

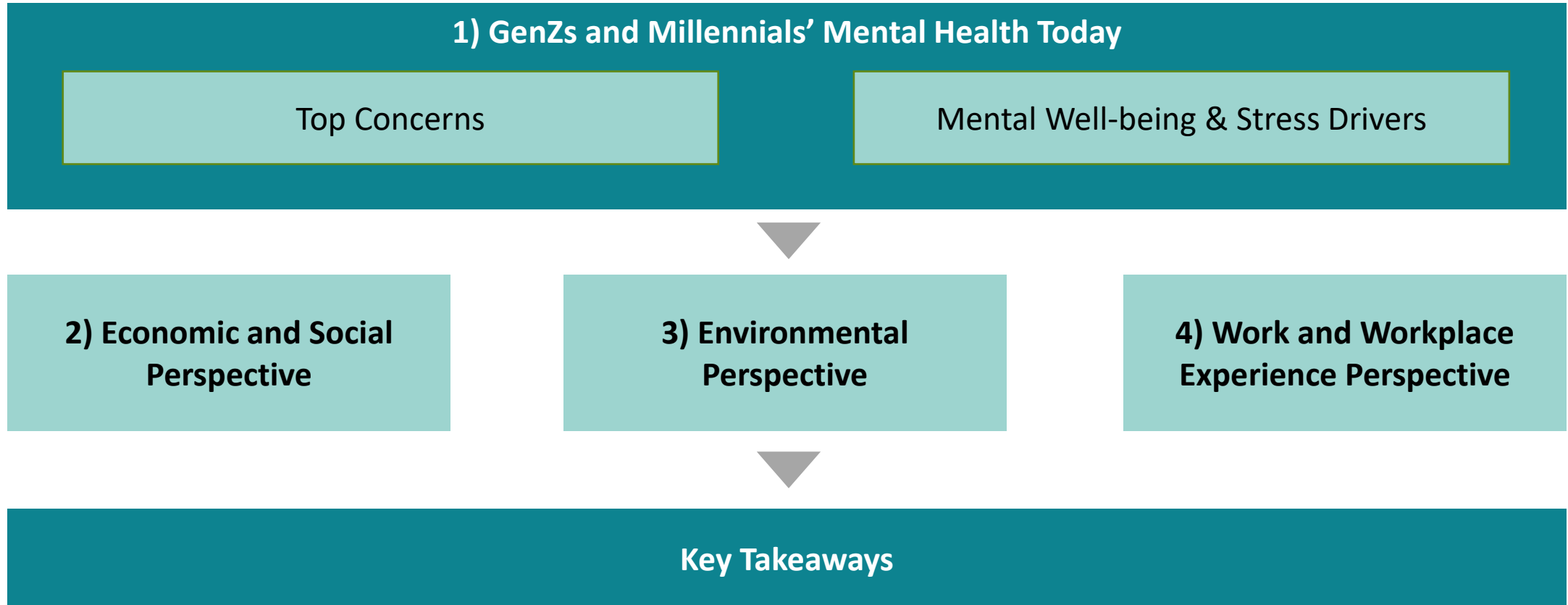


# Deloitte Global 2024 Gen Z and Millennial Survey

## Mental Well-being Matters

Thailand Perspective

**Mental Well-being Matters – Gen Z and Millennial Survey 2024 Thailand Perspective**

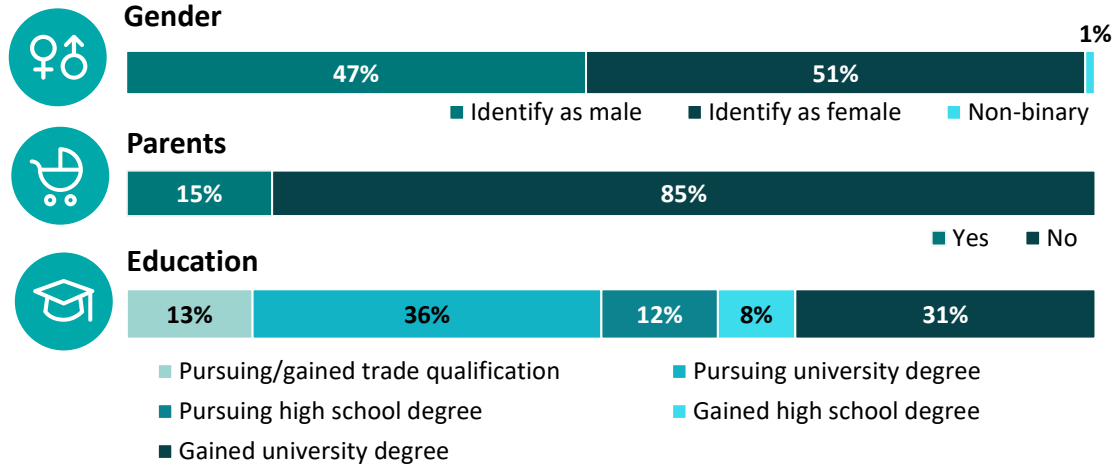


# Country profile: Thailand

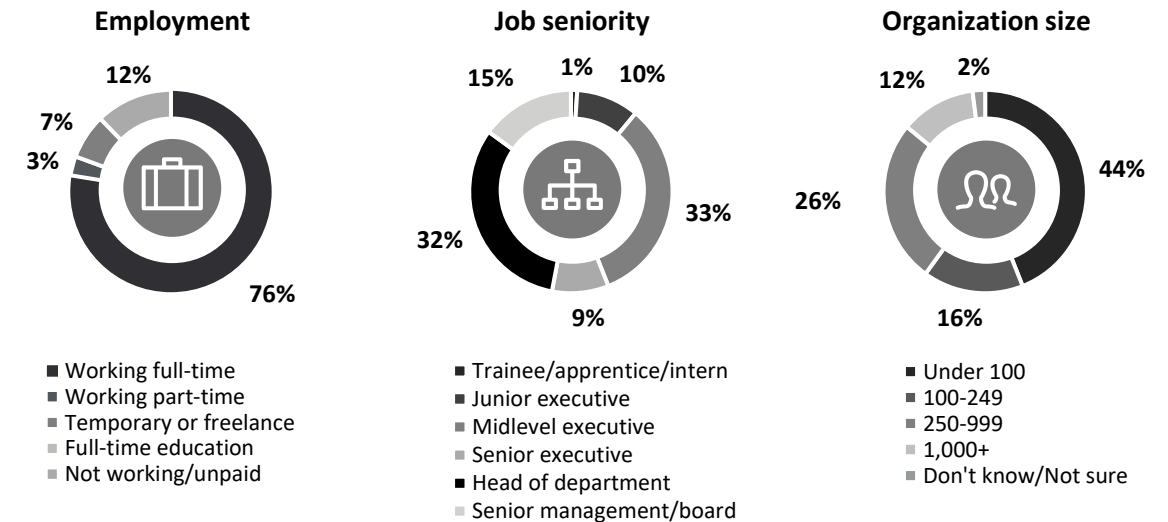
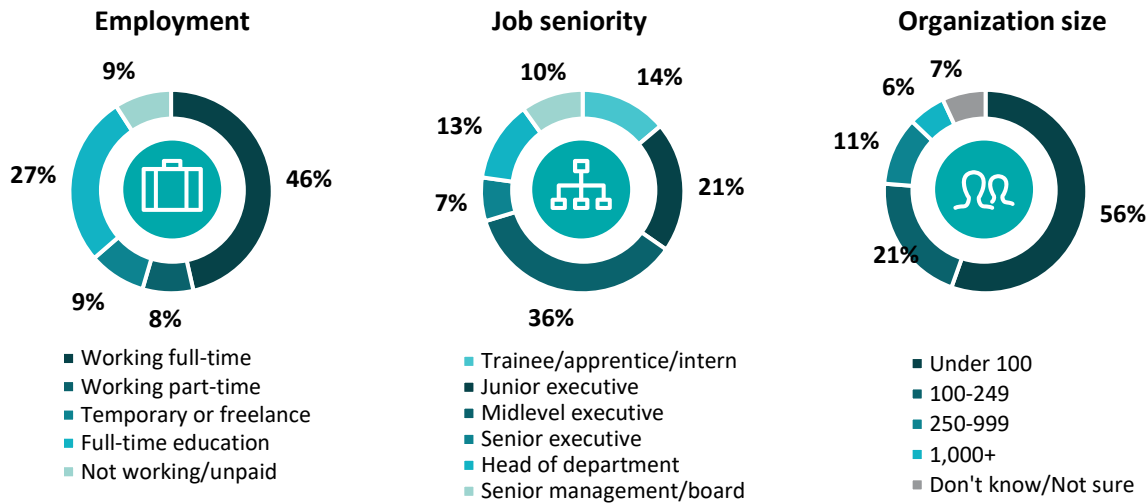
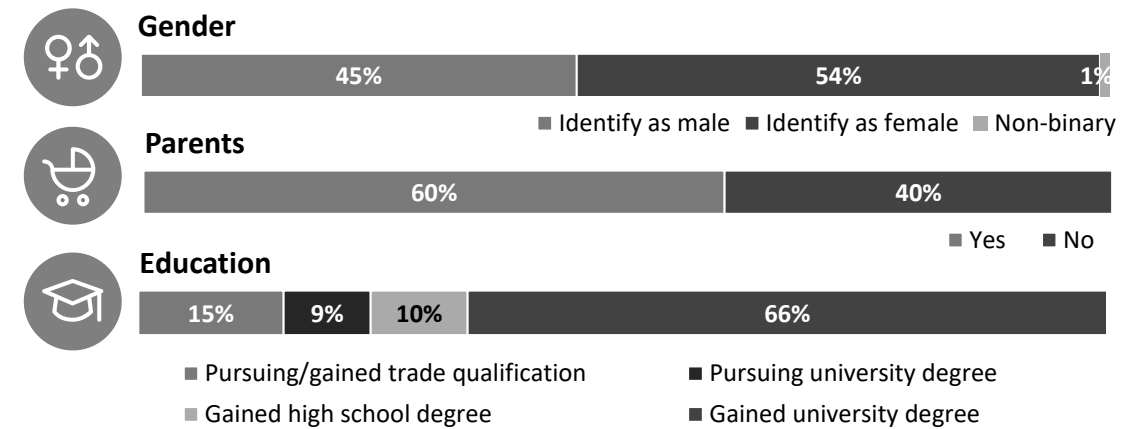
301 total respondents in Thailand: 201 Gen Zs and 100 millennials



## GEN Z PROFILE



## MILLENNIAL PROFILE



# 1) GenZs and Millennials Mental Health Today

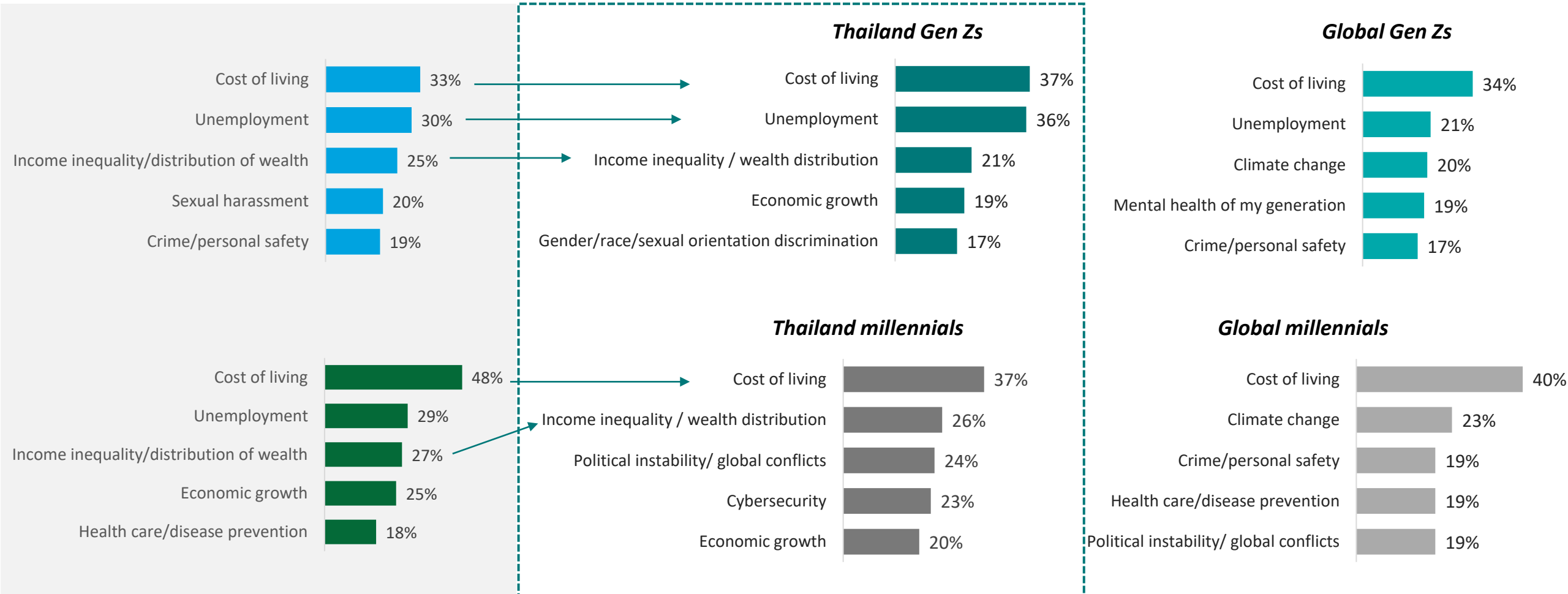
## Top Concerns and Stress Drivers

# Top concerns: Cost of living still be the global #1 concern, while social issues and economic growth are Thailand Gen Zs and Millennials common top concerns



2023

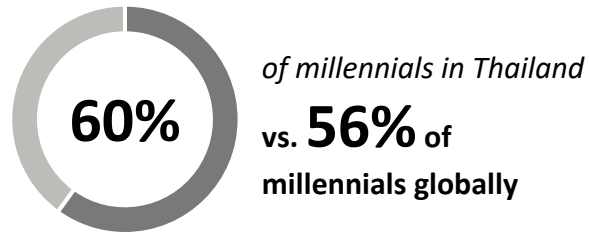
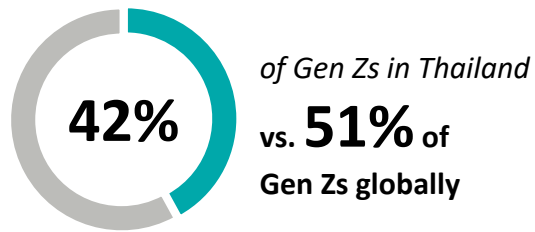
2024



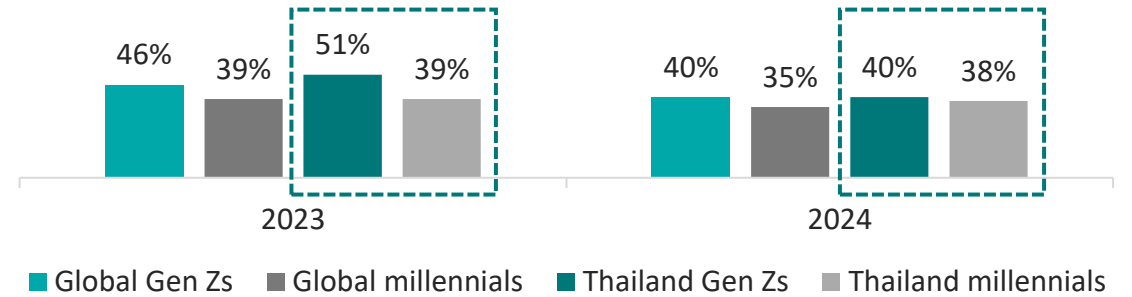
# Financial issues and jobs are driving stress that impact mental well-being



## Percentage of respondents who say their current, overall mental well-being is good or extremely good:

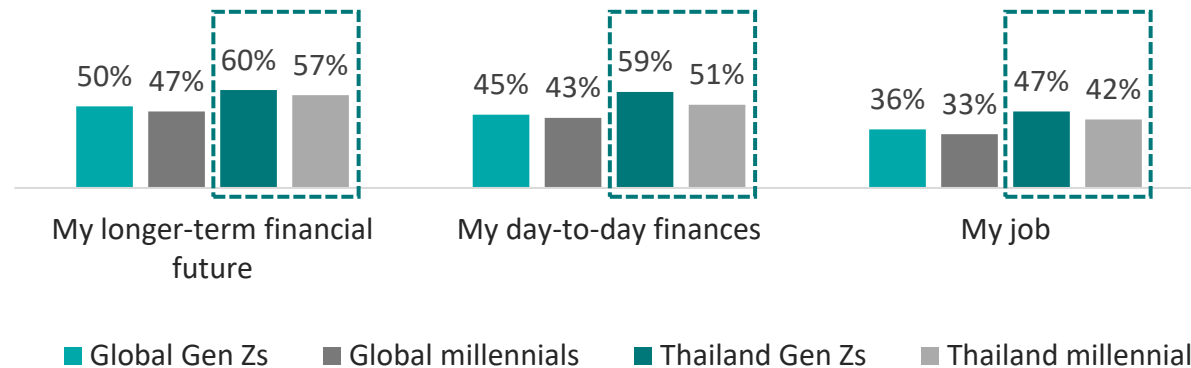


## Percentage of respondents who say they feel anxious or stressed all or most of the time:



## Top three factors contributing a lot to their feelings of anxiety or stress:

*\*asked only of those who feel anxious or stressed*



## 2) Economic and Social Perspective

# Economic Financial and Social outlook: A little less optimistic comparing to last year yet having a strong feeling of agency to drive change on societal challenges

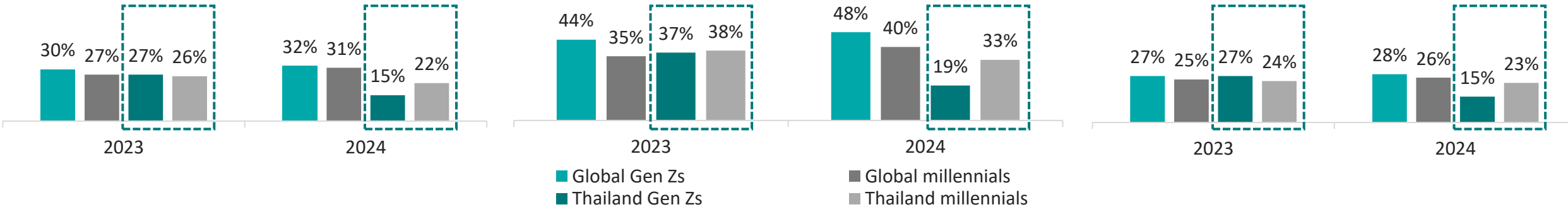


## Percentage of respondents who expect the following to improve over the next 12 months:

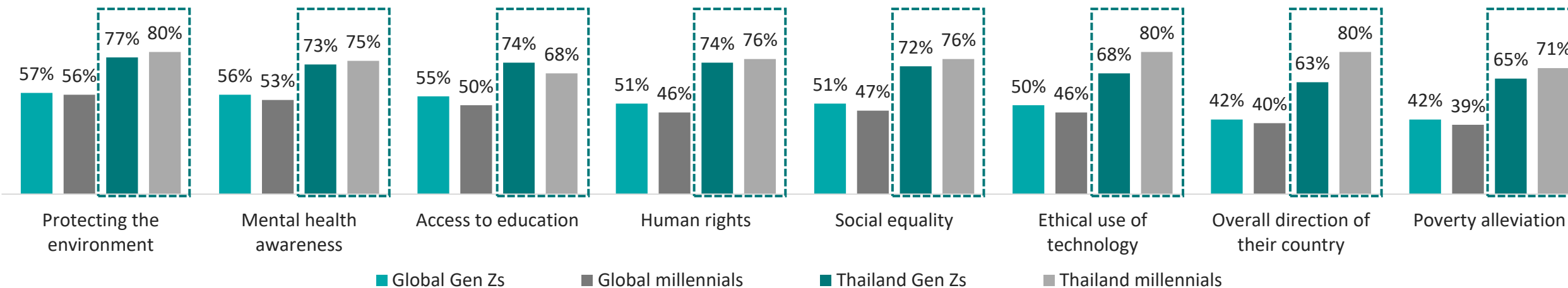
Overall economic situation

Their personal financial situation

Overall social/political situation



## Percentage of respondents who feel they have moderate or significant influence over the following societal issues:

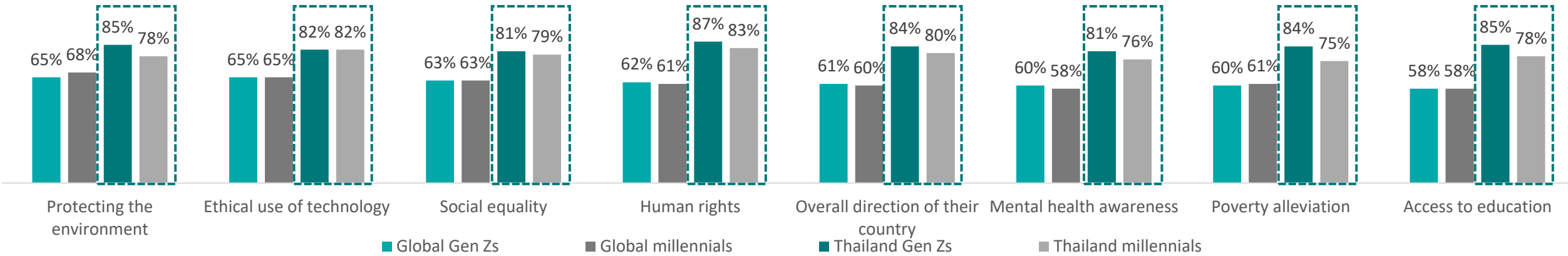




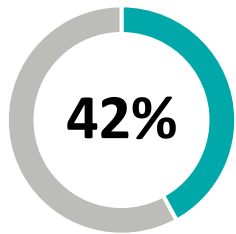
# Business and societal impact: A big gap between what Gen Zs and millennials feel business is capable of and what it is delivering to influence societal challenges



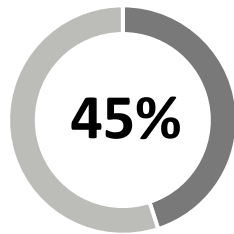
Percentage of respondents who think that business has a moderate or significant influence over the following societal issues:



Percentage of respondents who believe that business is having a fairly/very positive impact on the wider society in which they operate:

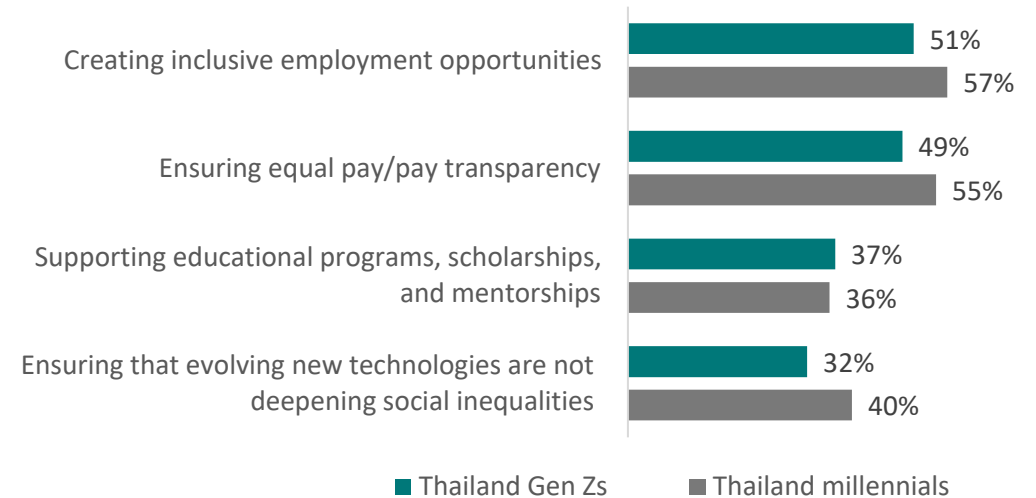


of Gen Zs in Thailand vs. **49%** of Gen Zs globally



of millennials in Thailand vs. **47%** of millennials globally

Percentage of respondents in Thailand who think businesses should play a role in addressing social inequality in the following areas:



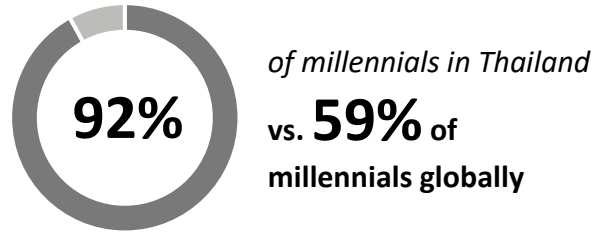
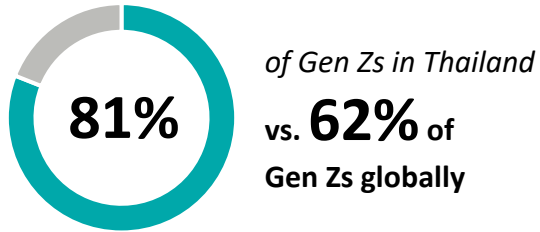
### 3) Environmental Perspective

# Environmental sustainability is everyone's responsibility

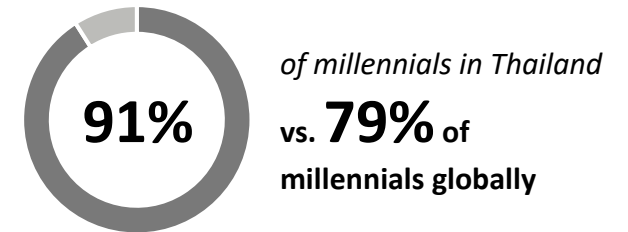
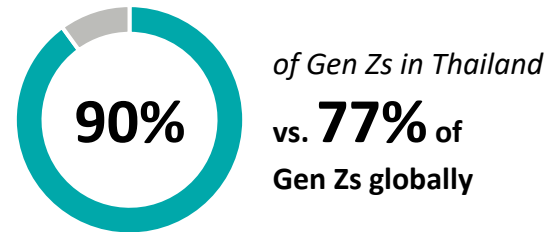


## Percentage of respondents selecting agree or strongly agree to the following statements:

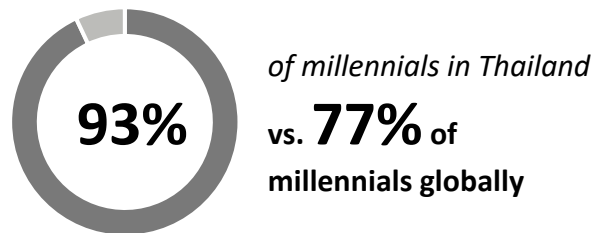
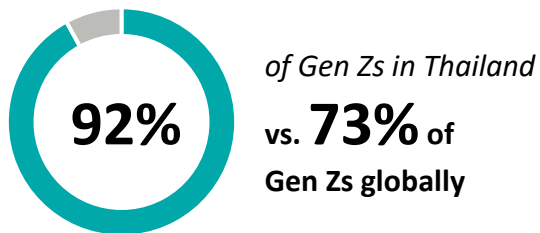
*In the last month, I have felt worried or anxious about climate change*



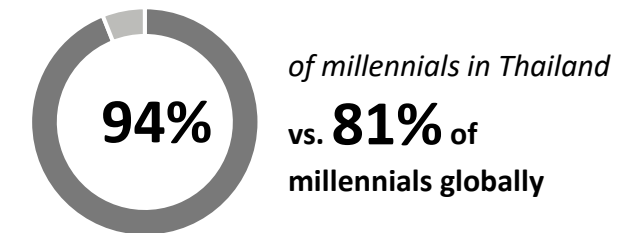
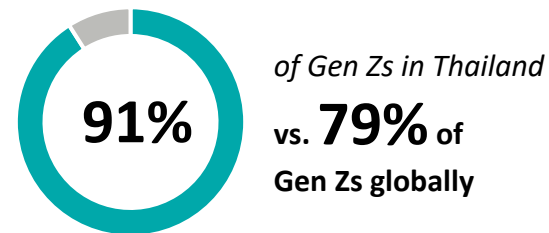
*Governments should play a bigger role in pushing business to address climate change*



*I actively try to minimize my personal impact on the environment*



*Business could, and should, do more to enable consumers to make more sustainable purchasing decisions*

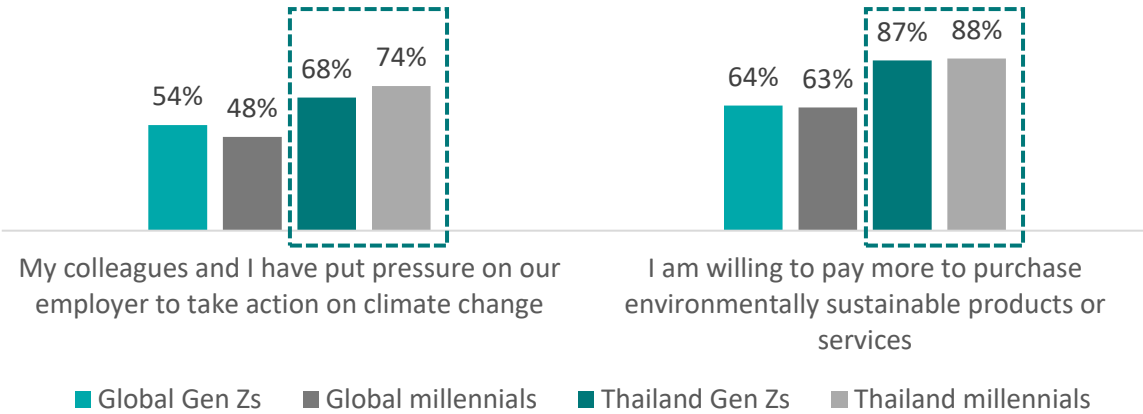


# Environmental sustainability continues to drive consumer behavior and career decisions

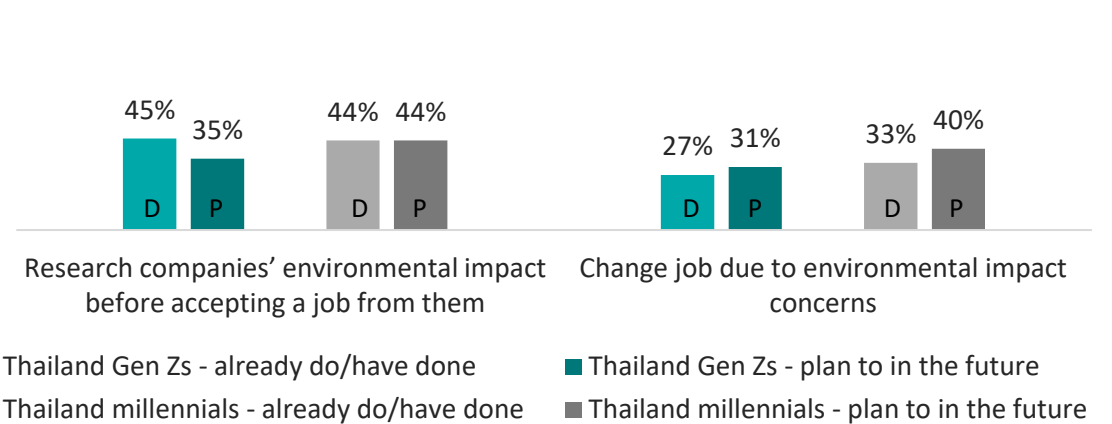


## Career decisions to pressure employers to take climate action

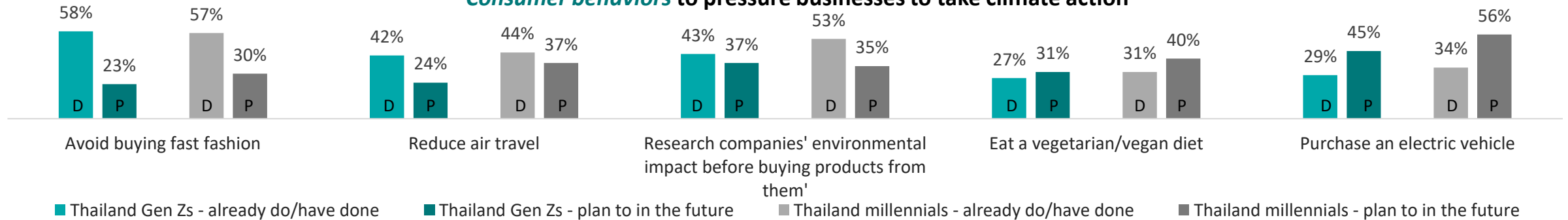
Respondents who agree/strongly agree with the following statements



Climate actions taken or planned



## Consumer behaviors to pressure businesses to take climate action



**20% of Gen Zs 26% of millennials in Thailand**

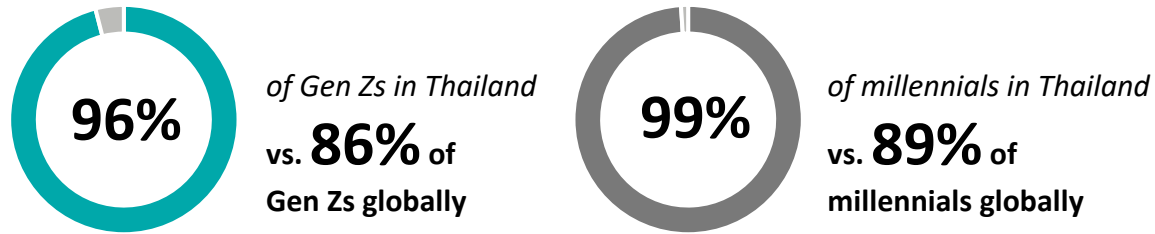
have stopped or lessened a relationship with a business because their products/services negatively impact the environment

## 4) Work and Workplace Experience Perspective

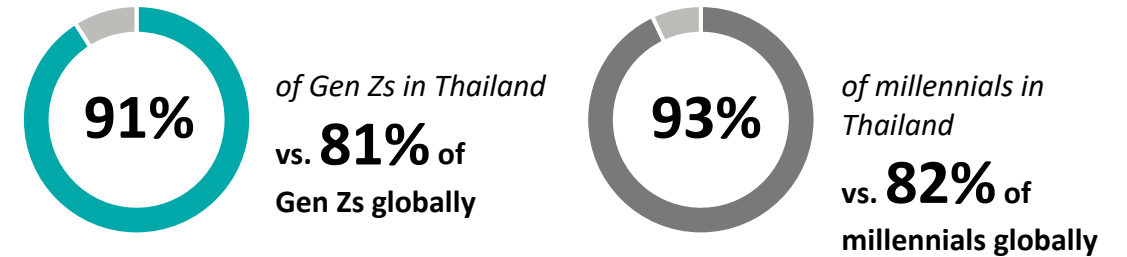


## Gen Zs and millennials want purpose-driven work, and they're not afraid to turn down work that doesn't align with their values

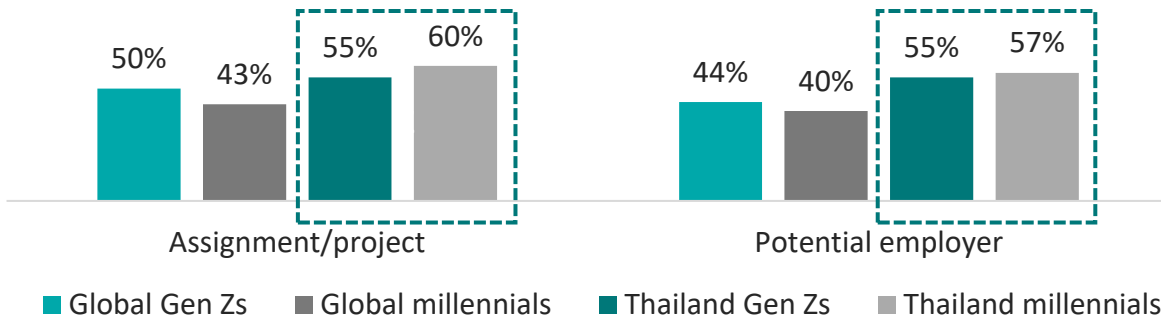
Percentage of respondents who said having a sense of purpose in their job is somewhat/very important for their job satisfaction and well-being:



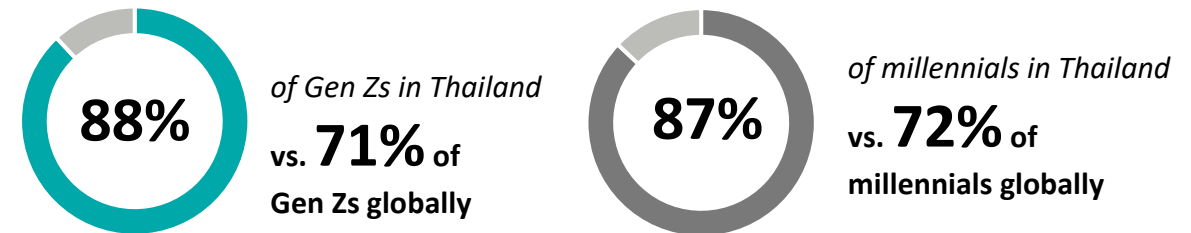
Percentage of respondents who said their current job gives them a sense of purpose (those saying yes - somewhat/yes - a lot):



Percentage of respondents who have rejected an assignment, or a potential employer based on their personal ethics/beliefs:



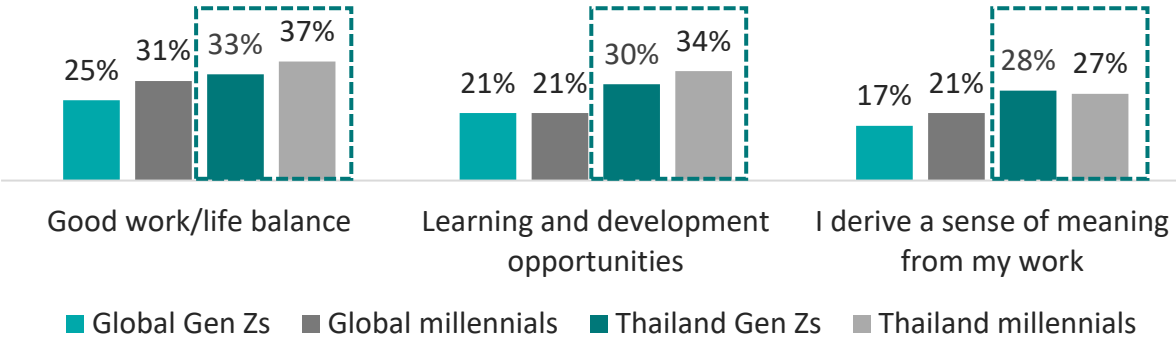
Percentage of respondents who said they are somewhat/very satisfied with the alignment of their current organization's values and purpose with their own:



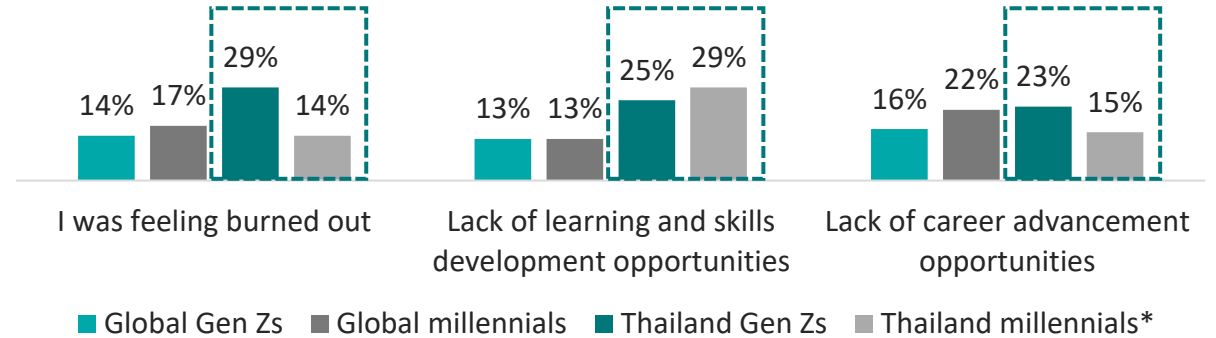
# What's driving career choices and top factors of work stress: Work/Life balance is a top priority impacting job satisfaction and feelings of anxiety



## Top three reasons why they chose to work for their organization:

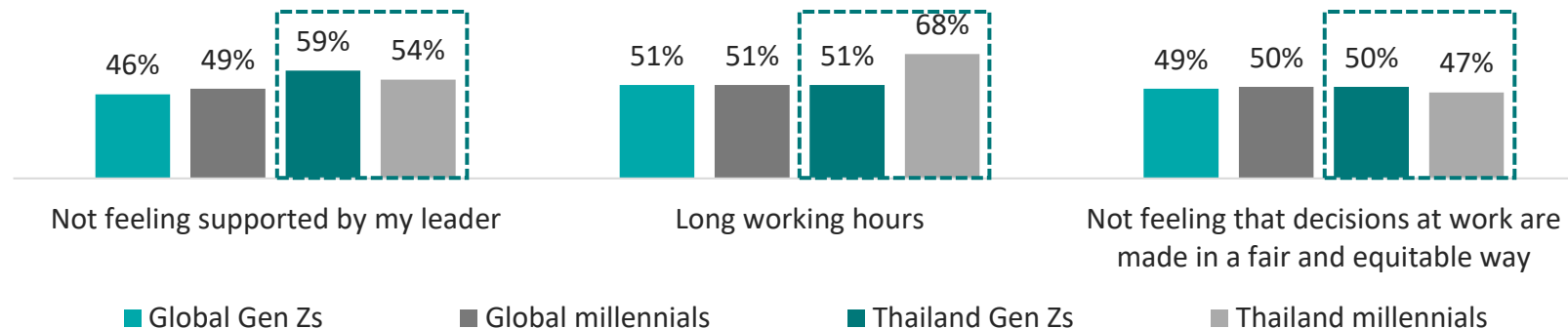


## Top three reasons why they left their previous organization:



\*Caution, small base (N=30)

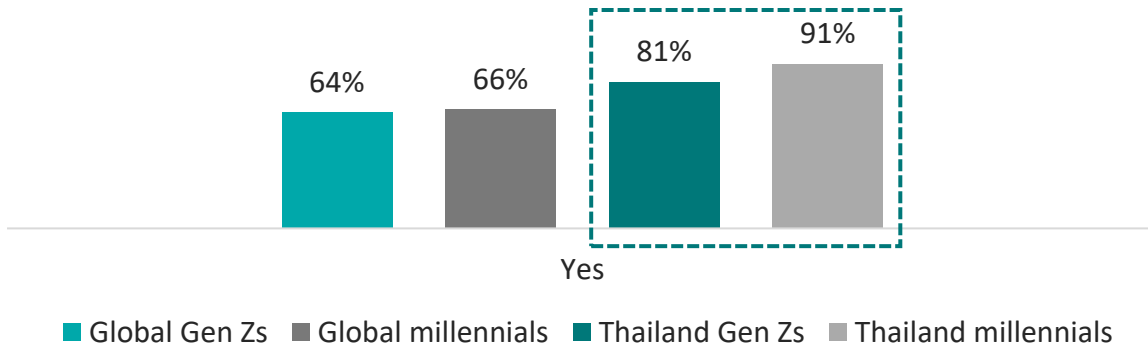
**47% of Gen Zs and 42% of millennials in Thailand said that their job is a factor contributing a lot to their feelings of anxiety or stress. These are the top three aspects of their job contributing a lot to their feelings of anxiety or stress:**



# The impact of return to office strategies: While return-to-office mandates have yielded mixed results, it's clear that Gen Zs and millennials continue to value flexible work, both in terms of when and where they work



## Percentage of respondents who said that their company recently implemented a return to office policy, and they are now required to be on-site on certain days or full time:



## Top three positive and negative impacts of return to office policies: (Thailand Gen Z respondents)

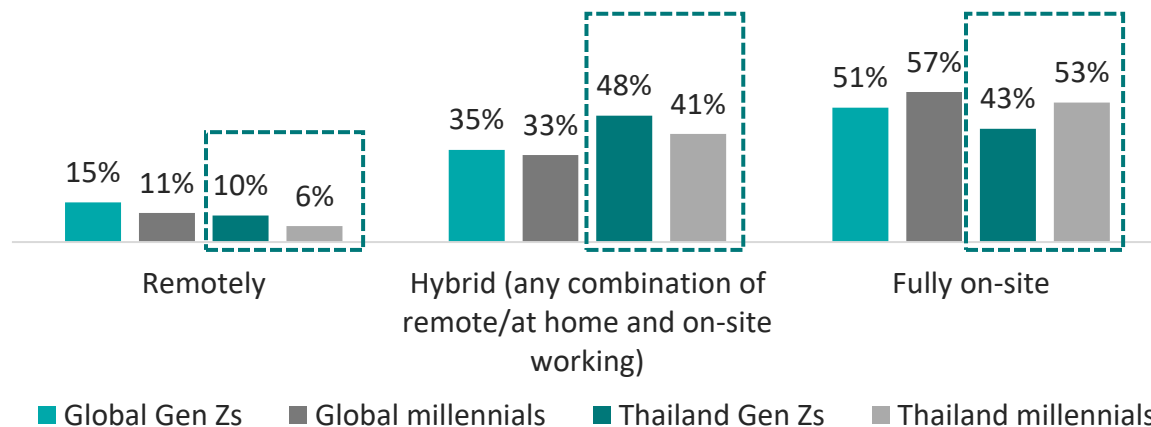
### Positive:

- I have noticed increased collaboration and social interaction with my work colleagues
- I have better routine and structure at work
- I feel more engaged and connected with my organization and colleagues

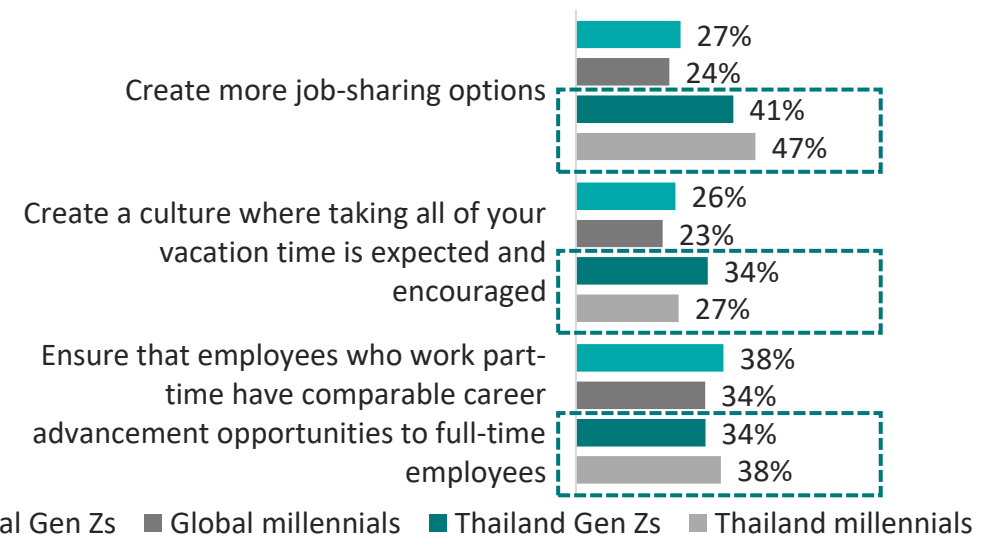
### Negative:

- My productivity has decreased (e.g., due to time spent commuting that I would have previously spent working)
- It has negatively impacted me in a financial sense (e.g., needing to pay for the cost of commuting, or additional care etc.)
- It has negatively impacted my mental wellbeing/increased my stress levels

## Their current way of working:



## In which of the following areas should organizations focus to help foster better work/life balance for their employees? - top three

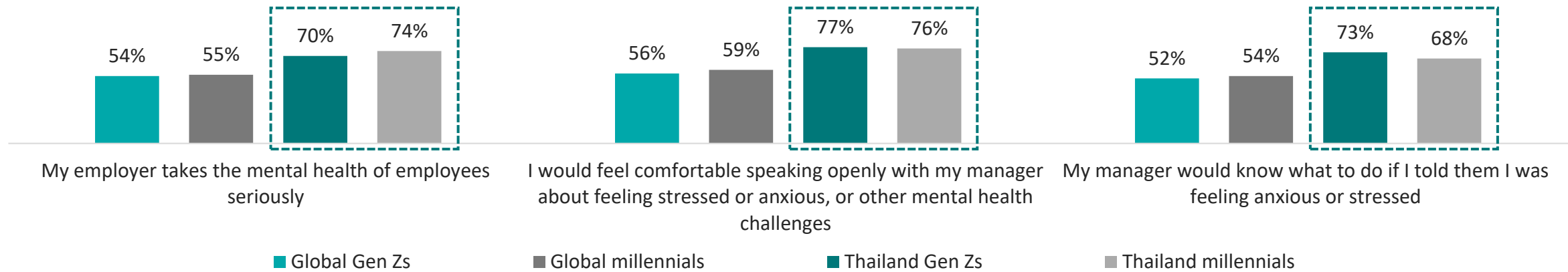




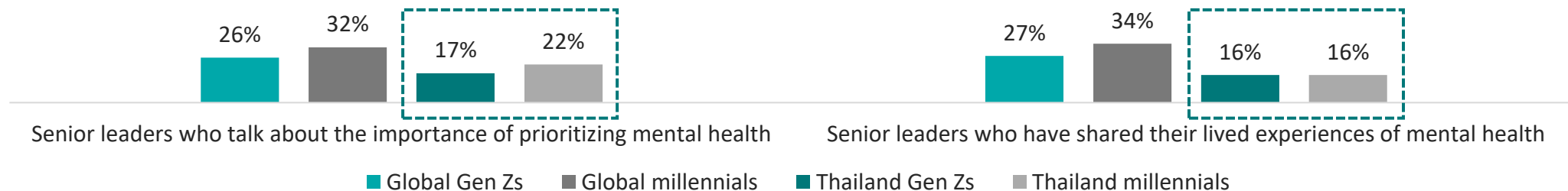
## Thai workplaces are doing well regarding the workplace mental health support comparing to global average



### Percentage of respondents who agree/strongly agree with the following statements related to workplace well-being/mental health:

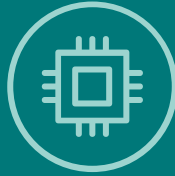


### Percentage of respondents who said they *do not* have the following support available where they work...



Additional: Gen AI at Work

# GenAI at work – engagement and understanding



## Top three emotions about GenAI in Thailand

Gen Zs

46% Excitement  
28% Surprise  
27% Trust

millennials

49% Excitement  
33% Surprise  
24% Trust

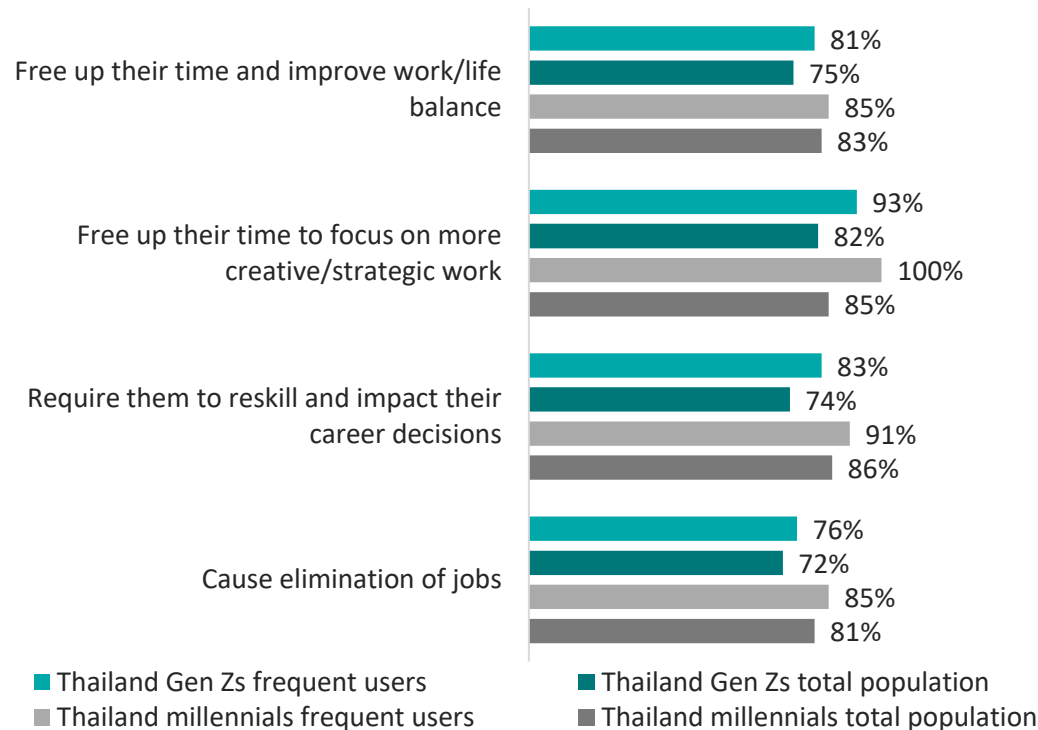


Percentage of respondents who agree/strongly agree that their employer is sufficiently training employees on the capabilities, benefits, and value of GenAI

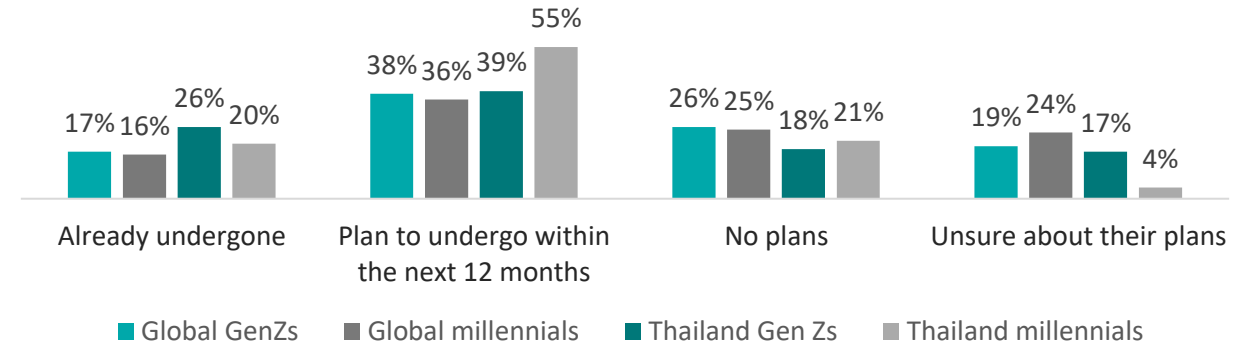
75%  
Gen Zs in Thailand

74%  
millennials in Thailand

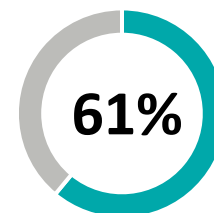
31% of Gen Zs and 38% of millennials in Thailand are frequent users of GenAI at work (said they use it all or most of the time). Percentage of respondents who agree/strongly agree that GenAI in the workplace will...



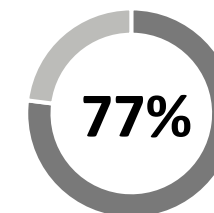
How respondents describe their engagement with GenAI training or upskilling as a part of their professional development:



Percentage of respondents who think GenAI will improve the way they work somewhat/a lot over the next 12 months



of Gen Zs in Thailand

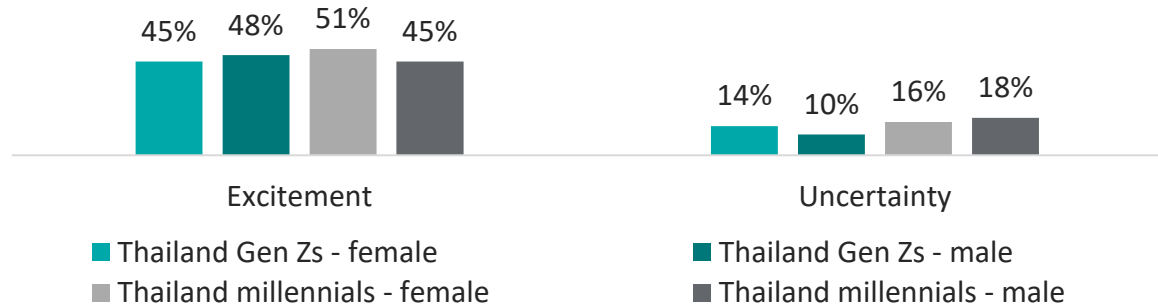


of millennials in Thailand

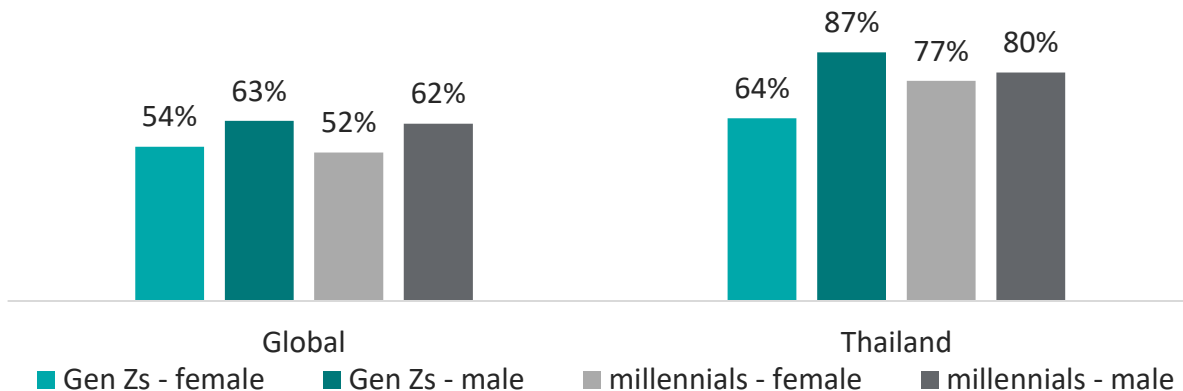
## GenAI at work – gender differences



### Percentage of respondents who said that GenAI makes them feel the following emotions:



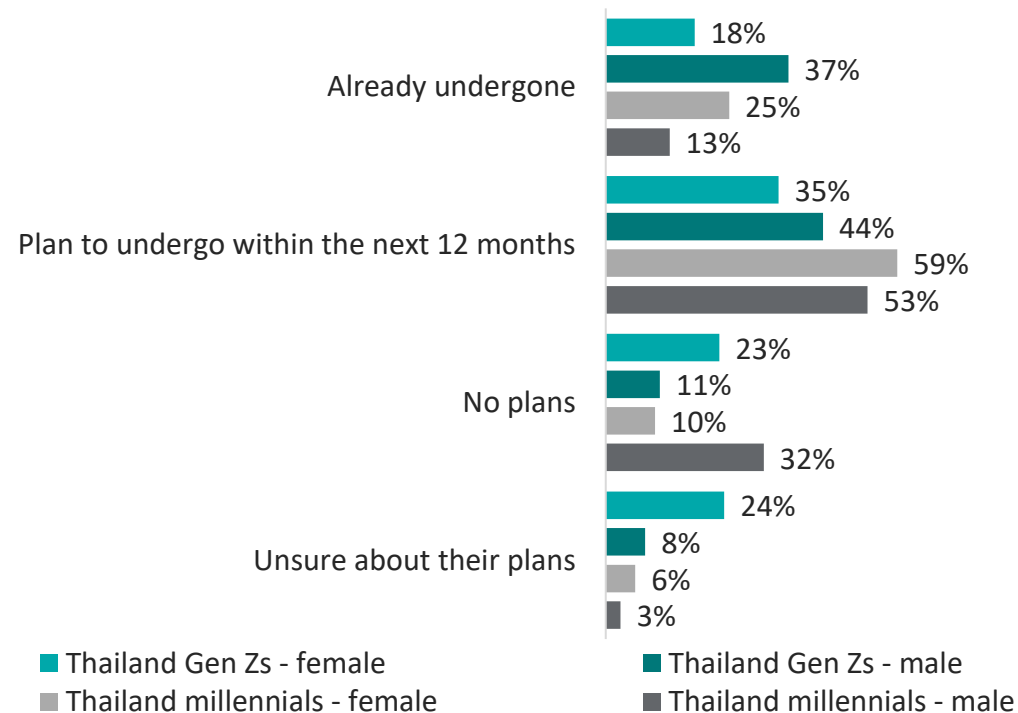
### Percentage of respondents who agree/strongly agree they feel comfortable working alongside GenAI systems and tools



*Globally, women are less likely to seek training around GenAI.*  
 Percentage of respondents in Thailand who have no plans to seek training:



### Percentage of respondents describing their engagement with GenAI training or upskilling as a part of their professional development:



## Key takeaway



**Stress levels continue to be very high among Gen Zs and millennials** - from financial concerns alongside job related factors. As workplace factors contribute to stress levels, employers must stay focused on supporting better workplace mental health by many means such as maintaining a visible focus on mental health from the top of the organization, fostering psychologically safe and trust-based workplace cultures, and considering alternative approaches to “how work gets done”.



**Meaningful work within purpose-driven organizations, work/life balance flexibility, learning and career opportunities influence workplace satisfaction.** Gen Zs and millennials demand a lot from their employers and from business more broadly, but what they are asking for is in fact what most employees in the workforce regardless of age likely want. It requires employers to constantly listen and adjust their strategies. Though it’s not easy to get every one of these things right, but those who do get it right will have a more satisfied, productive, engaged, and agile workforce who are better prepared to adapt to a transforming world.



**Environmental sustainability is driving career decisions and consumer behaviors.** Environmental sustainability remains a top concern for Gen Zs and millennials, and it is the top societal challenge which respondents feel businesses have the opportunity and necessary influence to drive change on. Gen Zs and millennials are pushing business to take action, through their career decisions and their consumer behaviors.

The following deck examines how **Thailand’s Gen Zs and millennials** stand out from their global counterparts on these key themes.



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