GLOBAL TRENDS

THE SEARCH FOR SILVER LININGS

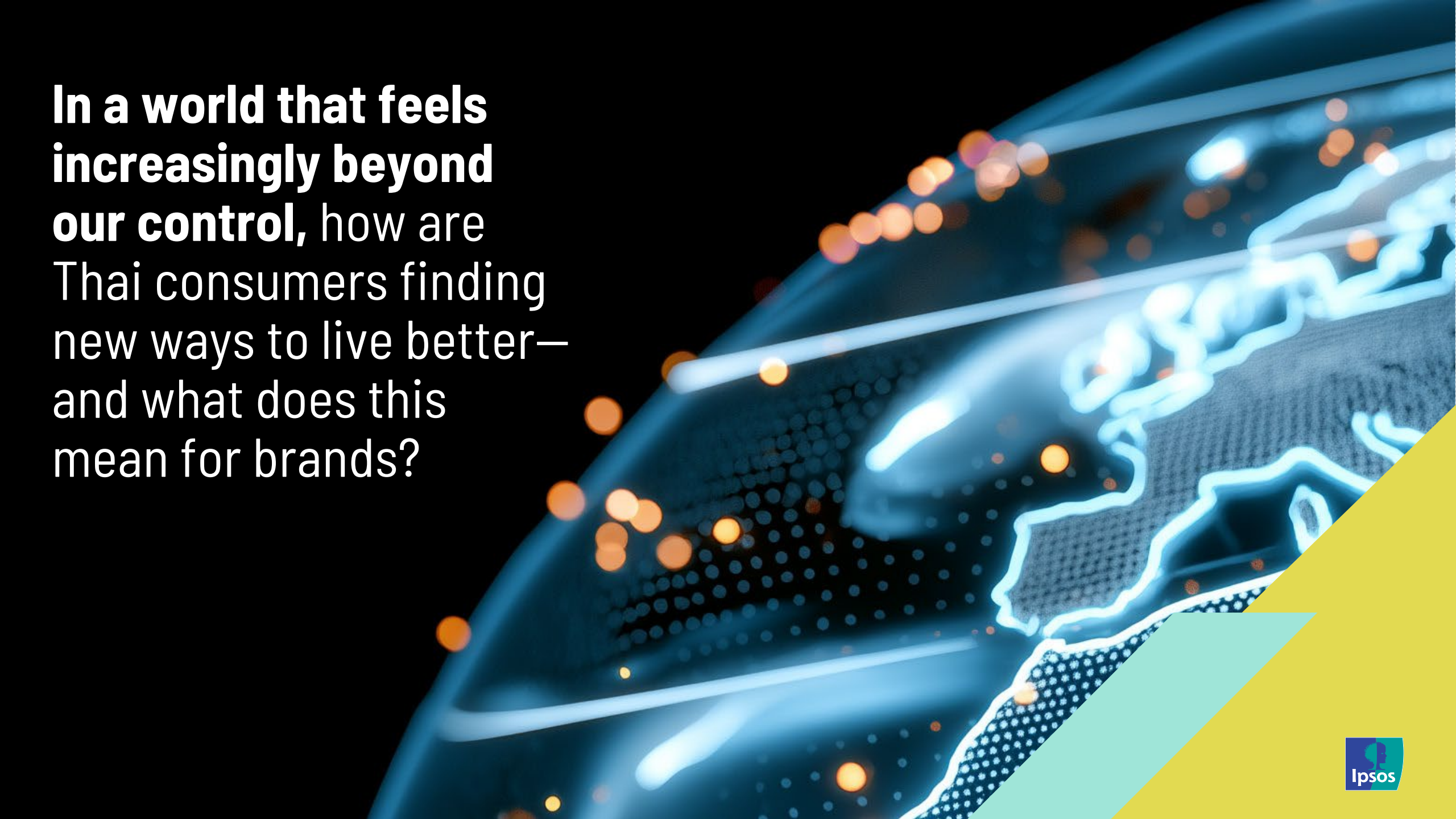
Living Better in Uncertainty

Thailand Edition

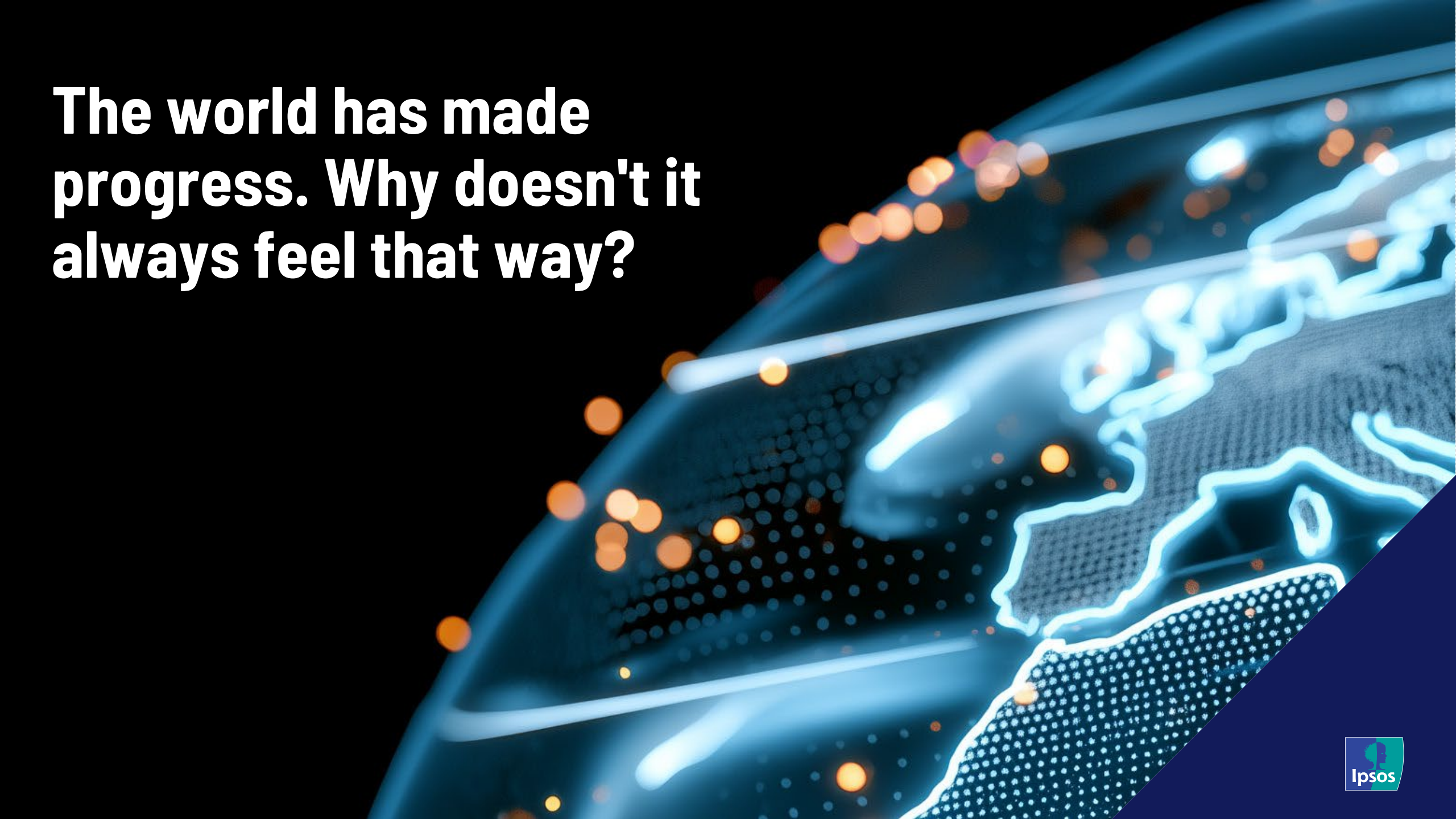


Ipsos

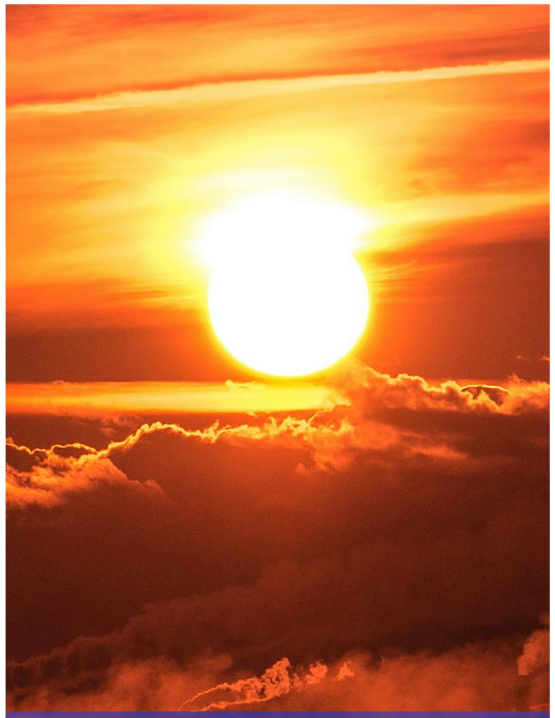
In a world that feels increasingly beyond our control, how are Thai consumers finding new ways to live better—and what does this mean for brands?



The world has made progress. Why doesn't it always feel that way?

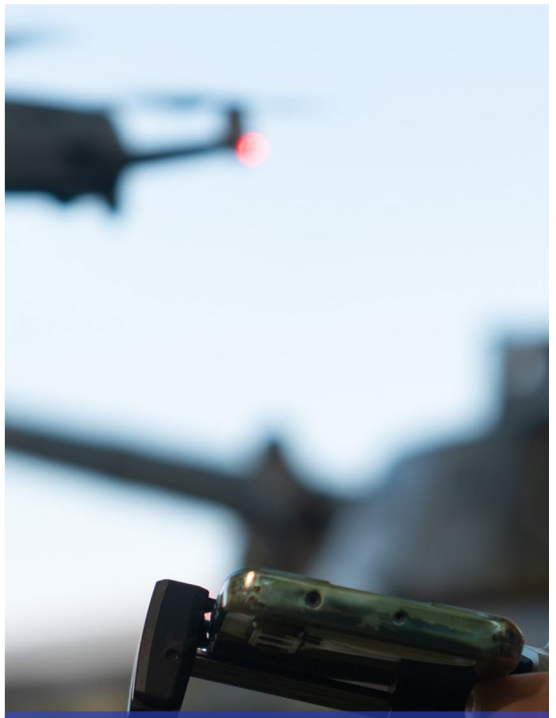


The macro picture is driving uncertainty



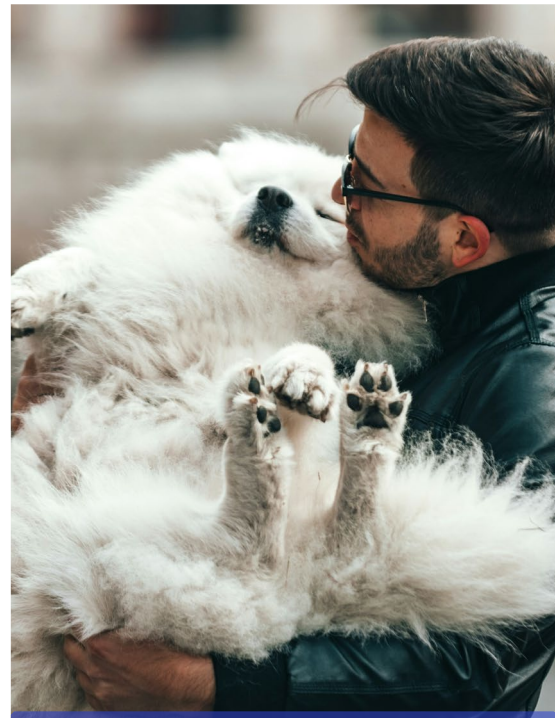
2.7°C

Current global warming trajectory by 2100



56

Active state-based conflicts in 2025

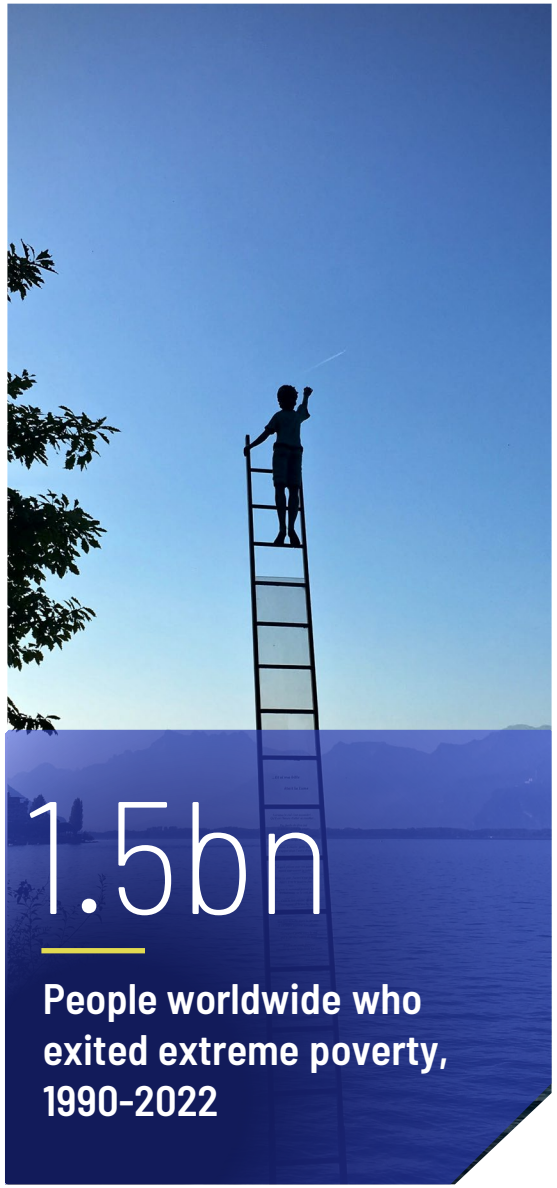


2.23

Global total fertility rate in 2026

Yet progress continues

Capabilities rise alongside risks



1.5bn

People worldwide who exited extreme poverty, 1990-2022



15-30%

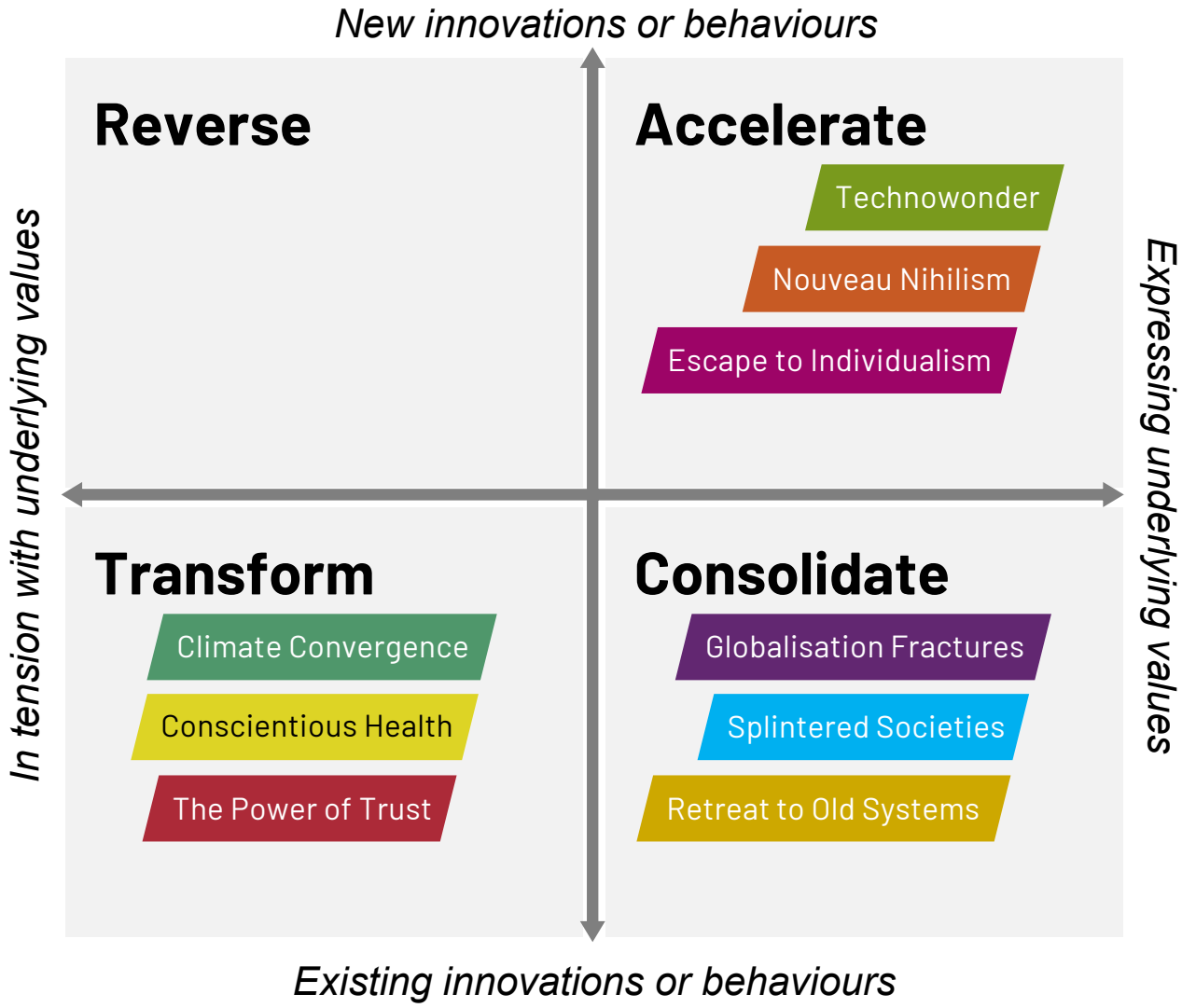
Potential reduction in clinical trial length through use of AI



7.5bn

People will have internet access by 2035; near-universal access

How our trend framework is evolving



The paradox of our restless decade

Our successes are increasingly experienced **individually**, while our problems are experienced **collectively**.

As consumers

We feel increasingly empowered.

Technology expands our choices.

We can improve our personal lives.

We seek individual solutions.

As citizens

We feel increasingly helpless.

Global problems feel difficult to influence.

We question whether society is progressing.

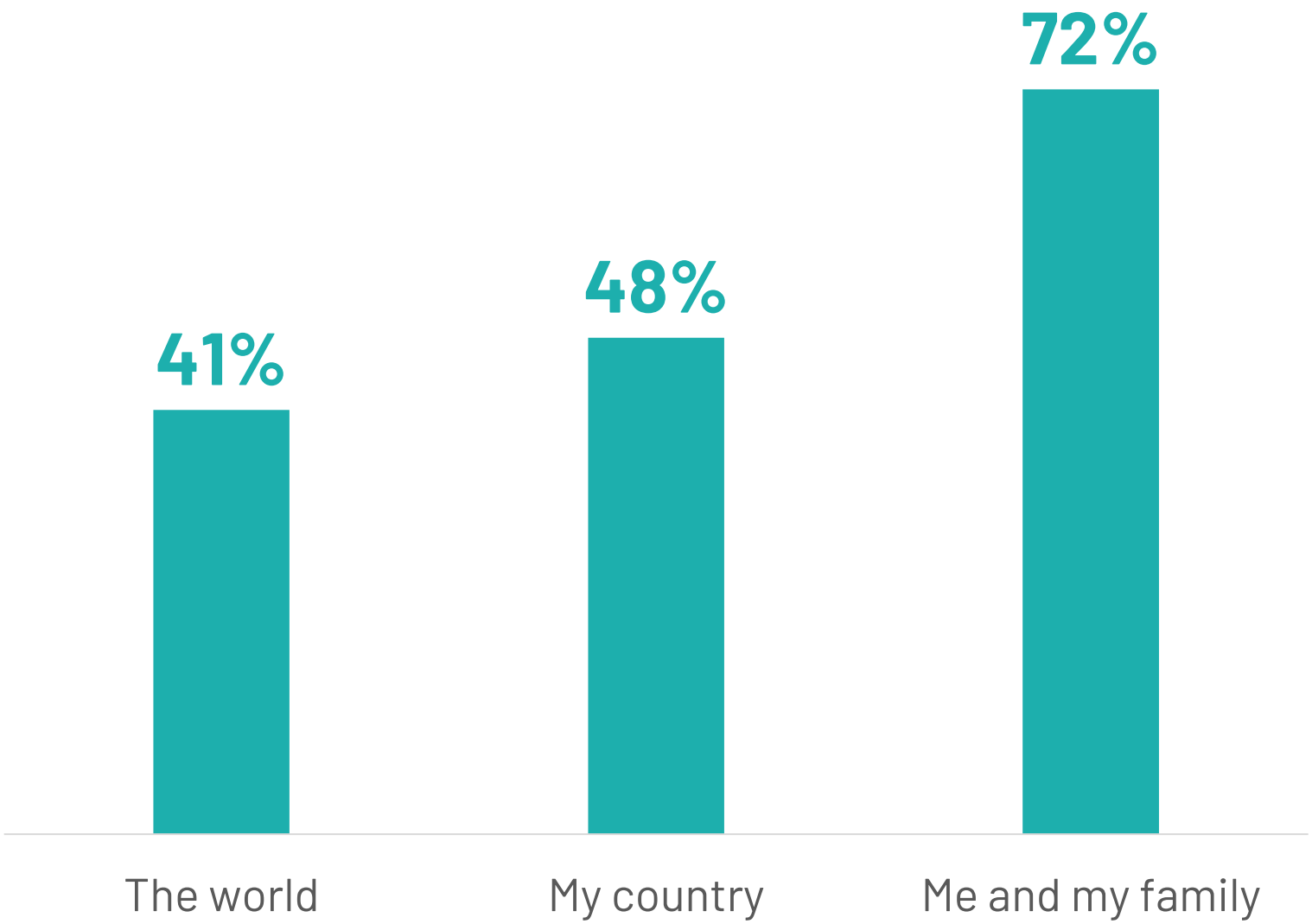
We face collective uncertainty.



We are more optimistic about ourselves and our families than the wider world.

Looking ahead to the next 12 months, are you optimistic or pessimistic about the following?

% very / fairly optimistic (Thailand)



A focus on the near-term

Whether it's attending concerts skipping saving for retirement, many are hyper-focused on how to navigate today



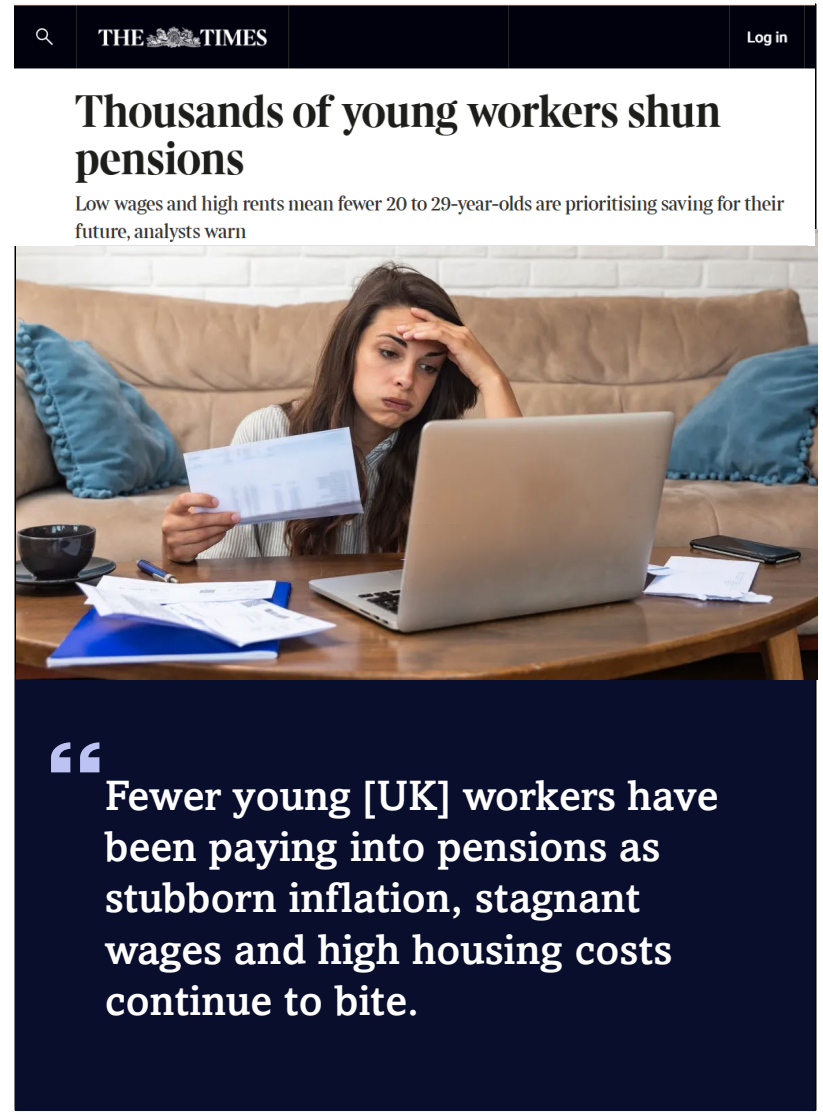
The New York Times

OPINION

GUEST ESSAY

Spend All Your Disposable Income on Events That Make You Feel Alive

Sept. 8, 2026



THE TIMES | Log in

Thousands of young workers shun pensions

Low wages and high rents mean fewer 20 to 29-year-olds are prioritising saving for their future, analysts warn

> "Fewer young [UK] workers have been paying into pensions as stubborn inflation, stagnant wages and high housing costs continue to bite.

A divided economy

More citizens are relying on **Buy Now Pay Later** for necessities such as groceries and gas, reflecting the economic crunch



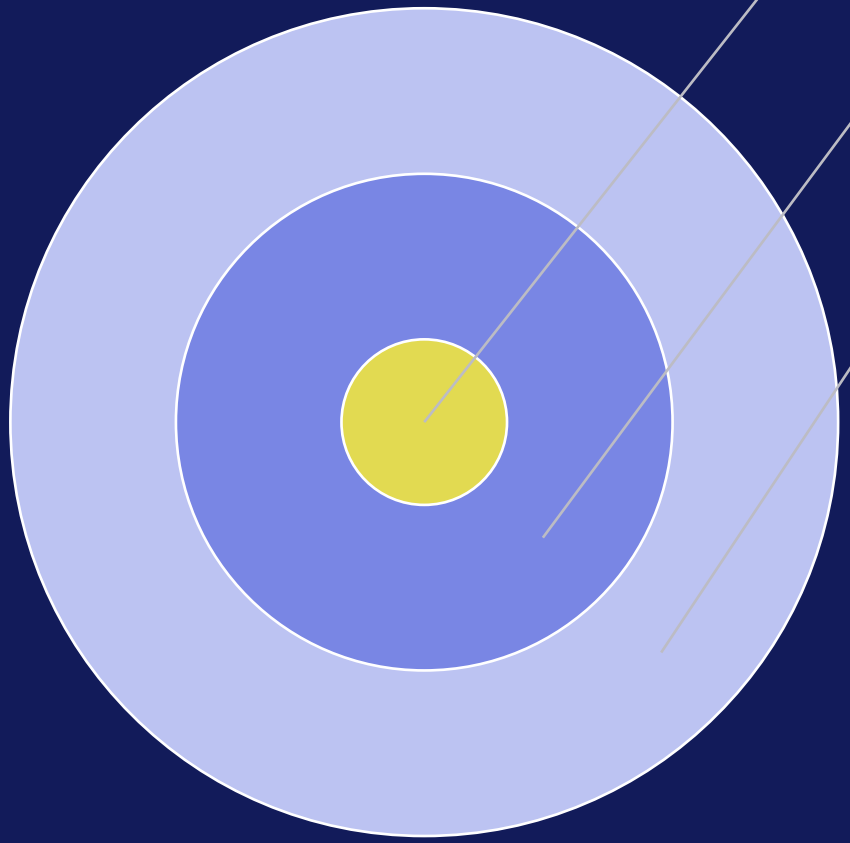




The growing use of **"PayLater"** credit solutions reflects how many Thai consumers are adapting to financial pressure by spreading payments over time, even for routine purchases.

The search for silver linings starts with the self

When people feel less control over the world, they seek more control over their own lives



A growing majority of Thais feel that the pace of change is becoming difficult to keep up with.



85% of Thais agree that the world today is **changing too fast**.

+6pp over two years

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Thailand Edition

From Uncertainty to Agency

When the world feels beyond our control, we turn towards the parts of life we can influence.

From		Towards
Worrying about tomorrow	→	Making today meaningful
Managing health problems	→	Taking ownership of wellbeing
Being constantly connected	→	Using technology purposefully
Buying into brand image	→	Seeking personal relevance



Understand how Thai consumers are redefining what it means to live better.

Present is Precious	Nouveau Nihilism / Escape to Individualism
Self-Care Imperative	Conscientious Health
Connected, Yet Seeking Control	Technowonder
Values Over Image	Escape to Individualism / The Power of Trust
Trust Deficit	Splintered Societies / The Power of Trust

Nouveau Nihilism | Escape to Individualism

PRESENT IS PRECIOUS

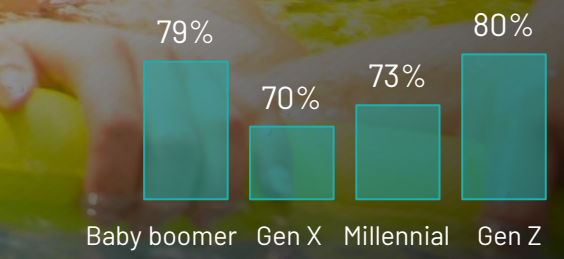
When tomorrow feels uncertain,
today becomes more valuable.



Living for today is becoming a persistent mindset among Thais across different life stages

75% The important thing is to enjoy life today; tomorrow will take care of itself.

+3pp over two years



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In a restless decade, slowing down may become an aspiration in itself.

But the desire to explore remains remarkably strong



83% wish they could slow down the pace of their lives.

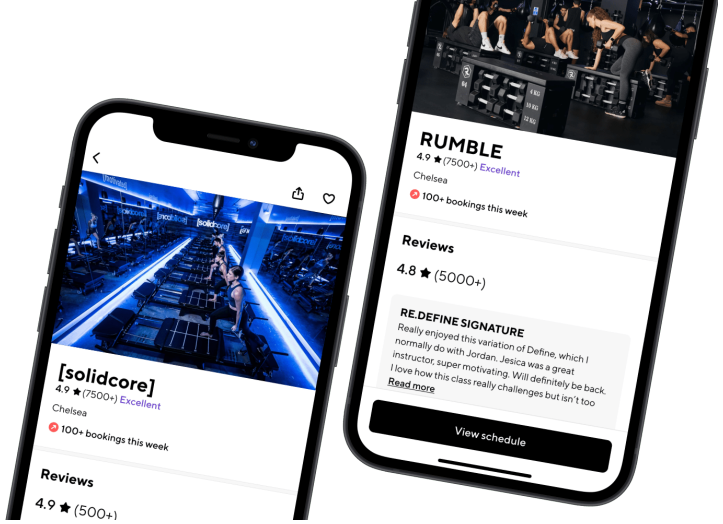
increased from 78% in 2025

87% would like to experience living in different parts of the world.

81% in 2025, 78% in 2024

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More life, less pressure



ClassPass:

Wellness without the pressure

Traditionally, wellness often felt like a commitment. Consumers had to choose a gym, commit to a membership, follow a programme and dedicate significant time and effort.

ClassPass lowers that pressure by giving people flexible access to different wellness activities, from yoga and pilates to recovery and fitness classes. Consumers can explore wellbeing in ways that fit their schedules, interests and budgets.



Duolingo:

Progress without the burden

Language learning has traditionally been associated with discipline, courses and long-term commitment. Duolingo reframes this entirely. Rather than positioning itself primarily as a language-learning platform, it increasingly promotes daily progress through small, manageable actions.

Conscientious Health

SELF-CARE IMPERATIVE

From surviving to living well



Almost every Thai consumer believes they need to do more for their health



96% agree: I need to do more to look after myself physically.

+4pp YoY

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The future of health is not just living longer. It is living better.



52% Thais expect to **live to be 100**

73% believe mental and physical health are equally important

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Recovery is becoming the new goal for improving health

85%

would like more control over decisions about their health.
(vs. 78% globally)

89%

agree they need to do more to look after their mental wellbeing.
(vs. 81% globally)

#1

health concern among Thais is mental health and stress.

The opportunity in health is to make it easier for consumers to live well.



AIA VITALITY

MAKING INSURANCE PART OF EVERYDAY HEALTH

AIA Vitality links insurance benefits with everyday behaviours such as exercise, sleep tracking, nutrition, health screening and preventive care. Members earn points and rewards for healthy actions, while eligible products can link healthier Vitality status to insurance benefits and cashback.



MTL

TURNING HEALTHY BEHAVIOUR INTO INSURANCE VALUE

MTL Fit Point turns everyday health activities into tangible insurance benefits. Customers can earn Fit Points through steps, exercise minutes and health-check results, with points linked to up to 15% off renewal premiums.

Technowonder

CONNECTED, YET SEEKING CONTROL

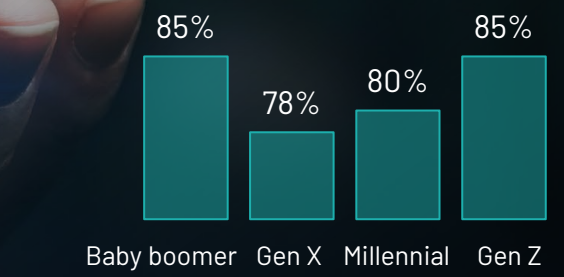
From digital dependence to meaningful empowerment



Digital dependence is not just a younger gen story

81% agree: I cannot imagine life without the internet.

+7pp over two years



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From technological possibility to personal usefulness

Thais are widely optimistic about AI, but its real value lies in making everyday life easier, better and more manageable.

74%

See more benefits than drawbacks (vs. 55% globally)

80%

of employed Thais say AI tools saved them time at work during the past year.

77%

Feel excited about AI, while **61%** feel nervous

Source: Ipsos AI Monitor 2026

Technology creates excitement through what it makes possible and earns relevance through what it makes easier.

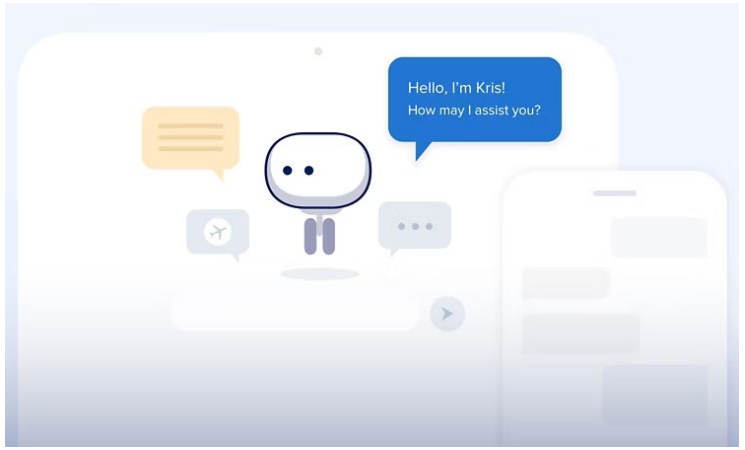


CommBank (Australia):

Customer Engagement Engine

Uses AI to proactively identify opportunities to save money, avoid fees and improve financial outcomes. Makes financial decisions easier without requiring customers to become financial experts.

By distilling complex financial data into simple, actionable prompts, it simplifies everyday decision-making. The system provides a meaningful control experience. Rather than automating decisions behind closed doors, the AI acts as an advisor—presenting highly relevant, timely options that empower customers to confidently direct their own financial future without having to be financial experts.



Kris the Chatbot (Singapore Airlines):

The bot that's always here for you

Demonstrates the power of AI when paired with practical utility and human-centred design. By moving away from rigid, frustrating menus, the upgraded generative AI bot acts as an intuitive, 24/7 travel concierge that resolves immediate practical needs—like real-time flight changes, baggage allowances, and waitlist updates. AI acts as a travel assistant rather than another channel consumers must learn. Following upgrades and a system relaunch, SIA reported that Kris nearly doubled customer satisfaction scores.

Make technology work for people

The opportunity is not just adoption. It is **trust**.

85%

Believe products and services should be required to disclose when AI is being used.

47%

Trust companies using AI to protect their personal information.

79%

Feel customer service is getting too automated and impersonal and only

35%

consider AI chatbots trustworthy.

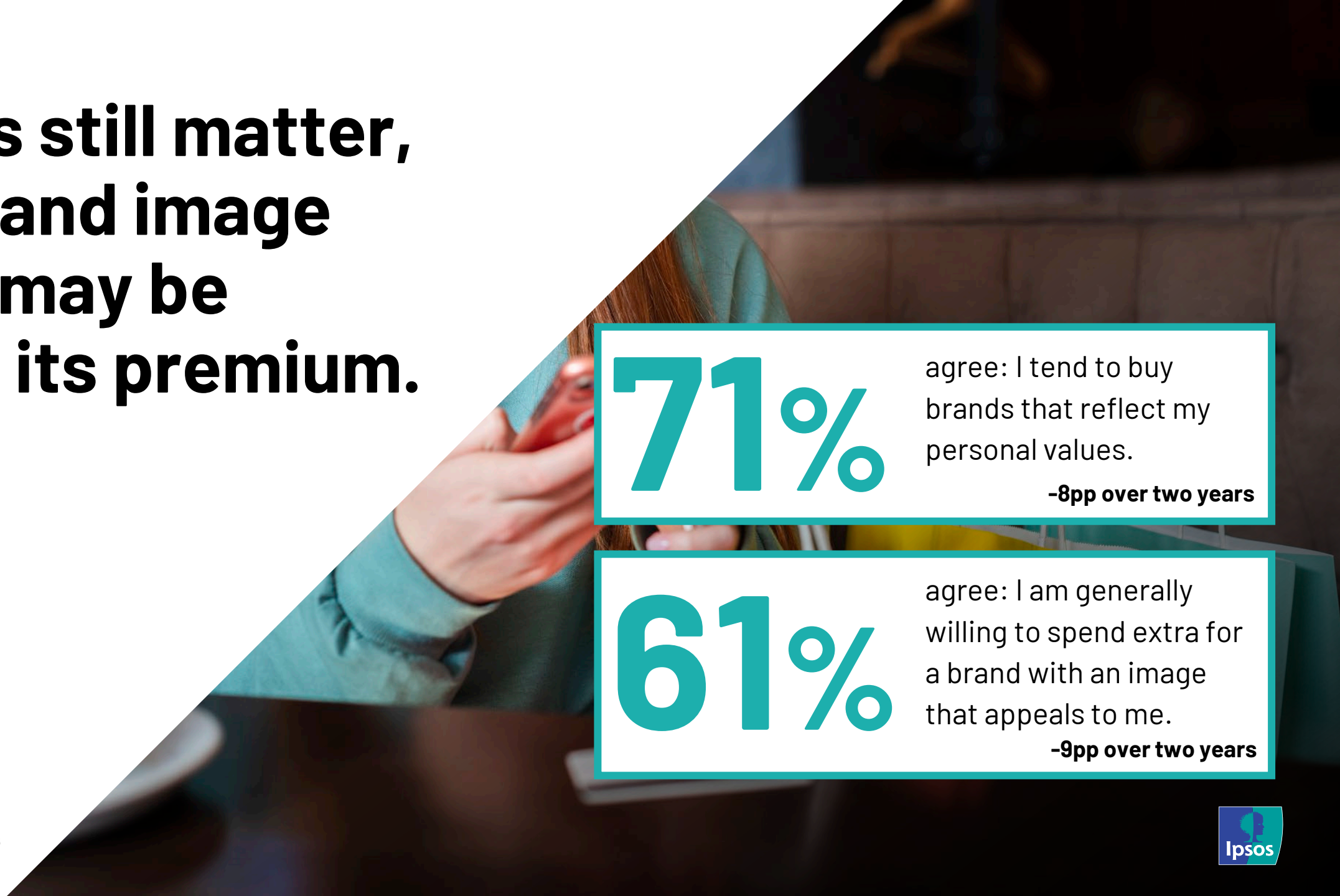
Source: Ipsos AI Monitor 2026, Ipsos Global Trustworthiness Index 2026

VALUES OVER IMAGE

From aspiration to personal relevance



Values still matter, but brand image alone may be losing its premium.



71% agree: I tend to buy brands that reflect my personal values.

-8pp over two years

61% agree: I am generally willing to spend extra for a brand with an image that appeals to me.

-9pp over two years

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Strong brands must connect emotional relevance with tangible consumer value.



IKEA:

Proudly Second Best

Rather than promoting an idealised vision of family life, IKEA celebrated the reality that parents' attention is often focused on their children rather than their furniture. The campaign created emotional resonance by recognising the pressures families face today, while reinforcing IKEA's practical proposition of designing products for real homes and real life. By connecting empathy with everyday utility, IKEA gave consumers both a reason to believe in the brand and a reason to choose it.

TRUST DEFICIT

From collective uncertainty to credible progress



More than 8 in 10 Thais worry that government and public services will do too little to help people in the years ahead.

84% express concern about future government and public support.

+3pp over two years



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Trust is built not only through brand familiarity, but also through demonstrating a meaningful social purpose.



81% are more likely to trust a new product if it is made by a brand they already know

87% agree: businesses have a duty to contribute to society, not just to make profits

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Thai consumers are not necessarily looking for more. They are looking for more control over what matters.

Present is Precious	→ Control over time
Self-Care Imperative	→ Control over wellbeing
Connected, Yet Seeking Control	→ Control through technology
Values Over Image	→ Control over personal choices
Trust Deficit	→ Confidence in the future

Even in uncertain times, the desire for a better life remains strong.

87%



Still want to explore

Would like to experience living in different parts of the world.

96%



Want to improve their health

Believe they need to do more to look after themselves physically.

81%



Embrace connectivity

Cannot imagine life without the internet.

75%

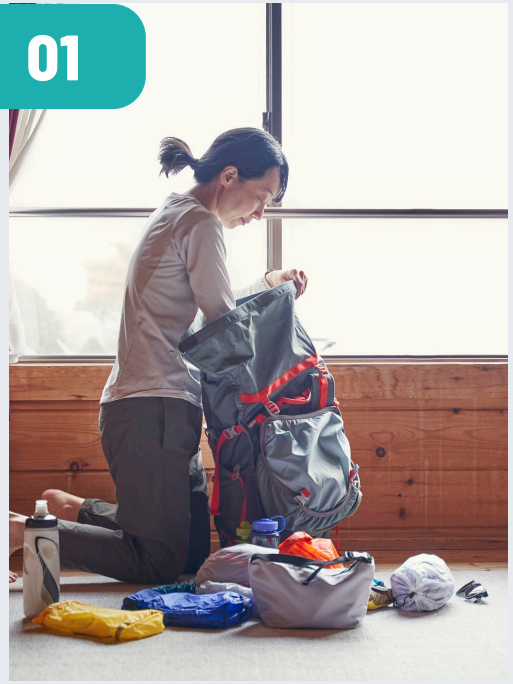


Value today's happiness

Believe the important thing is to enjoy life today.

Three rules for greater optimism

01



Build resilience

Take consumers' sides in adapting to an uncontrollable environment

02



Enable agency

Find ways for consumers to feel more in control

03



Make progress visible

Connect small wins into a better future people can see

For more insights:

Ipsos.com/en-th



METHODOLOGICAL ANNEX

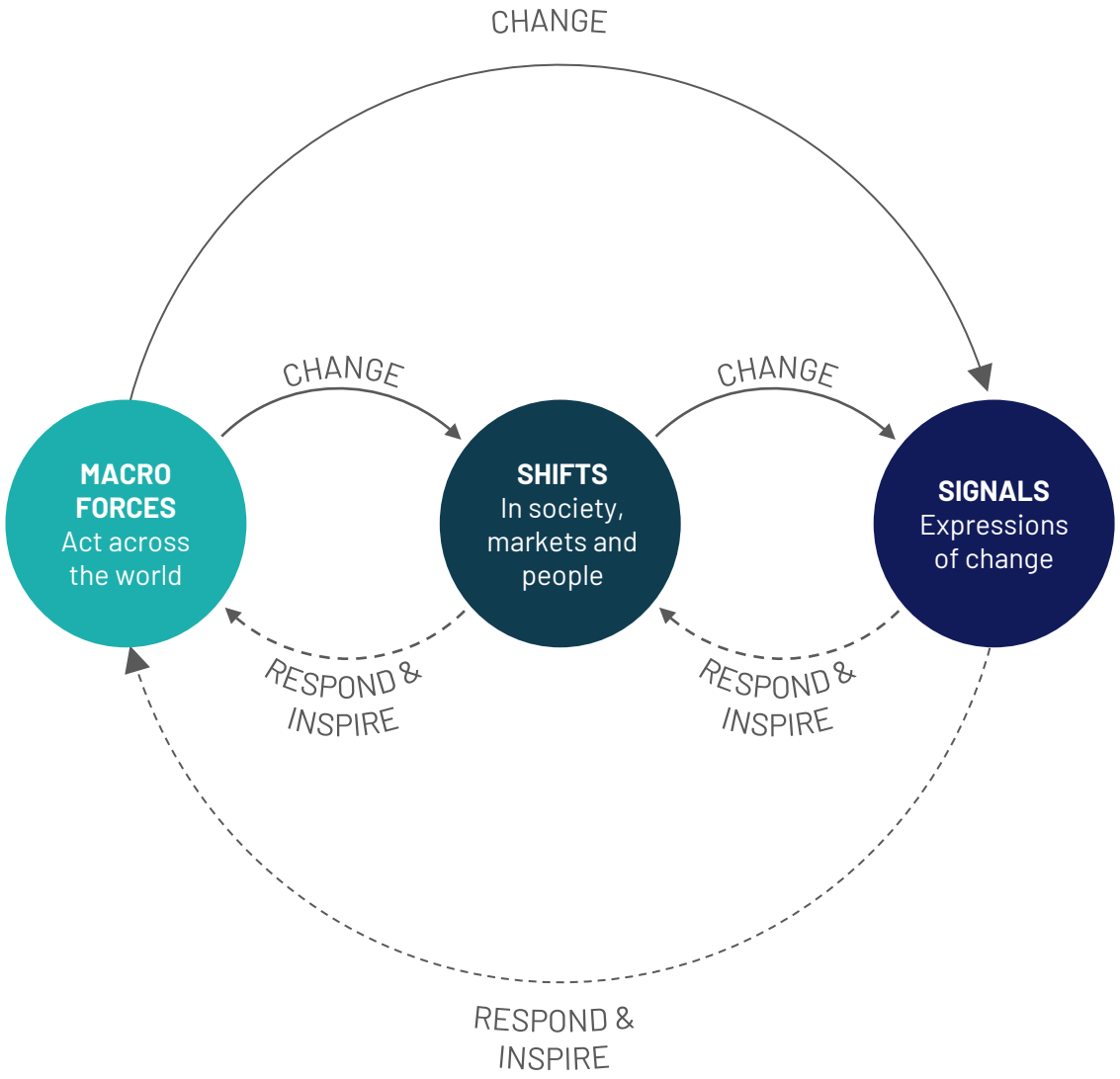


How we think about change

Our approach to understanding how trends and values change over time is built from our theory of change, which models how drivers of change can be found at different levels.

- **Macro Forces**: Operating at a planetary level, they work over a longer time horizon and have far-reaching impacts. They set the context against which people and organisations act.
- **Shifts in society**: Changing opinions, attitudes and values that we see among people as citizens and consumers.
- **Signals of the future**: Localised expressions of change that can be observed occurring at the level of a single country or a community within a specific area, such as a new product launch in India, or a new cultural phenomenon in Japan.

Our model acknowledges the role of feedback loops in understanding the complexity of our world. Recognising the circular nature of change and tension within this ecosystem allows Ipsos to develop and track robust trends and anticipate how they may evolve over time.



Survey methodology

These are the results of a 38-market survey conducted by Ipsos on its Global Advisor online platform, between Friday, May 22, and Friday, June 5, 2026.

For this survey, Ipsos interviewed a total of 29,542 adults aged 18 years and older in India, 18-74 in Canada, Hong Kong SAR, Republic of Ireland, Israel, Malaysia, New Zealand, South Africa, Türkiye, and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in all other countries.

The sample consists of approximately 1,000 individuals each in Australia, Austria, Belgium, Brazil, Canada, mainland China, France, Germany, Great Britain, Hong Kong SAR, India, Indonesia, Italy, Japan, New Zealand, Portugal, Romania, Spain, Türkiye, and the U.S., and 500 individuals each in Argentina, Chile, Colombia, Hungary, Ireland, Israel, Malaysia, Mexico, the Netherlands, Peru, Poland, Saudi Arabia, Singapore, South Africa, South Korea, Sweden, Thailand.

Samples in Argentina, Australia, Austria, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Ireland, Japan, the Netherlands, New Zealand, Poland, Portugal, Romania, South Korea, Spain, Sweden, and the U.S. can be considered representative of their general adult populations under the age of 75. Samples in Brazil, Bulgaria, Chile, mainland China, Colombia, Hong Kong SAR, India, Indonesia, Ireland, Israel, Malaysia, Mexico, Peru, Singapore, Saudi Arabia, South Africa, Thailand, and Türkiye are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more "connected" segment of their population.

The data is weighted so that the composition of each country's sample best reflects the demographic profile of the adult population according to the most recent census data. Any global or 38-market score reflects the average result for all the countries and markets in which the survey was conducted.

It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

When percentages do not sum up to 100 or the 'difference' appears to be +/-1 percentage point more/less than the actual result, this may be due to rounding, multiple responses, or the exclusion of "don't know" or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll where n=1,000 being accurate to +/-3.5 percentage points and of where n=500 being accurate to +/- 5.0 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules and regulations.

Methodological details on data from previous waves can be found on the Ipsos website.

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10th Edition

September 2026



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