs those converting existing demand.




# Assess

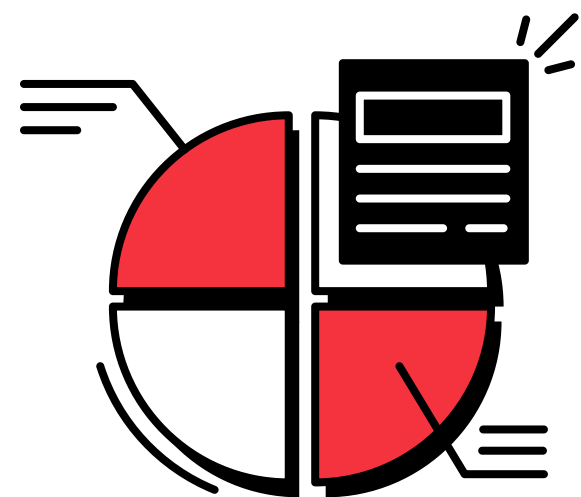
*your  
measurement  
approach*







## Assess your measurement approach



### Attribution strategy evaluation:

Are you among the 94% of brands exploring alternative attribution models? How well does your current approach balance sophisticated journey tracking with partner understanding and business impact measurement?



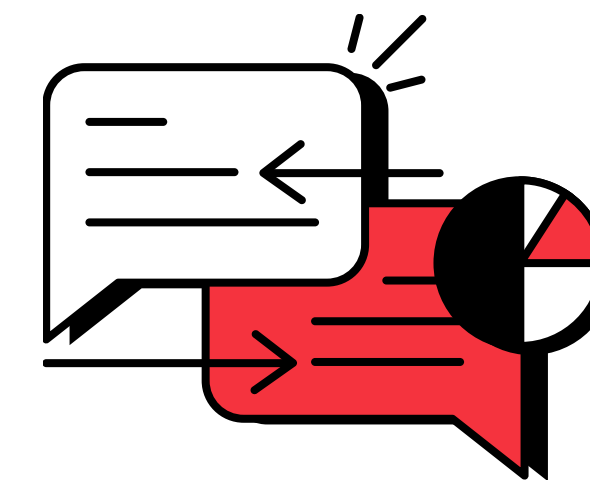
### Partner alignment check:

Are you adapting attribution models to match partner business models? Network partners prefer linear attribution (35%), while deal and coupon publishers favor unique promo codes (26%) and last-click (23%). Does your measurement approach reflect these preferences?



### Business impact tracking:

Do you track CAC and AOV by partner type? Without these fundamental metrics, even sophisticated attribution models miss the profitability insights that drive decisions and determine program success.



### Communication assessment:

Can your partners easily understand how their contributions are measured? The 43% publisher neutrality suggests a major competitive advantage for brands that excel at measurement education.

# Next steps

to

*optimize your  
measurement  
strategy*



## Next steps to optimize your measurement strategy

01

### *Survey* your partners first.

Before implementing new attribution models or measurement frameworks, survey your top partners about their current understanding and preferences. Use insights from publishers (43% are neutral/lack information) and creators (32% prefer first-click) as starting points, but gather specific feedback about your program's measurement approach from your partners.

02

### *Implement* multi-touch attribution systematically.

Move beyond single-touch models while choosing approaches that align with your partner's purpose in your customer journey and their business model

03

### *Bridge* the partner understanding gap.

*For publishers:* Focus on measurement transparency and education to convert the 43% who are neutral or lack information into engaged advocates

*For creators:* Emphasize simple, transparent attribution models that align with their preference for straightforward logic — 32% prefer first-click attribution because they value direct credit for driving initial customer interest

*Avoid one-size-fits-all measurement communication* - publishers may appreciate technical attribution discussions, while creators prefer clear, simple explanations of how they get credit



04

## *Layer* business metrics onto attribution data.

Start tracking CAC and AOV by partner type to achieve your core program goals: increasing sales and improving marketing cost-effectiveness. This shifts focus from conversion volume to profitable growth, and transforms attribution from journey mapping to strategic business optimization.

05

## *Create* attribution-based partner strategies.

Use insights like network partners preferring linear attribution (35%) while deal and coupons publishers favor unique promo codes (26%) and last-click (23%) — to design measurement approaches that align with partner preferences and their role in the customer journey (for example, is their purpose awareness, or driving conversion).

06

## *Layer* attribution-based partner strategies.

Start tracking CAC and AOV by partner type to achieve your core program goals, optimize partner mix, and identify which relationships drive sustainable competitive advantage

07

## *Develop* partner-specific measurement approaches.

Recognize that content publishers value discovery credit differently than coupon publishers. Then design measurement, communication, and compensation structures that reflect these preferences while maintaining program integrity.

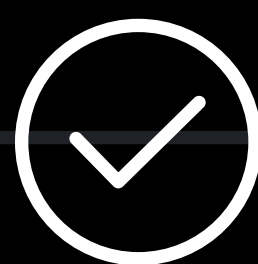
06

*Partnership sophistication assessment:*

# Strategic planning worksheet

Benchmark yourself:

# Identify your *growth* gaps



Use this tool in team planning sessions to identify gaps and set priorities



## Portfolio health check

- ☐ We work with 3-4+ different partner types
- ☐ We use 2-3 compensation models to drive results (not one-size-fits-all)
- ☐ Our partner mix covers all customer journey stages: Awareness → Consideration → Conversion → Retention
- ☐ We're investing in high-growth partner types (influencers +14pp, commerce solutions +12pp)
- ☐ We tailor our partner mix by market (Singapore +37pp projected creator growth, UK +26pp)

## Investment benchmark review

- ☐ We allocate 21-30% of marketing budget to partnerships (industry standard)
- ☐ Our team size matches program size benchmarks: 2-3 people (up to 50 partners), 4-5 people (up to 100 partners), 6+ members (500+ partners)
- ☐ We have the three critical skills needed for affiliate marketers: strategic thinking (39%), relationship management (37%), and platform expertise (35%)
- ☐ We generate 11-30% of company revenue from partnerships (like 74% of leading brands)

## Creator partnership sophistication

- ☐ We use tiered compensation by creator experience level
- ☐ We address the attribution preference gap (creators prefer first-click 32%)
- ☐ We treat creators as business partners with long-term relationships
- ☐ We offer creator communities (75% report increased loyalty)

## Technology enablement

- ☐ We use AI across 2-3+ applications (97% of brands do)
- ☐ We automate manual tasks: partner analysis, reporting, fraud detection
- ☐ We use predictive analytics for campaign optimization
- ☐ We empower partners with AI tools and resources

## Measurement alignment

- ☐ 94% of brands are experimenting with new models
- ☐ We track both CAC (only 20% do) AND AOV (only 18% do) by partner type
- ☐ Our partners understand how we measure their contributions
- ☐ We connect sophisticated attribution to fundamental business KPIs
- ☐ Our KPIs for program success are linked to our program goals (AOV + CAC can contribute to the top two goals-driving sales and more cost-effective marketing)

## Priority setting:

Biggest growth opportunity identified:

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Top 3 actions for next quarter:

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Team members who need to be involved:

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Budget/resources needed:

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07

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# What's next for partnership marketing



# What's next for partnership marketing

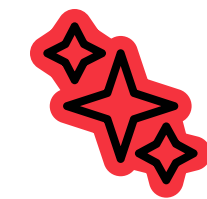
*Partnership marketing has reached an inflection point.*

The data reveals an industry in rapid transformation, where the brands implementing sophisticated partnership strategies today are positioning themselves to dominate tomorrow's competitive landscape.

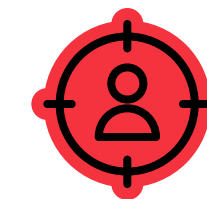
## The new reality: Sophistication becomes survival

**Within the next 12 months, the changes we've documented will accelerate dramatically.** 97% of brands have adopted AI. Privacy regulations are forcing permanent shifts in how partnerships are measured and managed. Video content and mobile-first experiences are reshaping how consumers discover and evaluate products.

The brands that adapt quickly will capture disproportionate advantages:



**AI-powered partnerships will become table stakes.** While 97% of brands use AI today, most deploy only 2-3 applications. The leaders will be those who integrate AI across their entire partner ecosystem — from recruitment to performance optimization to partner empowerment tools.



**Direct audience relationships will replace third-party dependencies.** As tracking becomes more challenging, the partnerships that own direct customer relationships (creators with engaged communities, publishers with email lists) will command premium valuations.

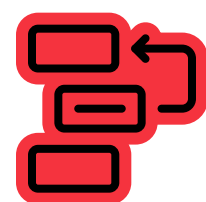


**Trust-based partnerships will outperform transactional ones.** With 26% of brands reporting “building trust and authenticity in affiliate promotions” as a top industry change, the partnerships built on genuine brand alignment and long-term value creation will deliver superior returns.

## Transform today's program into tomorrow's growth engine

The brands winning five years from now are the ones making intentional investments today. They're not just optimizing current performance — they're building the capabilities that will define future competitive advantage.

This means:



**Treating partnership sophistication as a top priority, not a tactical optimization.** The correlation between investment levels and revenue generation is no coincidence — it's predictive of future market position.



**Building partner relationships that will strengthen over time.** As AI makes content creation easier, the partnerships based on authentic relationships and shared value creation will become more valuable, not less.



**Implementing measurement approaches that connect partnership performance to business impact.** The brands that bridge sophisticated attribution with fundamental KPIs will justify increased investment while competitors fight for scraps.

## Your competitive advantage starts now

**The research is clear: partnership marketing is not just growing — it's evolving into the primary growth engine for forward-thinking brands.** The question isn't whether you'll eventually adopt these sophisticated approaches. The question is whether you'll implement them early enough to gain a competitive advantage or wait until they become necessary for survival.

**Use the five pillars assessment to identify your biggest opportunity areas.** Then move quickly. In a market where 75% of brands are expecting to increase partnership budget and AI is reshaping competitive dynamics every quarter, the brands that hesitate will find themselves competing for the partnerships and opportunities that leaders have already secured.

08

# Appendix



# Appendix A: Publisher types

Publisher Type	Definition
Commerce Solutions	Site-side shopping tools/services
Deals and Coupons	Aggregate/classify deals and promotions for consumer savings
Search and Media Arbitrage	Search engine, social, or programmatic marketers
Network	Broker access to brand campaigns and provide tracking, reporting, and payment services
Content and Reviews	Produce editorial content related to promoting, comparing, and listing products/services
Loyalty and Rewards	Incentivize transactions from consumers, employees, or businesses through a membership/benefits reward program
Cross-Audience Monetization	Brand-to-brand partnerships, complementary product offers

Appendix B: Global current affiliate partner type trends

Current global affiliate partner type trends.

**Survey questions:** What partners does your brand currently work with within its affiliate marketing program? Select all that apply

**Key:** **Blue:** Shows countries where usage exceeds the global by 5 percentage points **Red:** Shows countries where usage is below by global by 5 percentage points.

Country	Deals and Coupons	Search and Media Arbitrage	Network	Content and Reviews	Loyalty and Rewards	Cross-Audience Monetization	Social media influencers	Advocate/Referral partners	Email marketers	Mobile app partners	Charities/non-profit organizations	Strategic Brand Partners	Technology & Tool Integration partners	Lead generation partners
United States	42%	45%	38%	39%	41%	22%	39%	14%	34%	18%	16%	16%	22%	9%
Canada	39%	39%	43%	42%	50%	29%	38%	13%	31%	16%	16%	13%	21%	12%
Australia	54%	49%	41%	43%	48%	31%	40%	20%	40%	20%	9%	19%	15%	8%
Singapore	35%	48%	25%	32%	25%	25%	40%	20%	18%	30%	12%	30%	20%	8%
United Kingdom	30%	49%	31%	38%	38%	23%	46%	14%	29%	15%	8%	21%	23%	13%
France	37%	25%	35%	22%	39%	17%	26%	4%	21%	11%	13%	13%	18%	5%
Germany	33%	34%	34%	26%	29%	14%	37%	7%	21%	19%	7%	21%	16%	7%
Italy	28%	29%	36%	30%	30%	19%	16%	18%	21%	16%	9%	18%	14%	8%
Overall Total	37%	40%	36%	34%	38%	22%	36%	13%	28%	17%	11%	18%	19%	9%

Future global affiliate partner type trends

Survey questions:

Compared to your current affiliate program, which of the following partner types do you predict your brand will work with more frequently or dedicate more resources to in the future? Select all that apply

and Compared to your current affiliate program, which of the following partner types do you predict your brand will work with less frequently or dedicate fewer resources to in the future? Select all that apply.

Key:

**Blue:** Countries where usage exceeds the global trend by 5 percentage points

**Red:** Countries where usage is below the global trend by 5 percentage points

Note: Values represent the net change in percentage points (pp) for predicted future collaboration, calculated as (% of brands expecting to increase - % of brands expecting to decrease)

Country	Commerce Solutions	Deals and Coupons	Search and Media Arbitrage	Network	Content and Reviews	Loyalty and Rewards	Cross-Audience Monetization	Social Media Influencers	Advocate/Referral	Email Marketers	Mobile App Partners	Charities	Strategic B2B	Tech & Tool Integration	Lead Generation
United States	20	10	9	17	16	5	-2	16	-1	-2	0	-2	-1	-1	2
Canada	8	23	17	21	18	21	0	12	-8	-9	0	-4	-17	-5	-6
Australia	11	10	9	3	0	6	2	5	4	-5	-1	4	9	-1	1
Singapore	-7	-3	8	2	12	-2	17	37	10	-7	5	0	13	7	12
United Kingdom	19	12	18	14	8	13	8	26	-5	8	8	-2	9	13	1
France	17	9	0	13	6	14	-5	-2	4	0	-2	5	0	0	3
Germany	17	-4	11	7	9	17	-3	16	1	-2	-3	-2	8	-3	-5
Italy	-4	6	-1	6	1	-1	0	2	6	8	2	0	4	1	3
Overall Total	12	8	8	12	11	10	2	14	1	-1	2	1	2	0	-1



# Appendix C: Global creator compensation preferences

What is your preferred way of being compensated for brand collaborations?	Commissions	Flat fee	Hybrid (Flat fee + commission)	Product exchange/gifting
United States	35%	40%	18%	4%
Canada	45%	21%	21%	9%
Australia	22%	39%	22%	11%
Singapore	28%	18%	46%	4%
United Kingdom	28%	28%	36%	4%
France	39%	20%	25%	12%
Germany	26%	24%	34%	14%
Italy	31%	15%	25%	25%

Note: "I have no preference" responses excluded from this table

# Methodology

## Brands

- **Sample size:** 818 marketers surveyed
- **Participant profile:** Included marketers who manage, contribute to, or oversee their company's affiliate marketing programs.
- **Company size:** Spanned a wide range of business sizes, from small businesses with 1-10 employees to large enterprises with over 1,000 employees.
- **Affiliate program information:** Program sizes varied significantly, from fewer than 25 active partners driving traffic to programs with over 500 active partners.

## Publishers

- **Sample Size:** 284 publishers surveyed
- **Participant Profile:** Included those who manage, work on, or have visibility into their company's affiliate marketing programs.
- **Publisher size:** The respondents represented companies of all sizes, ranging from those with web audiences of less than 50,000 to those with web audiences of over 10 million.
- **Affiliate program information:** Their affiliate programs ranged from less than a year to over 10 years in duration, and program sizes varied from those with fewer than 25 active partners to those with more than 500 partners.
- **Note:** See [Appendix A](#) for how publishers were defined in the survey.

## Content creators

- **Sample size:** 421 content creators surveyed
- **Participant profile:** Survey participants were 18 years or older and self-identified as content creators, influencers, or key opinion leaders (KOLs). Respondents confirmed their active participation in social media by posting content, earning income through these platforms, and engaging in brand collaborations.
- **Creator size and experience:** The sample represented a diverse range of experience levels and audience sizes, with follower counts ranging from under 1,000 to over 1 million, and they pursued social media work either part-time or as a full-time profession.

# About



impact.com is the world's leading commerce partnership marketing platform, transforming the way businesses grow by enabling them to discover, manage, and scale partnerships across the entire customer journey.

From affiliates and influencers to content publishers, brand ambassadors, and customer advocates, impact.com empowers brands to drive trusted, performance-based growth through authentic relationships. Its award-winning products — Performance (affiliate), Creator (influencer), and Advocate (customer referral) — unify every type of partner into one integrated platform. As consumers increasingly rely on recommendations from people and communities they trust, impact.com helps brands show up where it matters most.

Today, over 4,500 global brands — including Walmart, Uber, Shopify, Lenovo, L'Oréal, and Fanatics — rely on impact.com to power more than 225,000 partnerships that deliver measurable business results.