Additional notes

(Note1) Survey on the latest trends in ICT, R&D, and digital utilization in Japan and other countries

(a) Questionnaire surveys for the general public

These surveys were conducted on general citizens in Japan, the U.S., Germany, and China to examine the state of digital utilization in work, private services, and public services.

Items	Overview						
Sampling method	Online questionnaire survey						
Survey period	January–February 2025						
Target	Respondents were selected from the survey company's registered panel, ensuring a balanced age distribution.						
Number of valid responses		20s	30s	40s	50s	60s	Total
	Japan	206	206	206	206	206	1030
	U.S.	104	104	104	104	104	520
	Germany	104	104	104	104	104	520
	China	104	104	104	104	104	520
	Total	518	518	518	518	518	2590
	* Individuals aged below 20 or 70 and older were excluded from the survey.						
Main survey items	• Basic attributes (age group) • Status of digital technology utilization and related issues • Expectations and concerns regarding the progress of digitalization • Status of AI utilization and perspectives on AI-related risks • Attitudes and intentions toward providing personal data • Expectations for resolving social issues through digital technologies						

(b) Questionnaire surveys on business activities

These surveys were conducted on companies in Japan, the U.S., Germany, and China to examine the state of digital utilization from the perspectives of technology, data, organization, and human resources.

Items	Overview		
Sampling method	Online questionnaire survey		
Survey period	January–February 2025		
Target	From among the survey company's registered panel, individuals who reside in each country, hold managerial or higher positions in companies with more than 10 employees and that initiated digitalization efforts by 2024, and possess a sufficient understanding of their company-wide strategies and other related matters were selected as survey respondents.		
Number of valid responses		Large companies	SMEs	Total
	Japan	372	143	515
	U.S.	211	98	309
	Germany	227	82	309
	China	272	37	309
	Total	1082	360	1442
	* Based on the definition of SMEs provided by the Small and Medium Enterprise Agency and the results of last year's commissioned survey, companies in the manufacturing, construction, electricity/gas/heat/water supply, finance/insurance, real estate/leasing, transportation/postal services, and information and communication industries with 300 or more employees were classified as large companies, while those with fewer than 300 employees were classified as SMEs. Companies in the wholesale/retail trade and service/other sectors with 100 or more employees were classified as large companies, while those with fewer than 100 employees were classified as SMEs.		
Main survey items	• Basic attributes (industry type and number of employees) • Data and technologies utilized in digitalization initiatives • Effects of digitalization initiatives • Organizational initiatives for promoting digitalization • Initiatives to address digital talent shortages and secure digital personnel • Issues in advancing digitalization • Status of AI and cloud service utilization		

(Note 2) Survey on digital utilization trends in the 2024 Noto Peninsula Earthquake
(a) Questionnaire survey

Based on the damage caused by the Noto Peninsula Earthquake that struck in January 2024, surveys were conducted on residents of cities and towns in Ishikawa Prefecture, including Anamizu Town, Uchinada Town, Shika Town, Suzu City, Nanao City, Noto Town, and Wajima City, as well as residents of Himi City in Toyama Prefecture.

Items	Overview	
	Monitor survey	Open survey

Target	From among the web survey panel members, individuals who met either of the following conditions and responded that they had been affected by the Noto Peninsula Earthquake were selected as survey respondents.
	• Individuals who resided in the following regions at the time of the Noto Peninsula Earthquake: Anamizu Town, Uchinada Town, Shika Town, Suzu City, Nanao City, Noto Town, Wajima City, Kanazawa City, Nakanoto Town, Hakui City, Kaga City, Kahoku City, Komatsu City, Tsubata Town, Nomi City, and Hodatsushimizu Town in Ishikawa Prefecture, and Himi City in Toyama Prefecture Individuals who were not residing in a city or town in Ishikawa Prefecture or in Himi City, Toyama Prefecture, at the time of the earthquake were excluded from the survey.
	• Individuals who resided in the Tokyo, Nagoya, or Osaka metropolitan areas and were temporarily staying in any of the cities or towns listed below at the time of the Noto Peninsula Earthquake:
	  - Ishikawa Prefecture: Anamizu Town, Uchinada Town, Shika Town, Suzu City, Nanao City, Noto Town, and Wajima City
	  - Toyama Prefecture: Himi City
		Individuals who met the following condition and responded that they had been affected by the Noto Peninsula Earthquake were selected as survey respondents.
		• Individuals who participated in the interview survey in any of the cities or towns listed below, as well as their associates:
		  - Ishikawa Prefecture: Anamizu Town, Uchinada Town, Shika Town, Suzu City, Nanao City, Noto Town, and Wajima City

Number of responses	Region	Monitor survey		Open survey	Total
		Residence	Temporary stay	(Residence only)	
	Anamizu Town	7	21	5	33
	Uchinada Town	40	8	2	50
	Shika Town	23	14	10	47
	Suzu City	12	26	17	55
	Nanao City	72	52	15	139
	Noto Town	17	61	2	80
	Wajima City	25	100	3	128
	Himi City	12	22	0	34
	Kanazawa City	366	-	1	367
	Nakanoto Town	21	-	3	24
	Hakui City	21	-	0	21
	Other regions in Ishikawa Prefecture	114	-	0	114
	Total	730	304	58	1092

Survey method	Respondents were selected from among the survey company's registered panel, and their responses were collected via a web-based questionnaire.	Following interviews, the interviewees and their associates (such as colleagues) were provided with the questionnaire URL, and their responses were collected through the website.
Survey period	Late November 2024	Late January–late February 2025
Main survey items	Both the monitor survey and open survey included the following questionnaire items: • Basic attributes (age group) • Daily use of ICT • Awareness of disaster preparedness and evacuation behavior before the earthquake • Conditions and evacuation behavior during and after the earthquake (from the time of occurrence through the first few hours) • Conditions during the first few days (two to three days) after the earthquake • Conditions up to the end of January 2024 • Earthquake-related posts containing unreliable information or merely seeking to get a large number of impressions	

(b) Interview survey

Interview surveys were conducted on organizations located in cities and towns in Ishikawa Prefecture that suffered particularly severe damage from the Noto Peninsula Earthquake, which struck in January 2024, including Anamizu Town, Uchinada Town, Shika Town, Suzu City, Nanao City, Noto Town, and Wajima City, as well as in Kanazawa City, which accepted many secondary evacuees and served as an external support base. The interviewed organizations included local governments, companies, hospitals, agricultural and fishery cooperatives, chambers of commerce, and NPOs involved in disaster response.

Items	Overview		
Target and number of responses	Interview surveys were conducted on individuals who reside primarily in the above-mentioned regions and belong to the target groups listed below:		
	Classification	Target group	Number of responses
	Disaster response	Disaster response divisions at local governments (prefectures, cities, and towns)	10
		Hospitals, nursing care facilities, etc.	4
		Agricultural and fishery cooperatives, chambers of commerce	5
		NPOs, private volunteers, social welfare councils, etc.	7
		Operation and management staff of schools and evacuation centers	3
		Operation and management staff of temporary housing provided by local governments (prefectures, cities, and towns)	6
	Business restoration and continuity	Information and planning divisions at local governments (prefectures, cities, and towns)	9
		Companies (media, communications, infrastructure, local offices of national corporations, and local companies)	13
	Total		57
Survey method	Face-to-face and online interview surveys (with questionnaire items sent beforehand)		
Survey period	Mid-December 2024–early March 2025		
Main survey items	For the respondents in the above target groups, questions were asked regarding how they utilized the ICT environment in responding to the disaster, including from the perspective of ensuring business continuity, based on their respective positions and roles. ■Disaster response • Pre-disaster preparations, such as developing and updating disaster prevention manuals and designating specific roles and responsibilities • Information and communication systems (e.g., social media) used after the earthquake to collect, share, and disseminate information about affected areas and support for evacuees • Issues in information collection, sharing, and dissemination—such as considerations for elderly individuals and the handling of personal information—and effective initiatives to address them • ICT services provided to evacuation centers and temporary housing, requests from affected individuals, and future issues • Responses to and operational impacts of the spread of unreliable information on the internet ■Business restoration and continuity • Pre-disaster status of information systems, network redundancy, cloud migration, and backup measures • Damage to information systems caused by the earthquake, the impact on operations, and alternative tools used during system recovery • Efforts and issues in communication and information sharing among relevant parties • Operational impacts of the spread of unreliable information on the internet		