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Television Broadcasting Industries



2008



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Symbols

The following standard symbols are used in Statistics Canada publications:

- . not available for any reference period
- .. not available for a specific reference period
- ... not applicable
- 0 true zero or a value rounded to zero
- 0^s value rounded to 0 (zero) where there is a meaningful distinction between true zero and the value that was rounded
- p preliminary
- r revised
- x suppressed to meet the confidentiality requirements of the *Statistics Act*
- E use with caution
- F too unreliable to be published

Abbreviations

n.e.c. not elsewhere classified

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Highlights

- The operating revenues of the television broadcasting sector totalled \$6.5 billion in 2008, up 5.4% from 2007. The increase between 2006 and 2007 was 3.0%. However, the overall results for the sector do not describe the very different situations in its various industries, particularly the difficult year for private conventional television.
- The operating revenues of private conventional television broadcasters fell 1.8% to \$2.1 billion in 2008. It is this industry's largest annual decline in revenues in more than 30 years and the second year-over-year decrease in the last three years.
- During that time, the specialty and pay television segments enjoyed operating revenue gains of 6.5% and 11.8% respectively in 2008 compared with the previous year. Nevertheless, those are the lowest year-over-year increases in three years.
- The specialty television segment led the industry in revenues in 2008 (\$2.3 billion), dislodging private conventional television from the top spot it had held for many years.
- The 5.4% rise in the television broadcasting sector's total operating revenues was partly due to an ad hoc 13.2% increase in public and non-commercial television revenues, following a 5.3% decline between 2006 and 2007. The upturn was attributable to advertising revenues from the Summer Olympics and a substantial increase in grants.
- The television advertising market grew by 2.8% in 2008 compared with 2007. While advertising revenues continued to climb for specialty television in 2008 (+8.1%) and rebounded for public television (+17.8%) after a year of decline, they were down for the first time in six years for private conventional television (-2.0%).
- The profit margin before interest and taxes surpassed 20.0% for the fourth consecutive year for specialty channels and for the seventh straight year for pay channels. On the other hand, private conventional stations generated a profit margin before interest and taxes of less than 1% in 2008, the lowest in the last 30 years. Specialty and pay channels accounted for more than 99% of the private television industry's profits in 2008.

Television broadcasting

The statistics presented in this publication are for the fiscal year ending August 31 and cover the period from 2004 to 2008. The analysis below includes references to earlier periods when it is useful to put the industry's recent performance in historical context.

Steady growth in television broadcasters' revenues

The operating revenues of the television broadcasting sector¹ totalled \$6.5 billion in 2008, up 5.4% from 2007. The increase came after a year of slower growth, revenues having risen 3.0% between 2006 and 2007. The revenue gain between 2007 and 2008 is close to the average growth of 5.6%² since 1999. However, the overall picture for the television broadcasting sector does not describe some substantial differences between the various industries.

A tough year for private conventional television

Revenues for private conventional television totalled \$2.1 billion in 2008, down 1.8% from 2007. It is this industry's largest annual decline in revenues in more than 30 years and the second year-over-year decrease in three years.

Private conventional television has been going through a difficult period financially in recent years because of the loss of television advertising market share to the specialty television segment. It captured 58.8% of that \$3.4 billion market in 2008, compared with 68.1% five years earlier, in 2003. The advertising market is particularly important to private conventional television since it is the source of virtually all its revenues.

The combined effect of the 1.8% decline in operating revenues and the 3.4% increase in operating expenses was a substantial decline in private conventional television broadcasters' profits before interest and taxes. The latter fell from \$116.0 million in 2007 to \$4.8 million in 2008, a 95.8% drop. It is the lowest profit before interest and taxes in the last 30 years, and it is only the second time in 15 years that this segment has generated less than \$100 million in profits before interest and taxes. In 2006, profits before interest and taxes were \$90.9 million.

Private conventional stations had a profit margin before interest and taxes of less than 1% in 2008. Nearly half of all private conventional stations suffered losses before interest and taxes in 2008.

Quebec's private conventional television industry was the only one that posted an increase in profits in 2008 compared with 2007 (+8.1%). For the first time in nearly 15 years, Ontario's private conventional stations suffered losses (\$22.5 million). The situation is also difficult in the Atlantic provinces, as private conventional stations have not turned a profit before interest and taxes since 1999. In Western Canada, profits fell 68.3% in the space of one year.

Continued growth for pay³ and specialty⁴ television

The specialty and pay television segments enjoyed operating revenue gains of 6.5% and 11.8% respectively in 2008 compared with the previous year. Those are, however, the segments' lowest year-over-year increases in three years. For specialty television, the growth was attributable to both subscription revenues (+5.4%) and

1. The sum of North American Industry Classification System (NAICS) industries 51512 – Television Broadcasting and 51521 – Pay and Specialty Television.

2. Compound annual growth rate.

3. The data on specialty and pay television are from the statistical report by the Canadian Radio-television and Telecommunications Commission's Industry Analysis Group.

4. Specialty channels broadcast theme-specific programs (sports, news, documentaries, etc.), and their business models are based on two sources of revenue: advertising revenue and subscription revenues. Pay television channels rely only on subscription fees and/or payments for pay-per-view programs.

advertising revenue (+8.1%). Growing interest in television on demand is responsible for the pay television industry's gain. Revenues from on-demand services reached \$269.6 million in 2008, up 36.3% from 2007.

As yet another indication of the fundamental changes occurring in television broadcasting, specialty television led the sector in revenues in 2008 (\$2.3 billion), dislodging private conventional television from the top spot it had held for many years. In fact, 10 years earlier, in 1998, specialty television accounted for 19.0% of total television revenues, third behind private conventional television (48.2%) and public television (29.5%). In 2008, specialty television generated 35.7% of the Canadian television industry's revenues, compared with 32.9% for private conventional television and 22.0% for public television. Pay television ranked fourth with 9.4% of total revenues (\$612.0 million).

The profits before interest and taxes of pay and specialty television totalled \$686.1 million in 2008 accounting for more than 99% of the private television industry's profits.

The profit margin before interest and taxes surpassed 20.0% for the fourth consecutive year for specialty channels and for the seventh straight year for pay television channels.

Public television rebounds

The 5.4% rise in the television broadcasting sector's total operating revenues was partly due to an ad hoc 13.2% increase in public and non-commercial television revenues, following a 5.3% decline between 2006 and 2007. The upturn was attributable to advertising revenues from the Summer Olympics and a substantial increase in grants.

The revenue gain was accompanied by a 14.5% jump in operating expenses, a larger increase than in any other segment. Programming expenses were largely responsible for the increase, rising 17.1%.

The restructuring of the television advertising market continues

Advertising revenue continued to shift from private conventional television to specialty television. Private conventional television's share of the television advertising market was 58.8% in 2008, down from 68.1% five years before. During that five year period, the share held by specialty television went from 21.4% to 30% while the share of public television remained almost unchanged at nearly 11%.

The television advertising market advanced 2.8% in 2008 to \$3.4 billion, nearly double the previous year's 1.8% growth.

Programming and production expenses also affected by competition

The competition for advertising between the various segments of the television industry is reflected in their battle to attract audiences and, ultimately, in their programming and production expenses. As a result, broadcasters spent 10.2% more on programming and production in 2008 than in 2007, surpassing revenue growth by a significant margin.

For private conventional television, programming and production expenses rose 3.8% between 2007 and 2008, despite the decline in revenue. In fact, programming and production expenses were 68.8% of the channels' operating revenues, compared with 56.8% five years earlier, in 2003.

For specialty and pay television, programming expenses grew in tandem with revenues. They increased by 13.1% and 8.6% respectively between 2007 and 2008. For both segments combined, programming expenses were 54.5% of revenues in 2008. That ratio has been steady for the last five years.

Related products

Selected publications from Statistics Canada

56-001-X Broadcasting and Telecommunications

Selected CANSIM tables from Statistics Canada

357-0001 Radio and television broadcasting industries, by North American Industry Classification System (NAICS), annual

Selected surveys from Statistics Canada

2724 Radio and Television Broadcasting Survey

Selected summary tables from Statistics Canada

- *Radio and television industries, financial and operating statistics*

Statistical tables

Table 1
Selected financial and employment indicators, television broadcasters (NAICS 51512 and 51521) ¹

	2004	2005	2006	2007	2008	2005/2004	2006/2005	2007/2006	2008/2007
	thousands of dollars				percentage change				
Total revenues by type of broadcaster									
Private conventional television	2,082,902	2,166,063	2,163,622	2,187,197	2,147,417	4.0	-0.1	1.1	-1.8
Public and non-commercial television	1,238,192	1,173,730	1,337,943	1,266,919	1,433,882	-5.2	14.0	-5.3	13.2
Specialty television ²	1,680,826	1,812,312	2,016,708	2,181,736	2,324,304	7.8	11.3	8.2	6.5
Pay television ²	384,375	409,795	482,325	547,553	612,028	6.6	17.7	13.5	11.8
Total	5,386,295	5,561,900	6,000,598	6,183,405	6,517,631	3.3	7.9	3.0	5.4
	percent				percentage change				
Market share by type of broadcaster (revenue)									
Private conventional television	38.7	38.9	36.1	35.4	32.9	0.7	-7.4	-1.9	-6.9
Public and non-commercial television	23.0	21.1	22.3	20.5	22.0	-8.2	5.7	-8.1	7.4
Specialty television ²	31.2	32.6	33.6	35.3	35.7	4.4	3.1	5.0	1.1
Pay television ²	7.1	7.4	8.0	8.9	9.4	3.2	9.1	10.2	6.0
	thousands of dollars				percentage change				
Total revenues by source									
Air time	2,976,591	3,029,770	3,260,505	3,318,691	3,411,309	1.8	7.6	1.8	2.8
Subscription	1,330,758	1,418,787	1,580,399	1,736,347	1,856,106	6.6	11.4	9.9	6.9
Grants	775,988	791,786	831,162	789,690	877,687	2.0	5.0	-5.0	11.1
Other	302,958	321,556	328,532	338,677	372,530	6.1	2.2	3.1	10.0
Total	5,386,295	5,561,900	6,000,598	6,183,405	6,517,631	3.3	7.9	3.0	5.4
	thousands of dollars				percentage change				
Total sales of airtime by type of broadcaster									
Private conventional television	1,942,964	2,017,798	2,027,072	2,047,993	2,006,796	3.9	0.5	1.0	-2.0
Public and non-commercial television	325,211	243,389	351,066	322,329	379,555	-25.2	44.2	-8.2	17.8
Specialty television ²	708,416	768,583	882,368	948,369	1,024,958	8.5	14.8	7.5	8.1
Pay television ²	.	.	.	.	.	.	.	.	.
Total	2,976,591	3,029,770	3,260,505	3,318,691	3,411,309	1.8	7.6	1.8	2.8
	percent				percentage change				
Market share by type of broadcaster (air time)									
Private conventional television	65.3	66.6	62.2	61.7	58.8	2.0	-6.6	-0.7	-4.7
Public and non-commercial television	10.9	8.0	10.8	9.7	11.1	-26.5	34.0	-9.8	14.6
Specialty television ²	23.8	25.4	27.1	28.6	30.0	6.6	6.7	5.6	5.1
Pay television ²	.	.	.	.	.	.	.	.	.
	percent				percentage change				
Profit margin (PBIT) by type of broadcaster (private)									
Private conventional television	11.2	11.2	4.2	5.3	0.2	0.3	-62.5	26.2	-95.7
Specialty television ²	19.6	24.7	22.2	24.3	23.6	26.4	-10.1	9.6	-2.9
Pay television ²	22.2	26.4	25.9	21.3	22.3	18.5	-1.8	-17.8	4.9
Total	15.6	18.2	14.2	15.5	13.6	16.7	-21.8	9.1	-12.5
	thousands of dollars				percentage change				
Salaries and benefits by type of broadcaster									
Private conventional television	559,006	569,915	598,454	598,626	581,421	2.0	5.0	0.0	-2.9
Public and non-commercial television	644,167	640,890	664,147	665,259	691,943	-0.5	3.6	0.2	4.0
Specialty television ²	299,362	314,049	353,926	381,415	371,746	4.9	12.7	7.8	-2.5
Pay television ²	19,514	20,206	21,466	27,010	35,002	3.5	6.2	25.8	29.6
Total	1,522,049	1,545,059	1,637,993	1,672,309	1,680,112	1.5	6.0	2.1	0.5
	number				percentage change				
Average weekly number of employees by type of broadcaster									
Private conventional television	8,072	8,202	8,307	7,972	7,436	1.6	1.3	-4.0	-6.7
Public and non-commercial television	9,502	9,140	9,328	9,164	9,163	-3.8	2.1	-1.8	0.0
Specialty television ²	4,555	4,624	4,972	5,120	5,026	1.5	7.5	3.0	-1.8
Pay television ²	299	294	327	382	469	-1.7	11.2	16.8	22.8
Total	22,428	22,259	22,934	22,637	22,093	-0.8	3.0	-1.3	-2.4
	thousands of dollars				percentage change				
Programming and production expenses									
Private conventional television	1,238,769	1,282,810	1,411,796	1,422,274	1,476,458	3.6	10.1	0.7	3.8
Public and non-commercial television	953,850	853,110	975,649	912,067	1,068,451	-10.6	14.4	-6.5	17.1
Specialty television ²	908,801	885,693	1,061,449	1,105,889	1,250,453	-2.5	19.8	4.2	13.1
Pay television ²	224,088	227,419	269,063	322,841	350,486	1.5	18.3	20.0	8.6
Total	3,325,508	3,249,032	3,717,957	3,763,071	4,145,848	-2.3	14.4	1.2	10.2

1. North American Industry Classification System 2007 (51512 - Television Broadcasting and 51521 - Pay and Specialty Television).

2. Statistics collected and published by the Canadian Radio-television and Telecommunications Commission (CRTC), Industry analysis group.

Note(s): Totals may not add due to rounding.

Table 2
Total television industry, revenue and expense statement, Canada

	2004	2005	2006	2007	2008
	thousands of dollars				
Revenue					
Cable television subscriber revenue	897,118	957,766	1,053,889	1,159,418	1,259,567
Satellite television subscriber revenue	433,640	461,021	526,510	576,929	596,539
Sales of air time					
Local	402,415	396,474	412,634	426,772	429,215
National and network	2,555,691	2,612,438	2,823,870	2,866,498	2,959,376
Infomercials	18,485	20,858	24,002	25,420	22,718
Sales of air time, total	2,976,591	3,029,770	3,260,505	3,318,691	3,411,309
Government and corporate grants	775,988	791,786	831,162	789,690	877,687
Total production and other	302,958	321,556	328,532	338,677	372,530
Operating revenue, total	5,386,295	5,561,900	6,000,598	6,183,405	6,517,631
Expenses					
Program cost	3,325,508	3,249,032	3,717,957	3,763,071	4,145,848
Technical services	254,701	255,465	266,052	273,142	281,878
Sales and promotion	477,289	487,881	539,993	548,357	515,137
Administration and general	645,163	679,279	700,809	727,977	790,383
Depreciation	228,276	227,546	243,531	213,183	230,974
Operating expenses, total	4,930,936	4,899,203	5,468,343	5,525,730	5,964,220
Profit before interest and taxes	455,359	662,696	532,255	657,675	553,411
Interest expense	135,908	137,134	128,510	115,417	160,268
Expenses, total	5,066,844	5,036,337	5,596,853	5,641,147	6,124,489
Net operating income	319,451	525,562	403,745	542,258	393,143
Other adjustments-income (expense)	154,786	85,386	133,791	137,157	135,959
Net profit (loss) before income taxes	474,237	610,948	537,536	679,415	529,102
Salaries and other staff benefits	1,522,049	1,545,059	1,637,993	1,672,309	1,680,112
	number				
Number of employees (weekly average)	22,428	22,259	22,934	22,637	22,093
	percentage of revenue				
Revenue					
Cable television subscriber revenue	16.7	17.2	17.6	18.8	19.3
Satellite television subscriber revenue	8.1	8.3	8.8	9.3	9.2
Sales of air time					
Local	7.5	7.1	6.9	6.9	6.6
National and network	47.4	47.0	47.1	46.4	45.4
Infomercials	0.3	0.4	0.4	0.4	0.3
Sales of air time, total	55.3	54.5	54.3	53.7	52.3
Government and corporate grants	14.4	14.2	13.9	12.8	13.5
Total production and other	5.6	5.8	5.5	5.5	5.7
Operating revenue, total	100.0	100.0	100.0	100.0	100.0
Expenses					
Program cost	61.7	58.4	62.0	60.9	63.6
Technical services	4.7	4.6	4.4	4.4	4.3
Sales and promotion	8.9	8.8	9.0	8.9	7.9
Administration and general	12.0	12.2	11.7	11.8	12.1
Depreciation	4.2	4.1	4.1	3.4	3.5
Operating expenses, total	91.5	88.1	91.1	89.4	91.5
Profit before interest and taxes	8.5	11.9	8.9	10.6	8.5
Interest expense	2.5	2.5	2.1	1.9	2.5
Expenses, total	94.1	90.6	93.3	91.2	94.0
Net operating income	5.9	9.4	6.7	8.8	6.0
Other adjustments-income (expense)	2.9	1.5	2.2	2.2	2.1
Net profit (loss) before income taxes	8.8	11.0	9.0	11.0	8.1
Salaries and other staff benefits	28.3	27.8	27.3	27.0	25.8

Note(s): Totals may not add due to rounding.

Table 3-1
Private conventional television, revenue and expense statement — Canada

	2004	2005	2006	2007	2008
	thousands of dollars				
Revenue					
Sales of air time					
Local	367,140	363,250	376,998	389,988	391,125
National and network	1,557,339	1,633,689	1,626,072	1,632,585	1,592,953
Infomercials	18,485	20,858	24,002	25,420	22,718
Sales of air time, total	1,942,964	2,017,798	2,027,072	2,047,993	2,006,796
Total production and other	139,938	148,265	136,550	139,204	140,621
Operating revenue, total	2,082,902	2,166,063	2,163,622	2,187,197	2,147,417
Expenses					
Program cost	1,238,769	1,282,810	1,411,796	1,422,274	1,476,458
Technical services	65,255	68,101	72,082	72,035	77,966
Sales and promotion	219,672	227,636	248,731	230,716	226,615
Administration and general	244,454	266,013	259,599	269,741	292,098
Depreciation	82,215	78,848	80,470	76,393	69,434
Operating expenses, total	1,850,365	1,923,407	2,072,679	2,071,160	2,142,572
Profit before interest and taxes	232,537	242,656	90,943	116,037	4,845
Interest expense	51,384	49,039	53,918	56,859	49,308
Expenses, total	1,901,749	1,972,446	2,126,596	2,128,018	2,191,880
Net operating income	181,154	193,617	37,025	59,179	-44,463
Other adjustments-income (expense)	-68,954	-107,901	-56,838	-60,489	-56,028
Net profit (loss) before income taxes	112,199	85,715	-19,813	-1,311	-100,491
Provision for income taxes	17,092	24,513	-12,423	6,845	-14,352
Net profit (loss) after income taxes	95,107	61,202	-7,390	-8,156	-86,139
Salaries and other staff benefits	559,006	569,915	598,454	598,626	581,421
	number				
Number of employees (weekly average)	8,072	8,202	8,307	7,972	7,436
	percentage of revenue				
Revenue					
Sales of air time					
Local	17.6	16.8	17.4	17.8	18.2
National and network	74.8	75.4	75.2	74.6	74.2
Infomercials	0.9	1.0	1.1	1.2	1.1
Sales of air time, total	93.3	93.2	93.7	93.6	93.5
Total production and other	6.7	6.8	6.3	6.4	6.5
Operating revenue, total	100.0	100.0	100.0	100.0	100.0
Expenses					
Program cost	59.5	59.2	65.3	65.0	68.8
Technical services	3.1	3.1	3.3	3.3	3.6
Sales and promotion	10.5	10.5	11.5	10.5	10.6
Administration and general	11.7	12.3	12.0	12.3	13.6
Depreciation	3.9	3.6	3.7	3.5	3.2
Operating expenses, total	88.8	88.8	95.8	94.7	99.8
Profit before interest and taxes	11.2	11.2	4.2	5.3	0.2
Interest expense	2.5	2.3	2.5	2.6	2.3
Expenses, total	91.3	91.1	98.3	97.3	102.1
Net operating income	8.7	8.9	1.7	2.7	-2.1
Other adjustments-income (expense)	-3.3	-5.0	-2.6	-2.8	-2.6
Net profit (loss) before income taxes	5.4	4.0	-0.9	-0.1	-4.7
Provision for income taxes	0.8	1.1	-0.6	0.3	-0.7
Net profit (loss) after income taxes	4.6	2.8	-0.3	-0.4	-4.0
Salaries and other staff benefits	26.8	26.3	27.7	27.4	27.1

Note(s): Totals may not add due to rounding.

Table 3-2
Private conventional television, revenue and expense statement — Atlantic provinces

	2004	2005	2006	2007	2008
	thousands of dollars				
Revenue					
Sales of air time					
Local	23,442	24,080	25,862	26,559	26,928
National and network	47,300	50,711	48,400	47,726	45,349
Infomercials	309	489	779	655	484
Sales of air time, total	71,050	75,280	75,041	74,940	72,761
Total production and other	1,815	1,950	2,192	2,695	2,733
Operating revenue, total	72,866	77,230	77,233	77,635	75,494
Expenses					
Program cost	52,631	54,249	59,179	62,093	60,548
Technical services	5,151	4,952	4,888	4,850	4,768
Sales and promotion	8,403	9,424	9,588	8,449	8,506
Administration and general	11,166	12,413	12,688	12,216	14,062
Depreciation	2,398	2,709	2,547	2,046	1,887
Operating expenses, total	79,749	83,747	88,890	89,652	89,770
Profit before interest and taxes	-6,883	-6,517	-11,657	-12,017	-14,276
Interest expense	87	101	2,322	2,640	2,348
Expenses, total	79,835	83,848	91,212	92,292	92,119
Net operating income	-6,970	-6,617	-13,979	-14,657	-16,624
Other adjustments-income (expense)	-3,801	-3,633	-3,347	-2,870	-3,303
Net profit (loss) before income taxes	-10,771	-10,250	-17,326	-17,527	-19,927
Provision for income taxes	170	-14	126	101	170
Net profit (loss) after income taxes	-10,942	-10,236	-17,453	-17,628	-20,097
Salaries and other staff benefits	24,339	24,769	25,501	26,217	26,735
	number				
Number of employees (weekly average)	369	364	357	353	326
	percentage of revenue				
Revenue					
Sales of air time					
Local	32.2	31.2	33.5	34.2	35.7
National and network	64.9	65.7	62.7	61.5	60.1
Infomercials	0.4	0.6	1.0	0.8	0.6
Sales of air time, total	97.5	97.5	97.2	96.5	96.4
Total production and other	2.5	2.5	2.8	3.5	3.6
Operating revenue, total	100.0	100.0	100.0	100.0	100.0
Expenses					
Program cost	72.2	70.2	76.6	80.0	80.2
Technical services	7.1	6.4	6.3	6.2	6.3
Sales and promotion	11.5	12.2	12.4	10.9	11.3
Administration and general	15.3	16.1	16.4	15.7	18.6
Depreciation	3.3	3.5	3.3	2.6	2.5
Operating expenses, total	109.4	108.4	115.1	115.5	118.9
Profit before interest and taxes	-9.4	-8.4	-15.1	-15.5	-18.9
Interest expense	0.1	0.1	3.0	3.4	3.1
Expenses, total	109.6	108.6	118.1	118.9	122.0
Net operating income	-9.6	-8.6	-18.1	-18.9	-22.0
Other adjustments-income (expense)	-5.2	-4.7	-4.3	-3.7	-4.4
Net profit (loss) before income taxes	-14.8	-13.3	-22.4	-22.6	-26.4
Provision for income taxes	0.2	0.0	0.2	0.1	0.2
Net profit (loss) after income taxes	-15.0	-13.3	-22.6	-22.7	-26.6
Salaries and other staff benefits	33.4	32.1	33.0	33.8	35.4

Note(s): Totals may not add due to rounding.

Table 3-3
Private conventional television, revenue and expense statement — Quebec

	2004	2005	2006	2007	2008
	thousands of dollars				
Revenue					
Sales of air time					
Local	102,972	99,080	102,593	101,181	97,082
National and network	296,320	307,400	303,225	293,493	290,858
Infomercials	6,410	6,636	7,221	8,114	7,805
Sales of air time, total	405,702	413,115	413,038	402,788	395,745
Total production and other	60,090	66,873	70,926	62,929	65,164
Operating revenue, total	465,792	479,988	483,964	465,717	460,909
Expenses					
Program cost	233,420	245,905	276,479	274,920	271,976
Technical services	14,394	15,167	17,856	17,657	17,525
Sales and promotion	55,982	61,079	63,781	60,797	57,844
Administration and general	87,793	86,182	77,622	70,274	69,419
Depreciation	20,180	19,438	19,146	18,623	18,795
Operating expenses, total	411,769	427,771	454,883	442,270	435,560
Profit before interest and taxes	54,023	52,217	29,081	23,446	25,349
Interest expense	7,644	7,015	9,404	11,612	12,236
Expenses, total	419,413	434,786	464,287	453,883	447,796
Net operating income	46,379	45,201	19,677	11,834	13,113
Other adjustments-income (expense)	-8,560	-32,913	-5,826	-4,719	-2,039
Net profit (loss) before income taxes	37,819	12,288	13,851	7,115	11,074
Provision for income taxes	13,527	9,417	9,138	18,107	10,898
Net profit (loss) after income taxes	24,291	2,872	4,713	-10,993	176
Salaries and other staff benefits	148,474	153,718	160,261	166,739	165,452
	number				
Number of employees (weekly average)	2,131	2,271	2,345	2,368	2,255
	percentage of revenue				
Revenue					
Sales of air time					
Local	22.1	20.6	21.2	21.7	21.1
National and network	63.6	64.0	62.7	63.0	63.1
Infomercials	1.4	1.4	1.5	1.7	1.7
Sales of air time, total	87.1	86.1	85.3	86.5	85.9
Total production and other	12.9	13.9	14.7	13.5	14.1
Operating revenue, total	100.0	100.0	100.0	100.0	100.0
Expenses					
Program cost	50.1	51.2	57.1	59.0	59.0
Technical services	3.1	3.2	3.7	3.8	3.8
Sales and promotion	12.0	12.7	13.2	13.1	12.5
Administration and general	18.8	18.0	16.0	15.1	15.1
Depreciation	4.3	4.0	4.0	4.0	4.1
Operating expenses, total	88.4	89.1	94.0	95.0	94.5
Profit before interest and taxes	11.6	10.9	6.0	5.0	5.5
Interest expense	1.6	1.5	1.9	2.5	2.7
Expenses, total	90.0	90.6	95.9	97.5	97.2
Net operating income	10.0	9.4	4.1	2.5	2.8
Other adjustments-income (expense)	-1.8	-6.9	-1.2	-1.0	-0.4
Net profit (loss) before income taxes	8.1	2.6	2.9	1.5	2.4
Provision for income taxes	2.9	2.0	1.9	3.9	2.4
Net profit (loss) after income taxes	5.2	0.6	1.0	-2.4	0.0
Salaries and other staff benefits	31.9	32.0	33.1	35.8	35.9

Note(s): Totals may not add due to rounding.

Table 3-4
Private conventional television, revenue and expense statement — Ontario

	2004	2005	2006	2007	2008
thousands of dollars					
Revenue					
Sales of air time					
Local	98,804	97,935	97,500	103,333	100,871
National and network	756,738	775,049	780,349	796,837	759,119
Infomercials	7,666	8,446	8,815	9,227	9,247
Sales of air time, total	863,208	881,430	886,665	909,396	869,238
Total production and other	49,941	50,945	32,944	39,392	38,627
Operating revenue, total	913,148	932,374	919,609	948,788	907,864
Expenses					
Program cost	567,083	573,330	622,871	639,477	668,373
Technical services	27,737	29,511	29,768	29,792	33,308
Sales and promotion	81,151	83,575	91,106	81,689	81,314
Administration and general	80,667	91,125	94,140	110,877	117,626
Depreciation	36,540	35,608	38,063	33,846	29,782
Operating expenses, total	793,178	813,149	875,949	895,681	930,402
Profit before interest and taxes	119,970	119,225	43,660	53,107	-22,538
Interest expense	33,797	34,933	25,101	23,131	20,775
Expenses, total	826,975	848,082	901,050	918,812	951,177
Net operating income	86,173	84,292	18,559	29,976	-43,313
Other adjustments-income (expense)	-37,909	-69,322	-28,256	-25,295	-34,370
Net profit (loss) before income taxes	48,265	14,970	-9,697	4,681	-77,683
Provision for income taxes	7,553	17,648	-15,377	-10,583	-26,837
Net profit (loss) after income taxes	40,711	-2,679	5,680	15,264	-50,846
Salaries and other staff benefits	208,355	211,525	221,757	223,270	201,192
number					
Number of employees (weekly average)	2,864	2,826	2,899	2,713	2,377
percentage of revenue					
Revenue					
Sales of air time					
Local	10.8	10.5	10.6	10.9	11.1
National and network	82.9	83.1	84.9	84.0	83.6
Infomercials	0.8	0.9	1.0	1.0	1.0
Sales of air time, total	94.5	94.5	96.4	95.8	95.7
Total production and other	5.5	5.5	3.6	4.2	4.3
Operating revenue, total	100.0	100.0	100.0	100.0	100.0
Expenses					
Program cost	62.1	61.5	67.7	67.4	73.6
Technical services	3.0	3.2	3.2	3.1	3.7
Sales and promotion	8.9	9.0	9.9	8.6	9.0
Administration and general	8.8	9.8	10.2	11.7	13.0
Depreciation	4.0	3.8	4.1	3.6	3.3
Operating expenses, total	86.9	87.2	95.3	94.4	102.5
Profit before interest and taxes	13.1	12.8	4.7	5.6	-2.5
Interest expense	3.7	3.7	2.7	2.4	2.3
Expenses, total	90.6	91.0	98.0	96.8	104.8
Net operating income	9.4	9.0	2.0	3.2	-4.8
Other adjustments-income (expense)	-4.2	-7.4	-3.1	-2.7	-3.8
Net profit (loss) before income taxes	5.3	1.6	-1.1	0.5	-8.6
Provision for income taxes	0.8	1.9	-1.7	-1.1	-3.0
Net profit (loss) after income taxes	4.5	-0.3	0.6	1.6	-5.6
Salaries and other staff benefits	22.8	22.7	24.1	23.5	22.2

Note(s): Totals may not add due to rounding.

Table 3-5
Private conventional television, revenue and expense statement — Manitoba, Saskatchewan, Alberta and British Columbia

	2004	2005	2006	2007	2008
	thousands of dollars				
Revenue					
Sales of air time					
Local	141,923	142,156	151,043	158,915	166,245
National and network	456,981	500,529	494,098	494,530	497,627
Infomercials	4,100	5,287	7,187	7,424	5,181
Sales of air time, total	603,004	647,973	652,328	660,869	669,052
Total production and other	28,092	28,498	30,488	34,188	34,097
Operating revenue, total	631,097	676,471	682,816	695,057	703,149
Expenses					
Program cost	385,635	409,326	453,267	445,784	475,562
Technical services	17,973	18,470	19,570	19,736	22,366
Sales and promotion	74,136	73,557	84,256	79,781	78,951
Administration and general	64,828	76,293	75,149	76,374	90,990
Depreciation	23,097	21,093	20,715	21,880	18,970
Operating expenses, total	565,669	598,740	652,957	643,555	686,839
Profit before interest and taxes	65,428	77,731	29,859	51,501	16,310
Interest expense	9,856	6,990	17,090	19,476	13,950
Expenses, total	575,525	605,730	670,047	663,032	700,789
Net operating income	55,572	70,741	12,769	32,025	2,360
Other adjustments-income (expense)	-18,684	-2,034	-19,409	-27,604	-16,316
Net profit (loss) before income taxes	36,887	68,707	-6,640	4,421	-13,955
Provision for income taxes	-4,159	-2,538	-6,310	-779	1,417
Net profit (loss) after income taxes	41,046	71,246	-330	5,200	-15,373
Salaries and other staff benefits	177,838	179,903	190,936	182,400	188,042
	number				
Number of employees (weekly average)	2,709	2,741	2,706	2,538	2,478
	percentage of revenue				
Revenue					
Sales of air time					
Local	22.5	21.0	22.1	22.9	23.6
National and network	72.4	74.0	72.4	71.1	70.8
Infomercials	0.6	0.8	1.1	1.1	0.7
Sales of air time, total	95.5	95.8	95.5	95.1	95.2
Total production and other	4.5	4.2	4.5	4.9	4.8
Operating revenue, total	100.0	100.0	100.0	100.0	100.0
Expenses					
Program cost	61.1	60.5	66.4	64.1	67.6
Technical services	2.8	2.7	2.9	2.8	3.2
Sales and promotion	11.7	10.9	12.3	11.5	11.2
Administration and general	10.3	11.3	11.0	11.0	12.9
Depreciation	3.7	3.1	3.0	3.1	2.7
Operating expenses, total	89.6	88.5	95.6	92.6	97.7
Profit before interest and taxes	10.4	11.5	4.4	7.4	2.3
Interest expense	1.6	1.0	2.5	2.8	2.0
Expenses, total	91.2	89.5	98.1	95.4	99.7
Net operating income	8.8	10.5	1.9	4.6	0.3
Other adjustments-income (expense)	-3.0	-0.3	-2.8	-4.0	-2.3
Net profit (loss) before income taxes	5.8	10.2	-1.0	0.6	-2.0
Provision for income taxes	-0.7	-0.4	-0.9	-0.1	0.2
Net profit (loss) after income taxes	6.5	10.5	0.0	0.7	-2.2
Salaries and other staff benefits	28.2	26.6	28.0	26.2	26.7

Note(s): Totals may not add due to rounding.

Table 4
Public and non-commercial television, revenue and expense statement, Canada

	2004	2005	2006	2007	2008
thousands of dollars					
Revenue					
Sales of air time					
Local	18,357	16,203	16,576	17,085	17,891
National and network	306,853	227,187	334,490	305,244	361,664
Sales of air time, total	325,211	243,389	351,066	322,329	379,555
Government and corporate grants	775,988	791,786	831,162	789,690	877,687
Total production and other	136,993	138,554	155,716	154,900	176,640
Operating revenue, total	1,238,192	1,173,730	1,337,943	1,266,919	1,433,882
Expenses					
Program cost	953,850	853,110	975,649	912,067	1,068,451
Technical services	77,334	81,939	84,661	83,132	76,606
Sales and promotion	86,916	85,078	93,670	100,201	87,438
Administration and general	204,224	184,303	206,576	196,353	230,310
Depreciation	107,142	105,029	108,955	81,128	108,646
Operating expenses, total	1,429,466	1,309,461	1,469,512	1,372,882	1,571,450
Profit before interest and taxes	-191,274	-135,731	-131,569	-105,963	-137,569
Interest expense	533	388	358	282	298
Expenses, total	1,429,999	1,309,848	1,469,870	1,373,163	1,571,749
Net operating income	-191,807	-136,118	-131,927	-106,245	-137,867
Other adjustments-income (expense)	193,903	138,405	128,219	115,316	133,686
Net profit (loss) before income taxes	2,096	2,286	-3,708	9,072	-4,181
Salaries and other staff benefits	644,167	640,890	664,147	665,259	691,943
number					
Number of employees (weekly average)	9,502	9,140	9,328	9,164	9,163
percentage of revenue					
Revenue					
Sales of air time					
Local	1.5	1.4	1.2	1.3	1.2
National and network	24.8	19.4	25.0	24.1	25.2
Sales of air time, total	26.3	20.7	26.2	25.4	26.5
Government and corporate grants	62.7	67.5	62.1	62.3	61.2
Total production and other	11.1	11.8	11.6	12.2	12.3
Operating revenue, total	100.0	100.0	100.0	100.0	100.0
Expenses					
Program cost	77.0	72.7	72.9	72.0	74.5
Technical services	6.2	7.0	6.3	6.6	5.3
Sales and promotion	7.0	7.2	7.0	7.9	6.1
Administration and general	16.5	15.7	15.4	15.5	16.1
Depreciation	8.7	8.9	8.1	6.4	7.6
Operating expenses, total	115.4	111.6	109.8	108.4	109.6
Profit before interest and taxes	-15.4	-11.6	-9.8	-8.4	-9.6
Interest expense	0.0	0.0	0.0	0.0	0.0
Expenses, total	115.5	111.6	109.9	108.4	109.6
Net operating income	-15.5	-11.6	-9.9	-8.4	-9.6
Other adjustments-income (expense)	15.7	11.8	9.6	9.1	9.3
Net profit (loss) before income taxes	0.2	0.2	-0.3	0.7	-0.3
Salaries and other staff benefits	52.0	54.6	49.6	52.5	48.3

Note(s): Totals may not add due to rounding.

Table 5-1
Pay and specialty television, revenue and expense statement — Pay and specialty television

	2004	2005	2006	2007	2008
thousands of dollars					
Revenue					
Cable television subscriber revenue	897,118	957,766	1,053,889	1,159,418	1,259,567
Satellite television subscriber revenue	433,640	461,021	526,510	576,929	596,539
Sales of air time					
Local	16,918	17,021	19,060	19,699	20,199
National and network	691,498	751,562	863,308	928,669	1,004,759
Sales of air time, total	708,416	768,583	882,368	948,369	1,024,958
Total production and other	26,027	34,737	36,266	44,573	55,269
Operating revenue, total	2,065,201	2,222,107	2,499,033	2,729,289	2,936,333
Expenses					
Program cost	1,132,888	1,113,112	1,330,512	1,428,730	1,600,939
Technical services	112,113	105,425	109,309	117,975	127,306
Sales and promotion	170,701	175,167	197,592	217,439	201,084
Administration and general	196,485	228,963	234,634	261,882	267,975
Depreciation	38,918	43,669	54,106	55,662	52,894
Operating expenses, total	1,651,105	1,666,336	1,926,152	2,081,688	2,250,198
Profit before interest and taxes	414,095	555,771	572,881	647,600	686,135
Interest expense	83,991	87,707	74,234	58,276	110,662
Expenses, total	1,735,097	1,754,043	2,000,387	2,139,965	2,360,859
Net operating income	330,104	468,064	498,647	589,324	575,473
Other adjustments-income (expense)	29,838	54,883	62,409	82,330	58,301
Net profit (loss) before income taxes	359,942	522,947	561,056	671,654	633,774
Salaries and other staff benefits	318,876	334,255	375,392	408,424	406,748
number					
Number of employees (weekly average)	4,854	4,918	5,299	5,501	5,495
percentage of revenue					
Revenue					
Cable television subscriber revenue	43.4	43.1	42.2	42.5	42.9
Satellite television subscriber revenue	21.0	20.7	21.1	21.1	20.3
Sales of air time					
Local	0.8	0.8	0.8	0.7	0.7
National and network	33.5	33.8	34.5	34.0	34.2
Sales of air time, total	34.3	34.6	35.3	34.7	34.9
Total production and other	1.3	1.6	1.5	1.6	1.9
Operating revenue, total	100.0	100.0	100.0	100.0	100.0
Expenses					
Program cost	54.9	50.1	53.2	52.3	54.5
Technical services	5.4	4.7	4.4	4.3	4.3
Sales and promotion	8.3	7.9	7.9	8.0	6.8
Administration and general	9.5	10.3	9.4	9.6	9.1
Depreciation	1.9	2.0	2.2	2.0	1.8
Operating expenses, total	79.9	75.0	77.1	76.3	76.6
Profit before interest and taxes	20.1	25.0	22.9	23.7	23.4
Interest expense	4.1	3.9	3.0	2.1	3.8
Expenses, total	84.0	78.9	80.0	78.4	80.4
Net operating income	16.0	21.1	20.0	21.6	19.6
Other adjustments-income (expense)	1.4	2.5	2.5	3.0	2.0
Net profit (loss) before income taxes	17.4	23.5	22.5	24.6	21.6
Salaries and other staff benefits	15.4	15.0	15.0	15.0	13.9

Source(s): Canadian Radio-television and Telecommunications Commission (CRTC), Industry Analysis, Policy development and research sector.

Table 5-2
Pay and specialty television, revenue and expense statement — Specialty television

	2004	2005	2006	2007	2008
	thousands of dollars				
Revenue					
Cable television subscriber revenue	684,050	723,423	772,480	834,580	878,854
Satellite television subscriber revenue	265,235	292,066	334,346	366,949	387,844
Sales of air time					
Local	16,918	17,021	19,060	19,699	20,199
National and network	691,498	751,562	863,308	928,669	1,004,759
Sales of air time, total	708,416	768,583	882,368	948,369	1,024,958
Total production and other	23,125	28,240	27,515	31,839	32,648
Operating revenue, total	1,680,826	1,812,312	2,016,708	2,181,736	2,324,304
Expenses					
Program cost	908,801	885,693	1,061,449	1,105,889	1,250,453
Technical services	99,408	93,526	96,323	101,331	103,779
Sales and promotion	142,121	150,104	169,432	181,738	167,756
Administration and general	172,303	204,182	207,005	226,670	224,710
Depreciation	29,566	31,018	34,425	34,971	28,009
Operating expenses, total	1,352,199	1,364,524	1,568,635	1,650,600	1,774,709
Profit before interest and taxes	328,627	447,788	448,074	531,136	549,595
Interest expense	80,892	83,303	69,027	45,006	98,631
Expenses, total	1,433,091	1,447,826	1,637,662	1,695,606	1,873,340
Net operating income	247,735	364,486	379,046	486,130	450,964
Other adjustments-income (expense)	21,908	44,092	44,799	60,896	31,972
Net profit (loss) before income taxes	269,643	408,577	423,845	547,026	482,936
Salaries and other staff benefits	299,362	314,049	353,926	381,415	371,746
	number				
Number of employees (weekly average)	4,555	4,624	4,972	5,120	5,026
	percentage of revenue				
Revenue					
Cable television subscriber revenue	40.7	39.9	38.3	38.3	37.8
Satellite television subscriber revenue	15.8	16.1	16.6	16.8	16.7
Sales of air time					
Local	1.0	0.9	0.9	0.9	0.9
National and network	41.1	41.5	42.8	42.6	43.2
Sales of air time, total	42.1	42.4	43.8	43.5	44.1
Total production and other	1.4	1.6	1.4	1.5	1.4
Operating revenue, total	100.0	100.0	100.0	100.0	100.0
Expenses					
Program cost	54.1	48.9	52.6	50.7	53.8
Technical services	5.9	5.2	4.8	4.6	4.5
Sales and promotion	8.5	8.3	8.4	8.3	7.2
Administration and general	10.3	11.3	10.3	10.4	9.7
Depreciation	1.8	1.7	1.7	1.6	1.2
Operating expenses, total	80.4	75.3	77.8	75.7	76.4
Profit before interest and taxes	19.6	24.7	22.2	24.3	23.6
Interest expense	4.8	4.6	3.4	2.1	4.2
Expenses, total	85.3	79.9	81.2	77.7	80.6
Net operating income	14.7	20.1	18.8	22.3	19.4
Other adjustments-income (expense)	1.3	2.4	2.2	2.8	1.4
Net profit (loss) before income taxes	16.0	22.5	21.0	25.1	20.8
Salaries and other staff benefits	17.8	17.3	17.5	17.5	16.0

Source(s): Canadian Radio-television and Telecommunications Commission (CRTC), Industry Analysis, Policy development and research sector.

Table 5-3
Pay and specialty television, revenue and expense statement — Pay television

	2004	2005	2006	2007	2008
	thousands of dollars				
Revenue					
Cable television subscriber revenue	213,068	234,342	281,410	324,838	380,712
Satellite television subscriber revenue	168,405	168,956	192,164	209,980	208,694
Sales of air time					
Local	.	.	.	.	.
National and network	.	.	.	.	.
Sales of air time, total	.	.	.	.	.
Total production and other	2,902	6,497	8,751	12,735	22,622
Operating revenue, total	384,375	409,795	482,325	547,553	612,028
Expenses					
Program cost	224,088	227,419	269,063	322,841	350,486
Technical services	12,705	11,898	12,985	16,643	23,526
Sales and promotion	28,580	25,063	28,160	35,701	33,327
Administration and general	24,182	24,781	27,629	35,212	43,264
Depreciation	9,352	12,651	19,680	20,690	24,885
Operating expenses, total	298,906	301,812	357,518	431,088	475,489
Profit before interest and taxes	85,469	107,983	124,807	116,465	136,539
Interest expense	3,099	4,405	5,207	13,271	12,031
Expenses, total	302,006	306,216	362,725	444,359	487,520
Net operating income	82,369	103,578	119,600	103,194	124,509
Other adjustments-income (expense)	7,930	10,791	17,610	21,434	26,329
Net profit (loss) before income taxes	90,300	114,370	137,211	124,628	150,838
Salaries and other staff benefits	19,514	20,206	21,466	27,010	35,002
	number				
Number of employees (weekly average)	299	294	327	382	469
	percentage of revenue				
Revenue					
Cable television subscriber revenue	55.4	57.2	58.3	59.3	62.2
Satellite television subscriber revenue	43.8	41.2	39.8	38.3	34.1
Sales of air time					
Local	.	.	.	.	.
National and network	.	.	.	.	.
Sales of air time, total	.	.	.	.	.
Total production and other	0.8	1.6	1.8	2.3	3.7
Operating revenue, total	100.0	100.0	100.0	100.0	100.0
Expenses					
Program cost	58.3	55.5	55.8	59.0	57.3
Technical services	3.3	2.9	2.7	3.0	3.8
Sales and promotion	7.4	6.1	5.8	6.5	5.4
Administration and general	6.3	6.0	5.7	6.4	7.1
Depreciation	2.4	3.1	4.1	3.8	4.1
Operating expenses, total	77.8	73.6	74.1	78.7	77.7
Profit before interest and taxes	22.2	26.4	25.9	21.3	22.3
Interest expense	0.8	1.1	1.1	2.4	2.0
Expenses, total	78.6	74.7	75.2	81.2	79.7
Net operating income	21.4	25.3	24.8	18.8	20.3
Other adjustments-income (expense)	2.1	2.6	3.7	3.9	4.3
Net profit (loss) before income taxes	23.5	27.9	28.4	22.8	24.6
Salaries and other staff benefits	5.1	4.9	4.5	4.9	5.7

Source(s): Canadian Radio-television and Telecommunications Commission (CRTC), Industry Analysis, Policy development and research sector.

Data quality

The statistics presented in this publication are for the following categories of the 2007 North American Industrial Classification System (NAICS): Television Broadcasting (51512) and Pay and Specialty Television (51521).

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.

The data presented in this publication are of very good quality and can 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. Definitions, data sources and methods are available for most surveys. The survey title is **Radio and Television Broadcasting Survey** (ID 2724).