Denman and Hornby

Connectivity Research
and
Public Consultation

Part One of the Two-Part
Digital Roadmap & Implementation Plan

Prepared for:
Comox Valley Regional District

By:
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with the assistance of Baylink Networks Inc.

BAYLINK networks

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EXECUTIVE SUMMARY – OVERARCHING PART 1 AND 2

This paper develops a strategic intervention to improve the digital connectivity of the under-served communities of Denman Island and Hornby Island.

This project to improve connectivity emerged because of the deep dis-satisfaction with inadequate broadband services on these neighbouring islands in the Salish Sea, part of the Comox Valley Regional District. The substandard internet service on these islands is based on obsolete ADSL technology that is uneconomic to upgrade. The community will have to either partner with an experienced service provider to replace the ADSL with modern telecommunications infrastructure or build this itself.

Over the last 18 months committees formed on each island, then joined forces to engage the entire community in an intensive consultation process. The committees set out to better understand local connectivity possibilities and better inform the community. They learned of the connectivity guidance and funding available from British Columbia's Information Communication Technologies Directorate and the federal Broadband Fund, and determined to seek their assistance. British Columbia's Connected Communities program defines a "connected community" as:

"Applies a digital mindset to reimagine itself in today's interconnected world. Digitally empowered connected communities purposefully integrate technology into all aspects of community development to improve livability, workability and sustainability, while leverage existing resources in new ways to achieve greater economic, social and environmental outcomes."

The Ministry has depicted the route to connectivity in the following graph:

Connected Communities BC: Digital by Design Roadmap
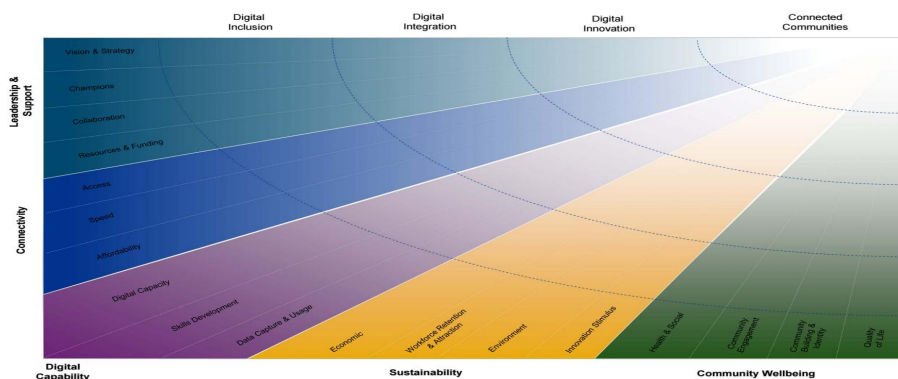
With guidance provided by the Ministry of Citizen's Services in direct communications and in this definition and chart, the Denman and Hornby community has considered all aspects of the route to digital connectivity. This examination is presented in our attached, comprehensive, two-part report. Surveys were conducted with unusually high response rates, documenting the inadequacy of the internet in the community, disclosing problems this causes for individuals, groups and the economy, and demonstrating the many aspirations within the islands for a better future with advanced digital connectivity. Funding was obtained from ICET, NDIT, Denman Works and HICEEC which allowed the committees to hire experienced telecommunications expertise and develop a Digital Roadmap, Implementation and Business Plan.

The Current Situation

The rural, remote communities of Denman and Hornby need strong connectivity. Their populations (Denman – 1,165; Hornby 1,016) are growing faster than the BC average, raising the need for services. They have key groups with particular requirements for good quality, reliable broadband (seniors, school-age children, businesses). Seasonal residents are of central importance to the economy of these islands; this sector has critical needs for strong internet. Better connectivity is closely linked to objectives for improvement in public safety and services, for the expansion of individual firms, shops and studios, and for enabling skilled residents to build their vocations from home.

Through its two surveys, the committees learned of the depth of the internet problems on the two islands, and the dimensions of the market for improved service. Both surveys attained response rates exceeding 30 percent. They found no islanders receiving broadband at the level of service established by the federal government as a standard (that all Canadians should have broadband providing a minimum download speed of 50 Mbps and an upload speed of 10 Mbps). Speed testing from the surveys revealed that on each island, over 95 percent of respondents recorded download speeds below 25 Mbps, and nearly one-half were below 6 Mbps.

- On Hornby, with 560 occupied households:

  o 127 of 229 survey respondents use the internet for business, and 79 percent say it is inadequate to conduct their business effectively;
  o 54 percent of respondents include seniors, who are major internet users for social, health, business and entertainment purposes;
  o 22 percent include school-age children, and none are satisfied that their internet supports children's education as a study and research tool. Ninety-five percent report speeds below 15 Mbps.
  o 25 percent are primarily seasonal residents, and one-half said poor internet stops them from becoming full-time residents or spending more time on the island.

- On Denman, with 592 occupied households:

  o 135 of 198 survey respondents involved seniors, and 40 percent of them say the internet is inadequate;

o 16 percent of respondents include school-age children, and 82 percent are not satisfied with their internet service;

o 10 percent are primarily seasonal, and 79 percent of them are dis-satisfied with the internet;

o All business respondents are dis-satisfied with their internet;

The committees informed the community of these findings and began discussions of potentials for improvement. Articles and letters were published in the locally-popular weekly newspapers and three widely-used local Facebook groups. Individual mini-interviews were conducted with all institutions and most businesses in the community to learn of their needs and aspirations concerning connectivity. Other consultation measures included radio interviews and presentations at well-attended public events. The main events were two public Open Houses (each drawing over 70 attendees) and four other public meetings (each drawing over 30).

Three other key findings emerged from this extensive consultation:

- The community is proud of its attentiveness to the environment. It sees improved connectivity as means of replacing travel, which would reduce its carbon footprint as well as lowering its expenditure on travel;

- The community has a vision of universal Fibre to the Premise (FTTP) on both islands advancing the social and economic lives, health, safety and enjoyment of all residents;

- The community is deeply concerned about electro-magnetic frequencies emitted by wireless devices and is prepared to expend more to obtain FTTP service. The interest in obtaining improved cellular service was discussed but is not as strong a concern as the interest in FTTP.

The surveys and consultation process have developed the communities' objectives and identified the market for better broadband. All these factual components and process findings contribute to a strategic plan to improve Denman/Hornby connectivity.

Design of an Improved System

The technical assessment of the situation is contained in the Feasibility Study, including a design to build an appropriate fibre-optic network and a study of the financial feasibility of approaches to the realization of this construction design. This research was undertaken by Baylink Networks which designed, costed and assessed likely business plans for a broadband network that would efficiently meet the communities' current and future needs.

Baylink developed a network plan for universal coverage linking the islands' 1600 homes and businesses. The plan development included a detailed study using large-scale Google Earth digital mapping plus ground truthing, considerable reference to other projects, specialist suppliers and contractors, many regulators, and the development of multiple spreadsheets that created and tested several construction/business alternatives.

The network design contains two main components, Backbone or Backhaul, and Last Mile or Fibre to the Premise.

- Two methods of securing backbone are presented: purchasing from Telus at the Denman Island CO; or purchasing from Shaw at Buckley Bay and then bringing it by submarine cable to this CO. Telus' very high quote for selling the capacity made the more complicated Vancouver Island purchase more economic.

- From this CO high-count fibre optic cable would go southeast across Denman Island to make another submarine crossing near Gravelly Bay to Hornby Island. On Hornby the cabling would extend to a second CO near the Co-op store. These COs or POPs, would have minimum capacity of 10 Gbps, capable of expansion to serve all needs for several generations.

- Two methods of building the Last Mile were considered, aerial (involving 2079 poles and 137 kms of backbone routing) and underground (requiring three crews each installing about 200 meters per day). Many implications of both methods were assessed, including timings, regulatory processes and ongoing maintenance.

- Two technical systems for the FTTP connectivity were examined, Passive Optical Network and Active Ethernet System. Either would accommodate multiple applications simultaneously (internet, telephone, television, other).

- Permitting, construction, maintenance and servicing requirements (involving time, staff, equipment and modalities) were all examined in detail and incorporated in spreadsheets and Gantt charts as part of the analysis of feasibility and viability.

Underground deployment and a PON network were recommended because of community characteristics (although an ethernet hybrid might be considered in a few sectors).

- Total construction costs are estimated at $10.289 M.

- Once constructed, monthly operating costs (gateway, staff and overhead, maintenance and equipment, insurance, others) would sum to $58,116.40

- This valuable broadband network design would be profitable to operate. Estimated monthly revenue would range from a conservative $77,000 (1,100 subscribers averaging $70 fees) to an aggressive $154,000 (1,400 subscribers averaging $110 fees).

Alternative Plans

Assessments were made of financial implications for four alternative modes of organizing the implementation/ownership of the proposed underground fibre broadband network. The implementation/ownership models all involve Denman/Hornby participating with the "owner" in securing

government funding of 75% of project costs, and this would require active island involvement in the project construction/start-up for approximately three years. The models are:

- Owner builds and operates, in some kind of relationship to Denman/Hornby group;

- Owner operates, but hires out the construction. Has some kind of relationship to Denman/Hornby group;

- Owner is a community development corporation, successor to Denman/Hornby group. Owner is in a joint venture with a builder/owner/operator (as in 1. above), receiving 10% of profits above a threshold and 10% of any sale proceeds, and with a specific arrangement that it could influence rates and service levels,

- Owner and operator would be Telus, and the network would be to its design, primarily aerial on existing poles, with a Telus-defined project cost of $11,565,000. Denman/Hornby (with CVRD assistance) would make a significant contribution to the actual build costs (perhaps $300 -500,000), and would partner with Telus in applying for government funding.

It was observed that in all models except 4. (Telus), Denman/Hornby would have an ongoing critical role requiring managerial/financial skill and perhaps involving liability.

Conclusion

Denman and Hornby Islands need better internet and want to develop their community with better connectivity. The islands' committees have conducted an intensive, thorough consultation process that developed these findings in depth and helped inform the community. All of these factors are described in detail in Part One of this comprehensive report, inspired by British Columbia's "digital roadmap" model.

Part Two of this report is an examination of the feasibility of building a broadband network on Denman and Hornby that would meet the community's needs, and provide the capacity to serve all aspirations for their future. The examination was conducted by Baylink Networks, an experienced telecommunications engineering firm, under a contract made possible by grants obtained from ICET, NDIT, Denman Works and HICEEC.

A quality, low-maintenance, underground fibre optic network that would meet and exceed the bandwidth needs of the community for the foreseeable future, can be built on the Islands. It would serve every home/business on the islands with fibre optics (no wireless infrastructure), and can supply internet, phone, TV and any other telecommunications services. It could be built for a total construction/installation budget of $10,289,668.

It would be possible to construct an aerial network less expensively, but because of known risks associated with implementation and costs, aerial infrastructure is only viable, financially, for Telus.

The construction and start-up of a high-capacity fibre-optic network service is greatly needed on Denman and Hornby Islands, and this will require a complicated, lengthy, and expensive project.

INTRODUCTION

This section provides essential facts about Denman and Hornby islands, our community, and the project to improve our connectivity.

Context

Denman and Hornby are northern Gulf Islands in the Salish Sea, in British Columbia. They are considered rural and remote, as they are 'boat access only'. No airport or bridge serves them - access is provided from Vancouver Island by the British Columbia Ferry Corporation. To access Hornby, one takes the ferry from Vancouver Island to Denman Island, and then drives across Denman to take a second ferry to Hornby.

Denman and Hornby are within the jurisdiction of the Comox Valley Regional District and they are part of the Islands Trust, which controls land use and encourages conservation in the Gulf Islands. The islands have local, volunteer quasi-governmental organizations called the Hornby Island Residents and Ratepayers' Association (HIRRA) and the Denman Island Residents Association (DIRA) that assist in defining priorities and public operations.

There are limited internet services available on Denman and Hornby Islands. The only wired internet is the Asymmetric Digital Subscriber Line (ADSL) service provided by Telus. A few other Internet Service Providers (ISPs), such as Uniserve and Lightspeed offer products that make use of the Telus wires. Satellite internet is available from Xplornet. Telus and Bell offer plans that access the internet using their cellular systems. These plans are only available in specific areas, and only to a few residents. Some 'tether' their computers to cellular telephones or use cellular phones to browse. These methods have high costs and limited service. The islands rank among the bottom 10 percent in Canada for speed, reliability, and availability in internet service.

Population

Following are some key characteristics of the populations of these islands, as revealed in the 2016 Census of Canada.

Denman   In an area of 51.03 km² (19.7 sq.mi.), Denman's population includes:
- 1165 residents in 590 households;
- 125 children aged 0-19 years (11% of all);
- 595 people of working age - 20-64 years (51% of all);
- 440 people aged 65 years and older (38% of all).
- Denman grew 14 percent from 2011 to 2016.

Hornby   In an area of 29.97 sq. km. (11.57 sq. mi.), Hornby's population includes:
- 1016 residents, living in 560 households;
- 105 children aged 0-19 years (10% of all);
- 515 people aged 20-64 years (51% of all);
- 395 people aged 65 years and older (39% of all).
- Hornby grew 6 percent from 2011 to 2016.

The islands' populations differ from most BC communities in some characteristics which are relevant to their relationship with the internet. The Comox Valley Community Foundation's 2018 report "Vital Signs" found that Hornby had the highest poverty rate in the CVRD, with Denman Island in second place. Hornby's median household income was $35,328, while the BC average was $69,995. Denman is growing faster than most BC communities (BC average growth was 5.6%). The proportions of seniors on both islands are greater than the British Columbia norm (19%), and there are fewer children than the provincial average (20%). The populace is more highly educated than the BC norm, with 70% of Denman and 68% of Hornby possessing a post-secondary certificate, diploma or degree (BC average is 55%). Many residents are self-employed or work more than one job.

These Denman and Hornby characteristics have implications for connectivity:

- The population is widely dispersed through the Islands, so internet services must cover large areas. In many rural, remote and northern communities service can be concentrated at a central community area or along a few roadways. On Denman and Hornby this is not feasible.
- Educational achievement correlates with internet access. Children require solid internet connections to study, learn and recreate, just as children do in Canada's large urban centres.
- The population is more educated. Educated people use the internet more.
- Island businesses are usually dependent on the internet for banking, billing, marketing, scheduling, etc. 'Bricks and Mortar' alternatives are not available on either island. There is only one banking institution, no big box stores or franchises. The commercial sector is small in scale, much of it home studio based, and mostly with individual entrepreneurs.
- Seniors find the internet brings entertainment and services they desire and provides the ability to maintain family contacts through tele-conferencing programs like Skype.
- There are many seasonal residences, and their owners expect to access the internet. If good internet is not available to them, seasonal residents will seek properties elsewhere, or visit less and stay for shorter periods. They will spend less on the islands, reducing the economic sustainability of the islands.
- Young people want good internet access and choose not to locate on these islands because it isn't available.

Broader Context

These communities take pride in their hospitality, their arts community and their legacy of creativity. Dates and details of festivals, fairs, shows, exhibitions, music, recreation and special events can be seen at www.hornbyisland.com/EVENTS or www.visitdenmanisland.ca. The communities are committed to environmental protection and are very appreciative of like-minded visitors.

- Hornby is blessed to have approximately 1/3 of its land mass in parks and most of the ocean foreshore is accessible. Tribune Bay Provincial Park boasts one of the finest sandy swimming beaches in B.C. Helliwell Provincial Park offers a 5 km. walk that circles along spectacular bluffs and through old-growth forest and Garry Oak meadows. The Mt. Geoffrey Parks have an extensive trail system for hiking and mountain biking. These features contribute to a tourist-based economy, resulting in needs to provide services that tourists expect.

- Denman Island offers a beautiful, natural environment with opportunities for active recreation or restful recreation. Boyle Point Provincial Park is on a breathtaking 125-hectare waterfront parcel at the south end, affording eagle watching, especially during the spring herring run. Sandy Island Marine Provincial Park is a rare niche of sand dunes, fragile vegetation, diverse animal species, and a home to a variety of birds. Fillongley Provincial Park's 23 hectares feature some of the largest remaining stands of Douglas Firs and Cedars in the region, with walking trails around the Beadnell Creek salmon-spawning habitat.

This discussion of the characteristics of the community has demonstrated that Denman and Hornby have fundamental qualities that lead to needs and interests in improving connectivity.

Project Chronology

The Denman-Hornby internet improvement project emerged over the last few years.

In late 2015, the Hornby Island Community Economic Enhancement Corporation (HICEEC) collaborated with Telus to investigate ways to improve service on Hornby Island. This led to an upgrade of the ADSL infrastructure on the SE corner, bringing internet service to unserved properties and providing improved speeds to others. This project was completed in March, 2018. Telus then informed HICEEC that there would be no further improvements because Telus would no longer install or add to this old ADSL service.

The Denman Island Internet Committee (DIIC) was formed on June 28, 2018 as a committee of DIRA. Over the next month it notified the community of its existence with articles in the weekly newspaper The Grapevine (delivered to all mailboxes on both Denman and Hornby Islands), as well as by postings on the Denman Island Facebook Bulletin Board.

In August, 2018, DIIC conducted an online and paper survey that produced 185 responses from Denman's 592 households. It published the survey findings, including producing a 21-page survey report that was made available online. This survey, and a 13-response 2019 addendum, is attached as Appendix A

On September 20, 2018 DIIC met with HICEEC and the two committees realized they have common goals and should work together to improve connectivity. The committees learned that funding was available from both the Federal and Provincial Governments to assist remote and rural communities to obtain better internet. There were challenges in learning how to qualify for some of this money. Investigations included:

- learning how other communities had approached similar problems and achieved success;
- many conference calls with management of our current primary service provider, Telus;
- attending presentations by the Provincial Government;
- asking for and receiving support from our MP, our MLA, and our representative at the CVRD.

The committees learned about the federal/provincial Connected Coast project that will bring fibre-optic capacity up both sides of Vancouver Island, discovered that Hornby and Denman were not on the list of communities to be served, and held discussions with the project's manager, the Strathcona Regional District.

With assistance from the BC Ministry of Citizen's Services, the committees learned how to apply to senior levels of government for funding to allow them, in conjunction with an experienced technical contractor, to plan for the installation of a new, state-of-the-art, fibre-optic infrastructure on the islands. An application would have to include an experienced ISP to operate the new fibre system. They learned that they should hire professional assistance to produce a Digital Roadmap and Implementation Plan. This plan would identify

what directions the community wishes to take in relation to digital connectivity, and would contain a financially-feasible technical design by telecommunications engineers that would deliver on those aspirations.

The committees identified two sources of funding that could enable the required planning phase. These were: the Island Coastal Economic Trust (ICET) and the Northern Development Initiative Trust (NDIT). The committees began preparations to apply to these trusts for planning support grants. A consultant was sought who could undertake the demanding Digital Roadmap and Implementation/Business Plan task. The committees secured a few proposals and selected Baylink Networks Inc., a company with a 30-year track record in the telecommunications field. The committees began active promotion of the project within the community, including obtaining letters of support from:

- The Comox Valley Regional District
- Hornby Island Trust, local council
- Island Trust Chair, Peter Luckham
- Denman Island Trust, local council
- Denman Island Residents Association (DIRA)
- Hornby Island Residents and Ratepayers Association (HIRRA)
- MLA Scott Fraser
- Member of Parliament Gord Johns
- School Trustee, School District 71, Sheila McDonnell
- Hornby Island Community Economic Enhancement Corporation
- Denman Island Works (economic enhancement)

With excellent guidance from ICET and NDIT grants totaling approximately $35,000 were secured from these trusts by September 2019, and $15,000 was raised locally from Denman Works and HICEC. Baylink Networks was contracted to complete the Digital Roadmap and Implementation/Business Plan.

THE DIGITAL ROADMAP

The committees learned of an initiative within the BC Ministry of Citizens Services, entitled Connected Communities BC that has provided guidance on the development of the digital roadmap. This is important because the Denman-Hornby project will apply to this Ministry for the funding to enable our community to improve its connectivity.

Connected Communities BC: Digital by Design Roadmap
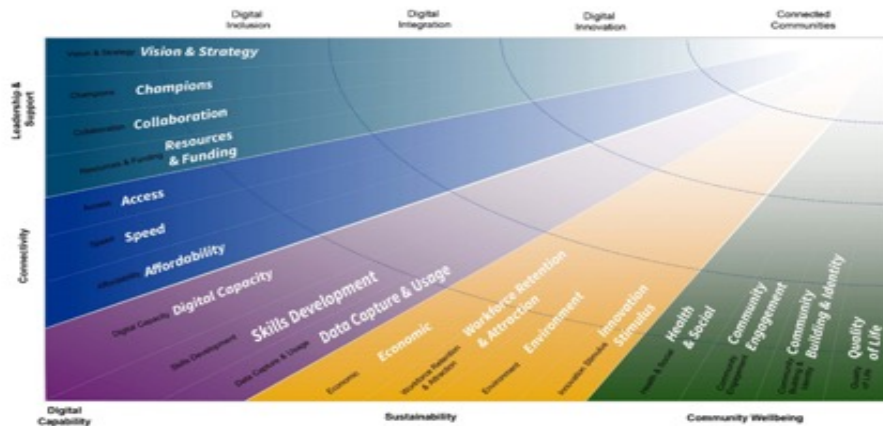
The Ministry has provided a model of the roadmap, a framework tool that supports communities to establish their own digital roadmap for future development and advancement. With this tool, and this knowledge, and the funding support from ICET and NDIT and others, and the skills and knowledge available from Baylink Networks, the committees moved forward with a program to consult the community about digital connectivity.

CONSULTATION IN THE PROJECT

A concerted consultation program to inform the community and discuss connectivity, both now and in the future, and to explore the community's views began in early September, under the guidance of the committees and Baylink. This section describes the consultation program.

An online survey was developed for Hornby Island to parallel and improve on the survey conducted in 2018 on Denman. Based on the Denman survey, the new survey was improved to better bring out the community's digital needs and aspirations. HICEEC staff distributed the survey, on paper and online, from September 26 to November 12 of 2019. The survey was advertised by a social media campaign, and by sandwich boards that were placed strategically in the community. HICEEC delegation reports were made at community groups' meetings, which had average attendance in the 30 person range. When it closed on November 12, the survey had attracted 229 responses from among Hornby's 560 households. Both the Denman and Hornby surveys achieved high rates of response.

The report on Hornby's survey is attached as Appendix B.

A public campaign to better inform the community about the project was designed, and began by mid-September. A series of six informative articles were prepared and published in the Denman/Hornby weekly newspaper, The Grapevine. These were:

Sept 12 -   Ty Runkle's notice of the coming series of articles
Sept 19 -   Ty Runkle's article about Telus's ADSL service, its capabilities and shortcomings
Oct 3   -   Ty Runkle's article about minor ways of accessing the internet (SmartHubs and Satellites)
Oct 10   -   Peter Spurr's article about a future life with improved internet
Oct 20   -   Ty Runkle's article about the context for improving connectivity
Oct 30   -   Peter Spurr's article summarizing the situation, advertising the Open Houses

These articles are available at: www.hornbydenmaninternet.com.
After consultation with the experienced Baylink staff, personal contact was sought with representatives of all sectors of the economy on both Denman and Hornby Islands to ask about their current digital situation, their future aspirations for digital connectivity, and any limitations they experience. Inquiries were made to these groups: businesses, arts & culture organizations, tourist services, retail, education providers, clubs, research organizations, affordable housing projects, medical, emergency services, health providers, banking, library, B.C. Ferries, and local government.
After committee representatives attended the Vancouver Island Economic Summit, additional questions arose. Questions were taken from a card deck supplied by the Ministry regarding digital aspirations at the community level. A questionnaire was developed with 19 talking points. This questionnaire was distributed to the 30 attendees at the HICEEC Fall '19 Business Mixer & Business of the Year Award Presentation, the

Hornby Ferry Advisory Committee (which represents 6 sectors of the economy), and was posted online, using Survey Monkey.

Appendix C is a report in tabular form, entitled "Connectivity on Denman & Hornby - Current State and Future Needs". It combines the input obtained from the personal contacts and the feedback from the 19-point questionnaire.

A representative of HICEEC, Karen Ross, gave an interview on CHFR-FM - Hornby Radio - FM 91.5. (This interview is available at www.hornbydenmaninternet.com)

A social media campaign was undertaken to encourage individuals to provide their thoughts about the state of the internet and their needs and aspirations for future connectivity. The platform used was "Hornby Island Community Connections", a Facebook group with over 1600 members. The dialogue was shared on the "Denman Open Bulletin Board (Taystayic)", another Facebook group with 1574 members. Professions of respondents include: farmer, senior management/manufacturing, medical doctor, ESL teacher, website developer, Conservancy Hornby Island, politician & management consultant, dance studio owner, music booking agent, Federal Job Shop contractor, photographer, engineer, medical journal editor, B.C. Arts Council adviser, artist, architect, graphic artist, mortgage lender, landscape designer, online book store, homeschooling parent, architect, ferry crew, entrepreneur, software developer, mixed media artist, research librarian, artist & educator, virtual reality testing and production, instructor of Business & Marketing, work from home Mom, movie industry product placement, educator, and videographer.

Appendix D provides a listing of these respondents with quotations they offered. The Appendix is structured to demonstrate the community response to each of the five strong foundational elements identified in the Ministry's Digital Roadmap model. By examining the wide coverage of each foundational element by the community, it is possible to observe the communities position along the four stages of digital development (also provided by the Ministry's model). These stages of digital development are:

Digital Inclusion - Basic communication provides inclusion and access to vital services such as first responders. Limited connectivity restricts a community's ability to benefit from a digital economy.

> The Denman/Hornby community is clearly at this stage, with some basic communication but restricted by limited connectivity.

Digital Integration - Moderate connectivity supports most business and community needs, fostering greater integration and access to improved services
.

> The Denman/Hornby community achieves integration in a few respects, but integration and access to services clearly need improvement.

Digital Innovation -Good connectivity and digital capability supports a knowledge workforce and attracts talent that drives innovation and growth opportunities.

> The Denman/Hornby community is aware of these possibilities and aspires to advance itself into this stage.

Connected Communities -The community has differentiated itself; it is at or near the forefront of a sector or area of expertise due to how it has adapted to enable and support digital innovation. It is known for its innovative and entrepreneurial culture.

> The Denman/Hornby community can achieve this level once it has advanced to, and consolidated itself within, the innovation stage.

The main component of the consultation program was a pair of widely-publicized Open House meetings, held on Denman and Hornby on November 3. The meetings were advertised with notices in The Grapevine weekly newspaper, The Hornby Tribune weekly advertising flyer, and both islands' monthly newspapers. Large billboards advertising the events were placed in key locations on each island. Each meeting was attended by about 70 people who showed strong interest in the subject and held active conversations.

The meeting rooms had display posters and maps, and attendees were invited to write on the posters to display their opinions.
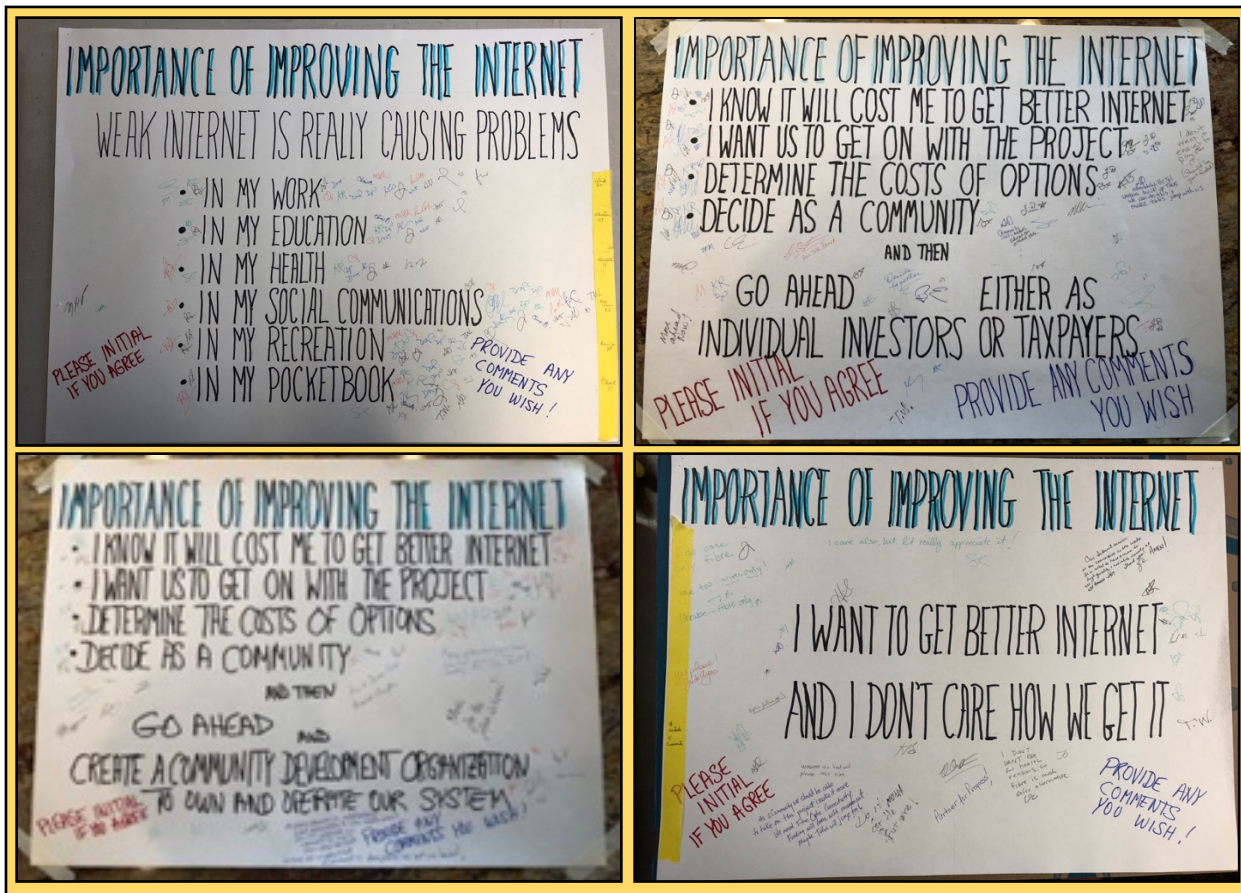
Attendees signing the boards and wrote comments demonstrating their interest in these "Importance of Improving the Internet" exhibit boards.

On the board that said "Weak Internet is Really Causing Problems" there were a total of 109 entries, divided evenly between the categories:
- in my social communications;
- in my pocketbook;
- in my work;
- in my recreation and
- in my education

The category "in my health" produced slightly lower entries.

The board that introduced a community development organization as an option for improvement attracted 55 entries, of which 13 were specifically for community development organization. The matching board that introduced individual investment or a local tax as an option for improvement attracted 71 entries, of which 19 were specifically for individual investment or a local tax.

Twenty-nine wrote on the board that said "I Want to Get Better Internet and I Don't Care How We Get It".

Following the opening period when people reviewed these exhibits, each meeting moved to a presentation phase led by a moderator. The presentations began with a committee member describing the overall project, key aspects of what it has learned and what it proposes to do. The committee explained the Telus proposal to provide Fibre To The Home to the two islands if the islands provide a base payment and partner with Telus to apply to the senior governments for funding. Next, Baylink Networks was introduced and gave a presentation on fibre-optic internet, its capabilities, and the manner in which it could be installed. The meetings were opened for questions and at both meetings there were lively discussions about the connectivity situation and how to remedy it. There was interest in the Telus proposal and a general feeling of dis-satisfaction with Telus' record of providing service that did not live up to Telus' promises. At the Hornby meeting there was an expectation among the attendees that the committee might advocate a wireless solution, and the crowd was delighted to learn that this was not true. In both meetings there was a clear consensus that a fibre-optic distribution system throughout the islands would move our community towards many of its personal and group objectives.

The meetings ended with the committees undertaking to produce options for connectivity improvement for the community to consider and decide upon, early in 2020.

CONCLUSION

The Denman-Hornby Internet Improvement Project has engaged in a thorough process of consultation. It has sought to learn about options and encourage the community to form opinions about its digital connectivity. This process has established that the community is dis-satisfied with its present, poor connectivity, that it does not favour wireless-based improvement, and that it supports the concept of a fibre-optic based service. This consultation is part of the project to produce a digital roadmap and implementation/business plan. The next step in this consultation process will be to present options to the community and seek the communities' views about their preference among these options.

APPENDIX A
DENMAN ISLAND INTERNET SURVEY

Denman Island Internet Committee

October 8, 2018

Executive Summary

This reports on the survey conducted on Denman Island during August of 2018 by the Internet Committee (DIIC) of the Denman Island Residents' Association. It collected information from residents about their use of, needs for and satisfaction with current internet services. The "Denman Island Internet Survey" is available on the internet in a public folder at https://tinyurl.com/yaxqxpyt.

The survey closed after Labour Day with 185 completed questionnaires.

Denman's population is growing quickly with key groups that require good quality, reliable internet (seniors, school-age children, businesses). Also, good internet attracts seasonal residents, who are important to Denman's economy.

Only 5% of Island households do not use the internet. Users access the internet via ADSL (copper cable) from Telus (126 of 185 responses), satellite from Xplornet (34 of 185), or tethered cellphones offered by various providers (12 of 185).

Telus service comes from two points which it calls Central Offices, located at Kirk and Northwest Roads, and on East Road at McFarlane. The speed of users' access declines with distance from these offices, until no reliable service occurs at about 5 kms. This causes service gaps in (1) the East/Corrigal/Jemima area; (2) south of Fillongley (Balkie/Dalziel/Swan/ Schmidt); (3) northern Denman (Komas, etc) and (4) southwestern Denman (Lacon/Reginald/Dusty).

The satellite service provided by Xplornet can usually be accessed anywhere, but it can be blocked by terrain or heavily forested areas. People can tether computers to cellphones to access the internet, but this requires a strong cellular signal (which is scarce on Denman), and the user must have an adequate and affordable data plan (which is not common among cellphone users).

Availability notwithstanding, significant problems were found with internet service on Denman.

- Nearly 40 percent of respondents indicated their internet speed or capacity is inadequate for their enjoyment, and one-half of these respondents also said it is inadequate for their business.
- 33 respondents said their enjoyment or business would improve with better internet.
- One-half of the 19 seasonal residents who responded said if better internet was available they would acquire it, and one-third of them reported their internet was inadequate for either their enjoyment or their business.
- Seniors' views about their internet service were varied, with one-quarter reporting satisfaction, one quarter finding their service inadequate at certain times, and one in six reporting it is inadequate for their enjoyment.

- About one-half of the 30 responding households that had school-age children, said they would acquire better internet if it was available, and about one-third said it is inadequate at certain times. Five of the households said they would consider leaving Denman because of the internet.
- None of the business respondents indicated they are satisfied with their internet service.
- 32 percent of respondents said the price of the internet is too high.

Only one in three respondents indicated they are satisfied with their internet services.

According to the CRTC, the regulator of Canada's telecoms, 82 percent of Canadians enjoyed a download speed of 50 Mbps and 10 Mbps for uploads as of 2015. That is far faster than the level of service obtained by any Denman user. The CRTC target is for all Canadians to experience this level of service by 2021.

- 95 percent of the 462 speed tests reported in the Denman survey were below 25 Mbps (half of the CRTC standard).
- 54 percent of users' download speeds were below 6 Mbps.
- As is characteristic of copper cable internet service, download speeds fall when the number of internet users is high.
- Four geographic areas have low internet speeds, and they generally correspond with the gaps in Telus service.

Comparisons of survey findings in relation to the two main ISPs did not produce findings, but differences were evident in the firms' service characteristics.

This response constitutes a random sample, accurately representing the situation and opinions of Denman Island households. It should be valuable to begin conversation with service providers and regulators in pursuit of better internet services.

Introduction

This reports on the survey of internet services conducted on Denman Island during August of 2018. It is primarily an information piece, informing Denman Islanders of the internet services they receive, and their views about it.

Denman is a thriving island community with a 2016 population of 1,165 persons living in 595 households,[1] in an area of 52 square kilometres. Population characteristics have implications for Denman's requirements for internet services, and Denman's population differs from typical characteristics seen in British Columbia.

Denman grew 14 percent from 2011 to 2016 while the population of British Columbia grew by 5.6 percent. Denman's 2016 population includes:

        125 children aged 0-19 years (11% of all);

        595 people of working age - 20-64 years (51% of all);

        440 people aged 65 years and older (38% of all).

The proportion of seniors is greater than the British Columbia norm (19%), and there are fewer children than the provincial average (20%)[2]. About one-half of its population is considered to be "in the labour force" (515 people), and of these workers, 210 are classified "self-employed". Denman Islanders are more highly educated than the BC norm, with 70 percent possessing a post-secondary certificate, diploma or degree (BC average is 55%), and 40 percent have a university degree (compared to 25 percent overall in BC). The 3.4 percent who have doctorates (35 people) are nearly 4 times BC's rate of PhD's per capita.

Denman's characteristics give rise to a few issues concerning internet services. Its population is spread throughout the Island, so widely dispersed internet services are required. This differs from the internet situation in many rural, remote and northern communities where service can be concentrated at a central community area or along a few roadways. Educational achievement correlates with internet access. Denman children require solid internet connections to study and learn (and recreate) just as children do in Canada's larger urban centres. Denman's households that are more educated have greater needs for good internet facilities. Island businesses, particularly self-employment, are usually quite dependent on the internet for functions like banking, billing,

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[1] Data for Denman Island Trust Area from Census Profile, 2016 Census of Canada. These are private households occupied by usual residents.
[2] In the next decade, 70 children should advance to the working age group, increasing it slightly, while 290 people should move from the working age to swell the senior age group.

marketing, scheduling, etc. Denman's seniors increasingly find the internet brings them entertainment and services they desire, and the ability to maintain family contacts through tele-conferencing programs like Skype. A particular requirement on Denman arises from the sizeable component of seasonal residences, as these inhabitants increasingly expect to be able to access the internet. If good internet is not available to them, seasonal residents will seek out more suitable properties elsewhere. And finally, the large working age group finds the internet has important entertainment and informational functions that are a regular part of their daily lives.

There are limited internet services available on Denman Island. The only wired internet is ADSL service (Asymmetric Digital Subscriber Line) provided by Telus. A few other ISPs (Internet Service Providers) offer products that make use of the Telus wires (the survey found Uniserve and Lightspeed). Wireless internet is available from one ISP, Xplornet. Several telephone companies sell programs that allow users to access the internet using their cellular phones (e.g.: Telus Mobility's Smart Hub, Bell Mobility's Turbo Hub, Rogers' Rocket Hub). All of these methods of accessing the internet are sold by ISPs with claims about the speed and capacity that they provide, and with varied contractual arrangements and prices. There are also a few less-formal methods of accessing the internet, including "tethering" computers to cellular telephones, or just using cellular phones to browse. These alternative methods usually entail higher costs and diminished qualities of service.

In this context of Denman's characteristics, issues and limited internet services, Denman Island's Internet Committee (DIIC) was created in June 2018. The Denman community had learned that Hornby Island's community association had recently undertaken activities that had resulted in improvements to some of their internet service. A committee formed to find ways to improve internet service on Denman Island, and this became an affiliate of The Denman Island Residents Association (DIRA). The new DIIC committee developed a survey in order to obtain accurate information and resident's views about current internet use, as well as the demand for internet services and the degree of satisfaction with the present services. The Committee plans to use this information to make the case to ISPs and regulatory authorities that Denman's internet requires improvement.

The DIIC survey was designed as a universal study of Denman Island's internet situation. After pre-testing, the survey was launched August 9, making use of several channels. When the survey closed on September 5th, 185 completed questionnaires had been accumulated[3].

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[3] One completed questionnaire came from a household on Hornby Island, so it was put aside.

Coverage of Denman's Survey Response

This section examines the representativeness of the response to the survey. The survey was designed to be universally available and appealing so people would be encouraged to respond to it.

- It had a minimal geographic identifier, three "tick the box" choice questions, and a simple speed test.
- The survey instructions required that each household submit only one survey for each ISP. The completed surveys were checked to ensure this instruction was followed[4].
- The administration of the survey was aimed to reach the entire population. Paper questionnaires were delivered: to all Island mailboxes on August 9 within "The Grapevine" weekly newsletter (Denman Island circulation - 675); available from August 9 in a box within The Denman Store; and on August 18 at the popular Saturday Market. An online version employing SurveyMonkey was provided 24/7 for 27 days, and a PDF version was distributed via e-mail to DIRA's entire address list on August 9, and was also available on a public web folder. Articles were printed in "The Grapevine" to introduce the survey and describe its availability, and notices were placed on Denman's Facebook bulletin boards. Later reminders to complete the questionnaire were published in both locations. These arrangements were augmented by some door-to-door delivery/reminders within three districts (Komas, Fillongley and southern Lacon Road). A prominent sign reminding people about the survey was placed for several consecutive days on each of the three roads that lead into Denman Island from the Denman West ferry terminal.

No significant biases are identified in the survey design and administration that limit it as a random representation of Denman households.

The return of 185 completed questionnaires is a strong representation[5] of Denman's 595 private households (31% sample). Questionnaires were received from addresses on 37 different roads, which is most of the roads on the Island. When plotted on a map, this distribution is clearly representative of the entire Island geography.

The response also represents vital groups within Denman's population that are significant parts of the communities' structure, and important to the goals of the Committee. The survey's coverage of seniors is exceptionally strong. While the Census reported 38 percent of Denman's population was over 65 years, 129 of the responding households reported seniors present (70% of the survey response). Thirty households reported having school-age children present, while the 2016 Census revealed that Denman has 120 private households with children (25% sample). The survey represents Denman's SMEs (Small to Medium Enterprises) – 44 questionnaires contained specific

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[4] In two cases questionnaires were completed showing two ISPs, and follow-up contacts refined the responses so each questionnaire only dealt with a single provider.

[5] There is considerable variability in response rates to surveys. A typical response for a self-administered paper survey is in the 7-10 percent range, while online surveys seldom achieve 5%. Surveys administered by an employer within a workplace, where people are motivated to respond, often achieve returns in the 30-50% range.

business perspectives (35% of all responses). Nineteen responses (10% of all responses) came from households reporting as primarily seasonal residences. Seasonal residents are vital components of Denman's economy, adding purchasing power and supporting considerable work in construction, gardening and services. Each of these groups has particular needs for internet services that are important, particularly from the perspectives of regulatory agencies seeking to foster strong economies and equitable services, within provincial or national communities.

It is concluded that <u>this survey response constitutes a random sample</u> of Denman Island households, and a solid representation of key groups that are important from the perspective of internet regulatory policy.

Internet Access and Satisfaction

The most obvious finding of the survey is that <u>Denman Islanders are strong users of the internet</u>. Ninety-five percent of the survey respondents use the internet somehow, and only 9 respondents did not.

Internet Access on Denman Island, All Respondents and Key Groups (as reported in the Denman Internet Survey)						
	All Households		**Households with One or More Seniors Present**		**Households with One or More Children Present**	
	No. of Responses	**% of Responses**	**No. of Responses**	**% of Responses**	**No. of Responses**	**% of Responses**
All responses	185	100%	129	100%	30	100%
No internet	9	5%	5	4%	1	3%
ISP is Telus	126	68%	86	67%	22	73%
ISP in Xplornet	34	18%	27	21%	5	17%
Employ tethering	12	6%	9	7%	1	3%
Satisfied with Service	49	26%	39	30%	6	17%

Telus ASDL is the predominant source of the internet for Islanders, with some variety for the balance. Of the 185 survey responses, 87 percent access the internet from Telus (126 responses)

and Xplornet (34 responses). Twelve tether their cellphones, while others use cellphones as their only means of access.

Nine respondents (5 percent of all respondents), do not access the internet. Five of these report that no Telus is available to them, four say they would buy better service if it available, and three say the price is too high.

Forty-nine respondents indicated they are satisfied with their internet service, and of these, 84 percent access the internet through Telus (39) or Xplornet (6).

Seniors and Satisfaction

A less clear finding is that <u>Denman seniors use the internet but they have mixed views about how satisfactory it is.</u>

Seventy percent of all responses to the survey came from 129 households that have seniors present. These included 86 respondents who access the internet using Telus and 27 who use Xplornet. Nine others tether their cellphones, three just use cellphones for internet access, while one "camps out" on a neighbouring household's network.

Five responses came from seniors households that do not use the internet. Three of these have no Telus available, three would buy better service if it was available, and three find the price too high.

Thirty of the seniors who responded were satisfied with the internet (23%), and they comprised 61 percent of all Islanders who indicated satisfaction. Among these satisfied seniors, nearly one-third (9 respondents) would buy better service if it was available, and nearly one-quarter (7 respondents) consider the price is too high.

The survey found that 49 of the responding seniors (40%) consider the speed[6] or capacity of their internet inadequate for enjoyment. These views concerning inadequacy were quite consistent with seniors' views about whether their internet service is satisfactory, as only two of the 49 respondents said both that their internet is inadequate for enjoyment and that it is satisfactory.

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[6] Internet speed will be discussed further, below.

It is hypothesized that seniors use the internet for enjoyment, perhaps to view Netflix or YouTube, or Skype with family members and friends. Netflix recommends a minimum speed of 3 Mbps[7] for streaming video, and 5 Mbps for high definition video. While most seniors households did not report inadequate speeds (80 of 129 households) the following chart illustrates that nearly one-quarter of their speed test reports were below the Netflix guideline for reception, and 36 percent of all seniors reported speeds that were inadequate to view high definition video.

Seniors' Internet Test Results, by Speed Category

Number of Results

Speed Category	Number of Results
<3	80
3.1 - 5	46
5.1 - 15	153
15.1 - 25	44
>25.1	20

■ Speed Categories (in Mbps)
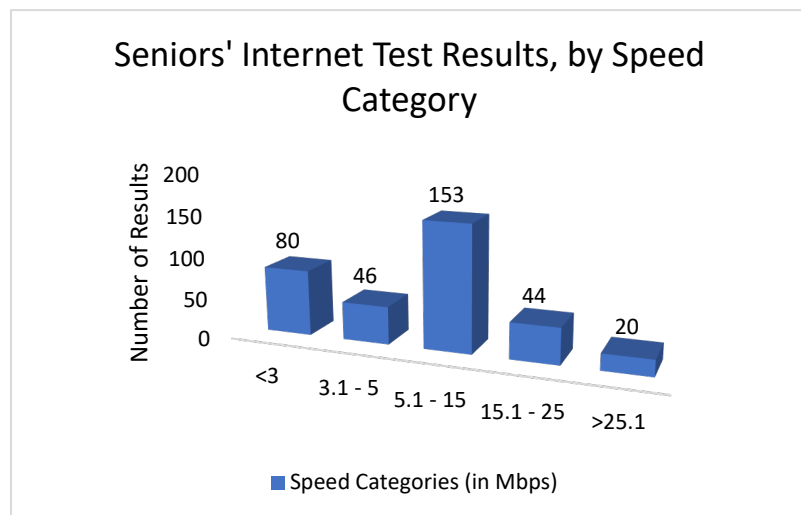
Thirty-four seniors households (26%) report that the internet speed was inadequate at certain times or certain days. These households included 14 who also reported their internet was inadequate for enjoyment. Two of the seniors households reported the temporal problems with the internet, but also indicated they are satisfied with their service.

A check at the Denman Seniors' Centre found download speeds of 7.6 Mbps[8] in the Lounge area, and 1.9 and 1.7 Mbps in the upper and lower gyms, respectively.

It may be concluded that seniors have mixed views about their internet service, with the majority finding it is inadequate. Some seniors were satisfied with their internet even though they had relatively low average download speeds.

School-age Children and Internet Adequacy

Denman's school-age children need to have access to good internet. The survey found, of the 30 households that have children present, 29 use the internet but only six of these reported they are satisfied with it. Nine indicated they have temporal issues with their internet service. Sixteen (53%)

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[7] Mbps is the abbreviation of megabits per second. Downloading is data coming from the internet to the user. Uploads travel from the user to the internet.
[8] Mbps is the abbreviation of megabits per second. Downloading is data coming from the internet to the user. Uploads travel from the user to the internet.

said they would buy better service if it was available, and five said they would consider leaving Denman because of internet inadequacy. Five reported that Telus was not available to them, and three of these respondents use Xplornet.

Average Internet Download Speeds
Households with Children

Chart shows bars for TELUS, XPLORNET, and OTHER with a vertical axis scale of 0, 5, 10.

Legend:
- ■ Average Internet Download Speed (Mbps) <6
- ■ Average Internet Download Speed (Mbps) 6 - 15
- ■ Average Internet Download Speed (Mbps) >15
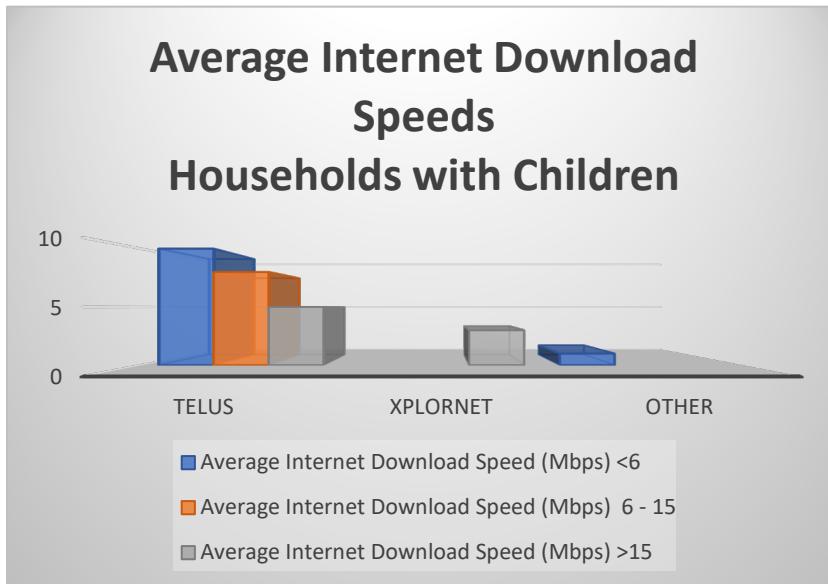
Twenty-eight of the households with children reported their internet speed tests, and 11 of them (39%) had average download speeds under 6 Mbps. A test of download speed at Denman Community School (in the CAPS facility) found a speed of 9.6 Mbps, while the nearby Denman Library was slightly higher at 10.3 Mbps.

The survey suggests that, with the exception of Xplornet, Denman's internet service may be weak in relation to its capacity to support children's education.

Inadequacy for Business

The survey found Denman's businesses (SMEs) consider the internet service has significant inadequacies. Forty-four respondents said the internet is inadequate to conduct their business, and of these, thirty-three said their business or interest in Denman would improve with better internet. None of them indicated they are satisfied with their internet service. Seven of these respondents indicated the poor internet makes them consider leaving Denman. The internet services used by the business respondents were Telus (27), Xplornet (10) and tethering (6).

It is interesting to observe the internet speeds associated with these unsatisfied business interests. Thirty-eight of the respondents who said their internet is inadequate for business, reported their speeds. The average speed they reported, after three downloads, was 8.7 Mbps. Nineteen of them had average speeds below 6.0 Mbps. The sub-6.0 Mbps speeds were from Telus (16) and tethering (3).

It seems clear that <u>internet services are inhibiting Denman Island's businesses, particularly the internet provided by Telus or by tethering</u>.

Inadequacy for Seasonal Residents

Nineteen households indicated they are primarily seasonal residents. Seven of these households had seniors present, and of these, three had school-age children. Fifteen of the households access the internet, while three responded that they don't, and one didn't respond.

A higher proportion of seasonal households than fulltime residents use informal methods to access the internet. While eight seasonals use Telus and one uses Xplornet, four tether their cellphones and one just uses a cellphone for browsing. One accesses the internet at a nearby property. Two of the households that were tethering their cellphones said that Telus was not available to them.

The seasonal households that use the internet are not satisfied with it. Eight report that if faster internet were available they would acquire it (53% of users). Four report their internet is inadequate for their enjoyment, and two find it inadequate for their business. Three report their enjoyment or business would improve with better internet. Four said the price is too high. Four households indicated that they are satisfied.

The three seasonal households that don't use the internet include two who said they would sign up if faster services were available. One said the price is too high.

It is clear that <u>seasonal residents find a lot of shortcomings with the internet</u> on Denman Island.

The Price Question

The second most common opinion revealed by survey responses is that <u>the price of internet services is too high</u>. Fifty-nine respondents reported this, about one of every three respondents (see table overleaf).

This proportion is quite consistent among the various groups of respondents identified in the survey. Households with children, and households using Xplornet, have slightly higher proportions of reporting "too high prices" (40% and 47% respectively). The group of households that access the internet by other means, mainly by tethering, has a slightly lower proportion reporting high prices (23%).

| Survey Respondents Reporting the Internet Price is Too High					
Groupings of Respondents	**All Respondents**		**Respondents Reporting Prices Too High**		
	No.	*% of All*	*No.*	*% of All*	*% of Class*
All Respondents	185	*100%*	59	*32%*	*32%*
Seniors Present	129	*70%*	40	*22%*	*31%*
Children Present	30	*16%*	12	*6%*	*40%*
Primarily Seasonal	19	*10%*	6	*3%*	*32%*
Satisfied with Internet	49	*26%*	13	*7%*	*27%*
Would Buy If Better	96	*52%*	31	*17%*	*32%*
ISP is Telus	127	*69%*	35	*19%*	*28%*
ISP is Xplornet	34	*18%*	16	*9%*	*47%*
Other Internet Access	17	*9%*	4	*2%*	*23%*
Don't Use Internet	9	*5%*	3	*2%*	*33%*

The survey doesn't afford much additional examination of the meaning of this widespread view about high prices. The consistency of the proportions, and the higher price sensitivity expressed by households with children, and households using Xplornet, all suggest that the "price too high" judgements are well-considered opinions within the Denman community. However, it is also noteworthy that one-half of all respondents to the survey said they would buy faster internet if it was available, and one-third of these respondents are the same households who report the present price is too high.

Inadequacy for Enjoyment

The opinion expressed most commonly by survey respondents is that <u>the internet speed or capacity is inadequate for their enjoyment</u>. Seventy-three (39% of all respondents) expressed this view, and 34 of these respondents also reported the internet is inadequate for their business. Thirty-nine of these respondents (53% of them) said their interest or business would improve with better internet, and 43 (59% of them) said if it was available they would acquire better internet.

Two factors that were covered in the survey may aid in understanding why so many users find their enjoyment impeded. Twenty-two respondents, thirty percent of those who weren't enjoying their internet, said the problems occur at certain times, and certain days.

The following chart provides some insight into what causes these temporal problems. It shows the distribution among three speed categories, of the averaged data from sixty-five respondents who reported their internet speed tests.
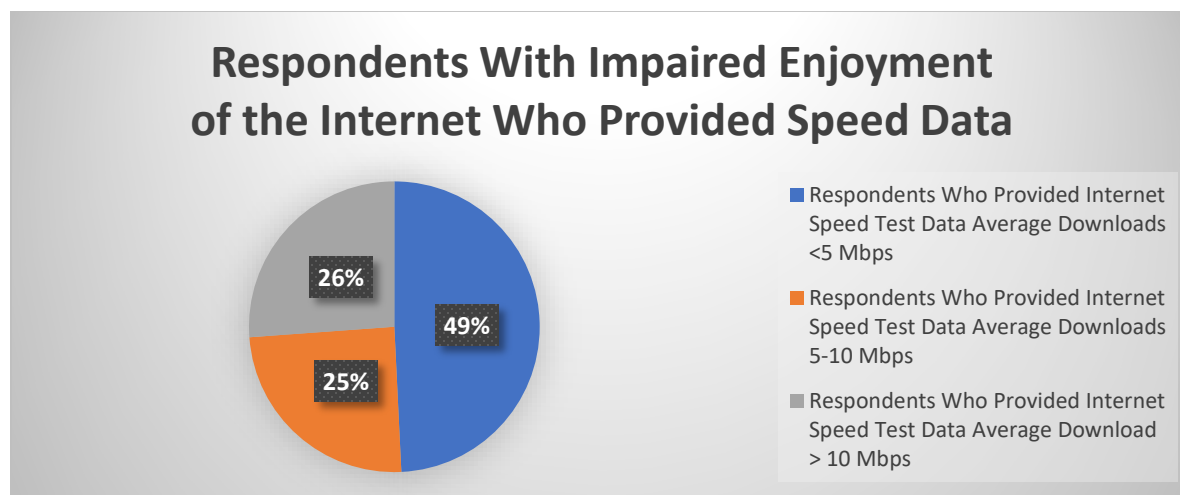
Three-quarters of these respondents had average download speeds under 10 Mbps, and one half of them had speeds below 5 Mbps. Slow internet speeds result in interruptions in the transmission of larger data files including images, in video data such as Netflix and YouTube, in live streaming and in games – all examples that would impair enjoyment of the internet.

Internet Speed

This section of the report conveys the survey findings about a complicated subject, internet speed.

The federal agency responsible for regulation of the internet in Canada, the Canadian Radio Television Commission (CRTC), publishes information for consumers about the use of the internet and internet standards[9]. It advises that internet speeds are affected by many factors, both within and outside the home. Inside factors include the modem, the router, the number of devices being used

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[9] Information summarized from CRTC website at https://crtc.gc.ca/eng/internet/performance.htm.

(computers, tablets, cellphones on Wi-Fi settings), the distance and materials between the router and the device being used, and the speed of the device being used (older devices are usually slower). Outside factors include the house connection to ISP services, the quality of the ISP service at that location, and the traffic on the website being accessed. Internet speeds found by users are the outcome of all of these factors, as well as the capabilities of the test that produced the speed finding.

Denman Islanders should be aware that in December 2016 the CRTC issued a regulatory target as follows:

> *In 2015, 82% of Canadians had access to speeds of 50 Mbps download/10 Mbps upload for fixed broadband services. We recognize that a well-developed broadband infrastructure is essential for Canadians to participate in the digital economy. That is why we set new targets for Internet speeds. We want all Canadian homes and businesses to have access to broadband Internet speeds of at least 50 Mbps for downloads and 10 Mbps for uploads.*
>
> *While most Canadians today have access to these minimum service levels, many rural and remote regions in Canada lack the infrastructure needed. As part of its effort to support such an infrastructure, we are setting up a fund to help ensure minimum service levels for broadband Internet access across Canada. By the end of 2021, we expect 90% of Canadian homes and businesses will have access to broadband speeds of at least 50 Mbps for downloads and 10 Mbps for uploads.*

This CRTC statement demonstrates what experts view to be reasonable, necessary internet targets. It also attests that regulators understand that rural infrastructure needs improvement to reach these levels.

Our survey asked respondents to report their internet speed using a particular speed test, the "Combined" test at www.testmy.net. This is one of many good tests available, and it had the useful feature of immediately providing users with contextual information about their test scores. Using one test has the advantage of producing consistent information, suitable for comparison. The speed testing in the survey provides comparative information about a lot of Denman internet users, and affords some understanding of relative speeds and trends on the Island.

The survey asked respondents to perform and report on three tests of internet speed, with each test covering both downloads and uploads. The examinations that follow only concern the download results, that is, the speeds at which data is delivered from the internet to users on Denman Island. Ignoring the uploads makes the examinations more manageable, and is the conventional manner of considering speed.

Download Speeds Reported in Denman Survey
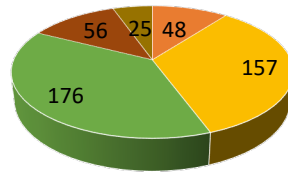
- Speed Test By Range 0-1 Mbps
- Speed Test By Range 1.1-6 Mbps
- Speed Test By Range 6.1-15 Mbps
- Speed Test By Range 15.1-25 Mbps
- Speed Test By Range 25.1+ Mbps

This chart illustrates the distribution of 462 download speed test results, among five classes of download speeds.

While most of the results were above 6 Mbps, there were 205 of 462 tests (44%) at a lower level of service. The average speed of the 157 reports between 1.1Mbps and 6 Mbps was 3.57 Mbps, which is enough for a standard Netflix video, but not adequate for a high definition video. There were 176 results (38%) between 6.1 and 15 Mbps, and 56 results (12%) between 15.1 and 25 Mbps. Taken together, 95 percent of the internet tests on Denman Island were below 25 Mbps, which is less than one-half of the CRTC target speed for Canada.

Speed and Temporal Inadequacy

The survey found that 52 respondents, 28 percent of all respondents, found the internet inadequate at some times, and some days.

The large number of speed readings, taken by many households over about a month, affords the ability to look at these temporal aspects of the internet service. The table below reports the 447 internet speed test results that identified the day of the week that they were obtained. There is day to day variation in the number of speed tests performed. From Sundays to Thursdays inclusive there were 40-64 reports daily, while on Fridays and Saturdays there were 101 and 90 reports, respectively. This pattern of distribution is generally consistent within the five download speed ranges. The proportions in the higher download speeds are slightly greater on Fridays and Saturdays than on other days. Whereas many survey respondents found temporal problems in their internet service, the survey does not reveal a daily inadequacy.

Internet Speeds Reported by Speed Range and Day of Week							
Speed Ranges	**Weekdays**						
	Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**	**Saturday**	**Sunday**
< 1 Mbps	4	3	7	8	13	7	5
1.1 – 6 Mbps	13	20	17	26	30	29	12
6.1 – 15 Mbps	16	21	15	22	40	33	25
15.1 – 25 Mbps	6	5	13	4	12	8	8
> 25.1 Mbps	1	1	0	4	6	13	
Subtotals	40	50	52	64	101	90	50

The second table, below, provides insight into the "time of day" aspect of the temporal inadequacy issue. It shows the distribution of the 419 speed test results that identified the time when the test was carried out, with time organized into five groups.

Internet Speeds Reported by Speed Range and Time of Day					
Speed Ranges	**Time Periods During Day**				
	06:01- 11:00 (morning)	**11:01 - 14:00 (noon)**	**14:01 - 17:00 (afternoon)**	**17:01 - 22:00 (evening)**	**22:01 -06:00 (night)**
< 1 Mbps	19	8	6	11	3
1.1 – 6 Mbps	48	29	26	29	5
6.1 – 15 Mbps	43	30	30	50	8
15.1 – 25 Mbps	17	7	4	16	6
> 25.1 Mbps	7	4	5	8	0
Subtotals	134	78	71	114	22

Fifty-nine percent of all test reports (248 reports) come from two five-hour periods, morning and evening. During the morning sixty-seven reports are from the lowest speed classes (below 1.0 Mbps, and 1.1-6 Mbps). This is a notably greater number, and proportion of low speed than occurs in any other time period. During the evening there were 40 reports from the two lower speed ranges. It appears that during the periods when the number of internet users is high (mornings and evenings), there is a disproportionate rise in low speed test results. That relationship would cause users whose speed drops, to consider their internet inadequate at those times.

Speed and Geography

The survey provided some rough geographic information about the distribution of internet speeds across Denman Island. The table overleaf shows, for six classes of internet speeds below 6.0 Mbps, the streets where speeds within these ranges were reported. The table does not show all speeds reported on these streets, just the streets where all sub 6.0 Mbps speed tests were reported.

Listing of Streets Where Internet Speeds <6.0 Were Reported					
Speed Ranges					
<1 Mbps	1.1-2.0 Mbps	2.1 -3.0 Mbps	3.1-4.0 Mbps	4.1-5.0 Mbps	5.1-6.0 Mbps
Baikie	Baikie				
	Chrisman Rd		Chrisman Rd		
			Cokley Rd	Cokley Rd	
Corrigal Rd		Corrigal Rd		Corrigal Rd	Corrigal Rd
Crescent					
Dalziel Rd		Dalziel Rd	Dalziel Rd		Dalziel Rd
Denman Rd	Denman Rd	Denman Rd		Denman Rd	
Dusty Road	Dusty Road	Dusty Road			
Eaglecrest Rd	Eaglecrest Rd	Eaglecrest Rd	Eaglecrest Rd		
East Rd	East Rd		East Rd	East Rd	East Rd
				Greenhill Rd	Greenhill Rd
				Hilberry Lane	Hilberry Lane
				Jemima Rd	Jemima Rd
			Keith Wagner Way	Keith Wagner Way	Keith Wagner Way
					Kelsey Rd
Lacon Rd	Lacon Rd	Lacon Rd	Lacon Rd	Lacon Rd	Lacon Rd
Lake Road		Lake Road	Lake Road		
					Marcus Rd.
					McFarlane Rd
		Nixon Rd	Nixon Rd		Nixon Rd
Northwest Rd	Northwest Rd	Northwest Rd	Northwest Rd	Northwest Rd	Northwest Rd
		Owl Crescent	Owl Crescent		
					Park
Reginald	Reginald	Reginald	Reginald		
Schmidt Rd		Schmidt Rd	Schmidt Rd		
Scott Rd			Scott Rd	Scott Rd	
Swan Rd	Swan Rd	Swan Rd	Swan Rd		
				Triple Rock Rd	Triple Rock Rd
				Trueman	
	Wren	Wren			

There are a four recognizable geographic patterns in this table. For instance, the sector of East Road (northern end), Corrigal, Marcus, Jemima is not served by Telus. Telus service is also minimal to unavailable in much of the area south of Fillongley Park (Balkie, Dalziel, Schmidt, Swan). Telus service is weak at the southern end of Lacon Road, including Dusty and Reginald. It is also weak towards the northern end of the island (Northwest, Lake, Wren, Nixon, Scott, Chrisman).

There is a relationship between these patterns of low speed, and characteristics of Telus' ASDL service. Telus internet service speeds reduce with distance from its two Central Offices (COs). These COs are located on Kirk Road, and at the corner of East Road and McFarlane Road.

There is clearly a <u>weakness in the availability of adequate speeds in internet service to particular parts of the Island.</u>

Service Providers

This final section conveys information about the internet service providers serving Denman Island.

Telus   The Island's predominant ISP is Telus, which has a valuable but dated ASDL service network that evolved out of its wired telephone facilities and previous generation of cable television infrastructure.

Telus service arrives on Denman via fibre-optic cable near the Denman West ferry. The fibre goes to Telus' CO on Kirk Road, then continues out along two routes. One goes out Lacon Road and across McFarlane to Telus's other CO at the corner of McFarlane and East Road. The other fibre optic cable goes across Denman Road to Cable Beach, where it crosses Lambert Channel to bring internet to Hornby Island. In the COs, the fibre-optic cable is connected, by means of ports, to cables that run out to distribute service to customers. Each customer connects to a port in the CO through a pair of twisted copper wires, contained within the cables. The quality of internet services declines with distance from the CO, with 5 kms being the approximate limit for service. To account for the resulting variations in the speeds it can provide, Telus undertakes with individual customers to provide service at one of

the following speed levels: 1 Mbps, 6 Mbps, 15 Mbps and 25 Mbps. Its prices are approximately as follows[10]:

- For service up to 15 Mbps, the charge is $71 per month, with the first 3 months at $55 for term contracts, the first 6 months at $50 for a 2-year contract;
- For service up to 25 Mbps, where available, $76 per month;
- For service above 50 Mbps, where available, $80 per month.

Xplornet   Xplornet provides rural internet service across Canada, and is the only satellite internet provider that was identified in the survey[11]. It mounts its dish on a customer's property, facing the southern sky, providing service at prices approximately as follows[12]:

- For up to 10 GB of data, speed up to 5 Mbps, $50 per month;
- For up to 20 GB of data, speed up to 5 Mbps, $60 per month;
- For up to 50 GB of data, speed up to 10 Mbps, $80 per month;
- For up to 300 GB of data, speed up to 25 Mbps, $120 per month (with a $20 per month discount for the first 12 months)

Survey Data About These ISPs

The survey found some differences in Denman Islanders' use and opinions about the two main ISPs (see following table). Overall, the survey indicates that over two-thirds use Telus and just less than twenty percent use Xplornet.

Comparison of the shares each ISP received for each particular "Type of Data", with that ISP's overall shares of the completed questionnaires, reveals whether the ISP has a notable characteristic on Denman. To illustrate, both ISPs have shares of two Types of Data, "households with seniors" and "households with children", that are very close to their overall shares of Denman households, so these are not notable. Both ISPs have lower proportions of the seasonal residents than their overall shares of the Island's internet, so this reveals that seasonal residents are more likely to avoid these ISPs

when accessing the internet. Telus received more than its share of households that consider it inadequate on certain days or times of the day, and people who would consider leaving because of internet inadequacies, so these stand out as negative

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[10] This pricing information was provided by a Telus sales agent on a generalized basis, for illustrative purposes. Actual price quotations are only made for individual locations.
[11] Other Canadian or even global satellite internet providers may also be in use, such as Bell or Shaw, but none were reported in the survey.
[12] Pricing information from Xplornet website at https://www.xplornet.com/shop/our-internet-packages/.

characteristics. On the positive side, Telus users reported less than its share of households that feel better internet would improve their enjoyment or business, and of households that said they would acquire better internet if it was available. Xplornet's negative characteristics are that it received more than its share of households that said it was inadequate for enjoyment, and those that said its price is too high. In terms of user satisfaction, Telus received more than its share, and Xplornet received less than its share.

Comparison of Telus and Xplornet as Seen in Denman Survey						
Type of Data	**Telus**		**Xplornet**		**All Responses**	
	No.	***% of All***	**No.**	***% of All***	**No.**	***% of All***
Households that completed questionnaires	127	*69%*	34	*18%*	185	*100%*
Households having seniors present	86	*67%*	27	*21%*	129	*100%*
Households having school-age children present	22	*73%*	5	*17%*	30	*100%*
Seasonal residents	8	*42%*	1	*5%*	19	*100%*
Telus not available			15	*54%*	28	*100%*
Internet inadequate for enjoyment	44	*60%*	20	*27%*	73	*100%*
Internet inadequate for business	27	*61%*	10	*23%*	44	*100%*
Internet inadequate at certain times, some days	38	*73%*	10	*19%*	52	*100%*
Internet price too high	35	*59%*	16	*26%*	59	*100%*
Internet makes household consider leaving Denman	11	*73%*			15	*100%*
Better internet would improve enjoyment or business	37	*58%*	16	*25%*	64	*100%*
Would acquire better internet, if available	57	*58%*	25	*25%*	98	*100%*
Satisfied with internet	41	*80%*	6	*12%*	49	*100%*

Finally, this chart shows the results of the speed tests reported by Denman

users, organized as five classes of download speed, and grouped by ISP. It also includes the few results from people who tether their cellphones. Most Telus users are in the lower speed ranges, while Xplornet users are primarily at higher speeds. This is not surprising, as the pattern of Telus users' speeds mainly reflects the fact

Download Speed Test Results, by ISP and Speed Ranges

	<1 MBPS	1.1-6.0 MBPS	67.1 -15.0 MBPS	15.1-25.0 MBPS	>25.1 MBPS
Telus	14	44	49	11	1
Explornet			15	7	8
Tethering	1	1	1	2	1

that most users are located some distance from the COs, so they cannot acquire the higher speed service. Xplornet users have their choice of speeds, so the chart merely demonstrates their choices.
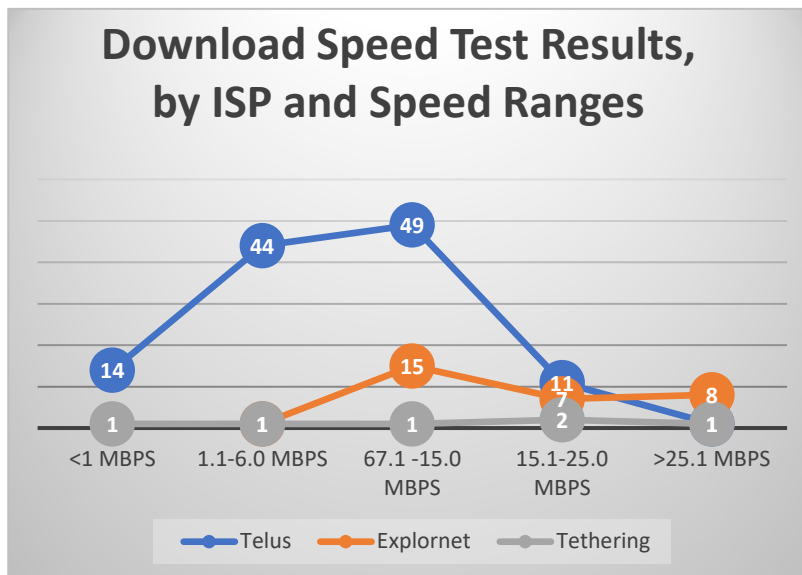
Summary of Findings

This report has provided information about the internet services received on Denman Island, and Islanders' views about many aspects of this service.

Denman has particular needs for internet services. It is growing quickly and has key population groups that, for different reasons, require good quality, reliable internet (seniors, school-age children, businesses). Also, seasonal residents are an important component of Denman's economy, and good internet is vital to attracting these people.

In August, the new Denman Island Internet Committee conducted a survey to learn what internet services are received here and what Islanders think about the service. The survey closed after Labour Day with 185 completed questionnaires, and examination of this response found it constitutes a random sample, representative of the Island.

The internet is widely used on Denman. Of the 185 survey responses, 87 percent access the internet from Telus (126 responses) and Xplornet (34 responses). Twelve tether their cellphones, while others use cellphones as their only means of access. Perhaps 5% of Islanders do not use the internet.

The dominant provider, Telus, distributes its service via twisted copper pairs in cables coming from two central offices (located on Kirk at Northwest, and on East at McFarlane). The greater the distance between an internet users' house and one of these offices, the slower their internet service. At a distance of about 5 kms, no reliable service occurs. Also, there are service gaps in Telus' distribution, notably: (1) the East/Corrigal/Jemima area; (2) south of Fillongley (Balkie/Dalziel/Swan/Schmidt); (3) Northern Denman (Komas); and (4) Southwestern Denman (Lacon/Reginald/Dusty).

The satellite service provided by Xplornet can usually locate anywhere, but it can be blocked by terrain or heavily forested areas. People can tether computers to cellphones to access the internet, but this requires a strong cellular signals (which are scarce on Denman), and the user must have an adequate and affordable data plan (which is not common among cellphone users).

Availability notwithstanding, significant problems were found with internet service on Denman.

- Nearly 40% of all respondents indicated their internet speed or capacity is inadequate for their enjoyment, and one-half of these respondents also said it is inadequate for their business.
- 33 respondents said their enjoyment or business would improve with better internet.
- One-half of the 19 seasonal residents who responded said if better internet was available they would acquire it, and one-third of them reported their internet was inadequate for either their enjoyment or their business.
- Seniors' views about their internet service were varied, with one-quarter reporting satisfaction, one quarter finding their service inadequate at certain times, and one in six reporting it is inadequate for their enjoyment.
- About one-half of the 30 responding households that had school-age children, said they would acquire better internet if it was available, and about one-third said it is inadequate at certain times. Five of the households said they would consider leaving Denman because of the internet.
- 32% of respondents said the price of the internet is too high.

Notwithstanding these problems, it is also notable that nearly one in three respondents indicated they are satisfied with their internet services.

The speed of internet services on Denman Island is far below the service received by most Canadians. The federal agency that regulates internet in Canada, the CRTC, has established a target that all Canadians have access to broadband internet speeds of at least 50 Mbps for downloads and 10 Mbps for uploads, by the end of 2021. It states that 82% of Canadians were obtaining these levels in 2015. Ninety-five percent of the 462 speed tests reported in the Denman survey were below 25 Mbps, and that is only one-half of the national standard. Fifty-four percent of

Denman speeds were below 6 Mbps. Examination of the speeds reported at different times of the day showed that during periods when the number of internet users is high, there is a disproportionate rise in the low-speed test results. The geographic distribution of the lower speed results was examined, and four areas of lower speed were observed, matching the Telus service gaps described above.

Some comparisons were made, of survey findings in relation to the two main ISPs. This did not produce findings, other than to observe that the services provided by these two firms have different characteristics.

The information gathered from this survey should be valuable to Denman Island as it begins conversation with service providers and regulators in seeking to improve internet services.

Addendum

(13 months later)

Denman Island Internet Survey

Denman Island Internet Committee

November 21, 2019

Summary

The 13 responses by Denman households to the recent HICEEC online internet survey added somewhat to the findings of the Denman survey conducted in 2018.

The total survey response from Denman was increased to 198 (34% of all households).

Some additional information was obtained:

- There is an overwhelming preference for a fibre-optic option to improve the internet;
- There is an interest in keeping the user charges to the $60-$90 per month range; and
- There is an understanding that weak connectivity limits the quality of life in the community.

Introduction

During the period September 15 - November 15, 2019, the Hornby Island Community Economic Enhancement Corporation (HICEEC) conducted a 14-question online survey of internet services which produced thirteen responses from Denman Island residents. These responses are additions to the August-September 2018 survey on Denman Island (survey findings published October 8, 2018).

This Addendum provides summary information from the thirteen added responses, highlighting new findings. The structure of the Addendum follows the order of the 14 questions posed in the HICEEC survey questionnaire.

Total Sample

The additional responses add to the strength of the survey response, bringing the total response to 198, which is 34 percent of all Denman households.

Distribution of Responses (Q3)

The additional responses came mainly from the east side of Denman Island. Streets included were Denman (2), East (4), Fillongley (2), Hilberry, Lacon, McFarlane, Owl, Schmidt and Yule. This adds two streets to bring the total geographic coverage of survey responses to 39 different roads, almost all the roads on Denman Island.

Household Types (Q4)(Q7)

The new responses included 11 year-around residences, 2 seasonal residences and a home business. This information is not fully additive to the original survey as the latter did not ask respondents specifically whether they were a business, or a home business. The composition of the households was similar to that found in the original survey.

COMPOSITION OF HOUSEHOLDS FOUND IN ADDITIONAL SURVEY RESPONSES		
Household Members by Type	**Responses**	
	Number	**% of Total**
Residents		
School-age children (3-18 yrs)	2	12%
Young adults (19-25 yrs)		
Adults (26-64 yrs)	6	35%
Seniors (65+ yrs)	6	35%
ST	**14**	**82%**
Frequent Visitors		
School-age children (3-18 yrs)		
Young adults (19-25 yrs)	1	6%
Adults (26-64 yrs)	2	12%
Seniors (65+ yrs)		
ST	**3**	**18%**
TOTALS	**17**	**100%**

Sources of Internet (Q5)

The sources of internet were similar to those found in the original survey. The Xplornet users supplied a slightly higher proportion of these respondents' internet, and there were fewer SmartHub users. Both of these findings are reflective of the respondents' dominant location on the east side of Denman, where Telus' services are weaker.

SOURCES OF INTERNET (ISPs) FOUND IN ADDITIONAL SURVEY RESPONSES		
Internet Provided By	**Responses**	
	Number	**% of Total**
Telus	8	61%
Xplornet	4	31%
SmartHub	1	8%
ST	**13**	**100%**
No Telus Available	2	

Use of the Internet (Q6)

The Hornby survey questionnaire improved on the original Denman survey by asking how respondents use the internet. The following table shows usage by the 13 Denman respondents:

USES OF THE INTERNET FOUND IN ADDITIONAL SURVEY RESPONSES		
Uses	**Responses**	
	Number	**% of Responses**
Basic uses (email, texting, browsing, Facetime/Skype)	13	100%
Streaming (Netflix etc, sports, gaming, news/documentary/events/conferences	7	54%
Basic business (till and billing, bookkeeping, credit cards, accounting, banking, inventory, research, ordering, sales, promotion/advertising	6	46%
Interactive learning (teleconferences, group modelling, data base projects, interactive gaming)	5	38%
Educational access (home school, post-secondary, distance learning courses, work-related courses)	3	23%
Advanced business (data base modelling, digital graphics, multi-media collaborations)	2	15%
Medical (health monitoring, online diagnosis, treatment)	0	
Household mechanics (smart electronics, controls, monitoring, security)	0	
TOTAL	**36**	

Nearly one-half of respondents employ the internet for basic business, while 15 percent use it for more advanced business functions. There are indications it is widely used for education (23 percent using it for educational access, 38 percent using it for interactive learning).

Satisfaction With the Internet (Q11)

As seen in the original survey, most Denmaners are not satisfied with their internet service. The 13 added responses were:

- Not satisfied with my internet service   10 (77%)
- Satisfied with my internet service now   2 (15%)
- Satisfied for the foreseeable future   1 (8%)

The Inadequacy of the Internet (Q12)

The Hornby survey asked about the specific impacts of the inadequacy of their internet. These responses provide direct evidence of what is meant when respondents describe the internet as being inadequate.

FUNCTIONS AND ACTIVITIES THE PRESENT INTERNET IS INADQUATE FOR, BECAUSE OF SPEED/CAPACITY/RELIABILITY		
Functions/Activities Where Internet is Inadequate	**Responses**	
	Number	**% of Responses**
My enjoyment/entertainment	11	85%
My learning/education functions	8	61%
My household's functions (smart equipment, security)	4	31%
Reducing the cost of travel, by accessing services via the internet	4	31%
Reducing my carbon footprint from travelling to access services, in a vehicle, and on the ferry (or ferries)	4	31%
Connecting with my community, alleviating isolation	4	31%
Safety and accessing emergency services into the future	3	23%
My business functions	3	23%
Attracting young families	3	23%
My desire to live here for the long term	2	15%
Accessing healthcare services	1	8%
TOTAL	**47**	

The most common "inadequacy" is fact that poor internet limits enjoyment and entertainment. Perhaps more importantly, nearly two-thirds of respondents observed that it weakens their learning and education. One-third of respondents observed problems in connecting with the community, reducing carbon footprint and money spent on travel, and employing smart equipment. About one in four identified that weak internet makes it difficult: to attract young families to our islands; to perform business functions; and increasingly, that it will limit safety and access to emergency services. These detailed responses, and the frequencies of the responses, demonstrate the communities' interest in achieving better quality of life through improved connectivity.

Pricing and the Internet (Q9, Q10)

The Hornby questionnaire yielded some insight into people's thoughts about the pricing of connectivity. As seen in the table below, most respondents would like to keep their internet payments in the $60 - $90 per month range. The responses provide slight, but only slight, evidence that some respondents would pay more for better service.

PRICING AND THE INTERNET				
Price Range (per month)	**Paying at Present**		**Would Pay for Fast, Reliable, High Capacity Internet**	
	Number of Responses	**% of All Responses**	**Number of Responses**	**% of All Responses**
Less than $60	2	20%	2	15%
Between $60 - $90	5	50%	7	54%
Between $90 - $120	3	30%	3	23%
More than $120	0		1	8%
TOTAL	**10**	**100%**	**13**	**100%**

How Should the Internet Be Improved (Q13)

The Hornby questionnaire asked respondents to select their preference between four descriptions of possible methods of improving their internet. Twelve of the thirteen Denman respondents answered this question, and one of these respondents selected two options, so a total of 13 options were selected by twelve respondents.

The overwhelming choice, made by 85 percent of respondents, was as follows:

> *"the principal solution for the islands should be to secure universal "fibre to the home". A fibre optic (glass) cable emits no radiation, will last for decades, and can always be kept up to date. In opting for this solution, it is recognized that it may have a higher minimum cost, and may be unavailable or have added costs for homes in the more remote locations, or homes with very long driveways."*

A different option was selected by three respondents. One respondent preferred "*Any source of internet with speeds of at least 25 Mbps*". One selected a wireless-based service with towers of varying heights. One selected a hybrid option with fibre where financially and physically possible, and with wireless, copper wire and satellite-based service as other sources.

Summary

The 13 responses by Denman households to the recent HICEEC online internet survey added somewhat to the findings of the Denman survey conducted in 2018.

The total survey response from Denman was increased to 198 (34% of all households).

APPENDIX B
HORNBY ISLAND SURVEY

Baylink Networks

&

Hornby Island Community Economic Enhancement Corporation

November 13, 2019

Introduction

The Hornby Island survey was designed as a universal study of Hornby Island's digital connectivity situation. After development, consultation, and pre-testing, the survey was launched September 26, 2019. When the survey closed on November 12th, 229 completed questionnaires had been accumulated.

Coverage of Hornby's Survey Response

This section examines the representativeness of the response to the survey. The survey was designed to be universally available and appealing so people would be encouraged to respond to it.

- It was comprised of only 14 questions.
- The first was whether the service was on Denman or Hornby, in order to allow both islands to use the survey, if desired. Of the 244 surveys received, 229 were from Hornby and only those were considered in the analysis. Information from the Denman responses was provided to the DIIC.
- Use and satisfaction questions were developed for information on needs and aspirations.
- A speed test was requested, but not mandatory, and an app. to use for the test was recommended.
- Providing contact information was an optional field
- An address, or neighbourhood description, was requested in order to assure a wide geographic representation was included in the results
- Respondents were asked to identify whether they were full time residents, or seasonal residents, in order to assess uptake on a future economic model.
- Business usage was isolated in order to review the economic impact of inadequate internet service.
- Demographic questions were used to identify respondents by age, family status, interests and needs.
- The survey allowed only one response from each I.P. address, so that households would be singularly represented.
- The administration of the survey was aimed to reach the entire population. Paper copies were made available at the "Free Post", with the easier to complete digital copy online. The website link to the survey was widely advertised in flyers and newspapers, and on the Hornby Community Connections Facebook page (over 1600 members). Delegates also attended Island meetings, influencers in the community were asked to spread the word, sandwich boards were strategically placed for attention.
- No significant biases are identified in the survey design and administration that would limit it as a random representation of Hornby households.

Connectivity, Access and Satisfaction

Number of respondents 229

- Total number of households on Hornby, 2016 Census: 560
- 75% of respondents live/work on the island year-round, the other 25% have secondary homes on the island, and a principle residence in another centre.

The return of 229 completed surveys is a strong representation of Hornby's 560 private households.

- Questionnaires were received from all geographic areas on the island.
- The responses were representative of the age groups residing on the island.

    2016 Census data showed 53% of the population was over 60, and 54% of the 2019 survey respondents were seniors. 10% of the survey respondents were family households vs. 16% of the Census identified families.

- The survey had 127 respondents reporting using the internet for business purposes which corresponds to the high number of independent, self-employed people who live on Hornby. Hornby is considered a rural, remote island, without any significant major employers or industries. In the 2018 Vital Signs report done by the Comox Valley Foundation, Hornby had a poverty rate of 28.3%, the highest in the catchment area.
- Seasonal residents are vital components of Hornby's economy, adding purchasing power, support for the Arts Community, and all the service-oriented businesses. Hornby has a very seasonal, tourism-based economy. Each of these groups has particular needs for internet services that are important, particularly from the perspectives of regulatory agencies seeking to foster strong economies and equitable services, within provincial or national communities.
- It is concluded that this survey response constitutes a random sample of Hornby Island households, and a solid representation of key groups that are important from the perspective of internet regulatory policy.

What about Wireless Cell Service?

In 2015/16 Hornby residents vocally turned down a Telus tower installation on the island. There was a common concern regarding Electro Magnetic Frequencies emitted by wireless devices, and a lack of proven safety for the technology. This recent experience has created an ongoing concern in looking to the future of digital connectivity, and created the desire to bring islanders together as we looked to the future of digital capability.

Therefore, a key consideration, in this survey, was to monitor where the resident appetite currently lies regarding connectivity. A question was crafted to outline three connectivity choices:

i. The principal solution for the islands should be to secure universal "fibre to the home". A fibre optic (glass) cable emits no radiation, will last for decades, and can always be kept up to date. In opting for this solution, it is recognized that it may have a higher minimum cost, and may be unavailable or have added cost for homes in the more remote locations, or homes with very long driveways.

ii. The principal solution for the islands should be towers of varying heights, providing wireless-based service to reach all locations, costs may be lower, and it will possess greater capacity to evolve into 5G applications in the future.

iii. The principal solution for the islands should be a hybrid service employing fibre where financially and physically possible, and for other areas wireless service beamed to shoreline areas, limited copper service, private satellite service, and a minimum number of areas where service is unavailable. It is understood that this option may not meet the 50/10 Canadian standard for 100% of properties.

155 respondents, representing 71.8% of the 216 that completed this question in the survey, wanted Option 1, Fibre to the Home, despite the potential for having higher user levies.   A further 16.7% would be amenable to Option 3, which is preferably fibre but could employ a wireless strategy if it was more feasible. Option 2, the less expensive choice, was chosen by 11.6% of respondents.

By significant majority, people on Hornby are extremely concerned about the safety of wireless infrastructure, and do not want to go in that direction, even if it means better cell service and cheaper internet rates.

A vision has been developed for a Fibre to the Home project, encompassing all properties, on both islands. This will allow better cell service by way of wifi calling, and will dramatically improve the delivery of both cell and internet services.

Using Internet

The most obvious finding of the survey is that Hornby Islanders are strong users of the internet. One hundred percent of the survey respondents use the internet somehow.

Hornby's population growth has stalled, with significant challenges faced on the transportation, housing, and connectivity fronts. Connectivity has been identified as having potential to be a key economic driver, to help diversify and strengthen the Hornby economy. Key groups that require good quality, reliable internet are businesses, remote workers, institutions, transportation providers, young families, seniors, school-age children, and life-long learners. Also, seasonal residents have reported that good internet attracts them to visit more often, and to stay for longer periods of time.

Of the respondents, representing 41% of Island households, 84% of users access the internet via ADSL (copper cable) from Telus. The remainder, statistically get satellite from Xplornet, Smart Hubs from Telus cellular with line of sight service to off-island towers, or tethered cellphones offered by various providers. (although cell service is intermittent on the island).
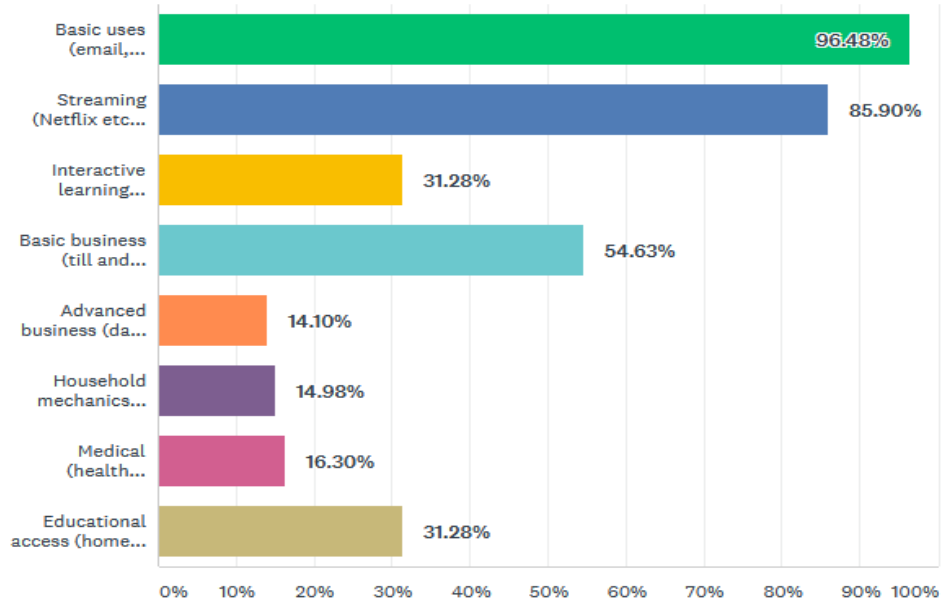
Telus service is distributed from three points which it calls Central Offices: Shingle Spit and Mount Road, the main office on Central Road near the Coop Store, and at the intersection of Central Road and Sandpiper Drive. Several residents living close to the CO's have been offered bonded wire service, which increases their service dramatically. The downside of this is that it takes two ports, which means that with growth in the population another individual may not get any service. With copper wiring infrastructure the speed of users' access   declines with distance from these offices, until no reliable service occurs at about 5 kms. This causes service gaps and increasingly poor internet, especially in two of our major subdivisions – Galleon Beach and Whaling Station Bay. Service levels further decline in the summer months, when the population increases with summer visitors.

The satellite service provided by Xplornet cannot be easily accessed everywhere, as it can be blocked by terrain or heavily forested areas. People can tether computers to cellphones to access the internet, but this requires a strong cellular signal (which is scarce on Hornby), and the user must have an adequate and affordable data plan (which is not common among cellphone users). Telus is promoting their new Smart Hub service, but only a few of the wealthier residents, living on the waterfront, are able to access service in that manner.

Availability notwithstanding, significant problems were found with internet service on Hornby. Only 6.67% of respondents indicated their internet speed or capacity is adequate for the foreseeable future. The rest are dissatisfied with the status quo in the long term. Respondents use the internet for a wide range of activities, from business to entertainment, from health to education, and everything in between.

How does your location use the internet (check all that apply)

Answered: 227   Skipped: 2

Category	Percentage
Basic uses (email,...	96.48%
Streaming (Netflix etc...	85.90%
Interactive learning...	31.28%
Basic business (till and...	54.63%
Advanced business (da...	14.10%
Household mechanics...	14.98%
Medical (health...	16.30%
Educational access (home...	31.28%

According to the CRTC, the regulator of Canada's telecoms, online November, 2019, at current Canadian standards, 85.7% percent of Canadians enjoyed a download speed of 50 Mbps and 10 Mbps for uploads.

.

BROADBAND FUND
Closing the digital divide in Canada

Whether you're at home, at work, or on the road, your phone should be able to connect using LTE, you should have an Internet connection with access to broadband speeds of at least 50 Mbps download and 10 Mbps upload and access to unlimited data.
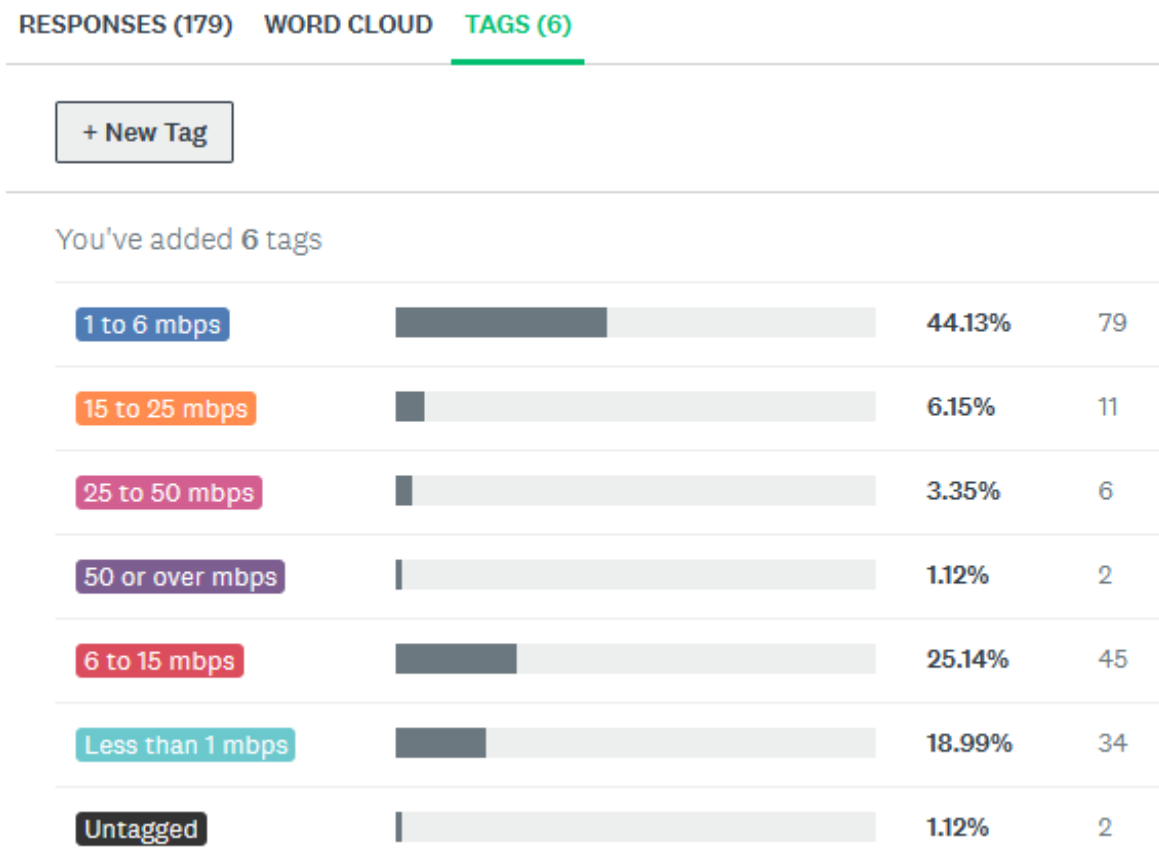
Broadband at 50/10 Mbps, unlimited

Canada
85.7%

Rural communities
40.8%

The CRTC website (https://crtc.gc.ca/eng/internet/performance.htm) states *"by the end of 2021, we expect 90% of Canadian homes and businesses will have access to broadband speeds of at least 50 Mbps for downloads and 10 Mbps for uploads."*

Hornby Island's service is a far cry from the National Standard, with a reported 95% of users experiencing less than half the Canadian Standard!

RESPONSES (179)   WORD CLOUD   TAGS (6)

+ New Tag

You've added 6 tags

Tag		Percentage	Count
1 to 6 mbps		44.13%	79
15 to 25 mbps		6.15%	11
25 to 50 mbps		3.35%	6
50 or over mbps		1.12%	2
6 to 15 mbps		25.14%	45
Less than 1 mbps		18.99%	34
Untagged		1.12%	2

It should be valuable to continue the conversation with service providers and regulators in pursuit of better internet services on both Hornby and Denman Islands.
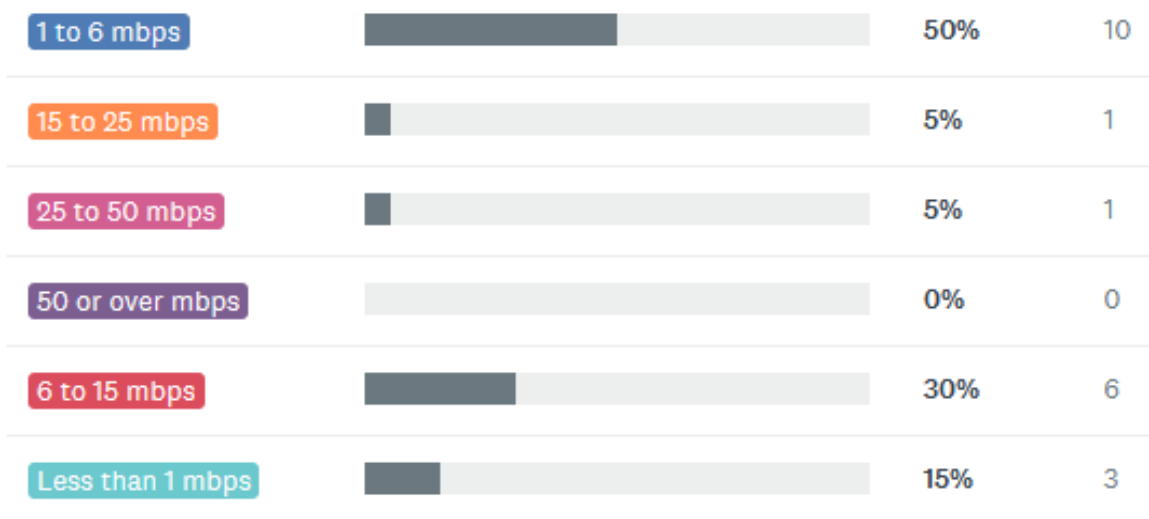
Analyzing the Numbers

Families with School-age Children, and Internet Inadequacy

Hornby's school-age children need to have access to good internet.

The survey found, of the 22 responding households that have children age 3 - 18, all use the internet, with none of them satisfied with their service looking into the foreseeable future. 91% of these families use Telus copper wiring internet, resulting in 90% of these families with download speeds of under 15 Mbps and a whopping 65% with service speeds under 6 Mbps download.

The educators at the Hornby Community School reported that many children had challenges with homework assignments due to poor home internet, and that parents that choose to home school their children face serious difficulties. The survey suggests that Hornby's internet service may be weak in relation to its capacity to support children's education.

Families with school aged children may subscribe to less expensive service plans, and their results are somewhat lower that the overall picture, with 95% of them reporting less than 15 Mbps.

1 to 6 mbps		50%	10
15 to 25 mbps		5%	1
25 to 50 mbps		5%	1
50 or over mbps		0%	0
6 to 15 mbps		30%	6
Less than 1 mbps		15%	3

On the economic front, 1/2 of these families also reported operating a home based business (with from 1 – 10 people working at that location), with these poor levels of internet service
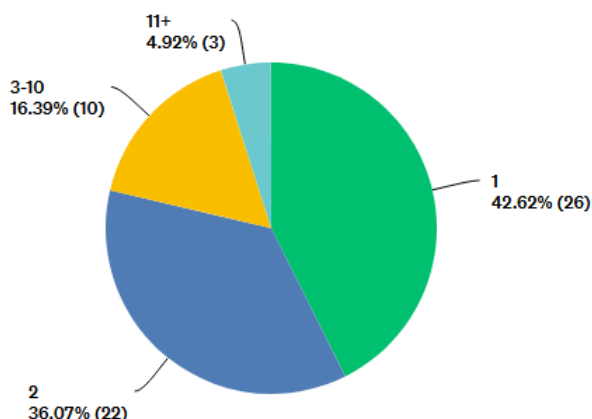
Inadequacy for Business

The survey found Hornby's businesses consider the current internet service has significant inadequacies. 127 respondents said they use the internet for business purposes and 79% declared the internet is inadequate to conduct their business effectively. 86% have Telus copper wiring infrastructure internet that delivers under 15 Mbps download speed to 90% of respondents. The most dire reports were from 21 of these respondents download speeds below 1 Mbps.

These business respondents represent the livelihoods of upwards of 150 people, as indicated in the graph below.

If you are a business, enter the number of owners/operators and employees who work at the location.

Answered: 61   Skipped: 66

It seems clear that poor internet services are inhibiting Hornby Island's businesses' performance, and impeding Island economic sustainability.

Inadequacy for Seasonal Residents

25% of the respondents, or 57 households, indicated they are primarily seasonal residents on Hornby. Approx. half of these households had seniors present, and about half were younger than 65, couples and families.

63% have Telus internet accounts, while most of the rest are using some form of cellular service to access the web. 80% of the seasonal households have indicated they are not satisfied with Hornby's internet options.

While 53% of this sector currently pays less than $60/mo. for their internet, 67% state they are willing to pay more than $60. for higher speeds. And very interestingly, this sector has much less aversion to a cellular component than the resident population. 65% of the seasonal residents are open to using some form of wireless or hybrid system to deliver better internet.

This sector also identified inadequate internet on Hornby as impeding population growth, with it's resulting economic and social growth. 50% of the seasonal residents stated that the poor internet is affecting their ability to migrate from being a seasonal resident household to full-time residency, and to live on Hornby for the long term.

It is clear that seasonal residents find a lot of shortcomings with the internet on Hornby Island.

Inadequacy for Seniors and Their Satisfaction

125 households that have seniors present responded to the survey, representing 54% of the total 229 responses to the survey.

These included 88% who access the internet using Telus plus another 6 who subscribe to internet with other companies (who would be using the Telus lines); 6 who use satellite service; and the remaining handful using some kind of limited cellular option.

Common concerns, expressed by at least 1/3 of the respondents include the impact of poor service on educational opportunities, safety and emergency services, business functions, enjoyment/entertainment, alleviating isolation, reducing costs/carbon footprint of travelling, and attracting young families. The concern around attracting young families is two-fold, one that they enhance diversity in the community, and two they are necessary as a workforce to provide services for the aging population.

A clear finding in reviewing this sector is that Hornby Island has a very active senior population, as many are still choosing, or need to, continue working. 35 of the 125 senior respondents indicated that they use the internet for business purposes, with upward of 80 people working at their locations. Our active arts community accounts for part of this number

If you are a business, enter the number of owners/operators and employees who work at the location.

Answered: 35   Skipped: 90
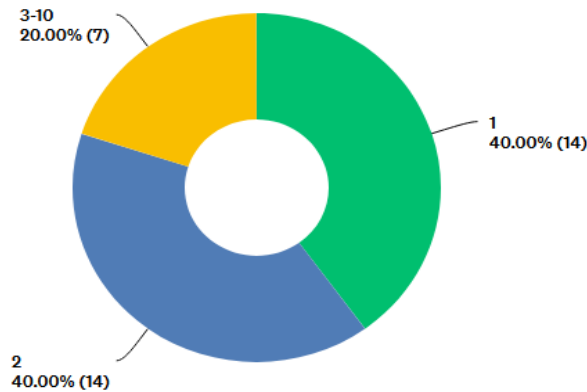
A high percentage of the population, including seniors, use the internet for enjoyment, perhaps to view Netflix or YouTube, or Skype with family members and friends. Netflix recommends a minimum speed of 3 Mbps[7] for streaming video, and 5 Mbps for high definition video. 62% of Hornby's reporting seniors have speeds under 6 mbps, with fluctuations. Especially in the summer months, with increased usage of the service by visitors, dips and drains occur. 70% of reporting seniors are dissatisfied with their current options for accessing the world wide web.

The New Horizon's Seniors Centre on Hornby has not subscribed to internet, as service in the neighbourhood where it is located, is poor

Inadequacy for Enjoyment

The opinion expressed most commonly by survey respondents is that the internet speed or capacity is inadequate for their enjoyment. One hundred and fifty three (82% of all respondents) expressed this view.

- Reasons for this displeasure are related to the capacity of providing internet with either copper wiring infrastructure and/or satellite. The download and upload speeds of the plan are important factors in determining your actual Internet speeds. Some people may not be able to afford the more robust plans, even if they were available.

- Number of devices being used. If other family members are using the internet on a computer, tablet, or smart phone it impedes performance of them all. Many devices using the Internet at the same time compete for the same speeds and can slow things down. This is particularly important for families and small businesses.
- With 28.3% poverty, people are probably not upgrading their computers and equipment regularly, like some more wealthy people would. An older computer will struggle to keep up with the demands of new applications.
- Heavy traffic in the neighbourhood, or even on a popular website, will affect speeds. If thousands of other people are trying to access the same website, it may affect how quickly you can access that site. This can be impacted by time of day, and even day of the week.
- Technical factors like latency (the time it takes for data to travel from a source to a destination) and packet loss (the number of data packets sent to or from your home that don't get to their destination) can slow your Internet speeds. This is identified as one of the drawbacks of satellite internet, along with inclement weather.

Two factors that were covered in the survey may aid in understanding why so many users find their enjoyment impeded. Twenty-two respondents, thirty percent of those who weren't enjoying their internet, said the problems occur at certain times, and certain days.

Major areas of entertainment/enjoyment are video data such as Netflix and YouTube, live streaming and online games – low internet speeds result in interruptions in the transmission of larger data files including images, which would impair enjoyment of the internet.

What else?

Three questions were directed at the concerns over being a remote community, dependent of ferry service to access many services, that aren't available locally.

The first is mainly an economic question, that would allow a marginalized population more affordable living: 37% of respondents indicated that they would reduce their cost of travel by accessing services via the internet, that they currently travel to use.

The second is a question of the GNH index – Gross National Happiness. On a remote island, where it may be difficult for your family to visit, and your nearest neighbour lives down the road on acreage, people can feel disconnected:

- 84 people (45% of respondents) said that they count on using the internet to help alleviate isolation, and to connect with their community.

The third is a conscious concern for the environment. Hornby Island prides itself on being environmentally aware, with residents as stewards of the land. Climate change mitigation is a challenge that we are facing head-on:

- 39% or respondents indicated that the internet would alleviate the necessity, thereby reducing their carbon footprint, of travelling in a vehicle, and then on two ferries (each way), and driving to their off-island appointments or to shop and purchase services on Vancouver.

The Price Question

The second most common opinion revealed by survey responses is that <u>respondents do not believe they are getting value on their internet service.</u> The numbers are fairly consistent between what people are paying now, and what they are willing to pay. However, the survey clearly depicts their dissatisfaction, it lies not in the price, but rather on what they receive for that payment.

What would you be willing to pay for faster, reliable high-capacity internet?

Answered: 221   Skipped: 8
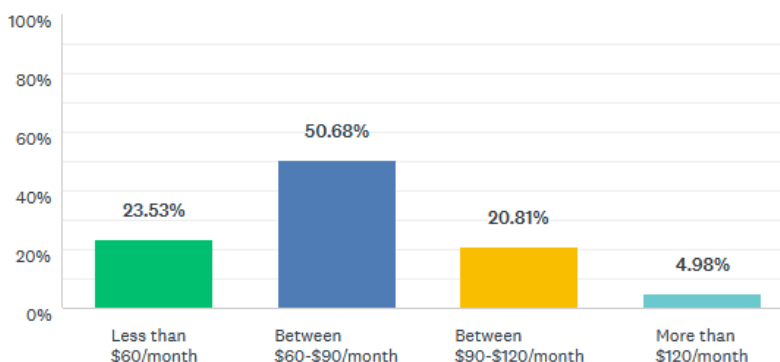
The amounts that households/home businesses are currently paying:

- 22.07% of people currently paying less than $60./month.
- 56.81% paying between $60 - $90/mo
- 13.62% paying between $90 - $120./mo
- And 7.51% paying more than $120./mo.

Comparing the monthly payments actually paid, to the amount people are willing to pay, a monthly cost of $60-$90. Seems to be realistic, if the service was dramatically improved.

Summary of Findings

This report has provided information about the internet services received on Hornby Island, and Islanders' views about many aspects of this service.

Hornby has particular needs for internet services. The population is growing, with significant seasonal/summer spikes in the population. It has key population groups that, for different reasons, require good quality, reliable internet (seniors, school-age children, businesses). Also, seasonal residents are an important component of Hornby's economy, and good internet is vital to attracting, and servicing the needs, of these people.

The speed of internet services on Hornby Island is far below the service received by most Canadians. The federal agency that regulates internet in Canada, the CRTC, has established a target that 90% of all Canadians have access to broadband internet speeds of at least 50 Mbps for downloads and 10 Mbps for uploads, by the end of 2021. It states that 82% of Canadians were obtaining these levels in 2015.

Ninety-five percent of the 173 speed tests reported in the Hornby survey were below 25 Mbps, and that is only one-half of the national standard. Sixty three percent of Hornby speeds were below 6 Mbps. Examination of the speeds reported at different times of the day showed that during periods when the number of internet users is high, there is a disproportionate rise in the low-speed test results. The geographic distribution of the lower speed results was examined, and over half of the Island is affected by the very slowest of speeds. One of our major concerns is that the "last mile" infrastructure is outdated copper wiring. Telus has told the community that this type of set-up has a finite expected life. Unfortunately, due to our low population density, replacing it is not economic for Telus, as the Return on Investment is insufficient to warrant investment. If we don't work towards improving this utility, we may end up with more and more bandaids on a failing, outdated, white elephant.

Hornby and Denman Islands would benefit economically, socially, and environmentally from receiving internet to the standards that have been set by the Federal Government. As meeting the definition of "rural, and remote, communities", the Islands should be eligible for funding to invest in infrastructure upgrades from Senior Levels of Government.

This survey offers resounding evidence that the population is together on this project, that we are a community looking to "get connected". We need to push forward the conversation with service providers and regulators in seeking to improve our connectivity.

APPENDIX C
SECTORAL CONSULTATIONS
CONNECTIVITY ON DENMAN & HORNBY - CURRENT STATE AND FUTURE NEEDS

**Denman Island Internet Committee
and
Hornby Island Community Economic Enhancement Corporation**

November 25, 2019

CONNECTIVITY ON DENMAN & HORNBY– CURRENT STATE AND FUTURE NEEDS			
Socio/Economic Factors	Current Situation	Anticipated Future	Limitations in Current Situation
INTRODUCTION	Denman (DI) has 592 occupied HHs, Hornby (HI) has 560(Census). **DIIC survey** (responses 185/592 HHs) showed 95% of respondents use internet. Mainly Telus, 10-15 % Xplornet, some smart hubs and tethering. **Hornby survey** (225 of 560) showed 100% use the internet, with 87% using Telus. 62% of respondents reported download speeds of 6 mbps, or less. Only 1% reported speeds at the Canadian standard, and they have special services set up. 94% of Hornby residents reported that they are not satisfied with their current internet for the foreseeable future.	According to the 2016 census: DI 5-yr growth rate 14%, HI 6%, BC rate 11.6%	High growth on islands, esp DI, requires growth of many services, including internet. Current residents, on both islands have identified economic impediments from poor internet. Telus policy obstructs our future. (Stated no future spending on copper wiring infrastructure, which provides last mile service on Hornby and Denman)
GENERAL Overall attractiveness of our communities	Northern Gulf Islands gradually becoming better known as a destination to visit, a place to live, retire.	As costs grow in urban BC, and environmental conditions deteriorate there, there will be increasing interest in re-locating to Gulf Islands. Internet access will be an important quality in the future of our islands.	Telus' ADSL impedes success of our islands. We need wider distribution of hi-speed internet, more capacity, at affordable prices.
GENERAL Scale of internet activity	At present the internet is largely seen as separate from telephone and television	In a connected world with fibre service, telephone, television and internet can be combined, if the ISP is capable of realizing these full potentials	Telus' ADSL impedes success of our islands. We need wider distribution of hi-speed internet, more capacity, at affordable prices.

CONNECTIVITY ON DENMAN & HORNBY– CURRENT STATE AND FUTURE NEEDS			
Socio/Economic Factors	**Current Situation**	**Anticipated Future**	**Limitations in Current Situation**
GENERAL Household Shopping	Internet shopping is increasing.	Online shopping will continue increasing. There is much concern about climate change, and many people will choose to order over the Internet to minimize travel, especially on ferries and in private vehicles.	Telus' weaknesses impede our islands' capacity into future.
GENERAL Communications	Email and texting widely used, especially by young. Some VOIP, FaceTime/Skype etc, teleconferencing. There is currently no internet at the Hornby Radio, CHFR 96.5	Importance of HH communications willincrease with better familiarity with Information Technology Communications (ITC). Provides an alternative to transportation (fossil fuel use) that allows a lower carbon footprint and less expense. Hornbyradio.com is considering internet streaming and an island-wide internet upgrade would improve the likelihood of the Radio being able to stream radio. This would be significant for emergency services use, public announcements, news sharing, and public entertainment.	Our islands need wider distribution of hi-speed internet, more capacity, at affordable prices, to allow expansion of internet uses.
GENERAL Entertainment	Internet used for NetFlix,etc, online gaming, networked musical "jamming". NetFlix functions at 3 Mbps (44% of HHs in DI survey below 6 Mbps). Music is a very important entertainment sector on our islands, with a multitude of Festivals & Happenings.	Expect more use of smart tv, streamed entertainment, networked activities. As musicians work together, they will need more access to digital uploads to market their work. Non-profit organizers of Festivals & Events will need increasing access for day-to-day operations, online Box Offices, logistical planning, grant applications, content sharing, social media exposure, collaborations within the industry and access to clients, and research.	Telus' ADSL impedes digital entertainment of our Islands. We need wider distribution of hi-speed internet, more capacity, at affordable prices. Current infrastructure has a significant impact on this sector's ability to function organizationally, as employers and entertainers, and providers of programming in our communities.

CONNECTIVITY ON DENMAN & HORNBY– CURRENT STATE AND FUTURE NEEDS			
Socio/Economic Factors	**Current Situation**	**Anticipated Future**	**Limitations in Current Situation**
GENERAL Sustainability • Conservation: • Research • Data Analytics	Conservancy Hornby Island reports frequent disconnection from internet. When connected, slow data retrieval. No ability to upgrade to a faster plan. This makes research slow and tedious.	Expect high speed internet to alleviate these issues and enable the Conservancy organizations on both islands to more effectively collect, and record, data for scientific purposes.	Telus preventing fast and efficient collection of research for our study on a herring recovery plan, sharing info with our affiliates.
GENERAL Recreation, family visits	Especially as new residents locate on the Islands, their friends and families will be checking out what to do when they come to visit.	Visitors will increasingly require good internet to make decisions, pre-trip, and also while they are visiting. Many residents report that their grandchildren, and working children, are less likely to visit if they don't have access to high quality internet.	Telus' capacity to improve or grow service is limited to locations near its COs
GENERAL Seniors centre	DI Activity Centre current speed 2.0 -7.6 MBps Hornby Island New Horizons Sr. Centre does not have internet	Membership is growing annually, demand for the use of the Centres is also in growing. The Centres rent meeting hall space to help subsidize Senior activities and operational expenses.More and more renters want high quality, reliable WiFi.	Very poor service
EDUCATION General	DI survey showed only 21% of HHs w/internet and w/children are satisfied with internet, 18% are considering leaving. HI survey showed 37% of respondents felt that the poor internet is an impediment to attracting young families to live on the Island. 40.7% indicated it impedes adult education.	Role of internet growing (distance education, lifelong learning). More courses use more internet for group workshops, hands-on interaction with teachers, fellow students. Home schooling is now entirely dependent on internet usage.	Telus' ADSL impedes educational success on our islands. We need wider distribution of hi-speed internet, more capacity, at affordable prices.

CONNECTIVITY ON DENMAN & HORNBY– CURRENT STATE AND FUTURE NEEDS			
Socio/Economic Factors	**Current Situation**	**Anticipated Future**	**Limitations in Current Situation**
EDUCATION From Home	Education very important. DI population has 64% post secondary, HI has 66%, BC average 47% Education increasingly occurs at home. Students have assignments needing internet. All residents engaged in distance learning, esp seniors in lifetime learning.	Online learning increasingly needs bandwidth. More streaming, more interactive learning, teleconferences. Lifetime learning and distance learning are increasing steadily. Population aging. DI 38% seniors, HI 39% vs BC average 18%. More lifetime learners.	Telus' ADSL impedes success of our islands. We need wider distribution of hi-speed internet, more capacity, at affordable prices
EDUCATION Community School	Telus "managed fibre connection", very expensive. Hornby School reports the island has "Varying coverage for internet, depending on the area of the island, leading to an inequality of access for students in a rural and remote area to complete course work (e.g. video streaming for research from research databases, downloading/uploading and accessing Distributed Learning courses/resources as part of a 4 day Blended Learning model. Uploading/downloading to e-portfolios to demonstrate learning, etc.	Need high calibre of service, reasonable cost. Increased bandwidth is needed for school systems. Teachers report that "Homework for secondary students, as well as Wednesday School access (not located at the school), and home learning being assigned will require increased access to technology and internet access. We currently experience interruptions to operations several times per year due to ferries unable to sail (weather/mechanical issues), power outages and snow. Having technology to support missed school time at home is key for our learners in having equal access to resources. "	No less expensive option. Many families do not have reliable access to internet, or internet strong enough for streaming/large uploads/downloads.

CONNECTIVITY ON DENMAN & HORNBY– CURRENT STATE AND FUTURE NEEDS			
Socio/Economic Factors	Current Situation	Anticipated Future	Limitations in Current Situation
MEDICAL **OVERVIEW**	Little use of the internet for medicine at present. Some personal alarms use telephone, but not widely used on our islands. Tele-Health available (2019). The Hornby/Denman Health Care Society uses internet access for operations and service provision. They also make access available to health care providers and groups that use their boardroom.	Expect health care system to move to a greater reliance on technology to deliver health services including virtual access and tele-health services (medical diagnosis and consults), monitoring, booking doctor appointments, group interactions, as well as a transition to electronic medical records. These will require improved speed and reliability.	Limited capacity for reliable online equipment Telus' ADSL impedes capacity of our islands to participate in medical progress. We need wider distribution of hi-speed internet, more capacity.
MEDICAL Doctors, dentists, physios, therapists	Several doctors, dentists practicing or retired, many yoga, fitness facilities	Online medical equipment, patient monitoring, doctor appointments, specialist consultations, interactive exercise session. Dr. training, mandatory Continuing Medical Education will be online.	Limited capacity for reliable streaming sessions
INSTITUTIONAL Fire, first response and lifeline	Communications problems on both islands. Responders must use pagers. Secondary alerts for incident call-outs. Download dispatch logs to add to incident reports after every call. Mapping apps for addresses - Training materials - Training evaluations, online exams Webinars save significant dollars vs. sending someone off island for a day of training. Public messaging through web site, social media	Improved connectivity for pagers, lifelines. More health conditions needing direct connection. Online training, online property monitoring.Increased use of web-based training in the form of webinars 5G microcells in central transportation corridor would improve public safety by enabling communications Increase service levels would allow for better mapping apps on apparatus which would help us get to emergency scenes more quickly	Need reliable service with minimal vulnerability The existing internet Copper infrastructure is maxed out and exhibiting dropouts when under heavy use. This causes loss of use and i.p. address changes which require us to reset login credentials On Hornby Island the lack of cell coverage in central corridor becoming a public safety hazard.

CONNECTIVITY ON DENMAN & HORNBY– CURRENT STATE AND FUTURE NEEDS			
Socio/Economic Factors	**Current Situation**	**Anticipated Future**	**Limitations in Current Situation**
INSTITUTIONAL Ambulance (Denman only)	Little use of internet	Online training, online patient monitoring	Telus' capacity to improve or grow service is limited to locations near its COs
INSTITUTIONAL Community Internet portal	Denman free portal has very poor service	Service should be expanded as welfare measure	Telus' capacity to improve or grow service is limited to locations near its COs
INSTITUTIONAL Museum	DI. Part of senior's centre. No online presence	Expect online (virtual) museum	Limited capacity for reliable streaming sessions
INSTITUTIONAL Parks, trails	3 on DI, 5 on HI. Parks largely without attendants or information provided	Parks could be more interactive, offer WiFi to campers, digital displays for educational purposes, online bookings for overnight camping, etc.	Limited capacity for WiFi
INSTITUTIONAL Public Transportation: Bus	Hornby Bus, has a website and a Facebook page	The bus could be tracked similar to the bus on Gabriola Island, using a cellular network: https://wheresgertie.ca/ Additionaly it could have an onboard surveillance system and the ability to be in constant communication - High frequency radio on the bus and a dispatcher	No cellular service in the centre of Hornby Island.
INSTITUTIONAL Public Transportation: Ferries	Internet access via fibre optic lines at Buckley.Bay and Gravelly.Bay, and via line of sight, at Denman.West and Shingle Spit Terminals. For the terminals (booths and signage -vessels have connectivity via XX (Source: Darin Guenette Strategy & Community Engagement British Columbia Ferry Services Inc.)	BCF is researching wi-fi capabilities at all terminals; using digital signage as hotspots -planning to cease printing sailing schedules in 2020 -new BCF website to launch soon, providing customers with new capabilities and functionality for travel planning -would like to have improved connectivity for ships/terminal, ideally via XX (Source: Darin Guenette)	Some customers on islands have no internet access (or very limited/slow), so BCF aim to encourage online info/planning/booking, etc is hampered. Difficult to get timely info (breakdowns, schedule changes, etc) to customers if they are not all online in real-time. (Source: Darin Guenette)

CONNECTIVITY ON DENMAN & HORNBY– CURRENT STATE AND FUTURE NEEDS			
Socio/Economic Factors	**Current Situation**	**Anticipated Future**	**Limitations in Current Situation**
INSTITUTIONAL **Local Government:** • Denman Island Ratepayers Assoc. (DIRA) • Hornby Island Residents & Ratepayers Assoc. (HIRRA) • Islands Trust • CVRD	Peter Luckham Chair, Islands Trust Council pluckham@islandstrust.bc.ca September 5, 2019 In a letter to: (Provincial) Minister of Citizens Services & (federal) Minister of Innovation, Science and Economic Development Canada Expressed the need for Gulf Islands improved internet. The Hornby local government, HIRRA, reports very poor Operational internet: PING: 21ms DOWLOAD 5.96Mbps UPLOAD 0.81Mbps	"That Trust Council, by a letter signed by the Chair, request the appropriate agencies of Canada and the Province of British Columbia to take steps to facilitate and fund the safe and reliable improvement of internet connectivity throughout the Trust Area" (Source: Peter Luckham) HIRRA anticipates continued and expanded need for internet access to support office work and meetings, potentially also video-conferencing with off-island agencies.	"Improved, high-speed broadband internet connections for residents in rural and remote communities will in turn help to improve their quality of life. Improved connectivity can help community members to reduce their greenhouse gas emissions via reduced travel, access education and health services, participate in economic opportunities that are compatible with the conservation of island resources, and better participate in the decision-making processes of all levels of government." (Source: Peter Luckham)
INSTITUTIONAL Library	Denman library no internet The Hornby library does have internet, not robust, but the V.I. Regional Library has a tech. staff and is looking at ways to improve client experience via digital connectivity.	Internet would encourage library use. Jason Kuffler Sales and Marketing Officer Vancouver Island Regional Library Phone: 1.250.753.1154 x 246 Mobile: 1.250.327.1291 Email: jkuffler@virl.bc.ca Web: virl.bc.ca Jason states: "support for the creation of local infrastructures so that library customers can enjoy the benefits of our digital resources.	Limited capacity for reliable streaming sessions.

CONNECTIVITY ON DENMAN & HORNBY– CURRENT STATE AND FUTURE NEEDS			
Socio/Economic Factors	Current Situation	Anticipated Future	Limitations in Current Situation
COMMERCE Employment – High Tech	Some online technical workers now, some telecommuting. Known examples include a geo (runs 8-hr computer models), engineer (who can't leave Vancouver because of weak Denman internet), computer graphics (who finds her Denman connectivity is at the margins, may have to leave). On Hornby 13% of the survey respondents need advanced business capabilities (data base modelling, digital graphics, multi-media collaborations). These include Software & website developers, music recording studio, digital artists, videography, photography, engineering, architecture, etc. Further, consultation indicated that many professionals are limited in the time they can spend on Hornby due to the poor digital infrastructure in place.	Much more of what is seen now. Younger "tech"people are increasingly footloose, are fleeing big cities, high property values, excess consumption of energy, and with good connectivity are making the lifestyle choice to live on Hornby and Denman Islands. Additionally, many baby boomers are easing into retirement by working part-time, and living on the Islands around a limited work schedule.	Telus' ADSL impedes success on our islands. We need wider distribution of hi-speed internet, more capacity, at affordable prices. High technology applications have limited ability to fully participate in the digital economy.
COMMERCE Employment – High Tech Banking	The Union Bay Credit Union is the banking institution serving Hornby and Denman Islands. They use Telus internet to provide access to our banking system and servers in addition to free public WiFi service.	"With a greater focus on technology, we will continue to require improved internet speed and service. The branch will eventually be getting an ATM machine which requires further connections. Ultimately, we would like to be able to provide enhanced banking services such as lending and financial advising which are completed in an office via video conference to employees which are off-island. "	The current internet speed is just barely adequate to operate a banking system and connect to our servers, any further enhancements to the service at the Hornby/Denman branch will require improved internet infrastructure.

CONNECTIVITY ON DENMAN & HORNBY– CURRENT STATE AND FUTURE NEEDS			
Socio/Economic Factors	Current Situation	Anticipated Future	Limitations in Current Situation
COMMERCE Employment – Low Tech	Some use of internet for secondary work activity (such as selling on eBay, Kijiji,). Some interaction with regulators, benefits providers. Minority younger population have websites, some work-at-home.Hornby survey, 54.7% of respondents use internet for basic business (till and billing, bookkeeping, credit cards, sales, accounting, banking, inventory, research, ordering, promotion, advertising). Remote workers are self-identified in the fields of art, music, tourism, teaching, business consulting, counselling, farming, medical practitioners, manufacturing, business management, law, and research.	Work at home will be much more common, across the age ranges (especially tele-commuting).

Feedback during this consultation has been very vocal from our remote workers – we need better internet for equal opportunities in our industries. With improved digital connectivity more people will be able to do business on the islands, helping to alleviate the cycle of poverty for many working residents. | Telus' ADSL is a significant impediment to success on our islands. We need wider distribution of hi-speed internet, more capacity, at affordable prices. |
| **COMMERCE** Business Start-up | Island Stars Observatory makes all it's customer contacts via the internet not to mention the need to remain current on weather, astronomical news and the ability to perform online banking. | Improvements in service would allow this business to operate with greater efficiencies. Fast, direct link video to major world observatories would enhance the experience for clients.

-Uploading of music and merchandising opportunities. | Current service is slow, and inefficient |
| **COMMERCE** Accommodation: Lodging, B & Bs, Resorts, Campgrounds | 14 on DI

Hornby has an estimated 150 vacation rentals, 4 Resorts, 4 campgrounds, 2 glamping businesses, and a handful of B n B's. (Online till, book-keeping, inventory, credit cards, ordering, administration, social media, and training) | Visits will grow, particularly as the summer season is reaching capacity and other ten months are ready for expansion. Businesses use basic business internet, and increasingly sophisticated social media marketing. Collaborations with Destination B.C., Tourism Vancouver Island, and other such organizations increasingly require more digital sophistication. | Telus' capacity to improve or grow service is limited to locations near its Cos.

Demand from both the proprietors and the clients, is very high in this sector, resulting in dissatisfaction. |

CONNECTIVITY ON DENMAN & HORNBY– CURRENT STATE AND FUTURE NEEDS			
Socio/Economic Factors	Current Situation	Anticipated Future	Limitations in Current Situation
COMMERCE Artisans, Galleries	About 12 on DI, 40 on HI. (hubs for 15-20 Potters and many home studios, galleries) (Online till, book-keeping, inventory, credit cards, ordering, sales, social media, etc.)	We are able to function with the current speed but improvements in speed and reliability would undoubtedly make us more efficient and effective in our work. The Hornby Island Arts Council is part of a large digital arts partnership grant that will rely on connectivity if funded. As the Arts Centre grows into a regional association of arts organizations and infrastructure, it will work in partnership with other institutions to leverage attention to our position as a place in which to seek out the arts in Canada as a whole. We cannot be part of this network with poor connectivity. We see our studio tour and map going online for real-time interaction through app development. We also see that the digital arts are a fast-growing medium of expression and that real-time interactive installations that interface through the internet are already happening in arts spaces and doubtlessly will be important in the Arts Centre. Many of the pedagogical futures of the Arts Centre will rely on internet connectivity. We already see speakers coming to present material and having panic experiences with their presentations when they realize there is little or no internet available to them. Another example includes filmmakers at our film fest: we have been lucky to see them attend their films in person so far, however, things can change, and being able to skype in a filmmaker when conditions prevent an in-person delivery would be a critical relief for the festival.	Telus' capacity to improve or grow service is limited to locations near its Cos For out non-profit arts organizations, almost all Arts granting systems have moved online. Financial transactions are increasingly moving online as well: artists expect and need to be paid more promptly and transactions are taking place through a variety of connected technologies. Failing to keep up with efficiencies that allow our staff and board to focus on what matters puts us in a poor competitive position.

CONNECTIVITY ON DENMAN & HORNBY– CURRENT STATE AND FUTURE NEEDS			
Socio/Economic Factors	Current Situation	Anticipated Future	Limitations in Current Situation
COMMERCE Recreational business	3 on DI, 11 on HI. (Kayak/board rentals, fishing charters, water taxi, bikes, boards, horse riding, etc). Hornby is home to Tribune Bay Outdoor Education facility, operated by two School Districts. Over 3000 children/year attend the facility, needing strong broadband capacity for both clients and businesses. The centre completely relies on internet to secure bookings, communicate with current and potential guests, submit reports, statements, grants, conduct video interviews, and other integral business admin. Guests rely on internet access for work, training workshops, student online courses, and general communication due to limited cellular service.	Growth likely. More guiding, fishing, diving, cycling, kayaking, and instructed outdoor experiences especially as related to the ocean. As islands we are surrounded by water, and many recreational opportunities present. The Outdoor Ed. Facility foresees: "Site-wide internet access to better facilitate the needs of specialty groups and academies (Ocean literacy academy, Search and Rescue Academy, Deaf Youth Today, etc.). Proper infrastructure would open opportunities for school academies to study and connect with others while on location. It would allow shoulder season expansion for groups looking to use TBOEC as a mobile office/retreat. Wifi calling would also alleviate communication issues within the staff."	Telus' capacity to improve or grow service is limited to locations near its COs The Outdoor Ed. Facility is a strong proponent of improved internet. "Internet is only used in two buildings due to low speeds and cannot support the annual 3000 guests per year. Large areas around the centre do not have cellular service or wifi, meaning no means of communication in an emergency. Slow productivity in the office due to the ongoing need for uploading and downloading documents."
COMMERCE Retail Stores	9 on DI, 17 on HI (Online till, book-keeping, inventory, credit cards, debit cards, ordering, advertising on social media, training.). The largest retailer, the Hornby Coop Store, has their book-keeping system, equity and membership tracking; much of our business records are centralized through FCL on a mainframe in Saskatchewan.	More small stores and vendors, more online transactions. Sales and traffic have grown steadily over the last 5 years. If this trend continues, improved internet connectivity will support parallel business function growth.	Telus' capacity to improve or grow service is limited to locations near its COs. The current underservicing limits growth and stability in the retail sector. Internet slows with high use on the island. Essential business services and systems become unreliably erratic or stop working altogether.

CONNECTIVITY ON DENMAN & HORNBY– CURRENT STATE AND FUTURE NEEDS			
Socio/Economic Factors	Current Situation	Anticipated Future	Limitations in Current Situation
COMMERCE Industrial, fabrication, production	5 on DI, 9 on HI. (BC Ferries, Denman Chocolate, Corlan Vineyard, HI Estate Winery, Island Spirits Distillery, Middle Mountain Meadery, Sushi Snax, Hornby Energy Balls, Hornby Isl. Brewing, Lerena Vineyard, East Cider Orchard, The Hornby Spark, Maker's Space, etc. The current levels of internet are adequate for emails, and limited use.	Agricultural product market is growing. Market for pottery expanding. Individual industries may require specialised, private internet capacity. For the Maker's Space on Hornby, of particular importance is video streaming, like You Tube, in order to hold offering trainings to a wider audience and also in selling on sites like ebay. This is particularly important for specialized fabrication projects. E.g. Training others on how to make widgets, and selling your widgets to others.	Telus' capacity to improve or grow service is limited to locations near its Cos Insufficient for participating in the global economy. For training and product distribution limitations exist in accessing social media – Twitter, Facebook, You Tube, etc. Difficult to do business without high speed access.
HOUSING Affordable Housing	Not at present, but growing interest	Affordable housing project(s) will need good internet to meet current market expectations.	Telus' capacity to improve or grow service is limited to locations near its COs
HOUSING Seasonal residences, long term rentals	Seasonal and long-term rentals use internet to advertise, attract customers.	Seasonal residents, and new residents, will decide whether to locate to our islands, partially based on the availability, quality and utility of internet	Telus' ADSL impedes success of our islands. We need wider distribution of hi-speed internet, more capacity, at affordable prices.
HOUSING Smart House	Minority of HHs make use of "smart house" capabilities.	HHs will use some smart capabilities for control of HVAC systems, appliances, lighting, security. Key driver will be to minimize energy use.	We need wider distribution of hi-speed internet, more capacity, at affordable prices, to allow expansion of internet uses

APPENDIX D
CONSULTATIONS WITH INDIVIDUALS
ON THE DIGITAL ROADMAP

Denman Island Internet Committee
and
Hornby Island Community Economic Enhancement Corporation

November 27, 2019

Introduction

This Appendix is an examination of the relationship between one component of the community consultation in the Denman Hornby Internet Improvement Project and the "Digital Roadmap" provided by the Connected Communities BC Program. The component being examined is the wide range of interviews and other input the project received, apart from the input obtained from formal surveys and public meetings. The Appendix provides the findings of this program of consultation with important community actors (businesses, institutions, and certain representative households).

Consideration of this content in relation to the Digital Roadmap yields evidence of the strength of our community over the five inter-related foundational elements for digital transformation provided in the roadmap model. This assessment adds to the understanding of our communities' needs and aspiration for improved connectivity revealed by other aspects of our project, our surveys, public events and other interactions, and our sectoral analysis.

The five foundational elements defined in the Ministry of Citizens' Services' Digital Roadmap are the following:

- **Leadership & Support**
- **Connectivity**
- **Digital Capability**
- **Sustainability**
- **Community well-being**

Leadership & Support

(description from the BC Ministry of Citizens Services "Digital Roadmap")

" *Successful communities need strong leadership to drive forward the digital agenda: digital champions serve as leaders and catalysts for change. Communities indicate leadership and support is critical to rally the community around its history and identity and engage residents to reimagine what the community can become in a digital world.* "

Our community has come together to express its desire to have improved connectivity. This project has been led by the Hornby Island Community Economic Enhancement Corporation HICEEC), in conjunction with the Denman Island Internet Committee (DIIC). An extensive program of studying the problem and potential solutions, informing the public, and soliciting and developing public option, has been conducted.

A vision has been developed for a Fibre to the Home project, encompassing all properties on both islands. This will allow better cell service by way of WiFi calling, and will dramatically improve the delivery of both cell and internet services. The communities of Hornby and Denman Island are extremely concerned about the safety of wireless infrastructure, and do not want to go in that direction, even if it means better cell service and cheaper internet rates.

The committees conducted formal surveys on both islands over a 12-14 month period that achieved remarkably high response rates, documenting the communities present internet services, views about these services, and opinions about needs for improvement.

The project secured grant support from both local and provincial sources. Grants have been obtained from HICEEC, Denman Works, and the Province of British Columbia's ICET program, and its NDIT Connecting British Columbia program. The grants fund have been used to contract the services of a skilled, experienced technical contractor, Baylink Networks, to develop a detailed, feasible, and economically practical strategy for implementation of the community's vision, including resources & funding. Technically, this project support is referred to as a Digital Roadmap and Implementation Plan.

The community has strongly expressed its aspiration for the functions and activities that will be enabled by improved internet, specifically by achieving the Canadian Standard of 50 Mbps of download speed, and 10 Mbps of upload. The existing copper wire infrastructure is out-dated and incapable of serving most residents with anything but the lowest of speeds. The whole "last mile" infrastructure for delivery will need to be rebuilt.

In order to create direct dialogue with a wide cross section of users for digital connectivity, additional activities were undertaken.

- An approach was made to individuals via a 1600 person "Hornby Community Connections" Facebook page, as well as by direct phone calls and emails. Nearly 50 people responded, identifying unique needs and aspirations for digital needs when working from home. (Much of this feedback can also be seen in Appendix C).
- Direct contact was made with businesses, institutions, and some individual associations on both islands.
- Questionnaires were handed out at the Hornby Island Community Economic Enhancement Corporation annual Fall Business Mixer and the 6 person Ferry Advisory Committee meeting. From the feedback regarding ease of completion, this survey was put online. A Facebook posting was then made to invite others to also respond. This resulted in 42 questionnaires being completed.
- Public meetings were held on both islands on November 3. These were widely advertised in both print and social media, as well as on three roadside billboards. About 70 people attended each meeting.
- Caroline Sneath from HICEEC, and Tony Gregson from DIIC attended the Rural & Remote Islands Forum on Pender Island, Nov. 7th & 8th, to connect with other B.C. Island communities. A primary purpose of attending was to dialogue with other Island communities regarding their internet initiatives and to discern whether there was any new information that would beneficially be included in the work being done by the Hornby and Denman communities.

Connectivity

" *Being digitally connected is the cornerstone of connected communities – unlocking the benefits that come with connectivity and transforming the way residents in rural areas live their day-to-day lives. Speed, access and affordability are fundamental connectivity factors that can help transform local economics and in unprecedented ways, strongly position rural communities to attract renowned talent and drive sustainable growth and development.* "

Through comprehensive discussions with people in leadership roles and also with any citizen in the community who chose to engage, a clear picture has formed that the community's needs and aspirations are to become a "Connected Community". This section quotes findings from direct community consultation that underpins this observation.

Lori Nawrot, Hornby Denman Health Care Society:

We anticipate a greater reliance on technology to deliver health services including virtual access and tele-health services as well as a transition to electronic medical records. These will require improved speed and reliability. Internet speed and reliability has limited our ability to participate in video-conference meetings and trainings.

David Critchley, Denman Trustee, Islands Trust:

My current provider is Explornet, so the service is satellite based. As such it is expensive and "laggy". So far it has been basically reliable although it shuts down from time to time and the system needs to be rebooted. Also, the connection tends to shut down for video display during electronic meetings. These meetings can be four or five hours duration and during that time the video will disappear perhaps three or four times. Furthermore, these meetings are conducted using separate telephone connections for the audio component. This is on the recommendation of Island Trust technical people who advise that there is generally not sufficient bandwidth for most Trustees on the islands to have a steady connection.

Etienne de Villiers, Architect/Builder, Denman Island:

We are using the internet constantly throughout our workday. We upload and store all our documents & construction drawings online so that they might be accessed by contractors/clients and us regardless of where we are in the world. We use the internet to host online meetings with clients or groups of professionals involved in a project. This allows us to reach a much bigger client base, besides serving the needs of the community here. It allows us to stay in business.

If the internet fails we usually have to stop work for the duration of the outage and our contractor in the office has to go home, which costs us both financially and timewise. During online meetings, we're unable to share our webcam with any clients, we're also unable to effectively hold a meeting with more than one person at a time. The internet is just too slow and the lagging caused prevents clear communication.

Cath Gray, Administrator, Conservancy Hornby Island:

Current service provides constant disconnection from the internet. When connected, slow data retrieval. No ability to upgrade to a faster plan. This makes research slow and tedious. Telus service is preventing fast and efficient collection of research for our study on a herring recovery plan, and sharing info with our affiliates. Looking to the future, expect high speed internet to alleviate these issues.

Darin Guenette, Strategy & Community Engagement, British Columbia Ferry Services Inc:

The terminals (booths and signage) at Buckley.Bay and Gravelly.Bay, have dedicated internet access via fibre optic lines, the terminals at Denman .West and Shingle Spit have line-of-sight connections to their sister connected terminal. BCF is "researching wi-fi capabilities at all terminals; using digital signage as hotspots
- planning to cease printing sailing schedules in 2020
- new BCF website to launch soon, providing customers with new capabilities and functionality for travel planning
- would like to have improved connectivity for ships/terminals".
Some customers on islands have no internet access (or very limited/slow), so our goal of encouraging them to be online for info/planning/booking, etc is hampered. It is also difficult to get timely info (breakdowns, schedule changes, etc) to customers if they are not all online in real-time.

Rachelle Chinnery, Educator/Artist, Hornby Island:

I did a graduate degree part-time online and it was very difficult uploading multi-page documents, as well as downloading multi-page research and library listings. That was three years ago. This spring I'm hoping to take more graduate courses and am somewhat dreading the download times. For anyone teaching or studying through distance education, much better Internet is needed on our island, studying online, too.

Pat Jones, Owner, Corlan Vineyard and Winery, Denman Island:

We need strong internet for our email, online banking, ability to take credit cards, sourcing materials and contacting suppliers. Liquor control requires that all licence reporting, renewal etc is online - this is very important for our business.

John Nemy, Island Stars Observatory, Hornby Island:

Island Stars Observatory makes all it's customer contacts via the internet not to mention our need to remain current on weather, astronomical news and the ability to perform online banking. Improvements in service would allow this business to operate with greater efficiencies. Fast, direct link video to major world observatories would enhance the experience for our clients. Uploading of our music and merchandising opportunities is slow, and inefficient.

Marc Atkinson, The Barn Recording Studio, Hornby Island:

It is very important to my biz to have fast speed both up and down. I'm constantly sharing files back and forth with other musicians and producers. I have had to stop teaching by Skype for the most part, as it was to unreliable. Living in a remote area can be fantastic when the internet is up to standards with the folks of the city. There is no reason why a professional can't work from home here on Hornby if the internet is solid.

John Heinegg, Medical Editor for Medscape, a subsidiary of WebMD, Hornby Island:

I spend a great deal of time during the workday waiting for downloads and uploads to complete. Bringing speeds up to the Canadian standard would help my efficiency (and reduce the annoyance factor). I also have a side business that involves video conferences with clients; the connection is often poor.

Karen Elder, Bent Tree Studio, Hornby Island:

Doing marketing and exposure online as an artist through websites, google search, fb page, ordering supplies, using square and e-transfers, ordering prints, keeping up-to-date with art happenings on island and off, and on and on. Definitely helpful to have better internet!

Dominique Husereau, Contractor, Job Shop, www.ceas.ca, Hornby Island:

Poor island internet makes job searching online from home difficult. Everything is online.

Digital Capability

(description from the BC Ministry of Citizens Services "Digital Roadmap")

" *Digital capability is the key to participating in a knowledge-based world. Greater capability at the community level drives business opportunities and improves livability. A focus on digital literacy, adoption and skills development for personal and business benefit is fundamental to building capability. From distance learning programs to local training and college partnerships, it goes beyond simply training and developing skillsets, but extends to supporting and fostering innovation and tapping into the opportunities that come with it.*
"

Alissa Pratt, Vice-Principal, Hornby Elementary School and member of the Hornby Island Education Society:

Students access to internet: Varying coverage for internet, depending on the area of the island, leading to an inequality of access for students in a rural and remote area to complete course work (e.g. video streaming for research from research databases, downloading/uploading and accessing Distributed Learning courses/resources as part of a 4 day Blended Learning model. Uploading/downloading to e-portfolios to demonstrate learning, etc. We currently experience interruptions to operations several times per year due to ferries unable to sail (weather/mechanical issues), power outages and snow. Having technology to support missed school time at home is key for our learners in having equal access to resources.

Daryl McLoughlin, Owner, Denman General Store:

We have both a business and a residence. We require high speed internet for the business to operate our Point Of Sale devices, our ATM as well as the computers for communications. For our residence we use the internet for emails and for television (our residence is not satellite accessible). My residence is about 2 kilometres away from the store (business).

For the business we have very fast and reliable internet service. We are very happy with the service we get and Telus does meet it's commitment to be up over 99% of the time. For our residence the download speeds are very slow and they are not fast enough to get full television service. The television service stops and starts. I would be constrained in my ability to run a business out of my home due to the slow internet speeds.

Mark Jones, Manager, Union Bay Credit Union (Hornby):

We are using Telus internet to provide access to our banking system and servers in addition to free public wifi service. With a greater focus on technology, we will continue to require improved internet speed and service. The branch will eventually be getting an ATM machine which requires further connections. Ultimately, we would like to be able to provide enhanced banking services such as lending and financial advising which are completed in an office via video conference to employees which are off-island. The current internet speed is just barely adequate to operate our banking system and connect to our servers, any further enhancements to the service on Hornby will require improved internet infrastructure.

Lisha Scott, Team Manager, Co-op Store/Gas Bar and adjacent Ringside Retail & Food Market, Hornby Island:

We use internet for Point of Sale systems, credit/debit card transactions, ATM, online communications (email, FB, website, web meetings), training, much of our wholesale supplier ordering, and our essential business systems rely on internet connectivity. Our book-keeping system, equity and membership tracking, much of our business records are centralized through FCL on a mainframe in Saskatchewan. Internet connections slow with high use on the island. Our essential business services and systems become unreliably erratic or stop working altogether.

Looking to the future, we need improved connectivity. Sales and traffic have grown steadily over the last 5 years. If this trend continues, improved internet connectivity will support parallel business function growth.

Alex Ortwein, Manager, Tribune Bay Outdoor Education Centre, (3000 students/year from School Districts 69 & 71):

The centre completely relies on internet services to secure bookings, communicate with current and potential guests, submit reports, statements, grants, conduct video interviews, and other integral business admin. Guests also rely on internet access for work, training workshops, student online courses, and general communication due to limited cellular service. Site-wide internet access to better facilitate the needs of specialty groups and academies (Ocean literacy academy, Search and Rescue Academy, Deaf Youth Today, etc.). Proper infrastructure would open opportunities for school academies to study and connect with others while on location. It would allow shoulder season expansion for groups looking to use TBOEC as a mobile office/retreat. Wifi calling would also alleviate communication issues within the staff. Internet is only used in two buildings due to low speeds and cannot support the annual 3000 guests per year. Large areas around the centre do not have cellular service or wifi, meaning no means of communication in an emergency. Slow productivity in the office due to the ongoing need for uploading and downloading documents.

Steve Carballeira, Hydro-Geologist, Owner – H2O Environmental, Denman Island

My internet needs are the ability to run an efficient business. I currently have difficulty loading maps, databases and figures which I require for my hydrogeologic business. This increases my time spent on each project. Webinars are very hard to attend as are video conference calls. Additionally, streaming basic Netflix or Prime Video is challenging.

Quana Parker, Spark, Maker's Space, Hornby Island:

Current internet is adequate for emails, and limited use. It does not allow the Centre to make full use of the potential. Of particular importance is video streaming, like You Tube, in order to hold offering trainings to a wider audience and also in selling on sites like eBay. This is particularly important for specialized fabrication projects. E.g. Training others on how to make widgets and selling your widgets to others. Insufficient for participating in the global economy. For training and product distribution limitations exist in accessing social media – Twitter, Facebook, You Tube, etc. Difficult to do business without high speed access.

Don Peterson, Don Peterson Photography, Hornby Island:

Better internet would certainly make uploading large files (photographs) for clients or printers much easier. Some days here it is simply not possible and on good days it is just very slow.

Henry Touwslager, Touwslager Engineering, Hornby Island:

I cannot get good enough speed and reception to log into my work computer and work remotely. It is possible to login sometimes but it is extremely slow and extremely unproductive.

Kim Lake, Graphic Artist, Hornby Island:

I thought I'd contribute to why better internet is of benefit to me as a Hornby island resident and artist. I'm primarily a digital illustrator and graphic art practitioner. I don't work at this full time or even part-time as I'm limited to a local clientele due to upload issues. I can't send large files that my industry requires. Clients have to physically pick up the work. Also sending wip to people is hard for the above reasons and lower quality files need to stand in. Most of my income is derived from other means that don't require internet. I'm severely limited by what is available. I would love to expand and participate in my art community online in a more professional and profitable manner that would allow me to contribute to my community in a more economically abundant way.

Wendy Burton, Lecturer, University of the Fraser Valley, Hornby Island:

I am a remote worker. I teach courses online for my university. I have done so since 1999. Back in 1999, the technology of the courses and the internet capability (dial up) worked quite well. Since then, and since I am on the ""slow"" end of the island, the courses have become more graphics heavy and more interactive, so the lack of speed is creating a problem for those teaching and learning online. Many universities and colleges offer fully online courses, often with live chat features. Remote workers also include remote learners.

Sustainability

" *A healthy, sustainable community is rooted in a diversified, green, resilient economy. Connectivity is having a transformational impact across BC, enabling communities to re-envision and reinvent themselves, to diversify their economies in ways that respect, support and leverage community values. This leads communities to relevancy and competitive advantage. The need to adapt and innovate requires workforce attraction, support structures and programs for entrepreneurs and sensitivity to the pristine environments and responsible lifestyles that many entrepreneurs seek.* "

Doug Chinnery, Chief, Hornby Island Fire Department:

We currently use the internet for public messaging through web site, social media, mapping apps for addresses, training materials, training evaluations and online exams, secondary alerts for incident call-outs, we download dispatch logs to add to our incident reports after every call, webinars save significant dollars vs. sending someone off island for a day. We currently experience copper infrastructure maxed out and exhibiting dropouts when under heavy use. This causes loss of use and ip address changes which require us to reset login credentials. Lack of cell coverage in central corridor becoming a public safety hazard. The current infrastructure is unable to meet the uses we need, in the near future we anticipate increased use of web-based training in the form of webinars. 5G microcells in central transportation corridor would improve public safety by enabling communications, increase service levels would allow for better mapping apps on apparatus which would help us get to emergency scenes more quickly.

David Critchley, Denman Trustee, Islands Trust

Employment and economic activity opportunities are inherently limited on islands and my view is that these would be much improved if fast and reliable internet was broadly available. Telecommuting and small home-based businesses are a way of life on islands, including Denman. The modern importance of highspeed internet in these endeavours is self-evident.

Rebecca Raworth, Research Librarian, University of Victoria, Hornby Island:

I tried to do a 6-month sabbatical from Grassy Point a few years ago but as an academic I was unable to download all the articles I needed and do the online research required for my project (I work at UVic). I had to leave Hornby after the first month and do most of my sabbatical work back in Victoria. I had so looked forward to being able to work and live on Hornby for 6 continuous months so was very disappointed that the slow Internet speed was inadequate for my needs. This was after installing a $1500 satellite dish. Every time there was
wind or rain there'd be no service at all.

Paul Marmion, Engineer, Denman Island

I'm a semi-retired/ still practicing Professional Engineer who needs to use the internet for uploading and down loading large files, video/ cloud conferencing etc. The internet on Denman is unreliable, it goes down on a regular basis, this is frustrating and for me and costly in terms of lost time etc. Presently, we have to go back to our apartment in Vancouver or to my office in Vancouver to do any work that needs a usable internet service. This is expensive, time consuming and basically unworkable in the long term. I probably will have to make a choice of either leaving the Island or stop doing Island based consulting work.

Natalie Coupar, Digital Graphics Artist, Denman Island

I could get more work, have a more stable client base, I could have less stress and not have a risk of losing clients due to poor internet. Often clients need me to download their files and games, however with the current connection I can't do that, so I am losing work and experiencing business instability every day that passes. With each lost opportunity the thought of moving is growing, which means Denman loses a working class person.

Sue Hargrave, Employment Agent, Hornby Island:

From a part time resident point of view, at least 20 homes on Cape Gurney (furthest point of Whaling Station) are not able to receive Telus ADSL internet. They tell us the signal is not strong enough. I have tried to run my business from Hornby, & have home schooled my daughter from there (we are required to have Internet for home schooling in B.C.). I have tried to install satellite at the cost of $150/mo. Which is well beyond the norm. We welcome any changes that would help us stay on the Island for more duration.

Community Well-being

(description from the BC Ministry of Citizens Services "Digital Roadmap")

"   *Healthy and sustainable communities support quality of life. Citizen and business engagement are critical to shaping and building community wellbeing. Connected communities enable social inclusion and interconnectivity, and help citizens work together to shape a future identity. Building the social fabric that underpins connected communities requires a citizen-centric approach.* "

Michael Rapati, President, Arts Denman

As President of Arts Denman I would like to shed some light on our internet needs and woes on Denman Island. We use the internet to host our various websites, vet performers and presenters, receive payments, and communicate for the various committees; Denman Readers and Writers Festival, Concerts Denman, Summer Gallery, Denman Audio Arts Collective, Creative Threads Conspiracy, and Denman Early Music Festival

Managing and downloading content with our internet speed of 5.8 Mbps on a good moment is tiresome and often fails. Researching performers and presenters, reviewing their web sites and watching their videos is most often done with pauses waiting for rebuffing. A lot of volunteer time is wasted due to wait time and is a source of frustration and volunteer burnout.

Andrew Mark, Executive Director, Hornby Island Arts Council:

Connectivity is critical to the work of HIAC. It facilitates our day-to-day operations, logistical planning, artist communications and research. I'll add promotions (and increasingly so). We lost power to the trailer for an unplanned month this season and it created chaos: having no internet at the trailer was part of this.

We are part of a large digital arts partnership grant that will rely on connectivity if funded. As the Arts Centre grows into a regional association of arts organizations and infrastructure, it will work in partnership with other institutions to leverage attention to our position as a place in which to seek out the arts in Canada as a whole. We cannot be part of this network with poor connectivity. We see our studio tour (40 artists) and map going online for real-time interaction through app development. We also see that the digital arts are a fast-growing medium of expression and that real-time interactive installations that interface through the internet are already happening in arts spaces and doubtlessly will be important in the Arts Centre. Many of the pedagogical futures of the Arts Centre will rely on internet connectivity. We already see speakers coming to present material and having panic experiences with their presentations when they realize there is little or no internet available to them. Another example includes filmmakers at our film fest: we have been lucky to see them attend their films in person so far, however, things can change, and being able to skype in a filmmaker when conditions prevent an in-person delivery would be a critical relief for the festival. If current infrastructure is not going to be maintained, this would have a significant impact on our ability to function an organization, employer and provider of programming in our community.

Almost all our grant systems have moved online. Financial transactions are increasingly moving online as well: artists expect and need to be paid more promptly and transactions are taking place through a variety of connected technologies. Failing to keep up with efficiencies that allow our staff and board to focus on what matters will put us in a poor competitive position.

Peter Luckham, Chair, Islands Trust Council:

Improved, high-speed broadband internet connections for residents in rural and remote communities will in turn help to improve their quality of life. Improved connectivity can help community members to reduce their greenhouse gas emissions via reduced travel, access education and health services, participate in economic opportunities that are compatible with the conservation of island resources, and better participate in the decision-making processes of all levels of government.

Paul Marmion, Engineer, Denman Island:

I believe that the present internet situation on Denman is unsustainable and in itself is creating a 'have and have-not' situation (some people on the island have relatively fast service other people/ families have no service). This situation is especially harmful for young Denman'ites who want to have equal learning opportunities as their peers in Vancouver. And also, for people like us who may want to make a productive life for themselves on Denman.

CHFR 96.5, hornbyradio.com, Hornby Island:

Currently there's no internet at the Radio Studio. The Radio Society is considering internet streaming and an island-wide internet upgrade would improve the likelihood of the Radio being able stream radio. This would be significant for emergency services use, public announcements, news sharing, and public entertainment.

Etienne de Villiers, Architect/Builder, Denman Island:

For islanders with family & friends elsewhere in Canada and the world, faster internet would enable people to stay in touch using video calls. It's currently quite difficult to do so without lag here. It would be really nice for more isolated or housebound residents to be able to communicate reliably and easily with their support network.

Questions Posed and Community Responses, During Consultations

As part of the consultation program, questions were posed through Facebook forums, and many citizens responded. Following are some observations of these responses:

Q. As community members, what should we be paying attention to when it comes to connectivity?

A. 66% of the respondents to the questionnaire felt that "parity of access" was the most important. This is parity with other Canadians, and also parity with other properties on the Islands. A close second, with 60% feeling it is of priority was "speed". Clearly the respondents are supportive of working to have the Canadian standard of 50 Mbps download and 10 Mbps upload as the Hornby standard, as well.

- **How important is social media when communicating information to the public?**

- 87% of respondents replied important or very important to this question. The Hornby Community Connections Facebook page has 1600 members, making it a key communication tool for events, items of interest, and airing debate.

What role can connectivity play in building economic resiliency or driving investment in our local economy?

- Generally, connectivity is essential in building economic resiliency and encouraging a more diverse economy. The specifics included generating self-employment, attracting young families, education and skills development, accessing customers online, and helping money stay in the community.
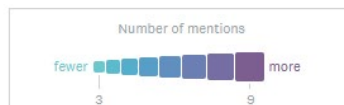
What role does connectivity play in our community well-being?

(A word cloud, from community members, when asked that question)

How has our community and your life changed with access to connectivity?

(A word cloud, from community members, when asked that question)

What attracts visitors to our community?

(A word cloud, from community members, when asked that question)

lifestyle people beauty community bike music trails food
beaches alternative natural beauty mountain biking
Nature great artists

Number of mentions

fewer ▢▢▢▢▢▢▢ more

3   21

APPENDIX E
COMMUNITY COMMENTS ABOUT THE INTERNET OBTAINED BY FACEBOOK CONSULTATIONS
ON HORNBY ISLAND

Hornby Island Community Economic Enhancement Corporation

December 3, 2019

HORNBY ISLAND FACEBOOK CONSULTATION			
Commentor		**Occupation**	**Comment**
First Name	**Surname**	**Profession**	
Jesse	Berg	ocean adventures tour operator	"It would help me for sure!"
Alsoon	Brine	commuting medical doctor	"The electronic medical files of all my patients are on-line. I do a couple of hours of work remotely every day that I'm not in the office in Courtenay. The speed is frustratingly slow, and I often lose everything I've recorded when the internet crashes."
Wendy	Burton	Educator	"I am a remote worker. I teach courses online for my university. I have done so since 1999. Back in 1999, the technology of the courses and the internet capability (dial up) worked quite well. Since then, and since I am on the "slow" end of the island, the courses have become more graphics heavy and more interactive, sothe lack of speed is creating a problem for those teaching and learning online." "Many universities and colleges offer fully online courses, often with live chat features. Remote workers also includes remote learners."
Rachelle	Chinnery	mixed media artist	"I did a graduate degree part-time online and it was very difficult uploading multi-page documents, as well as downloading multi-page research and library listings. That was three years ago. This spring I'm hoping to take more graduate courses and am somewhat dreading the download times." "For anyone teaching or studying through distance education, much better Internet is needed on our island. Studying online, too."
Paula	Courteau	Ferry crew	"I do some food ordering online for work, about twice a month. It goes very slowly and I would spend only half the hours with proper high-speed internet."
Al	Dickie	Senior management /manufacturing	"I'm a business owner and have to use the internet and phone to interact with my employees and customers. I currently use satellite internet as the existing TELUS internet does not reach my home. Hi speed internet was promised to all households in Canada in the last federal election. Another of the many promises not kept."

HORNBY ISLAND FACEBOOK CONSULTATION			
Commentor		**Occupation**	**Comment**
First Name	**Surname**	**Profession**	
Karen	Elder	Artist	"Doing marketing and exposure online as an artist through websites, google search, fb page, ordering supplies, using square and e-transfers, ordering prints, keeping up-to-date with art happenings on island and off, and on and on. Definitely helpful to have better internet!"
Aileen	Fearman	Farm/glamping	"I communicate with guests 99 percent through email, instagram, Facebook and our website booking app. From Jan to August about 4 hours per day. I need to be able to transfer large files and it's impossible through the current internet I use my phone as a hot spot!"
Catherine	Gray	Administrator, CHI	"My job as administrator at Conservancy Hornby Island requires me to use internet for research (many hours a week), newsletters, communicating with partner non-profits and board members, planning events such as our annual HerringFest, creating posters (I do this with an online tool), managing our website, posting Facebook news, etc, etc. The past few months I have wasted a lot of time rebooting my router several times per session due to the slow connection, and it often takes a long time for pages to load. I (and by extension our marine ecosystem) would truly benefit from improved internet connectivity and speed."
Susan	Hargrave	work from home Mom	"From a part time resident point of view.At least 20 homes on Cape Gurney (furthest point of Whaling Station) are not able to receive telus ADSL internet. They tell us the signal is not strong enough. I have tried to run my business from Hornby, & have home schooled my daughter from there (we are required to have Internet for home schooling in B.C.). I have tried to install satellite at the cost of $150/mo. Which is well beyond the norm. We welcome any changes that would help us stay on the Island for more duration."
John	Humphrey	Entrepreneur	"I'd like to hear a discussion about hot spots... Wondering what brands, and costs and if there are any issues I might not be aware of such as downtime or lack of customer service. I checked out a couple that people in the RV community are using and they didn't seem that much more expensive than what we're paying Telus."

HORNBY ISLAND FACEBOOK CONSULTATION			
Commentor		**Occupation**	**Comment**
First Name	**Surname**	**Profession**	
Dominique	Husereau	Job Shop	"Job searching online from home. Everything is online."
Ann	Kelly	ESL teacher	"I teach English as a second language on line 6 hrs a week.(China, Ontario, BC). Sometimes the connection is weak.. meaning the students miss part of the conversation. I would really benefit from improved WIFI speed and cell coverage as there is often a need to discuss things on the phone besides teaching over wifi. I know of four others who are educators who either work or teach online from Hornby part time. Three have struggled with the wifi speed." Difficulty of access to emergency health services via cell phone...I tried to call the clinic on call line and could not get cell call connection where I was living and had to drive to the Coop Store to get a cell signal. Not good if you are bleeding! Don't know about 911 calls."
Kim	Lake	Graphic artist	I thought I'd contribute to why better internet is of benefit to me as a hornby island resident and artist. I'm primarily a digital illustrator and graphic art practitioner. I don't work at this full time or even part-time as I'm limited to a local clientele due to upload issues. I can't send large files that my industry requires. Clients have to physically pick up the work. Also sending wip to people is hard for the above reasons and lower quality files need to stand in. Most of my income is derived from other means that don't require internet. I'm severely limited by what is available. I would love to expand and participate in my art community online in a more professional and profitable manner that would allow me to contribute to my community in a more economically abundant way. I hope this helps.
Sasha	LeBaron	virtual reality testing and production	Do we need improved internet? "Yes Yes Yes! And I would pay up to $60/mo. for it"
John	McLachlan	musician & B.C.Arts Council adviser	Recording and performing artist. "Improved internet would be very helpful. It's an essential part of being able to make a living here."

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Commentor		**Occupation**	**Comment**
First Name	**Surname**	**Profession**	
Peter	Panjoyah	Entrepreneur	"Yes, we work online professionally across several different service offerings. And although our speed is good atm, we won't always be living here.
Shawn	Pederson	Entrepreneur	Live on Anderson Drive. "My desire to convert from part-time to fulltime residency"
Don	Pederson	photographer	"Better internet would certainly make uploading large files (photographs) for clients or printers much easier. Some days here it is simply not possible and on good days it is just very slow."
Mark	Phillips	Business Development for a mortgage lender	However, my wife is a landscape designer and she requires almost constant connectivity. If she starts working from there next summer we might just be in need of a strong internet connection, so in her case better internet would allow her to be there more often for sure."
Rebecca D.	Raworth	Research Librarian /U.Vic.	"I tried to do a 6 month sabbatical from Grassy Point a few years ago but as an academic I was unable to download all the articles I needed and do the online research required for my project. (I work at UVic.) I had to leave Hornby after the first month and do most of my sabbatical work back in Victoria. I had so looked forward to being able to work and live on Hornby for 6 continuous months so was very disappointed that the slow Internet speed was inadequate for my needs.This was after installing a $1500 satellite dish. Every time there was wind or rain there'd be no service at all."
Stacey	Reynauld	Instructor of Business & Marketing at BCIT and SFU. Also, a student doing a Masters of Education.	"I work 100% online. I'm an instructor. And I'm doing graduate studies 100% online. I teach business and marketing at B.C.I.T. and S.F.U. online. I'm doing my MEd in mindfulness-based teaching and learning. I use wi-fi calling on my cell phone. I use Virgin mobile, and Telus internet. I live at Grassy Point. No cell coverage until around the Credit Union.
Katherine	Ronan	Architect	"My internet is very slow. Download around 3 Mbps, upload around .5 mbps, slow internet speed interferes with my architectural work"
Zsofin	Sheehy	videotographer	Wandering Eye Mediahas to go to a friend's house to upload any content needing sending.

HORNBY ISLAND FACEBOOK CONSULTATION			
Commentor		**Occupation**	**Comment**
First Name	**Surname**	**Profession**	
Susie		movie industry product placement advertising	Download (mbps)Telus - 3.44 / Xplornet 25 for Business - 18.86 - note these flux down in the evening Upload (mbps)Telus - 0.54 / Xplornet 25 for Business - 1.32 - note these flux down in the evening
Michael John	Thompson	Online book store & homeschooling parent	"100% online; working on-line full-time, supporting a family of 5." "Along with our on-line business, we have 2 remote learners. Our older children take ASL courses on-line, as well as doing mathematics programs; also, one is partially home schooled and we do on-line filing of learning reports; another is in high school and does many writing projects, etc on-line for her regular high school classes. One can likely consider all the kids who go to Vanier as being remote learners due to having to access course content on-line." Also we home schooled Ursula, Emily and Arwen for many years; and we will be home-schooling Ronja in a few years. On-line access, and fast on-line access, is vital to the learning environment today.
Henry	Towslanger	Engineering	Poor internet on Anderson Drive."I work 1-2 days a week from home in the winter, and 3-4 days week in the summer. Better connection would improve my performance and connect to colleagues."
Sara	Vipond	artist & educator	Poor internet on Anderson Drive. "I work 1-2 days a week from home in the winter, and 3-4 days week in the summer. Better connection would improve my performance and connect to colleagues."
Jeff	Zamluk	Contract manufacturer	manufactures unique marketing materials