2011 AT&T Business Continuity Study
Dallas/Fort Worth Results

Methodology

The following results are based on an online survey of 100 Information Technology (IT) executives in the Dallas/Fort Worth metropolitan area. The study was conducted by e-Rewards Market Research with companies having total revenues of more than $25 million (except for government entities). Surveys in the Dallas/Fort Worth area were obtained between February 24 and March 1, 2011.

All survey respondents have primary responsibility for business continuity planning, representing 16 major industry areas in addition to local/state government. Two-thirds (65%) represent companies with locations outside of the U.S.

Key Findings

IT Plans for 2011

- **IT budgets for 2011 are about the same or higher than those of the previous two years.** Seven out of ten (73%) executives indicate that their IT budgets for 2011 are the same or higher than the previous two years; 38% indicate the budgets are about the same, and 35% indicate the budgets are higher.

- **Investment in new technologies will continue in 2011.** Eight out of 10 (81%) executives indicate that their companies are investing in new technologies in 2011.

- One-third (35%) of executives indicate that the primary motivation for investing in new technologies is to increase productivity, followed by one-fourth (24%) who indicate new technologies help expand and grow the business.

Business Continuity Plans

- **The vast majority (84%) of Dallas/Fort Worth executives indicate their companies have a business continuity plan.**

- Two-thirds (65%) indicate their companies implement specific protective actions when the federal or state government issues an alert for an impending disaster.

  - A majority (60%) of these companies have had their business continuity plans fully tested in the past 12 months.

  - The vast majority (83%) is concerned about the increasing use of mobile networks and devices and its impact on security threats; 40% are very concerned.

  - Three out of 10 (31%) executives indicate that their company has invoked its business continuity plan. The most frequent reason for invoking the plan was due to extreme weather (15%).

Cloud Computing

- **When asked in what new technologies their company would be investing during 2011, four out of ten (40%) indicated cloud computing would be one of the investments.**

- **Currently, four out of ten (43%) executives indicate cloud computing is a part of their corporate infrastructure.**

    o More than one-fourth (27%) anticipate an increase in investment in cloud computing in 2011.

    o Almost four out of ten (38%) already use or are considering using cloud services to augment their business continuity/disaster recovery strategy.

- **One-fifth (22%) plan to invest in cloud computing in 2011 even though they currently do not include this as part of their corporate infrastructure.**

Social Networking

- **A majority (58%) of these companies provide employees with access to social networking tools.**

    o Most frequently, employees have access to LinkedIn (50%), Facebook (49%), Twitter (42%) and YouTube (38%).

    o Social networking is typically used to proactively share news and content about the business with customers or other stakeholders (29%), directly communicating and engaging with customers or other stakeholders (19%) and for monitoring news and other chatter (15%).

    o Most (80%) executives are concerned about the increasing use of social networking capabilities and its impact on security threats; one-third (34%) are very concerned.

Communicating During Natural Disasters

- **Most (85%) executives indicate that they have special arrangements for communicating with key executives in the event of a natural disaster.**

    o A similar proportion (89%) has e-mail or text messaging capabilities to reach employees outside of work.

    o Eight out of 10 (84%) have systems in place that enable most employees to work from home or remote locations; a majority (51%) has automated calling systems to reach employees by telephone or cell phone outside of work.

Detailed Findings

IT Plans for 2011

- **IT budgets for 2011 are about the same or higher than those of the previous two years.** Seven out of ten (73%) executives indicate that their IT budgets for 2011 are the same or higher than the previous two years; 38% indicate the budgets are about the same, and 35% indicate the budgets are higher. One-fourth (24%) indicate their IT budget for 2011 is lower than in the previous two years.

- **Investment in new technologies will continue in 2011.** Eight out of 10 (81%) executives indicate that their companies are investing in new technologies in 2011.

    o Executives most frequently mention that they will be investing in cloud computing (40%), mobile applications (34%), virtualization (30%), unified communications (23%) and hosted services (20%).

- **Investment in new technologies helps increase productivity and business growth.** One-third (35%) of executives indicate that the primary motivation for investing in new technologies is to increase productivity, followed by one-fourth (24%) who indicate new technologies help expand and grow the business.

Business Continuity Plans

- **Business continuity planning is seen as a "priority" by almost three-fourths (73%) of IT executives in the Dallas/Fort Worth area**. Half (48%) indicate it has always been a priority for their business, and one-fourth (25%) indicate it has become a priority in recent years due to natural disasters, security and terrorist threats.

    o One-fourth (26%) of the executives indicate business continuity is "not a priority."

- **The vast majority (84%) of these executives indicate their companies have a business continuity plan.** Following are specific details about these plans.

    o Two-thirds (65%) indicate their companies implement specific protective actions when the federal or state government issues an alert for an impending disaster.

o A majority (60%) of these companies have had their business continuity plans fully tested in the past 12 months. Only 3% indicate that their plans have never been tested.

o Most (70%) include their wireless network capabilities as part of the business continuity plan.

- A plurality (43%) indicates that employee use of mobile devices plays a major role in the business continuity plan; another one-third (38%) indicate this plays a minor role.

- A majority (70%) indicates that at least 20% of their company's employees use mobile devices that are maintained by the IT department.

- Almost all (88%) indicate that employees are allowed to access work e-mails on their personal Smartphones.

- The vast majority (83%) is concerned about the increasing use of mobile networks and devices and its impact on security threats; 40% are very concerned.

o Three out of 10 (31%) executives indicate that their company has invoked its business continuity plan. Reasons for invoking the plan most frequently involve:

- Extreme weather (15%)
- Power outages at facilities (9%)
- IT failures (4%)

Cloud Computing

- **Four out of ten (43%) executives indicate cloud computing is currently a part of their corporate infrastructure.**

  o Currently, companies most frequently invest in software as a service (17%), infrastructure as a service (12%) and platform as a service (9%).

  o One out of seven (14%) companies indicates they currently spend more than $500,000 annually on cloud computing.

- One out of ten (8%) spends $100,000 to $500,000, and another one out of ten (11%) spends less than $100,000 annually.

  o More than one-fourth (27%) anticipate an increase in investment in cloud computing in 2011.

    - During 2011, one-fifth (22%) plan to invest in software as a service, followed by infrastructure as a service (14%) and platform as a service (13%).

  o Almost four out of ten (38%) already use or are considering using cloud services to augment their business continuity/disaster recovery strategy.

    - One-fifth (22%) are already using cloud services for this purpose, and another 16% are considering doing so.

  o The most likely uses of cloud computing for disaster recovery purposes are data storage (30%), Web servers (26%), application servers (24%) and database (19%).

- **One-fifth (22%) plan to invest in cloud computing in 2011 even though they currently do not include this as part of their corporate infrastructure.**

Social Networking

- **A majority (58%) of these companies provide employees with access to social networking tools.**

  o A plurality (42%) indicates that social networking is generally accepted but used by only a few; three out of ten (29%) indicate that social networking is generally accepted and widely used.

  o Most frequently, employees have access to LinkedIn (50%), Facebook (49%), Twitter (42%) and YouTube (38%).

  o Social networking is typically used to proactively share news and content about the business with customers or other stakeholders (29%), directly communicating and engaging with customers or other stakeholders (19%) and for monitoring news and other chatter (15%).

- One-fifth (22%) are exploring the use of social media but are not yet active, and 15% have no plans for social media activity in the near future.

  o Most (80%) executives are concerned about the increasing use of social networking capabilities and its impact on security threats; one-third (34%) are very concerned.

Communicating During Natural Disasters

- **Most (85%) executives indicate that they have special arrangements for communicating with key executives in the event of a natural disaster.**

  o A similar proportion (89%) has e-mail or text messaging capabilities to reach employees outside of work.

  o Eight out of 10 (84%) have systems in place that enable most employees to work from home or remote locations; a majority (51%) has automated calling systems to reach employees by telephone or cell phone outside of work.