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TELEVISION BROADCASTING, 2002

The statistics presented in this Bulletin are for the fiscal year ending August 31 and cover the period from 1999 to 2002.

The Canadian television broadcasting industry expands

Many Canadians remember the days when television was free and the choice of television viewing was limited to a few local stations. In those days, subscribing to cable added a few channels and provided a better quality image.

A generation of Canadians has grown up in a time where subscribing to television services is common, and viewing choices are much broader. In the last 10 years, an ever-growing number of Canadian specialty channels have been made available to television viewers.

In 2002, Canadian television entered a new era of digital networks. These specialty programming channels became available to those subscribing to the services of a Direct-to-home satellite, digital cable or digital MDS operator. Forty-seven digital specialty channels were launched, adding to the existing 48 analog specialty channels and 14 pay channels. The number of Canadian pay and specialty services has now surpassed the number of private conventional television stations.

The proliferation of programming services and the fragmentation of audiences happened at a time when growth in the advertising market was sluggish. Canadian broadcasters were left fighting for available advertising dollars and struggling to maintain profit margins.

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Slowdown in the growth of airtime sales continues

The airtime sales of television broadcasters grew a modest 2.0% in 2002, less than half the growth achieved in 2001. Conventional private broadcasters were the hardest hit by this slowdown. Their airtime sales dropped 1.8%, the first year-over-year decline since 1993. Public and non-commercial broadcasters' airtime sales were up 3.7% following a year of stronger growth at 6.7%. Revenue growth remained robust in the specialty segment of the industry where airtime sales jumped 16.1% in 2002.

Over the 1999 to 2002 period, the relative importance of airtime sales has steadily declined while the relative importance of grants has been fairly stable. Airtime sales represented 54.7% of revenues in 2002 compared to 59.9% in 1999. Grants represented 14.9 % of the industry's revenues in 2002 compared to 15.6% in 1999.

A changing industry model

The days of so-called free television when broadcasters depended almost exclusively on airtime sales and grants as sources of revenues are long gone. The rapid growth of pay and specialty television has increased the dependence of the Canadian television broadcasting system on subscription revenues. Subscription revenue has now surpassed the \$1.0 billion mark and represented 24.4% of all revenues of television broadcasters in 2002, significantly more the 17.8% share it accounted for in 1999.

Profit margins are declining

The strong competition for advertising dollars and audiences has exercised a downward pressure on profit margins (before interest and taxes) in the industry. Both the conventional and specialty television segments saw their profit margin decline in 2002.

The profit margin of private conventional broadcasters fell below 10.0 % in 2002 for the first time since 1991. This was the third consecutive year-over-year decline in the profit margin of this segment of the industry.

The specialty segment also experienced a substantial decrease of its profit margin, largely a result of the \$54.9 million losses incurred by the new digital networks. As a whole, this segment's profit before interest and taxes represented 8.4 % of its revenues compared to 17.3 % the previous year. When the results of digital networks are excluded, the profit margin of the segment rose to 19.4 %.

The pay television segment was the most profitable of the industry. Its profit before interest and taxes represented 24.2% of its revenues in 2002, up from 21.7% a year earlier.

Programming and production expenses were up in 2002

Television broadcasters spent a greater proportion of their revenues on programming and production in 2002 than in the previous three years. That proportion reached 61.3% in 2002 compared to 59.0% in 2001. The growth in these expenses outpaced the growth in revenues in all segments of the industry in 2002.

Note of appreciation

Canada owes the success of its statistical system to a long-standing partnership between Statistics Canada, the citizens of Canada, its businesses, governments and other institutions. Accurate and timely statistical information could not be produced without their continued cooperation and goodwill.

Standards of service to the public

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Industry coverage

The statistics presented in this Bulletin are for the following categories of the 1997 North American Industrial Classification System (NAICS): Television Broadcasting (51312) and Pay and Specialty Television (51321).

Surveys

The annual surveys on which this publication is based target all organisations licensed by the Canadian Radio-television and Telecommunications Commission (CRTC) to operate conventional radio or television programming undertakings and specialty and pay television service operators. The survey targeting conventional broadcasters is conducted jointly by Statistics Canada and the CRTC. The Broadcast Analysis Branch of the CRTC manages the survey targeting the specialty and pay television operators. Statistics from both surveys are presented here to provide a more complete picture of the structural changes affecting this sector.

Data quality

The data presented in this Bulletin are of very good quality and can therefore be used with confidence. This assessment is based on available data accuracy measures and the judgement of the analysts involved in this survey. These statistics are, however, subject to revision. Revisions are usually the result of late receipt of information, of re-filing by respondents of previously submitted data, or of detection of errors after publication of data. They typically do not have a material impact on the preliminary results. Past revisions accounted for less than 1% of the value for key variables such as total revenues, salaries and wages and number of employees. Users interested in learning more about the concepts, methodology and data quality of the broadcasting surveys can visit Statistics Canada's web site at www.statcan.ca/statisticalmethods. This statement is also available on request (see contact information below).

For more information

In addition to the information provided in this publication, special tables and analytical services are available on a cost recovery basis from the Telecommunications Section; Science, Innovation and Electronic Information Division. Access to selected information on the broadcasting industries is also available through CANSIM, Statistics Canada's data base and retrieval system (table 3570001). For further information, contact Advisory Services Division at 1 800 263 1136, fax 1 877 287-4369, infostats@statcan.ca.

TABLE 1. Selected Financial and Employment Indicators - Television Broadcasters (NAICS 51312 and 51322)¹

	2002	2001	2000	1999
Total revenues by type of broadcaster	(\$000)			
Private conventional television	1,898,188.3	1,910,852.5	1,887,221.3	1,873,901.6
Public and non-commercial conventional television	1,175,232.1	1,126,210.0	1,132,753.4	1,070,136.4
Specialty television ²	1,368,291.3	1,204,515.3	1,056,762.3	880,655.9
Pay television ²	332,513.1	285,993.8	213,669.2	156,681.9
Total	4,774,224.8	4,527,571.5	4,290,406.2	3,981,375.8
Total revenues by source				
Air time	2,612,415.2	2,561,573.4	2,456,089.6	2,386,629.2
Subscription	1,163,494.5	1,021,720.1	858,944.3	707,605.9
Grants	709,675.6	670,496.6	620,304.0	622,060.4
Other	288,639.5	273,781.4	355,068.2	265,080.4
Total	4,774,224.8	4,527,571.5	4,290,406.2	3,981,375.8
Sale of airtime by type of broadcaster				
Private conventional television	1,758,765.9	1,790,681.3	1,763,473.6	1,758,751.3
Public and non-commercial conventional television	345,166.5	332,868.5	311,914.8	323,494.9
Specialty television ²	508,482.9	438,023.7	380,701.1	304,383.0
Pay television ²	0.0	0.0	0.0	0.0
Total - Sale of air time	2,612,415.2	2,561,573.4	2,456,089.6	2,386,629.2
Profit margin (PBIT) by type of broadcaster (private)	%			
Private conventional television	9.6	12.6	13.8	14.9
Specialty television ²	8.4	17.3	18.5	13.3
Pay television ²	24.2	21.7	12.3	20.2
Total	10.5	15.1	15.2	14.7
Salaries and benefits by type of broadcaster	(\$000)			
Private conventional television	519,083.1	495,270.2	478,068.8	480,935.6
Public and non-commercial conventional television	610,307.0	564,229.7	571,565.1	573,921.5
Specialty television ²	265,986.2	211,582.2	194,208.6	168,837.2
Pay television ²	19,109.4	16,419.6	15,186.2	14,162.1
Total	1,414,485.8	1,287,501.7	1,259,028.7	1,237,856.4
Average weekly number of employees by type of broadcaster	#			
Private conventional television	7,813	7,818	7,624	7,664
Public and non-commercial conventional television	9,319	7,854	8,856	8,918
Specialty television ²	4,523	3,561	3,385	3,164
Pay television ²	285	284	241	224
Total	21,940	19,517	20,106	19,970
Programming and production expenses	(\$000)			
Private conventional television	1,137,705	1,112,200	1,060,366	1,022,363
Public and non-commercial conventional television	805,000	735,318	683,982	693,595
Specialty television ²	797,933	672,287	573,399	506,036
Pay television ²	187,473	153,170	115,176	83,684
Total	2,928,111	2,672,975	2,432,923	2,305,678

¹ North American Industry Classification System (51312 - Television Broadcasting and 51322 - Pay and Specialty Television)² Statistics collected and published by the CRTC, Industry Statistics and Analysis, Broadcast Analysis Branch

TABLE 2. Private Conventional Television Broadcasters, Revenue and Expense Statement, Canada, 1999-2002

	2002		2001		2000		1999	
	\$	%	\$	%	\$	%	\$	%
Revenue:								
Sale of air time:								
Local	347,595,689	18.3	370,442,644	19.4	361,523,423	19.2	383,859,073	20.5
National	1,151,476,958	60.7	1,124,844,037	58.9	1,130,897,521	59.9	1,101,359,240	58.8
Network	241,312,784	12.7	275,783,571	14.4	253,706,928	13.4	258,383,517	13.8
Infomercials	18,380,422	1.0	19,611,001	1.0	17,345,775	0.9	15,149,473	0.8
Sale of air time - Total	1,758,765,853	92.7	1,790,681,253	93.7	1,763,473,647	93.4	1,758,751,303	93.9
Production and other:								
Syndication	39,559,488	2.1	39,744,125	2.1	38,773,924	2.1	37,762,317	2.0
Production	17,526,922	0.9	20,524,278	1.1	24,616,541	1.3	35,637,403	1.9
Other	82,336,016	4.3	59,902,803	3.1	60,357,210	3.2	41,750,563	2.2
Production and other - Total	139,422,426	7.3	120,171,206	6.3	123,747,675	6.6	115,150,283	6.1
Revenue - Total	1,898,188,279	100.0	1,910,852,458	100.0	1,887,221,322	100.0	1,873,901,585	100.0
Expenses:								
Program	1,137,705,324	59.9	1,112,200,066	58.2	1,060,366,478	56.2	1,022,362,859	54.6
Technical Services	63,973,158	3.4	60,158,649	3.1	72,465,568	3.8	76,815,526	4.1
Sales and promotion	221,974,027	11.7	206,871,559	10.8	208,872,735	11.1	210,686,306	11.2
Administration and general	216,299,963	11.4	219,244,160	11.5	216,926,047	11.5	216,630,692	11.6
Depreciation	76,057,307	4.0	70,730,669	3.7	68,736,943	3.6	68,035,113	3.6
Interest expense ¹	34,713,902	1.8	40,673,808	2.1	81,239,271	4.3	84,467,866	4.5
Expenses - Total	1,750,723,679	92.2	1,709,878,910	89.5	1,708,607,037	90.5	1,678,998,368	89.6
Net operating income	147,464,600	7.8	200,973,548	10.5	178,614,285	9.5	194,903,217	10.4
Other adjustments-income (expense) ²	-51,444,098	-2.6	-68,869,465	-3.5	1,418,227	0.1	-12,264,411	-0.6
Net income (loss) before income taxes	96,020,506	5.1	132,104,080	6.9	180,032,514	9.5	182,638,807	9.7
Provision for income taxes	269,105	0.0	6,480,347	0.3	74,807,203	4.0	87,251,444	4.7
Net income (loss) after income taxes	95,751,401	5.0	125,623,732	6.6	105,225,311	5.6	95,387,363	5.1
Salaries and other staff benefits	519,083,109	27.3	495,270,225	25.9	478,068,800	25.3	480,935,564	25.7
Number of employees (weekly average)	7,813	...	7,818	...	7,624	...	7,664	...
Reporting units showing profits	54		62		74		67	
Reporting units showing losses	53		45		36		41	

¹ The 2001 interest data is not comparable to previous year data. As a result of re-organizations and changes in accounting practices, some respondents have not declared interest payments at the station level in 2001. They now treat this expense as a corporate expense.

² The increase in "Other Adjustments" in 2001 primarily reflects re-organization costs.

... Not applicable

TABLE 3. Private Conventional Television Broadcasters, Revenue and Expense Statement, Atlantic Provinces, 1999-2002

	2002		2001		2000		1999	
	\$	%	\$	%	\$	%	\$	%
Revenue:								
Sale of air time:								
Local	22,399,713	32.4	22,098,081	32.6	21,399,521	32.8	21,883,714	33.5
National	30,739,245	44.4	28,559,973	42.1	28,985,808	44.5	28,298,371	43.4
Network	13,554,430	19.6	15,309,004	22.6	12,716,949	19.5	12,601,367	19.3
Infomercials	477,553	0.7	355,435	0.5	347,517	0.5	601,873	0.9
Sale of air time - Total	67,170,941	97.1	66,322,493	97.9	63,449,795	97.4	63,385,325	97.2
Production and other:								
Syndication	0	0.0	0	0.0	0	0.0	0	0.0
Production	308,128	0.4	312,148	0.5	359,509	0.6	554,430	0.8
Other	1,688,888	2.4	1,140,401	1.7	1,337,760	2.1	1,291,485	2.0
Production and other - Total	1,997,016	2.9	1,452,549	2.1	1,697,269	2.6	1,845,915	2.8
Revenue - Total	69,167,957	100.0	67,775,042	100.0	65,147,064	100.0	65,231,238	100.0
Expenses:								
Program	47,960,161	69.3	46,158,426	68.1	42,301,243	64.9	41,856,205	64.2
Technical Services	6,092,102	8.8	6,259,374	9.2	6,900,431	10.6	7,093,751	10.9
Sales and promotion	8,957,219	12.9	8,630,648	12.7	8,830,905	13.6	8,178,550	12.5
Administration and general	10,458,277	15.1	9,407,389	13.9	7,901,523	12.1	8,000,624	12.3
Depreciation	3,123,675	4.5	3,235,929	4.8	3,555,805	5.5	4,112,157	6.3
Interest expense	102,291	0.1	160,221	0.2	1,186,735	1.8	1,008,759	1.5
Expenses - Total	76,693,725	110.9	73,851,987	109.0	70,676,638	108.5	70,250,046	107.7
Net operating income	-7,525,768	-10.8	-6,076,945	-8.9	-5,529,574	-8.4	-5,018,808	-7.6
Other adjustments-income (expense)	-3,190,269	-4.5	-2,909,845	-4.2	40,807	0.1	-562,944	-0.8
Net income (loss) before income taxes	-10,716,036	-15.4	-8,986,789	-13.2	-5,488,768	-8.3	-5,581,750	-8.5
Provision for income taxes	-42,660	0.0	-53,956	0.0	-1,950,955	-2.9	-1,338,156	-2.0
Net income (loss) after income taxes	-10,673,376	-15.3	-8,932,833	-13.1	-3,537,813	-5.3	-4,243,594	-6.4
Salaries and other staff benefits	25,284,550	36.6	23,852,726	35.2	22,673,274	34.8	24,223,823	37.1
Number of employees (weekly average)	380	...	431	...	395	...	422	...
Reporting units showing profits	4		4		5		5	
Reporting units showing losses	5		5		4		4	

... Not applicable

TABLE 4. Private Conventional Television Broadcasters, Revenue and Expense Statement, Québec, 1999-2002

	2002		2001		2000		1999	
	\$	%	\$	%	\$	%	\$	%
Revenue:								
Sale of air time:								
Local	95,206,768	21.1	98,946,171	22.1	94,645,742	21.6	88,196,890	20.8
National	177,536,658	39.4	177,838,746	39.8	186,364,098	42.5	186,553,794	44.0
Network	90,898,356	20.2	90,920,865	20.3	82,346,070	18.8	89,239,247	21.0
Infomercials	5,779,201	1.3	6,633,352	1.5	5,803,469	1.3	4,787,203	1.1
Sale of air time - Total	369,420,983	82.0	374,339,134	83.8	369,159,379	84.2	368,777,134	87.0
Production and other:								
Syndication	35,430,619	7.9	34,253,235	7.7	33,792,883	7.7	30,053,651	7.1
Production	6,897,172	1.5	8,579,585	1.9	8,283,735	1.9	8,268,014	2.0
Other	38,593,788	8.6	29,630,070	6.6	27,455,191	6.3	16,879,309	4.0
Production and other - Total	80,921,579	18.0	72,462,890	16.2	69,531,809	15.8	55,200,974	13.0
Revenue - Total	450,342,562	100.0	446,802,022	100.0	438,691,188	100.0	423,978,108	100.0
Expenses:								
Program	255,030,928	56.6	241,121,621	54.0	230,573,423	52.6	217,748,908	51.4
Technical Services	14,997,959	3.3	13,346,592	3.0	14,599,000	3.3	14,480,487	3.4
Sales and promotion	53,457,619	11.9	52,014,606	11.6	51,817,459	11.8	50,075,742	11.8
Administration and general	79,686,058	17.7	81,981,513	18.3	79,794,517	18.2	80,078,620	18.9
Depreciation	19,780,709	4.4	17,995,870	4.0	15,823,889	3.6	15,049,983	3.5
Interest expense	4,599,121	1.0	9,207,135	2.1	8,494,293	1.9	7,090,891	1.7
Expenses - Total	427,552,393	94.9	415,667,337	93.0	401,102,580	91.4	384,524,632	90.7
Net operating income	22,790,169	5.1	31,134,685	7.0	37,588,608	8.6	39,453,476	9.3
Other adjustments-income (expense)	-4,522,652	-0.9	-9,786,391	-2.1	9,488,200	2.2	-410,552	0.0
Net income (loss) before income taxes	18,267,517	4.1	21,348,296	4.8	47,076,809	10.7	39,042,924	9.2
Provision for income taxes	14,167,926	3.1	7,755,256	1.7	19,631,581	4.5	23,735,368	5.6
Net income (loss) after income taxes	4,099,590	0.9	13,593,039	3.0	27,445,228	6.3	15,307,556	3.6
Salaries and other staff benefits	142,298,188	31.6	143,151,532	32.0	144,204,442	32.9	140,960,312	33.2
Number of employees (weekly average)	2,153	...	2,194	...	2,066	...	2,028	...
Reporting units showing profits	19		21		21		19	
Reporting units showing losses	8		7		7		10	

... Not applicable

TABLE 5. Private Conventional Television Broadcasters, Revenue and Expense Statement, Ontario, 1999-2002

	2002		2001		2000		1999	
	\$	%	\$	%	\$	%	\$	%
Revenue:								
Sale of air time:								
Local	84,251,239	10.1	90,364,687	10.8	85,967,980	10.6	112,690,406	13.7
National	625,949,378	75.0	614,879,000	73.7	613,559,017	75.3	590,672,034	72.0
Network	82,697,409	9.9	98,073,213	11.8	80,032,450	9.8	77,521,285	9.5
Infomercials	8,352,329	1.0	6,442,413	0.8	6,208,881	0.8	4,974,354	0.6
Sale of air time - Total	801,250,355	96.0	809,759,313	97.1	785,768,328	96.5	785,858,079	95.8
Production and other:								
Syndication	2,187,698	0.3	4,146,702	0.5	3,978,737	0.5	6,796,410	0.8
Production	5,337,813	0.6	5,312,073	0.6	9,269,407	1.1	13,117,726	1.6
Other	25,891,325	3.1	14,607,089	1.8	15,360,603	1.9	14,507,945	1.8
Production and other - Total	33,416,836	4.0	24,065,864	2.9	28,608,747	3.5	34,422,081	4.2
Revenue - Total	834,667,193	100.0	833,825,180	100.0	814,377,074	100.0	820,280,161	100.0
Expenses:								
Program	476,912,684	57.1	482,185,587	57.8	462,777,495	56.8	440,490,185	53.7
Technical Services	25,305,225	3.0	23,790,499	2.9	26,062,598	3.2	26,955,419	3.3
Sales and promotion	86,806,224	10.4	82,466,921	9.9	81,985,147	10.1	83,532,075	10.2
Administration and general	76,047,701	9.1	75,510,519	9.1	71,618,340	8.8	68,052,569	8.3
Depreciation	32,997,055	4.0	30,735,156	3.7	28,904,998	3.5	27,448,328	3.3
Interest expense	24,513,449	2.9	24,864,123	3.0	57,490,760	7.1	52,782,120	6.4
Expenses - Total	722,582,338	86.6	719,552,804	86.3	728,839,337	89.5	699,260,697	85.2
Net operating income	112,084,855	13.4	114,272,376	13.7	85,537,737	10.5	121,019,464	14.8
Other adjustments-income (expense)	-22,025,668	-2.5	-43,891,666	-5.2	-5,528,039	-0.6	-1,512,598	-0.1
Net income (loss) before income taxes	90,059,187	10.8	70,380,705	8.4	80,009,698	9.8	119,506,865	14.6
Provision for income taxes	-10,031,629	-1.1	-13,218,090	-1.5	32,059,660	3.9	47,586,653	5.8
Net income (loss) after income taxes	100,090,817	12.0	83,598,795	10.0	47,950,038	5.9	71,920,212	8.8
Salaries and other staff benefits	189,079,984	22.7	181,013,250	21.7	168,309,063	20.7	160,521,962	19.6
Number of employees (weekly average)	2,680	...	2,694	...	2,663	...	2,590	...
Reporting units showing profits	15		12		19		17	
Reporting units showing losses	14		17		14		13	

... Not applicable

TABLE 6. Private Conventional Television Broadcasters, Revenue and Expense Statement, Manitoba, Saskatchewan, Alberta, B.C., 1999-2002

	2002		2001		2000		1999	
	\$	%	\$	%	\$	%	\$	%
Revenue:								
Sale of air time:								
Local	145,737,969	26.8	159,033,705	28.3	159,510,180	28.0	161,088,063	28.5
National	317,251,677	58.3	303,566,318	54.0	301,988,598	53.1	295,835,041	52.4
Network	54,162,589	10.0	71,480,489	12.7	78,611,459	13.8	79,021,618	14.0
Infomercials	3,771,339	0.7	6,179,801	1.1	4,985,908	0.9	4,786,043	0.8
Sale of air time - Total	520,923,574	95.8	540,260,313	96.1	545,096,145	95.8	540,730,765	95.8
Production and other:								
Syndication	1,941,171	0.4	1,344,188	0.2	1,002,304	0.2	912,256	0.2
Production	4,983,809	0.9	6,320,472	1.1	6,703,890	1.2	13,697,233	2.4
Other	16,162,015	3.0	14,525,243	2.6	16,203,656	2.8	9,071,824	1.6
Production and other - Total	23,086,995	4.2	22,189,903	3.9	23,909,850	4.2	23,681,313	4.2
Revenue - Total	544,010,567	100.0	562,450,214	100.0	569,005,996	100.0	564,412,078	100.0
Expenses:								
Program	357,801,551	65.8	342,734,432	60.9	324,714,317	57.1	322,267,561	57.1
Technical Services	17,577,872	3.2	16,762,184	3.0	24,903,539	4.4	28,285,869	5.0
Sales and promotion	72,752,965	13.4	63,759,384	11.3	66,239,224	11.6	68,899,939	12.2
Administration and general	50,107,927	9.2	52,344,739	9.3	57,611,667	10.1	60,498,879	10.7
Depreciation	20,155,868	3.7	18,763,714	3.3	20,452,251	3.6	21,424,645	3.8
Interest expense	5,499,041	1.0	6,442,329	1.1	14,067,483	2.5	23,586,096	4.2
Expenses - Total	523,895,223	96.3	500,806,782	89.0	507,988,482	89.3	524,962,993	93.0
Net operating income	20,115,344	3.7	61,643,432	11.0	61,017,514	10.7	39,449,085	7.0
Other adjustments-income (expense)	-21,705,509	-3.9	-12,281,563	-2.1	-2,582,741	-0.4	-9,778,317	-1.6
Net income (loss) before income taxes	-1,590,162	-0.2	49,361,868	8.8	58,434,775	10.3	29,670,768	5.3
Provision for income taxes	-3,824,532	-0.6	11,997,137	2.1	25,066,917	4.4	17,267,579	3.1
Net income (loss) after income taxes	2,234,370	0.4	37,364,731	6.6	33,367,858	5.9	12,403,189	2.2
Salaries and other staff benefits	162,420,387	29.9	147,252,717	26.2	142,882,021	25.1	155,229,467	27.5
Number of employees (weekly average)	2,600	...	2,499	...	2,500	...	2,624	...
Reporting units showing profits	16		25		29		26	
Reporting units showing losses	26		16		11		14	

... Not applicable