(Confidential)

MIC   Communications Usage Trend Survey in 2004 —
Households

* This survey conforms with the requirements of the Statistical Reports Coordination Law. You may rest assured that your responses on this questionnaire will be used solely for the purpose of statistical analysis, so please feel free to give your full and frank opinions.

1 In this survey, we will be asking about the use of information and communications equipment and services by yourself (i.e., the person named on the sticker) and your household in your normal daily lives.

2 The Glossary on the back page of this booklet provides definitions of the terms used in the questionnaire.

3 Your answers should be correct as of the survey date, December 31, 2004.

4 Completed questionnaires should be sent to: 〒
         (Contact)
                    Tel:

5 This survey is being conducted by the market research company stated above under commission from the Ministry of Internal Affairs and Communications.

(affix name label here)

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Entire household — Questions concerning the entire household are directed at the head of household

Q1. Ownership and usage of information and telecommunications devices

(1) **Do you own any of the devices listed in (1) through (14) below?**

Do you own any of the following devices in your household? **Enter the number of each device owned.** If none are owned, write in "0".

1. Do not include any devices which you have not used **once in the past year**, or which have been purchased with funds from your workplace.
2. A device which can use both cell phone and PHS services should be entered as two separate devices (cell phone and PHS).

Device	Number	Device	Number	Device	Number
1) Cell phone (other than (2) and (3))		6) Mobile data terminal (PDA)		11) ETC on-board system	
2) Internet compatible cell phone (other than (3))		7) Computer		12) Internet compatible television	
3) 3rd-generation (3G) cell phone*		8) Internet compatible fixed line telephone		13) Internet compatible TV game console	
4) PHS (other than (5))		9) Fax machine		14) Other electronic device capable of accessing the internet	
5) Internet compatible PHS		10) Car navigation system			

* Digital cell phones designed to IMT-2000 standards and supporting high-speed data transmission. Examples include the NTT DoCoMo FOMA, the au CDMA 1X and CDMA 1X WIN, and the Vodafone 700 series and above.

(2) **For households with two or more PCs**
Are the PCs connected via a wired or wireless system (a household LAN)?
Please circle the number of the appropriate response.

| 1. Connected via wire LAN | 2. Connected via wireless LAN | 3. Not connected |

(3) Does your household **use an IP telephone? Circle one response only.**

1. Yes	3. No, and we don't plan to
2. Not at present, but we plan to get one	

(4) For respondents who answered Yes in (3) above
How much has the IP telephone reduced your overall telephone charges?
Circle one response only.

1. By around 10%	3. By around 30%	5. Hasn't reduced
2. By around 20%	4. By more than 30%	6. Don't know

(5) **If your household uses an IP telephone or you are planning to install one, have you experienced any problems with usage? If your household does not use an IP telephone, why not?**
Circle all that apply.

1. Charges are not that much cheaper	6. Don't understand services and/or procedures
2. Connection procedure and settings too complex	7. Don't need
3. Poor sound quality	8. Haven't heard of IP telephone
4. Have to have a dedicated IP telephone number	9. Other
5. Cannot call emergency services	10. No problems

Q2. Internet usage

(1) **Has anyone in your household (excluding persons five years old and younger) used the Internet (to view websites, send/receive e-mail) in the past year? Please circle the number of the appropriate response.**

* Includes internet usage from cell phones, PHS devices, mobile data terminals and game devices as well as computers.
* Limited to private usage of the internet. Includes internet usage both within and outside the home.
* Includes internet usage on devices not owned by the household, for example in public libraries and internet cafes.

1. Yes	2. No, nobody

(2) This question is for households where the internet is used via a computer in the home.

What type of connection do you use to access the internet at home from your computer?
Please circle all responses that apply.

– Narrowband line		
1. Dial-up (telephone line)	3. ISDN — always on	5. PHS*
2. ISDN — dial up	4. Cell phone (other than 10)*	
– Broadband		
6. Cable television connection	8. Wireless (e.g. FWA)	10. 3G cell phone*
7. FTTH (optic fiber)	9. DSL	
– Other		
11. Other		

* Only where used to connect a computer to the internet. Does not refer to internet usage directly from these devices.

(3)   This question is for respondents who use broadband to access the internet at home (options 6 - 10 in Question 2).

Why did you decide to install broadband at home? Please circle all that apply.

1. Lower initial installation costs and/or usage charges	5 Easier to see/hear/download music and video content
2. Fixed monthly fee means I don't have to worry about usage charges, making it cheaper overall	6 Faster transfers of large video and music files
3. Constant connection means I don't have to dial up every time	7 Can be used as IP telephone to reduce telephone charges
4. Easier to search for and obtain information	8 Other

(4)   This question is for respondents who do not use broadband to access the internet at home (none of options 6 - 10 in Question 2).

Why have you not installed broadband at home? Please circle all that apply.

1. Too expensive	5. Don't use internet much at home
2. Too time-consuming to get line installed	6. Current line serves our purposes
3. No broadband services in our area	7. Don't understand the procedures involved
4. Broadband services can't be installed in our home for technical reasons	8. Other

(5)   This question is for households using a computer at home to access the internet.

1) **Do you plan to change your computer internet connection at any stage? Circle one of the following.**

1. Yes	3. No
2. Maybe	4. Don't know

2) This question is for respondents who answered Yes to 1) above.

Which types of computer internet connection are you considering? Circle all that apply.

– Narrowband line
1. Dial-up (telephone line)	3. ISDN — always on	5. PHS*
2. ISDN — dial up	4. Cell phone (other than 10)*	

– Broadband
6. Cable television connection	8. Wireless (e.g. FWA)	10. 3G cell phone*
7. FTTH (optic fiber)	9. DSL	

– Other
11. Other

* Only where used to connect a computer to the internet. Does not refer to internet usage directly from these devices.

Q3. Cable Television and Satellite Broadcasting

(1) In your household, which of the following types of television broadcasting services do you **watch**, and **how do you access them**?
Circle one response in each category as appropriate.

Type of broadcast		Viewing at home	Access
1) Cable television (CATV)		1. Yes 2. No	
2) BS analog		1. Yes 　├─ 1-a. NHK only 　├─ 1-b. Subscription programming (WOWOW) only 　└─ 1-c. Both NHK and subscription programming 2. No	1. Cable television 2. Own antenna 3. Shared antenna for apartment building
Digital broadcasting	3) BS digital	1. Yes 　├─ 1-a. NHK and free programming only 　├─ 1-b. Subscription programming (WOWOW and Star Channel) only 　└─ 1-c. NHK and free and subscription programming 2. No	1. Cable television 2. Own antenna 3. Shared antenna for apartment building
	4) CS digital (CS/110° CS)	1. Yes 2. No	1. Cable television 2. Own antenna 3. Shared antenna
	5) Terrestrial digital	1. Yes 2. No	1. Cable television 2. Own antenna 3. Shared antenna

(2) Does your household have a digital broadcasting receiver? Irrespective of whether you actually watch digital broadcasts, **how many of each of the following types of receivers do you have (including rental units)**?
Write the number in each box. Also **indicate the number of receivers that can also be used to receive terrestrial digital broadcasts**.
Write '0' where you do not have a receiver.

Receiver type	Number	Also receives terrestrial
1. Digital broadcast tuner built into television		
2. External digital broadcast tuner		
3. Digital broadcast tuner built into recording device (VCR, DVD recorder, hard disk recorder)		
4. Digital broadcast tuner in computer		
5. CATV unit compatible with digital broadcasts (home terminal or set-top box)		

(3) The box below contains six statements about digital terrestrial broadcasting. **Which of these are you aware of? Circle all that apply.**

1. Launched in Japan's three largest cities in 2003
2. To be expanded into other areas from 2006
3. Current analog broadcasting to be phased out by 2011
4. Analog broadcasting will still be available for the time being after the introduction of digital broadcasting
5. Need a digital television or special tuner to view digital broadcasts
6. Terrestrial digital broadcasting is/is not available in our area at present

(4) This question is for respondents who circled one or more of the responses in (3) above.
How did you learn about terrestrial broadcasting? **Circle all that apply.**

1. Newspapers/magazines
2. Television
3. Posters, pamphlets, etc.
4. MIC home page
5. Events and exhibitions
6. Local government publications
7. Point of sale (electrical retailers)
8. Other

(5) Thinking of the features and functions of terrestrial digital broadcasting, which ones are you **interested in**? **Circle all that apply.**

> 1. Superior audio and video quality (such as high-vision broadcasts)
> 2. Program features for elderly and disabled persons, such as subtitles, commentary and voice speed regulation
> 3. Up-to-the-minute information via enhanced data broadcasting
> 4. Program searching using on-screen guides
> 5. Interactive functions for participating in quiz shows or requesting drama programs and movies
> 6. Server broadcasts providing new services such as program 'digests' and viewing on demand
> 7. Consistent quality reception on car navigation systems and mobile terminals such as cell phones
> 8. Internet functionality such as TV shopping and internet banking
> 9. Disaster prevention news from local authorities and bookings at public facilities
> 10. None

(6) This question is for respondents who said they do not watch terrestrial digital broadcasts in Question (1) earlier. Why do you not watch digital terrestrial broadcasts? **Circle all that apply.**

> 1. Not yet available in our area
> 2. Antenna or other equipment not compatible
> 3. Don't have the required receiver
> 4. Don't know whether it's available or not in our area
> 5. Don't have to convert until 2011
> 6. Happy with analog broadcasts

(7) **How much** would you pay for a digital television set? **Circle one response only.**

> 1. More than ¥500,000
> 2. Up to ¥500,000
> 3. Up to ¥300,000
> 4. Up to ¥200,000
> 5. Up to ¥100,000
> 6. Up to ¥50,000
> 7. Would not buy one
> 8. Already have one

Q4. About your household

(1) **How many people** are there in your household? **Write the number in the box**.

(2) How much is **your combined household income? (for yourself and other family members in the previous year, before tax) Circle one response only.**

> 1. Less than ¥2 million
> 2. ¥2 million - less than ¥4 million
> 3. ¥4 million - less than ¥6 million
> 4. ¥6 million - less than ¥8 million
> 5. ¥8 million - less than ¥10 million
> 6. ¥10 million - less than ¥15 million
> 7. ¥15 million - less than ¥20 million
> 8. ¥20 million or more

(3) Which of the following best describes your household residence? **Circle one response only.**

> 1. Freestanding house
> 2. Apartment building (up to 3 years old)
> 3. Apartment building (3 or more years old)
> 4. Other

For all household members -- These questions are directed to each member of the household

* The following questions apply to all household members aged six and over. For young students or others who have difficulty with writing, another household member should fill in the answers.
* If the household has nine or more persons aged six and over, please contact us so that we may send you more survey forms.

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Indicate the age and gender of each household member aged six and over.	A (head of household)	B	C	D	E	F	G	H
Gender (circle)	M / F	M / F	M / F	M / F	M / F	M / F	M / F	M / F
Age (in years)								

Answer separately for each household member

↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓

Question 1 is for all household members.

Q1 Which of the following have you used in the past year?
Circle all that apply

	A	B	C	D	E	F	G	H
1. Cell phone (other than 2 or 3 below)	1	1	1	1	1	1	1	1
2. Internet compatible cell phone (other than 3 below)	2	2	2	2	2	2	2	2
3. 3G cell phone*	3	3	3	3	3	3	3	3
4. PHS (other than 5 below)	4	4	4	4	4	4	4	4
5. Internet compatible PHS	5	5	5	5	5	5	5	5
6. Mobile information terminal (PDA)	6	6	6	6	6	6	6	6
7. Computer	7	7	7	7	7	7	7	7
8. None of the above	8	8	8	8	8	8	8	8

* Digital cell phone designed to IMT-2000 standards and supporting high-speed data transmission. Examples include the NTT DoCoMo FOMA, the au CDMA 1X and CDMA 1X WIN, and the Vodafone 700 series and above.

Q2 (1) In the past year, have you used the internet (for example, to view websites or send and receive emails)?
Circle one response only.

	A	B	C	D	E	F	G	H
1. Yes	1	1	1	1	1	1	1	1
2. No	2	2	2	2	2	2	2	2

* Includes internet usage from cell phones, PHS devices, mobile data terminals and game devices as well as computers.
* Includes internet usage for work as well as personal usage.

If you answered No to Question 2 (1) above, skip to Question 7. Questions 2 through 6 are for respondents who answered Yes to Question 2 (1) above.

(2) This question is for respondents who answered Yes to Q2 (1) above.
How often do you access the internet, irrespective of location?
Circle one response in each category — Computer and Cell Phone.

	A Computer	A Cell phone	B Computer	B Cell phone	C Computer	C Cell phone	D Computer	D Cell phone	E Computer	E Cell phone	F Computer	F Cell phone	G Computer	G Cell phone	H Computer	H Cell phone
1. At least once a day	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. At least once a week (but not every day)	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
3. At least once a month (but not every week)	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
4. Less often (but at least once a year)	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4

(3) This question is for respondents who answered Yes in Q2 (1) above.

Which of the following devices have you used to access the internet over the past year?

Circle all that apply

	A	B	C	D	E	F	G	H
1. Computer	1	1	1	1	1	1	1	1
2. Internet compatible cell phone or PHS	2	2	2	2	2	2	2	2
3. Internet compatible mobile information terminal	3	3	3	3	3	3	3	3
4. Internet compatible television	4	4	4	4	4	4	4	4
5. Internet compatible fixed line telephone	5	5	5	5	5	5	5	5
6. Internet compatible game device or other appliance	6	6	6	6	6	6	6	6

(4) This question is for respondents who answered Computer in Q3 above.

Where did you use a computer to access the internet?

Circle all that apply

1. Home	1	1	1	1	1	1	1	1
2. School	2	2	2	2	2	2	2	2
3. Workplace	3	3	3	3	3	3	3	3
4. Public facility (government offices, library, community center)	4	4	4	4	4	4	4	4
5. Airport or railway station	5	5	5	5	5	5	5	5
6. In transit on public transport	6	6	6	6	6	6	6	6
7. Restaurant, café or similar (other than 8 below)	7	7	7	7	7	7	7	7
8. Internet café	8	8	8	8	8	8	8	8
9. Hotel or other accommodation facility	9	9	9	9	9	9	9	9
10. Other	10	10	10	10	10	10	10	10

* "School" includes internet usage during class time at elementary, secondary and senior school level, as well as university and graduate school.

* "Workplace" includes internet usage while working from home, and teachers using the internet at school.

(5) This question is for respondents who answered Home in Q4 above.

When using the internet on your computer at home, how long on average do you spend connected to the internet each time? And how long on average do you spend on the internet per week?

Circle one response in each category (per use and per week)

1) Average time per use

1. Less than 10 minutes	1	1	1	1	1	1	1	1
2. 10 to 30 minutes	2	2	2	2	2	2	2	2
3. 30 minutes to 1 hour	3	3	3	3	3	3	3	3
4. 1 to 2 hours	4	4	4	4	4	4	4	4
5. More than 2 hours	5	5	5	5	5	5	5	5

2) Average time per week

1. Less than 1 hour	1	1	1	1	1	1	1	1
2. 1 to 3 hours	2	2	2	2	2	2	2	2
3. 3 to 5 hours	3	3	3	3	3	3	3	3
4. 5 to 10 hours	4	4	4	4	4	4	4	4
5. 10 to 20 hours	5	5	5	5	5	5	5	5
6. More than 20 hours	6	6	6	6	6	6	6	6

* Do not include time where the computer is connected to the internet but you are not actually making use of the internet.

(6) This question is for respondents who answered Home in Q4 above.

Do you use a broadband connection* to access the internet from your computer at home?

Circle one response only

1. Yes	1	1	1	1	1	1	1	1
2.No	2	2	2	2	2	2	2	2

* Here, a broadband connection is defined as cable television, FTTH (optic fiber), wireless (such as FWA), DSL, or 3G cell phone connection at 144 kbps or above.

(7)	This question is for respondents who answered "Internet compatible cell phone or PHS" in (3) above. How much do you use your internet compatible cell phone or PHS for voice calls, and how much do you use it for the internet (including viewing websites and sending and receiving emails)? Circle one response only	A	B	C	D	E	F	G	H
	1. Use for internet only	1	1	1	1	1	1	1	1
	2. Use 7 - 9 times out of 10 for the internet	2	2	2	2	2	2	2	2
	3. Use 4 - 6 times out of 10 for the internet	3	3	3	3	3	3	3	3
	4. Use 1 - 3 times out of 10 for the internet	4	4	4	4	4	4	4	4
	5. Use for voice calls only	5	5	5	5	5	5	5	5

(8)	This question is for respondents who answered "Internet compatible cell phone or PHS" in (3) above. Do you use fixed-price packet services? Circle one response only								
	1. Yes	1	1	1	1	1	1	1	1
	2. No, but I would like to in future	2	2	2	2	2	2	2	2
	3. No, and I have no intention to	3	3	3	3	3	3	3	3

Q3 (1)	Question 3 is for all respondents who use the internet. Have you ever made use of a public wireless LAN internet connection service at a hotel, restaurant, retail facility, airport, railway station or similar? Circle one response only	A	B	C	D	E	F	G	H
	1. Yes	1	1	1	1	1	1	1	1
	2. No	2	2	2	2	2	2	2	2

(2)	This question is for respondents who answered Yes to (1) above. Where have you used a public wireless LAN internet connection service? Circle all that apply								
	1. Public facility such as airport or railway station	1	1	1	1	1	1	1	1
	2. Restaurant or café	2	2	2	2	2	2	2	2
	3. Hotel or other accommodation	3	3	3	3	3	3	3	3
	4. Retail outlet other than 2 or 3 above	4	4	4	4	4	4	4	4
	5. Other	5	5	5	5	5	5	5	5

(3)	This question is for respondents who answered Yes to (1) above. How often do you make use of a public wireless LAN internet connection service? Circle one response only								
	1. Almost every day	1	1	1	1	1	1	1	1
	2. At least once a week	2	2	2	2	2	2	2	2
	3. At least once a month	3	3	3	3	3	3	3	3
	4. Less often	4	4	4	4	4	4	4	4

Q4 (1)

Question 4 is for all respondents who use the internet. Over the past year, what have you used the internet for?

Circle all that apply, in each category (Computer and Cell Phone)

	A		B		C		D		E		F		G		H	
	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone
1. Purchasing* products and services (excluding internet auctions)	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. Searching for information on products and services	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
3. Email	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
4. Creating websites	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
5. Weblogs ("blogs")	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
6. Bulletin boards and chat rooms	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
7. Social networking services	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7
8. Mail magazines	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8
9. Job searching	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9
10 . Quizzes, contests, questionnaires	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
11. News, weather, restaurant information	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11
12. Government information services	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12
13. Government applications and notifications	13	13	13	13	13	13	13	13	13	13	13	13	13	13	13	13
14. Online courses (e-learning)	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14
15. Online games	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15
16. Internet banking - for banking services	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16
17. Internet banking - for investment services	17	17	17	17	17	17	17	17	17	17	17	17	17	17	17	17
18. Internet auctions	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18
19. Downloading/viewing videos	19	19	19	19	19	19	19	19	19	19	19	19	19	19	19	19
20. Downloading images (including wallpaper)	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20
21. Downloading/listening to music (including ring tones)	21	21	21	21	21	21	21	21	21	21	21	21	21	21	21	21
22. File sharing using P2P programs	22	22	22	22	22	22	22	22	22	22	22	22	22	22	22	22

* Purchasing where payment is involved

(2)

This question is for respondents who answered "Purchasing products and services" in (1) above.

What types of goods and/or services have you bought over the internet? Circle all that apply in each category (Computer and Cell Phone)

	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone
1. Computer goods (software, peripheral devices, computers, etc)	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. Books, magazines, CDs, DVDs (excluding content received in digital form)	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
3. Clothing, shoes, accessories, jewellery	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
4. Food, drink, alcohol	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
5. Household items, appliances, furniture	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
6. Toys, games, musical instruments, sporting goods, stationery and other hobby items	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
7. Gifts (including seasonal and Christmas gifts)	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7
8. Tickets and reservations for transport, concerts, theater performances, restaurants and hotels	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8
9. Travel applications (including package tours) and travel-related goods	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9
10. Financial products including stocks, insurance and mutual funds	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
11. Automobile	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11
12. Beauty, health and medical equipment	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12
13. Other	13	13	13	13	13	13	13	13	13	13	13	13	13	13	13	13

(3) This question is for respondents who answered "Purchasing products and services" in (1) above.

How much in total have you spent on purchases of products and services through the internet over the past year? (including consumption tax)? Circle one response in each category (Computer and Cell Phone)

	A		B		C		D		E		F		G		H	
	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone
1. Less than ¥10,000	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. ¥10,001 - ¥30,000	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
3. ¥30,001 - ¥50,000	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
4. ¥50,001 - ¥100,000	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
5. ¥100,001 - ¥200,000	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
6. ¥200,001 - ¥500,000	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
7. ¥500,001 - ¥1,000,000	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7
8. Over ¥1,000,000	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8

(4) This question is for respondents who answered "Purchasing goods and services" in (1) above.
How did you pay for products and services purchased through the internet? Circle all that apply in each category (Computer and Cell Phone)

	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone
1. Credit card	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. Electronic money	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
3. Net banking	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
4. Postal transfer or bank procedure (excluding net banking)	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
5. Payment at convenience store	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
6. COD	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
7. Payment via ISP or telephone service provider	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7
8. Other	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8

(5) This question is for respondents who did not answer "Purchasing goods and services" in (1) above.
Why have you not purchased products or services through the internet? Circle all that apply

1. Don't need to/not interested	1	1	1	1	1	1	1	1
2. Want to see a product before I buy it	2	2	2	2	2	2	2	2
3. Don't like giving out credit card details	3	3	3	3	3	3	3	3
4. Don't like giving out personal details	4	4	4	4	4	4	4	4
5. Worried about delivery of goods and/or returning goods	5	5	5	5	5	5	5	5
6. Products or services I want are not available	6	6	6	6	6	6	6	6
7. Purchase procedure too complex	7	7	7	7	7	7	7	7
8. Other	8	8	8	8	8	8	8	8

Q5 (1) Question 5 is for all respondents who use the internet.
In the past year, have you used the internet to purchase digital content?* Circle one response in each category (Computer and Cell Phone)

	A		B		C		D		E		F		G		H	
	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone
1. Yes	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. No	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2

* Defined here as video, still image, audio and/or text information distributed over a network.

(2) This question is for respondents who answered Yes to (1) above.
What form(s) of content have you purchased?
Circle all that apply in each category (Computer and Cell Phone)

	A		B		C		D		E		F		G		H	
	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone
1. Software	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. Music	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
3. Video	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
4. News, weather forecasts	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
5. Subscription mail magazines	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
6. Electronic books	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
7. Games	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7
8. Ring tones	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8
9. Wallpaper	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9
10. Other	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10

(3) This question is for respondents who answered Yes to (1) above.
How much in total have you spent on purchasing digital content through the internet over the past year?
Circle one response in each category (Computer and Cell Phone)

	A		B		C		D		E		F		G		H	
	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone
1. Less than ¥500	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. ¥501 - ¥1,000	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
3. ¥1,001 - ¥2,000	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
4. ¥2,001 - ¥5,000	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
5. ¥5,001 - ¥10,000	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
6. ¥10,001 - ¥20,000	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
7. ¥20,001 - ¥30,000	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7
8. ¥30,001 - ¥50,000	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8
9. Over ¥50,000	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9

Q6 (1) Question 6 is for all respondents who use the internet.

Over the past year, have you been affected by any of the following in relation to your internet usage?

Circle all that apply in each category (Computer (NB: Used at home) and Cell Phone). If none of the following apply, circle response 10.

	A		B		C		D		E		F		G		H	
	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone
1. Have discovered computer viruses, but have never been infected by one	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. Have discovered computer viruses, and have been infected at least once	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
3. Have received unwanted emails (other than 4 below)	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
4. Have received unwanted emails involving bogus demands	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
5. Unauthorized access* incidents	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
6. Unauthorized disclosure/usage of personal information	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
7. Slander/defamation (e.g. via BBS)	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7
8. Phishing**	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8
9. Other (including copyright violation)	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9
10. None of the above	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10

* Defined here as gaining access without permission to a computer for the purpose of adversely affecting and/or making illegal use of the system.
** Bogus emails designed to look genuine, which direct the recipient to a fake website and request password and other details for fraudulent intent.

(2) This question is for respondents who have discovered computer viruses, whether subsequently infected or not (i.e., responses 1 or 2 in (1) above).
During the past year, how often have you discovered computer viruses?
Circle one response in each category (Computer (NB: Used at home) and Cell Phone)

	A		B		C		D		E		F		G		H	
	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone
1. Every day	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. Once every 2 - 3 days	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
3. About once a week	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
4. About once a month	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
5. About once every three months	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
6. About once every six months	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
7. About once a year	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7

(3) This question is for respondents who have been infected by a computer virus at least once (response 2 in (1) above).
How many times have you been infected by a computer virus in the past year?
Circle one response in each category (Computer (NB: Used at home) and Cell Phone)

	A		B		C		D		E		F		G		H	
1. Once	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. Twice	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
3. Three times	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
4. Four times	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
5. More than four times	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5

(4) This question is for respondents who have received unwanted emails of any type (i.e. responses 3 or 4 in (1) above).
Approximately how often have you received unwanted emails during the past year?
Circle one response in each category (Computer (NB: Used at home) and Cell Phone)

	A		B		C		D		E		F		G		H	
1. Over 10 per day	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. About 5 per day	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
3. About 3 per day	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
4. About 1 per day	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
5. About 1 every three days	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
6. About 1 per week	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
7. Less than 1 per week	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7

(5) This question is for all respondents who use the internet.
What steps do you take to protect against computer viruses and unauthorized access?
Circle all that apply

	A	B	C	D	E	F	G	H
1. Installing virus checking software	1	1	1	1	1	1	1	1
2. Using a virus checking service (e.g. from ISP)	2	2	2	2	2	2	2	2
3. Updating browser and OS regularly	3	3	3	3	3	3	3	3
4. Backing up files and other data	4	4	4	4	4	4	4	4
5. Updating/changing mail program	5	5	5	5	5	5	5	5
6. Taking care not to open emails, attached files and HTML files from unknown sources	6	6	6	6	6	6	6	6
7. Using a firewall	7	7	7	7	7	7	7	7
8. Using separate passwords for each account	8	8	8	8	8	8	8	8
9. Changing passwords on a regular basis	9	9	9	9	9	9	9	9
10. Other	10	10	10	10	10	10	10	10
11. None of the above	11	11	11	11	11	11	11	11

(6) This question is for respondents who use virus checking software (response 1 in (5) above). How often do you update your virus checking software?
Circle one response only

	A	B	C	D	E	F	G	H
1. Daily	1	1	1	1	1	1	1	1
2. At least once a week	2	2	2	2	2	2	2	2
3. At least once a month	3	3	3	3	3	3	3	3
4. At least once every six months	4	4	4	4	4	4	4	4
5. At least once a year	5	5	5	5	5	5	5	5
6. Less than once a year	6	6	6	6	6	6	6	6
7. Have not updated since installing	7	7	7	7	7	7	7	7
8. Don't know	8	8	8	8	8	8	8	8

(7) This question is for respondents who update their browser software and OS regularly (response 3 in (5) above). How often do you update your browser software and/or OS?
Circle one response only

	A	B	C	D	E	F	G	H
1. As soon as a new version is released	1	1	1	1	1	1	1	1
2. At least once every two months	2	2	2	2	2	2	2	2
3. At least once every six months	3	3	3	3	3	3	3	3
4. At least once a year	4	4	4	4	4	4	4	4
5. Less than once a year	5	5	5	5	5	5	5	5
6. Have not updated since installing	6	6	6	6	6	6	6	6
7. Don't know	7	7	7	7	7	7	7	7

(8) This question is for all respondents who use the internet. What strategies have you taken to prevent unwanted emails?
Circle all that apply in each category (Computer (NB: Used at home) and Cell Phone)

	A		B		C		D		E		F		G		H	
	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone	Computer	Cell phone
1. Using a complex email address	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2. Using the Reject Designated Senders feature	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
3. Using the Accept Only Designated Senders feature	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
4. Using the Reject Advertising Without Consent feature	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
5. Changing my email address regularly	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
6. Other	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
7. None	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7

(9) This question is for all respondents who use the internet. What strategies have you taken to protect your personal information?
Circle all that apply

	A	B	C	D	E	F	G	H
1. Refusing to release personal information onto the internet, particularly bulletin boards	1	1	1	1	1	1	1	1
2. Avoiding sites that offer prizes or incentives	2	2	2	2	2	2	2	2
3. Not entering my credit card details	3	3	3	3	3	3	3	3
4. Installing spyware detection software	4	4	4	4	4	4	4	4
5. Being cautious about downloading from websites	5	5	5	5	5	5	5	5
6. Other	6	6	6	6	6	6	6	6
7. None	7	7	7	7	7	7	7	7

This last question is for all respondents aged 15 and over.

Q7

If you use the internet, what worries or annoys you about it? If you do not use the internet, why not? Circle all that apply	A	B	C	D	E	F	G	H
1. Protection of personal information	1	1	1	1	1	1	1	1
2. Security of electronic payment systems	2	2	2	2	2	2	2	2
3. Protection of intellectual property	3	3	3	3	3	3	3	3
4. Infection by computer viruses	4	4	4	4	4	4	4	4
5. Reliability of authentication technology	5	5	5	5	5	5	5	5
6. Too much illegal/harmful information and content	6	6	6	6	6	6	6	6
7. Searching for information takes too long	7	7	7	7	7	7	7	7
8. Connection speed too slow	8	8	8	8	8	8	8	8
9. Computers and other equipment too expensive	9	9	9	9	9	9	9	9
10. Don't understand computers and other equipment	10	10	10	10	10	10	10	10
11. Usage charges too expensive	11	11	11	11	11	11	11	11
12. No way of knowing when emails arrive at destination	12	12	12	12	12	12	12	12
13. The internet has no information I want	13	13	13	13	13	13	13	13
14. No need for it	14	14	14	14	14	14	14	14
15. Other	15	15	15	15	15	15	15	15
16. I don't have any worries	16	16	16	16	16	16	16	16

* **This concludes the survey.**
  Please place the completed survey form in the return envelope provided and mail it back as soon as possible.
  Postage is not required.
  Thank you for your time.

< Glossary >

Term	Explanation
Cell phone/PHS	A small, portable telephone. Some types can be used for ordinary voice calls only, while others can be used for voice calls and for the internet (see "Internet-compatible cell phone /PHS").
Internet-compatible cell phone/PHS	A cell phone or PHS which is capable of connecting to the internet. Can be used for voice calls, as well as for sending and receiving emails and accessing internet services.
3G (third-generation) cell phone	A digital cell phone designed to the IMT-2000 standard set out by the ITU (International Telecommunication Union). Supports high-speed data transmission at 144 kbps and above. Examples include the NTT DoCoMo FOMA, the au CDMA 1X and CDMA 1X WIN, and the Vodafone 700 series and above.
Portable information terminal (PDA)	A small handheld computer offering personal organizer functions such as scheduler, address book and memo pad, as well as emailing and internet functions using a cell phone or PHS and remote access to corporate LANs. Often referred to as PDA (Personal Digital Assistant). PDAs are not the same as notebook computers.
Internet compatible fixed line phon	A fixed telephone capable of connecting to the internet.
Car navigation system	An in-car system that uses satellite signal to determine the vehicle location and displays directions on a map using CD-ROM or DVD-ROM software
ETC tag	An electronic tag used for automatic payment of toll fees while the vehicle is in motion via wireless communication with radio equipment at Electronic Toll Collection gantries.
Internet compatible TV	A television capable of connecting to the internet.
Internet compatible game device	A household computer game device capable of connecting to the internet.
IP phone	A voice telephone service that uses IP (Internet Protocol) for all or part of the communications network.
ISDN line	Integrated Services Digital Network. Generic term for a digital communication network with integrated telephone, facsimile, telex, and data services.
FTTH (fiber to the home) (optic fiber)	A glass fiber cable used for optical communications. Can be used to carry far larger data volumes with lower data attenuation than conventional copper telephone lines.
Wireless (e.g. FWA)	FWA (Fixed Wireless Access) involves wireless communication between antennas installed on subscriber buildings and base stations installed by telecommunications operators. Services are typically provided over the 2.4 GHz and 2.6 GHz bands.
DSL	The generic term for ADSL and other systems that enable high-speed data transmission (including high-speed internet access) over existing copper telephone lines.
ADSL	Asymmetric Digital Subscriber Line. A system that enables high-speed data transmission at 10 – 100 Mbps over conventional copper telephone from telephone exchanges to individual homes and offices. ADSL is asymmetric in that transmission speeds are different in each direction ("uplink" from the user and "downlink" to the user).
Cable Television (CATV)	Television broadcasting over physical cable. Cable television provides a variety of channels in addition to the normal (terrestrial free-to-air) programs, including specialized local programming produced by the cable television operators, sports, music and news programs, and satellite broadcasts. This definition does not include cable television services provided solely as compensation for poor reception.
BS analog broadcasting	Analog broadcasting via broadcasting satellites, including three channels provided by the public broadcaster NHK (NHK1, NHKII, and high-definition TV) and a commercial service provided by WOWOW. Can be accessed directly using a parabola antenna and tuner or special decoder, or through a cable television service.
BS digital broadcasting	Digital broadcasting via broadcasting satellites. Free programming includes three channels from the public broadcaster NHK, as well as BS Nippon Television, BS Asahi, BS-i, BS Japan, and BS Fuji. Subscription services include WOWOW and Star Channel. Can be accessed directly using a parabola antenna and tuner (under a subscription contract) or indirectly through a cable television service.
CS broadcasting	Television and radio broadcasting via communications satellites, providing specialized channels such as movies, overseas news, sports and music. Can be accessed directly using a parabola antenna and tuner, or through a cable television service.
Electronic mail (email)	The electronic version of posting a letter. Emails, like ordinary letter, are sent to the address specified on the front.
Weblog (or blog)	A website containing series of articles or reports filed in chronological order, which is continually being supplemented and updated.
Bulletin board	Also known as an electronic bulletin board or BBS. A software system used to send information to many people, as opposed to the one-to-one nature of email. Messages place on a bulletin board by individual users can be viewed by all the other users who log on. Users can also respond to messages, creating a discussion.
Chat	A software system whereby users engage in real-time typed "conversations" over a network, usually the internet. Each individual contribution to the "conversation" can be viewed by all users.
Social networking service	A community site set up for the purpose of making new friends through introductions. Membership is generally required.
Internet auction	An internet-based auction process whereby the person who submits the highest bid price in response to the price set by the vendor gains the right to purchase the article on offer.
Online banking	Ordinary banking transactions and procedures conducted via the medium of the internet.
Online trading	Share transactions conducted via the medium of the internet.
P2P software	Software to enable computer-to-computer file sharing among unlimited numbers of users.

MIC　Communications Usage Trend Survey in 2004 — Enterprises

(Confidential)

* This survey conforms with the requirements of the Statistical Reports Coordination Law. You may rest assured that your responses on this questionnaire will be used solely for the purpose of statistical analysis, so please feel free to give your full and frank opinions.

1 Except where otherwise stated, your answers should be correct as of the survey date, December 31, 2004.
2 Submit questionnaire to:
　　（Direct inquiries to）

3 This survey is being conducted by the market research company stated above under commission from the Ministry of Internal Affairs and Communications.

	Department	
(affix name label here)	Name of person completing the survey	
	Contact telephone	

Q1. This question is about the configuration and usage of communications networks and the internet at your company.

(1) Which of the following statements best describes your usage of **communications networks**? **Circle one response for each** question.

Type of network	Description
1) Internal (LAN)	1. Company-wide network in place
	2. Network currently reaches some but not all offices and divisions
	3. No network yet, but we plan to install one
	4. No network at present, and no plans to install one
2) Inter-company (WAN)	1. Company-wide network in place
	2. Network currently reaches some but not all offices and divisions
	3. No network yet, but we plan to install one
	4. No network at present, and no plans to install one

(2) This question is for companies that use a LAN.
　　Does your company **use a wireless LAN**?
　　Circle one response only

1. Yes, throughout the company	3. No, but we plan to install a wireless LAN
2. Yes, but only in some offices or divisions	4. No, and we have no plans to install a wireless LAN

(3) This question is for companies using a LAN or WAN. **How did** your company **install** your LAN and/or WAN?
　　Circle one response only

1. All work was done in-house	3. All of the work was outsourced
2. Some of the work was done in-house, and some was outsourced	

(4) This question is for companies that use a LAN and/or WAN.

Which of the following communications services does your company use? **Circle one response in each category**

(Trunk Line System and Branch Line System).

 * A system that is not divided into trunk and branch line systems should be treated as a trunk line system only for the
   purpose of this question.

Trunk Line System (network linking major access points and/or computer centers)

1. Wide-area Ethernet[*1]	4. Dedicated line[*4]	7. Dial-up
2. IP-VPN[*2] (VPN over IP service network provided by carrier)	5. Frame relay[*5]	8. Other
3. Internet VPN[*3] (VPN over public network, i.e. the internet)	6. Cell relay[*6]	9. Unknown

Branch Line System (network linking small to medium-sized access points)

1. Wide-area Ethernet[*1]	4. Dedicated line[*4]	7. Dial-up
2. IP-VPN[*2] (VPN over IP service network provided by carrier)	5. Frame relay[*5]	8. Other
3. Internet VPN[*3] (VPN over public network, i.e. the internet)	6. Cell relay[*6]	9. Unknown

* 1"Ethernet" refers to LAN specifications from the Institute of Electrical & Electronics Engineers (IEEE) 802.3 Committee and networks configured in accordance with these specifications. "Wide-area Ethernet" refers to a large-scale network service using a combination of Ethernet switching hubs.
*2 Abbreviation of Internet Protocol-Virtual Private Network. High-security virtual private network service operating on closed IP networks provided by carriers.
*3 Virtual private network service operating over public networks (i.e., the internet).
*4 Communications service that connects directly with and retains exclusive possession of specific spaces.
*5 Communications service that breaks up data into "frames" of variable length for transmission.
*6 Communications service that breaks up data into "cells" of fixed length via the ATM (asynchronous transfer mode) process.

(5) Is it possible to **connect to the company's internal and/or inter-company networks from an external computer, cell phone or PDA device**?

Circle one response in each category

Device	External connectivity
1) Computer	1. Yes
	2. No, but we plan to introduce this technology
	3. No, and we have no plans to introduce this technology
2) Cell phone/PDA	1. Yes
	2. No, but we plan to introduce this technology
	3. No, and we have no plans to introduce this technology

(6) Does your company **use the internet (such as sending and receiving emails and viewing websites)** for business purposes? **Circle one response only**

1. Yes, throughout the company	3. No, but we plan to in future
2. Yes, but only in certain offices/divisions	4. No, and we do not plan to in future

(7) This question is for companies that selected options 1 or 2 in (6) above.

How does your company **access the internet**?

Circle all that apply

1. Dial-up	4. CATV	7. DSL
2. ISDN (non-permanent)	5. FTTH (optic fiber)	8. Dedicated line
3. ISDN (always connected)	6. Wireless (e.g. FWA)	9. Other

(8) This question is for companies that use the internet (options 1 or 2 in (6) above).

What is **the maximum communication speed of the internet line mainly used** by your company?

Circle one response only

1. 64 kbps	4. 512 kbps	7. 8 Mbps	10. 100 Mbps
2. 128 kbps	5. 1.5 Mbps	8. 12 Mbps	11. Over 100 Mbps
3. 256 kbps	6. 5 Mbps	9. 45 Mbps	12. Don't know

(9) Approximately **how many employees are there per terminal capable of connecting** to internal and/or inter-company networks?

    Circle one response only

1. One or more terminals per employee	3. Three employees per terminal	5. Five or more employees per terminal
2. Two employees per terminal	4. Four employees per terminal	6. N/A

(10) Does your company **have a website**? **Circle one response only**

1. Yes	2. No

(11) Which of the following issues regarding information and communications networks (including internal and inter-company networks and the internet) are of **concern** to your company? **If your company does not use networks, which of the following issues have influenced your decision not to use networks?**

    Circle all that apply

1. Hard to implement security measures	9. Authentication technology not reliable enough
2. Operation/management too costly	10. Electronic payment systems not reliable enough
3. Shortage of suitably trained personnel	11. Poor awareness among employees of security
4. Too hard to restore networks after a failure	12. Connection charges too high
5. Inadequate protection of intellectual property such as copyright	13. Connection speeds too slow
6. Virus threats	14. Other
7. Of limited benefit to our company	15. None
8. Difficult to quantify the benefits	

(12) This question is for companies with a shortage of trained personnel (option 3 in (11) above).

    How many more trained personnel does your company **require**?

    Circle one response only

1. One	3. Three	5. Six to ten
2. Two	4. Four or five	6. More than ten

(13) Does your company **use a video conferencing system**? **Circle one response only**

1. Yes, throughout the company	3. No, but we plan to in future
2. Yes, but only in certain offices/divisions	4. No, and we do not plan to in future

(14) Does your company **use IP telephones**? **Circle one response in each category**

Category	Response
1) Outside lines	1. Yes, throughout the company 2. Yes, but only in some offices/divisions 3. No, but we plan to in future 4. No, and we do not plan to in future
2) Internal lines between offices	1. Yes, throughout the company 2. Yes, but only in some offices/divisions 3. No, but we plan to in future 4. No, and we do not plan to in future
3) Internal lines within individual offices	1. Yes, throughout the company 2. Yes, but only in some offices/divisions 3. No, but we plan to in future 4. No, and we do not plan to in future

(15) This question is for companies that use or plan to use IP telephones (options 1, 2 or 3 in any of the categories in (14) above). If you already use IP telephones, **why did you decide to switch to IP**?
If you are planning to introduce IP telephones, what do you expect to be the benefits for your company?

    Circle all that apply

1. Lower usage charges	4. Integrated messaging with IP communication networks
2. Lower relocation costs	5. Other
3. Lower PBX maintenance/operation costs	

Q2 This section concerns e-commerce and is for all respondents.

(1) Does your company **use the internet* for procurement and/or sales**? **Circle all that apply**

1. Yes, for procurement from corporate suppliers	3. Yes, for sales to consumers
2. Yes, for sales to corporate clients	4. No, not for any of these

   * Including dedicated TCP/IP lines (based on the common TCP/IP protocol) as well as the public internet.

(2) This question is for companies that use the internet for procurement (option 1 in (1) above). What would be the approximate **value of procurement over the internet by your company in the 2003 calendar year**?
   Write the amount in the box, **in ten thousand of yen**.

ten thousand yen

(3) This question is for companies that use the internet for sales to corporate clients and/or consumers (options 2 and 3 in (1) above). What would be the approximate **value of sales over the internet by your company in the 2003 calendar year**? And what proportion of this would be sales to consumers? Write the total value of sales (in thousands of yen) and the proportion of sales to customers in the box.

ten thousand yen, of which   % was to consumers

(4) This question is for all respondents.
   Which of the following issues regarding e-commerce are of concern to your company? If your company does not use e-commerce, which of the following issues have influenced your decision not to use e-commerce? Circle all that apply

1. Special skills required for system design and installation	9. Incompatible with traditional business practices
2. Communication protocols differ among industries	10. Connection speeds too slow
3. Forms and data formats differ among industries	11. Connection charges too high
4. Inadequate security	12. No suitable payment method available
5. High investment costs	13. Don't need it
6. High running costs for information systems	14. Other
7. Lack of legal framework and regulations for e-commerce	15. None
8. Trading partners do not have the requisite IT systems in place	16. Don't know

Q3 This section concerns telecommuting and is for all respondents.

   Has your company **introduced telecommuting***? **Circle one response only**

1. Yes	2. No, but we plan to	3. No, and we do not plan to

   * Telecommuting refers to the use of communication networks to allow employees to work outside the office in the same
      way as if they were actually at the office. Examples include working from home, working in satellite offices (locations other
      than company premises) and mobile work (using mobile terminals while out of the office on sales or other assignments).

   This question is for companies that have introduced telecommuting (option 1 above).
   1) **What proportion of your staff work via telecommuting**? **Circle one response only**

1. Less than 5%	3. 10% up to 30%	5. 50% up to 80%
2. 5% up to 10%	4. 30% up to 50%	6. 80% or more

   2) What were your **objectives in introducing telecommuting**? **Circle all that apply**

1. Increase productivity/efficiency of standard tasks	7. Attract talented personnel
2. Boost creativity in areas that generate added value	8. For the benefit of employees with special needs, such as physically
3. Allow employees more flexibility and healthier lifestyles	disabled and older employees and women with children
4. Reduce office operation costs	9. Don't know
5. Reduce commuting time	10. Other
6. Boost customer satisfaction	

   3) Would you say that overall, telecommuting has been a **success** in terms of the objectives nominated in 2) above?
         Circle one response only

1. Very much so	2. Somewhat	3. No

Q4. This section concerns IT training for employees and is for all respondents.

Which of the following does your company provide?

Circle all that apply

1. In-house IT training programs	5. Time off to attend IT courses
2. External IT training programs	6. In-house IT skills testing
3. Subsidies for IT courses undertaken by employees	7. Other training initiatives
4. Salary incentives linked to IT qualifications	8. None of the above

Q5. This section concerns security measures and is for companies that use networks
(in-house and inter-company networks and the internet).

(1) In the past year, have any of the following **security breaches occurred** in connection with your company's use of networ|

Circle all that apply. If none, circle option 10.

1. Computer virus discovered, but computers not infected	6. Slander/defamation over the internet (e.g. BBS)
2. Computer virus discovered, and computers infected (at least once)	7. Modification/tampering with website
	8. Disclosure of information, either intentional or through negligence
3. Unauthorized access*	
4. Unwittingly used as springboard/relay point for spam mail	9. Other
5. DoS attack**	10. None

* Access without permission to the company's computer system for the express purpose of adversely affecting and/or making illegal use of the system.

** Denial of Service attack: An attack designed to cripple a service, often by bombarding mail servers with massive volumes of email

(2) This question is for companies that have detected computer viruses (options 1 or 2 in (1) above).

Over the last year, **how often** has your company detected computer viruses?

Circle one response only

1. Every day	4. About once a month	6. About once every six months
2. Once every two or three days	5. About once every three months	7. About once a year
3. About once a week		

(3) This question is for companies that have been infected by a computer virus (option 2 in (1) above).

Over the past year, **how many times** has your company been affected? **Circle one only**

1. Once	3. Three times	5. Five or more times
2. Twice	4. Four times	

(4) Which of the following **data security and anti-virus strategies does your company employ**?

Circle all that apply

1. Security Policy	11. Access log records
2. Security audits	12. User authentication systems
3. Outsourcing of security management	13. Data and/or network encryption
4. Employee training	14. Line monitoring
5. Virus-checking program installed on computers and other terminals (OS/software)	15. Firewall
	16. Proxy server or equivalent
6. Virus-checking program installed on server	17. Intrusion Detection System (IDS)
7. OS security patches	18. Other
8. Virus wall on external connections	19. Don't know
9. Virus checking procedures manual, used in employee training	20. None
10. Access restrictions such as ID and password authorization	

(5) This question is for companies that employ virus-checking programs (options 5 or 6 in (4) above).
How often does your company update the pattern files used by your virus checking program?
Circle one response only

1. Every day	5. At least once every three months	9. Have not updated since installing
2. At least once a week	6. At least once every six months	10. Don't know
3. At least once a month	7. At least once a year	
4. At least once every two months	8. Less than once a year	

(6) This question is for companies that install OS security patches (option 7 in (4) above).
How often does your company update OS security patches? **Circle one response only**

1. As soon as they are released	4. At least once every six months	7. Have not updated since installing
2. At least once every two months	5. At least once a year	8. Don't know
3. At least once every three months	6. Less than once a year	

(7) **What privacy protection measures has your company taken for personal information**? **Circle all that apply.**

1. Use the Privacy Logo	7. More stringent requirements of contractors
2. Formulated a privacy policy	(such as Privacy Logo)
3. Appointed a Personal Information Privacy Protection Officer	8. Other
4. Reduced the amount of personal information collected	9. None
5. Reconfigured systems and/or procedures	10. Don't know
6. Internal training	

Q6. This question is about the effect of IT on corporate management at your company.

(1) Investment in information technology

1) Over the past year, has your company invested in information technology such as computers, internal or inter-company networks or internet related equipment?
Circle one response only

1. Yes	2. No

2) This question is for companies that invested in information technology over the past year (option 1 above).
What were the objectives of that investment? Circle all that apply

1. To reduce procurement and/or inventory costs	6. To improve processing efficiency and/or speed
2. To reduce general operating expenses	7. Other (specify):
(such as wage bills)	8. To keep up with other companies
3. For sales/marketing	9. Don't know
4. For product/service development	10. No clear reason
5. For simplification/streamlining of the organization	

3) Would you say that the investment in information technology over the past year has benefited your company?
Circle one response only

1. Yes	2. No	3. Negative effect (cost of investment only)	4. Don't know

4) This question is for companies that have benefited from investment in information technology over the past year (option 1 above).
What have been the positive benefits of investment in information technology over the past year?
Circle all that apply

1. Simplification/streamlining of the organization	8. Lower procurement costs for parts and materials
2. Improved processing efficiency and/or speed	9. Lower general operating expenses
3. More internal knowledge and information sharing	10. Higher turnover
4. Higher customer satisfaction	11. Expansion into new areas of business
5. Faster ordering and settlement procedures	12. Other
6. Enhanced corporate image and/or recognition	13. Not sure
7. More accurate inventory (and lower inventory costs)	

(2) Does your company have a Chief Information Officer (CIO)*?

If yes, which of the following best describes your CIO? **Circle one response in each category**

	Current status	Rank
CIO	1. Full-time CIO	1. President class
	2. CIO is not full-time, but the bulk of his/her work is IT-related	2. Vice president class
	3. CIO is not full-time; only some of his/her work is IT-related	3. Senior managing or managing director class
	4. No CIO at present, but we plan to appoint one in future	4. Executive officer class
	5. No CIO at present and no plans to appoint one in future	5. Others ( )

* The officer responsible for coordination and supervision of management strategies and information/communication strategies

Finally, the following questions are designed to provide background information about your company.
If the information is already given in your annual report, you may attach a copy of the relevant portion of the report and leave this section blank. Please underline the relevant parts of the report.

F1. What is the capital of your company? **Circle one response.**

1. Less than ¥10 million	4. ¥50 million - less than ¥100 million	7. ¥1 billion - less than ¥5 billion
2. ¥10 million - less than ¥30 million	5. ¥100 million - less than ¥500 million	6. ¥5 billion or more
3. ¥30 million - less than ¥50 million	6. ¥500 million - less than ¥1 billion	

F2. What is your company's annual sales revenue? Write the amount in million yen in the box.

Million yen

Indicate sales revenue for FY2003 (April 2003 - March 2004) or, if unknown, a known amount for the most recent fiscal year.

For banks, enter ordinary income; for life insurance companies, enter income from premiums etc; for nonlife insurance companies, enter net premiums.

F3. What is your company's annual operating income? Write the amount in million yen in the box.

Million yen

Indicate operating income for FY2003 (April 2003 - March 2004) or, if unknown,

For banks, enter operating profit; for life insurance companies, enter basic profit; for nonlife insurance companies, enter underwriting profit.

F4. How many employees does your company have? Write the number in the box.

The number of employees is defined as the number of regular workers as at December 1, 2004 or the last day of the closest pay period, including temporary workers, day laborers and part-timers with contracts for one month or more or who worked 18 or more days in October and November 2003 and who are still employed by the company as of the survey date.

> *** This concludes the questions.**
> **Please return the completed survey form in the return envelope provided.**
> **Postage is not required. Thank you very much for your cooperation.**

(Confidential) MIC   Communications Usage Trend Survey in 2004 — Business Establishments

∗ This survey conforms with the requirements of the Statistical Reports Coordination Law. You may rest assured that your responses on this questionnaire will be used solely for the purpose of statistical analysis, so please feel free to give your full and frank opinions.

1 Except where otherwise stated, your answers should be correct as of the survey date, December 31, 2004.
2 Submit questionnaire to:
　（Direct inquiries to）

3 This survey is being conducted by the market research company stated above under commission from the Ministry of Internal Affairs and Communications.

(affix name label here)	Department	
	Name of person completing the survey	
	Contact telephone	

- -

Q1. This question is about the information and communications equipment and devices that your company owns.

Which of the following **(1 through 9) does your company own** (including equipment used on rental or lease basis)?
Circle one response (Yes or No) in each category.
If your answer is Yes, **how many? Write the number** in the box provided.
Cell phones that also operate as PHS devices should be entered twice (i.e., in both (1) and (4), or both (2) and (5) as appropriat
If your answer is No, write 0 in the box.

1) Cell phone (other than (2) and (3))	1. Yes 2. No	Number:
2) Internet compatible cell phone* (other than (3))	1. Yes 2. No	Number:
3) 3G cell phone*	1. Yes 2. No	Number:
4) PHS (other than (5))	1. Yes 2. No	Number:
5) Internet compatible PHS*	1. Yes 2. No	Number:
6) Personal digital assistant* (PDA)	1. Yes 2. No	Number:
7) Radio pager	1. Yes 2. No	Number:
8) Computer	1. Yes 2. No	Number:
9) Fax machine	1. Yes 2. No	Number:

* Give estimate if exact number not known
* Internet compatible cell phone/PHS — Cell phone/PHS device capable of connecting to the internet. Can be used for voice calls, emailing and accessing internet services.
* 3G cell phone — Digital cell phone designed to IMT-2000 standards for high-speed data transmission. Examples include the NTT DoCoMo FOMA, the au CDMA 1X and CDMA 1X WIN, and the Vodafone 700 series and above.
* Personal digital assistant (PDA) — A small handheld computer offering personal organizer functions such as scheduler, address book and memo pad, as well as emailing and internet functions using a cell phone or PHS and remote access to corporate LANs. Often referred to as PDA (Personal Digital Assistant). PDAs are not the same as notebook

Q2. This question concerns your use of communications media.

Which of the following (1 through 8) does your company use? Circle all that apply in each column
(Note: Do not fill out areas that are not relevant to the work of your company.)

	Which of these communications media do you use? (Multiple response)					
	Post	Telephone	Fax	Website	Email	Other
1) Advertising and promotion of products and events	1	2	3	4	5	6
2) Providing information on a regular basis	1	2	3	4	5	6
3) Sending out invoices/statements	1	2	3	4	5	6
4) Sending out official receipts and similar	1		3		5	6
5) Company brochures and recruiting literature	1	2	3	4	5	6
6) Accepting suggestions/contributions	1	2	3	4	5	6
7) Accepting applications/notifications	1	2	3	4	5	6
8) Questionnaire surveys	1	2	3	4	5	6

Q3. This question is about your internet usage.

(1) Does your company **use the internet (such as sending and receiving emails and viewing websites) for business purpose**
Circle one response only

— 1. Yes   3. No, and we are unlikely to need it in the future
2. No, but we plan to in the future

How does your company access the internet? **Circle one response only**

1. Dial-up   4. CATV   7. DSL
2. ISDN (non-permanent)   5. FTTH (optic fiber)   8. Dedicated line
3. ISDN (always connected)   6. Wireless (e.g. FWA)   9. Other

* DSL: The generic term for systems that enable high-speed data transmission (including high-speed internet access) over
existing copper telephone lines. Includes ADSL (Asymmetric Digital Subscriber Line).

What is the maximum communication speed of the internet line used by your company? **Circle one response**

1. 64 kbps   4. 512 kbps   7. 8 Mbps   10. 100 Mbps
2. 128 kbps   5. 1.5 Mbps   8. 12 Mbps   11. Over 100 Mbps
3. 256 kbps   6. 5 Mbps   9. 45 Mbps   12. Don't know

How many terminals that can connect to the internet does your company have? **Write the number in the box.**

Internet compatible terminals

* Give estimate if exact number is not known

（2）**What does your company use the internet for**? **Circle all that apply**

1. Internal and external communications   9. Selling products and services to corporate clients
2. Supplying information and advertising to websites   10. Selling products and services to consumers
3. Searching/sourcing information   11. Electronic payment and remittance services
4. Sharing information/data with affiliated companies 12. Technical support (e.g. for products)
5. Obtaining freeware and other software   13. IP telephone service
6. Conducting market research   14. e-learning programs
7. Conducting quizzes and competitions   15. Recruiting
8. Procurement of materials and components from suppliers 16. Other

Q4. This question concerns security strategies implemented by businesses that use information and communication networks (including in-house and inter-company networks and the internet).

(1) In the past year, have any of the following **security breaches occurred** in connection with your company's use of information and communication networks? **Circle all that apply**. **If none, circle option 10.**

1. Computer virus discovered, but computers not infected	6. Slander/defamation over the internet (e.g. BBS)
2. Computer virus discovered, and computers infected (at least once)	7. Modification/tampering with website
3. Unauthorized access*	8. Disclosure of information, either intentional or through negligence
4. Unwittingly used as springboard/relay point for spam mail	9. Other
5. DoS attack**	10. None

* Access without permission to the company's computer system for the express purpose of adversely affecting and/or making illegal use of the system.
** Denial of Service attack: An attack designed to cripple a service, often by bombarding mail servers with massive volumes of email

(2) This question is for companies that have detected computer viruses (options 1 or 2 in (1) above).

Over the last year, **how often** has your company detected computer viruses?

Circle one response only

1. Every day	4. About once a month	6. About once every six months
2. Once every two or three days	5. About once every three months	7. About once a year
3. About once a week		

(3) This question is for companies that have been infected by a computer virus (option 2 in (1) above).

Over the past year, **how many times** has your company been affected? **Circle one only**

1. Once	3. Three times	5. Five or more times
2. Twice	4. Four times	

(4) Which of the following **data security and anti-virus strategies does your company employ**?
Circle all that apply

1. Security Policy	11. Access log records
2. Security audits	12. User authentication systems
3. Outsourcing of security management	13. Data and/or network encryption
4. Employee training	14. Line monitoring
5. Virus-checking program installed on computers and other terminals (OS/software)	15. Firewall(s)
6. Virus-checking program installed on server	16. Proxy server or equivalent
7. OS security patches	17. Intrusion Detection System (IDS)
8. Virus wall on external connections	18. Other
9. Virus checking procedures manual, used in employee training	19. Don't know
10. Access restrictions such as ID and password authorization	20. None

(5) This question is for companies that employ virus-checking programs (option 5 or 6 in (4) above).
How often does your company update the pattern files used by your virus checking program?
Circle one response only

1. Every day	5. At least once every three months	9. Have not updated since installing
2. At least once a week	6. At least once every six months	10. Don't know
3. At least once a month	7. At least once a year	
4. At least once every two months	8. Less than once a year	

(6) This question is for companies that install OS security patches (option 7 in (4) above).
   How often does your company **update OS security patches**? **Circle one response only**

1. As soon as they are released	4. At least once every six months	7. Have not updated since installing
2. At least once every two months	5. At least once a year	8. Don't know
3. At least once every three months	6. Less than once a year	

Finally, please provide some background information about your company.

F1. **How many employees** does your company have?
   Write the number in the box.

[   ] person

NB: The number of employees is defined as the number of regular workers as at December 1, 2004 or the last day of the closest pay
   period, including temporary workers, day laborers and part-timers with contracts for one month or more or who worked
   18 or more days in October and November 2003 and who are still employed by the company as of the survey date.

F2. What is your company's **annual sales revenue**? **Write the amount in million yen in the box.**

[   ] million yen

NB: Annual sales revenue for FY2003 (the 12-month period from April 2003 to March 2004), excluding non-operating
   income. If unknown, enter a known amount for the most recent fiscal year.
   Write '0' if your company has generated no sales revenue in the past year.
 * For banks, enter ordinary income; for life insurance companies, enter income from premiums etc; for nonlife insurance
   companies, enter net premiums.

* **This concludes the questions.**
  Please return the completed survey form in the return envelope provided.
  Postage is not required. Thank you very much for your cooperation.