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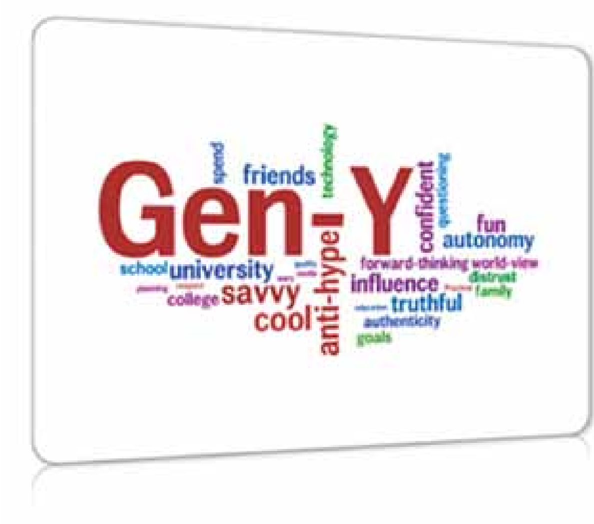
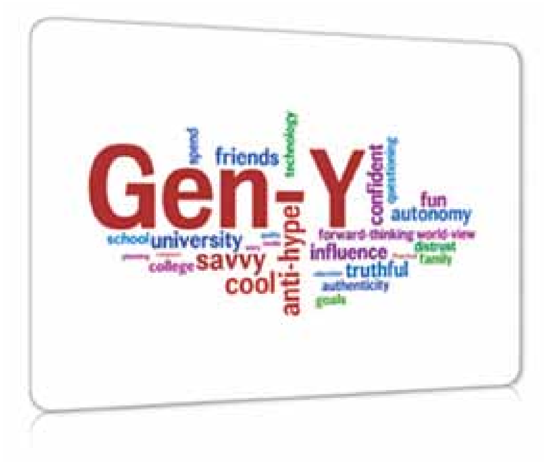


Future scenarios for the South African wine industry

Part 5: Generation Y: the new wine market colossus



Welcome to this edition of VinIntell as a value-added service to members of the S A Wine Industry. The purpose is to provide you, the decision-maker, with meaningful insight into events, trends, opportunities and threats through the analysis of the ever-changing competitive environment. The analytical approach is a multifaceted, multidisciplinary combination of scientific and non-scientific processes.
We trust that this publication will become part of your strategic thinking, strategic planning and decision-making process. You are welcome to send comments and suggestions to the publisher.

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INTRODUCTION

This is the fifth delivery in the PESTEL (Political, Economic, Social, Technology, Environment and Legal) series on the South African wine industry. Part 1 (May 2012) was about the impact of climate change; Part 2 (August 2012) concerned the impact of regulatory change; and Part 3 (November 2012) concerned non-tariff barriers as economic factor. Part 4 discussed ethics. The PESTEL series aims to unpack prominent macro factors[i] that impact on each category and at the end of the PESTEL series, a consolidated future picture featuring a high road (*Cup Runneth Over*) and a low road scenario (*Scraping the Barrel*) will be compiled.

This edition probes the emerging wine consumer globally and in South Africa, namely Generation Y (Gen Y). This consumer generation has become the new wine growth market and presents significant opportunities. These young adults are the children of Generation X and are also known as the Echo Boomers, Nexters, the Clickeratti, the Wired Generation, the Millennials or Restless Generation. Born roughly between 1983 and 1995, they represent the largest generation currently in South Africa namely a fifth of the population. They also differ from preceding generations and understanding what motivates their buying choice in beverages might open the door to significant business opportunities. Indeed, Deloitte describes Gen Y as the *"Powerhouse of the Economy"*[1] while Rabobank said in 2011 already that Gen Y consumer should be regarded as the new growth market. In the US, this generation counts between 75 million and 100 million consumers depending on how it is defined. They are regarded so important that in order to better understand them, they have been divided into two groups i.e. younger (22 to 25) and older (26 to 34). It has been found that 65% of the older group drink wine daily and more wine at each sitting namely 2.92 glasses. This generation should be in every marketer's scope for mainly two reasons: Their size and the impact of digital media in their buying decision.[2]

OVER TO GENERATION Y: NEW ADULT WINE CONSUMERS

The consumer market can be divided into various generations: The Traditionalists or Beat Generation (born roughly before 1946), the Baby Boomers (born roughly between 1946 and 1960), and Generation X (born between 1961 and 1981). The youngest generation having entered and entering the wine market are Generation Y (Gen Y). They have already started moving along an interest and adoption curve before becoming core wine drinkers. It is therefore

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[i] *Macro factors can be categorised using the PESTEL model. This classification distinguishes between political factors (that refer to government policy such as the degree of intervention in the economy); economic factors (interest rates, economic growth, and exchange rates), social factors (ethical business, transparency, changes in social trends can impact on the demand for a particular product); technological factors (social media, production methods and innovation that can lead to reduced costs and improved quality); environmental factors (the weather and climate change); and legal factors (legal and regulatory issues).*

not surprising that when facts emerge that over 50% of Gen Y, a generation larger in size than Baby Boomers, are on-boarding into wine as a core drinker, the wine industry is optimistic about the future. Furthermore, Gen Y'ers have started influencing how other generations live, love, and speak and their impact cannot be under estimated.

Although older generations—the Boomer and Gen X in particular, lump Y-ers together as "the kids," the reality is that a large number of Gen Y'ers are maturing into mortgages, cars, marriage and children. A 2009 Deloitte snapshot on the Gen Y'ers found that contrary to popular belief, Gen Y'ers are hardworking, future-oriented, ready to contribute now, opportunity-driven and therefore critical for global business in tough times. Many believe Gen Y will be the next "hero" generation - like other generations before them that grew up during crisis, they will become aggressive advocates of technological progress, economic stability, social harmony, protection of the environment and public optimism.[3]

Generation	Defining moments	Typical characteristics
Generation Y (1982 – 1995)	9-11. Enron, Emerging economies, the global economy, no life without computers	Techno savvy, connected 24/7, optimistic, confident, comfortably self-reliant, entrepreneurial, success driven, inclusive, environmentally minded, most hovered-over generation
Generation X (1961 – 1981)	Collapse of the Soviet Union and Merlin Wall, Corporate downsizing, punk rock, Iranian hostages, space shuttle Challenger tragedy, video games, MTV, computers at school and work, Apartheid	Sceptical, pragmatic, adaptable, self-reliant, informal. Techno literate, diversity-minded, focused on today
Baby Boomers (1943 – 1960)	Post WWII prosperity, Vietnam War, social protests, the Beatles, Civil Rights, Apartheid, Women's Lib	Competitive, optimistic, driven to achieve goals, focused on children, judgmental and differing opinions, political
Traditionalists Best Generation (1925 – 1941)	Korean War, Beginning of Cold War. Abstract art, Castro's Revolution	Non-conformist, bohemian, cool, questioning authority, apolitical, anti-intellectual

Source: Deloitte, 2011. A compilation by Deloitte of commonly accepted traits and defining moments by generation

CHARACTERISTICS OF THE Y GENERATION

Various factors influence the wine preferences and purchase decisions of Gen Y consumers. In order to establish and grow the potential success of a wine brand amongst Gen Y consumers, it is important to be aware of their needs, preferences, beliefs and behaviours. The following characteristics broadly describe typical Gen Y consumers:

- They grew up with the internet and therefore expect everyday-life activities to be easy and fast; and they want personalised products and services and a wide range of different options.
- They are globally connected and interactive and communicate with everybody everywhere.
- They embrace diversity more than any previous generation. This trend can also be observed in their choices of retail products and social groups: They believe in the concept of a "united-Generation" instead of a "me-Generation" and value group work and team spirit. Although diverse, they are inclusive and highly community-minded. They reflect some of the same values of the Boomers and Gen X'ers but have put their own context on them that reflect their own unique experiences. They have watched the world go through booms and busts, grown up amidst armed conflict around the world, global terrorism, but also in a very different South Africa. The older group of South African Gen-Y's would probably not be able to remember much of the political transition, while the younger group of Gen Y'ers do not understand what it was like under apartheid.

> *"They know the way things go down and ar no longer naive about the workings or the world and the intentions of businesses and other organizations."*
>
> *– Peter Sheahan from "Generation Y: Thriving and Surviving with Generation Y at Work."*

- They are committed to their work and some work more than 30 hours a week. They are determined, goal driven, take on tough challenges and are an achieving generation with strong aspirations. They are also self-starting (entrepreneurial).
- They pursue a life filled with challenges, novelty and changes.

> *"Although they are better educated, more techno-savvy, and quicker to adapt than those who have came before them, they refuse to blindly conform to traditional standards and time-honored institutions. Instead, they boldly ask, 'Why?"*
> *– Eric Chester from "Employing Generation Why?"*

- They are often tagged as a self-entitled group raised during prosperous economic times, yet they are also highly restless, raised in an era of rapid technological change.
- They take on more responsibilities at a younger age and are eager to move forward.
- They are not immune to the impact of globalisation and international influences but it is also true that there are local differences based on situational context both from country to country and within national borders such as between South Africa's townships and suburbs.
- They are self- confident, optimistic, hopeful and independent and lifestyle means a great deal to them while they are also much more open to change than their parents and grandparents.

GLOBAL YOUNG ADULT TRENDS

An interesting recent Euromonitor study into consumer trends among young adults globally found that these consumers have to deal with being thrifty at a time of protracted economic woes. However and important to note, they are not dealing with this and other of life's current challenges in isolation. On the contrary, they link to and learn from other consumers and brands through tech-enhanced communications, particularly their smartphones, to mould their lifestyles. The main trends that have been identified in various studies can be summarised as follows.

- **Urban living and having fun:** In 2012, Euromonitor International forecast that there will be 3.7 billion urban residents worldwide and this number is set to increase globally. The new arrivals however have less disposable income but aspire to a higher consumption that will extend to more space. 2012 megacities are hubs of new and established ethnic groups and culture, older people with trend-sensitive lifestyles, students, highly skilled and low income migrant workers, consumers on city breaks, LGBT (lesbian, gay, bisexual and transgender) consumers and cross-generational households. Related to urbanisation is the fact that high cost of living, job losses, growing student loans and the need to save more for first homes are pushing more young adults into delaying taking the steps that traditionally represent movement into adult life. An increasing proportion is living in multigenerational households comprised of parents and grown kids and even an older or younger generation in a trend dubbed 'famwich'.[4] Many young adults are essentially postponing adulthood and all of the family responsibilities and extra costs that go along with it.[5] Interestingly, globally, family priorities are not top of the youth agenda: rather, good health and having a rewarding job/work are seen as more conducive to happiness than being a parent. Having fun and an active and varied social life is more fulfilling than raising children.

- **Critical and vociferous and brand redefined:** Gen Y'ers are critical consumer and are increasingly articulate and outspoken. Their voices and protests are heard from neighbourhoods, cities and countries to the internet. This trend sees consumers who are now less loyal to brands getting together to make demands from companies and state institutions. They are often fuelled by widening income inequalities, unfairness and price rises. In 2013, status becomes more than *what* you consume and *who* you are and crucially about *how* your brand is linked to and ranked by others. Wine brands therefore must appeal to this target market by fulfilling their need for connection, diversity, time with friends, civic activities, environmental preservation, authenticity, quality, inspirational experiences, access to information, and continuous learning. At the same time wine must be affordable, of good quality, available instantaneously and provide a unique "experience."
- **Taking control:** With the heightened access to more and better information, young consumers have and are taking more control over aspects such as their health choices, what they buy and what they consume. The importance of the greater need for control over lifestyle and persona is brought into sharper context by the financial uncertainty of recession. In this climate, non-monetary forms of status such as skills, eco-credentials, generosity and connectivity will become more of a priority.[6] With a limitless world of information at their digital fingertips they can design their own lives and if they do not like the offering, they simply turn to the next best option.[7]
- **More emerging market shoppers:** In 2012, millions of emerging market shoppers around the world are aspiring to more consumption. They are now enjoying malls and chain stores with shopping centres now also attractive to the less affluent. Emerging market consumers are learning to rely on credit, with store cards appealing to lower income consumers with low access to banking services. Counterfeit items continue to appeal to emerging market consumers as they bring access to trend-led consumption lifestyles and variety. Convenience has become important for the growing number of time-stripped middle class consumers. Consumers with more wealth are blending shopping with tourism as they spread their consumption influence.
- **Thrift rules:** Being price conscious is a reality for millions of consumers in the current dire economic time, in developing and developed markets. It is commonplace for Gen Y'ers to

boast of how little something cost them. For many, thrift is not just a way of life; bargain hunting is the new shopping therapy for many who channel the thrill they used to get from shopping into a quest for bargains. According to Euromonitor, since 2012, consumers are being directed into a deal ecosystem in which the *"chase, control, perceived savvy, and novel tech-led thrift-alerts (such as apps that send coupons to mobiles) make smart shopping." Against this background, d*ebt is this generation's problem too but especially in emerging economies, young consumers are not financially savvy and are racking up debts buying clothing and electronics. The rapidly rising cost of higher education in many countries is also saddling many young people with debt. In more developed economies, Generation Y consumers are often prematurely prosperous and control their own finances at a very early age.

- **Reality life:** Reality culture has changed the paradigm of who is seen as an opinion leader. Around the world ordinary people appearing in reality programming are claiming the spotlight of the talented famous and consumer attention as well as lifestyle aspirations. Young adults even rank celebrities slightly higher than political or community leaders in terms of who they most look up. However, results from the Euromonitor International Global Youth Survey of young consumers conducted in 2012, indicate that consumers aged 16-24 also tend to look up to their parents and significant others as role models rather than teachers and politicians.[8] Gen Y'ers will turn to friends, family and experts for advice.[9]
- **Tablets and smartphones are the universe:** Worldwide, smartphones are the communications accessory of choice, including in emerging markets where consumers are taking up new, more basic models as this device moves from being a luxury item to a necessary lifestyle aid. According to research provider Gartner worldwide sales of cellphones to end users reached 419-million units in the second quarter of 2012, a 2.3% decline from the second quarter of 2011. However, smartphone sales accounted for 36.7% of total cellphone sales, and grew 42.7% in the second quarter of 2012 from the same period a year before.[10] PCs and laptops are beginning to take a backseat as most smartphone owners use these convenient devices to surf the internet and watch TV anywhere. Price deflation is likely to result in parents' gadgets becoming increasingly affordable to this generation, which will inevitably lead to more parents buying them for their children. The trend towards high-tech devices for youth will also become increasingly prevalent in emerging markets like South Africa.
- **Life is tech and tech is life – but as an instrument:** By extension to the previous point, social networking through use of social websites like Facebook®, Twitter® and LinkedIn® is dominating Gen Y's communication and connectivity means. Teens and young adults are increasingly turning to social websites and the Internet to learn about products and make purchases. Clever clothing brands like ASOS or Zara and many others are courting this youth interest in style and shopping and offering young fashionistas the chance to express their love of clothes inspired by street style. Access to the internet has also extended to accompany people as they go about their daily lives, at work and on holiday. Mobility is becoming less about devices, and more about the data that is generated with every

interaction on the internet. Euromonitor International's Annual Study 2011 shows that with the exception of internet banking, younger respondents do more on the internet and do so more often. They are four times as likely as consumers aged 60 and older to own internet-equipped mobile phones (40% versus 12%). Important to note from a marketing viewpoint, studies have shown that this generation does not prefer online communication to face to face communication. Neil Howe, co-author of Millennials Rising said, *"It's not technology; it's their friends and groups they're addicted to."*[11]

- **Taking control of health:** In 2012, the spotlight on weight is just part of a renewed public awareness of what this generation eats, their body image, exercise and general health. Gen Y regards health as the most important determinant of happiness (even if awareness that health does not always lead to healthy living). Maintaining a healthy weight is also highly important and they are critical of the content of products they buy.
- **Unemployed and in limbo:** Youth unemployment is increasing.[ii] Young people are giving up on the search for work depriving society of a generation of skilled workers and buying power. According to the International Labour Office (ILO) global youth unemployment has risen to near its crisis peak and predicted it will keep rising over the next five years (to 2018).[12] In Sub Saharan Africa, by 2015, 28 million people will be unemployed as opposed to the 26.6 million of 2013.[13] Besides the negative effect on buying power joblessness, it will increase the social unrest risked by large parts of the young population out of work and highlighted a rise in the number of young people neither in employment nor in education or training, the so-called NEET group. Increasing numbers are settling for part-time work or for temporary jobs. Informal employment among young people remains. Three out of four respondents aged between 16 and 24 in the 2011 Euromonitor International's Global Youth Survey, say that unemployment and lack of job opportunities will probably have an impact on their future happiness, and are concerned about their future job prospects. They have been described as "generation limbo – highly educated 20-somethings struggling with dead-end jobs and NEETs; with few work prospects. For young people that have been raised with technology offering instant results, it is especially difficult growing up in an economic downturn in which they are under great pressure to achieve.
- **Unique wine consumption habits:** Gen Y'ers are easily influenced by other people especially peers and if friends and family are drinking wine, they are more likely to also drink wine. As a result of this ease of influence, Gen Y'ers consider recommendations made by retail personnel on the floor more important than their counterparts in older generations do. Gen Y'ers are more likely to drink wine in bars and restaurants, compared to the older generations who prefer to drink wine at home. That probably has to do with the fact that young

[ii] *Euromonitor: Youth Unemployment Rate refers to the young unemployed aged 15-24 as a percentage of the economically active population of the same age.*

adults prefer drinking wine in social contexts and for relaxation, for example with friends and family in a bar or with a meal. Although there are significant differences in preferences for wine and the purchase volume between Gen Y and the older generations, purchase frequency is similar for all generations examined, Gen Y'ers purchase lower volumes of wine than their older counterparts and prefer purchasing their wines in grocery stores, whereas their older counterparts preferred purchasing from liquor stores or wineries. Gen Y'ers are experimental in their wine consumption and have a diverse preference.[14]

SOUTH AFRICA'S YOUNG ADULT POPULATION

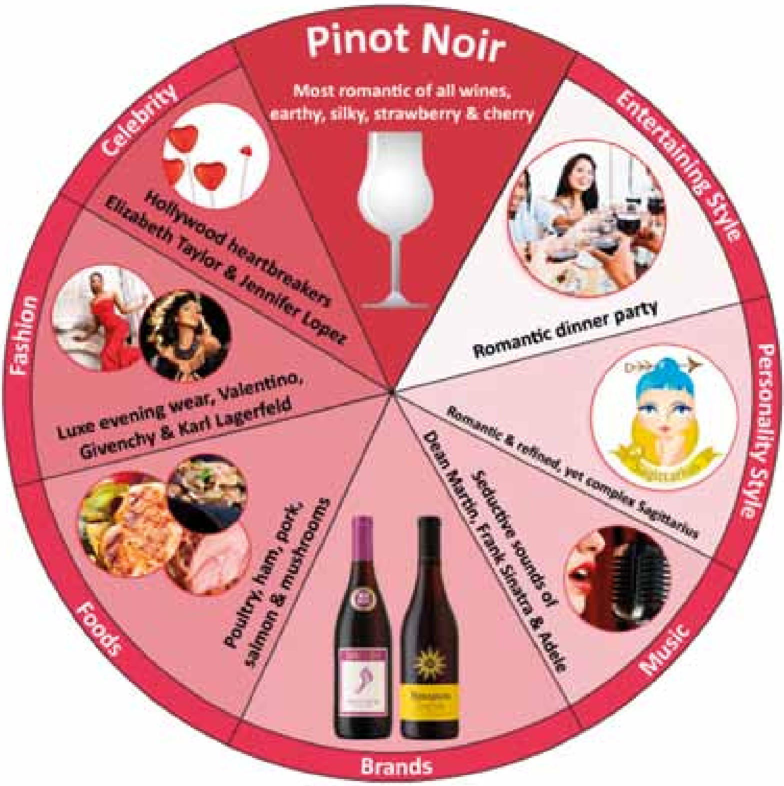
According to Stats SA's Mid-year Population Estimates 2013[15] South Africa's adult population (20 to 24-year-olds (i.e. those born after 1989) total more than 5 million of whom 2.53 million are male and 2.50 million are female. Of the total adult population as at May 2013, 4.1 million are African, 419,741 are Coloured, 109,921 are Indian / Asian and 314,320 are White. The generation that is just a little younger and the youngest of whom will reach drinking (18) by 2016 looks as follows: They total 5.16 million of whom 2.6 million are male and 2.58 are female. Of the total population of 15 to 19 year-olds in South Africa as at May 2013, 4.3 million are African, 449,639 are Coloured, 102, 946 are Indian/Asian and 313, 235 are White. Adding the totals of the age groups 15 to 19-year-olds and 20 to 24 year-olds together, the total population of the new adult generation in South Africa is 10.2 million or roughly 20% of the total population. Of this total, 8.5 million are African, about 900,000 are Coloured, 212,000 are Indian/Asian and 840,000 are White. In South Africa, Gen Y will continue to grow over the next 20 years at twice the rate of the overall population. It is estimated that by 2020, Generation Y will represent about 32% of the total population. It is clear that this young generation is the largest economically empowered population age segment in South Africa, dominating every industry over the next 10 years.[16] In order to capitalise on the significant buying potential however a stronger wine culture must be cultivated especially among the emerging consumer and to get Gen Y'ers to change to drinking wine rather than other alcoholic beverages.

MARKETING TO THE Y-ERS

With digital media having become pervasive and having revolutionised the way the wine industry communicates, it is important to understand what the techno-wise Gen Y'ers think about most traditional marketing and sales pitches: "*They are lost on us.*" Why is this? *"We not only grew up with it all, we've also seen it all and have been exposed to it since early childhood. We are instant gratification seekers and have grown at a velocity like no other – expecting movies, music and products at our fingertips. Watch a Gen Y'er wait for a text response that takes longer than 15 seconds, and you will know what I'm talking about."*[17]

By understanding the desires and needs of Gen Y'ers, their lifestyles and the way that they connect with one another, wine marketers can successfully communicate with them and capture their hearts and minds. It is increasingly difficult to reach success in the domestic wine industry today due to strong domestic wine competition, together with the fact that other alcoholic beverages (beer and ciders and RTDs in particular) are claiming a large section of this young generation. In order for wine brands, wine cultivars and wine styles to remain attractive and relevant, they have to communicate *with* the young, novice wine consumers and not *to* them. Gen Y'ers want to connect with the wine brand – they want a wine story, wine identity or wine personality that can ignite their imagination and stimulate their perceptions when they are enjoying the wine.[18] It is important to understand that although there are universal traits, there are also differences that are not universal across the globe; similar age groups in different countries will display different wine behaviour and consumption patterns.[19] Some of the points that should be part of the marketing mix are the following:

- With Gen Y'ers less brand loyal than earlier generations, it is useful to consider that quality and price rank higher than brand names.
- Gen Y'ers are tied to their mobile phones; therefore brands must reach this generation through mobile devices. This requires more than just having a mobile-friendly site; brands are conspicuous when they offer an app that provides value and is truly useful.[20] As a result of the strong connection to media and technology, Gen Y'ers are therefore more likely influenced by information they find while connected and are influenced by factors beyond the control of marketers. The key to reach the heart and mind of this consumer is engagement and appealing to their sense of connectedness to the world and belief in their potential to be agents of change for example to contribute time and energy to social and natural causes.[21]
- Content advertising and marketing is becoming increasingly important when marketing to Gen Y'ers. This cause-related marketing also holds true for the South African Gen Y. In an article "Black to the Future"- South Africa's Gen-Y, Collin Smith of Tomorrow Today writes that from a marketing perspective, South African Gen Y's cannot be put into a box.[22] They maintain their connections with their township roots despite having moved to the suburbs and are more likely to be attracted to corporate cause-related initiatives. Cause marketing should be an imperative in the marketing mix that should aims to instil connectivity based on a shared value and that transcends product. Furthermore the marketing message should include messages of community upliftment and social responsibility particularly given South Africa's political experience.
- A Gen Y'er is literary connected to the internet and social media 24/7 and can instantly share their views and perspectives with others. This is both threatening and opportunistic. They are one another's opinion leaders and they listen to what their peers think about a product, service, news topic etc. Therefore, recognising that good Word-of-Mouth increases the consumer following for a specific wine brand and that negative publicity could ruin a wine brand before it even has the opportunity to penetrate the market is important when formulating the marketing message.



Source: E.&J. Gallo

- Marketing messages have to be highly targeted to find a resting place in the buying decision. One of the motivators and habits of this generation is food and cooking. By extension, this generation shapes up as an ideal consumer of wine to accompany and enhance meals at home. Taking up on this lead of the high level of interest between this group and wine consumption, E. & J. Gallo Winery has started to focus on Gen Y'ers via sophisticated marketing programs that include grocery partners.[23] Gallo added a retailer component to its entry into Gen Y marketing because of previous success with many programs based on research and collaboration with its customers. The first campaign, called "Pair It, Share It," aimed to relate to Gen Y'ers by speaking their language – in store, online and on mobile devices. Using social media and a unique web site called The Daily Meal, the campaign taught Gen Y'ers about wine and food pairing and how to take and share photos of their food. It also allowed them to engage and get recommendations from others using the #PairItShareIt Twitter feed. Also, Gallo engaged Gen Y'ers in-store through displays, point of sale, recipes and pairing guides starring two of its Italian Pinot Grigio wines: Ecco Domani and Maso Canalli. Many of the brands are on Facebook and Twitter, and Gallo also does significant work on specific smartphone apps.[24 25]

- Gen Y'ers' preference for wine is influenced more by marketing techniques such as in-store displays/promotions and labelling, probably because they are less knowledgeable in general about wine and understand less detail than older generations. Because Gen Y'ers have a more limited experience in wine, they are more easily influenced by certain marketing strategies that target their interests. In store promotion and creative labelling are most influential on the wine purchasing behaviour of Gen Y'ers; therefore it is in the wine industry's best interest to focus on these areas for advertising. They are also more receptive to alternatives to the norm, including screw cap closures, portable packaging such as boxes and bags, and smaller sized portions.[26]
- With Gen Y'ers being more open to new experiences a new types of wine, marketers could consider focusing their new product advertising directly on Gen Y'ers instead of older generations, who are already set in a patters in regards to wine preferences.[8] Gen Y'ers would choose trendy wines including Pinot Noir, Merlot, Zinfandel and Malbec while the demand for Riesling, Pinot Grigio and Chardonnay is growing in the white category. The younger Generations X and Y are especially open to the latest, hippest and most esoteric wines rather than Bordeaux wines.[28]

CONCLUSION

It is clear that the young adult market segment is a highly different one in character than previous generations most notably the Baby Boomers and Generation X. This generation is also a significant market force and in the US they are the biggest consumer group in history. Digital media has revolutionised the way Gen Y'ers receive information and the way the wine industry communicates with them. This young adult wine appreciator does not care about soil composition, terroir and residual sugar; they want to have simple fun drinking authentic, quality and well-priced wine. In order to achieve brand distinction, there needs to be a deeper engagement with the audience e.g. by creating a platform where their consumers can gather and socialise and, in turn, consumers get exclusive products and services. The bonus for brands comes when consumers take their engagement a step further, by sharing their brand ambassador status with their friends and colleagues on social media channels. In a world where people rely on recommendations from friends, this endorsement is invaluable. With content advertising through social media becoming increasingly important, this observation of Alan Kroft of Mutineer magazine rings true: *"There is a great deal of misinformation and misunderstanding of the Gen Y wine consumers that is over complicating communication and marketing opportunities that are very simple at their core."*[29]

ENDNOTES

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