2011 AT&T Business Continuity Study
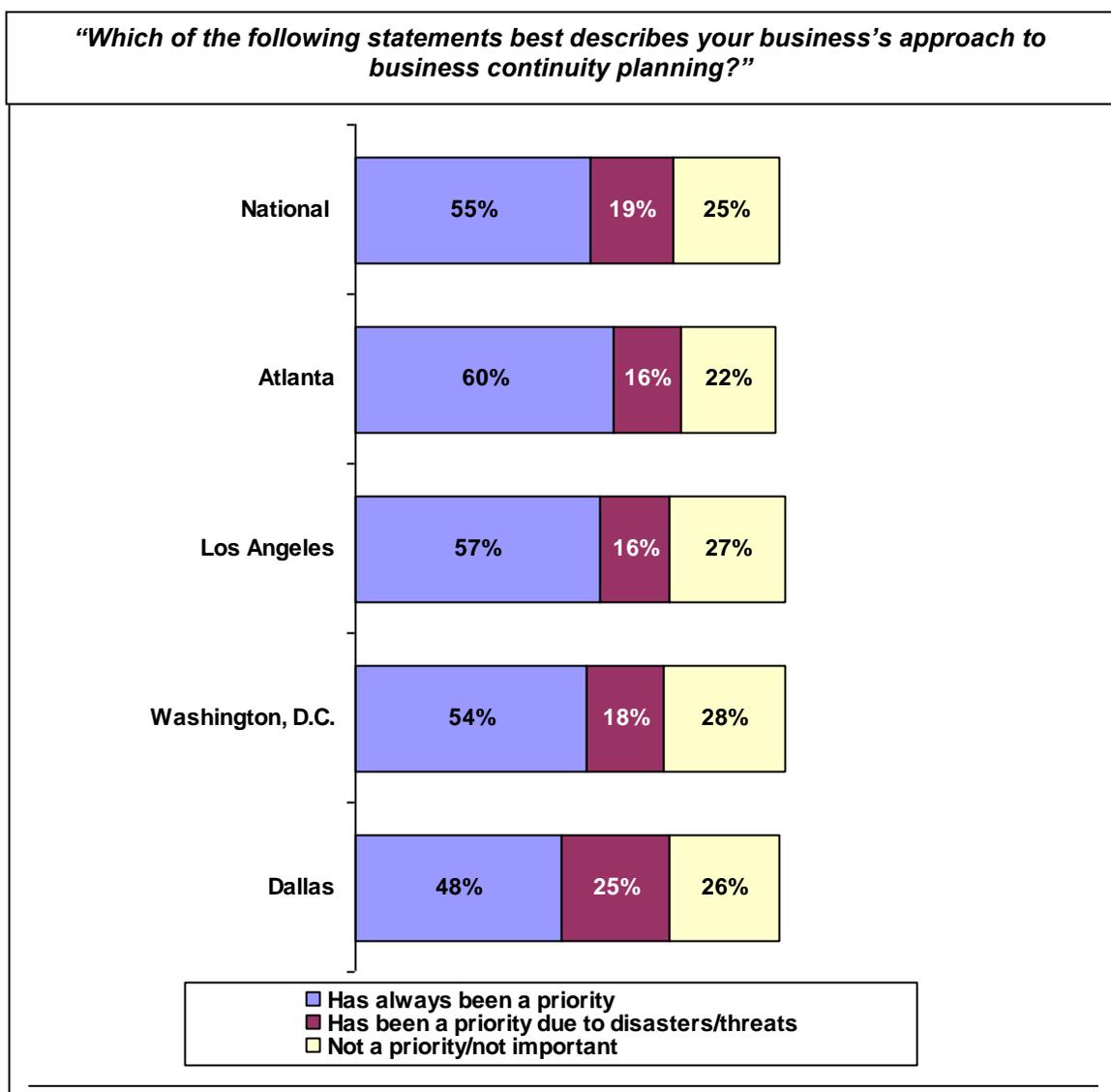## U.S. National Results

Methodology

The 2011 AT&T Business Continuity Study is based on an online survey of 401 Information Technology (IT) executives in four U.S. metropolitan areas: Dallas, Los Angeles, Atlanta and Washington, D.C. The study was conducted by e-Rewards Market Research with companies having total revenues of more than $25 million. Surveys were obtained between February 23 and March 17, 2011.

All survey respondents have primary responsibility for business continuity planning, representing 18 major industry areas in addition to local/state government. Sixty-nine percent (69%) represent companies with locations outside of the U.S.
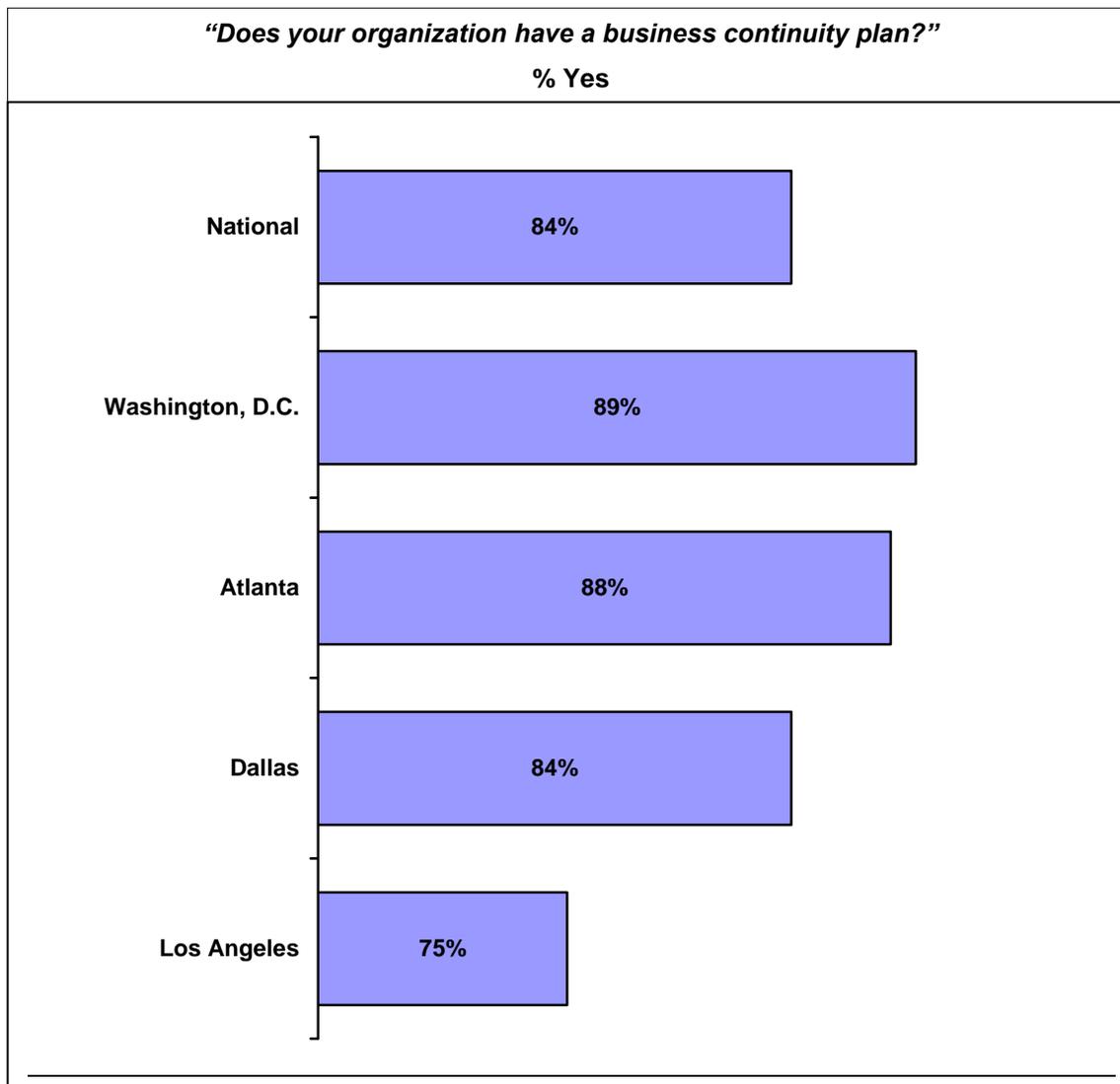
Key Findings

- **Business continuity planning is seen as a "priority" by three out of four (74%) IT executives across the United States**. A majority (55%) indicates it has always been a priority for their business, and one-fifth (19%) indicates it has become a priority in recent years due to natural disasters, security and terrorist threats.

  o Nonetheless, one-fourth (25%) of all executives say business continuity planning is "not a priority."

"Which of the following statements best describes your business's approach to business continuity planning?"

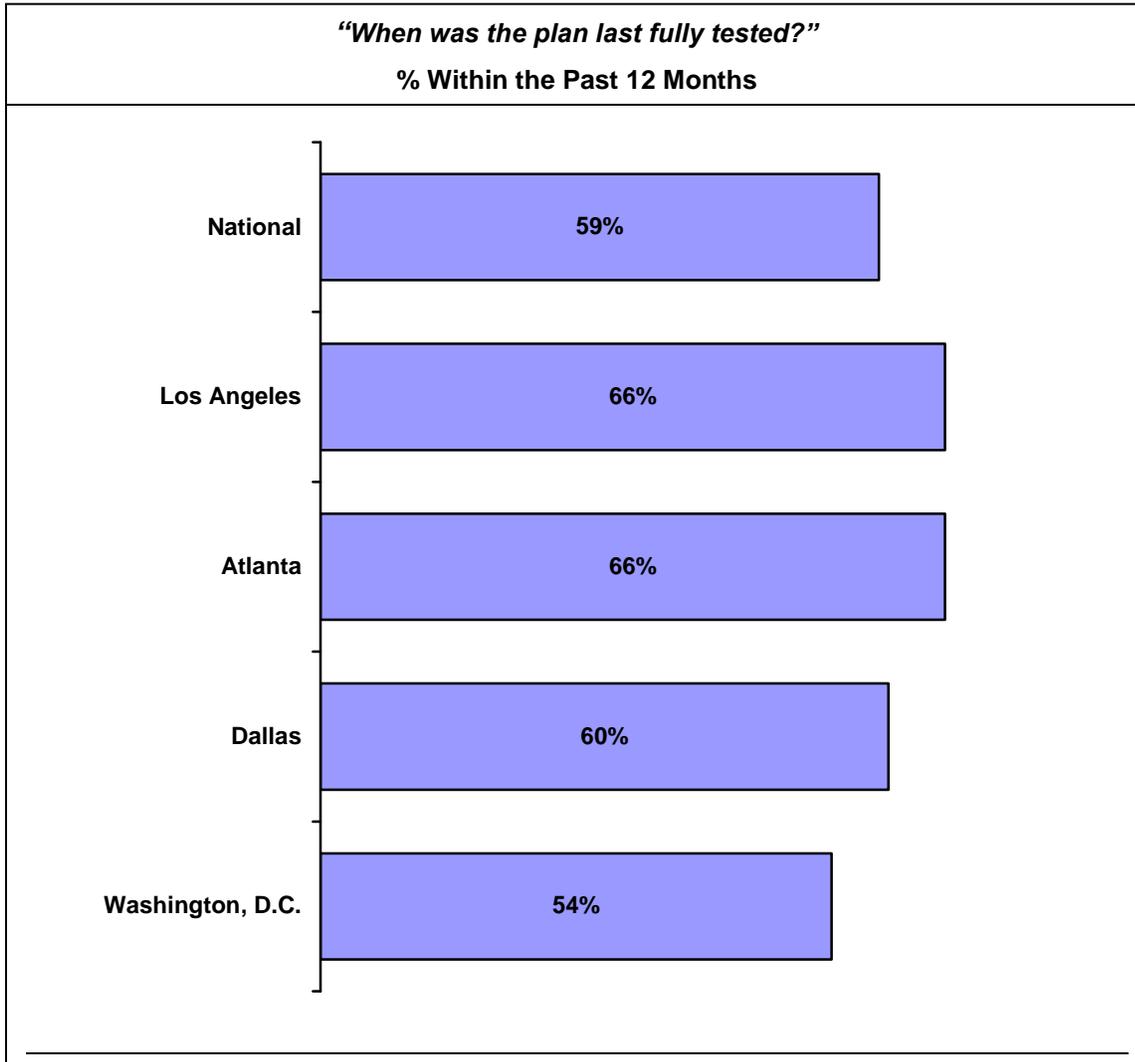|	Has always been a priority	Has been a priority due to disasters/threats	Not a priority/not important
National	55%	19%	25%
Atlanta	60%	16%	22%
Los Angeles	57%	16%	27%
Washington, D.C.	54%	18%	28%
Dallas	48%	25%	26%

- **Eight out of 10 (84%) executives indicate their companies have a business continuity plan.** One out of 10 (10%) indicates their company does not have a plan, and 6% don't know if a plan is in place or not.

  o Los Angeles companies are less likely than those in other cities to have a business continuity plan (75%).

"Does your organization have a business continuity plan?"

% Yes

|	
National	84%
Washington, D.C.	89%
Atlanta	88%
Dallas	84%
Los Angeles	75%

- **A majority (59%) of companies have had their business continuity plans fully tested in the past year.**

  o Almost one-fifth (17%) last fully tested their plans more than one year ago, and 4% indicate their plans have never been fully tested.

"When was the plan last fully tested?"

% Within the Past 12 Months

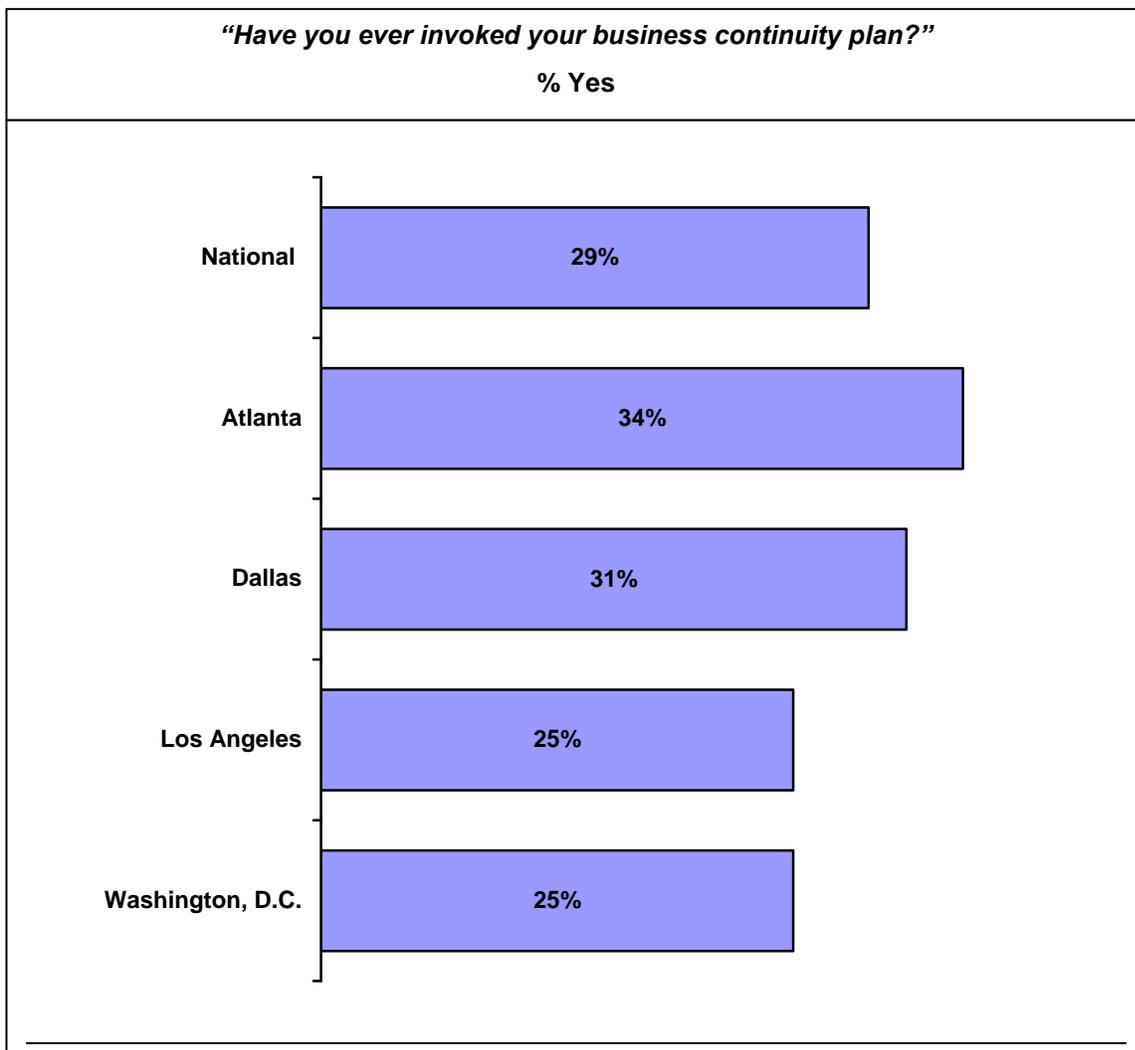| Region	%
National	59%
Los Angeles	66%
Atlanta	66%
Dallas	60%
Washington, D.C.	54%

- **Nationally, two-thirds (65%) of companies implement specific protective actions when the federal or state government issues an alert for an impending disaster.**

"When the federal or state government issues an alert for an impending disaster, do you implement specific protective actions?"
% Yes

National — 65%

Atlanta — 70%

Washington, D.C. — 66%

Dallas — 65%
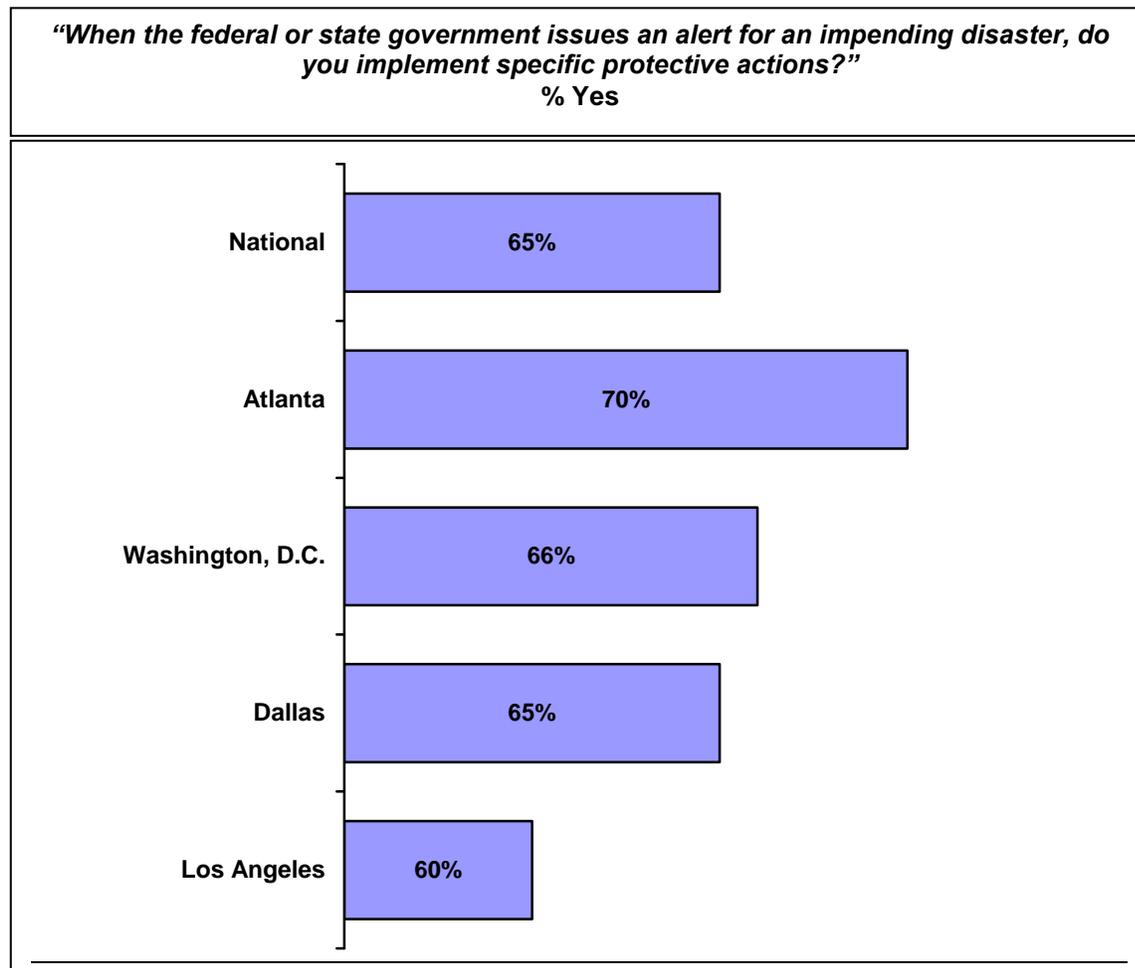
Los Angeles — 60%

- **The importance of business continuity plans is evident by the additional requirements that companies have regarding the plans.**

  o Six out of 10 (64%) include wireless network capabilities as part of their plan.

    ✓ Los Angeles companies are least likely to do so (52% compared to 64%, nationally)

  o Three-fourths (78%) indicate that employee use of mobile devices plays a major/minor role in the business continuity plan.

- **Nationally, three out of 10 (29%) companies have ever invoked their business continuity plan.**

  o Nationally, companies are most likely to invoke their business continuity plan due to extreme weather (13%) or power outages at facilities (9%).

    ✓ Atlanta executives are significantly more likely than those in other markets to have invoked their business continuity plan due to extreme weather (21% compared to 13%, nationally).

"Have you ever invoked your business continuity plan?"
% Yes

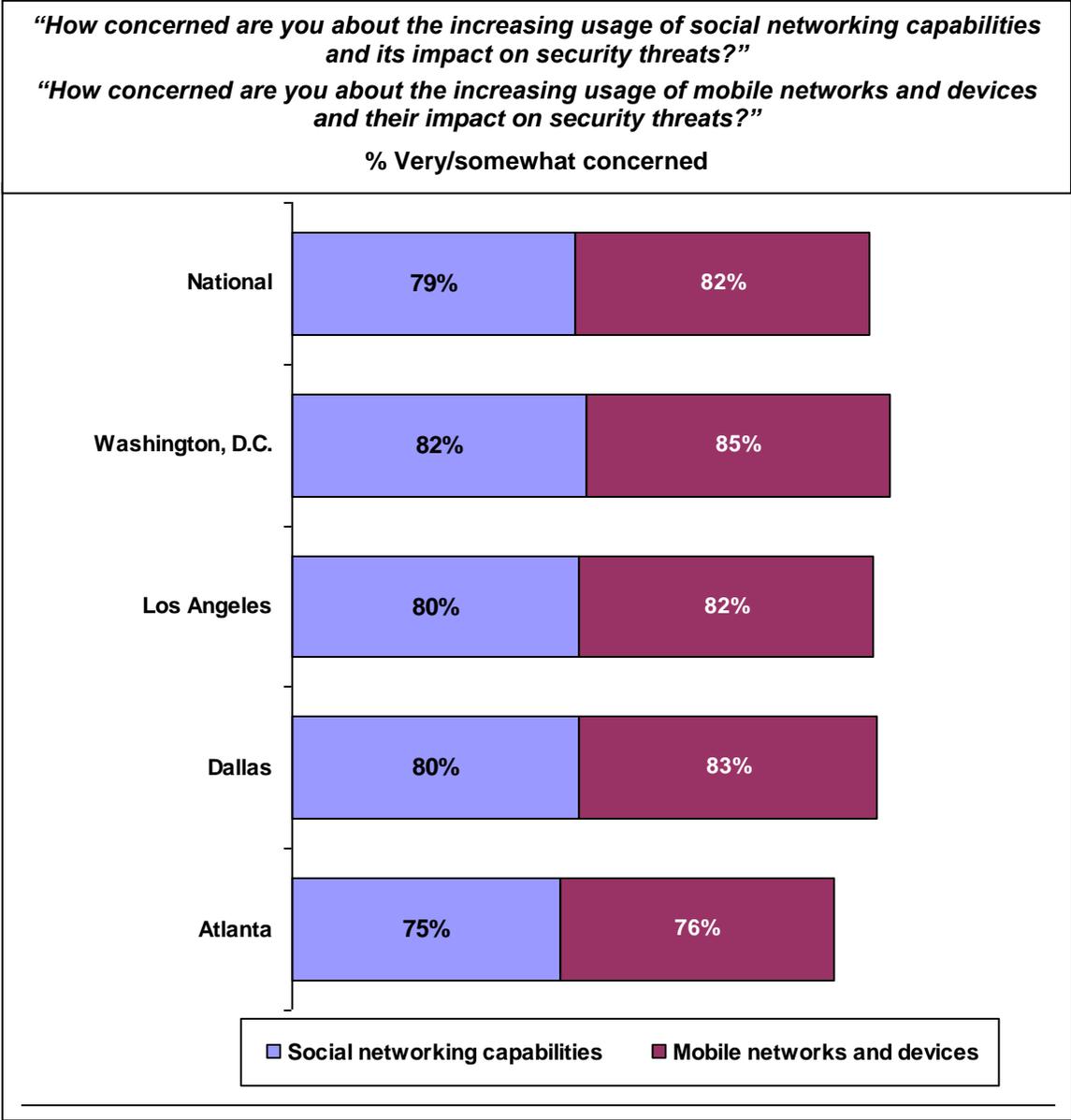|	
National	29%
Atlanta	34%
Dallas	31%
Los Angeles	25%
Washington, D.C.	25%

- **Nationally, a majority (56%) of companies provide employees with access to social networking tools from the corporate network.**

  o Employees most frequently have access to Facebook (46%), LinkedIn (45%), Twitter (40%) and YouTube (32%).

"Does your company provide employees with access to any social networking tools from the corporate network?"

% Yes
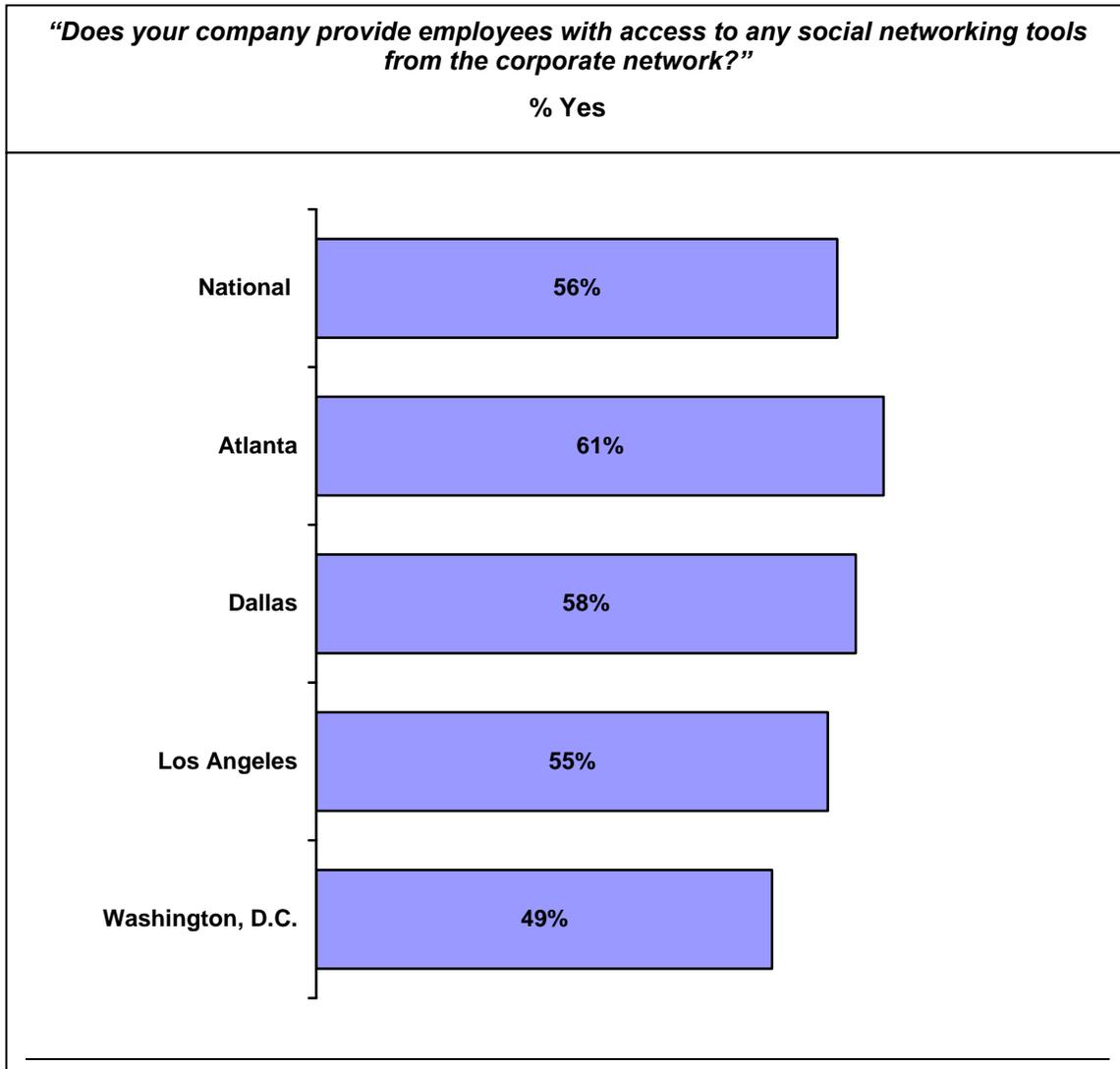
Most IT executives are concerned about the increased usage of social networking capabilities and mobile networks/devices and their potential impact on security threats.

o Three out of four executives are very/somewhat concerned about the increased use of social networking capabilities (79%), and eight out of 10 are concerned about mobile networks/devices (82%).

"How concerned are you about the increasing usage of social networking capabilities and its impact on security threats?"

"How concerned are you about the increasing usage of mobile networks and devices and their impact on security threats?"

% Very/somewhat concerned

	Social networking capabilities	Mobile networks and devices
National	79%	82%
Washington, D.C.	82%	85%
Los Angeles	80%	82%
Dallas	80%	83%
Atlanta	75%	76%

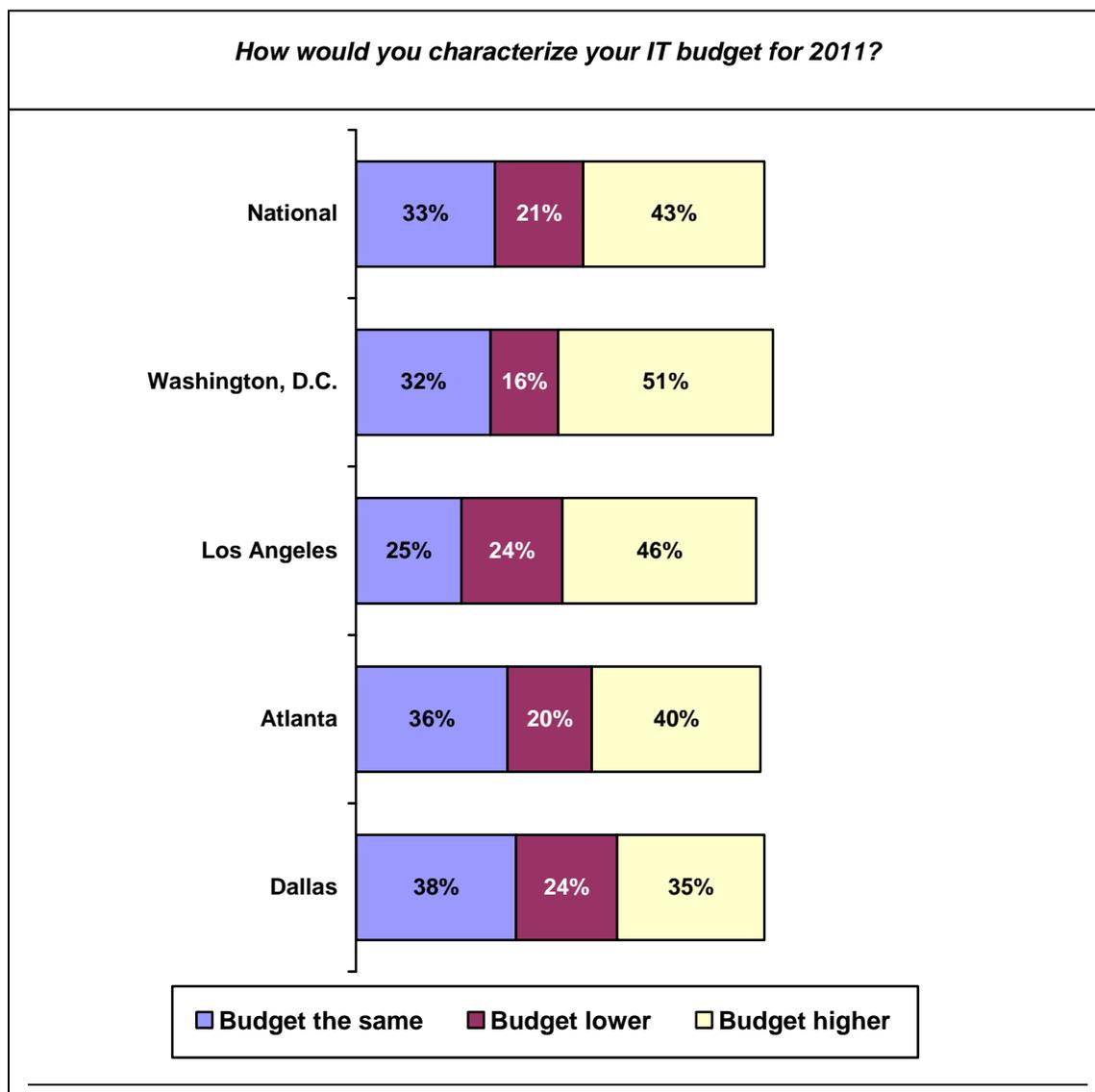■ Social networking capabilities   ■ Mobile networks and devices

- **Most (80%) companies have special arrangements for communicating with key executives during a natural disaster.**

  o A similar proportion (86%) has e-mail or text messaging capabilities to reach employees outside of work, and three-fourths (80%) have systems in place that enable most employees to work from home or remote locations.

  o Half (53%) have automated calling systems to reach employees by telephone or cell phone outside of work.

"In the event of a natural disaster, do you have:"
% Yes, National Results

E-mail or text messaging capabilities to reach employees outside of work — 86%

Special arrangements for communicating with key executives — 80%

Systems in place that enable most employees to work from home or remote locations — 80%

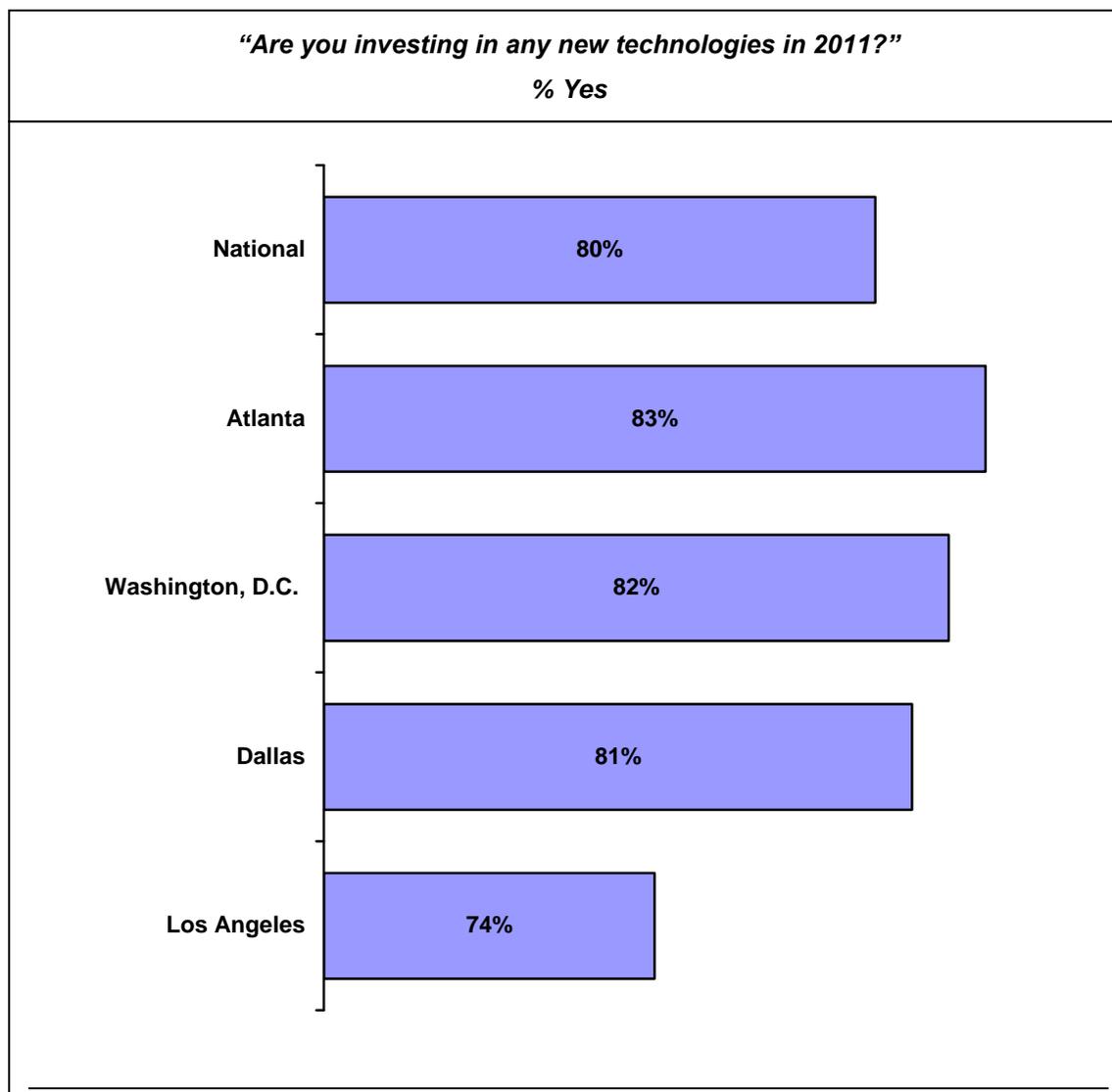**Automated calling systems to reach employees outside of work** — 53%
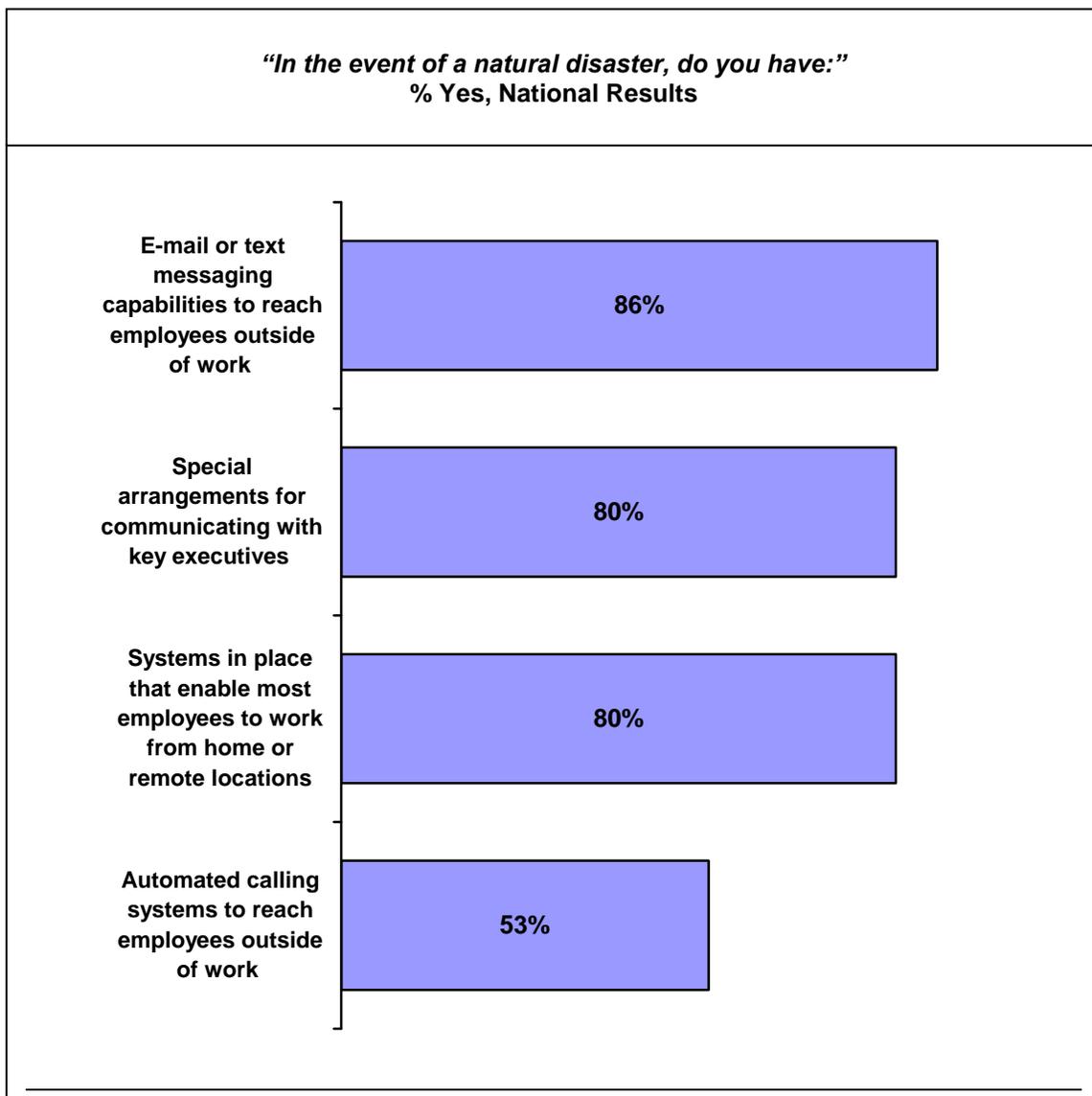
- **Thinking ahead for 2011, IT budgets are expected to be about the same or higher than in the previous two years (76%). A plurality (43%) indicates their budgets will be higher, and one-third (33%) indicates it will remain about the same.**

  - Only one-fifth (21%) of all executives indicate that budgets will be lower.

  - Executives in Washington, D.C. are most likely to indicate that their IT budgets are higher than two years ago (51% compared to 43%, nationally).

How would you characterize your IT budget for 2011?

Region	Budget the same	Budget lower	Budget higher
National	33%	21%	43%
Washington, D.C.	32%	16%	51%
Los Angeles	25%	24%	46%
Atlanta	36%	20%	40%
Dallas	38%	24%	35%

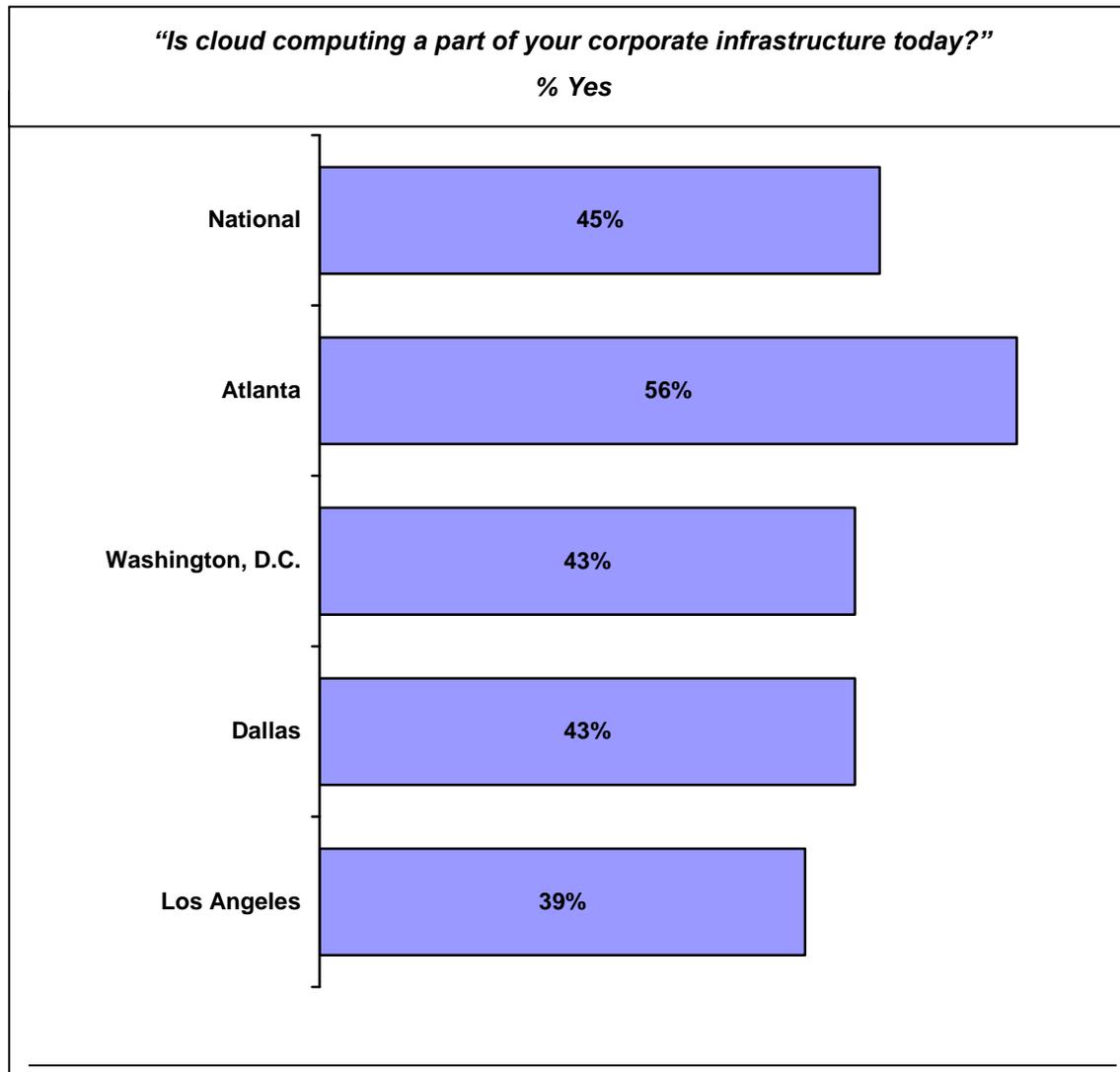□ Budget the same   ■ Budget lower   □ Budget higher

- **Investment in new technologies will increase significantly in 2011.**

  o Eight out of 10 (80%) executives indicate that their companies will be investing in new technologies for 2011, up from 72% who indicated this was the case in 2010. Investment tends to focus on cloud computing (43%), mobile applications (38%) and virtualization (33%).

"Are you investing in any new technologies in 2011?"

% Yes

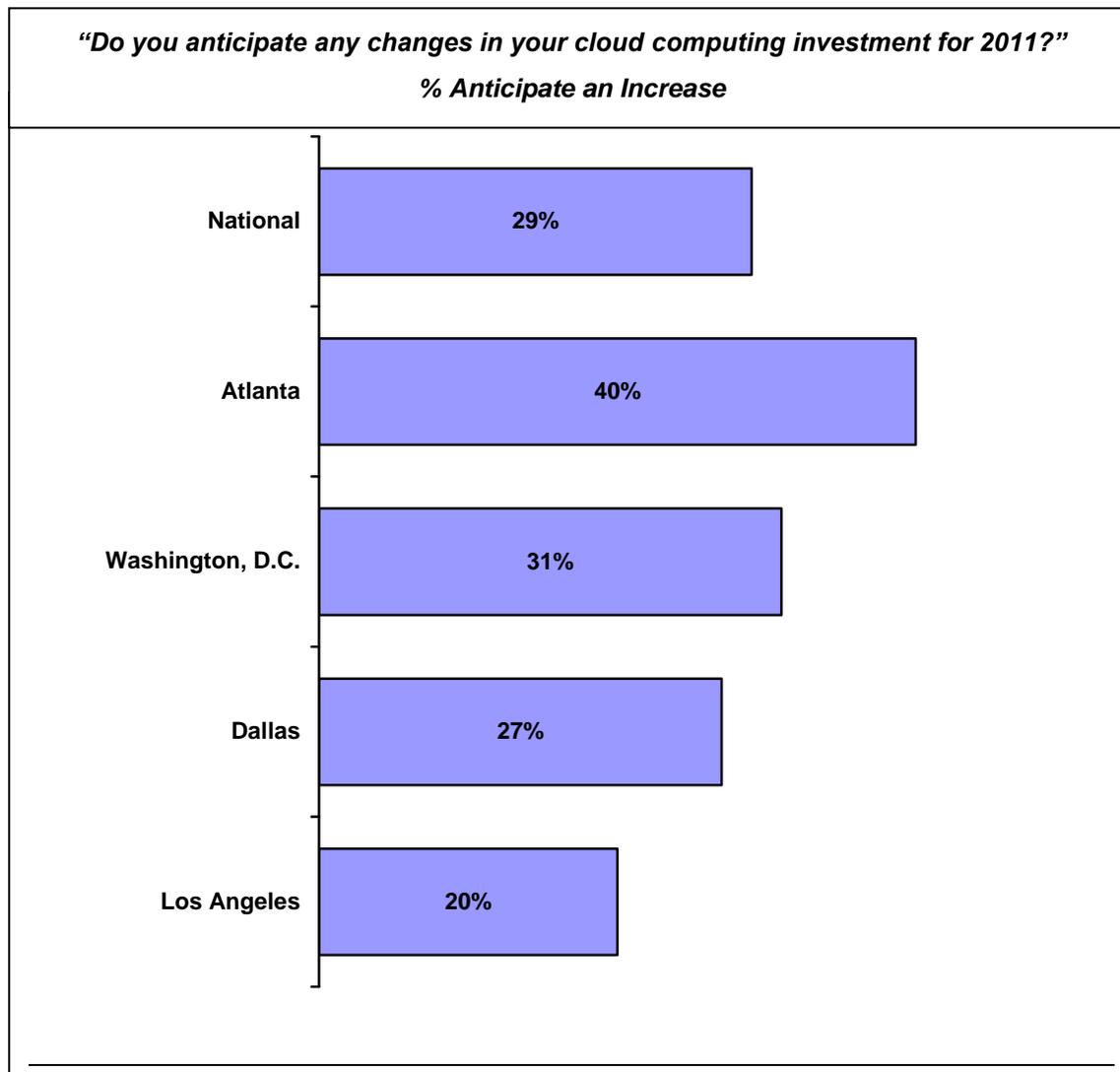| Region	% Yes
National	80%
Atlanta	83%
Washington, D.C.	82%
Dallas	81%
Los Angeles	74%

- **Four out of 10 (45%) executives indicate that cloud computing is part of their corporate infrastructure.**

  - Executives in Atlanta are most likely to indicate that cloud computing is currently part of their corporate infrastructure (56% compared to 45%, nationally).

  - Companies are most likely to currently invest in Software as a Service (28%), Infrastructure as a Service (20%) and Platform as a Service (16%).

  - In 2011, larger proportions plan to invest in Software as Service (38%), Infrastructure as a Service (26%) and Platform as a Service (26%).

"Is cloud computing a part of your corporate infrastructure today?"

% Yes

National	45%
Atlanta	56%
Washington, D.C.	43%
Dallas	43%
Los Angeles	39%

- **Three out of 10 (29%) executives anticipate an increase in their cloud computing investment for 2011.**

  - Executives in Atlanta are most likely to indicate that the investment in cloud computing will increase in 2011 (40% compared to 29%, nationally).

"Do you anticipate any changes in your cloud computing investment for 2011?"

% Anticipate an Increase

Region	%
National	29%
Atlanta	40%
Washington, D.C.	31%
Dallas	27%
Los Angeles	20%

- **A majority (54%) of companies are currently using or considering using cloud services to augment their business continuity/disaster recovery strategy. One-fourth (25%) is currently using cloud services, while 29% are considering doing so.**

  o Executives in Atlanta are most likely to indicate that they are or are considering using cloud services for their disaster recovery strategy (67% compared to 54%, nationally).

"Are you considering use of cloud services to augment your business continuity/disaster recovery strategy?"

	Currently using	Considering using
National	25%	29%
Atlanta	36%	31%
Washington, D.C.	24%	37%
Dallas	22%	16%
Los Angeles	20%	32%