

THE X FACTOR

中国X世代影响力

为什么不能忽视X世代

Why you can't afford to forget Gen X

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Introduction

为什么选择X世代? 为什么是现在?

Why Gen X? Why now?

谁是X世代?

Who is Gen X ?

14亿

1.4 billion

X世代群体目前活跃于世界各地
Currently navigating the globe

出生1965年至1980年
Born between 1965
and 1980

当前年龄在45至60岁之间
Currently aged 45–60



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谁是X世代? Who is Gen X?

X世代以独立精神为傲

Gen Xers pride independence —
raised as **latchkey kids** by
working parents

**青年时期见证了MTV、摇滚文化和
个人电脑的兴起**

Youth witnessed the rise of **MTV**,
grunge culture, and **personal
computing**



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X世代现在拥有的消费实力...

Gen Xers have the spending power now ...

仅在2025年,
In 2025 alone,
X世代的全球消费预计将达
Gen X will spend an estimated

\$15.2

万亿美元
(USD) trillion globally

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Source: World Data Lab



...并且在可预见的未来
... *and* for the foreseeable future

到2033年，
X世代的全球人均支出将位居首位，超过
Gen X will be the **per-capita spending leader**
globally through 2033, surpassing



万亿美元
(USD) trillion globally

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Source: World Data Lab

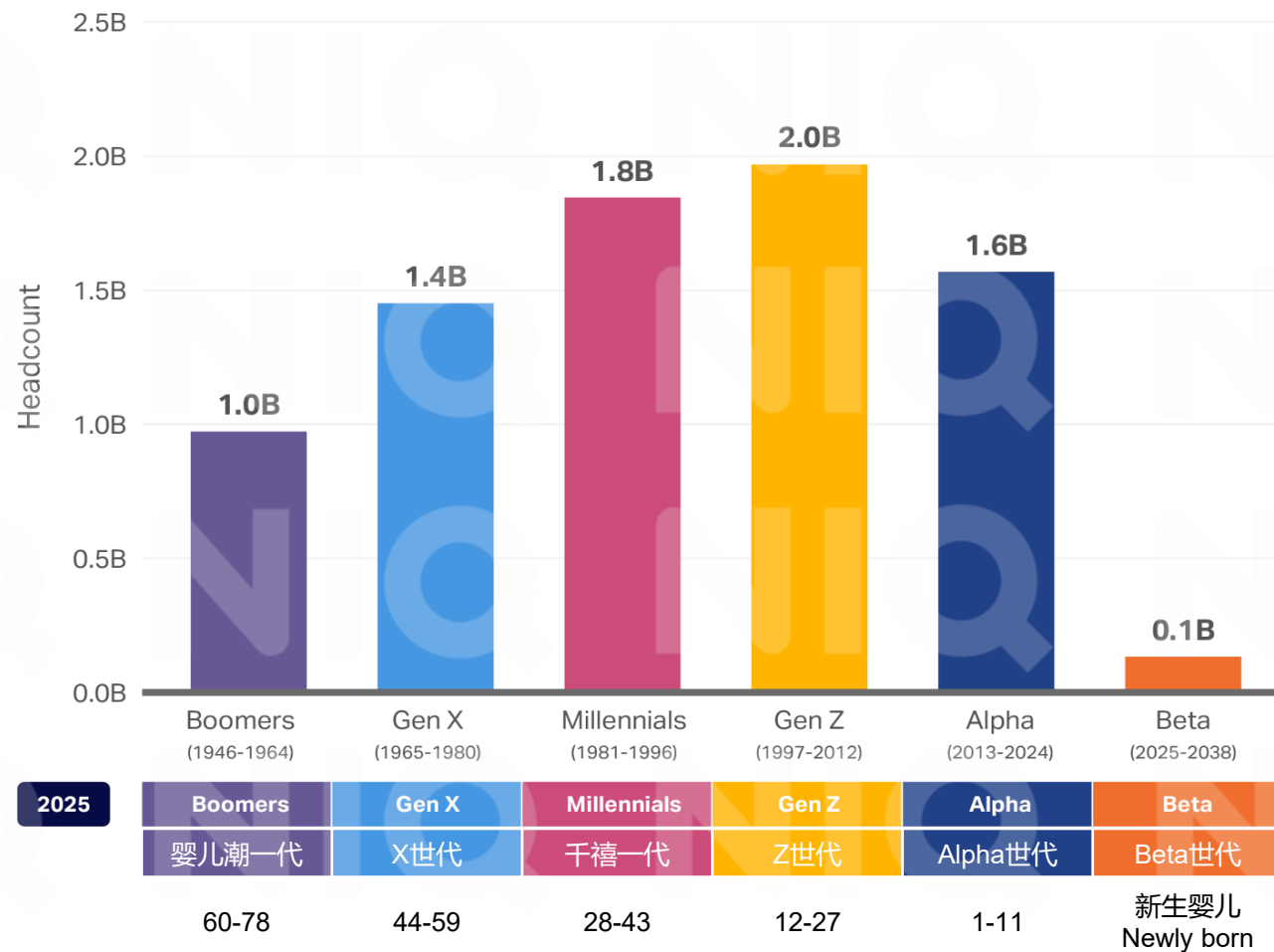


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2025年，X世代占全球人口的17%...

In 2025, Gen X makes up 17% of the global population ...

按世代划分的人口 (2025) Population by generation (2025)



Source: World Data Lab

NielsenIQ

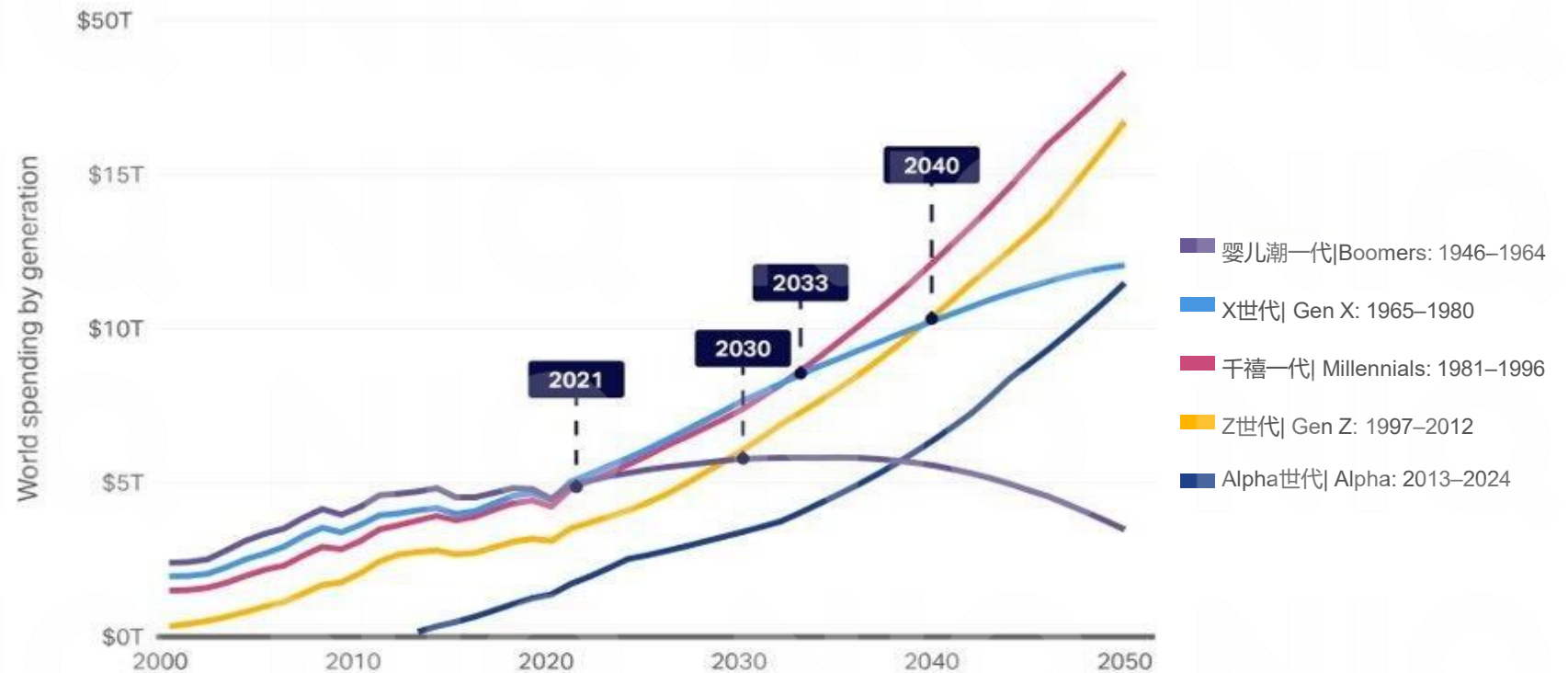
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...但X世代占据
全球四分之一
消费能力

... but Gen
Xers account
for *one-*
quarter of the
world's
spending
power.

X世代自2021年起主导全球消费支出，并将持续至2033年
Gen X has led global consumer spending since 2021,
and will continue to do so until 2033



Source: World Data Lab

Nominal USD

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Today, Gen X dominates in China and most of Europe

Most dominant generation per country by consumer spending (2025)

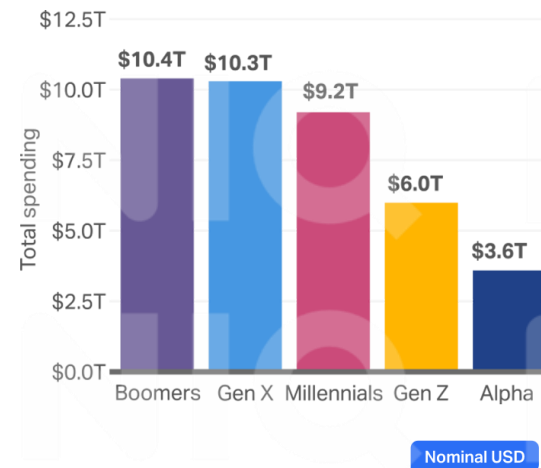
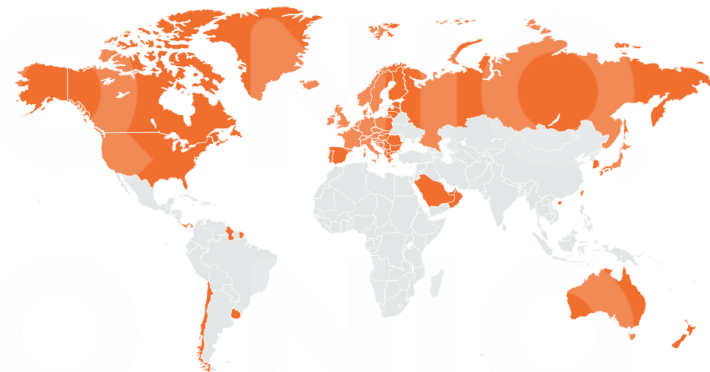


代际消费： 两个世界的故事 (2025)

Generational spending: A tale of two worlds (2025)

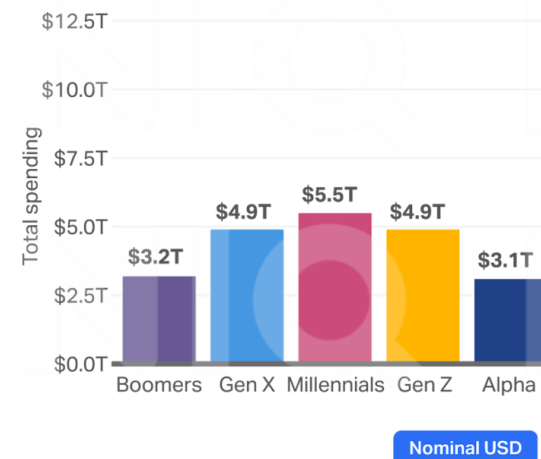
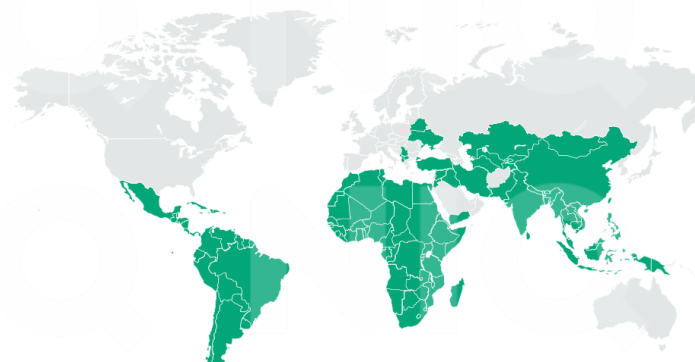
高收入国家

High-income countries



中低收入国家

Low- and middle-income countries



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驱动X世代消费的核心因素

**What drives Gen X
consumption?**



X世代
Gen X

三明治一代
The sandwich generation

三明治一代 The sandwich generation

X世代增长最快的消费品类：2025–2030

Fastest-growing categories for Gen X: 2025–2030

X世代 “照料型消费者” 的定位体现在照顾父母和养育孩子两面

Gen Xers’ spend on Elder & Dependent Care and Education have clearly positioned them as “*caretaker consumers*.”

		2025年X世代 市场规模 Size of Gen X market in 2025	X世代复合 年均增长率 2025-2030年 Gen X CAGR: 2025-2030
年长者及被抚养人照护	Elder & Dependent Care	\$82B	8.2%
户外休闲耐用设备	Outdoor Recreation Durables*	\$60B	6.8%
教育支出	Education	\$352B	6.2%
家用工具	Household Tools**	\$30B	6.2%

Nominal USD

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*包括飞机、船只、皮划艇、独木舟、热气球、马匹、风帆冲浪设备、高尔夫球车、潜水设备等。

**包括手动工具、园艺工具、梯子、门配件、小型电子配件等。

*Includes planes, boats, kayaks, canoes, hot air balloons, horses, windsurfing, golf carts, scuba equipment, etc.

**Includes hand tools, gardening tools, ladders, door fittings, small electronic accessories

三明治一代 The sandwich generation

作为三代人“财务管家”，X世代的大部分财富都是有计划性地花给他人，也有偶尔一时兴起
As the “CFO” of 3 generations, much of Gen X’s wealth is spent on others as planned, sometimes on a whim

11%

我可以自由支配开支
I am able to spend freely

44%

我生活舒适，可以因一时兴起购物
I live comfortably and am able to buy things just because I want them



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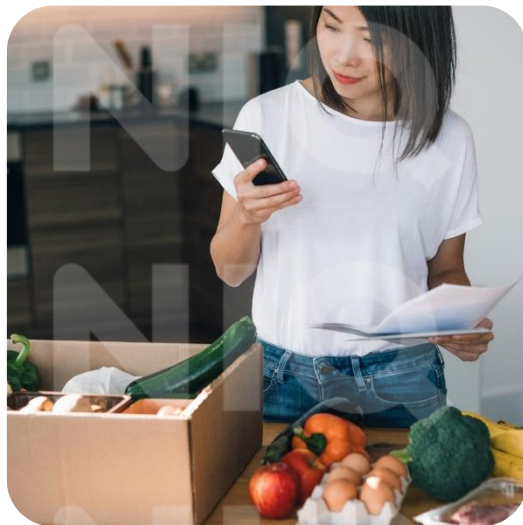
X世代：开拓者、影响者与务实者 Gen X: Pioneers, influencers, and pragmatists

值得注意的消费者行为 Noteworthy consumer behaviors



数字先锋 *Digital pioneers*

- 信任评论 Trusts reviews
- 首批全渠道购物者
First omnichannel shoppers
- 在电子邮件等渠道中获取品牌信任
Earned branded trust in channels like email



科技影响者 *Tech influencers*

- 通常主导家庭科技产品的采购决策
Often set the household tech agenda



务实买家 *Pragmatic buyers*

- 注重品质与清晰，非“华而不实”
Want quality and clarity over “flash”
- 品牌忠诚度高
Highly brand loyalty

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X世代：多维度的成熟消费者 Gen X: Multi-dimensional, mature consumers

他们常常为现代生活方式和消费模式树立标杆

They often set the standard for what modern lifestyle and consumption looks like



有房一族

Home ownership



教育为中心的育儿方式

Educational parenting



品牌追求

Brand aspiration



正式就业

Formal employment

X世代往往**信任品牌**，并且对有助于**提升社会地位**的消费表现出较高的**品牌忠诚度**

Gen X tends to be **brand-trusting** and **loyal** to **status-building** purchases

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哪些品类最有望赢得X世代的青睐？

**So, which categories are best
positioned to win with Gen X?**

最有望赢得X世代青睐的品类

Categories best positioned to win with Gen X

X世代或许在总资产层面并非最富有的世代，但他们**主导日常可支配开支**，并在多品类消费中展现出**最高的投资回报率**——尤其体现在右侧三大主要品类上...

Gen X may not be the wealthiest generation (in terms of total assets), but they **dominate in daily discretionary spending** and represent the **greatest consumer ROI** in multi category purchases—especially across three major categories ...



食品与非酒精饮料
Food &
Non-alcoholic
Beverages



酒类
Alcohol



美业
Beauty

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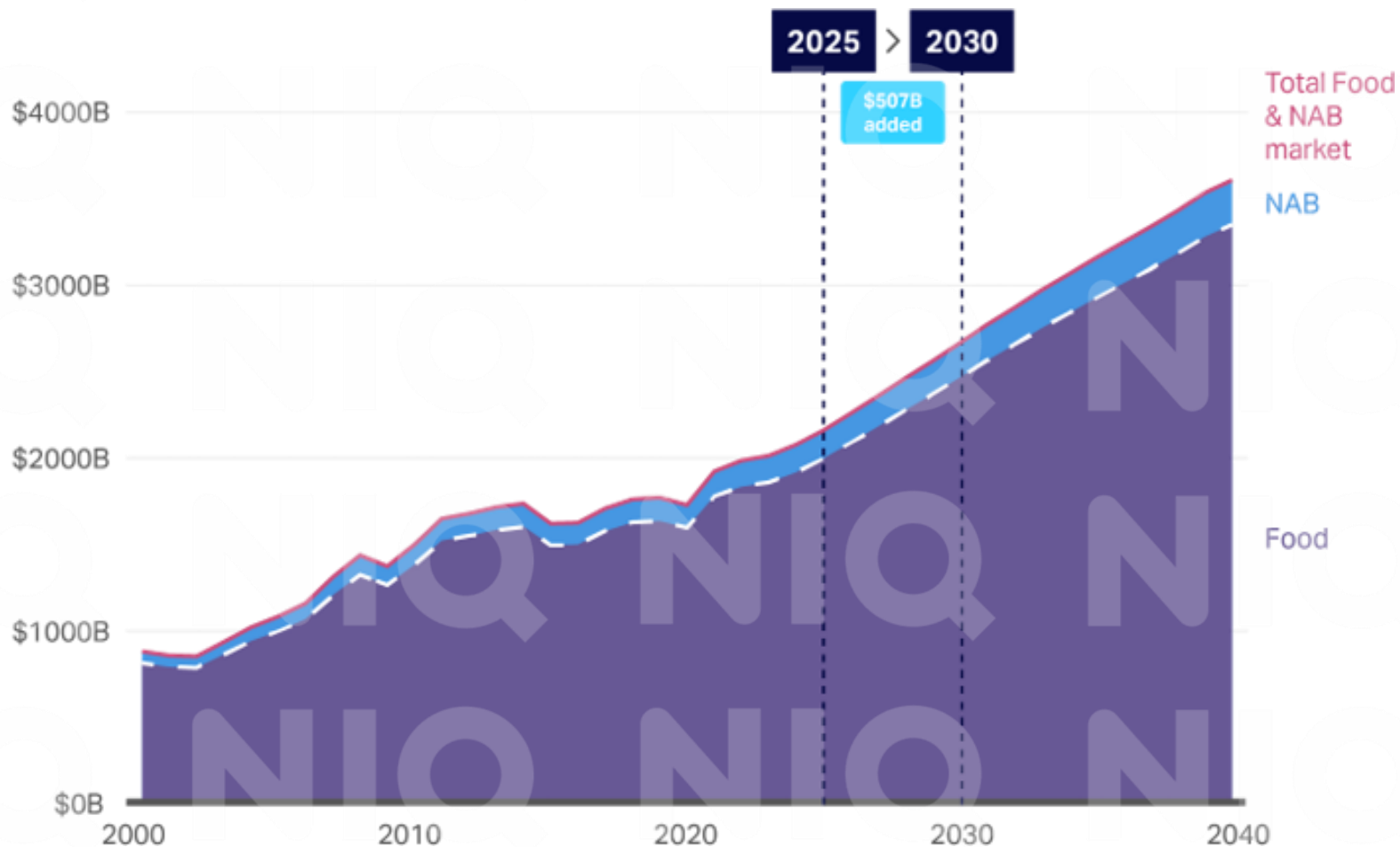
A woman with dark hair tied back, wearing a red long-sleeved top and a black watch, is standing in a grocery store aisle. She is looking at a shelf of products, holding a small white object in her right hand. The background is blurred, showing other aisles and store lighting.

食品与非酒精饮料

Food & Non-alcoholic Beverages

未来五年，X世代的食物与非酒精饮料市场规模将增长至目前的1.2倍。

The Gen X Food & NAB market will grow to 1.2x its current size in the next five years.



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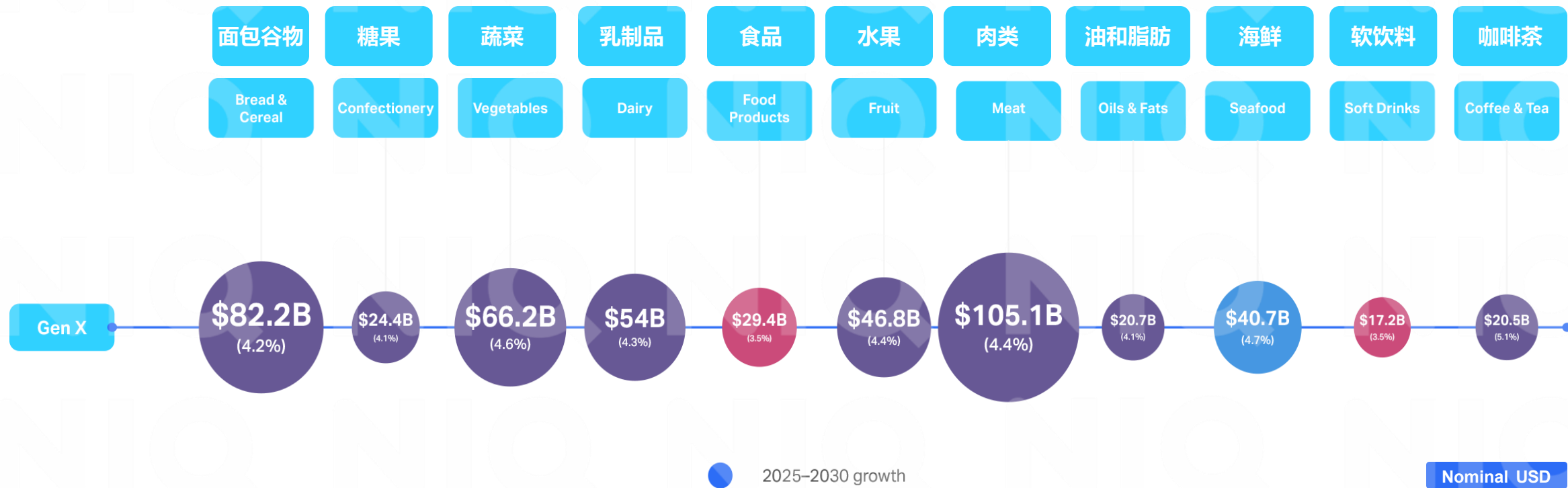
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Nominal USD

全球X世代食品与非酒精饮料品类支出增长

Gen X Food & NAB categories spending growth, global

品类增长及复合年均增长率：2025–2030年
Categories growth and CAGR: 2025–2030



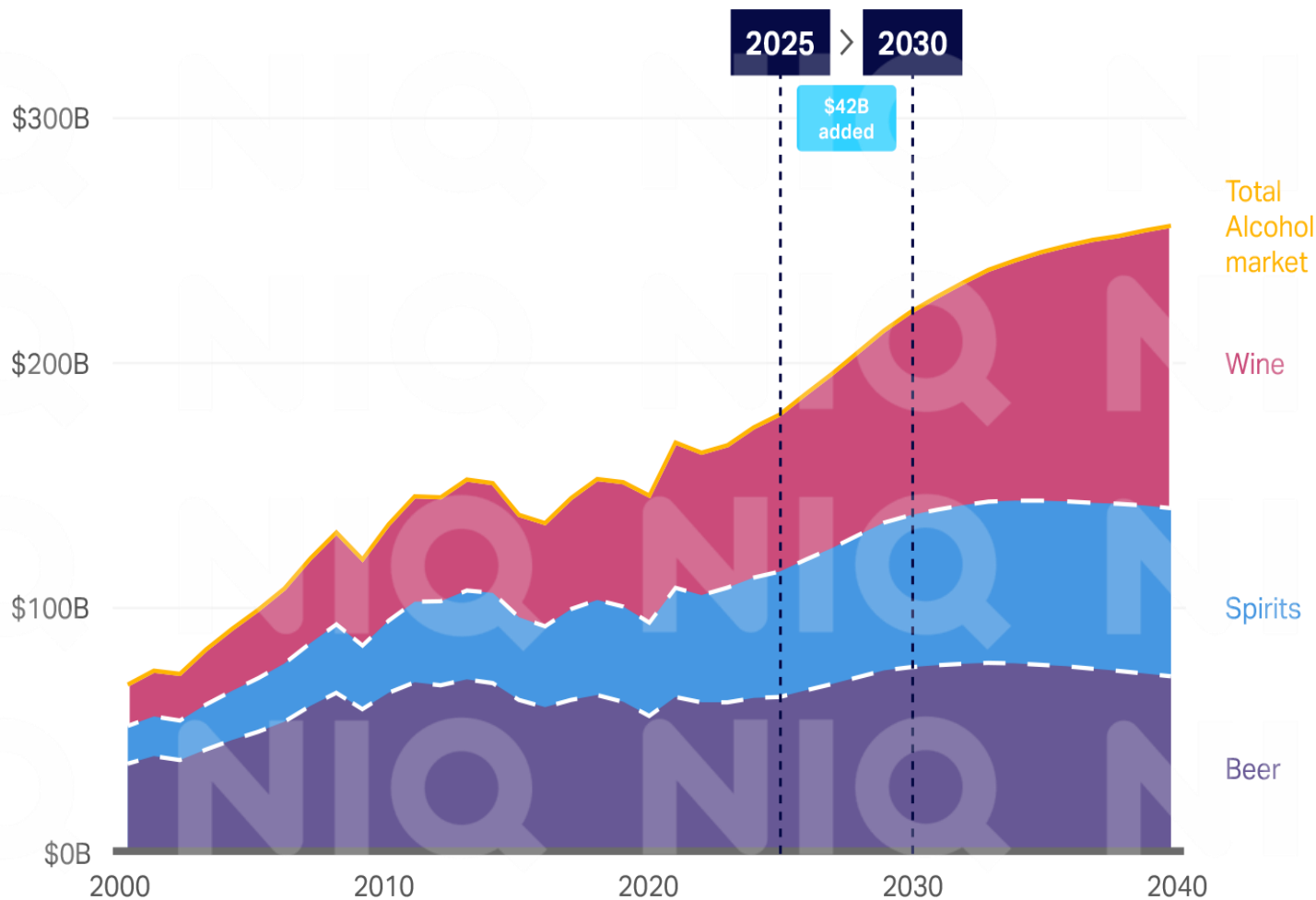
A photograph of two young men sitting at a table in a restaurant, smiling and drinking beer. The man on the left is pouring beer from a green bottle into a glass. The man on the right is holding a glass of beer. There are plates of food on the table. The background is blurred, showing other people in the restaurant.

酒类

Alcohol

未来五年，X世代的酒精饮料市场将增长至目前规模的1.2倍。

The Gen X Alcohol market will grow to 1.2x its current size in the next five years.



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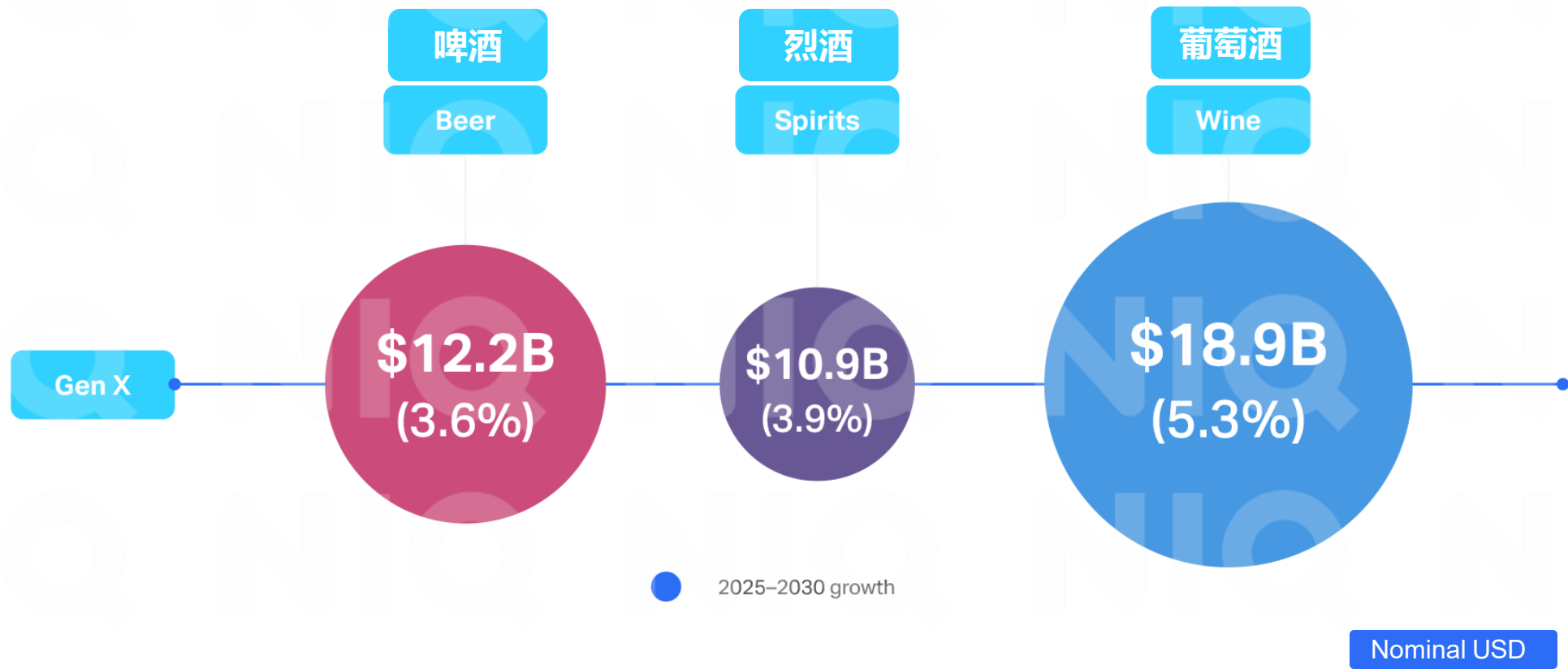
Nominal USD

全球X世代酒精品类支出增长

Gen X Alcohol categories spending growth globally

品类增长及复合年均增长率：2025–2030年

Categories growth and CAGR: 2025–2030

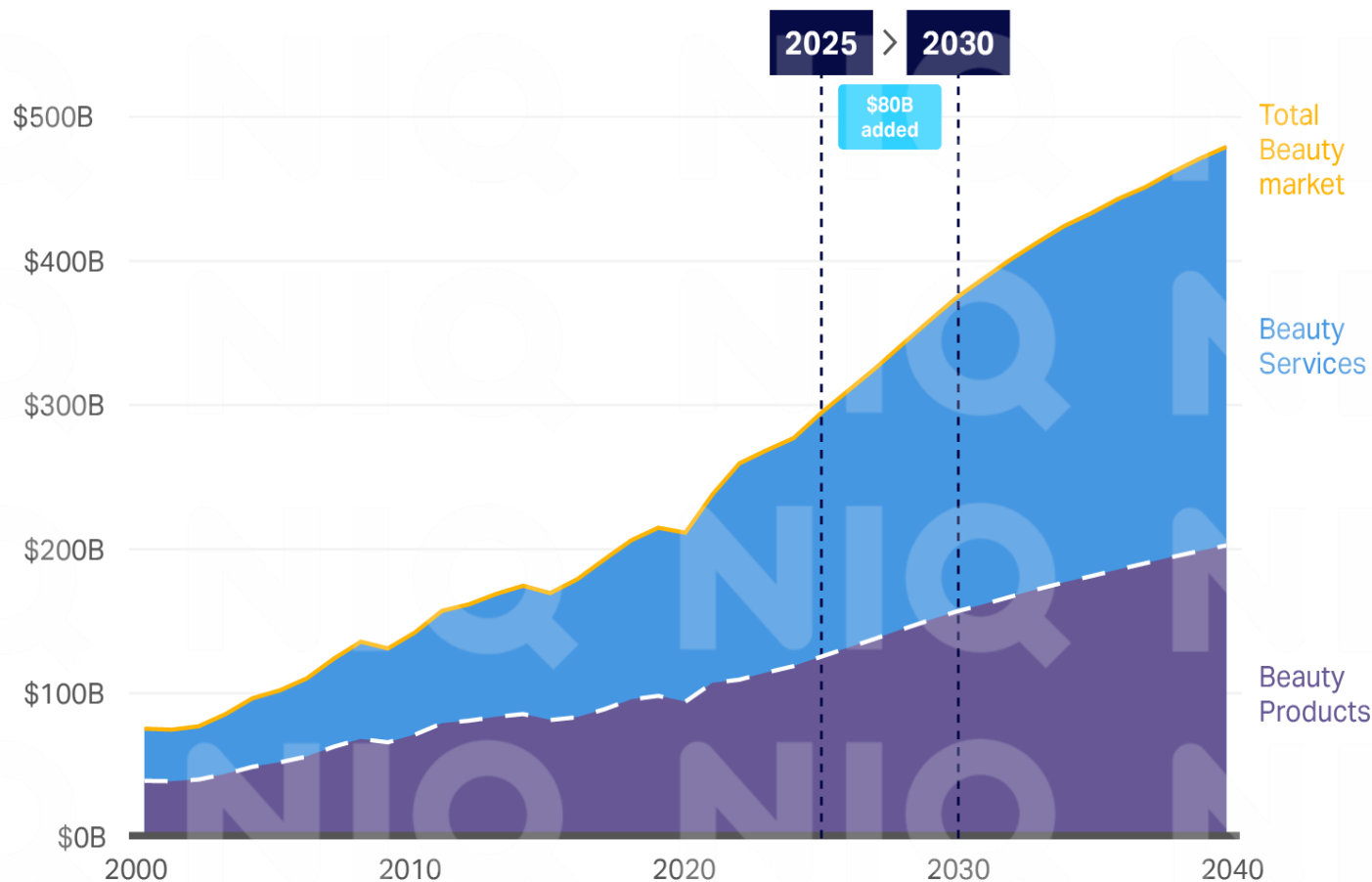


A smiling woman with dark hair pulled back, wearing a light grey ribbed tank top, is the central focus of the image. She is looking slightly to the left with a warm, joyful expression. The background is a bright, out-of-focus indoor space with a potted plant visible on the left. The overall tone is clean, modern, and positive.

美业 Beauty

未来五年，X世代的美业市场将增长至目前规模的1.3倍。

The Gen X Beauty market will grow to 1.3x its current size in the next five years.



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Nominal USD

全球X世代美妆个护品类支出增长

Gen X Beauty categories spending growth globally

品类增长及复合年均增长率：2025–2030年
Categories growth and CAGR: 2025–2030



制造商和零售商的关键点

Key takeaways for manufacturers and retailers

X世代偏好的购物渠道仍在持续演变

Gen X's preferred shopping channels continue to evolve



赢得X世代：出现在他们的购物场所

Win Gen X: Be where they shop

为X世代的购物方式而设计——而不仅仅是地点
Design for how Gen X shops, not just location

建立品牌忠诚度的关键：了解购物方式
Key to build loyalty: Understanding how they shop

全渠道先驱者，无缝融合了实体店、线上和配送服务
Omnichannel pioneers, blend in-store, online and delivery

数据驱动，优化体验
Data driven, Optimal shopping experience

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赢得X世代：让数据引领方向

Win Gen X: Let data lead the way

X世代并非铁板一块——细微差异至关重要

Gen X is not a monolith, nuance matters

X世代横跨不同的文化、经济环境和人生阶段

Gen X spans cultures, economies and life stages

在发达市场的行为模式与新兴的轨迹截然不同

Behavior in developed markets looks nothing as in emerging

若要在全球范围内赢得X世代，**需要依托本地化的数据，以反映地区现实如何影响他们的购买决策及动因**

To win Gen X globally, **you need localized data that reflects how regional realities shape what they buy—and why**



赢得X世代：赢得他们的忠诚

Win Gen X: Earn their loyalty

用数据揭示X世代真正重视什么

Let data uncover what Gen X really values

X世代并不张扬，但他们忠诚度高
Gen X isn't loud—but they're loyal

仅凭年龄或责任来推测消费习惯是远远不够的
Not enough to assume habits based on age
or responsibility

必须依靠数据来清晰呈现**他们实际的消费去向—以及信任、便捷性和全渠道行为如何体现在他们的购买习惯中**
Data must illuminate **where they're actually spending and how trust, convenience, and omnichannel behaviors show up in their purchasing behaviors**

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全球制造商与零售商的应对举措

Global manufacturer and retailer actions

制造商举措 *Manufacturer actions*

推出**感怀照料**、**健康长寿**和**便利性需求**的新形式产品和宣称
Consider new formats and claims geared toward **caregiving, longevity, and convenience in products**

零售商举措 *Retailer actions*

以**节省时间**、**助力照护**为产品和服务的定位。

家庭照护、**户外休闲**和**家用工具**是关键的增长品类。

打造信任与便捷的**全渠道**消费体验。

Position products and services as **time savers and enablers of care.**

Depend **Care, Outdoor Recreation, Tools** are key growth categories.

Deliver **omnichannel** experiences build trust and convenience.

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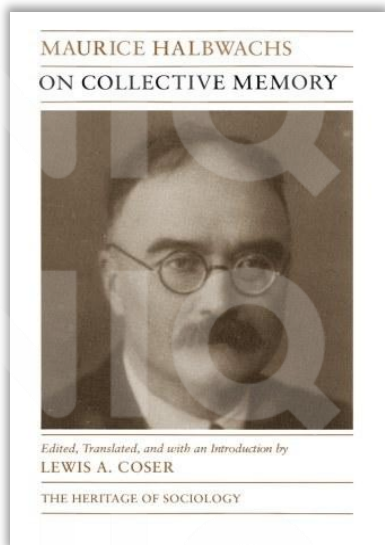


在中国影响X世代的因素

Factors influence Gen X in China

集体记忆是了解代际的最好方式

Collective Memory as foundation to know generations



莫里斯·哈布瓦赫
Maurice Halbwachs

1877-1945
开创集体记忆理论
The founder of collective memory theory

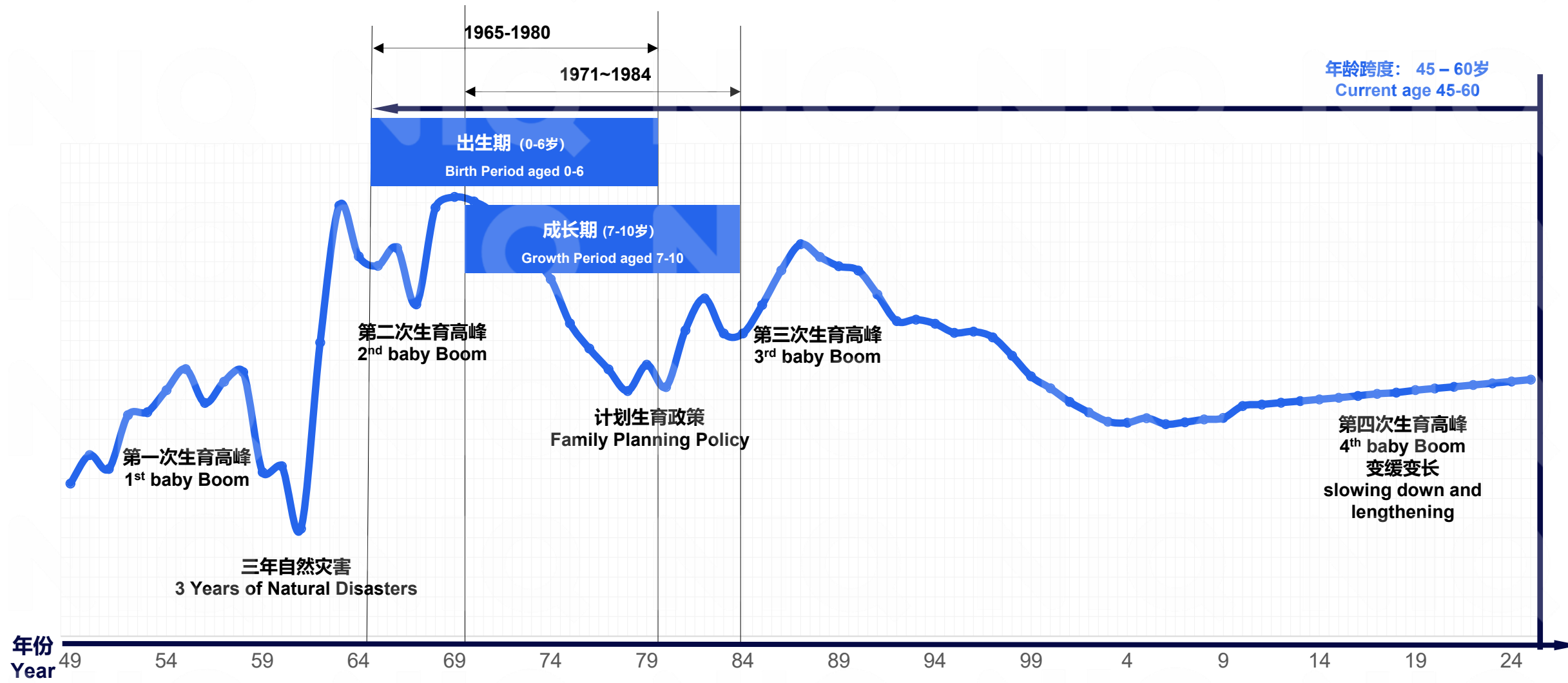
记忆是一种**集体社会行为**,现实的社会组织或群体(如家庭、家族、国家、民族、公司)都有其对应的集体记忆,对个人回忆和行为产生产生影响

Memory is a **collective social behavior**, and real social organizations or groups (such as families, clans, nations, ethnic groups, or companies and institutions) all have corresponding collective memories



中国 X 世代的年龄结构回溯: 多子家庭、生育低谷

Retrospective for Gen X: large families, low birth rates



中国 X 世代在价值观形成期的大事件

Major events in Gen X formative years



中国 X 世代对食品的价值观和消费动机

Gen X values and motivation towards Food



食品与非酒精饮料
Food & Non-alcoholic
Beverages

消费价值观 Food Value

务实主义与价值追求; 家庭健康守护者; 效率与便利

Pragmatism and Value Pursuit; Family Health Keeper; Efficiency and Convenience

消费焦虑 Food Anxiety

- **“健康守门人”焦虑:** 担心孩子老人饮用牛奶肠胃不适、影响营养吸收、钙质与蛋白质摄入不足
- **自身身体衰退焦虑:** 消化系统敏感度上升, 喝普通奶易腹胀腹泻, “想喝又不能痛快喝”
- **"Health gatekeeper" anxiety:** Worried about children and the elderly insufficient intake of nutrients
- **Own physical decline anxiety:** due to digestive system sensitivity, dare to drink ordinary milk

购物动机 Purchase Motivation

- **守护动机:** 为全家人找到一款所有人都能舒适吸收、无负担的基础营养品, 履行家庭责任
- **自我关怀动机:** 在照顾家人之余, 寻求能关爱自己中年身体的优质产品, 实现“无负罪感”消费
- **Guardian Motivation:** Find a basic nutritional product for the whole family
- **Self-care motivation:** products care for their middle-aged bodies and achieve "guilt-free" consumption

食品机会点 Food Opportunity

- **“家庭健康膳食的解决方案”:** A2鲜奶核心卖点, 只含A2型 β -酪蛋白, 更亲和人体, 更易消化。一次性解决了全家人的饮奶舒适度问题, 极大地降低了他们的决策成本和精神负担
- **“无缝升级”消费体验:** A2鲜牛奶的口感与普通牛奶无异, 只需简单替换, 就能静默升级全家人的健康体验, 完美契合其“效率与便利”的价值观
- **"The definitive solution to a healthy family diet":** A2 fresh milk is easier to digest. It solves the comfort problem of drinking milk for the whole family at one time
- **"Seamless upgrade" consumption experience:** The taste of A2 fresh milk is the same as that of ordinary milk. With a simple replacement, it can silently upgrade the health experience of the whole family

中国 X 世代对酒类的价值观和消费动机

Gen X values and motivation towards Alcohol



酒类
Alcohol

饮酒价值观 Alcohol Value

注重品质与传承，追求“低调的奢华”；社交中看重体面与尊重；欣赏有历史底蕴的品牌
Focus on quality & heritage; value decency and respect when social; appreciate brands with history

饮酒焦虑 Alcohol Anxiety

- **身份焦虑**：需要在不张扬的前提下，精准地展示自己的品味、成就和社会地位
- **体验焦虑**：追求消费带来的深层情感价值（如回忆、共鸣）而非单纯的功能价值
- **Identity anxiety**: the need to accurately display one's taste, achievements and social status without publicity
- **Experience anxiety**: the pursuit of emotional value brought by consumption rather than purely functional

购物动机 Purchase Motivation

- **认可动机**：渴望自身成功的努力和品味被同辈人理解和认可
- **联结动机**：在重要商务宴请或老友重聚时，创造一种深厚、融洽的氛围
- **Recognition Motivation**: Desire to have one's own efforts and tastes for success recognized by peers
- **Bonding Motivation**: Create a harmonious atmosphere at business banquets or reunions of old friends

酒类机会点 Alcohol Opportunity

- **“硬通货”**：马爹利XO作为干邑中的标杆，传递“有品位、重视这次相聚”，高效地解决了社交中的身份确认和选择成本问题
- **承载时光故事感**：XO (Extra Old) 意味着长达数十年的陈酿，契合了Gen X“历经岁月，方成佳酿”人生阶段感，与他们的生命历程产生深刻共鸣
- **"Hard currency"**: Martell XO, as the benchmark in cognac, conveys "tasteful and attention to this gathering", and efficiently solves the problem of identity confirmation and choice cost in social interaction
- **Carrying the sense of time story**: XO (Extra Old) means that the wine has been aged for decades, which is in line with the "sense of life stage" of Gen X, and deeply resonates with their life course

针对X世代，用什么能够助力品牌增长？

-- 尼尔森IQ品牌增长模型

To Gen X, what could contribute to brand growth?

With NIQ Growth Architect

了解消费者，精准定位，才能有效沟通

Only by knowing consumers and positioning accurately can communicate effectively

中国X世代典型的人群分类 Typical Gen X segments in China



增长和增长战略 都应始于消费者

*Growth starts with
your consumer, so should
your growth strategy*

“到目前为止，让我们成功的第一件事是我们对消费者的额外关注。”

“The #1 thing that has made us
successful by far was our obsessive-
compulsive focus on the consumer”

杰夫·贝索斯, 亚马逊创始人 Jeff Bezos



尼尔森IQ品牌增长模型 NIQ Growth Architect

释放以消费者为中心的洞察
 力，照亮您通往高收益销售
 和未来扩张增长的清晰路径
Unlock consumer-centric insight
 to illuminate your clear pathway
 to high-yield sales today and
 expansive growth tomorrow

实现全部增长潜力需要两种策略，一种是关注短期结果，另一种是随着时间的推移慢慢建立

Realizing your full growth potential requires two strategies, one that focuses on *short term outcomes* and another that builds *slowly over time*, think of it like this...

今天摘取最容易获得的成果

Picking the lowest hanging fruit today

销售激活带来短期结果

Sales activation to bring short-term outcomes

今天给树浇水，确保明天果实丰硕

Watering today to ensure prolific tomorrow

建立广泛的心理适用性以确保长期结果

Building broad mental availability to secure long-term outcomes

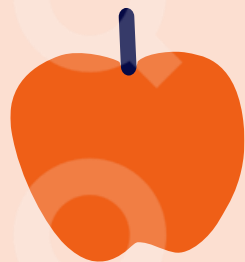


尼尔森IQ品牌增长模型可以帮助实现两种
NIQ Growth Architect delivers both

细分消费领域，实现短期和长期增长

Segmenting the consumer landscape to unlock both short and long-term growth

细分消费领域 Segmenting the consumer landscape



尊重消费者差异性，发掘重要的区别

Embrace consumer diversity and **uncover the differences that matter**

有针对性的激活策略

Bringing targeted activation strategy

- 焦点清楚 Clarity of focus
- 理解高收益目标 Deep understanding of high-yield targets
- 短期增长 Short-term growth

整合消费群体 Integrating segments



找到统一各部分的共性，同时尊重它们的差异
Find **commonalities that unite segments**, whilst respecting their differences

有更广泛的战略方案

Bringing your broad-based strategy

- 可拓展性 Scalability
- 广泛理解 Broad understanding across many
- 长期增长 Long-term growth

架构短期和长期增长 Architect short and long-term growth

细分 Segment



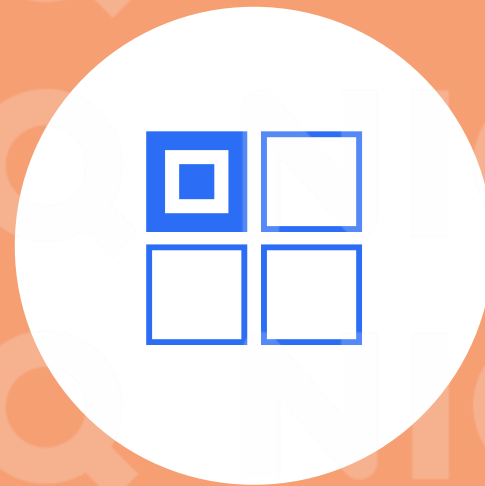
透过表面，揭开隐藏的成长之路
Look below the surface
and uncover the hidden
pathways to growth

挑选 Select



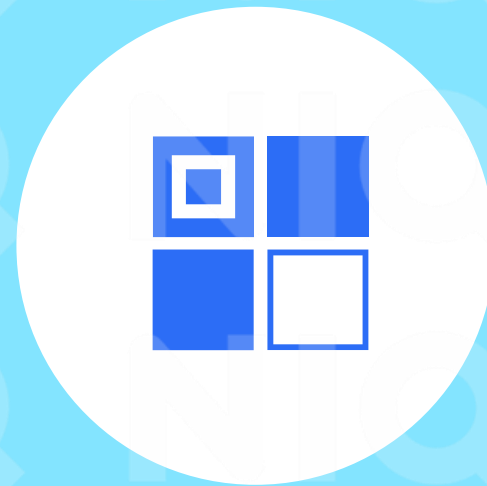
做出正确选择，为现在带来回报，为未来奠定基础
Make the right choices,
that pay off now and lay
foundation for the future

锁定 Secure



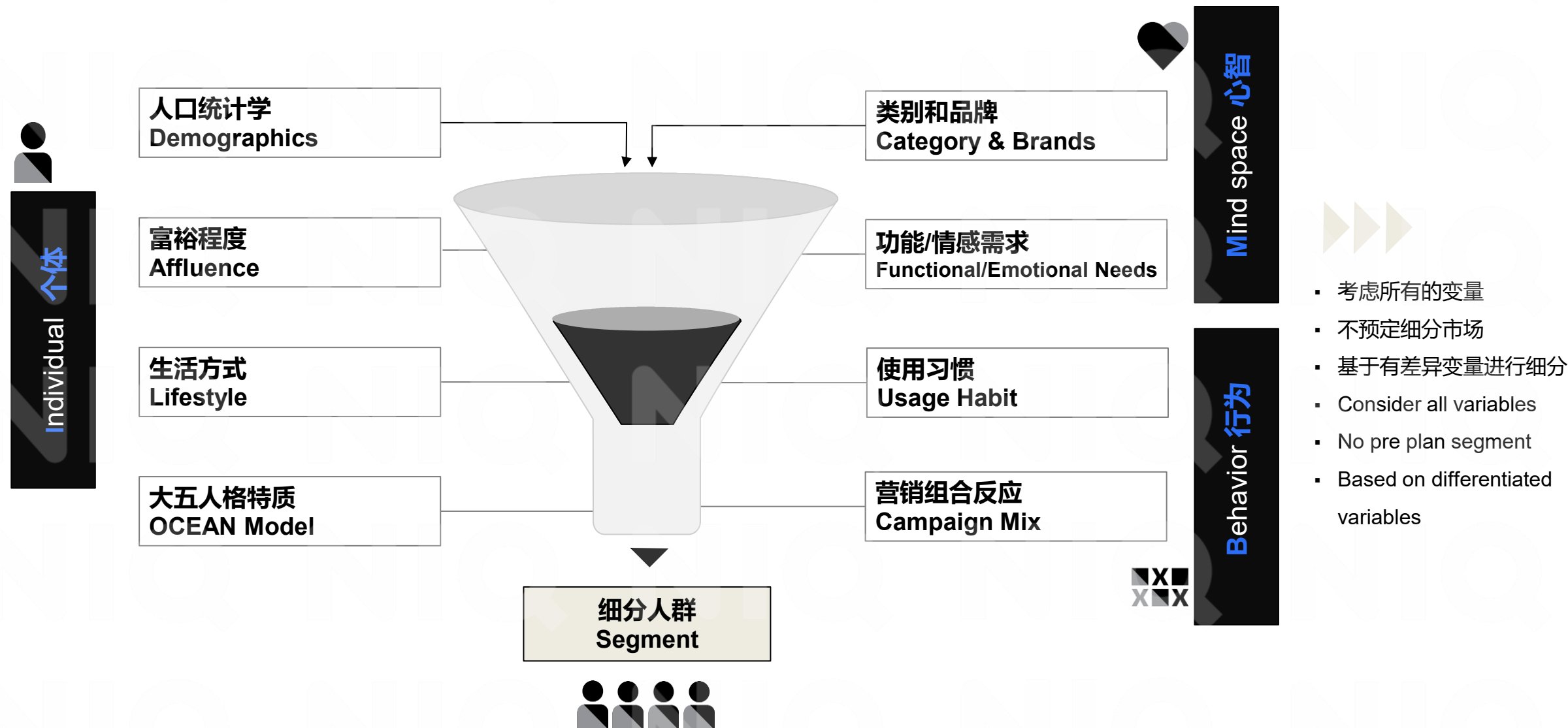
为不同的消费者带来价值，确保高收益用户回购
Bring value to diverse
consumers to keep high-
yield coming back for more

拓展 Scale



在核心目标之外发展品牌，增加触达率和未来增长
Grow your brand beyond
core target to increase
reach and future growth

精准细分人群 Segmentation Science



其中选对人群，才能够确保战略方向正确

Pick the fit segments to ensure the right strategic development

做出基于证据的战略决策，在对您的增长最重要的地方进行投资
Make strategic evidence-based decisions to invest where it matters most for your growth.

业务相关的关键绩效指标评估细分市场的吸引力并评估所付出的努力，这将需要您的品牌来吸引细分市场
Business relevant KPIs assess the attractiveness of a segment and evaluate the effort, it will take your brand to attract the segment.

机会潜力 Opportunity potential

机会潜力 Opportunity Potential

通过揭示推动每个人群价值的因素，评估该潜力的机遇
Assess the opportunity each segment offers by uncovering what drives value

大小 Size
选择能够扩充品牌触达的人群
Selecting segments increase brand's reach

升级潜力 Premium potential
选择与品牌调性一致人群，高端还是性价比
Selecting segments in line with your brand ambitions of becoming a premium brand vs. choice driven (mass) brand

大局 Outlook
将消费者宣称数据与NIQ专有销售数据的市场趋势相结合，确保您的品牌战略决策正确性
Ensuring future of your brand by combining consumer KPIs with market trends derived from NIQ proprietary sales data

吸引成本 Cost to attract

评估所需的努力，促使获得对应人群的关注
Evaluate the effort, it will take to attract the segment

品牌相对份额 Relative brand share
了解您目前在细分市场中的定位以及与顶级竞争对手的差距
Understanding your current footprint within the segment and the gap to your top competitor

竞争强度 Competitor intensity
评估竞争环境和参与者的分布
Assessing the competitive environment and the spread of players that need to be navigated

品牌适配度 Brand fit
审查品牌在满足细分市场需求方面的关联程度
Reviewing how well your brand is associated to meet the needs of a segment

吸引成本 Cost to attract

品牌增长模型统一策略 Growth Architect unifies strategy

我们模型有灵活性，使您可以根据**特定目标定制**，或通过组合使用案例来协调方法，以实现与您业务的**多个领域相关的统一战略**
We offer you the flexibility to **tailor to your specific objectives** or to **harmonize** the approach by **combining use cases** for a **unifying strategy** relevant for multiple areas of your business.



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感谢!
Thank you

X世代
Generation



不再被遗忘
Forgotten no more