FutureTales LAB™

BY

MQDC
FOR ALL WELL-BEING

TRENDS SHAPING 2025

The future doesn't just arrive—it's shaped by the events and choices of the past. In this mini report, we set out to explore the trends that are likely to define 2025. But before we dive into what's ahead, it's worth taking a step back. After all, foresight isn't just about predicting the future; it's about understanding how we got here.

2024 was a year of profound shifts. From climate milestones and political upheavals to rapid technological advancements and escalating global tensions, the past year has set the stage for what's coming next. These changes aren't just headlines—they're catalysts for the opportunities and risks that lie ahead.

In the pages, we'll break down the key trends shaping the global and local landscape, giving you a clearer view of what's on the horizon. And because the future isn't fixed, we'll also be asking 'What if?' questions to challenge assumptions, spark curiosity, and help you think beyond the obvious.

Let's embark on this journey to understand the trends, so you can navigate 2025 with greater clarity and confidence.

LOOK BACK TO LOOK FORWARD

Global

March 2024
Global temperatures surpassed the 1.5°C pre-industrial threshold, reaching 1.58°C—an unprecedented milestone. This triggered extreme weather events such as heatwaves, floods, and wildfires.

April 2024
Iran launched a massive drone and missile attack on Israel on April 13, marking their most direct confrontation in decades and raising fears of regional war. Israel's swift retaliation and ensuing clashes with Hezbollah in Lebanon fueled ongoing instability.
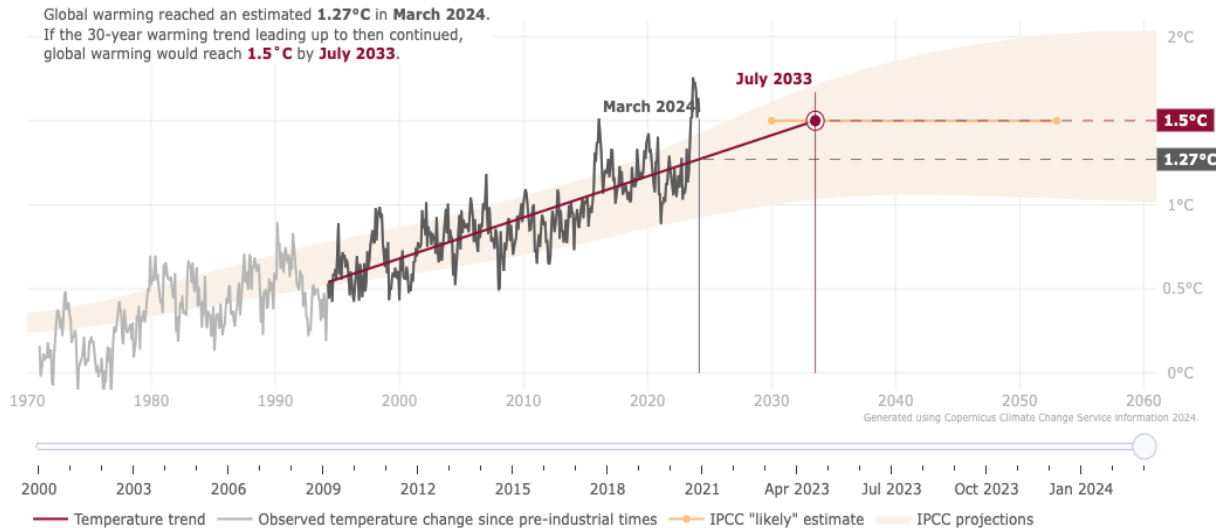
July 2024
The EU's AI Act, published on July 12, became the first comprehensive AI regulation, taking effect in August. AI breakthroughs earned Nobel Prizes for advances in neural networks and protein prediction, with the U.S. leading development and China in research output.

October 2024
Over 11,000 North Korean troops joined Russian forces in Ukraine, escalating the conflict globally. Reports confirmed several hundred casualties, mainly in Russia's Kursk Province. This deployment strengthens ties within the "Axis of Authoritarians" – Russia, China, North Korea, and Iran.

November 2024
Donald Trump was elected as President of the United States on November 5, defeating Kamala Harris and securing a return to the White House for a second, non-consecutive term.

Global warming reached an estimated **1.27°C** in **March 2024**. If the 30-year warming trend leading up to then continued, global warming would reach **1.5˚C** by **July 2033**.

Generated using Copernicus Climate Change Service information 2024.

Temperature trend — Observed temperature change since pre-industrial times — IPCC "likely" estimate — IPCC projections

LOOK BACK TO LOOK FORWARD

Thailand

March 2024
On March 27, Thailand became the first Southeast Asian country to legalize same-sex marriage, granting equal rights to LGBTQ+ couples. Widely supported by Parliament and the public, this landmark law positions Thailand as a regional leader in human rights.

April 2024
Thailand's economy rebounded in April as government incentives, including free visas, attracted a surge of international tourists. Consumer confidence hit a six-month high, driven by rising incomes and job growth. GDP growth is projected at 2.5%, strengthening Thailand's position in Southeast Asia.

July 2024
Thailand unveiled its Net-Zero Roadmap 2050, targeting carbon neutrality by 2050 and net-zero emissions by 2065. The plan focuses on expanding renewable energy to 50% of the energy mix and offers incentives to drive a green economy, positioning Thailand as a regional leader in sustainability.

August 2024
Paetongtarn Shinawatra was elected as Thailand's youngest and second female prime minister on August 16, marking a major political shift. Her election signals the return of the Shinawatra family's influence and brings promises of economic reforms and social welfare improvements.
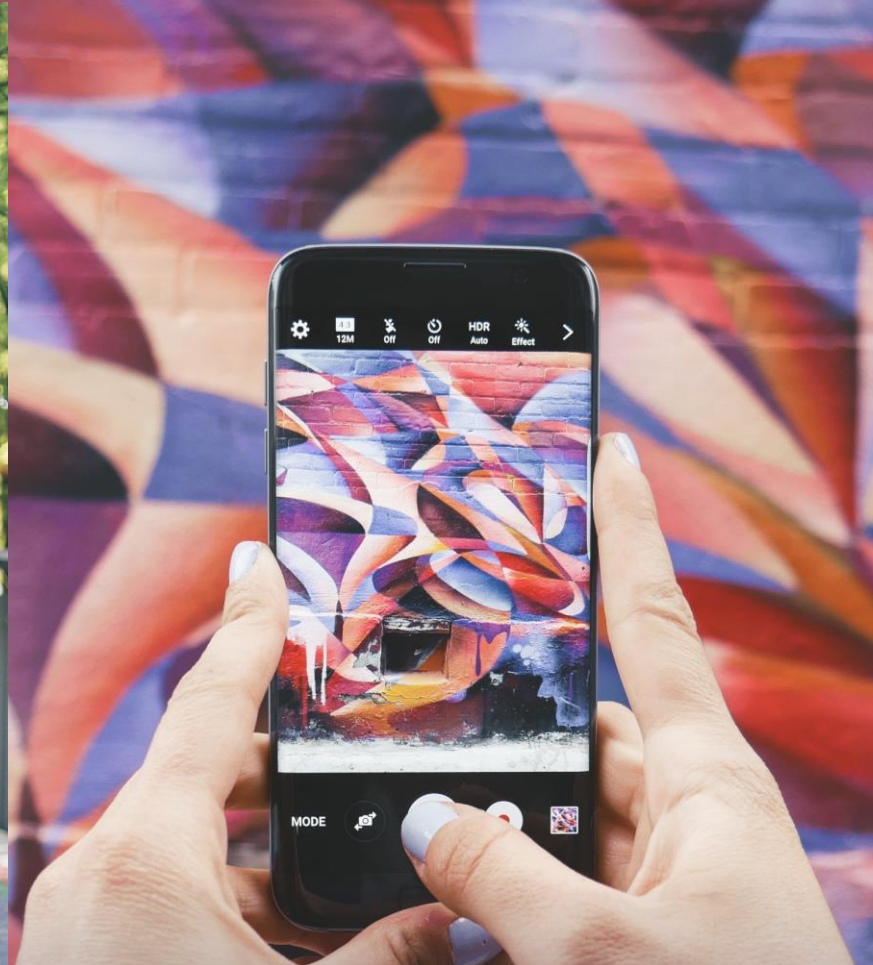
SOCIAL

SILVER REVOLUTION

By 2030, **1 in 6 people globally** will be aged 60 years or older, with the number of older adults rising from **1 billion in 2020 to 1.4 billion**.

REALITY REMIX

By 2028, it is anticipated that **70% of organizations** will implement strategies for seamless integration between digital and physical environments.

INTUITIVE WELLNESS

By 2025, the global mental health market is expected to reach **$95.03 billion**, with the **Asia Pacific** region identified as the fastest-growing market due to rising awareness of mental health issues.

SILVER REVOLUTION

31% of Thailand's population will be 60+ by 2040, presents both challenges and opportunities

- Thailand's ageing population is projected to increase significantly, with **21 million people aged 60 and older by 2040** i.e., **31.37%** of the total population

- As more people get older, Thailand will face important challenges in **healthcare, workforce sustainability,** and **the economy.** It's important to take proactive measures now to ensure future quality of like and economic stability.

WHAT IF?

What if **retirement was redefined, with people over 60 playing an active role in business, mentoring, and economic growth?**

What if **aging population policies attracted international retirees**, turning Thailand into a top destination for global senior living?

REALITY REMIX

Thailand is rapidly embracing a digital-first lifestyle, with 88% internet penetration and over 75% of users shopping online,

- With **63.21 million internet users** (88% of the population) and **97.81 million mobile connections**, digital life is now deeply connected to everyday activities for Thai population.

- Over **75% of internet users shop online**, and cashless payments are growing fast. Government initiatives like **Thailand 4.0** are making cities smarter and businesses more digital.

- As technology blends into daily life, people and businesses must adapt to stay relevant, focusing on **security, accessibility,** and **new opportunities.**

WHAT IF?

What if Thailand **leverages its strong mobile connectivity** to become a **global leader in digital-first services and experiences?**

What if **Thailand's digital economy unlocked new jobs that don't exist today**, creating an entirely new work landscape for the next generation?

Source: Statista, World Bank, NESDC, WHO, NSO

INTUITIVE WELLNESS

Mental health challenges are becoming a growing concern in Thailand, with rising cases of stress, depression, and a widening treatment gap

- Mental health issues affect **10 million people**, but only **2 million** receive treatment. Stress and depression rates are rising, with **15.5%** experiencing high stress and **17.2%** at risk of depression. Suicide attempts have reached **31,402 cases**, and the country has only **1.28 psychiatrists per 100,000 people**, far below the global standard.

- The need for mental health services is expected to grow by **30%** in the coming years. Efforts such as the **National Mental Health Strategy** are working to expand access, reduce stigma, and promote mental well-being at work and in schools

- Mental health challenges also **have** an economic impact, affecting productivity and social stability. Addressing these issues could lead to a healthier, more productive society.
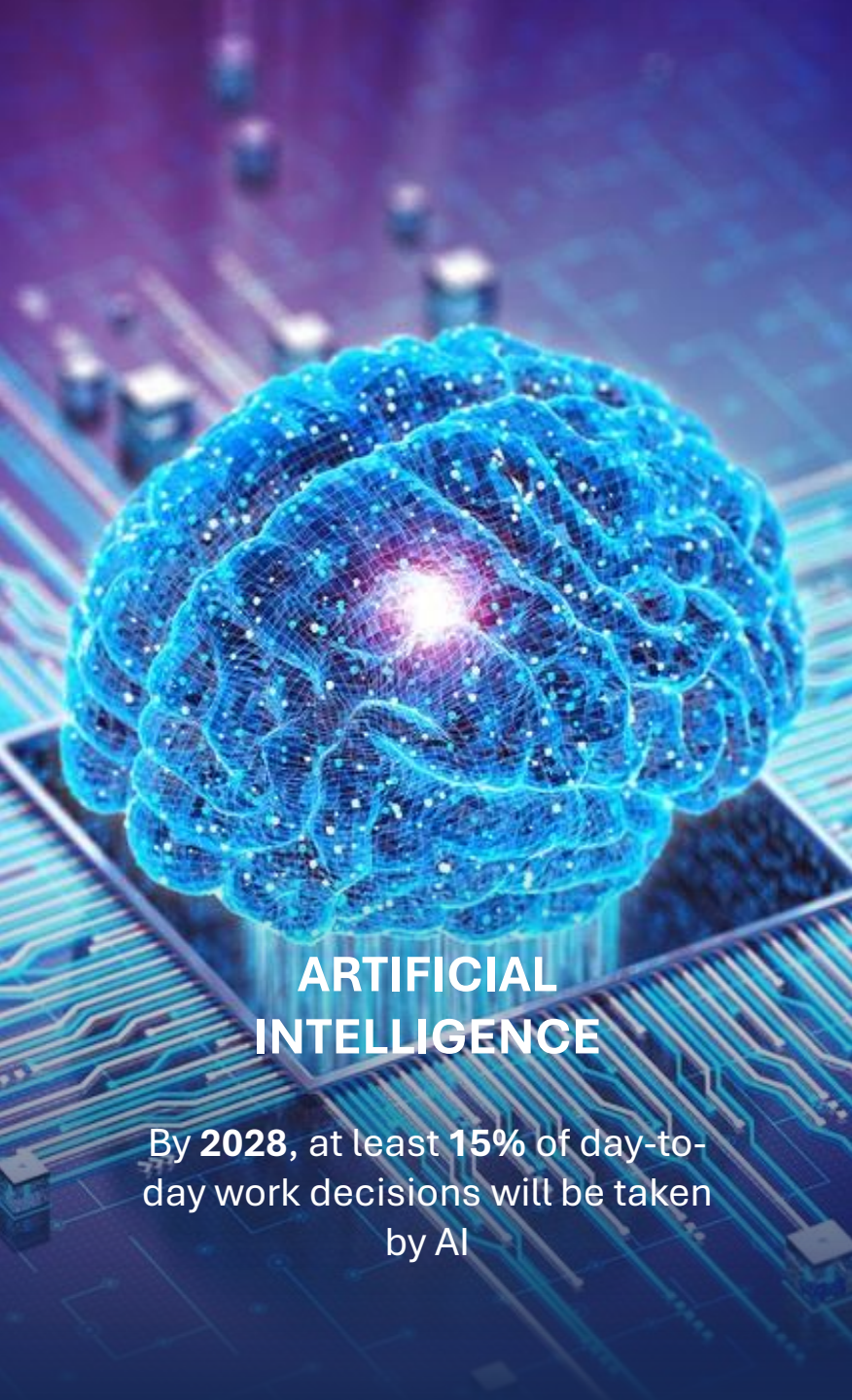
WHAT IF?

What if **early mental health education** helped young people **cope better with life's challenges?**

What if **employers integrated mental wellness into the workplace**, making emotional resilience a key performance metric?

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Source: Bangkok Post, Nation, WHO, Pacific Prime
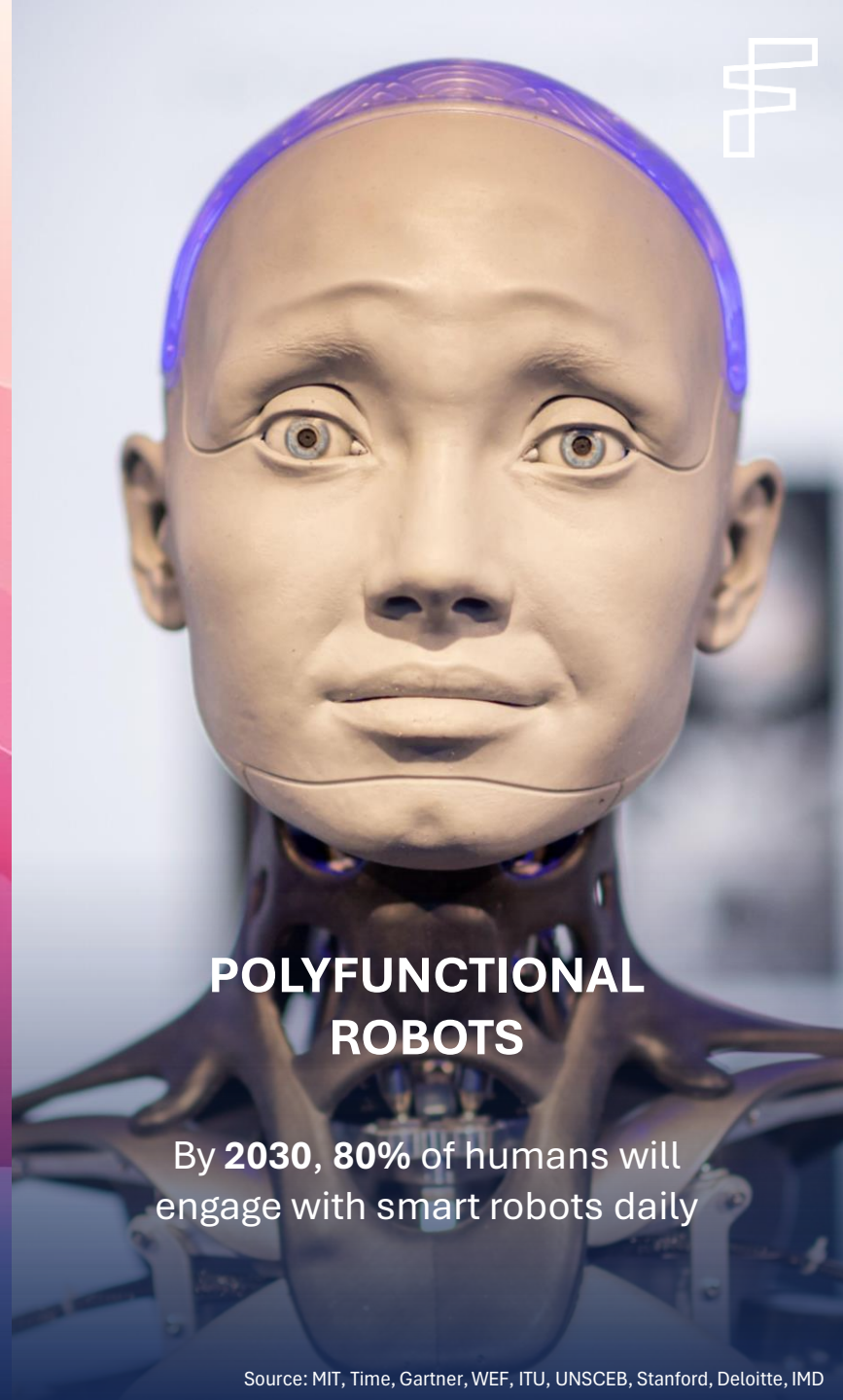
TECHNOLOGY

ARTIFICIAL INTELLIGENCE

By **2028**, at least **15%** of day-to-day work decisions will be taken by AI

SYNTHETIC MEDIA

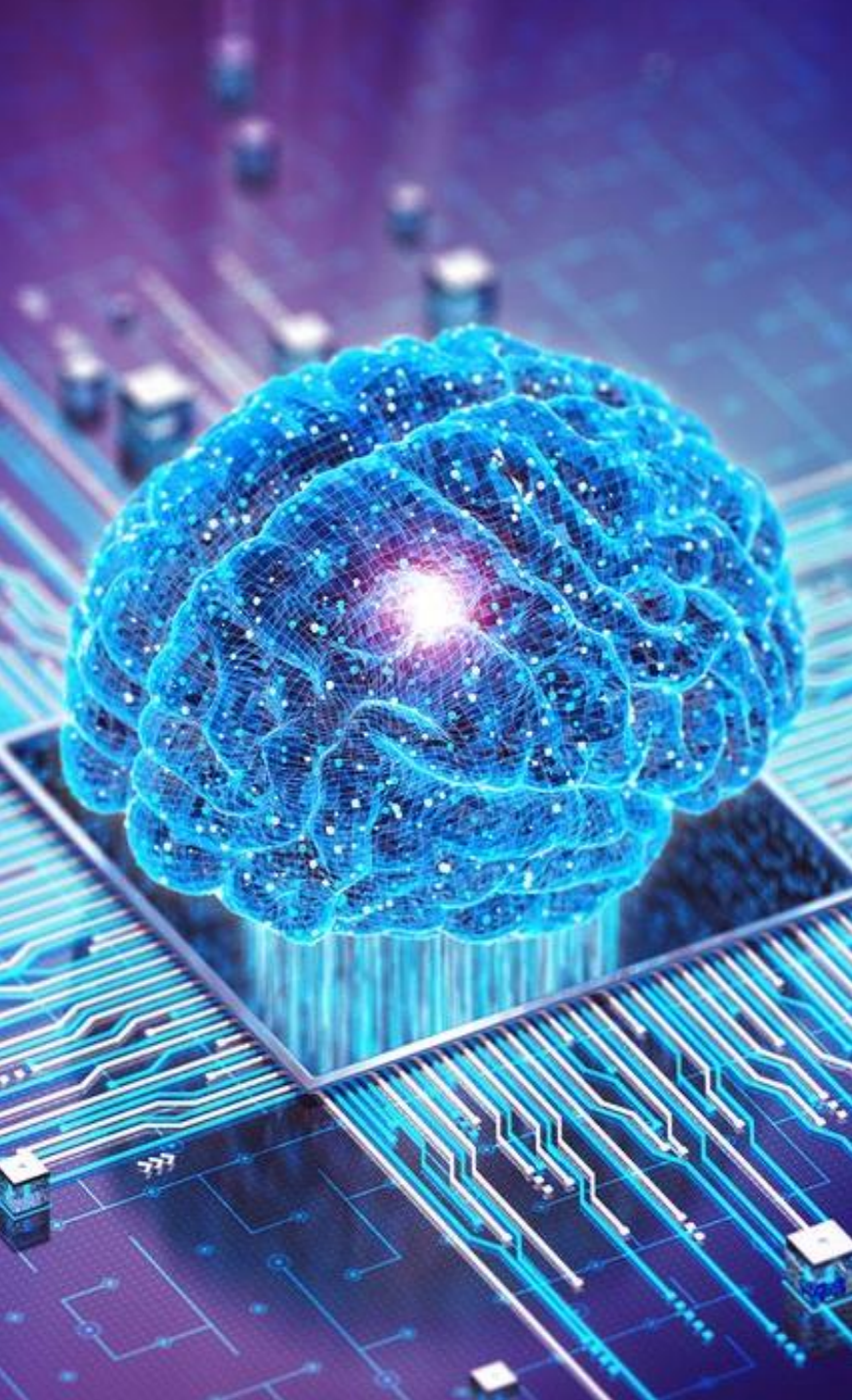By **2026**, **>90%** of online content could be synthetically generated

POLYFUNCTIONAL ROBOTS

By **2030**, **80%** of humans will engage with smart robots daily

ARTIFICIAL INTELLIGENCE

The global AI market is projected to grow significantly in the next 5 years

- AI-exposed sectors in Thailand could see productivity surges, with AI job postings growing **3.5 times faster than general job postings**, offering up to **25% higher wages**

- As AI adoption rises, Thailand's workforce will need to adapt, with AI-related skills in high demand across sectors like finance and IT

WHAT IF?

- What if Thailand's AI boom creates a '**brain gain**' instead of a '**brain drain**', **attracting global talent and retaining local experts**?

- How could this **transform Thailand's position on the global stage**, and **what policies would be needed to sustain this momentum**?

SYNTHETIC MEDIA

More than 90% of online content could be synthetic within the next year

- Thailand is grappling with a surge in online scams resulting in financial losses exceeding **THB39 billion** (2024)

- Deepfake and synthetic media have made it easier for scammers to impersonate reputable organisations and public figures to deceive victims
Recent news: Thai prime minister nearly scammed via AI call

WHAT IF?

- What if synthetic media becomes **so advanced that people stop trusting any online content** – news, videos, or even messages from loved ones?

- How would this e**rosion of trust reshape Thai society**, and **what systems could restore confidence in digital communication**?

POLYFUNCTIONAL ROBOTS

A plausible proxy in the future of population decline

- Thailand's ageing population is projected to increase significantly, with **21 million people aged 60 and older by 2040** i.e., **31.37%** of the total population

- This demographic shift presents challenges in healthcare and caregiving, where polyfunctional robots can play a crucial role in **assisting the elderly** and **enhancing their quality of life**
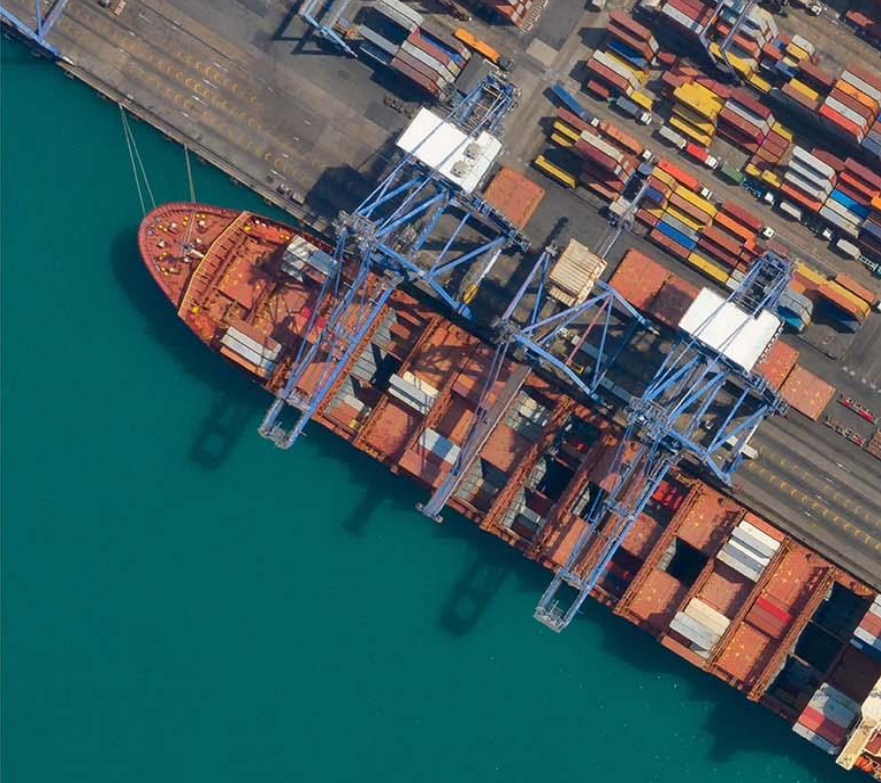
WHAT IF?

- What if polyfunctional robots become the **primary caregivers for Thailand's elderly population by 2040**?

- How would this shift **redefine family dynamics**, **cultural values**, and the **concept of caregiving in Thai society**?

ECONOMY

SUPPLY SHIFT

In **2025, 88%** of global businesses plan to reconfigure supply chains

TALENT NEXUS

57% of global businesses prioritise creative thinking as a core skill

GREEN CAPITAL

Expected growth annually (TH) over the next **5-10 years**: 15-20%

SUPPLY SHIFT

Repercussions of an increasingly fragmented world

- In **2025, 88%** of businesses globally plan to **reconfigure supply chains**, with **46% diversifying geographically** and **39% entering new markets**

- By **2035**, global value chains (GVCs) will shorten through re-shoring (**-4.5%** GVC participation), near-shoring (**-7.3%**), and friend-shoring (**-9.0%**), driven by geopolitical and economic realignments

WHAT IF?

- What if Thailand's supply chain industry faces a '**double-edged sword**', **benefiting from near-shoring and friend-shoring trends** but **struggling with competition from other ASEAN countries**?

- How could Thailand **differentiate** itself to **secure a leading position** in the new global trade landscape?

TALENT NEXUS

Soft skills and technological talents define the new-gen workforce

- In **2025, 69%** of businesses globally consider **analytical thinking** to be the **no.1** core skill for their workforce, while **creative thinking** ranks **no.4** at **57%**

- Thailand ranks among global leaders in AI adoption, with **62%** of workers already using generative AI in their daily lives

WHAT IF?

- What if Thailand prioritised the **development of soft skills** alongside **technological training** in its education system?

- How could this **dual focus** transform the **employability of future generations** and foster a more adaptive and resilient workforce by **2030**?

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GREEN CAPITAL

Amid green-washing, some countries are adopting real green policies

- In **November 2024**, Thailand issued its first **sovereign sustainability-linked bond worth THB 30 billion**, marking a significant step in its green financing strategy

- The Thai government aims to enhance its **bio-circular-green economy framework**, which is projected to contribute up to **25% of GDP** by **2025**
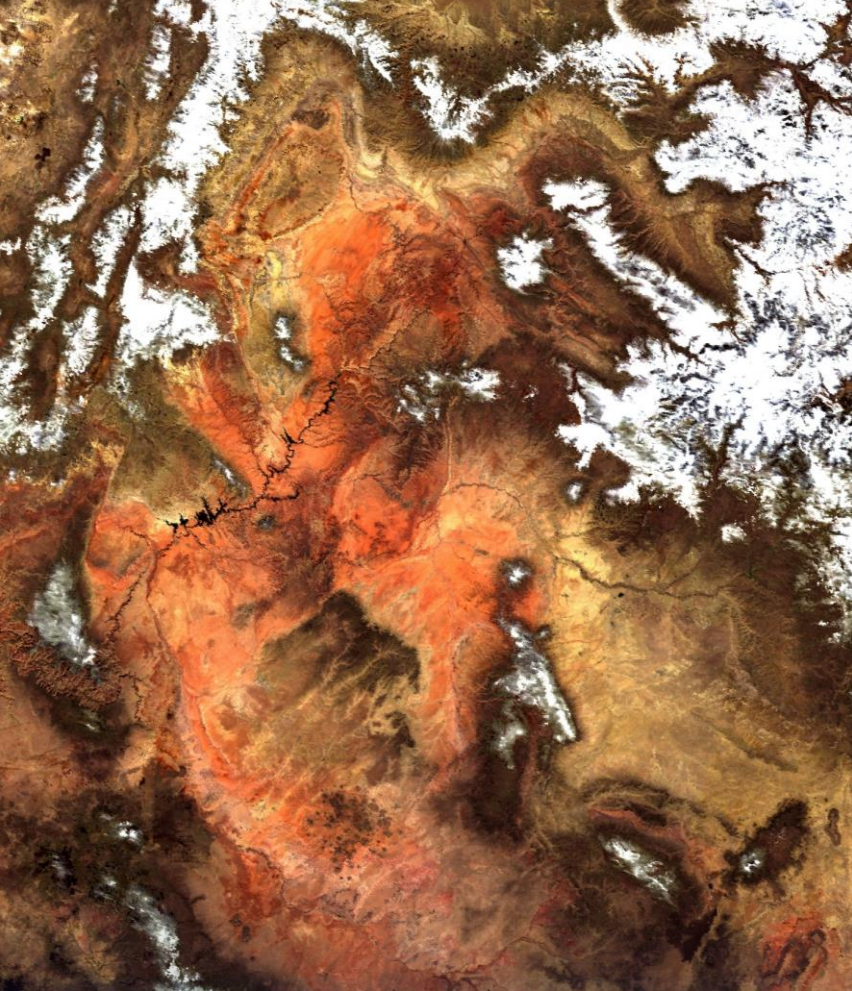
WHAT IF?

- What if Thailand's commitment to a bio-circular-green economy not only achieved its GDP contribution target of 25% by 2025 but also set a **global benchmark for sustainable economic practices**?

- How might this shift impact **social equity**, **job creation**, and **community resilience** in the face of **climate change**?
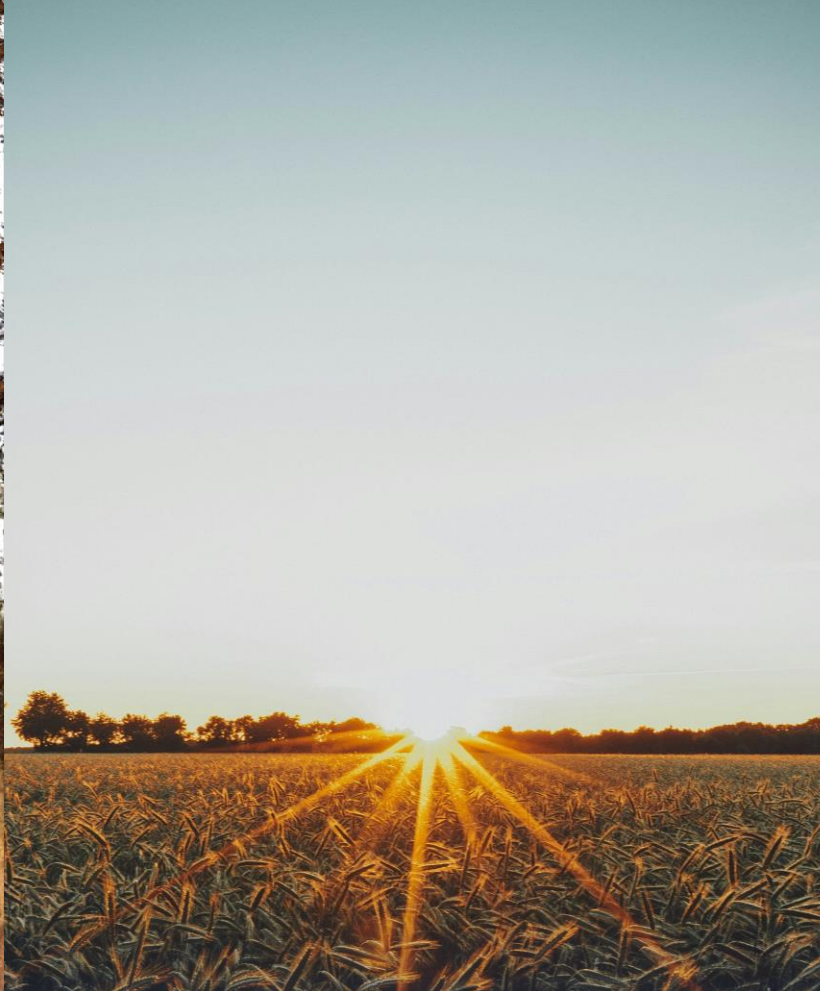
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ENVIRONMENT

RESILIENT EARTHSCAPES

Without intervention, climate change could **shrink global GDP by 17% by 2070**, with severe **losses exceeding 41% by 2100** in high-emission scenarios

REGENERATIVE PRINCIPLES

The Asia-Pacific regenerative agriculture market is projected to grow at a compound annual growth rate (CAGR) of **15.2% from 2023 to 2029**

NATURE CODES

A **$1.8 trillion investment** in early warnings, resilient infrastructure, dryland farming, mangrove protection, and water resources could yield **$7.1 trillion in avoided costs and benefits**

Source: UNFCC, UN, GCA, Reuters, KBV Research

RESILIENT EARTHSCAPES

Building a future that can withstand the storm

- Approximately **53% of the Asia-Pacific economy, nearly $18 trillion**, is directly dependent on nature, making it **vulnerable to biodiversity loss and climate impacts**

- Despite contributing **less than 1%** to global greenhouse gas emissions, **Thailand is highly prone to climate change effects**, particularly in its coastal provinces where key sectors like fisheries, tourism, and agriculture are at risk

WHAT IF?

- What if Thailand implemented comprehensive **early warning systems** and **community-based disaster preparedness programs** to mitigate the impacts of increasing natural disasters?

- What if we **engineered financial models that rewarded resilience**, shifting investment from post-disaster recovery to proactive adaptation?

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Source: ADB, UNDP, Statista

REGENERATIVE PRINCIPLES

Shaping a future that restores more than it takes

- Thailand has launched the **$120 million Thai Rice Project** to support 250,000 farmers, leveraging public, private, and climate finance to **advance regenerative agriculture**, improve soil health, and strengthen crop resilience

- APEC has adopted **regenerative tourism strategies**, aligning with Thailand's **BCG Economy Model** to foster a tourism industry that contributes positively to environmental and social well-being

WHAT IF?

- What if regeneration became the **core principle of education**, shaping future leaders to build **economies that thrive by healing, not harming?**

- What if **innovation** was measured not just by efficiency and profitability, but by how much it **regenerates and sustains the world around us?**

Source: Nation, Kearney, AgTech Navigator, SME horizon

NATURE CODES

Harnessing natural systems to tackle environmental and societal challenges

- In the Asia-Pacific region, **25.6% of the population** is employed in agriculture, forestry, and fishing sectors, highlighting the vital role of nature-based solutions in supporting livelihoods and economic stability

- A recent initiative aims to catalyze at least **$5 billion** in capital flows into nature-based solution projects across Asia and the Pacific, with **a minimum of 15%** sourced from the private sector

WHAT IF?

- What if businesses were required to **regenerate ecosystems in proportion to the resources they consume**, shifting industries toward net-positive environmental impact?

- What if **cities were designed to function like forests**, absorbing carbon, reducing floods, and regenerating biodiversity **instead of depleting resources?**

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Source: SDG Asia Pacific, ADB, OPEC fund, UNFCC

POLICY

ISOLATIONIST POLICIES

23% of global experts warn that conflicts will erupt as a result

AI GOVERNANCE

By **2028**, strong AI governance will cut ethical AI incidents by **40%**

AI GOVERNANCE

PERSISTING CONFLICTS

In **2024**, global armed conflicts cost **$14 trillion**

ISOLATIONIST POLICIES

Geopolitical tensions are contributing to an increase in mistrust

- The total number of trade policy changes recorded by Global Trade Alert reached **>1,000** in **2024** alone; highlighting a shift in focus towards domestic interests over international collaborations

- According to **WEF's Global Risks Report 2025**, **23%** of global experts identified state-based armed conflict as the top risk for **2025**

WHAT IF?

- What if Thailand's response to isolationist policies involved **strengthening community resilience** and **local governance**?

- How could these measures **reshape societal trust and engagement** in a time of increasing uncertainty?
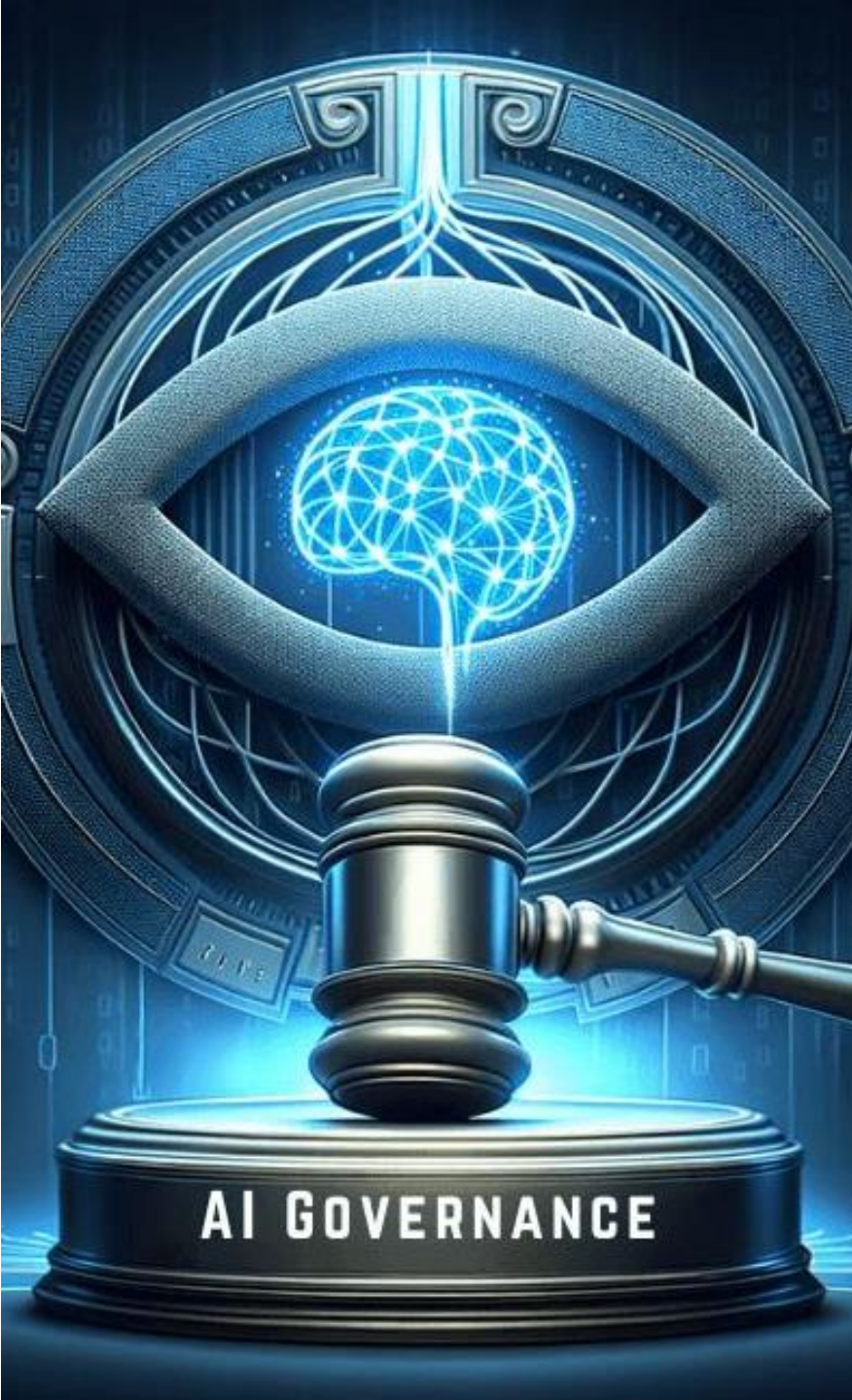
AI GOVERNANCE

Strong AI governance reduces ethical AI incidents and ensures equity

- Prioritising AI governance will ensure sustainable and equitable growth with Thailand's digital economy expected to contribute **30%** to GDP by **2030** and its AI market projected to grow **27.72% annually**

- Effective AI governance safeguards privacy and promotes transparency, aligning AI development with **human rights** and **societal values**

WHAT IF?

- What if the successful implementation of AI governance frameworks in Thailand not only safeguarded human rights but also **spurred innovation** in sectors like **healthcare**, **education**, and **agriculture**?

- How might this **dual focus** on ethics and innovation **reshape societal values** and **economic growth**?

PERSISTING CONFLICTS

The landscape of global conflicts is increasingly dire

- Globally, the economic burden of armed conflict is projected to reach approximately **$14 trillion annually** (2024 calculations)

- Projections from the end of 2024 anticipate that the number of deaths due to armed conflict could exceed **230,000**; marking an increase of over **30% in just one year** (2023-2024)

WHAT IF?

- What if Thailand actively positioned itself as a **sanctuary** for individuals fleeing armed conflict, implementing **inclusive policies** that facilitate their integration into the workforce?

- How could this influx of diverse talent **enhance innovation** and **cultural dynamism within Thai society**?

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Source: WEF, CFR, Stimson, Crisis Group

VALUES

FLOW STATE SOCIETY

A global survey across 27 countries found that 1% of adults and **4% of Gen Z identify beyond the male-female binary**, reflecting a **generational shift toward gender fluidity**

HYPER-YOU

89% of marketing decision-makers consider **personalization essential for their business's success** over the next three years (2025-2027)

COUNSCIOUS CONSUMPTION

Consumers are willing to spend an average of **9.7% more** on sustainably produced or sourced goods, even amid cost-of-living and inflation concerns

Source: WEF, Segment, PWC, Fox

PERSISTING CONFLICTS

Embracing evolving identities, roles, and lifestyles in a shifting world

- Among Asian American and Pacific Islander LGBTQ+ youth, 38% identified as transgender or nonbinary, with **46% using pronouns outside the traditional gender binary**, reflecting a shift towards more **fluid gender identities** among younger populations

- Thailand became the **first Southeast Asian country** to legalize same-sex marriage, with **1,832 registrations** on the first day

WHAT IF?

- What if workplaces globally adopted **gender-fluid policies** to create more inclusive environments?

- What if industries embraced **gender-diverse perspectives** to drive creativity, innovation, and social progress?

HYPER-YOU

Delivering tailored experiences to meet individual needs in a hyper-connected world

- In Southeast Asia, **68% of consumers** express frustration with brands that offer **generic and inconsistent communication**, highlighting the demand for personalized interactions

- The **personalized medicine** market in Thailand is projected to grow from USD 2.7 billion in 2023 to USD 5.8 billion by 2030, reflecting a compound annual growth rate (CAGR) of **11.4%**

WHAT IF?

- What if AI-driven personalization became so advanced that people **no longer actively made choices**, but rather, **choices were made for them?**

- What if personalized marketing created **'digital bubbles,'** reinforcing biases and **limiting exposure to diverse perspectives?**

CONSCIOUS CONSUMPTION

Redefining purchasing habits for a sustainable and intentional future

- In Thailand, **58% of consumers are purchasing more sustainable products** or those with a reduced climate impact, demonstrating a growing commitment to environmentally friendly consumption

- Nearly **60% of Asia-Pacific consumers report eating more fresh fruits and vegetables**, with 20% planning to reduce red meat consumption, reflecting a move towards healthier and more sustainable diets

WHAT IF?

- What if businesses prioritized **ethical sourcing and transparent supply chains**, empowering consumers to make sustainable choices?

- What if **shifting consumer values** forced companies to **replace profit-driven models with purpose-driven**, regenerative business strategies?

TRENDS SHAPING 2025

S	T	E	E	P	V
SOCIETY	**TECHNOLOGY**	**ENVIRONMENT**	**ECONOMY**	**POLITICS**	**VALUES**
SILVER REVOLUTION	RESILIENT EARTHSCAPE	ARTIFICIAL INTELLIGENCE	SUPPLY SHIFT	ISOLATIONIST POLICIES	FLOW STATE SOCIETY
REALITY REMIX	REGENERATIVE PRINCIPLES	SYNTHETIC MEDIA	TALENT NEXUS	AI GOVERNANCE	HYPER-YOU
INTUITIVE WELLNESS	NATURE CODES	POLYFUNCTIONAL ROBOTS	GREEN CAPITAL	PERSISTING CONFLICTS	CONSCIOUS CONSUMPTION

Why Foresight

In a world of constant changes, Foresight is not a luxury, it is a competitive edge.
Aging societies, climate crises, and tech-driven disruptions are reshaping the future.

Don't just react – anticipate.

Why FutureTales LAB

At FutureTales Lab, we empower you to visualize **"What's next?"**, make informed decisions, and stay ahead.

Let's shape the future together.

Explore the Future with Our Foresight Services

Workshops

2-Day Strategic Foresight Workshop
Build foresight capabilities and create actionable future visions

Half-Day Foresight Workshop
Gain fresh insights and solve challenges quickly

Reports

Customized Foresight Report
In-depth insights tailored to clients' goals

Industry Trend Report
Stay ahead with emerging trends and regular updates

Foresight Services

	2-day Foresight Workshop	Half-day Foresight Workshop	Customized Report	Industry Report
Best Suited For	Organizations looking to profoundly understand foresight methodologies and co-create strategic visions	Teams seeking a quick, action-oriented session to explore future possibilities or address specific challenges	Businesses requiring tailored insights to address unique challenges and explore future opportunities	Organizations that need regular updates on emerging trends to stay ahead in their industry
Purpose	• Build strategic foresight skills • Develop bold, future-ready visions • Co-create actionable strategies	• Spark fresh ideas • Solve specific challenges • Provide a new perspective in a short timeframe.	• Deliver in-depth analysis on plausible futures, opportunities, and challenges • Provide actionable insights tailored to the organization's goals	• Highlight ongoing trends and signals • Deliver consistent insights for proactive decision-making
Duration	2 full days	Half-day (3-4 hours)	Flexible timeline, depending on the scope of research (minimum 4 months)	Options of quarterly or annual reports
Deliverables	• Comprehensive workshop materials • Strategic foresight frameworks • Co-created visions and strategies.	• Summary of key insights • Frameworks and tools for immediate application • Hands-on activities	• Detailed foresight report • Analysis of key drivers, trends, and opportunities • Strategic recommendations	• Industry-specific trend insights • Regular updates on market changes
Value to Business	• Build long-term strategic foresight capability • Engage teams in co-creating resilient strategies • Align future visions	• Energize team with fresh perspectives • Identify quick wins for challenges • Build innovation momentum	• Future-proof strategic decision-making • Gain competitive advantage through unique insights • Reduce risks	• Stay ahead of market changes • Identify emerging opportunities and risks • Make timely decisions

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