

Summary and Conclusions

**A STUDY OF THE CANADIAN AND CULTURAL CONTENT
ON MAJOR WEBSITES AND PORTALS**

*Prepared for
Department of Canadian Heritage*

February 21, 2001

WALL COMMUNICATIONS INC.

SUMMARY AND CONCLUSIONS

In total, 53 websites most frequently visited by all Canadians and French Canadians were considered in this study in order to assess the quantity and quality of Canadian content and Canadian cultural and heritage content on each of the sites. The websites considered were grouped into four categories: portal, entertainment, news and information and education websites. The websites considered for the study were chosen on the basis of Media Metrix Canada website traffic data for December 2000.

Due to the overlap in the two Internet user groups considered (i.e., all Canadians versus French Canadians), there was also considerable overlap in the most frequently visited websites. Of the total of 27 websites identified as most frequently visited by all Canadians and the 26 most frequently visited by French Canadians, 11 websites were found on both lists. Consequently, 42 rather than 53 unique websites were examined in the course of this study.

Of the websites most frequently visited by all Canadians, 44% were Canadian-based or Canadian-ized versions of US-based websites (e.g., MSN.CA and YAHOO.CA). The lowest percentage of Canadian-based sites, 20% (1 out of five) was found in the entertainment category. In the case of websites most frequently visited by French Canadians, 58% were Canadian-based or Canadian versions of foreign websites. As with the sites most visited by all Canadians, the lowest percentage, 33%, was found in the entertainment category.

Whether the website is Canadian-based or foreign-based has significant implications with respect to the availability of Canadian content as well as Canadian cultural and heritage content. As a general rule, foreign websites contain little if any Canadian

content. There are some exceptions to this rule, of course, such as the Francophone website, FRANCITE.COM, and MP3.COM, which caters to an international audience interested in music (although MP3.COM contains only a minimal amount of Canadian content at best).

Table 11 provides a breakdown of the websites considered for this study according to whether they are Canadian-based or foreign-based.

Table 11
Canadian-based Websites Relative to All Websites Considered

Websites Considered	Websites Most Visited by All Canadians	Websites Most Visited by French Canadians
1. Portal	42%	45%
2. Entertainment	20%	33%
3. News & Information	60%	80%
4. Education	60%	100%
5. All Categories Combined	44%	58%

Wall Communications Inc.

Note: The Entertainment website category was expressly limited to exclude websites that were contest, games or lotto-related.

Of the 26 websites, in total, that are most frequently visited by French Canadians, only 13 or 50% are purely French language sites. Nine of the websites are only available in English, whereas several are available in French and English (e.g., SYMPATICO.CA, MSN.CA and MP3.COM). Also, given the fact that the English-language sites are often ranked higher within the categories examined, it appears that French Canadians either have a strong tendency to prefer English websites or that their choice of French-language websites is currently limited.

Table 12 below provides a summary of the Canadian content and Canadian cultural content found on all websites examined, according to whether they are most frequently visited by all Canadians or French Canadians. The summary covers each of the four website categories considered as well as all four categories combined.

In the case of the portal websites examined, there is generally a considerable amount of Canadian content on the sites most frequently visited by all Canadians as well as by French Canadians. In both cases, as indicated in Table 12, over 40% of the most frequently visited sites have either a significant amount of Canadian content or are fully Canadian. However, as already noted above, Canadian content on portal sites is mostly found only on Canadian-based sites. Moreover, given the focus on news and reference information on all portal sites, there is no more than a minimal amount of Canadian cultural and heritage content to be found on these sites. These conclusions apply whether considering sites visited by all Canadians or French Canadians.

The majority of the entertainment websites examined that were most frequently visited by all Canadians were US-based sites, which contained little if any Canadian content. Indeed, only one out of the top five (or 20%) entertainment websites visited by all Canadians was, in fact, Canadian (i.e., MUCHMUSIC.COM, which contained a significant amount of Canadian content). The percentage was higher in the case of French Canadians (i.e., 50% or 3 out of the six sites examined).¹ In the entertainment category, it appears that Canadian content and, especially, Canadian cultural and heritage content face strong competition from the many available and highly popular US-based entertainment-related websites.

The majority of the news and information websites examined are fully Canadian in terms of content (i.e., 3 out of 5, or 60%, as indicated in Table 12) whether the sites are visited by all Canadians or French Canadians. Moreover, these sites contain a significant amount of Canadian cultural and heritage content. The CBC.CA and RADIO-CANADA.CA websites are standouts in this respect. This finding is not

¹ Although, this result was influenced by the inclusion of both FRANCITE.COM and CA.FRANCITE.COM on the list of entertainment websites visited by French Canadians. Both of these sites could more readily be considered as portal rather than entertainment websites.

surprising, given that all Canadians would naturally tend to gravitate to Canadian websites for general news and information purposes.

Lastly, the education websites examined consist entirely of university websites. As noted, while the education sites examined were reportedly those most frequently visited by Canadians and French Canadians of 17 years old or less, these websites are generally targeted at an older audience. The majority of the websites in this category most frequently visited by all Canadians are Canadian (i.e., 60%) and, in the case of French Canadians, they are 100% Canadian (with the emphasis on Quebec-based university websites). All of the Canadian university websites contain a significant amount of Canadian cultural and heritage content.

Considering all the websites examined combined that were most frequently visited by all Canadians, close to half (or 45%) contained either a significant amount of Canadian content or were fully Canadian. In the case of websites visited by French Canadians, the ratio is even higher at just over 60%. On the other hand, whether the websites are visited by all Canadians or French Canadians, less than a third (i.e., 33%) of the websites contained a significant amount of Canadian cultural and heritage content.

In addition, most of the websites examined contained little more than a minimal amount of advanced multimedia Canadian content. This type of content was generally only found on entertainment websites and news & information websites. Again, the Canadian standouts, in this respect, are CBC.CA and RADIO-CANAD.CA. However, these two websites fall into the news and information rather than entertainment category.

Given the overall popularity and appeal of all of the websites examined, the quality of content, including Canadian content, on all of the sites is generally very high. Most of the sites target very broad audiences, with the main exception being the

education websites that are geared to the academic community. While many of the sites would appeal to varying degrees to young Canadians, only few had specific features aimed at this audience (with the exception of some portal and news & Information sites that had sections for children).

Table 12
CANADIAN CONTENT RELATIVE TO TOTAL WEBSITE CONTENT
By Website Category and For All Websites Examined

Website & Content Categories	Relative Quantity Classifications			
	Negligible	Minimal	Significant	Fully
1. PORTAL WEBSITES				
<i>Most Visited by All Canadians</i>				
Canadian Content	58%	0%	25%	17%
Canadian Cultural/Heritage Content	58%	42%	0%	0%
<i>Most Visited by French Canadians</i>				
Canadian Content	55%	0%	9%	36%
Canadian Cultural/Heritage Content	55%	45%	0%	0%
2. ENTERTAINMENT WEBSITES				
<i>Most Visited by All Canadians</i>				
Canadian Content	60%	20%	20%	0%
Canadian Cultural/Heritage Content	60%	20%	20%	0%
<i>Most Visited by French Canadians</i>				
Canadian Content	33%	17%	50%	0%
Canadian Cultural/Heritage Content	33%	50%	17%	0%
3. NEWS & INFORMATION WEBSITES				
<i>Most Visited by All Canadians</i>				
Canadian Content	40%	0%	0%	60%
Canadian Cultural/Heritage Content	40%	0%	60%	0%
<i>Most Visited by French Canadians</i>				
Canadian Content	20%	0%	20%	60%
Canadian Cultural/Heritage Content	40%	0%	60%	0%
4. EDUCATION WEBSITES				
<i>Most Visited by All Canadians</i>				
Canadian Content	40%	0%	0%	60%
Canadian Cultural/Heritage Content	40%	0%	60%	0%
<i>Most Visited by French Canadians</i>				
Canadian Content	0%	0%	0%	100%
Canadian Cultural/Heritage Content	0%	0%	100%	0%
4. ALL CATEGORIES COMBINED				
<i>Most Visited by All Canadians</i>				
Canadian Content	52%	4%	15%	30%
Canadian Cultural/Heritage Content	52%	22%	26%	0%
<i>Most Visited by French Canadians</i>				
Canadian Content	35%	4%	19%	42%
Canadian Cultural/Heritage Content	39%	31%	31%	0%

Wall Communications Inc.

Note: Percentages calculated for this table cover all websites examined in each of the four website categories, according to whether they were most frequently visited by all Canadians or by French Canadians. The "All Categories Combined" percentages were calculated on a weighted basis, depending on the number of websites examined in each of the four website categories.