

# Public Safety Communications Survey



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# TAKING THE PULSE OF PUBLIC SAFETY COMMUNICATIONS

## Methodology

This survey was conducted by Lexipol on behalf of Verizon in August 2021 among a national sample of 3,033 first responders (Fire, EMS and Police).

## Target Survey Audience & Demographics

- Self-selected as either a member of Police, Fire, or EMS
- Respondents had an opportunity to select a secondary line of Public Safety they were also involved with (e.g. Fire and EMS)
- Nearly 50% of respondents have been on the force since before September 2001



# FOCUS AREAS

## **Tech on the Job**

Device dependence, desired features, technology concerns

## **Readiness and Crisis Response**

Features used, tech-preparedness, interagency coordination importance, interoperability importance

## **Looking Back, Looking Ahead**

Greatest tech improvements in past 20 years, future tech improvement needs

## **The Rise of 5G**

5G understanding, future 5G importance, most critical 5G benefits



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## TAKEAWAYS

1. **First responders are confident they can handle a crisis with the current technology in place.** 7 in 10 surveyed feel prepared to handle a natural disaster with their current tools. However, there is room for improvement: nearly a quarter (18%) feel their agency's technology is not preparing them to face a crisis.
2. **Operating on a reliable network remains at the top of the wish-list for public safety.** Over a third said that having a reliable network would be key to the future of tech developments in public safety – which aligns as the current technology feature that more than half of first responders want right now but don't have is the ability to transmit data faster: from quicker uploads and downloads to being able to share their position in the field.
3. **Coordination and interoperability are top of mind for First Responders.** 93% of first responders stated coordination between agencies is critical when responding to public safety crises and emergency situations. Specifically, from a communications perspective, 80% felt that Interoperability, the ability to communicate across agency regardless of network or device, was a critical concern for emergency response.
4. **First Responders are benefiting from using data in their emergency response:** In listing the top three technological improvements over the past 20 years, first responders listed the use of data (e.g. social media, license plate data, etc.) behind only communications devices.



# Tech on the Job

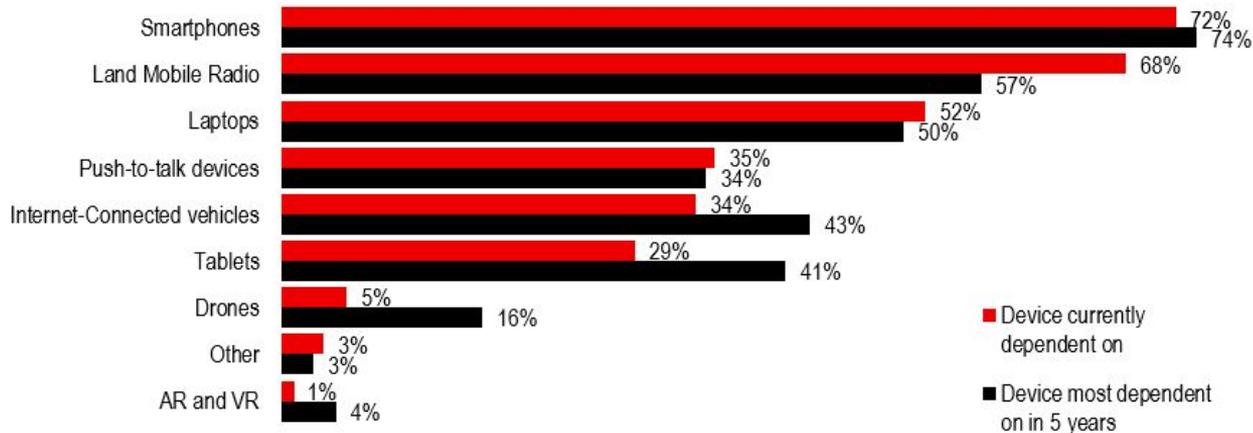


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## TECH ON THE JOB

While first responders overall believe that smartphones and Land Mobile Radios (LMR) will achieve near-parity in terms of importance in the next five years, they believe that emerging technologies such as internet-connected vehicles, drones, and tablets will increase significantly in terms of the device they will be most reliant on in the next five years.

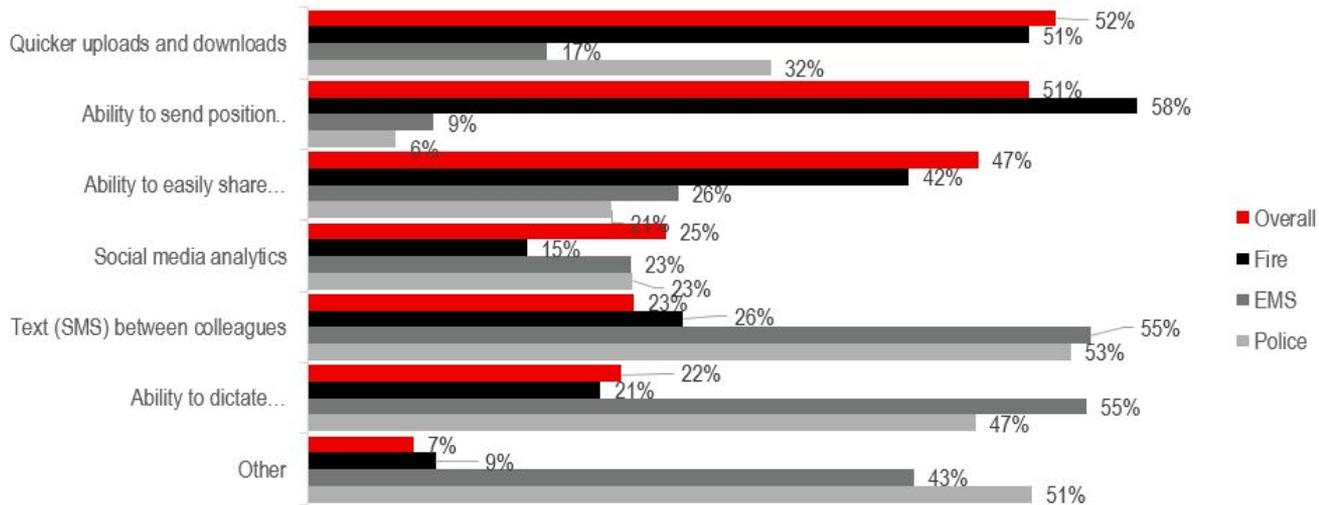
*Of the devices you use on the job on a daily basis, which are you most dependent on? In five years, which of the following devices will you be most dependent on in your job?*



# TECH ON THE JOB

There is a significant want and need for technology with quicker upload and download speeds in the field. Tech with the ability to send position information to each team member while in the field is also a priority for first responders across agencies, but especially important to those who work in the fire department.

*Which of the following features/technologies do you want in the job that you're not getting?*

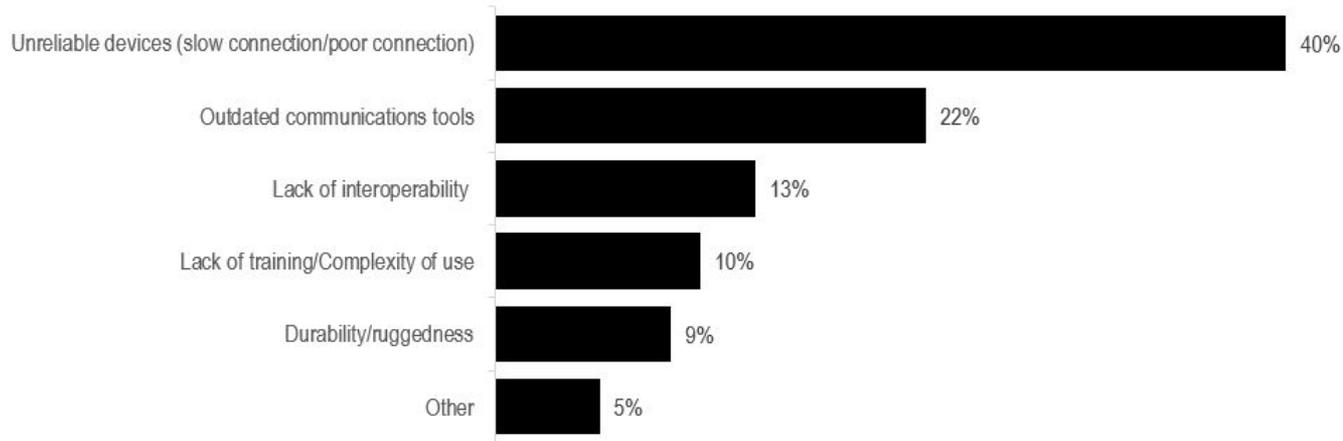


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## TECH ON THE JOB

A strong network, backed with best-in-class devices and tools would address the largest concerns that First Responders have with their current technology usage on the job.

*What is the most significant concern when it comes to your current technology on the job?*



# Readiness and Crisis Response

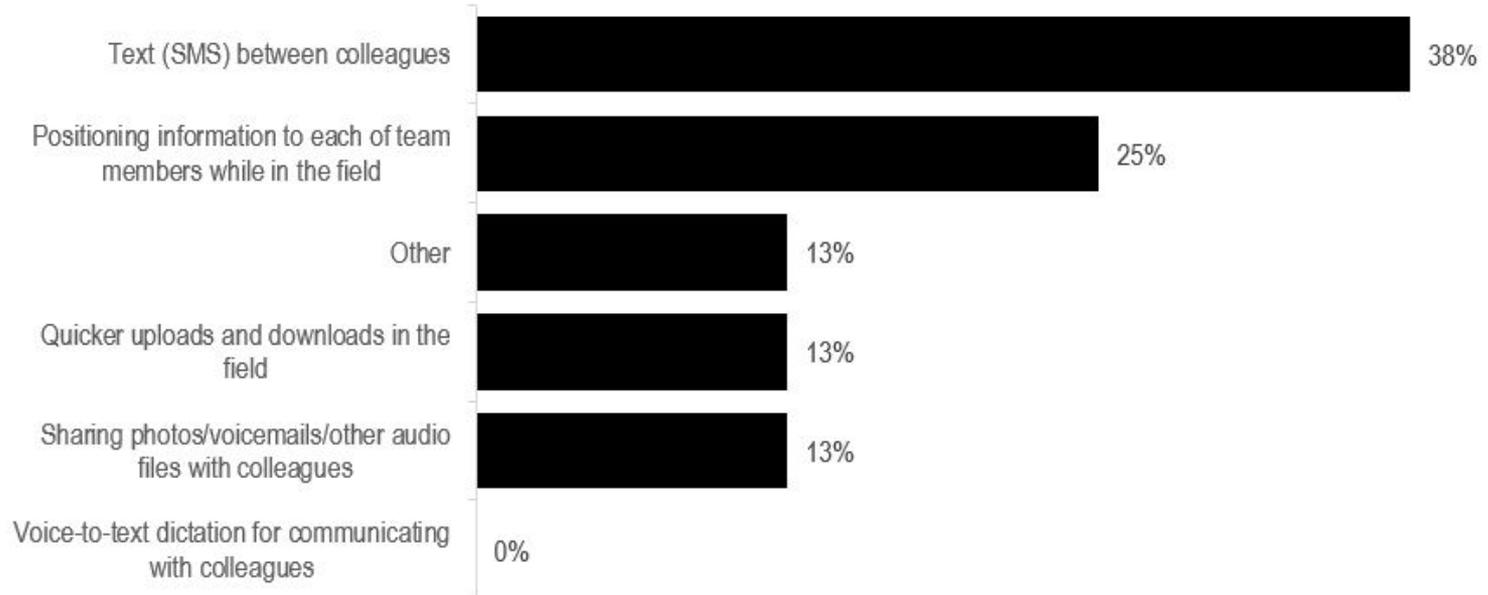


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## READINESS & CRISIS RESPONSE

For emergency response activities, first responders overwhelmingly utilized SMS between colleagues and real-time positioning information, while multimedia usage and bandwidth speeds were also critical.

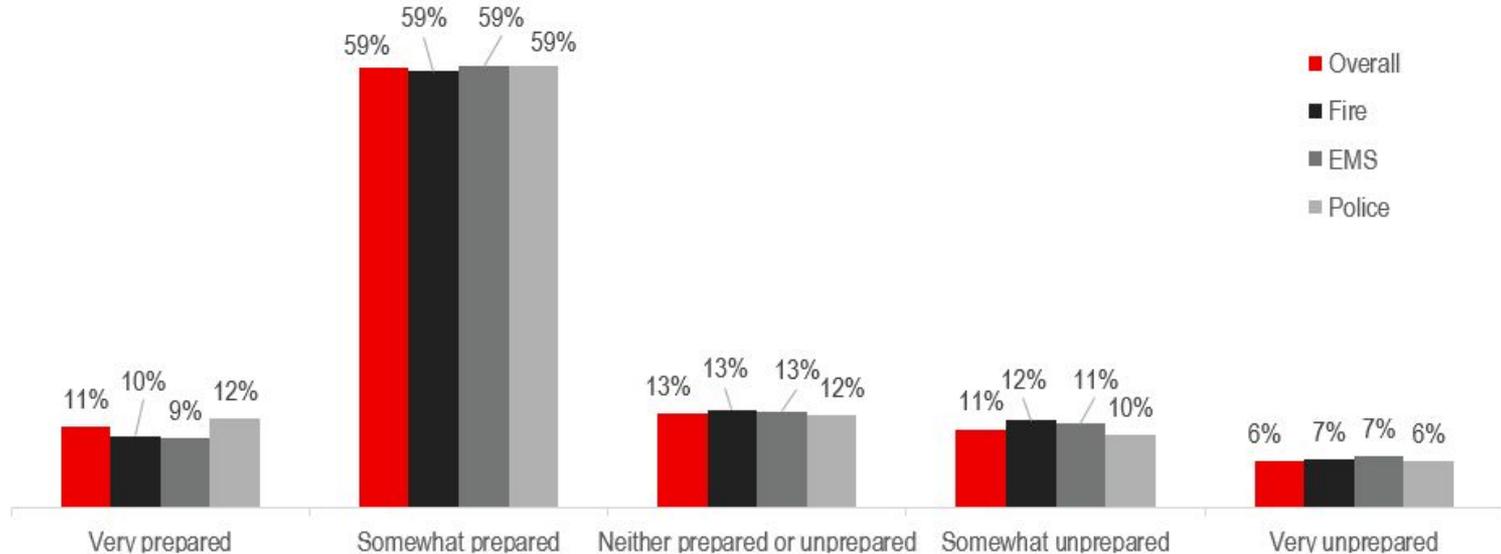
*Which of the following features or technologies do you use as part of your emergency response activities?*



## READINESS & CRISIS RESPONSE

About 7 out of 10 respondents feel confident in their agency's crisis readiness, while a little over 18% of first responders feel unprepared for a natural disaster using their agency's current technology.

*If a natural disaster or crisis occurred today, how well-equipped, technology-wise, is your agency to respond?*

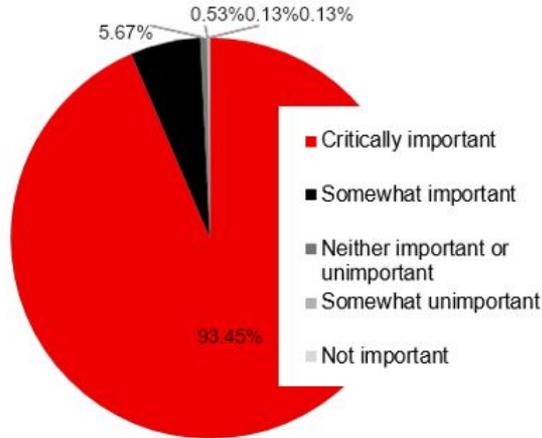


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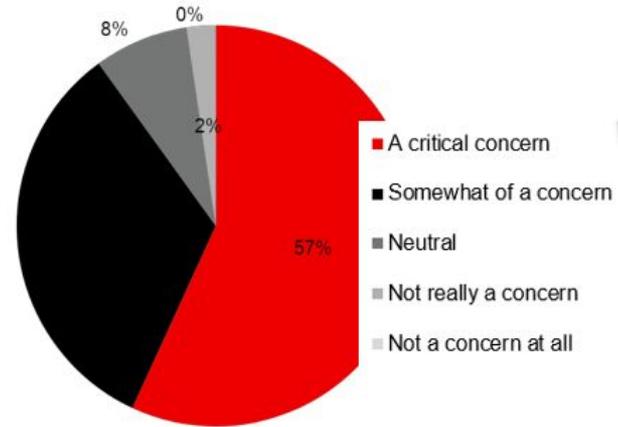
## READINESS & CRISIS RESPONSE

Coordination between public safety agencies was seen as critically important to more than 93% of respondents. To ensure that the technology can enable this coordination, 90% of respondents stated that interoperability between partner agencies was a concern for emergency response activities.

*How important is coordination between public safety agencies in responding to public safety crises and emergency situations?*



*How much is interoperability between partner agencies a significant concern for your emergency response activities?*



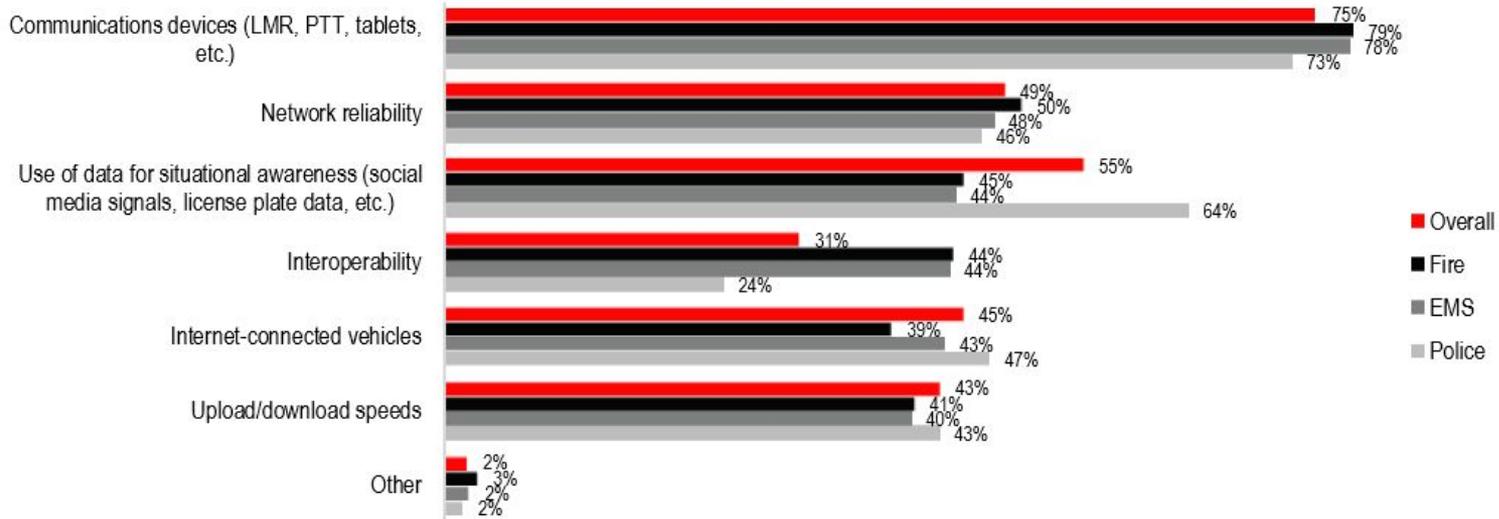
# Looking Back, Looking Ahead



## LOOKING BACK, LOOKING FORWARD

Devices were overwhelmingly seen as the strongest area of technological improvement over the past twenty years across all public safety agencies, while police are benefitting from data for situational awareness at a much higher rate than peer agencies.

*In which three areas have you seen the greatest technological improvements over the past 20 years?*

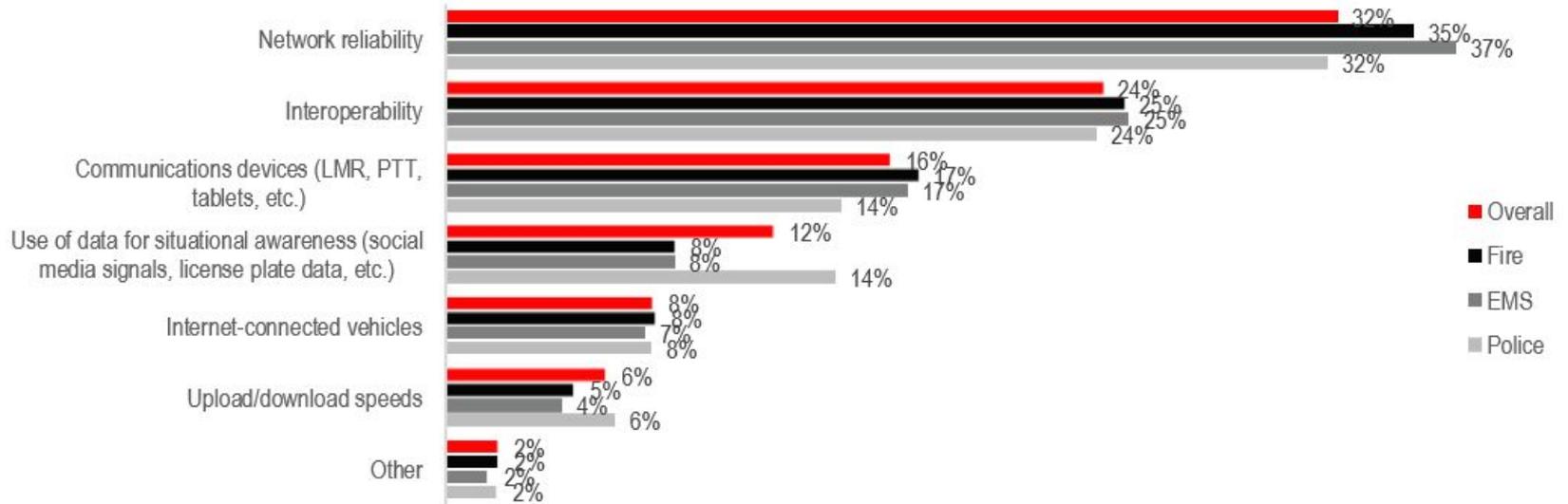


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## LOOKING BACK, LOOKING FORWARD

Network reliability was followed by Interoperability as the area needing the most technological improvements when it comes to public safety.

*Which area do you think needs the most technological improvements when it comes to public safety?*



# The Rise of 5G

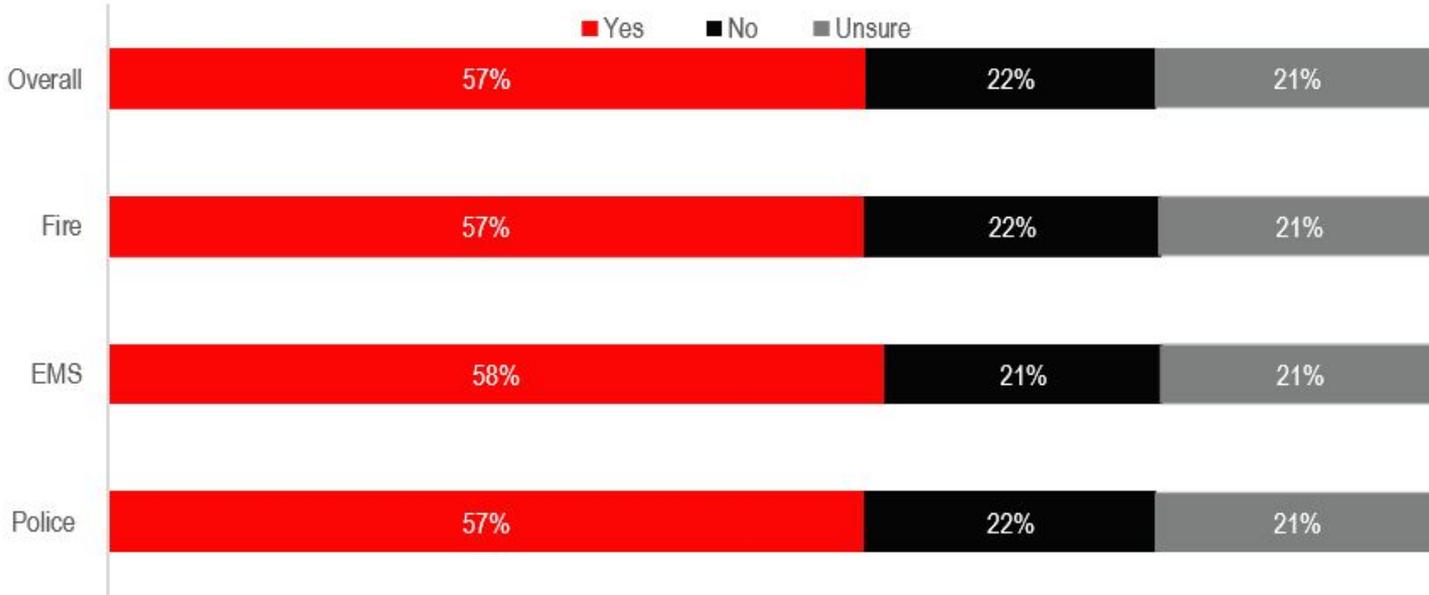


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## THE RISE OF 5G

Almost all (97%) of first responders have heard of 5G, but 4 out of 10 are not confident in their understanding of 5G technology.

*Do you feel that you understand what 5G is?*

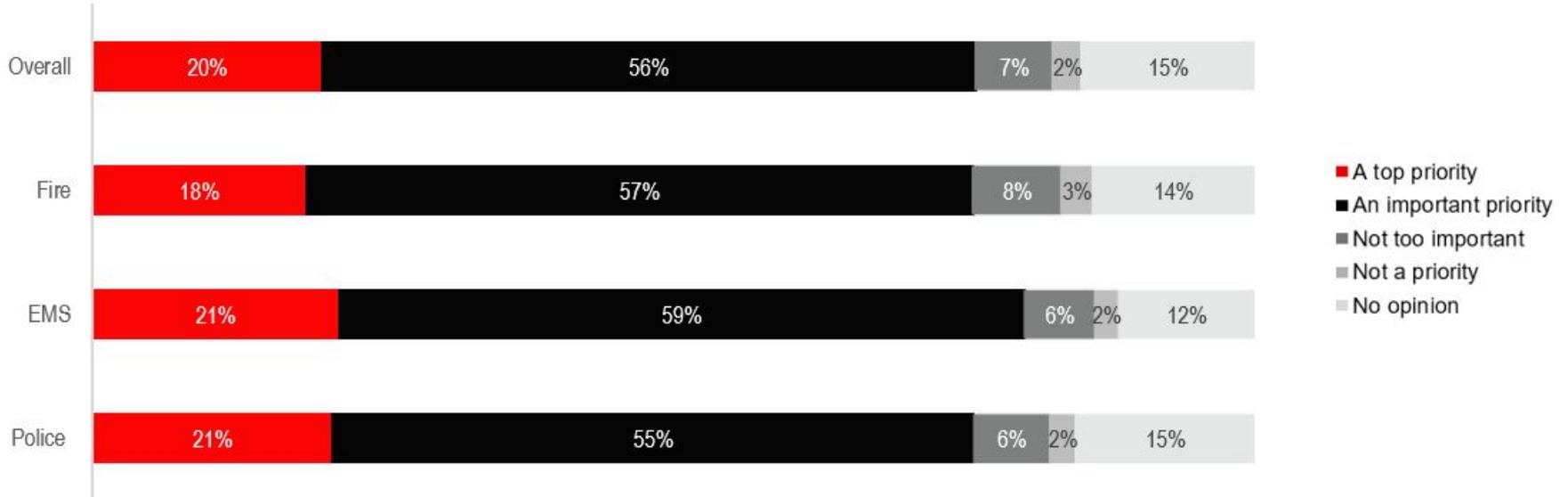


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## THE RISE OF 5G

More than 70% of first responders and 80% of EMS members surveyed believe that 5G will become a priority in the future of public safety technology.

*How important do you think 5G will be to the future of public safety?*



## THE RISE OF 5G

A majority (3/5) of first responders feel that network priority and preemption, as well as data and information transmission speeds will benefit most from 5G advancements

*Which will be the most critical benefit of 5G for public safety personnel?*

