

SENIORS IN CHINA, THE “HIDDEN TREASURE” 中国老龄化社会的潜藏价值

REPORT SERIES 系列报告



CHAPTER 3 第三篇章

UNLOCKING THE SILVER ECONOMY
银发经济的基本盘和新常态





DISCOVERING THE “HIDDEN TREASURE” IN THE SENIOR MARKET 我们发掘中国老龄化社会的潜藏价值

The Seniors in China: The “Hidden Treasure” Report Series is produced by Wavemaker, containing 4 chapters and 1 epilogue. The chapters will be released over 8 months one by one, giving a holistic view of what urban seniors in China are like, why they are important and valuable, and how brands can unlock potential and co-create solutions together. This is Chapter 3 of the report series.

蔚迈发布的《中国老龄化社会的潜藏价值》系列报告，共分为四个篇章和一篇番外，将历时8个月逐一发布，以全面详尽地分享我们对于中国城市老龄化群体的解析和主张，以及与多个行业的企业共创的观点与解决方案。此为系列报告的第三篇章。



CHAPTER 1 第一篇章	REVISITING SENIORS IN CHINA 重新“遇见”中国的老龄化群体	Oct. 2019
CHAPTER 2 第二篇章	THE HIDDEN VALUE AND POWER 潜藏的商业价值和影响力	Jan. 2020
CHAPTER 3 第三篇章	UNLOCKING THE SILVER ECONOMY 银发经济的基本盘和新常态	Mar. 2020
CHAPTER 4 第四篇章	SHARING PERSPECTIVES FROM EXPERTS ACROSS INDUSTRIES 各界共谈银发经济，探索解决方案	May. 2020
EPILOGUE 番外	PASSING ON THE WISDOM OF A GENERATION 他们走过风雨，他们依然年轻	Jul. 2020

IN CHAPTER 1, RELEASED IN OCT. 2019 第一篇章于2019年10月发布



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CN 中文 EN 英文



TRUE DEPICTION OF SENIORS IN CHINA 中国老龄化群体的真实风采

- We called for more attention to be paid to the ageing society and redefined “old age”
- We firstly divided seniors in China into three different generations
- We revealed their true potential and objections to being characterized as the “old”
- 我们呼吁重视老龄化社会，重新定义“老”
- 首次定义和划分了三个代际
- 揭示了他们的真实风采，和他们不愿做传统定义“老人”的“倔强”

IN CHAPTER 2, RELEASED IN JAN. 2020 第二篇章于2020年1月发布



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BOOMING SILVER ECONOMY & CORE NEEDS BEHIND IT 蓬勃的银发经济及其背后的核心需求

- We pointed out the high relevance of the senior market to all different industries
- We estimated the annual spending power of senior citizens in China and summarized three major business challenges
- We elaborated on the four core needs that nourish the silver economy in China
- 我们指出老龄化市场的发展与各行各业都息息相关
- 预估了中国一到三线城市老龄化群体的消费力，并梳理出商业领域存在的三大挑战
- 解析了催生老龄化经济的四大核心需求

WHAT'S NEW IN CHAPTER 3: THE ESSENCE BEHIND NEEDS & BEHAVIOURS -

在第三篇章中，我们将聚焦需求和行为背后的本质 -

SENIORS' VALUES 价值观

CORE VALUES 掌握基本盘

What are the unchangeable and unwavering characters of seniors?
Having a clear understanding of these core values is the surest way to win with this market.

老龄化群体身上哪些“改不了、夺不走、丢不掉的东西”是什么？
掌握基本盘，是赢得老龄市场的决定性因素。

EVOLVED VALUES 把脉新常态

Meanwhile, what are the trends that make them different from before?
Detecting and monitoring their 'new normal' is a key to seize opportunities and achieve sustainable growth.

用发展的眼光来看，他们呈现出哪些“不同以往”的趋势性、不可逆的发展状态？
把脉新常态，才能抓住机遇、灵活应变，获得长远发展。

GENERATIONAL VARIATIONS 识别代际差

Spanning 30 years, what are the similarities and differences within the three senior age groups?
This knowledge is crucial to build customized strategies and precision marketing.

年龄跨度超三十岁，三代人有哪些相似，又有哪些差异？
识别代际差，方能有效进行市场的精耕细作。

INFORMED BY THEORY

我们用科学严谨的方式探究价值观

We refer to sociological theory:

- 1) Social environment plays a big role in shaping values
- 2) Values dynamically evolve with the change of social environments
 - Formative years: coming of age at or around 15 year's old, has a lasting effect on values
 - Meanwhile, social changes trigger adaptive adjustments

To obtain a holistic picture of seniors' values, we review the social environments of seniors' past and present. We also scan the three senior groups for similarities and differences.

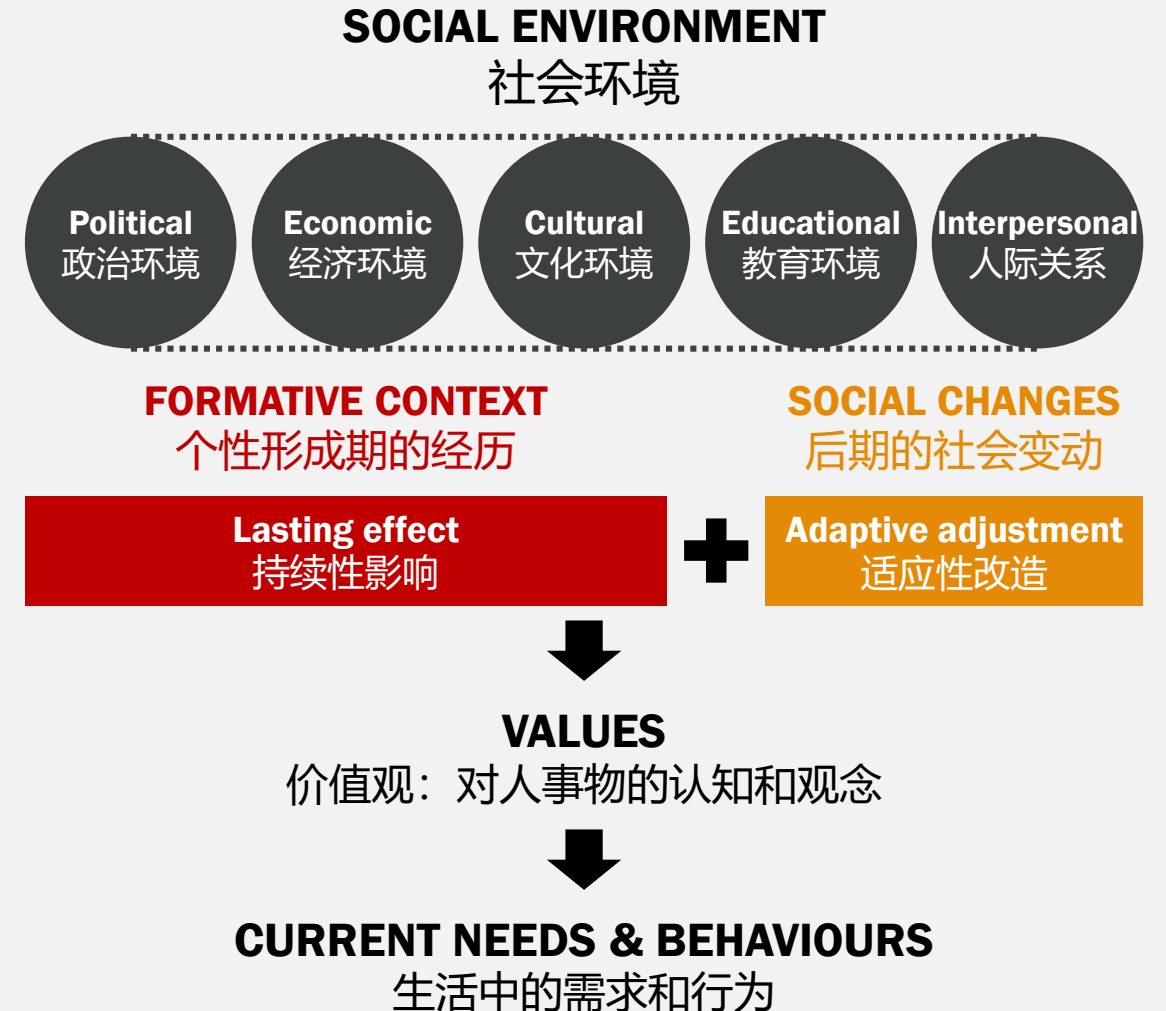
我们借鉴了社会的相关理论：

- 1) 社会环境对价值观的形成影响巨大
- 2) 价值观具有可塑性，随社会环境的变化而变化
 - 15岁个性形成期的经历对价值观具有持续性的影响
 - 同时，后期的社会变动会带来适应性的调整

我们审视过去、关注现在，细究三代人的经历，以此全面洞悉老龄化群体的价值观。

THE DYNAMIC EVOLUTION OF VALUES

价值观是动态演进的



**VALUE CONSTRUCTION IS A LIFELONG PROCESS.
FOR SENIORS, THEIR JOURNEY IS COMPLEX AND MULTIFACETED.
THIS JOURNEY BEGAN OVER 70 YEARS AGO AND CONTINUES TO EVOLVE.**

**因而，我们需要从生命历程的视角，来研究老龄化群体的价值观塑造之旅：
这段旅程漫长又壮阔，始于七十年前，并且延续至今。**

IT'S BEEN A TURBULENT JOURNEY WITH CONSTANT CHANGE

通盘回顾七十载，这段历程跌宕起伏，变化无常

1949 - 1965 Hardship & poverty 艰苦贫困	1966 - 1978 Twists & turns 波折动荡	1979 - 1990 Openness & prosperity 开放繁荣	1991 - 2010 Rapid growth 加速腾飞	2010 till now Steady development 稳健发展
<p>1949 Founding of PRC 新中国成立</p> <p>1950-1953 Korean War 抗美援朝</p> <p>1958-1960 Great Leap Forward 大跃进</p> <p>1959-1961 Three Years of Difficulty 三年困难时期</p>	<p>1966-1976 Cultural Revolution 文化大革命</p> <p>1976 The Passing of Chairman Mao 毛主席去世</p> <p>1977 College Entrance Examination Restored 恢复高考</p> <p>1978 Economic Reform & Opening Up 改革开放</p>	<p>1979 Diplomatic Relations with the USA Restored 中美关系正常化</p> <p>1980 Beginning of One Child Policy 一胎化政策推行</p> <p>1981 Individual Businesses Encouraged 鼓励个体经营</p> <p>1987 Reform of State-owned Enterprises Caused Layoffs 国企改革重组引发下岗潮</p> <p>1990 Official Establishment of Stock Exchanges 股市正式交易</p>	<p>1992-1993 Housing Bubble 房地产泡沫</p> <p>1994 Official Access to the Internet 正式接入互联网</p> <p>1999 E-commerce Emerged 电商出现</p> <p>2001 Entry into WTO 加入世贸组织</p> <p>2008 Beijing Summer Olympics 北京奥运会</p> <p>2010 Shanghai Expo 上海世博会</p>	<p>2011 China Became World's 2nd Largest Economy 中国成为世界第二大经济体</p> <p>2015 Second Child Policy Released 二胎放开</p> <p>2018 40th Anniversary of Economic Reform & Opening Up 改革开放40周年</p> <p>2019 The Coming of 5G 5G时代来临</p> <p>2020 The COVID-19 Pandemic 新冠肺炎全球大流行</p>

WITH CONSIDERABLE CHANGE IN THEIR SOCIAL ENVIRONMENT, COMES A DYNAMIC EVOLUTION OF THEIR VALUES

他们的价值观也在过去和现在截然不同的社会环境中，不断被塑造和动态变化

SENIORS' FORMATIVE YEARS

他们成长的时代

SOCIAL CHANGES AFTERWARDS

后期的社会变动（我们成长的时代）

Political
政治环境

Continual internal changes
内部不断变革

A rising power worldwide
站上世界舞台

Economic
经济环境

Scarcity
从无到有

Rapid growth
从有到优

Cultural
文化环境

Uniformity
一致性

Individuality & diversity
个性化和差异化

Educational
教育环境

Limited chances and choices
可遇不可求

Equal opportunity with rich choices
机会均等，选择多样

Interpersonal
人际关系

Trust with heart
同志情谊

Trust with head
利益考量

BEFORE 过去

VS.

TODAY 当下

THEIR VALUE SET DRAWS FROM BOTH THE PAST AND THE PRESENT

过去的经历打造了他们的“基本盘”，而其又在新时代碰撞出“新常态”

Consumerism
消费主义

Individuality
彰显自我

Self-interest
利己考量

Pleasure-seeking
享乐文化

TODAY 当下

New values evolve alongside social changes 社会变动带来的新价值

EVOLVED VALUES
新常态

BEFORE 过去

Deep-rooted core values established in their formative years 源自个性形成期的价值观基本盘

Patriotism
爱国情怀

Conformity
规矩本分

Content
知足感恩

Diligence
吃苦拼搏

Optimism
乐观积极

Dedication
奉献利他

Tradition
尊重传统

Collectivism
集体为先

Integrity
公平公正

Frugality
勤俭节约

EVOLVED VALUES 新常态

CONSUMPTION CLASSIFICATION 消费要分级

Smart & selective purchase
能省则省，该花则花

BLEND IN, BUT WITH SPARKLE 逐波中闪耀

“A special star in the milky way”
做集体的一份子，但也要发光

REALIZATION OF SELF & OTHERS 成就你我他

Fulfill others, fulfill me too
成全他人，也成就自我

ENJOYMENT WITH COMMITMENT 拼搏式享乐

Play really “hard”
认真去玩乐，严肃对待兴趣与娱乐

WE HAVE IDENTIFIED THREE KEY GENERATIONS OF SENIORS

此外，基于中国社会文化环境的特殊性，我们重新划分了三代不同的老龄化群体

1

**WITNESS OF
REVOLUTION**
革命见证者

Birth years
出生年份

1934 - 1950

2

**TOUGHENED NEW-CHINA
1ST GENERATION**
百炼成金建国一代

1951 - 1963

3

**OPENING UP
NEWBORNS**
改革开放新生儿

1964 - 1977

Age now
目前年龄

70 - 86 y/o

Our study focuses on 本报告聚焦

70 - 77 y/o

43 - 56 y/o

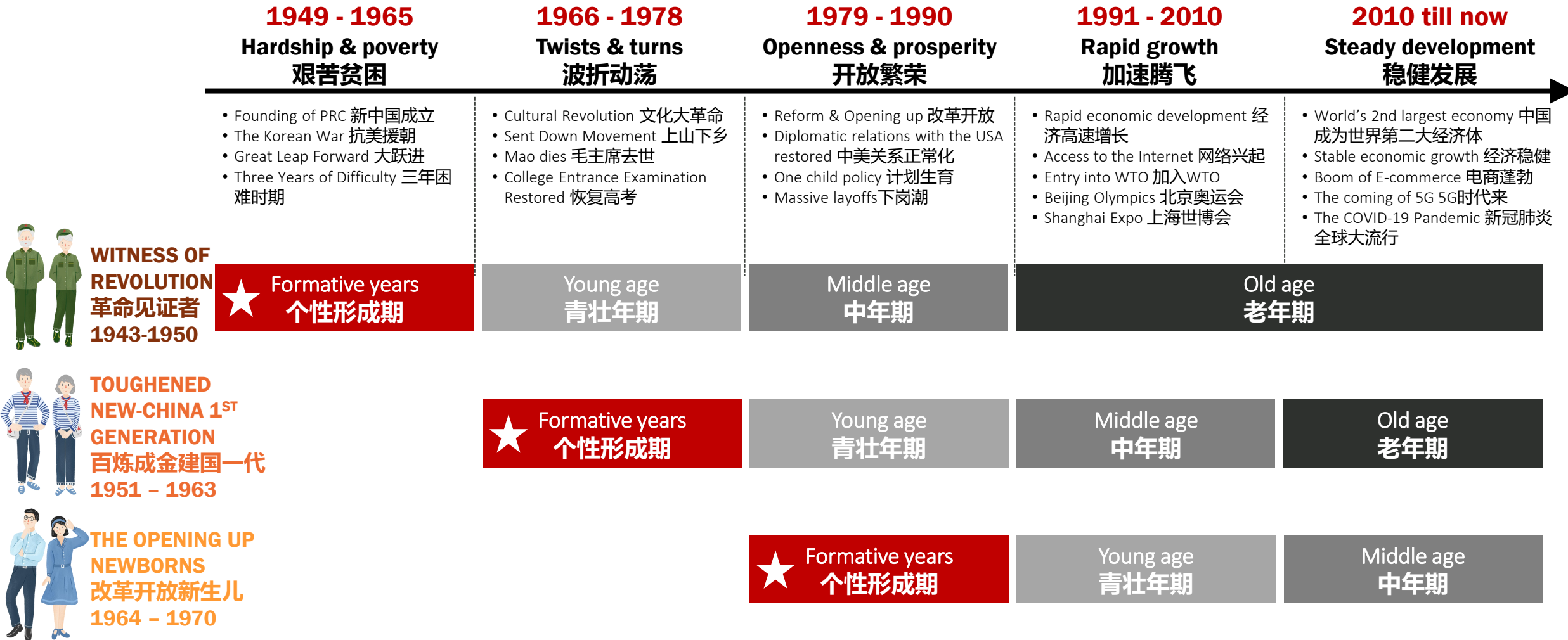
Our study focuses on 本报告聚焦

50 - 56 y/o



SOME OF THEIR VALUES VARY ACROSS THESE GENERATIONS

因人生经历的不同，三代人的“基本盘”和“新常态”有所不同，需要识别代际差



UNDERSTANDING THESE VALUES IS THE KEY TO UNLOCKING THIS ENORMOUS SENIOR MARKET

只有洞悉基本盘、新常态和代际差，才能有效推动各行各业万亿级消费力的兑现

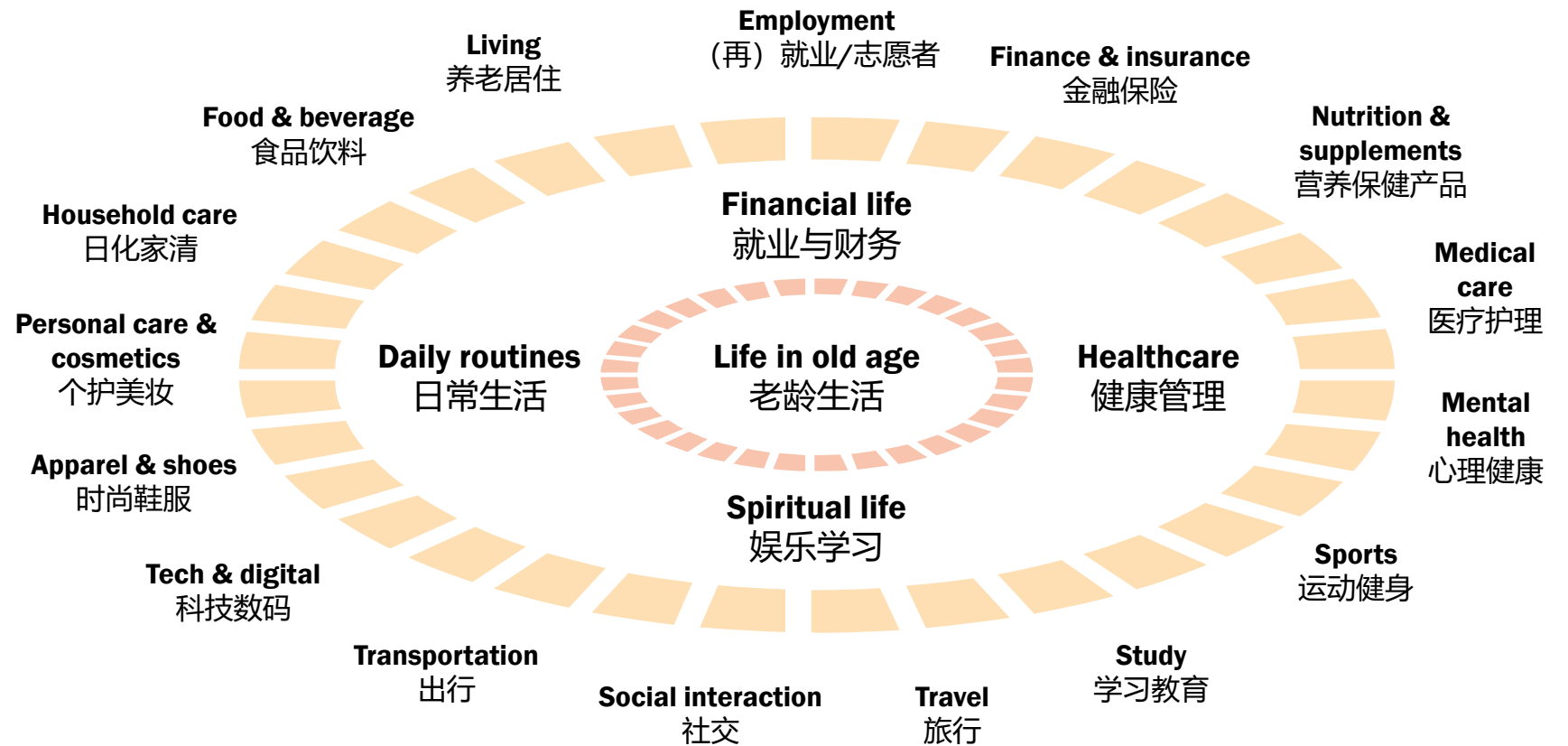
THE ESTIMATED ANNUAL SPENDING POWER OF SENIORS IN TIER 1 TO 3 CITIES IN CHINA

中国一到三线城市
老龄化群体年消费力预估为

6.64

TRILLION RMB
万亿人民币

Based on spending data and projected population numbers from our research
按照调研消费数据及推及人口计算得出



WE HAVE DEVELOPED A COMPREHENSIVE SOLUTION TO HELP BRANDS UNDERSTAND AND ACTIVATE THE SILVER ECONOMY

我们打造了全面的解决方案，望助力企业洞察和焕活银发经济

WAVEMAKER SOLUTIONS FOR AGEING MARKET 蔚迈老龄化市场解决方案

STRATEGY 策略

- Business compass
- Needs map & consumer segmentation of seniors
- Product positioning and portfolio management
- Market entry strategy for new brands

- 老龄化市场潜力罗盘
- 中老年群体需求图谱及细分模型
- 产品定位及组合策略
- 新品牌进入市场策略

DATA 数据

- Wavemaker senior generation tracking database
- Wavemaker customized senior consumers data pool

- 蔚迈老龄化人群连续研究数据库
- 蔚迈中老年人群定制数据池

COMMUNICATION 传播

- Media strategy, media investment and precision marketing for senior target audience
- Content marketing
- Ecommerce marketing

- 老龄化受众的媒介策略和精准营销
- 内容营销
- 电商营销

WE INVITE YOU TO JOIN US IN CAPTURING THIS POTENTIAL

现在，我们诚邀各行各业的有识之士，共同探索和解锁银发经济的增长之道



Contact to join or for more information:

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We are releasing Chapter 4 in this May, Sharing Perspectives from Experts Across Industries. Here we'd like to invite brands and individuals from all fields that are concerned with this topic, to discuss on:

- **How to develop the silver economy and how can brands capture growth**
- **How to understand seniors' needs and tap their potential**
- **How to enhance your brands appeal across different senior generations**
- **How to fulfill responsibilities and co-create a better society**

我们将于今年5月发布系列报告的第四篇章《各界共谈银发经济，共创解决方案》，在此我们招募各领域的企业和前瞻思考者，共同探讨：

- 展望开启银发商机与合作共赢
- 探索市场需求挖掘与潜力激发
- 如何吸引不同代际的消费群体
- 如何履行责任，创造美好社会

**THEIR CORE VALUES:
ROOTED DEEPLY IN THE PAST**

掌握基本盘：
源于过去，根植于心的
底层价值观

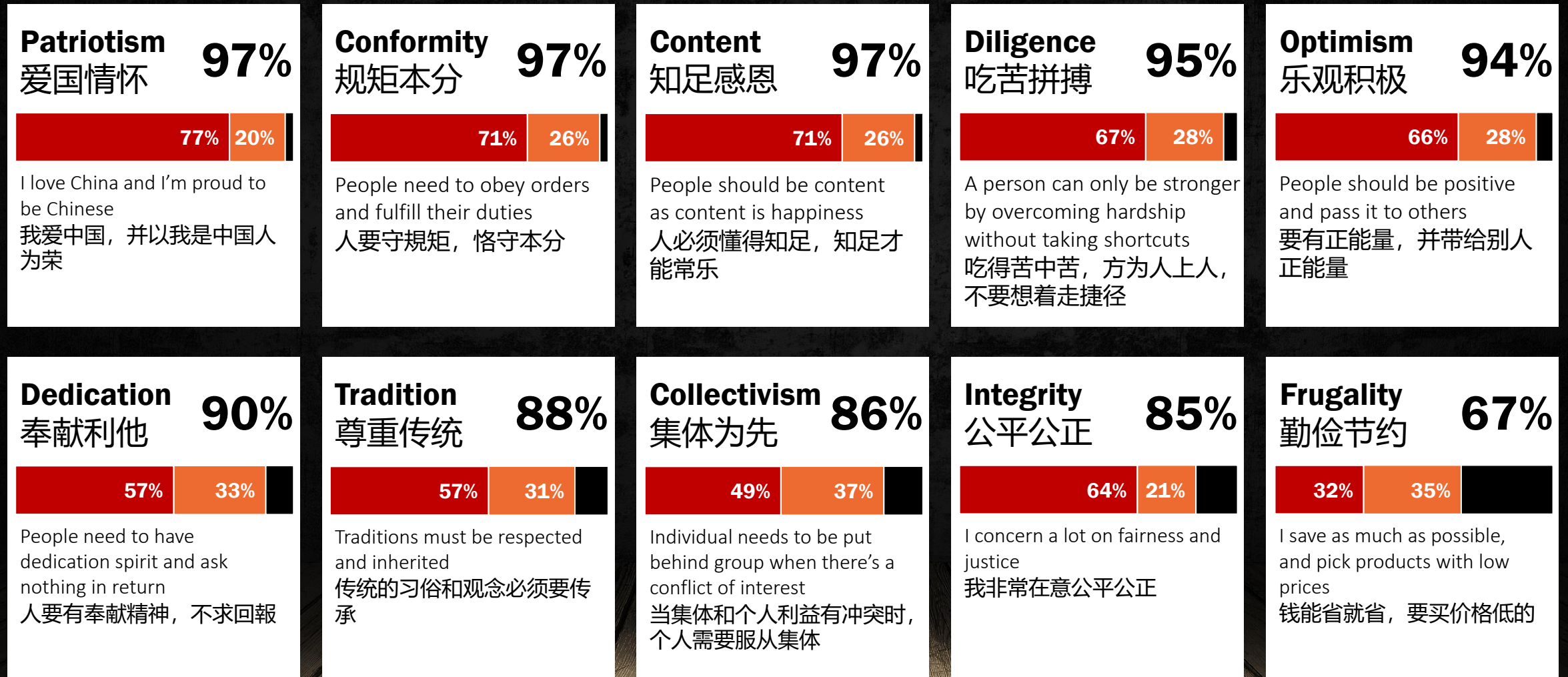




THEIR BASE VALUES ARE BUILT IN A TIME OF CHANGE AND RELATIVE HARDSHIP
他们的基本盘塑造于艰辛又纯真的年代

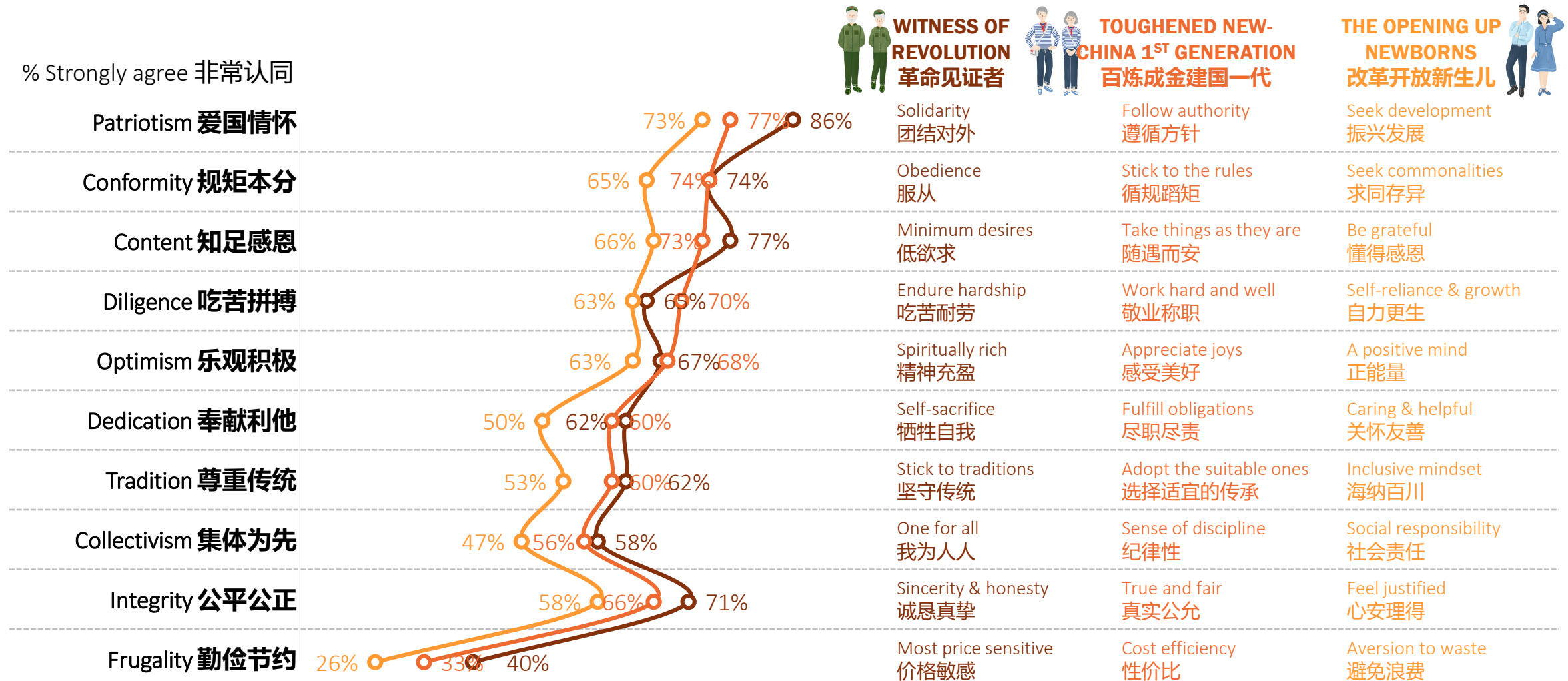
EXPLORING THESE CORE VALUES

他们身上深根了很多可贵的时代精神，形成了价值观的“基本盘”



THE YOUNGEST SENIOR GENERATION ARE MOST INFLUENCED BY MODERN VALUES

但是，三代人在认同感和具体表达上存在差异。越年轻，受当代价值观影响越大。



FIVE DIFFERENT DIMENSIONS, THROUGH WHICH WE CAN UNDERSTAND THEIR CORE VALUES

让我们分别去回顾他们的成长之路，从五个方面，去细究每代人基本盘的塑造

FORMATIVE YEARS

个性形成期



What are the historical events that happened during their formative years?
他们的个性形成期有过哪些大事件?

BACK THEN

那时生活



What were their living conditions like back then, such as material life, education, etc.?
他们那时的生活环境是怎样的，如物质条件、文化教育水平等?

POPULAR CULTURE

文化宣传



What were the ideas, thoughts, icons, and cultures which were popular or promoted at that time?
当时流行或宣传的思想、榜样或文化是什么?

LIFE PATH

人生大事



What are the big events that happened throughout their life journey?
他们一路走来的生活，经历了哪些大事?

THEIR TAGS

属于这代人的关键词



What are the symbols and codes of their generation?
他们这代人有什么象征?

WITNESS OF REVOLUTION 革命见证者 (70-77 Y/O)

Hard-working & enduring hardships 吃苦耐劳
Altruism & selfless devotion 为人民无私奉献
Collectivism 无我的集体主义

“

I'm the first happy generation in the new China. Though born in the old society, I grew up in the new one, spared from wars. Reviewing my whole life, it's difficult and tiring, but lucky too. It's a life about being hard-working, being selfless, and being devoted. In consideration of interests, nation always comes first, groups as the second, then the others, and lastly my own family. In terms of material life, I'm very easy and basic, just having clothes to wear, a place to live, and a car to drive.

Uncle Gu, 74 y/o, Nanchang

我是新中国第一批的幸福人，免于战争，生在旧社会，长在新社会。我的一生是艰苦奋斗的一生，身心俱疲的一生，也是幸运的一生，大公无私的一生。第一想到是国家，第二是集体，第三是别人，最后才是自己的家庭。我对生活是很平淡的考虑，衣服能穿就行，房子能住就行，车子能走就行。

顾叔叔，74岁，南昌

”





THEY GREW UP IN A TIME OF REVOLUTION AND FACED MANY HARDSHIPS

他们成长于艰苦磨砺的革命年代



1949

Founding of PRC
新中国成立



- The Communists overturned the “three great mountains” and established the PRC
- Land was collectivized, and industrial productivity centralized
- Average life expectancy was 41
- 中国共产党领导全国各族人民，推翻三座大山，建立新中国
- 土地集体所有制，工业产能集中化
- 平均预期寿命41岁

1950

Korean War
抗美援朝



- The biggest war after the founding of PRC: Chinese People’s Volunteer Army aided North Korea in its war against United Nations forces on the Korean peninsula
- 新中国成立后最大的战争：中国人民志愿军赴朝作战，支援朝鲜人民抗击美国侵略

1958

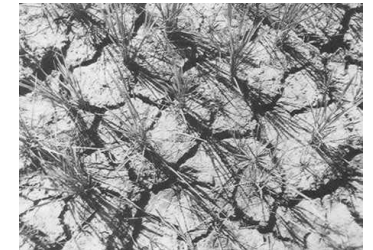
Great Leap Forward
大跃进



- Authorities intended to overtake the Western in short years and set radical production quotas
- The unrealistic targets led to disordered economic development
- 在生产发展上追求高速度，以实现工农业生产高指标为目标，志在“赶超英美”
- 国民经济比例发展失调，带来了严重的经济困难

1959

Three Years of Difficulty
三年困难时期



- The drought and the destruction of agricultural development caused extreme poverty and food shortages
- 牺牲农业发展工业的政策，加之严重旱灾，导致全国性的粮食和副食品短缺危机



THEY EXPERIENCED SEVERE SCARCITY

体会计划经济，物资贫乏的生活

- Essentially no market under the planned economy
 - Government issued coupons for basic goods
 - Scarcity in resources so people had to be frugal
 - Flashlight as the only home-appliance in most families
 - Wooden or self-made toys for fun
- 计划经济体制
 - 通过粮票、布票等票证换取生活基本用品
 - 物资匮乏，为温饱奔忙，必须节俭
 - 手电筒是当时大部分家庭唯一拥有的“家用电器”
 - “苦中作乐”——木质玩具、自制玩具



Pictures from the Internet 图片来自网络



THEIR MORALS WERE SHAPED BY REVOLUTIONARY ICONS

当时，文化宣传的主流是革命榜样和道德模范

- Propagandist entertainment, e.g. myths of Communist heroes, peasants' prosperous lives in the new China, etc.
- 革命影视作品，如革命英雄故事、贫农当家作主



1950
The White-haired Girl
白毛女



1953
Circumvent
Hua Mountain
智取华山



1954
The Letter
With Feathers
鸡毛信



1955
Dong Cunrui
董存瑞



1955
Flowers of Our
Motherland
祖国的花朵

- Praise of model workers, soldiers, and leaders, on their contributions and self-sacrifices for the country and people
- 颂扬劳动模范和革命战士，为祖国和人民奉献牺牲



Lei Feng
Serve the people
wholeheartedly
雷锋
全心全意为人民服务



Cleaner Shi Chuanxiang
Me getting dirty for the
cleanliness of thousands of
families
清洁工人时传祥
宁肯一人脏，换来万家净



Oilman Wang Jinxi
The "Iron man" spirit to
use his body to cover oil
blowout
石油工人王进喜
用身体制服井喷 "铁人"



Chinese People's
Volunteer Army
The most lovable
people
中国人民志愿军
最可爱的人



WITH A RELATIVELY UNIFORM PATH THROUGH LIFE, THIS GENERATION TEND TO BE VERY ALIKE IN VALUES AND BELIEFS 这代人拥有相似的人生轨迹，塑造了他们较为趋同的价值观

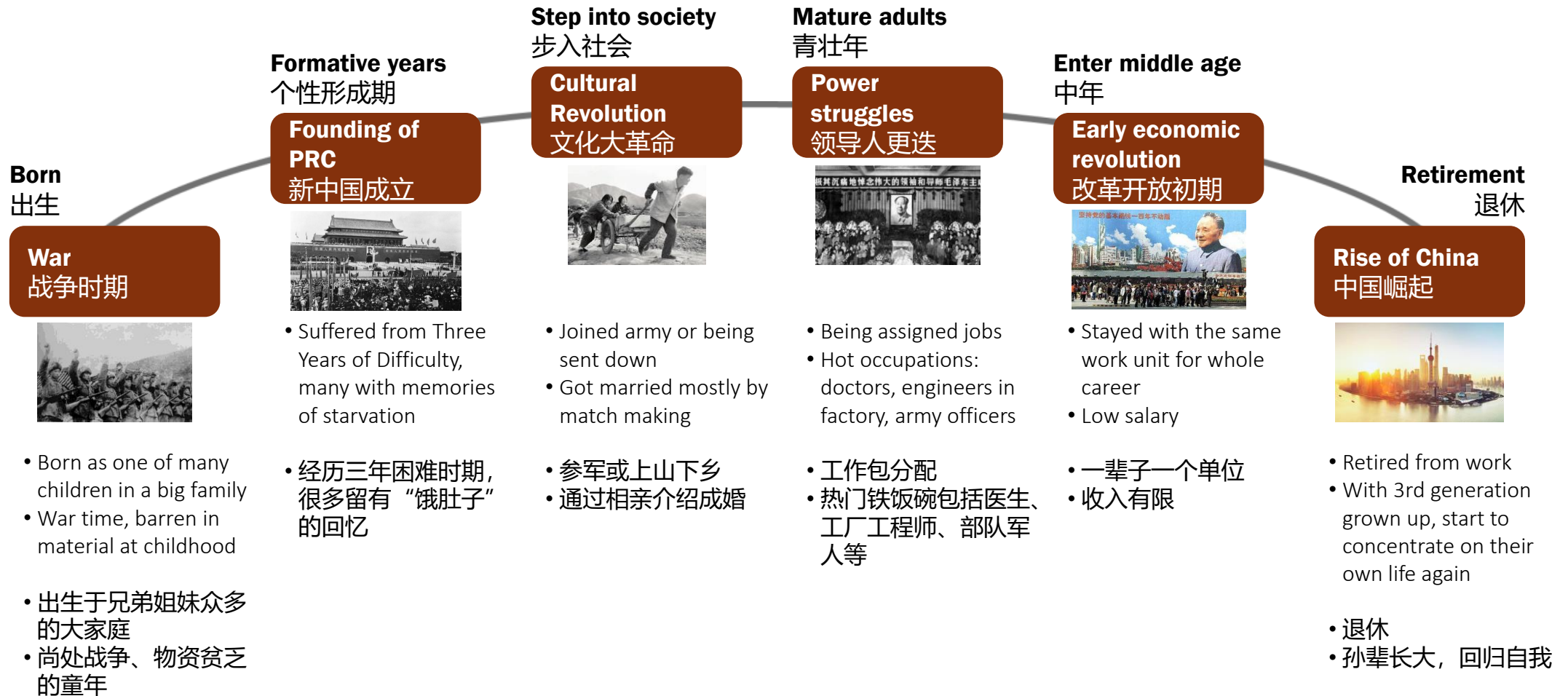
FORMATIVE
CONTEXT
个性形成期

BACK THEN
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POPULAR
CULTURE
文化宣传

LIFE PATH
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THEIR TAGS
属于这代人的
关键词





HASHTAGS FOR THIS GENERATION

他们的代名词

The 1st sent-down generation

One job for a lifetime

Hard-working & enduring hardship

Be a good person and do good deeds

Selfless dedication to the common good

Simple and pure in thinking and living

老三届，第一批上山下乡

一辈子一个单位

吃苦耐劳

做好人做好事

无私奉献，为人民服务

思想淳朴，生活节俭

How these values play out in their current lives

这些价值观念如何影响当下的生活



Do good for others, e.g. voluntary works, engage in community committees, etc.
为他人服务，如志愿者工作、居委会工作



Harbor revolutionary comradeship, e.g. read articles from the party, use terms like "comrade", "leader", "organization"
感怀革命情谊，如看党报党刊，称呼“同志”，“领导”，“组织”



Highly sensitive to price and mostly only spend on basic goods
价格敏感，不乱花钱，主要买生活必需品



Reluctantly accept money as part of traditional rituals, save for children rather than spend it on themselves
不愿收子女钱，存钱为下一代着想

**TOUGHENED
NEW-CHINA 1ST
GENERATION
百炼成金建国一代
(57-59 Y/O)**



Pragmatism 务实
Self-renewal & struggle 自强奋斗
Adaptability 适于改变

“

Our generation have been through a lot. I experienced some sudden changes several times. The Sent Down movement turned me from a citizen to a peasant, the recruitment policy got me back to the city as a factory worker, then the massive layoffs pushed me to make a living on my own. It's fate, something you can hardly control, but you can still do what you are capable of, to strive for your own life.

Uncle Xu, 63 y/o, Qiqihar

我们这一代人经历过几个事，我自己就有过几个一夜之间的突变。下乡让我从城市的娃变成农村的娃，招工又让我恢复了城市的生活，变成了工人，后来又改制了，把你推向社会，你需要自给自足。这是命运，有的时候身不由己，只能做好分内事，但有的时候也要自己争取，把命运把握在自己的手里。

许叔叔，63岁，齐齐哈尔

”



THEIR FORMATIVE YEARS WERE A TIME OF CHANGE AND CHAOS

他们的个性塑造于波澜起伏、充满变化的年代

1966

Sent Down Movement
上山下乡



- Urban youth were removed from schools and “sent down” to rural area, to gain “re-education” by working alongside peasants, involving over 16 million young people
- 十年教育停滞，“知识青年要农村去，接受贫下中农的再教育”，知青总数超1600万人

1976

Cultural Revolution
文化大革命



- Mao launched an ideological campaign that caused social order to entirely break down
- Lots of educational institutions got disrupted
- 社会长期动乱
- 知识分子受到迫害，学校停课，文化园地荒芜，科研机构撤销

1977

College Entrance
Examination Restored
恢复高考



Passing of Chairman Mao
毛主席去世



- Three key state leaders passed (Mao Zedong, Zhou Enlai, Zhu De)
- China witnessed nationwide mourning, and a power struggle ensued
- 毛泽东、周恩来、朱德三位领导人逝世，举国哀悼毛主席
- 领导人更迭

- High school examinations were restored in the winter
- Millions of sent-down youths went back to seek education
- 高考恢复
- 成千上万人重新求学



THE ECONOMY WAS SLOW, BUT THEY HAD STRONG IDEOLOGICAL SUSTENANCE 经济发展迟缓，但有强大的意识形态寄托

- Slow economy largely due to the Cultural Revolution
- Living condition remained poor, goods were still scarce
- “Four big items” as signs of wealth
- Mao’s “Little red book” memorized by everyone, images from the book appeared everywhere

- 受文革影响，国民经济停滞徘徊
- 人民生活水平鲜有提高，物资仍然有限
- “四大件”成为一般家庭中高级的消费品
- 《毛主席语录》风靡全国，人人背诵





POLITICAL PROPAGANDA PREVAILED AND MAOIST PERSONALITY CULT SOARED

政治宣传持续普及，毛主席崇拜的氛围浓厚

- Popularity of “model operas”, dramatizing the fight against capitalist enemies and the economic re-construction
- 革命样板戏流行，描绘共产党领导下的阶级斗争和经济建设

- Personality cult of Chairman Mao in different ways, e.g. editorial, posters, portraits, and statues, etc.
- 崇拜信仰毛主席，随处可见的毛主席海报、画像、雕塑等



1971
Shajiaobang
沙家浜



1971
Legend of the Red
Lantern
红灯记



1974
Sparkling Red Star
闪闪的红星



1975
Chunmiao
春苗



Long live chairman Mao! Long,
long live!
毛主席万岁万岁!



Comrade Mao Zedong is the
greatest Marxist-Leninist of
the present age
毛主席是当代最伟大的马列
主义者



The sunlight of Mao Zedong
Thought illuminates Great
Proletarian Cultural Revolution!
毛主席思想的阳光照亮无产
阶级文化大革命的道路!



THEY HAD A SHARED HISTORICAL SOURCE, YET WITH ECONOMIC REFORM THEIR LIVES TOOK DIFFERENT PATHS

这一代人拥有相似的前半程，但随着改革开放，却走入了差异的后半程

FORMATIVE
CONTEXT
个性形成期

BACK THEN
那时生活

POPULAR
CULTURE
文化宣传

LIFE PATH
人生大事

THEIR TAGS
属于这代人的
关键词



Pictures from the Internet 图片来自网络



HASHTAGS FOR THIS GENERATION

他们的代名词

Lost youth, lost education

From assigned jobs to massive layoffs

Like to be 'in' with the group

Strive for myself with unyielding spirit

Pragmatic, with worldly wisdom

Adaptable to changes

Carpe Diem, make up for lost time

被文革耽误青春和教育的一代

从大锅饭到下岗潮

喜爱抱团

奋斗自强

务实，讲究人情世故

适于改变

活在当下，弥补遗憾

How these values play out in their current lives
这些价值观念如何影响当下的生活



Widely do square dance, showcasing their 'In with the group' mentality
广场舞受欢迎，让其可以融于群体



Like package tours in groups and group photos
喜爱抱团出游和拍团体照



Willing to spend on gifts to consolidate their social network
懂人情世故，善于通过礼尚往来以处理关系和办事



Open to changes and willing to listen to the young generation
开放玲珑，接受变化和新事物，乐于和年轻人相处沟通

OPENING UP NEWBORNS 改革开放新生儿 (50-56 Y/O)



Individualism & self-reliance 个人自主
Open-minded 开放多元
Pioneering spirit 开创精神

“

I have some vague ideas on those old poor days. However, I resonate more with the wonderful life stemming from the fast and tremendous development of our country. From planned economy to market economy, the trend of starting your own business, the information explosion, people became increasingly different. I realized that with your own efforts, you can create a splendid life that you want, and that's a great pleasure in both material and spirit aspects.

Uncle Ren, 52 y/o, Shanghai

小时候有一点点印象，有过物质非常匮乏的几年，但是随着时间的推移，我们国家发展得非常快，也是非常了不起，从计划经济到市场经济，开始下海潮，有很多的信息和冲击，人之间的差距也变得明显，我就想原来自己去闯去博可以如此精彩，通过努力可以获取自己想要得到的，无论是精神方面还是物质方面都是一种享受。

任叔叔，52岁，上海

”



THEY WERE BOUGHT UP AT THE SAME TIME AS CHINA'S OPENING UP 他们成长于中国改革开放与经济复兴的年代



1978

The Third Plenary Session of the 11th Central Committee
十一届三中全会



- The government started to implement policies for internal reform and external opening up
- Economic development became the key focus for the government

- 开始实行的对内改革、对外开放的政策
- 经济建设成为全党工作的重点

1979

Reform & Opening up
改革开放逐步落实



- Deng launched a set of economic reform policies, i.e. decollectivized agriculture, reformed urban industry, allowed small-scale enterprises, built up four special economics zones

- 邓小平同志部署和开展了一系列举措，如农业改革、工业化建设、鼓励个体私营、经济特区建设

1990

Stock Market
证券交易所开业



- Shanghai Stock Exchange was launched in 1990
- Shenzhen Stock Exchange was launched the next year

- 1990年上海证券交易所成
- 1991年深圳证券交易所开业



LIVING CONDITIONS TOOK A QUALITATIVE LEAP 生活跃进摩登时代，变得更丰富多彩

- People's living standards improved significantly
 - A new "Four big items" emerged, BB pagers became prevalent, Volkswagen Santana's as a sign of wealth
 - Strong desire for and diverse ideals of beauty
 - "Western" lifestyles got admired, going abroad for university or migration as something to brag about
- 生活水平拥有质的飞跃
 - 新的“四大件”出现，BB机流行，大众桑塔纳成为财富的象征
 - 对美和时髦的追求更强烈，审美偏好逐渐多样
 - 西式生活受追捧，海外留学移民受羡慕





THEY HAD EXPOSURE TO DIVERSE CULTURAL INFLUENCES

当时，多元港台及海外文化开始流行，个人自主意识也逐渐被激发

- A trend of pop culture and celebrity idolatry from western, Hong Kong and Taiwan, e.g. Michael Jackson, Teresa Deng, Four Heavenly Kings
- 西方及港台明星受到喜爱，如MJ、邓丽君、四大天王



Brigitte Lin
林青霞



Teresa Deng
邓丽君



Four Heavenly Kings
四大天王



Michael Jackson
迈克尔·杰克逊

- Diverse life choices and stories progressively acknowledged through TV series, movies, music, etc.
- 通过不同的文化影视作品接触到更多不同的个人故事、生活选择和文化题材



Campus folk
校园民谣



Rock and Roll
摇滚文化



Love story
爱情片



Gang story
帮派故事



Family story
家庭片



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THEY HAVE EXPERIENCED RAPID CHANGE AS A DRIVER OF ENORMOUS OPPORTUNITY

在不断的变化和机遇中，他们的人生历程呈现出多样化的发展



Pictures from the Internet 图片来自网络

HASHTAGS FOR THIS GENERATION

他们的代名词

The 1st generation to get rich

Exposure to western culture and lifestyle

Free to choose jobs and relationships

Houses, cars, money, stocks

Open, compatible and flexible

Pioneering spirit to seek out change

Pursue quality living, willing to spend

先富起来的一代

西方文化和生活方式流入

自主择业，自由恋爱

房子，车子，票子

开放包容

开创精神，谋求发展

追求生活品质，舍得消费

How these values play out in their current lives

这些价值观念如何影响当下的生活



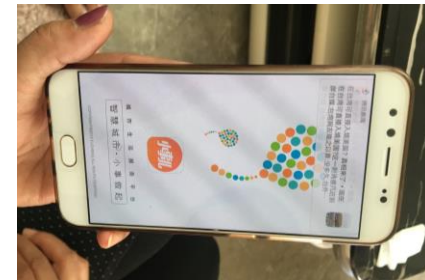
Develop and invest in hobbies they like to fulfill personal enjoyment
发展自己喜欢的兴趣爱好，愿意投入精力和金钱，享受其中



Confident in China's economy and love to grasp market opportunities, many trade stocks and shares online
对中国的经济和发展有信心，爱拼爱博，很多是资深股民



A more equal power relationship with their children, encourage and support children's thoughts and dreams
更民主和尊重孩子意愿的一代父母，愿意鼓励和支持孩子的梦想



Open to new things, keen to new technology and experience
喜爱尝新，对新科技和新体验兴趣浓厚

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HERE ARE THE GENERATIONAL VARIATIONS IN SENIORS' CORE VALUES BROUGHT BY DIFFERENT FORMATIVE JOURNEYS

三代人不同的风雨历程，打造了他们同中有异的价值观“基本盘”



WITNESS OF REVOLUTION
革命见证者



TOUGHENED NEW-CHINA 1ST GENERATION
百炼成金建国一代



THE OPENING UP NEWBORNS
改革开放新生儿

Core values
核心价值观
基本盘

Hard-working & enduring hardships 吃苦耐劳
Altruism & selfless devotion 为人民无私奉献
Collectivism 无我的集体主义

Pragmatism 务实
Self-renewal & struggle 自强不息
Adaptability 适于改变

Individualism & self-reliance 个人自主
Open-minded 开放多元
Pioneering spirit 开创精神

Formative years
个性形成期

1949 - 1965
Hardship & poverty 艰苦贫困

1966 - 1978
Twists & turns 波折动荡

1979 - 1992
Openness & prosperity 开放繁荣

Life experience
生活环境

- Planned economy 计划经济
- Scarcity in material supply 物资贫乏

- Slow economy 经济发展迟缓
- Ideological sustenance 意识形态寄托

- Economic take-off 经济起飞
- Modernization 现代化生活

Popular culture
文化宣传

- Revolutionary icons 革命英雄
- Moral models 道德模范

- Political propaganda 革命政治宣传
- The cult of Mao 毛主席崇拜

- Diverse overseas influences 海外文化
- Individuality 个人意识

SEEING THE NEW NORMAL: THE EVOLUTION OF THEIR VALUES

把脉新常态：
底层价值观在当代价值观的浸润下，
交融迭代



**WITH SOCIAL CHANGES OVER THE TIME,
MODERN VALUES HAVE GRADUALLY EMERGED**

时代的变化日新月异，
滋生出了新的价值观念

Consumerism

消费主义

Individuality

彰显自我

Self-interest

利己考量

Pleasure-seeking

享乐文化



THESE IDEAS ARE EVOLVING SOME OF THE SENIORS' CORE VALUES, BLENDING INTO A NEW NORMAL AROUND FOUR THEMES

这些新观念不断浸润着老龄化群体的价值观“基本盘”，融合产生四大“新常态”

New values evolve alongside social changes 社会变动带来的新价值

Consumerism 消费主义

Self-expression 彰显自我

Self-interest 利己考量

Pleasure-seeking 享乐文化

A NEW NORMAL 新常态

**CONSUMPTION
CLASSIFICATION**

消费要分级

Smart & selective purchase
能省则省，该花则花

Frugality 勤俭节约

**BLEND IN,
BUT WITH SPARKLE**

逐波中闪耀

“A special star in the milky way”
做集体的一份子，但也要发光

Collectivism 集体为先

**REALIZATION OF
SELF & OTHERS**

成就你我他

Fulfill others, fulfill me too
成全他人，也成就自我

Dedication 奉献利他

**ENJOYMENT WITH
COMMITMENT**

拼搏式享乐

Play really “hard”
认真去玩乐，严肃对待兴趣与娱乐

Diligence 吃苦拼搏

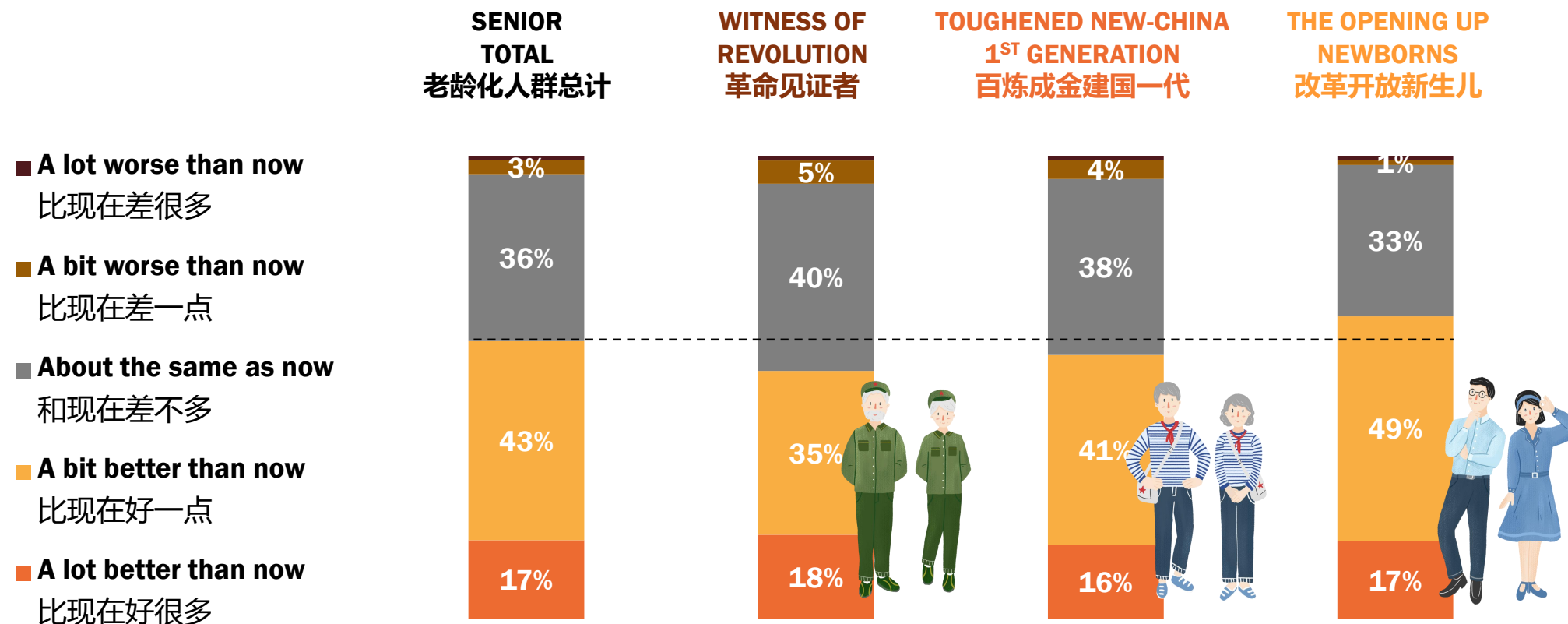
Deep-rooted core values established in their formative years 源自个性形成期的价值观基本盘

SENIORS ALL EXPECT THEIR QUALITY OF LIFE WILL BE MAINTAINED, THE MAJORITY (60%) BELIEVE IT WILL IMPROVE

首先，三代人大都预期生活品质不会变差，60%认为会更好

ANTICIPATED CHANGE IN QUALITY OF LIFE IN THE NEXT 3 YEARS

认为未来3年生活品质会如何变化



ADMIRATION OF FRUGALITY IS DIMINISHING, GENERATION BY GENERATION

他们认可通过物质消费来获得更好生活的理念；省钱的观念虽然仍被崇尚，但正随着代际而逐步弱化

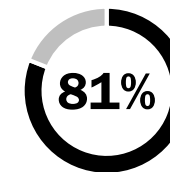
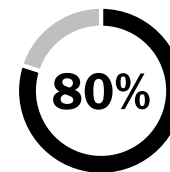
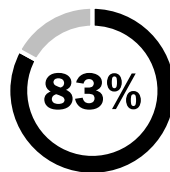
WITNESS OF
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1ST GENERATION
百炼成金建国一代

THE OPENING UP
NEWBORNS
改革开放新生儿

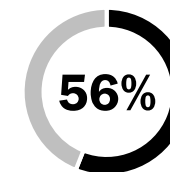
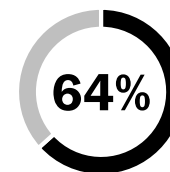
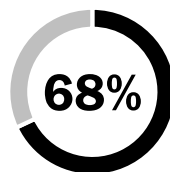
Material pursuits 物质追求

Money is important as it can bring a better life
金钱很重要，可以带来更好的生活



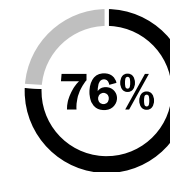
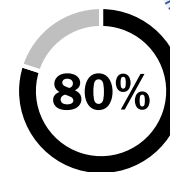
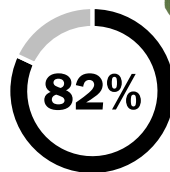
Frugality 节俭

I save as much as possible, and pick products with low prices
钱能省就省，要买价格低的



No waste 不浪费

There is no need to change products when they can still be used
只要东西还能用，就没必要换新的



ATTITUDES TO CONSUMPTION DIFFER ACROSS THE GENERATIONS

三个代际中，都出现了明显的消费分级现象

Consumption classification
消费要分级

Blend in, but with sparkle
逐波中闪耀

Realization of self & others
成就你我他

Enjoyment with commitment
拼搏式享乐

WITNESS OF REVOLUTION
革命见证者



TOUGHENED NEW-CHINA
1ST GENERATION
百炼成金建国一代



THE OPENING UP
NEWBORNS
改革开放新生儿



Careful in spending
Buy basics & functions
Generous with their children
谨慎花钱的一代人
功能和基础需求为主，舍得为晚辈花钱

- Buy practical goods with basic functions
- Save for pension or next generation
- Children frequently gift stuff
- 购买基本生活用品，功能性考量为主
- 为养老和下一代存钱
- 子女经常送礼孝敬

Penny-wise
Make every penny count
Compensatory consumption
懂得精打细算
该出手时再出手，补偿性消费多

- Rational, but not conservative
- “Making it up” is trending
- Occasionally pay premium for the things they really need or like
- 理性消费，但不保守
- 通过消费弥补过往生活的遗憾
- 时而为真正喜欢或需要的东西花大钱

Open to consumerism
Value quality and “face”
More differentiated segmented needs
积极拥抱消费主义
讲究品质和体面，符合消费分级大趋势

- Buying goods as a way of quality living, spend beyond life necessities for pleasure
- Brands matter for “a presentable image”
- Increasing diversified needs
- 为品质和乐趣而消费，不只是必需品
- 注重品牌选择，体现品位和体面
- 消费需求更多样化

Consumption
classification
消费要分级

Blend in, but
with sparkle
逐波中闪耀

Realization of
self & others
成就你我他

Enjoyment with
commitment
拼搏式享乐

COLLECTIVISM MAKES THEM KEEN ON SOCIAL ACTIVITIES, WHILE INDIVIDUALISM MEANS THEY ENJOY BEING A STAR

成长于集体主义的环境，当下的他们也热衷于社交活动，同时，受个人主义的影响，他们也乐意在群体中展现真我和个性，无惧瞩目或异议

SOCIALLY ACTIVE ONLINE & OFFLINE
线上线下社交活动都很丰富

**AVG. ACTIVE
WECHAT GROUPS**
平均活跃微信群数量

7.4

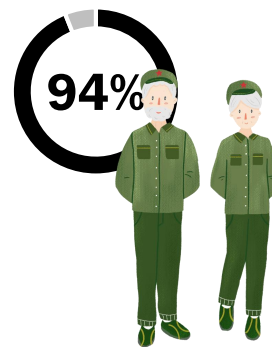


BEING WHO YOU ARE INSTEAD OF FOLLOWING
忠于自己的个性和主见

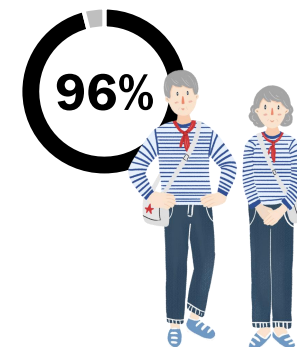
Individuality 彰显自我

People must have their own personalities & thoughts
人必须要有自己的个性和想法

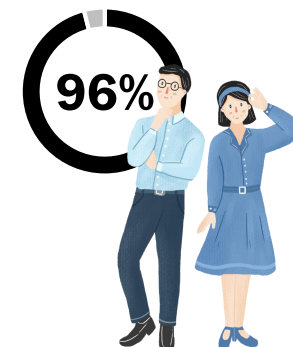
**WITNESS OF
REVOLUTION**
革命见证者



**TOUGHENED NEW-
CHINA 1ST GENERATION**
百炼成金建国一代



**THE OPENING UP
NEWBORNS**
改革开放新生儿



Pictures from the Internet or fieldwork 图片来自网络或访问

Wavemaker

A GLIMPSE INTO HOW THEY SHINE 看看他们如何做“夜空中最亮的星”

Consumption
classification
消费要分级

Blend in, but
with sparkle
逐波中闪耀

Realization of
self & others
成就你我他

Enjoyment with
commitment
拼搏式享乐



I didn't want to be like others when I was younger. When I saw people wear like me, I would just change my look. Now it's the same, so my friends always tease me that I like to show off by wearing clothes different from them.

Aunt Zhang, 53 y/o, Beijing

我年轻的时候就是，只要看到有人跟我穿的一样，我马上不穿。现在也是，我的朋友聊起来就说，我爱臭美，要穿的跟她们都不一样。

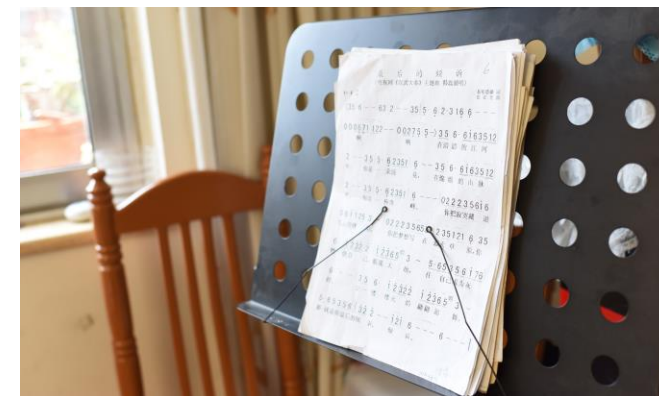
张阿姨，53岁，北京

Lots of people asked me to join the dance teams, but I said no, because I'd like to be free after working for a lifetime. My dance team now is different from others. The attendance is not mandatory, you can just go when you want, that's why I joined.

Aunt Liang, 62 y/o, Yinchuan

好多人就让我参加舞蹈队之类的，我说不，我工作被管了一辈子，现在想自由一点。但像我们队，它和别的舞蹈队不一样，要求不严，想去就去，不想去就不去了。

梁阿姨，62岁，银川



For me, it's about enjoying life and doing whatever you want now. One thing for me is singing. We would go to KTV and sing those songs that would give you ratings. I feel happy when I get over 80 or 90.

Uncle Chen, 72 y/o, Qujing

现在的晚年只有一个心思，就是要活得潇洒，自己想干的就去干。对我来说，一个是唱歌，我们会去到KTV，里面有的歌曲是打分的，能够打到90分、80多分以上的，就满足了。

陈叔叔，72岁，曲靖

SENIORS CONTRIBUTE TO THEIR FAMILIES AS WELL AS TO SOCIETY

日常生活中，三代人都在继续为孩子、家庭和社会付出

Dedication to their children, by generation

“养儿一百岁，长忧九十九”——无论多老，始终为孩子付出

Contribution to society

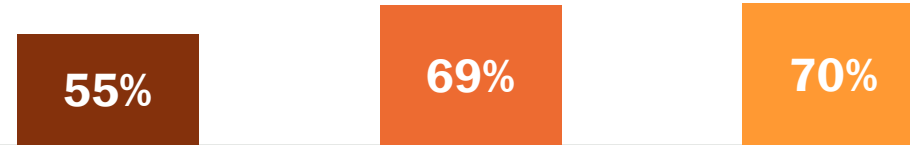
同时奉献社会

Help or support their children
帮助支持孩子的比例

WITNESS OF REVOLUTION
革命见证者

TOUGHENED NEW-CHINA 1ST GENERATION
百炼成金建国一代

THE OPENING UP NEWBORNS
改革开放新生儿



Family chores
做家务

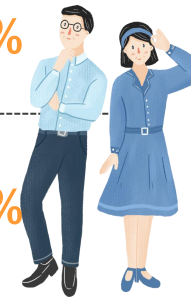
29% 43% 46%

Look after grandchildren
带孩子

36% 45% 21%

Financial support
经济上补贴子女家用

19% 24% 30%



积极活跃做志愿者
Active volunteers



Pictures from the Internet 图片来自网络

Consumption classification
消费要分级

Blend in, but with sparkle
逐波中闪耀

Realization of self & others
成就你我他

Enjoyment with commitment
拼搏式享乐

WE OBSERVED THAT YOUNGER SENIORS FEEL LESS OBLIGATED TO HELP TAKE CARE OF THEIR GRANDCHILDREN

但可以看到，对于带孙辈这件事，年轻新老人的“包袱感”在慢慢降低

Consumption classification
消费要分级

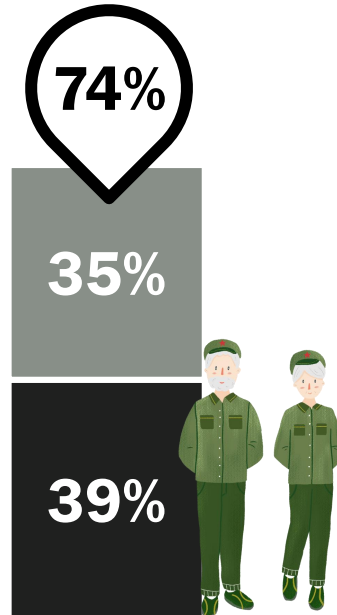
Blend in, but with sparkle
逐波中闪耀

Realization of self & others
成就你我他

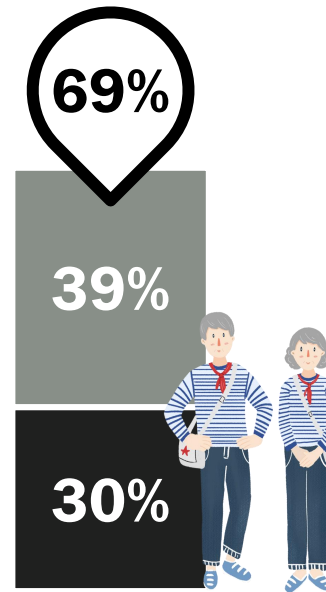
Enjoyment with commitment
拼搏式享乐

It is my duty and responsibility to help my children look after my grandchildren
帮子女带孩子也是我的责任和义务

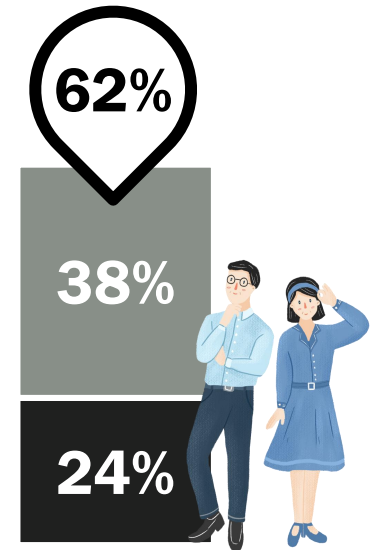
WITNESS OF REVOLUTION
革命见证者



TOUGHENED NEW-CHINA 1ST GENERATION
百炼成金建国一代



THE OPENING UP NEWBORNS
改革开放新生儿



■ Strongly agree ■ Somewhat agree
非常同意 比较同意

THEY ASPIRE TO BUILD A GREAT LIVE FOR THEMSELVES

他们开始更多地关注自我，期待更自由地“做自己”，成就新人生

Consumption
classification
消费要分级

Blend in, but
with sparkle
逐波中闪耀

Realization of
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Enjoyment with
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Feelings or expectations about retirement
对于退休的感受或期待

57% More freedom and free time
觉得更自由了，可自由支配的时间多了

48% Chance to do what I want
终于可以做想做的事情了

42% More possibilities to enrich life and try
different things
觉得生活可以更丰富了，可以尝试不同的事

**Eager to re-invent themselves and live life
to the fullest**
在人生第二场尽兴而活

**BEING WHO I AM
WITHOUT CONSTRAINTS**

**不再受限
自我释放**

**RESTORING DREAMS
WITH NO REGRETS**

**不留遗憾
重拾梦想**

**SEIZING THE DAY
WITHOUT HESITATION**

**再不错过
把握当下**

THEY ENRICH THEIR LIVES WITH LEISURE ACTIVITIES

他们用丰富的娱乐休闲来充实自己的生活

Consumption classification
消费要分级

Blend in, but with sparkle
逐波中闪耀

Realization of self & others
成就你我他

Enjoyment with commitment
拼搏式享乐

Daily leisure activities 日常休闲

Avg. number of leisure activities spontaneously mentioned
通常会参加的休闲活动
人均自主提及数量

4.9

TOP 5 activities 五大主流活动

Walking 散步, 快走	74%
Watching TV 看电视	60%
Listening to music 听音乐	30%
Going online 上网	30%
Tea 喝茶, 品茶	24%

Travel 旅行

Inbound travel
境内游

67%

Have travelled in Mainland China
有过境内游

2.8

Avg. frequency per year
平均每年次数

Outbound travel
境外游

24%

Have travelled out of Mainland China
有过境外游
(包括港澳台)

1.0

Avg. frequency per year
平均每年次数

Learning 学习

22%

Been to activity center or University for the Elderly in the past month

过去1个月内去过
老年活动中心/室/老年大学



YOUNGER GROUPS ARE MORE ENERGETIC AND TAKING PART IN MORE ACTIVITIES

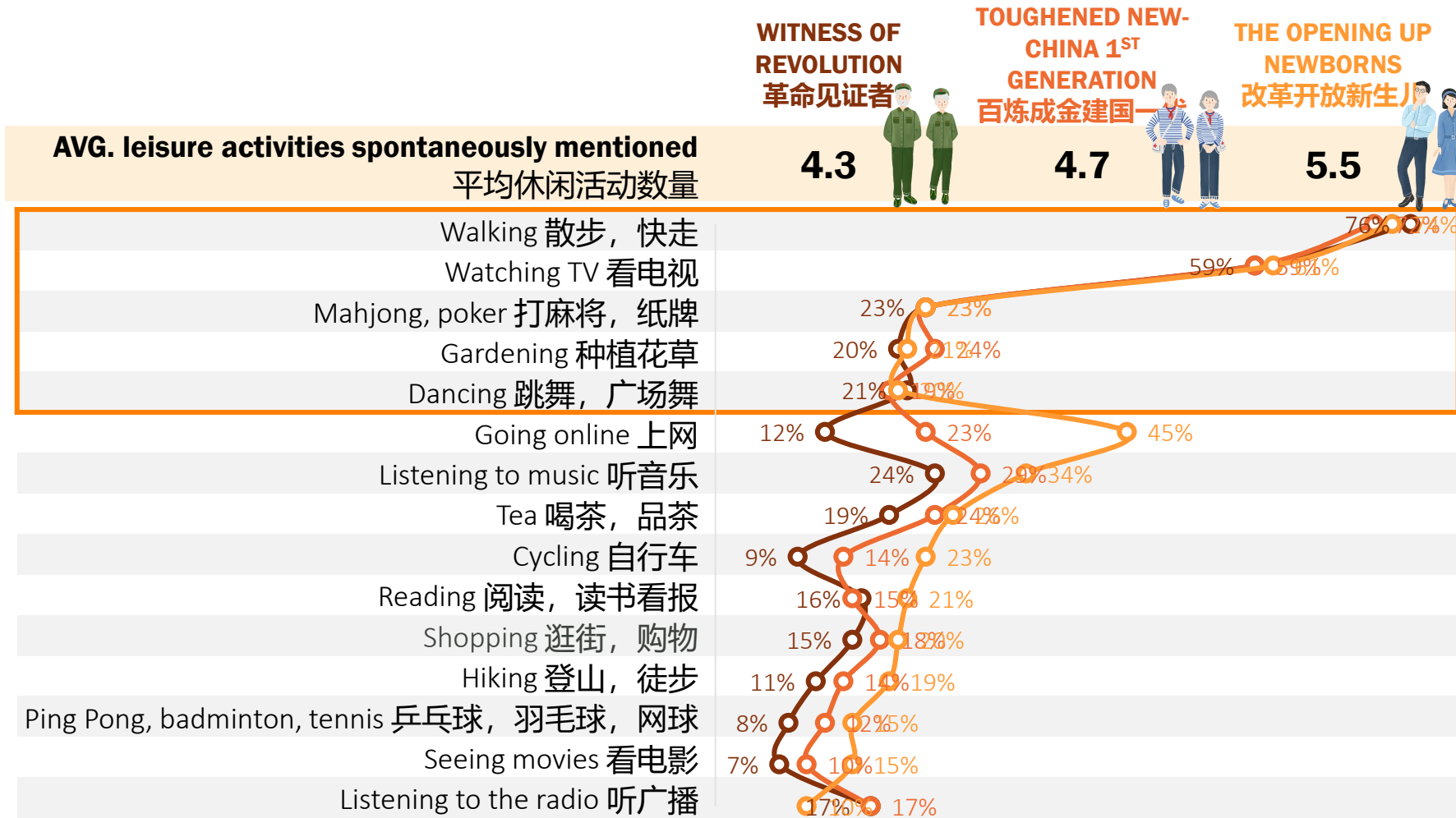
越年轻的代际展现出了更强的活力，积极参与和体验不同的活动

Consumption classification
消费要分级

Blend in, but with sparkle
逐波中闪耀

Realization of self & others
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Enjoyment with commitment
拼搏式享乐



Top 5 shared interests
五大跨越年龄界限的爱好

The younger, the more modern and more active
越年轻, 越摩登, 越活跃

THEY EMBRACE THESE ACTIVITIES, OFTEN LOOKING TO 'UPSKILL'

他们严肃认真地对待玩乐，一如既往拼搏向上，不仅是装备党，也积极做专业党

Consumption classification
消费要分级

Blend in, but
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Workout fanatics in the parks
公园里的健身“狂魔”



Impressive Yoga poses
挑战瑜伽动作



Professional riding equipment
专业骑行装备



Elaborated travel journal
精心制作的旅游游记



Package tour with premium cameras
专业摄影团



Certificates and win in contests
资质认可和比赛获奖

THREE SENIOR GENERATIONS HAVE DIFFERING ATTITUDES TO LIFE

由于“基本盘”的差异，在新时代下，造就了三代人不同的生活态度

Be simple
Be dutiful
Feel at ease
质朴、尽责、舒心



**WITNESS OF
REVOLUTION**
革命见证者

Be practical
Be circumspect
Don't fall behind
务实、精明、不落后



**TOUGHENED NEW-CHINA 1ST
GENERATION**
百炼成金建国一代

Be independent
Be open-minded
Be sophisticated
独立、开放、讲究



**THE OPENING UP
NEWBORNS**
改革开放新生儿

TO TRULY UNDERSTAND SENIORS' MINDS, NEEDS & BEHAVIOURS, IT IS ESSENTIAL TO KNOW THEIR CORE VALUES, EVOLVED VALUES, & GENERATIONAL VARIATIONS

因此，只有关注价值观的“基本盘”、融合了新观念的“新常态”、以及代际差异，我们才能真正理解老龄化群体的观念、需求以及行为



CORE VALUES
掌握基本盘

EVOLVED VALUES
把脉新常态

**GENERATIONAL
VARIATIONS**
识别代际差

These three elements are the key to unlock the silver economy.

Wavemaker is committed to working with brands in various industries, to build a better ageing society together.

价值观的这三大元素是解锁老龄市场兑现其商业潜力的钥匙。
蔚迈致力于携手各行各业的参与者，共建未来的美好社会。

FOLLOW OR CONTACT US FOR MORE INSIGHTS AND SOLUTIONS ON SENIORS

欢迎关注报告的持续更新，以及联系我们获得更多洞见和营销支持

CHAPTER 1 第一篇章	REVISITING SENIORS IN CHINA 重新“遇见”中国的老龄化群体	Oct. 2019
CHAPTER 2 第二篇章	THE HIDDEN VALUE AND POWER 潜藏的商业价值和影响力	Jan. 2020
CHAPTER 3 第三篇章	UNLOCKING THE SILVER ECONOMY 银发经济的基本盘和新常态	Mar. 2020
CHAPTER 4 第四篇章	SHARING PERSPECTIVES FROM EXPERTS ACROSS INDUSTRIES 各界共谈银发经济，探索解决方案	May. 2020
EPILOGUE 番外	PASSING ON THE WISDOM OF A GENERATION 他们走过风雨，他们依然年轻	Jul. 2020

APPENDIX:

**DEFINITION OF SENIOR GENERATIONS IN CHINA
RESEARCH FRAMEWORK
PRODUCER INTRODUCTION**

附件：
代际定义
研究框架
出品方介绍

WE HAVE REDEFINED THE OLDER GENERATIONS BASED ON THE SOCIOCULTURAL CONTEXT OF CHINA

考虑到中国的特殊性，我们“重新”定义和划分了老龄化群体

	1	2	3
	WITNESS OF REVOLUTION 革命见证者	TOUGHENED NEW-CHINA 1ST GENERATION 百炼成金建国一代	THE OPENING UP NEWBORNS 改革开放新生儿
	“A cog in the machine” to create collective value 一颗创造集体价值的螺丝钉	Missed opportunities but now restarting life 错失芳华但重启人生	Benefiting from economic and cultural opening 经济文化开放的受益人
Birth years 出生年份	1934 - 1950	1951 - 1963	1964 - 1977
Formative years 个性形成期	1949 - 1965 Hardship & poverty 艰苦启程	1966 - 1978 Twists & turns 波折动荡	1979 - 1992 Openness & prosperity 开放繁荣
Age now 目前年龄	70 - 86 y/o Report focuses on 本报告聚焦 70 - 77 y/o	57 - 69 y/o	43 - 56 y/o Report focuses on 本报告聚焦 50 - 56 y/o

TO GAIN A HOLISTIC PICTURE OF CHINA'S AGEING SOCIETY, WE COVERED ALL ACCESSIBLE SENIORS, WITH DATA PROJECTION TO NEARLY 115 MILLION CHINESE POPULATION

在研究中，我们尽最大限度地覆盖了中国的老龄化群体，数据推及近1.15亿中国人口，旨在全面了解中国老龄化社会

- Look at “current” and “future” seniors

Nearly 30 years age range, people born between 1943 and 1970, now aged from 50 to 77 y/o

- Consider cultural diversities in different regions of China

Cover 7 regions, i.e. North West, South West, Middle, South, East, North East, and North

- Consider city tier differences

From Tier 1 to Tier 3

Note: This study covers different types of seniors for offline fieldwork, but excludes those in very poor health condition who are inaccessible for survey (e.g. severe diseases, long-term bedridden patients)

- 不仅着眼于现在，同时放眼未来

年龄跨越近三十载，1943-1970年间出生，目前50-77岁的人群

- 考虑到中国地域文化的多样性

涵盖西北、西南、华中、华南、华东、东北、华北七大区域

- 考虑到中国城市级别间的差异

覆盖一到三线城市

注意：本次研究实地考察和调研了不同类型的老龄化群体，但不包括研究无法接触到的健康极为不佳的人群（如严重疾病、长期卧床等）

OUR RESEARCH LASTED FOR 18 MONTHS TO THOROUGHLY UNDERSTAND SENIORS VIA 3 PHASES

历时18个月，分3个阶段，通过完善的研究框架，从深度和广度全景剖析老龄化群体

1 CULTURAL SCANNING & VALUE SYSTEM EXPLORATION 文化背景与价值体系探究

- Literature review to build context and feed hypotheses
- Anthropological method to discover how social changes influence value system
- Generational cohort analysis on seniors
- 文献综述及案头研究
- 人类学方法论探究社会变迁对价值观塑造的影响
- 针对老龄化人群进行世代族群分析

2 ETHNOGRAPHY TO DEEP DIVE 民族志挖掘

- Visited different cities from Tier 1 to 3
- Visited homes of different types of seniors across 3 generations
- 造访一到三线不同城市
- 实地入户深度访问不同类型和年代的老齡化群体

3 QUANTIFICATION TO VALIDATE 量化验证

- Face-to-face offline survey
- Across Tier 1 to 3 cities in 7 regions
- 线下面对面访问收集定量数据
- 覆盖7大区域的一到三线城市

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我们的观察与洞见

We believe there always is a better way to grow. We positively provoke growth for our clients by reshaping consumer decision-making and experiences through media, content and technology. The Wavemaker way is globally consistent. Fuelled by the world's most powerful consumer data, we understand where and how marketing can intervene decisively to help brands win more sales. Our 7,600 people across 90 markets have the deep knowledge, confidence and courage to provoke growth for some of the world's leading brands and businesses.

We are a part of GroupM, WPP's global media investment management company. Discover more on wavemakerglobal.com, [Twitter](#) and [LinkedIn](#), or follow us on Wechat at Wavemaker_China.

蔚迈相信，任何时候，总存在一种更好的增长方式。通过媒体、内容和技术的结合，我们重塑消费者决策和体验，激发增长。蔚迈由全球网络统一协同运作，在强大的消费者数据推动下，了解营销在何时何地、以何种方式为品牌赢得更多销售。蔚迈在90个市场的7,600名员工拥有深厚的专业知识，他们充满信心和勇气，为世界领先品牌和企业解锁增长的奥秘。

我们是WPP旗下全球媒介投资管理集团群邑的一部分，可以通过wavemakerglobal.com、[Twitter](#)和[LinkedIn](#)了解更多关于我们的信息，也可以关注蔚迈中国微信公众号Wavemaker_China。

PRODUCTION TEAM | WAVEMAKER INTELLIGENCE DEPARTMENT

出品团队 | 蔚迈 咨询与洞察团队

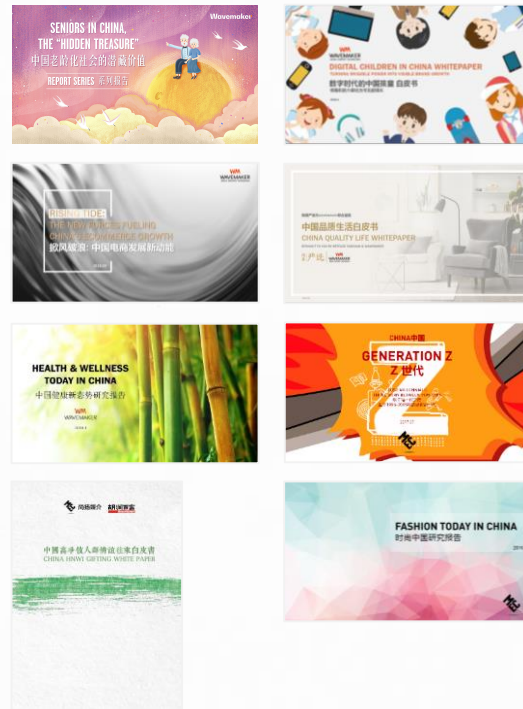
Our mission is not only to provide business consultancy and brand strategy for enterprises, but also to explore growth opportunities in different fields together with enterprises through knowledge co-creation and sharing.

团队的使命不仅是为企业提供商业咨询和品牌策略，同时致力于通过知识共创和分享，与各企业一同探索不同领域的增长机会。

REPORTS RELEASED 主要作品包括:

Seniors in China: The “Hidden” Treasure Report Series
 Digital Children in China
 The New Forces Fueling China’s Ecommerce Growth
 Quality of Life in China
 Health & Wellness Today in China
 Generation Z in China
 China HNWI Gifting Whitepaper
 Fashion Today in China
 etc.

《中国老龄化社会的潜藏价值》系列报告
 《数字时代的中国孩童》
 《电商电商发展新动能》
 《中国品质生活白皮书》
 《中国健康新态势》
 《中国Z世代》
 《中国高净值人群情谊往来白皮书》
 《时尚中国》
 等



Team of Seniors in China: The “Hidden Treasure” Report Series 本系列报告专项与撰稿负责人:



With growing ageing population, we are committed to investing into the future to build a better society.

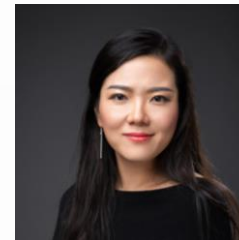
在老龄化社会的趋势下，探索共建美好未来将是持续投资的领域。

Those amazing seniors got me to see the possibilities of ageing society, a factful near future we can all shape together.

统计数字让我看到了老龄化社会的确真性，而叔叔阿姨们则让我感受到了未来无限的可能性。一起，来参与和创造这一同属于他们和我们的未来。



Linna Zhao
Team Head
 赵林娜
 部门总负责人



Linna is devoted to providing marketing consultancy with deep-dive into business problems and is keen to transform insights into growth opportunities.

Linna 善于诊断商业问题，提供营销和品牌发展咨询，热衷于将市场和消费者的洞察转化为品牌发展机遇。

Lyn Wang
Project Lead
 王琳琳
 项目负责人



Lyn is passionate in telling the stories behind the numbers and transforming data into business relevant findings and insights.

Lyn 乐于探索和观察，擅于挖掘数字和言语背后的含意，用简单生动的方式讲述发现和洞察，并从中找到对商业有价值的启示。

THANK YOU!

感谢阅读

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