

BORN DIGITAL

DISCOVERING GENERATION Z,
THE CONSUMERS OF THE FUTURE

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CACI

BETTER DECISIONS
POWERED BY INSIGHT

1. WHO ARE GEN Z?

WHO ARE GEN Z?

Est. 1997



FOUR GENERATIONS

BABY BOOMERS

'46 – '64



GENERATION X

'65 - '80



MILLENNIALS

'81 - '97

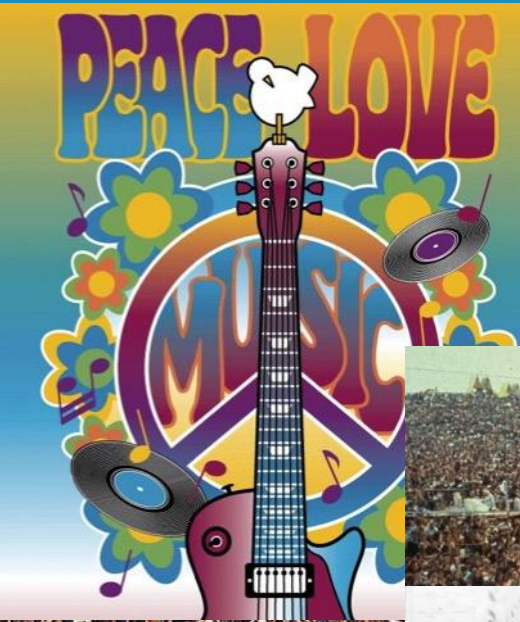


GEN Z

'97 – '13?



BABY BOOMERS: 46' –'64: CAME OF AGE IN LATE 60'S/70'S



BABY BOOMERS: AGED 53-72 TODAY

17.4 million

Least
likely to use
C&C, Catering
and Leisure



$\frac{3}{4}$ like to plan
their weekly
shop vs. 3% of
Gen Z



2x more
likely to pay
extra for quality



80% have
shopped online
in last year but
only 14% do so
weekly

GENERATION X: '65-'80: CAME OF AGE IN THE LATE 80'S & 90'S



GENERATION X: '65-'80: AGED BETWEEN 37 & 52 TODAY

11.1 million



MVS

(Most Valuable Shopper)



Least
frequent
shoppers



Most
likely click &
collectors



Biggest
retail and
catering
spenders

MILLENNIALS: '81-'97: AGED BETWEEN 21 & 36 TODAY



MILLENIALS: '81-'97 AGED BETWEEN 21 & 36 TODAY



Gen Z's Digital Equals



Internet on
mobile, at
least weekly



Online
Gaming, at
least weekly



Instant
messaging, at
least weekly



TV & films
online, at
least weekly



Facebook,
at least
weekly



Social
media, 1+
times a day



Connected
to internet
at all times

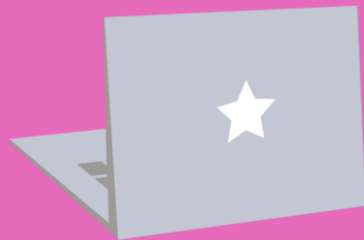
GEN Z '97 TO '13?



GEN Z ARE DIGITAL NATIVES



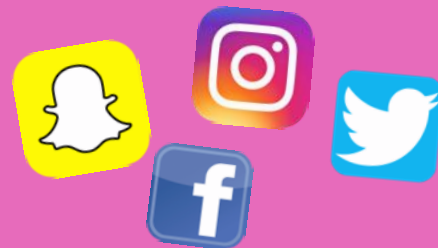
Uses internet on
mobile, at least weekly



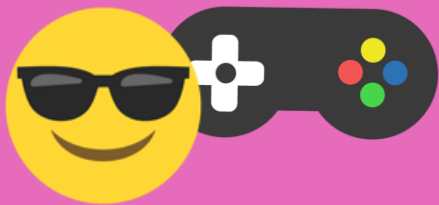
*When I need information,
the first place I look is the
internet*



*I like to be connected
to the internet at all
times, wherever I am*



Social
(and has 100+ followers)



Instant messaging
& Online gaming at
least weekly



Downloads music, TV
or films online, at
least weekly



Updates social network
status at least weekly



Social networking 1+
times per day

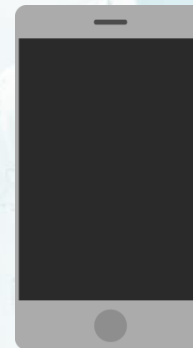
GEN Z ARE NOT ALL THE SAME



AFFLUENT GEN Z ARE MOST DIGITALLY ENGAGED



AFFLUENT GEN Z ARE THE MOST CHANNEL FLUID CONSUMERS



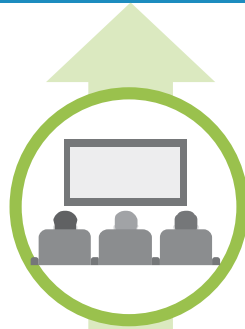
GEN Z WILL BE TOMORROWS SPENDERS



FREQUENCY
+14%



CATERING USE
+12%



LEISURE USE
+22%



RETAIL SPEND
-20%



RETAIL USE
-9%



SHOPPER MISSION
KILLING TIME

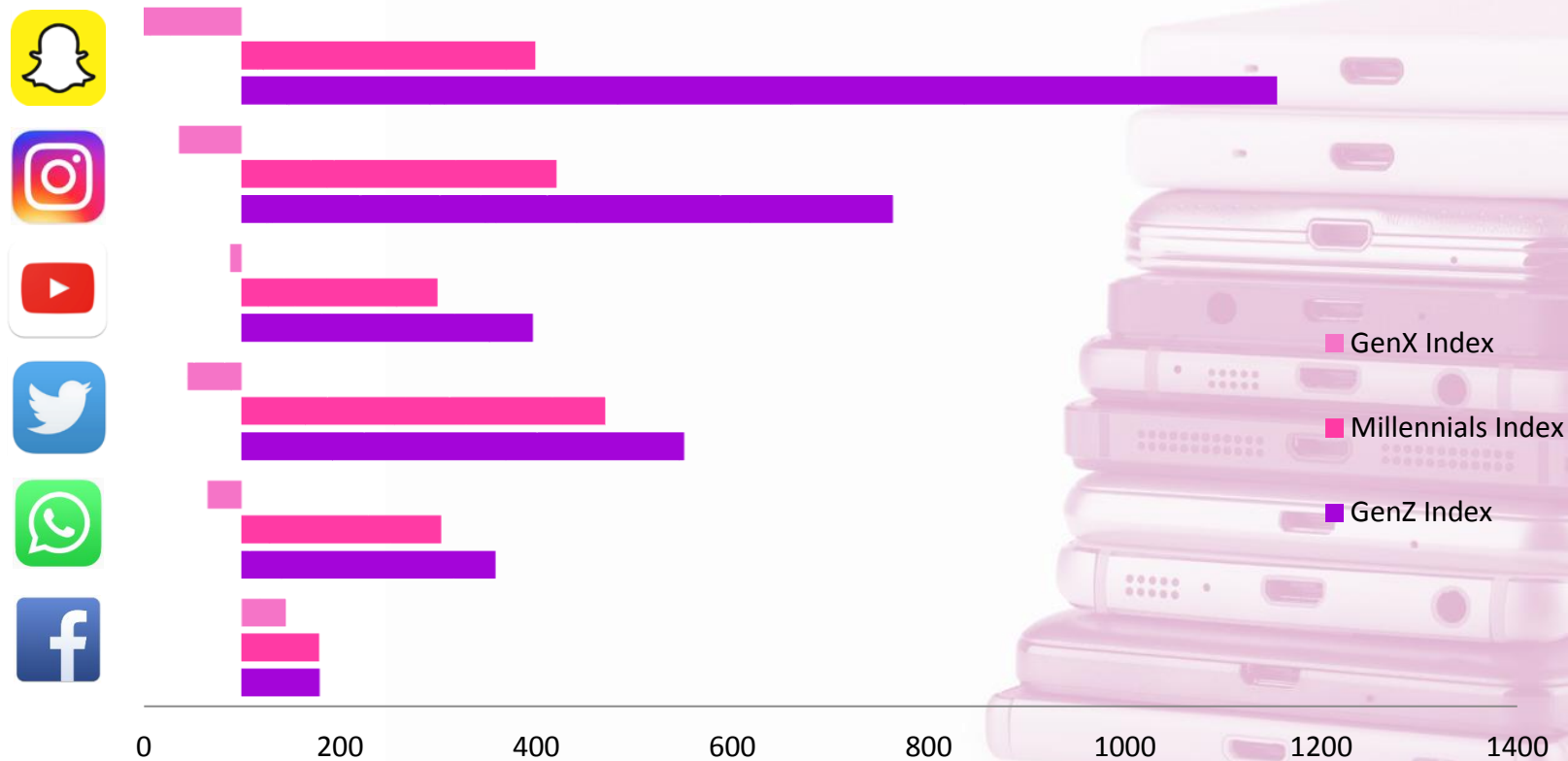
2035



21%

28%
Millennial

18%
Gen X



2. THE PATH TO PURCHASE

RETAIL REVOLUTION



RETAIL EVOLUTION



THE PATH TO PURCHASE



#inspiration



Proposition



Offline Marketing



Social & Digital



Tailored
Recommendations



YouTube



Inspiration
Centres

#research



Showroom



Instore Online



Webrooming



YouTube



Reviews



Price Comparison

#justify



Group Experience



Selfies



Dressing Room



Store Staff



Social Media



Tailored
Recommendations

#purchase



Saving &
Cautious Spending



Compare Offer



Payment Source



Transaction



Immediacy



Click &
Deliver-Quick

#loyalty



Loyalty Cards



Friends &
Followers



Creating Videos



Social Login



Forums



Product Reviews

#inspiration



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Product Reviews

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