



2009-2010 Preparedness, Security & Crisis Communications Survey

Presented by:

VAROLII
CORPORATION®

Honeywell

2009-2010

PREPAREDNESS, SECURITY & CRISIS COMMUNICATIONS SURVEY

2009-2010 Preparedness, Security & Crisis Communications Survey

The Third Annual Preparedness, Security and Crisis Communications Survey has been completed with over 400 participants from a wide range of industries and organizational sizes. Honeywell and Varolii Corporation conducted the study to determine significant changes in preparedness and communications practices since the 2008-09 survey was conducted. In addition, a new element was added to the study that examines the field of Security; its planning, procedures and solutions.

The increasing frequency of threat and business interruptions has made it absolutely critical that organizations quickly and accurately communicate with all stakeholders during an event. The mission of the Disaster Resource GUIDE has always been to “bring together” expertise from both the public and private sectors to enhance mitigation and to speed response during crises.

This study from Honeywell and Varolii offers keen insight into the direction of preparedness, security and crisis communications as seen by practitioners and leaders at the forefront of this field.

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Executive Publisher, The Disaster Resource GUIDE

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Survey Overview

In order to capture its current landscape, Honeywell and Varolii Corporation conducted the 2009-10 Survey of Preparedness, Security and Crisis Communications. This survey, conducted from July to August, 2009, covers the following topics:

- Preparedness Organizational Trends & Figures
- Influences on Preparedness Planning & Management
- People Preparedness
- Communications Practices & Tools
- Security Plans, Procedures & Solutions

DEMOGRAPHIC BREAKDOWN OF PARTICIPANTS

Industry – The 415 respondents of this survey represented a good mix of different industries, the majority of whom come from government agencies and companies in the healthcare/pharmaceutical, technology, education, commercial, and financial services sectors.

Size – Small to medium sized organizations were the majority represented with 52% fewer than 1,000 employees and 19% between 1,000 and 5,000. Organizations with more than 20,000 people made up 12%. 30% of participants work for organizations that have more than 20 locations.

Job Function – Most respondents participate in at least one of the following functions:

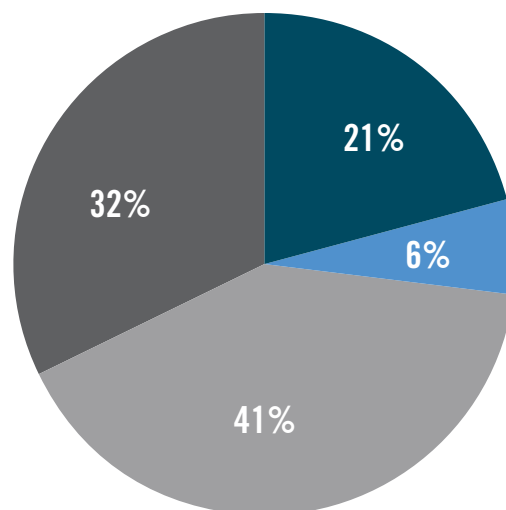
- Emergency preparedness
- Business Continuity and/or Disaster Recovery
- Security
- Executive Management
- Operations

Organizational Figures

- 73% of respondents have 25 people or fewer in emergency preparedness. This is likely related to the size of the organizations polled in this survey – most were 5000 people or fewer.
- 25% of respondents increased the size of their preparedness groups (vs. 30% in 2008), while 57% report that their group remained the same size. Only 11% report a decrease in group size.

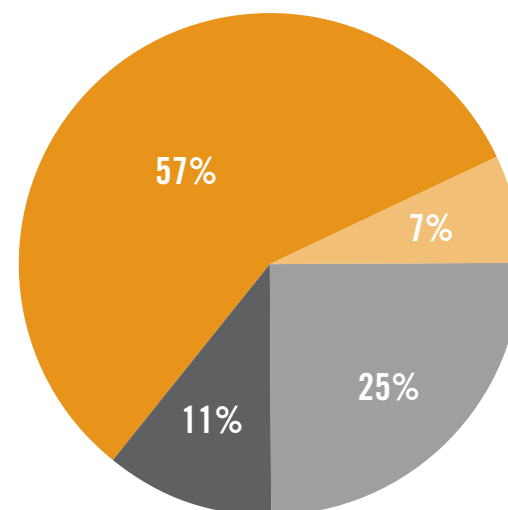
Key Takeaway: This may signal that even while many companies are tightening their belts, the investment in preparedness is still one that many organizations are making, as the growth figures are very similar to last year's figures.

How many employees are in your emergency preparedness group?



less than 5
 5-25
 more than 25
 Don't know

Has the size of your emergency preparedness group changed in the past year?



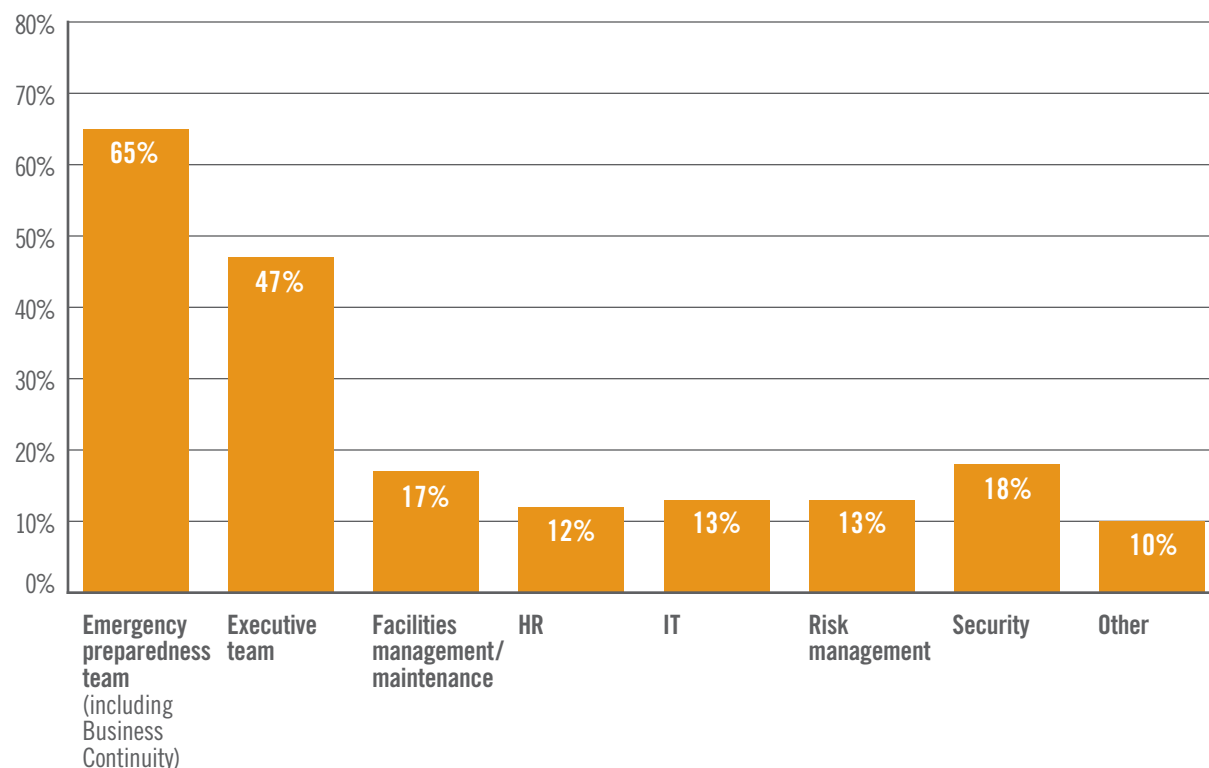
Yes, increased
 Yes, decreased
 No change
 Don't know

Organizational Figures

Overwhelmingly, members of the business continuity/disaster recovery team are responsible for overall operational execution or deployment of preparedness and communications plans during a critical event, making up 65% of the respondents (unchanged from 2008). However, executive involvement in the execution of the plan is very notable in 2009.

Key Takeaway: While preparedness plan execution is still primarily a Business Continuity and Disaster Recovery-centric responsibility, executive involvement is rising dramatically. This may signal that ensuring business resiliency is becoming a high priority for executive leadership.

Who is responsible for overall operational execution emergency preparedness and communications plans during a critical event?

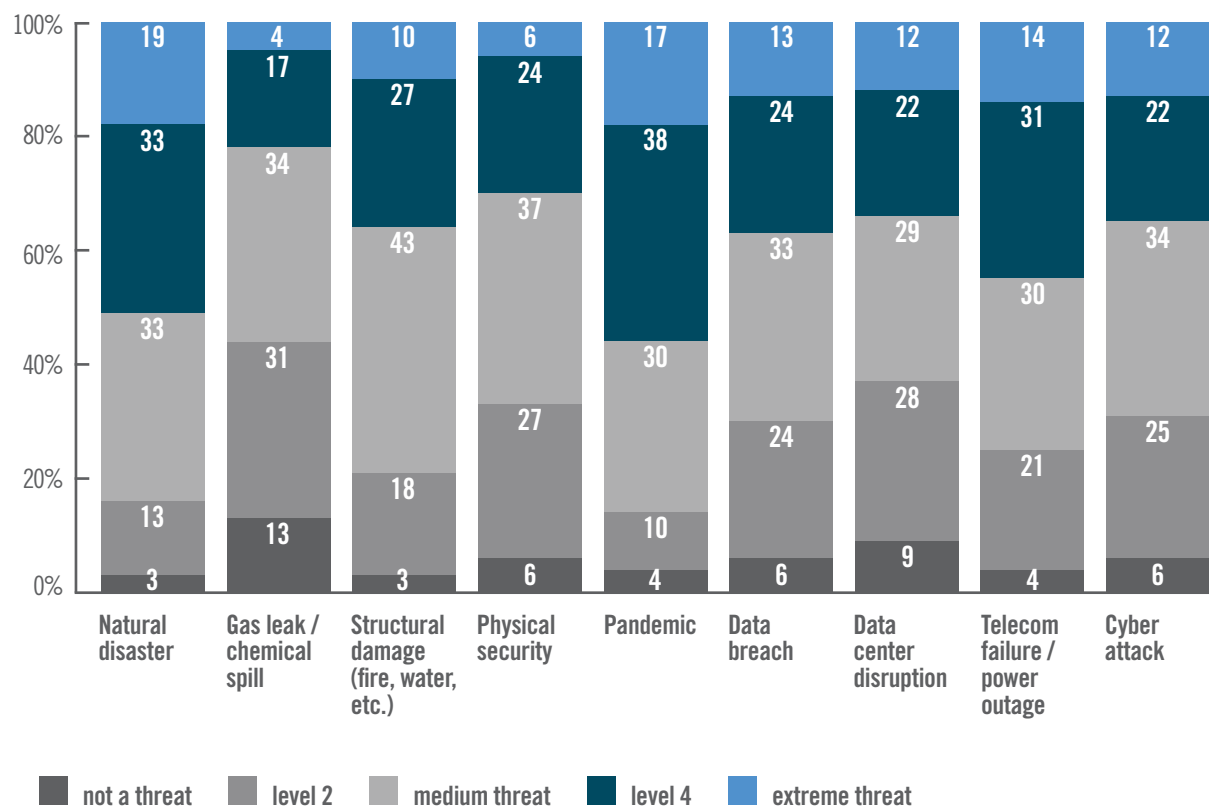


Influences on Preparedness Planning & Management

Unlike the results of 2008, pandemic ranked as the top threat to organizations (in light of the H1N1 outbreak in 2009). Threats focused on data security and telecom failure/power outage (the top threats in 2008) still ranked high this year, but not as high as a natural disaster, whose threat level jumped from last year to this year.

Trends of 2009: IT and infrastructure threats have decreased due to the recent emergence of H1N1 and some possible weather-related events. This is the first time since the survey was held (in 2007) that IT and data threats were not ranked at the top.

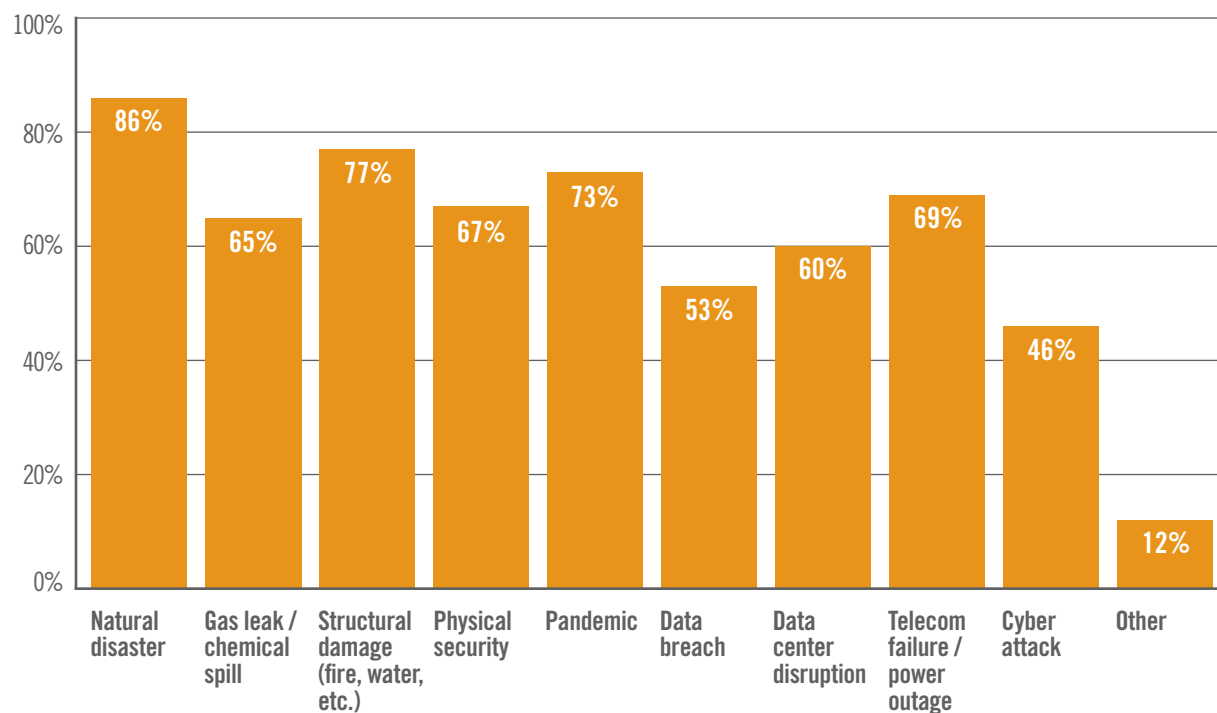
Listed below are types of events that may pose a threat to your company. Please rate each of the events based on their threat level to your organization.



Influences on Preparedness Planning & Management

Although the threat of cyber attacks and data breaches are top of mind, preparedness plans in place are notably lower as compared to other organizational threats (and they fell from last year). Pandemic preparedness rose in prominence for the first time since 2007, while preparedness for a natural disaster and structural disaster remained unchanged from last year.

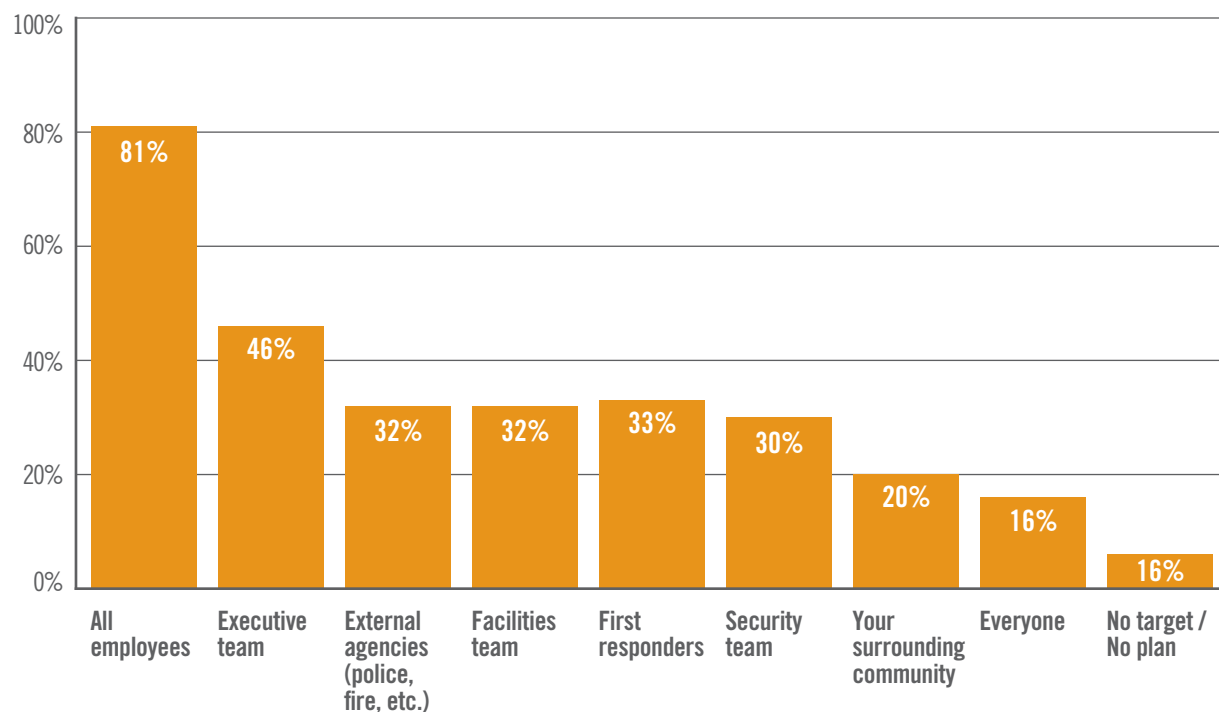
For which of these events do you have emergency preparedness / communications plans in place?



People Preparedness

81% of the organizations surveyed have communications plans that target all employees, vs. only 57% in 2008, when communications plans targeted mainly first responders or crisis management teams. This may indicate a further evolution and sophistication in crisis communications planning - and possibly tools to carry out those communications

To which group(s) does your emergency communications plan target?

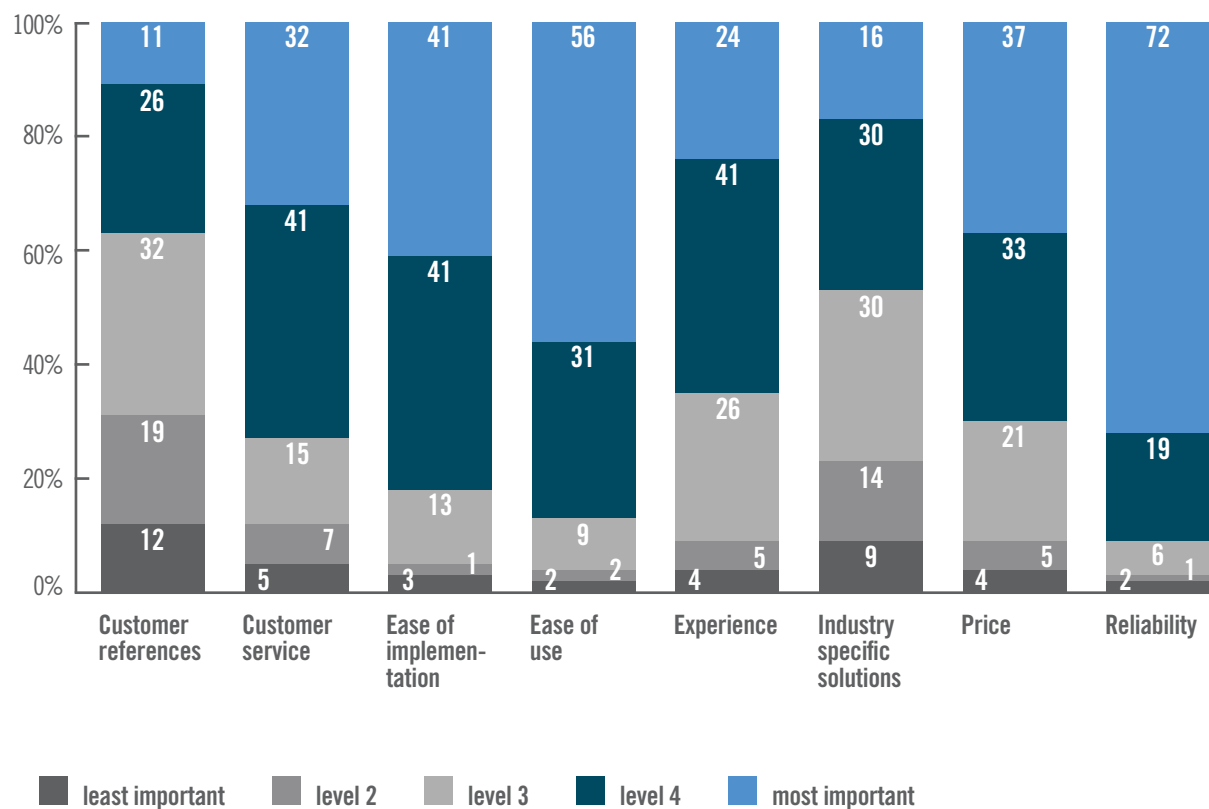


Communications Practices & Tools

Respondents overwhelmingly placed most emphasis on reliability as a primary evaluation point in selecting an emergency notification vendor (72% vs. 57% in 2008). Ease of use and implementation also saw a sharp increase vs. a year ago, while price of the solution actually fell in importance vs. prior years' results.

Key Takeaway: The shift in importance toward reliability, ease of use and implementation – and away from price – is an interesting result in tough economical times. It may signal a strong emphasis and commitment to long-term business resiliency.

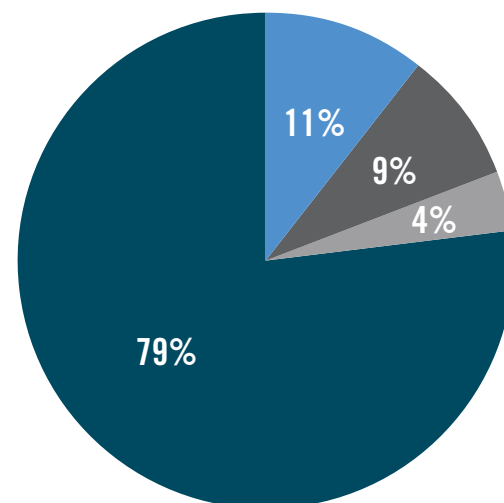
What characteristics of emergency notification systems are most important to you and your organization?



Security Plans, Procedures & Solutions

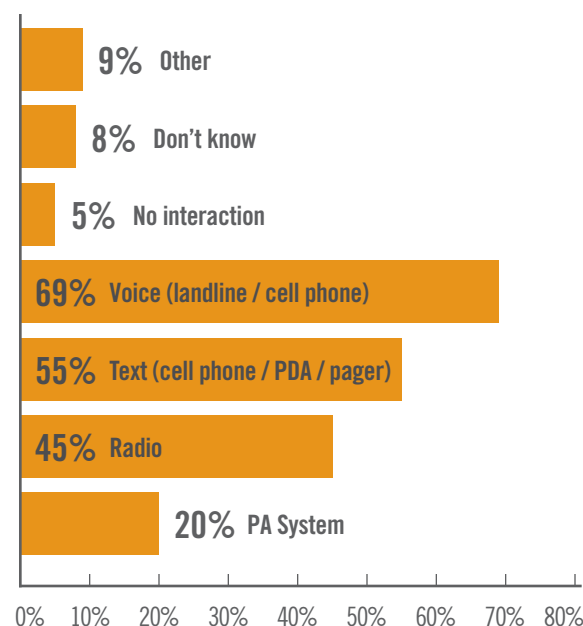
- Respondents overwhelmingly indicated that security groups and functions played a role in emergency preparedness plans, mitigation and recovery strategies (83%).
- While phone or cell phone remains the most common method for communicating with security staff (and all staff) in a crisis, text messaging is becoming more popular. Radio remains a notable means of crisis communications – this may be attributed to its maturity and reliability as a means of communication.

Do your emergency preparedness plans, mitigation and recovery strategies include security functions & staff?



■ Yes
■ No
■ Don't know
■ Yes, with additional comments

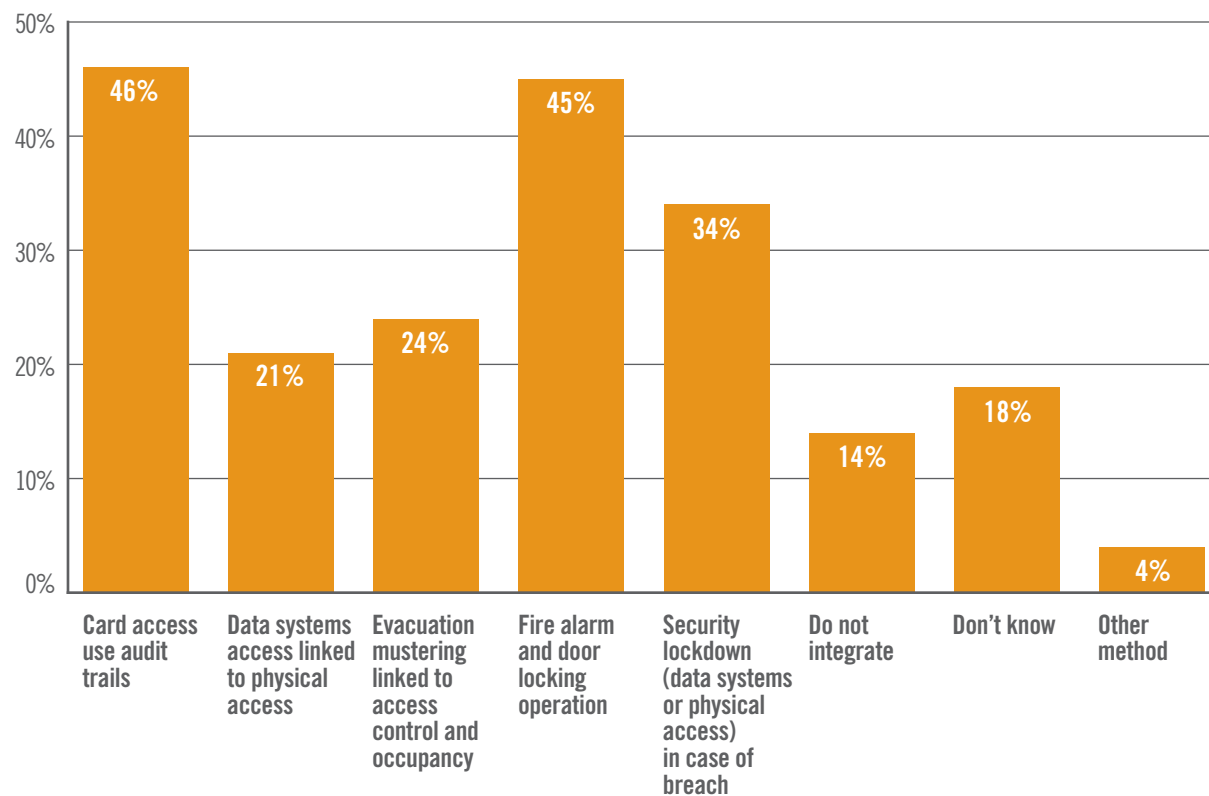
How do you communicate to your security staff during incidents?



Security Plans, Procedures & Solutions

Most respondents indicated that there was some type of integration of facilities management with the security in their organization – most notably card access use audit trails and fire alarm and door locking operation. Security safeguards for physical and data systems breach were also notable and prevalently used.

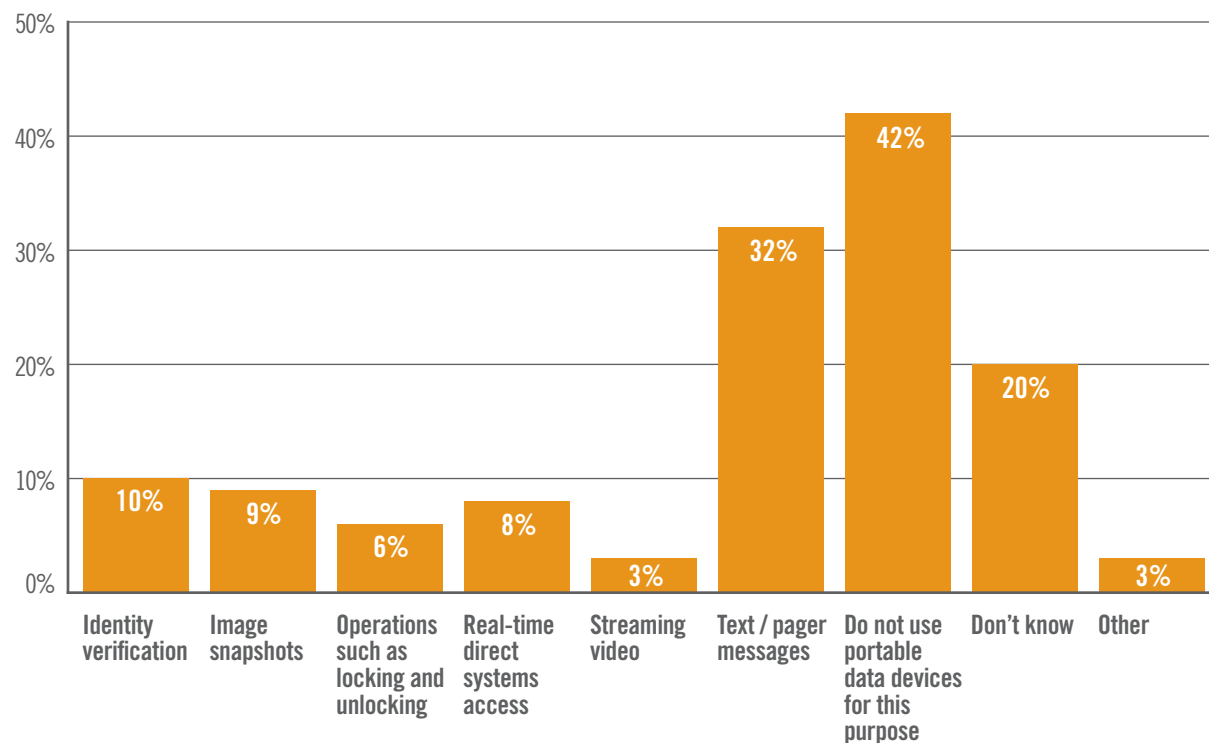
How do you integrate facilities management with security for more effective incident management?



Security Plans, Procedures & Solutions

Portable devices, such as PDAs and smartphones, are emerging tools used for managing security and facilities incidents. More advanced uses of portable devices for incident management, such as identify verification and operational uses, have not been widely adopted among respondent organizations. 42% indicated that they do not use a portable data device at all for this use. However, the use of text messaging and paging is fairly common, with 32% of respondents who use data devices for this purpose.

How do you integrate facilities management with security for more effective incident management?



In Summary: Key Takeaways

2009 showed a few significant changes in the way organizations plan and prepare their crisis communications.

These are our key findings:

Organizational Figures

Despite the economic downturn, the volume of people dedicated to preparedness is relatively unchanged or growing vs. 2008; however, executive involvement in preparedness planning and execution has risen significantly.

Influences on Preparedness Planning & Management

The emergence of H1N1 appears to have influenced planning and management this year. It is the first time since the survey was held that IT and data was not identified as the top preparedness concern.

People Preparedness

Respondents overwhelmingly indicated that their critical communications plans targeted all employees, whereas in prior years it only focused on first responders and executives.

Communications Practices & Tools

Respondents overwhelmingly placed most emphasis on reliability as a primary evaluation point in selecting an emergency notification vendor.

Ease-of-use and implementation are highly valued in a solution compared to 2008, while price actually fell in importance vs. prior years' results.

Security Plans, Procedures & Solutions

Survey respondents overwhelmingly indicated that security related groups played a role in emergency preparedness plans, mitigation and recovery strategies (83%).