

HIGHLIGHTS 报告重点聚焦

TODAY'S DIGITAL CHILDREN ARE TOMORROW'S CONSUMERS 孩童群体即将成为万众瞩目的新一代

In 3-10 years, this age group are going to graduate from high school, step out into society and become core target audience. What does this mean for the future of marketing?

他们在3-10年后即将步入社会(高中毕业),"正式"进入被重点关注的受众格局,这对未来而言意味着什么?

A UNIQUE GENERATION

他们是具有时代独特性的一代

Most Chinese children are the only child of the first "one child" generation. They have a unique historical label because of this – they are 'one of a kind'.

中国当下的孩童群体是第一代独生子女的独生子女,身为"独二代",他们身上有非常独特的历史标签和时代的影子

INFLUENCED BY POST-80S PARENTING

在八零后父母雄心勃勃的育儿观下成长

The values and lifestyles of today's children have been shaped by the development of society, from the consumption upgrade to the expansion of the middle class. The comprehensively "scientific" parenting values of post-80s parents have also influenced their perspective.

他们的价值观和生活形态由社会环境与经济发展 (如消费升级、中产规模化)和泛80后父母全方位的 "科学" 育儿观共同塑造

EARLY-MATURING, INDEPENDENT THINKING, AND EXPERIENCED

他们空前早熟、思辨、见多识广

Exposed to so many physical and digital experiences before they reach adulthood, this new consumer group will be hard to win. Brands need to start now if they want to seize the opportunity and build brand preference with this unique group. 他们注定会成为未来难以赢取的新新人群,现在开始关注他们,才能抢占先机建立品牌优势



THESE DIGITAL CHILDREN ARE UNTRACEABLE MAJOR CONSUMERS 他们拥有非凡的影响力

VISIBLE SPENDING POWER

"财务自由"的小大人

96%

have their own pocket money.

的孩子有自己的零用钱

INVISIBLE INFLUENCERS

他们的"隐形"影响力

Most of the time, parents' buying decisions are influenced by their children.

很多情况下,父母也希望通过购物来培养孩子的独立决策力

30-50%

of the elementary school students from Grade 4-6 and junior high school students buy online, but most do NOT have their own accounts.

的小学4-6年级和初中生会进行网购,但他们多数没有自己的独立账号

MORE CATEGORIES THAN EVER

儿童接触的品类越发广泛

Currently, marketers mostly pay attention to categories directly related to children, such as snacks and drinks.

目前,儿童市场更与儿童直接相关品类关联,如零食、饮料

The "irrelevant" categories (including fashion, electronics, skincare and travel) are no longer irrelevant.

而"间接"品类早已变得不再间接,比如时尚、电子产品、护肤、旅游等



REACHING DIGITAL CHILDREN REQUIRES DIVERSIFIED CHANNELS, CONTENT AND

他们接触着多元渠道、多样的内容与形式

THE CHALLENGE OF DIGITAL MEDIA

数字渠道的意义与挑战

In China, children are a huge group of internet users, but they are completely invisible. They use digital devices but a lot of them do not have their own digital ID. It is worth considering how precisely we can identify them via technical solutions in the future. 在中国,孩童是一个庞大的隐形互联网民群体。他们接触数字设备,但有较大比例没有专属的数字ID或身份,因而如何通过科技手段(如机器学习)更精准识别儿童用户是未来需要考虑的方向。

THE IMPORTANT ROLE OF OUT-OF-HOME MEDIA (OOH)

户外媒体的角色同等重要

Outdoor life is abundant for children of all stages. This means that OOH plays just as important a role as digital media in their life. A combination of OOH and digital media is the way to really optimize marketing efforts.

无论是哪个学级,孩童群体的户外生活都非常 丰富精彩,对户外媒体有非常高的接触频率。 户外媒体的重要性不亚于数字媒介,需要和数 字媒介精密组合来优化营销效果。

DIVERSIFIED CONTENT AND FORMATS

多样化的内容与形式

Digital children have mature tastes and are avid consumers of different types of content beyond those aimed directly at children.

当下的孩童群体对内容的消费呈现出明显的早熟趋势,随着年级的提升,他们越来越多的开始消费成熟的内容,接触的内容形式也愈加多样。

BUILDING SUSTAINABLE, INSPIRATIONAL BRANDS FOR FUTURE CONSUMERS 打造具有启发性和好感度的品牌, 以吸引这群未来的消费者

BRANDING IS IMPERATIVE

品牌建设变得更加紧迫

Digital children only know the abundance of information and product choices that face today's consumers. Furthermore, they are growing up with a more global outlook and higher expectations of quality and convenience than their parents. These children treat brands and products from all over the world objectively, although they have more faith in Chinese local brands.

中国孩童出生在选择过剩的时代,从小就接触更广阔的信息 也更加拥有国际视野。他们相对客观地对待不同国 家的品牌和商品,对中国本土品牌也充满信心。

As a result, global and local brands alike face unprecedented challenges in survival and growth.

对于所有企业和品牌而言,无论是生存和增长都无 疑面临着前所未有的挑战。

TO WIN SUCH FUTURE CONSUMERS, BRANDS NEED TO:

为了赢得未来的消费者,品牌需要:

1. Gain their awareness as early as possible 尽早进入他们的视野

NOTE: Brands must always respect legal and ethical guidelines when advertising to children at all development stages.

注意: 针对儿童市场, 品牌方需要遵循相关规

范与主流价值观的发展趋势

2. Build brand bias in the Priming Stage, a key stage for children. Seeding brand bias has a direct impact on conversion potential

在消费者决策路径的被动阶段打造品牌偏好,播种品牌力将直接决定品牌的未来

3. Invite them to create and define the future with a timeless core brand. Forward thinking is essential: you'll need to plan for human development in the future from AI technology to medical tech. 邀请他们参与共创品牌内核(即品牌长久持有的核心资产),不仅要考虑当下,也要考虑到人性的发展

(例如在智能科技与医疗科技的未来,对人"赋能"所带来的需求转变) 4.As the child grows, the brand must continue to:

品牌建设是一个永不停歇的旅程:

- Study their evolving changes in life 关注孩童不同的成长阶段
- Stay relevant to children's different stages 无论是对哪个阶段,都具有相关性和意义
- Keep innovating to build brands inspiring and connecting with child of different stages 保持创新力,缔造对孩童不同阶段以及未来具有启发性和好感度的品牌



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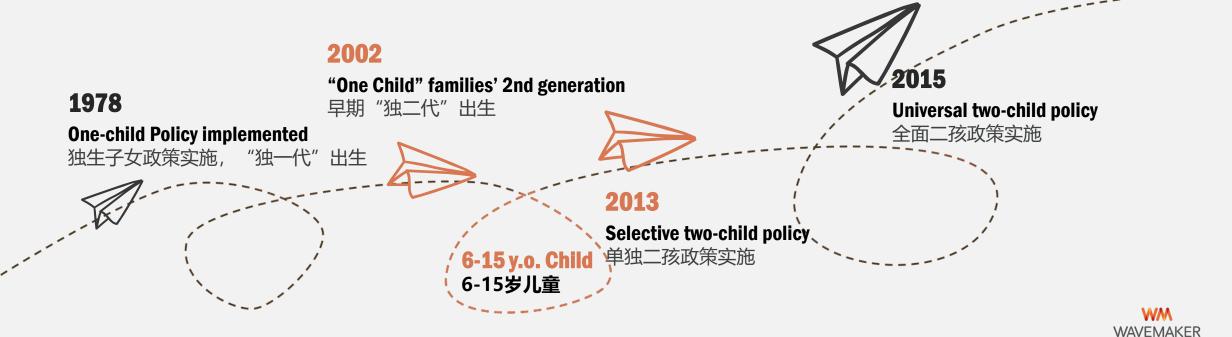


'KIDS AGED 6-15 IN CHINA ARE TRULY 'ONE CHILD POLICY' FAMILIES; -THEIR PARENTS WERE THE FIRST 'ONE CHILD' GENERATION, THEY ARE THE LAST

作为"独二代",当下的6-15岁儿童出生于中国第一代独生子女家庭,年龄跨度落于 独生子女政策的终结

Almost 80% of parents in this study were born after 1978. They form the first generation born into the One-Child-Policy (OCP). Furthermore, their kids are the last generation born under the OCP.

此次研究中,6-15岁儿童的父母有近80%是78后。 他们正是中国的第一代独生子女。而他们的孩子则是 二胎政策实施前受独生子女政策影响的最后一代。





THIS IS A LARGE GROUP COMPRISING OVER 160 MILLION 6-15 YEAR OLDS

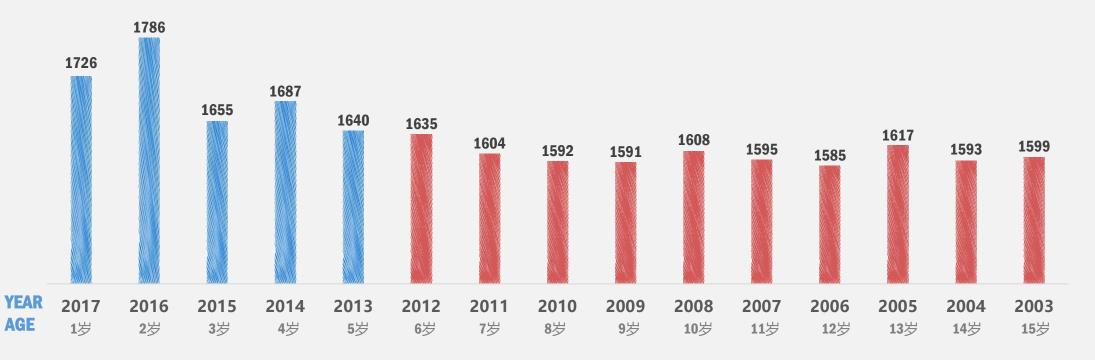
这是一个既有规模已达到1.6亿人口的庞大群体

FUTURE GENERATION 未来的儿童 KIDS AGED 6-15: 160 MILLION

6-15岁儿童: 1.6亿

BIRTH POPULATION (UNIT: 10THOUSAND)

历年出生人口 (单位:万人)







THEY ALREADY HAVE SIGNIFICANT BUYING POWER AS WELL AS STRONG INFLUENCE OVER THEIR PARENTS' DECISIONS

他们既是"财务自由"的小大人,又影响力非凡

96%

have their own pocket money

的孩子有自己的零用钱

	Average pocket money per month (RMB) 平均每月零花钱(元)	Average Chinese Lucky money (RMB) 平均压岁钱(元)
Kids 小学(1-3)	80	3,727
Tweens 小学(4-6)	103	3,233
Teens 初中	211	3,383

78%

of the time, parents' buying decision will be influenced by their children

情况下,父母愿意尊重孩子的购物决策

Categories include snacks & drinks, stationary, toys, apparel, shoes, skincare, toothpaste, digital device, sports products, books.

购物决策包含的品类为:零食饮料,文具/学习用品,玩具,衣服裤子,鞋子,护肤品,牙膏,电子数码产品,运动产品,书籍(不包括教辅书)



THEY ARE IMPORTANT ONLINE USERS WITH MANY ENJOYING INTERNET ACCESS SINCE AN EARLY AGE

他们很早就开始使用数字设备,已经是重要的互联网用户群

AGE ONLINE USAGE BEGAN

开始使用的年纪

34% 9 9 9 9 9 9 9	Use A Smart Phone使用智能手机	75
37% 🖁 🥛 🔮	Use A Computer使用电脑	
30%	Use A Tablet使用平板电	
87% 9 9 9 9 9 9 9 9	脑 Play Video Games玩电子游戏 🗪	75
83%	Watch OTV看电视	75
68% 8 8 8 8	Online SNS网上社交 💬	95





HOWEVER, THEY ARE 'INVISIBLE USERS' WITHOUT A CLEAR IDENTITY

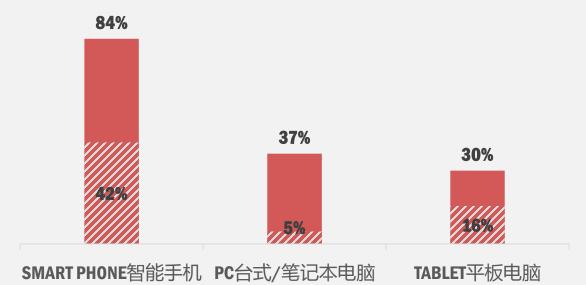
然而,他们却是极难被侦测到的隐形用户

MANY DEVICES USED BY CHILDREN DO NOT BELONG TO THE CHILD

孩子使用的电子设备有很多并不属于他们自己

ONLY A FEW HAVE THEIR OWN ACCOUNTS

且自己拥有的账号比例也很低



Own OTV Account 有网络视频账号 19% Own online shopping accounts 有网购账号 32%

■USE DIGITAL DEVICE使用的电子设备

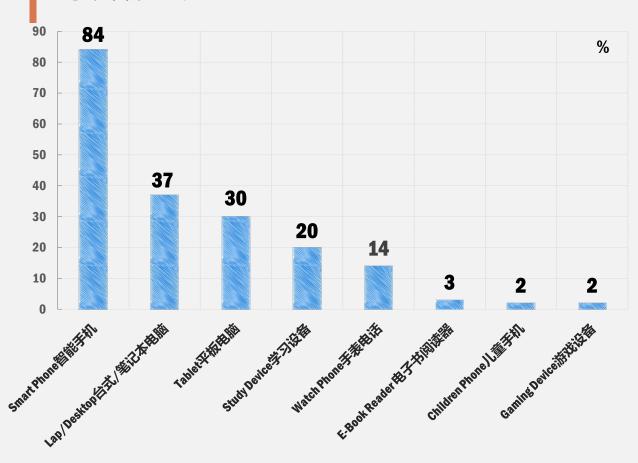
図OWN DIGITAL DEVICE自己拥有的电子设备

THEIR DIGITAL PROFILE ENABLES THEM TO DEVELOP INDEPENDENT THINKING FROM A YOUNG AGE

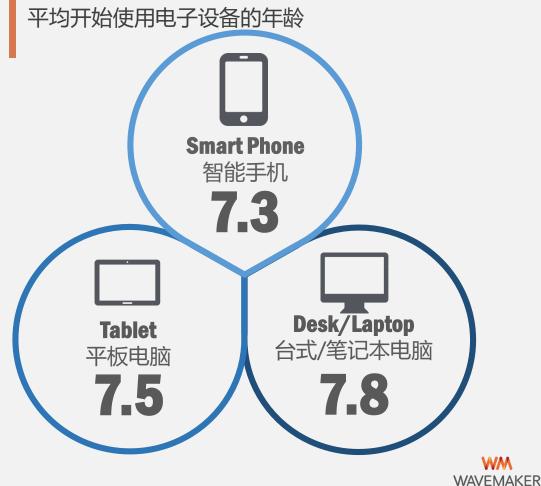
他们高度数字化,从小接触不同类型的APP和数字信息渠道,多维思辨从小养成

DIGITAL DEVICE PENETRATION

电子设备渗透率



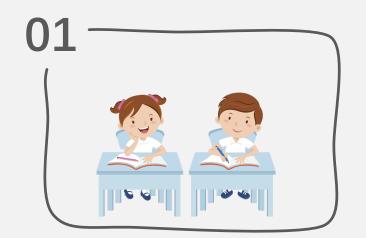
STARTING AGE OF USING DIGITAL DEVICES

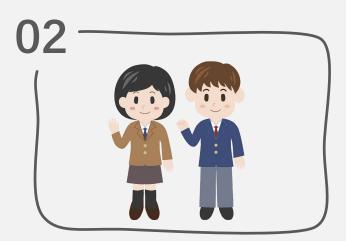




THEY ARE CATEGORIZED INTO 3 SEGMENTS FOR AGE & GRADES

、根据参与调研的孩子的年龄和学级,分为三个阶段







Kids

6-9 Y.O. 岁

Elementary School 1-3 grades

小学1-3级

Tweens

10-12 Y.O. 岁

Elementary School 4-6 grades

小学4-6级

Teens

13-15 Y.O. 岁

Middle School

初中





MULTIPLE RESEARCH TECHNIQUES ENABLE US TO DIG DEEPER: QUALITATIVE

为了研究数字儿童,我们进行了缜密的研究设计 - 探索阶段

EXPLORATION

探索方向

Qualitative 定性研究:

CHILDREN

Focus Group 座谈会

Sample: 12 groups, 9 children per group, from Tier1-2 cities

样本量: 12组, 每组9位, 来自一二线的不同阶段不同性别的孩童样本

	Kids 小学(1-3)	Tweens 小学(4-6)	Teens 初中
Boys 男孩组	2	2	2
Girls 女孩组	2	2	2

*Children are split into different groups in terms of different stage and interests.

根据孩童们的不同成长阶段和兴趣点,将他们分为不同的小组进行访谈.

MOMS

In-depth Interview 深访

In order to develop deep understanding of Post-80s parenting styles, we did further interviews with six moms who have kids/tweens/teens.

为了更深入得了解80后妈妈们的育儿观, 我们与6位不同阶段孩童的妈妈进行了深 入的探讨。

Note: All the Interviews were conducted after getting the approval by children's guardian.

注:参与本次研究的所有访问均在得到孩童监护人的允许后完成





MULTIPLE RESEARCH TECHNIQUES ENABLE US TO DIG DEEPER: QUANTITATIVE

量化验证阶段

GAIN BROAD PICTURE

了解大局

Quantitative 定量研究:

Pilot Test 实验性访问

CHILDREN

Two rounds of pilot F2F interview for kids/tweens/teens to test and optimize questionnaire design (including QNR length, expression, wording, etc.) in order to ensure the quality of pre-recruit in-home survey. 为了所有的问题能被所有阶段的孩童能很好得理解及认真作答,我们在正式访问前进行了两轮不同阶段孩子的实验性面访来测试及优化问卷。

Pre-recruit In-home survey 提前招募入户访问

MOMS+CHILDREN

The interviews were conducted with the child and his/her mom separately and simultaneously to ensure objectivity and accuracy.

为了真实客观得了解孩童和妈妈的想法和情况,在预约家访中,我们将妈妈和孩子隔离在不同空间,同时接受不同的访问员的访问。

Considering different level of understanding and concentration from different stage children, moms were asked to answer some daily routine questions on behalf of younger segments (esp. kids).

考虑到低年龄小孩的理解度和注意力集中度,对于小学生(尤其是小学1-3年级),有些日常生活相关的问题我们让妈妈代为回答。

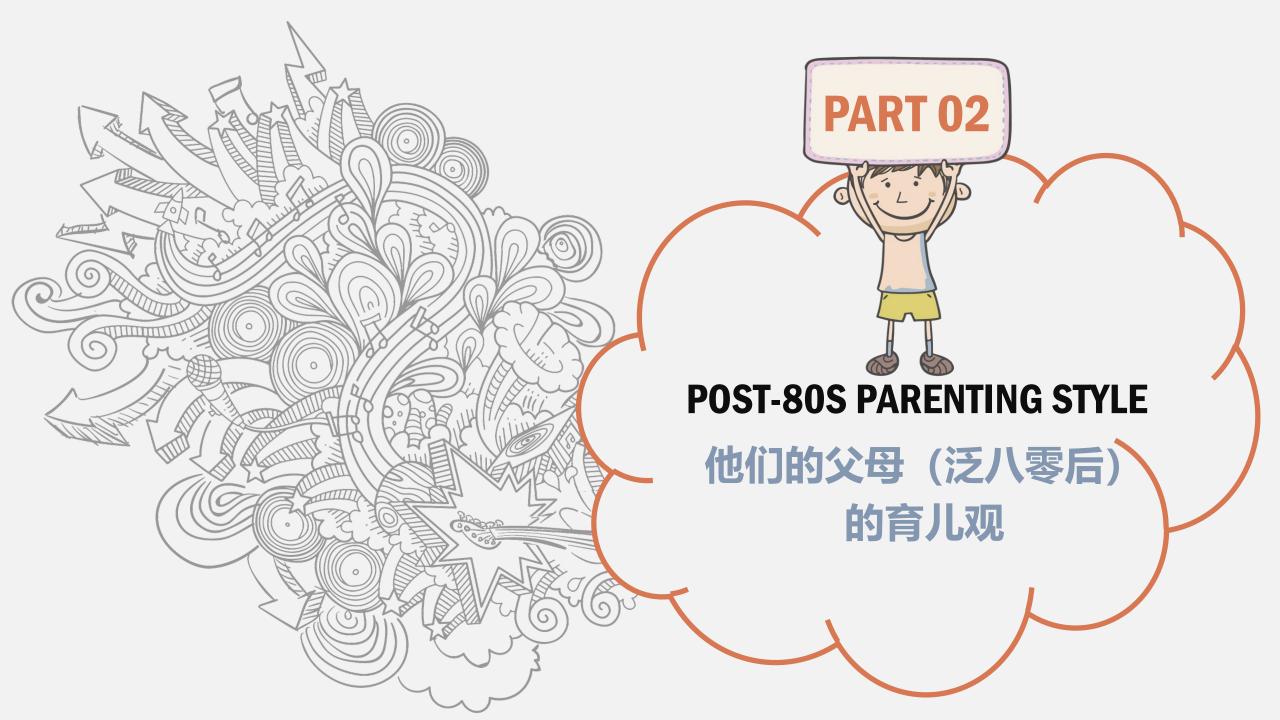
Sample: 2,076 6-15y.o. family from Tier 1-2 cities

<u>样本量:</u>2076个来自中国的1-2线城市的小学1年级-初中3年级 (6-15岁) 的儿童和他们的妈妈

Note: All the Interviews were conducted after getting the approval by children's guardian.

注:参与本次研究的所有访问均在得到孩童监护人的允许后完成





✓ POST-80S' ARE THE 1ST ONE CHILD POLICY GENERATION, THEY AGGRESSIVELY

泛八零后,中国第一批独生子女,人们眼中最雄心勃勃的一代,追求竞争与回报

AMBITIOUS, HARD WORKING, LOOK FOR RETURNS 雄心勃勃,努力奋斗,渴望回报

FACING INTENSE PRESSURE DUE TO INCREASING LIVING COSTS AND LIMITED OPPORTUNITIES

面临高压力,生活成本攀升和机遇不足,是肩负上下一代的夹心一族

BOTH INDIVIDUAL & COLLECTIVE: INDIVIDUAL MIND VS. COLLECTIVELY "FOLLOW"

个人主义和集体主义并存,意识上追求个人,但行为上更追逐群体选择和社会标准

		泛 80 后: 78s~80s			
POST 95s	EARLY P. 90s	POST 80s	POST 70s	POST 60s	POST 50s
95后	90后初代	80后	70后	60后	50后
1995-2005	1990-1994	1980-1989	1970-1979	1960-1969	1950-1959
GENERATION Z	CENERABUSD	Y O MOULLENWOALS	GENER!	E NOITA	



▶ POST-80S MOMS DEMAND THE MOST FROM THEMSELVES, BOTH IN THEIR PROFESSIONAL

LIVES AND BY BEING A GREAT WIFE AND MOM

其中,已为人母的女性更是奋力向前:一方面追求职业女性的成功和自我价值,一方面 在家庭中承担好妻子和母亲的角色

MODERN CHINESE WOMEN

现代女性的角色

MODERN OUTSIDE

现代的外在

Be confident, strong and independent 自信,坚强,独立

Desire to put their own needs ahead of family

渴望满足自我需求,而非为家庭牺牲

Continuous self-improvement 持续自我提升和精进



TRADITIONAL INSIDE

传统的内在

Family comes first 家庭为先

Fulfill multiple roles in family

在家中扮演好不同角色(如妻子、母亲、女儿等)

Must be a great mom 必须做一个好妈妈



THEY SHOW STRONG COMMITMENT, CONTRIBUTING THE MOST TIME TO RAISING THEIR CHILDREN

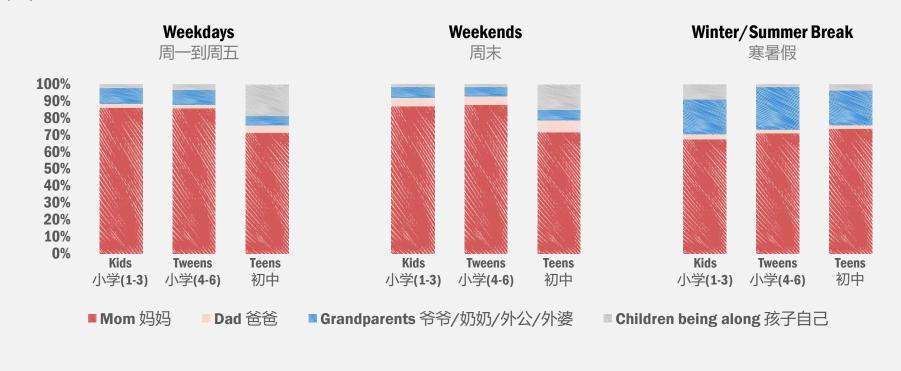
在育儿上,她们展示出强烈的尽责意识,认为自己的时间投入远高于其他家庭成员

WHO SPENDS THE MOST TIME WITH THE CHILDREN?

家中谁和孩子在一起的时间最长?

Within the 4/2/1 family structure, even though other family members share responsibilities in taking care of children, the busy multi-tasking moms are still taking the lead.

即便4/2/1模式下其他家庭成员也可分担照顾孩子,但忙于各种角色的妈妈们仍对育儿毫不含糊,亲力亲为。







THEY EXPECT THEIR HUSBAND TO TAKE AN EQUAL ROLE LEADING TO MORE PARENTING RESPONSIBILITY FOR FATHERS

她们希望与丈夫平等养育,期待对方能履行更多的教养责任



IN THE EYES OF A MOTHER, IS HE A GOOD FATHER OR NOT?

母亲觉得丈夫是不是一个好爸爸?

Father's overall performance is ok, but there is big space for improvement

整体表现还可以,但有较大提升空间

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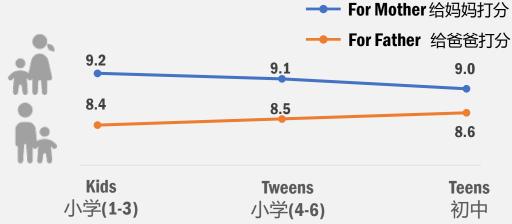
IN THE EYES OF A CHILD, IS SHE/HE A GOOD MOTHER/FATHER?

孩子觉得母亲/父亲是不是一个好妈妈/好爸爸? Along with child's development, the satisfaction of the father gradually increases, getting closer to mother's score 随孩子年龄的增长对父亲的认可度逐步提升,与妈妈的差 距逐步缩小

AVG. SCORE(OUT OF 10)

平均打分(满分10分)







✓ WHEN IT COMES TO CHILD-RAISING, THEY CLOSELY FOLLOW MODERN CONCEPTS, ~ESPECIALLY THE TREND OF SCIENTIFIC PARENTING

在育儿方面,她们遵循被社会公认的现代育儿观,紧随着科学育儿大潮

As first-time moms, post-80s women are always newbies. Facing various education concepts, they are constantly exploring and learning. They learn to develop multifaceted personas, embracing complexity through flexibility.

"初为人母"的泛80后妈妈在育儿上是"新人"。面对各种不同的教育理念,她们始终在摸索和学习。在她们身上,我们看到了对立、多面、复杂和变通。







"TIGER" MUM

"虎妈"上身

Comprehensive development, results-driven

全面培养,成果导向

Different KPIs at different stages

不同阶段有不同阶段的KPI

Hands-on manager, give the best

亲力亲为,给予最好

Scientific education, believe in professional

科学育儿,相信专业

360° EDUTAINMENT

360° 乐教

Seek ultimate edutainment at anytime, anywhere

随时随地, 寓教于乐

Give freedom, encourage independent decision-making

给予自由,鼓励主见

Focus on experience, and always look in the progress

注重体验,全面极致

EASY PARENTING

讲究捷径与平衡

Busy & hands-on, seek convenience/efficiency solutions

多面忙碌,寻求便捷效率

Hopes their child/children will have a bright future and a happy life at the same time

望子成龙,同时望子快乐

Fast-paced parenting BUT flexible and trying to balance

节奏虽快,但却张弛有度



THEY LOOK TO SCIENCE TO HELP INFORM THEIR HEALTH AND NUTRITION DECISIONS

~她们寻求科学的育儿方式,这渗透在各类消费品的选择中

Moms intend to choose "specific and professional" products for children. Taking children's toothpaste for instance, most mums in Tier 1 & 2 markets show high preference.

育儿要专业,妈妈们倾向于选择"针对性"的产品。以儿童牙膏为例,给小学生使用儿童牙膏的比例非常高。

USAGE % OF CHILDREN'S TOOTHPASTE

儿童牙膏使用占比

87%	61%	11%
Kids	Tweens	Teens
小学(1-3)	小学(4-6)	初中



USED FUNCTIONS OF CHILDREN'S TOOTHPASTE

目前使用的儿童牙膏功效

"I'd like to choose the product that is specific for children.

"我会给孩子买专业针对孩子的产品"

51 %	6	37 %	33%	28 %	19 %	13 %
Preve Tooth De 防蛀	ecay	All In One 多效合一	Fresh Breath 清新口气	Protect The Gum 护龈	Whitening 美白	Anti Dental Sensitivity 防敏感

CONSIDERATION FACTORS

儿童牙膏选择因素

60%	55%	53%	45%	35%
Safe Ingredient 成分安全	Function 功效	Reliable Brand 可靠的品牌	Flavor 牙膏的味道	With Fluoride or NOT 是否含氟
20%	18%	17%	12%	8%
Edible or Safe to swallow 可食用/吞咽	Packaging 孩子喜欢的包 装	Texture 膏体质地	Price 价格	Foreign Brand 国外的品牌



ESPECIALLY WHEN IT COMES TO DIETARY REQUIREMENTS

、尤其关乎孩子吃什么时,就变得更精细化了

Taking dairy products as an example, products fulfil different roles and nutritional needs across daily occasions.

以乳制品为例,不同时段的乳制品各司其职满足了差异化的角色和营养需求

USAGE OCCASIONS OF DAIRY PRODUCTS FOR CHILDREN

给孩子使用乳制品的场合

	Milk 纯牛奶	Soy Milk /Soy Milk Drink 豆奶/豆乳饮料	Kids' Milk 儿童牛奶	Milk Power 奶粉	Cheese Slices 片状奶酪	Flavored Milk 风味牛奶	Cheese Snack 奶酪零食	Yogurt 酸奶	Probiotic Drink 益生菌/乳酸 菌	Milk Drink 今到 你实	Almond/Walnu t Drink 杏仁露/核桃露	Coconut Drink 椰汁/椰奶
Usage Penetration% 饮用人群占比	91%	47%	<i>55</i> %	23%	28 %	<i>59%</i>	<i>35%</i>	93%	77%	49%	<i>39</i> %	48%
Breakfast Time 早餐	73%	72%	58%	57%	46%	41%	34%	31%	27%	24%	23%	17%
After Breakfast, Before Lunch 早餐后午餐前	12%	21%	20%	13%	21%	25%	23%	23%	25%	29%	23%	21%
Lunch Time 午餐	10%	15%	15%	13%	21%	24%	23%	19%	19%	33%	28%	29%
After Lunch, Before Dinner 午餐后晚餐前	13%	23%	24%	17%	43%	46%	49%	37%	44%	55%	44%	44%
Dinner Time 晚餐	14%	15%	18%	22%	21%	22%	20%	26%	25%	22%	33%	40%
After Dinner, Before Sleep 晚餐后临睡前	34%	11%	20%	52 %	11%	20%	17%	35%	29%	16%	21%	19%



THEY HOLD CONTRADICTORY VIEWS: THEY WANT THEIR CHILD TO GROW UP HAPPILY, BUT THEIR AMBITION TO MEET SOCIAL EXPECTATIONS MAY CONFLICT WITH THIS

然而,她们的意识体现矛盾心理: 既希望孩子轻松成长, 又雄心勃勃赶追各种育儿KPI

61%

I don't want my child working too hard and hope he/she can live at ease.

我不希望孩子太辛苦,希望他/她能过得轻松一些

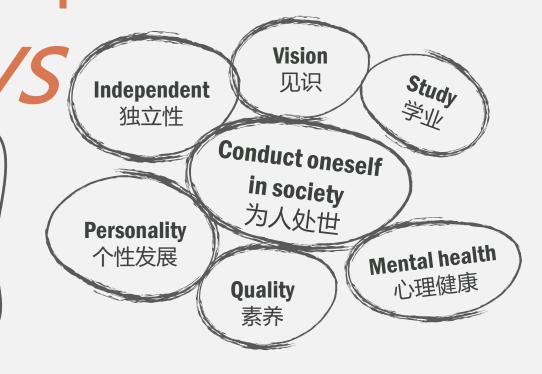
58%

I just want my child to be happy

我只要孩子快乐就好

"Our generation faces a tough living situation. I don't want my child to live like I do. I hope he/she will be at ease and happy. 我们这一代过的很累,我不想我的孩子像我一样。我希望它能过的轻松一点,开心就好。"

CHASING VARIOUS PARENTING KPIS 全面综合的育儿KPIS





THEY HAVE HIGH EXPECTATIONS FOR THEIR CHILDREN, ULTIMATELY WANTING

THEM TO SUCCEED

她们对孩子寄予厚望,希望孩子全方面发展,并获得成就

MOMS PAY ATTENTION TO VARIOUS ASPECTS OF CHILDREN'S DEVELOPMENT

妈妈关注孩子的方方面面,全面培养

人际关系 Human Relations

有爱心 Caring 创造力 Imagination 见识眼界 Experience & Vision

沟通表达能力 Communication Skills

自律/行为习惯 Self-Control

独立自主 Independent 礼貌教养 Manner

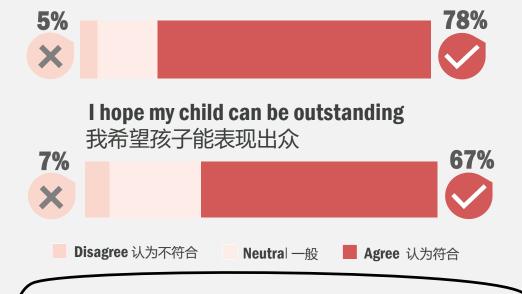
成绩学业 Study 艺术修养 Sense of Art

责任感 Ownership 心理情绪 Mood

兴趣培养 Hobbies

个性发展 Personalities
理财意识 Financial Awarenes





Such hope or expectation has become a common phenomenon regardless of region and income level

让孩子全方面发展的期望几乎成为了一个不分地域、

不分经济水平的普遍性现象

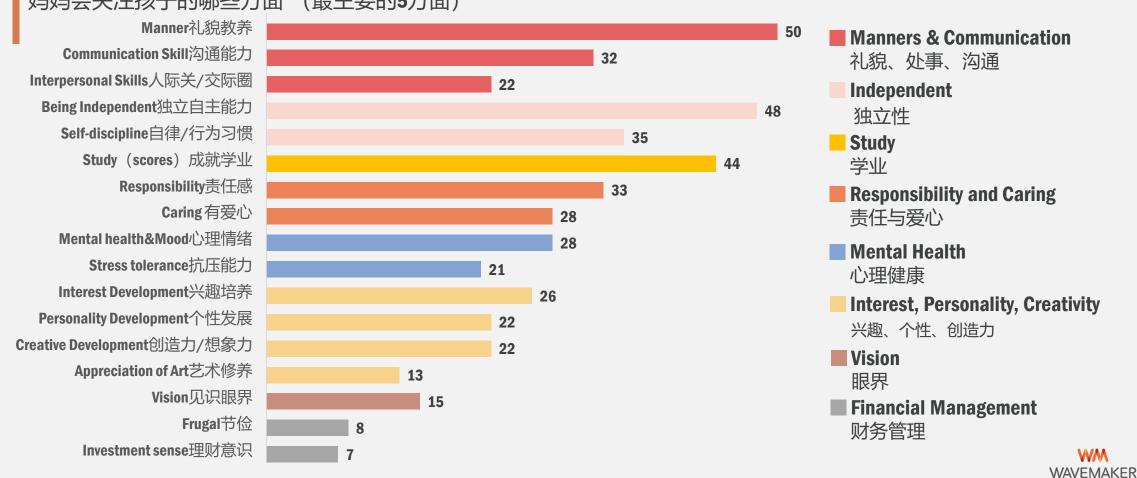


WHILE ACHIEVING GOOD GRADES IS STILL FUNDAMENTAL, MOMS ALSO PAY ATTENTION TO COMPREHENSIVE DEVELOPMENT

虽然学业仍是最重要的基础,但越来越重视全面培养

ASPECTS THAT MOMS PAY ATTENTION TO (TOP 5)

妈妈会关注孩子的哪些方面 (最主要的5方面)





"I hope he can be happy, do what he'd like to do."

"我希望他可以开心做自己。"

"I want him to be more extroverted, with high EQ and good social skills."

"我希望他是一个外向、EQ高、社交沟通能力强的人。"

"I let my daughter learn to play piano, so she can play it when she feels down or stressful."

"我现在给她学弹琴,我希望以后当她心情低落或压力大的时候,可以通过弹琴来缓解压力。"

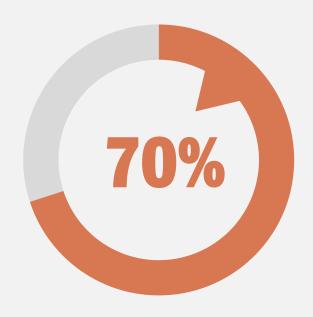
"I expect him to have morally sound values, as well as the courage to unswervingly pursue his own dream, so when he is old, he has no regrets."

"我期待他将来可以以正确的三观勇敢坚定地去追求自己的梦想,当老矣,无悔此生。"



OTHER THAN INTERNAL VIRTUES, PARENTS NOW ALSO PUT A LOT OF FOCUS ON THEIR CHILD'S APPEARANCE

内在塑造固然重要,但如今的家长也非常愿意花费精力提升孩子的颜值和气质



CLAIM TO PAY ATTENTION TO POLISHING THEIR CHILD'S APPEARANCE.

表示很注重培养孩子的颜值和气质

While appearance is valued more by moms with girls and in Tier 1 cities, for those with boys and in Tier 2 cities, the number is also high.

女生尤是,但男生也不能缺。一线更注重,但二线也不低。

MOMS OF BOYS 男孩妈妈	MOMS OF GIRLS 女孩妈妈	T1 一线城市	T2 二线城市
66%	74%	79%	67%





DEVELOPING LIFE EXPERIENCE IS ALSO IMPORTANT

除此以外,眼界和人生经历也不能少

Education is undergoing a huge transformation. Vision and experience have also become a major focus for parents.

随着对教育要求的全面升级,孩子的眼界和经历也成为了父母关注的一大重点。



I often take him to concerts, performances and exhibitions in order to improve his ability to appreciate arts.

我会经常带他去听音乐会、看文艺演出、看展览,以提高他的气质修养。

Taking studying aboard as an example, the primary goals are broadening vision, gaining experience, and being independent.

以出国留学为例,首要目的也不再是追求更好的教育资源

BENEFITS OF STUDYING ABROAD 出国留学的利益点

54%	49%	40%	34%
Broaden children's vision 让孩子开阔眼界	Enrich life experience 丰富人生经历	Increase children's independent ability 让孩子能够独立自主	Better educational resources 更好的教育资源
27%	24%	23%	16%
Better for children to learn foreign language 让孩子更好地掌握外语	Own more competitive advantage 回国后有竞争优势	Better living environment 更好的生活环境	Less study pressure 学习压力比国内小
12%	7%	4%	4%
Better school/better degree 国外的学校/学位更好	Hope the child will live abroad in the future 希望孩子以后留在国外	Intend to immigrate 有家庭移民的打算	There are relatives and friends abroad 国外有亲戚朋友在







ENABLING CHILDREN TO WIN FROM THE STARTING LINE IS DEEPLY ROOTED IN

PARENTS' MINDS

"让孩子赢在起跑线"已是常规认知,泛八零后更是有过之而无不及

My friends' children all started early childhood education when they were very little. So I let my child go to classes too. I don't expect him to learn much, but at least he gets to have this experience and interact with teachers and other children.

朋友的孩子都是很小就开始读早教,我就给我的孩子也报了班。 虽然不一定能学到什么,但起码能让孩子早点开始体验,和老师 和同龄的孩子互动。

There are many choices, such as training to be hosts and models.

I signed my child up for English classes given by foreign teachers,
and calligraphy classes.

现在很多班可以报名,比如主持人、小模特培训班。我给孩子报了英语外教课和书法课。

VARIOUS POPULAR EARLY CHILDHOOD EDUCATION CLASSES IN MARKET

市场流行的各类早教和婴幼儿班



My Gym
Physical + Intelligence



My Art
Artistic accomplishment



My Music Improvisation



3-4 y.o. Class

Meet yourself in the play



4-6 y.o. Class
Language and
Creative Expression



7-9 y.o. Class
Accumulation and use
of language



10-12 y.o. Class
Develop ways of thinking

Source of picture: http://sh.dreamaker.com.cn/course.html





✓ AS CHILDREN MOVE UP GRADES, ADDITIONAL EDUCATION SPENDING RISES

虽然课外教育的形式随着年纪增长会有变化,但教育花费是一项持续性的投入

AVERAGE EDUCATION SPENDING PER YEAR ASIDE FROM SCHOOL (RMB)

平均一个学年的额外教育花费 (人民币)

Kids 小学(1-3)

9,045

Tweens 小学(4-6)

9,666

Teens 初中

10,308

Such spending is slightly higher in tier 1 cities and on boys

一线城市以及男孩家庭的教育投入略多

T1	T2
一线城市	二线城市
12,111	8,643

Boys	Girls
男	女
10,051	9,277







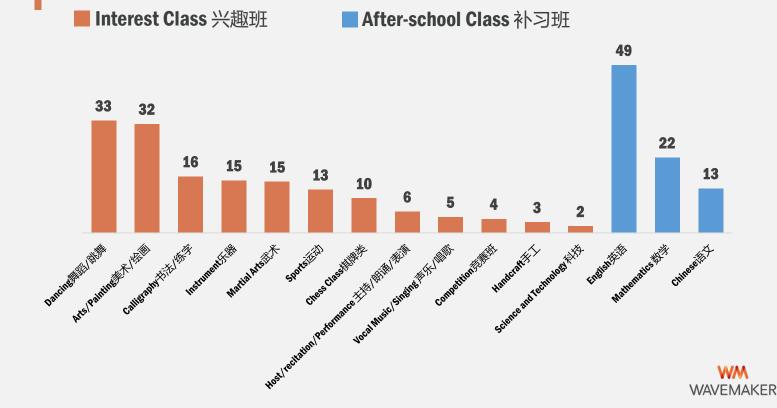
EXTRA-CURRICULAR ACTIVITIES ARE CORE ESPECIALLY FOR KIDS IN ELEMENTARY SCHOOL GRADE 1-3.

小学1-3年级更是启蒙教育的核心阶段,在此时,兴趣班和补习班同等重要



INTEREST & AFTER-SCHOOL CLASSES ARE EQUALLY IMPORTANT FOR KIDS GRADE 1-3 IN ELEMENTARY SCHOOL

小学1-3年级参加的补习班和兴趣班

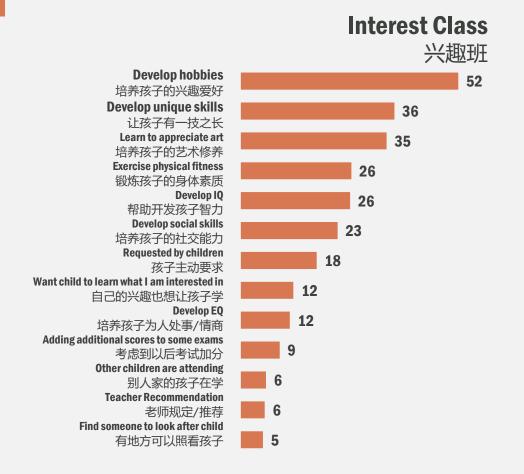


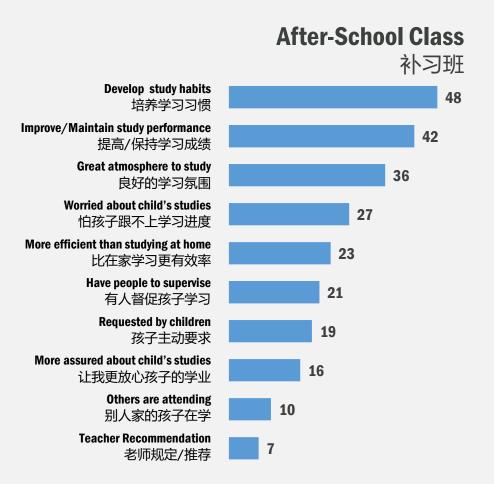
EARLY CHILDHOOD EDUCATION IS CRUCIAL, WHEN DEVELOPING GOOD HABITS AND ENGAGING IN HOBBIES TAKE PRIORITY

早期教育意义重大,习惯和兴趣培养是主要目的

REASONS FOR KIDS ATTENDING AFTER-SCHOOL/INTEREST CLASSES

小学1-3年级参加补习班/兴趣班的原因

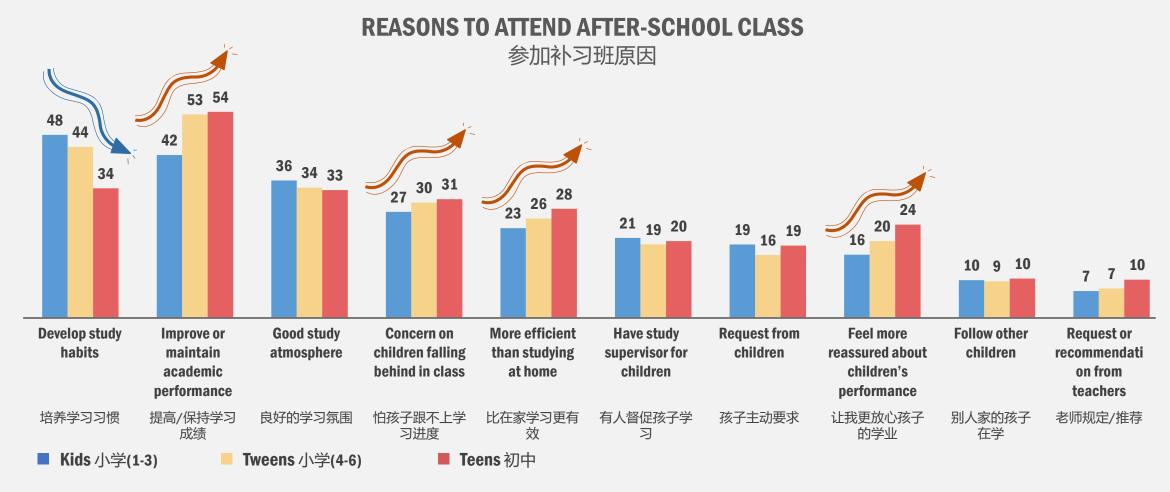






ACADEMIC PERFORMANCE BECOMES THE KEY FOCUS AS CHILDREN MOVE UP GRADES

随着受学业成绩导向的阶段来临,育儿重心逐渐转变为提高学习表现





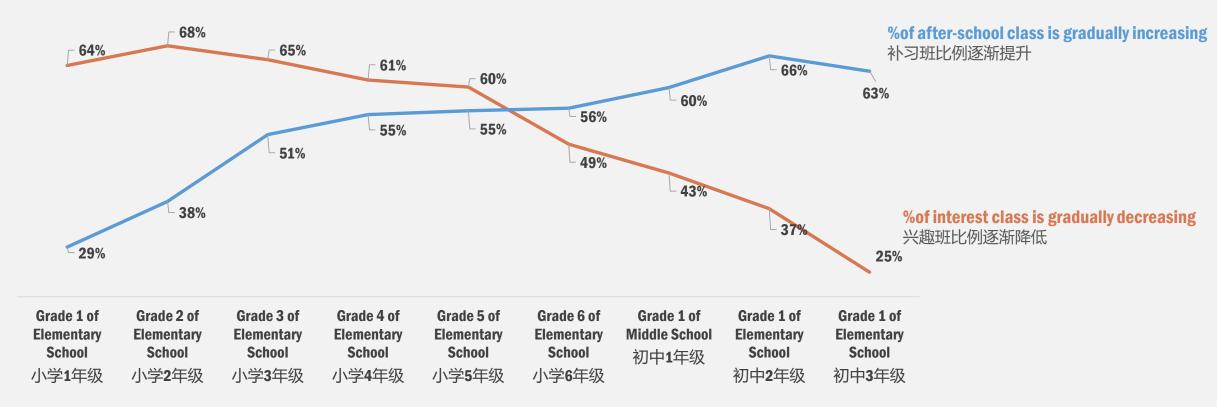
UNDER THE PRESSURE OF ENTERING HIGH SCHOOL ACADEMIC PERFORMANCE BECOMES

MORE AND MORE IMPORTANT

迫于升学压力需要进行权衡取舍,成为"硬件"的学习成绩被摆在了更重要的位置

THE ATTENDANCE OF AFTER-SCHOOL CLASS AND INTEREST CLASS

孩子参加补习班和兴趣班的比例

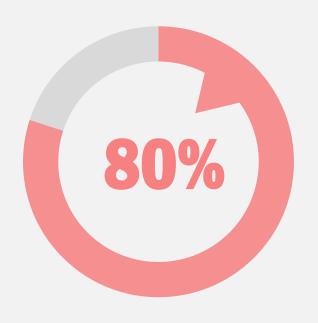




THE FOCUS ON SOFT SKILLS WEAKENS SLIGHTLY AS CHILDREN

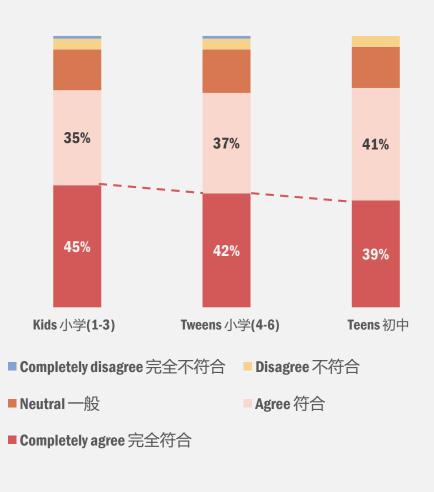
ENTER NEW GRADES

虽然认可"软件"和"硬件"同等重要,但随着学级的升高,在意识上有所减弱



BELIEVE EQ IS EQUALLY IMPORTANT TO ACADEMIC PERFORMANCE

认为情商培养与学习成绩同样重要



Top 1 box (completely agree)
gradually drops as the grades
progress

虽然整体态度认可,但"完 全符合"的数据有所下降





THIS HIGHLIGHTS THE CENTRAL CONFLICT; MOMS FACE A TRADE-OFF BETWEEN SOFT SKILLS AND ACADEMIC PERFORMANCE

这样就产生了冲突和矛盾点 寻求"软硬兼修",但要权衡取舍





HENCE, THEY SEIZE EVERY OPPORTUNITY TO ENABLE

"COMPREHENSIVE DEVELOPMENT"

既要补足"软件"的培养,同时追求全面教育,日常点滴都是宝贵的教养时刻

EDUTAINMENT ANYWHERE, ANYTIME

日常即教养,教养即日常



Parents choose to educate their children through daily activities and entertainments, letting their kids have fun and enjoy the learning process.

生活是个大学堂:对于泛八零后的父母而言,生活的方方面面是都可以是培养孩子的学校。越来越多的父母开始选择从日常生活和娱乐活动中寻找教育意义,让孩子从各方面都能学到新的东西。



My daughter is 8 years old now. I will ask her to cook together with me, to train her ability to live on her own in the future.

我女儿现在8岁,我有时会让她帮忙一起煮饭,可以锻炼她以后的自理能力。

Taking my son to supermarkets is also a good chance to develop his confidence and communication skills. He can go talk to the salesperson, consult on flavors.

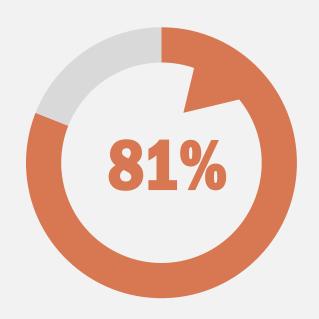
带儿子去超市也是很好的体验机会,他自己去跟工作人员交流试吃,或咨询口味,可以培养他的胆量。





SHOPPING HAS BECOME A GREAT WAY TO ENCOURAGE CHILDREN'S INDEPENDENCE

购物成为为培养孩子独立性和有主见的一种方式



I ENCOURAGE MY CHILD TO HAVE HIS/HER OWN OPINIONS AND MAKE MORE DECISIONS

希望孩子有自己的逐渐,并会鼓励他/她自己多做决定



I shop a lot offline because I can bring my kid with me. So he can have some shopping experience and learn through that. 我更多会在线下购物,因为线下可以带小朋友出去一起购物,让他有一些购物体验,来得到锻炼。

I let my kid pick his own daily commodities. Now he chooses what he wants to buy whenever we go to supermarket.

孩子的一些小的生活日用品,都会让他自己去选。现在他在超市都是自己来进行挑选的。







THEIR PARTICIPATION IN BUYING HELPS THEM PRACTICE DECISION MAKING

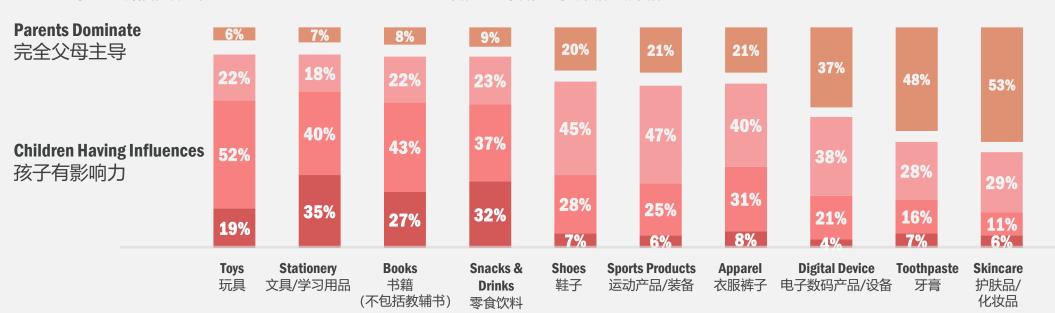
~尤其是在消费决策上,鼓励孩子参与购买决策,并适度介入进行把关

In most scenarios, children have decision or influence power

大部分情况孩子自己都可以影响购买决定

We just buy whatever we decided on 我们直接选,不会问孩子意见

- We choose the product and ask for their opinion 我们帮孩子选好,然后问孩子的意见
- They will select what they want to buy, and we will check 孩子选好会给我们看一下
- We don't care, they can buy whatever they want 我们完全不管,孩子想买什么就买什么







WATCHING MOVIES IS SEEN AS 'EDUTAINMENT', ESPECIALLY FOR KIDS AND TWEENS

看电影也可以是亲子与教育的方式,尤其是针对小学阶段而言

Watching movies is not only the top choice for a family moment, but also a great form of edutainment. Movie selections are also important as they will determine different educational benefits.

电影不仅仅是大多数家庭作为亲子/家庭时光的选择,同时也通过题材和内容的选择达到一定的教育意义。

WHICH RELATIVE TAKES CHILDREN TO THE CINEMA?

和孩子一起看电影







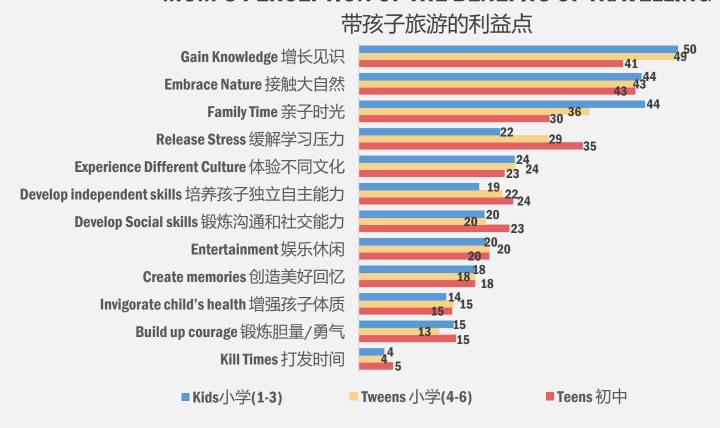
TRAVELLING IS ANOTHER OPPORTUNITY FOR 'EDUTAINMENT'

旅游更是寓教于乐的难得机会

Travelling does not only represent spending time with family, but also a good opportunity to train and educate children to broaden their vision while having a unique experience.

旅游不仅仅代表着亲子时光,更承载着多样化的意义。既是健康美好的家庭时光、又可以增长见闻和体验, 还能多方位对孩子进行锻炼和培养。

MOM'S PERCEPTION OF THE BENEFITS OF TRAVELLING





REWARDS AND PUNISHMENTS ARE USED EQUALLY BY PARENTS

即便是奖励与惩罚,也可以更具激励和教育意义

Most moms choose verbal praise and education as their top choice. Rewards that are considered edutainment such as travelling are also highly favored. Physical punishments are now less favored by moms. 积极的鼓励和时刻的提醒是多数母亲的选择。奖励时也更愿意选择可以如旅游等寓教于乐的方式。而体罚等惩罚措施 已不再是父母育儿的第一选择。

TOP ACTIONS TAKEN TO REWARD AND PUNISH

最常会使用的奖励及惩罚措施

26%

Traveling

带孩子旅游

2.6

Average no. of methods used to reward

平均会使用的奖励措施数量

Average no. of methods used to punish

平均会使用的惩罚措施数量





让孩子自己反思



控制手机/平板电脑使用





24%

Buy Snacks/Drinks

买零食/饮料











Punish 惩罚措施





PARENTS ENCOURAGE THE USAGE OF DIGITAL DEVICES

AS THEY SUPPORT THEIR CHILD'S DEVELOPMENT

电子设备帮助孩子接触多元信息。而本就数字化的泛八零后父母,对此态度非常积极

Most of the devices used by children are specifically bought for them by their parents.

大部分孩子的电子设备是家长专门为其购买









Smart Phone 智能手机

Child Phone 儿童手机

Tablet 平板电脑

Desk/Laptop 台式/笔记本电脑









Watch Phone 手表电话

E-Reader 电子阅读器

Learning Device Gaming Device 学习设备 游戏设备

MOMS THINK THEIR CHILDREN USE DIGITAL DEVICES FOR: 妈妈认为孩子使用电子设备的用途:



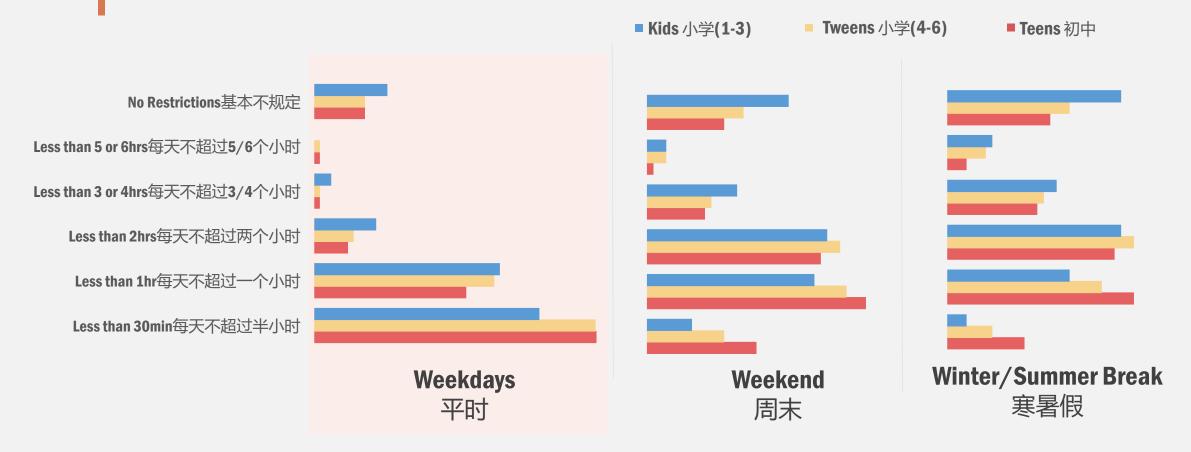


MANY PARENTS EMPLOY CONTROLS ON WEEKDAYS, FEWER DO SO ON WEEKENDS

~当然,数字设备的使用会在一定管辖范围内

Restrictions on device usage are more frequent during weekdays and less on weekends and breaks

对电子设备的监管更多是平时,在周末和假期则较为宽松







✓ HOWEVER, MOST PARENTS SUPERVISE THEIR CHILD'S DIGITAL DEVICE BEHAVIOR

_ 而使用行为也受一定的监管

How do moms monitor children's digital behaviors?

监督孩子使用电子设备的具体行为



However, nearly 30% of the moms claim that they do not monitor digital behaviors at all 有近3成的妈妈称其对此完全放任自由

MAINLY ON OVERALL BEHAVIORS

主要监督整体行为

69%	51 %	35%	32%
Check what games	Check what videos	Check what websites	Check what Apps
they are playing	they are watching	they are viewing	they are using
会看孩子玩什么游戏	会看孩子看什么视频	会看孩子看什么网站	会看孩子用什么APP

RARELY ON SOCIAL SPACE

社交空间较少干涉

22%	7%	4%
Check their conversation records 会看孩子的聊天记录	Check their online shopping site records 会看孩子在购物网站的记录	Check their Blogs/Zone 会看孩子的博客/空间







WITH POST-80S UNIQUE PARENTING STYLES, THEIR CHILDREN HAVE A WIDE RANGE OF INTERESTS AND EXPERIENCES

在泛八零后父母的育儿方式之下,他们体现出一定程度的早熟心智

EVEN THOUGH THEY ARE YOUNG IN AGE, THESE CHILDREN HAVE A WIDE RANGE OF INTERESTS

自幼就关注自己的方方面面

LANGUAGE 语言能力

VISION 眼界

CULTURE 文化

HOBBIES 兴趣爱好

EXPERIENCE 经历

APPEARANCE 颜值

SOCIAL 社交

STUDY 学习

TECHNOLOGY 科技

KNOWLEDGE 见识







THEY HAVE THEIR OWN DREAMS

-他们对未来有着一定的憧憬

Likely influenced by modern social/parents' expectations, boys tend to mention "specialist" jobs more. However despite girls largely mentioning "art" and "teaching" related jobs, many girls mentioned "specialist" jobs too. 也许是受现代舆论/父母期待影响,男生更偏向于提及专业类职业,而女生除了更倾向于选择艺术和教师外,对专业性职业也有了较多的提及。

35%

教练 Coach

律师 Lawyer 司机 Driver

飞行员 Air Pilot

科学家 Scientist

医生 Doctor

警察 **Police** 空姐 Cabin Crew 军人/解放军 Soldier

工程师Engineer

建筑师Architect 主持人 Host

Specialist

专业人员

(Male男: 46%, Female女: 24%)

19%

演员 Actor

舞蹈家 Dancer

设计师 Designer

画家 Painter

歌手 Singer

明星 Star

服装设计师 Dress Designer

Art

艺术类

(Male男: 10%, Female女: 28%)

16%

音乐老师 Music Teacher

舞蹈老师

Dance Instructor 老师 **Teacher**

美术老师Act Teacher

英语老师 English Teacher 体育老师 **PE Teacher**

Teacher

教师

(Male男: 7%, Female女: 24%)

3%

赛车手 Racer 篮球运动员

Basketball Player

运动员 Athlete

上球运动页 Football Player

Athlete

运动员

(Male男: 6%, Female女: 1%)

2%

企业家 Entrepreneur

老板 Boss

Entrepreneur

企业主或私营业主

(Male男: 3%, Female女: 1%)





OUTSIDE SCHOOL, THEY LIVE A FULL AND BUSY LIFE

他们拥有着丰富多彩的课余生活

WEEKLY OUTDOOR ACTIVITIES: 11 times

每周外出活动次数达到11次

2.2次

1.4次

1.4次

1.1次

CONVENIENT/GROCERY STORE 便利店/杂货店

STATIONERY SHOP 文具店 PARK 公园 LIBRARY 图书馆

1次

0.8次

0.7次

0.6次

SUPER/HYPERMARKET 超市大卖场 BOOK SHOP 书店 YOUTH ACTIVITY CENTRE 少年宫/青少年活动中心 MALL 商场

0.6次

0.4次

0.4次

0.3次

0.2次

SPORTS GROUND 体育场馆 AMUSEMENT PARK 游乐园

MUSEUM 博物馆/科技馆 ARCADE HALL 电玩城 THEATRE 音乐厅/剧院 TRAVEL TIMES PER YEAR: 3 times

每年旅游次数超过3次

2.3次

DOMESTIC (SHORT TRIP) 国内短途游

0.8次

DOMESTIC (LONG TRIP) 国内长途

0.3次

OVERSEA 出境游



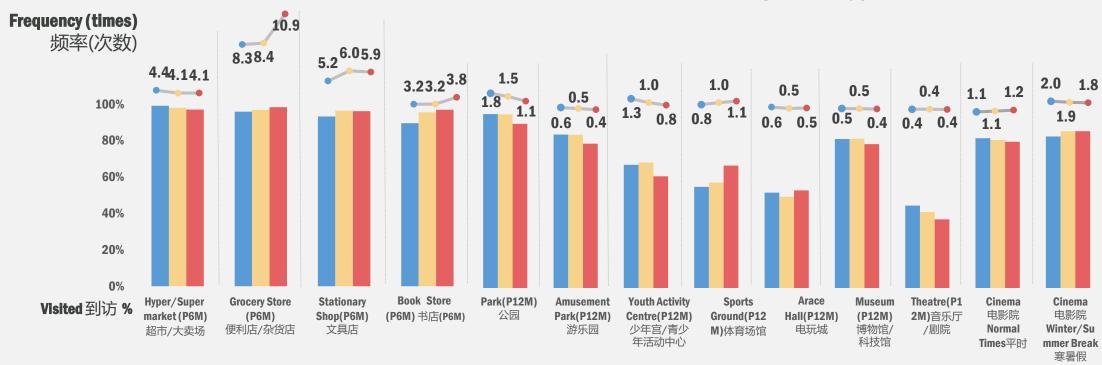


THEY SPEND MORE TIME OUT OF THE HOME AS THEY GROW UP

日常所接触的场所也随年龄的增长逐渐变多

■ Kids 小学(1-3) ■ Tweens 小学(4-6) ■ Teens 初中

Avg. visit times/per month 平均每月外出次数









✓ AS STUDENTS, THEY ARE CONSCIENTIOUS AND POSITIVE ABOUT STUDYING

身处学生时代,体现出对学习的积极态度,以及进取的精神

I AM POSITIVE AND HARDWORKING

对于学习,认为自己积极努力

72% I like studying 我非常/比较喜欢学习

76% I am working hard 我学习非常/比较努力

I AM PROACTIVE EVEN OUTSIDE SCHOOL

课余不忘主动拓展学习的疆域

"I like to attend a few after-school classes and learn stuff outside school"

"我喜欢去外面报的班,自己再额外学习一些 其他的东西。" HOWEVER, I AM NOT THAT HAPPY ABOUT MY SCORE 但对自己的成绩不够满意

64% I am satisfied about my score 对自己的成绩感到非常/比较满意

MOM THINKS I AM DOING WELL, BUT THERE IS STILL ROOM TO IMPROVE

而母亲也觉得孩子虽然表现较佳,仍有很多提升的空间 HOW DOES MOM FEEL ABOUT THEIR CHILD?

母亲觉得孩子怎么样?

Kids	Tweens	Teens
小学(1-3)	小学(4-6)	初中
8.4	8.4	8.4

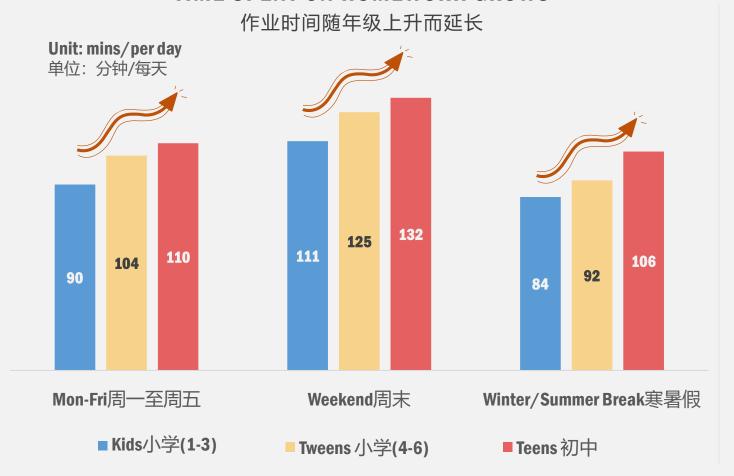




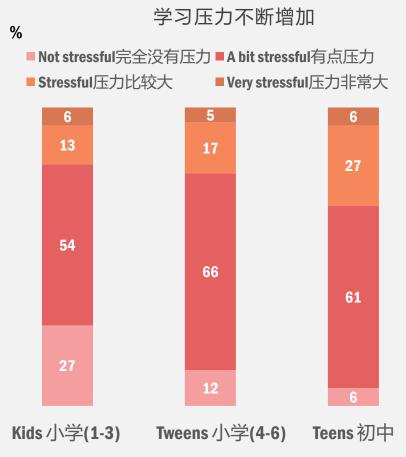
ALTHOUGH STUDYING REQUIRES MORE TIME AND IS STARTING TO CREATE STRESS

虽然学习上花费的时间和所面临的压力与日俱增

TIME SPENT ON HOMEWORK GROWS



PRESSURE GROWS OVER TIME





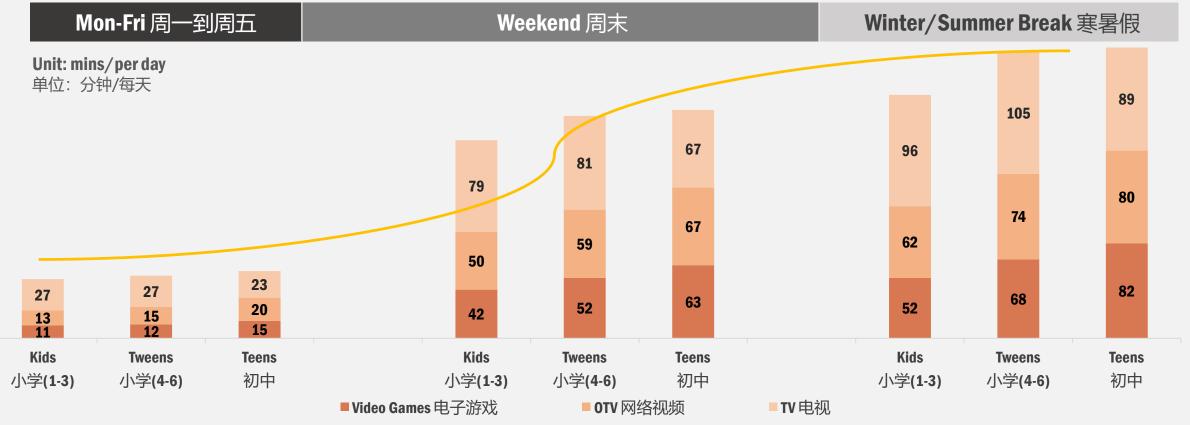
TIME SPENT ON ENTERTAINMENT GROWS PROPORTIONALLY TO STRESS LEVELS,

HIGHLIGHTING ITS ROLE AS A STRESS RELIEVER

但娱乐时间并无"缩水",反倒有所增加,体现出一定的张弛有度

TIME SPENT ON ENTERTAINMENT PER DAY

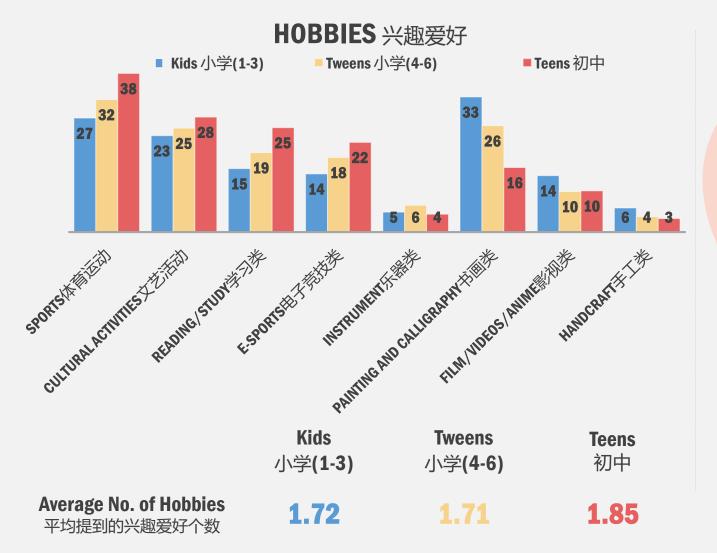
平均每日娱乐时间





HOBBIES REMAIN VERY IMPORTANT, ESPECIALLY FOR TEENS

兴趣爱好也并没有被抛弃



手工 Handcraft 美食 Eating 看视频 Watch Online Videos 游泳 Swimming 音乐 Music 弹琴 Piano 足球 Football 唱歌 Sing 跆拳道 Taekwondo 跳绳 Skipping 看电影 Watch Movie 溜冰 Ski 玩电子产品 Play Digital Devices 下棋 Chess 弹古筝 Chinese Zither 骑车 Ride 乒乓球 Ping-Pong 武术Martial Arts 写作 Writing 篮球 Basketball _{弹吉他 Guitar} 跑步 Running 书法 Calligraphy

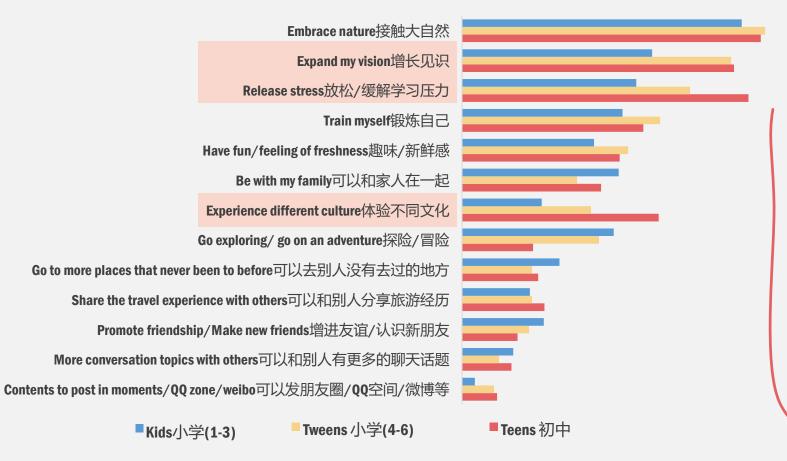


THEY LIKE TRAVELLING AND ARE ENGAGED BY THE BENEFITS IT BRINGS

他们喜欢旅游,能感知旅游的多方面价值

WHAT TRAVELLING BRINGS TO THEM

旅游对不同年龄段孩子的吸引点:



As they grow by age, children start to have a fuller understanding of travelling and the benefits it brings.

随年龄的增长对旅游的认识日趋完整, 且更倾向于知识文化层面





THEY ALSO FORM THEIR OWN OPINIONS ABOUT STUDYING ABROAD

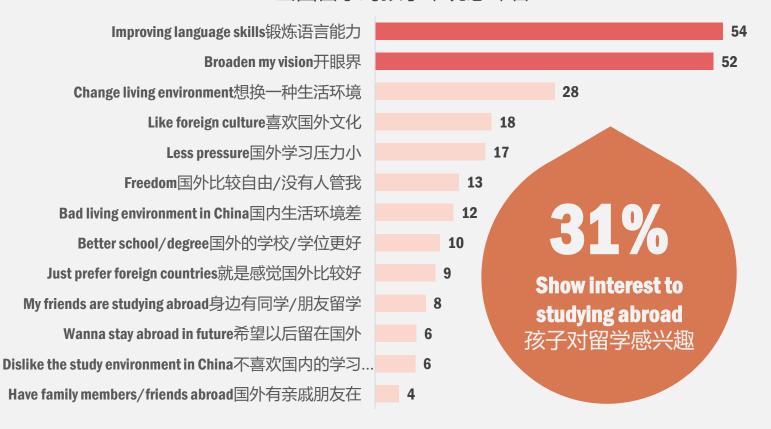
并已形成了对出国留学的成熟观点

Many children show interest in living overseas due to their unique education background, living environment and childhood experiences.

注重独立性的教育理念,相对开放的成长环境和丰富多彩的成长经历令许多孩子在初中甚至更小的阶段就对"外面的世界"充满了好奇。

STUDYING ABROAD MEANS...%

出国留学对孩子来说意味着...%





YOUNG AS THEY ARE, THESE CHILDREN START PAYING ATTENTION TO APPEARANCES

年幼的他们也已经开始注重外表颜值

Does not <u>disagree</u> with the statement 1 think external appearance is more important than inner ability' 不反对 "我觉得颜值比一个人的内在更重要"

I watch clothing, beauty and make-up videos on Weibo. I don't actively use these products now, but eventually I will.

——14 year old female

"我会在微博上关注一些美妆视频,如服装搭配, 化妆,美甲等。即使我现在不会做美甲,但是我长 大了就会做了。" — 一位14岁女生

I use my pocket money to buy things that are beautiful —— 12 year old female "我的零花钱用来买漂亮的东西。" - 一位12岁女生

I like ## brand, because many classmates like it and I think it is cool —— 9 year old male

"我喜欢##品牌,很多同学都喜欢,而且比较酷" - 一位9岁的男生





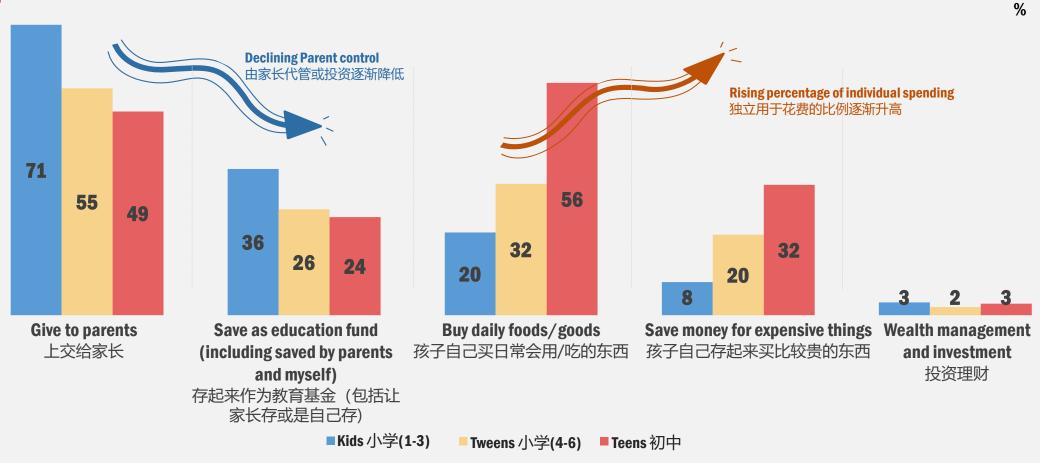


THEY GAIN MORE FINANCIAL POWER AS THEY GROW OLDER

-随着年龄的增长,对财务的掌控力逐渐提升

HOW CHILDREN SPEND THEIR MONEY

孩子对于金钱的用途







AND THEY START TO FORM THEIR OWN PERCEPTIONS ABOUT BUYING

并开始渐渐形成了自己的消费观念

I spend my money carefully, I only buy things that are worth buying 我不乱花钱,一般只买值得购买的东西

17% × 54%

I disagree that foreign products are better than domestic products 不认可国外的东西比中国的好

Children from Tier 1 cities have stronger opinions on their spending.

而一线城市的孩子的消费观略显成熟一些

T1 1线城市 57% T2 1线城市 **52**%

T1 1线城市 46% T2 1线城市 43%





THEY ALSO START TO ACCUMULATE "BRAND SMARTS"

也开始对不同的品牌建立认知



14.6

Average no. of snack brands aware

平均知道的零食品牌数量



11.8

Average no. of drink brands aware

平均知道的饮料品牌数量



5.9

Average no. of apparel brands aware

平均知道的服装品牌数量



8.1

Average no. of dairy brands aware

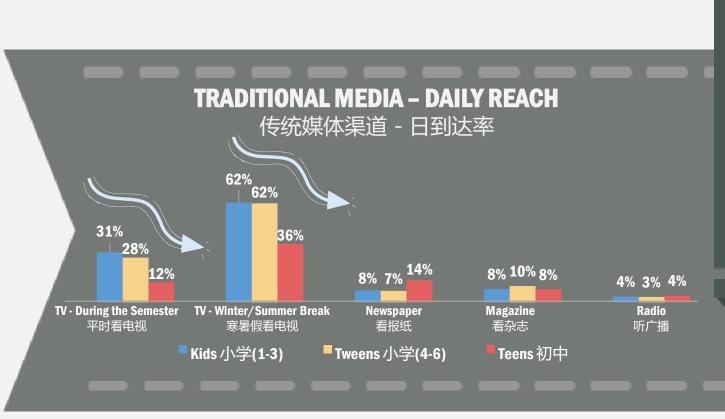
平均知道的乳制品品牌数量

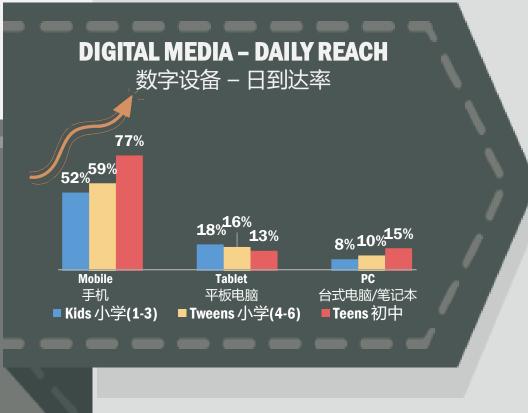




DIGITAL DEVICES/MEDIA GRADUALLY BECOME MORE INFLUENTIAL

数字设备/媒体的影响随学级逐渐升高









USAGE FREQUENCY INCREASES ACROSS ALL DIGITAL DEVICES

数字设备的使用粘度也呈逐高态势

TRADITIONAL MEDIA – FREQUENCY

传统媒体渠道 - 使用频率

Unit: Times/per week

单位:次数/每周

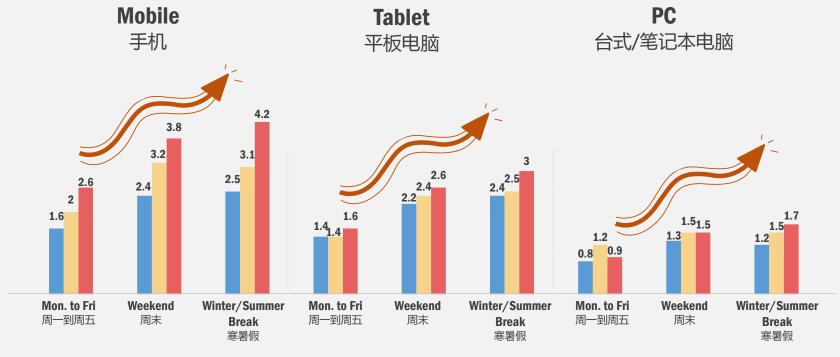


DIGITAL MEDIA – FREQUENCY

数字设备 - 使用频率

Unit: Times/per day

单位:次数/每天



■ Kids 小学(1-3) ■ Tweens 小学(4-6) ■ Teens 初中

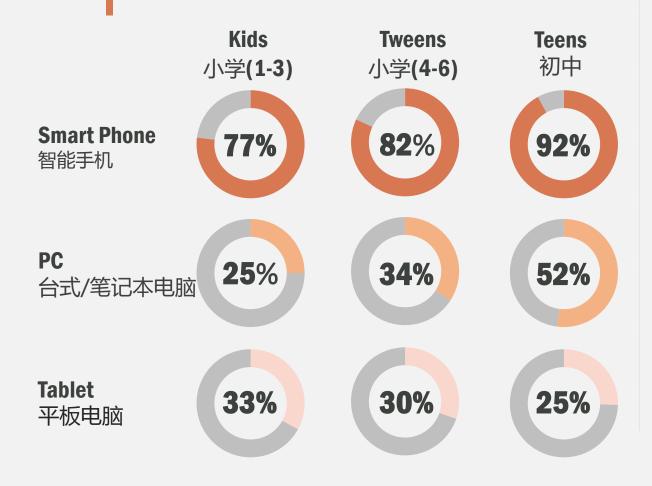


THEY ARE FULLY SURROUNDED BY DIGITAL DEVICES

他们是被电子设备全面包围的数字一代

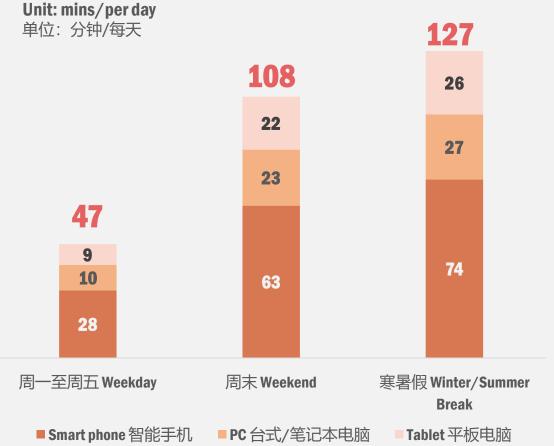
DIGITAL DEVICES PENETRATION

各类电子设备渗透率



AVERAGE DAILY TIME SPENT ON DIGITAL DEVICES

平均每日各类电子设备花费时间



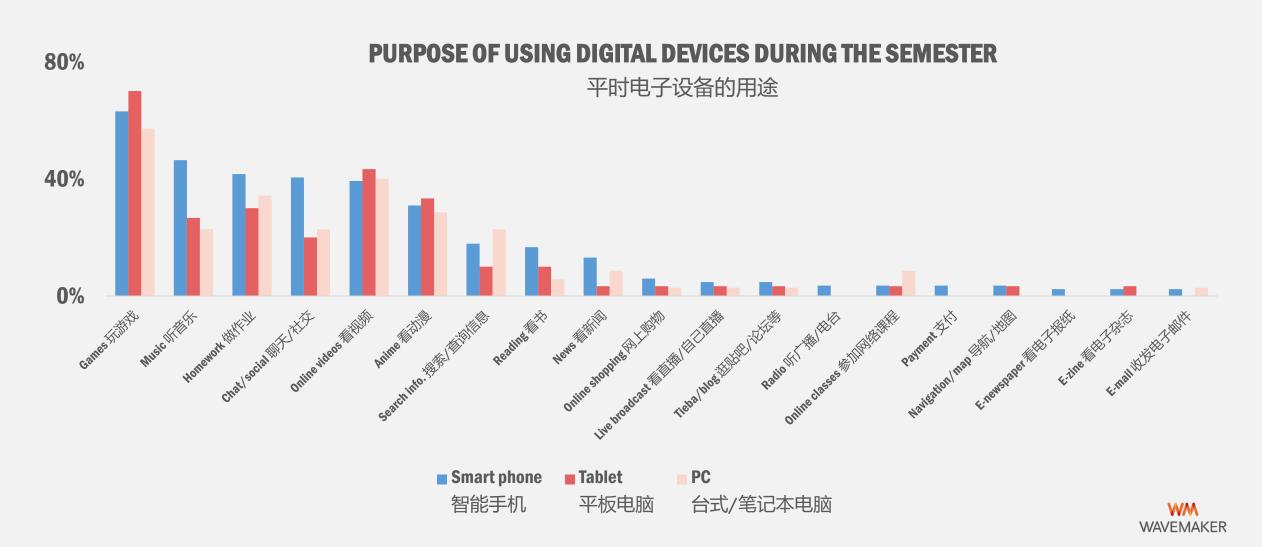
*NOTE: Time spent based on device users. 注: 花费时间是基于使用该设备的人



DIGITAL DEVICE USE PERMEATES EVERY ASPECT OF THEIR LIVES, ESPECIALLY

ENTERTAINMENT, EDUCATION AND SOCIAL

电子设备渗透在他们生活的方方面面,尤其是娱乐、学习、社交

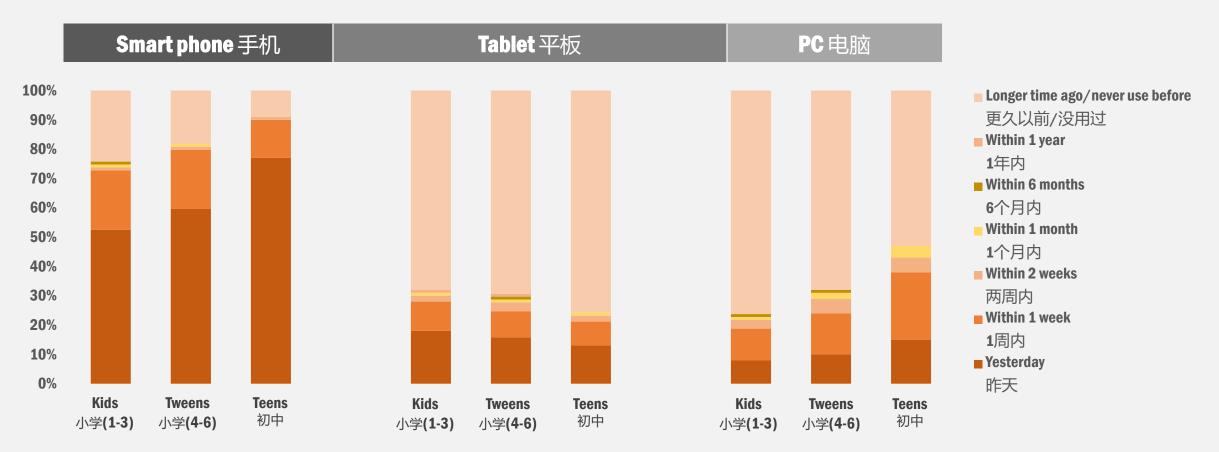


USAGE PENETRATION OF DIGITAL DEVICES INCREASES ALONG WITH AGING,

ESP. SMART PHONE

电子设备的活跃度整体较高,尤其是智能手机,随年纪逐渐提升

MOST RECENT USE OF DIGITAL DEVICES 最近一次使用数字设备的时间





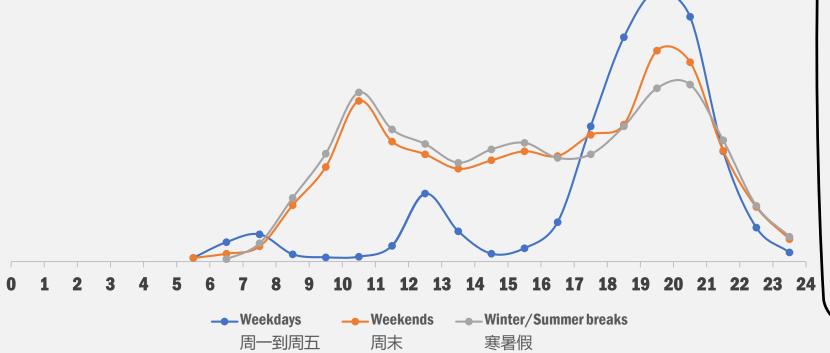


USAGE BEHAVIOR APPEARS IN EVERY MOMENT OF SPARE TIME

-电子设备的使用行为分布在课余的多个时间段

Smart phone is mainly used in the evening on weekdays, throughout the whole day at weekends and off-school

使用行为的时间分布和学习安排的关系较大,智能手机的使用时间平时以晚上为主,周末和假期则分布在全天



The general usage curve is similar across grades as students in China share similar school routines.

However, middle high school students spend more time on their smart phones than elementary school students.

不同年级学生的总体趋势无差别, 初中生的使用时间整体比小学1-3 总体要结束的晚一些。





THEY ARE VERY SOCIAL, ENJOYING CHECKING AND UPDATING THEIR STATUS

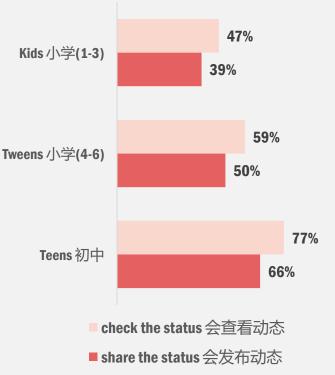
ON SOCIAL PLATFORMS

他们非常社交化,在社交平台上分享和关注是他们的日常

THE SOCIAL PLATFORM CURRENTLY USED CHECKING/SHARING INFO ON 目前使用的社交平台 SOCIAL PLATFORMS

	Kids 小学(1-3)	Tweens 小学(4-6)	Teens 初中
WeChat 微信	49%	68%	82%
QQ	27%	59 %	83%

SOCIAL PLATFORMS 使用社交平台查看和发布动态



USAGE FREQUENCY ON SOCIAL PLATFORM (TIMES / PER DAY)

使用社交平台频率(次/天)

	Kids 小学(1-3)	Tweens 小学(4-6)	Teens 初中
WeChat 微信	1.3	1.4	1.6
QQ	0.9	1.2	1.5

THE INFORMATION THAT THEY PAY ATTENTION TO OR SHARE ON SOCIAL PLATFORMS

在社交平台上,通常关注或发布的内容

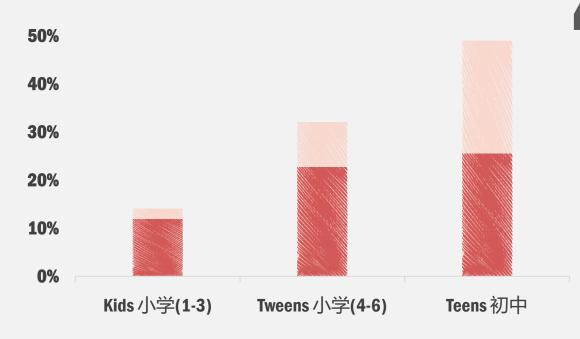




THEY ARE GROWING UP IN THE AGE OF ONLINE SHOPPING, CONVENIENCE HAS ALWAYS BEEN AVAILABLE TO THEM

他们生长于网购时代, 从小就享受到了网购的便利

With age, more and more children have their own online shopping account 随年龄增长更多孩子开始拥有自己的网购账号



Sometimes I ask my parents to transfer part of my pocket money via WeChat for online shopping.

我会要求父母把一部分零花钱用微信红包转给我用于网购

Online shopping is very convenient. I don't need to queue up to buy movie tickets, and there is a home delivery service for snacks that I want to buy.

网上购物比较方便,买电影票不用排队,买零食也会送货上门





[■] Do online shopping会使用网购

[■] Use parents' account to do online shopping会使用父母网购账号



AND THEY ARE GETTING USED TO WATCHING ONLINE VIDEOS FOR ENTERTAINMENT 而网络视频正在成为他们惯用的娱乐方式



HAVE OWN ONLINE VIDEO ACCOUNT

有自己网络视频账号

Kids	Tweens	Teens
小学(1-3)	小学(4-6)	初中
8%	17 %	25%

TIME SPENT WATCHING ONLINE VIDEO

网络视频观看时间

Unit: mins/per day 单位:分钟/每天



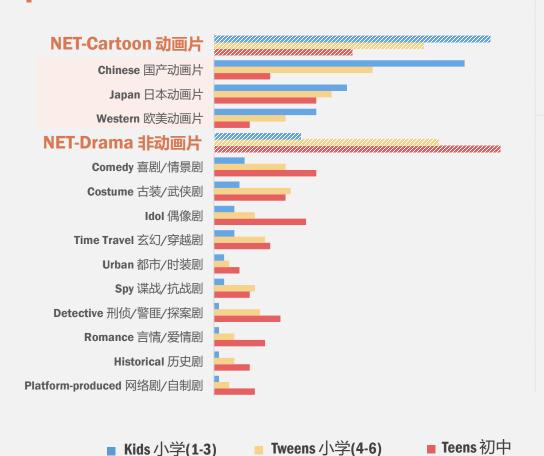


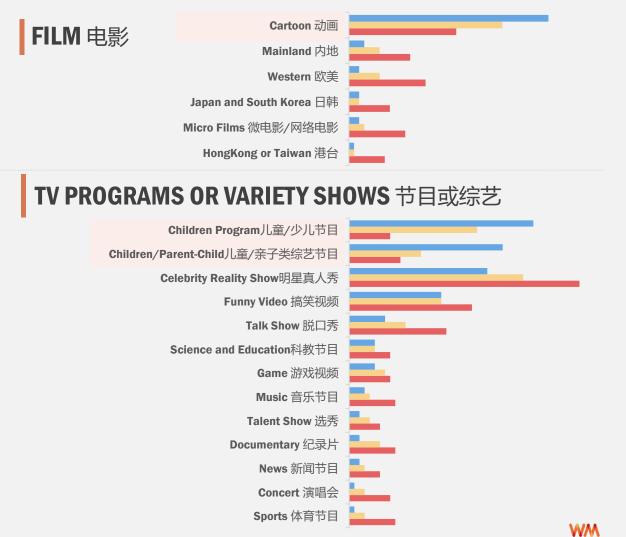


THE CONTENT THEY WATCH BECOMES MORE SOPHISTICATED AS THEY GET OLDER

孩子的观看的网络视频内容随年龄迅速成熟化

TV SERIES 电视剧



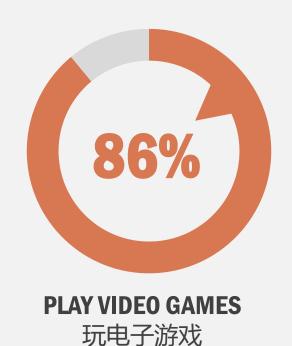


WAVEMAKER



VIDEO GAMES ARE BECOMING THE 1ST CHOICE FOR THEIR ENTERTAINMENT

电子游戏也在逐渐成为娱乐首选

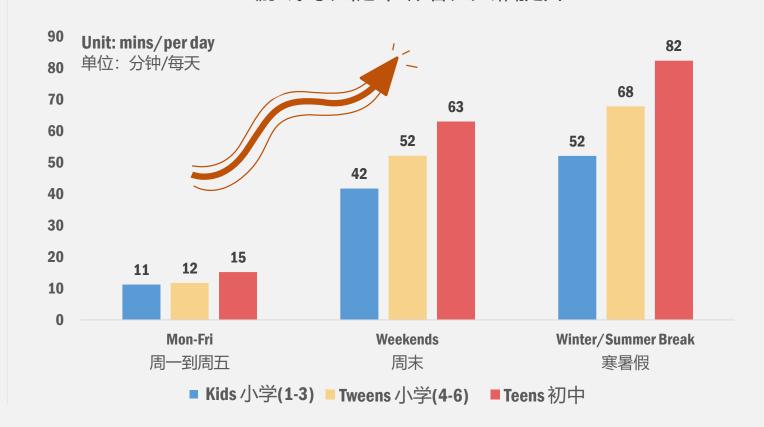


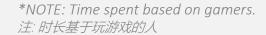
 Kids
 Tweens
 Teens

 小学(1-3)
 小学(4-6)
 初中

 85%
 88%
 89%

TIME SPENT ON VIDEO GAMES ARE INCREASING BY AGE 游戏时长随年龄增长大幅提升









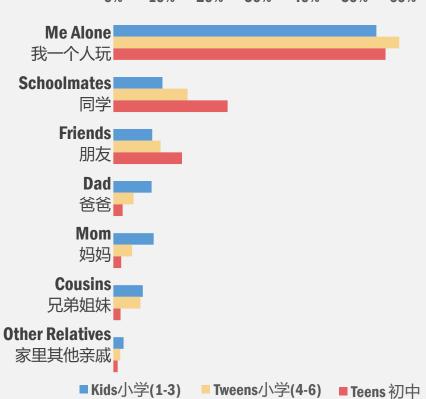
AS THE ONLY CHILD IN THE FAMILY, VIDEO GAMES ARE ENTERTAINMENT JUST FOR THEM

·大多为独生子女的他们,多数情况下,网络游戏是属于一个人的小世界

USUALLY PLAY VIDEO GAMES WITH:

平时孩子和谁一起玩游戏-所有孩子

10% 10% 20% 30% 40% 50% 60% 70%



CHILDREN PLAY VIDEO GAMES MORE FREQUENTLY THAN THEIR PARENTS REALISE

孩童们玩游戏的频率大于妈妈的感知

Unit: Times/per day 单位:平均次数/每天

		Kids 小学(1-3)	Tweens 小学(4-6)	Teens 初中
Mon-Fri	MOM妈妈	0.3	0.4	0.4
周一到周五	Child孩子	/	0.6	0.5
Weekend	МОМ如马妇	1.2	1.4	1.5
周末	Child孩子	/	1.9	1.6
Winter/Summer Break 寒暑假	MOM妈妈	1.4	1.6	1.8
	Child孩子	/	2.4	2.1

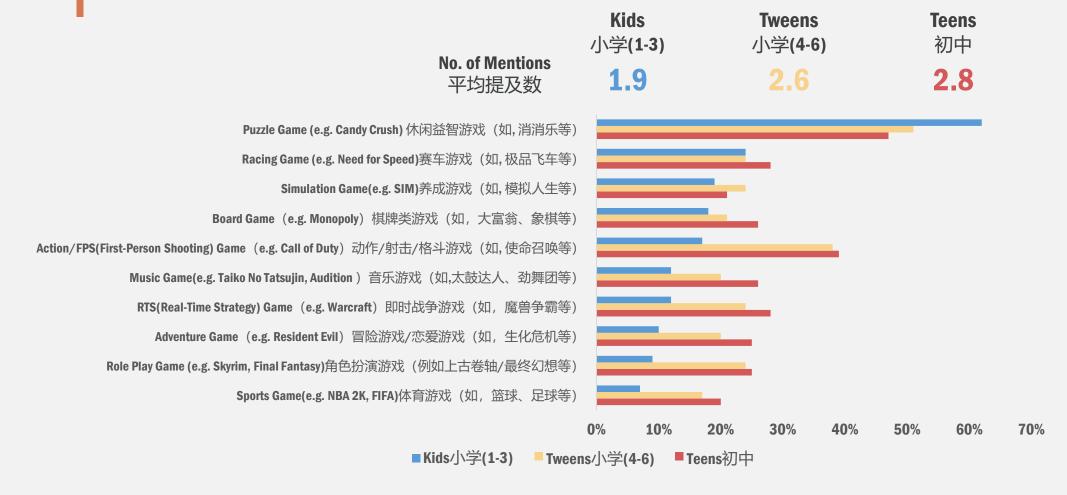
^{*}NOTE: based on gamers. 注: 基于玩游戏的人

WITH AGE, THE TYPES OF VIDEO GAMES THEY PLAY BECOME MORE DIVERSE

随年龄增长,对游戏类型的涉猎也变得更多元化

TYPES OF VIDEO GAMES THEY USUALLY PLAY

通常玩的游戏类型





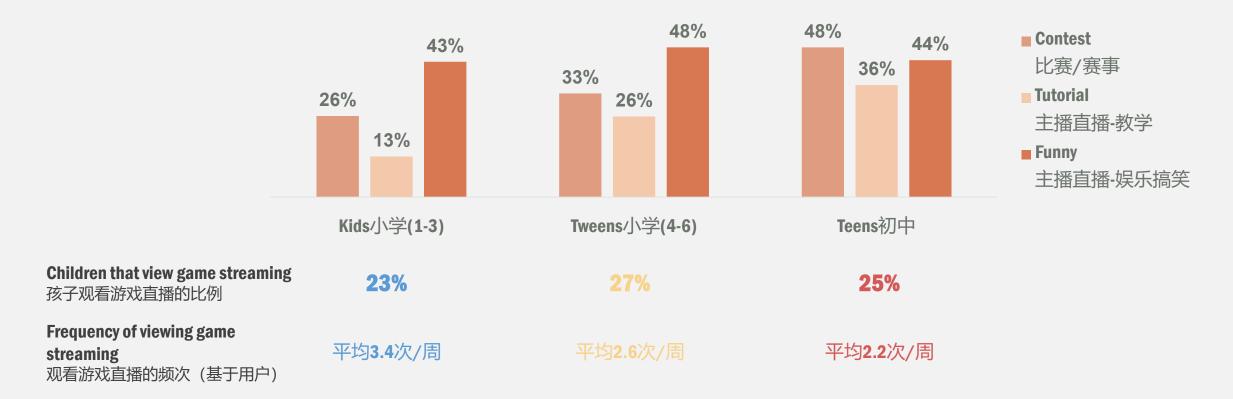


FREQUENCY OF GAME STREAMING DECLINES WITH AGE BUT CONTENT TYPE DIVERSIFIES

网络游戏直播开始萌芽

TYPE OF STREAMING BECOMES MORE DIVERSE

观看直播类型也逐步多样化









RISING BRAND CONSCIOUSNESS COMES WITH CONTROL OVER THEIR OWN SPENDING

·随着消费力和决策力的提升,以及消费观的形成,逐渐崛起品牌意识

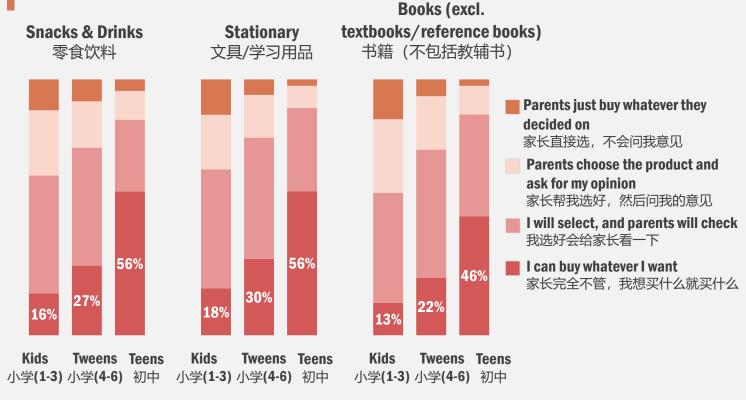
AVG. ANNUAL INCOME (RMB)

平均年度收入(元)

	Kids 小学(1-3)	Tweens 小学(4-6)	Teens 初中
Pocket Money 零花钱	956	1,232	2,534
Lucky Money 压岁钱	3,727	3,233	3,383

CHILDREN'S DECISION-MAKING POWER (SELECTED CATEGORIES)

孩子的购买决策力



^{*}NOTE: decision making power based on all those who purchased selected categories to their child(ren) 注: 基于购买过该品类的人

WM WAVEMAKER

^{*}Pocket Money=monthly Pocket Money*12 平均一年收入(元)=每月零花钱×12个月

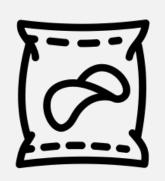


THEY ARE GETTING TO KNOW MORE ABOUT BRANDS, ESPECIALLY IN

CATEGORIES THEY REGULARLY CONSUME 孩童群体在不同品类开始逐渐积累品牌认知,尤其是日常消费的品类

In this study, we broadly explore selected child-related categories

本次研究中, 我们简要探索了和孩童相关度较高的品类



SNACKS 零食



DRINKS 饮料



DAIRY PRODUCTS 乳制品



APPAREL 服装



TOYS 玩具





AMONG ALL THESE CATEGORIES, CHILDREN ARE MOST FAMILIAR WITH SNACKS

零食是孩子认知品牌数量最多的品类

They are aware of many brands from a young age 从小开始就知晓较多的品牌

14.6

Avg. number of brands that children are aware of

孩子平均知道的品牌数量

12.1	14.9	16.9
Kids	Tweens	Teens
小学(1-3)	小学(4-6)	初中

SNACK BRANDS THAT CHILDREN EAT MOST OFTEN

孩子最常吃的零食品牌

雀巢 Nestle

百奇 Pocky

好丽友 Orion

阿尔卑斯 AlpenI iebe

妙脆角 Bugles

上好佳 Oishi

薯愿 Ye Gam

达利园 Dali

闲趣 Tue

康师傅 Master Kong 好多鱼 Goraebab

趣多多 Chips Ahoy

百吉福 Mailkana

喜之郎 Strong 波力 Poli

日王日王 Want- Want

呀! 土豆 Oh! Gamja

德芙 Dove

奥利奥 Orio

士力架 Snickers

好时 Hershey's 太平 Pacific

乐事 Lays

可比克 Copico





SOFT DRINKS ARE THE 2ND MOST FAMILIAR CATEGORY

饮料也是孩子较为熟悉的品类

They are also aware of many drinks brands 对饮料品牌的知晓度不亚于零食品牌

11.8

Avg. No. of brands that children are aware of 孩子平均知道的品牌数量

9.6	12.2	13.8
Kids	Tweens	Teens
小学(1-3)	小学(4-6)	初中

DRINKS BRANDS CONSUMED MOST OFTEN

孩子最常喝的饮料品牌

海之言 Haizhiyan 维他柠檬茶 Vita

加多宝JDB

尖叫 Scream

脉动 Mizone

美年达 Mirinda

汇源 Huiyuan

小茗同学 Classmate Xiaoming

味全每日 C DailyC

美汁源 Minute Maid

可口可乐 Coca-Cola

康师傅 Master Kong

统一 President

百事可乐 Pepsi-Cola

雪碧 Sprite

娃哈哈 Wahaha _{芬达 Fanta}





THEY ARE ALSO HIGHLY AWARE OF THE DIARY CATEGORY

-乳制品的品牌认知数量紧随其后 – 他们对乳制品品类也有着高关注度度

8.1

Avg. No. of brands that children are aware of 孩子平均知道的品牌数量

6.5	8.1	9.7
Kids	Tweens	Teens
小学(1-3)	小学(4-6)	初中

DAIRY BRANDS CONSUMED MOST OFTEN

孩子最常食用的乳制品品牌

君乐宝 Junlebao

旺仔 Hot Kid

味全 WeiChuan

蒙牛 Mengniu 桂格 Quaker

维他奶 Vita

新希望 New Hope 椰树 Yeshu

六个核桃 Six Walnuts

光明 Bright

娃哈哈 Wahaha

银鹭 Yinlu

明治 Meiji

养乐多 Yakult

伊利 Yil

安佳 Anchor

百吉福 Milkana

三元 Sanyuan

达能 Danone





TEENS ARE AWARE OF ALMOST TWICE AS MANY APPAREL BRANDS

~对时尚服饰上的认知也已经开始萌芽 – 了解时尚服饰对他们来说也十分重要

5.9

Avg. number of brands that children are aware of

孩子平均知道的品牌数量

4.3	5.3	7.9
Kids	Tweens	Teens
小学(1-3)	小学(4-6)	初中

TOP 10 AWARE BRANDS

认知度前十名的品牌

Paul Frank 大嘴猴	49%
Adidas 阿迪达斯	39%
Nike 耐克	39%
361°361 度	34%
Disney 迪士尼	29%
Anta 安踏	26%
LiNing 李宁	25%
Balabala 巴拉巴拉	22%
New Balance 新百伦	20%
UNIQLO 优衣库	19%



TOY CATEGORY IS LESS RECOGNIZED BY CHILDREN

·孩子认知的玩具品牌相对较为集中,因此总体认知数量相对不如其他品类,尤其在年龄上升后 游戏选择更多向电子设备端倾斜

3

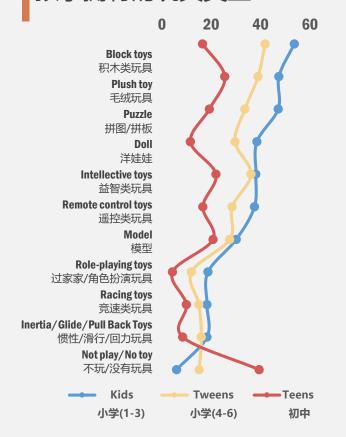
Avg. number of brands that children are aware of

孩子平均知道的品牌数量

2.8	3.2	3.1
Kids	Tweens	Teens
小学(1-3)	小学(4-6)	初中

TOYS OWNED

孩子拥有的玩具类型



TOY BRANDS BOUGHT MOST OFTEN

孩子最常购买的玩具品牌

小鲁班 Sluban

万代 Bandai

启蒙 Enlighten

乐高 Lego

星钻 Star Diamond

芭比 Barbie

奥迪双钻 Auldey

孩之宝 Hasbro









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