



## **2011 AT&T Business Continuity Study**

### Washington, D.C. Results

#### **Methodology**

The following results are based on an online survey of 101 Information Technology (IT) executives in the Washington, D.C. 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 were obtained between March 10 and March 17, 2011.

All survey respondents have primary responsibility for business continuity planning, representing 17 major industry areas in addition to local/state government. Two-thirds (68%) represent companies with locations outside of the U.S.



## Key Findings

### *IT Plans for 2011*

- **IT budgets for 2011 are higher than those of the previous two years.** A majority (51%) of executives indicate that their IT budgets for 2011 are higher than the previous two years. One-third (32%) indicates that the budgets are about the same, and only 16% indicate that budgets are lower than the previous two years.
- **Investment in new technologies will continue in 2011.** Eight out of 10 (82%) executives indicate that their companies are investing in new technologies in 2011.
  - Three out of ten (31%) indicate that their company's main motivation for investing in new technologies is to increase productivity, followed by one-fourth (24%) who indicates the motivation is to grow and expand the business.

### *Business Continuity Plans*

- **Almost all (89%) executives in the Washington, D.C. area indicate their companies have a business continuity plan.**
  - Two-thirds (66%) indicate their companies implement specific protective actions when the federal or state government issues an alert for an impending disaster.
  - A majority (54%) of these companies have had their business continuity plans fully tested in the past 12 months.
  - The vast majority (86%) is concerned about the increasing use of mobile networks and devices and its impact on security threats; however, more than one-third (38%) is very concerned.
  - One-fourth (25%) of these executives indicate that their company has invoked its business continuity plan. The most frequent reason for invoking the plan was due to extreme weather (10%) or power outages (7%).



## ***Cloud Computing***

- **When asked in what new technologies their company would be investing during 2011, almost half (49%) indicate cloud computing would be one of the investments.**
- **Currently, more than four out of ten (43%) executives indicate cloud computing is a part of their corporate infrastructure.**
  - Three out of ten (31%) anticipate an increase in investment in cloud computing in 2011.
  - A majority (61%) already uses or is considering using cloud services to augment their business continuity/disaster recovery strategy.
- **One-fourth (25%) 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 (49%) of these companies provide employees with access to social networking tools.**
  - Most frequently, employees have access to Facebook (43%), LinkedIn (42%), Twitter (37%) and YouTube (30%).
  - Social networking is typically used to proactively share news and content about the business with customers or other stakeholders (23%), directly communicating and engaging with customers or other stakeholders (28%) and for monitoring news and other chatter (14%).
  - Most (83%) executives are concerned about the increasing use of social networking capabilities and its impact on security threats; one-third (33%) is very concerned.



## ***Communicating During Natural Disasters***

- **Most (79%) executives indicate that they have special arrangements for communicating with key executives in the event of a natural disaster.**
  - A similar proportion (86%) has e-mail or text messaging capabilities to reach employees outside of work.
  - Eight out of 10 (83%) have systems in place that enable most employees to work from home or remote locations; four out of ten (46%) have 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 higher than those of the previous two years.** A majority (51%) indicates that their IT budgets for 2011 are higher than the previous two years. One-third (32%) indicates the budget is remaining about the same, while only 16% indicate the budget is lower than in the previous two years.
- **Investment in new technologies will continue in 2011.** Eight out of 10 (82%) executives indicate that their companies are investing in new technologies in 2011.
  - Executives most frequently mention that they will be investing in cloud computing (49%), virtualization (44%), mobile applications (41%), hosted services (32%) and unified communications (23%).
- **Investment in new technologies helps increase productivity and grow and expand the business.** Three out of ten (31%) executives indicate that the primary motivation for investing in new technologies is to increase productivity, followed by growing and expanding the business (24%).

### *Business Continuity Plans*

- **Business continuity planning is seen as a “priority” by almost three-fourths (72%) of IT executives in the Washington, D.C. area.** Half (54%) indicate it has always been a priority for their business, and one-fifth (18%) indicates it has become a priority in recent years due to natural disasters, security and terrorist threats.
  - One-fourth (28%) of the executives indicate business continuity is “not a priority.”
- **Almost all (89%) of these executives indicate their companies have a business continuity plan.** Following are specific details about these plans.
  - Two-thirds (66%) indicate their companies implement specific protective actions when the federal or state government issues an alert for an impending disaster.



- A majority (54%) 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 (66%) include their wireless network capabilities as part of the business continuity plan.
  - Almost half (47%) indicate that employee use of mobile devices plays a major role in the business continuity plan; another one-third (34%) indicates this plays a minor role.
  - The vast majority (79%) indicates that at least 20% of their company's employees use mobile devices that are maintained by the IT department.
  - Seven out of ten (71%) indicate that employees are allowed to access work e-mails on their personal Smartphones.
  - Most (86%) are concerned about the increasing use of mobile networks and devices and its impact on security threats; more than one-third (38%) is very concerned.
- One-fourth (25%) of these executives indicate that their company has invoked its business continuity plan. Reasons for invoking the plan most frequently involve:
  - Extreme weather (10%)
  - Power outages at facilities (7%)
  - IT failures (3%)

### ***Cloud Computing***

- **Four out of ten (43%) executives indicate cloud computing is currently part of their corporate infrastructure.**
  - Currently, companies most frequently invest in software as a service (32%), infrastructure as a service (21%) and platform as a service (20%).
  - One-fourth (25%) of these companies indicate they currently spend more than \$500,000 annually on cloud computing.



- One out of ten (11%) spends \$100,000 to \$500,000, and another one out of twenty (5%) spends less than \$100,000 annually.
- Almost one-third (31%) anticipates an increase in investment in cloud computing in 2011.
- During 2011, four out of ten (44%) plan to invest in software as a service, followed by infrastructure as a service (32%) and platform as a service (29%).
- A majority (61%) already uses or is considering using cloud services to augment their business continuity/disaster recovery strategy.
- One-fourth (24%) is already using cloud services for this purpose, and another four out of ten (37%) are considering doing so.
- The most likely uses of cloud computing for disaster recovery purposes are application servers (44%), data storage (43%), Web servers (37%) and database (29%).
- **One-fourth (25%) 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 (49%) of these companies provide employees with access to social networking tools.**
  - One-third (36%) indicates that social networking is generally accepted and widely used; four out of ten (40%) indicate that social networking is generally accepted but used by only a few. One-fourth (23%) indicates that social networking is not accepted and rarely used.
  - Most frequently, employees have access to Facebook (43%), LinkedIn (42%), Twitter (37%) and YouTube (30%).
  - Social networking is typically used to proactively share news and content about the business with customers or other stakeholders (23%), directly communicating and engaging with customers or other stakeholders (28%) and for monitoring news and other chatter (14%).



- One-fifth (19%) is exploring the use of social media but is not yet active, and one out of seven (14%) has no plans for social media activity in the near future.
- Most (83%) executives are concerned about the increasing use of social networking capabilities and its impact on security threats; one-third (33%) is very concerned.

### ***Communicating During Natural Disasters***

- **Most (79%) executives indicate that they have special arrangements for communicating with key executives in the event of a natural disaster.**
  - A similar proportion (86%) has e-mail or text messaging capabilities to reach employees outside of work.
  - Eight out of 10 (83%) have systems in place that enable most employees to work from home or remote locations; four out of ten (46%) have automated calling systems to reach employees by telephone or cell phone outside of work.