Methodology

RESPONDENT MAKEUP

PHASE 1: QUALITATIVE EXPLORATION
Global community: 3-day online community, a mix of written, video and creative tasks, 18 Gen Z respondents
6 markets: Germany, Mexico, India, Nigeria, Singapore and USA

PHASE 2: QUANTITATIVE SURVEY
10-minute survey, 12 markets: 1338 Gen Z respondents, 747 Millennial / Gen X respondents

<table>
<thead>
<tr>
<th>GENDER</th>
<th>Gen Z</th>
<th>Millennials+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>49%</td>
<td>59%</td>
</tr>
<tr>
<td>Female</td>
<td>51%</td>
<td>41%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>AGE</th>
<th>Gen Z</th>
<th>Millennials+</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>100%</td>
<td>N/A</td>
</tr>
<tr>
<td>25-34</td>
<td>N/A</td>
<td>39%</td>
</tr>
<tr>
<td>35-54</td>
<td>N/A</td>
<td>61%</td>
</tr>
</tbody>
</table>

PHASE 3: BBC’S SCIENCE OF ENGAGEMENT STUDY
BBC Science of Engagement biometric and subconscious measurements.
Sample size of n=4674 ages 18-24 and n=3779 ages 25+ population.
14 markets: Argentina, Australia, Brazil, Canada, France, Germany, Italy, India, Mexico, Netherlands, Singapore, South Africa, Spain and United States.

COUNTRIES IN QUANTITATIVE STUDY
12 markets: USA, Canada, Australia, Singapore, India, South Africa, France, Germany, Netherlands, Mexico, Nigeria, China

Mentions of Millennials+ in this report includes respondents ages 25-54
what makes Gen Z different?

1. Different set of aspirations
2. Emotionally engaged
3. Driven
4. Success = authenticity
5. Authenticity = honesty, originality, trust, facts & quality
Deeper emotional engagement

SCIENCE OF ENGAGEMENT CONTENT TESTING

Hyundai – Journey to Ithaca

Source: BBC Gen Z Thought-leadership Study “Brands, News & Gen Z,” April 2022. Sample size of n=2,104 across Gen Z and Millennial+ generations in USA, Canada, Australia, Singapore, India, South Africa, France, Germany, Netherlands, Mexico, Nigeria, China. BBC Science of Engagement biometric and subconscious measurements. Sample size of n=4674 ages 18-24 and n=3779 ages 25+ population, across Argentina, Australia, Brazil, Canada, France, Germany, Italy, India, Mexico, Netherlands, Singapore, South Africa, Spain and United States.
when a brand is more authentic
I am more likely to...

- trust its quality 72%
- buy their products and services again 71%
- talk about that brand in a positive way 71%
- pay more for their products and services 54%

C3. (Top 2 agree %) To what extent do you agree or disagree with the following statements? When a brand is authentic, I am more likely to... Base: Gen Z (1338)
Gen Z outperformed on brand metrics when emotionally engaged.

What does this mean for media?