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Global Trust Survey 2022

A Report On
The Level Of Trust
In Market Research
Around The Globe
September 2022



Table of Contents

Read Me: I'm Important	3
Introduction	4
Partners	5
Background and Sample	6
Key Takeaways	12
Snapshot View of: Trust in and Impressions of Market Research	14
Level of Overall Trust	16
Believability that Market Research is Beneficial	28
Reactions to the Participant Experience	41
Personal Data Use	47
Protection and Use of Personal Data	55
Drivers of Trust in Market Research to Protect and appropriately use Personal data	67
How Covid-19 Has Changed the Level of Trust	77



Read Me: I'm Important

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Introduction by Andrew Cannon, Executive Director, GRBN

“Trust is a precious thing. It is hard to build and easily lost.”

“Trust cannot be taken for granted. It needs to be earned.”

Two simple, but powerful truths I believe, but why should we, the global market research sector, care about the general public’s trust?

The general public is the lifeblood our sector relies on. Without people’s willingness to voluntarily give us their time, their opinions and access to their data, our industry is ill-equipped to meet the needs of decision-makers, who rely on the data and insights we provide to inform their decisions.

The findings from this survey tell us that the general public has a “reasonable” amount of trust in our sector. This is good, but is it good enough? Should we rest on our laurels?

I believe not. I believe that our sector has much to gain from being more trusted by the general public. Not only would this improve response rates and data quality, but also differentiate our industry from others who are also playing in the data space, both in the eyes of the general public, but also in the eyes of business decision-maker and the authorities.

I believe that trust with personal data will become more, rather than less, important in the years to come. The data from this survey shows that our industry is, in my opinion, punching below its weight on this matter. A definite opportunity for us to improve.

The GRBN is committed to playing its part in building a relationship with the general public built on trust.

The GRBN has put in place a Building Public Trust Charter to which regional and national associations across the globe, which share this commitment, have endorsed (see overleaf).

If you share our belief that we can, and should, increase the level of trust in our sector, please get in touch and let’s do something about it together.



Andrew Cannon

Executive Director, GRBN

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Background and Sample

The primary objective of the survey is to understand the level of trust the general public has in the market research industry across the globe, both overall and specifically when it comes to the handling of personal data.

The secondary objective is to understand more broadly how trust in different types of organizations and bodies compares across the globe.

Fieldwork was conducted between the 20th of July and the 10th August 2022.

The report compares the results for 2022 to the 2020 Global Trust Survey, fieldwork which was conducted between the 27th of April and the 7th of May 2020. Trended data is shown throughout the report, many times reported as the +/- in percentage point change in the 2022 data vs. 2020 data.

The LOI is less than 10 minutes and two versions of the questionnaire were administered:

- Version 1 asked respondents first about trust with personal data and has been used to report on questions relating to personal data
- Version 2 asked respondents first about overall trust and has been used to report on questions relating to overall trust, as well as the perceived benefit of market research
- Versions 1 and 2 combined were used to report on questions relating to the market research experience

The sample has been designed to be representative of the population aged 18+ in each country, split 50%/50% into two cells, with each cell balanced by quotas.

The countries covered and the sample provider responsible in each country are shown on the following page.



Background and Sample (continued)

The countries covered and the sample provider responsible in each country are shown in the table below:

Country	Fieldwork Partners	Sample Size	Weighted
Australia	Ovation Teg	1006	No
Brazil	Offerwise	503	Yes
Canada	Quest Mindshare	1001	Yes
Germany	Bilendi	1002	No
Japan	Rakuten Insight	1000	No
Korea	PMI	1004	No
UK	Opinium	1079	No
US	InnovateMR + Rakuten Insight	1001	Yes

Fieldwork Management, programming and data processing: InnovateMR
Reporting: RTi Research

KEY TAKEAWAYS





Key Takeaways from the Research

- ✓ Trust in market research companies is still average relative to the other types of organizations analyzed.
- ✓ However, market research continues to be considered more trustworthy compared to data analytics or election and opinion polling companies.
- ✓ Consumers can clearly see the benefits of market research to businesses, but there is still an opportunity to enhance the perception it benefits the individual.
- ✓ There are still concerns on survey length, but enjoyment levels of the survey experience are mostly consistent from wave to wave.
- ✓ There are high levels of distrust in how industries, including market research, protect and appropriately use personal data.
- ✓ Consumers are still highly concerned about the misuse of their personal data.
- ✓ Just under one-in-three feel that the use of their personal data by market research companies is appropriate.





Key Changes 2022 vs 2022 (1/2)

- ✓ **Overall Trust** levels are mostly similar, but on a net basis, overall trust is somewhat down in Australia, Japan, Korea, and the US, but up in Brazil, Germany, and the UK.
 - ✓ Note that trust in government is much lower in 2022 than in 2020 and net trust in government has turned negative. Trust in the health authorities and the police is also down
 - ✓ Trust in market research is mostly consistent or slightly up vs 2020, except for Japan, where trust in market research has dropped significantly.
 - ✓ Despite still having net negative perceptions overall, trust in data analytics companies is up compared to 2020, rising most in Germany and the UK; trust remains positive and is rising in Canada and the US, whilst is negative and decreasing in Australia and Japan.
 - ✓ Trust in election and polling dropped significantly in Australia, Japan and the UK; in contrast, trust is rising in Brazil.
- ✓ The perceived benefit of market research to oneself is down in Australia, Japan, and Korea, but perceptions are more positive now in Canada, the US, and Germany.
 - ✓ Positive sentiments around the benefits of market research to businesses are down in Japan and Korea, and while still at very high levels, they are also down in Germany.





Key Changes 2022 vs 2022 (2/2)

- ✓ Trust in protection and appropriate use of personal data is rising in Brazil and Germany and is mostly flat in other countries.
 - ✓ Note that trust in government in this matter is lower in 2022 than in 2020, whilst trust in tech-related sectors tends to be up
 - ✓ Trust of market research companies to protect and appropriately use personal data is slightly up in the US and Germany.
 - ✓ While net levels of trust in data analytics companies to protect and appropriately use personal data are still mostly negative, trust in this regard is rising in many countries, especially in Germany.
 - ✓ In Brazil and Germany, trust in election and opinion polling companies to appropriately use and protect personal data has increased.
- ✓ Covid-19 negatively impacted trust in 2020, and the impact on trust is even more discernible in 2022, especially in Australia and Korea.
 - ✓ Net trust in health authorities and the government, as a result of Covid-19, has declined significantly vs. 2020.
 - ✓ Covid-19 is having an even more negative impact on election and polling companies in 2022 than in 2020. The negative impact is up in Australia, Korea, and Germany, and while still a net negative in Brazil, more now indicate they are trusting.



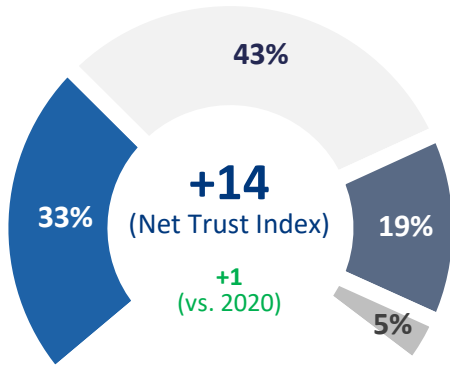
**SNAPSHOT VIEW OF:
TRUST IN AND
IMPRESSIONS OF
MARKET RESEARCH**





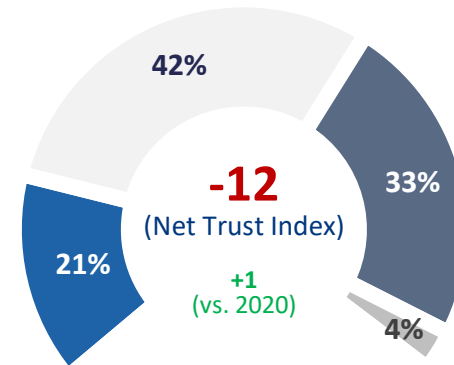
People continue to trust market research companies overall, but are less trusting when it comes to them protecting and appropriately using their personal data.

Overall Trust of Market Research Companies



Trust of Market Research Companies to Protect and Appropriately Use Personal Data

- Trust
- Not Sure
- Do Not Trust
- Don't know



Net Trust Index = % Trust – % Do Not Trust

Overall Trust Net Trust Index (NTI): Across the 15 industries/organizations analyzed, the average NTI was +14 (Market Research companies ranked 8th of 15)

Personal Data Trust Net Trust Index (NTI): Across the 15 industries/organizations analyzed, the average NTI was -12 (Market Research companies ranked 10th of 15)

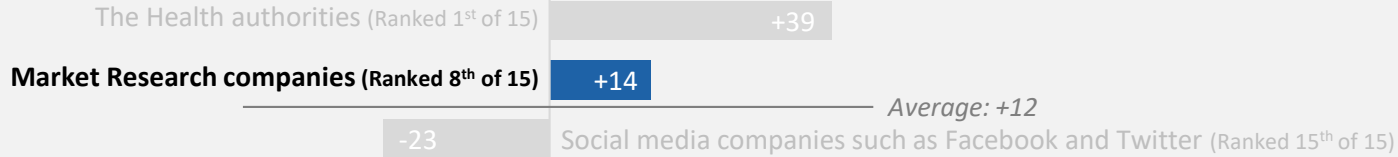
Base: Version 1 Respondents (3,844)

Base: Version 2 Respondents (3,752)

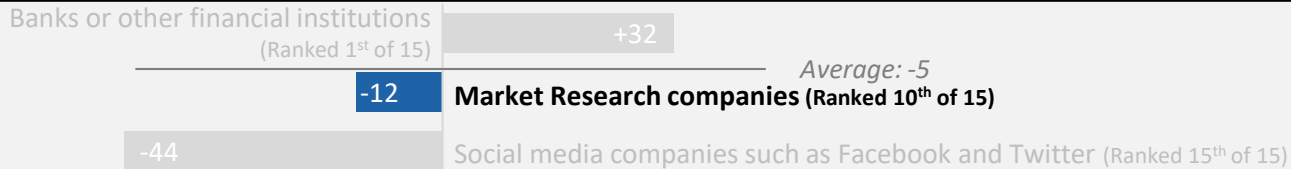


Relative to other organizations surveyed, market research companies rank in the middle of the pack on perceived trust, but rank slightly lower on usage of personal data.

Overall Trust of Market Research Companies – Net Trust Index



Trust of Market Research Companies Use of Personal Data – Net Trust Index



These findings, based on the average across the 8 countries surveyed, hide significant differences by country. Read on to find out more.



While mostly flat vs. 2020, again, only one-in-three believe market research benefits them and there is significant concern with the use/protection of their personal data, possibly at least in part due to feeling poorly informed.

29%

(-1% vs. 2020)

of consumers feel
the **use of**
personal data by
market research
companies is
appropriate

48%

(-1% vs. 2020)

of consumers are
concerned that
personal data held
by market research
companies is
securely protected

30%

(+3% vs. 2020)

of consumers feel
informed by market
research companies
about **how their**
data is collected,
stored and used

36%

(No Change vs. 2020)

of consumers
believe market
research **benefits**
them

Appropriate = 5-Completely Appropriate/4

Concerned = 5-Completely Concerned/4

Informed = 5-Completely Informed/4

Benefits = 5-Benefits Completely/4

Base: Version 1 Respondents (3,844)

Base: Version 2 Respondents (3,752)

**LEVEL OF
OVERALL TRUST**





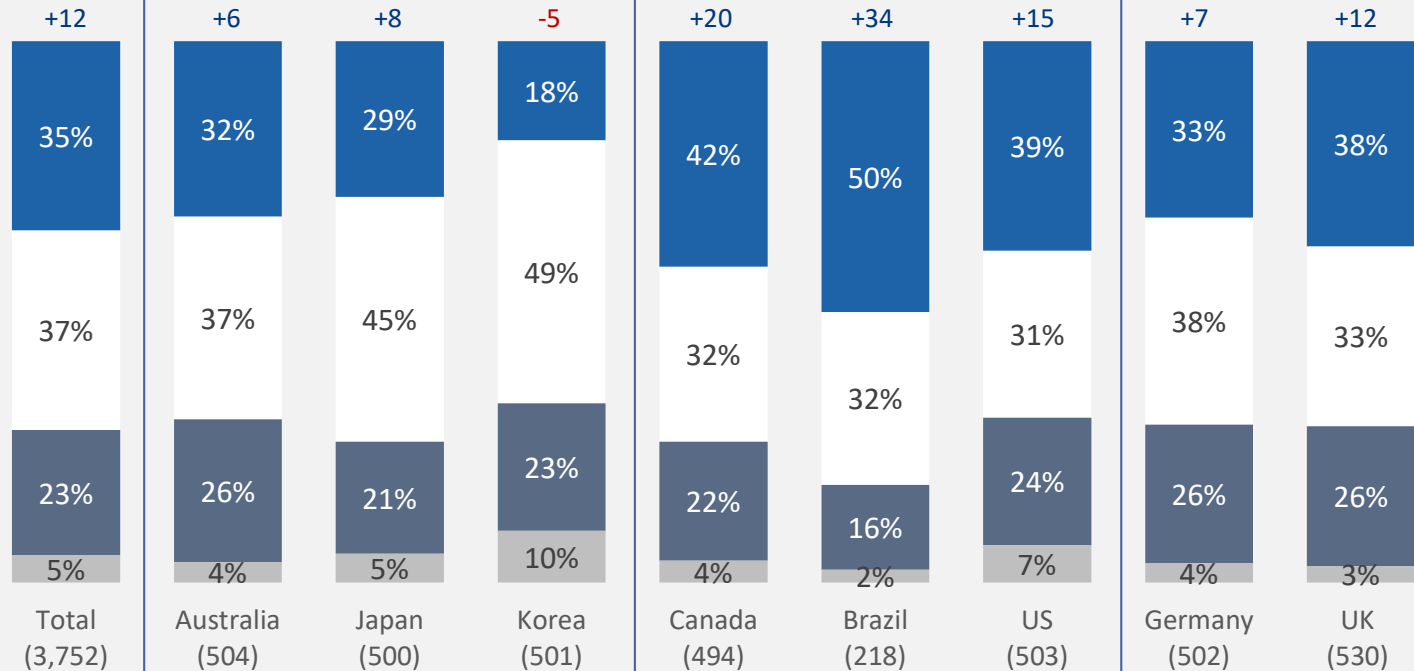
On a global basis, the general public avows trust in various organizations and professionals. However, in most countries a significant minority are less trusting.



Average Level of Trust Across Organizations/Professionals*

Net Trust Index

- Trust
- Not Sure
- Do Not Trust
- Don't Know











Net Trust Index = % Trust – % Do Not Trust

*Scores are an average across the 15 industries/organizations analyzed



Trust levels are mostly similar, but on a net basis, overall trust is somewhat down in Australia, Japan, Korea, and the US, but up in Brazil, Germany, and the UK.

Average Level of Trust Across Organizations/Professionals* - Trended to 2020

	Total								
Net Trust Index	2022 +12	+6	+8	-5	+20	+34	+15	+7	+12
	vs. 2020 --	-6	-4	-6	--	+7	-3	+4	+6
% Trust	2022 35%	32%	29%	18%	42%	50%	39%	33%	38%
	vs. 2020 +1%	-3%	-3%	-5%	+1%	+5%	-1%	+5%	+6%
% Do Not Trust	2022 23%	26%	21%	23%	22%	16%	24%	26%	26%
	vs. 2020 +1%	+3%	+1%	+1%	+2%	-2%	+1%	+1%	--

Net Trust Index = % Trust – % Do Not Trust

*Scores are an average across the 15 industries/organizations analyzed



Health, law enforcement, finance, retail and online stores continue to engender the highest levels of trust. Market research companies rank in the middle, and people are most skeptical of media and social media companies.

Note that trust in government is much lower in 2022 than in 2020, and trust in the health authorities and the police is also down

Level of Trust by Organizations/Professionals

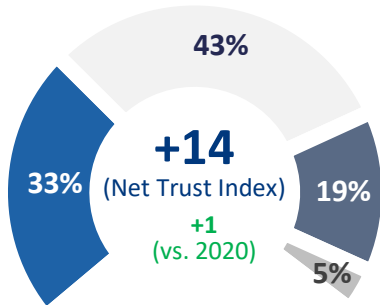


Net Trust Index = % Trust – % Do Not Trust

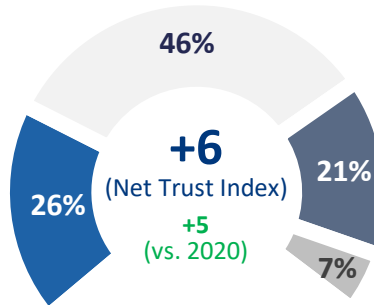


Across the “insights space,” market research companies continue to be regarded as more trustworthy.

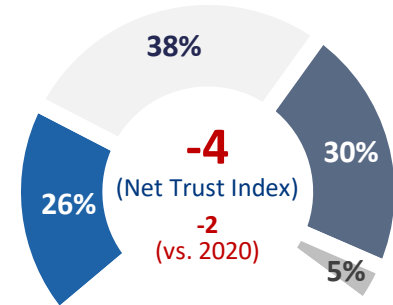
Trust in Market Research



Trust in Data Analytics



Trust in Election and Opinion Polling



- Trust
- Not Sure
- Do Not Trust
- Don't know

Net Trust Index = % Trust – % Do Not Trust



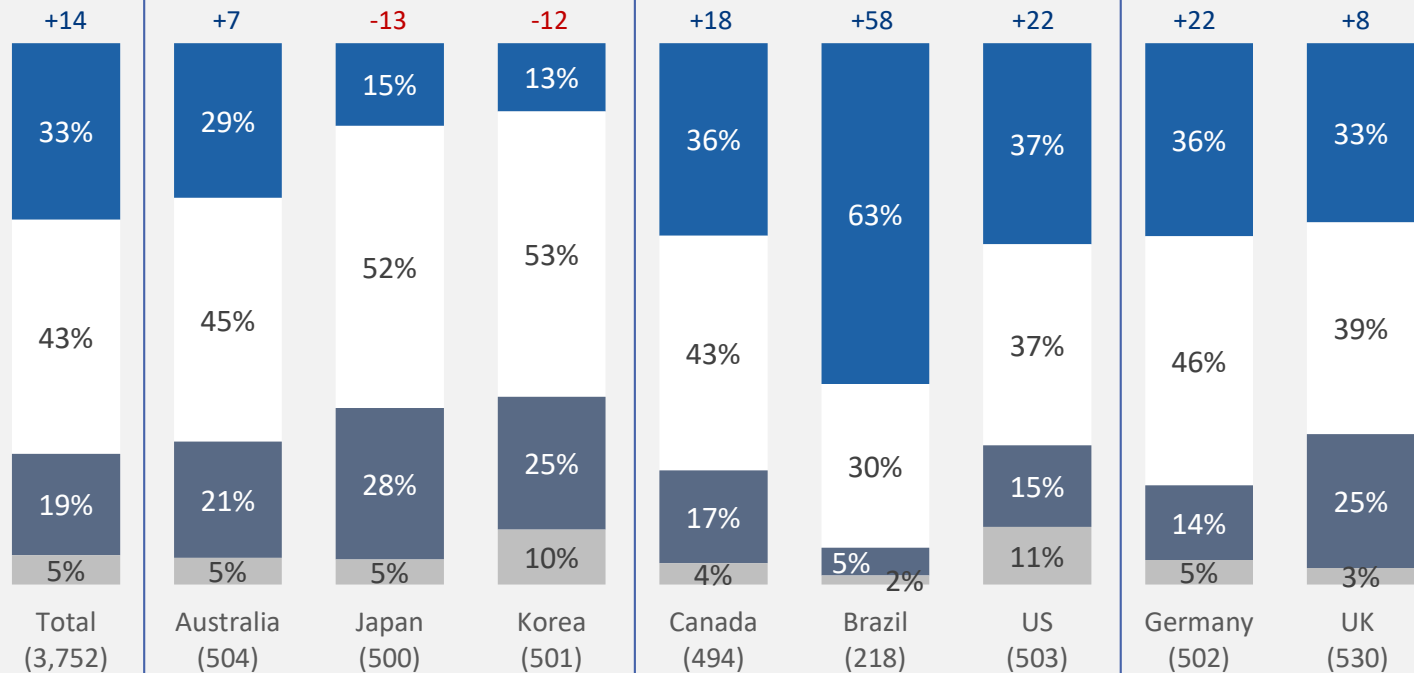
Trust in market research companies continues to vary considerably by country. While cultural bias certainly plays a part in this variation, trust in market research is strongest in Brazil, and on a net basis, positive in all countries outside of Japan and Korea.



Trust in Market Research

Net Trust Index

- Trust
- Not Sure
- Do Not Trust
- Don't Know











Net Trust Index = % Trust – % Do Not Trust



Trust in market research is mostly consistent or slightly up vs 2020, except for Japan, where trust in market research has dropped significantly.

Trust in Market Research - Trended to 2020

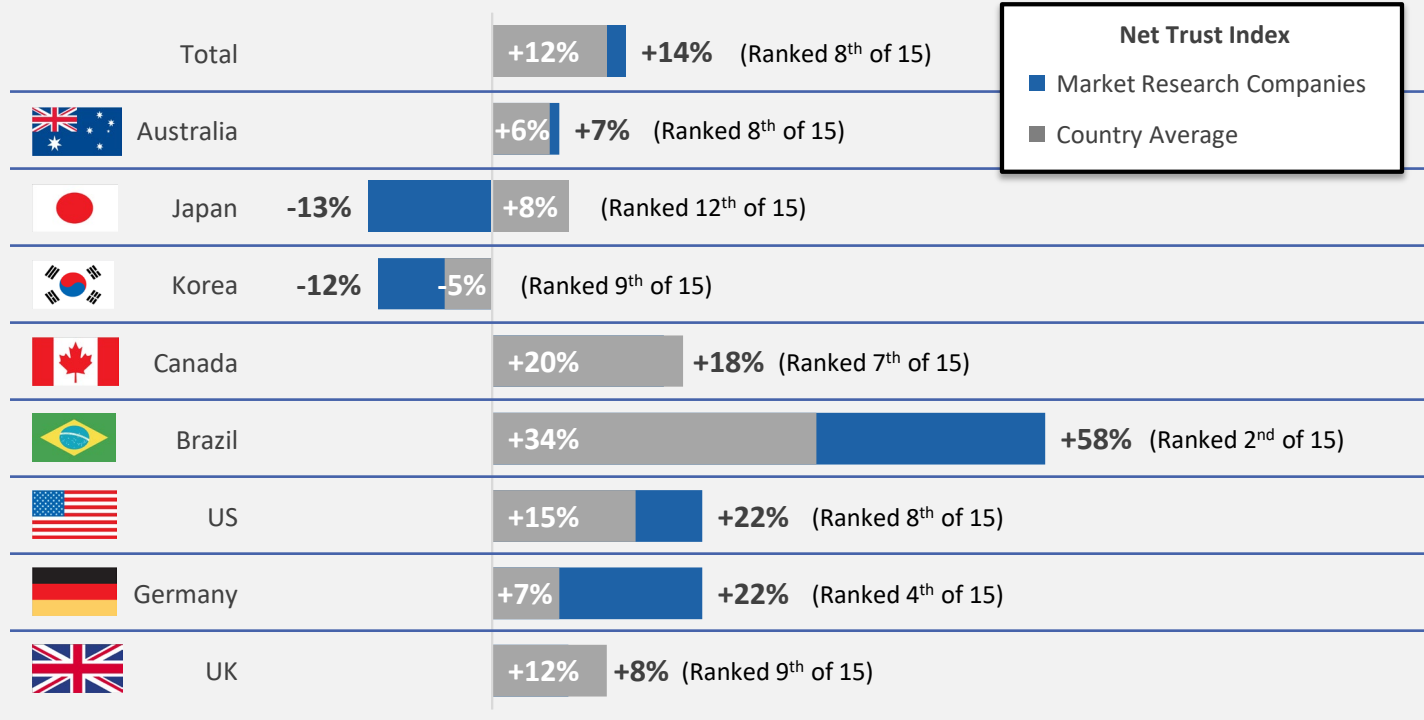
	Total								
Net Trust Index	2022 +14 vs. 2020 +1	+7	-13	-12	+18	+58	+22	+22	+8
		--	-13	+2	--	+2	+4	+5	+3
% Trust	2022 33% vs. 2020 +2%	29%	15%	13%	36%	63%	37%	36%	33%
		+2%	-6%	+1%	+4%	--	+1%	+5%	+7%
% Do Not Trust	2022 19% vs. 2020 +1%	21%	28%	25%	17%	5%	15%	14%	25%
		+1%	+7%	-1%	+3%	-2%	-3%	--	+4%

Net Trust Index = % Trust – % Do Not Trust



Trust in market research generally ranks in the middle of the pack; but stands out as more trustworthy in Brazil and less so in Japan.

Trust in Market Research (vs. Country Average)



Net Trust Index = % Trust – % Do Not Trust



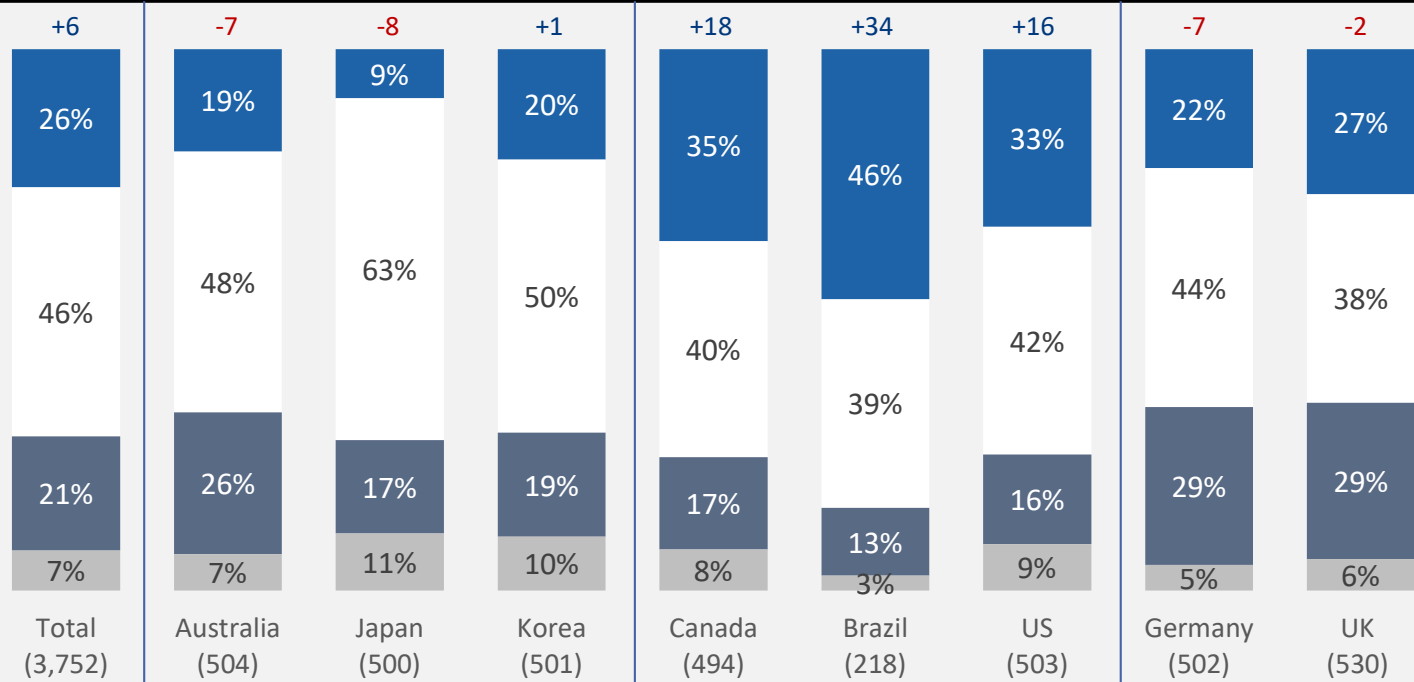
Trust of data analytics companies is lowest in Australia, Japan, and Germany; whereas those in Canada, Brazil, and the US have much more positive opinions of these companies.



Trust in Data Analytics

Net Trust Index

Trust
Not Sure
Do Not Trust
Don't Know











Net Trust Index = % Trust – % Do Not Trust



Despite still having net negative perceptions overall, trust in data analytics companies is up compared to 2020, rising most in Germany and the UK; trust remains positive and is rising in Canada and the US, whilst is negative and decreasing in Australia and Japan.

Trust in Data Analytics - Trended to 2020

	Total								
Net Trust Index	2022 +6 vs. 2020 +5	-7 -5	-8 -3	+1 +1	+18 +9	+34 +2	+16 +6	-7 +11	-2 +13
% Trust	2022 26% vs. 2020 +3%	19% -1%	9% -2%	20% --	35% +7%	46% +3%	33% +2%	22% +9%	27% +9%
% Do Not Trust	2022 21% vs. 2020 -1%	26% +4%	17% +1%	19% -1%	17% -2%	13% +2%	16% -5%	29% -2%	29% -4%

Net Trust Index = % Trust – % Do Not Trust



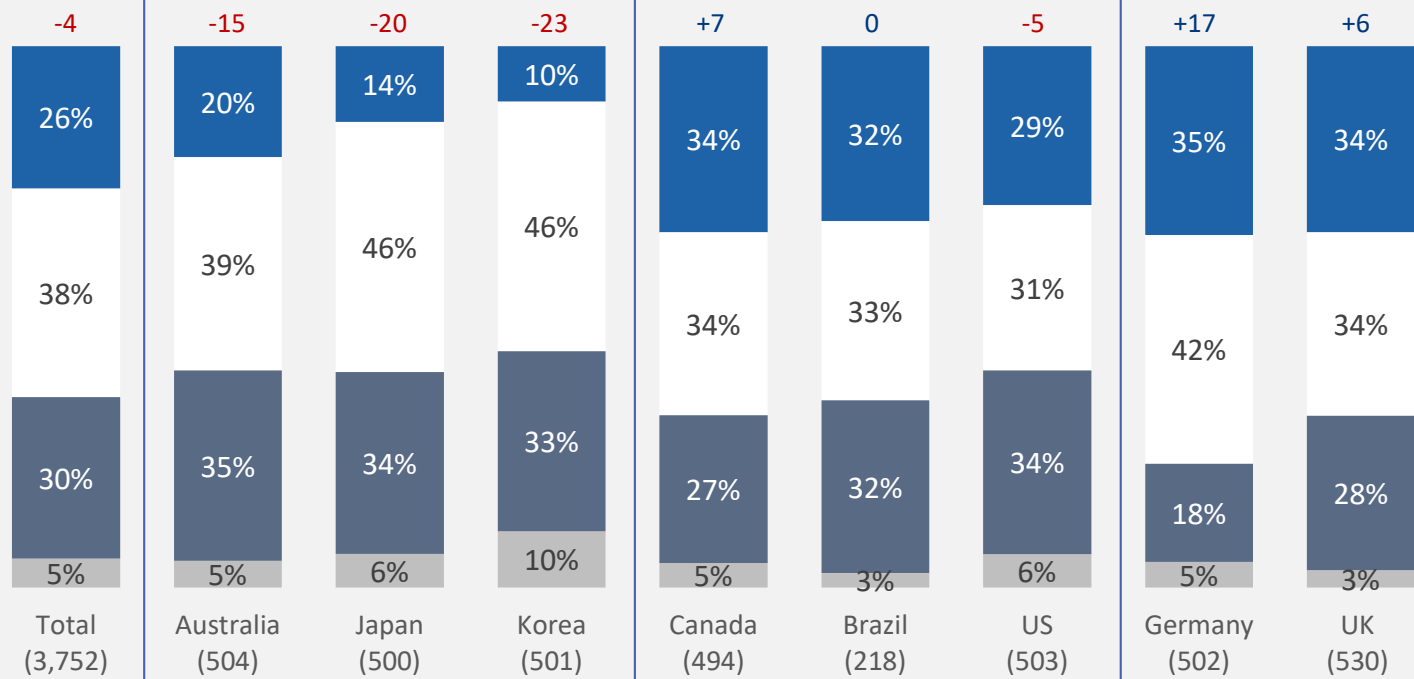
Relative to trust in other countries, on a net basis, trust in polling is strongest in Germany and weakest in APAC.



Trust in Election and Opinion Polling

Net Trust Index

Trust
Not Sure
Do Not Trust
Don't Know











Net Trust Index = % Trust – % Do Not Trust



Trust in election and polling dropped significantly in Australia, Japan and the UK; in contrast, trust is rising in Brazil.

Trust in Election and Opinion Polling - Trended to 2020

	Total								
Net Trust Index	2022 -4	-15	-20	-23	+7	--	-5	+17	+6
	vs. 2020 -2	-6	-11	--	-3	+8	+3	+1	-7
% Trust	2022 26%	20%	14%	10%	34%	32%	29%	35%	34%
	vs. 2020 --	-1%	-4%	-3%	+1%	+6%	+4%	+2%	-2%
% Do Not Trust	2022 30%	35%	34%	33%	27%	32%	34%	18%	28%
	vs. 2020 +2%	+5%	+7%	-3%	+4%	-2%	+1%	+1%	+6%

Net Trust Index = % Trust – % Do Not Trust

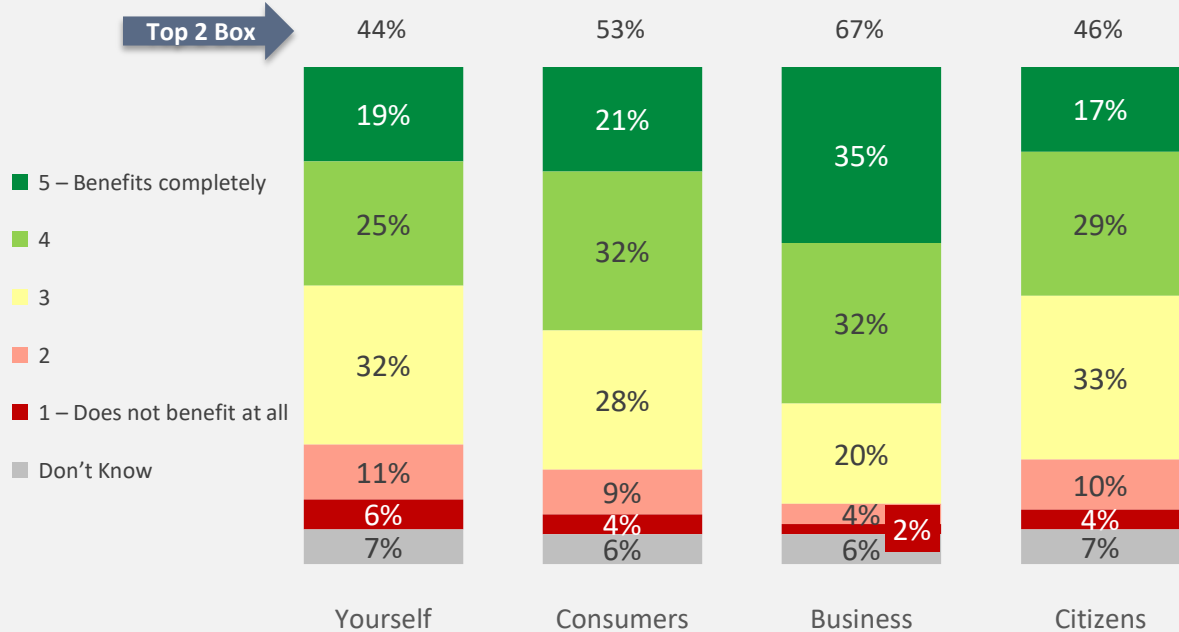
**BELIEVABILITY THAT
MARKET RESEARCH
IS BENEFICIAL**





People continue to more clearly see the benefits of market research to businesses vs. the individual.

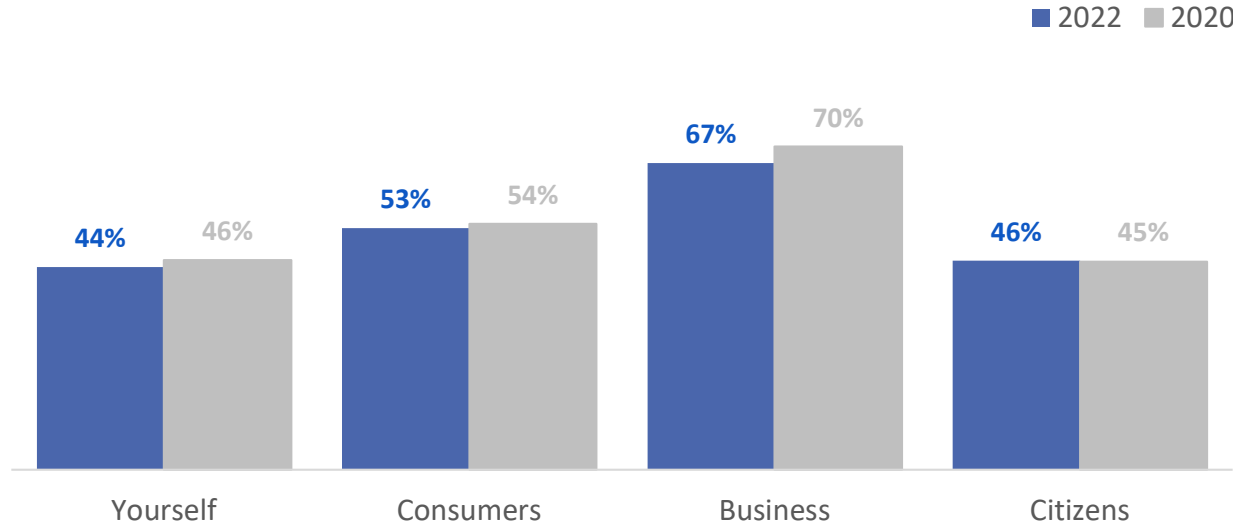
Extent Market Research is Perceived to be Beneficial





The perceived positive benefits of market research are mostly consistent from wave to wave.

Extent Market Research is Perceived to be Beneficial (Top 2 Box %) - Trended to 2020



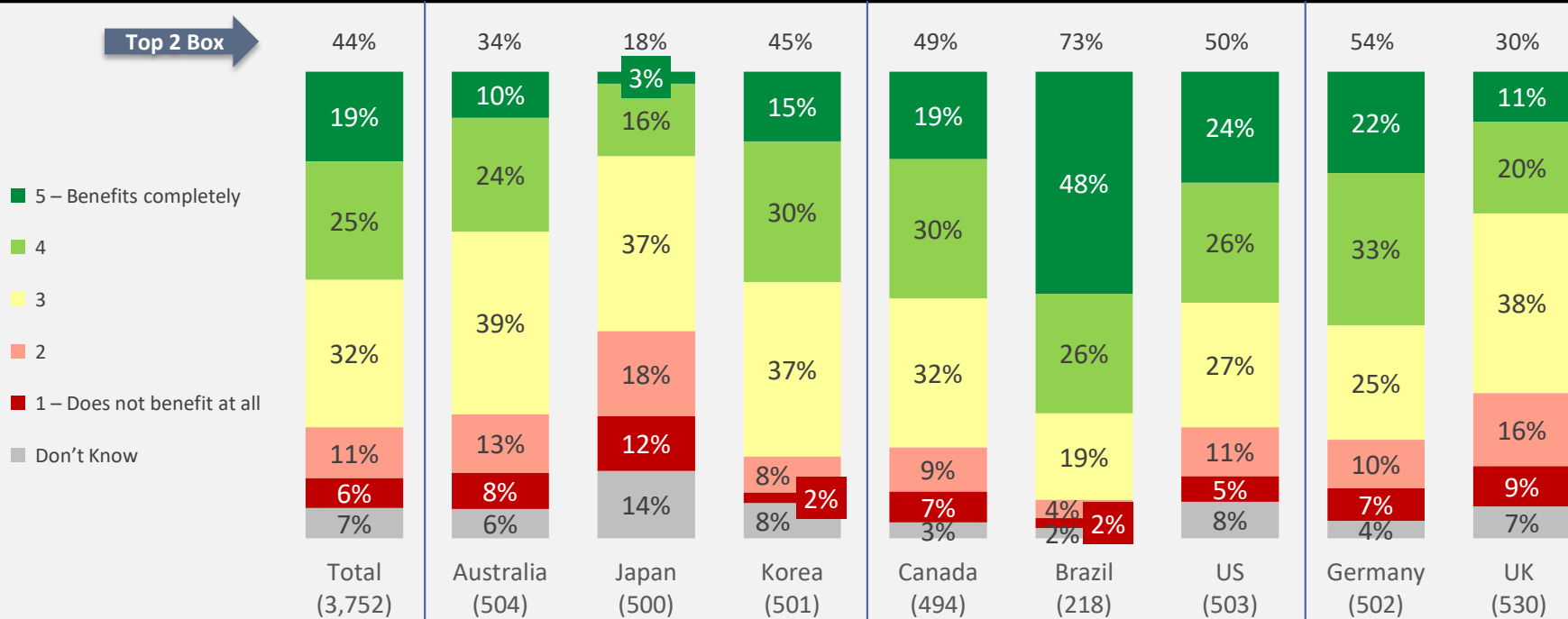


Overall, less than half feel that market research benefits them, with even fewer believing this in Australia, Japan, and the UK.



Extent Market Research is Perceived to be Beneficial to *Yourself*

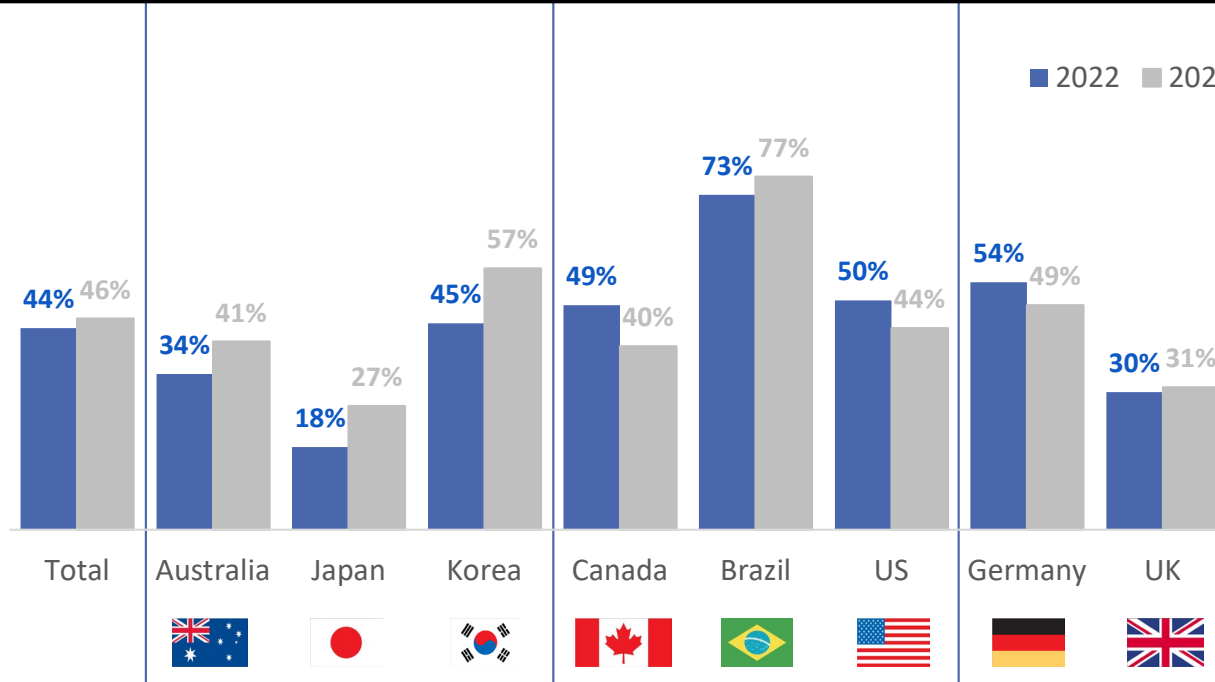
Top 2 Box





The perceived benefit of market research to oneself is down in Australia, Japan, and Korea, but perceptions are more positive now in Canada, the US, and Germany.

Extent Market Research is Perceived to be Beneficial to Yourself (Top 2 Box %) - Trended to 2020



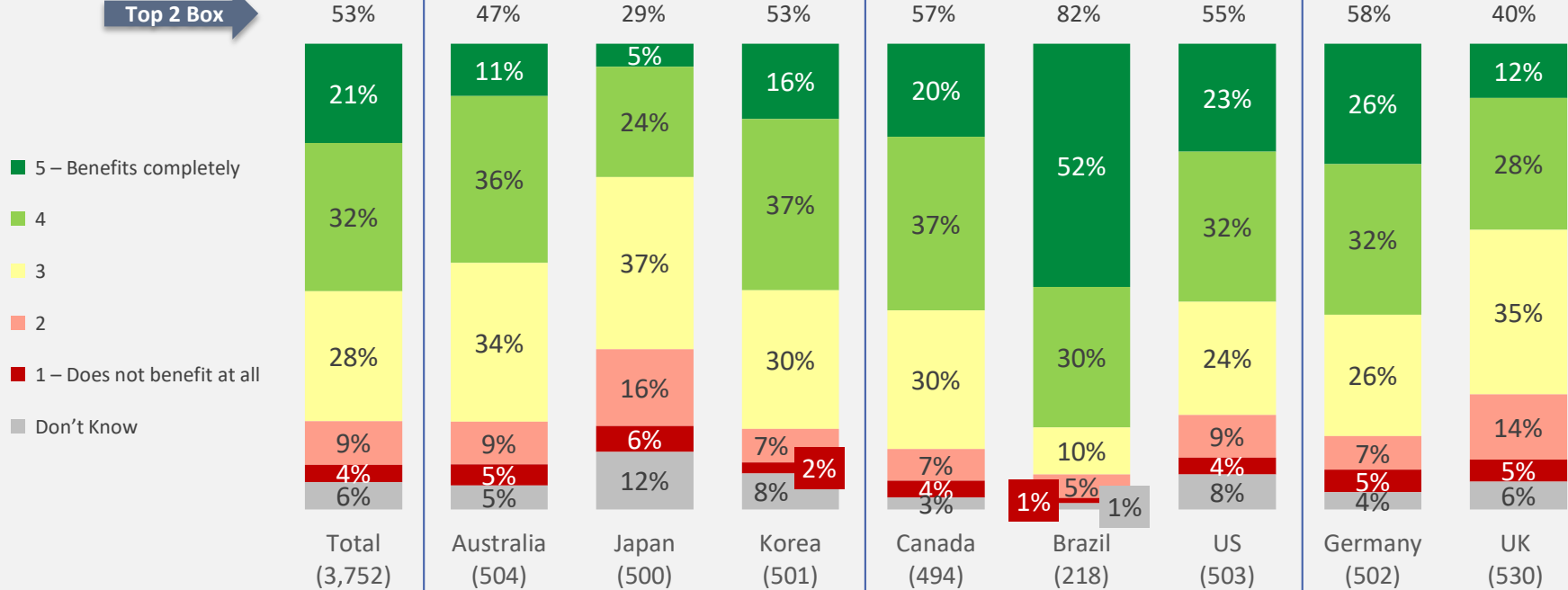


Most can see at least some level of benefit to consumers; less so in Japan and more so in Brazil.



Extent Market Research is Perceived to be Beneficial to Consumers

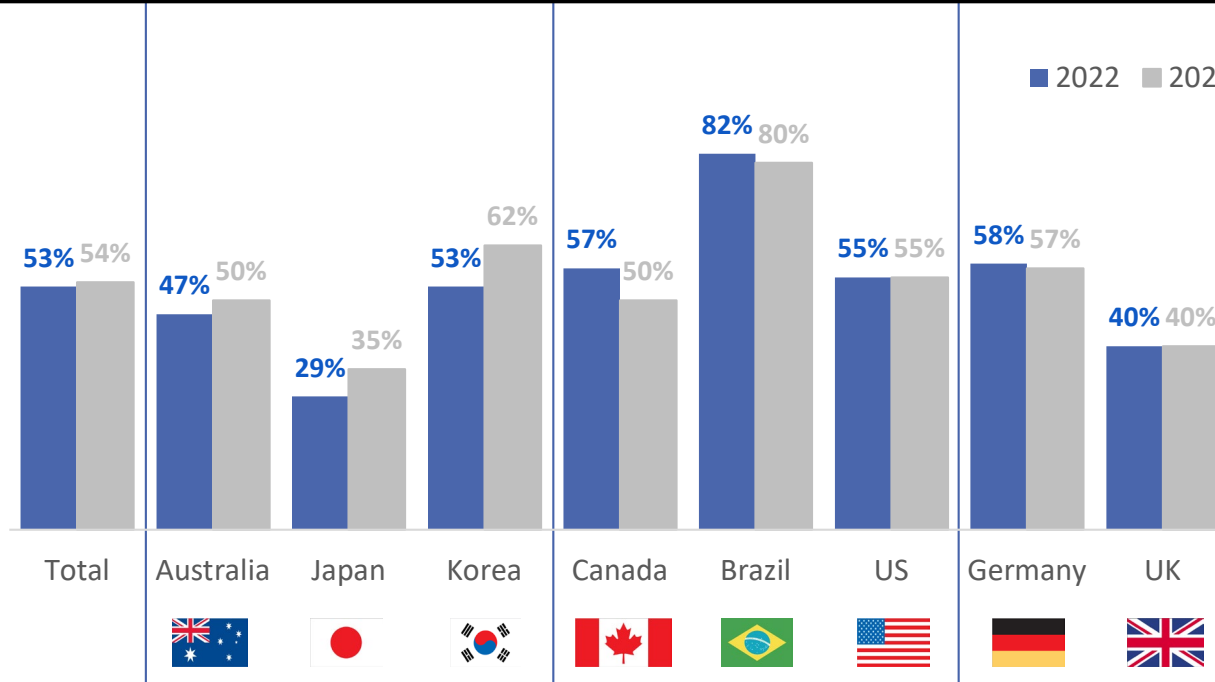
Top 2 Box





The perceived benefit of market research to consumers is also down in Japan and Korea, but again, is up in Canada.

Extent Market Research is Perceived to be Beneficial to Consumers (Top 2 Box %) - Trended to 2020



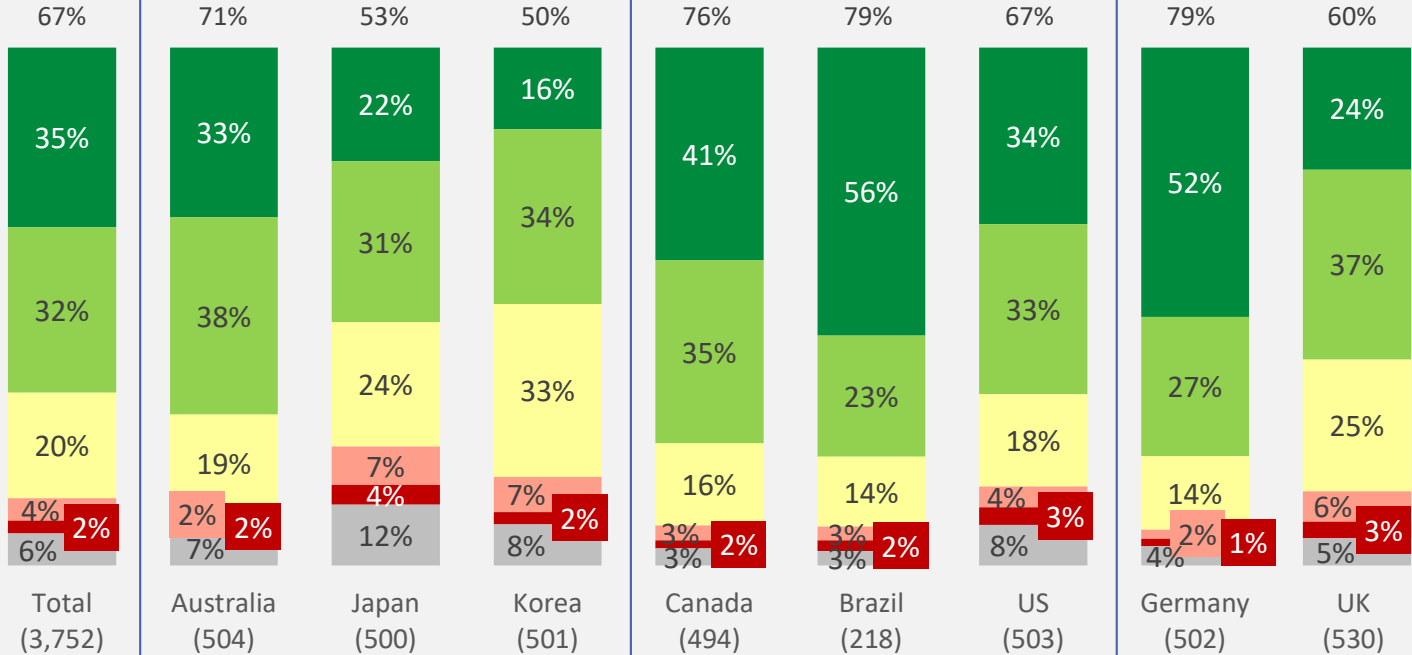


Many consider market research highly beneficial to businesses.



Extent Market Research is Perceived to be Beneficial to Business

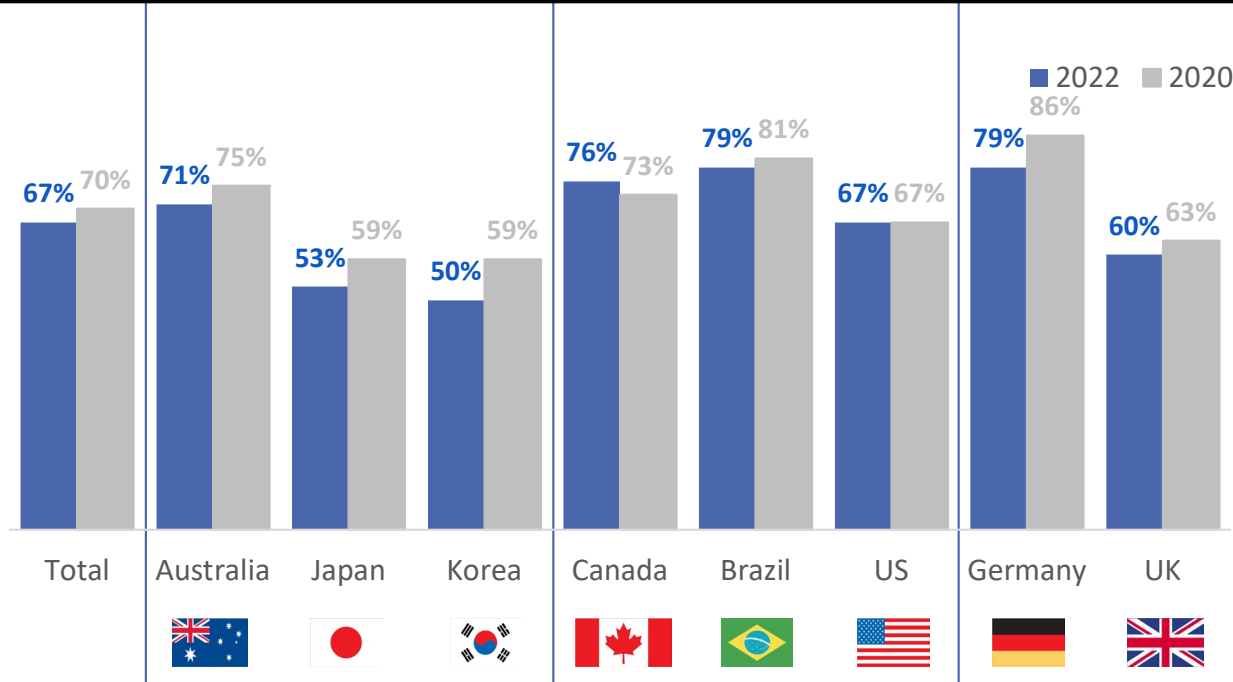
Top 2 Box





Positive sentiments around the benefits of market research to businesses are down in Japan and Korea, and while still at very high levels, they are also down in Germany.

Extent Market Research is Perceived to be Beneficial to Business (Top 2 Box %) - Trended to 2020



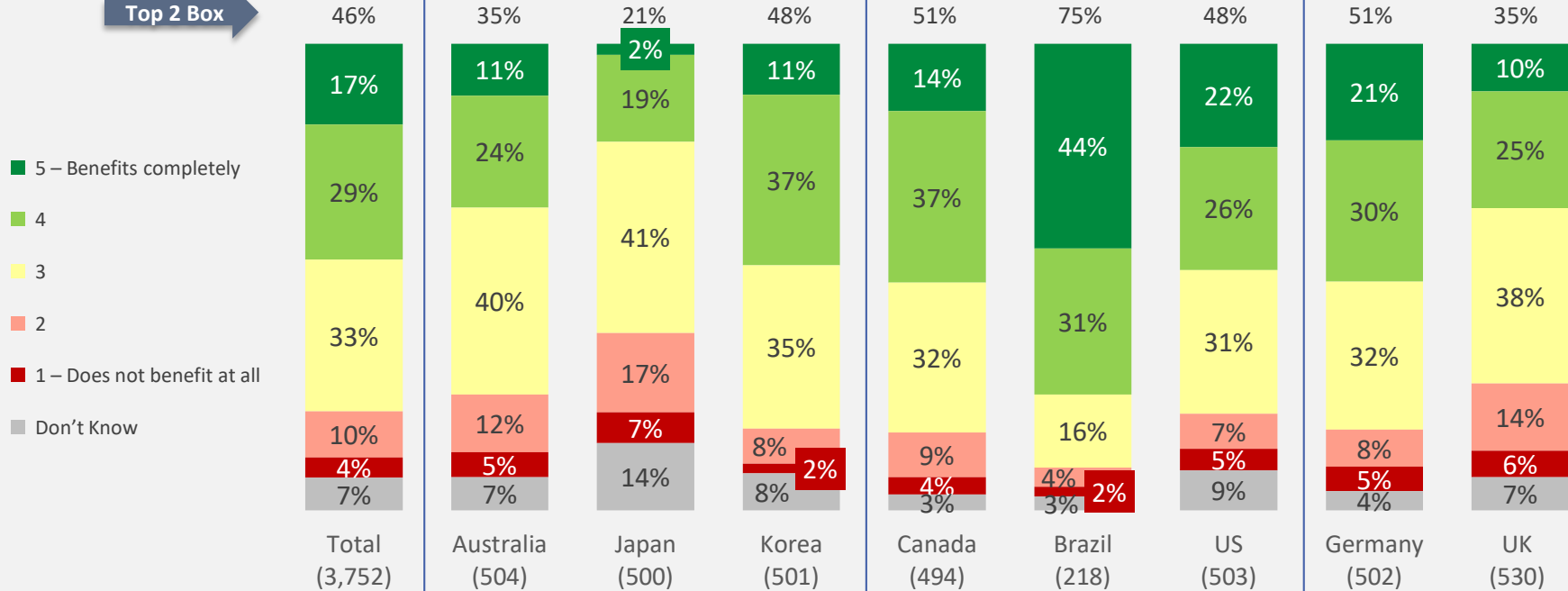


Many can see at least some level of benefit of market research to citizens; but less so in Australia, Japan, and the UK.



Extent Market Research is Perceived to be Beneficial to Citizens

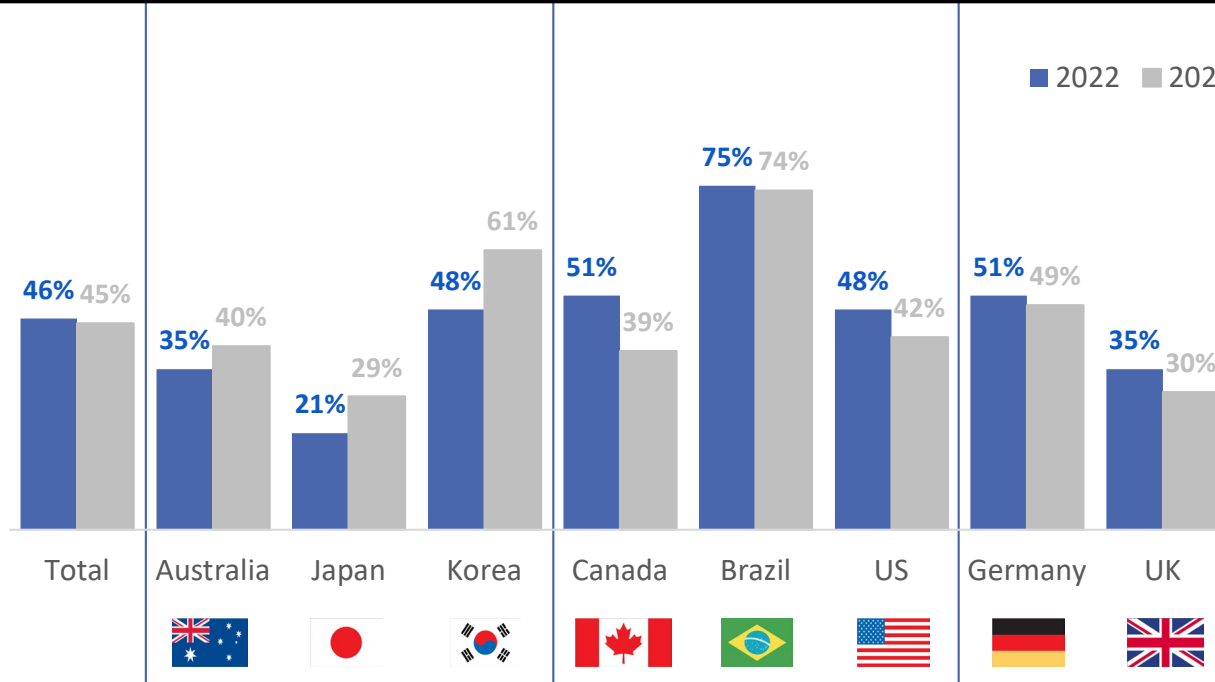
Top 2 Box





The perceived benefit of market research to citizens is down in Japan and Korea, but is up in Canada and the US.

Extent Market Research is Perceived to be Beneficial to Citizens (Top 2 Box %) - Trended to 2020

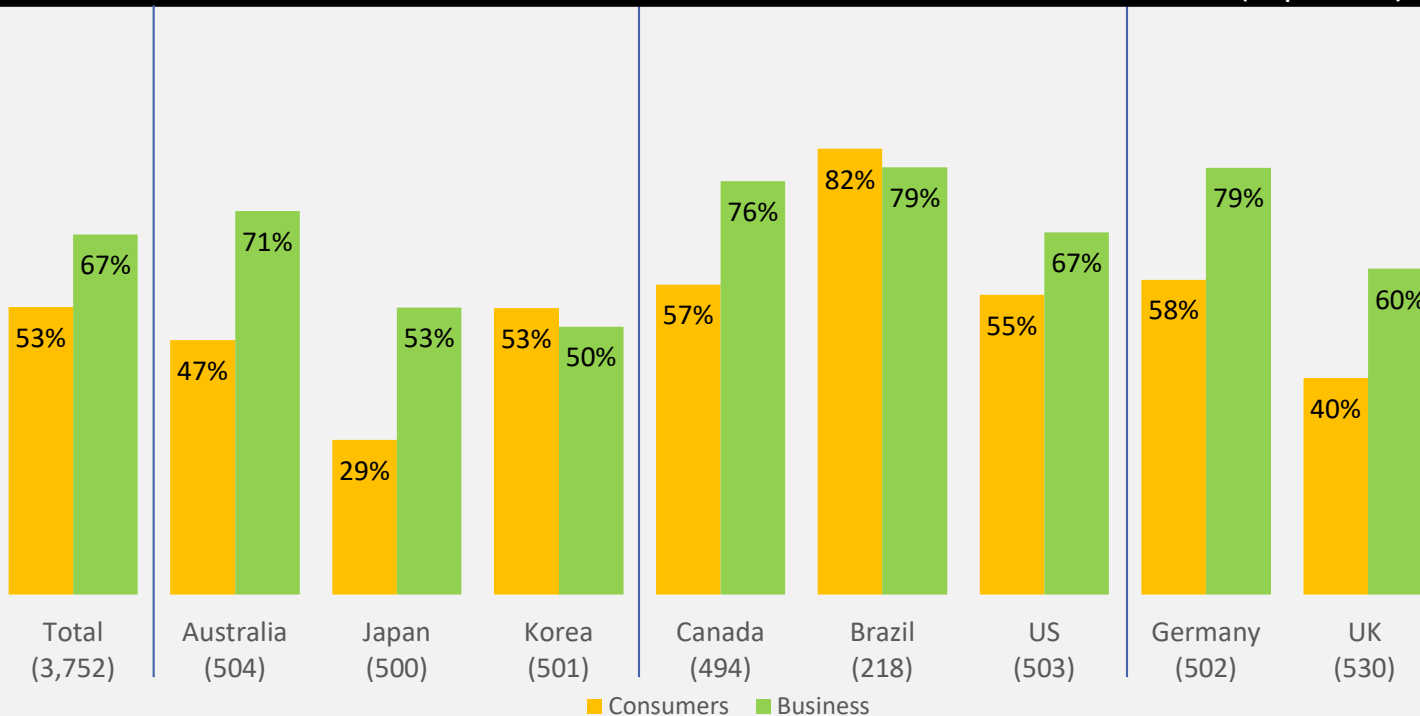




Outside of Korea and Brazil, market research is considered much more beneficial to businesses vs. consumers.



Extent Market Research is Perceived to be Beneficial to Consumers vs. Business (Top 2 Box)

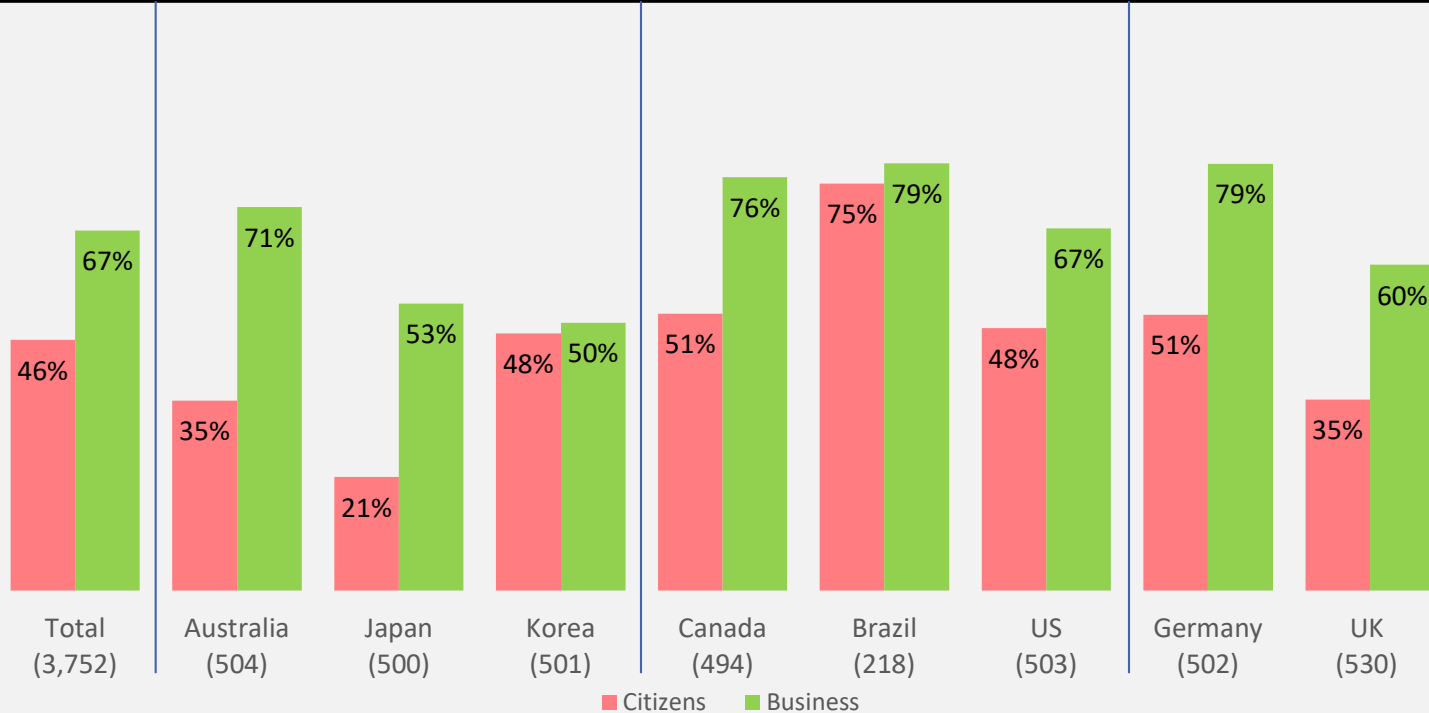




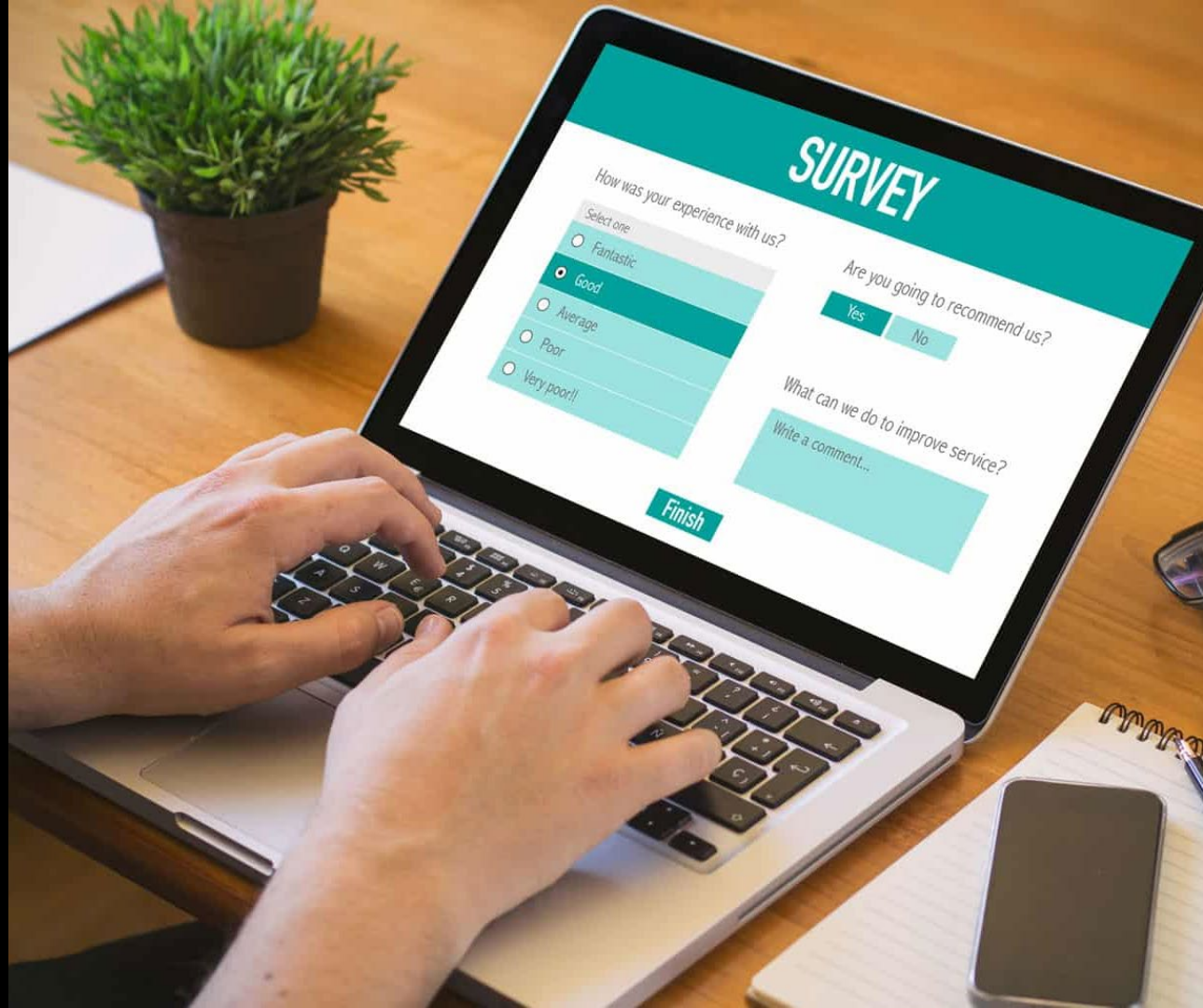
Similarly, most countries feel market research is more beneficial to businesses vs. citizens.



Extent Market Research is Perceived to be Beneficial to Citizens vs. Business (Top 2 Box)



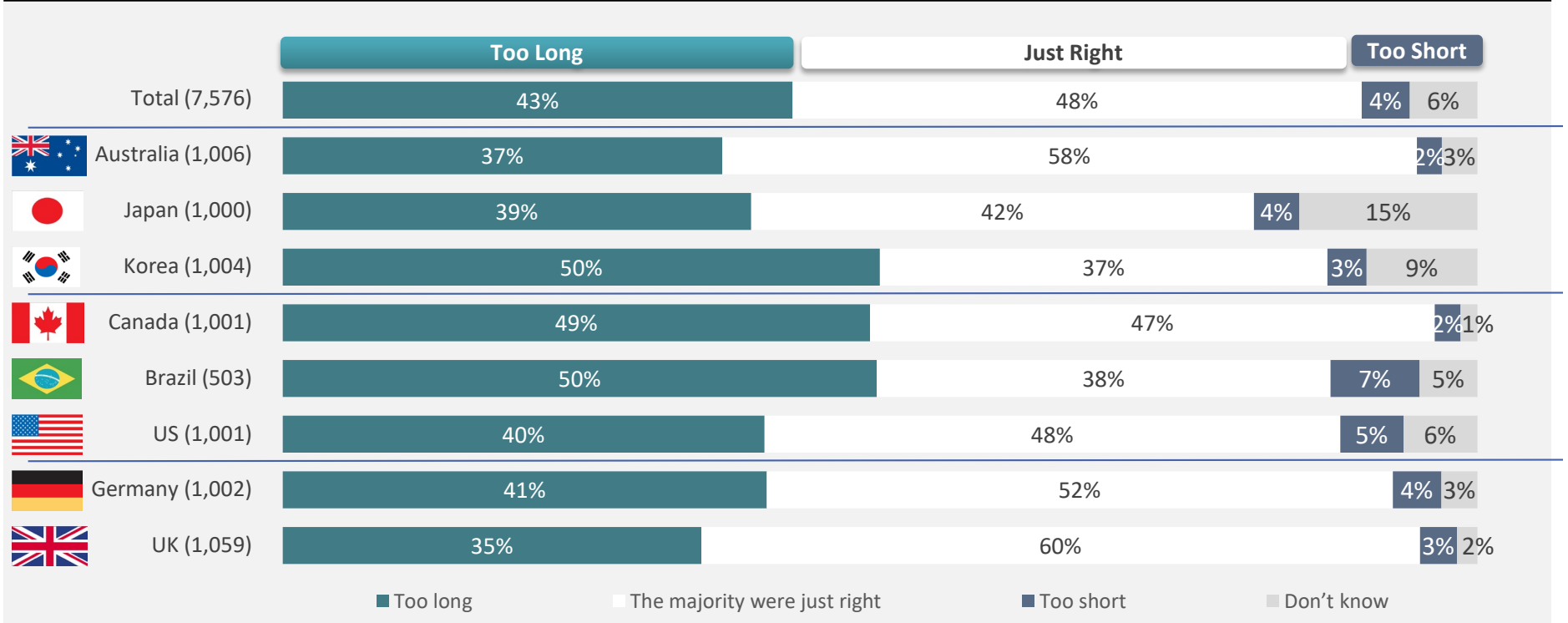
REACTIONS TO THE PARTICIPANT EXPERIENCE





There is a notable proportion who feel surveys are too long, more so in Korea, Canada, and Brazil.

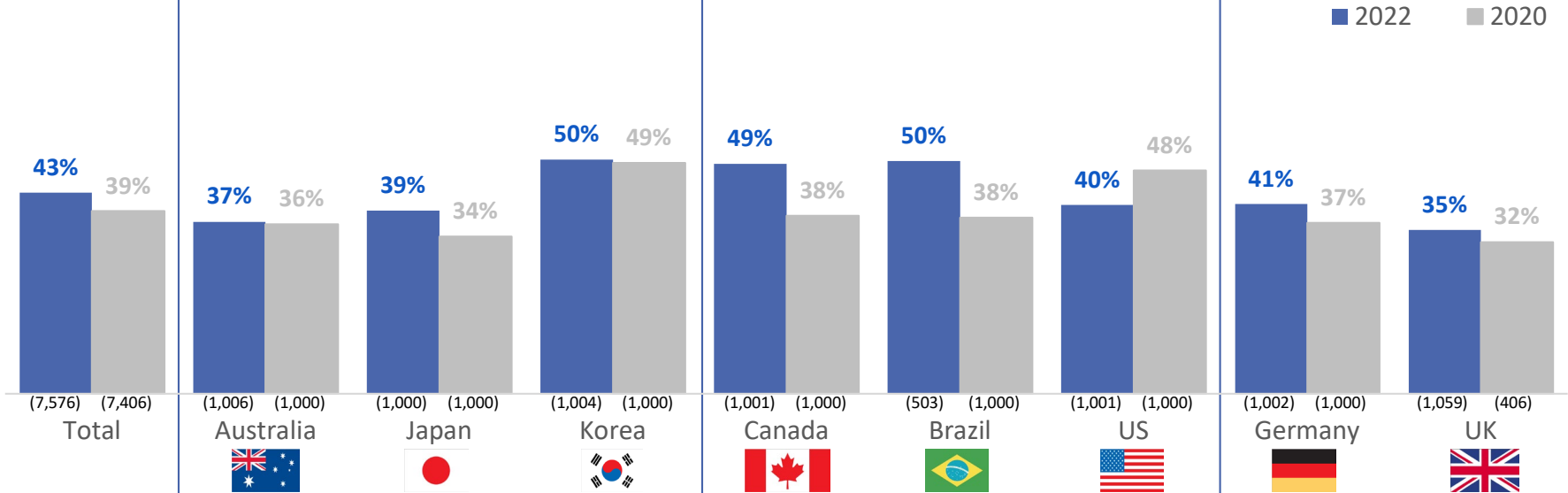
Perception of Survey Length





Concerns on survey length are rising in Canada and Brazil, but declining in the US.

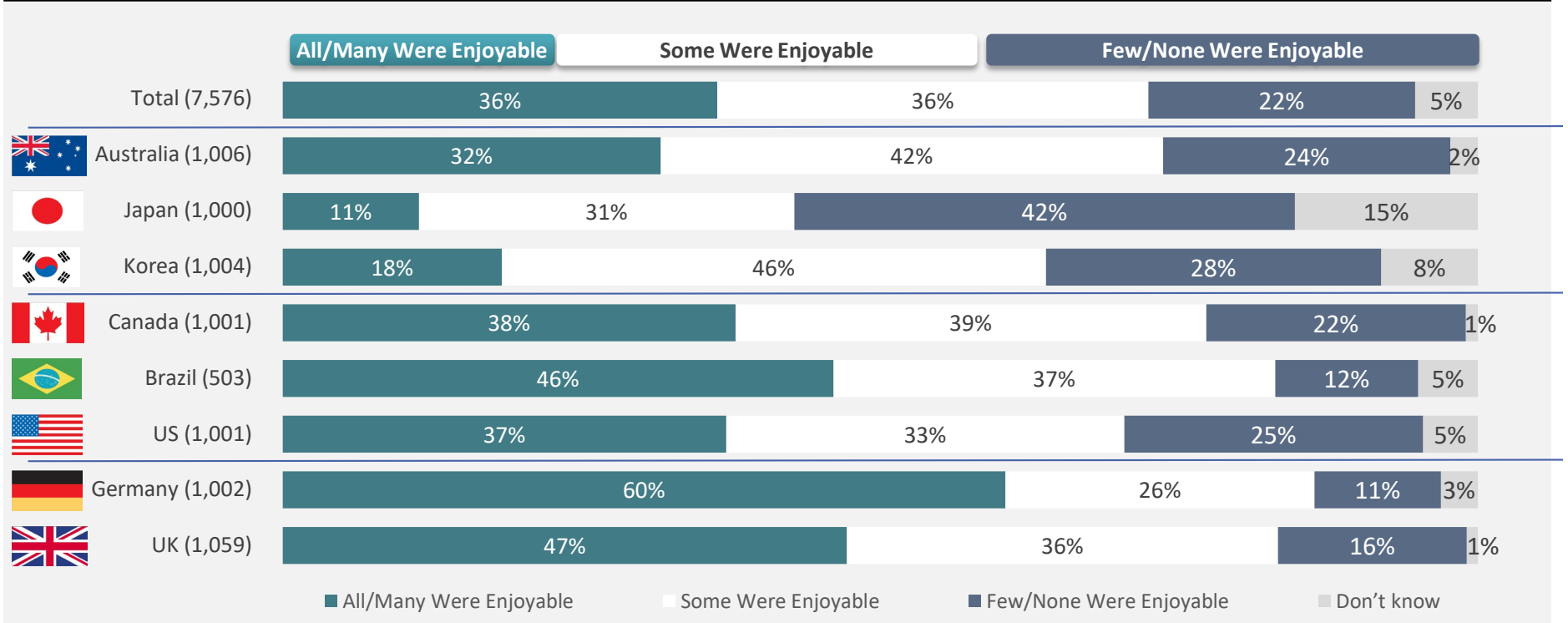
Perception of Survey Length (Too Long) - Trended to 2020





Enjoyment of the survey experience varies greatly by country; in Japan and Korea few are having a good experience, but survey enjoyment is much more likely in Germany.

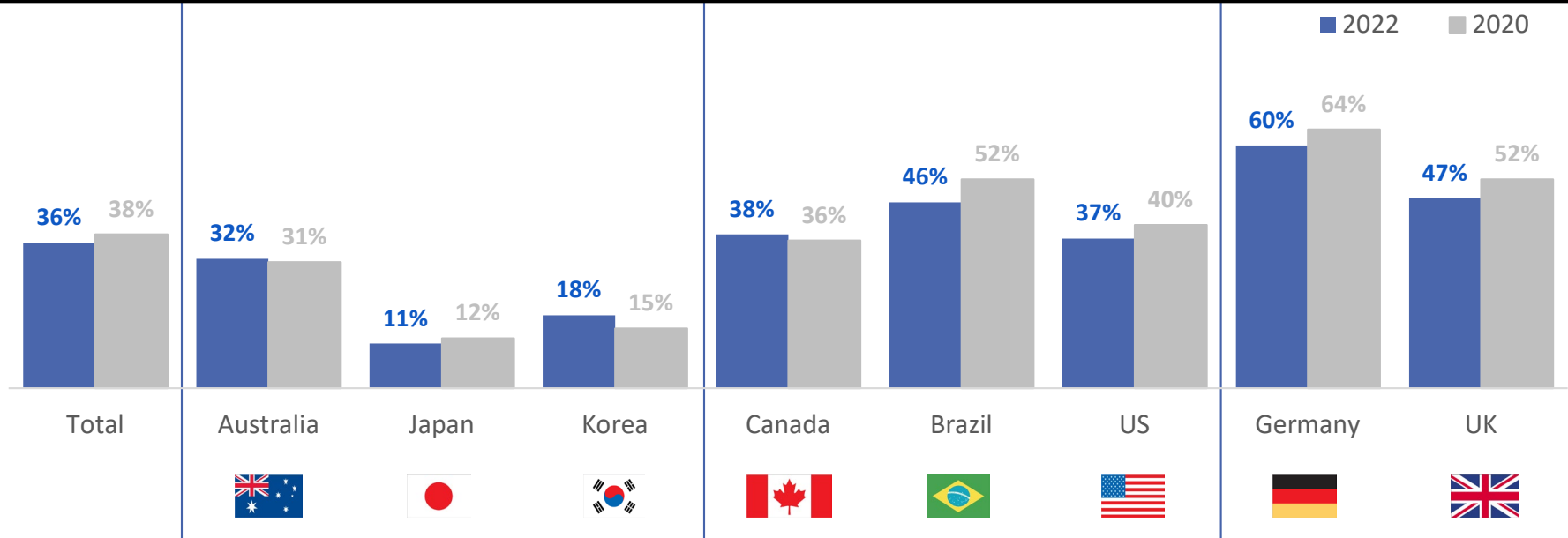
Perception of Survey Enjoyability





Across all countries, the proportion of times respondents are enjoying their survey experience is mostly consistent from wave to wave.

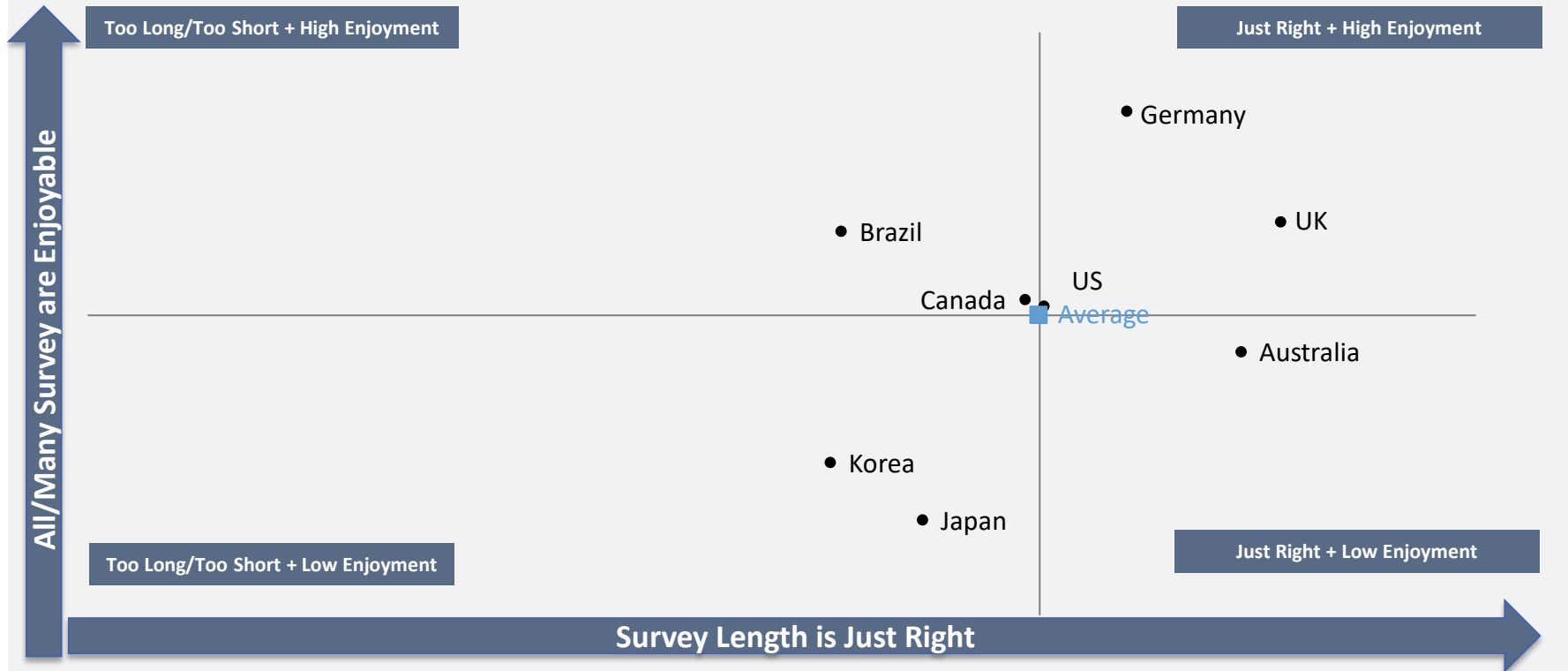
Perception of Survey Enjoyability (All/Many Were Enjoyable) - Trended to 2020





In Germany and the UK, survey length and survey enjoyment are directly related. However, despite feeling good about survey length in Australia, enjoyment is below average, and in Brazil enjoyment is high even with having concerns on survey length.

Relationship Between Survey Length and Enjoyability



PERSONAL DATA USE

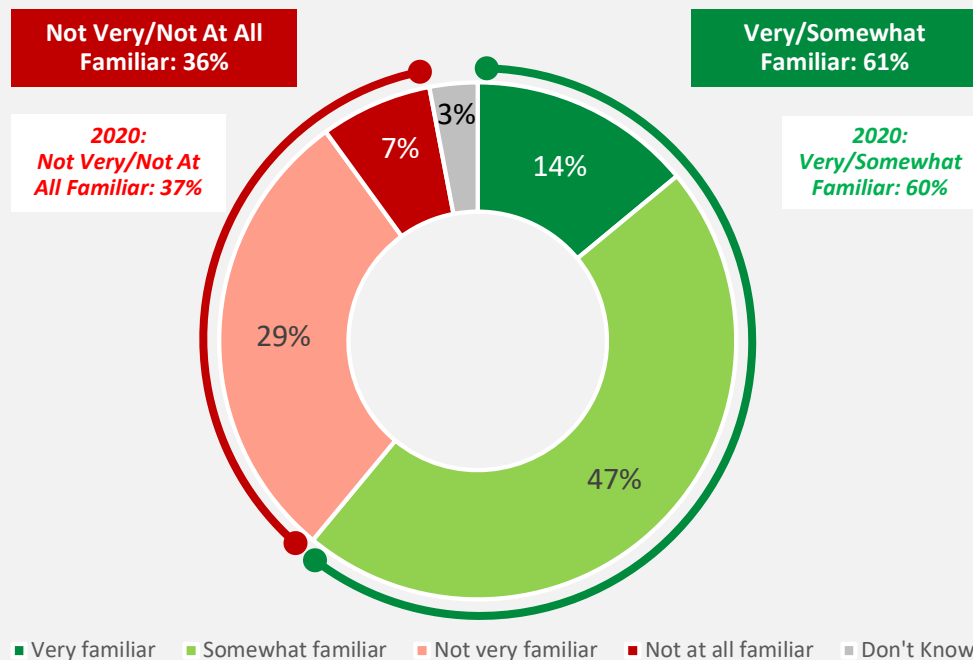




The majority continue to be at least somewhat familiar with the way their personal data is collected and used, but a significant minority are still not familiar with this matter.



Familiarity with Personal Data Collection and Use



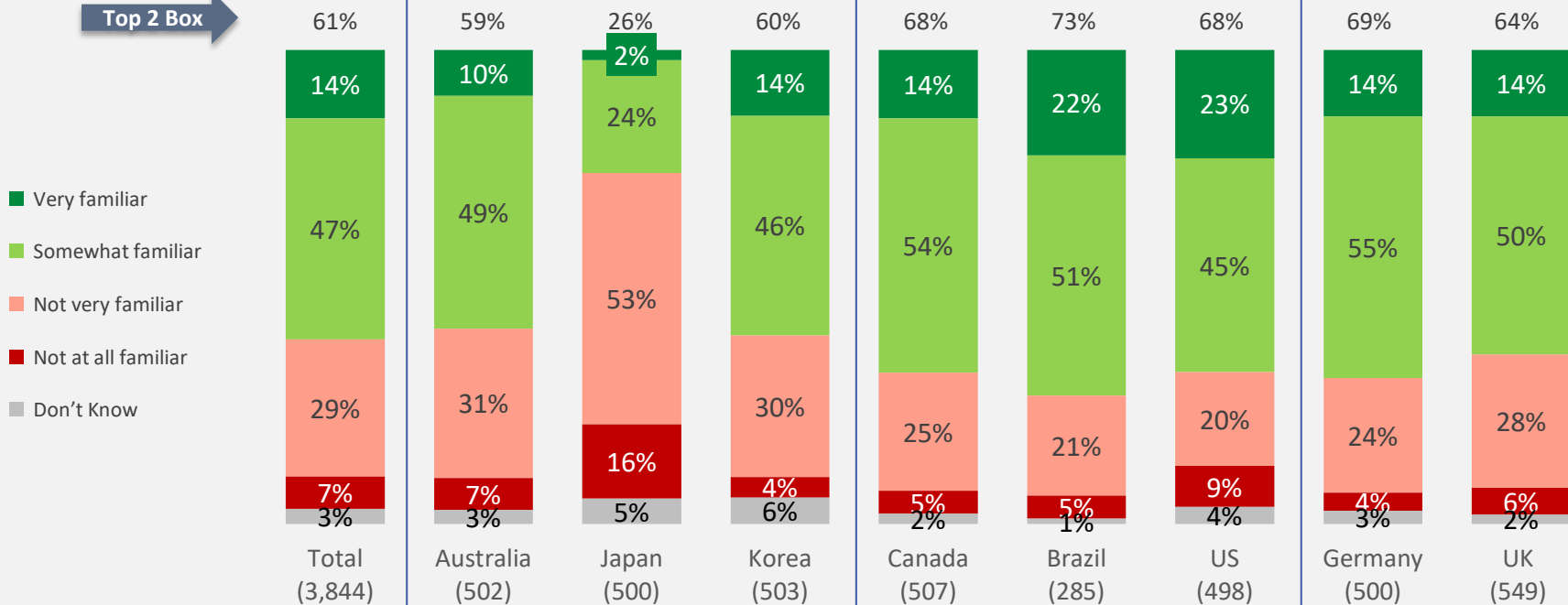


Familiarity with the collection and usage of their personal data is significantly lower in Japan relative to the other countries.



Familiarity with Personal Data Collection and Use

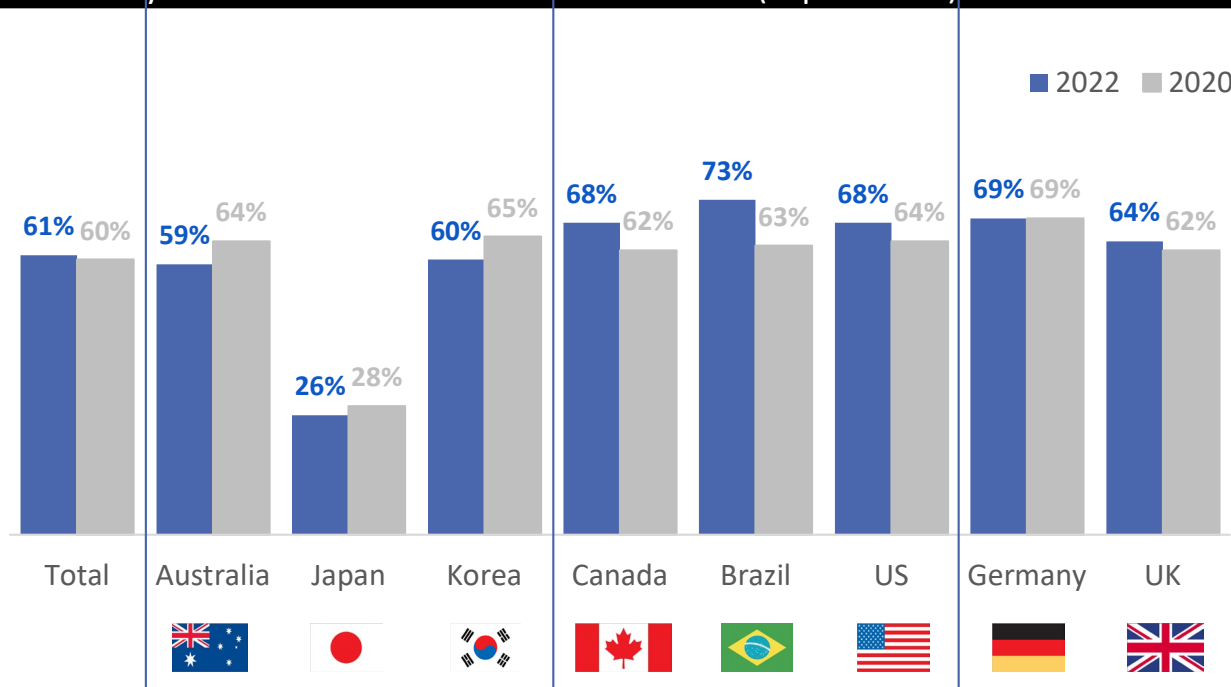
Top 2 Box





Familiarity is on the rise in Brazil and mostly flat in other countries.

Familiarity with Personal Data Collection and Use (Top 2 Box %) - Trended to 2020

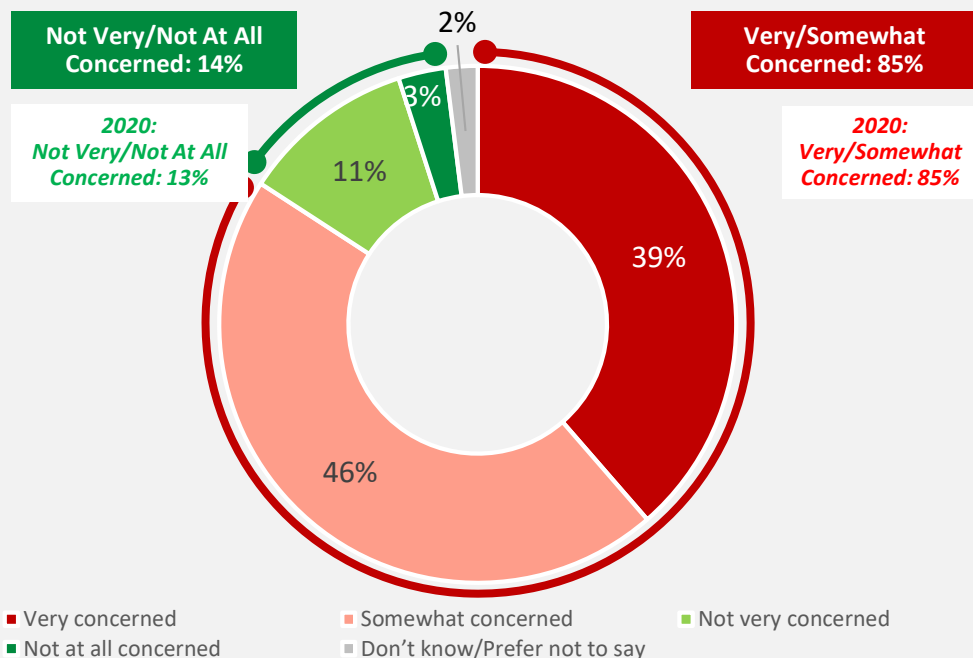




Concern over the misuse of personal data remains very high.



Level of Concern Regarding Misuse of Personal Data





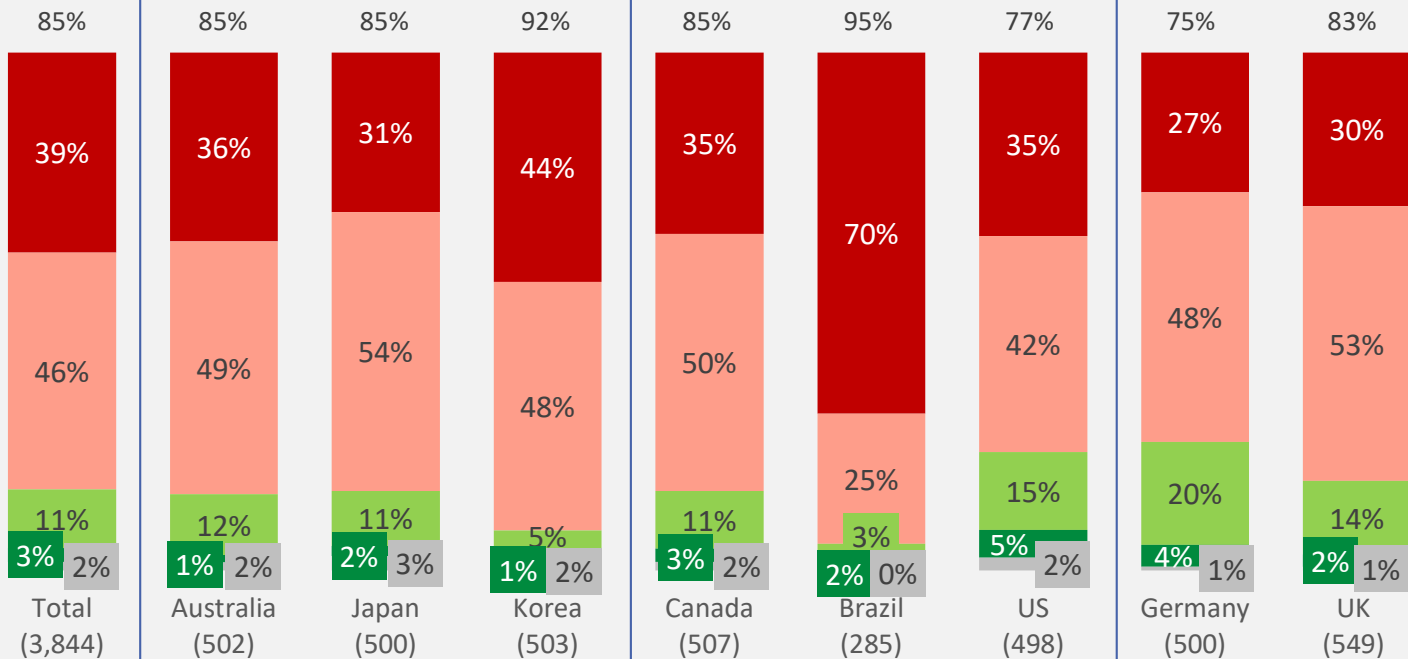
The concern is prevalent across all countries.



Level of Concern Regarding Misuse of Personal Data

Top 2 Box

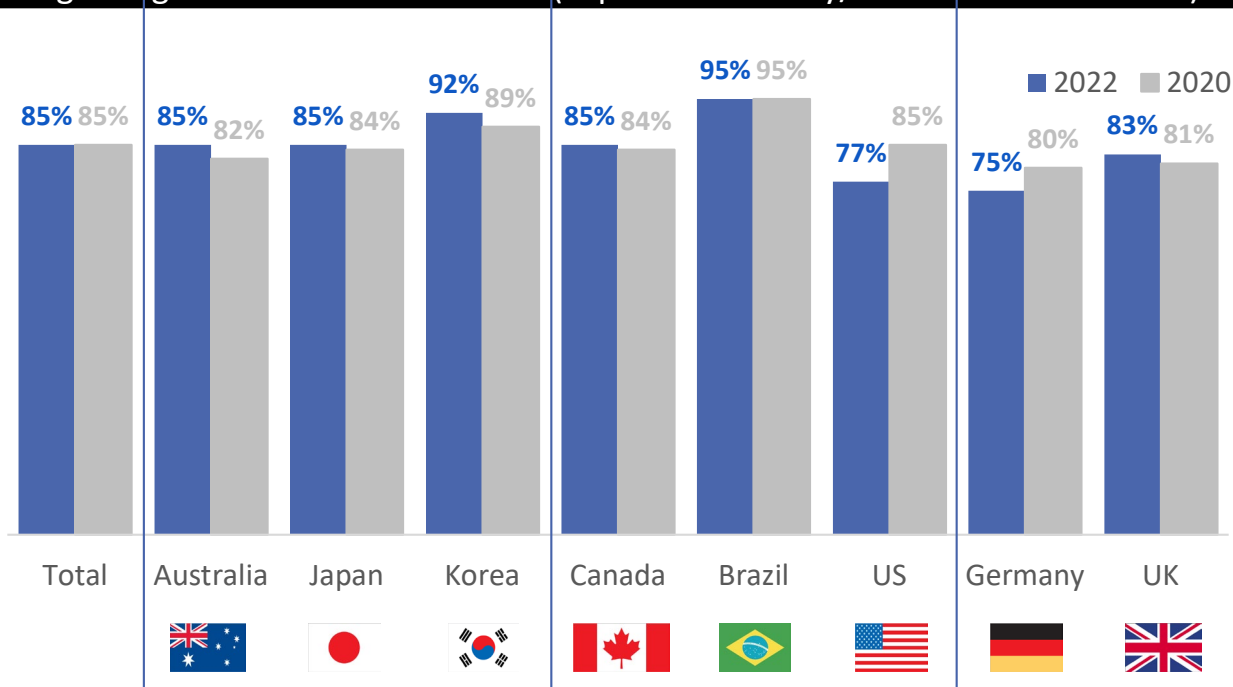
- Very concerned
- Somewhat concerned
- Not very concerned
- Not at all concerned
- Don't Know





Though still at high levels, the concern has declined in the US and Germany.

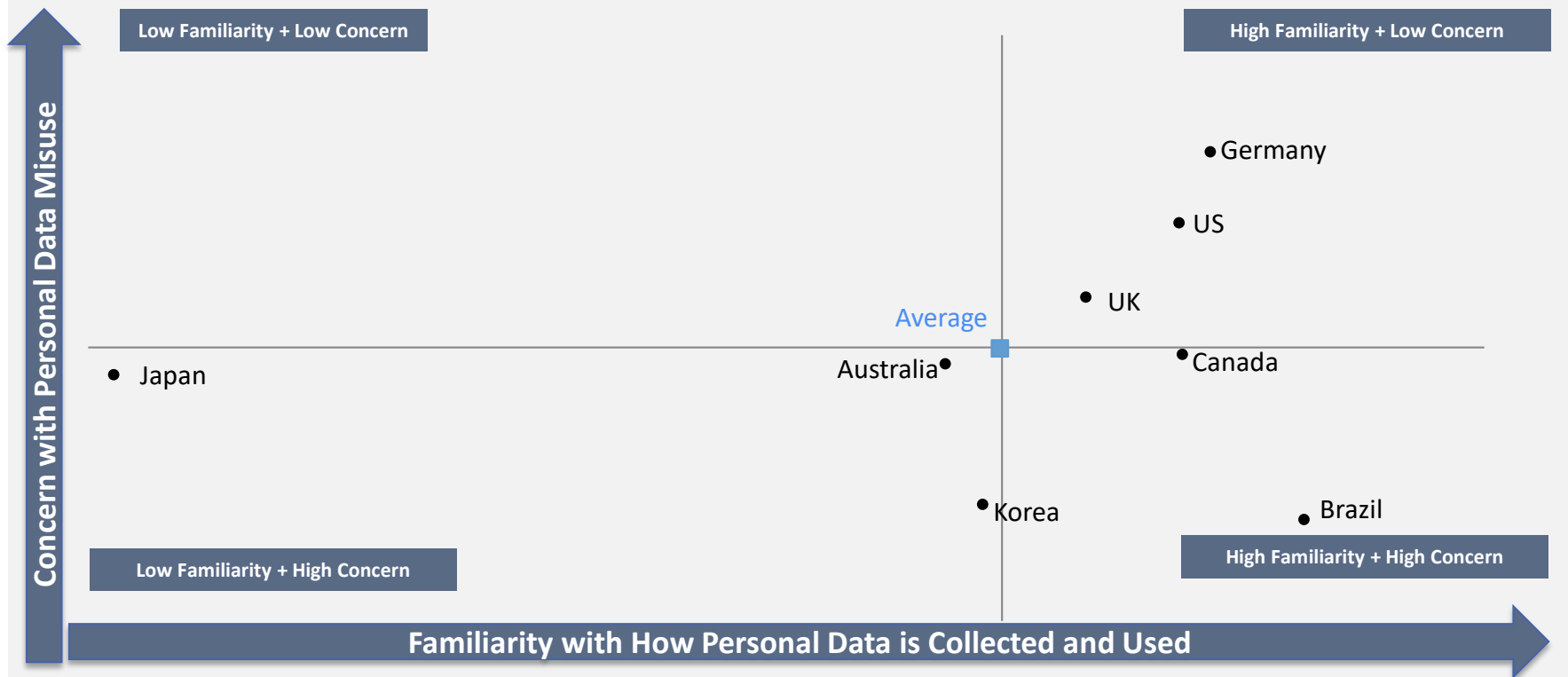
Level of Concern Regarding Misuse of Personal Data (Top 2 Box % - Very/Somewhat Concerned) - Trended to 2020





While high familiarity helps to alleviate concern in some countries, other countries still have high levels of concern with higher levels of familiarity.

Relationship Between Familiarity and Concern of Misuse of Personal Data Use



PROTECTION AND USE OF PERSONAL DATA

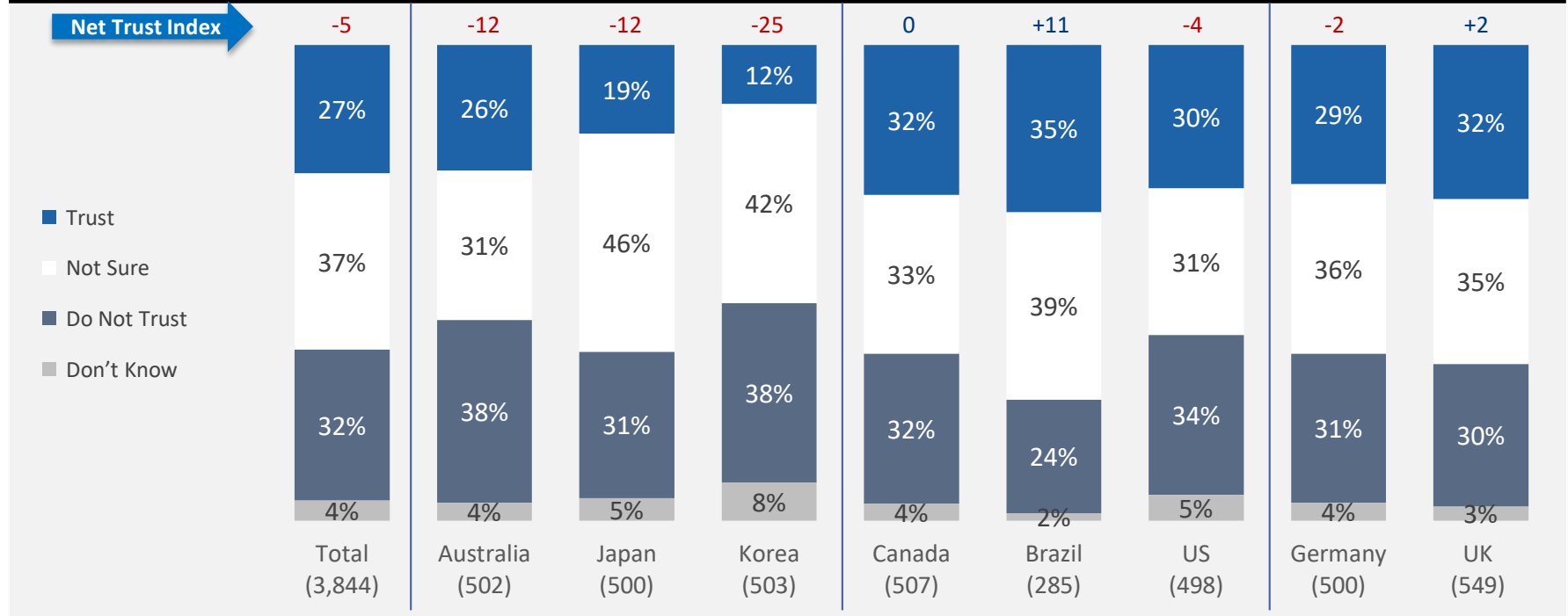




There is significant skepticism when it comes to trusting organizations with their personal data.



Average Level of Trust that Organizations/Professionals Protect and Appropriately Use Personal Data*











Net Trust Index = % Trust – % Do Not Trust

*Scores are an average across the 15 industries/organizations analyzed



Trust in protection and appropriate use of personal data is rising in Brazil and German and is mostly flat in other countries.

Average Level of Trust that Organizations/Professionals Protect and Appropriately Use Personal Data* - Trended to 2020

	Total								
Net Trust Index	2022 -5 vs. 2020 +2	-12 -3	-12 --	-25 -5	-- +2	+11 +7	-4 -2	-2 +13	+2 +2
% Trust	2022 27% vs. 2020 +1%	26% --	19% --	12% -4%	32% +2%	35% +3%	30% -1%	29% +8%	32% +1%
% Do Not Trust	2022 32% vs. 2020 -1%	38% +3%	31% --	38% +2%	32% --	24% -4%	34% +2%	31% -5%	30% -1%

Net Trust Index = % Trust – % Do Not Trust

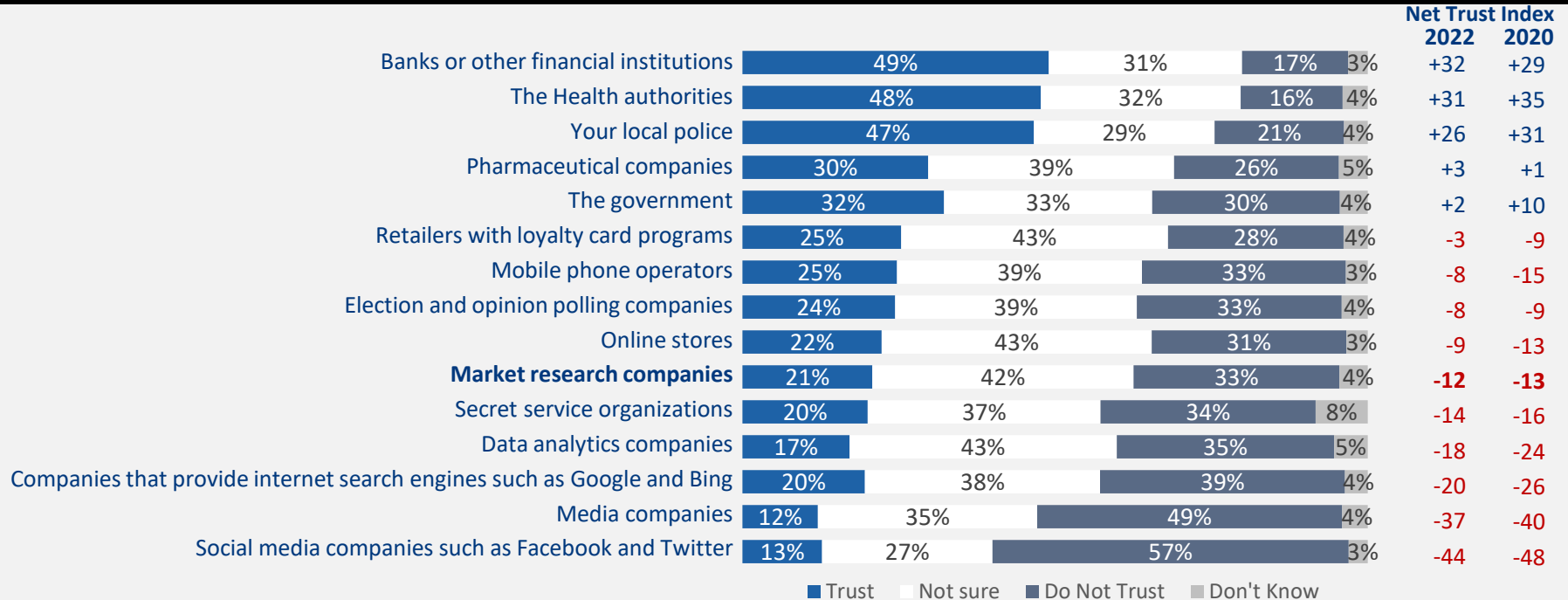
*Scores are an average across the 15 industries/organizations analyzed



Organizations most trusted to guard against the misuse of personal data are those in the finance, health, and law enforcement sectors. There is a significant lack of trust in media and social media companies in this regard. Market research companies rank towards the bottom relative to the other industries.

Note that trust in government in this matter is lower in 2022 than in 2020, whilst trust in tech related sectors tends to be up

Level of Trust that Organizations/Professionals Protect and Appropriately Use Personal Data

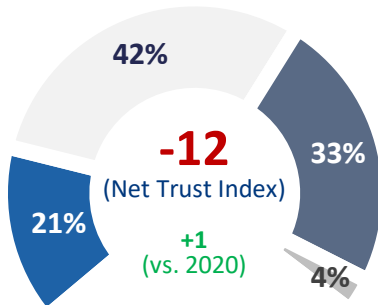


Net Trust Index = % Trust – % Do Not Trust

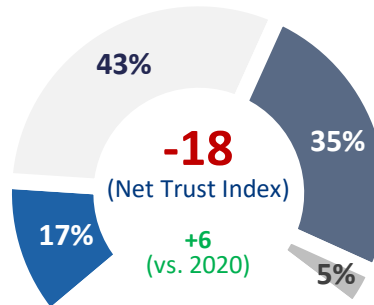


In the “insights space,” data analytics companies, though gaining trust since 2020, are the least trusted when it comes to the protection and use of personal data.

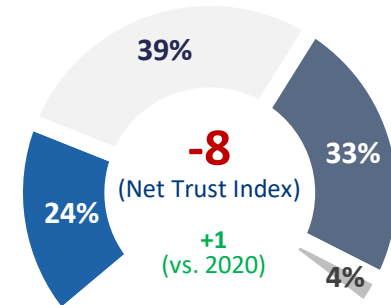
Trust in Market Research



Trust in Data Analytics



Trust in Election and Opinion Polling



- Trust
- Not Sure
- Do Not Trust
- Don't know

Net Trust Index = % Trust – % Do Not Trust

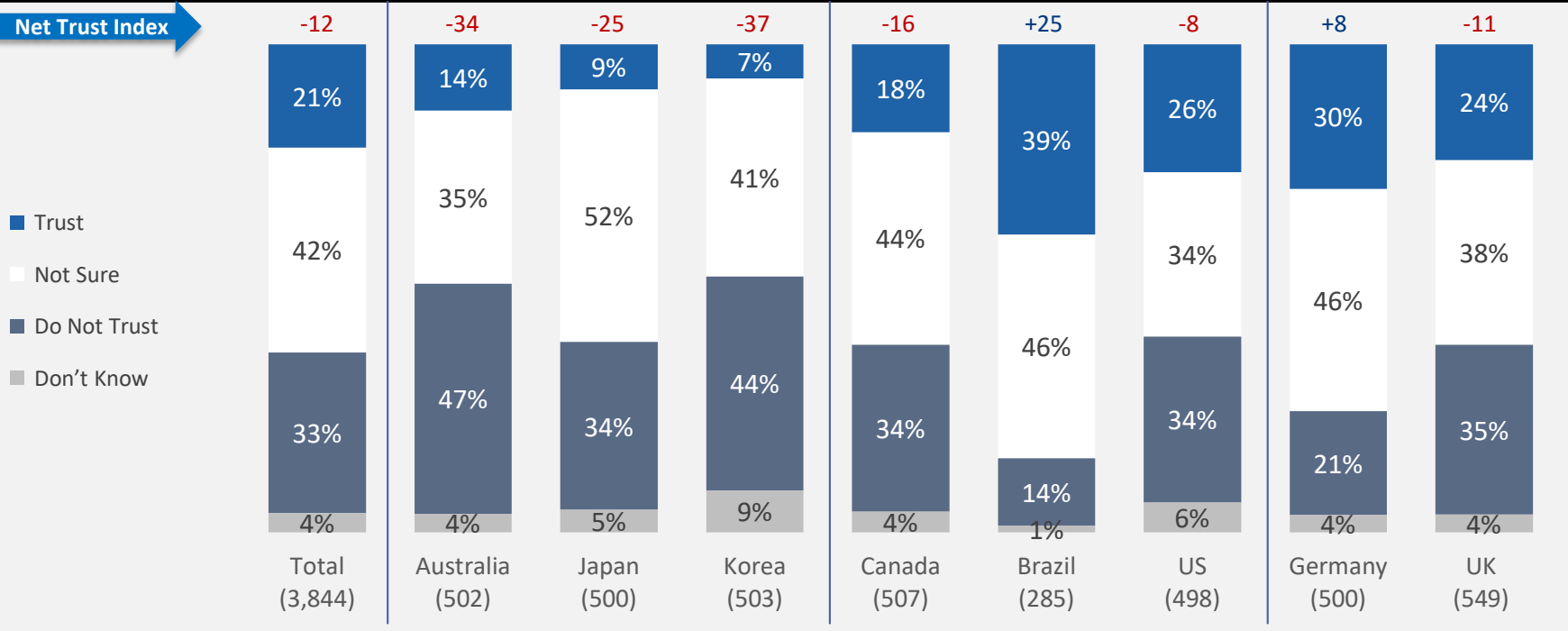


Outside of Brazil and Germany, there is little trust in the ability of market research companies to protect and appropriately use their personal data.



Trust in Market Research to Protect and Appropriately Use Personal Data

Net Trust Index











Net Trust Index = % Trust – % Do Not Trust



Trust of market research companies in this regard is slightly up in the US and Germany.

Trust in Market Research to Protect and Appropriately Use Personal Data - Trended to 2020

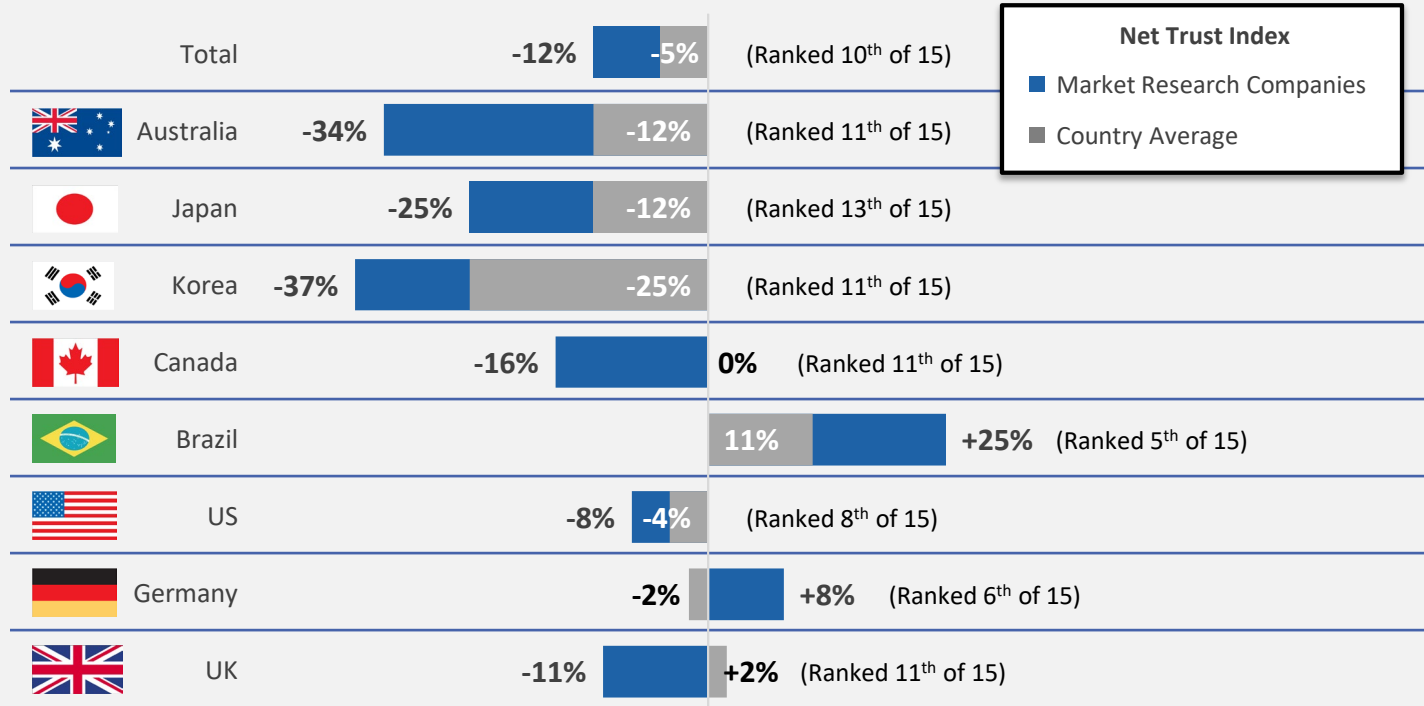
	Total								
Net Trust Index	2022 -12 vs. 2020 +1	-34 -3	-25 -2	-37 +1	-16 --	+25 -1	-8 +4	+8 +7	-11 +1
% Trust	2022 21% vs. 2020 +1%	14% +2%	9% --	7% --	18% -1%	39% -2%	26% +3%	30% +7%	24% +1%
% Do Not Trust	2022 33% vs. 2020 --	47% +3%	34% +2%	44% -1%	34% -1%	14% -1%	34% -1%	21% -1%	35% --

Net Trust Index = % Trust – % Do Not Trust



Compared to other industries, market research companies perform in the upper half in Brazil and Germany, but rank lower in other countries.

Trust in Market Research to Protect and Appropriately Use Personal Data (vs. Country Average)



Net Trust Index = % Trust – % Do Not Trust

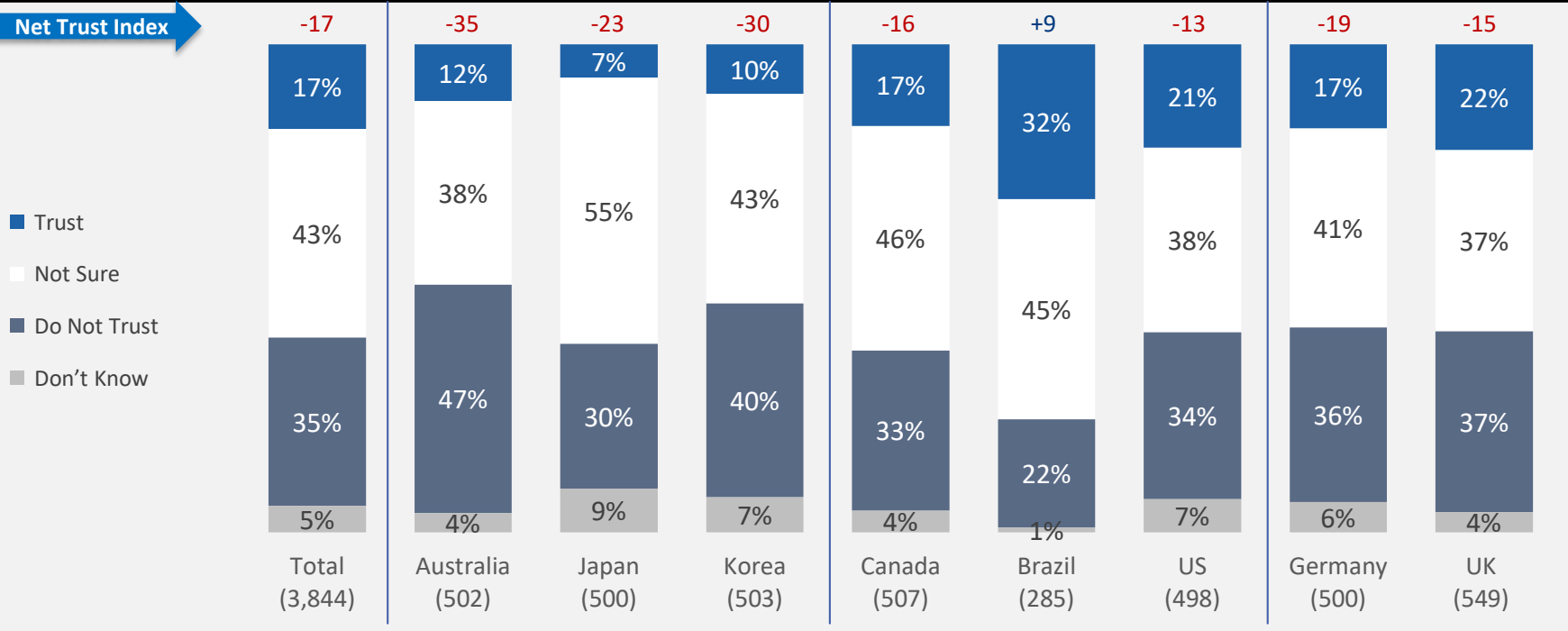


Except for Brazil, there is a lack of trust when it comes to data analytics and the protection/usage of personal data.



Trust in Data Analytics to Protect and Appropriately Use Personal Data

Net Trust Index











Net Trust Index = % Trust – % Do Not Trust



While net levels are still mostly negative, trust in this regard is rising in many countries.

Trust in Data Analytics to Protect and Appropriately Use Personal Data - Trended to 2020

	Total								
Net Trust Index	2022 -17 vs. 2020 +7	-35 --	-23 +1	-30 +1	-16 +7	+9 +10	-13 +5	-19 +17	-15 +10
% Trust	2022 17% vs. 2020 +3%	12% +4%	7% --	10% +2%	17% +2%	32% +7%	21% +1%	17% +8%	22% +5%
% Do Not Trust	2022 35% vs. 2020 -3%	47% +3%	30% -2%	40% +1%	33% -5%	22% -4%	34% -4%	36% -9%	37% -5%

Net Trust Index = % Trust – % Do Not Trust

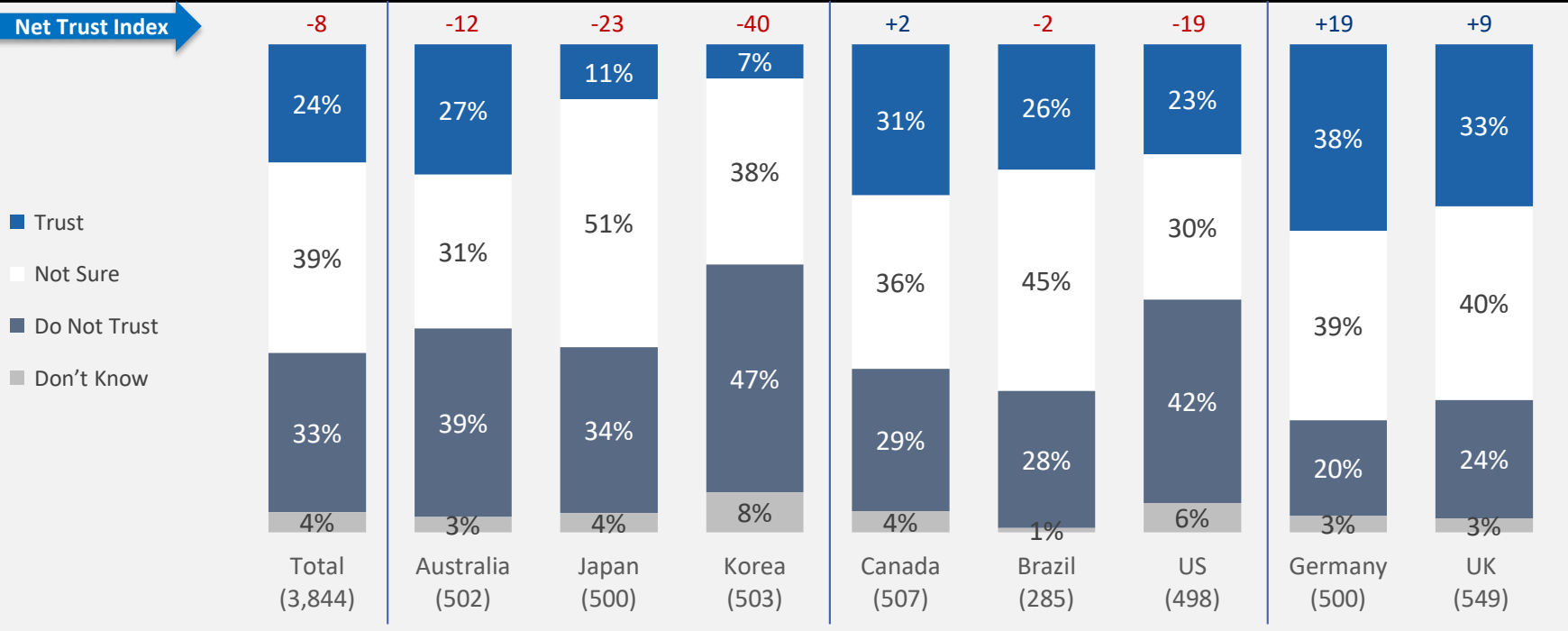


Trust in election and opinion polling companies to appropriately use and protect personal data is highest in Germany and the UK; distrust is strongest in Korea and the US.



Trust in Election and Opinion Polling to Protect and Appropriately Use Personal Data

Net Trust Index











Net Trust Index = % Trust – % Do Not Trust



In Brazil and Germany, trust in election and opinion polling companies to appropriately use and protect personal data has increased.

Trust in Election and Opinion Polling to Protect and Appropriately Use Personal Data - Trended to 2020

	Total								
Net Trust Index	2022 -8 vs. 2020 +1	-12 -3	-23 -2	-40 -6	+2 -4	-2 +12	-19 -1	+19 +11	+9 -2
% Trust	2022 24% vs. 2020 --	27% --	11% -2%	7% -5%	31% -2%	26% +3%	23% --	38% +8%	33% -1%
% Do Not Trust	2022 33% vs. 2020 --	39% +3%	34% +1%	47% +1%	29% +2%	28% -9%	42% +1%	20% -2%	24% +1%

Net Trust Index = % Trust – % Do Not Trust

**DRIVERS OF TRUST IN
MARKET RESEARCH TO
PROTECT AND
APPROPRIATELY USE
PERSONAL DATA**

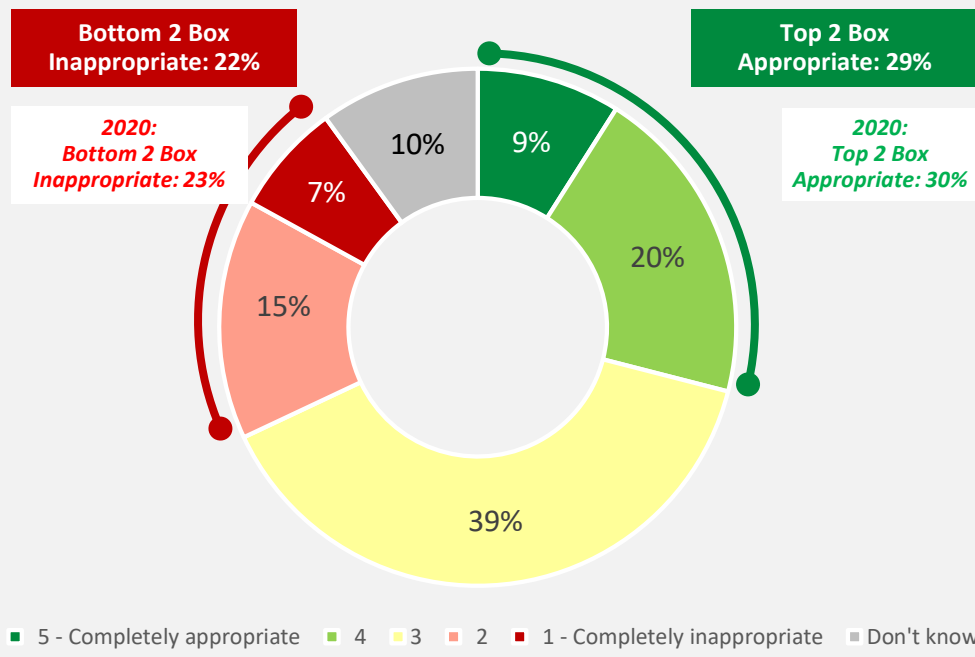




Consistent with levels in 2020, just under one-in-three feel that the use of their personal data by market research companies is appropriate.



Appropriate Use of Personal Data by Market Research



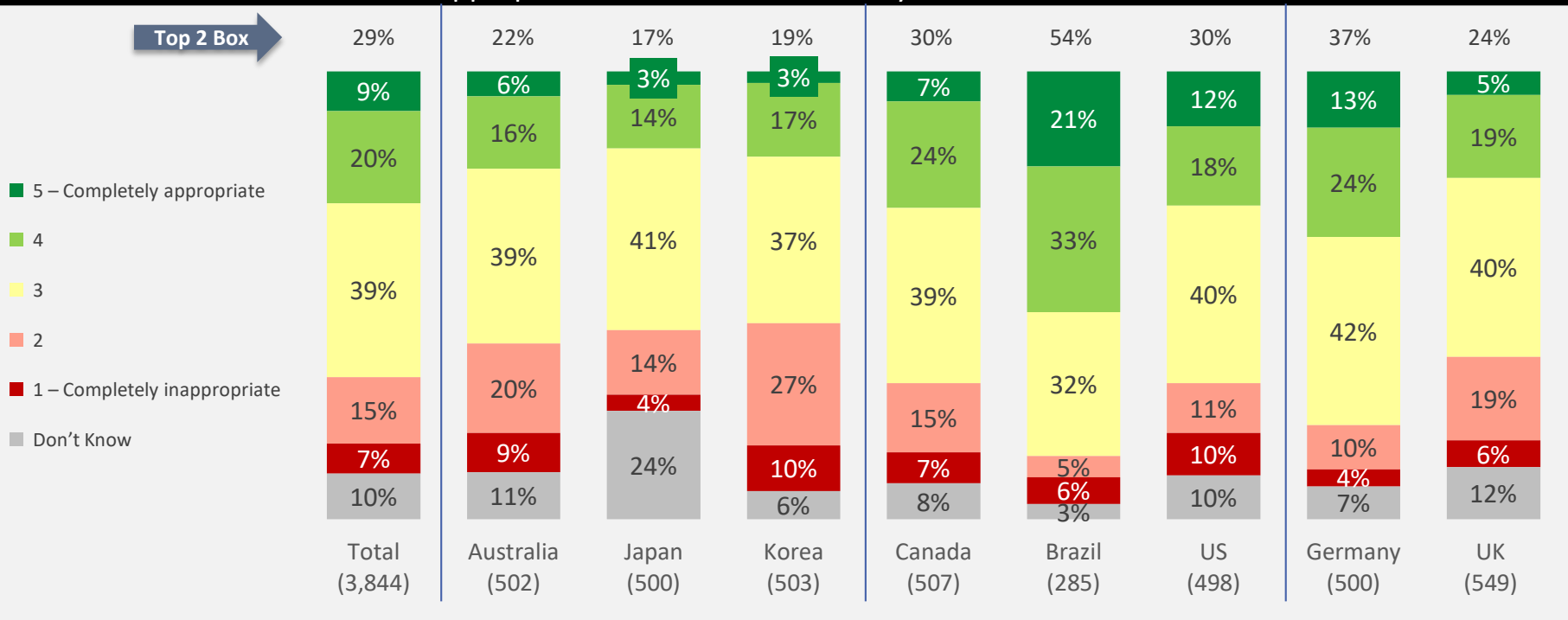


Feeling market research companies use their personal data appropriately is strongest in Brazil and the weakest in Australia, Japan, and Korea.



Appropriate Use of Personal Data by Market Research

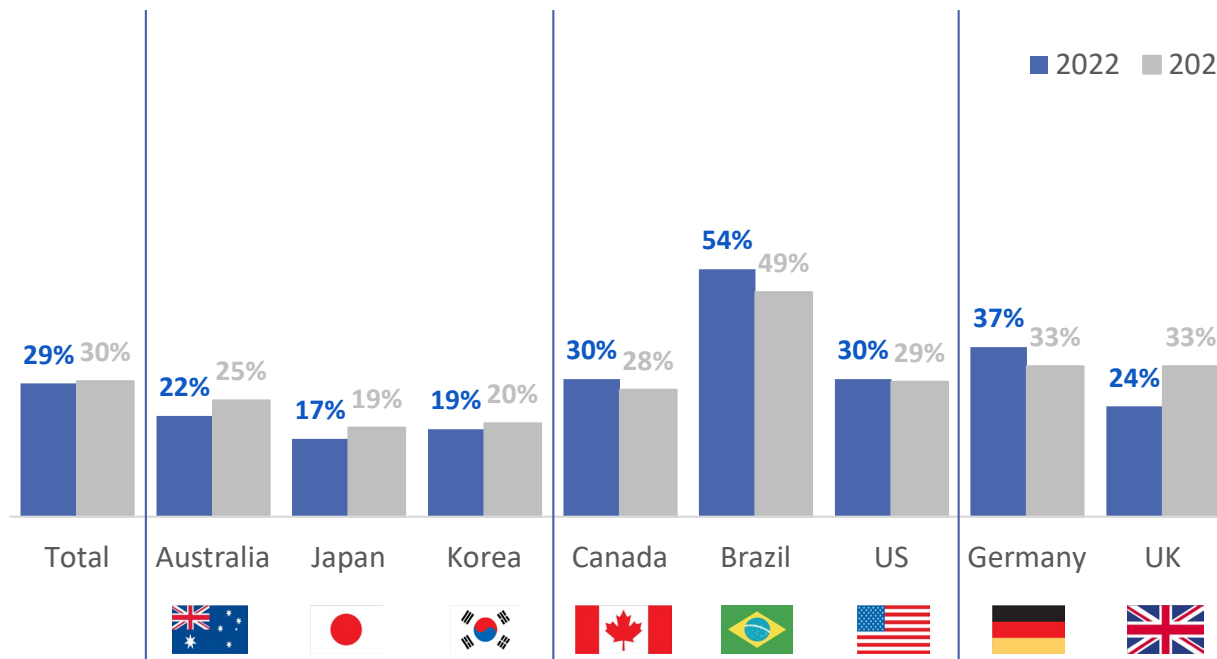
Top 2 Box





Those in the UK are less likely (vs. 2020) to feel market research companies use their personal data appropriately

Appropriate Use of Personal Data by Market Research (Top 2 Box %) - Trended to 2020

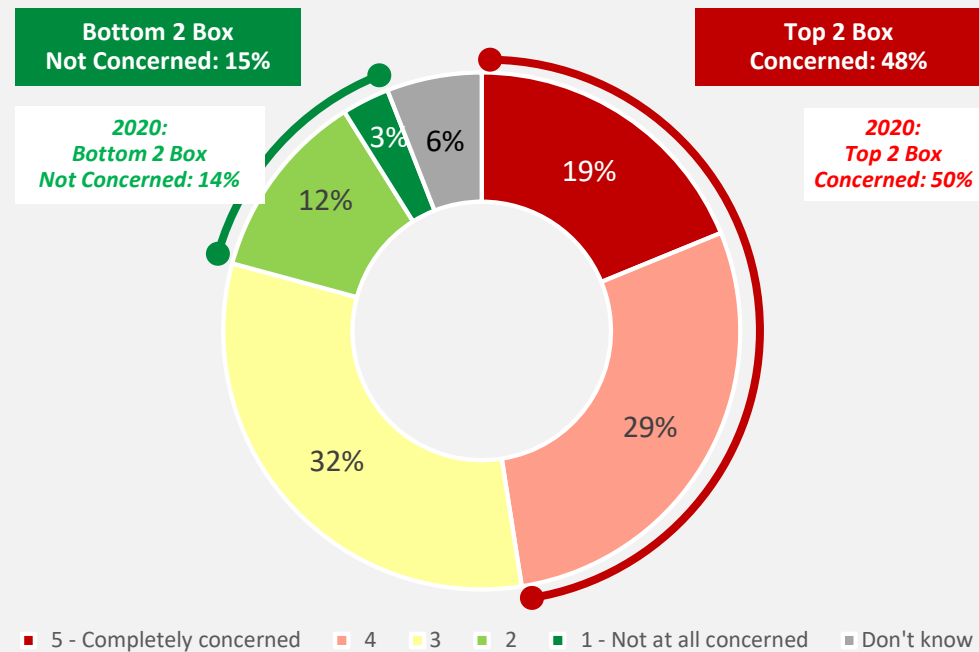




There are still high levels of concern over the protection of personal data by market research companies.



Concern that Market Research Securely Protects Personal Data



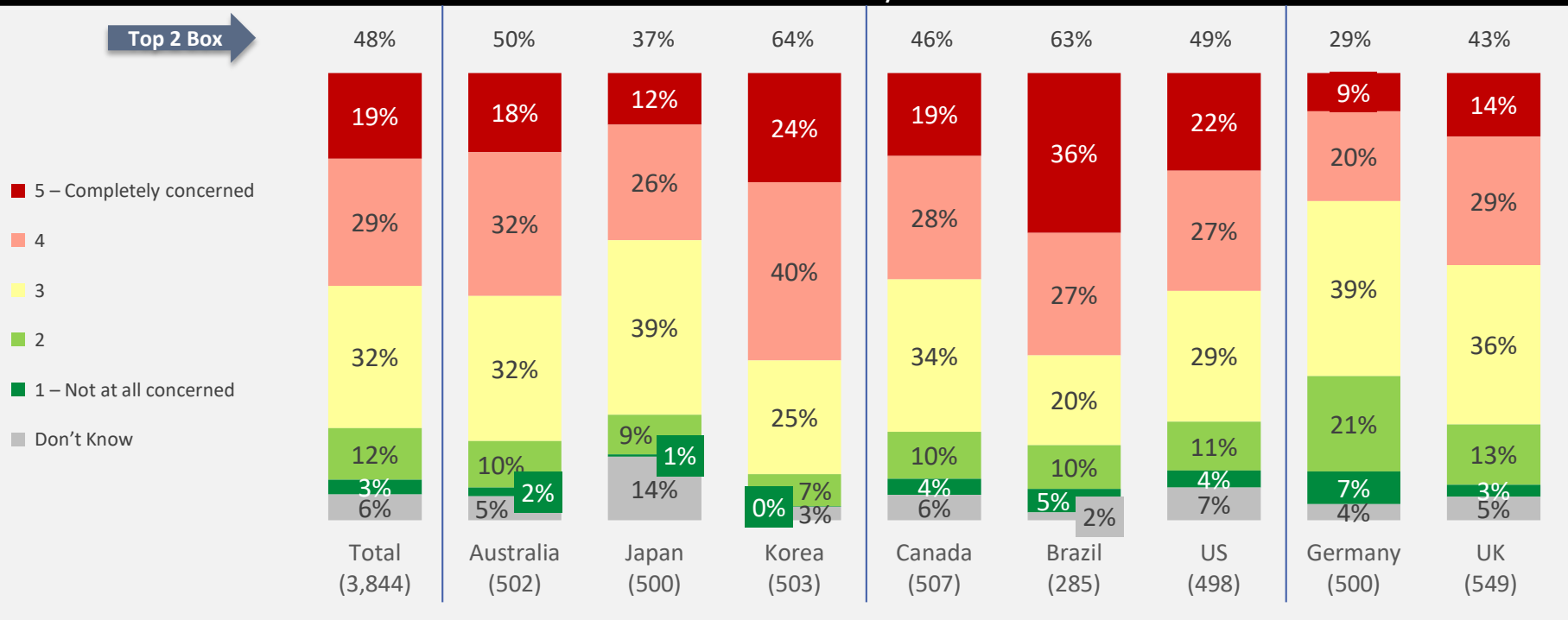


Concern is lowest in Japan and Germany.



Concern that Market Research Securely Protects Personal Data

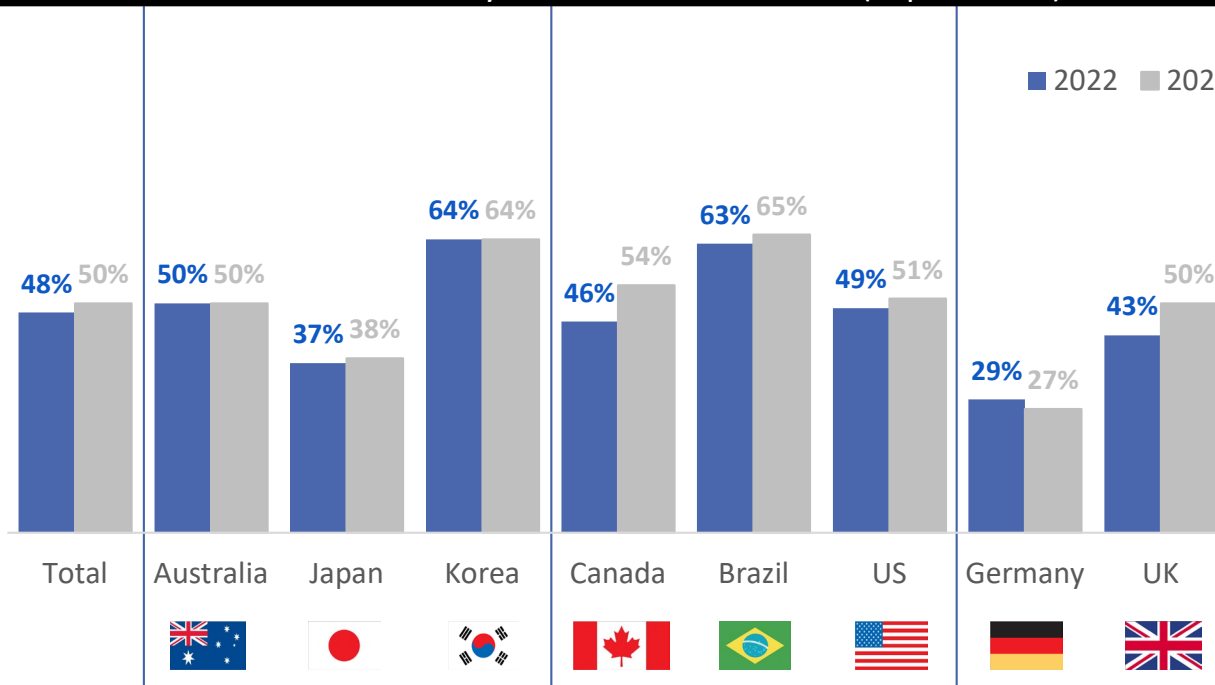
Top 2 Box





Concern has declined in Canada and the UK.

Concern that Market Research Securely Protects Personal Data (Top 2 Box %) - Trended to 2020

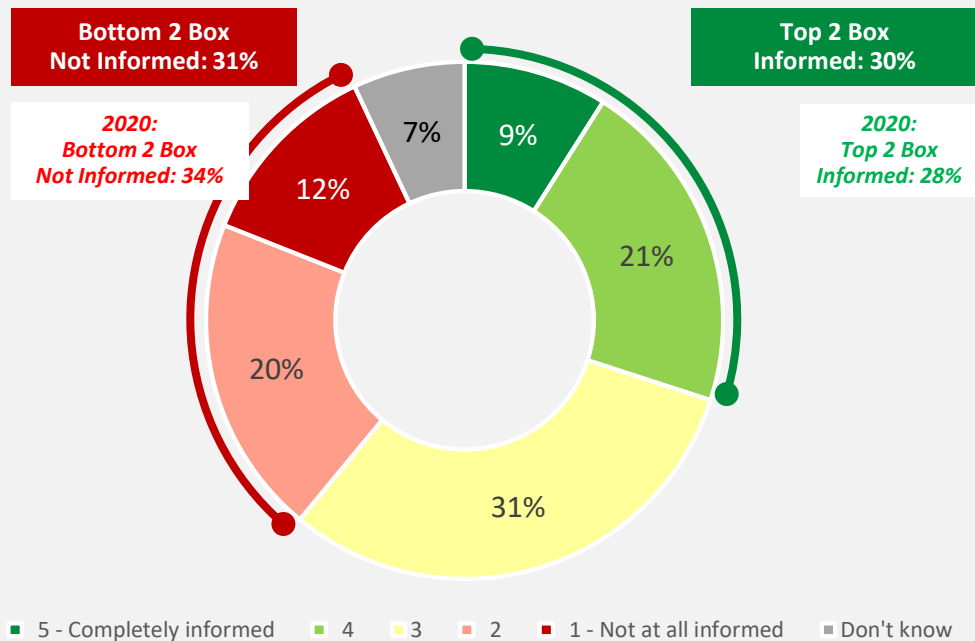




There is a mixed level on knowledge regarding the collection, storage and usage of personal data by market research companies, and very few feel completely informed.

Do you know where
your data is?

Degree Informed about Personal Data Collection, Storage and Use



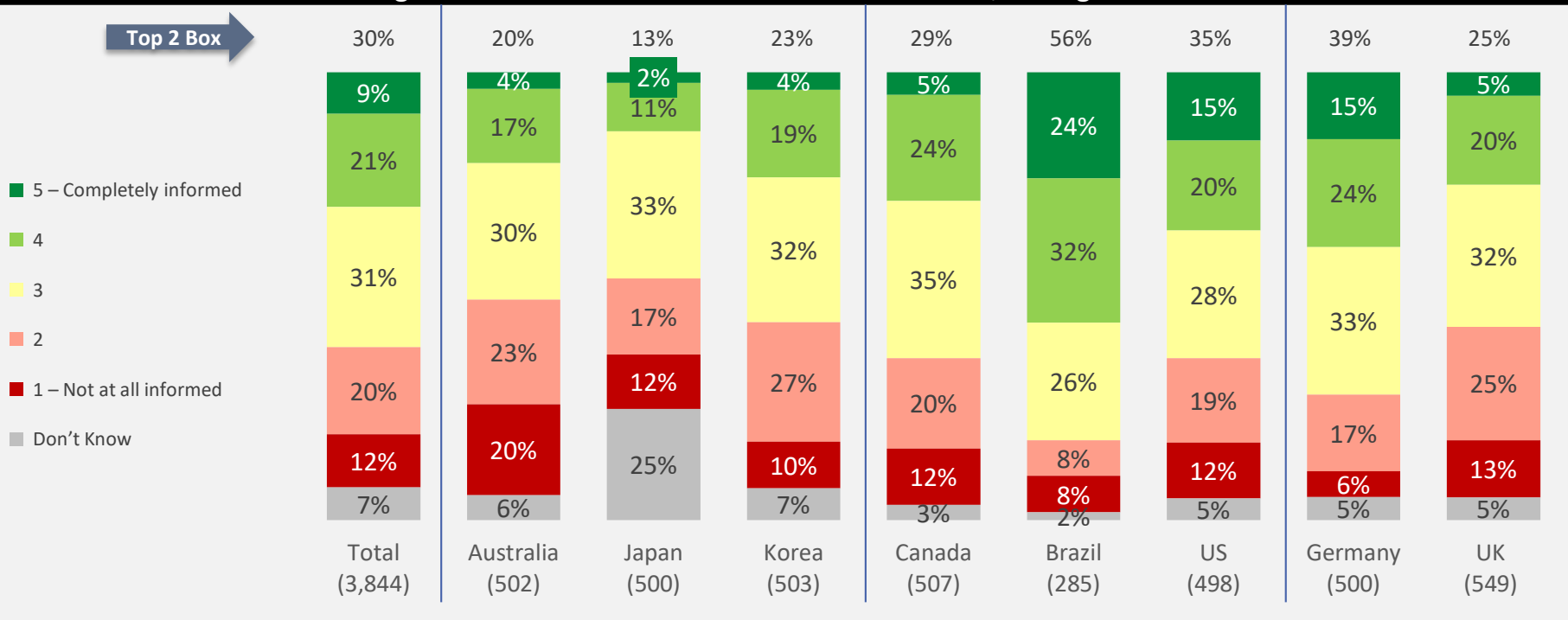


Feeling informed is highest in Brazil and the lowest in Japan.



Degree Informed about Personal Data Collection, Storage and Use

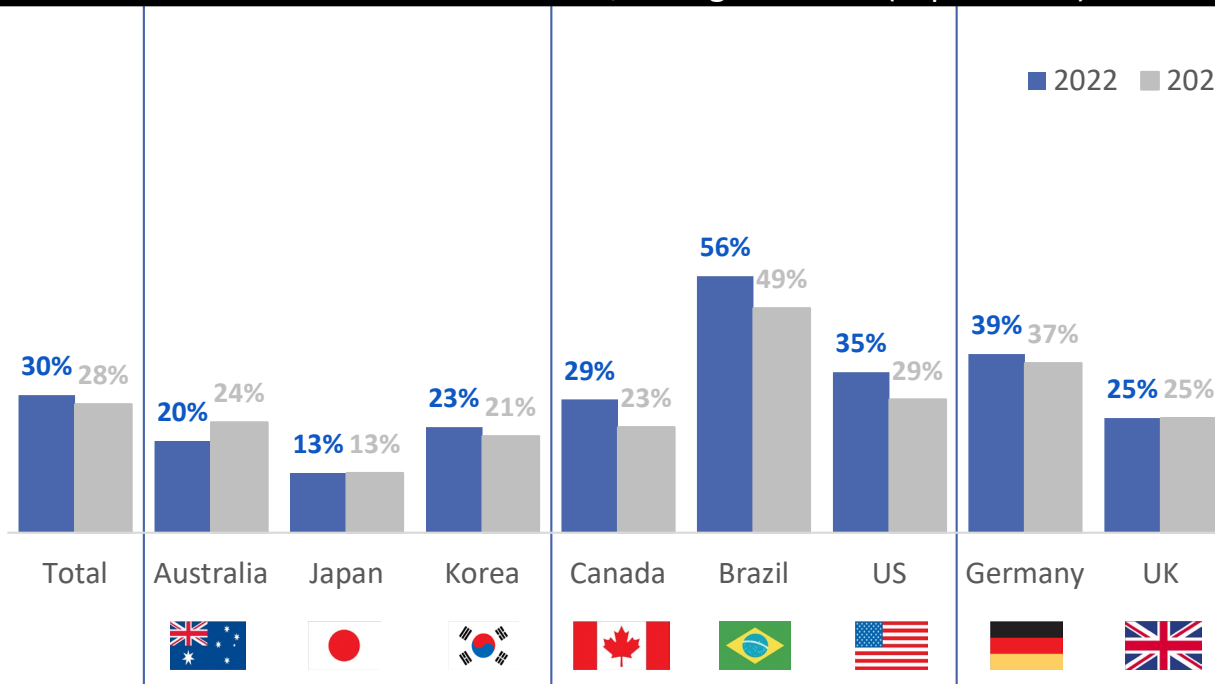
Top 2 Box





Those in Brazil and the US feel more informed relative to how they felt in 2020.

Degree Informed about Personal Data Collection, Storage and Use (Top 2 Box %) - Trended to 2020



**HOW COVID-19
HAS CHANGED
THE LEVEL OF TRUST**



COVID-19

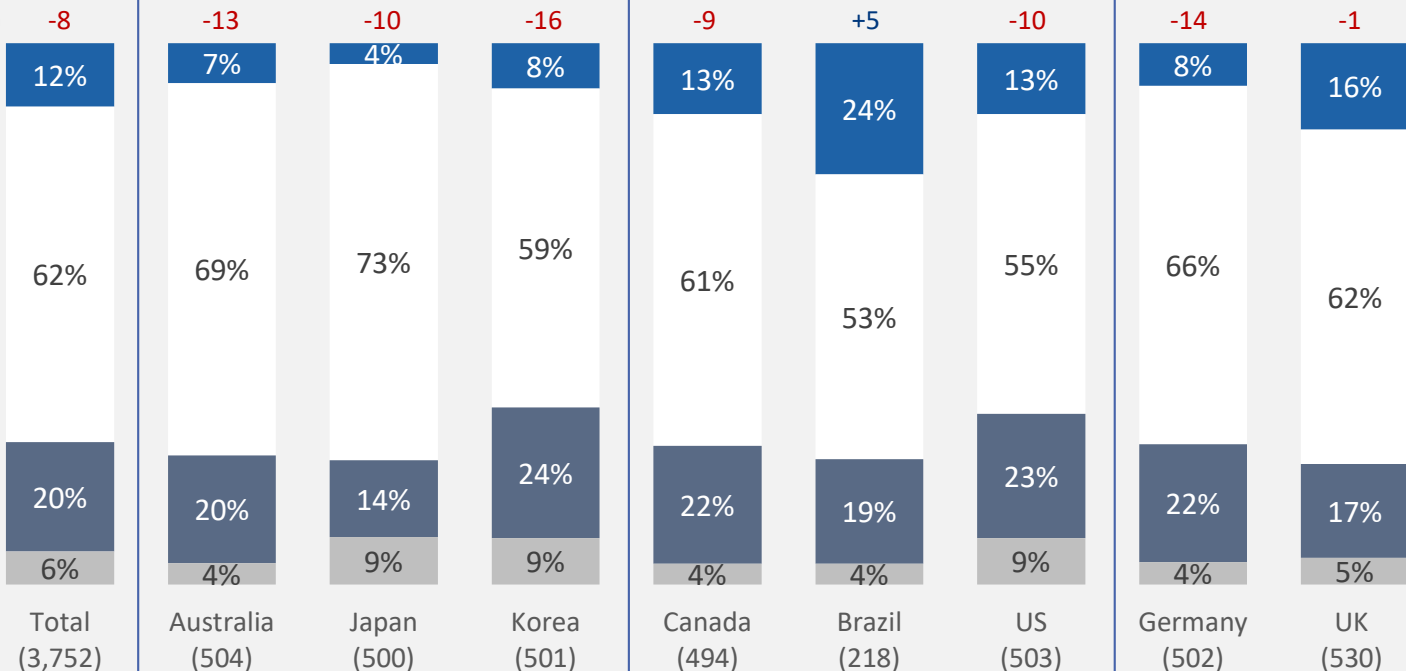
While Covid-19 is generally less top of mind now, overall, trust is again more likely to be a net negative as a result of Covid-19; Brazil is the only country, where on a net basis, respondents claim that their level of trust has increased.



Average Change in Trust*

Net Change Trust Index

- Trust More
- Trust the Same
- Trust Less
- Don't Know











Net Change Trust Index = % Trust More – % Trust Less

*Scores are an average across the 15 industries/organizations analyzed

While for the majority there continues to be no impact, the proportion of those who trust less is somewhat rising.

Average Change in Trust*

	Total								
Net Change Trust Index	2022 -8 vs. 2020 -4	-13 -12	-10 -2	-16 -16	-9 -6	+5 +8	-10 -6	-14 -7	-1 +1
% Trust More	2022 12% vs. 2020 --	7% -5%	4% -2%	8% -8%	13% +1%	24% +7%	13% -1%	8% +2%	16% +4%
% Trust Same	2022 62% vs. 2020 -5%	69% -3%	73% +1%	59% -6%	61% -6%	53% -6%	55% -4%	66% -10%	62% -4%
% Trust Less	2022 20% vs. 2020 +5%	20% +8%	14% --	24% +8%	22% +7%	19% -1%	23% +5%	22% +9%	17% +2%

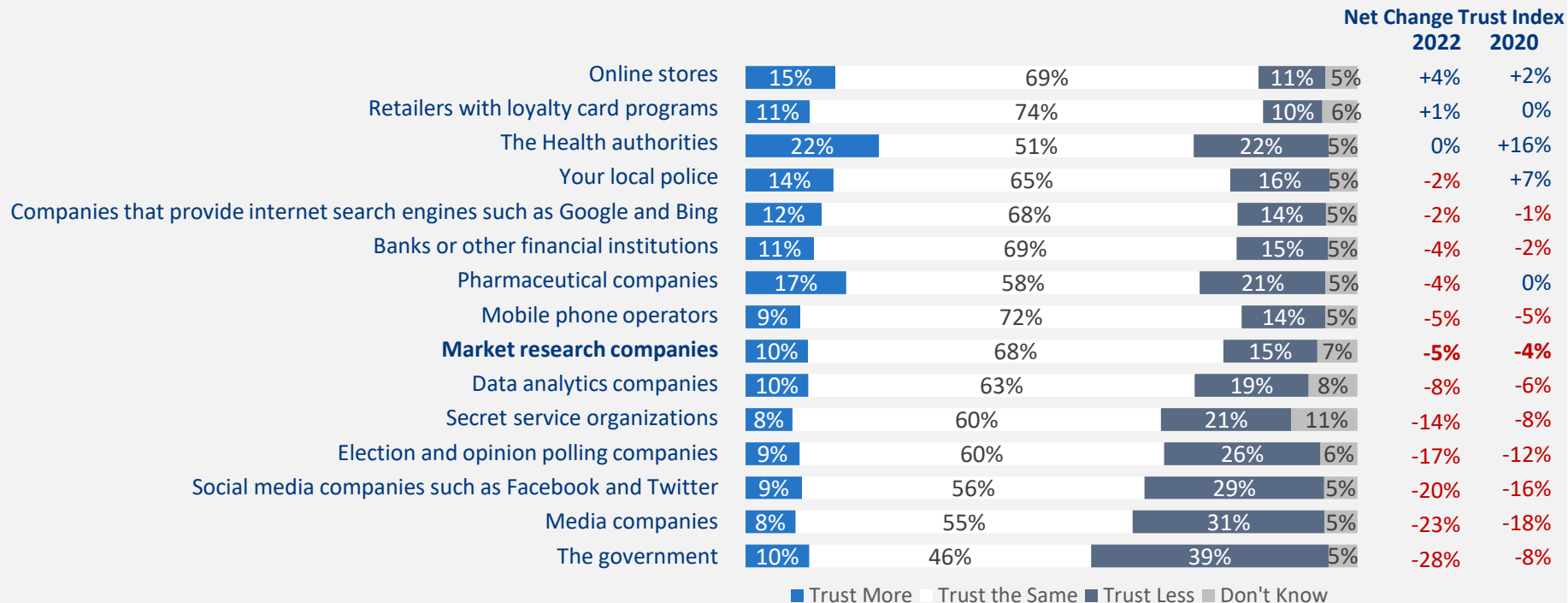
Net Change Trust Index = % Trust More – % Trust Less

*Scores are an average across the 15 industries/organizations analyzed



Net trust in health authorities and the government, as a result of Covid-19, has declined significantly vs. 2020.

Change in Level of Trust by Organizations/Professionals

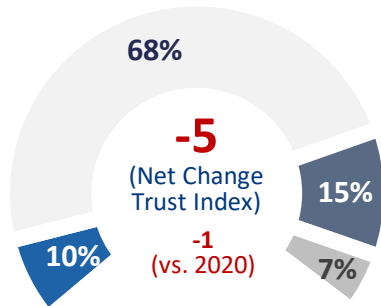


Net Change Trust Index = % Trust More – % Trust Less

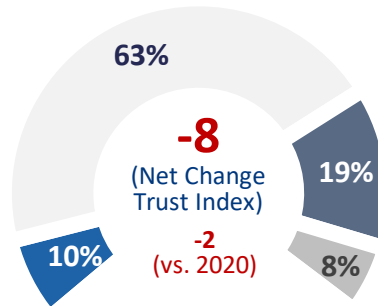


Across the “insights space,” Covid-19 continues to have the most negative impact on trust in election and opinion polling.

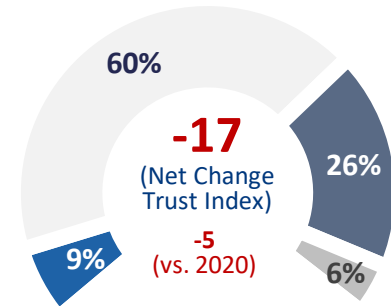
Trust Change in Market Research



Trust Change in Data Analytics



Trust Change in Election and Opinion Polling



- Trust More
- Trust the Same
- Trust Less
- Don't know

Net Change Trust Index = % Trust More – % Trust Less

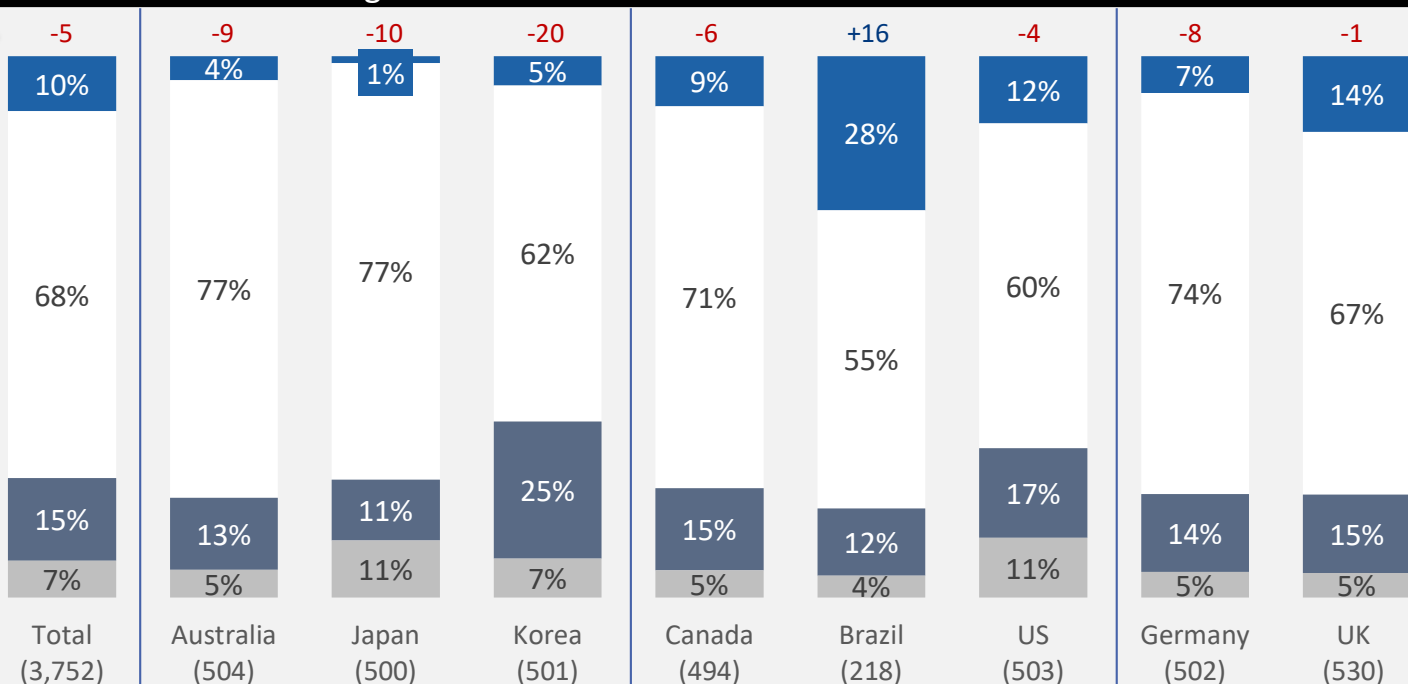
Outside of Brazil, the impact of Covid-19, while again, mostly muted, is more likely to be negative than positive.



Change in Trust in Market Research

Net Change Trust Index

- Trust More
- Trust the Same
- Trust Less
- Don't Know











Net Change Trust Index = % Trust More – % Trust Less



The impact of Covid-19 on trust in market research is most likely to be felt in Australia and Korea on the negative side and in Brazil on the positive side.

Change in Trust in Market Research - Trended to 2020

	Total								
Net Change Trust Index	2022 -5 vs. 2020 -1	-9 -5	-10 -3	-20 -8	-6 -1	+16 +9	-4 +2	-8 -3	-1 +2
% Trust More	2022 10% vs. 2020 +2%	4% -2%	1% -3%	5% -2%	9% +3%	28% +8%	12% +2%	7% +4%	14% +4%
% Trust Same	2022 68% vs. 2020 -5%	77% -3%	77% +1%	62% -7%	71% -6%	55% -7%	60% -4%	74% -9%	67% -4%
% Trust Less	2022 15% vs. 2020 +2%	13% +3%	11% --	25% +6%	15% +4%	12% -1%	17% +1%	14% +6%	15% +2%

Net Change Trust Index = % Trust More – % Trust Less

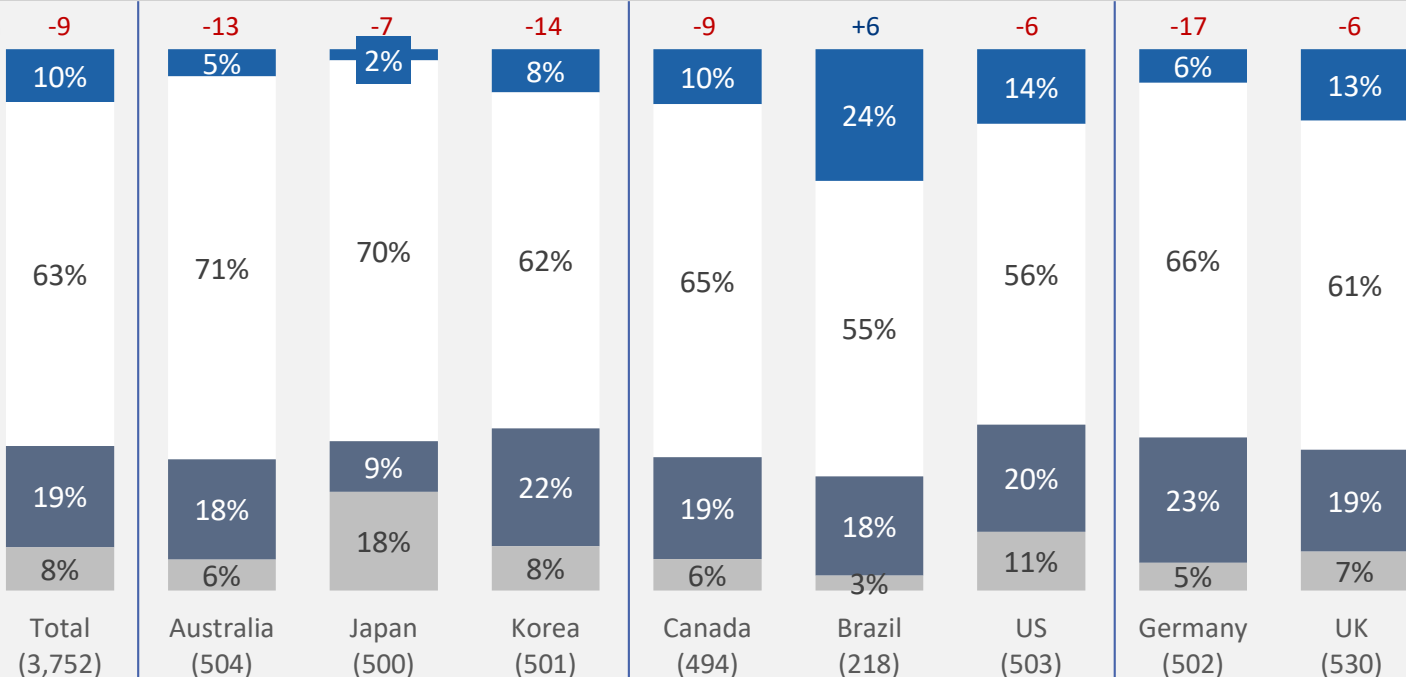
Again, except for Brazil, the impact of Covid-19 is more likely to be negative than positive.



Change in Trust in Data Analytics

Net Change Trust Index









- Trust More
- Trust the Same
- Trust Less
- Don't Know



Net Change Trust Index = % Trust More – % Trust Less

The impact of Covid-19 on trust in data analytics compared to 2020 is more negative in Australia, Korea, Canada, and Germany.

Change in Trust in Data Analytics - Trended to 2020

	Total								
Net Change Trust Index	2022 -9 vs. 2020 -3	-13 -7	-7 -1	-14 -10	-9 -5	+6 +5	-6 +3	-17 -6	-6 +4
% Trust More	2022 10% vs. 2020 +1%	5% -1%	2% -3%	8% -5%	10% +2%	24% +7%	14% +4%	6% +3%	13% +5%
% Trust Same	2022 63% vs. 2020 -6%	71% -5%	70% +2%	62% -3%	65% -8%	55% -9%	56% -5%	66% -10%	61% -6%
% Trust Less	2022 19% vs. 2020 +4%	18% +6%	9% -1%	22% +5%	19% +7%	18% +2%	20% +1%	23% +9%	19% +2%

Net Change Trust Index = % Trust More – % Trust Less

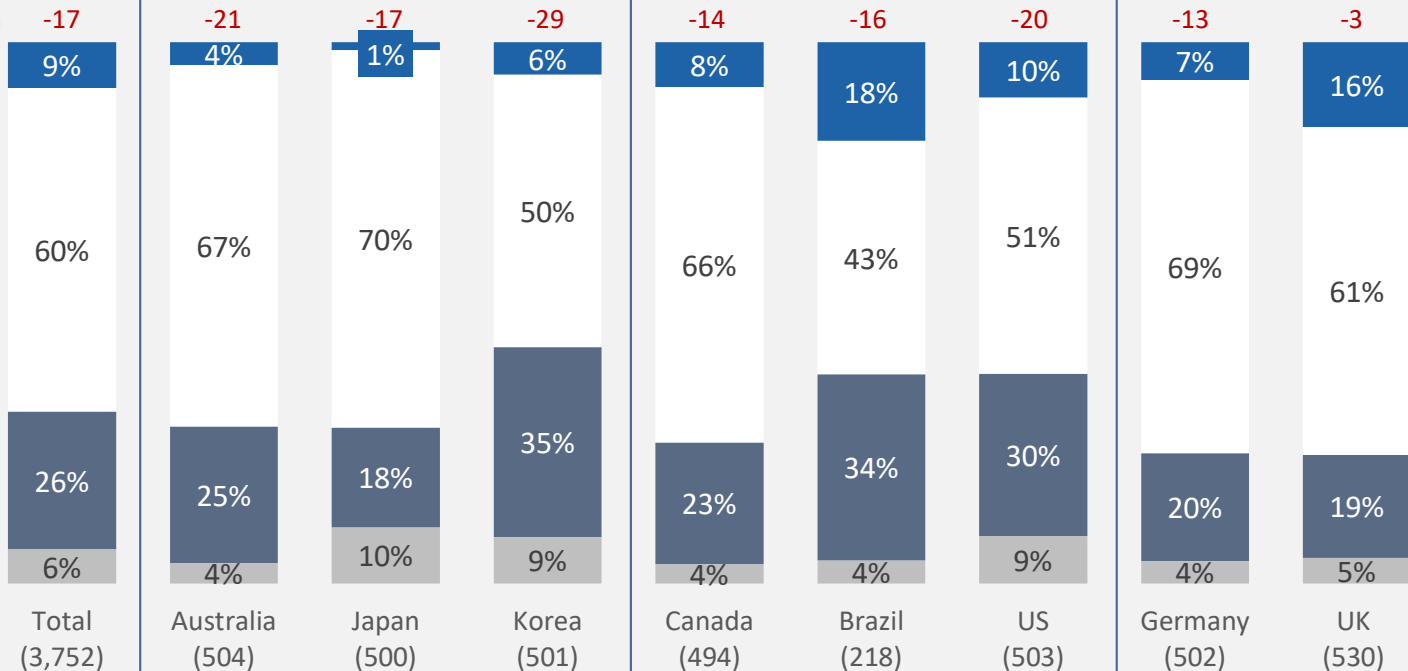
Covid-19 has had a negative impact on trust of election and opinion polling companies.



Change in Trust in Election and Opinion Polling

Net Change Trust Index









- Trust More
- Trust the Same
- Trust Less
- Don't Know



Net Change Trust Index = % Trust More – % Trust Less

The negative impact is up in Australia, Korea, and Germany, and while still a net negative in Brazil, more now indicate they are trusting.

Change in Trust in Election and Opinion Polling - Trended to 2020

	Total								
Net Change Trust Index	2022 -17 vs. 2020 -5	-21 -17	-17 -5	-29 -9	-14 -4	-16 +8	-20 -3	-13 -6	-3 --
% Trust More	2022 9% vs. 2020 +2%	4% -2%	1% -3%	6% -2%	8% +3%	18% +9%	10% +1%	7% +4%	16% +5%
% Trust Same	2022 60% vs. 2020 -8%	67% -11%	70% -3%	50% -11%	66% -8%	43% -9%	51% -5%	69% -12%	61% -7%
% Trust Less	2022 26% vs. 2020 +7%	25% +15%	18% +2%	35% +7%	23% +8%	34% +1%	30% +4%	20% +10%	19% +5%

Net Change Trust Index = % Trust More – % Trust Less

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