

## WHITE PAPER - January 2009

### EXECUTIVE SUMMARY:

A study of emergency preparedness conducted by the Emergency Preparedness Institute (EPI) in 2007 ultimately led to the development of \*The Preparedness Clock™, a graphic indicator of the country's level of preparedness.

As part of our annual preparedness clock update, a review of current survey data was conducted by the Institute.

The 2008 Readiness Quotient Survey (Council for Excellence in Government and American Red Cross) was analyzed as were the following "preparedness indicators," chosen because many of the surveys had these data points in common:

- Percentages of people with disaster supply kits
- Percentages of people unwilling to prepare
- Percentages of businesses without a business continuity plan

More detailed results of these and other criteria can be found in the body of the [White Paper Update 2009](#). From this data, EPI was able to draw certain conclusions regarding the current level of preparedness.

- Interest in preparedness had not changed significantly from 2004 through 2008
- Approximately forty percent (40%) of people still did not have a disaster supply kit, a fairly steady percentage since 2005
- Approximately forty percent (40%) of people had done nothing to prepare, a fairly steady percentage since 2005
- Since surveys did not use a standard set of questions and there was no definition of terminology, it cannot be implied that 60% of the respondents are prepared, since the interpretation of "preparedness" is unclear.
- While it appears that more businesses have a business continuity plan, the extent and quality of the plan is unclear.
- A definitive percentage of people who are prepared cannot be determined since there is no consistent criteria to ascertain preparedness

### Conclusions:

We generally see a decreased level of preparedness based on the overall results of the 2008 Council for Excellence in Government/American Red Cross survey, supplemented by several disparate national and regional studies.

\* [The Preparedness Clock](#) The report will next be reviewed by a national network of emergency managers who will supplement the report, draw conclusions and provide additional survey data that will be used to adjust the time on \*The Preparedness Clock™ for 2009.



## Update – January 2009

In May 2007, the Emergency Preparedness Institute published a White Paper entitled *“Preparedness Needs a New Message – Developing and Promoting an Effective Message to Encourage Businesses, Government Agencies, Their Employees and Families to Prepare for Disasters and Emergencies: Connect the Dots.”*

In that White Paper we compiled and reviewed a set of "preparedness indicators" and summarized our findings.

We then took input from a group of emergency preparedness experts and evaluated the data to draw some conclusions and explore the “next practices” that could advance the effectiveness of emergency management.

The conclusions were integrated with the information across the indices and consolidated into a single index, using a proprietary formula to set the hands on the "Preparedness Clock<sup>™</sup>". The Preparedness Clock<sup>™</sup>, as described in the Executive Summary, was set at approximately 21 minutes past the hour (with 12:00 representing 100% preparedness) and it will be reset one minute for each additional (or decreased) 3% of change in the preparedness of businesses and people according to new surveys that are reporting levels of preparedness.

In the eighteen months since the publication of the original report, there have been numerous disaster events here in this nation and globally which have placed a spotlight once again on preparedness. Additionally, numerous surveys have been conducted to measure the level of preparedness of the American public and businesses, schools, health care facilities and government agencies. Utilizing those surveys and their results, the Institute is updating its 2007 report by preparing a new report for 2009 and, if necessary, resetting the time on the clock.

There are numerous authorities who are still concerned about the increasing “complacency” by the public, both people and businesses, regarding preparedness for a disaster or emergency, a phenomenon many call “creeping complacency”. The Center for Disease Control, the CDC, termed it a “crisis of complacency”.

It is important to point out that a lack of consistency exists in these surveys. The terminology is not defined and there is no consistent understanding of the meaning of the words used in the surveys. Many factors and variables contribute to the answers of the respondents, making it difficult to draw unquestionable conclusions.

Recent surveys, however, seem to support the conclusion that the majority of Americans are still not prepared for a disaster or emergency. Even surveys that state a percentage of Americans feel they are prepared are questioned by authorities who caution that the surveys can be deceptive. A person who purchased several canned goods might consider him/herself prepared. However, the basics of preparedness include developing many aspects of a family plan, evacuation, communication, supply kit for home, car and work, understanding possible hazards, etc. The question is whether respondents understand that.

The original edition of this White Paper presented a Google Trends graph which analyzed through 2006 keyword searches for the word “preparedness” on the top portion and news stories using that word on the bottom portion. That graphic, with the exception of spikes during the 2004 hurricane season and the 2005 Katrina and Rita storms, showed that both media references and volume was fairly steady. The current Google graph, below, (Table 1) which goes through almost eleven months of 2008, shows spikes for Hurricanes Gustav and Ike, but otherwise also remains fairly steady showing no marked increase in interest in preparedness over the last year and a half.

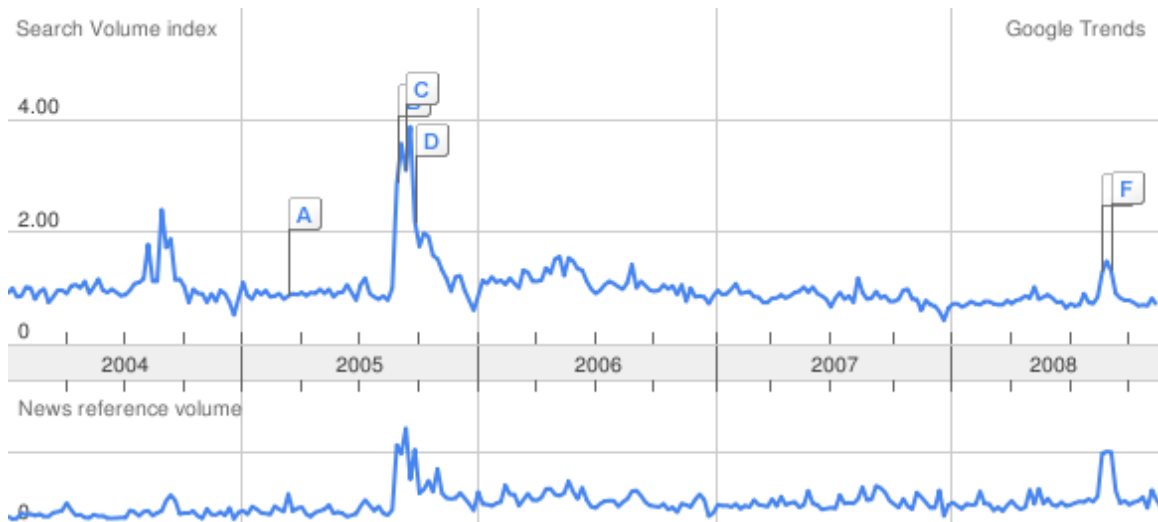


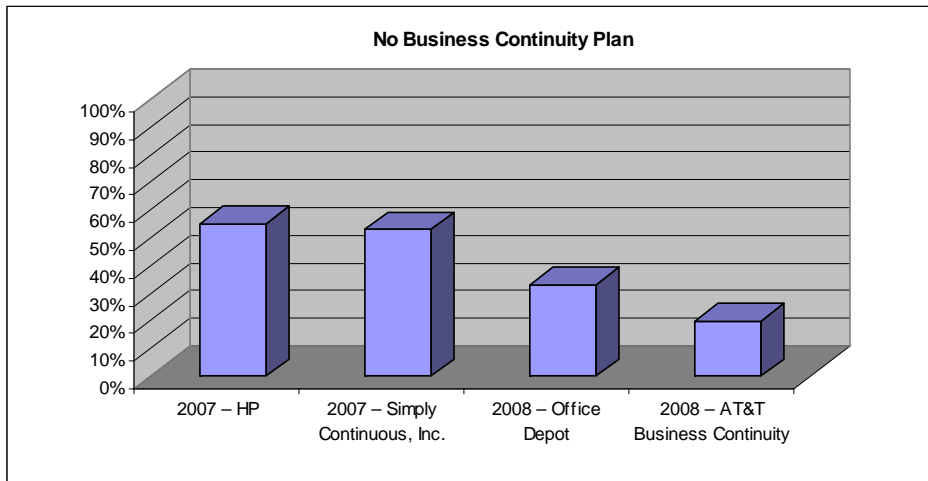
Table 1

In order to confirm that idea, it was necessary to compare the results of the original White Paper surveys with more current surveys. From all of those, it may be possible to draw a conclusion as to the time on the clock.

The 2008 AT&T Business Continuity Study, done in April 2008, found that 30% of U.S. businesses do not consider business continuity planning a priority and one in five businesses does not have a business continuity plan. Only 46% with plans had tested their plans over the past 12 months. This agrees with a North Carolina business survey that noted 20% of businesses do not have a plan and 25% do not consider business continuity planning a priority. A 2006 Hewlett Packard study from the original White Paper that found only 26% tested their plans regularly and a JPMorgan Chase and AFP poll in late 2005 found that only 50% of organizations polled had business continuity plans in place and only 24% of those had tested their plans after Katrina and Rita.

A national survey commissioned by Office Depot in 2008 found that 40% of small businesses were not ready for a disaster and one-third (33%) had no plans to get ready. A study done for Office Depot one year earlier, in 2007, found that 71% of small businesses did not have a plan in place and almost two-thirds (64%) felt they did not need one.

A survey by Simply Continuous, Inc. done in 2007 of companies in the Bay area of California found that 47% of the respondents had a business continuity plan but only 13% said that their companies tested the plan while 40% had no idea about testing. Stratus Technologies’ 2008 survey found that 69% of their respondents had a plan but 20% of those had never tested the plan. CIO/CSO and IDG survey research found 41% of businesses with a plan tested it annually in 2008 versus 36% in 2007, but 16% never tested the plan at all.



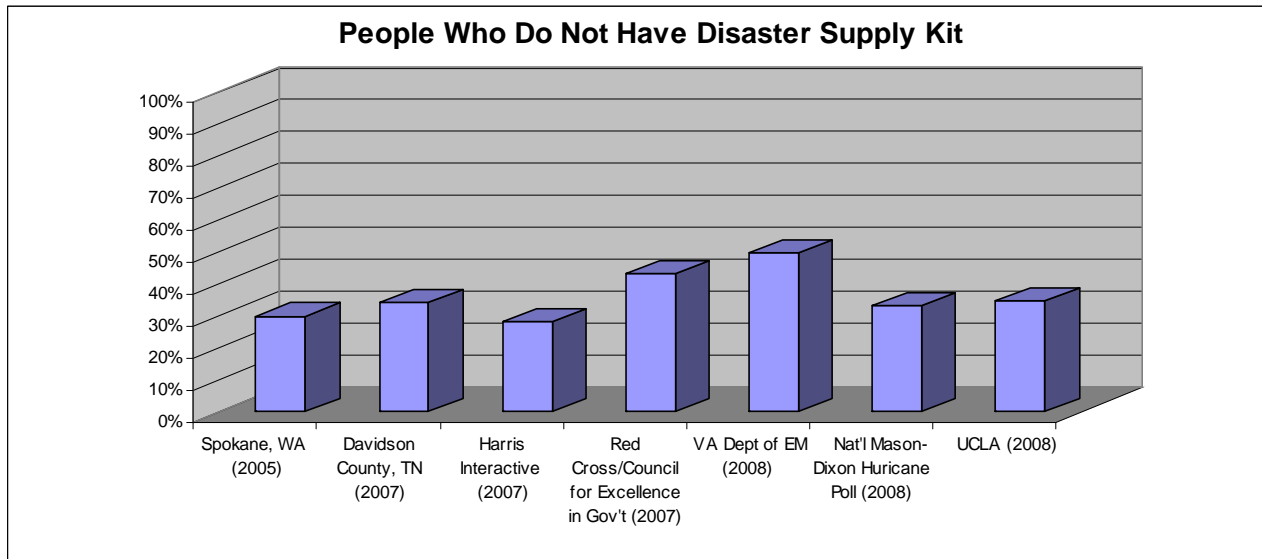
It appears that more businesses, particularly large companies, have some sort of business continuity planning done, but currently at least one-third of all businesses still do not consider such planning a necessity. One might question if any increase is due to general concern by executives over business continuity issues, is it done to please stockholders, or is it due to compliance issues?

It should be noted that there is a lack of consistency in the business surveys. Some focus on IT issues as the definitive concern for planning while others are concerned with the broader aspects of business continuity. This lack of definition and consistency can also be seen in the surveys that measure the preparedness of the American public.

A number of studies examined whether people had a disaster supply kit, although there was no explanation of the contents included. A survey conducted by the American Red Cross and the Council for Excellence in Government in July 2008 found that Americans needed to get more prepared. The survey found a decrease in the collective level of preparedness from 2007. Of the respondents, 36% had a disaster supply kit. A UCLA School of Public Health study in 2008 found that 34.5% of respondents were stockpiling supplies.

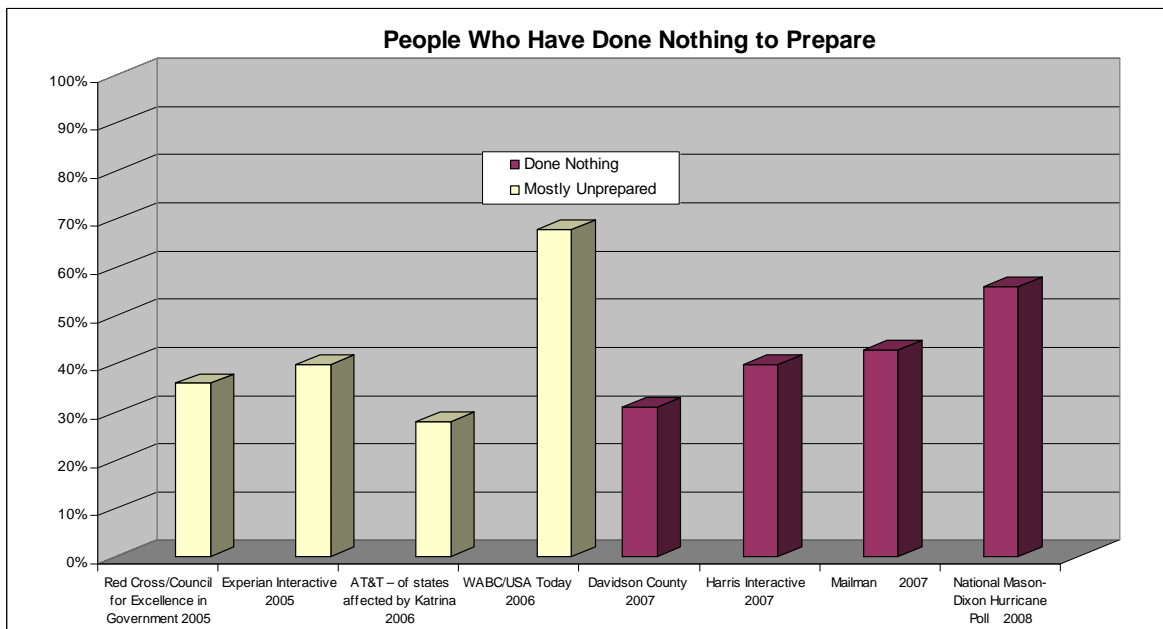
The Virginia Department of Emergency Management survey done in the summer of 2008 found that 43.5% had prepared an emergency supply kit, with 49.5% having no kit at all. The 2008 National Mason-Dixon Hurricane Poll found that 33% had a hurricane survival kit. Twenty percent (20%) of those polled believed that it was the government's responsibility to provide food, water, medicine and shelter in the first few days after a hurricane.

A Harris Interactive Poll conducted in 2007 found that 28% had gathered a disaster supply kit with water, food, medicine, and other items. In 2007 a Nashville/Davidson County, Tennessee survey found that 34% of respondents had a home disaster supply kit. A poll conducted in Spokane, Washington in 2005 found that only 29.8% had a disaster supply kit.

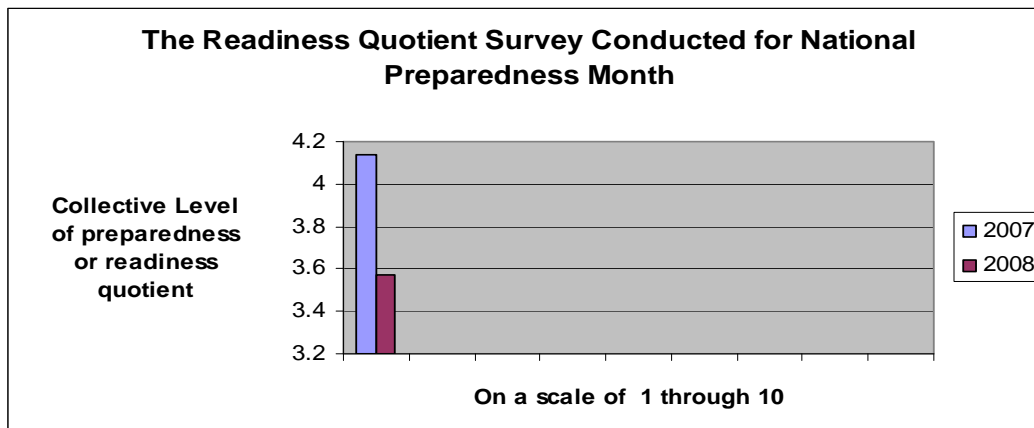


A number of polls also reported the percentages of people who had not done anything at all to prepare family/individual emergency plans. The 2008 National Mason-Dixon Hurricane Poll found that 56% of respondents did not have family disaster plans. A 2007 Harris Interactive poll found 40% were not prepared. In 2007, a survey by the Columbia University Mailman School of Public Health found that 43% were not planning on doing anything about preparing. Similarly, a 2007 Nashville/Davidson County, Tennessee survey noted that 31% of respondents had done nothing to prepare.

In 2006, a WABC/USA Today poll showed that 68% of people responding were unprepared. An AT&T study done in 2006 in the states impacted by Katrina found that even after that event, 28% were unprepared for another natural disaster. In addition, an Experian Interactive study in 2005 found 40% of respondents were not prepared and a Red Cross and the Council for Excellence in Government study done in 2005 reported that 40% were not prepared at all.



In 2008, the Red Cross and the Council for Excellence in Government conducted their Readiness Quotient survey which found, based that on a scale of 1 to 10, the nation's level of preparedness had decreased from 4.14 in 2007 to 3.57 in 2008.



The survey conducted by the American Red Cross and the Council for Excellence in Government in 2008 also found that, of the respondents, only 32% had a family emergency communications plan. An emergency meeting place had only been selected by 27%.

Similarly, a late 2005 report by California-based Experian Interactive found only 15% of respondents were fully prepared for the Big One. A recent poll by the Pasadena Star-News in California questioned residents about their readiness for an earthquake of magnitude 7 or higher. Eighty-three percent (83%) said no. A study was done by the UCLA School of Public Health from April 2007 to February 2008 to measure readiness for a terrorist strike. The researchers conducting the study felt the responses also reflected Californians earthquake readiness and they found that 31% said they had emergency plans in place. Do these polls show an increase or are all these polls suspect because there is no clear explanation of what “emergency plans” encompass?

Conducted in May/June 2008, the Harvard School of Public Health Project on the Public and Biological Security survey showed that only 34% of those affected by Katrina now report they are very prepared, although they worry about not having enough water or not being able to get medical care. Those people not affected by Katrina were most worried about getting gas to evacuate.

Despite the destruction of Katrina, 23% of people living in high-risk areas and affected by Katrina would not evacuate. Of those in a high-risk area but not affected by Katrina, 28% would not evacuate. Seventy-five percent (75%) of those who said they wouldn’t evacuate were sure they would be rescued. Of pet owners, whether affected by Katrina or not, approximately 25% said they didn’t have a place to go to take their pet.

In Louisiana, 47% had not chosen a telephone number outside the area for family members to stay in touch. Fifty-five percent (55%) did not have a meeting place chosen for family members to meet if they were separated. Fifty-three percent (53%) did not know the location of an evacuation shelter in their community.

The Harris Interactive poll conducted in April 2007 found that only 36% of those surveyed had a specific evacuation plan for leaving home in case of an emergency. Fifty-six percent (56%) of pet owners did not have a plan for their pet(s) in case of a disaster.

The Radiological Threat Awareness Coalition survey, conducted in August 2008, found that 63% of those surveyed did not feel prepared in case of a terrorist attack on their community. The Virginia Department of Emergency Management survey done in 2008 found that only 45.8% of respondents had discussed emergency plans with family.

The 2008 National Mason-Dixon Hurricane Poll found that 56% of respondents did not have family disaster plans. Twenty percent (20%) of those polled believed that it was the government's responsibility to provide food, water, medicine and shelter in the first few days after a hurricane.

In a 2008 survey, the National Association of Insurance Commissioners (NAIC) found that 48% of respondents did not have an inventory of their possessions. Of those who did, 32% did not have pictures of those items and 58% did not have receipts. Of those who had inventories, 44% had them at home, not at a remote location.

The Columbia University Mailman School of Public Health, The American Preparedness Project, survey conducted in July 2007 showed a continuing gap between what people perceived as their risk and how prepared they were for a disaster.

While almost half (47%) of the adults believed they would be involved in a natural or manmade disaster during the next few years, most (60%) would wait until a warning of a disaster before becoming prepared. Only one-third (34%) had begun preparations or were prepared. Forty-five percent (45%) said they had a family preparedness plan, up a bit from 35% in 2003. Over one-third (37%) of Americans believed that, if a catastrophic event occurred, help would come to them within one hour. Two-thirds believed help would come within several hours.

The Mailman School's 2008 American Preparedness Project, done in July/August 2008, found that 44% of U.S. residents, fewer than half, said that they had some or all of the items needed for a disaster preparedness plan. Forty-five percent (45%) of parents did not know where their children would be evacuated according to their school's evacuation plan, but nearly 2/3 (63%) of U.S. parents would ignore orders to evacuate and would rush to get their children from school in the event of a disaster. Despite major federal investment in increasing local level disaster preparedness, the issue of children and family unification has not been properly addressed.

The reasons that people don't prepare seem to be unchanged from those that were listed on the original White Paper. This is shown by a survey on emergency preparedness done in July/August 2007 in Nashville/Davidson County, Tennessee. Respondents were questioned regarding the major reasons they were not prepared. Sixty percent (60%) responded that they had not thought enough about it. The next highest group, 14% said that they didn't think an emergency would happen there. The third highest group, 9%, said they didn't want to think about it. Not knowing how to prepare caused 8% not to prepare. Cost was the explanation for 7%, while 4% said it took too much time. Another 4% said nothing would help and 3% said they didn't have room for an emergency kit.

Forty-five percent (45%) of those respondents who were prepared said they did so because they thought it was important to be self-sufficient. Living through a previous emergency convinced 22% to become prepared. Twenty percent (20%) did so because of their children. Five percent (5%) did so because of responsibility for elderly or disabled persons and 3% because of living in a high risk area.

A survey done by Axxcess Points in the fall of 2007 noted a gender gap in attitudes toward disaster preparedness. Thirty-six percent (36%) of males said they were well-prepared for a disaster while only 22% of women stated that. Sixty-two percent (62%) of men said they were either not well prepared or not prepared at all compared to 77% of women who stated they were not well prepared or not prepared at all. Thirty-eight percent (38%) of males said they had a family communications plan, while just 22% of women said they did.

In contrast, the Tennessee survey mentioned above found that more males than females admitted to doing nothing to prepare for disaster. Both surveys illustrate that men and women have different viewpoints about disaster preparedness, but both sexes lack knowledge and are not properly prepared.

Perhaps technology can help. Technological innovations are influencing emergencies and disasters before, during and after crises. Web 2.0 and social media tools are reaching people in important new ways.

E-mail, websites like YouTube, MySpace, Facebook, LinkedIn, Twitter, Ning, etc., blogs, podcasts, and online instant messaging all offer ways to connect with the public. So do the text messages sent to cell phones. Young people use these tools regularly. Emergency management providers are also becoming increasingly familiar with these communication channels.

For example, these channels can reach people and emphasize the importance of preparedness via streaming video. They can supply information during and after a crisis to keep people informed as used during the Virginia Tech school shootings in 2007, Hurricanes Gustav and Ike in 2008, and the 2008 California wildfires.

It is important to capitalize on these new methods of communication to connect with people before, during and after a disaster or emergency. A University of Kansas study, “Untapped Potential: Evaluating State Emergency Management Agency Web Sites 2008”, noted that emergency managers need to recognize the Internet and social media as tools to reach the public. While cost may be an issue for some of these state agencies, many of these tools are no-cost ways to utilize these Internet or cell-based resources. Along with the conventional resources used to communicate with the public, these can provide other ways to accomplish the goal of achieving an informed and prepared citizenry.

Regardless of the method chosen, it is apparent that preparedness may need a new and better message!

The Emergency Preparedness Institute, Inc. is a private corporation of business people primarily from the media and insurance industry providing training, educational programs, information, media interviews and publishing and podcasting interviews with emergency preparedness experts. Its websites are [www.getprepared.org](http://www.getprepared.org), [www.getpreparedtoday.org](http://www.getpreparedtoday.org), [www.WGPNRadio.com](http://www.WGPNRadio.com) and [www.myemspace.com](http://www.myemspace.com).

The Institute has published “When Disaster Strikes Home – 101+ ways to protect your family from unthinkable emergencies.” The Institute can be reached at [info@getprepared.org](mailto:info@getprepared.org) or 877-670-7444