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REGIONAL ARTS  
NSW

Submission:

Inquiry into the business case for the NBN and the experiences of small businesses

Prepared for:

Joint Standing Committee on the National Broadband Network

15 September 2020

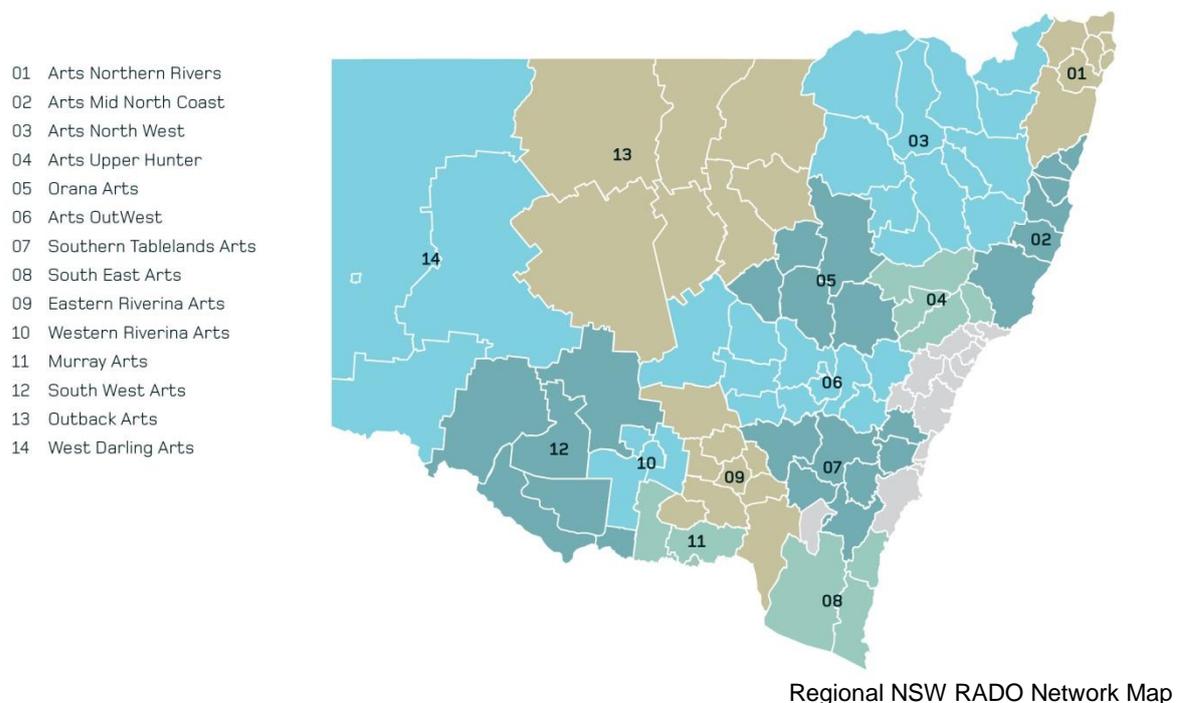
**Contact:**

Elizabeth Rogers  
Chief Executive Officer  
Regional Arts NSW Ltd  
The Arts Exchange  
Level 1, 10 Hickson Road  
The Rocks NSW 2000  
E: [elizabeth@regionalartsnsw.com.au](mailto:elizabeth@regionalartsnsw.com.au)  
M: 0412 099 935

## Introduction

Regional Arts NSW (RANSW) is the peak body and service agency for arts and cultural development in regional NSW. It is a non-profit company, formerly known as the Arts Council of NSW and 2020 is the 74th year of operation. It receives core funding from the NSW Government to provide support services to a network of 14 independent regional arts development organisations (RADOs) based in regional communities across the state.

The network of RADOs covers about 90% of NSW. Each RADO provides arts and cultural services across a number of LGAs in each region. They develop strategies, partnerships and arts projects across all genres that best meet the needs of their particular region. RANSW is uniquely situated, through its close relationship with the network, to obtain first hand, grassroots information about all matters that impact on the arts and cultural sector across the state.



For artists and arts organisations in regional NSW, the impact of the COVID-19 pandemic was exacerbated by the 2019/20 bushfires that started in early spring in northern NSW and raged down to the Victorian border throughout the summer, destroying artists' and arts workers' property and livelihoods, leaving devastation in its wake for regional economies that depend on seasonal tourist visitation. Attempts to restart were cut short as pandemic restrictions were imposed.

From 13 to 25 May, 2020, RANSW surveyed regional artists and arts organisations in order to understand the impact of COVID 19 on their arts practice and business. This survey indicated that the two greatest impacts on this sector were **social distancing** and **access to the internet or NBN**. Artists and arts workers were working from home and attempting to adjust their business models to a world where the normal avenues of income generation were no longer available. The ‘pivot to digital’ to generate on-line sales and audiences in businesses in lockdown was not feasible in regional NSW. Anecdotally RANSW team members dispersed across the state know from our own experiences in moving all face to face meetings to Zoom how variable internet services are.

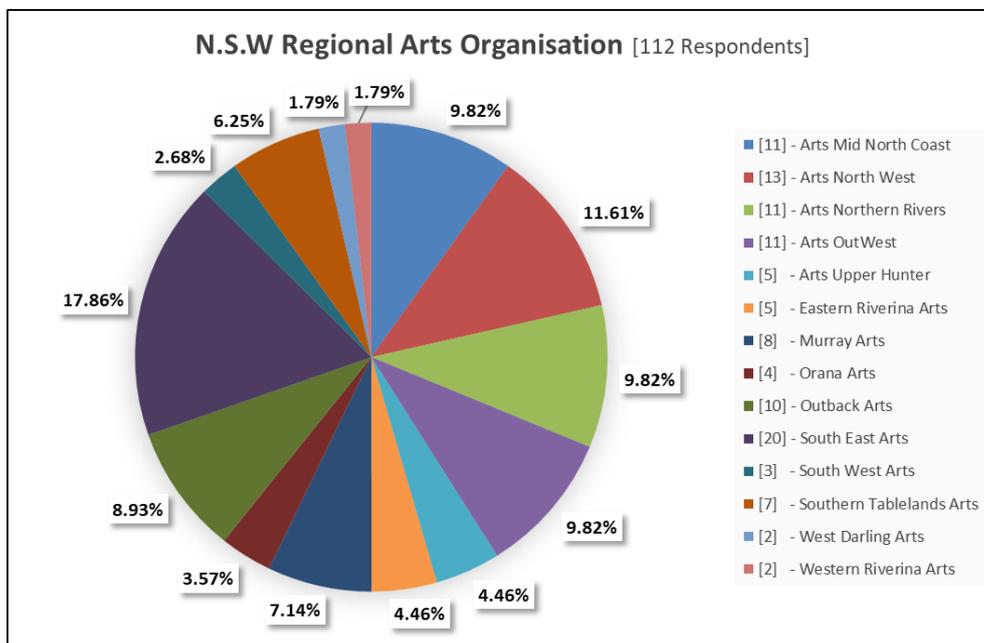
Subsequently, RANSW developed a second survey to unpack the issue of access to the internet/NBN and to understand the reported frustrations of the regional arts sector. . A survey titled *NBN & online connectivity within the NSW regional arts network* was distributed via Survey Monkey over the period 18 August to 4 September 2020.

Following is a summary of the responses with a selection of the comments in italics. At the end of this submission are graphs containing additional data collected.

## Summary of Results

### 1. Location

From the responses 53% were received from those living in a regional town and 44% living in a village (under 2000 population) or a rural area. 58% were from arts organisations and 42% from individuals. It needs to be noted here that many people working in this sector are broadly categorised as ‘arts workers’ – these include a high number of people who provide support services to artists and arts organisations often self employed, casuals or contractors. As an example, a visual artist may have been commissioned to produce work for exhibition in a regional gallery, but there will be a highly skilled team of people with a diverse range of skills employed to get the exhibition catalogued, hung, open and marketed. Theatres and performance venues also employ a large range of people for administration, front of house and backstage roles.



Responses came from all over regional NSW and 69% were working from a home office or studio. COVID 19 has sparked a huge spike in demand for online connectivity with 69% needing online connectivity for more than 50% of their work, and 32% needing it for 91-100% percent of their work. A similar result is evident for engagement with audiences and customers. There is a general sense that post-COVID restrictions, there will still be a larger percentage of work delivered online than there was before the pandemic.

## 2. Overall availability of internet services

There are 11 internet options for regional NSW. For our respondents:

- 27% are subscribed to NBN (FTTN)
- 15% NBN (FTTC)
- 13% NBN Fixed wireless
- 13% ADSL1/ADSL2 wired or landline
- 13% mobile network connection (3G/4G)
- 8% NBN satellite
- 7% NBN (FTTP)
- 1% NBN (HFC)
- 1% ADSL1/ADSL2 dish to satellite
- 0% NBN (FTTB)
- 2% indicated 'other'

*I live 1 km away from an NBN fibre network, but the wrong side of the highway, therefore classed rural, hence abysmal upload speed, almost impossible to upload video to social media.*

*The area where our office is located is 1km from the Albury CBD and 3 km from the Wodonga CBD. It is a cultural hub of community & volunteer organisations. We are all tenants of City of Wodonga. COVID-19 has really escalated the lack of access we have to adequate communications, with majority of employees having to work from home as ZOOM meetings are not possible on our island. It is really frustrating and at this stage no council or state government is willing to fix the problem so we are planning on moving, to where the rent will be higher but at least we will have access to fixed NBN if we move 1km across the river/border.*

For those not currently using the NBN, 24% have applied, 24% intend to apply, 14% do not plan to apply and **for 38%, the NBN is NOT available**. For those with NBN network connections, 68% have been connected for less than 2 years. For those who have applied for an NBN connection more than 20% have waited more than 12 months, while 40% have been waiting 6-12 months.

*I was advised I was getting the NBN service 3+ years ago. During this time I have been required to pair my internet through my mobile phone each time I need to send large files to clients. I only received the NBN last month and already we have had a planned outage. The various contracted NBN workman (who have been working/sitting for long periods of time in their vehicles in my street on and off for well over 12 months) advised their contract was due to end Jan 2020 so I should have had the NBN earlier this year. Once the NBN was available in our street Telstra (instore) were not willing to assist*

*either.*

*We have no service at all here - we have to travel 40 kms to get a signal sufficient to use our devices usefully*

*I have also applied for satellite NBN but also not available...too many trees and hills.*

*Parts of the south west region rely on satellite for internet connectivity yet they are not remote or isolated communities, they are just small. Mobile internet connectivity is not available at all outside towns. Mobile phone coverage is intermittent at best outside towns. The further west we travel the more likely that phone service is emergency only until you reach a town*

*The reason I have not applied for Satellite NBN (that is the ONLY offering here) is because I need to upload films, which would exceed the satellite cap. Also, I do a lot of interactive activity for which satellite is unsuited due to lag. Generally I need to go into town but this has been hard to find a suitable place since COVID*

62% agreed that there has been an improvement to their internet services when they switched to the NBN but only 6% considered it to be far superior to their previous internet service. 53% were less than satisfied with the NBN network, while 17% satisfied and 32% more than satisfied.

*Fibre to the premises is far superior in speed and reliability and costs the same for the consumer*

*Before we had the NBN the speeds were slow, slow, slow. Since we have had NBN it significantly better than what it was, however since it was so bad in the first instance it is all relative. It could be much faster and consistent in the service. Great that it is better than it was, however, it is NOT WORLD CLASS. It is however what we have got!*

*NBN is a game changer for regional Australia*

*NBN service is neglected in Rural Areas of Australia as is mobile*

*I am very lucky to have NBN to the premises. I work from home more than in the office, and mainly because my internet is way better here. Often I do considerable uploads/downloads for the office*

### **3. Connectivity issues**

During the COVID 19 crisis, three quarters of the respondents reported connectivity issues. 67% have issues with speed, 43% with capacity and 19% with supply. 82% reported they had received no additional support from their provider. The regularity of disrupted

connections forcing people to stop working was an issue, with only 2.5% reporting their service never goes down. 28% reported disruptions more than once a week, 11% about once a week and 19% at least once a month. A further 65% reported daily variations in the regularity of speed for both upload and download.

*At home where I do the most of my online art, connection is intermittent which is hard when you are trying to start an online business to sell your artworks.*

*The quality of my internet connection is frustrating, and is a major hindrance to my business operations*

*Upload internet speeds make video meetings almost impossible*

*It provides daily challenge, we often have the stream from our phones (also limited phone reception)*

*I disconnected my NBN in June, as download and upload speeds were as much as 30 times worse than mobile WiFi (often 1mbps). My mobile WiFi has deteriorated significantly in the last 2 months, and despite using both Telstra and Optus carriers for my 2 services, the speeds are poor but the constant instability is unworkable*

*Internet connection is quite OK. It is the slow speed applicable to typing anything - sometimes you have to wait for the internet to catch up*

*Can barely run a business with internet connection too slow so now rely on 3G phone service which is also not great and often phone lines/tower completely out so have no form of communication*

*Our organisation has depended heavily on delivery of online programs. In addition to issues at our primary premises, students in rural and regional areas regularly don't have sufficient internet and many have withdrawn from lessons as a result of technical issues*

*As a commercial artist working with brands across the country the lack of upload speeds that got reduced in my area in late 2019 are particularly frustrating – I rely on delivering artwork files to clients in a timely, professional manner and since then, I've had some frustrating deadlines, large files and a lack of upload speed to contend with. Had the NBN delivered fibre to the premises like originally planned, our country would not be lagging behind (we're currently in 62nd place). With COVID suddenly highlighting how important the internet is for the economy, my hope is that fast, affordable internet for all will be seen as a basic economic tool for future-proofing artist's (and other local businesses) livelihoods*

Natural disasters are a further challenge for users in regional NSW with 30% losing connectivity due to bushfires, 15% due to floods and 51% due to storms. Up to 12% of users are still affected with poor to non-existent connections caused by fires, floods and storms.

#### **4. Affordability and value**

Most regional users have either a post paid internet plan, mobile phone plan or bundle (84%), with the balance using a pre-paid service. 77% reported no issues with billing or charges while 18% reported cases of over charging, late charging or charges for services not provided. While 24% considered their internet service affordable, 49% had varying degrees of concern about the cost and a similar proportion rated the value of their service average to poor.

*As I use mobile RG modem wifi internet, the connections fail weekly due to the winds blowing between Culburra Beach tower exchange and Greenwell Point tower exchange. NBN is very expensive to have lines connected to the premises, unable to afford right now due to COVID*

#### **Conclusion**

Although this survey directly targeted the arts and cultural sector in regional NSW, the results can be extrapolated across the broader regional small business sector. It clearly demonstrates the urgent need for a reliable, fast and affordable internet service that will support regional businesses into the future. The impact of the COVID-19 pandemic and the accompanying restrictions to normal operations to ensure the safety of the general public has forced the expedited use of the internet in ways unimaginable prior to the pandemic. It has also revealed significant shortcomings in the quality and reliability of the NBN for those living and working in regional NSW. As the world economy contracts and businesses are forced to move to an online environment, it is imperative that the Australian Government recognises that this is a critical piece of infrastructure that has been compromised in its roll out through short sighted cost cutting measures.

It is broadly accepted that the cultural and creative industries make a significant contribution to the Australian economy and practitioners are not confined to inner city enclaves, but spread through out regional areas. The Bureau of Communications and Arts Research (BCAR) has released analysis showing cultural and creative activity contributed \$111.7 billion to Australia's economy in 2016-17.

*I live relatively centrally and have speed and issues on the NBN, but it's still relatively good. I know many people and businesses who are located slightly less centrally who have major connectivity issues. The creative industries could work decentralized but increased internet capacity distributed equally for the regions is paramount. The NBN has not been high enough quality and must be invested in.*

*Australia is being left behind when it comes to our internet. I deal in files sizes that are often in excess of 20GB, it is sometimes the difference between driving for 12 hours to deliver files or letting them upload overnight. The NBN is just OK for 2020, but we need to be looking at the next 20 years now, it's going to be useless in 5 years*

*I work predominantly in video with a lot of work coming in from overseas. With 8k video becoming a standard the file sizes are too large to be delivered to clients in a timely manner most of the time. This happens a lot with 4k content as well. The NBN speeds we have are fine for 1080p but with it no longer being the standard, and that being the case for quite some time it can be very VERY difficult to be competitive in the video space at the moment.*

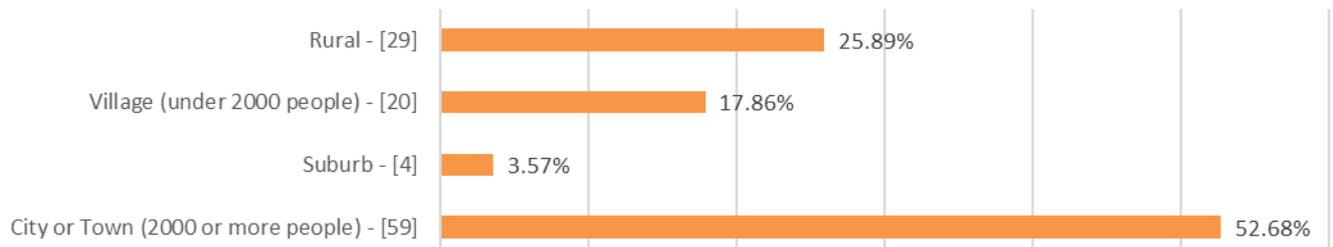
*Thank you for this initiative. A working, reliable, fast and affordable internet connection is crucial to artists working in the regions as it is our gateway to each other and the world. We collectively need to speak up about the unfortunately politically compromised state of Australian internet connections which in one word can only be described as woeful.*

*It'd be great to see recognition of the role that digital arts play in reaching international audiences*

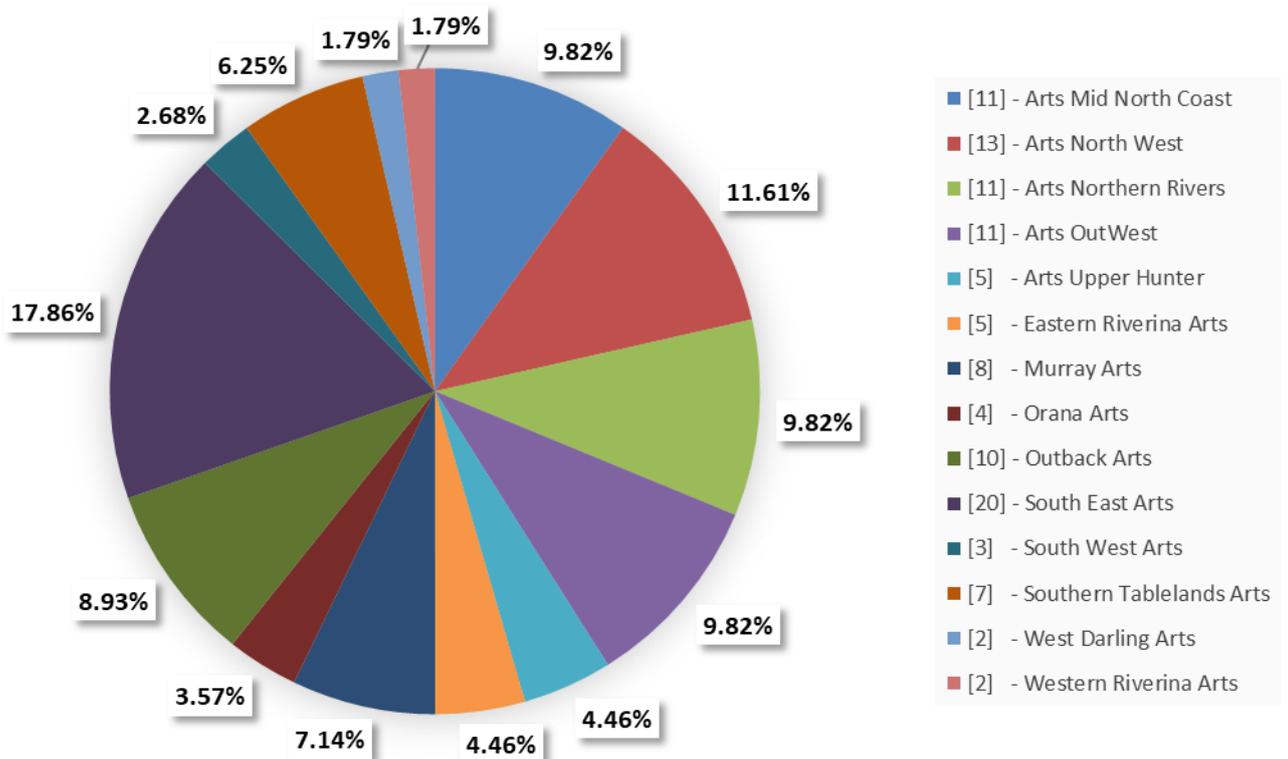
*Arts people need good internet in rural areas or you just can't keep up!*

## ADDENDUM: SURVEY RESULTS

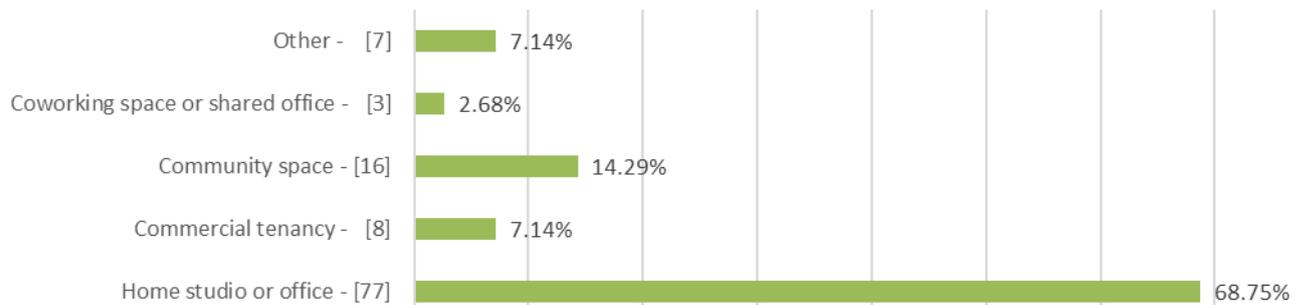
### Location of Arts Activity in Regional N.S.W [112 Respondents]



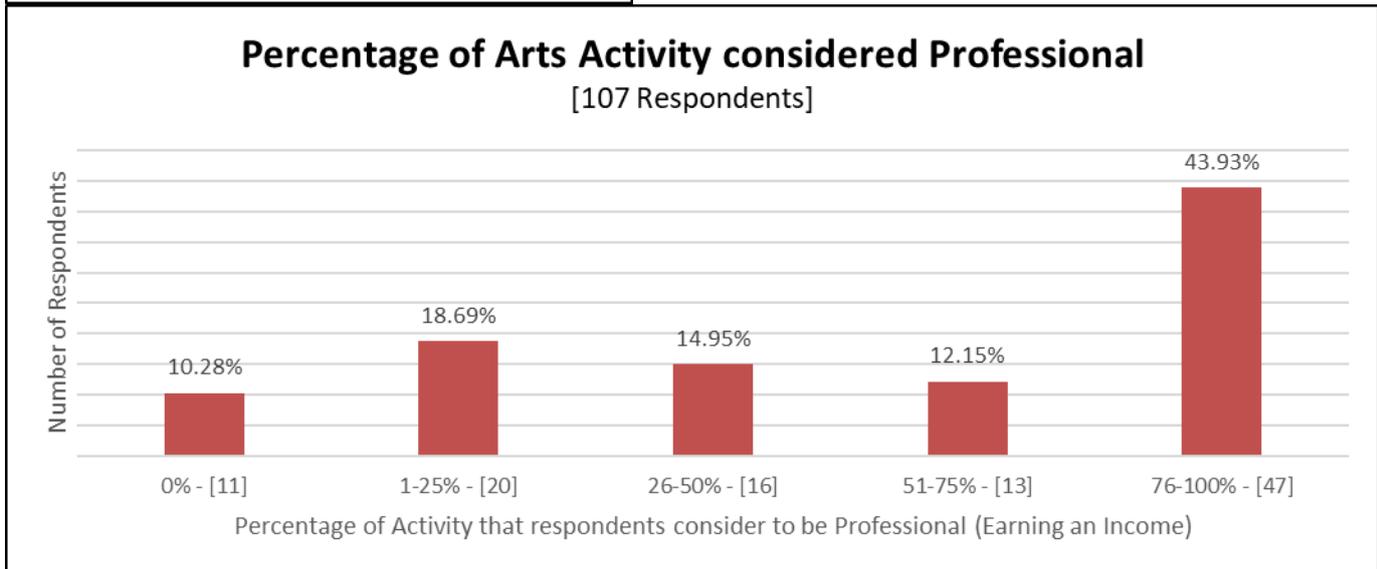
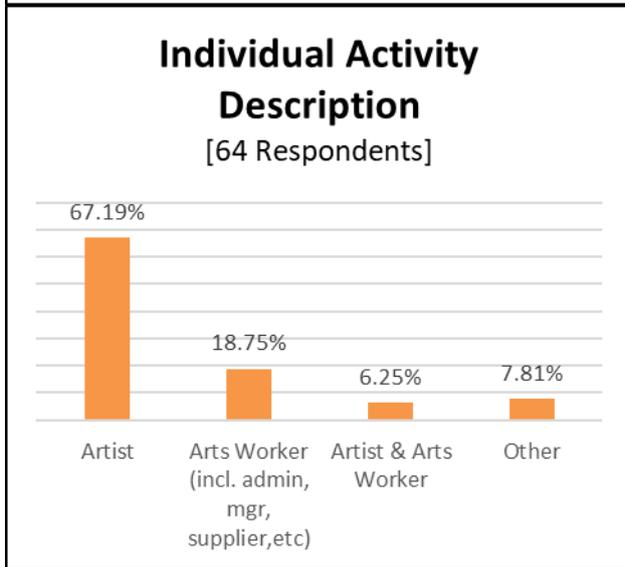
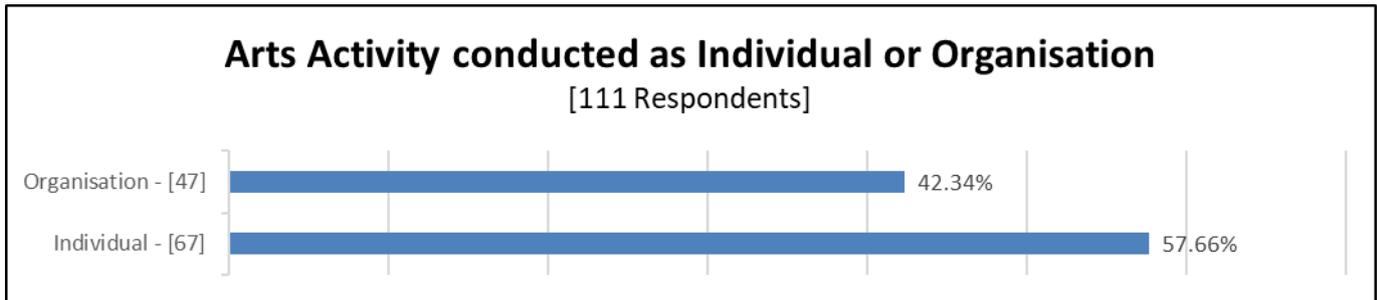
### N.S.W Regional Arts Organisation [112 Respondents]

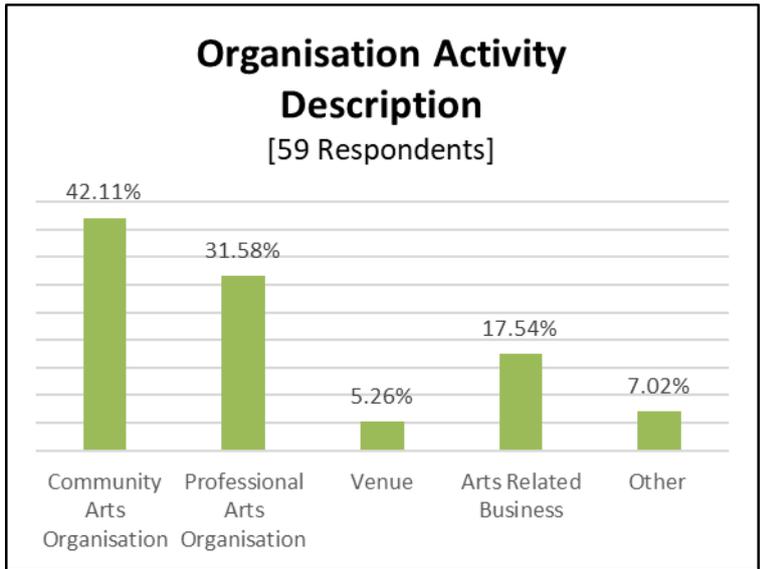


### Environment of Arts Activity [112 Respondents]

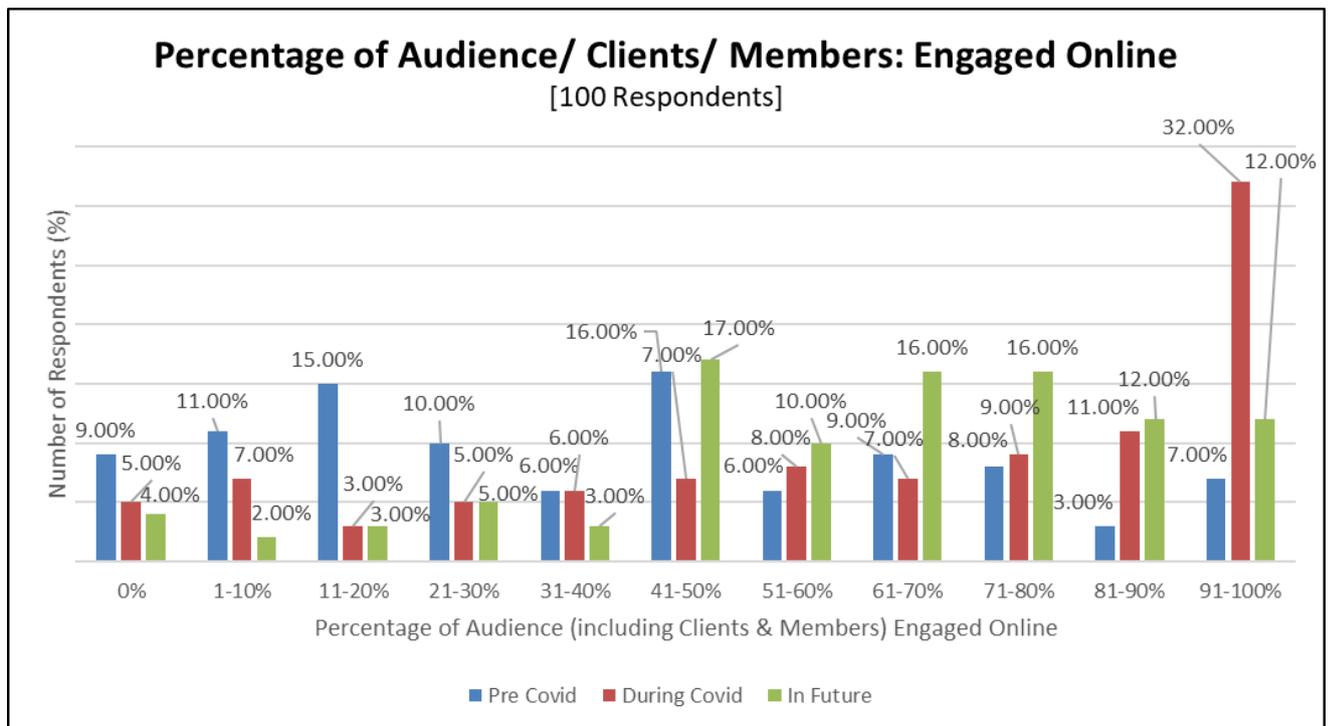
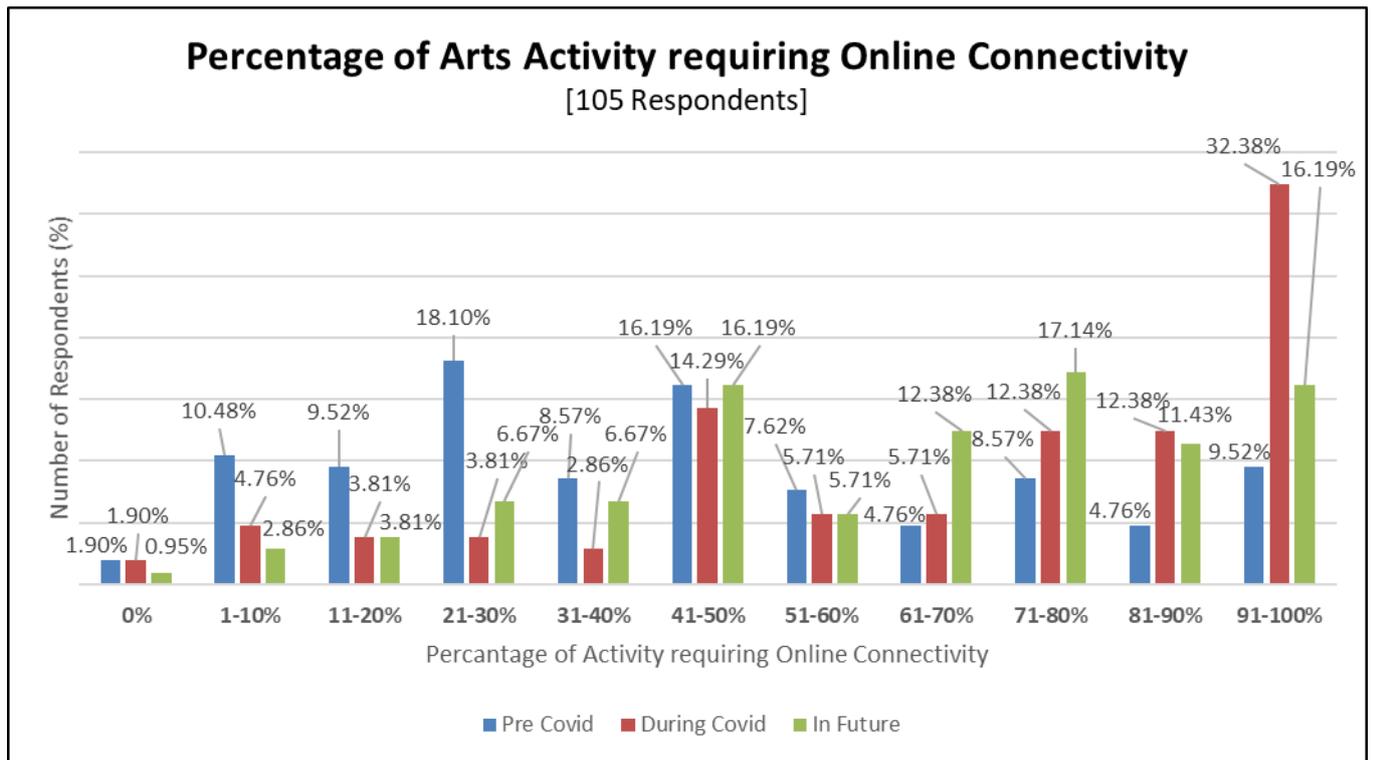


## Type of Arts Activity

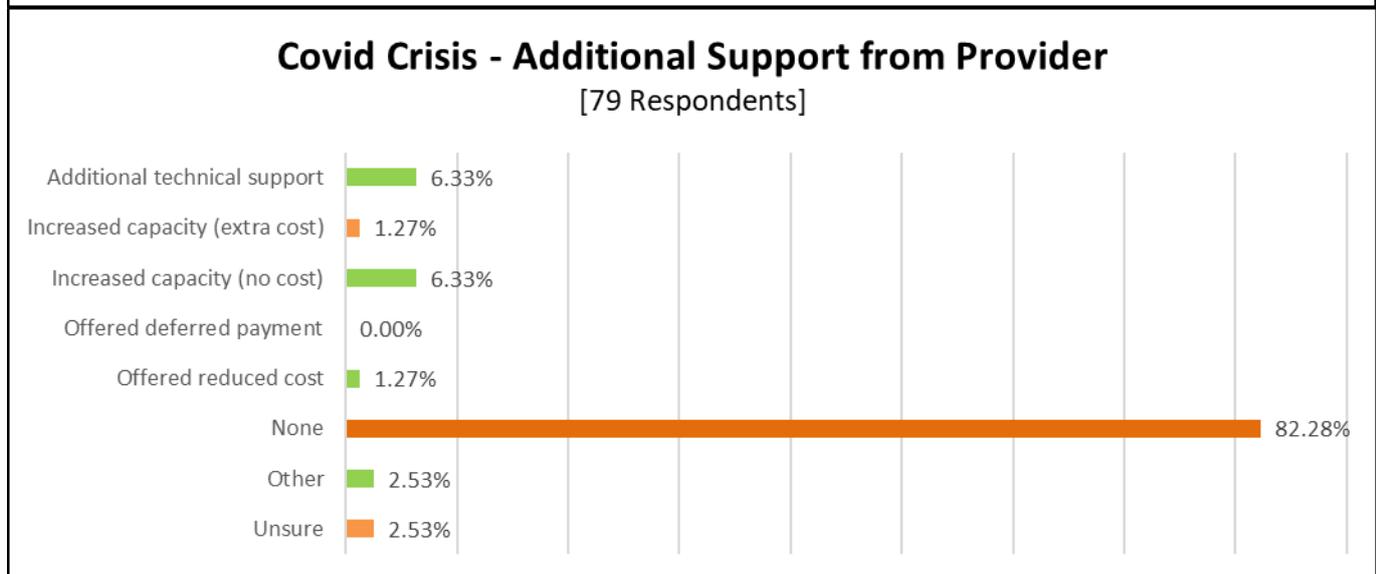
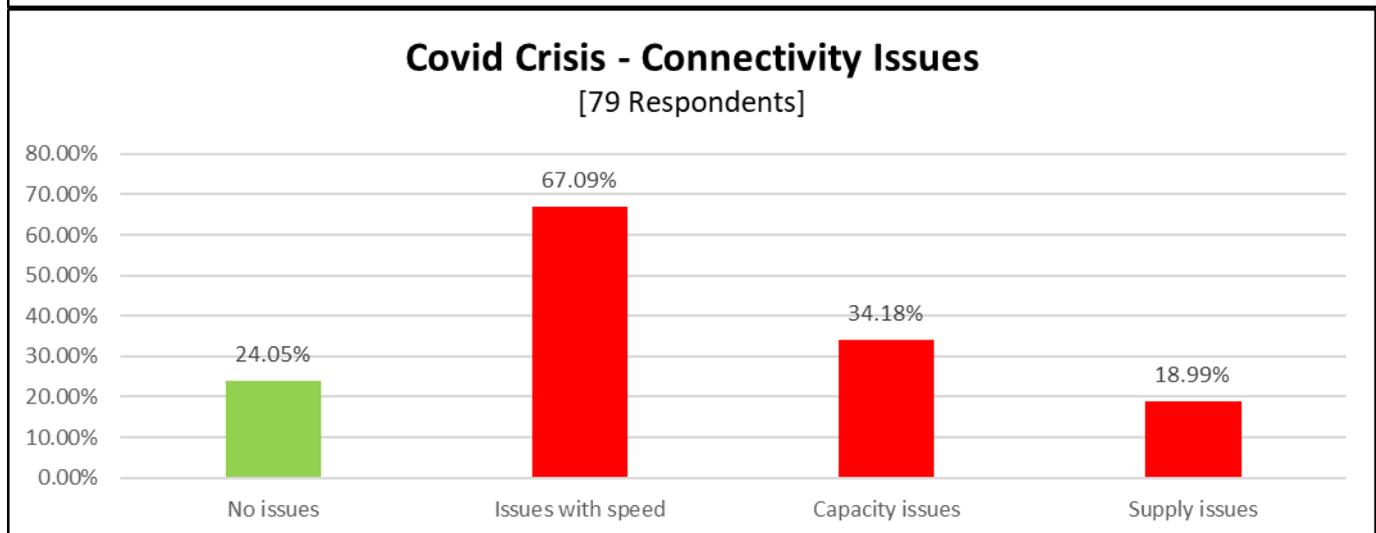
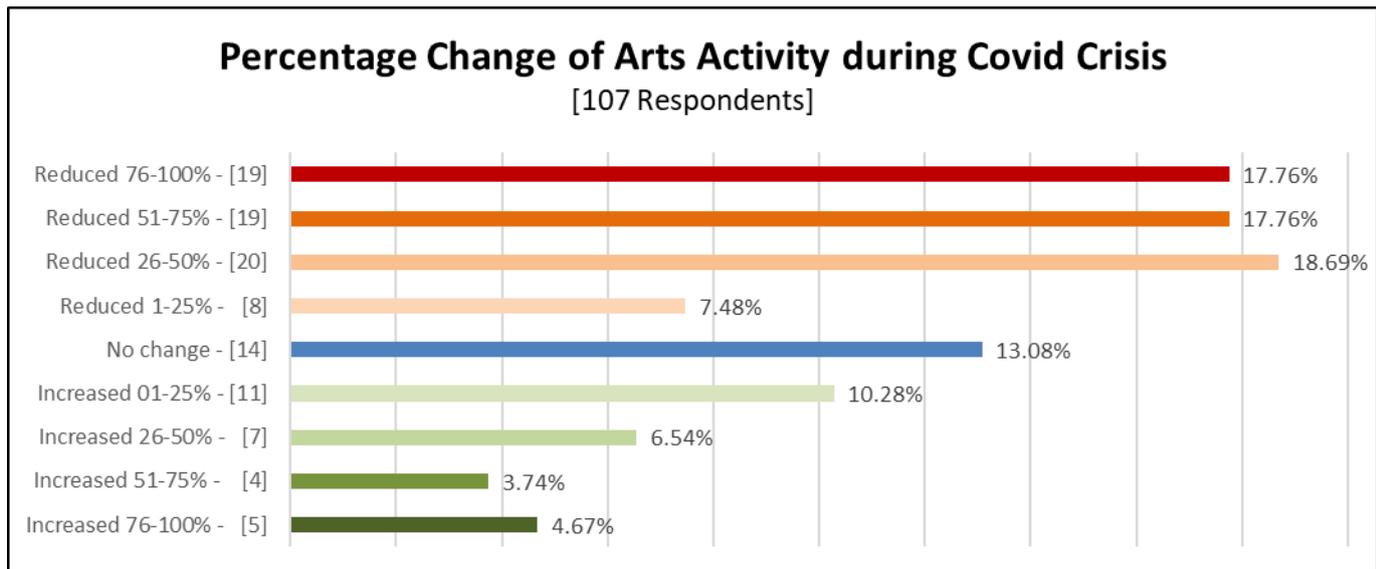




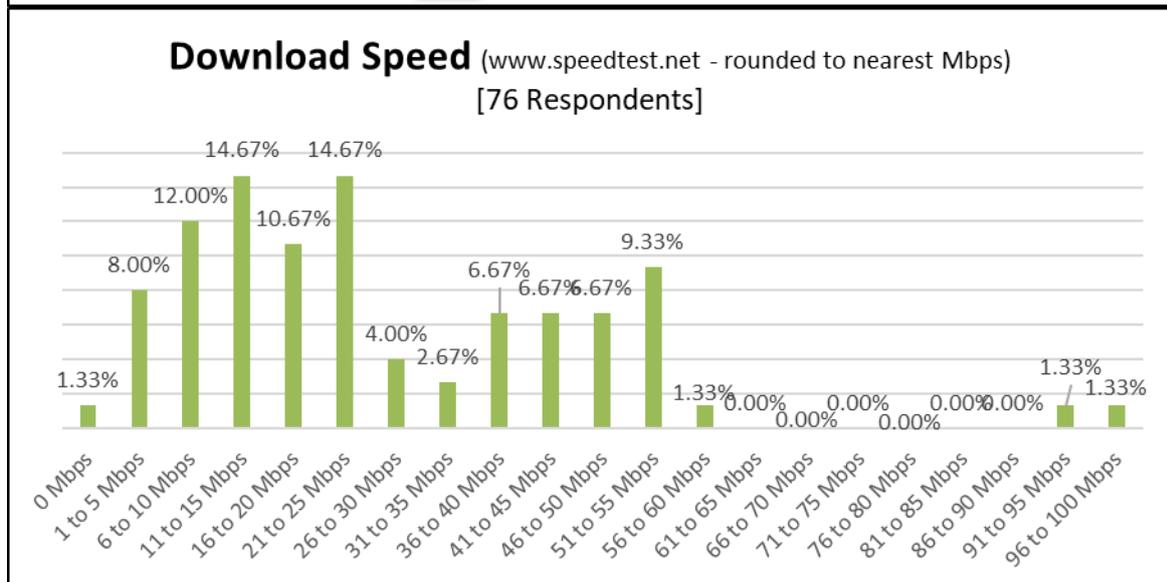
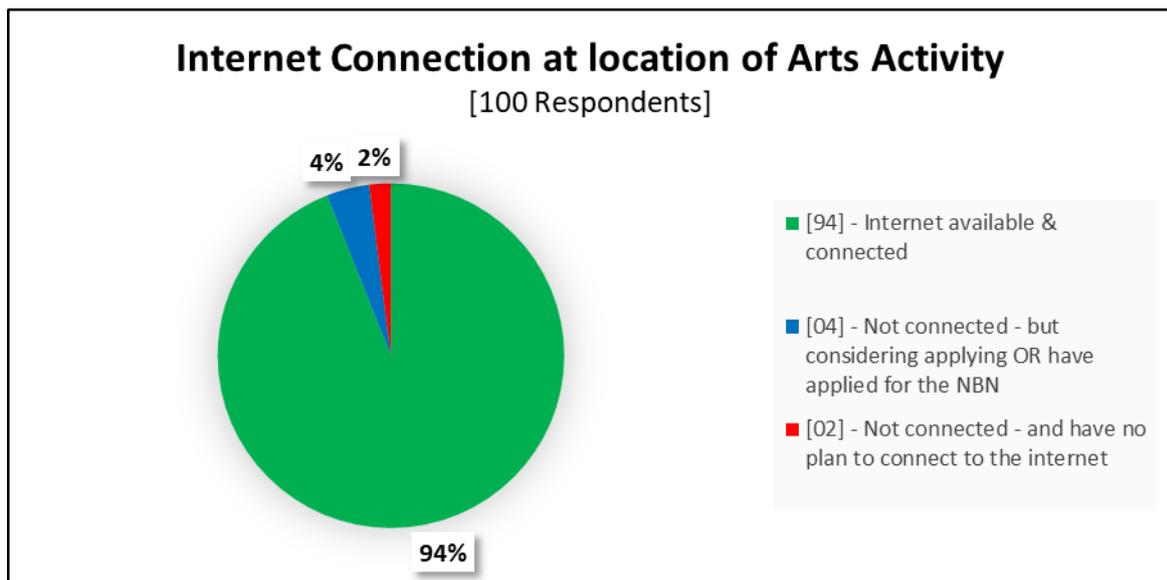
**Connectivity Requirements (pre Covid / During Covid Crisis / Projected)**



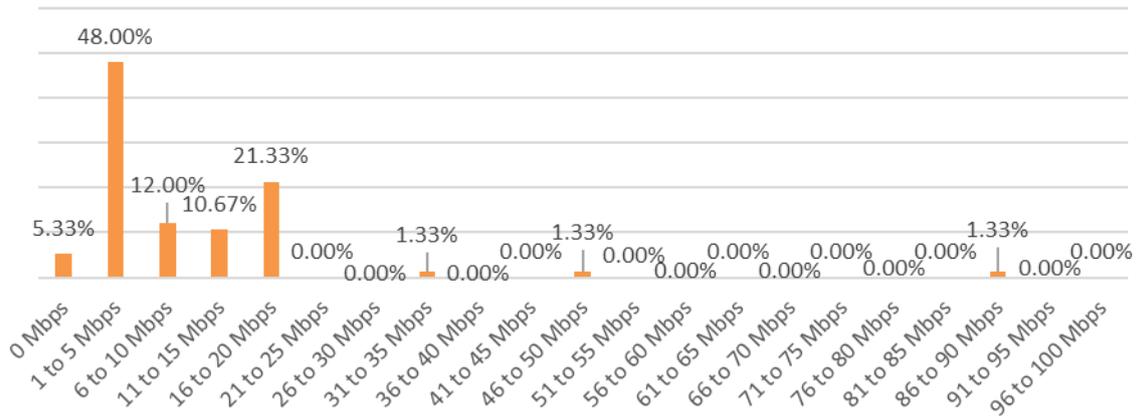
**Covid Crisis: Change in Activity / Connectivity Issues / Network Support**



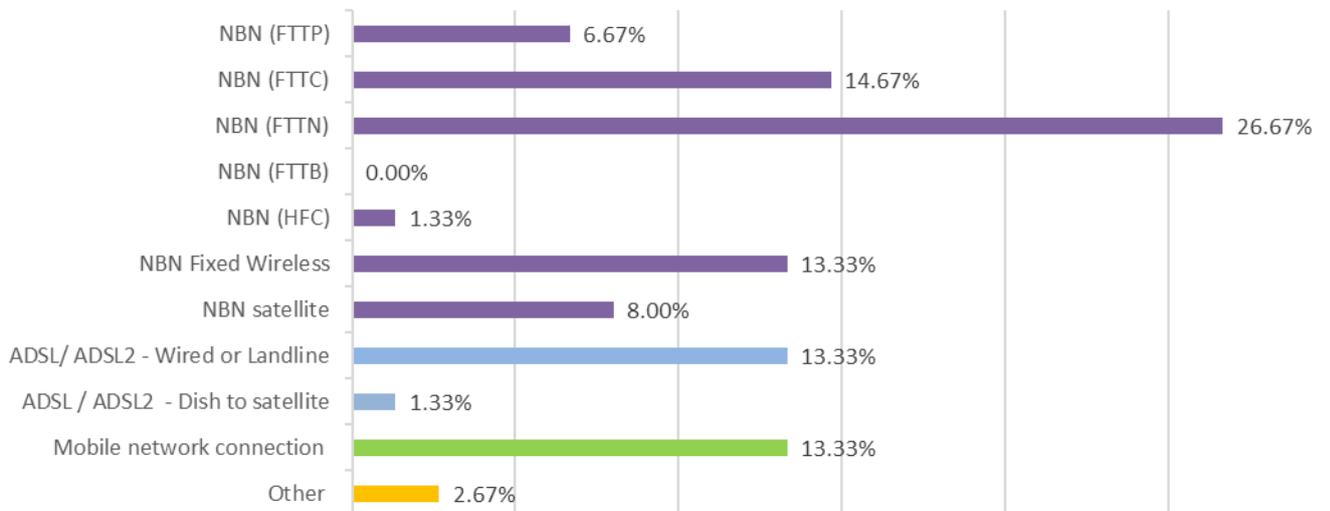
## Online Connection for Arts Activity



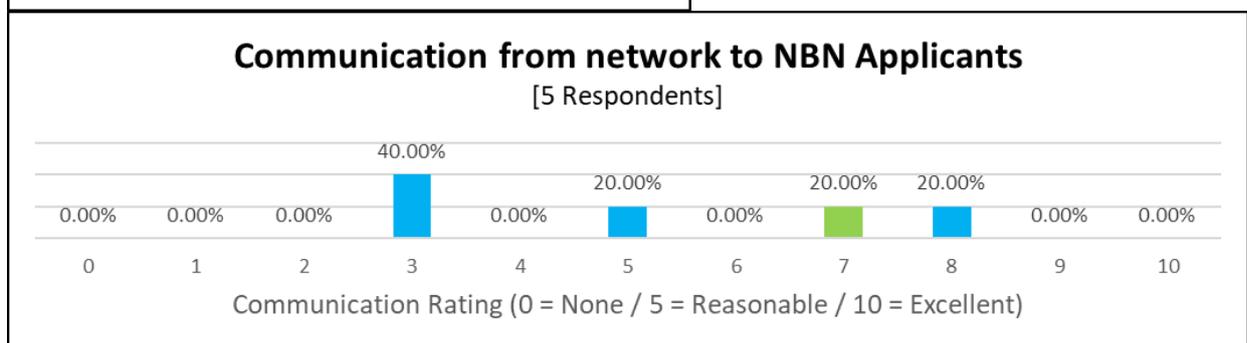
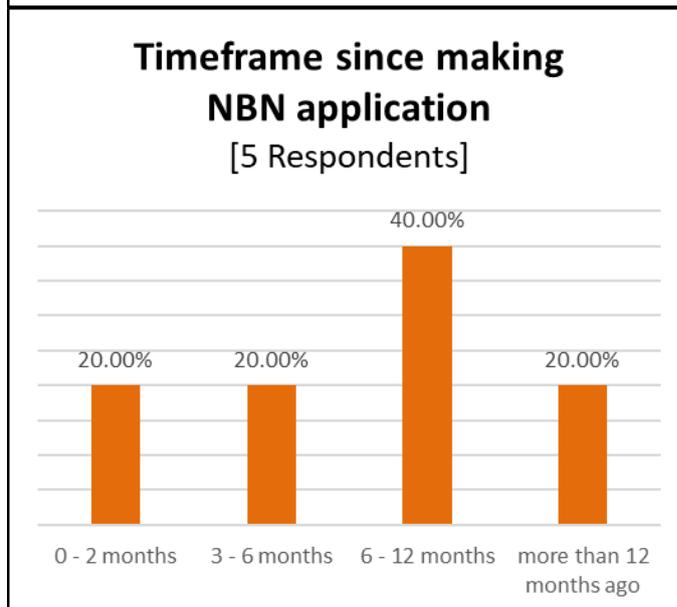
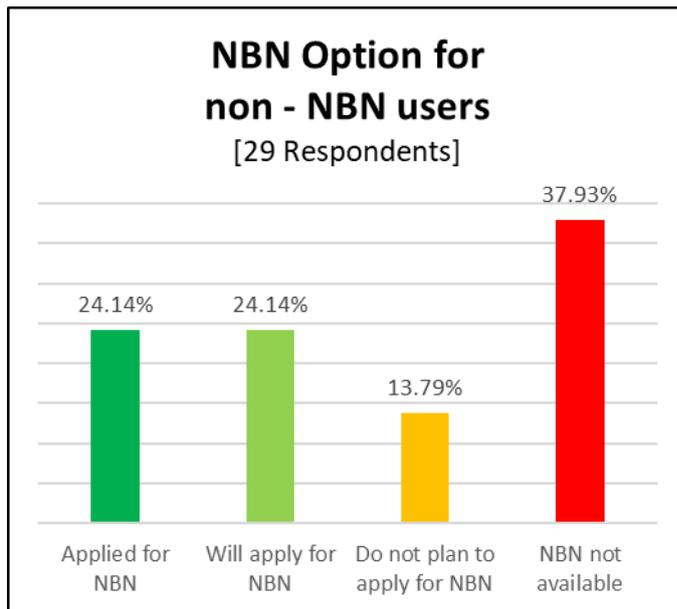
### Upload Speed (www.speedtest.net - rounded to nearest Mbps) [76 Respondents]



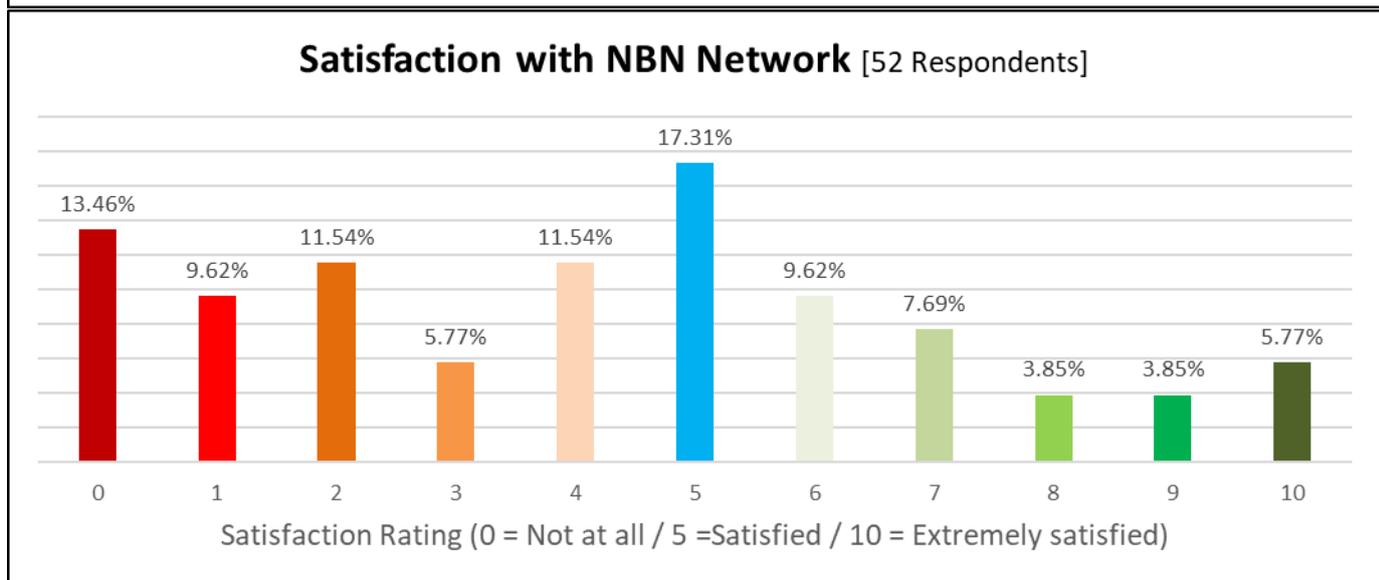
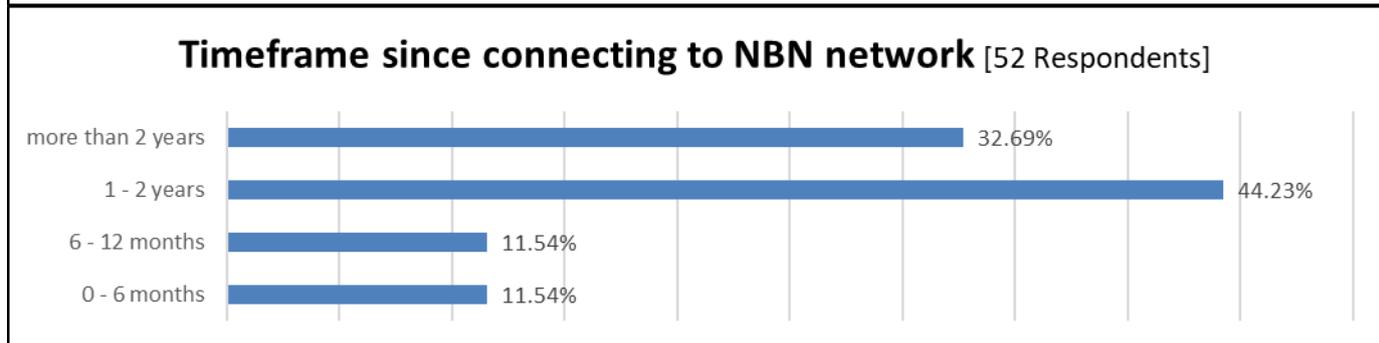
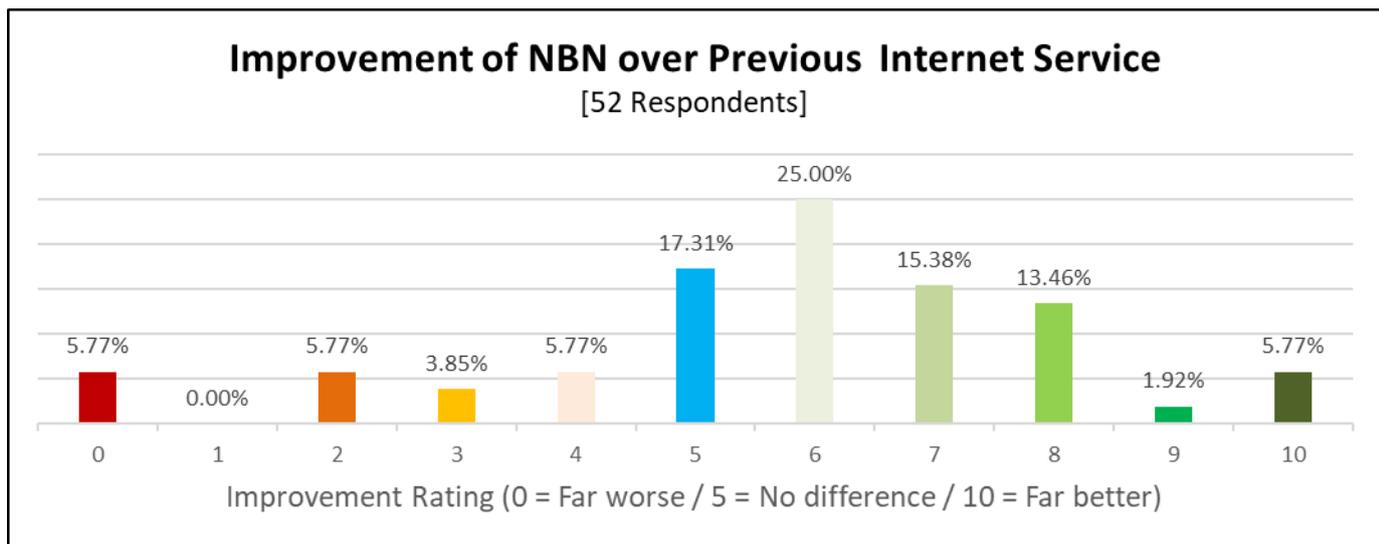
### Internet Connection Type [76 Respondents]



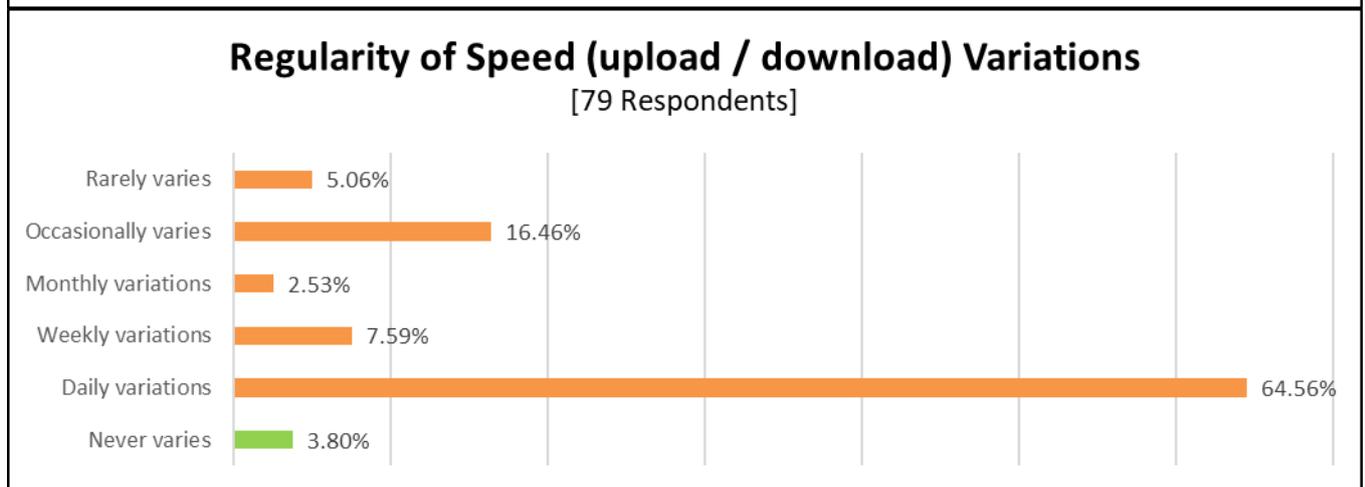
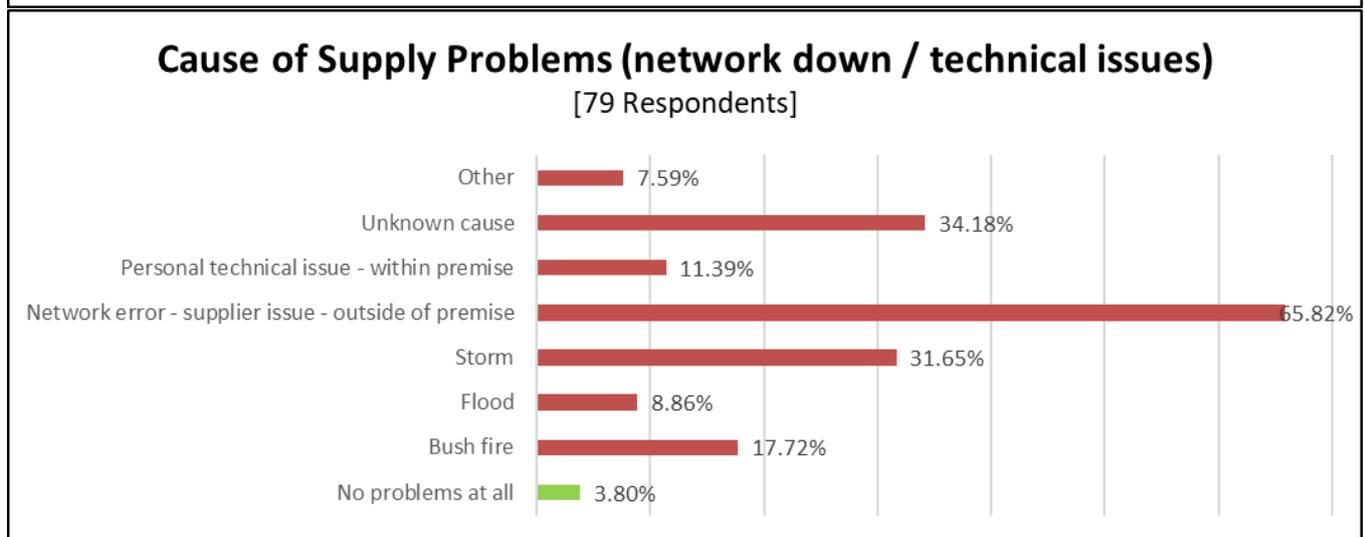
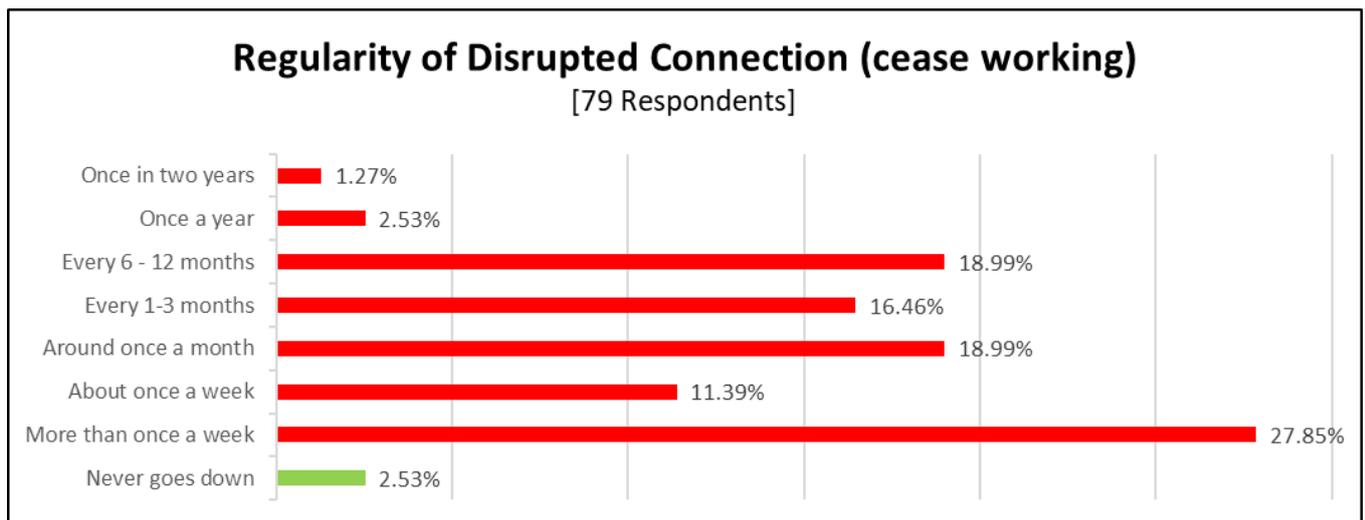
## NBN Option or Application for non-NBN user



## Experience of NBN Users

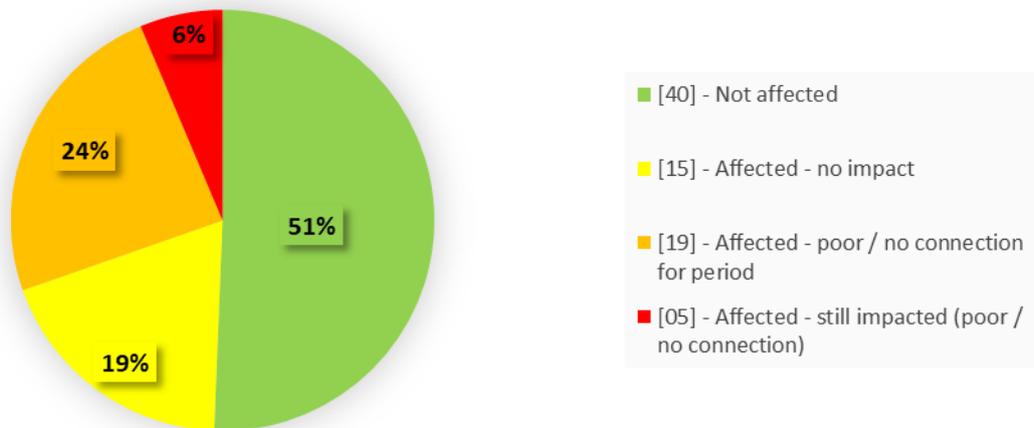


## Issues with Connection

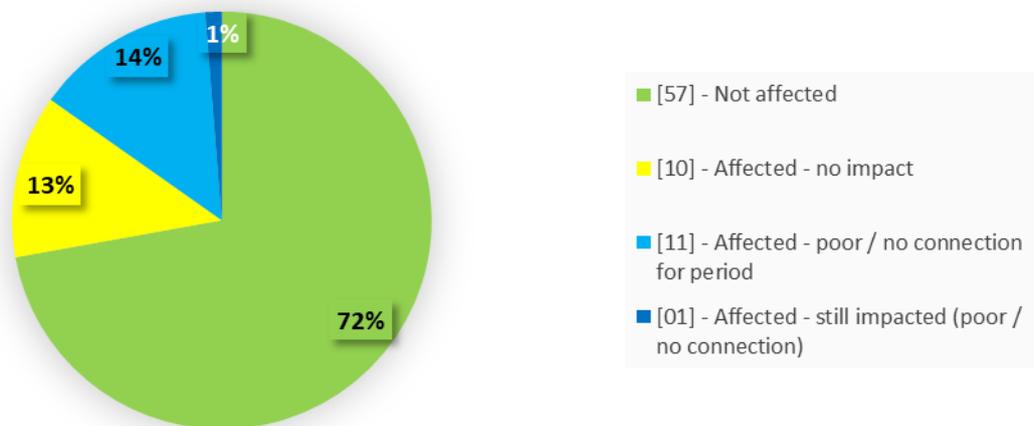


## Fire, Flood, Storms – Connectivity Impacts

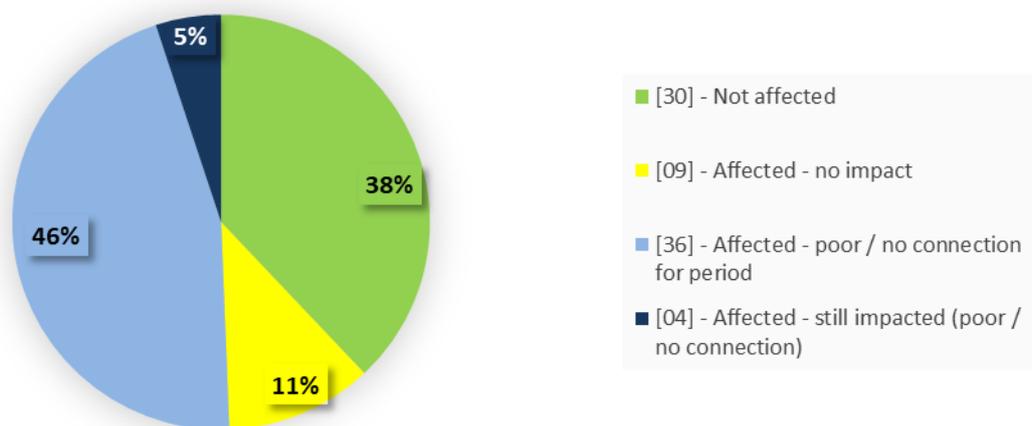
### Impact of Fire(s) on Connectivity [79 Respondents]



### Impact of Flood(s) on Connectivity [79 Respondents]



### Impact of Storm(s) on Connectivity [79 Respondents]



## Affordability, Value & Billing

