



SC Broadband Advisory Council

Enabling South Carolinians to Thrive in the Global Digital Economy

South Carolina Office of Regulatory Staff | July 18, 2023

Agenda

Welcome / Roll Call
Review / Approve Minutes
Introductions

Jim Stritzinger, Co-Chair
Anna Berger, Co-Chair

SC Broadband Office Update

Jim Stritzinger, ORS

BEAD Infrastructure / Digital Equity Planning

Team

Other Business

All

Next Meeting – Tuesday, Oct. 10, 2023

Adjourn







All

South Carolina

Majority Best Available Technology

March 31, 2023

Best Available Technology (type | speed)

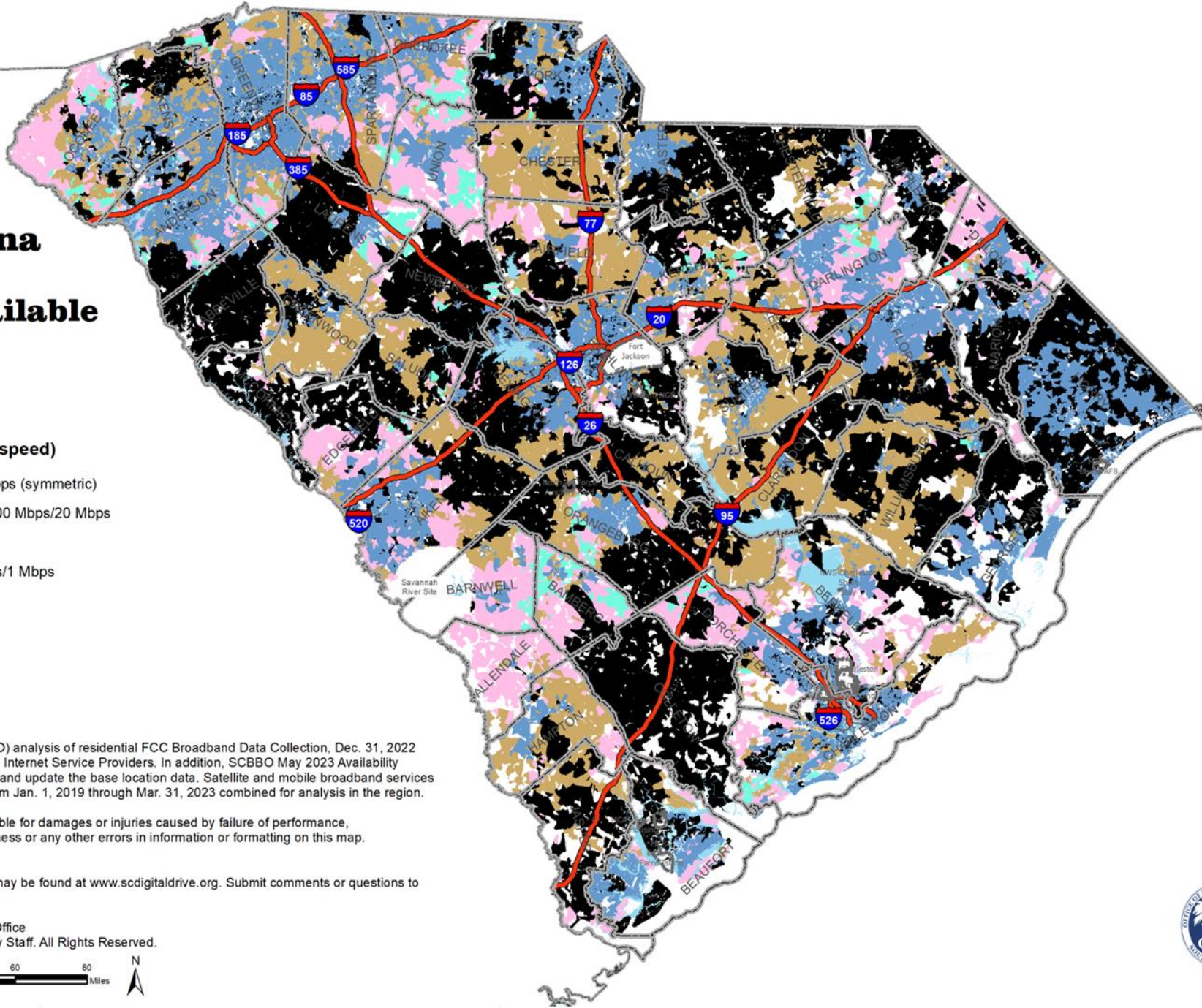
-  Fiber | Speeds \geq 100 Mbps/100 Mbps (symmetric)
-  Cable (DOCSIS X.X) | Speeds \geq 100 Mbps/20 Mbps
-  xDSL | Speeds $<$ 25 Mbps/3 Mbps
-  Fixed Wireless | Speeds \geq 10 Mbps/1 Mbps
-  No Internet Service Available
-  Zero Households

Data Sources: Based on SC Broadband Office (SCBBO) analysis of residential FCC Broadband Data Collection, Dec. 31, 2022 submissions that were provided directly to our office by Internet Service Providers. In addition, SCBBO May 2023 Availability Challenge information has also been used to augment and update the base location data. Satellite and mobile broadband services are excluded. Ookla® Speedtest Intelligence® data from Jan. 1, 2019 through Mar. 31, 2023 combined for analysis in the region.

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Additional broadband information may be found at www.scdigitaldrive.org. Submit comments or questions to maps@ors.sc.gov

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BROADBAND OFFICE

South Carolina

Areas of Need

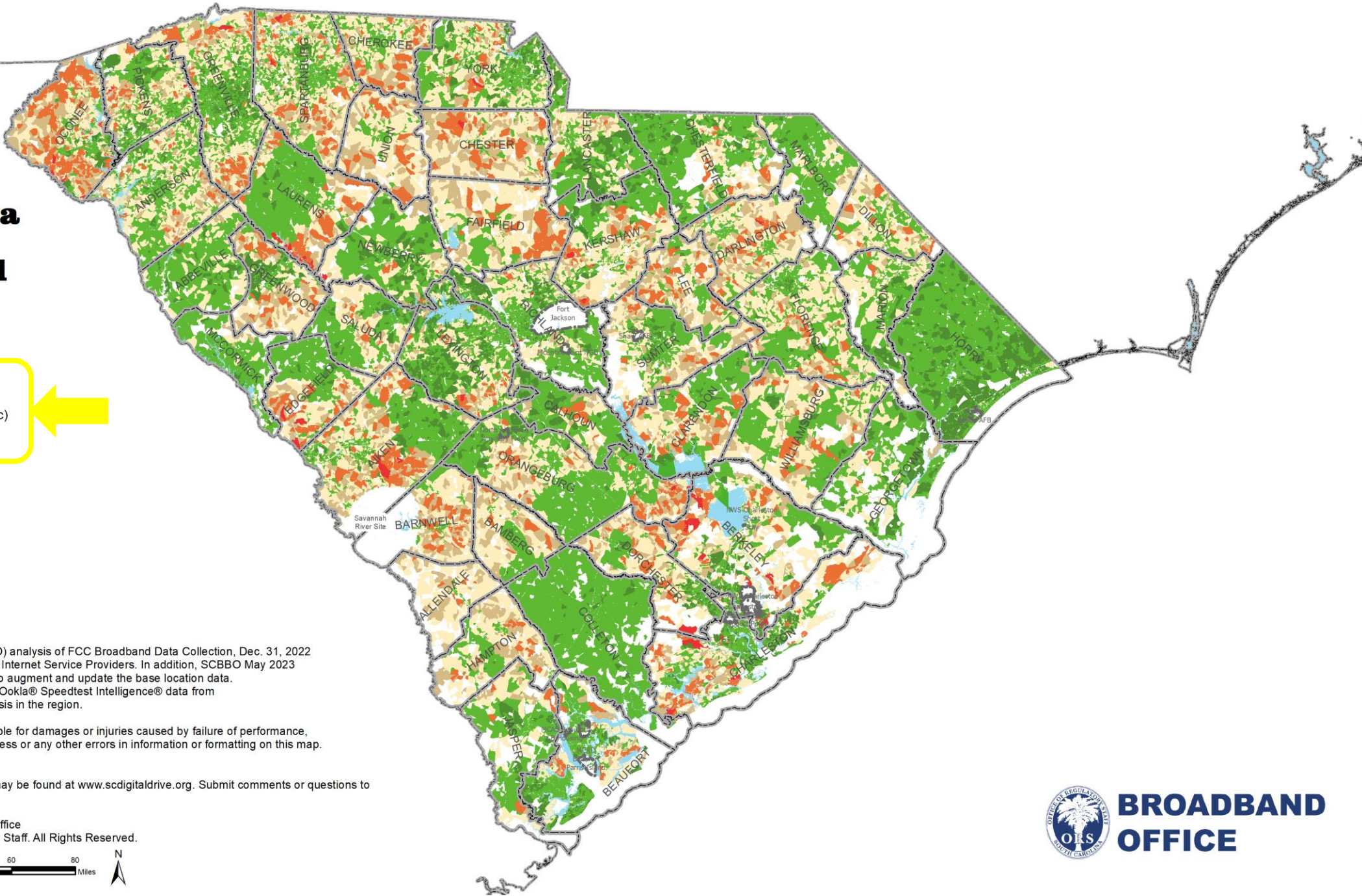
March 31, 2023

Speed Tiers (download / upload)

- >= 100 Mbps / 100 Mbps (symmetric)
- >= 100 Mbps / 20 Mbps

Unserved Housing Units

- 100 or more
- 26 - 99
- 11 - 25
- 1 - 10
- Zero



Data Sources: Based on SC Broadband Office (SCBBO) analysis of FCC Broadband Data Collection, Dec. 31, 2022 submissions that were provided directly to our office by Internet Service Providers. In addition, SCBBO May 2023 Availability Challenge information has also been used to augment and update the base location data. Satellite and mobile broadband services are excluded. Ookla® Speedtest Intelligence® data from Jan. 1, 2019 through Mar. 31, 2023 combined for analysis in the region.

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BROADBAND OFFICE

South Carolina

Planning

December 31, 2024

Speed Tiers (download / upload)

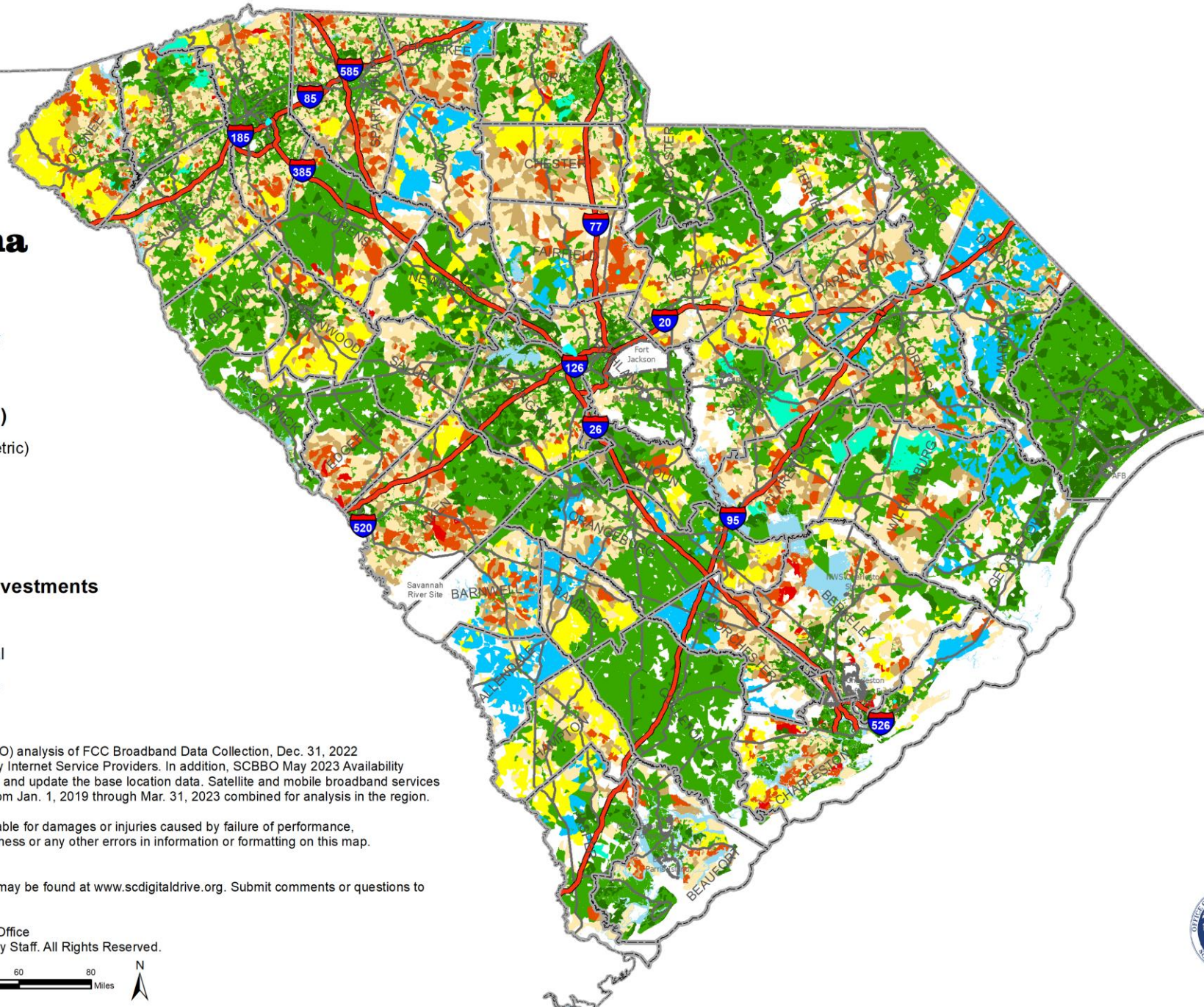
- >= 100 Mbps / 100 Mbps (symmetric)
- >= 100 Mbps / 20 Mbps

Unserved Housing Units

- 100 or More
- 26 - 99
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- 1 - 10
- Zero

Managed Investments

- State
- Federal
- Private

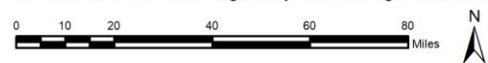


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BROADBAND OFFICE

South Carolina Statewide Statistics

March 31, 2023



Population

Population estimates are calculated by multiplying Dec. 2022 FCC Broadband Servicable Locations (BSL) times an approximate residents per BSL.

Public K-12

K-12 student data reflects the subset of public school students which have been geocoded as of September 30, 2022. Student data was provided by the SC Department of Education.

Residential BSL Units

A Residential Broadband Servicable Location (BSL) is a house, an apartment, a mobile home, a group of rooms, or a single room that is occupied (or if vacant, is intended for occupancy) as separate living quarters. Separate living quarters are those in which the occupants live and eat separately from any other persons in the building and which have direct access from the outside of the building or through a common hall. Dec. 2022 FCC BSL data is used in all calculations.

Qualified Residential BSL Units

Qualified BSLs are located within Difficult Development Areas (Qualified Census Tracts) as determined by US Housing and Urban Development utilizing Census 2010 format. Census 2020 translation was done by the SC Broadband Office (SCBBO).

ACP

The Affordable Connectivity Program (ACP) is an FCC benefit program that helps ensure that households can afford the broadband they need for work, school, healthcare and more.

Data Sources: Based on SC Broadband Office (SCBBO) analysis of residential FCC Broadband Data Collection, Dec. 31, 2022 submissions that were provided directly to our office by Internet Service Providers. In addition, SCBBO May 2023 Availability Challenge information has also been used to augment and update the base location data. Satellite and mobile broadband services are excluded. Ookla® Speedtest Intelligence® data from Jan. 1, 2019 through Mar. 31, 2023 combined for analysis in the region. ACP eligibility information provided by Education SuperHighway and enrollment reported by the Universal Service Administrative Company (USAC) through March 2022.

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US Census	Population		Residential BSL	
2010	4,625,364		2,137,683	
2020	5,118,425	10.7%	2,344,963	9.7%
March 31, 2023	5,282,634	3.2%	2,488,256	6.1%

CURRENT	Current Below 100↓ Mbps Download / 20↑ Mbps Upload							
March 31, 2023	Population		Public K-12		Res BSL		Qual BSL	
	394,419	7.7%	31,316	4.4%	191,548	7.7%	28,485	14.9%

ACCESS							
Fiber		Cable		Copper			
1,257,047	50.5%	2,170,076	87.2%	2,026,228	81.4%		

ADOPTION							
Fiber		Cable		Copper		Fixed Wireless	
461,307	18.5%	1,197,234	48.1%	241,831	9.7%	2,428	0.1%

ACP Enrollment							
Subscribers		Service		Device		Devices	
324,332	37.1%	\$8,664,711		\$723,012		7,442	

INVESTMENTS managed by:	Projected Investment Impact							
	Population		Public K-12		Res BSL		Qual BSL	
Federal	26,581		3,959		13,448		4,169	
State	85,868		12,003		42,687		5,322	
Private	3,607		470		1,782		107	
Total	116,056		16,432		57,917		9,598	

FUTURE	Remaining Below 100↓ Mbps Download / 20↑ Mbps Upload							
December 31, 2024	Population		Public K-12		Res BSL		Qual BSL	
	278,363	5.4%	14,884		133,631	5.4%	18,887	



SOUTH CAROLINA DIGITAL DRIVE

Tools and resources to inform consumers and stakeholders

Don't have access to internet? Take the [I Need Internet](#) survey

Estimated Current Total Housing Units

With At Least

100↓ Mbps / 20↑ Mbps Service

2,296,716*

Estimated Current Total Housing Units

Without

100↓ Mbps / 20↑ Mbps Service

191,548*

Estimated Current Total Housing Units

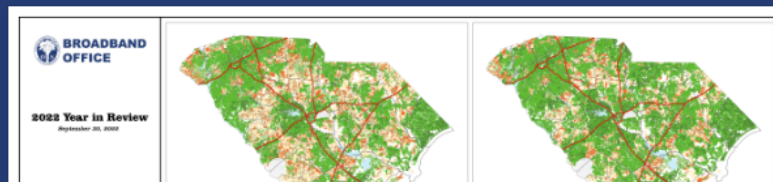
Funded Remaining To Be Built

100↓ Mbps / 20↑ Mbps Service

57,917*

**Data current as of March 31st, 2023*

South Carolina Broadband Office 2022 Accomplishments



SC Broadband Office Annual Report (2022)

AMERICAN RESCUE PLAN ACT

Act 244 (H. 4408) \$400 Million for SC Broadband Infrastructure

Enacted
May 13, 2022

State Fiscal
Recovery Fund

- \$214.2 Million

Capital
Projects Fund

- \$185.8 Million

The funds in the ARPA Broadband Account shall be used to expand broadband infrastructure to households, businesses, and communities in the State that are unserved or underserved by broadband services.

ARPA Capital Projects Fund



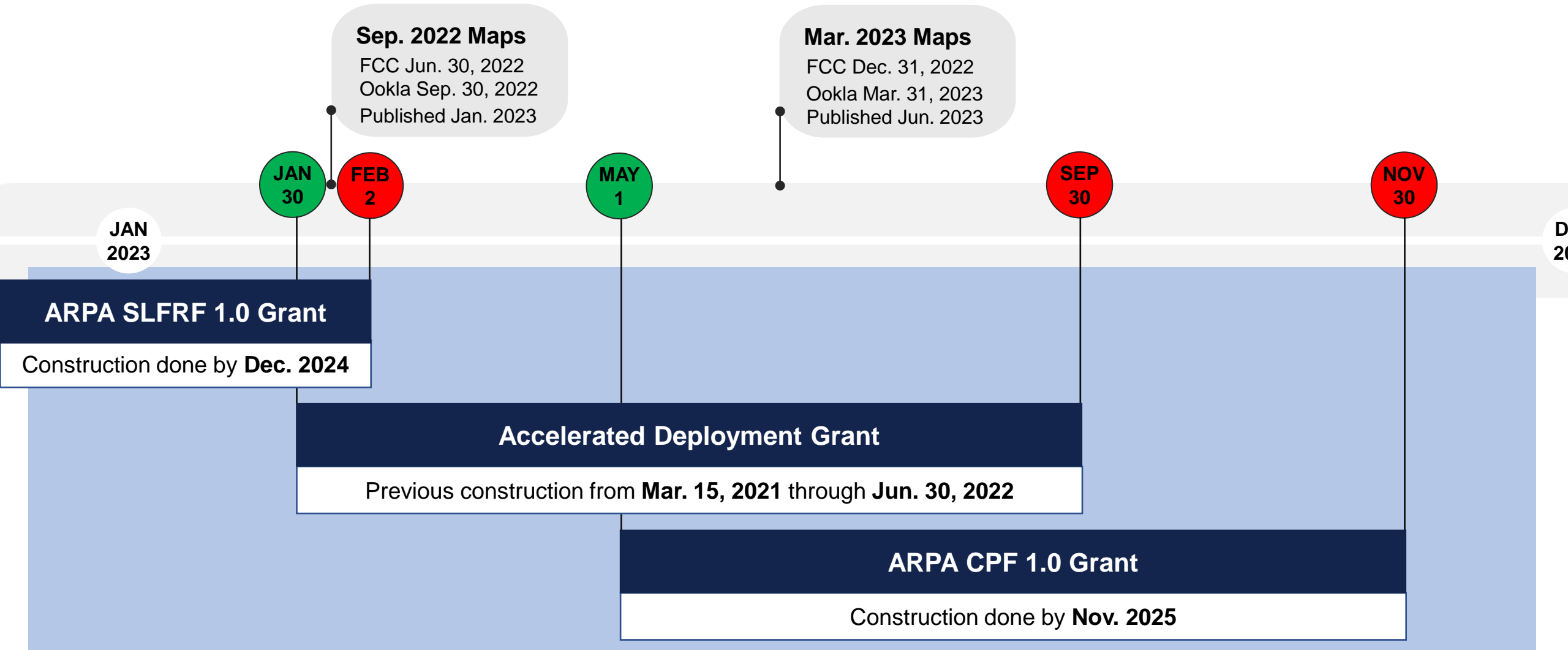
Unserved 2020 Census Blocks with:

- 1) More than 20 public K-12 student households; **or,**
- 2) Difficult Development Areas (HUD); **or,**
- 3) No Internet Service Provider (ISP); **or,**
- 4) **Underserved Main Street Communities**

Requires 100 Mbps Symmetric (100/100)

Source: H.4408, Section 9: Priority must be given to unserved areas with no current Internet Service Provider, Difficult Development Areas as identified by U.S. Housing and Urban Development, and census blocks that have a high concentration of unserved public K-12 student households as documented by the South Carolina Department of Education. Capital Projects Fund plan approved by US Treasury on March 7, 2023.

2023 SC BROADBAND GRANT PROGRAMS



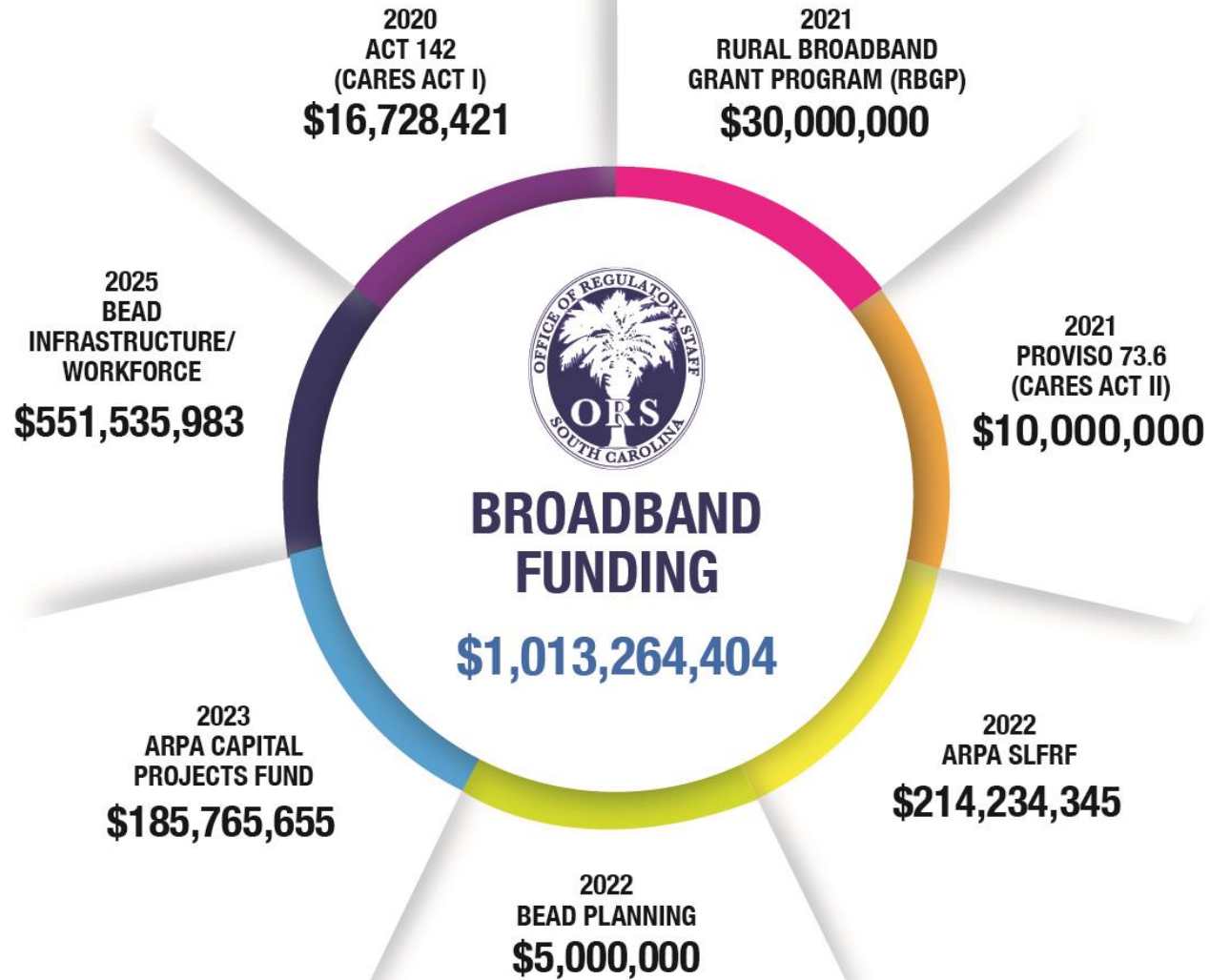
* All dates are subject to change without notice.

ARPA SLFRF Accelerated Deployment Grant

- Awarding up to \$25,193,089 across 10 ISPs
- Providing 50% match for work in unserved areas as of Sep. 2021
- Funding across 25 counties

ARPA CPF 1.0 Grant Applications

- Applications due Jul. 17, 2023
- Will award a portion of \$185.8M CPF fund allocation



5-Year Action Plan, Digital Equity Plan & Initial Proposal



- ▶ **5-Year Action Plan / Initial Proposal:** To be eligible for the \$42.5b Broadband Equity, Access and Deployment (BEAD) funding program, an Eligible Entity that receives Initial Planning Funds (as South Carolina did on December 8, 2022) must submit a Five-Year Action Plan. An Initial Proposal must be submitted later (see below for dates). While there is overlap between the two documents, and the Five-Year Action Plan will inform the Initial Proposal, they also cover different activities and sections, as outlined below.
- ▶ **Digital Equity Plan:** For those states seeking to access the remaining State Digital Equity Grant Program funds (totaling \$2.69b), a Digital Equity Plan will be a key component of any application.

These three documents will inform a more concise strategic broadband summary which will be submitted to the SC General Assembly and made public.

	5-Year Action Plan	Digital Equity Plan	Initial Proposal
Overview	Establishes State's broadband goals and priorities and serves as a comprehensive needs assessment that will inform future plans such as the Initial and Final Proposals.	Establishes a State's vision, goals and strategy for digital equity, with broadband affordability and adoption as key tenets.	Establishes how the State will ensure that every resident has access to reliable, affordable, high-speed broadband and the competitive process for selecting subgrantees.
Key Activities	<ul style="list-style-type: none"> • Documenting resources available • Needs and gaps assessment • Evaluating current and future state • Identifying priorities and activities 	<ul style="list-style-type: none"> • Stakeholder outreach • Documenting assets and existing plans • Needs assessment (emphasis on covered populations) 	<ul style="list-style-type: none"> • Outline long-term objectives • Describe how Community Anchor Institutions were determined • Describe challenge process • Provide climate threat assessment
Key Sections	<ul style="list-style-type: none"> • Vision, goals and objectives • Existing programs • Partnerships, asset inventory • Obstacles and barriers • Key execution strategies 	<ul style="list-style-type: none"> • Strategy and objectives • Asset inventory • Coordination and outreach strategy • Implementation strategy 	<ul style="list-style-type: none"> • A template has not been released yet, but key sections will likely cover the activities above and intended use of the first 20% of funding, subgrantee selection process, etc.
Submittal Date	270 days after receipt of planning funds August 28, 2023	One year after receipt of planning funds November 30, 2023	180 days after NOAA of BEAD program Dec 27th, 2023²

¹ Digital Equity Planning funds were received on December 1, 2022

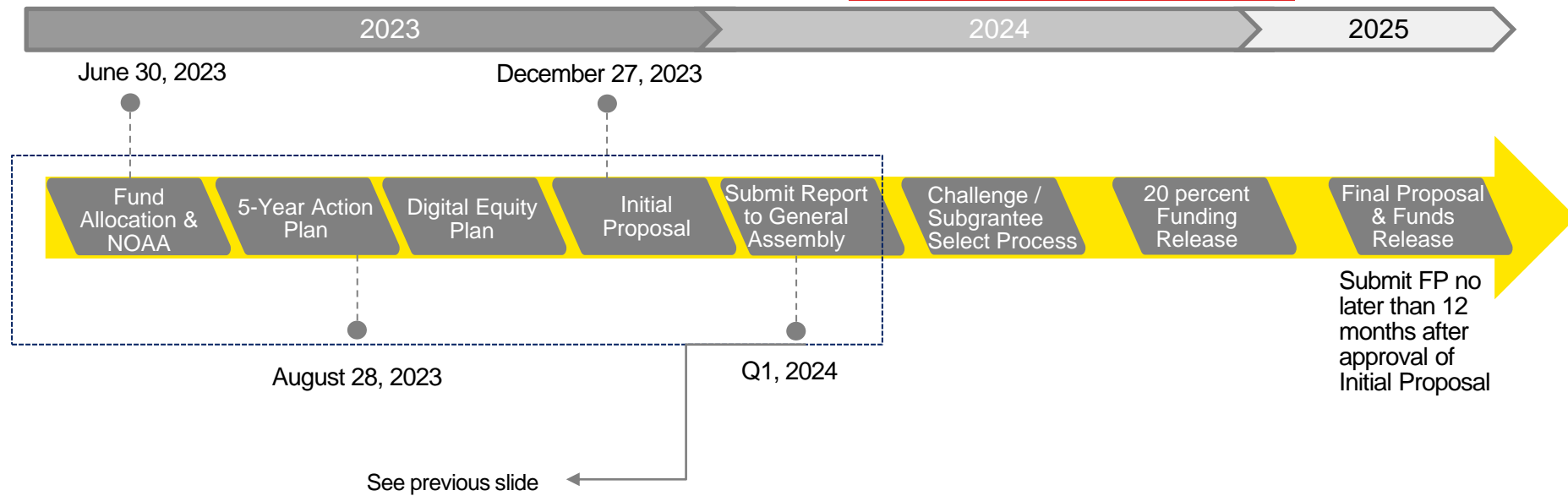
² Notice of Available Amounts (NOAA) is expected June 30th, 2023

Timelines



- Once the Five-Year-Action, Digital Equity, Initial Proposal and General Assembly Report are submitted in 2023, future activities include conducting a challenge process, the release of 20% of the total funds, the submittal of a Final Proposal, and finally the release of the full amount of BEAD funding upon approval of the Final Proposal.

Note that Digital Equity Capacity and Competitive Grant Program (which accounts for \$2.69b) is expected to launch in 2024





Thank you!

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Mobile: (803) 315-4449



Get
Connected
SC

BETTER
INTERNET
FOR A
BETTER
SOUTH
CAROLINA

BETTER-INTERNET SURVEY

Nabil Natafqi, PhD, MPH | Assistant Professor, USC
Julie Moreland | CEO, Vizbii Technologies, Inc.

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UNIVERSITY OF
South Carolina



**BROADBAND
OFFICE**

OUTLINE

- **Background:** What did we do?
- **Approach:** How did we do it?
- **Results:** What did we find?
- **Future Directions:** What's next?

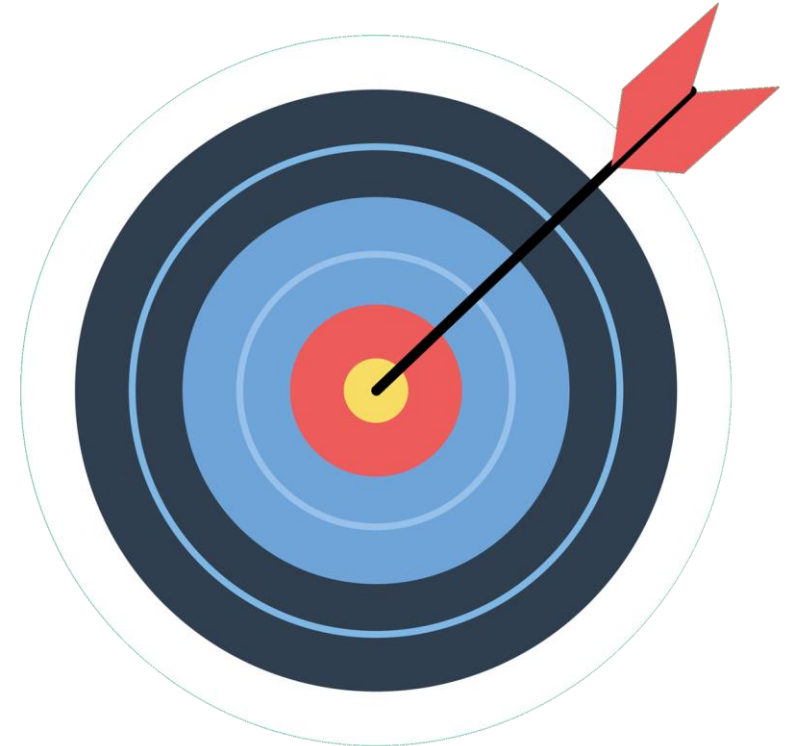
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BACKGROUND

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OUR OBJECTIVES

- Identify areas of greatest need to help bring reliable, high-speed internet to every South Carolinian
- Provide survey design, execution, data collection, and analysis/reporting that fulfill the research requirements for SCBBO and SCDE



KEY PARTNERS



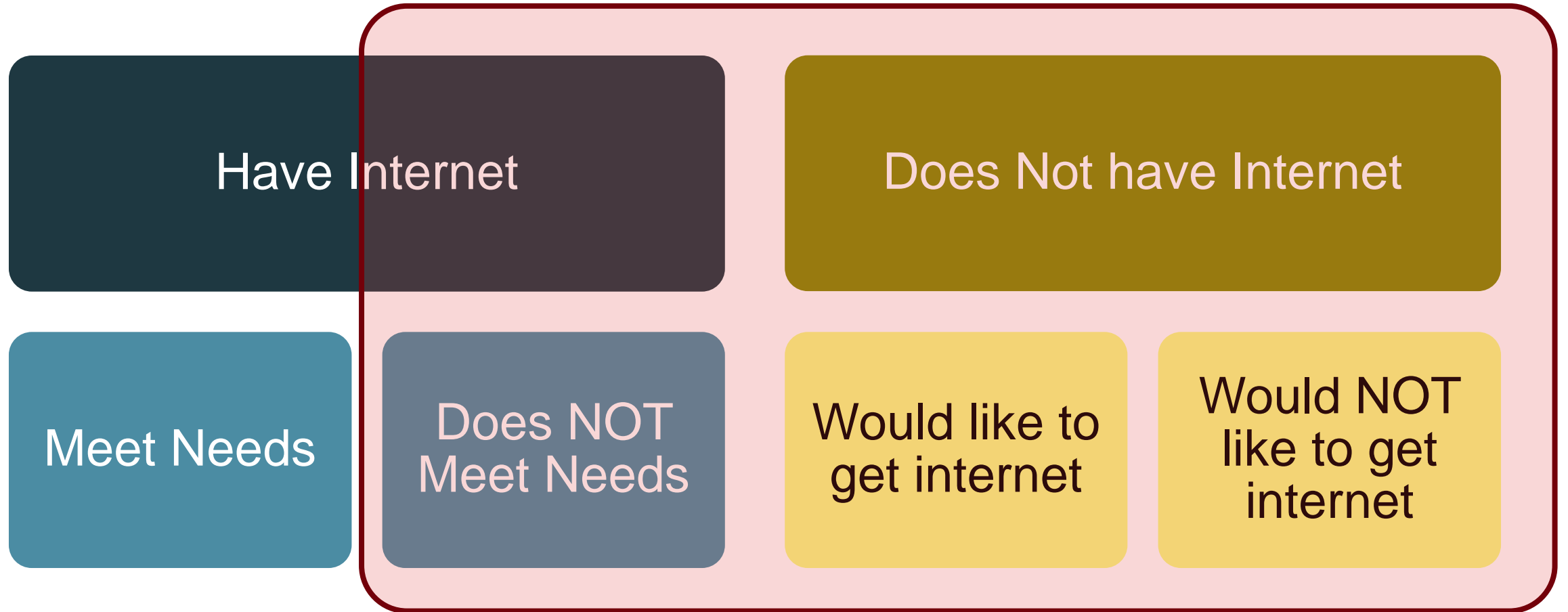
**BROADBAND
OFFICE**



APPROACH

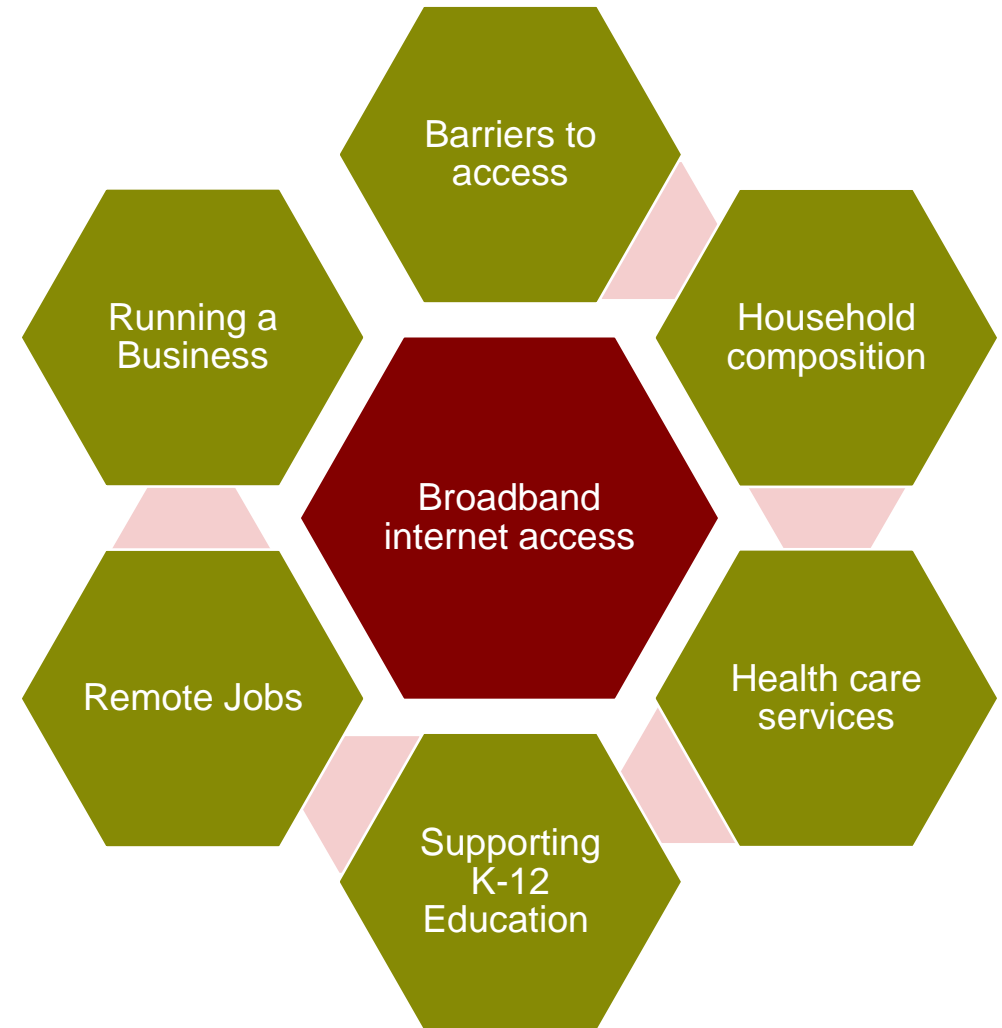
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FOUR TARGET GROUPS

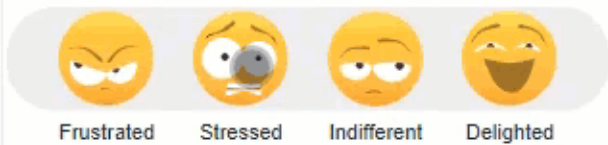


SURVEY DOMAINS

- Survey design focused on capturing barriers to high-speed internet access and adoption whether related to geography, cost, device/service accessibility, or otherwise.
- How the lack of internet influences the healthcare system, economic stability, education, food, community & social contexts, and physical environment.



How do you feel about the current options for connecting your home to the internet?



Frustrated Stressed Indifferent Delighted

Select the graphic above that best represents how you feel.

Want to explain that feeling?

Next



Get Connected SC

Better-Internet Survey

Keep going! You're approaching the halfway point and helping to build a better internet in South Carolina with each response.

People who participate in certain government programs might be eligible for \$30 per month financial assistance to pay for internet service through the Affordable Connectivity Program (ACP). Are you familiar with this program?

- Yes
- No

Previous

Next



SURVEY LAUNCH

- **Better Internet Survey** went live to the public on February 21st, 2023
- The survey is available in English and Spanish and there are paper, IVR, and online versions.



MARKETING CAMPAIGN



Five minutes
CAN IMPROVE YOUR INTERNET

TAKE THE
**Better-Internet
Survey**



Scan QR to take
the
“**Better Internet
Survey**”



YOUR INPUT = BETTER INTERNET

DATA COLLECTION



South Carolina

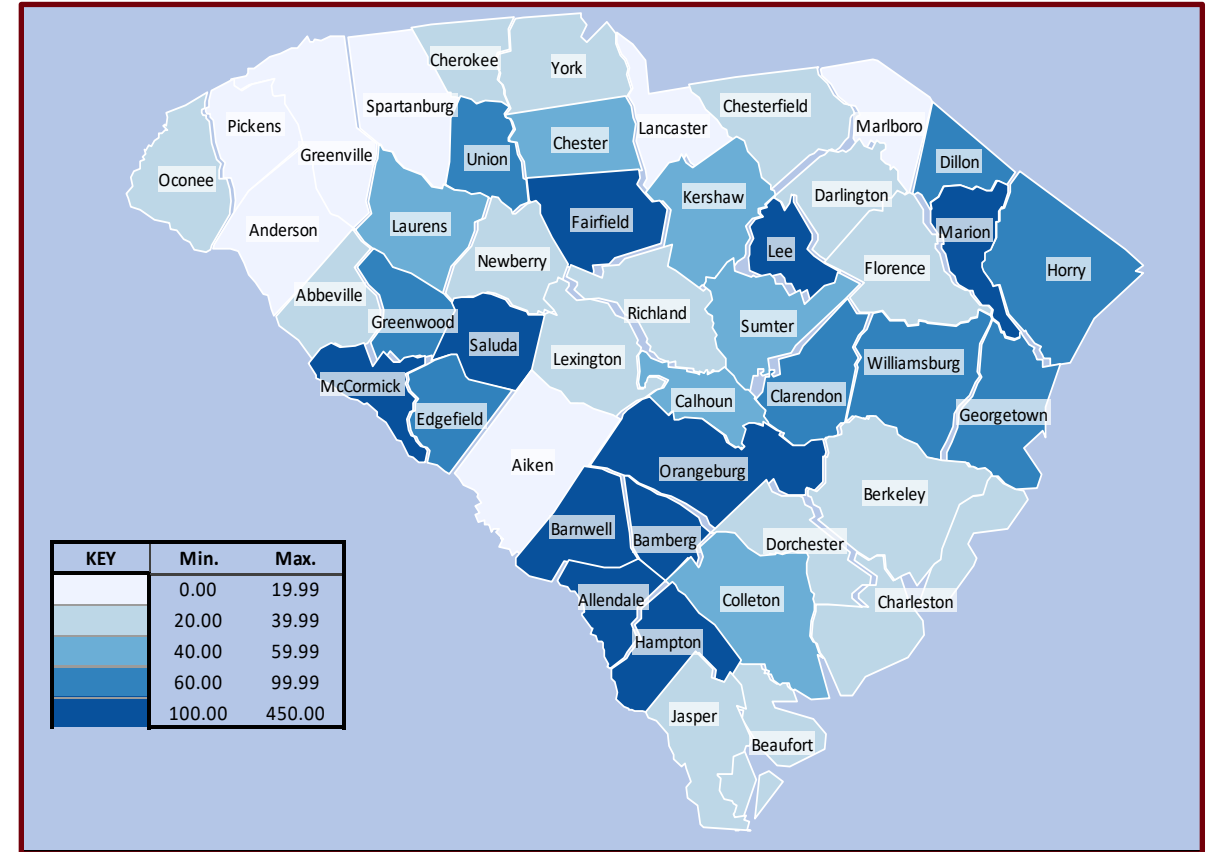
RESULTS

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RESPONSE RATE

- All Survey Responses: **18,481**
 - 94 per 10,000 household
 - 36 per 10,000 resident
- % Reached last question: **14,823 (80.3%)**
- % Complete: **13,024 (70.5%)**
- Spanish: **3.6%**

SC Region	%
Lowcountry	30
Midlands	25.5
PeeDee	27.2
Upstate	17.3



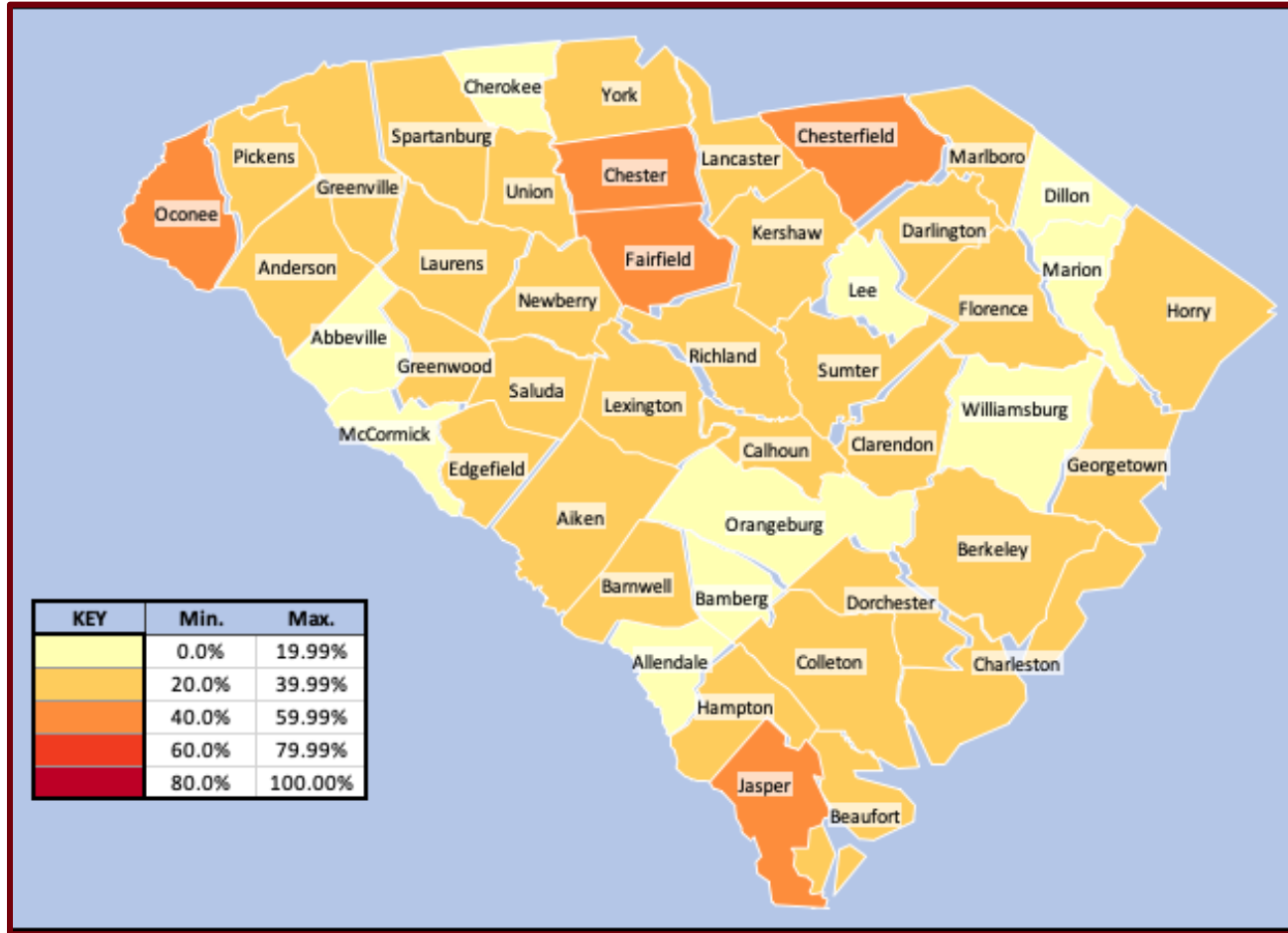
Response Rate (per 10,000) of population per county

UNDER/UNSERVED COMMUNITY

51%

N=16,126	Has Internet: Needs Met	Has Internet: Needs Not Met	No Internet or Cell Only: Wants It	No Internet or Cell Only: Does not want it
Count (n)	7,355	4,341	3,874	556
Percent (%)	45.6%	26.9%	24.0%	3.5%

GEOGRAPHY OF UNDERSERVED COMMUNITIES



BROADBAND OFFICE

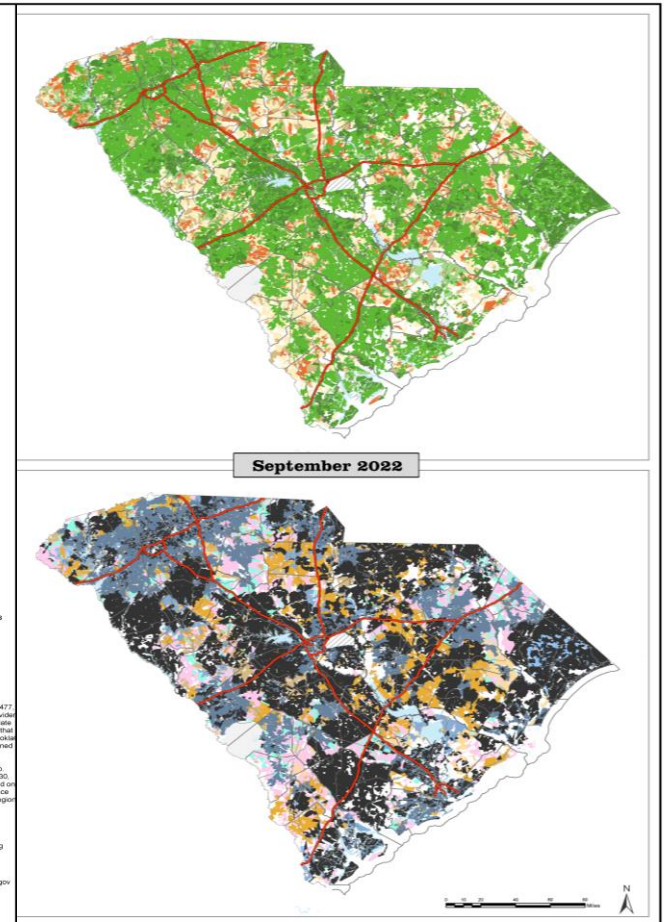
2022 Year in Review
September 30, 2022

Served and Unserved Areas
Speed Tiers (download / upload)
 - Green: >= 100 Mbps / 100 Mbps (symmetric)
 - Light Green: >= 100 Mbps / 20 Mbps
 - Yellow-Green: >= 25 Mbps / 3 Mbps

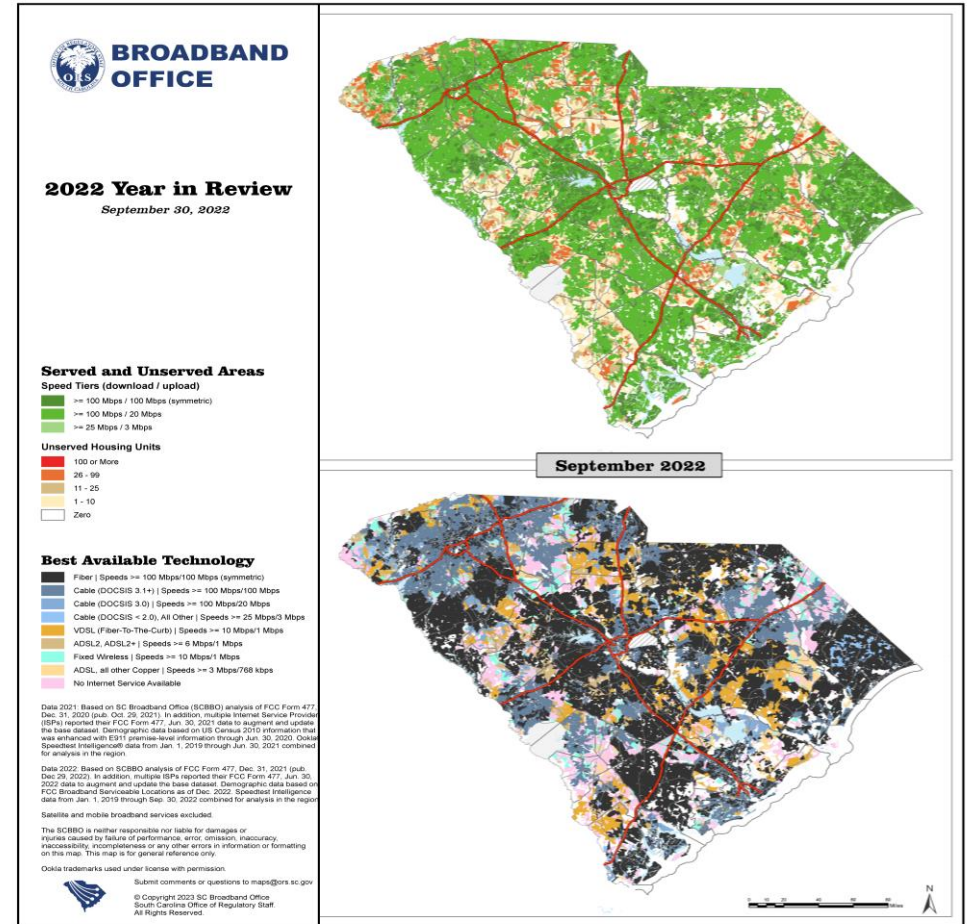
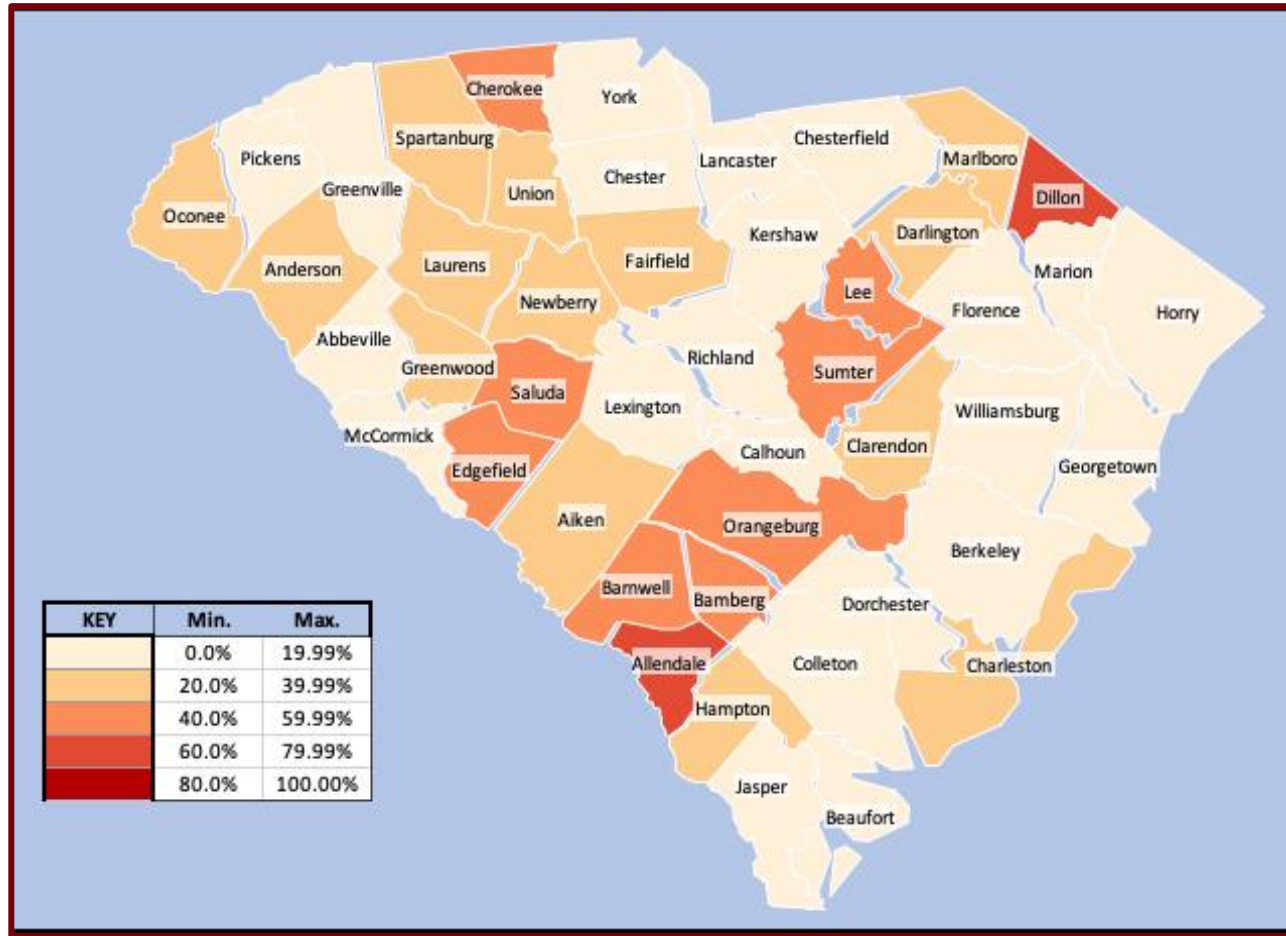
Unserved Housing Units
 - Red: 100 or More
 - Orange: 26 - 99
 - Yellow: 11 - 25
 - Light Yellow: 1 - 10
 - White: Zero

Best Available Technology
 - Fiber (Speeds >= 100 Mbps/100 Mbps (symmetric))
 - Cable (DOCSIS 3.1+) | Speeds >= 100 Mbps/20 Mbps
 - Cable (DOCSIS 3.0) | Speeds >= 100 Mbps/20 Mbps
 - Cable (DOCSIS < 2.0, All Other) | Speeds >= 25 Mbps/3 Mbps
 - VDSL (Fiber-to-the-Curb) | Speeds >= 10 Mbps/1 Mbps
 - ADSL2, ADSL2+ | Speeds >= 6 Mbps/1 Mbps
 - Fixed Wireless | Speeds >= 10 Mbps/1 Mbps
 - ADSL, all other Copper | Speeds >= 3 Mbps/768 kbps
 - No Internet Service Available

Date 2021: Based on SC Broadband Office (SCBBO) analysis of FCC Form 477, Dec. 31, 2020 (pub. Oct. 29, 2021). In addition, multiple Internet Service Provider (ISP) reported their FCC Form 477, Jun. 30, 2021 data to augment and update the base dataset. Demographic data based on US Census 2010 information that was enhanced with ESRI geocode-level information through Jun. 30, 2020. Census Speedtest Intelligence data from Jan. 1, 2019 through Jun. 30, 2021 combined for analysis in the report.
 Date 2022: Based on SCBBO analysis of FCC Form 477, Dec. 31, 2021 (pub. Dec. 29, 2022). In addition, multiple ISPs reported their FCC Form 477, Jun. 30, 2022 data to augment and update the base dataset. Demographic data based on FCC Broadband Serviceable Locations as of Dec. 2022. Speedtest Intelligence data from Jan. 1, 2019 through Sep. 30, 2022 combined for analysis in the report.
 Satellite and mobile broadband services excluded.
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GEOGRAPHY OF UNSERVED COMMUNITIES

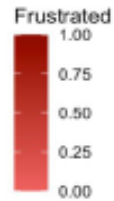


Overview: Feeling About Options

How do you feel about the current options for connecting your home to the internet?



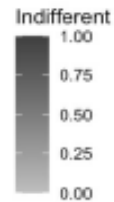
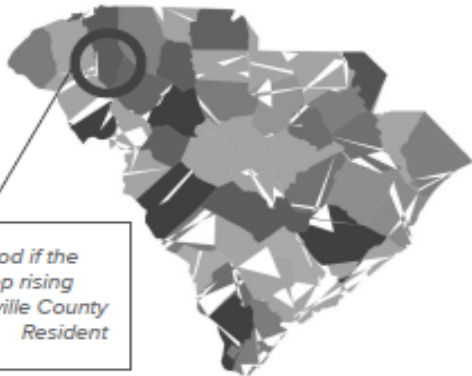
No good options. Verizon 4g is weak even when closer to a tower. Att home Internet is terrible. Not connecting and not offering fiber optics. It's almost a Monopoly on the people's money just to get a connection with horrendous speeds.
Marlboro County Resident



n = 3825 ; 37.68%

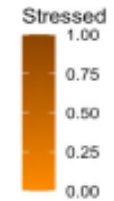
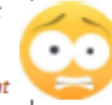


It would be good if the cost didn't keep rising
Greenville County Resident



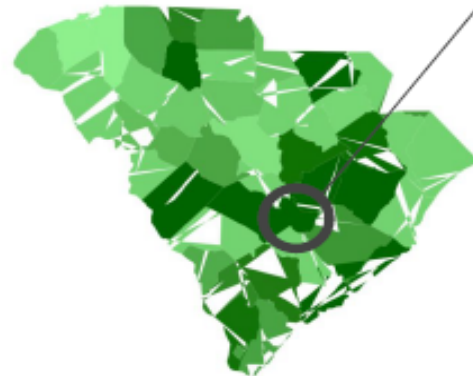
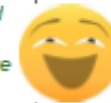
n = 2535 ; 24.57%

I pay \$210.00 a month for service that is no good but I have to have the Internet to perform some of my task at work and it keeps me on my toes wondering if I'll lose my job
Edgefield County Resident



n = 1391 ; 13.23%

We waited for years to have reliable internet with a fast enough speed to stream content. Finally, NTI Net installed fiber optic past our house about 18 months ago. Now we are able to operate wireless security cameras outside our home, stream TV, webcams.
Orangeburg County Resident.



n = 2286 ; 22.55%

50% expressed 'negative' feeling (Frustrated or Stressed) regarding their options

And these negative feelings are felt more intensely at .76 and .70 respectively.

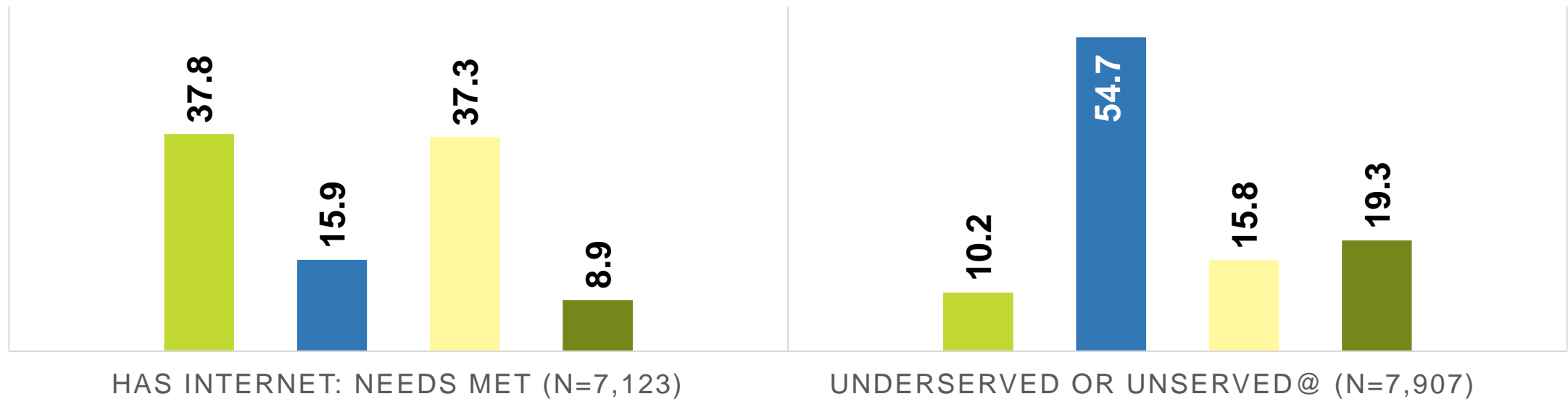
*Based on the analysis of Vizbii team of a subset of the data; slide by Vizbii team

FEELING ABOUT OPTIONS

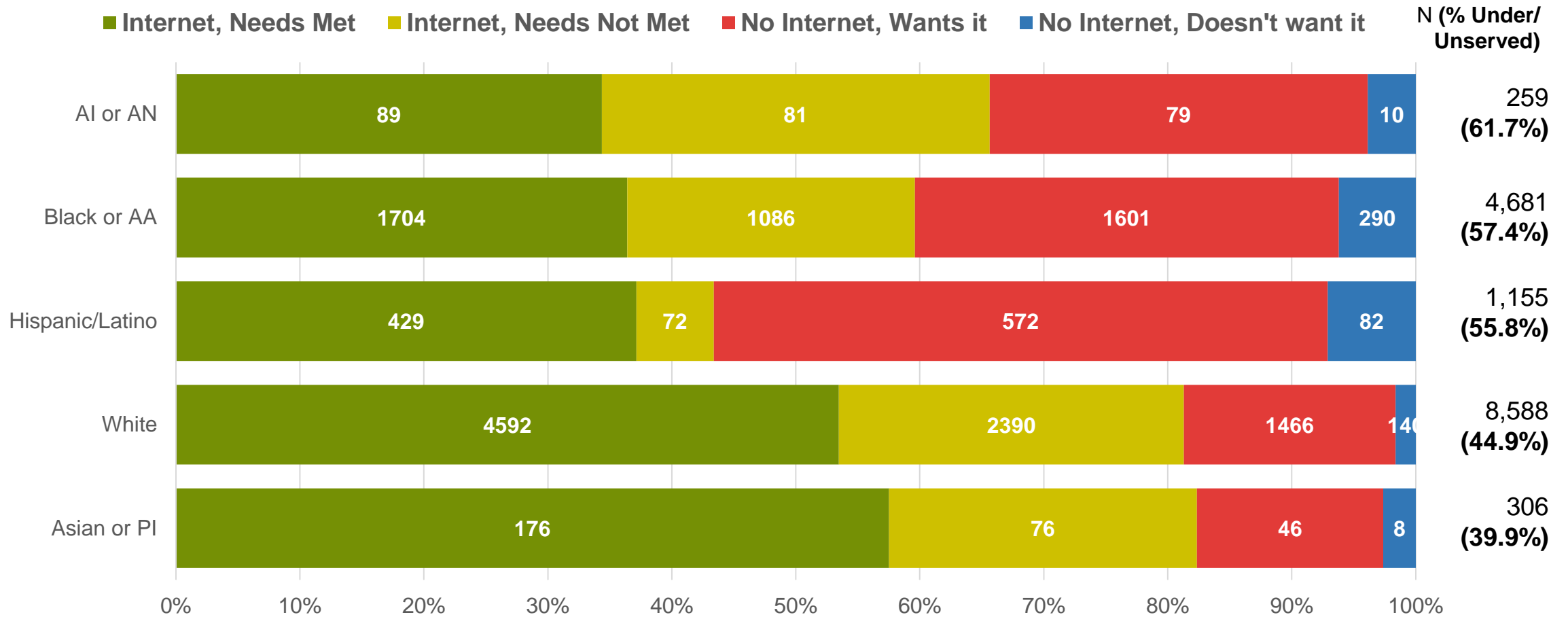
How do you feel about the current options for connecting your home to the internet?



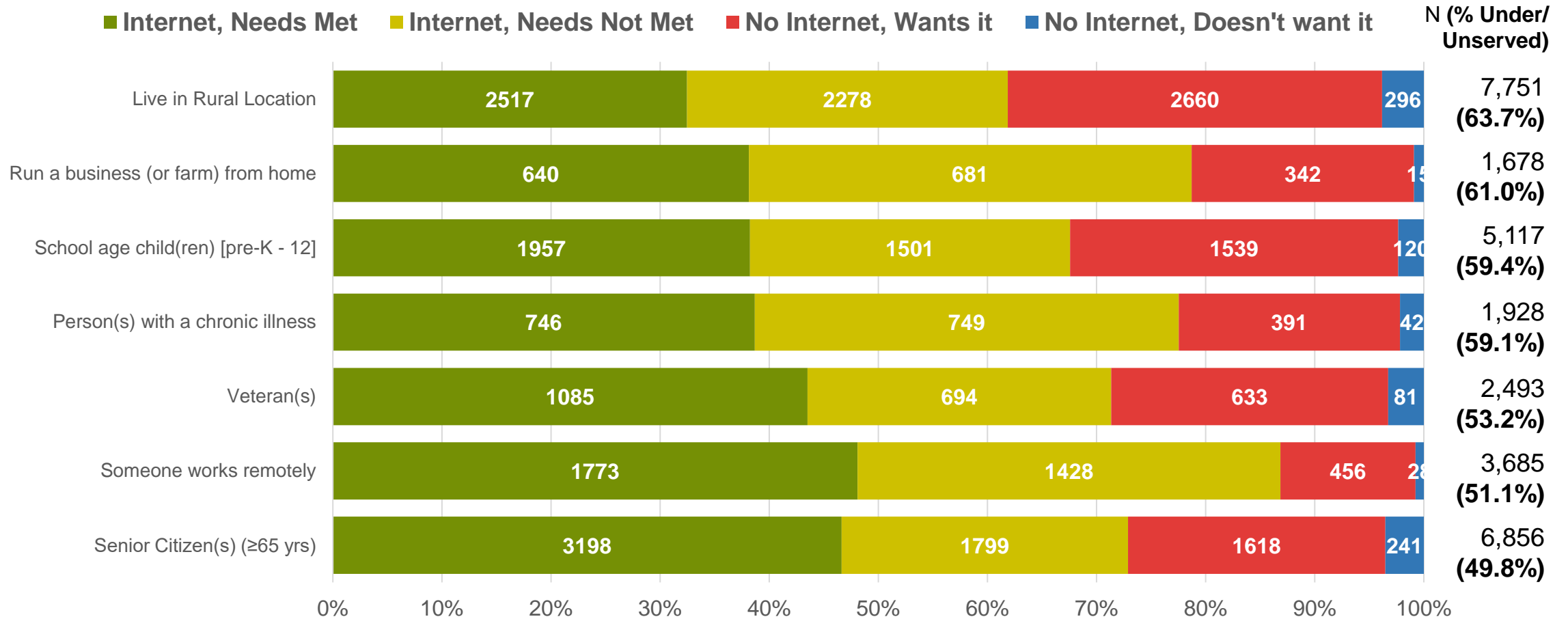
■ Delighted ■ Frustrated ■ Indifferent ■ Stressed



INTERNET NEEDS BY RACE/ETHNICITY

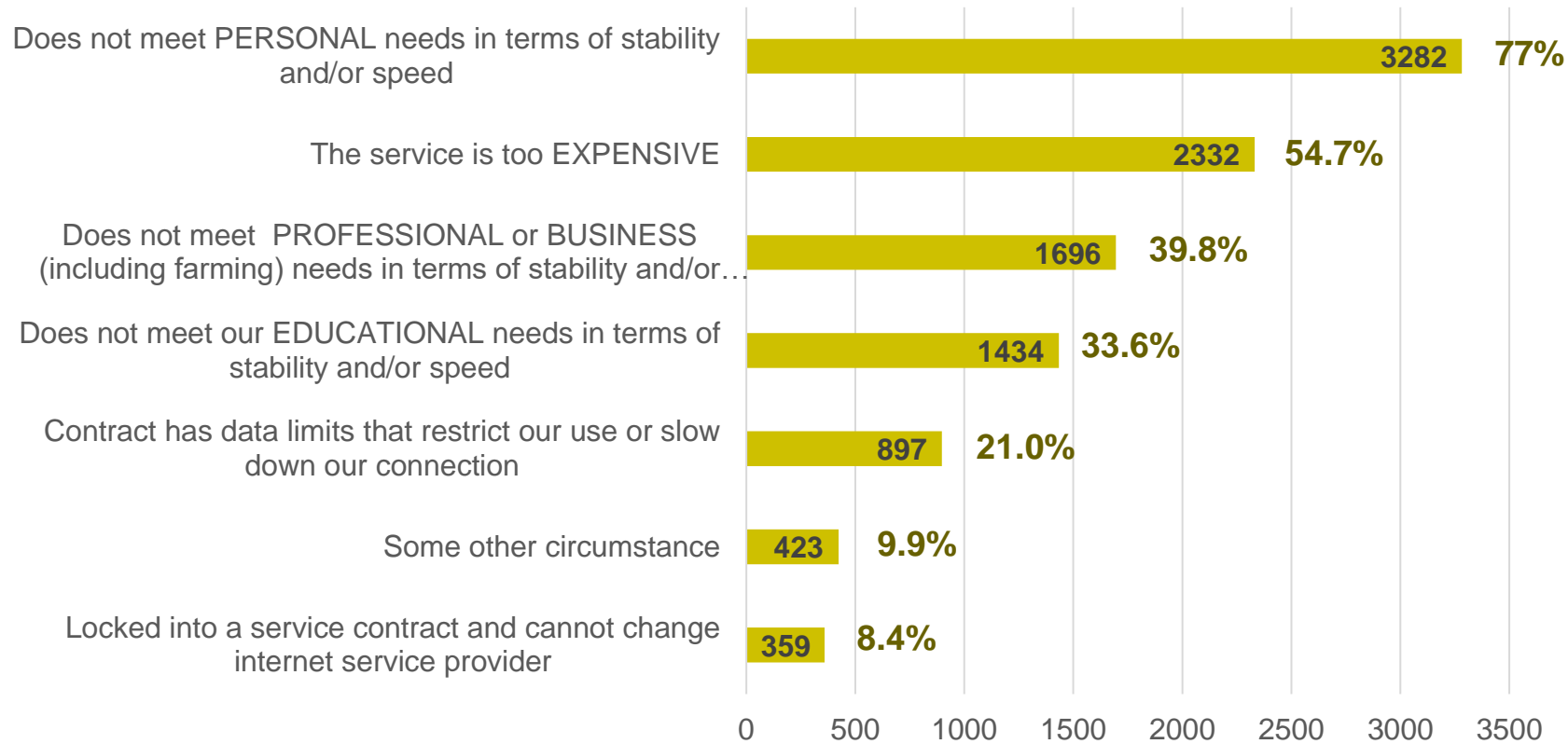


INTERNET NEEDS BY HOUSEHOLD MAKEUP



BARRIERS – HAS INTERNET, NEEDS NOT MET

Which statement(s) best describes your situation or circumstances when it comes to your current home internet connection? Select all that apply.

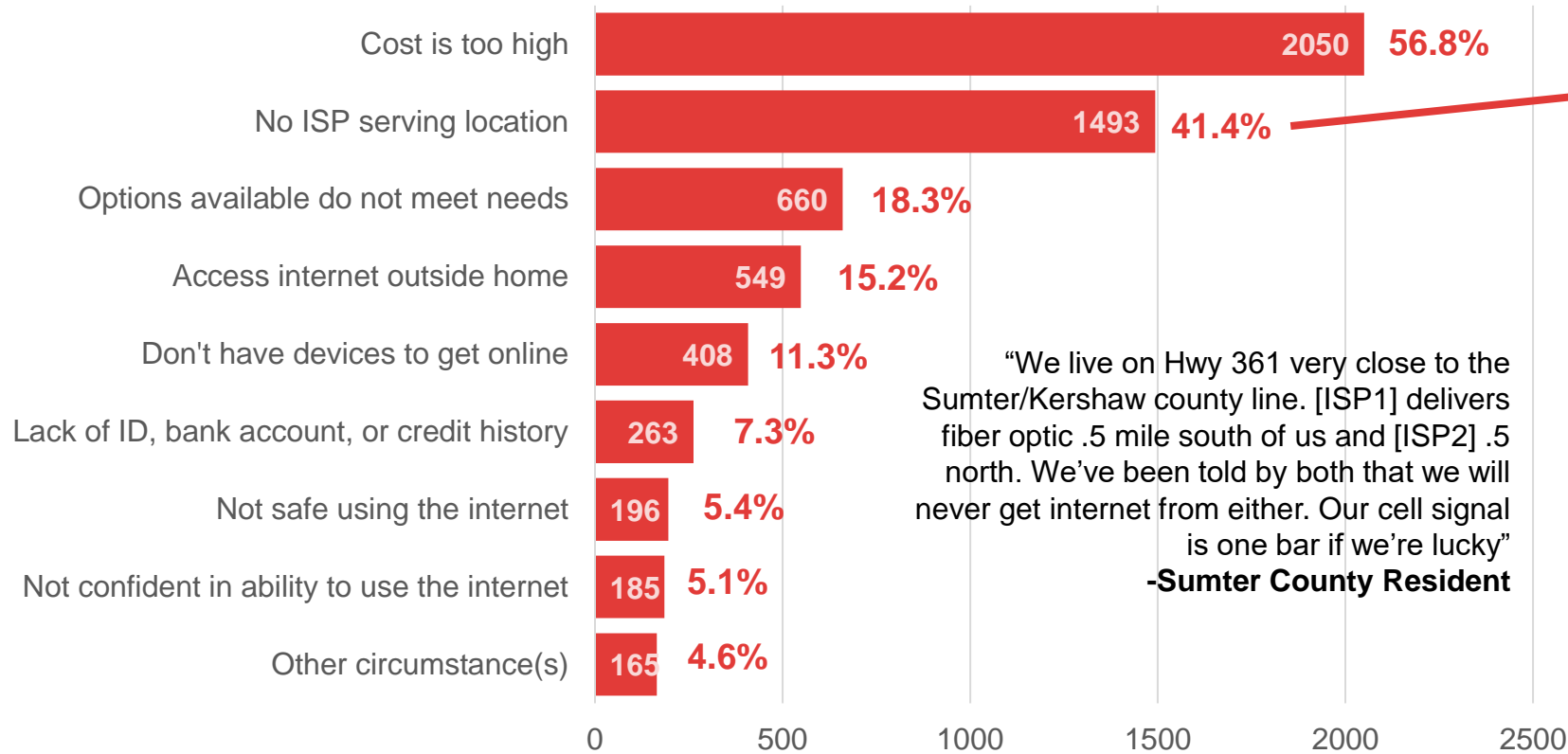


“Because I live in a rural area, the only option I have is for a Wi-Fi box but I am paying \$125 for a month that doesn’t work half the time with very slow speed. My daughter is in high-school and needs fast internet and I’m obtaining a BS degree online.”

Barnwell County Resident

BARRIERS – NO INTERNET OR CELL ONLY, WANTS IT

Based on your experience, which of the following statements describe your situation or circumstance(s)? Select any that apply.



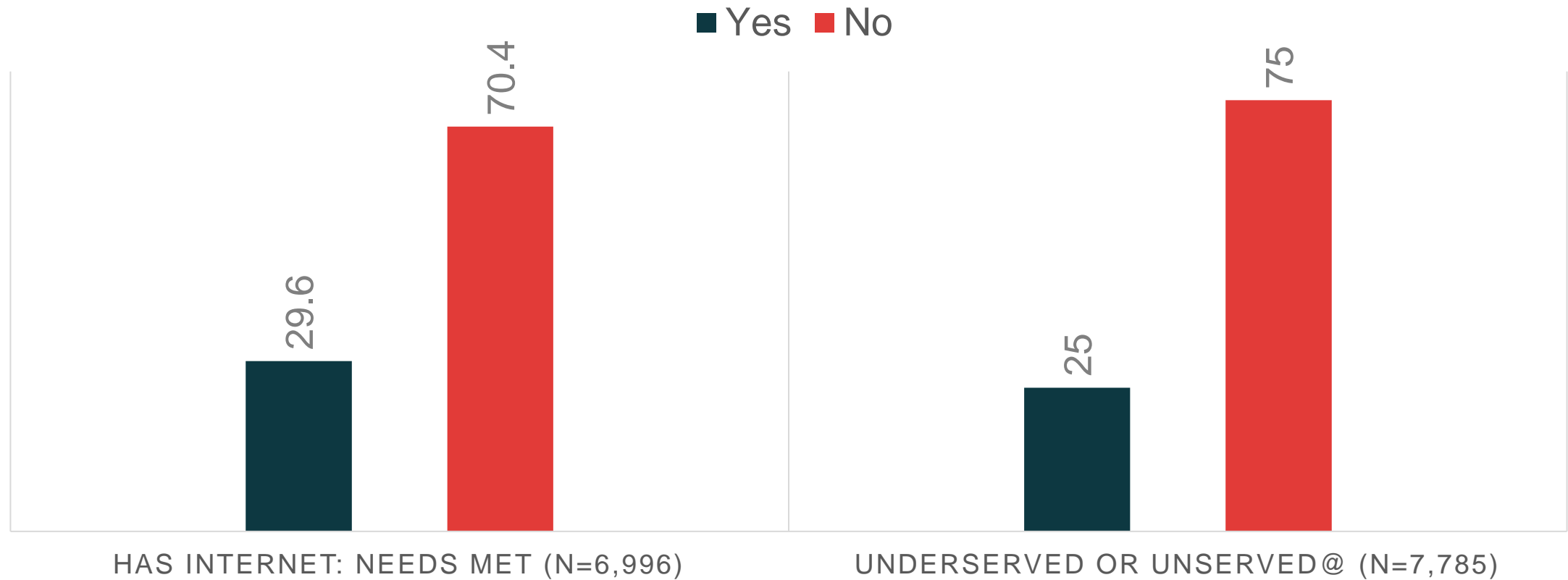
"We live on Hwy 361 very close to the Sumter/Kershaw county line. [ISP1] delivers fiber optic .5 mile south of us and [ISP2] .5 north. We've been told by both that we will never get internet from either. Our cell signal is one bar if we're lucky"
-Sumter County Resident

Top 13 zip codes, indicating no ISP serving location

Zip	n	%
29138	64	4.3
29113	57	3.8
29059	45	3
29817	44	3
29832	30	2
29810	29	1.9
29812	28	1.9
29003	27	1.8
29115	26	1.7
29150	26	1.7
29646	26	1.7
29824	24	1.6
29847	22	1.5

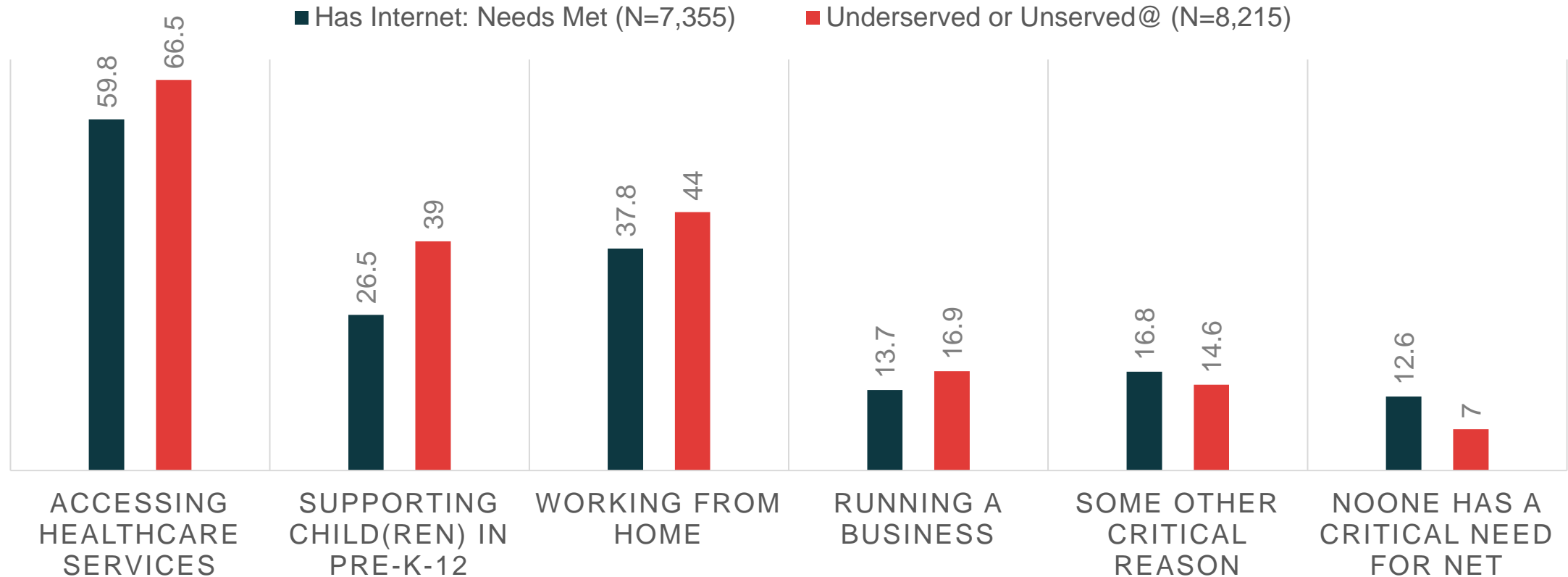
ACP FAMILIARITY

Are you familiar with the Affordable Connectivity Program (ACP) program?

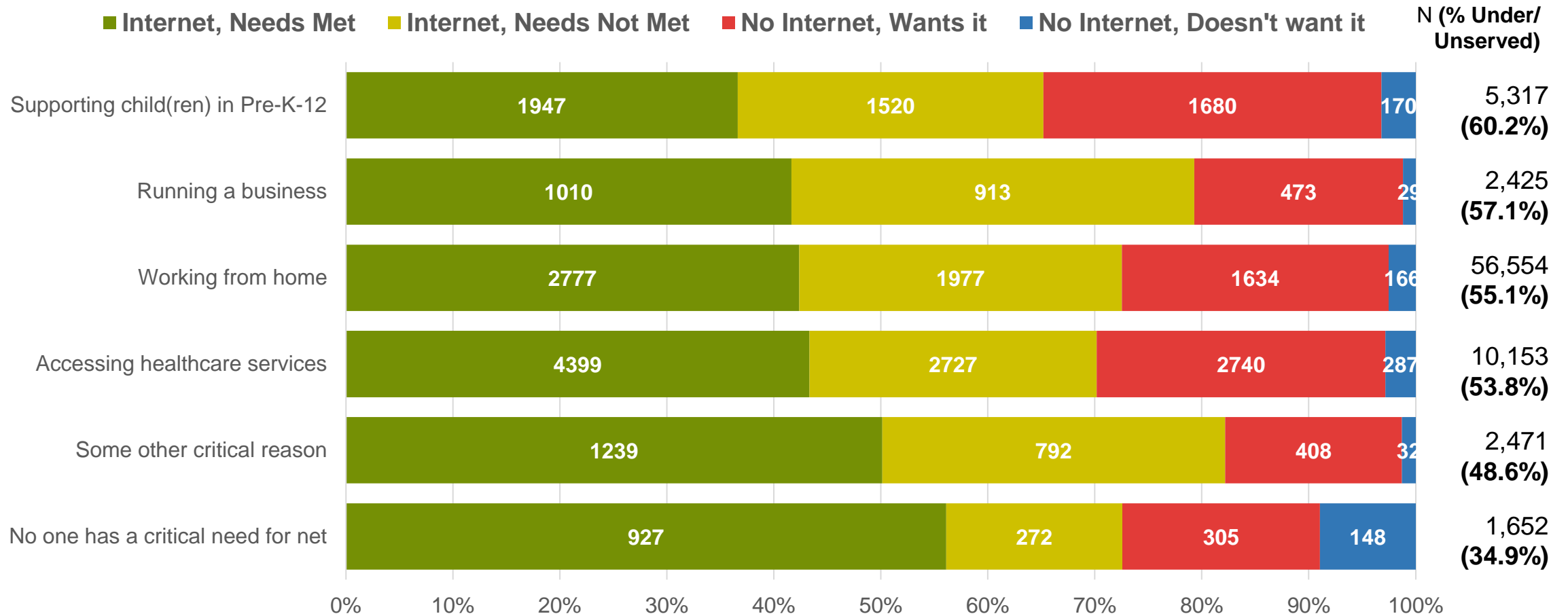


CRITICAL NEEDS

Whether you have internet at home or not, complete the following statement by selecting ALL options that apply to members of your household. I/We NEED reliable internet access at home for:

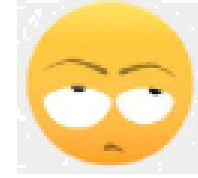
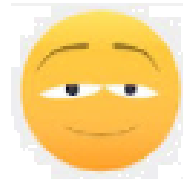


INTERNET NEEDS BY CRITICAL NEED

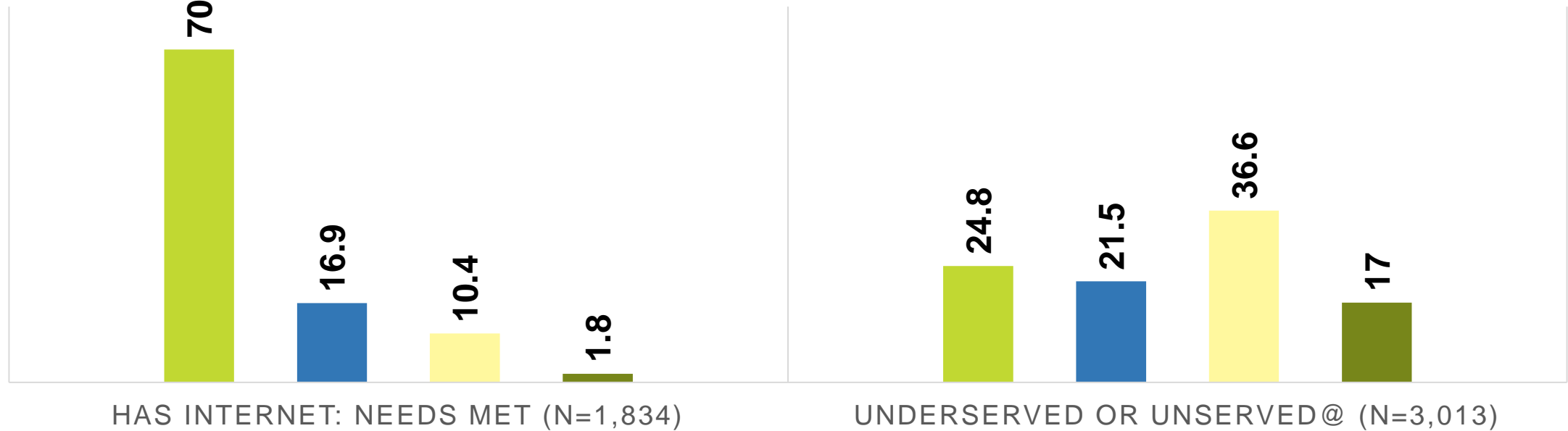


FEELING ABOUT CHILD SUCCESS

Considering your current access to the internet, how do you feel about your child(ren)'s ability to be successful in their education?



■ Comfortable
 ■ Indifferent
 ■ Nervous
 ■ Skeptical



FUTURE DIRECTIONS

Get Connected Get Connected Get Connected Get Connected Get Connected Get Connected
Get SC Connected Get SC Connected Get SC Connected Get SC Connected Get SC Connected
Get SC Connected Get SC Connected Get SC Connected Get SC Connected Get SC Connected
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WHAT'S NEXT?

- **5-year Action Plan** – EY & SC BBO
- **Research** – Answer Policy-Relevant Research Questions
- **Dissemination** – To: Academics, Policymakers, Community, other Stakeholders



THANKS!

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UNIVERSITY OF
South Carolina

**Get
Connected
SC**

BETTER
INTERNET
FOR A
BETTER
SOUTH
CAROLINA

APPENDIX



UNIVERSITY OF
South Carolina

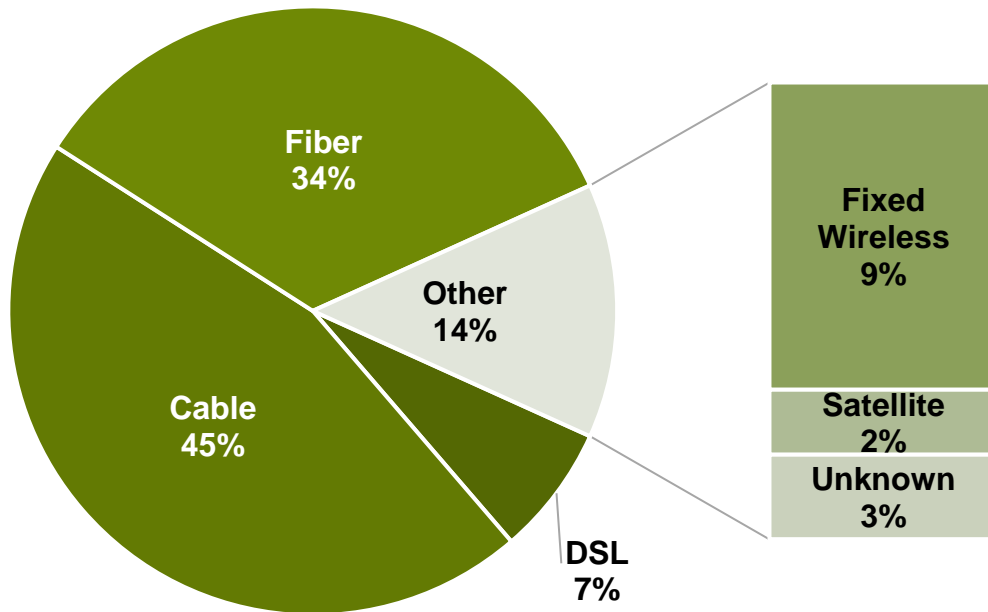
SURVEY DESIGN

- The survey development was an iterative process starting with a review of literature and similar initiatives followed by thematic analysis to develop a draft initial survey
- Weekly meetings were held with key partners to review and refine various stages of the survey
- The survey tool was pilot tested.

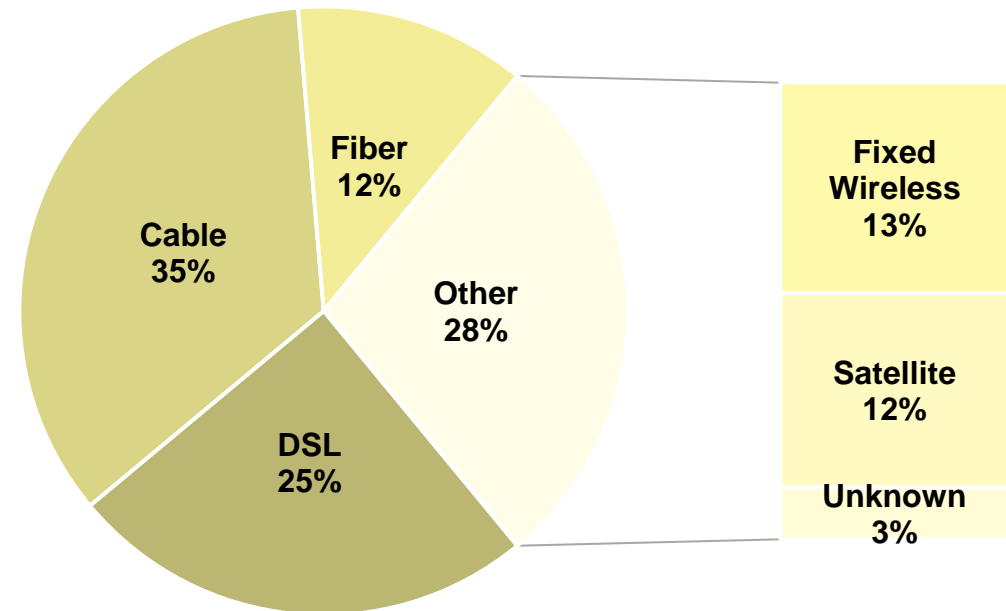


TECHNOLOGY TYPE BY NEED

Has Internet; Meets Needs

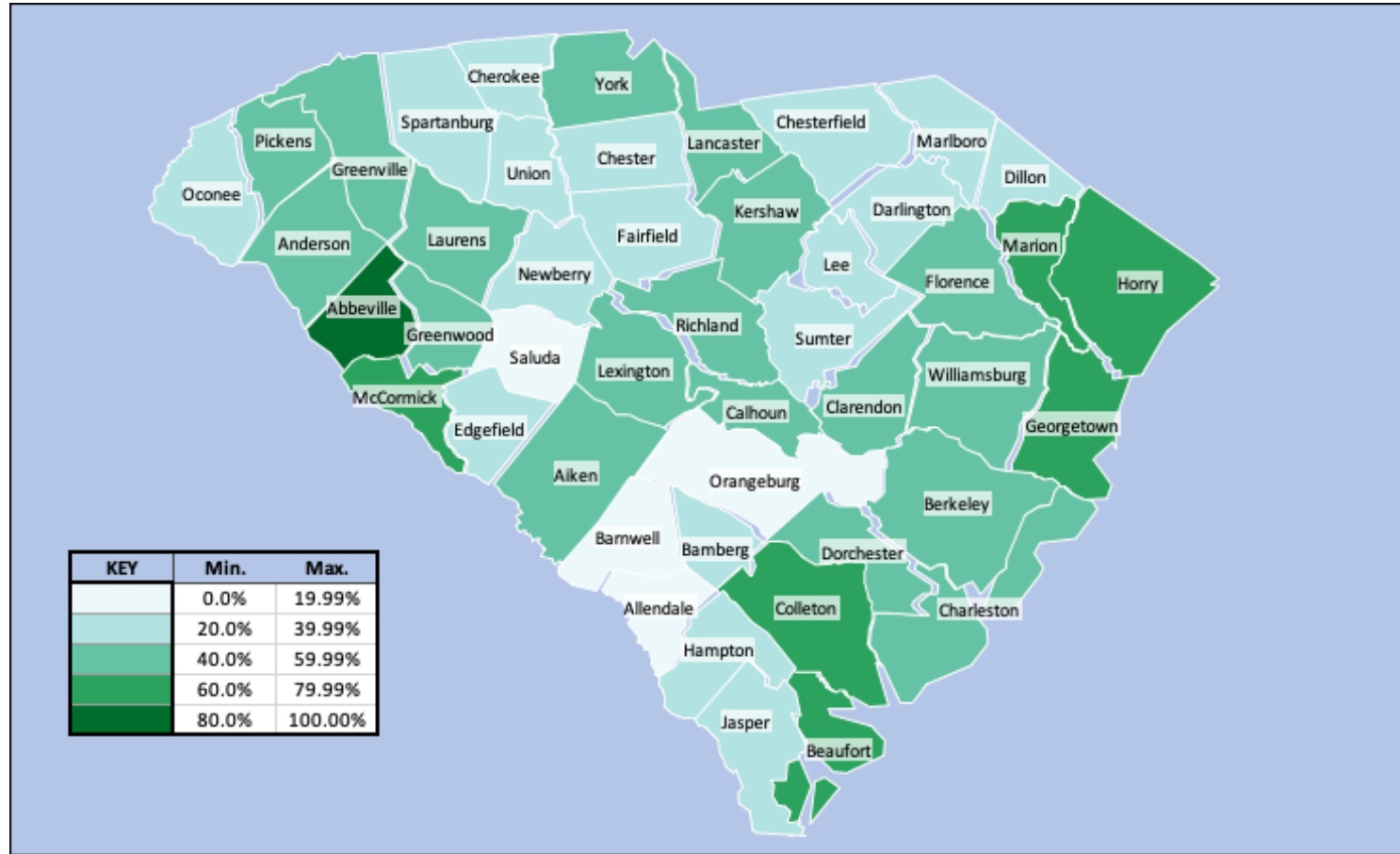


Has Internet; Doesn't Meet Needs



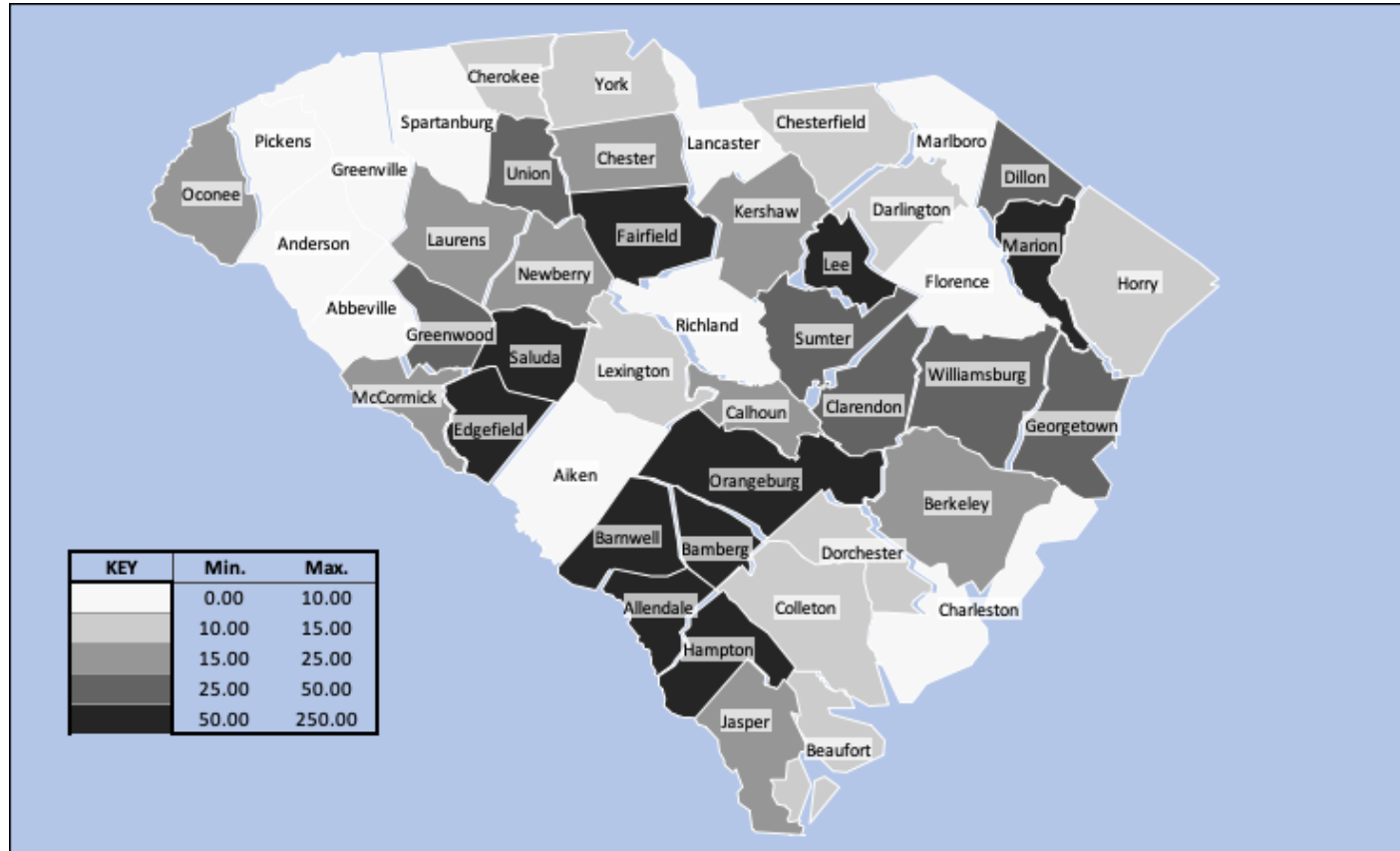
GEOGRAPHY OF SERVED COMMUNITIES

Percentage
(% out of all
county
responses)
of **served**
community
per county



GEOGRAPHY OF UNDER/UNSERVED COMMUNITY

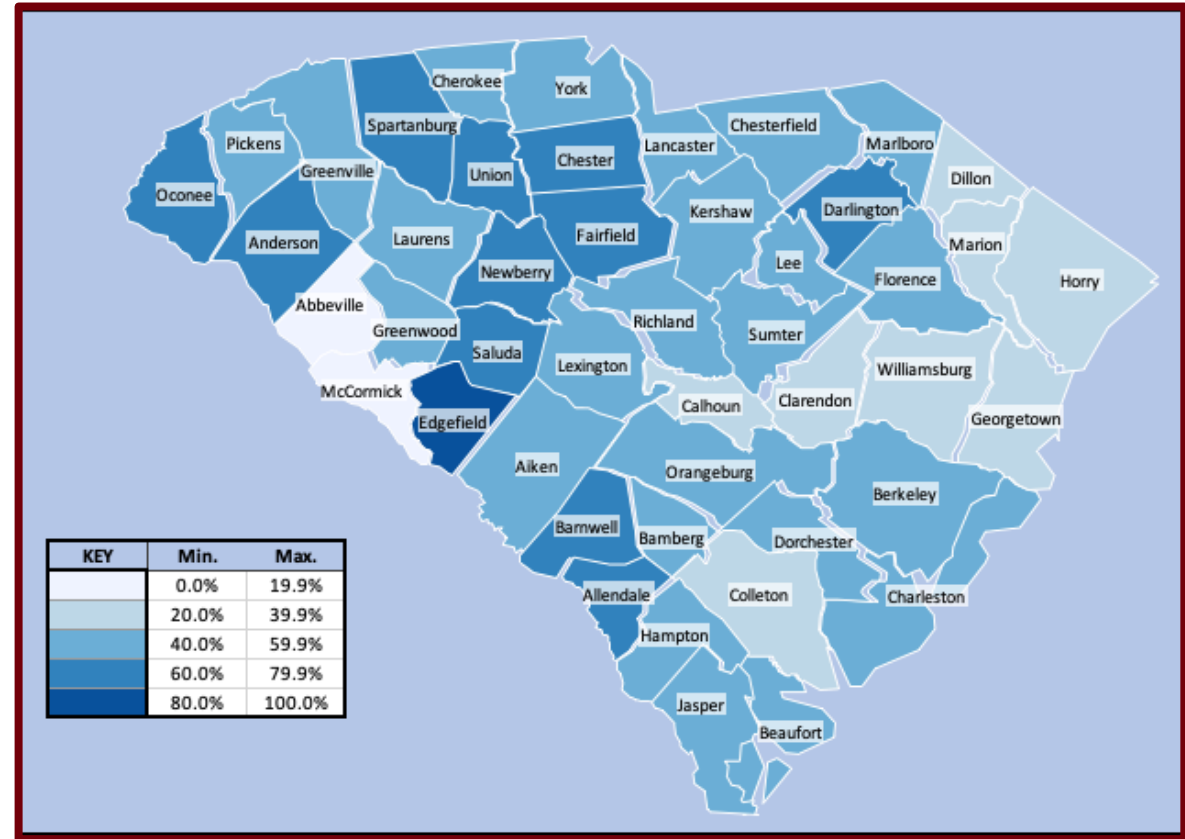
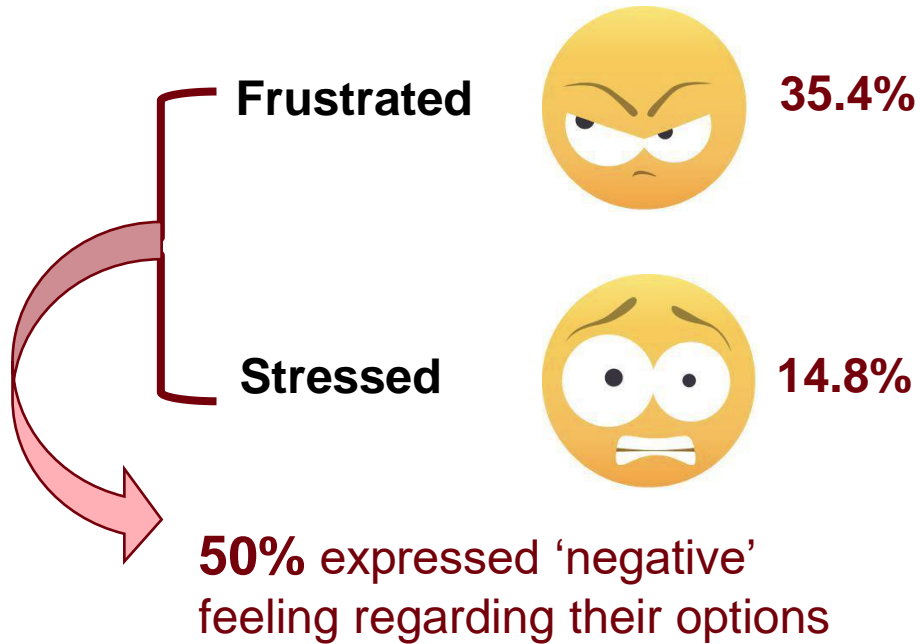
Rate (per 10,000) of Under/Unservd community per county



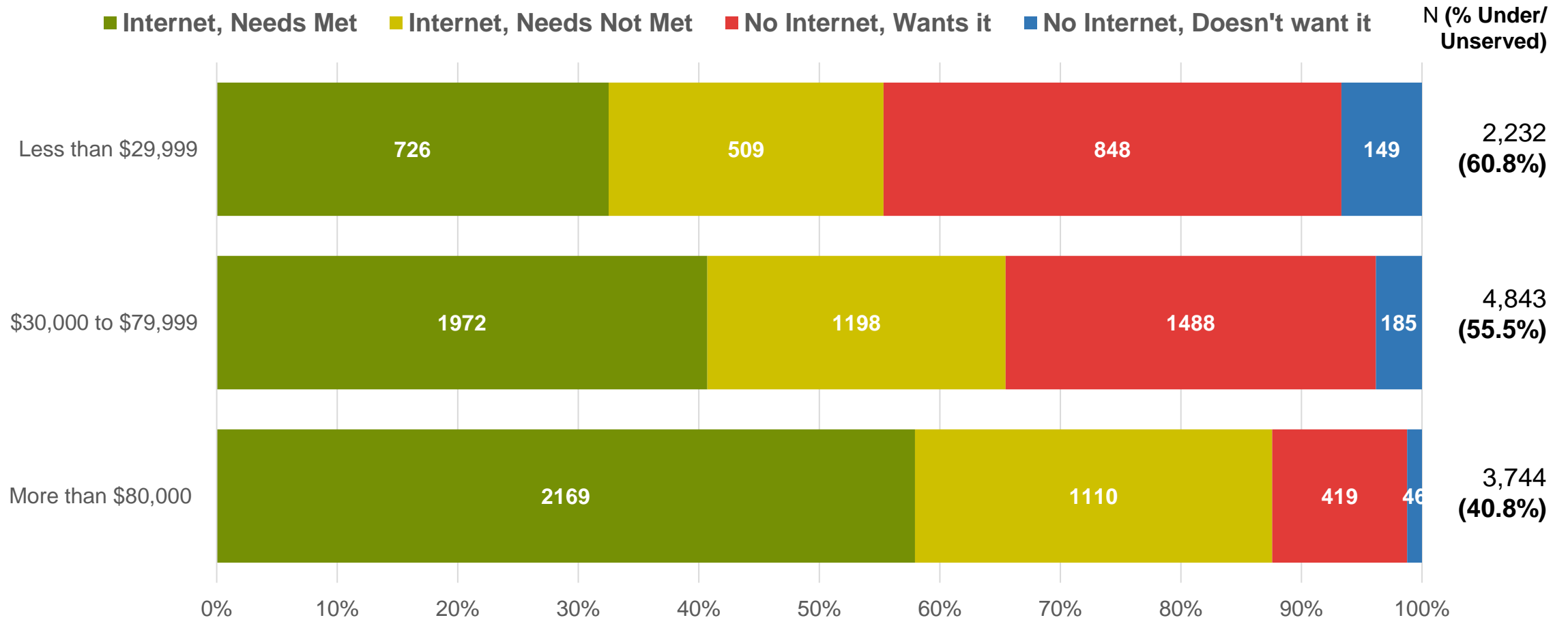
FEELING ABOUT OPTIONS

How do you feel about the current options for connecting your home to the internet?

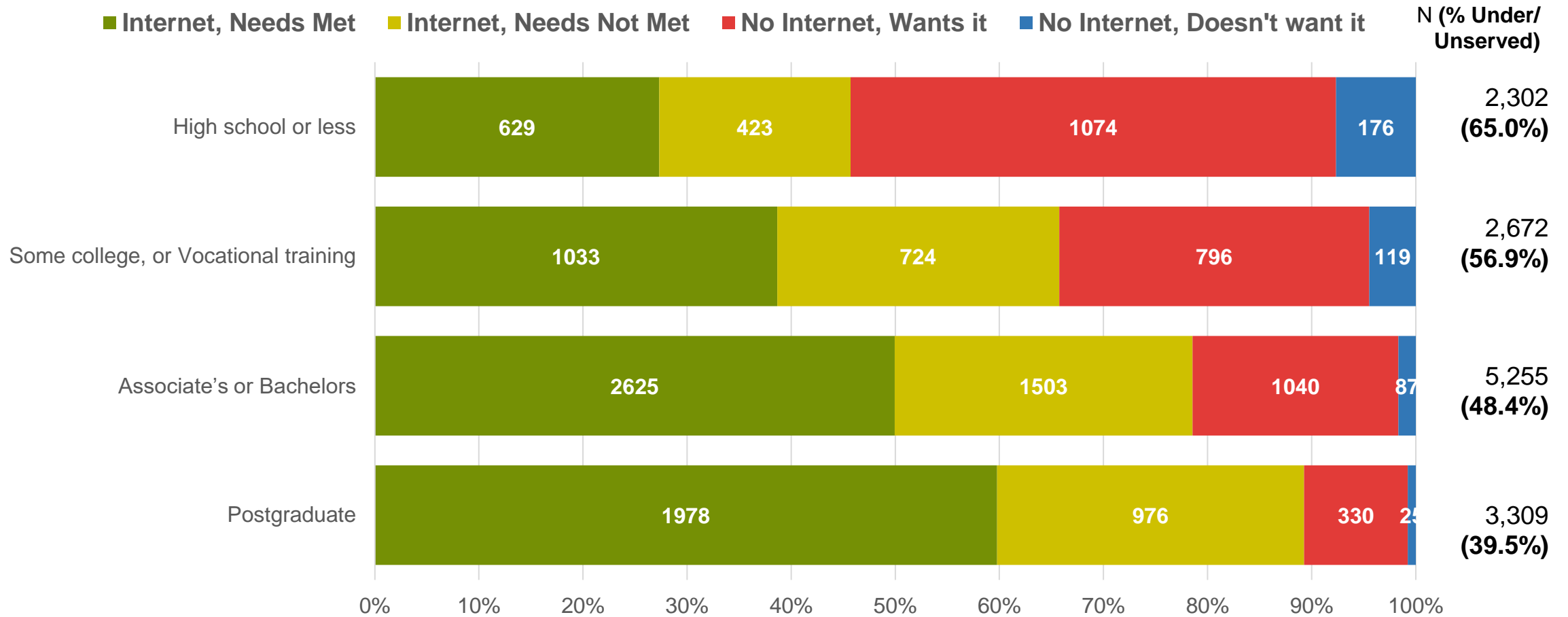
Percentage of Negative Feelings by county



INTERNET NEEDS BY HOUSEHOLD INCOME

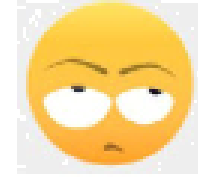
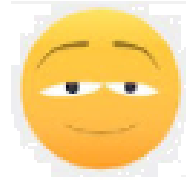


INTERNET NEEDS BY EDUCATION LEVEL

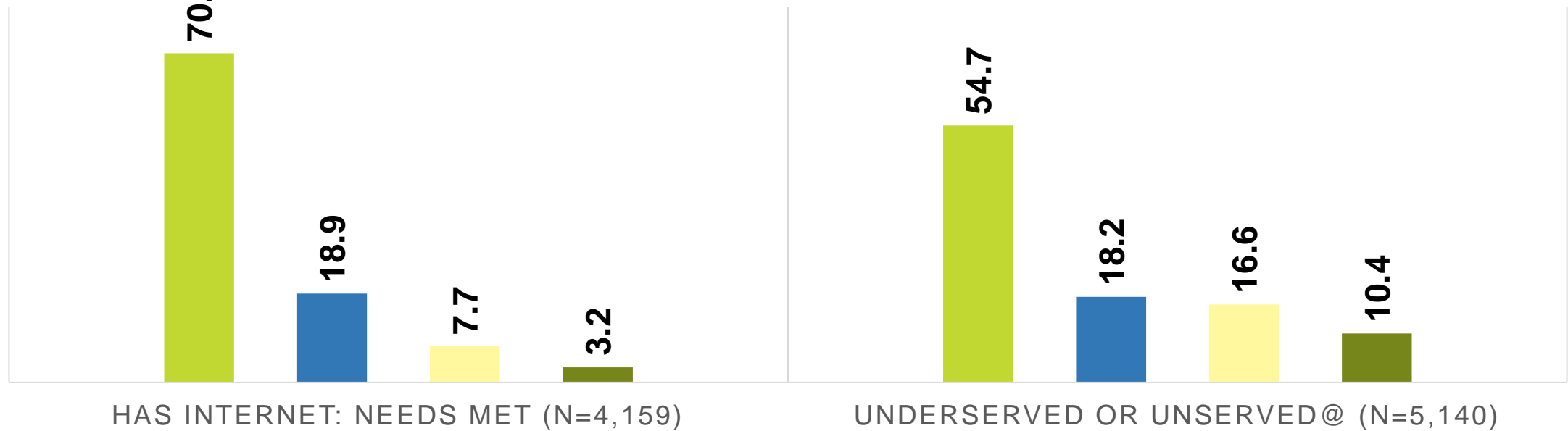


FEELING ABOUT TECHNOLOGY FOR HEALTH SERVICES

How do you feel about using technology to access healthcare services?



■ Comfortable
 ■ Indifferent
 ■ Nervous
 ■ Skeptical

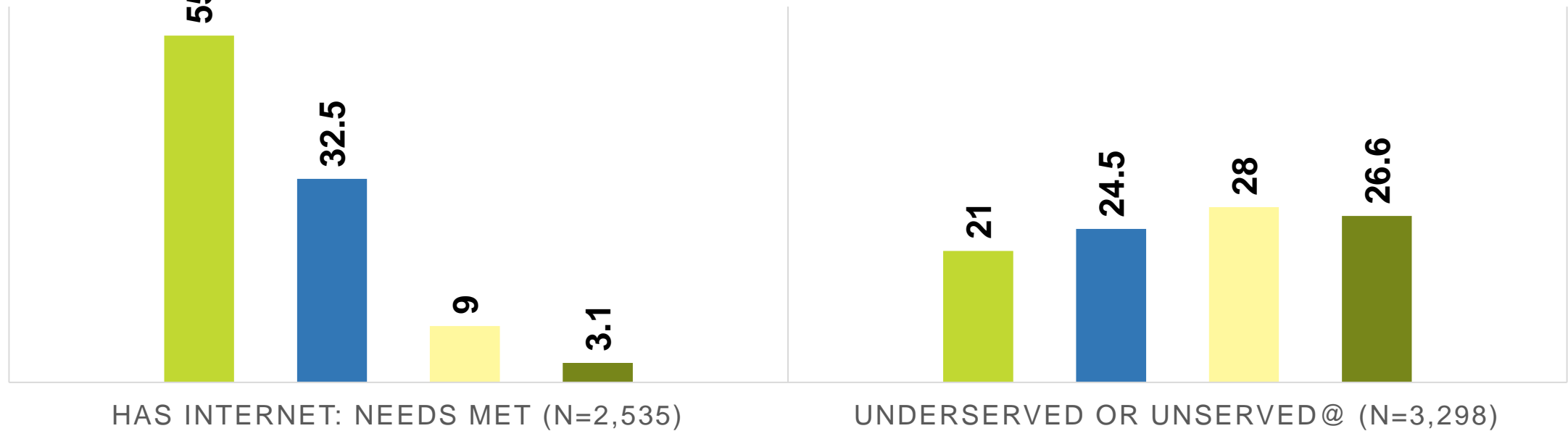


FEELING ABOUT JOB OPPORTUNITIES

How does your ability (or inability) to work remotely make you feel about your job opportunities?

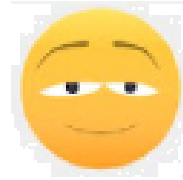


■ Excited ■ Indifferent ■ Stressed ■ Frustrated

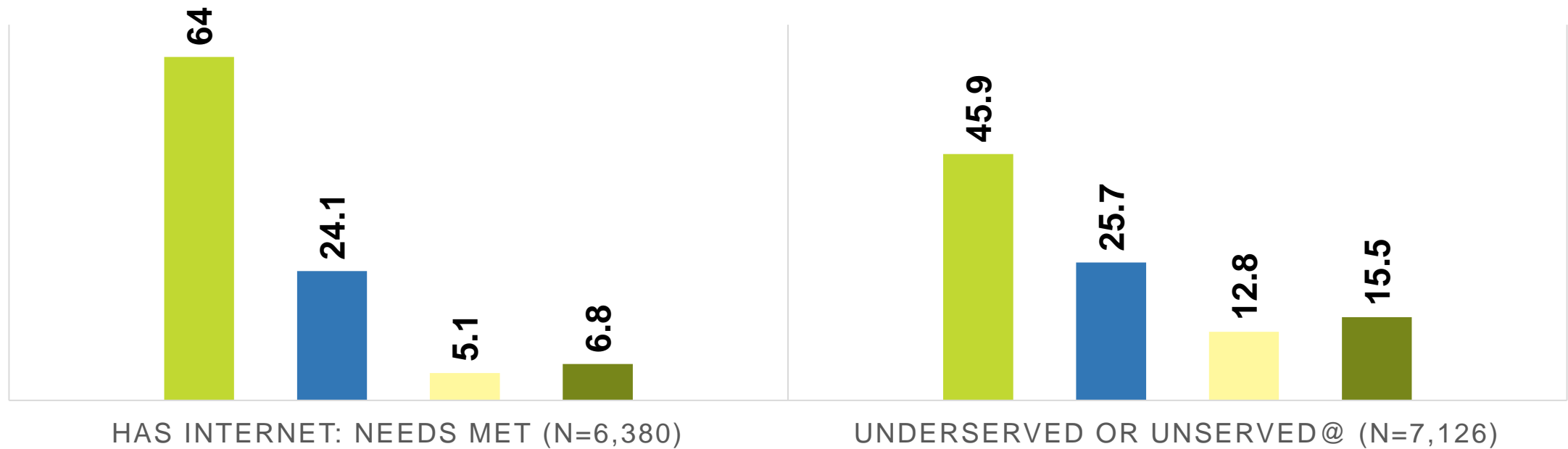


FEELING ABOUT DOING NEW THINGS ONLINE

When you're doing new things online that you would usually do in person, how do you feel?



■ Comfortable
 ■ Indifferent
 ■ Stressed
 ■ Confused



INTERNET USE

In general, how do you use the internet today? Select ALL that apply, regardless of how or where you connect to the internet.

