



Ask, and You Shall Receive: AI Answers and the Fragility of Platform Co-Creation

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INTRODUCTION

Google Inc. was officially founded in 1998, and since then, Google Search has expanded from a search engine into one of the most powerful digital platform businesses in the world (Google, 2023). Much of this growth has been supported by digital advertising. In Alphabet's 2024 annual report, Google advertising remained the company's largest revenue source, generating US\$264.59 billion out of US\$350.02 billion in total revenue (Alphabet Inc., 2025). In 2000, Google launched AdWords, now known as Google Ads, and in 2003, Google introduced AdSense as a way for website publishers to display targeted AdWords advertisements and receive payment when users clicked on them (Google, 2003, 2025b). With the help of keywords and targeted advertising, searching users were able to find relevant websites, advertisers were able to reach their target audience, and website owners were able to generate advertising revenue to help sustain their presence within Google's platform ecosystem.

For more than two decades, as Google's algorithm became more complex and online advertising matured, search engines operated as multi-sided platforms linking users, advertisers, and content producers. In platform theory, a multi-sided platform creates value by connecting different groups of participants whose interactions become more valuable through network effects and ecosystem participation (Cusumano et al., 2019). In Google Search's traditional model, users received relevant links, advertisers purchased attention, and publishers accepted the platform's gatekeeping power because search visibility returned traffic, audience data, and monetization opportunities. This was never an equal bargain, but it was at least



a recognizable model of value co-creation: publishers supplied the informational raw material, search engines organized discovery, and users completed the loop through clicks.

Google's AI Overviews feature changes that bargain. Google describes AI Overviews as using a customized Gemini model to answer more complex questions directly within Search, while AI Mode extends this further by allowing users to ask follow-up questions and explore topics more conversationally (Google, 2024, 2025a). Content interactivity of this kind has been shown to drive purchase intention by deepening user engagement, suggesting that conversational search features may strengthen platform stickiness beyond simple information retrieval (Wismiarsi et al., 2024). When a platform summarizes the answer directly on the results page, the publisher is no longer merely complemented by the platform; it risks being partially substituted by it.

THE THREE-STAGE CYCLE

This shift is better understood as a three-stage cycle than as a single event, and tracing that cycle in more detail is where platform theory needs to be extended for the AI search context. In the first stage, intermediation, the search engine functions purely as a navigator: it indexes, ranks, and routes users toward publishers without altering the underlying content relationship. In the second stage, disintermediation, the user no longer needs to visit the publisher because the platform itself starts to answer the query (exactly what AI Overviews and AI Mode do when they synthesize a response from multiple sources and present it before any link appears). Conventional platform economics treats disintermediation mainly as a threat that originates with users or sellers who choose to transact directly, and recent formal modelling shows that this kind of leakage can actually raise platform value once it expands the user base and strengthens network effects (Christmann & Rösch, 2025). AI search inverts that logic. Here it is the platform itself that disintermediates the publisher, not the user bypassing the platform to avoid it. The platform does not lose its position in the transaction; it substitutes itself for one side of it. This inversion is what makes the third stage, reintermediation, structurally different from a simple return to the earlier equilibrium. The search engine reinserts itself between user and source, but now as an interpreter and synthesizer rather than a mere router, absorbing the organizing, verifying, and explaining functions that publishers used to perform into its own output, all while still depending on publisher content as the raw material for training and retrieval. This concentration of interpretive authority in a non-human, synthesized layer raises the broader question of whether AI-curated content can replicate the trust traditionally placed in human creators, a concern that parallels emerging research on trust in virtual influencers (Kembau et al., 2026). The old intermediary did not disappear. It became stronger, but in a way that concentrates interpretive authority and answer-generation on the platform side of the relationship, precisely where value once flowed toward the publisher. Framed this way, the intermediation-disintermediation-reintermediation cycle is not a neutral description of technological change. It names a specific governance failure mode: one in which the platform captures the complementor's traditional function without preserving the complementor's traditional compensation (the mechanism, rather than merely the outcome, that the remainder of this commentary addresses).

From a user-driven strategy perspective, the appeal is obvious. AI answers strengthen same-side network effects among users: the more useful the answers become, the more users rely on the platform for complex queries. They also strengthen data feedback loops: more usage provides more behavioral signals, which can improve personalization, ranking, and answer quality. On the advertiser side, the platform can preserve attention within its own interface for longer periods, increasing its ability to monetize user intent. In the short term, AI search appears to deepen platform power.



However, this model creates a serious ecosystem governance problem. A platform cannot sustainably extract value from complementors while weakening their incentive to produce the complements that make the platform useful. Publishers, expert forums, reviewers, and independent creators are not passive inputs. They are ecosystem participants. If AI search reduces referral traffic without providing adequate compensation, attribution, or audience relationship, then the platform shifts from value co-creation to value appropriation. Pew Research Center found that users who encountered an AI summary in Google Search clicked on traditional search result links in only 8% of visits, compared with 15% of visits without an AI summary (Pew Research Center, 2025). This pattern is not limited to a single dataset: a difference-in-differences analysis exploiting the staggered rollout of Google's AI Overviews found that exposure reduced daily referral traffic to matched Wikipedia articles by roughly 15%, with the largest declines concentrated in culture and lifestyle topics and smaller effects in STEM content, offering early causal evidence rather than mere correlation (Khosravi & Yoganarasimhan, 2026). Similarly, the Reuters Institute for the Study of Journalism reported that publishers are concerned that AI summaries and chatbot features may further reduce traffic flows to news websites and apps (Reuters Institute for the Study of Journalism, 2025). The danger is not only legal conflict, but ecosystem degradation: fewer high-quality producers, more low-cost content farms, and an overall thinner informational pool for the AI system to draw upon.

This risk of degradation has a second, related dimension that deserves equal attention: a decline not just in the quantity of content publishers produce, but in its quality and diversity. When generative search systems draw disproportionately on sources that are easy to summarize and semantically similar to one another, they can create pressure toward homogenized content. Paired comparisons of Google's conventional and generative search results show that AI-generated summaries systematically favor pages with higher predictability for the underlying language model and greater semantic similarity to other cited sources (Ma et al., 2025). As publishers learn this, the incentive shifts toward writing for the model rather than for the reader (flattening distinctive analysis into the kind of generic, easily extractable prose that answer engines prefer to cite). This dynamic is compounded by the emergence of generative engine optimization (GEO), a set of practices, some legitimate and some manipulative, aimed at influencing what large language model-based search systems retrieve, cite, and recommend; researchers have already documented techniques that exploit the limited contestability of answer-space rankings and the difficulty of auditing which sources actually shaped a given AI answer (Wen et al., 2025). The result is a market that risks rewarding content engineered for algorithmic legibility over content that reflects original reporting, primary research, or specialized expertise (precisely the kind of complementor investment a healthy ecosystem depends on). Left unaddressed, this could produce a self-reinforcing decline: as fewer publishers can justify investing in costly original work, AI systems increasingly train on and retrieve from a thinner, more homogeneous, and more manipulable pool of content, some of it explicitly optimized for citation rather than for accuracy or depth. Publishers themselves already describe this dynamic under the informal label of AI "slop," even as early data show signs of counter-adaptation, including a shift toward richer, harder-to-replicate content and a modest rise in editorial hiring at some large publishers (Zhao & Berman, 2025).

ECOSYSTEM GOVERNANCE AND CONTENT RISKS

This account of one-sided extraction, however, is not the only credible reading of the evidence, and a balanced commentary should weigh the competing interpretation before drawing conclusions. Zhao and Berman (2025) find that generative AI's net effect on publishers is genuinely mixed: while it can lower



consumer demand for original publisher pages and increase the incentive to produce low-effort content, it can also function as a referral channel and an information-discovery mechanism that expands the addressable audience for publisher content, and their data show new editorial and content-production job postings rising even as some traffic metrics decline. There is also reason to think AI-mediated search grows the overall pool of search activity rather than simply reallocating a fixed pool of clicks: users who might not have searched at all, or who would have abandoned a complex query, may now complete an information task through an AI answer, and some of the traffic that does reach publisher sites through AI citations reportedly converts at a higher rate than traditional organic search traffic, suggesting that AI referrals, though smaller in volume, can still be commercially meaningful. This aligns with findings from other heavily intermediated digital markets, where platform-mediated trust factors such as online reviews and brand trust significantly influence purchase intentions even when user traffic is filtered through a platform gatekeeper (Putra & Pangaribuan, 2025). Publishers are not purely passive in this shift, either: many have already begun adapting through paid subscriptions, membership models, direct licensing deals such as the News Corp–OpenAI partnership, and revenue-sharing arrangements with generative search providers (News Corp, 2024; Robison, 2024), while others respond by blocking AI crawlers outright and shifting toward content forms that are harder for large language models to replicate (Zhao & Berman, 2025). Finally, disintermediation of this kind can, in principle, open space for new categories of content creators optimized for citation and answer-engine visibility rather than for classic search ranking, a shift in who competes for attention rather than a simple destruction of value. None of this negates the ecosystem risks described above, but it does mean that AI search’s net effect on the content ecosystem remains an open empirical question rather than a settled one, and platform governance should be designed with that uncertainty in mind.

This creates the chicken-and-egg dilemma of the AI search era. Users want fast, synthesized answers, but those answers depend on a continuous supply of credible human-created content. Publishers want visibility and revenue, but their willingness to remain accessible declines if platforms capture the user relationship and leave them with declining traffic. The platform operator must therefore solve a new version of the launch problem: not how to attract content to the web, but how to keep content producers economically motivated when the platform no longer needs to send users away as often.

RECOMMENDATIONS

API strategy becomes central to this challenge. In mature platform ecosystems, APIs determine who can connect, what kind of data can be accessed, and how value is allowed to move across the system. AI search platforms need an equivalent governance layer for content access. Broader research on AI intermediaries suggests this challenge is not unique to search: platforms that host and distribute AI systems and their outputs face similar difficulty translating governance ambitions into enforceable technical practice, since licensing terms, access controls, and moderation policies must be operationalized at a scale and speed that outpaces most existing legal and organizational tools (Gorwa & Veale, 2024). This could include opt-in licensing systems, standardized machine-readable usage terms, citation analytics, compensation mechanisms, and clearer controls over whether content can be used for training, retrieval, summarization, or commercial answer generation. Emerging standards such as Really Simple Licensing already point in this direction by proposing machine-readable licensing terms for attribution, pay-per-crawl, and pay-per-inference compensation (RSL Collective, n.d.). Without these kinds of rules, content access risks becoming less of a mutually beneficial platform relationship and more of a one-sided extraction process.



The recommendation for platform operators is clear: AI search should continue to be governed as a multi-sided ecosystem, not merely optimized as a product feature. This means developing transparent attribution standards, sharing performance analytics with publishers, creating scalable licensing or revenue-sharing models, and making a clear distinction between content that is simply indexed and content that is actively used to generate commercial AI answers. Turning this recommendation into practice, however, requires answering three concrete questions that platform theory alone does not resolve: who pays, how much, and on what basis.

On who pays, the logical answer is the entity that monetizes the answer, not the user who consumes it. Google, OpenAI, Perplexity, and similar operators capture the commercial upside of AI-mediated search through advertising adjacent to answers, subscription tiers, or enterprise licensing, so the compensation obligation should sit with the platform rather than being passed on to searchers, consistent with how AdSense already routed advertiser payments to publishers rather than to users.

On how much and on what basis, at least three metering approaches are already emerging in practice and could be combined rather than treated as mutually exclusive. A pay-per-crawl model, of the kind the RSL Collective's machine-readable licensing terms describe, would charge a fee whenever a platform's crawler accesses content, regardless of whether that specific page is later cited (RSL Collective, n.d.). A pay-per-citation or attribution-based model would instead tie payment to actual use: a fee triggered each time a specific source materially contributes to a generated answer, verified through citation analytics the platform would need to expose to publishers as a matter of course. A pay-per-inference model, closer to how API providers already bill for token usage, would scale compensation to the volume of AI-generated answers that draw on a publisher's content, which more directly reflects the economic value AI search extracts, but requires the platform to disclose retrieval and usage logs that are currently opaque even to the publishers whose content is being used. Because user engagement with an AI answer (how long it is read, whether it fully substitutes for a click) is difficult to observe from outside the platform, any credible revenue-sharing formula will likely need to combine a metered fee (crawl or inference volume) with an engagement-weighted supplement, similar to how streaming services blend flat licensing with usage-based royalty pools, and will need independent auditing to be trusted by publishers who currently have no way to verify a platform's own usage claims.

Existing industry moves already show that some version of this is negotiable in practice. For example, OpenAI and News Corp signed a multi-year agreement allowing OpenAI to display News Corp content in response to user questions, while Perplexity has experimented with publisher revenue-sharing models funded from its own advertising revenue (News Corp, 2024; Robison, 2024). These mechanisms should not be seen as acts of charity toward publishers. They are investments in the long-term health of the ecosystem that allows AI search to function in the first place.

CONCLUSION

For publishers and content producers, the answer also cannot simply be to reject AI platforms entirely. Total withdrawal may protect content in the short term, but it also risks invisibility in a digital environment increasingly shaped by answer engines rather than traditional search pages. Instead, publishers should strengthen their direct audience relationships, build proprietary data and membership models, and negotiate collectively where possible so that participation in AI systems happens on clearer commercial terms. In other words, they must move beyond being passive pages waiting to be discovered, and reposition themselves as strategic complementors whose content has measurable value inside the platform ecosystem.



The central lesson is that network effects may create dominance, but ecosystem governance determines durability. AI search platforms may win user attention by reducing friction and answering questions more quickly, but they may also weaken their own foundations if they destroy the economic incentives of the content ecosystem beneath them, a risk that persists even under the more optimistic readings of the traffic evidence considered above. A platform that answers everything while sustaining nothing is not an intelligent ecosystem. It is a harvest machine. The next competitive advantage in AI search will not belong only to the company with the strongest model or the fastest answers, but to the company that can design the fairest and most durable system of value co-creation.

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