



Global Trust Survey 2024

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

Focus on Japan

April 2024





Table of Contents

Read Me: I'm Important	3
Introduction	4
Partners	5
Thought Leadership	6
Background & Sample	8
Key Takeaways	10
Snapshot View of: Trust in and Impressions of Market Research	13
Level of Overall Trust	17
Believability that Market Research is Beneficial	29
Reactions to the Participant Experience	41
Personal Data Use	47
Protection & Use of Personal Data	55
Drivers of Trust in Market Research to Protect & Appropriately Use Personal data	67
How AI Has Impacted the Level of Trust	77



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 – Neil Cante, Rakuten Insight

BUILDING TRUST

For a reputable panel company, gaining and maintaining trust from all stakeholders, clients and panel members, is and has always been critical. In 2024, the presence of AI continues to grow. In our daily lives, proving our humanity when making an online purchase has become the norm. So, it is little wonder that the humanity of market research data is also questioned. As AI grows more sophisticated, so do the defences against the bots in an endless game of cat and mouse. In this context, Rakuten Insight will take an in-depth look at how reputable panel companies gain and maintain trust, not just from the client point of view but also from the point of view of panel members who complete surveys.

For a panel company, securing and maintaining the trust of panel members is critical to the business. Without trust, there would be no members to complete research surveys. In Japan, trust is particularly difficult to gain and easy to lose. There is a cultural mix of high expectations, high attention to detail and one of the most sophisticated customer service markets in the world. As such, panel companies operating in Japan have developed and adopted many actions into daily workflows to maintain trust.

In Japan, prior to registration, the panel company's brand name is the first point of reassurance. It is a common goal for research agencies to get their brand name into the mainstream media. This brand name provides panel members with enough trust to take the first step. Registration then offers panellists double opt-in as well as clear communication of how their personal data will be protected and used. Japanese consumers generally appreciate this additional reassurance on what they can expect by being a member, what incentives they can expect and how those incentives can be used. There is a cultural expectation to be provided with more information rather than less. The additional information reassures more than if the information is quick and easy to understand. Once a member has signed up to a panel, it is essential that promises are adhered to and expectations are met, in order to maintain the trust.

The next key touchpoint in maintaining the trust of panel members is when they are invited to take a survey. Prior to any survey being conducted, reputable panel companies usually send a message to panellists so the member always knows the survey topic and the incentive they will receive. In addition, the survey is always checked prior to being sent to members, so that, if required, any message can be tailored.



Thought Leadership – Neil Cante, Rakuten Insight

For example, panel members would be alerted to any surveys which contain questions on sensitive topics, political viewpoints or data privacy. These messages maintain a neutral tone to avoid any influence on the data, but the messages are key in showing the company cares and building trust.

Once entering the survey, translation is key for panel members in Japan. Badly translated questionnaires can damage trust, providing the image that the company does not care what content goes before members. As such, locally based project managers review translations to ensure that surveys sent to panel members give not only the right meaning of the original but also the best impression of the professionalism of the company.

After the survey is completed, reputable panel companies help panel members in Japan to feel able to share any questions or concerns. Dealing with these inquiries, locally, speedily and professionally is critical to maintaining their trust.

Following the collection of the data, AI is increasingly used to ensure that the data is of the highest quality. As the attacks on the

humanity of the data increase, so do the sophistication of the defences. Available security technologies, as elsewhere, are employed in Japan to ensure the highest quality of data is provided to clients. Gaining and maintaining the trust of clients is essential.

In conclusion, trust is critical for reputable panel companies in Japan. Not only in terms of provision of quality data but also in terms of gaining and maintaining the trust of panel members, who are the basis of the research findings and of the actions that companies and brands take based on that data.

Neil Cante – Rakuten Insight



Rakuten Insight



Background & Sample

- The primary objective of the research is to understand the level of trust the general public has in the market research industry across the globe, both overall and specifically when it comes to the handling of personal data.
- The secondary objective is to understand more broadly how trust in different types of organizations and bodies compares across the globe.
- Fieldwork was conducted between the 12th and 24th of February 2024.
- The report compares the results for 2024 to the 2022 Global Trust Survey, fieldwork for which was conducted in July 2022. Trended data is shown throughout the report, many times reported as the +/- in percentage point change in the 2024 data vs. 2022 data.

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

- Version 1 asked respondents first about trust with personal data and has been used to report on questions relating to personal data
- Version 2 asked respondents first about overall trust and has been used to report on questions relating to overall trust, as well as the perceived benefit of market research
- Versions 1 and 2 combined were used to report on questions relating to the market research experience
- The sample has been designed to be representative of the population aged 18+ in each country, split 50%/50% into two cells, with each cell balanced by quotas.
- The countries covered and the sample provider responsible in each country are shown on the following page.



Background & Sample (Cont'd)

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

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

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

KEY TAKEAWAYS





Key Takeaways

- ✓ Consumer trust in market research companies remains average in Japan 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.
- ✓ The survey experience can still be improved for Japan consumers, in particular by decreasing the length of surveys.
- ✓ There continues to be widespread distrust in how industries, including market research, handle personal data.
 - A lack of knowledge about data privacy practices drives this doubt.
- ✓ Japan 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.
 - While trust in **market research companies** is still negative in Japan, it slightly rebounded.
 - Negative perceptions of **data analytics companies** persist worldwide.
 - 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.
 - 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.
 - 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**

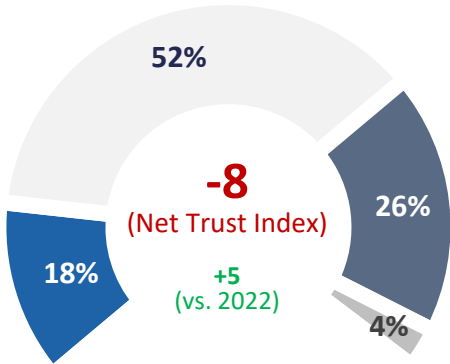




Trust in market research companies remains negative overall and for the ability to protect and appropriately use personal data. That said, overall trust is on the rise vs. '22.

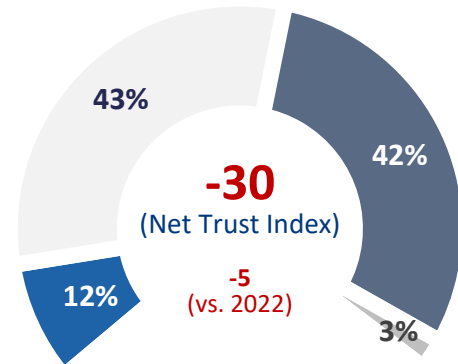


Overall Trust of Market Research Companies



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 9th of 15)

Personal Data Trust Net Trust Index (NTI): Across the 15 industries/organizations analyzed, the average NTI was -18 (Market Research companies ranked 12th of 15)

Base: Version 1 Respondents (500)

Base: Version 2 Respondents (500)

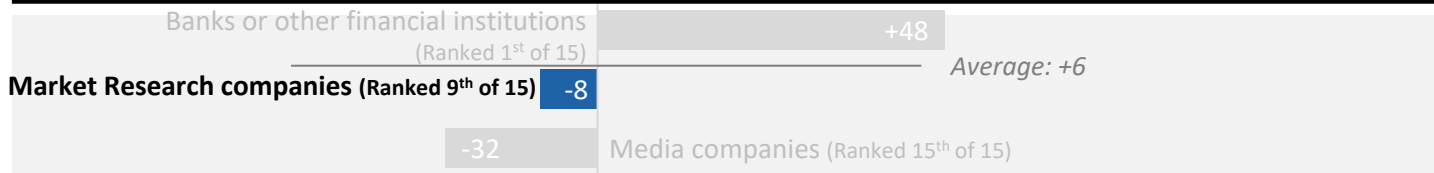


Relative to other industries, market research companies rank in the middle on perceived trust overall but drop lower when it comes to trusting the use of personal data.

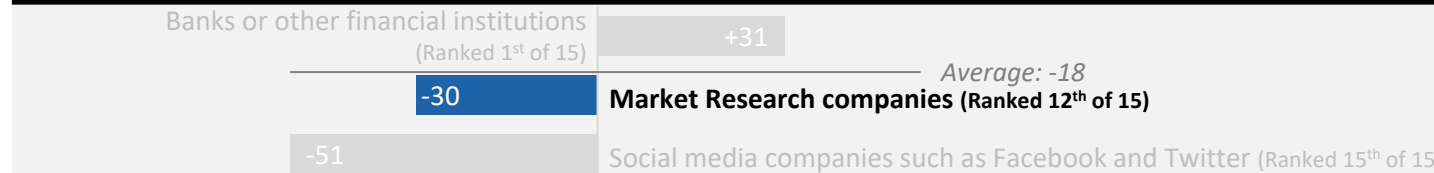


Japan

Overall Trust of Market Research Companies – Net Trust Index



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



Net Trust Index = % Trust – % Do Not Trust



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



Japan

17%

(No Change vs. 2022)

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

31%

(-6% vs. 2022)

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

11%

(-2% vs. 2022)

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

29%

(+11% vs. 2022)

of consumers **believe** market research **benefits them**

Appropriate = 5-Completely Appropriate/4

Concerned = 5-Completely Concerned/4

Informed = 5-Completely Informed/4

Benefits = 5-Benefits Completely/4

Base: Version 1 Respondents (500)

Base: Version 2 Respondents (500)

**LEVEL OF
OVERALL TRUST**

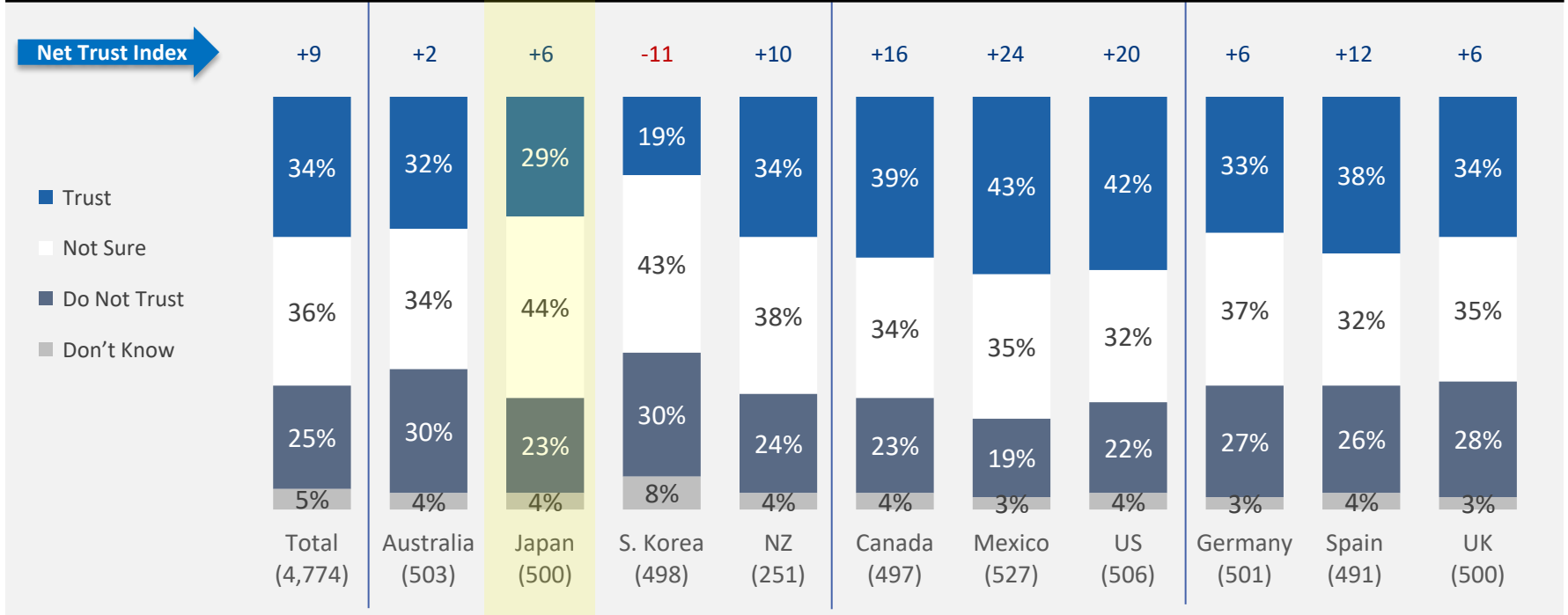




While there's a foundational level of trust in organizations/professionals around the world, most countries also exhibit a sizeable level of distrust. In this respect, Japan is right around the global average.



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 Japan.

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.

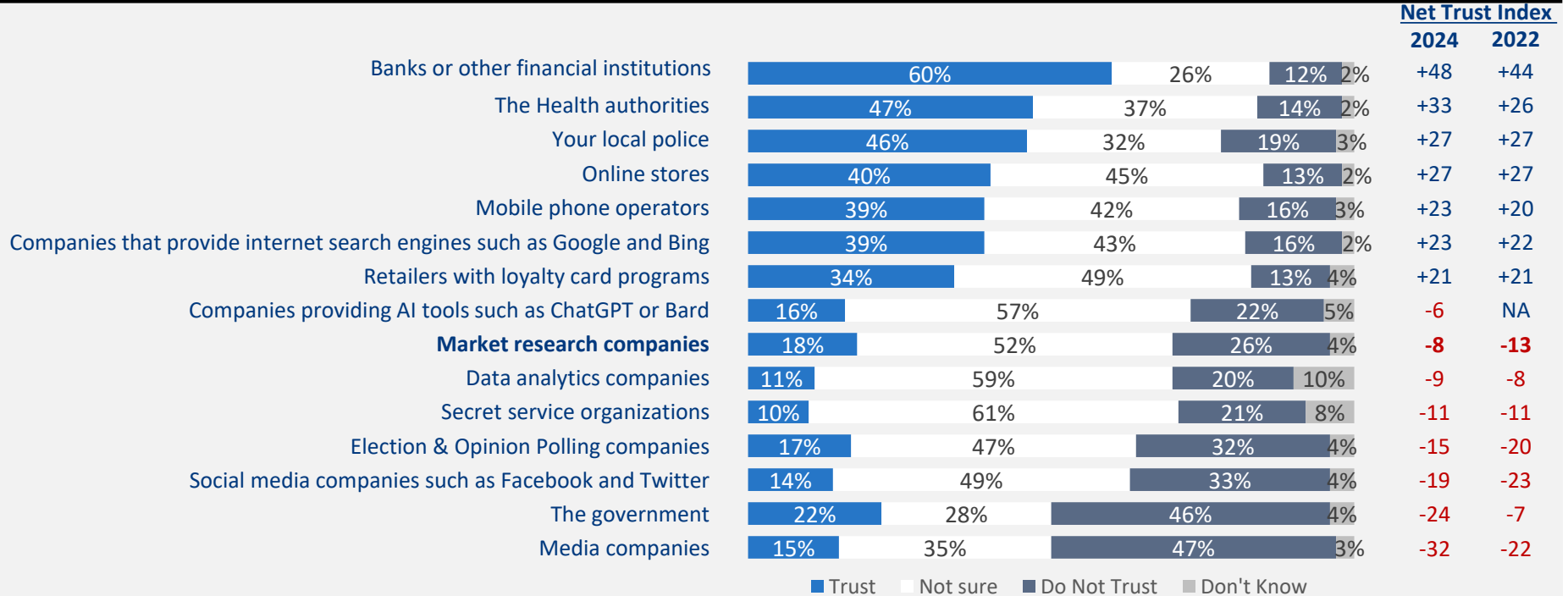
†Scores are an average across the 15 industries/organizations analyzed



Consumers in Japan once again place the most trust in financial institutions, whereas the government and media companies incur the most doubt. Market research companies rank in the middle.



Level of Trust by Organizations/Professionals



Net Trust Index = % Trust – % Do Not Trust

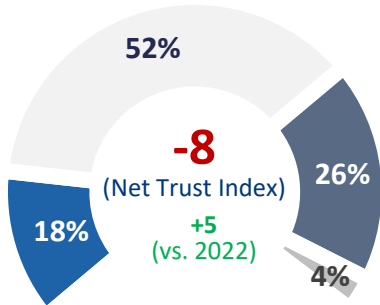


While trust perceptions remain negative in Japan across the “insights space,” trust in market research and election & polling companies is on the rise.

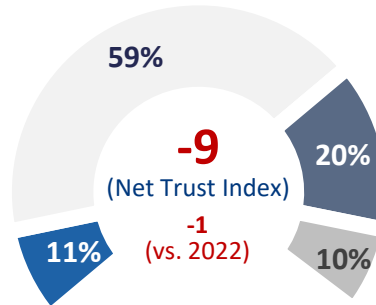


Japan

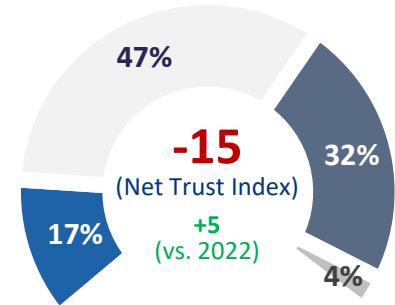
Trust in Market Research



Trust in Data Analytics



Trust in Election & Opinion Polling



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

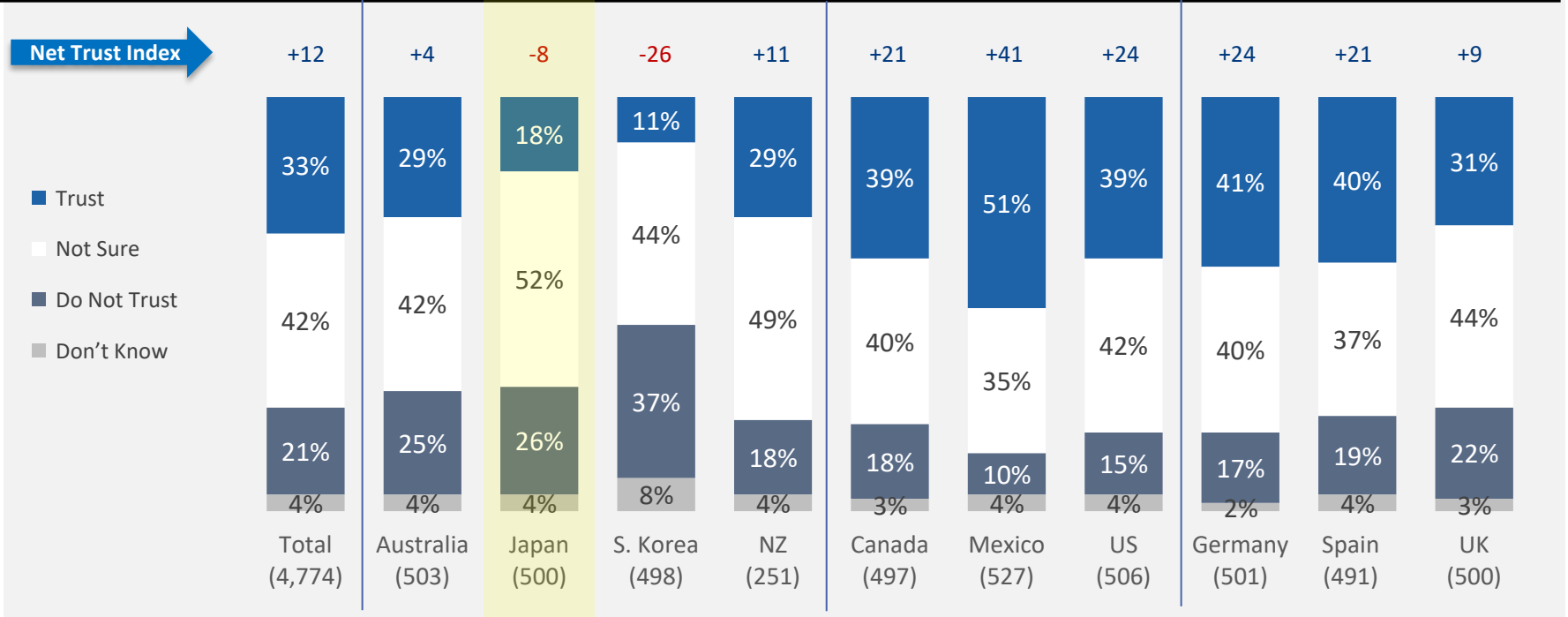
Net Trust Index = % Trust – % Do Not Trust



Trust in market research companies varies greatly by country but leans positive overall. 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.



Trust in Market Research













Net Trust Index = % Trust – % Do Not Trust



While net trust in this regard is still negative, Japan rebounded slightly vs. 2022.

Trust in Market Research - Trended to 2022

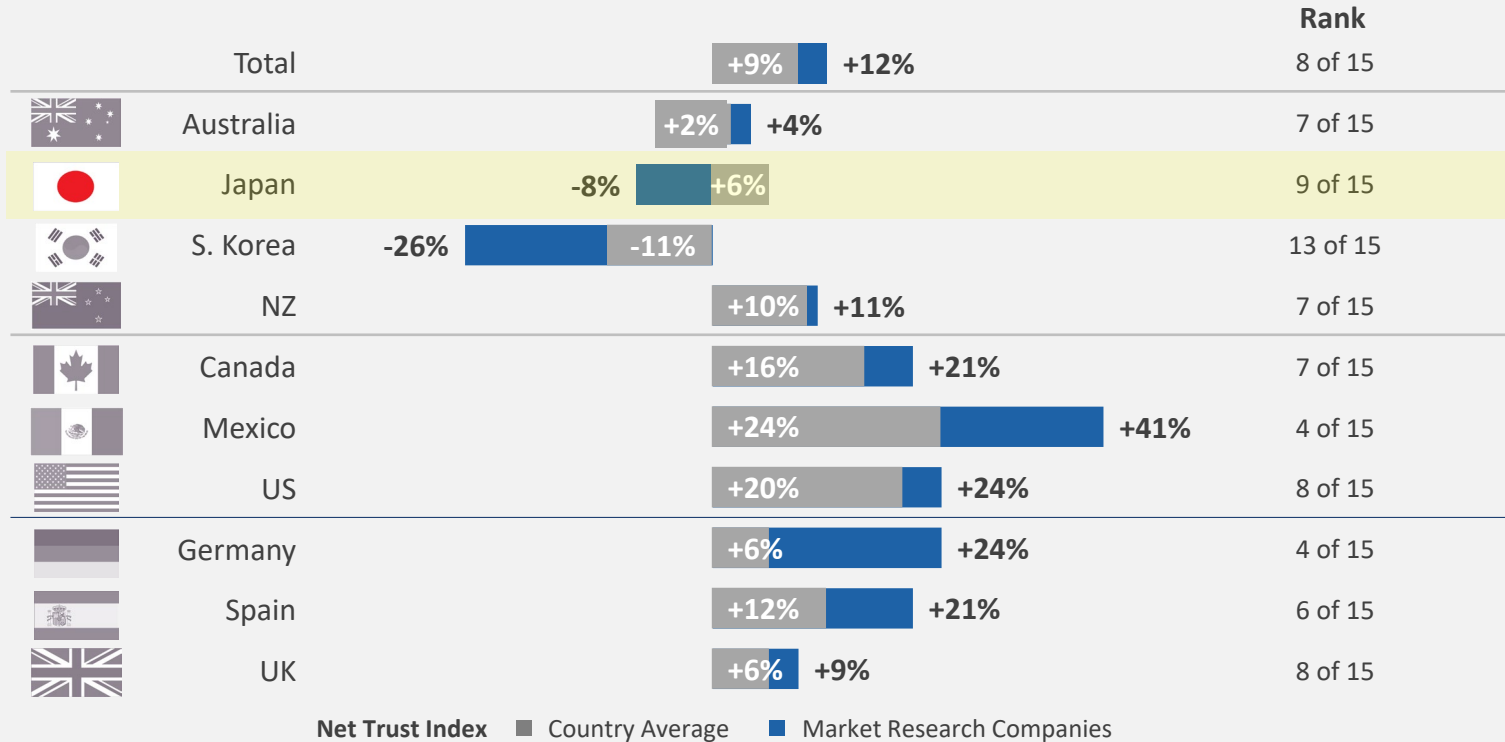
	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
 Net Trust Index	2024	+7	+4	-8	-26	+21	+24	+24	+9
	vs. 2022	--	-3	+5	-14	+3	+2	+2	+1
 % Trust	2024	30%	29%	18%	11%	39%	39%	41%	31%
	vs. 2022	+1%	--	+3%	-2%	+3%	+2%	+5%	-2%
 % Do Not Trust	2024	23%	25%	26%	37%	18%	15%	17%	22%
	vs. 2022	+2%	+4%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

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



Trust in market research typically ranks in the middle of the pack globally.

Trust in Market Research (vs. Country Average)



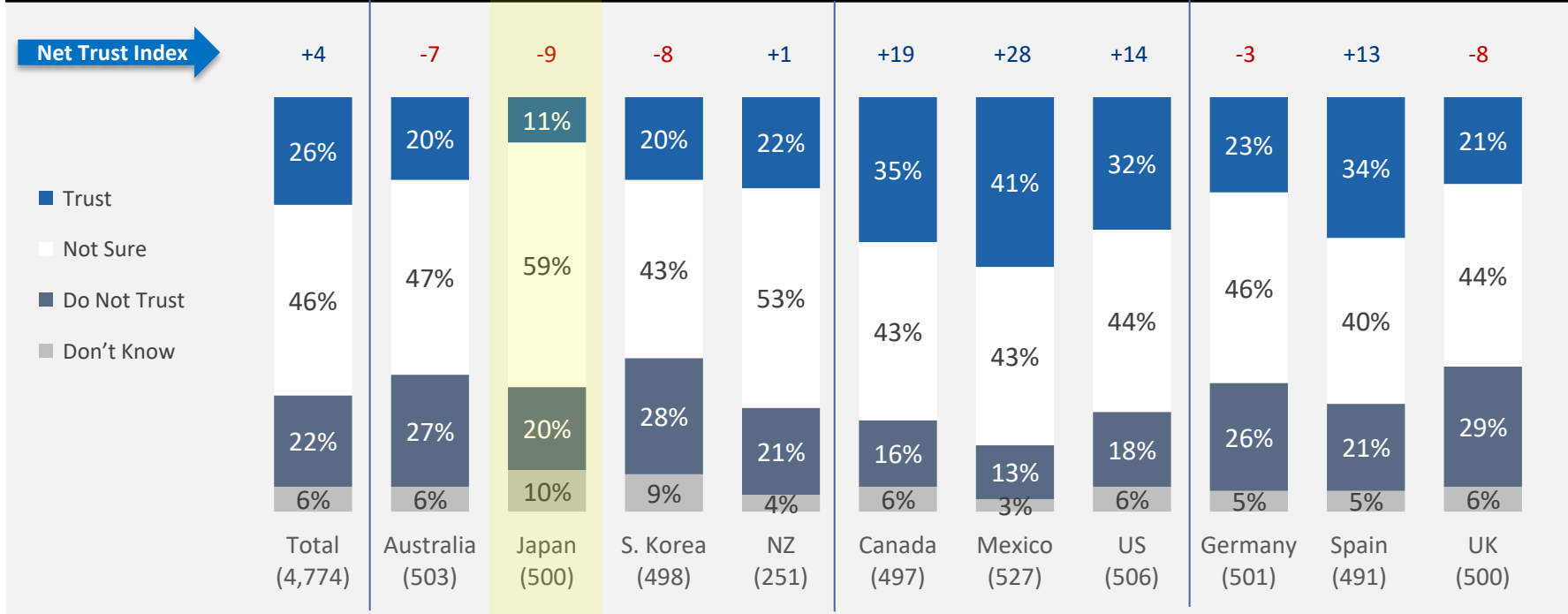
Net Trust Index = % Trust – % Do Not Trust



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



Trust in Data Analytics










Net Trust Index = % Trust – % Do Not Trust



Net perceptions for trust in data analytics in Japan are still negative.

Trust in Data Analytics - Trended to 2022

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

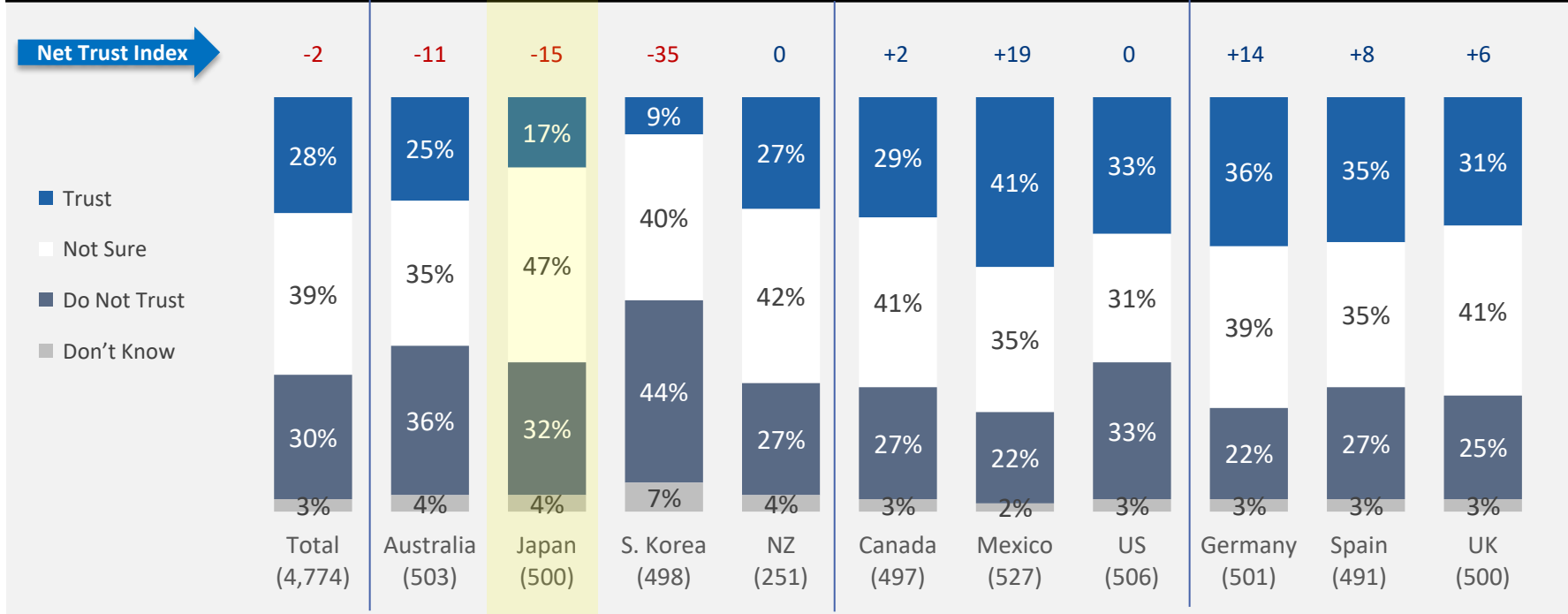
Net Trust Index = % Trust – % Do Not Trust
*Total based on comparable countries across waves.



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



Trust in Election & Opinion Polling










Net Trust Index = % Trust – % Do Not Trust



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

Trust in Election & Opinion Polling - Trended to 2022

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





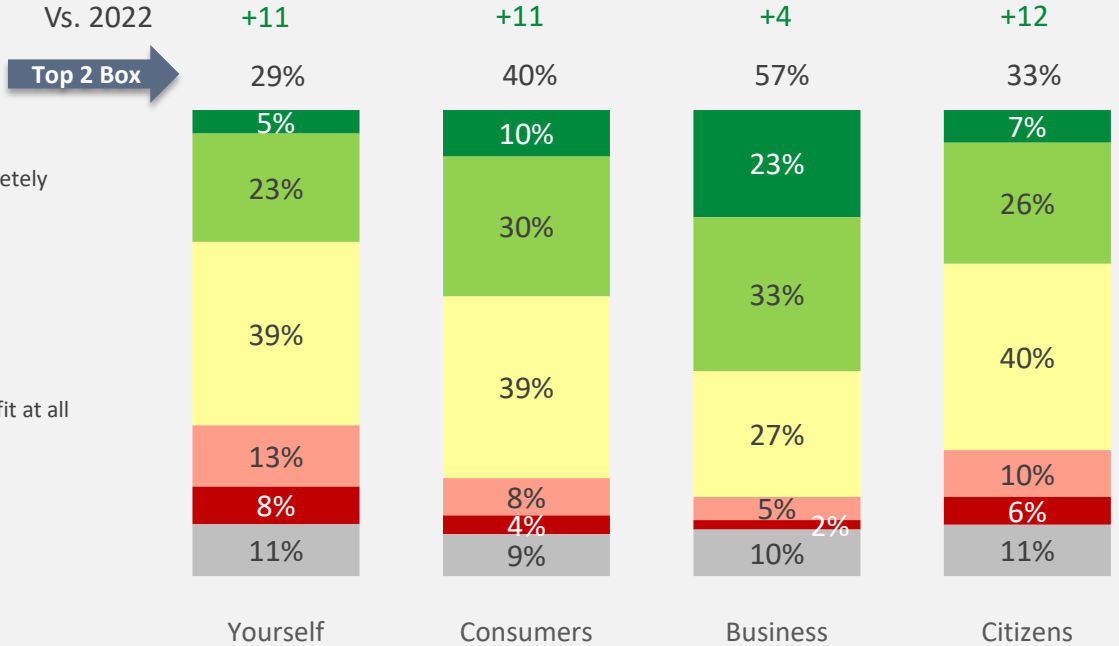
The value of market research is once again more apparent for businesses than for individuals, though the perceived benefit increased for the latter.



Extent Market Research is Perceived to be Beneficial



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

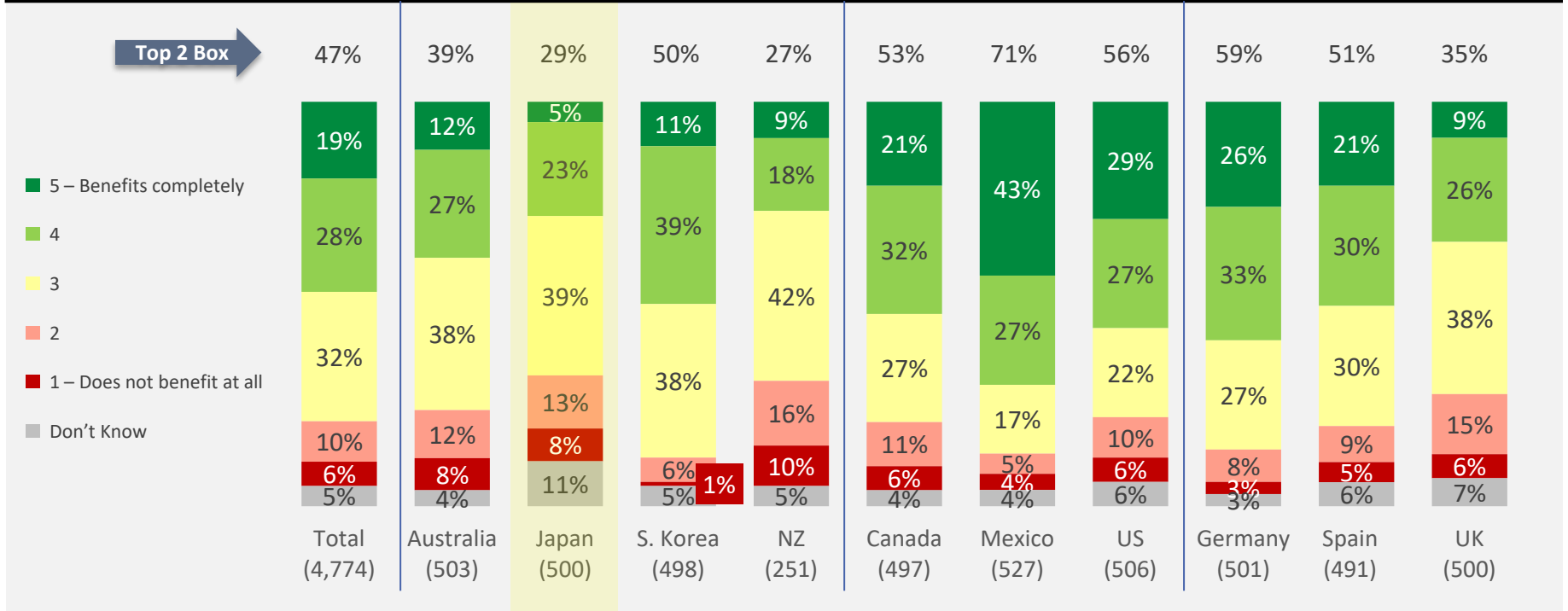




Overall, less than half feel that market research benefits them – this negative sentiment is driven by those in Australia, Japan, New Zealand, and the UK.



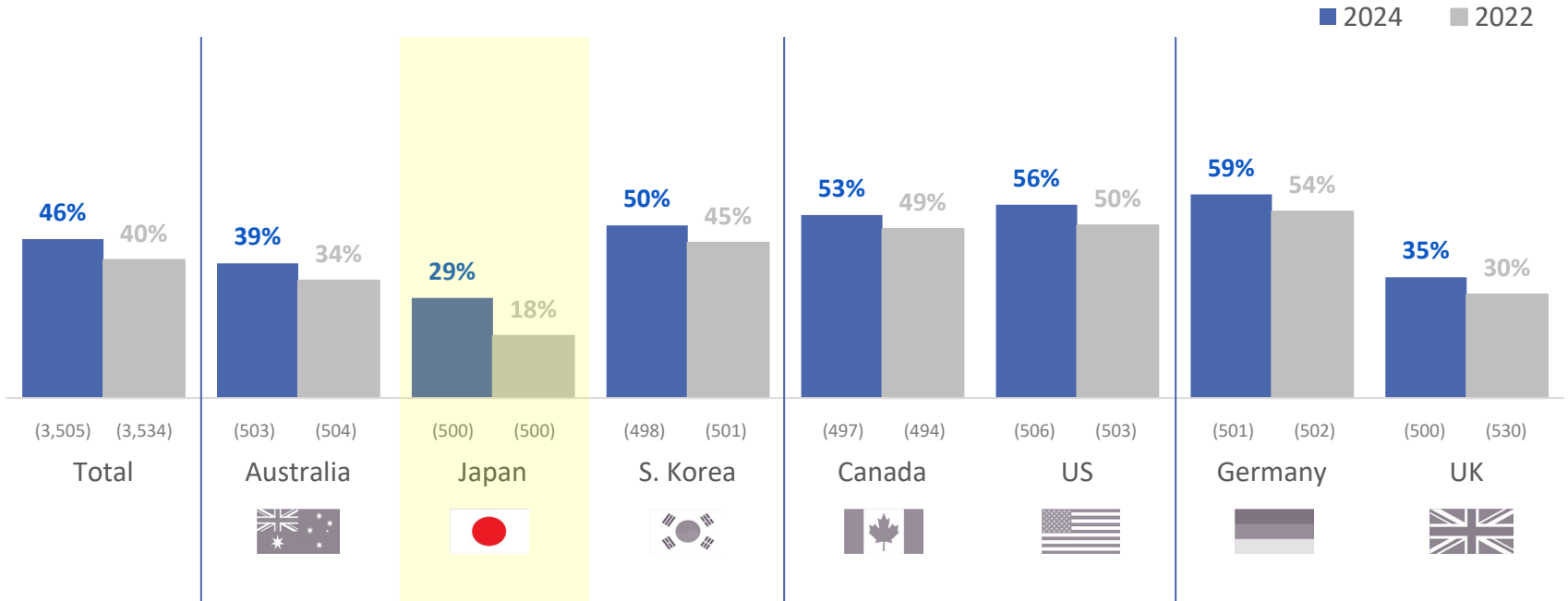
Extent Market Research is Perceived to be Beneficial to Yourself





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

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

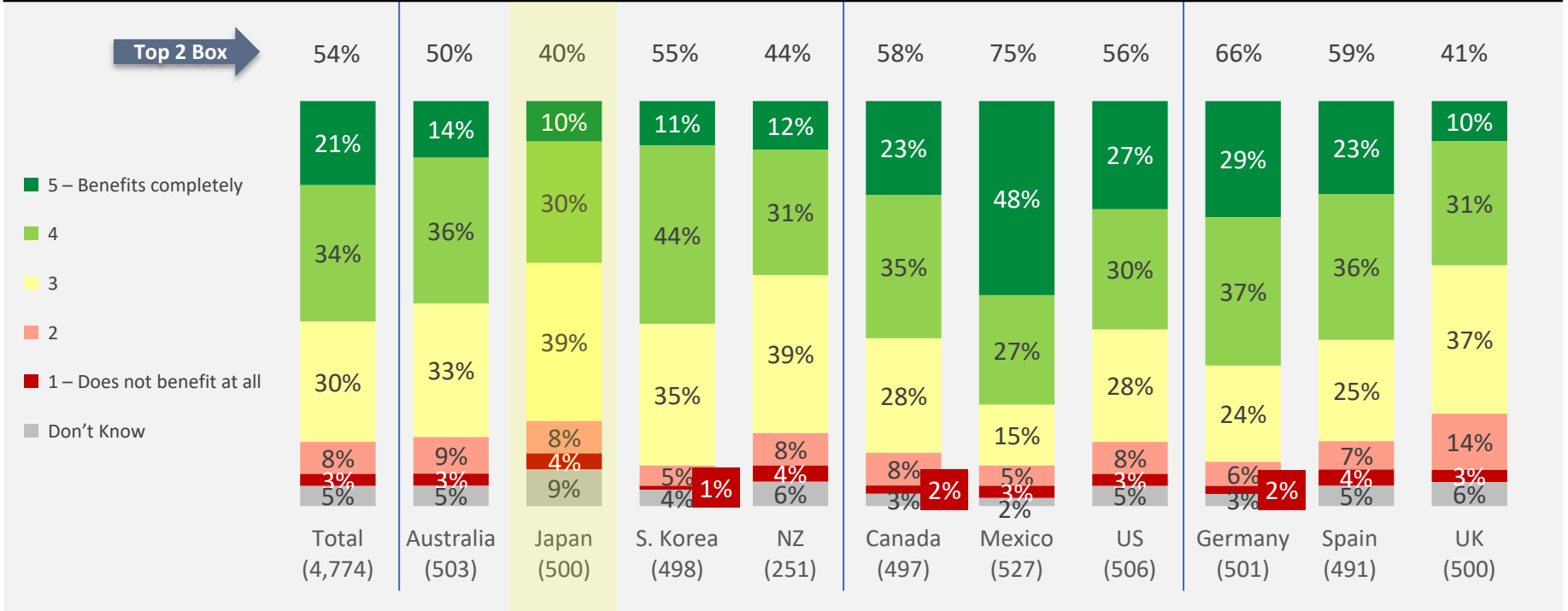




Most recognize some benefit of market research to consumers.



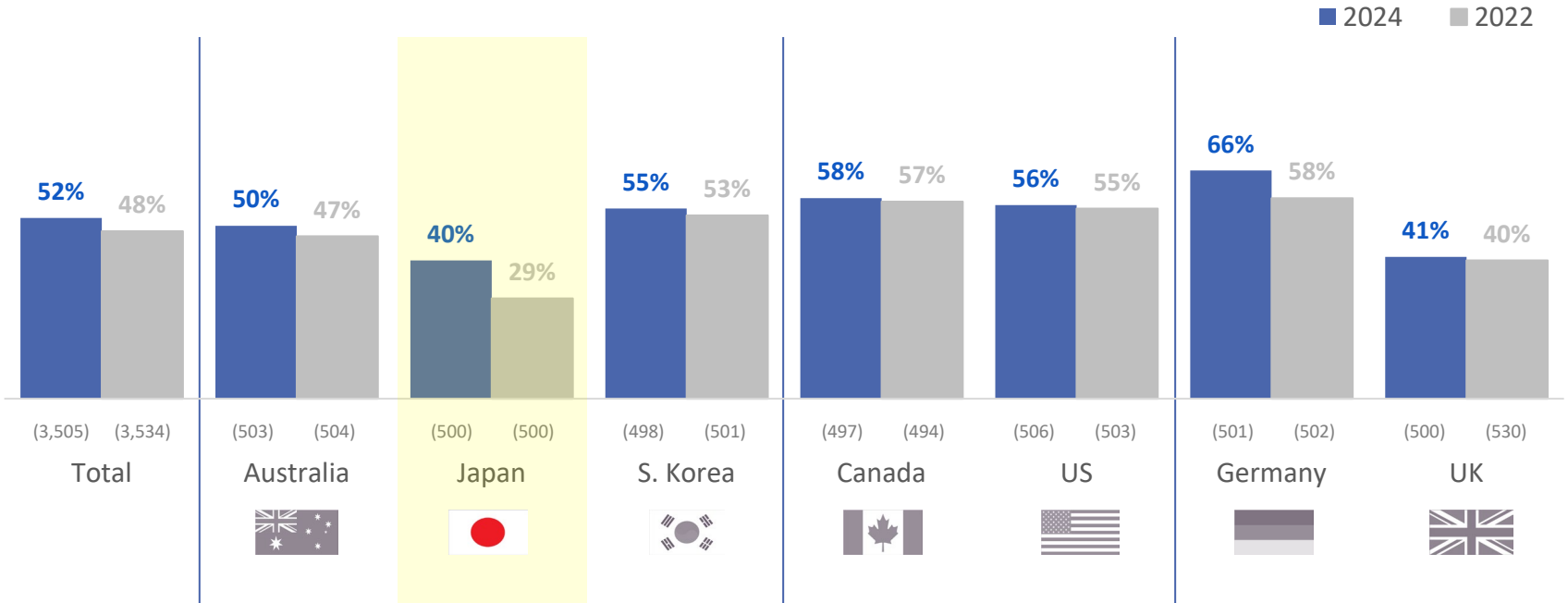
Extent Market Research is Perceived to be Beneficial to Consumers





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

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

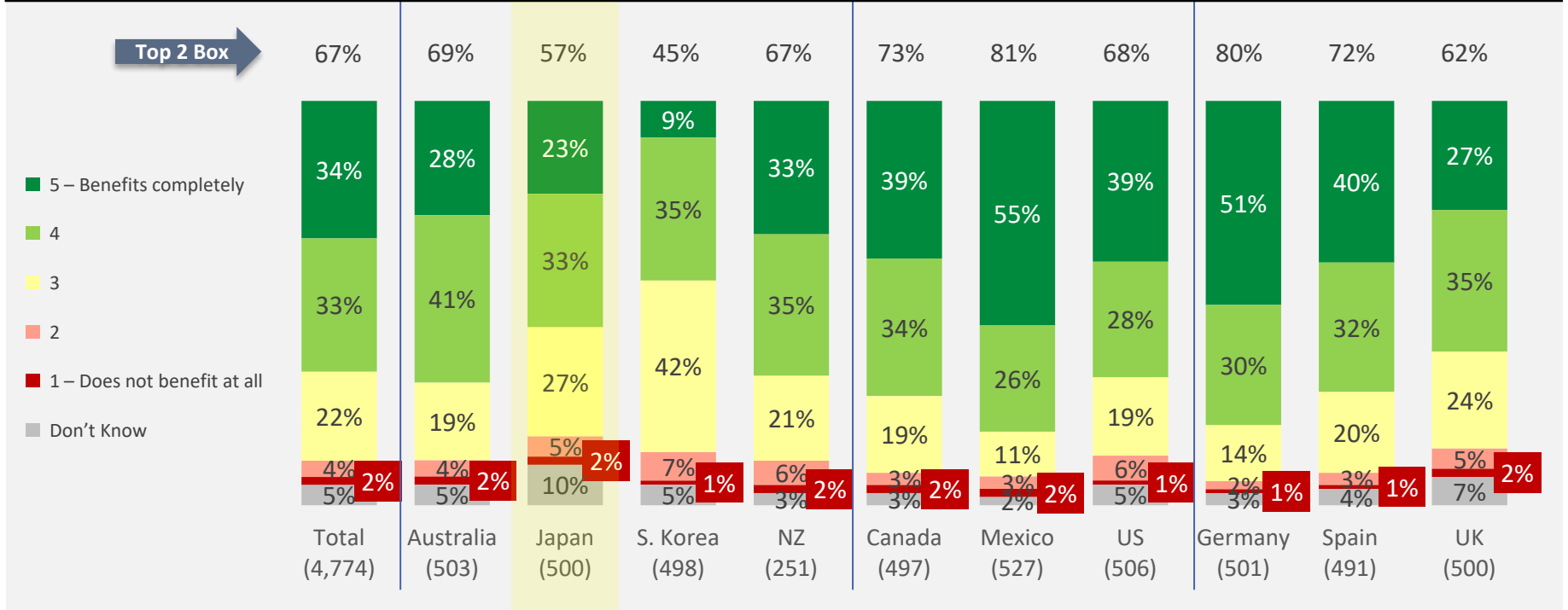




Many consider market research highly beneficial to businesses.



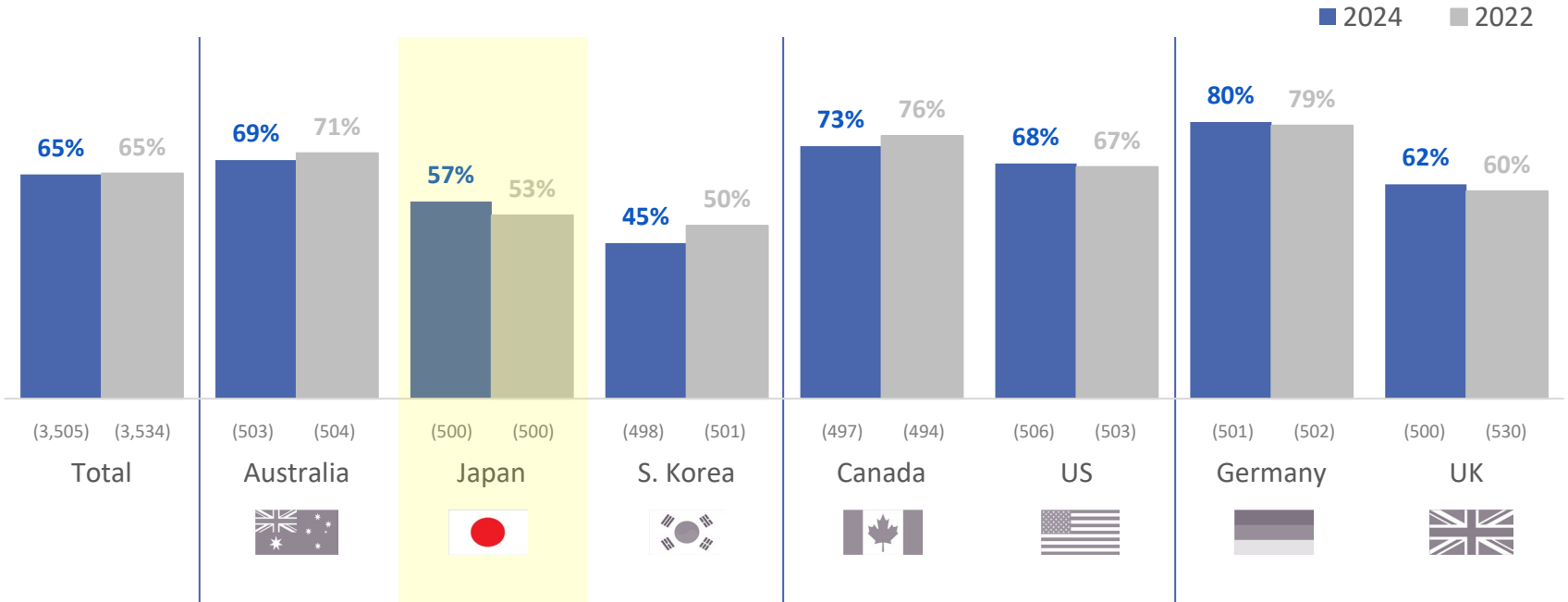
Extent Market Research is Perceived to be Beneficial to Business





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

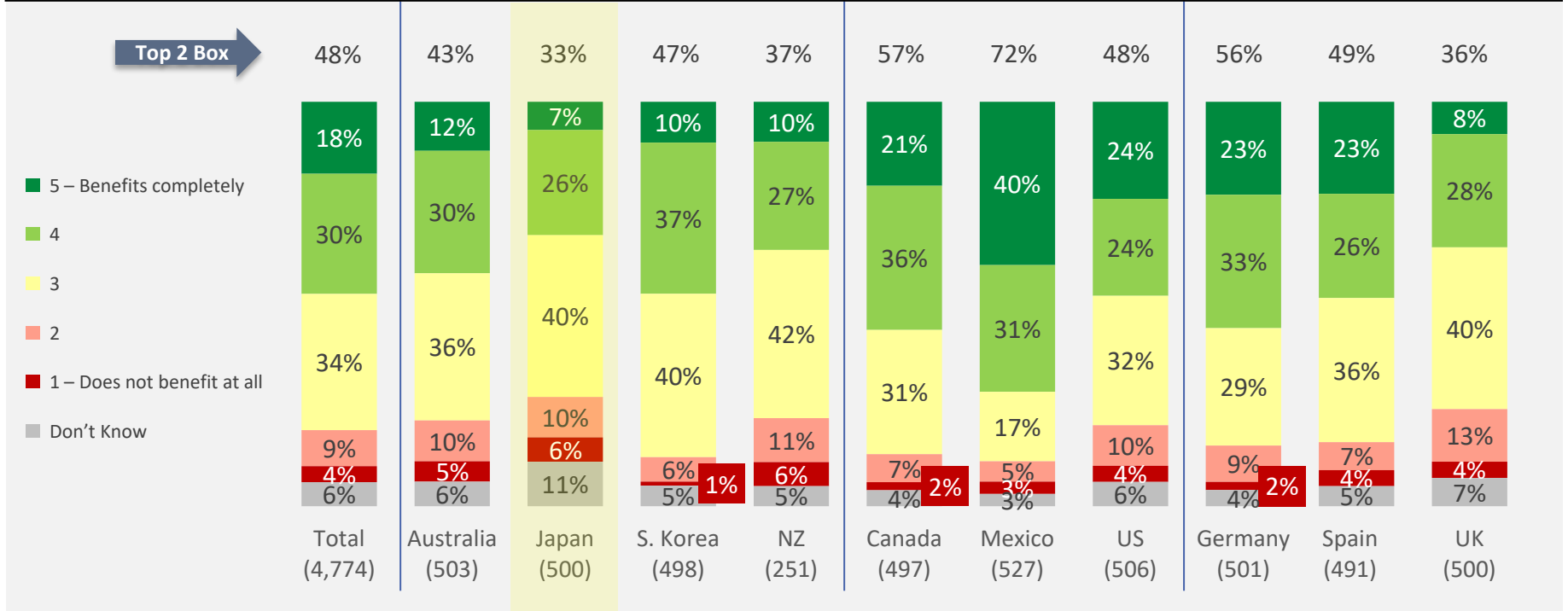




Nearly half recognize the benefits of market research to citizens, with Mexico showing the most conviction, while Japan, New Zealand, and the UK exhibit the least.



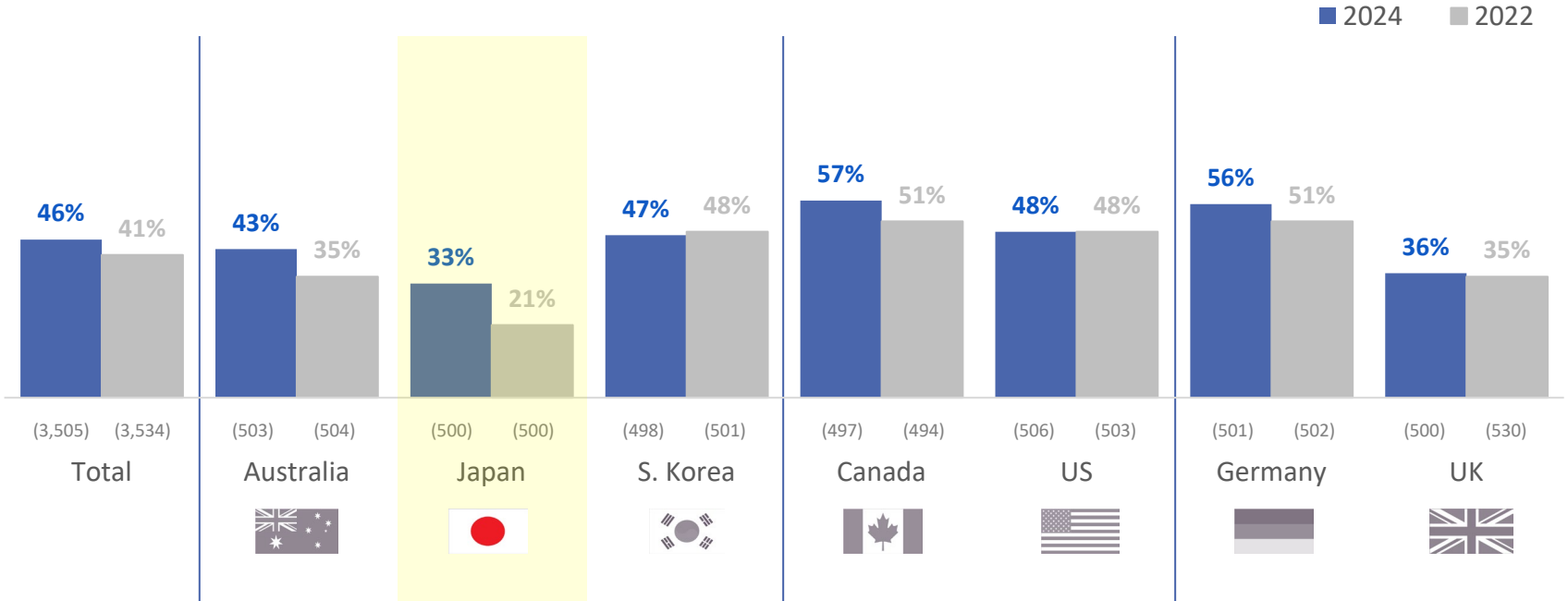
Extent Market Research is Perceived to be Beneficial to Citizens





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

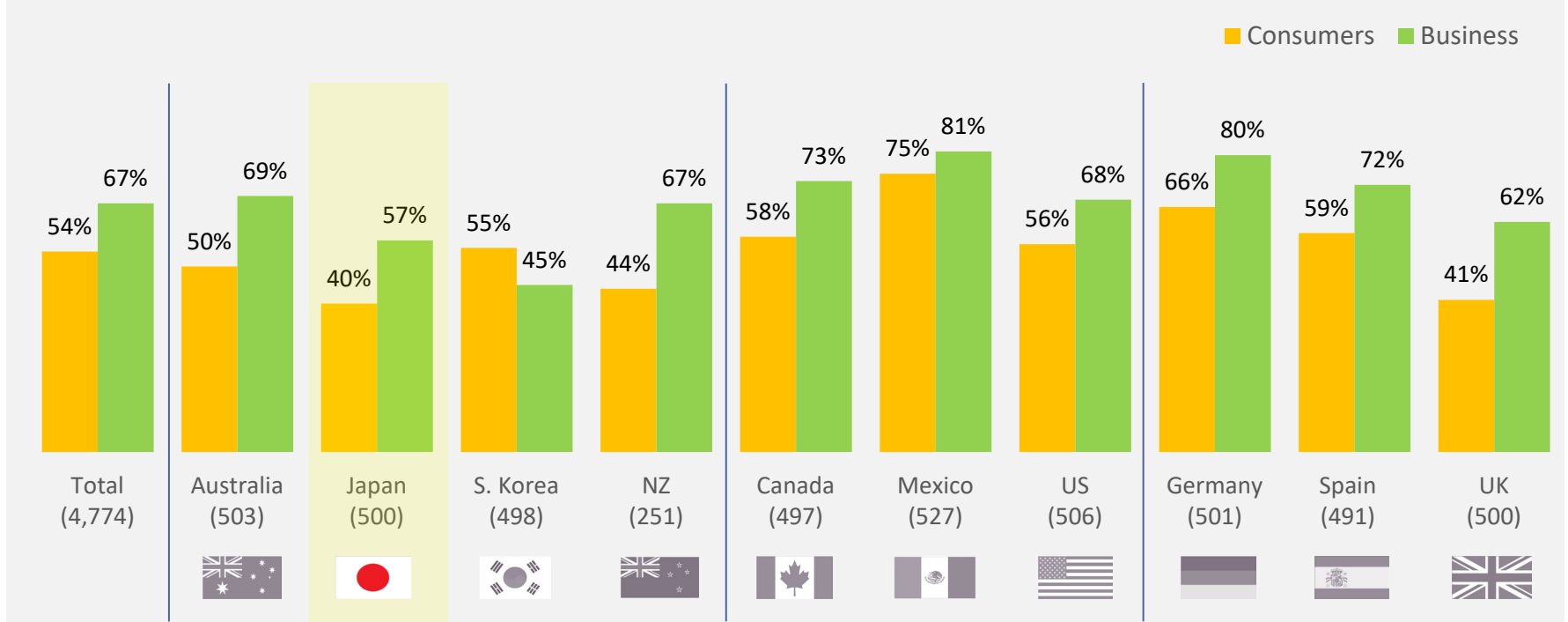
Extent Market Research is Perceived to be Beneficial to **Citizens** (Top 2 Box %) - Trended to 2022





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

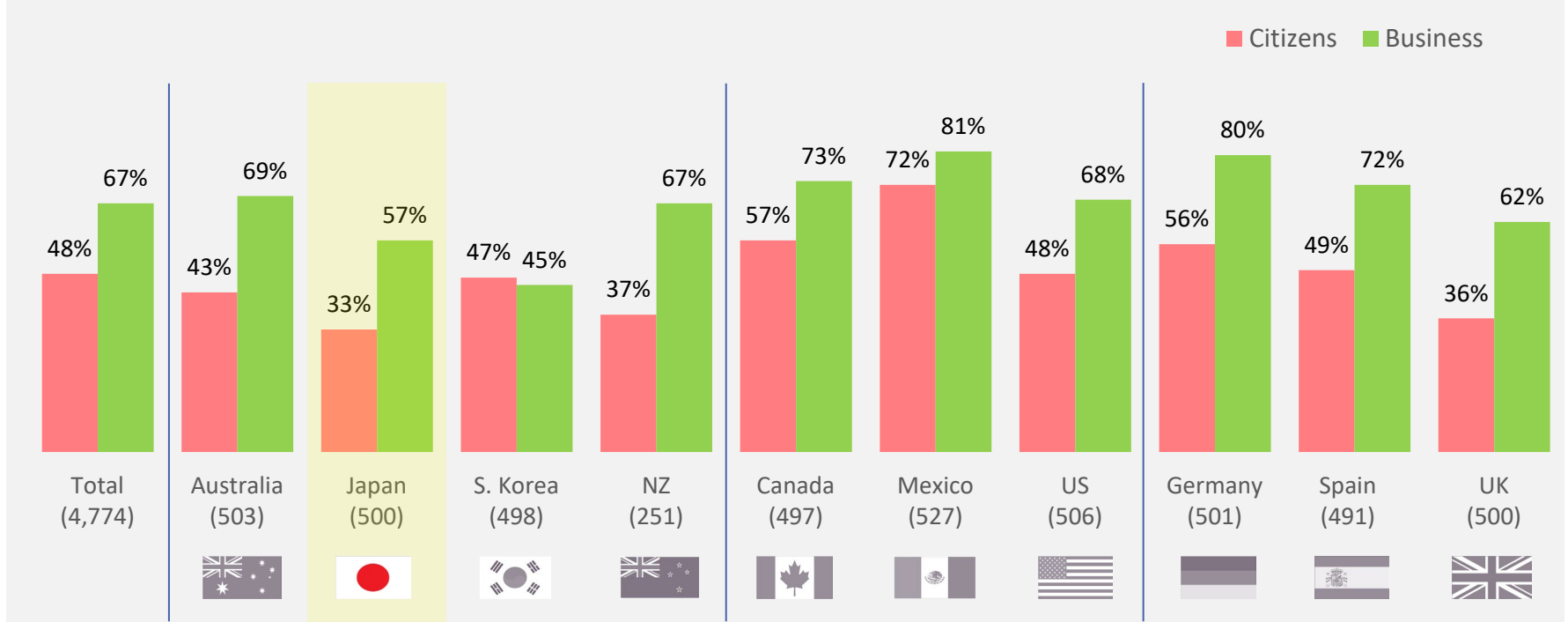
Extent Market Research is Perceived to be Beneficial to Consumers vs. Business (Top 2 Box)



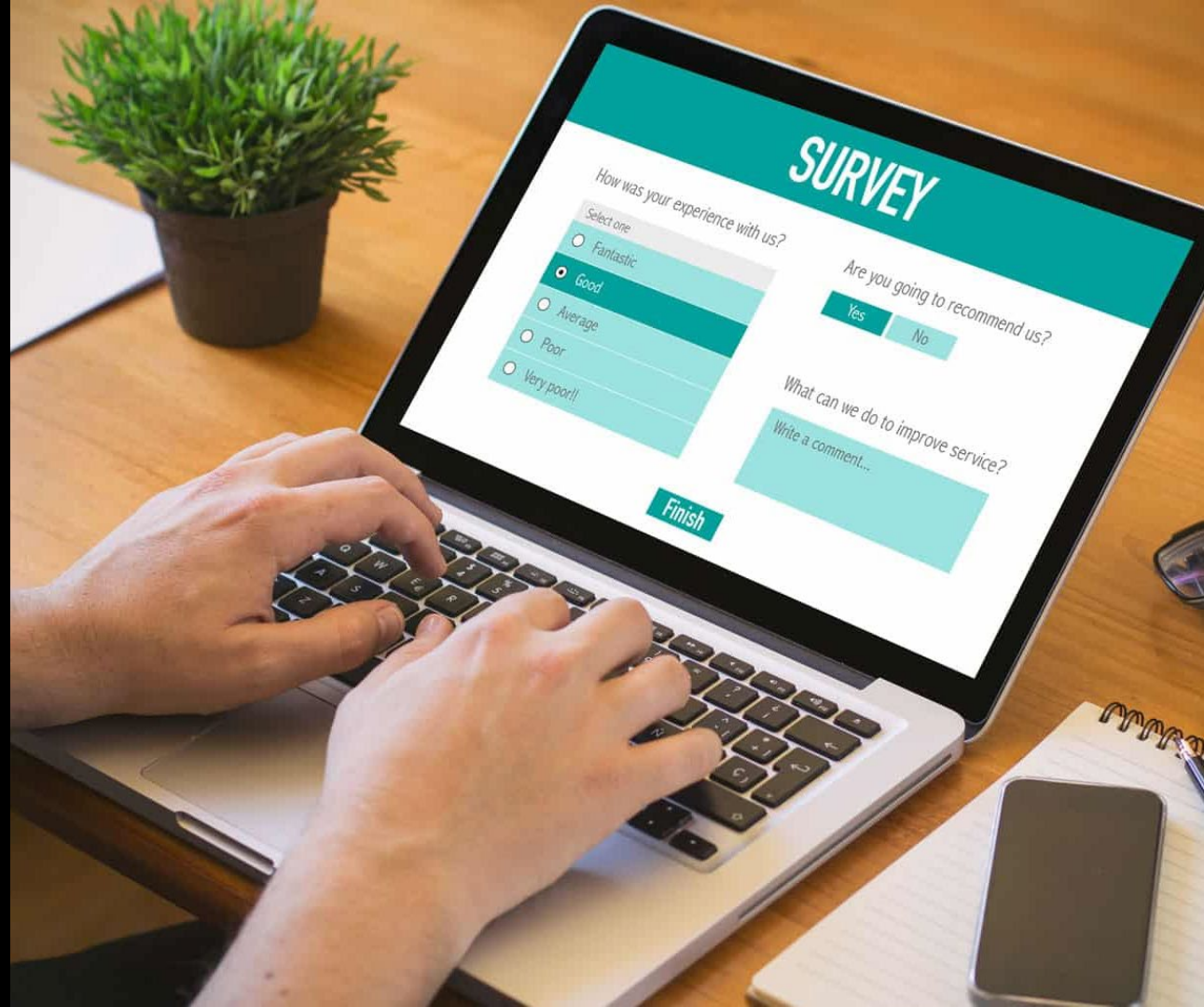


Likewise, market research is considered much more beneficial to businesses than to citizens on a global basis.

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



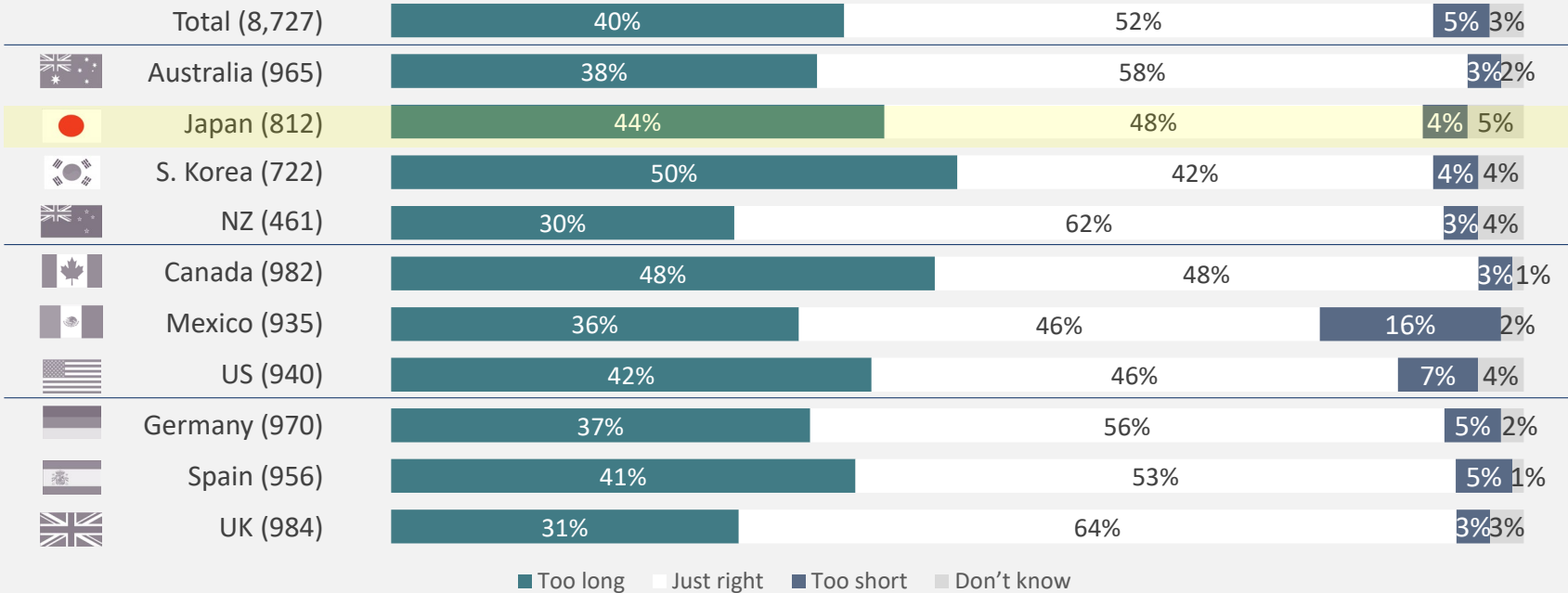
REACTIONS TO THE PARTICIPANT EXPERIENCE





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

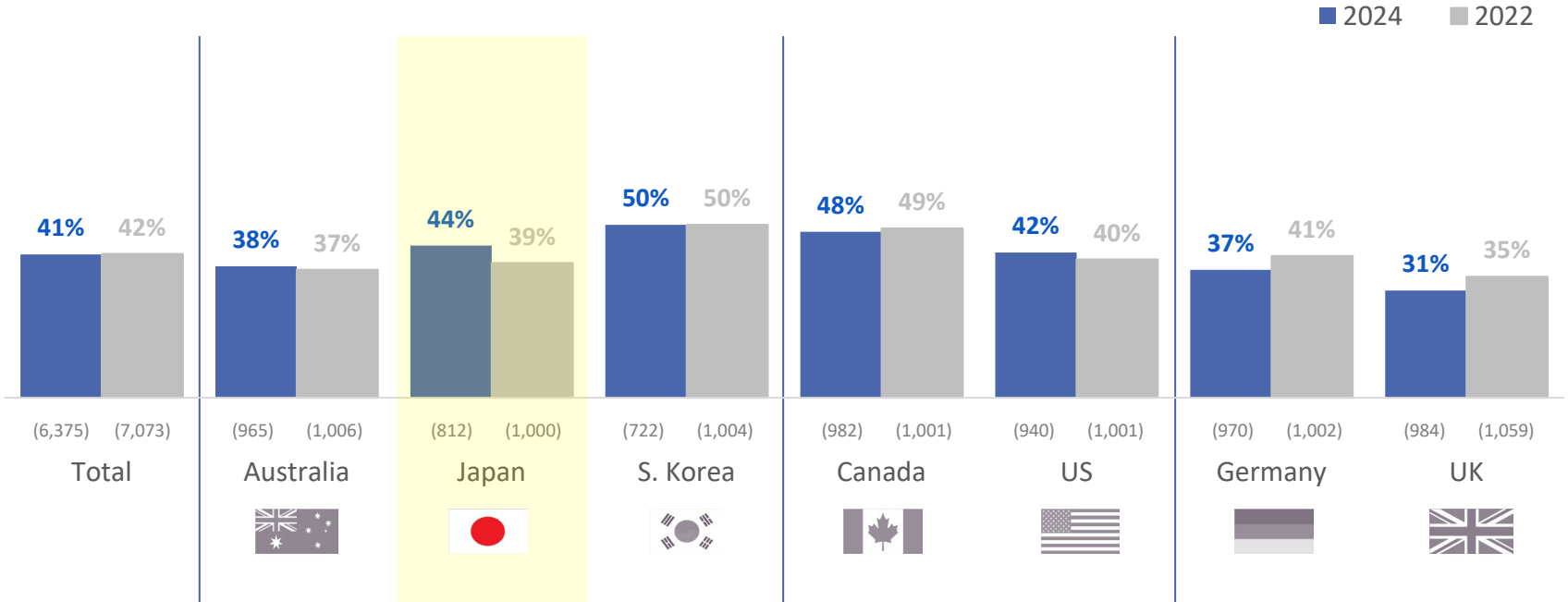
Perception of Survey Length





Survey length concerns are largely consistent with 2022.

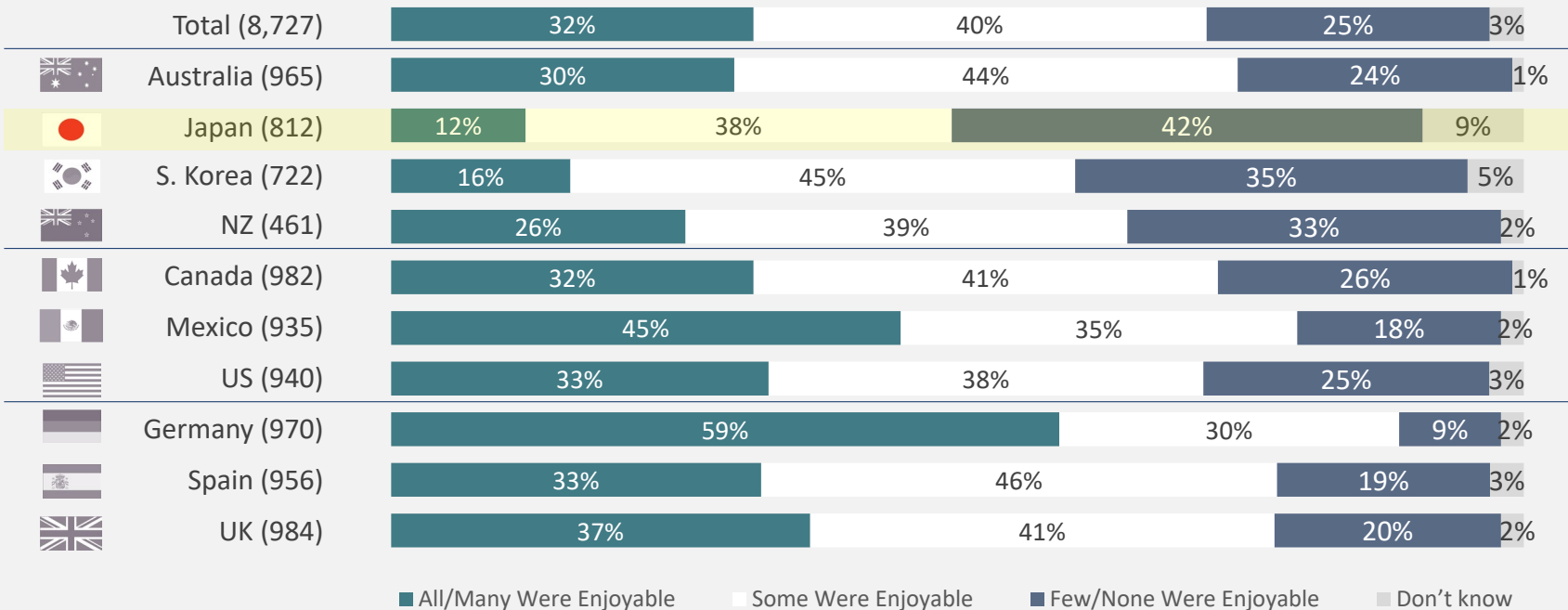
Perception of Survey Length (Too Long) - Trended to 2022





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.

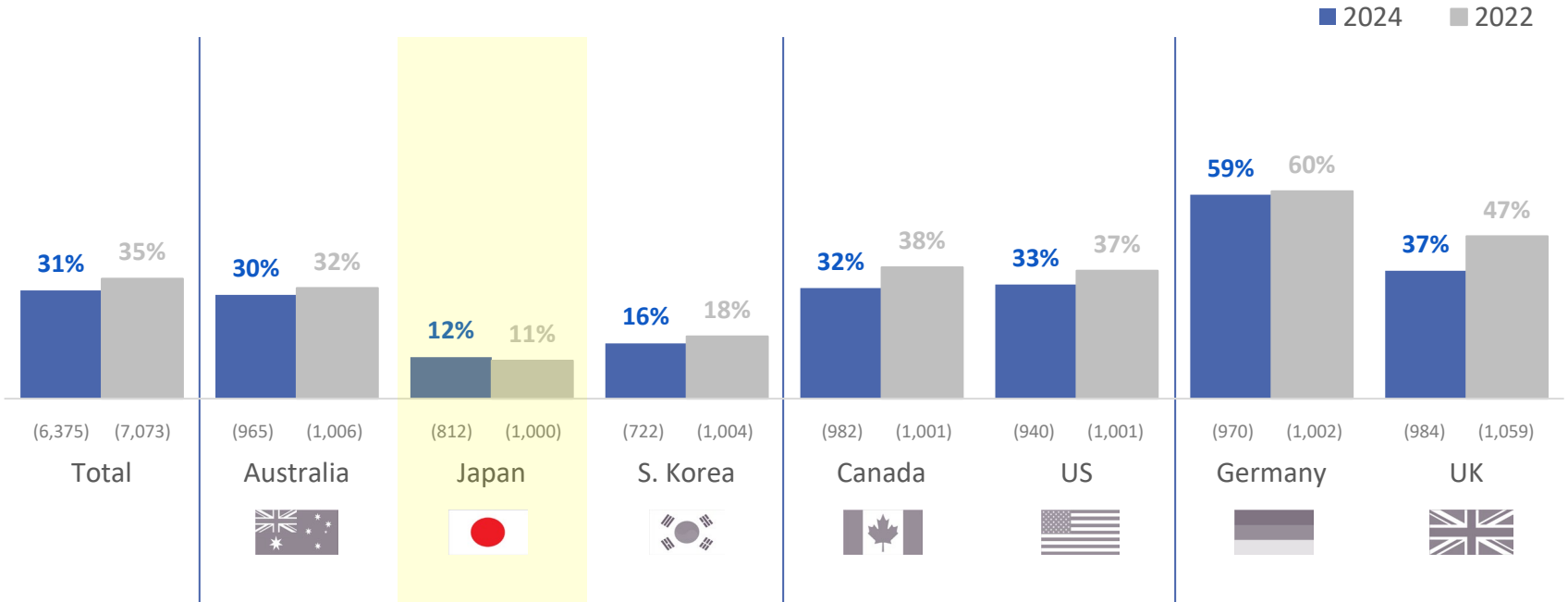
Perception of Survey Enjoyability





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

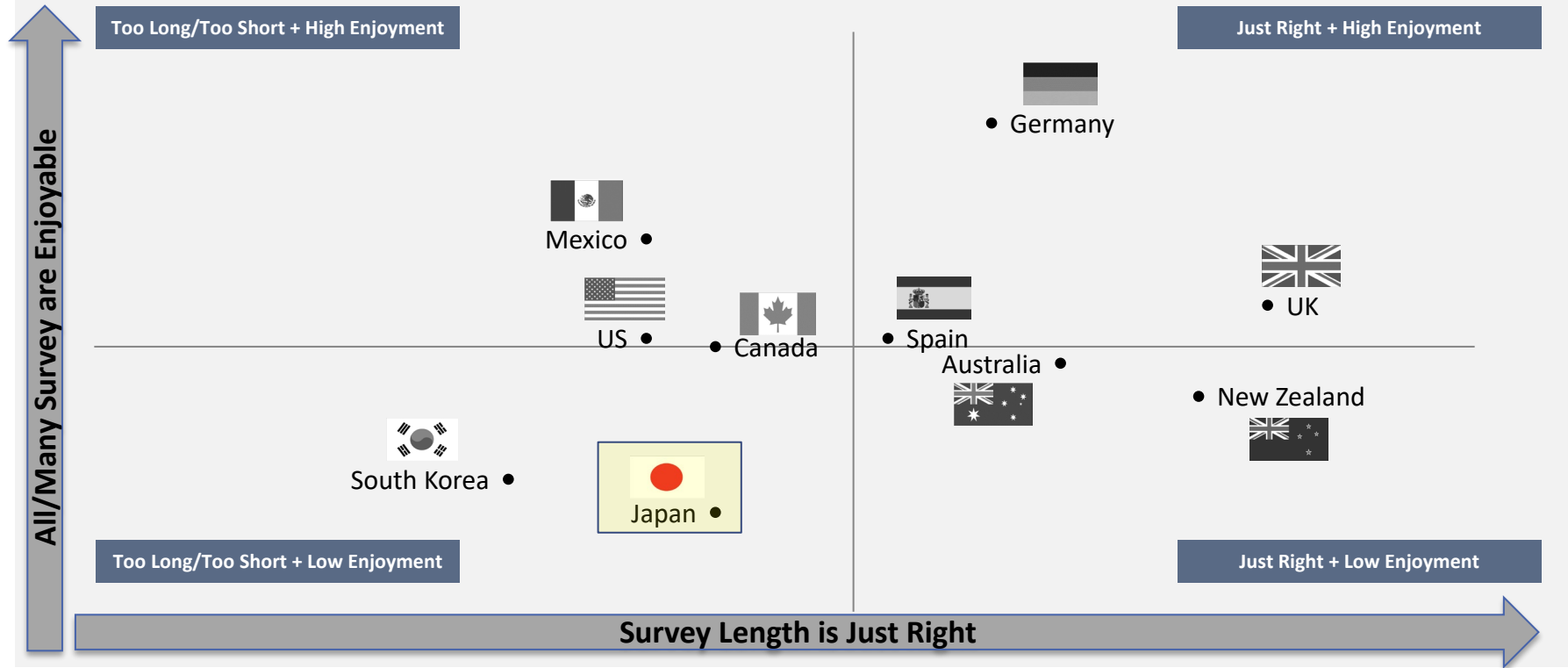
Perception of Survey Enjoyability (All/Many Were Enjoyable) - Trended to 2022





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

Relationship Between Survey Length & Enjoyability



PERSONAL DATA USE





While there's some awareness of how their personal data is collected and used, the majority in Japan are unfamiliar, indicating a need for education.



Japan



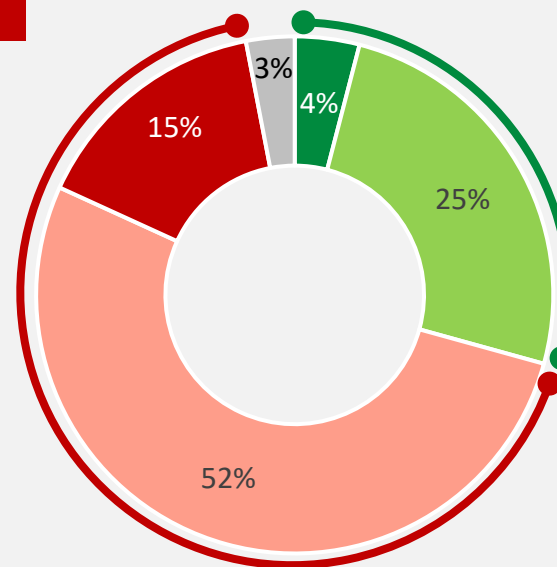
Familiarity with Personal Data Collection & Use

Not Very/At All Familiar

Very/Somewhat Familiar

2024: 67%

2024: 30%



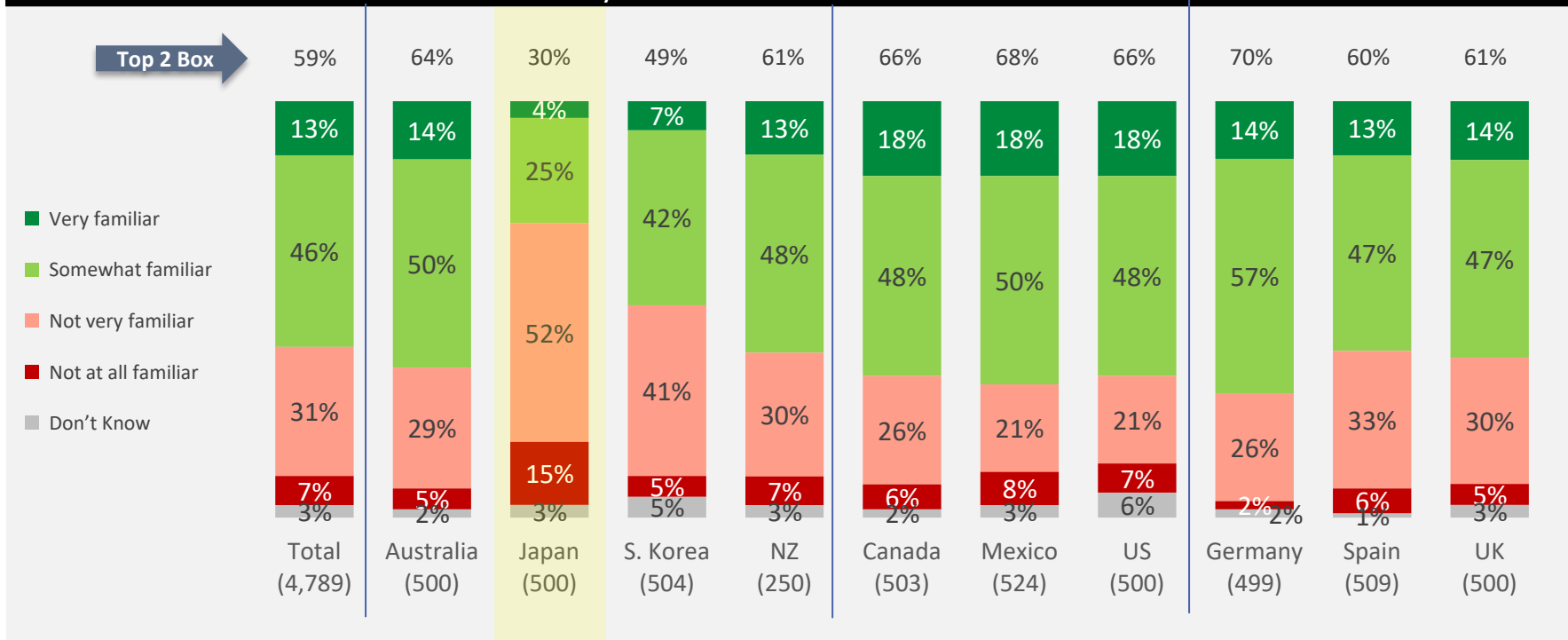
Very familiar Somewhat familiar Not very familiar Not at all familiar Don't Know



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



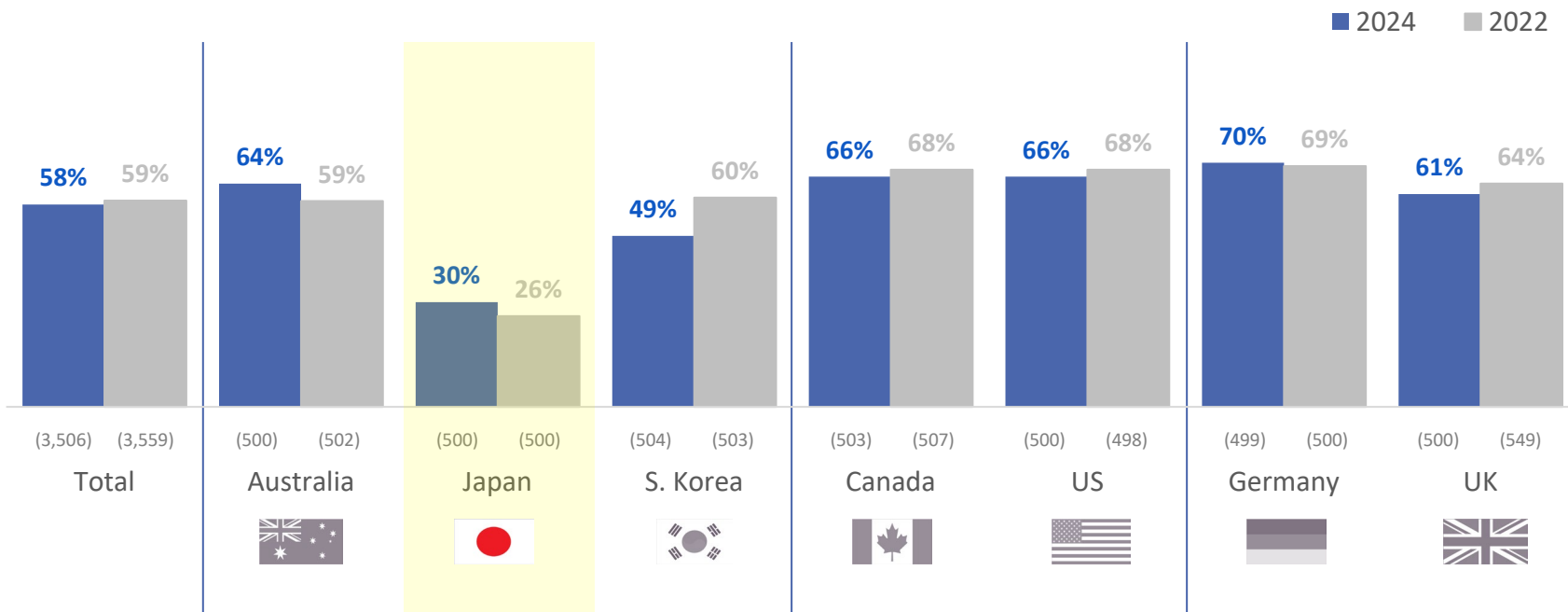
Familiarity with Personal Data Collection & Use





Familiarity is largely stable across most countries.

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





Misuse of personal data is once again a major concern for most.



 **Japan**

Level of Concern Regarding Misuse of Personal Data

Not Very/At All Concerned

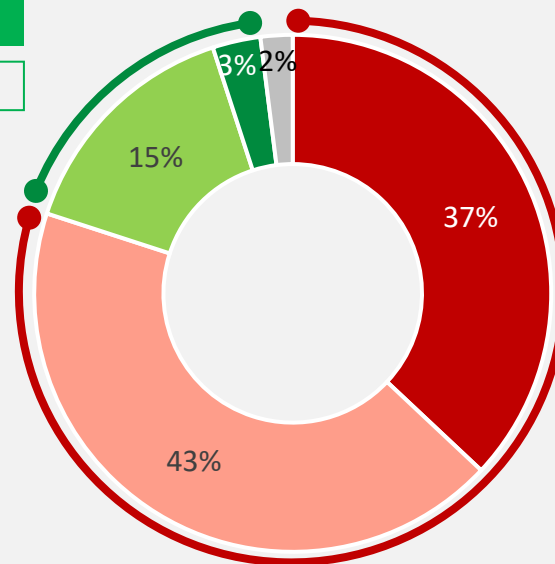
2024: 18%

2022: 13%

Very/Somewhat Concerned

2024: 80%

2022: 85%



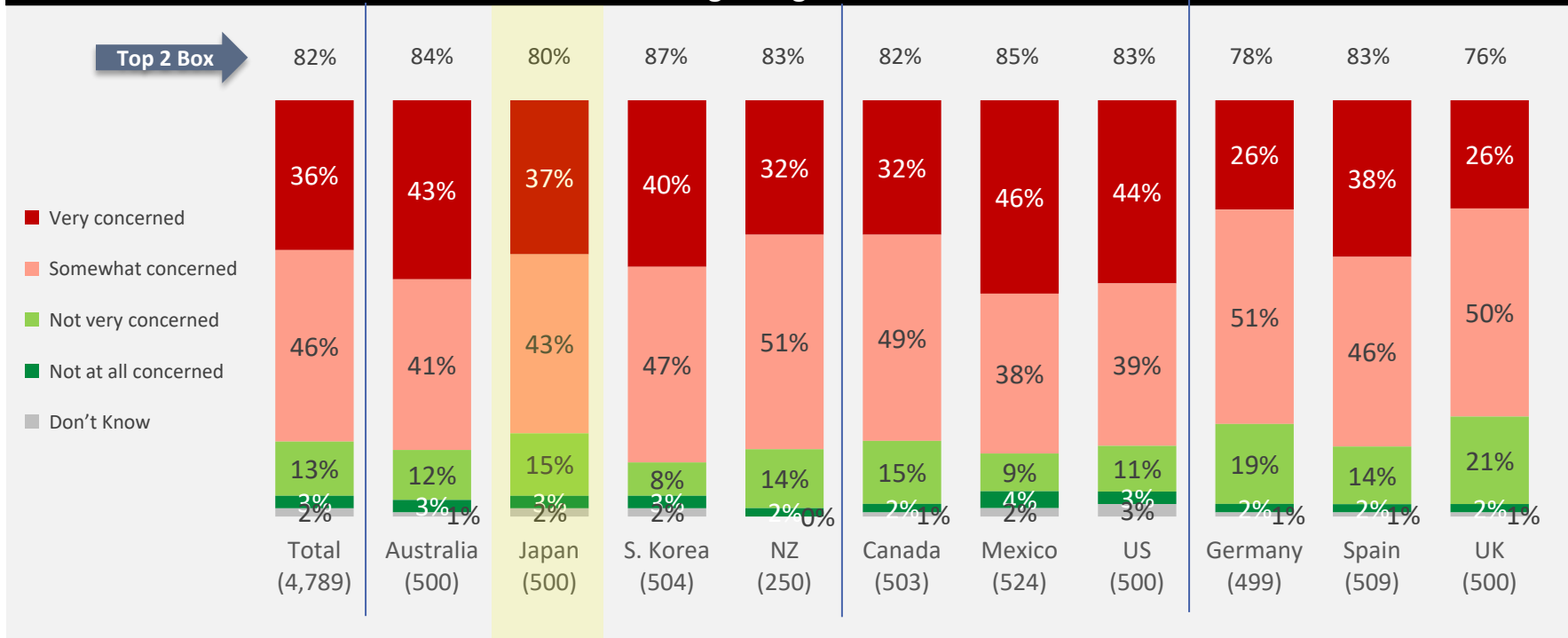
- Very concerned
- Somewhat concerned
- Not very concerned
- Not at all concerned
- Don't know/Prefer not to say



Concerns about the misuse of personal data are consistent globally.



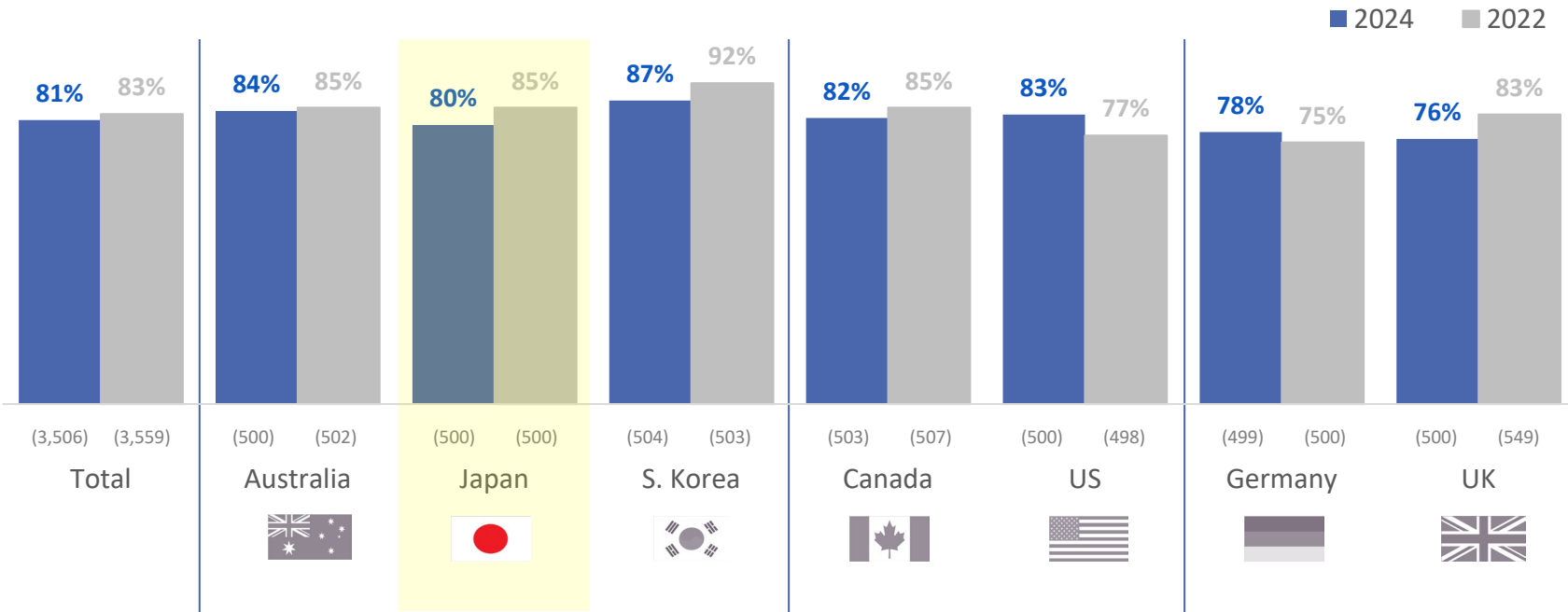
Level of Concern Regarding Misuse of Personal Data





Though still considerable, concerns have eased a bit in Japan, South Korea, and the UK vs. 2022.

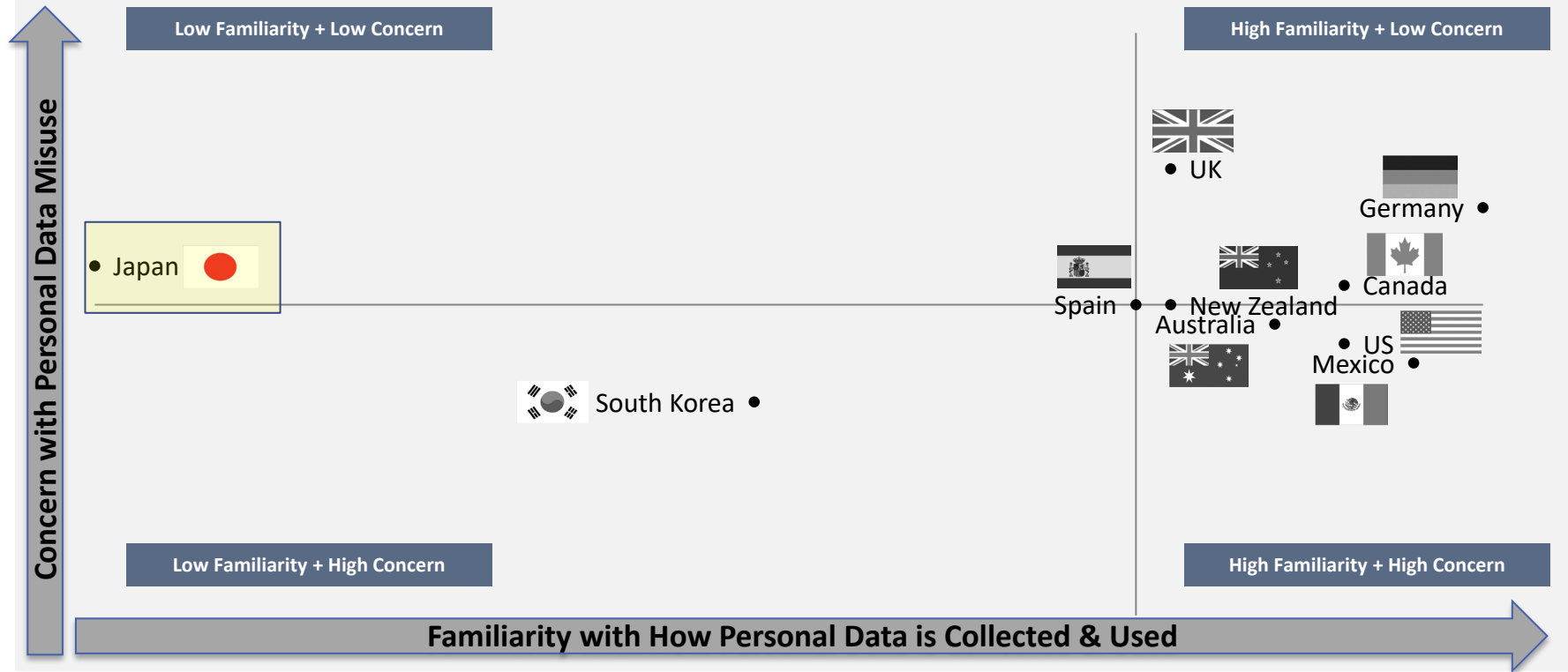
Level of Concern Regarding Misuse of Personal Data (Top 2 Box % - Very/Somewhat Concerned) - Trended to 2022





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

Relationship Between Familiarity & Concern of Misuse of Personal Data Use



**PROTECTION & USE
OF PERSONAL DATA**

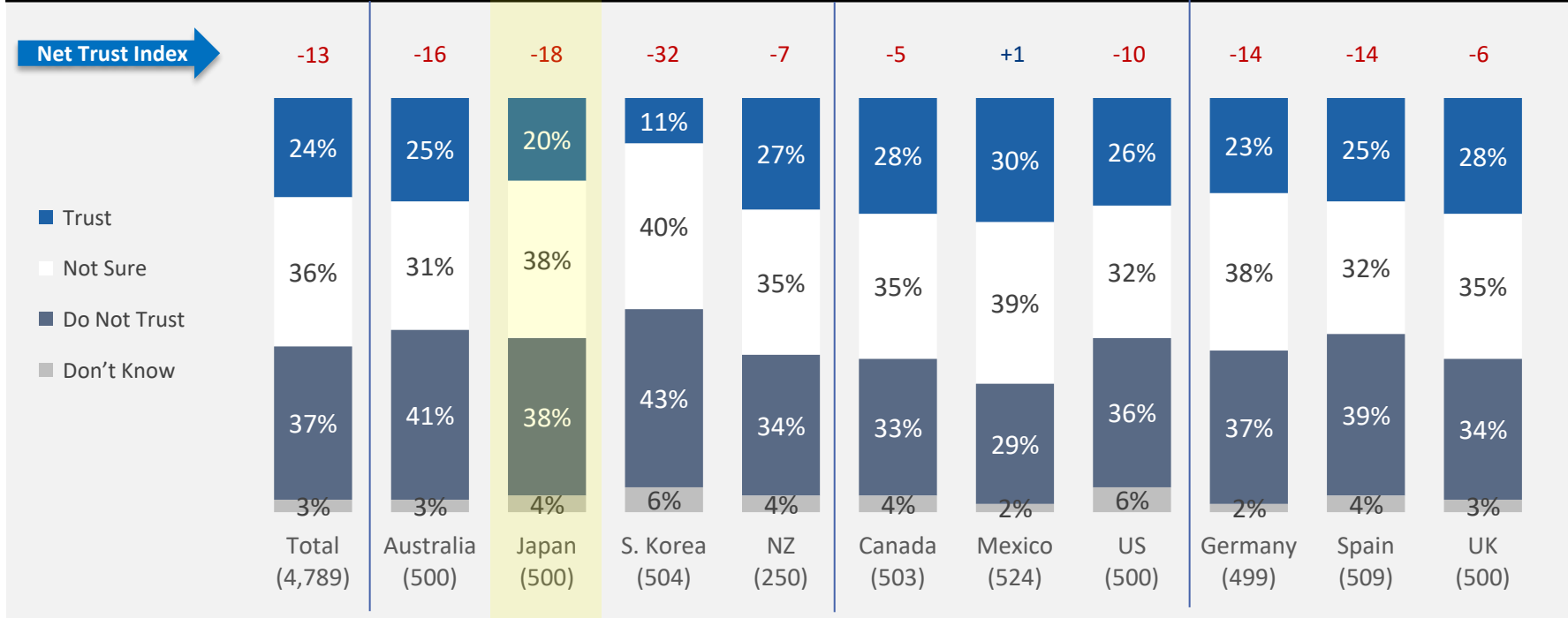




Concern exists in all countries regarding trust in organizations' abilities to protect and use consumer data responsibly.



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










Net Trust Index = % Trust – % Do Not Trust

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



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

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

	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index →	2024	-14	-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

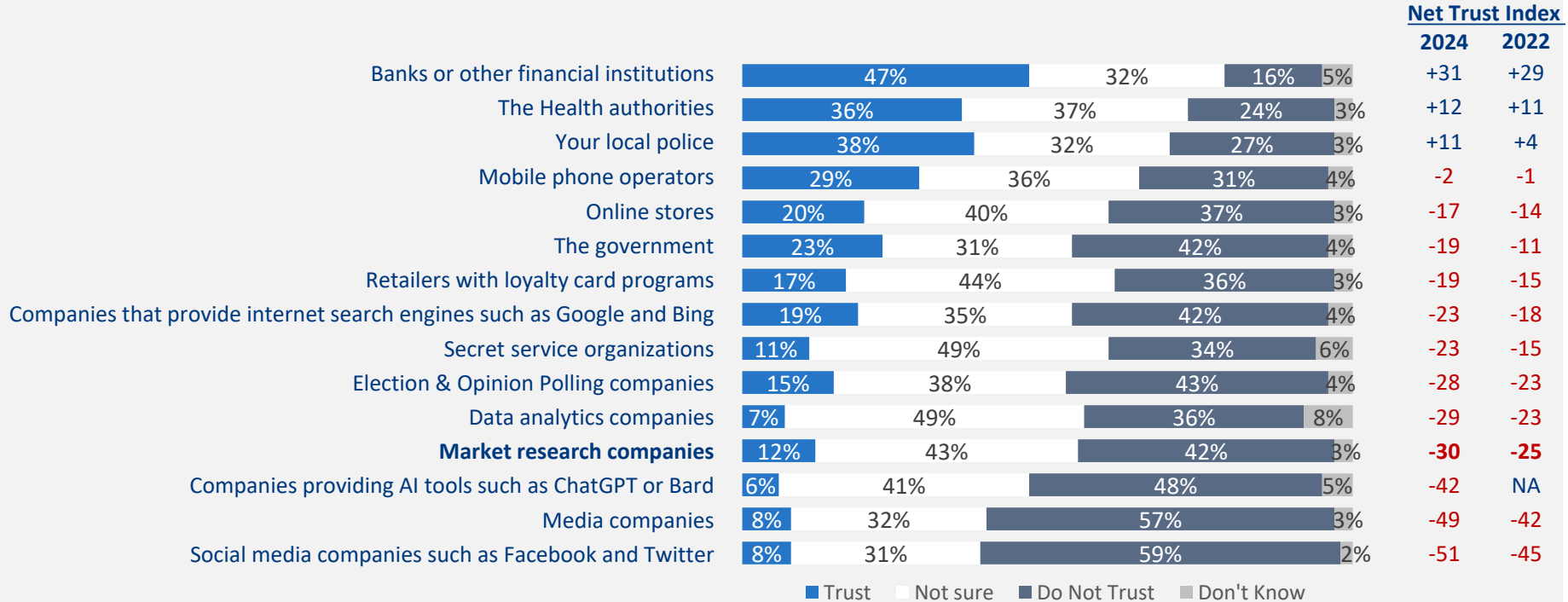


Financial institutions, followed by health and law enforcement, hold the public's highest trust in safeguarding personal data in Japan. Conversely, media companies, AI providers and social media platforms face the most distrust. Market research firms also rank towards the bottom in this regard.



Japan

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



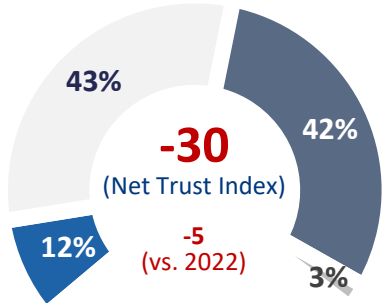
Net Trust Index = % Trust – % Do Not Trust



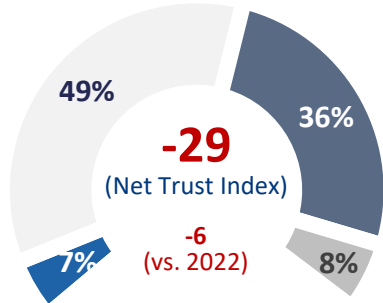
Across the “insights space,” net trust in regard to personal data is negative in Japan.



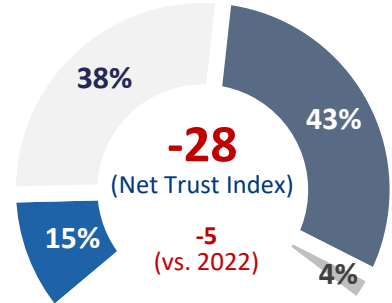
Trust in Market Research



Trust in Data Analytics



Trust in Election & Opinion Polling



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

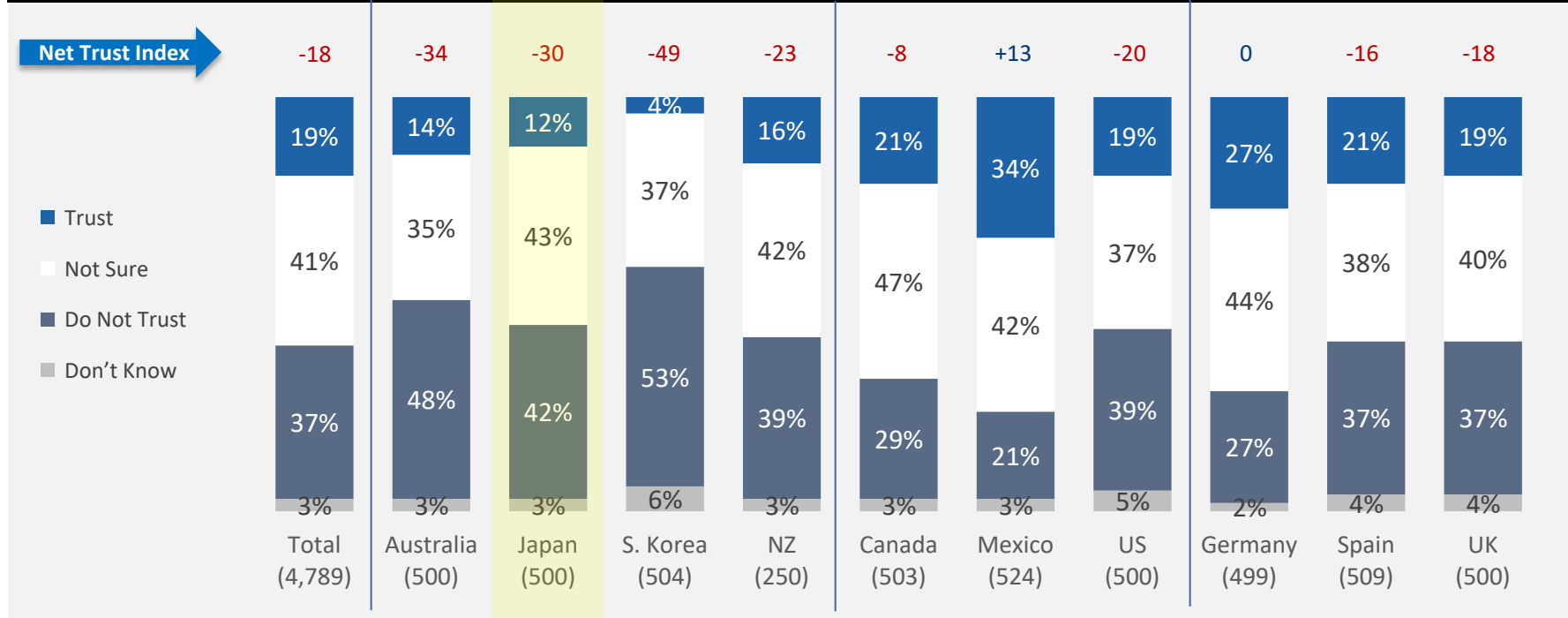
Net Trust Index = % Trust – % Do Not Trust



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



Trust in Market Research to Protect & Appropriately Use Personal Data










Net Trust Index = % Trust – % Do Not Trust



Trust of market research companies in this regard declined in almost all countries vs. '22.

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

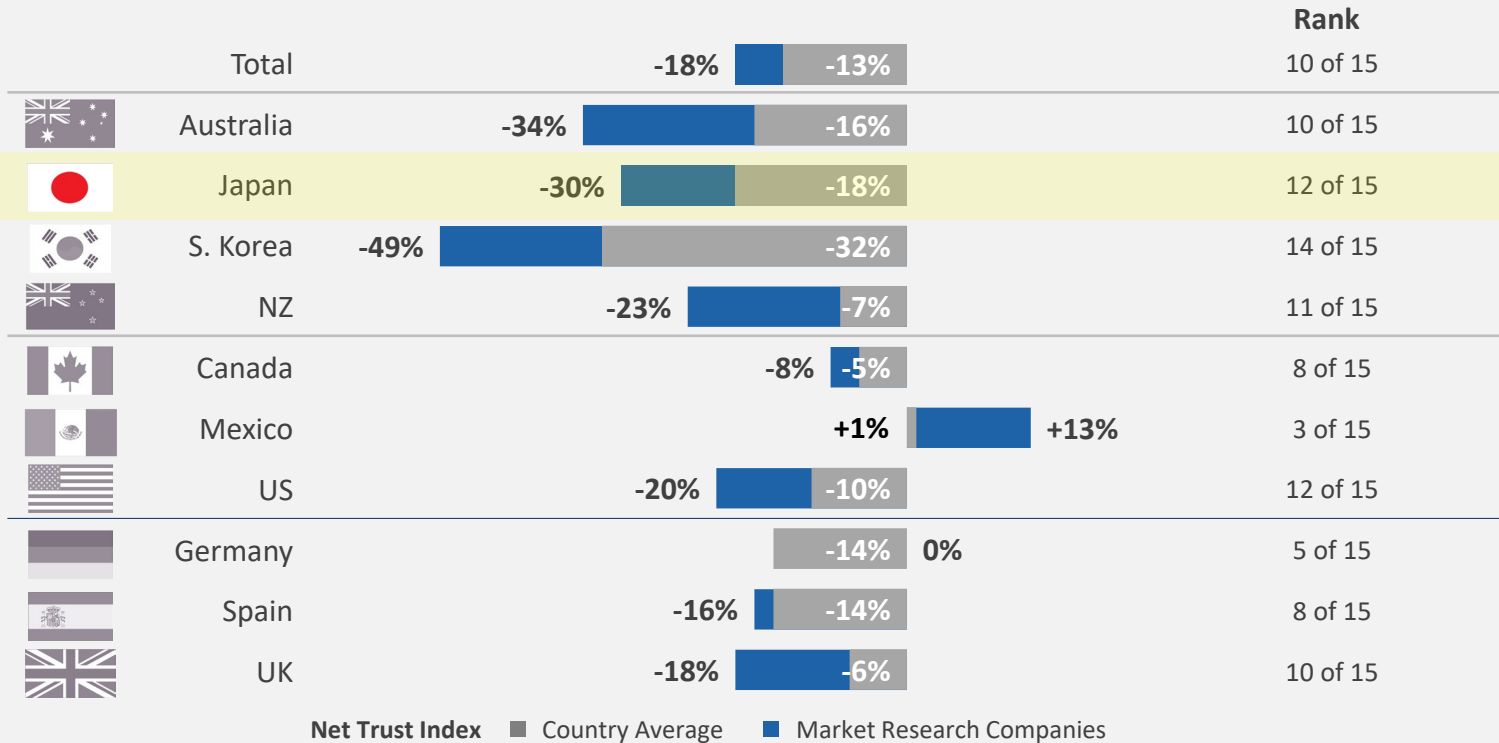
	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index	2024	-23	-34	-30	-49	-8	-20	--	-18
	vs. 2022	-5	--	-5	-12	+8	-12	-8	-7
% Trust	2024	17%	14%	12%	4%	21%	19%	27%	19%
	vs. 2022	-2%	--	+3%	-3%	+3%	-7%	-3%	-5%
% Do Not Trust	2024	39%	48%	42%	53%	29%	39%	27%	37%
	vs. 2022	+4%	+1%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

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



In regard to trust with personal data, market research companies rank towards the bottom for most countries.

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



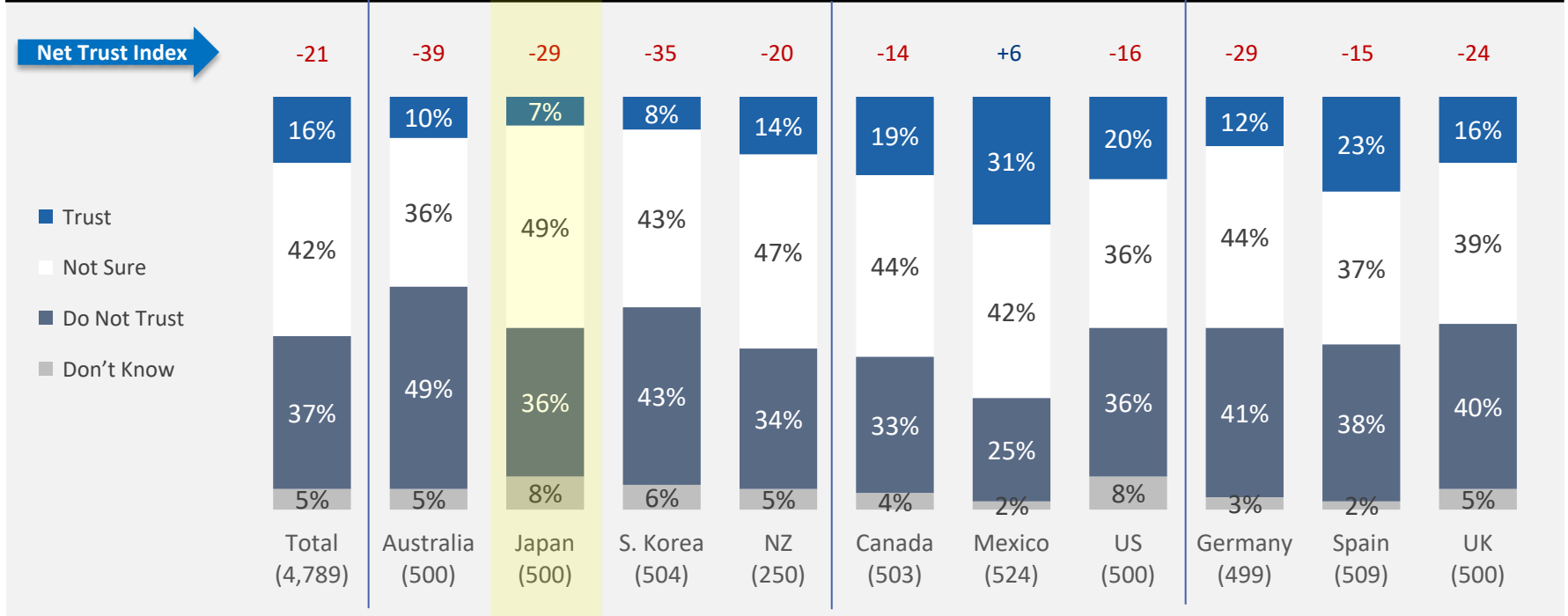
Net Trust Index = % Trust – % Do Not Trust



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



Trust in Data Analytics to Protect & Appropriately Use Personal Data










Net Trust Index = % Trust – % Do Not Trust



Net trust remains negative overall, with distrust growing in almost all 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%

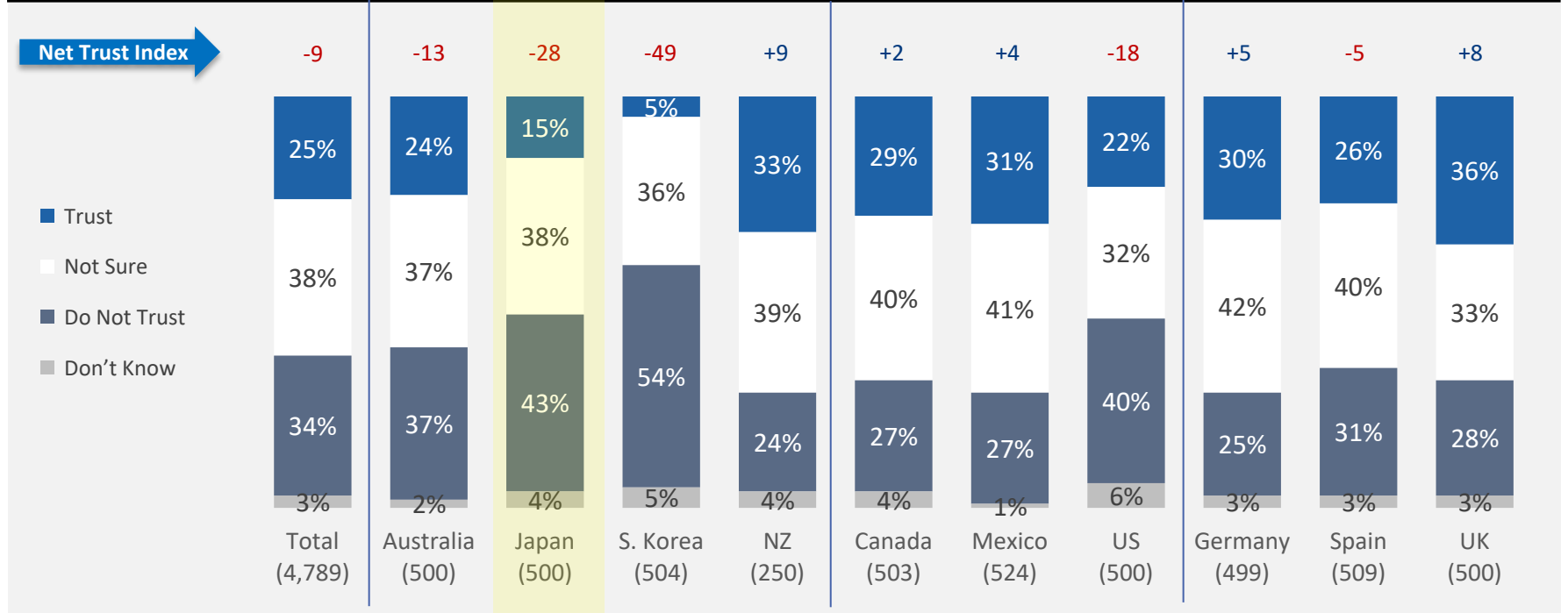
Net Trust Index = % Trust – % Do Not Trust
*Total based on comparable countries across waves.



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.

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 rendered in a bold, sans-serif font. The text is arranged in a vertical list, with some words in larger, bolder fonts than others. The magnifying glass's lens is slightly blurred, creating a sense of focus on the data.

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



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



 **Japan**

Appropriate Use of Personal Data by Market Research

Bottom 2 Box: Inappropriate

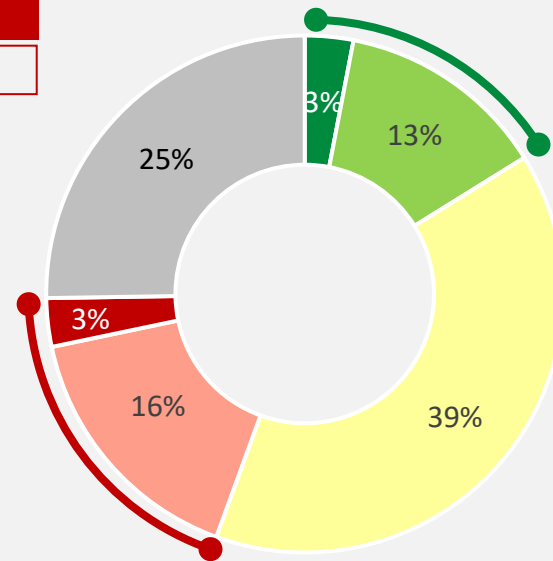
2024: 19%

2022: 18%

Top 2 Box: Appropriate

2024: 17%

2022: 17%



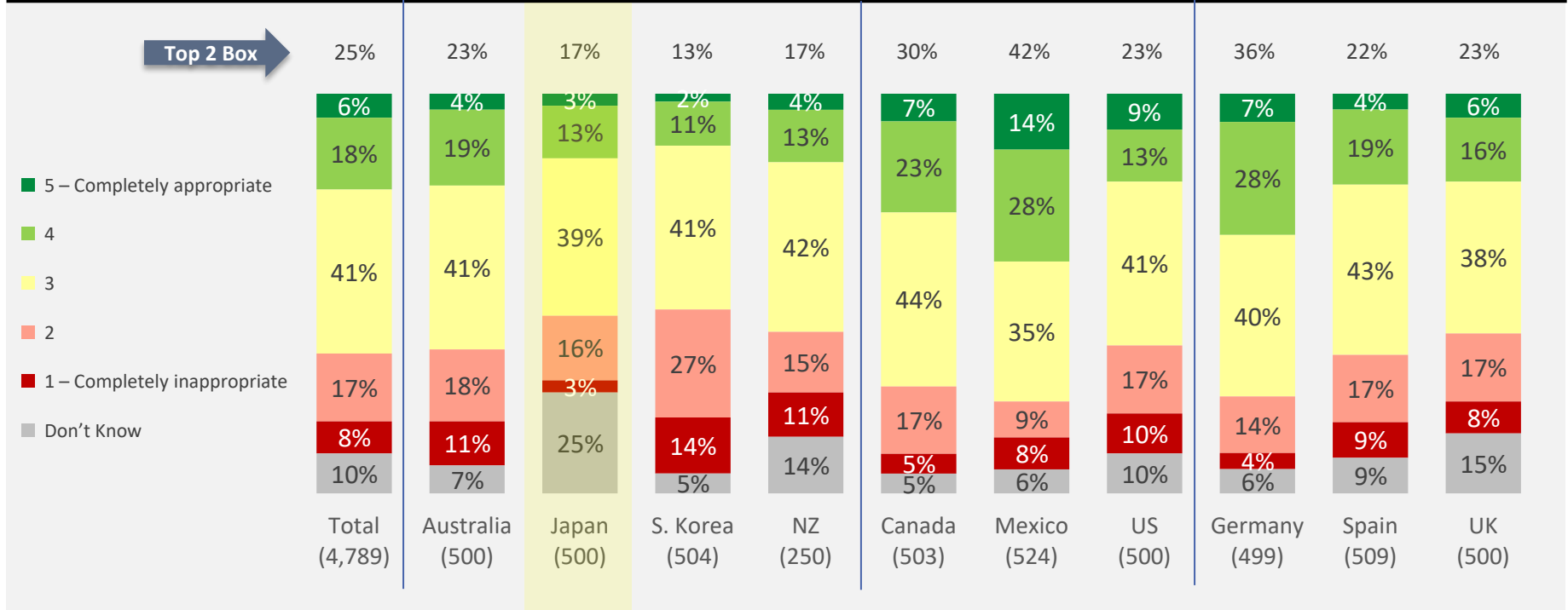
■ 5 - Completely appropriate ■ 4 ■ 3 ■ 2 ■ 1 - Completely inappropriate ■ Don't know



This mixed sentiment is evident across countries – Mexico and Germany being the most favorable, while South Korea, Japan and New Zealand are least so.



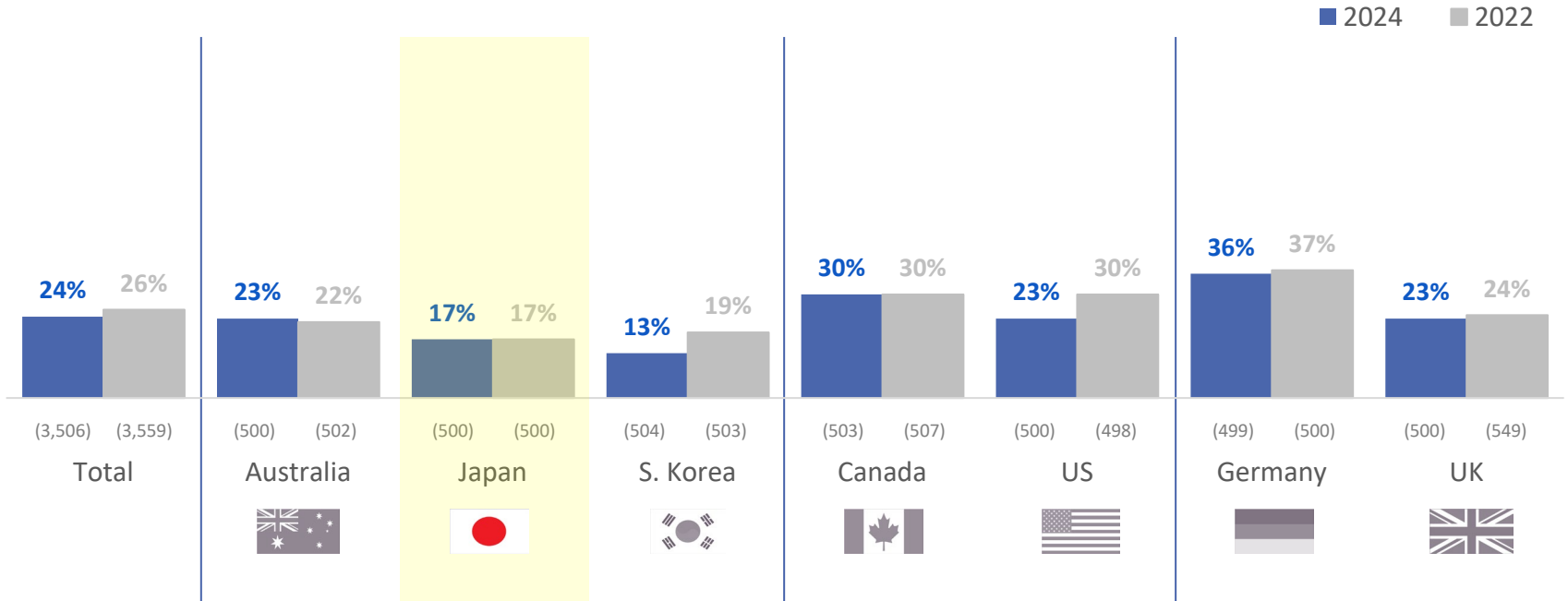
Appropriate Use of Personal Data by Market Research





Feelings about market research companies appropriate use of personal data are consistent with 2022.

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





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



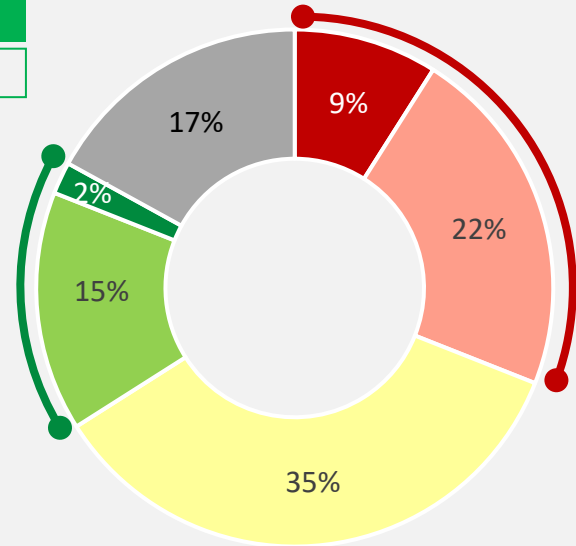
Concern that Market Research Securely Protects Personal Data

Bottom 2 Box: Not Concerned

2024: 17%
2022: 10%

Top 2 Box: Concerned

2024: 31%
2022: 37%



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



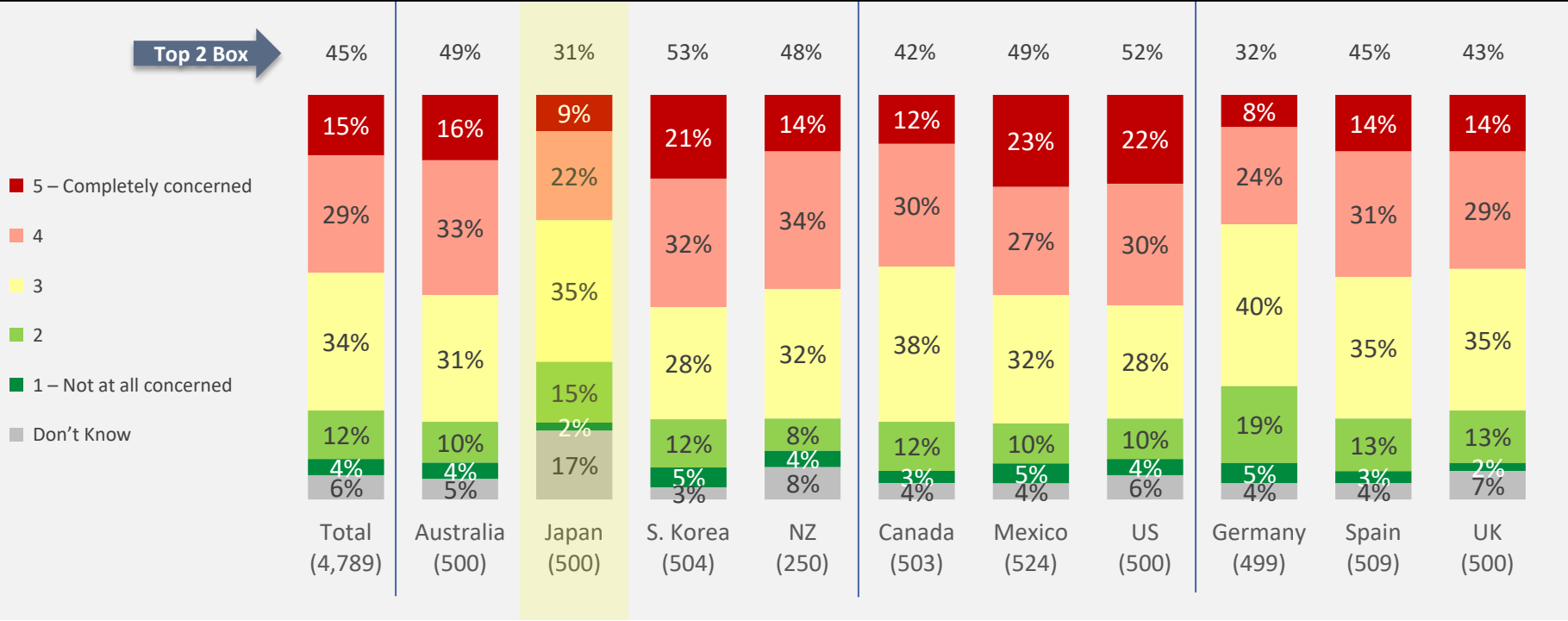


Concern in this regard is lowest in Japan and Germany.



Concern that Market Research Securely Protects Personal Data

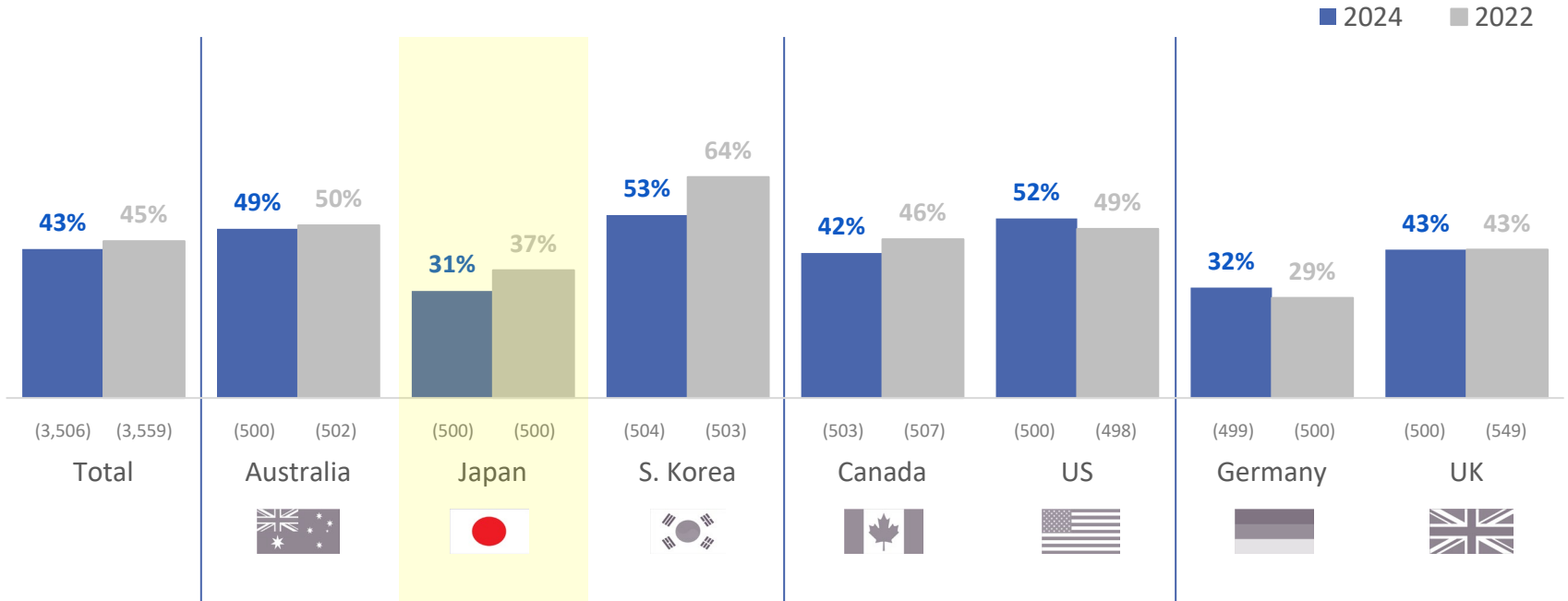
Top 2 Box





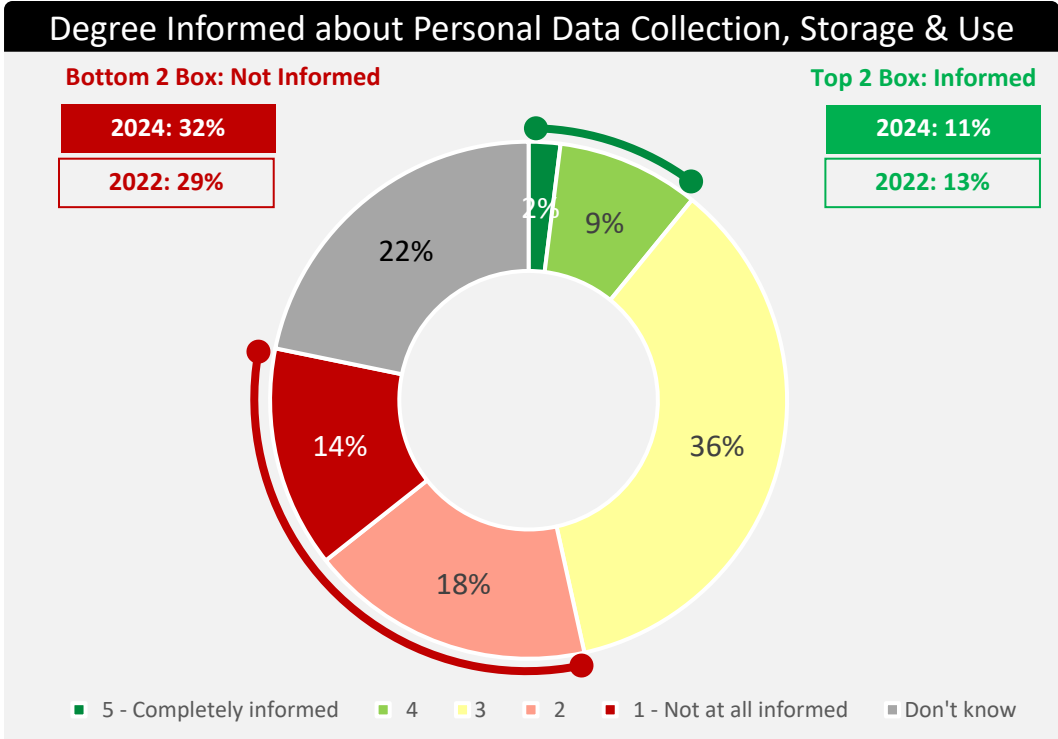
Relative to 2022, concern declined slightly in Japan and South Korea.

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





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

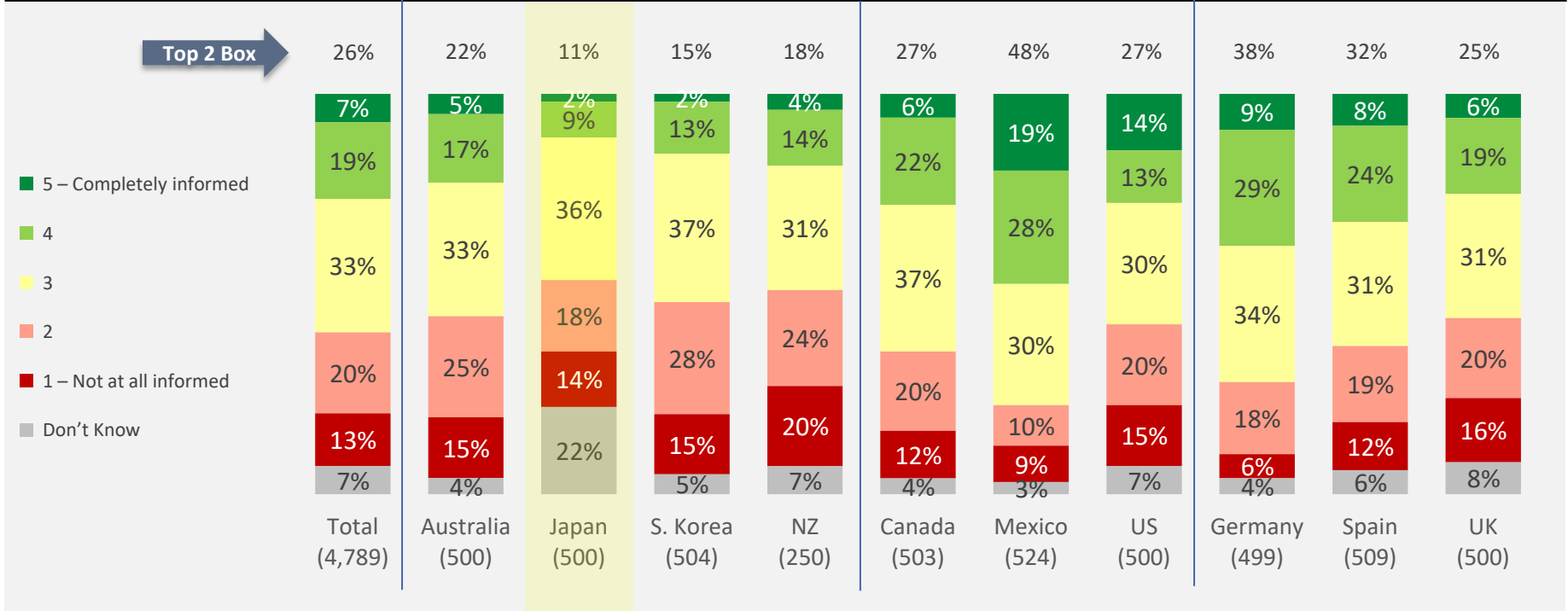




Consumers in Mexico and Germany feel the most informed, while those in Japan, South Korea and New Zealand feel the least so.



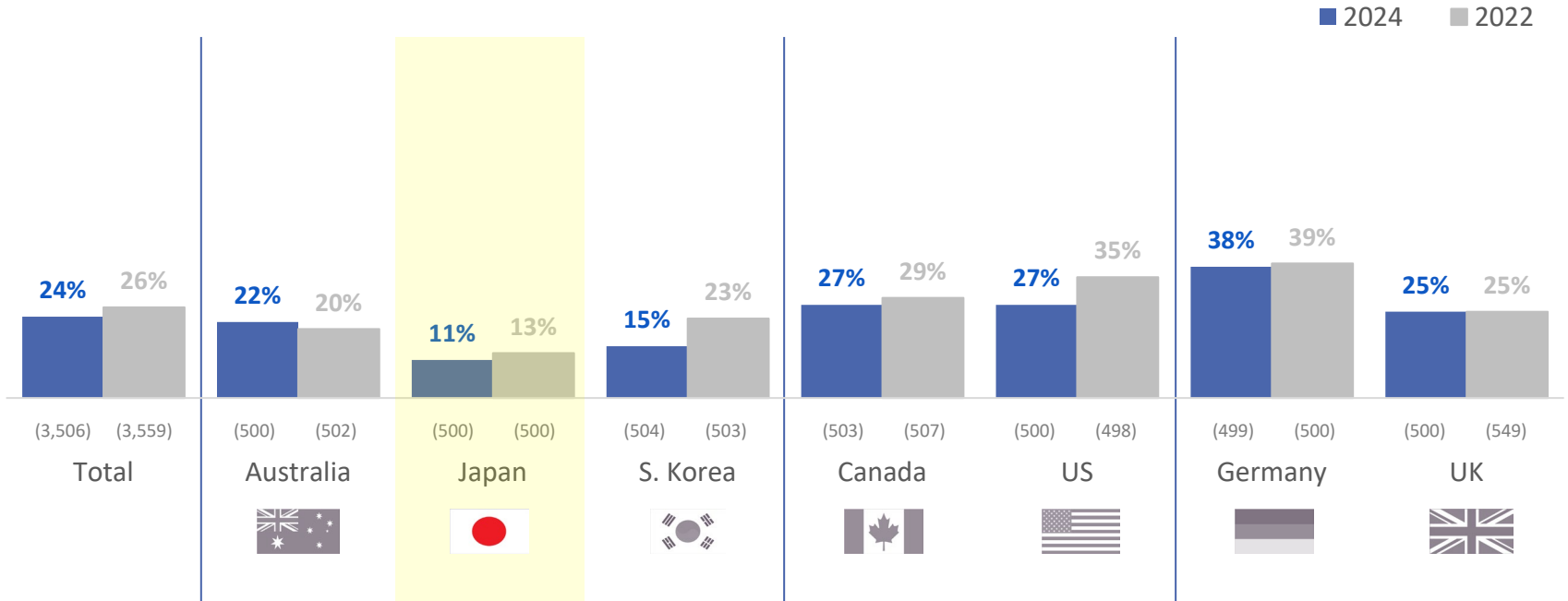
Degree Informed about Personal Data Collection, Storage & Use



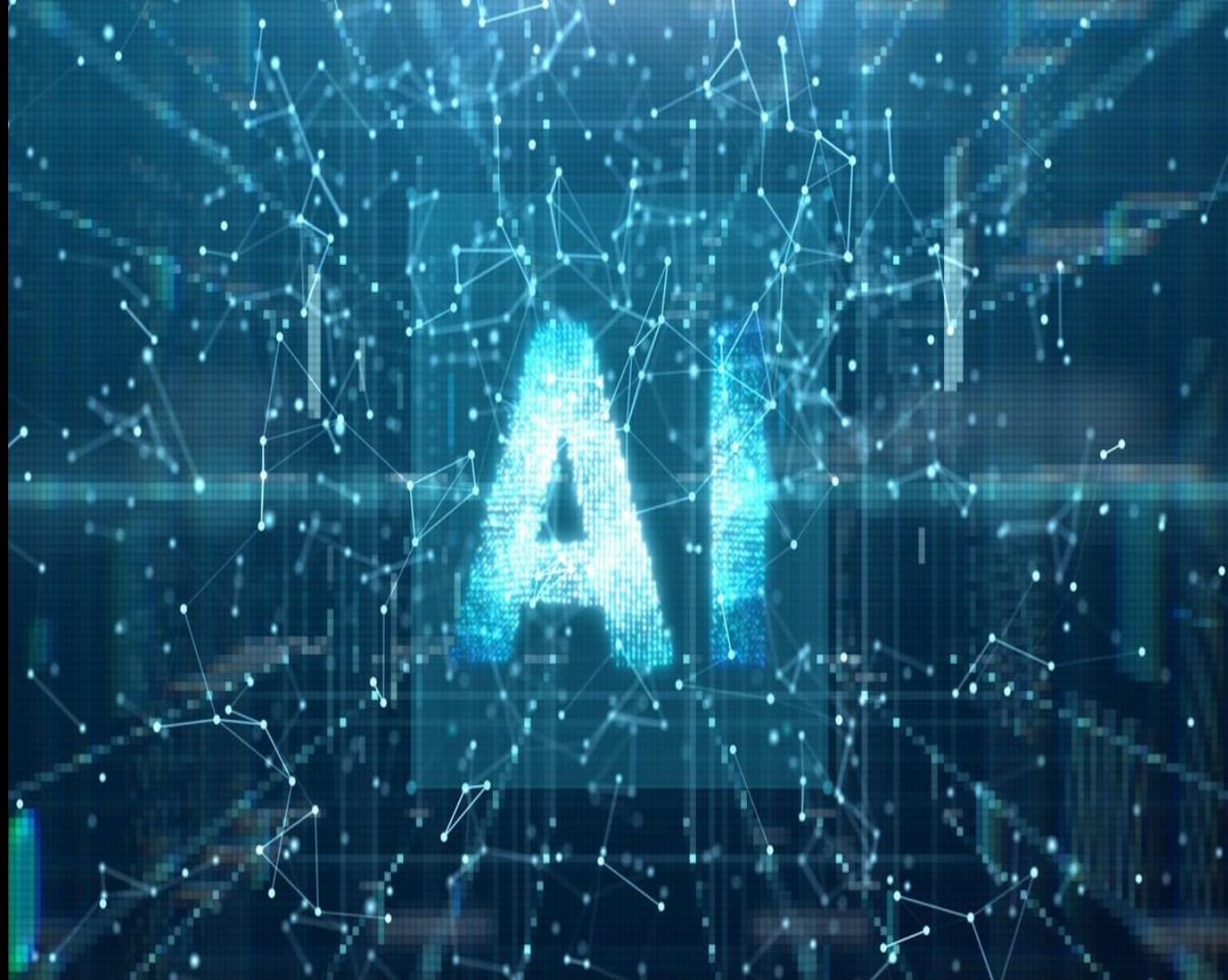


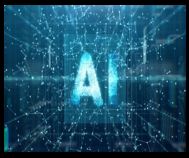
Concern in this regard is largely stable globally vs. 2022

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



**HOW AI
IMPACTS
THE LEVEL OF TRUST**





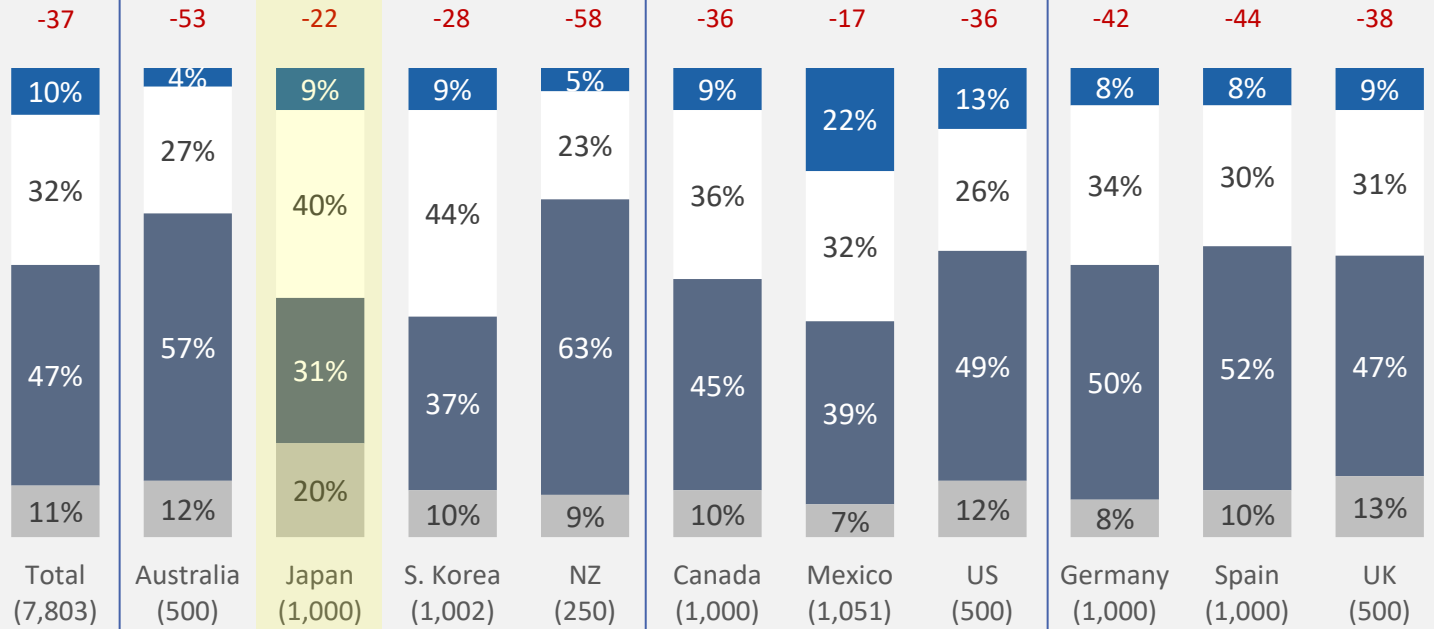
Incorporating AI into market research practices negatively impacts trust in market research companies.



Average Impact on Trust of Market Research Companies Using AI†

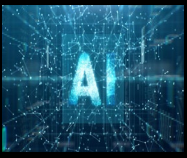
Net Trust Index

- 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



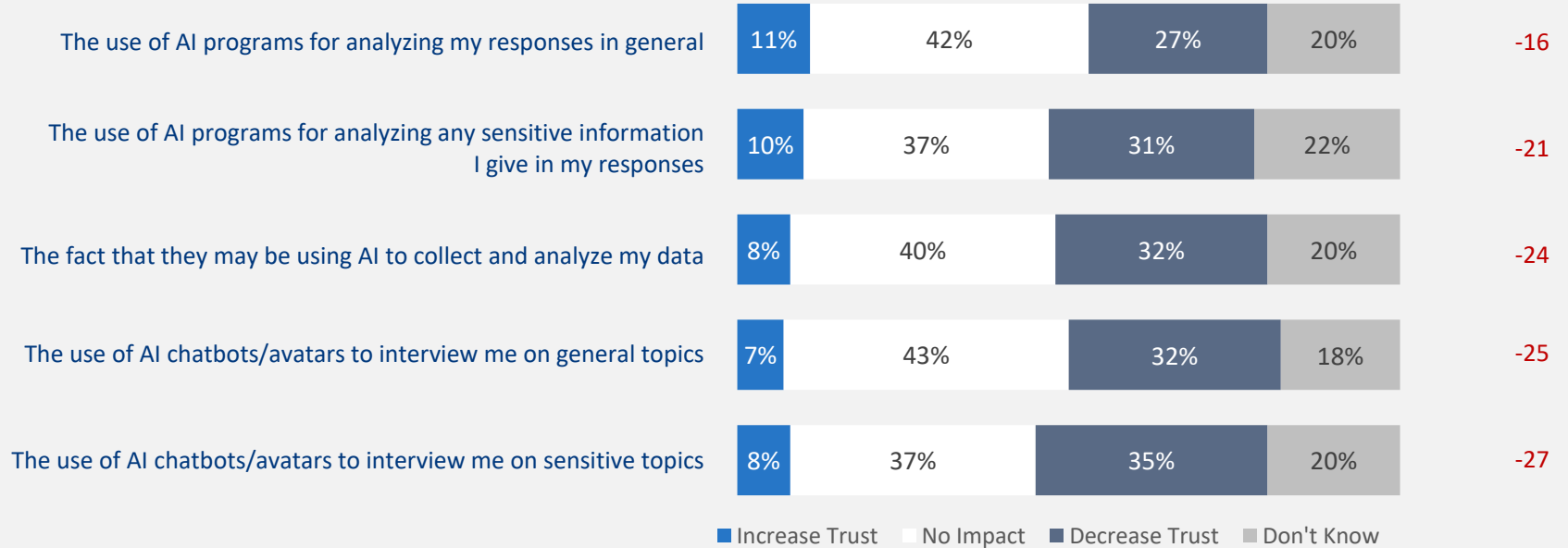
Net trust is negative across all aspects of AI use by market research companies.



Japan

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

Net Trust Index
2024



Net Trust Index = % Increase Trust – % Decrease Trust

**TREND DATA
2024 VS. 2022**

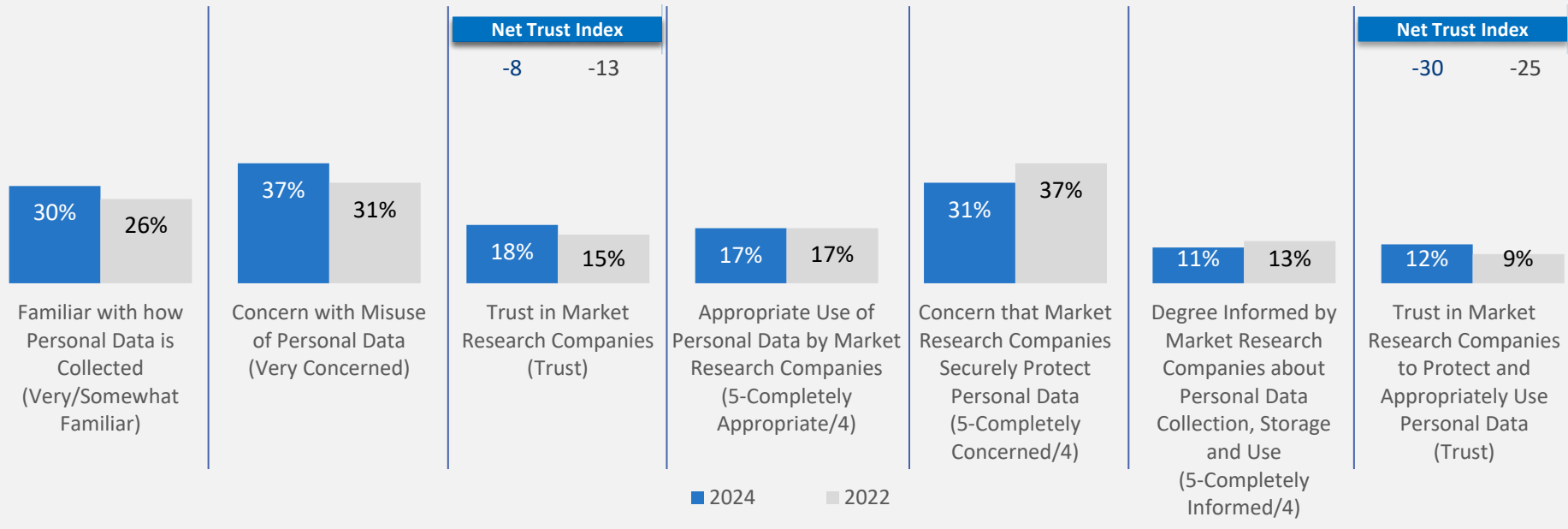




Though still negative, net trust in market research companies overall rose slightly, whereas net trust in relation to personal data use is slightly lower.



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

