

达曼互动 零售消息月刊

世代

GEN X

Y ▶



成长最快的消费群体



世代

【零售业者是否已经准备好对应全球成长最迅速的消费群体】



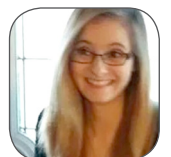
我们之中的大多数人都认识这样的一些青少年，他们似乎总是戴着耳机，一只手用智能手机发短信，另一只手用平板电脑查看朋友最新的 Instagram 照片。这一群体就是“Z 世代”。这一代 1995 年后出生的群体是时时刻刻保持社交联系、同时进行多项活动、熟悉科技的改良派，他们正准备彻底颠覆零售业。



Z 世代是全球增长最迅速的消费群体 — 占美国总人口逾四分之一。并且人们很快便清楚地认识到，他们在消费观念上并非盲目追随前几代消费群体的脚步。要满足 Z 世代的需求 — 未来服务于购物者的零售商和品牌需要立即着手做好准备。

真正的问题已经不在于 Z 世代是否会对零售市场产生影响 — 而是何时会产生。尽管 Z 世代的许多人甚至还未进入高中，却已成为一股非常可观的经济推动力。根据广告公司 JWT 的一份报告，超过 70% 的家长称其服装和家庭膳食方面的购买决定受到了 Z 世代子女的影响。

“我会 [与征求反馈的品牌或零售商进行互动]，因为他们主动联系的目的是为客户提供更优质的服务。” - Theresa U. (16 岁)



Z 世代

【19 岁及以下】

每 4 个人中有 3 个人关心人类对地球的影响

57% 的人更倾向于储蓄而非消费

8 秒：平均注意力持续时间

76% 的人使用 Instagram，但只有 45% 的人使用 Facebook

最忧虑的事：经济和未来就业前景

超过一半的家长称，在购买电子和娱乐产品方面，其子女也具有影响力。除了父母的钱包，再加上零用钱、兼职收入和储蓄与消费倾向，Z 世代已把持 440 亿美元的消费实力。

不仅如此，短短几年后，每 10 位消费者中就会有近 4 人来自 Z 世代 — 在未来 5 至 7 年，他们的购买力将呈指数级上升，成为全球单一和最大的消费群体。根据咨询公司 Strategy& 的数据，到 2020 年，Z 世代将在包括美国、欧洲、中国、印度、巴西和俄罗斯在内的全球最大市场占到总人口的 40%。

尽管距离这一时代的到来尚有几年的光景，如果零售商和品牌商现在就开始着手了解 Z 世代的喜好，便可以大大的提高成功的机会。我们也多次见证了，这几乎是每个新世代成主流为消费群体的必要举措。以千禧世代和 Apple 为例。Apple 在 20 世纪 90 年代和 21 世纪 00 年代通过引人注目的标志性商业广告而成名。这些广告更多侧重于宣传用户体验而非产品本身，获得了千禧世代的关注和青睐，这一群体容易为简单、真实的广告词所吸引。根据 CNBC 的一项调查，到 2012 年，千禧世代中 63% 的人 — 也就是说，每 3 个人中将近 2 个人 — 至少拥有 1 个 Apple 产品。

“[在选择店铺时]，我大多根据人们对店铺如何对待客户的评价进行选择。”

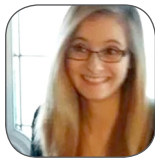
- CAITLIN P. (17 岁)



电子产品零售商 Best Buy 在 2009 年开发出“Twelpforce”时，也已对与数字原生代进行互动的潜在投资回报下了豪赌。Twelpforce 是一项当时非常独特的创新服务，通过 Twitter 免费提供实时技术支持。这项服务在千禧世代 — 第一个全面接纳社交媒体的世代 — 大受欢迎，树立起基于社交媒体客户服务计划理想模式的标杆。此外，预计 Best Buy 的销售额因此增加了 500 万美元，客户投诉率下降了 20%。（为体现不断变化的社交媒体环境，这项服务后来已过渡到新的平台。）

来源: Sparks & Honey, The Intelligence Group, Piper Jaffray, JWT

“我最喜欢的品牌是 FOREVER 21 和 DIVINE BY H&M, 因为它们总有特价商品出售。” - THERESA U. (16 岁)。



根据新世代习性调整市场战略而成功的品牌，并不仅仅止于零售商和快消品的品牌厂商。例如，Starbucks 通过以新理念推出咖啡店服务，直击 X 世代对个性、更高品质商品和社交氛围的需求，从 1986 年西雅图一个只有 4 个店面的小型咖啡烘焙商，发展成门店数量逾 18,000 家的强大国际性集团。

与此类似，在 20 世纪 60 年代，美国非常知名的漱口水品牌 Scope 摆脱 Listerine 带“药味”的配方，而以味道更佳、口感更舒适的形象进入漱口水市场 — 这对婴儿潮一代极具吸引力，不同于他们较为沉默的父母一代，婴儿潮一代更加关注产品使用的体验感受，而不仅仅是产品的功效而已。到 20 世纪 80 年代中期，Scope 已成功夺取 Listerine 原来拥有的将近一半的市场份额。

那么需要如何与 Z 世代进行互动呢？表面上看，您可能认为适用于千禧世代的方法对 Z 世代也同样有效，因为这两个世代都是成长在家用电脑已经司空见惯的时代。但近期调查显示，如今的儿童和青少年使用技

术的方式与二三十岁群体并不相同。千禧世代成长于台式电脑、便携式电脑相继兴起的时代，而 Z 世代则是成长在支持全天候连网的智能手机、平板电脑和其它便携式设备流行的时代。Z 世代在这些设备上同时进行多项活动的比率更高，他们使用的屏幕数量通常有五个或更多，相比之下，千禧世代只有两个。

“我光顾最多的是那些店员亲切和蔼、让人感到舒适的店铺。他们待人亲切，并不是只将你当作购买其商品的客户。” - CAITLIN P. (17 岁)



根据调查显示，新世代的习性对市场已经陆续产生影响 — 零售商与品牌商做深入研究以加深了解的时机业已成熟。但我们清楚，要想抓住 Z 世代同时关注多点信息的习惯，广告词需要言简意赅，更多依赖视觉元素而非文字。并且在内容上应侧重于展开有机会互动的双向交流，而非讲述零售商或品牌的故事。这样才能真正切中要害。Z 世代希望您了解他们的需求 — 而如果您这样做了，他们也会尝试了解您。

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GENERATION Z

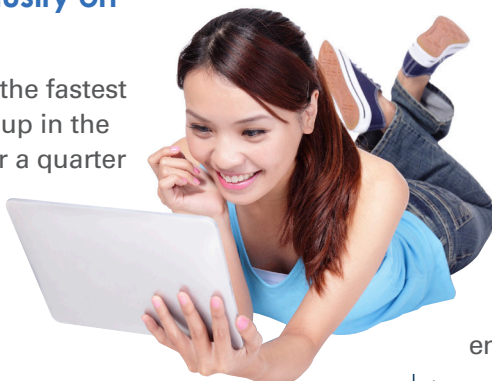
Is retail ready for the **WORLD'S FASTEST GROWING** consumer group?



By Retail News Insider

Most of us know a few teens and tweens who always seem to have their earphones in, one hand on their smartphone texting and the other on a tablet checking out their friends' latest Instagram photos. That's Generation Z. Born between 1995 and today, this group of constantly-connected, multitasking, technologically-savvy do-gooders are getting ready to turn the retail industry on its head.

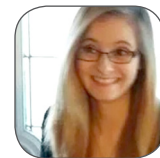
This next generation is the fastest growing consumer group in the world—making up over a quarter of the US population. And they are quickly making it clear that they're not following blindly in the shopping



footsteps of the generations that have come before them. Get ready to meet Generation Z—the future shoppers retailers and brands need to start preparing for today.

The question isn't whether Generation Z will have an impact on the retail market—but when. Despite the fact that many of them aren't even in high school yet, Generation Z is already a driving force in the economy. According to a report by advertising firm JWT, over 70 percent of parents say their Generation Z children influence buying decisions about apparel and family meals. More than half say their children are also influential when it comes to electronics and entertainment

purchases. Beyond their parents' pocketbooks, thanks to allowances, part-time jobs and their propensity for saving vs. spending, Generation Z already holds the keys to \$44 billion in spending power.



"I would [engage with a brand or retailer that asks for feedback] because they're reaching out to provide better service to their customers."
—THERESA U. (AGE 16)

What's more, in just a few short years, nearly 4 in 10 consumers will be from Generation Z—and their purchasing power is set to rise exponentially over the next 5 to 7 years as they grow to be the single largest group of consumers worldwide. According to consulting firm Strategy&, by 2020, Generation Z will make up 40 percent of the population in the world's biggest markets, including the U.S., Europe, China, India, Brazil and Russia.

Though it may be a few years off, the retailers and brands who start

GENERATION Z

[age 19 & under]

3 out of 4 are concerned about human's impact on the planet

57% would rather save than spend

8 seconds: The average attention span

76% use Instagram, but only 45% use Facebook

BIGGEST WORRIES: The economy and future job prospects

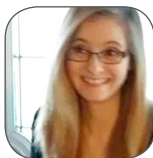


working to understand the needs and preferences of Generation Z now will be primed for potentially huge successes—and sales. We've seen this with nearly every generation that has come before. Take Millennials and Apple. Apple made a name for itself with bold, iconic commercials in the 1990s and 2000s. These advertisements focused on users' experience more than the product itself, garnering the attention and loyal following of Millennials, whose members are drawn to simple, authentic messages. According to a survey by CNBC, by 2012, 63 percent of Millennials—that's nearly 2 out of every 3—owned at least 1 Apple product.



"[When choosing between stores.] I'd pick one mostly based on what people have said about how they treat their customers."
—CAITLIN P. (AGE 17)

Electronics retailer Best Buy also bet big on the potential ROI of engaging with digital natives when they developed "Twelpforce" in 2009. Twelpforce was a groundbreaking service that offered real-time, free tech support through Twitter. The service was hugely popular with Millennials, the first generation to fully adopt social media—and set the standard for what a social media-based customer service program should look like. It's also estimated to have increased Best Buy sales by \$5 million and reduced customer complaints by 20 percent. (The service has since been transitioned to a new platform, reflecting the changing social media environment.)



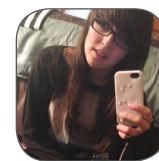
"My favorite brands are Forever 21 and Divine by H&M because they always have a sale of some sort."
—THERESA U. (AGE 16)

Brand success in adopting marketing strategies aimed at the newest up-and-coming generation isn't limited to technology retailers and CPGs. For example, Starbucks grew from a small Seattle coffee roaster with 4 locations in 1986 to a huge international powerhouse with over 18,000 stores by taking a new approach to coffee-house service that

appealed directly to Generation X's desire for individuality, higher quality items and social atmospheres.

Similarly, Scope broke into the mouthwash market in the 1960s by presenting itself as the sweeter, better feeling alternative to Listerine's "medicine breath" formulations—appealing to Baby Boomers who, unlike their Silent Generation parents, were more interested in what felt good than what was good for you. By the mid 1980s, Scope had managed to capture nearly half of Listerine's previous market share.

So what will it take to engage with Generation Z? On the surface, you might think the same techniques used for technology-driven Millennials would work, given that both generations grew up in an age where having a home computer was typical. But recent surveys have shown that today's children and teens don't use technology in the same ways. Where Millennials grew up on desktop computers, followed by laptops, Generation Z is growing up on smartphones, tablets and other portable devices that enable 24/7 connectivity. They also multitask more on these devices, typically using five or more screens, compared to Millennial's two.



"The store I shop most, I connect with the employees and I feel at home there. They talk to you like you're a real person and not just someone who's putting money into their pockets."
—CAITLIN P. (AGE 17)

Research is just starting to reveal the implications of these differences—and the opportunity is ripe for retailers and brands to delve in for a deeper understanding. But to start, we know that to grab Generation Z's often divided attention, messages need to be quick and simple, relying more on visuals rather than text. And they should be less about telling the retailer's or brand's story and more about starting a conversation. That really gets to the heart of the matter. Generation Z wants you to get to know them—and when you make that effort, then they'll get to know you.

Sources: Sparks & Honey, The Intelligence Group, Piper Jaffray, JWT