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# Global Trust Survey 2024

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

**Focus on Canada**

April 2024





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# 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.

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

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## Thought Leadership – By John Tabone, Canadian Research Insights Council

### **Growing Trust More Critical than Ever in Face of AI/Data Protection Concerns.**

As an industry, we have long recognized that gaining the trust of participants is critical to the work that we do. We rely on the honest opinions of participants to deliver the insights that can help organizations enhance the programs, products and services they offer.

That is why growing trust with participants is fundamental to our standards. Our standards require researchers to be transparent with participants on how we will use the information we collect, to always protect the personal information from unauthorized access and to always behave ethically and avoid anything that could harm a research participant or our industry's reputation.

The findings of the GRBN Global Trust Survey 2024 demonstrate that the Canadian industry continues to have a net positive trust score of 21, well above the global average. It is also trending up 3 points since the 2022. The survey also found that the majority of Canadian continue to perceive market research as beneficial.

While the findings are generally positive, the remains significant opportunity to do better. The 2024 survey also highlight concerns regarding the use of AI and concerns about data protection as major risks to trust moving forward. The survey found that, for a majority of Canadians, incorporating AI into market research practices negatively impacts trust. The survey also found that trust in Market Research Companies to Protect and Appropriately Use Personal Data was low with a net trust index of -8 (though an 8 point improvement over 2022). Given these concerns, it is more critical than ever that we continue to enhance our efforts to increase trust.

In Canada, the CRIC AI Committee is already working to develop guidelines to ensure the responsible and ethical use of AI tools by CRIC member companies.

CRIC also offers privacy and information security toolkits to help ensures its members have the policies and procedures to protect the personal information of Canadian. And the CRIC accreditation program includes a strong emphasis on privacy and information security in addition to research practice.



## Thought Leadership – By John Tabone, Canadian Research Insights Council

While having strong standards and compliance with those standards is essential, it is also critical that Canadian understand the protection those standards offers and can differentiate CRIC member companies that follow those standards from other companies that do not adhere to these standards. That is why CRIC created the [CRIC Pledge to Canadians](#) and the [CRIC Research Verification Service](#).

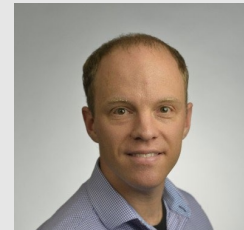
The CRIC Pledge to Canadians highlights 10 key commitments that CRIC member agencies make to Canadians in simple and clear language. These commitments not only convey some of key aspects of our standards but also serve as way for Canadians to differentiate requests from CRIC member agencies from other companies that do not adhere to the same standards.

One of the commitments is for CRIC members to register all projects with Canadians in the CRIC Research Verification Service. The CRIC Research Verification Services provides a service for Canadians to confirm the legitimacy of research they are invited to participate in and also to submit questions or concerns with respect to the research.

Our efforts to grow trust have allowed us to maintain a net positive trust score with Canadians. As our industry leverages more AI based tools, we must continue our efforts to grow trust with Canadians.

John Tabone, CAIP

CEO, Canadian Research Insights Council



CANADIAN RESEARCH  
INSIGHTS COUNCIL  
LE CONSEIL DE RECHERCHE  
ET D'INTELLIGENCE  
MARKETING CANADIEN



# Thought Leadership – By Greg Matheson, Quest Mindshare

## LOI and how it impacts Data Quality

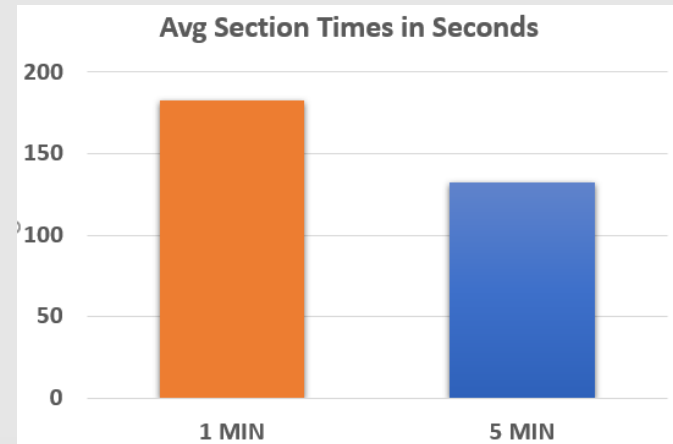
One of the metrics applied to the global trust survey centers on LOI. The findings here are not a surprise and have been consistent over time. In Canada, approximately half of respondents surveyed find surveys too long. About half of people surveyed also have a general mistrust of market research companies. While not necessarily linked, none of this should be surprising to anyone.

These are all ‘knowns’ in our space, otherwise known as the insights industry. The biggest question researchers should be asking themselves is how does that dissatisfaction with length of survey impact the quality of data collected? Ultimately impacting decisions being made from that very data. That, to me, should be paramount to anyone designing a survey.

And there is an impact, and it’s very real!

A few years ago, our researchers at Quest Mindshare set out to find a data degradation factor. Essentially understand how Length of Interview impacts data quality and what factor – call it a data degradation factor, they could apply.

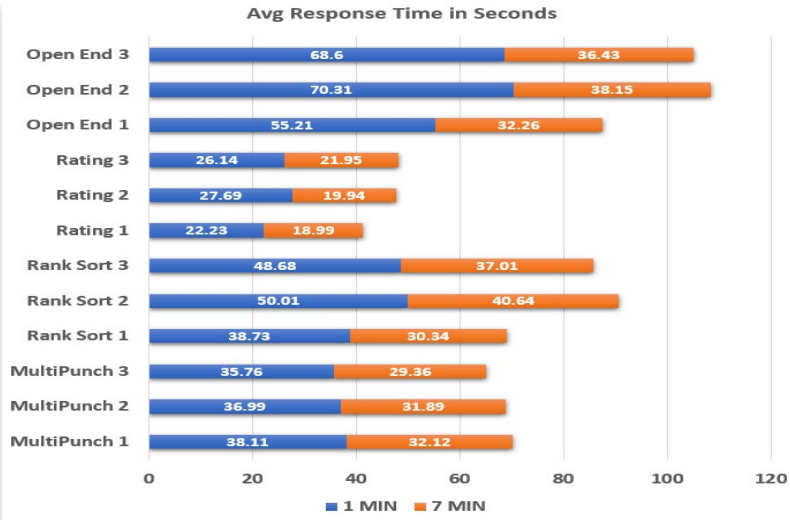
The results were telling across over seven thousand respondents. Here we have cross sections of engagement time at certain timed intervals. Better engagement means better data:







# Thought Leadership – By Greg Matheson, Quest Mindshare



In short, LOI certainly has an impact on engagement and engagement has an impact on data quality. While we are not yet at a point where we can apply a degradation factor, we are getting closer. What we do know is that the first 3-4 minutes are prime time and then attention wanes, sometimes dramatically. Pro tip: Don't waste prime time with unnecessary screening questions!

Fighting long surveys has been a tale as old as time. I've been doing this since 1996, so that time is, well, a lot of time... And no, I don't expect that to change but having a metric to understand the value of data when asked t certain timing intervals is a priority for us and it should be for you too.

In the meantime, lets improve trust in not only how respondents view us, but how users of our data trust our data. For more specifics on this RoR, check out [questmindshare.com](http://questmindshare.com) or reach out and any of our team members would be happy to help.

Greg Matheson

Co-CEO, Quest Mindshare



QUEST  
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## 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 12<sup>th</sup> and 24<sup>th</sup> 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 Canada. That said, it fares better than election & opinion polling companies.
- ✓ The value market research brings to businesses is recognized, but there's opportunity to boost perceptions as it relates to individuals.
- ✓ Survey length remains a concern in Canada and enjoyment dropped slightly vs. 2022.
- ✓ There continues to be widespread distrust in how industries, including market research, handle personal data.
- ✓ Canadian consumers are highly skeptical of all aspects of AI use in market research.





## Key Changes 2024 vs. 2022

- ✓ Though public trust in organizations declined slightly on a global basis, it's still a net positive in Canada.
  - Trust in **market research companies** held relatively steady.
  - While negative perceptions of **data analytics companies** persist worldwide, net trust remains positive in Canada.
  - Trust in **election & polling companies** declined slightly in Canada, though it's still a net positive overall.
- ✓ Across all countries, consumers perceived a greater personal benefit from market research.
- ✓ While net trust in market research and data analytics companies regarding protection and use of personal data in Canada is still negative, it's grown vs. 2022.



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



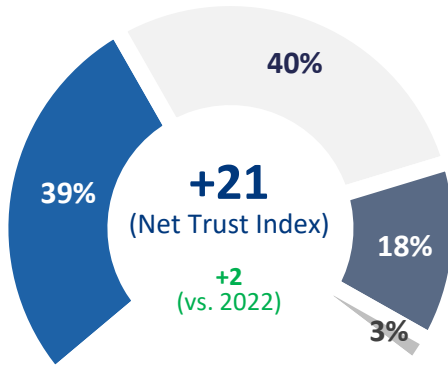


Public trust in market research companies remains a net positive overall in Canada.  
While data privacy practices continue to be a concern, net trust is on the rise vs. 2022.



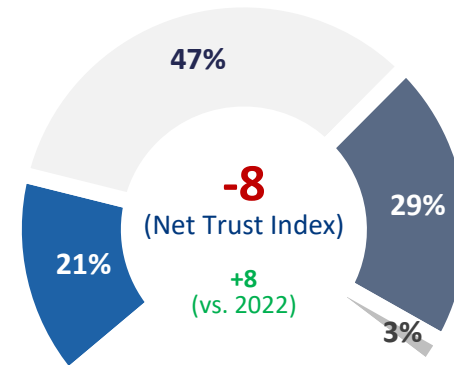
Canada

### 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 +16 (Market Research companies ranked 7<sup>th</sup> of 15)*

*Personal Data Trust Net Trust Index (NTI): Across the 15 industries/organizations analyzed, the average NTI was -5 (Market Research companies ranked 8<sup>th</sup> of 15)*

Base: Version 1 Respondents (503)

Base: Version 2 Respondents (497)



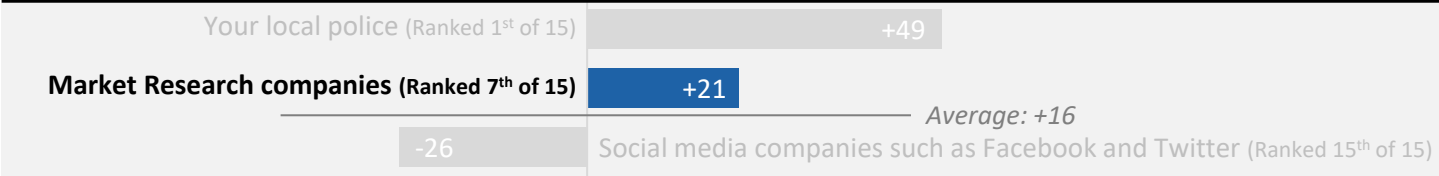


Compared to other surveyed organizations, market research companies rank in the middle for perceived trust and perceived use of personal data.

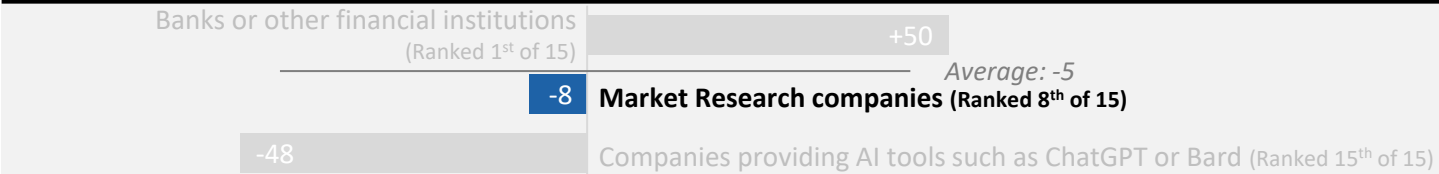


**Canada**

### 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.



Canada

30%

(No Change vs. 2022)

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

42%

(-4% vs. 2022)

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

27%

(-2% vs. 2022)

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

53%

(+4% 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 (503)

Base: Version 2 Respondents (497)

**LEVEL OF  
OVERALL TRUST**

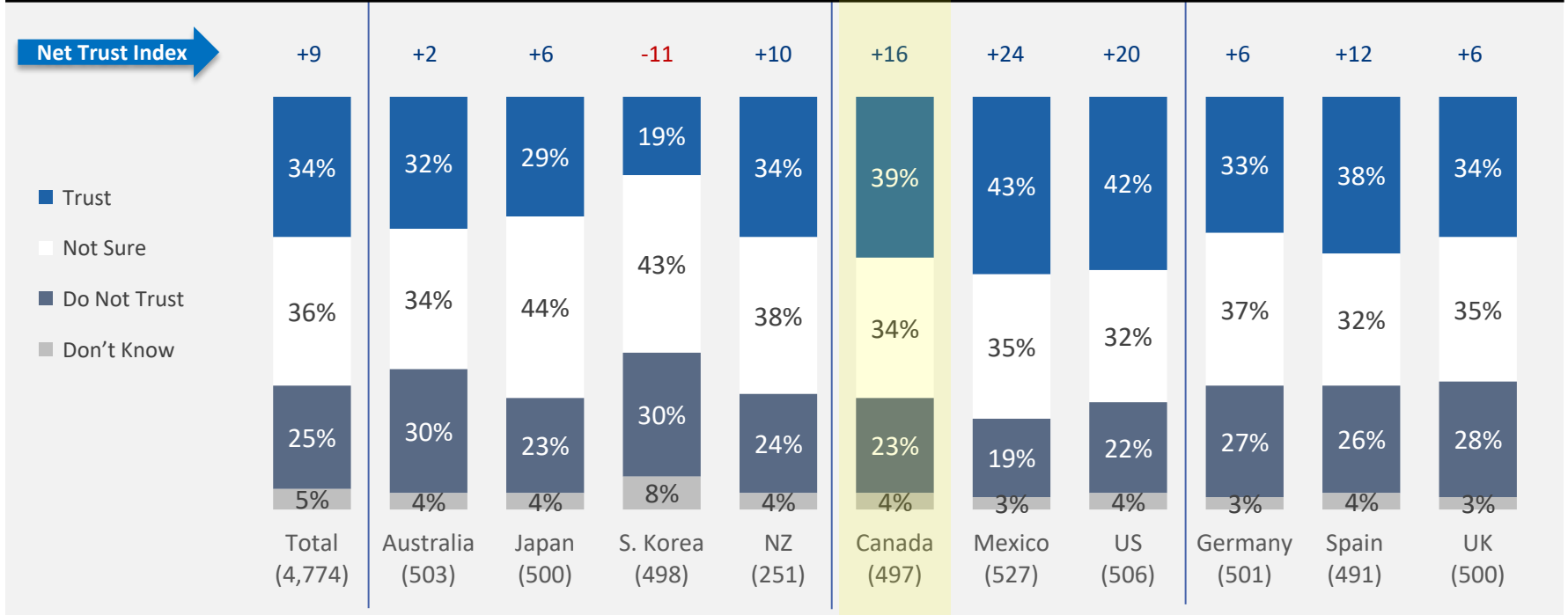




While there's a foundational level of trust in organizations/professionals around the world, most countries also exhibit a sizeable level of distrust. In this respect, Canada is slightly higher than the global average.



### Average Level of Trust Across Organizations/Professionals†










Net Trust Index = % Trust – % Do Not Trust

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



While trust in organizations dipped slightly on a net basis in Canada, it's still positive overall.

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

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



Canadians once again place the most trust in law enforcement, health authorities, retailers and finance. Market research companies rank in the middle, while companies using AI tools, the government (declined vs. '22) and social media incur the most doubt.



Canada

## Level of Trust by Organizations/Professionals



Net Trust Index = % Trust – % Do Not Trust

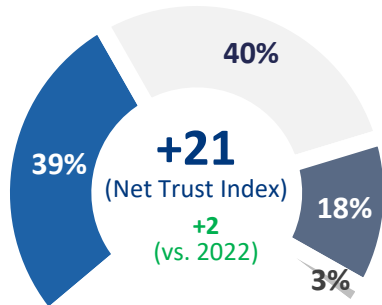


Market research and data analytics companies continue to command the most trust across the “insights space” in Canada, while net trust in election & polling companies has slightly eroded vs. 2022.

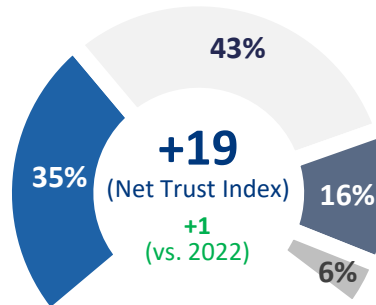


Canada

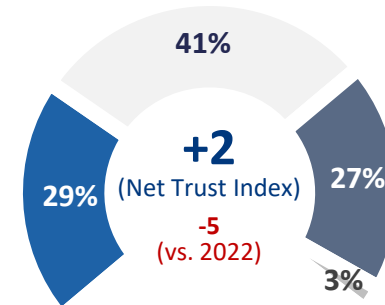
### Trust in Market Research



### Trust in Data Analytics



### Trust in Election & Opinion Polling



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

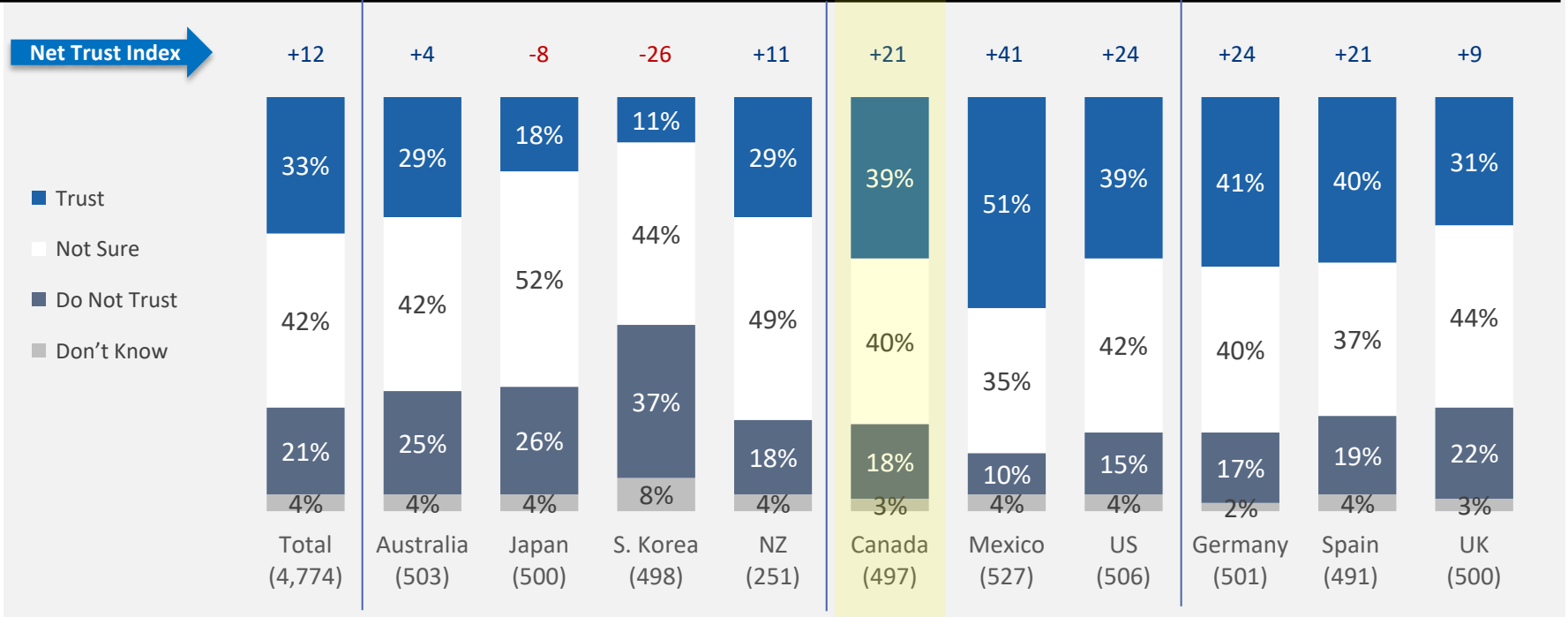
*Net Trust Index = % Trust – % Do Not Trust*



Trust in market research companies varies greatly by country and cultural bias certainly plays a part in this variation. In Canada, net trust is higher than the global average.



### Trust in Market Research










Net Trust Index = % Trust – % Do Not Trust





In Canada, trust in market research is fairly stable vs. 2022 and well above the global average.

## Trust in Market Research - Trended to 2022

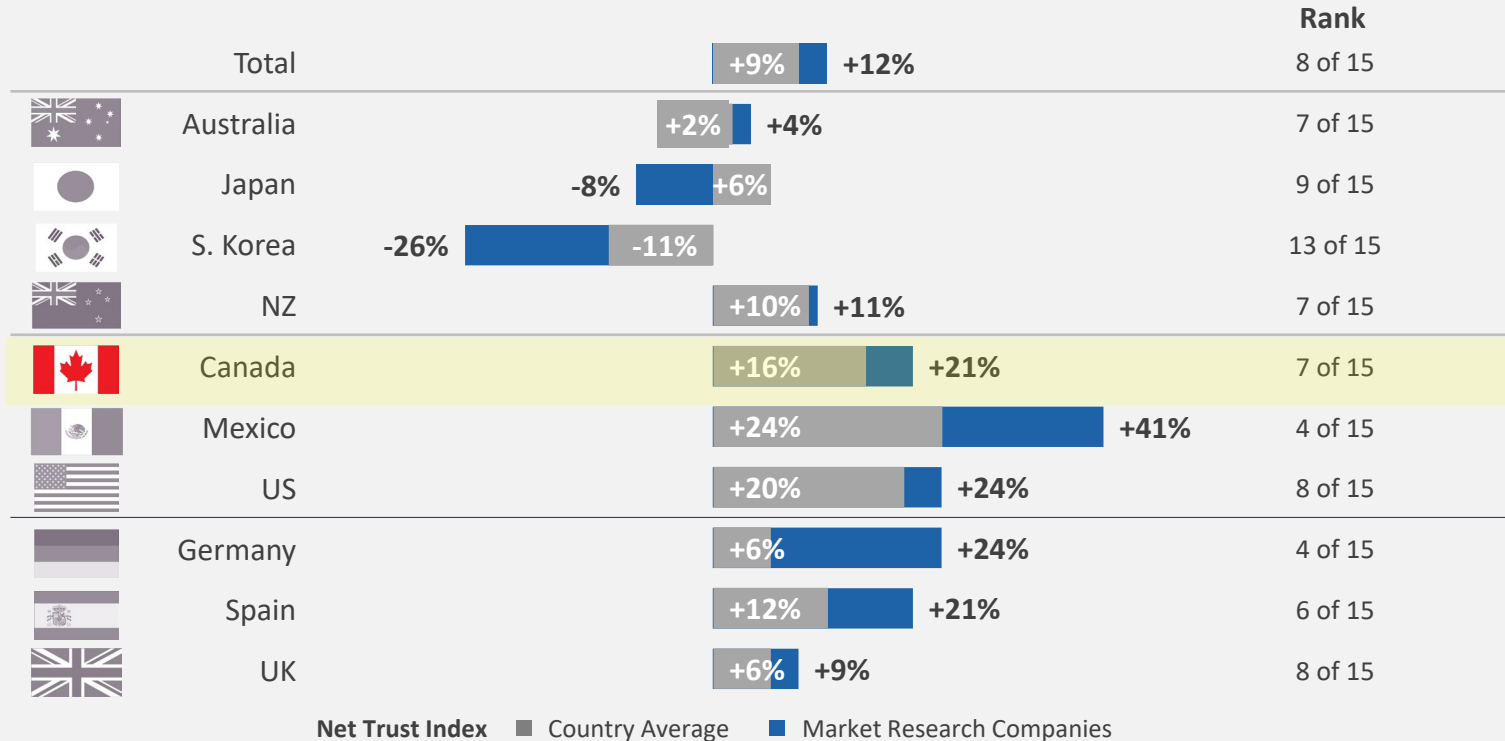
	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK
<b>Net Trust Index</b> →	2024	+7	+4	-8	+21	+24	+24	+9
	vs. 2022	--	-3	+5	+3	+2	+2	+1
<b>% Trust</b> →	2024	30%	29%	18%	39%	39%	41%	31%
	vs. 2022	+1%	--	+3%	+3%	+2%	+5%	-2%
<b>% Do Not Trust</b> →	2024	23%	25%	26%	18%	15%	17%	22%
	vs. 2022	+2%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

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



In Canada, trust in market research typically ranks in the middle of the pack, aligning with the global average.

### Trust in Market Research (vs. Country Average)



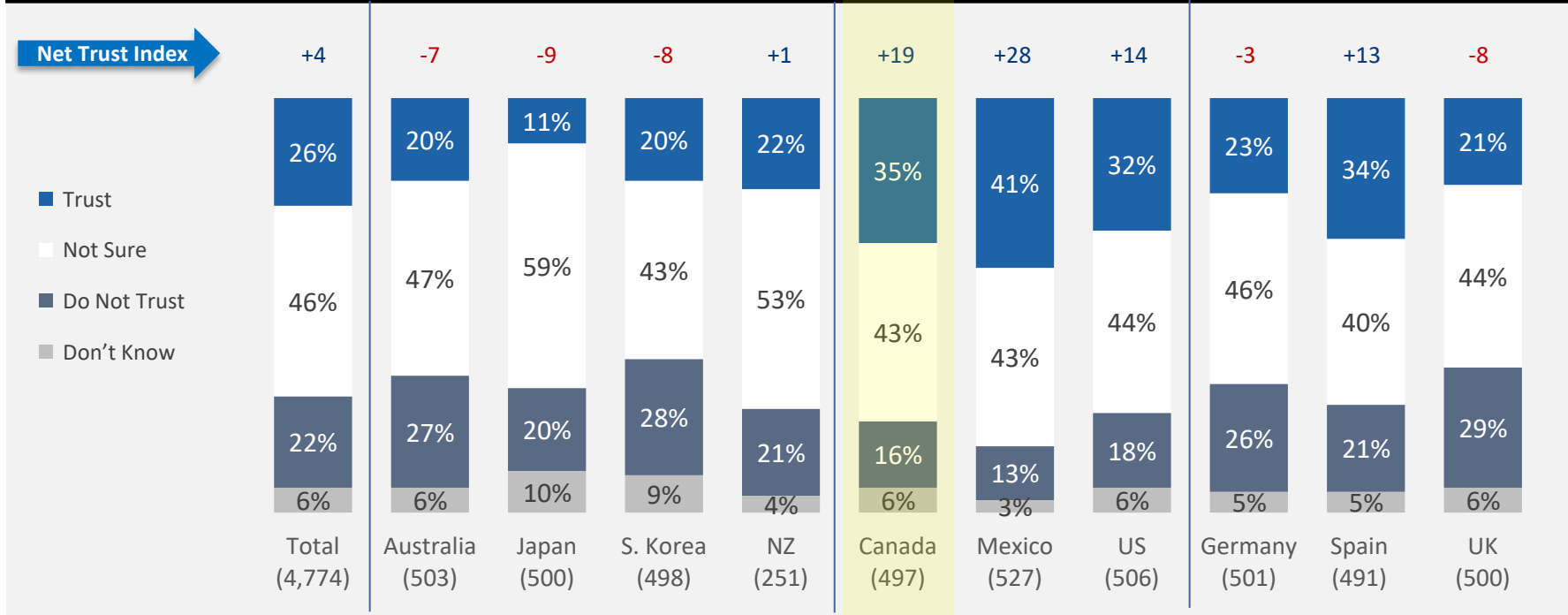
Net Trust Index = % Trust – % Do Not Trust



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



Net perceptions for trust in data analytics remain positive in Canada and stable vs. 2022.

## Trust in Data Analytics - Trended to 2022

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

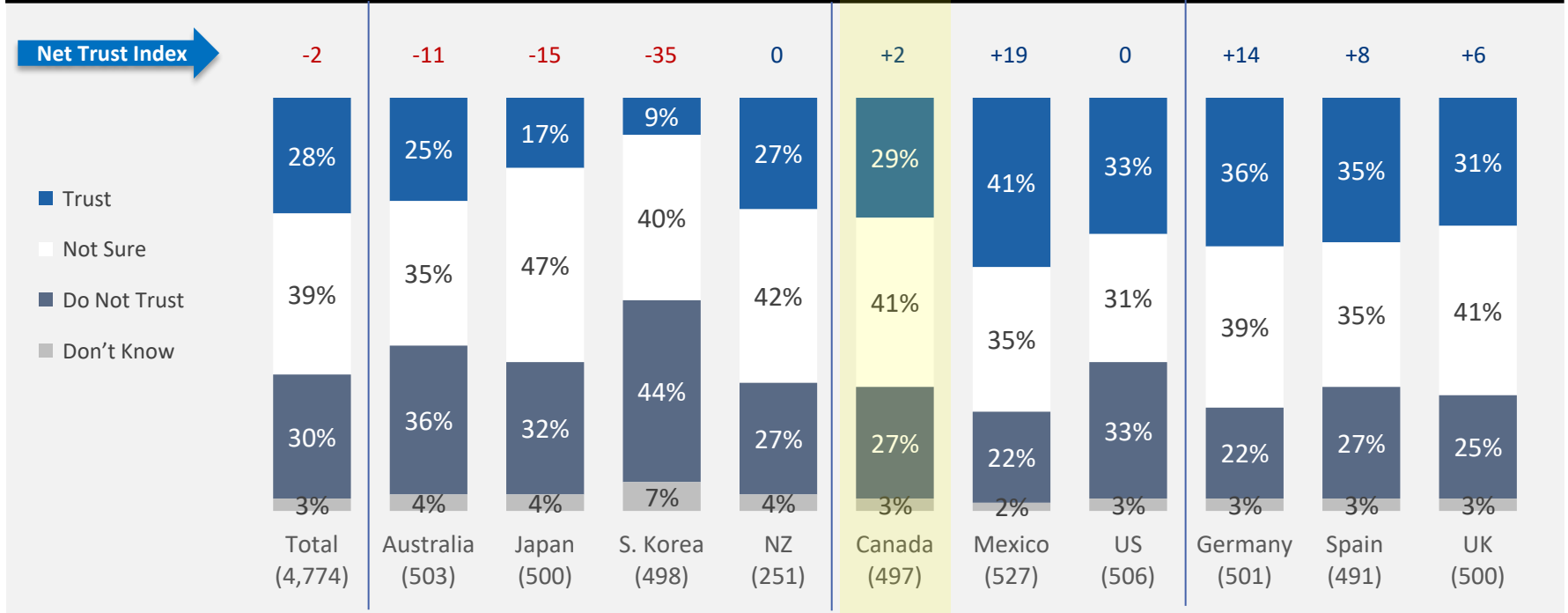
Net Trust Index = % Trust – % Do Not Trust  
\*Total based on comparable countries across waves.



On a net basis, trust in election & polling is somewhat divided among Canadians.



### 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
<b>Net Trust Index</b>	<b>2024</b>	<b>-6</b>	<b>-11</b>	<b>-15</b>	<b>+2</b>	<b>--</b>	<b>+14</b>	<b>+6</b>
	<b>vs. 2022</b>	<b>-1</b>	<b>+4</b>	<b>+5</b>	<b>-5</b>	<b>+5</b>	<b>-3</b>	<b>--</b>
<b>% Trust</b>	<b>2024</b>	<b>26%</b>	<b>25%</b>	<b>17%</b>	<b>29%</b>	<b>33%</b>	<b>36%</b>	<b>31%</b>
	<b>vs. 2022</b>	<b>+1%</b>	<b>+5%</b>	<b>+3%</b>	<b>-5%</b>	<b>+4%</b>	<b>+1%</b>	<b>-3%</b>
<b>% Do Not Trust</b>	<b>2024</b>	<b>31%</b>	<b>36%</b>	<b>32%</b>	<b>27%</b>	<b>33%</b>	<b>22%</b>	<b>25%</b>
	<b>vs. 2022</b>	<b>+1%</b>	<b>+1%</b>	<b>-2%</b>	<b>--</b>	<b>-1%</b>	<b>+4%</b>	<b>-3%</b>

*Net Trust Index = % Trust – % Do Not Trust*

*\*Total based on comparable countries across waves.*

**BELIEVABILITY THAT  
MARKET RESEARCH  
IS BENEFICIAL**





While the value of market research is still more apparent for businesses than for individuals in Canada, it's on the rise vs. 2022 for the latter.

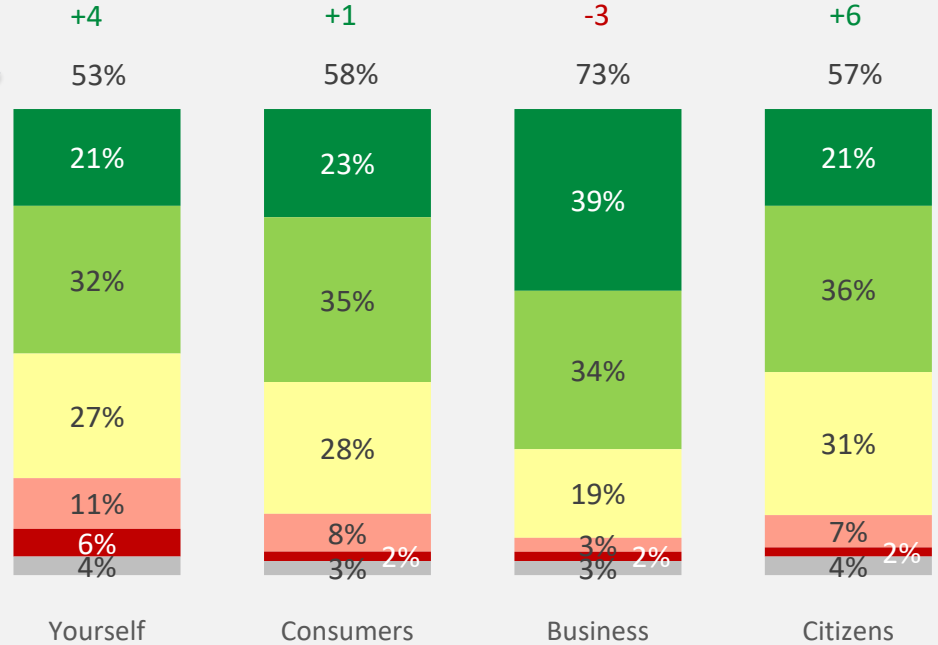


### Extent Market Research is Perceived to be Beneficial

Vs. 2022



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



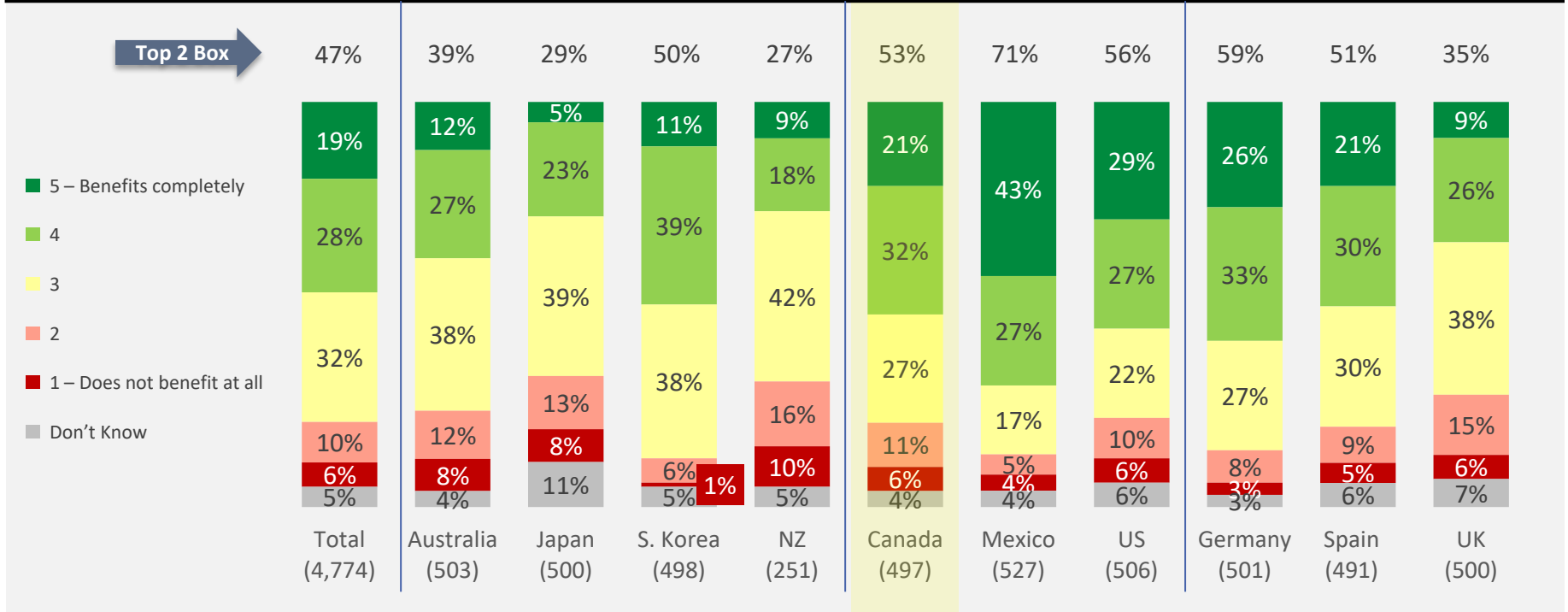




Overall, less than half feel that market research benefits them. In this regard, Canada is slightly above the global average.



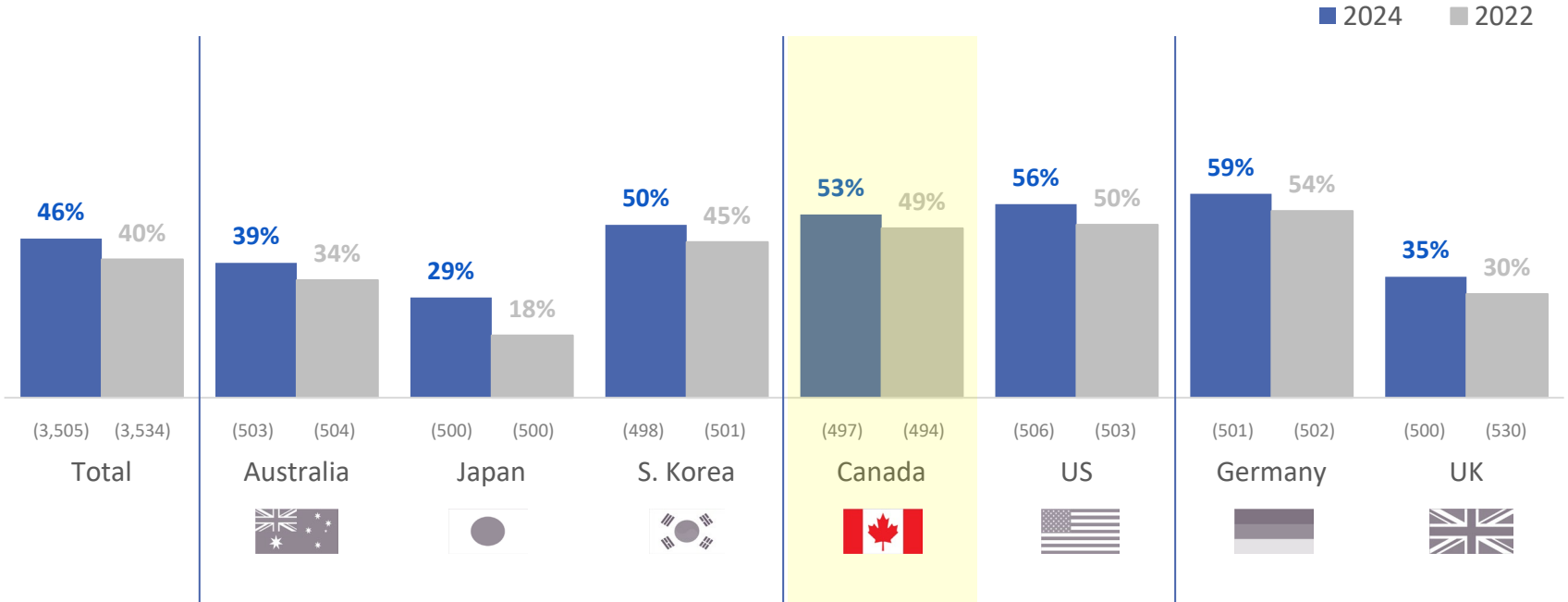
### Extent Market Research is Perceived to be Beneficial to Yourself





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

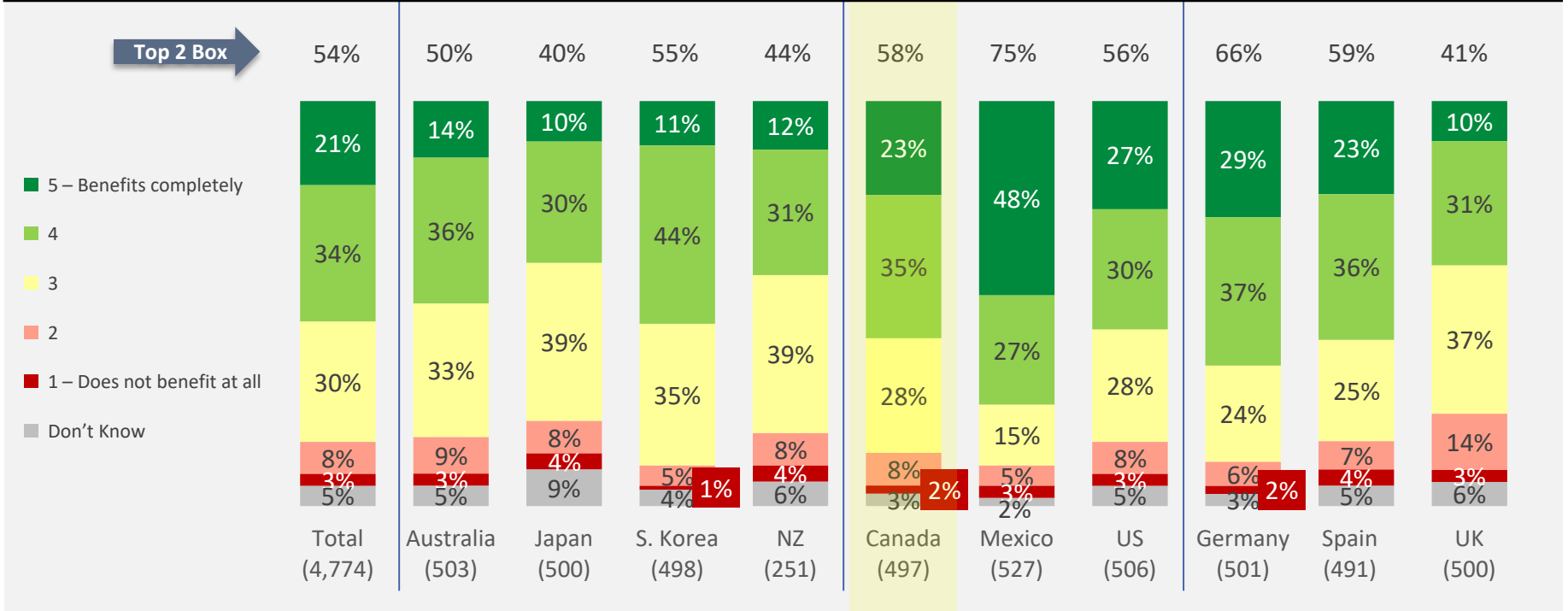




Most recognize some benefit of market research to consumers.



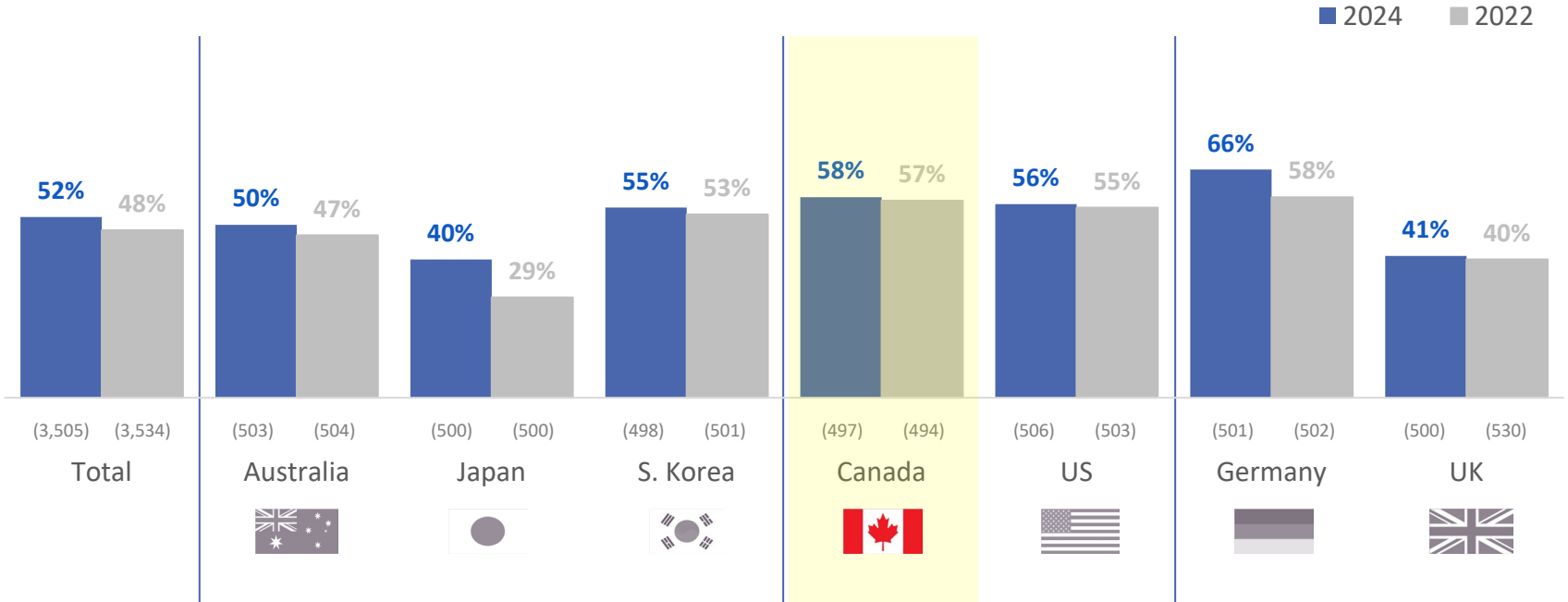
Extent Market Research is Perceived to be Beneficial to Consumers





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

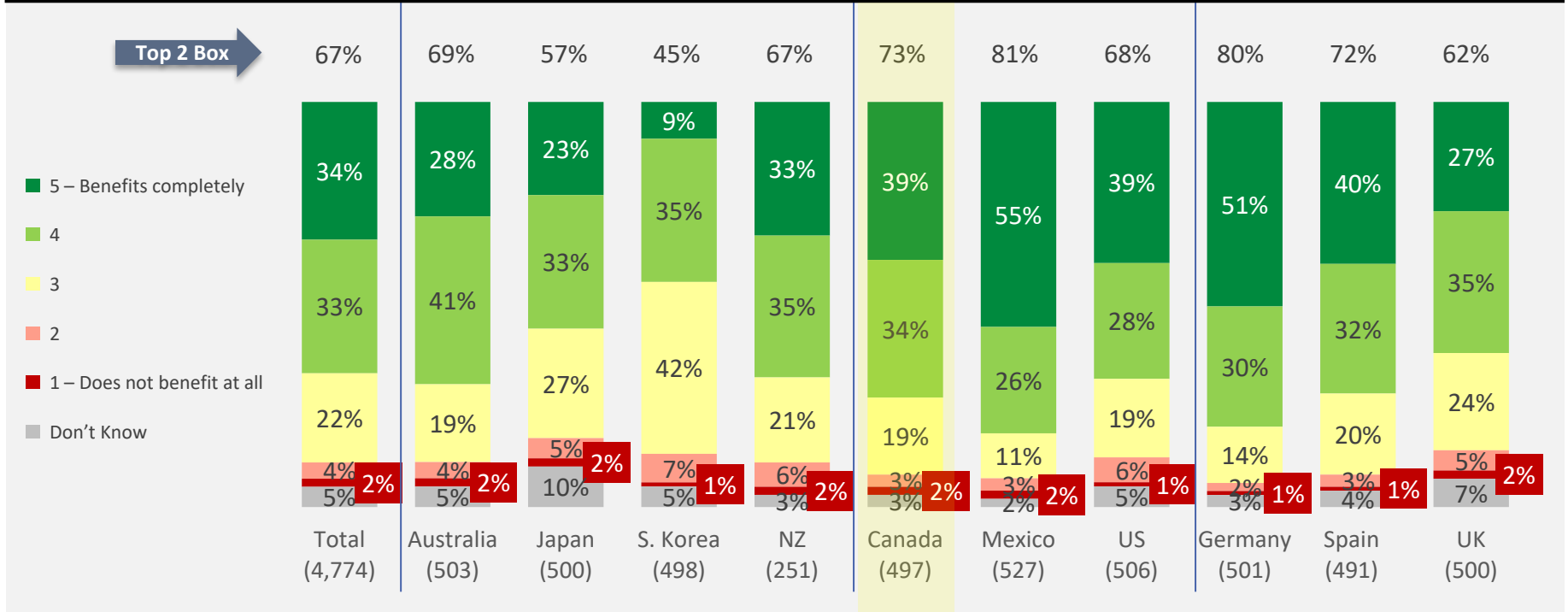




Many consider market research highly beneficial to businesses, with Canada performing slightly above the global average in this regard.



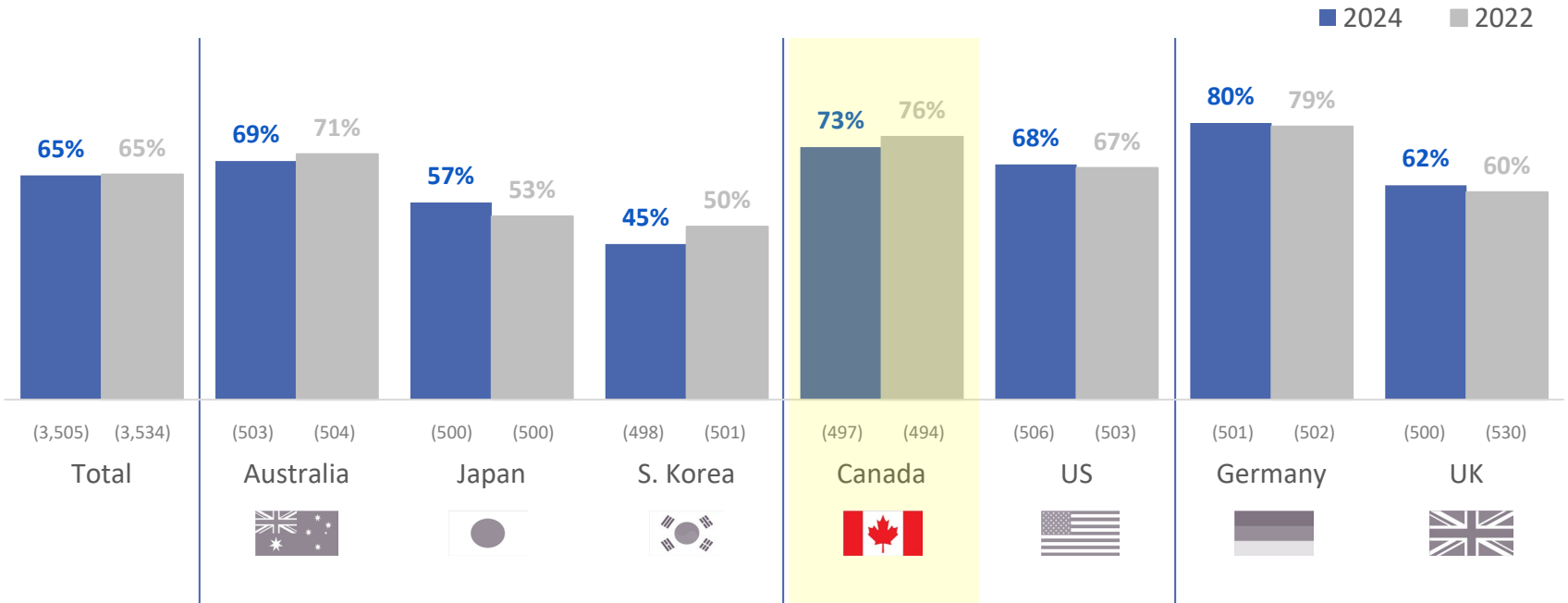
### Extent Market Research is Perceived to be Beneficial to Business





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

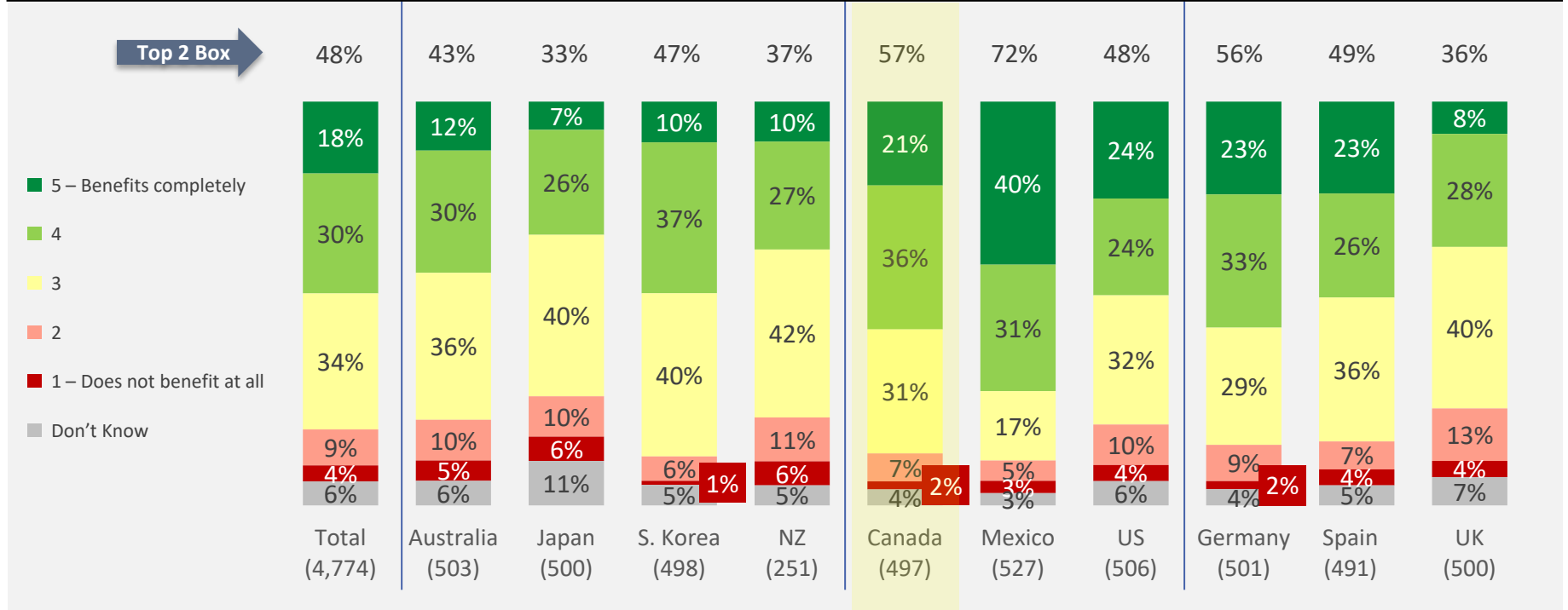




Less than half recognize the benefits of market research to citizens, with Canada performing above the global average in this respect.



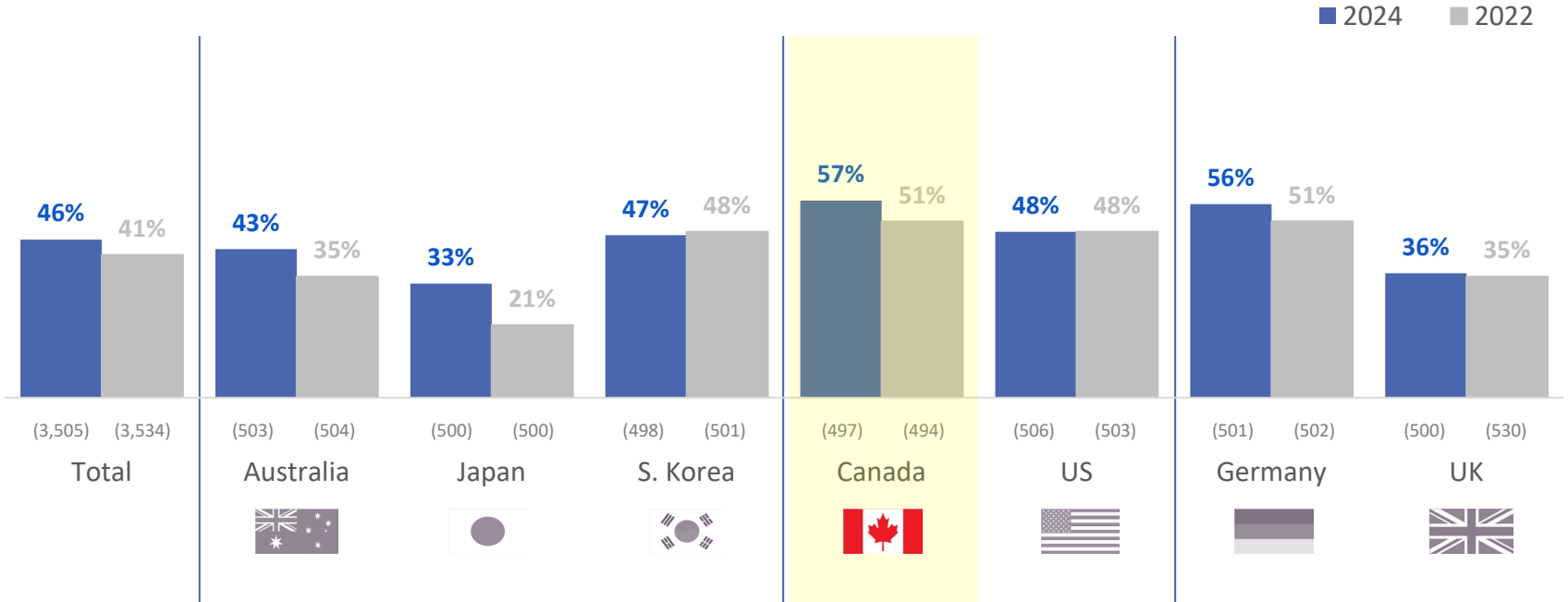
### Extent Market Research is Perceived to be Beneficial to Citizens





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

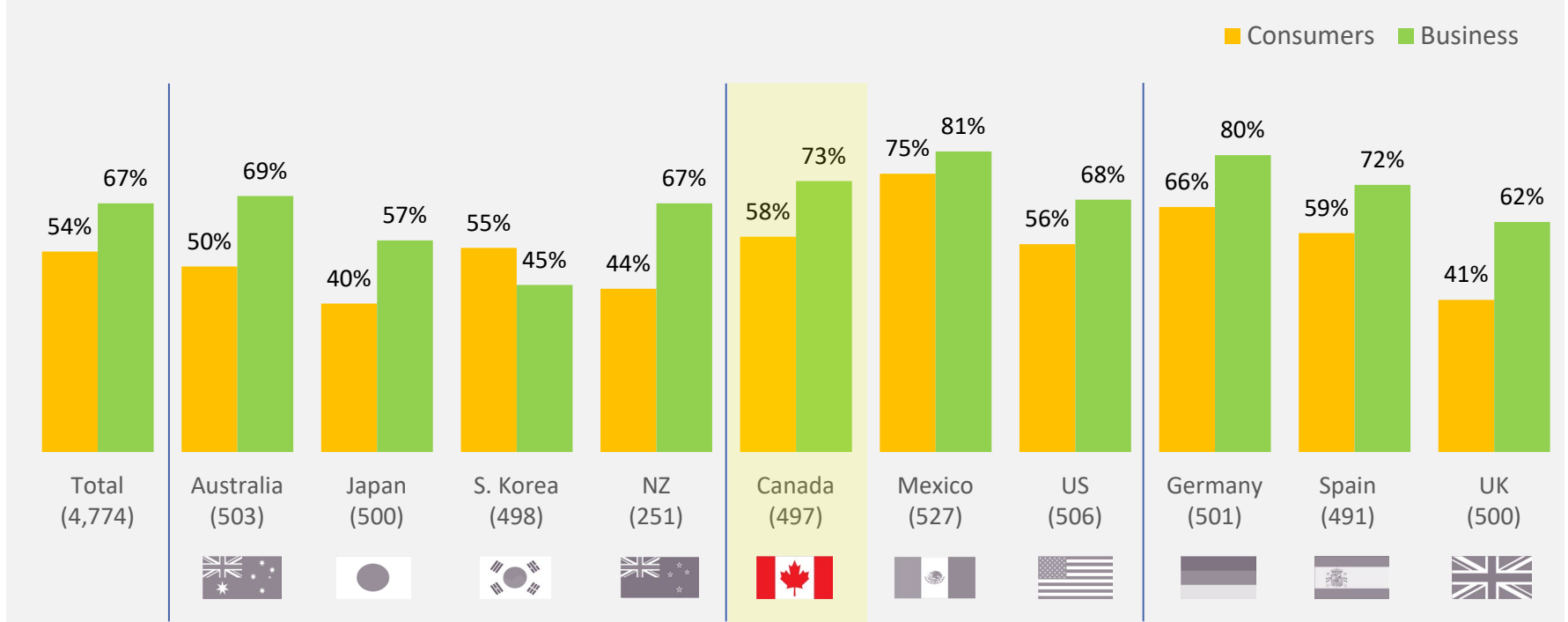






Globally, market research is deemed more beneficial to businesses vs. consumers.

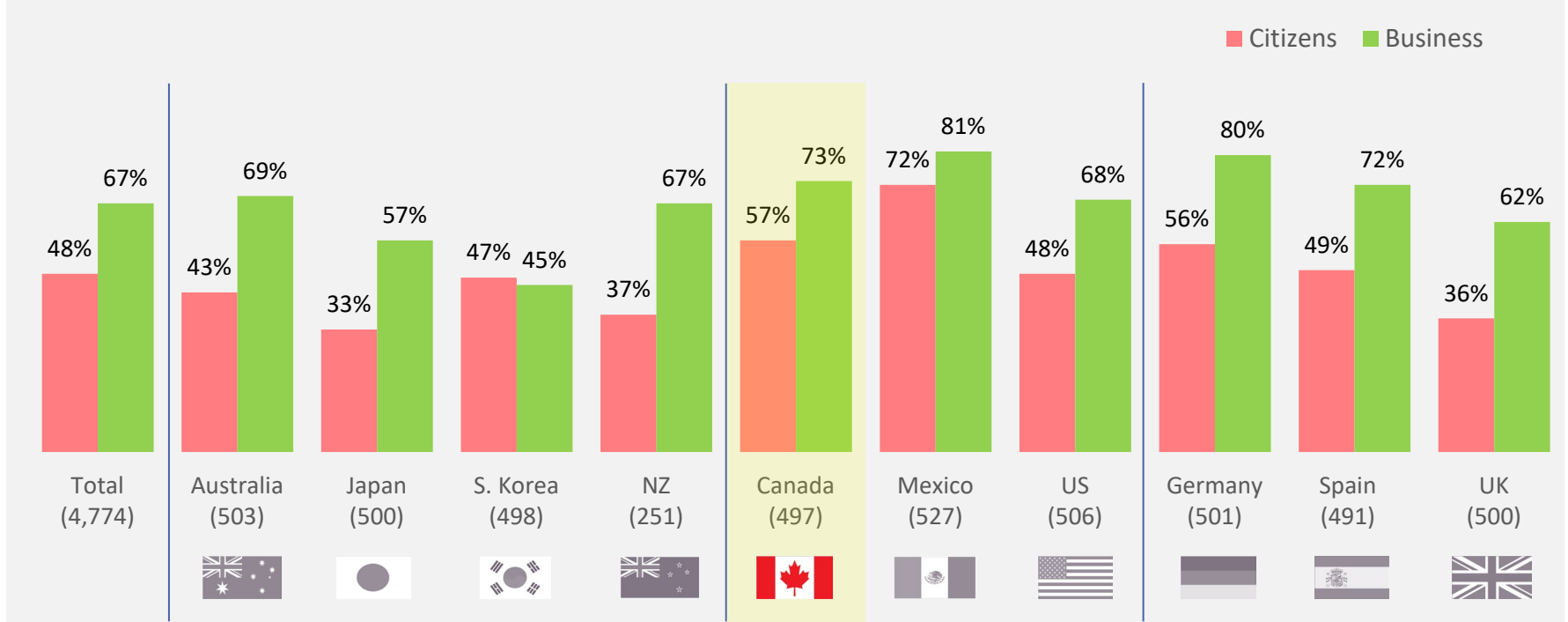
## Extent Market Research is Perceived to be Beneficial to Consumers vs. Business (Top 2 Box)



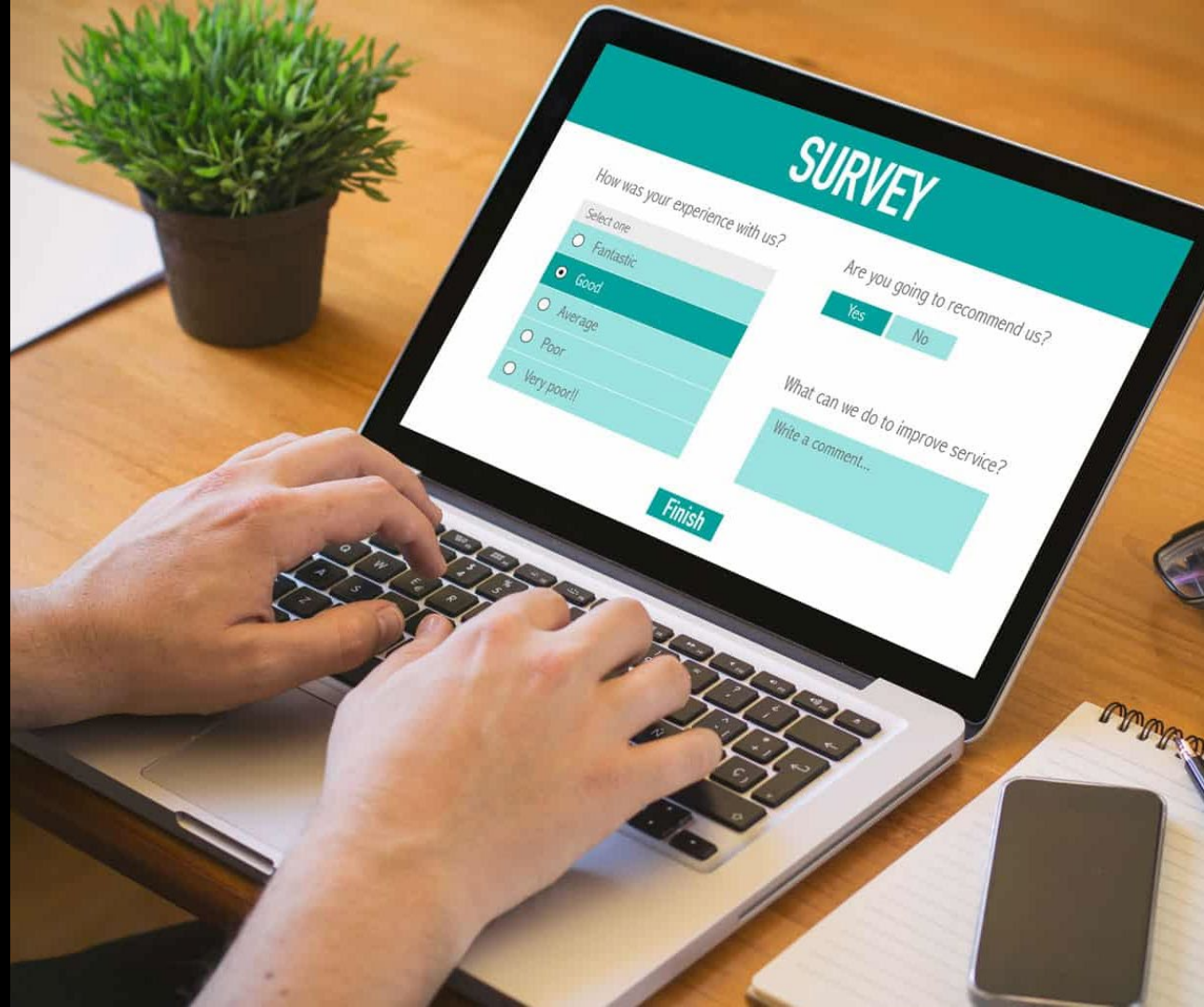


Likewise, market research is considered much more beneficial to businesses than to citizens on a global basis.

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



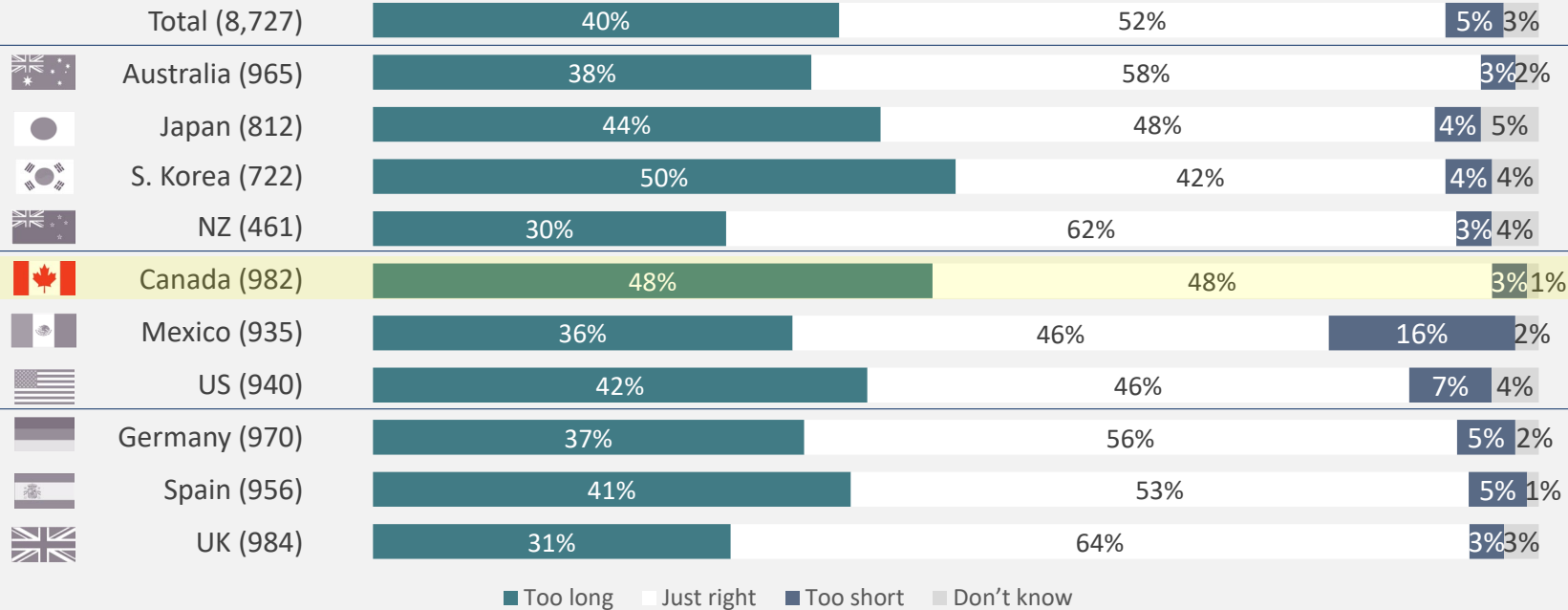
## REACTIONS TO THE PARTICIPANT EXPERIENCE





While survey length is generally considered acceptable, there's a sizeable portion, especially in South Korea and Canada, who would appreciate shorter surveys.

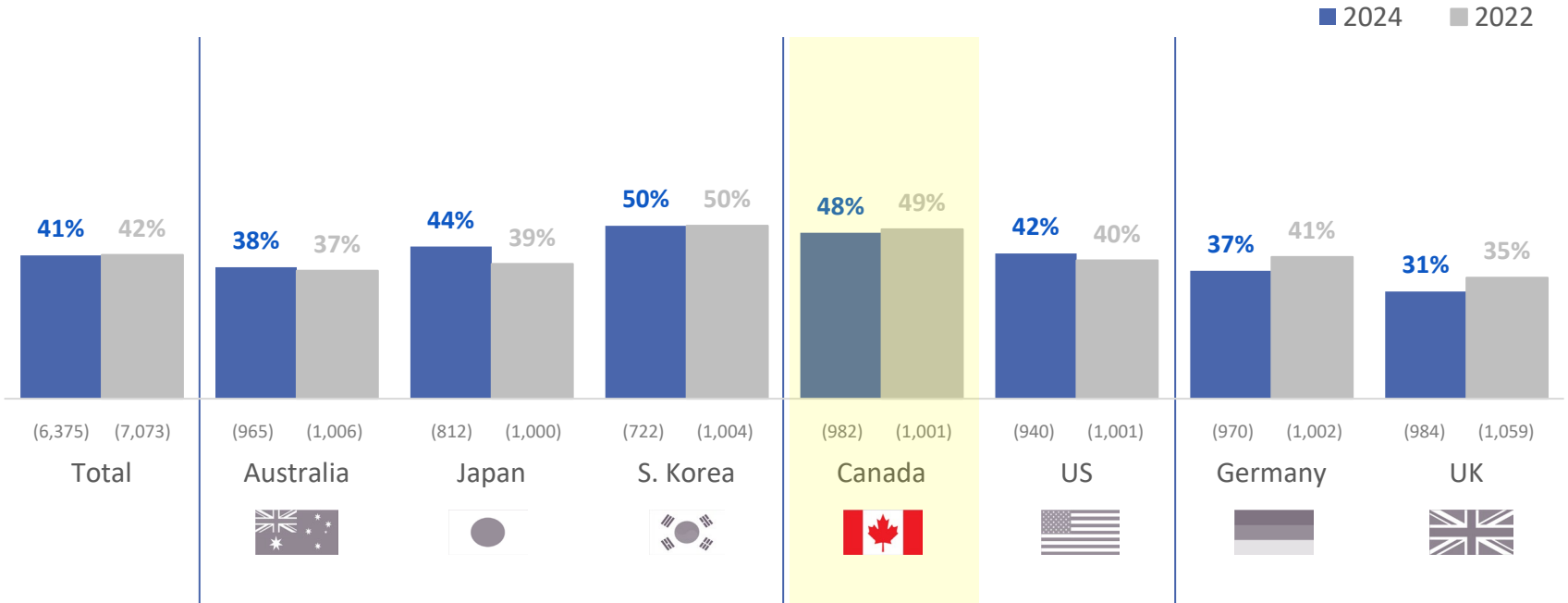
## Perception of Survey Length





Survey length concerns are largely consistent with 2022.

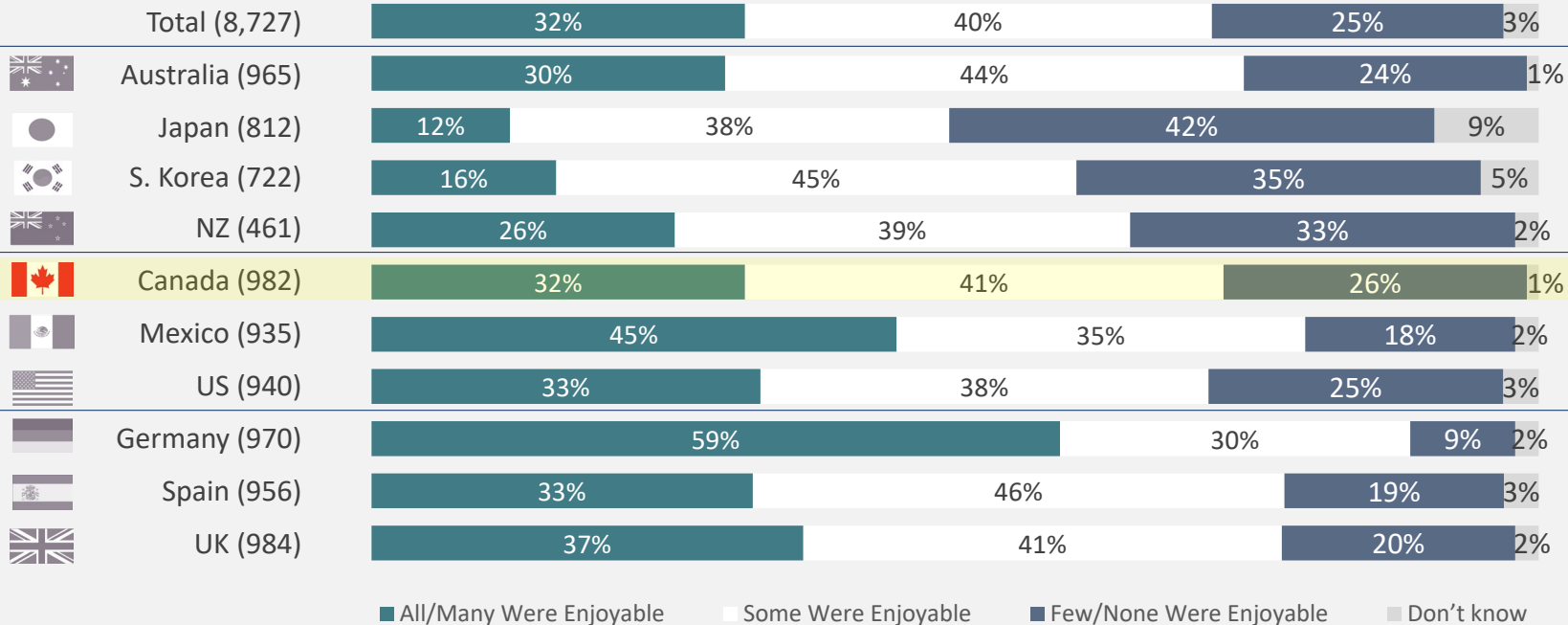
## Perception of Survey Length (Too Long) - Trended to 2022





Survey enjoyment varies greatly across countries – Canadians are enjoying their survey experiences on par with the global average.

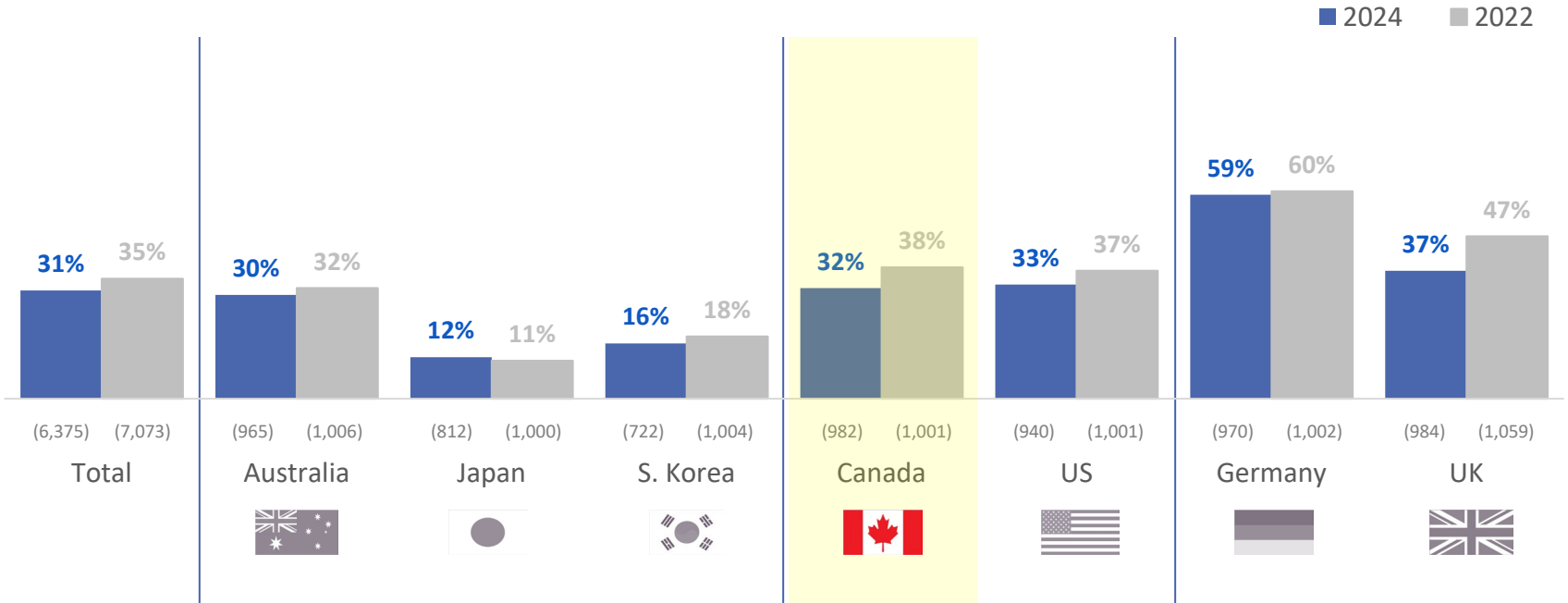
### Perception of Survey Enjoyability





While survey enjoyment remains relatively stable across most countries vs. 2022, there are slight declines in Canada and the UK.

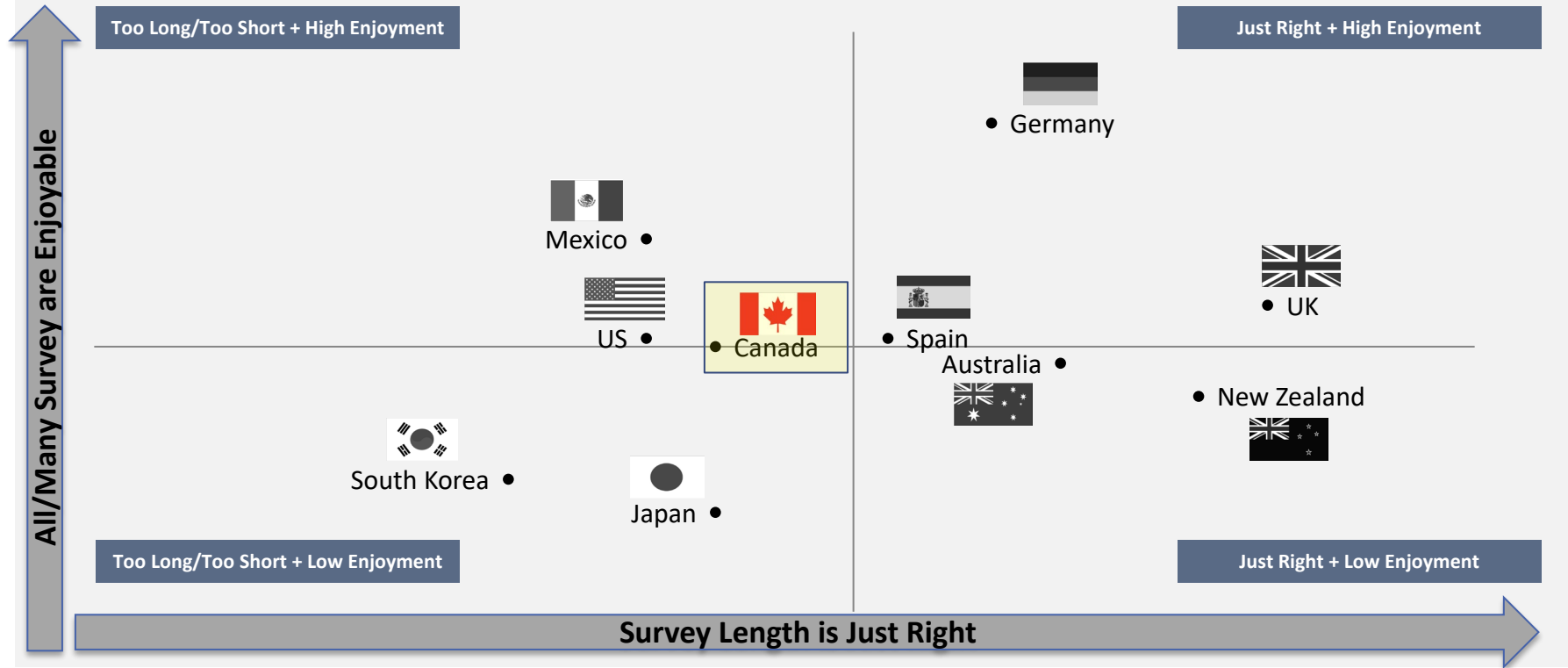
### Perception of Survey Enjoyability (All/Many Were Enjoyable) - Trended to 2022





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 are aware of how their personal data is collected and used in Canada, some are unfamiliar, indicating a need for education.



Canada



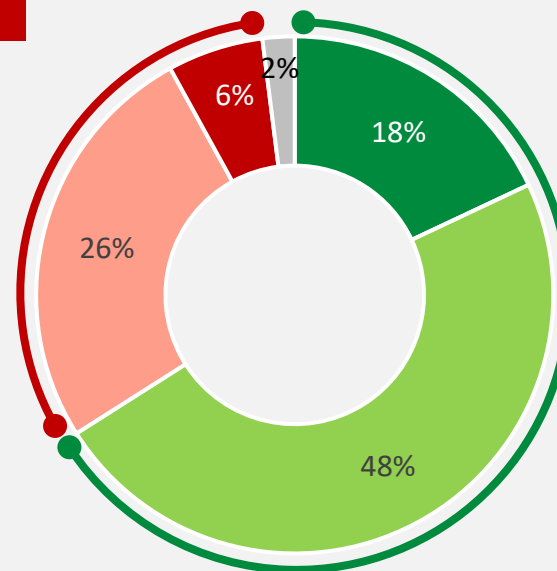
## Familiarity with Personal Data Collection & Use

Not Very/At All Familiar

2024: 32%

Very/Somewhat Familiar

2024: 66%



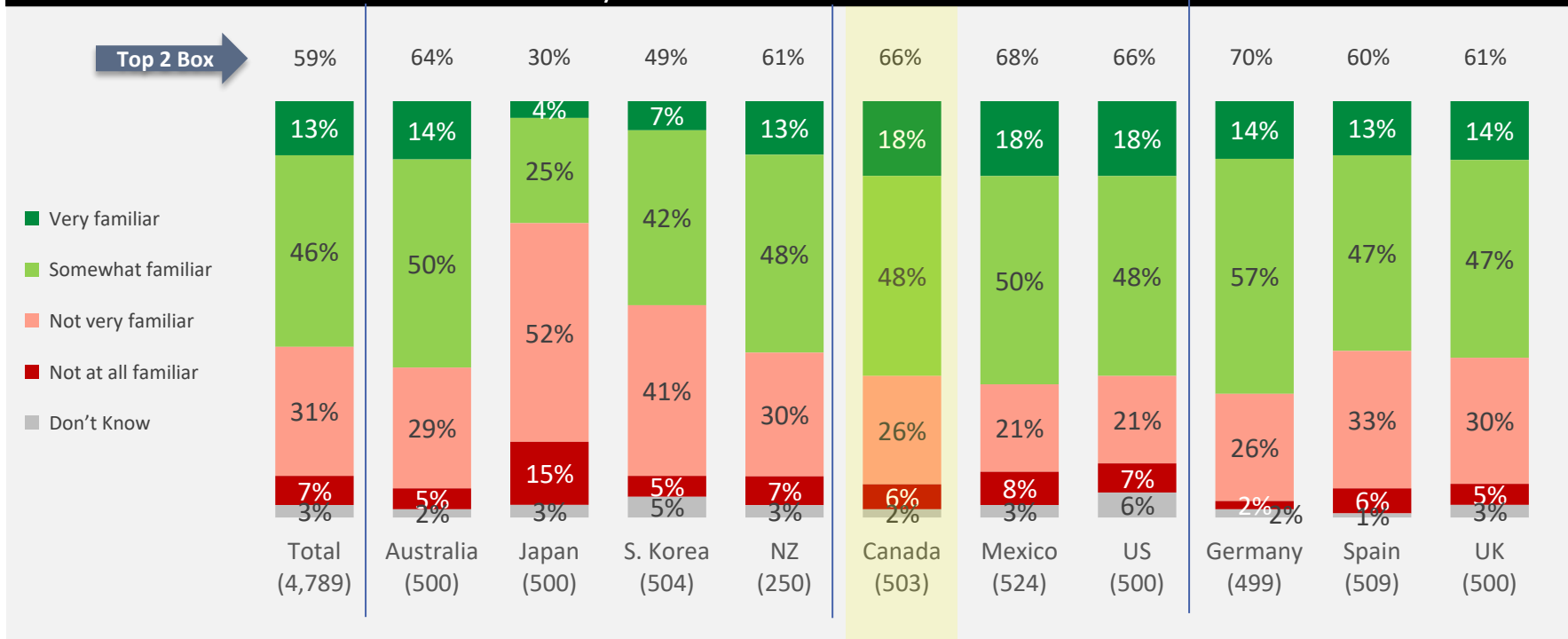
Very familiar Somewhat familiar Not very familiar Not at all familiar Don't Know



Knowledge of personal data collection and usage practices in Canada is slightly above the global average.



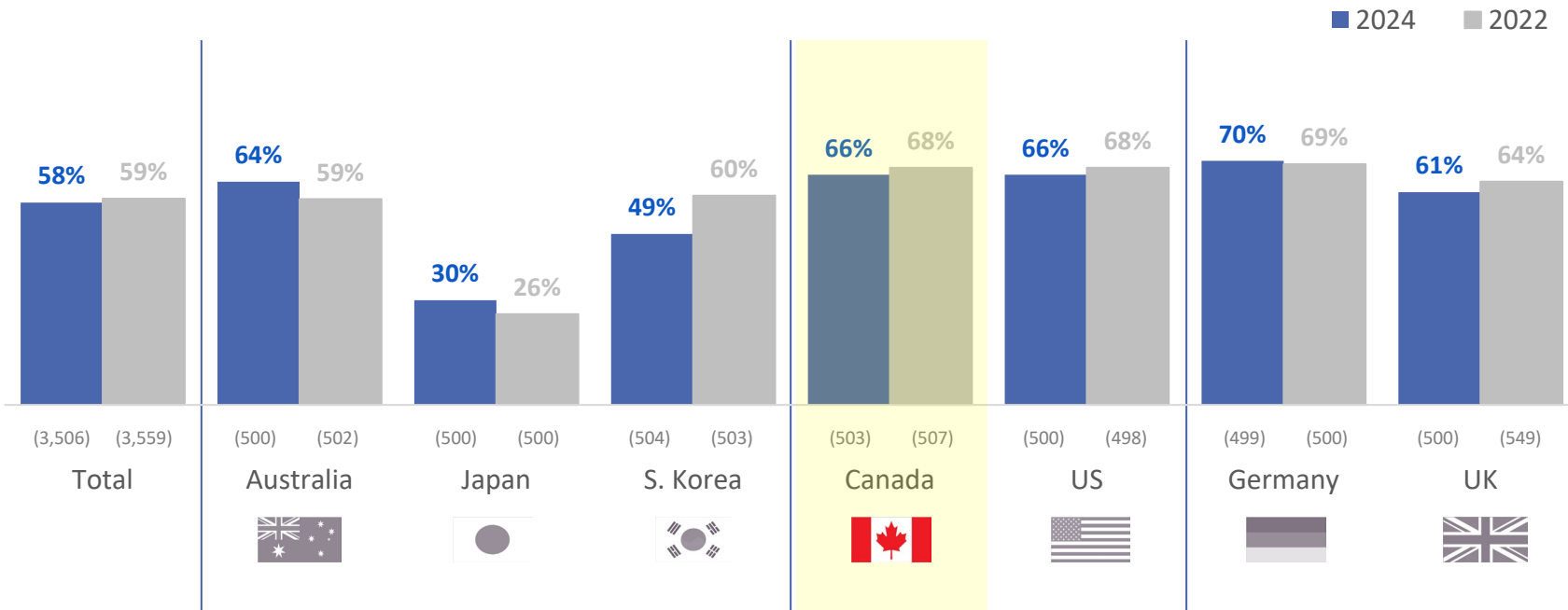
### Familiarity with Personal Data Collection & Use





Familiarity is largely stable in Canada 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 major concern for Canadians.



Canada



### Level of Concern Regarding Misuse of Personal Data

Not Very/At All Concerned

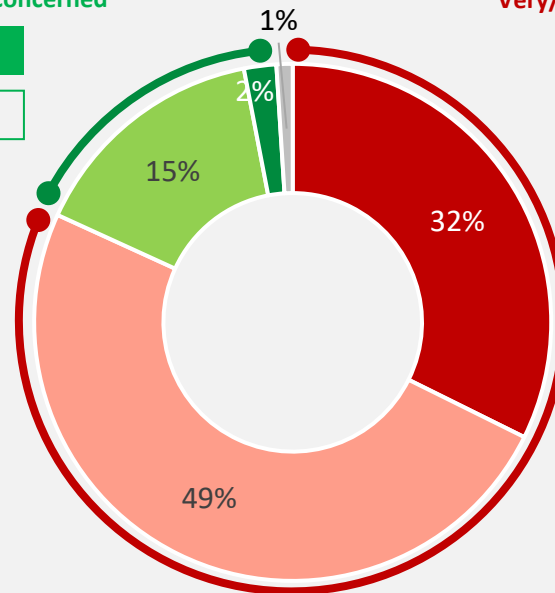
2024: 17%

2022: 14%

Very/Somewhat Concerned

2024: 82%

2022: 85%



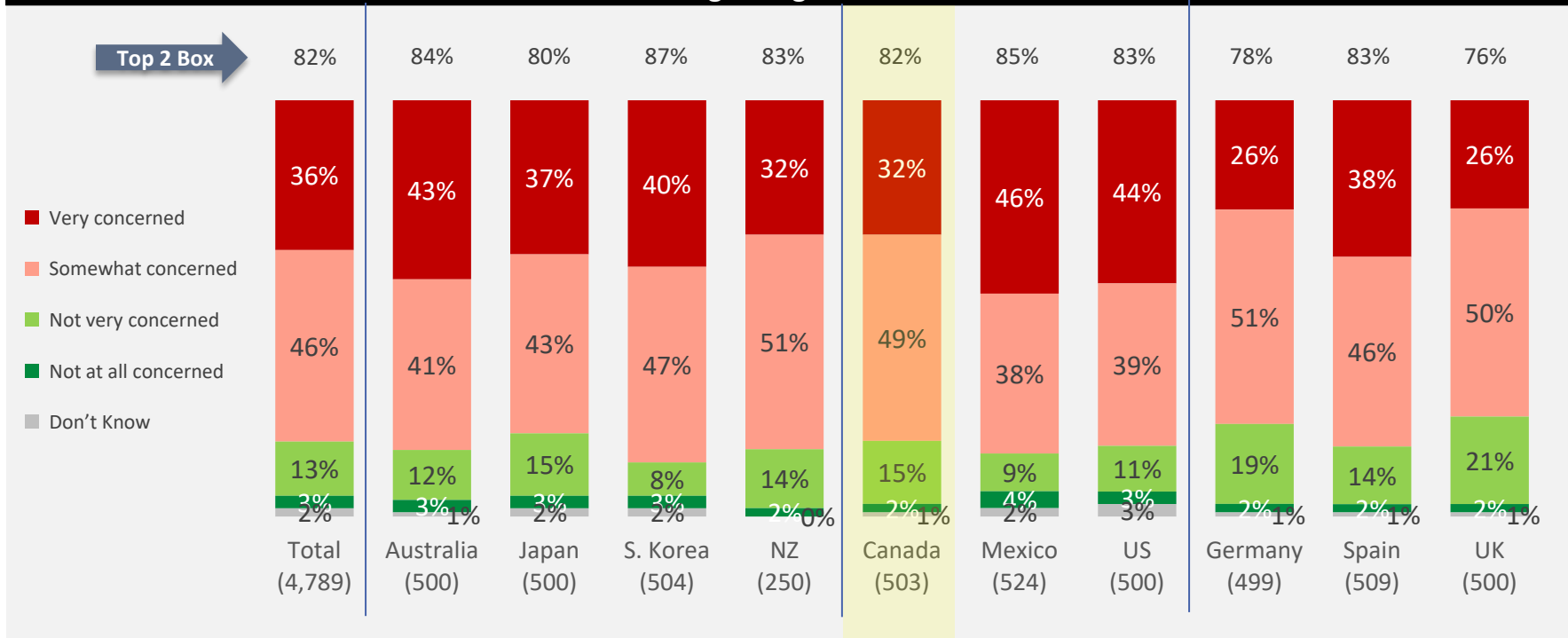
- Very concerned
- Somewhat concerned
- Not very concerned
- Not at all concerned
- Don't know/Prefer not to say



Concerns about the misuse of personal data are consistent globally.



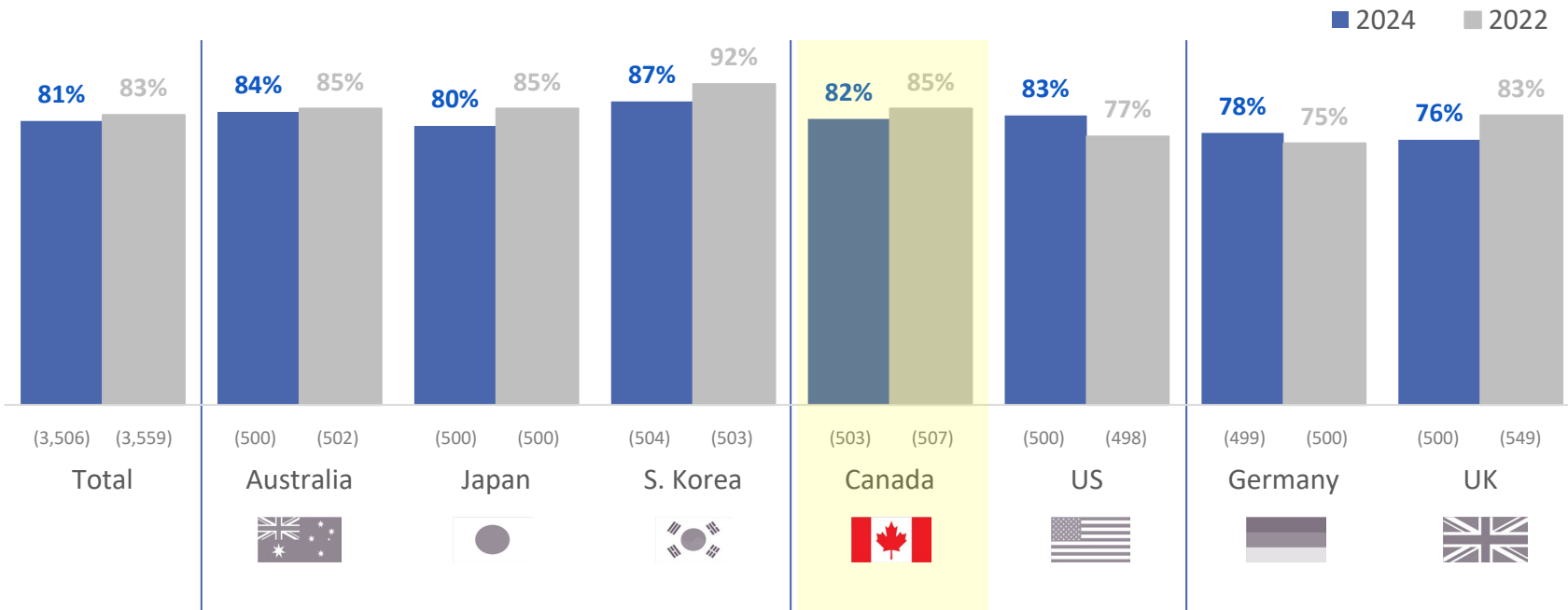
### Level of Concern Regarding Misuse of Personal Data





While high, concerns about misuse of data are largely consistent with 2022 in Canada.

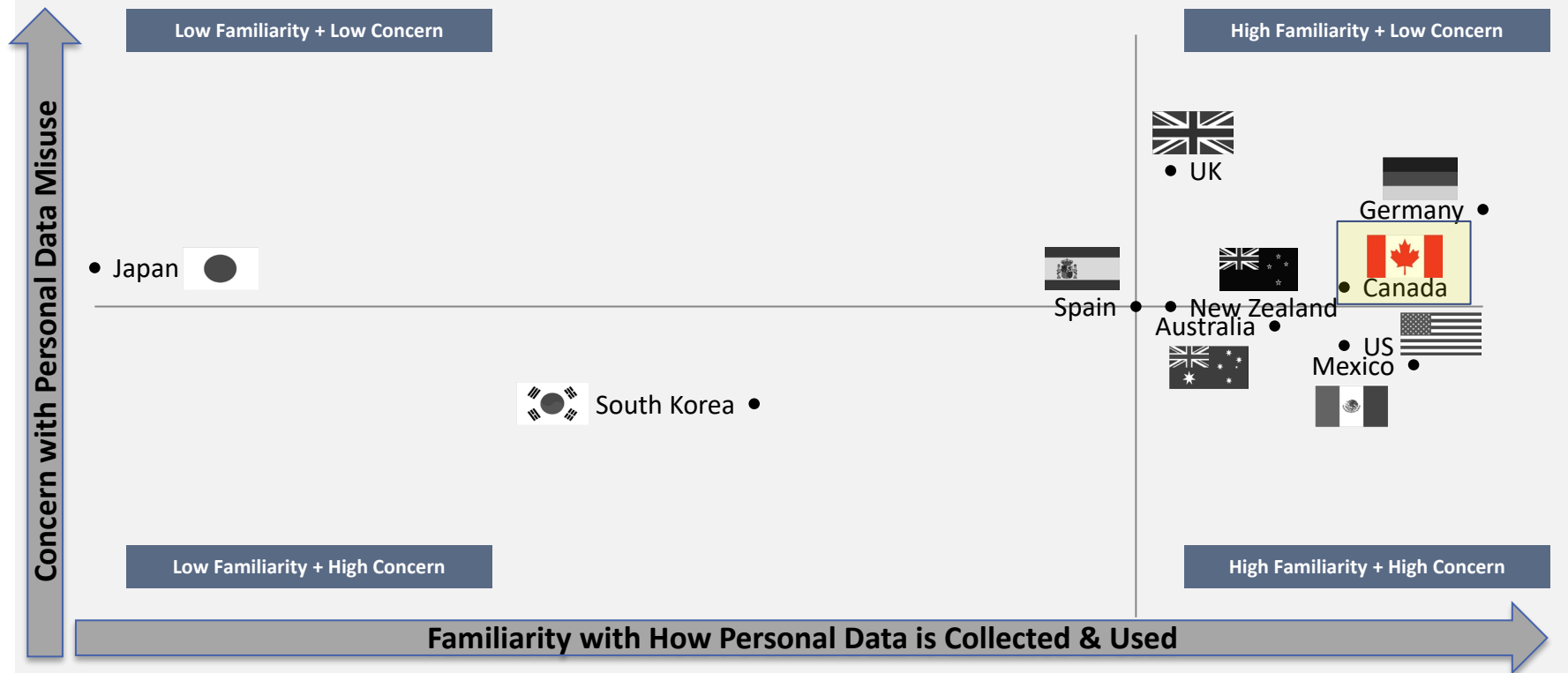
### Level of Concern Regarding Misuse of Personal Data (Top 2 Box % - Very/Somewhat Concerned) - Trended to 2022





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**

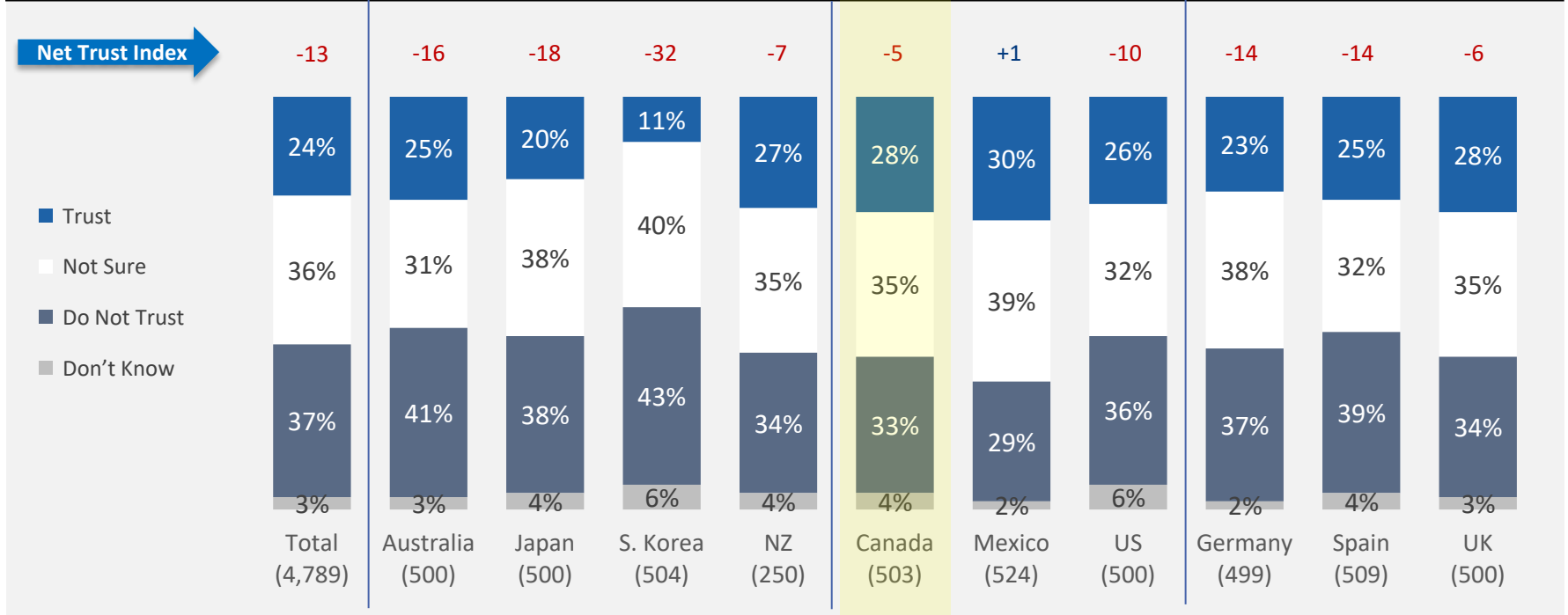




Concern exists in all countries regarding trust in organizations' abilities to protect and use consumer data responsibly. In this regard, Canada is higher than the global average.



### 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	
<b>Net Trust Index</b> →	2024	-14	-16	-18	-32	-5	-10	-14	-6
	vs. 2022	-6	-4	-6	-7	-5	-6	-12	-8
<b>% Trust</b> →	2024	23%	25%	20%	11%	28%	26%	23%	28%
	vs. 2022	-3%	-1%	+1%	-1%	-4%	-4%	-6%	-4%
<b>% Do Not Trust</b> →	2024	37%	41%	38%	43%	33%	36%	37%	34%
	vs. 2022	+4%	+3%	+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

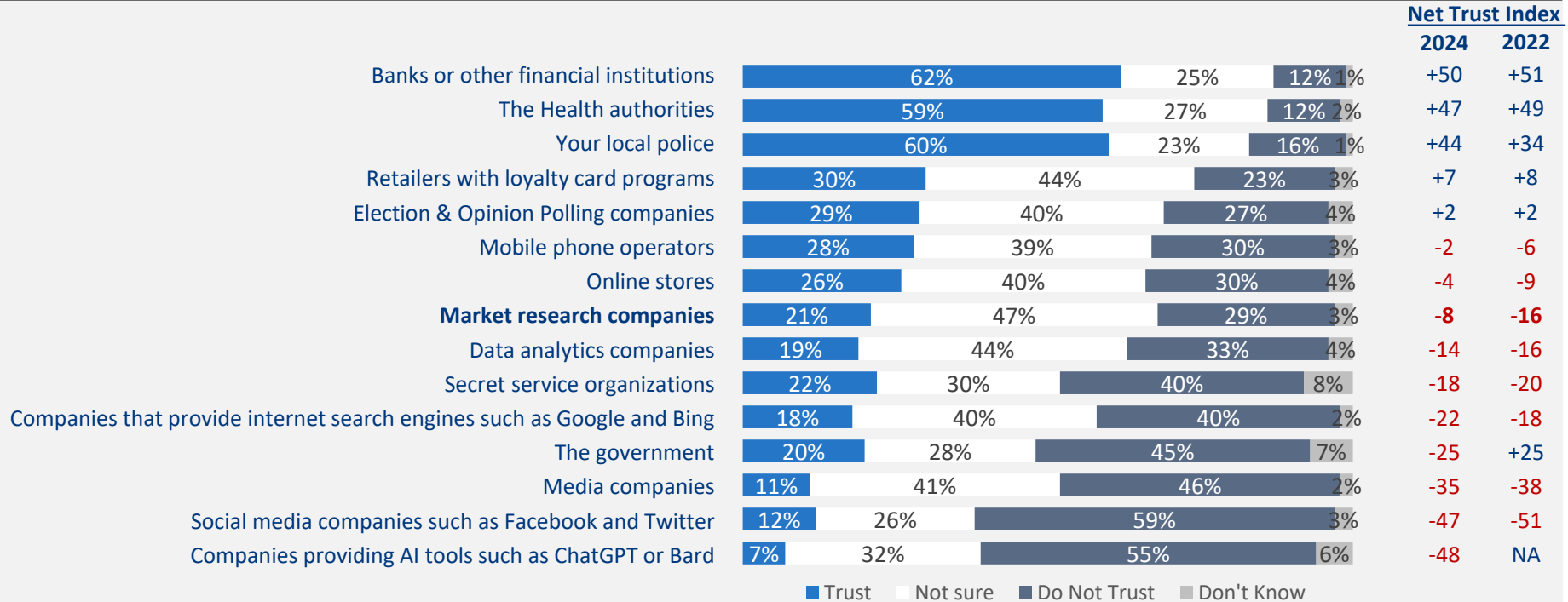


Financial institutions, health authorities and law enforcement still hold the public's highest trust in safeguarding personal data in Canada. Market research companies rank in the middle, while media companies, social media platforms and AI providers face the most distrust.



Canada

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



Net Trust Index = % Trust – % Do Not Trust

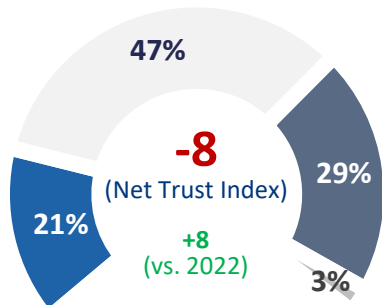


While net trust in market research and data analytics companies regarding protection and use of personal data in Canada is still negative, it's on the rise vs. 2022.

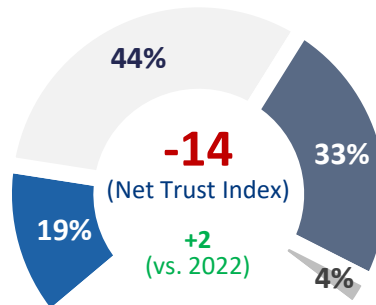


Canada

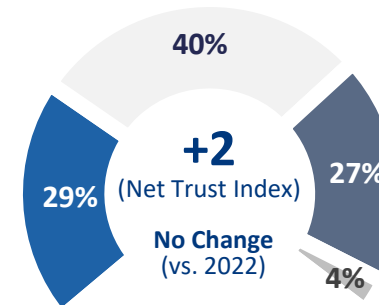
### Trust in Market Research



### Trust in Data Analytics



### Trust in Election & Opinion Polling



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

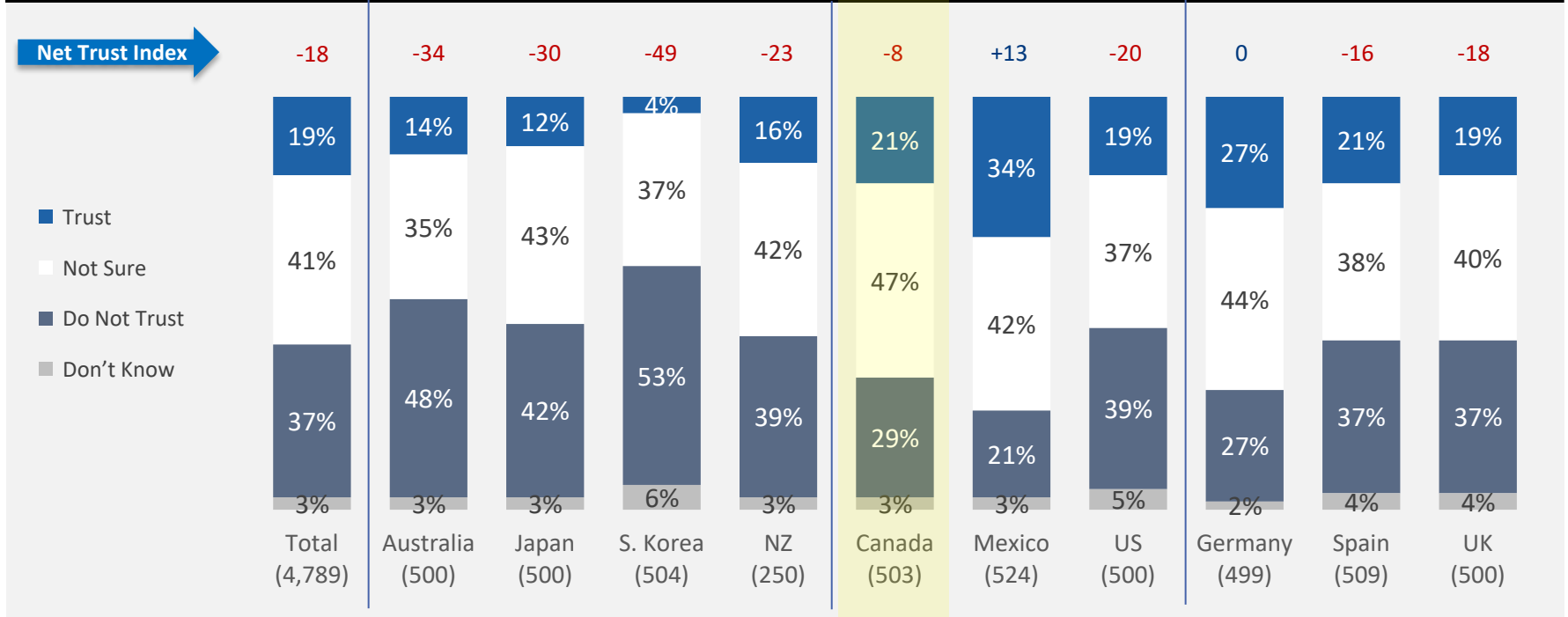
*Net Trust Index = % Trust – % Do Not Trust*



While there's little trust in the ability of market research companies to protect and use personal data responsibly, Canada is higher than the net global average.



### 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 declined in all countries vs. 2022, except in Canada, which exhibited a sizable increase.

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

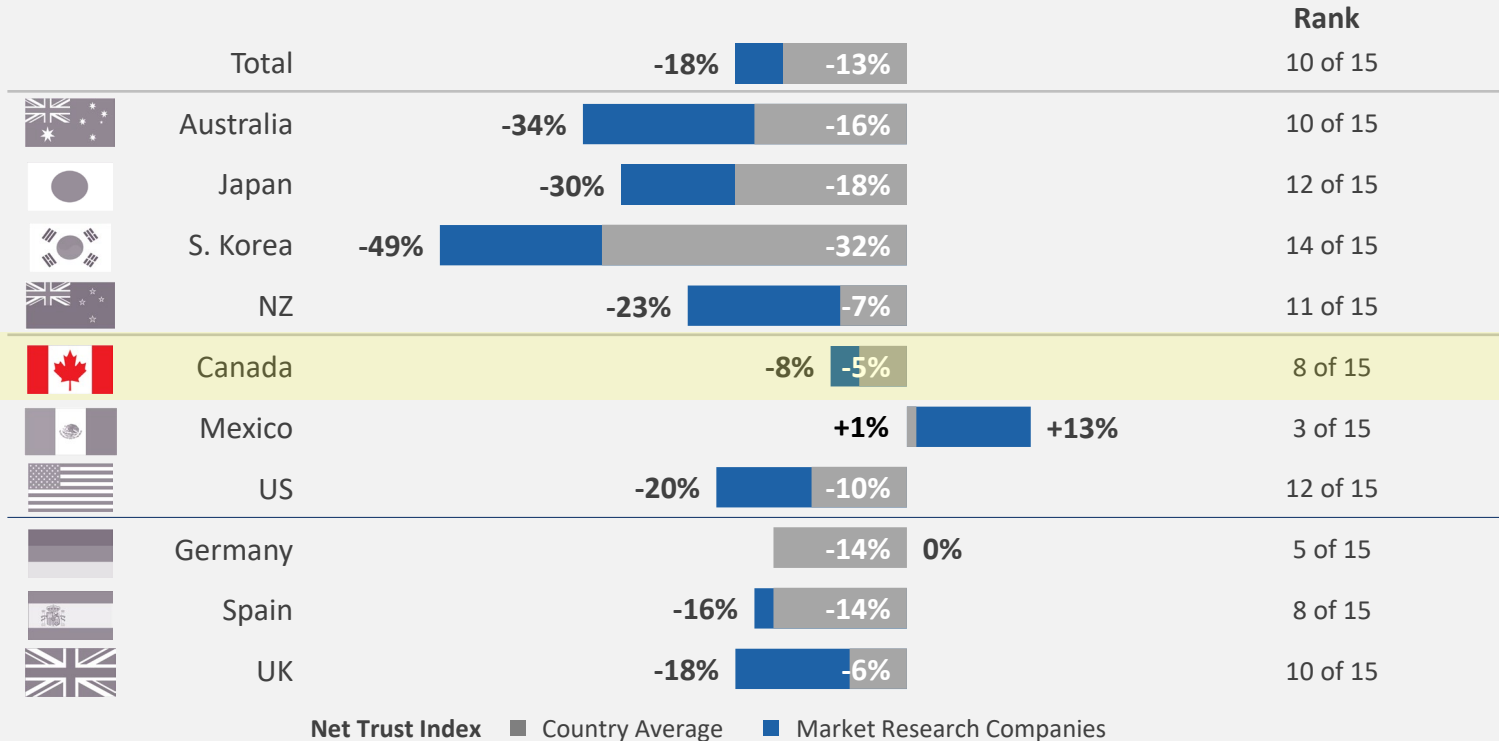
	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
<b>Net Trust Index</b>	2024	-23	-34	-30	-49	-8	-20	--	-18
	vs. 2022	-5	--	-5	-12	+8	-12	-8	-7
<b>% Trust</b>	2024	17%	14%	12%	4%	21%	19%	27%	19%
	vs. 2022	-2%	--	+3%	-3%	+3%	-7%	-3%	-5%
<b>% Do Not Trust</b>	2024	39%	48%	42%	53%	29%	39%	27%	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 middle in Canada but rank slightly lower in most other countries.

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



Net Trust Index = % Trust – % Do Not Trust

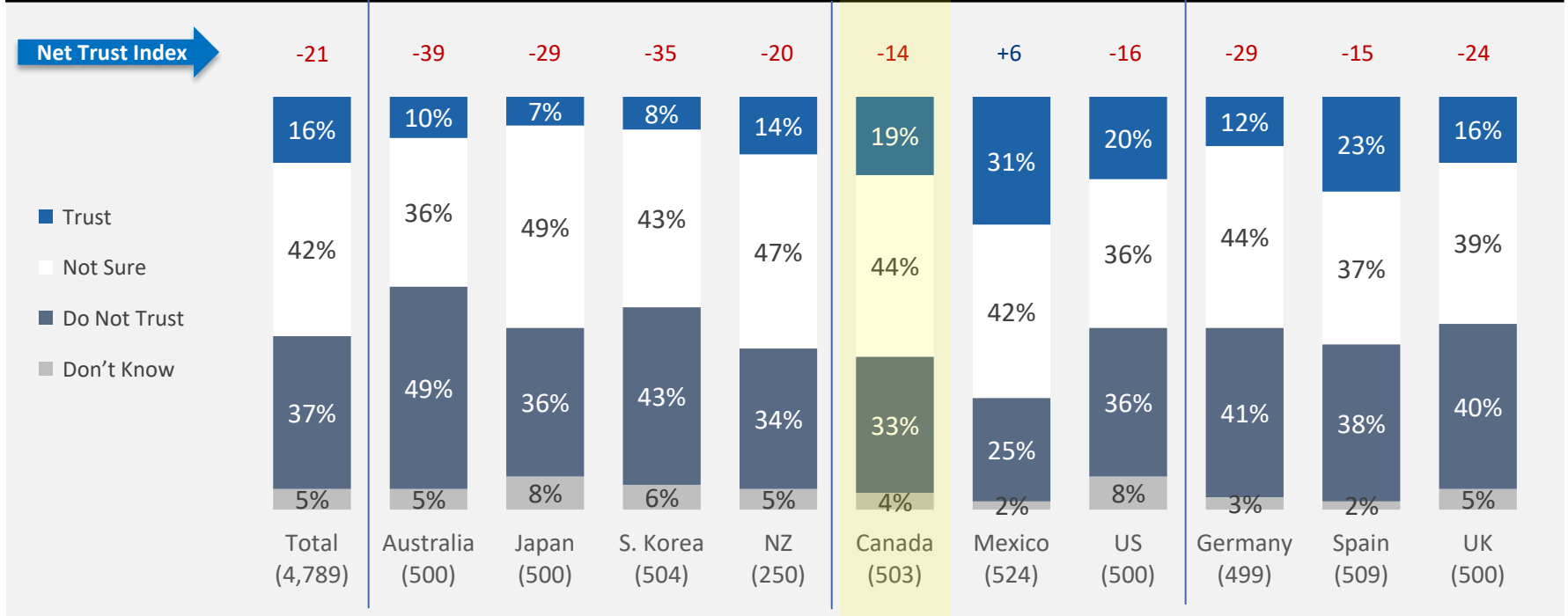




Though there's deep distrust in data analytics companies' perceived handling of personal data worldwide, net trust in Canada is slightly above the global average.



### 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 all countries except Canada.

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

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

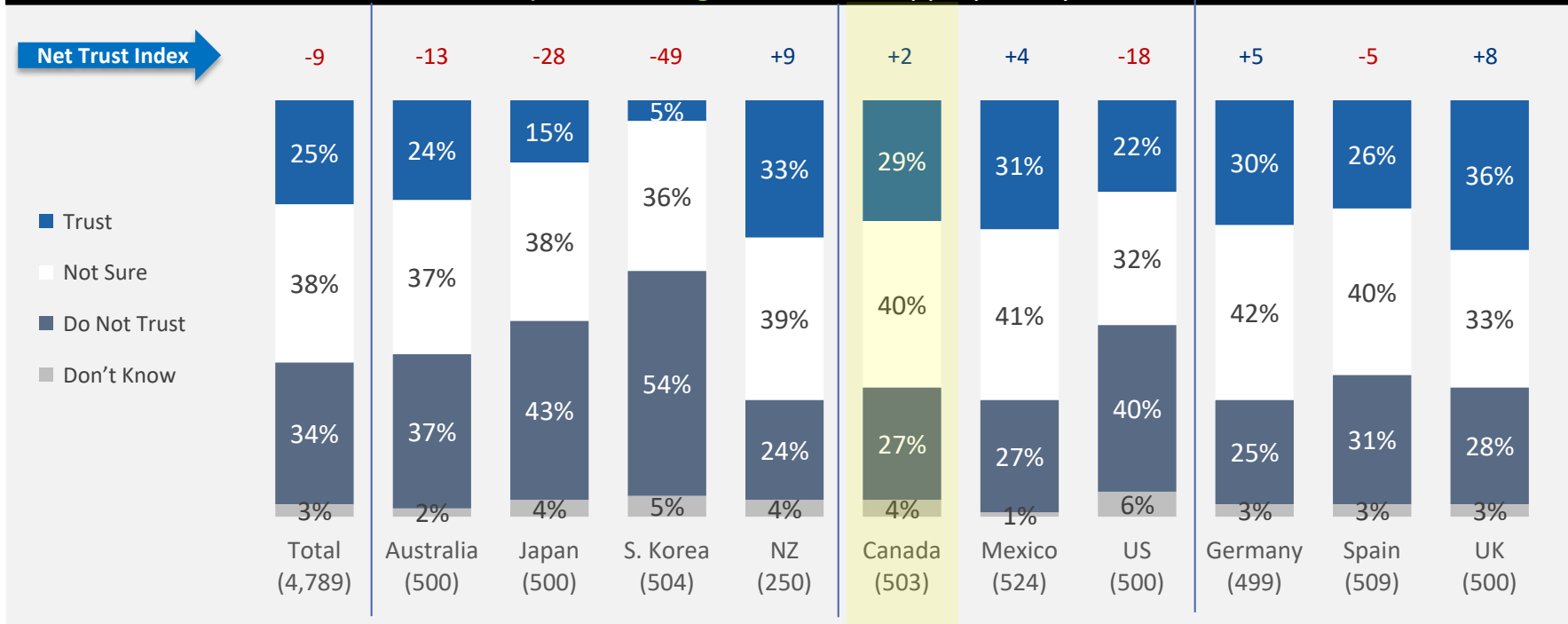
Net Trust Index = % Trust – % Do Not Trust  
\*Total based on comparable countries across waves.



Trust in polling companies' data handling varies widely – South Korea and Japan are most skeptical, while those in NZ, the UK, Germany, Mexico, and Canada are most trusting.



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










Net Trust Index = % Trust – % Do Not Trust




While trust in election & opinion polling companies' data privacy practices dropped globally, it's positive and stable in Canada vs. 2022.

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

	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK
<b>Net Trust Index</b> →	2024	-13	-13	-28	+2	-18	+5	+8
	vs. 2022	-4	-1	-5	--	+1	-14	-1
<b>% Trust</b> →	2024	23%	24%	15%	29%	22%	30%	36%
	vs. 2022	-1%	-3%	+4%	-2%	-1%	-8%	+3%
<b>% Do Not Trust</b> →	2024	36%	37%	43%	27%	40%	25%	28%
	vs. 2022	+3%	-2%	+9%	-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 is centered over 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 magnifying glass's lens is slightly blurred, creating a sense of depth and focus on the data fields.

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 Canada, with similar proportions finding it both appropriate and inappropriate.



## Appropriate Use of Personal Data by Market Research

**Bottom 2 Box: Inappropriate**

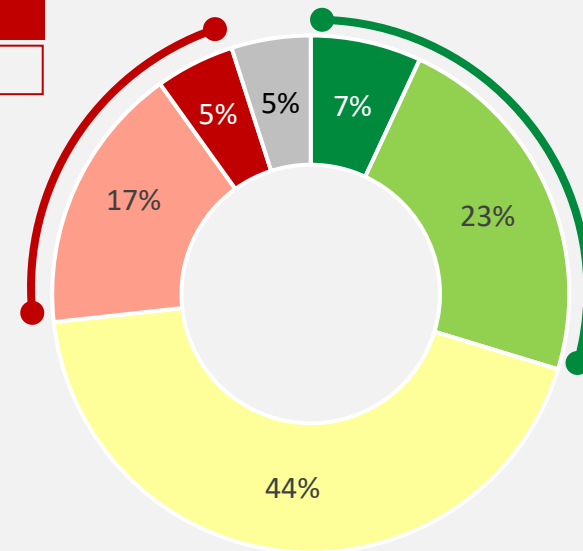
2024: 22%

2022: 22%

**Top 2 Box: Appropriate**

2024: 30%

2022: 30%



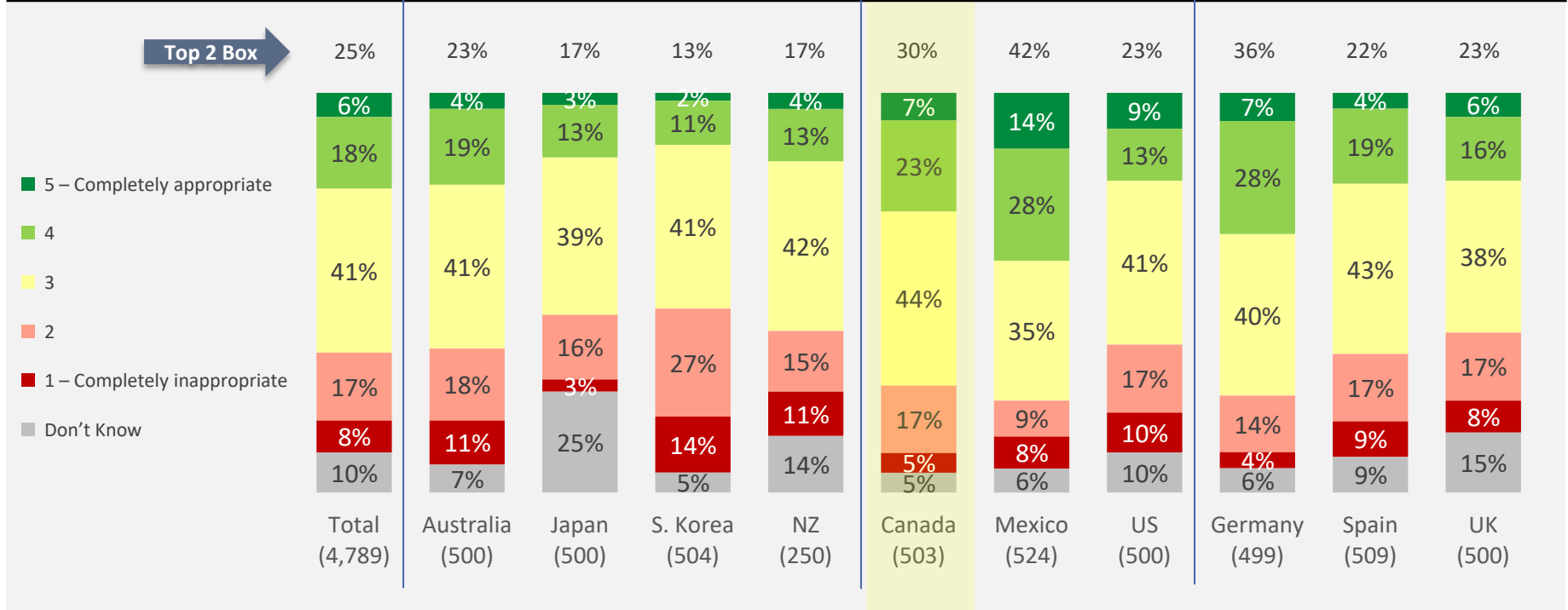
■ 5 - Completely appropriate ■ 4 ■ 3 ■ 2 ■ 1 - Completely inappropriate ■ Don't know



This mixed sentiment is evident across countries – Canada is slightly higher than the global average in this aspect.



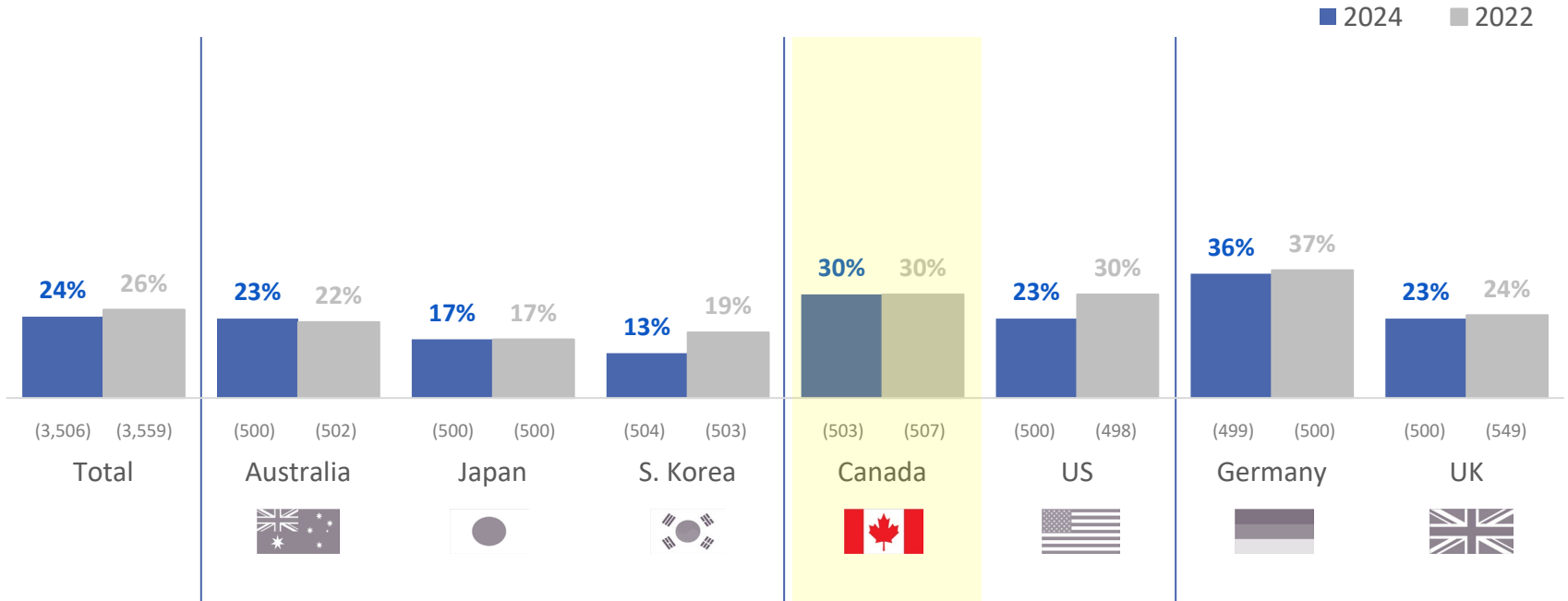
### Appropriate Use of Personal Data by Market Research





In Canada, 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 still face fairly high levels of concern over data protection in Canada.



## Concern that Market Research Securely Protects Personal Data

Bottom 2 Box: Not Concerned

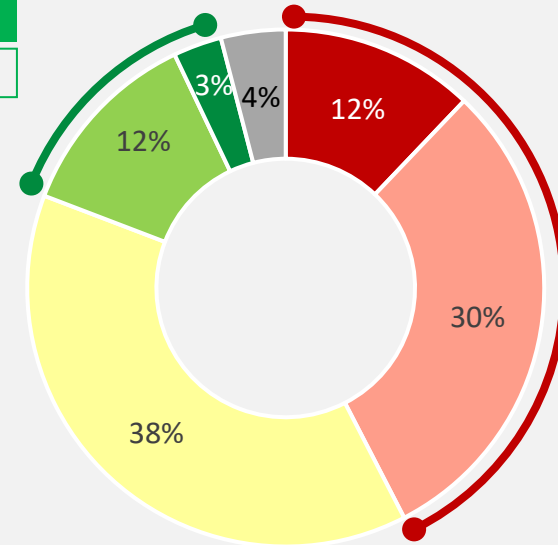
2024: 16%

2022: 14%

Top 2 Box: Concerned

2024: 42%

2022: 46%



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

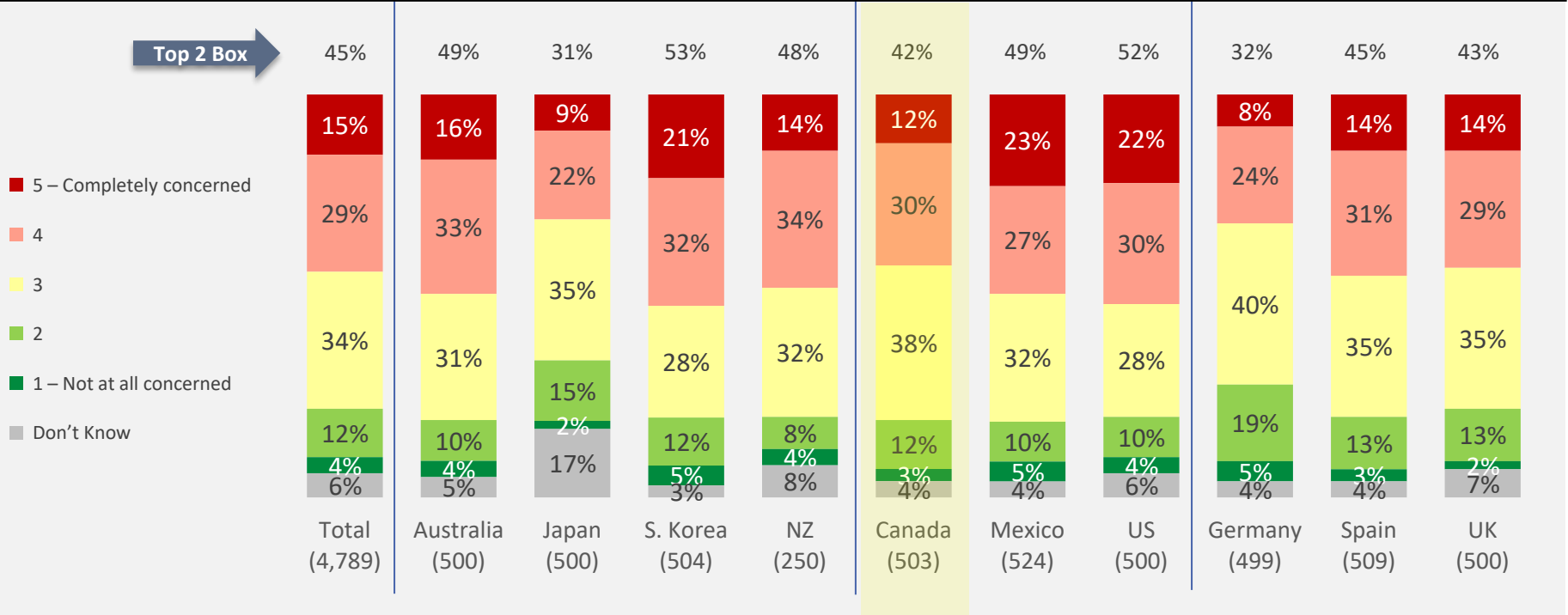


Concern in this regard is comparable to the global average in Canada.



### Concern that Market Research Securely Protects Personal Data

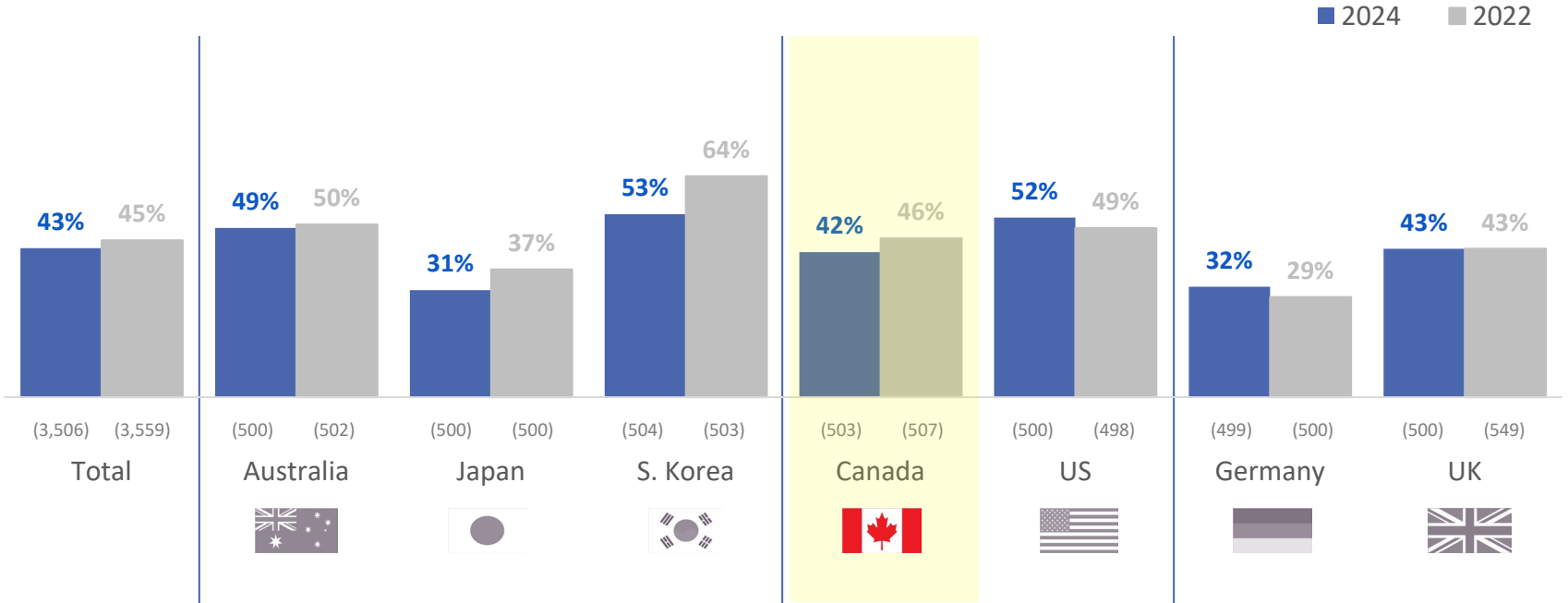
Top 2 Box





Relative to 2022, concern in Canada is fairly stable.

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





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



Canada

### Degree Informed about Personal Data Collection, Storage & Use

Bottom 2 Box: Not Informed

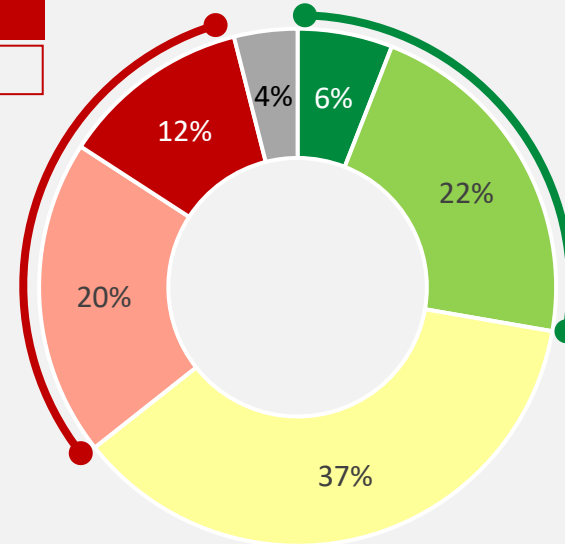
2024: 32%

2022: 32%

Top 2 Box: Informed

2024: 27%

2022: 29%



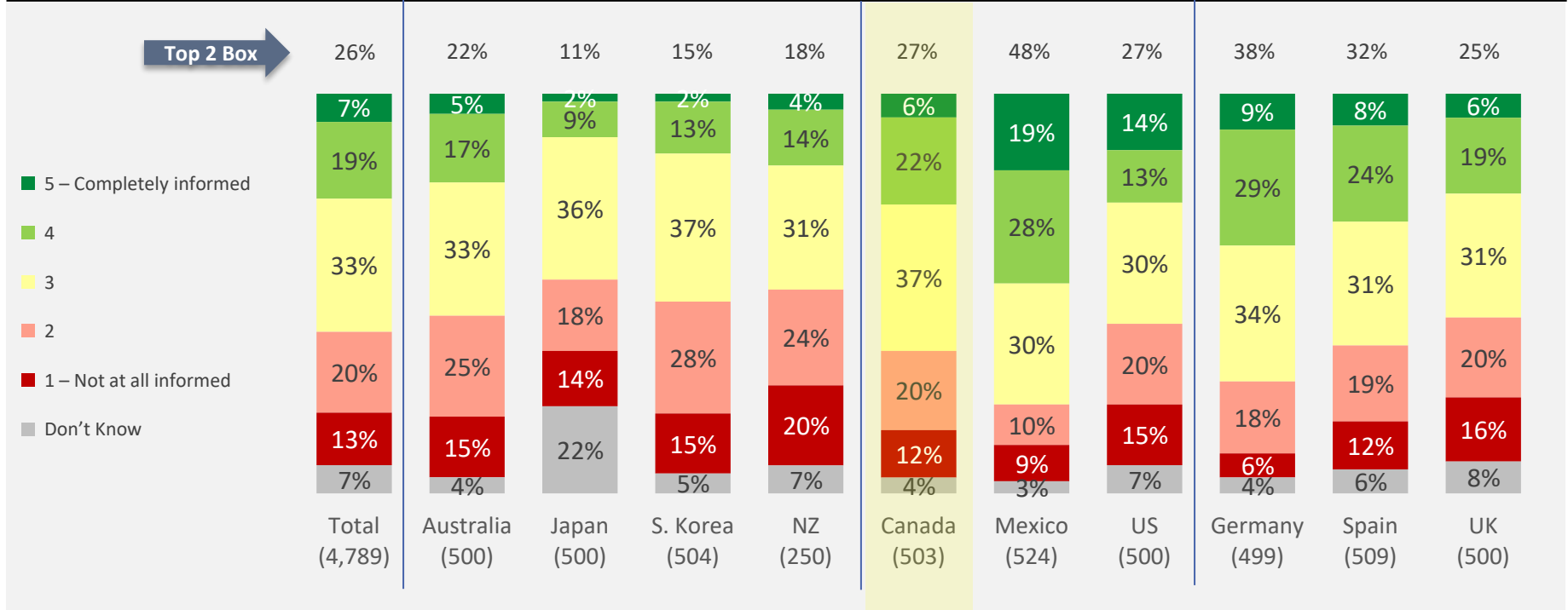
■ 5 - Completely informed ■ 4 ■ 3 ■ 2 ■ 1 - Not at all informed ■ Don't know



In Canada, reactions align with the global average.



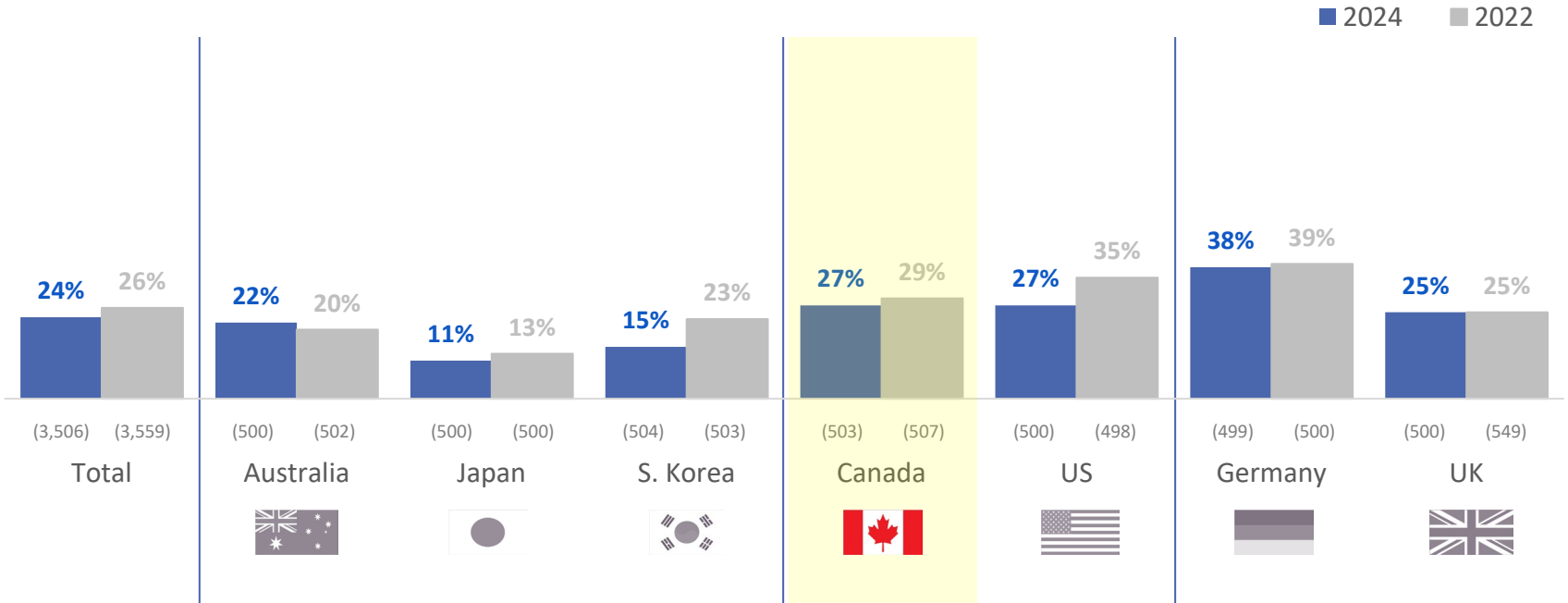
### Degree Informed about Personal Data Collection, Storage & Use



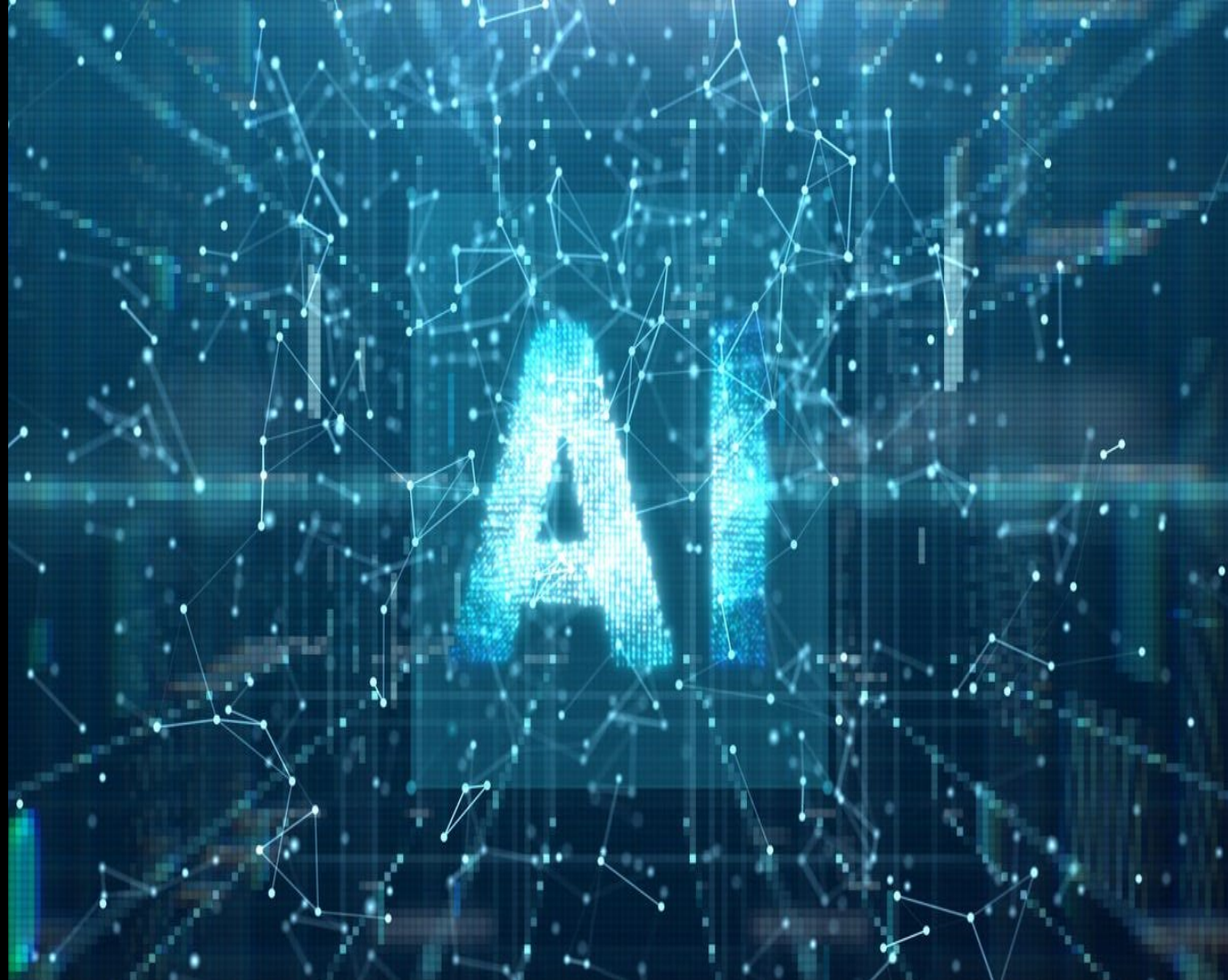


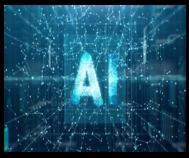
Sentiment is largely similar relative to 2022.

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



**HOW AI  
IMPACTS  
THE LEVEL OF TRUST**





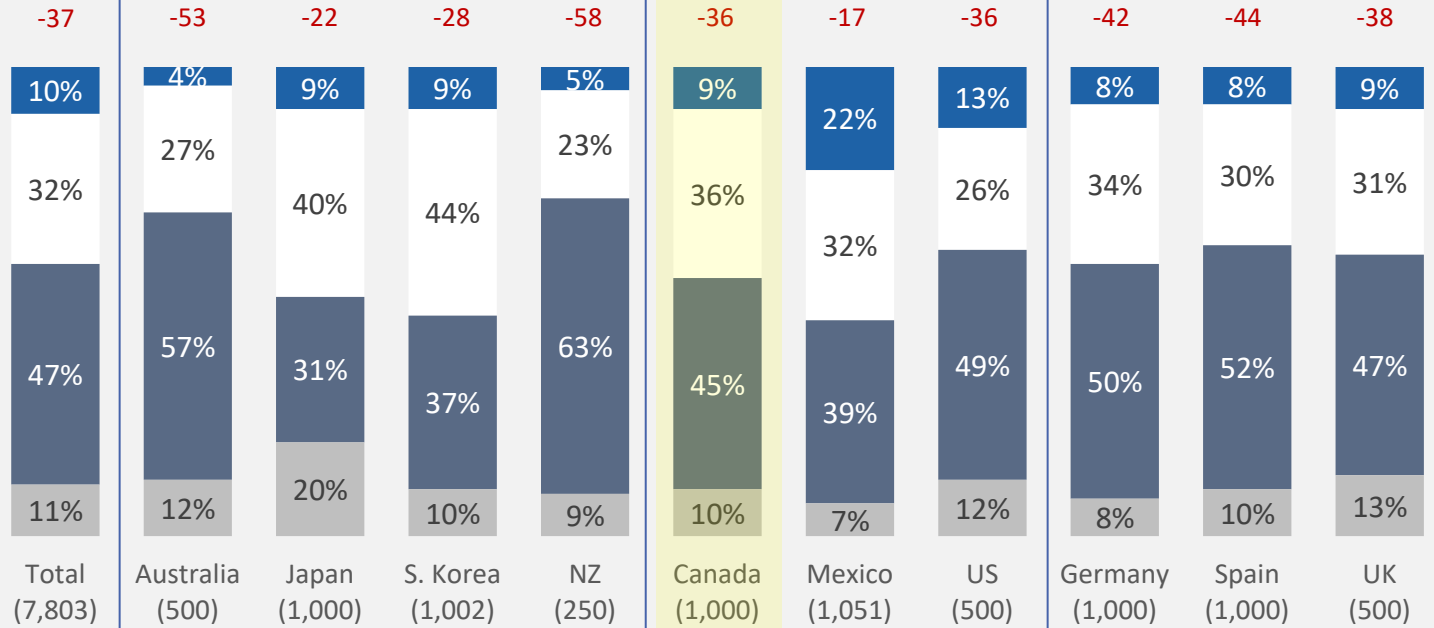
Incorporating AI into market research practices negatively impacts trust in market research companies.



### Average Impact on Trust of Market Research Companies Using AI†

Net Trust Index

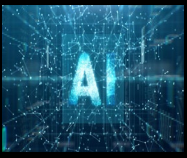
- Increase Trust
- No Impact
- Decrease Trust
- Don't Know



Net Trust Index = % Increase Trust – % Decrease Trust

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



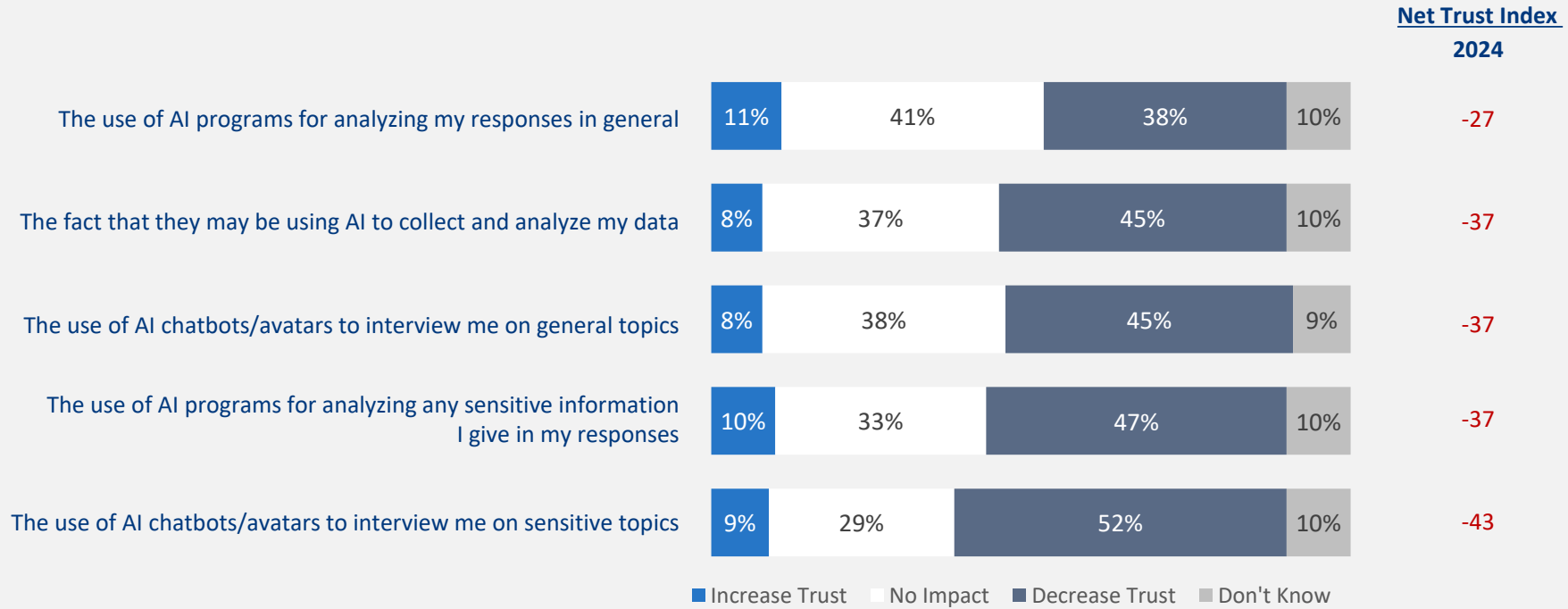


Net trust is negative across all aspects of AI use by market research companies in Canada.



Canada

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



Net Trust Index = % Increase Trust – % Decrease Trust

**TREND DATA  
2024 VS. 2022**



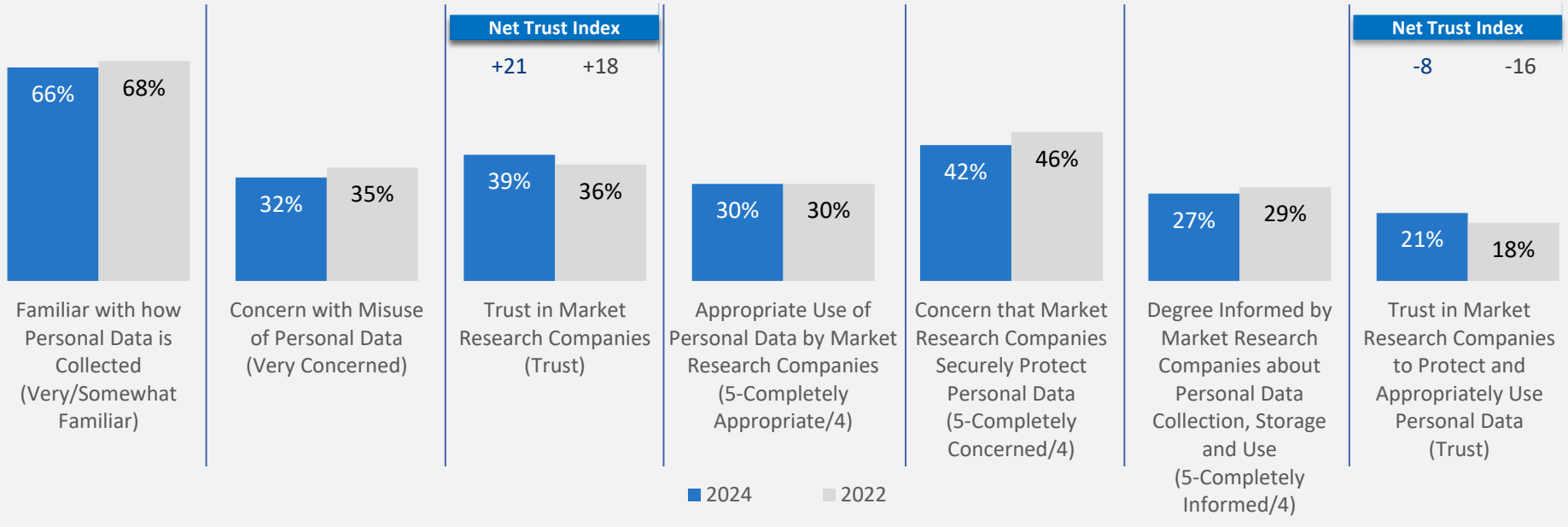


Net trust in market research companies overall is stable vs. 2022. While trust in relation to personal data use is still negative in Canada, it's moving in the right direction.



Canada

## 2024 vs. 2022 Comparison



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

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EXECUTIVE DIRECTOR, GRBN  
[ANDREW.CANNON@GRBN.ORG](mailto:ANDREW.CANNON@GRBN.ORG)

