

## Lifestage Marketing - US - November 2014

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“FS marketers continue to be challenged by the changing world of communication and the specific financial needs and demands of each generation. Collaborating closely with technology for quick and efficient communication as well as seamless and innovative product and service delivery could help the industry keep up with consumers.”  
– Monica Staco, Financial Services Manager

### This report looks at the following areas:

- How can FSI effectively reach consumers from three different generations?
- Can FSI do more for Gen Xers and Boomers?

American consumers are becoming more diverse in terms of age, communication habits, and lifestyle. Understanding their needs and effectively communicating to them are increasingly more challenging to marketers. This report will look at the differences between three key generations – Millennials, Gen Xers, and Boomers – their communication habits and preferences. Their financial goals, trust in FS representatives, and ownership of electronic devices will guide a deeper dive into understanding each generation and will determine the ways to best get their attention and impact their purchasing decisions. Lastly, key interest in new FS products and services will be reviewed.

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