STATE OF THE INDUSTRY

2023 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 2023 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.

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 August through September, 2022.

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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 45,000 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 2023 budget year. Over 450 officers responded to this year's survey.

Respondent Rank

Of the responses, 51% were of command rank (Lieutenant or higher).

Of the responses, 22% were of first line supervisor rank (Corporal to First Sergeant).

Of the responses, 20% were of line officer rank (Patrol officer or Officer First Class).

Of the responses, 8% didn't identify their rank.

It is imperative that the 20% 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, 44% identified themselves as Executive/Command officers.

Of the responses, 29% identified themselves as assigned to Patrol.

Of the responses, 5.3% 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 21.7% 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, 42% identified themselves as a Commander.

Of the responses, 27% identified themselves as a Supervisor.

Of the responses, 8.7% identified themselves as a Manager.

Of the responses, 21.9% identified themselves as a Line Officer.

Rank / Assignment / Status Observation

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 56.9% of the participants.

State agencies were represented at 6.6%.

County agencies were at 24%.

Campus police agencies were represented by 6% of the responses.

Federal agencies were represented by 3% of the responses.

The remaining 3.5% of the responses were a combination of Transit, Private, Health/Hospital, Tribal and other agency types.

Size of Population Served

16.4% of the respondents serve a population smaller than 5,000

11.3% of the respondents serve a population between 5,001 – 10,000

14.8% of the respondents serve a population between 10,001 – 25,000

13.8% of the respondents serve a population between 25,001 – 50,000

12% of the respondents serve a population between 50,001 – 100,000

8.7% of the respondents serve a population between 100,001 – 250,000

6.7% of the respondents serve a population between 250,001 – 500,000

5.8% of the respondents serve a population between 500,001 – 1,000,000

7.8% of the respondents serve a population over 1,000,000

A combined 59.2% 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	88.2%
Community Relations	59.5%
Special Operations	56.3%
School Resource Officers	53.2%
Evidence Collection / Forensics officers	50.4%
Bicycle Patrol	32.2%
Special Programs (GREAT, DATE, etc)	31%
Foot Patrol	29.4%
Motorcycle Patrol	25.9%
Cyber Crimes	25.7%

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 <u>64.8% of respondent agencies are authorized 100 officers or less</u> with ***51.4% being under 50 sworn officers***. Over one-third, 35.4%, of the responding agencies represented have 25 or less sworn officers.

< 10 sworn officers: 15.1%

11-25 sworn officers: 20.4%

26-50 sworn officers: 17.1%

51-100 sworn officers: 15.3%

101-250 sworn officers: 12.6%

251-500 sworn officers: 6.4%

501-1,000 sworn officers: 4.9%

1,001-2,500 sworn officers: 3.3%

2,501-5,000 sworn officers: 2.2%

5,001-10,000 sworn officers: 1.3%

10,001-25,000 sworn officers: .7%

Over 25,000 sworn officers: .7%

General Demographics of Sworn Officers

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

AGE:

The largest bulk of officers today are between 25-45 years old. The percentage of officers under 25 is lower than it was in last year's survey. Anecdotal information shows that the reduced percentage under 25 is due to recruiting and retention challenges with those in that age group. In previous surveys, the percentages under 25 and between 45-50 were fairly similar. New information shows that officers over 45 are a growing percentage of overall strength.

GENDER:

MALE: Male officers continue to make up the largest percentage of sworn strength with 87% of responding agencies reporting that males make up 61% or more of it.

FEMALE: In 13% of the responding agencies, females comprise 13% or less of the sworn strength.

Transgender or refused to identify: This is the first year we've included this category in our projection survey. 94% of responding agencies indicated that this category makes up less than 1% of their sworn strength.

RACE:

Caucasian:	74%
African-American:	14%
Hispanic:	9%
Asian:	1.4%
Other:	1.6%

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:

Active Shooter / Active Killer events:	85.9%
Riots / Civil Disorder events:	43.4%
Medical health outbreak events:	22.4%
Increased attacks on officers:	74.7%
Natural Disaster / weather emergency events:	54.6%
Terrorist Attack:	10.7%
Other type event:	7.6%

Most common “Other” type of event specified was drug related – either increase in sales and overdoses or accidental exposure to officers.

SECTION TWO: BUDGET GROWTH +/- ANTICIPATION

68.8% of the respondents indicated that they anticipate an increase to their budget in the 2023 fiscal year.*

17.2% indicated that they anticipate no reduction in their budget for the 2023 fiscal year over the current year.

14% indicated that they anticipate reduction in their budget for the 2023 fiscal year as compared to 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 seven out of ten agency's responding anticipate an increase in their 2023 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*	53.4%
Other Equipment*	36.8%
Salary**	74%
Training	51.1%
Community Outreach	26.2%
Less-Lethal Tools*	23.3%
Uniforms	24.3%
Firearms*	22.2%

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

***74% of agencies planning to use increased budget for salaries is a strong indicator of the on-going challenge for recruiting and retention in the law enforcement field.*

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*	46.5%
Fleet*	29%
Training	31.3%
Less-Lethal Tools*	13.8%
Uniforms	12.4%
Salary	11.5%
Community Outreach	21.2%
Firearms*	12.9%

**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, 55% expect a change to their authorized strength. Of that 55% who anticipate change, 43.7% anticipate an increase in strength.

23.8% expect an increase in total sworn strength of 5% or less

13.6% expect an increase in total sworn strength of between 6 – 10%

4.7% expect an increase in total sworn strength of between 11 - 25%

1.3% expect an increase in total sworn strength of between 25 – 50%

2.9% expect a decrease in total sworn strength of 5% or less

4.5% expect a decrease in total sworn strength of between 6 – 10%

3.3% expect a decrease in total sworn strength of between 11 – 25%

.9% expect a decrease in total sworn strength of between 25-50%

Agency Support Staff Outlook

Of the respondents, 27.5% anticipate a change to the number of their support staff. Of those anticipating any change:

19.4% anticipate increasing their support staff

8% anticipate decreasing their support staff

The most common adjustment anticipated by far, increase OR decrease, is 10% 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:	5.1%	Colt:	5.3%
Glock:	79.6%	Ruger:	4.2%
Sig Sauer / SigArms:	21.1%	Smith & Wesson:	16.2%
Taurus:	1.1%	Walther:	0.9%
FNH:	2.7%	H&K:	5.8%
Springfield Armory:	6%	Other:	5.1%

DOMINANT HANDGUN CALIBERS

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

.38 Special:	2.2%	.357 Magnum:	2.2%
.357Sig:	3.8%	9mm:	72.4%
.40S&W:	33.6%	10mm:	2%
.45ACP:	19%	.45GAP:	2.2%

**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 2023 budget year:

Yes:	13.1%	No:	86.9%

3.3% indicate switching to Glock.
1.8% indicate switching to SigArms.
All other changes were under .5%.
11.5% indicated a plan to switch to 9mm from current caliber.

PATROL RIFLES

Of the respondents, 89.7% indicated that their agency issues or authorizes patrol rifles.

Of the respondents, 10.3% 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 2023 budget year 12% replied yes.

When asked if they anticipated any cuts or decreases in their patrol rifle program in the coming 2023 budget year 94.7% said no.

SHOTGUNS

Of the respondents, 70.3% indicated that their agency issues or authorizes shotguns.

Of the respondents, 29.7% 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 70.3% immediately above - continued to maintain a shotgun program and either issue or authorize the weapons.

ELECTRONIC CONTROL WEAPONS

Of the respondents, 87.6% indicated that their agency issues Electronic Control Weapons (ECWs) which would include TASER, PhaZZer, etc.

Of the respondents, 23.1% indicated an anticipated increase in their ECW inventory and program in the 2023 budget year.

OTHER LESS LETHAL TOOLS

Of the respondents, 84.3% indicated that their agency issues an OC / Chemical weapon product to their officers.

Of the respondents, 72.1% indicated that their agency issues a collapsible or fixed baton to their officers.

Of the respondents, 28.1% 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%:	18.7%
25-50%:	2.9%
51-75%:	7.4%
76-100%:	65.8%

**"Less than 25%" is the only answer option that decreased from 2022 to 2023 projections. Every other category increased showing that agencies continue to invest in body worn cameras.*

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 2023 budget year. 19.8% indicated a planned increase.

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 52% sedans, 44% 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 2023 BUDGET YEAR

When asked if their agency anticipated adding or replacing patrol vehicles in the 2023 budget year, 75% of the respondents indicated YES.

When asked if their agency anticipated removing any patrol vehicles from service WITHOUT REPLACEMENT in the 2023 budget year, 15.3% 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:	88%
Trauma Kit (included tourniquet & hemostatic agent):	79.7%
Automatic Electronic Defibrillators (AEDs):	50.9%
Fire Extinguisher:	93.1%
Breaching / Rescue Tools (pry bar, etc):	40.4%