THE EXPANSION OF JAPANESE RESTAURANT INDUSTRY IN BANGKOK

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A Thesis Submitted in Partial Fulfillment of the Requirements
for the Degree of Master of Arts Program in Southeast Asian Studies
(Interdisciplinary Program)
Graduate School
Chulalongkorn University
Academic Year 2015

การขยายตัวของอุตสาหกรรมร้านอาหารญี่ปุ่นในกรุงเทพฯ

นางมิซูเอะ มิยาโมโตะ

วิทยานิพนธ์นี้เป็นส่วนหนึ่งของการศึกษาตามหลักสูตรปริญญาศิลปศาสตรมหาบัณฑิต

สาขาวิชาเอเชียตะวันออกเฉียงใต้ศึกษา (สหสาขาวิชา)

บัณฑิตวิทยาลัย จุฬาลงกรณ์มหาวิทยาลัย

ปีการศึกษา 2558

Thesis Title	THE EXPANSION OF JAPANESE RESTAURANT INDUSTRY IN BANGKOK
By	Mrs. Mizue Miyamoto
Field of Study	Southeast Asian Studies
Thesis Advisor	Professor Amara Prasithrathsint, Ph.D.

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มิซูเอะ มิยาโมโตะ : การขยายตัวของอุตสาหกรรมร้านอาหารญี่ปุ่นในกรุงเทพฯ (THE EXPANSION OF JAPANESE RESTAURANT INDUSTRY IN BANGKOK) อ.ที่ปรึกษาวิทยานิพนธ์หลัก: ศ. ดร. อมรา ประสิทธิ์รัฐสินธุ์, 108 หน้า.

เป็นที่สังเกตได้ว่าร้านอาหารญี่ปุ่นในกรุงเทพฯ มีจำนวนเพิ่มขึ้นอย่างรวดเร็วในทศวรรษที่แล้ว และยังไม่มีงานวิจัยใดที่อธิบายปรากฏการณ์ดังกล่าว ดังนั้น งานวิจัยนี้จึงมุ่งศึกษาปัจจัยต่างๆ ที่มีผลต่อการขยายตัวของอุตสาหกรรมร้านอาหารญี่ปุ่นในกรุงเทพฯ โดยมีสมมติฐานว่าสาเหตุของการขยายตัวดังกล่าว คือ การเปลี่ยนแปลงของชุมชนชาวญี่ปุ่นในกรุงเทพฯ และการเปลี่ยนแปลงของสังคมไทยเอง

ข้อมูลที่ใช้ในการวิเคราะห์ได้มาจากการสำรวจภาคสนาม การสัมภาษณ์บุคคลที่คัดเลือกแบบเจาะจง เว็บไซต์ต่างๆ และสถิติของทางราชการ ผลการวิเคราะห์ทั้งเชิงคุณภาพและเชิงปริมาณแสดงให้เห็นว่าร้านอาหารที่ให้บริการอาหารญี่ปุ่นแท้ๆ สำหรับคนญี่ปุ่นเท่านั้นมีจำนวนเพิ่มขึ้นเนื่องจากการขยายตัวของชุมชนชาวญี่ปุ่น ในขณะที่ร้านอาหารญี่ปุ่นสำหรับคนไทยก็ได้รับการบุกเบิกให้เจริญรุ่งเรืองขึ้น โดยกลุ่มร้านอาหารใหญ่ 4 กลุ่ม ได้แก่ ฟูจิ โออิชิ ฮะจิบัง และเซ็น ร้านอาหารญี่ปุ่นสำหรับคนไทยเหล่านี้เจริญเติบโตตั้งแต่ช่วงกลางของทศวรรษที่ 2000 ผลก็คือ ทุกวันนี้ร้านอาหารญี่ปุ่นทุกระดับได้แพร่ไปทั่วกรุงเทพฯ โดยเฉพาะอาหารประเภทซูชิ-ซาชิมิที่ดัดแปลงให้เข้ากับคนไทยเป็นที่นิยมมาก ผลการศึกษายังแสดงให้เห็นว่าการเปลี่ยนแปลงในสังคมไทยที่ทำให้เกิดการแผ่ขยายของร้านอาหารญี่ปุ่นในกรุงเทพฯ เป็นผลสืบเนื่องมาจากความเติบโตด้านการเงินและการมีวิถีชีวิตแบบเมืองของคนกรุงเทพฯ นอกจากนั้น งานวิจัยนี้ยังพบอีกว่าเมื่อไม่นานมานี้ร้านอาหารญี่ปุ่นสำหรับคนญี่ปุ่นกับร้านอาหารญี่ปุ่นสำหรับคนไทยได้เริ่มผสมกลมกลืนเข้าหากันแล้ว

กล่าวโดยสรุป ยุคใหม่ของอุตสาหกรรมร้านอาหารญี่ปุ่นในกรุงเทพฯ ได้เริ่มขึ้นแล้ว ในอนาคตอันใกล้ อาหารญี่ปุ่นสำหรับคนไทยมีแนวโน้มที่จะกลายเป็นอาหารที่รับประทานเป็นประจำทุกวัน แทนที่จะรับประทานในโอกาสพิเศษเท่านั้น

สาขาวิชา เอเชียตะวันออกเฉียงใต้ศึกษา ลายมือชื่อนิสิต ....

ปีการศึกษา 2558 ลายมือชื่อ อ.ที่ปรึกษาหลัก ....

5687662820 : MAJOR SOUTHEAST ASIAN STUDIES
KEYWORDS: JAPANESE RESTAURANT / RESTAURANT CHAIN / JAPANESE COMMUNITY IN BANGKOK / LIFE STYLE / SHOPPING MALL

MIZUE MIYAMOTO: THE EXPANSION OF JAPANESE RESTAURANT INDUSTRY IN BANGKOK. ADVISOR: PROF. AMARA PRASITHRATHSINT, Ph.D., 108 pp.

It was observed that the number of Japanese restaurants in Bangkok had been rapidly increased in the previous decade, and no study has been done to explain this remarkable phenomenon. Therefore, this study aims to examine the factors affecting the expansion of Japanese restaurant industry in Bangkok. It is hypothesized that the expansion is caused by changes in the Japanese community in Bangkok and in the Thai local society. Data for analysis was obtained from field surveys, interviews of key persons, websites, and official statistics. The results of the qualitative and quantitative analyses show that restaurants that served authentic Japanese food for Japanese only have increased due to expansion of the Japanese community while Japanese restaurants for Thais have been cultivated by four big chains: Fuji, OISHI, Hachiban, and ZEN, and flourished since the middle of the 2000s. As a result, all kinds and levels of Japanese restaurants are available in Bangkok now, especially localized “Sushi&Sashimi” is popular. It is found that the change in Thai society which caused the boom of Japanese restaurants in Bangkok is due to the financial growth and urban lifestyle of the Bangkokians. Recently, Japanese restaurants for Japanese residents and those for Thai people have started to integrate with each other. In conclusion, a new age for Japanese restaurant industry in Bangkok has emerged. In the near future, Japanese food is likely to become everyday food, not just special food for Thai people.

Field of Study:	Southeast Asian Studies	Student's Signature	....
Academic Year:	2015	Advisor's Signature	....

ACKNOWLEDGEMENTS

I wish to appreciate my advisor, Prof. Amara Prasithrathsint, for her insightful suggestions and patience to support my long journey. Thanks to her help, this project which started with my unorganized curiosity was able to be in the shape of a thesis.

I also would like to thank Dr. Saikaew Tipakorn not only for her helping me clarifying the focus direction during the proposal process, but also her large effort on coordinating my examination.

In addition a special thanks to Mr. Pira Pewnim and Ms. Krongkarn Atchayasoontorn for their great administrative support.

Finally, I thank my classmates Saket Phutphitak and Sirochi Sittisombut for their excellent support on interview research with Thai local people.

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CHAPTER 1
Introduction

1.1 Statement of the Problem

Japanese food has been booming globally since the 2000's. According to the Japanese Ministry of Agriculture's website, the Organization to Promote Japanese Restaurants Abroad (JRO) was established in 2007 under the Ministry's official recognition. It's successful to a certain extent. The number of Japanese restaurants overseas increased between the years 2006-2013.

Particularly in Asia, it nearly tripled in the same period. Moreover, Japanese food was approved as a UNESCO intangible cultural heritage in the year 2013. Southeast Asia is also involved in this business. Japanese restaurant chains, such as Yoshinoya, Mos burger, Ootoya or Saboten, opened their branches first in Singapore, and then spread to Malaysia and Thailand. High-quality Japanese restaurants are now truly available in these countries.

In Thailand the boom looks especially outstanding. Japanese food has become the second local food next to Thai food. For example, a newly-opened shopping mall called Central Embassy, which is placed in the center of Bangkok city that has six Japanese restaurants with much variety of dishes, Gateway Ekkamai, which was opened in 2012 with its concept of "Japan", where the majority of the restaurants are also Japanese restaurants targeting both Thai people and Japanese residents. High quality and great variety of Japanese food are highly available. The question that interests me is: Why and how Japanese restaurants in Bangkok have been expanding rapidly as such?

Japanese food did not start spreading to general public in Thailand until a Japanese restaurant opened for the mass around 1999 (Japan External Trade Organization, 2010). Before that Japanese food used to be for only Japanese expatriates, and most Thai people even did not accept Sashimi. Nowadays, there are up to 1,300 Japanese restaurants in Thailand. Most customers are Thai people, and it is more difficult to find Japanese people.

The reason why Japanese food spread to the mass of Thai people should not be due only to the marketing of Organization to Promote Japanese Restaurants Abroad (JRO). Their activities could probably promote only the trend. There must be economic and social transformation in the background of the trends. However, Thailand has the third largest number of Japanese long-term residents according to the statistics from Ministry of Foreign affairs of Japan. Japanese residents are concentrated in Bangkok, which has a large Japanese community seeking authentic Japanese food. In contrast, Japanese expatriates have low accessibility to Japanese food. They have to visit Japan to purchase Japanese food. In short, a large Japanese community should influence Japanese food industry in Thailand, especially in the city of Bangkok.

The purpose of this study is to analyze the phenomenon of the expansion of Japanese restaurants from sociological points of view, related to local Thai people and Japanese residents in Bangkok. I proceeded with the study based on the following hypothesis.

1) Japanese restaurant industry in Bangkok is rapidly increasing.

Japanese restaurants in Bangkok can be divided into two groups depending on their target customers:

I: Japanese restaurants targeting Thai people

II: Japanese restaurants targeting Japanese residents in Bangkok.

The restaurants have been expanding in both segments in terms of variety and numbers.

2) The factors of the expansion are related to both Thai and Japanese residents in Bangkok.

The sociological and economical changes in both Thai and in the Japanese community are influencing the expansion.

1.2 Literature Review

Studies on Japanese restaurants in Bangkok have been done mainly from business perspective. The Japanese Chamber of Commerce (JCC) has published two articles recently: *Tai no gaishokusangyo, tokuni Nihonshoku resutoran nitsuite (a study of food industry, particularly about Japanese restaurants), 2008, and Tai no nihonshoku restran no genjo to kongo (Current status and future prospect of Japanese restaurants in Thailand).*The former one is written by Tazatsu, from Japan External Trade Organization (JETRO) which mainly summarize *the information related to restaurant industry's expansion to Thailand*. The articles show an overview of overall restaurant industry in Thailand, including analysis of the consumers' circumstances. It also displays the survey results of Japanese restaurants in terms of numbers and varieties. It describes Bangkok as "the place where the best quality of Japanese food is available at the most reasonable prices" The study gives a summary of the trends as follows;

1. Severer competition
2. Differentiation
3. Including Bangkokians as major customers.

The other article written by Asai, the head of Thai branch in JRO, analyzes the current circumstances and trends of Japanese restaurants in Bangkok. The purpose of this paper is to promote investment in Japanese restaurant business in Bangkok successfully; therefore it is written for business in marketing perspectives. The purpose is to investigate how the market should expand for both Japanese expatriates and Thai middle class, although currently more Japanese restaurants are in higher price range. However, the competition is quite severe; therefore, the key for the future is to attract lower-middle class but then food must be supplied with less than one hundred baht with good quality.

The next group from previous studies aims at promoting Japanese food to other countries. JETRO has made a large number of surveys on Japanese Foods Directed at Overseas Consumers. In 2012 and 2013, Surveys were conducted in the following 13 countries : those in China, Hong Kong, Taiwan, South Korea, United States, France and Italy were conducted In 2012; those in Russia, Vietnam, Indonesia, Thailand, Brazil, and UAE were conducted in 2013. The data was collected via internet and the results show that Japanese food is the most popular foreign food in Thailand, compared to Indonesia, Vietnam and Russia. The results of the surveys show the specific images of Japanese food-the reasons why they like it and problems involved.

Masuda (2010) describes a connection between increasing tourists from Thailand to Japan, plus the popularity of Japanese food in Thailand. He analyzes the reasons why it's tremendously increasing in Thai tourists. Kakumoto (2011:3) also emphasizes Japanese food's importance in order to promote tourism to Japan, as it has a good reputation in other countries.

Miyashita (2014) analyzes Japanese food overseas from the corporate management perspective. He reviews the present global Japanese food boom with increasing Japanese restaurants as proof, and analyzes the reasons. Based on these considerations, the author studies global management stages of several Japanese food corporations, which have developed their business overseas. (Miyashita, 2014)

While most studies have been done in Japan, a few articles are seen in the United States. Katayama (2015), a writer of *Newsweek* who lives in New York reports that Japanese restaurants in the United States have been evolved to "real" Japanese. In Zagat Survey New York 2014, Japanese food is ranked the first surpassing French. Japanese food is not limited to Sushi anymore, and varieties of Japanese restaurants such as *Robatayaki, Okonomiyaki* , *soba* or *udon* are available in big cities(Katayama, 2015).Bestor (2015) studies Sushi and its ingredients under a framework of global supply chain. He revealed globally dependent Sushi ingredients, especially tuna. Japan is the center of tuna market but it is highly dependent on supply from far away regions, such as the United States or Spain. It is structured complexly so that Japanese restaurants in the United States have to pay high price to imported tuna, even though it was fished in the coast of New England(Bestor, 2015).

Lastly I would like to mention a thesis entitled "Japanese corporate culture and its dynamics" in Thailand: "*A case study of Thaniya area*", written by Yoko Kusaka(1999). In this thesis the author's objective is to show reflection of Japanese corporate culture in the unique night area; however it also reflects the situation of Japanese restaurants in Bangkok in the 1990s, which is different from the present situation. This could be an evidence of changing situation until now.

Past studies focus on business and a few studies dealing with the phenomenon and social backgrounds of it. Even JETRO, it has provided only primary survey results. If we want deeper knowledge, we will have to do further analysis. Below are three JETRO surveys, which are used as preliminary data of this thesis.

Nihon Shokuhin ni Taisuru Gaigai shohisha Anketo Chosa [The Survey of overseas consumers concerning Japanese food] *(JETRO survey 2013)*

This survey was conducted by Japan External Trade Organization (JETRO) in 2013, covering 2,800 consumers in their 10s through 50s living in the seven countries and regions of Bangkok, Moscow, Ho Chi Minh City, Jakarta, San Paulo, Dubai. In the present survey provided is based on Bangkok. By collecting answers from 500 people in Bangkok, from asking questions about favorite foreign food, reasons of being fond of Japanese food and pictures displaying Japanese food. This survey provides us an overview of Thai people's attitude/experience to Japanese food.

Heisei 18 Nendo Shokuhin Sangyo Kokusaika Kanosei Chosa. Gaishoku Sangyo no Taikoku Shinshutsu Kanren *Joho* [Information related to Restaurant industry's expansion to Thailand] ***(JETRO report 2007)***

This report includes all the necessary information for Japanese restaurant companies entering the Thai market, such as laws and procedures related to opening restaurants and regulations for importing food to Thailand. In this thesis, I use chapter 5 "summary of restaurant industry" and its attachments as a data source. The attachments include the lists of registered Japanese restaurants.

Taikoku Bankoku ni okeru Nihonshoku Resutoran Jittai Chosa - Nihonshoku restoran heno intabyu kara [The survey of Japanese restaurants in Thailand (Bangkok): Based on interviews with Japanese restaurants] (JETRO Survey 2015)

This survey contains the latest information related to Japanese restaurants, such as the numbers of Japanese restaurants in Bangkok and different kinds of food they provided.

1.3 Definition of "Japanese restaurant"

Following the definition provided by Japan External Trade Organization (JETRO) Bangkok center, I define "Japanese restaurants" as independent restaurants which provide food to eat in, including not only authentic Japanese but also foreign origin food which are adjusted to Japanese style such as Ramen, Japanese curry, Japanese BBQ, Japanese style western food, Takoyaki [1], Okonomiyaki [2]. An international restaurant which serves food based on Japanese food such as sushi, is also included. "Japanese restaurants" as defined here do not include food courts in department stores, street venders, Karaoke places, hotel restaurants which provides Japanese food in buffet but do not have specific Japanese food in their menu. They also exclude non-Japanese food restaurants which have Japanese owners, managers,

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[1] Wheat balls with vegetable and octopus in them
[2] Japanese pancakes with vegetable and seafood or meat

such as Korean BBQ, western restaurants, Chinese restaurants, cafes, bars, dessert shops are also excluded as they are not categorized as “restaurants”.

1.4 Data collection: Interview with and Japanese informants

Two kinds of interviews are conducted in this research. The first is interviewing Thai people, and the second is interviewing Japanese people. The result of the interviews was used as main data for the analysis in this research.

Interview with Thai people

I selected 30 Thai people on purpose by using judgement sampling method. I found one interviewee was Cambodian and another Burmese. These two people were not included in the analysis. The interviewees were 10-50 years old and had different occupations. The interview of Thai informants was based on the prepared questions shown below.

Table 1 List of questions

0. Please inform your approx. age, occupation, living location in Bangkok and hometown
1. What is your favorite foreign food? (E.g. Chinese, Japanese, Italian…)
2. Do you like Japanese food? Why?
3. What is your image of Japanese food?
4. What is your favorite Japanese dish? (E.g. Sushi, Tonkatsu[3] …)
5. How often do you eat Japanese food? When?
6. In which restaurant do you eat Japanese food most frequently? Why? Is it in a shopping mall?

[3] Deep fried pork with crispy powders

7. since when you come to like Japanese food? Why? 8. Do you eat Japanese food in markets? 9. What is your favorite shopping mall? How often do you go to shopping malls? 10. Do you have influence of TV programs about your selecting food? 11. Other comments if any

The Thai respondents or interviewees are grouped by age and occupation as shown in Tables 2 and 3 below.

Table 2 Thai interviewees classified by age

Age	Number of respondants
Under 20	2
20-29	10
30-39	8
40-49	6
50-59	4

Table 3 Thai Interviewees classified by occupation

Occupation	Number of interviewees
Office manager or upper, professor	8
Office worker, coffee shop owner	9
Guard, maid	6
Student	7

The collected data is mainly used in Chapter 3. However, part of their comments are used in overall research.

I use abbreviations when mentioning people I interviewed. Interviewees whose abbreviation starts with J are Japanese residents, and those whose abbreviation starts with T are Thai people. The following characters show the interviewees with alphabets.

Interviews of Japanese informants

The following are the Japanese persons that I interviewed.

1) Japanese free magazine editors and Japanese phone directory editors (Three respondents). They gave information about Japanese restaurant industry that belongs to Japanese community from different perspectives. They are as follows:

   J.A : an editor of a Japanese free magazine, *Thai JIYU LAND*, interviewed on March 5th, 2015.

   J.C : the Chief Editor of a Japanese phone directory, *Hello Thailand,* interviewed on Jun 5th, 2015.

J.D : an editor of a Japanese free magazine, *Wise,* interviewed on June 21st, 2015.

2) Japanese restaurant owners, chefs and managers provided useful information such as old history of Japanese restaurant industry, change of customers, the reasons they chose Bangkok for their business and so on from restaurant owners' points of view. The information is used in overall research. The following is the list of the Japanese interviewees in this category.

J.E : the chef of a high-end sushi restaurant in Sukhumvit area.

J.G : the owner of a Yakitori restaurant in Silom area, since 1980s, interviewed on Jul 14th, 2015.

J.H : the owner of the oldest Japanese restaurant in Bangkok, *Hanaya*, interviewed on Aug 1st, 2015.

J.I : the owner of a Japanese high-end restaurant in Rajadamri since early 1990s, interviewed on Aug 1st, 2015.

J.J : the owner of a Japanese high-end restaurant in Thonglor area since 2000s, interviewed on 4th, 2015.

J.K : the manager of a new Japanese restaurant in Sukhumvit area, interviewed on Aug 8th, 2015.

3) Job agents for Japanese companies in Bangkok (two respondents).

J.B : the president of a job agency for Japanese companies, who established one of the oldest job agencies for Japanese companies in early 1990s. He has much knowledge about Japanese residents in Bangkok, especially in terms of occupation, hierarchy, social status, financial status and so on. He provided beneficial information which was used mainly for Chapter 3. He was interviewed on March 10th,2015.

J.L : working for a large Japanese agency, interviewed on October 12th,2015.

4) Japanese long-term residents

J.F : a Japanese long-term resident, who had lived in Bangkok for 25 years. He provided general knowledge of Japanese society including accessibility to Japanese food since 1990s.

1.5 Structure of the thesis

This thesis is organized into four chapters as follows.

Chapter 1 includes objective of this research, literature review, and methodology of interviews, which provide key data for the analysis.

Chapter 2 explores the present situation of Japanese restaurant industry in Bangkok. It is an overview of the industry based on given statistics provided by other sources. The second deals with Japanese restaurant chains, which triggered the spreading of Japanese food among Thai people. The third concerns the locations of Japanese restaurants at shopping malls, and other areas, The data was collected by field research and online research; the details and methods are described in the section. The fourth part is the investigation of the restaurants for Japanese residents and for Thai people in terms of restaurant categories and location. This includes comparison of the Japanese residents and Thai people regarding how much integration has occurred. The data was collected from Japanese free magazines and reviews of Japanese restaurants in Bangkok published in the internet. The detailed research method is described in this section.

Chapter 3 investigates Japanese community in Bangkok, which has influence on Japanese restaurant industry. First, I discuss how the community has expanded and diversified in terms of social class, family structure and location. Secondly I examine how Japanese restaurant industry in Bangkok has grown before it started to boom among Thai people in the middle of the 2000s, and how it was influenced by the change of Japanese community. Thirdly, I discuss the contribution of Japanese community and the development of Japanese restaurant industry in Bangkok.

Chapter 4 discusses how Thai society in Bangkok has changed in different dimensions and its influence on Japanese restaurant industry in Bangkok. First, I examine financial growth in Bangkok, how it caused changes in socio-economic structure and people's expenditure on food industry. Next, I investigate connections between people in Bangkok's new life style, the spread of Japanese restaurants from different perspectives, such as demands for food, urbanization of occupations, how to spend holidays and so on. The analysis is based on my interview of Thai people living in Bangkok.

Chapter 5 is the conclusion of the thesis.

CHAPTER 2

the Present Situation of Japanese Restaurants in Bangkok

2.1 Overview: Expanding Japanese restaurant industry in numbers and varieties

2.1.1. The increase of the number of Japanese restaurants from 2007 to 2014

According to JETRO survey in 2015, it is estimated that there are 2126 Japanese restaurants in all Thailand, and 1389 out of 2126 are located in Bangkok as of 2014. Figure 1 shows the numbers of Japanese restaurants in Bangkok and the others are different areas in Thailand during 2007, 2010 and 2014 based on JETRO surveys.

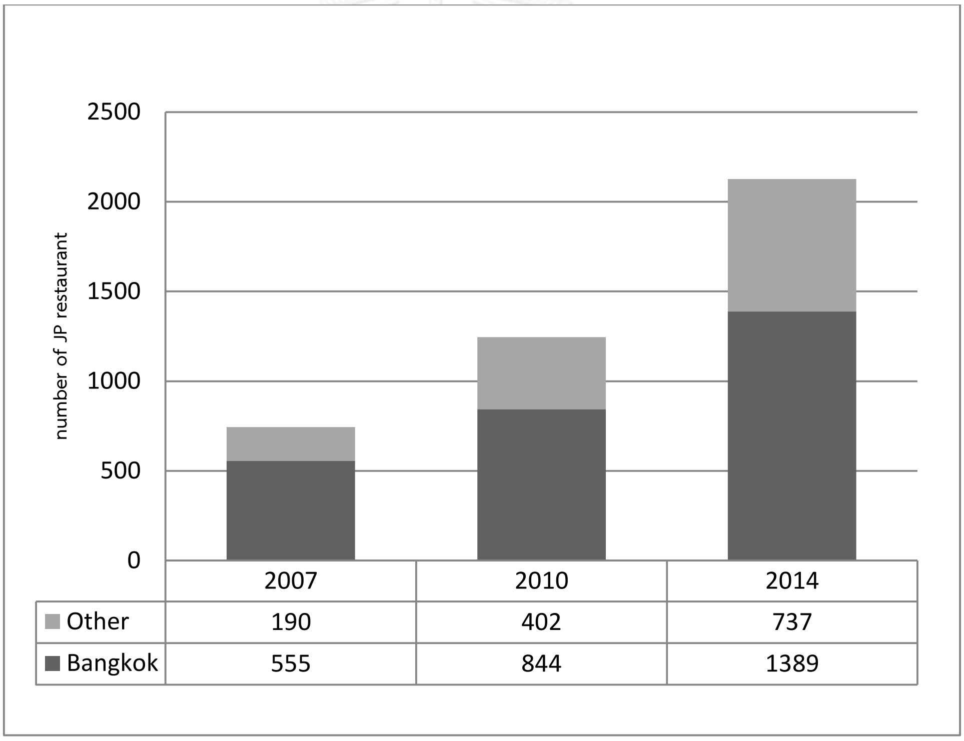

Figure 1 Number of Japanese restaurants in Bangkok and all Thailand 2007-2014.

Source: Asai.(2010:27) for 2007 and 2010, JETRO Bangkok.(2015:8) for 2014

The number of Japanese restaurants in all Thailand increased from 555 to 844, by 52% from 2007 to 2010. That increased from 844 in 2010 to 1389 in 2014, by 65%. The number of Japanese restaurants in Thailand has been increasing nearly 20% every year. Nearly two third of the restaurants are concentrated in Bangkok, although

the percentage of the restaurants in Bangkok has been decreasing from 74% to 65% in the last 7 years. This fact reflects that the number of Japanese restaurants has been gradually spreading to other provinces. However, still nearly two third of all the Japanese restaurants are
located in Bangkok.

2.1.2 Rich varieties of Japanese restaurants in Bangkok

It is not only volume that is significant but also rich variety of Japanese food in Bangkok. JETRO Bangkok provides data of the restaurants by categories based on two kinds of resources: the first is their own research cooperated with JRO, and the other is Wongnai.com, which is a Thai restaurant review website. Figure 2 below shows the result of the JETRO and JRO research.

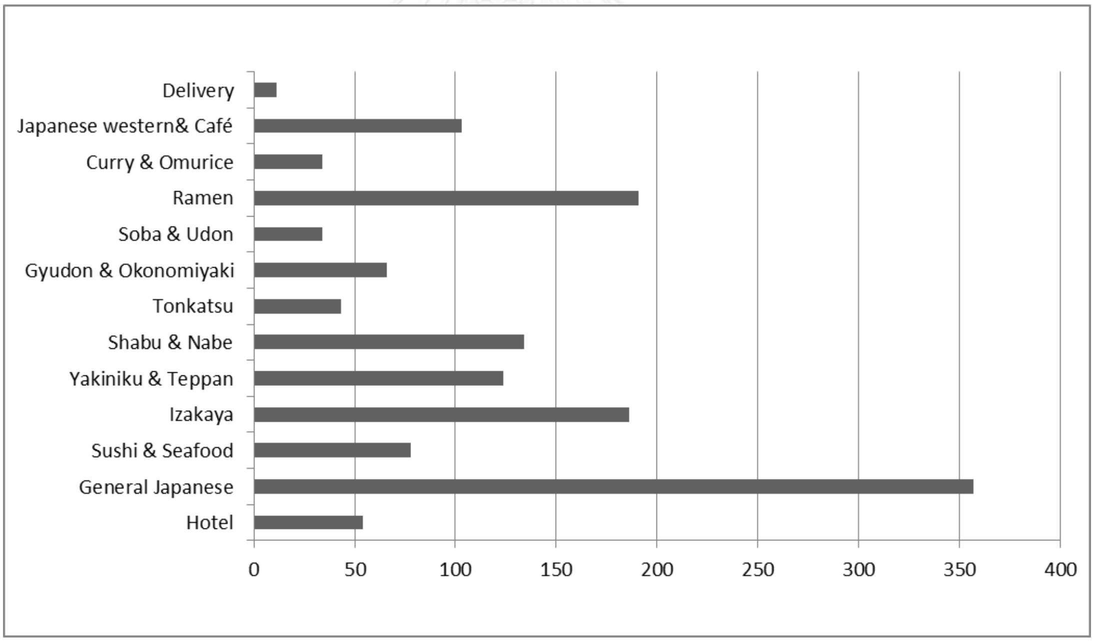

Figure 2 Japanese restaurants in Bangkok by Category 2014

Source : JETRO Bangkok.(2015:8)

Although general Japanese restaurants are the biggest category, it is only 25% of the total number. The others are specialized restaurants, such as Sushi& Seafood, Izakaya[4] or Yakiniku&Teppan[5], which provide specific kinds of food. This indicate Japanese restaurant industry in Bangkok is as matured as in New York City. Katayama reported in *Newsweek*, “In New York City, Sushi is now a regular choice and some New Yorkers eat sushi every week. Recently the boom has been expanded to second cheap everyday food such as Ramen, Izakaya, Robatayak[6]i, soba[7] and Udo[8]n although there are still many non-authentic Japanese restaurants in country sides”.(Katayama, 2015). The same phenomenon has been happening in Bangkok. More than 100 shops of Japanese-Western food restaurants are available. This fact shows the high influence of Japanese food culture in Bangkok. Tazatsu(2007) describes Bangkok as “There is Japanese food available which Japanese people feel tasty with the most reasonable price outside Japan”. He raises his concerns: “based on the restaurant rising in numbers in the city of Bangkok. Due to many Japanese restaurants in the area there are many choices of food available. Therefore, restaurants are not gaining customers hence this breeds a fierce competition in the city” (Tazatsu 2008). Asai makes his discussion that new Japanese restaurants are heading toward the direction of “segmentation /specialization” as a result of the severe competition. Originally, Japanese restaurants target customers who were “Business people”at company dinner or company events and parties based on a high end budget. Recently an expansion has been occurring with “restaurants with standard price range” This reflects how popular Japanese community has become in Bangkok. Obtaining middle class Thai people as stable customers is the other reason for this change. (Asai, 2010)

[4] A kind of Japanese restaurant offering various alcohol drinks and food matching them
[5] Japanese BBQ
[6] Charcoal grilled food such as seafood, vegetables
[7] Japanese noodle made of buckwheat
[8] Japanese noodle made of wheat

2.1.3 Popularity of Japanese food among Thai people

The result of JETRO Survey 2012 displays the popularity of Japanese food among Thai people. Japanese food is chosen by 66.6 % of the respondents as their favorite foreign food, followed by Chinese food (18.4%), the next is Korean food (6.8%). It shows Japanese food is overwhelmingly popular among Thai people. The reasons why they like Japanese food are: “Tasty” (37.1%),” Healthy” (26%), “Luxurious, sophisticated” (12.6%), and “I like the country (Japan)” (5.7%). In short, they like Japanese food mainly because of the food itself, not because they like Japan as a country. Regarding favorite kinds of food, “Sushi and Sashimi” are ranked the first with 32%, followed by Shabushabu[9] (13.6%), Sukiyaki [10](10.4%), Tempura (8.4%), and Ramen (8.0%) and so on. Sushi and Sashimi are overwhelmingly popular. However, large varieties of Japanese dishes are also supported (JETRO, 2014). The figure shows that Japanese food for Thai people does not mean only Sushi and Sashimi, but includes a lot more variety.

[9] Japanese pot
[10] Different style of Japanese pot

Table 4 Favorite Japanese food

	First	Second	Third	Total
Sushi, Sashimi	32.0	12.0	7.8	51.8
Shabu	13.6	17.0	10.8	41.4
Sukiyaki	10.4	11.8	11.0	33.2
Ramen	8.0	10.0	13.6	31.6
Tempura	8.4	11.8	9.8	30
Takoyaki	7.6	8.6	9.6	25.8
Udon	2.6	5.0	7.6	15.2
Tonkatsu	2.8	5.4	5.4	13.6
Soba	3.8	3.4	5.0	12.2
Yakitori[11]	2.4	3.4	5.6	11.4
Okonomiyaki	2.4	3.8	4.2	10.4
Curry&rice	1.8	2.6	4.0	8.4
Oden[12]	3.0	2.8	2.4	8.2
Gyudon[13]	1.2	2.4	3.2	6.8

(Source: Japan External Trade Organization. (2014a:30)

[11] Chacoal grilled chicken
[12] Different style of Japanese pot from Shabu or Sukiyaki
[13] Rice bowls with cooked beef

2.2 Japanese restaurant Chains

2.2.1 Big four chains

Tazatsu(2008) describes that "A feature of Japanese restaurants in Thailand is that there are quite a few numbers of Japanese restaurant chains for Thais. Probably Japanese food has the largest number of chains among foreign restaurant chains in Thailand except fast food". Respondent J.H, the owner of Hanaya restaurant, the oldest Japanese restaurant in Bangkok, asserts that Fuji Japanese restaurant group was the first to spread Japanese food to Thai people in 1980s. The second boom was triggered by Oishi group in 1990s.The situation about Japanese restaurant chains is inevitably due to its importance.

According to JETRO, major chains as of 2007 are : "Fuji", 45 shops in all Thailand, "Zen", 25 shops, Oishi group which runs "Oishi buffet", "Oishi Ramen", "Shabushi",Sushi bar and so on, total of 84 shops and "Hachiban Ramen" with 81 shops. The total number of their shops is 265. This quantity is nearly one third of the all Japanese restaurants in Thailand. (JETRO, 2007). In addition, it can be estimated that there were 200 – 300 Japanese restaurants inside the Japanese community. It's expected that one third were big 4 chains, another one third were Japanese restaurants for Japanese residents; the other one third would be small-sized Japanese restaurants for Thai people. Some details about the 4 chains are given below.

Fuji

Fuji could be the restaurant chain which has been contributing to the food industry in Bangkok. "Fuji is a General Japanese restaurant which has a long history and biggest networks in all over the country. It's supported by Thai people (JETRO, 2007). It had 45 shops in 2007, and according to its corporate website, it has increased to 95 shops including 4 oversea branches; 55 of them are located in Bangkok. Most of them are located in major shopping malls, such as Central, Tesco and the Mall, and there is no roadside store according to its official website. All of them are located in shopping malls or office buildings. They have closed only 12 shops so far, and it is significant that they have been expanding their business quite successfully. Mr. Watanuki says that Fuji grew together with Central group." It started as a spin out from a Sushi restaurant in Taniya which targeted Japanese people. However, they found they can attract Thai people. So arrangements was made for Japanese food in order to fit Thai taste, such as replacing Oshinko (Japanese pickles) by Korean Kimichi. After it opened, the branch at Central Ladprao in 1983 started to boom as Central group grew with the advantage of marketing power. After its boom, many customers started making comments of the food comparing with Fuji." Recently Fuji restaurants are included in most of the major shopping malls in Thailand. JETRO analyzes the reasons of success. "It purchases most materials from domestic market, arranges the taste to fit Thai people and offer reasonable prices."

On a weekday around 13:30 in June 2015 the author visited Fuji Ladprao branch for field research. Although it was already late for lunch time, Fuji restaurants are nearly full with customers from different age groups such as Students, family and seniors. (Figure 3). In contrast, a Vietnamese restaurant next door was nearly empty.

Figure 3 Fuji restaurant in Central Ladprao

15/06/2015 photo taken by author, Bangkok

The menu was broad in selections, which includes not only authentic menus such as Sushi, Tempura and Soba and recently developed daily Japanese food such as Takoyaki, Ramen, Tonkatsu and Hamburg steak. However, the most unique dishes served are the wide selections of salads, which are now very popular among both Thais and Japanese people. However, grilled fish and colorful sushi rolls (Figure 5) are not authentic dishes in Japanese restaurants in Japan.

Figure 4 Salad menus, Fuji restaurant in June 2015

15/06/2015 photo taken by author, Bangkok

Figure 5 Sushi roll menu (part 1), Fuji restaurant in June 2015

15/06/2015 photo taken by author, Bangkok

According to a waitress there, the shop's recommendation was "tuna salad", two kinds of "salmon roll", "sushi set" and "grilled salmon". Dishes such as salmon or fish is a key term in marketing Japanese food in Thailand.

I also observed other Fuji restaurants and found Fuji is in many cases the restaurant which attracts the largest number of customers. For example, on a weekday of July 2015 in Tesco lotus Rama IV, the seats were 70% occupied at Fuji even at 14:00, although the other restaurants were occupied it's less than 30%. This suggests that Fuji is widely accepted and liked by Thai people.

Oishi Group

Oishi group is the biggest corporate entity in terms of the number of restaurants. It is growing fast, increasing to 220 restaurants in Thailand excluding snack shops. It was nearly tripled in 2007 with 81 shops. The total number of Japanese restaurants was 745 in 2007, therefore Oishi group has been growing at the same pace with the total market, and continuously keeping more than 10% share. JETRO comments, "Oishi restaurant" triggered Japanese food boom in Bangkok in 1999 by opening "Oishi buffet", a buffet style Japanese restaurant. The price at that time was 499 THB per person, which was rather high. However, the style broke the image of “Japanese food as expensive but little”(JETRO, 2007). As of 2015 it runs eight brands of restaurants. “Shabushi” is the major one with 107 shops in Thailand, which serve Shabu ingredients moving along a conveyer belt, so that customers can choose on sight what ingredients they want to put in their pots, in addition to assorted Sushi in buffet style. Oishi group earns half of the revenue from drink business and contributes to spreading Japanese green tea.

Figure 6 Shabushi Ekkamai Gateway (1)

07/06/2015 photo taken by author, Bangkok

Figure 7 Shabushi Ekkamai Gateway (2)

07/06/2015 photo taken by author, Bangkok

Figure 6 and Figure 7 show Shabushi Gateway Ekkamai. Gateway Ekkamai is a shopping mall with “Japan” as its theme, and it has several authentic Japanese restaurants. Although this photo was taken at 15:00 during daytime, it can be seen that the seats are almost fully occupied, while the other Japanese “authentic” restaurants were not as busy as this. Does this mean their marketing is successful and accepted by Thai people? If so, this will explain why the majority of Thais more chooses Shabushi than authentic Japanese restaurants. This is going to be discussed by using Thai people’s opinions expressed in interviews. However, an obvious thing is Shabushi restaurants are frequently full and have long lines, so they implemented an automatic system in order to manage waiting customers.

Figure 8 Kakashi in Tesco Lotus Rama IV (1)

08/07/2015 photo taken by author, Bangkok

Figure 9 Kakashi in Tesco Lotus Rama IV (2)

08/07/2015 photo taken by author, Bangkok

Figure 8 and Figure 9 are photos of "Kakashi" in Tesco Lotus RamaIV. Kakashi, the newest type of restaurants by Oishi group described as "A quick service restaurant serving Japanese rice with various toppings at an economic price." Fast food style Japanese restaurants with ordering counter is not as exciting in Japan, and neither the combination of rice bowls, Gyoza[14] or Takoyaki. Oishi group is pursuing creative, localized style Japanese food for Thai people. In fact, this company is all operated by Thai managers in contrast with Fuji, which is owned and managed by Japanese.

Hachiban Ramen

Hachiban is an essential chain when describing Japanese food industry in Thailand. It's originated from Hokuriku region, Japan. According to its official corporate website, Hachiban Ramen has 125 branches in Japan. However, it focuses on the specific region while it has 110 branches in all over Thailand. JETRO says, "Its

[14] Fried dumplings

feature is that it is proactively expanding to other regions. It is successful because it targets Thai people and is widely accepted by them." More than half the branches are located in other regions, and recently opened branches are concentrated on outside Bangkok. It has increased plus 26 branches in the last 7 years. Hachiban can be seen in almost all major shopping malls as well as Fuji and Oishi. Hachiban is widely accepted due to its low price (less than 100 THB). Khun L, a graduate student in Bangkok, says he likes Japanese food very much and he goes to Fuji or Oishi, when he has extra budget and to Hachiban when he does not.

Figure 10 Hachiban Ramen Central Ladprao

15/06/2015 photo taken by author, Bangkok

Zen

Zen is a restaurant chain operated by Thais. However it differentiates itself from Fuji by high-end positioning with import ingredients and Kimono-dressed staff and so on(JETRO, 2007). Zen has 40 branches as of September 2015[15] which increased by 60% from 25 branches in 2007. The majority (33 shops) are located in Bangkok. It focused on Bangkok metropolis but started expanding to upcountry the same time as Central shopping malls' expansion.

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[15] (corporate website, http://www.zenrestaurant.co.th/web/branches.php),

As described earlier, the four chains dominated the market around the middle of the 2000s.

There were some other chains known as Sakura or Kobune, but they only had a few branches at that time.

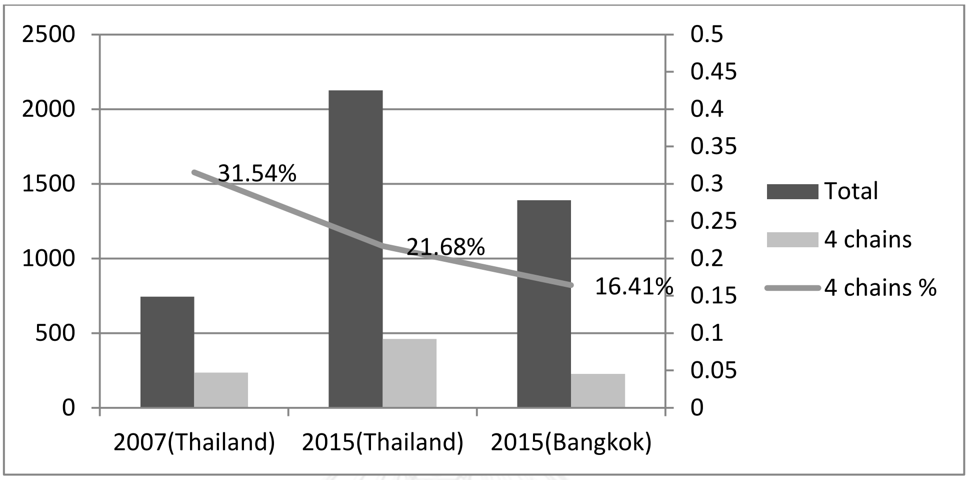

Figure 11 Number of 4 chain restaurants and their percentages out of the total number of Japanese restaurants

Source: created by author, based on Japan External Trade Organization. (2007:attachment 8 1-24) for 2007, JETRO Bangkok. (2015:8), OISHI Group. (2014) and company websites[16] for 2015

In 2007, the number of shop in the four chains occupied 32% of all the Japanese restaurants in Thailand. However it decreased to 22% in the year 2015. Although these four chains have been expanding, the rest of the market has been expanding faster. The Total number of Japanese restaurants increased from 745 to 2,126, almost tripled. This drastic growth of Japanese restaurant industry was brought by newly emerging chains as shown in the next.

[16] http://www.fuji.co.th/2009/TH/branches/index.php
http://www.zenrestaurant.co.th/
http://www.hachiban.co.jp/business/abroad/thailand/

2.2.2 Emerging chains

The market share of the four chains started to decrease after the middle of the 2000s due to emerging new chains. Ootoya played an important role for the new era of Japanese food industry in Bangkok. It was the first case that attracted Thai people with its authentic taste (the same taste as what is served in Japan). After Ootoya business started to spread as their chain restaurants were opened in Bangkok City. The chain restaurants were called Yayoi, Yamagoya, Coco Ichibanya, Tokai. Both Japanese brands and Thai brands emerged and expanded.

J.F, a Japanese business person who has lived in Bangkok since the late 1980s, remembers that "the stream changed in 2005 after Ootoya's success."

Ootoya is a Japanese restaurant chain which serves Japanese home cooking dishes. Although it originally expanded in Japan with their concept of serving home-cooking style dishes with affordable price, but it is regarded as high-end Japanese food in Thailand.

It opened its first branch in Thonglor area, where it was famous for Japanese restaurants for Japanese people at that time. Mr. M, who has been publishing a phone directory for Japanese people in Thailand since early 1990s, says "It became so famous among Japanese residents that long queues were made, apparently the reputation spread to Thai people." JETRO reports that "branches are rapidly increasing due to popularity among high class people, although it is a new way to serve set menus, without 'Sushi' and 'Sashimi' (JETRO, 2007). Ootoya is the first chain to bring authentic" (meaning the same taste as provided in Japan) Japanese food from Japan to Thailand and helps spread "authentic" Japanese food among Thais.

The menus and the taste are harmonized with those in Japan to some extent. For example, a long-seller menu "Tori to Yasai no Kurozu-an set" is nearly the same in Japan (figure 12) and Thailand (figure 13). Each piece is 788 Japanese yen (=239THB, 1THB=3.3JPY) and 289 Thai baht, 20% higher in Thailand. It's considered standard prices in both countries. The price in Thailand can be considered to be luxurious, and this shows a high position of Japanese food in Thailand.

https://www.ootoya.com/menu.asp?tcid=1

Figure 12 Ootoya memu (JP)

Figure 13 Ootoya menu (TH)

http://www.ootoya.co.th/menu-ootoya-gohandokoro/teishoku/

Ootoya had eight branches in 2007, which estimated to be expanding to 55 branches estimated by Wongnai.com, including Ootoya Kitchen. It has a high budget range.

After Ootoya's arrival, there were two significant changes in Japanese food industry in Thailand. The first is that an expansion to Thailand by Japanese restaurant companies, regardless of company size, were accelerated. The second is that Thai-owned chains have increased.

New chains: Japanese brands

"Yayoi" arrived in Thailand in 2007 and have grown rapidly; there are now 116 branches in Thailand in 2015, which makes it the largest Japanese brand chain. It provides reasonable sets to Thai people. The menu is also arranged to fit Thai people taste, such as providing Thai peoples favorite "salmon roll" which were the reasons of success. Now Yayoi and Ootoya are the largest restaurant chains in Thailand.

Apart from general Japanese restaurants such as Ootoya and Yayoi, a significant number of Japanese restaurant brands which serves specialized Japanese dish also emerged by franchising. Here are some examples;

Ramen chain: "Yamagoya", "Chabuton","Korakuen", "Ippudo"

Curry: Coco Ichibanya

Gyodon, Tendon: "Yoshinoya", "Sukiya", "Tenya"

Udon: "Marugameseimen", "Miyatakesanukiudon"

Shabu: Momo paradise

Sushi: Genki Sushi, Heiroku Sushi

Tonkatsu: Saboten, Katsu King, Maisen

In additon, there are Japanese brand restaurants in broader meaning which serve "Japanese" foreign food, such as "Mos burger" (Japanese hamburger), "Pepper lunch" (Japanese steak) or "Mokuola" (Japanese-Hawaiian).

New chains: Thai brands (Including cases of Japanese owner that settled down in Thailand)

New chain restaurants originated in Thailand, have been booming regardless of Thai or Japanese owners. The following are some examples of them.

General: Kin Japanese Buffet, Daisho Sushi

Yakiniku: Tokai, AKA, King Kong Yakiniku Buffet, Miyabi

Sushi: Honmono sushi, Sushi Den, Sushi Hana, Sushi Hiro, Tenyuu

Gyudon: Chou Nan

Omurice: OMU

Japanese-western: On the table

While some chains such as Kin group or Dansho Sushi (Figure 14, Menu) serves localized Japanese food with reasonable prices, others such as Honmono Sushi or Sushi Hana pursue “real” taste of Japanese along with high prices (according to Wongnai.com, the budget per person is 500-1000 baht). “On the table” subtitled as “Tokyo café” provides Japanese style western food such as pasta.

Figure 14 Menu: "Daisho sushi"

4/7/2015 photo taken by author, Bangkok

Daisho sushi: The menu is design to fit Thai people. Some menus show pictures similar to those of Thai dishes.

Figure 15 On the table Mercury Ville
22/05/2015 photo taken by author, Bangkok

Tokyo café: Although it serves western food such as pasta or salad, it still considered to be Japanese- style food.

We can say that the Japanese restaurant industry was led by the four chains: Fuji, Oishi, Hachiban and Zen during the middle of the 2000s. New brands have been launched one after another from both Japan and inside Thailand. The significance is not only in number but also in variety. Although the majority of them were general, comprehensive Japanese restaurants in the past, a remarkable diversification has occurred recently; from authentic to localized, from comprehensive to specialized, from luxurious to reasonable or from traditional dish to Japanese foreign food.

In order to discuss restaurant chains in Bangkok, referring to shopping malls is inevitable. In the next section Japanese restaurants are discussed from a perspective of shopping malls.

2.3 The presence of Japanese restaurants at shopping malls in Bangkok

In this section I explore the presence of Japanese restaurants in shopping malls at Bangkok.

Shopping malls are attractive places for Bangkokians to spend free time, to shop in a mall with family or friends, to have a meal, or to enjoy a typical weekend activity. In other words, shopping malls are deeply connected to 'Bangkokians diet'. This is the first reason why I chose shopping malls to analyze the present condition of Japanese restaurants. This phenomenon is discussed from a sociological point of view in the next chapter. According to an interview conducted with respondents, they are well aware that the major place to eat Japanese food is in shopping malls, where customers are mainly middle class people in Bangkok. The second reason of choosing shopping malls is that it is feasible to do a quantitative analysis based on shopping malls that have a large number of restaurants.

The analysis in this section is based on data collected by the following methods. First, I selected 14 malls from those located inside the city center and residential areas, from wealthy to middle class and low budget levels during May 15, 2015 to July 20, 2015. (See Table 5). I categorized the malls into three budget ranges based on below criteria.

Standard: these malls are dominated by supermarkets. People go there for day-to day shopping.

Luxury: some of these complexes are composed of shopping malls and department stores, others consist of only shopping malls. The common point is these malls have various kinds of stores not only day-to-day use stores so that people can enjoy spending their free time or holidays.

Ultrarich : Central Embassy and Emporium/Emquatier are categorized into this group. They are full of brand name shops or flagship of foreign luxurious restaurants.

Table 5 Selected shopping malls

Number	Name of mall	Budget level	Location
1	Central World	luxury	city center
2	Central Ladprao	luxury	residential
3	Central Rama9	luxury	residential
4	Central Bangna	luxury	residential
5	MBK	standard	city center
6	Central Embassy	ultrarich	city center
7	Emporium/Emquatier	ultrarich	city center
8	Mercury Ville	luxury	city center
9	Market village Suvarnabhumi	standard	residential
10	Tesco Lotus Ladprao	standard	residential
11	Tesco Lotus Rama IV	standard	residential
12	Bic C Ladprao	standard	residential
13	Bic C Extra Rama IV	standard	residential

14	Siam Center	luxury	city center

Next, I created a database of all the restaurants in each malls and categorized into Thai, Japanese, Asians and Western. Those shops that do not provide meals such as coffee shops without meals, ice-cream shops or other shops which specialized at drinks or desserts are not included. Coffee shops which serve meals are included. Actually, Japanese recognize as "Japanese food" not only different types of food which are traditionally Japanese, such as Sushi or Gyudon, but also foreign originated food which are served in Japanese style, such as Yakiniku, Japanese curry, Japanese-western. Restaurants in food courts[17] are excluded.

Table 6 shows Japanese restaurants are the most popular restaurants in all the malls. The exceptions are only Emporium, Emquatier which have more western restaurants than Japanese restaurants and Big C Ladprao which does not have a Japanese restaurant.

[17]Food court is a common type of collective restaurant in Thailand. Several restaurants in a food court shares tables and cashiers. Budget is lower than individual restaurants in the same mall.

Table 6 categories of restaurants in shopping malls

No	Name of mall	Budget level	Location	Thai%	**Japanese %**	Other Asian %	Western %
1	Central World	luxury	city center	32%	**37%**	11%	19%
2	Central Ladprao	luxury	residential	29%	**45%**	14%	12%
3	Central Rama9	luxury	residential	28%	**54%**	9%	9%
4	Central Bangna	luxury	residential	13%	**55%**	16%	16%
5	MBK	standard	city center	13%	**51%**	13%	22%
6	Central Embassy	ultrarich	city center	16%	**32%**	11%	42%
7	Emporium/Emquatier	ultrarich	city center	12%	**28%**	14%	46%
8	Mercury Ville	luxury	city center	28%	**28%**	17%	28%
9	Market village Suvarnabhumi	standard	residential	40%	**40%**	13%	7%
10	Tesco Lotus Ladprao	standard	residential	29%	**29%**	14%	29%
11	Tesco Lotus Rama IV	standard	residential	11%	**33%**	11%	44%
12	Bic C Ladprao	standard	residential	50%	**0%**	17%	33%
13	Bic C Extra Rama IV	standard	residential	17%	**33%**	25%	25%
14	Siam Center	luxury	city center	24%	**29%**	24%	24%

There are more Japanese restaurants than Thai restaurants in the malls regardless of location and budget, although it should be considered that most of the venders in food courts are providing Thai food, but they are not included in the analysis. In five malls out of 14, more than 40%-50% are Japanese restaurants, and there are few restaurants that serve only Western food. Thus, it is safe to say that nearly half of the customers visit these malls just to eat Japanese food.

Central Rama9, Central Bangna, Central Ladprao and Market village Suvarnabhumi

Central Rama9, Central Bangna, Central Ladprao and Market village Suvarnabhumi are large shopping complexes located in residential area. The budget level of Central complexes is rather high, compared to the Market village which is a standard level. It's expected for rich Thai people or middle class people to go there and spend regular holidays or weekends with family or friends. It has a significantly high ratio of Japanese restaurants: 40 to 53%. The fact proves that Japanese food is very recognizable to Thai people. They naturally choose Japanese cuisine for their weekend lunch or dinner rather than Western food. The following is a report of Central Ladprao based on my field research on July 6th, 2015, around noon and online information provided by Central Plaza corporate website[18] .

The following table shows the names of Japanese restaurants in Central Ladprao.

Table 7 List of Japanese restaurants in Central Ladprao

Name	Kind
AKA	Yakiniku
Bakudanya	Ramen
Chabuton	Ramen
Chou Nan	General
Chou Nan2	General
Coco Ichibanya	Curry
Fuji	general
Gye Ichi Buffet	Yakiniku
Hachiban	Ramen
Harajuku	Japanese-western
Miyabi	Yakiniku
Omuto Tomato	Omurice
On the Table Tokyo Café	Japanese-western
Ootoya	general
Pepper lunch	Japanese-western
Sakura	general
Shabushi	shabu
sushiden	sushi

[18] (http://shopping.centralplaza.co.th/directory/cp/hungry_guide.php?lang=&loc=lp).

Tenya	Gyudon
Yoshinoya	Gyudon
Zen Sushi & Sake	sushi

As can be seen from the above table, there is much variety of Japanese food in this mall. They are both Thai brands and Japanese brands. However, there is a Korean brand Japanese restaurant in this mall. It is “Omuto-Tomato”.

Although the field research was done after peak lunch time, the floor was still very busy. Fuji was the busiest one as discussed in the previous section. The seats were nearly full with customers of all ages. On the other hand, a Vietnamese restaurant next door was empty and a Thai restaurant on the same floor was only 20% occupied.

On the Ground floor of this mall there is a casual restaurant area which displays authentic Japanese dishes.. The majority of the restaurants are Japanese as can be seen in Figure 16 and Figure 17.

Figure 16 Ground Floor, Central Ladprao (1)

15/06/2015 photo taken by author, Bangkok

Figure 17 Ground Floor, Central Ladprao (2)

15/06/2015 photo taken by author, Bangkok

Not all of the food in this shopping complex is Japanese. The food court located on the ground floor, close to the super market provides with reasonable price. However, Japanese food is also seen on this floor, such as Gindako, a Japanese “Takoyaki” vender, Ramen vender and Onigiri (Japanese rice balls) (See Table7). Some are too localized to recognize as Japanese food. It shows Japanese food is accepted tremendously by Thai people who do not need to distinguish if it is originally Japanese or Thai.

Figure 18 Japanese at food court area in Central Ladprao

15/06/2015 photo taken by author, Bangkok

Mahboonkrong Center

Mahboonkrong Center, known colloquially as MBK Center, is a large shopping complex located in Siam Square area, which is a center of tourism and fashion trends.

Although it has a considerably large number of tourists, the main customers are Bangkokians, especially young people. Table 6 shows that MBK center has a high percentage of Japanese restaurants whereas other malls in the neighbourhood, such as Siam Center or Central world, has a relatively low ratio of Japanese restaurants. MBK has more new chain restaurants or individual ones in addition to famous chains. 12% of total restaurants are Thai restaurants. This seems to imply that young Thai people are away from Thai food. MBK center represents young generation's preference and trends; the high ratio of Japanese restaurants stands for this generation's passion for Japanese food.

Central World, Siam Center and Mercury Ville

Central World, Siam Center and Mercury Ville all have relatively low percentage of Japanese restaurant (29-34%) although it is still high percentage.

Central World is the largest shopping complex in Thailand located in Siam (Figure 19). Siam Center is located in its neighborhood, which is a shopping mall with "Cutting edge technology" according to its official website[19], Mercury Ville is a mall which is featured on restaurants located in Chitlom area. These three malls have several things in common. First, they are located in the city center, which means it is practically in the same neighborhood; and a center of tourism and culture. Therefore, their customers include a certain part of tourists and foreign residents. Secondly, their budget level is "wealthy" or rich. Due to the location and the budget level, Thai customers prefer the area comparable to malls or residential area.

[19] http://www.siamcenter.co.th/about.php).

Figure 19 Central World

picture from official website[20]

In these shopping malls, restaurants that provided dishes of many nationalities are available in balance. Japanese restaurants are just one part of it.

Central Embassy, Emporium/Emquatier

Central Embassy is located in city center. Emporium and Emquatier. These are different malls but owned by the same company. Therefore, it is treated as one category in this research. The majority of customers are rich Thai people[21]. Both of the malls include lower percentage of Japanese restaurants (24-26%), high percentage of Western restaurants (38-43%) and low ratio of Thai restaurants (11-14%). It shows that authentic Western food is trendier than Japanese and Thai cuisine in these two malls.

[20] http://www.centralworld.co.th/th/events-activities-detail.aspx?id=2978

[21] I heard Thai people comment that the two malls were "too high spec". Even foreign expatriates say, "too expensive to go shopping there".

These Japanese restaurants are also clearly differentiated from those in other shopping malls. Table 8 shows the list of Japanese restaurants in Emporium and Emquatier. Except Fuji, every Japanese restaurants are there serves very authentic and expensive Japanese food. For example, “Tenyuu” is an individual high-end Sushi restaurant mainly for high class people. “Tenyuu-Sho” and “Tenyuu Sushi Bar” are operated by Tenyuu. Ginza Shabuten is an individual restaurant that serves import meat from Japan. “Ippudo” is a ramen chain from Japan. “Misoya” is a ramen chain from Japan, which established a joint venture with Thai capital. It had one shop in Japanese residential area for about three years, and later opened a new branch in Emquatier. According to the shop manager of Misoya, the customers of Sukhumvit branch are 70% Japanese but in Emquatier branch all the customers are almost Thais. Shio Yoshoku, which is a Japanese-western restaurant situated in Japanese residential areas has opened its first branch in Emquatier. As can be seen, Japanese restaurants in Emporium/Emquatier are mostly high-end, authentic Japanese restaurants which do not have many branches in Bangkok.. This suggests that authentic Japanese food is gradually accepted by upper-class Thai people, and their competitors are high-end Western restaurants.

Table 8 Japanese restaurants in Emporium and Emquatier

Name	Type
Aoi	General
Fuji	General
Fuji2	General
Mugendai Penthouse	General
Utaandon	General
Zaichi	General
Teraoka gyoza	Japanese-chinese
Mokuola Pancake	Japanese-Western
Pmme No ki	Omurice
Ippudo	Ramen
Nantsuttei	Ramen

Ramen Misoya	Ramen
Ginza Shabu Ten	shabu
Hokkaidon	Sushi
Tajima	Sushi
Tenyuu Sho	Sushi
Tenyuu Sushi Bar	Sushi
Gindako	Takoyaki
Maisen	Tonkatsu
Miyatake Sanuki Udon	Udon
Sio Yoshoku	western

Source : my field research on 12/6/2015

BigC/Tesco Lotus

Big C and Tesco Lotus are hypermarkets rather than shopping malls, where the major eating space is placed in food courts. Each restaurant in these hypermarkets have these characteristics: 1. low percentage of Japanese restaurants, 2. High percentage of Thai restaurants, 3, high percentage of Western restaurants. The high ratio of western food is caused by fast food restaurants, such as KFC and McDonalds'.

Table 9 List of restaurants in BigC and Tesco Lotus

BigC RamaIV	**BigC Ladprao**	**Tesco Lotus RamaIV**	**Tesco Lotus Ladprao**
BarBQ Plaza	Pizza company	Hachi ban	BarBQ Plaza
Chester's grill	BarBQ Plaza	Chester's grill	Chesters grill
Hachi ban	Hongmin	Fuji	Fuji
Hongmin	Hotpot	Kakashi by Oishi	Hachiban
KFC	KFC	KFC	KFC
Mcdonalds'	MK	Mcdonalds'	MK
MK		MK	Seefah
Oishi buffet		Seefah	
Pepper lunch			
Yam Saap			

Yayoi			
a Taiwanese restaurant (unknown name)			

Japanese restaurant

Source : my field research May-July 2015

This result shows that the traditional Japanese food chains mentioned in the previous section, such as Fuji, Hachiban and Oishi, have much influence on Thai people's daily life. It is seen as part of daily food. Figure 20 shows Japanese style food has been stocked in shelves by super markets and food courts. Japanese food are arranged and fused in people's daily lives.

Figure 20 Japanese meals in Tesco Lotus Hyper mart RamaIV

08/07/2015 photo taken by author, Bangkok

Figure 21 Japanese food at a food court in BigC Rama IV
08/07/2015 photo taken by author, Bangkok

So far Japanese restaurants were discussed in the perspective of shopping malls. The findings can be summarized as follows. First, the percentages of Japanese restaurants are higher in shopping complexes within residential area than those in the city center. This shows Thai people eat at Japanese restaurants during free time or weekends, with family or friends. The varieties are high in terms of dishes, budgets, or authenticity. The restaurants are mostly operated by large or middle sized restaurant chains, so that the quality is standardized everywhere. High percentage of Japanese restaurants and its diversification includes new types of Japanese restaurants in MBK center compared to other malls. The city center shows that young people are the center of spreading Japanese food. The trends in super luxury malls indicate very "authentic" Japanese restaurants; it has been accepted by mainly high-class Thai people as well as authentic Western restaurants. 'Authentic' does not mean only traditional Japanese dishes but also casual dishes such as Ramen or Tonkatsu, which taste exactly the same as Japan cuisine. The old chains such as Fuji and Oishi are significantly influential in hypermarkets, and Japanese meals are sold outside of restaurants. It shows localized Japanese food has taken root in ordinary people's life.

2.4 Difference between Japanese restaurants for Thais and those for Japanese residents in Bangkok

The discussion so far has been done mainly about mainstream of Japanese restaurants in Bangkok. However Bangkok has the other stream of Japanese restaurants, which are Japanese restaurants for Japanese residents. These have a longer history than those for Thai people. There is no doubt that these Japanese residents and Japanese tourists are in significantly important position as customers in Japanese restaurants industry of Thailand. “Japanese restaurants in Bangkok are busy with Japanese businessmen, the ones at Sukhumvit area are busy with Japanese expatriates’ wives every day”. (Tazatsu, 2008) .The purpose of this section is to show real situation of Japanese restaurants for Japanese people, then compare them with those for Thai people.

2.4.1 Creating a database for Analysis

The following procedures were done in creating a database for analysis.

1. A database of Japanese restaurants for Japanese residents was created based on advertisements in Japanese free magazines.
2. A database regarding Japanese restaurants for Thai people based on Wongnai.com. The data was taken from Thai customers’ online comments.
3. Lastly the two databases were compared.

Japanese restaurants for Japanese residents

Japanese free magazines are the source for the information from Japanese restaurants for Japanese residents. It is the major source for Japanese residents to search for restaurants to eat at. Therefore, free magazines are the best media to advertise newly opening restaurants. The owners target~~s~~ Japanese customers. Thus, the database for analysis was created by using the free magazines.

Below is the list of the free magazines distributed in Bangkok and the number of restaurants and advertisements in the sampling issues. The magazines include a large number of advertised restaurants and highlights. The chosen magazine were, “Bangmeshi”, “Thai JIYU LAND” and “DACO” because these three are free magazines which covers 70% of the total advertisements in all the available magazines. The data from the sample was used for making the database with the following procedures. First, I gathered all the Japanese restaurant advertisements in the three magazines; Secondly, I deleted repeated names of restaurants. Next, I categorized all the Japanese restaurants by types of dishes. The restaurants in this database will be labelled as “Japanese restaurants for Japanese residents”.

Table 10 List of free magazines and number of advertisements

Name of Magazine	Target	Advertisement of restaurant	Sampling number
WEEKLY WiSE	General	157	2015.2.11
Bang meshi	General	143	2015.8
Thai JIYU LAND	General	62	2015.4.20
Freecopymap	General	51	2015.2
DACO	General	22	2015.2.20
WOM	Women	22	2015.7
Bangkok Madam	Women	15	2014.10
Bangkok Life	General	13	2015.2.15
Bangkok Guide	Women	9	2015.2
nico labo	Women	6	2015.2
ArayZ	Business	4	2015.1
Arche+	Women	4	2015.4
Info Biz THAILAND	Business	4	2015.1
Newsclip	General	3	2015.1.25
U-machine	Business	0	2013.6
Per Gulf Thailand	Men	No data	

Advertizement of restaurant more than 50

Japanese restaurants for Thais

The database is based on names of Japanese restaurants listed in Wongnai.com. Wongnai.com is a restaurant review site which focuses on restaurants for Thais. I chose Wongnai.com because Wongnai provides statistic information based on mass reviewers. It shows rankings and is easy to search by budget, food category and so on. This enables me to analyze the data efficiently. The second reason is the creditability which is provided by JETRO. JETRO made a survey about Japanese restaurants in Thailand in 2015, and it uses data from Wongnai.com to provide the overview of restaurants parallel to data from their own research.

The database was created by listing the top 200 rankings Japanese restaurants in Wongnai.com. Then the top 200 was categorized into the same categories with Japanese restaurants. This database is labelled as “Japanese restaurants for Thais”.

2.4.2 Japanese restaurants for Japanese residents in Bangkok: Diversity and Density

A total of 243 restaurants (number of shops) are obtained for the database of Japanese restaurants for Japanese residents. The purpose of this section is to examine Japanese restaurants for Japanese residents; this includes varieties and locations.

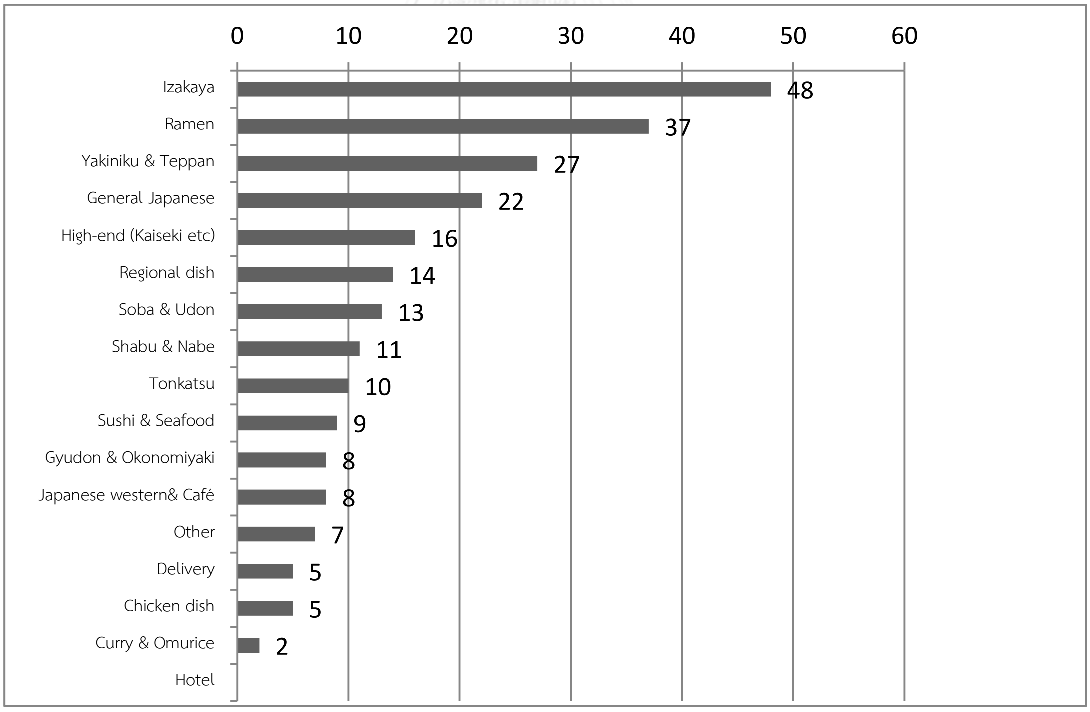

Figure 22 Japanese restaurants for Japanese residents by categories

Source : my created database

Figure 22 shows Japanese restaurants for Japanese residents arranged by main dish categories. Categorization is followed JETRO Bangkok (2015), modified by author. Izakaya is the largest category and Ramen follows. Izakaya is a kind of restaurant which serves alcoholic drinks and food. In some cases it is hard to distinguish it from general Japanese restaurants as they serve various kind of food. Alcoholic drinks are an important marker of “Izakaya”. “High-end” is a type of restaurant created, because in JETRO’s categorization “General Japanese” covered wide budget range. High-end restaurants serve the most authentic type of Japanese food such as Kaiseki. “Regional dish” is also added, which means food from specific regions. “Chicken” is another new category which provides mainly chicken dishes.

The result of the analysis shows that Izakaya is the largest category reflecting Japanese corporate culture. Japanese men frequently go out for dinner with colleagues or business partners after work. Normally Izakaya restaurants are busy with Japanese business men at night. Other than that, the chart shows different kinds of restaurants available for Japanese residents. They offer Japanese dishes and have Japanese staffs, Japanese speaking staffs, as was advertised in Japanese. The customers get the ‘feeling’ as if they were in Japan. Another important feature is a certain number of “regional dish” available in the restaurant. For example “Yokayoka” serves “Authentic Kyushu” cuisine; “Yama-Chan” offers “Tebasaki chicken” for which Nagoya is well-known. The customers can enjoy different regional dishes such as Osaka, Hokkaido, Okinawa, and Kyoto and so on. Thirty other restaurants are appealing specific regions of Japan. This variety of regional food is only available in limited large cities even in Japan.

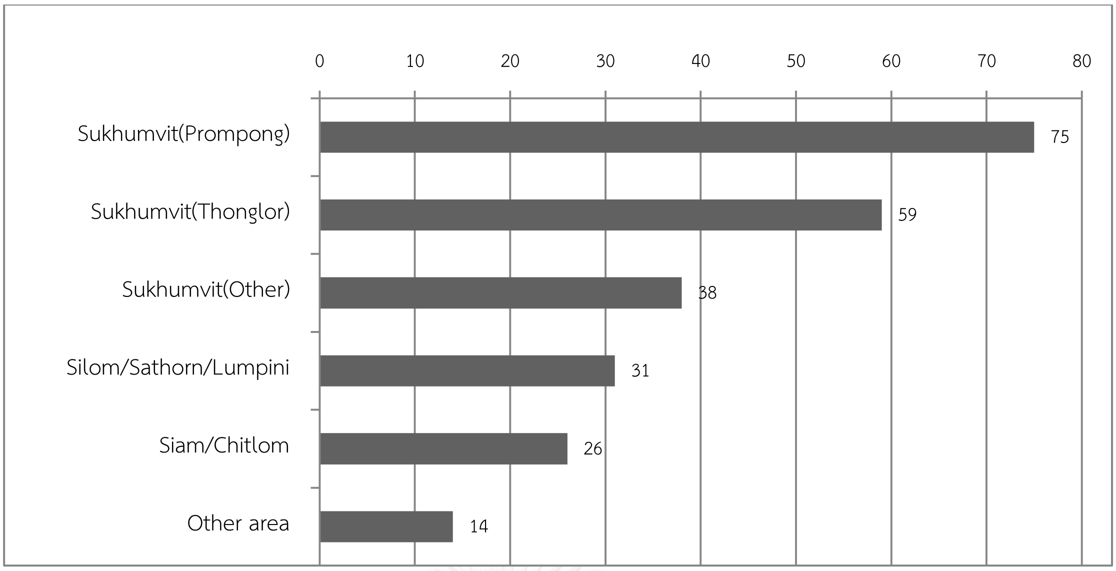

Figure 23 Japanese restaurants for Japanese residents by location

Source : my created database

Figure 23 shows the locations of the restaurants. More than two third of them are concentrated in Sukhumvit area, especially Prompong and Thonglor, the main Japanese residential area. Others are located in business areas, Silom/Sathorn/Lumpini and Siam/Chitlom). Some are in other areas. However, all of these are chains form main branches. The density is considerably high as 134 Japanese restaurants for Japanese people are in the smaller area of 3 square kilo meters from Prompong to Thonglor. Regarding the tenant type, 34% are located inside malls and the others are independent shops in streets. Those in malls are found only in large shopping complexes such as Central group.

2.4.3 Japanese restaurants for Thai people

The analysis of this part is based on data from Wangnai.com. By taking the top 200 rankings of approximately 1,400 restaurants. The table is labelled as “Japanese restaurants for Thais”. However, the center of budget ranges from 250 – 500 baht (48%), 23% is over 500 baht. The restaurants in this group are considered more for special occasions than for daily eating.

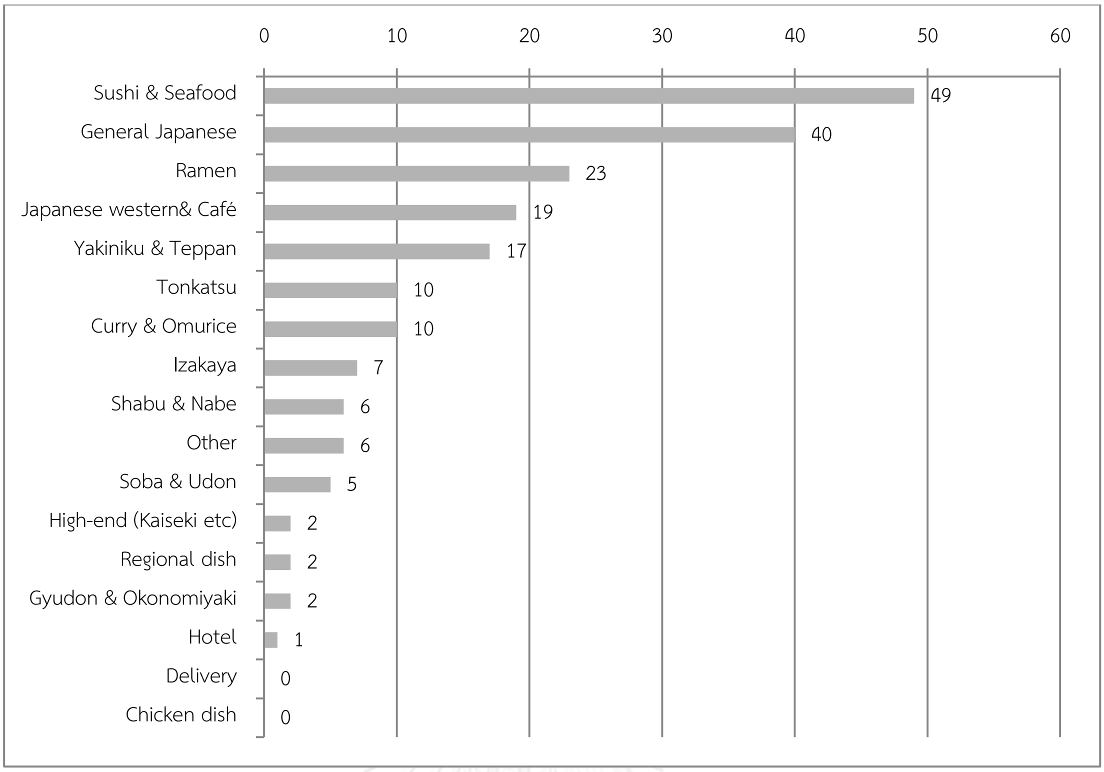

Figure 24 Japanese restaurants for Thais, arranged by categories

Source: my created database based on Wangnai.com

First of all, Sushi and Seafood are predominant. One possibility is that statistics method, such as "Shabu and Sushi buffet restaurant" are classified to "Sushi and Seafood". The second possibility is that there might be rapid changes in the last few years. T.A., a senior manager of a western company, commented "Japanese BBQ (Yakiniku) is popular nowadays". It is also significant that some of "Japanese-western" restaurants are classified as "Japanese restaurant" in Wongnai.com. It means Japanese style western food is getting accepted as Japanese food. The "regional dish" restaurants are ranked in different area such as "Okinawa" cuisine and "Nagoya" cuisine. The fact indicates "Japanese food" in Bangkok continues to evolve to a broader range.

The result of the comparison of the two types of Japanese restaurants shows large differences.

“Japanese restaurants for Thais” shows popularity on a certain kind of dishes, such as Sushi and Sashimi, Japanese Western and café. On the other hand, “Izakaya” is not popular among Thais, but has the opposite effect on Japanese residents. See (Figure 24). Thais do not drink alcohols as Japanese’s do, which would explain why “Izakaya” is not popular among Thai people. Also, Izakaya is connected to Japanese corporate culture of eating and drinking after long hours of work, whereas Thai middle class people do not go out drinking after work. Thai working class people drink alcohols, but not at Izakaya.

Figure 25 Japanese-western restaurant (Mercury Ville)
22/05/2015 photo taken by author, Bangkok

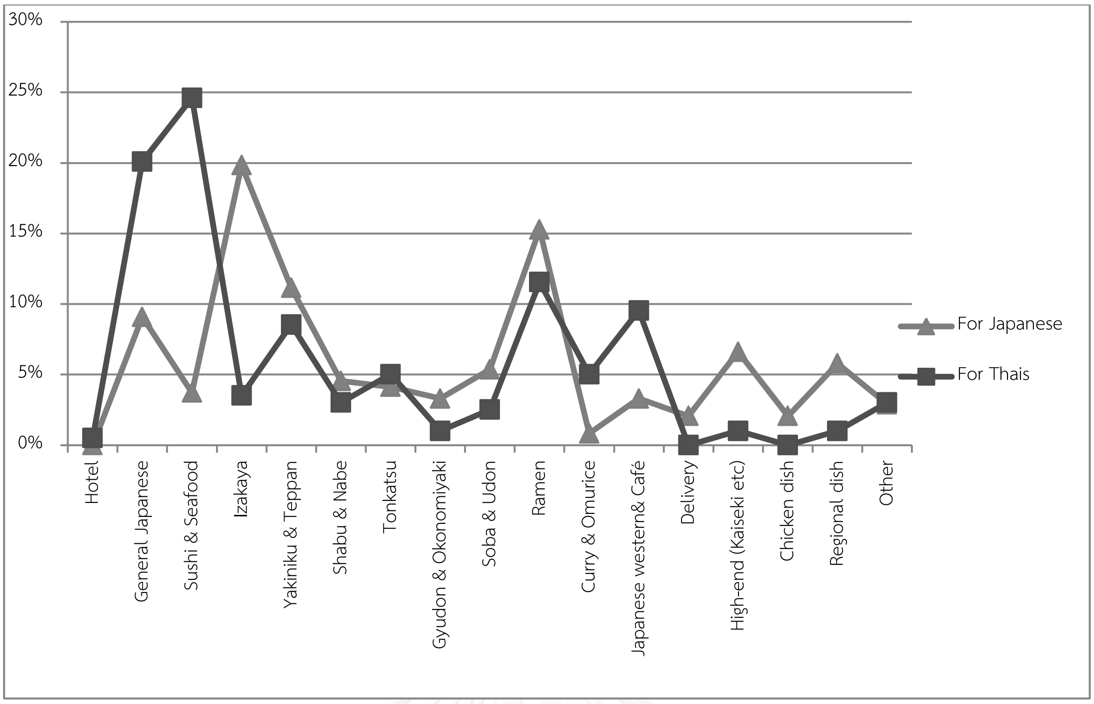

Figure 26 Comparison of categories between JP restaurants for Thais and for Japanese

source : my created database

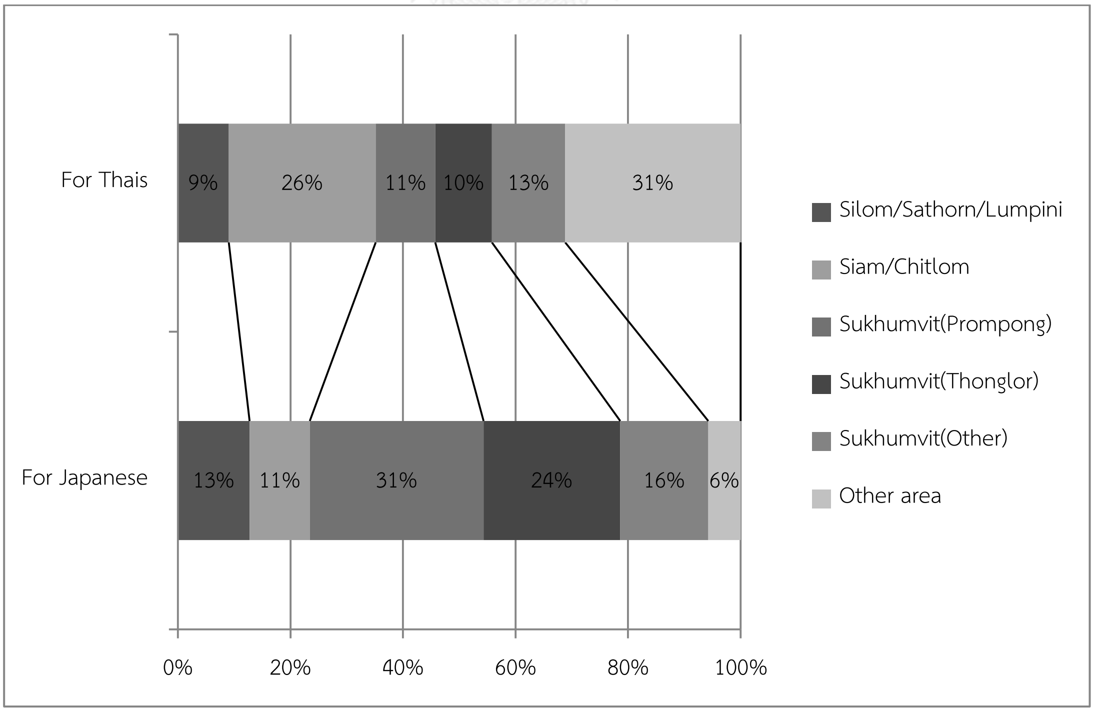

Figure 27 Comparison of location between JP restaurants for Thais and for Japanese

source : my created database

Figure 27 compares the location between the two databases. It is not surprising that restaurants for Thais are concentrated in shopping areas and residential areas. On the other hand, those for Japanese are concentrated in Japanese residential areas. About 34% of the restaurants for Thais are in Sukhumvit area. This means Thais and Japanese residents share same restaurants, or there may be segregation in the same area.

2.4.4 Integration and Separation of Japanese restaurants for Japanese people and those for Thai People

The data shows that 27 restaurants out of 199 restaurants in the database of Japanese restaurants for Thais are overlapping with those for Japanese restaurants for Japanese residents. It means less than 15% of restaurants are shared by Thais and Japanese residents. Even those which are in Sukhumvit area, 52 restaurants out of 65 in the Wongnai.com database are not seen in Japanese free magazines. This means the majority of popular Japanese restaurants for Thais do not match those for Japanese residents and in Sukhumvit area, in other words a kind of distinction exists.

The reason for the distinction can be inferred that Japanese residents prefer authentic Japanese style but Thai peoples prefer localized style. It is true to some extent, the number of low-end Japanese restaurants serves “Japanese dishes” which are far from authentic Japanese. Japanese customers are not seen in the 4 chains as they are deeply integrated into Thai society. However, JETRO states that “In posh Japanese restaurants, Thai’s and Japanese customers are reversed. The majority of customers of the most posh Japanese restaurants in Bangkok are mainly Thais. Japanese people hesitate to order expensive dishes as they compare the prices back to Japan and their price range in dishes. The wealthy Thai people never care about the cost range in order to obtain delicious and high quality food”. (2010) JETRO introduces a posh sushi restaurant “Honmono Sushi” as an example. “Honmono

Sushi”[22] opened the first shop in Thonglor area in 2009 and opened another 4 shops in Bangkok. Its concept is “A restaurant where real sushi is available without going to Japan”. “In order to provide real sushi, 95% of sushi ingredients are air freighted from Japan and salmons are imported from Norway”. The owner said he does not see the need to localize the taste because “Wealthy class of Thai consumers have visited Japan many times and eaten Fresh ingredients imported from Japan. Their requirements are the same taste provided in Japan only. But some regular customers prefer richer taste; in these cases we provide flexibly arranged food for them.”

“Y” is another famous restaurant, which is well-known among Japanese women, as well as aiming to attracting wealthy Thais for dinner. Respondent J.E., a cook in “Y” commented, “Japanese wives only come at lunch time for ‘lunch sets’. At dinner time, most customers are rich Thai people, and a few Japanese businessmen. Thai people order the day’s recommended dishes without worrying about the price.”

I did field research at another famous sushi restaurant in Prompong area, which is ranked in one of the top groups by Wongnai.com. The customers seem to be all Thais except a few westerners. According to a waitress, they rarely have Japanese customers. It has various kinds of rolls as recommended menus in addition to standard type of sushi (Figure 28). Not only rolls, but “Nigari-sushi” is in unique style: they are complicated compared to authentic Japanese sushi which pursue simplicity.

[22]Honmono means “real” in Japanese.

Figure 28 New types of Sushi

11/6/2015 photo taken by author, Bangkok

A Japanese women and myself both tried it and we both agreed that "It is tasty but completely different from Japanese sushi." Sushi has evolved to unique to suit the taste and need of 'Thai style'. This kind of sushi is seen frequently in posh sushi restaurants for Thai people including "Honmono Sushi".

As investigated, distinction between Japanese restaurants for Japanese and those for Thais cannot be denied. In business and Sukhumvit area, the majority of restaurants focus on either Thai customers or Japanese customers. However, in these areas a new type of restaurants for Thais has a certain position, especially those that sell sushi. Thai people have created unique sushi, which are arranged to match their taste. It does not target Japanese residents in Bangkok. Japanese residents are not willing to pay so much, because they not as wealthy compared to old days. (This point is discussed in the next chapter.)

However, both people's worlds are not separated completely. Some of the restaurants overlap in both databases. In some cases both Thais and Japanese residents are customers, as shown below.

1. Organized Japanese restaurant chains which are from Japan e.g. Miyatake Udon, Coco Ichibanya, Ippudo Ramen, Maisen Tonkatsu

These are well-known popular chains in Japan. They advertise themselves to Japanese residents when they first came to Thailand; however their real target is Thai people due to the size of the markets. Some do not promote themselves to Japanese residents; however, Japanese people naturally go to eat there due to the brand names. Independent Japanese restaurants owned by private Japanese people; in this case they unintentionally promote themselves to Thai people, and now they are well-known to Thais.

2. J.G, who has owned Yakitori restaurant in Silom area for more than 20 years, says, "Nowadays young Thai customers began to come somehow. To be honest, my regular customers (Japanese businessmen) are bewildered (due to the different atmosphere)." In this case it became well-known by Thais without any intention or advertisement made. Thai people are quite active and use social networks, if one happens to find a good restaurant, the restaurant will become known among many other people in the same network, even if the owner does not promote himself proactively. On the other hand, there are some cases where the owners proactively promote themselves to Thai customers. J.A, an editor of Thai JIYU Land says that M, an old restaurant in Silom area is a case of successfully shifting their customers from Japanese residents to Thai residents. J.J, who owns an authentic high-end restaurant in Sukhumvit area, says that currently his customers are 99% Japanese; however, he is intending to increase Thai customers to 50% from now on.

As discussed so far, Japanese restaurants for Japanese residents and Thais used to be separated from each other. The Thai restaurant chains offer affordable prices, localized taste, such as glamorous sushi restaurants that attract mainly Thai people. As for the authentic Japanese restaurants, they are owned by the Japanese people in the Sukhumvit area. They attract Japanese residents. However, later integration is found to some extent, especially in the city center area as a result of changes in both Thai side and Japanese side. In the following chapters, the changes in both sides which influenced the situation are examined.

CHAPTER 3

Changes in the Japanese society within Bangkok and its influence on the Japanese restaurant industry

In this chapter I examine Japanese restaurant industry from Japanese community's perspective. The question I ask is how the Japanese community in Bangkok has changed and how it influences the Japanese industry. The content that I will present in this chapter is divided into 4 sections: 1) Expansion of the Japanese community in Bangkok; 2) Diversification of the Japanese community in Bangkok; 3) Expansion of residential location; and 4) Influence of changing Japanese community on Japanese restaurant industry in Bangkok.

3.1 Expansion of the Japanese community in Bangkok

According to the statistics from the Japanese embassy of Thailand, Thailand has 64,285 Japanese residents, who are officially registered in the Japanese embassy as of 2014. It's the seventh largest population of Japanese overseas as residents. Even the numbers of people who have not registered are included.

As shown in Figure 29, the population of Japanese residents has been continuously growing since the 1970s. It boomed after Plaza Accord[23] in the late 1980s. In spite of the global financial crisis in 2008, and the flood in 2011, the series of political issues has been unsteady in Thailand. The Japanese community has been rapidly growing so that the population became triple from the year 2000 - 2014.

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[23] Plaza Accord is an agreement on currency rate signed by 5 governments on September 22nd, 1985. Japanese yen was drastically against US dollars. It weakened competitiveness of Japanese export, and as the result triggered oversea expansion of Japanese companies.

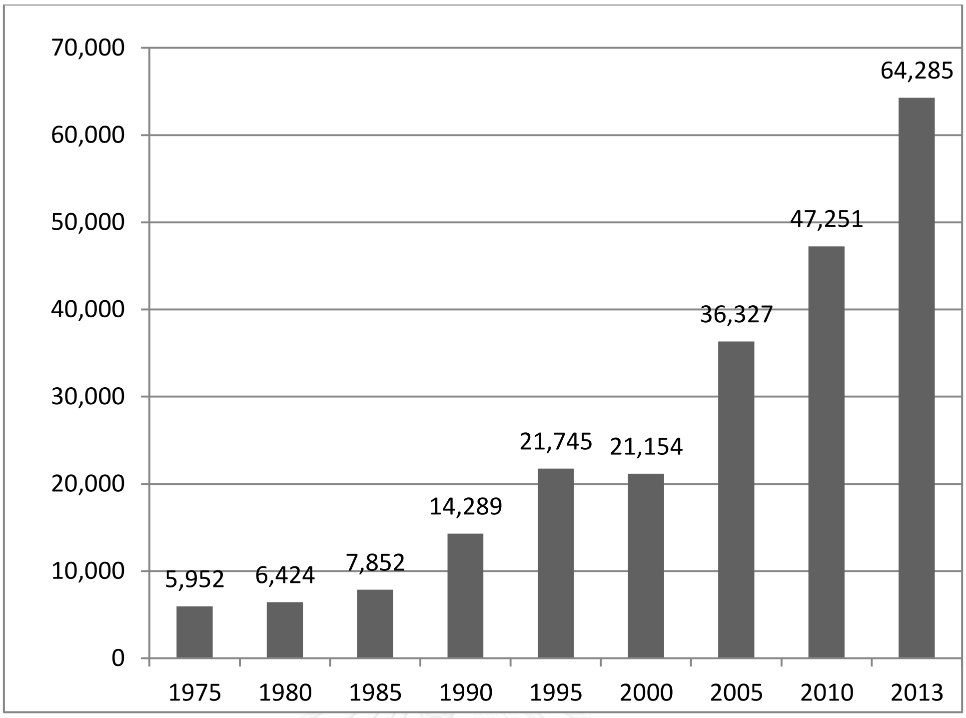
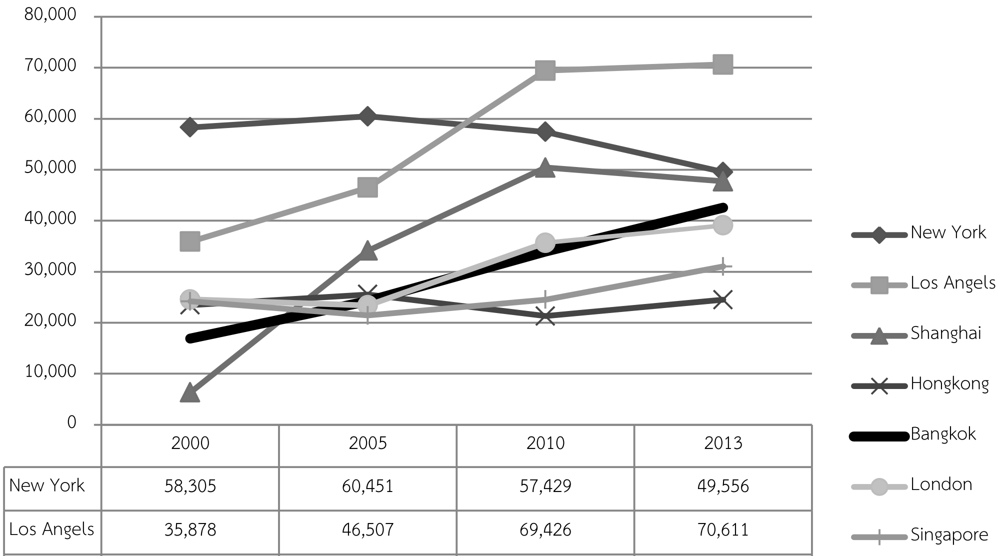


Figure 29 Transition of Japanese resident's population in Thailand

Source: Ministry of Foreign Affairs. (2013)

Of all the Japanese residents in Thailand from the year 2014, 72% of them live in Bangkok. When looking at the Japanese population from the oversea cities, Bangkok ranks the fourth following Los Angeles, New York and Shanghai. Figure 30 shows the transition of the Japanese population in the top 7 cities from the year 2000s. Bangkok city is where Japanese population has been increasing continuously, but in some of the other cities it has been shrinking. The Japanese community in Bangkok is one the largest in the world and is rapidly increasing, as shown in Figure 30.



	2000	2005	2010	2013
New York	58,305	60,451	57,429	49,556
Los Angels	35,878	46,507	69,426	70,611
Shanghai	6332	34,122	50,430	47,725
Hongkong	23,480	25,541	21,297	24,517
Bangkok	16,866	24,260	33,967	42,577
London	24,550	23,402	35,662	39,098
Singapore	24,186	21,437	24,548	31,038

Figure 30 Japanese populations in top 7 cities from the year 2000-2013

Source: Ministry of Foreign Affairs. (2013)

In another perspective, the Japanese community is overwhelmingly the largest foreign community in Thailand. This reflects a strong economic relationship between Thailand and Japan. According to Thailand statistics, Japanese investment is 59% of the total foreign investment in 2014. As a result, in the ranking of the numbers of work permits, Japanese is the first in number. (Table 11).

Table 11 Numbers of foreigners working with work permits by nationality in the year 2006

Rank	Country	Total
1	Japan	21,541
2	China	10,320
3	India	8,893
4	England	8,882
5	Myanmar	8,183
6	US	6,562

Source : News clip.(2006)

This fact indicates that Japanese community in Thailand is one of the largest, also the biggest foreign community in Thailand.[24]

3.2 Diversification of the Japanese community in Bangkok

As it rapidly expands, the members of the Japanese community have been diversified.

Akagi(2013) states in Tai-koku Nihonjinkai-Shi [*100 years history of Thailand Japanese association]* as follows.

> Japanese residents were composed of two categories; the first is "Permanent residents" and the second is "Expatriates". However in the last ten years Japanese people who belong to various types of categories, such as "local staff (employees under local contracts)" instead of "expatriates" [...] those who do not engage in economic activities have been increasing since 1990s. It includes those that are married to Thai partners or students, and also many of "floating people" who do not do anything.

[24] Workers from Laos, Myanmar and Cambodia are not included due to different types of visa.

Table 12 shows a classification of officially registered Japanese residents from 1998 to 2014. As can be seen, private sector employees are the majority in this case; however, the percentage has decreased from 83% to 74%. In contrast, academic involvement and others have increased. The details of "Others" are unknown, but it would include retired older peoples or ones who are looking for jobs. Officers and families have been dramatically decreasing. The number of officers, who are the most privileged classes in the Japanese community, has decreased while that of the non-privileged people, such as retired elders or students, has increased.

Table 12 Japanese residents and reasons why they want to stay in Bangkok (1998-2014)

Periodical resident	2014		1998	
Employees and families of private sector	47,472	74.2%	18,736	83.3%
Journalists and families	245	0.4%	103	0.5%
Selfemployments and families	2,471	3.9%	679	3.0%
Students/scholoars and families	2,919	4.6%	467	2.1%
Officers and families	835	1.3%	916	4.1%
Others	8,849	13.8%	1,315	5.8%
Sub total	62,791	98.1%	22,216	98.8%
Permanent resident	1,224	1.9%	265	1.2%
TOTAL	64,015		22,481	

Source : 2014- Japanese embassy of Thailand 1998- Kusaka, 1999

However, a crucial diversification is ongoing within the category of 'Employees and families of private sector'. As *Akagi* described, the number of Japanese employees under local contracts has been increasing since the early 2000s. According to a respondent J.B., Japanese employees under local contracts ("local staff") were limited to service in the industry, such as real estate agents. Actually, there were not cases that enterprises hire "local-Japanese staff" around 1994 when he started the current business in Thailand. Hiring "local staff" in enterprises started in the late 1990s and gradually increased through the 2000s. The first local staff members were female administrators and male sale coordinators. This is to reduce the workload of expatriates. Compared to expatriates who are paid for oversea allowances, for accommodation, school tuitions, and so on in addition to the salary in Japan, “local staff” employees paid much lower. J.B, a president of a job agency, who has been running business for more than 20 years, said, “They were considered to be *kawaiso* (pity)” as their financial gain was extremely different from that of expatriates. However, the number of “local staff” has been increasing. This means the local Japanese staff is now a large part in the Japanese community. J.B., states that it has been estimated that there are 3,000-4,000 Japanese female employees under local contract with the Japanese enterprises in Bangkok, compared to 10,000 males. The total number of those who have work permits, is estimated to be around 35,000[25], therefore, over 30% of Japanese employees is supposed to be “local staff” in 2014.

Increasing in local staff is not only the reason of diversification. There is a larger gap among expatriates as well as the gap between local staff and expatriates has been shrinking, as pointed out by J.B. below.

> In the 1990s, enterprises who invested in Thailand were large trading companies, banks and manufacturing companies, therefore expatriates were generally elites. SMEs are the main investors in Bangkok. In some cases expatriates are paid less than 100,000 THB per month, which is not enough to support their families. Therefore, young and single expatriates have been emerging. Besides, some companies even go without expatriates, for example, companies which are 100% established in Thailand.

J.L. who works as a job agent, observed the quality of young Japanese job seekers have changed in the last few years. She observes that there are more young people who come to Thailand to pursue their career, which is different from that of

[25] In 2007, 24,312 people stayed in Thailand with work permits as Table 10 shows. This is 74% of the total population of “employees and families in private sector” (source from Japanese Embassy of Thailand). If applying this same rate to 2014 (Table 11), the number of people staying in Thailand with work permits is estimated to be 35,129. The other 26% would be their families.

traditional job seekers, who take whatever jobs they can get hold off to make a living in Thailand.

The following facts support the above observations.

1. Investment amount per case tends to decrease since 2007.

In the period from 2001 to 2010, although the number of approved BOI cases by Japanese capital increased, the amount of Japanese investment has not been increased. In other words, investing amount per case has decreased in the period. It indicates that Japanese Small and Medium-sized enterprises (SMEs) are proactively investing in the last several years instead of Multinational Enterprises (MNEs).(Tomohiro, 2012) . This supports the fact that elite expatriates working for large enterprises have decreased and less privileged Japanese workers have increased.

2. J.J., an owner of a Japanese restaurant stated that "Younger customers are continuously increasing since he opened his restaurant in 2003, and customers come to care more about cost instead of quality." This also supports the fact that Japanese residents are getting less privileged so that they are more budget-conscious.

3. Japanese school pupils against the total number of residents

Normally Japanese residents send their children to Japanese schools. There are some exceptions, such as sending them to international schools. However, it is still rare. Figure 31, shows the ratio of Japanese school student (primary and junior high school) against the total population of Japanese residents. Although the number of Japanese school students in Bangkok is the second largest in the world, it is clear that the ratio of the students against the whole population is decreasing. In short, the number of typical expatriate families has been decreasing, and that of different types of residents, such as older couples, single people or families who send their children to international or local schools have been increasing.

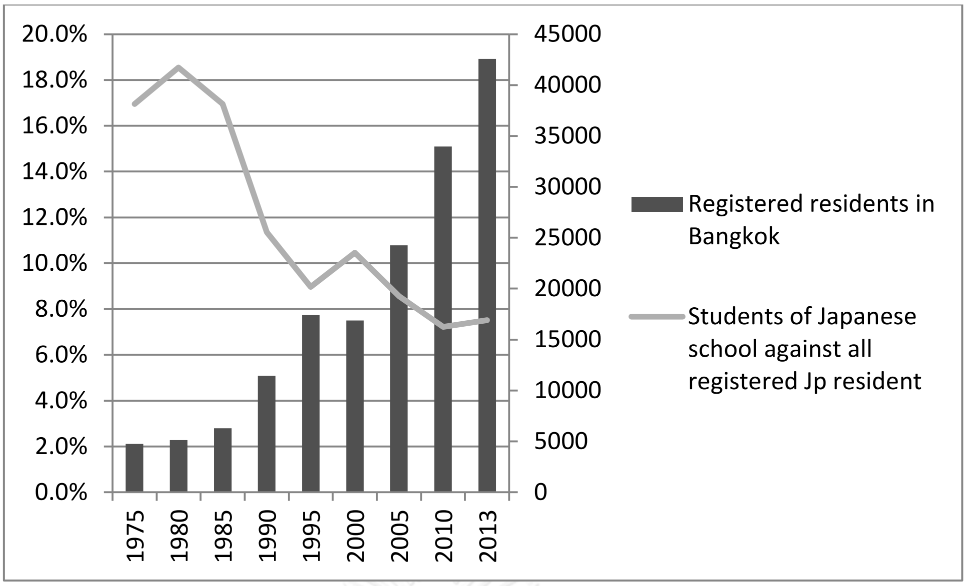


Figure 31 Ratio of Japanese school students against all registered residents in Bangkok

Source: Ministry of Foreign Affairs. (2013), Akagi (2013:71) Population in Bangkok is estimated as number of Japanese resident in Thailand x 0.8 for year 1995 and before.

5. De-united Japanese community

The Thailand-Japanese association (or the Japanese Association) is a mutual-aid organization for Japanese people who live in Thailand. According to *Akagi* 2013, this association was re-established after the world war in 1953, and the number of its members continued to increase until the late 1990s. Japanese population in Thailand has increased in the 2000s; the number of members was 9,002 households against 21,154 registered Japanese residents. That means most of the Japanese residents were members of the association. J.F. who had lived in Bangkok since the early 1990s remarks that "all the Japanese people more or less knew each other and everyone was on the list of the association." However, despite the growth of Japanese population, the number started to decrease in the middle of the 2000s. J.F. said, "The information from the association, such as newly opened Japanese restaurants, was precious. However, after the 2000s, such information became available on the internet or in free magazines. New members of the Japanese association decreased rapidly and current members are all those who have been in Thailand for a long time.”

The Japanese association was useful in the period of the homogeneity and accessibility to information is limited. However, as a result of information technology, the unity under the Japanese association is weakened.

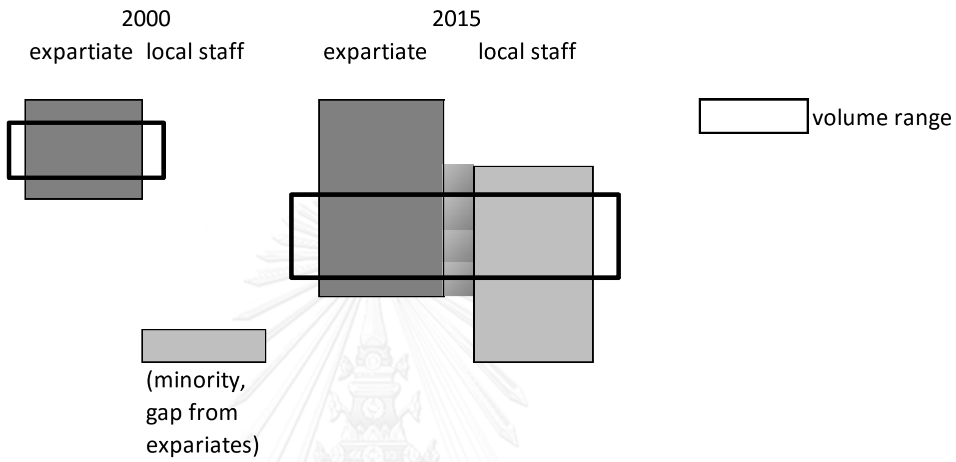


Figure 32 Model of JP expatriates and local staff in 2000 and 2015

Figure 32 is a model which summarizes this section. The composition of Japanese people in Bangkok has changed from the year 2000 to 2015. First, “local staff” increased. Second, the range of expatriates became broader, advancing to the lower direction. Third, the range of “local staff” became broader expanding to the upper level. Last the border between the expatriates and the local staff became unclear. As a result, the community has changed and diversity has increased significantly. The purpose to stay, age range, life style and cost of living of the Japanese in Thailand varies. It is not feasible to unite the people under one label “Japanese community”. People that are single have been increasing and their living standard is slowly going downhill from privileged to ordinary class. Thus, such changes in the Japanese community in Bangkok were likely to cause changes in Japanese restaurant industry. This happened from the 1990s to present, High-end restaurants for "*Settai*" used to be flourished in the 1990s, but they declined after the economic crisis in 1997. A percentage of the "privileged" Japanese expatriates, who goes out for dinner around the business area has been decreased. More analysis on the factors that cause changes in the Japanese restaurant industry is presented in the following section.

3.3 Expansion of residential location

The majority of Japanese residents in Bangkok lived in the Asok-Prompong area, since the Japanese school moved to Rama 9 road in the 1970s. However, due to the rapid growth of the Japanese population in the 2000s, the residential area expanded to the Thonglor area, especially the area from Sukhumvit Soi 39 to 49 in Prompong and Thonglor where apartments for Japanese people are concentrated, like little Japan. It further expanded to Ekkamai area in the late 2000s. According to *Thai JIYU Land*, a Japanese free magazine, more Japanese people have started to live in Prakanong and On Nut area recently. Young single people choose this area due to the limited cost, but expatriate families normally do not live in this area(Thai JIYU Land, 2015). Ekkamai, Prakanong and On Nut are also residential areas for Thai people; therefore, geographically the emerging Japanese young residents are integrated to the Thai community.

3.4 Influence of changing Japanese community on Japanese restaurant industry in Bangkok

In this section I will show how the expansion and diversification of the Japanese community, and how it has influence on the Japanese restaurant industry in Bangkok.

The number of Japanese restaurants is estimated to be approximately 40 in the 1990s. (Estimation based on restaurant owners, J.G and J.H, personal communication, 2015). Approximately, there were 110 restaurants in 1996. (Estimation based on *Hello Thailand*, a Japanese phone directory).

There were 200 more restaurants in 2002. (Estimation based on *Hello Thailand*). This gradual increase of Japanese restaurants is obviously connected to the increasing Japanese population. It increased to over 500 restaurants in 2007 as shown in 2-1 and started booming, but the basis for the boom was already developed before the boom itself through growing Japanese community. In terms of variety, the turning point came after the economic crisis in the late 1990s. Before that, the main customers of Japanese restaurants were Japanese expatriates who dined out for during company business. It is called *Settai,* which is translated as entertaining business partners in restaurants, or other places for smooth business agreement. A large amount of money was spent by businesses that use '*Settai*' in Japanese restaurants near business like areas. However, due to the recession and improving compliance[26], *Settai* has been decreasing consistently. Until the middle of the 1990s, the majority of Japanese restaurants served high-end and authentic Japanese food for '*Settai'*. These restaurants that used '*Settai' were* later closed down due to the economic crisis.

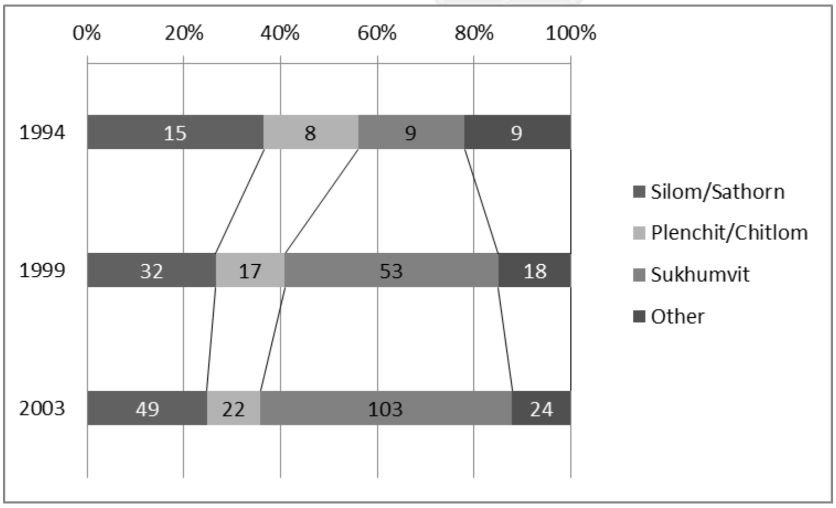


Figure 33 Japanese restaurants by location, 1994-2003

Source: The author created data based on '*Hello Thailand 1994/1999/2003'*[27]*,* excluding Thai chains of Fuji, Oishi, Zen, Hachiban and Daidomon

[26] National Public Service Ethics Act was enforced in 1999 in Japan so that *settai* to officers were prohibited.

[27] Hello Thailand is a Japanese phone directory published by COMM PTE.Ltd annually.

Figure 33, shows the Japanese restaurants by location from 1994 to 2003. In order to simplify the discussion, the restaurant chains for Thais such as Fuji, Oishi, Zen, Hachiban and Daidomon are excluded in the figure. The total number of restaurants increased rapidly and new restaurants in business areas, such as Silom or Plenchit are clearly less in residential area, which is in Sukhumvit area. This indicates that there were increases in the demands for casual and private restaurants. This period is when “local staff” started to increase. A symbolic fact is the opening of *Nihonmura* in Thonglor area. Although Thonglor area is located towards the end of the city, new *Izakaya* restaurants offers tasty food with reasonable prices, and they are successful. Along with the expansion of the Japanese community in Sukhumvit, the Japanese restaurants increased in the same area. Apparently, the competition between the restaurants gradually increased; so new ideas and themes were added to distinguish themselves. This will make them unique and more recognizable. In the middle of the 2000s, special and unique restaurants, such as Yakiniku, Ramen and so on according to a back issue of *Bayspo* as of Mar 2006, emerged. However, most of them were individually owned small restaurants until Ootoya opened its first branch in Thonglor in 2005. The existence of these ‘authentic’ Japanese restaurants is clearly the base of Ootoya in choosing Bangkok city at that time, which triggered a big boom of Japanese food in Thailand as described in chapter 2. The boom was also due to the changes in the local society. However, the fact that there was a Japanese cuisine industry created by Japanese residents is an important factor of the boom.

3.5. Emergence of Thai Cooks that prepare Japanese food

Another important fact that affects the Japanese community is the emerging of Thai cooks that prepare Japanese food. Due to the long history of the Japanese community in Bangkok, Japanese culture of ‘*Settai’* are based on high-end Japanese restaurants. The boom was from the 1980s to 1990s. Thai cooks who were originally trained in these restaurants, became major contributors to the Japanese food boom. The owners of *Honmono sushi*, “developed their career in Japanese restaurants in

Thailand as cooks for more than 20 years” and “had aimed at opening their own restaurants for a long time”(2010). *Honmono sushi* was the achievement of their careers and their dreams. J.E. A Japanese chef of a high-end Japanese restaurant, which is popular for high-class Thais, comments about his Thai colleagues: “All of them have worked at Japanese restaurants in Bangkok since they were young. They have good skills of cooking Japanese food”

This means a long history of the Japanese community is indirectly contributing to the Japanese food boom. Due to the fact that well-trained Thai cooks have become very skilful chefs in producing Japanese foods. In this case, Thais chefs who have been trained in authentic Japanese restaurants, are likely to finally achieve their long term goal of owning their owned restaurants.

There is another example of a Thai chef who realized his dream. After he was trained in an old Japanese restaurant for some years, T.Z. became the owner of a Japanese food stall in On-nut square (Figure 34). On-nut square is located next to On-nut station, where there are numerous stalls including stalls selling Thai food and various kinds foreign food. He opened his shop after developing his skills in the authentic Japanese restaurants. He was in the Japanese community for 19 years and chose the area to open his own shop. He knows that many foreign customers goes there. The fact is that more than half of his customers are non-Thais, but regular Japanese customers and one of them said “Sushi here is tasty enough for Japanese”.

Figure 34 A Japanese stall in On-Nut square

9/10/2015, photo taken by author’s friend, Bangkok

If it happened 10 years ago that a Thai person owned a Japanese stall that served Japanese food at reasonable prices, Japanese residents would not eat there. Japanese authentic restaurants in early days cultivated good skilled chefs and it took a long time. At present, as a result of long time training, there are Thai cooks that can make good Japanese food, and they contribute to spreading various levels of Japanese restaurants in Bangkok. Japanese customers have been more integrated to the Thai community; this triggers a change in the Japanese community.

CHAPTER 4

Changes in the Thai society and its influence on Japanese restaurant industry

In this chapter I investigate the influence of the changes in the Thai society on Japanese restaurant industry in Bangkok. The questions asked is how Thai society has changed in terms of financial conditions and their life styles. How have these changes influence the Japanese restaurant industry? This chapter is divided into 3 sections:

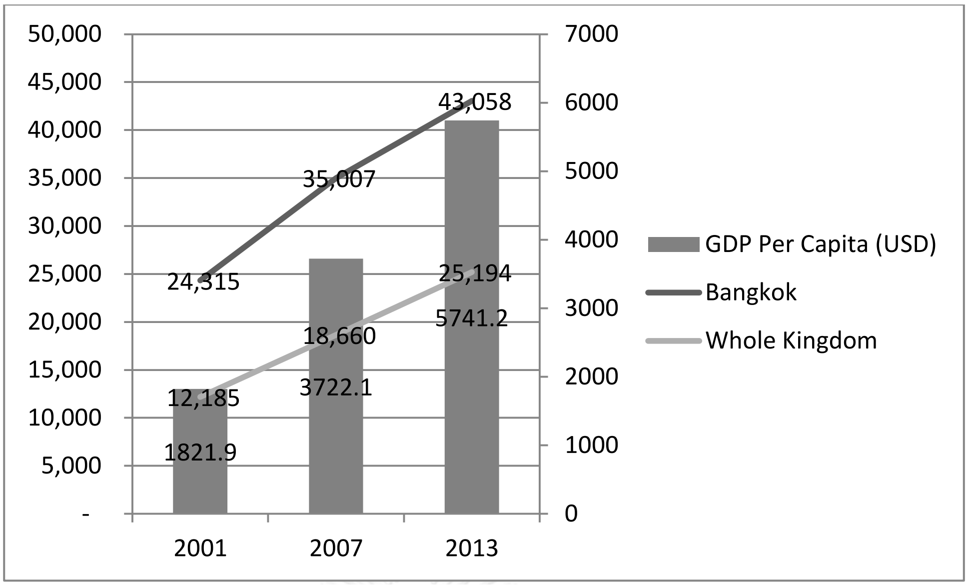
1) Financial growth of Thai people and expansion of middle class in Bangkok;

2) Influence of Bangkok's financial advantages on expenses when eating at restaurants;

3) The expansion of Japanese restaurant industry due to Thai people's life styles.

4.1 Financial growth of Thai people and expansion of middle class in Bangkok

JETRO survey shows that Thai people have a 'high class standard' impression of Japanese food. In fact, Japanese food at restaurants costs at least 70 baht for one bowl of Ramen at Hachiban Ramen, Thai people consider that it is a reasonable Japanese food chain. However, Thai food is always available around 40-50 baht. The popular Japanese restaurant chains, such as Fuji, Ootoya and Oishi cost around 250 to 500 per person according to Wongnai.com, Although Japanese food is more expensive than Thai food, people are spending more money on Japanese food. The reason is given below.



Source: National Statistical Office of Thailand, household socio economic survey

Figure 35 GDP Per capita and average household income: Whole kingdom and Bangkok

Figure 35 shows the growth of GDP per capita of Thailand and an average of household monthly income. (whole kingdom and Thailand). As can be seen, GDP per capita increased from 1,822 USD to 5,741 USD from 2001 to 2013 by about 215%. The average household monthly income in the whole kingdom has risen significantly from 12,185 THB to 25,194 baht by about 107%. When looking at the average household income in Greater Bangkok area, it has increased from 24,315 baht to 43,058 baht by about 77%. The volume ranges of monthly income for Japanese workers with local contracts are 50,000 baht. This suggests that the standard of living for Japanese residents in Thailand and Thai people have gotten closer.

Table 13 Socio-economic class in the whole kingdom and Bangkok

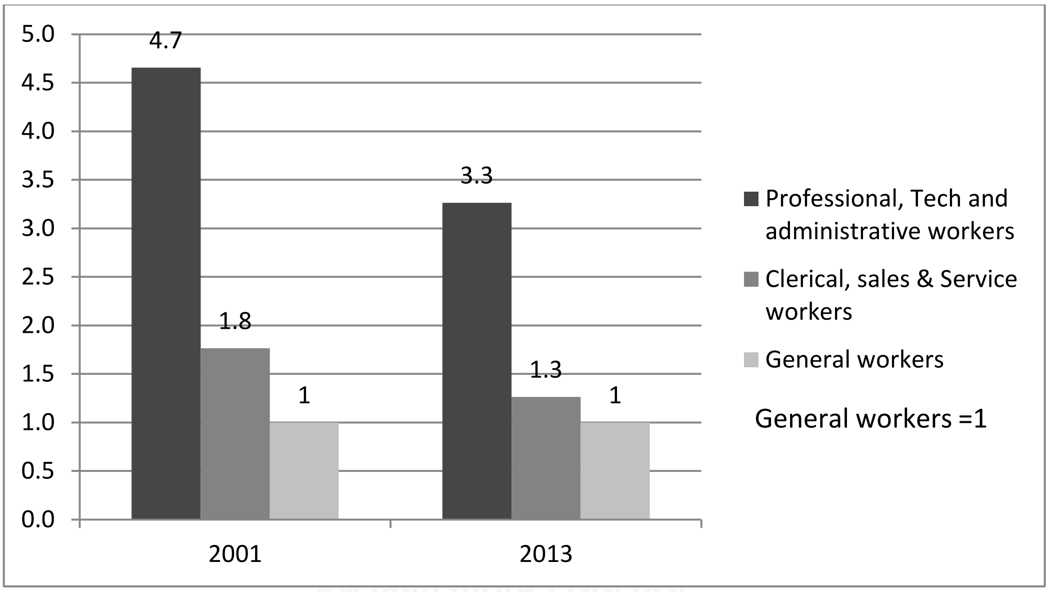
	Whole Kingdom				
Socio-economic class	**1990**	**2000**	**2010**	**2015**	**2015 (Bangkok)**
1. managers, senior officials and legislators	2%	3%	3%	4%	9%
2. Professionals	3%	4%	4%	6%	11%
3. Technicians and associate professionals			4%	5%	9%
4. Clerks	3%	4%	4%	4%	8%
5. Service workers and sell goods	13%	18%	17%	20%	26%
White collars	**20%**	**29%**	**33%**	**38%**	**64%**
6. Skilled agricultural forest and fishery workers	63%	48%	38%	28%	1%
7. Craft and associate professionals			11%	12%	12%
8. Plant and machine controlors and assemblers	16%	21%	8%	10%	13%
9. Elementary occupations			11%	11%	10%
10. Workers not classifiable by occupation	1%	3%	0%	0%	1%
Blue collars	**80%**	**71%**	**67%**	**62%**	**36%**

source : National statistical office of Thailand

Table 14 shows that the overall income has increased in the whole kingdom and in Bangkok. Can this be applied to all the socio-economic classes, or only in certain aspects? Next is an analysis of the financial growth by socio-economic classes.

Based on Table 14 we may say that there is a transition of social structure by the different classes from the 1990s to 2015. The people who work in primary industries are continuously dropping, and the number of those who are in secondary industry has dropped after the 2000s. Instead, the numbers of skilled white collars and people in Tertiary industry (classified here as “White collar”) have increased.

Another characteristic of Bangkok is that income gap between “blue collars” and “white collars” is getting smaller. Figure 36 shows a comparison of the income levels of the socio-economic classes in Bangkok (income level of “general workers”=1).The indicator of “Upper-white collar” (Professional, Tech [28] and administrative workers) [29] significantly dropped down to “Lower-white collar”. (Clerical, sales and service workers) While “Blue workers” (General workers) increased slightly. This fact indicates that the income gaps among the socio-economic classes are getting slightly smaller over the past year in Bangkok.



Source: my created chart based on data from National statistical office of Thailand

Figure 36 Income gap: each socio-economic class vs. national average

To summarize, the following is the result of economic growth and social changes happening in Bangkok.

1. The First case is the average income has increased rapidly.
2. The Second case is the white collars became the major population of Bangkok.

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[28] Technical

[29] This class only includes employed white collars, not company owners.

3. The third case is the level of income for the blue collars are getting close to lower white collars, and their income is already at the national standard level.

This means that most of the Thai residents in Bangkok are already middle or upper classes regardless of their socio-economic classification.

4.2 Influence of Bangkok's financial advantages on expenses when eating at restaurants

Thai people in Bangkok enjoy high standard of living. How does this influence their consumption activities related to restaurant industry? The direct influence can be seen in a household expenditure survey, by the National Statistical office of Thailand shown in Figure 37.

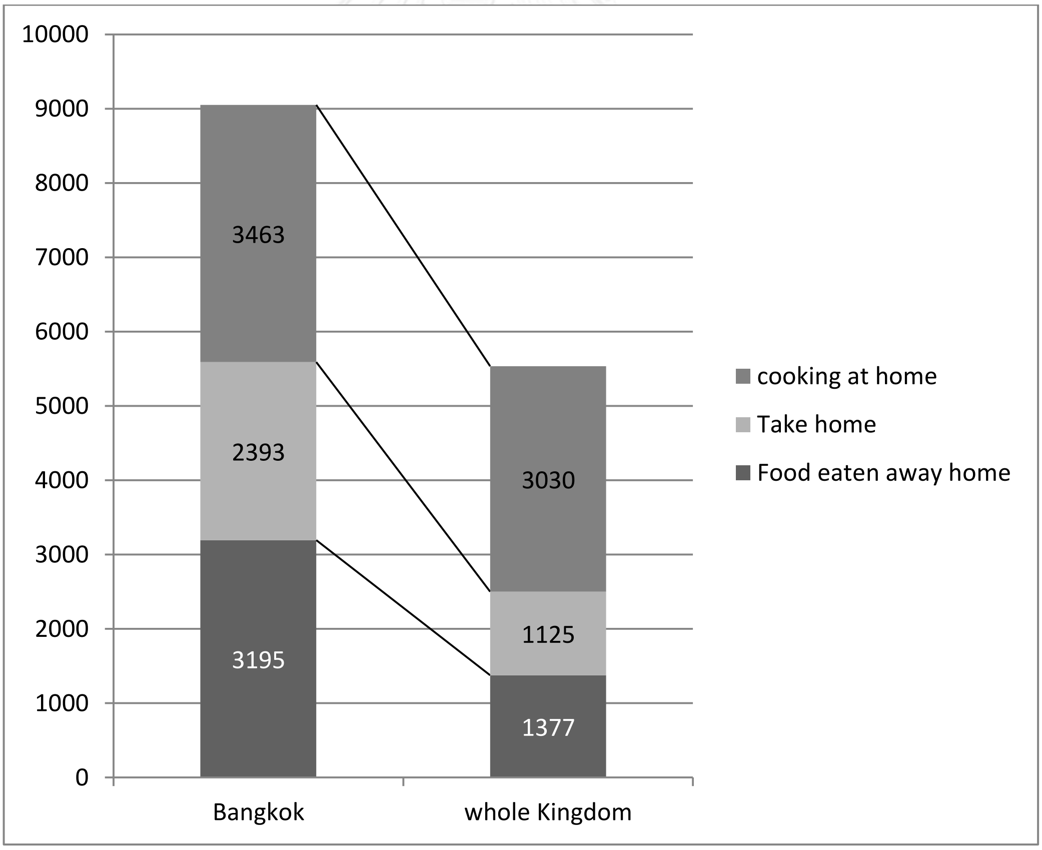


Figure 37 Expenditure on food: Bangkok and whole Kingdom 2013

Source: National Statistical office of Thailand

Figure 37 shows the average monthly expenditure of the household on food, and in categories for Bangkok and the whole country. The figure shows that for cooking at home, taking food away to eat at home ("take away") and eating at restaurants, the total expenditure on food in Bangkok is over 9,000 baht per month, which is 60% more than the national average. However, households in Bangkok spend 3463 baht, which is only 14% larger than the national average of 3,030 baht. When they spend 2,393 baht on "take away" food (+123% of the national average) and spend 3,195 baht (+132% of the national average). This fact indicates that Bangkok people expend most of their advantageous income on readymade meals. This includes "take away" and eating at restaurants. Instead of purchasing more expensive materials and ingredients for for cooking at home, they prefer eating out. The privileged financial situation contributes to the prosperity of restaurant industry in Bangkok.

The next point concerns the analysis of the situation by socio-economic classes. Figure 38, shows monthly household expense on food in categories and by socio-economic classes. Although the upper-white collar class spends the most on food, the ratio of food expense (=Engel's co-efficient) is significantly higher in lower-white collars, which is (27%) and for the blue collars, it is 34%, which is significantly high for the lower income class. The high Engel's score shows that they tend to spend much more money on food compared to the national level. When breaking down the ratio of spending on eating at restaurants, the lower-white collars and blue collars in Bangkok spend about 11-12% of their income, which is double the rate of the national average (5%).

To summarize, the financial advantage gives Bangkokians a chance to enjoy eating out at restaurants. The majority group of Bangkokians spend more money eating at restaurants than other groups of Thai people. This caused the urban circumstances, such as working away from home, accessibility to shopping malls, availability of high quality restaurants, and also 'Thai peoples' passion to pursue eating better quality food. The financial advantages of Bangkok people bring about prosperity on restaurant industries, and it causes Bangkokians to have a positive attitude towards eating at restaurants.

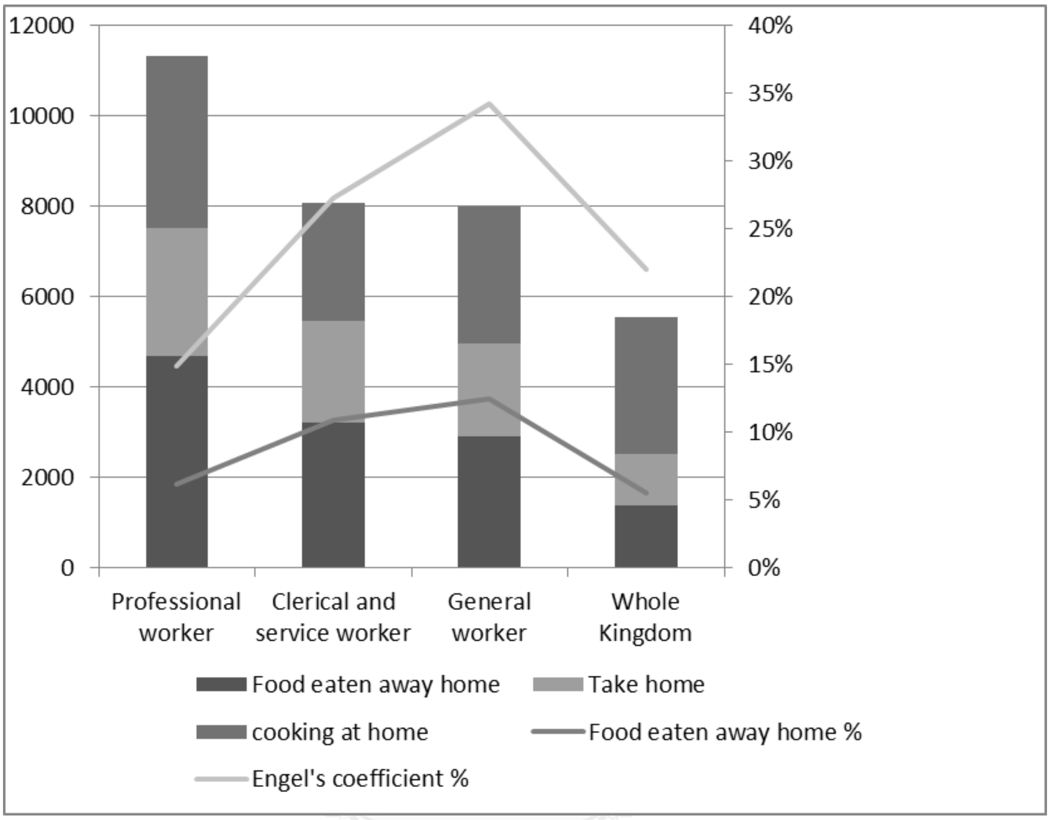


Figure 38 Expenditure on food by socio economic class

Source: The author created chart based on the data of National Statistical office of Thailand

4.3 The expansion of Japanese restaurant industry due to the changes in Thai people’s life styles

So far the economic condition of the Thai people in Bangkok, and their attitude towards eating out contributes to the growth of Japanese food industry. This section shows why Japanese restaurant industries have obtained the most advantaged position in the businesses. The analysis is based on the result of the interviews with a sample of Thai people.

4.3.1 Leading Generations of Japanese Food Boom

To the question “Do you like Japanese food?” 26 out of 32 respondents (81%) answered “yes”, 5 answered “only limited dishes” and only one respondent answered “No”. As it is already shown in 2-5 based on JETRO survey, What is Japanese is liked by the majority of Thai people. Then who are leading this boom?

Table 14 shows the answers to the question “Do you like Japanese food?” arranged by age groups. The number of respondents may be considered to be too small, but the tendency can be seen that the younger age group favors Japanese food.

Table 14 Answers to the question "Do you like Japanese food?" by age groups

Age group	10	20	30	40	50	Total
Yes	2	9	7	5	1	24
Limited		1	1	1	2	5
No					1	1
Total	2	10	8	6	4	30

Below are details of the answers connected to the above table.

“My young relatives all like Japanese food, so when we do voting for restaurants (‘family gathering’) we always end up with Japanese food.” (T.U. a professor, 50s)

“Before I had not eaten Japanese food but I came to like Japanese food because my children bought back Japanese food home from shopping malls”. (T.V. a security guard, 50s)

“My parents like Thai food. That is why I only ate Thai food when I was a child. (Recently he eats out with his parents mostly at Yayoi). These days they like Japanese food especially Teriyaki chicken.” (T.F.an office stuff, 30s)

“My parents did not like Japanese food much. They preferred Chinese. Recently I have taken them to Japanese restaurants, always Fuji nearby. The reason is it is in a neighborhood shopping mall. My parents like grilled salmon, meat and salad." (T.K. a student, 20s)

A pattern can be seen as the senior generations have started to like Japanese food because of their children. Another similar pattern is that parents take their children's to eat at Japanese restaurants. The following answers the question.

"Japanese food has been very familiar to me since I was a child. My family always had reunion in Japanese restaurants." (T.B. an office worker, early 20s)

"I often go to Fuji with my family on weekends. It has been like that since I was a child. My parents like grilled fish/meat and spicy salad in Fuji." (T.L. a student, 10s)

Their opinions and comments suggests that their parents under 40s, take their children to eat Japanese food starting when they are young, and the children have become familiar with Japanese food since their childhood.

Therefore, it can be inferred that the Thai peoples are the most influential customers for Japanese food.

Parents have been accepting Japanese food and their children, a new generation, that has developed a preference for Japanese food since their childhood.

In Table 15 Group 3 are guards and maids, who correspond to "general workers" in the analysis in 4.1. Group 1 and 2 correspond to the upper and lower parts of "professional, technical and administrative workers". Unfortunately, the respondents who belong to the "Clerical and service workers" class are not available. Group 4 is students including high-schools, undergraduate students and graduate students. Based on their family status, most of the respondents in group 4 are assumed to be from families, belonging to Group 1 and 2.

Table 15 Answers to the question "Do you like Japanese food?" by occupation

Occupation	1	2	3	4	Total
yes	7	7	3	7	24
limited	1	2	2		5
No			1		1
Total	8	9	6	7	30

1 Office manager or upper, professor

2 Office worker, shop owner

Guard,

3 maid

4 Student

Group 3 is less interested in Japanese food compared to the other groups. However, during the interviews, because of the language barrier in group 3, they tend to answer "Yes, I can eat." on a simple term. On the other hand, people from the other groups answered "Yes, I love it!"

The reason why the blue class peoples are less enthusiastic in eating Japanese foods is because of financial matter, and the daily living cost of people's lifestyle. Out of 8 respondents, classes 3 - 4 have no holidays, class 2 has only one day off per week. Therefore people from class 3 do not have time to try Japanese food, which is mainly available in shopping malls.

"I do not go to restaurants outside. I work every day without day off."(T.R.30s, Guard leader, who likes Japanese food).

Q. What is your favorite shopping mall? How often do you go to shopping malls?

A1. "No, I work every day including Sunday and Saturday. When I have some free time I am relaxed at home such as reading newspapers." (T.T.30s, guard, who likes only, limited Japanese food.)

A2. “I do not go. I work every day except Saturday, from morning to the evening. On Saturday I have to do household things and taking care of my grandchild, no time to go out.” (T.U.50s, maid, who does not like Japanese)

A3. “Only Sunday is a holiday. Every Sunday I have family party at home.”(T.Q.50s, maid)

Since they have very limited free time, many of them do not have time to go out to shopping malls, where major Japanese restaurants are available.

However, the boom of Japanese food in Bangkok is already influencing them, as well as people in different socio-economic class.

“I eat Japanese food once a month. Whenever I want to eat it and have money. I want to eat more, but Japanese food is too expensive.” (T.I.20s, a maid)

“My wife works in a Japanese restaurant at Sukhumvit soi 11 as a chef assistant. She brings food back home with half price.” (T.R.30s, a guard leader)

What can be seen from these comments is that although some of them do not proactively eat Japanese food, they are put in a circumstance that allows them to access it. For instance, their family work in Japanese restaurants, or there are so many Japanese restaurants in their work place, and these restaurants draw their attention. The younger generation seems to face the boom in the same way as other classes.

To summarize, although the white-collar class is quite proactive in eating Japanese food, the blue collar class is not so proactive. This is because they tend to be conservative and also have less time to go around shopping malls. However, as the boom has spread broadly, the circumstances enable them to reach Japanese food. The younger generation of this class is as proactive as the white-collar class.

4.3.2 Reasons why Thai people like Japanese food

Thai people in Bangkok enjoy new life styles including eating out at restaurants after the year 2000s. As a result, there has been a rapid financial growth rate. Japanese restaurant industry obtains a large benefit from this. The trends are mainly led by the younger generations and white collar classes. The reasons why they choose Japanese restaurants involves their everyday activities and their life styles.

According to JETRO survey in the year 2015, respondents answering the questions, 'why they like Japanese food', say that's because it is "healthy" and "Sophisticated, luxurious" followed by "Tasty" (The set of first answers are in Table 14.)

Table 16 Reasons why the respondents like Japanese

Tasty	37.1 %
Healthy	26.0 %
Sophisticated, luxurious	12.6 %
Fashionable	6.4 %
To like Japan	5.7 %
Safe, Hygiene	4.4 %
Reasonable	2.0 %

. Source: Japan External Trade Organization. (2014a:14)

Compared to the results in other cities, "healthy", "Sophisticated, luxurious" and "Tasty" are the highest rating in Bangkok.

"Made-in-Japan food" is of high quality and high price in terms of color, shape, taste, and packaging; therefore, they seem expect the same on Japanese dishes."(2015) On the other hand, "Familiar" and "Reasonable" are chosen less.

The next analysis is based on my interviews with Thai people. Below are the numbers of respondents who talks about Japanese food. “Tasty” is excluded as most respondents tend to always mention it.

“Healthy”: 6 respondents out of 26 who likes Japanese food (23%)

“Luxurious”: 2 respondents (8%)

“Value for price”: 3 respondents (12%)

“Unique, different”: 5 respondents (19 %)

“Good/fresh/high-quality raw materials”: 6 respondents (23%)

“Familiar”: 3 respondents (12%)

As shown above, 23% of the respondents, mainly aged 40s-50s state that Japanese food is healthy. They think it is “healthy” because of “good, fresh raw materials”. More than half of the respondents considered “Japanese food to be equal to fish, seafood” such as Sashimi, Sushi and Grilled fish. They automatically think fish and seafood are main ingredients of Japanese food, and the ingredients are cooked simply without using much oil, sugar or spices: this is a major impression of Japanese food for Thais, and it matches their definition of “healthy”.

“Japanese food is expensive but worth for money, so I pursue quality which meets the cost. Japanese food is healthy because it mainly uses fresh fish/ seafood. At the same time it is a reason of high cost.” (40s, Senior manager).

Q. What is your image of Japanese food?

A. Clean, fresh, healthy.” (40s, an office director)

Q. Why do you like Japanese food?

A. It is healthy in terms of ingredients and hygienic.” (T.S, 40s, an office director)

Only two Thais think Japanese foods is “luxurious”. More respondents think Japanese food is expensive to some extent, but worth the cost.

"Expensive but worth for that" (40s, an office worker)

"Good decoration" (30s, an office manager).

"Very posh, when the first Hamburger arrived, in Thailand, many Thais went to eat hamburgers because they felt it looks like an expensive dish. Now Japanese food is easily accessible in Bangkok. It uses nice food packaging products for appearances." (30s, an office worker)

"(Japanese food is) affordable" (20s, an office worker)

The majority of the Thai people, regardless of class and age, do not think Japanese foods are too luxurious or expensive. They think Japanese foods are expensive to compare to Thai food; however, the price is worth it due to the cost of good quality, decoration and packaging. The fact that wide price range of Japanese food is now available enables people in each class to choose restaurants that fit their income. Japanese food is not too luxurious for Thai people.

"Uniqueness" is also used to explain the reason why Thai people like Japanese food.

"Interesting and amazing to eat raw fish and delicious" (30s, student)

"Raw material is unique" (20s, student)

"Japanese food tastes different. Good decoration. On weekdays I eat Thai food every day, so I want different taste at weekends." (30s, office manager)

The majority of respondents say they do not like western food, because it is far different taste. When western food was introduced in the past, people tried but it was not popular or liked. Japanese foods has a different effect. One of the reasons why they do not like western food is because it's totally different form the taste of Asia. But Japanese food has some common points such as having rice as the main source of carbohydrate.

"Me or most Asian people do not like eating western food often because it is too oily, salty and we are not used to eating bread or potatoes" (20s, office worker)

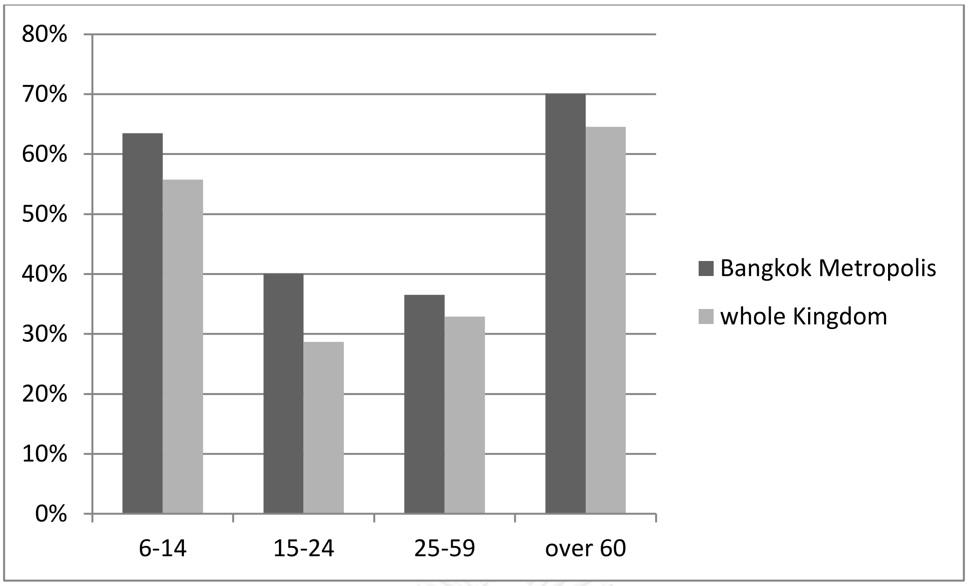
"I used to like American food. But now I like Japanese food. The reason why it was not Japanese in the past is that Japanese food was not known well in the past."(40s, senior manager).

As a conclusion, Japanese food became popular due for three reasons; impression of its being "healthy", "luxurious" but affordable and moderately "unique and different". The impressions of Japanese food fit the demands of Thai people who are pursuing better, one-step further life styles. However, the respondents raised "familiarity" as one of the reasons why they like Japanese which is remarkable. All the clients that mentioned the word "familiarity" were younger generation, between the ages of 10s to 20s. This indicates Japanese food for them is turning out to be standard food rather than special food.

4.3.3 Influence of changing the life styles of Thai people

This section discusses the influence of urbanization spreading Japanese food in Bangkok. *Asai* states people's taste and preference in Bangkok have been changing because their physical constitution has changed due to the spread of air-conditioning. (Asai, 2010)

The percentage of the white collars, who mainly work inside buildings, has been continuously increasing in Bangkok. In the year 2015 : 64% of workers are white collars and blue collars. Thai food was developed in order to fit the hot climate. But now it makes sense that Thai people's taste has changed to fit cooler climates.



Source: Food consumption behaviour survey 2014, National Statistical Office Thailand

Figure 39 Percentage of those who prefer mild food for staple meals by age in 2013

Bangkokians prefer a mild taste, in all generations compared to the national averages. It is the most significant in young generation (15 years to 24 years). On the other hand, the percentage of those who prefer spicy meals is 27% while the national averages is about 34%. In Bangkok, young people's taste has changed. The preference for spicy food, which is the national feature of food preferences, has declined and milder taste is preferred.

"Mild" is translation from a Thai word "c*ʉ̂ʉt*". Originally *cʉ̂ʉt* includes negative feeling when describing Thai food~~s~~. Thai food is normally spicy, sweet and salty. The stronger the taste, the more preferred it will be usually. However, during the investigation, "c*ʉ̂ʉt*"(=mild) is a keyword to describe Japanese food for Thai people it means 'mild' or 'tasteless'. 6 respondents used c*ʉ̂ʉt* during their interview. (The interviews were done mainly in English, but when the people think of the word 'mild in flavor', "tasteless" was there answer when I asked "Does it mean *cʉ̂ʉt*?" in their tongue to confirm it. The word "tasteless" is not a common word to describe food in English.

"There are two kinds of Japanese food. One for Thais and the other is for Japanese (in Sukhumvit). I like only the ones for Thais because the taste is adjusted to Thais. Real Japanese food in Sukhumvit is too tasteless(cʉ̂ʉt)". (30s, office manager)

"Taste is less spicy and cʉ̂ʉt. cʉ̂ʉt means tasteless. When used for Thai food, it has negative meaning but for Japanese it is neutral. Because Japanese food is unique." (20s, student)

Changes in life style has brought about change in taste preferences and it happened most in Bangkok city. In terms of generations, the younger generation prefers a milder taste than the senior generations. Localized Japanese food matches these trends; it is one of the reasons for the spreading of Japanese food in Bangkok.

4.3.4 Advantage of the accessibility of Japanese restaurant chains

Chain restaurants have moderate price range and its accessibility is increasing in shopping malls. Traditionally Thai people put high values on family activities. Weekend dinner with families is a typical and important event for Thais. They tend to spend time in shopping malls.

J.I., who has owned a high-end Japanese restaurant since the early 1990s, comments that while their customers are mostly Japanese people who eat at their company's cost on weekdays, but their customers on weekends are mostly Thai people. "They come with a big family. I see many cases that they celebrate their old grandmother's birthday."

J.H, the owner of the oldest Japanese restaurant in Bangkok, also comments that "on weekends the customers are only upper class or middle class Thai families, who do not order alcohols."

Some families have enjoyed family dinners in Japanese restaurants on weekends since the 1990s. However, at that time it was a privilege for a limited number of people only. As the food in these restaurants cost far too much, also

Japanese food was not popular back then. Japanese food was just another option for them, as Chinese or Thai were mainly chosen.

“On weekends when having dinner with family we used to go to Chinese restaurants. But recently it has become Japanese. Japanese food was not well-known in the past.” (T.A, 40s, senior manager)

Since the middle of the 2000s, there has been an increase in the household income simultaneously with openings of new shopping malls one after another. The most outstanding one seems to be Central World. The Central Group has taken over World Trade Center and opened and renewed Central World in the year 2006. The Central Group accelerated launching or renewing shopping complexes. Visiting these shopping complexes is a typical way of spending their weekends, with family or friends, while eating lunch or dinner at restaurants in shopping malls. T.A. comments that she goes to dinner with her families, including teenage nephews and nieces every weekend. Normally, her family would choose Thai or Japanese. Other respondents also talked about their dinner with families. T.C, an office manager in her 30s takes her ‘old’ parents to Fuji restaurant in the shopping mall nearby three times a month. T.F, an office staff in his 30s meets his parents, always at a Japanese restaurant in some convenient shopping malls.

The reason why they choose the Japanese restaurants for their family dinner is because there are not many chain foreign restaurants with moderate budget range in shopping malls.

T.K., a student in her 20s says she and her family always have reunions at a Japanese restaurants because “good and affordable restaurants like Fuji are not available among Chinese restaurants.” although her family loves to eat Chinese food as well as Japanese food.

Table 18 shows the numbers of big chain restaurants, with standard price range in the 14 malls introduced in 2.3.

Table 17 Number of famous chain restaurants in 14 malls

Japanese	FUJI	10
	YAYOI	6
	Ootoya	4
	Hachiban	10
	Zen	7
	Oishi group	10
	Coco Ichibanya	5
Western	KFC	8
	Mcdonalds'	7
	Pizza company	7
	Sizzlar	6
Chinese	Seefah	3
Korean	Dak Galbi	2
	Bon Chon	3
	Sukishi	4

Source: my field research in May –July 2015

The table shows that Western restaurants follow Japanese restaurants in number. However, the majority are fast food restaurants except Pizza Company and Sizzler. Burger King, Subway, and so on also have shops but these are fast food restaurants. These fast food restaurants cannot be their main choice for family reunions, because they are "supposed to be only for young students and low class people (comment by T.B., an office worker in her 20s)"older generations do not like fast food restaurants.

Chinese restaurant chains are not seen so often; only Seefah and a few others exist. The shops are not large as Japanese or Western ones. However, the Korean chain restaurants are seen very often and relatively busy.

The accessibility to Japanese restaurant chains fit the many life styles of middle class Thais.

4.3.5 Influence of Tourism on Japanese food industry

A rapid increase in the number of tourists from Thailand to Japan is taken into account, as a factor of Thais' increasing passion for Japanese food. The number of tourists in Japan has dropped after the earthquake in the year 2011, but after that it has been increasing rapidly. The number of Thai tourists going to Japan has increased from 26,000 in the 2012 to 65,800 in 2014.

The international travelers have also been increasing according to Figure 40. The Japan National Tourism Organization (JNTO) claimed that the reasons for the increase of Thai tourists in Japan are the removal of tourist visa for Thai nationalities and the lowering of air tickets from Thailand to Japan.

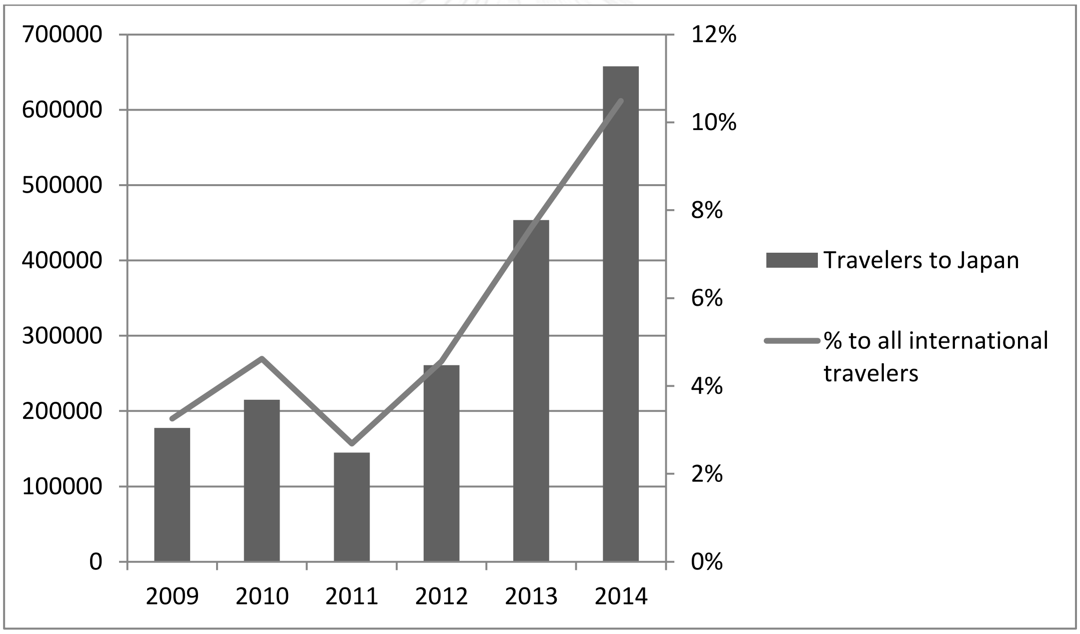


Figure 40 Booming tourism to Japan

Source: The author created this chart based on data from Japan National Tourism Organization (JNTO)[30]

It's hard to find evidences causing the boom of tourism in Japan. We are unsure if it relates directly to Japanese restaurant industries in Bangkok. However,

[30] Retrieved from http://www.jnto.go.jp/jpn/statistics/since2003_tourists.pdf

there are two points that can be discussed. First, those who visit Japan are satisfied with the tastes of Japanese food in Japan, and like to try more Japanese food after being away from home. Second, TV programs concerning Japanese food help promote Thais' trips to Japan.

Kakumoto (2011) found that 60.8% of Thai tourists expect to enjoy Japanese food before visiting Japan, and 75% of Thai tourists are satisfied with Japanese food after visiting the country. It means that once Thai people visit Japan, they are satisfied with the original Japanese food. For example, *Honmono Sushi*, was opened targeting wealthy Thai people, who have visited Japan many times. When a customer visited Japan, he was satisfied with the food in Japan. When he came back to Thailand he might demand more for high quality Japanese food. This could trigger improvements of the Japanese restaurant industry in Thailand.

In addition, several Thai respondents mentioned that they had watched TV programs which introduced Japan, such as *"Say-hi"*; *"Iron-pan cooks*." these programs mainly concern Japanese food. Respondent T.P., an office worker in her 30s likes to watch "*Say-hi*", and it makes her want to visit Japan or eat Japanese food. Respondent T.G., a student in his 30s says "after visa is not required for Thais to Japan, I see a lot of travel programs every day. I try interesting food from those in Fuji."

To conclude, the booming tourism in Japan is a factor affecting Japanese restaurant industry in Bangkok.

4.3.6. Popularity of Japanese food as a result of Japanization of young Thais' culture

The fact that Japanese food has become popular among young generations of Thais can be considered as a result of popularity of general Japanese culture among them. The rapidly increasing number of Thai tourists to Japan is very likely to bring about the increase in the influence of Japanese culture on Thai society. The more they visit Japan, the more influence they receive from Japanese culture. Apart from food, there are other traits, such as language, comics, music, fashion, and so on.

Indeed, Bangkok is full of products from Japanese culture. We can easily see Japanese cartoons or animations, such as Doraemon, Rirakkuma, Shin-chan, and so on anywhere of the city. J-POPs and Japanese dramas can be seen in Thai domestic TV channels. Respondent T.K said she has been very familiar with Japan because she was brought up with Japanese cartoons and animations. Seeing Japanese people's eating styles through these media should give them ideas of Japanese food without awareness, so that they feel familiar with them when they see Japanese food.

Scholars use the term "Japanization" to describe such cultural and social influence of Japan in addition to economical influence. Suzuki (2008) describes that Japanization process was likely to emerge from the expansion of Japan's economy, and it was possible that Japanese culture has also started to increasingly defuse into Thai society at the same time. He gave examples of products of Japanese cultures as follows.

- Japanese cartoons
- Translated Japanese literature
- Japanese dramas
- Japanese fashion
- Japanese language
- Japanese food and green tea

Among these factors, Suzuki considers Japanese food and green tea as a factor of contributing to a more craze for Japanese culture not only among young Thais but for wider generation. In Thailand, green tea signifies 'Japanese-ness', a healthy drink.

Toyoshima (2008) conducted quantitative research by using questionnaires among secondary school students in Thailand to examine Japanese cultural products in Thailand ethnographically. He focuses on several factors which are expected to stimulate preference for Japanese cultural products: J-fashion, J-Food, Manga and Animation, J-Music and J-TV Programs. He found out there is strong correlation between J-fashion and J-food, and also between manga, animation, TV programs and music among Thai youth.

To summarize, the popularity of Japanese food can be a part of "Japanization" in Thailand, and is likely to co-occur with other Japanese cultural products. But one significant characteristic of Japanese food is that it is accepted by wider generations, not by young generation only.

CHAPTER 5
Conclusions

5.1 Summary

As stated in Chapter 1, before I conducted this research, I had observed that Japanese restaurant industry in Bangkok had been expanding and booming outstandingly in the previous decade. Therefore, I wanted to investigate this phenomenon.

The purpose of my study is to examine the causes of the growth of Japanese restaurant industry in Bangkok from sociological perspectives. I focus on the influence of Japanese communities and Thai society on the growth. The hypotheses are: Japanese restaurant industry has been expanding in two different ways: the first is that there has been change in the numbers and characteristics of the Japanese restaurants targeting Thai people, and those targeting Japanese residents in Bangkok. The second is that the Japanese restaurant industry in Bangkok is influenced by sociological and financial changes among both communities.

The data used for analysis came from two sources. The first is my own field research, in which I interviewed Thai people and Japanese residents in Bangkok. The second source is from free magazines, websites, and official documents of Japan and Thailand.

In Chapter 2, I examined the current overall situation of Japanese restaurant industries, from various perspectives. The results show that the number of Japanese restaurants in Thailand has increased by 20% since 2007. Approximately 70 % of them are located in Bangkok. The speed of the expansion is significantly higher than the entire restaurant industry. The expansion is not only in numbers but also in varieties. The majority of the Japanese restaurants in Bangkok serve varieties of specialized dishes, in order to make them distinguished from others. It is also proven that the majority of Thai people favor Japanese food, which they describe as "healthy" and "sophisticated".

The Four big Japanese restaurant chains, Fuji, Oishi Group, Hachiban and Zen have approximately 20 years of history, and significantly influence Japanese restaurant industries. Since the middle of the 2000s, new chains have been emerging; e.g., Ootoya. This triggered current Japanese food boom among the people in Bangkok. As a result, there are many kinds of chains available in Bangkok from authentic to localized, from comprehensive to specialized, from luxurious to reasonable, and from traditional to fusion food.

From my field survey of shopping malls, different trends can be concluded. First, the highest percentage of Japanese restaurants has rich varieties, and is seen at shopping malls in residential areas. This indicates that Japanese food is a major option when Thai people go out to eat at weekends. The four big chains contribute to these trends. The localized Japanese restaurants and "take away" are broadly seen in hypermarkets in residential areas. Japanese food has been highly accepted by Bangkokians. In Mahboonkrong Center, a popular mall for young people, there are new types of Japanese restaurants, while super-luxurious shopping centers offer "authentic" Japanese restaurants to rich Thai peoples.

I also compared Japanese restaurants for Japanese residents and those for Thai peoples in order to find out if they were integrated to each other. The result is that the Japanese restaurants for Japanese and Thai people are clearly separated from each other because Japanese people prefer authentic taste, but the majority of Thai people prefer localized taste. However, a new type of Japanese restaurant has emerged; e.g. super high-end authentic restaurants, aiming mainly at Thai higher class customers. Nevertheless, more and more Japanese chains have arrived from Japan, and are successful in attracting both Thai and Japanese customers. Individual authentic restaurants start to take Thai customers in order to survive in the severe competition.

In Chapter 3, I examined the influence of the expansion and diversification of the Japanese community in Bangkok on the growth of Japanese restaurant industry. The economic crisis in the late 1990s is one of the turning points. Before it, there were not much variety of restaurants for Japanese in Bangkok to choose from; the majority was high-end authentic Japanese restaurants that Japanese expatriates use for '*Settai'.* But due to the financial crisis in the late 1990's, these authentic restaurants closed down, because *Settai* or privileged expatriates decreased. Instead, to meet the demands from new kinds of residents, such as local hired staff members, young expatriates, hired females or retired people, more casual restaurants for daily eating flourished. As a result, when Ootoya arrived in the middle of the 2000s, they established a good basis of Japanese restaurant industry in Bangkok. Due to the long history of authentic Japanese restaurants for '*Settai',* it is also a feature that skilled Thai chefs of Japanese food are seen a lot, and some of them are starting to run their own business. On the side of Japanese residents, there are also changes. Since more Japanese residents are open to Thai communities, they do not hesitate to live and eat outside Japanese area. These features have brought about the uniqueness to Japanese restaurant industry in Bangkok.

In Chapter 4, I examined the industry from the perspective of Thai communities. The analysis is mainly based on my interview data. First, I show facts about the financial condition of Thai people, which contributes to Japanese food spreading among Thai people, starting in the middle of the 2000s. After the economic growth, the Thai people especially the Bangkokians have more income in all the classes, and they tend to spend higher amount of money on food, eating out and "takeaways". I also explain why they choose Japanese food which has become their new habit. First, it was discovered that many of the white collars, and the younger generations were leaders of the change that influences the boom. The reasons why they choose Japanese food are that Japanese food is "healthy", appropriately "luxurious" and affordable. It is also "unique and different" but not different as much as western food. These characteristics of Japanese food fit the demands of Thai people, who are pursuing better lives in the middle of financial growth. Secondly, the new life styles of the majority of the people living and working inside air-conditioned buildings, must have caused them to prefer food of milder taste. The mild taste of Japanese food matches this new preference. Another advantage of Japanese food is accessibility. Japanese chain restaurants with standardized quality and reasonable budget range; are now major options in shopping malls. It's a popular place for urban middle class Thai people~~s,~~ to spend their weekend or free time\ Lastly, booming tourism in Japan can be considered to be another factor which affects the Japanese restaurant industry. Thai people who visit Japan tend to have positive impression on Japanese food there. When they are back in Thailand, they may contribute to higher demand of good quality Japanese food. Also, TV programs promoting Japanese food could also have influenced Thai people who cannot afford to visit Japan. In another perspective, the popularity of Japanese food can be considered to be a part of Japanization In Thailand. Japanese cultural products are widely accepted, creating "Japanese-ness" among Thai people, and it is likely to highly influence Japanese food industry in Thailand, particularly Bangkok.

5.2 Discussions

I have discussed the Japanese restaurant industry from the early days to the current booming situation; and influences of changing societies of both Japanese and Thai peoples. At last, it comes to the discussion part. I wonder if the Japanese restaurant industry, will shrink and will be recalled as a past boom or it will continue to expand wider and wider in the future.

I would like to conclude that Japanese restaurants will maintain a certain position as the second largest food industry following the Thai food, and it is already coming to the next stage from just "boom". The key is the fact that Japanese food has turned to be one option of usual meals, instead of meals for special occasions among younger generations. As stated in chapter 4, some of the young Thai interviewees aged 10-20 gave a reason why they liked Japanese food, that it was familiar, while senior respondents gave a comment that Japanese food was exotic and that they wanted to keep it for only special occasions regardless of their passion level on Japanese food.

For example, respondent T.L., a student in his 10s, says his favourite foreign food is Italian and he loves to eat Pizza with his friends. However, when I asked if he liked Japanese food, he answered yes and raised several kinds of Japanese dishes he liked, such as curry, Omurice and ramen. He eats Japanese food more frequently than Italian or other western food. He said he ate at Japanese restaurants mainly by himself. His parents often took him to eat at Japanese restaurants like Fuji, as well as Thai restaurants. For him Italian or western food was special food, because his parents did not take him to Italian or western restaurants when he wanted. On the other hand, Japanese food was familiar food which he chose to eat in everyday life without "special" feeling.

Another case is respondent T.K., a student in her early 20s. She says she likes Japanese food because she has often eaten it since childhood. She eats out with her family, and they always go to Japanese restaurants, such as Fuji. She sometimes eats at Ootoya or Fuji by herself but not too often due to limited budget. She says she does not like spicy food. She also mentions an influence of Japanese cartoons on her feeling of familiarity to Japanese things.

Stories from these young respondents indicate that at least a number of the younger generations, under or fewer than 20s do not consider Japanese food as special, but can be one of the daily choices for everyday meal with no special meaning. The same phenomenon happens to children of some senior respondents. Respondent T.S., a company director says her 15 year old son eats Tuna-don (Tuna on rice) after school four times a week. Respondent T.V., a guard in his 50s says his sons of 10 years and 15 years old go to eat Japanese food at shopping malls very often.

Table 18 Frequently eaten Japanese foods by age group (number of persons)

Age group	More than 4/month	2-4/month	1/month	4/year	less	never
10	1	1				
20	4	1	3	1	1	
30	2	3		2	1	
40	1	2		2	1	
50	1			1		2

Source: Interview data

As shown in Table 19, the Thai younger generations eat Japanese food more frequently. Nearly half of the respondents in 10s to 20s eat Japanese food more than once a week.

Not only the frequency, but also the varieties of the dishes they eat. Respondents in their 30s or 40s mainly like Sashimi/Sushi, Grilled fish or chicken and noodles, the younger generations tend to like everyday Japanese food, such as ramen, curry or Okonomiyaki as well as Sashimi/Sushi. Japanese food would be considered as an option for the current young generation's usual meals instead of food for special occasions.

5.3 Recommendations

Existing studies are mainly written from business points of view and also from Japanese persons' perspectives. Therefore, the significance of this thesis is that I gained more insight into Thai people's lives and societies. However, the interview in my field research was based on a small number of samples. This is because of the limitation of resources and social networks that I had for this research.

Therefore, I expect future studies will be done on both Thai society and Japanese community with organizational support. There should be studies on

Japanese culture in Thailand as well as business marketing studies in a different perspective.

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APPENDIX

List of interviewees

1. Thai interviewees

Abbreviations	Date of interview	occupation	age range	sex
T.L	20-Jul	Chula student	10	M
T.Y	July	High school student	10	M
T.B	01-Jun	Researcher, Japanese company	20	F
T.D	17-Jun	MA Student	20	M
T.E	18-Jun	MA Student	20	M
T.I	10-Jul	Office maid	20	F
T.K	17-Jul	Chula student	20	F
T.M	24-Jul	Office worker	20	M
T.O	25-Jul	Undergraduate student	20	M
T.R	28-Jul	Office worker	20	F
T.S	28-Jul	Office worker	20	F
T.P*	03-Aug	home maid	20	F
T.X	July	Coffee shop owner	20	M
T.C	08-Jun	Admin manager, Japanese company	30	F
T.F	20-Jun	Office staff	30	M
T.P	28-Jul	Office worker	30	F
T.Q	28-Jul	Office worker	30	F
T.T	28-Jul	Office manager	30	F
T.O*	03-Aug	Office maid	30	F
T.R	03-Aug	Guard supervisor	30	M
T.T	10-Aug	Guard	30	M
T.A	25-May	senior manager, western company	40	F
T.G	20-Jun	PhD Student, Part time	40	M
T.H	10-Jul	Accountant	40	F
T.J	10-Jul	office manager	40	F
T.N	24-Jul	Office worker	40	M
T.AA	30-Sep	Office General Manager	40	F
T.U	29-Jul	Professor	50	F
T.Q	03-Aug	office maid	50	F
T.S	04-Aug	Office director	50	F
T.U	10-Aug	Office maid	50	F
T.V	10-Aug	Guard	50	M

*T.P and T.O turned to be non-Thai, so not included in the statistics in this thesis.

2. Japanese interviewees

Abbreviations	Date of interview	Occupation	Sex
J.A	05-Mar	An Editor of a Free Magazine	M
J.B	10-Mar	An owner of a Japanese job agent since early 1990s.	M
J.C	05-Jun	The chief editor of *Hello Thailand*	M
J.D	12-Jun	An sales assistant of a Japanese free magazine	F
J.E	14-Jul	An chef in a Japanse restaurant owned by a Thai	M
J.F	25-Jul	An Japanese resident who have lived in Bangkok since 1990	M
J.G	01-Aug	An Japanese restaurant owner in Silom area	M
J.H	01-Aug	The owner of the oldest Japanese restaurant in Bangkok, Hanaya	M
J.I	04-Aug	The owner of a high-end Japanese restaurant	F
J.J	06-Aug	The owner of a high-end Japanese restaurant	M
J.K	08-Aug	An store manger of a Japanese restaurant	M
J.L	12-Oct	An Japanese job agent	F

VITA

Mizue Miyamoto was born in Japan in 1977. She graduated from the University of Tokyo (Tokyo, Japan) with a B.A. in Sociology of Education in 2000. She stayed in Thailand from 2005 to 2008 and 2012 to 2015, joined the Southeast Asian Program at Chulalongkorn University in 2013.

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