



**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 Germany

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



Corporate partners

Silver sponsors



Bronze sponsors





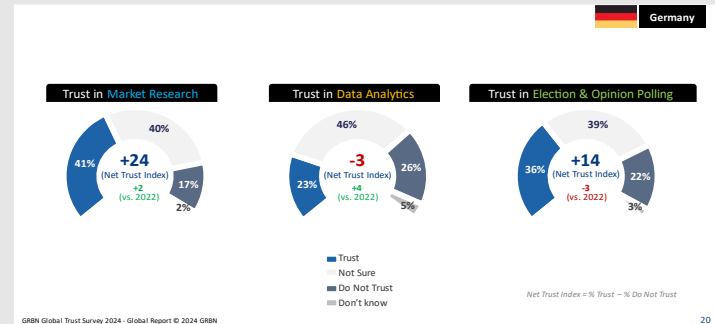
Thought Leadership – By Bettina Klumpe, ADM e. V.

Trust and transparency: Fundamental pillars of the industry

Trust is an essential cornerstone for stable relationships, successful collaboration, social cohesion and personal growth. As a fundamental human quality, it connects and enables us to find orientation in a complex world. In contrast, mistrust can damage relationships, disrupt communication, and reduce the effectiveness of teamwork and productivity. Widespread mistrust of government institutions can endanger the functioning of democracy, leading to political apathy, low voter turnout, and an increasing societal divide. Once trust is lost, a great deal of effort and time is needed to rebuild and sustain it.

The insights industry also relies heavily on public trust. Without trust in the accuracy of the results and the security of participant data, market research becomes difficult to impossible.

In Germany, 41 percent of people have a trust in market research companies, while 40 percent are unsure and 17 percent even distrust them. The Net Trust Index (NTI) is at 24, which means a slight increase of 2 index points compared to 2022. Overall, Germany is above the total average of the participating countries (NTI 12). Among the 15 examined company categories, market research in Germany ranks 4th in terms of trust. In comparison, the numbers seem positive. However, the coin has two sides: almost one in two people do not have complete trust in market research companies. And if you look at the numbers for trust in election research companies and data analysts, the figures are even lower.

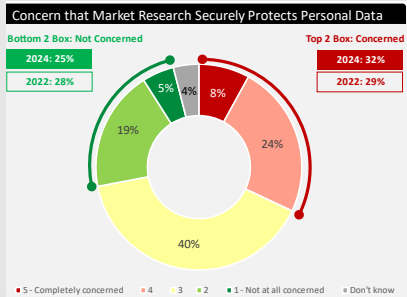




Thought Leadership – By Bettina Klumpe, ADM e. V.

What unsettles people? A potential reason can be found in the mistrust of the use of personal data by market research companies. Only 27 percent of the population have trust in market research companies in terms of protection and appropriateness of the use of personal data, 44 percent are unsure and 27 percent do not trust. This puts the NTI at 0, compared with +9 in 2022. Election research companies (NTI: 2024 +5, 2022 +18) and data analysts (NTI: 2024 -29, 2022 -19) also performed worse.

When asked whether they have concerns about the secure protection of personal data through market research, almost a third now respond with "yes".



Trust requires clarity and transparency. In the market research industry in Germany, clear rules and guidelines ensure both. These include guidelines that guarantee the anonymity of respondents and ensure that the data collected is not passed on for advertising or direct marketing purposes. In cases of doubt, the "Rat der Deutschen Markt- und Sozialforschung" examines compliance with the regulations. All these regulations are trust-building. We all have to adhere to them. AI will certainly play an increasing role in the industry. This makes rules and transparency even more important, especially as the public is very skeptical about the use of AI in market research

Bettina Klumpe

ADM e. V., Germany





Thought Leadership – By DR. Otto Hellwig, BILENDI

Trust in market research - a German perspective

The 2022 version of the "Global Trust Survey" has been recognised in the German research community. The tenor was ambivalent. On the one hand, Germany ranks fourth internationally in terms of trust in market research. On the other hand, trust in us market researchers is rather average compared to other professional groups. For example, we market researchers only achieve tenth place worldwide in the ranking of professional groups surveyed for our handling of personal data, far behind bankers and politicians. Nevertheless, Germany is in 5th place in the national comparison.

However, it would be deceptive to believe that we in Germany should rest on our laurels. A recently published study by a public broadcaster on Germans' trust in their institutions shows that Germans are continuing to lose their trust. The reasons for this are complex. One possible cause is the growing economic pessimism among the population. In times of increasing crises and uncertainty, people are losing trust in institutions such as the economy, politics and the media. Market research will also be affected by this.

So how should we market researchers take the initiative to remain trustworthy in the future and what have we already initiated in Germany in particular to strengthen trust in market research? Market research is not only dependent on the trust of the population. The trust of its clients and study participants is also important for its work and its success. The "Global Trust Survey" is an instrument for measuring the public's trust in our actions. Other studies should complement this compass. Bilendi & respondi therefore regularly asks its own study participants about their experiences in the studies and their satisfaction as participants. This picture should also be supplemented by constant feedback from our clients.

Trust is gained by strengthening the foundations of market research and communicating this well. Scientific standards, data protection and the separation of research and non-research activities are the guard rails that should guide our journey. However, these cornerstones are not static, they evolve and must therefore be continuously reviewed and adjusted. In line with the definition, compliance with these foundations must be ensured.



Thought Leadership – By DR. Otto Hellwig, BILENDI

In Germany, the market research associations have recently fundamentally revised their quality assurance standards in order to adapt them to a changed research landscape. Compliance with these standards is monitored by a strict system of self-regulation, headed by the German Market and Social Research Council. However, trust is only created when this constellation of standards and self-regulation is communicated to the population. In Germany, the associations have launched an initiative with this aim, which regularly communicates the aims and methods of market research through various channels. Bilendi & respondi not only supports this initiative financially. The best way to strengthen the trust of the people who take part in our studies is to focus on their research experience and try to optimise it. This is a challenge that requires all players within the industry to take action.

Trust is not a given and can be influenced by the industry. The "Global Trust Survey" is the right feedback and a good compass for this challenge. For this reason, it will continue to be supported by Bilendi & respondi.

DR. Otto Hellwig

BILENDI




Bilendi
& respondi



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 above average in Germany relative to other types of organizations.
- ✓ The value market research brings to businesses is recognized, but there's opportunity to boost perceptions as it relates to individuals.
- ✓ While survey length is still a concern, Germans once again claim to have the most experiences.
- ✓ There continues to be widespread distrust in how industries, including market research, handle personal data.
- ✓ German consumers are highly skeptical of all aspects of AI use in market research.





Key Changes 2024 vs. 2022

- ✓ Globally, public trust in organizations declined slightly.
 - Trust in **market research companies** held relatively steady.
 - While negative perceptions of **data analytics companies** persist worldwide, Germany rebounded slightly vs. 2022.
 - Once again, trust in **election & polling companies** is a net negative globally but positive in Germany.

- ✓ Across all countries, consumers perceived a greater personal benefit from market research.
 - Positive perceived benefits to consumers remained largely consistent, though Japan and Germany enjoyed marked improvements.

- ✓ There's universal erosion of trust in how organizations handle personal data, with Germany exhibiting the steepest decline.
 - 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**



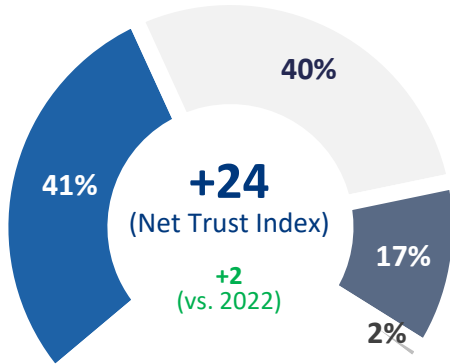


Public trust in market research companies remains positive in Germany, but data privacy practices are a growing concern compared to 2022.



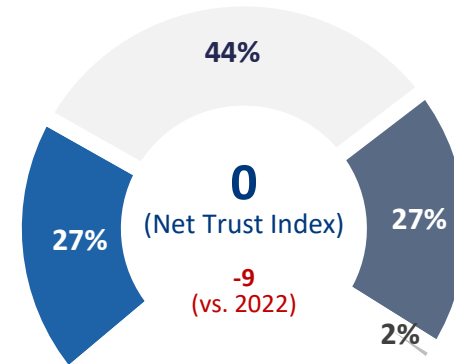
Germany

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 +6 (Market Research companies ranked 4th of 15)

Personal Data Trust Net Trust Index (NTI): Across the 15 industries/organizations analyzed, the average NTI was -14 (Market Research companies ranked 5th of 15)

Base: Version 1 Respondents (499)

Base: Version 2 Respondents (501)

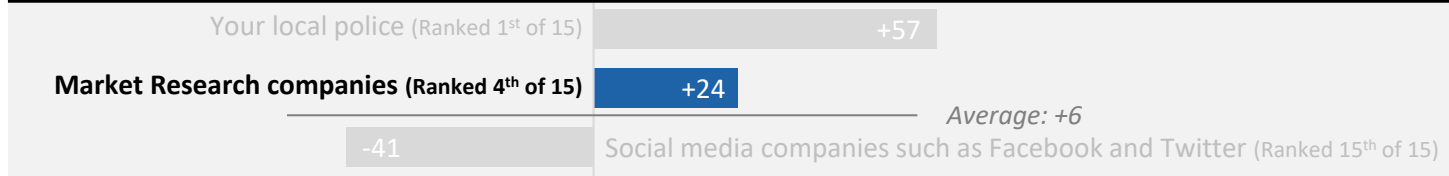


Compared to other surveyed organizations, market research companies rank among the most trustworthy overall and in terms of perceived use of personal data.

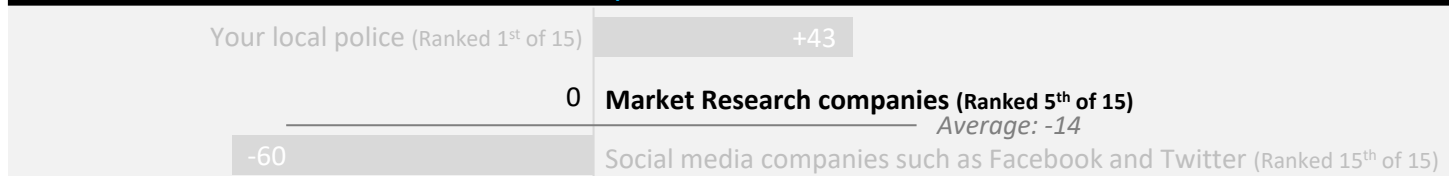


Germany

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



Relative to 2022, consumers see more personal value in market research and while data privacy concerns still exist, levels are relatively stable.



Germany

36%

(-1% vs. 2022)

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

32%

(+3% vs. 2022)

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

38%

(-1% vs. 2022)

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

59%

(+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 (499)

Base: Version 2 Respondents (501)

**LEVEL OF
OVERALL TRUST**

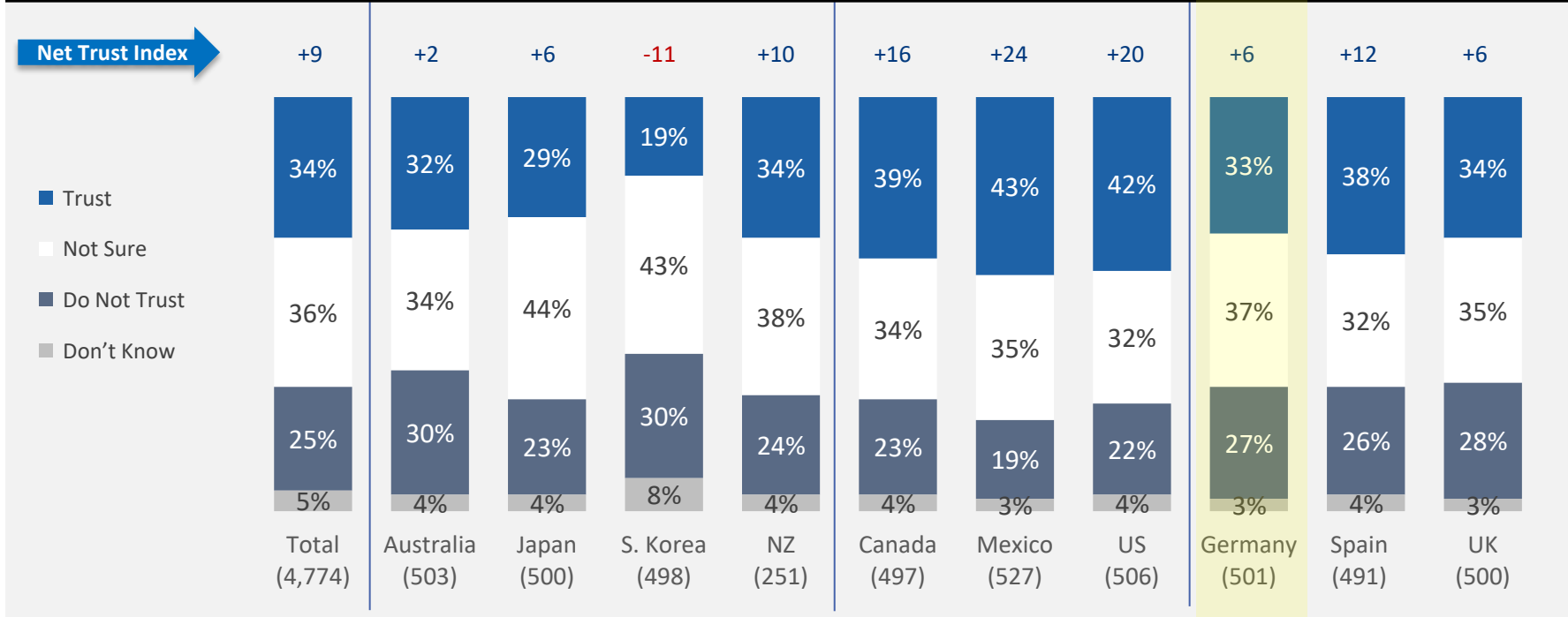




While there's a foundational level of trust in organizations/professionals around the world, most countries also exhibit a sizeable level of distrust. In this respect, Germany is right around the global average.



Average Level of Trust Across Organizations/Professionals†










Net Trust Index = % Trust – % Do Not Trust

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



Net trust in organizations is still positive in Germany.

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



Law enforcement, health authorities, retailers and market research companies remain the most trustworthy in Germany, whereas the government, companies providing AI tools and social media incur the most doubt.



Level of Trust by Organizations/Professionals



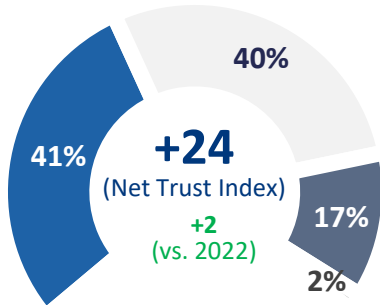
Net Trust Index = % Trust – % Do Not Trust



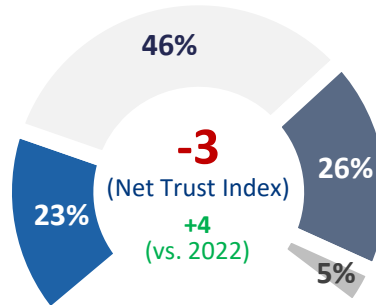
Market research companies continue to command the most trust across the “insights space.”



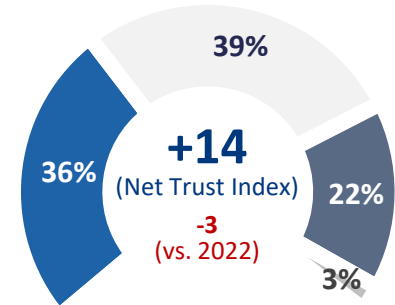
Trust in Market Research



Trust in Data Analytics



Trust in Election & Opinion Polling



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

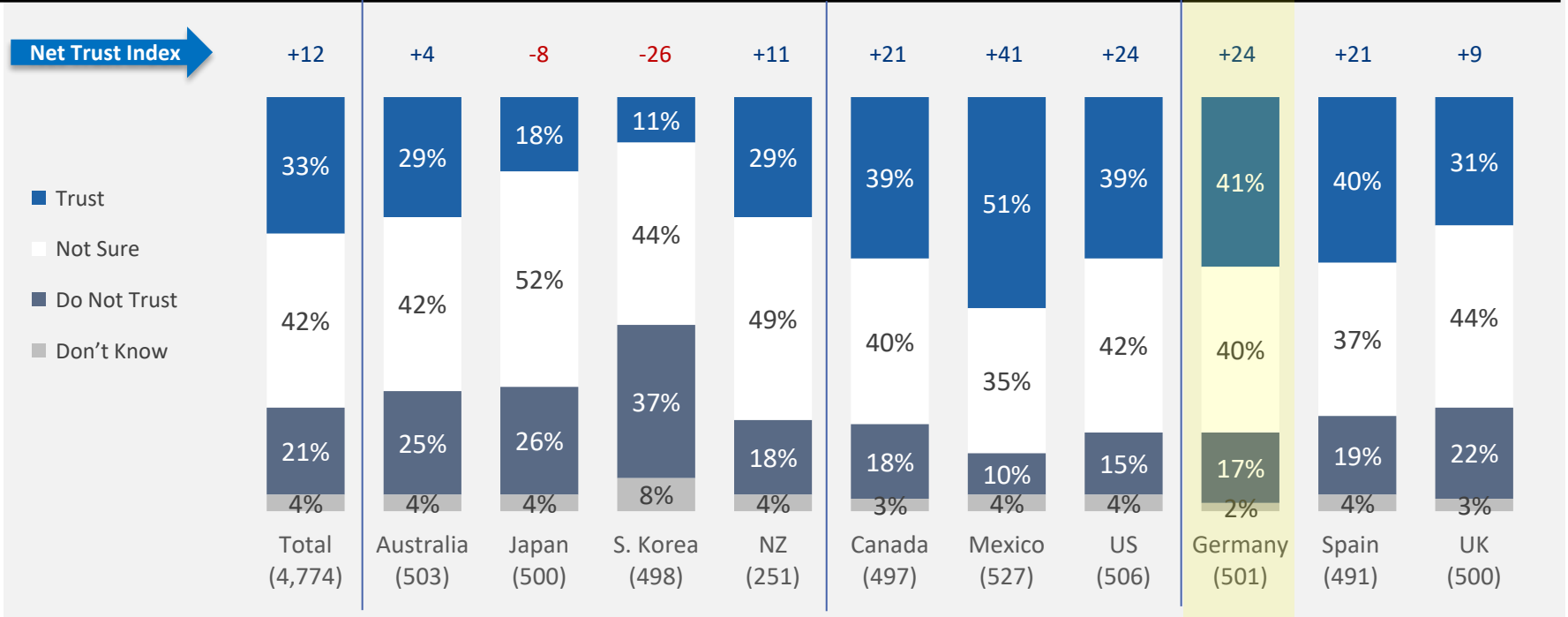
Net Trust Index = % Trust – % Do Not Trust



Trust in market research companies varies greatly by country but leans positive overall. Relative to the global average, Germans are more trusting of market research companies.



Trust in Market Research










Net Trust Index = % Trust – % Do Not Trust



Trust in market research remains strong and stable in Germany vs. 2022.

Trust in Market Research - Trended to 2022

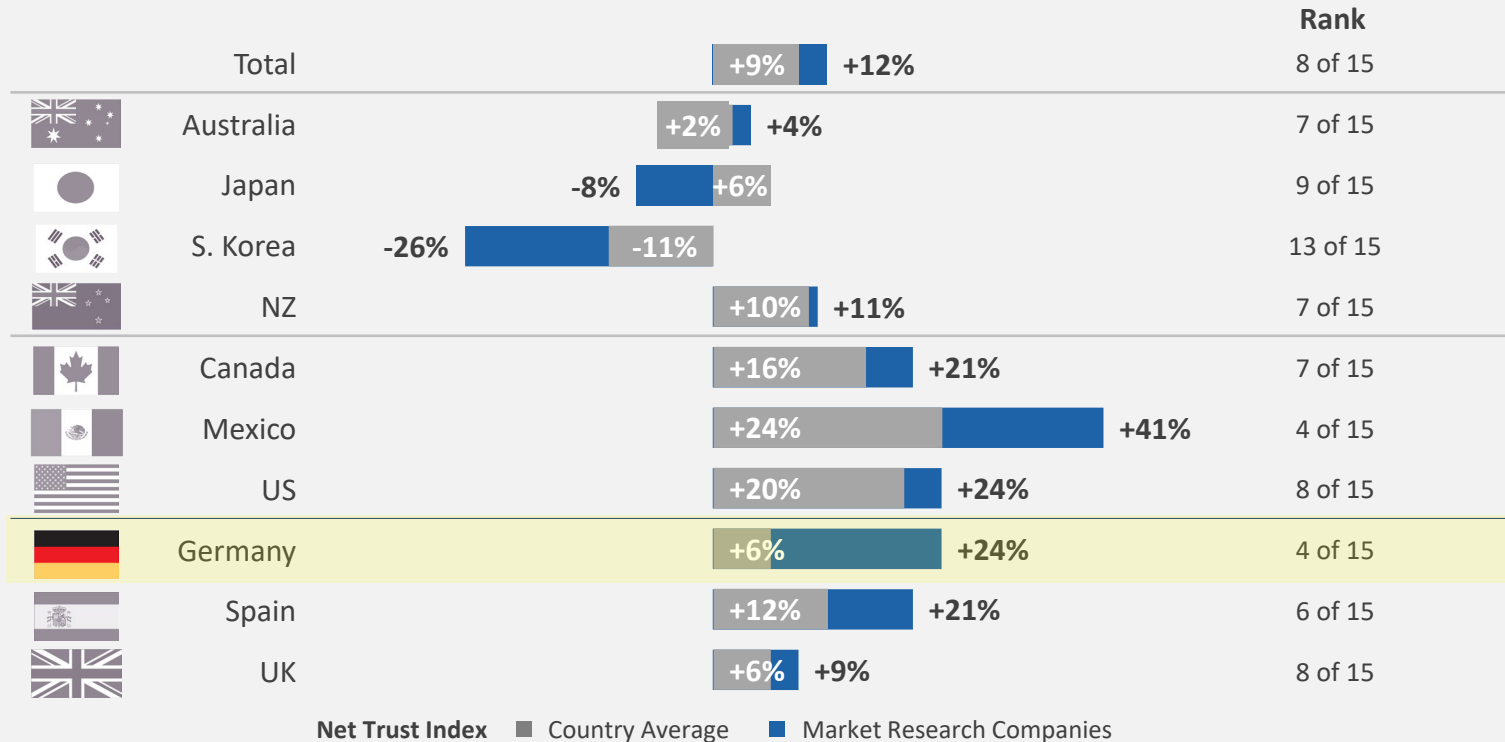
	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index →	2024	+7	+4	-8	+21	+24	+24	+9	
	vs. 2022	--	-3	+5	-14	+3	+2	+1	
% Trust →	2024	30%	29%	18%	11%	39%	39%	41%	31%
	vs. 2022	+1%	--	+3%	-2%	+3%	+2%	+5%	-2%
% Do Not Trust →	2024	23%	25%	26%	37%	18%	15%	17%	22%
	vs. 2022	+2%	+4%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

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



Though trust in market research typically ranks in the middle of the pack globally, it's above average in Germany.

Trust in Market Research (vs. Country Average)



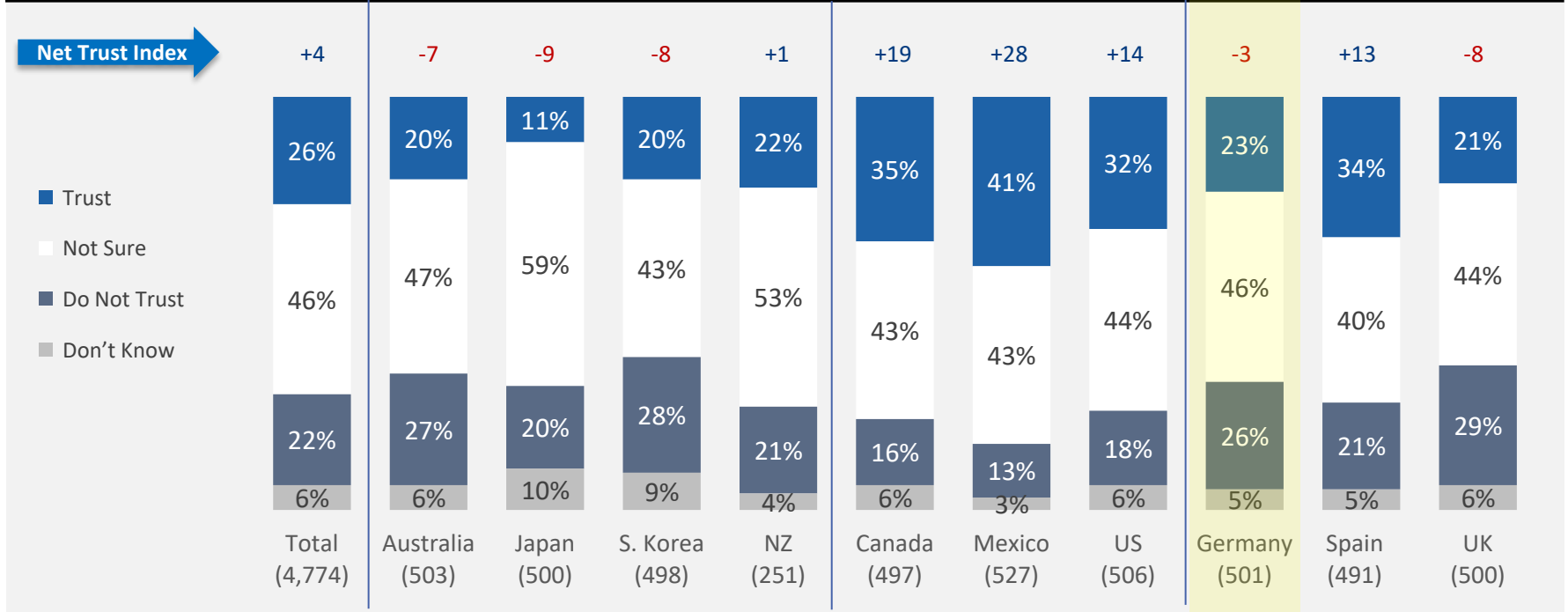
Net Trust Index = % Trust – % Do Not Trust



Germans are largely indifferent towards data analytics companies but are negative on a net basis.



Trust in Data Analytics










Net Trust Index = % Trust – % Do Not Trust



While net trust in this regard is still negative, Germany rebounded slightly 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%	--

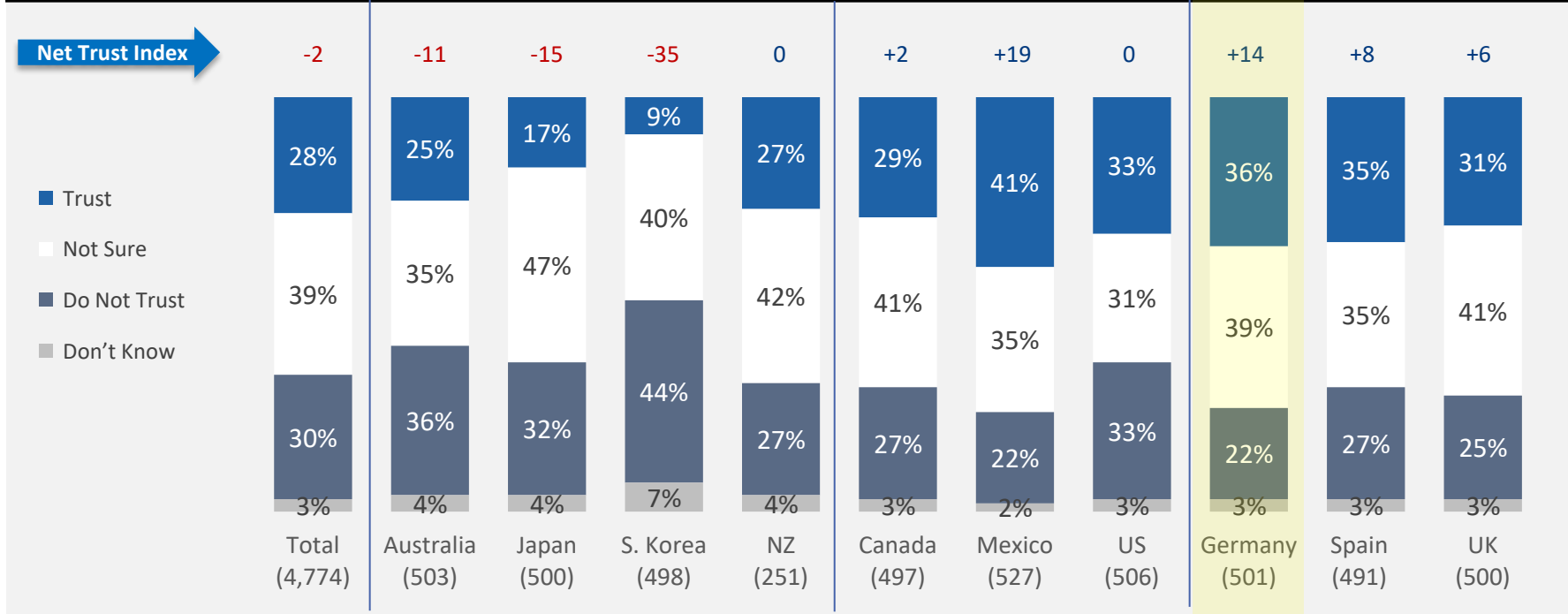
Net Trust Index = % Trust – % Do Not Trust
*Total based on comparable countries across waves.



On a net basis, trust in election and polling is strong in Germany.



Trust in Election & Opinion Polling










Net Trust Index = % Trust – % Do Not Trust



Trust in election and polling remains positive in Germany and is stable vs. 2022.

Trust in Election & Opinion Polling - Trended to 2022

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

Net Trust Index = % Trust – % Do Not Trust

**Total based on comparable countries across waves.*

**BELIEVABILITY THAT
MARKET RESEARCH
IS BENEFICIAL**





In Germany, the value of market research is still more apparent for businesses than for individuals, though the perceived benefit slightly increased for the latter.

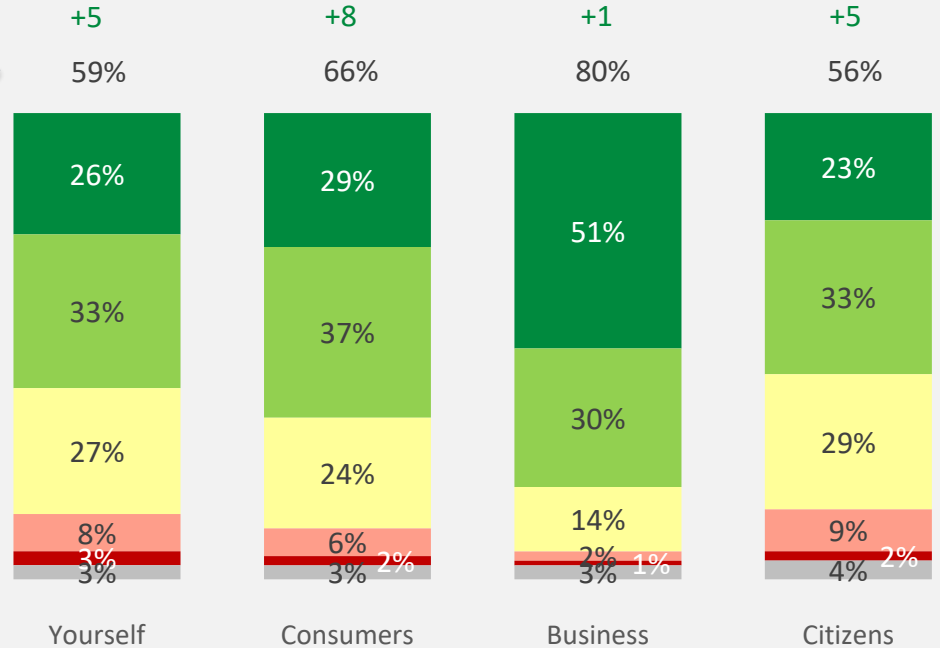


Extent Market Research is Perceived to be Beneficial

Vs. 2022
Top 2 Box



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

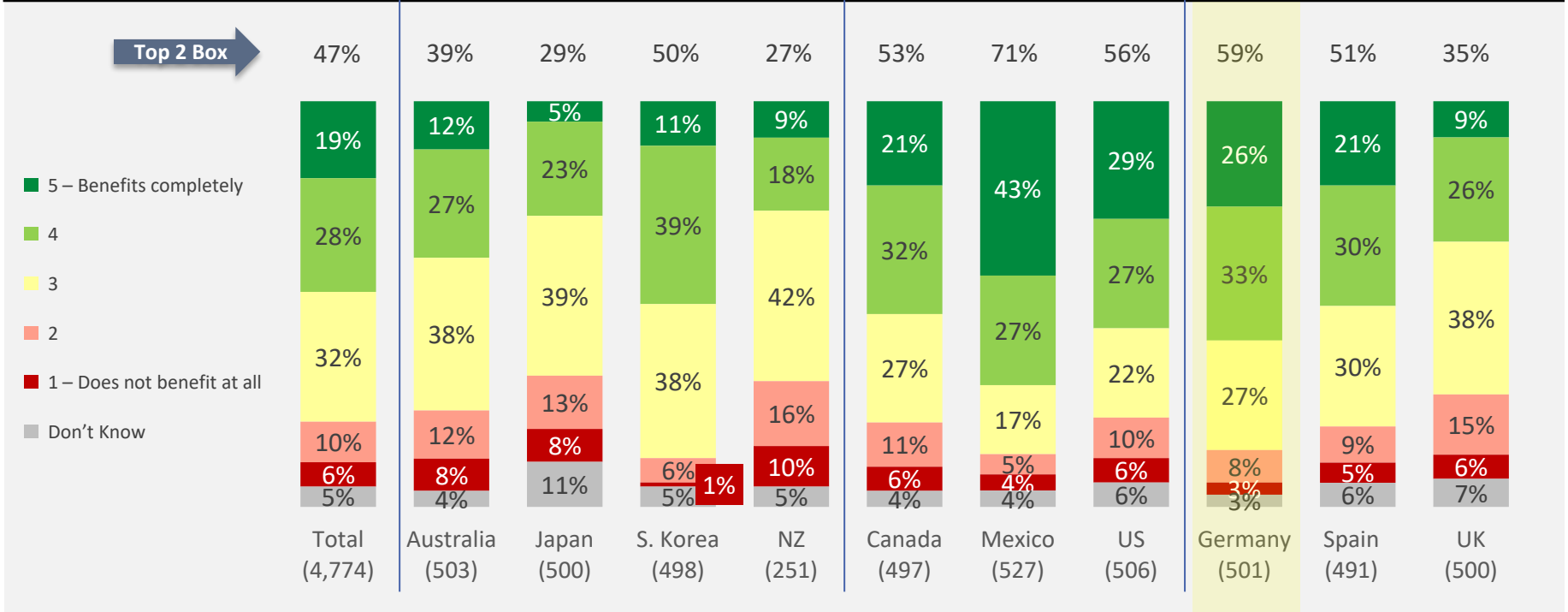




More than half of Germans feel that market research benefits them.



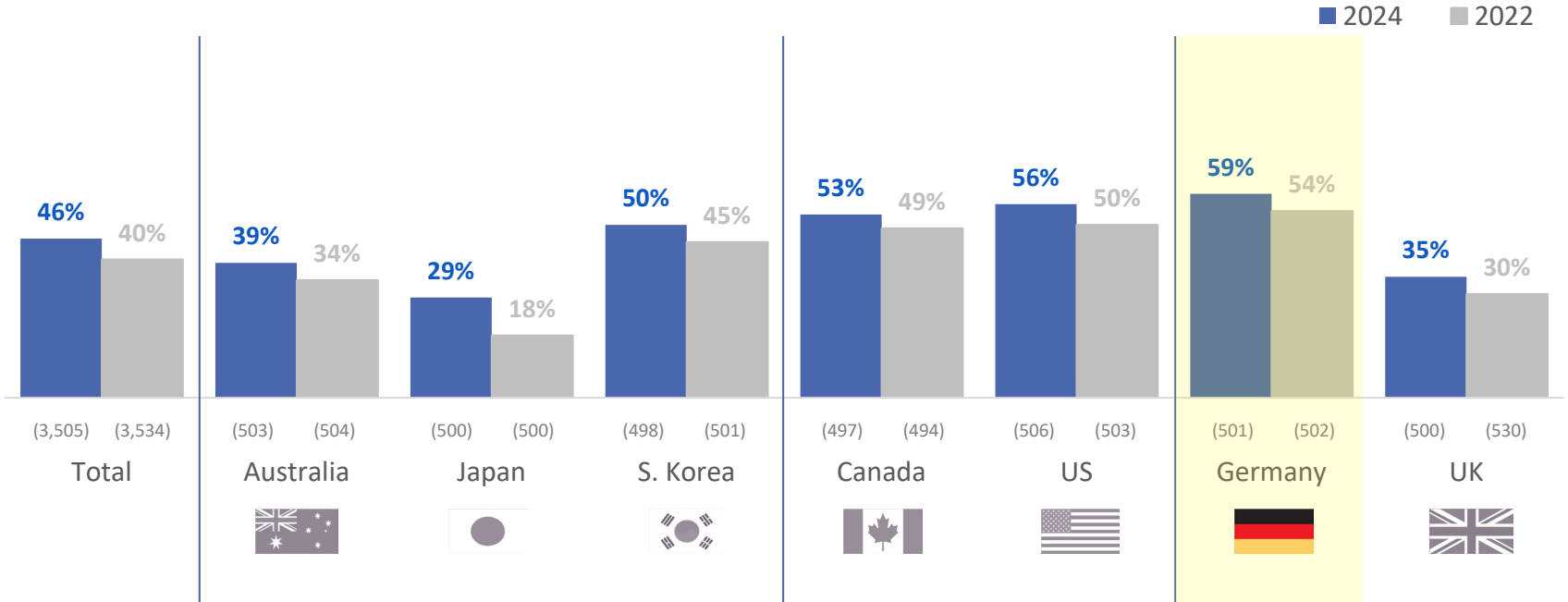
Extent Market Research is Perceived to be Beneficial to Yourself





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

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

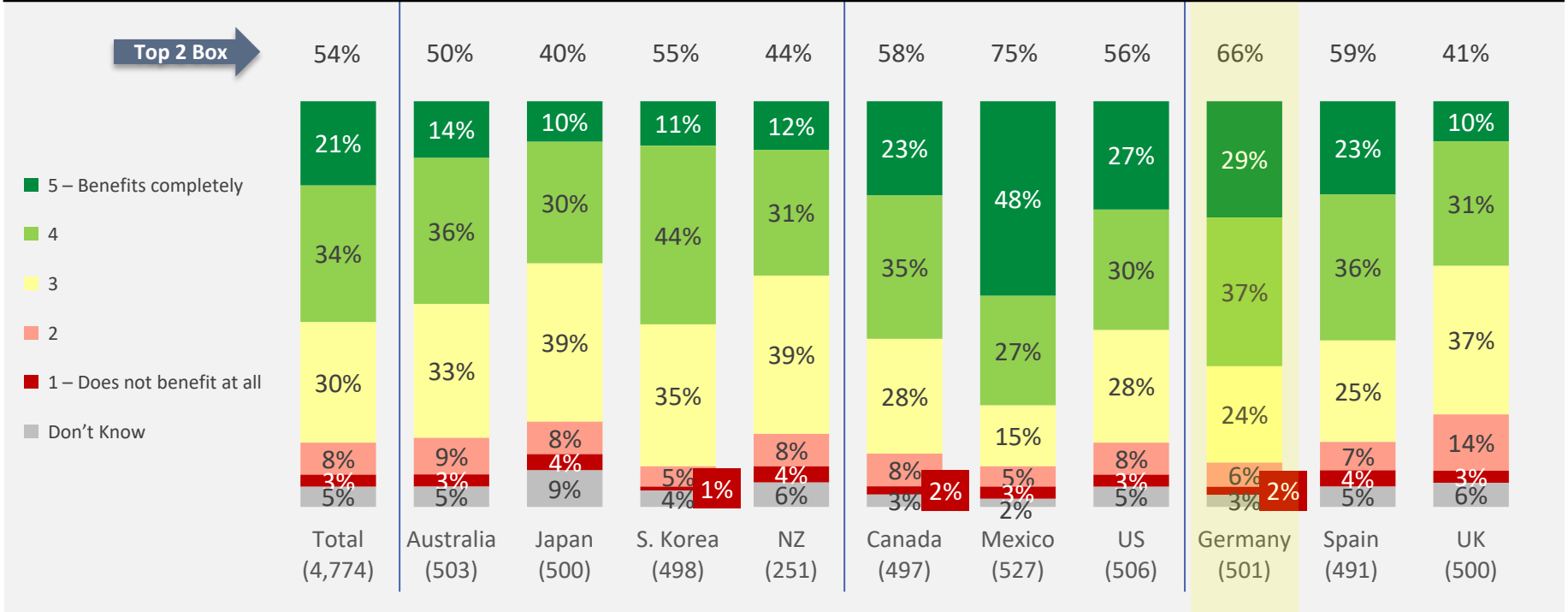




Most Germans recognize some benefit of market research to consumers.



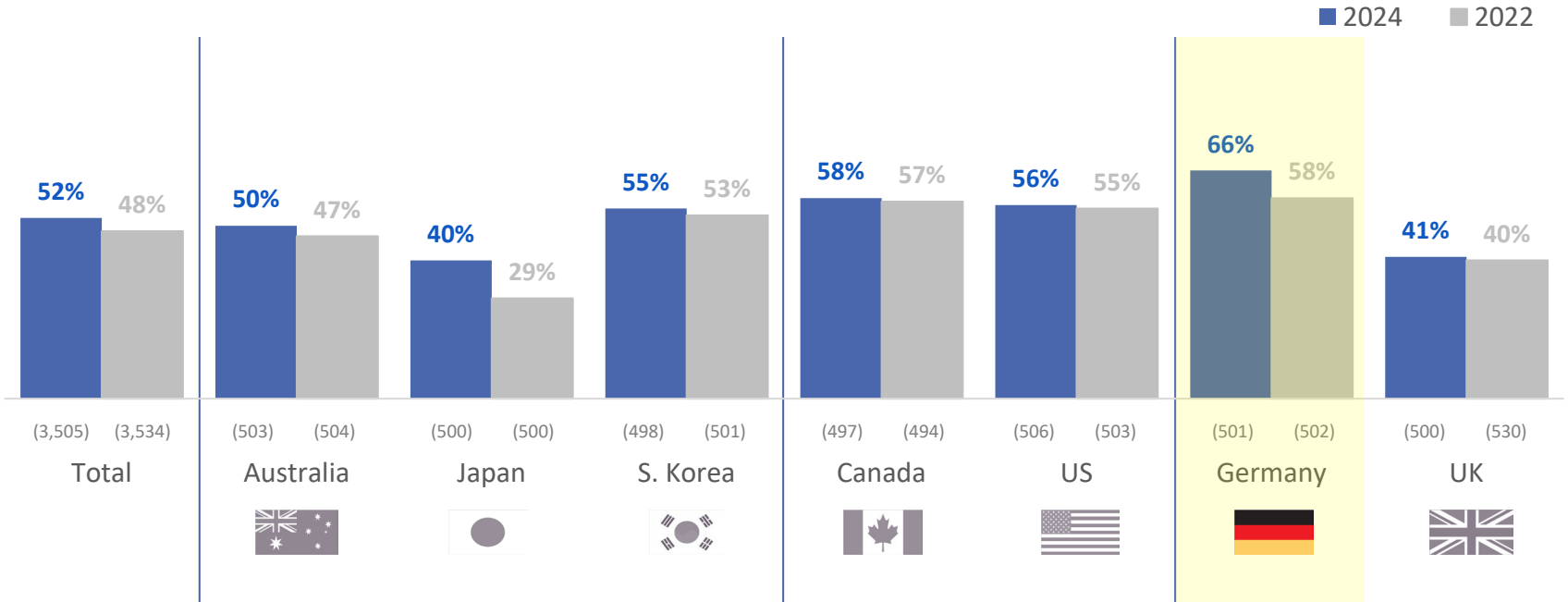
Extent Market Research is Perceived to be Beneficial to Consumers





Globally, the perceived benefit of market research to consumers remains positive, with meaningful gains in both Japan and Germany.

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

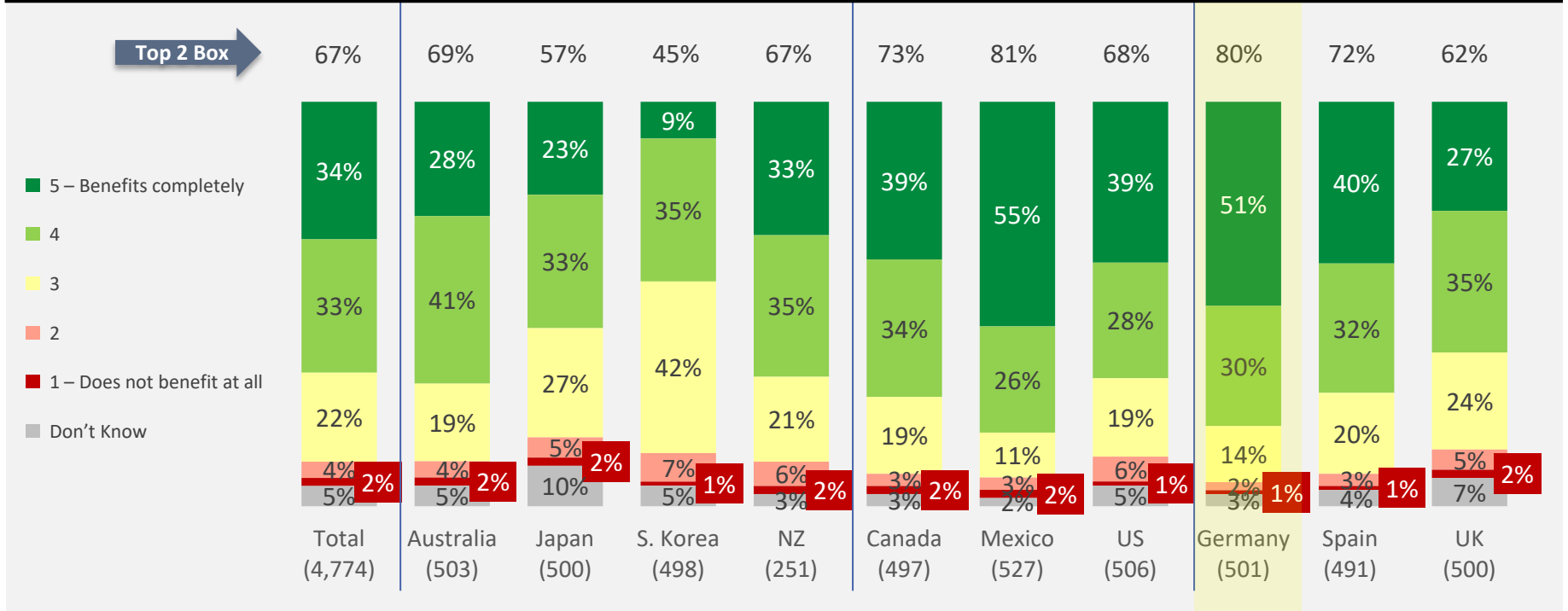




Many consider market research highly beneficial to businesses, especially those in Mexico and Germany.



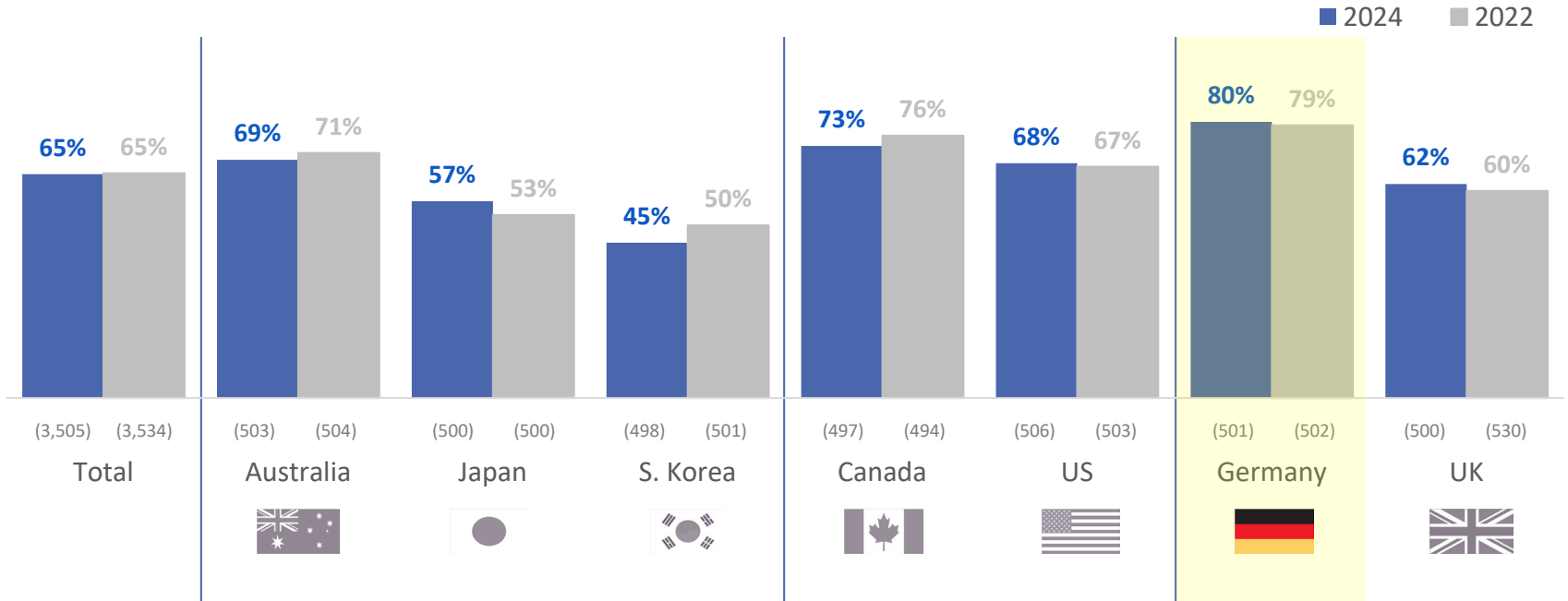
Extent Market Research is Perceived to be Beneficial to Business





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

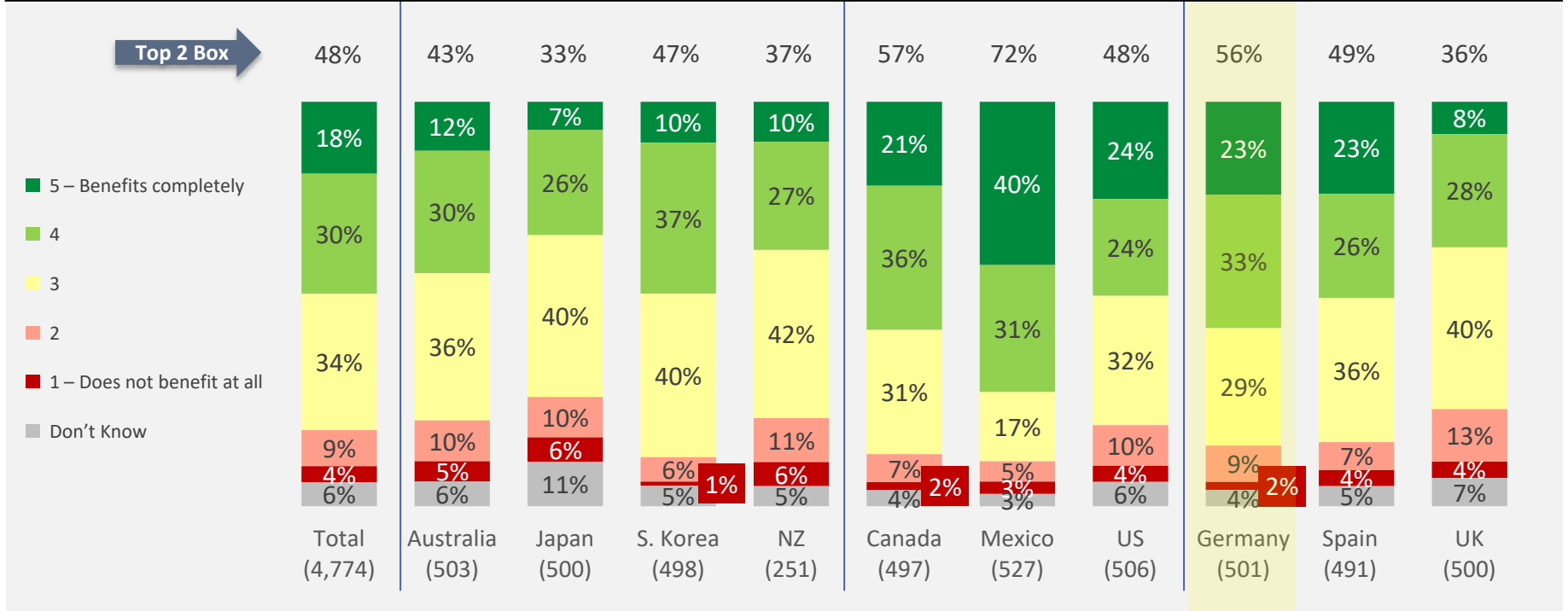




More than half recognize the benefits of market research to citizens in Germany.



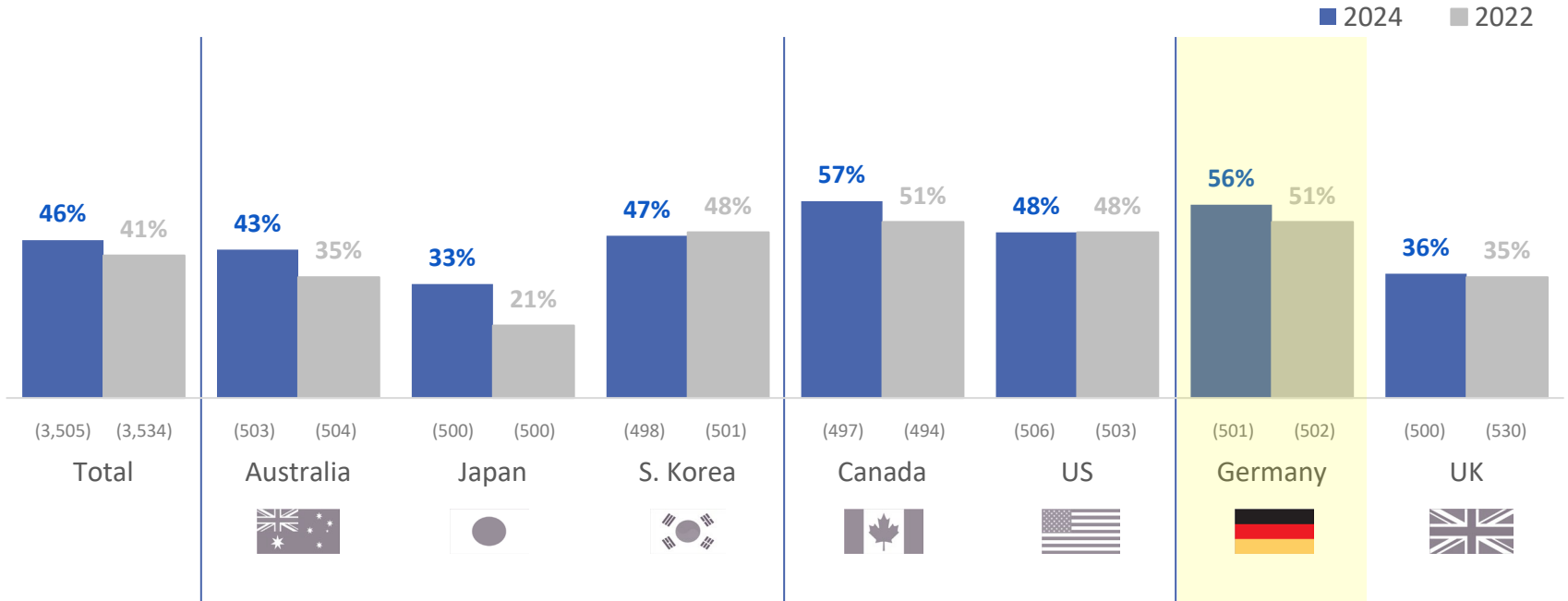
Extent Market Research is Perceived to be Beneficial to Citizens





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

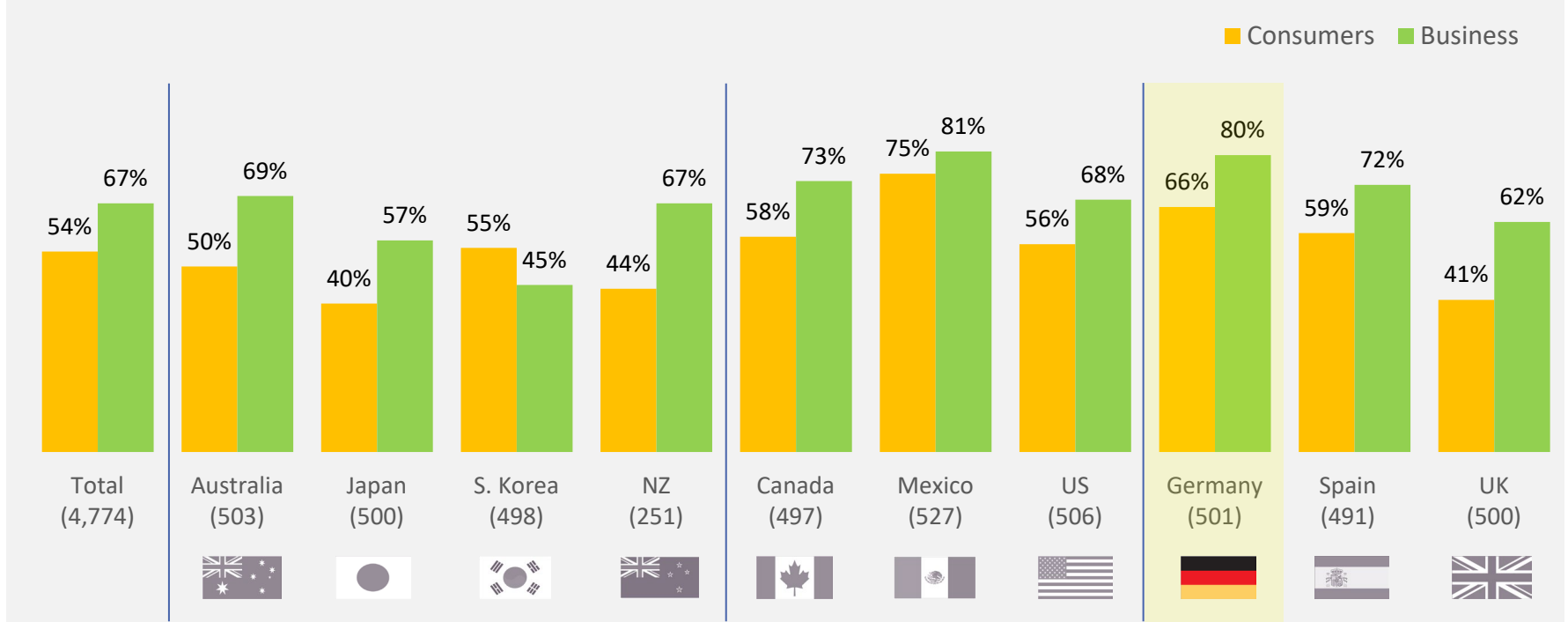
Extent Market Research is Perceived to be Beneficial to Citizens (Top 2 Box %) - Trended to 2022





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

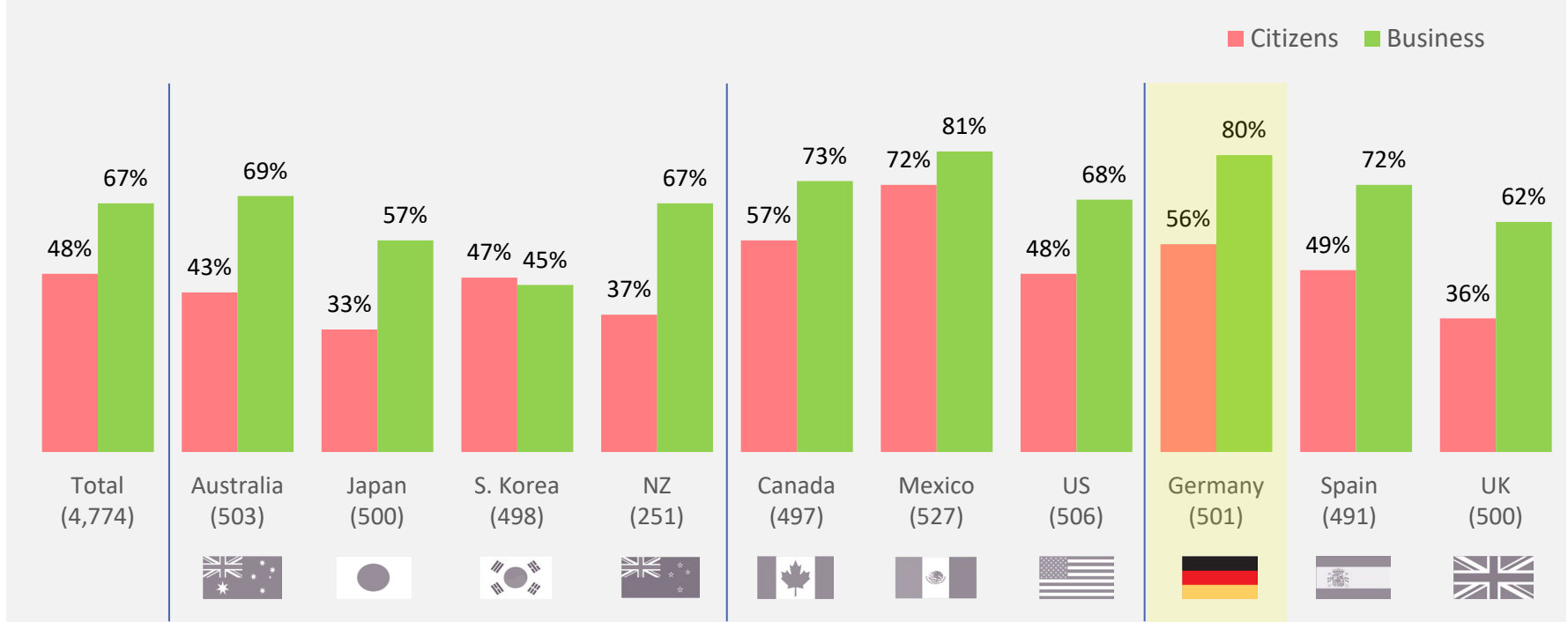
Extent Market Research is Perceived to be Beneficial to Consumers vs. Business (Top 2 Box)



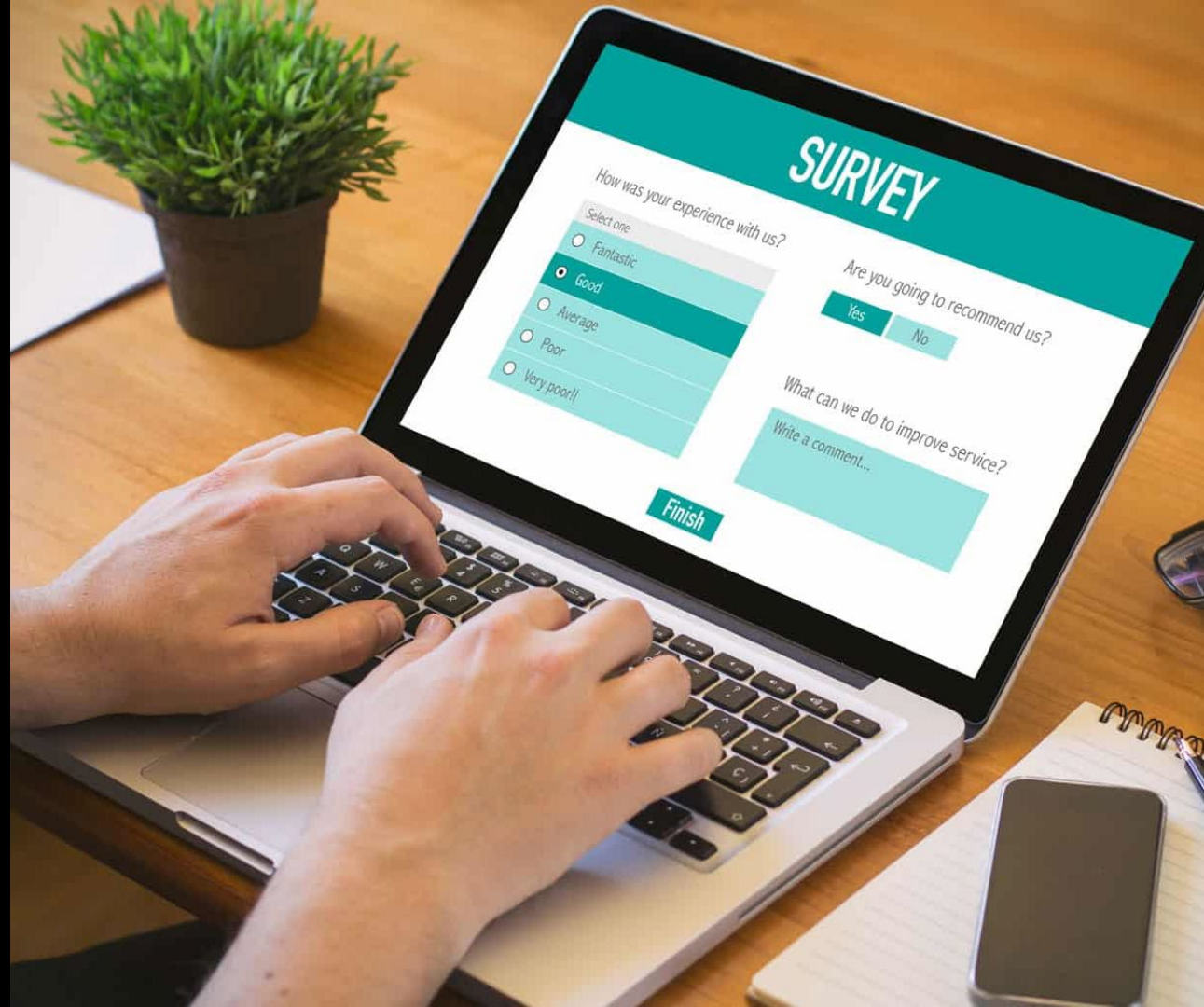


Likewise, market research is considered much more beneficial to businesses than to citizens on a global basis.

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



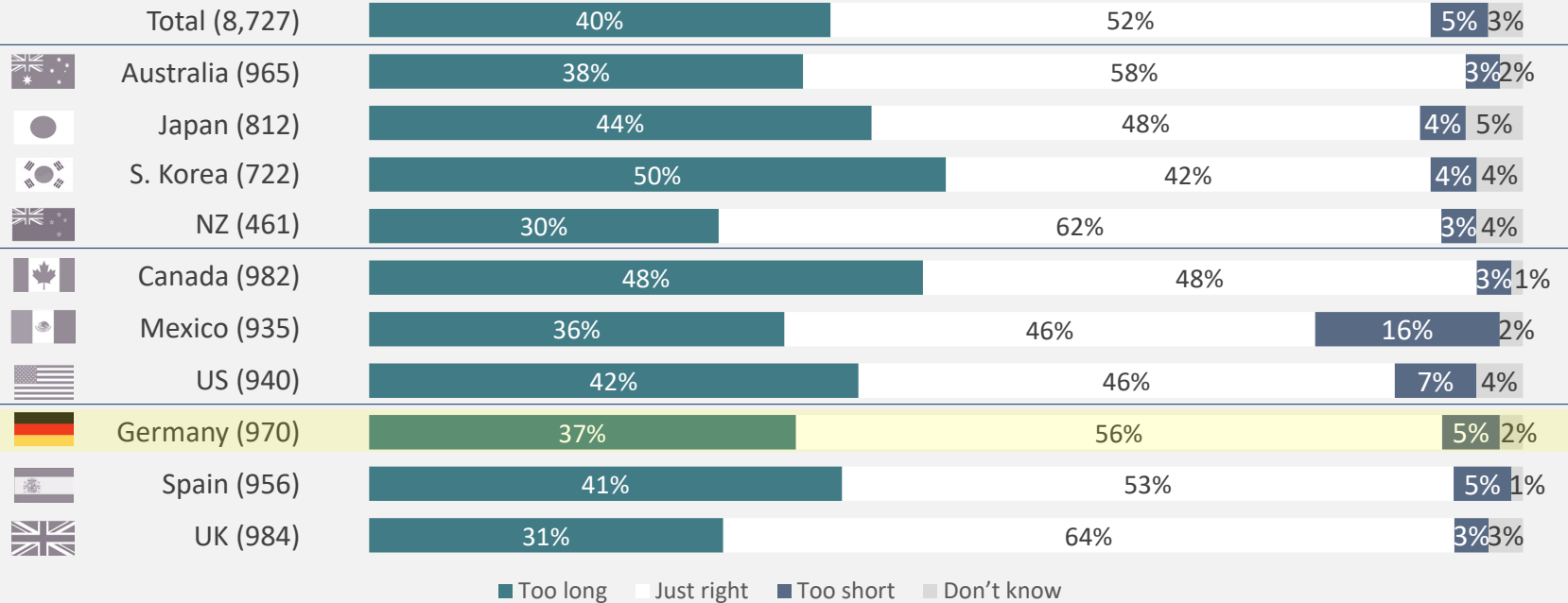
REACTIONS TO THE PARTICIPANT EXPERIENCE





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

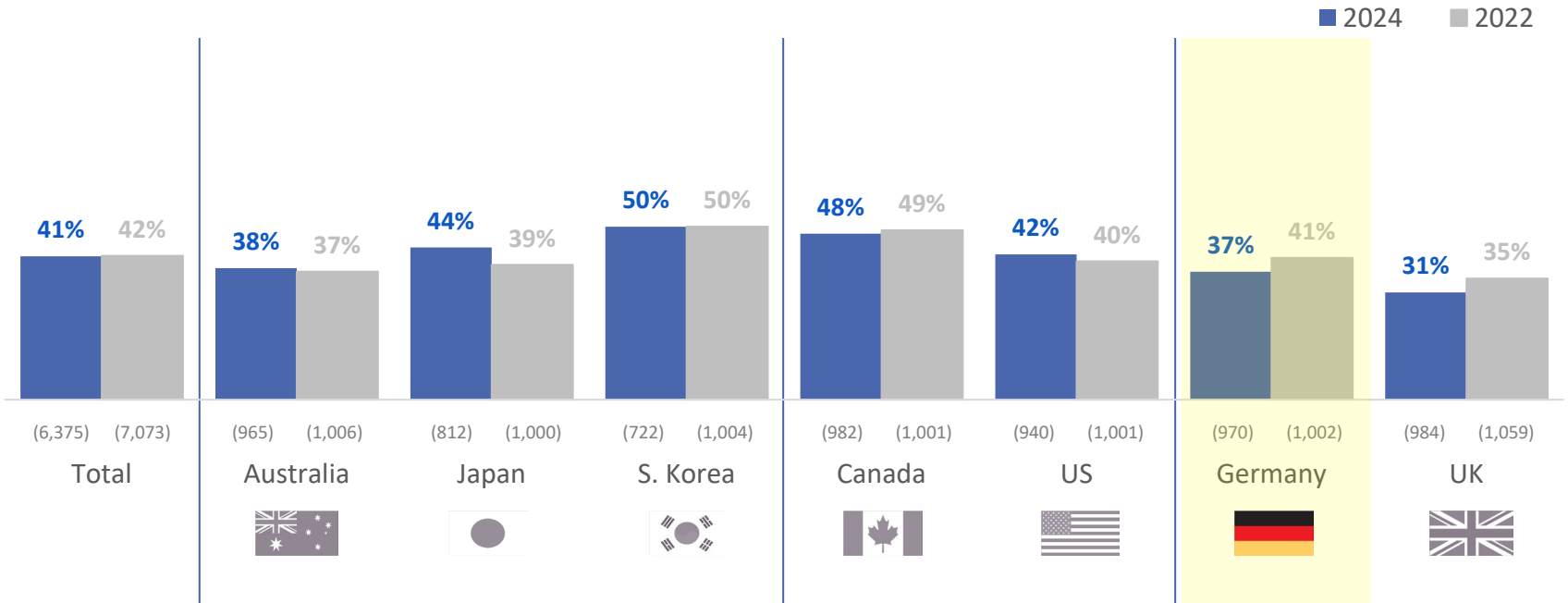
Perception of Survey Length





Survey length concerns are largely consistent with 2022.

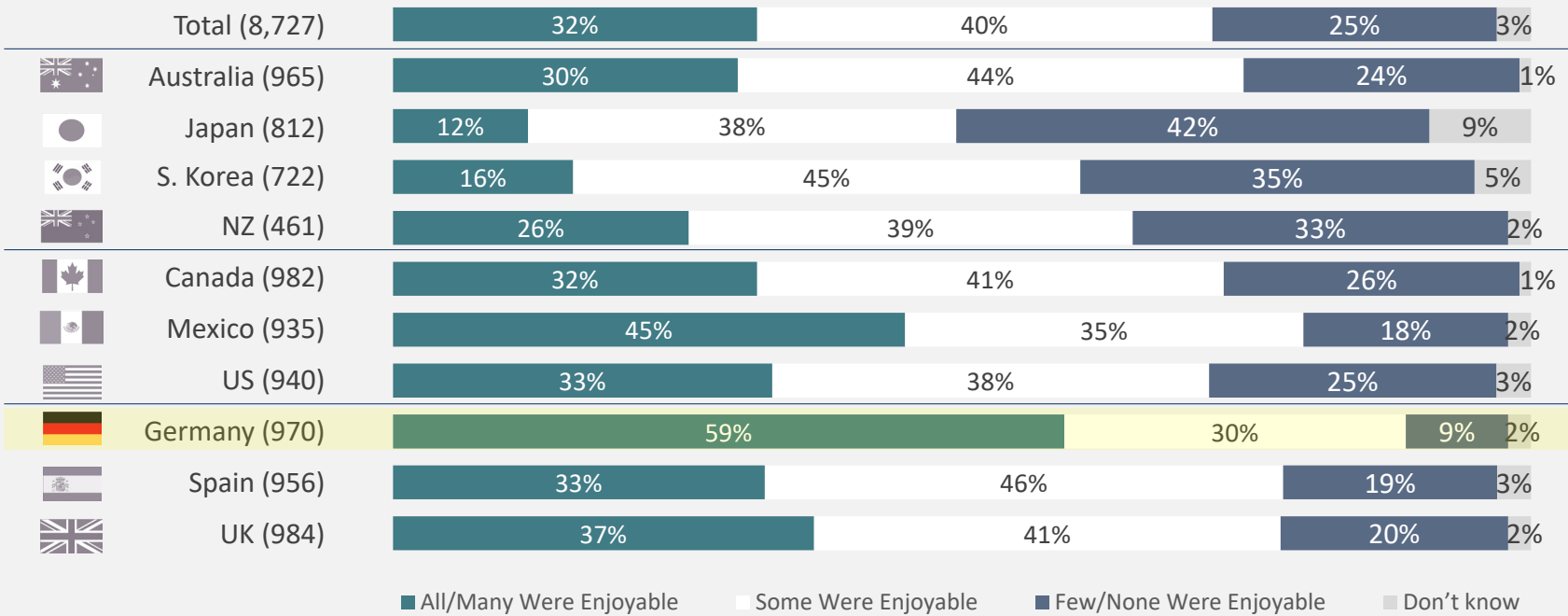
Perception of Survey Length (Too Long) - Trended to 2022





Survey enjoyment varies greatly across countries – Germany claims to have the most positive experiences, while those in Japan and South Korea are far less satisfied.

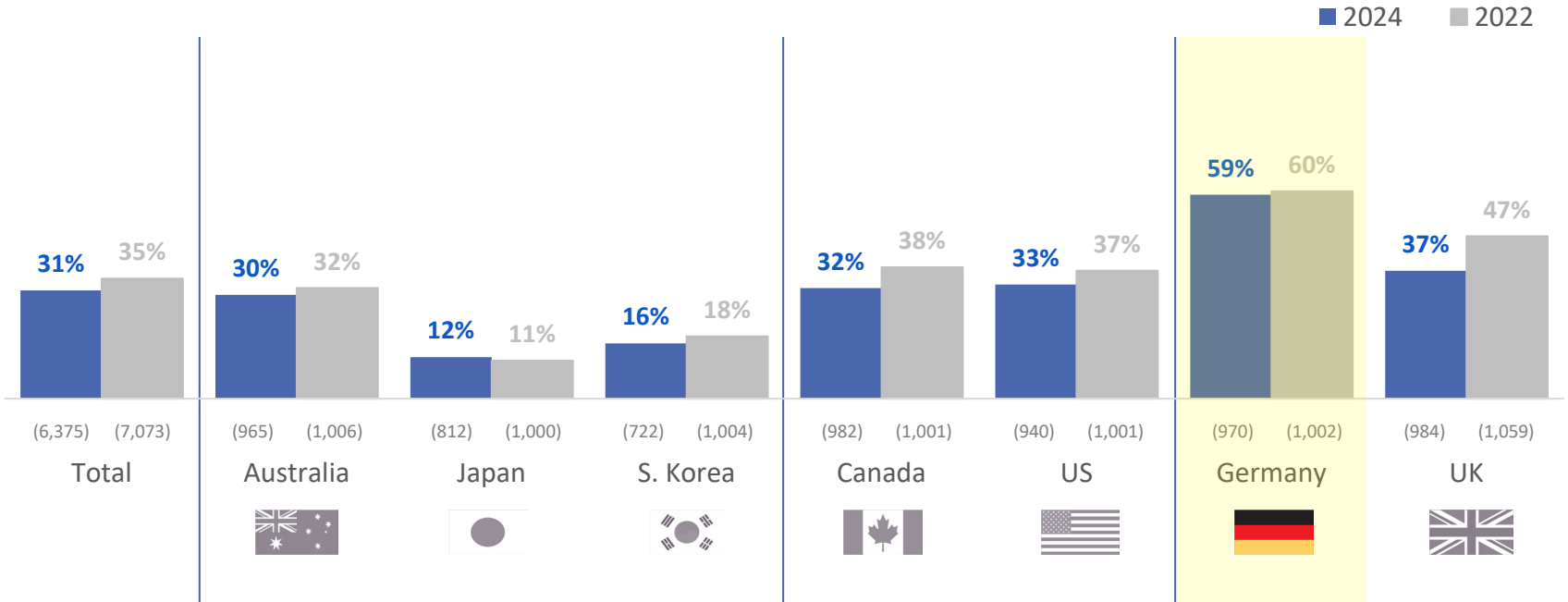
Perception of Survey Enjoyability





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

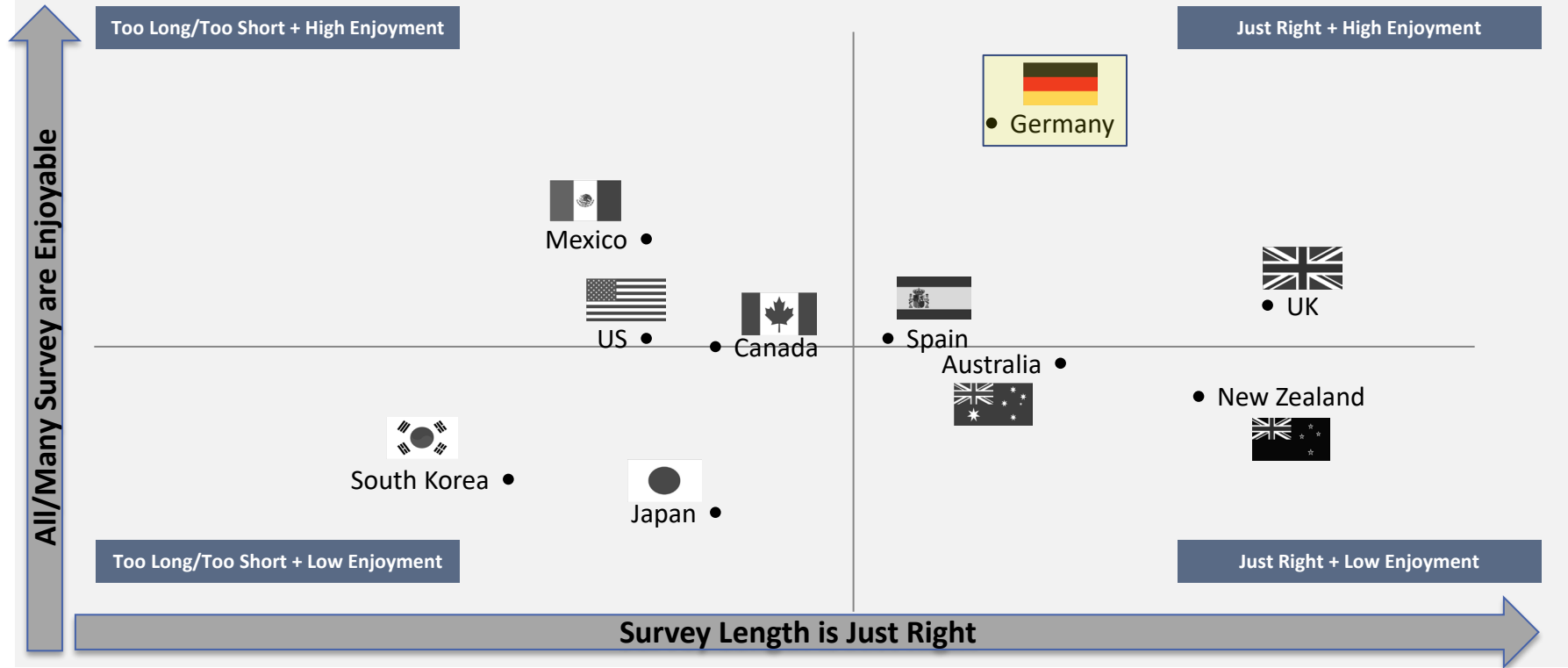
Perception of Survey Enjoyability (All/Many Were Enjoyable) - Trended to 2022





There's a positive relationship between survey length and enjoyment in Germany and the UK; however, New Zealanders report below-average enjoyment despite being content with survey length.

Relationship Between Survey Length & Enjoyability



PERSONAL DATA USE





While many are aware of how their personal data is collected and used, there's an opportunity for further education.



Germany



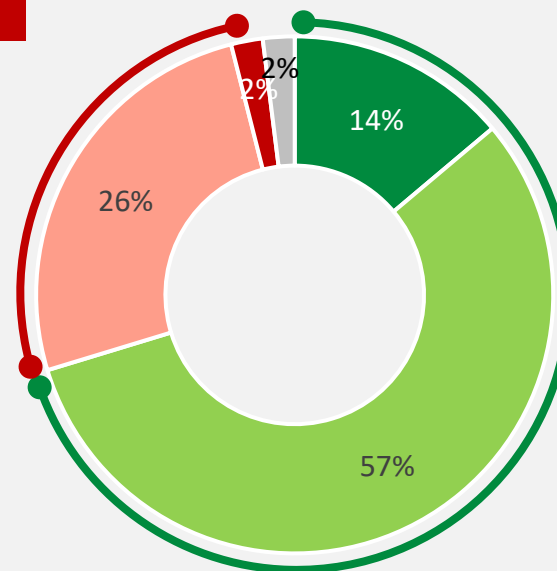
Familiarity with Personal Data Collection & Use

Not Very/At All Familiar

2024: 28%

Very/Somewhat Familiar

2024: 70%



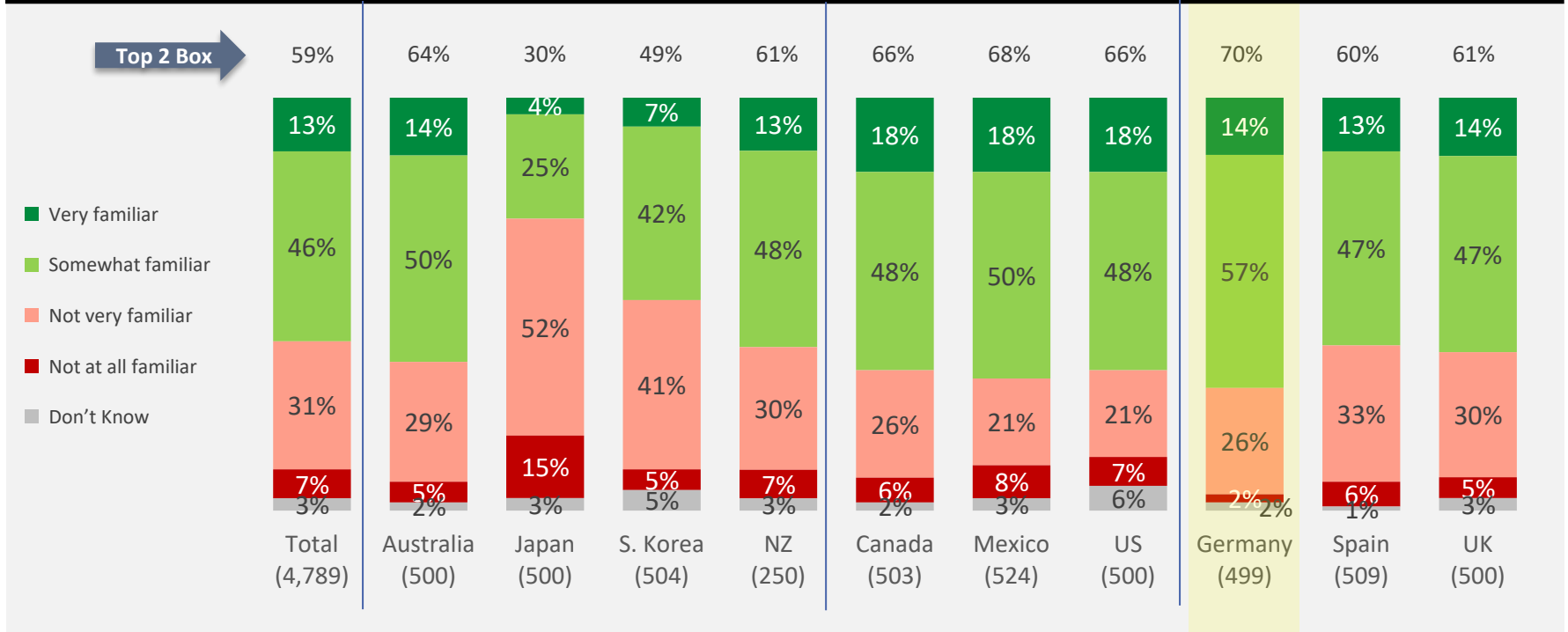
Very familiar Somewhat familiar Not very familiar Not at all familiar Don't Know



In Germany, familiarity with the collection and use of personal data is similar to levels seen around the globe, except for Japan, where familiarity levels are low.



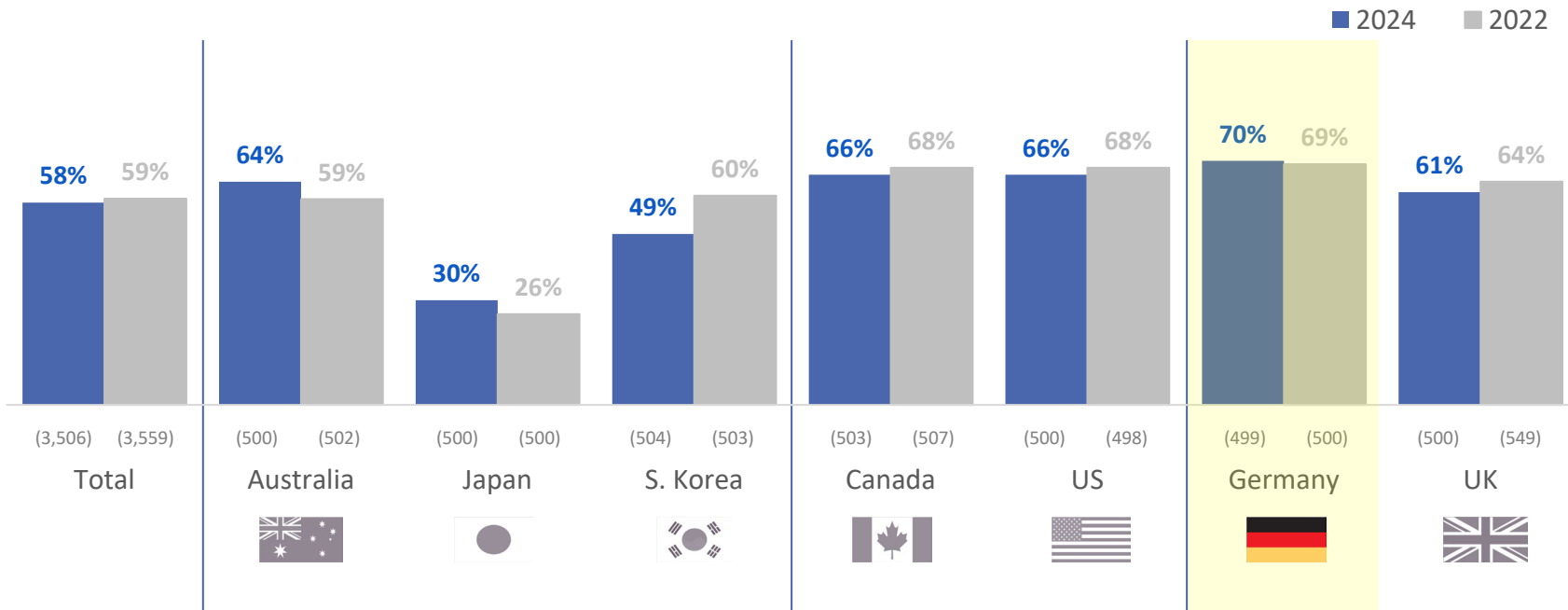
Familiarity with Personal Data Collection & Use





Familiarity in this regard is largely stable across most countries.

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





Misuse of personal data is still a major concern for most Germans.



Level of Concern Regarding Misuse of Personal Data

Not Very/At All Concerned

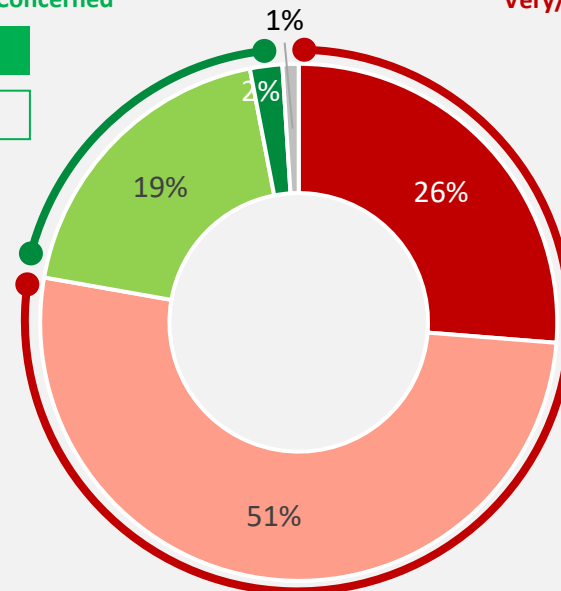
2024: 21%

2022: 24%

Very/Somewhat Concerned

2024: 78%

2022: 75%



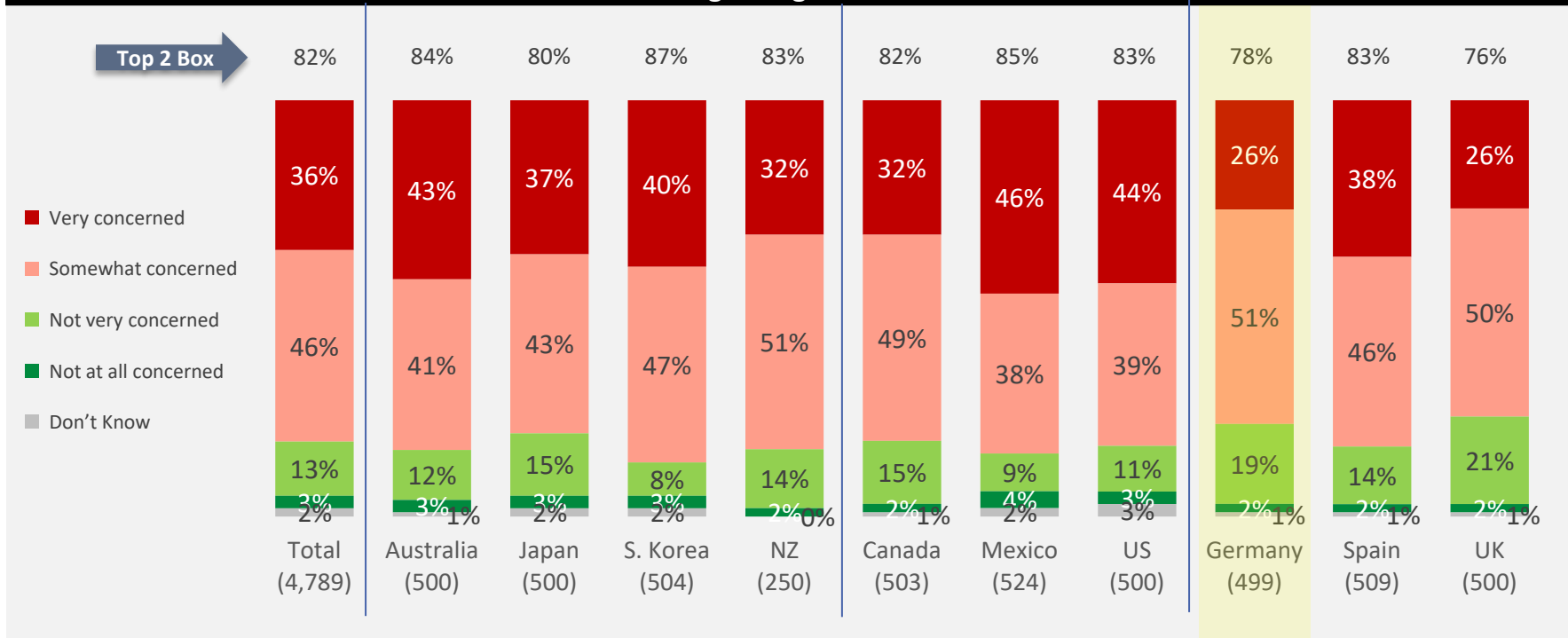
- Very concerned
- Somewhat concerned
- Not very concerned
- Not at all concerned
- Don't know/Prefer not to say



Concerns about the misuse of personal data are consistent globally.



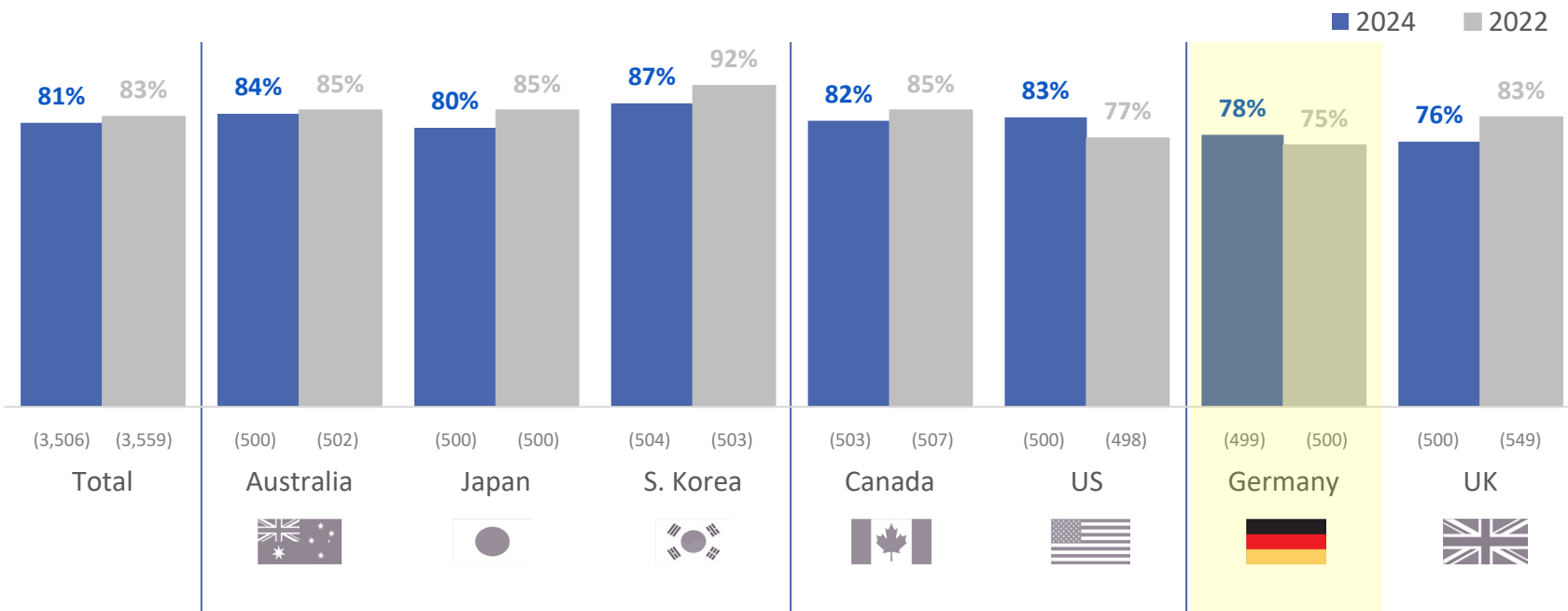
Level of Concern Regarding Misuse of Personal Data





Worries about misuse of data are just as prevalent as they were in 2022.

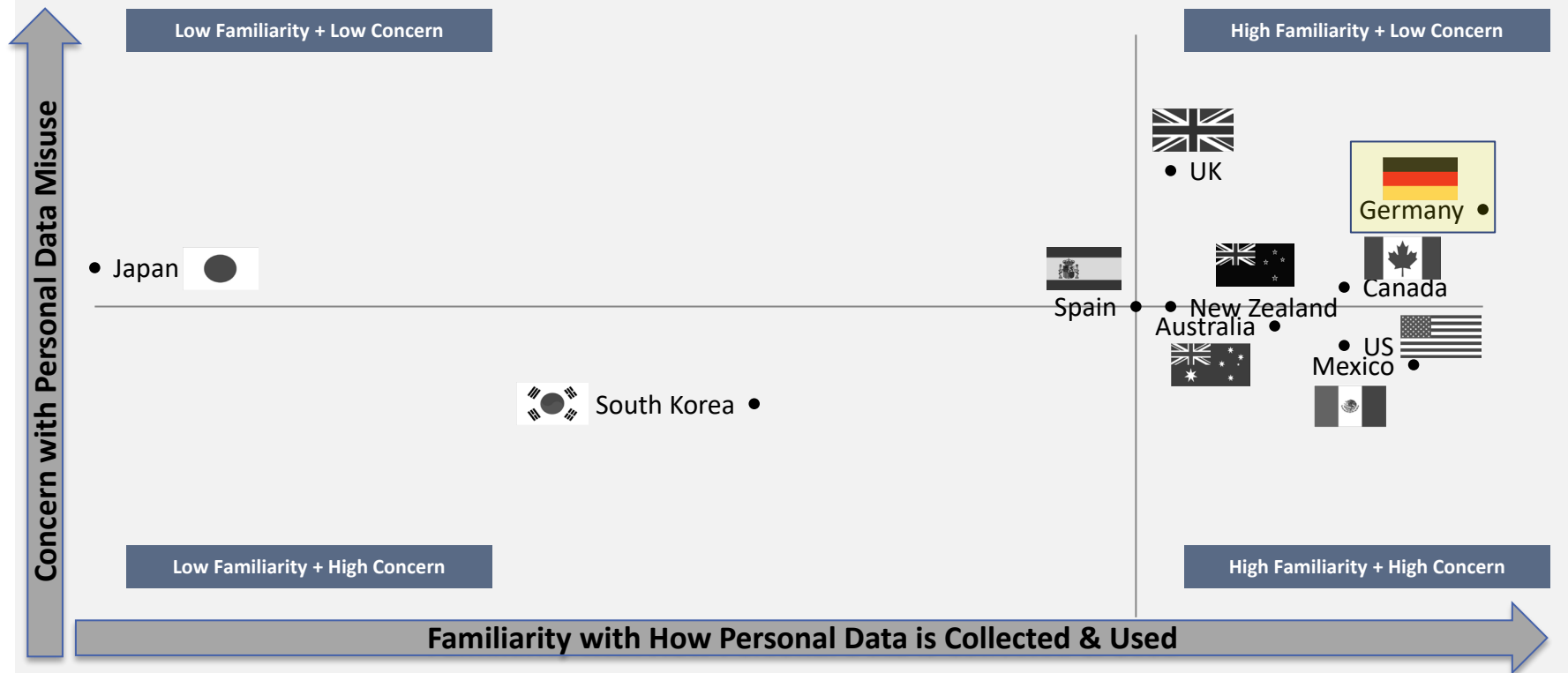
Level of Concern Regarding Misuse of Personal Data (Top 2 Box % - Very/Somewhat Concerned) - Trended to 2022





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**

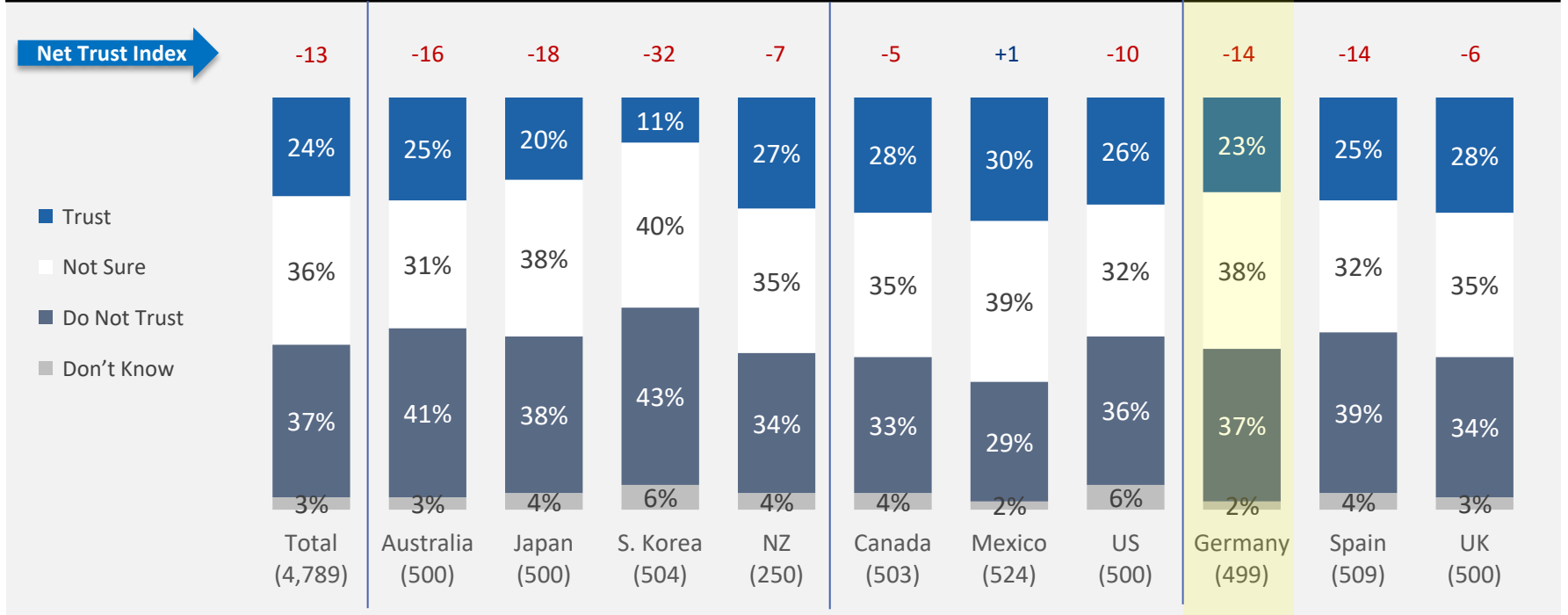




Concern exists in all countries regarding trust in organizations' abilities to protect and use consumer data responsibly.



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, particularly in Germany.

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	-16	-18	-32	-5	-10	-14	-6
	vs. 2022	-6	-4	-6	-7	-5	-6	-12	-8
% Trust →	2024	23%	25%	20%	11%	28%	26%	23%	28%
	vs. 2022	-3%	-1%	+1%	-1%	-4%	-4%	-6%	-4%
% Do Not Trust →	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

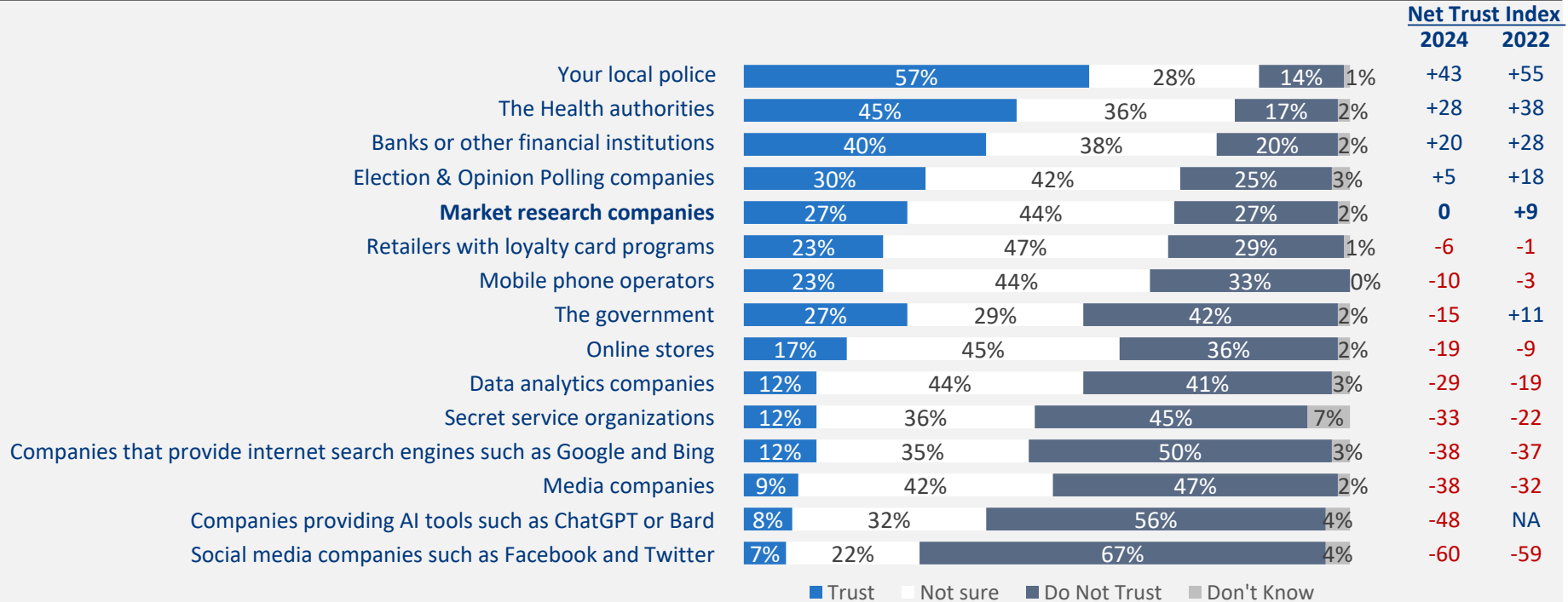


Law enforcement, healthcare authorities and financial institutions hold the public's highest trust in safeguarding personal data in Germany. While election & polling and market research companies rank in the top tier, they aren't deemed as trustworthy vs. 2022.



Germany

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



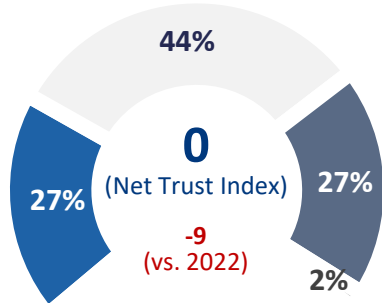
Net Trust Index = % Trust – % Do Not Trust



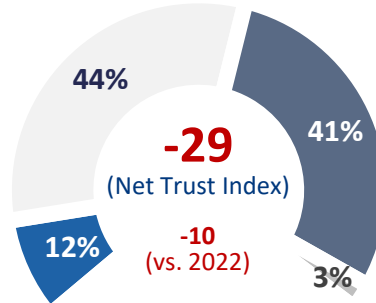
Distrust rose vs. 2022, with data analytics companies continuing to hold the bottom rung in the "insights space" regarding trust in protecting and using personal data.



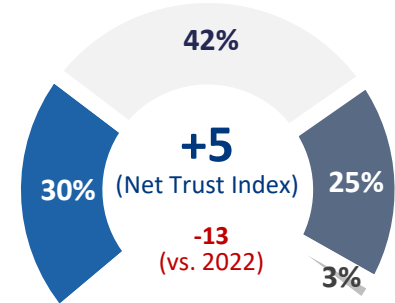
Trust in Market Research



Trust in Data Analytics



Trust in Election & Opinion Polling



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

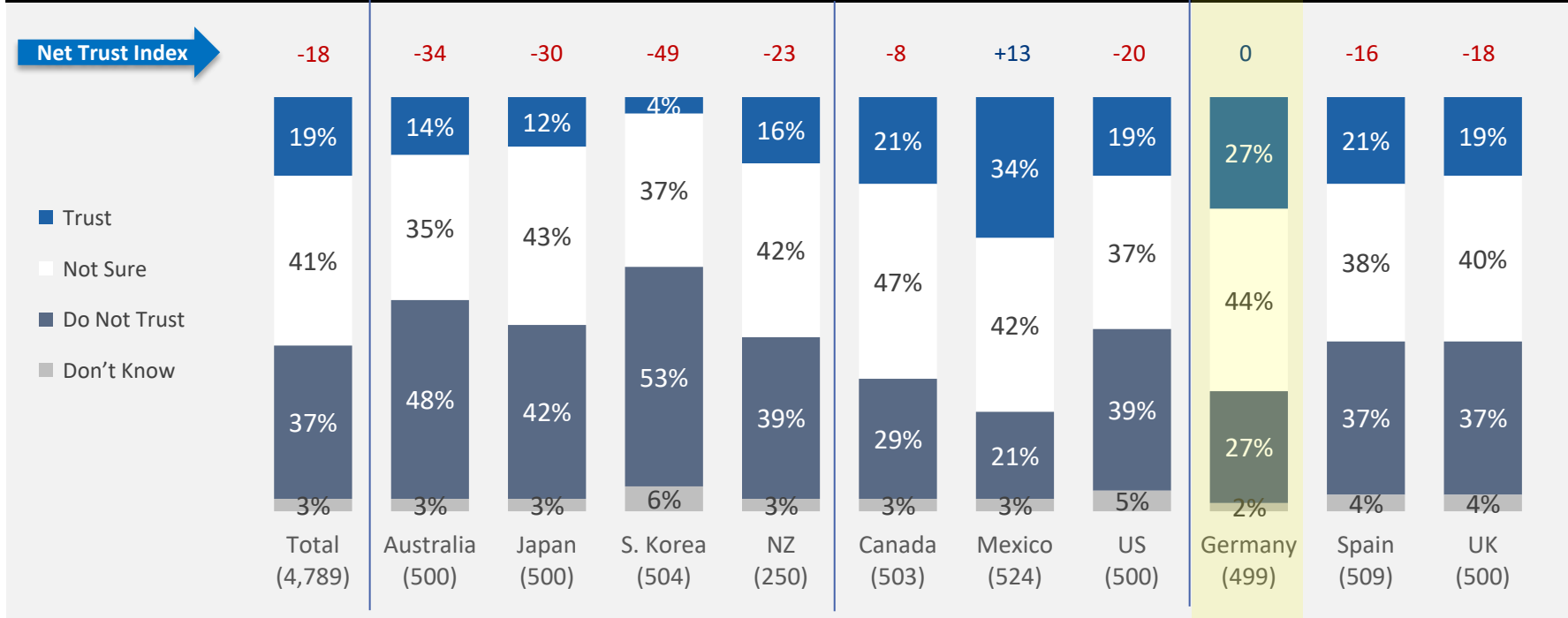
Net Trust Index = % Trust – % Do Not Trust



While there's little trust in the ability of market research companies to protect and use personal data responsibly, Germany performs above 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 almost all countries.

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

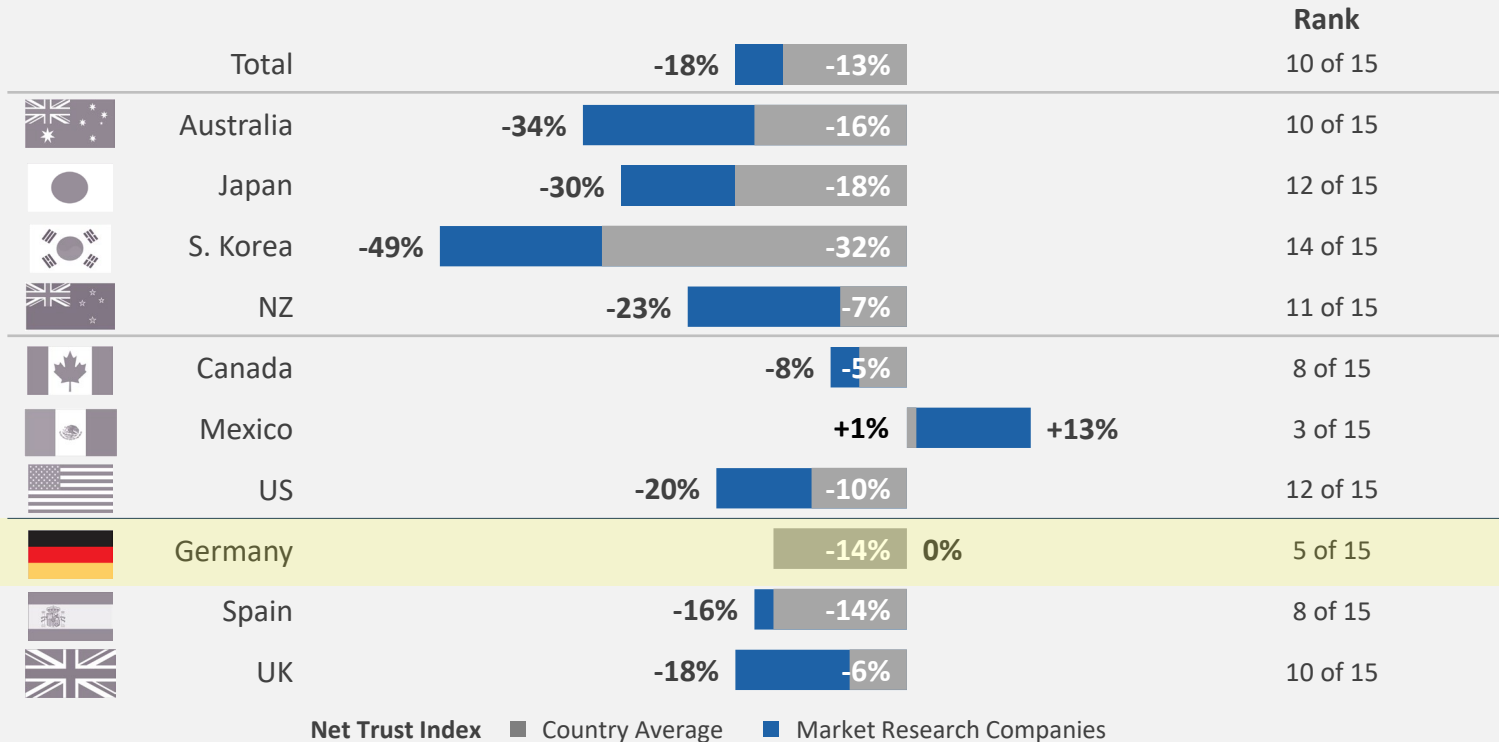
	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index	2024	-23	-34	-30	-49	-8	-20	--	-18
	vs. 2022	-5	--	-5	-12	+8	-12	-8	-7
% Trust	2024	17%	14%	12%	4%	21%	19%	27%	19%
	vs. 2022	-2%	--	+3%	-3%	+3%	-7%	-3%	-5%
% Do Not Trust	2024	39%	48%	42%	53%	29%	39%	27%	37%
	vs. 2022	+4%	+1%	+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 upper third in Mexico and Germany but rank lower in all other countries.

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



Net Trust Index = % Trust – % Do Not Trust



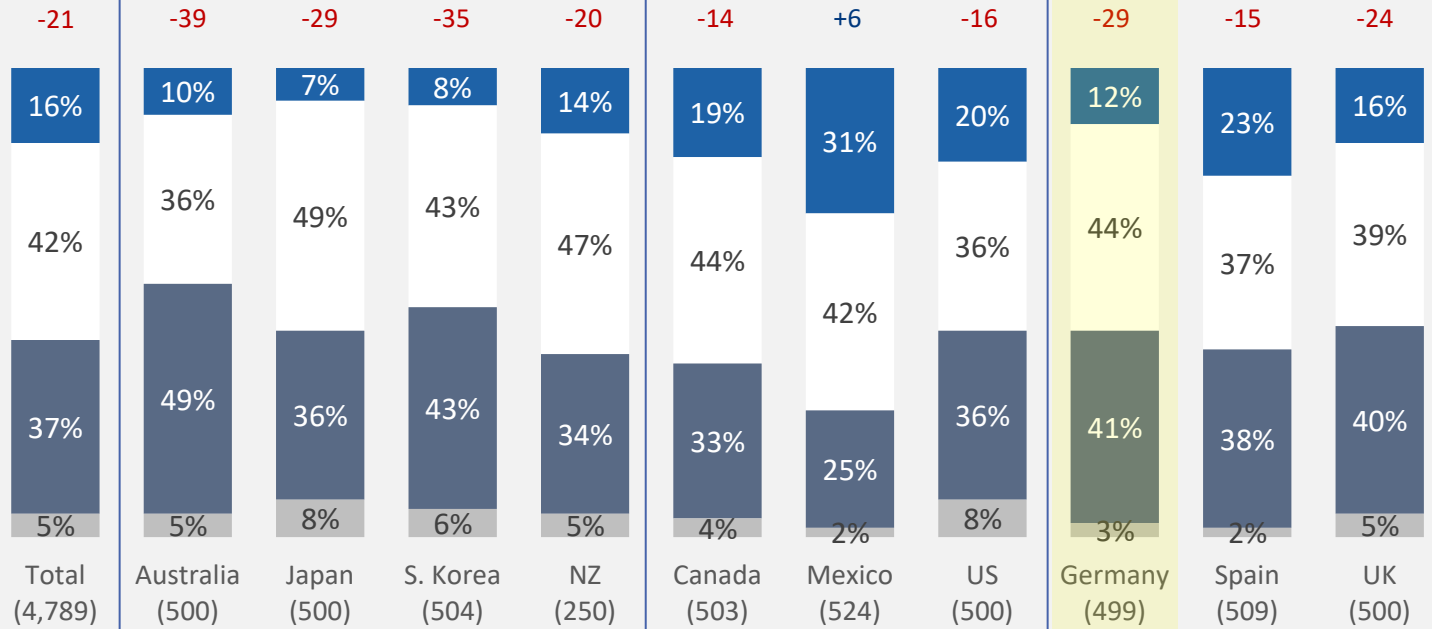
There's deep distrust in data analytics companies' perceived handling of personal data in nearly all countries.



Trust in Data Analytics to Protect & Appropriately Use Personal Data

Net Trust Index

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










Net Trust Index = % Trust – % Do Not Trust



Net trust remains negative overall, with distrust growing in most 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	-35	-14	-16	-29	-24
	vs. 2022	-5	-4	-6	-5	+2	-3	-10	-9
% Trust →	2024	13%	10%	7%	8%	19%	20%	12%	16%
	vs. 2022	-2%	-2%	--	-2%	+2%	-1%	-5%	-6%
% Do Not Trust →	2024	40%	49%	36%	43%	33%	36%	41%	40%
	vs. 2022	+3%	+2%	+6%	+3%	--	+2%	+5%	+3%

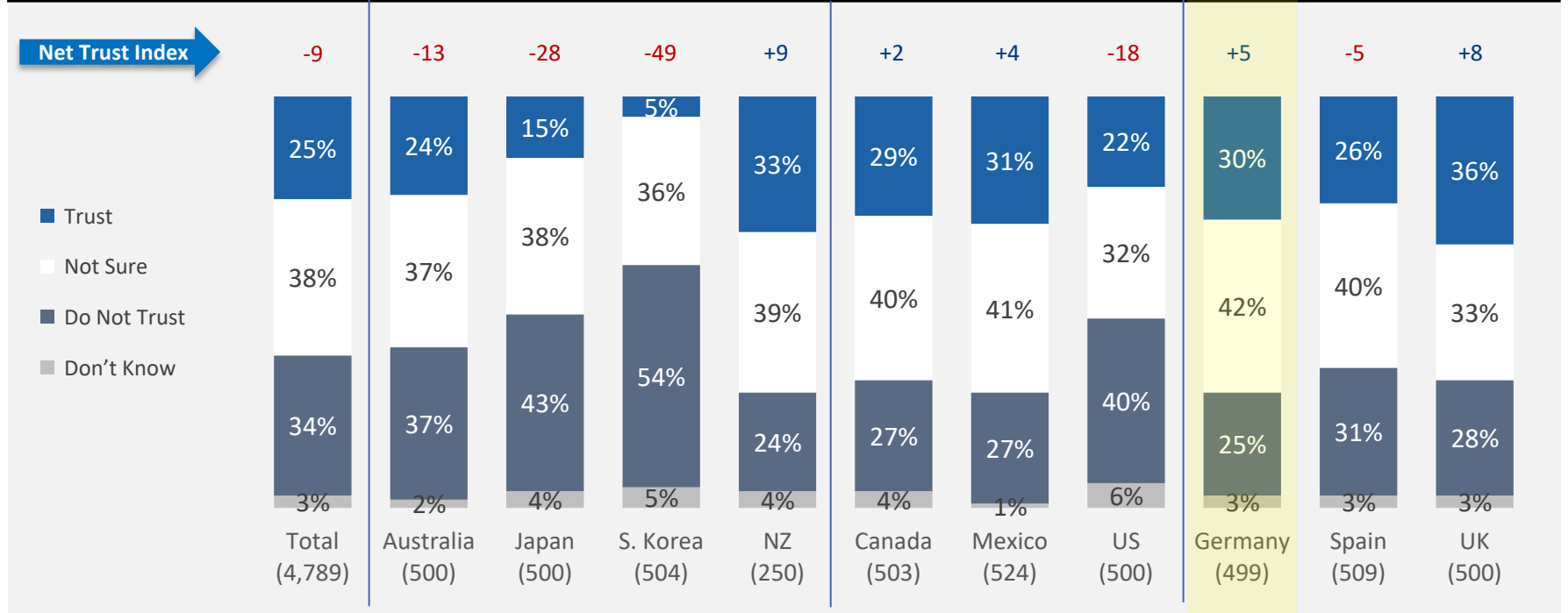
Net Trust Index = % Trust – % Do Not Trust
*Total based on comparable countries across waves.



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




Trust in election & opinion polling companies' data privacy practices dropped globally, led by Germany and South Korea.

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	-13	-28	-49	+2	-18	+5	+8
	vs. 2022	-4	-1	-5	-9	--	+1	-14	-1
% Trust	2024	23%	24%	15%	5%	29%	22%	30%	36%
	vs. 2022	-1%	-3%	+4%	-2%	-2%	-1%	-8%	+3%
% Do Not Trust	2024	36%	37%	43%	54%	27%	40%	25%	28%
	vs. 2022	+3%	-2%	+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 is centered over the text, which is arranged in a vertical list. The text is in a bold, sans-serif font, with some words in a larger size 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



Consistent with 2022, only about one-third of Germans feel the use of their personal data by market research companies is appropriate.



Appropriate Use of Personal Data by Market Research

Bottom 2 Box: Inappropriate

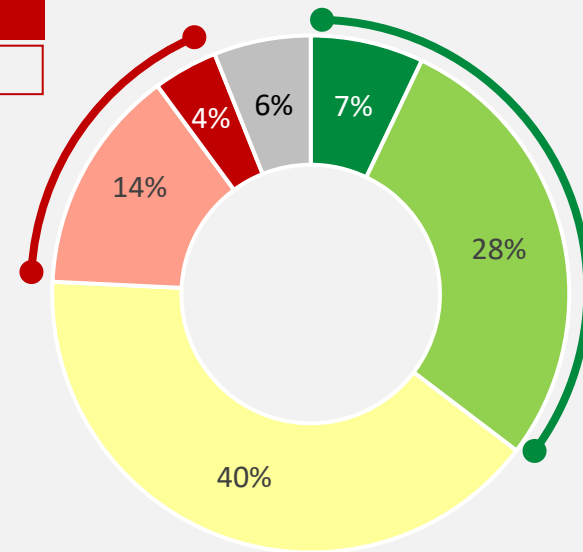
2024: 18%

2022: 14%

Top 2 Box: Appropriate

2024: 36%

2022: 37%



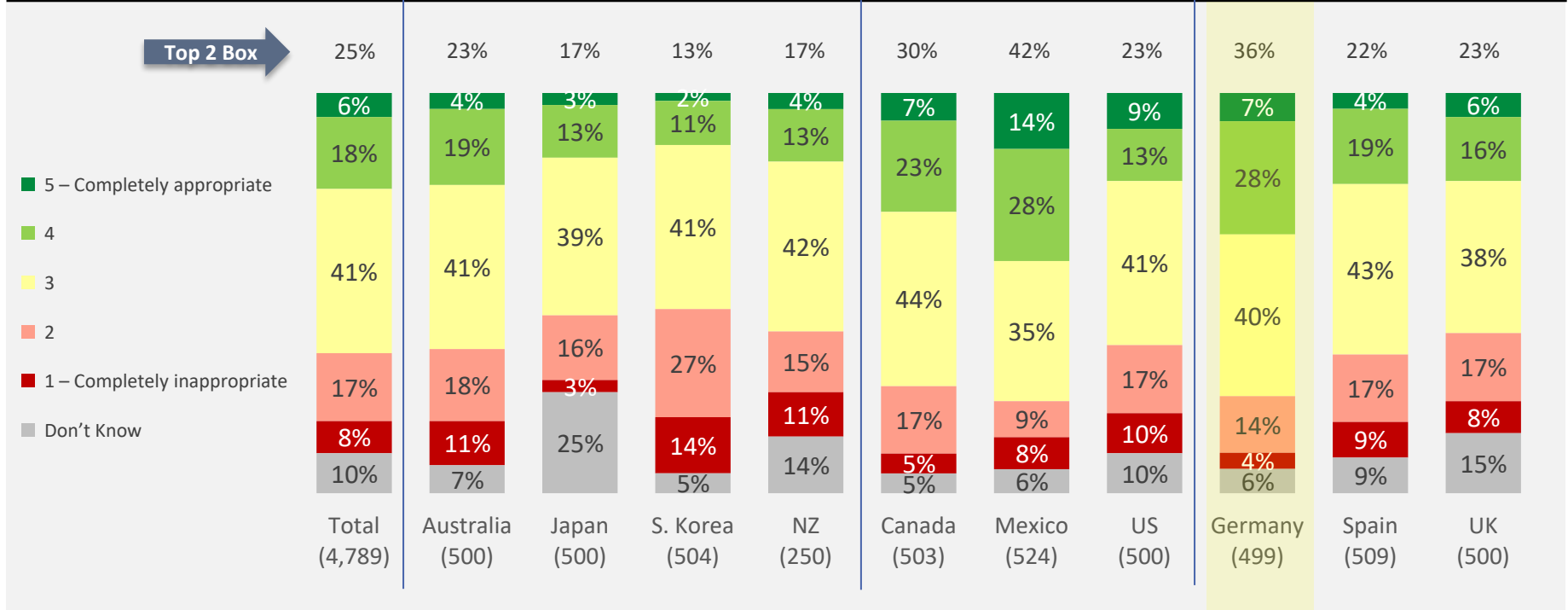
■ 5 - Completely appropriate ■ 4 ■ 3 ■ 2 ■ 1 - Completely inappropriate ■ Don't know



There's mixed sentiment across countries – Mexico and Germany are the most favorable, while South Korea, Japan and New Zealand are least so.



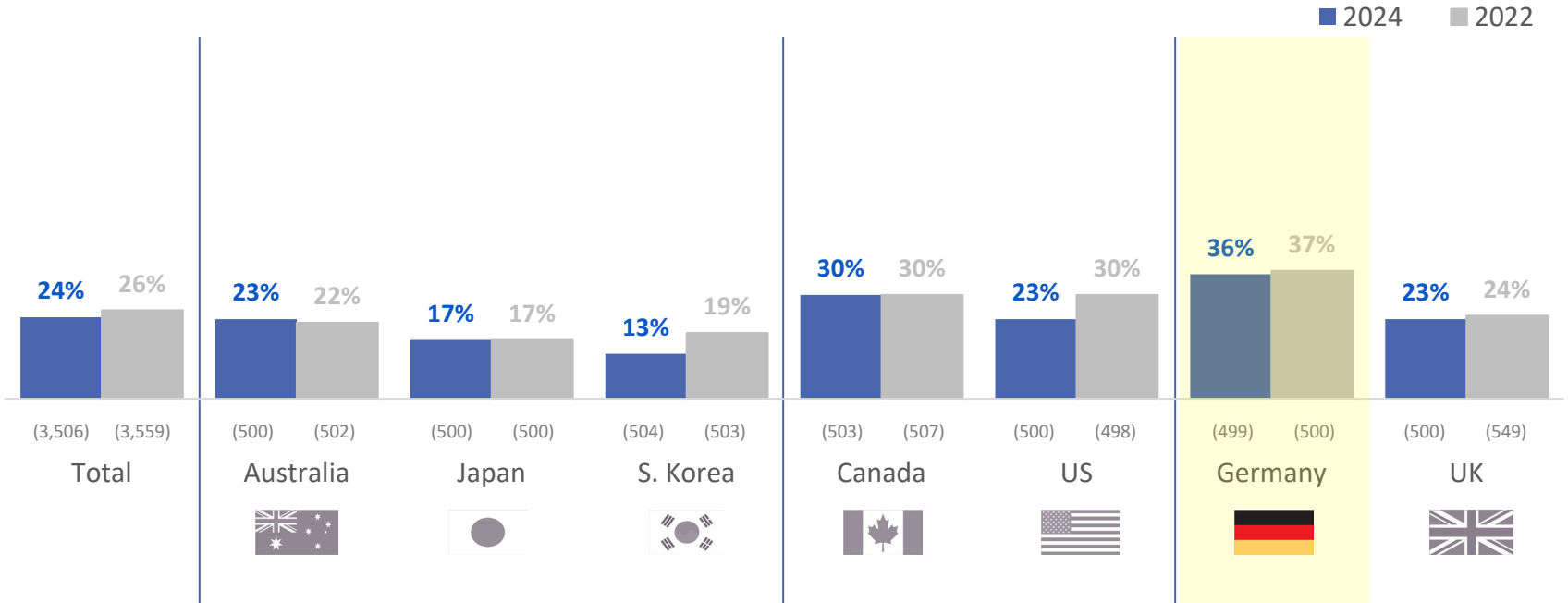
Appropriate Use of Personal Data by Market Research





Feelings about market research companies appropriate use of personal data are largely 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.



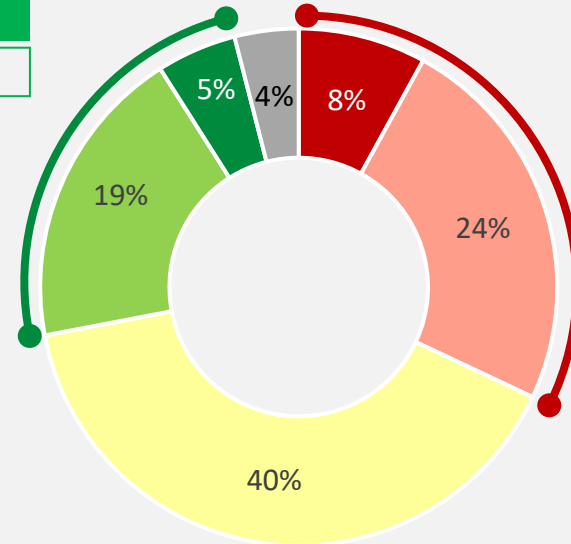
Concern that Market Research Securely Protects Personal Data

Bottom 2 Box: Not Concerned

2024: 25%
2022: 28%

Top 2 Box: Concerned

2024: 32%
2022: 29%



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

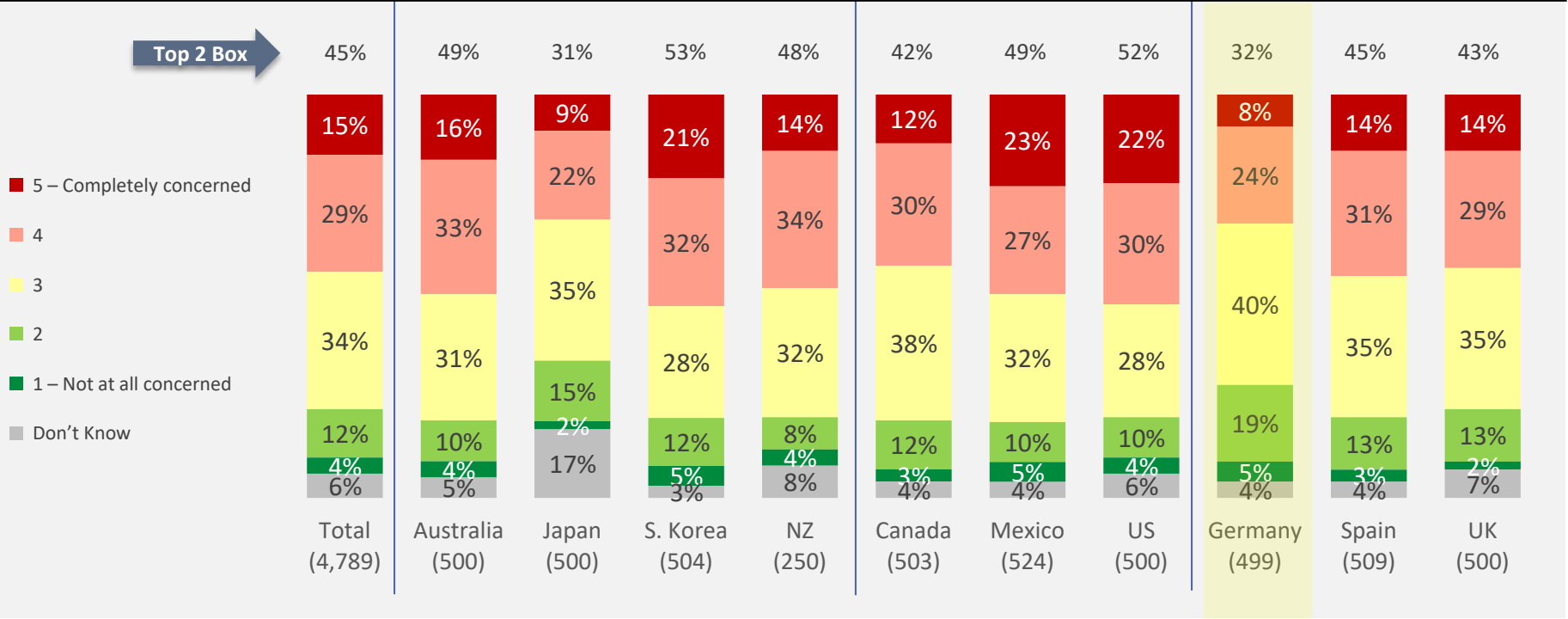


Concern in this regard is lowest in Japan and Germany.



Concern that Market Research Securely Protects Personal Data

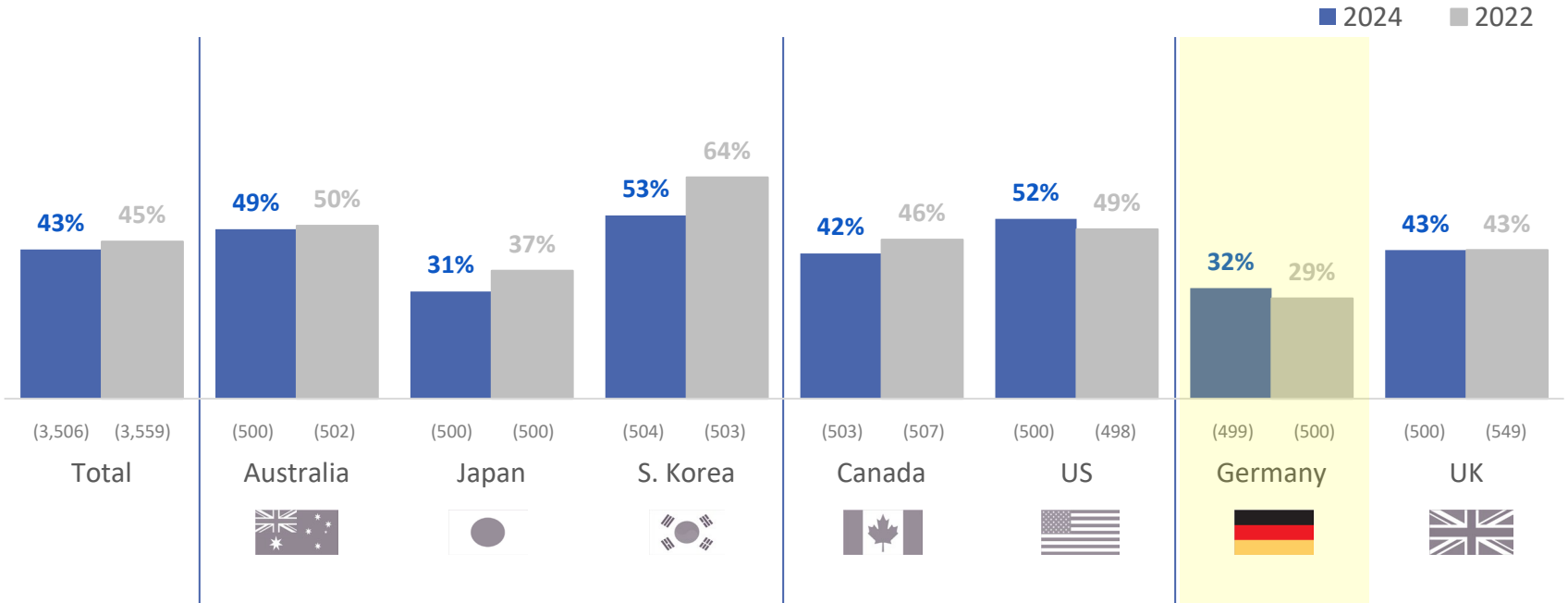
Top 2 Box →





Concern in this regard is largely stable globally vs. 2022.

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, and very few feel completely informed.



Degree Informed about Personal Data Collection, Storage & Use

Bottom 2 Box: Not Informed

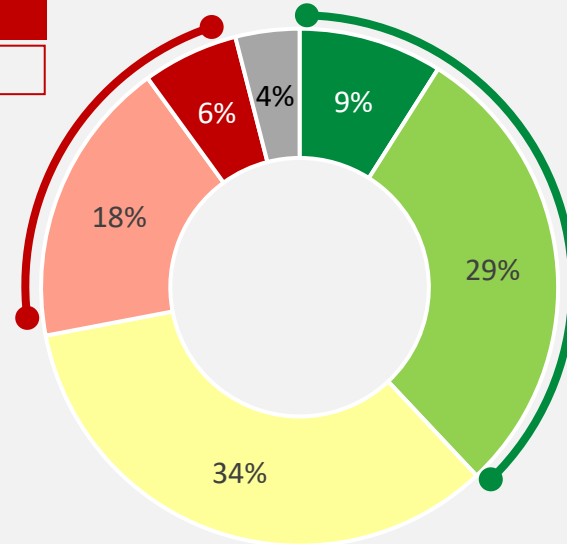
2024: 24%

2022: 23%

Top 2 Box: Informed

2024: 38%

2022: 39%



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

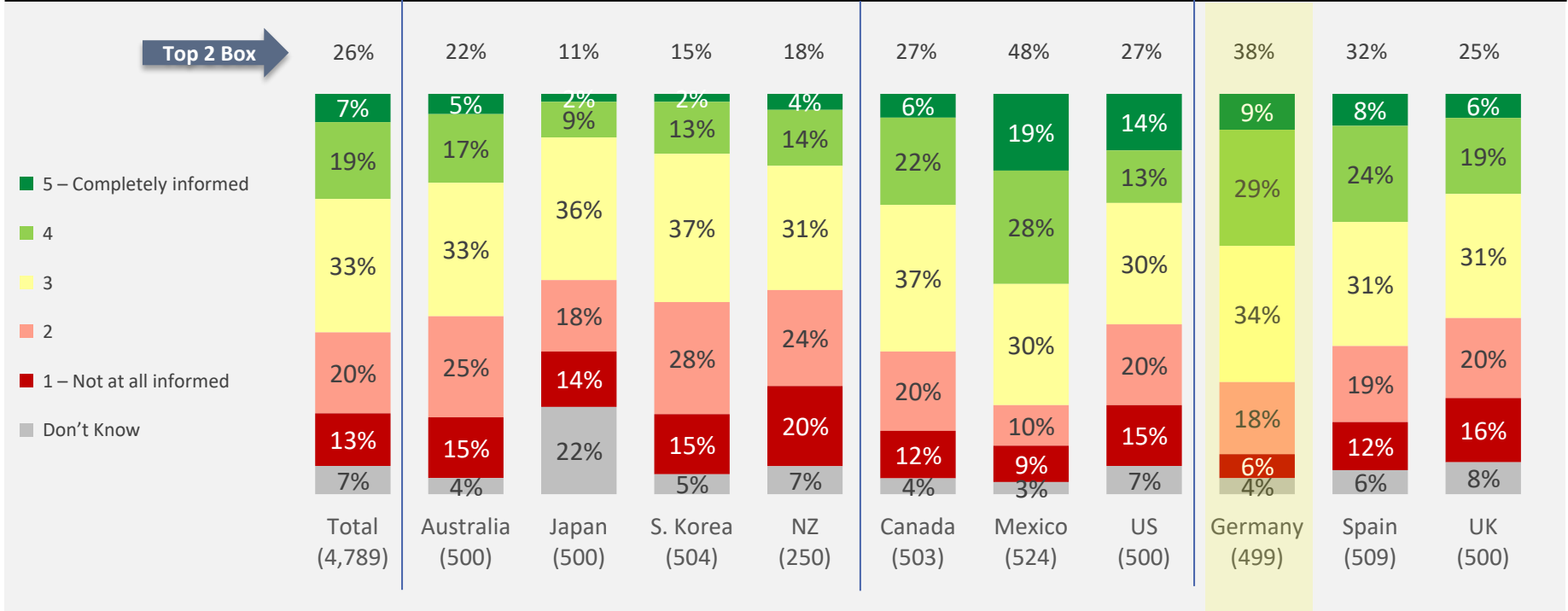




Consumers in Mexico and Germany feel the most informed, while those in Japan, South Korea and New Zealand feel the least so.



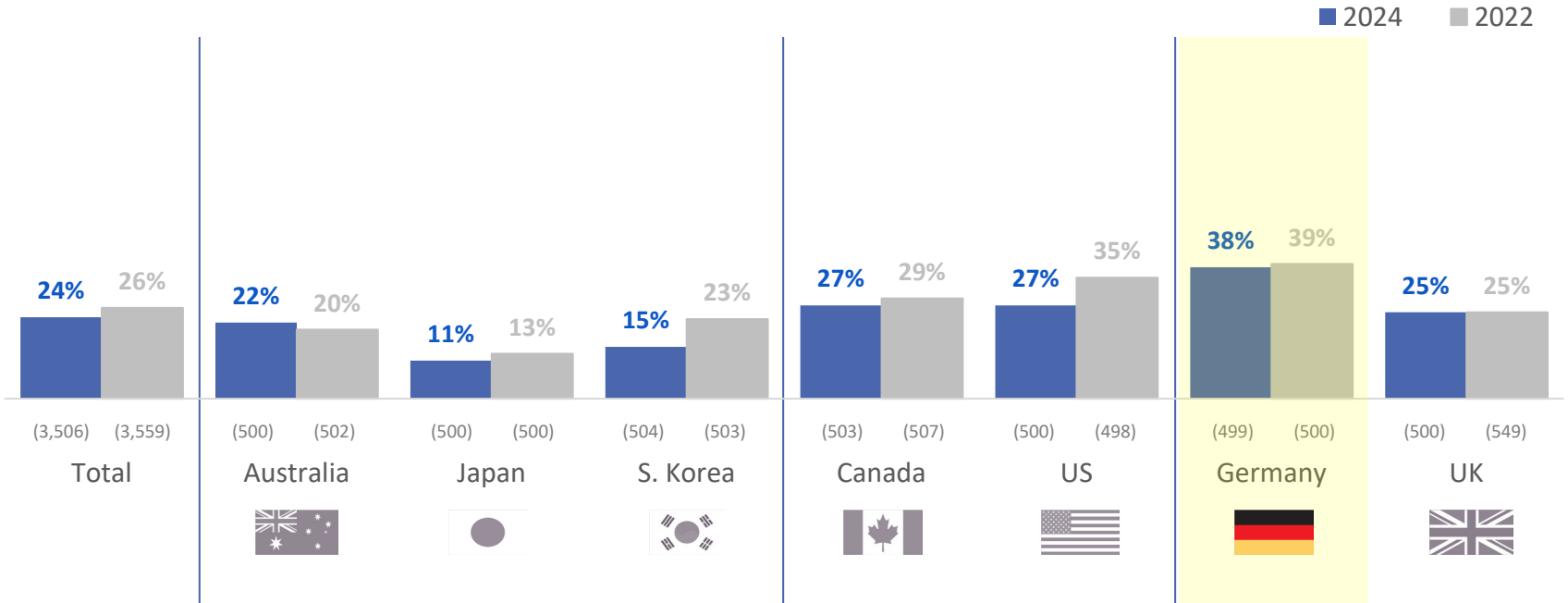
Degree Informed about Personal Data Collection, Storage & Use



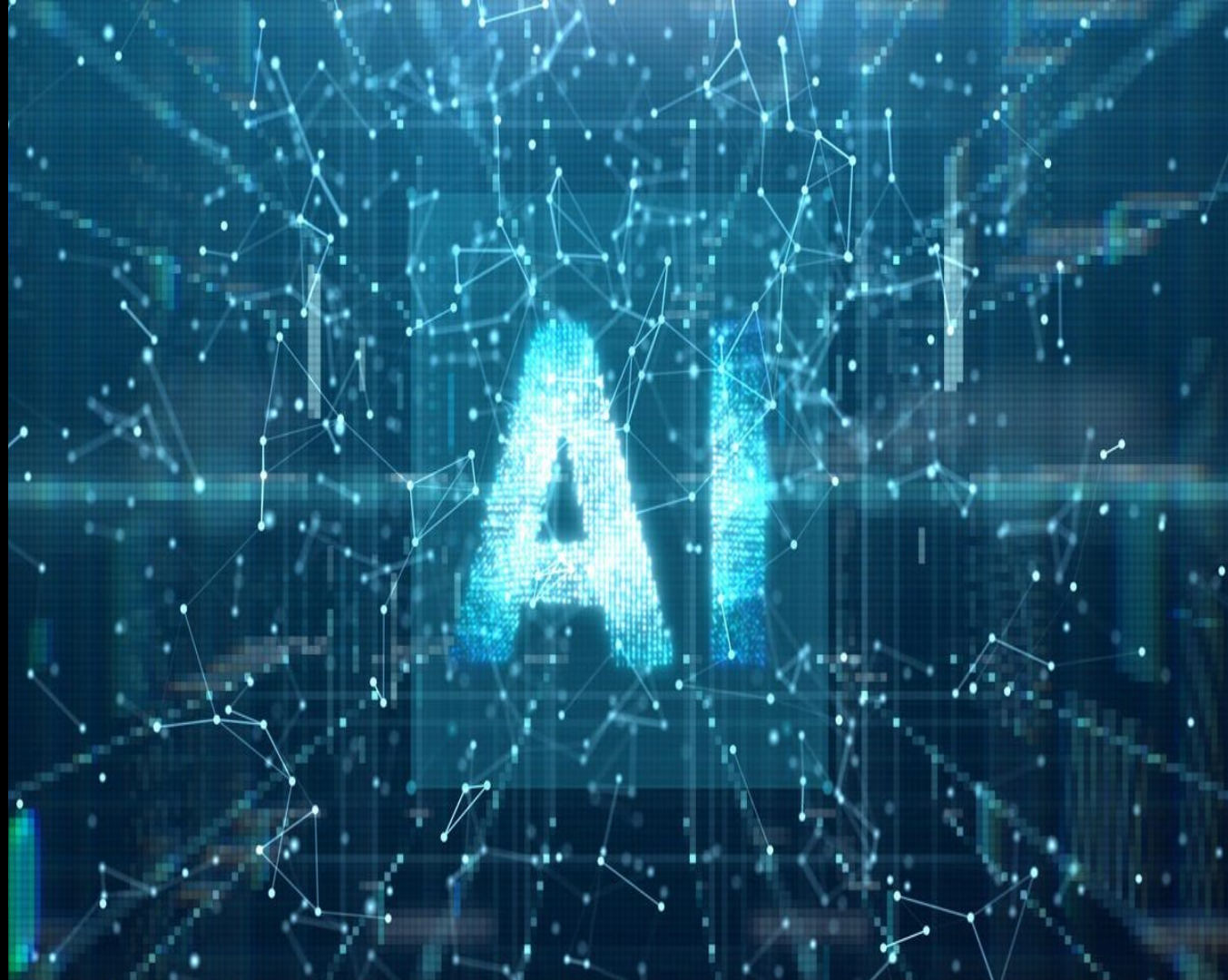


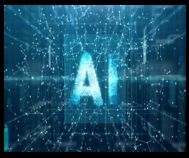
Sentiment in this regard is largely similar relative to 2022.

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



**HOW AI
IMPACTS
THE LEVEL OF TRUST**





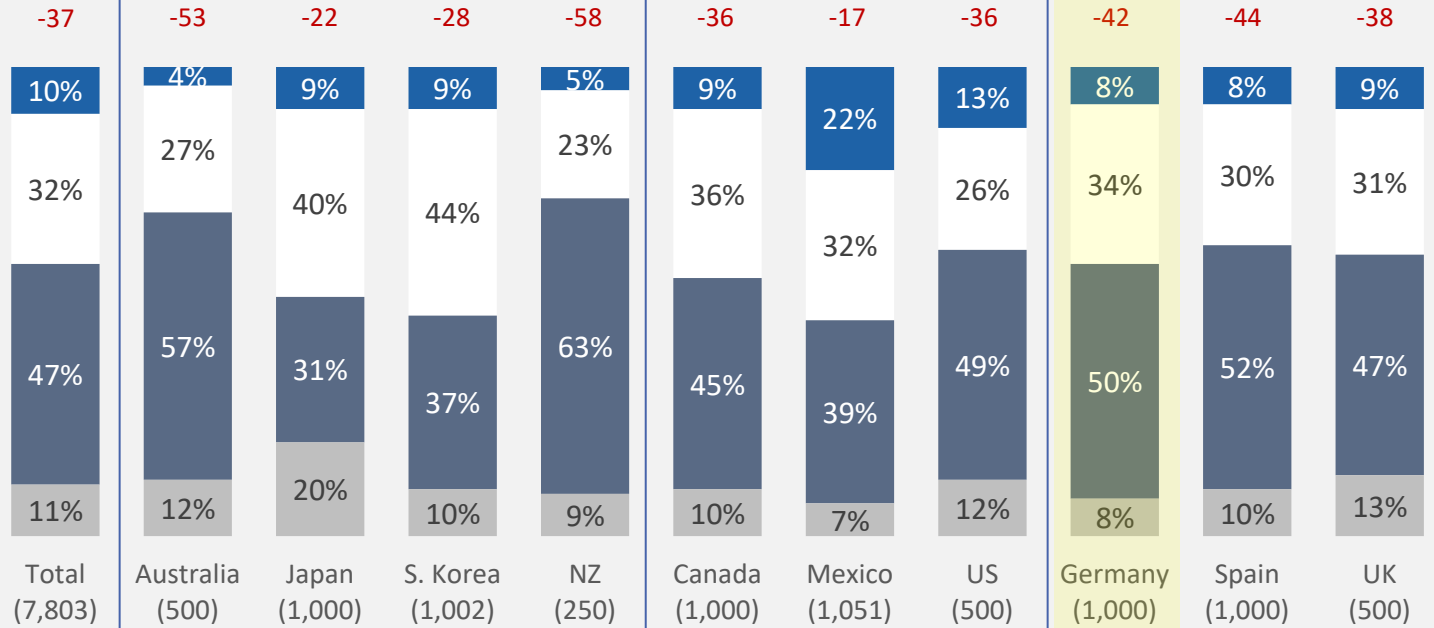
Incorporating AI into market research practices negatively impacts trust in market research companies.



Average Impact on Trust of Market Research Companies Using AI†

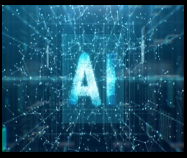
Net Trust Index

- 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

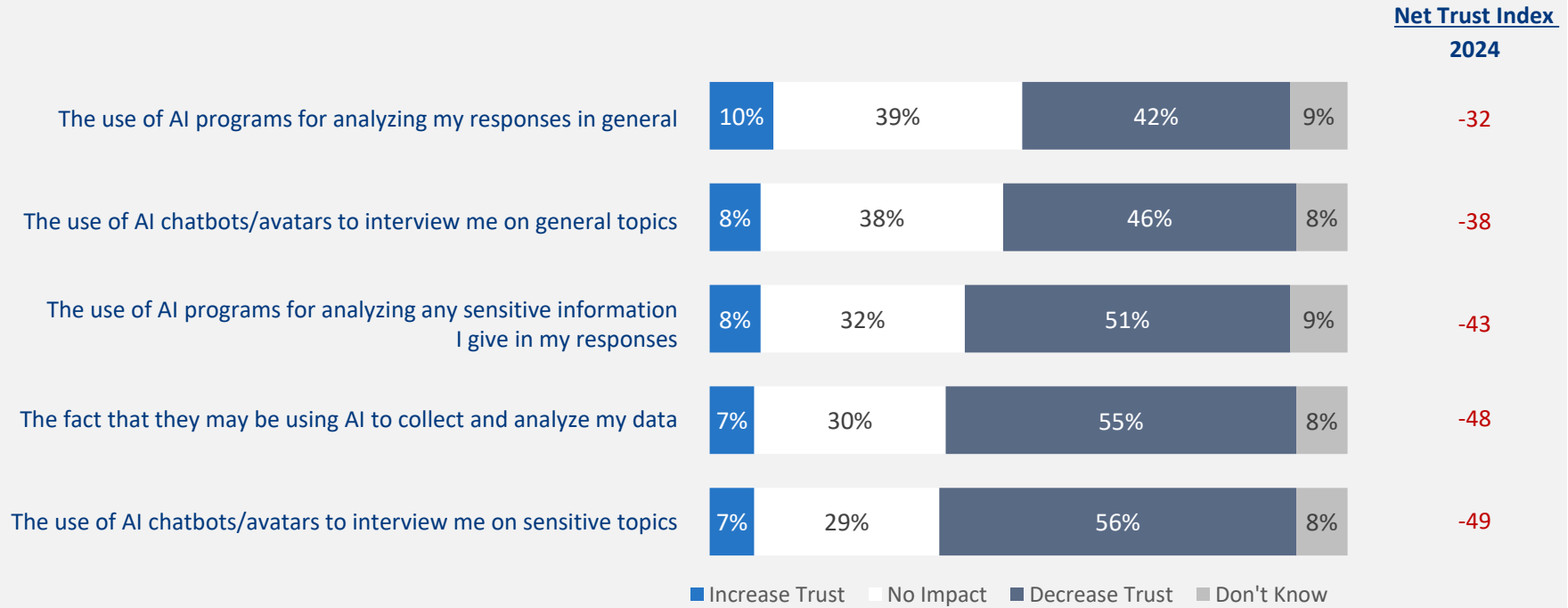


Net trust is negative across all aspects of AI use by market research companies.



Germany

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



Net Trust Index = % Increase Trust – % Decrease Trust

**TREND DATA
2024 VS. 2022**

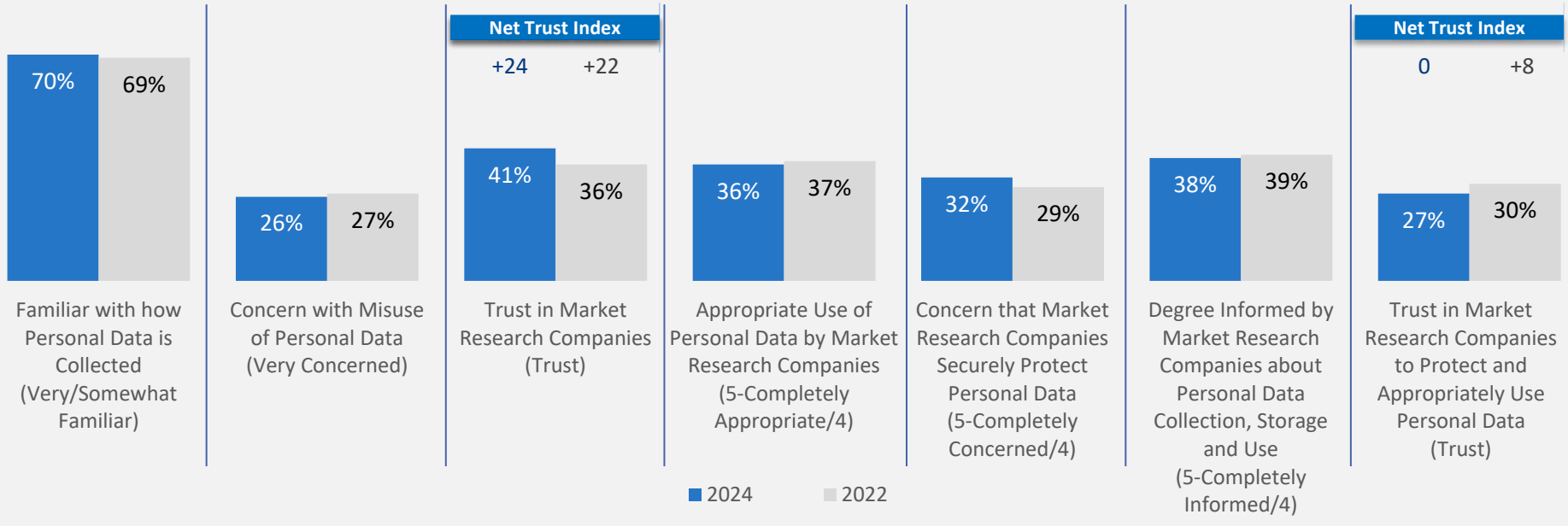




While net trust in market research companies overall is stable vs. 2022, trust in relation to personal data use is lower.



2024 vs. 2022 Comparison



■ 2024 ■ 2022

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

