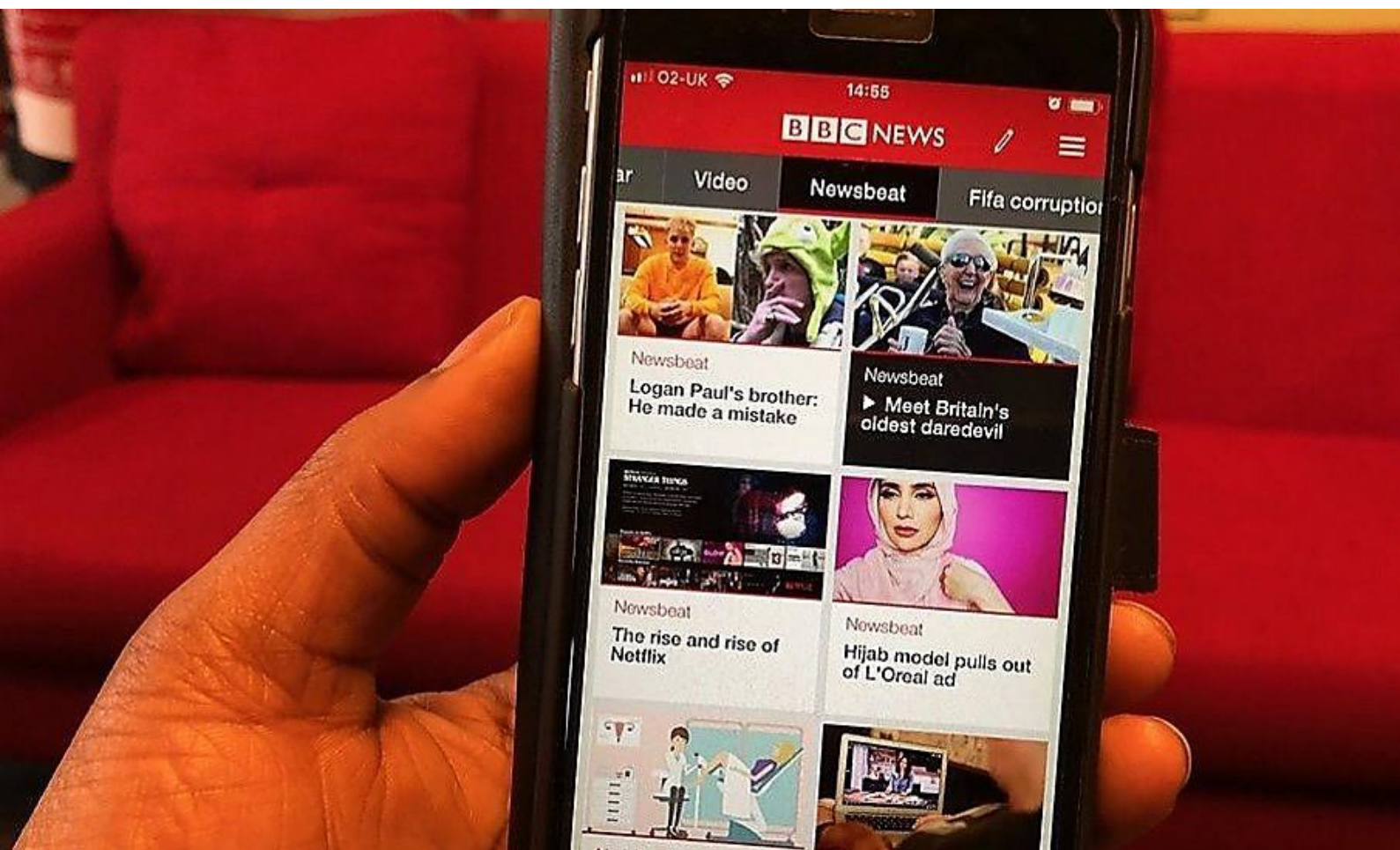


# KANTAR

## BBC News Review: Smartphone News Journeys

### Summary Report October 2019

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## Introduction

The news landscape is changing. It is becoming increasingly complex and competitive in the digital world. Content is being distributed through aggregators and social media, as well as individual publishers; traditional news publishers and new competing digital brands are exploiting a myriad of platforms; all the while there are multiple rolling 24-hour news channels on TV. News is ubiquitous – it is pushed as well as actively consumed.

It is within this context that Ofcom commissioned Kantar to undertake analysis of smartphone behavioural data as part of its review of the BBC's provision of news and current affairs.

The aim of this research was twofold. First, we wanted to identify what adults in Great Britain do on their smartphone directly before and after consuming news to form types of 'smartphone news journey'. Next, we wanted to profile different types of news consumers to understand which audiences are being served well and less well by the BBC.

## Key findings

- **News consumption is a key online activity** for the average smartphone user. BBC is the main source they consume on their smartphone, though users frequently turn to Apple News, Sky News and Mail Online too
- BBC is serving **older, more affluent consumers** well, particularly for those seeking out information about a topic or news story via search engines and web browsers
- Younger audiences, who are more likely to get their **news from social media**, are less well served by the BBC. For them, BBC is less likely to be top of mind and less likely to be a top site visited when compared to older audiences.
- Higher **engagement with BBC News** mirrors higher engagement with **smartphone news** in general and vice versa. All the while, BBC maintains its position as the top website visited or top app recalled relative to other news brands

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## Summary of approach

We took a two-staged approach to research to look at smartphone usage and people's attitudes, media behaviour and demographics.

### Stage 1 - The 'What'

- We analysed behavioural smartphone data and identified nine most frequently occurring types of news journey undertaken on smartphones
- News journeys were created by looking at the two steps before news was consumed and the two steps after, therefore making five-step journeys with news consumption as the middle-step. Any smartphone sessions ending or starting with news led to three-step journeys
- We then looked at the types of apps and website visited in a news journey, how much time was spent on each, and what time of day the journey was likely to take place

Step = Any change made by the user in their phone activity, including any clicks within apps

Session = The whole activity of any user on their phone until a 5-minute period of inactivity

Journey = The activity grouping consisting of 2 steps before and 2 steps after news consumption

## Stage 2 – The ‘Who’

- We added the journeys found in Stage 1 to a large-scale consumer survey
- We used this consumer survey data to analyse users of these journeys by looking at their demographics, attitudes, media preferences, news consumption and relationship to the BBC. 6 out of 9 journeys had sample sizes large enough for this stage of analysis
- We reported on the largest and most likely characteristics found in a group, when compared to the average smartphone user
- Note: users of news journeys aren’t mutually exclusive; an individual could have consumed news using more than one type of news journey

Please refer to the “Full Methodology” section at the end of the report for a more in-depth understanding of the approach.

## Findings

### 1. The majority of GB adults consume news on smartphone

According GB TGI Clickstream, there are 52.5 million adults aged 16 years or more in Great Britain and of these:

- 87% (45.5 million) own a smartphone
- 74% (39 million) consume news on their smartphone

As well as engaging with news content on their mobile, smartphone users consume news across different media types, both online and offline.

### 2. News is a key category of website/app visited amongst smartphone users, with BBC being the main news source consumed

News websites/ apps were visited by smartphone users more than any other category, with the exception of web browsers. BBC activity was present every 1 in 2.6 sessions and was the most visited news source, above aggregators<sup>1</sup> such as Apple News and apps/websites such as Daily Mail and Sky News.

APP / WEBSITE CATEGORIES	
1. Web Browser	6. Search
2. <b>News</b>	7. Rewards/Points
3. Utilities	8. Email
4. IM	9. Retailer
5. Social networks	10. Video Stream

Table 1. Repertoire of categories visited on smartphone (by number of times used)

Users were more engaged with news when BBC News appeared in a smartphone session compared with sessions which did not involve BBC News. They spent more time on news content compared to sessions with news aggregator Apple News and social media style news provider BuzzFeed. We

NEWS	
1. <b>BBC</b>	6. The Times
2. Apple News	7. The Sun
3. Daily Mail	8. Guardian
4. Sky News	9. Mirror
5. BuzzFeed	10. Digital Spy

Table 2. Repertoire of apps/websites visited (by number of times used)

deduced that they may instead be turning their attention to other things happening on the app/website (e.g. social media, video streaming). BBC was also more likely to spark interest among users to search

<sup>1</sup> A news aggregator is an app that pulls in content from various news sources and displays them in one location to make it easier for users to view multiple sources at once.

for more content when compared with Daily Mail, as evidenced by follow up behaviour using search engines, Wikipedia and Twitter.

We also saw differences in news consumption between users and non-users of social media. Social media users consume news generally in short, sharp bursts of activity with limited mobile activity elsewhere (e.g. search, email) and tend to use fewer news sources. In contrast, smartphone users who do not use social media on their phone tend to use multiple news sources and aggregators and appear to be more likely to use the BBC on both app and website.

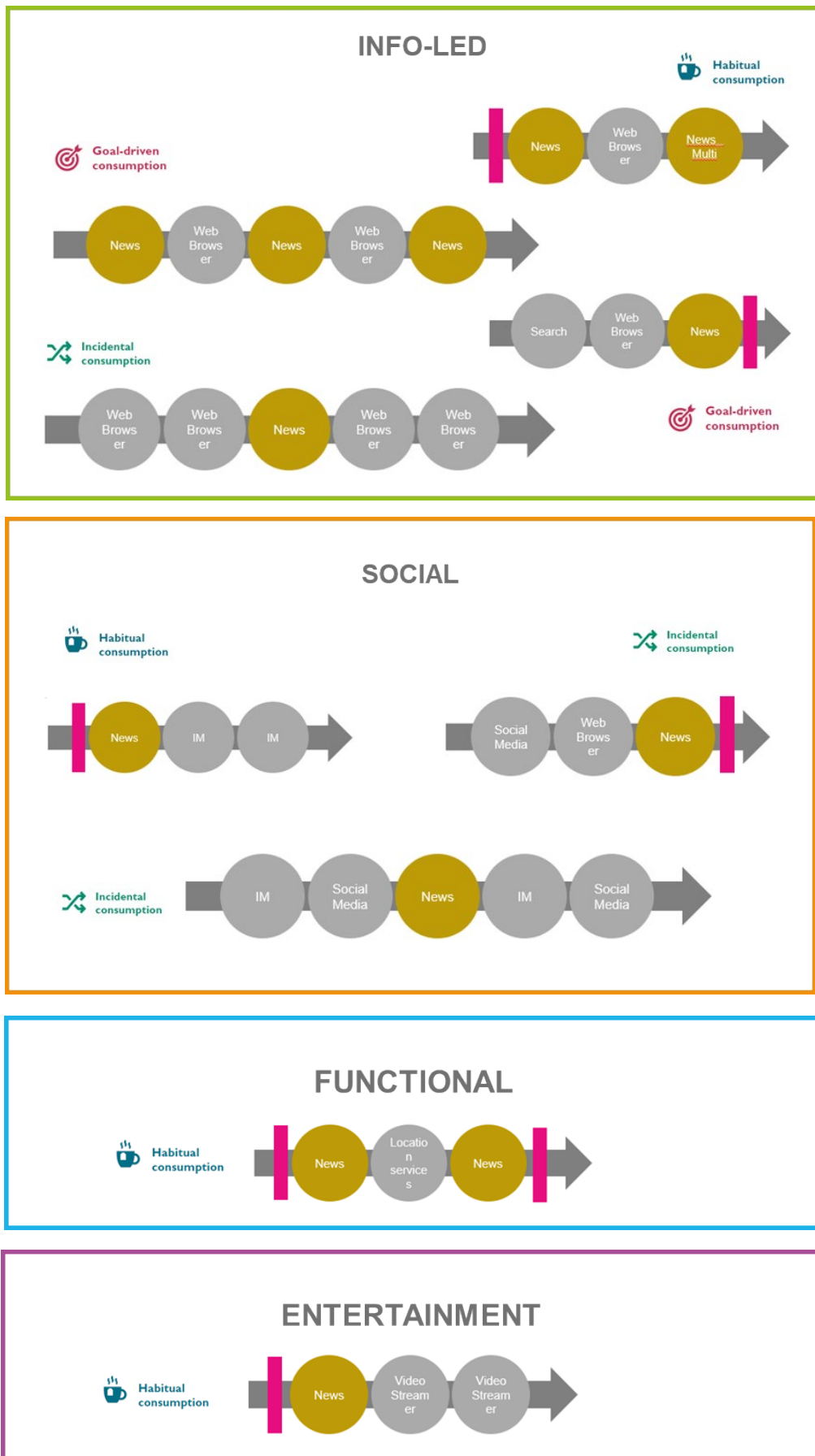
### **3. News journeys differ depending on the need of the smartphone user**

We identified nine news journeys in our dataset, and these journeys were then split into four different categories depending on the dominant steps (e.g. email, social media) which surrounded the news activity. These categories are Information-led, Social, Functional, and Entertainment (see fig. 1).

- Information-led (info-led) journeys were often habitual and goal driven, as the user appeared to seek out information about a topic or news story via search engines and web browsers.
  - *Four info-led news journeys were identified in stage 1. All had large enough sample sizes for analysis at stage 2.*
- Social journeys were usually incidental (e.g. users may have come across the news while scrolling online) and involved interaction with social media or messaging services prior to consuming news. Where the social journey was habitual, we surmised that the user engaged with news as part of their morning journey before switching to instant messaging services.
  - *Three social news journeys were identified in stage 1. Two had large enough sample sizes for profiling in stage 2.*
- Functional journeys included steps in the journey such as using location services
  - *Functional news journeys were not carried through to stage 2 analysis due to small sample sizes (below 50).*
- For entertainment journeys, news consumption was followed by activities such as video streaming.
  - *Entertainment news journeys were not carried through to stage 2 analysis due to small sample sizes (below 50).*

We will now report on the six news journeys that were profiled in stage 2.

Figure 1. 9 News journeys revealed in stage 1

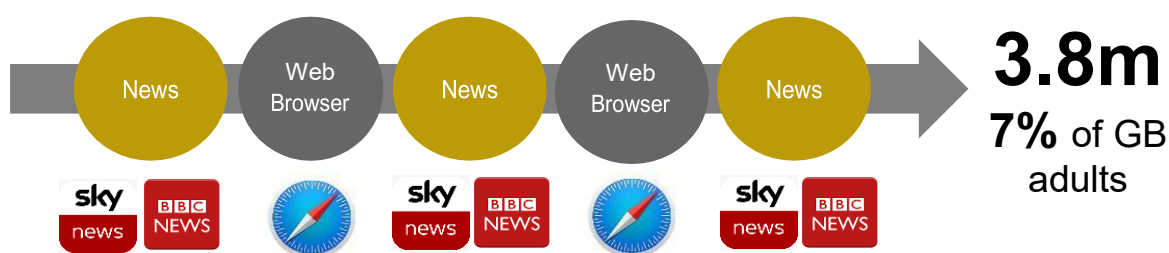


## Info-led News Journeys

### 4. BBC is strongly positioned for information-led news consumption among older, more affluent smartphone users

The four info-led news journeys are connected by their purpose to seek out information. Overall, users are likely to be over 25 years of age and affluent, with many residing in the South West or East of England. They are engaged with news and have a medium to strong relationship with the BBC; users often turn to BBC for news and current affairs, although the degree to which this occurs differs between groups.

#### 4.1 Info-Led: Web Browser, News Dominant



This news journey is part of a longer session in the morning and at night, suggesting a routine and thus habitual consumption. Although having a broad repertoire of news sources, the user sticks to a few news publications, most often through the app. They may use the web browser to engage further, by clicking on external references within the article. This group have average engagement with news during their session. Sky News and BBC News app are the most frequented news sources during this journey, whilst Safari is the most visited web browser.

These news journey consumers skew towards females, aged 45-64, ABC1 social grade and are likely to live in London, South West or the East of England. They have above average levels of education and income and are likely to be in full time work. They tend to be conscious of both social and environmental concerns, which may indicate the type of news they are looking out for.

Digital content is key for this group. For many, newspaper content is now read digitally, and social media is used to follow news brands and magazines. BBC News is the most recalled news app used with Sky News and Daily Mail in second and third place. BBC News is the second most visited website, behind Amazon.

*"I like to follow on social media the magazines/newspapers that I read."*  
32% agree, index: 137

These news consumers are more likely than average to be heavy<sup>2</sup> radio listeners and less likely to read magazines. The proportion of heavy<sup>3</sup> TV users in this group is on par with the average smartphone user. They tend to use various media to keep up with the national news, politics, finance and the economy, with the internet and radio used most for consuming news in general. When asked about their internet usage, news and communications activities (e.g. video and voice calls) dominate.

Heavy BBC Radio listeners are over-represented in this group, though so too are light BBC One viewers. They are more likely to listen to BBC Radio 4 or Radio 1 and over index<sup>4</sup> on watching BBC News at Ten and News at One.

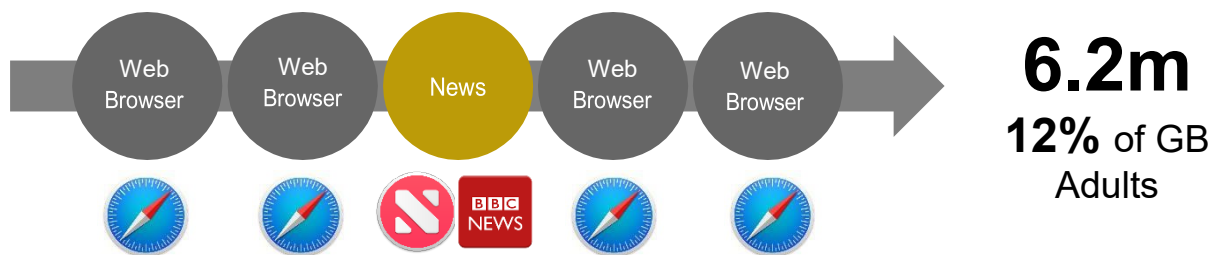
<sup>2</sup> Heavy Radio Listeners: Listen more than 28 hours a week

<sup>3</sup> Heavy TV viewers: View more than 40 hours per week

<sup>4</sup> Index: indicates whether individuals are more or less likely to do something or agree with something. When an index is below 80, the finding is statistically below the average and when it's above 120, the finding is statistically above the average. For example, an index of 126 indicates that this group are 26% more likely than average to agree with something/ do something.



#### 4.2 Info-Led: Web Browser, Web Browser Dominant



This journey is dominated by browsing the web and defined by low news engagement, suggesting it is incidental or goal-driven consumption after seeing information online. The user is most likely browsing while going about their night routine. They use both app and web formats, news being a key step to perhaps verify a point or skim through headlines on BBC and Apple News most frequently.

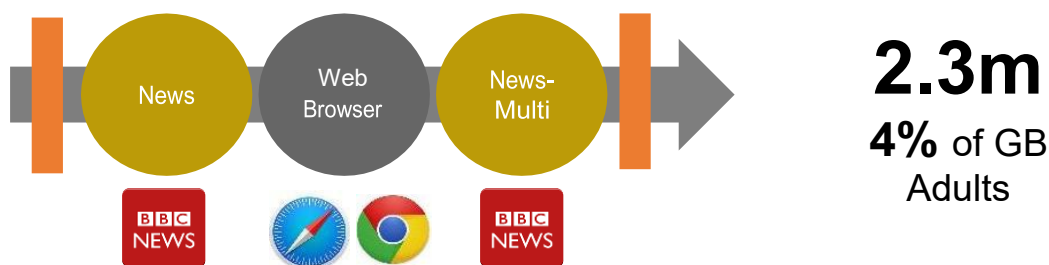
Users of this journey are more likely than the average smartphone user to be aged 25-44 years and to have children in the home. Like the first Info-led, this group are more likely to be found in London, South West or the East of England.

*“I think people rely too much on TV for relaxation”*  
69% agree,  
index: 121

They depend on the internet and mobile phones and are less likely to be heavy<sup>5</sup> readers of magazines and newspapers. Internet is turned to most for news content followed by radio. BBC News is the most recalled news app used, and the top website visited. They are four times more likely to recall usage of the BBC News app than the Sky News app.

Heavy BBC Radio listeners are over-represented in this group, however light BBC One viewers are also over-represented. When it comes to radio, Radio 4 and the BBC World Service are favoured, compared to the average smartphone user.

#### 4.3 Info-Led: News Grouping



This journey is dedicated to news, with the user focusing on a few trusted sources - such as the BBC – that they engage with heavily. The orange lines indicate the start and end of the journey. As it begins with news, the journey is only 3 steps. This is a habitual or goal driven journey. The purpose could be to find specific information or explore as part of a routine. Throughout the day, we assume that they react to push notifications or come across topics whilst online, leading them to read about the topic in more depth. This results in them having a high engagement in news.

These news journey consumers skew towards males, aged 25-34 as well as 44+ years, in full-time work with above average income and higher social grade. The News Grouping users are also likely to be found in the South West or East of England, with some overrepresentation in Scotland, too.

<sup>5</sup> Heavy Newspaper Readers: Read newspapers every day, Heavy Magazine readers: Read more than 5 magazines per week

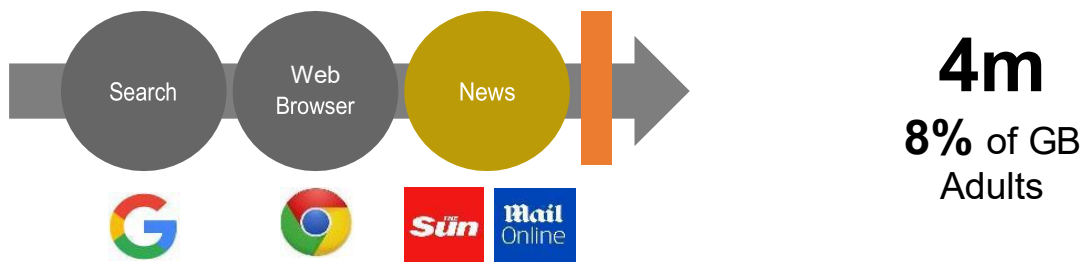


High engagement with news on smartphone is echoed by high usage of news across other media types. These journey users are more likely than the average smartphone user to be heavy<sup>6</sup> newspaper readers and willing to pay to access digital newspaper and magazine content online, with some using print media to stay up to date with National and European news. Heavy<sup>7</sup> radio listening and internet usage are also likely amongst this group, with both media being turned to widely for news content.

*"I always listen to the radio more intently when the news comes on"*  
63% agree,  
index: 136

BBC News is the most recalled news app, followed by Sky News and The Guardian, and is the most visited website. This group are twice as likely as the average smartphone user to be heavy BBC One viewers and three times as likely to be heavy BBC Radio listeners. Radio 4 and Radio 2 are more likely to be their stations of choice, whilst on the TV they seek out the evening and night time BBC News.

#### 4.4 Info-Led: Search



These journeys have a short time spent on news as the final step, suggesting goal driven news consumption. The orange line indicates that the journey ends after news. The user is likely to have been exposed to a piece of information either through their session or other media such as radio or TV, as part of their morning routine. The search is specific and once they find something relevant, they read it briefly before ending the session, suggesting low engagement.

Users of this journey skew towards males, aged over 65 years, retired, married, and have grown up children who have flown the nest. Scotland, Wales and the North East are where this group are more likely to reside, differentiating them from the other Info-Led users.

*"I always listen to the radio more intently when the news comes on"*  
63% agree,  
index 134

More traditional views towards media and advertising are evident amongst these news users. Although the majority insist they couldn't live without the internet on their mobile, they are less likely to be heavy<sup>8</sup> internet users. Practical activities are likely to be undertaken online such as viewing weather forecasts, consulting maps and looking for user reviews. They are less likely to be heavy<sup>9</sup> cinema goers and more likely to be heavy<sup>10</sup> users of magazines, specifically ones that let them keep up with the latest science and technology.

Some are loyal to local newspapers and radio stations as they value local news.

Like earlier info-led news journey users, BBC News is the top news app recalled and website visited. After BBC News, this group are likely to visit other news sources like The Sun and Mail Online, as well as online grocery shopping sites. The internet and radio are used most widely to access news content whilst social media is far less likely to be used for this purpose.

Medium listeners of BBC Radio and medium viewers of BBC One are over represented in this group when compared to the average. BBC Radio 4 is likely listened to by these users. Unlike consumers of the other news journeys, this group are most likely to use their TV set to watch iPlayer compared with

<sup>6</sup> Heavy Newspaper Readers: Read newspapers every day

<sup>7</sup> Heavy Radio Listeners: Listen more than 28 hours a week, Heavy Internet User: Use more than 40 hours a week

<sup>8</sup> Heavy Internet User: Use more than 40 hours a week

<sup>9</sup> Heavy Cinema goers: Go once a week or more often,

<sup>10</sup> Heavy Magazine readers: Read more than 5 magazines per week

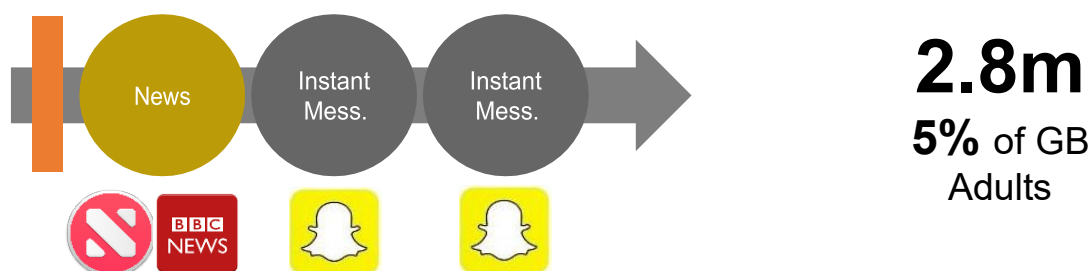
other devices (such as mobile, tablet or laptop) and tend to choose entertainment programmes when watching TV.

## Social News Journeys

### 5. Social news journeys are associated with lower engagement with news and the BBC

Social news journey users appear to have less interest in news than some of those on info-led journeys. They're likely to be young (under 45 years old), female and social grade BC1. Their news journey is punctuated with social media consumption and a brief engagement with news.

#### 5.1 Social: Instant Messenger



Users start their session on news (as indicated by the orange line), engaging with this step briefly before switching to messaging. Low engagement with this first step suggests a spontaneous news consumption. We could hypothesise that after receiving a notification from a dedicated or aggregator news app, the user opens the app for curiosity and then moves onto Snapchat. BBC and Apple News act most often as triggers for this type of journey, suggesting the user is in the habit of paying attention to these news sources.

Consumers of this news journey skew towards females, aged 16-34 years, single, and higher socio-economic groups. They tend to be spread across the east of the country, likely living in Yorkshire and The Humber, East of England and down to the South East. They are more likely than average to be in full time education, though many have now entered the workforce.

As the name suggests, this group is much more likely to stay connected online and check in with their social media regularly. They are likely to proclaim that watching TV is their favourite pastime with many preferring to curate their own viewing schedule, using on-demand services, or streaming. It's unlikely to find heavy<sup>11</sup> consumers of "non-digital" forms of media such as newspapers amongst this group.

*"I feel the need to check social networking sites every day"*  
67% agree,  
index: 131

While the BBC News app is the most recalled news app used, they are the least likely group across all news journey users to do so. BBC News doesn't rank amongst the top websites visited, with Facebook, Twitter and Google instead in the top 5, and entertainment sites such as Sky and Cineworld also making the list. This group are much less likely to consume news on TV or radio and less likely to read a physical paper.

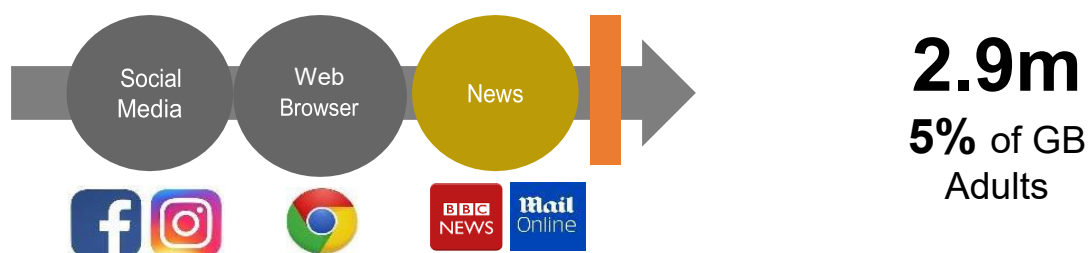
Below average engagement with BBC is evident amongst this group. They are less likely to watch BBC One, BBC Two or BBC Four and are also less likely to listen to BBC Radio 2 or Radio 5 Live. When they do watch BBC TV, their programmes of choice include reality shows such as The Apprentice and

<sup>11</sup> Heavy Magazine readers: Read more than 5 magazines per week, Heavy Radio Listeners: Listen more than 28 hours a week, Heavy Out of Home Media Consumer: Travel 9 hours or more a week to get exposure to advertising

MasterChef. iPlayer content is likely watched on computer or mobile devices, though to a lesser degree than other news journey consumers.

Young, instant-messaging-oriented consumers aren't identifying as strongly with the BBC as other consumers. They are less likely than others to cite BBC News as their top news app and have a weaker relationship with BBC across other media types as well. Their news journey is dominated by fleeting incidences of news, often via social media.

## 5.2 Social: Social Media



Smartphone users in this journey are coming across news through social media. They spend less time reading articles and consult fewer news sources, suggesting this is part of a morning routine where they are incidentally consuming news. This indicates that they have low engagement with news. They prefer web formats and search directly in the browser for something they saw on social media. BBC and Daily Mail are the key sources for different types of information required. Once they have the relevant information they end the session.

These news journey consumers skew female and aged 25-34 years. Many are university educated, though there is an above average representation of individuals who have completed secondary education only. This group are more likely to live in the South West, East of England and Wales. Many are in full time work, are single, and skew towards social grade BC1. Convenience is important to this Social Media group, as they seek out technology and apps that make daily life easier.

**“Nearly all TV advertising annoys me”**  
64% agree,  
index: 124

Social media is checked daily and, as other groups have agreed, they cannot manage without the internet on their smartphone. They are less likely to be heavy<sup>12</sup> users of media such as newspapers, radio and TV. They are not open to TV advertising. Instead, many enjoy crafting their own TV schedule. This group are more likely to engage with politics, both online and in newspapers and some are interested in staying up to date with sports news.

Social media, messaging, and news consumption dominate their internet usage, with YouTube and Twitter ranked as the most visited websites, respectively. BBC is the third most visited website whilst BBC Sport ranks fifth. BBC News is the most recalled news app used, three times more likely to be used than the next app on the list, the Daily Mail. Unlike other news journey consumers, this group are likely to turn to social media for news, as well as the internet. Over half of these individuals still read newspapers, though they are more likely than average to use tablet for this content.

This group have a broadly average relationship with BBC TV channels and when they do tune in, they watch chat show content. They are likely to watch BBC iPlayer on their mobile or tablet. Their interest in listening to BBC Radio generally is in line with the average smartphone user, though they are more likely to listen to Radio 2.

<sup>12</sup> Heavy Newspaper Readers: Read newspapers every day, Heavy Radio Listeners: Listen more than 28 hours a week, Heavy TV Watchers: Watch for more than 40 hours a week

## Engagement with News

### 6. Those who don't consume news on their smartphone reflect a less news-engaged audience generally, and appear harder-to-reach for the BBC

Whilst identifying smartphone news consumers is important, it was also useful to have a grasp on who isn't currently using their smartphone for news. Non-smartphone news consumers tend to be male, married, and C2DE social grade. This group is more likely than the average smartphone user to live in the East Midlands. They are more likely than average to be out of work (either because they are retired, have a long-term illness or are disabled). Many prefer to get their news from local newspapers and radio stations and are less likely to be heavy<sup>13</sup> readers of newspapers, although over half say they prefer to read a physical copy.

**6.3m**  
**12% of GB**  
**Adults**

When choosing to watch BBC content, news content ranks amongst the BBC programmes watched - News at Six and BBC One early evening regional news. In terms of radio, BBC local radio is more likely consumed amongst this group vs the average.

### 7. The level of news engagement correlates with the level of BBC news usage

Info-Led: News Grouping users, the group most heavily engaged with smartphone news, are also the most highly engaged with the BBC. Typically, these consumers are more loyal to the news brands they consume and show higher levels of news consumption across other media platforms.

The Info-Led: Web Browser, News Dominant group, with average smartphone news engagement, show broad engagement with news, using a variety of news brands. Overall, they have high usage of BBC News, particularly the website vs the app.

Those who spend less than a minute on news in a smartphone session, and therefore have low engagement with news, also have lower levels of BBC News usage.



<sup>13</sup> Heavy Newspaper Readers: Read newspapers everyday

## Summary and Implications

Smartphones play a vital role in the life of most adults in Great Britain and the majority (74%) consume news on their smartphone, giving the BBC an enormous potential reach. Around 4 in 10 have used the BBC News app or website on their smartphone in the last month, indicating that although they are in a strong position, they have the potential to reach more people. BBC News features heavily across news journeys, particularly for info-led consumption with goal driven and habitual behaviours, and BBC is top of mind when it comes to recall of news apps used. As a result, it may be the more spontaneous, incidental news journeys where the BBC are missing out. BBC have a weaker hold on younger, social media focused audiences.

BBC News is competing for attention in an increasingly crowded market of news apps, websites and aggregators. Although often ranked amongst the top visited websites and apps, other sources such as Apple News, Sky and Daily Mail were often close behind. BBC News is also vying for attention with other online activities such as social media and messaging services, entertainment, and gaming. This leads to a fleeting engagement with news as consumers pass through to other sites.

Smartphone news is only part of the news landscape. Although the internet, irrespective of device, is the most widely turned to source for news content, for many, radio, newspapers, and TV are still well visited sources. Print newspapers are particularly popular amongst the Info-Led news consumers. Older audiences are heavier listeners of BBC Radio than younger audiences and generally more engaged with BBC across platforms.

The BBC is strongly positioned for information-led consumption among older demographics, but needs a better integration into the social journeys particularly amongst younger adults. Overall, whilst BBC News is undeniably a strong performer when it comes to smartphone news, the progression of new technology and news sources means it must be innovative to stay relevant in this ever-changing landscape. As the younger generations age, BBC must not rely solely on its heritage to retain consumers.

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## Full Methodology

We used our Kantar-owned GB TGI clickstream data as the source of large-scale behavioural and survey data. These respondents participated in the TGI research during January 2018 to December 2018.

Included in our total sample were 1,016 smartphone users aged 16 years or more with a spread of gender, age, social grade and region. Of these smartphone users, 879 had consumed some form of news on their smartphone, and so formed the base of our passive data news journey analysis. See table 3 for sample profile.

The TGI survey is the oldest single source survey in Britain which is completed every year by around 25,000 adults aged 15 years or more. TGI Clickstream passively measures visits to 1,000 web domains and sub-domains, as well as 300 mobile (smartphone and tablet) sites and 300 (smartphone and tablet) apps. This sits alongside survey data including product and brand use, attitudes and motivations, media and digital consumption and engagement, leisure activities and demographics. Our passive Clickstream data is collected through metering software. Meters are deployed in the form of an app which we ask panellists to download and install on their device.

### Stage 1 - The 'What'

On average, each smartphone user had their phone data tracked for 24 days (minimum 2 days, maximum 26 days).

As there were differences between the number of days each respondent was tracked, the sample data was weighted so each respondent's smartphone activity was equal in terms of importance.

No weighting on demographics was applied to the behavioural data for the purposes of news journey analysis.

#### *Journey creation – from tracked session data to the most typical journeys*

First, we merged any grouping of several news steps (e.g. when the user switched from BBC News to Apple News) in a smartphone user session to capture the two steps before and after that news consumption instance.

Table 3. Sample profile		Stage 1: Smartphone News consumers		Stage 2: Smartphone users	
	<b>Total</b>	879	100%	1016	100%
<b>Age</b>	<b>16-24</b>	276	16%	320	16%
	<b>25-34</b>	183	19%	205	19%
	<b>35-44</b>	186	17%	215	17%
	<b>45-54</b>	132	18%	154	18%
	<b>55-64</b>	70	14%	85	14%
	<b>65+</b>	32	16%	37	16%
<b>Gender</b>	<b>Male</b>	358	48%	433	49%
	<b>Female</b>	521	52%	583	51%
<b>Social Grade</b>	<b>ABC1</b>	534	58%	599	57%
	<b>C2DE</b>	345	42%	417	43%
<b>Region</b>	<b>North (inc. Scotland)</b>	297	33%	337	33%
	<b>Midlands (inc. Wales)</b>	197	20%	235	21%
	<b>South</b>	385	47%	444	46%

A **session** is all smartphone activity from the moment a user engaged with their phone until 5-minutes of inactivity

Next, we created five-step journeys with news consumption as the middle-step. Any sessions ending or starting with news led to three-step journeys. Using these clear building blocks helped key website and app categories emerge as the most frequently associated with news consumption.

Once the key journeys for analysis were identified, we looked at the different journeys by domains (e.g. websites such as Google, Amazon) that fall under that pattern.

We chose the most frequent journeys split by domains that fall under the category patterns to take forward through to analysis. A total of 9 types of news journey were identified in stage 1. See table 4 for journey user sample sizes.

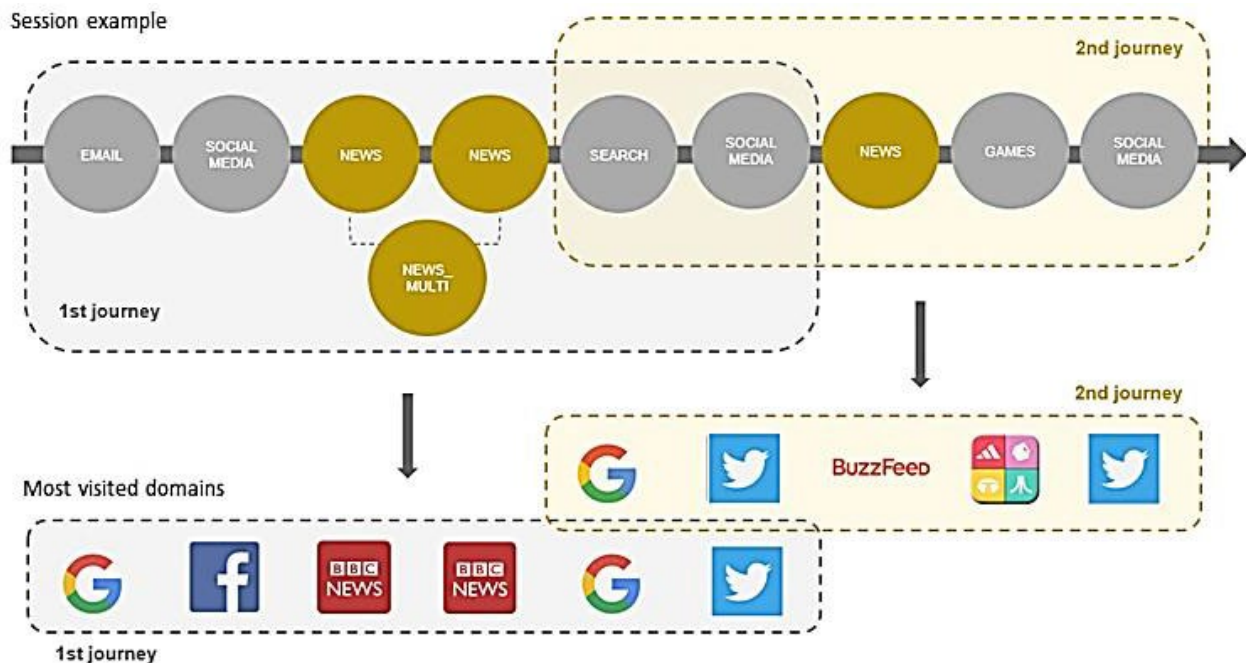


Figure 2. Journey creation



Table 4 shows the sample sizes of each of the 9 news journeys illustrated in Figure 1.

Table 4. Sample size of each type of news journey		
Function of journey	Dominant activity while on news journey	Number of users
<b>Info-Led</b>	Web browser: News dominant	80
	Web browser: Web Browser dominant	145
	News Grouping	50
	Search	79
<b>Social Media</b>	Instant Messenger	80
	Social Media	68
<b>Functional</b>	Location	35
<b>Entertainment</b>	Video Streaming	28
	<b>Total</b>	879

### How we determine engagement

Throughout the research we refer to the level of smartphone news engagement. This was measured using our behavioural data and a qualitative assessment of the journey. During a smartphone journey, the time an individual spent on news sources was recorded and used to determine how engaged they were with news. This assessment of engagement also considered the number of news sources users switched between: a lower number of news sources meant a higher engagement with the content from a particular news provider while switching between more sources meant less focused news consumption and lower engagement.

The quantitative definitions of engagement are as follows:



Figure 3. Levels of engagement

### Stage 2 – The ‘Who’

News journeys identified in stage 1 were added to GB TGI Clickstream and a smartphone-sample only version of the database was developed. Data was weighted to levels representative of the GB smartphone population to correct any imbalance in the demographic profile of respondents.

This database was then used to analyse typical consumers of the different news journeys identified in stage 1 in terms of their demographics, attitudes, media preferences, news consumption and relationship to the BBC.

### How we profiled news consumers

Characteristics reported on each of the news consumer profiles were selected based on high indexing and high penetrating data points to best discriminate one profile from the other i.e. we report on the largest and most likely characteristics found in a group, when compared to the average smartphone user.

Note: a person could have more than one type of digital news journey, as news consumption could vary by day of week, time of day, and journey purpose.



### *Understanding types of news consumption*

Findings from research undertaken by Revealing Reality on behalf of Ofcom as part of the BBC News and Current Affairs review were mapped across to our research where relevant, therefore providing a common language to refer to types of news consumption.



#### **Habitual consumption**

Habitual news consumption generally occurs around the same time of day or as part of a routine. These consumers generally stick to a few trusted news sources.



#### **Goal-driven consumption**

Goal-driven consumption occurs when the consumer is looking for a specific type of news or news story. The consumer is selective and has a higher engagement in the journey as they seek out the information.



#### **Incidental consumption**

Incidental news consumption may occur while the individual is engaged with something else on their smartphone (e.g. on social media). The consumer sees an article or notification, clicks through briefly and then carries on with their session.