MAKE OPINION

Create Surveys. Reach People. Understand Results

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Gen Z and beyond In Market Research

- GenZ’s essence as digital natives
- Survey experience for GenZ

Who is Gen Z

Gen Z, born between the mid-1990s and early 2010s, grew up surrounded by technology. They care deeply about inclusivity, social justice, and being real. They're flexible, value community, and are driven by a desire to make a positive impact on the world.

- **Digital Native**
- **Community Driven**
- **Values authenticity**
- **Short Attention span**

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Gen Z in Germany in Numbers

The perception of Gen Z as simply "**young people**" is quickly becoming outdated. From shaping consumer behavior to becoming an integral part of the workforce, Gen Z is no longer just a group of teenagers but a driving force in society.

15-20% of Germany population

75%+ GenZ are active consumers

8-10% of voters in Germany

2025: expected **27%** of workforce

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Survey Engagement

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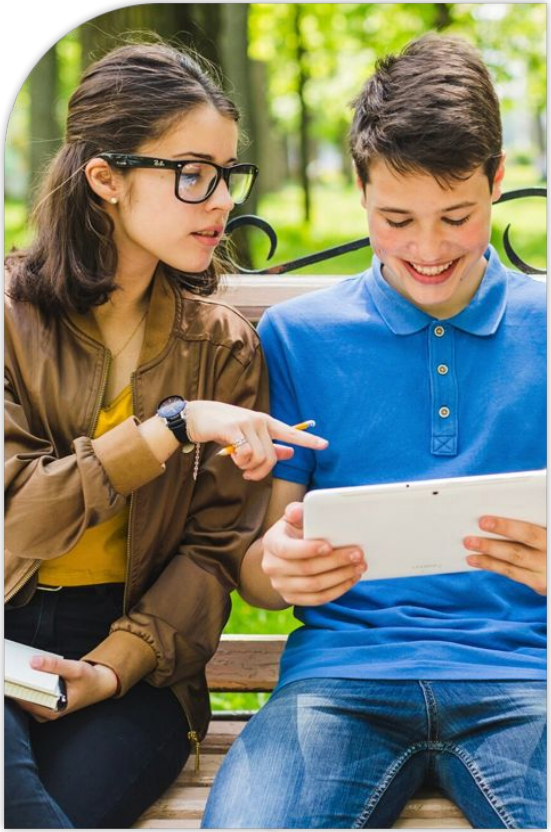

Gen Z in Online Sampling

We’re always looking for better ways to connect with Gen Z and the next generation, because getting young people to take surveys has become a big challenge in our industry. By learning what they care about and adjusting how we reach out, we’re working to make it easier for them to share their opinions and for researchers to tap into their insights.

- Hard to reach
- Low recall rates
- Short attention span
- Mobile first

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Gen Z general attitudes tracker Germany, October 2024

Traditional Tracker

150
Gen Z

150
Other Generations

Gen Z refined questions, wording and tone

150
Gen Z

43 Questions

18 min
estimated length of interview

10%
estimated drop rate

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Gen Z
as survey takers

With the 2024 tracker, we really wanted to get a sense of how people **feel about taking surveys** and what **motivates them to participate**. It's about understanding their experiences and what drives them to engage.

Make Opinion Gen Z tracker 2024

- Motivation to answer surveys
- Incentives perception
- Quality of surveys
- Survey length and short attention span

Survey time and incentive value

Willing to invest time for surveys

Gen Z is willing to invest their time in completing surveys, as long as the expectations around **time commitment** and **rewards** are clearly communicated upfront.

Value Experience over incentives

A good, straightforward survey experience combined with **real-time incentives** drives better long-term engagement than relying on **overblown promises** of rewards.

Describe surveys as Time Consuming

Gen Z: **29%**	Other: **35%**

See cash / PayPal transfers as the ideal incentive

Gen Z: **77%**	Other: **70%**

Incentives value for:	Gen Z	/ other
1. Fair and worthwhile:	**46%**	**27%**
2. OK, can be improved:	**40%**	**52%**
3. Value too low:	**13 %**	**19%**

Survey quality and length

Short Attention Span is a myth

Gen Z is willing to complete longer surveys without compromising quality, as long as the questions are **easy to understand** and **non-repetitive**. They place a high value on their time and expect surveys to respect that.

Faster to dismiss a bad survey

Gen Z is more likely to drop out of surveys or experiences that don't respect their time, especially when the questions are unclear or require multiple readings to understand.

Would describe surveys wording as authentic

Gen Z: **66%**

Other: **67%**

Questions in surveys are easy to understand most of the time

Gen Z: **74%**

Other: **84%**

Consider a 42 questions survey as “good length”

Gen Z: **83%**

Other: **78%**

Gen Z
as survey takers

We also tested a separate version of the 2024 tracker, using more familiar language and visuals throughout the survey to see if this would influence how Gen Z perceive the survey and the results we get.

Make Opinion Gen Z tracker 2024

- Is there a difference in results?
- Is the survey perceived differently?

Survey tone and wording familiarity

- No change in survey results
- No change in survey length perception
- No change in incentive value perception

Know your Gen Z segments

Don’t assume your Gen Z segments align with the generalizations you see in the media, take the time to truly understand them instead.

Clarity over imitation

When designing surveys for Gen Z, don't try to mimic their habits, communication, or style, focus on clarity instead.

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Using Video Answers
instead of Open Ended Questions

We wanted to explore whether video answers could be a viable alternative to traditional open-ended text responses, giving us richer insights while still being easy and engaging for participants.

Make Opinion Gen Z tracker 2024

- Webcam acceptance rate
- Costs
- Richness of answers

Video Answers in Surveys

Webcam Acceptance Rate: **<5%**

Price: **High**

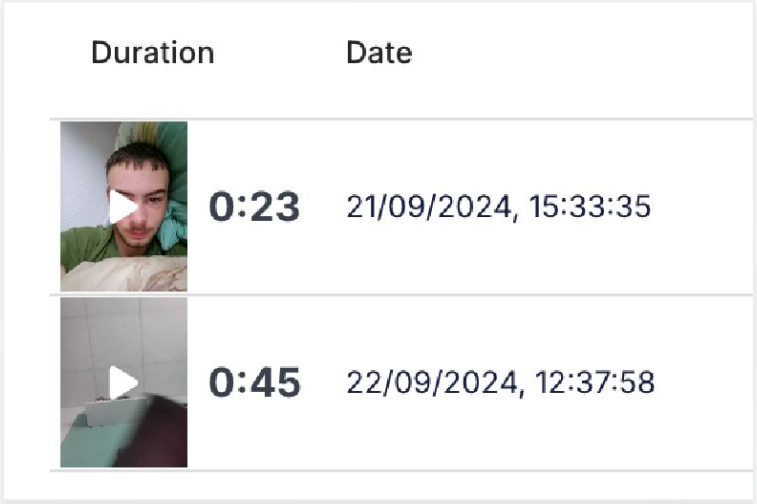
Richer, more in depth answers

Representativity concerns

With the low acceptance rate for webcam access, there are still open questions about the **representativeness** of video answers in a quantitative survey.

Recommended for specific scenarios

Video answers are best suited for gaining **richer insights** on specific topics, rather than being a full replacement for traditional open-ended questions in surveys.



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Gen Z and surveys

Know your sample supplier!

Understand their survey experience

Understanding the respondent's experience, from the moment they start your survey until they receive their incentive, is key. A consistent, positive experience is what drives them to share more **insightful opinions**.

No routing!

While routing respondents to find the next survey may maximize revenue for suppliers, it often creates confusion and frustration for Gen Z participants.

Right communication channels

Always be mindful of where your respondents are and meet them there—**push notifications** work better than email for engaging them effectively.

Value their time

Clear, easy-to-understand long surveys are still more effective than medium-length surveys filled with loops and grid questions.

Always mobile first

Gen Z lives on their phones, so ensure every experience, including surveys, is **mobile-native** and **best in class**.

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Gen Z and Older Gen

Users Comments (Thank you Screen)

Thanks also for the money.

This survey was very good and easy to answer.

I found the question very nice and also appropriately long for the reward.

Thank you too. I liked the questions, they weren't too difficult, I understood them and the main thing is that I enjoyed it. Thank you very much and see you in the next survey!

It was a great and interesting survey. I really enjoyed it and would like to have more of it. The length of the survey and the duration were just right. You could keep up very well and understand the questions very well.The answer options were also very understandable and the layout was just as good.

Everything is great. Good questions. Next time maybe 2 minutes or so shorter. Otherwise I can't complain.

Excellent Survey!

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Interesting 2024 Trends

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Understanding
Gen Z in Germany 2024

- What does Gen Z value?
- How can we authentically connect with Gen Z?

We ran a survey in Germany to get answers to these questions.

- Technology and Digital Connectivity
- Social and Political Awareness
- Economic Factors
- Consumer Behavior
- Leisure and Entertainment
- Environmental Consciousness
- Expectations and Outlook
- Communication Styles
- Identity and Diversity
- Social Relationships

Technology and Digital Connectivity

Always Mobile First

Phone usage is on the rise across all generations, making **mobile-first experiences** a must not only for Gen Z but for other generations as well.

Where Gen Z spends time

Social media metrics are key for spotting trends, and in 2024, **TikTok's popularity** continues to rise, making it a platform to watch closely.

Spend more than 5 hours a day on their phone

Gen Z: 55%	Other: 20%
▲ 18%	▲ 8%

Use Tik Tok on a daily basis

Gen Z: 86%	Other: 57%
▲ 28%	▲ 30%

Use Instagram on a daily basis

Gen Z: 82%	Other: 54%
▼ 4%	▲ 13%

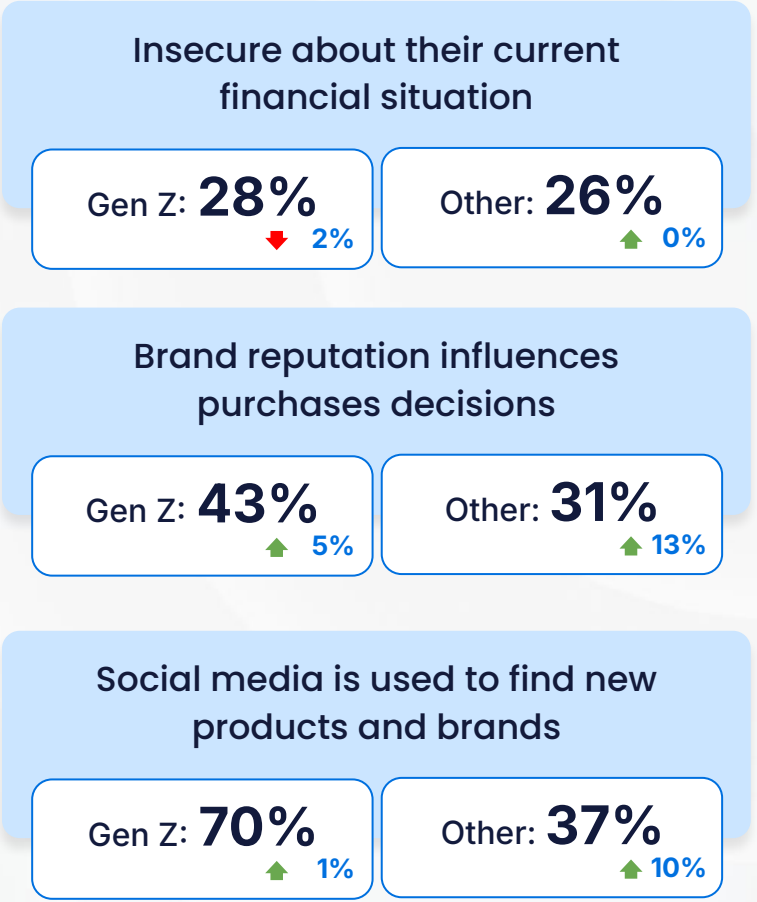
Economic Factors and Consumer Behaviour

Financial Insecurity

About a third of Gen Z remains insecure about their current financial situation, showing little change from 2023.

Brand awareness and social media

Brand reputation is becoming increasingly important in Gen Z's purchasing decisions, and they are turning to social media more than ever to discover new products and brands.



Communication

Auf Wiedersehn emails

Email is becoming less and less used as the primary communication channel in private life, with social media and messaging platforms taking its place for more immediate and engaging interactions.

Brand awareness and social media

Brand reputation is becoming increasingly important in Gen Z's purchasing decisions, and they are turning to social media more than ever to discover new products and brands.

Use email as one of the main communication channels

Gen Z: **8%** ↓ 1%

Other: **14%** ↑ 0%

Communicate several times an hour via preferred channels

Gen Z: **40%** ↑ 4%

Other: **25%** ↑ 8%

Values communication skills in a romantic partner

Gen Z: **64%** ↓ 8%

Other: **54%** ↓ 12%

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