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2001–02

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BUSINESS USE OF INFORMATION TECHNOLOGY

AUSTRALIA

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- For further information about these and related statistics, contact the National Information and Referral Service on 1300 135 070 or Soula Macfarlane on Melbourne 03 9615 7315.

NOTES

INTRODUCTION

This publication presents results from an Australian Bureau of Statistics (ABS) survey of business use of information technology (IT). The survey was conducted in respect of the 2001–02 financial year.

The 2001–02 Business Use of Information Technology survey is the fifth ABS survey on this topic, with the previous collection being conducted in respect of the 2000–01 financial year. The survey has continued to evolve and adapt to changes in the business use of IT. The 2001–02 survey has focused on the extent and use of the Internet and web sites, and continued to measure the ordering of goods and services via the Internet. New to the survey are methods of Internet access by Australian businesses and the exploration of issues related to IT security. Future surveys will be conducted annually and will continue to adapt to changes in business use of IT.

INTERNET INCOME

The concept of Internet income presented in this publication relates to income from all orders for goods and services received via the Internet or web by businesses, with or without online payment. This concept is currently subject to review by the ABS in consultation with other statistical agencies. In addition, many businesses surveyed did not maintain records on the basis of this measure and therefore needed to estimate its value. For these reasons, the estimate of Internet income should be used with caution. Further information can be found in paragraphs 24–28 of the Explanatory Notes.

NUMBER OF BUSINESSES

The estimated number of businesses presented in this publication should be used with some caution and should not be compared with those in previous surveys. These estimates are affected by changes in the ABS Business Register resulting from the introduction of The New Tax System. For further information see paragraphs 6–8 of the Explanatory Notes.

MORE INFORMATION ON ABS IT STATISTICS

Information about ABS activities in the field of IT statistics is available from the Information Technology Statistics theme page on the ABS web site <http://www.abs.gov>. To access the theme page, select 'Themes' from the menu on the home page. Details of other ABS publications relating to the production and use of information technologies in Australia can be found in paragraph 30 of the Explanatory Notes.

COMMENTS

The ABS welcomes comments and suggestions from users regarding future surveys of IT use by businesses. These comments should be addressed to the Director, New Economy Business Statistics Centre, Australian Bureau of Statistics, GPO Box K881, Perth, WA, 6842.

ROUNDING

Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

Susan Linacre
Acting Australian Statistician

CHAPTER 1 MAIN FEATURES

INTRODUCTION

This publication presents final results, in respect of the 2001–02 financial year, from an Australian Bureau of Statistics (ABS) survey on business use of information technology (IT). The 2001–02 survey covers the extent and use of computers, the Internet and web sites by Australian businesses, as well as continuing to measure the ordering of goods and services via the Internet. New to the survey are methods of Internet access by Australian businesses and the exploration of issues related to IT security.

ADOPTION OF INFORMATION TECHNOLOGY (SEE CHAPTER 2)

The adoption of IT by Australian businesses has slowed compared to previous years. Between June 2001 and June 2002 no growth occurred in the proportion of businesses using a computer, with the proportion remaining at 84% of all businesses. Over the same period, growth in the access to the Internet increased slightly by 3 percentage points to 72% and the proportion of businesses with a web presence increased by 2 percentage points to 24%. In contrast, the proportion of businesses with a computer, Internet access and web presence grew by 8, 13 and 6 percentage points respectively in the previous year.

BUSINESS USE OF SELECTED TECHNOLOGIES OVER TIME(a)

		1994	*1998*	*2000*	*2001*	*2002*
Businesses with a computer	%	49	63	76	84	84
Businesses with Internet access	%	na	29	56	69	72
Businesses with a web presence	%	na	6	16	22	24

na not available
(a) Proportions are of all businesses at the end of June.

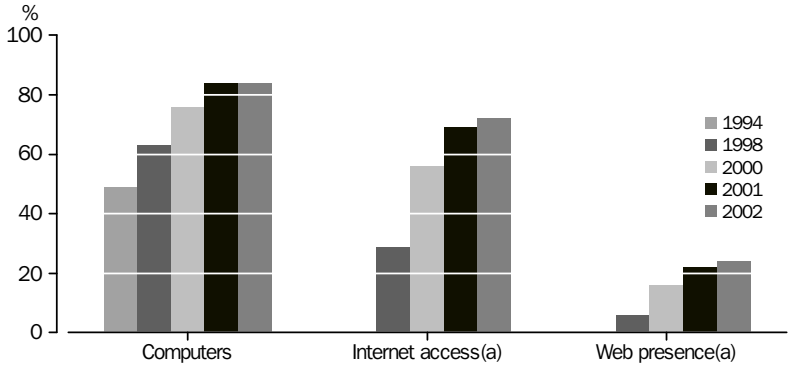
The growth in Internet access and web presence was due to slight increases in the adoption of these technologies by small businesses. The proportion of micro businesses (0–4 persons employed) adopting the Internet increased by one percentage point to 65% since June 2001, while an increase of five percentage points to 80% occurred for businesses employing 5–19 persons. Little or no growth occurred for larger businesses (20 or more persons employed) as the adoption of computers, the Internet and web presence appear to have reached saturation.

The slowing of growth observed in the 2001–02 survey follows periods of rapid growth in the adoption of computers, Internet and web presence by Australian businesses. The use of computers, first measured in 1994, increased by 14 percentage points over the four years to 1998. A greater increase of 21 percentage points was observed in the three years to 2001 as growth in Internet access and web presence increased rapidly.

ADOPTION OF INFORMATION TECHNOLOGY (SEE CHAPTER 2) *continued*

Since first measured in 1998, access to the Internet has grown by 43 percentage points, while web presence has grown by 18 percentage points. The small increases in Internet access and web presence observed between June 2001 and June 2002, follow much higher growth in previous years. Access to the Internet by business increased by 27 percentage points between June 1998 and June 2000 and then by 13 percentage points in the following year to June 2001. The proportion of businesses with a web presence grew by 10 percentage points in the two years between 1998 and 2000 and then by a further six percentage points between 2000 and 2001.

AUSTRALIAN BUSINESSES USING IT



(a) Data not collected for 1993–94 survey.

ORDERS FOR GOODS AND SERVICES VIA THE INTERNET (SEE CHAPTER 3)

The 2001–02 survey measured the number of Australian businesses using the Internet or web to place and/or receive orders, with or without online payment, and the value of Internet or web orders received by businesses (Internet income). As indicated in the Notes at the front of the publication, caution should be used when interpreting values of Internet income. Further information can be found in paragraphs 24–28 of the Explanatory Notes.

The proportion of Australian businesses placing orders via the Internet or web, with or without online payment, continues to increase, while the proportion receiving orders has declined. During 2001–02, 25% of businesses placed orders via the Internet or web, compared to 20% during 2000–01. The proportion of businesses receiving orders for goods and services via the Internet or web was 6% during 2001–02, declining from 9% in 2000–01.

ORDERS FOR GOODS AND SERVICES VIA THE INTERNET OR WEB OVER TIME(a)

		1999–2000	*2000–01*	*2001–02*
Placed orders via the Internet or web	%	r4	20	25
Received orders via the Internet or web	%	6	9	6
Internet income	$b	5.1	9.4	11.3

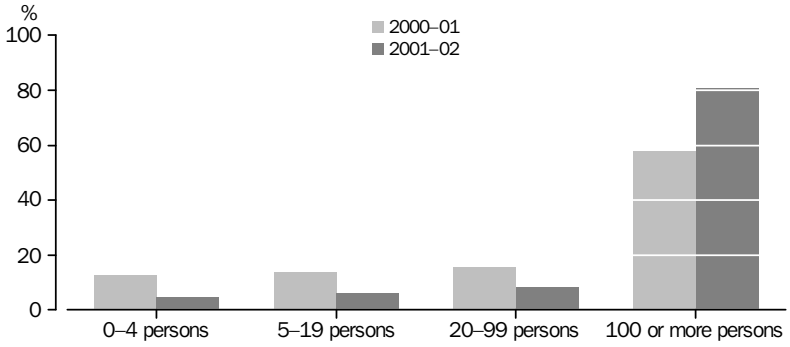
r revised
(a) Proportions are of all businesses.

ORDERS FOR GOODS AND SERVICES VIA THE INTERNET (SEE CHAPTER 3) *continued*

While the number of businesses receiving orders via the Internet decreased, the estimated value of income earned from these orders continued to grow. Internet income earned by Australian businesses increased by $1.9b from $9.4b in 2000–01 to $11.3b in 2001–02. The value of this Internet income represented 0.8% of total business income during 2001–02. This increase compares to an increase of $4.3b between 1999–2000 and 2000–01, when Internet income increased from $5.1b to $9.4b.

Income from orders received via the Internet or web was more concentrated in larger businesses in 2001–02 than during 2000–01, with those businesses employing 100 or more persons earning 81% of the total Internet income in 2001–02, compared with 58% in 2000–01.

DISTRIBUTION OF INTERNET INCOME, By employment size



Notes: Data presented in the graph are not provided in table form due to concerns about the reliability of data. See paragraphs 24–28 of the Explanatory Notes

METHOD OF INTERNET ACCESS (SEE CHAPTER 3)

The method of Internet access used by business has been identified as an area where there is likely to be significant change. In response to this, the 2001–02 survey collected data on the method of Internet access used by Australian businesses.

Businesses were asked to identify all methods of Internet access used, but were not asked to identify those methods for which the level of Internet activity was greatest. Statistics presented in this publication therefore show the extent to which businesses are connected via different methods, but not the degree to which these methods are used.

There was greater variation in methods of Internet access for larger businesses than for smaller businesses. While 46% of large businesses using the Internet (100 or more persons employed) had access via a dial-up modem, other methods of access included: the use of Integrated Services Digital Network (ISDN) (36%), other high speed access (26%), which includes frame relay and Asynchronous Transfer Mode (ATM), and Digital Subscriber Lines (DSL) (20%). In contrast, 88% of micro businesses with Internet access (0–4 persons employed) used dial-up modems, with other forms of access being far less common.

IT SECURITY (SEE CHAPTER 4)

The 2001–02 survey introduced questions relating to IT security. Results are presented on the use of IT security measures by Australian businesses, exposure to IT security incidents or breaches and the impact, source and reporting of incidents or breaches.

IT SECURITY (SEE CHAPTER 4) *continued*

Only 14% of businesses with a computer reported having no IT security measures in place at June 2002, with 86% reporting some form of IT security. The most common form of IT security was anti-virus software or a virus scanner (80%), with other forms of IT security being less prevalent.

Of those businesses using a computer, 59% of businesses indicated that they did not experience a security incident or breach in the previous 12 months, while 41% reported some form of incident or breach. A virus (38%) was the most common IT security incident or breach reported by businesses, followed by a trojan or worm (15%). The level of unauthorised network access was small, with only 2% of businesses with a computer reporting this form of IT security breach.

The ABS is currently testing responses to these security questions as a component of preparation for the 2002–03 survey. The information obtained will assist in understanding business perception of security issues and how that impacts on the reported numbers.

CHAPTER 2 USE OF IT BY AUSTRALIAN BUSINESSES

COMPUTER, INTERNET AND WEB USE

Between June 2001 and June 2002, growth in the adoption of IT by Australian businesses slowed, with the proportion of businesses using a computer remaining at 84%. Over the same period, growth in access to the Internet increased by three percentage points to 72% and the proportion of businesses with a web presence increased by two percentage points to 24%. In contrast, the proportion of businesses using a computer, accessing the Internet and having a web presence, grew by 8, 13 and 6 percentage points respectively in the year to June 2001.

USE OF IT BY BUSINESS SIZE

A strong relationship exists between the employment size of a business and the likelihood that the business is using IT. As employment size increases, so does the proportion of Australian businesses making use of IT. For example, at 30 June 2002 all large businesses (100 or more persons employed) used computers (100%), 99% had access to the Internet, while 81% had a web presence. Micro businesses (0–4 persons employed) had a lower level of IT adoption: 79% used computers, 65% had access to the Internet and only 15% had a web presence.

The growth in Internet access and web presence was due to small increases in the adoption of these technologies by small businesses. The proportion of micro businesses (0–4 persons employed) adopting the Internet increased by one percentage point to 65% in the year to June 2002, while an increase of five percentage points to 80% occurred over the same period for businesses employing 5–19 persons. Little or no growth occurred for larger businesses (20 or more persons employed) as the adoption of computers, the Internet and web presence appear to have reached saturation.

REGIONAL DATA

Use of IT in capital cities was higher than other areas but the differences in computer use, Internet use and web presence continued to be small. The use of computers, access to the Internet and web presence were 85%, 73% and 26% respectively for capital cities, compared to 83%, 69% and 22% respectively for other areas.

The adoption of computers and the Internet by business was similar for New South Wales, Victoria, Queensland, South Australia and Western Australia. These states also showed similar growth in the use of these technologies between June 2001 and June 2002. While the proportion of businesses with a web presence was also similar for these states, varying between 23% for Western Australia and 27% for Queensland, the highest growth for these states was recorded by Queensland, which increased by five percentage points over the period.

Of all states and territories, the adoption of IT by business remained highest in the Australian Capital Territory, with 90% using computers, 83% having access to the Internet and 28% having a web presence. The lowest levels of computer and Internet use were in Tasmania (76% and 64% respectively) while the lowest level of web presence was in the Northern Territory (17%). Changes in the level of computer use, Internet access

REGIONAL DATA *continued*

and web presence between June 2001 and June 2002 in Tasmania and the Northern Territory, can be fully explained by sample variation and should therefore be viewed with caution. Further information on sampling variability and sampling error can be found in the Explanatory Notes, paragraphs 14–18.

INDUSTRY

At the end of June 2002, the proportion of Australian businesses using information technologies varied considerably across industries. The proportion of businesses using computers or with access to the Internet was lowest in the PERSONAL AND OTHER SERVICES INDUSTRY (70% and 53% respectively) and in the ACCOMMODATION, CAFES AND RESTAURANTS INDUSTRY (72% and 57% respectively). Computer and Internet access was highest in the PROPERTY AND BUSINESS SERVICES INDUSTRY (94% and 87% respectively). The highest proportion of businesses with a web presence was in the CULTURAL AND RECREATIONAL SERVICES and the WHOLESALE TRADE INDUSTRIES (both 36%), while the lowest proportion was in the CONSTRUCTION INDUSTRY (9%).

USE OF IT SPECIALIST SERVICES

The use of IT support, either through businesses' own IT specialist staff or through external IT services, increases with business size. Over half (54%) of those businesses employing 100 or more persons used both their own IT specialist staff and external IT services, 32% used external services only and 7% employed their own IT specialist staff only. In contrast, 2% of micro businesses (0–4 persons employed) used both their own IT specialist staff and external IT services, 19% used external services only and 3% used their own IT specialist staff only.

Comparisons with data from previous surveys related to IT specialist employment are not recommended for small businesses. These data may have been overstated due to a tendency for businesses to identify non-IT staff as IT specialists. More information can be found in the Explanatory Notes, paragraph 22.

2.1 BUSINESS USE OF SELECTED TECHNOLOGIES(a)

		BUSINESSES WITH		
	Number of businesses(b)	*Computer*	*Internet access*	*Web presence*
	'000	%	%	%
Employment size				
0–4 persons	408	79	65	15
5–19 persons	201	91	80	34
20–99 persons	45	98	93	55
100 or more persons	6	100	99	81
Total income				
Less than $100,000	156	75	60	11
$100,000–$999,999	382	84	71	22
$1m–$4.9m	95	96	88	45
$5m or more	27	100	96	69
Industry				
Mining	2	89	81	30
Manufacturing	55	81	71	29
Electricity, gas and water supply	—	np	np	np
Construction	92	81	63	9
Wholesale trade	46	90	79	36
Retail trade	114	78	63	25
Accommodation, cafes and restaurants	34	72	57	31
Transport and storage	32	81	66	23
Communication services	5	83	64	22
Finance and insurance	26	90	84	25
Property and business services	150	94	87	30
Health and community services	55	89	72	15
Cultural and recreational services	19	87	80	36
Personal and other services	31	70	53	23
State				
New South Wales	236	83	71	24
Victoria	172	84	71	24
Queensland	116	86	73	27
South Australia	44	84	73	25
Western Australia	65	87	73	23
Tasmania	12	76	64	19
Northern Territory	4	80	73	*17
Australian Capital Territory	11	90	83	28
Region				
Capital cities	445	85	73	26
Other areas	215	83	69	22
Total	**661**	**84**	**72**	**24**

— nil or rounded to zero (including null cells)

np not available for publication but included in totals where applicable, unless otherwise indicated

* estimate has a relative standard error of between 25% and 50% and should be used with caution

(a) Proportions are of all businesses in each category.

(b) Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

2.2 USE OF IT SPECIALIST SERVICES(a)(b)

		BUSINESSES USING		
Employment size	*Number of businesses*(c) '000	*Their own IT specialist staff only* %	*External IT services only* %	*Both their own IT specialist staff and external IT services* %
0–4 persons	408	3	19	2
5–19 persons	201	5	40	6
20–99 persons	45	7	49	18
100 or more persons	6	7	32	54
Total	**661**	**4**	**27**	**5**

(a) Proportions are of all businesses in each category.

(b) Data may be overstated for businesses with small employment due to a tendency to identify non-IT staff as IT specialists. Therefore readers are cautioned against making comparisons with previous survey estimates in the 1999–2000 and 2000–01 surveys. See Explanatory Notes, paragraph 22.

(c) Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

CHAPTER 3 INTERNET ACTIVITIES AND WEB FUNCTIONS

INTERNET ACTIVITIES

Despite only a small increase in the proportion of Australian businesses using the Internet, the nature of the activity has changed. While use of the Internet for email remained the most common activity for businesses with Internet access (94%), the proportion accessing banking and financial services increased from 59% during 2000–01 to 69% during 2001–02. There was also an increase in the use of the Internet for information searches by those businesses with Internet access, increasing from 80% to 88% over the period.

ORDERS FOR GOODS AND SERVICES VIA THE INTERNET

The proportion of businesses ordering goods and services over the Internet has increased, with 35% of businesses with Internet access (25% of all Australian businesses) undertaking this activity during 2001–02, compared to 29% in the previous year. In contrast, fewer businesses received orders for goods and services, however more income was generated from this activity. During 2001–02, only 9% of businesses with Internet access undertook this activity (6% of all Australian businesses), down from 13% in 2000–01.

Of those businesses placing orders via the Internet, nearly three-quarters also made payments online for ordered goods and services (26% of businesses with Internet access). In contrast, less than one-third of businesses receiving orders for goods and services (3% of businesses with Internet access) also received payments online.

The estimated value of income earned by businesses from the sale of goods and services ordered via the Internet for the year ending 30 June 2002 was $11.3b. This represented approximately 0.8% of the total income for the same period in the industries surveyed. There are both conceptual and measurement issues which mean that the estimate of income for orders placed over the Internet or web should be treated with caution. Further information can be found in paragraphs 24–28 of the Explanatory Notes.

INTERNET INCOME OVER TIME

	Internet income
	$b
1999–2000	5.1
2000–01	9.4
2001–02	11.3

ORDERS FOR GOODS AND SERVICES VIA THE INTERNET *continued*

Of the 42,000 businesses estimated to be receiving income from orders via the Internet in 2001–02, 33% generated less than 1% of their total income in this manner. Internet income represents a higher proportion of total income for more micro businesses (0–4 persons employed) receiving orders via the Internet than for larger businesses. For example, 81% of these micro businesses generated 1% or more of their total income via the Internet, compared with 48% of businesses employing more than 100 persons.

METHOD OF INTERNET ACCESS

In the 2001–02 survey, businesses were asked to identify methods of Internet access used by the business. Businesses were not asked to identify those methods for which the level of Internet activity was greatest. Statistics presented in the publication therefore show the extent to which businesses are connected via different methods, but not the degree to which these methods are used.

The most common method of Internet access by Australian businesses was dial-up via modem with 86% of businesses utilising this method. Less common was the use of Digital Subscriber Line (DSL) (7%), cable modem (7%) and Integrated Services Digital Network (ISDN) (4%). Only a very small percentage of businesses had access to the Internet via a wireless connection (1%).

There was greater variation in methods of access for larger businesses than for smaller businesses. While 46% of large businesses (100 or more persons employed) had access to the Internet via a dial-up modem, other methods of access included: the use of ISDN (36%), other high speed access (26%), which includes frame relay and ATM (Asynchronous Transfer Mode), and Digital Subscriber Lines (20%). In contrast, 88% of micro businesses with Internet access (0–4 persons employed) used dial-up modems, with other forms of access being far less common.

Access to the Internet using DSL and ISDN both increase with employment size, with a large jump in the use of DSL between those businesses employing 0–4 persons and those employing 5–19 persons (4% and 11% respectively). There is also a large jump in the use of ISDN between those businesses employing 5–19 persons and those employing 20–99 persons (4% and 16% respectively).

WEB FUNCTIONS

While the number of businesses selling via the Internet has decreased, those businesses undertaking selling via the web are becoming more sophisticated. More businesses with a web presence offered online ordering (16%), shopping cart facilities (5%), online payment capabilities (9%) and the capability for secure access or transactions (7%). In particular, the number of businesses offering online payment increased from 8,000 to 14,000 businesses between June 2001 and June 2002, and the capability for secure access or transactions increased from 7,000 to 11,000 businesses.

The integration of web technology with back end systems continued to be rare among businesses with a web presence (6%), but has increased from 3% since June 2001. Similar increases occurred over the same period for the proportion of businesses with a personalised page for repeat customers (2% to 5%), account information (4% to 6%), and the facility to track orders (2% to 4%).

3.1 SELECTED BUSINESS INTERNET ACTIVITIES, Businesses with Internet access(a) ..

		EMPLOYMENT SIZE				
		0–4 persons	*5–19 persons*	*20–99 persons*	*100 or more persons*	*Total*
Selling related activities(b)(c)						
Received orders for goods and services	%	7	11	11	17	9
Received online payments(d)	%	2	3	5	6	3
Purchasing related activites						
Placed orders for goods and services	%	31	38	45	57	35
Made online payments(d)	%	24	27	31	32	26
Government services						
Accessing government services	%	52	58	76	87	57
Electronic lodgement of						
Taxation forms	%	np	np	np	np	np
Claims for grants or benefits	%	2	3	6	11	3
Applications for licences or permits	%	7	9	15	15	9
Payments	%	15	15	16	19	15
Sought information or services relating to						
Taxation	%	32	36	58	71	36
Employment	%	19	27	46	46	24
Regulations	%	25	31	49	65	30
General activities						
Email	%	93	94	96	98	94
Information searches	%	86	89	92	98	88
Banking and financial services	%	65	74	78	79	69
Businesses with Internet access(e)	'000	**266**	**160**	**42**	**6**	**474**

np not available for publication but included in totals where applicable, unless otherwise indicated

(a) Proportions are of businesses with Internet access in each employment category.

(b) The 2001–02 survey includes a reduced set of selling and purchasing related activities.

(c) Estimates related to receiving orders for goods and services via the Internet or web should be used with caution. See Explanatory Notes paragraphs 24–28.

(d) Includes online payments for goods and services via the Internet or web. Excludes online payments for goods and services not ordered via the Internet or web.

(e) Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

3.2 ORDERING OF GOODS AND SERVICES VIA THE INTERNET, All businesses(a)(b) ...

		BUSINESSES UNDERTAKING ACTIVITY DURING 2001–02			BUSINESSES UNDERTAKING ACTIVITY DURING 2000–01	
	Number of businesses at June 2002(c)(d)	*Placed orders via the Internet or web*	*Received orders via the Internet or web*	*Number of businesses at end June 2001*(c)(d)	*Placed orders via the Internet or web*	*Received orders via the Internet or web*
	'000	%	%	'000	%	%
Employment size						
0–4 persons	408	20	5	457	17	7
5–19 persons	201	30	8	196	22	11
20–99 persons	45	42	10	39	37	18
100 or more persons	6	57	17	6	49	24
Total income						
Less than $100,000	156	17	5	195	15	5
$100,000–$999,999	382	23	6	386	19	8
$1m–$4.9m	95	37	9	91	29	15
$5m or more	27	50	14	26	38	21
Industry						
Mining	2	28	*2	2	22	3
Manufacturing	55	26	8	58	22	14
Electricity, gas and water supply	—	np	np	—	35	*5
Construction	92	12	3	100	9	3
Wholesale trade	46	33	11	48	24	16
Retail trade	114	18	7	119	13	8
Accommodation, cafes and restaurants	34	16	10	35	11	12
Transport and storage	32	22	11	34	15	11
Communication services	5	23	9	5	21	10
Finance and insurance	26	34	*3	26	27	8
Property and business services	150	39	7	164	33	10
Health and community services	55	23	**1	55	21	2
Cultural and recreational services	19	26	9	20	23	11
Personal and other services	31	17	4	32	13	6
State/territory						
New South Wales	236	28	7	251	22	9
Victoria	172	21	6	182	19	7
Queensland	116	24	6	125	19	9
South Australia	44	25	7	49	17	9
Western Australia	65	22	7	65	18	11
Tasmania	12	25	*5	12	14	*8
Northern Territory	4	28	**2	4	*22	**7
Australian Capital Territory	11	40	*5	10	31	*13
Region						
Capital cities	445	26	7	476	22	9
Other areas	215	23	6	222	16	7
Total	**661**	**25**	**6**	**698**	**20**	**9**

* estimate has a relative standard error of between 25% and 50% and should be used with caution

— nil or rounded to zero (including null cells)

np not available for publication but included in totals where applicable, unless otherwise indicated

** estimate has a relative standard error greater than 50% and is considered too unreliable for general use

(a) Proportions are of all businesses in each category.

(b) Estimates related to receiving orders for goods and services via the Internet or Web should be used with caution. See Explanatory Notes, paragraphs 24–28.

(c) Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

(d) Estimates for the 2001–02 survey include a smaller number of non-employing businesses than in the 2000–01 survey. See Explanatory Notes, paragraphs 6–8.

3.3 BUSINESSES EARNING INCOME VIA THE INTERNET(a)(b)(c)

		INTERNET INCOME AS A PERCENTAGE OF TOTAL INCOME			
Employment size	*Number of businesses* '000	*Less than 1%* %	*1% to less than 5%* %	*5% to less than 50%* %	*50% or more* %
0–4 persons	20	19	26	48	*7
5–19 persons	17	47	36	17	—
20–99 persons	5	40	38	*21	**1
100 or more persons	1	52	25	21	2
Total	**42**	**33**	**31**	**32**	***4**

* estimate has a relative standard error of between 25% and 50% and should be used with caution

— nil or rounded to zero (including null cells)

** estimate has a relative standard error greater than 50% and is considered too unreliable for general use

(a) Proportions are of businesses earning income via the Internet or Web in each employment size category.

(b) Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

(c) Estimates related to Internet income should be used with caution. See Explanatory Notes, paragraphs 24–28.

3.4 METHOD OF INTERNET ACCESS(a)(b)

		EMPLOYMENT SIZE				
		0–4 persons	*5–19 persons*	*20–99 persons*	*100 or more persons*	*Total*
Dial-up via modem	%	88	88	74	46	86
Cable modem	%	8	5	*5	7	7
ISDN (Integrated Services Digital Network)	%	2	4	16	36	4
Digital Subscriber Line, e.g. ADSL	%	4	11	14	20	7
Wireless connection	%	*1	*1	*3	4	1
Other high speed access	%	*1	*1	*5	26	1
Don't know	%	1	*1	*1	*1	1
Businesses with Internet access(c)	'000	**266**	**160**	**42**	**6**	**474**

* estimate has a relative standard error of between 25% and 50% and should be used with caution

(a) Proportions are of businesses with Internet access in each category.

(b) Businesses could identify more than one method of Internet access.

(c) Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

3.5 SELECTED BUSINESS WEB FUNCTIONS(a)(b)

	BUSINESSES AT END JUNE			
	2001		*2002*	
	'000	%	'000	%
Online ordering	21	14	26	16
Shopping cart facilities	5	4	8	5
Online payment capabilities(c)	8	5	14	9
Capability for secure access or transactions	7	5	11	7
Account information	6	4	10	6
Facility to track orders	2	2	6	4
Personalised page for repeat customers	3	2	8	5
Integration with back end systems	5	3	9	6
Businesses with a web presence(d)	**153**	**. .**	**161**	**. .**

(a) Proportions are of businesses with a web presence.

(b) Businesses could identify more than one function.

(c) Online payment capabilities for orders which may or may not have been made via the Internet or web.

(d) Estimates for the 2001–02 survey include a smaller number of non-employing businesses than in the 2000–01 survey. See Explanatory Notes, paragraphs 6–8.

CHAPTER 4 IT SECURITY

INTRODUCTION

Statistics presented in this publication on IT security are based on values reported by businesses. In some cases a business may not be aware of a security incident or breach or the presence of an IT security measure. Survey results may therefore understate the actual levels of IT security measures, incidents or breaches.

IT SECURITY MEASURES

Only 14% of businesses with a computer reported having no IT security measures in place at June 2002, with 86% reporting some form of IT security. The most common form of IT security reported was anti-virus software or a virus scanner (80%). The next most common form of IT security was physical security (34%), followed by authentication software or hardware (22%) and firewall (19%).

While nearly all large businesses (100 or more persons employed) with a computer reported some form of IT security (99%), 16% of micro businesses (0–4 persons employed) reported having no IT security measures. For all forms of IT security surveyed, a strong relationship existed between the employment size of the business and the likelihood that the business reported the security measure, with security measures more common in larger businesses.

SECURITY INCIDENTS OR BREACHES

Of those businesses using a computer, 59% reported that they did not experience a security incident or breach during 2001–02, while 41% reported experiencing some form of breach or incident. A virus was the most common IT security incident or breach reported by businesses using a computer (38%), followed by a trojan or worm (15%). The level of unauthorised network access was small, with only 2% of businesses reporting this form of IT security breach.

A strong relationship exists between the employment size of a business and the likelihood that the business reported experiencing an IT security incident or breach. For example, only 28% of large businesses (100 or more persons employed) using a computer reported no security incident or breach during 2001–02. In contrast, 63% of micro businesses (0–4 persons employed) using a computer were without a security incident or breach in the same period.

IMPACT, SOURCE AND REPORTING OF IT SECURITY INCIDENTS OR BREACHES

Of those businesses reporting a security incident or breach, 46% experienced a downtime of service, 37% experienced corruption of hardware or software and 27% had corruption or loss of data. Web site defacement was not common, with only 2% of businesses reporting this impact.

IMPACT, SOURCE AND REPORTING OF IT SECURITY INCIDENTS OR BREACHES *continued*

Businesses identified the source of security incidents or breaches in most cases as external rather than internal to the business. Of those businesses which experienced security incidents or breaches, 80% reported that they had experienced incidents/breaches which were generated externally, 5% had experienced incidents/breaches sourced internally, while 18% reported experiencing incidents/breaches with an unknown source.

Businesses more commonly reported IT security incidents or breaches within their own business (53%) and/or to an IT supplier or contractor (26%), but rarely reported them to external authorities (1%). Of those businesses which experienced a security incident or breach, 29% indicated that incidents or breaches were not reported to other persons or organisations.

4.1 IT SECURITY INCIDENTS OR BREACHES AND MEASURES(a)(b)

		EMPLOYMENT SIZE				
		0–4 persons	*5–19 persons*	*20–99 persons*	*100 or more persons*	*Total*
Security incidents or breaches						
Virus	%	34	41	55	68	38
Trojan or worm	%	13	17	27	35	15
Unauthorised network access	%	2	2	*4	*8	2
No security incident or breach	%	63	56	41	28	59
IT security measures						
Physical security	%	26	39	62	88	34
Anti-virus software or virus scanner	%	78	83	89	99	80
Firewall	%	15	20	36	73	19
Authentication software or hardware	%	17	25	39	69	22
Intrusion detection system	%	5	6	11	30	6
Network sniffer software	%	2	2	6	20	2
Written IT security policy	%	2	4	15	45	4
No IT security measures	%	16	12	5	**1	14
Disaster recovery plan	%	4	8	15	43	7
Number of businesses with a computer(c)	'000	**323**	**183**	**44**	**6**	**557**

* estimate has a relative standard error of between 25% and 50% and should be used with caution

** estimate has a relative standard error greater than 50% and is considered too unreliable for general use

(a) Proportions are of all businesses with a computer in each employment category.

(b) Businesses could identify more than one incident or breach or security measure.

(c) Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

4.2 IMPACT, SOURCE AND REPORTING OF IT SECURITY INCIDENTS OR BREACHES(a)(b)

		EMPLOYMENT SIZE				
		0–4 persons	*5–19 persons*	*20–99 persons*	*100 or more persons*	*Total*
Impact of IT security incidents or breaches						
Corruption of hardware or software	%	36	39	39	30	37
Corruption or loss of data	%	26	30	27	22	27
Downtime of service	%	42	51	47	52	46
Web site defacement	%	*2	2	*1	**5	2
No impact	%	38	30	38	33	35
Source of IT security incidents or breaches						
Internal	%	4	5	8	18	5
External	%	78	82	83	85	80
Don't know source	%	21	16	13	8	18
Reporting of IT security incidents or breaches						
Within the business	%	47	55	69	79	53
Parent or related company	%	3	6	5	14	4
IT supplier or contractor	%	18	33	41	29	26
External authority	%	*1	*1	—	*2	*1
None reported	%	37	22	12	5	29
Number of businesses with a computer which experienced security incidents or breaches(c)	'000	**120**	**80**	**26**	**4**	**230**

* estimate has a relative standard error of between 25% and 50% and should be used with caution

** estimate has a relative standard error greater than 50% and is considered too unreliable for general use

— nil or rounded to zero (including null cells)

(a) Proportions are of all businesses with a computer which experienced security incidents or breaches in each employment category.

(b) Businesses could identify more than one impact, source or reporting authority.

(c) Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

EXPLANATORY NOTES

INTRODUCTION

1 This publication presents results from the 2001–02 Business Use of Information Technology survey. The survey collected data on Australian business use of computers and the Internet, including web sites and home pages. It explored the use and functionality of Internet and web technologies by businesses, and continued to measure the ordering of goods and services via the Internet. For the first time, the survey also collected data on the method of Internet access utilised by business and explored issues related to information technology (IT) security.

PREVIOUS SURVEYS

2 Business Technology surveys were previously conducted by the ABS with respect to the 1993–94, 1997–98, 1999–2000 and 2000–01 financial years.

- The 1993–94 survey collected data about IT specialist staff and expenses and the prevalence of computers.
- The 1997–98 survey collected data about IT specialist staff and expenses but concentrated more on the use of the Internet by business. Data on benefits of, and barriers to, Internet access were also collected.
- The 1999–2000 and 2000–01 surveys collected data on IT specialist staff, Internet activities and services used, and web presence functions and activities. Data on the value of orders for goods and services received via the Internet were also collected.

SURVEY SCOPE AND METHODOLOGY

3 All employing businesses in Australia were included in the scope of the survey, with the exception of businesses in:

SISCA 3000 General Government
SISCA 6000 Rest of the world
ANZSIC Division A Agriculture, Forestry and Fishing
ANZSIC Division M Government Administration and Defence
ANZSIC Subdivision 84 Education
ANZSIC Subdivision 97 Private Households Employing Staff
ANZSIC 9610 Religious Organisations

4 A stratified random sample of approximately 12,800 businesses was drawn from the ABS Business Register. All manufacturing businesses with 500 or more employees were included in the sample. For other industries, all businesses with 200 or more employees were included. After some sample loss due to ceased businesses, a response rate of 92% was achieved. Data from respondents were weighted to represent the surveyed population. Whilst the scope of the survey was employing businesses, it is likely that a small number of non-employers were included.

STATISTICAL UNIT

5 The business unit used in the survey was the management unit. The management unit is the highest type of unit within a business or organisation which controls its productive activities, and for which accounts are kept. A management unit is created for all the operations within an industry subdivision (and the unit will be classified to the relevant subdivision of the Australian and New Zealand Standard Industrial Classification). Where a business cannot supply adequate data for each industry subdivision, a management unit will be formed which contains activity in more than one industry subdivision.

COVERAGE

6 The frame used for the Business Use of Information Technology survey, like most ABS economic surveys, was taken from the ABS Business Register. The ABS Business Register is primarily based on registrations to the Australian Taxation Office's Pay As You Go Withholding (PAYGW) scheme (and prior to 1 July 2000, the Group Employer (GE) scheme). The frame is updated quarterly to take account of new businesses and businesses which have ceased employing.

7 Businesses which have ceased employing are identified when the Australian Taxation Office cancels their PAYGW registration (or previously their GE registration). In addition, from July 1999 to the end of June 2000, businesses which did not remit under the GE scheme for the previous five quarters were removed from the frame. A similar process has recently been adopted to remove businesses which do not remit under the PAYGW scheme. Since five quarters of information relating to remittance under the PAYGW scheme is required to remove a business, this information was not available for the 2000–01 survey frame but was available for the 2001–02 survey frame. As a consequence, estimates for the 2000–01 Business Technology survey included a higher level of non-employing businesses than in the 2001–02 survey and a corresponding decline in the estimated number of businesses has occurred between 2000–01 and 2001–02.

8 The introduction of The New Tax System has a number of significant implications for ABS business statistics, and these are discussed in the information papers *ABS Statistics and The New Tax System* (cat. no. 1358.0) and *Improvements in ABS Economic Statistics [Arising from The New Tax System]* (cat. no. 1372.0).

IMPROVEMENTS TO COVERAGE

9 Data in this publication have been adjusted to allow for lags in processing new businesses to the ABS Business Register, and the omission of some businesses from the register. The majority of businesses affected, and to which the adjustments apply, are small in size.

10 Adjustments have been made to include new businesses in the estimates in the periods in which they commenced operations, rather than when they were processed to the ABS Business Register. Adjustments of this type will continue to be applied in future periods.

11 For more information on these adjustments, please refer to the ABS publication *Information Paper: Improvements to ABS Economic Statistics, 1997* (cat. no. 1357.0).

CLASSIFICATION BY INDUSTRY

12 This publication presents statistics classified according to the 1993 edition of the *Australian and New Zealand Standard Industrial Classification (ANZSIC)* (cat. no. 1292.0). Each management unit has been classified to a single industry on the basis of its main income earning activity, irrespective of whether the unit also generates income from related or unrelated secondary activities.

RELIABILITY OF DATA

13 When interpreting the results of a survey it is important to take into account factors that may affect the reliability of estimates. Such factors can be classified as either sampling or non-sampling error.

14 The estimates presented in this publication are based on information obtained from a sample of businesses in the surveyed population. Consequently, the estimates are subject to sampling variability, that is, they may differ from the figures that would have been obtained if all units had been included in the survey. One measure of the likely difference is given by the standard error (SE), which indicates the extent to which an estimate might have varied by chance because only a sample of units was included.

RELIABILITY OF DATA *continued*

15 There are about 2 chances in 3 that a sample estimate will differ by less than one SE from the figure that would have been obtained if a census had been conducted, and approximately 19 chances in 20 that the difference will be less than two SEs.

16 Sampling variability can also be measured by the relative standard error (RSE) which is obtained by expressing the SE as a percentage of the estimate to which it refers. The RSE is a useful measure in that it provides an immediate indication of the percentage standard errors likely to have occurred due to sampling, and avoids the need to refer also to the size of the estimate. RSEs on the Australian level aggregates presented in this publication are as follows:

- proportion of businesses using computers, 1%
- proportion of businesses with access to the Internet, 1%
- proportion of businesses with a web presence, 3%

17 As an example of the above, the estimated percentage of businesses with a web presence is 24% and the RSE is 3%, giving a standard error of 1 percentage point (3% of 24%). Therefore, there would be 2 chances in 3 that, if all units had been included in the survey, a figure in the range of 23% to 25% would have been obtained, and 19 chances in 20 (i.e. a confidence interval of 95%) that the figure would have been within the range of 22% to 26%. For more information about RSEs for estimates presented in this publication, please telephone the contact shown on the front page.

18 The sampling variability for estimates at the state/territory or industry level is higher than that for Australian level aggregates. Within states/territories, the sampling variability, and therefore the RSEs of estimates for Tasmania, Northern Territory and the Australian Capital Territory are higher than for other states. Survey estimates for these states should therefore be viewed with more caution than those for other states.

19 Errors other than those due to sampling may occur in any type of collection and are referred to as non-sampling error. For this survey, non-sampling error may result from such things as deficiencies in the register of businesses from which the sample was drawn, non-response, imperfections in reporting and/or errors made in compiling results. The extent to which non-sampling error affects the results of the survey is not precisely quantifiable, but its impacts can be broadly identified. Every effort was made to minimise non-sampling error by careful design and testing of the questionnaire, efficient operating procedures and systems and the use of appropriate methodology. Survey estimates subject to a high level of non-sampling error have been suppressed or provided with relevant cautions.

20 Where figures have been rounded, discrepancies may occur between the sum of the components and the total. In addition, percentages have been calculated using the unrounded figures.

HISTORICAL COMPARISONS

21 Comparisons of data with previous surveys are possible for most data presented in the publication. In some instances, comparisons are not recommended due to changes in survey methodology.

22 It is not recommended that 2001–02 survey estimates related to IT specialist employment be compared with data from previous years. Estimates related to IT specialist employment are subject to non-sampling error due to a tendency for businesses with small employment to identify non-IT staff as IT specialists. Survey estimates for 2001–02 are subject to lower non-sampling error than those from the 2000–01 and 1999–2000 surveys due to more intensive examination of responses and discussion with small business.

HISTORICAL COMPARISONS *continued*

23 It is not recommended that 2001–02 survey estimates related to making and receiving online payments be compared with data from previous years. Improvements to questionnaire design in the 2001–02 survey have meant that making and receiving online payments are directly related to the ordering of goods and services via the Internet. Data published in the 1999–2000 and 2000–01 surveys are not directly related to goods and services ordered via the Internet as they include Internet bill payments for orders which may not have originated via the Internet.

ORDERS FOR GOODS AND SERVICES VIA THE INTERNET AND INTERNET INCOME

24 The concept of Internet income presented in this publication relates to income from all orders for goods and services received via the Internet or web by businesses, with or without online payment. Like previous surveys, the 2001–02 Business Use of Information Technology survey has highlighted issues which affect the quality and interpretation of estimates of Internet income and the proportion of businesses receiving orders for goods and services via the Internet or web. Readers should consider these issues when using these estimates.

25 As in previous surveys, many businesses surveyed in the 2001–02 survey did not maintain records on the basis of the Internet income measure described in paragraph 24 and therefore needed to estimate its value. For many large businesses, the estimation of Internet income was difficult and in some instances responses were inconsistent with those of previous surveys. While the ABS has reduced this error through analysis of responses and consultation with businesses, this form of error cannot be completely eliminated.

26 The ABS uses the Organisation for Economic Co-operation and Development (OECD) definition of an Internet commerce transaction and therefore measures the income resulting from Internet orders for goods and services, and the number of businesses selling their products this way. An important element of the definition is that payment and the ultimate delivery of the good or service is not relevant, that is, either or both may be conducted offline. Recent ABS experience in collecting Internet income has highlighted the difficulty of defining an Internet commerce transaction in a way which is understood by businesses and suits all forms of Internet commerce. For instance, for some businesses, the Internet transaction initiates and completes the purchase, while for others the Internet transaction finalises details of a purchase which was initiated by a non-Internet based agreement or contract. In order to maximise consistency of reporting in the 2001–02 survey, businesses were asked to include Internet income received via the Internet for orders for goods and services, irrespective of whether the initial agreement was conducted via the Internet.

27 Some orders for goods and services are initiated over the Internet and are then subject to ongoing payments. Ongoing payments may occur over a long period of time and via non-Internet based media. For consistency in compiling the income measure and to ensure that it covers all income flowing from the initial order over the Internet, the ABS would ideally like to include ongoing payments via the Internet, but recognises that most businesses are unable to track these payments. Survey estimates for the 2001–02 survey and previous collections may be understated due to this measurement issue.

ORDERS FOR GOODS AND SERVICES VIA THE INTERNET AND INTERNET INCOME *continued*

28 The ABS contributes to international fora on indicators for Internet income and has aligned its definition and practices with international standards where they exist. The design of the 2002–03 Business Technology survey will consider developments in this area and investigate improvements to questionnaire design and collection methodology in order to improve the quality and useability of survey estimates related to Internet income and ordering of goods and services via the Internet.

ACKNOWLEDGMENT

29 ABS publications draw extensively on information provided freely by individuals, businesses, governments and other organisations. Their continued cooperation is very much appreciated; without it, the wide range of statistics published by the ABS would not be available. Information received by the ABS is treated in strict confidence as required by the *Census and Statistics Act 1905*.

RELATED PUBLICATIONS

30 The most recent issue of other ABS publications on the use and production of information technology and telecommunication goods and services in Australia are listed below:

Government Use of Information Technology, Australia, 1999–2000, cat. no. 8119.0
Household Use of Information Technology, Australia, 2000, cat. no. 8146.0
Information Technology, Australia, 2000–01, cat. no. 8126.0
Internet Activity, Australia, March 2002, cat. no. 8153.0
Use of Information Technology on Farms, Australia, June 2000, cat. no. 8150.0
Use of the Internet by Householders, Australia, November 2000, cat. no. 8147.0

DATA AVAILABLE ON REQUEST

31 Data on the benefits of receiving or placing orders for goods and services via the Internet or Web were collected in the 2001–02 survey but not presented in this publication. Inquiries about these statistics and more detailed statistics than those presented in this publication should be made by telephoning the contact shown on the front page.

ABBREVIATIONS

$b	billion (thousand million) dollars
$m	million dollars
ABS	Australian Bureau of Statistics
ADSL	asymmetric digital subscriber line
ANZSIC	Australian and New Zealand Standard Industrial Classification
ATM	asynchronous transfer mode
DSL	digital subscriber line
GE	group employer
ISDN	integrated service digital network
IT	information technology
OECD	Organisation for Economic Co-operation and Development
PAYGW	pay-as-you-go withholding
RSE	relative standard error
SDSL	symmetric digital subscriber line
SE	standard error
SISCA	Standard Institutional Sector Classification of Australia

GLOSSARY

Asynchronous Transfer Mode (ATM)	A technology based on the transmission of data in short cells or packets which allows for the transfer of video, audio and computer data over the same network.
Authentication software or hardware	A system which verifies the identity of a user, user device, or other entity, to allow access only to eligible users, devices or other entities.
Back end systems	Existing accounting, stock control and ordering computer systems previously used to manage non-Internet aspects of a business.
Computer	Includes personal computers, laptops, notebooks, mainframes and mini-computers.
Denial of service	Any action which deliberately floods an information system to the extent that it becomes 'jammed' and the service is subsequently unavailable for its intended purpose.
Digital Subscriber Line (DSL)	Communication technologies designed to increase bandwidth available over the standard copper telephone network (e.g. Asymmetric DSL or ADSL and Symmetric DSL or SDSL).
Email	Electronic mail is a facility which allows network users to exchange messages locally and worldwide (including text and file attachments).
External IT services	When a business pays any other business or person (outside of their own business) to provide specialist IT services (e.g. contractors or consultants) these type of specialist IT services are referred to as external IT services.
Extranet	A private network that uses the Internet to securely share part of a business's information or operations with suppliers, vendors, partners, customers or other businesses.
Firewall	A system or combination of systems that enforces a boundary between two or more networks, limiting and monitoring access.
Information technology (IT)	Refers to the services and technologies which enable information to be accessed, stored, processed, transformed, manipulated and disseminated using computers or computer networks.
Integrated Services Digital Network (ISDN)	ISDN sends data via a digital phone line to national and international destinations and can be used for high speed Internet access.
Internet	A world-wide collection of computers which are linked together to form a repository of stored information and to provide a range of communication services. These services include, but are not limited to, the World Wide Web (WWW), email and extranet.
Intrusion detection system	Any system which attempts to detect intrusion into a computer or network by observation of actions, security logs, or audit data.
IT specialist staff	Refers to all employees and working proprietors and partners who are predominantly engaged in IT work. Excluded are staff predominantly engaged in production, sales and data entry. Also excluded are contractors or consultants for whom PAYGW tax is not deducted.
Network sniffer software	A program used to monitor network traffic.

Online payments Payments made via the Internet or a web site for goods and services. These payments generally require customers to provide their credit/debit card details online. Includes real time online payments.

Secure access/transactions A web site has a capability for secure access or transactions when it allows customers to submit orders for goods, requests for services and credit/debit card details over a secure link that cannot be accessed by unauthorised persons. Secure Sockets Layer is a common protocol used in this type of web site as it enables encryption of data such as credit card details and customer information sent over the Internet.

Trojan A computer program containing an apparent or actual useful function that contains additional (hidden) functions that allow unauthorised collection, falsification or destruction of data.

Virus A self-replicating, malicious program that attaches itself to an application or other executable system component.

Web presence Web presence includes a web site, home page or a presence on another entity's web site. A web site or home page is an electronic document that is accessed via a unique address on the World Wide Web. The document provides information in a textual, graphical or multimedia format.

Web site defacement This occurs when an unauthorised person deliberately alters, removes or adds to the contents of a web site.

Worm An independent program that replicates from machine to machine across network connections, often clogging networks and information systems as it spreads.

FOR MORE INFORMATION . . .

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