



# **MAKE OPINION**

**Create Surveys. Reach People. Understand Results**



## Z世代のリアル： アンケート習慣と 世界のトレンド

- Z世代の 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**



## Gen Z in Japan 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The perception of Gen Z as simply "**young people**" is quickly becoming outdated.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 Japan  
population

**75%+** GenZ are  
active consumers

**8-10%** of voters in  
Japan

2025: expected **27%**  
of workforce

**Riri - Please update numbers**

# Survey Engagement



## 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**

# Gen Z general attitudes tracker

## *Japan, Germany, United States*

### September 2025

#### Traditional Tracker

**150**

Gen Z

**150**

Other Generations

#### 44 Questions

**18 min**

estimated length of interview

**10%**

estimated drop rate

# Gen Z

## as survey takers

With the 2025 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 2025

- 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

JP: X%

DE: X%

US: X%

See cash / PayPal transfers as the  
ideal incentive

JP: X%

DE: X%

US: X%

Incentives value for: JP / DE / US

1. Fair and worthwhile:

X%

X%

X%

2. OK, can be improved:

X%

X%

X%

3. Value too low:

X%

X%

X%

# 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

JP: X%

DE: X%

US: X%

Questions in surveys are easy to understand most of the time

JP: X%

DE: X%

US: X%

Consider a 44 questions survey as "good length"

JP: X%

DE: X%

US: X%

# 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

## 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.

Webcam Acceptance Rate: **<5%**

Price: **High**

Richer, more in depth answers

# 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**.

# Gen Z and Older Gen

## Users Comments (Thank you Screen)

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.

This survey was very good and easy to answer.

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!

Thanks also for the money.

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

Excellent Survey!

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

**Riri - Please update with some**

# Interesting 2024 Trends

# 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

JP: X%

DE: X%

US: X%

Use Tik Tok on a daily basis

JP: X%

DE: X%

US: X%

Use Instagram on a daily basis

JP: X%

DE: X%

US: X%

# Economic Factors and Consumer Behaviour

## Financial Insecurity

About a third of Gen Z remains insecure about their current financial situation, showing little change from 2024.

## 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.

Insecure about their current financial situation

JP: X%

DE: X%

US: X%

Brand reputation influences purchases decisions

JP: X%

DE: X%

US: X%

Social media is used to find new products and brands

JP: X%

DE: X%

US: X%

# 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

JP: X%

DE: X%

US: X%

Communicate several times an hour via preferred channels

JP: X%

DE: X%

US: X%

Values communication skills in a romantic partner

JP: X%

DE: X%

US: X%



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