

Verizon Frontline 2024 Public Safety Communications Survey

Taking the pulse of public safety communications

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Key Findings

Now in its fourth year, the annual Verizon Frontline Public Safety Communications Survey puts a spotlight on current and future first responder technology use.

Here are a few key takeaways from this year's report:

- Access to a reliable and resilient network grew in importance year-over-year as the feature most valued by first responders for both day-to-day (51% to 65%) and emergency response (51% to 64%) communications.
- While AI/smart solutions are not yet widely deployed, 50% did state that this technology will be either “important” or “a top priority” in the future.
- Close to a quarter (23%) of all first responders believe that enhancing situational awareness will be the most important benefit of AI/smart solutions.
- Nearly 50% of all first responders only feel “somewhat prepared” if a natural disaster were to happen today.
- Over a third (39%) believe that 5G connectivity will be the technology most important to public safety’s future.

Overview

Methodology

- This survey was conducted by Lexipol on behalf of Verizon Frontline in July 2024 among a national sample of 1,659 first responders (EMS, Fire, Police, Emergency Management, and Public Safety Answering Point/Emergency Communications Center).

Target Survey Audience & Demographics

- Self-selected as member of Emergency Medical Services (35%), Fire (37%), Law Enforcement (36%), Emergency Management (12%), and PSAP/ECC (18%) with the ability to choose multiple agencies.
- The largest respondent group (36%) had more than 25 years of experience, followed by those with 11-25 years of experience (30%).

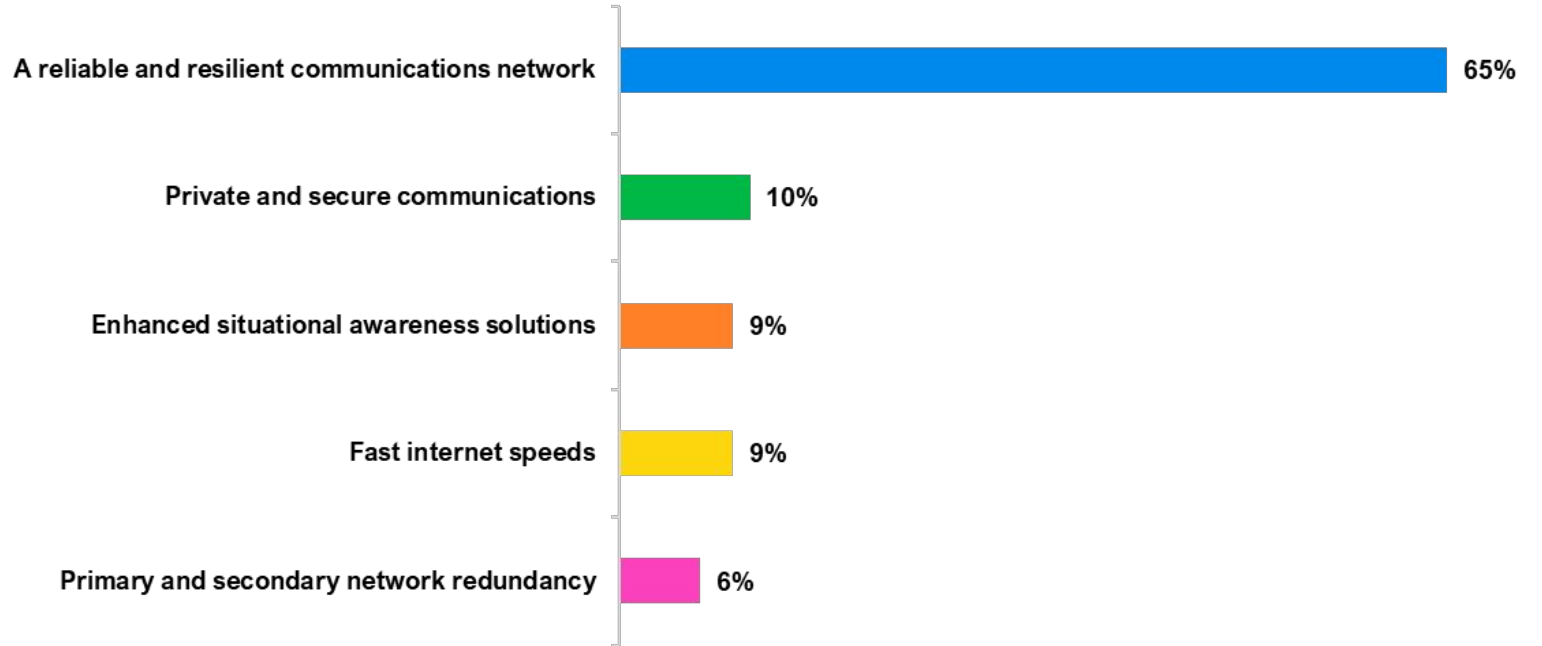
Public Safety Tech On the Job

A reliable and resilient network remains the feature most critical to meeting professional communication needs

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

Respondents identified a "reliable and resilient communications network" as the feature most important to effective day-to-day professional communications. In 2024, the percentage of respondents rating this feature as "most important" increased by 14 points from 2023.

"Private and secure communication" and "enhanced situational awareness solutions" both grew by three percentage points while "fast internet speeds" remained flat.

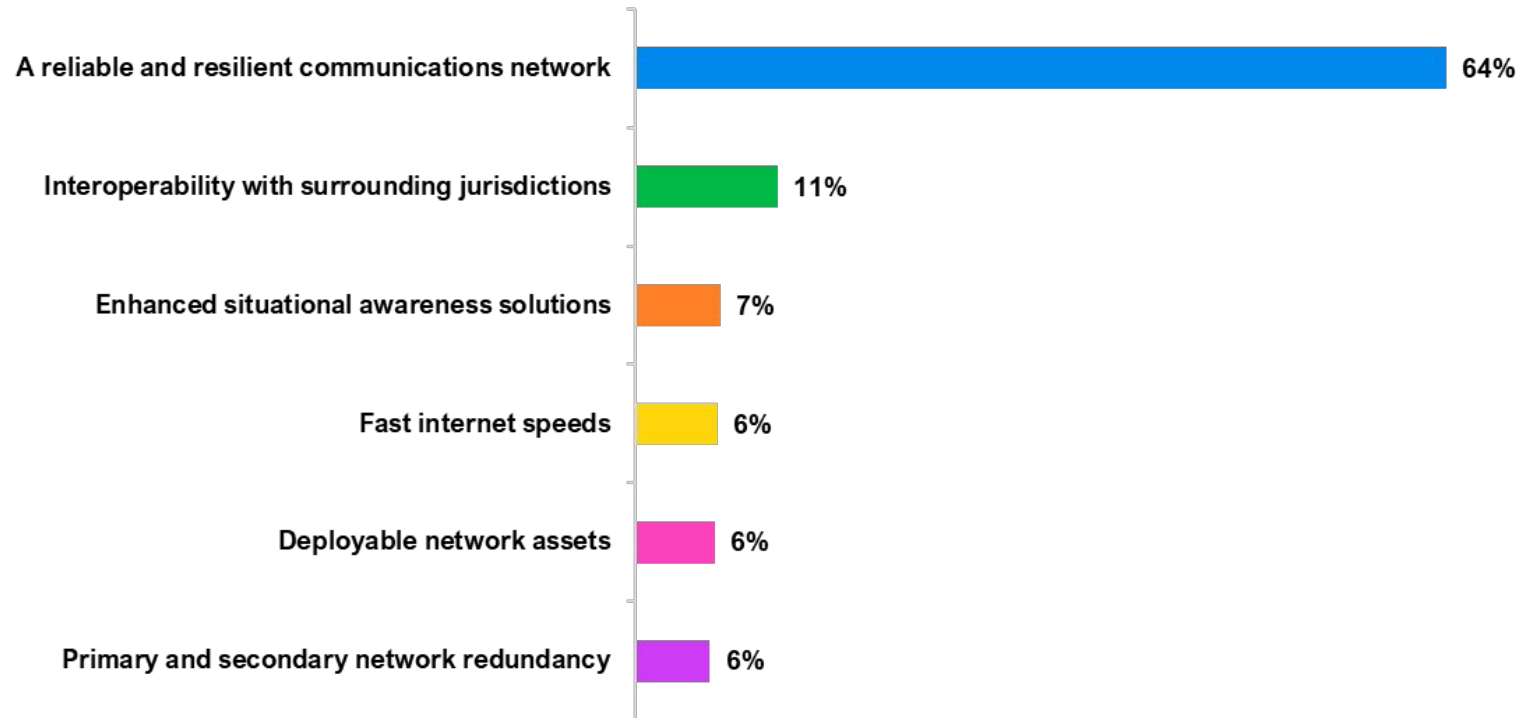


Source: Lexipol.

First responders rate a reliable and resilient network as the most important communications need during emergency response

Which of the following is MOST important to you when communicating during emergency response operations?

Respondents also value a reliable and resilient network during emergency response operations, which is consistent with last year's results. There was a 13-percentage point increase compared to last year, indicating an increased dependence on reliable and resilient networks.

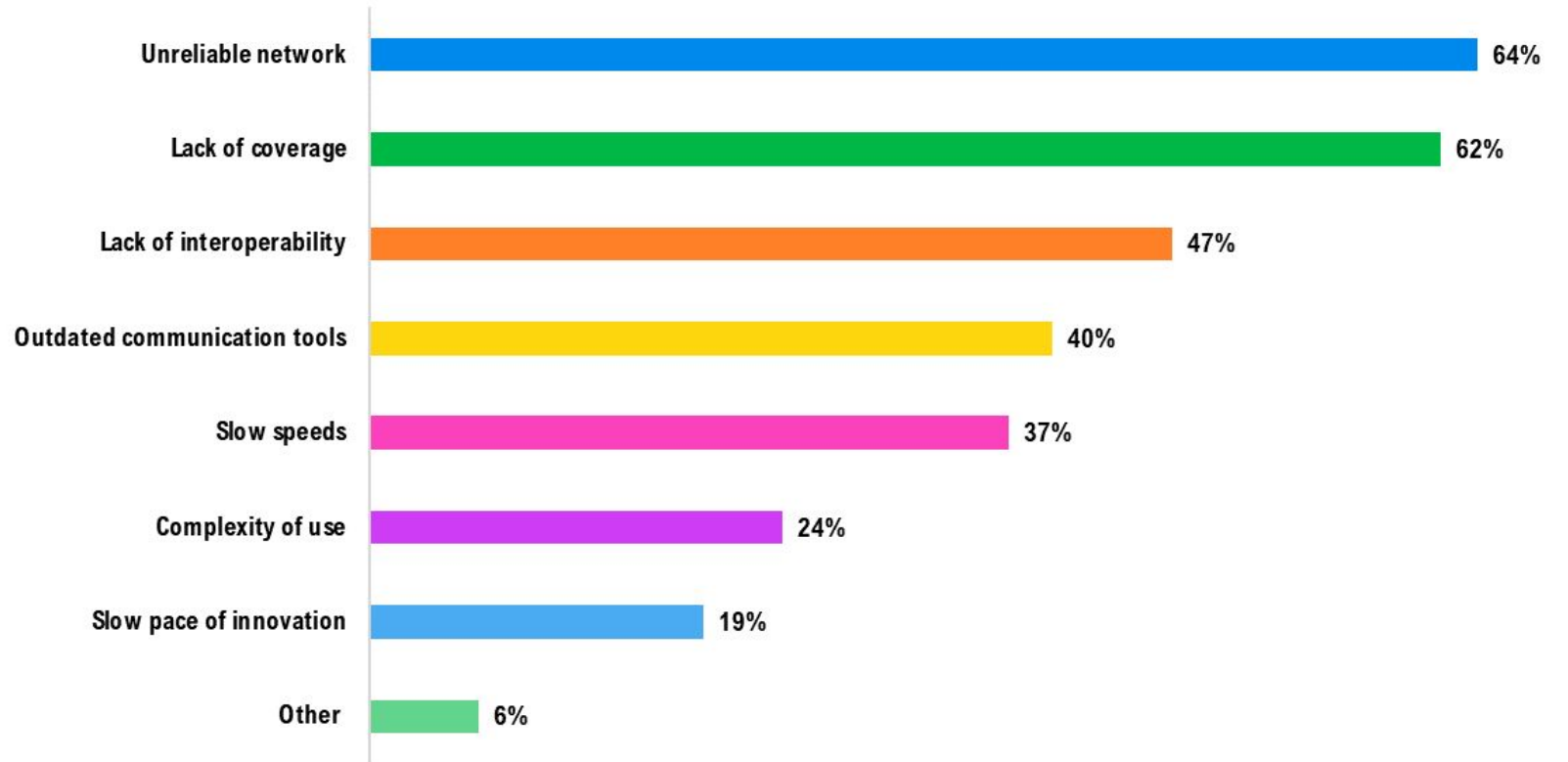


Source: Lexipol.

First responders worry most about unreliable networks, lack of coverage and lack of interoperability

What are your top three concerns regarding current public safety communications technology? (select three)

Unreliable networks remain first responders' main concern. Lack of coverage rose to second with lack of interoperability coming in at third. Outdated communications tools, one of the main concerns last year, fell out of the top three.



Source: Lexipol.

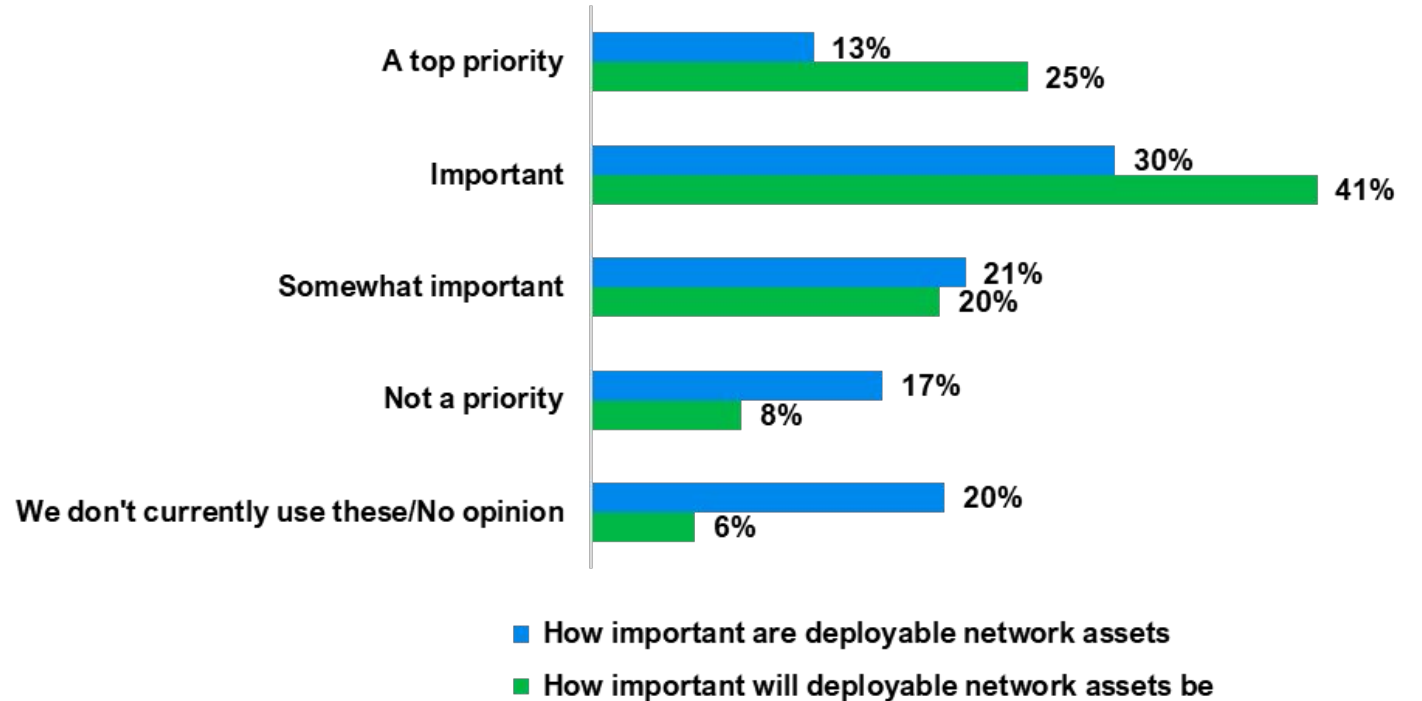
Public safety values deployable assets

How important are deployable network assets, such as portable satellite assets or cells on wheels (COWs), for the work you do?

How important do you think deployable network assets will be to the future of public safety?

Most first responders believe deployable assets are currently important and will continue to be important in the future.

43% of respondents replied that deployable assets are currently important or a top priority and 66% think they will become important or a top priority for public safety in the future.



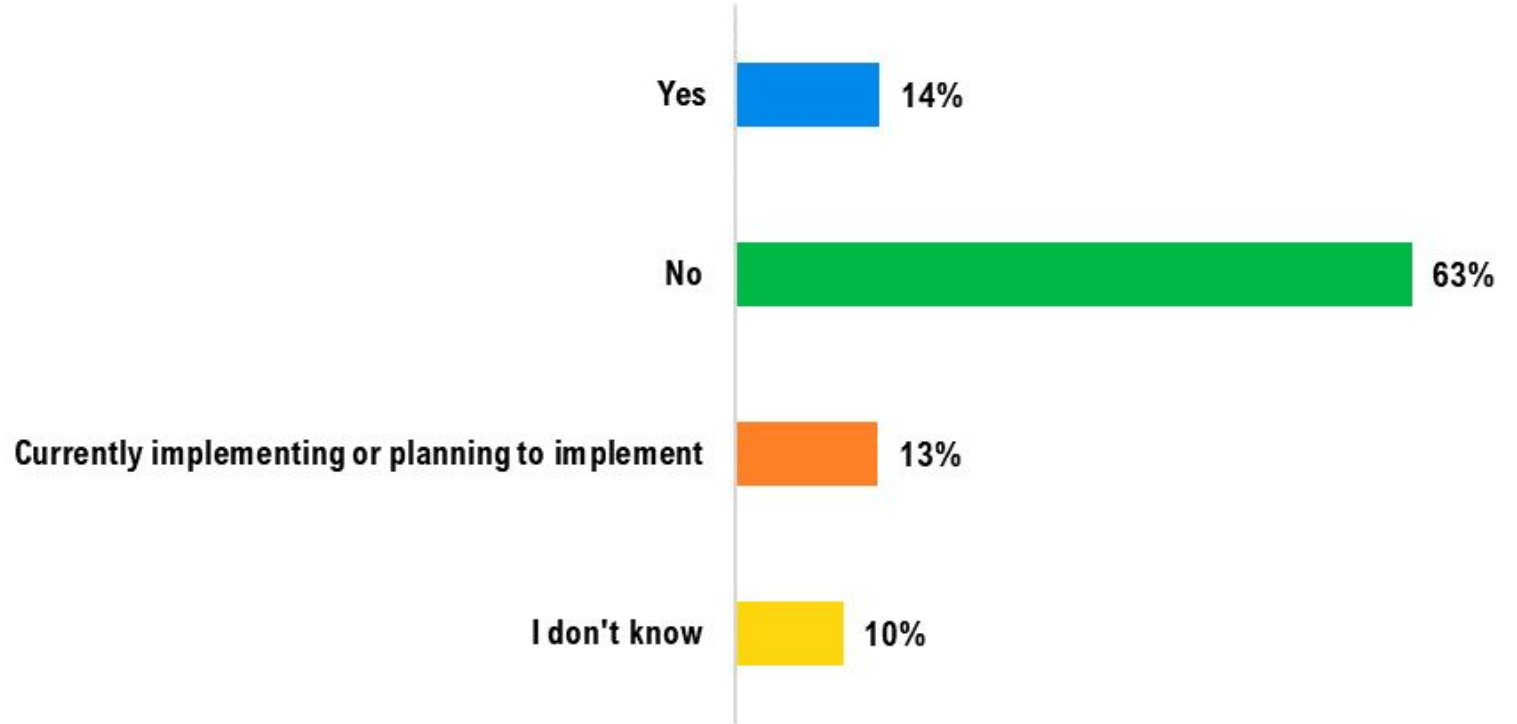
Source: Lexipol.

Roughly 30 percent of public safety agencies currently use or are planning to implement AI or smart solutions

Does your primary agency currently use AI or smart solutions?

63% of first responders report that they do not use AI/smart solutions at their primary agency. However, over a quarter of all respondents use, plan to use, or are actively implementing AI solutions.

PSAP/ECC professionals are most likely to use AI/smart solutions at 29%.



Source: Lexipol.

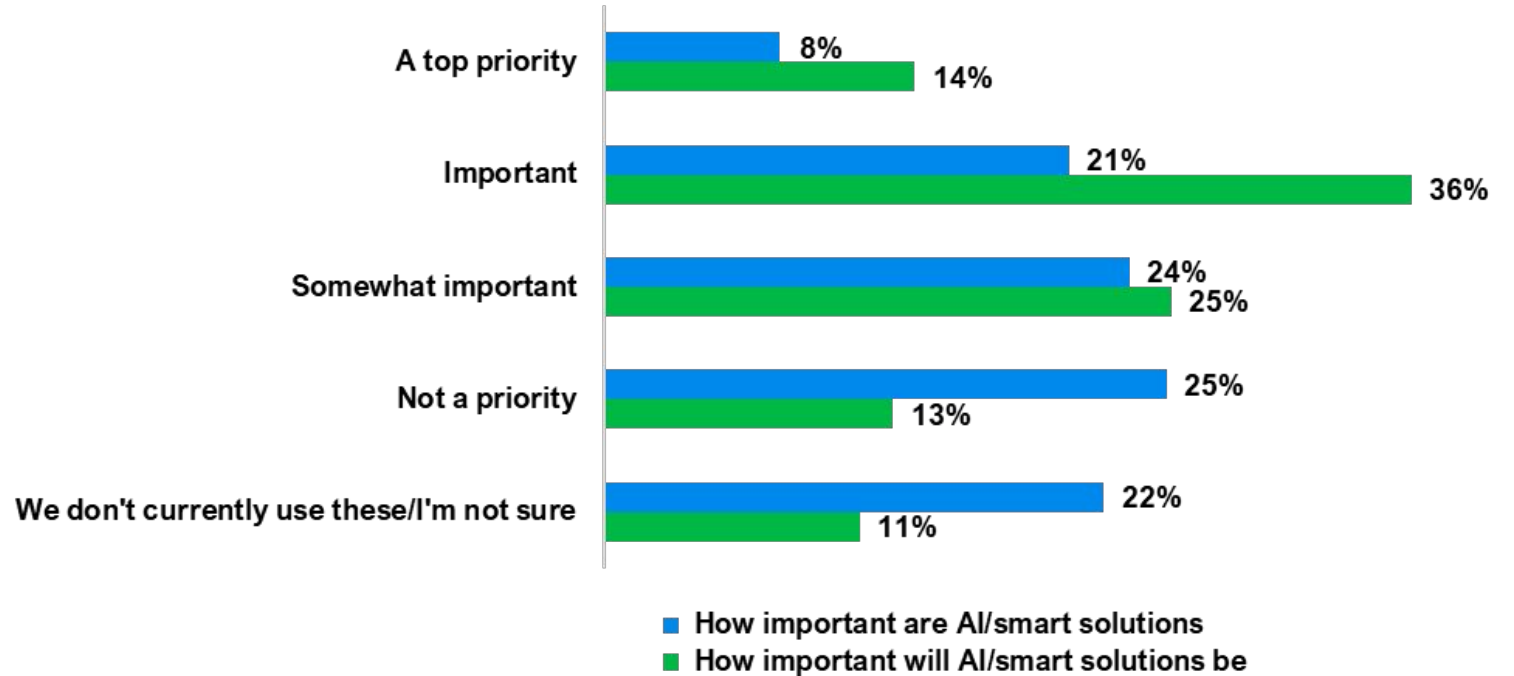
Importance of AI/smart solutions expected to significantly increase in the future

How important are AI/smart solutions for the work you do?

How important do you think AI/smart solutions will be to the future of public safety?

Currently, AI is not widely seen as a top priority in public safety, but there is a clear expectation that its importance will grow significantly in the future.

Nearly 30% of first responders consider AI/smart solutions a top priority or important. The percentage of respondents who see AI as a top priority increases from 8% now to 14% when looking towards the future.



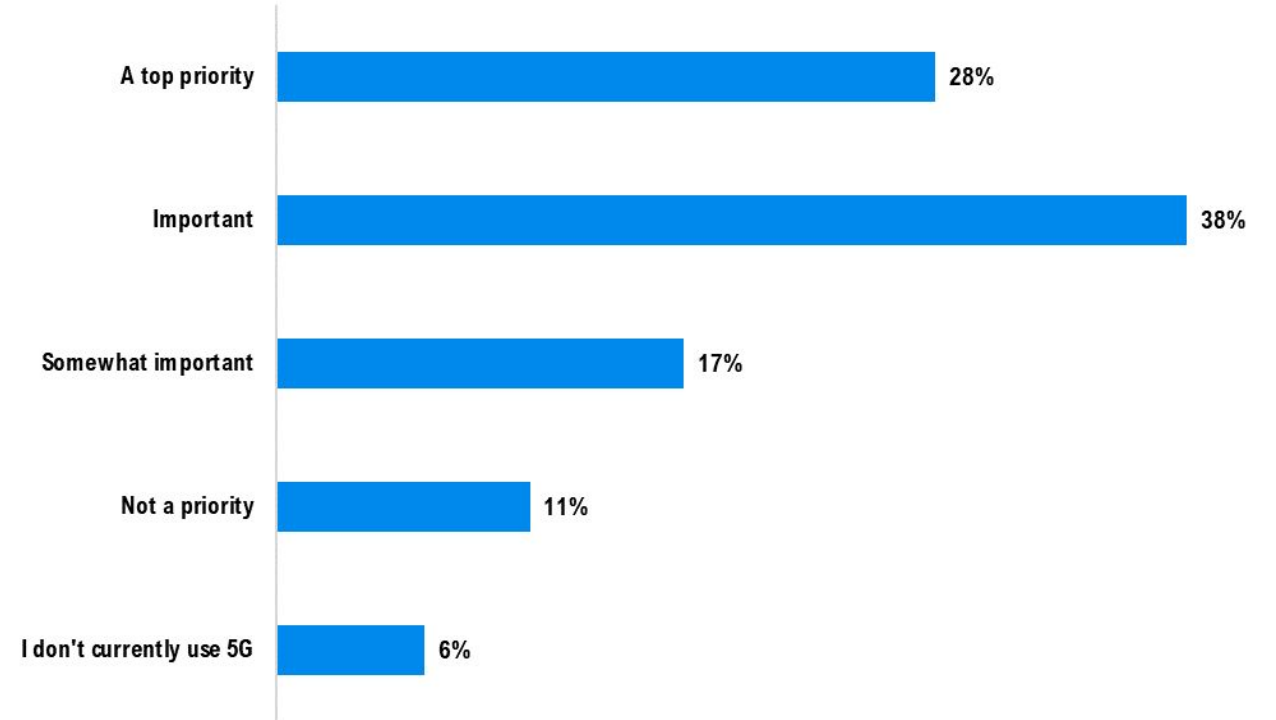
Source: Lexipol.

Connectivity and 5G

5G connectivity is important to most first responders

How important is 5G for the work you do?

5G connectivity is seen as crucial for most first responders. 66% of first responders see 5G as either a top priority or important for their work.



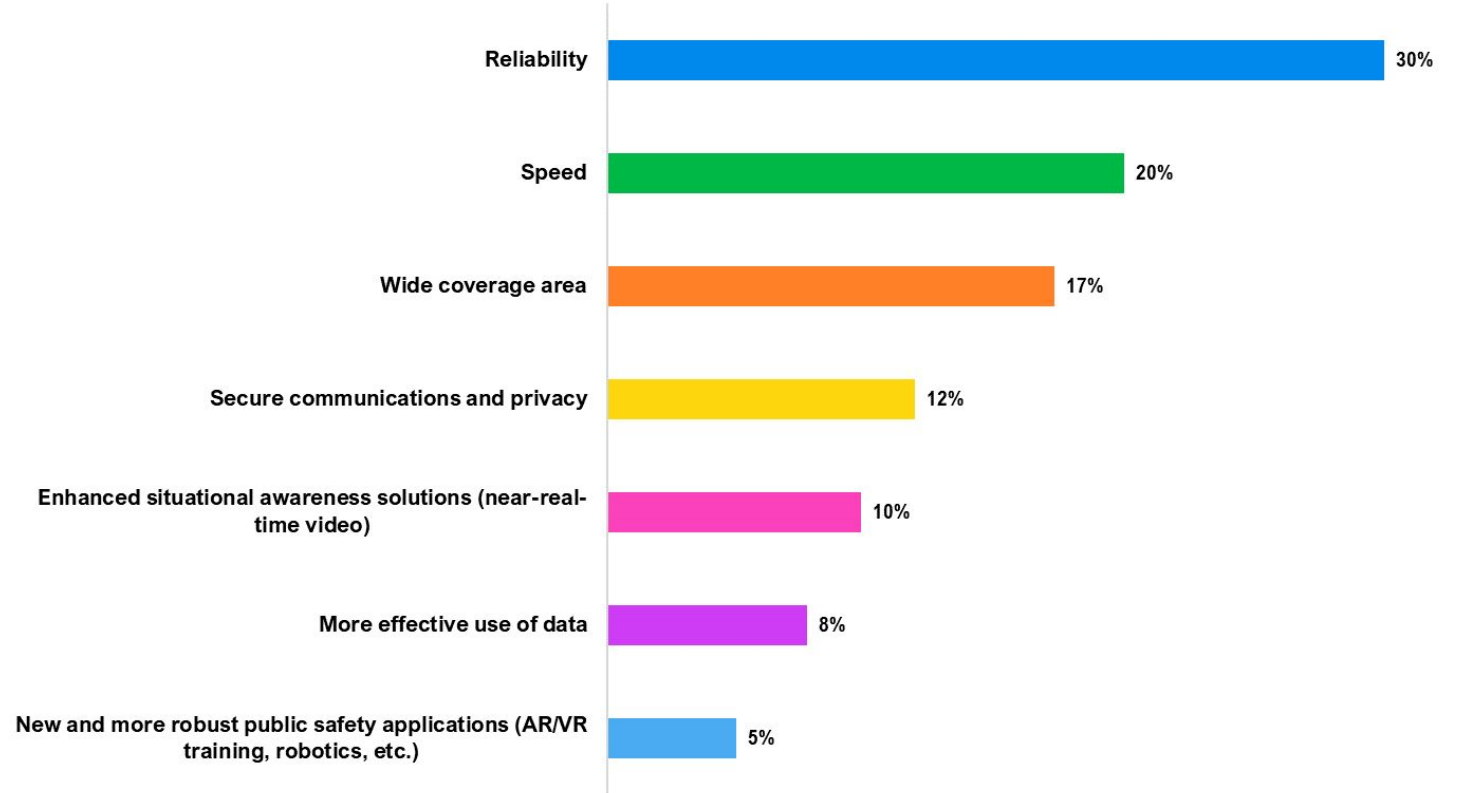
Source: Lexipol.

First responders rate reliability and speed as the most important benefits of 5G

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

Reliability remains the top benefit of 5G for public safety professionals and it saw percentage increases across all professions except PSAP/ECC. Speed and coverage area also remained in the top three.

30% of respondents agreed that reliability was the most important benefit of 5G while 20% agreed that speed was the most important benefit.



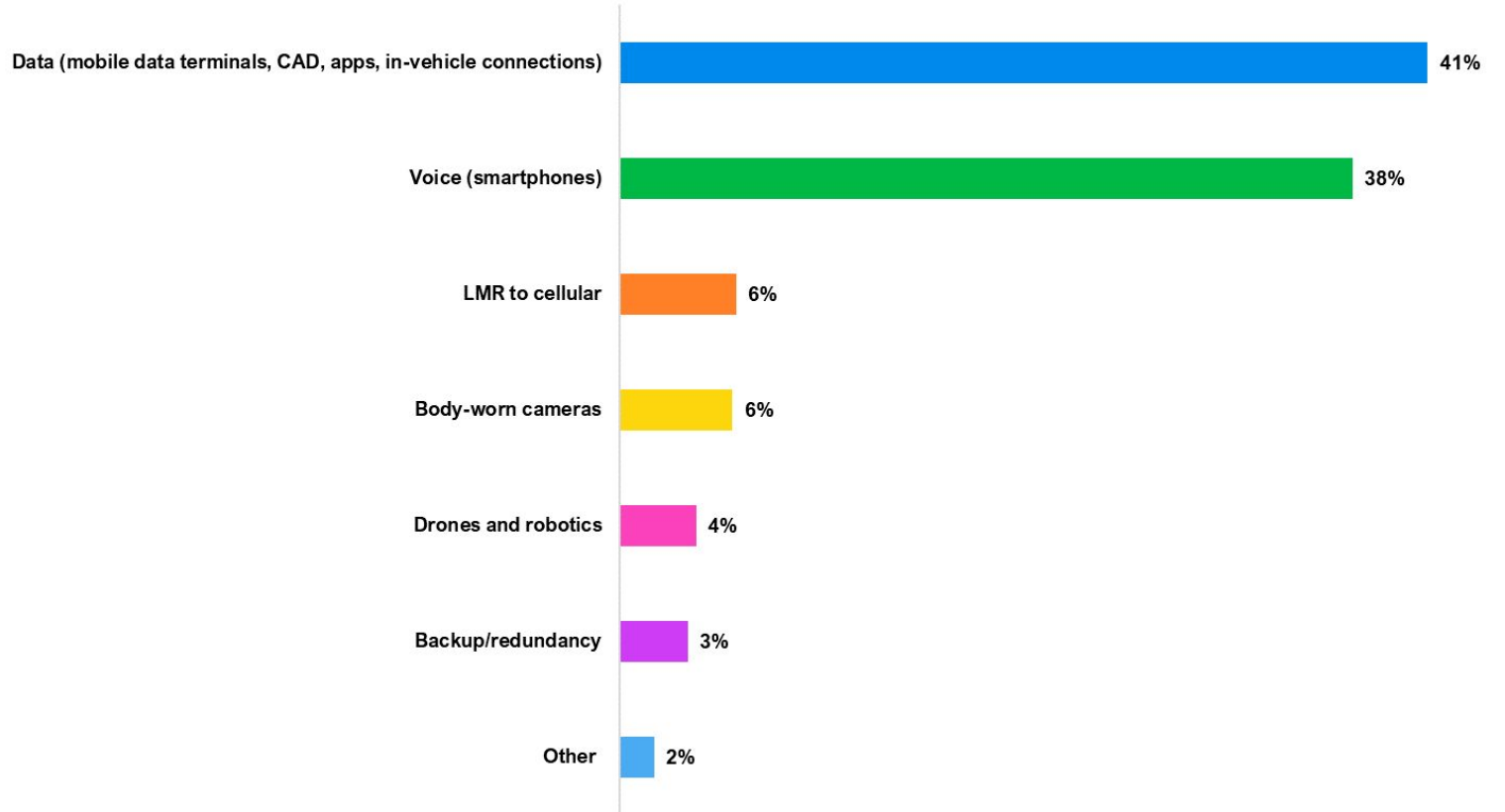
Source: Lexipol.

Results indicate voice and data are respondents' most used cellular connectivity features

For which of the following do you MOST use cellular connectivity in your professional communications?

Among 5G features, 38% of respondents most use voice (smartphones), while 41% most use data (mobile data terminals, CAD, in-vehicle connections).

The third most selected option was Land Mobile Radios to cellular, which only 6% selected as their most used form of cellular connectivity at work.



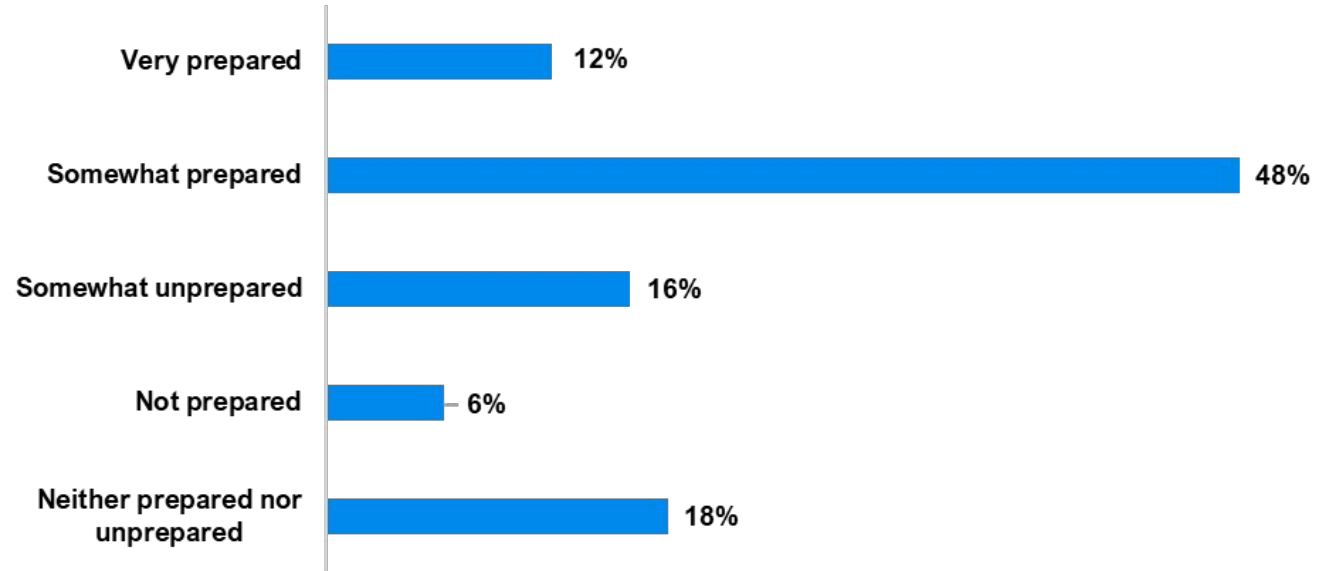
Source: Lexipol.

Emergency Prep & Readiness

Most first responders feel only “somewhat prepared” from a tech standpoint if a natural disaster occurred today

If a natural disaster or crisis occurred today, how prepared is your agency or department from a technology standpoint?

Nearly 50% of all first responders only feel somewhat prepared. In 2024, 60% of respondents felt somewhat or very prepared technology-wise for a natural disaster or crisis, down from 69% in 2022.



Source: Lexipol.

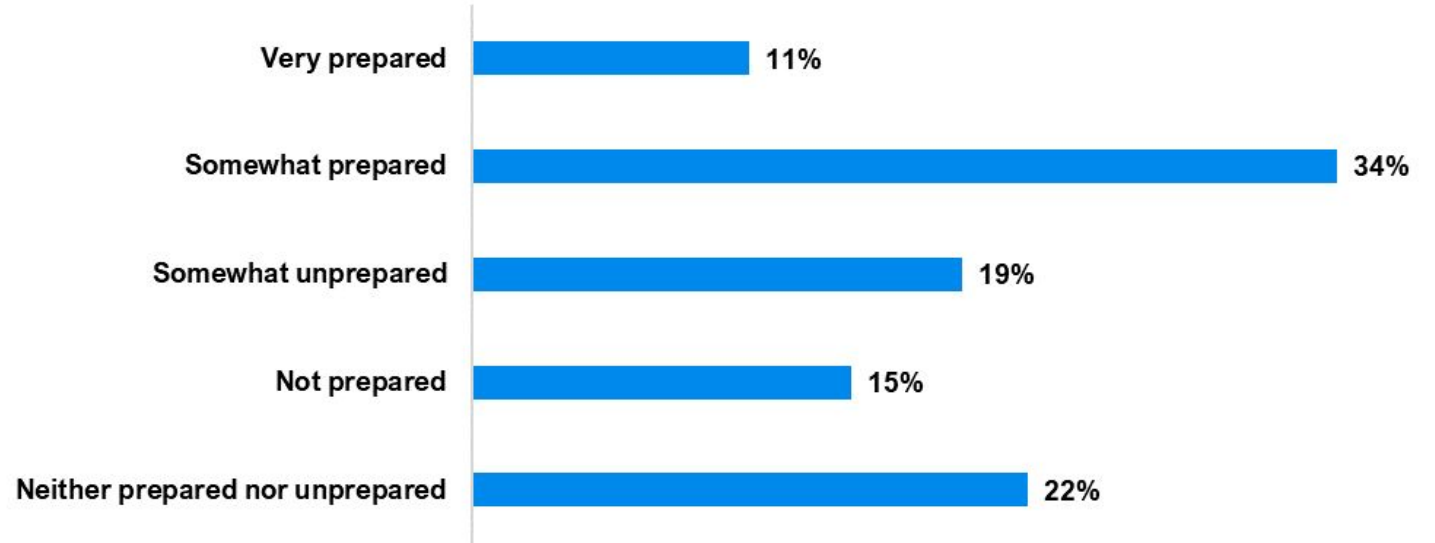
Most first responders would only feel “somewhat prepared” if a cyber attack occurred today

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

Feelings of preparedness for a cyberattack have mostly remained the same since 2022. In 2024, most respondents still only feel somewhat prepared.

In 2024, 45% of respondents felt somewhat or very prepared for a cyberattack, consistent with 46% in 2022. 41% of respondents felt somewhat unprepared or neutral about their preparedness for a cyberattack this year, up from 35% in 2022.

15% of respondents this year reported they felt not prepared for a cyberattack, a slight decrease from 2022’s 19%.



Source: Lexipol.

Future of Public Safety Tech

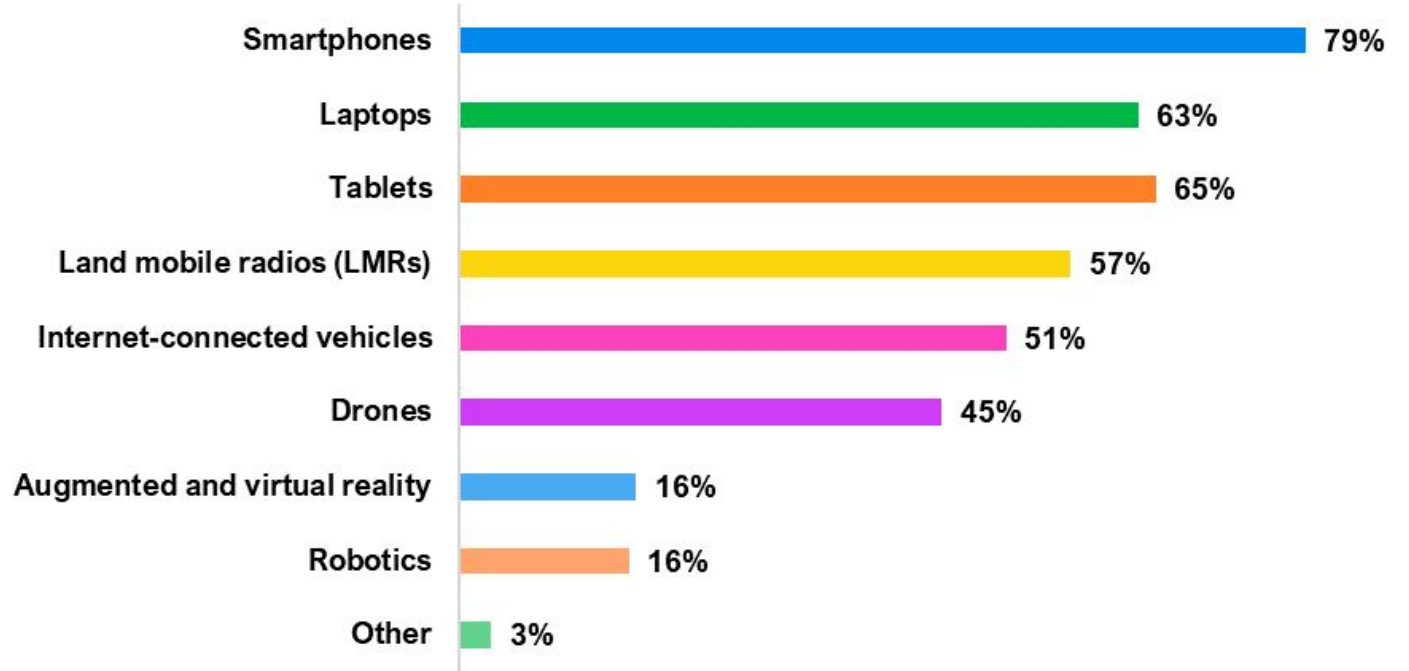
Most respondents still expect to be using smartphones, tablets and laptops on a daily basis five years from now

Which of the following technologies do you expect to use on a daily basis five years from now? (select all that apply)

Smartphones remain the top tool first responders expect to use on a daily basis in the future. Tablets and Laptops were #2 and #3, pushing Land Mobile Radios (LMRs) (previously #2) out of the top 3.

The usage of LMRs decreased from 79% in 2022 to 69% in 2023 and 57% in 2024, indicating a reduced reliance on these devices.

Smartphone adoption drops from 91% in 2022 to 84% in 2023 and 79% in 2024, showing a decrease in their dominance. Meanwhile, tablet usage remains steady at approximately 68% in 2022, 65% in 2023, and 65% in 2024, demonstrating consistent usage. Laptop usage also shows minimal fluctuation.



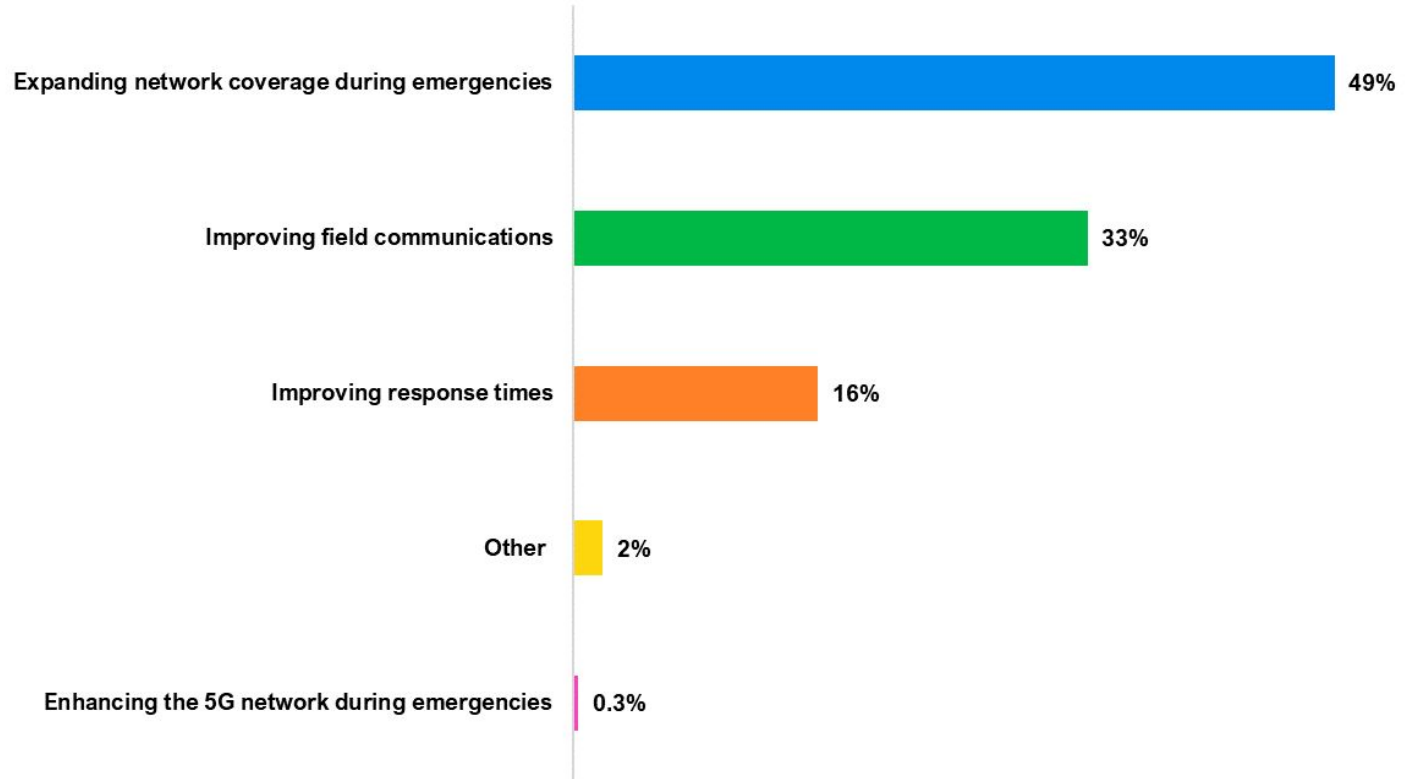
Source: Lexipol.

First responders believe expanded network coverage and improved field comms will be the most important benefits of deployable assets

Which do you think will be the most important benefit of deployable assets for public safety?

First responders prioritize practical improvements in communication and connectivity during emergencies over advanced technologies like enhanced 5G.

49% of respondents view expanding network coverage during emergencies as the most important benefit of deployable assets. In contrast, only 0.3% of respondents view an enhanced 5G network as the most important benefit.



*Data labels next to smaller bars indicate Overall

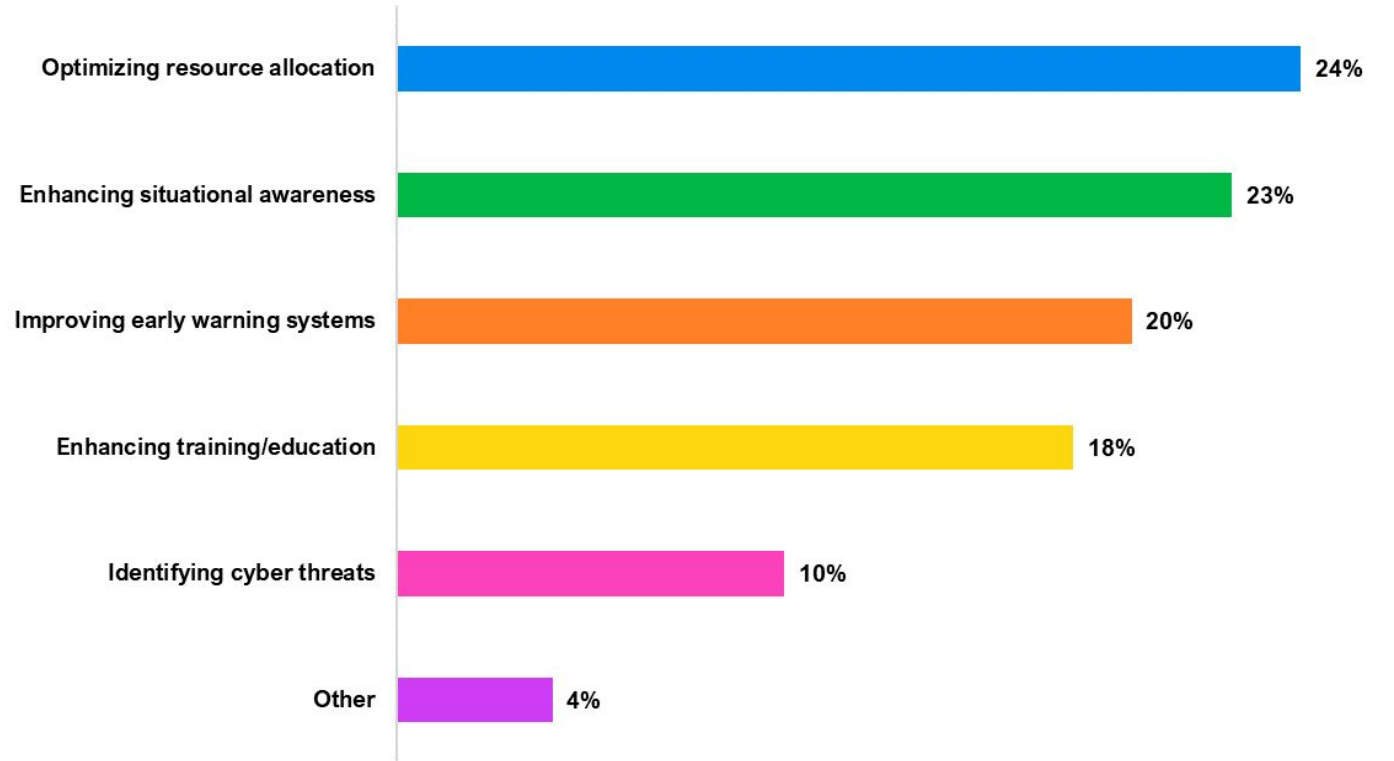
Source: Lexipol.

First responders believe optimized resource allocation and enhanced situational awareness will be the most important benefits of AI/smart solutions

Which do you think will be the most important benefit of AI/smart solutions for public safety?

Nearly a quarter of most professionals believe AI or smart solutions will be most important for optimizing resource allocation, making their existing tasks more efficient.

Only 10% of respondents believe the most important role of AI will be to identify cybersecurity threats for them, indicating a preference for broader use cases that support rather than take over primary duties.



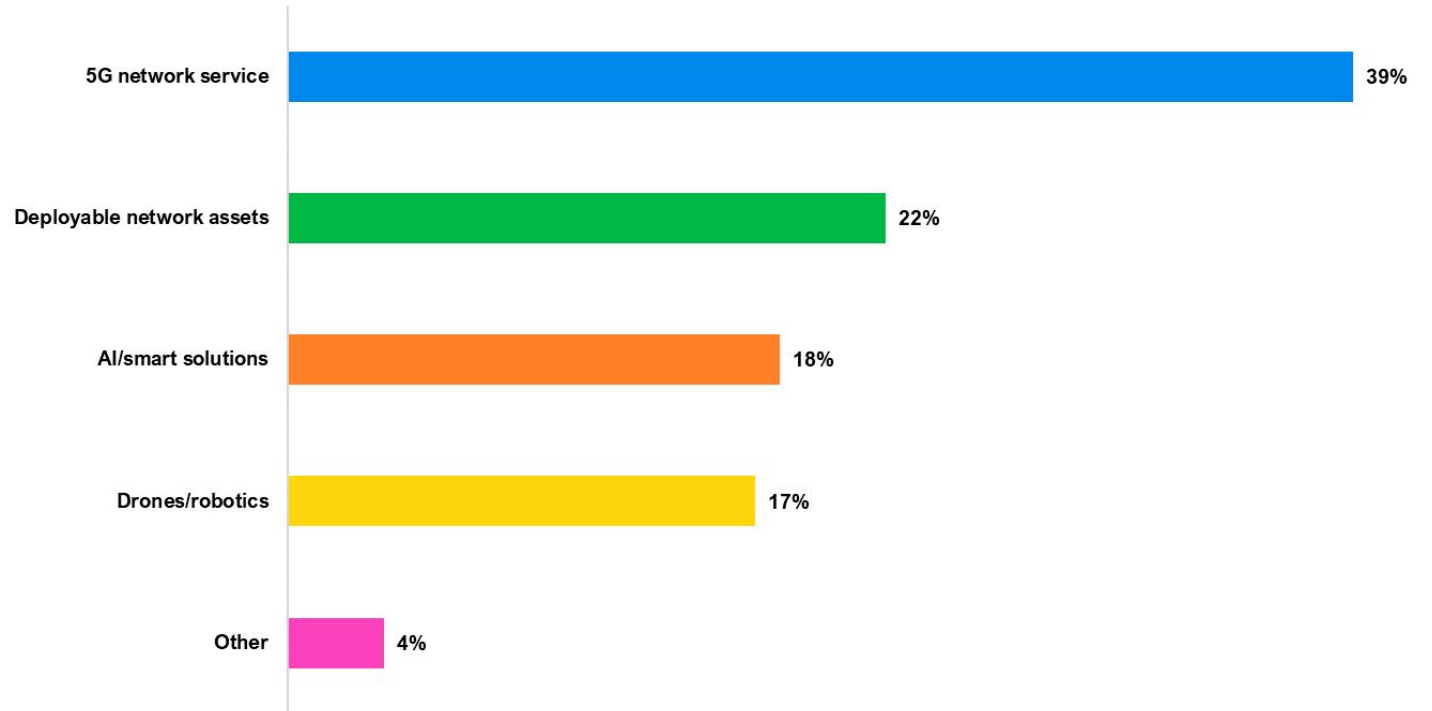
Source: Lexipol.

Respondents expect 5G network services and deployable assets to be most important to the future of public safety

What technology do you think will be most important to the future of public safety?

39% of all professionals believe 5G service is most important to public safety's future.

The importance of 5G network service shows growth year-over-year, increasing from 3% in 2022 to 8% in 2023 and, finally, to 39% in 2024.



Source: Lexipol.

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