

**NATIONAL PUBLIC
BROADCASTING BENEFIT:
FINAL REPORT***

**APPLIED ECONOMICS
20 April 2000**

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ON NATIONAL PUBLIC BROADCASTING BENEFIT: FINAL REPORT

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A) INTRODUCTION

- Broadcasting is a key sector in our society, not only economically but, more than most sectors, culturally, socially and politically. Yet the sector is changing. Ongoing changes in technology for broadcasting, information technology and telecommunications, including media convergence, are in train.
- The Australian Broadcasting Corporation (ABC) has always played a central role in the evolution of Australian broadcasting. The changes in relevant technology and the broadcasting environment point to a future role that is at least as important.
- There is core value to be derived from maintaining within the Australian broadcasting system a national sector that is publicly owned and funded, politically independent and fully accountable. Public ownership brings a distinct difference to the broadcasting system, with national broadcasters required and able to provide comprehensive, innovative programs not influenced by commercial imperatives.
- No matter how much programming and new delivery systems the new technology facilitates in the broadcasting sector, private provision is profit derived and driven. New technologies can be harnessed to provide more programs and services. However, more outlets and activities will not in themselves provide sufficient diversity, innovation, credibility, regional impact or Australian content for the public interest to be met. This is because commercial broadcast services will still be driven by profit incentives. The pervasive and persuasive nature of broadcasting makes a major national public broadcasting presence even more essential in an increasingly globalised broadcasting world in which audiences are likely to be more fragmented.
- Crucial conditions for national public broadcasting to fulfil its role effectively in these circumstances are (Withers 1999):

- (a) appropriate access to the full range of production and delivery technologies to enable national broadcasters to achieve sufficient scale and scope to be able to participate alongside commercial broadcasters and datacasters in both traditional and new media;
 - (b) provision of statutory status to allow political independence, combined with accountability to Parliament, (and on specific matters, to the Auditor-General, the Ombudsman [in relation to administrative matters], Administrative Appeals Tribunal, the ABA [in relation to complaints covered by the Code of Practice] and under FOI and other relevant legislation); and
 - (c) guarantee of funding sufficient to ensure the national public broadcaster is able provide an innovative and comprehensive package of services, including traditional and new services, to citizens from its free to air networks on television, radio and online. This will ease national public broadcaster incentives to seek to restrain system innovation, and importantly also to ensure continued different pricing from the commercial systems.
- In this present report the capacity and performance of the ABC in meeting public broadcasting objectives efficiently and effectively is reviewed. It is shown that there is strong empirical evidence that:
 - (a) Australia's national public broadcaster can and does operate at lower unit cost and aggregate budget call than for domestic free-to-air commercial broadcasters and overseas comprehensive national public broadcasters, respectively.
 - (b) national public broadcasting can and does provide major distinctive benefits in comprehensive and specialised programming and innovation – though compromise in performance in some dimensions (eg reduced original first release Australian content) has

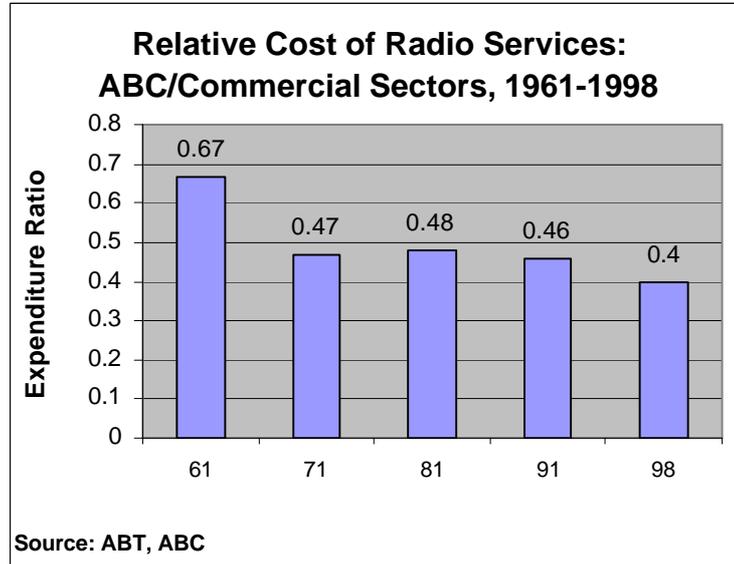
been a price paid in achieving the economies required by funding constraints for ABC operations; and

- (c) national public broadcasting can and does meet rigorous standards of public preference and support, as evidenced by thorough and independent taxpayer valuation studies as well as through conventional commissioned survey and interview analyses.

B) EFFICIENCY: COSTS OF PROVISION

- When assessing efficiency and effectiveness, prejudice can play as great a role as fact. Indeed there is a not uncommon view that public providers by definition must be more inefficient, more bureaucratic and less innovative than private firms. Yet this is manifestly wrong in the case of Australian national public broadcasting.
- For example, taking the case of radio, the cost for the national public broadcaster in putting an average broadcasting hour to air compared to the equivalent cost for the commercial sector as a whole is indicated in Figure 1, which covers the forty-five year period since 1961.

FIGURE 1

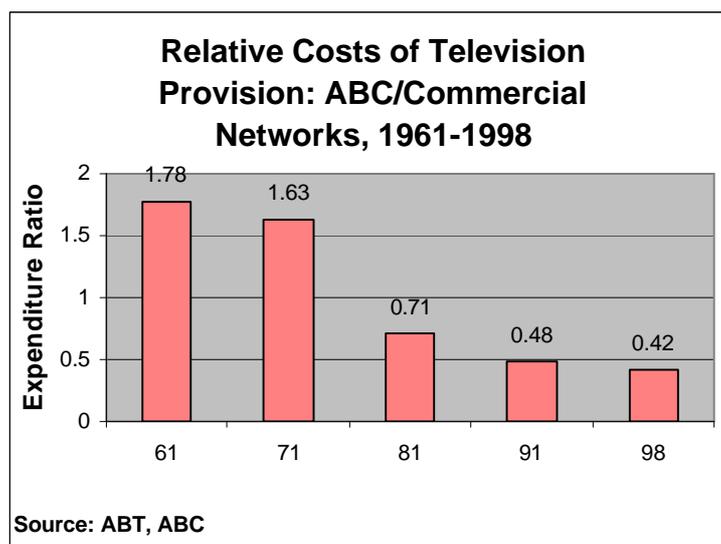


- It is seen that over the period of four decades ABC radio cost has declined consistently relative to the commercial radio sector. It is not surprising that the ABC should have some economies not available to commercial radio eg not needing to maintain marketing advertising departments. But the downward trend in relative ABC cost, not just its lower level, is an

important observation.

- The measure in Figure 1 is based on total expenditure in each sector divided by an average broadcasting hours per station in each sector. More complicated measures based on costs per station (rather than for each sector as a whole) can also be constructed, and they too show ABC cost to be consistently below commercial station costs (Withers 1982 updated).
- Similarly, if attention is switched to television, the ratio of ABC expenditure per average television broadcast hour compared to equivalent commercial expenditure averaged across the three networks is shown in Figure 2. A downward trend in relation to costs is also evident there.

FIGURE 2

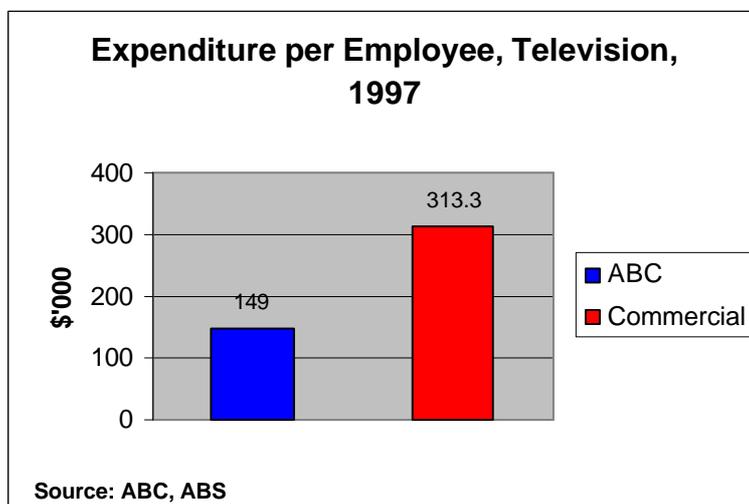


- As indicated for radio, an alternative benchmark is cost per station. If this calculation is done for the television networks, the comparative results for the ABC vs the commercial networks are as follows for 1998:
 - ABC: \$26.18m per station
 - Ten: \$46.39m per station
 - Seven: \$83.21m per station
 - Nine: \$88.59m per station

Again the ABC is seen as an efficient provider relative to commercial services, based on ABA Form 18S data for total service expenses for the commercials and the equivalent ABC data in the Annual Report, both being for the 1998 financial year.

- Other measures available for television similarly confirm this cheaper provision by the national public broadcaster. One further such alternative measure is total expenditure per employee. This is available for 1997 (but not yet since) because the Australian Bureau of Statistics gives commercial employee figures for that year, figures which are otherwise not easily obtainable. Dividing the total television expenditure for each sector in that year by the number of employees gives the picture illustrated in Figure 3. The full validity of this measure is in turn affected by any differences in full-time vs part-time work force composition and by any difference in the extent of outsourcing between the sectors, but the point to note is overall consistency across the range of all of these indicators discussed, despite individual problems with any one such performance indicator. The same applies to the significance of problems such as allocating ABC costs by media since the move to “One ABC” in 1996-97. In this report a “rule of thumb” using the last previous available ratio is adopted and applied to the subsequent years to give media split for the short period concerned.

FIGURE 3



- While the ABC's efficient performance relative to commercial broadcasters is in part explained by the absence of advertising transaction costs and by the requirement to respond to a reduced parliamentary appropriation, it can also be explained by the Corporation's own strategies. For example, the 'One ABC' policy of 1996/97 was directed at, among other things, better control of costs of corporate management. Similarly, substantial contestability has been introduced to enhance production costs comparison. Table 1 shows the decrease in operating expenses and employee numbers for financial years from 1996, covering the period over which these particular corporate changes took place. There is also a capacity for an organisation such as the ABC to benefit from the distinctive sense of purpose of its employees – which manifests in a willingness to work for less than commercial rates in many cases.

TABLE 1

ABC Operating Expenses (\$m) and Employees, 1995-1999

Year*	Operating Expenses	Employee Expenses (%)**	Employees
1995	698.7	45.1	5437
1996	719.8	45.7	5343
1997	707.1	45.9	4887
1998	631.2	43.2	4177
1999	664.7	43.2	4134

*Note formation of "One ABC" in 1996-97

** Covers remuneration and leave entitlements. Note role of retirement/termination payments sustaining employee costs in 1996-97.

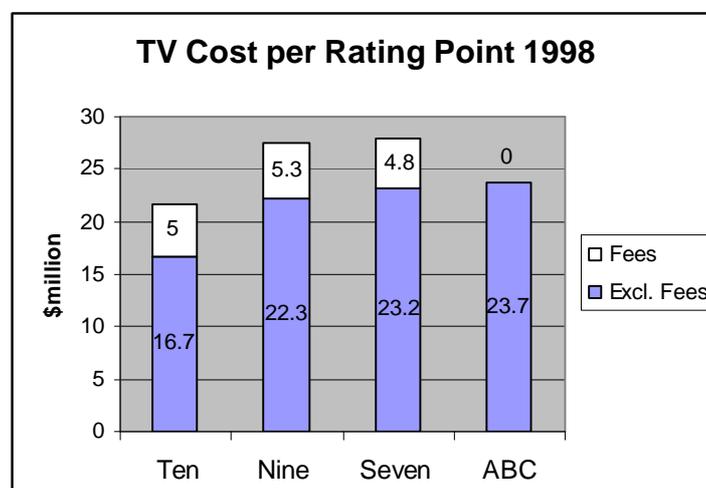
Source: ABC

- A further output measure relative to cost is ratings (audience) per dollar expended. This goes beyond the physical output measures used in Figures 1 - 2 and beyond the financial input measures used in Figure 3 and Table 1 and it avoids some of

the definitional problems therein and now takes additional account of audience levels. Yet the ABC is required by its Charter to be comprehensive, providing a balance between broadcasting programs of wide appeal and specialised broadcasting programs. Commercial broadcasters have no similar constraint upon their imperative to pursue mass audiences. It is notable that despite this, the ABC is highly efficient in achieving ratings. (Figure 4)

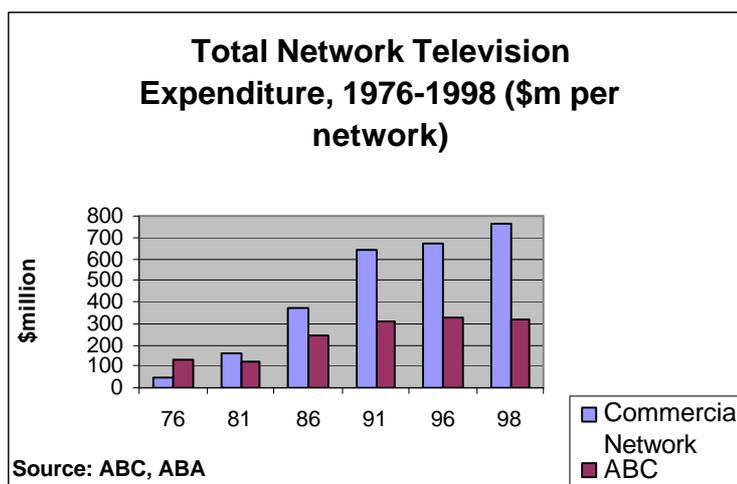
- The ABC also reportedly is quite successful in relation to the comprehensive “reach” that can lie behind these ratings in turn. An AC Nielsen survey conducted at end 1998 is reported as finding that 70% of the population use the ABC television service each week, 24% use an ABC radio network each week and 2.4% use the ABC website each week. (Communication Law Centre, 1999, p. 15)
- Figure 4 shows cost per rating point for ABC television and for each of the commercial networks. For 1997-98, on a full service expense measure, ABC and Ten Network costs per rating point are quite similar and both are well below the Seven and Nine Network costs per rating point. Even if fees and commissions which apply only to commercial stations are excluded, the ABC is quite comparable in cost to the Seven and Nine networks, though it is now higher in rating cost than Network Ten.

FIGURE 4



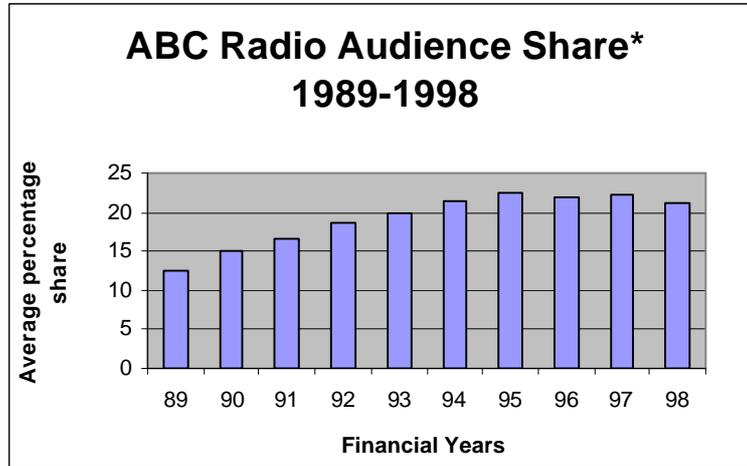
- ABC television cost per rating point has not always been on par with that of commercial networks (Withers 1982). This particular position of cost comparability for the ABC dates basically from the mid 1970s, at which time there was a major escalation of commercial expenditure relative to that of the national broadcaster. The relative expenditure position has been stable since the mid 1980s, with the commercial networks remaining on the higher expenditure trajectory established in the early 1980s and with ABC outlays constrained at a lower level. (See Figure 5)

FIGURE 5



- This analysis reflects the position for television. The same cost per ratings unit is not available for radio, but it would be likely to show an even stronger outcome, as ABC radio audience share has increased substantially to higher levels over the past decade – as is seen in Figure 6.

FIGURE 6

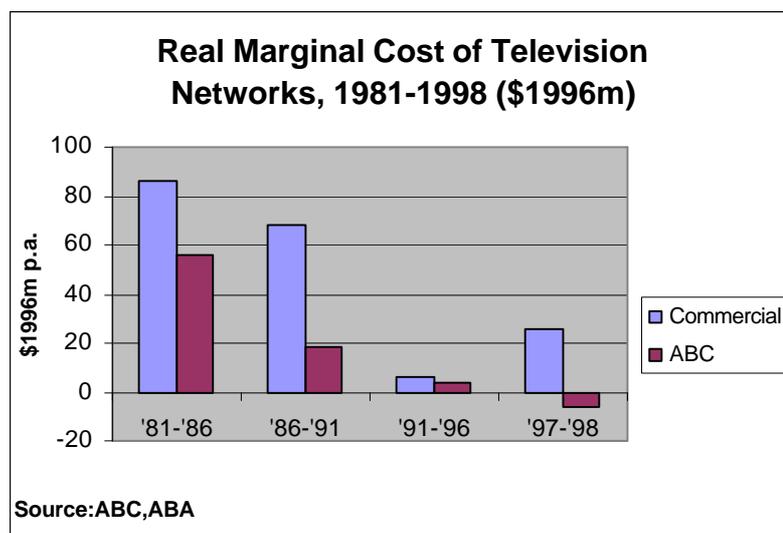


* average audience share, ABC radio, capital cities

- Both national public and commercial sectors have restrained television cost growth substantially since the late 1980s. For the ABC, once the basic national public broadcasting infrastructure for comprehensive service was in place, this then allowed annual marginal cost of maintaining and extending its services to fall from \$92 million in the early 1980s and \$31 million in the later 1980s to \$9 million in the early 1990s. In recent years the real marginal cost of providing ABC programs, services and outlets has become negative.
- This marginal cost measure reported here is simply the average annual increment to total operating expenses for ABC television for each time period indicated. It is further expressed here in constant 1996 dollars to allow absolute dollar comparisons to be made more meaningfully over time. The calculation thus involves measuring the change in total television expenditure for each year, converting that to constant dollars using the consumer price index and taking an annual average for each period of concern.
- If this ABC pattern is compared with the commercial sector a downward trend in marginal cost is also observed there, though with continuing cost efficiency advantage evident for the ABC. Figure 7 shows the marginal cost of providing television network programs, services and outlets for the two sectors, measured

as an annual average for commercial networks (averaged over three networks) and for the ABC television network respectively. The evident decline in the marginal cost is dramatic and the contemporary capabilities of both ABC and commercial networks to operate at low marginal cost are manifest.

FIGURE 7

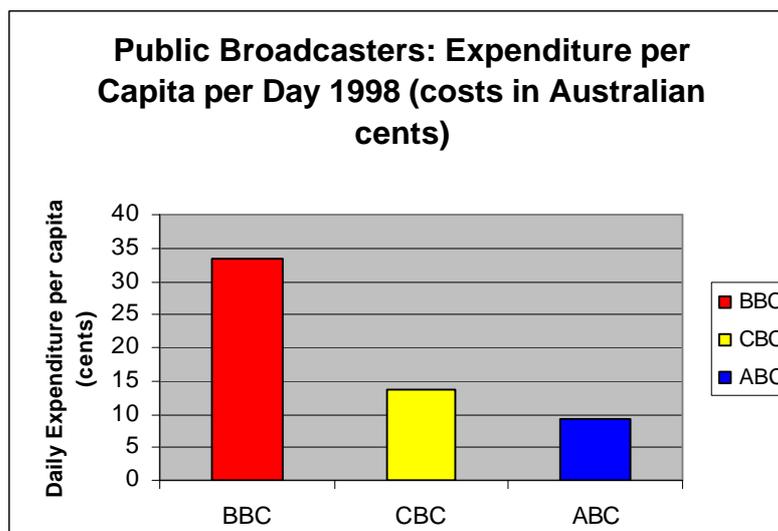
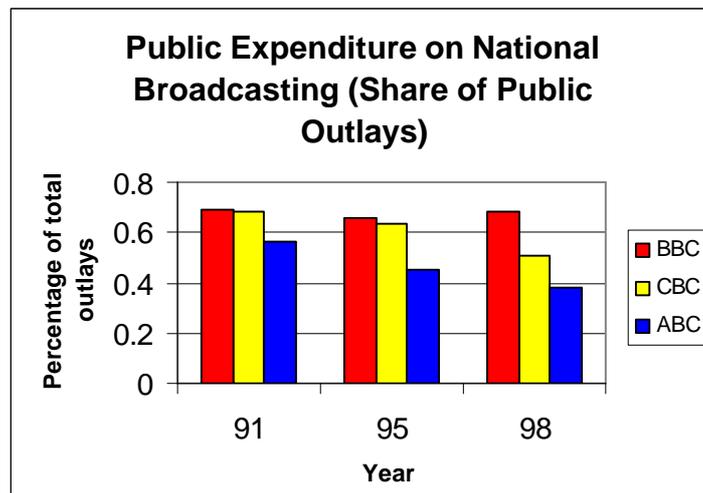


- Indeed in the case of the ABC a reduced marginal cost has been consistent with growing radio and television audiences, 24 hour broadcasting in both radio and television, expansion of regional studios, substantial expansion of Triple J radio across Australia, Open Learning programs, and establishment of both Newsradio and ABC Online. A past capacity to extend service at low cost building on basic core capability, has therefore been demonstrated – though it is not necessarily inexhaustible, a matter considered further below in relation to areas such as Australian content and localism.
- Finally, in terms of efficiency and effectiveness, it is useful to avoid the problem of comparing “apples and pears” that bedevils commercial vs public broadcasting comparisons, and to move instead directly to comparing like with like. A useful application of this approach is to compare the ABC with public

broadcasters in countries such as Britain and Canada. A range of measures can be chosen. But all point in a similar direction. For instance, Figure 8 provides data for government expenditure on the national broadcaster as a share of public outlays and for expenditure per capita per day for those broadcasters in 1998, as extracted from a report by McKinsey and Company (1999).

FIGURE 8

INTERNATIONAL PUBLIC BROADCASTER COMPARISONS, 1997-98



Source: McKinsey and Co.

C) EFFECTIVENESS: NATIONAL BENEFITS

- Moving beyond and/or behind the aggregates, it is also important to consider whether public broadcasting serves the public interest well *via* the form and content of its activities. This is a subjective call in the end, but there are clear measures and indicators that can help form a basis for informed judgement . They include:
 - (a) program diversity
 - (b) innovation
 - (c) regional impact
 - (d) Australian content
- This section of the report provides some further illustrative documentation of this contribution. It does not include benefits of a kind not easily or systematically quantifiable, eg credibility and authority in news and current affairs. Yet such excluded matters may be just as important or more important, and so should also be factored in as part of any subsequent deliberation beyond this report. Indeed in an era of growing media outlets, especially on-line, a qualitative editorial function of a national public broadcaster may be one of the key national benefits, yet one that is hard to quantify.
- The ABC Charter requires **program diversity**, in setting out the requirement that the ABC provide innovative and comprehensive broadcasting services of a high standard. Comparison of television content analyses over time shows that while ABC and commercial television content breakdowns have changed, ABC television programming has consistently been more broadly spread across content categories than that of the commercial channels. The Australian Broadcasting Tribunal published useful analyses of television programs by categories until 1991. Any updating requires data to be extracted from

other sources. Table 2 shows the situation for television as at the last publication of ABT analyses for selected years and for the broad categories available. Program allocation to categories is that of the individual broadcaster operating under ABT guidelines.

- For television, it is seen in Table 2 that while the ABC provides a comprehensive offering, including drama, light entertainment and sport, it also provides specialised programs as it is required to do under its charter – notably in key areas such as children’s, the arts education and information programs.

TABLE 2

**Television Program Content
ABC vs Commercial, 1970-1991**

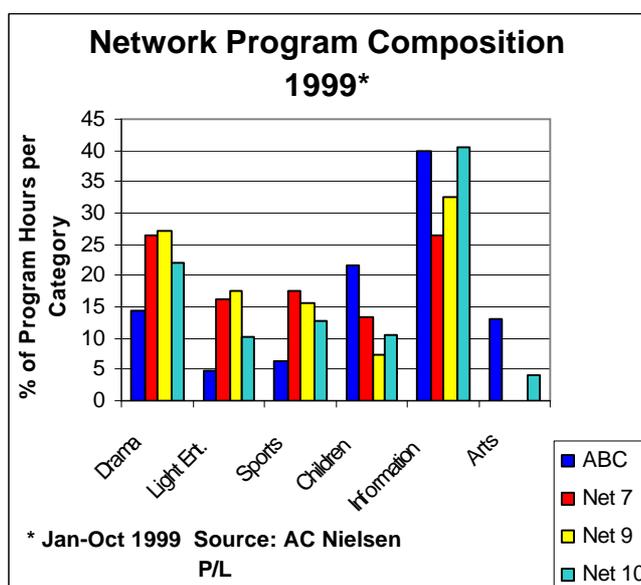
	COMMERCIAL					ABC				
	1970	1975	1978	1986	1991	1970	1975	1978	1986	1991
Drama	53.1	55.5	52.1	40.4	36.7	31.6	20.4	17.8	12.1	12.1
Light Ent.	26.7	19.8	23.5	12.9	18.5	11.7	7.7	10.7	9.6	8.0
Sport	5.4	5.8	8.4	11.2	10.2	8.9	16.1	16.0	12.3	12.3
Children	10.3	12.9	9.2	14.9	14.3	12.5	22.5	22.1	23.5	28.0
Information	4.1	5.2	6.5	20.3	18.8	14.9	14.9	19.5	23.1	27.0
Arts	0.0	0.1	0.1	0.0	0.0	2.3	1.2	1.6	4.9	3.0
Education	0.4	0.7	0.2	0.2	1.7	18.1	17.2	12.2	14.5	9.6
	100	100	100	100	100.0	100	100	100	100	100.0

Source: Withers 1982; ABA.

- Of course such broad program category comparisons suppress a range of sub-category differences (and classification

discrepancies) and a range of issues regarding quality and innovation in programming. For instance, here light entertainment includes entertainment **and** comedies; drama includes drama **and** movies; and information includes current affairs, documentaries, features and “specials”, news and religion. By taking averages across all commercial networks, difference within commercial television is also hidden. This latter at least can be better considered in data that are available for program composition for the year to end-October 1999. This is seen in Figure 9 which contrasts ABC program structure with that for each of the commercial networks. The ABC retains a distinctive emphasis in programming in the children’s and information/education areas, with ongoing decline in the program share for light entertainment and sports.

FIGURE 9



- These data relate to television. There is also the question of radio program diversity. The 1999 ABC Annual Report shows the spread of program content there and Table 3 gives this for the most recent available year. However comparable commercial content was not available for this report.

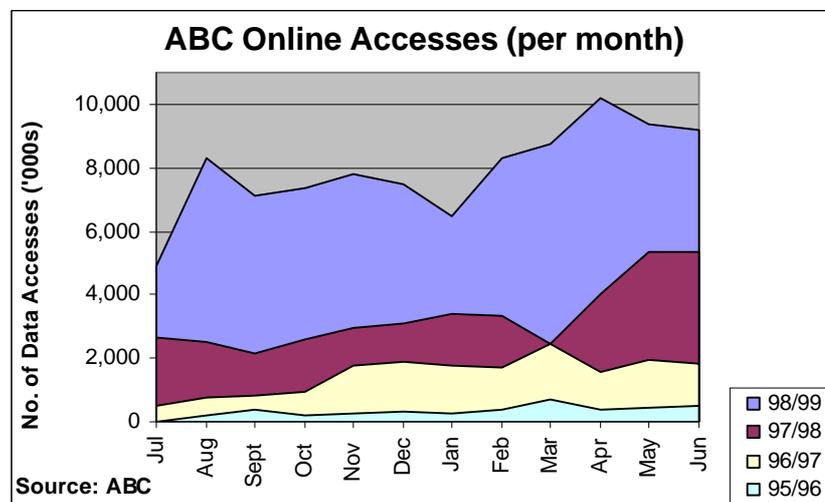
TABLE 3**ABC Radio Program Diversity, 1999
(Percentage of broadcast hours per station)***

Program	Radio National	Classic FM	Triple J	News Radio	Metro Stations	Regional Stations
Topical issues	16.7	0	8.3	0	65.8	61.8
News	9.3	3.9	3.1	88.1	11.7	12.2
Classical Music	1.1	66.5	0	0	0	0
Contemp'y Music	0	0	74.0	0	0	0
Current Affairs	13.2	0	0	1.4	9.2	9.2
Specialist Music	19.4	10.0	9.5	0	2.7	2.8
Sport	0	0	0	3.0	7.8	8.0
Specialist	16.8	0	0	1.7	0	0
Live Music	1.1	16.8	0.9	0	0	0
Arts	9.6	0	2.4	0	0	0
Parliament	0	0	0	5.8	0	0
Rural	2.0	0	0	0	0.3	3.6
Religious	4.0	1.1	0	0	2.4	2.4
Arts Performance	2.0	1.7	0	0	0	0
Open Learning	3.0	0	0	0	0	0
Comedy	1.8	0	1.8	0	0	0
Total	100.0	100.0	100.0	100.0	100.0	100.0

* Station averages for metropolitan stations; State/territory averages for regional stations

- In terms of **innovation**, the changing technology encapsulated in phrases such as media ‘convergence’ and the ‘digital age’ means that adaptability and flexibility in such an environment are of the essence. Certainly, innovation is required of the ABC and its ability to be innovative will assist it to navigate the new media landscape effectively. The ABC has shown considerable initiative and creativity in these directions. The ABC reorganisation, as for instance in 1996, was also driven in part by a need to adapt to the convergence in which borders between mediums were becoming increasingly blurred. Thus the ABC moved beyond terrestrial radio and television, and quickly added on-line services to its portfolio and has emerged as a favoured web site. ABC Online accesses have grown rapidly (doubling in 1999 alone) and ABC sites are amongst the most frequently accessed sites in Australia. Figure 10 shows the growth of ABC Online accesses from 1995-96 to 1998-99.

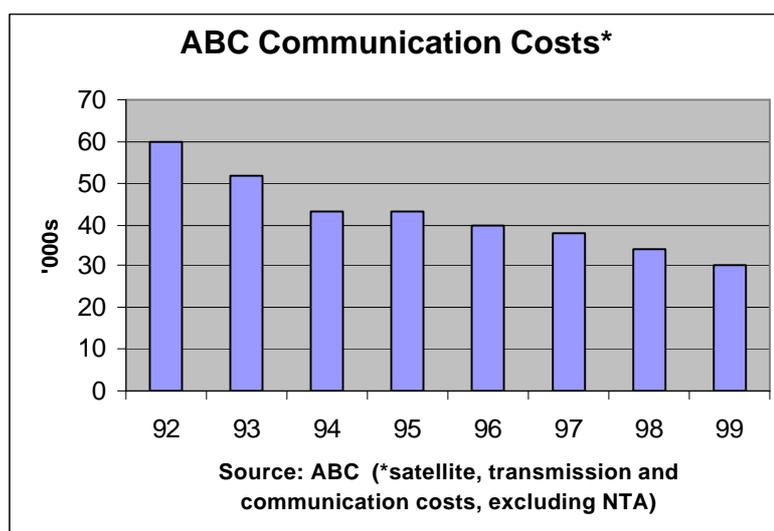
FIGURE 10



- The ABC itself has also shown a distinctive capability in developing new production technology. For example, innovation by the ABC in digital cartridge and digital radio systems and computer controlled console systems have allowed it to claim leadership in efficient use of such production and presentation technology. Equally, ABC adoption of general international technology has been accomplished very

economically, as is also seen in Figure 11 which shows movements in the 1990s in ABC communications, satellite and transmission costs.

FIGURE 11

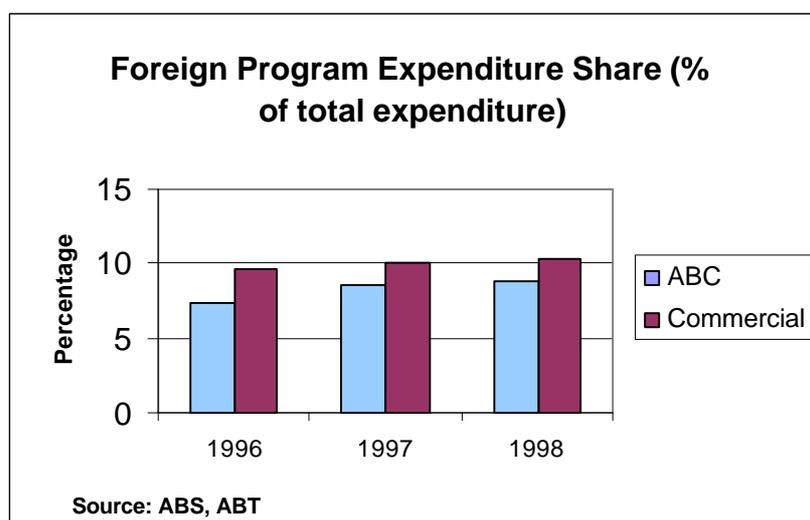


- Finally, innovation in program content could and should also be considered, but it falls into that category of performance evaluation that is difficult to quantify in the systematic manner that is otherwise the requirement for this report.
- On the **regional question**, in fulfilment of its national responsibilities, the ABC provides programs and services Australia-wide. This has included substantial provision of rural and regional programming, including online services. This contribution is most notable in radio, with local radio services in 57 locations across the country. In 1999 local radio production increased from more than 62,000 to over 66,000 hours of local content, plus local news and sport. Increasingly, regional audiences are also served by the ABC harnessing new technology to upgrade regional stations into multimedia centres providing local content across a range of mediums. The introduction of digital broadcasting including datacasting will enable the ABC to provide local audiences with a range of programming across several mediums and outlets.
- Australian Bureau of Statistics data show that, for the latest

available year of 1996-97 and compared to the independent film and video production sector, the ABC has much more dispersed employment across Australia - 34 per cent outside NSW and Victoria, as opposed to 14 per cent for the independent sector. However, on the other hand, commercial free-to-air radio has 39 per cent employment outside NSW and Victoria and commercial free-to-air television 47 per cent (ABS, Cat. No. 8679.0, 8680.0, 1996-97). Of course, these figures include non-national broadcasters and focus on labour inputs and not program services. But it is *prima facie* of significance that 41 per cent of the Australian population is outside of NSW and Victoria, a significantly higher share than the 34 per cent recorded for ABC employment. That said, there are ABC 'head office' staff attributed to NSW who are in fact based in other states. But, equally, the ABS measure for commercial broadcasters excludes some Tasmanian and Territory data. These regions account for 9.7% of ABC employment, by contrast. Further analysis is called for to resolve this issue, if the employment (as opposed to program) content of 'localism' is considered important.

- In terms of **Australian content**, one clear picture comes from comparing the Australian Broadcasting Authority financial results for commercial television stations with those from ABC financial data. The ABC has a consistently lower share of all television expenditure devoted to purchase of foreign product, as is seen in Figure 12.

FIGURE 12



- An alternative to using expenditure shares is to look instead at Australian content shares in program transmission. This is important because in the period to 1990, ABT and ABC data show that the Australian share of all TV programs for the ABC was lower than that for the commercial stations. Table 4 summarises these data as available to 1990.

TABLE 4

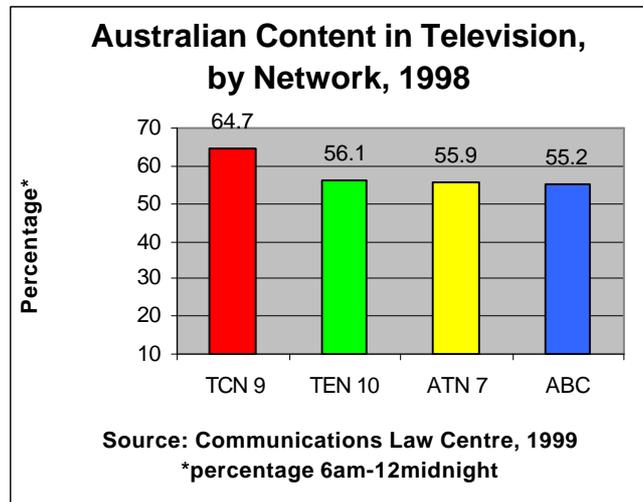
Australian Content on Television, 1985-1990

	Commercial	ABC
1985	52.8	49.6
1990	53.8	50.9

Source: ABA, ABC; (percentage of all Programs 6 am to midnight)

- More recent data show some improvement in the ABC position. (Figure 13) The ABC now performs at about the same level as two of the three commercial networks, ie the ABC, Channel 7 and Channel 10 all have around 55/56% Australian content, while Channel 9's is much higher - presumably because of sport. It also suggests that the gap between ABC and Channels 7 and 10 has closed since the earlier numbers in Table 4. Such broad indicators do need some finer dissection to determine repeat shares *etc.* Also the ABC role in sub-sectors, such as education and children's programs, is likely to be quite different from the picture given by the aggregate data. The difficulty is in obtaining the comparative program content data for commercial television differentiated by detailed sub-categories and local content.

FIGURE 13



- On commercial radio Australian music performance (quota) shares range from 5% for specialist formats to 25% for contemporary rock formats. By contrast for the same period, 1997-98, Australian music results for the ABC range from 25% on Radio National, 27% on ABC Classic FM to 31-34% for Metro/Regional to 36% for Triple J. (Communications Law Centre, 1999) On the radio front the ABC is therefore better practice on Australian content than is commercial radio.
- Naturally, content can also be evaluated in other areas such as on-line. But comparative data are hard to pin down for this purpose.

D) PUBLIC VALUATION

- Efficiency measures and impact measures are partial indicators of effective use of national resources in public broadcasting. But in the end it is the users of ABC services and the tax payers who fund these services, who are the appropriate arbiters. And, in this context, standard qualitative survey techniques have found widespread and consistent support for the ABC contribution.

- The most recent such (Newspoll) survey was for December 1998, and found that:

i) 88 per cent of those surveyed rated the ABC and its services as valuable to the Australian community

and that for all answering respondents

(ii) 86 per cent rated ABC television programming as good, compared to only 44 per cent for commercial television

(iii) 81 per cent felt the ABC did a good job at providing television programs they personally liked to watch – as opposed to 50 per cent for commercial television

(iv) 89 per cent rated ABC radio programming as good quality compared to 66 per cent for commercial radio

(v) 85 per cent thought ABC radio did a good job in providing the amount of programs they liked to listen to as opposed to 66 per cent for commercial radio.

- In a separate survey (AustraliaSCAN 1999) respondents were asked how satisfied they were with various public services – 82 per cent per cent said that they were satisfied with the ABC. Respondents were also asked whether the quality of services was improving, getting worse or the same compared with a year ago and, based on net results, the ABC's quality of service was

considered to have improved. That of most other service providers was not.

- In 1994 quantitative research measured client and taxpayer appreciation of services, in dollar terms. In an independent study of public budget outlays in Australia, the Economic Planning Advisory Commission established public willingness-to-pay for the various taxpayer funded activities of government. The EPAC study controlled for a full range of flaws and biases common in less rigorous studies. Of relevance to the ABC was that the study found the following: the mean willingness to pay through taxes for arts and public broadcasting support (\$129) exceeded the then mean liability for these activities (\$121) by 7 per cent per taxpayer. Unlike other areas, such as family assistance, defence, unemployment benefits, general government, general industry assistance and the like, where decreases were indicated, in the arts and public broadcasting field an increase would be supported, though, it should be noted, the ABC's parliamentary appropriation was in fact subsequently cut not increased – so potentially increasing the gap between citizens' preferences and politically determined budget appropriation.
- A growing gap between taxpayer preferences and ABC budget has in fact been confirmed in recent quantitative research updating the earlier EPAC analysis. March 2000 data in the National Social Science Survey indicate a mean willingness to pay for the ABC itself of \$48 per head versus an actual outlay in 1994 of \$37 per head. The gap here is therefore 30 per cent. Table 5 illustrates further the support for ABC funding and its growth over time.

TABLE 5

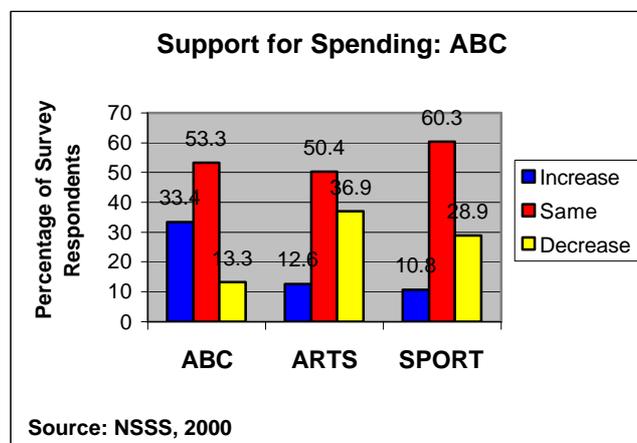
Willingness to Pay: Public Broadcasting, 1992-2000

	1992	2000
Increase	28	34
Same	50	53
Decrease	22	13

Source: EPAC 1994; National Social Science Survey 2000

- It is also instructive to contrast support for the ABC with related areas of endeavour of comparable expenditure magnitude. Figure 14 shows the spending support findings for the ABC, compared to arts and sport. A very limited constituency is seen here to exist for cuts to the ABC and a sizeable group want increases, in contrast to the case of arts or sport. The strong public valuation of ABC services therefore is very evident in these findings.

FIGURE 14



E) LOOKING FORWARD

- The picture emerging from this review of salient data on the issue of public benefit from ABC public broadcasting is that the ABC is a highly efficient broadcaster by both domestic commercial and global public standards.
- It also well serves the public interest through the composition of its activities especially in areas such as program diversity and innovation while, inevitably, leaving room for improvement.
- The public is demonstrably satisfied that its tax support for public broadcasting is warranted and, indeed, there is rigorous evidence of support for an expansion of funding in this area.
- There are dangers that efficiency for the ABC is coming at a growing cost in terms of some indicators of public benefit such as Australian content.
- There are also dangers for the future as broadcasting technology changes, if a comprehensive public broadcasting presence across existing and new mediums is not maintained.
- Substantial ongoing public benefit from public broadcasting via the national broadcaster will be delivered if there is appropriate funding support, respect for political independence combined with parliamentary accountability, and full access to the new delivery platforms created by the use of the new digital spectrum and other distribution mechanisms (Withers 1999).

Note on Sources:

The primary sources of data for this report are the annual reports of the Australian Broadcasting Authority (and its predecessors the Australian Broadcasting Tribunal and Australian Broadcasting Control Board) and of the Australian Broadcasting Corporation (and its predecessor the Australian Broadcasting Commission), along with several related specialised publications, notably *ABT Broadcasting in Australia* and *ABA Broadcasting Financial Results*. Where a source in tables and figures is given as ABA or ABC, the data are derived as above – or from direct supply by the ABC. Years are financial years unless otherwise stated. The additional references used or cited in the text are:

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