



Partnering for Success

It's a Great Day for **Discovering Why**

SPEAKERS



Dan Coates
President - YPULSE

Jim Whaley
CEO - OvationMR



What You Will Learn



•Manage and deliver over half a million completed interviews among hard-to-reach populations



Understand How Youth Across N. America, W. Europe and APAC Differ



Breakthrough with Gen Z



Understand Brand Attributes Drive Engagement and Loyalty

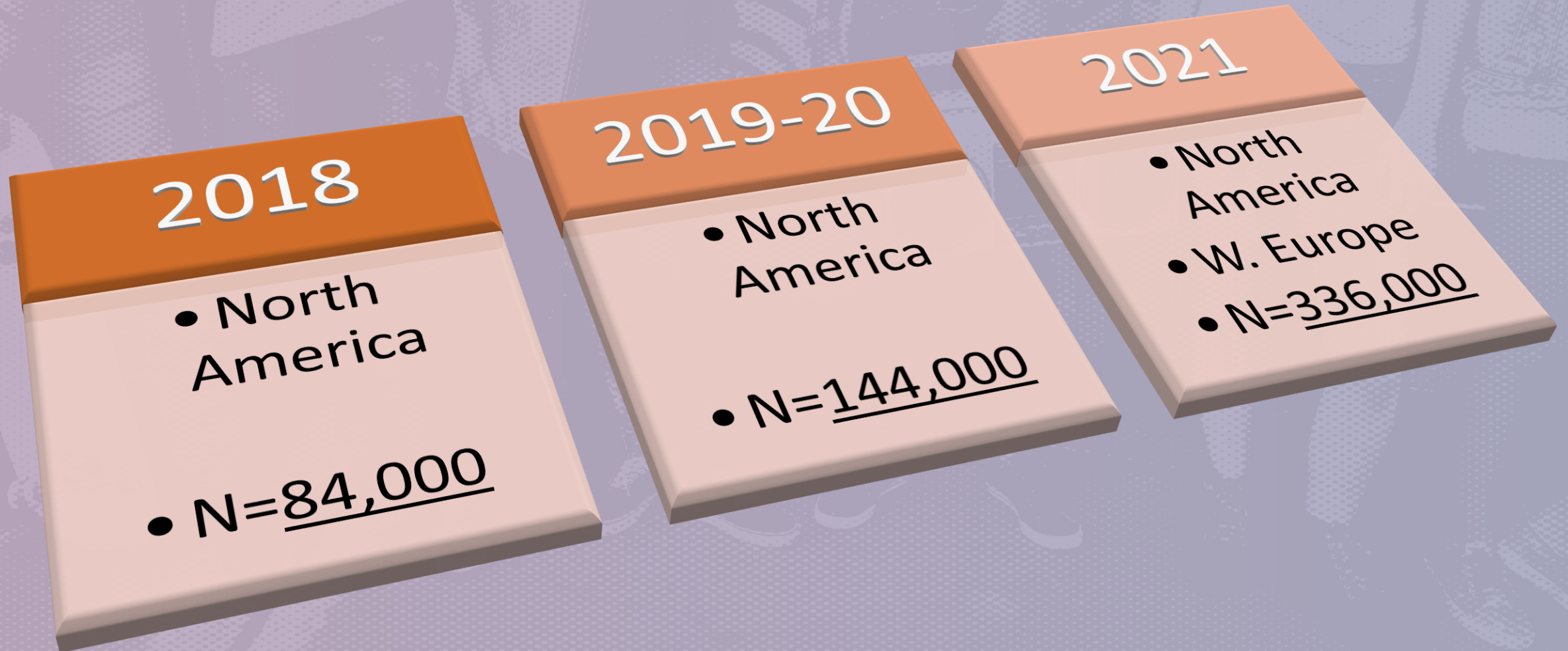
Our mission is to expand opportunities for researchers, to do the work they believe in and can stand behind, for their company, their community and their cause.

We deliver real
insight-rich data at
the best value in
the marketplace.

Its Simple.



Early Roll-Out Progression – Year 1 thru 4



Current Year + Beyond

2022

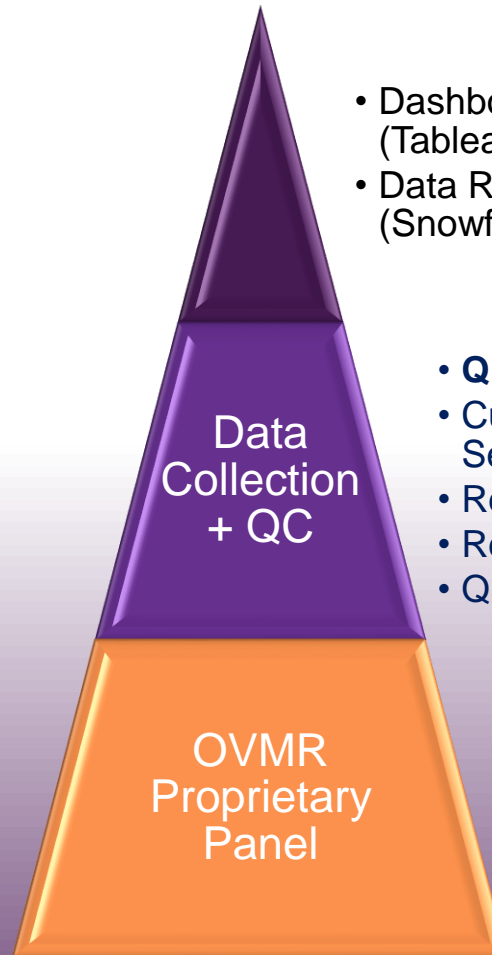
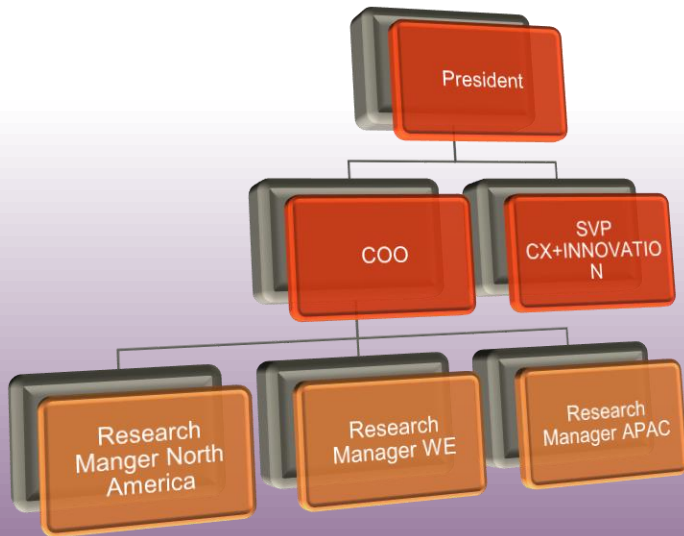
- North America
- Western Europe
- APAC

• N=515,000

2023/24

- North America
- W. Europe
- APAC
- North & Cent. Europe
- LATAM
- MENA

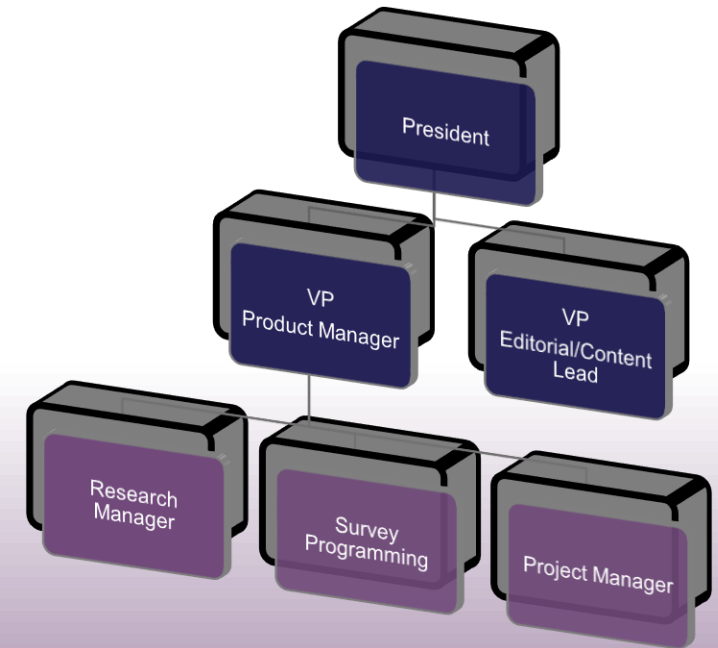
Partnership Lens View – Organization Support and Tech Stack



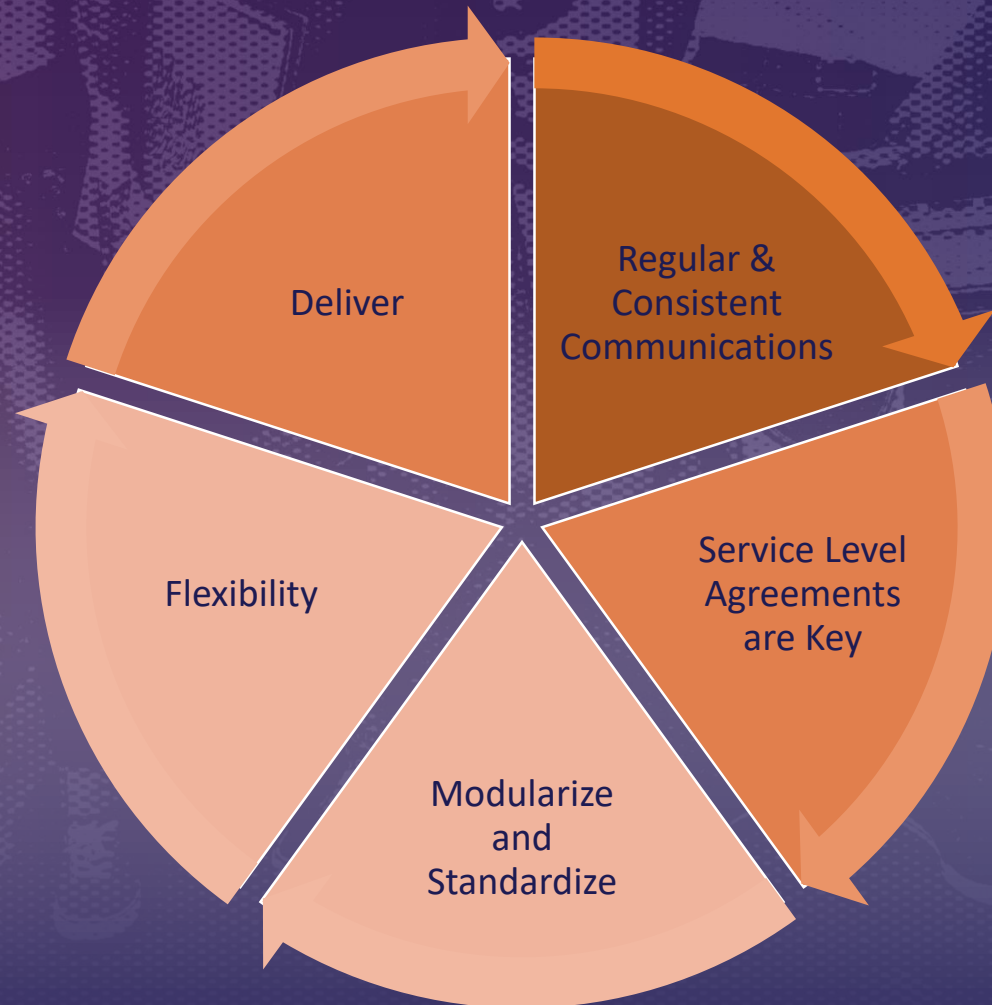
- Dashboards (Tableau®)
- Data Repository (Snowflake®)

- **Qualtrics®**
- Custom Module Selector Call
- RelevantID®
- RealAnswer®
- QualityScore®

- **Sample Ninja®**
- Legacy
- Custom Blended API Supply



Partnership Key Success Factors





THE AUTHORITY ON GEN Z AND MILLENNIALS

Daily insight articles
and curated news

Weekly behavioral reports

Monthly trend reports
and webinars

Continuous brand tracking
(1000+ brands)

500,000 annual interviews
(A13-39)

Seven countries, growing
to thirteen in 2022

GEN Z PROFILE

STATUS:

The new culture creators

AGE IN 2022:

7-25-years-old

POPULATION SIZE:

130 million | North America

150 million | Western Europe

2.4 billion | Worldwide

ANNUAL SPENDING POWER:

\$412 billion | North America

\$351 billion | Western Europe

DIFFERENTIATORS:

Diverse

Digitally-first lifestyle

Coming of age during crises



1

**Millennials were
raised in a boom,
Gen Z in a
recession.**

52%

of Gen Z teens don't remember a
time before the Great Recession
vs 32% of Millennials

2

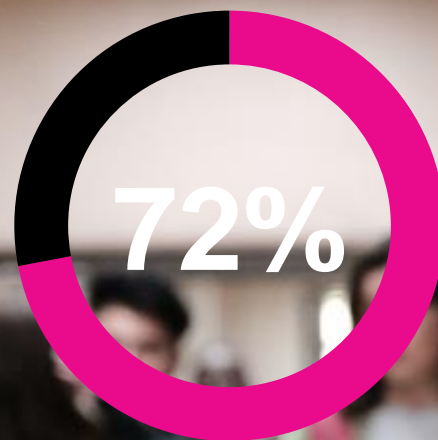
**Gen Z is more
anxious than any
previous generation**

84%

of Gen Z feels anxious
about the future
vs 74% of Millennials

3

Millennials are inclusive— Gen Z is the diversity tipping point



Gen Z think more
TV shows / movies should star
non-White actors / actresses
vs 63% Millennials

72%

They are the most diverse generation in history*

GEN Z 50%
GEN X 60%
SILENT 78%
MILLENNIAL 55%
BOOMER 72%

BIPOC

WHITE

4

**Gen Z is
challenging
definitions around
gender and
sexuality**

27%

of Gen Z identify as LGBTQ+
vs 19% of Millennials

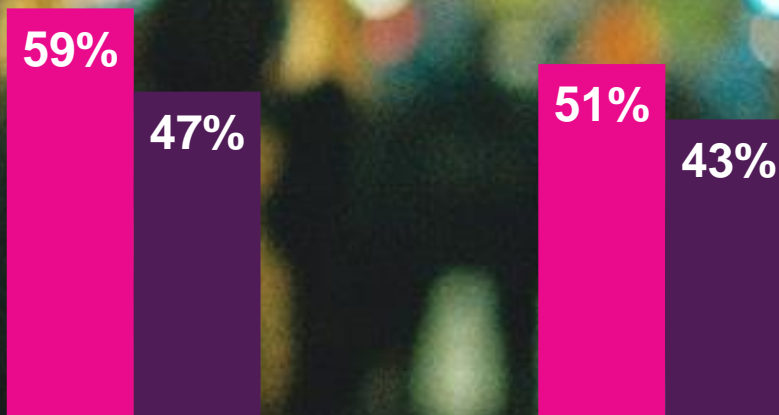


5

They both want to make a difference, but Gen Z thinks their generation needs to speak up

Who has a responsibility to speak out on important issues?

● Gen Z ● Millennials



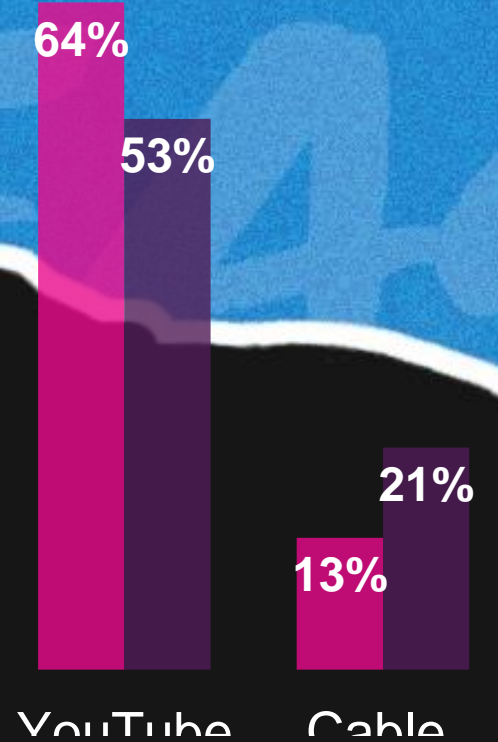
My Generation / Peers

Brands

6

GEN Z MILLENNIAL

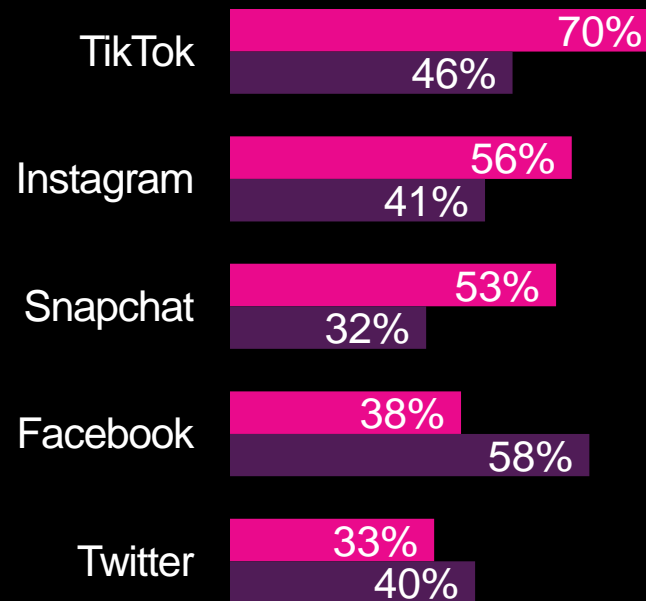
Millennials cut the cord first, but Gen Z was raised on YouTube



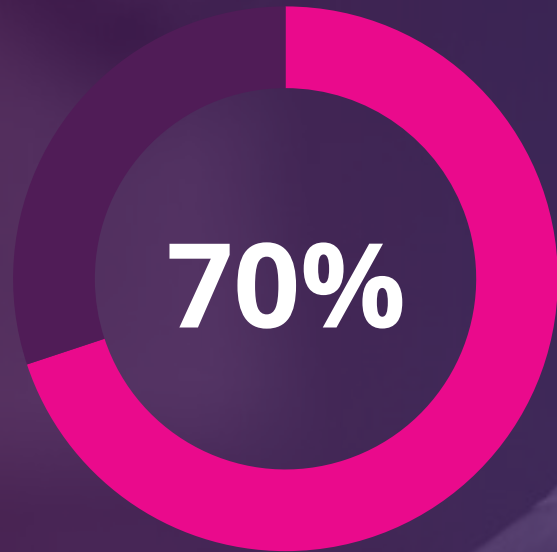
7

Millennials started social media, Gen Z is fueling the popularity of next gen platforms

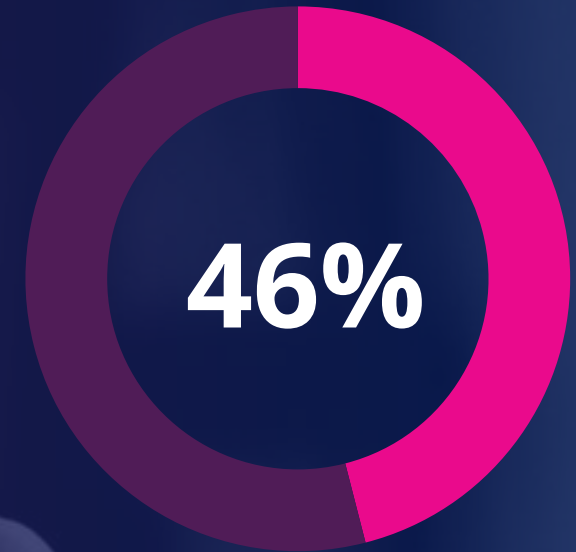
GEN Z MILLENNIAL



And making TikTok their go-to app.



of Gen Zs are
currently on TikTok
+58 since Feb 2019



of Millennials are
currently on TikTok
+43 since Feb 2019

8

Millennials watched the first online creators, but Gen Z is under the influencer effect



60%

of Gen Z follow online celebrities/creators on social media
vs 42% of Millennials

9

**Millennials grew up gaming,
but Gen Z is growing up
in the metaverse**

**How many play a virtual
world game?**

88%
GEN Z

70%
MILLENNIALS



10

**They value
different
brands**

North America

| GEN Z | MILLENNIALS |
|----------------------|----------------|
| YouTube | PayPal |
| Nike | Amazon |
| Amazon | Nike |
| TikTok | Dove |
| Netflix | Netflix |
| PayPal | YouTube |
| Quizlet | The Home Depot |
| Apple | Google |
| Dove | Apple |
| Bath & Body Works | NBA |



10

**They value
different
brands**

Western Europe

| GEN Z | MILLENNIALS |
|------------------|-------------|
| Netflix | PayPal |
| PayPal | Netflix |
| YouTube | Amazon |
| Nike | Nivea |
| Apple | IKEA |
| Google Classroom | Nike |
| IKEA | Kinder |
| Kahoot! | YouTube |
| TikTok | VTech |
| Amazon | Adidas |

10

**They value
different
brands**

Asia Pacific

| GEN Z | MILLENNIALS |
|------------|-------------|
| Nike | Nike |
| Adidas | Adidas |
| Gucci | Apple |
| Apple | Uniqlo |
| McDonald's | Samsung |
| Uniqlo | McDonald's |
| CHANEL | H&M |
| Puma | CHANEL |
| H&M | Puma |
| Coca-Cola | Gucci |

**The top retail apps that
Gen Z is using**

**What social causes are
Gen Z passionate about**

**Here are Gen Z's
top 10 brands**

**The skills Gen Z wishes
they learned in school**

**5 Gen Z fashion trends
expected to take off**

**Here's what Gen
Z is buying in
the Metaverse**

**Why Gen Z is
more likely to
identify
as LGBTQ+**

**How college
athletes became
marketing
mainstays**

**These toy trends
will take over
2022**

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