Verizon Frontline
Public Safety Communications Survey

Methodology

This survey was commissioned by Lexipol on behalf of Verizon Frontline among a national sample of 1,825 first responders (Fire, EMS, Police and PSAP/ECC).

Target Survey Audience & Demographics

- Self-selected as either a member of Police, Fire, EMS or PSAP
- Nearly 80% have been on the force for 10 years or more
- Over 60% of respondents are an influencer in technology decision making
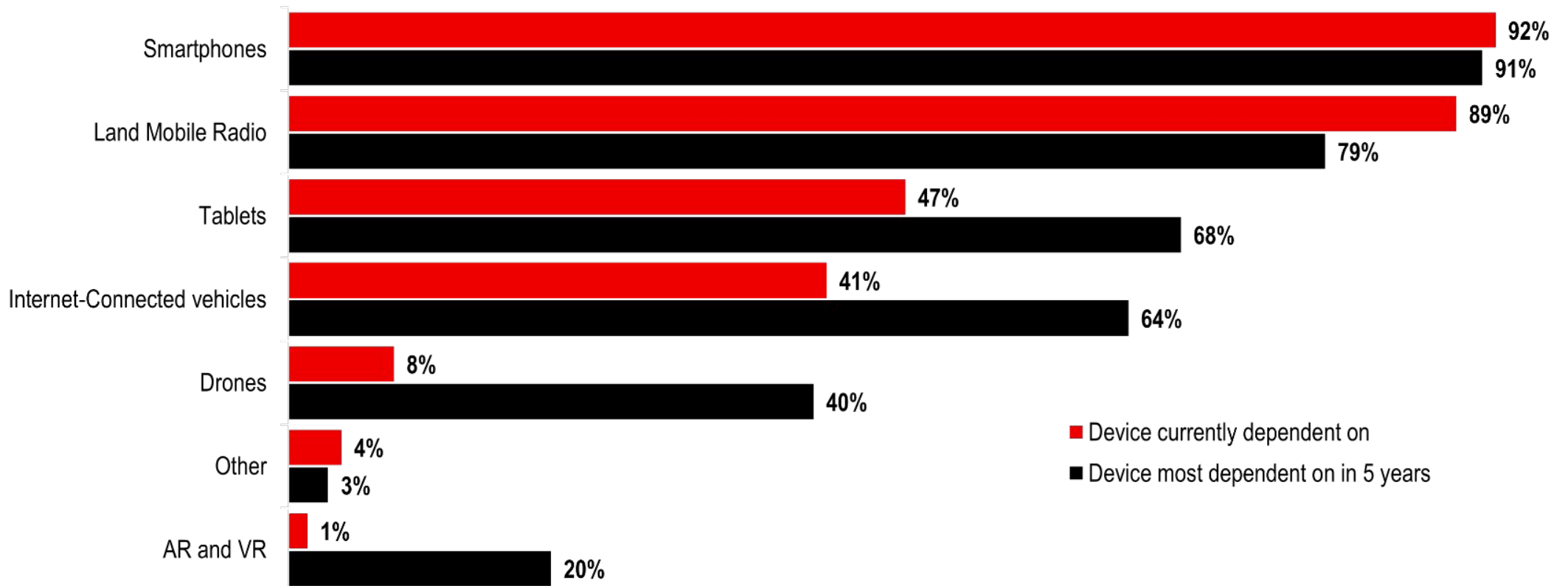
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Tech on the Job

TECH ON THE JOB

Based on survey results, first responders believe smartphones and tablets will remain daily communication tools during the next five years and see new technology becoming increasingly useful. Internet-connected vehicles, drones, tablets and AR and VR are four tools that first responders believe they will become more dependent on.

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?

Tool	Device currently dependent on	Device most dependent on in 5 years
Smartphones	92%	91%
Land Mobile Radio	89%	79%
Tablets	47%	68%
Internet-Connected vehicles	41%	64%
Drones	8%	40%
Other	4%	3%
AR and VR	1%	20%

■ Device currently dependent on
■ Device most dependent on in 5 years

TECH ON THE JOB

Based on survey results, network reliability and speed are the most important factors for first responders when selecting a public safety communications provider and are expected to remain the most important factors over the next five years. In the next five years, first responders may also become more swayed by costs when making network provider decisions.

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?
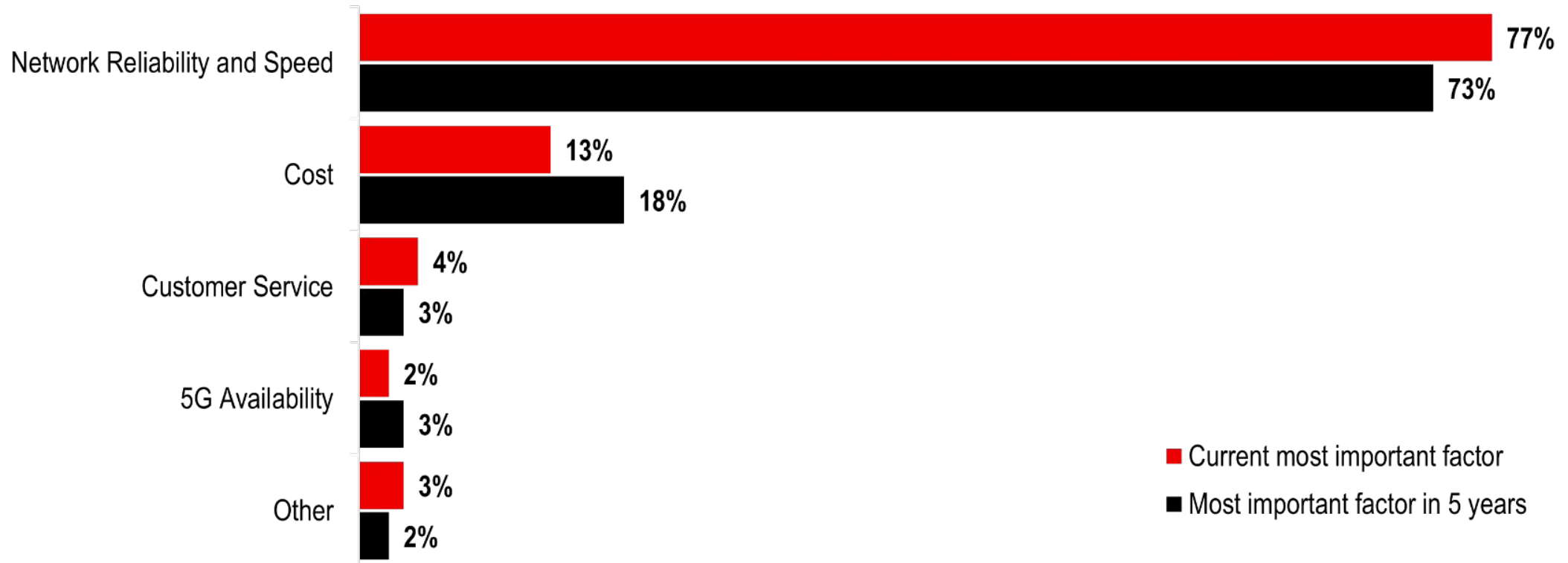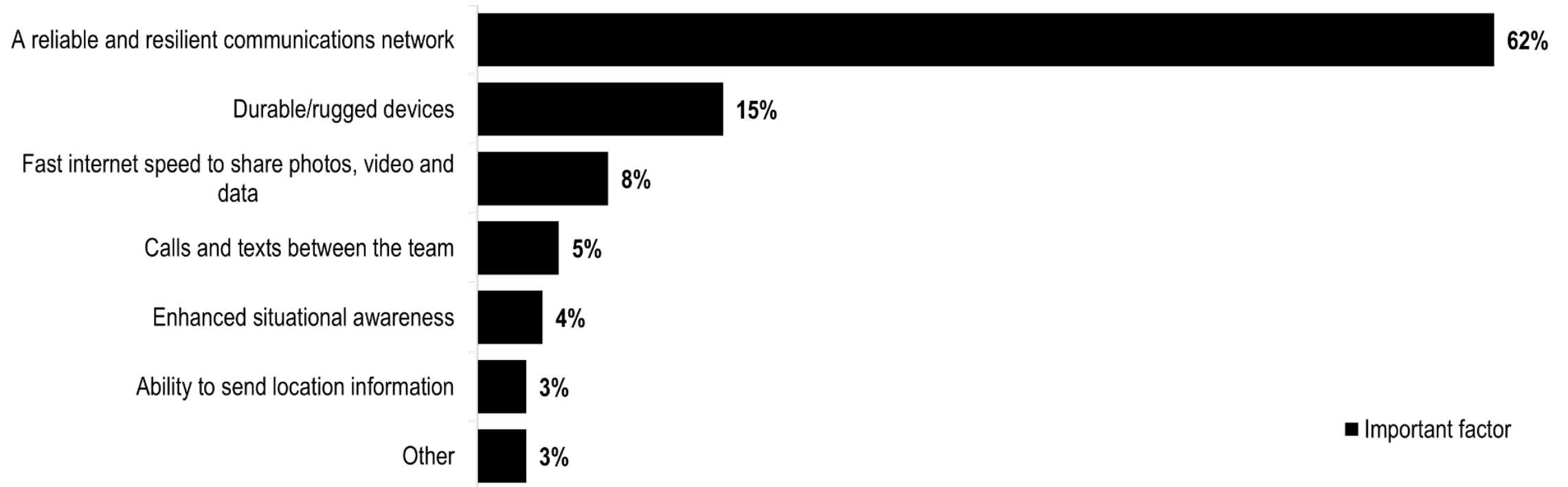
TECH ON THE JOB

In their day-to-day professional communications first responders say a reliable and resilient network is most important to them. Other factors noted include durable devices 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?

Factor	Percentage
A reliable and resilient communications network	62%
Durable/rugged devices	15%
Fast internet speed to share photos, video and data	8%
Calls and texts between the team	5%
Enhanced situational awareness	4%
Ability to send location information	3%
Other	3%

■ Important factor

TECH ON THE JOB

Overall, an unreliable network, outdated tools and lack of interoperability are the top three concerns first responders shared about current public safety communications technology. Lack of interoperability was noted as of particular concern for PSAP/ECC respondents and cost was noted as more of a concern for fire departments than for other agencies.

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

Legend: ■ Overall ■ EMS ■ Fire ■ Law Enforcement ■ PSAP/ECC

Unreliable Network: 35%, 27%, 25%, 25%, 21%
Outdated Tools: 26%, 17%, 18%, 21%, 19%
Lack of Interoperability: 23%, 18%, 18%, 16%, 20%
Cost: 19%, 14%, 17%, 14%, 13%
Slow Connection: 19%, 14%, 12%, 15%, 12%
Lack of Training: 13%, 10%, 11%, 9%, 15%
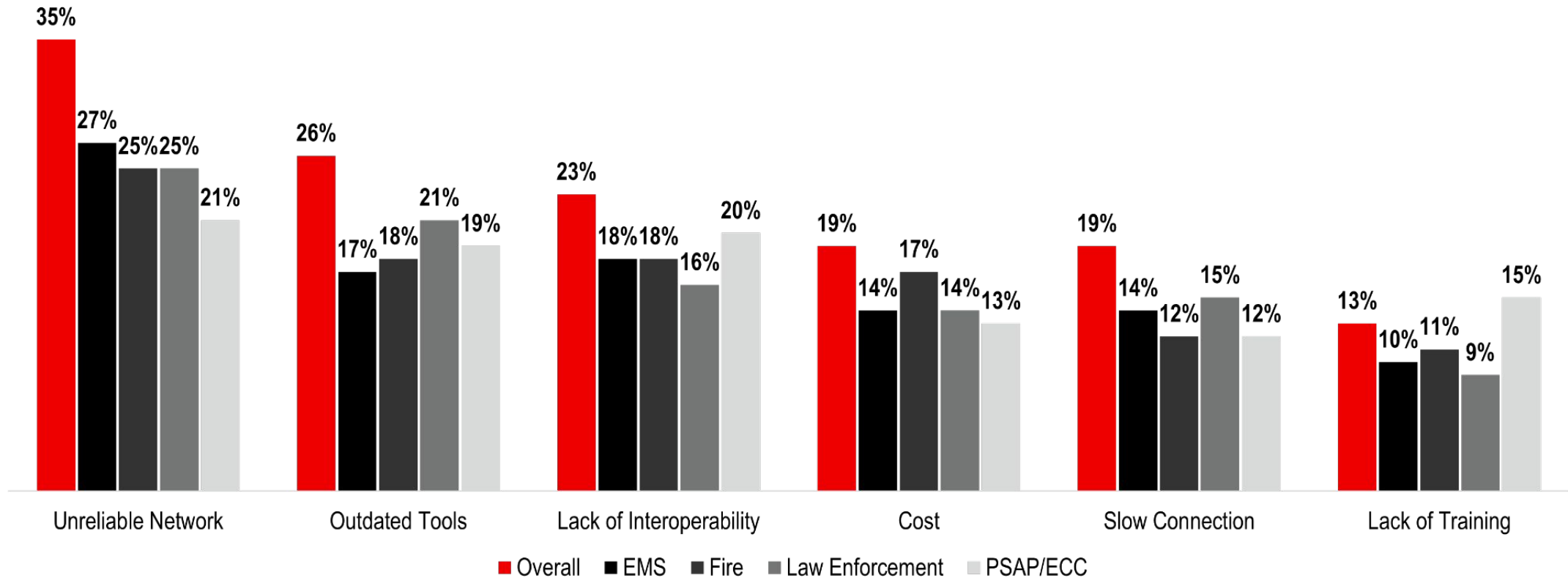
TECH ON THE JOB

Based on survey results, first responders believe network reliability and resiliency are very important. This is particularly true for PSAP/ECC and law enforcement.

How important do you think network reliability, resiliency and redundancy are in public safety?

	Very important	Somewhat important	Neither important or unimportant	Somewhat unimportant	Not important
Overall	91%	8%	1%		
EMS	91%	8%	1%		
Fire	88%	10%	1%		
Law Enforcement	93%	6%	1%		
PSAP/ECC	93%	4%	3%		
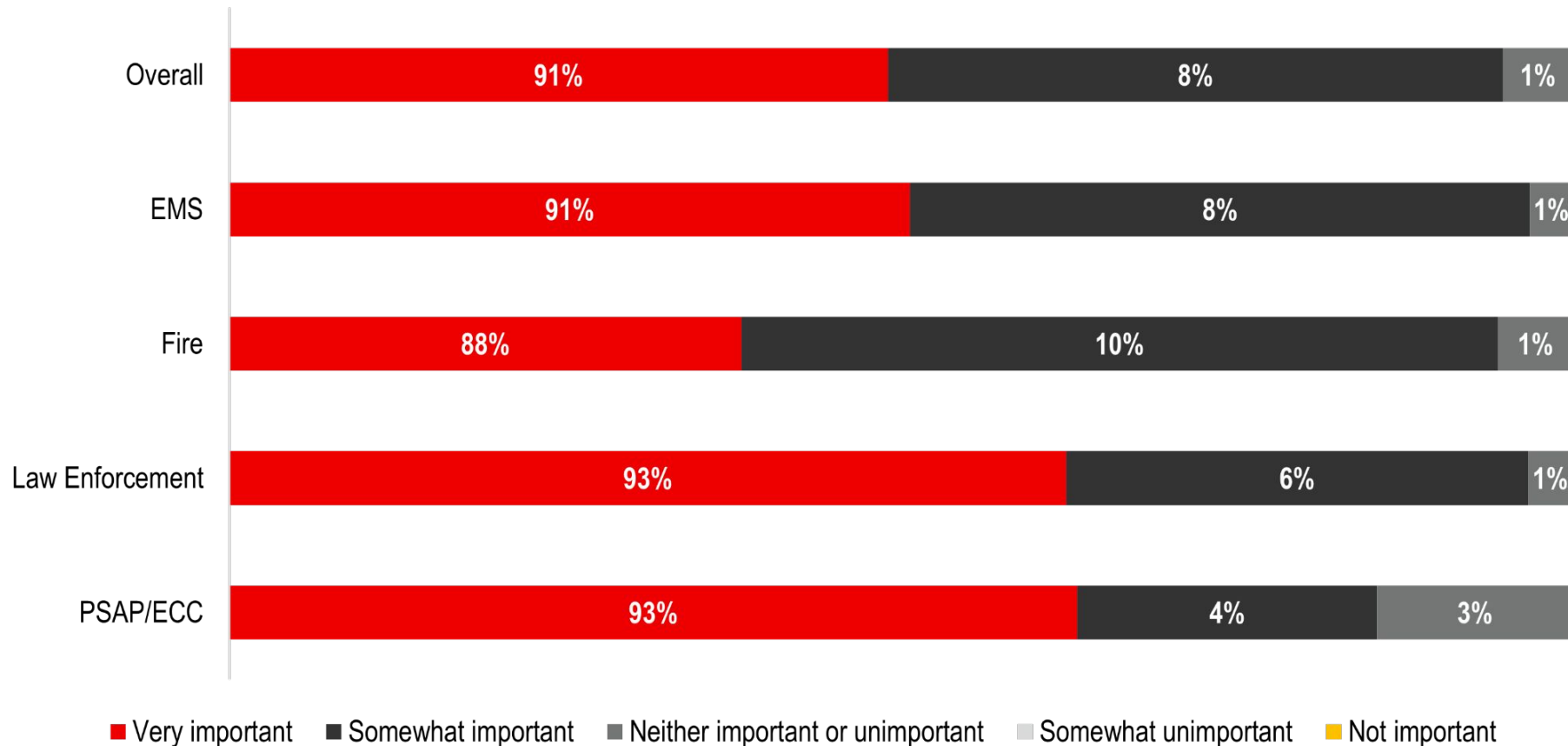
Readiness and Crisis Response

READINESS & CRISIS RESPONSE

Based on survey results, a reliable and resilient network is the most important consideration during emergencies.

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

Factor	Percentage
A reliable and resilient communications network	81%
Interoperability	47%
Durable/rugged devices	46%
Ability to send location information	30%
Calls and texts between the team	27%
Fast internet speed to share photos, video and data	27%
Enhanced situational awareness	20%
Mobile communication-enabling assets	17%

■ Important factor
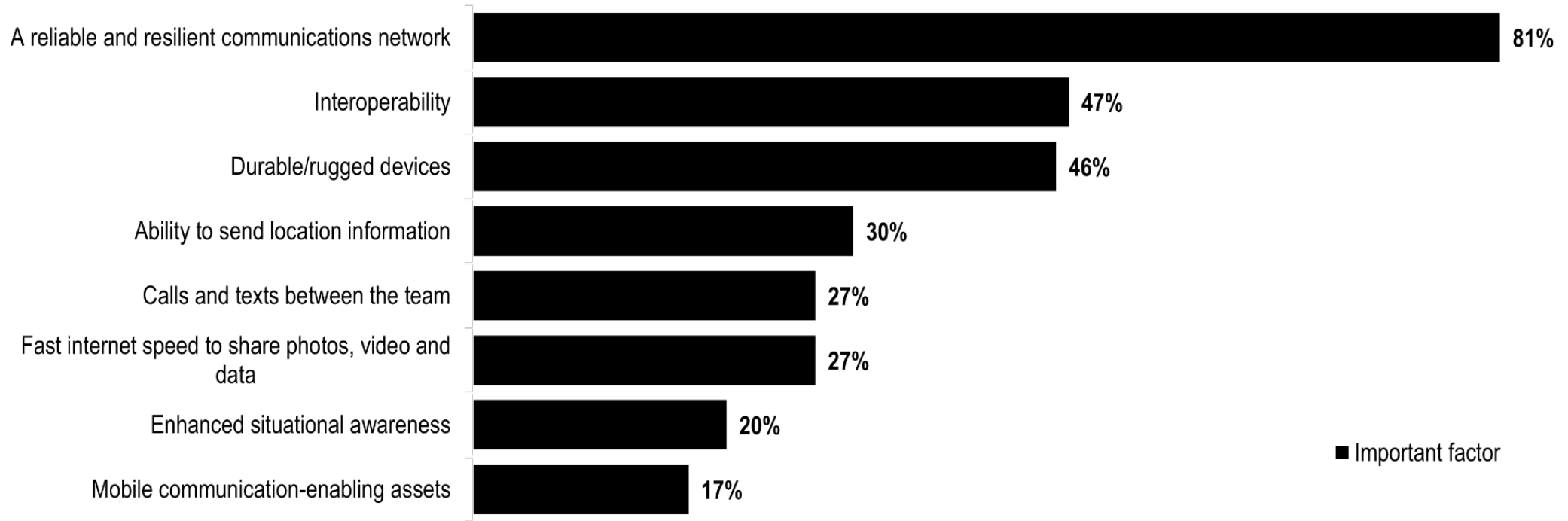
READINESS & CRISIS RESPONSE

The survey results show that most first responders believe their agency is prepared technology-wise to immediately respond to a natural disaster or crisis. Law enforcement feels the most prepared, while EMS, fire and PSAP/ECC responded less confidently.

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?

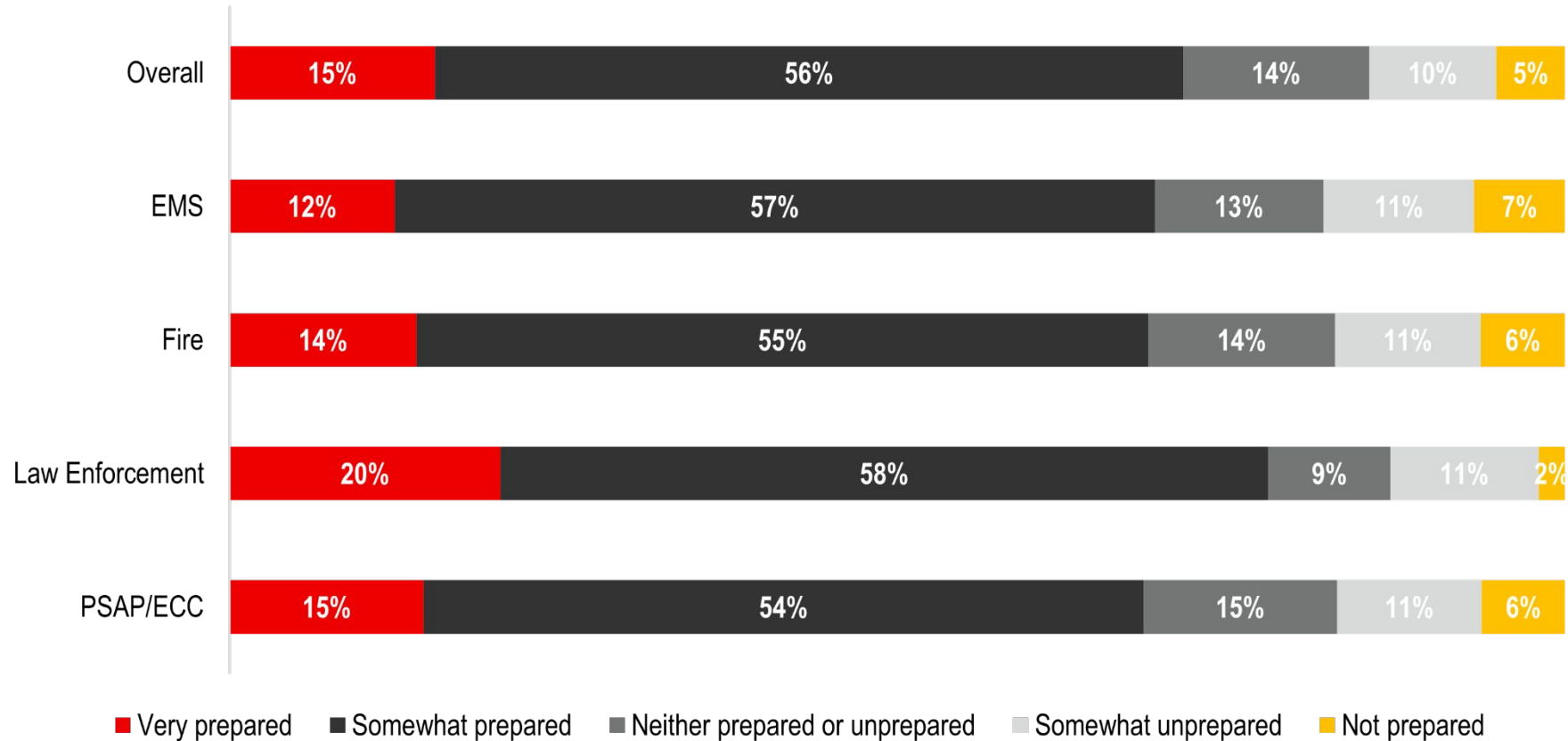|	Very prepared	Somewhat prepared	Neither prepared or unprepared	Somewhat unprepared	Not prepared
Overall	9%	37%	19%	16%	19%
EMS	9%	36%	18%	17%	20%
Fire	8%	34%	20%	18%	20%
Law Enforcement	10%	40%	16%	16%	17%
PSAP/ECC	17%	39%	20%	16%	9%
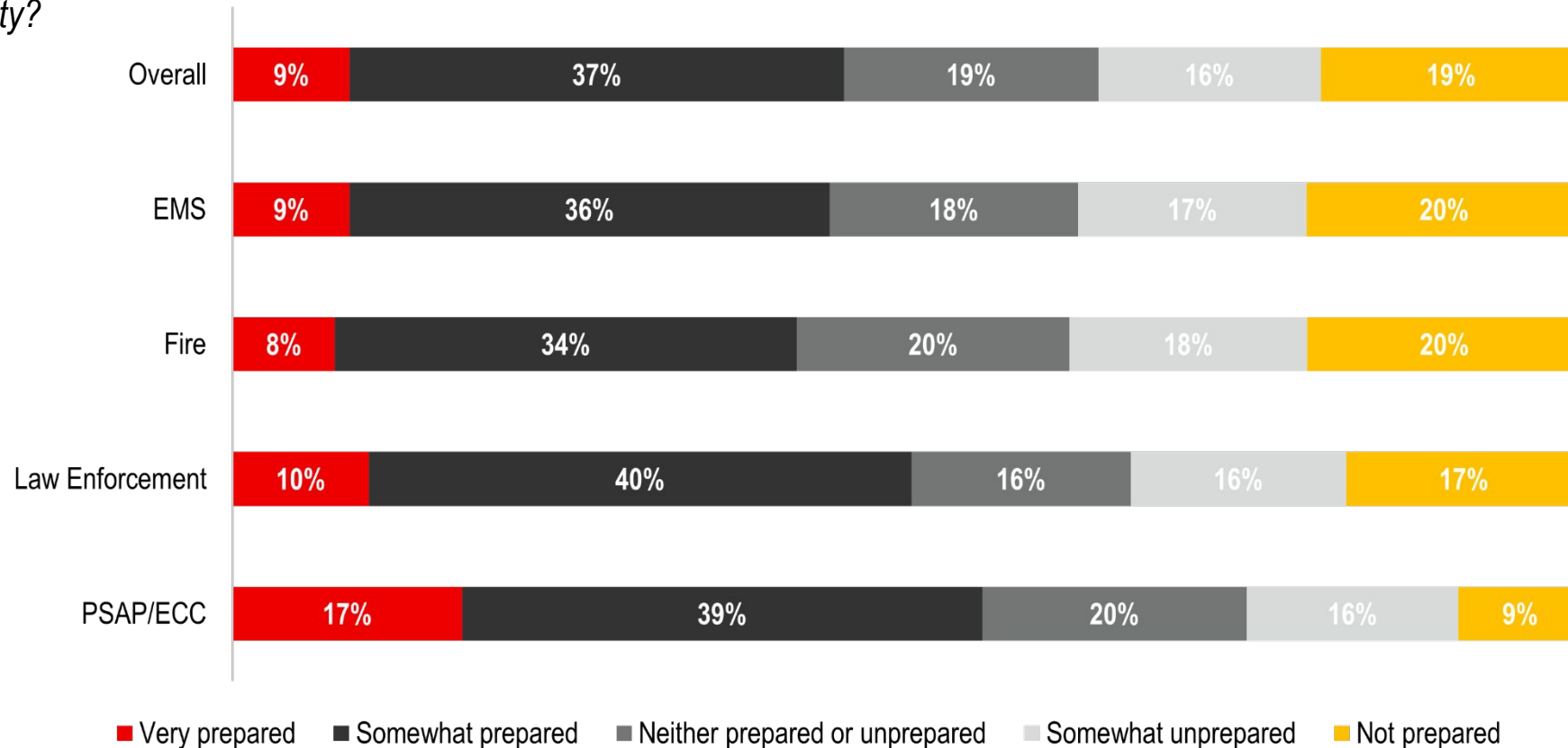
READINESS & CRISIS RESPONSE

Across agencies, fewer than 50% of respondents believe their agency is at least somewhat prepared in case of a cyberattack. PSAP/ECC respondents feel the most prepared, while EMS and Fire feel less prepared than others.

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

Agency	Very prepared	Somewhat prepared	Neither prepared or unprepared	Somewhat unprepared	Not prepared
Overall	15%	56%	14%	10%	5%
EMS	12%	57%	13%	11%	7%
Fire	14%	55%	14%	11%	6%
Law Enforcement	20%	58%	9%	11%	2%
PSAP/ECC	15%	54%	15%	11%	6%

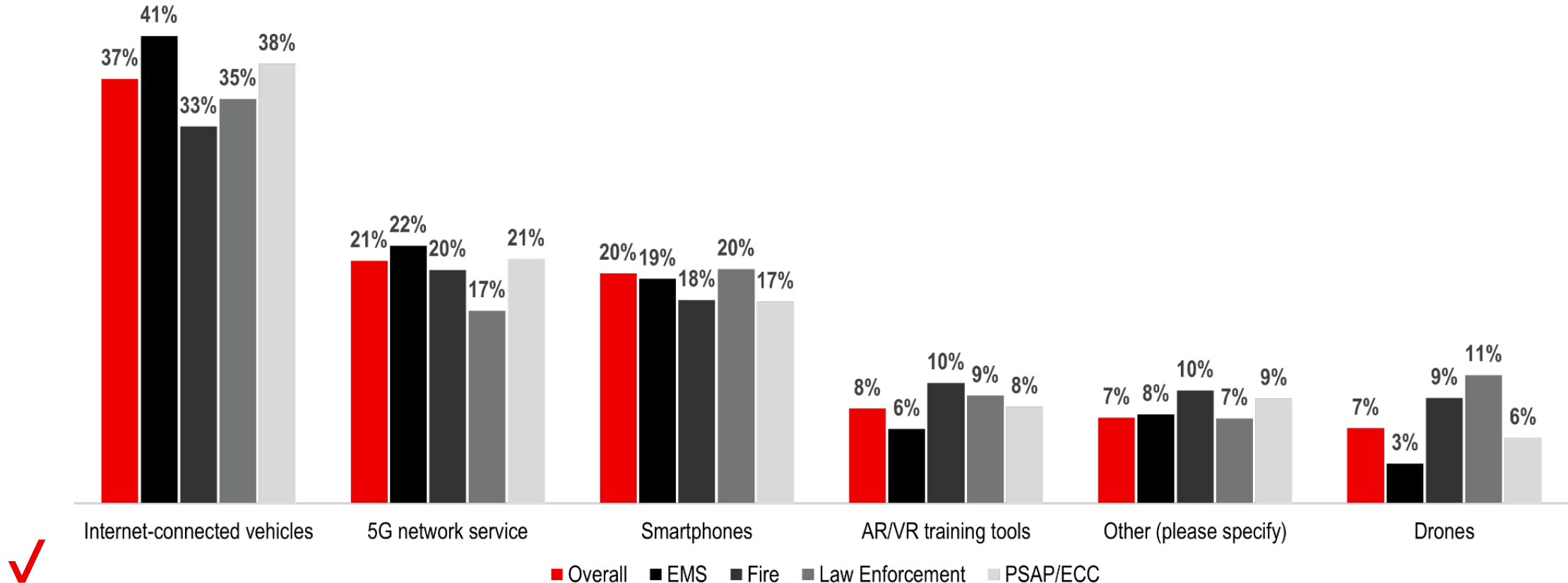■ Very prepared ■ Somewhat prepared ■ Neither prepared or unprepared ■ Somewhat unprepared ■ Not prepared

Looking Ahead

LOOKING AHEAD

The survey results show that internet-connected vehicles are a top priority for public safety agencies, particularly for EMS and PSAP/ECC first responders. Fire departments had the most diverse priorities, with more firefighters selecting AR/VR training as a priority and less selecting smartphones and internet-connected vehicles than other first responder groups.

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

Bar chart legend: ■ Overall ■ EMS ■ Fire ■ Law Enforcement ■ PSAP/ECC

	Overall	EMS	Fire	Law Enforcement	PSAP/ECC
Internet-connected vehicles	37%	41%	33%	35%	38%
5G network service	21%	22%	20%	17%	21%
Smartphones	20%	19%	18%	20%	17%
AR/VR training tools	8%	6%	10%	9%	8%
Other (please specify)	7%	8%	10%	7%	9%
Drones	7%	3%	9%	11%	6%

LOOKING AHEAD

A stronger connection in the field is the number one feature first responders said they would like to get with their current communications technology, with the ability to share location information and quickly upload/download in the field also desired.

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

Stronger connection in the field
- 57%
- 30%
- 38%
- 35%
- 35%

Ability to share location information with team members in field
- 42%
- 17%
- 21%
- 20%
- 21%

Quicker uploads and downloads in the field
- 39%
- 15%
- 19%
- 22%
- 18%

Ability to quickly share images, videos, audio and other files from the field
- 37%
- 15%
- 19%
- 20%
- 22%

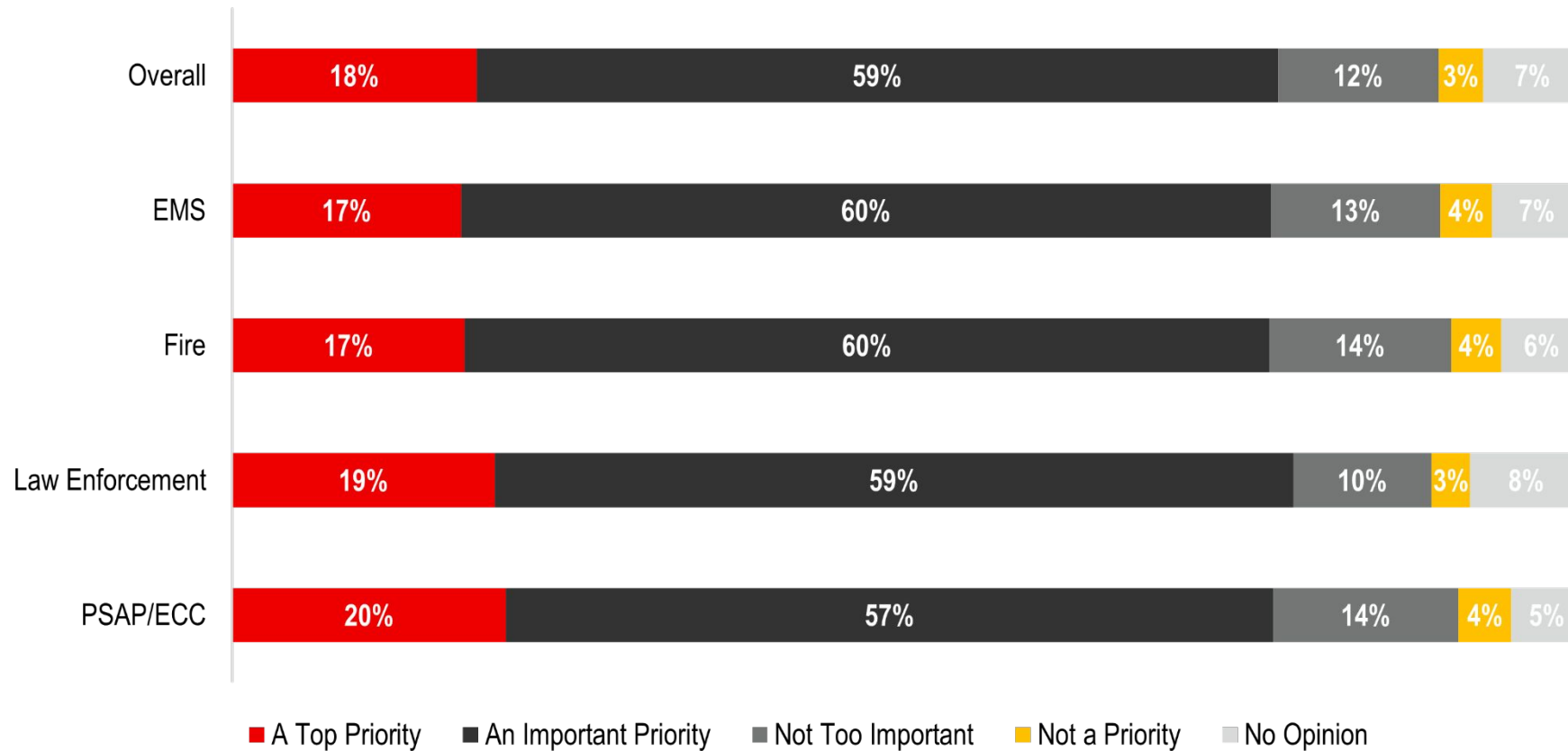Overall ■ EMS ■ Fire ■ Law Enforcement ■ PSAP/ECC
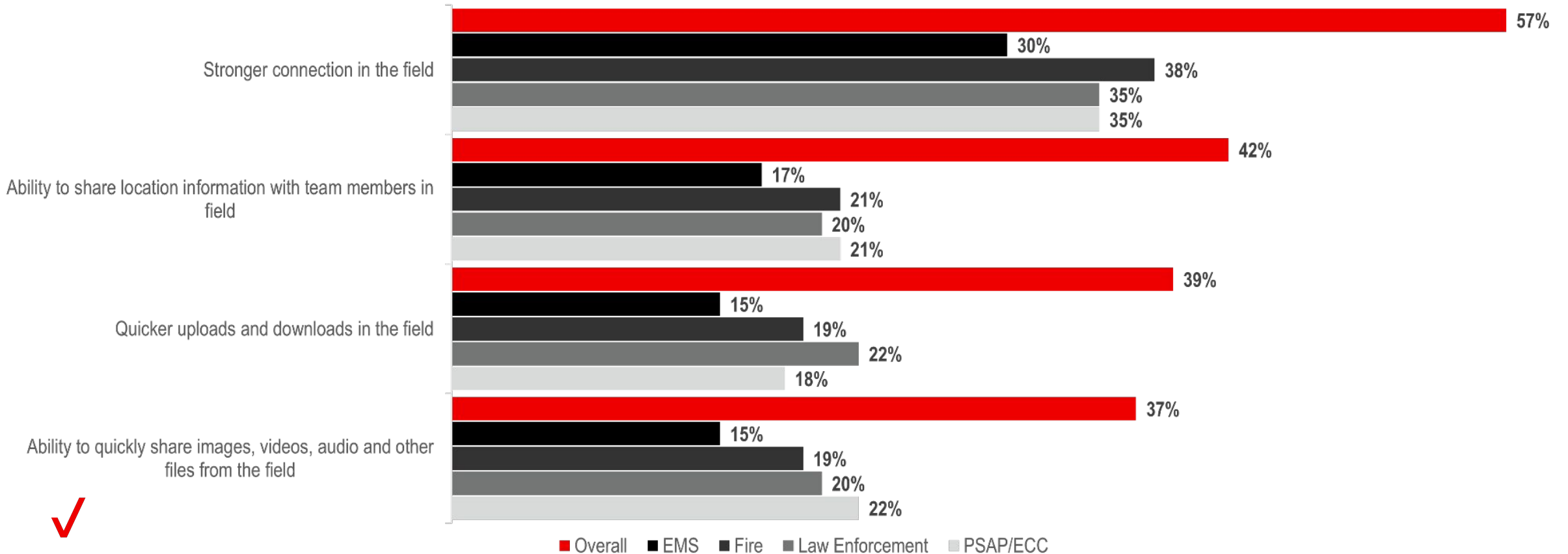
The Rise of 5G

THE RISE OF 5G

Based on survey results, first responders share similar opinions about the importance of 5G to the future of public safety, with the overwhelming majority recognizing it as a priority.

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

Legend: A Top Priority | An Important Priority | Not Too Important | Not a Priority | No Opinion

Category	A Top Priority	An Important Priority	Not Too Important	Not a Priority	No Opinion
Overall	18%	59%	12%	3%	7%
EMS	17%	60%	13%	4%	7%
Fire	17%	60%	14%	4%	6%
Law Enforcement	19%	59%	10%	3%	8%
PSAP/ECC	20%	57%	14%	4%	5%

THE RISE OF 5G

Reliability and speed are the top benefits first responders across agencies believe 5G will offer.

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

Reliability
- Overall: 42%
- EMS: 43%
- Fire: 41%
- Law Enforcement: 39%
- PSAP/ECC: 39%

Speed
- Overall: 34%
- EMS: 33%
- Fire: 33%
- Law Enforcement: 35%
- PSAP/ECC: 30%

More effective use of data
- Overall: 12%
- EMS: 13%
- Fire: 15%
- Law Enforcement: 12%
- PSAP/ECC: 16%

Enhanced situational awareness
- Overall: 12%
- EMS: 11%
- Fire: 11%
- Law Enforcement: 14%
- PSAP/ECC: 15%

Legend: ■ Overall ■ EMS ■ Fire ■ Law Enforcement ■ PSAP/ECC