



UNLOCKING THAILAND'S AI POTENTIAL 2025

The AI revolution is taking hold in Thailand

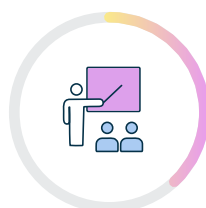
AI adoption¹ is accelerating at an unprecedented pace across Thailand, reshaping industries and redefining how businesses operate. In the past year alone, around 150,000 businesses² in Thailand began using AI – equivalent to over one every three minutes on average in the last year. This surge brings the total percentage of AI-adopting firms to **32%**, up from **24%** a year ago, representing a **33%** year-on-year growth rate. Today, more than 600,000 Thai businesses have integrated AI into their operations.

And the benefits are being realised: **67%** of businesses that have adopted AI report increased revenue, with an average increase of **17%**. Meanwhile, **81%** say they have already seen significant productivity improvements.

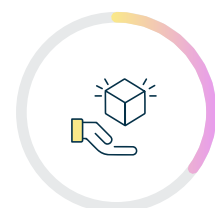
These improvements are enabling companies to reallocate resources toward:



Enhancing customer service and relationships (**44%**).



Investing in employee training (**38%**).

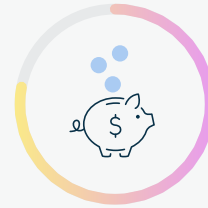


Developing new products and services (**35%**).

Sectoral adoption is also strong: manufacturing leads with **51%**, closely followed by IT and technology (**50%**) and financial services (**46%**). Looking ahead, across industries, optimism remains high:



82% of AI-adopting businesses expect the technology to increase growth over the next year.



78% already report cost savings, at an average of **17%** savings.

Indeed, a third of businesses in Thailand have taken the crucial first step in their AI journey of adoption. Yet, across the business landscape, **72%** of Thai businesses currently using AI remain in the early stages of implementation, without yet translating these capabilities into deeper innovation or business transformation.

To drive momentum behind AI and the digital transition, the government of Thailand has outlined its AI adoption route in its landmark [National AI Strategy and Action Plan](#). The strategy focuses on five core strategies: regulation, infrastructure, AI education, research and development in AI, and promoting AI adoption across public and private sectors.

Building on this, a recent initiative launched by the Thai Department of Skill Development (DSD) set out the objective [of upskilling and reskilling over five million workers in 2025](#) – underscoring the importance of digital technology to support industrial advancement. This initiative comprises 13 courses, spanning across the digital and AI sectors.

In July 2025, [The World Bank](#) published 'Thailand Economic Monitor: Digital Pathways to Growth', which examined the digital foundations and accelerators needed for sectoral digital transformation in accordance with the World Bank's Digital Framework. According to this report, Thailand's Digital public infrastructure (DPI) – referring to foundational digital building blocks designed for the public benefit – is among the most advanced in the region, setting the nation up to harness the AI revolution.

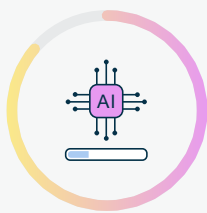
While AI adoption in Thailand has gained remarkable momentum, with millions of businesses already embracing the technology and reporting tangible benefits, the journey toward fully harnessing its transformative potential is still underway. Continued progress will depend not only on sustained government support and strategic investment, but also on the ability of businesses to move beyond basic adoption and embed AI more deeply into their operations. As Thailand builds on its strong foundation, the coming years will be critical in shaping an AI-powered economy that is innovative, inclusive, and globally competitive.

Key findings from this study

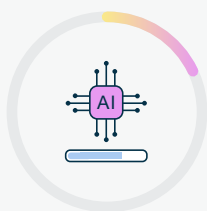
- AI adoption among businesses in Thailand is growing rapidly – with a growth rate of **33%**.
- Now, over 600,000 businesses in Thailand are using AI.
- **73%** of businesses believe that AI will transform their industry in the next five years.
- A lack of digital skills is the highest reported barrier, with well over half (**47%**) saying this restricts their AI adoption and expansion.
- **67%** of Thai businesses have seen an increase in revenue thanks to AI adoption, reporting an average **17%** revenue growth.
- **81%** of AI adopters say they have already seen significant productivity improvements.
- Among AI-adopting businesses, only **10%** of businesses have reached the most transformative stage of AI integration.

Widespread but basic AI adoption

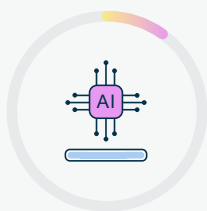
While nearly a third of businesses have adopted AI in Thailand, celebrating adoption figures alone masks an underlying trend: Looking deeper into how businesses are implementing AI, most Thai organisations remain at basic levels of AI adoption.



72% of Thailand's businesses remain focused primarily on more basic uses of AI and incremental gains (e.g., driving efficiencies and streamlining processes), rather than innovation (e.g., developing new products or disrupting industries). These businesses are using publicly available chatbots for routine tasks such as scheduling assistants and purchasing ready-made AI solutions.



18% have advanced to the intermediate stage of AI adoption. These companies are moving beyond isolated applications and integrating AI across various business functions, resulting in efficiency improvements and more innovative approaches to customer experience.



Only **10%** of Thai businesses have reached the most transformative stage of AI integration, where they are using AI for its most advanced purposes. These organisations are combining multiple AI tools or models for complex tasks, and creating custom AI systems that are transforming their operations comprehensively.

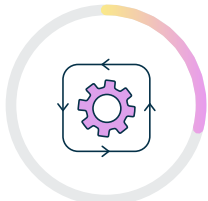
Among those who have adopted AI, the financial services industry is leading the way in terms of the most sophisticated AI uses, with **45%** at this stage, followed by technology and IT at **41%**, and retail at **36%**.

This trend underscores a critical divide in AI adoption – and regionally, a similar pattern is emerging. Only **10%** of Thailand's businesses have reached the most advanced stages of AI, compared to **9%** of those in Vietnam, and **8%** of those in the Philippines. While AI is increasingly being widely used across businesses in Thailand, a small segment of organisations have already harnessed the technology's most transformative potential. Most companies are still exploring AI's benefits, missing out on the deeper strategic advantages it can offer. To fully realise AI's promise, more businesses will need to move beyond experimentation and efficiency gains, and toward deeper integration and innovation.

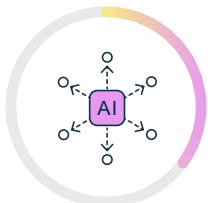


Thai startups are emerging as leaders for AI innovation

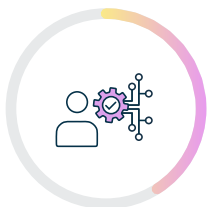
Beneath this trend, however, another pattern emerges: Businesses of different sizes and stages of development are progressing at very different speeds – especially when comparing startups with large enterprises. **50%** of startups³ have taken the first step of AI adoption. Of these, **40%** are beginning to build entirely new products and business models around it that would have been impossible just years ago.



Only **29%** remain at the basic stage of AI use.



35% of startups have AI at the core of their business proposition and operations, and **21%** are leveraging AI for its most advanced uses.



41% of startups employ AI-specific talent, indicating a strong commitment to building and nurturing in-house AI expertise, ensuring businesses can develop, deploy, and refine AI-driven strategies.

73% of businesses overall and **84%** of startups believe AI will transform their industry in the next five years, making Thailand's fast-moving startups key to innovation and competitiveness on the continent.



Case Study: Botnoi Voice is leveraging AWS to generate natural Thai speech

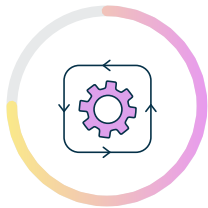


[Botnoi Voice](#) has revolutionised Thai language processing through AWS's advanced AI capabilities. By migrating to a customised Amazon Nova Lite system, they've created a sophisticated text-to-speech solution serving finance, education, and media sectors. The transformation delivered concrete improvements: **20%** enhanced response latency, **7%** improved accuracy, and **30%** cost savings.

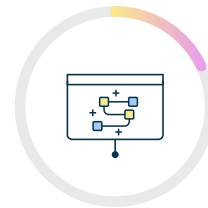
Their fine-tuned system has set new benchmarks for Thai language AI, enabling more natural and accessible customer experiences across industries.

Large enterprises and SMEs represent great untapped potential

In contrast, large enterprises are not yet harnessing the most advanced uses of AI, representing a source of great untapped potential for Thailand. While **44%** of large enterprises⁴ have adopted AI technologies, significantly greater than the national average of **32%**, most are currently not using them as deeply as startups, resulting in this emerging 'two-tier' AI economy.



For **75%** of large enterprises, their AI adoption remains at basic levels, where they are focused on incremental efficiency gains and streamlining production processes. While large enterprises are quick to enable localised productivity and efficiency gains, their younger, more agile startup counterparts are surging ahead with implementing AI's most sophisticated and transformational uses.



Only **18%** of Thailand's large enterprises have a comprehensive AI strategy, a roadmap that outlines how an organisation will leverage AI. **16%** are delivering a new AI-driven product or service by harnessing AI's deeper potential, less than half of the proportion of startups **40%**.

Additionally, SMEs are broadly in line with the national average when it comes to AI adoption (**32%**) and AI maturity. As with large enterprises, a significant majority (**73%**) remain at basic levels of AI adoption, while **9%** are leveraging AI for its most advanced uses. As SMEs represent the majority of Thai businesses, this represents considerable untapped potential.

Both large enterprises and SMEs show a readiness to integrate AI when given the right tools and support. If left unaddressed, this widening divide could further entrench a "two-tier" AI economy, where agile, tech-driven startups are striding ahead of the business landscape, including large enterprises, in deploying the most advanced, value-creating uses of AI. Such a gap threatens to constrain Thailand's overall AI-driven growth and global competitiveness.

By empowering businesses of all sizes to adopt and scale advanced AI solutions, Thailand can accelerate productivity growth and digital progress across the majority of its business landscape. Moving beyond basic adoption for businesses of all sizes is key to unlocking the full benefits of AI for Thailand's economy and society. Recent [research](#) by the Telecoms Advisory Service, on behalf of AWS, found that cloud and AI added over \$3.3 billion to Thailand's GDP in 2023. The research also found that cloud as a whole is set to add \$2.8 trillion to the Asia-Pacific region's GDP by 2030, with nearly \$203 billion alone coming from cloud-enabled AI.

Case Study: Sansiri is building better with AI to drive a new era of real estate innovation



[Sansiri](#), a leading Thai real estate developer, has embraced AWS's AI solutions to enhance operations across their business. Their implementation of AWS Generative AI ChatX Assistant serves 3,000 users across 500 projects, improving customer response time by **30%**. Their Gen AI OCR solution processes 50,000 monthly invoices with **90%+** accuracy, reducing verification time by **50%**. Additionally, 30 developers now leverage Amazon Q Developer for enhanced software development and security. These initiatives demonstrate Sansiri's commitment to AI-driven operational excellence.

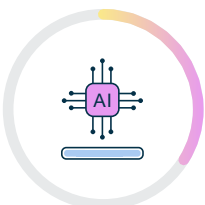


Key barriers are preventing Thai businesses from fully leveraging AI

Four key barriers are restricting AI adoption and innovation in Thailand:

Skills:

Businesses across Thailand identify a lack of digital and AI skills as the top challenge to AI adoption, with **47%** of businesses saying it prevents them from adopting or expanding their AI use. Businesses expect that AI literacy is expected to be important for **61%** of jobs in the next three years and only **29%** of businesses feel prepared with their current skillset. The skills barrier is most prominently reported by the tech and IT industry at **60%**, followed by the manufacturing industry at **55%** and retail at **54%**.



Approximately **34%** of employees have participated in digital training or upskilling in the past year.



As a result of the skills gap, businesses say they would be willing to increase a salary offer by **36%** to a candidate with strong AI skills.

Compliance:

Thai businesses are facing increasing compliance costs, estimating that \$27 out of every \$100 they spend on tech goes towards international and domestic compliance-related costs.



While this is currently on par with Indonesia (\$25), and higher than Vietnam (\$18) and the Philippines (\$19), it is nonetheless substantial – especially in a market where digital adoption is still scaling. A striking majority, **76%**, of Thai businesses expect these compliance costs to increase further in the next 3 years.

Regulatory uncertainty:

Across the world, businesses are facing growing regulatory uncertainty as new rules are considered for emerging technologies like AI.

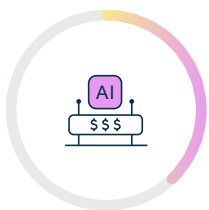


When considering the positive impact potential new regulation might have on their business, the number one reported hope was that new AI regulation would increase confidence among customers (**49%**) followed by providing a stable regulatory framework (**39%**).



Similarly, regarding concerns around the introduction of new regulation, businesses express worries about creating overly complex or unclear regulations (**35%**) and slowing down AI innovation and adoption (**33%**). This demonstrates the critical importance of taking a pro-innovation approach and providing regulatory certainty to businesses as they consider these next technologies.

Perceived costs:

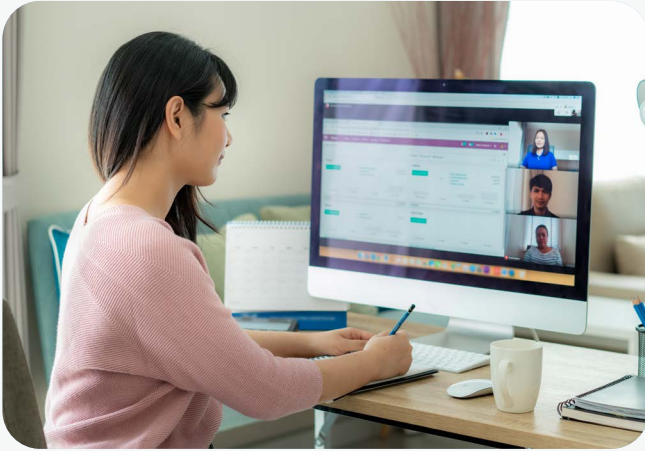


38% of Thai businesses cite perceived upfront costs as a key barrier to AI adoption. Four in ten (**42%**) businesses also report needing a clearer understanding of AI's return on investment – despite that, **67%** of AI-adopting businesses have seen an increase in revenue, reported at an average **17%** revenue growth.

These barriers risk acting as a brake on the pace of Thailand's digital transformation. Addressing them is essential to sustaining the country's AI adoption and innovation momentum.



Case Study: SEAC transforms learning delivery with AWS Bedrock Generative AI



BTS Consulting Thailand (SEAC), leading professional consulting and learning solutions provider, transformed their Learning & Development delivery model by implementing AWS Bedrock's generative AI solutions. Working with AWS and ECV Thailand, they overcame traditional scaling limitations that typically required linear headcount growth. The implementation of Claude 3.7 and Cohere models, combined with custom guardrails and knowledge bases, revolutionized their L&D operations. The results were transformative: **75%** reduction in operational time, **60%** cost savings, and the ability to scale capacity by **500%** without additional headcount. Through their STAR APP, SEAC now serves 87 companies with automated learning cycles that complete in 60 minutes instead of weeks.

AWS is committed to supporting businesses and the digital transition in Thailand

In 2025, AWS launched its [AWS Asia Pacific \(Thailand\) Region](#), allowing AWS customers to run workloads and securely store data in Thailand by leveraging advanced AWS technologies.

Through an investment of more than US\$5 billion in the country, AWS estimates the new AWS Asia Pacific (Thailand) Region will create more than 11,000 full-time equivalent jobs annually in Thailand, and contribute approximately US\$10 billion to Thailand's GDP. AWS also launched a new AWS Local Zone in Bangkok in 2022.

AWS is dedicated to closing the skills gap in Thailand through its skills initiatives. To date, AWS has trained over 50,000 individuals on cloud skills since 2017.

AWS is committed to providing people of varying backgrounds and experiences with the technology skills they need to prepare for jobs of the future. We provide a variety of training modules to meet learners where they are, including programs done in collaboration with the Thai government, public sector agencies, and education institutions.

AWS is working with organizations such as Ministry of Digital Economy and Society (MDES), Ministry of Higher Education, Science, Research and Innovation (MHESI), and leading companies like CP Foods and Central Group, to help address the digital skills gap. AWS Academy is currently available to students at 25 Thai institutions across Thailand, including Chulalongkorn University, Thammasat University, and Chiang Mai University.



Unlocking the full potential of AI through three crucial actions

Thailand has the right tools and the ambition to lead in AI, not only in a more widespread adoption of technology, but also in innovation. AWS urges policymakers and industry leaders to take action to unlock AI's full potential across both startups and large enterprises:

1. Accelerate private sector digital adoption through boosted skills efforts:

Streamline access to government funding, build industry-specific digital skills programs (**64%** see skills as crucial, only **29%** feel prepared). This mismatch highlights the need for targeted upskilling initiatives, including partnerships between government, industry, and educational institutions. Closing this gap is key to unlocking Thailand's next wave of innovation, productivity, and growth.

2. Establish a pro-innovation and pro-growth regulatory environment:

Maintain a clear and streamlined regulatory framework to encourage confident investment and accelerate AI-driven innovation. Aligning with international standards and legal definitions can further reduce compliance costs globally, including in Thailand. Developing a clear, tangible National AI Strategy will provide businesses with the stability and guidance needed to adopt and innovate with AI.



Businesses in Thailand are facing rising international and domestic compliance costs on technologies, spending **27%** of their tech spend on compliance.



76% anticipate this figure to rise, acting as a barrier to increased AI adoption, which risks missing out on key opportunities for growth and innovation throughout Thailand.

3. Increase public sector adoption of AI:

Prioritise digital transformation across industries such as healthcare and education, use public procurement to drive innovation, and create test-beds and cross-border exploratory projects using AI to deliver new services.



67% of Thai businesses say they are more likely to adopt and expand their AI use when the public sector leads.



65% of startups say that public sector adoption is crucial to their ability to scale, attesting that the public sector adoption of new technologies is crucial to increasing trust in these technologies

Thailand's AI revolution is well underway, but realising its full promise will require empowering all businesses to not only take the first step toward AI adoption, but to advance from experimentation to innovation with the technology. By deepening adoption and scaling sophisticated AI use, Thailand can secure lasting productivity gains, stimulate innovation, and strengthen its position in the global digital economy.

Appendix

Methodology

The fieldwork for this study was undertaken by Strand Partners' research team for Amazon Web Services. This research has followed the guidance set forth by the UK Market Research Society and ESOMAR. For the purposes of this study, business leaders are defined as founders, CEOs, or members of the C-suite in organisations.

'Citizens' are nationally representative members of the public based on the latest available census.

For inquiries regarding our methodology, please direct your questions to: polling@strandpartners.com.

In Thailand:

- We surveyed 1,000 members of the public, ensuring representation based on age and gender.
- Additionally, we surveyed 1,000 businesses, representative by their business size and sector.

Sampling:

Our sampling process used a mix of online panels that are recognised for their validity and reliability. These panels are carefully curated to ensure diverse representation across various demographics. For the business leaders, the panels are selected with a consideration for organisational size, sector, and position within the company. Our objective with the sampling strategy is to achieve an optimal mix that mirrors the actual distribution of our target populations in the respective markets.

Weighting Techniques:

Post-data collection, we applied iterative proportional weight to correct any discrepancies or over-representations in the sample.

Survey:

This study was designed with the objective of delving deep into the digital landscape:

- Usage Patterns: This survey gauges the evolving patterns of digital technology usage. We are particularly interested in examining the adoption and implementation levels of technologies, focusing on cloud computing and artificial intelligence.
- Perceptions and Attitudes: The survey seeks to unearth the prevailing perceptions and attitudes toward digital technologies, understanding the perceived benefits, challenges, and potential ramifications of both present and emerging tech solutions.
- Barriers and Opportunities: The survey scrutinises the predicted challenges and potential avenues that both businesses and individuals anticipate on their digital trajectory. This involves pinpointing challenges, from skill deficits to regulatory complications, and recognising opportunities for growth, innovation, and market development.
- 'Size of the Prize': The survey shed light on the economic repercussions and growth prospects linked with digital transformation. By elucidating the 'size of the prize', we aspire to stress the importance of digital transformation and foster further investments and technology adoption.

References

1. "Adopted AI" or "consistently use AI": a business that consistently uses at least one AI tool. This would not include businesses that experimented with AI once or twice, or ran a temporary pilot programme, for instance.
2. Calculated based on recent estimations of the total number of active enterprises, which was 1.96 million in 2024: [Thai Business Registrations Hit Record High, Japan Emerges as Leading Investor - Thailand Business News](#)
3. A startup is a business founded in the last 2 years which provides a new product/service or innovation and is aiming for rapid growth in terms of employees and turnover.
4. A large business is a business with 500 or more employees, founded 10 years ago or more.