IPSOS GENERATIONS REPORT 2026

Thailand Edition

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Thailand's Consumer Landscape Is Changing

Fewer births. An Ageing Population. A new consumer economy is emerging.

Thailand:

Population growth is slowing

Thailand's overall population growth has flattened after decades of steady expansion.

Fertility has remained below replacement level for decades

Birth rates have remained below replacement since 1989, reshaping the country's age structure.

Gen X is the country's largest economic force

Gen X now anchors consumer spending and purchasing power.

Gen Z is redefining consumption

Authenticity, discovery, and digital influence — not search — now drive purchase decisions.

Families are changing

As households evolve, Thai consumers are investing more in their pets' health, nutrition and everyday wellbeing.

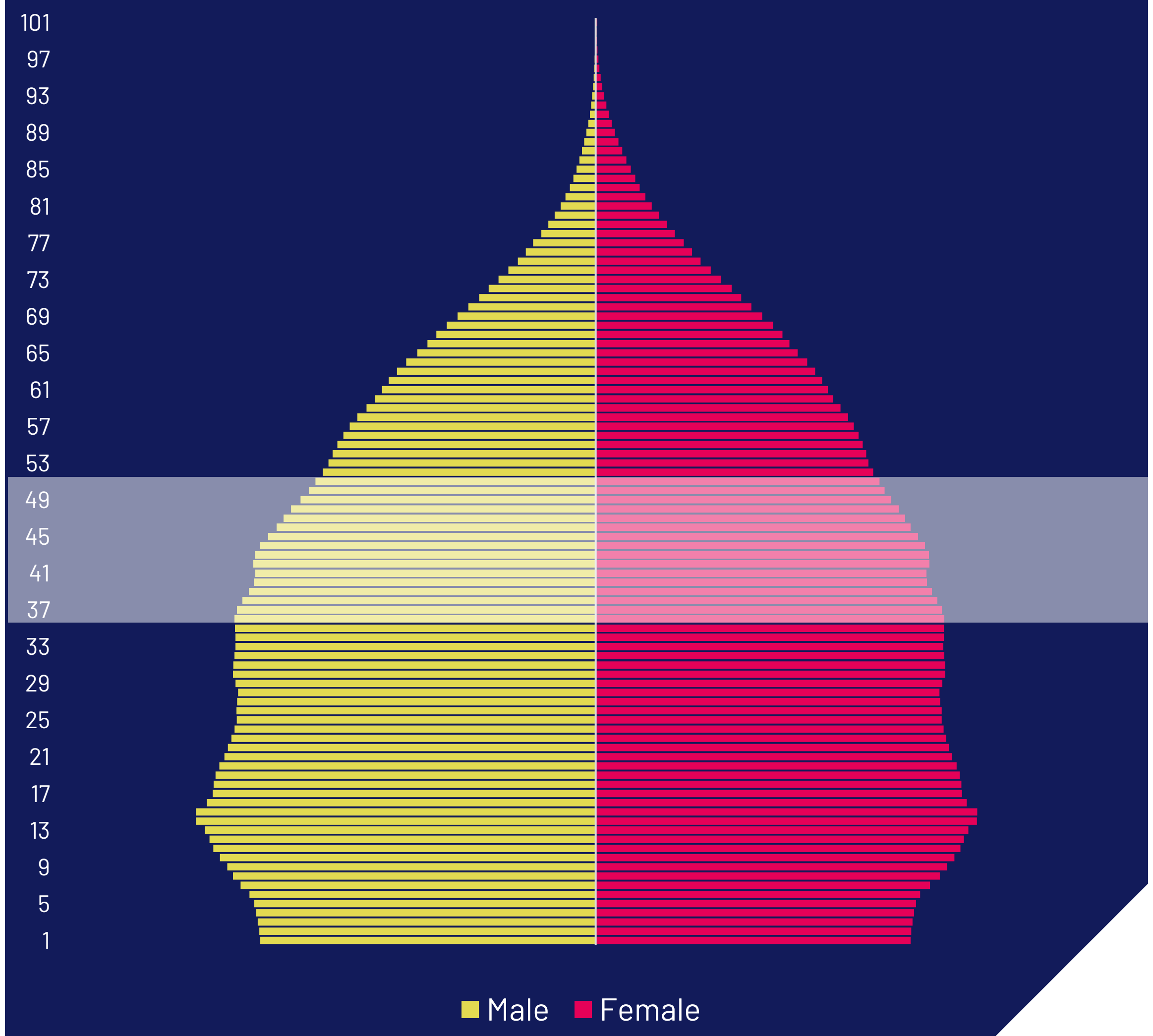
South-Eastern Asia

704.8M
CURRENT POPULATION

31.2
MEDIAN AGE

72.6
LIFE EXPECTANCY

2026 population pyramid

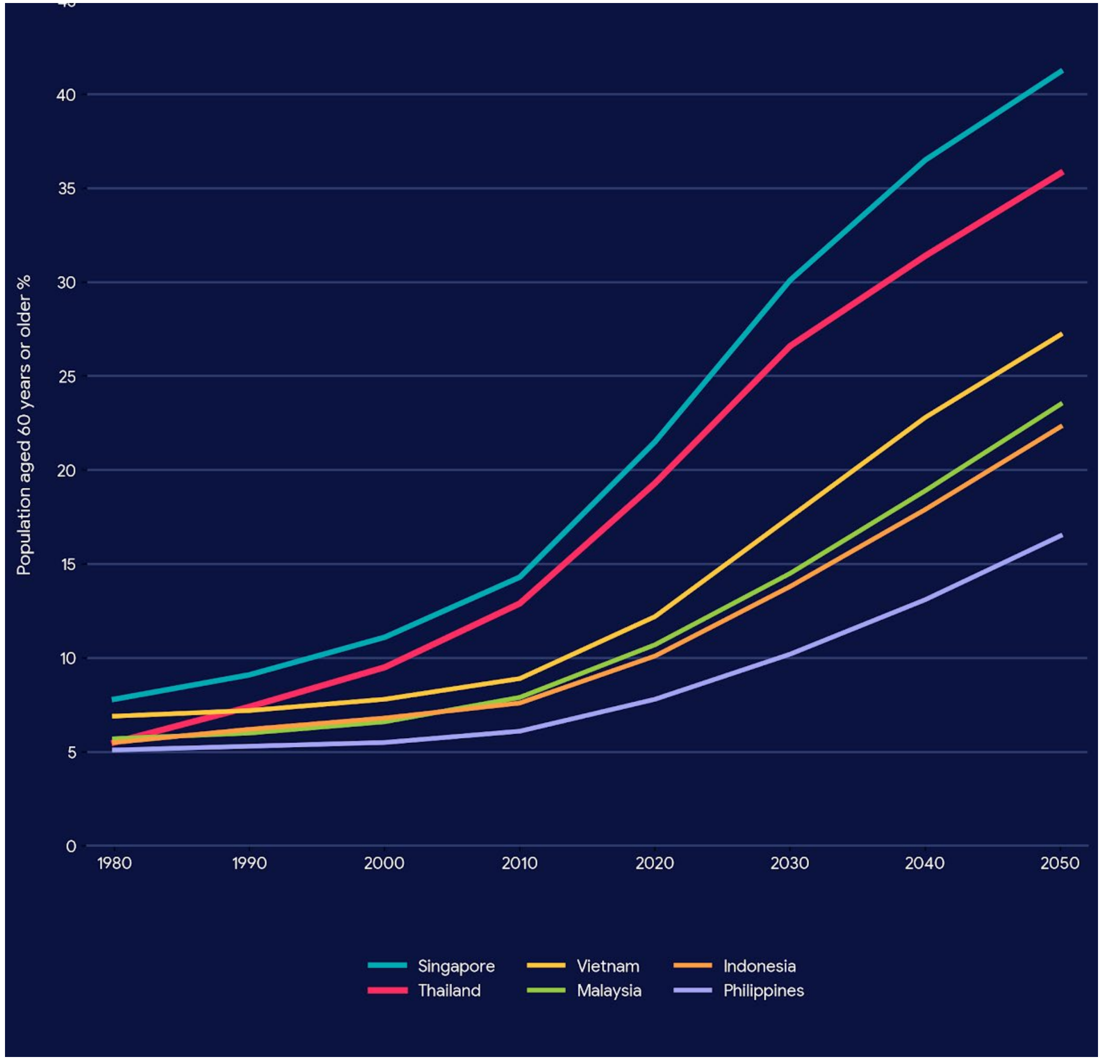


South-East Asia is getting older – Thailand leads the shift

Thailand is one of ASEAN's fastest-ageing societies, second only to Singapore.

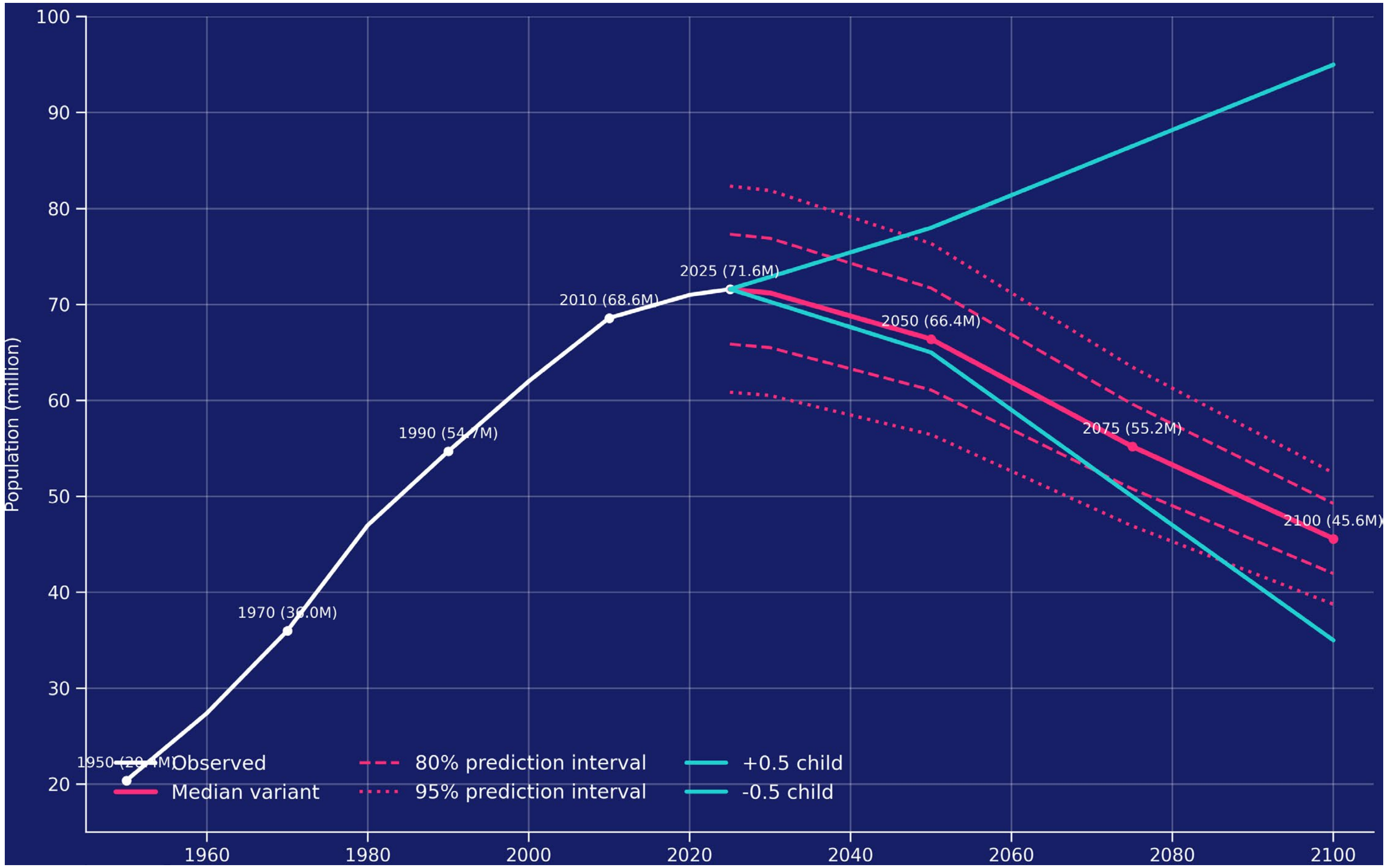
One in Three Thais will be aged 60+ by 2050, making older consumers a mainstream market.

Ageing will reshape consumption - not just healthcare - creating new opportunities across F&B, beauty, finance, housing, retail and travel.



Source: United Nations World Population Prospects: The 2024 Revision

Thailand- An ageing society, a shrinking base of young consumers



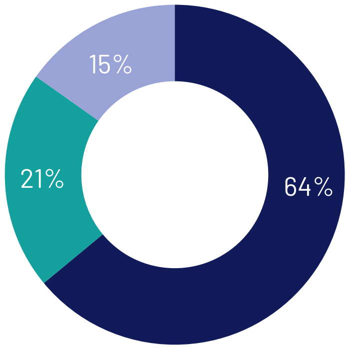
65.9 million

Thailand's current population

Men: **71.9 yrs** Women: **80 yrs**

Life expectancy at birth, by gender

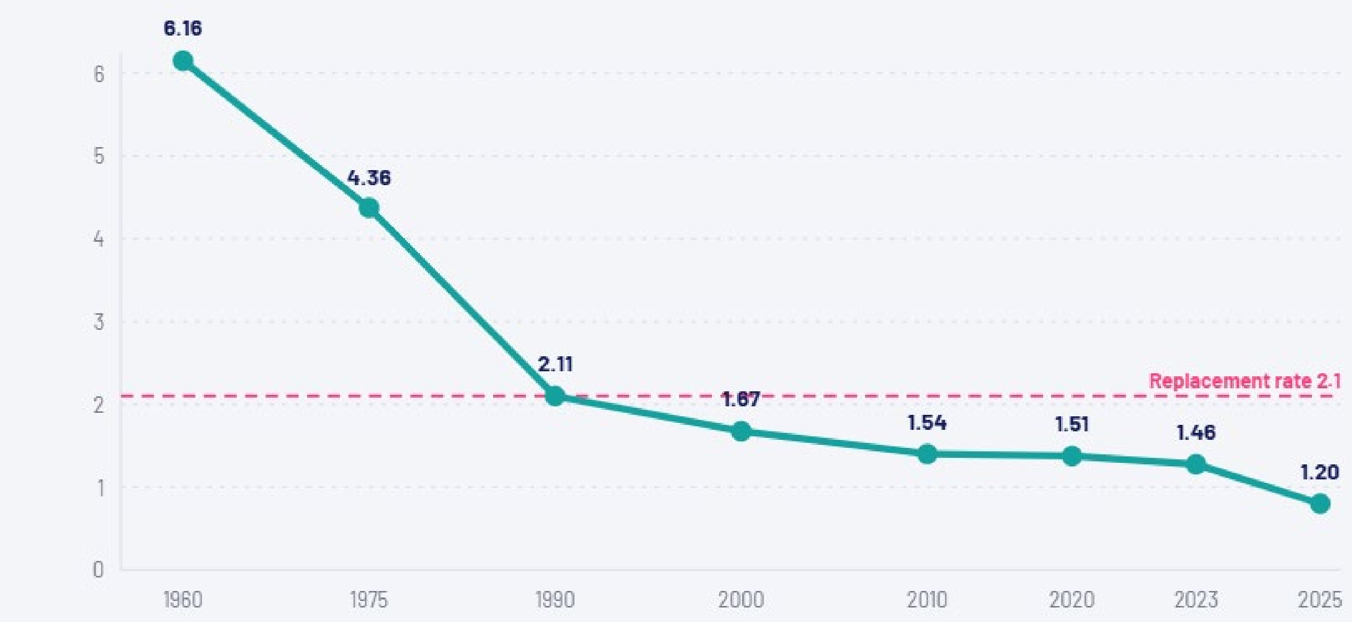
Population by age group



- 15–59 years: 42.2M
- Elderly 60+: 13.7M
- Children <15: 10M

Source: United Nations, DESA, Population Division (World Population Prospects 2022), Thailand National Statistical Office (NSO), Statistical Yearbook 2025.

Thailand's fertility rate has collapsed



1989

below replacement fertility since

4.36

children per woman in 1975

1.20

children per woman in 2025

Future growth will increasingly come from serving older consumers better, not from a growing young population.

Source: United Nations, World Population Prospects 2024

Fertility rates have been falling across the region for five decades

Thailand's fertility rate has declined, signaling a future shaped by population aging and a shrinking workforce

Sources: United Nations, *World Population Prospects 2024* https://population.un.org/wpp/; World Bank https://data.worldbank.org/indicator/SP.DYN.TFRT.IN https://statbase.org/data/tha-fertility-rate/

Total Fertility Rate	1975	2000	2020	2025	5-year decline
AUSTRALIA	2.15	1.77	1.59	1.50	-6%
CHINA	3.57	1.63	1.24	1.02	-18%
JAPAN	1.92	1.35	1.3	1.15	-12%
INDIA	5.19	3.35	2.05	1.9	-7%
INDONESIA	5.10	2.50	2.19	2.10	-4%
MALAYSIA	4.20	2.90	1.70	1.60	-6%
PHILIPPINES	5.80	3.75	2.08	1.88	-10%
SINGAPORE	2.07	1.60	1.10	0.87	-21%
SOUTH KOREA	3.43	1.48	0.84	0.75	-11%
THAILAND	4.36	1.73	1.26	1.20	-5%
VIETNAM	5.25	2.25	1.96	1.88	-4%

While fertility decline is a global trend, Thailand is aging faster than most ASEAN peers and is beginning to resemble Northeast Asian markets in its demographic structure

	Australia	China	India	Indonesia	Japan	Malaysia	Philippines	Singapore	South Korea	Thailand	Vietnam
MEDIAN AGE	39	41	29	31	50	32	26	43	45	41	34
LIFE EXPECTANCY	84	79	73	71	85	77	71	84	84	77	75
PERCENTAGE 65+	18%	15%	8%	7%	30%	8%	6%	19%	20%	16%	9%
PERCENTAGE 15-24 Y.O.	12%	12%	17%	16%	10%	17%	19%	14%	10%	14%	15%
TOTAL FERTILITY RATE	1.5	1.03	1.93	2.10	1.23	1.54	1.91	0.9	0.8	1.20	1.89
PEAK FERTILITY YEAR (1950 to Present)	1961	1963	1964	1962	1950	1957	1955	1957	1960	1953	1963
FIRST YEAR BELOW REPLACEMENT RATE (TFR=2.1)	1976	1991	2020	2024	1957	2013	2021	1975	1983	1989	2000
TIME FROM PEAK TO BELOW REPLACEMENT RATE (in years)	15	28	56	62	7	56	66	18	23	36	36

Sources: United Nations, *World Population Prospects 2024* https://population.un.org/wpp/; World Bank https://data.worldbank.org/indicator/SP.DYN.TFRT.IN

https://www.population-trends-asiapacific.org/data/population-ageing/THA

Sizing the generations: Asia

Thailand's population is shifting towards older generations

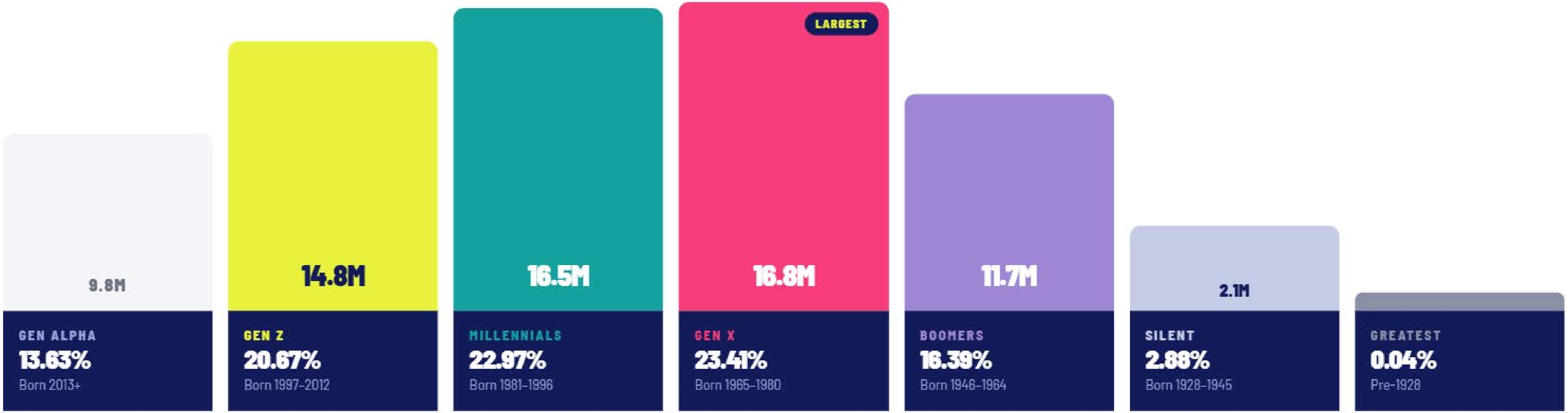
	Gen Alpha	Gen Z	Millennials	Gen X	Boomers	Silent	Greatest
AUSTRALIA	16.30%	20.01%	22.70%	19.12%	17.62%	4.20%	0.04%
CAMBODIA	22.10%	28.30%	22.90%	15.40%	9.50%	1.75%	0.05%
CHINA	13.52%	18.70%	24.04%	24.41%	17.01%	2.31%	0.01%
INDIA	22.09%	27.55%	24.31%	16.28%	8.81%	0.96%	0.00%
INDONESIA	22.14%	25.34%	23.29%	18.90%	9.41%	0.92%	0.00%
JAPAN	10.17%	15.53%	17.12%	23.27%	24.06%	9.70%	0.16%
LAOS	23.40%	28.65%	22.85%	14.20%	8.80%	2.05%	0.05%
MALAYSIA	17.20%	26.15%	26.40%	18.25%	10.25%	1.70%	0.05%
MYANMAR	19.10%	25.60%	24.50%	17.80%	10.80%	2.15%	0.05%
PHILIPPINES	22.80%	27.45%	23.90%	15.15%	8.85%	1.80%	0.05%
SINGAPORE	9.60%	18.75%	26.90%	22.50%	17.80%	4.25%	0.20%
SOUTH KOREA	8.90%	16.97%	22.25%	25.71%	21.66%	4.48%	0.04%
THAILAND	13.63%	20.67%	22.97%	23.41%	16.39%	2.88%	0.04%
VIETNAM	17.85%	22.50%	25.80%	19.85%	11.60%	2.35%	0.05%

- **Thailand's generational mix now resembles China** more than many ASEAN neighbours.
- **Gen X and Millennials make up almost half of the population**, driving today's consumer economy.
- **Smaller Gen Alpha and Gen Z cohorts** signal slower growth from younger consumers in future.

Source: United Nations, Department of Economic and Social Affairs, Population Division (2024). *World Population Prospects: The 2024 Revision*, custom data acquired via website.

Six generations, 71 million people

Gen X and Millennials together make up 46% of Thailand - while children under 15 are already outnumbered by Boomers.



Gen X (23.4%) is the single largest generation in Thailand – larger than in Indonesia, India or Vietnam

Where will future growth come from?

Different generations create different opportunities for brands.

The Powerhouses: THB 7.6 Trillion in Spending

Two generations now anchor Thailand's consumer economy - for very different reasons.

GEN X - THE FUTURE FORCE

THB 5 Trillion

in purchasing power

Thailand's single largest spending bloc - built on peak career earnings and multi-generational household responsibility

GEN Z - THE EARLY FORCE

THB 2.6 Trillion

in purchasing power

Entering the market earlier- and with more independent influence - than any generation before it. Discovery-native, mobile-first, price-aware but value-driven

Implication: *with two very different generations driving spending, marketing must shift from age-based targeting to life-moment based strategies.*

Source: Media Intelligence Group

TODAY'S GROWTH ENGINE: GEN X

Thailand's most influential consumers today

The Sandwich Generation: Gen X at the Peak

Thailand's wealthiest generation is also its most stretched - financially responsible for two generations at once, while quietly worried about a third: themselves.

Ageing Parents

Gen X
54% of Thai Gen X manage care for parents, children, and their own households simultaneously.

Children

Primary caregivers for both ageing parents and children - the middle layer carrying the household.

62%

of Thai Gen X feel **financially unprepared** for their own retirement - despite holding the country's largest purchasing power.

Lack of preventive health behaviours

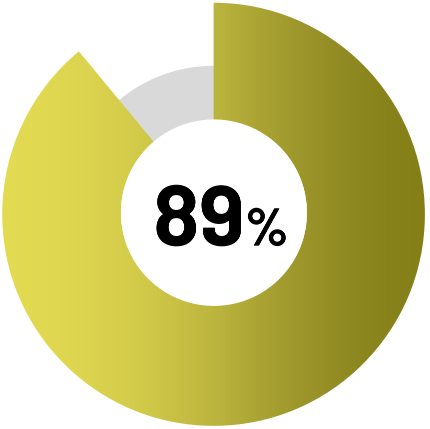
Most are concerned about chronic diseases and medical expenses, yet only **35%** of Thai Gen X undergo annual health check-ups.

Wealthy but insecure

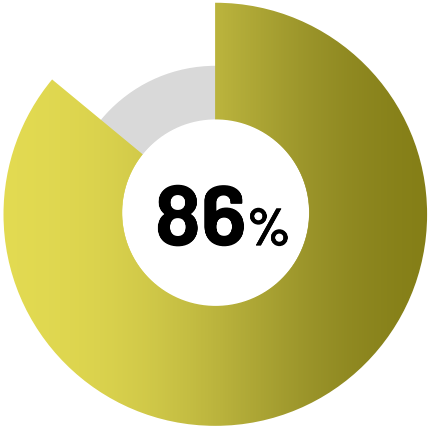
68% of Thai Gen X still rely mainly on cash, reflecting a lack of confidence in financial products and investment options.

Source: Media Intelligence Group

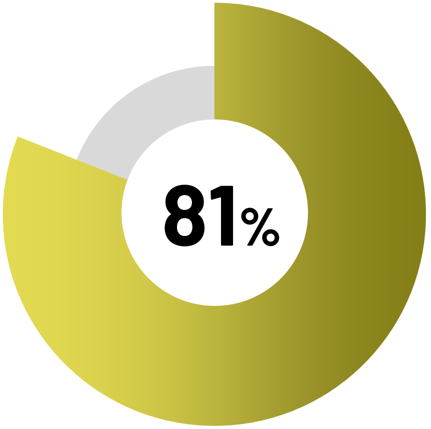
Gen X Reframes Midlife:
Prioritizing Personal Appearance, Connection, and Health



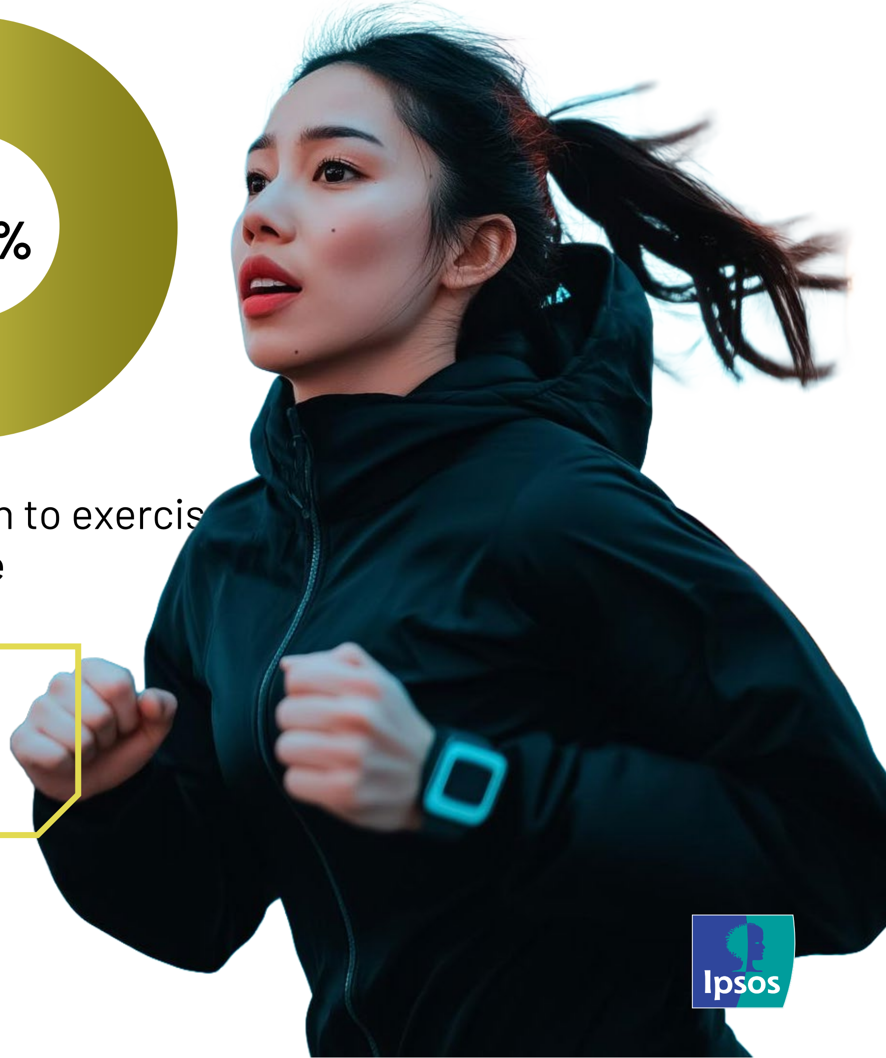
of Thai Gen X want to spend more time with family and friends



of Thai Gen X will spend more time on their appearance



of Thai Gen X plan to exercis more

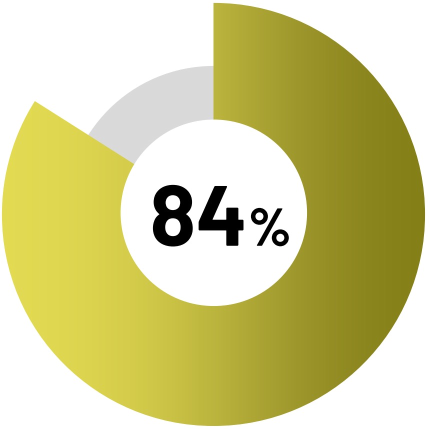


Thai Gen X leads all generations in prioritizing personal appearance while maintaining an equally strong focus on spending time with loved ones and staying active. In their peak earning years, this is an opportunity for premium self-care, anti-aging, and professional aesthetics.

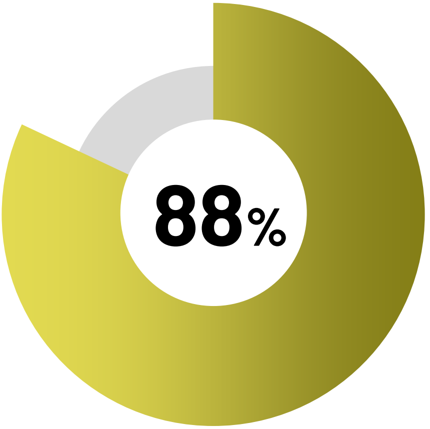
Source: Ipsos Global Advisor

The Self-Directed Health Consumer

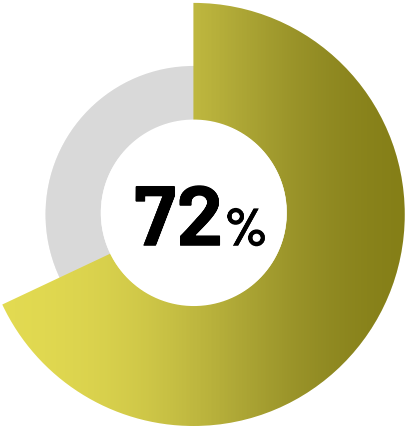
Thai Gen X consumers are not waiting for the system. They are building their own.



of Thai Gen X would like more control over decisions about their health



Of Thai Gen X always try to find out healthcare information by themselves rather than relying on what their doctor says



Of Thai Gen X often take health decisions (over the counter drugs, home remedies, etc.) independently without consulting a doctor or a medical professional (vs. 59% globally)

80% of Thai Gen X are comfortable having **AI recommend health treatments** based on their medical history (vs. 51% globally).

Source: Ipsos Global Trends, Health Service Report, PwC

Healthy lifestyle is a shared goal - but longevity isn't

CROSS-GENERATION · HEALTH ATTITUDES

Where the generations agree – and don't

Statement	Boomer	Gen X	Millennial	Gen Z
Do more to look after physically	82%	96%	93%	91%
Do more for mental wellbeing	89%	90%	86%	87%
Want more control over health decisions	82%	84%	87%	84%
Self-research healthcare, not just doctor	80%	88%	82%	81%
Expect to live to 100	52%	39%	49%	59%

Health attitudes are converging across generations, with a shared desire to take greater control of wellbeing. **Despite Thai Gen X leading on health actions, it emerges as the most proactive yet least optimistic generation about living to 100.**

Source: Ipsos Global Trends

From problem-solving to prevention – results-driven beauty

Thailand's skincare market has crossed **USD 3B** in 2025 and is growing at 5.39% CAGR to 2030. The Silver Age is the growth engine - anti-ageing has moved from niche to mainstream.

Skincare Market: Thailand

USD 3B

62%

Of Thai Gen X consumers identify ageing as a key skin concern

60%

Of Thai Gen X look for claims with 'anti-' communication

What Gen X wants from beauty

Gen X consumers gravitate to **anti-ageing, results-driven products** that solve existing skin concerns – favouring:

- **Simplicity** over elaborate multi-step routines
- **Proven efficacy** – visible results within weeks
- **Trusted brands** and dermatologist endorsement
- **Loyalty** – 3× less brand-switching than Gen Z

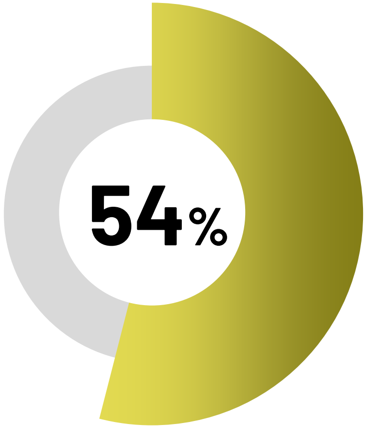
Category shift: *mainstreaming of anti-ageing is compressing the "premium tier" – brands that once targeted 45+ women are now bought by 30+ shoppers building preventive routines.*

Source: The Report Cube, Mintel

Financial confidence is under pressure – but Gen X remains open to AI

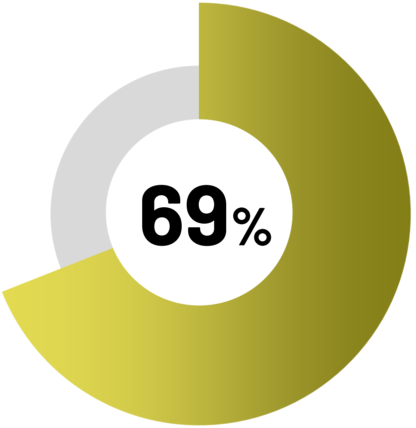
As retirement approaches, many Thai Gen X consumers feel less confident about their future finances, yet remain receptive to AI-powered financial guidance

Q: Compared to 6 months ago, are you NOW more or less confident of your ability to invest in the future, including your ability to save money for your retirement or your children's education?



of Thai Gen X feel ***less confident*** about ability to invest in the future including retirement or children's education

Q: AI is currently or might someday be used for the following tasks. How comfortable, if at all, are you having these tasks performed primarily by AI?



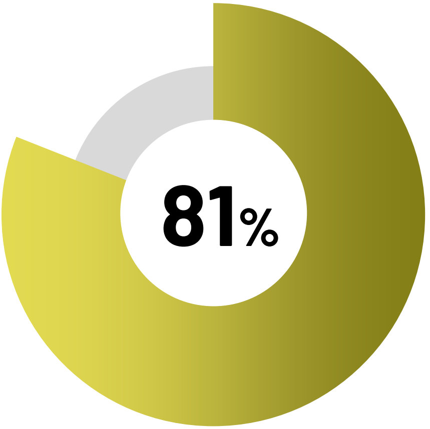
of Thai Gen X are ***comfortable*** with AI helping to advise or manage their personal finances

Source: Ipsos Global Advisor

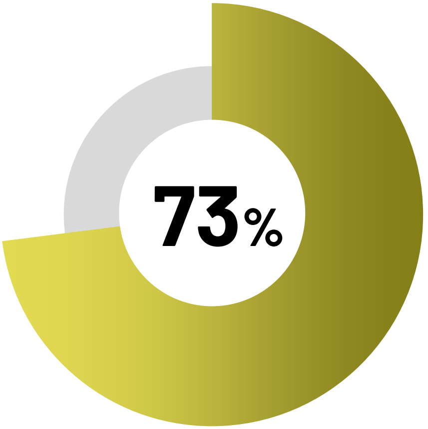
Security has become essential in digital finance

Falling prey to scammers is still the main concern for most Thais when it comes to financial issue.

Q: How concerned are you about the following challenges in your financial life?



Of Thai Gen X are concerned about accidentally transferring money to a **suspicious or wrong account**



Of Thai Gen X are concerned about being targeted by **financial scams or phishing attempts**

Q: Below are specific ways AI could be used in banking and financial services. For each one, please rate how much you would WANT this feature.
(Data for Gen X)

91% Detect and block suspicious transactions in real time before money leaves my account

87% Identify if a message, link, or call I've received might be a scam

82% Warn me before transferring money to a fraudulent account

Consumers expect AI to protect their money

A demand for AI-driven banking security, prioritizing real-time fraud intervention and scam detection.

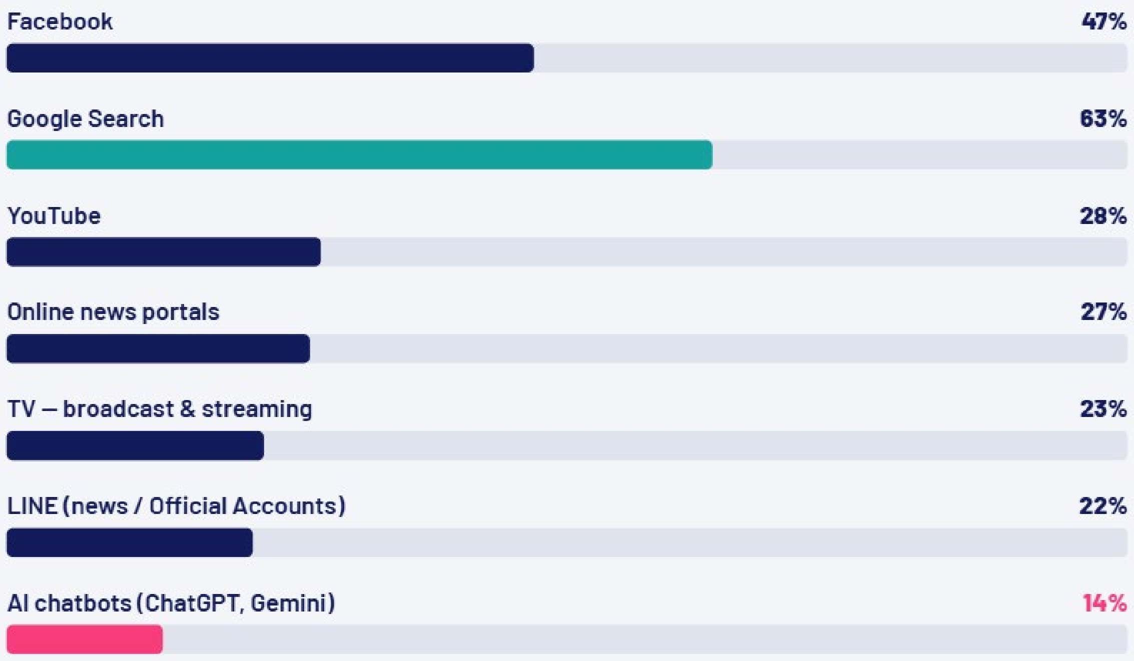
Source: Ipsos.Digital FastFacts, April 2026 Thailand, Ages 20-60, N=300

Thai Gen X is not digitally left behind

While established platforms remain central to everyday information discovery, Gen X is also engaging with AI for practical needs - and shows strong confidence in its potential to improve their lives.

WHERE 45-60 THAIS FIND NEWS & INFO

Facebook and Google still lead



AI USAGE – THAI GEN X

Older generations are more excited about AI than younger ones

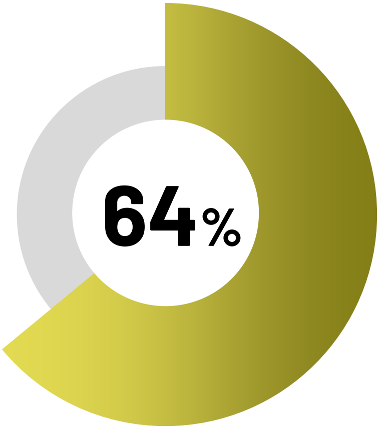
What have you used AI for? (multi-select · % by age band)

	20–29	30–44	45–60
Answer questions / info	73%	81%	81%
Summarise content	57%	66%	69%
Compare / decision support	46%	55%	56%
Health & wellness questions	40%	54%	54%

51% of Thai Gen X believe AI will improve their health in the next 3-5 years – highest confidence of any generation, after Boomers

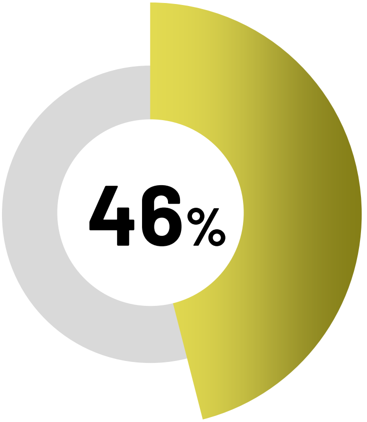
Source: Ipsos.Digital FastFacts, April 2026 Thailand, Ages 20-60, N=300

Potential for Brands to connect with the largest segment



of Thai Gen X say they are **looking forward** to old age.

However,



Of Thai Gen X also say they are often **discriminated against** because of their **age**

Source: Ipsos Global Trends, Ipsos Generations Report

Brands getting it right

BRAND'S has increasingly positioned Essence of Chicken as a daily cognitive wellness supplement for working adults, highlighting benefits such as mental alertness, focus and resilience rather than simply providing energy. Recent campaigns have focused on adults balancing demanding careers, family responsibilities and healthy ageing, reinforcing preventative wellbeing instead of reactive healthcare.

Anlene has evolved beyond promoting bone health to supporting healthy ageing and mobility. Its latest Anlene Gold range incorporates protein, collagen, MFGM and vitamin B12, while its digital Move Check assessment encourages adults to proactively monitor their mobility and remain active as they age. Rather than focusing on ageing as decline, the brand positions it as staying independent and active.

TRYLAGINA is evolving its Thai skincare proposition around the changing needs of 40+ skin, moving beyond generic anti-ageing claims into targeted, results-driven solutions. Its Age-Defying Serum was developed through 5 years of formulation work and 1,300 volunteers, addressing wrinkles, elasticity and skin firmness – reflecting Gen X's growing focus on maintaining healthy, youthful-looking skin as they age.

Brands getting it right

BDMS Wellness Clinic has expanded beyond traditional healthcare by positioning preventive health and longevity as lifelong investments rather than treatments for illness. Through comprehensive health screenings, biological age assessments and personalized wellness programs, the clinic reflects Gen X's growing focus on proactive health management, healthy ageing and extending quality of life.

Sansiri's 'Setthasiri' developments are designed around the needs of Thailand's multigenerational households, with flexible layouts, timeless architecture and spaces that accommodate both ageing parents and growing families. By prioritizing long-term liveability, quality and enduring value over trend-driven design, the brand reflects Gen X's preference for homes that support evolving family needs while serving as a lasting investment.

Siam Commercial Bank expanded its "Fraud Fighter" financial literacy platform by launching the "Aunty Savvy Outsmarts the Scams" series, designed specifically for older adults. Through entertaining videos, practical scam scenarios and easy-to-share educational content, the initiative helps consumers recognize AI-enabled fraud, verify suspicious transactions and protect lifelong savings, reflecting the growing need for financial security as digital scams become more sophisticated.

TOMORROW'S GROWTH ENGINE: GEN Z

The generation shaping tomorrow's marketplace

Moments of life - not age - drive the purchase

Lifestyle behaviour among Thai Gen Zs

78% University students who compare prices before buying

61% University students who research independently

54% Students rely on recommendations from people close to them

23% Students are motivated by current trends

Early-career professionals shift focus to quality, value and loyalty to trusted brands as they gain stable income.

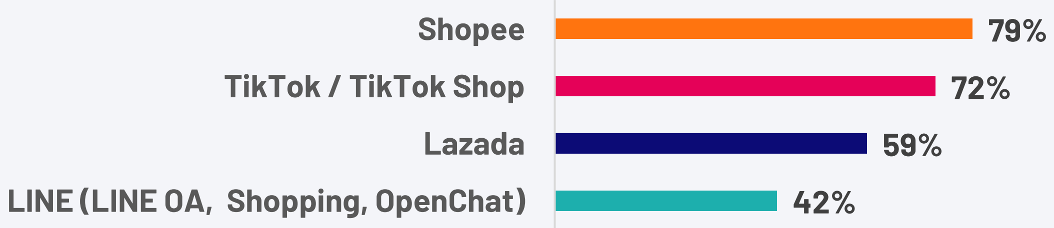
Purchases serve as an expression of personal identity and values, shaped more by emotional meaning than by price.

Where Thai Gen Z Spends

- **Beauty & personal care**
- **Fashion**
- **Entertainment**

72% of Thai Gen Zs are willing to spend extra for a brand with an image that appeals to them

How Thai Gen Z Shops: Top Apps Used



Social commerce is particularly strong among Thai Gen Zs with TikTok Shop nearly matching Shopee in monthly usage.

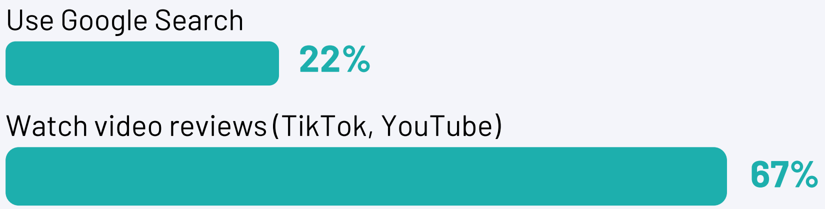
Source: Ipsos Global Trends, Ipsos Digital FastFacts, Media Intelligence Group,

Discovery-based content beats search, and AI is an assistant - not the decider

Gen Z is building a hybrid decision journey: AI for efficiency, humans for trust.

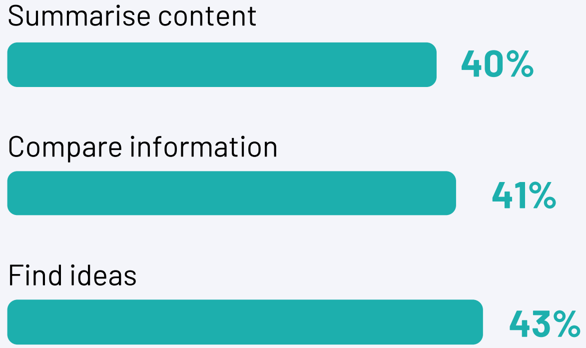
Where discovery really happens

63% of Thai Gen Z trust product or brand recommendations from influencers more than direct brand messaging



YouTube is the leading platform that supports both short and long formats, with a preference **of 78% among Gen Z consumers**. This is followed by **TikTok, Instagram and Facebook.**

AI: a decision-making assistant for Thai Gen Zs

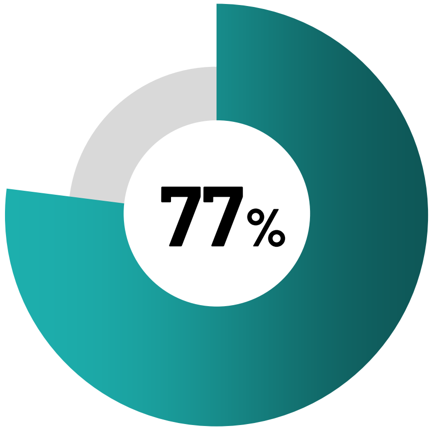


Only 12% often buy based on AI recommendations. Influencers still have nearly 2x the impact on buying decisions as AI summaries.

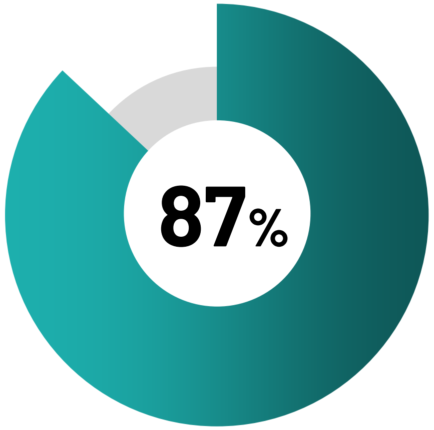
The Human Element remains decisive – AI is a research assistant, not a decision maker.

Source: Ipsos CX Data, YouGov

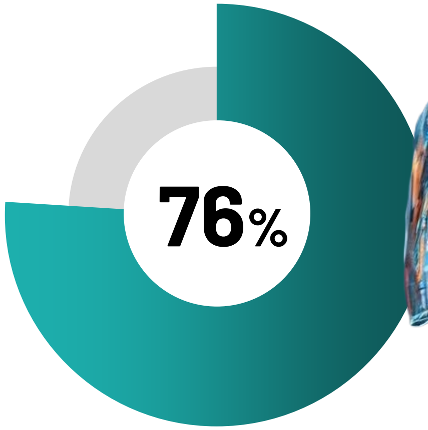
As true digital natives, Gen Z actively leverage generative AI and digital tools for productivity



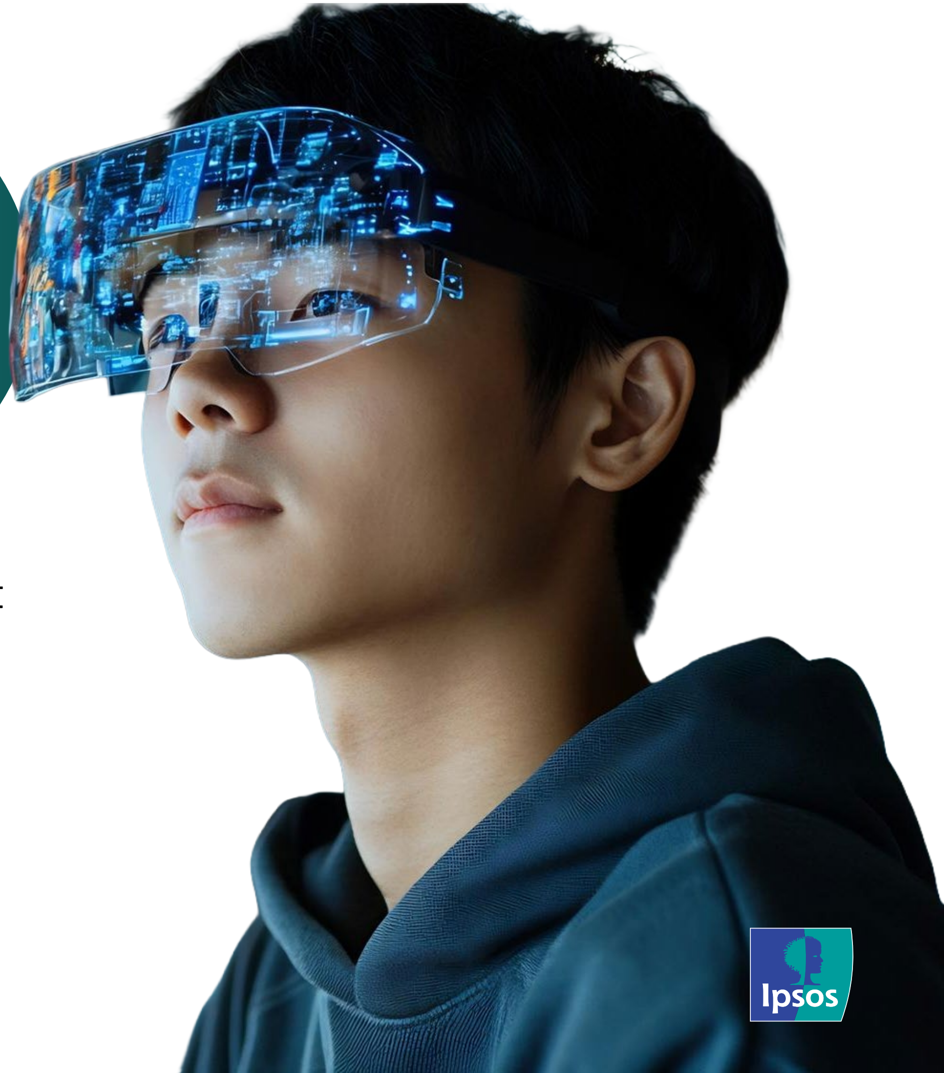
Of Thai Gen Z say they understand AI and can explain how it works to others



Of Thai Gen Z report using AI in their day-to-day work



Of Thai Gen Z report AI tools have saved them time at work



Source: Ipsos Digital FastFacts, Deloitte 2026 Global Gen Z and Millennial Survey, Ipsos AI Monitor

Redefining beauty through skincare, digital discovery and local brand confidence

Skin-first

Healthy skin is the new beauty standard

Beyond makeup, Thai Gen Z is increasingly investing in skincare, with greater attention to ingredient efficacy and prevention.

More than **60%** **Global Gen Zs** research ingredients before buying

65% **Global Gen Zs** prefer clean formulations

70% **Global Gen Zs** value transparency in product claims

Digital-first

Online & social commerce dominate discovery

Discovery, reviews and purchases for facial beauty products increasingly happen through digital channels.

Over **70%** **Global Gen Zs** discovers beauty products online first, with TikTok, Instagram, and YouTube as the leading discovery channels

Around **65-70%** **Global Gen Zs** relies on reviews, user-generated content, and peer content before purchasing

Local-first

Thai brands are earning Gen Z trust

Young consumers are increasingly open to Thai skincare brands when products combine science, local relevance and engaging storytelling.

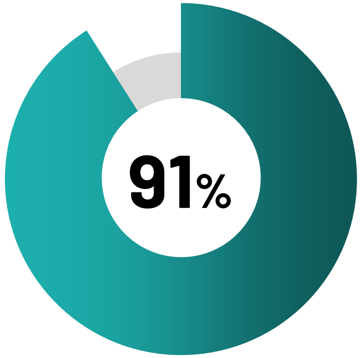
Among **Thai Gen Z**, purchase consideration of ***Srichand*** surpasses **30%**, more than double the category's Gen Z benchmark, underscoring its strong appeal with younger consumers and potential for long-term growth

72% **Thai Gen Z** are willing to spend extra for a brand with an image that appeals to them

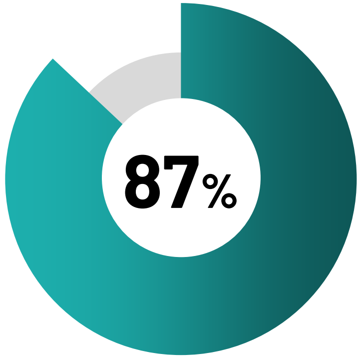
Source: Ipsos Global Trends, BeBold Digital, YouGov

Health & Wellness: Mental Wellbeing is Becoming Gen Z's Top Health Priority

Gen Z is shifting from reactive healthcare to proactive wellbeing, creating strong demand for personalized, evidence-based health solutions that support both physical and mental wellness.



of Thai Gen Z said I need to do more to look after myself physically



of Thai Gen Z said I need to do more to look after my mental wellbeing

MENTAL WELLBEING & STRESS OVER CANCER

61% of Thai Gen Z say they often think about their mental wellbeing

67% of Thai Gen Z have felt stressed to the point where it had an impact on how they live their daily life

Top 3 Health Problems Rating by Thai Gen Z

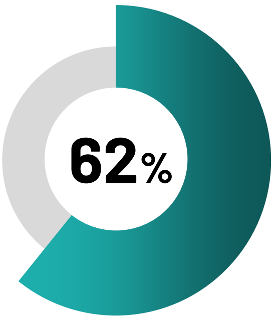
Stress	**36%**
Mental Health	**28%**
Cancer	**27%**

Source: Ipsos Global Trends, Ipsos Heatlh Service Monitor, McKinsey & Company, Deloitte

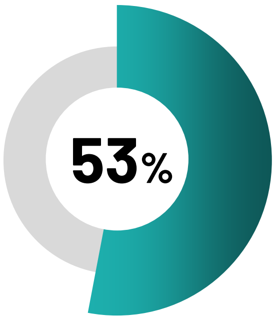
Food: AI-driven decisions, elevated convenience, and health-conscious consumption are redefining the category.

AI-Powered Food Choices:

Gen Z is more likely than Gen X to connect food choices with technology and personalization.



Of Thai Gen Z use AI for personalized fitness and wellness planning



Of Thai Gen Z use AI for meal planning and nutrition recommendations

Premium Convenience:

Convenience remains essential, but expectations are rising.

Thai Gen Z seeks:

- Gourmet frozen meals
- Elevated instant food options
- Clean-label ingredients
- Minimal preservatives

The new standard = convenience + quality

Calm Luxury & Functional Drinks:

Thai Gen Z embraces photogenic, customizable beverages inspired by East Asian food culture.

Trending flavors

Matcha • Pistachio • Taro

Popular add-ons

Plant Protein • Collagen • Prebiotics

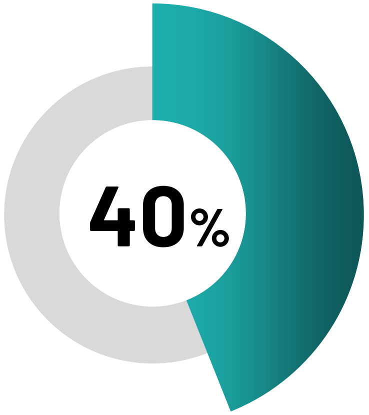
Source: PwC, USDA Foreign Agricultural Service, GrabFood Thailand

Food as the bridge between beauty and health

Gen Z is increasingly looking to food and beverages to deliver benefits beyond basic nutrition - from gut health and beauty to broader wellness.

WELLNESS STARTS FROM WITHIN

Gut health is becoming a major wellness priority, with Gen Z particularly interested in foods and beverages offering digestive benefits.

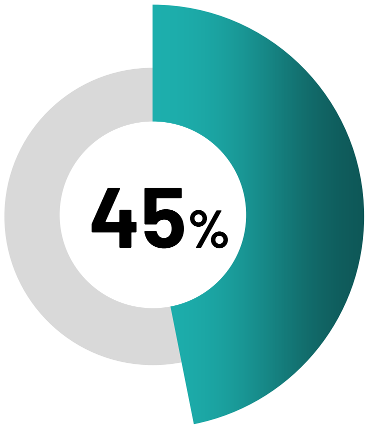


Of Global Gen Zs actively try to improve their gut health

BEAUTY INGREDIENTS ENTER FOOD & BEVERAGES

Gen Z is driving demand for ingestible beauty products. Collagen is one of the clearest examples, moving from supplements into drinks and other everyday consumption formats.

For Global Gen Zs, beauty and wellness are increasingly interconnected:
"better appearance" ranks among their top three wellness priorities globally.



Of European Gen Z shoppers prioritize healthy nutrition - the highest of any generation.
And **1 in 3 Gen Z consumers** are willing to pay a premium for healthier products.

FUNCTIONAL FOODS BECOME MAINSTREAM

As consumers seek more specific health benefits, functional nutrition is moving from specialist products into everyday consumption.

Source: McKinsey & Company, GlobalData

Financially ambitious - but economic uncertainty is reshaping how they plan their future

Gen Z balances living in the present while preparing for an uncertain future.

Financial independence is a priority

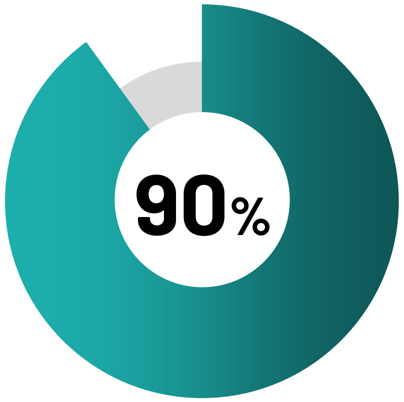
60% of Thai Gen Z say financial independence is a key life goal, 57% have clear financial plans

Economic uncertainty is delaying life milestones (education, entrepreneurship, and starting a family)

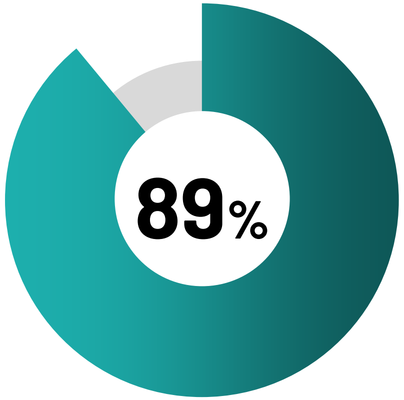
65% of Thai Gen Z have delayed major life decisions because of their financial situation.

They are responding by building financial resilience

70% of Thai Gen Z save and/or invest every month, 19% of income goes to savings, 8% of income goes to investments



of Thai Gen Z say they live for today because the future is uncertain



Of Thai Gen Z also agree it's important that I save today because the future is uncertain

Source: Ipsos Global Trends, VISA, Bangkok Post

Brands getting it right

SAPPE Beauti Drink has transformed beauty beverages from a niche functional product into an everyday self-care ritual for younger consumers. By combining beauty benefits with convenient ready-to-drink formats and collaborations across the beauty and wellness ecosystem, the brand taps into Gen Z's growing interest in holistic wellbeing.

SRICHAND has reinvented its heritage beauty positioning for Gen Z by moving beyond its iconic powder heritage into skincare and lifestyle-led beauty solutions. Through its SRICHAND IN-SKIN launch and collaboration with BamBam, the brand connects with younger consumers through fandom culture, self-expression and Thai beauty pride.

Dr. Pong has built one of Thailand's fastest-growing skincare brands by making ingredient transparency and scientific evidence central to its positioning. Through dermatologist-led education on TikTok and other digital platforms, the brand explains how active ingredients such as retinol, niacinamide and vitamin C work, helping consumers make informed skincare choices. Dr. Pong has built trust through science-backed formulations and educational content.

Brands getting it right

BRAND'S Veta Jelly has expanded the functional nutrition category by introducing ready-to-consume jelly supplements enriched with ingredients such as collagen, vitamins and dietary fibre. Offering targeted formulas for skin health and eye health, the brand makes wellness simple, portable and accessible, reflecting Gen Z's preference for functional nutrition that fits seamlessly into busy, on-the-go lifestyles.

OH! Juice has expanded beyond cold-pressed juices into a broader portfolio of functional beverages and wellness products, including protein smoothies, prebiotic and gut-health drinks, and collagen-infused options. By making functional nutrition convenient and accessible, the brand reflects Gen Z's growing preference for beverages that deliver health benefits alongside everyday enjoyment.

MAMA has refreshed its 50+ year heritage by moving beyond being an instant noodle staple into a lifestyle brand designed for Gen Z. Through its MAMACREW campaign featuring six youth-relevant personalities across music and creator culture, alongside premium flavours and new experiences, the brand is making instant noodles more expressive, social and connected to younger consumers' lifestyles

Brands getting it right

True Corporation introduced 5G MyPlan, Thailand's first fully customizable mobile plan, allowing customers to tailor data, calls and lifestyle benefits to their individual needs. Combined with the launch of YOU Club, the initiative reflects Gen Z's preference for flexibility, control and personalized experiences rather than one-size-fits-all offerings.

IKEA's KOMPISHÄNG collection has reimagined home furnishing for Gen Z first-jobbers by introducing affordable, portable furniture designed around rental living, career mobility and urban lifestyles. Offering multifunctional pieces that are easy to move and personalize, the collection helps young adults create spaces that reflect their evolving identities - turning home into a form of self-expression while adapting to life transitions.

Kiatnakin Phatra's Dime! investment platform lowers the barriers to investing by offering fractional investing, a simple mobile-first experience and educational content designed for first-time investors. The platform reflects Thai Gen Z's growing desire for financial independence by making wealth building more accessible, flexible and less intimidating for young consumers.

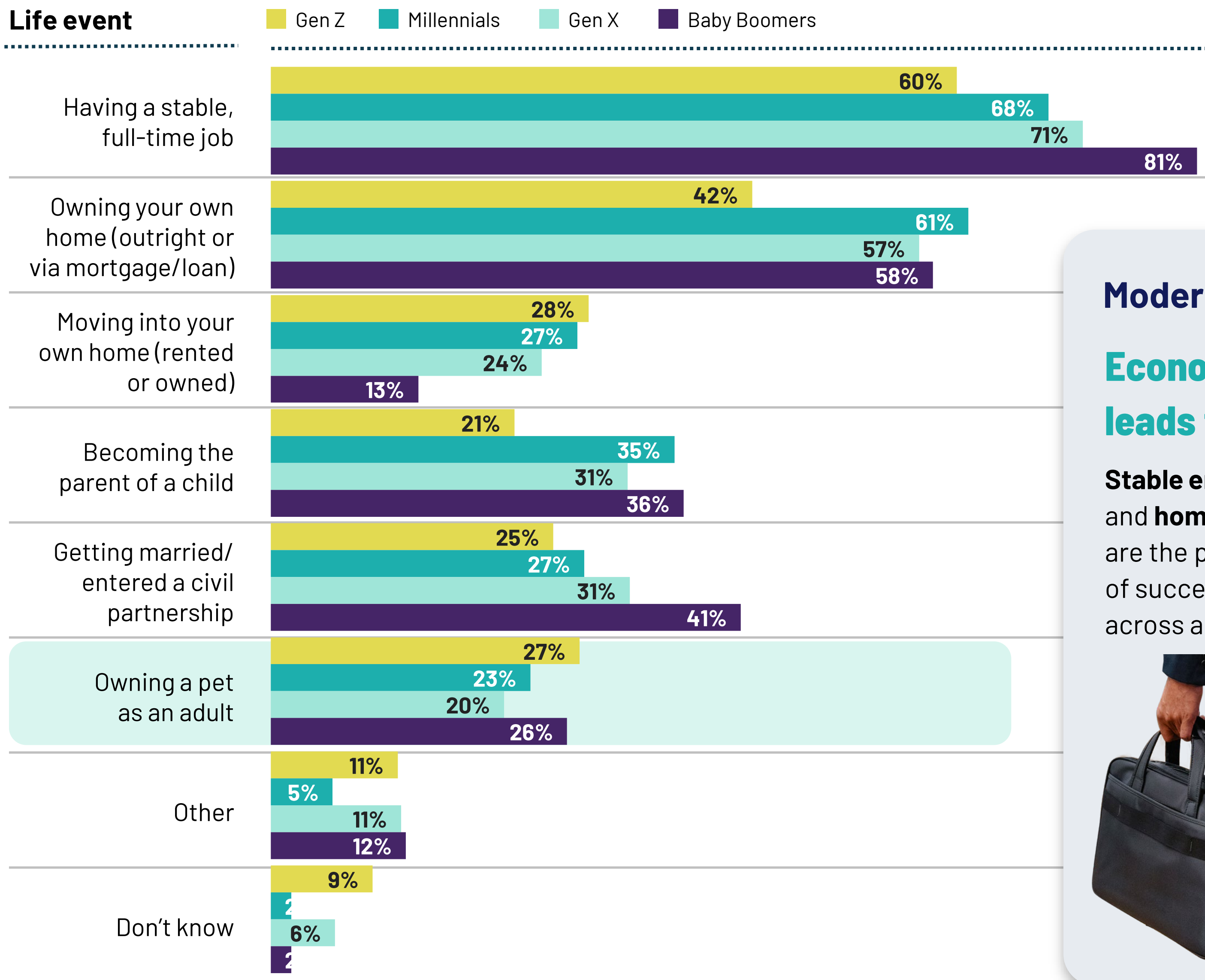
NEW HOUSEHOLDS, NEW OPPORTUNITIES

For Thai Gen Z, success is increasingly defined by personal stability rather than traditional life stages. While having a stable full-time job remains the leading aspiration, home ownership and starting a family are less important than they are for older generations.

Which, if any, of the following would you say are important signs of living a successful life these days? (select all that apply)

(% selecting)

Base: 22,693 online adults under the age of 75 across 30 countries, interviewed 20 February and 6 March 2026.



Modern Life Milestones

Economic security leads the way

Stable employment (68%) and **home ownership (54%)** are the primary markers of success among Thais across all generations.

** Gen Z: born 1996–2012; Millennials: 1980–1995; Gen X: 1966–1979; Baby Boomers: 1945–1965*

Pets Are Becoming Family - Reshaping Household Spending

As households evolve, Thai consumers are investing more in their pets' health, nutrition and everyday wellbeing. The pet humanization trend generates **average spending of 41,100 baht per animal per year** on food, health and toys.

Changing Households Are Driving Pet Ownership

Rising single-person households (30% of all households) and urban lifestyles are increasing pet ownership, creating new demand beyond basic care.

43% of Thais own one pet

- Cats lead new pet ownership - well suited to condo and urban living.
- Growing demand for personalized, breed - specific and life-stage nutrition.

Pets Are Increasingly Viewed as Family

Emotional attachment is transforming purchasing behaviour toward treating pets like family.

58%

of Thai pet owners consider their pets to be family members.

31%

go further, viewing their pets as babies or children.

Spending Extends Far Beyond Pet Food

Owners increasingly prioritize quality, health and convenience - expanding the pet economy into new categories.

CONSUMERS ALSO INCREASINGLY SEEK

- Premium & functional pet food
- Health-specific nutrition & supplements
- Pet-safe household cleaners & laundry care
- Odor-control & hygiene products

Key Takeaway: The pet economy is no longer limited to pet food - it's creating opportunities across health, home care, housing, and lifestyle categories.

Source: Bangkok Post, TTB Analytics, TGM Research

Brands getting it right

Kaniva has positioned itself around premium nutrition and scientifically formulated recipes tailored to different life stages and health needs. By emphasizing quality ingredients and pet wellbeing, the brand reflects the growing tendency for Thai consumers to treat pets as family members and invest in products that support their long-term health.

NEO's LovliTails has launched a full pet-care ecosystem built around a "Pet-Centric Natural Solution" concept. The range spans a Natural & Mild Shampoo, a Stain & Stink Odor Eliminator Spray, Natural Care Pet Wipes, and a food-grade Toy & Dish Washer and Floor Cleaner formulated to be gentle on paws. LovliTails offers pet parents a premium, one-stop solution that's as safe for pets as it is pleasant for owners.

Kao's Magiclean has extended its trusted household cleaning range to be pet-safe, letting existing customers care for their pets without buying anything new. The Magiclean Floor Cleaner Pet Loved range comes in a dedicated scent formulated to not disturb pets while cleaning, while still lifting accumulated pet stains and neutralizing odors in animal-raising areas - embedding pet-conscious formulation into everyday essentials already found in most Thai homes

Two Generations. One Opportunity: Win Differently.

Gen X and Gen Z together drive THB 7.6 trillion in spending power — but they place their trust in almost opposite places. Brands need to speak both languages, not pick one.

GEN X

Wealthy but anxious: brands earn loyalty through proof, not promotion.

- **Lead with evidence.** Gen X self-directs on health and holds back on money - credentials, data and transparency will move them further than an ad claim.
- **Design for prevention.** Preventive health, functional nutrition and solutions that help consumers stay ahead of future risks create more value than treating problems after they arise.
- **Make security visible.** Visible fraud protection and human support alongside AI convert financial anxiety into long-term loyalty.

GEN Z

Discovery beats advertising: earn a place in the feed before the basket.

- **Show up in the scroll.** Creator content and short-form video reach this generation earlier than search or paid media ever will.
- **Sell identity, not specs.** Brands that align with lifestyle, values and self-expression justify a premium.
- **Deliver more than the product.** Functional benefits, personalization and transparent value turn everyday purchases into lifestyle choices worth paying for.

The real opportunity sits between them. Purchase decisions in Thai households increasingly cross generations - Gen X funds it, Gen Z finds it. Brands with one flexible narrative, credible to the wallet and native to the feed, can own both ends of the next decade of growth.

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