



**GLOBAL RESEARCH
BUSINESS NETWORK**

APRC • EFAMRO • ARIA • AMRA

Silver Partners



Global Trust Survey 2024

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

Focus on Australia

April 2024





Table of Contents

Read Me: I'm Important	3
Introduction	4
Partners	5
Thought Leadership	6
Background & Sample	10
Key Takeaways	12
Snapshot View of: Trust in and Impressions of Market Research	15
Level of Overall Trust	19
Believability that Market Research is Beneficial	31
Reactions to the Participant Experience	43
Personal Data Use	49
Protection & Use of Personal Data	57
Drivers of Trust in Market Research to Protect & Appropriately Use Personal data	69
How AI Has Impacted the Level of Trust	79



Read Me: I'm Important

COPYRIGHT

© 2024 GRBN

The copyright on this report (GRBN Global Trust Survey 2024 - Global Report) is owned by The Global Research Business Network (GRBN). Parts or the whole of this report may only be reproduced with written permission from GRBN. Parts or the whole of this report may only be distributed or transmitted if GRBN is clearly acknowledged as the copyright owner. In addition, when referencing material contained in this Handbook, the source “GRBN Global Trust Survey 2024 - Global Report © 2024 GRBN” must be acknowledged.

DISCLAIMER

The information provided within this report is for general informational purposes only. There are no representations or warranties, expressed or implied, about the completeness, accuracy, reliability, or suitability with respect to the information, products, services, or related graphics contained in this report for any purpose. Any use of this information is at your own risk. GRBN neither assumes nor accepts any liability to any party for any loss, damage, or disruption caused by applying the information shared in this report.



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.

And, as we move to deploy more and more AI solutions, we need to be aware that, currently at least, AI, on balance, decreases rather than increases the amount of trust the general public has in our sector.



Andrew Cannon

Executive Director, GRBN

andrew.cannon@grbn.org

Thanking our national association and corporate partners

National association partners

ADM.



Corporate partners

Silver sponsors



Bronze sponsors





Thought Leadership – By Angus Hunter, The Research Society

The Relevance of Trust

Trust is the cornerstone of market and social research. Trust is both a foundational principle and a critical operational element that influences the reliability and validity of data gathered. This importance is multifaceted, impacting research participants, the research community, our clients and the broader public.

At the core of trust in research is the ethical conduct expected of researchers. This involves obtaining informed consent, ensuring confidentiality, and handling data with integrity. When participants believe that their personal information is safe and that the research is conducted ethically, they are more likely to participate willingly and provide accurate, honest responses. This trust is not merely ethical but practical; it directly affects the quality and depth of data collected.

Additionally, public trust in market research affects how research findings are received and acted on, particularly in the government and social context. Trust in the research community encourages

engagement with findings and greater acceptance of evidence-based policy changes.

As we increasingly integrate artificial intelligence and synthetic data into market research, the need for trust becomes even more pronounced and the importance of GRBN's study is amplified. AI and synthetic data offer the potential to vastly expand the scope and efficiency of research by generating insights from large data sets at unprecedented speeds. However, these technologies also introduce new complexities and ethical considerations.

Furthermore, the use of synthetic data, while valuable for protecting privacy and enhancing data availability, raises questions about the authenticity and representativeness of the information. Ensuring that synthetic data sets are truly reflective of real-world populations requires meticulous validation and testing, which must be transparently communicated to maintain credibility. The risk of biases being encoded into AI systems or perpetuated by synthetic datasets is a significant concern that researchers must actively manage.



Thought Leadership – By Angus Hunter, The Research Society

The propensity for AI to negatively impact trust in the research industry here in Australia is evidenced in the report findings. As market research continues to evolve with these technological advancements, establishing robust ethical guidelines and maintaining transparency in AI and data synthesis processes are crucial. Trust in this context not only supports the integrity and acceptance of research findings but also safeguards against the misuse of powerful technologies.

Building and maintaining this trust will require concerted efforts to educate stakeholders about AI and synthetic data methodologies, engage in open dialogue about the limitations and potential biases of these technologies, and implement rigorous oversight and ethical review processes.

These steps are essential to ensure that, as market research becomes more technologically advanced, it remains a reliable and trusted tool for decision-making.

The Research Society is pleased to continue its partnership with GRBN on this important work and we congratulate Andrew and his team on producing another thought-provoking study. We also take this opportunity to thank Lisa Salas and the team at Ovation for continuing to provide the fieldwork for this research here in Australia.

Angus Hunter
CEO
The Research Society



**The
Research
Society**



Thought Leadership – LISA SALAS, OVATION RESEARCH

Navigating the Crossroads: Trust in Market Research and the AI Revolution in Australia

In the age of data-driven decision-making and technological advancement, the landscape of market research is undergoing a profound transformation. Australia finds itself at a crossroads, where the convergence of market research and artificial intelligence (AI) raises critical questions about trust, data protection, and privacy in the eyes of the public.

Trust is the foundation of successful market research. It is the currency that underpins the relationship between researchers and participants, consumers, and businesses. However, in an era marked by data breaches, privacy scandals, and algorithmic biases, trust is not easily earned nor maintained.

Trust in market research hinges on transparency, integrity, and accountability. There is a growing expectation for research firms and businesses to be forthright about their data collection practices, methodologies, and the purposes for which data is being utilised.

Any perceived deviation from these principles risks eroding trust and credibility.

AI, with its capabilities in data analysis, predictive modelling, and automation, holds immense promise for revolutionising market research in Australia. From sentiment analysis of social media posts to assistance in coding and data processing through automation, AI-powered tools offer unprecedented insights and efficiencies.

However, the integration of AI in market research also raises valid concerns among the public regarding data protection and privacy. The use of algorithms to process vast amounts of personal data can amplify existing privacy risks and exacerbate disparities in data protection. The fear of intrusive surveillance, data misuse, and loss of control over one's personal information is of great concern. As AI algorithms become more adept at analysing behavioral patterns and predicting consumer preferences, there is a growing unease about the extent to which individuals are being monitored and manipulated without their knowledge or consent. This fear is compounded by the perceived loss of control over one's personal information, as data is harvested and processed without transparent mechanisms for consent or oversight.



Thought Leadership – LISA SALAS, OVATION RESEARCH

As Australia navigates the intersection of trust, market research, and AI, several guiding principles must be embraced:

Transparency and Accountability: Businesses must adopt a culture of transparency, openly communicating their data practices and AI algorithms. Transparency builds trust and empowers individuals to make informed choices about their participation in research activities.

Ethical Use of AI: AI algorithms must be developed and deployed ethically, with careful consideration given to issues of fairness, bias, and discrimination. Mechanisms for auditing and assessing the ethical implications of AI systems should be implemented to mitigate potential harms.

Data Protection and Privacy: Robust data protection measures must be implemented to safeguard individuals' privacy rights throughout the research lifecycle. This includes obtaining explicit consent for data collection, anonymising sensitive information, and adhering to established privacy regulations such as the Australian Privacy Principles (APPs).

Empowering Data Literacy: Investing in public education and

awareness initiatives can empower individuals to understand the value of their data, the risks associated with data sharing, and the rights they have to control their personal information. An informed public is better equipped to navigate the complexities of the digital age.

Trust in market research and ethical AI use are essential and closely connected. As a profession, we can promote trust and innovation by focusing on transparency, ethical AI, and strong data protection. This benefits both businesses and participants alike. As we stand at the crossroads of technological advancement and societal values, let's move forward with integrity, accountability, and privacy in mind.

LISA SALAS

OVATION RESEARCH & TRS





Background & Sample

- The primary objective of the research 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 12th and 24th of February 2024.
- The report compares the results for 2024 to the 2022 Global Trust Survey, fieldwork for which was conducted in July 2022. Trended data is shown throughout the report, many times reported as the +/- in percentage point change in the 2024 data vs. 2022 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 & Sample (Cont'd)

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

	Country	Fieldwork Partners	Sample Size
	Australia	Ovation Research	1003
	Japan	Rakuten Insight	1000
	South Korea	PMI	1002
	New Zealand (NZ)	Ovation Research	501
	Canada	Quest Mindshare	1000
	Mexico	Netquest / Offerwise / Question Pro	1051
	United States (US)	Innovate MR / Rakuten Insight	1006
	Germany	Bilendi	1000
	Spain	Bilendi	1000
	United Kingdom (UK)	Opinium	1000

Fieldwork Management, programming and data processing: InnovateMR
 Reporting: RTi Research. Translations: Empower MR, Multilingual Connections

KEY TAKEAWAYS





Key Takeaways

- ✓ Consumer trust in market research companies remains average relative to other types of organizations in Australia. That said, it fares better than data analytics or election & polling companies.
- ✓ The value market research brings to businesses is recognized, but there's opportunity to boost perceptions as it relates to individuals.
- ✓ The survey experience can still be improved for Australians, in particular by decreasing the length of surveys.
- ✓ There continues to be widespread distrust in how industries, including market research, handle personal data.
- ✓ Australian consumers are highly skeptical of AI use in market research and express great distrust of companies touting its benefits.
 - This is especially true regarding the use of AI chatbots and avatars for online interviews, particularly when dealing with sensitive topics.





Key Changes 2024 vs. 2022

- ✓ Public trust in organizations declined slightly in Australia and most other countries.
 - Trust in **market research companies** held relatively steady.
 - While net trust in **data analytics companies** is negative in Australia, it's unchanged vs. 2022.
 - Trust in **election & polling companies** declined in South Korea but edged slightly higher in Australia, Japan and the US.
- ✓ Across all countries, consumers perceived a greater personal benefit from market research.
- ✓ There's universal erosion of trust in how organizations handle personal data in Australia.
 - This distrust is evident in most countries across the “insights space” (market research, data analytics and election & polling companies).



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



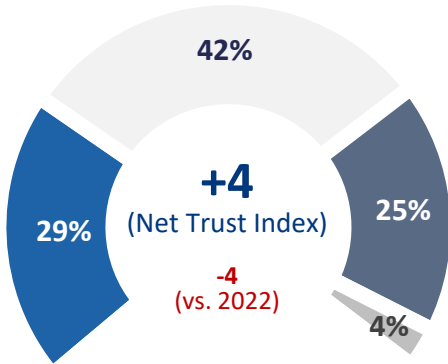


While public trust in market research companies remains a net positive in Australia, it slightly declined vs. 2022. Data privacy practices continue to be a growing concern.



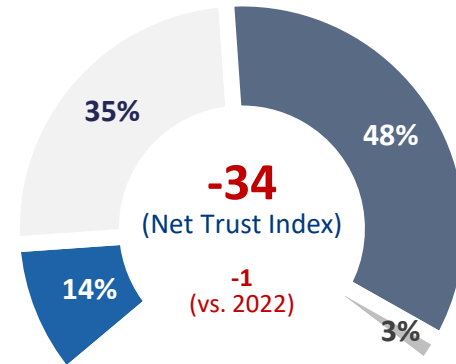
Australia

Overall Trust of Market Research Companies



Trust of Market Research Companies to Protect & 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 +2 (Market Research companies ranked 7th of 15)

Personal Data Trust Net Trust Index (NTI): Across the 15 industries/organizations analyzed, the average NTI was -16 (Market Research companies ranked 10th of 15)

Base: Version 1 Respondents (500)

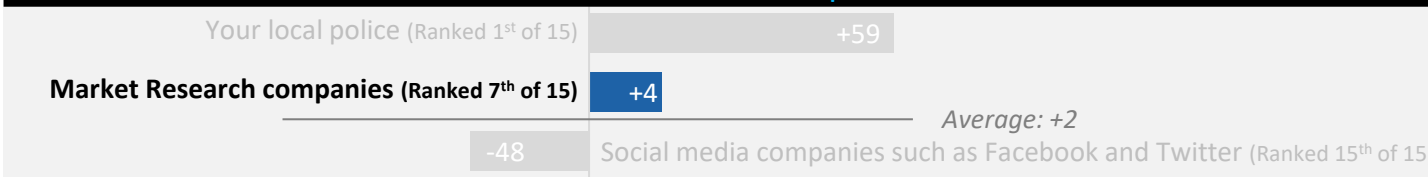
Base: Version 2 Respondents (503)



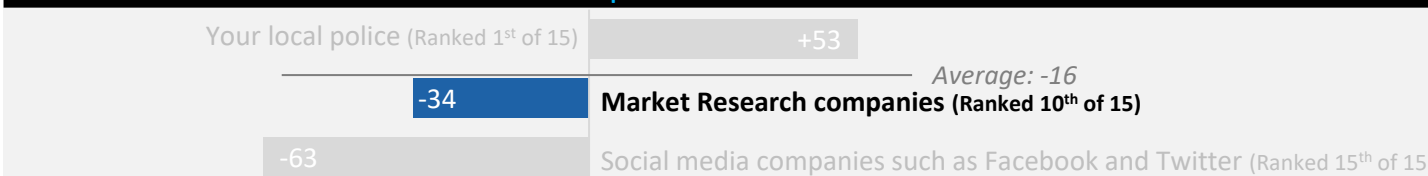
Compared to other surveyed organizations, market research companies rank in the middle for perceived trust in Australia but slightly lower in terms of perceived use of personal data.



Overall Trust of Market Research Companies – Net Trust Index



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



Net Trust Index = % Trust – % Do Not Trust



Consumers see more personal value in market research now than in 2022, but data privacy concerns persist, at least in part due to a perceived lack of transparency.



Australia

23%

(+1% vs. 2022)

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

49%

(-1% vs. 2022)

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

22%

(+2% vs. 2022)

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

39%

(+5% vs. 2022)

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 (500)

Base: Version 2 Respondents (503)

**LEVEL OF
OVERALL TRUST**

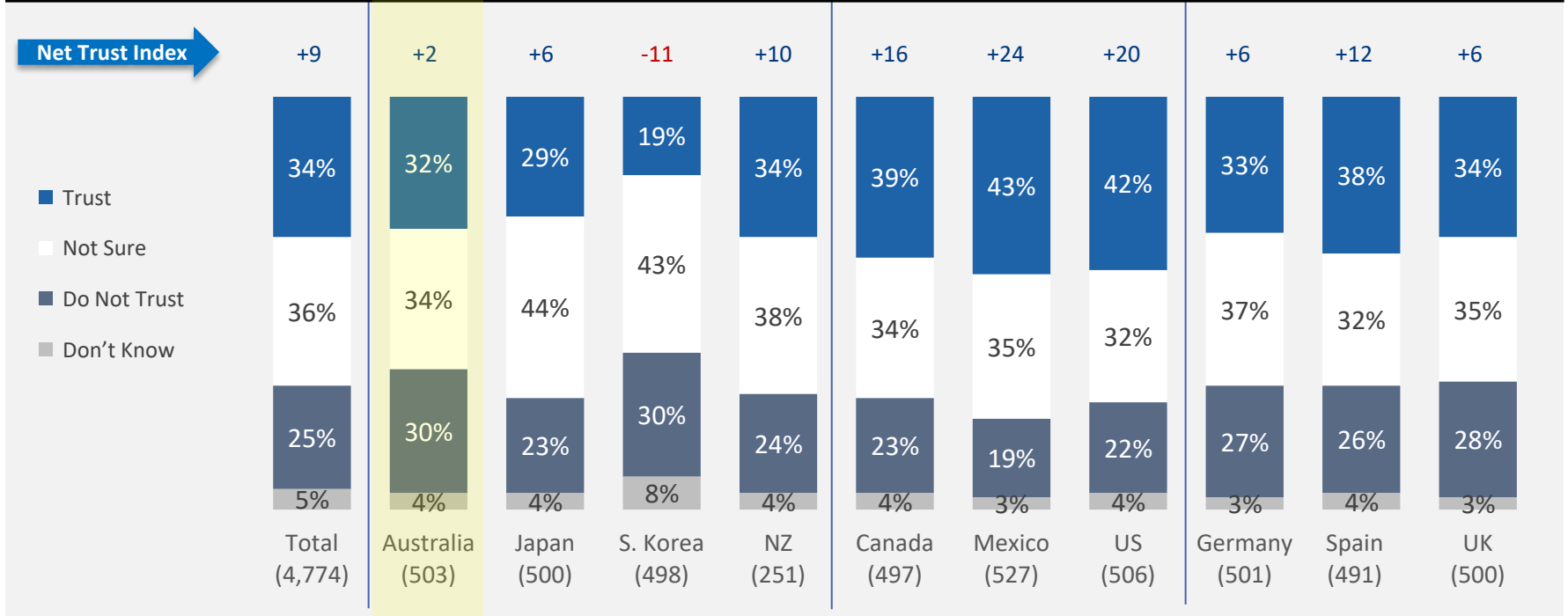




While there's a foundational level of trust in organizations/professionals around the world, most countries also exhibit a sizeable level of distrust. In this regard, Australia is below the global average.



Average Level of Trust Across Organizations/Professionals†










Net Trust Index = % Trust – % Do Not Trust

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



In Australia and most other countries, net trust in organizations dipped slightly.

Average Level of Trust Across Organizations/Professionals† - Trended to 2022

	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index →	2024	+6	+2	+6	-11	+16	+20	+6	+6
	vs. 2022	-3	-4	-2	-6	-4	+5	-1	-6
% Trust →	2024	33%	32%	29%	19%	39%	42%	33%	34%
	vs. 2022	--	--	--	+1%	-3%	+3%	--	-4%
% Do Not Trust →	2024	26%	30%	23%	30%	23%	22%	27%	28%
	vs. 2022	+2%	+4%	+2%	+7%	+1%	-2%	+1%	+2%

Net Trust Index = % Trust – % Do Not Trust

*Total based on comparable countries across waves.

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



Australians are still most trusting of law enforcement and health authorities. Market research companies rank in the middle, while media, social media and companies providing AI tools incur the most doubt.



Australia

Level of Trust by Organizations/Professionals



Net Trust Index = % Trust – % Do Not Trust

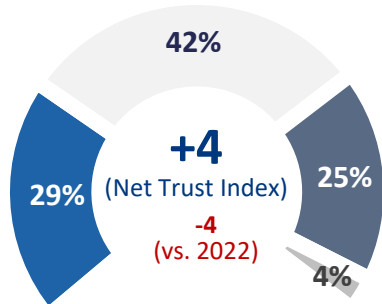


Market research companies continue to command the most trust across the “insights space,” though there’s a slight decline vs. 2022. While still negative overall, net trust in election & polling companies has grown since 2022.

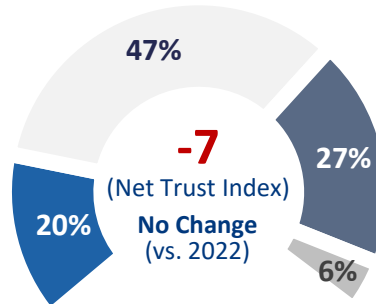


Australia

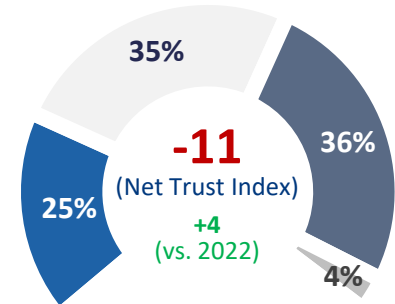
Trust in Market Research



Trust in Data Analytics



Trust in Election & Opinion Polling



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

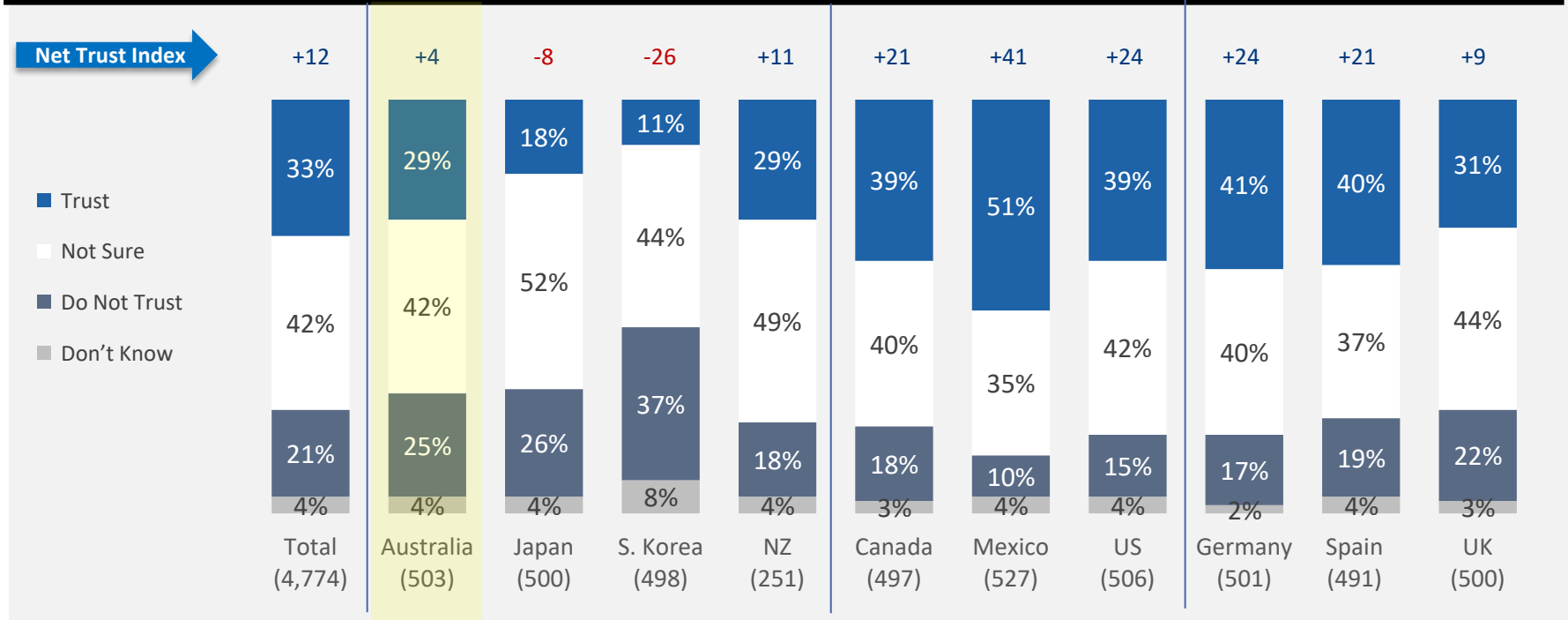
Net Trust Index = % Trust – % Do Not Trust



Trust in market research companies varies greatly by country but leans positive overall. In this regard, Australia falls below the global average.



Trust in Market Research










Net Trust Index = % Trust – % Do Not Trust



Trust in market research is fairly stable vs. 2022.

Trust in Market Research - Trended to 2022

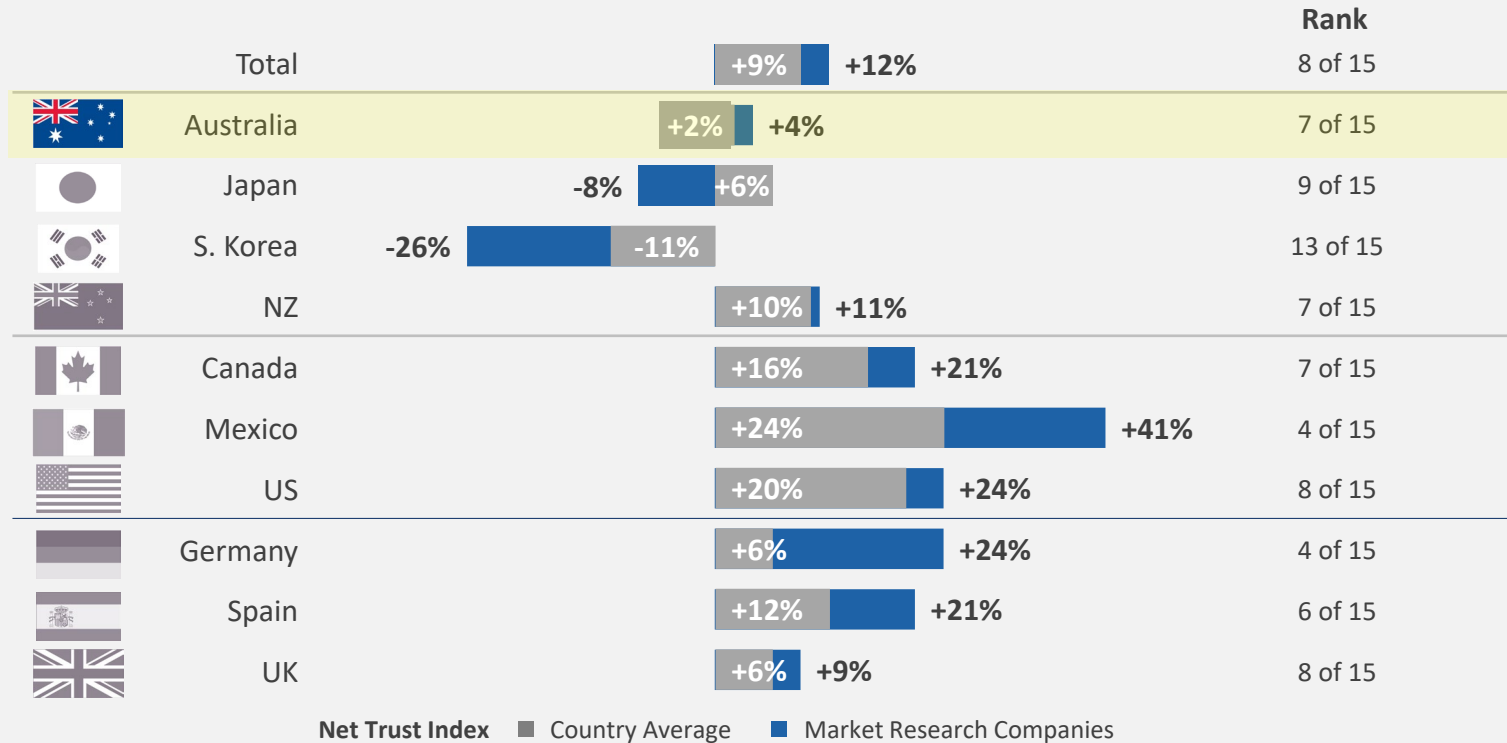
	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index →	2024	+7	+4	-8	-26	+21	+24	+24	+9
	vs. 2022	--	-3	+5	-14	+3	+2	+2	+1
% Trust →	2024	30%	29%	18%	11%	39%	39%	41%	31%
	vs. 2022	+1%	--	+3%	-2%	+3%	+2%	+5%	-2%
% Do Not Trust →	2024	23%	25%	26%	37%	18%	15%	17%	22%
	vs. 2022	+2%	+4%	-2%	+12%	+1%	--	+3%	-3%

Net Trust Index = % Trust – % Do Not Trust
*Total based on comparable countries across waves.



Trust in market research typically ranks in the middle of the pack globally – Australia aligns with the global average.

Trust in Market Research (vs. Country Average)



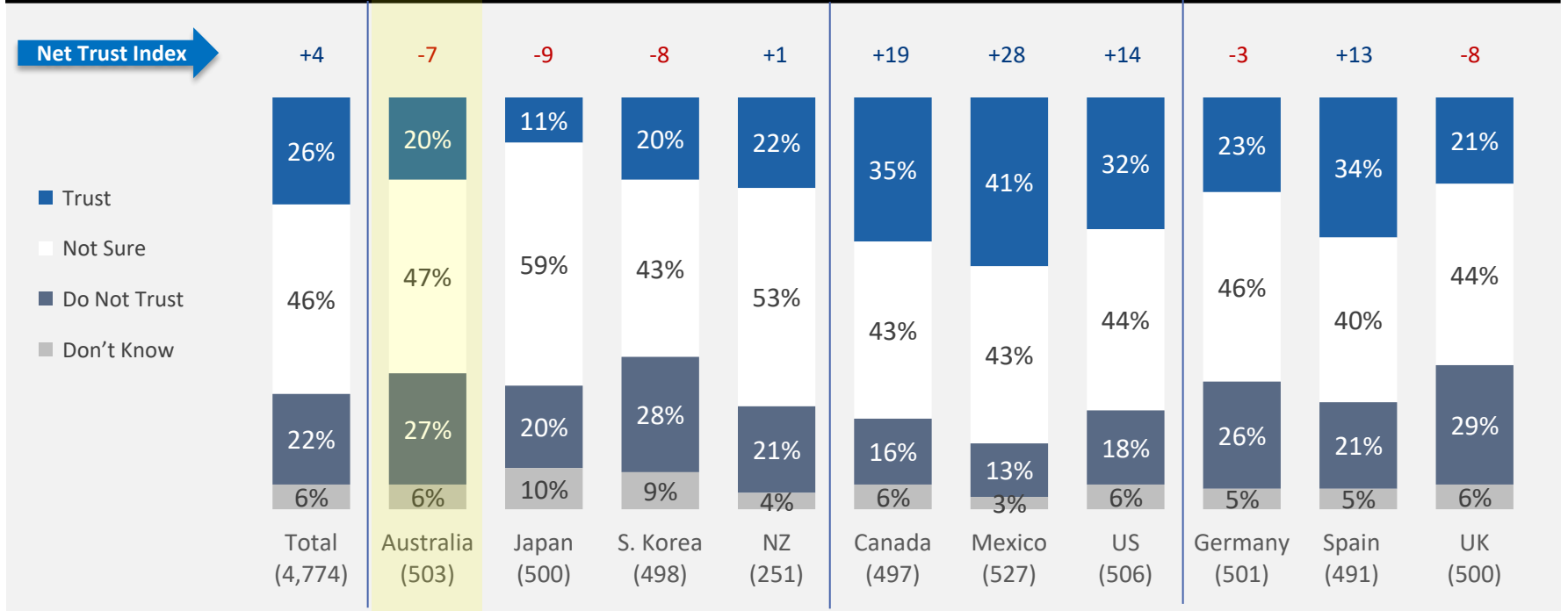
Net Trust Index = % Trust – % Do Not Trust



Trust in data analytics companies is strongest in Mexico, Canada, the US and Spain; whereas those in Japan, South Korea, the UK and Australia are the most skeptical.



Trust in Data Analytics










Net Trust Index = % Trust – % Do Not Trust



While net trust in data analytics is still negative in Australia, it's unchanged vs. 2022.

Trust in Data Analytics - Trended to 2022

	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index →	2024	--	-7	-9	-8	+19	+14	-3	-8
	vs. 2022	-2	--	-1	-9	+1	-2	+4	-6
% Trust →	2024	23%	20%	11%	20%	35%	32%	23%	21%
	vs. 2022	--	+1%	+2%	--	--	-1%	+1%	-6%
% Do Not Trust →	2024	23%	27%	20%	28%	16%	18%	26%	29%
	vs. 2022	+2%	+1%	+3%	+9%	-1%	+2%	-3%	--

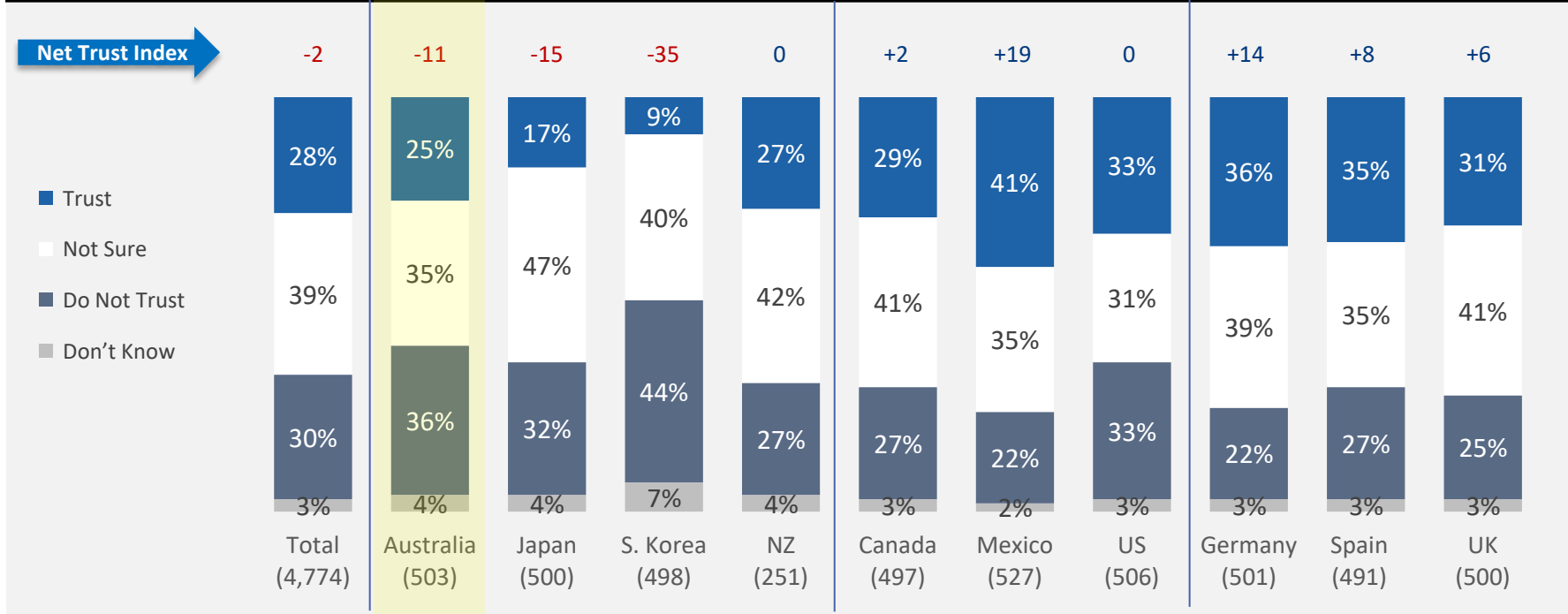
Net Trust Index = % Trust – % Do Not Trust
 *Total based on comparable countries across waves.



On a net basis, trust in election & polling is strongest in Mexico and Germany but weakest in South Korea, Japan and Australia.



Trust in Election & Opinion Polling










Net Trust Index = % Trust – % Do Not Trust



Trust in election and polling dropped significantly in South Korea and slightly in Canada; whereas Australia, Japan and the US moved in a positive direction.

Trust in Election & Opinion Polling - Trended to 2022

	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index →	2024	-6	-11	-15	-35	+2	--	+14	+6
	vs. 2022	-1	+4	+5	-12	-5	+5	-3	--
% Trust →	2024	26%	25%	17%	9%	29%	33%	36%	31%
	vs. 2022	+1%	+5%	+3%	-1%	-5%	+4%	+1%	-3%
% Do Not Trust →	2024	31%	36%	32%	44%	27%	33%	22%	25%
	vs. 2022	+1%	+1%	-2%	+11%	--	-1%	+4%	-3%

Net Trust Index = % Trust – % Do Not Trust
 *Total based on comparable countries across waves.

**BELIEVABILITY THAT
MARKET RESEARCH
IS BENEFICIAL**





In Australia, the value of market research is still more apparent for businesses than for individuals. That said, perceived benefits towards the latter have grown vs. 2022.



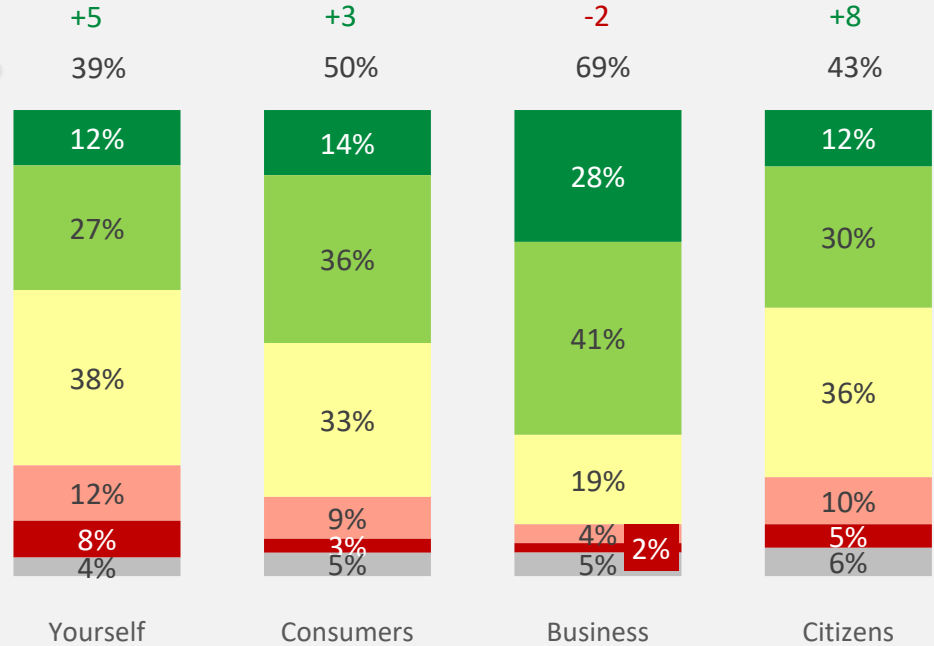
Australia

Extent Market Research is Perceived to be Beneficial



- 5 – Benefits completely
- 4
- 3
- 2
- 1 – Does not benefit at all
- Don't Know

Vs. 2022
Top 2 Box

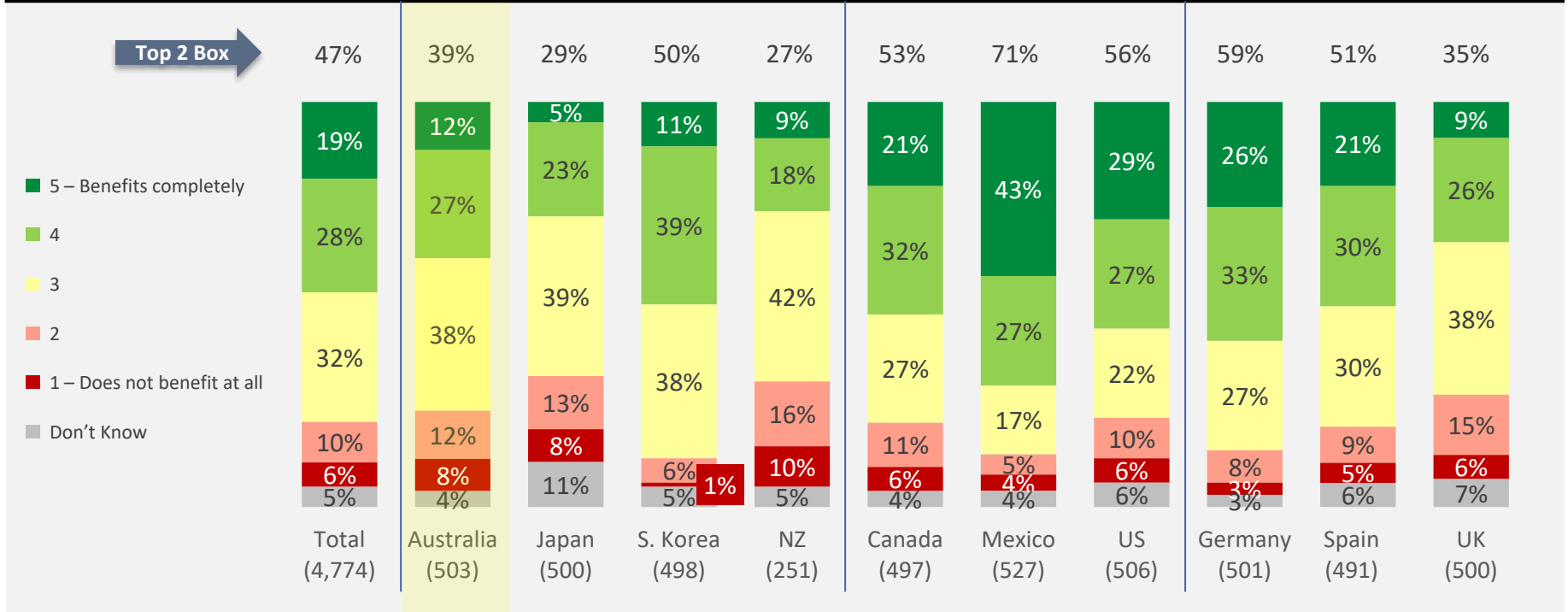




Overall, less than half feel that market research benefits them – this negative sentiment is driven by those in Australia, Japan, New Zealand, and the UK.



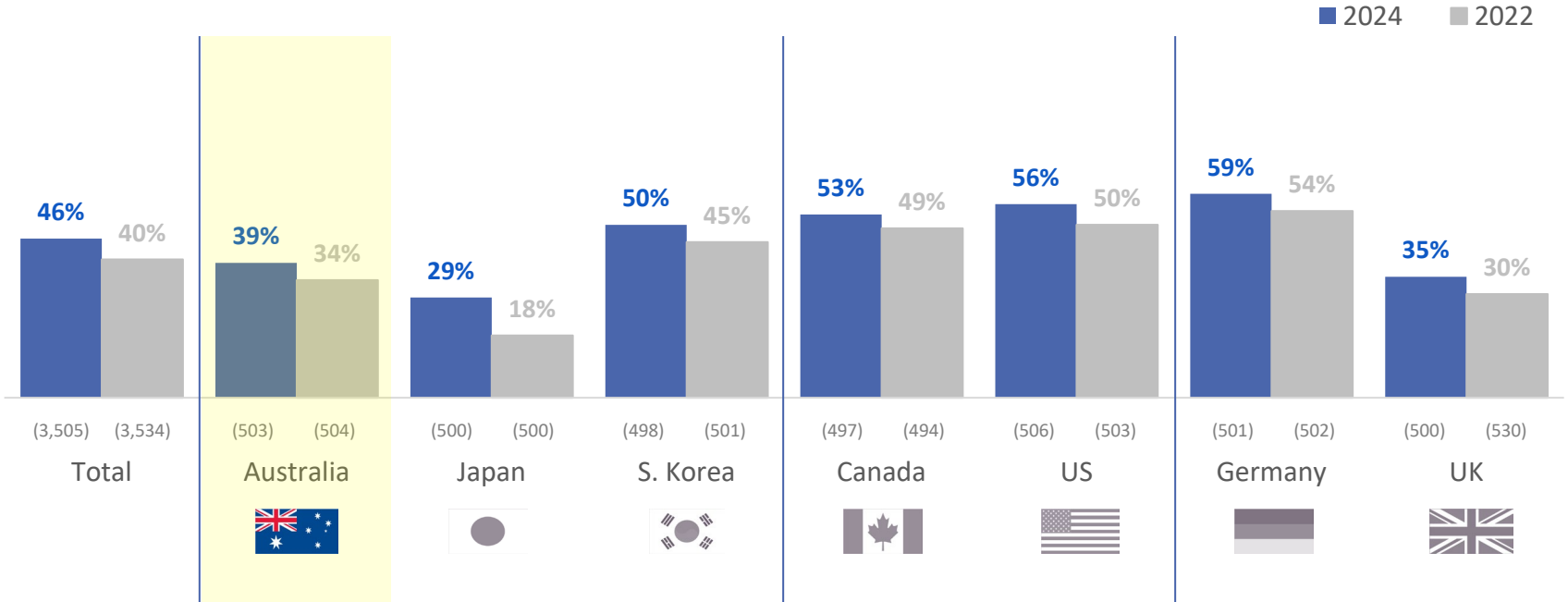
Extent Market Research is Perceived to be Beneficial to Yourself





The perceived benefit of market research to oneself improved globally vs. 2022.

Extent Market Research is Perceived to be Beneficial to Yourself (Top 2 Box %) - Trended to 2022

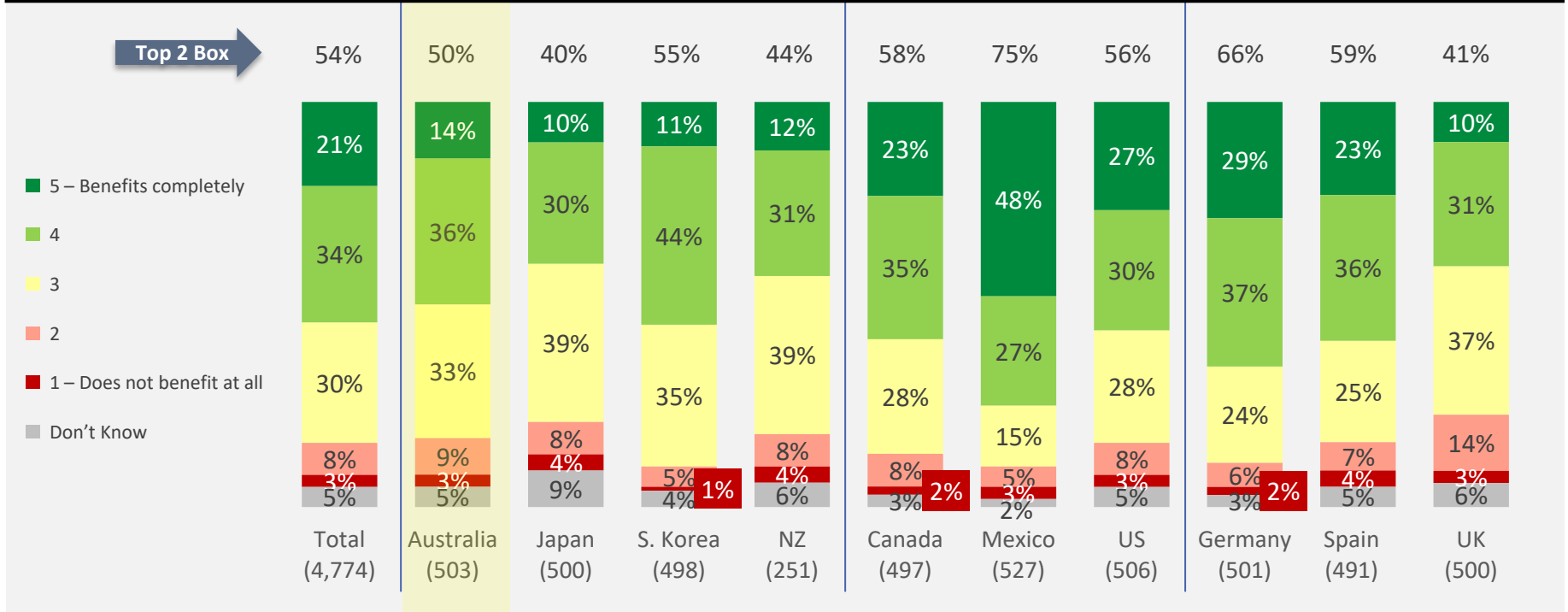




Most recognize some benefit of market research to consumers. In this aspect, Australia is slightly shy of the global average.



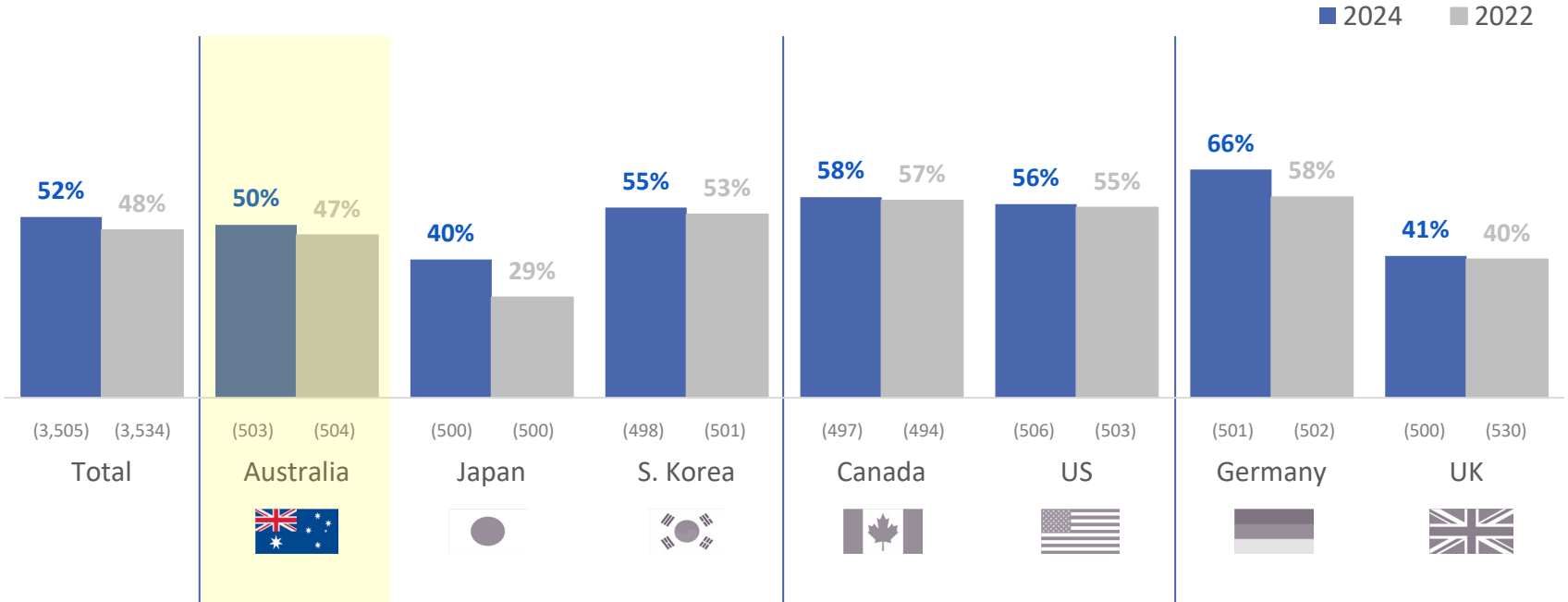
Extent Market Research is Perceived to be Beneficial to Consumers





Globally, the perceived benefit of market research to consumers remains positive.

Extent Market Research is Perceived to be Beneficial to **Consumers** (Top 2 Box %) - Trended to 2022

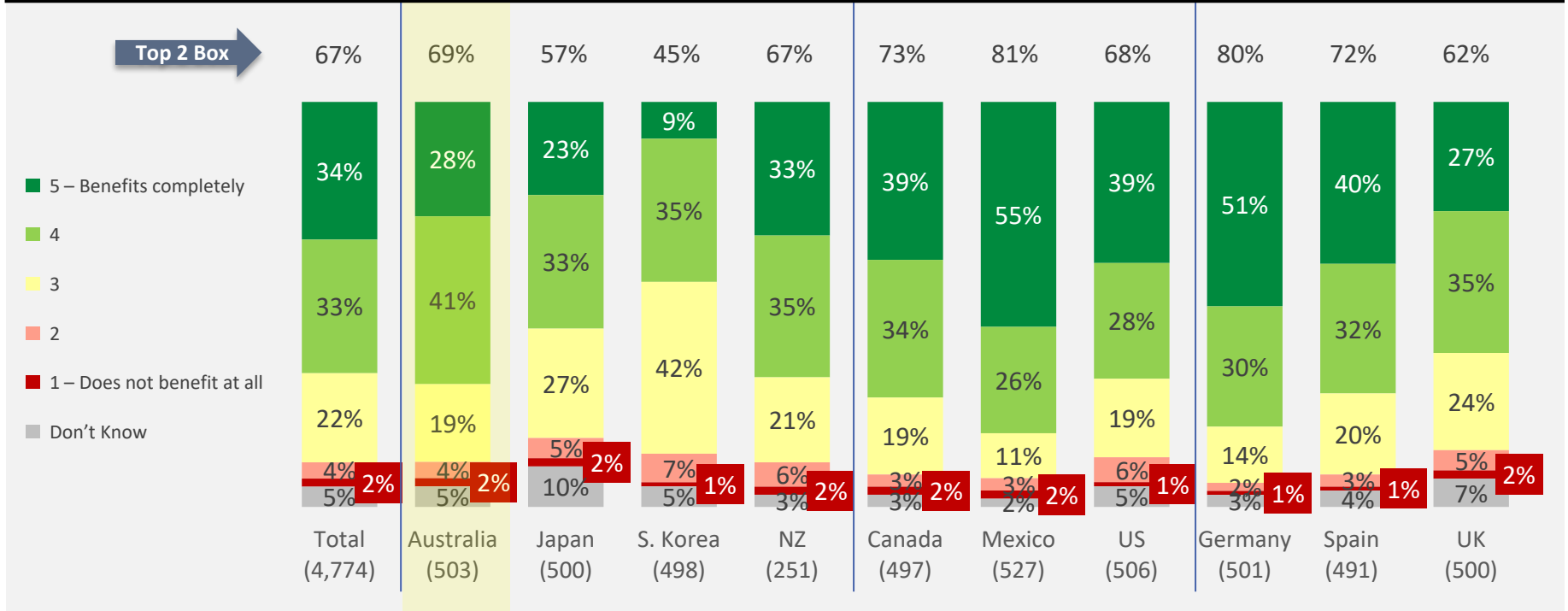




Many consider market research highly beneficial to businesses, with Australia performing similarly to the global average.



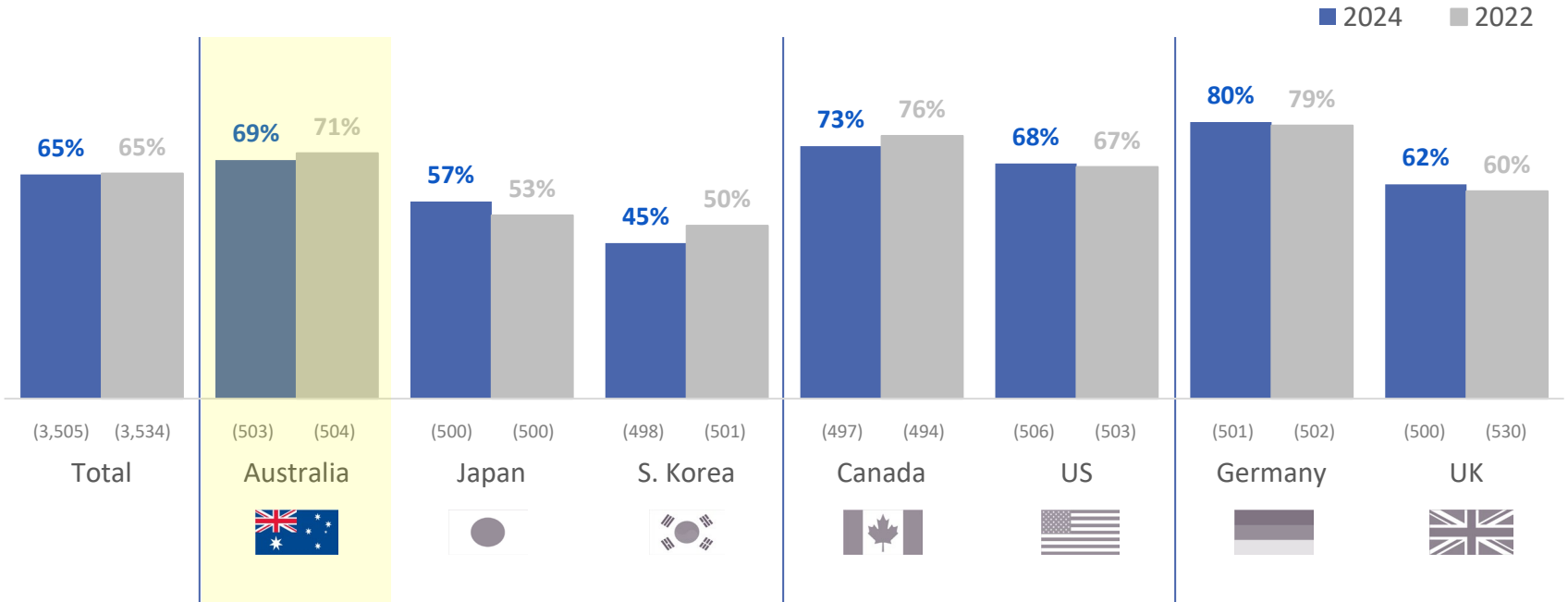
Extent Market Research is Perceived to be Beneficial to Business





Positive sentiment around the value of market research to businesses remains largely unchanged vs. 2022.

Extent Market Research is Perceived to be Beneficial to **Business** (Top 2 Box %) - Trended to 2022

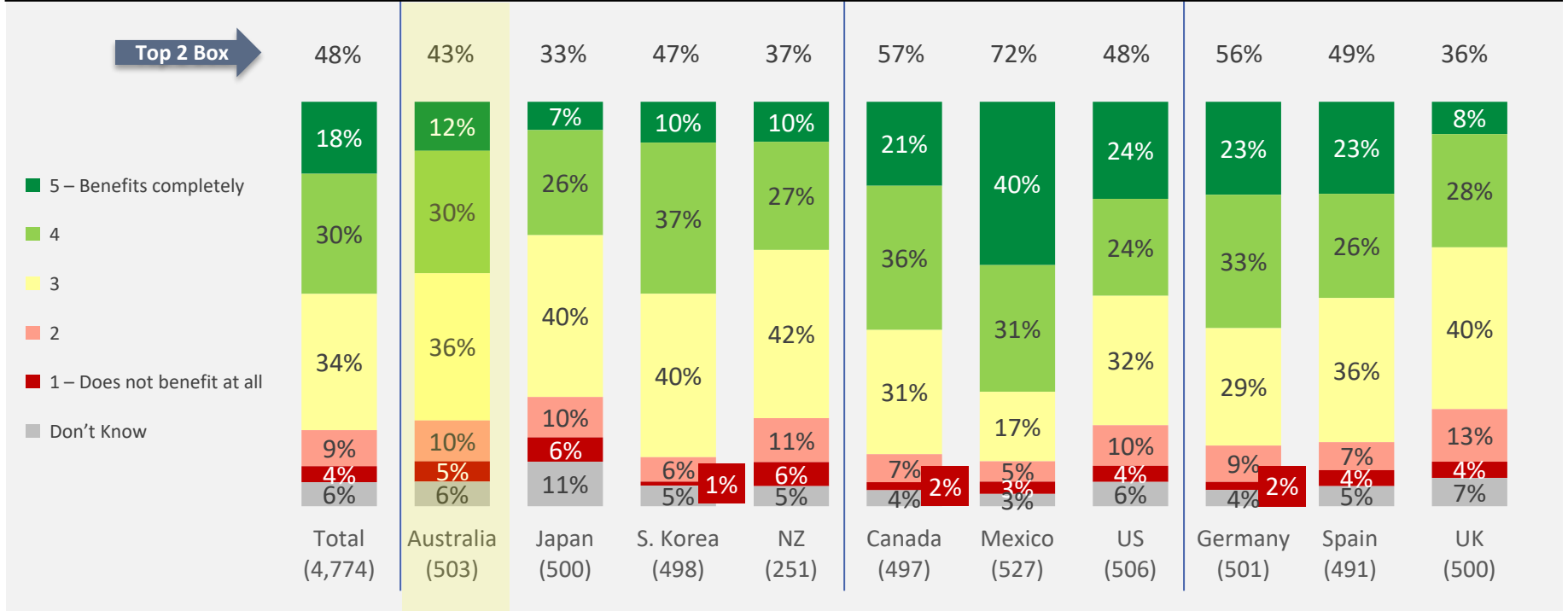




Less than half recognize the benefits of market research to citizens, with Australia falling slightly below the global average.



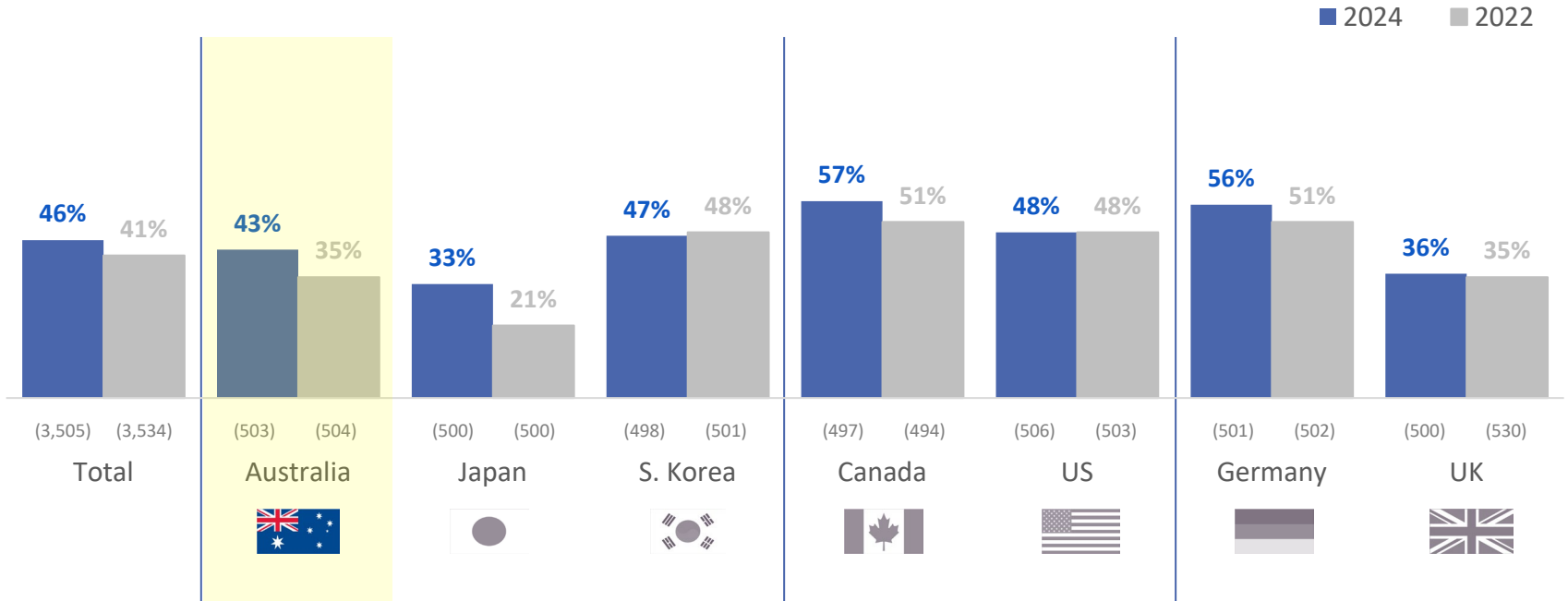
Extent Market Research is Perceived to be Beneficial to Citizens





Sentiment towards the benefits of market research to citizens rose in Australia, Japan, Canada and Germany.

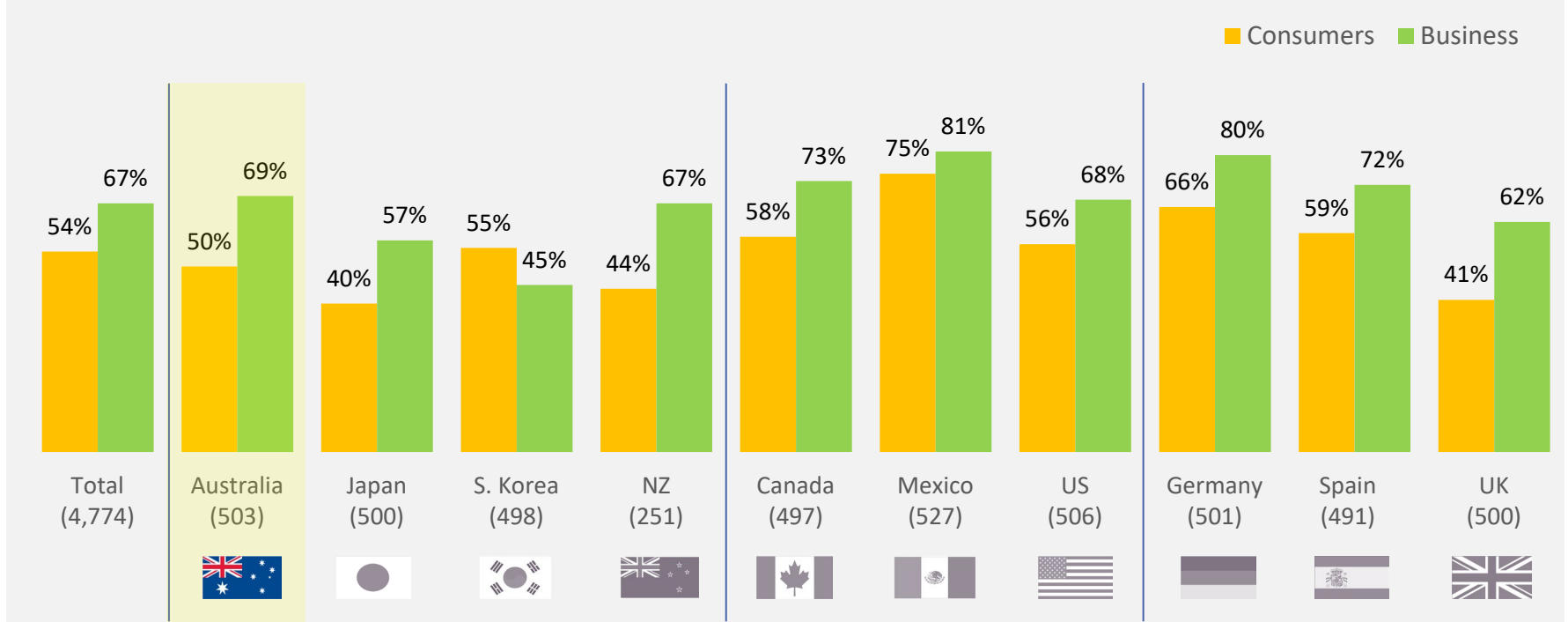
Extent Market Research is Perceived to be Beneficial to **Citizens** (Top 2 Box %) - Trended to 2022





Globally, market research is deemed more beneficial to businesses vs. consumers.

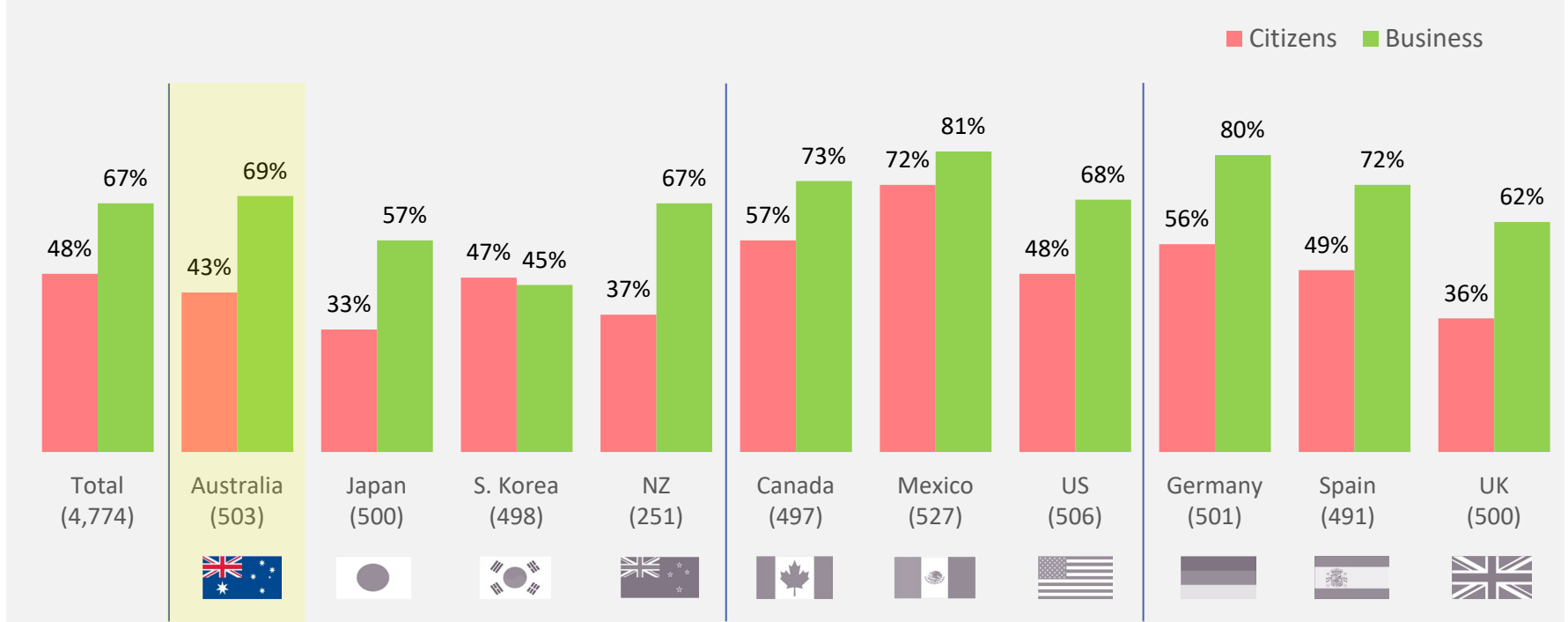
Extent Market Research is Perceived to be Beneficial to Consumers vs. Business (Top 2 Box)



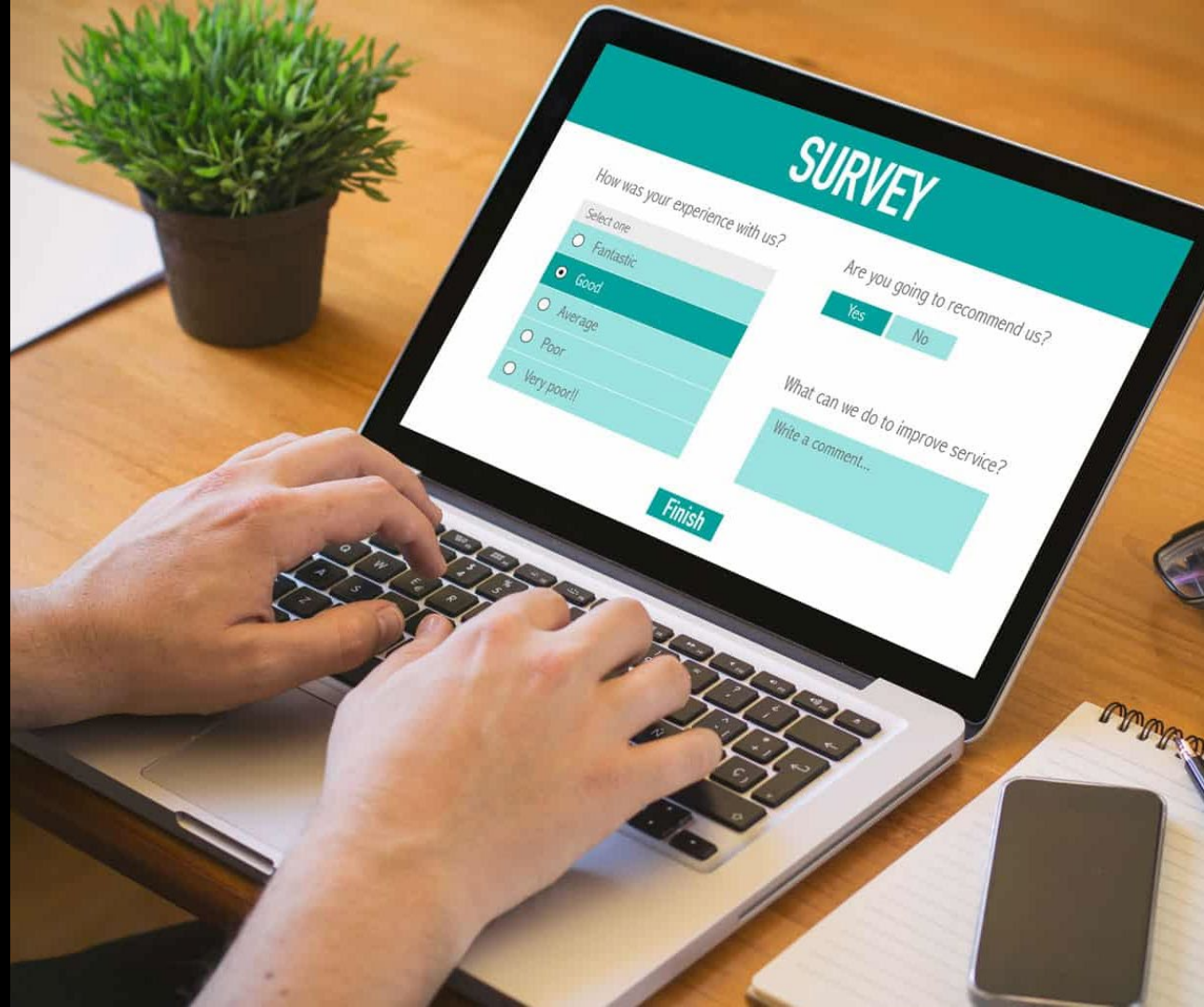


Likewise, market research is considered much more beneficial to businesses than to citizens on a global basis.

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



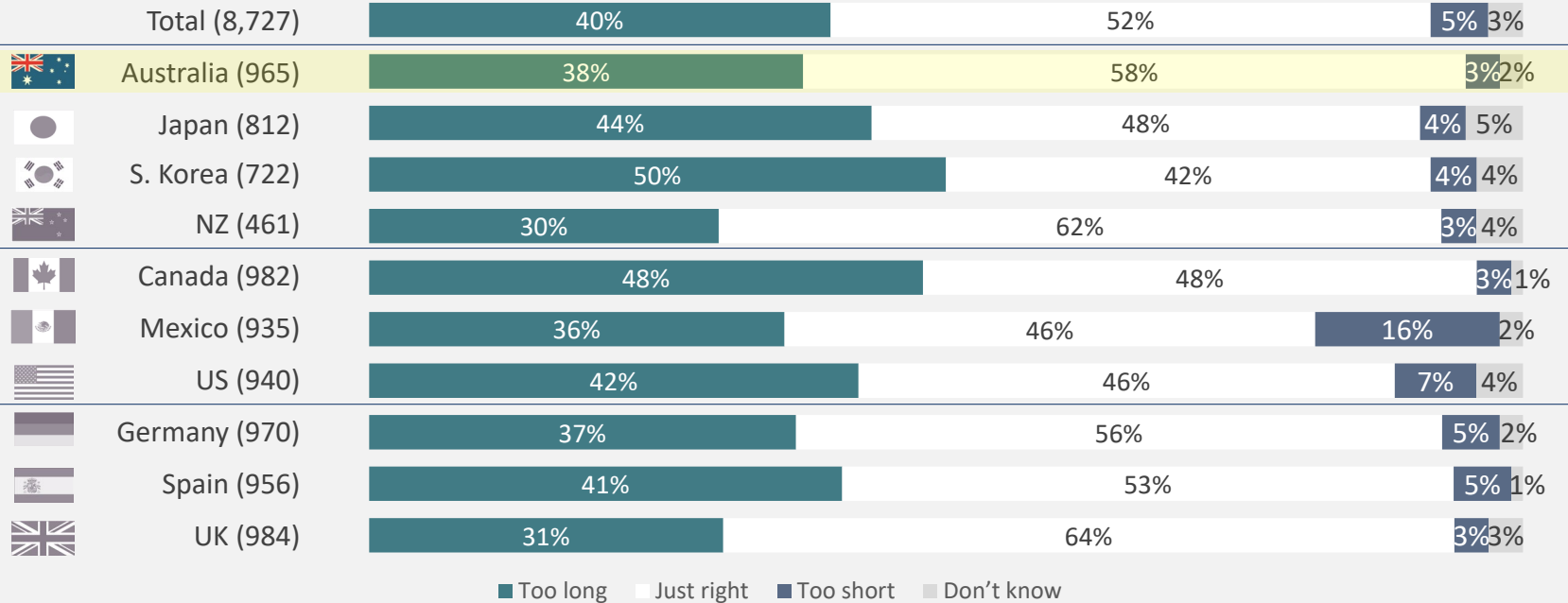
REACTIONS TO THE PARTICIPANT EXPERIENCE





While survey length is generally considered acceptable in Australia, there's a sizeable portion who would appreciate shorter surveys.

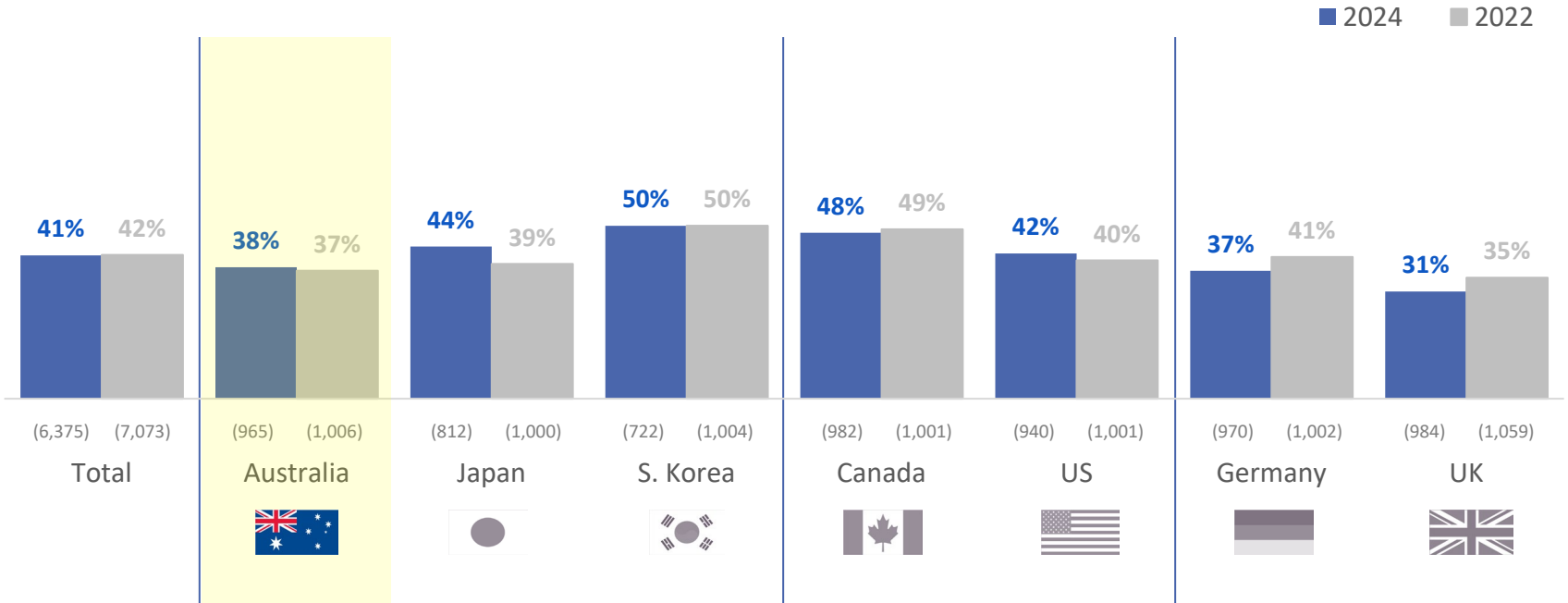
Perception of Survey Length





Survey length concerns are largely consistent with 2022.

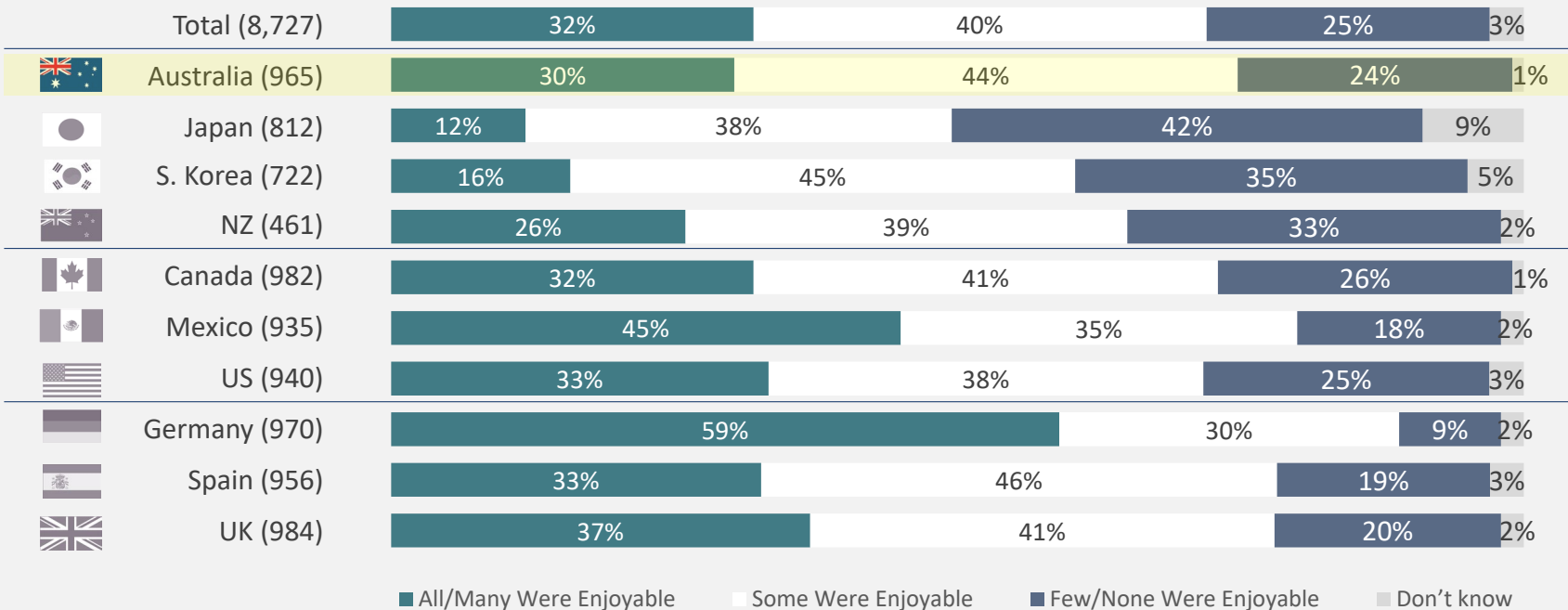
Perception of Survey Length (Too Long) - Trended to 2022





Survey enjoyment varies greatly across countries – Australia is on par with the global average.

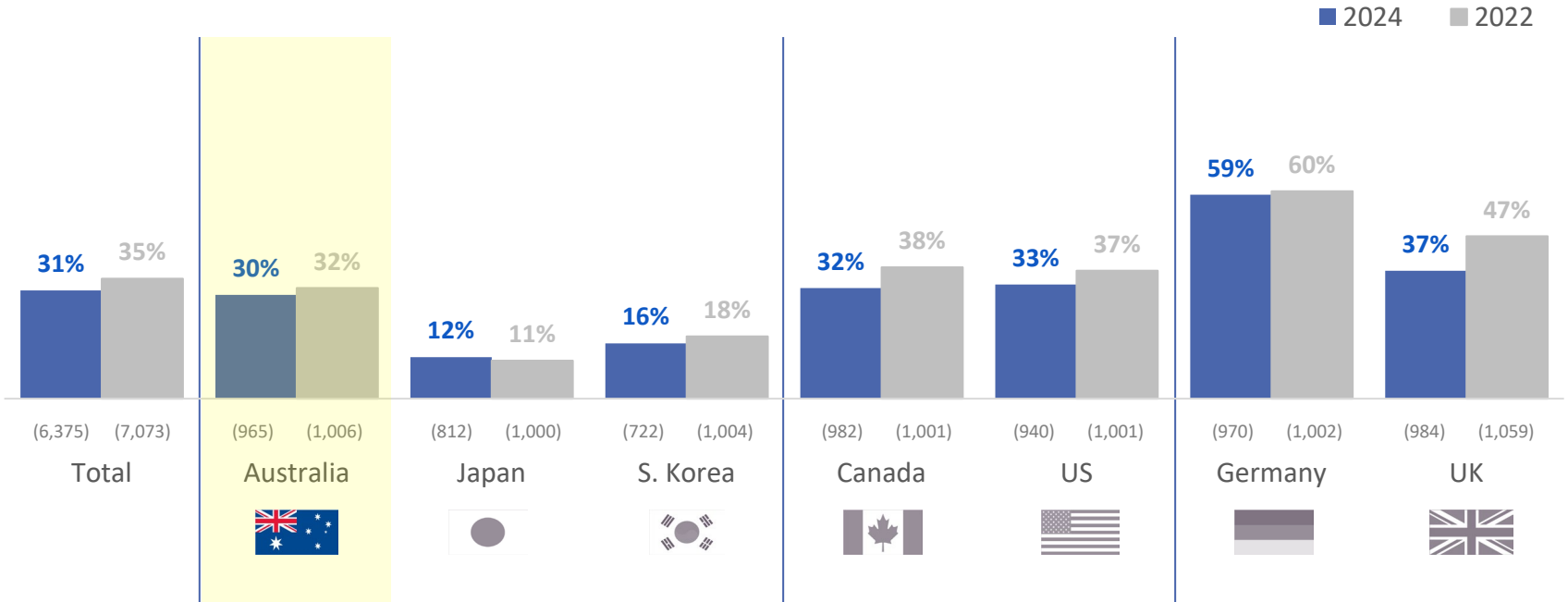
Perception of Survey Enjoyability





Survey enjoyment remains relatively stable across most countries vs. 2022.

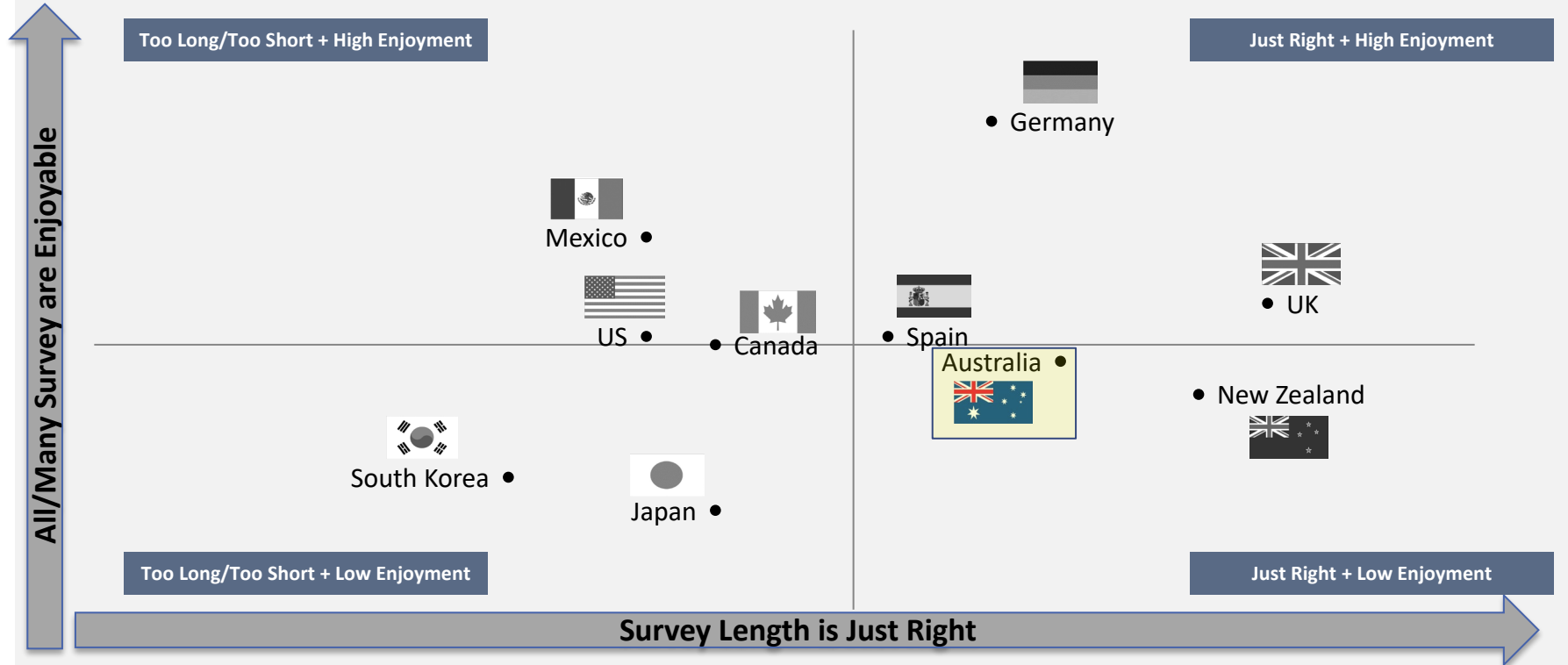
Perception of Survey Enjoyability (All/Many Were Enjoyable) - Trended to 2022





The stronger the perception of survey length being “just right,” the more likely respondents enjoyed the survey experience.

Relationship Between Survey Length & Enjoyability



PERSONAL DATA USE





While many have some awareness of how their personal data is collected and used in Australia, a sizeable portion are still unfamiliar, indicating a need for education.



Australia



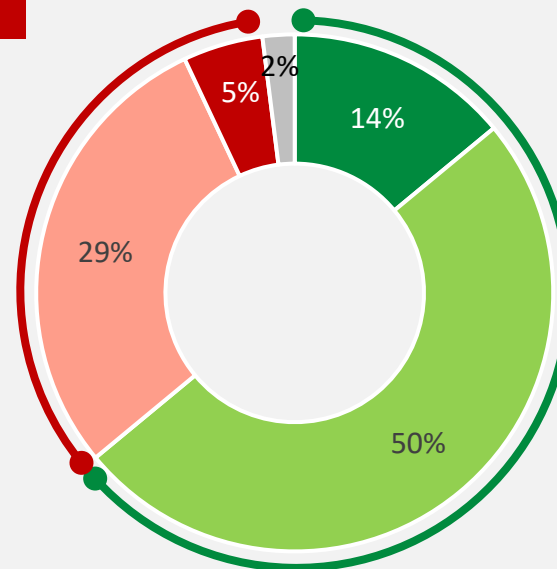
Familiarity with Personal Data Collection & Use

Not Very/At All Familiar

2024: 35%

Very/Somewhat Familiar

2024: 64%



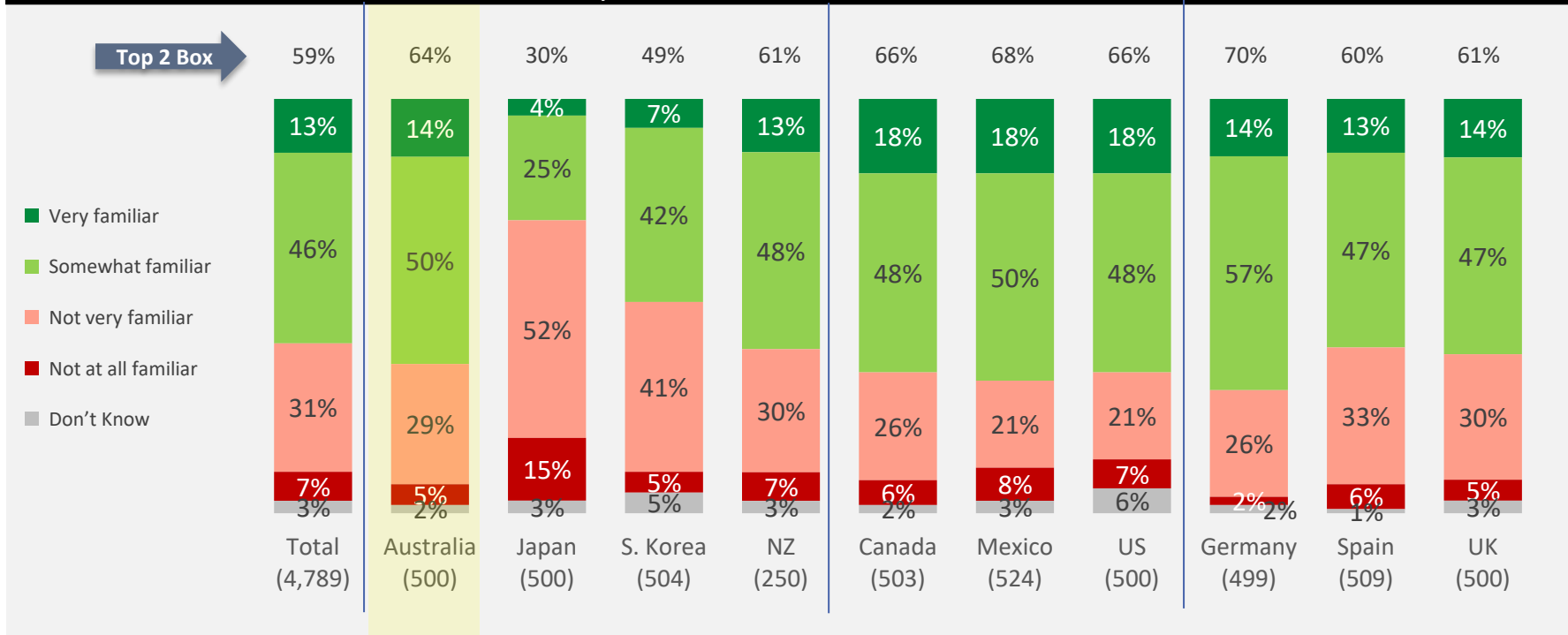
Very familiar Somewhat familiar Not very familiar Not at all familiar Don't Know



Personal data collection and usage practices in Australia are slightly higher than the global average.



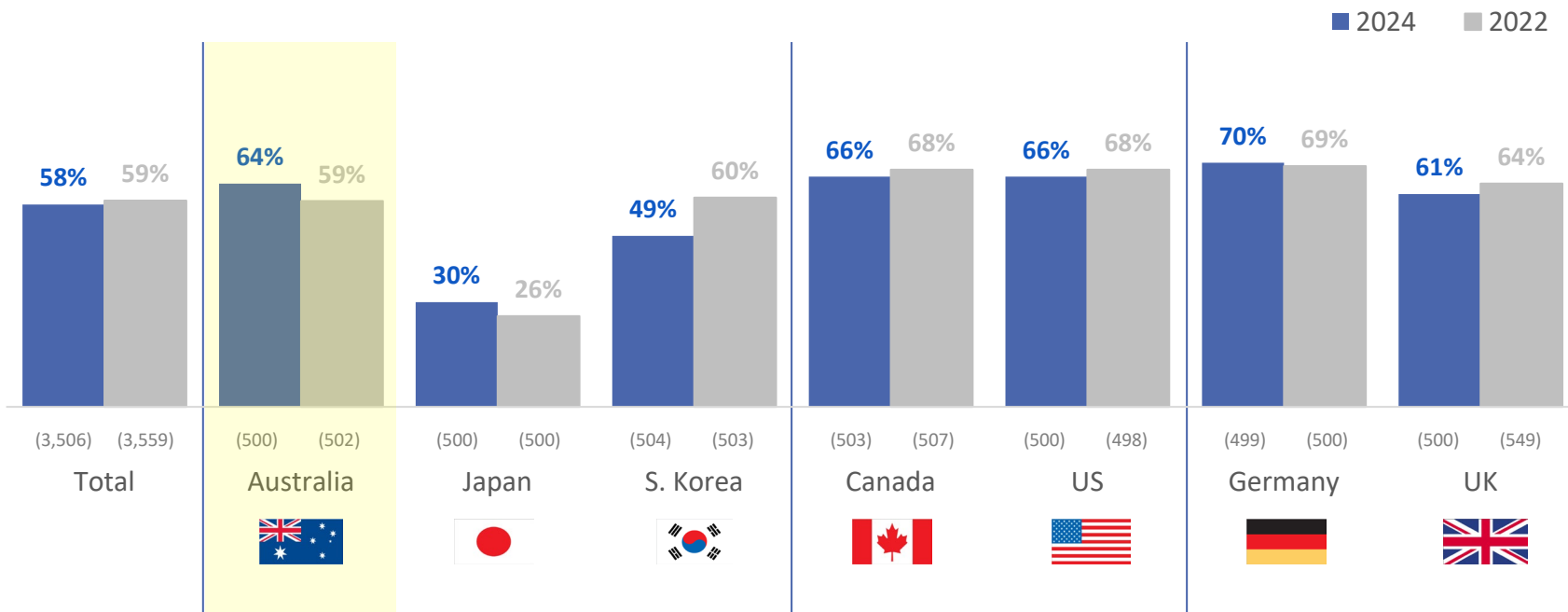
Familiarity with Personal Data Collection & Use





Familiarity is largely stable in Australia and most other countries vs. 2022.

Familiarity with Personal Data Collection & Use (Top 2 Box %) - Trended to 2022





Misuse of personal data continues to be a major concern in Australia.



Australia



Level of Concern Regarding Misuse of Personal Data

Not Very/At All Concerned

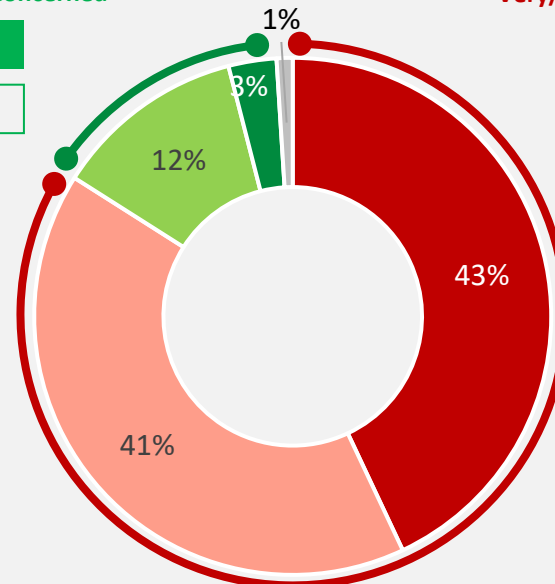
2024: 15%

2022: 13%

Very/Somewhat Concerned

2024: 84%

2022: 85%



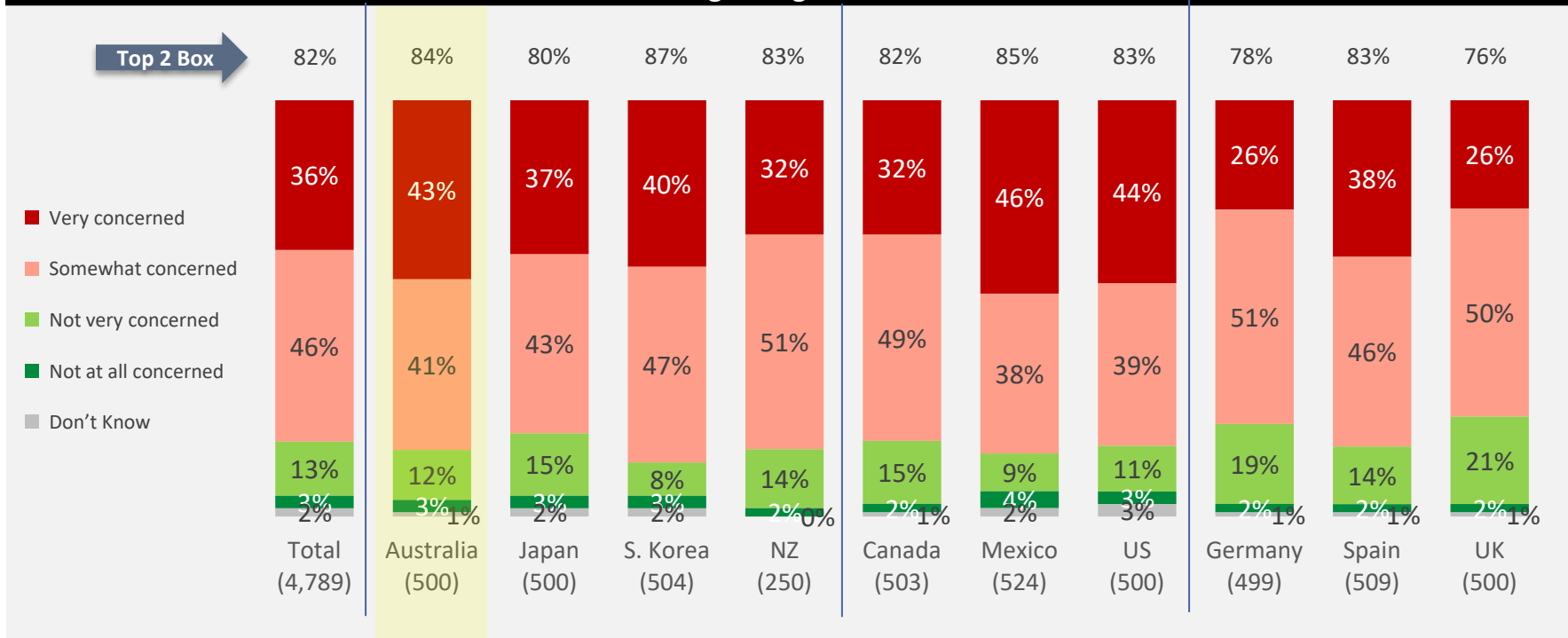
- Very concerned
- Somewhat concerned
- Not very concerned
- Not at all concerned
- Don't know/Prefer not to say



Concerns about the misuse of personal data are consistent globally. Australia performs similarly to the global average in this regard.



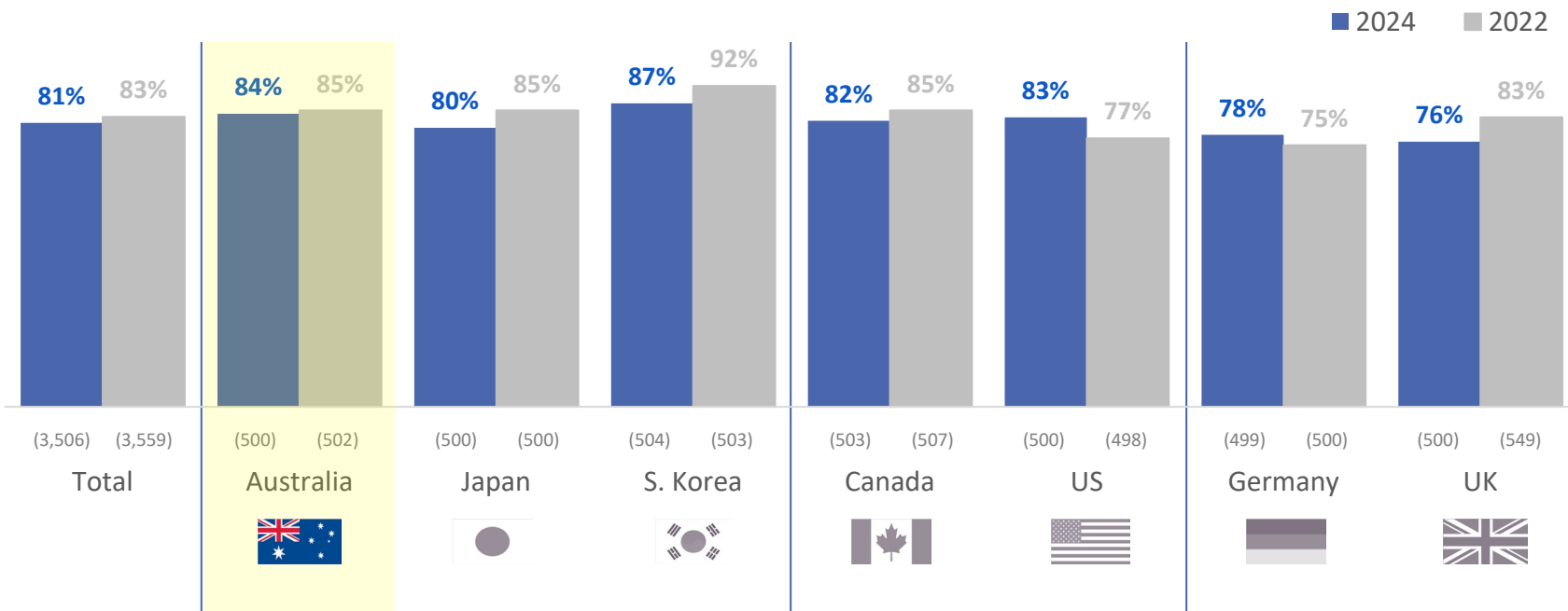
Level of Concern Regarding Misuse of Personal Data





While high, concerns about misuse of data in Australia are largely consistent vs. 2022.

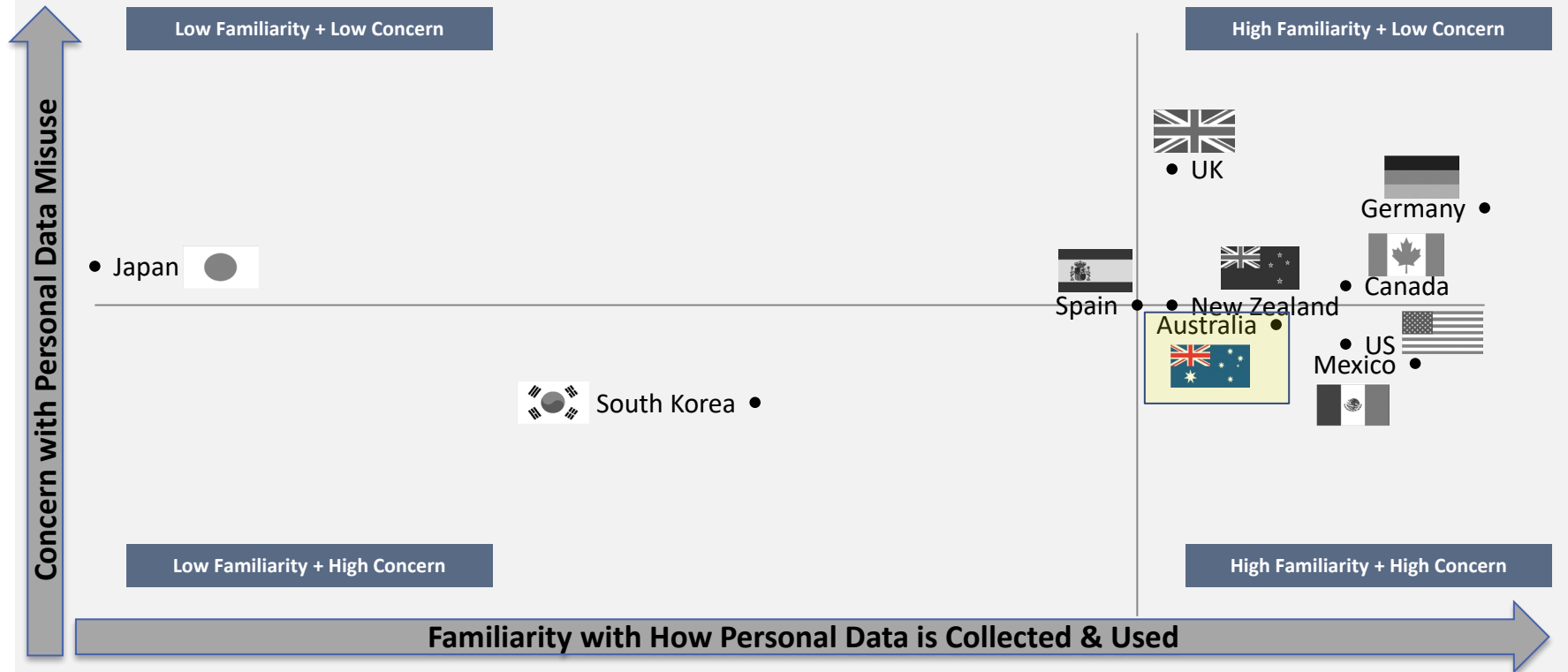
Level of Concern Regarding Misuse of Personal Data (Top 2 Box % - Very/Somewhat Concerned) - Trended to 2022





Knowing how personal data is collected doesn't assuage concerns for all.

Relationship Between Familiarity & Concern of Misuse of Personal Data Use



**PROTECTION & USE
OF PERSONAL DATA**

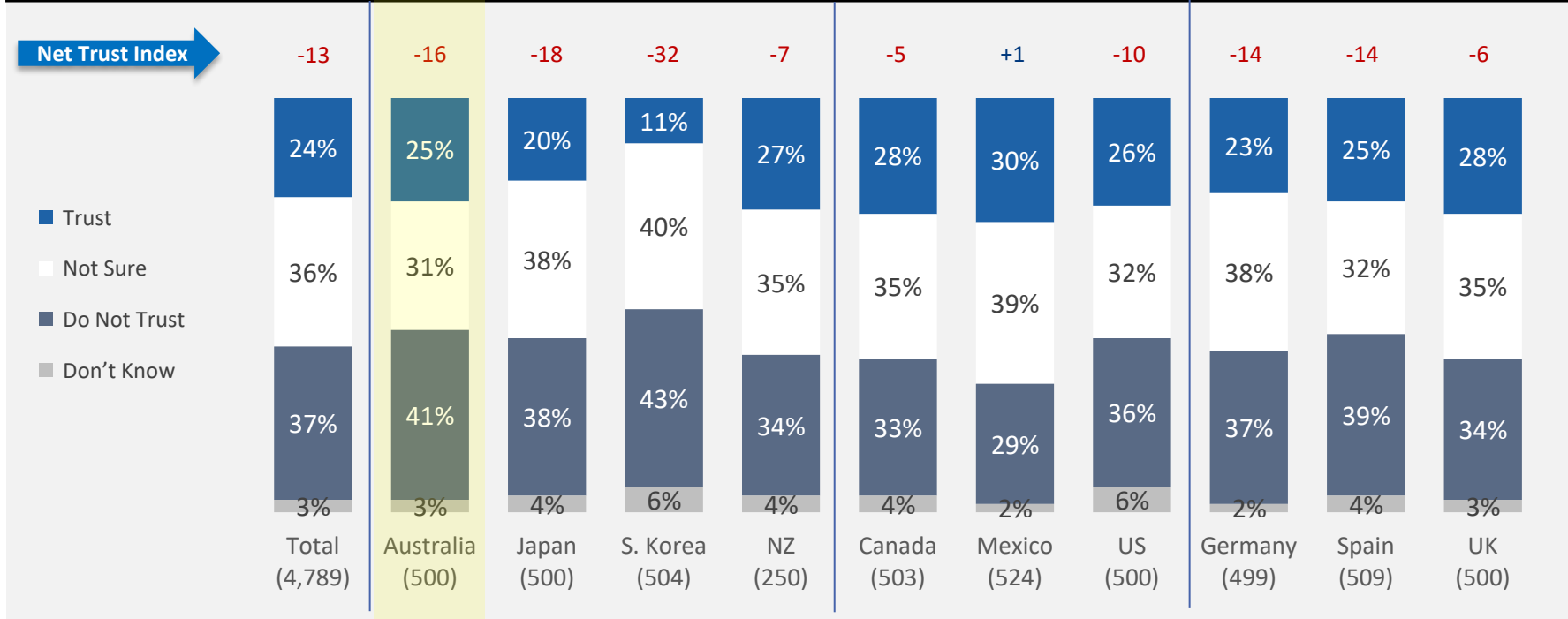




Concern exists in all countries regarding trust in organizations' abilities to protect and use consumer data responsibly. In this regard, Australia is similar to the global average.



Average Level of Trust that Organizations/Professionals Protect & Appropriately Use Personal Data†










Net Trust Index = % Trust – % Do Not Trust

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



There's a global decline in trusting that organizations will safeguard and use personal data appropriately vs. 2022.

Average Level of Trust that Organizations/Professionals Protect & Appropriately Use Personal Data† - Trended to 2022

	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK
Net Trust Index →	2024	-14	-18	-32	-5	-10	-14	-6
	vs. 2022	-6	-6	-7	-5	-6	-12	-8
% Trust →	2024	23%	20%	11%	28%	26%	23%	28%
	vs. 2022	-3%	+1%	-1%	-4%	-4%	-6%	-4%
% Do Not Trust →	2024	37%	38%	43%	33%	36%	37%	34%
	vs. 2022	+4%	+7%	+5%	+1%	+2%	+6%	+4%

Net Trust Index = % Trust – % Do Not Trust

*Total based on comparable countries across waves.

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

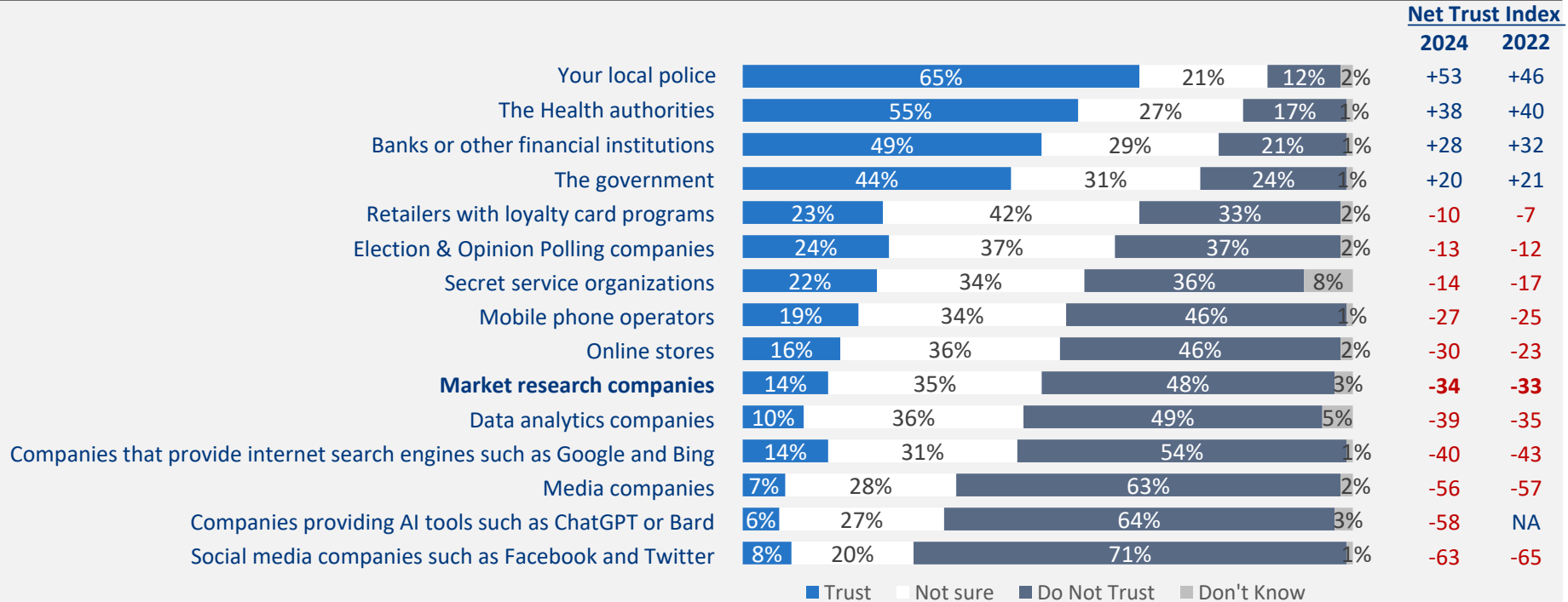


Companies most trusted to guard against the misuse of personal data in Australia are still law enforcement, health authorities, banks and the government. Conversely, media companies, AI providers and social media platforms face the most distrust. Market research firms also rank towards the bottom in this aspect.



Australia

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



Net Trust Index = % Trust – % Do Not Trust

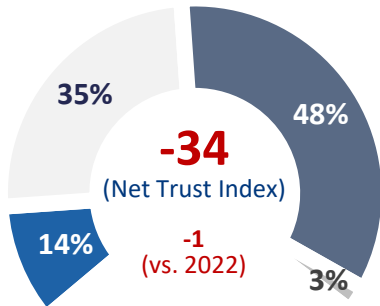


In regard to personal data, and within the “insights space,” Australians are once again least distrustful of election and opinion polling companies.

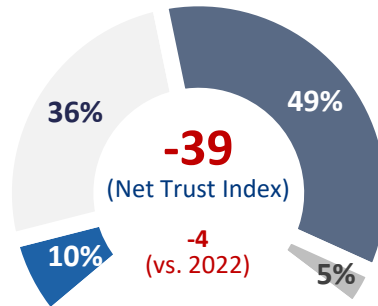


Australia

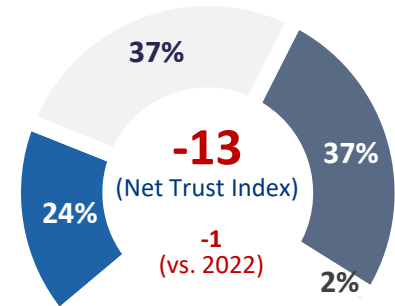
Trust in Market Research



Trust in Data Analytics



Trust in Election & Opinion Polling



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

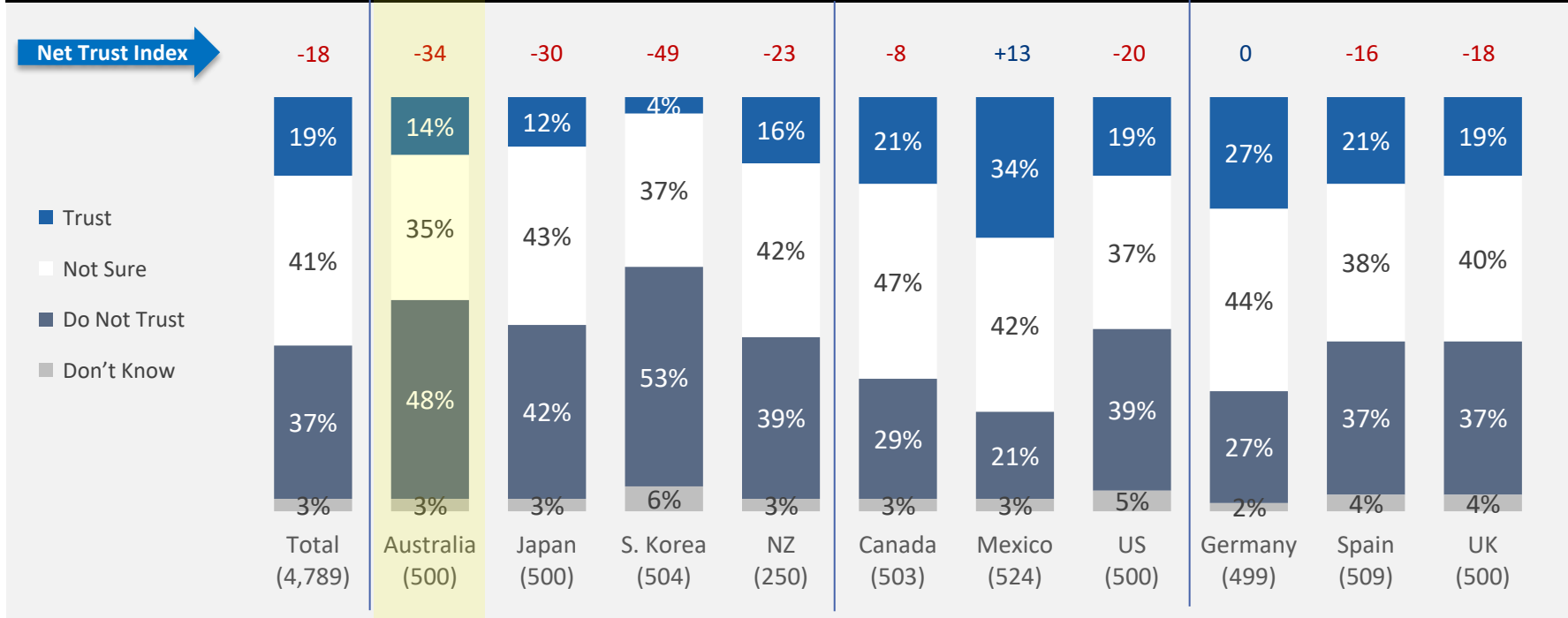
Net Trust Index = % Trust – % Do Not Trust



Except for Mexico, there's little trust in the ability of market research companies to protect and use personal data responsibly, especially in South Korea, Australia and Japan.



Trust in Market Research to Protect & Appropriately Use Personal Data










Net Trust Index = % Trust – % Do Not Trust



Trust of market research companies in this regard remains negative in Australia, although it's unchanged vs. 2022.

Trust in Market Research to Protect and Appropriately Use Personal Data - Trended to 2022

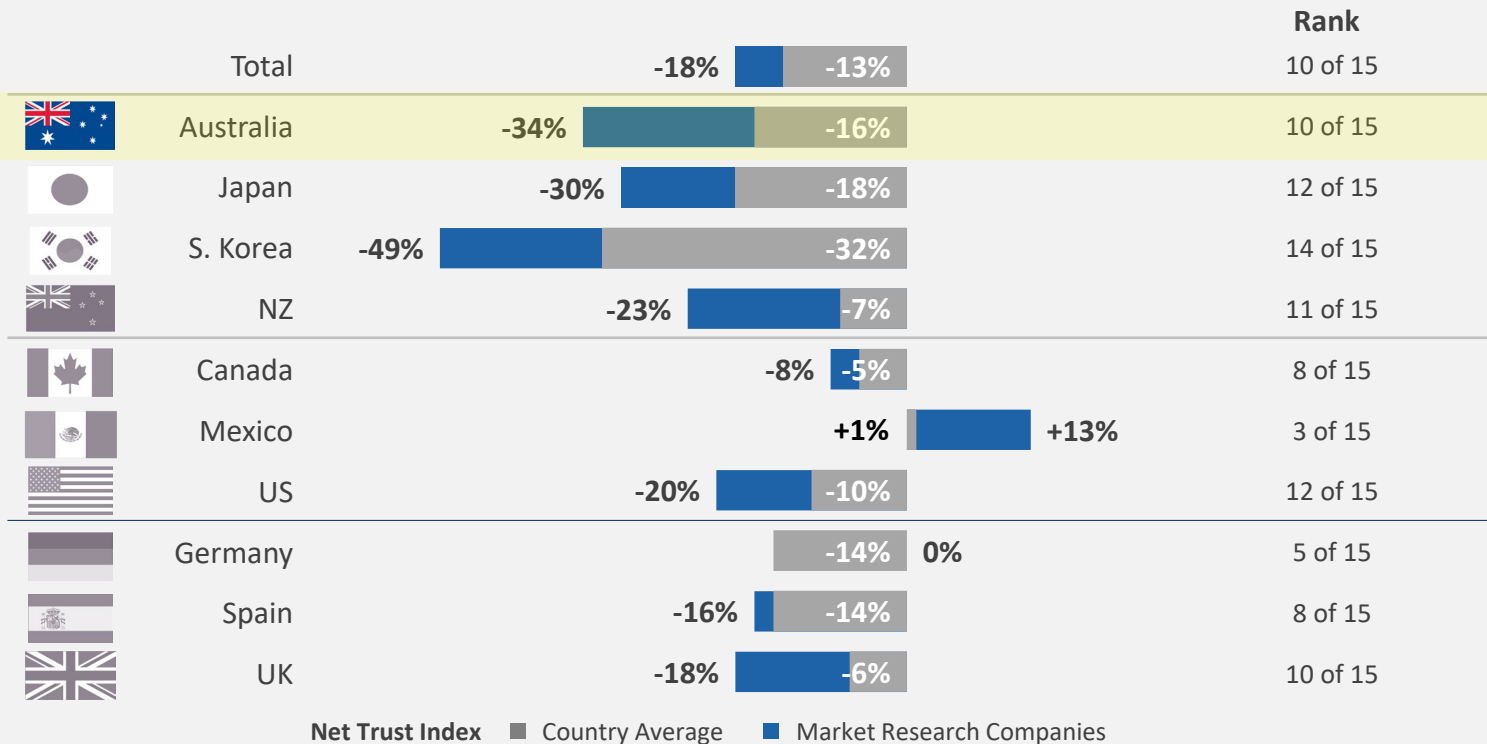
	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index →	2024	-23	-34	-30	-49	-8	-20	--	-18
	vs. 2022	-5	--	-5	-12	+8	-12	-8	-7
% Trust →	2024	17%	14%	12%	4%	21%	19%	27%	19%
	vs. 2022	-2%	--	+3%	-3%	+3%	-7%	-3%	-5%
% Do Not Trust →	2024	39%	48%	42%	53%	29%	39%	27%	37%
	vs. 2022	+4%	+1%	+8%	+9%	-5%	+5%	+6%	+2%

Net Trust Index = % Trust – % Do Not Trust
 *Total based on comparable countries across waves.



Relative to other industries, market research companies perform in the bottom third in Australia and most other countries.

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



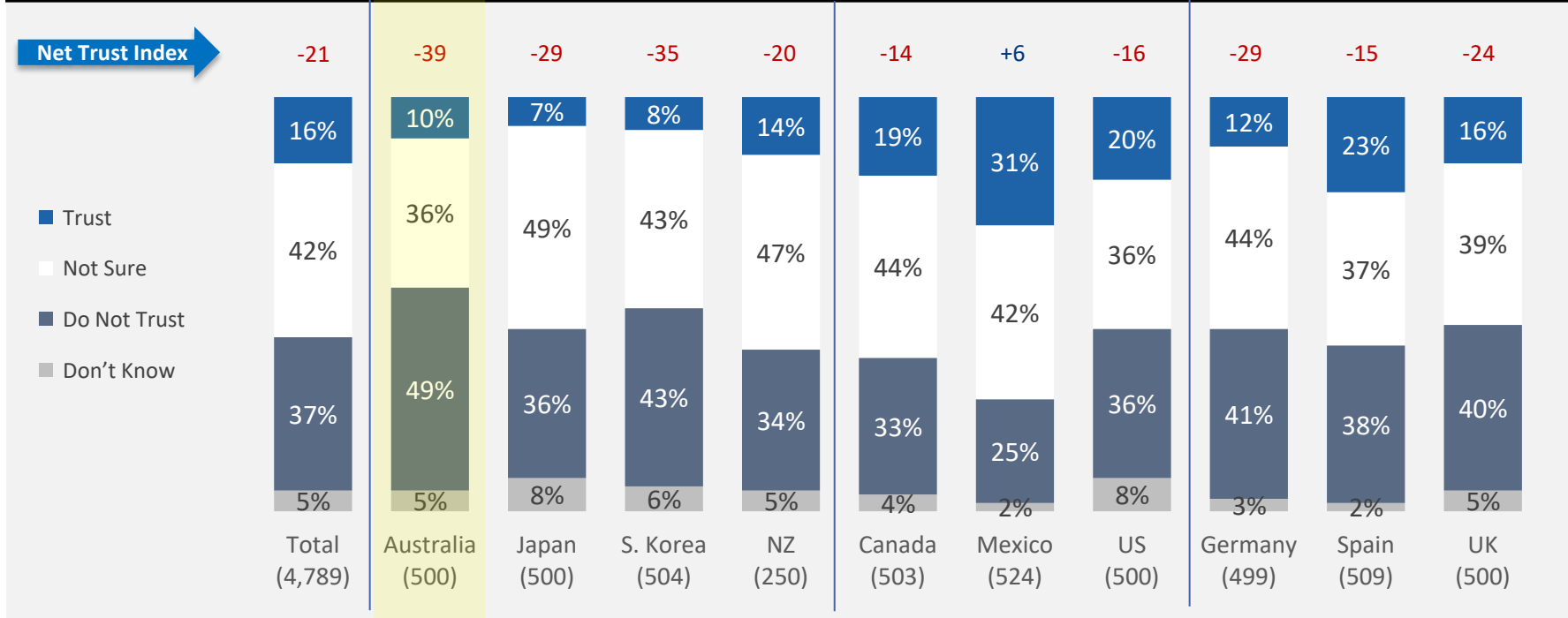
Net Trust Index = % Trust – % Do Not Trust



There's deep distrust in data analytics companies' perceived handling of personal data, with Australia falling well below the global average.



Trust in Data Analytics to Protect & Appropriately Use Personal Data










Net Trust Index = % Trust – % Do Not Trust



Net trust remains negative overall, with distrust growing in Australia and most other countries.

Trust in **Data Analytics** to Protect and Appropriately Use Personal Data - Trended to 2022

	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK
Net Trust Index →	2024	-27	-39	-29	-14	-16	-29	-24
	vs. 2022	-5	-4	-6	+2	-3	-10	-9
% Trust →	2024	13%	10%	7%	19%	20%	12%	16%
	vs. 2022	-2%	-2%	--	+2%	-1%	-5%	-6%
% Do Not Trust →	2024	40%	49%	36%	33%	36%	41%	40%
	vs. 2022	+3%	+2%	+6%	+3%	--	+2%	+3%

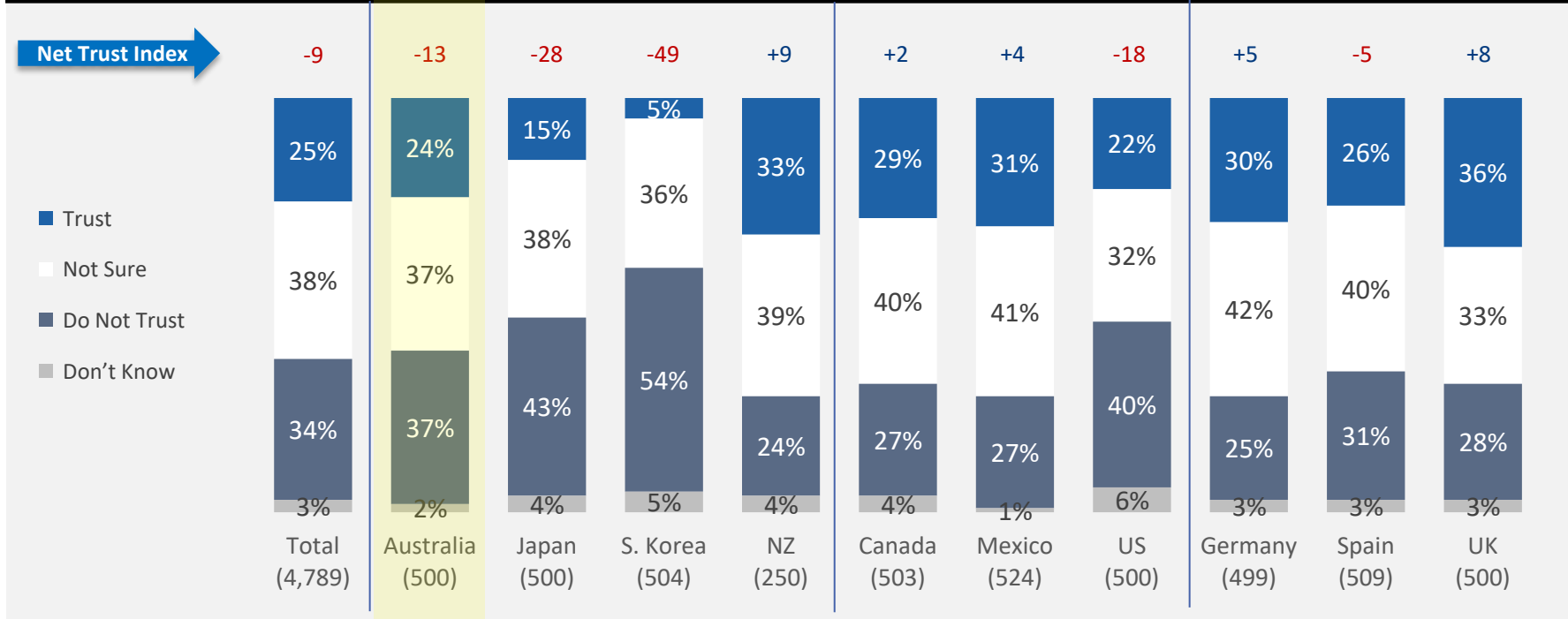
Net Trust Index = % Trust – % Do Not Trust
*Total based on comparable countries across waves.



Trust in polling companies' data handling varies widely – Australia is fairly comparable to the global average.



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










Net Trust Index = % Trust – % Do Not Trust




Trust in election & opinion polling companies' data privacy practices dropped globally.

Trust in Election & Opinion Polling to Protect and Appropriately Use Personal Data - Trended to 2022

	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK
Net Trust Index →	2024	-13	-28	-49	+2	-18	+5	+8
	vs. 2022	-4	-5	-9	--	+1	-14	-1
% Trust →	2024	23%	15%	5%	29%	22%	30%	36%
	vs. 2022	-1%	+4%	-2%	-2%	-1%	-8%	+3%
% Do Not Trust →	2024	36%	43%	54%	27%	40%	25%	28%
	vs. 2022	+3%	+9%	+7%	-2%	-2%	+5%	+4%

Net Trust Index = % Trust – % Do Not Trust
*Total based on comparable countries across waves.

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

A magnifying glass with a black handle and frame is positioned over a list of personal data fields. The background features a stylized fingerprint pattern of grey lines on a white background. The magnifying glass's lens is centered on the text, which is rendered in a bold, sans-serif font. The text is arranged in a vertical list, with some words in larger, bolder fonts than others. The list includes: FULL NAME, AGE, GENDER, TELEPHONE NUMBER, TAX INFO, ADDRESS, CITIZENSHIP, BIRTH DATE, EDUCATION, TRAVEL DOCUMENT, NATIONAL IDENTITY NUMBER, CRIMINAL RECORD, NATIONALITY, MARITAL STATUS, INCOME INFO, IDENTITY DOCUMENT, BANK ACCOUNT NUMBER, OCCUPATION, VISA INFO, and MEDICAL RECORD.

FULL NAME
AGE GENDER
TELEPHONE NUMBER
TAX INFO **ADDRESS**
CITIZENSHIP
BIRTH DATE EDUCATION
TRAVEL DOCUMENT
NATIONAL IDENTITY NUMBER
CRIMINAL RECORD
NATIONALITY
MARITAL STATUS
INCOME INFO
IDENTITY DOCUMENT
BANK ACCOUNT NUMBER
OCCUPATION **VISA INFO**
MEDICAL RECORD



Public opinion on the use of personal data by market research companies is still divided in Australia, with similar proportions finding it both appropriate and inappropriate.



Australia



Appropriate Use of Personal Data by Market Research

Bottom 2 Box: Inappropriate

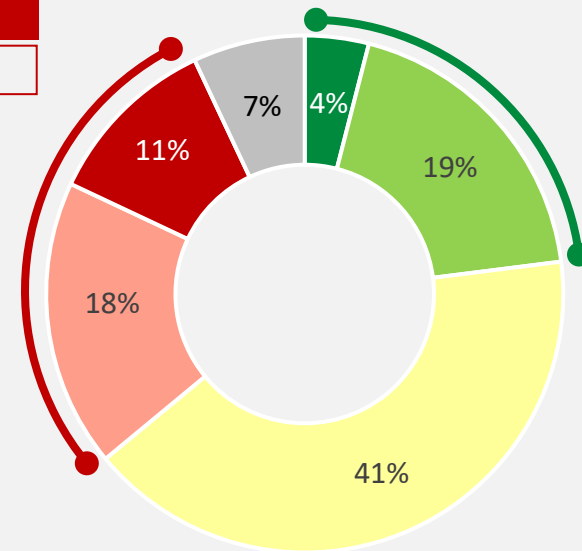
2024: 29%

2022: 29%

Top 2 Box: Appropriate

2024: 23%

2022: 22%



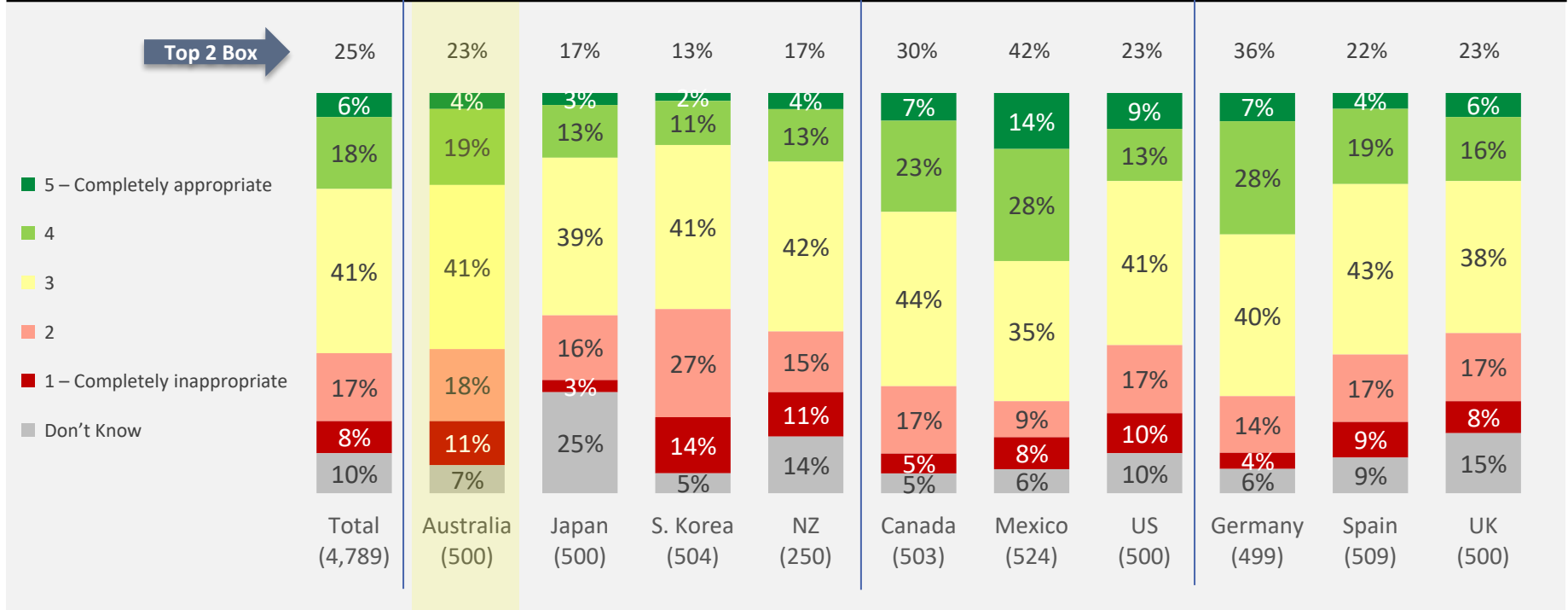
■ 5 - Completely appropriate ■ 4 ■ 3 ■ 2 ■ 1 - Completely inappropriate ■ Don't know



This mixed sentiment is evident across countries – Australia performs similarly to the global average in this regard.



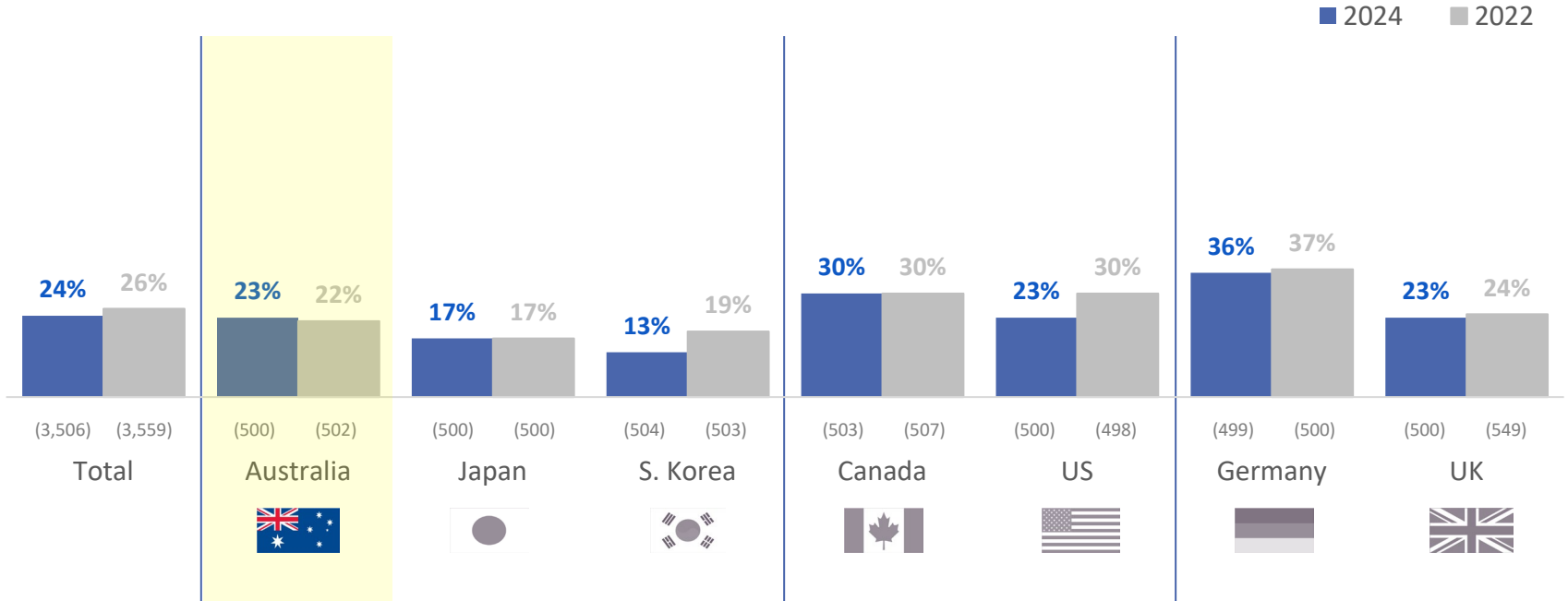
Appropriate Use of Personal Data by Market Research





In Australia, feelings about market research companies' appropriate use of personal data are consistent with 2022.

Appropriate Use of Personal Data by Market Research (Top 2 Box %) - Trended to 2022





Market research companies continue to face high levels of concern over data protection in Australia.



Australia

Concern that Market Research Securely Protects Personal Data

Bottom 2 Box: Not Concerned

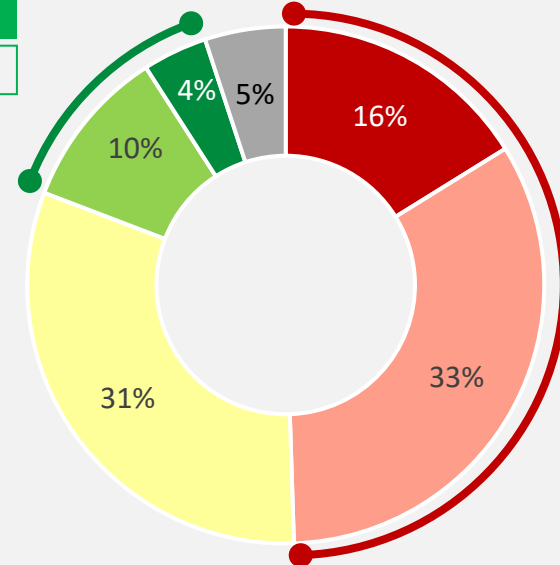
2024: 14%

2022: 12%

Top 2 Box: Concerned

2024: 49%

2022: 50%



■ 5 - Completely concerned ■ 4 ■ 3 ■ 2 ■ 1 - Not at all concerned ■ Don't know

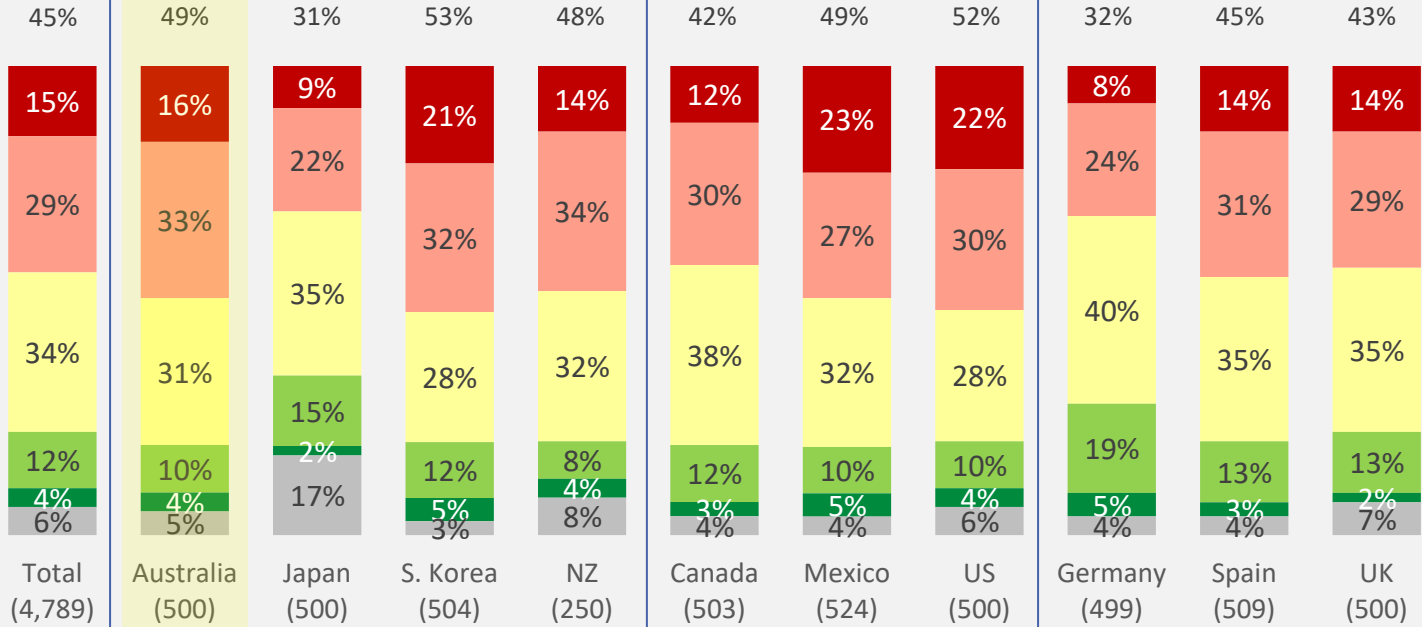


In Australia, concern in this regard is generally on par with the global average.



Concern that Market Research Securely Protects Personal Data

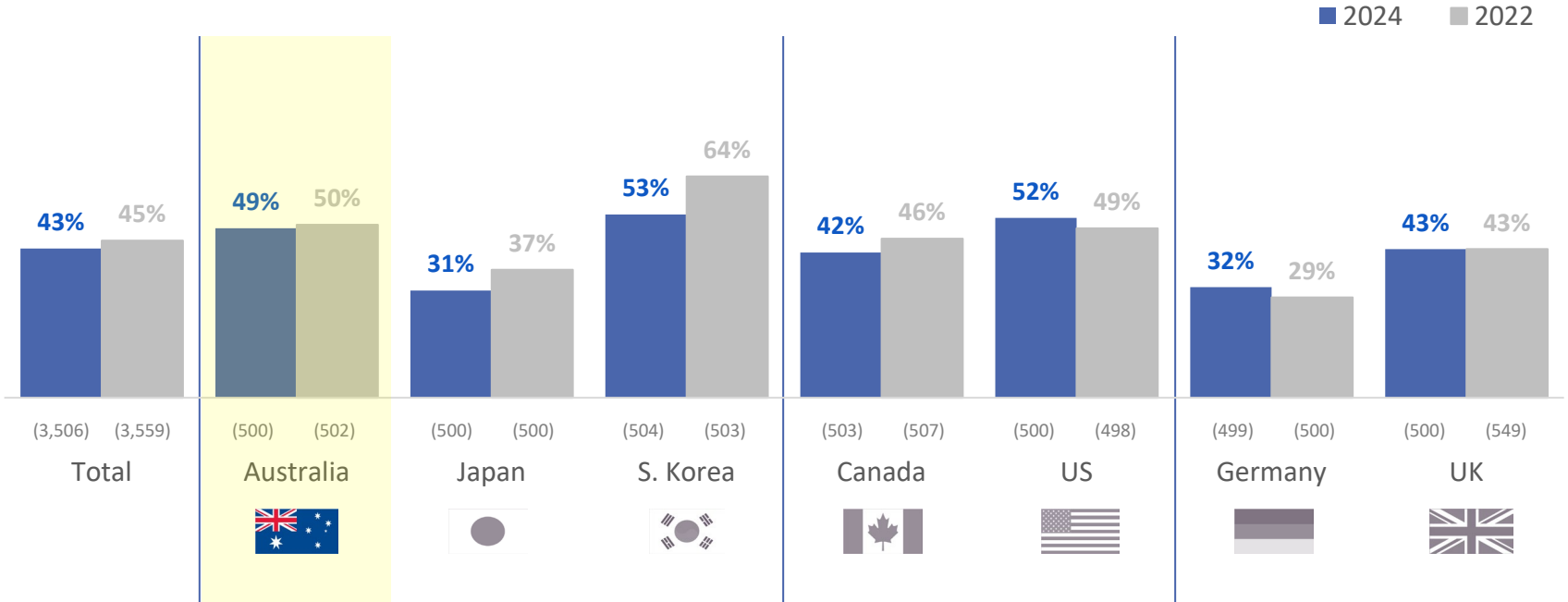
Top 2 Box →





Relative to 2022, concern in Australia is stable.

Concern that Market Research Securely Protects Personal Data (Top 2 Box %) - Trended to 2022





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



Australia



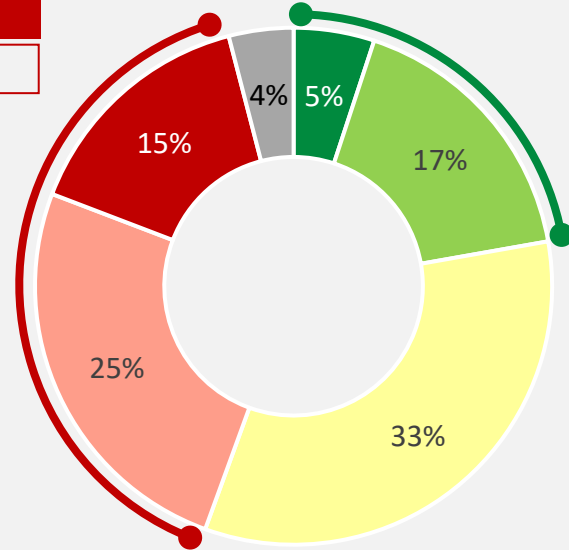
Degree Informed about Personal Data Collection, Storage & Use

Bottom 2 Box: Not Informed

2024: 40%
2022: 43%

Top 2 Box: Informed

2024: 22%
2022: 20%



■ 5 - Completely informed ■ 4 ■ 3 ■ 2 ■ 1 - Not at all informed ■ Don't know

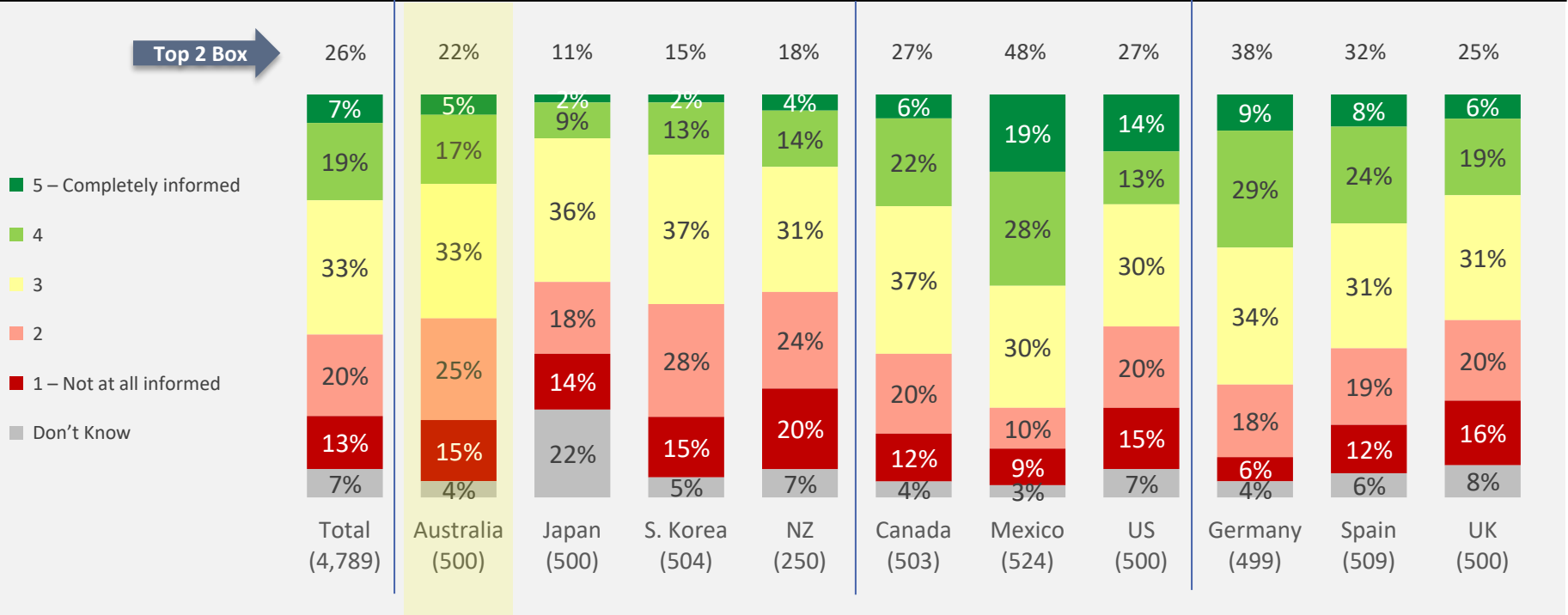


In Australia, this viewpoint generally aligns with the global average.



Degree Informed about Personal Data Collection, Storage & Use

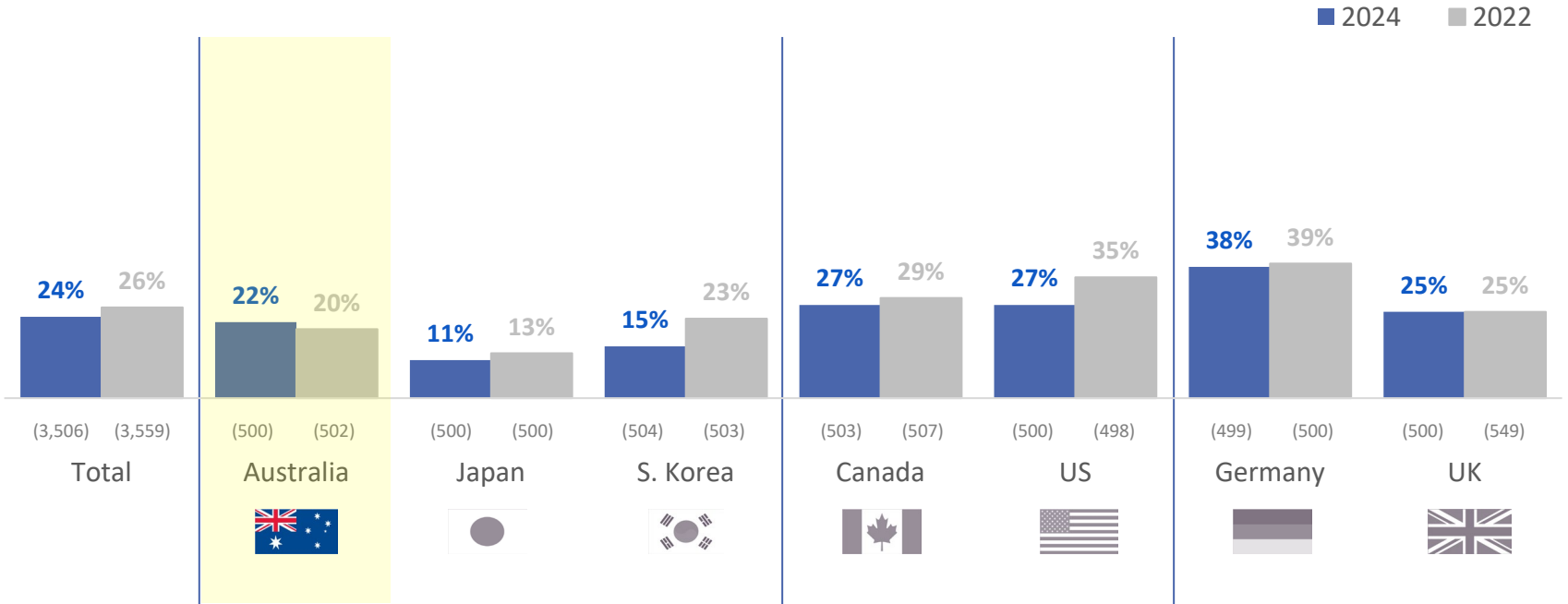
Top 2 Box →



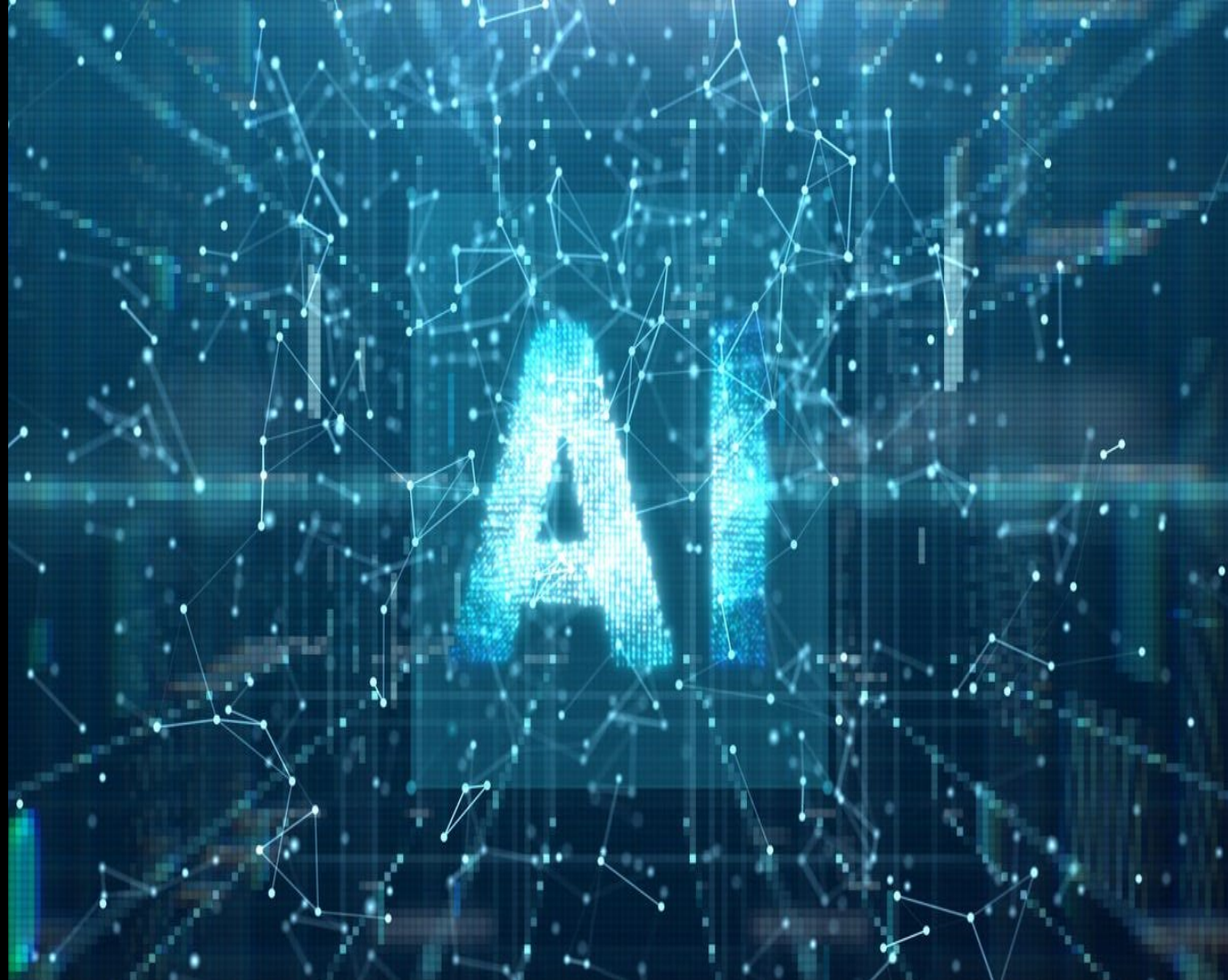


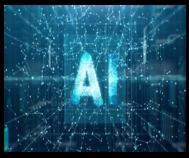
Sentiment is largely similar relative to 2022.

Degree Informed about Personal Data Collection, Storage & Use (Top 2 Box %) - Trended to 2022



**HOW AI
IMPACTS
THE LEVEL OF TRUST**





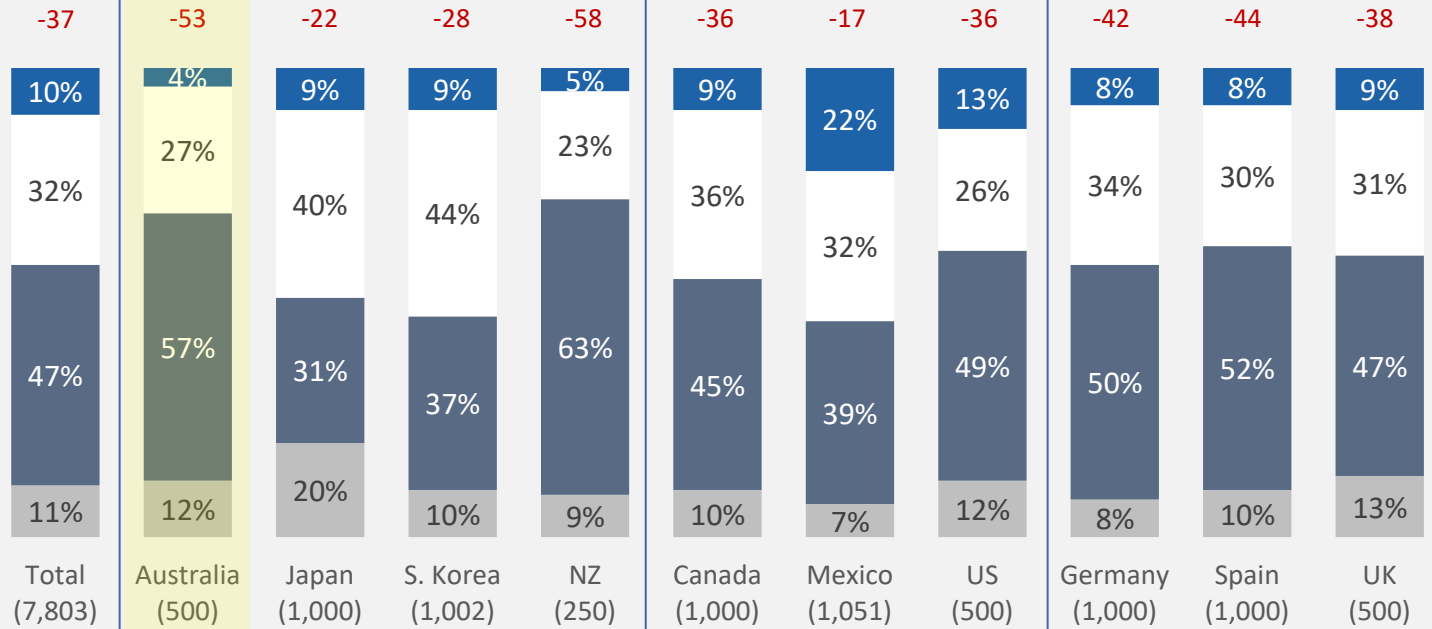
Incorporating AI into market research practices negatively impacts trust in market research companies, especially in New Zealand and Australia.



Average Impact on Trust of Market Research Companies Using AI†

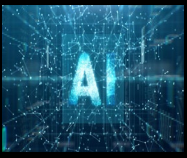
Net Trust Index

- Increase Trust
- No Impact
- Decrease Trust
- Don't Know



Net Trust Index = % Increase Trust – % Decrease Trust

†Scores are an average across the 5 uses of AI by market research companies

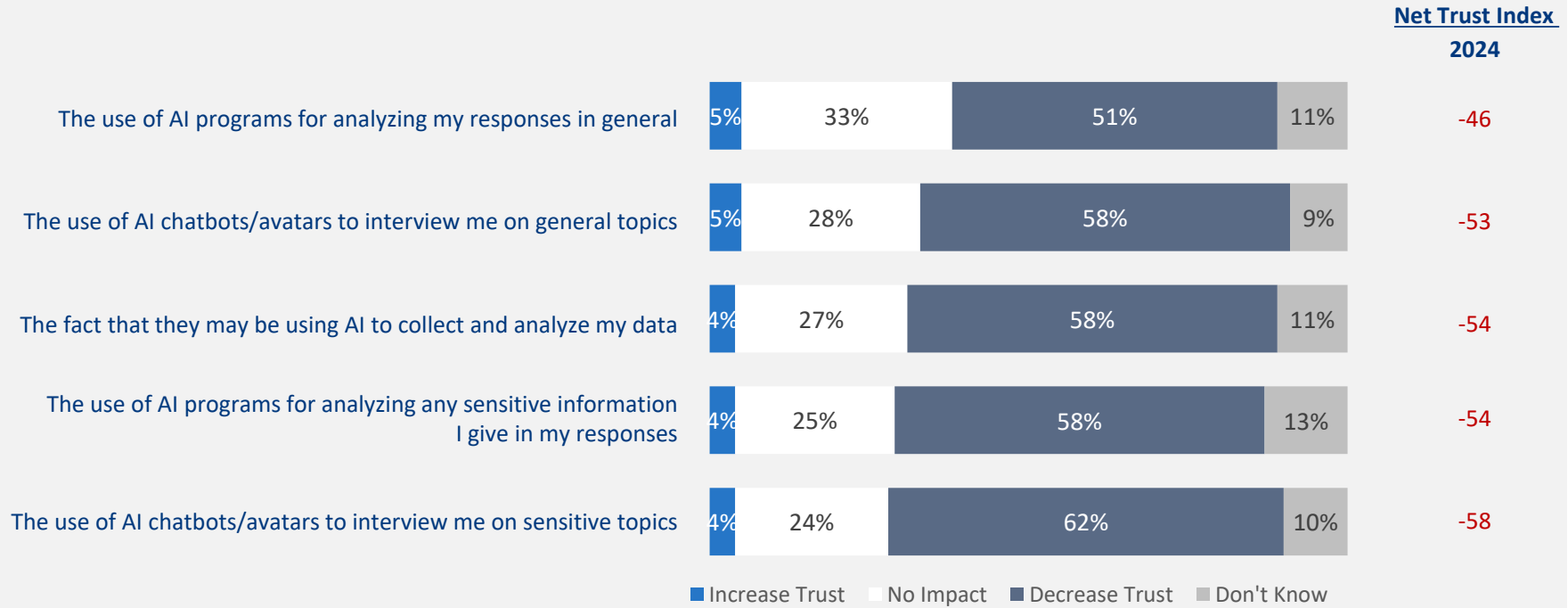


Net trust is negative across all aspects of AI use by market research companies.

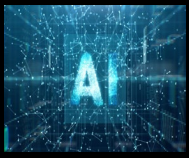


Australia

Levels of Trust in Ways AI is used by Market Research Companies



Net Trust Index = % Increase Trust – % Decrease Trust



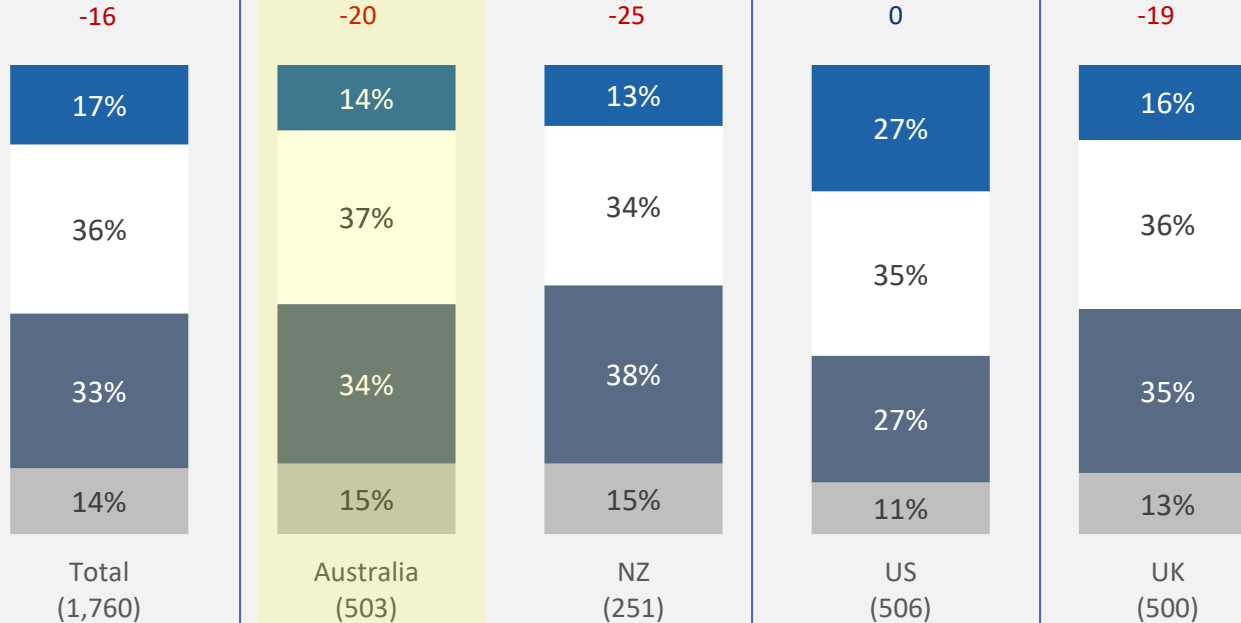
On a net basis, Australians are negative about how the use of AI by market research companies impacts trustworthiness.



Average Impact on Trust of Companies Claiming Benefits of Using AI†

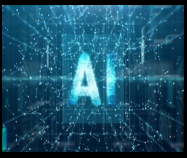
Net Trust Index

- Increase Trust
- No Impact
- Decrease Trust
- Don't Know



Net Trust Index = % Increase Trust – % Decrease Trust

†Scores are an average across the 5 benefits by companies using AI

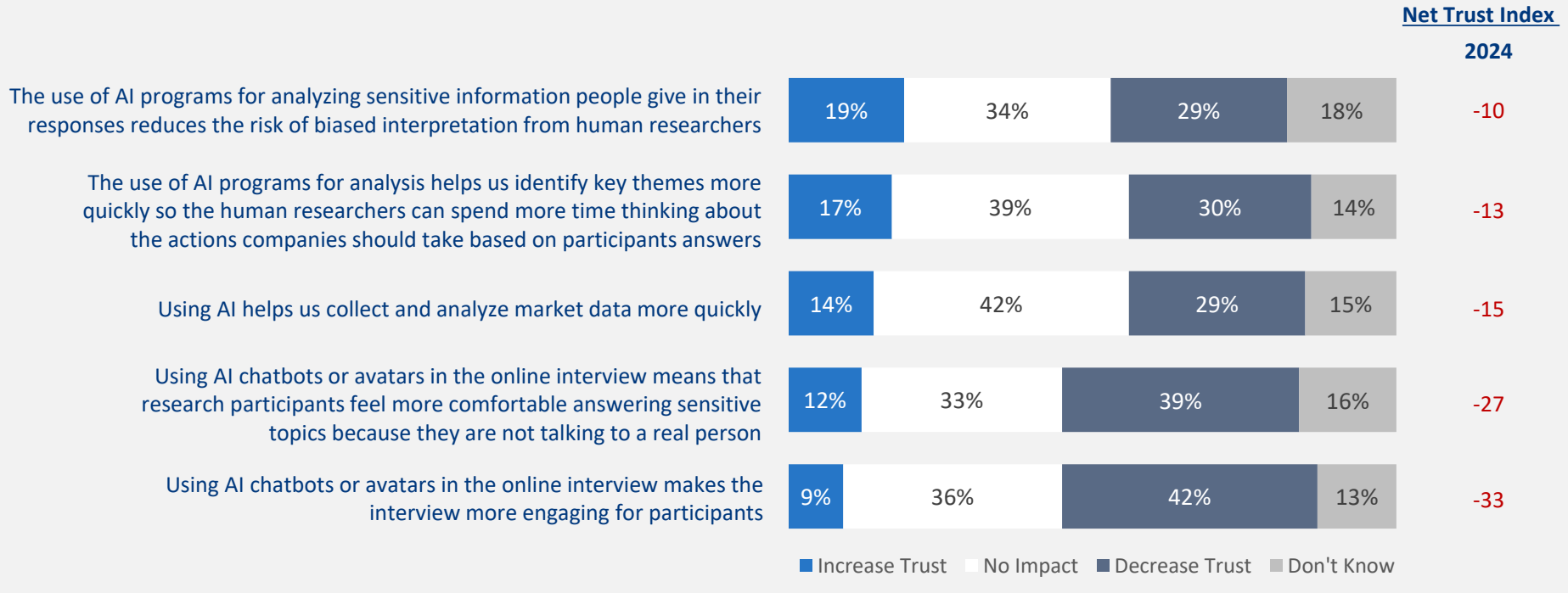


This perceived distrust extends to all claimed benefits, particularly the use of AI chatbots or avatars during interviewing.



Australia

Levels of Trust in Benefits of Using AI Claimed by Companies



Net Trust Index = % Increase Trust – % Decrease Trust

**TREND DATA
2024 VS. 2022**



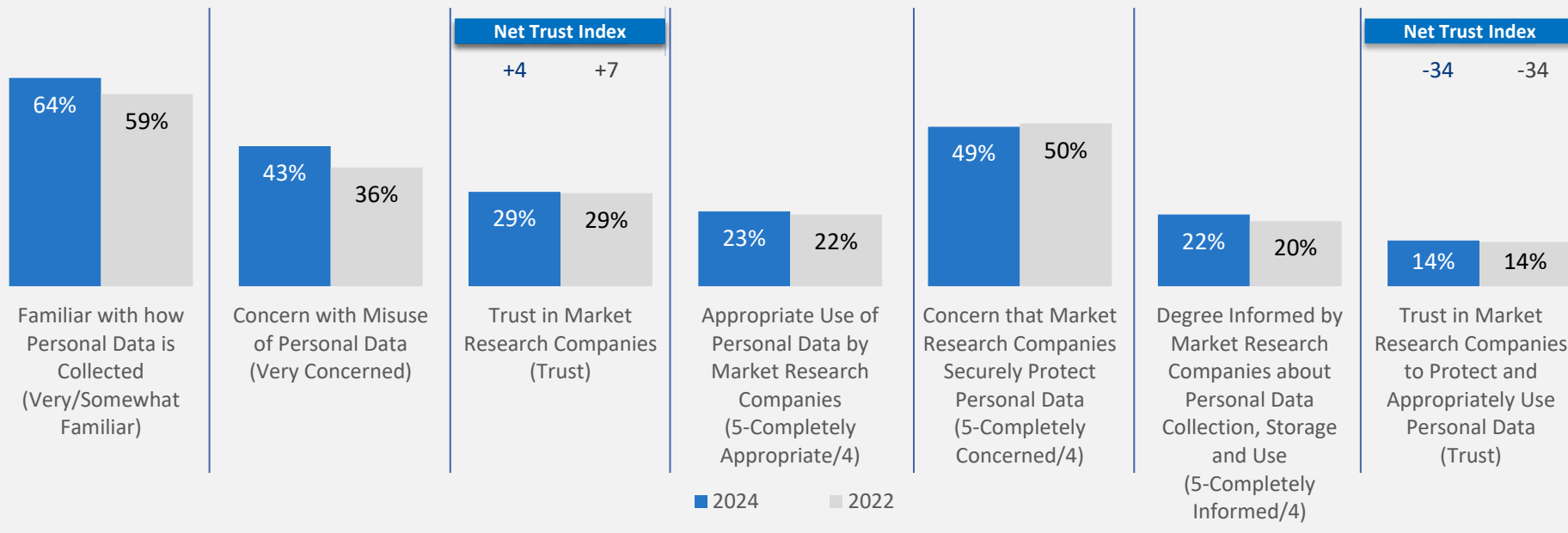


Net trust in market research companies overall and in regard to personal data is largely consistent with 2022.



Australia

2024 vs. 2022 Comparison



PLEASE VISIT THE [GRBN](#)
[WEBSITE](#) TO FIND OUT MORE
ABOUT BUILDING PUBLIC
TRUST AND OTHER GLOBAL
INDUSTRY INITIATIVES

ANDREW CANNON
EXECUTIVE DIRECTOR, GRBN
ANDREW.CANNON@GRBN.ORG

