

IS THAILAND ON THE PATH TO AN INCLUSIVE RECOVERY?

Findings from 2 rounds
of high-frequency surveys



Authors and acknowledgements

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Foreword

The COVID-19 pandemic has had a profound impact on the world, and Thailand has not been immune to its effects. The Royal Thai Government's decisive policy response since the onset of the pandemic has been crucial in mitigating some of the worst impacts of the crisis on the people and the economy. In 2022, as the world started to recover from the pandemic, the global spike in prices sent new shock waves through the world's economy and renewed concerns about an uneven recovery.

UNICEF's High-Frequency Surveys were designed to help unpack the recovery trajectories of different population groups across socio-economic dimensions, in such areas as employment, income, food security, coping strategies, education, and health. The two rounds of surveys, conducted in September 2022 and March 2023, aimed at tracking the impact of COVID-19 as well as other shocks, specifically increases in food and energy prices.

The report highlights an overall positive recovery trend between the first and second survey rounds, with significant improvement in jobs and income across all population groups. However, challenges remain in areas of care obligations, household debt, and saving which primarily affect families with children. These challenges once again highlight the need to invest more in children, who are crucial to the present and future prosperity of the country.

I hope that this report will complement the ongoing efforts of the Royal Thai Government in steering the country towards inclusive recovery, and provide an evidence base for further policy dialogue to address the challenges that need to be overcome for the country to stay on the path of sustainable development



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Representative



Key findings

- The **improved labour situation** reported by respondents in March 2023 reflects a continuing positive trend towards overall recovery. The recovery dynamic was also positive for people who lost their jobs during COVID-19, but then returned to work, with many groups that were lagging behind in September 2022 now 'catching up'.
- **Care (especially childcare) obligations** continue to be a critical obstacle for employment. Overall, 20 per cent of respondents reported being unable to work due to caring for a child, with women covering most of the unpaid care obligations for young children. In addition, 37 per cent reported the cost of childcare services as prohibitive.
- In March 2023, most respondents across all demographics and household composition indicated an **income increase**, suggesting a complete reversal of the previous negative income trend.
- When asked about their **top three issues of concern**, price increases remain the biggest concern for people. However, the second and third issues that worry people have changed: while COVID-19 and poverty were cited second and third by respondents in September 2022, crime and violence and unemployment were the second and third biggest concerns in March 2023.
- Households continue to use a large variety of **coping strategies to survive and mitigate the shocks brought about by the COVID-19 outbreak**. While reduction of food consumption or a shift to cheaper food items was a predominant strategy in September 2022, it became less utilized by households in March 2023.
- In terms of **relying on savings** as a coping strategy, 70 per cent of all households across regions, household composition, gender and urban/rural areas reported in March 2023 that their savings had decreased in the past six months or were non-existent.
- **Borrowing from banks and from friends** increased in 2023. Respondents in March 2023 were more likely to indicate that they took out a loan from a financial institution, rising from 21 per cent to 40 per cent. In March 2023, 40 per cent of households with children reported delaying payment obligations.
- **Food security** improved between March 2023 and September 2022 across all indicators.
- Around 70 per cent of households in March 2023 reported receiving **social assistance from the government**. When asked about difficulties obtaining social assistance payments, only 2 per cent mentioned experiencing challenges. This is an improvement compared to September 2022 when 14 per cent reported experiencing challenges in accessing social protection benefits.
- In March 2023, almost 100 per cent of respondents reported that all adult members of their household received at least two shots of the COVID-19 vaccine at the time of the survey, indicating a **high level of vaccine uptake**.
- The survey results also indicated **good overall access to medical services** over the last 12 months (including regular check-up services and vaccination), both for adults (98 per cent) and children (99 per cent).
- In March 2023, nearly 100 per cent of respondents across all strata reported that their children had returned to school, and were also considering sending children to school next semester. This is an increase from the 94 per cent who reported their children had returned to school in September 2022.
- A majority (94 per cent) of respondents with children aged 7-17 years also reported in March 2023 that their **children had no difficulties catching up on learning** after returning to school.



Why this report and why now?

In 2022, Thailand's economy rebounded and showed a steady recovery trajectory as COVID-19 restrictions gradually relaxed. The growth rate for the Thai economy in 2022 was 2.6 per cent, surpassing the 1.5 per cent growth in 2021 and recovering from the severe contraction of 6.2 per cent experienced in 2020. The revival of the tourism sector and ongoing enhancements in domestic demand, encompassing private consumption and investment, primarily propelled this growth. Headline inflation, however, reached 6.1 per cent.¹

The government has taken a series of measures to mitigate the impact of COVID-19. Simulations have shown that without the special social protection measures taken by the government at the early stages of the pandemic, poverty would have risen substantially.² However, significant inequalities persist, and poverty levels have not returned to pre-pandemic levels. According to the National Economic and Social Development Council (NESDC), in 2021, the poverty rate among children was 9.9 per cent, significantly higher than that of the overall population (6.3 per cent).³

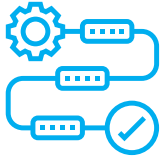
While economic recovery continued to pick up in 2022, not all segments of the economy and groups of people were recovering equally. UNICEF's High-Frequency Surveys have been designed to assess the socio-economic effects of the COVID-19 crisis on the welfare of the households, and to track the recovery trajectories of various population groups across socio-economic dimensions, in such areas as employment, income, food security, coping strategies, education, and health. The survey focuses on tracking the impact of COVID-19 as well as other shocks, specifically increases in food and energy prices.

This report presents the results of two rounds of High-Frequency Surveys: Round 1 was conducted in August/September 2022 and Round 2 in February/March 2023. The High-Frequency Surveys provide timely information for decision-making by capturing trends and taking the pulse of the situation. The data collected through these surveys will supplement national surveys like the 2022 Multiple Indicator Cluster Survey (MICS) and 2022 National Disability Survey, as well as regular socio-economic and labour market surveys conducted throughout 2022 and early 2023.

¹ NESDC. (2022). Thai Economic Performance in Q4 of 2022 and the Outlook for 2023. Available at: https://www.nesdc.go.th/nesdb_en/article_attach/article_file_20230217092855.pdf

² World Bank. (2021). Thailand Economic Monitor July 2021: The Road to Recovery. Available at: <https://www.worldbank.org/en/country/thailand/publication/thailand-economic-monitor-july-2021-the-road-to-recovery>

³ NESDC. (2021). Available at: <https://www.nesdc.go.th/main.php?filename=PageSocial> (in Thai)



Methodology

The multi-round surveys targeted a nationally representative sample of 2,000+ adults aged 18 years and older with access to mobile phones. Panel data was collected through two rounds (see Table 1).

Table 1. Survey statistics, Rounds 1 and 2

| | Round 1 | Round 2 |
|-------------------------------|--|---|
| Data collection period | August 3-September 14, 2022 | March 2-24, 2023 |
| Respondents | 2,720 | 2,007 |
| Response rate | 30% from random digit dialing (8,579 calls were made to reach 2,720 respondents) | 73.7% of Round 1 respondents completed the Round 2 survey |

Survey results are representative at the national level, across five regions, urban/rural, and households with and without children. The surveys were carried out by GeoPoll using Computer Assisted Telephone Interviews (CATI). For Round 1, random digit dialing (RDD) was employed to reach 2,720 individuals. For Round 2, a sub-set of 2,007 individuals were interviewed.

The survey content was designed to monitor the impact of COVID-19 and recovery across key social and economic dimensions affecting the welfare of households and children.

The questionnaire focused on the following thematic modules:

1. Work and Income
2. Childcare
3. Issues worrying people
4. Coping strategies
5. Social assistance
6. Health and vaccination
7. Education

Sample

The sample of households was not designed to exactly reflect the population of households in Thailand. Some types of households were over- or under-represented in the sample. For example, the regions were allocated equal sample sizes. The sample was also designed to over-represent households with children. To compensate for the imbalance of the sample, individual household weights were calculated. The sample of households was divided into region, urban/rural area, and households with/without children, totaling 18 groups ("post-strata"). Please see Figure 1 and Figure 2 below for the distribution of household demographic characteristics for Round 2 compared with 2019 MICS demographics.

Figure 1. Respondent demographics, Round 2

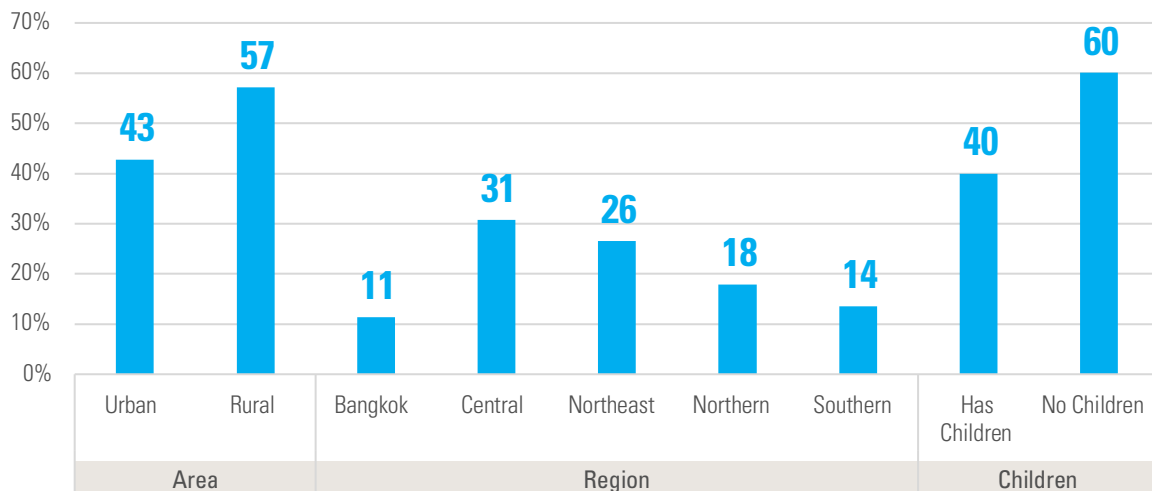
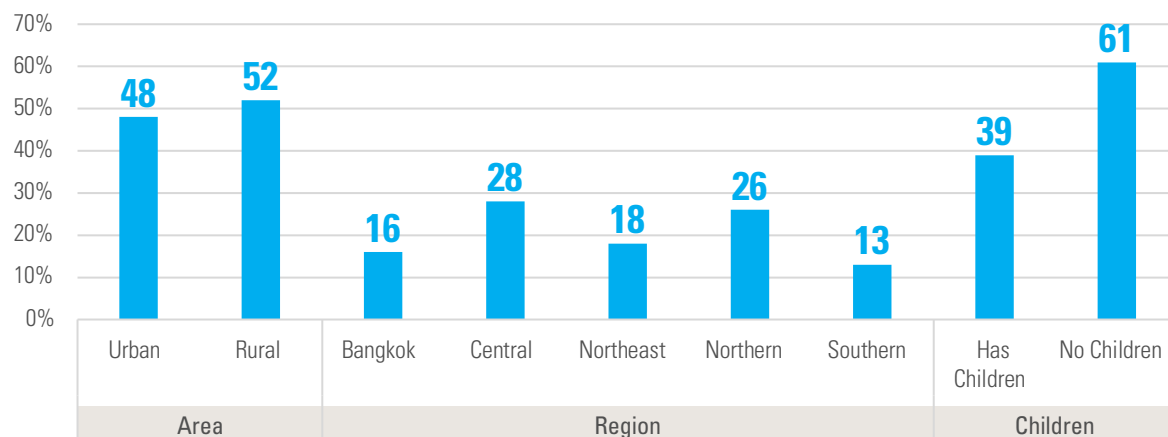


Figure 2. Thailand MICS 2019 demographics



High-Frequency Survey Results

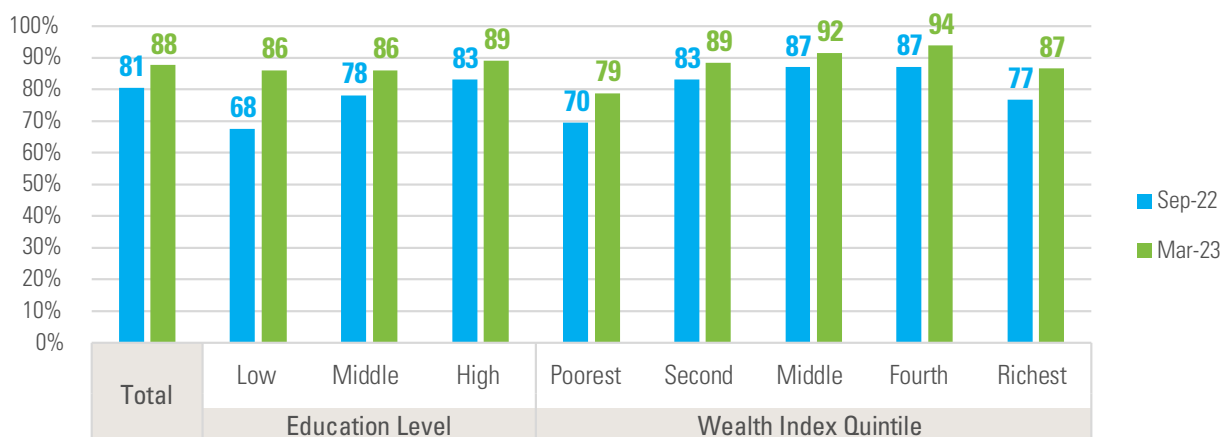
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Work and income

The labour situation in March 2023 reflected an overall recovery demonstrating a continuing positive trend. A total of 88 per cent of respondents indicated that they were working in March 2023, compared to 81 per cent in September 2022⁴ (see Figure 3). These results are also in line with key national statistics indicating improvements in the general labour situation. According to the latest NESDC report, employment continued to increase for the tenth consecutive quarter. In the fourth quarter of 2022, employment continued to expand by 1.5 per cent, compared with a 2.1 per cent increase in the previous quarter.⁵

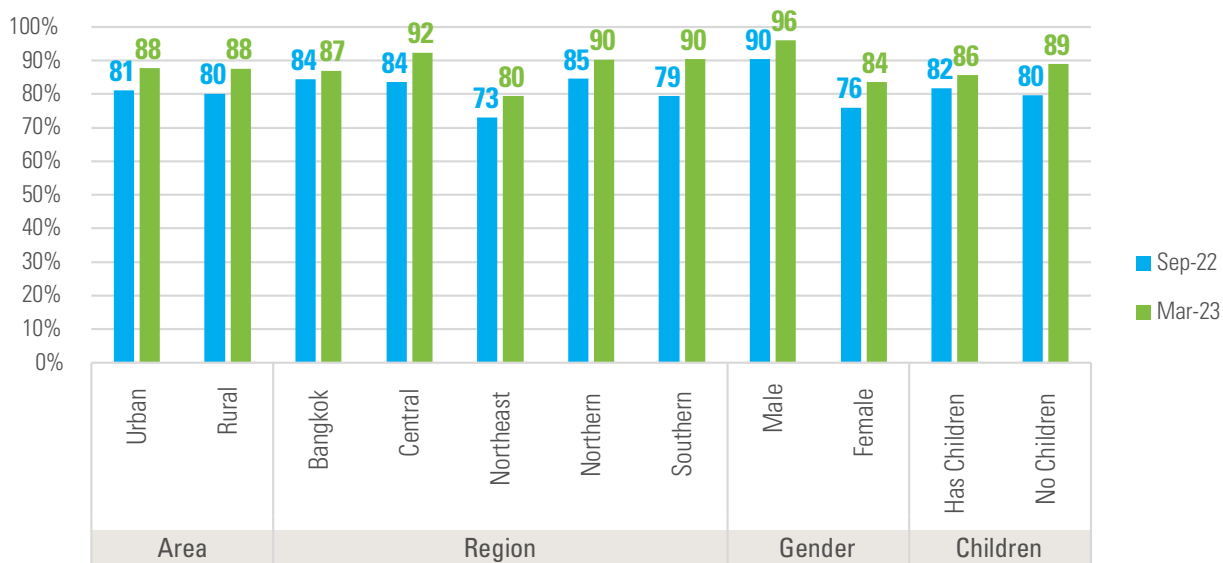
Figure 3. Proportion of respondents who worked in the last week, %, by education and wealth index



4 World Bank (2020). Impact of COVID – 19 On Thailand’s Households. Available at: <https://documents.worldbank.org/en/publication/documents-reports/documentdetail/390821633313679563/impact-of-covid-19-on-thailand-s-households-insights-from-a-rapid-phone-survey>

5 NESDC. (2022). Thai Economic Performance in Q4 of 2022 and the Outlook for 2023.

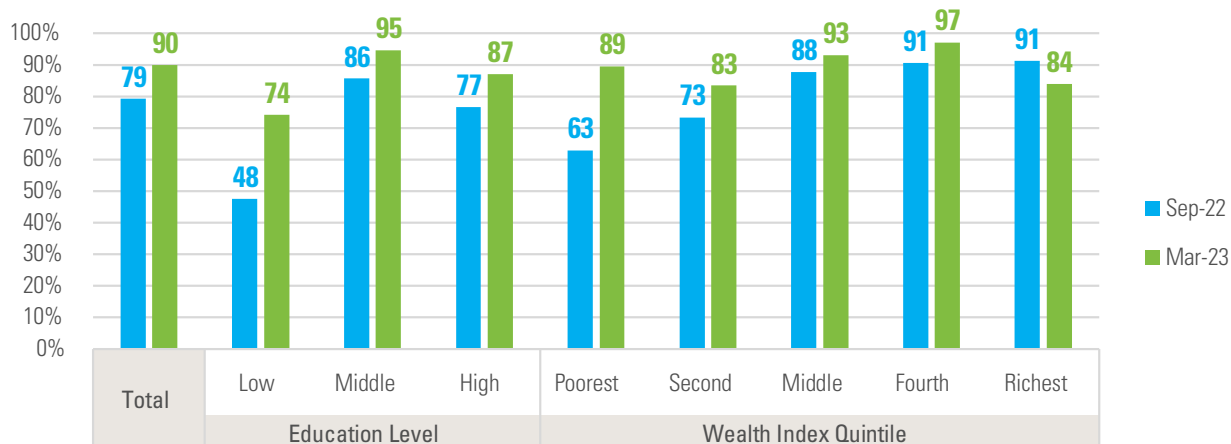
Figure 4. Proportion of respondents who worked in the last week, %, by area and household composition



However, there were variations in the labour situation across population groups. As shown in Figures 3 and 4, in March 2023, the proportion of respondents who reported working in the last 7 days was lowest among the poorest quintile (79 per cent), in the Northeast region (80 per cent), and among those with less education (86 per cent) and respondents with children (86 per cent). When asked about their perception of the overall employment situation, a majority of households responded positively, noting that in general their situation had improved (59 per cent). A large majority (92 per cent) of these respondents indicated that better pay was responsible for their improved employment situation.

In terms of the proportion of people who had lost their jobs during COVID-19, but then returned to work, the recovery dynamic was also positive. Results indicated that more people reported returning to work in Round 2 (defined as those who started working again after losing their job or business as a result of COVID-19), with an increase from 79 per cent in September 2022 to 90 per cent in March 2023 (see Figure 5). Of those in Round 2 who lost jobs and started working again, around 84 per cent did so over the last six months.

Figure 5. Proportion of respondents who started working again after losing their job or business as a result of COVID-19, %, total, by education and wealth index



In both rounds, households with children generally found it more difficult to start working again after losing jobs than households without children. However, the situation in March 2023 seemed more positive, with the dynamics of the last six months indicating that households with children are ‘catching up’. Households without children saw an increase of 7 percentage points (from 84 per cent to 91 per cent), whereas households with children saw an increase of 18 percentage points (from 69 per cent to 87 per cent) (see Figure 6 and Table 2).

Figure 6. Proportion of respondents who started working again after losing their job or business as a result of COVID-19, %, by area and household composition

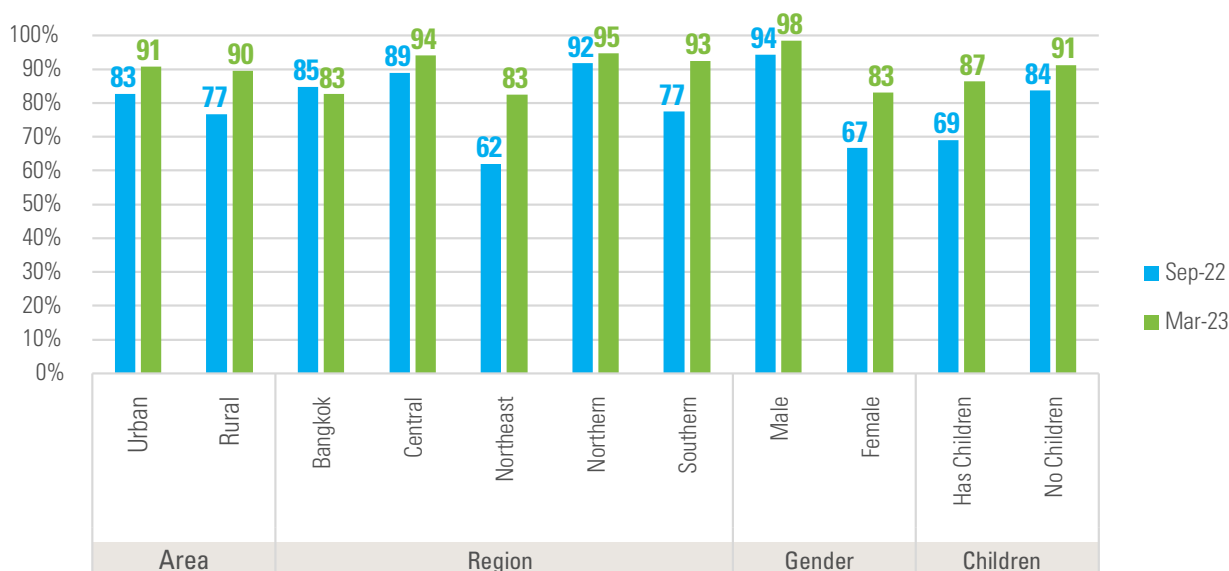


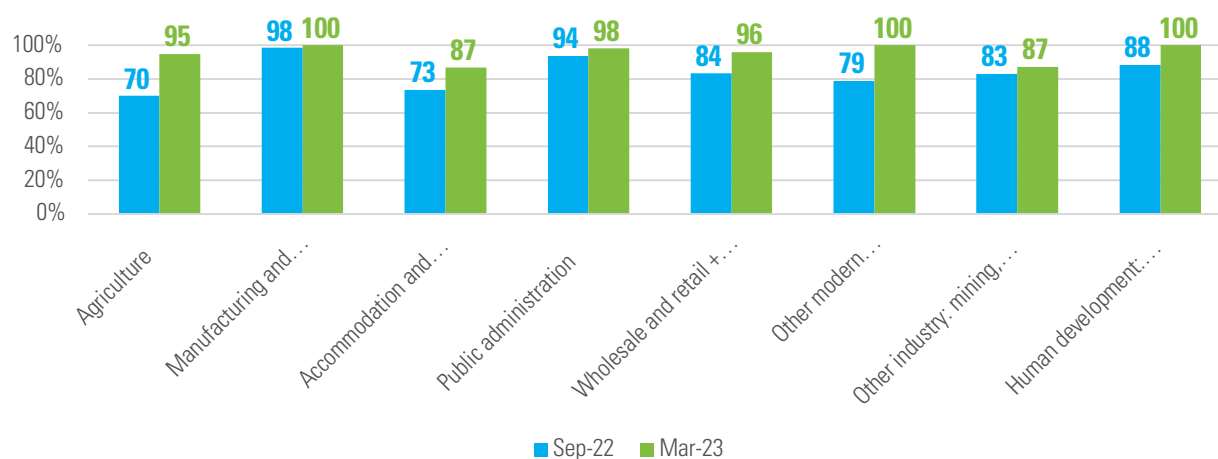
Table 2. Proportion of respondents who started working again after losing their job or business as a result of COVID-19, %, for households with and without children, Rounds 1 and 2

| | September 2022 | March 2023 | Change in percentage points |
|----------------------|----------------|------------|-----------------------------|
| No children | 84% | 91% | +7 |
| With children | 69% | 87% | +18 |

In September 2022, the return-to-work rates for the Northeast and Southern regions lagged behind other regions, with 62 per cent and 77 per cent of respondents returning to work respectively, and additional differences across urban (83 per cent) and rural (77 per cent) households. However, the situation had improved by March 2023, with return-to-work rates increasing to 83 per cent in the Northeast and 93 per cent in the Southern region, and both urban (91 per cent) and rural (90 per cent) areas. Additionally, female respondents reported a positive dynamic regarding returning to work, increasing from 67 per cent in Round 1 to 83 per cent in Round 2, though female rates still lagged behind male respondents who saw an increase from 94 per cent to 98 per cent. As expected, for respondents who did not work in the week in which the surveys took place, fewer were sick with COVID-19 or in quarantine in March 2023 (3 per cent) compared to September 2022 (13 per cent).

The reemployment rate following job loss during the COVID-19 pandemic showed significant improvement across various sectors, notably in the agricultural sector (from 70 per cent to 95 per cent) and accommodation and food services (from 73 per cent to 87 per cent), as illustrated in Figure 7. These results are in line with NESDC report, demonstrating the expansion of agriculture, forestry and fishing by 3.6 per cent from a 2.2 per cent contraction in the previous quarter, and a continued increase of accommodation and food services activities by 30.6 per cent.⁶

Figure 7. Proportion of respondents who started working again after losing their job or business as a result of COVID-19, %, by sector



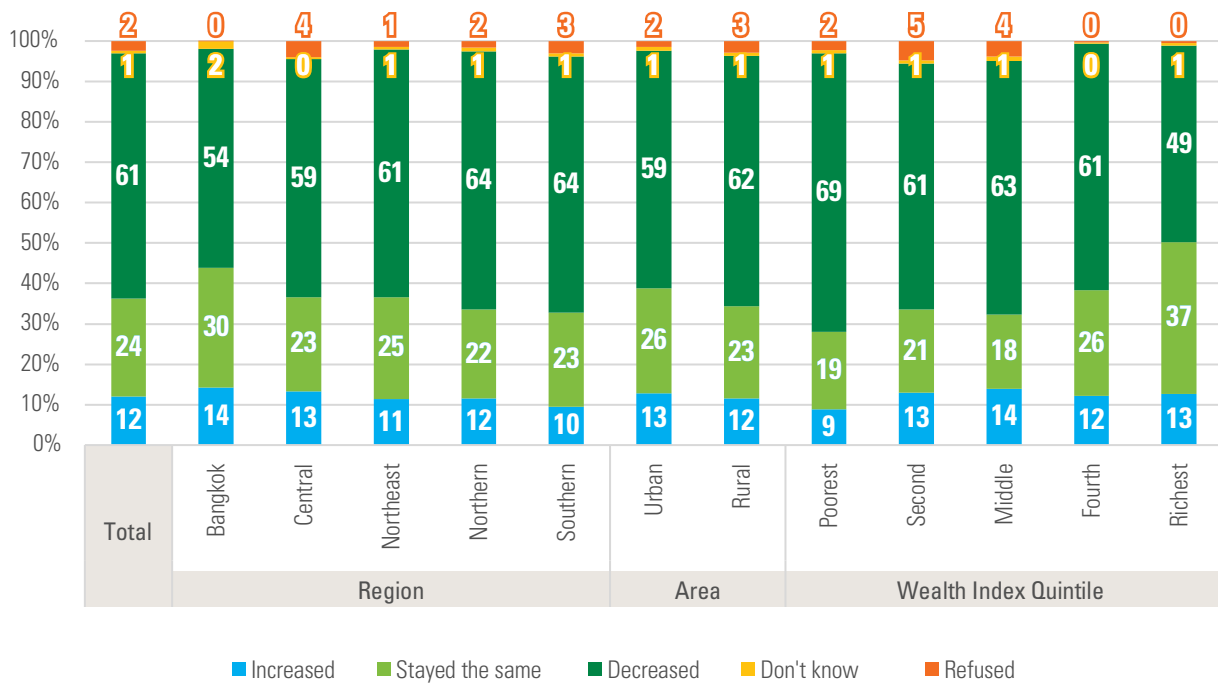
⁶ NESDC. (2022). Thai Economic Performance in Q4 of 2022 and the Outlook for 2023.

Other findings which are worth mentioning:

- **Home/office work modality:** In September 2022, 43 per cent of respondents reported working from the office, with 34 per cent working from home, and another 17 per cent in a hybrid situation. By March 2023, there had been little change, implying that the changes in work modality resulting from the post-COVID-19 recovery had persisted.
- **E-commerce business:** A total of 8 per cent of respondents indicated in Round 2 that they worked in e-commerce or digital services. Of these, 34 per cent had entered the sector after the COVID-19 pandemic.

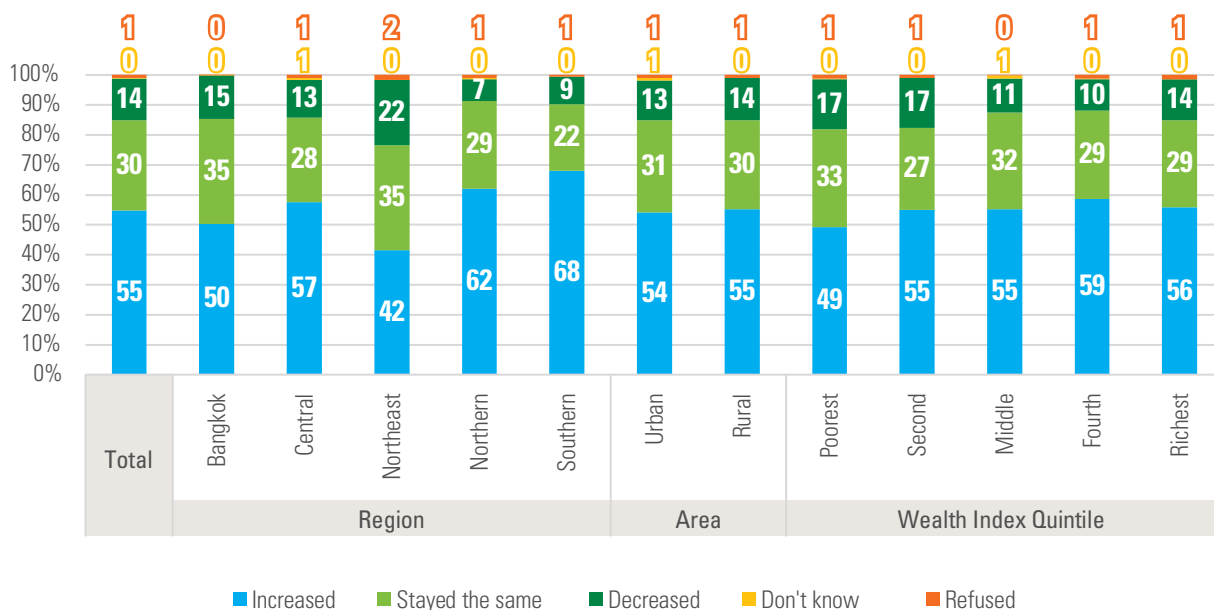
Income: The Round 2 findings suggested a complete reversal of the previous income trend, with the majority of respondents indicating an income increase: in March 2023, 55 per cent of respondents indicated that household income had increased over the last year, compared to 12 per cent in September 2022. Households reported a large positive change across all demographic strata and household composition.⁷ Please see Figures 11 and 12.

Figure 11. Status of current household income in a typical month compared to a year ago, %, September 2022



⁷ These findings are aligned with general increase of private consumption, which expanded at a rate of 5.7 per cent (NESDC, Q4, 2022).

Figure 12. Status of current household income in a typical month compared to a year ago, %, March 2023



While the data indicates overall recovery of household income, there are some variations between groups.

For example, male respondents were more likely than females to report increased household income (by 12 percentage points). Additionally, just 42 per cent of respondents in the Northeast region reported increased household income in March 2023, lagging behind other regions, such as Bangkok (50 per cent) and the Southern region (68 per cent). Though the Northeast reported less incidence of increased income, 35 per cent of respondents in the region also reported no change. This represents a marked improvement from round 1 where just 11 per cent of respondents in the Northeast region reported an increase and the majority of 61 per cent reported a decrease.

Reported increases in incomes were substantial, with 49 per cent of respondents noting that the increase was about half or more than half of their monthly income. **In terms of farm and non-farm businesses the trend was similarly positive, indicating overall improvement in March 2023 compared to 12 months ago, with the majority reporting stable income** (please see Figures 13 and 14).

Figure 13. Status of current farm and non-farm income compared to 12 months ago, %, September 2022

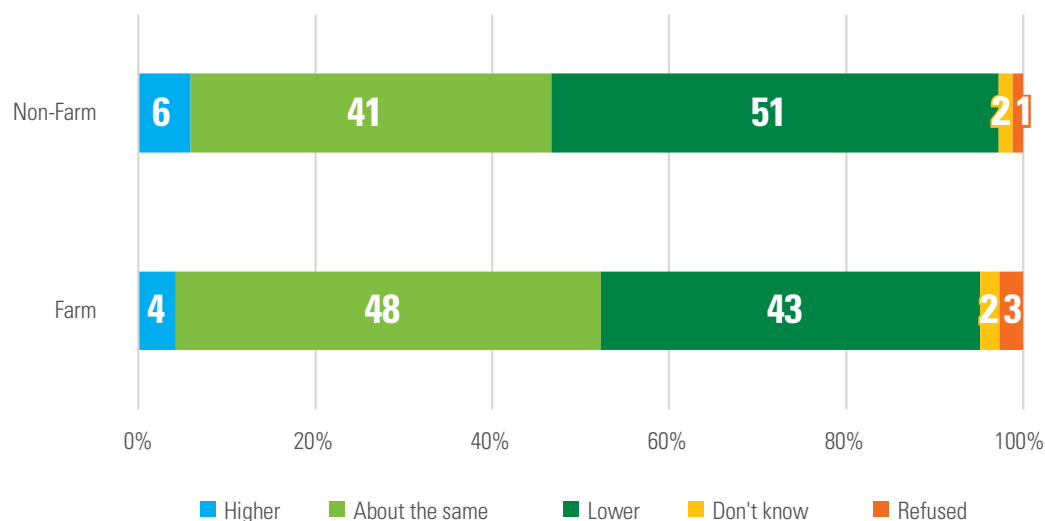
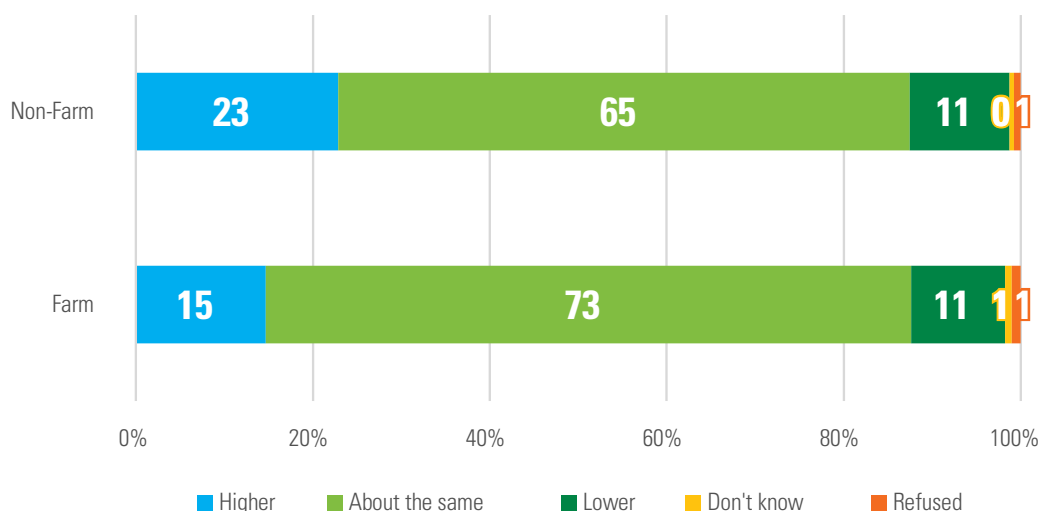


Figure 14. Status of current farm and non-farm income compared to 12 months ago, %, March 2023



In Round 2, a significant proportion of respondents reported stable income in their household farms and non-farm businesses over the past 12 months. Specifically, 73 per cent of those with household farms and 65 per cent of those with non-farm businesses indicated that their income remained unchanged. However, variations were observed across regions, with Central and Northeastern farms reporting the highest proportion of decreased income (17 per cent and 10 per cent respectively). Similarly, 17 per cent of non-farm businesses in the Northeastern region and 14 per cent in Bangkok reported a decline in income during the same period. These findings demonstrated an improvement from the first round, where 43 per cent of households with farms and 51 per cent of households with non-farm businesses reported reduced income compared to the previous year.

2



Childcare

Care (especially childcare) obligations persisted as a critical obstacle to labour market participation. Of those who did not have paid jobs in March 2023, 20 per cent indicated that they had to care for children, while 6 per cent had to care for ill relatives. Care obligations were identified as a key hurdle to employment across both rounds (see Table 3).

Table 3. Proportion of respondents who stated care obligations as a reason for not working, %, Rounds 1 and 2

| | September 2022 | March 2023 |
|--------------------------------------|----------------|------------|
| Need to care for ill relative | 6% | 6% |
| Need to care for children | 17% | 20% |

In the Northeast, the number of households that had to miss work due to childcare obligations reached 28 per cent. The survey also revealed significant differences between rural and urban families (28 per cent versus 10 per cent respectively), and between genders: 4 per cent of men indicated childcare as a reason for not working, while around 22 per cent of women were not working because of childcare obligations. Wealth was also a key factor: 27 per cent of the poorest wealth quintile indicated that childcare needs were a key reason for not working, while among the richest quintile the proportion was significantly lower (13 per cent).

Figure 8. Proportion of respondents who indicated need to care for children as a reason for not having a paid job in the last 7 days, %, March 2023

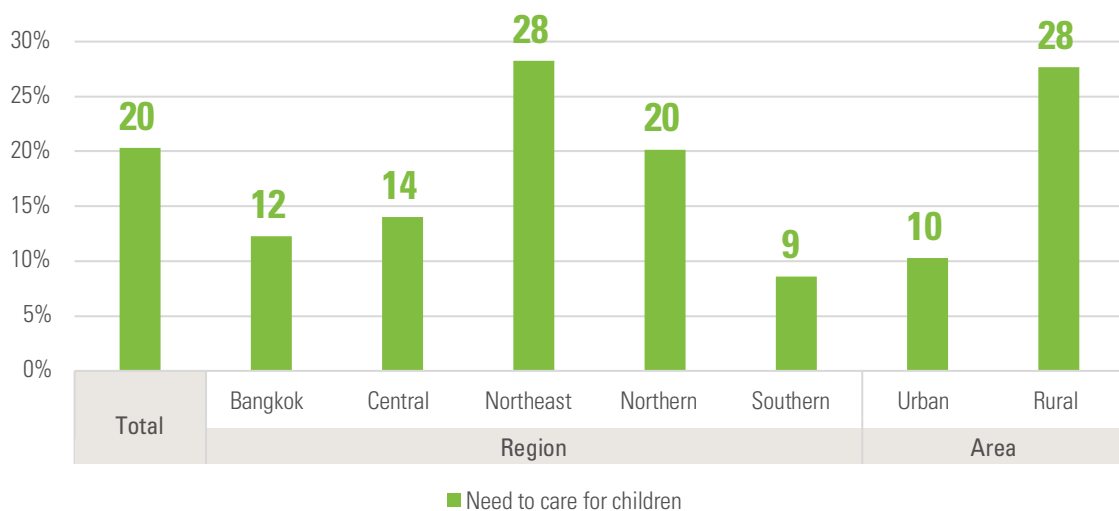
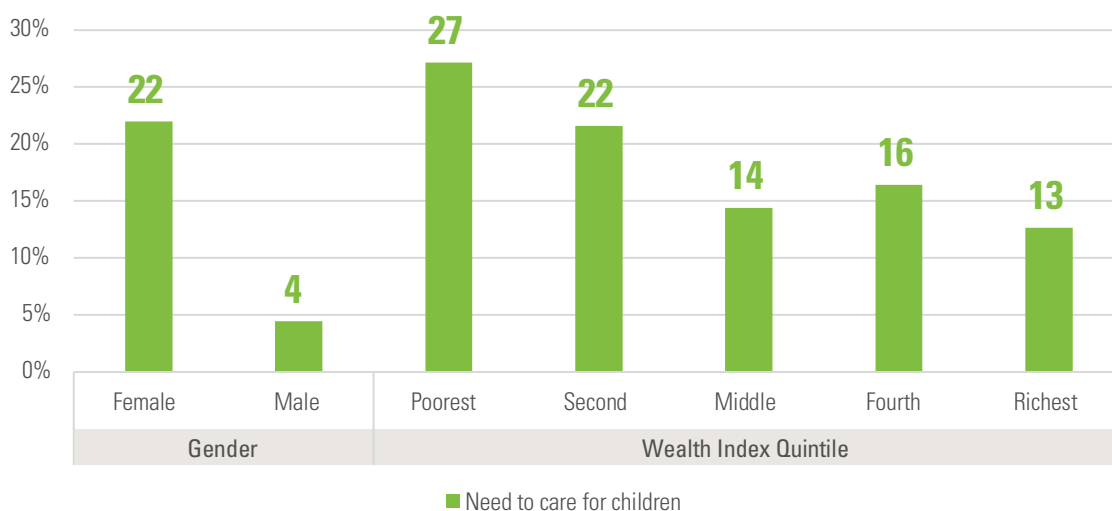


Figure 9. Proportion of respondents who indicated need to care for children as a reason for not having a paid job in the last 7 days, %, March 2023



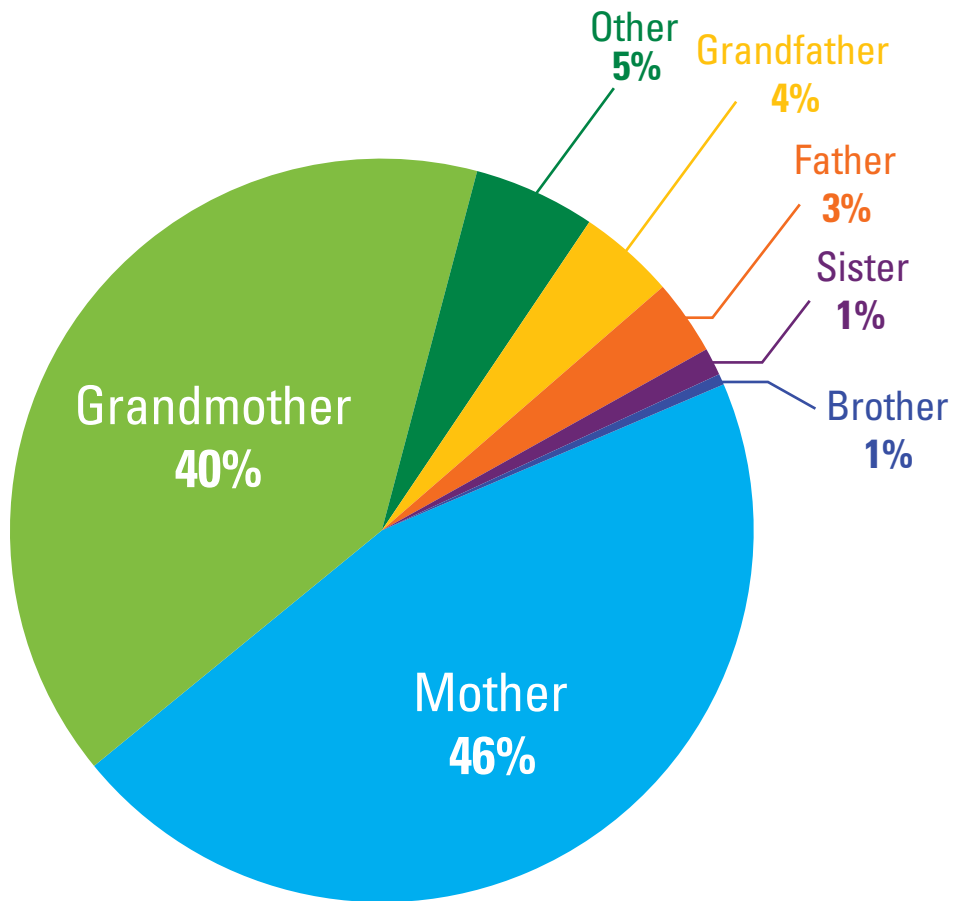
Out of those who indicated caring for children as the main reason for not working, **37 per cent said that they did not use childcare services because they were too expensive.** The expense of childcare services was a more significant factor for those in the Northeast (48 per cent), in rural areas (41 per cent), among respondent with lower education level (60 per cent) and among the poorest (44 per cent).

For some respondents, childcare was a critical issue, with 5 per cent noting that a child aged 0-6 years had been **left alone or under the supervision of another child** younger than 10 years of age for more than 1 hour at least once in the last week.

Another 10 per cent of respondents with children aged 0-6 years reported **having to take their child to work 'often' or 'sometimes'** due to a lack of other childcare options since the beginning of COVID-19, indicating that parents are in need of solutions to help them balance childcare and the demands of work.

The Round 2 findings also showed that women were responsible for most of the unpaid care obligations relating to care of young children. When households with children aged 0-6 years were asked which family member mainly provided childcare when preschools and kindergartens were closed during COVID-19, female members were significantly more likely to take on childcare responsibilities compared to male members. Mothers were the main care providers in 46 per cent of cases, and grandmothers in 40 per cent of cases; while for men, fathers took on childcare in 3 per cent of cases, and grandfathers in 4 per cent of cases.

Figure 10. Main childcare providers for children 0-6 years when preschools were closed due to COVID-19, March 2023



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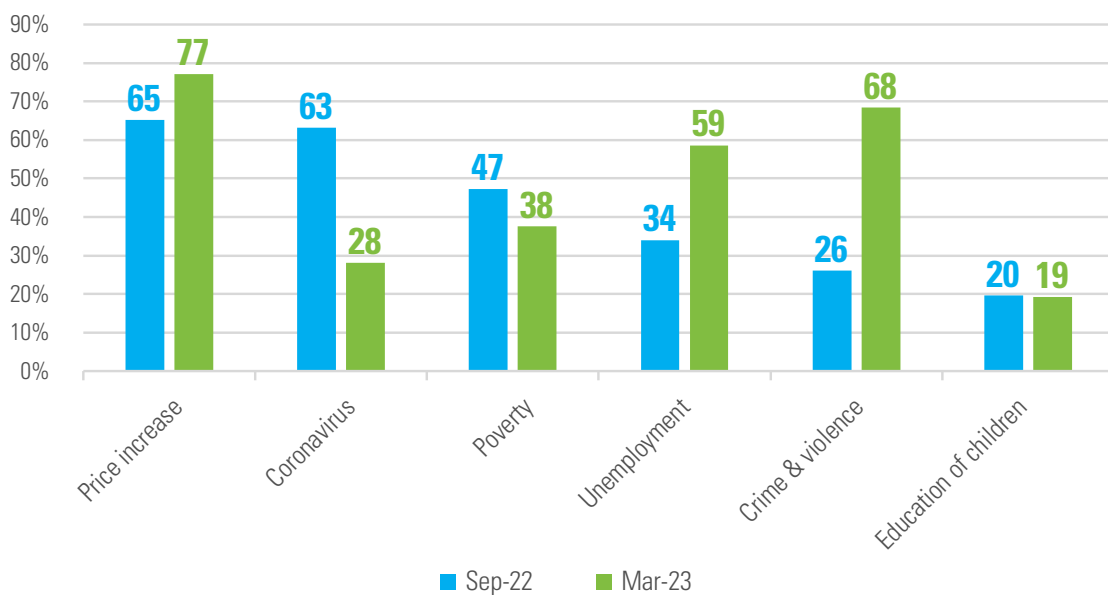


Issues worrying people

When people were asked about their top three issues of concern, price increases retained the top position as the most worrying issue in both rounds. However, the second and third issues changed. In September 2022, the top three problems indicated by respondents were price increase (65 per cent), COVID-19 (63 per cent) and poverty (47 per cent), while **in March 2023, the top three problems were price increase (77 per cent), crime and violence (68 per cent) and unemployment (59 per cent).**

The share of people who highlighted COVID-19 as one of the top issues decreased significantly from 63 per cent to 28 per cent, suggesting that COVID-19 no longer remains a pressing concern for people. However, unemployment and crime and violence increased in relevance, with crime and violence making the steepest rise from 26 per cent to 68 per cent (see Figure 15).

Figure 15. Most ‘worrying’ topics for households (respondents selected up to 3 options), %, Rounds 1 and 2



There were some variations across demographic groups, for example female respondents were more likely to list unemployment as a concern than males (64 per cent compared to 56 per cent) and were less likely to select COVID-19 as a problem (21 per cent to 32 per cent). Households in the Northern and Northeast regions saw higher instances of respondents selecting COVID-19 as a concern, at 39 per cent and 32 per cent respectively. Respondents from the Northeast and from the poorest income quintile were also more likely to select poverty as a key concern, at 49 per cent and 52 per cent respectively. Unsurprisingly, ‘education of children’ was selected as a concern more often by households with children (30 per cent) than those without (12 per cent).

Inflation, while remaining a problem, seems to have become less critical in March 2023 compared to September 2022. When asked how much price increases threatened household finances in March 2023, 26 per cent indicated it as a ‘substantial threat’, which is 21 percentage points lower than the results reported in September 2022 (47 per cent). Please see Figures 16 and 17.

Figure 16. Level of threat of price increase to household finances, %, September 2022

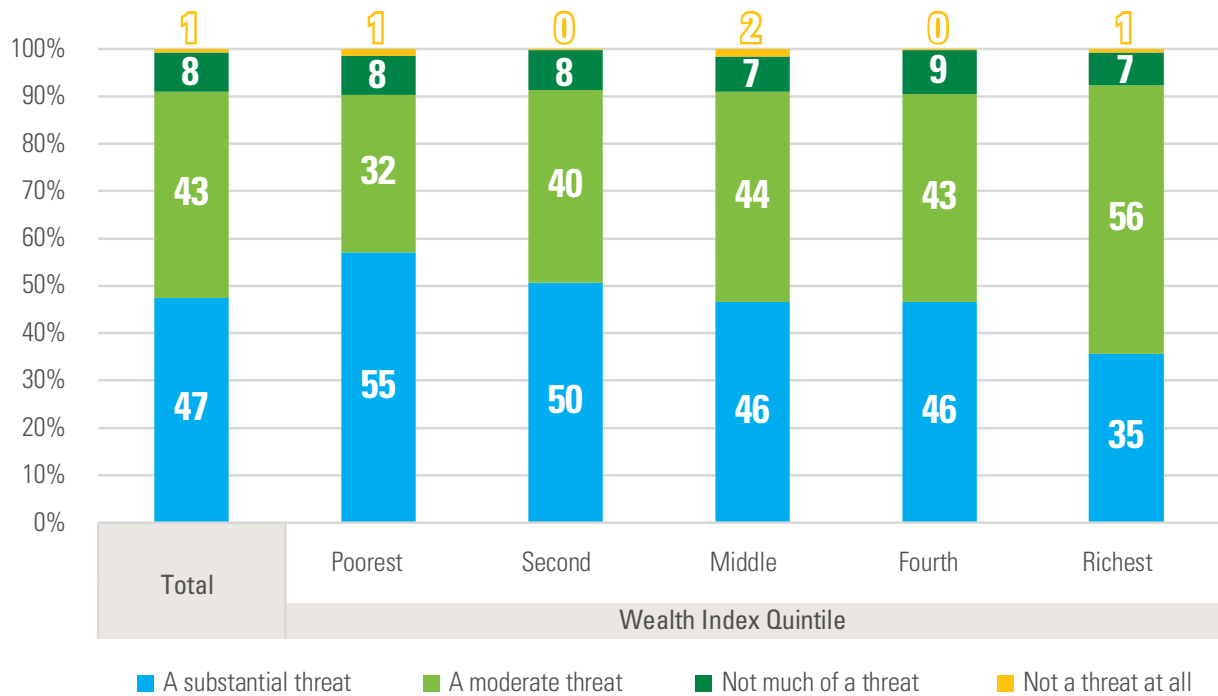
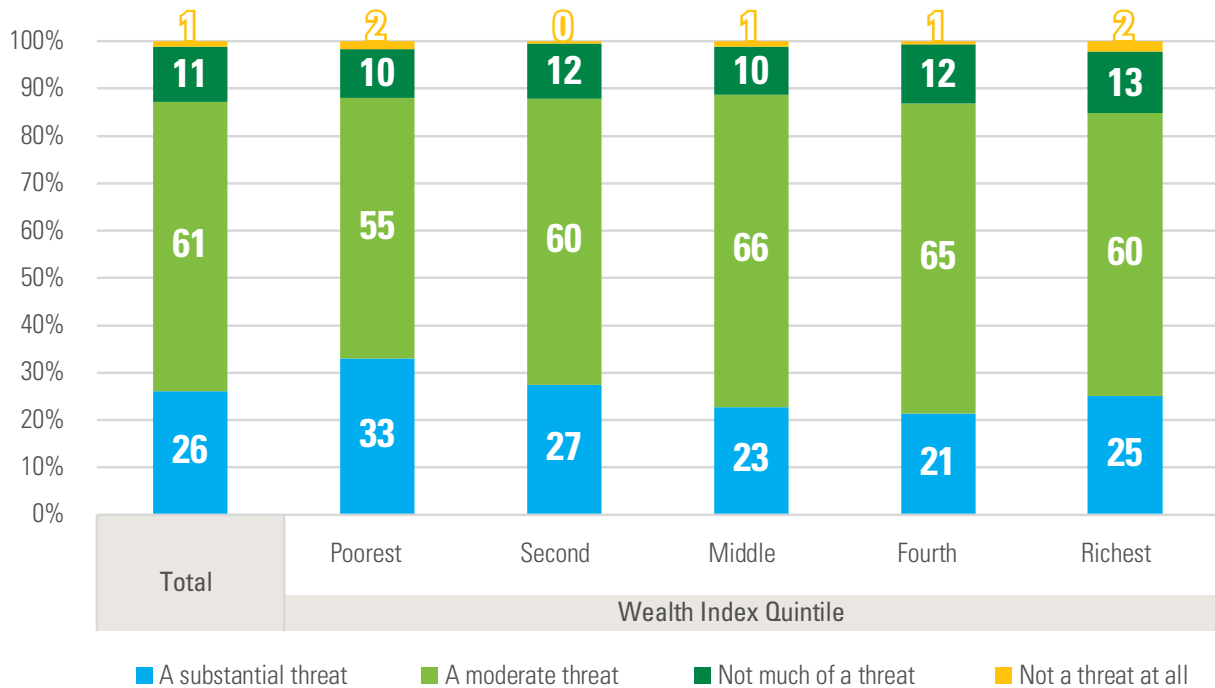


Figure 17. Level of threat of price increase to household finances, %, March 2023



4



Coping strategies

Households used a large variety of coping techniques to survive and mitigate the shocks brought about by the COVID-19 pandemic. While reducing food consumption or buying cheaper food items was a predominant strategy in September 2022 (51 per cent), this strategy became less utilized by households in March 2023 (27 per cent). This is generally considered a positive sign as its decline is aligned with the improved employment and income findings of the survey. **Reducing non-food consumption or shifting to cheaper non-food items remained the top coping strategy,** however, with a slight decline observed in March 2023 (50 per cent) compared to September 2022 (52 per cent). Please see Table 4.

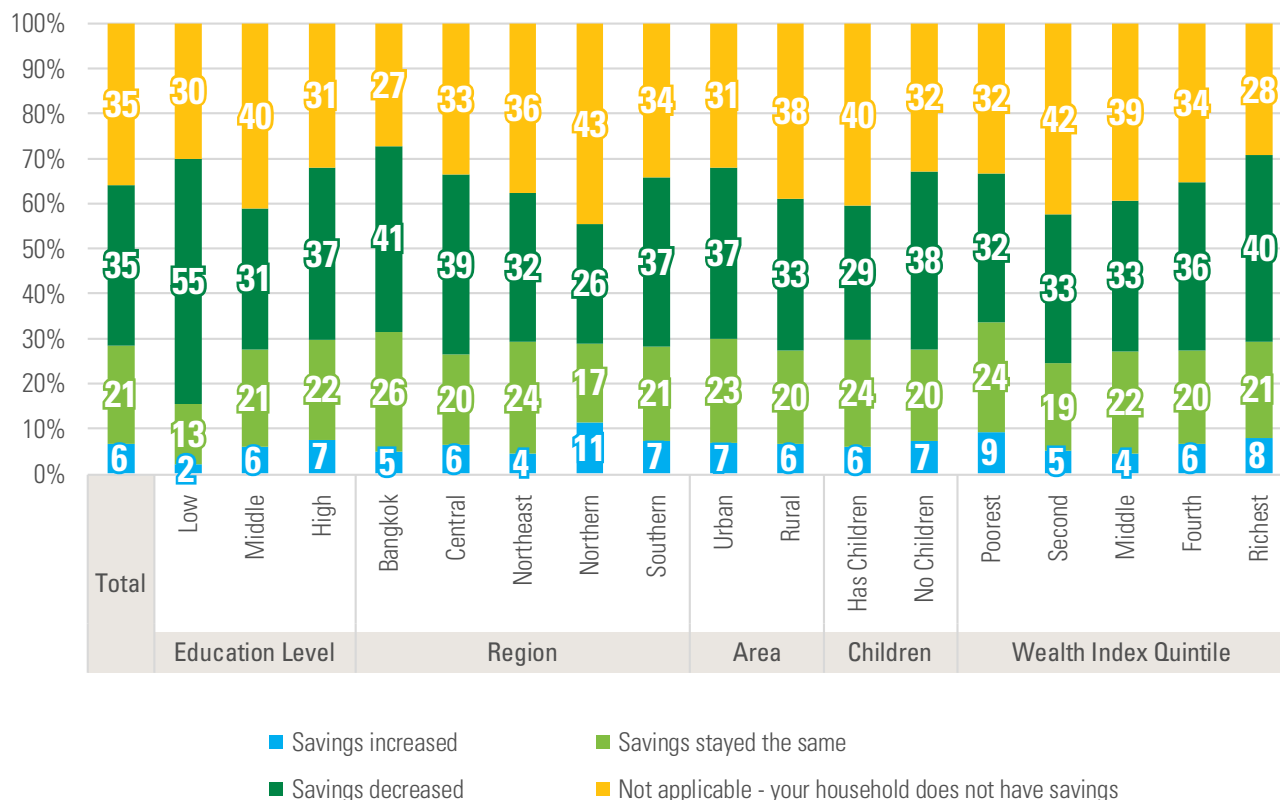
Table 4. Top coping strategies, % of respondents, September 2022 and March 2023

| Top Coping Strategies | Sep-22 | Mar-23 |
|---|--------|--------|
| Reduced non-food consumption or shift to cheaper non-food items | 52% | 50% |
| Reduced food consumption or shift to cheaper food items | 51% | 27% |
| Relied on savings | 39% | 34% |
| Received assistance from government | 29% | 37% |
| Delayed payment obligations | 24% | 36% |
| Borrowed from friends and family | 24% | 35% |
| Received assistance from friends and family | 23% | 24% |
| Took a loan from a financial institution/ such as a bank | 21% | 40% |

The government was an important source of support across population groups for both rounds. The percentage of those who relied on government assistance to cope with shocks was 29 per cent in September 2022, increasing to 37 per cent in March 2023.

While savings remained one of the main coping strategies, the percentage of respondents who relied on savings declined slightly between the two surveys (from 39 per cent in Round 1 to 34 per cent in Round 2). When asked if the amount of household savings had changed in the past six months, 35 per cent of respondents reported that their savings had decreased compared to six months ago, with 21 per cent reporting no change and just 6 per cent indicating that their savings had increased. An additional 35 per cent of respondents indicated that the question was not applicable as their household did not have any savings at all. In total, about **70 per cent of all households across regions, household composition, gender, and urban/rural areas reported that their savings had either decreased over the last six months or were non-existent,** which is a concerning statistic that confirms the challenges associated with relying on savings as a coping strategy. Please see Figure 18.

Figure 18. Change in household savings, %, March 2023



Borrowing from banks and from friends increased between September 2022 and March 2023. Respondents in March 2023 were more likely to indicate that they took out a loan from a financial institution (40 per cent), rising from 21 per cent in September 2022. Borrowing from friends and family also increased while selling assets decreased, which may suggest that household assets have been used up to some extent and going into debt is becoming one of the only available strategies for some households.

Another significant finding that underscores the issue of debt is the rising percentage of households resorting to deferring payment obligations, which increased from 24 per cent to 36 per cent between Round 1 and Round 2. Notably, households with children were particularly affected, with 40 per cent of them reporting deferred payment obligations as of March 2023. Please see Figures 19 and 20.

These findings align with national data that revealed a high ratio of household debt to GDP in the third quarter of 2022. Specifically, the ratio stood at 86.8 per cent, representing a slight decrease from 88.1 per cent in the previous quarter, although it remains significantly elevated compared to the pre-pandemic level of 78.8 per cent in the same quarter of 2019.⁸ **An increase in households relying both on taking out loans and then delaying payment obligations represents a troubling trend for household finances across the country.**

8 NESDC. (2022). Thai Economic Performance in Q4 of 2022 and the Outlook for 2023.

Figure 19. Coping strategies reported by households with children and without children, %, September 2022

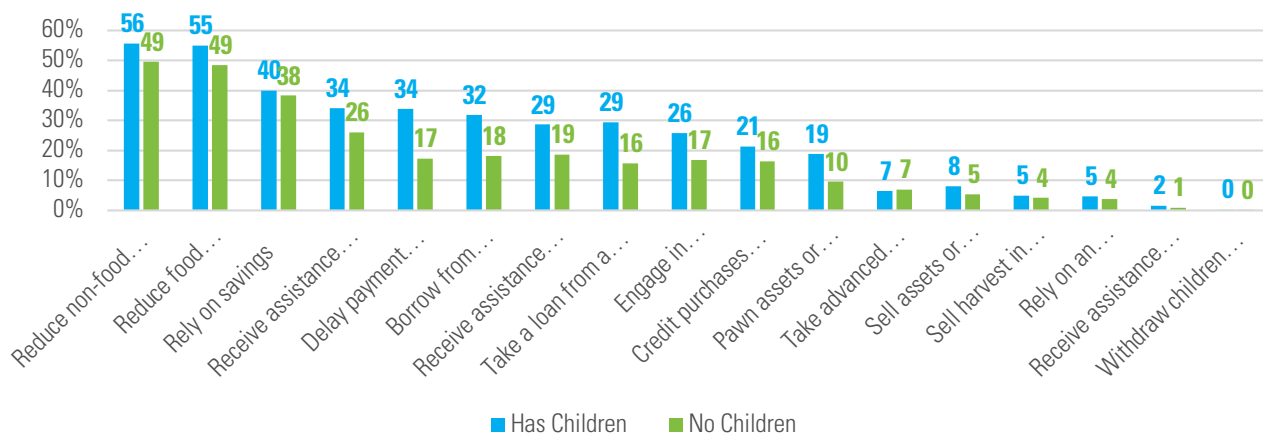
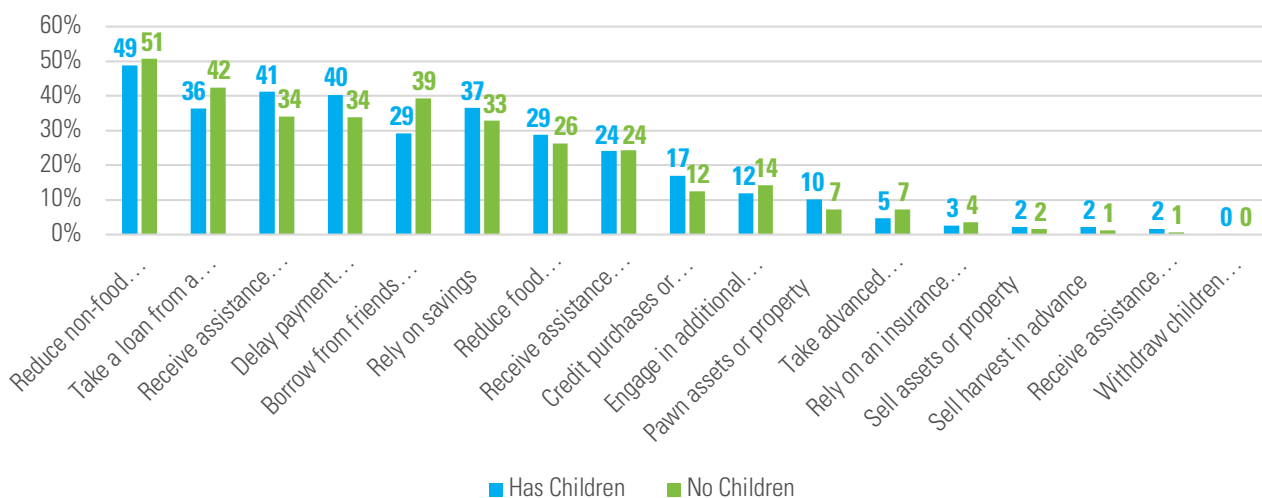


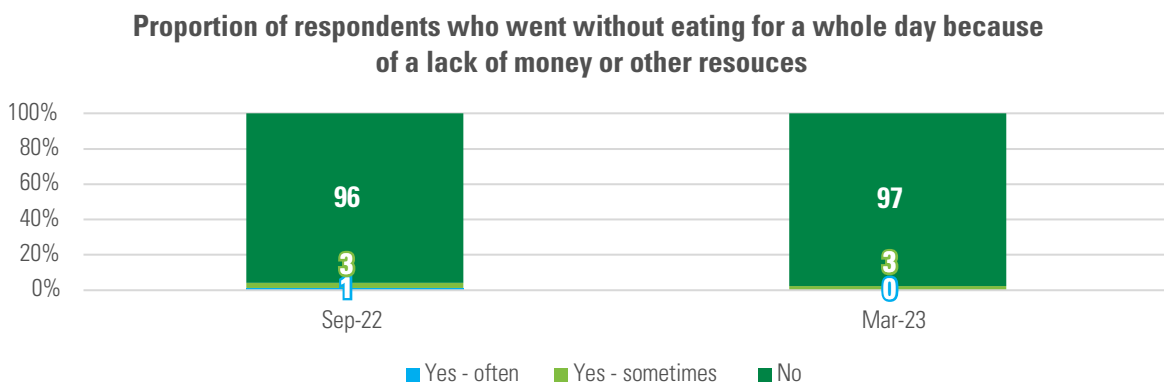
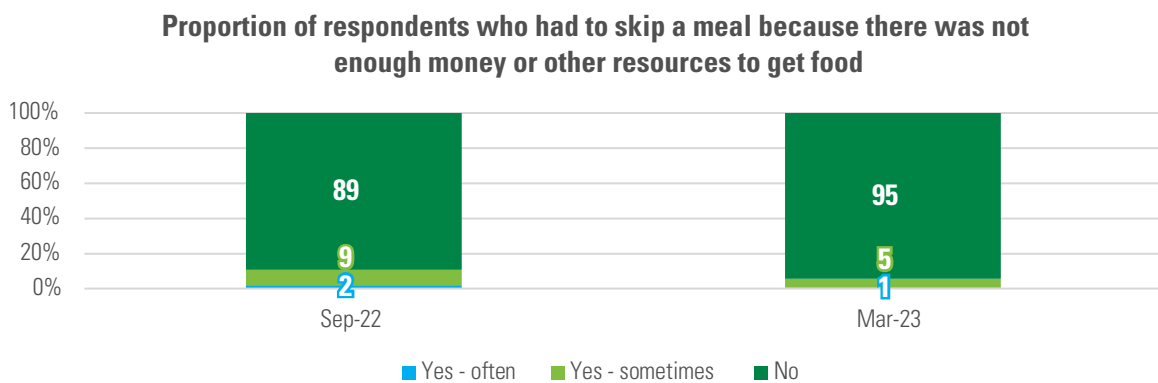
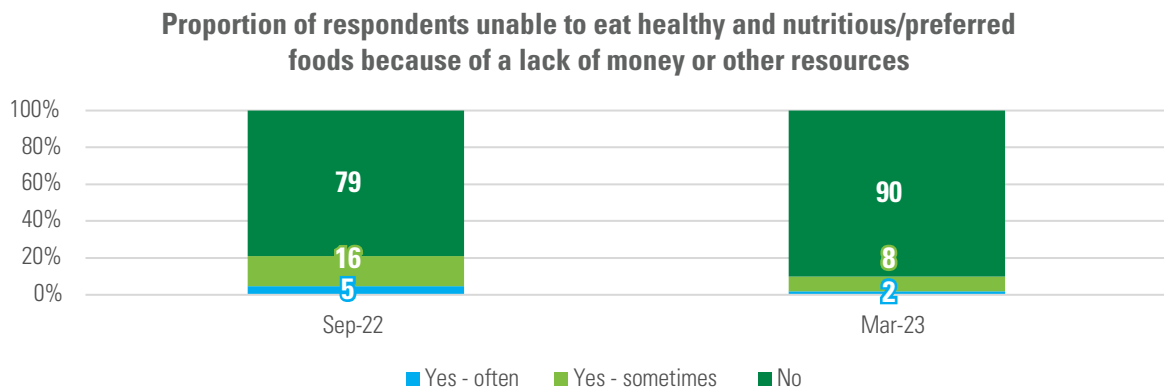
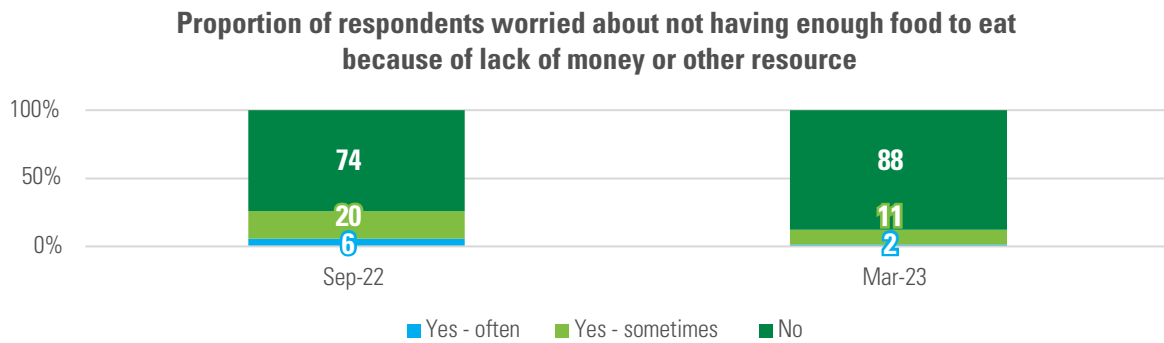
Figure 20. Coping strategies reported by households with children and without children, %, March 2023



Food security improved between March 2023 and September 2022 across all indicators. A majority of respondents in March 2023 (88 per cent) indicated that they had not worried about lack of food to eat due to lack of money or other resources over the last 30 days, an improvement since September 2022 (74 per cent).

In March 2023, 10 per cent of respondents reported that they were unable to eat healthy and nutritious/preferred foods because of a lack of money or other resources, a decrease from the 21 per cent observed back in September 2022. The incidence of extreme food insecurity also improved. When asked “During the last 30 days, was there a time when you or another member of your household had to skip a meal because there was not enough money or other resources to get food?,” 6 per cent answered ‘often’ or ‘sometimes’, compared to 11 per cent in September 2022. Please see Figure 21 for a breakdown of key food security indicators.

Figure 21. Key food security indicators, %, September 2022 and March 2023

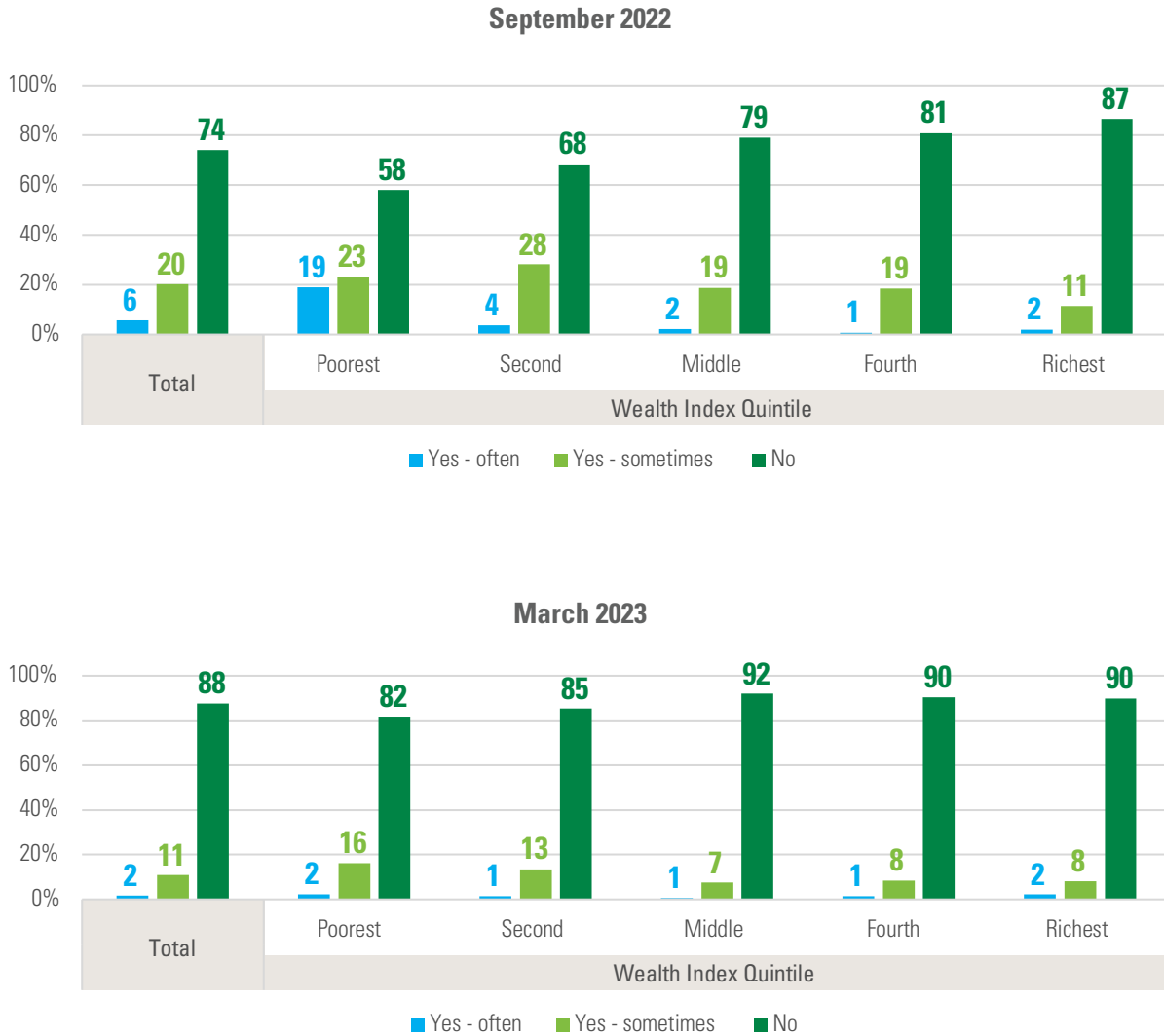


Although overall food security improved since September 2022, the situation for the poorest groups in March 2023 was notably more difficult compared to those in better-off quintiles. For example, while around 6 per cent in total indicated that there was a time when a household member had to skip a meal due to lack of money or other resources, for the poorest this percentage was 9 per cent. Similarly, around 13 per cent reported that they worried ('often' and 'sometimes') about not having enough food to eat because of lack of money or other resources. For the poorest, this percentage was 18 per cent. Please see Figures 22 and 23.

Figure 22. Proportion of respondents who had to skip a meal due to lack of money or other resources, %, September 2022 and March 2023



Figure 23. Proportion of respondents who worried about not having enough food to eat due to lack of money or other resources, %, September 2022 and March 2023



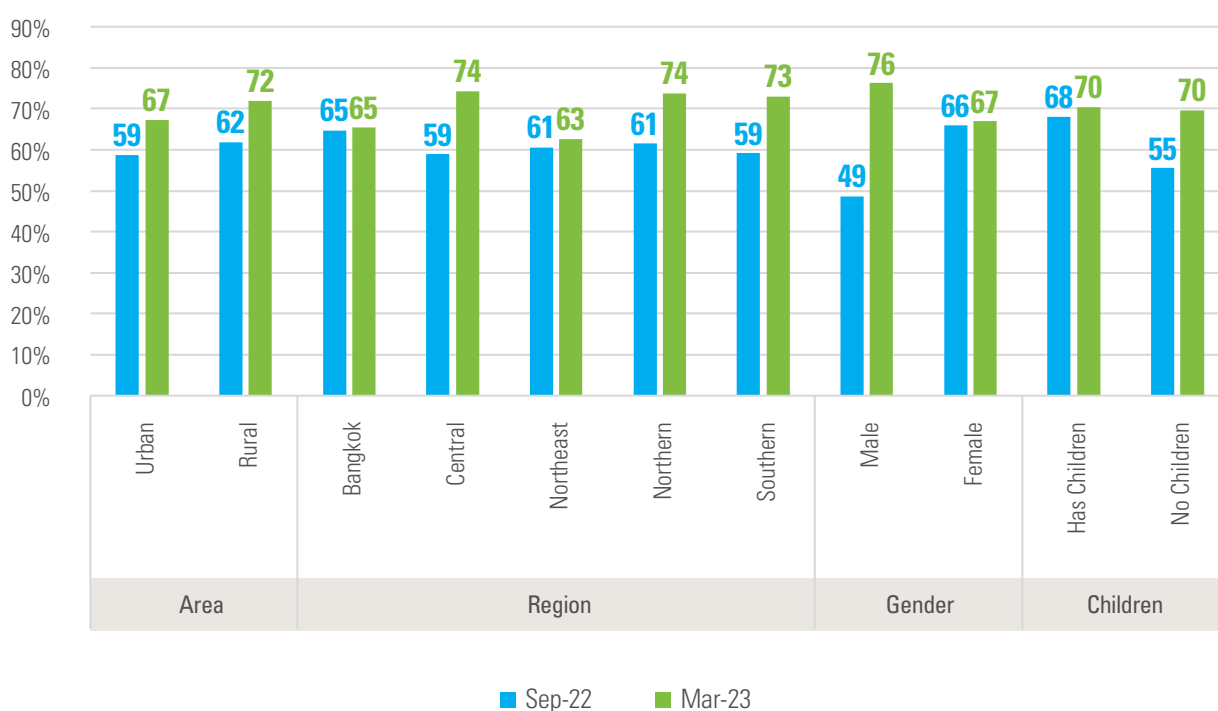
5



Social Assistance

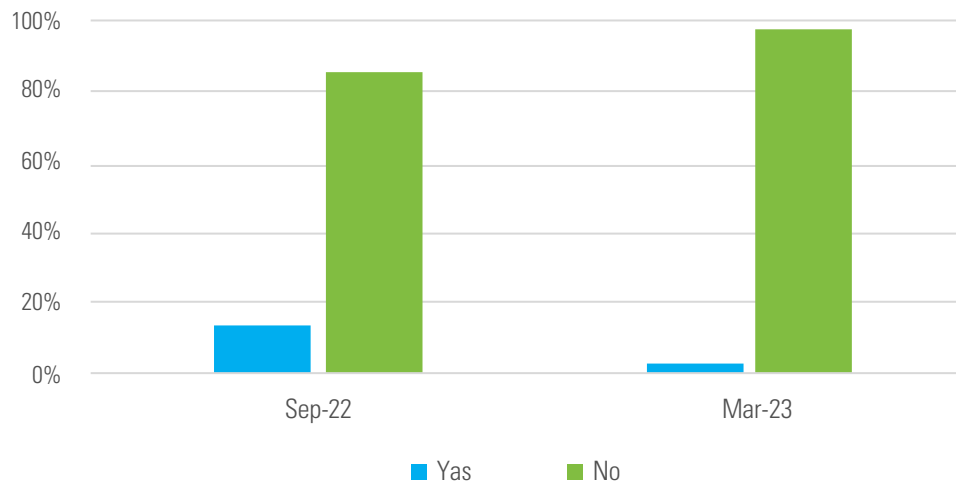
Around 70 per cent of households in March 2023 reported receiving social assistance from the government, compared to 60 per cent in September 2022. A larger share of households with no children reported receiving government assistance in Round 2 (70 per cent) than in Round 1 (55 per cent).

Figure 24 Proportion of households that received government assistance, %, by area, gender and household composition

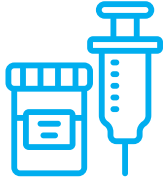


When asked about difficulties obtaining social assistance payments, only 2 per cent mentioned experiencing challenges, which is an improvement compared to September 2022 when 14 per cent reported problems (please see Figure 25).

Figure 25. Proportion of households that experienced any difficulties or problems while collecting or cashing out payments from government assistance programmes in the past 12 months, %, September 2022 and March 2023



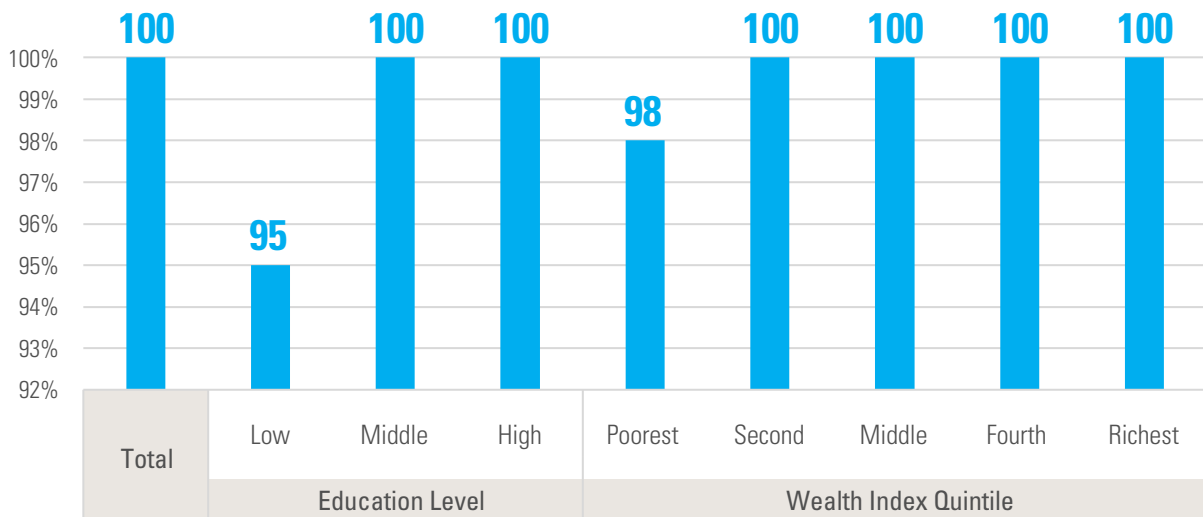
6



Health/Vaccination

In March 2023, almost 100 per cent of respondents reported that all adult members of their household had received at least two shots of the COVID-19 vaccine at the time of the survey, slightly up from the 98 per cent reported in Round 1, indicating that vaccination uptake is very high. **These results are similar across all demographic strata, regions, and gender**, with the exception of the lowest education level group and the poorest which had a 95 per cent and 98 per cent rate of respondents reporting full household vaccination, respectively. Please see Figure 26.

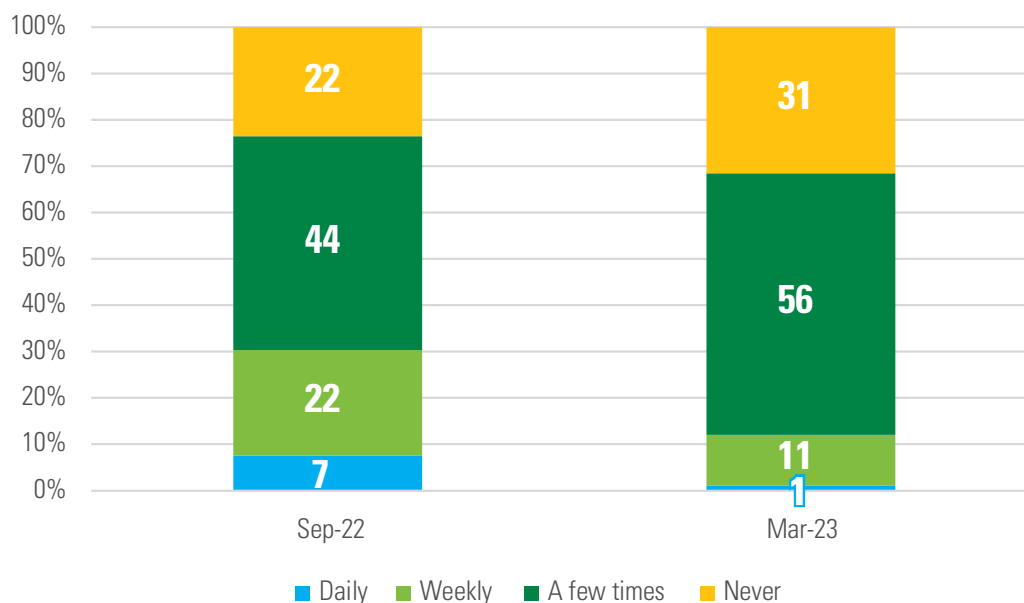
Figure 26. Proportion of households where all adult members of the household received at least two shots of vaccine against COVID-19 in March 2023, %



The survey results indicated good overall access to medical services over the last 12 months (including regular check-up services and vaccination), both for adults (98 per cent) and children (99 per cent). These results are relatively homogenous for both poorer and wealthier quintiles.

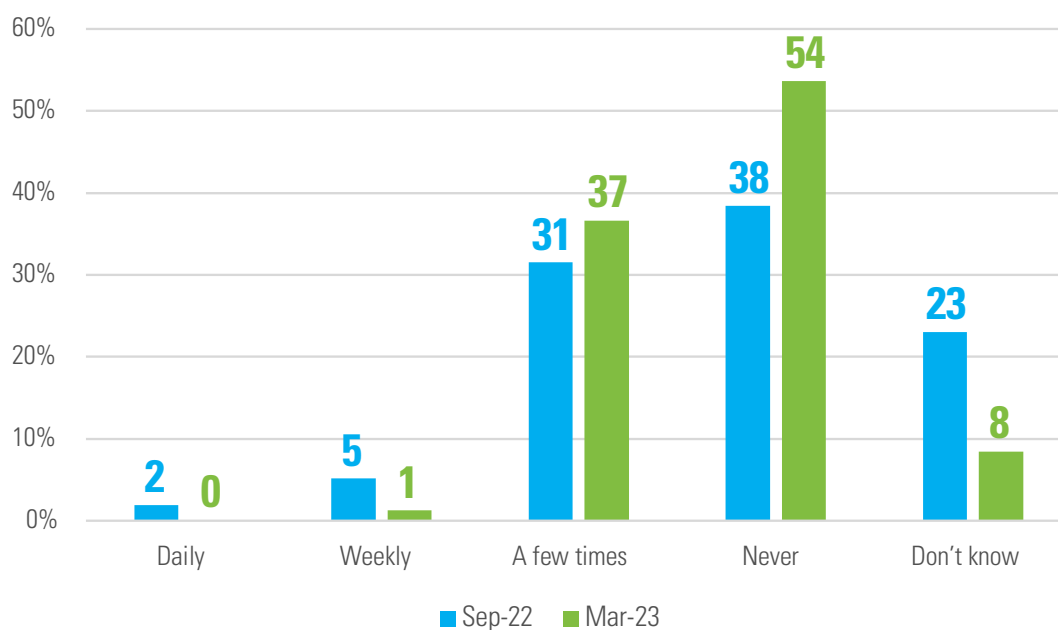
Mental health remained a concern for households in general. However, when asked about how often respondents felt anxious, nervous or worried, the number of people who answered 'never' increased from 22 per cent in September 2022 to 31 per cent in March 2023. In March 2023, only 12 per cent indicated feeling anxious, nervous or worried 'daily or weekly', a decrease from the 29 per cent observed in September 2022. Please see Figure 27.

Figure 27. Proportion of respondents feeling anxious, nervous or worried, %, September 2022 and March 2023



For children aged between 7-17 years, the proportion who said they never felt anxious, nervous, or worried in March 2023 also increased compared to September 2022 (54 per cent versus 38 per cent respectively). Please see Figure 28.

Figure 28. Proportion of children ages 7-17 feeling anxious, nervous or worried, %, September 2022 and March 2023



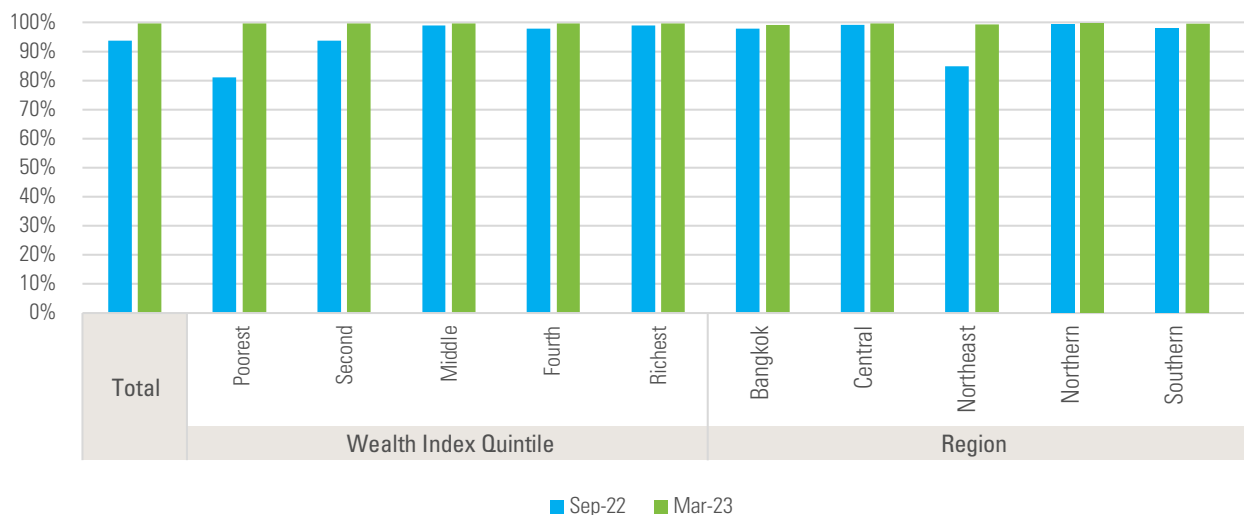
7



Education

During the first round in September 2022, 94 per cent of households indicated that their children returned to school when schools reopened. However, this percentage was lower in the Northeast region, at 84 per cent. Among the poorest quintile, the proportion was even lower, with 81 per cent returning to school. All households which answered that none of their children returned to school when the school reopened were from the Northeast and the two lowest income quintiles. **During the second round in March 2023, however, these areas had caught up, with nearly 100 per cent of respondents across all strata reporting that children had returned to school.**

Figure 29. Proportion of children aged 7-17 years who were in school before COVID-19 and returned to school when it reopened, %, September 2022 and March 2023



In Round 2, a majority (94 per cent) of respondents with children aged 7-17 years reported that their children had no difficulties catching up on learning after returning to school (see Figure 30). When asked how the students felt about returning to school, Round 2 also encouragingly recorded that around 81 per cent of students were happy to see teachers and friends, and 49 per cent were ‘excited and eager to get back to face-to-face learning’ (see Figure 31).

Figure 30. Proportion whose children ages 7-17 had difficulties catching up on learning after going back to school after COVID-19

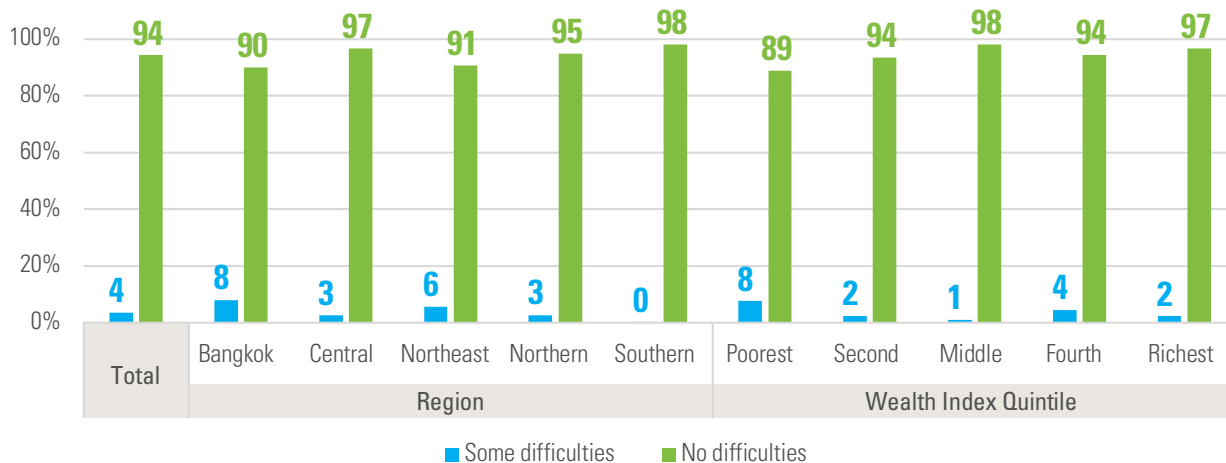
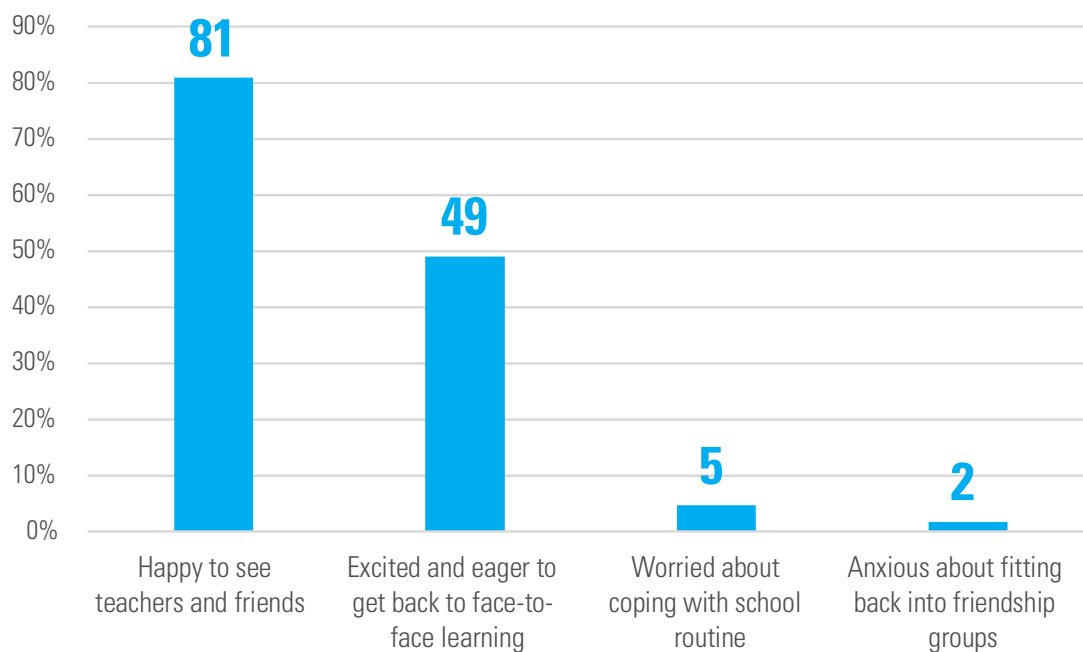


Figure 31. Proportion of children ages 7-17 on how they felt about returning to school, reported by adults, %, March 2023





Conclusion

Results from Round 2 (March 2023) demonstrated an overall positive trend compared to Round 1 (September 2022), including across key indicators relating to work, income and education. Specifically, the labour situation in March 2023 reflected general recovery, with many people returning to work after losing their jobs, and many groups previously lagging behind in September 2022 now 'catching up'. Despite this, several groups found it more difficult to start working again. The findings from Round 2 suggested a complete reversal of the previous negative income trend, with the majority of respondents indicating an income increase, although the Northeast still lagged behind other regions in this regard. However, most respondents also reported receiving social assistance from the government, and findings in March 2023 noted an improvement in access to benefits. Improvements in accessing education were also found. While in September 2022 94 per cent of respondents indicated that their children returned to school when the school reopened, in March 2023, nearly 100 per cent of respondents across all strata reported that children had returned to school and were also considering sending children to school next semester.

Despite these positive developments, several issues persist which warrant particular attention and remedial action:

- **Price increases:** When asked about their top three concerns, respondents consistently ranked price increases as the most worrying issue over the past six months. This is especially true for families in the poorest quintile, where the risk of food insecurity remains. This persistent concern indicates that, despite income increases, addressing inflationary pressures remains a pressing challenge.
- **Pockets of vulnerabilities and difficulty returning to work:** The recovery of labour market prospects in the Northeastern provinces has been relatively slow compared to the overall average. Additionally, individuals with dependents (especially children), those in the poorest quintile, and those with lower levels of education reported difficulties in returning to work, highlighting the need for policy interventions.
- **Debt burden:** The issue of debt remains a significant problem for many households, particularly those in the poorest quintile. Notably, there has been an increase in borrowing from banks and friends in 2023. Furthermore, the percentage of households resorting to delaying payment obligations rose from 24 per cent in September 2022 to 36 per cent in March 2023. Families with children have been particularly affected, with 40 per cent reporting deferred payment obligations as of March 2023. This underscores the need for effective debt management strategies and financial support for vulnerable households.
- **Childcare crisis:** The care crisis emerged as a crucial obstacle to employment during both survey rounds. Of those who did not have paid jobs in March 2023, 20 per cent indicated that this was due to needing to care for children, while 6 per cent had to care for ill relatives. Women disproportionately shoulder the burden of unpaid care obligations for young children, while the cost of childcare is also prohibitive for many families. Addressing the childcare crisis is therefore imperative to facilitate increased workforce participation, alleviate gender disparities and ensure early childhood development.



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