STATE OF THE INDUSTRY

2021 BUDGET YEAR PROJECTION

Through the use of an in-depth survey, Officer Media Group / Officer.com received information from police departments, of all sizes, nationwide and used the information to generate a projection of what the industry supporting law enforcement will experience in the 2021 budget year.

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INTRODUCTION

It is the intention of Officer Media Group, through the publication of this report, to offer information to both the law enforcement (LE) community and the industry that supports it.

As law enforcement executive officers prepare their budget requests each year, it's our intention that this document be viable to support the stated needs. Many LE executives have had to depend on information as much as three to five years old when attempting to justify increases in staffing, equipment, training and more. By publishing the results of our annual survey, which reveals the needs and expectations of contemporary LE executives, other LE executives can leverage the information, properly cited to support their stated budget needs.

For the industry that supports the LE community, the anticipated increases or decreases in expenditures are reported. Where agencies anticipate budget growth, HOW the LE executives will direct the increase in funding is revealed. Where agencies anticipate budget reductions, how the LE executives anticipate absorbing such losses is also revealed.

Any questions or clarifications can be directed to our editorial staff via email to editor@officer.com or by calling 800-547-7377 and asking for a member of the law enforcement editorial staff.

INTENDED PURPOSE

Knowing that law enforcement executives all across the nation have to justify budget requests year after year, and that they do so largely based on information from previous years, Officer Media Group recognized the need for an industry survey that *projected* need instead of guessed at it. This report provides you the results from our comprehensive survey conducted June - August, 2020..

CONTENTS

SECTION ONE: SURVEY SAMPLING INFORMATION

Percentages reported are typically rounded off to the nearest whole number.

The Officer Media Group State of the Industry survey was sent out to approximately 50,000 email subscribers from our opt-in only qualified email list. Information was gathered on the respondent's rank, assignment, agency size, agency demographics and anticipated changes to the agency's budget in the 2021 budget year.

Respondent Rank

Of the responses, 43% were of command rank (Lieutenant or higher).

Of the responses, 26% were of first line supervisor rank (Corporal to First Sergeant).

Of the responses, 30% were of line officer rank (Patrol officer or Officer First Class).

It is imperative that the 30% of respondents that are line officer rank aren't dismissed as inaccurate or lacking in value. If an agency has limited staffing, executive and administrative duties often are delegated to line rank officers. See statistics on the sizes of agencies represented to correlate the responses to agency staffing and keep this number in perspective.

Respondent Duty Assignment

Of the responses, 30% identified themselves as Executive/Command officers.

Of the responses, 36% identified themselves as assigned to Patrol.

Of the responses, 5.7% identified themselves as "Other" and then qualified that selection. The majority of those who selected "other" identified themselves as holding multiple positions of responsibility, one of which was executive or command.

The remaining 28.3% of respondents identified themselves in a variety of assignments that included Communications, Investigations, Training, Special Operations and Community Relations.

Respondent Supervisory Status

Of the responses, 26% identified themselves as a Commander.

Of the responses, 32% identified themselves as a Supervisor.

Of the responses, 9.5% identified themselves as a Manager.

Of the responses, 23% identified themselves as a Line Officer.

Rank / Assignment / Status Observation

In reviewing the responses there may appear to be a conflict in the numbers as 30% responded that their RANK was line officer level, but 23% of the Supervisory Status were reported as Line Officer. In smaller agencies it is entirely possible that a Corporal or Sergeant could be a line officer. "Line officer" can be an officer who, although holding supervisory rank, ALSO performs line officer duties.

In reviewing the responses over half of the respondents identified themselves either in Patrol or in a special duty assignment of some type. Each of those assignments and certainly any Patrol division have command level officers. It is a false assumption to believe that all those assigned to patrol are line officers.

Type of Agency

The largest single segment of Agency Type responding was Municipal at 68% of the participants.

State agencies were the next largest represented at 13%.

County agencies were third largest at 11%.

Campus police agencies were represented by 4% of the responses.

Federal agencies were represented by 2% of the responses.

The remaining 2% of the responses were a combination of Transit, Private, Health/Hospital, Tribal and other agency types.

Size of Population Served

19% of the respondents serve a population smaller than 5,000

15% of the respondents serve a population between 5,001 – 10,000

9% of the respondents serve a population between 10,001 – 25,000

19% of the respondents serve a population between 25,001 – 50,000

15% of the respondents serve a population between 50,001 – 100,000

8% of the respondents serve a population between 100,001 – 250,000

2% of the respondents serve a population between 250,001 – 500,000

0% of the respondents serve a population between 500,001 – 1,000,000

13% of the respondents serve a population over 1,000,000

A combined 62% of population size served is under 50,000.

Dedicated Services

Respondents were asked to indicate what services their agency had dedicated officers for. Answers to this question with dedicated services ranked as follows (patrol was not listed as an option and was assumed at 100% for the purposes of this survey):

Investigations	94.3%
Community Relations	62.3%
School Resource Officers	47.2%
Special Operations	43.4%
Evidence Collection / Forensics officers	43.4%
Special Programs (GREAT, DATE, etc)	35.9%
Bicycle Patrol	30.2%
Foot Patrol	20.8%
Motorcycle Patrol	30.2%
Cyber Crimes	17%

Agency Sworn Strength

As you review these numbers and percentages, be aware that this is an indicator of average agency size in the United States. We had multiple respondents from a couple of agencies. The responses indicate that 66% of respondent agencies are authorized 100 officers or less with ***53% being under 50 sworn officers***. About 1/6th of responding agencies are between 11-25 sworn officers.

< 10 sworn officers: 11.3%

11-25 sworn officers: 15.1%

26-50 sworn officers: 26.4%

51-100 sworn officers: 13.2%

101-250 sworn officers: 13.2%

251-500 sworn officers: 3.8%

501-1,000 sworn officers: 1.9%

1,001-5,000 sworn officers: 9.4%

Over 5,000 sworn officers: 5.7%

General Demographics of Sworn Officers

**These percentages reflect the AVERAGE answer of the respondents.*

AGE:

25 and under:	12%
26 – 30:	18%
31 – 35:	18%
36 – 40:	18%
41 – 45:	15%
45 – 50:	13%
Over 50:	6%

GENDER:

MALE:	84%
FEMALE:	16%

RACE:

Caucasian:	81.3%
African-American:	7.3%
Hispanic:	8%
Asian:	1.3%
Other:	1.7%

Identified Largest Areas of Concern:

What agencies need to prepare for obviously has an impact on the services and equipment they purchase or budget for. As part of our survey, we asked the respondents to identify the top three concerns they were carrying into the next three to five budget cycles. Respondents could pick up to three of the listed nine options. Listed in order of greatest concern to least concern, they are:

Protest / Riot event:	73.5%
Active Shooter event in an educational setting:	58.5%
Resurgence of COVID-19 requiring LE Services	54.7%
Natural Disaster / weather emergency events:	49.1%
Active Shooter event in a commercial setting:	43.4%
Terrorist Attack:	7.6%
Other type event:	11.3%

Most common “Other” type of event specified was ambush-style attacks on officers.

SECTION TWO: BUDGET GROWTH +/- ANTICIPATION

34% of the respondents indicated that they anticipate an increase to their budget in the 2021 fiscal year.*

The remaining 66% indicated that they anticipate no reduction or other change in their budget for the 2021 fiscal year over the current year.

**It is a statement about the on-going state of the industry and possibly about our nation's economy as a whole that one in three agency's responding anticipate an increase in their 2021 budget.*

Allocation of Anticipated Budget Increases

Respondents were asked to "check all that apply" when asked how they intended to spend any received budget increases. The answers were as follows, shown in overall percentages for the given options.

Fleet*	38%
Other Equipment*	34%
Salary	30%
Training	23%
Community Outreach	21%
Less-Lethal Tools*	13%
Uniforms	9%
Firearms*	4%

**See follow-on information for further information regarding anticipated increases and/or cut-backs for handguns, rifles, shotguns, sedans, SUVs, ECWs and Body-Cams.*

Allocation of Anticipated Budget Decreases

Respondents were asked to “check all that apply” when asked how they intended to spread out any mandated budget decreases. The answers were as follows, shown in overall percentages for the given options.

Other Equipment*	53%
Fleet*	42%
Training	34%
Salary	21%
Community Outreach	17%
Firearms*	15%
Less-Lethal Tools*	15%
Uniforms	9%

**See follow-on information for further information regarding anticipated increases and/or cut-backs for handguns, rifles, shotguns, sedans, SUVs, ECWs and Body-Cams.*

Anticipated Sworn Strength Adjustments

Of the respondents, 28% expect a change to their authorized strength. Of that 28% who anticipate change, 64% anticipate an increase in strength.

54.7% expect an increase in total sworn strength of 5% or less

5.66% expect an increase in total sworn strength of between 6 – 10%

3.77% expect an increase in total sworn strength of between 11 - 25%

19.9% expect a decrease in total sworn strength of 5% or less

9.4% expect a decrease in total sworn strength of between 6 – 10%

7.6% expect a decrease in total sworn strength of between 11 – 25%

Agency Support Staff Outlook

Of the respondents, 15% anticipate a change to the number of their support staff. Of those anticipating any change:

62.3% anticipate increasing their support staff

37.7% anticipate decreasing their support staff

The most common adjustment anticipated by far, increase OR decrease, is 5% or less of current staff strength.

Patrol Equipment Information

AUTHORIZED/ISSUED HANDGUN

Respondents were asked to indicate what the approved or issued handgun was for their agency and could check all that applied. The received responses were:

Beretta:	11.3%	Colt:	7.6%
Glock:	77.4%	Ruger:	7.6%
Sig Sauer / SigArms:	18.9%	Smith & Wesson:	28.3%
Taurus:	1.9%	Walther:	3.8%
FNH:	5.7%	H&K:	3.8%
Springfield Armory:	7.6%		

DOMINANT HANDGUN CALIBERS

Respondents were asked to indicate what caliber their issued or authorized handgun is. The received responses were:

.38 Special:	3.8%	.357 Magnum:	5.7%
.357Sig:	0%	9mm:	68%
.40S&W:	35.9%	10mm:	1.9%
.45ACP:	30.2%	.45GAP:	1.9%

**9mm, .40S&W and .45ACP have been mainstays of the LE market for decades. There is no reason to expect a major change in this trend.*

ANTICIPATED HANDGUN CHANGES

When asked if they anticipated any changes to their issued / authorized handgun(s) in the 2021 budget year:

Yes:	3.8%
No:	96.2%

PATROL RIFLES

Of the respondents, 85% indicated that their agency issues or authorizes patrol rifles.

Of the respondents, 15% indicated that their agency DOES NOT issue or authorize patrol rifles.

When asked if they anticipated any additions to their patrol rifle programs in the coming 2021 budget year 5.7% replied yes.

When asked if they anticipated any cuts or decreases in their patrol rifle program in the coming 2021 budget year 94.3% said no.

SHOTGUNS

Of the respondents, 83% indicated that their agency issues or authorizes shotguns.

Of the respondents, 17% indicated that their agency DOES NOT issue or authorize shotguns.

As shotguns have been part of law enforcement equipment for decades, no question was asked about increases or decreases in agency shotgun inventory. While some agencies moved away from issued/authorized shotguns as they embraced patrol rifles, many agencies – indicated in the 83% immediately above - continued to maintain a shotgun program and either issue or authorize the weapons.

ELECTRONIC CONTROL WEAPONS

Of the respondents, 90.6% indicated that their agency issues Electronic Control Weapons (ECWs) which would include TASER, PhaZZer, etc.

Of the respondents, 15.1% indicated an anticipated increase in their ECW inventory and program in the 2021 budget year.

OTHER LESS LETHAL TOOLS

Of the respondents, 89% indicated that their agency issues an OC / Chemical weapon product to their officers.

Of the respondents, 84.9% indicated that their agency issues a collapsible or fixed baton to their officers.

Of the respondents, 35.9% indicated that their agency issues another less lethal tool (or tools) to patrol officers, but did not specify what type, manufacturer, etc.

BODY CAMERAS

Respondents were asked what percentage of their patrol officers were currently equipped with Body Cameras:

Less than 25%:	51%
25-50%:	1.9%
51-75%:	7.6%
76-100%:	39.6%

**Over half of the agencies who reported having body cameras in use also report having 100% of their patrol officers equipped.*

Those respondents who indicated having a body camera program but NOT having 100% of their officers equipped were asked if they planned on increase their body camera inventory and use in the 2021 budget year. 30.2% indicated a planned increase.

Those respondents who indicated a planned increase in their body camera program were asked to indicate how much of an increase as a percentage over their current program.

Increase 5% or less:	73.6%
Estimated 10% increase:	13.2%
Estimated 15% increase:	0%
Estimated 20% increase:	3.8%
Estimated 25% increase:	0%
Estimated 50% increase:	3.8%
Estimated 75% increase:	1.9%
Estimated 76% increase or more:	3.8%

Fleet Information

AVERAGE FLEET SIZE

Respondents were asked how many patrol vehicles their agency had. Based on the responses, it was determined that the AVERAGE agency fleet size equals one patrol vehicle for every five sworn officers.

While many agencies have a "personal car" program and have a one-to-one ratio of patrol vehicle to sworn officers, most larger agencies have "pool" cars which are run every shift by different officers. Additionally, some agencies run two-officer cars, so the combination of such circumstances resulted in the ***one patrol vehicle per every five sworn officers national average*** based on responses.

AVERAGE FLEET COMPOSITION

Based on the responses, the average fleet is comprised of 60% sedans, 36% SUVs, and 4% "other" vehicles. The "other" category would include pick-up trucks, vans, motorcycles, etc.

Based on the responses, the average fleet is comprised of 85% marked vehicles and 15% unmarked units.

ANTICIPATED FLEET CHANGES IN THE 2021 BUDGET YEAR

When asked if their agency anticipated adding or replacing patrol vehicles in the 2021 budget year, 71.7% of the respondents indicated YES.

When asked if their agency anticipated removing any patrol vehicles from service WITHOUT REPLACEMENT in the 2021 budget year, 13.2% of the respondents indicated YES.

COMMON RESCUE/SERVICE EQUIPMENT IN PATROL VEHICLES

When asked to indicate what common patrol, rescue or service equipment was in each patrol vehicle, the responses were as indicated:

First Aid Kit:	94.3%
Trauma Kit (included tourniquet & hemostatic agent):	77.4%
Automatic Electronic Defibrillators (AEDs):	50.9%
Fire Extinguisher:	88.8%
Breaching / Rescue Tools (pry bar, etc):	41.5%