Voice of the Consumer Survey 2025 – Thailand Snapshot

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Consumer profile

521 Thai respondents

49% are male

51% are female

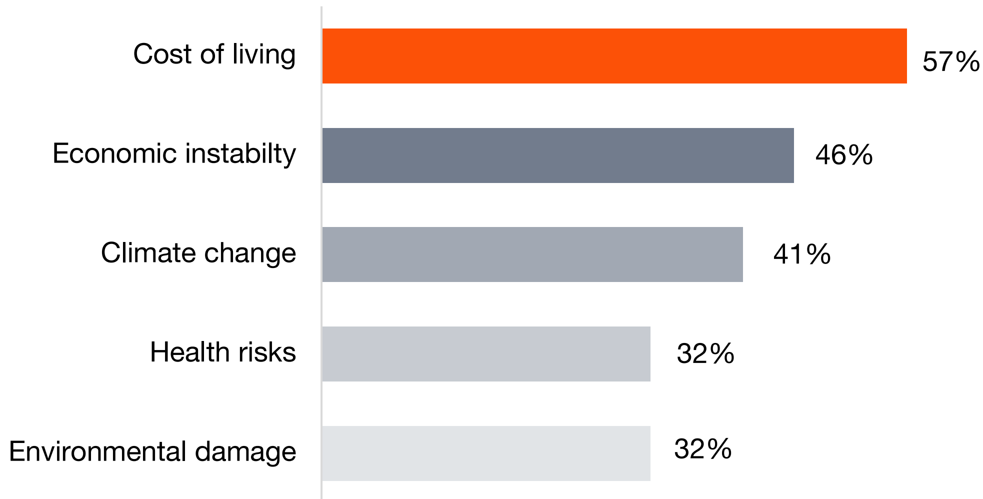
41% Generation X	29% Millennials	23% Gen Z	6% Boomers
54% Employed full-time	32% Self-employed	12% Not working	3% Employed part-time

The consumer mindset

PwC's 'Value in motion' research forecasts that by 2035, the global food industry is set to transform into a more integrated and innovation-led ecosystem, contributing a baseline gross value added of around USD9.88tn, with the potential to reach USD10.35tn.

At the core of this reconfiguration is the question of how we feed a world that's increasingly focused on health, sustainability and technology. Thailand is aligned with these global trends. As expectations continue to shift, businesses looking to capitalise on new opportunities in the 'how we feed' domain must gain a thorough understanding of Thai consumer preferences and behavioural changes.

Top five threats and risks facing Thai consumers



57%

believe the cost of living could have the greatest impact on their country in the next 12 months, followed by economic instability (46%) and climate change (41%).

These concerns mirror global trends, with 58% worried about the cost of living, 46% concerned about economic instability and 31% focused on climate change.

Financial security

Although most individuals report feeling financially secure, a significant proportion are either just managing or experiencing financial strain.

53%

say they are financially secure (compared to 46% globally), while 36% are coping and 8% identify as financially insecure.

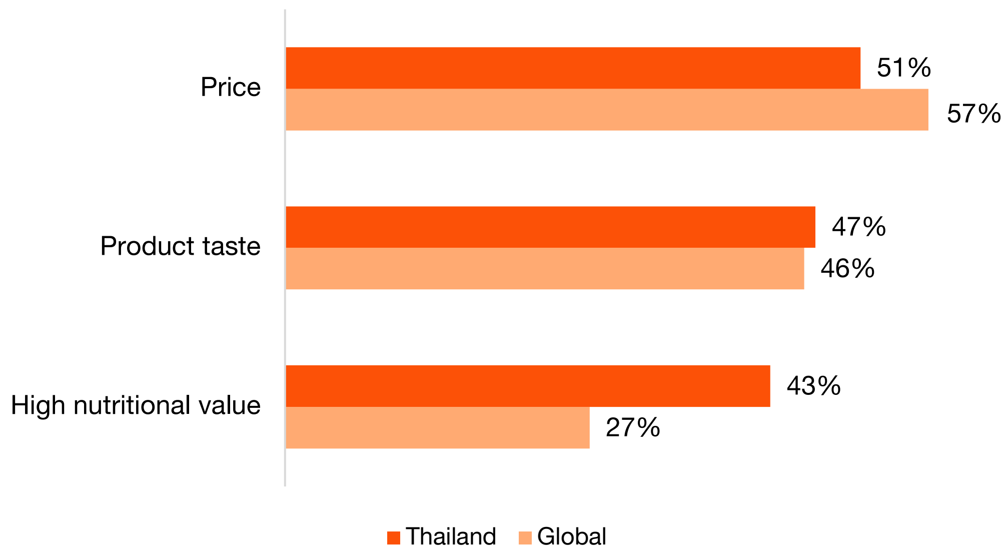
Food safety is a major concern

Food safety remains a critical issue, with heightened concern regarding the risks associated with pesticides, additives, and ultra processed foods.

66% are highly worried about the risks of pesticides in food, while 55% are concerned with levels of additives or preservatives and 51% highlight health risks from ultra processed foods.

These findings show that when it comes to buying food, Thai consumers aren't just looking at the price tag, whether low or high. They're also thinking carefully about food safety and quality.

Key factors in food choices for Thai consumers



51% consider price as the top factor when it comes to choosing food items to buy (compared to 57% globally), followed by the taste of the products (47%) and high nutritional value (43%).

Traditional vs non-traditional retailers

When asked about their grocery shopping preferences, 99% of Thai consumers reported using traditional retailers such as supermarkets, local convenience stores, or small neighbourhood shops.

99%

of Thai consumers use traditional retailers

Supermarkets
Local/convenience stores
Warehouses/wholesalers
Discount retailers
Specialty food retailers
Farmers' markets

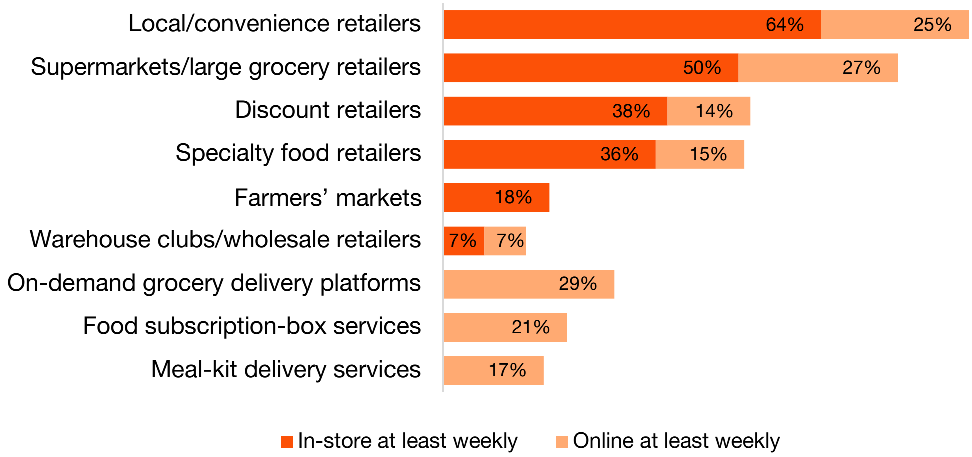
54%

of Thai consumers use non-traditional retailers

Food subscription box services
On-demand grocery delivery platforms
Meal-kit delivery services

At the same time, 54% have embraced modern retail services, including online ordering platforms and subscription meal delivery services. While Thai consumers are embracing the digital age, they remain deeply in touch with their traditional shopping habits.

Grocery shopping frequency by channel: in-store and online



When it comes to frequency in buying household goods, Thai consumers still prefer the familiarity of local retail stores, with 64% choosing to shop there. This is followed by supermarkets, attracting 50% of shoppers. These locations continue to serve as the go-to spots for weekly shopping. But let's not overlook the rise of online shopping.

With its speed and convenience, it's quickly winning hearts–especially in fast-paced urban lifestyle. In Thailand, 29% of consumers opt for on-demand grocery platforms weekly, notably surpassing global average of 15%.

Brand switching

51%

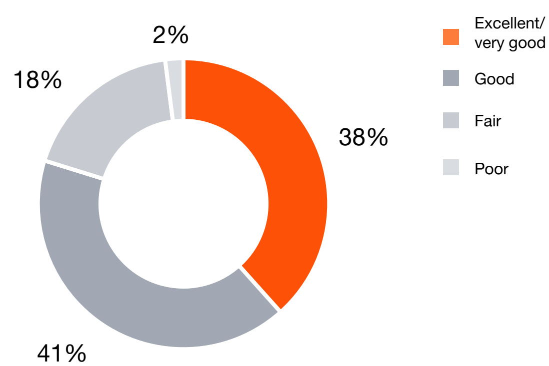
cite better value for money as a primary factor for switching from their usual food brand to another, which aligns with 51% of global consumers.

Price isn't everything. In fact, 43% of Thai consumers say better taste or perceived health benefits are key reasons to change food brands. If a food product tastes better or feels healthier, Thai consumers are open to exploring new options.

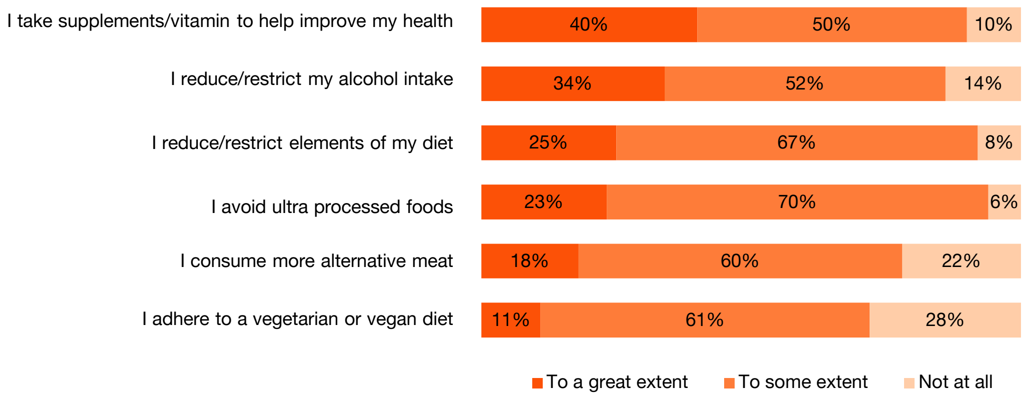
Health perceptions in Thailand

38%

report their general health as 'excellent or very good' (compared to 46% globally), with an additional 41% describing their health as 'good'. These responses are also reflected in Thai consumers' health-related dietary choices.



Health-related dietary choices



It's clear that health is a big motivator for consumers in Thailand when it comes to choosing what they eat. For example, about 40% say they regularly take supplements or vitamins to boost their health, which is higher than the global average of 30%.

Cutting back on alcohol is also a trend, with 86% saying they've reduced alcohol consumption 'to a great' or 'to some extent' when making health-related dietary choices (compared to 75% globally).

And when it comes to ultra processed foods, most are cautious: 70% say they try to avoid them at least 'to some extent'. That shows there's concern about additives and highly processed products among Thai consumers.

Convenience is another big factor. Some 78% buy prepared foods at least once a week, much more than the 38% global average. And when it comes to takeout, 70% order a meal to their home weekly or even more often—again, much higher than the 34% we see globally. Clearly, Thai consumers are busy and value both health and convenience in their food choices.

Food tech and GenAI adoption

More than half of Thai consumers are comfortable using generative AI (GenAI) for personalised nutrition and diet plans (53%), followed by meal planning and menu suggestions (47%) and integrating with smart kitchen appliances (43%).

	All generations	Gen Z (18-28 age group)	Millennials (29-44 age group)	Gen X (45-60 age group)
Creating personal training and exercise regimes, based on my vital statistics	54%	62%	58%	47%
Creating personalised nutrition and diet plans	53%	49%	57%	53%
Supporting meal planning and menu suggestions	47%	53%	50%	43%
Connecting with smart kitchen appliances to suggest meal ideas and recipes based on ingredients currently on-hand	43%	45%	44%	43%
Supporting grocery and food budgeting based on current habits	38%	39%	45%	33%
Providing predictive grocery shopping lists based on previous ordering/habits	34%	35%	35%	33%
Providing a medical diagnosis and/or treatment recommendations	29%	34%	28%	28%
None of the above	8%	6%	4%	10%

Younger Thai consumers are more comfortable using GenAI for health and food-related activities than older generations, though most people remain wary of relying on GenAI for medical diagnoses.

Thai consumers have also wholeheartedly embraced ‘health tech’. The majority (79%) use at least one healthcare app or wearable device, averaging three per person. Nearly all (98%) report these technologies have affected their routines, with 49% noting significant changes—well above the global average of 34%.

Climate and sustainability

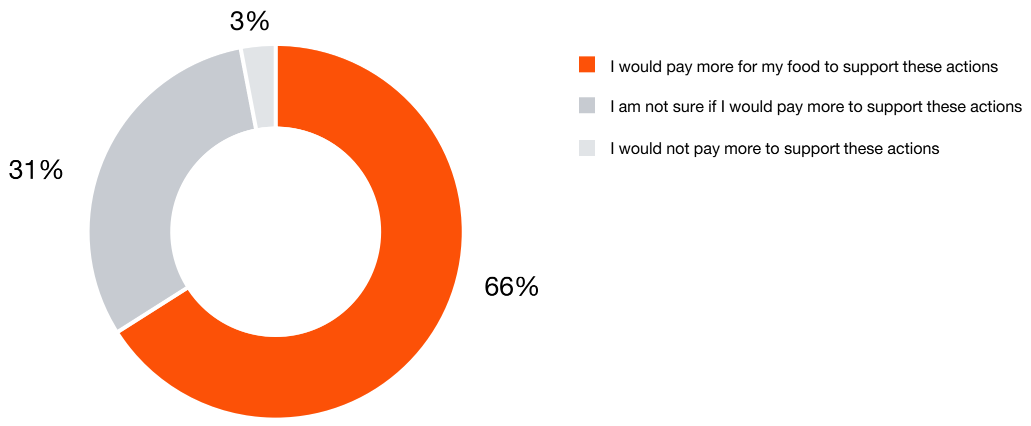
Consumer perspectives on climate change

92% of Thai respondents express concern about climate change, compared to the global average of 81%.

Some 44% worry about climate change daily, while 48% are concerned but do not consider it regularly. The most valued sustainability practices among Thai consumers include pesticide-free products (44%), minimal or environmentally friendly packaging (43%) and manufacturers supporting local environmental initiatives (41%).

Additionally, a majority of respondents indicate a willingness to accept higher food production costs to support environmental health measures. 66% are willing to pay more for food to facilitate land improvement actions, such as enhancing soil quality and biodiversity, which is higher than the global figure of 44%.

Most Thai consumers also seek to reduce food waste, with 70% intending to purchase only what is necessary, compared to 66% globally. Additionally, 46% opt for frozen foods, while 45% prefer buying loose produce.



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About the Voice of the Consumer Survey 2025

In January and February 2025, PwC surveyed 21,075 consumers across 28 countries and territories, including 521 from Thailand. The global survey explores a wide range of topics relating to consumer food consumption and trends, including grocery shopping and food choices, the future of health, emerging technology, and climate and sustainability issues.

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