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Exploring attitudes towards online intermediaries and the importance of media plurality

Quantitative Technical Report

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Ipsos

Introduction

The news market in the UK has changed rapidly, with a significant increase in the amount of news available online. Within this evolving context, Ofcom launched a programme of work to understand what impact changes in the market might mean for media plurality. Currently, Ofcom has statutory duties to secure and maintain a sufficient plurality of providers of different TV and radio services. These rules do not cover online intermediaries. Ofcom has identified three features not currently captured under the existing regulatory framework that may present a risk to media plurality:

- Online intermediaries and their algorithms control the prominence they give to different news sources and stories.
- The basis on which online intermediaries serve news via their algorithms is not sufficiently transparent.
- Consumers do not always critically engage with the accuracy and partiality of online news.

As part of this work, Ofcom commissioned Ipsos UK to conduct quantitative research to help it understand public awareness of online intermediaries, attitudes towards online intermediaries, and the impact of online intermediaries on news consumption habits. This report details the methodology and technical specification of this study.

Definitions

Algorithm: – a process or set of rules to be followed in calculations or other problem-solving operations, especially by a computer.

Choice architecture: – the design of different ways in which choices can be presented to users, and the impact of that presentation on decision-making.

Critical engagement: – how news users interact with the news, including their ability to judge the veracity of news.

Media plurality: -– this is defined by Ofcom as: i) ensuring that there is diversity in the viewpoints that are available and consumed, across and within media enterprises; and ii) preventing any one media owner, or voice, having too much influence over public opinion and the political agenda. Media plurality ensures that individual media organisations cannot have too much influence over public opinion or control the news agenda.

News aggregator: -– a type of online intermediary, such as Apple News and Google News, that creates a ‘digital newspaper’ by aggregating news articles from many publishers into one location.

Online intermediaries (OIs): -– services which operate between a publisher of a news article and the reader that have an influence over the news seen. There are three types of online intermediaries covered by this research: search engines, news aggregators and social media.

Search engines: -– websites or apps which help people find news online e.g. Google, Bing and Yahoo.

Social media: -– websites or apps where news is posted, shared and discussed online among networks of users e.g. Facebook or Twitter.

Methodology

There were three parts to the research:

1. The collection and analysis of **public behaviour data**, collected passively from a representative sample of the UK adult population, and focused specifically on news consumption habits. Data was collected using Ipsos iris, Ipsos' state of the art proprietary passive measurement panel.

2. An online survey of those that agreed to the passive measurement of their online behaviour. A total of **1,074** participants took part in this survey.

3. An online survey of a nationally representative sample of UK adults. A total of **1,483** participants took part in this survey.

The primary purpose of parts one and two was to allow for triangulation between claimed news consumption behaviour with real online behaviour, and to allow for investigations across the two. The purpose of part three was to boost the overall sample size available for analysis of the survey dataset, and to provide a results baseline. Both groups were shown the same questionnaire.

Fieldwork took place in July and August 2022, collection of the public behaviour data took place between the **1st July and 31st July 2022,** with the survey of those that had agreed to passive measurement of their online behaviour taking place between **3rd August and 22nd August 2022**, and the nationally representative survey of UK adults taking place between **19th July and 16th August 2022**.

The questionnaire consisted of 94 questions, with an average (median) length of 18 minutes and an average (mean) length of 26 minutes. It covered a variety of topics, including:

- Demographics (age, gender, region, education, etc)
- Attitudes towards technology and public institutions
- Consumption of news (as recalled by the participant, including online and offline news)
- Attitudes towards the principles of media plurality
- Awareness of and attitudes towards online intermediaries
- Critical engagement with online news content
- Citizens knowledge quiz
- Political polarisation (attitudes towards people of opposite views)

For each survey quotas were set to achieve a representative sample of the UK adult population by age, gender, region, social grade and education. The below table shows the quotas set for this project, and final unweighted and weighted data. Data was weighted using a mix of propensity weights and weights to account for any shortfall in quotas. For this reason, weighted data does not always match the quotas set during fieldwork (*for further information about the process used to merge the data see 'merging of datasets' below*).

Demographic	**Quota set**	**Interviews achieved** ***(survey of those that agreed to passive measurement)***		**Interviews achieved** ***(survey of UK adults)***	
		Unweighted	*Weighted*	*Unweighted*	*Weighted*
Gender: Male	49%	52%	54%	44%	45%
Gender: Female	51%	47%	46%	55%	54%

Age: 16-24	14%	7%	9%	14%	17%
Age: 25-44	33%	31%	30%	36%	32%
Age: 45-54	17%	21%	20%	15%	16%
Age: 55-74	25%	34%	29%	29%	26%
Age: 75+	10%	7%	11%	6%	10%
Social grade: AB	22%	33%	22%	25%	17%
Social grade: C1	30%	23%	27%	29%	33%
Social grade: C2	22%	14%	22%	16%	24%
Social grade: DE	26%	30%	28%	29%	26%
Region: North-West	9%	10%	12%	8%	9%
Region: North East and Cumbria	4%	5%	5%	4%	4%
Region: Yorkshire & Lincolnshire	7%	9%	11%	7%	7%
Region: London	17%	13%	17%	16%	18%
Region: South	7%	8%	7%	7%	9%
Region: South East	3%	3%	3%	3%	5%
Region: East	6%	6%	6%	6%	10%
Region: West	3%	4%	5%	3%	3%
Region: South West	2%	3%	4%	2%	3%
Region: Midlands East	3%	3%	3%	3%	4%
Region: Midlands West	8%	7%	8%	8%	9%
Region: Wales	10%	12%	5%	10%	4%
Region: Scotland	10%	8%	6%	10%	9%
Region: Northern Ireland	10%	5%	2%	10%	4%
Education: Graduate	30%	54%	37%	35%	25%
Education: Non-graduate	70%	46%	63%	64%	75%

Data processing

Standard quality checks on the data were conducted prior to data processing including reviewing the data for duplicate responses, ‘speedsters’ (participants that completed the survey too quickly to be considered a ‘real’ response) and straight lining (participants that gave the same or similar answers to multiple questions, or contradictory answers to similar questions).

Once fieldwork closed for both the surveys a set of cross-tabulation tables were produced, which displayed each question at a total sample level as well as analysed by cross-breaks. All tables were thoroughly checked to ensure they had been setup correctly.

Additional analysis of the online behaviour data was conducted, meaning further processing was required of this dataset. This included:

- For all requested news brands and sites containing the keyword ‘news’, the URL’s and apps were extracted from the iris sample.

- Summary statistics were run, which included identifying hit counts, number of unique participants, counts per domain and most visited sites. Other data explorations were run, which consisted of exploring data in small random samples.

- Data was re-shaped by extracting features such as 'channel name' from the 'web domain' names in the data. The 'channel names' from the list of news sources requested were extracted from variables such as the website page domain, app name and bundle ID (Apple product identifier). Given data was being collected across apps and websites, the data had to be merged into a single dataset. This required standardizing both datasets given the slight differences in how the data looks for apps and websites. For example, apps do not have any endpoint URL so the AppName was matched up to align with the website domain. A similar approach was taken when the passive data was merged with the survey data.

Merging of datasets

The data presented in the final report is a merged dataset containing data from both surveys. Prior to combining the data sets for the two surveys, several rounds of analysis were conducted to check the validity of this approach.

Firstly, the two surveys were reviewed for differences in key demographics, including but not limited to: gender, age, socio-economic group, and education. Differences in profile were accounted for in the final weight scheme agreed.

Secondly, a logistic regression was run to identify key variables that distinguished participants that had agreed to passive measurement from participants in the nationally representative survey. A propensity weight was calculated based on the probability scores derived from the logistic regression and used as a pre-weight before additional weighting was applied to correct for demographic differences. Several iterations of the logistic regression were run to minimise the error in the distribution of responses between the two datasets. This included running different variable selection procedures, identifying statistically significant variables, and running multiple propensity weighting schemes.

Guide to statistical reliability

The variation between the results of the survey samples and the 'true' values (the findings that would have been obtained if everyone had been interviewed) can be predicted from the sample sizes on which the results are based, and on the number of times a particular answer is given. The confidence with which we can make this prediction is usually chosen to be 95%, that is, the chances are 95 in 100 that the 'true' value will fall within a specified range.

The table below shows the required ranges for percentage results in this research at the 95% confidence level. In this example, we can be 95% confident that the true value is +/-1.5 percentage points for a survey value of 10%.

Effective sample size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1,607	+/-1.5%	+/-2%	+/-2.2%	+/-2.4%	+/-2.4%

Our standards and accreditations

Ipsos' standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a "right first time" approach throughout our organisation.

ISO 20252

This is the international market research specific standard that supersedes BS 7911/MRQSA and incorporates IQCS (Interviewer Quality Control Scheme). It covers the five stages of a Market Research project. Ipsos was the first company in the world to gain this accreditation.

Market Research Society (MRS) Company Partnership

By being an MRS Company Partner, Ipsos endorses and supports the core MRS brand values of professionalism, research excellence and business effectiveness, and commits to comply with the MRS Code of Conduct throughout the organisation. We were the first company to sign up to the requirements and self-regulation of the MRS Code. More than 350 companies have followed our lead.

ISO 9001

This is the international general company standard with a focus on continual improvement through quality management systems. In 1994, we became one of the early adopters of the ISO 9001 business standard.

ISO 27001

This is the international standard for information security, designed to ensure the selection of adequate and proportionate security controls. Ipsos was the first research company in the UK to be awarded this in August 2008.

The UK General Data Protection Regulation (GDPR) and the UK Data Protection Act (DPA) 2018

Ipsos is required to comply with the UK GDPR and the UK DPA. It covers the processing of personal data and the protection of privacy.

HMG Cyber Essentials

This is a government-backed scheme and a key deliverable of the UK's National Cyber Security Programme. Ipsos was assessment-validated for Cyber Essentials certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the internet.

Fair Data

Ipsos is signed up as a "Fair Data" company, agreeing to adhere to 10 core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.

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