

Verizon Frontline 2023 Public Safety Communications Survey

Taking the pulse of public safety communications.



TAKING THE PULSE OF PUBLIC SAFETY COMMUNICATIONS

Methodology

This survey was conducted by Lexipol on behalf of Verizon Frontline in June 2023 among a national sample of 1,896 first responders (EMS, Fire, Police, Emergency Management, and PSAP/ECC).

Target Survey Audience & Demographics

- Self-selected as member of Emergency Medical Services (EMS), Fire, Law Enforcement, Emergency Management, and Public Safety Answering Point (PSAP)/Emergency Communications Center (ECC) with the ability to choose multiple agencies
- 68% of respondents have been on the force for 10 years or more
- 43% of respondents are an influencer in technology decision making



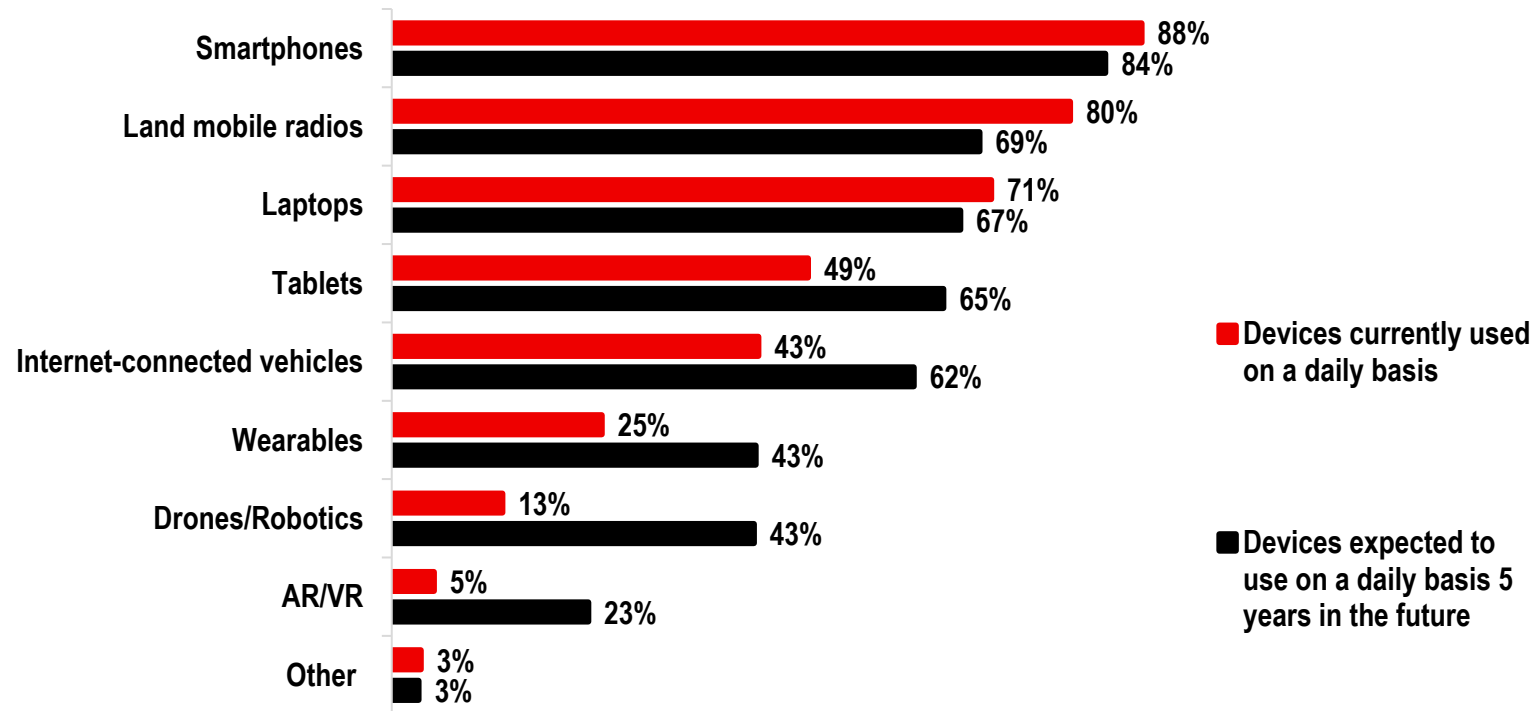
Tech on the Job



TECH ON THE JOB

First responders believe that smartphones, land mobile radios and laptops will remain daily communication tools five years from today. Nearly half of all first responders believe that tablets, internet-connected vehicles, wearables, and drones/robotics will become increasingly useful on the job.

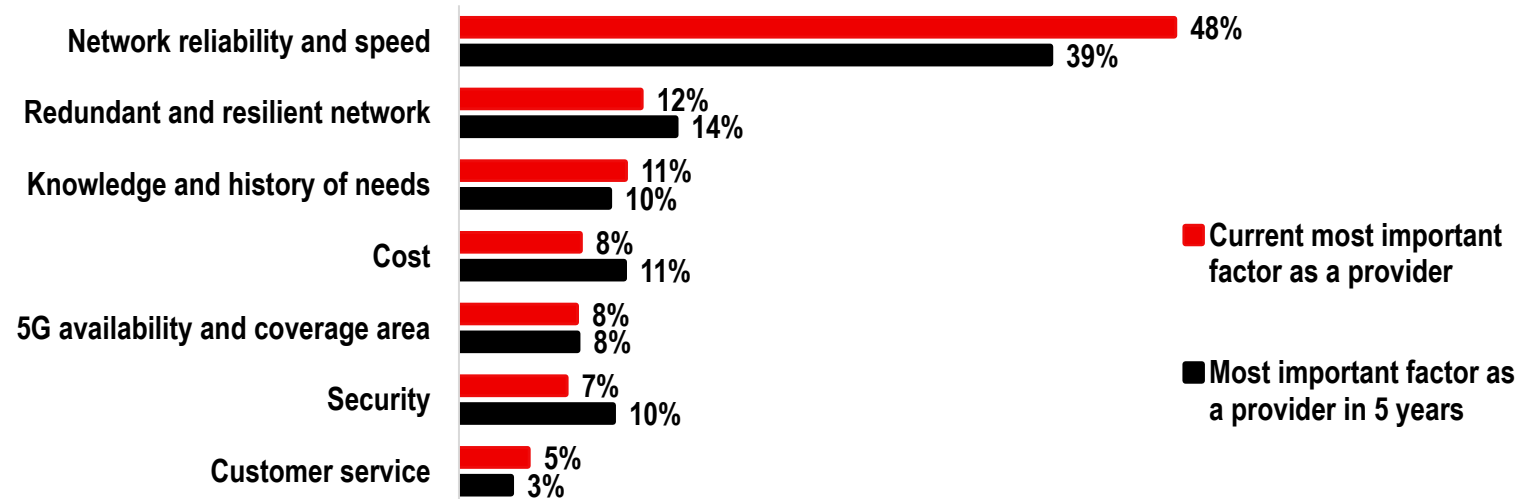
Which communication tools do you use on a daily basis? Which communication tools do you expect to use on a daily basis 5 years from now?



TECH ON THE JOB

Network reliability and speed continue to be the most important considerations when first responders are choosing a communications provider. There was 5-percentage point decrease among first responders who currently consider cost a crucial factor in selecting a public safety communications compared to last year's survey. Meanwhile, the expected importance of 5G availability increased by 5 percentage points year-over-year.

Which of the following factors is MOST important to you in a public safety communications provider? Which of the following factors do you expect to be MOST important to you when selecting a public safety communications provider 5 years from now?



TECH ON THE JOB

In their day-to-day professional communications first responders say a reliable and resilient network is most important to them. The importance of calls and texts between the team increased by 4 percentage points compared to last year. Other important factors include interoperability and fast speeds for photo, video and data sharing.

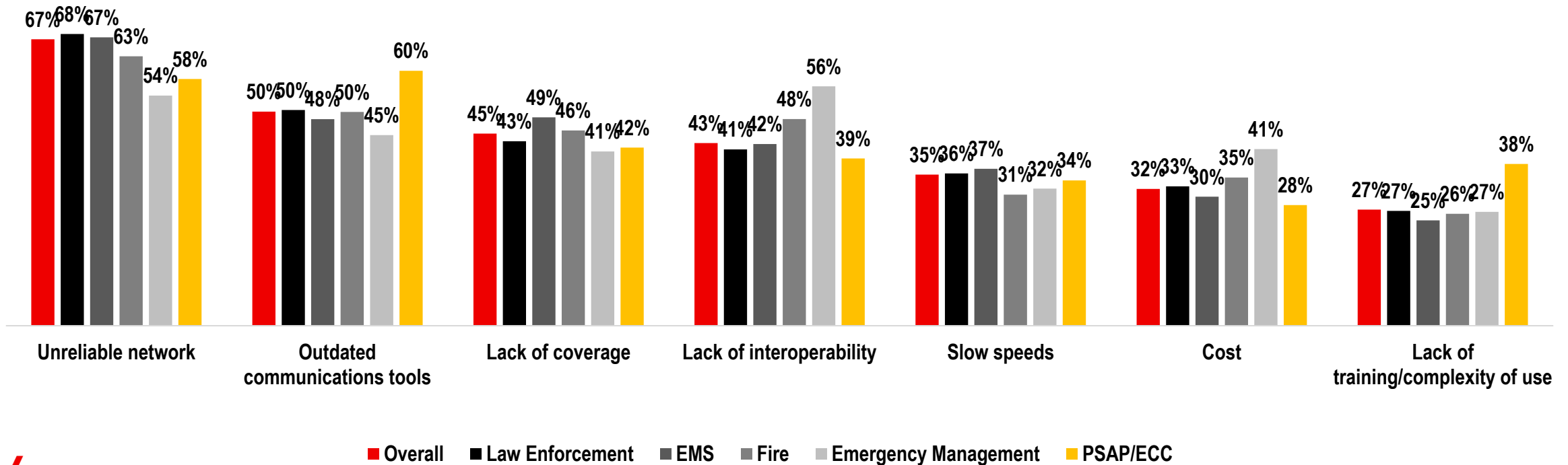
Which of the following is MOST important to you in your day-to-day professional communications?



TECH ON THE JOB

In both 2022 and 2023, unreliable networks and outdated tools were selected by first responders as two of their top three concerns related to current public safety communications technology. Most first responders believed lack of coverage was a larger concern than lack of interoperability. However, PSAP/ECCs responders ranked lack of interoperability as a greater concern than lack of coverage.

What are your top 3 concerns regarding current public safety communications technology?



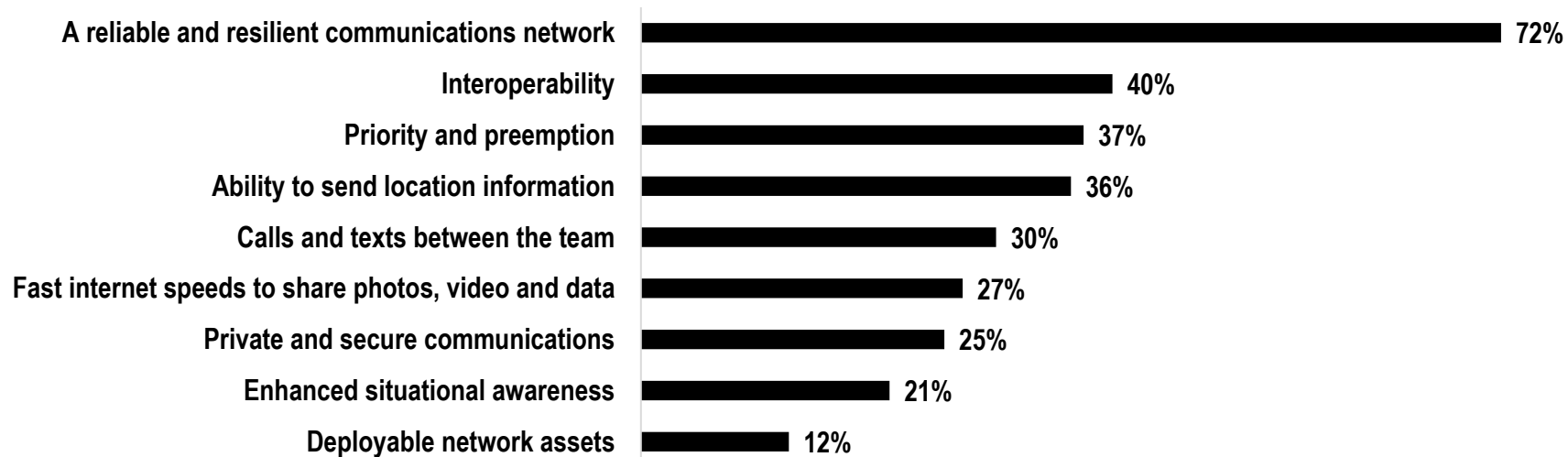
Emergency Preparedness and Response



EMERGENCY PREPAREDNESS AND RESPONSE

The most crucial consideration during emergencies, as indicated by nearly three-quarters of the respondents, is a reliable and resilient network. Interoperability and preemption were respectively the second and third most important. The ability to send location information increased by 6 percentage points and team call and text communications increased by 3 percentage points this year as compared to perceived importance last year.

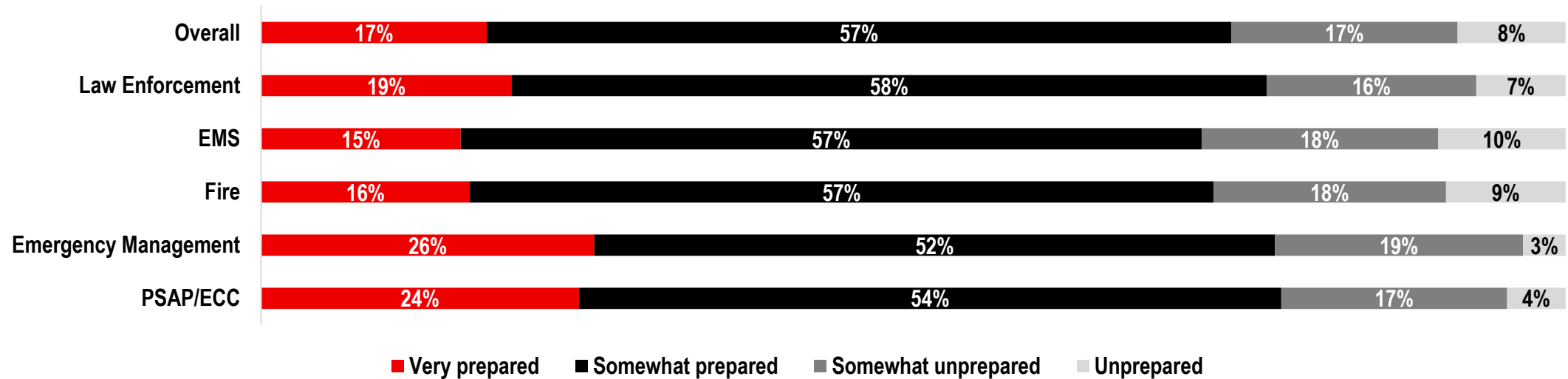
Which 3 of the following are MOST important to you when communicating during an emergency response operation? (select three)



EMERGENCY PREPAREDNESS AND RESPONSE

Most first responders believe their agency is somewhat prepared, technology-wise, to immediately respond to a natural disaster or crisis.

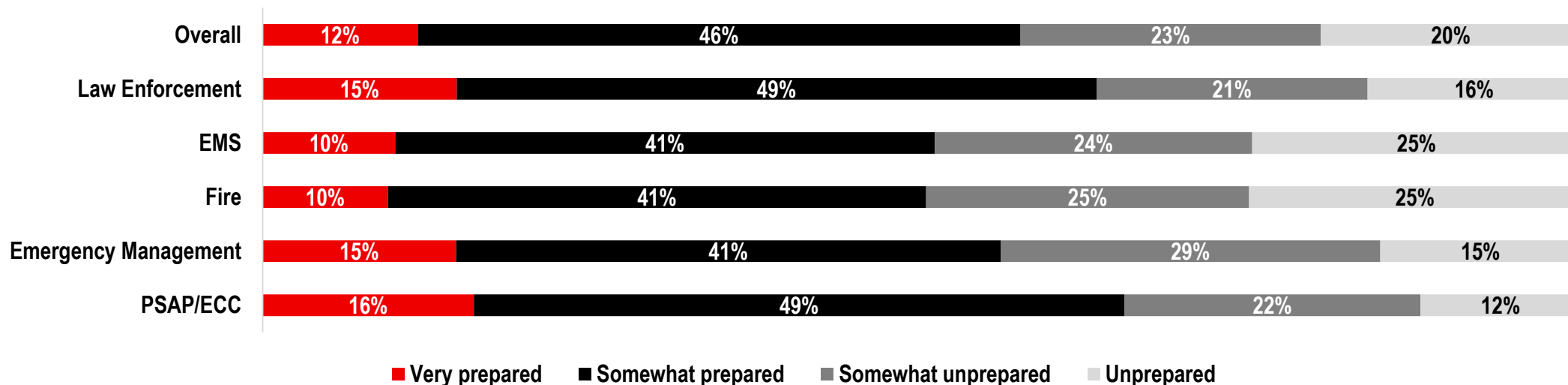
If a natural disaster or crisis occurred today, how prepared is your agency technology-wise to immediately respond and address the health and safety of your community?



EMERGENCY PREPAREDNESS AND RESPONSE

Across agencies, almost 46% of first responders feel somewhat prepared for a cyberattack. Law enforcement and EMS workers feel the most prepared. Still, 43% of all respondents feel somewhat or completely unprepared, and even more so now (20% unprepared) than last year (5% unprepared).

If a cyberattack were to happen today, how prepared is your agency?



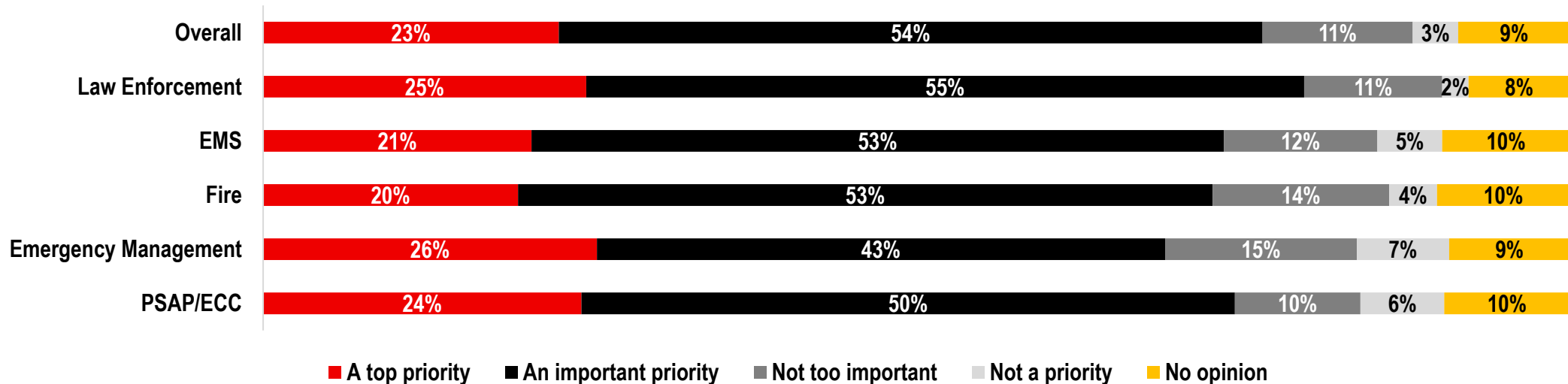
The Future of 5G



THE FUTURE OF 5G

First responders continue to overwhelmingly see 5G as an important priority for the future of public safety. Overall, the number of first responders who view 5G as a top priority increased by 5 percentage points. Especially for law enforcement and PSAP/ECC where 5G as a top priority increased 6 percentage points each.

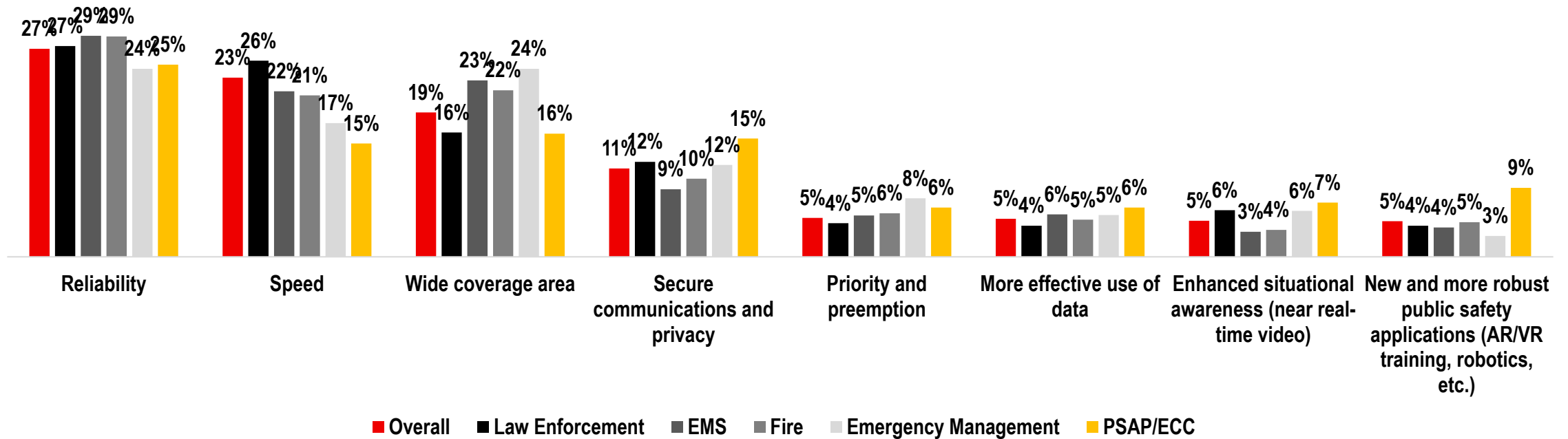
How important do you think 5G will be to the future of public safety?



THE FUTURE OF 5G

First responders consider the top benefits of 5G to be reliability, speed and wide coverage. Meanwhile "more effective use of data" and "enhanced situational awareness" fell by more than 50% YOY.

Which do you think will be the most important benefit of 5G for public safety?



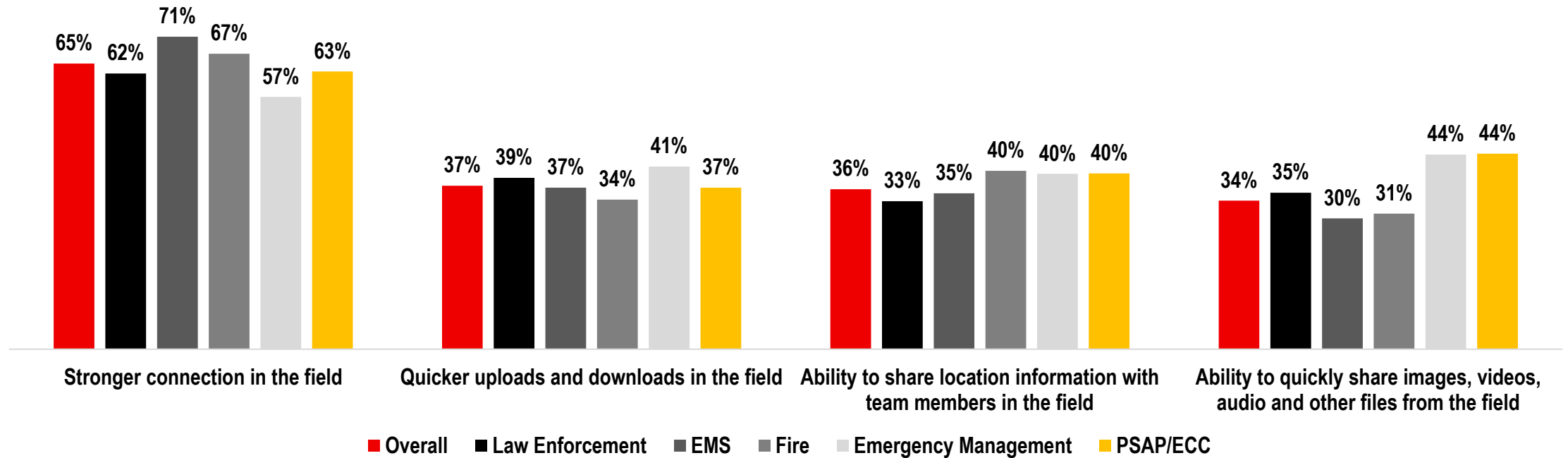
Looking Ahead



LOOKING AHEAD

65% of first responders wish for a stronger connection in the field. Quicker uploads/downloads surpassed “the ability to share location information”, but both saw percentage decreases compared to last year. Ability to share location dropped 6 percentage points and quicker uploads dropped 2 percentage points.

What features would you like but aren't getting with your current communications technology?



LOOKING AHEAD

Internet-connected vehicles remain a top priority for public safety agencies (27% this year vs 37% last year), followed by 5G network services.

Which of these technologies would you consider a top priority for your department?

