

Survey on the Structure of *Ken*

A report on the emerging groups and
networks people are creating.

生活総研

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About the Survey on the Structure of *Ken* Report

Hakuhodo Institute of Life and Living (HILL) publishes *Dynamics of Japanese Sei-katsu-sha*, a future outlook on emerging lifestyles, at the beginning of every year. *Dynamics of Japanese Sei-katsu-sha 2012* is titled *Ken: Toward New Social Capital*. It reports on the new groups and networks that people are actively forming around a specific purpose or goal, regardless of their gender, age group, location or occupation.

At HILL, we call these new groups and networks *ken*, and the act of forming such groups and networks *ken*-building.

Definition of *ken*

“A group or network of people with a specific goal or purpose that you created or joined or that was spontaneously formed by people at a particular place to experience something together.”

Previously, associations and relationships based on family ties and the geographic communities where people live served as important safety nets in times of crisis. With the increased mobility of the Japanese population, building networks and networking with individuals became increasingly more useful for exchanging mutual support, seeking assistance, and simply exchanging relevant information. The Internet has enabled people, regardless of their background, where they live, their age, gender, or nationality, to share experiences in what is referred to as *communities of interest*. *Ken* are a further evolution of this network and community building. *Ken* differ from previous connections more in terms of degree than in nature. A *ken* is a network, often with a specific purpose (sometimes a social mission). It is open to anyone who is willing to take on a responsible role in pursuing a common goal. *Ken*-building is an expansive process; it is flexible and fluid in both decision making and delivery of actions.

Examples of *ken*

- A group of university students looking to land jobs (Male, 20, Kanagawa Pref.)
- A Net game community (Male, 23, Kumamoto Pref.)
- A group of people with IQs in the top 2% (Male, 25, Shizuoka Pref.)
- A group of anime enthusiasts in our city (Male, 27, Fukuoka Pref.)
- A group of people looking to live in Vancouver (Male, 31, Fukuoka Pref.)
- A group looking to regenerate woodlands (Female, 38, Osaka Pref.)
- NPO volunteers promoting renewable energy (Male, 48, Aichi Pref.)
- Mini model 4WD club (Male, 53, Osaka Pref.)
- Volunteers at a nursing home (Female, 57, Tokyo)
- Group of people with similar medical issues (Female, 61, Ehime Pref.)
- “Space killifish” breeding group (Male, 63, Kyoto Pref.)
- Harley (tandem) riders group (Female, 64, Kanagawa Pref.)

The report looks at the proportion of *sei-katsu-sha* who have *ken*, the characteristics of *ken*, and the kinds of people who have *ken*.

Survey outline

Territory: All 47 prefectures of Japan

Survey method: Internet survey

Target population: 3,348 males & females aged 15–69

Allocated to 8 geographical areas across Japan according census population data.

Allocated equally by age, in 10–year increments. However, as the teen cohort is aged 15–19, the allocation is half the size of other cohorts.

Males: 1,674 (154 males aged 15–19; 304 males each aged 20–29, 30–39, 40–49, 50–59, 60–69)

Females: 1,674 (154 females aged 15–19; 304 females each aged 20–29, 30–39, 40–49, 50–59, 60–69)

Area	Prefectures	Samples
Hokkaido	Hokkaido	154
Tohoku	Aomori, Iwate, Miyagi, Akita, Yamagata, Fukushima	232
Kanto	Ibaraki, Tochigi, Gunma, Saitama, Chiba, Tokyo, Kanagawa	1,144
Chubu	Niigata, Toyama, Ishikawa, Fukui, Yamanashi, Nagano, Gifu, Shizuoka, Aichi, Mie	606
Kinki	Shiga, Kyoto, Osaka, Hyogo, Nara, Wakayama	550
Chugoku	Tottori, Shimane, Okayama, Hiroshima, Yamaguchi	198
Shikoku	Tokushima, Kagawa, Ehime, Kochi	100
Kyushu	Fukuoka, Saga, Nagasaki, Kumamoto, Oita, Miyazaki, Kagoshima, Okinawa	364
Total		3,348

Survey period: Friday, October 14–Monday, October 17, 2011

Planning/Analysis: Hakuhodo Institute of Life and Living

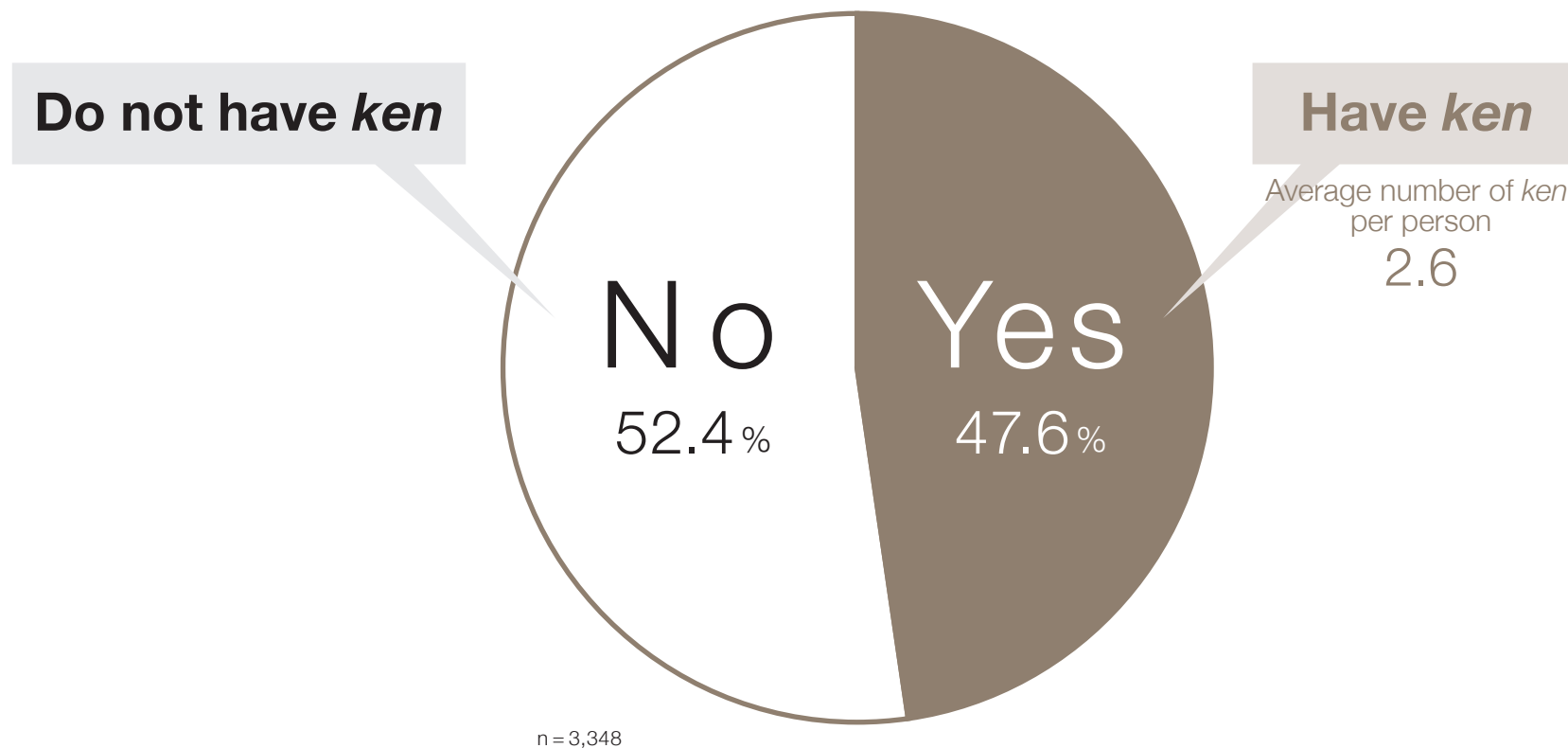
Implementation/Tabulation: Macromill, Inc.

Basic Data ① One in two people have *ken*

In our survey we defined a *ken* as “a group or network of people with a specific goal or purpose that you created or joined or that was spontaneously formed by people at a particular place to experience something together.” We asked respondents if they had such a *ken*, and found that close to one in two (46.7%) did. The average number of *ken* per person was 2.6.

Ken possession

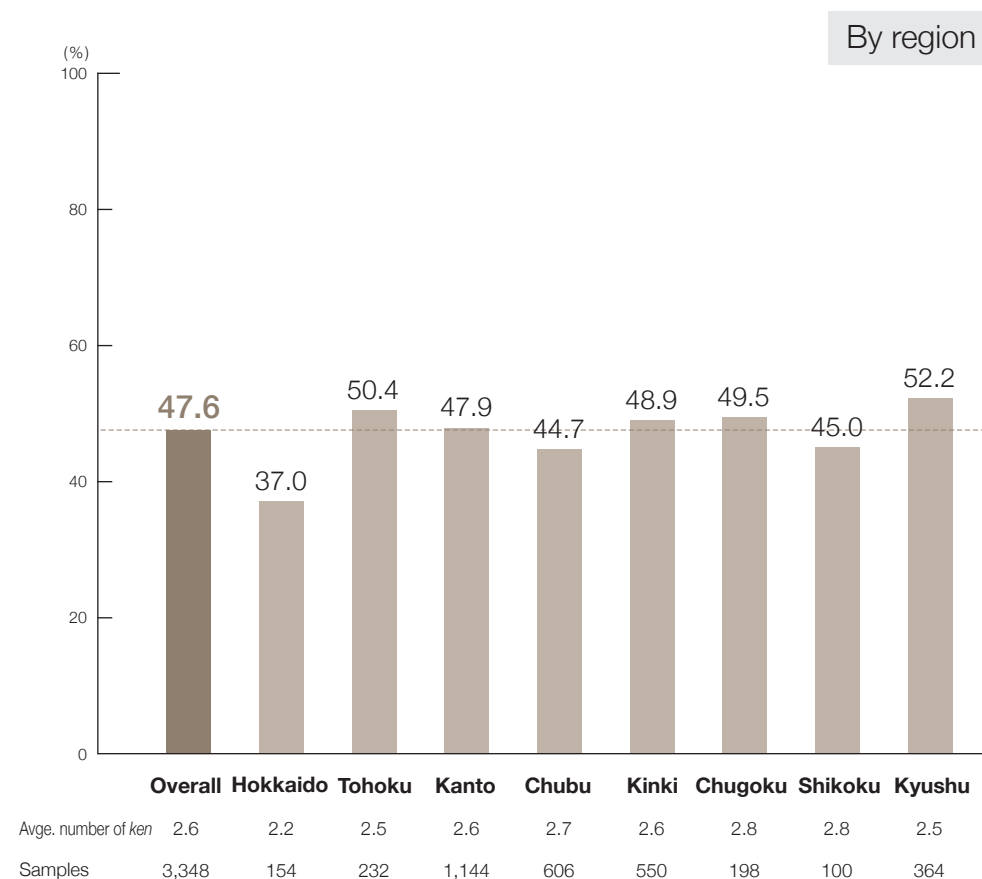
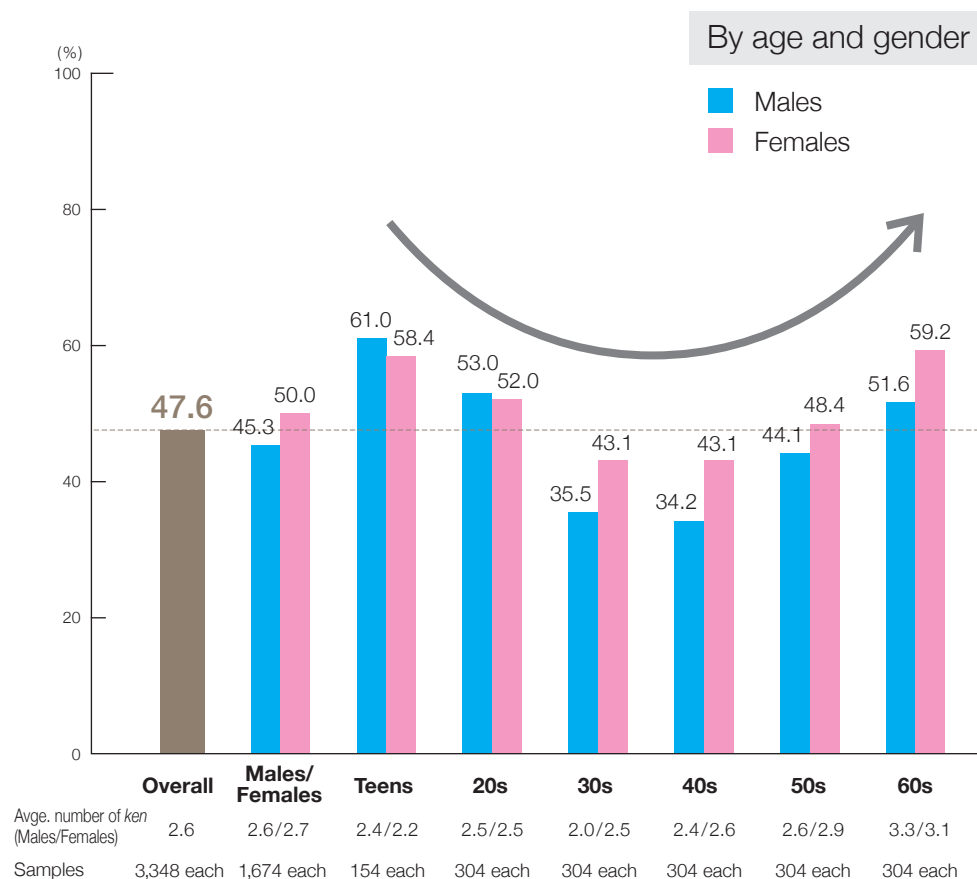
Q. Do you have a group or network of people with a specific goal or purpose that you created or joined or that was spontaneously formed by people at a particular place to experience something together?



Basic Data ② By age group, *ken* possession follows a U-curve for both males and females

For both men and women, possession of *ken* is highest in the teens, 20s, and 60s cohorts; those in their 30s and 40s form the low point of a U-curve. By gender, women's possession is 5 points higher than men's, a trend especially noticeable amongst those in their 30s, 40s, and 60s. The 60s cohort have a noticeably higher average number of *ken*: men have 3.3 and women 3.1. By region, the proportion of people who have *ken* varies little, except in Hokkaido.

Ken possession by age and region

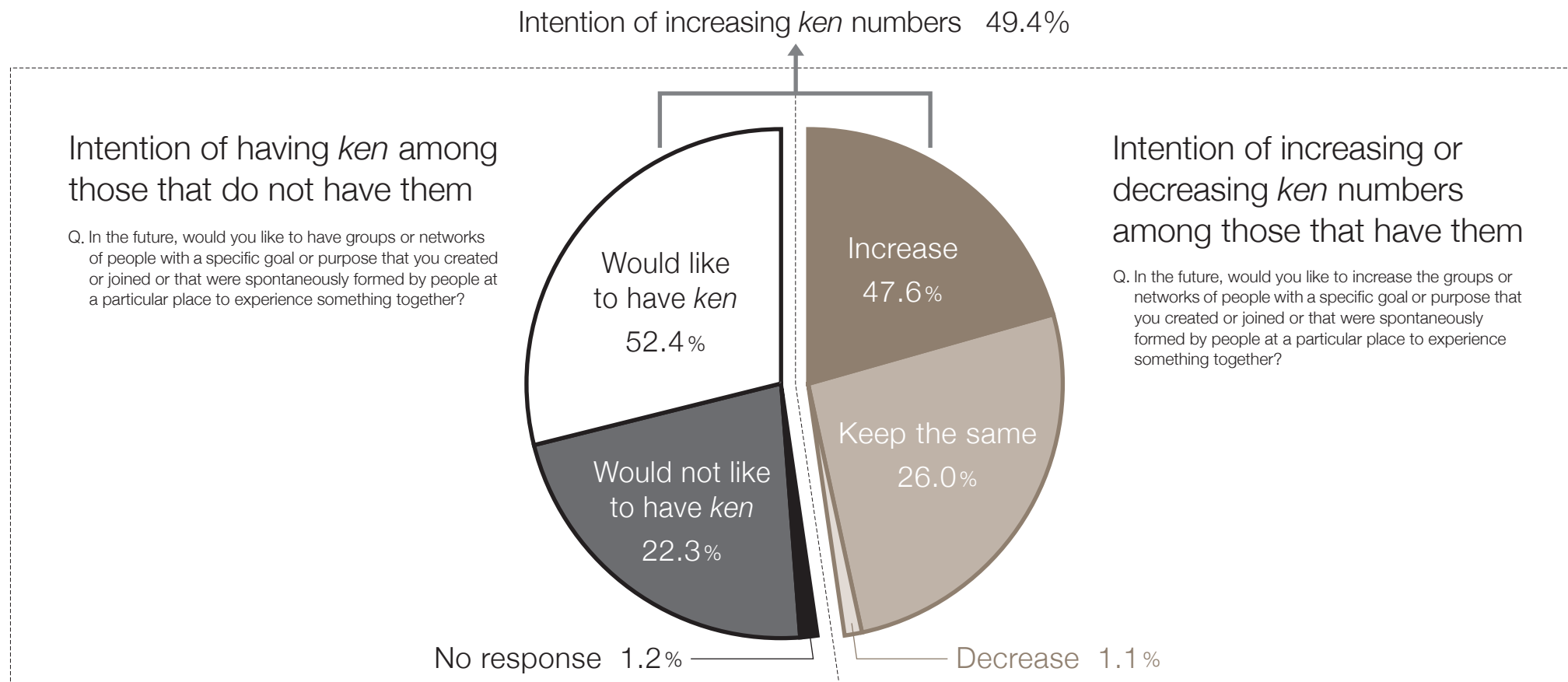


Basic Data ③ One in two wants to have or increase their *ken*

Of those that have *ken*, 20.5% want to increase their number. 28.9% of those that do not have *ken* reported a desire to have them. In total, 49.4% of people want to increase or have *ken*. That is close to one in two.

Intention of having or increasing *ken*

Although different questions were put to those with and without *ken*, the following figures are calculated on an overall basis.

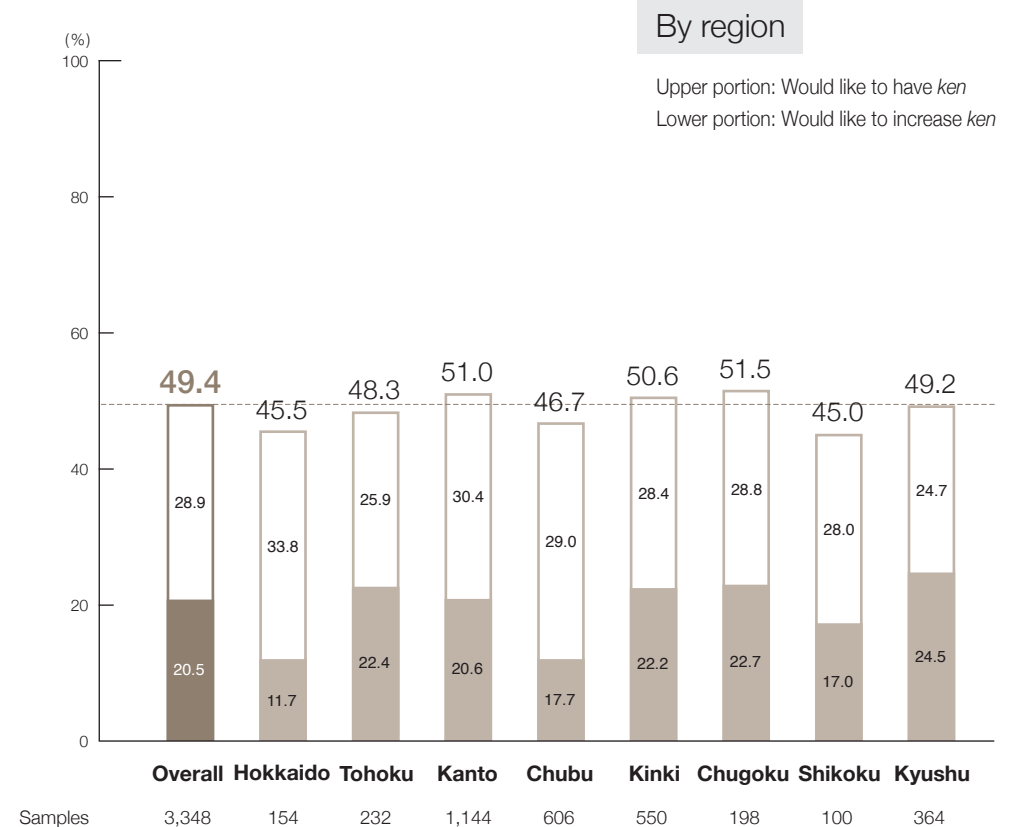
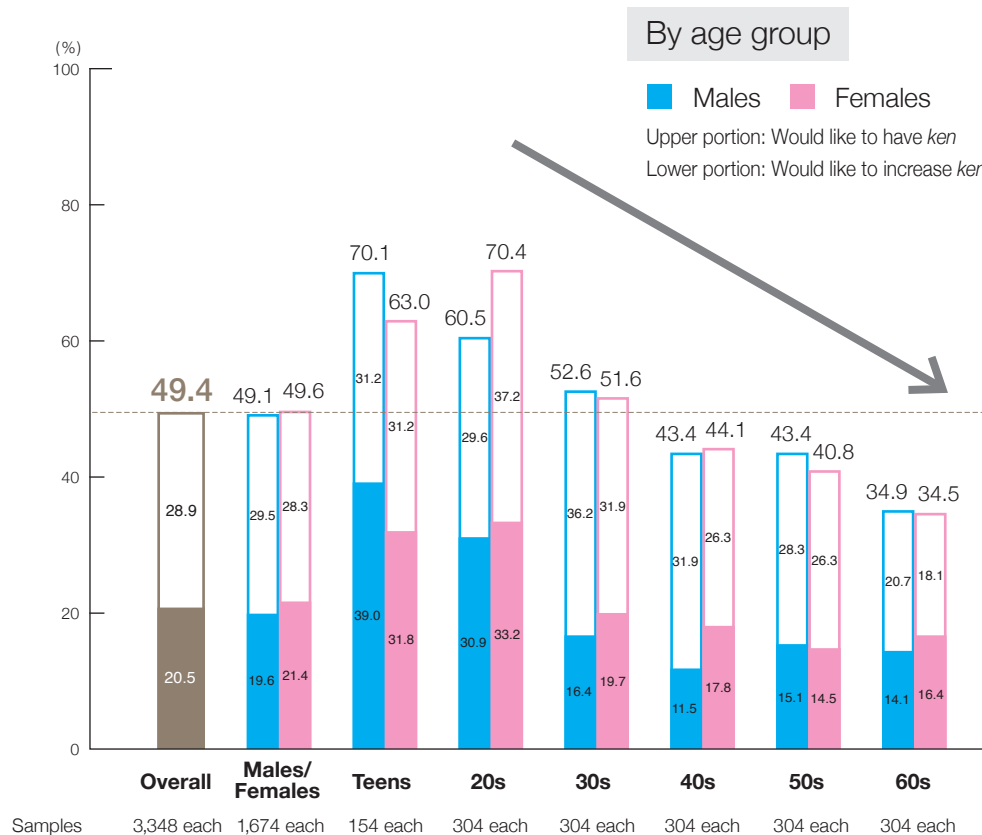


Basic Data ④ The desire to increase or have *ken* is high among the young and low among the old

Among both men and women, around 50% want to either increase or have *ken*. By age group, this is highest in the teens and 20s, which are in the 60–70% range. The desire to increase *ken*, in particular is high in these groups: over 30% for both men and women, and close to double the scores of the other age groups. The desire to increase or have *ken* decreases with age in a young-high/old-low pattern. By region there are no real differences.

Desire to increase or have *ken* by age group and region

Desire to increase/have *ken* is the total of the figures for would like to increase *ken* (for those that have them) and would like to have *ken* (those that do not)



Characteristics of *ken*

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| 5. <i>Ken</i> generate active consumption | PAGE 13 |

Profile of people who have *ken*

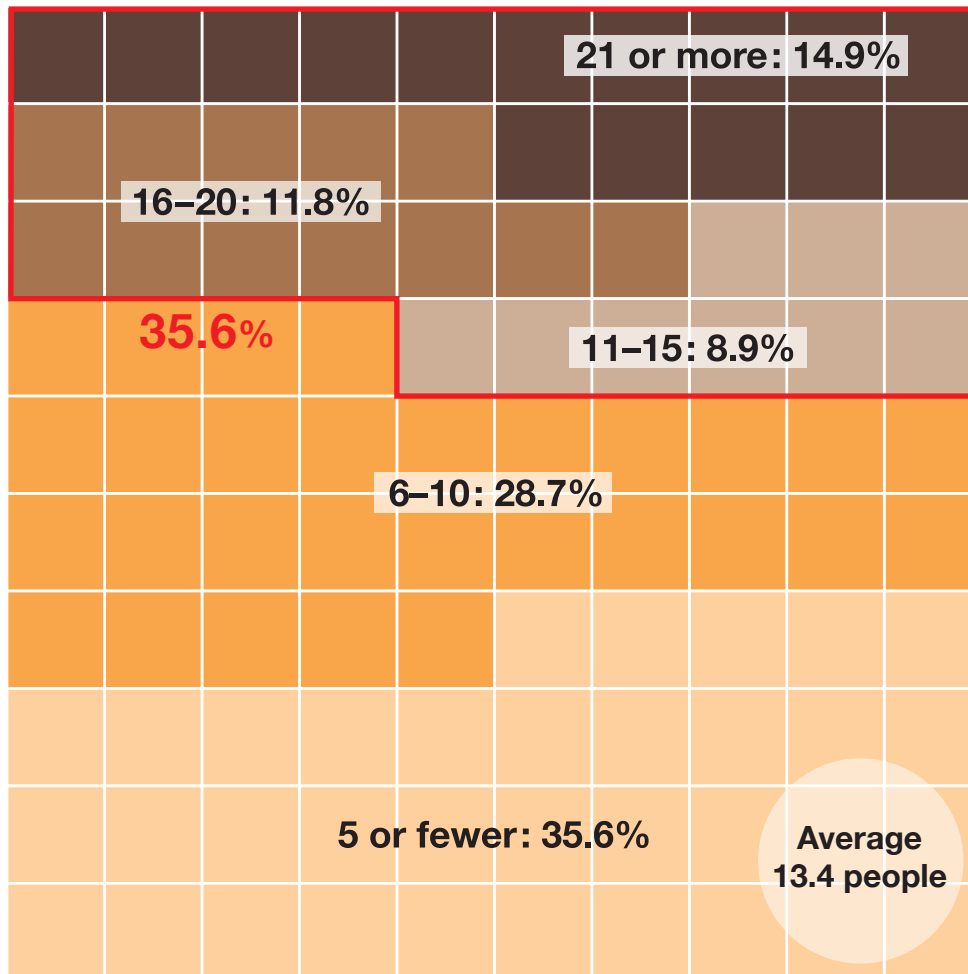
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|---|---------|
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Characteristics of *ken*

Characteristics of *ken*_1 **Ken are gatherings of an average of 13.4 widely varied people**

On average, each *ken* is comprised of 13.4 people. Over 30% of *ken* have 11 or more members.

Q. How many people does your *ken* comprise?



n=2,978

Many *ken* are comprised of people of both sexes, and various ages and regions.

Q. Describe the gender, age, place of residence and other characteristics of the members of your *ken*.

The youngest is in their teens, the oldest in their 40s. They live around Japan, and there are some in Korea. Gender is mixed, too.

(Male, 23, Kumamoto Pref., Net game community)

We are from all over Japan, and aged from primary school to elderly.

(Male, 25, Shizuoka Pref., group of people with IQs in the top 2%)

40s–60s; Miyagi, Saitama, Tokyo, Yamaguchi, Nagano and other places nationwide.

(Female, 48, Nagano Pref., fan club of a favorite artist)

Men and women, aged 40–80.

(Female, 61, Ehime Pref., group of people with similar medical issues)

Males and females aged 18–85.

(Male, 53, Tokyo, investment study group)

Males and females who live from Tokyo to Kyushu.

(Male, 31, Fukuoka Pref., group of people looking to live in Vancouver)

Characteristics of *ken* 2 **Ken have diverse purposes**

Ken have widely ranging purposes, from serious to casual, regardless of age and gender.

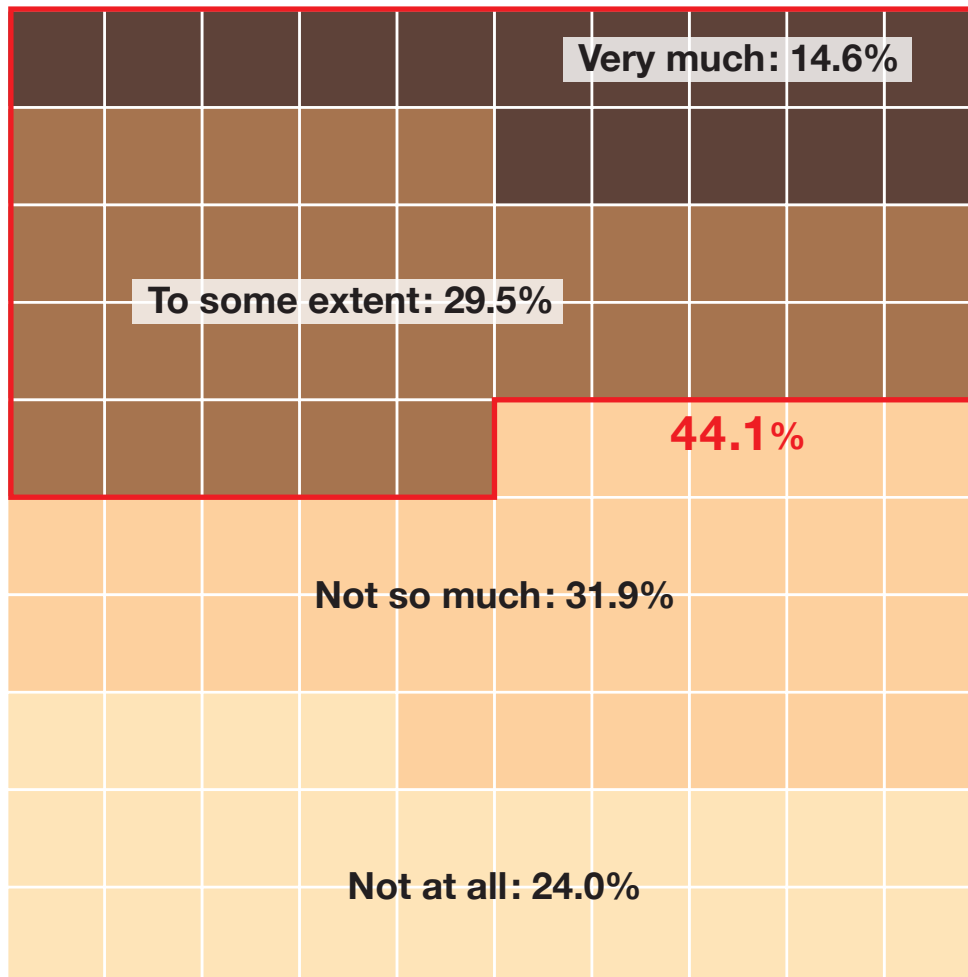
Q. What is your *ken* s purpose or goal and what does it do?

	Serious purposes/goals	Casual purposes/goals
Teens–20s	<p>Group of university students looking to land jobs Discussion/exchange of opinions on our dreams and goals. (Male, 20, Kanagawa Pref.)</p> <p>Youth perceptions survey group We give opinions about problems and trends in modern society. (Female, 25, Tokyo)</p>	<p>Calorie group We're a group of high-school girls who eat nothing but high-calorie foods. (Female, 18, Aichi Pref.)</p> <p>A group of anime enthusiasts in our city Around 15 guys aged 20–35 who get together to talk about different works and get to know each other. (Male, 27, Fukuoka Pref.)</p>
30s–40s	<p>Woodland regeneration group We are men and women aged 20s–50s who aim to restore traditional old houses and terraced rice paddies and otherwise revitalize the region. (Female, 38, Osaka Pref.)</p> <p>Renewable energy promotion NPO volunteers Events and member recruitment drives to promote the popularization of solar and other renewable energy sources. (Male, 48, Aichi Pref.)</p>	<p>Magic group We aim to improve our magic skills while experiencing the joy of magic. (Male, 38, Hyogo Pref.)</p> <p>Horseracing club We predict horse races, have fun winning and have parties to celebrate wins. (Male, 40, Tokyo)</p>
50s–60s	<p>Volunteers at a nursing home A group that folds and delivers laundry to rooms and does other tasks housewives can do. (Female, 57, Tokyo)</p> <p>“Space killifish” breeding group We try to breed killifish exclusively among those that traveled around the Earth 236 times in the space shuttle. (Male, 63, Kyoto Pref.)</p>	<p>Mini 4WD model club We exchange info on technology advances and compete against each other in order to win competitions. (Male, 53, Osaka Pref.)</p> <p>Harley (tandem) riders group We're a group of Harley fans that ride together. We post videos of our rides on the Web. (Female, 64, Kanagawa Pref.)</p>

Characteristics of *ken*_3 **Ken draw on the talents of over 40%**

For more than 40% with *ken*, their talents and specializations are put to good use.

Q. To what degree are your talents, skills and work specializations utilized in your *ken*?



n=3,126 Those that have *ken*: all *ken*

Members use a wide variety of talents and resources, from abilities to personality to work skills.

Q. What talents, skills or specializations are utilized in your *ken*?

I'm in charge of the intricate parts of our handicrafts because I have dexterous fingers.

(Female, 43, Kanagawa Pref.)

My talent as an initiator and mood-maker is put to use.

(Female, 21, Osaka Pref.)

I use my rich travel experience to plan recreational activities that maximize cost performance.

(Male, 63, Chiba Pref.)

I decide dates and plan events using my skills in negotiation, research and summarizing.

(Female, 48, Nagano Pref.)

I'm good at reading maps, so I show everyone the way when they get lost.

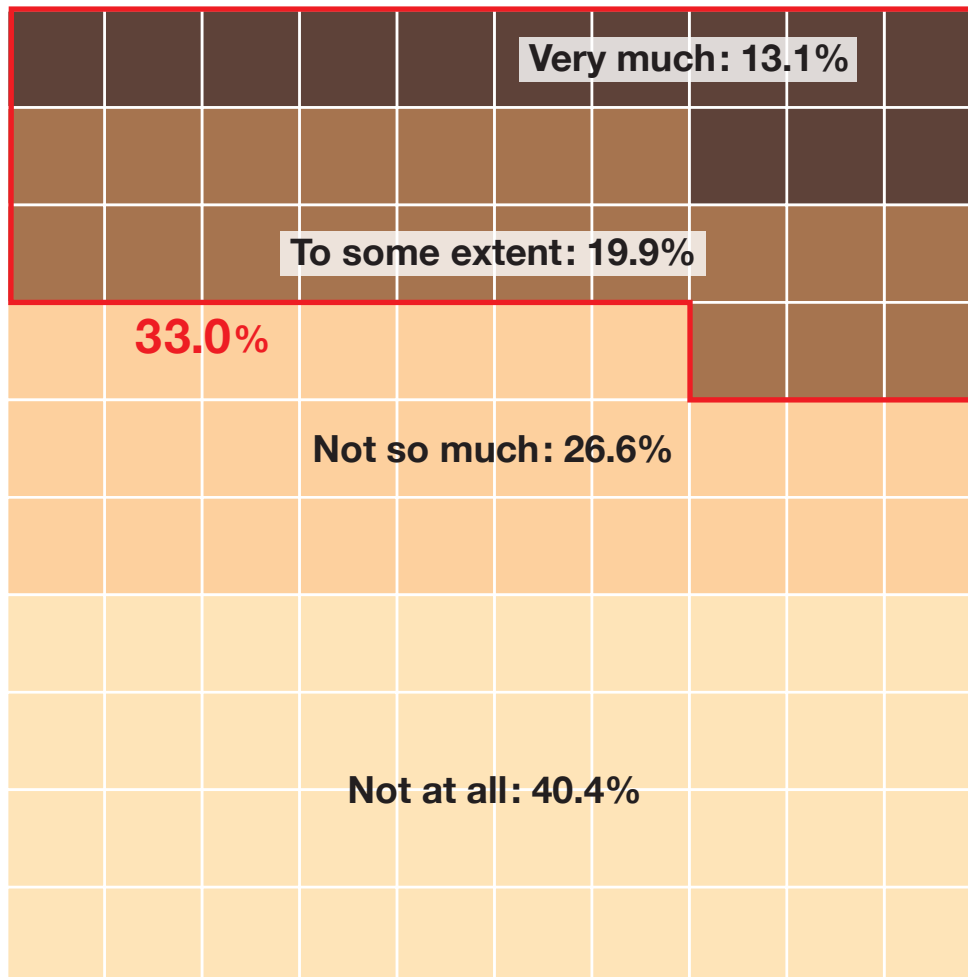
I love trivia, so I sometimes use this knowledge, too.

(Male, 23, Ibaraki Pref.)

Characteristics of *ken*_4 **Ken entail the use of Internet services for 30%**

More than 30% of those with *ken* use some kind of Internet service.

Q. To what extent do you use the Internet (Facebook, Twitter, Mixi, mailing lists, etc.) in your *ken*?



n=3,126 Those that have *ken*: all *ken*

Regardless of age or gender, all kinds of Net services are used for communication between *ken* members.

Q. How do you use the Internet (Facebook, Twitter, Mixi, mailing lists, etc.) in your *ken*?

The students group I belong to has a mailing list of over 800 people around Japan, so I post information on our meetings and events there.
(Female, 18, Tokyo)

We communicate via SNS, Twitter, Skype and the like.
(Male, 31, Hyogo Pref.)

We collect information on the Net on how to make knick-knacks to sell at the kindergarten bazaar.
(Female, 37, Osaka Pref.)

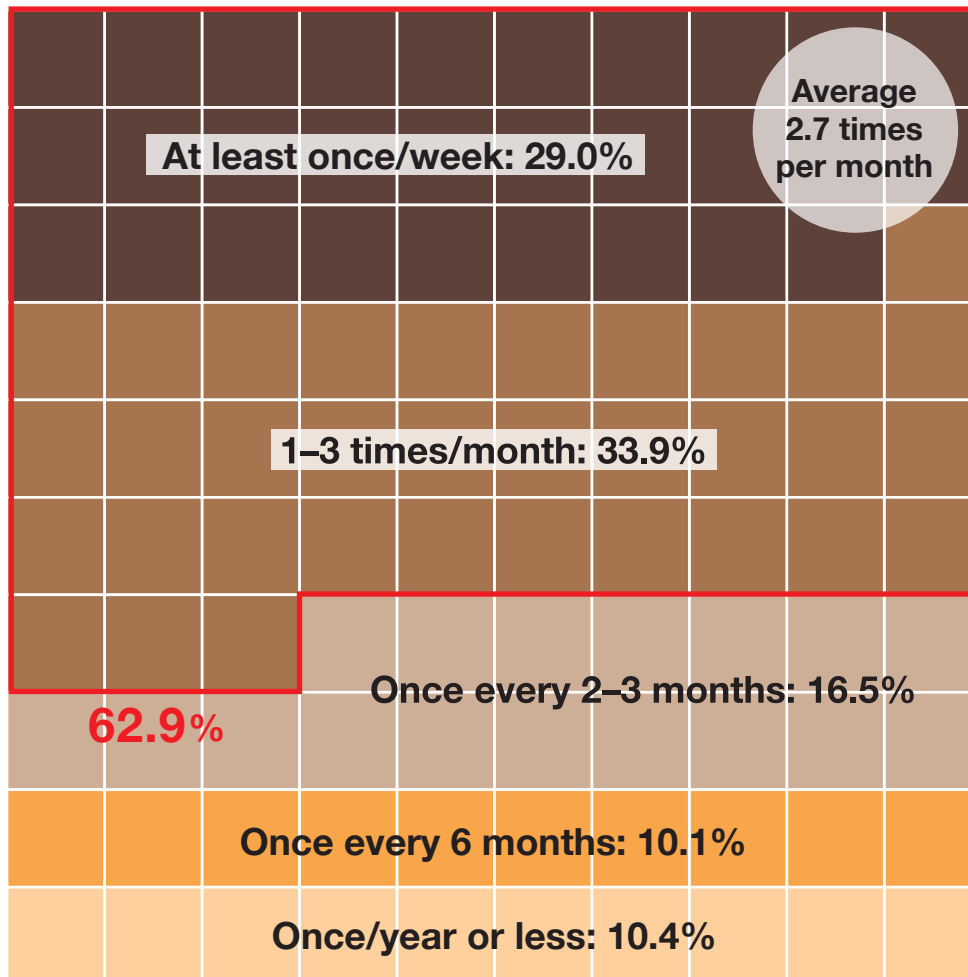
We look for people to go to our favorite artist's concerts with and arrange offline meetings via blogs and community sites.
(Female, 43, Tokyo)

As soon as we decide which mountain to climb, we thoroughly research hot springs, tourist spots, etc. on our way on the Internet.
(Male, 60, Fukushima Pref.)

Characteristics of *ken*_5 **Ken** generate active consumption

On average, people participate in their *ken* 2.7 times per month. *Ken* involvement is quite high; for around 30% it is at least once per week and for over 60% it is at least once per month.

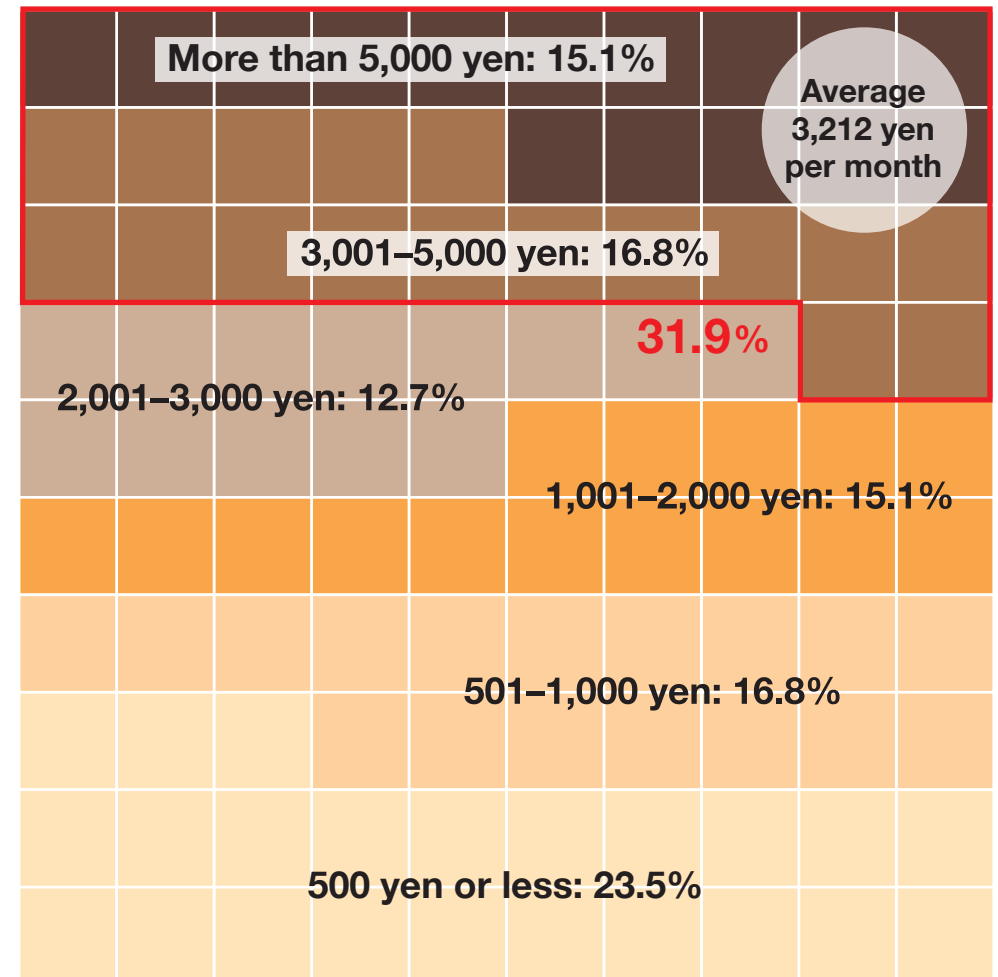
Q. How frequent is your participation in your *ken*?



n=3,126 Those that have *ken*: all *ken*

The average spend per *ken* per month is 3,212 yen. More than 30% have *ken* on which they spend 3,000 yen or more per month.

Q. About how much do you spend on your *ken* when calculated per month?

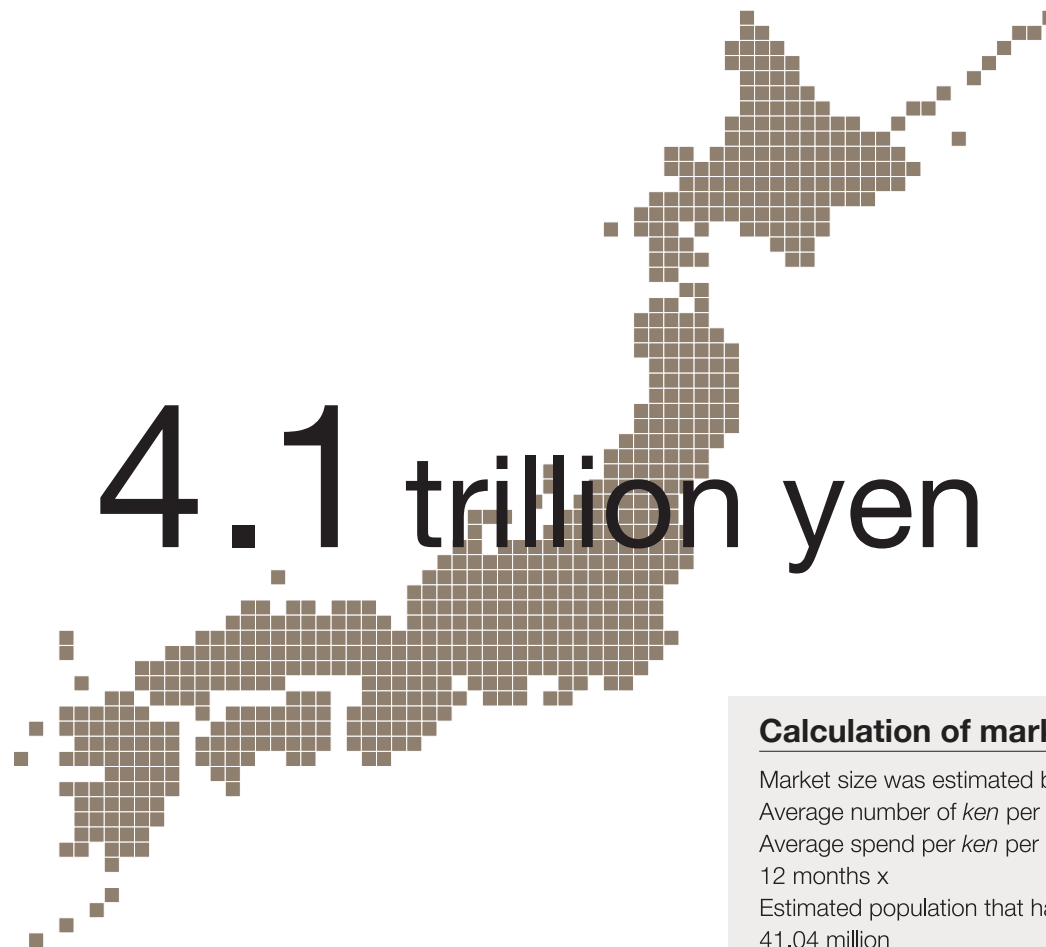


n=3,007

Reference ***Ken*-related spending is worth 4.1 trillion yen per year**

Those that have them have an average of 2.6 *ken* and spend an average of 3,212 yen per month per *ken*, thus each is spending an average of 8,351 yen per month, or 100,214 per year, on their *ken*.

Extrapolating this to the estimated 41.04 million Japanese people aged 15–69 who have *ken*, the estimated market size is around 4.1 trillion yen.



Calculation of market size

Market size was estimated by multiplying

Average number of *ken* per person: 2.6 x

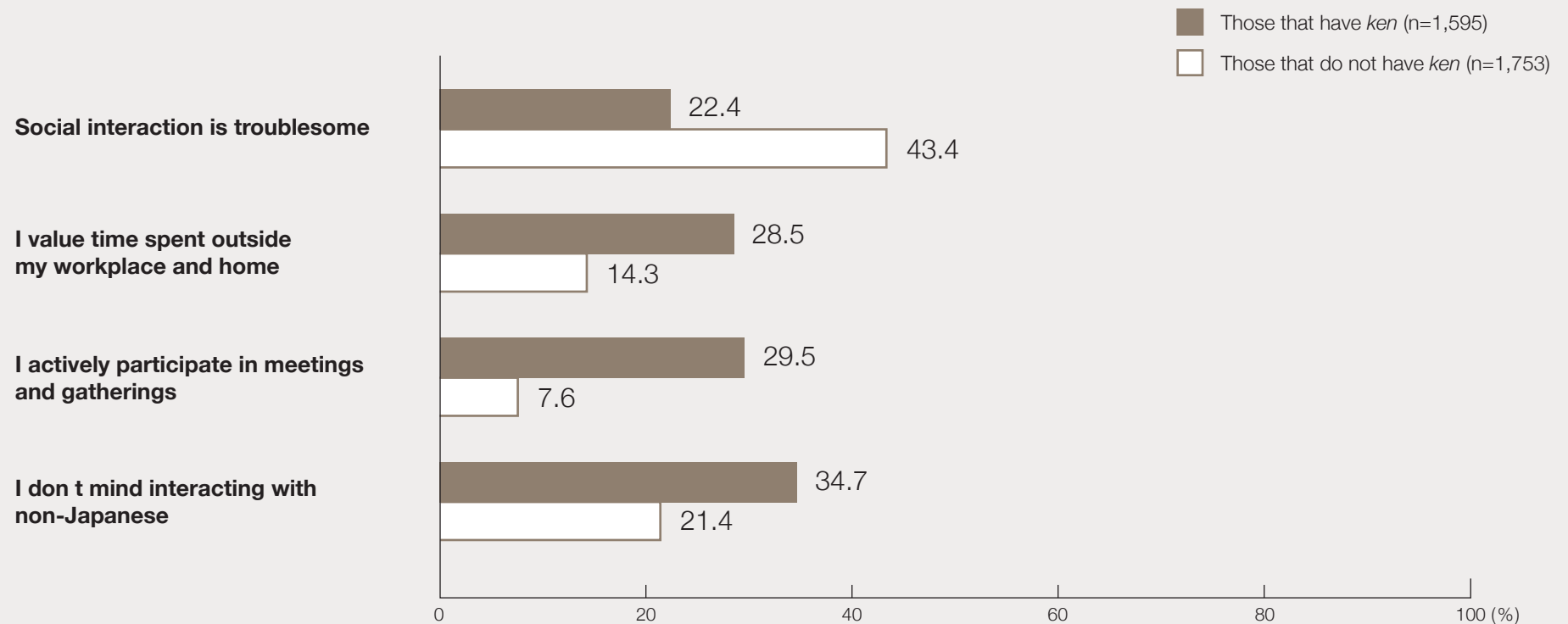
Average spend per *ken* per month: 3,212 yen x
12 months x

Estimated population that have *ken* (15–69 population x participation rate):
41.04 million

Profile of people who have *ken*

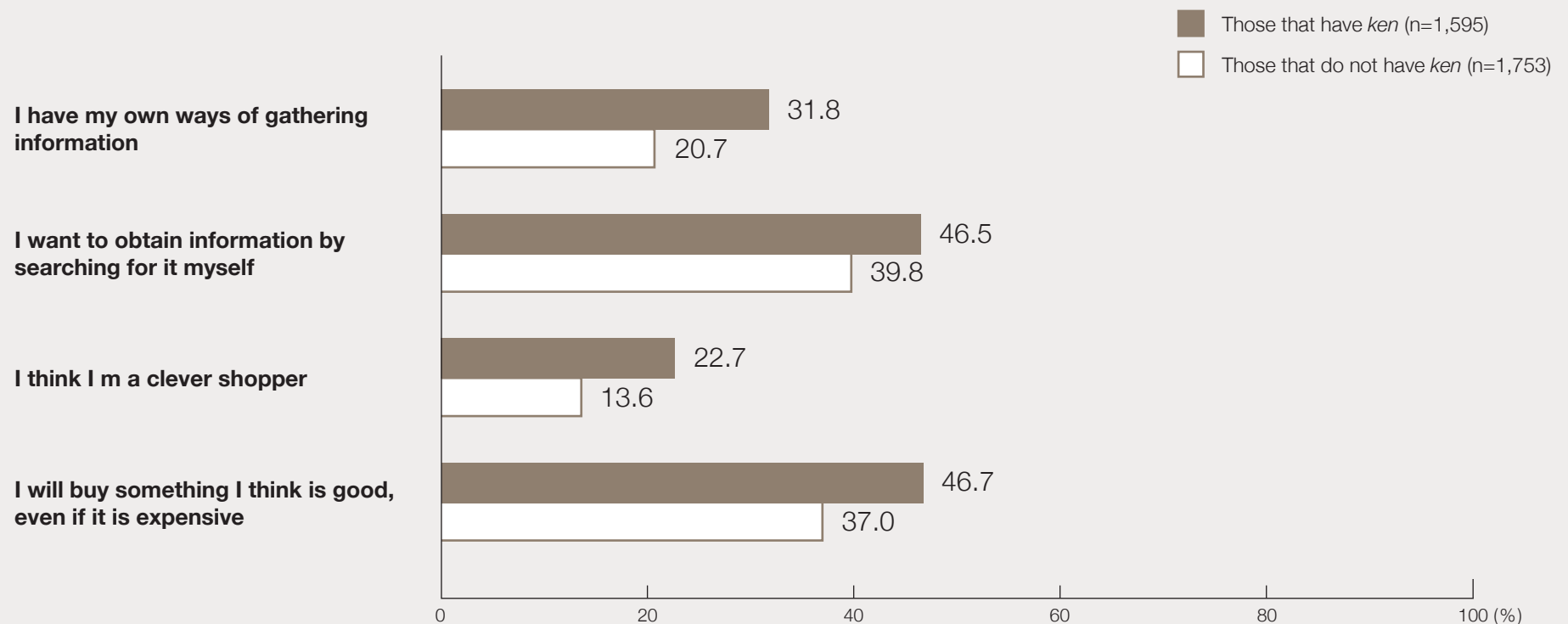
Profile of people who have *ken*_1 **Those that have *ken* mix easily with anyone**

People that have *ken* do not see interacting with others as troublesome. They value time outside the workplace and home, and happily make time to participate in their *ken*. National boundaries are no barrier, and they do not hesitate to mix with non-Japanese.



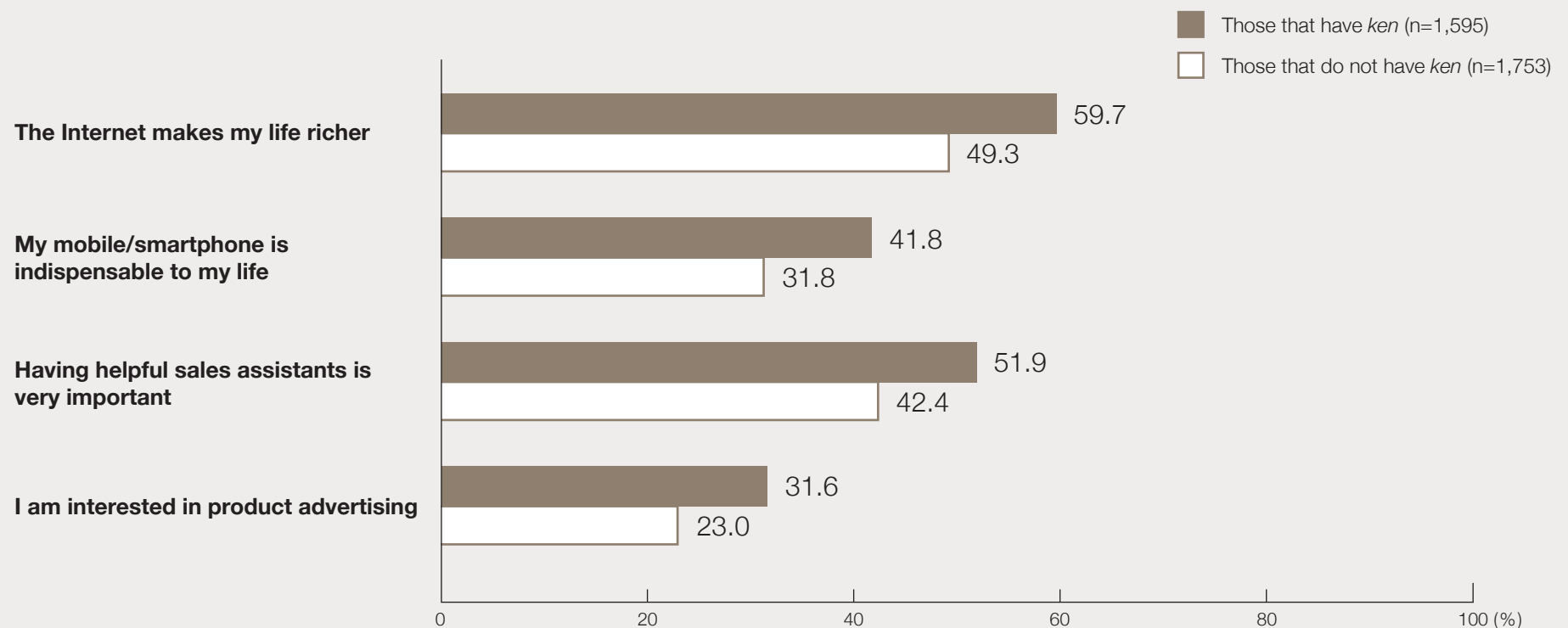
Profile of people who have *ken*_2 Those that have *ken* are clever selectors

People who have *ken* have their own ways of gathering information on which to base their decision-making. Once they've decided on something, they do not hesitate to buy it, even if it is expensive.



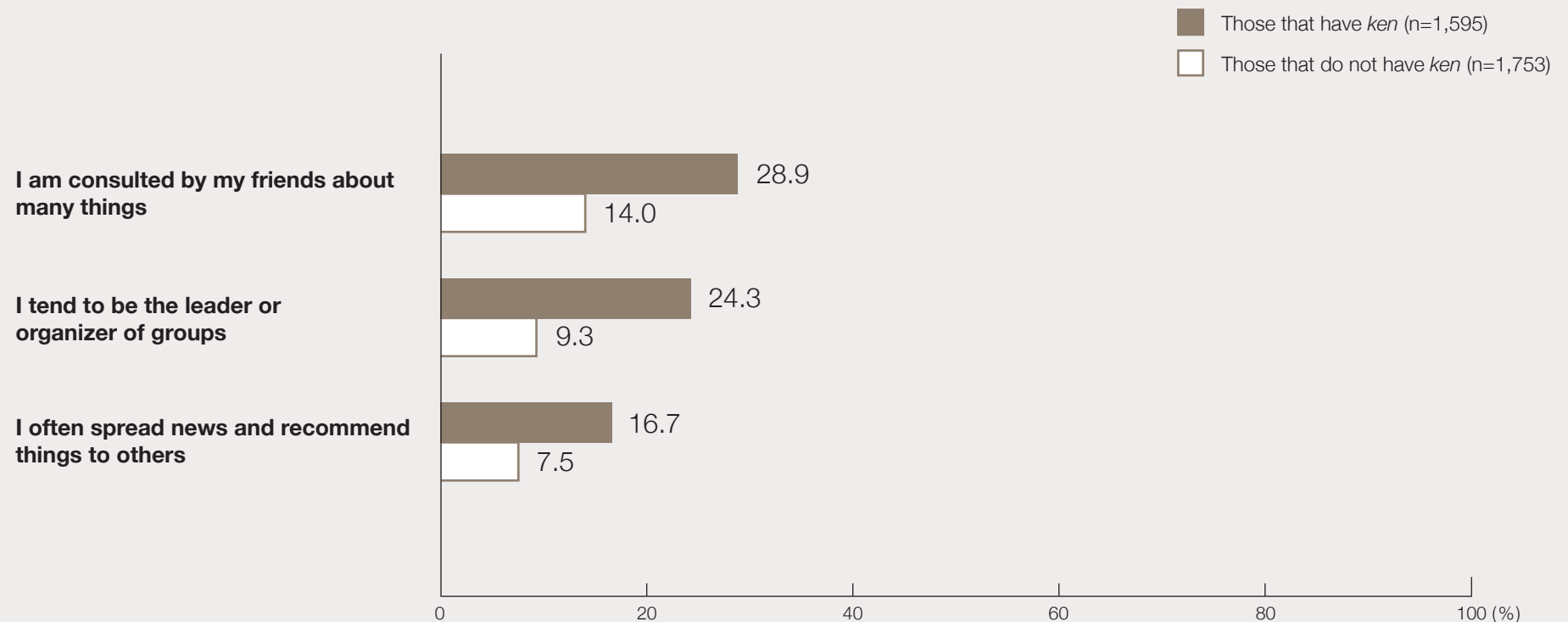
Profile of people who have *ken*_3 Those that have *ken* are users of multiple channels

People who have *ken* pay attention not just information from the Internet and their mobile/smartphone; they also value helpful salespeople, product ads and other real and mass media information. To make the right decisions, they use information from a variety of different sources.



Profile of people who have *ken*_4 Those that have *ken* attract others and spread news

People that participate in *ken* attract others; they are often consulted by friends and are good at organizing groups. This makes them good at spreading news and recommending things to others.



Those that have *ken* have confidence in their own abilities and gain confidence from belonging

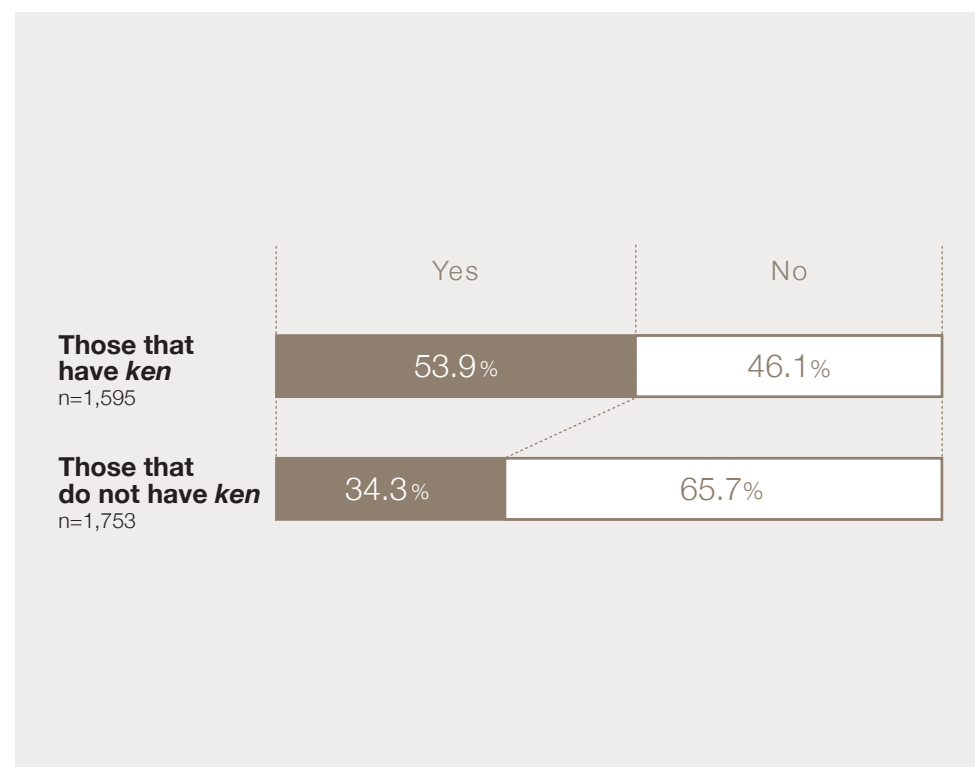
People who have *ken* are confident in themselves and gain confidence from belonging to a group or network. This confidence seems to come from moving ahead with the support of others, while still maintaining their independence.

Original HILL scales

- Confidence in own abilities** Confidence from one's knowledge, physical strength, wealth, work and home skills, social influence, etc.
- Confidence as a result of belonging** Confidence from belonging to a place of work, family, club, community, country, etc.

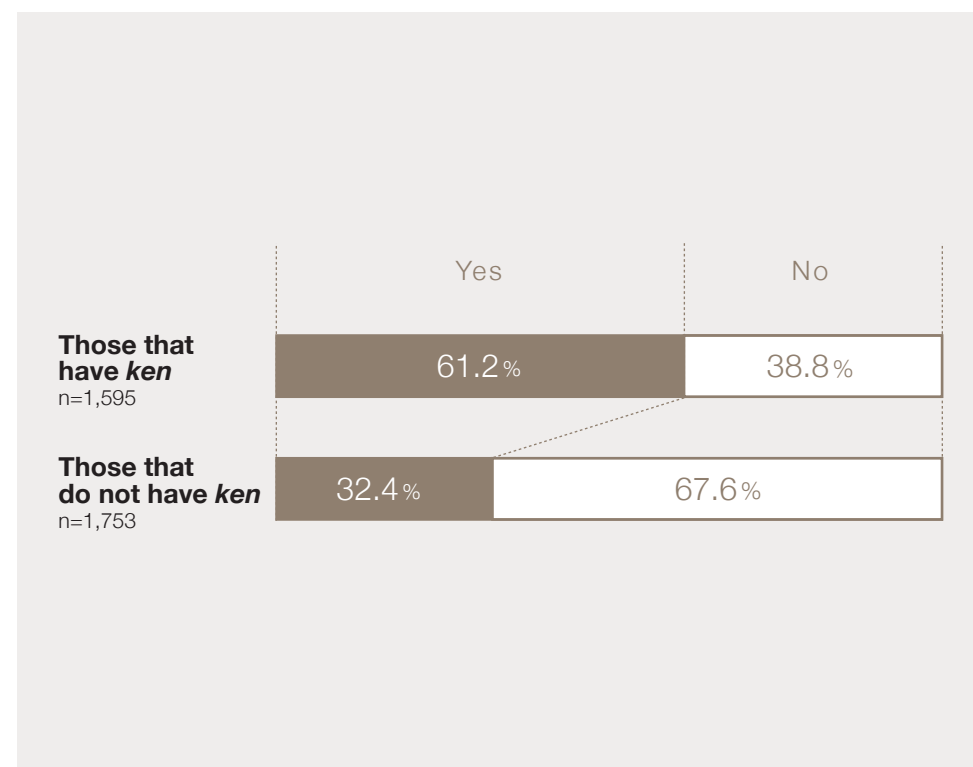
Confidence in own abilities

Q. Do you currently have confidence in your own abilities?



Confidence as a result of belonging

Q. Do you currently have confidence from belonging to a group or network?



Profile of people who have *ken*_6

Those that have *ken* gain happiness from the energy created by their *ken*

People who have *ken* undertake sensible, realistic actions toward the *ken*'s purpose or goal, giving them great energy. This appears to make them happy and make their lives more positive.

Energy derived from *ken*

Q. Fill in the blank to complete the following sentence. "I gain [] energy from my (valuable groups and networks*)"

* On-screen question shows the groups and networks that the respondent gave in an earlier question.

Ken purpose

Revitalizing our community

Discussing what it means to be happy as a woman

Increasing children's interest in science

Thinking about how to use our intellects to the fullest

Learning about Korean culture

Altruistic actions for *ken*

Various activities at the residents' association

Sleepovers at friends' houses

Conveying my passion for work in the space field to the next generation

Gatherings for fortune-telling and puzzles

Korean study group

Energy derived from *ken*

I gain great energy from day-to-day peace of mind even though global disputes are never-ending (Male, 63, Shimane Pref.)

I gain the energy I need as a woman (Female, 24, Osaka Pref.)

I gain the energy I need to review myself (Male, 39, Ibaraki Pref.)

I gain energy like a medicine for the intellect (Male, 23, Kumamoto Pref.)

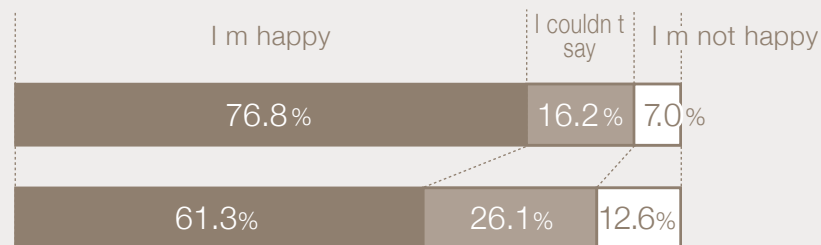
I gain the vigor I need to live (Female, 65, Nagano Pref.)

Degree of happiness

Q. To what degree do you consider yourself happy?

Those that have *ken*
n=1,595

Those that do not have *ken*
n=1,753



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