



2011 AT&T Business Continuity Study

London Results

Methodology

The following results are based on an online survey of 100 Information Technology (IT) executives in the London 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 London Area were obtained between March 10 and March 17, 2011.

All survey respondents have primary responsibility for business continuity planning, representing 14 major industry areas in addition to local/state government.



Key Findings

IT Plans for 2011

- **IT budgets for 2011 are about the same or higher than those of the previous two years.** Six out of ten (62%) executives indicate that their IT budgets for 2011 are the same or higher than the previous two years; 29% indicate the budgets are about the same, and 33% indicate the budgets are higher.
- **Investment in new technologies will continue in 2011.** Eight out of 10 (85%) executives indicate that their companies are investing in new technologies in 2011.
 - More than one-fourth (27%) indicates that their company's main motivation for investing in new technologies is to grow and expand the business followed by increasing productivity (25%).

Business Continuity Plans

- **Almost all (91%) London executives indicate their companies have a business continuity plan.**
 - Seven out of ten (71%) indicate their companies implement specific protective actions when the federal or state government issues an alert for an impending disaster.
 - A majority (61%) of these companies have had their business continuity plans fully tested in the past 12 months.
 - The vast majority (75%) is concerned about the increasing use of mobile networks and devices and its impact on security threats; however, only 21% are very concerned.
 - One-fourth (27%) of these executives indicate that their company has invoked its business continuity plan. The most frequent reason for invoking the plan was due to power outages (10%) or IT failure (10%).



Cloud Computing

- **When asked in what new technologies their company would be investing during 2011, four out of ten (41%) indicated cloud computing would be one of the investments.**
- **Currently, more than one-third (37%) of executives indicate cloud computing is a part of their corporate infrastructure.**
 - About one-fifth (22%) anticipates an increase in investment in cloud computing in 2011.
 - A plurality (45%) already uses or is considering using cloud services to augment their business continuity/disaster recovery strategy.
- **One-fifth (21%) plans to invest in cloud computing in 2011 even though they currently do not include this as part of their corporate infrastructure.**

Social Networking

- **Half (50%) of these companies provide employees with access to social networking tools.**
 - Most frequently, employees have access to LinkedIn (42%), Facebook (35%), Twitter (28%) and YouTube (28%).
 - Social networking is typically used to proactively share news and content about the business with customers or other stakeholders (20%), directly communicating and engaging with customers or other stakeholders (22%) and for monitoring news and other chatter (22%).
 - Most (70%) executives are concerned about the increasing use of social networking capabilities and its impact on security threats; however, only one-fifth (22%) is very concerned.

Communicating During Natural Disasters

- **Most (83%) executives indicate that they have special arrangements for communicating with key executives in the event of a natural disaster.**



- A similar proportion (89%) has e-mail or text messaging capabilities to reach employees outside of work.
- Eight out of 10 (85%) have systems in place that enable most employees to work from home or remote locations; more than one-third (39%) 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.** Six out of ten (62%) executives indicate that their IT budgets for 2011 are the same or higher than the previous two years; 29% indicate the budgets are about the same, and 33% indicate the budgets are higher. One-third (32%) indicates 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 (85%) executives indicate that their companies are investing in new technologies in 2011.
 - Executives most frequently mention that they will be investing in cloud computing (41%), mobile applications (36%), virtualization (36%), unified communications (15%) and hosted services (28%).
- **Investment in new technologies helps business growth and increases productivity.** More than one-fourth (27%) of these executives indicate that the primary motivation for investing in new technologies is to grow and expand the business followed by increased productivity (25%). One-fourth (21%) indicates that investing in new technologies also helps to reduce costs.

Business Continuity Plans

- **Business continuity planning is seen as a “priority” by almost three-fourths (73%) of IT executives in the London area.** Half (53%) indicate it has always been a priority for their business, and one-fifth (20%) indicates it has become a priority in recent years due to natural disasters, security and terrorist threats.



- One-fourth (25%) of the executives indicate business continuity is “not a priority.”
- **Almost all (91%) of these executives indicate their companies have a business continuity plan.** Following are specific details about these plans.
 - Seven out of ten (71%) indicate their companies implement specific protective actions when the federal or state government issues an alert for an impending disaster.
 - A majority (61%) of these companies have had their business continuity plans fully tested in the past 12 months. Only 8% indicate that their plans have never been tested.
 - Two-thirds (65%) include their wireless network capabilities as part of the business continuity plan.
 - A majority (57%) indicates that employee use of mobile devices plays a major role in the business continuity plan; another one-third (32%) indicates this plays a minor role.
 - A majority (86%) indicates that at least 20% of their company’s employees use mobile devices that are maintained by the IT department.
 - Two-thirds (66%) indicate that employees are allowed to access work e-mails on their personal smartphones.
 - The vast majority (75%) is concerned about the increasing use of mobile networks and devices and its impact on security threats; however, only one-fifth (21%) is very concerned.
 - Three out of 10 (27%) executives indicate that their company has invoked its business continuity plan. Reasons for invoking the plan most frequently involve:
 - Power outages at facilities (10%)
 - IT failures (10%)
 - Extreme weather (6%)



Cloud Computing

- **More than one-third (37%) of these executives indicate cloud computing is currently a part of their corporate infrastructure.**
 - Currently, companies most frequently invest in software as a service (20%), infrastructure as a service (20%) and platform as a service (19%).
 - One out of six (16%) 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 twenty (6%) spends less than \$100,000 annually.
 - More than one-fifth (22%) anticipates an increase in investment in cloud computing in 2011.
 - During 2011, one-third (35%) plans to invest in software as a service, followed by infrastructure as a service (29%) and platform as a service (21%).
 - A plurality (45%) already uses or is considering using cloud services to augment their business continuity/disaster recovery strategy.
 - One out of seven (15%) is already using cloud services for this purpose, and another three out of ten (30%) are considering doing so.
 - The most likely uses of cloud computing for disaster recovery purposes are data storage (36%), Web servers (30%), application servers (29%) and database (24%).
- **One-fifth (21%) plans to invest in cloud computing in 2011 even though they currently do not include this as part of their corporate infrastructure.**

Social Networking

- **Half (50%) of these companies provide employees with access to social networking tools.**



- One-third (32%) indicates that social networking is generally accepted and widely used; three out of ten (30%) indicate that social networking is generally accepted but used by only a few. Almost four out of ten (38%) indicate that social networking is not accepted and rarely used.
- Most frequently, employees have access to LinkedIn (42%), Facebook (35%), Twitter (28%) and YouTube (28%).
- Social networking is typically used to proactively share news and content about the business with customers or other stakeholders (20%), directly communicating and engaging with customers or other stakeholders (22%) and for monitoring news and other chatter (22%).
 - One out of ten (13%) is exploring the use of social media but are not yet active, and one-fifth (22%) has no plans for social media activity in the near future.
- Most (70%) executives are concerned about the increasing use of social networking capabilities and its impact on security threats; however, only one-fifth (22%) is very concerned.

Communicating During Natural Disasters

- **Most (83%) executives indicate that they have special arrangements for communicating with key executives in the event of a natural disaster.**
 - A similar proportion (89%) has e-mail or text messaging capabilities to reach employees outside of work.
 - Eight out of 10 (85%) have systems in place that enable most employees to work from home or remote locations; four out of ten (39%) have automated calling systems to reach employees by telephone or cell phone outside of work.