Global Trust Survey 2024

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

April 2024

Table of Contents

Read Me: I'm Important

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"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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Navigating the AI Surge: Elevating Quality in Market Research

At the forefront of the dynamic market research industry, innovation isn't merely a buzzword but a guiding principle embraced by leading companies. We are witnessing an unprecedented surge in the adoption of Artificial Intelligence (AI) technologies across various sectors, including market research. While the promise of AI is undeniable, it brings with it a pressing need to emphasize quality above all else.

AI has undoubtedly revolutionized how we gather, analyze, and interpret data. From predictive analytics to natural language processing, AI-powered tools have enabled us to extract deeper insights from vast datasets, uncovering trends and patterns that were once elusive. However, as the reliance on AI grows, so too does the importance of ensuring the quality of the insights generated.

In the fast-paced world of market research, there is often a temptation to prioritize speed and efficiency over quality.

Yet, we must resist this temptation and recognize that quality is the cornerstone of meaningful research. AI can undoubtedly accelerate processes, but it is the human touch that ensures the rigor and accuracy of the findings.

One of the key challenges in the age of AI is the need to mitigate biases inherent in both the data and the algorithms themselves. As researchers, we have a responsibility to ensure that AI is used ethically and responsibly, guarding against unintended consequences that could undermine the validity of our research findings. This requires careful scrutiny of both the inputs and outputs of AI systems, as well as ongoing monitoring and refinement to address any biases that may arise.

Furthermore, as the volume and complexity of data continue to grow, so too does the importance of effective data management and governance. Researchers must invest in robust systems and processes to ensure the integrity and security of the data underpinning their research efforts. This includes not only compliance with regulatory requirements but also proactive measures to safeguard against data breaches and unauthorized access.

In conclusion, the rise of AI presents both opportunities and challenges for the market research industry. At InnovateMR, we recognize the need to strike a balance between leveraging AI to drive innovation and maintaining a steadfast commitment to quality. By prioritizing quality in our research methodologies, embracing ethical AI practices, and investing in robust data management, we can ensure that our insights remain accurate, reliable, and actionable in an increasingly AI-driven world.

Amanda Keller-Grill

SVP Global Innovation & Product Strategy at InnovateMR

CREATING TRUST IN GLOBAL RESEARCH

How do you create trust when you don't speak someone's language or understand their culture? When conducting research, trust is key to creating authentic connections with participants – and when working globally, having the right people on your team can make all the difference.

Survey Translation and Localization

Even when working with participants with high levels of English, it's best practice to offer the option of local languages. Translating surveys involves more than converting text from one language to another; it requires localization to adapt content so that it resonates within specific cultural contexts. Surveys should be crafted to appear as if they were originally written for the local market, with familiar language and culturally relevant references. This level of customization encourages greater engagement from respondents, leading to more reliable data. Keep in mind that not all native speakers are good translators, and consider working with a professional translator or agency who understands the required level of linguistic and cultural nuance.

Interviews and Focus Groups

When it comes to conducting interviews or focus groups across different cultures, researchers need to navigate more than language – they need to understand social norms, traditions, and expectations. The ability to connect in participants' native language can make all the difference in creating trust and allowing participants to share their authentic stories. Working with bilingual researchers who understand the language and culture can help ensure seamless interaction with participants respond to cultural cues throughout a discussion.

What about AI?

AI is improving all the time, and it can play an important role in research. It can create a good first draft of your document, and sometimes it does a good transcribing your audio. But the challenge at this point is that you don't know what you don't know. It may translate a question right – but it may not. It may miss what your participant said, or more importantly, what your participant meant. The overall output varies from language to language, so when quality and nuance matters, having a human in the loop is essential.

Language is more than just a method of communication – it's a bridge to deeper understanding and trust. When companies conduct research using the native languages of their target markets, they show respect and empathy. This not only improves the quality of the data collected by encouraging openness among participants, it also enhances the overall engagement with the brand. As you plan your global research, take the time to prioritize language to help ensure that you can get to the most meaningful insights.

JILL KUSHNER BISHOP

MULTILINGUAL CONNECTIONS

Trust in Market Research: A Call for Self-Reflection

As market research professionals, we often scrutinise the trustworthiness of the data we collect. Are consumers providing honest responses? Did they read the question properly? Are they motivated solely by incentives? While we diligently strive to collect accurate and reliable data, it's equally important to redirect our focus inward and confront the uncomfortable questions: Do consumers have trust in us? Have we proven ourselves worthy of that trust? While the overall trust in market research companies remains relatively steady and positive, certain practices including issues surrounding data privacy and scepticism towards AI are concerns that cannot be overlooked.

Trust is the foundation upon which successful market research is built. Without it, our efforts to gather meaningful insights are compromised. Consumers must have confidence that their contributions are valued, their privacy is safeguarded, and their data is managed ethically.

Transparency builds credibility and reassures consumers that their involvement is valued, appreciated, and their data will be handled responsibly. Throughout the research journey, clear and concise communication is essential, including transparent explanations of the research objectives, data collection methods, storage, and usage, as well as any utilization of AI technology and its implications.

In an era marked by increasing concerns about data privacy, safeguarding consumers' data is non-negotiable. Market research firms must adhere to stringent data protection regulations, ethical guidelines and consistent, robust data management processes. Respecting consumers' privacy is not just a legal obligation; it's a moral imperative. Consumers should have complete control over their personal information, with clear consent options. Anonymising data and limiting the collection of sensitive information can help alleviate privacy concerns and foster trust. When explaining the use of AI in, emphasise its role in enhancing efficiency, accuracy, and insights such as how AI algorithms analyse vast amounts of data to uncover patterns and trends, leading to more precise and actionable results. Additionally, emphasize the ethical and transparent use of AI, reassuring consumers that their data privacy is protected, and that AI is employed responsibly to improve research outcomes.

As a collective industry, we need to improve consumer perception on our data privacy practices. Part of this should be an investment in actively improving data literacy. Through dedicated investments in educational initiatives and awareness campaigns, we can enable and empower individuals to understand the importance of their data, comprehend the associated risks of data sharing, and recognise their rights in managing personal information. A well-informed public is better equipped to navigate the complexities of the digital world.

Another crucial aspect of gaining consumer trust is upholding the integrity of our research methodologies. We must strive to design surveys and studies that are fair, unbiased, and relevant to consumers' experiences. By using rigorous methods and avoiding leading questions, manipulative tactics, while also being considerate of their time and effort by offering suitable incentives, we can enhance the credibility of our research and earn trust from consumers. It's important that we actively listen to consumers' concerns and feedback, showcasing our dedication to their welfare. Through transparent and proactive responses to these concerns, we can reassure consumers that their voices matter and their trust is respected.

Ultimately, building trust in market research is a continuous journey that requires dedication, transparency, and integrity. By prioritising consumers' needs and concerns, communicating openly, maintaining ethical standards and ensuring data protection, we can create a culture of trust benefiting all stakeholders. These efforts aim to elevate market research beyond "average" in trustworthiness, ensuring consumers recognise its significance and continue to find it valuable for understanding consumer behaviour and making informed decisions. Providing a positive experience is vital for encouraging ongoing participation and sustaining industry growth.

LISA SALAS

OVATION RESEARCH

Higher Trust = Lower Friction

Trust is not a new concept. Trust is, always has been, and always will be vital to any transaction in any industry. Without trust, business simply cannot be done.

As Stephen M. R. Covey eloquently explained in his 2006 book "The Speed of Trust", with trust comes greater speed and efficiency, reduced transaction costs, increased innovation and creativity, and improved customer loyalty and employee engagement.

GRBN's Global Trust Survey assesses the level of trust associated with our market research industry, and therefore provides an important measure of the efficiency at which we can work. Or said another way, a measure of the friction we are working against. The higher the trust, the lower the friction.

It is heartening to see that market research is more trustworthy than other industries like government (sadly) and social media companies (not surprisingly). At the same time, it is frustrating to see how little we are trusted among the public on an absolute basis (30% trust us).

We've got to do better. Compared to the other industries included in this research, and considering that 43% of respondents are unsure about us (vs. 23% distrust), there is plenty of room for us to run.

For starters, it's clear the greatest concern and mistrust among respondents is how their personal data is handled (or how they perceive it is handled). We must continue to "do the right thing" for our respondents, protecting their personal data, and not using it in any way inconsistent with their expectations, or outside the various industry association codes of standards and ethics.

Next, surely we can improve the way we interact with respondents. We can create more engaging surveys, eliminate long screening questionnaires, ask smarter questions that make sense to consumers, and generally treat our respondents with the respect they deserve.

Lastly, we must be thoughtful and cautious about our use of AI. When AI is incorporated into market research practices, it negatively impacts trust in market research companies (net trust index falls from +7 to -37). Consumers are highly skeptical about the use of AI in market research, including tools as seemingly innocuous as using AI chatbots or avatars in the online interview. To maintain trust, we must tread lightly and intelligently.

Perhaps the most satisfying finding in the entire study is that the personal benefit consumers believe they receive from market research has increased – across every country! Let's ensure we can continue that trend by doing the hard work of building a greater level of trust with our constituents and stakeholders. Above all else, let's be sure not to squander our greatest asset.

David Rothstein

RTi Research

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

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

- Fieldwork was conducted between the 12th and 24th of February 2024.

- The report compares the results for 2024 to the 2022 Global Trust Survey, fieldwork for which was conducted in July 2022. Trended data is shown throughout the report, many times reported as the +/- in percentage point change in the 2024 data vs. 2022 data.

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

- Version 1 asked respondents first about trust with personal data and has been used to report on questions relating to personal data

- Version 2 asked respondents first about overall trust and has been used to report on questions relating to overall trust, as well as the perceived benefit of market research

- Versions 1 and 2 combined were used to report on questions relating to the market research experience

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

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

Background & Sample (Cont'd)

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

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

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

KEY TAKEAWAYS

Key Takeaways

✓ Consumer trust in market research companies remains average relative to other types of organizations. That said, it fares better than data analytics or 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.

✓ While survey length is still a concern, enjoyment is largely favorable and consistent vs. 2022.

✓ There continues to be widespread distrust in how industries, including market research, handle personal data.

   o A lack of knowledge about data privacy practices drives this doubt.

✓ Consumers are highly skeptical of AI use in market research and express great distrust of companies touting its benefits.

   o This is especially true regarding the use of AI chatbots and avatars for online interviews, particularly when dealing with sensitive topics.

Key Changes 2024 vs. 2022

✓ Globally, public trust in organizations declined slightly, except for in the US, which saw a slight uptick.

- o Trust in **market research companies** held relatively steady, except for South Korea, where it took a significant hit.

- o Negative perceptions of **data analytics companies** persist worldwide, with the greatest declines in South Korea and the UK.

- o Trust in **election & polling companies** declined in South Korea but edged slightly higher in Australia, Japan and the US.

✓ Across all countries, consumers perceived a greater personal benefit from market research, most notably in Japan.

- o 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.

- o 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 a net positive, but data privacy practices continue to be a growing concern.

Overall Trust of Market Research Companies

43%

30%

+7
(Net Trust Index)

No Change
(vs. 2022)

23%

4%

- Trust
- Not Sure
- Do Not Trust
- Don't know
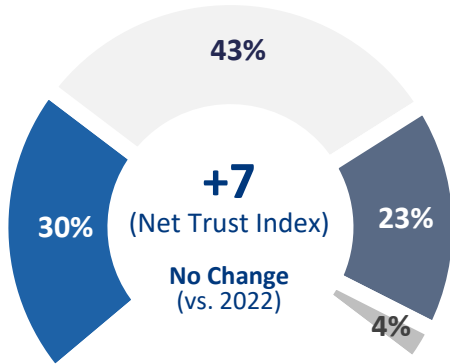
Trust of Market Research Companies to Protect & Appropriately Use Personal Data

40%

17%

-22
(Net Trust Index)

-4
(vs. 2022)

39%

4%
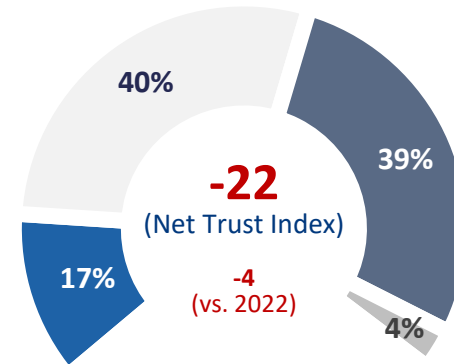
Net Trust Index = % Trust – % Do Not Trust

Overall Trust Net Trust Index (NTI): Across the 15 industries/organizations analyzed, the average NTI was +6 (Market Research companies ranked 8th of 15)
Personal Data Trust Net Trust Index (NTI): Across the 15 industries/organizations analyzed, the average NTI was -14 (Market Research companies ranked 10th of 15)

Base: Version 1 Respondents (3,506)
Base: Version 2 Respondents (3,505)

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

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Overall Trust of Market Research Companies – Net Trust Index

The Health authorities (Ranked 1st of 15) — +37

Market Research companies (Ranked 8th of 15) +7

Average: +6

-31 Social media companies such as Facebook and Twitter (Ranked 15th of 15)
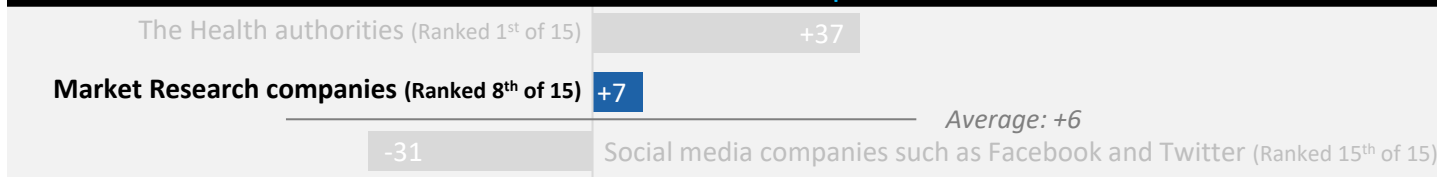
Trust of Market Research Companies Use of Personal Data – Net Trust Index

Banks or other financial institutions (Ranked 1st of 15) +27

Average: -14

-22 **Market Research companies (Ranked 10th of 15)**

-50 Social media companies such as Facebook and Twitter (Ranked 15th of 15)
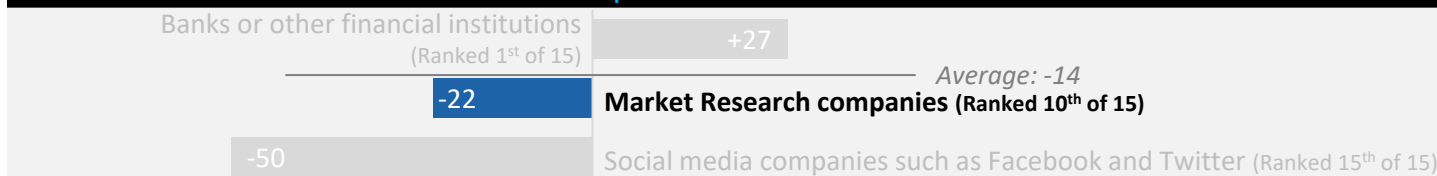
These findings, based on the average across comparable countries surveyed, hide significant differences by country. Read on to find out more.

Net Trust Index = % Trust – % Do Not Trust

24%

(-2% vs. 2022)

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

43%

(-2% vs. 2022)

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

24%

(-2% vs. 2022)

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

46%

(+6 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 (3,506)
Base: Version 2 Respondents (3,505)

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.
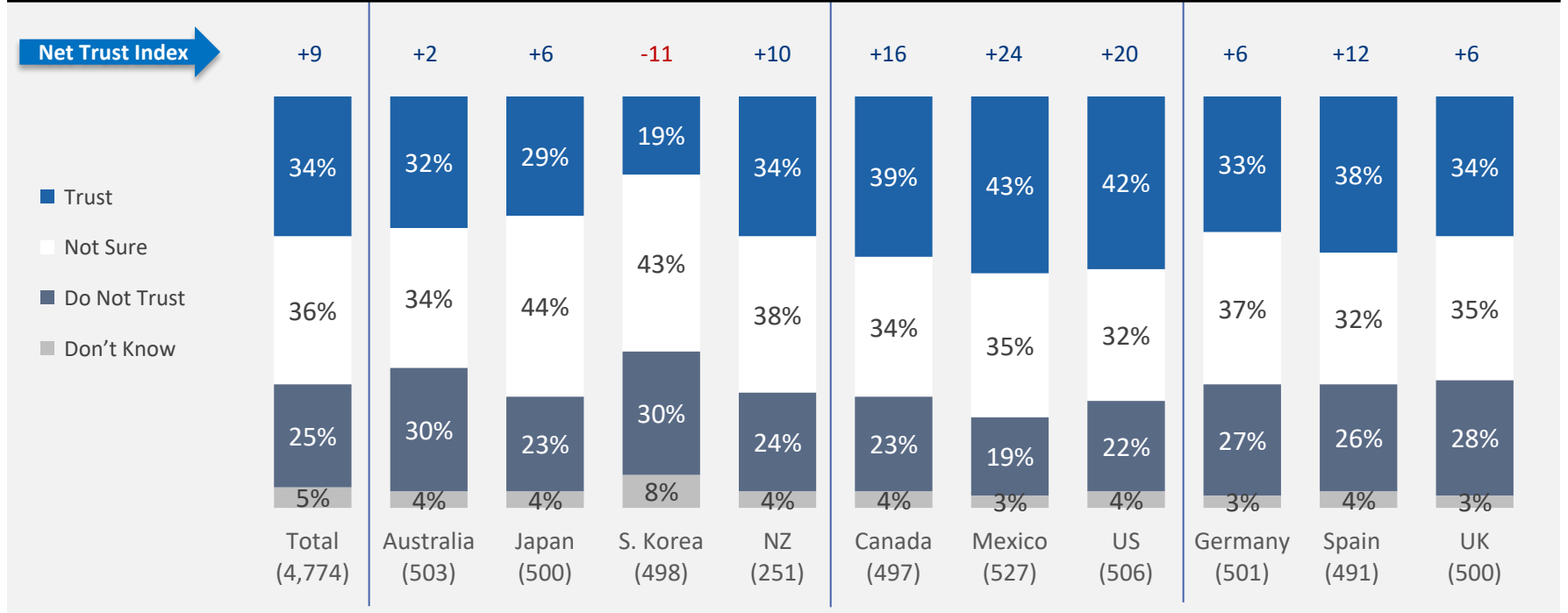
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Average Level of Trust Across Organizations/Professionals†

Net Trust Index

	Total (4,774)	Australia (503)	Japan (500)	S. Korea (498)	NZ (251)	Canada (497)	Mexico (527)	US (506)	Germany (501)	Spain (491)	UK (500)
Net Trust Index	+9	+2	+6	-11	+10	+16	+24	+20	+6	+12	+6
Trust	34%	32%	29%	19%	34%	39%	43%	42%	33%	38%	34%
Not Sure	36%	34%	44%	43%	38%	34%	35%	32%	37%	32%	35%
Do Not Trust	25%	30%	23%	30%	24%	23%	19%	22%	27%	26%	28%
Don't Know	5%	4%	4%	8%	4%	4%	3%	4%	3%	4%	3%

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

Net Trust Index = % Trust – % Do Not Trust   *†Scores are an average across the 15 industries/organizations analyzed*

Across countries, trust in organizations dipped slightly on a net basis, except in the US, which sees a modest increase.

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

Consumers once again place the most trust in health, law enforcement, finance, retail, and online stores. Market research companies rank in the middle, while media, social media and companies providing AI tools incur the most doubt.

Levels of trust across industries is consistent vs. 2022, except for government, which declined.

Level of Trust by Organizations/Professionals

Organization/Professional	Trust	Not sure	Do Not Trust	Don't Know	Net Trust Index 2024	Net Trust Index 2022	% Highest	% Lowest
The Health authorities	52%	30%	15%	3%	+37	+37	Canada	S. Korea
Your local police	53%	26%	17%	4%	+36	+37	Germany	S. Korea
Banks or other financial institutions	49%	29%	19%	3%	+30	+29	US, Japan	S. Korea
Retailers with loyalty card programs	44%	38%	15%	3%	+29	+29	US	S. Korea
Online stores	40%	42%	14%	4%	+26	+25	US	S. Korea
Companies that provide internet search engines	37%	38%	21%	4%	+16	+13		
Mobile phone operators	35%	39%	23%	3%	+12	+12		
Market research companies	30%	43%	23%	4%	**+7**	**+7**		
Data analytics companies	23%	47%	23%	7%	0	+2		
Election & Opinion Polling companies	26%	39%	31%	4%	-5	-5		
Secret service organizations	21%	41%	30%	8%	-9	-7		
The government	26%	29%	41%	4%	-15	-4		
Companies providing AI tools (i.e., ChatGPT, Bard)	17%	41%	36%	6%	-19	NA		
Media companies	18%	39%	40%	3%	-22	-23		
Social media companies	16%	34%	47%	3%	-31	-31		

■ Trust ☐ Not sure ■ Do Not Trust ■ Don't Know

Net Trust Index = % Trust – % Do Not Trust
Data is based on comparable countries across waves.

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Market research companies continue to command the most trust across the "insights space."
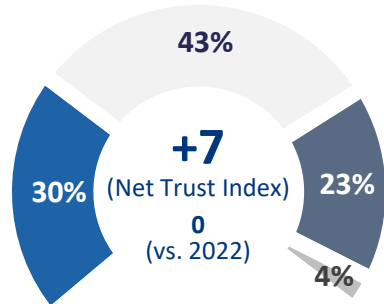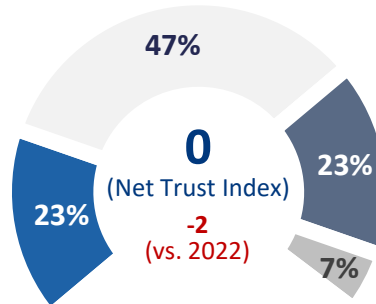
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Trust in Market Research

43%

+7
(Net Trust Index)
0
(vs. 2022)

30%   23%

4%

Trust in Data Analytics

47%

0
(Net Trust Index)
-2
(vs. 2022)

23%   23%

7%

Trust in Election & Opinion Polling

39%

-5
(Net Trust Index)
0
(vs. 2022)

26%   31%

4%
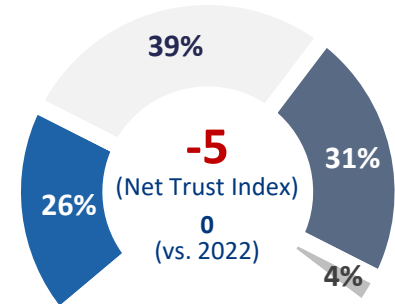
■ Trust
■ Not Sure
■ Do Not Trust
■ Don't know

Net Trust Index = % Trust – % Do Not Trust
Data is based on comparable countries across waves.

Trust in market research companies varies greatly by country but leans positive overall. While cultural bias likely plays a role in this variation, on a net basis, Mexico stands out as the most trusting nation, while South Korea and Japan exhibit the most skepticism.

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Trust in Market Research

	Total	Australia	Japan	S. Korea	NZ	Canada	Mexico	US	Germany	Spain	UK
Net Trust Index	+12	+4	-8	-26	+11	+21	+41	+24	+24	+21	+9
Trust	33%	29%	18%	11%	29%	39%	51%	39%	41%	40%	31%
Not Sure	42%	42%	52%	44%	49%	40%	35%	42%	40%	37%	44%
Do Not Trust	21%	25%	26%	37%	18%	18%	10%	15%	17%	19%	22%
Don't Know	4%	4%	4%	8%	4%	3%	4%	4%	2%	4%	3%
	Total (4,774)	Australia (503)	Japan (500)	S. Korea (498)	NZ (251)	Canada (497)	Mexico (527)	US (506)	Germany (501)	Spain (491)	UK (500)

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

Net Trust Index = % Trust – % Do Not Trust

Trust in market research is fairly stable vs. 2022, except for South Korea, where trust has substantially deteriorated.

Trust in Market Research - Trended to 2022

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

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

Trust in Market Research (vs. Country Average)

	Net Trust Index	Rank
Total	+9% +12%	8 of 15
Australia	+2% +4%	7 of 15
Japan	-8% +6%	9 of 15
S. Korea	-26% -11%	13 of 15
NZ	+10% +11%	7 of 15
Canada	+16% +21%	7 of 15
Mexico	+24% +41%	4 of 15
US	+20% +24%	8 of 15
Germany	+6% +24%	4 of 15
Spain	+12% +21%	6 of 15
UK	+6% +9%	8 of 15

Net Trust Index ■ Country Average ■ Market Research Companies
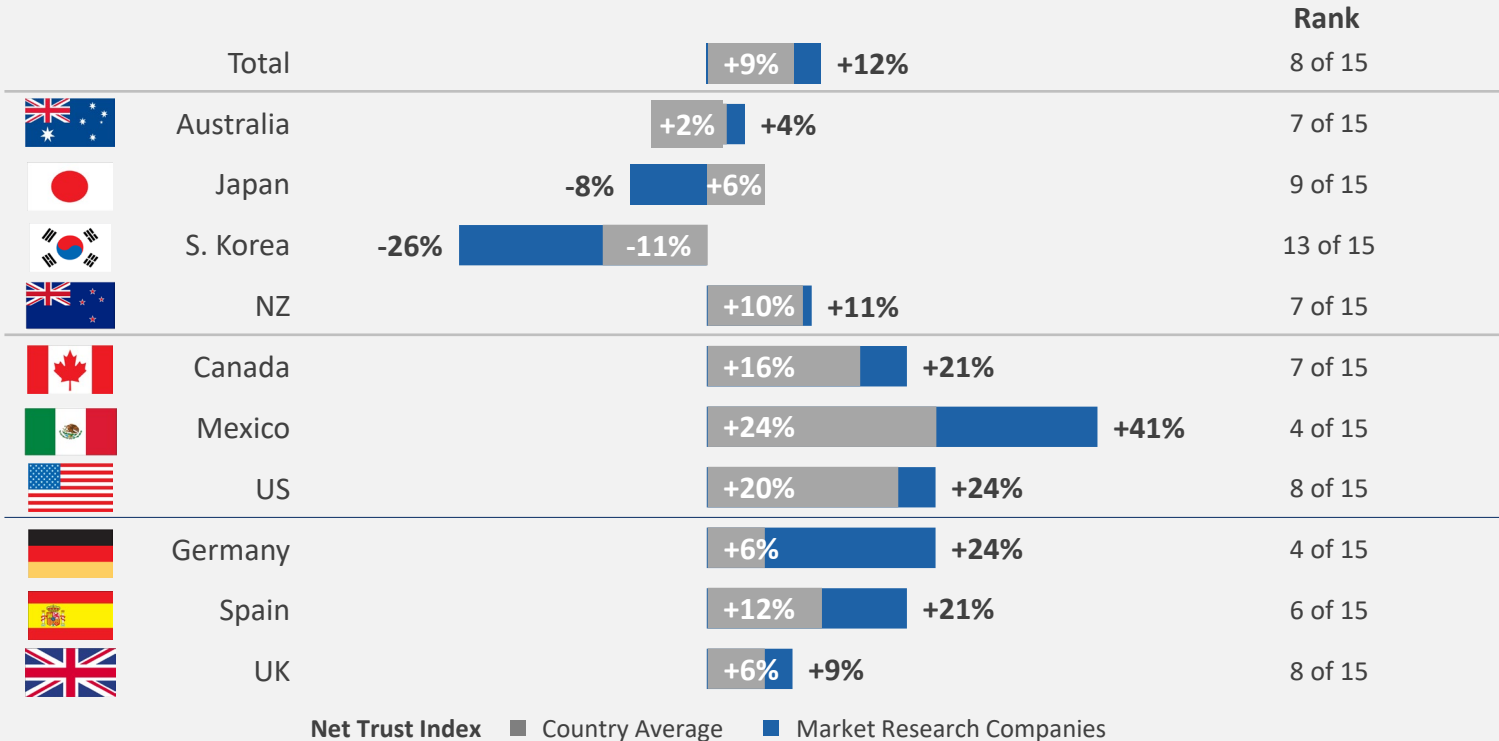
Net Trust Index = % Trust – % Do Not Trust

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

	Total	Australia	Japan	S. Korea	NZ	Canada	Mexico	US	Germany	Spain	UK
Net Trust Index	+4	-7	-9	-8	+1	+19	+28	+14	-3	+13	-8
Trust	26%	20%	11%	20%	22%	35%	41%	32%	23%	34%	21%
Not Sure	46%	47%	59%	43%	53%	43%	43%	44%	46%	40%	44%
Do Not Trust	22%	27%	20%	28%	21%	16%	13%	18%	26%	21%	29%
Don't Know	6%	6%	10%	9%	4%	6%	3%	6%	5%	5%	6%
	Total (4,774)	Australia (503)	Japan (500)	S. Korea (498)	NZ (251)	Canada (497)	Mexico (527)	US (506)	Germany (501)	Spain (491)	UK (500)

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

Net Trust Index = % Trust – % Do Not Trust

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Net perceptions for trust in data analytics declined in both South Korea and the UK. Though still a net 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 & polling is strongest in Mexico and Germany but weakest in South Korea, Japan and Australia.

Trust in Election & Opinion Polling

Net Trust Index	-2	-11	-15	-35	0	+2	+19	0	+14	+8	+6
Trust	28%	25%	17%	9%	27%	29%	41%	33%	36%	35%	31%
Not Sure	39%	35%	47%	40%	42%	41%	35%	31%	39%	35%	41%
Do Not Trust	30%	36%	32%	44%	27%	27%	22%	33%	22%	27%	25%
Don't Know	3%	4%	4%	7%	4%	3%	2%	3%	3%	3%	3%
	Total (4,774)	Australia (503)	Japan (500)	S. Korea (498)	NZ (251)	Canada (497)	Mexico (527)	US (506)	Germany (501)	Spain (491)	UK (500)
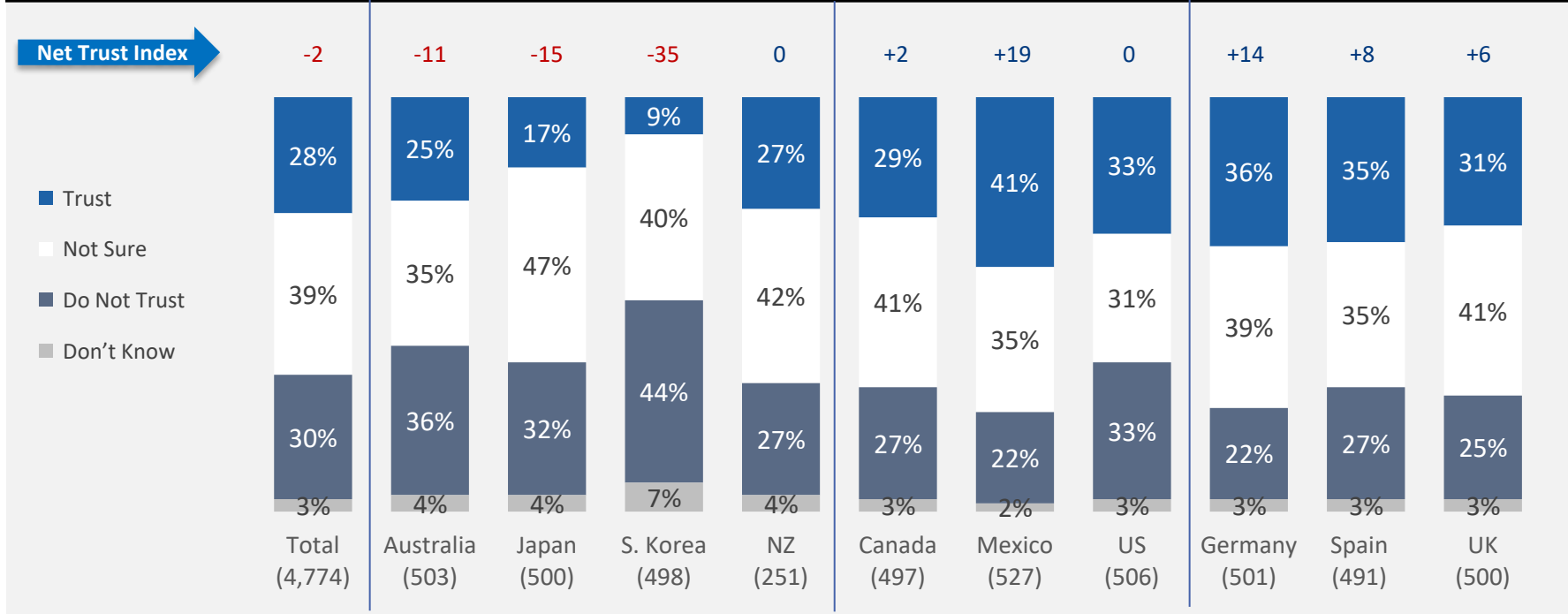
Net Trust Index = % Trust – % Do Not Trust

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

Trust in Election & Opinion Polling - Trended to 2022

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

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

BELIEVABILITY THAT
MARKET RESEARCH
IS BENEFICIAL

The value of market research is more apparent for businesses than for individuals.

Extent Market Research is Perceived to be Beneficial

Top 2 Box

	Yourself	Consumers	Business	Citizens
Top 2 Box	47%	54%	67%	48%

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

Yourself:
- 19%
- 28%
- 32%
- 10%
- 6%
- 5%

Consumers:
- 21%
- 34%
- 30%
- 8%
- 3%
- 5%

Business:
- 34%
- 33%
- 22%
- 4%
- 2%
- 5%

Citizens:
- 18%
- 30%
- 34%
- 9%
- 4%
- 6%
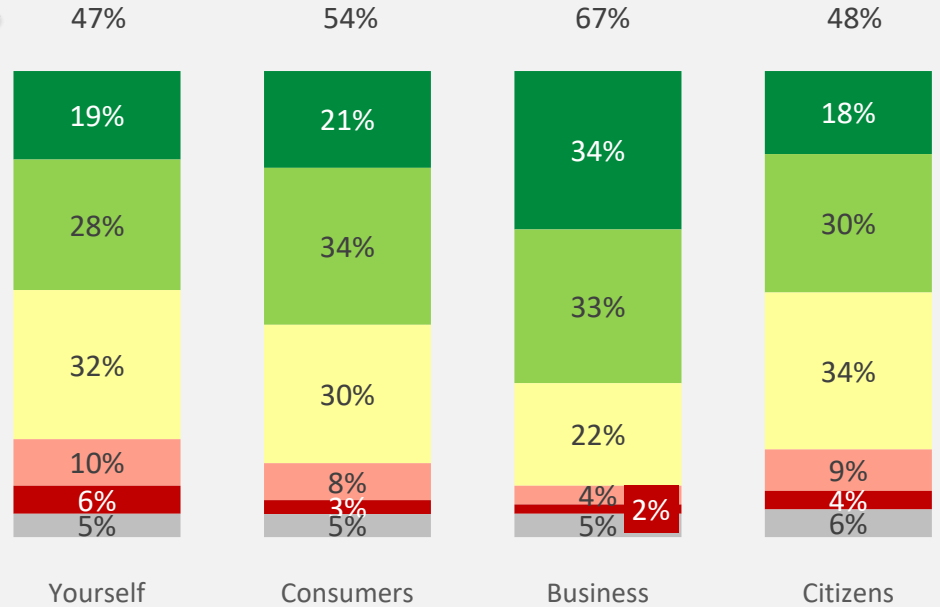
Overall, less than half feel that market research benefits them – this negative sentiment is driven by those in Australia, Japan, New Zealand, and the UK.

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Extent Market Research is Perceived to be Beneficial to Yourself

Top 2 Box

	Total	Australia	Japan	S. Korea	NZ	Canada	Mexico	US	Germany	Spain	UK
Top 2 Box	47%	39%	29%	50%	27%	53%	71%	56%	59%	51%	35%
5 – Benefits completely	19%	12%	5%	11%	9%	21%	43%	29%	26%	21%	9%
4	28%	27%	23%	39%	18%	32%	27%	27%	33%	30%	26%
3	32%	38%	39%	38%	42%	27%	17%	22%	27%	30%	38%
2	10%	12%	13%	6%	16%	11%	5%	10%	8%	9%	15%
1 – Does not benefit at all	6%	8%	8%	1%	10%	6%	4%	6%	3%	5%	6%
Don't Know	5%	4%	11%	5%	5%	4%	4%	6%	3%	6%	7%
	Total (4,774)	Australia (503)	Japan (500)	S. Korea (498)	NZ (251)	Canada (497)	Mexico (527)	US (506)	Germany (501)	Spain (491)	UK (500)

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

The perceived benefit of market research to oneself improved globally vs. 2022, most notably in Japan.

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

■ 2024 ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	46%	39%	29%	50%	53%	56%	59%	35%
2022	40%	34%	18%	45%	49%	50%	54%	30%
(2024)	(3,505)	(503)	(500)	(498)	(497)	(506)	(501)	(500)
(2022)	(3,534)	(504)	(500)	(501)	(494)	(503)	(502)	(530)
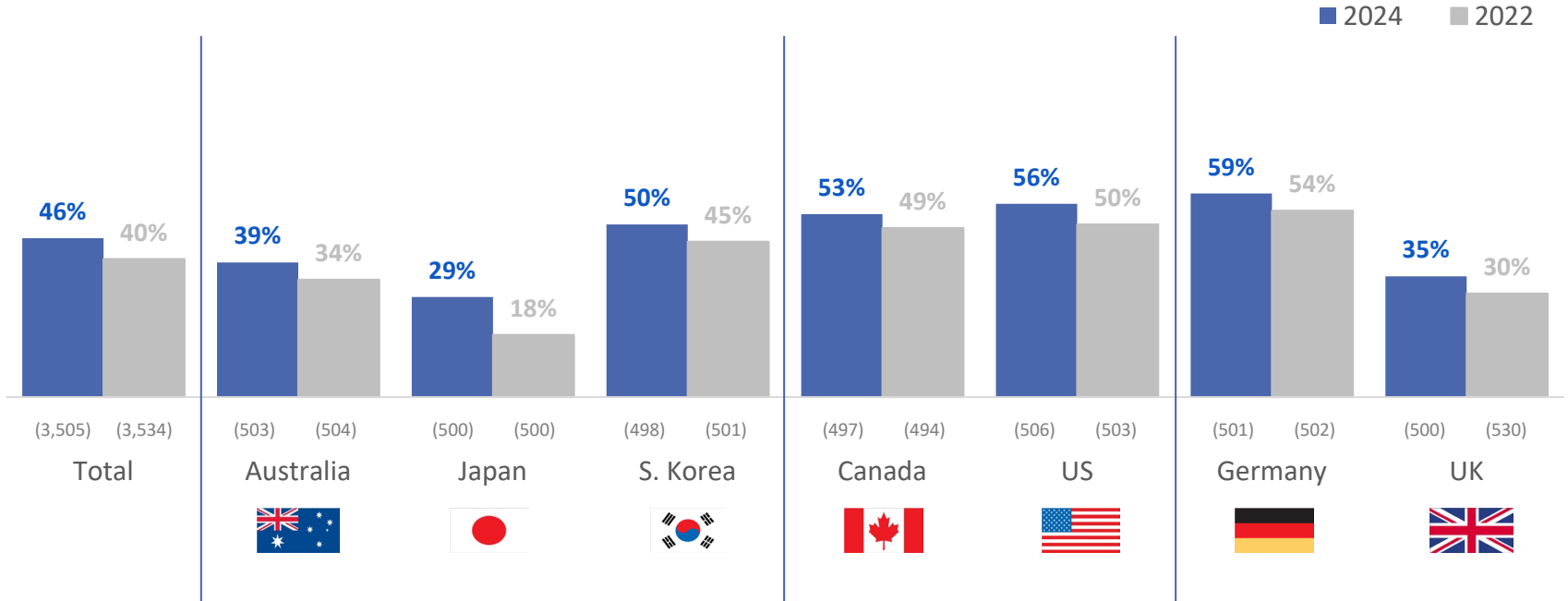
Most recognize some benefit of market research to consumers, especially those in Mexico.

Extent Market Research is Perceived to be Beneficial to Consumers

Top 2 Box

	Total (4,774)	Australia (503)	Japan (500)	S. Korea (498)	NZ (251)	Canada (497)	Mexico (527)	US (506)	Germany (501)	Spain (491)	UK (500)
Top 2 Box	54%	50%	40%	55%	44%	58%	75%	56%	66%	59%	41%
5 – Benefits completely	21%	14%	10%	11%	12%	23%	48%	27%	29%	23%	10%
4	34%	36%	30%	44%	31%	35%	27%	30%	37%	36%	31%
3	30%	33%	39%	35%	39%	28%	15%	28%	24%	25%	37%
2	8%	9%	8%	5%	8%	8%	5%	8%	6%	7%	14%
1 – Does not benefit at all	3%	3%	4%	1%	4%	2%	3%	3%	2%	4%	3%
Don't Know	5%	5%	9%	4%	6%	3%	2%	5%	3%	5%	6%

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

Legend: ■ 2024 ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	52%	50%	40%	55%	58%	56%	66%	41%
2022	48%	47%	29%	53%	57%	55%	58%	40%
(n 2024)	(3,505)	(503)	(500)	(498)	(497)	(506)	(501)	(500)
(n 2022)	(3,534)	(504)	(500)	(501)	(494)	(503)	(502)	(530)
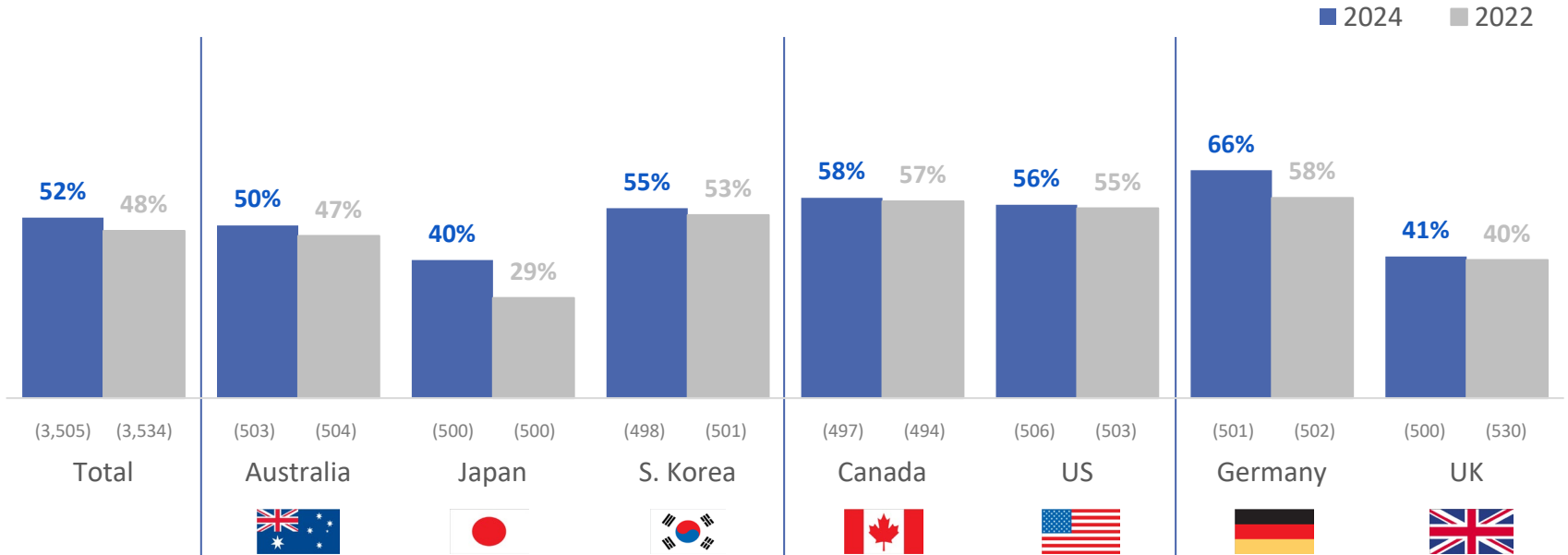
Many consider market research highly beneficial to businesses, especially those in Mexico and Germany.

Extent Market Research is Perceived to be Beneficial to Business
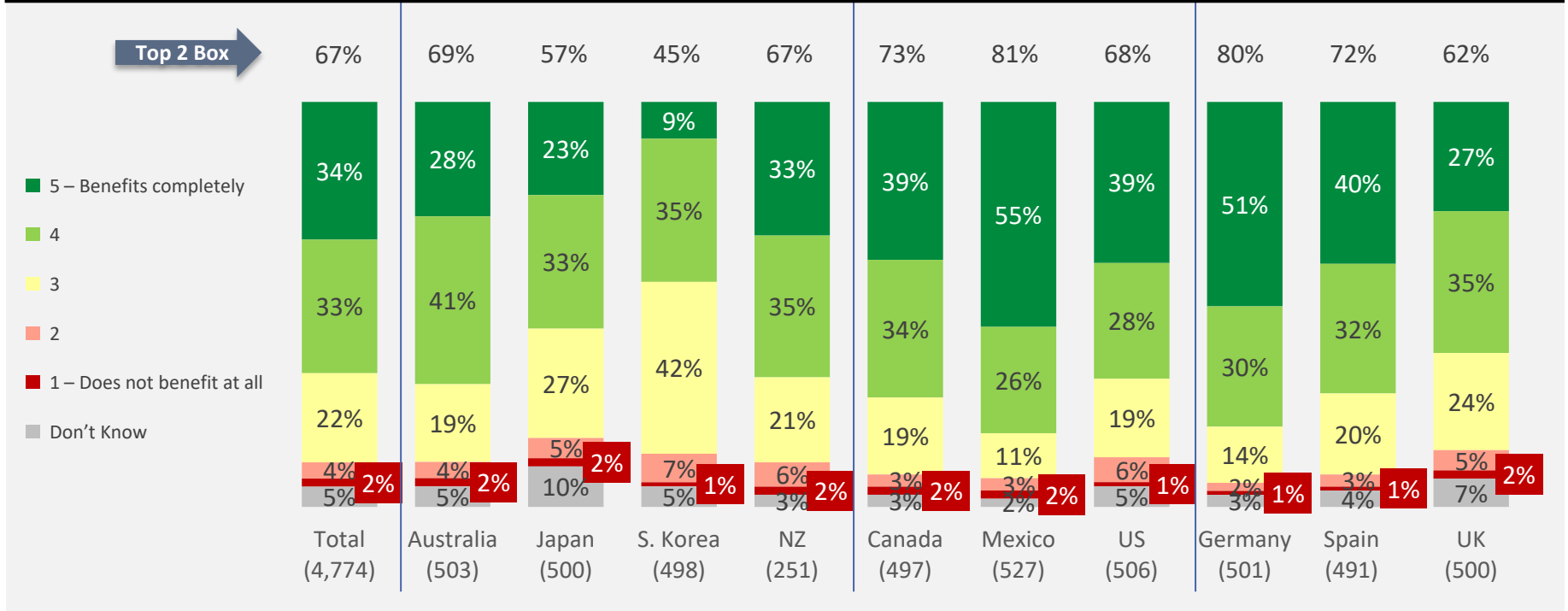
Top 2 Box

	Total	Australia	Japan	S. Korea	NZ	Canada	Mexico	US	Germany	Spain	UK
Top 2 Box	67%	69%	57%	45%	67%	73%	81%	68%	80%	72%	62%
5 – Benefits completely	34%	28%	23%	9%	33%	39%	55%	39%	51%	40%	27%
4	33%	41%	33%	35%	35%	34%	26%	28%	30%	32%	35%
3	22%	19%	27%	42%	21%	19%	11%	19%	14%	20%	24%
2	4%	4%	5%	7%	6%	3%	3%	6%	2%	3%	5%
1 – Does not benefit at all	2%	2%	2%	1%	2%	2%	2%	1%	1%	1%	2%
Don't Know	5%	5%	10%	5%	3%	3%	2%	5%	3%	4%	7%

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

Totals:
- Total (4,774)
- Australia (503)
- Japan (500)
- S. Korea (498)
- NZ (251)
- Canada (497)
- Mexico (527)
- US (506)
- Germany (501)
- Spain (491)
- UK (500)

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

■ 2024 ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	65%	69%	57%	45%	73%	68%	80%	62%
2022	65%	71%	53%	50%	76%	67%	79%	60%
(n) 2024	(3,505)	(503)	(500)	(498)	(497)	(506)	(501)	(500)
(n) 2022	(3,534)	(504)	(500)	(501)	(494)	(503)	(502)	(530)

Data is based on comparable countries across waves.
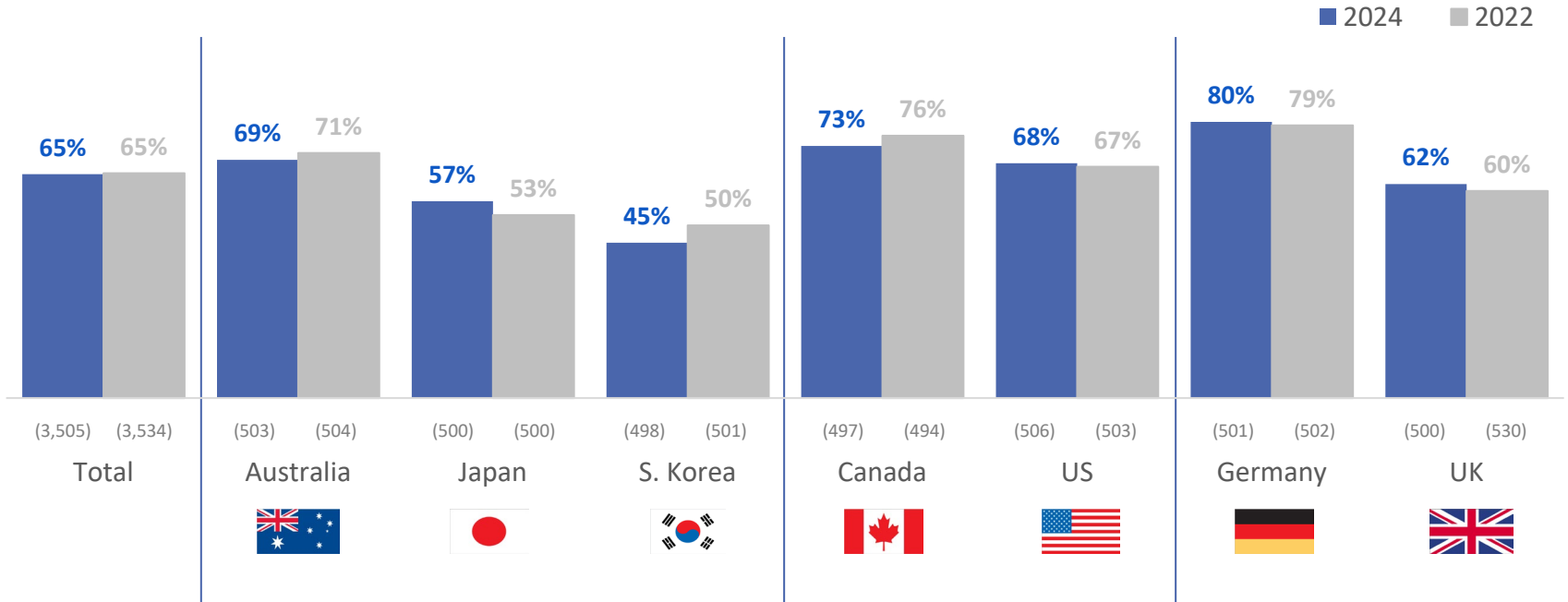
Nearly half recognize the benefits of market research to citizens, with Mexico showing the most conviction, while Japan, New Zealand, and the UK exhibit the least.

Extent Market Research is Perceived to be Beneficial to Citizens

Top 2 Box

	Total (4,774)	Australia (503)	Japan (500)	S. Korea (498)	NZ (251)	Canada (497)	Mexico (527)	US (506)	Germany (501)	Spain (491)	UK (500)
Top 2 Box	48%	43%	33%	47%	37%	57%	72%	48%	56%	49%	36%
5 – Benefits completely	18%	12%	7%	10%	10%	21%	40%	24%	23%	23%	8%
4	30%	30%	26%	37%	27%	36%	31%	24%	33%	26%	28%
3	34%	36%	40%	40%	42%	31%	17%	32%	29%	36%	40%
2	9%	10%	10%	6%	11%	7%	5%	10%	9%	7%	13%
1 – Does not benefit at all	4%	5%	6%	1%	6%	2%	3%	4%	2%	4%	4%
Don't Know	6%	6%	11%	5%	5%	4%	3%	6%	4%	5%	7%

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

■ 2024 ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	46%	43%	33%	47%	57%	48%	56%	36%
2022	41%	35%	21%	48%	51%	48%	51%	35%
(n) 2024	(3,505)	(503)	(500)	(498)	(497)	(506)	(501)	(500)
(n) 2022	(3,534)	(504)	(500)	(501)	(494)	(503)	(502)	(530)
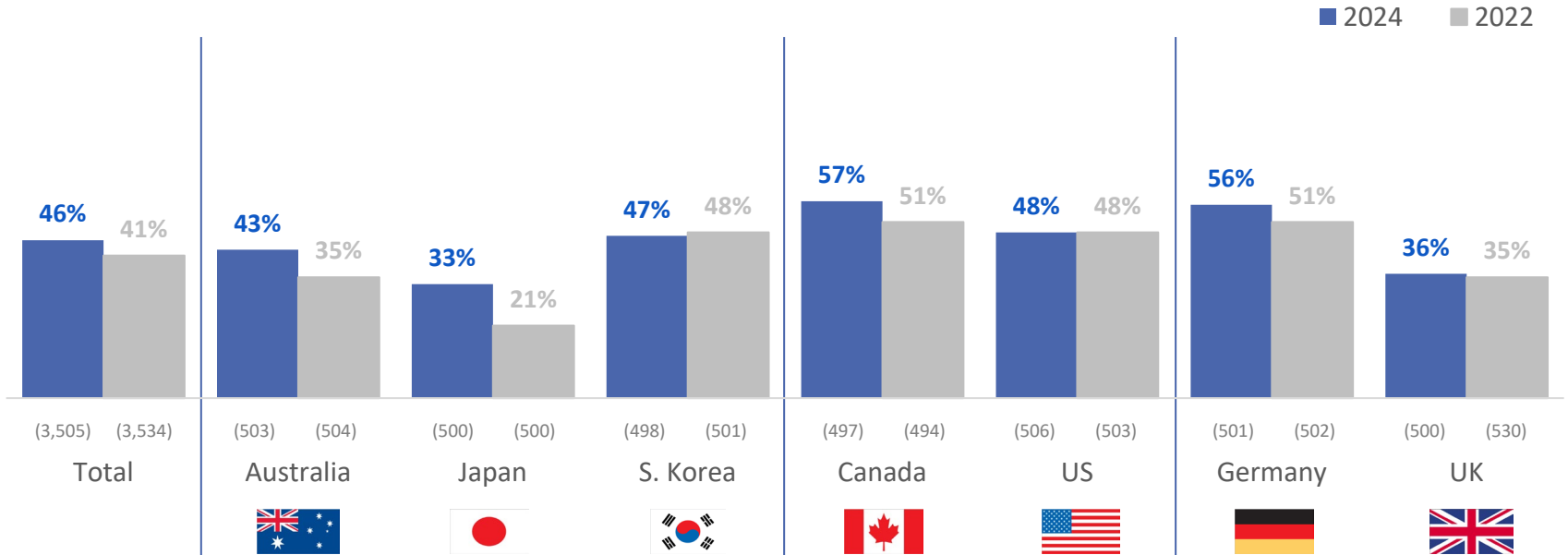
Outside of South Korea, market research is deemed more beneficial to businesses vs. consumers.

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

Consumers ■ Business

	Total (4,774)	Australia (503)	Japan (500)	S. Korea (498)	NZ (251)	Canada (497)	Mexico (527)	US (506)	Germany (501)	Spain (491)	UK (500)
Consumers	54%	50%	40%	55%	44%	58%	75%	56%	66%	59%	41%
Business	67%	69%	57%	45%	67%	73%	81%	68%	80%	72%	62%
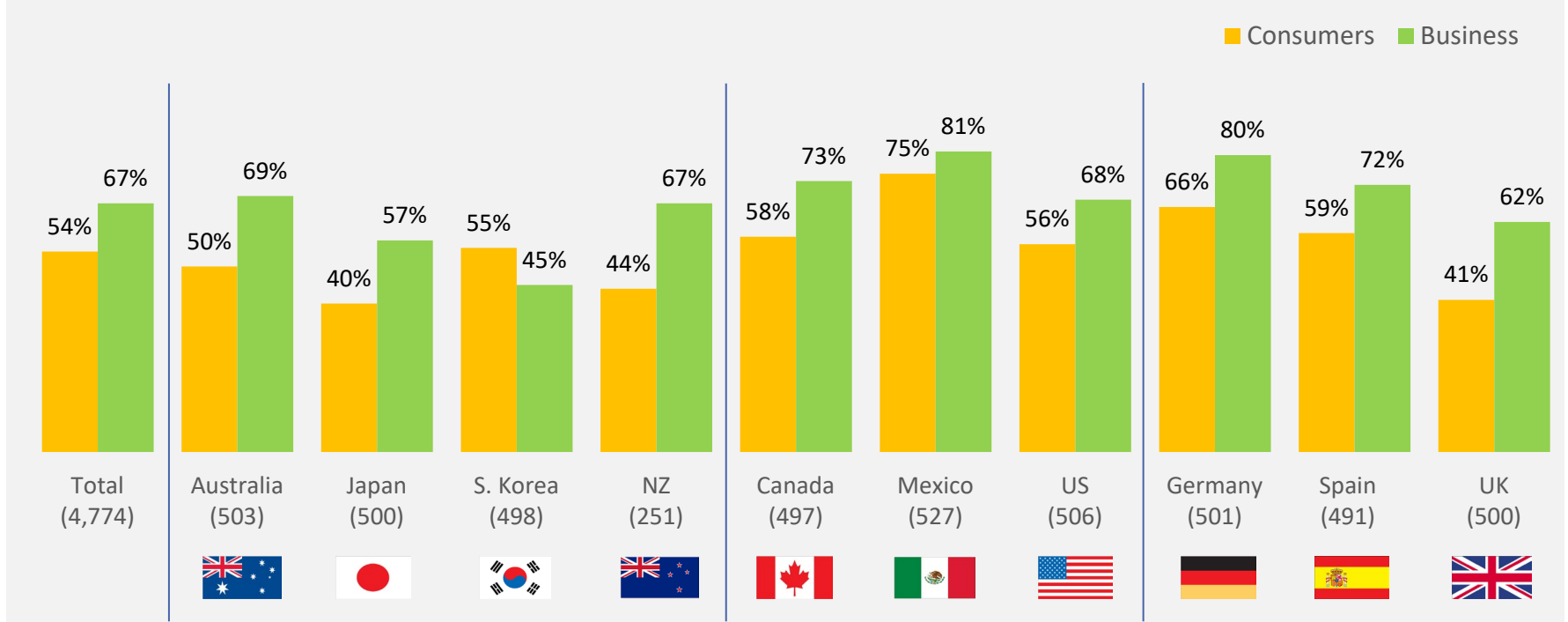
Likewise, market research is considered much more beneficial to businesses than to citizens, except in South Korea, where it's deemed as valuable.

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

Legend: Citizens (pink), Business (green)

Country	Citizens	Business
Total (4,774)	48%	67%
Australia (503)	43%	69%
Japan (500)	33%	57%
S. Korea (498)	47%	45%
NZ (251)	37%	67%
Canada (497)	57%	73%
Mexico (527)	72%	81%
US (506)	48%	68%
Germany (501)	56%	80%
Spain (491)	49%	72%
UK (500)	36%	62%
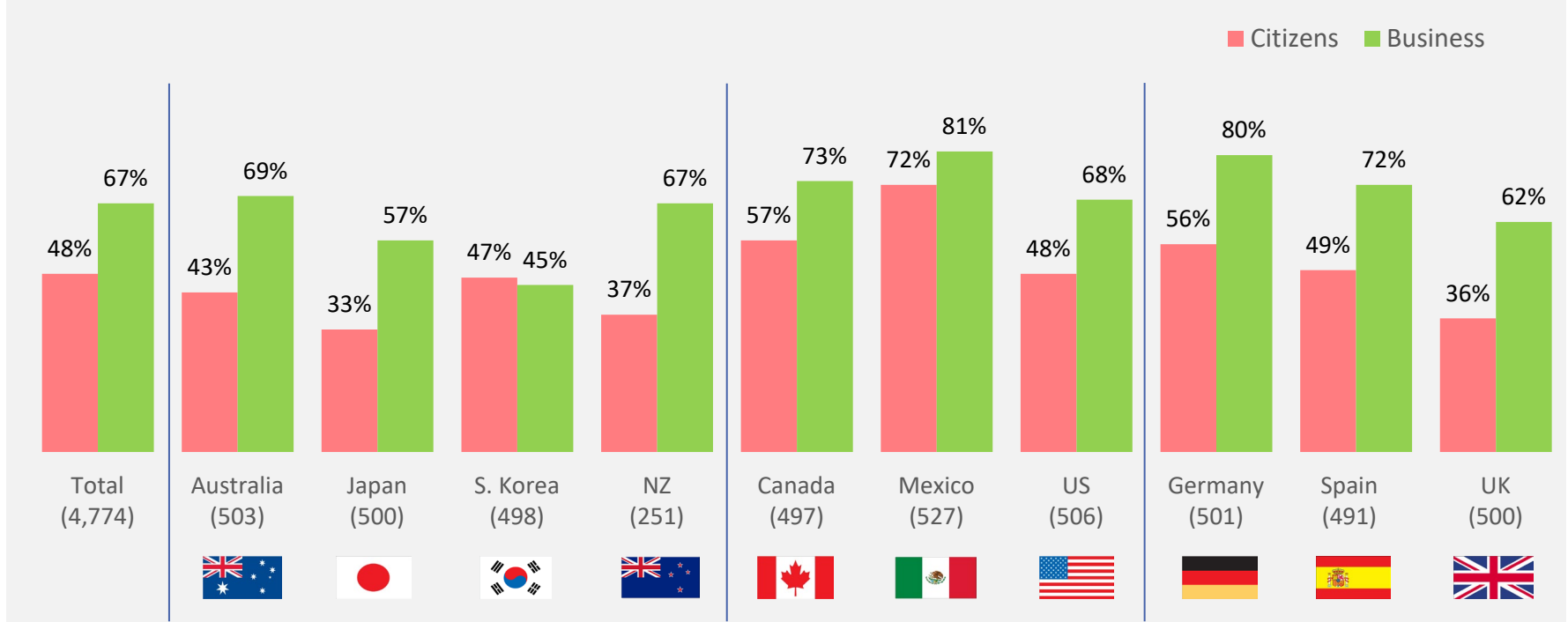
REACTIONS TO THE PARTICIPANT EXPERIENCE
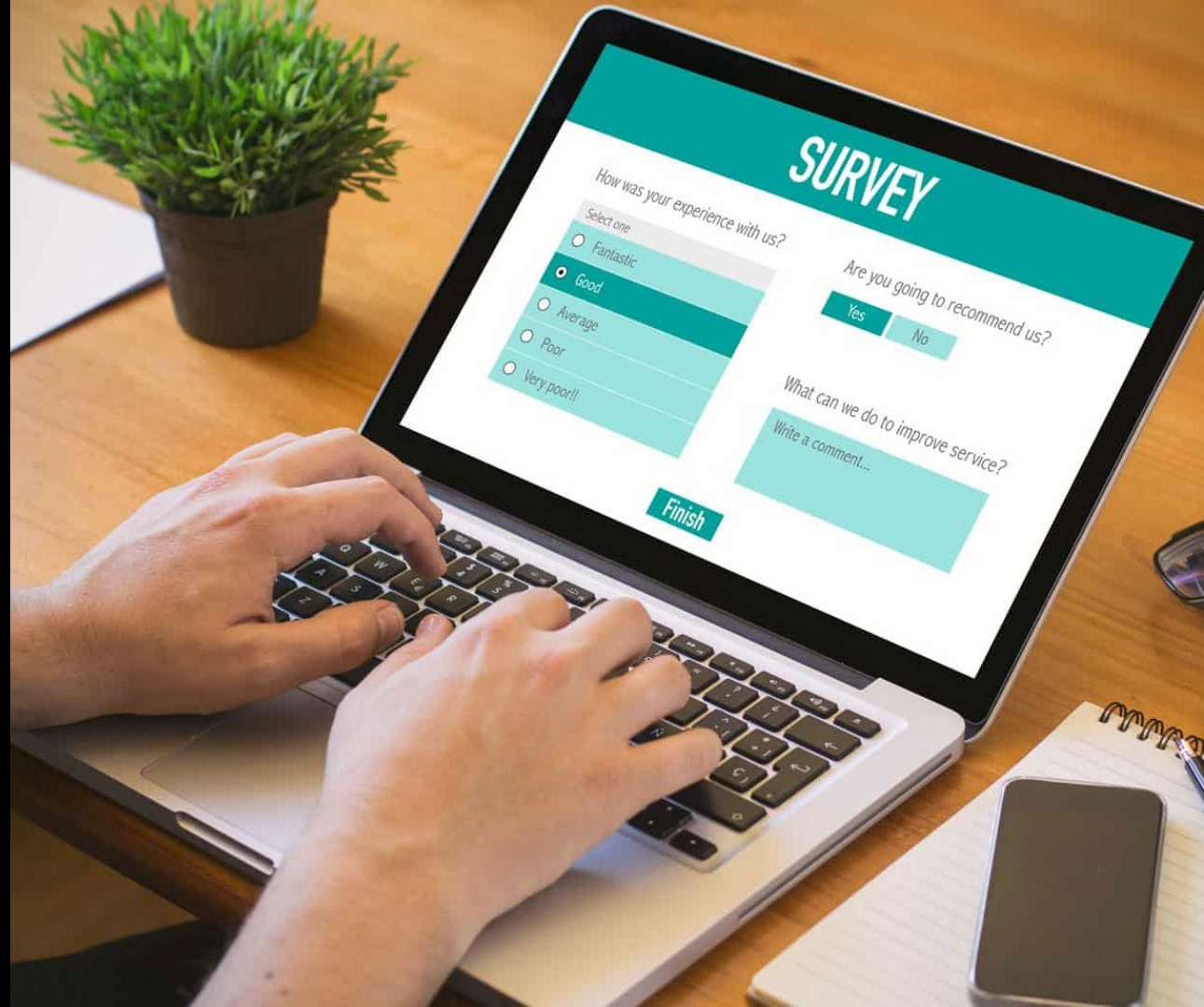
While survey length is generally considered acceptable, there's a sizeable portion, especially in South Korea and Canada, who would appreciate shorter surveys.

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Perception of Survey Length

Country	Too long	Just right	Too short	Don't know
Total (8,727)	40%	52%	5%	3%
Australia (965)	38%	58%	3%	2%
Japan (812)	44%	48%	4%	5%
S. Korea (722)	50%	42%	4%	4%
NZ (461)	30%	62%	3%	4%
Canada (982)	48%	48%	3%	1%
Mexico (935)	36%	46%	16%	2%
US (940)	42%	46%	7%	4%
Germany (970)	37%	56%	5%	2%
Spain (956)	41%	53%	5%	1%
UK (984)	31%	64%	3%	3%

■ Too long   ■ Just right   ■ Too short   ■ Don't know
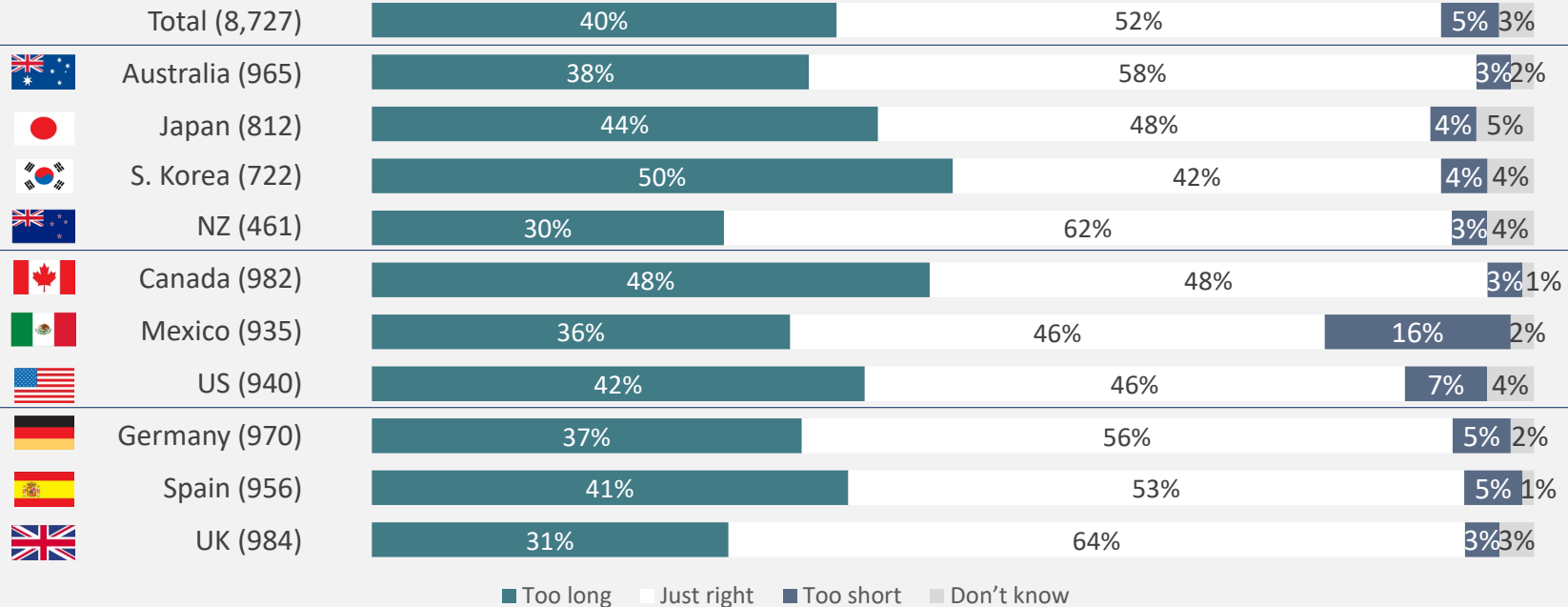
Survey length concerns are largely consistent with 2022.

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

Legend: ■ 2024 ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	41%	38%	44%	50%	48%	42%	37%	31%
2022	42%	37%	39%	50%	49%	40%	41%	35%
(n 2024)	(6,375)	(965)	(812)	(722)	(982)	(940)	(970)	(984)
(n 2022)	(7,073)	(1,006)	(1,000)	(1,004)	(1,001)	(1,001)	(1,002)	(1,059)

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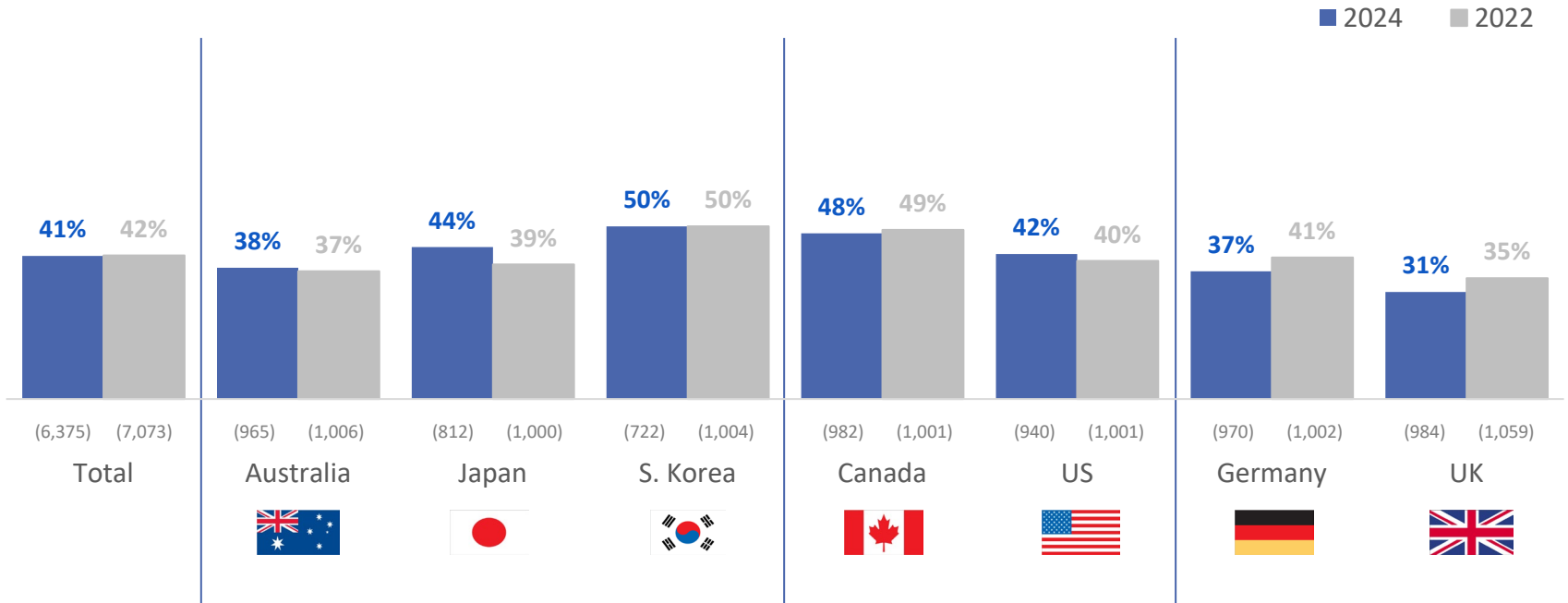
Survey enjoyment varies greatly across countries – Germany claims to have the most positive experiences, while those in Japan and South Korea are far less satisfied.

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Perception of Survey Enjoyability

Country	All/Many Were Enjoyable	Some Were Enjoyable	Few/None Were Enjoyable	Don't know
Total (8,727)	32%	40%	25%	3%
Australia (965)	30%	44%	24%	1%
Japan (812)	12%	38%	42%	9%
S. Korea (722)	16%	45%	35%	5%
NZ (461)	26%	39%	33%	2%
Canada (982)	32%	41%	26%	1%
Mexico (935)	45%	35%	18%	2%
US (940)	33%	38%	25%	3%
Germany (970)	59%	30%	9%	2%
Spain (956)	33%	46%	19%	3%
UK (984)	37%	41%	20%	2%

■ All/Many Were Enjoyable □ Some Were Enjoyable ■ Few/None Were Enjoyable ■ Don't know

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

■ 2024   ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	31%	30%	12%	16%	32%	33%	59%	37%
2022	35%	32%	11%	18%	38%	37%	60%	47%
(2024 base)	(6,375)	(965)	(812)	(722)	(982)	(940)	(970)	(984)
(2022 base)	(7,073)	(1,006)	(1,000)	(1,004)	(1,001)	(1,001)	(1,002)	(1,059)
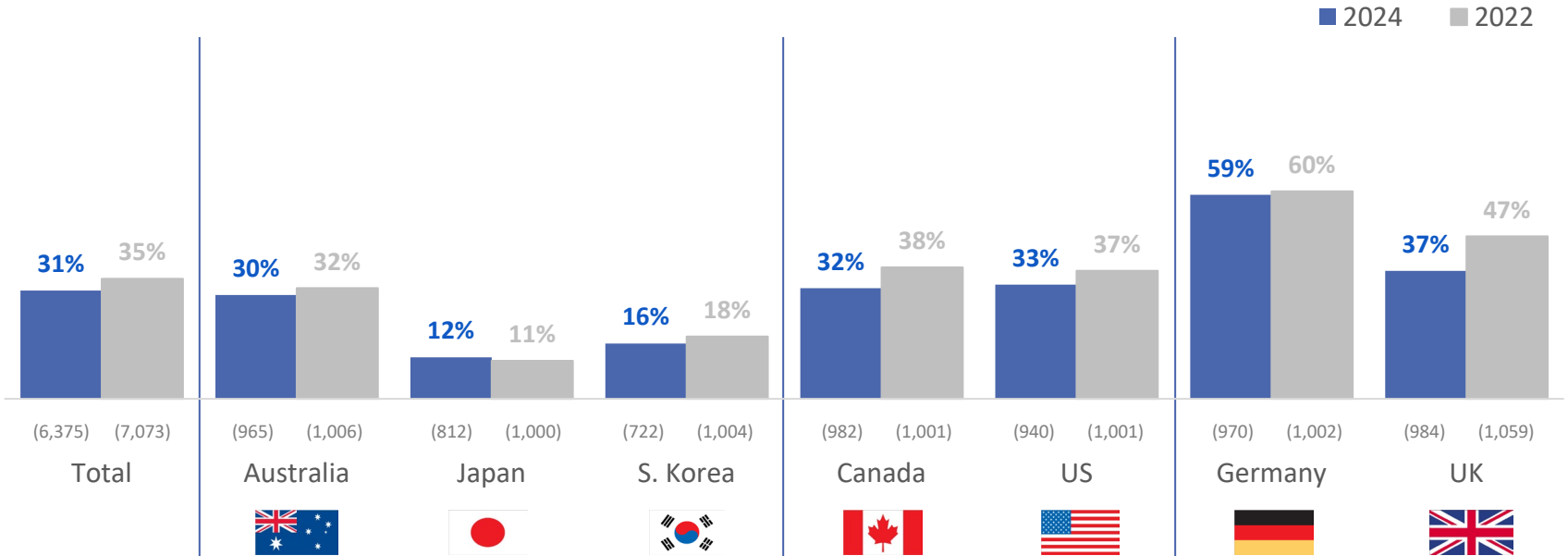
There's a positive relationship between survey length and enjoyment in Germany and the UK; however, New Zealanders report below-average enjoyment despite being content with survey length.

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Relationship Between Survey Length & Enjoyability

All/Many Survey are Enjoyable ↑

Too Long/Too Short + High Enjoyment

Just Right + High Enjoyment

Germany

Mexico

US

Canada

Spain

Australia

UK

New Zealand

South Korea

Japan

Too Long/Too Short + Low Enjoyment

Just Right + Low Enjoyment

Survey Length is Just Right →
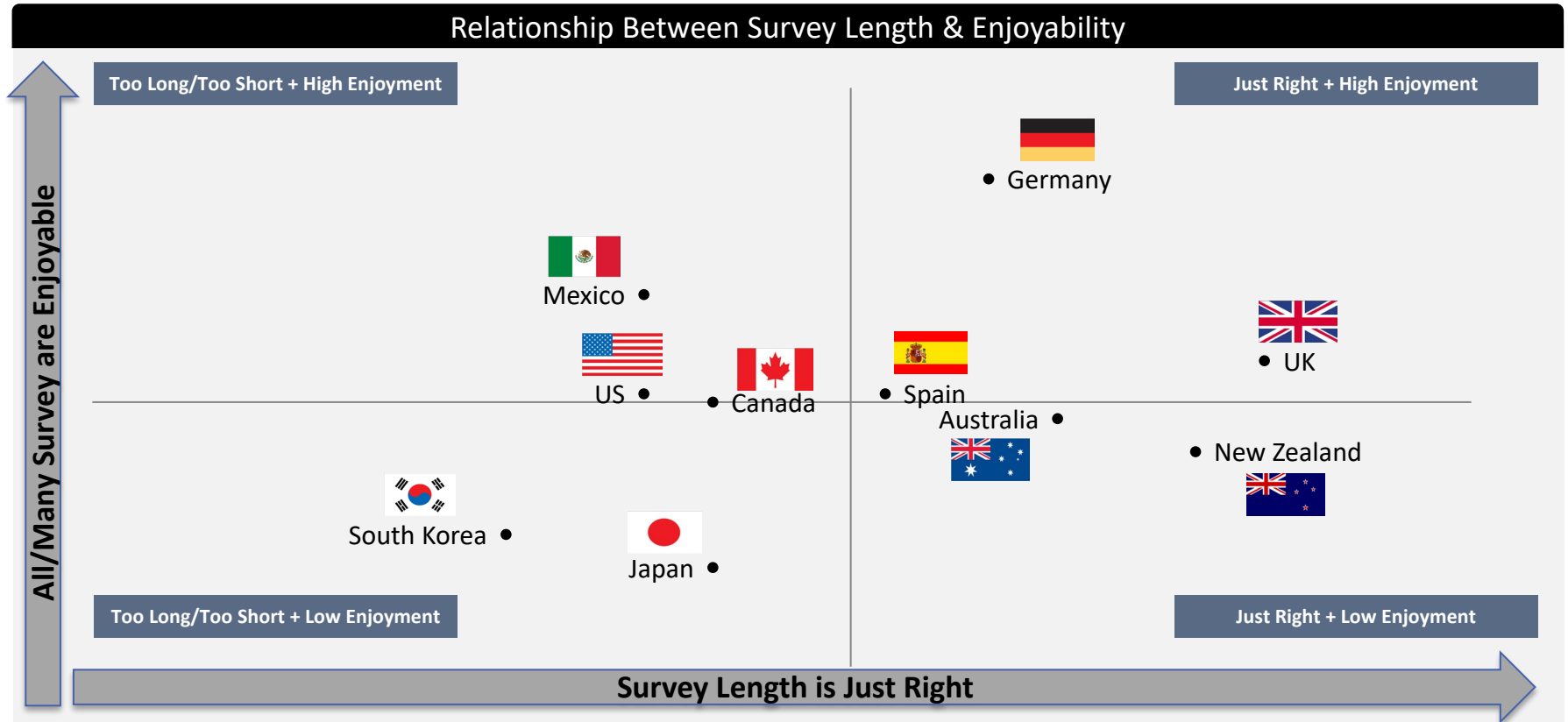
PERSONAL DATA USE

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

PERSONAL DATA

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Familiarity with Personal Data Collection & Use

Not Very/At All Familiar

2024: 38%

Very/Somewhat Familiar

2024: 59%

3%

7%

13%

31%

46%
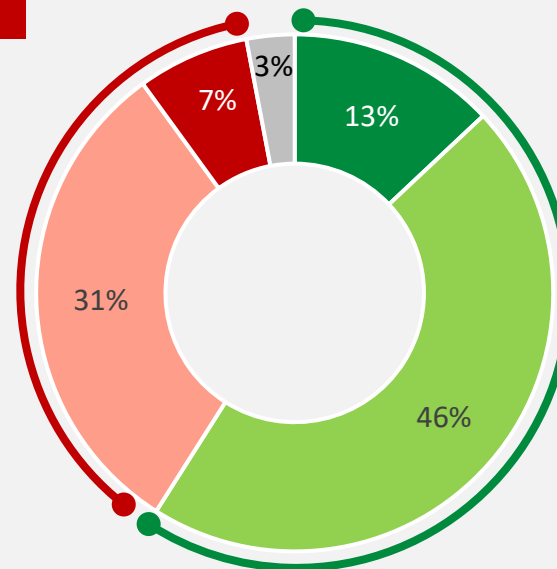
■ Very familiar   ■ Somewhat familiar   ■ Not very familiar   ■ Not at all familiar   ■ Don't Know

Personal Data

Name
Home Address
Business Address
Identity Card No
Passport No
Driving License
Income Tax No
Car Registration
Other

Confidential Data

[Identify Person]

Personal data collection and usage practices are far less known in Japan than in most other countries.

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Familiarity with Personal Data Collection & Use

Top 2 Box

	Total	Australia	Japan	S. Korea	NZ	Canada	Mexico	US	Germany	Spain	UK
Top 2 Box	59%	64%	30%	49%	61%	66%	68%	66%	70%	60%	61%
Very familiar	13%	14%	4%	7%	13%	18%	18%	18%	14%	13%	14%
Somewhat familiar	46%	50%	25%	42%	48%	48%	50%	48%	57%	47%	47%
Not very familiar	31%	29%	52%	41%	30%	26%	21%	21%	26%	33%	30%
Not at all familiar	7%	5%	15%	5%	7%	6%	8%	7%	2%	6%	5%
Don't Know	3%	2%	3%	5%	3%	2%	3%	6%	2%	1%	3%

Legend:
- Very familiar
- Somewhat familiar
- Not very familiar
- Not at all familiar
- Don't Know

| Total (4,789) | Australia (500) | Japan (500) | S. Korea (504) | NZ (250) | Canada (503) | Mexico (524) | US (500) | Germany (499) | Spain (509) | UK (500) |

While familiarity eroded in South Korea, it's largely stable in other countries.
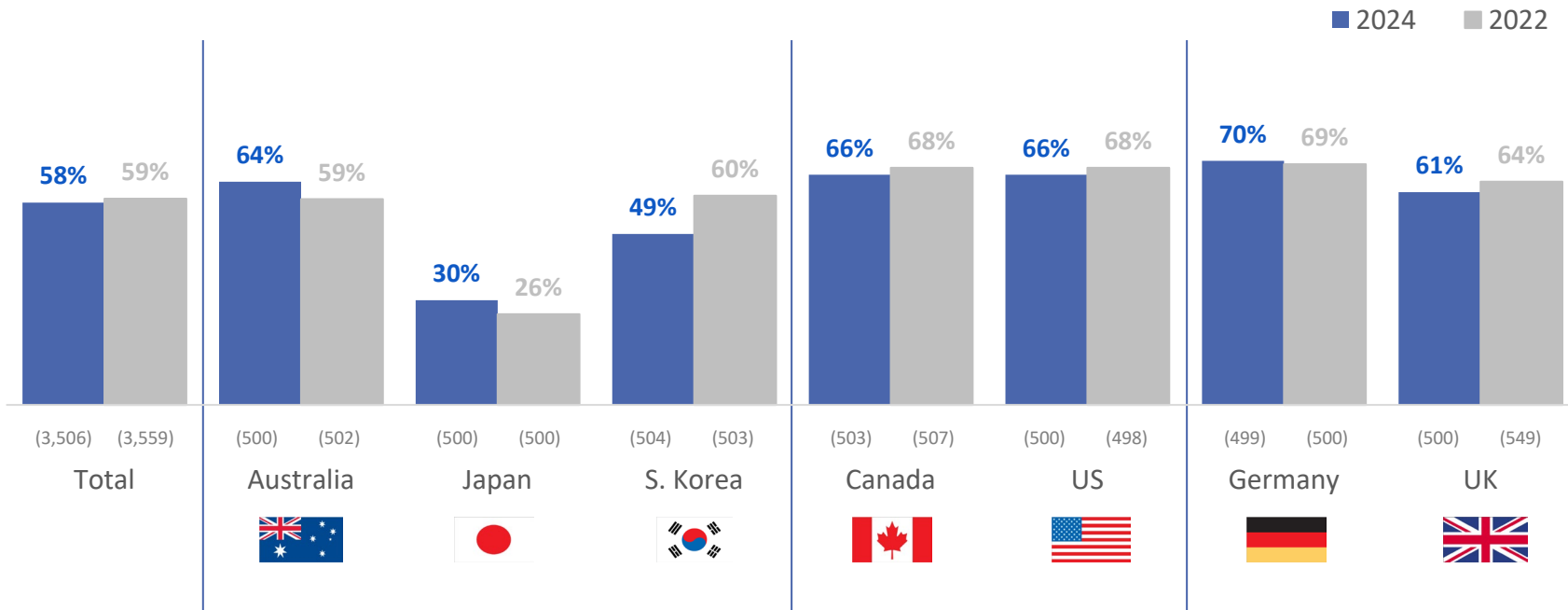
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Familiarity with Personal Data Collection & Use (Top 2 Box %) - Trended to 2022

■ 2024 ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	58%	64%	30%	49%	66%	66%	70%	61%
2022	59%	59%	26%	60%	68%	68%	69%	64%
(n)	(3,506) (3,559)	(500) (502)	(500) (500)	(504) (503)	(503) (507)	(500) (498)	(499) (500)	(500) (549)

Level of Concern Regarding Misuse of Personal Data

Not Very/At All Concerned

2024: 16%

Very/Somewhat Concerned

2024: 82%

3% 2%

13%

36%

46%

- 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.

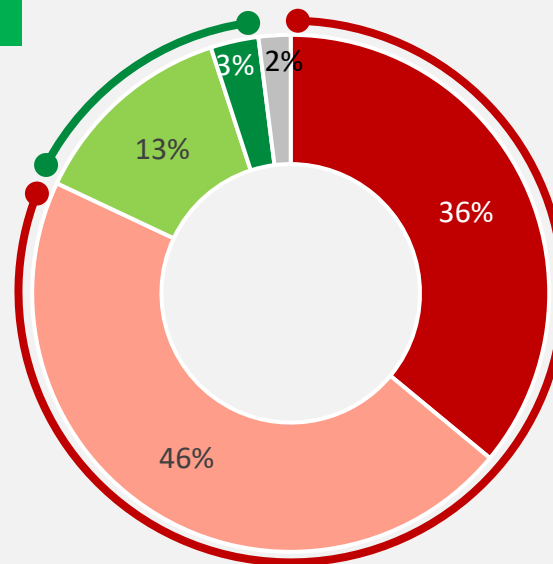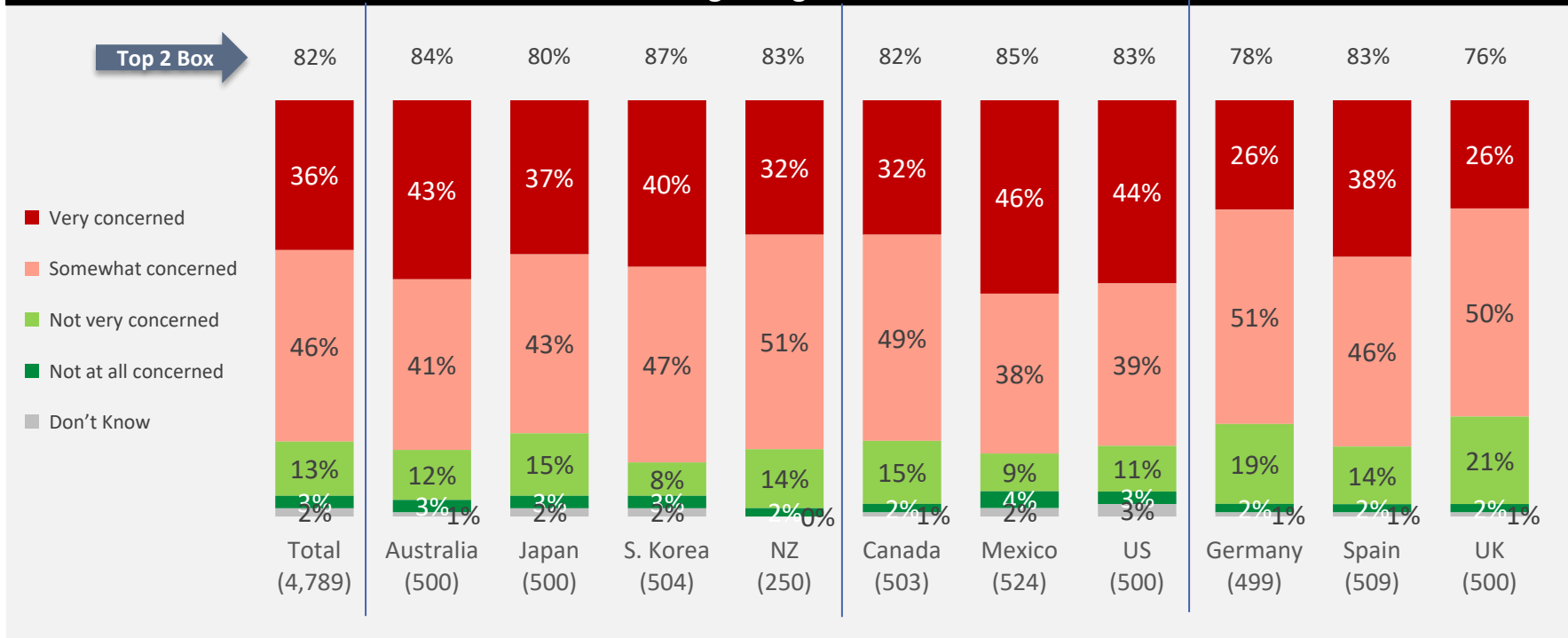**Level of Concern Regarding Misuse of Personal Data**

Top 2 Box

	Total	Australia	Japan	S. Korea	NZ	Canada	Mexico	US	Germany	Spain	UK
Top 2 Box	82%	84%	80%	87%	83%	82%	85%	83%	78%	83%	76%
Very concerned	36%	43%	37%	40%	32%	32%	46%	44%	26%	38%	26%
Somewhat concerned	46%	41%	43%	47%	51%	49%	38%	39%	51%	46%	50%
Not very concerned	13%	12%	15%	8%	14%	15%	9%	11%	19%	14%	21%
Not at all concerned	3%	3%	3%	3%	2%	2%	4%	3%	2%	2%	2%
Don't Know	2%	1%	2%	2%	0%	1%	2%	3%	1%	1%	1%

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

Base sizes:
- Total (4,789)
- Australia (500)
- Japan (500)
- S. Korea (504)
- NZ (250)
- Canada (503)
- Mexico (524)
- US (500)
- Germany (499)
- Spain (509)
- UK (500)

Though still considerable, concerns have eased a bit in Japan, South Korea, and the UK vs. 2022. That said, worries about misuse of data increased slightly in the US.

Level of Concern Regarding Misuse of Personal Data (Top 2 Box % - Very/Somewhat Concerned) - Trended to 2022
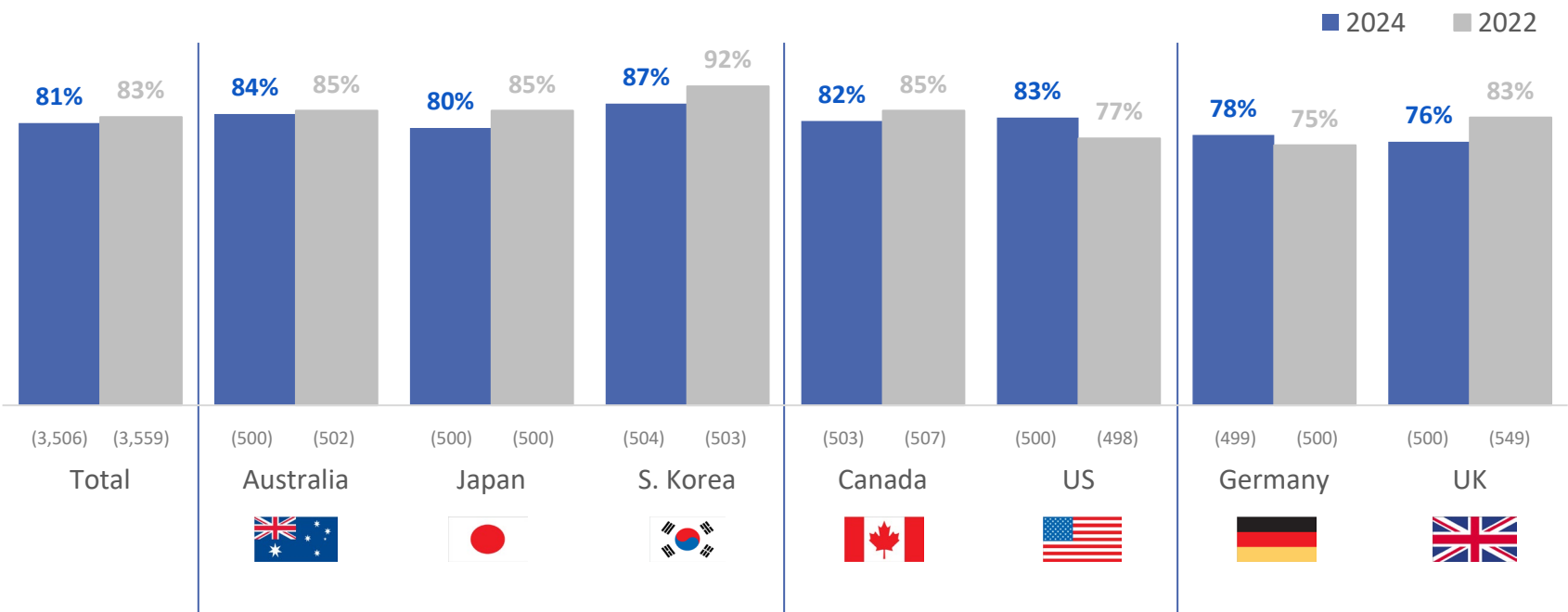
■ 2024   ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	81%	84%	80%	87%	82%	83%	78%	76%
2022	83%	85%	85%	92%	85%	77%	75%	83%
(n) 2024	(3,506)	(500)	(500)	(504)	(503)	(500)	(499)	(500)
(n) 2022	(3,559)	(502)	(500)	(503)	(507)	(498)	(500)	(549)

Data is based on comparable countries across waves.

Relationship Between Familiarity & Concern of Misuse of Personal Data Use

Concern with Personal Data Misuse (vertical axis)

Familiarity with How Personal Data is Collected & Used (horizontal axis)

Low Familiarity + Low Concern

High Familiarity + Low Concern

Low Familiarity + High Concern

High Familiarity + High Concern

- Japan
- UK
- Germany
- Canada
- Spain
- New Zealand
- Australia
- US
- Mexico
- South Korea
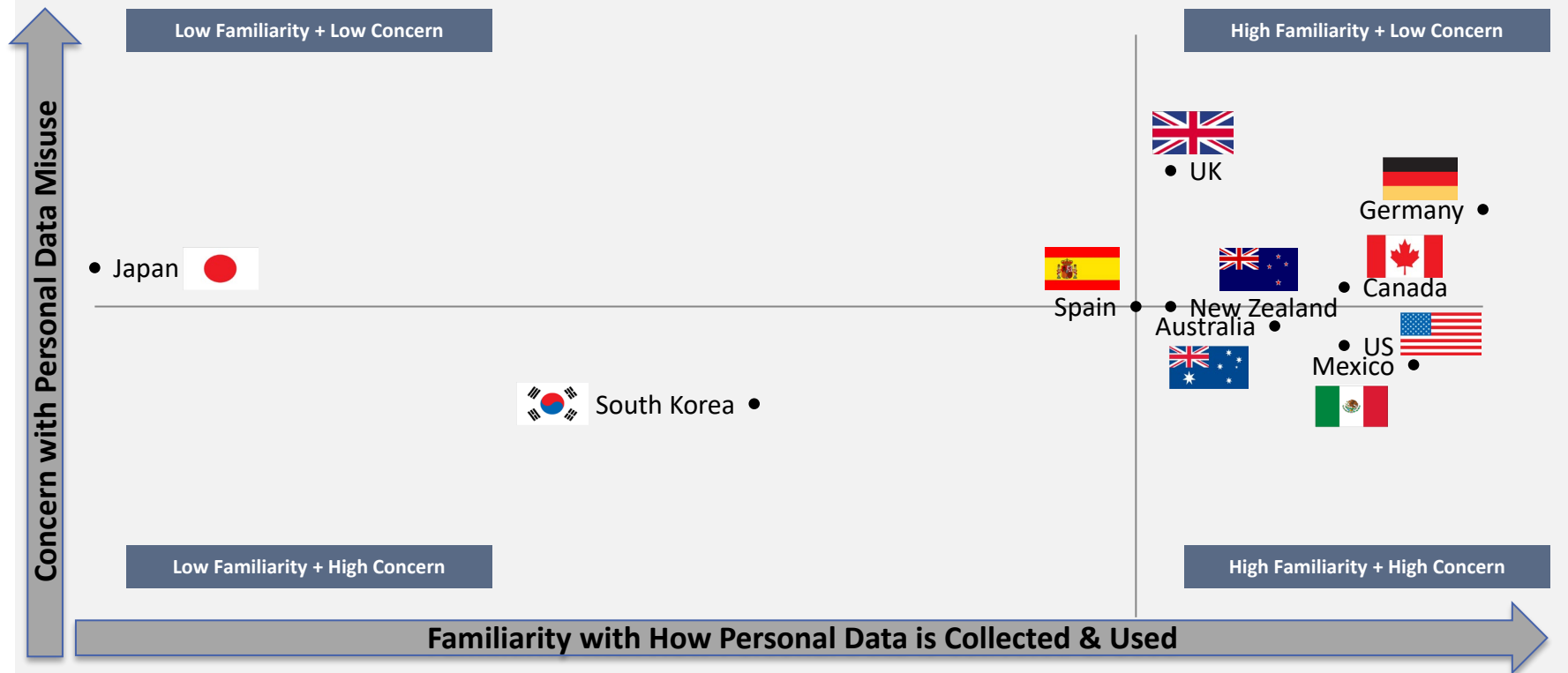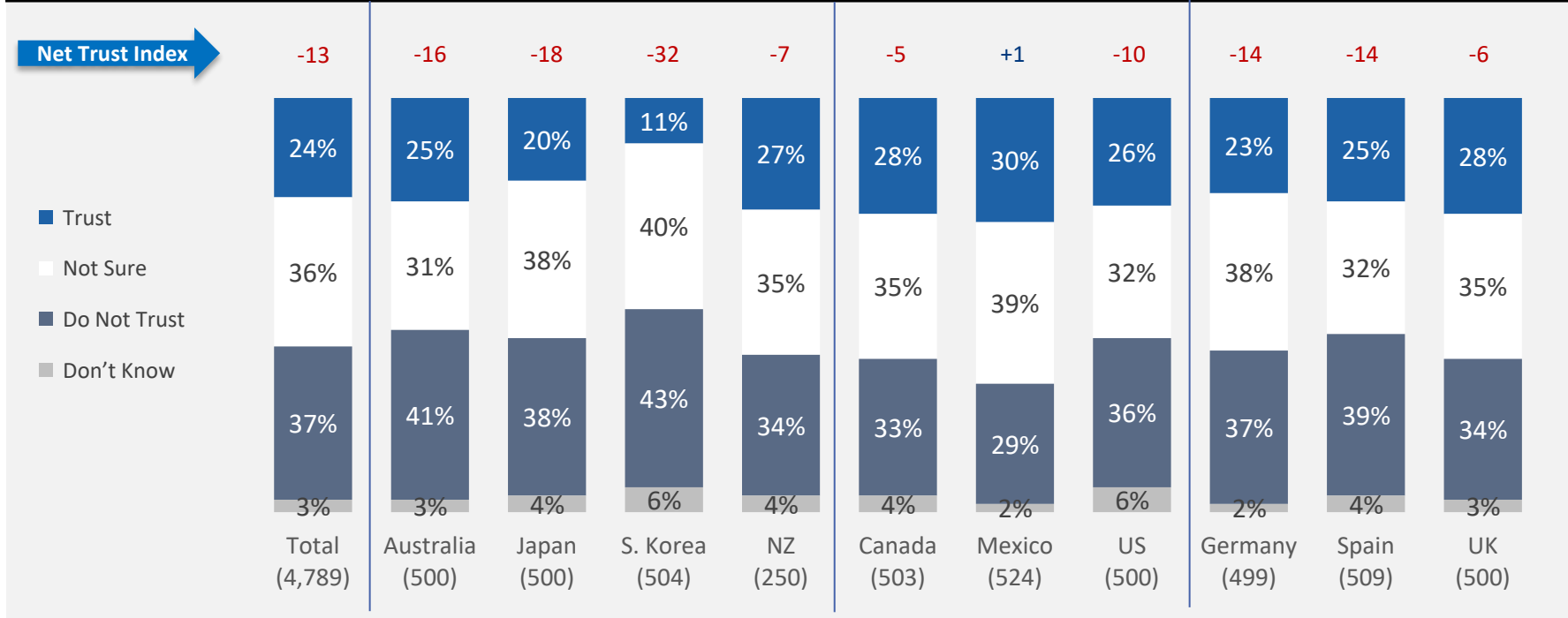
PROTECTION & USE OF PERSONAL DATA

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

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

Net Trust Index	-13	-16	-18	-32	-7	-5	+1	-10	-14	-14	-6
Trust	24%	25%	20%	11%	27%	28%	30%	26%	23%	25%	28%
Not Sure	36%	31%	38%	40%	35%	35%	39%	32%	38%	32%	35%
Do Not Trust	37%	41%	38%	43%	34%	33%	29%	36%	37%	39%	34%
Don't Know	3%	3%	4%	6%	4%	4%	2%	6%	2%	4%	3%
	Total (4,789)	Australia (500)	Japan (500)	S. Korea (504)	NZ (250)	Canada (503)	Mexico (524)	US (500)	Germany (499)	Spain (509)	UK (500)

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
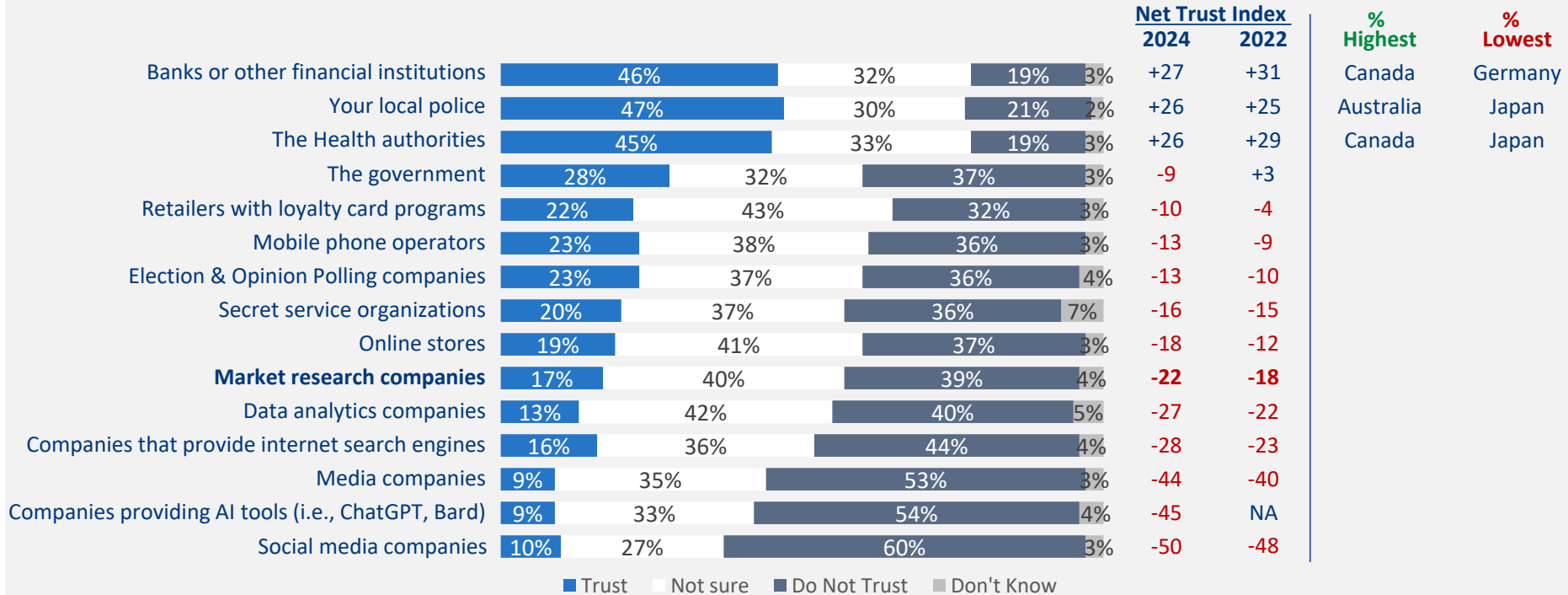**Total based on comparable countries across waves.*
†Scores are an average across the 15 industries/organizations analyzed

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Financial institutions, law enforcement and healthcare authorities hold the public's highest trust in safeguarding personal data. Conversely, media companies, AI providers and social media platforms face the most distrust. Market research firms also rank towards the bottom in this regard.

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Trust has eroded to some degree across all organizations/industries vs. 2022, except in relation to the local police.

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

	Trust	Not sure	Do Not Trust	Don't Know	Net Trust Index 2024	Net Trust Index 2022	% Highest	% Lowest
Banks or other financial institutions	46%	32%	19%	3%	+27	+31	Canada	Germany
Your local police	47%	30%	21%	2%	+26	+25	Australia	Japan
The Health authorities	45%	33%	19%	3%	+26	+29	Canada	Japan
The government	28%	32%	37%	3%	-9	+3		
Retailers with loyalty card programs	22%	43%	32%	3%	-10	-4		
Mobile phone operators	23%	38%	36%	3%	-13	-9		
Election & Opinion Polling companies	23%	37%	36%	4%	-13	-10		
Secret service organizations	20%	37%	36%	7%	-16	-15		
Online stores	19%	41%	37%	3%	-18	-12		
Market research companies	17%	40%	39%	4%	**-22**	**-18**		
Data analytics companies	13%	42%	40%	5%	-27	-22		
Companies that provide internet search engines	16%	36%	44%	4%	-28	-23		
Media companies	9%	35%	53%	3%	-44	-40		
Companies providing AI tools (i.e., ChatGPT, Bard)	9%	33%	54%	4%	-45	NA		
Social media companies	10%	27%	60%	3%	-50	-48		

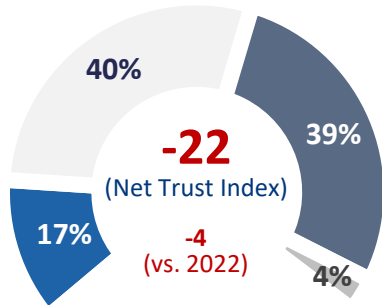■ Trust   □ Not sure   ■ Do Not Trust   ■ Don't Know

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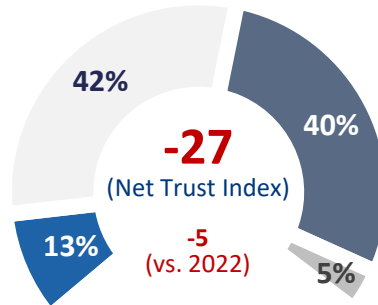*Data is based on comparable countries across waves.*

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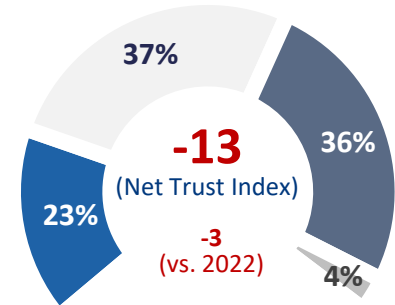
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Trust in Market Research

40%
39%
-22
(Net Trust Index)
17%
-4
(vs. 2022)
4%

Trust in Data Analytics

42%
40%
-27
(Net Trust Index)
13%
-5
(vs. 2022)
5%

Trust in Election & Opinion Polling

37%
36%
-13
(Net Trust Index)
23%
-3
(vs. 2022)
4%

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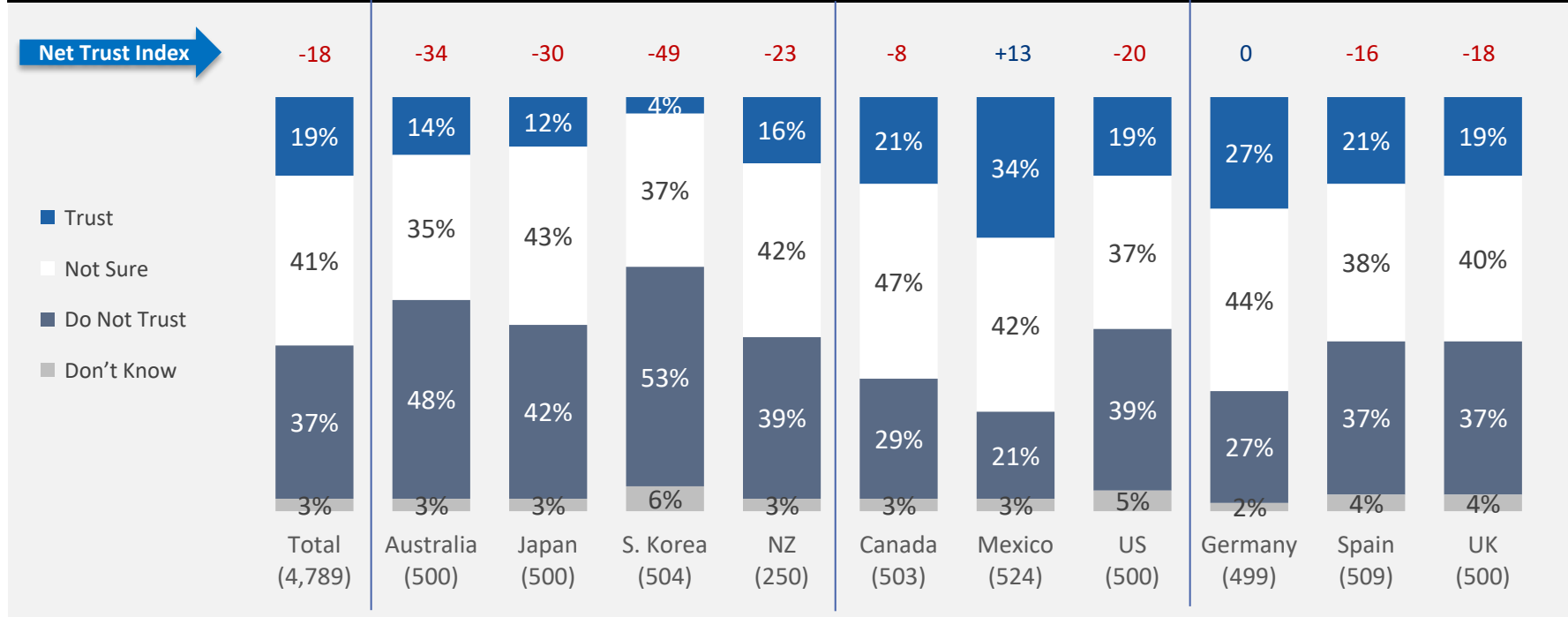■ Do Not Trust
■ Don't know

Net Trust Index = % Trust – % Do Not Trust
Data is based on comparable countries across waves.

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

Trust in Market Research to Protect & Appropriately Use Personal Data

Net Trust Index

	Total	Australia	Japan	S. Korea	NZ	Canada	Mexico	US	Germany	Spain	UK
Net Trust Index	-18	-34	-30	-49	-23	-8	+13	-20	0	-16	-18
Trust	19%	14%	12%	4%	16%	21%	34%	19%	27%	21%	19%
Not Sure	41%	35%	43%	37%	42%	47%	42%	37%	44%	38%	40%
Do Not Trust	37%	48%	42%	53%	39%	29%	21%	39%	27%	37%	37%
Don't Know	3%	3%	3%	6%	3%	3%	3%	5%	2%	4%	4%
	Total (4,789)	Australia (500)	Japan (500)	S. Korea (504)	NZ (250)	Canada (503)	Mexico (524)	US (500)	Germany (499)	Spain (509)	UK (500)

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

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.

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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.

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

	Net Trust Index	Rank
Total	-18% / -13%	10 of 15
Australia	-34% / -16%	10 of 15
Japan	-30% / -18%	12 of 15
S. Korea	-49% / -32%	14 of 15
NZ	-23% / -7%	11 of 15
Canada	-8% / -5%	8 of 15
Mexico	+1% / +13%	3 of 15
US	-20% / -10%	12 of 15
Germany	-14% / 0%	5 of 15
Spain	-16% / -14%	8 of 15
UK	-18% / -6%	10 of 15

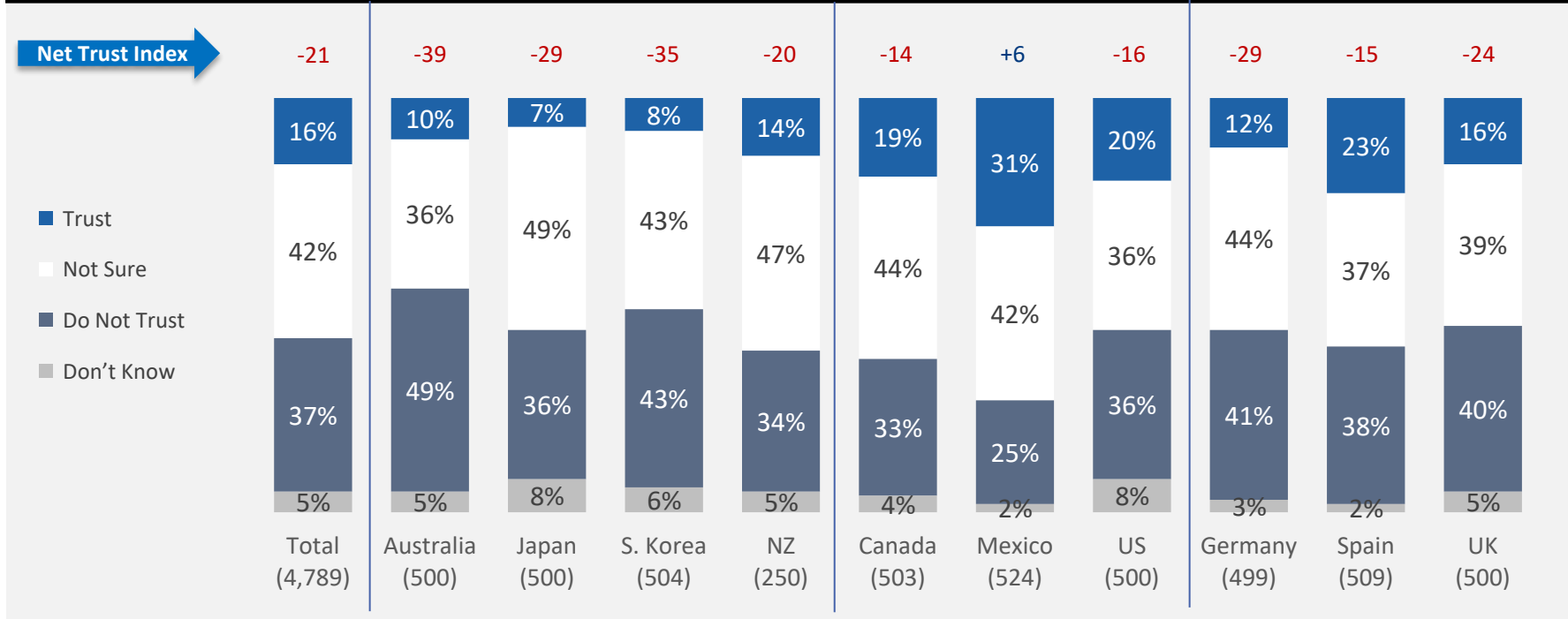Net Trust Index ■ Country Average ■ Market Research Companies
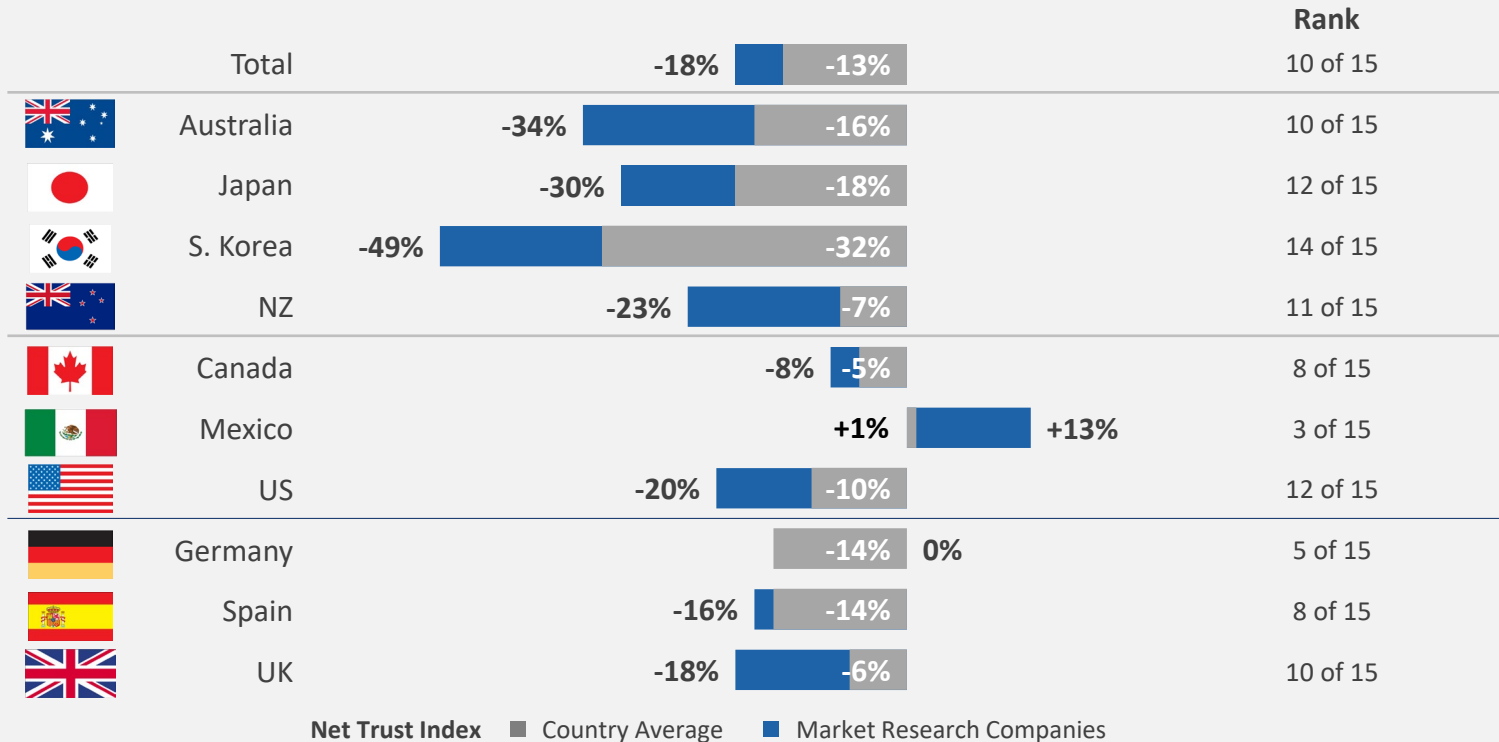
Net Trust Index = % Trust − % Do Not Trust

Outside of Mexico, there's deep distrust in data analytics companies' perceived handling of personal data.

Trust in Data Analytics to Protect & Appropriately Use Personal Data

Net Trust Index

	Total (4,789)	Australia (500)	Japan (500)	S. Korea (504)	NZ (250)	Canada (503)	Mexico (524)	US (500)	Germany (499)	Spain (509)	UK (500)
Net Trust Index	-21	-39	-29	-35	-20	-14	+6	-16	-29	-15	-24
Trust	16%	10%	7%	8%	14%	19%	31%	20%	12%	23%	16%
Not Sure	42%	36%	49%	43%	47%	44%	42%	36%	44%	37%	39%
Do Not Trust	37%	49%	36%	43%	34%	33%	25%	36%	41%	38%	40%
Don't Know	5%	5%	8%	6%	5%	4%	2%	8%	3%	2%	5%

Legend:
- 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 all countries except Canada.

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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.

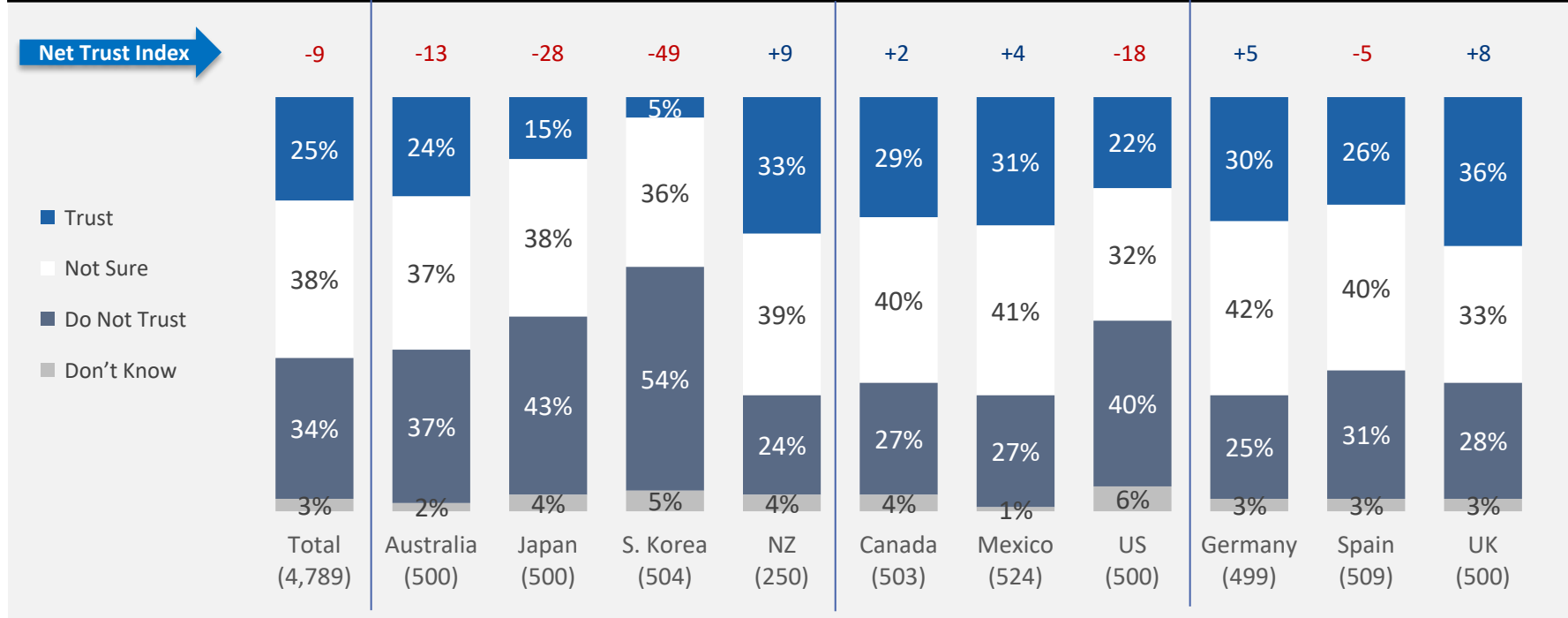**GLOBAL RESEARCH BUSINESS NETWORK**
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Trust in Election & Opinion Polling to Protect & Appropriately Use Personal Data

Net Trust Index

	Total (4,789)	Australia (500)	Japan (500)	S. Korea (504)	NZ (250)	Canada (503)	Mexico (524)	US (500)	Germany (499)	Spain (509)	UK (500)
Net Trust Index	-9	-13	-28	-49	+9	+2	+4	-18	+5	-5	+8
Trust	25%	24%	15%	5%	33%	29%	31%	22%	30%	26%	36%
Not Sure	38%	37%	38%	36%	39%	40%	41%	32%	42%	40%	33%
Do Not Trust	34%	37%	43%	54%	24%	27%	27%	40%	25%	31%	28%
Don't Know	3%	2%	4%	5%	4%	4%	1%	6%	3%	3%	3%

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

Net Trust Index = % Trust – % Do Not Trust

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

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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

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

Appropriate Use of Personal Data by Market Research

Bottom 2 Box: Inappropriate

2024: 25%

Top 2 Box: Appropriate

2024: 25%

6%

18%

41%

17%

8%

10%
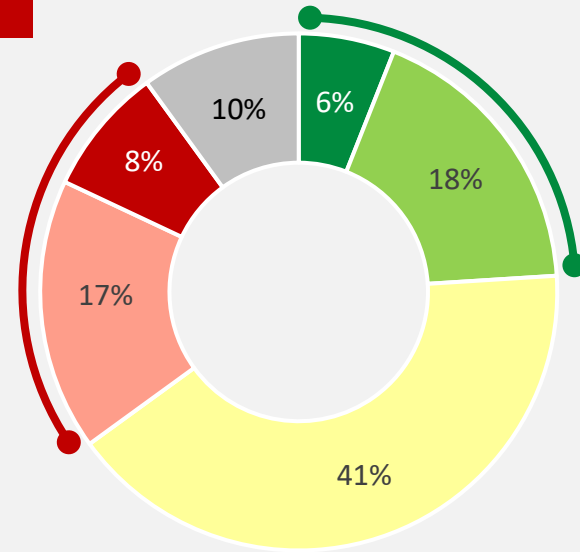
- 5 - Completely appropriate
- 4
- 3
- 2
- 1 - Completely inappropriate
- Don't know

This mixed sentiment is evident across countries – Mexico and Germany being the most favorable, while South Korea, Japan and New Zealand are least so.
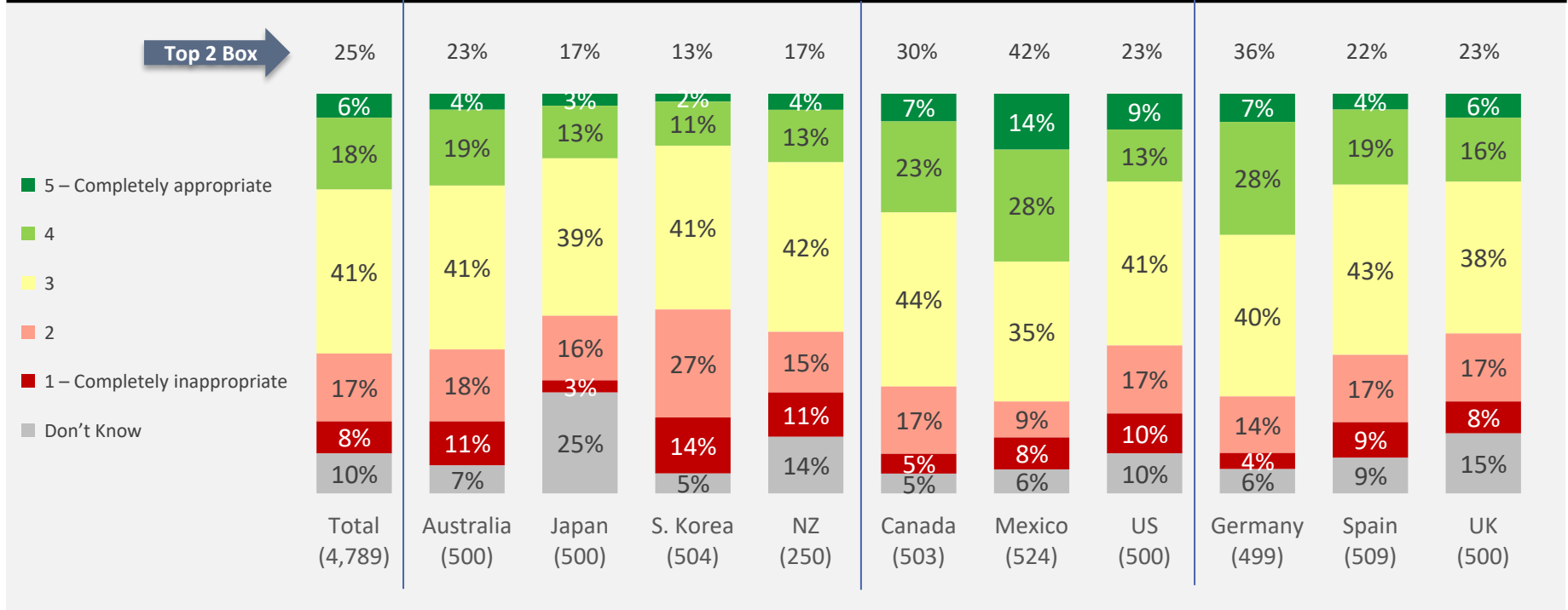
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Appropriate Use of Personal Data by Market Research

	Total (4,789)	Australia (500)	Japan (500)	S. Korea (504)	NZ (250)	Canada (503)	Mexico (524)	US (500)	Germany (499)	Spain (509)	UK (500)
Top 2 Box	25%	23%	17%	13%	17%	30%	42%	23%	36%	22%	23%
5 – Completely appropriate	6%	4%	3%	2%	4%	7%	14%	9%	7%	4%	6%
4	18%	19%	13%	11%	13%	23%	28%	13%	28%	19%	16%
3	41%	41%	39%	41%	42%	44%	35%	41%	40%	43%	38%
2	17%	18%	16%	27%	15%	17%	9%	17%	14%	17%	17%
1 – Completely inappropriate	8%	11%	3%	14%	11%	5%	8%	10%	4%	9%	8%
Don't Know	10%	7%	25%	5%	14%	5%	6%	10%	6%	9%	15%

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Appropriate Use of Personal Data by Market Research (Top 2 Box %) - Trended to 2022
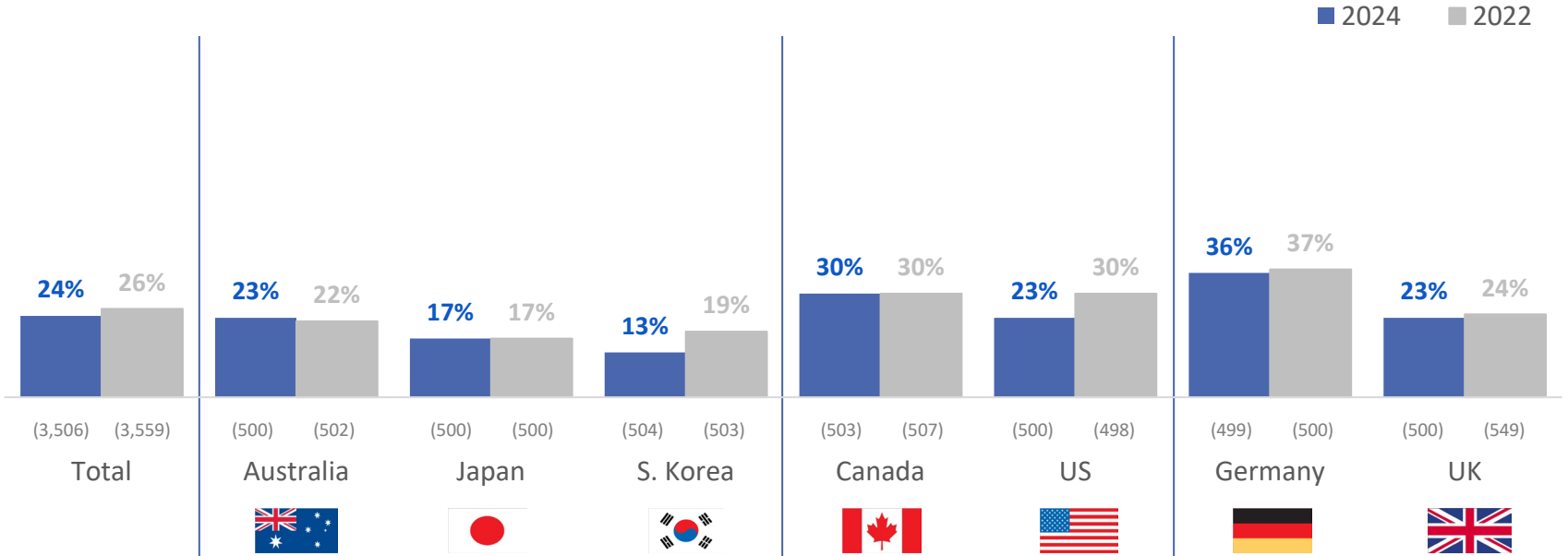
■ 2024 ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	24%	23%	17%	13%	30%	23%	36%	23%
2022	26%	22%	17%	19%	30%	30%	37%	24%
(n 2024)	(3,506)	(500)	(500)	(504)	(503)	(500)	(499)	(500)
(n 2022)	(3,559)	(502)	(500)	(503)	(507)	(498)	(500)	(549)

Concern that Market Research Securely Protects Personal Data

Bottom 2 Box: Not Concerned

2024: 16%

Top 2 Box: Concerned

2024: 45%

4% 6%

15%

12%

29%

34%
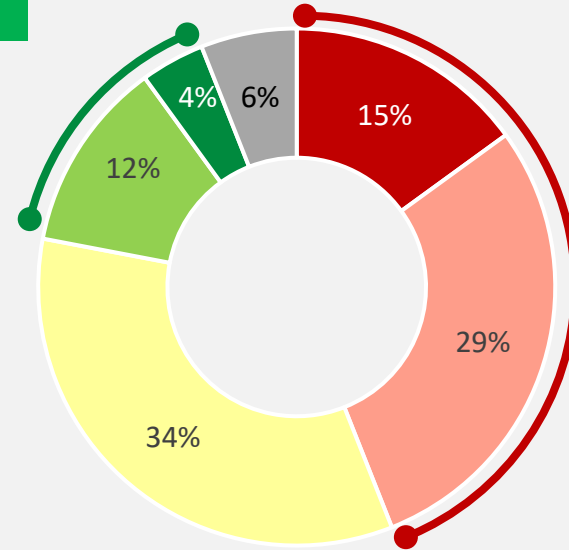
- 5 - Completely concerned
- 4
- 3
- 2
- 1 - Not at all concerned
- Don't know

Concern in this regard is lowest in Japan and Germany.

Concern that Market Research Securely Protects Personal Data

Top 2 Box

	Total (4,789)	Australia (500)	Japan (500)	S. Korea (504)	NZ (250)	Canada (503)	Mexico (524)	US (500)	Germany (499)	Spain (509)	UK (500)
Top 2 Box	45%	49%	31%	53%	48%	42%	49%	52%	32%	45%	43%
5 – Completely concerned	15%	16%	9%	21%	14%	12%	23%	22%	8%	14%	14%
4	29%	33%	22%	32%	34%	30%	27%	30%	24%	31%	29%
3	34%	31%	35%	28%	32%	38%	32%	28%	40%	35%	35%
2	12%	10%	15%	12%	8%	12%	10%	10%	19%	13%	13%
1 – Not at all concerned	4%	4%	2%	5%	4%	3%	5%	4%	5%	3%	2%
Don't Know	6%	5%	17%	3%	8%	4%	4%	6%	4%	4%	7%
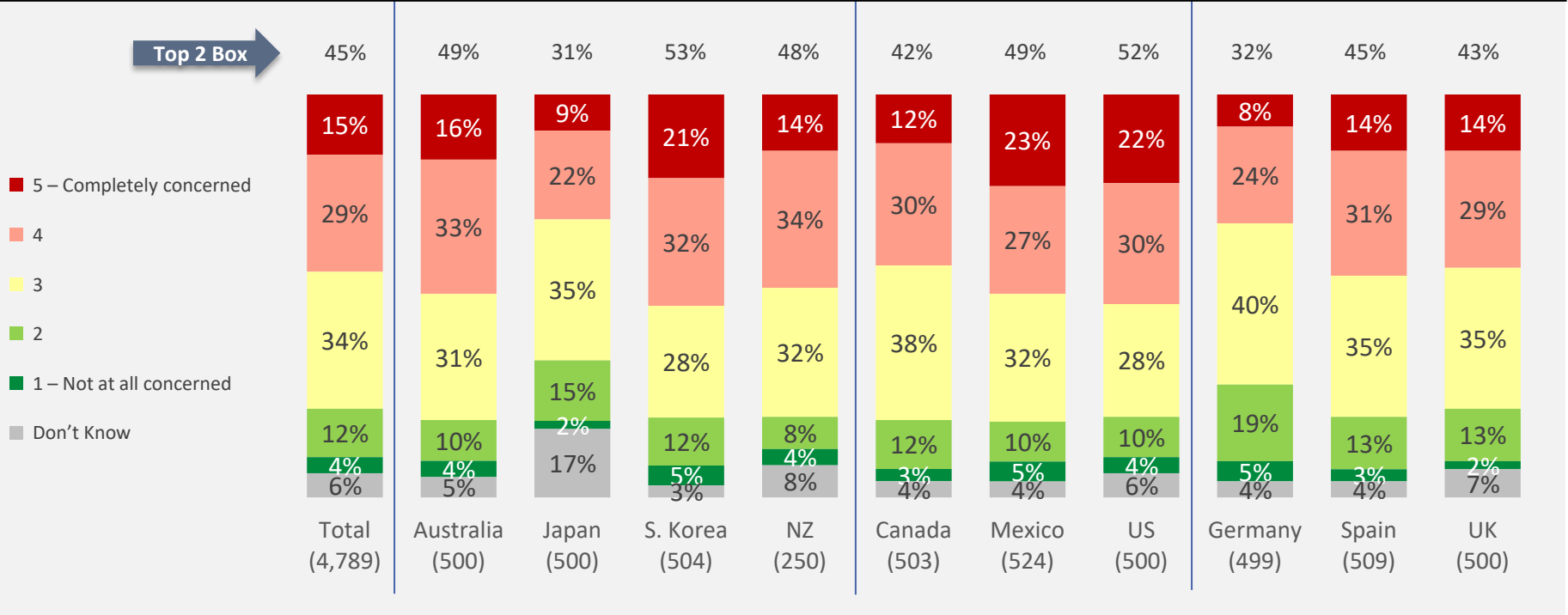
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Concern that Market Research Securely Protects Personal Data (Top 2 Box %) - Trended to 2022

■ 2024 ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	43%	49%	31%	53%	42%	52%	32%	43%
2022	45%	50%	37%	64%	46%	49%	29%	43%
(base)	(3,506) / (3,559)	(500) / (502)	(500) / (500)	(504) / (503)	(503) / (507)	(500) / (498)	(499) / (500)	(500) / (549)
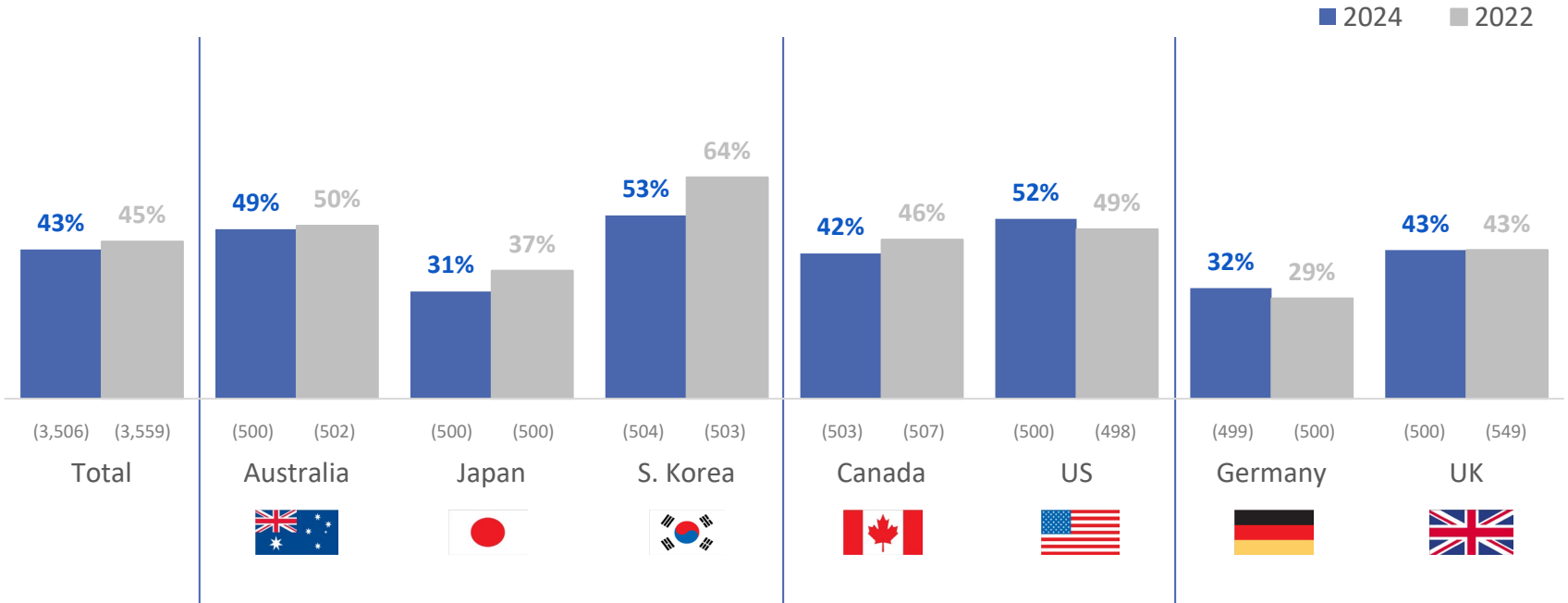
There is a mixed level of knowledge regarding the collection, storage and usage of personal data by market research companies, and very few feel completely informed.

Degree Informed about Personal Data Collection, Storage & Use

Bottom 2 Box: Not Informed

2024: 34%

Top 2 Box: Informed

2024: 26%

Do you know where your data is?

- 7% — 5 - Completely informed
- 19% — 4
- 33% — 3
- 20% — 2
- 13% — 1 - Not at all informed
- 7% — Don't know
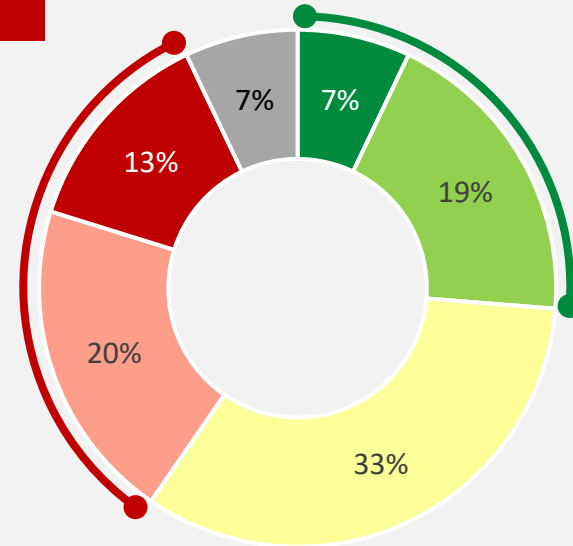
■ 5 - Completely informed   ■ 4   ■ 3   ■ 2   ■ 1 - Not at all informed   ■ Don't know

Consumers in Mexico and Germany feel the most informed, while those in Japan, South Korea and New Zealand feel the least so.
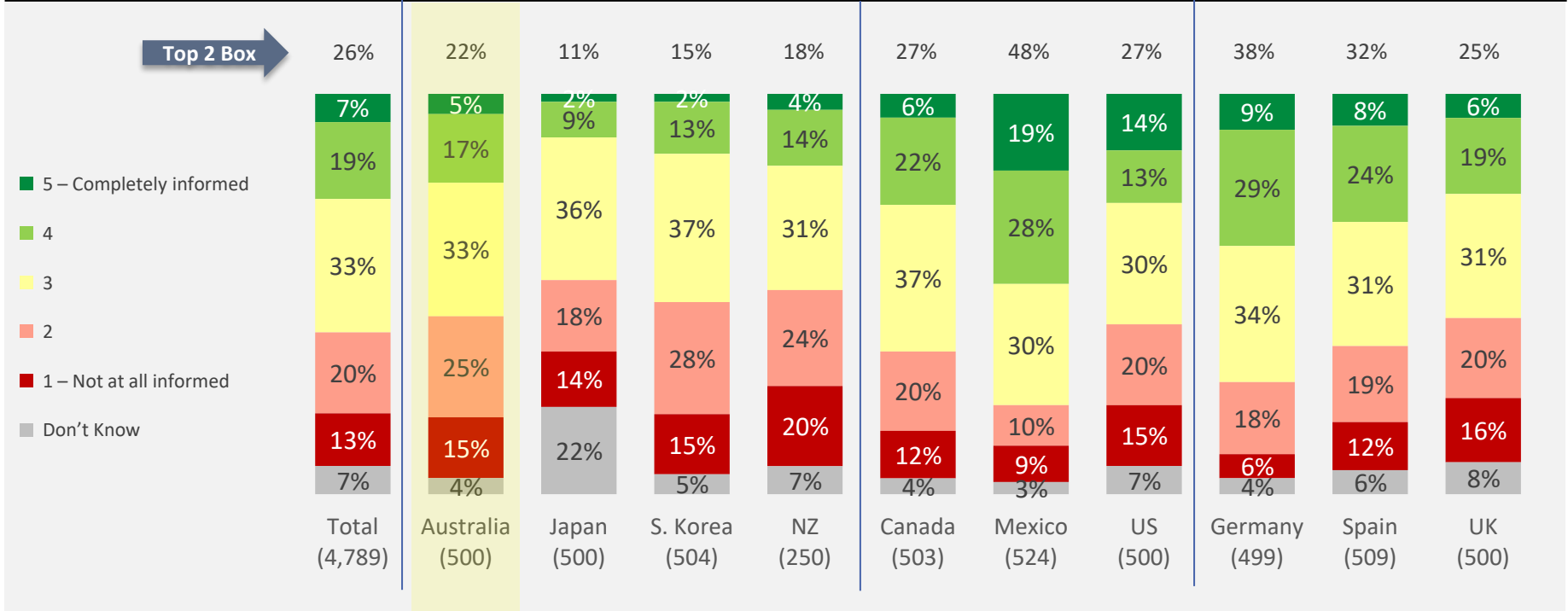
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Degree Informed about Personal Data Collection, Storage & Use

	Total (4,789)	Australia (500)	Japan (500)	S. Korea (504)	NZ (250)	Canada (503)	Mexico (524)	US (500)	Germany (499)	Spain (509)	UK (500)
Top 2 Box	26%	22%	11%	15%	18%	27%	48%	27%	38%	32%	25%
5 – Completely informed	7%	5%	2%	2%	4%	6%	19%	14%	9%	8%	6%
4	19%	17%	9%	13%	14%	22%	28%	13%	29%	24%	19%
3	33%	33%	36%	37%	31%	37%	30%	30%	34%	31%	31%
2	20%	25%	18%	28%	24%	20%	10%	20%	18%	19%	20%
1 – Not at all informed	13%	15%	14%	15%	20%	12%	9%	15%	6%	12%	16%
Don't Know	7%	4%	22%	5%	7%	4%	3%	7%	4%	6%	8%

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

■ 2024   ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	24%	22%	11%	15%	27%	27%	38%	25%
2022	26%	20%	13%	23%	29%	35%	39%	25%
base	(3,506) (3,559)	(500) (502)	(500) (500)	(504) (503)	(503) (507)	(500) (498)	(499) (500)	(500) (549)

Data is based on comparable countries across waves.
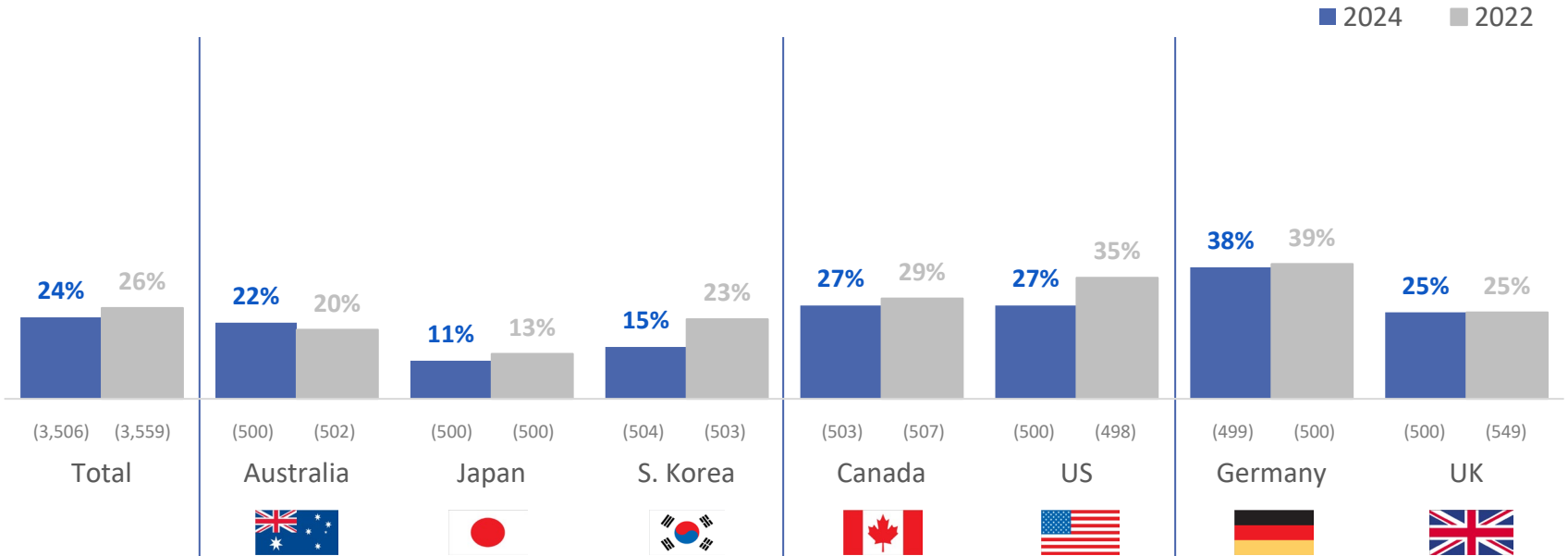
HOW AI
IMPACTS
THE LEVEL OF TRUST
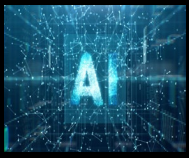
Incorporating AI into market research practices negatively impacts trust in market research companies, especially in New Zealand and Australia.

Average Impact on Trust of Market Research Companies Using AI†

Net Trust Index

	Total	Australia	Japan	S. Korea	NZ	Canada	Mexico	US	Germany	Spain	UK
Net Trust Index	-37	-53	-22	-28	-58	-36	-17	-36	-42	-44	-38

Legend:
- ■ Increase Trust
- □ No Impact
- ■ Decrease Trust
- ■ Don't Know

	Total	Australia	Japan	S. Korea	NZ	Canada	Mexico	US	Germany	Spain	UK
Increase Trust	10%	4%	9%	9%	5%	9%	22%	13%	8%	8%	9%
No Impact	32%	27%	40%	44%	23%	36%	32%	26%	34%	30%	31%
Decrease Trust	47%	57%	31%	37%	63%	45%	39%	49%	50%	52%	47%
Don't Know	11%	12%	20%	10%	9%	10%	7%	12%	8%	10%	13%

| Total (7,803) | Australia (500) | Japan (1,000) | S. Korea (1,002) | NZ (250) | Canada (1,000) | Mexico (1,051) | US (500) | Germany (1,000) | Spain (1,000) | UK (500) |
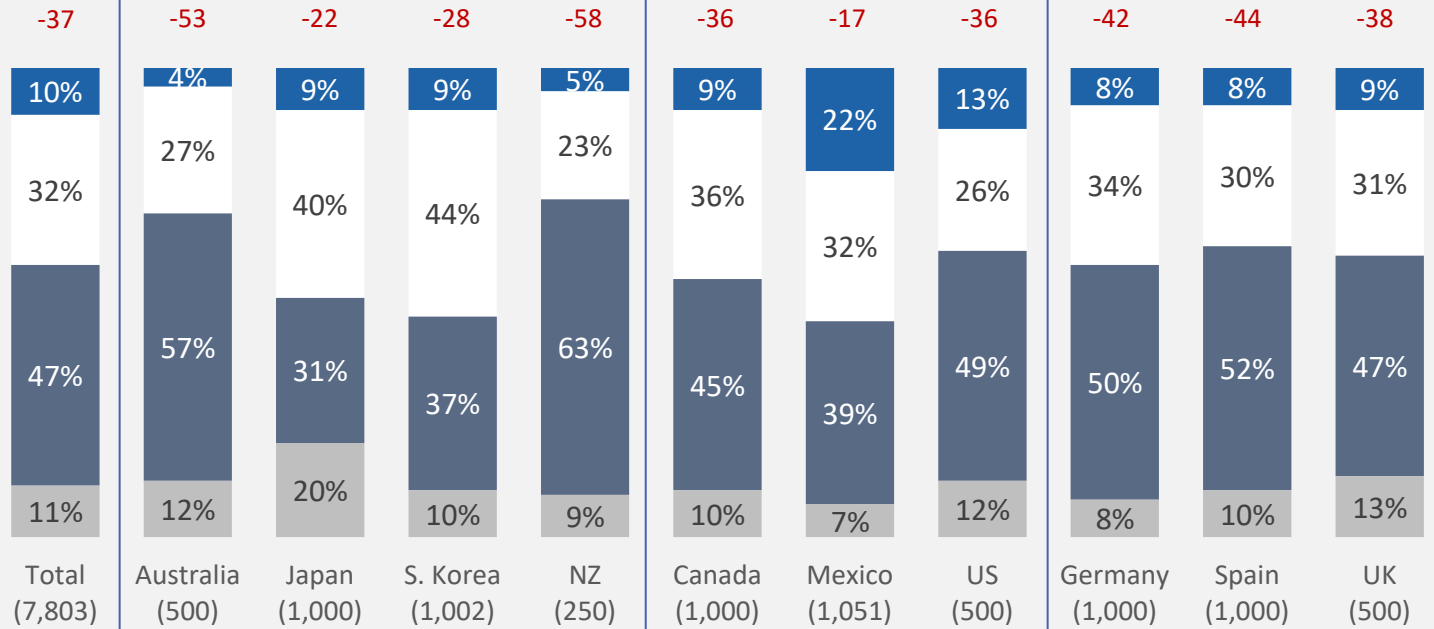
Net Trust Index = % Increase Trust − % Decrease Trust

†Scores are an average across the 5 uses of AI by market research companies
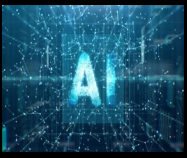
Levels of trust for each use of AI is consistent within each country.

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

Net Trust Index

2024

	Increase Trust	No Impact	Decrease Trust	Don't Know	Net Trust Index 2024
The use of AI programs for analyzing my responses in general	11%	37%	41%	11%	-30
The use of AI chatbots/avatars to interview me on general topics	9%	34%	47%	10%	-38
The use of AI programs for analyzing any sensitive information I give in my responses	10%	30%	48%	12%	-38
The fact that they may be using AI to collect and analyze my data	9%	32%	48%	11%	-39
The use of AI chatbots/avatars to interview me on sensitive topics	9%	28%	52%	11%	-43

■ Increase Trust □ No Impact ■ Decrease Trust ■ Don't Know

Net Trust Index = % Increase Trust – % Decrease Trust

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People are, on average, negative about how the use of AI by market research companies impacts trustworthiness.

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

Net Trust Index

	Total	Australia	NZ	US	UK
Net Trust Index	-16	-20	-25	0	-19

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

	Total (1,760)	Australia (503)	NZ (251)	US (506)	UK (500)
Increase Trust	17%	14%	13%	27%	16%
No Impact	36%	37%	34%	35%	36%
Decrease Trust	33%	34%	38%	27%	35%
Don't Know	14%	15%	15%	11%	13%

Net Trust Index = % Increase Trust − % Decrease Trust

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

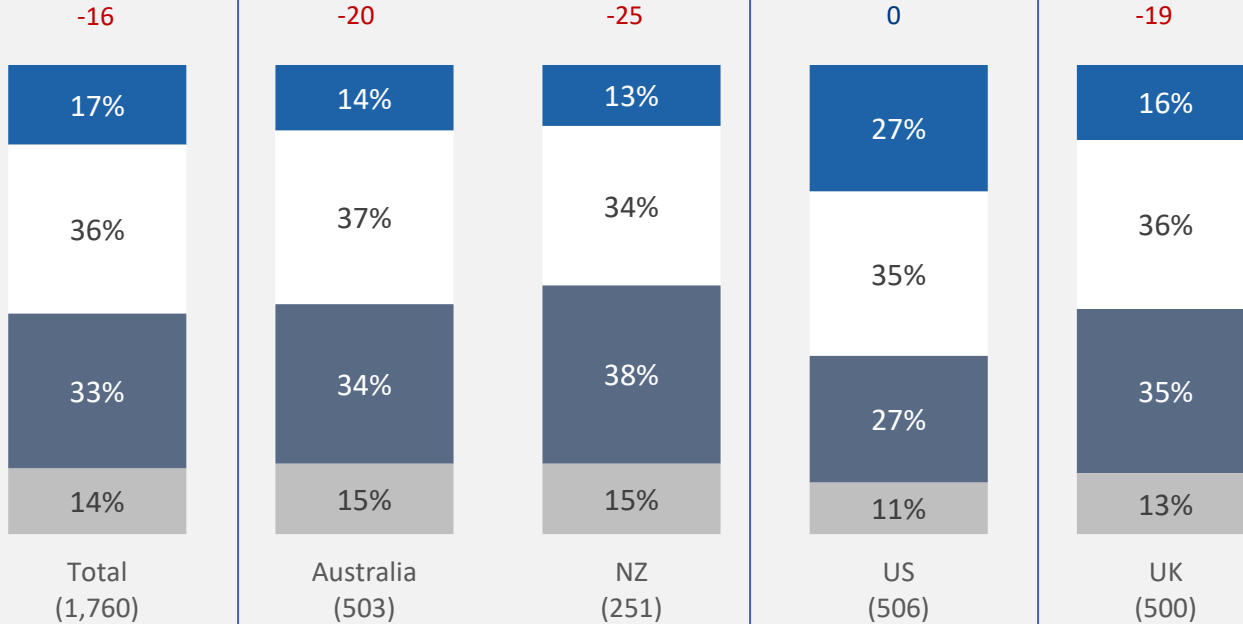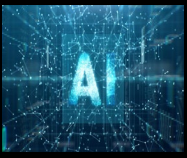This perceived distrust extends to all claimed benefits, particularly the use of AI chatbots or avatars during interviewing.

Levels of Trust in Benefits of Using AI Claimed by Companies

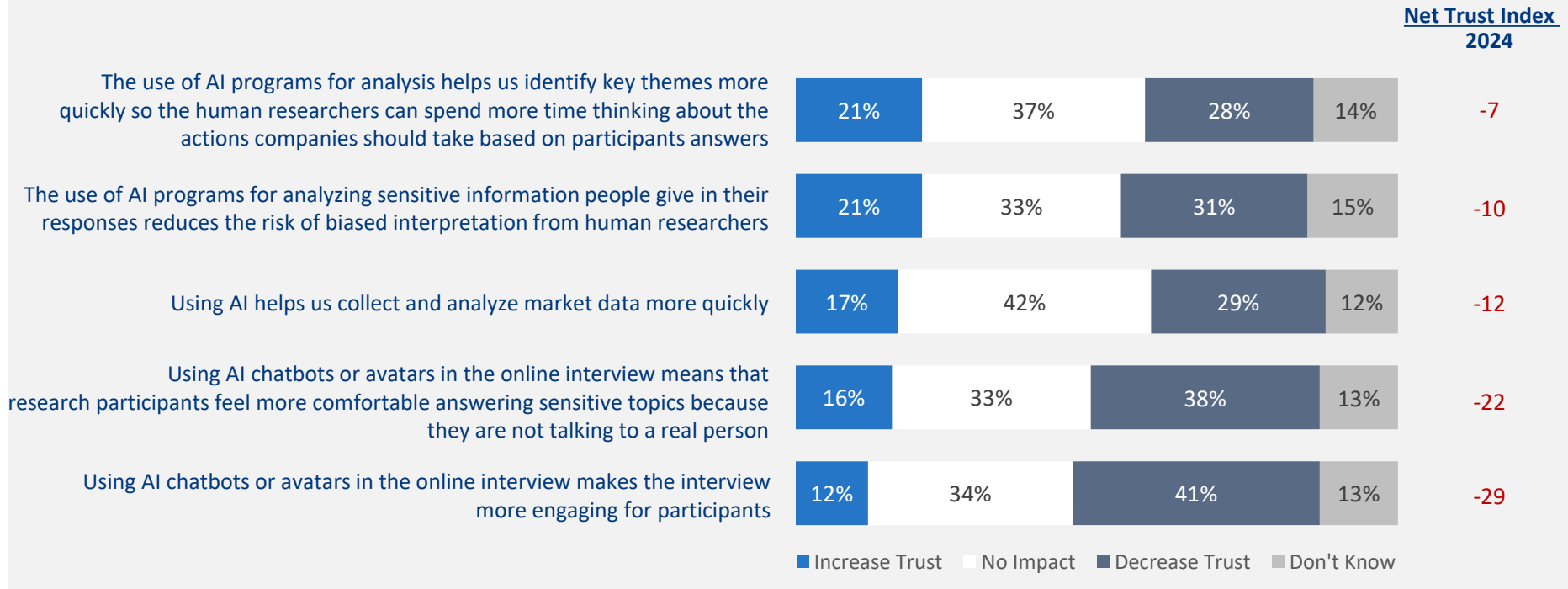|	Increase Trust	No Impact	Decrease Trust	Don't Know	Net Trust Index 2024
The use of AI programs for analysis helps us identify key themes more quickly so the human researchers can spend more time thinking about the actions companies should take based on participants answers	21%	37%	28%	14%	-7
The use of AI programs for analyzing sensitive information people give in their responses reduces the risk of biased interpretation from human researchers	21%	33%	31%	15%	-10
Using AI helps us collect and analyze market data more quickly	17%	42%	29%	12%	-12
Using AI chatbots or avatars in the online interview means that research participants feel more comfortable answering sensitive topics because they are not talking to a real person	16%	33%	38%	13%	-22
Using AI chatbots or avatars in the online interview makes the interview more engaging for participants	12%	34%	41%	13%	-29

■ Increase Trust □ No Impact ■ Decrease Trust ■ Don't Know

Net Trust Index = % Increase Trust – % Decrease Trust

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