

NAVIGATING AI AND CONVERGENT COMMERCE


Trends Shaping
Thai Retail

Our Purpose Is Key

Deliver reliable information for a true understanding of Society, Markets and People to help the world make better decisions



#1 The most innovative insights & analytics company in the world

 Greenbook 2023-2024-2025 TOP 50 GRIT Report

IPSOS – A WORLDWIDE LEADER IN MARKET AND SOCIAL RESEARCH



20 000
Employees



Across 220 cities and
90 markets



For **5000+** clients



With **6M+** authenticated,
proprietary panelists

Thai consumers are navigating genuine complexity.

83%

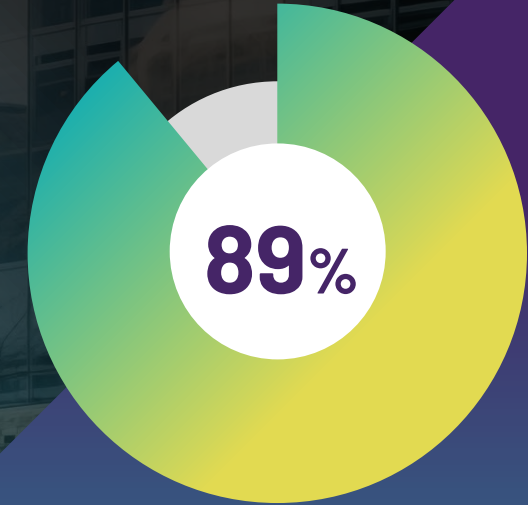
Say the world is changing too fast

72%

feel overwhelmed by too many choices in life



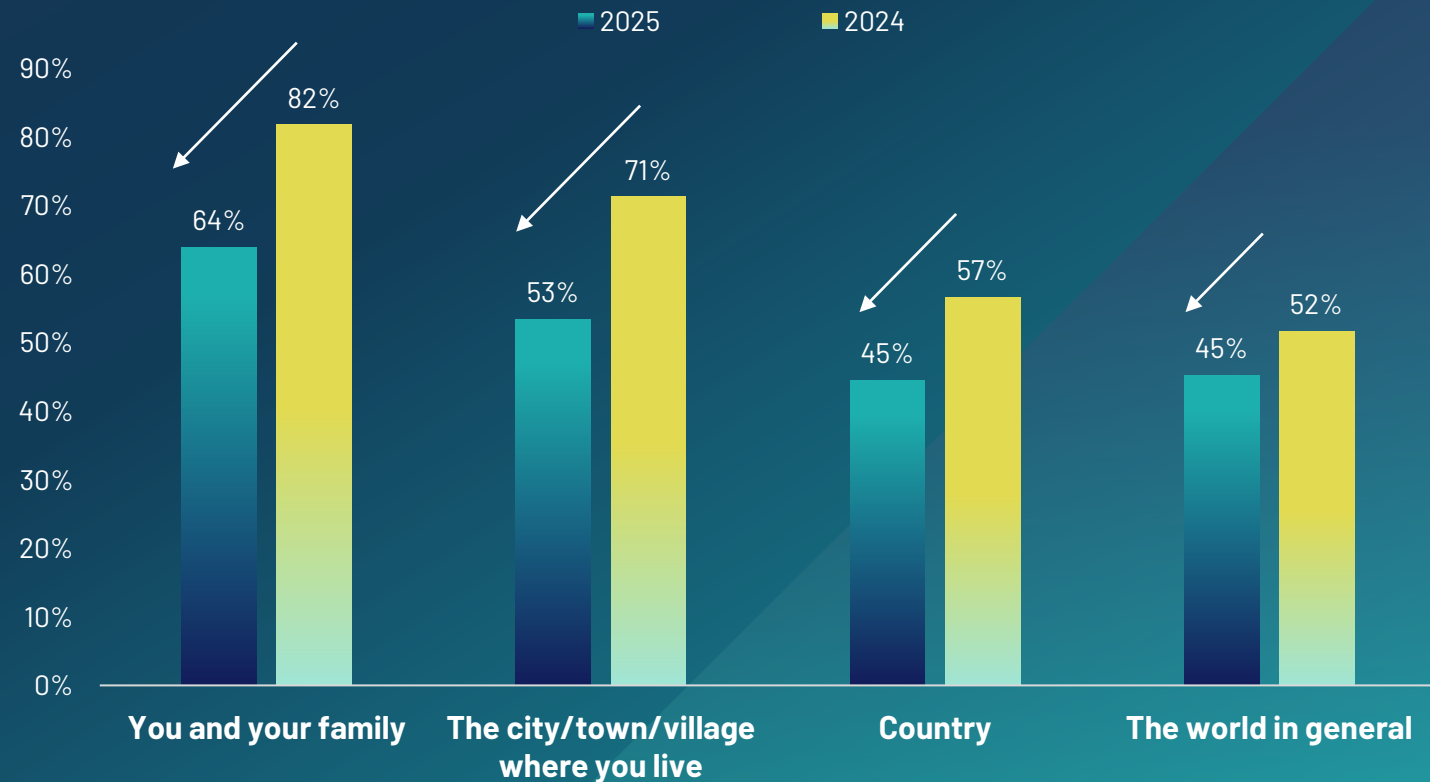
"I live for today because the future is uncertain"
(global average 66%)



"It's important that I save today because the future is uncertain"
(global average 83%)

Optimism is declining across all levels – a signal that consumer confidence is fragile, and that retail experiences must work harder to earn loyalty.

Q: Looking ahead to the next 12 months, are you optimistic or pessimistic about the following? It doesn't matter if you're not sure; we are interested in how optimistic or pessimistic you are feeling about each. (% optimistic)



Source: Ipsos Global Trends 2025, Thailand, Ages 20-74, n=500

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In this climate of Polycrisis, how do you design retail experiences – powered by AI and connected commerce – that feel human, relevant, and worth returning to?



Source: Ipsos AI Monitor 2025, Thailand, Ages 20-74, n=500

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Thailand punches far above the global average on AI optimism

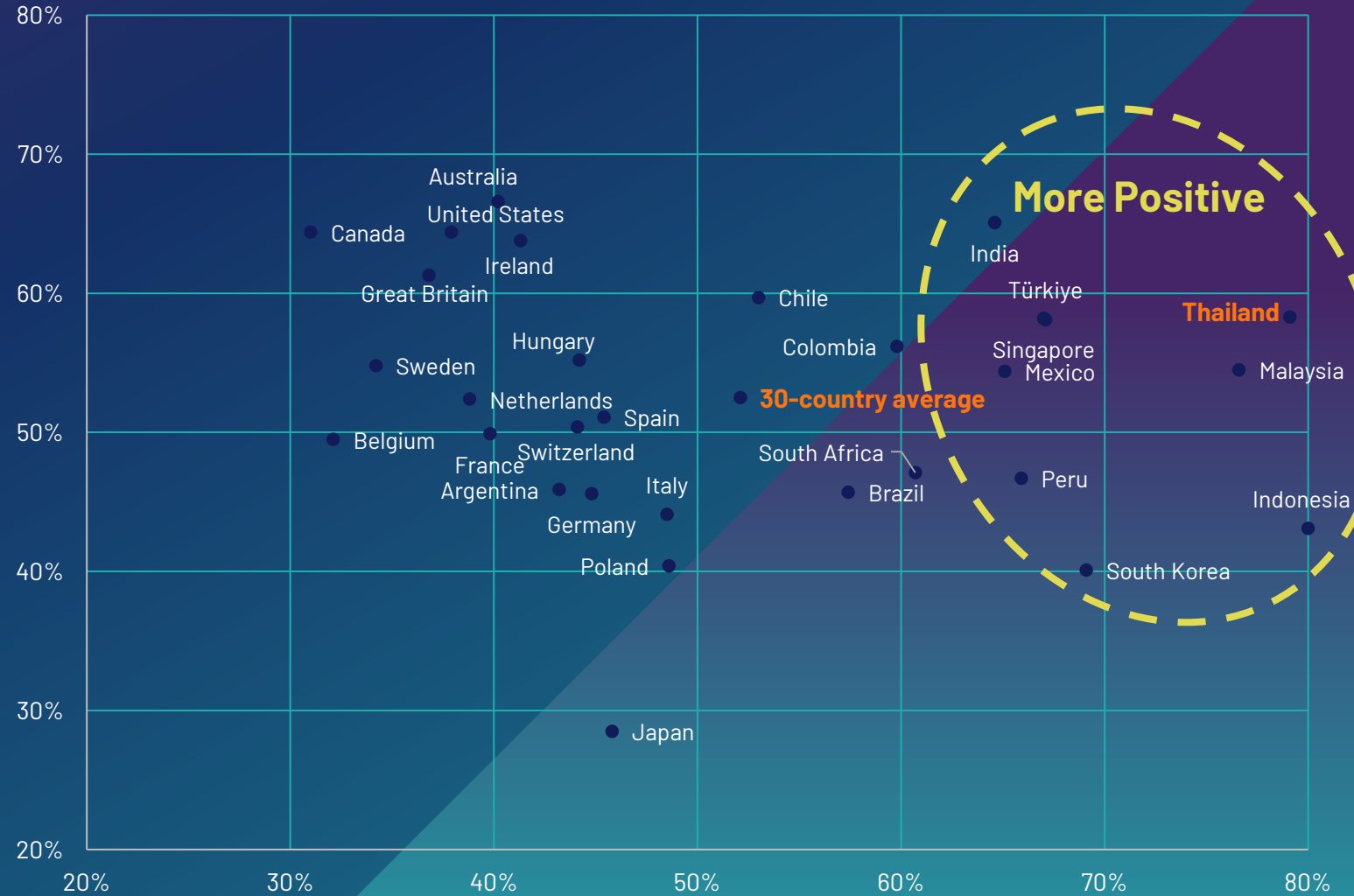
78%

of Thais believe AI-powered products and services have more benefits than drawbacks

69%

believe AI will save them time to get things done

% Products and services using AI make me **anxious**



% Products and services using AI make me **excited**

Source: Ipsos AI Monitor 2025, Thailand, Ages 20-74, n=500

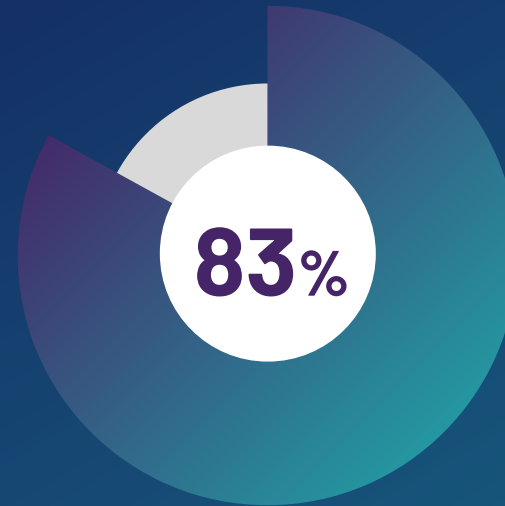


Transparency is non-negotiable

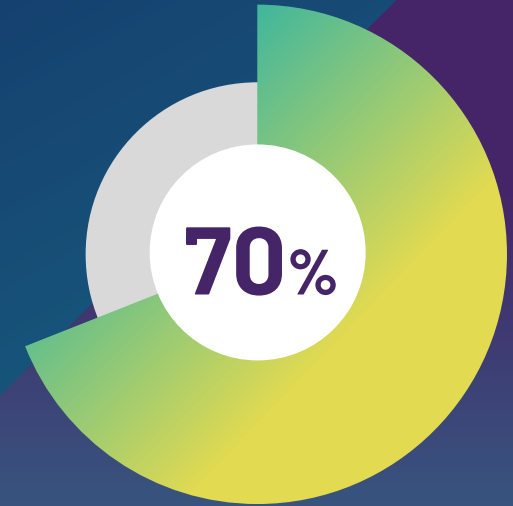
Privacy concerns exist, but AI convenience is too valuable to ignore.

Disclose **clearly**.

Deliver **consistently**.



of Thais believe companies should disclose their use of AI (global average 79%)



trust companies using AI to keep their data safe (global average 48%)

Commerce has been evolving rapidly.

From Multichannel to Convergent Commerce



Thailand has one of Southeast Asia's highest social commerce adoption rates
LINE, TikTok Shop, and Live commerce are mainstream, not emerging
Mobile payment penetration makes frictionless checkout table stakes

Experience is now the primary battleground **You are competing on whether you deliver what you promise, every time.**



73%

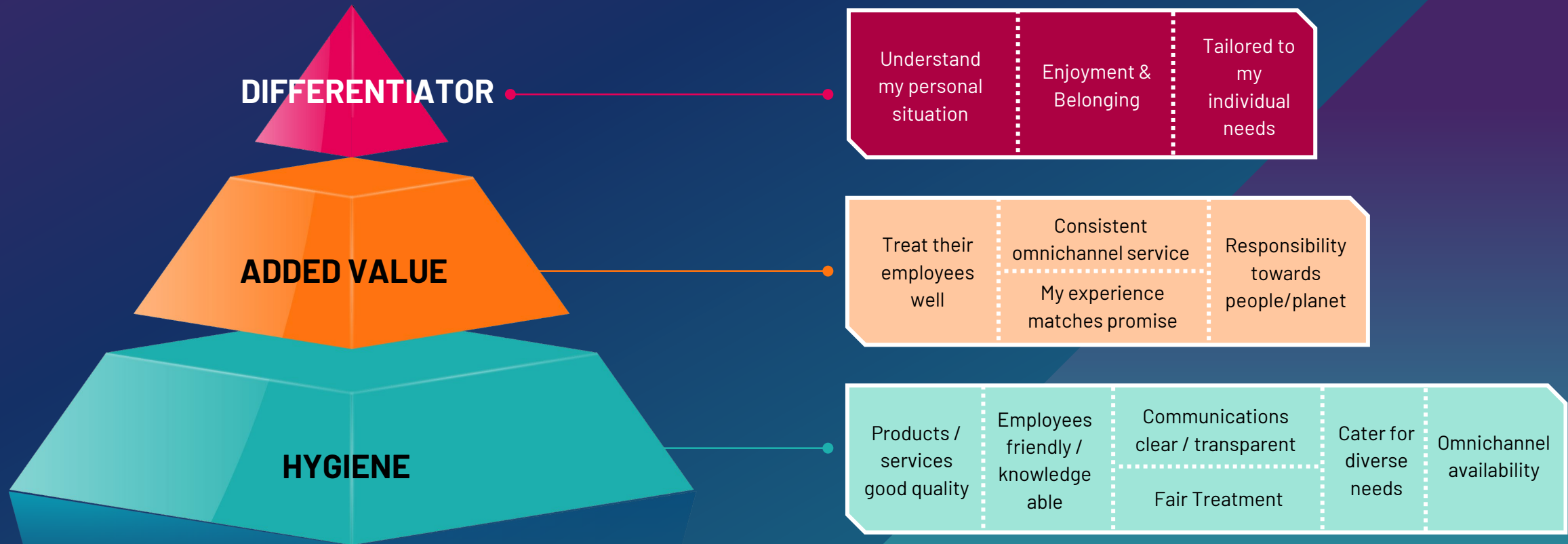
of Thais choose a brand because they expect the experience to be good.
But 55% say the reality falls short of the promise.



42%

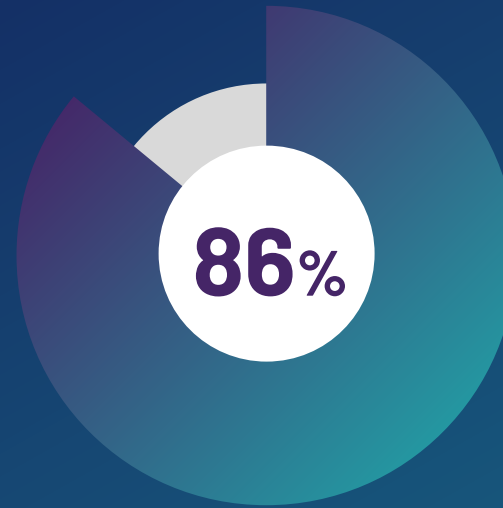
will **BUY LESS or stop buying** after poor experience

WHAT ARE THE BUILDING BLOCKS OF SUCCESS?

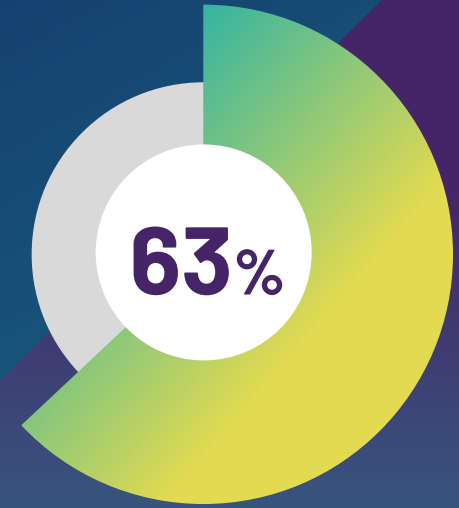


A great experience doesn't just retain – it recruits. In Thailand, word of mouth is a growth engine

Personalisation at scale is not a nice-to-have – it directly drives acquisition, not just retention



of Thais say that **recommendation** influenced their decision to start using a brand compared to only 56% globally



Thai Gen Zs trust on product/brand **recommendation made by influencers** more than they trust what brands say about themselves.



HI HUMAN INTELLIGENCE

Imagination | Creativity | Curiosity

- Go beyond the obvious
- Read the unspoken
- Build empathy with customers
- Make the business decisions

+

AI ARTIFICIAL INTELLIGENCE

Efficiency | Inspiration | Scale

- Create new hypotheses
- Personalise at scale
- Reduce decision fatigue
- Quickly tap into vast data

Move from Image to Impact

Thai consumers are skeptical of greenwashing. They want direct, tangible impact on their lives – not brand positioning.

Circular commerce

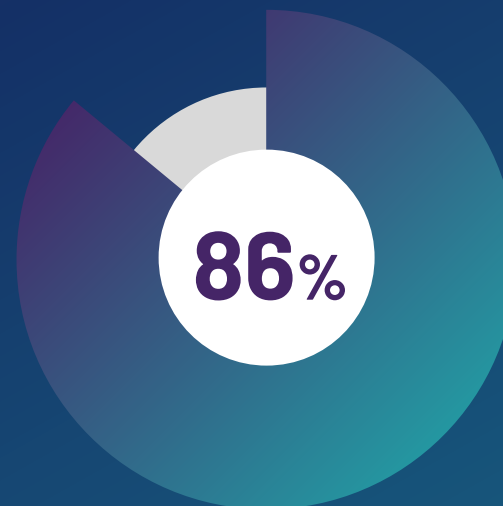
Rental, resale, subscription models that reduce cost AND waste

Transparent sourcing

Show the supply chain – Thai consumers want to know and trust

Value + values

Consumers want deals that are also responsible – design for both



believe businesses have a duty to **contribute to society**, not just make profit



want brands to make it easier to **make a positive difference** in the world

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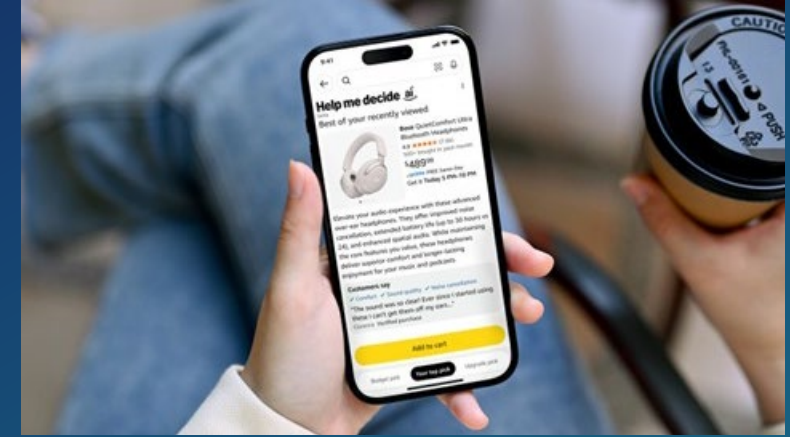
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Gore-Tex Germany's new **€25/month rental service** for kids aged 5–12 promotes a circular economy by allowing seasonal jacket swaps and providing full damage coverage, removing the hassle of buying and reselling outgrown gear.



From physical to phygital:

The line between e-commerce and physical retail is dissolving. In 2026, expect deeper integration of: QR-led in-store discovery, AR product try-on.

Pop up shops:

Pop-up retail is becoming one of the most dynamic, tech-infused channels in the retail ecosystem. **Smart vending machines and mobile kiosks** will be at the heart of retail transformation, enabling D2C and legacy brands to deliver personalized, always-on experiences to customers.

Help Me Decide:

Brands can leverage the high excitement and trust in AI by focusing on tangible, convenient utility.

Imperatives for Retail in Thailand

Design for the ecosystem, not the channel.

Map where Thai shoppers actually live. Build for social commerce, livestream, and in-store digital with equal fluency. Convergent commerce is not a strategy – it is the new baseline.

Close the promise gap before opening new ones.

Fix your CX foundation – Certainty, Fair Treatment, Control – before investing in differentiators. Reliability and transparency outperform novelty in a market where over half of experiences fall short.

Imperatives for Retail in Thailand



Lead with technology. Guide with humanity.

The synergy of HI + AI is redefining physical retail, transforming stores from simple transaction points into immersive, tech-driven experiences. By integrating AI-driven personalization and real-time operational data, tactile and human-led exploration becomes essential. Retailers are creating a seamless omnichannel journey, moving to convergent commerce. This strategic evolution ensures that brick-and-mortar remains a vital, highly efficient component of the modern commerce ecosystem.

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Beyond omnichannel to Convergent Commerce

