

【JCCIプレゼンテーション】
ASEAN市場-拡大する中間層の
消費パワーとその実態
**ASEAN Market -The Expanding
Consumption Power of
the Middle Class.**



濱野 英和（はまの ひでかず）

Kadence International (Thailand) Co., Ltd.

Managing Director

Global Account Director

1973年生まれ。

2016年、クロス・マーケティング グループに入社し、タイ・バンコクに渡りCross Marketing Thailandの事業を開始。

2019年Kadence Internationalに社名を変更。現在に至る。

主に日系企業を対象にタイ及び周辺国における各種マーケティングリサーチ活動の支援を行い、商品開発やコミュニケーションプラン策定など幅広い分野のプロジェクトを100以上担当。

2024年、Kadence International Global Account Directorとして活動エリアを拡大。



【オンライン名刺】

日本最大級のパネルネットワークをフル活用し、
デジタルの力でお客様のマーケティングプロセスをトータルにご支援する
マーケティングDXパートナー

日本最大級の
パネルネットワークによる
効率的な生活者のFact Finding

Fact Findingに基づく生活者
インサイトの分析・理解による
課題解決コンサルティング

詳細な生活者データを活用した
「データ」と「顧客理解」に基づく
正確で最適なプロモーション実行支援

データマーケティング事業

インサイト事業

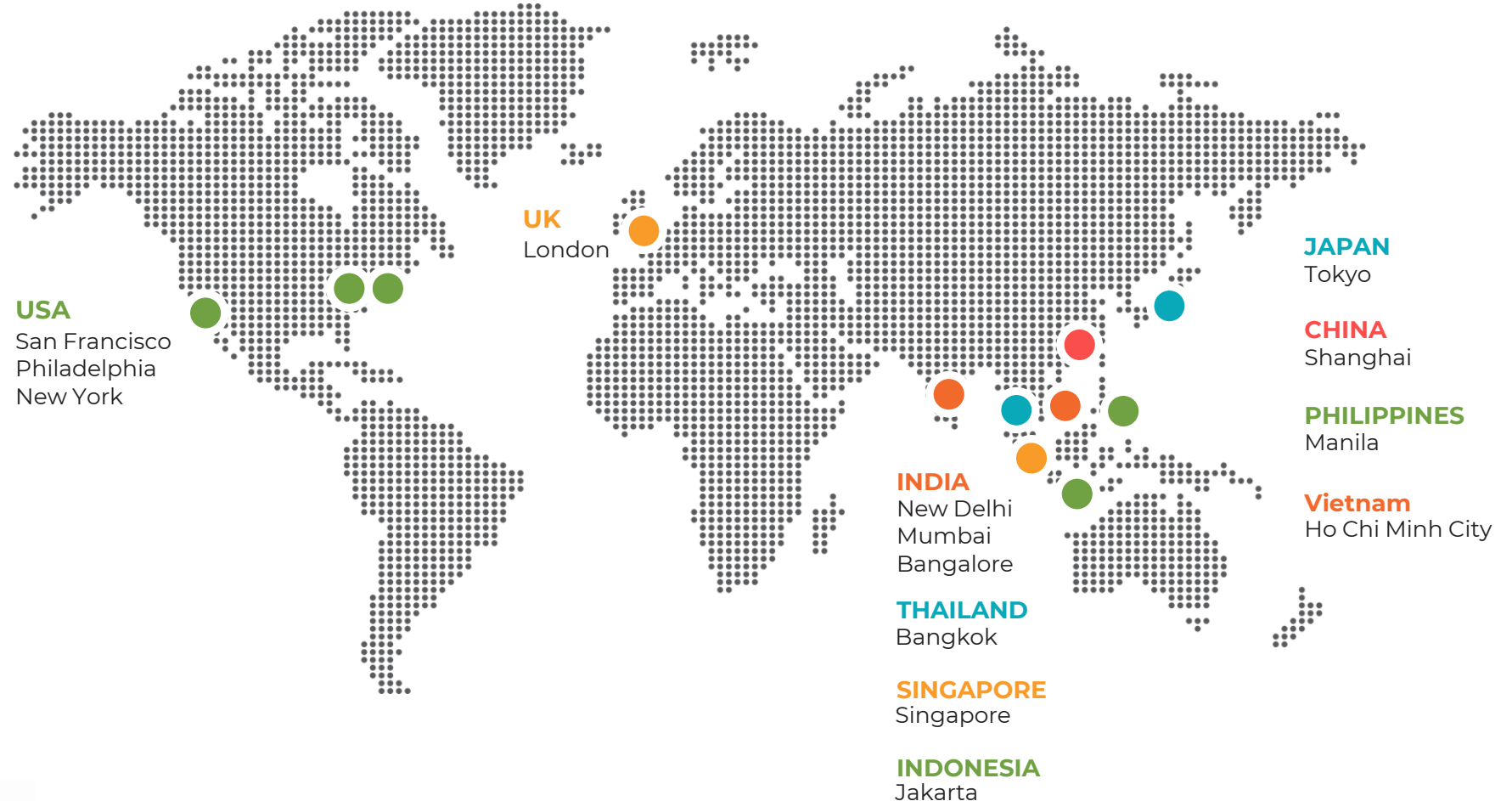
デジタルマーケティング事業



We're recognized as a leading global market research agency.

Kadence International is a worldwide market research agency with a distinctly local feel. While our capabilities are global, your experience is radically personal. After all, your customers don't fit in a box, and your approach to research shouldn't either.

INDUSTRY AWARDS AND NOMINATIONS



Our global footprint makes us the go-to partner for international research.

<p>30+ Years of global knowledge</p> 	<p>15+ Years of Asian experience</p> 	<p>1000+ Employees across the globe</p> 
<p>10 Countries</p> 	<p>14 Offices</p> 	<p>40+ Languages</p> 

- Thanks to our global network, we have an unrivalled understanding of the cultural nuances that need to be considered as part of any global research project.
- We take quality control and data privacy compliance seriously. From navigating local data protection legislation to interpreting research findings through a cultural lens, we've got it covered.



Our core research team and support teams deliver a seamless experience.



Derek Goh
Country Manager

Derek's expertise in qualitative research is coupled with his perceptive capabilities to get to the heart of a business issue, quickly determining how consumer insights can help companies thrive against their competitors. His perspectives on Asian consumers have allowed clients to glean in-depth understanding of their wants and needs, ensuring the relevance and interest of their products and services.



Nikitha Rathna
Operations Director

Nikitha is proficient in project processes and brings in efficiency for smooth project execution. Managing quantitative large complex and qualitative multi-market studies are a highlight of her expertise. Vendor management and ensuring the right cost is her forte. Her experience helps in foreseeing the challenges, increases client service standards and enforces high quality deliverables.



Juliet Warnock
Associate Director

Juliet specialises in quantitative research, working across multiple domains including brand strategy, brand lift, creative development, U&A, brand tracking and campaign evaluations. She has a strong background in analysis and story-telling; bringing insightful, actionable and attainable recommendations across all projects.



Shirley Wong
Associate Director

Shirley has mastered the art of qualitative research in her 20 years of practice. She knows how to design and conduct studies that reveal the hidden truths behind human behavior. She delivers insights that are not only meaningful and insightful, but also actionable and aligned with the goals of your business.



Hamano Hidekazu
Regional Account Director

Hide is passionate about helping B2B and B2C brands break into the ASEAN market. He has particular expertise in competitor intelligence research, using this to help brands understand the big picture and the market landscape so they can set themselves up for success globally.

Industry Research and Insight Expertise.

Industries.



Energy /
Oil & Gas



Automotive



Agriculture



Financial
Services



Media



Travel



Retail



Food &
Beverage

Research.



Competitive



Pricing



Segmentation



NPD



Brand &
Advertising



NPC &
C-SAT



Market
Entry



Strategic
Planning



今日お伝えしたいこと
東南アジアのポテンシャル。

拡大する中間層

消費する中間層

もっと消費する中間層



なぜ今 中間層なのか

1. USD10~100の日常消費

**2. 2030年頃には東南アジアの65%が
中間層になる見込み（3~4億人?）**

**3. その中間層の60%が35歳以下とい
う働き盛り**



Thailand Daily consumption Estimation

A Week day Total 440 THB (\$12)

60

Commute

BTS
Bike

60

Snack

Bread
Drink

@seven

80

Lunch

Local
Food

@food court

60

Coffee/Tea

Ice Black
Coffee

@Amazon

30

Snack

Fresh
Fruit

@Street

30

Snack

Local
Sweets

@Street

120

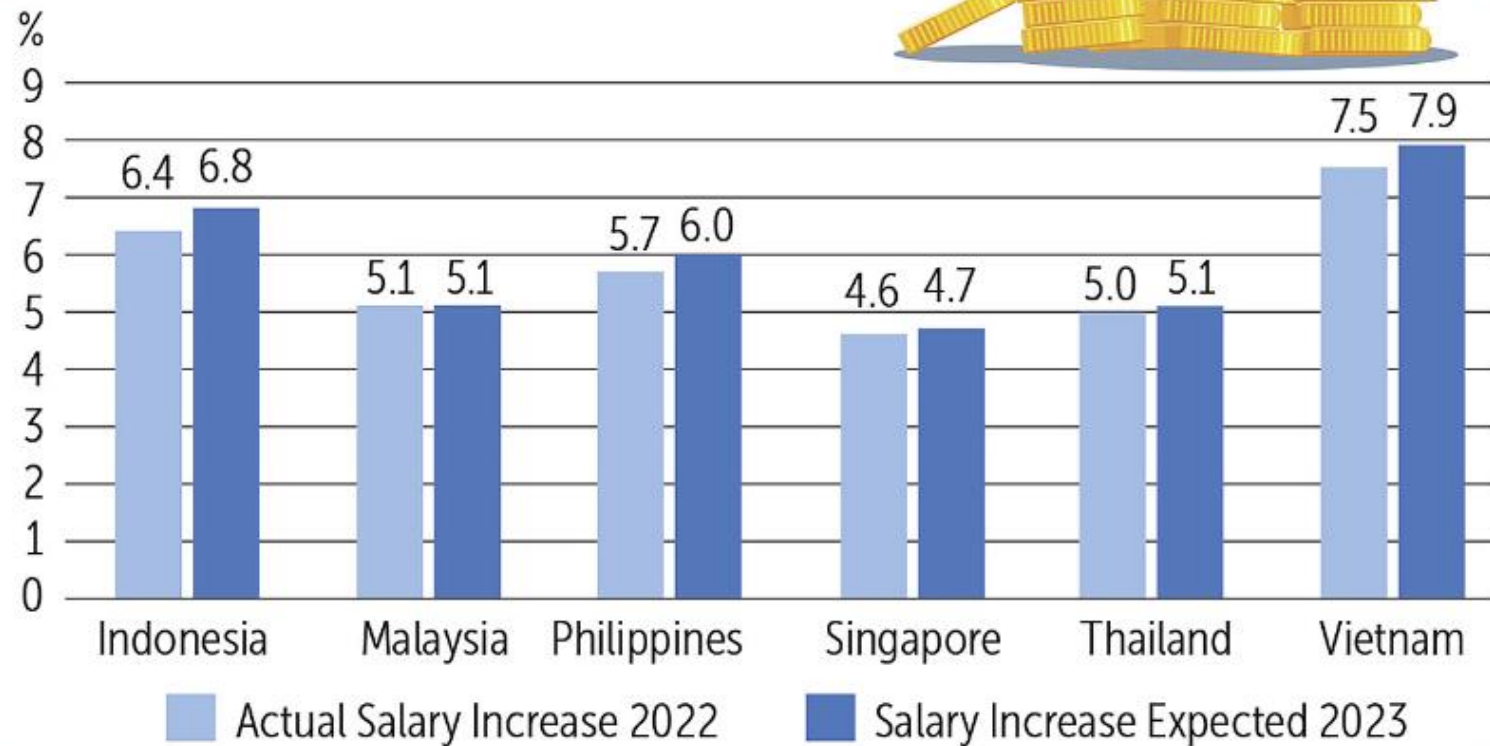
Dinner

Local
Food

@Delivery

GOING UP

Expected median increase in salary budgets
in 2023 vs actual increase in 2022



Source: Aon 2022 Salary Increase and Turnover Study, Southeast Asia

BANGKOKPOST GRAPHICS



Online Consumer Survey

5 Country

Age 20-29, male & female

Earning Personal Income

200 Samples each country

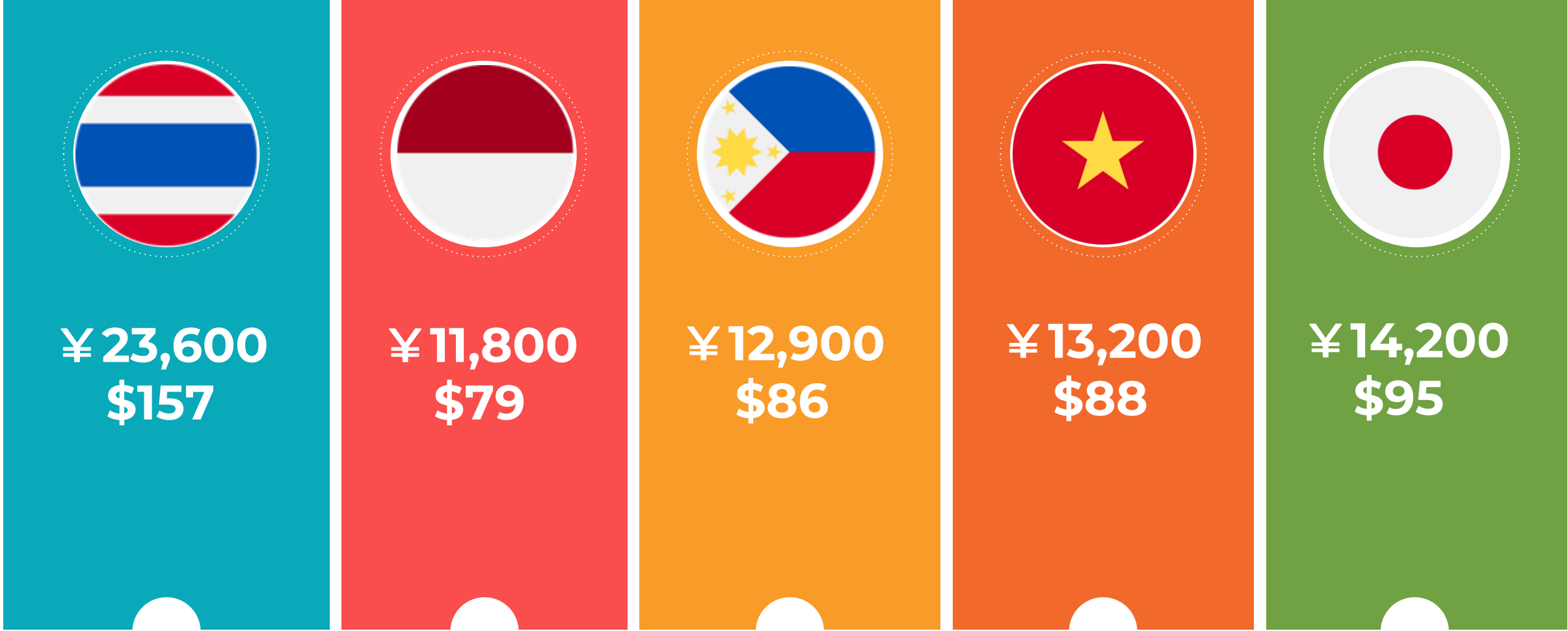
Total 1,000



Online Survey. Monthly Average Income (PI/HHI)



Online Survey. Monthly Average dining out/meal delivery and takeout



Online Survey. Consumption Ratio (PI)

Ave.

15.1%

12.4%

10.7%

10.9%

23.9%

Dining out
Delivery/ Takeout

Clothing

Beauty

Hobbies

Travel

6.1%

4.6%

4.1%

6.6%

6.4%

Online Survey. Attitude towards life (TOP 1 : Agree)

Ave.

71.1%

85.1%

44.6%

61.0%

56%

I am investing
in my skills

I want to advance
my career

I freely spend the
money

I would rather
save for the future

I prefer to spend
time with family
and friends

13.5%

22.5%

21.0%

21.0%

16.5%

Online Survey. Perception towards economy (TOP 1 : Agree)

Ave.

30.6%

40.0%

49.4%

55.1%

66.4%

I think the economy is doing well right now

I want to choose environmentally friendly products, even if they cost a little more

I think I'd be happier in life being married and with children, rather than being alone

I want to help as much as possible if my family or friends are in trouble

My life in 10 years will be better than it is now

5.5%

4.5%

11.5%

20.0%

9.5%



Middle Class Consumers

1. 国の経済成長
2. 教育や技術の機会
3. 雇用機会の拡大

X

- 安定的な収入
- 自己投資
- 将来への希望

感じてもらえましたか？
東南アジアのポテンシャル。

Thank you.

Hidekazu Hamano's Virtual Card



Scan this with
your smartphone

Kadence International
Hidekazu Hamano
Regional Account Director
hhamano@kadence.com