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# Diversity of Content Online: Public Perceptions and Awareness in Canada and Abroad

## Canadian and International Findings

### **Executive Summary**

Prepared for the Department of Canadian Heritage

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Ce rapport est aussi disponible en français

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This public opinion research report presents the results of four online focus groups and two online surveys conducted by Ipsos Public Affairs on behalf of the Department of Canadian Heritage.

Four 90-minute online focus groups were carried out members of the Canadian public aged 18+ years who used digital platforms (social media and digital content) in order to consume news and cultural content. A total of 32 participants took part. Three online focus groups were conducted in English and one session was conducted in French. All qualitative fieldwork was conducted between December 16-21, 2020.

The first survey was conducted with 2,006 Canadians aged 18+ years between February 5-11, 2021.

The second survey was conducted between February 23 and March 9, 2021 among 3,201 respondents aged 18+ years living in Australia (n=800), Finland (n=800), France (n=800), and Germany (n=801).

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# EXECUTIVE SUMMARY

## 1 Research Purposes and Objectives

The main research objectives of the public opinion research include, but are not necessarily limited to, the following:

- Citizens' perceptions and awareness of the impact of algorithms on their access and exposure to a diversity of content, including local content.
- Citizens' perceptions of the impact of algorithms on their exposure to news and information, with an emphasis on the diversity of points of view offered through online content.
- Citizens' perceptions of the impact of online content on their democratic rights (i.e., freedom of expression, freedom of opinion, right to participate in cultural life of the community, right to participate in government).
- Citizens' satisfaction with respect to the diversity of content recommended to them through digital platforms' algorithms.
- Citizens' interactions with content (i.e., algorithm-driven content consumption (programmed) vs. user-driven consumption (i.e. organic, or active searches), use of networks (social media)).
- Comparisons with awareness, perceptions, and satisfaction across the populations in Australia, Finland, France and Germany with respect to the diversity of content recommended to them through digital platforms' algorithms, for comparison purposes

## 2 Methodology

In **Phase 1**, Ipsos conducted a series of four, ninety-minute online focus groups with members of the Canadian public (aged 18+) who used digital platforms (social media and digital content) to consume news and cultural content. Special screener questions were used to ensure a range of gender, ages, ethnicity, academic and socio-economic attainment in each session.

In each session, Ipsos recruited 10 participants to ensure 8 attended; a total of 32 participants took part in the qualitative research. Three online focus groups were conducted in English and one session was conducted in French. All qualitative fieldwork was conducted between December 16- 21, 2020.

In **Phase 2**, Ipsos carried out a quantitative survey consisting of a series of closed- and open-ended questions designed in consultation with the Department of Canadian Heritage. The survey was offered in both official languages in Canada and 2,006 responses from adults aged 18+ years were collected from February 5-11, 2021. The average length of interview was 13 minutes. Respondents to the survey were drawn from Ipsos' online panel sample sources making it a non-probability sample.

In **Phase 3**, a survey instrument similar to that in Phase 2 was used. A total of n=5,207 responses were collected from adults aged 18+ living in Australia (n=800), Finland (n=800), France (n=800), and Germany (n=801). The interviews took place between February 23 and March 9, 2021, with an average interview length of 13 minutes. Respondents to the survey were drawn from online panel sample sources, thereby making it a non-probability sample.

## 3 Key Findings

The results of the focus groups in **Phase 1 (qualitative research)** were used to form the basis for the research instruments to be used in Phases 2 and 3. Participants suggested that when it comes to deciding what types of online content to access, they take into account a number of considerations: ease of use/access, predetermined preferences,

information provided through trusted sources, information that is trending or topical, and information provided proactively by the various platforms they access. Participants expressed mixed views on algorithms, recognizing both the benefits and limitations offered. Most are confident in their ability to make informed decisions with regards to content consumed online. Access to diverse content online is typically seen as a shared responsibility between users, ISPs, platforms and government.

**Phase 2 (Canadian research)** took many of these qualitative findings and viewed them through a public opinion lens. More specifically, Canadians place a high priority on their online content being truthful and from a trustworthy source. However, they are not overwhelmingly satisfied with their online experience. While a majority are satisfied that online content matches their interests, fewer feel satisfied when considering the availability of content that offers different points of view. Further, only half of Canadians are satisfied with the accuracy of information they find online, with even fewer being satisfied with the accuracy of suggested content. While Canadians say they are mostly going online to be informed, there seems to be a blurring of where to find “information” and where to find “entertainment” as Canadians cite similar sources as their most frequented sources for both informational and entertainment purposes.

Regarding algorithms, half of Canadians surveyed indicate that they have heard of the term “online algorithm” when presented with just the term and no definition. However, far fewer could provide a description of what one is or how one works when asked. Even when presented with a definition of an algorithm, less than 4 in 10 say they are knowledgeable in some way about online algorithms, and even those who say they have heard of the term “online algorithm” do not know that much about them. When thinking about who should be responsible for supporting journalists and news publishers whose content is reproduced on social media, Canadians have mixed views. They do not attribute responsibility to any specific body or industry, but rather believe that responsibility for compensating journalists and news publishers should be divided among online platforms, social media platforms, and the government in some way.

**Phase 3 (international research)** took the findings of the Canadian research and posed the same questions to respondents living in Australia, Finland, France, and Germany. Putting the Canadian data into perspective, the results show that trustworthiness of the source is a priority for respondents in all countries. Factuality and truthfulness of online content ranked as important for most, but not all respondents from all countries. Furthermore, respondents are not overwhelmingly satisfied with any aspect of the discoverability and availability of online content.

There are also global parallels between the sources that respondents are using for their information and entertainment in all countries. Except for respondents in Finland, no more than four in ten respondents in the countries surveyed say they are knowledgeable about algorithms. Finnish respondents are the most confident in their knowledge. All polled countries consider the task of financially supporting journalists and news publishers a shared responsibility. No country attributes this duty to a specific body or industry but indicate that this should be a task shared across governments, and internet and social media platforms.

## 4 Limitations of the Research

Regarding the **Phase 1** findings, it is important to note that the findings are qualitative in nature and do not result from a representative quantitative research methodology. As such, these findings are not to be extrapolated to the broader Canadian population. Rather, they should be considered directional in nature and are intended to provide broad thematic and insight-driven outcomes. Any conclusions drawn and opinions expressed are those of the researchers.

Regarding **Phases 2 and 3**, due to the non-probabilistic nature of the research, one limitation to the sampling method is that the results cannot be extrapolated to the rest of the Australian/Canadian/Finnish/French/German population. However, online panel surveys like the one conducted, are commonly used in the public opinion and market research industry and provide useful insights on the knowledge and opinion of the population, as the samples are designed to be representative of the population, regionally, demographically and socio-economically.

Quotas and weighting were employed to ensure that each sample's composition reflects the characteristics of the latest census data for each country. In general, the sample group was weighted by age, gender, region, and level of formal education.

## **5 Use of the Results**

The Government of Canada is leading an international initiative on diversity of content online. The notion is, citizens that are exposed to diverse sources and types of content, should be better equipped to fully participate in public debates. As citizens increasingly consume their news and cultural content through digital platforms, this online ecosystem brings different challenges such as the phenomenon of filter bubbles whereby citizens are only exposed to a limited range of information and points of view. A potential consequence of this reduced diversity is to negatively impact the quality of democratic participation in public debates.

The first goal of the initiative is to adopt guiding principles on diversity of content that will in turn provide a normative foundation for identifying concrete actions to be taken by relevant stakeholders, from civil society, private, and public sectors. A multi-stakeholder working group has been created to draft the guiding principles. These guiding principles will set high-level expectations and frame policy development initiatives around the following four themes:

- Access and discoverability of local and national content;
- Remuneration and economic sustainability of content creators;
- Access to diverse and reliable sources of information, including local news;
- Transparency relative to the impact of algorithms on access and exposure to diverse content.

Like-minded countries are involved in collaborative policy development initiatives aimed at better understanding the issues at play and identifying potential interventions in this space. At the moment, Australia, Canada, Finland, France and Germany are pursuing a collaborative research agenda on multiple fronts, one of which is the need to develop a performance measurement framework that is uniquely tailored to the multiple aspects of the diversity of content file, using existing indicators and measurements as appropriate, and identify gaps that will need to be addressed.

To complement this research agenda, the Department of Canadian Heritage undertook public opinion research to inform the development and tracking of indicators for measuring Canadian citizens' perceptions regarding the diversity of content they consume and are exposed to online, primarily through online intermediaries (i.e. Facebook, YouTube, Twitter).

Many elements of the diversity of content policy issue are not yet clearly supported by evidence and data. Among the data gaps, there is very little data relative to perceptions and awareness of citizens on the impact of algorithms over their access and exposure to diverse content, as well as their satisfaction with respect to the diversity of content recommended to them through digital platforms' algorithms. There is also a need to better assess citizens' awareness and perceptions with respect to the diversity of sources, and the diversity of types and genres of content.

To support general policy development, including the potential development of indicators in relation to this priority, PCH has conducted a national survey to explore Canadians' perceptions of issues related to diversity of content online. The data generated from this survey will contribute to building an evidence base that will inform policy development in that field.

## **6 Political Neutrality Certification**

I hereby certify as Senior Officer of Ipsos that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for

Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

A handwritten signature in black ink, appearing to read "M. Colledge". The signature is written in a cursive style with a large, looping final stroke.

Mike Colledge  
President  
Ipsos Public Affairs

## **7 Contract Value**

The contract value was \$164,631.37 (including HST).