

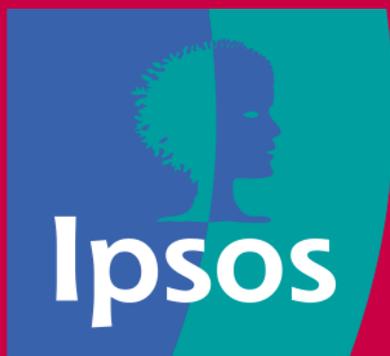
# Ipsos Iris passive monitoring data analysis

November 2022

Data provider:



UK Online  
Measurement

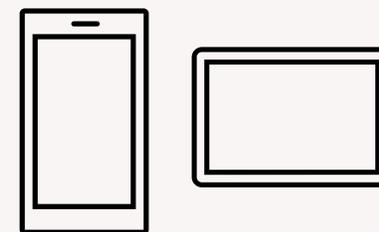
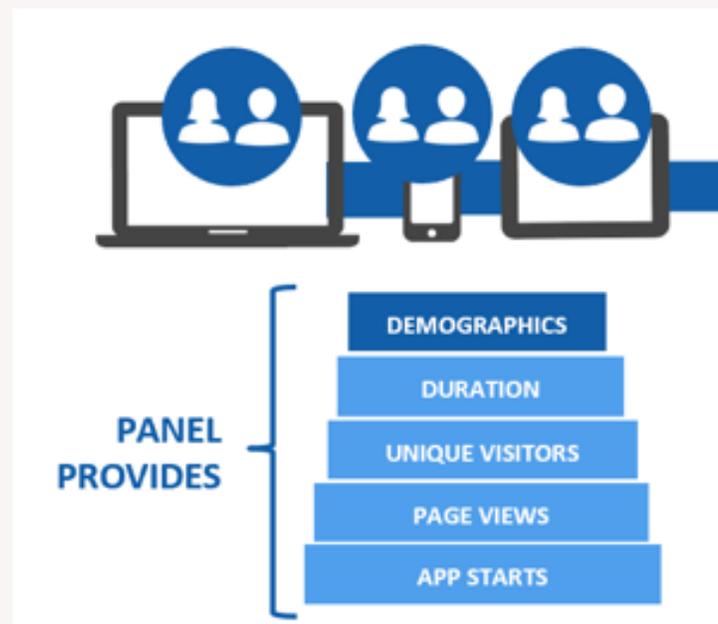


Ipsos iris – industry  
standard

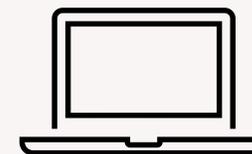
Passive monitoring is the automated collection of actual user data

## Method

Panel: 10,000+ UK nationally  
representative panellists aged 15+

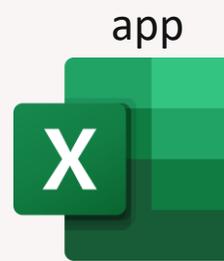
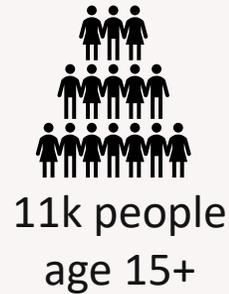
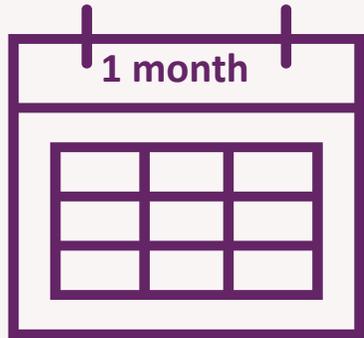


Measured using  
a passive app  
meter on phones  
and tablets using  
iOS or Android



And browser  
extension meter on  
Desktop and Laptop  
devices

# Ipsos iris data - output



These types of information are collated, each line is called an “event record”.

An illustrative example of the data is shown in the table below.

| User id | Site             | Site type    | Session start   | Session end     | Duration    | Device | Demographic information                                                                         |
|---------|------------------|--------------|-----------------|-----------------|-------------|--------|-------------------------------------------------------------------------------------------------|
| 0001    | www.facebook.com | Social media | 09/09/2022 9:00 | 09/09/2022 9:10 | 300 seconds | Mobile | Male, 45-54, white, DE, North West, 2 people in HH, children in HH, income: <£10,000            |
| 0001    | www.bbc.co.uk    | News         | 09/09/2022 9:05 | 09/09/2022 9:15 | 600 seconds | Mobile | Male, 45-54, white, DE, North West, 2 people in HH, children in HH, income: <£10,000            |
| 002     | www.youtube.com  | VSP          | 09/09/2022 9:17 | 09/09/2022 9:27 | 600 seconds | Tablet | Female, 18-24, Asian, AB, Scotland, 3 people in HH, no children in HH, income £20,000 - £30,000 |

# Ofcom categories

(the category *Other websites/apps which may contain news* is not included as news in this analysis – this removes about 1500 sources from the online news activity category)

|                       | Ofcom category                             | Websites/apps                                                                                                                                         |
|-----------------------|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Online news activity  | Newspapers                                 | Major newspapers and local newspapers; Ipsos category - Newspaper                                                                                     |
|                       | TV and Radio                               | Sources named in the Television and Radio category of Ofcom's News Consumption Survey                                                                 |
|                       | Magazines                                  | Sources named in the Magazines category of Ofcom's News Consumption Survey                                                                            |
|                       | Other news                                 | Huffington Post, Yahoo, MSN, AOL, BuzzFeed, Vice, The LAD Bible, Joe.co.uk                                                                            |
| Other online activity | Other websites/apps which may contain news | Everything else that Ipsos had categorised as news that does not fall into Newspapers, TV and Radio, Magazines, or Other news                         |
|                       | Aggregators                                | Google News app, Newzit, Flipboard app, News Now, Apple news app, Samsung news app / Upday                                                            |
|                       | Social Media                               | Facebook, Instagram, LinkedIn, Reddit, Snapchat, Tumblr, Twitter, Viber, WhatsApp, TikTok, YouTube, Twitch                                            |
|                       | Search Engines                             | Google (General search Engine), Bing, DuckDuckGo, Microsoft Edge, Safari, Wikipedia, Yahoo, Yandex.ru, Metager.de, Ecosia, Firefox, Internet explorer |
|                       | Other websites/ apps                       | Everything else not in the above Ofcom categories                                                                                                     |

# Contents

## Online news consumption

- Average time spent per day on news sites/apps
- Average number of news sites/apps visited daily
- Average daily proportion of online time spent on news sites/apps
- Top 20 news sites/apps visited

## Online Intermediary consumption

- Average time spent per day on social media sites/apps, search engines, aggregators
- Average number of daily visits to social media sites/apps, search engines, aggregators
- Average daily proportion of online time spent on online intermediaries, social media sites, search engines, aggregators
- Top 20 sites/apps visited: online intermediaries, social media sites, search engines, \*aggregators

## Referrals

- Sites visited following a visit to an online intermediary (aggregator, search engine or social media site)
- Assess the impact of access mode on concentration among news publishers

\* Top 10 sites for aggregators

# Summary of key online consumption measures

|                                               | News websites           | Online Intermediaries (total) | Social Media         | Search engines                       | Aggregators**           |
|-----------------------------------------------|-------------------------|-------------------------------|----------------------|--------------------------------------|-------------------------|
| Average time spent per day                    | 10 minutes              | 1 hour 19 minutes             | 1 hour 11 minutes    | 7 minutes                            | 1 minute                |
| Average daily proportion of online time spent | 5.1%                    | 35.0%                         | 30.7%                | 3.8%                                 | 0.66%                   |
| Average number of visits per day              | 13 visits per day       | -                             | 75 visits per day    | 22 visits per day                    | 1 visit per day         |
| Average number of unique sites/apps visited   | 1 unique site/app       | -                             | 3 unique site/app    | 1 unique site/app                    | ** unique visits        |
| Top 5 /Proportion of total online time        | bbc.co.uk/0.51%         | Facebook (App)/9.4%           | Facebook (App)/9.4%  | google.com/2.3%                      | Apple News (App)/0.28%  |
|                                               | BBC News (App)/0.48%    | Youtube (App)/4.4%            | Youtube (App)/4.4%   | yahoo.com/0.20%                      | Google News (App)/0.08% |
|                                               | BBC Sounds (App)/0.35%  | Whatsapp (App)/3.5%           | Whatsapp (App)/3.5%  | wikipedia.org/0.13%                  | Upday (App)/0.02%       |
|                                               | BBC iPlayer (App)/0.32% | Instagram (App)/2.4%          | Instagram (App)/2.4% | bing.com/0.09%                       | newzit.com/0.01%        |
|                                               | MailOnline (App)/0.22%  | google.com/2.3%               | TikTok (App)/2.2%    | Ecosia – Trees & Privacy (App)/0.06% | Flipboard (App)/0.01%   |

\*\* News aggregators such as Apple News and Samsung Upday are accessible only on specific phone brands. The average number of unique aggregators used across all users is therefore omitted.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

# Time spent on news sites/apps online

The (mean) average amount of time spent on news sites/apps each day is 10.32 minutes. There is a long tail of higher use - the upper boundary (in the 90<sup>th</sup> percentile excluding extreme outliers) is 27.73 minutes per day, more than twice the mean. This equates to 5.1% of total online time per day (15% among the higher 90<sup>th</sup> percentile), as shown in the table on the right. The median proportion of time spent on news each day is 1.4%.

## Average daily time spent on news in minutes

| Distribution of average daily time spent on news (min) |        |
|--------------------------------------------------------|--------|
| Number of panellists                                   | 11077  |
| Average time spent on news per day                     | 10.32  |
| min                                                    | 0.00   |
| 10%                                                    | 0.02   |
| 20%                                                    | 0.16   |
| 25%                                                    | 0.27   |
| 50%                                                    | 2.12   |
| 75%                                                    | 10.02  |
| 80%                                                    | 13.60  |
| 90%                                                    | 27.73  |
| max                                                    | 776.07 |

## Average daily proportion of online time spent on news

| Distribution of average daily proportion of online time which is spent on news |       |
|--------------------------------------------------------------------------------|-------|
| Number of panellists                                                           | 11077 |
| Average proportion of online time spent on news per day                        | 5.1%  |
| min                                                                            | 0%    |
| 10%                                                                            | 0%    |
| 20%                                                                            | 0.1%  |
| 25%                                                                            | 0.2%  |
| 50%                                                                            | 1.4%  |
| 75%                                                                            | 6.0%  |
| 80%                                                                            | 7.8%  |
| 90%                                                                            | 15.0% |
| max                                                                            | 100%  |

# News websites/apps: Proportion of total online time

The top 20 news websites and apps make up 3.33% of total time spent online.

Proportion of total online time spent on top 20 news sources

|    | News source                    | Entity type | Proportion of total online time |
|----|--------------------------------|-------------|---------------------------------|
| 1  | bbc.co.uk                      | Website     | 0.51%                           |
| 2  | BBC News                       | App         | 0.48%                           |
| 3  | BBC Sounds                     | App         | 0.35%                           |
| 4  | BBC iPlayer                    | App         | 0.32%                           |
| 5  | MailOnline                     | App         | 0.22%                           |
| 6  | All4                           | App         | 0.20%                           |
| 7  | The Guardian                   | App         | 0.16%                           |
| 8  | Sky Go                         | App         | 0.13%                           |
| 9  | Sky News                       | App         | 0.11%                           |
| 10 | BBC Sport                      | App         | 0.11%                           |
| 11 | ITV Hub                        | App         | 0.11%                           |
| 12 | BBC Weather                    | App         | 0.10%                           |
| 13 | dailymail.co.uk                | Website     | 0.10%                           |
| 14 | theguardian.com                | Website     | 0.09%                           |
| 15 | The Times and The Sunday Times | App         | 0.08%                           |
| 16 | msn.com                        | Website     | 0.07%                           |
| 17 | AOL - News, Mail & Video       | App         | 0.06%                           |
| 18 | channel4.com                   | Website     | 0.05%                           |
| 19 | The Telegraph UK               | App         | 0.04%                           |
| 20 | thesun.co.uk                   | Website     | 0.04%                           |

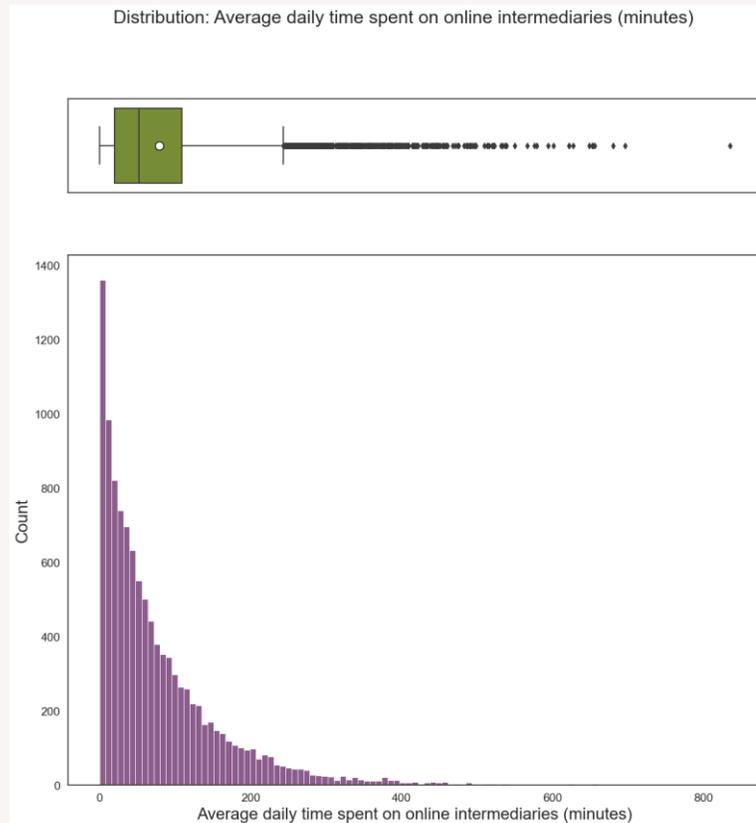


The BBC websites and apps in the top 20 of news sources by proportion of online time make up 1.87% of total time spent online

Note: Some of the sources here are included as news as they have been cited as news sources by respondents to Ofcom's News Consumption survey, such as BBC News, BBC Sounds, BBC iPlayer, All4, Sky Go and ITV Hub. It is not possible to distinguish news specific content from these sources within the data, so time spent on news from these sources will be overstated.

# Average daily time spent on Online Intermediaries

The (mean) average amount of time spent on **Online Intermediaries (OIs)** each day is 1 hour 19 minutes (78.9 minutes), as the table on the left shows. There is a long tail of higher use - the upper boundary (in the 90<sup>th</sup> percentile excluding extreme outliers) is 3 hours 7 minutes per day, more than twice the mean. This equates to an average (mean) of 35% of total online time per day (66% among the higher 90<sup>th</sup> percentile), as shown on the table on the right. The median proportion of online time spent on Online Intermediaries each day is 32%.



|                                   | Distribution of average daily time spent on online intermediaries (minutes) |
|-----------------------------------|-----------------------------------------------------------------------------|
| Number of panellists              | 11077                                                                       |
| Average time spent on OIs per day | 78.90                                                                       |
| min                               | 0.00                                                                        |
| 10%                               | 6.11                                                                        |
| 20%                               | 14.75                                                                       |
| 25%                               | 19.88                                                                       |
| 50%                               | 52.08                                                                       |
| 75%                               | 109.29                                                                      |
| 80%                               | 127.83                                                                      |
| 90%                               | 187.43                                                                      |
| max                               | 834.80                                                                      |

|                                                        | Distribution of average daily proportion of online time which is spent on online intermediaries |
|--------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| Number of panellists                                   | 11077                                                                                           |
| Average proportion of online time spent on OIs per day | 35%                                                                                             |
| min                                                    | 0%                                                                                              |
| 10%                                                    | 9%                                                                                              |
| 20%                                                    | 15%                                                                                             |
| 25%                                                    | 18%                                                                                             |
| 50%                                                    | 32%                                                                                             |
| 75%                                                    | 50%                                                                                             |
| 80%                                                    | 55%                                                                                             |
| 90%                                                    | 66%                                                                                             |
| max                                                    | 100%                                                                                            |

Note: The mean daily time/mean daily proportion is calculated for each panellist, and the distributions are composed of those.

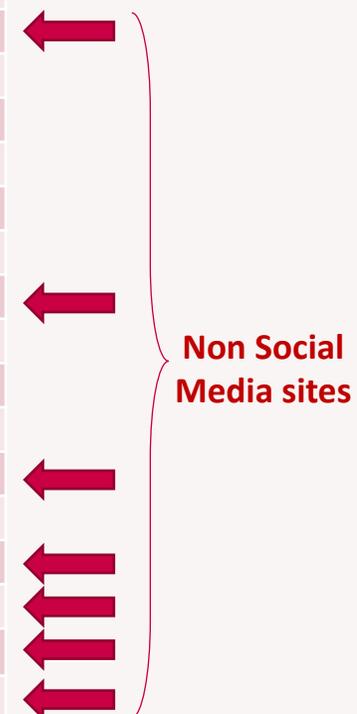
Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

# Proportion of total online time: Online Intermediaries

Social Media sites make up the largest proportion of time spent in **Online Intermediaries** with Facebook leading. google.com is the only search engine in the top 10 OIs. Apple News sits in 11<sup>th</sup> position accounting for 0.28% of total online time.

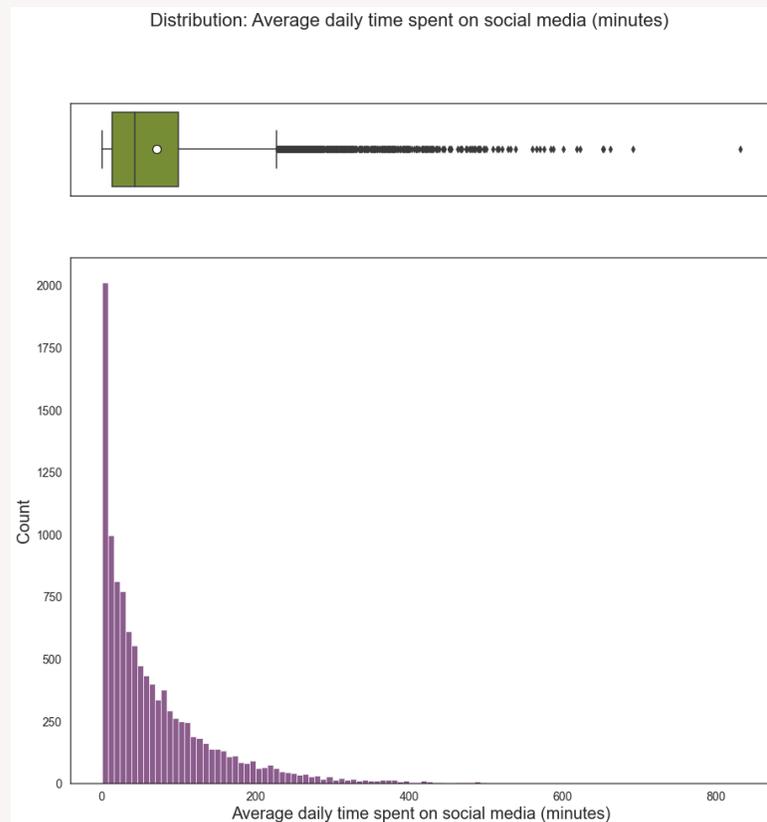
Proportion of total online time spent on top 20 OIs

|    | Online intermediary | Entity type | Proportion of total online time |
|----|---------------------|-------------|---------------------------------|
| 1  | Facebook            | App         | 9.44%                           |
| 2  | Youtube             | App         | 4.38%                           |
| 3  | Whatsapp            | App         | 3.51%                           |
| 4  | Instagram           | App         | 2.35%                           |
| 5  | google.com          | Website     | 2.29%                           |
| 6  | TikTok              | App         | 2.20%                           |
| 7  | Facebook Messenger  | App         | 1.66%                           |
| 8  | Twitter             | App         | 1.35%                           |
| 9  | Snapchat            | App         | 1.08%                           |
| 10 | facebook.com        | Website     | 0.82%                           |
| 11 | Apple News          | App         | 0.28%                           |
| 12 | Reddit              | App         | 0.26%                           |
| 13 | YouTube Kids        | App         | 0.23%                           |
| 14 | twitter.com         | Website     | 0.23%                           |
| 15 | yahoo.com           | Website     | 0.20%                           |
| 16 | LinkedIn            | App         | 0.19%                           |
| 17 | wikipedia.org       | Website     | 0.13%                           |
| 18 | bing.com            | Website     | 0.09%                           |
| 19 | Google News         | App         | 0.08%                           |
| 20 | Twitch              | App         | 0.07%                           |



# Average daily time spent on Social Media sites

The (mean) average amount of time spent on **Social Media sites** each day is 1 hour 11 minutes (70.76 minutes), as shown on the table on the left. The upper boundary (in the 90<sup>th</sup> percentile excluding extreme outliers) is 2 hours 55 minutes per day. This equates to an average (mean) of 31% of total online time per day (63% among the higher 90<sup>th</sup> percentile), as shown on the table on the right. The median proportion of online time spent on Social Media sites is 27%.



|                                            | Distribution of average daily time spent on Social Media (minutes) |
|--------------------------------------------|--------------------------------------------------------------------|
| Number of panellists                       | 11077                                                              |
| Average time spent on Social Media per day | 70.76                                                              |
| min                                        | 0.00                                                               |
| 10%                                        | 2.56                                                               |
| 20%                                        | 9.16                                                               |
| 25%                                        | 13.44                                                              |
| 50%                                        | 42.93                                                              |
| 75%                                        | 99.27                                                              |
| 80%                                        | 116.60                                                             |
| 90%                                        | 175.23                                                             |
| max                                        | 830.97                                                             |

|                                                                 | Distribution of average daily proportion of online time which is spent on Social Media |
|-----------------------------------------------------------------|----------------------------------------------------------------------------------------|
| Number of panellists                                            | 11077                                                                                  |
| Average proportion of online time spent on Social Media per day | 30.7%                                                                                  |
| min                                                             | 0%                                                                                     |
| 10%                                                             | 3.9%                                                                                   |
| 20%                                                             | 9.6%                                                                                   |
| 25%                                                             | 12.3%                                                                                  |
| 50%                                                             | 26.8%                                                                                  |
| 75%                                                             | 46.3%                                                                                  |
| 80%                                                             | 51.3%                                                                                  |
| 90%                                                             | 63.1%                                                                                  |
| max                                                             | 99.8%                                                                                  |

Note: The mean daily time/mean daily proportion is calculated for each panellist, and the distributions are composed of those.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

# Proportion of total online time: Social Media

Facebook leads when looking at time spent online on Social Media. Note – not all time spent on Social Media will be on news.

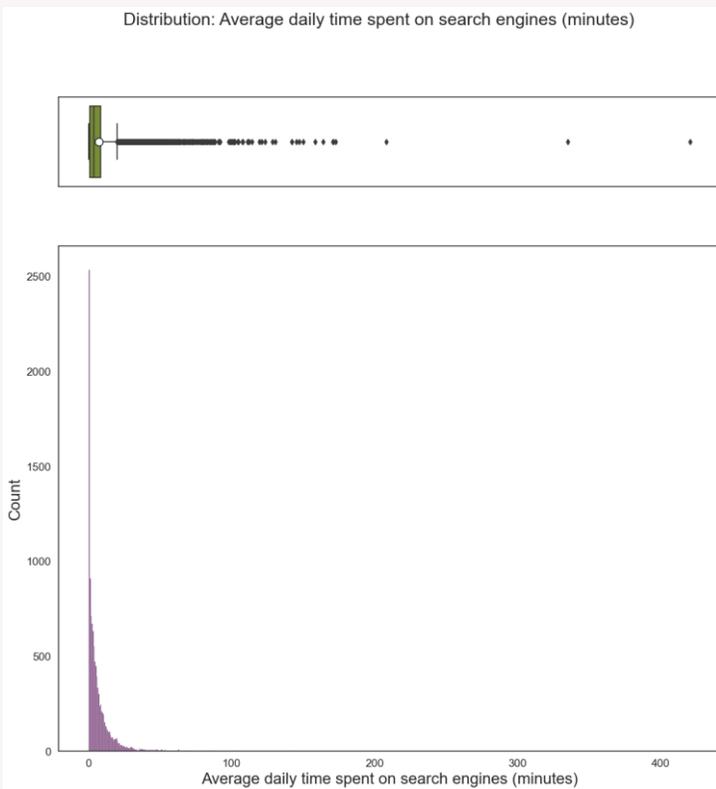
Proportion of total online time spent on top 20 Social Media sites

|    | Social media source | Entity type | Proportion of total online time |
|----|---------------------|-------------|---------------------------------|
| 1  | Facebook            | App         | 9.439%                          |
| 2  | Youtube             | App         | 4.377%                          |
| 3  | Whatsapp            | App         | 3.510%                          |
| 4  | Instagram           | App         | 2.354%                          |
| 5  | TikTok              | App         | 2.205%                          |
| 6  | Facebook Messenger  | App         | 1.655%                          |
| 7  | Twitter             | App         | 1.352%                          |
| 8  | Snapchat            | App         | 1.082%                          |
| 9  | facebook.com        | Website     | 0.819%                          |
| 10 | Reddit              | App         | 0.262%                          |
| 11 | YouTube Kids        | App         | 0.235%                          |
| 12 | twitter.com         | Website     | 0.232%                          |
| 13 | LinkedIn            | App         | 0.195%                          |
| 14 | Twitch              | App         | 0.069%                          |
| 15 | reddit.com          | Website     | 0.060%                          |
| 16 | instagram.com       | Website     | 0.057%                          |
| 17 | linkedin.com        | Website     | 0.046%                          |
| 18 | Viber Messenger     | App         | 0.017%                          |
| 19 | tumblr.com          | Website     | 0.012%                          |
| 20 | whatsapp.com        | Website     | 0.009%                          |

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

# Average daily time spent on Search Engines

The (mean) average amount of time spent on **Search Engines** each day is 7 minutes, as shown on the table on the left. The upper boundary (in the 90<sup>th</sup> percentile excluding extreme outliers) is 17 minutes per day. This equates to an average of 4% of total online time per day (9% among the higher 90<sup>th</sup> percentile), as shown on the table on the right. The median proportion of online time spent on Search Engines is 2%.



|                                                     | Distribution of average daily time spent on Search Engines (minutes) |
|-----------------------------------------------------|----------------------------------------------------------------------|
| <b>Number of panellists</b>                         | 11077                                                                |
| <b>Average time spent on Search Engines per day</b> | 7.11                                                                 |
| <b>min</b>                                          | 0.00                                                                 |
| <b>10%</b>                                          | 0.09                                                                 |
| <b>20%</b>                                          | 0.49                                                                 |
| <b>25%</b>                                          | 0.85                                                                 |
| <b>50%</b>                                          | 3.48                                                                 |
| <b>75%</b>                                          | 8.42                                                                 |
| <b>80%</b>                                          | 10.17                                                                |
| <b>90%</b>                                          | 16.53                                                                |
| <b>max</b>                                          | 420.59                                                               |

|                                                                          | Distribution of average daily proportion of online time which is spent on Search Engines |
|--------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| <b>Number of panellists</b>                                              | 11077                                                                                    |
| <b>Average proportion of online time spent on Search Engines per day</b> | 3.8%                                                                                     |
| <b>min</b>                                                               | 0%                                                                                       |
| <b>10%</b>                                                               | 0.1%                                                                                     |
| <b>20%</b>                                                               | 0.5%                                                                                     |
| <b>25%</b>                                                               | 0.7%                                                                                     |
| <b>50%</b>                                                               | 2.1%                                                                                     |
| <b>75%</b>                                                               | 4.6%                                                                                     |
| <b>80%</b>                                                               | 5.5%                                                                                     |
| <b>90%</b>                                                               | 8.7%                                                                                     |
| <b>max</b>                                                               | 100.0%                                                                                   |

Note: The mean daily time/mean daily proportion is calculated for each panellist, and the distributions are composed of those.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

# Proportion of total online time: Search engines

Google accounts for a far larger share of online time than any other search engine.

Proportion of total online time spent on top  
11 search engines

|    | Search engine            | Entity type | Proportion of total online time |
|----|--------------------------|-------------|---------------------------------|
| 1  | google.com               | Website     | 2.2940%                         |
| 2  | yahoo.com                | Website     | 0.1986%                         |
| 3  | wikipedia.org            | Website     | 0.1307%                         |
| 4  | bing.com                 | Website     | 0.0896%                         |
| 5  | Ecosia - Trees & Privacy | App         | 0.0592%                         |
| 6  | Wikipedia                | App         | 0.0182%                         |
| 7  | duckduckgo.com           | Website     | 0.0122%                         |
| 8  | ecosia.org               | Website     | 0.0060%                         |
| 9  | yandex.com               | Website     | 0.0034%                         |
| 10 | yandex.ru                | Website     | 0.0001%                         |
| 11 | firefox.com              | Website     | 0.0001%                         |

# Average daily time spent on Aggregators\*\*

|                                           | Distribution of average daily time spent on Aggregators (minutes) |
|-------------------------------------------|-------------------------------------------------------------------|
| Number of panellists                      | 11077                                                             |
| Average time spent on Aggregators per day | 1.04                                                              |
| min                                       | 0.00                                                              |
| 10%                                       | 0.00                                                              |
| 20%                                       | 0.00                                                              |
| 25%                                       | 0.00                                                              |
| 50%                                       | 0.00                                                              |
| 75%                                       | 0.17                                                              |
| 80%                                       | 0.32                                                              |
| 90%                                       | 1.67                                                              |
| max                                       | 157.82                                                            |

|                                                                | Distribution of average daily proportion of online time which is spent on Aggregators |
|----------------------------------------------------------------|---------------------------------------------------------------------------------------|
| Number of panellists                                           | 11077                                                                                 |
| Average proportion of online time spent on Aggregators per day | 0.66%                                                                                 |
| min                                                            | 0%                                                                                    |
| 10%                                                            | 0%                                                                                    |
| 20%                                                            | 0%                                                                                    |
| 25%                                                            | 0%                                                                                    |
| 50%                                                            | 0%                                                                                    |
| 75%                                                            | 0.09%                                                                                 |
| 80%                                                            | 0.20%                                                                                 |
| 90%                                                            | 0.97%                                                                                 |
| max                                                            | 85.47%                                                                                |

|    | Aggregator        | Entity type | Proportion of total online time. Top 10 sites |
|----|-------------------|-------------|-----------------------------------------------|
| 1  | Apple News        | App         | 0.2784%                                       |
| 2  | Google News       | App         | 0.0767%                                       |
| 3  | Upday for Samsung | App         | 0.0243%                                       |
| 4  | newzit.com        | Website     | 0.0118%                                       |
| 5  | Flipboard         | App         | 0.0106%                                       |
| 6  | newsnow.co.uk     | Website     | 0.0037%                                       |
| 7  | Upday News        | App         | 0.0034%                                       |
| 8  | Newzit            | App         | 0.0009%                                       |
| 9  | upday.com         | Website     | 0.0003%                                       |
| 10 | flipboard.com     | Website     | 0.0002%                                       |

\*\* News aggregators such as Apple News and Samsung Upday are accessible only on specific phone brands. The time spent on individual aggregators is averaged across the whole sample.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

# How people discover news online

# Objectives and approach



# Objectives, scope of analysis

Objectives:

- Identify how people navigate to news articles online ('access mode')
- Assess the impact of access mode on **market concentration** among news publishers
- Our approach is informed by article by Nielsen and Fletcher (2021)\*

Scope of analysis includes computer (desktop, laptop), tablet and smartphone traffic

Focusing on three **types of access mode**:

- A. Direct:** People navigate to the article from a homepage on the news outlet
- B. Online intermediary:** People navigate to the article from a search engine (e.g. Google, Bing), a news aggregator website or app (e.g. Google News, Apple News), or a social media website or app (e.g. Facebook, Twitter)
- C. Any other website or app** (e.g. from another newspaper, email, text or blog).

Focusing on traffic to 21 of the UK's most popular news outlets

- Same set of news outlets as the Nielsen and Fletcher (2021) study, to facilitate comparability
- Focusing on **news articles visited on websites**, as data on apps usage doesn't capture URLs, so cannot identify news articles viewed in apps

Sources of intermediated traffic include:

- Four **search providers** (Google, Bing, Yahoo, AOL)
- Two **news aggregators** (Google News, Apple News)
- Two **social media** services (Facebook, Twitter)

\* Nielsen, R. K. and Fletcher, R. (2021). Concentration of online news traffic and publishers' reliance on platform referrals: Evidence from passive tracking data in the UK. *Journal of Quantitative Description: Digital Media* 2(2022), 1–23. <https://doi.org/10.51685/jqd.2022.015>

# Methodology

As information on whether a person clicked on a hyperlink is not available in our data, we had to draw inferences about news article referrals from the chronology of website visits and apps usage, proceeding in the following principal steps:

- Identify relevant types of websites and apps: news outlets (within which: news outlet homepages, news articles), search providers, news aggregators, social media
- For each news article webpage visit, identify the most recent instance of visiting/using each relevant type of website or app by the same individual on the same device before visiting the news article
- Based on the distance in terms of time and/or number of steps (website visits, app use instances) infer the access mode through which the individual navigated to the news article – our central case is presented in detail on the next slide

No single way of drawing the inference is clearly superior to all others – we looked at different plausible combinations of rules – see results below for details

Some degree of ambiguity exists for each set of rules – we looked at different plausible ways of resolving this by including or excluding news articles where the access mode is most ambiguous – see results below for details

# Steps to identify news article access mode

| Step description                                                                                                            | Application scope |
|-----------------------------------------------------------------------------------------------------------------------------|-------------------|
| <b>Exclude article</b> from analysis if any article on the same outlet visited in the past:                                 | 1 step or 1 hour  |
| <b>Source = direct</b> if outlet homepage visited in the past:                                                              | 5 steps           |
| <b>Source = most recent intermediary</b> if visited in the past:                                                            | 5 steps*          |
| <b>Exclude article</b> from analysis if source not identified above and any article on the same outlet visited in the past: | 24 hours          |
| <b>Exclude article</b> from analysis if source not identified above and the same article visited in the past:               | Anytime           |
| <b>Source = other</b> if source not identified above                                                                        | Yes               |
| <i>* Social media apps only if visited in the last 5 minutes</i>                                                            |                   |

In our central case, we proceeded to identify the access mode for each news article as follows:

- We excluded news articles where the user visited any article on the same news outlet in the last step or in the past hour, as these could ambiguously be interpreted either as direct visit or visit driven by the source of the previous article visit
- Where the user visited the news outlet homepage in the last 5 steps before visiting the new article, we concluded that the article visit was referred from the outlet homepage
- Where the user did not visit the news outlet homepage in the last 5 steps but visited an intermediary website or used an intermediary app in those last 5 steps, we concluded that the article visit was referred from the intermediary website/app
- Where neither of the above applied, we excluded news articles where the user visited any article on the same news outlet in the past 24 hours or the same news article at any point in the past, as these could ambiguously be interpreted either as direct visit, visit driven by the source of the previous article visit or visit driven by another, more recently visited/used source
- We classified all remaining news article visits as referred from another source (other than the outlet homepage or intermediary)

Our results are summarized in the following section.

# Results overview



## Share of overall traffic to news article webpages by access mode

| Access mode                              | Share of traffic |
|------------------------------------------|------------------|
| Direct                                   | 48%              |
| All online intermediaries                | 29%              |
| -- Google Search (total website and app) | 17%              |
| -- Facebook (total website and app)      | 7%               |
| -- Twitter (total website and app)       | 3%               |
| Other                                    | 23%              |

Direct visits to news article webpages, identified as referrals from the news outlet's homepage or app, represent almost half of all news article visits.

About three in ten visits were referred by the online intermediaries specifically identified in our analysis, of which Google search represents more than a half.

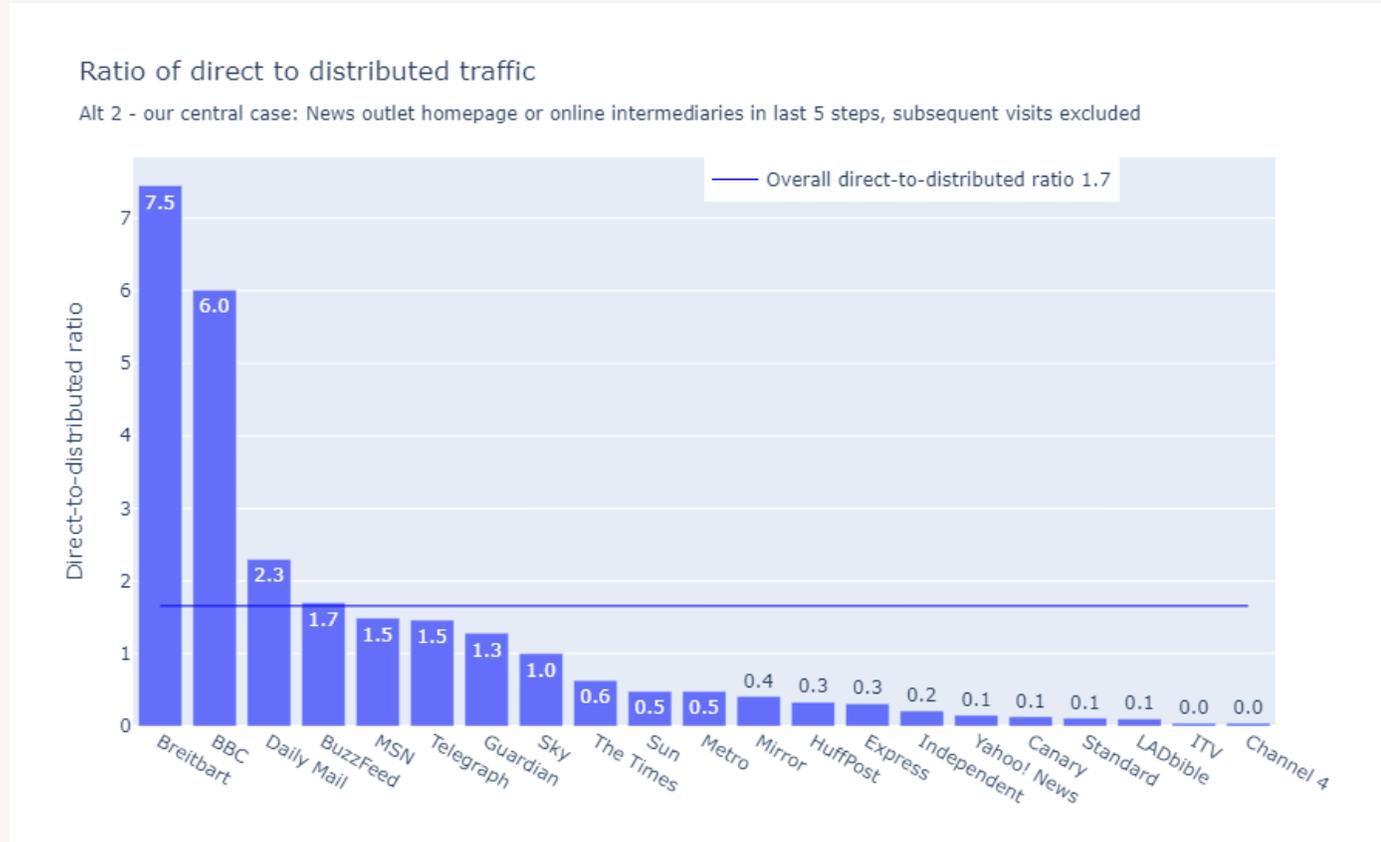
Less than a quarter of all visits was referred from another source different from the news outlet homepage or the specifically identified online intermediaries. These may be referrals from any other online intermediaries or shared via blogs, text, email, etc.

These results vary depending on the combination of rules used to identify the source of the news article webpage visit, although direct visits always represent the highest share of all news article visits and Google search remains by far the most important among the specifically identified online intermediaries – see next section for detailed results.

Note: Entities named in this analysis and their respective types are listed in a table at the end of this section.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

# Ratio of direct vs distributed traffic to news article webpages

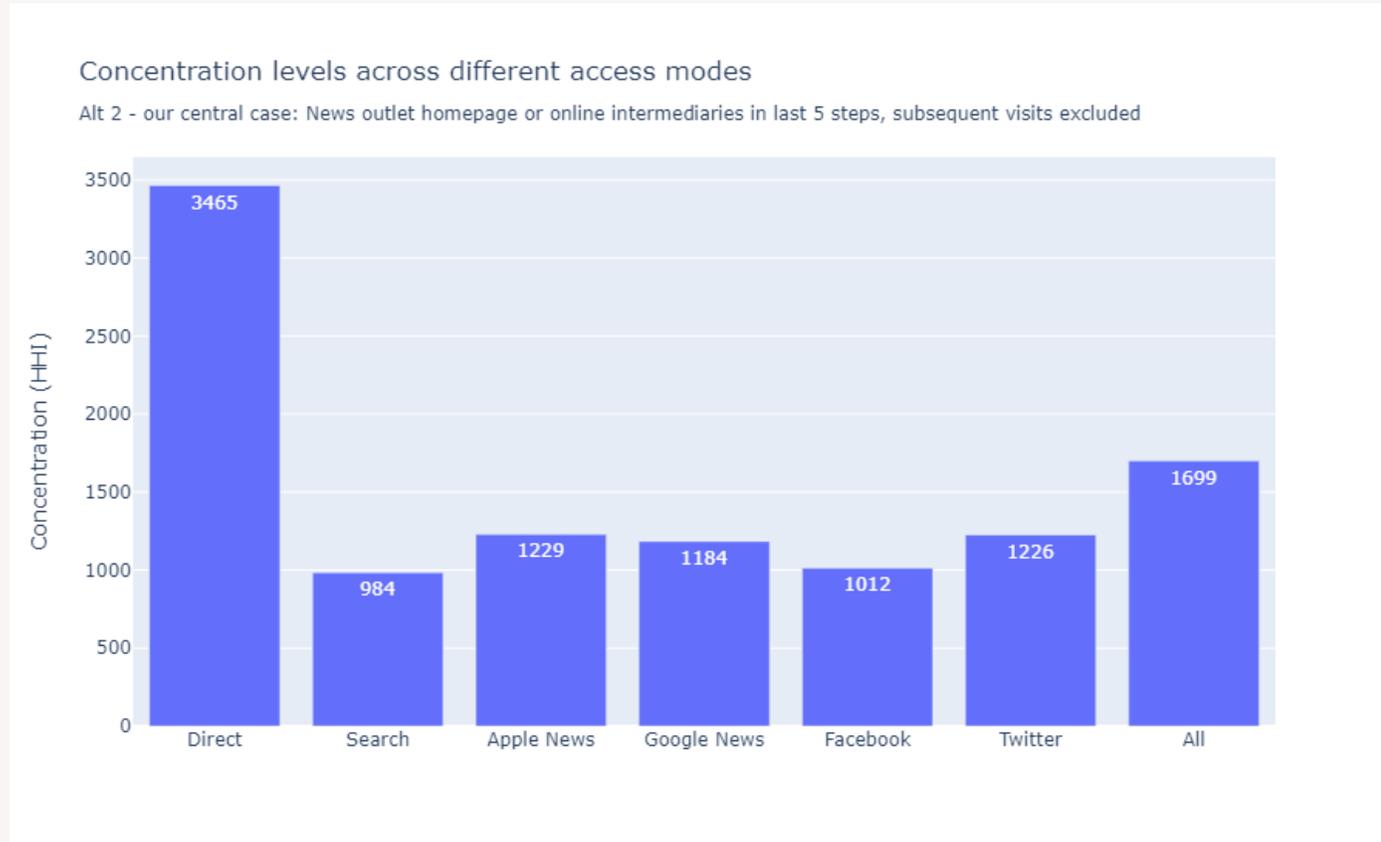


- The mix of direct article visits vs article visits referred by online intermediaries varies widely across different news outlets.
- Of the 21 specifically identified news outlets, 8 have a higher proportion of direct traffic while 13 have a higher proportion of traffic referred by the specifically identified intermediaries.
- This does not necessarily depend on the size of the news outlet.
- The overall average ratio of 1.7 is highly affected by the traffic volume of the BBC which is much greater than the other news outlets.
- The exact ratios vary depending on the combination of rules used to identify the source of news article traffic – see annex for details.

Note: Entities named in this analysis and their respective types are listed in a table at the end of this section.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

# Market concentration (HHI) by access mode



- Market concentration is higher for direct traffic than traffic referred by any of the other channels.
- Traffic referred from search tends to have the lowest concentration score, followed by traffic referred from Facebook.
- This overall pattern is consistent across the different combinations of rules used to identify the source of news article visits, although the exact scores vary – see annex for details.

Note: Entities named in this analysis and their respective types are listed in a table at the end of this section.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

# Conclusions and next steps



Direct traffic represents a greater proportion of news article visits than intermediated traffic



Market concentration is higher for direct traffic than any intermediated access mode, in line with the findings of Nielsen and Fletcher (2021)

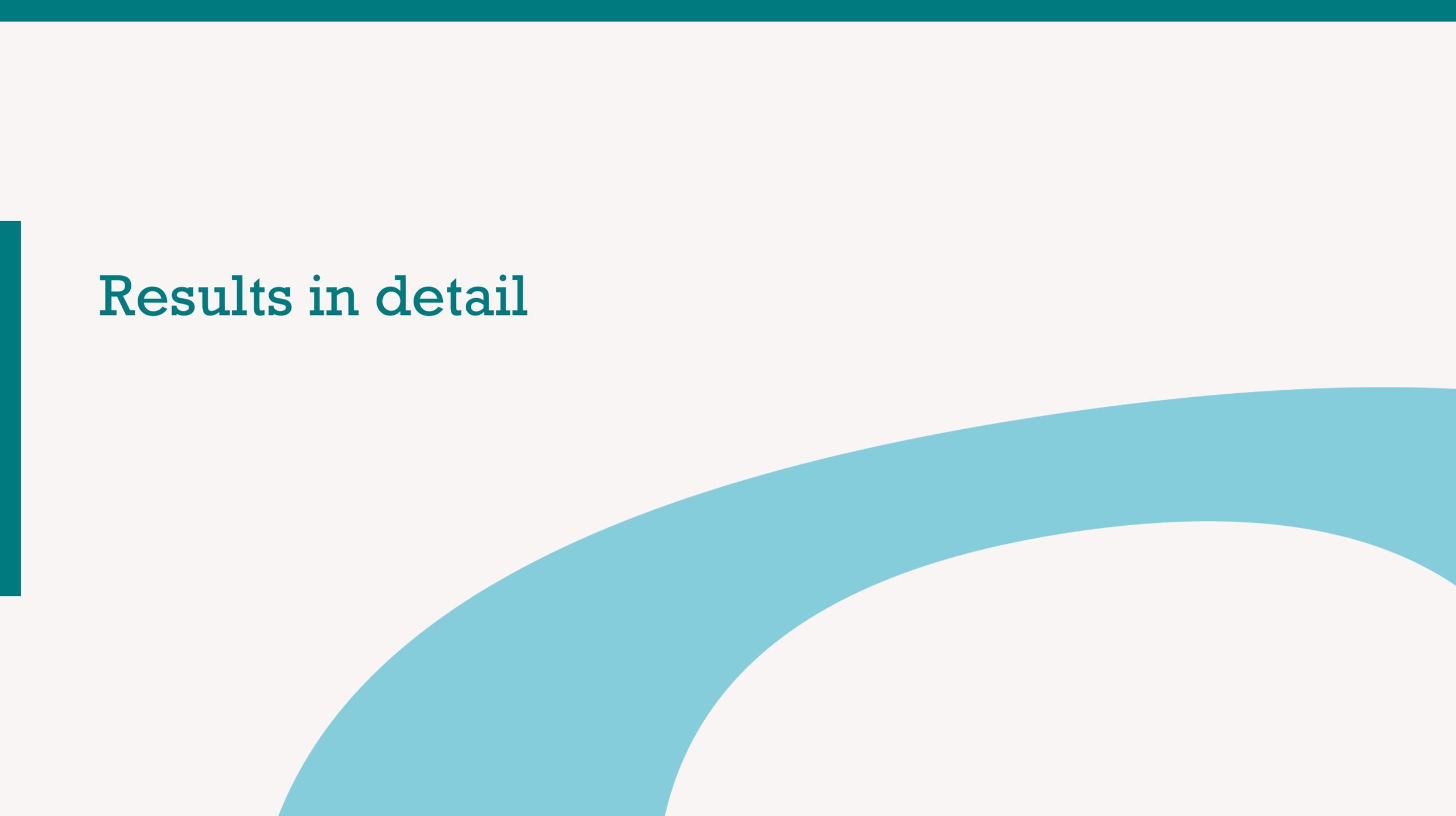


But this doesn't necessarily imply that individual users get a more diverse media consumption when going through intermediaries – this can be investigated as a next step



Results differ according to attribution approach for access modes to individual news articles – see detailed results below

# Results in detail



# Steps to identify news article visit source – alternatives

|                                                                                                                             | Nielsen & Fletcher approach | Alternative approach 1 | Alternative approach 2 – our central case | Alternative approach 3 |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------|------------------------|-------------------------------------------|------------------------|
| <b>Exclude article</b> from analysis if any article on the same outlet visited in the past:                                 | 1 step                      | 1 step or 1 hour       | 1 step or 1 hour                          | --                     |
| <b>Source = direct</b> if any article on the same outlet visited in the past:                                               | --                          | --                     | --                                        | 1 step                 |
| <b>Source = direct</b> if outlet homepage visited in the past:                                                              | 1 step                      | 5 steps                | 5 steps                                   | 5 steps                |
| <b>Source = most recent intermediary</b> if visited in the past:                                                            | 1 step                      | 1 step*                | 5 steps*                                  | 5 steps*               |
| <b>Exclude article</b> from analysis if source not identified above and any article on the same outlet visited in the past: | --                          | 24 hours               | 24 hours                                  | --                     |
| <b>Exclude article</b> from analysis if source not identified above and the same article visited in the past:               | --                          | Anytime                | Anytime                                   | Anytime                |
| <b>Source = other</b> if source not identified above                                                                        | Yes                         | Yes                    | Yes                                       | Yes                    |
| * Social media apps only if visited in the last 5 minutes                                                                   |                             |                        |                                           |                        |

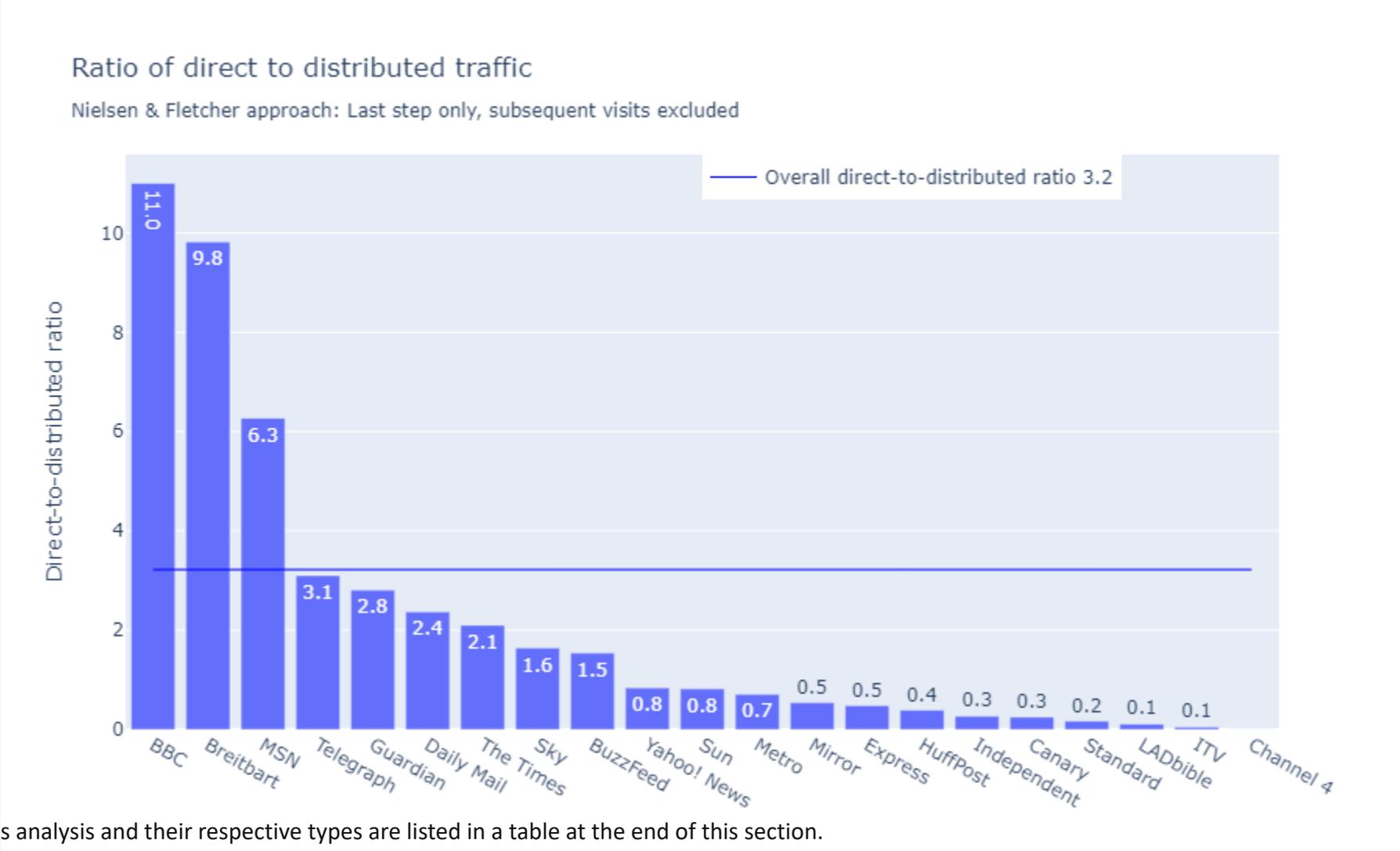
# Results: Share of overall traffic by news article visit source

|                                          | Nielsen & Fletcher approach | Alternative approach 1 | Alternative approach 2 – our central case | Alternative approach 3 |
|------------------------------------------|-----------------------------|------------------------|-------------------------------------------|------------------------|
| Direct                                   | 43%                         | 50%                    | 48%                                       | 67%                    |
| All intermediaries                       | 13%                         | 20%                    | 29%                                       | 14%                    |
| -- Google Search (total website and app) | 7%                          | 12%                    | 17%                                       | 8%                     |
| -- Facebook (total website and app)      | 4%                          | 5%                     | 7%                                        | 3%                     |
| -- Twitter (total website and app)       | 2%                          | 2%                     | 3%                                        | 1%                     |
| Other                                    | 43%                         | 31%                    | 23%                                       | 19%                    |

Note: Entities named in this analysis and their respective types are listed in a table at the end of this section.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

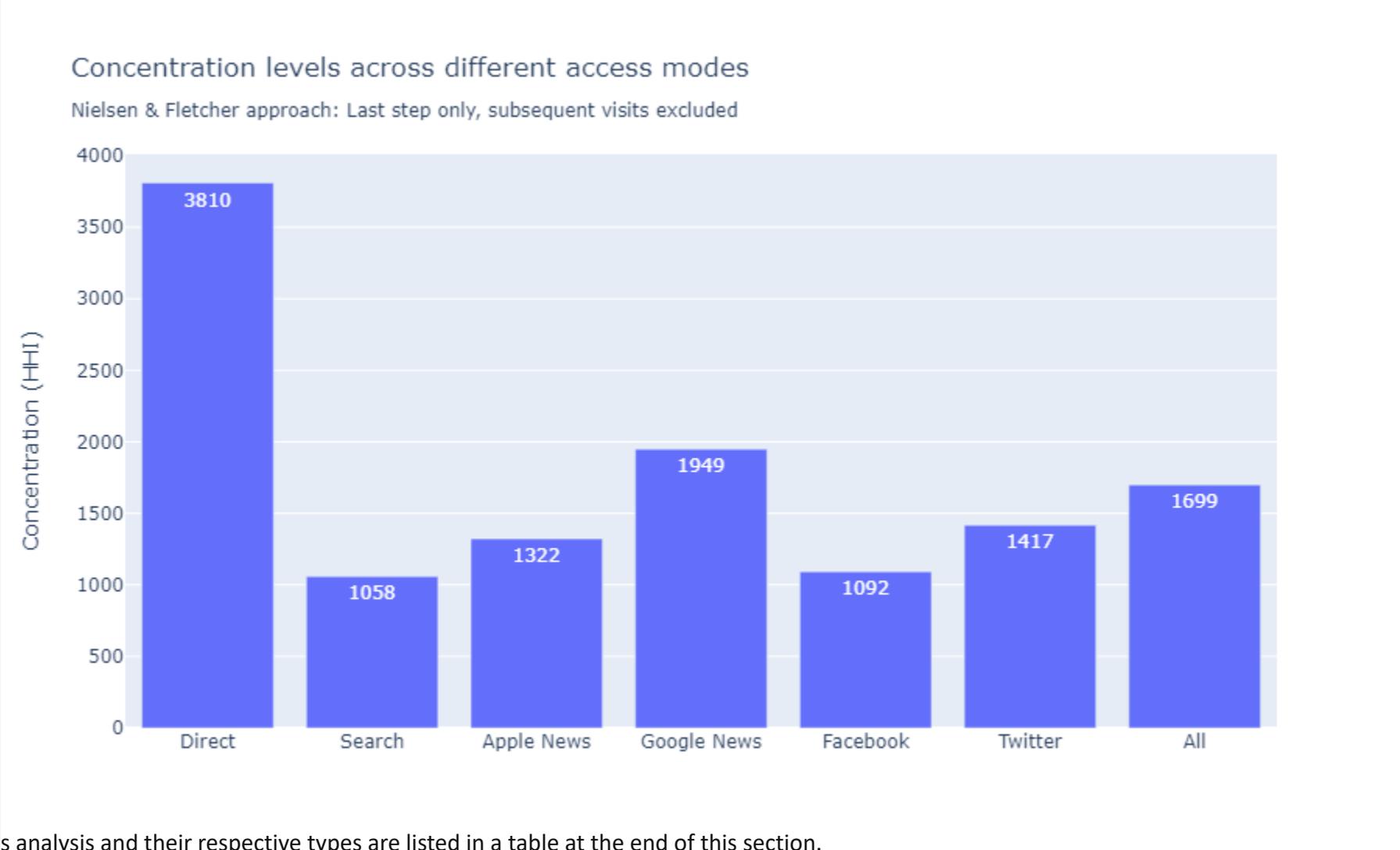
# Nielsen & Fletcher approach: Any source in last step only, subsequent visits excluded



Note: Entities named in this analysis and their respective types are listed in a table at the end of this section.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

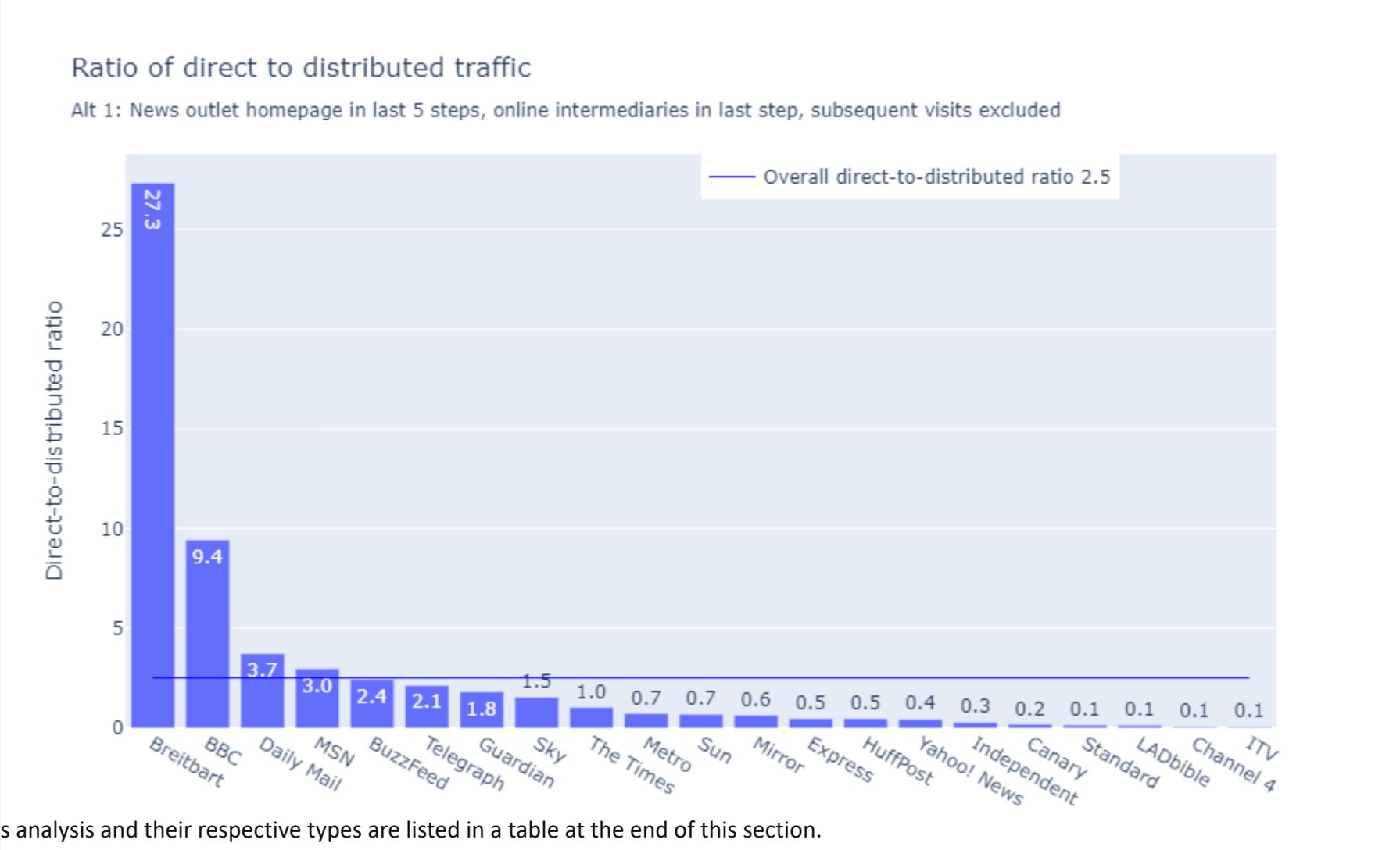
# Nielsen & Fletcher approach: Any source in last step only, subsequent visits excluded



Note: Entities named in this analysis and their respective types are listed in a table at the end of this section.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

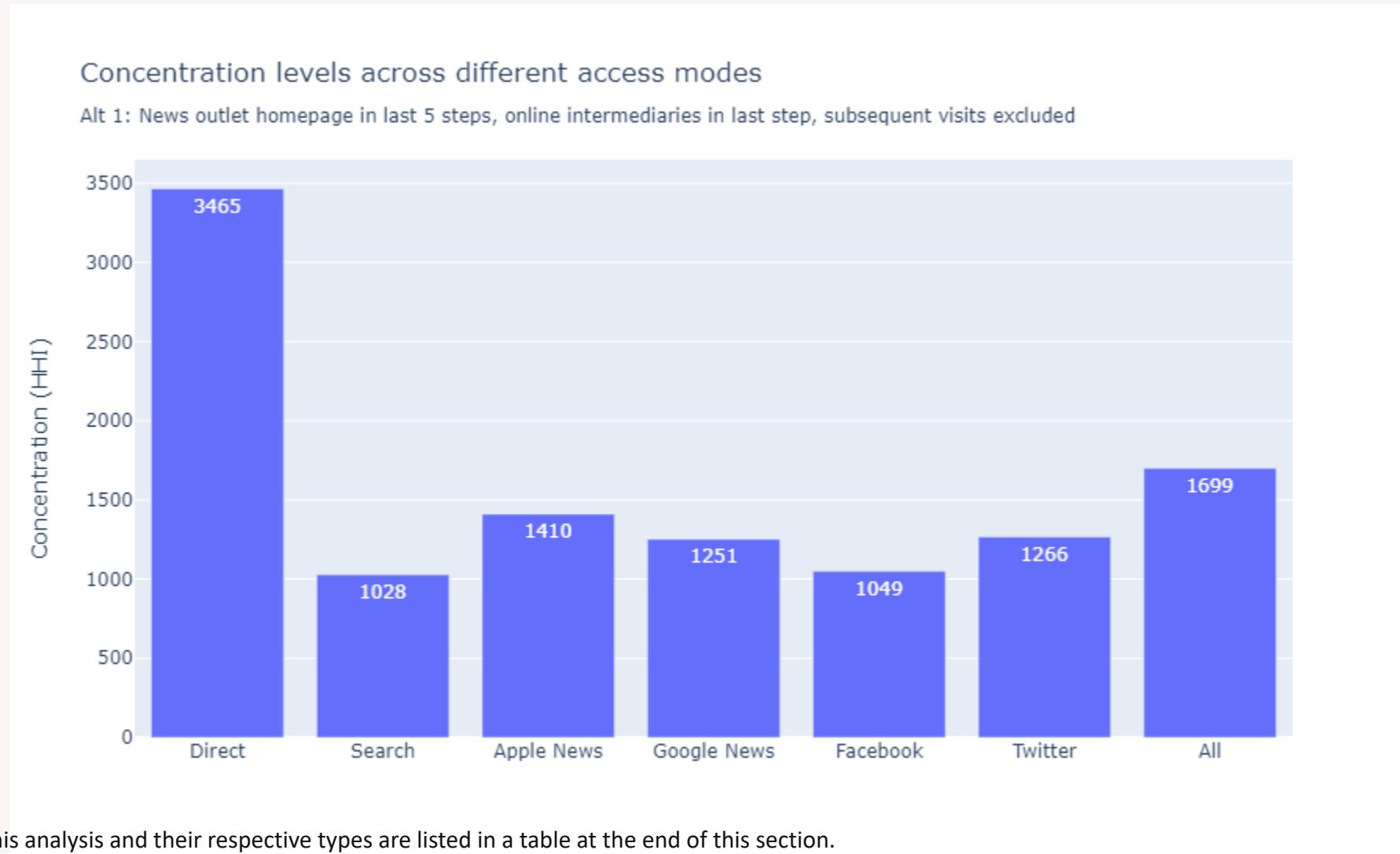
# Alternative approach 1: Outlet homepage within last 5 steps, online intermediaries in last step, subsequent visits excluded



Note: Entities named in this analysis and their respective types are listed in a table at the end of this section.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

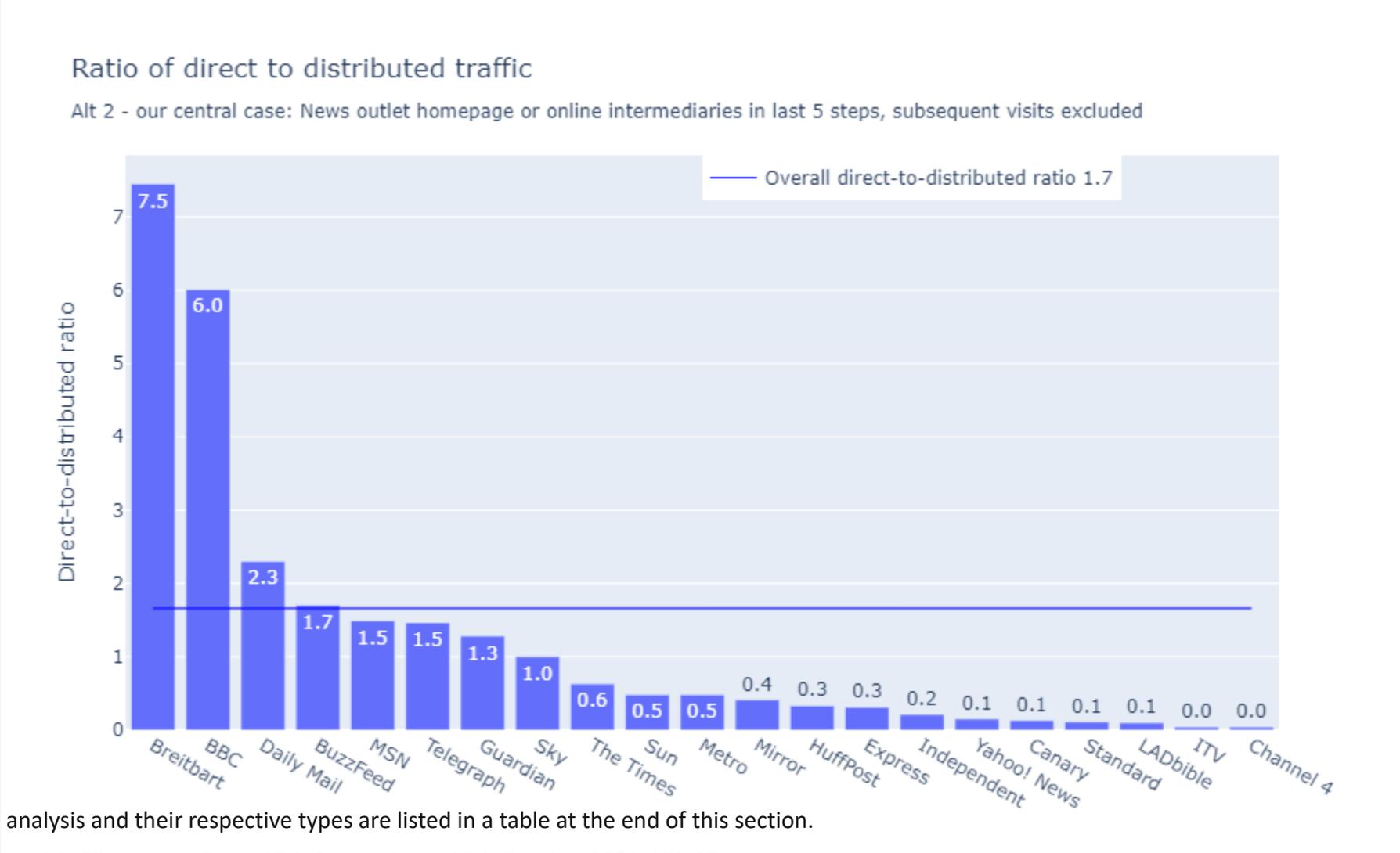
## Alternative approach 1: Outlet homepage within last 5 steps, online intermediaries in last step, subsequent visits excluded



Note: Entities named in this analysis and their respective types are listed in a table at the end of this section.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

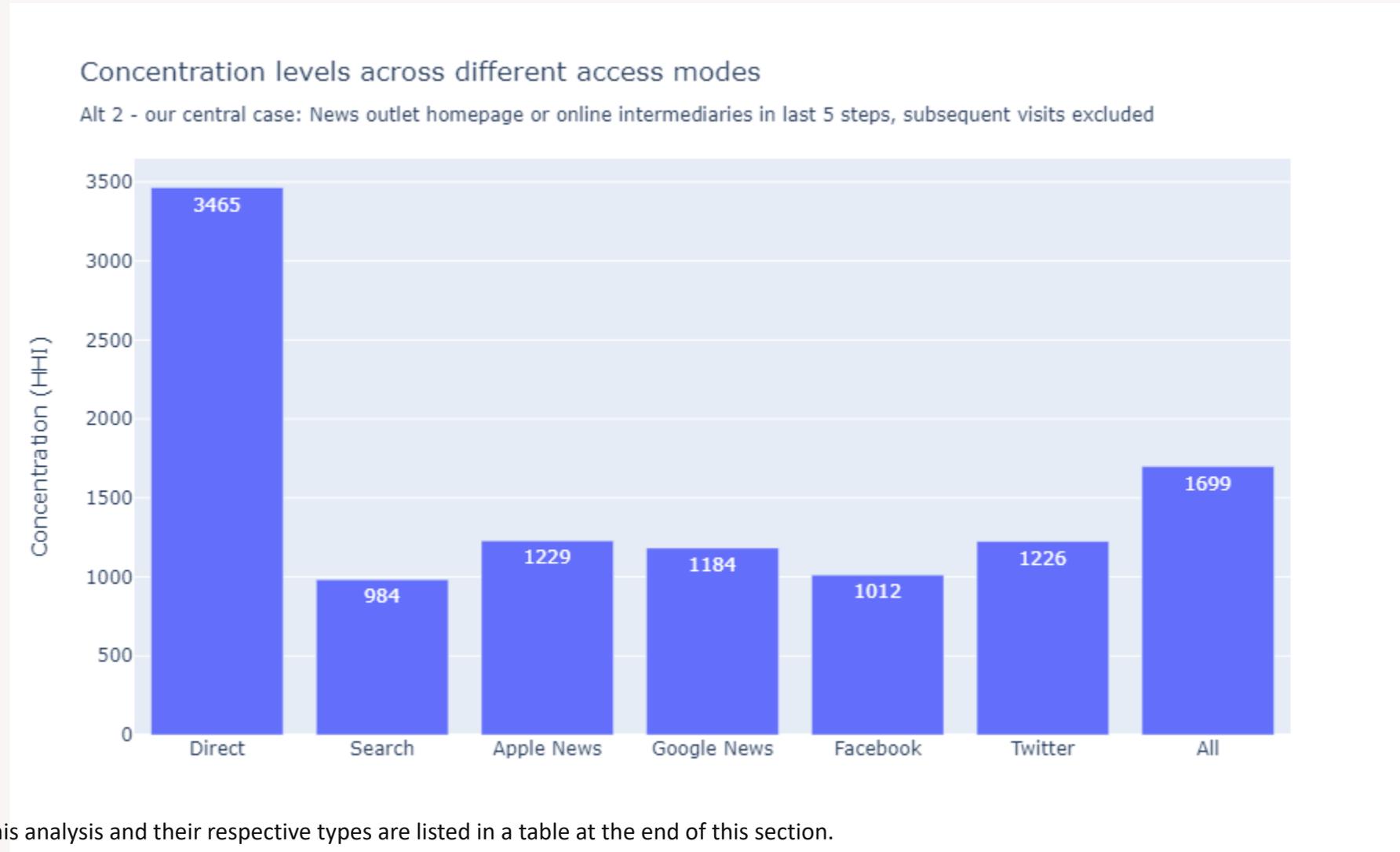
# Alternative approach 2 – our central case: Any source within last 5 steps, subsequent visits excluded



Note: Entities named in this analysis and their respective types are listed in a table at the end of this section.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

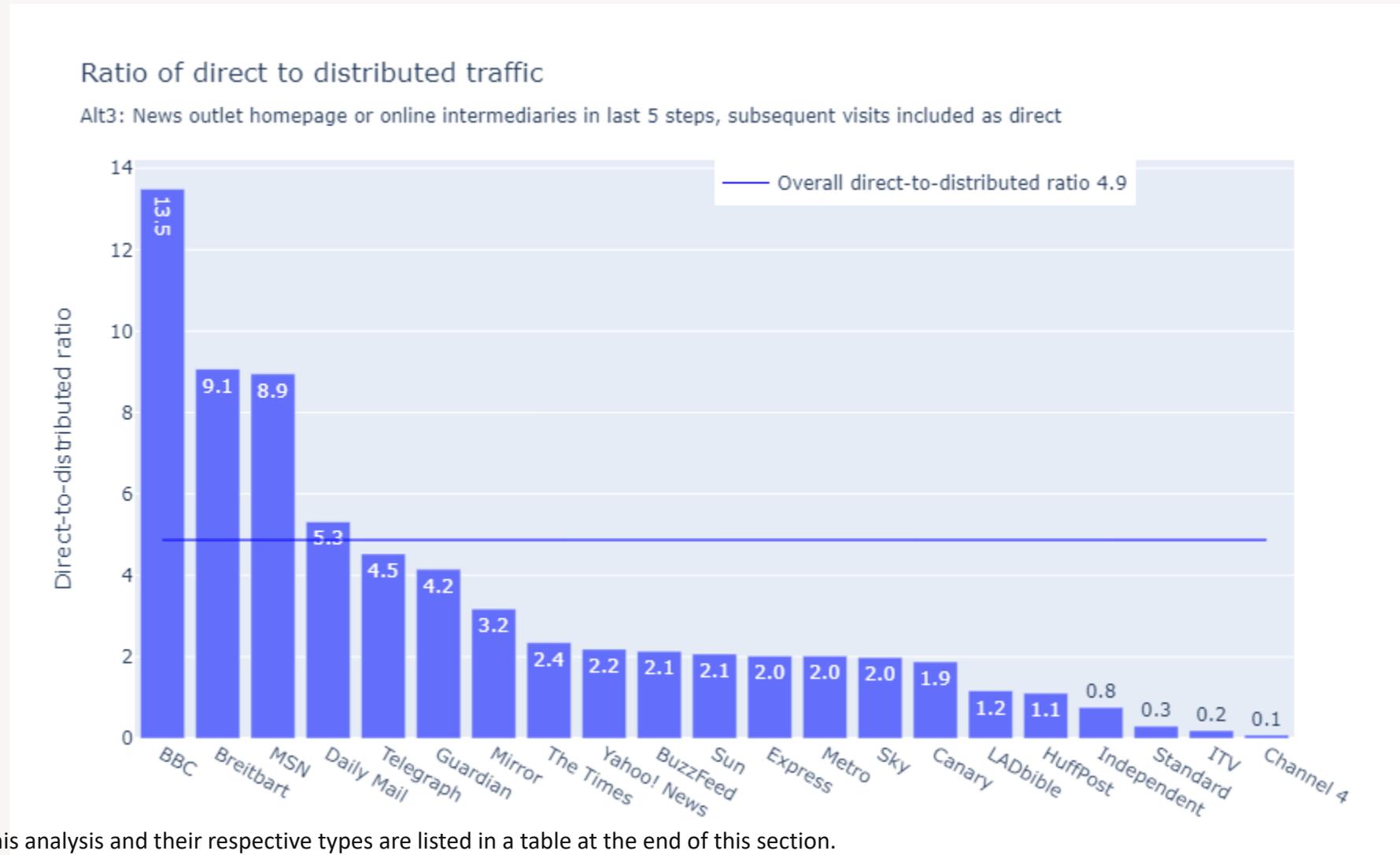
## Alternative approach 2 – our central case: Any source within last 5 steps, subsequent visits excluded



Note: Entities named in this analysis and their respective types are listed in a table at the end of this section.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

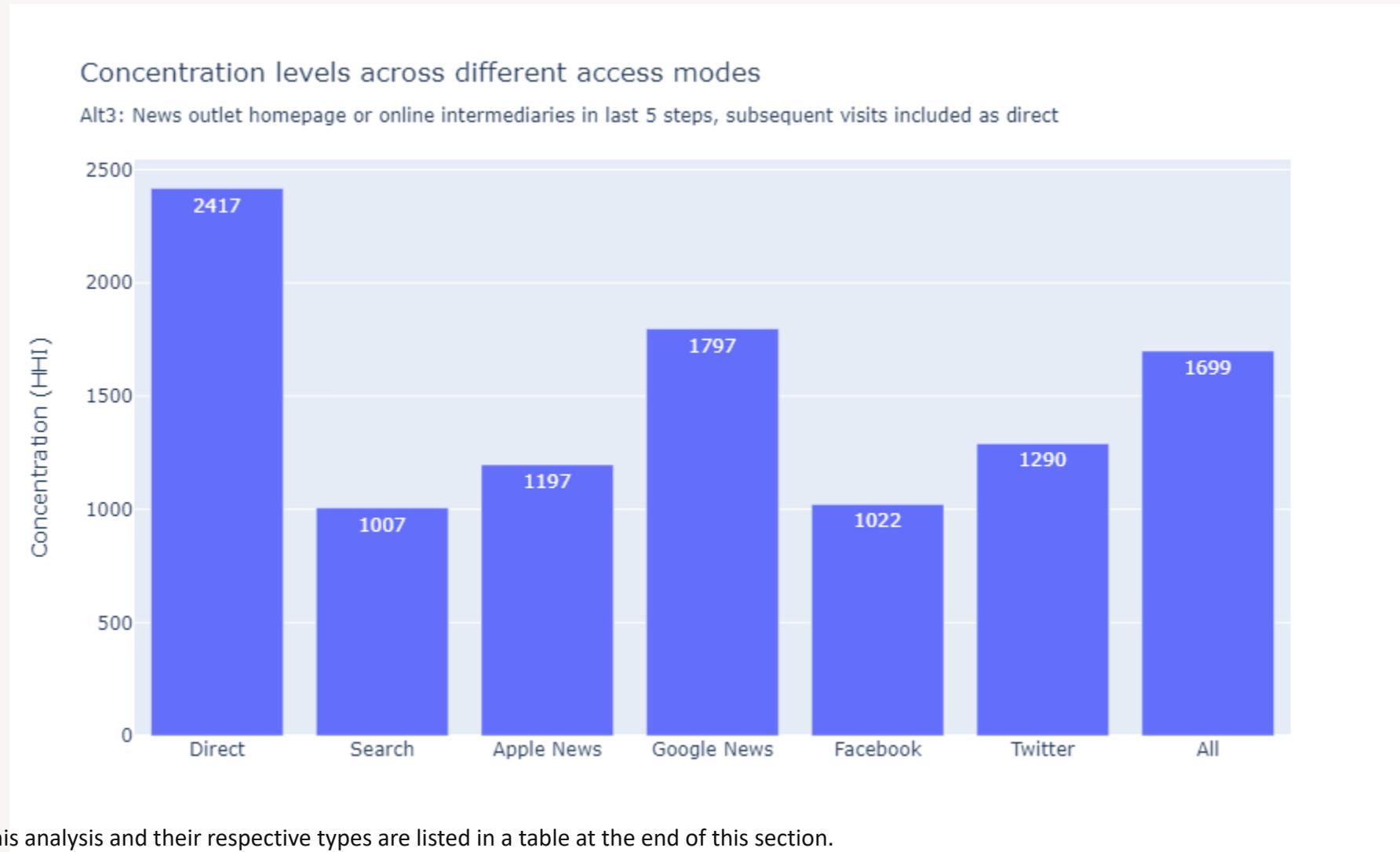
## Alternative approach 3: Any source within last 5 steps, subsequent visits identified as direct



Note: Entities named in this analysis and their respective types are listed in a table at the end of this section.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

## Alternative approach 3: Any source within last 5 steps, subsequent visits identified as direct



Note: Entities named in this analysis and their respective types are listed in a table at the end of this section.

Source: Ofcom analysis of Ipsos Iris Clickstream Data, 15th September – 15th October 2021, UK, 15+

# Entities named in our analysis

| Entity name                                                                                                                                                      | Entity type – news articles | Entity type – referral source | Entity name                                                                                                                                                                                                     | Entity type – news articles | Entity type – referral source |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|-------------------------------|
| <b>BBC</b> (bbc.co.uk, bbc.com; BBC News app)                                                                                                                    | Website                     | Total website and app         | <b>Mirror</b> (mirror.co.uk; Daily Mirror Newspaper app, The Mirror app)                                                                                                                                        | Website                     | Total website and app         |
| <b>Breitbart</b> (breitbart.com; Breitbart app)                                                                                                                  | Website                     | Total website and app         | <b>MSN</b> (msn.com; MSN News – Breaking Headlines app)                                                                                                                                                         | Website                     | Total website and app         |
| <b>BuzzFeed</b> (buzzfeed.com, buzzfeed.de, buzzfeednews.com; BuzzFeed app)                                                                                      | Website                     | Total website and app         | <b>Sky</b> (sky.com; Sky News app)                                                                                                                                                                              | Website                     | Total website and app         |
| <b>Canary</b> (thecanary.co)                                                                                                                                     | Website                     | Website                       | <b>Standard</b> (standard.co.uk; Evening Standard app)                                                                                                                                                          | Website                     | Total website and app         |
| <b>Channel 4</b> (channel4.com)                                                                                                                                  | Website                     | Website                       | <b>Sun</b> (thesun.co.uk, thescottishsun.co.uk; The Sun Mobile – Daily News app, The Sun Newspaper app, The Sun – News, Sport & Celeb app)                                                                      | Website                     | Total website and app         |
| <b>Daily Mail</b> (dailymail.co.uk, mailonsunday.co.uk; Daily Mail Newspaper Edition app, Daily Mail Online app, Daily Mail Plus app, MailOnline app, Mail+ app) | Website                     | Total website and app         | <b>Telegraph</b> (telegraph.co.uk; Telegraph Newspaper Edition UK app, The Telegraph app, The Telegraph UK – Live News app, The Telegraph UK app, The Telegraph for Android app)                                | Website                     | Total website and app         |
| <b>Express</b> (express.co.uk; Daily & Sunday Express app, Daily Express app, Daily Express Mobile app)                                                          | Website                     | Total website and app         | <b>The Times</b> (thetimes.co.uk, thesundaytimes.co.uk; The Times & Sunday Times News app, The Times & The Sunday Times app, The Times and Sunday Times Tablet Edition app, The Times and The Sunday Times app) | Website                     | Total website and app         |
| <b>Guardian</b> (theguardian.com; The Guardian app)                                                                                                              | Website                     | Total website and app         | <b>Yahoo! News</b> (yahoo.com; Yahoo News app, Yahoo News Digest app, Yahoo_News app)                                                                                                                           | Website                     | Total website and app         |
| <b>HuffPost</b> (huffingtonpost.co.uk, huffingtonpost.com, huffingtonpost.es, huffingtonpost.fr, huffingtonpost.gr, huffpost.com; Huffington Post app)           | Website                     | Total website and app         | <b>Google Search</b> (google.com; Google app)                                                                                                                                                                   | N/a                         | Total website and app         |
| <b>Independent</b> (independent.co.uk, indy100.com; Independent Daily Edition app, Independent Premium app, Independent Premium UK app)                          | Website                     | Total website and app         | <b>Apple News</b> (Apple News app)                                                                                                                                                                              | N/a                         | App                           |
| <b>ITV</b> (itv.com; ITV News app)                                                                                                                               | Website                     | Total website and app         | <b>Google News</b> (google.com; Google News app)                                                                                                                                                                | N/a                         | Total website and app         |
| <b>LADBible</b> (ladbible.com)                                                                                                                                   | Website                     | Website                       | <b>Facebook</b> (facebook.com; Facebook app)                                                                                                                                                                    | N/a                         | Total website and app         |
| <b>Metro</b> (metro.co.uk; Metro Digital Edition app, Metro Newspaper app, Metro app)                                                                            | Website                     | Total website and app         | <b>Twitter</b> (twitter.com; Twitter app, Twitter Lite app)                                                                                                                                                     | N/a                         | Total website and app         |



# Technical annex



# Methodology: Ipsos Iris

Launched in early 2021, Ipsos iris is the [UKOM-endorsed currency](#) for the measurement of audiences of online content among UK adults aged 15+ who use the internet at least once a month.

Ipsos iris uses a hybrid methodology with several data sources including:

- A passive single-source panel of over 10,000 adults who use the internet. The panellists install passive tracking software onto their personal digital devices that access the internet (smartphones, computers and tablets), with data collected continuously. The panel is recruited to be representative of the internet population demographically, geographically and by type of device used.
- Census measurement of publisher websites and apps to collect measurements of visitor time spent and page views at a total level.
- The [Establishment Survey](#) to produce universe targets. The Ipsos iris panel is then weighted to the internet population of UK adults aged 15+ and demographic sub-groups.
- External first-party data from accredited and approved sources with additional website or app-level targets.

# Methodology: Ipsos Iris

Reporting on daily and monthly data, all sources are fused together to create a synthetic dataset with more than one million records to represent the UK online infrastructure of websites and apps. These can be analysed and reported at many demographic and geographic levels. As this is a synthetic dataset, it is not possible to provide confidence intervals/ranges for extrapolated population estimates. However, it should be noted that all extrapolated population figures provided are estimates that will have some margin of error.

The term 'visitor' is used to represent UK adults who open a website or app. Visitors do not represent account holders where websites or apps offer account logins for their service.

For the analysis used here, we have used raw data from the passive single source panel independent of the syndicated data produced by Ipsos, covering the period from 15 September to 15 October 2021. Within these data, there were >13,000 panellists. Just over 11,000 of these had accompanying demographic information. In the analysis replicating the Nielsen and Fletcher work, the whole dataset was used. In the other analysis in this pack, only those panellists with demographic information were included.

More detail on the Ipsos iris methodology can be found [here](#).