

DIGIDAY



The state of publisher traffic:

Framing the evolution and impact
of search and referral in 2024



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This State of the Industry Report, sponsored by Arc XP, explores how publishers are affected by search and referral traffic, the traffic changes they've experienced in the past year, and what they expect will happen in 2024. Digiday and Arc XP surveyed 115 publishers to understand how these traffic shifts are affecting them and the steps they're taking to address challenges.

01

Introduction: Search and referral traffic 2023–24

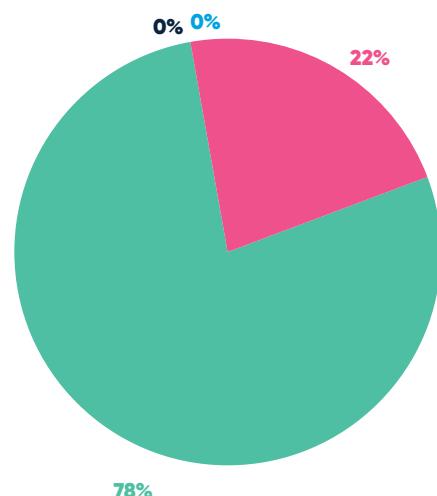
Publishers have faced many changes in recent years, ranging from shifting algorithms across social media platforms to the rise of generative AI and constant updates from Google – and now, the start of the first phase of the cookie's demise.

With this, publishers must address the shifts – and declines – in search and referral traffic. Search traffic, users directed to a publisher's site via search engines, has declined overall for most publishers, especially with Google's changes and consumer behavior shifts. In the same timeframe, referral traffic – users directed to publishers' sites via anything other than search engines (i.e., social media, news aggregators, etc.), has also fallen as several platforms make significant adjustments.

Overall, elements like these led to one clear outcome: 100% of our survey respondents said the state of search and referral traffic is of moderate to very significant concern.

Q. To what extent do you consider the state of search and referral traffic to be a concern in 2024?

- Very significant
- Moderately significant
- Not very significant
- Not at all significant



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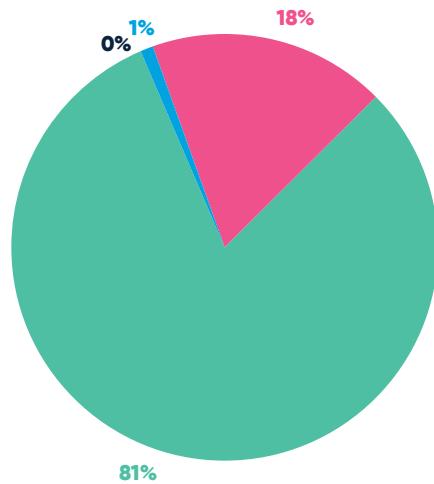
Factors impacting traffic shifts in 2023 included [declining referral traffic from Facebook](#), initially emanating from a bug unintentionally introduced during an algorithm update in May. While some had previously been experiencing declining traffic from the social platform, this update caused even steeper declines for many.

Another factor is that many platforms are incorporating AI or generative AI in their algorithms – offering users the ability to input short questions and receive a summarized response from an AI chatbot – which has resulted in traffic being diverted from publishers. For example, [according to a recent survey](#), Google introduced [AI-generated text in response to specific search queries](#), leading to decreased traffic for publishers and advertisers alike, including some losing as much as 95% of their Google Search traffic.

In our survey, 99% of our respondents said the impact of AI on search and referral traffic is of moderate to very significant concern.

Q. As AI increases in popularity among the general public, how does the technology rank as a concern regarding search/referral traffic?

- Very significant
- Moderately significant
- Not very significant
- Not at all significant



With these factors affecting publisher search and referral traffic in mind, the following sections will explore how publishers have been affected by traffic changes in the past year and what they expect will happen in 2024. This report will focus first on search traffic, then on referral, and then on strategies to respond to the search and referral scenarios described in the coming year.

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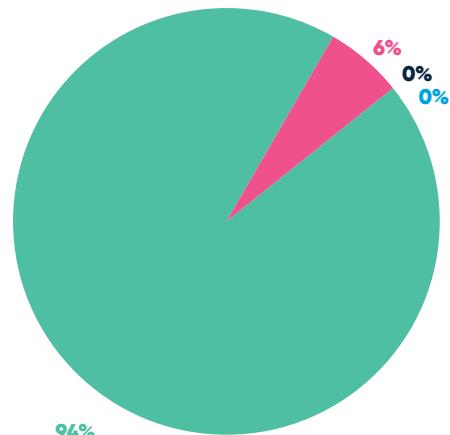
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Search traffic changes by channel in 2023

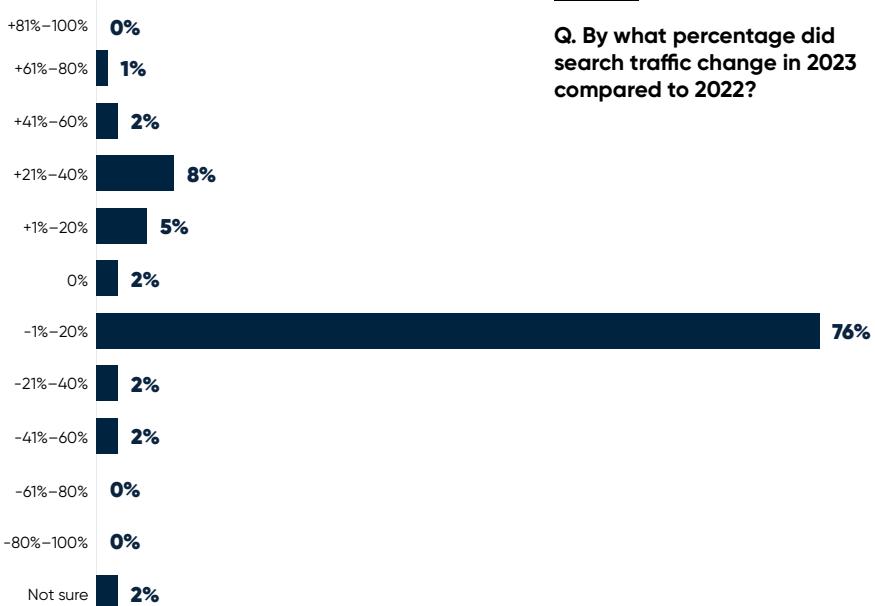
One thing is sure in 2024: search is a revenue driver. All our survey respondents said it was moderately to very significant to their annual outcomes.

**Q. To what extent does
search traffic impact your
annual revenue?**

- Very significant
- Moderately significant
- Not very significant
- Not at all significant



A significant majority (80%) said search traffic was down in 2023. Most (75%) characterized that decline as 1%–20% down from 2022. Of the 14% of respondents who measured some search traffic growth in 2024, most (8%) saw it in the 21%–40% range.

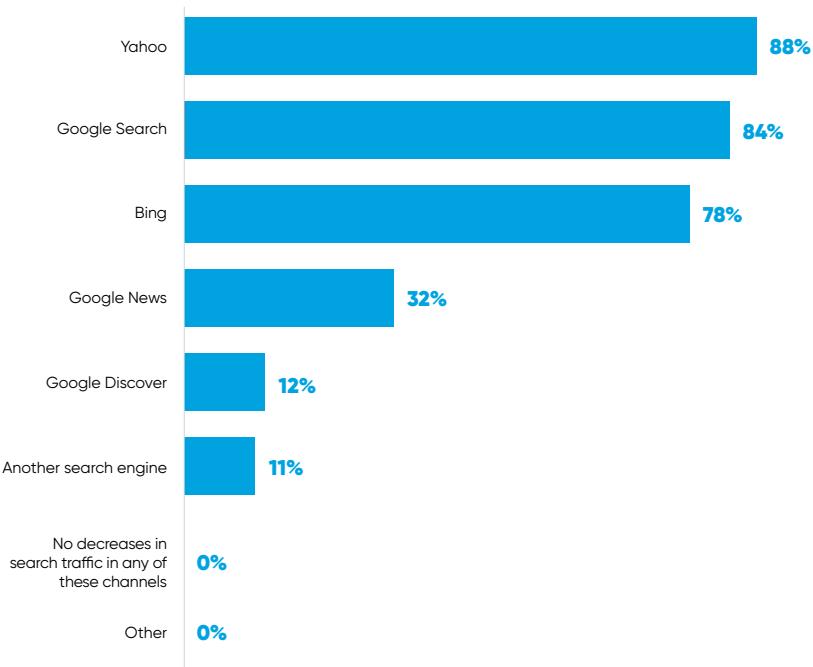


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To understand what's contributing to publishers' decreases, one factor is the search engines they rely on for organic and paid search traffic. Other factors include the channels that aren't performing well, what's changed and how publishers are working to overcome those shifts.

Yahoo (88%) and Google Search (84%) topped the list of search channels showing a decline in 2023 over 2022. Bing was the third most commonly cited channel for decrease – 78% said so.

Q. In which of the following channels have you seen a decline (or expect to see further decline) in search traffic? Select all that apply.



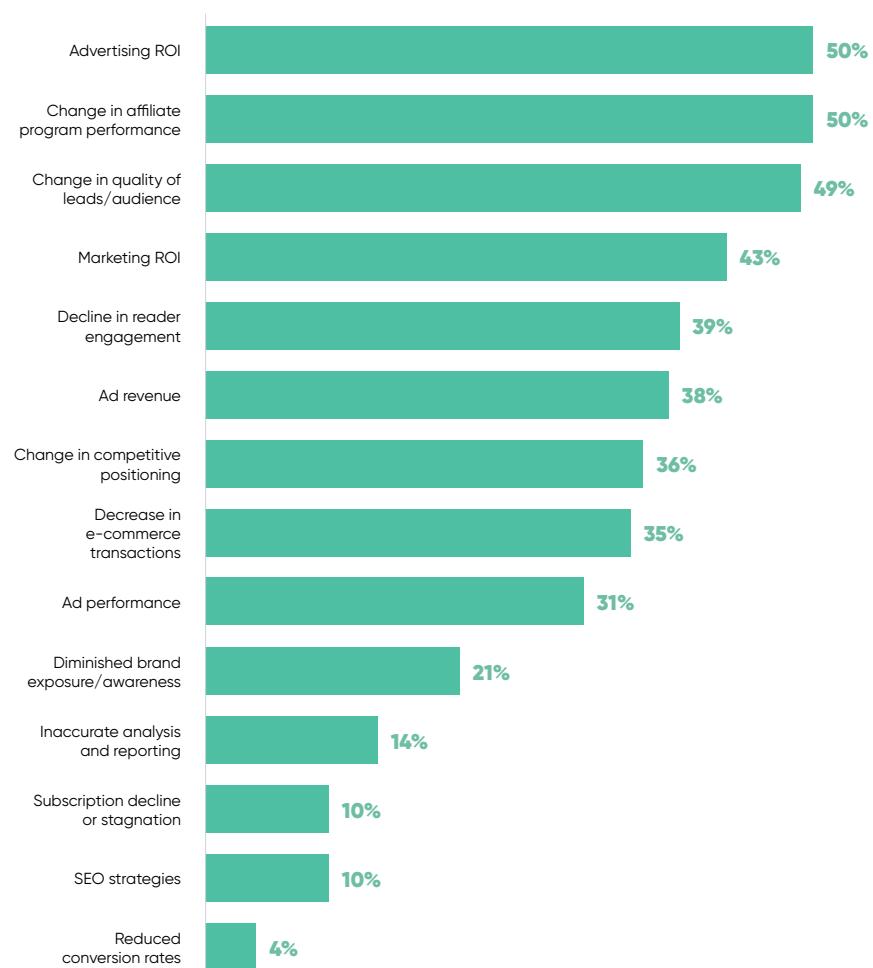
Some search declines are likely due to some of the AI-related changes mentioned in the previous section. One reason publishers have seen a decrease from Bing could be [Microsoft's introduction of ChatGPT into the search engine](#), much like Google introduced its own AI recently.

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Sara Carothers, Group Product Manager of experience at Arc XP, cites news fatigue as a reason for some of this decline. News fatigue drives down search overall as many seek to avoid reading negative news. Another trend she's seeing is people heading to TikTok and other social platforms to search for information, ushering in a new trend in how the public looks for information.

According to our respondents, the primary ways search traffic decline impacts revenue are advertising ROI and affiliate program performance – tied at 50%. In third place, at 49% – a virtual tie with first and second – is the quality of leads and audience. Marketing ROI held a close fourth place among impacts of declining search traffic at 44%.

Q. When search traffic declines, what other business areas are affected?
Select all that apply.



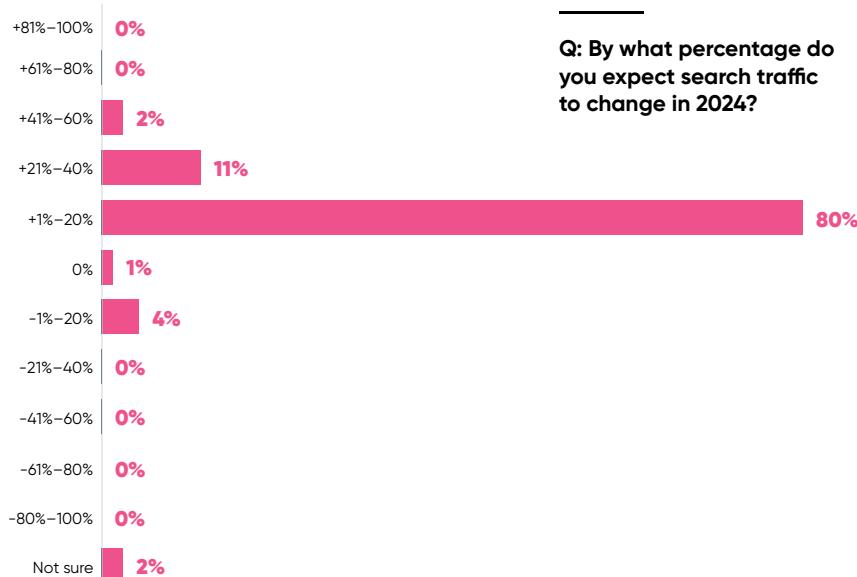
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03

Why publishers expect search traffic to rebound in 2024

While publishers have experienced decreasing search traffic over the past year, many factors this year are making them believe 2024 might be different.

There are signs of optimism, with 93% expecting search traffic to rebound by some amount in 2024, but most (80%) characterize that expectation as a modest improvement of 1%–20%.



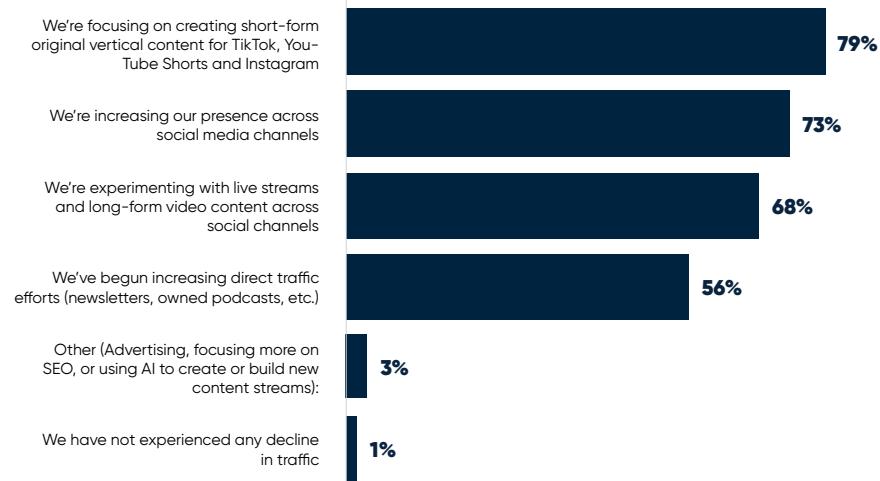
Carothers attributes this perspective shift partly to this being an election year but wants publishers to consider overall changes to how the internet works and how that's likely to affect traffic going forward.

"Reliably, though, numbers do go up a little bit in an election year because there is a lot more news happening," said Carothers. "But I think we'll still see a downward trend overall – I don't think we'll see the referral traffic be like it was in prior election years. I think we'll see a temporary bump. Things aren't going back to where they were a couple of years ago with the wider trends that are happening."

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Still, cautious optimism noted by publishers could stem from tactics they're implementing as search traffic decreases, namely, putting more attention on social media in the form of short-form original video content (79%) and generally showing up more in audience feeds (73%). Livestreams and longer-form videos also figure in their responses, coming in third at 68%.

Q. How has your team responded to decreased search traffic in the last 12 months?
Select all that apply.



Short-form video content capitalizes on the latest algorithm preferences of social media platforms, changing consumer behaviors and can often be an easier lift to create than other types of content. For example, some publishers [use short-form videos on TikTok or YouTube Shorts to break up longer content](#), such as a podcast, and then urge users to go to their site for the full podcast. This earns attention and drives traffic and interaction to the publishers' site.

Others are utilizing these platforms to distill quick news stories, gaining audience trust as a publication that makes the news easier to digest. This is winning them loyal subscribers and frequent traffic to their site.

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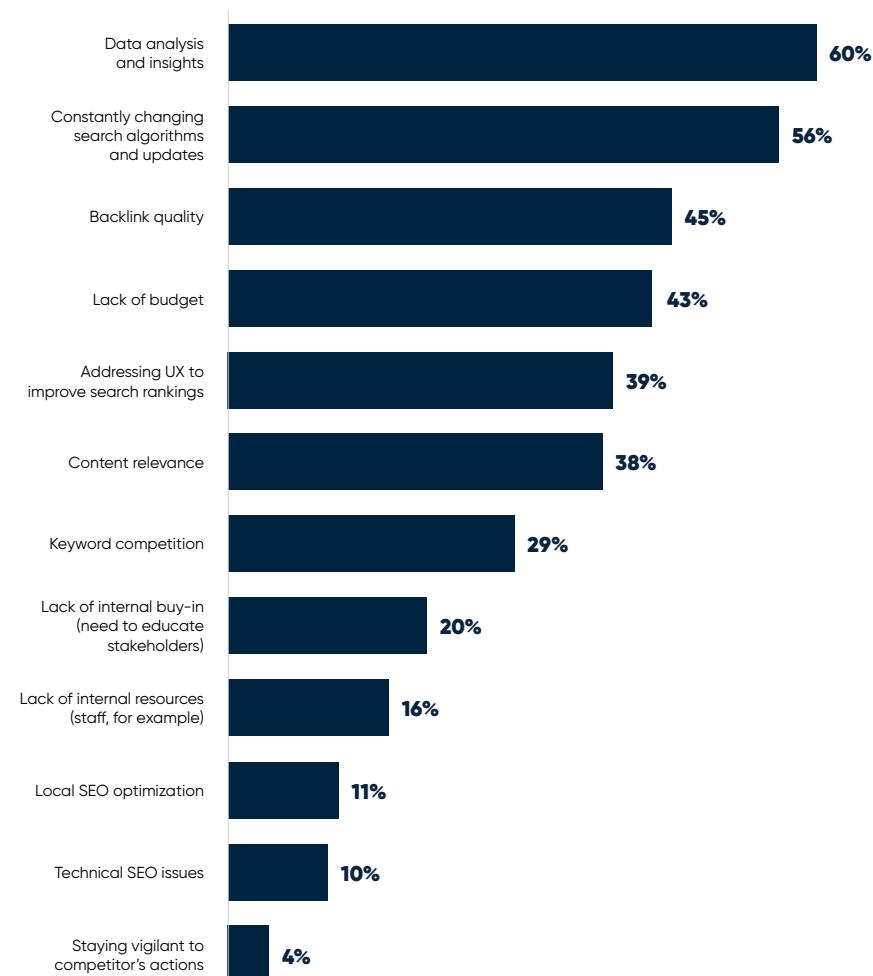
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Publishers' search-traffic challenges in focus

As publishers analyze their steps to rebuild search traffic, they encounter specific challenges and obstacles.

For example, the two top-cited challenges in 2024 are data analysis and insights (60%) and constantly changing search algorithms and updates (56%). The third place on their list is a virtual tie focused on the quality and quantity of backlinks (45%) and budgets (43%).

Q: What are your team's primary challenges around responding to declines in search traffic? Select all that apply.



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Between conducting thorough site audits, analyzing site analytics and server logs, and reviewing the UX and SERPs, diving into the data behind declining traffic can [require technical experts or bandwidth](#) the team may not have to spare.

Search engines such as [Google update algorithms 500–600 times a year](#). However, those incremental changes don't often significantly impact search rankings, while the significant changes they make each year do. One example is the Core Web Vitals update, which made fundamental changes requiring extensive work from teams to understand and optimize.

In previous years, search engines have placed the number of backlinks a site had above the quality of those links, but as algorithms have updated, that's now changed.

Best practices now involve publishing more helpful content that will help build relationships with other websites and industry experts to [earn natural, high-quality backlinks](#). However, another thing publishers need to consider – and something time-consuming, especially as many likely need to update past articles – is what search engines are evaluating: the relevance of the website being linked, the relevance of the anchor text used and the authority/reputability of that linked domain.

With many publishers facing decreased traffic overall, they're likely seeing less ad revenue than last year. This leads to budget cuts that make addressing crucial challenges even more difficult.



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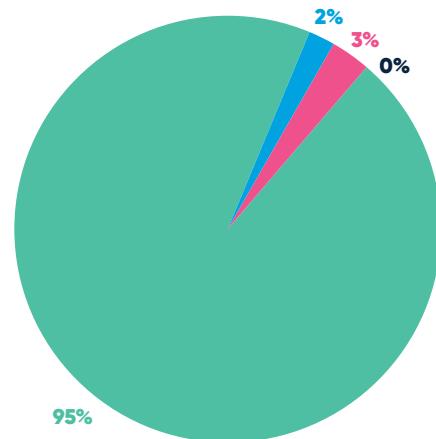
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Referral traffic shifts by channel in 2023

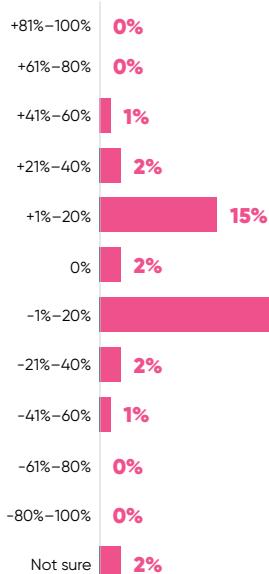
Like search, when it comes to annual revenue, referral traffic is moderately to very significant to most of our respondents (98%).

**Q. To what extent does
referral traffic impact your
yearly revenue?**

- Very significant
- Moderately significant
- Not very significant
- Not at all significant



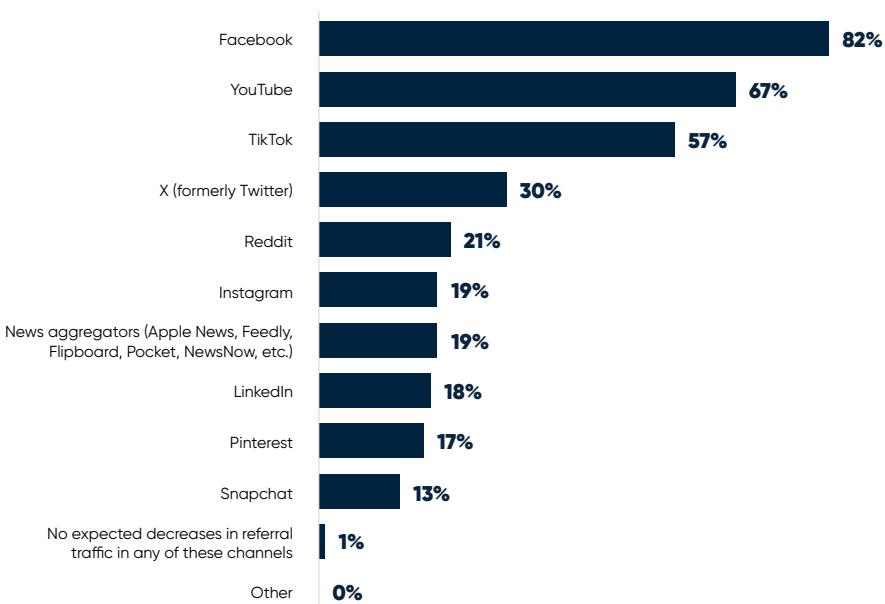
Referral traffic declined for our publishers in 2023. Seventy-eight percent of respondents saw referral traffic dip in 2023 over 2022, with 75% saying the decrease ranged from 1%–20% year over year.



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As for sources and channels where referral traffic decline can be pinpointed, Facebook held the top spot on our publisher respondents' list of channels, showing a decrease in 2023, with 82% selecting it. YouTube was second most cited at 67%, and TikTok was third at 57%.

Q. In which channels do you expect to see a decline (or further decline) in referral traffic? Select all that apply.



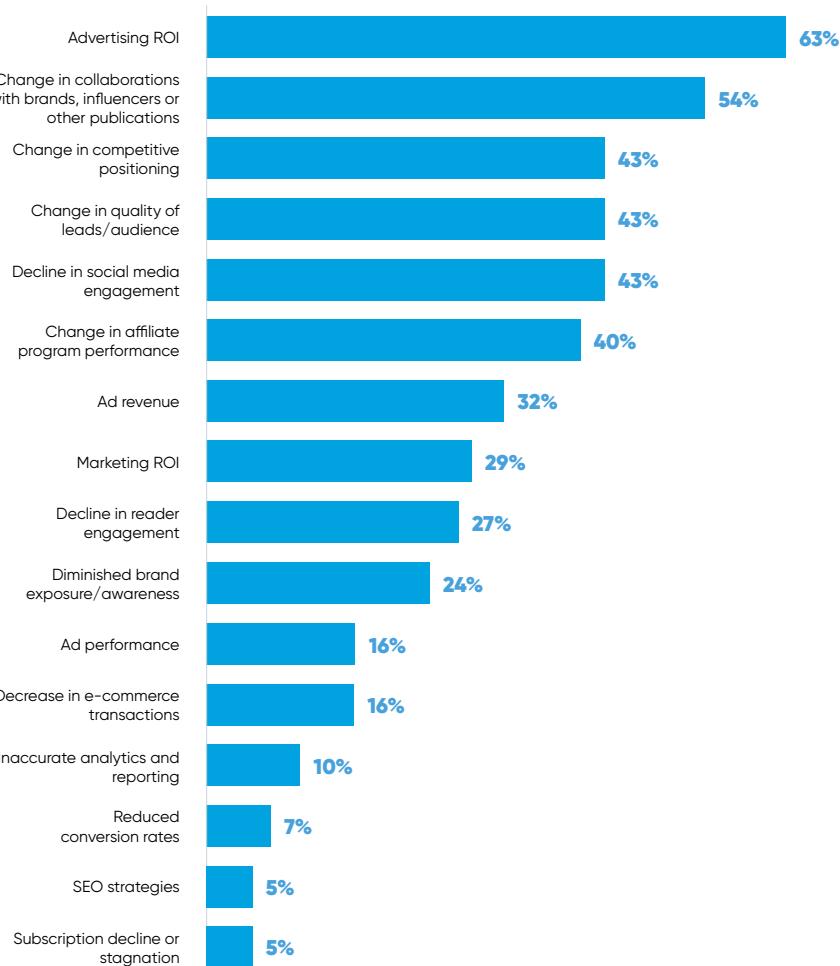
As for the reasons for specific channels showing signs of referral traffic decline, Carothers at Arc XP offers some insights.



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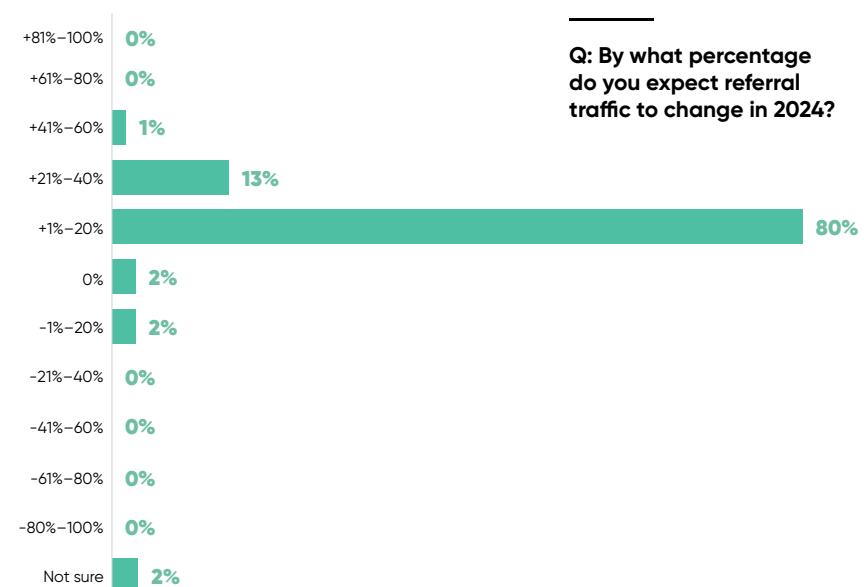
"As for social platforms, Meta, for example, said they're going to prioritize news content less on their platforms," she said. "And I think just last week they said on Instagram they're only going to show political content if you opt-in to it. So, on one hand, it's decisions made by the tech companies themselves that are putting less emphasis on news content and what they show their users. Naturally, you're going to get less traffic."

As for the impacts publishers see from declining referral traffic, advertising ROI topped the list at (64%). Changes in how our publisher respondents collaborate with brands, influencers and other publications came in second (54%), and how they position themselves competitively was third on their list (44%).

**Q. When referral traffic declines, what other business areas are affected?
Select all that apply.**


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Most respondents (95%) expect referral traffic to rise in 2024. As with search traffic, most of the publishers in the survey expect the increase to range from 1%–20%; 80% said so.

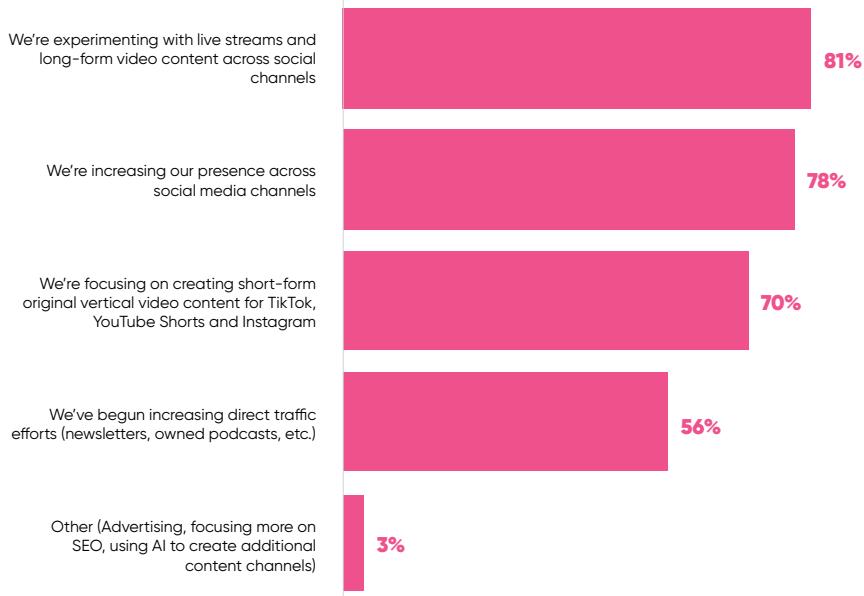


However, as with search traffic, Carothers cautions that referral traffic will likely experience a conservative rebound in 2024.

"It's unlikely that referral traffic will return to the way it was anytime soon," she said. "Besides optimizing their site experience, they need to think about the value they provide that another site can't. Otherwise, I think there are just industrywide trends that are going to prevent the referral traffic from climbing back to where it once was."

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Regarding how publishers respond to referral traffic declines, showing up more often in social media feeds topped their list of tactics (78%). Video is also crucial in their response, focusing on longer-form and livestream approaches (80%). By comparison, shorter-form videos on specific platforms such as TikTok, YouTube Shorts and Instagram were third on the list of referral traffic responses at 70%.

Q. How has your team responded to decreased referral traffic in the last 12 months?

Long-form videos allow publishers more control over monetization than the short-form videos they create for social. This format will enable publishers to offer more in-depth reporting and interviews and explore documentaries, keeping readers on the site longer and coming back with a proven track record [in the customer engagement department](#).

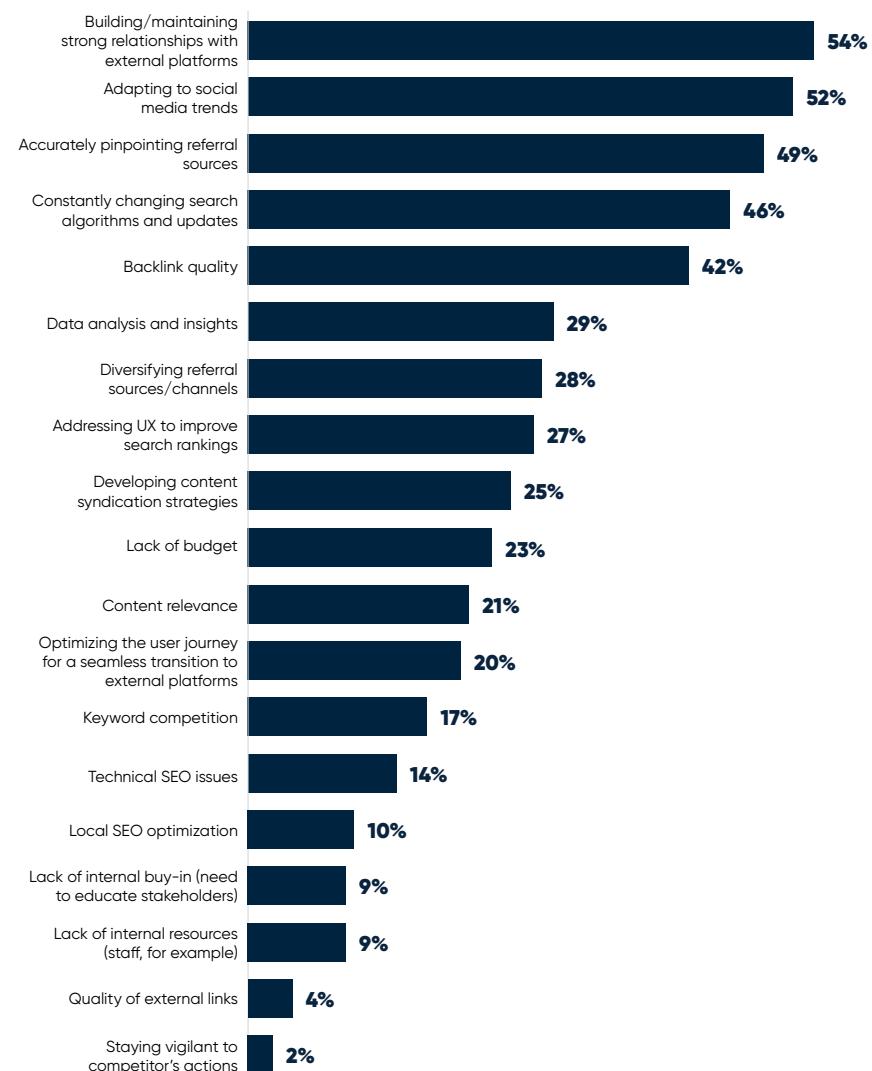
However, there is a caveat to consider when it comes to video.

"Publishers have been burned before by being convinced to pivot to video," Carothers said. "They should be cautious and think hard about what they're getting out of it. Are they going to get advertising revenue directly from the videos, which is more possible on their own site? They should be viewing it as a funnel to build that relationship with people and get them onto a platform where they can have a direct connection instead of being completely reliant on the social platform that doesn't bring them money."

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What's keeping their expectations around referral traffic improvement from looking stronger for our publisher respondents may have to do with two top-cited challenges in 2024: creating strong relationships with external platforms (54%) and shifting social media trends (52%). Like their search-traffic challenges, everchanging algorithms ranked third on our respondents' list at 46%.

Q: What are your team's primary challenges around responding to declines in referral traffic? Select all that apply.



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The top-cited challenge likely concerns publishers who rely on large tech platforms to circulate their content. As these platforms (Meta, Google, etc.) continue to announce significant news-related changes that harm many publishers' chances of their content being seen, they're [struggling to find ways to use these platforms to their benefit](#) while hedging against the risks they know are associated.

The second challenge, shifting social media trends, requires constant monitoring, planning and experimentation. Teams typically need enough staff and bandwidth to support such regular deep dives. In the meantime, publishers are focusing on short-form content on platforms such as [TikTok to reach new audiences with enticing, snappy content](#).



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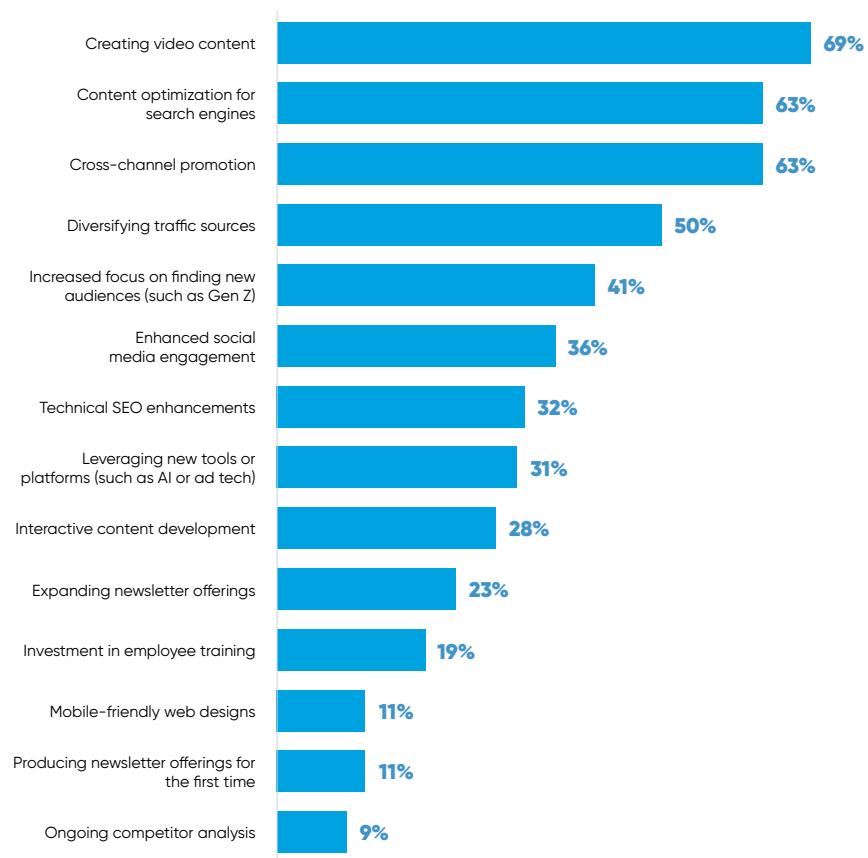
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Strategic plans: How publishers are approaching 2024 (and beyond)

Beyond an emphasis on video, which tops the list at 69%, our publisher respondents' strategic priorities for mitigating the impact of traffic decline include cross-channel promotion and content optimization for search engines – 63%, respectively.

Also of note is their strategic attention to traffic diversification at 50%.

Q. What are your team's priorities for 2024 to help mitigate decreases in traffic? Select all that apply.



To tackle several of these priorities simultaneously, publishers could explore content syndication that can increase traffic, site visibility, SERP rankings, generate backlinks and more.

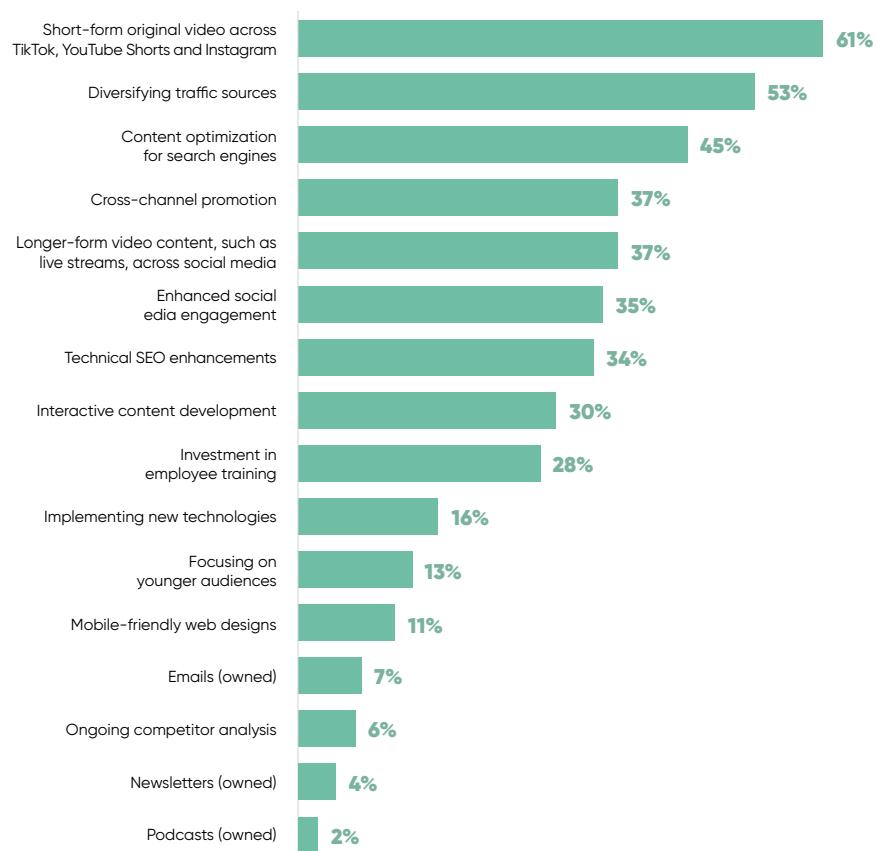
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Some syndication platforms, such as news aggregators, only post an excerpt of an article and link to the publisher's site for the entire piece, further driving publisher traffic. In addition to syndicating articles, publishers can syndicate other original content they've created, such as videos, podcasts, etc., to increase reach, rankings, traffic and engagement.

"Something like Apple News is at least a little less subject to some of the trends we've mentioned," Carothers said. "If someone is paying for Apple News, they are interested – they've opted into wanting to learn information about the world and maybe are feeling less of the news fatigue. At the end of the day, there will still be competition for what a user sees in Apple News, but so far, it's been steadier than traffic coming from search and social platforms."

Most algorithms now prioritize video content, which can increase a publisher's viewability, improve social media presence, boost referral traffic and more.

Q. What strategies do you predict will be the most significant in improving site traffic results? Select all that apply.

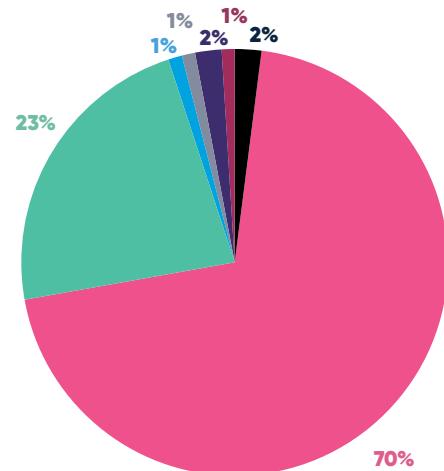


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While many respondents indicated they plan to increase their time on social platforms, Carothers suggests it's a time to be cautious about investing in any platform a publisher doesn't own and have control over. As AI continues infiltrating these platforms, that should be even more top-of-mind as 71% of publishers say they've taken steps to address the impact of the newest iterations of artificial intelligence on their traffic within the past six months.

**Q. Has your team taken
any action to address AI/
generative AI's impact on
traffic?**

- Yes, within the last quarter
- Yes, within the last half-year
- Yes, within the last year
- No, but plan to within the next quarter
- No, but plan to within the next half-year
- No, but plan to within the next year
- No plans at this time



Earlier this year, OpenAI created an app store, GPT Store, for developers to share custom chatbots using ChatGPT. While publishers haven't yet rushed to embrace this new feature, The GPT Store presents a [potential new platform for referral traffic](#) through these custom GPTs.

Carothers suggests publishers consider why people visit their site directly instead of relying on top Google Search results or a social media algorithm feed.

"What's most at risk is something AI can already write about pretty correctly and reliably, or it's information that's already out there," she said. "But AI can't report new information – you still need a human to do that – so that's what I'd be thinking about to convince readers to come directly to us instead of going back to Google."

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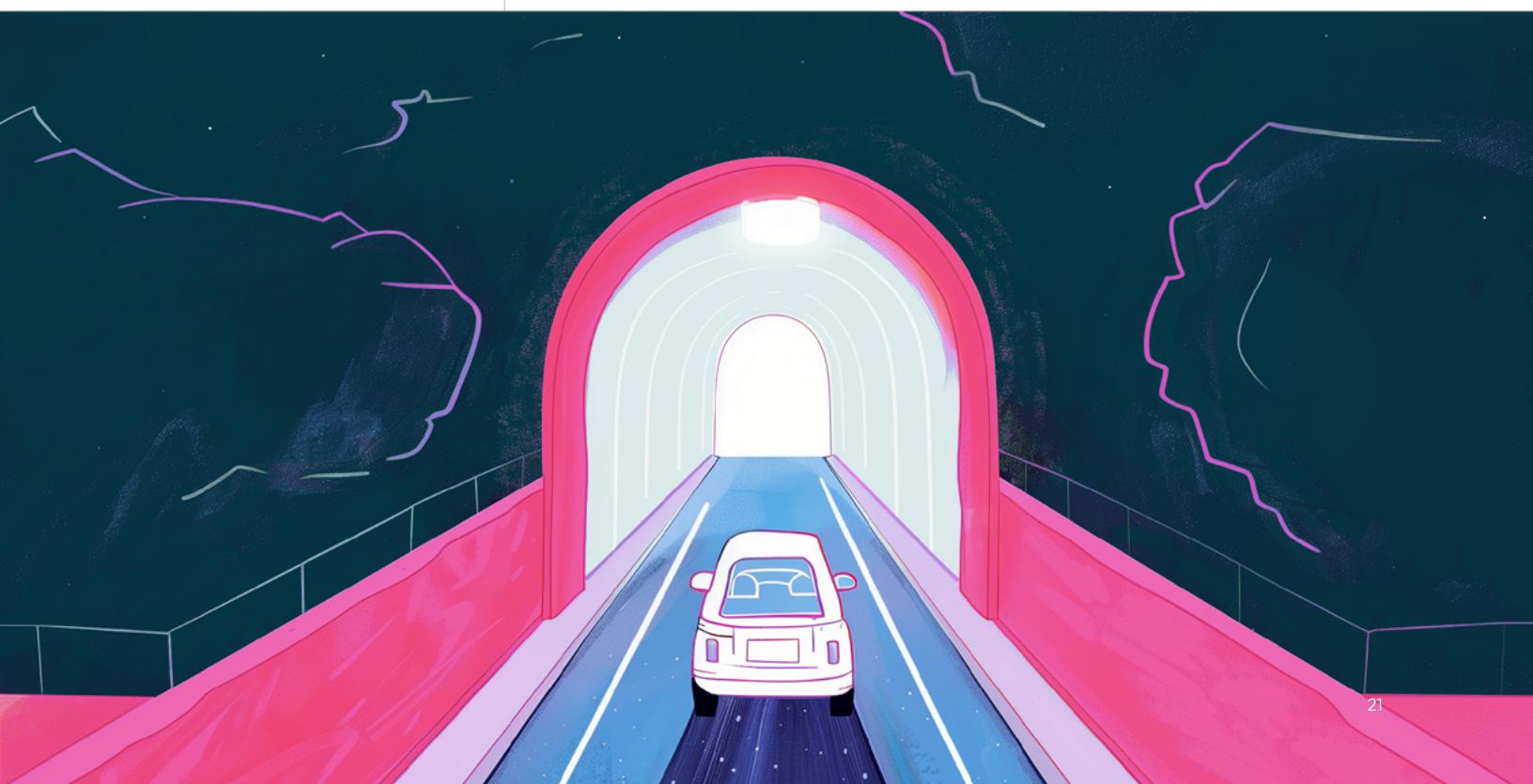
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Other publishers are moving away from SEO-optimized content entirely. Lifestyle publishers like BDG prioritize personal takes and original stories, avoiding search-based stories that ChatGPT or other generative AI technologies can create.

"We don't want to be doing those stories," said Emma Rosenblum, Chief Content Officer at Bustle Digital Group, [in a recent Digiday article](#). "That utility that we provide is going to disappear so quickly. And I'm glad because we hate doing stuff like that. All the things that a computer could not replicate is where we're going to put our money."

As publishers evaluate the traffic shifts they've experienced and anticipate for 2024, they prioritize organic, owned content, primarily video. However, as experts in the report note, publishers must be cautious about investing in platforms they don't own and perhaps pivot to hosting video content on their site and teasing that content across short-form social media posts.

While some shifts, such as search engine updates and social media algorithm changes, are expected to continue, at least for now, establishing direct connections with readers is vital amid this uncertainty. Publishers that account for these acknowledge that they are essential factors in their strategies for success.



About Arc XP

Arc XP is the content platform built to power sophisticated storytelling and content distribution at brands with big stories to tell. Our integrated ecosystem of purpose-built tools delivers increased content velocity, best-in-class site experiences, and a modern software-as-a-service platform that empowers customers to prioritize innovation and growth at any scale. Originally developed for The Washington Post, today Arc XP is trusted by media and enterprise brands across the globe – powering thousands of websites in more than 25 countries.

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