Bridging the Digital Gap

Community Engagement Report

Moira Shire Council

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1. Report Overview

1.1 Report Background

This Community Consultation report is one of three reports which will be delivered as part of the 'Bridging the Gap' project conducted by Logicalis for Moira Shire Council. The Bridging the Gap project has been undertaken to establish the current gaps in digital connectivity within Moira Shire with a view of further supporting its existing businesses to evolve within the region, as well as ensuring that connectivity is available to support future business opportunities within the shire. The second report will encompass the current service availability heatmaps from various vendors as well as any proposed future infrastructure and requirements to further support businesses in the shire. The final report will provide a gaps analysis and guidance in PowerPoint form to provide next steps and a direction for the council in further supporting its businesses through digital connectivity.

1.2 Report Purpose

The purpose of this report is to analyse the information received from both the community engagement survey and the community consultation workshops and conversations. This report will establish a baseline for how the community perceives digital connectivity within the region as well as its impact to their current business operations and potential for future expansion of their operations.

1.3 Report Structure

The report has two significant components: Community Engagement Survey Analysis and Community Consultation Workshop Analysis. Direct feedback from businesses has been de-identified to ensure business data captured is a part of the report, but not associated directly to a business.

2. Community Engagement Themes

With over 170 businesses engaged within the Moira Shire region, key themes have emerged that bring to lite a direction and focus for the outcomes of this project. Businesses engaged form a mix of small, medium, and large businesses within the region, capturing information from over 14 industries.

Key Theme 1: Mobile Connectivity – Importance and Lack of Reliability

Across the region, 3/4G, satellite and microwave technologies are utilised for many businesses to operate via a range of different carriers with over 50% of consulted businesses noting that mobile connectivity has a critical impact on their businesses ability to operate, and over 35% showing that this connectivity is critical in their business expansion decisions. It is evident from the feedback that digital connectivity is paramount to their business operations – both with regards to consistency and reliability of these services across the region.

Inconsistent 3/4G services and blackspots are evident in areas outside *and* between towns within the Shire. This poses a significant safety risk for constituents – being unable to contact emergency services etc. as well as being a lost opportunity for jobs growth for industries outside these main towns - trade, manufacturing, emergency services and agriculture services (which form almost 50% of all respondents).

Key Theme 2: Fixed Connectivity – Importance and Lack of Consumption Capability

Poor connectivity, high cost and limitations (data) of fixed line services within Moira Shire will result in businesses moving to other regions with better and more reliable fixed line services. With the expansion of new ways of working e.g., working from home, the need for efficient and cost-effective fixed line services is critical to attract customers and employees. Fixed digital services negatively impacts 90% of respondent business – efficient connectivity is no longer an option.
The two largest industries in the Shire – Agriculture and Hospitality / Tourism, rely heavily on efficient digital connectivity to manage the business, maintain staff, and increase productivity and clientele.

Key Theme 3: Support Services

Respondents expressed the need for improved customer service with their telecommunication vendors. Local knowledge is deemed as a critical aspect for customer service.

Constituents are locked in with service providers due to current availability – opportunities to investigate and integrate new providers / technologies, and improved customer representation and support will lead to improved services by providers.

3. Community Engagement Survey Analysis

3.1 Survey Overview

The community engagement survey was developed by Logicalis in consultation with Moira Shire Council – Bridging the Gap project steer co. The members of the steer co are:

- Austin Ley – Project Sponsor
- Warren Gardner
- Margot Ingoldby
- Tim Russell
- Jacki Leetham
- Martin Doddrell

There were multiple methods for delivering the survey to the community in order to achieve a high response rate, including:

- Moira Shire Council Website
- Social Media Platforms
- Marketing and Communications to local businesses
- Direct emails to various businesses

Have Your Say on Mobile Phone and Internet Connectivity

Have your say about mobile phone and internet connectivity.

The Victorian Government is fast-tracking better mobile coverage and broadband across the state through the $550 million Connecting Victoria program.

Your insights will help the Victorian Government and telecommunications providers to better understand where mobile and broadband improvements are needed across the state.

Consultation closes 20 September 2021.

Click here to begin survey   >

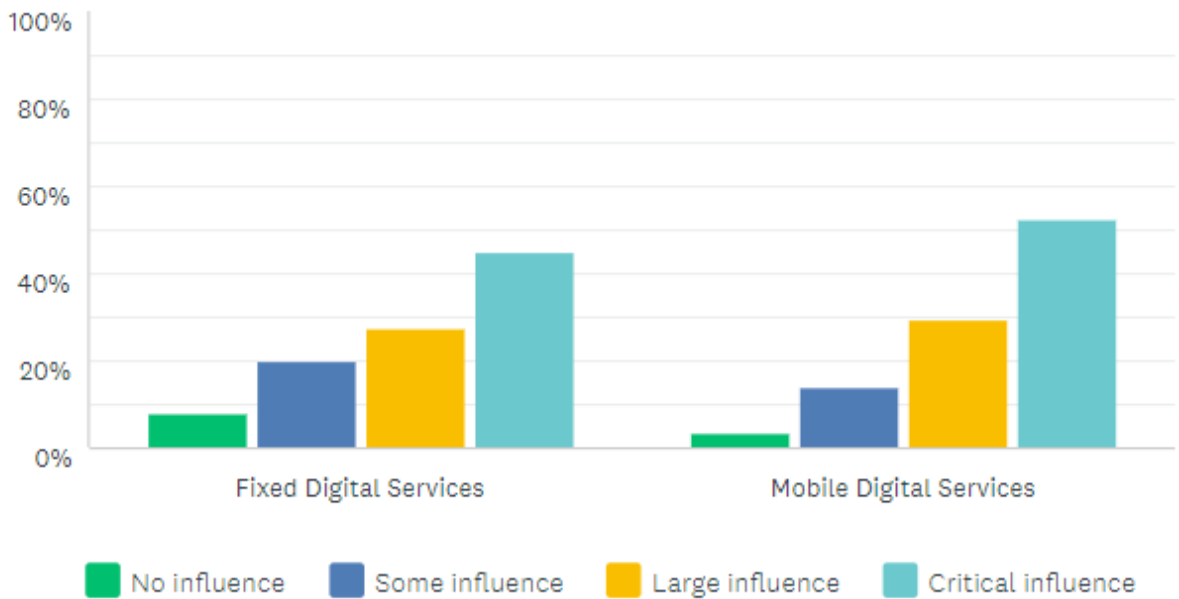Email: connectingvictoria@ecodev.vic.gov.au

The survey ran for approximately 4 weeks from 24/06/21 to 23/07/21 and received a total of 164 responses. The target for the survey was anywhere between 100-150 responses which was exceeded due to an initial 2-week period being extended to 4-weeks to allow for more comprehensive findings and results.

3.2 Survey Key Findings

- Over the 4-week period 164 responses were received
- There is a significant representation of businesses from across the Shire providing a solid foundation for the outcomes of this project. With almost 30% of businesses responding to this survey turning over $1million+ and a further 40% turning over $200,000-$1,000,000, some of the largest businesses within the shire have reached out.
- 37% of all responses received were from the agriculture, forestry, and fishing sectors, 8.5% from hospitality and accommodation, 8.5% from construction and manufacturing and an even mix through the other sectors of approximately 50% of respondents
- Locations and numbers of responses can be found on the below map:

- Over 90% of responses indicate that fixed and mobile digital services have some influence over their day-to-day operations with approximately half of responses noting a critical influence.
- Just over 80% of businesses indicate that digital connectivity has at least some influence over their expansion decisions
- Over 90% of overall responses 'feel' they are somewhat disadvantaged by the level of digital connectivity available in the region with 30% stating a critical disadvantage
- Around 50% of respondents believe the levels of digital connectivity available to them has some form of impact on their ability to recruit new staff with around 30% showing a large or critical impact
- 92% of businesses in the Shire believe that the level of digital connectivity available in the region is impacting their ability to work from home
- Over 85% of businesses believe that digital connectivity has some impact on their ability to grow their business. This shows the importance of connectivity in the region, with over 50% of respondents showing a large or critical importance for connectivity to support their growth and expansion.
- Only 5% of businesses believe they are receiving excellent support with over 75% of businesses showing limited to no support from local digital connectivity (or telecommunications) vendors

3.3 Survey Question 1 – Results and Analysis

3.3.1 Question and Results Summary

Does the level of digital service available to you as a business, influence/impact your day-to-day operations?

Answered: 165   Skipped: 0

	NO INFLUENCE	SOME INFLUENCE	LARGE INFLUENCE	CRITICAL INFLUENCE
Fixed Digital Services	7.79% 12	20.13% 31	27.27% 42	44.81% 69
Mobile Digital Services	3.70% 6	14.20% 23	29.63% 48	52.47% 85

3.3.2 Analysis

Question 1 was asked to determine the level of influence/impact digital services have on business in the shire. The split of fixed vs mobile digital services was provided to allow respondents the ability to distinguish between the current services they have available to their business.

As shown, over 90% of responses indicate that fixed and mobile digital services have some influence over their day-to-day operations with approximately half of responses noting a critical influence. This provides appropriate justification of the importance of digital service capability and connectivity within the region for all businesses. The no influence responses were predominantly from the hospitality and manufacturing

business responses which is understandable, given the type of work and the physical presence required in café's, restaurants, and bars, as well as the physical presence required in factories in the shire.

3.4 Survey Question 2 – Results and Analysis

3.4.1 Question and Results Summary

To what extent does the level of digital services currently available, support or influence your business expansion decisions?

Answered: 164   Skipped: 1
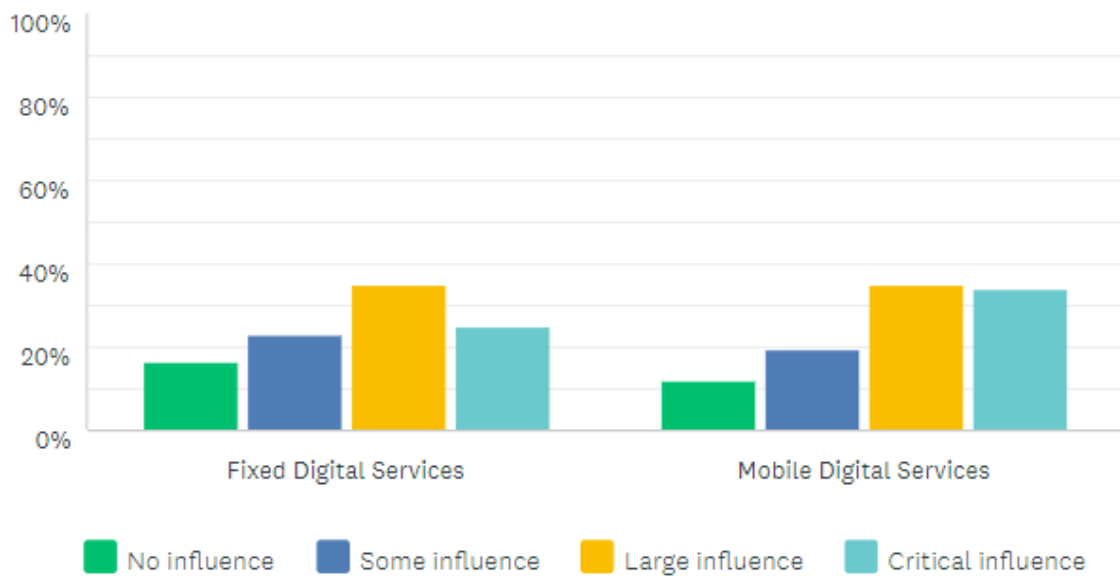
|	NO INFLUENCE	SOME INFLUENCE	LARGE INFLUENCE	CRITICAL INFLUENCE
Fixed Digital Services	16.56% 25	23.18% 35	35.10% 53	25.17% 38
Mobile Digital Services	11.80% 19	19.25% 31	34.78% 56	34.16% 55

3.4.2 Analysis

Question 2 was asked to establish an understanding of which businesses were reliant on digital services to expand their business as well as its influence and impact on their expansion. As shown over 80% of businesses indicate that digital connectivity has at least some influence over their expansion decisions. Like the responses to question 1, the industry who does not believe fixed or mobile digital services will impact their business expansion decisions are mainly hospitality businesses, who outside of an EFT machine will seldom require a significant digital presence to expand.

3.5 Survey Question 3 – Results and Analysis

3.5.1 Question and Results Summary

To what extent do you think your area in Moira Shire is disadvantaged due to the availability of digital services?

Answered: 164   Skipped: 1
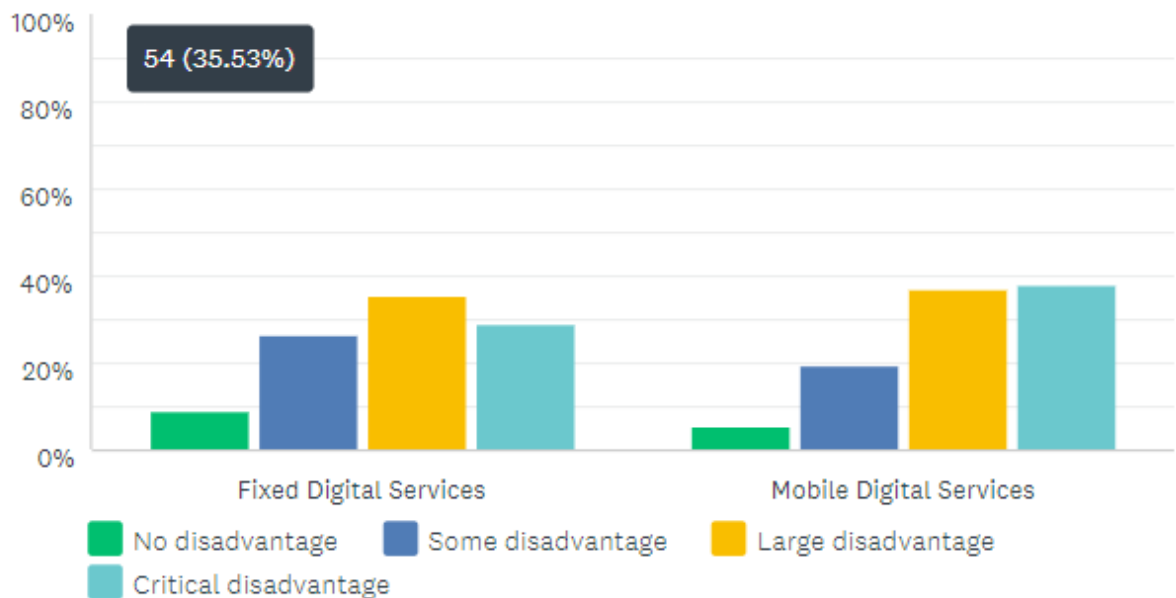
|	NO DISADVANTAGE	SOME DISADVANTAGE	LARGE DISADVANTAGE	CRITICAL DISADVANTAGE
Fixed Digital Services	9.21% 14	26.32% 40	35.53% 54	28.95% 44
Mobile Digital Services	5.52% 9	19.63% 32	36.81% 60	38.04% 62

3.5.2 Analysis

Question 3 has been asked to understand how the levels of digital connectivity are perceived within the region and to assess the current 'feel' of businesses with regards to the capabilities present through digital connectivity currently. Over 90% of overall responses to Q3 indicate that businesses in the region 'feel' they are somewhat disadvantaged by the level of digital connectivity available in the region with 30% critically disadvantaged. The results further indicate a similarity with the overall weight of question

3.6 Survey Question 4 – Results and Analysis

3.6.1 Question and Results Summary

To what extent does the availability of digital services impact the ability for you to recruit staff?

Answered: 164   Skipped: 1
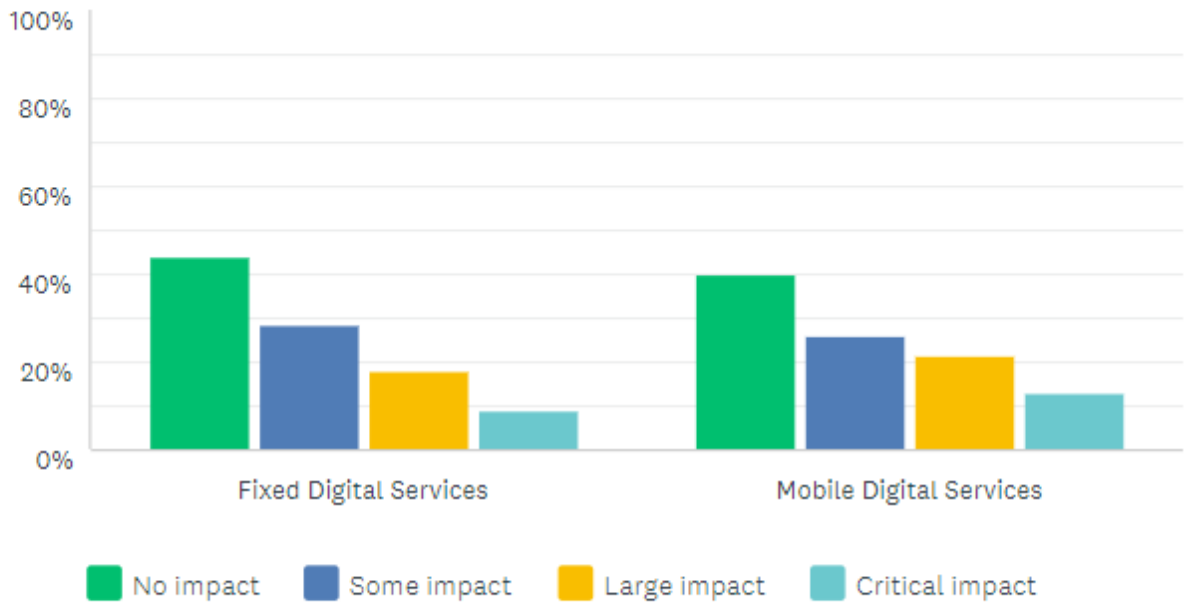
|	NO IMPACT	SOME IMPACT	LARGE IMPACT	CRITICAL IMPACT	TOTAL
Fixed Digital Services	44.16% 68	28.57% 44	18.18% 28	9.09% 14	154
Mobile Digital Services	39.88% 65	25.77% 42	21.47% 35	12.88% 21	163

3.6.2 Analysis

Along with question 2, question 4 was asked to understand how business growth as well as staff turnover and staff recruitment is impacted by digital connectivity in the region. Approximately 50% of respondents believe the levels of digital connectivity available to them has some form of impact on their ability to recruit new staff with around 30% showing a large or critical impact. The mix of digital vs mobile services is not significant, however more responses have been included in almost all questions thus far for mobile digital services, implying more of a focus on mobile digital services than fixed digital services.

3.7 Survey Question 5 – Results and Analysis

3.7.1 Question and Results Summary

To what extent does connectivity within your area affect your employees' ability to work from home if required?

Answered: 162   Skipped: 3
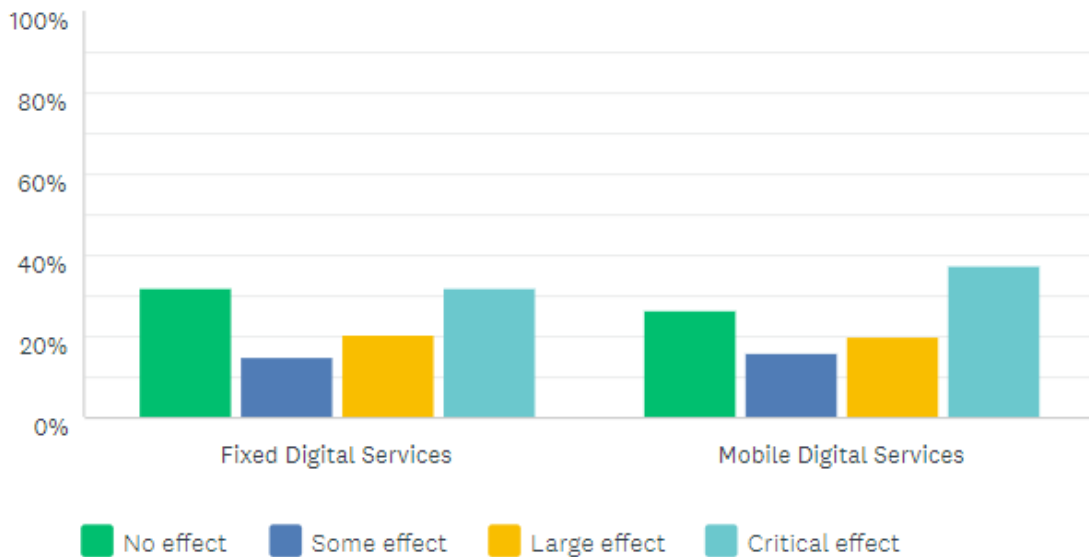
|	NO EFFECT	SOME EFFECT	LARGE EFFECT	CRITICAL EFFECT	TOTAL	WEIGHTED AVERAGE
Fixed Digital Services	32.24% 49	15.13% 23	20.39% 31	32.24% 49	152	2.53
Mobile Digital Services	26.54% 43	16.05% 26	19.75% 32	37.65% 61	162	2.69

3.7.2 Analysis

Question 5 was asked to establish an understand of the impacts of digital connectivity on the working from home capabilities in the shire. Unsurprisingly almost 75% of businesses believe there is at least some impact with their ability to work from home based on the results. However, upon further investigation, most of the businesses who responded with 'no effect' were mostly businesses who did not have the capability to work from home bringing the total number of effected businesses to 92% - i.e. of the businesses who can work from home, 92% believe that the level of digital connectivity is impacting their ability to do so with 8% who don't believe that digital connectivity is impacting their ability to work from home.

3.8 Survey Question 6 – Results and Analysis

3.8.1 Question and Results Summary

Does digital connectivity play a role in your ability to grow your business?

Answered: 163   Skipped: 2
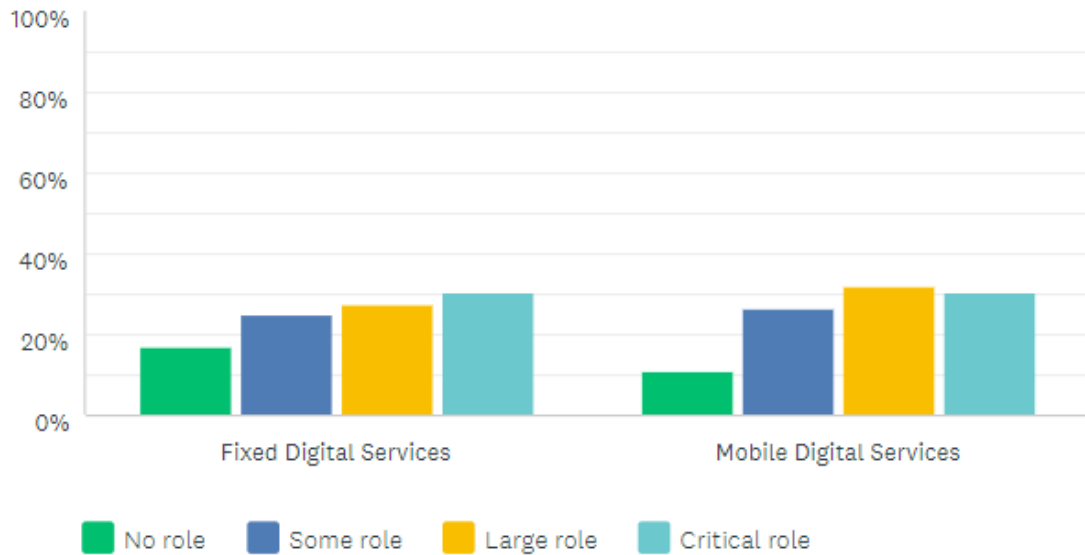
|	NO ROLE	SOME ROLE	LARGE ROLE	CRITICAL ROLE	TOTAL	WEIGHTED AVERAGE
Fixed Digital Services	16.99% 26	24.84% 38	27.45% 42	30.72% 47	153	3.24
Mobile Digital Services	11.04% 18	26.38% 43	31.90% 52	30.67% 50	163	3.40

3.8.2 Analysis

As with questions 2 & 4, question 6 has been asked to understand the importance of digital connectivity in the region's impact to their business growth decisions. Results show that over 85% of businesses believe that digital connectivity has some impact on their ability to grow their business. This shows the importance of connectivity in the region, with over 50% of respondents showing a large or critical importance for connectivity to support their growth and expansion. The results here are unsurprising given the importance of digital connectivity in society with businesses.

3.9 Survey Question 7 – Results and Analysis

3.9.1 Question and Results Summary

How would you rate the level of support for your business, offered by your digital service provider?

Answered: 164   Skipped: 1
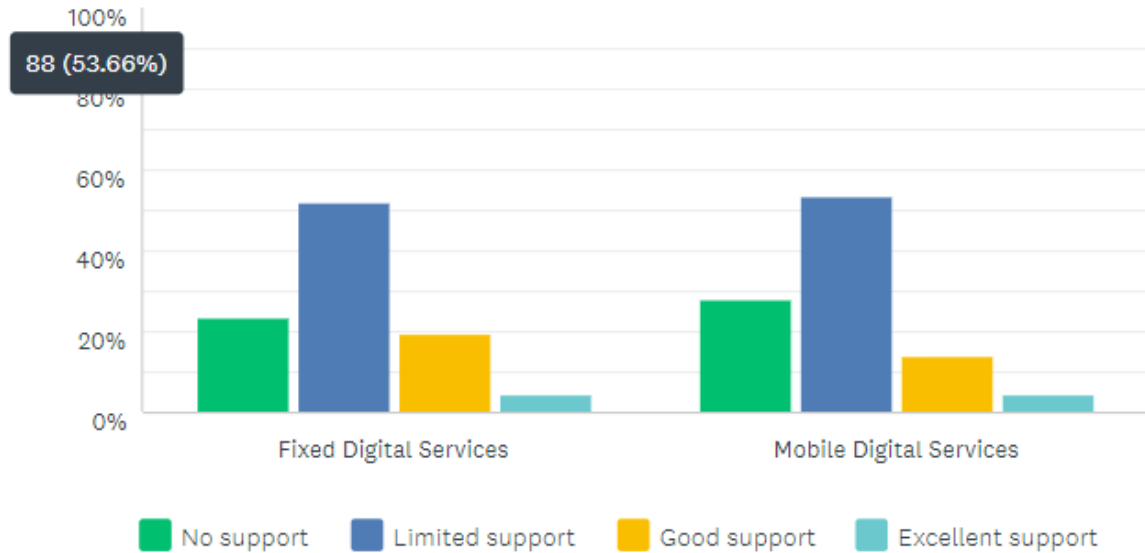
	NO SUPPORT	LIMITED SUPPORT	GOOD SUPPORT	EXCELLENT SUPPORT	TOTAL	WEIGHTED AVERAGE
Fixed Digital Services	23.68% 36	51.97% 79	19.74% 30	4.61% 7	152	2.05
Mobile Digital Services	28.05% 46	53.66% 88	14.02% 23	4.27% 7	164	1.95

3.9.2 Analysis

Question 7 has been asked to determine the support businesses are receiving from their local digital service providers. As shown, only 5% of businesses believe they are receiving excellent support with over 75% of businesses showing limited to no support from local vendors. This result is not surprising given that most of the time, feedback is provided to survey's when there is an issue or when people are experiencing hardship, so no doubt the results to this question are somewhat skewed. However, with only 20-25% of businesses who are happy with the support they are receiving, a significant investment into marketing and communications from vendors is required to uplift their support for local businesses.

3.10 Survey Question 8 – Results and Analysis

## 3.10.1 Question and Results Summary

Could you please provide us with the following information about your business?

No. of Employees					
	5 OR LESS	**6-20**	**21-50**	**50+**	**TOTAL**
Select one from each dropdown menu	77.55% 114	14.29% 21	4.76% 7	3.40% 5	147

Annual Turnover Range					
	LESS THAN $50,000	**$50,001 TO $200,000**	**$200,001 TO $1,000,000**	**$1,000,001 TO $5,000,000**	**ABOVE $5,000,000**	**TOTAL**
Select one from each dropdown menu	11.58% 11	18.95% 18	41.05% 39	18.95% 18	9.47% 9	95

Postcode																
	3635	3636	3637	3638	3639	3640	3641	3644	3646	3649	3675	3678	3727	3728	3730	TOTAL
Select one from each dropdown menu	2.52% 4	10.69% 17	5.66% 9	10.06% 16	7.55% 12	1.26% 2	7.55% 12	25.79% 41	0.00% 0	4.40% 7	4.40% 7	0.63% 1	3.14% 5	1.26% 2	15.09% 24	159

3.10.2 Analysis

Commercial-in-Confidence @ Logicalis Australia
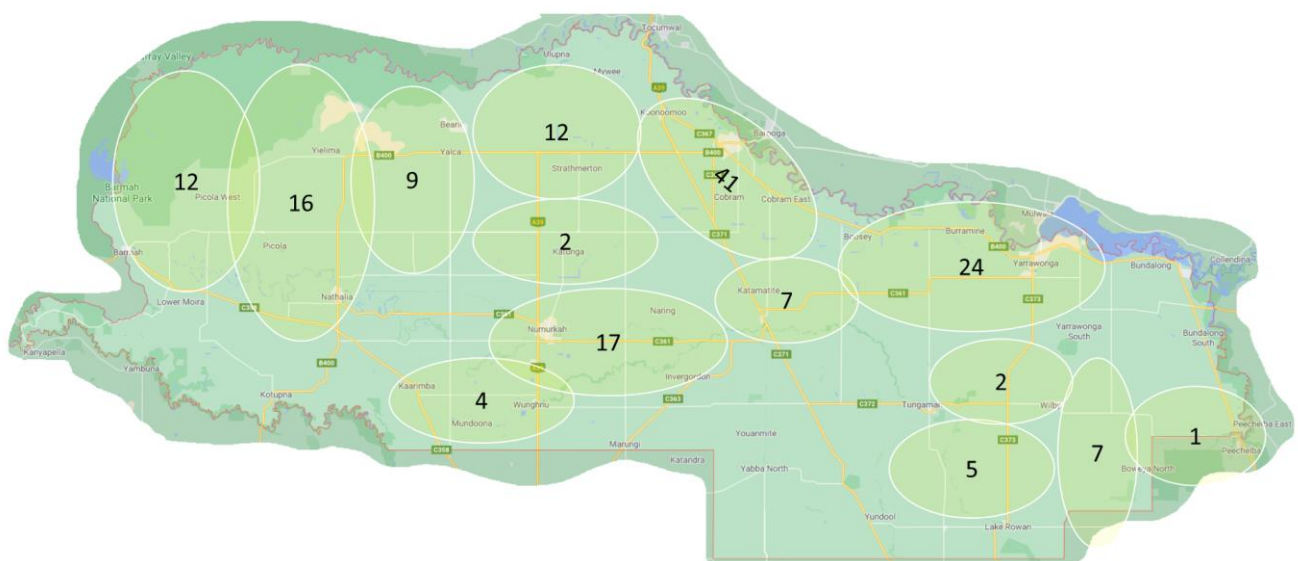
Above has been developed to provide a representation of survey results from Moira Shire – how many businesses responded in each postcode.

As shown, there is a significant representation of businesses from across the Shire providing a solid foundation for the outcomes of this project. With almost 30% of businesses responding to this survey turning over $1million+ and a further 40% turning over $200,000-$1,000,000, some of the largest businesses within the shire have reached out. Interestingly, over 75% of businesses who have 5 or less staff, however there is an excellent disparity in business sizes to provide appropriate feedback.

NUMBER OF BUSINESSES IN EACH INDUSTRY WHO RESPONDED TO SURVEY

Industry	Number
Agriculture, Forestry & Fishing	59
Manufacturing	6
Construction	8
Wholesale Trade	3
Retail Trade	7
Accommodation & Food Services	14
Transport, Postal & Warehousing	6
Info Media & Telecommunications	1
Financial & Insurance Services	1
Rental, Hiring & Real Estate Services	1
Professional, Scientific & Technical...	3
Administrative & Support Services	1
Public Administration & Safety	1
Education & Training	5
Health Care & Social Assistance	2
Arts & Recreation Services	2
Other Services	11

3.11 Survey Question 9 – Results and Analysis

3.11.1 Question and Results Summary

If you would like to provide us with more information about how digital services support/impact your business, please comment in the box below. If you would like us to contact, you please include your name and phone number / email address.

3.11.2 Analysis

Of the 63 responses with direct feedback, the key themes have been pulled from the survey monkey report and are summarised based on the bellow commentary.

The overwhelming feedback in this section is the lack of 3G and 4G connectivity which makes it difficult for business staff to operate when they are mobile. The agriculture sector responses clearly indicate that this is the only way they can provide connectivity to workers on large farms, however the connectivity is so poor they are having to look at other alternatives.

Waiia, Koonoomoo, Yarroweyah, Strathmerton and parts of Cobram are the key focus areas for the feedback received with multiple reports of poor 3G and 4G connectivity including mention of multiple blackspots in these areas.

Multiple businesses have reported cases of NBN being extremely close to their business location but the requirement for connection is that they fit the bill to be connected. Businesses also provided multiple complaints relating to the lack of dependability and consistency in service of Microwave/Satellite technologies for internet services as well as the lack of speed/bandwidth available through these wireless technologies.

Verbatim commentary relevant to connectivity in the community:

"We struggle as a business to maintain a mobile connection on about 60% of our farm this creates an occupational health and safety issue as well as a business disadvantage. The mobile phone service often drops out mid phone call or you are unable to connect at all."

"We've gone to sky muster for internet. It's expensive but far better than other services which are slow, drop out and the companies don't seem to care. Landlines are becoming a thing of the past on farms for several reasons including costs of having both mobile and landlines. Service with mobiles here in Boweya has patchy reception. It has improved marginally around 3675 post code and we no longer have to go down the end of the road to use a mobile. Now it's about where you stand."

"Our NBN is terrible. We have been without internet for up to 6 weeks & we have an internet-based booking system. Fixed NBN is within 100metres of the park, & we would have to pay to get connected even though the NBN work was being done last year!!!"

"Very patchy mobile service just out of Cobram making it difficult to work from home or afterhours or during lockdown. Too many black spots."

"Mobile phone reception in the Waiia area is almost non-existent and is a very real problem if an emergency arises."

"The mobile service is terrible we can't take a call in the house and need to go outside for any phone calls"

"Koonoomoo mobile coverage is so bad, in fact it barely exists. Koonoomoo mobile coverage needs attention ASAP."

"Very limited reception once outside of town in most directions, which leaves us just about buggered for internet, especially considering we need to use our phone for a connection via hotspot out of town limits my business and ability to call staff or potential new employees greatly"

"I need to use satellite to access internet. It is relatively slow and has severe download restrictions. I have been told I will never be able to access proper NBN. I am considering moving my business to Shepparton. Mobile phone/digital service is also poor. I have just been out on the veranda so I can Make a phone call."

"Unfortunately, mobile service in Picola is appalling. This makes business operations very difficult when you rely on a mobile phone service for your mobile mechanic service in the Picola district. We repair farmers machinery, often unable to contact one another for parts or to ring suppliers from the job site. This is so frustrating and annoying."

Cobram related: Lack of phone connectivity *"impacts the technology we can deploy and adding further costs instead of reducing costs. Additionally, the major safety risks of no mobile phone reception for over 1500+ staff onsite at harvest or in the offseason"*

"Satellite internet is the only option, and this has limitations for data and storage."

"We currently use just 3/4/5G mobile for all internet and phone calls. We always experience dropped calls, missed calls and intermittent use of internet through no service availability or very slow connectivity. Other forms of internet provision seem to be unsuitable or too expensive for us to use on the farm."

"Poor connectivity impacts the time taken to complete routine tasks. On road/on farm contact is minimal impacting safety and efficiency. Adding new services is not easy as the connectivity and internet speed limits expansion."

"My husband is operating our own electrical business which we are reluctant to expand from our current workshop at this time. A big contributing factor is lack of connectivity and consistent communication from our current workshop. I am a health care professional with Goulburn Valley Health strengthening connections between our local health services, metropolitan Melbourne, and other regional organisations. I have the opportunity to work 60% offsite from our own home where I have an office set up. However, I have not been successful in doing so due to atrocious speeds, persistent dropouts in both internet and mobile service."

"We have to pay ridiculous prices for satellite NBN which is slow and most of the time does not support video conferencing."

"We are down Labuan Rd so we are in the Yarroweyah black spot area with mobile coverage. It is ludicrous that this spot is so bad with coverage."

"In Yarroweyah there is very little connectivity, this is a huge disadvantage for a staff member as I cannot work from home. Strathmerton is generally good, however when the internet is down it prevents us from taking payments and therefor stops business."

4. Community Consultation

4.1 Key Themes and Findings

- All businesses have had staff complaining about 3G and 4G connectivity when travelling and working throughout the region
- Outside of fixed NBN connectivity (FTTB, FTTC and HFC), satellite and microwave connections are used (with remote connectivity) and all connections are inconsistent and 'patchy'
- Two Schools and a Hospital were consulted, and their fixed line connectivity was quite good. They were all consuming business grade fibre to the premise connections
- Working from home was a concern for all businesses depending on their staff locality. If staff are near town, they typical have good connectivity, however the remote staff are of significant concern. In most cases they are on satellite/microwave which is inconsistent in service and significantly impacting their ability to work remotely
- Within manufacturing and agriculture, mobile connectivity is of significant concern, mostly from a safety perspective from business owners. When staff are working in a factory or on a crop and there are significant blackspots, it is a high risk if an injury occurs, and they are unable to contact emergency services or their office for support
- Within agriculture and farming specifically the ability to utilise latest trends in technology is limited due to the inconsistencies in 3G/4G/Satellite/Microwave in the region
- The cost to rollout fibre to business locations in most circumstances is prohibitive to the businesses consulted and although this would be their preference, due to the cost they are having to deal with the limited speed available through satellite/microwave
- Boosters are being used by carriers in some businesses to improve phone connectivity, however in manufacturing and agriculture, due to the size of the facilities/crops, the connectivity is only good for office locations and not on the floor (or in the crops)

4.2 Community Consultation Engagement Overview and Analysis

13 businesses were engaged to discuss their digital connectivity posture within the region. The following is a breakdown of the types of businesses contacted. Contact information was received from both the council as well as the survey results in question 9.

Businesses Consulted
- Tourism – 1
- Agriculture and Farming – 2
- Trade – 2
- Education – 3
- Manufacturing – 2
- Services – 1
- Healthcare - 2

Staff amount	Business Count
1-10	4
10-49	3
50+	6

Discussions were based on the following topics:

- How is digital connectivity supporting or otherwise impacting your business?
- What avenues have you explored to further support your business through connectivity?
- How important is connectivity to your business?
- Is connectivity impacting your ability to grow your business?
- What types of services do you have available and how supportive is your telco provider with recommendations?
- Can your workforce work from home and how is digital connectivity impacting their ability to do so?