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Global Trust Survey 2024

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

Focus on the UK

April 2024





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Read Me: I'm Important

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Introduction by Andrew Cannon, Executive Director, GRBN

“Trust is a precious thing. It is hard to build and easily lost.”

“Trust cannot be taken for granted. It needs to be earned.”

Two simple, but powerful truths I believe, but why should we, the global market research sector, care about the general public’s trust?

The general public is the lifeblood our sector relies on. Without people’s willingness to voluntarily give us their time, their opinions and access to their data, our industry is ill-equipped to meet the needs of decision-makers, who rely on the data and insights we provide to inform their decisions.

The findings from this survey tell us that the general public has a “reasonable” amount of trust in our sector. This is good, but is it good enough? Should we rest on our laurels?

I believe not. I believe that our sector has much to gain from being more trusted by the general public. Not only would this improve response rates and data quality, but also differentiate our industry from others who are also playing in the data space, both in the eyes of the general public, but also in the eyes of business decision-maker and the authorities.

I believe that trust with personal data will become more, rather than less, important in the years to come. The data from this survey shows that our industry is, in my opinion, punching below its weight on this matter. A definite opportunity for us to improve.

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



Andrew Cannon

Executive Director, GRBN

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Thought Leadership – Debrah Harding, MRS

Protecting Participants is Key to Trust

At a time when the sector is struggling against a tide of fake data, fraudulent participants and bot technologies, which are affecting research data quality and integrity, the need to protect and encourage real participants has never been so important. The success of research relies upon the ability of the sector to engage and encourage members of the public to become participants. Without trust, the sector will struggle to attract participants and the future of research becomes very bleak indeed.

Whilst it is encouraging that in the UK the value market research brings to business is recognized, there is still more to be done to improve the value recognition by individuals. Part of this will be about improving the participant experience when contributing to research, but other factors such as assurances about data protection and data security are equally important.

The UK research sector is renowned for its innovation, and it is without doubt one of the key strengths of the UK research sector.

However, the profession must also be cognizant of the impact that some of the new technologies may have on the perception of their activities. The GRBN Trust Survey results show that in the UK there are low levels of trust in data analytics, social media and AI; and all of these techniques are part of the researcher's toolkit. But there is also evidence from other research undertaken in the UK, that when these tools are used for purposes perceived as beneficial to the public, such as using AI for cancer detection, the public becomes more comfortable; with the caveat that the majority would like to see laws and regulations guiding the use of such technologies.

For the research sector, if AI and related technologies are used without consideration for ethics, the output from AI can amplify and emphasize human biases which could result in harm to individuals, business, and society and could ultimately damage the research sector itself. Conversely, if AI and related technologies are positively managed by researchers, with ethical principles, which protect and inform participants at the core, the potential of the technology's possibilities can be maximised.



Thought Leadership – Debrah Harding, MRS

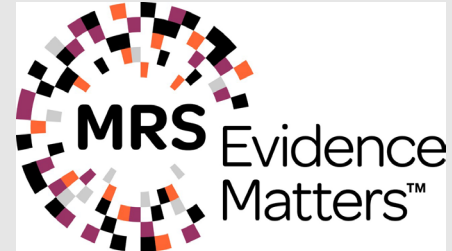
In the UK, MRS has developed comprehensive guidance setting out how practitioners can act legally and ethically when using AI and related technologies. Within the MRS Code of Conduct there are 12 ethical principles which underpin all rules and requirements within the Code. Within the new MRS guidance [Using AI and Related Technologies](#) the 12 Code principles have been applied to the use of AI and related technologies in all its forms.

In the UK this is the first step to keep a abreast of this rapidly evolving policy area, particularly as legal and regulatory frameworks develop around the world.

The research sector needs to adopt AI and related technologies in a measured, legal, ethical and privacy-first way to ensure that the sector harnesses the benefits whilst mitigating the risk. As a sector, research relies upon the confidence of clients, users and participants in the value of what we deliver. To continue to retain that confidence, we need to put participants first and safeguard their confidence to support our activities.

Debrah Harding

The Market Research Society (MRS)





Thought Leadership – By Kendall Knight, Opinium

Building trust in AI with the human touch

‘If’ and ‘when’ to ‘what’

‘If’ or ‘when’ are no longer the questions being asked about AI’s implementation in market research. AI is here and increasingly present in the day-to-day practices used to collect, handle and analyse data.

For consumers, the question therefore changes from ‘if’ and ‘when’, to ‘what’. Namely, ‘what does this mean for me and my data?’

Regardless of industry, the potential impact of AI on humans raises concern and the ‘what’ question becomes even more prominent. For market research, a sector in which just 1 in 5 consumers (19 %) trust the organisations within it to collect and process personal data and 76 % are concerned that their personal data might be misused, answering this question carefully is fundamental to keeping faith high.

This is more pressing still since it has come to light that nearly half (47 %) feel the use of AI in market research decreases their trust in the industry.

The problem presented for industry professionals is therefore a double-edged sword: AI is key to keep up with a rapidly changing landscape that demands efficiency, accuracy and automation of vast quantities of data. But it risks trust in market research practices and technology.

Promoting the education piece

Answering consumer questions and educating audiences on AI is essential to boost trust in market research processes and the industry itself. Problematically, promoting the benefits of AI and how it improves market research and data quality alone does not generally increase trust in the technology.

Upon seeing statements around the benefits of AI, trust in market research companies making these claims increased for just 16 % of respondents. These same statements also reduced levels of trust for more than 1 in 3 (35%) and stayed the same for another third (36%). Such statements ranged from the positive effects of AI on speed to tackling human-bias.



Thought Leadership – By Kendall Knight, Opinium

Adding the human touch

While we should continue promoting AI's benefits, in tandem we must go back to the fundamentals, focusing on what AI really is and how it is used in order to remove fear of the unknown. After all, AI has become a buzzword largely devoid of meaning and it is easy to forget that it is a tool just like any other: it's how humans utilise AI that makes it effective.

AI is a technology that uses algorithms to learn from large amounts of data, process patterns and produce its own findings based on this. That's why in market research it can automate questions through chatbots, identify themes in vast data sets or conduct sentiment analysis on qualitative data.

However, the process still requires human input and perspective to provide nuance and industry-specific knowledge in a way that machine learning cannot. Market researchers must combine AI analysis with their own insight to give context to findings. It is human interpretation of AI that produces the most powerful results and tech alone should not be left to provide answers.

Humans also have the power to control data security risks that may come with AI and can put policies in place to quash threats that arise. Whether this is adding opt-in questions for respondents taking surveys that rely on AI, heightening GDPR regulations around the use of personal data during AI processes, or even ensuring that market research companies create rules around acceptable use cases for AI and what AI tools can be used during analysis.

Perhaps then, the first question that should be answered is not 'what does AI mean for me and my data?' but 'what really is AI?' and 'how are humans utilising it?'. The key to building trust in AI and the research industry as whole is teaching that AI empowers *us* but only as long as *we* empower *it*.

Kendall Knight

Opinium



What people think,
feel and do



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

- ✓ In the UK, consumer trust in market research companies remains average relative to other types of organizations. That said, it fares better than data analytics companies.
- ✓ The value market research brings to businesses is recognized, but there's opportunity to boost perceptions as it relates to individuals.
- ✓ While there's still opportunity to improve the survey experience, survey length is deemed the most acceptable in the UK.
- ✓ There continues to be widespread distrust in how industries, including market research, handle personal data.
- ✓ UK consumers are highly skeptical of AI use in market research and express great distrust of companies touting its benefits.





Key Changes 2024 vs. 2022

- ✓ Public trust in organizations declined slightly in the UK and most other countries.
 - Trust in **market research companies** held relatively steady and remains a net positive.
 - Negative perceptions of **data analytics companies** persist worldwide, with the greatest declines in South Korea and the UK.
 - While net trust in **election & polling companies** is negative globally, it's still positive and stable in the UK.
- ✓ Across all countries, consumers perceived a greater personal benefit from market research.
 - Positive perceived benefits to consumers remained largely consistent in the UK.
- ✓ There's universal erosion of trust in how organizations handle personal data.
 - This distrust is evident in most countries across most of the “insights space” (market research and data analytics companies).



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



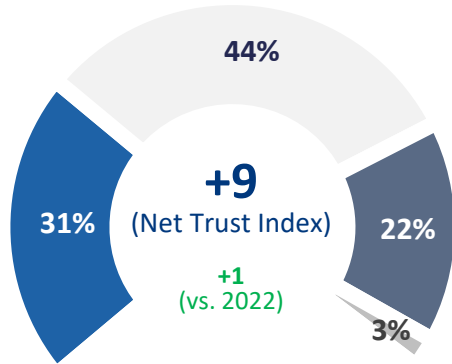


Public trust in market research companies remains a net positive, but data privacy practices continue to be a growing concern.



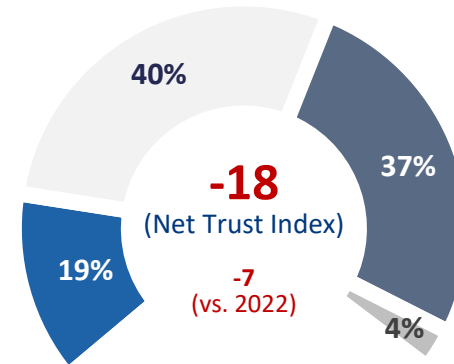
UK

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 8th of 15)

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

Base: Version 1 Respondents (500)

Base: Version 2 Respondents (500)

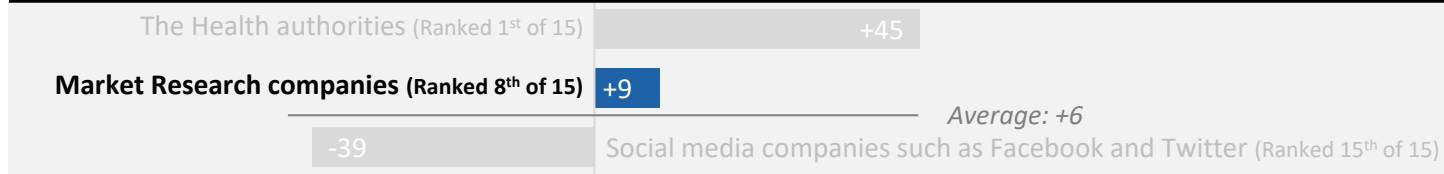


Compared to other surveyed organizations, market research companies rank in the middle for perceived trust but slightly lower in terms of perceived use of personal data.

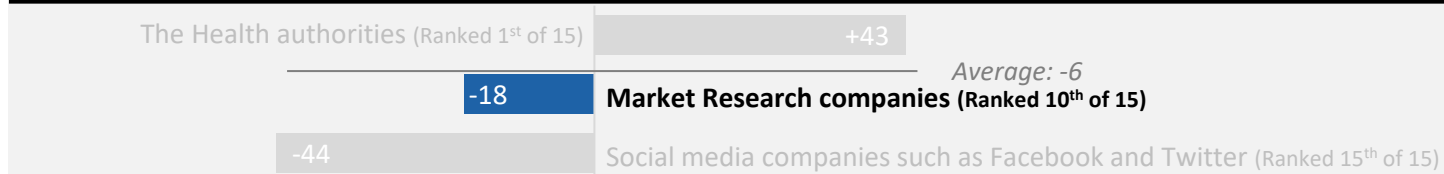


UK

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 in the UK (though levels are unchanged).



UK

23%

(-1% vs. 2022)

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

43%

(No Change vs. 2022)

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

25%

(No Change vs. 2022)

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

35%

(+5% vs. 2022)

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

Appropriate = 5-Completely Appropriate/4

Concerned = 5-Completely Concerned/4

Informed = 5-Completely Informed/4

Benefits = 5-Benefits Completely/4

Base: Version 1 Respondents (500)

Base: Version 2 Respondents (500)

**LEVEL OF
OVERALL TRUST**

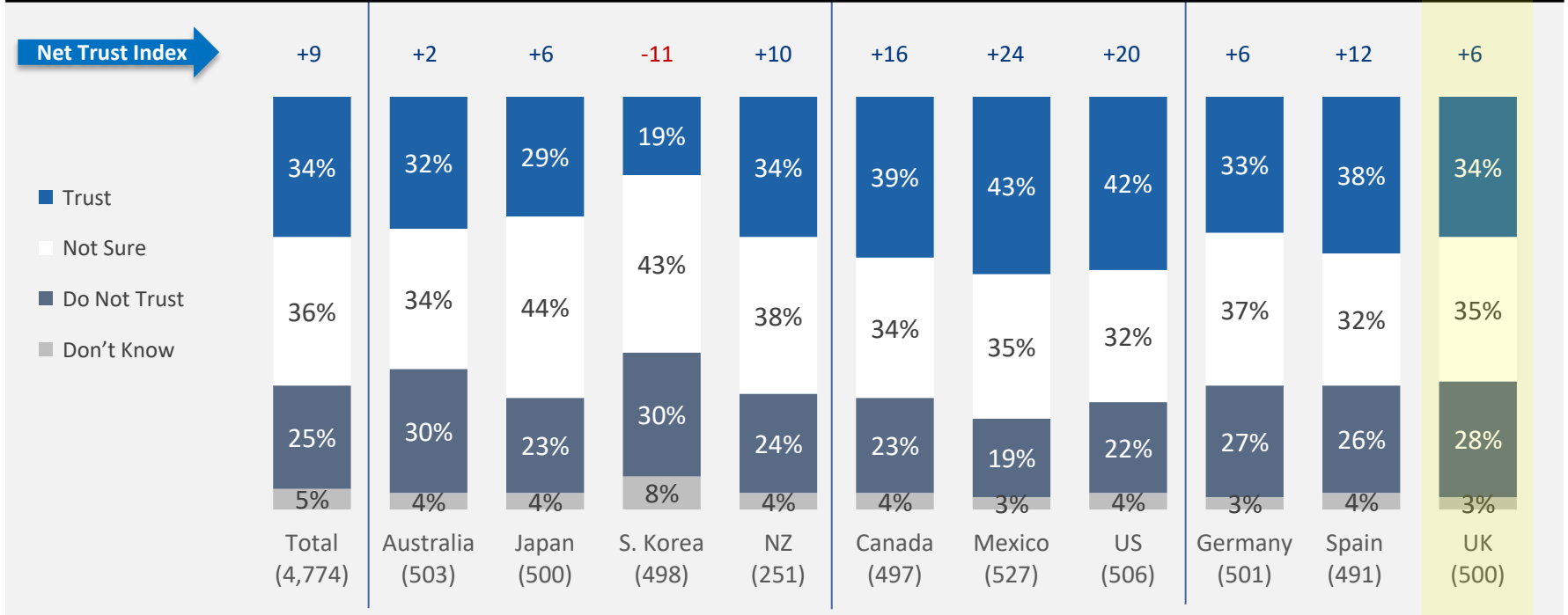




While there's a foundational level of trust in organizations/professionals around the world, most countries also exhibit a sizeable level of distrust. In this respect, the UK is right around the global average.



Average Level of Trust Across Organizations/Professionals†










Net Trust Index = % Trust – % Do Not Trust

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



Across most countries, including the UK, trust in organizations dipped slightly on a net basis.

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
	vs. 2022	-3	-4	-2	-6	-4	+5	-1
% Trust →	2024	33%	32%	29%	19%	39%	42%	33%
	vs. 2022	--	--	--	+1%	-3%	+3%	--
% Do Not Trust →	2024	26%	30%	23%	30%	23%	22%	27%
	vs. 2022	+2%	+4%	+2%	+7%	+1%	-2%	+1%

Net Trust Index = % Trust – % Do Not Trust

*Total based on comparable countries across waves.

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

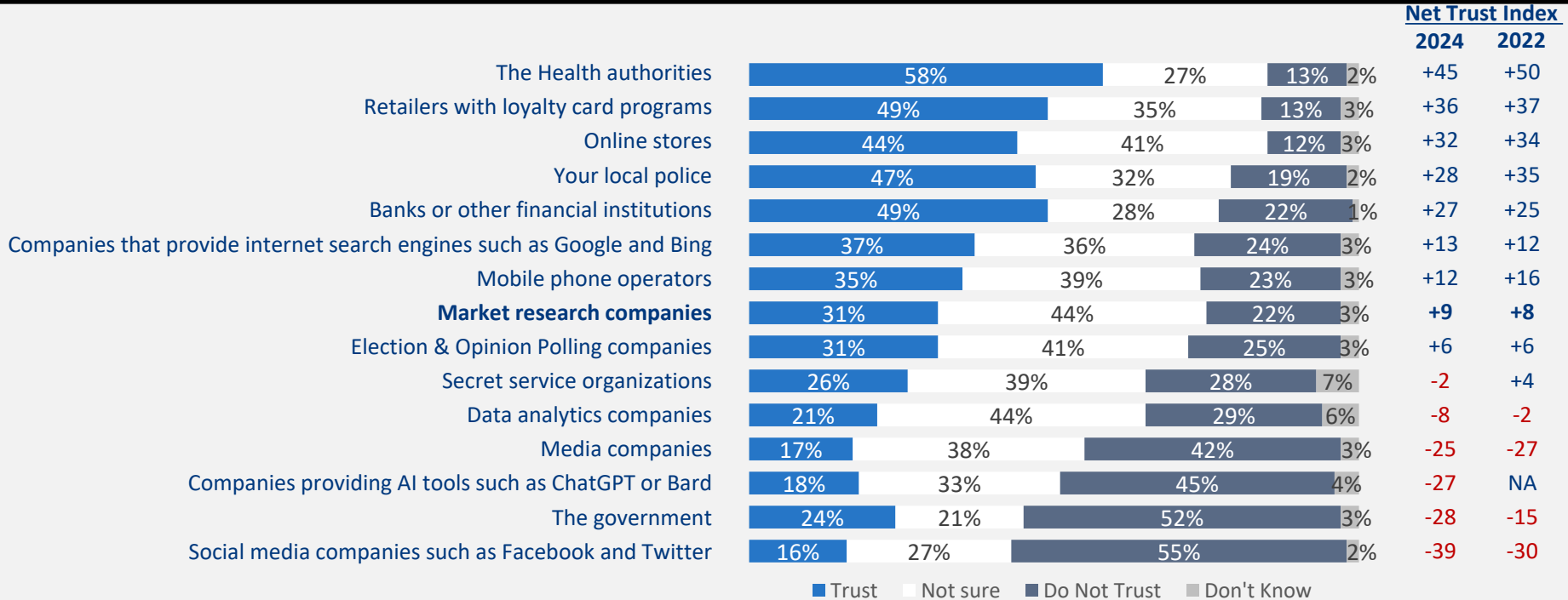


Consumers in the UK once again place the most trust in health, followed by retailers and online stores. Market research companies rank in the middle, while the government, media, social media and companies providing AI tools incur the most doubt.



UK

Level of Trust by Organizations/Professionals



Net Trust Index = % Trust – % Do Not Trust

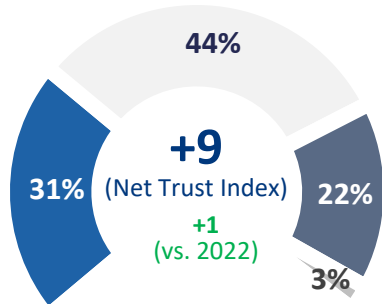


Market research companies continue to command the most trust across the “insights space,” with net trust in data analytics companies declining.

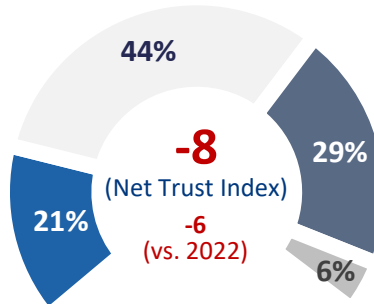


UK

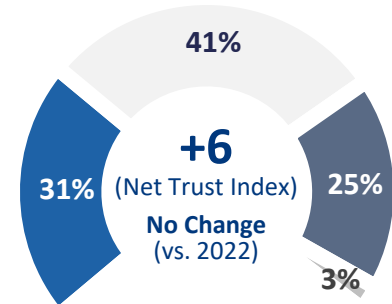
Trust in Market Research



Trust in Data Analytics



Trust in Election & Opinion Polling



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

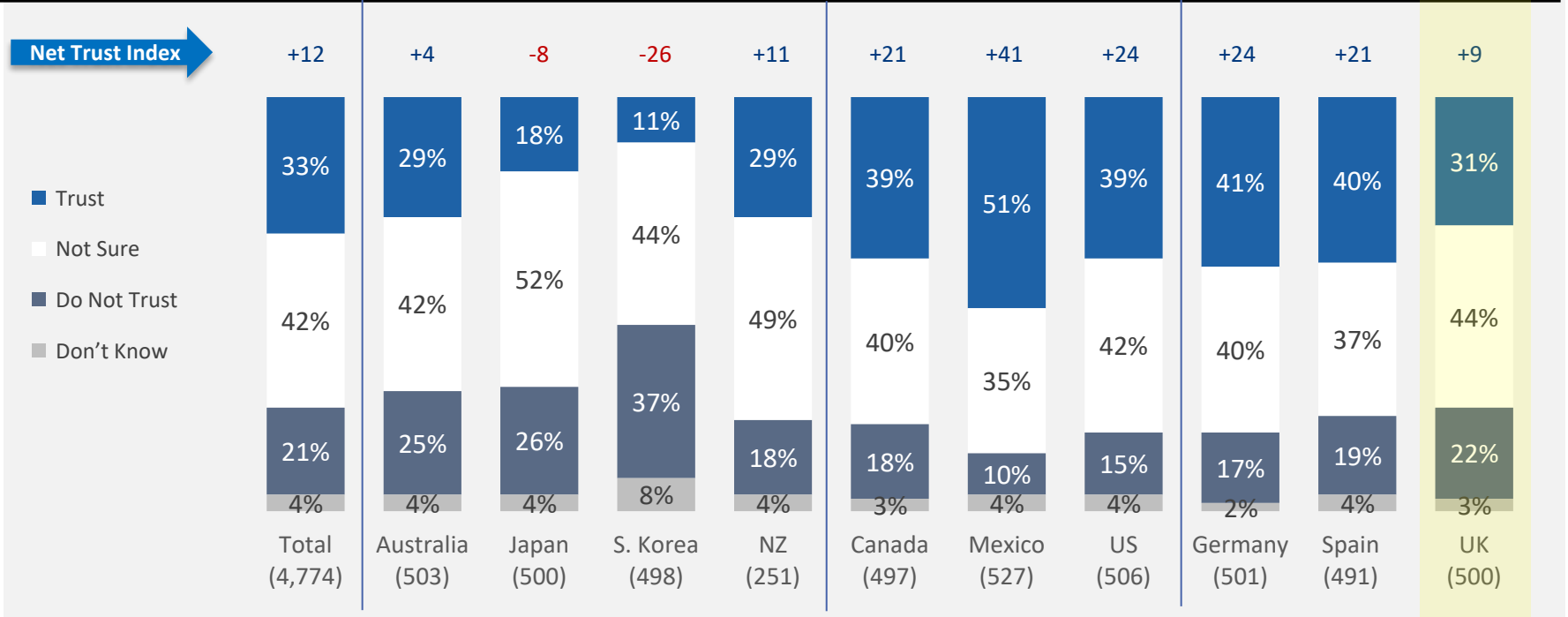
Net Trust Index = % Trust – % Do Not Trust



Trust in market research companies varies considerably by country and cultural bias certainly plays a part in this variation. In the UK, trust falls just below the global average.



Trust in Market Research










Net Trust Index = % Trust – % Do Not Trust



Trust in market research is fairly stable vs. 2022.

Trust in Market Research - Trended to 2022

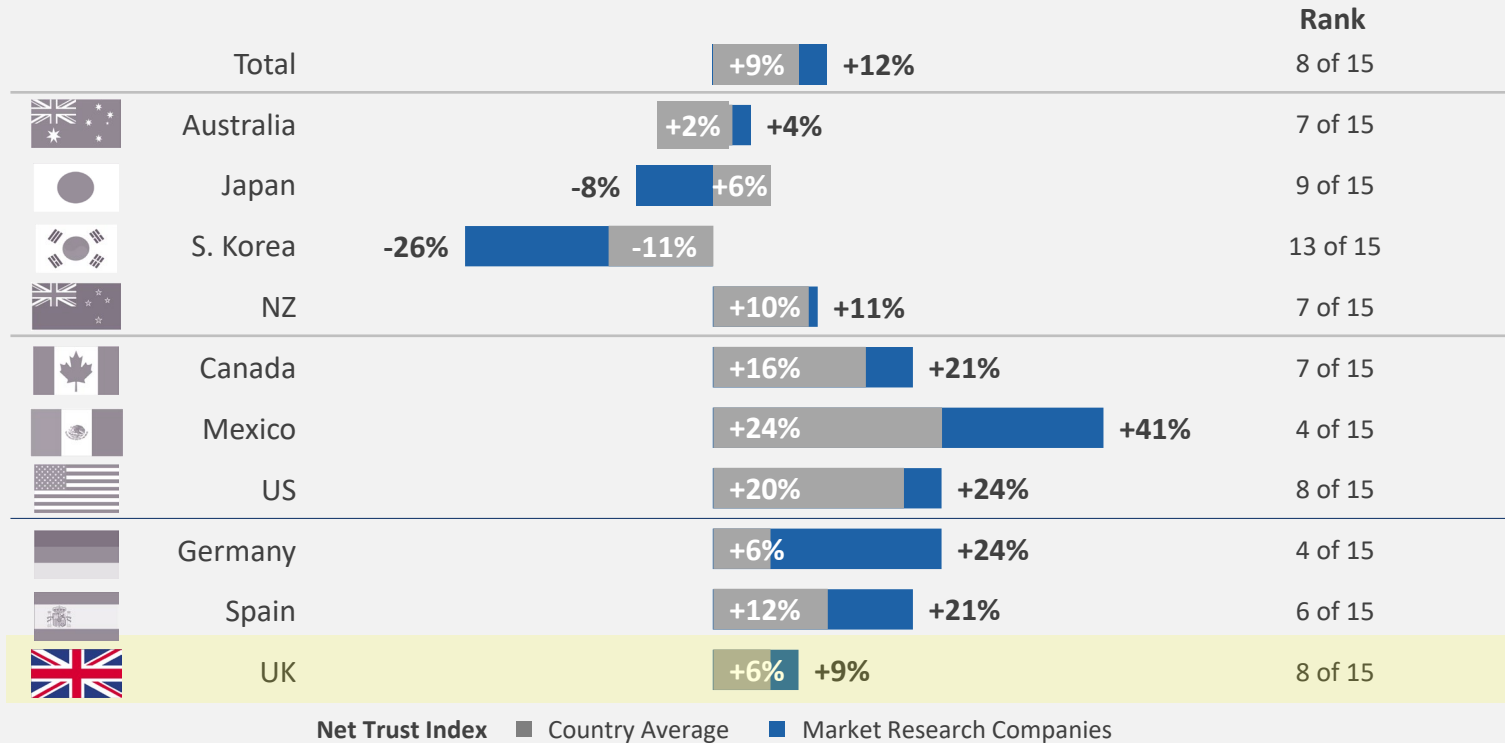
	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index →	2024	+7	+4	-8	-26	+21	+24	+24	+9
	vs. 2022	--	-3	+5	-14	+3	+2	+2	+1
% Trust →	2024	30%	29%	18%	11%	39%	39%	41%	31%
	vs. 2022	+1%	--	+3%	-2%	+3%	+2%	+5%	-2%
% Do Not Trust →	2024	23%	25%	26%	37%	18%	15%	17%	22%
	vs. 2022	+2%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

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



Trust in market research for the UK typically ranks in the middle of the pack.

Trust in Market Research (vs. Country Average)



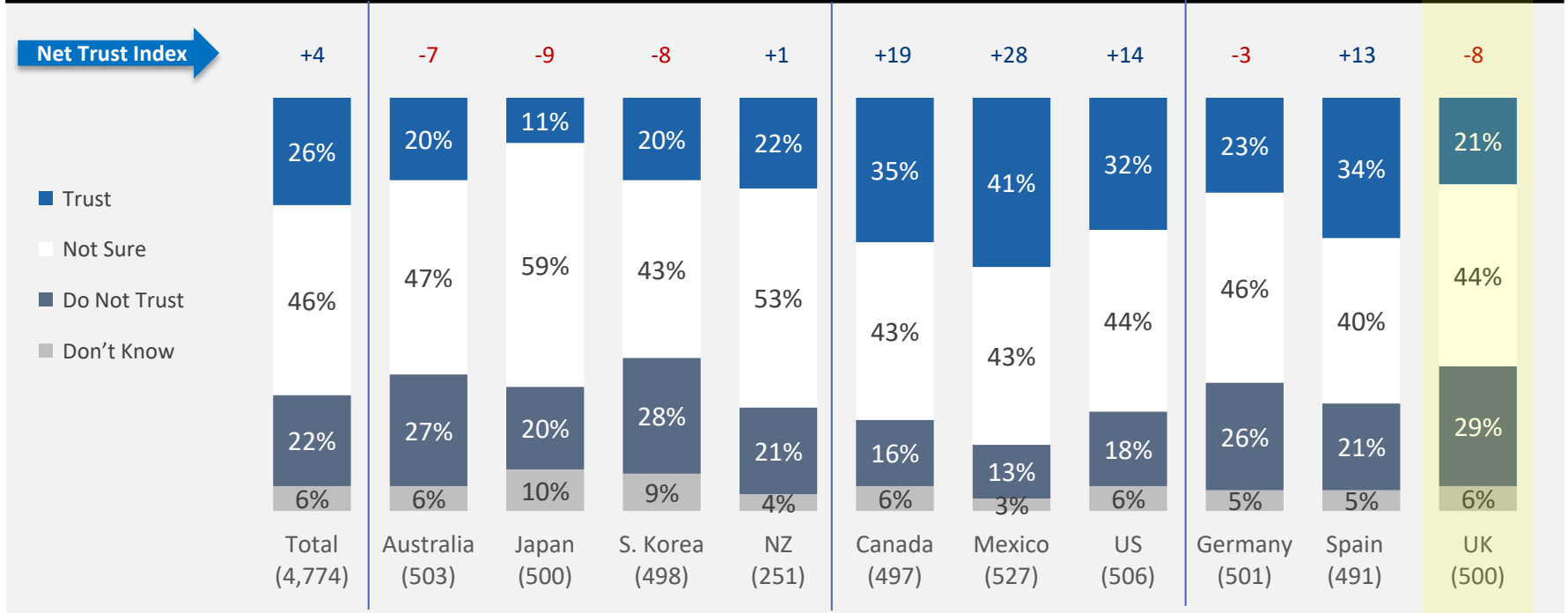
Net Trust Index = % Trust – % Do Not Trust



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 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%	--

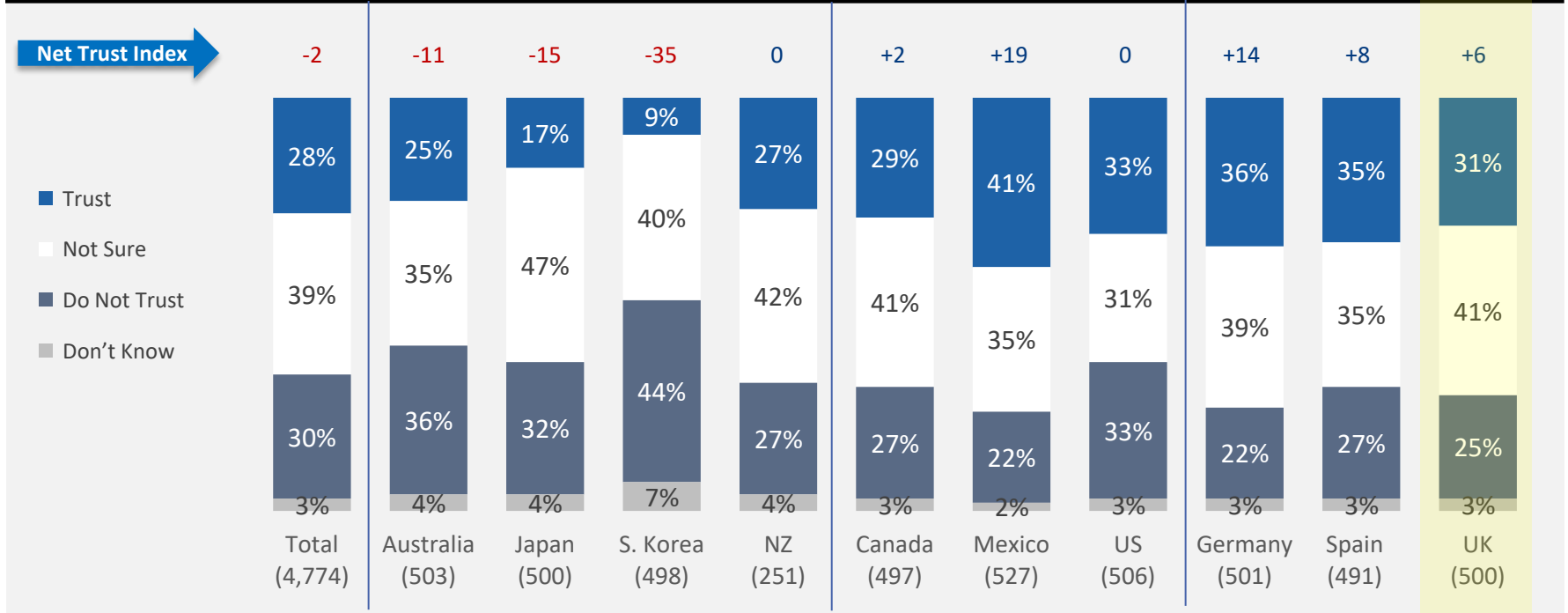
Net Trust Index = % Trust – % Do Not Trust
*Total based on comparable countries across waves.



In the UK, net trust in election & polling is above the global average.



Trust in Election & Opinion Polling










Net Trust Index = % Trust – % Do Not Trust



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

Trust in Election & Opinion Polling - Trended to 2022

	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index →	2024	-6	-11	-15	-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 still more apparent for businesses than for individuals.

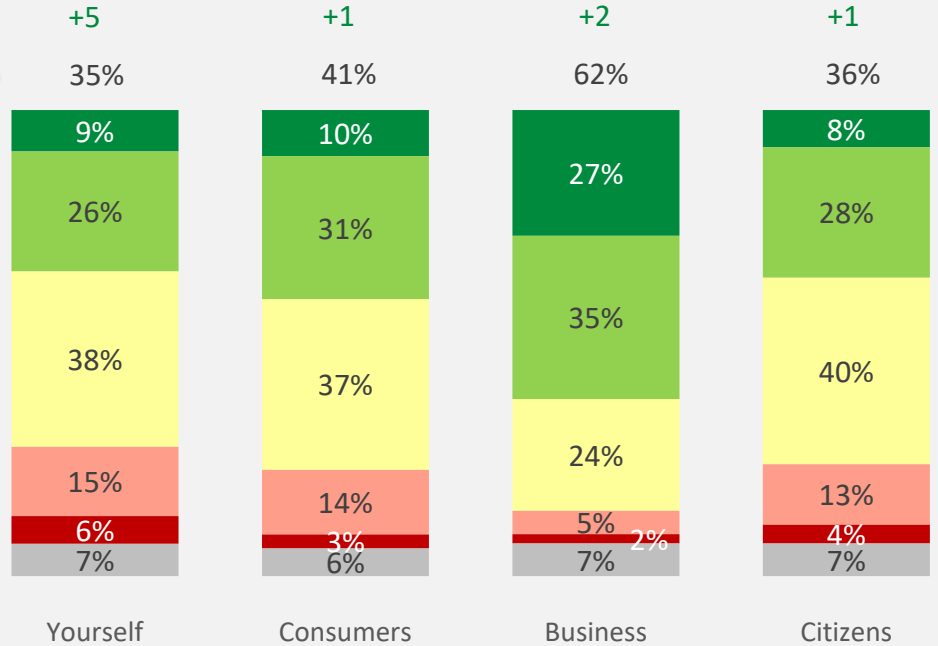


Extent Market Research is Perceived to be Beneficial



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

Vs. 2022
Top 2 Box →

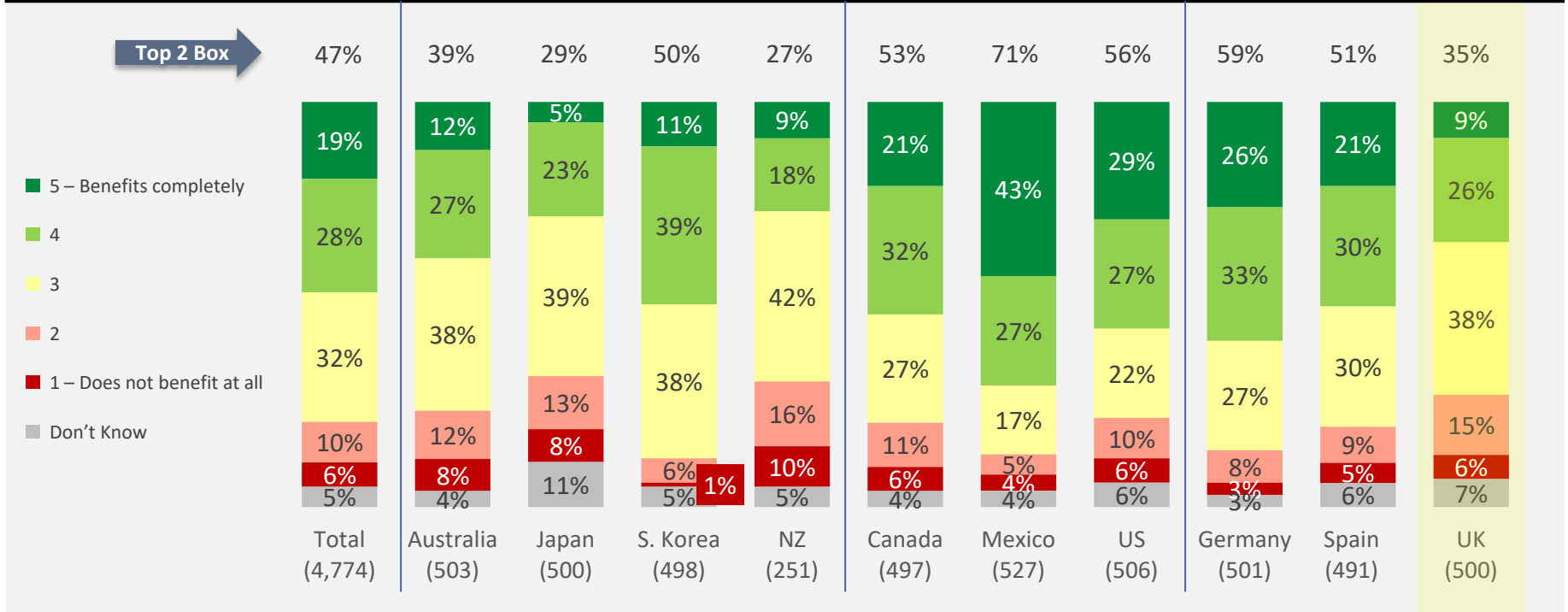




Overall, less than half feel that market research benefits them – this negative sentiment is driven by those in Australia, Japan, New Zealand, and the UK.



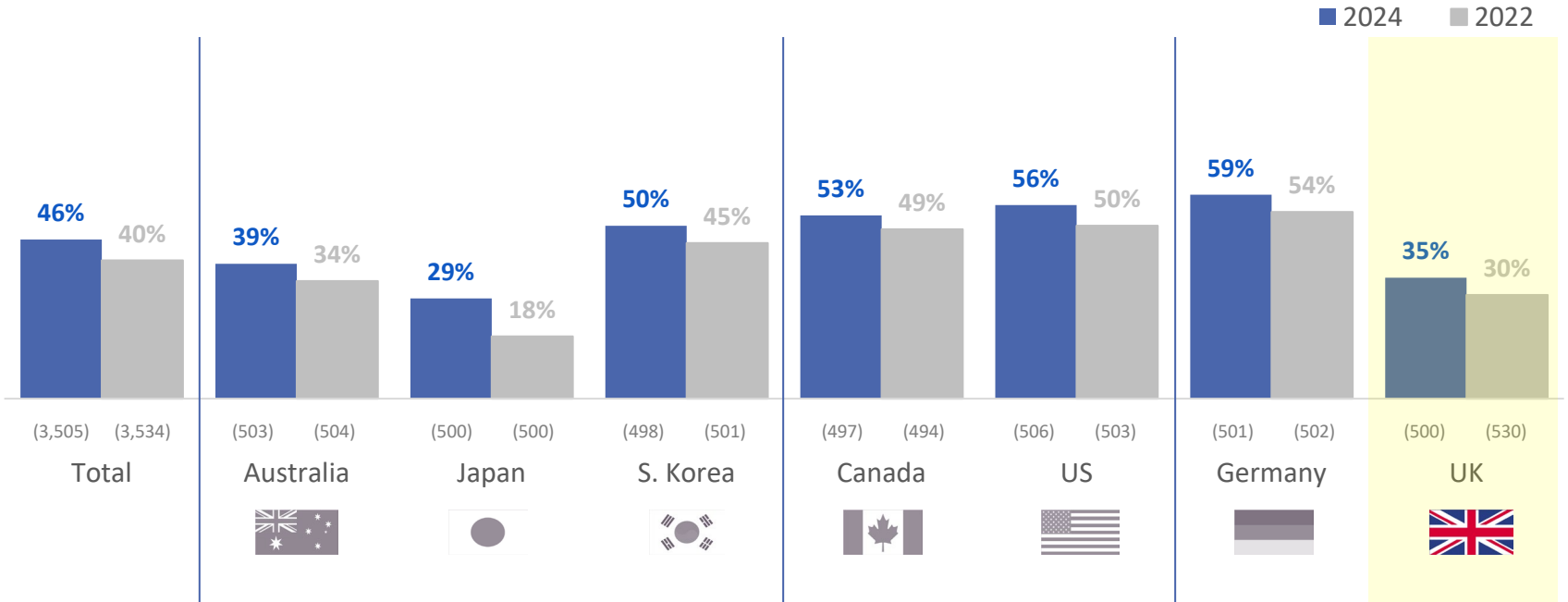
Extent Market Research is Perceived to be Beneficial to Yourself





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

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

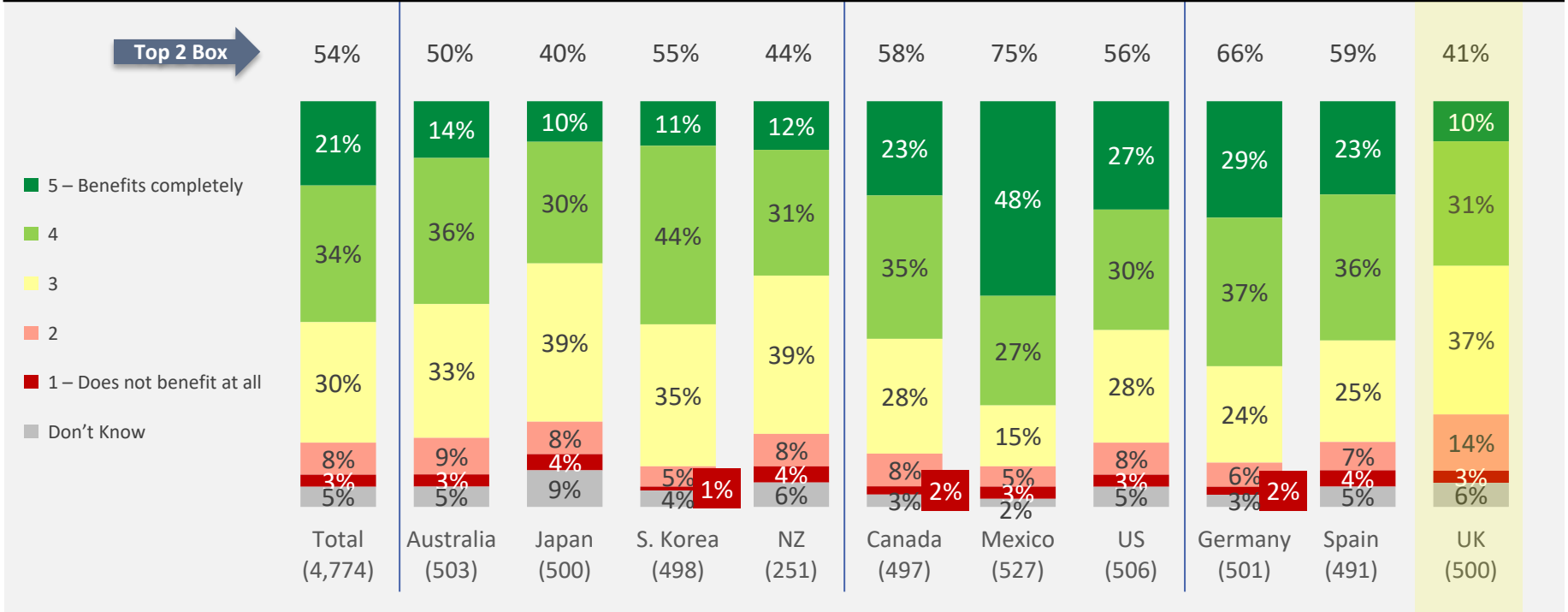




Most recognize some benefit of market research to consumers in the UK.



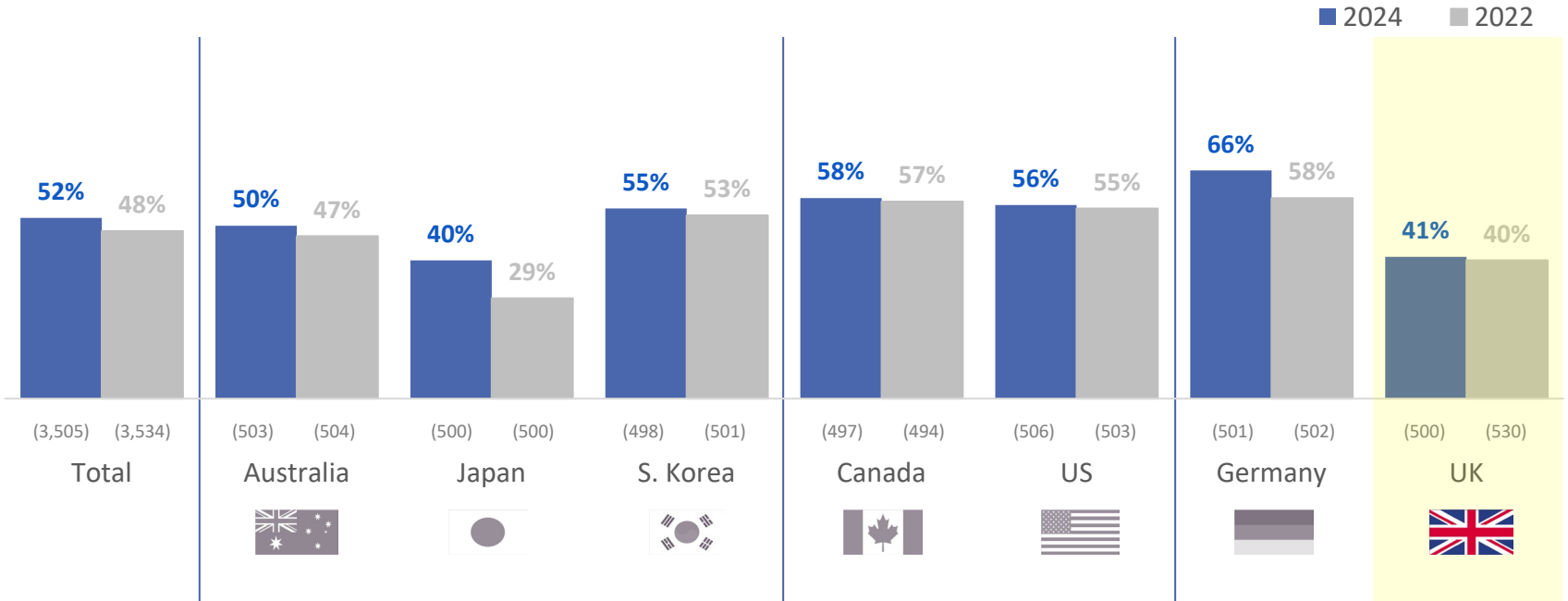
Extent Market Research is Perceived to be Beneficial to Consumers





Globally, the perceived benefit of market research to consumers remains positive and stable vs. 2022.

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

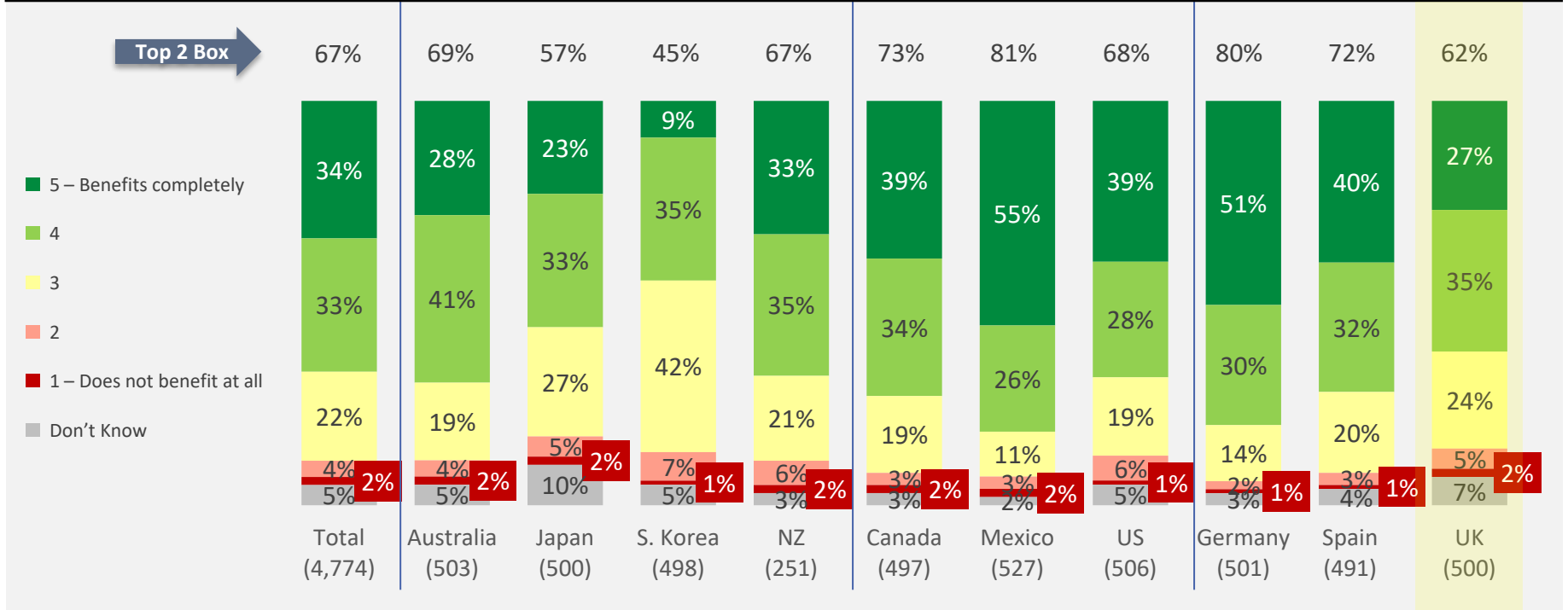




Many in the UK consider market research highly beneficial to businesses.



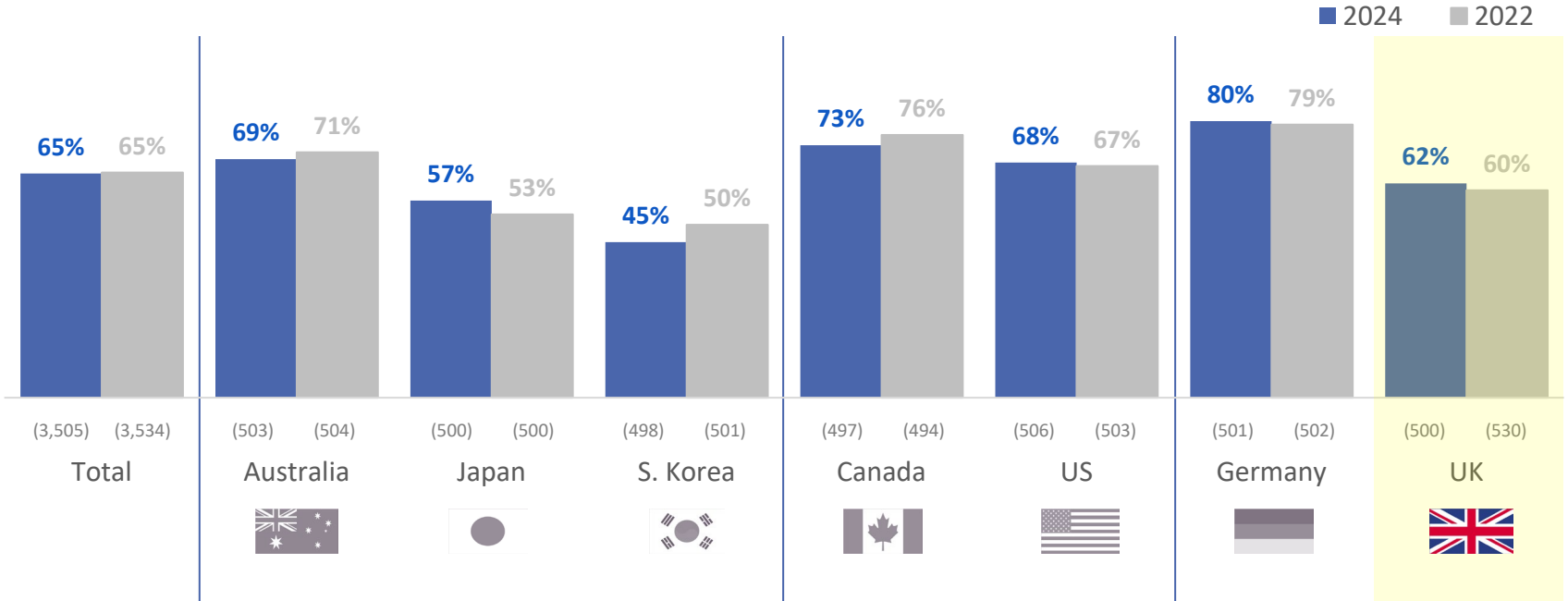
Extent Market Research is Perceived to be Beneficial to Business





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

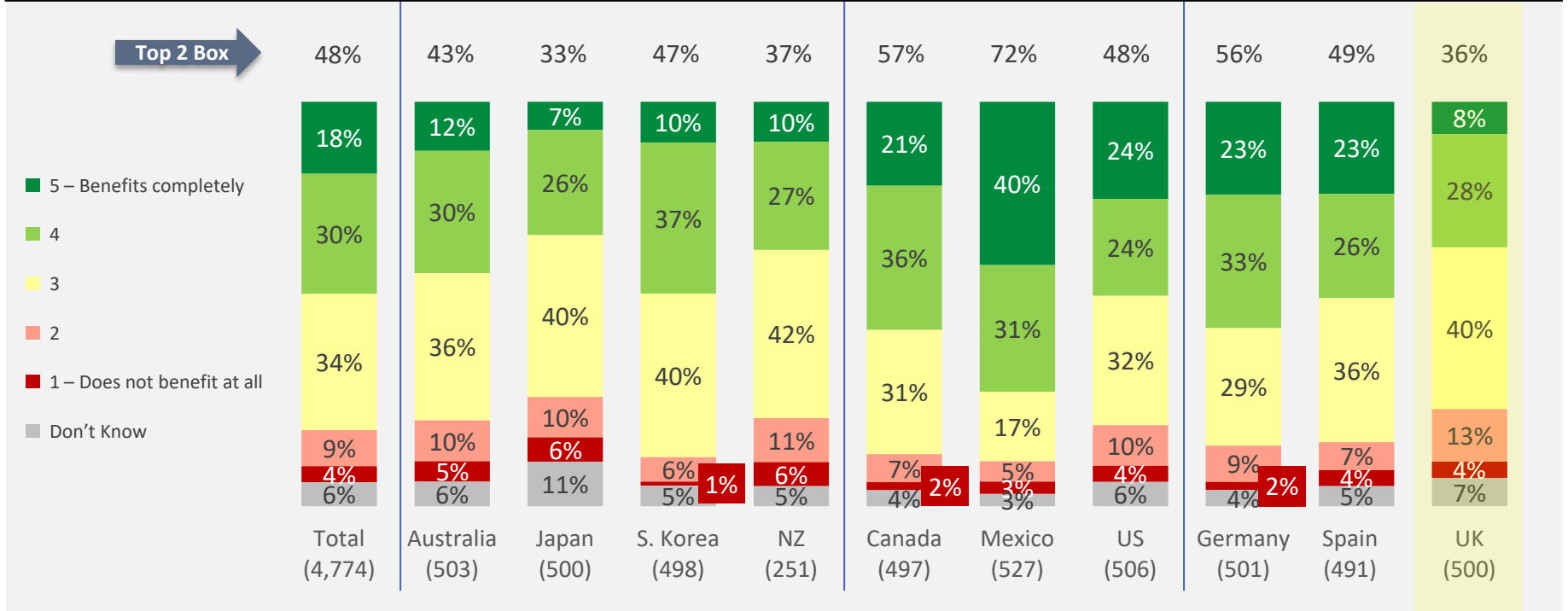




Nearly half recognize the benefits of market research to citizens, with Mexico showing the most conviction, while Japan, New Zealand, and the UK exhibit the least.



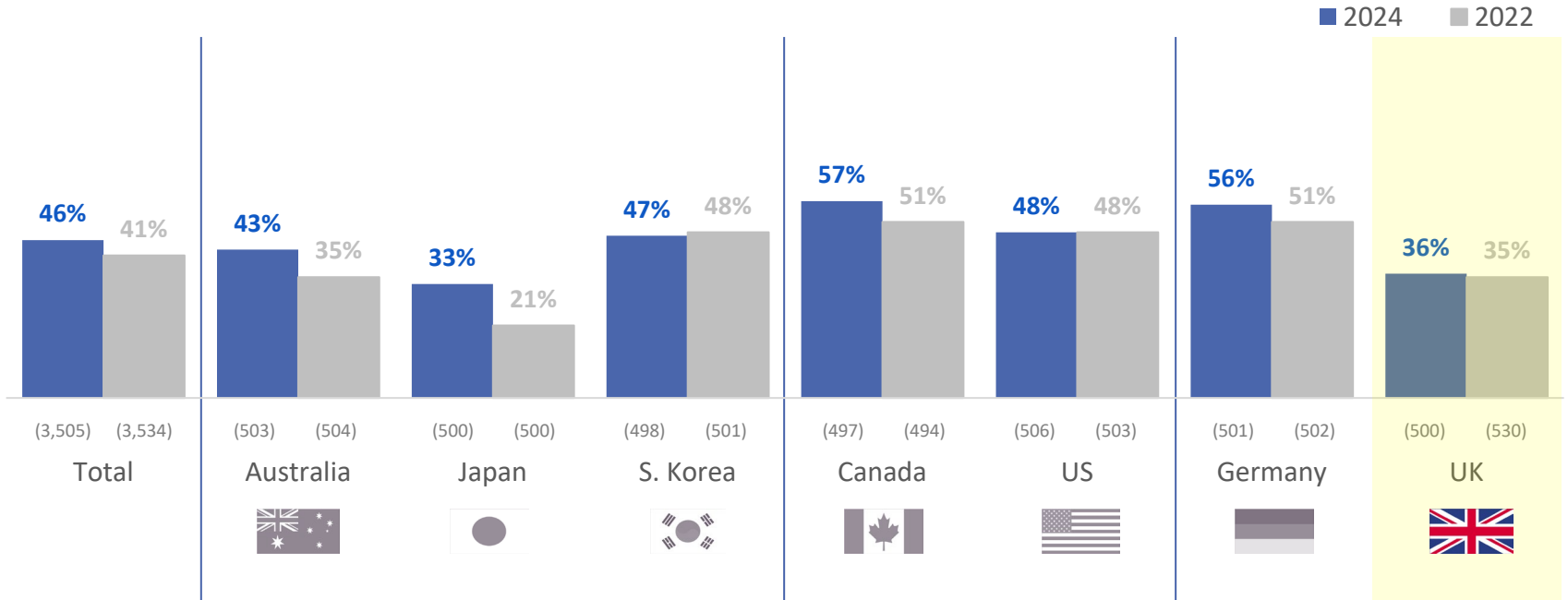
Extent Market Research is Perceived to be Beneficial to Citizens





Sentiment towards the benefits of market research to citizens is somewhat low but consistent with 2022 in the UK.

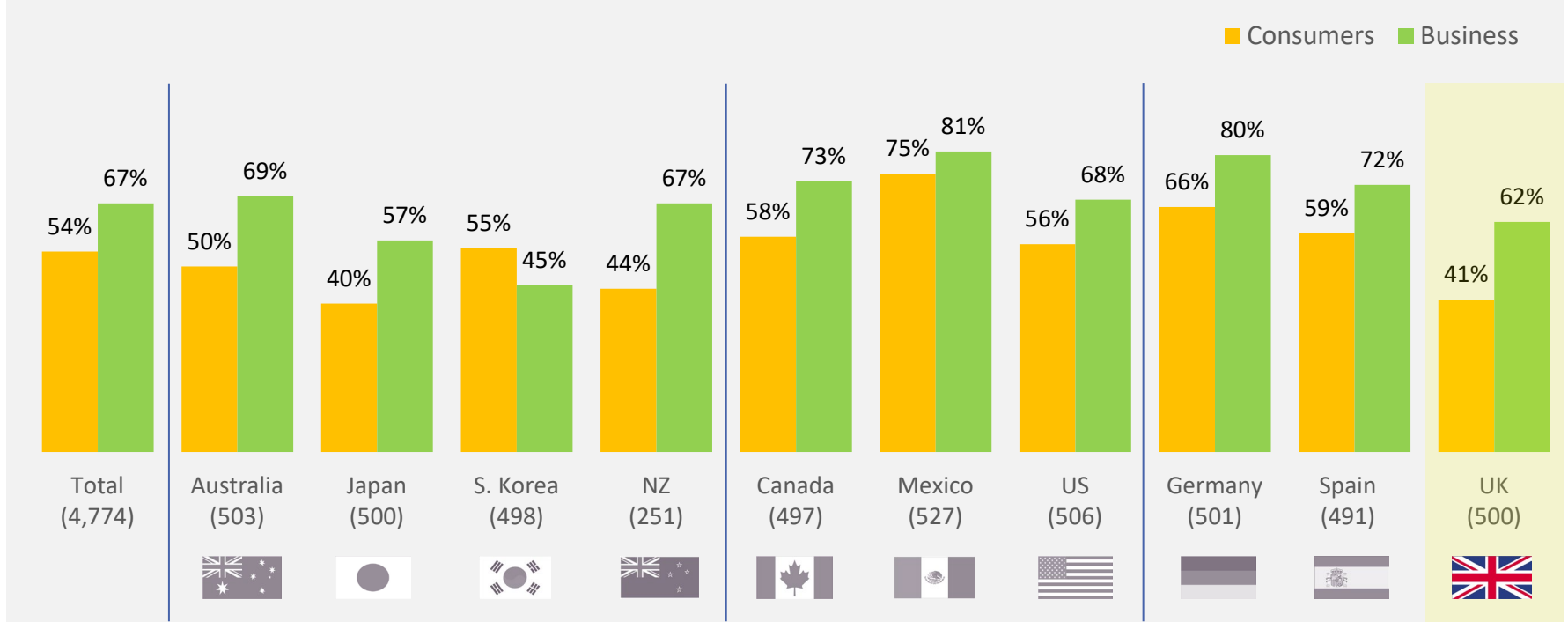
Extent Market Research is Perceived to be Beneficial to Citizens (Top 2 Box %) - Trended to 2022





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

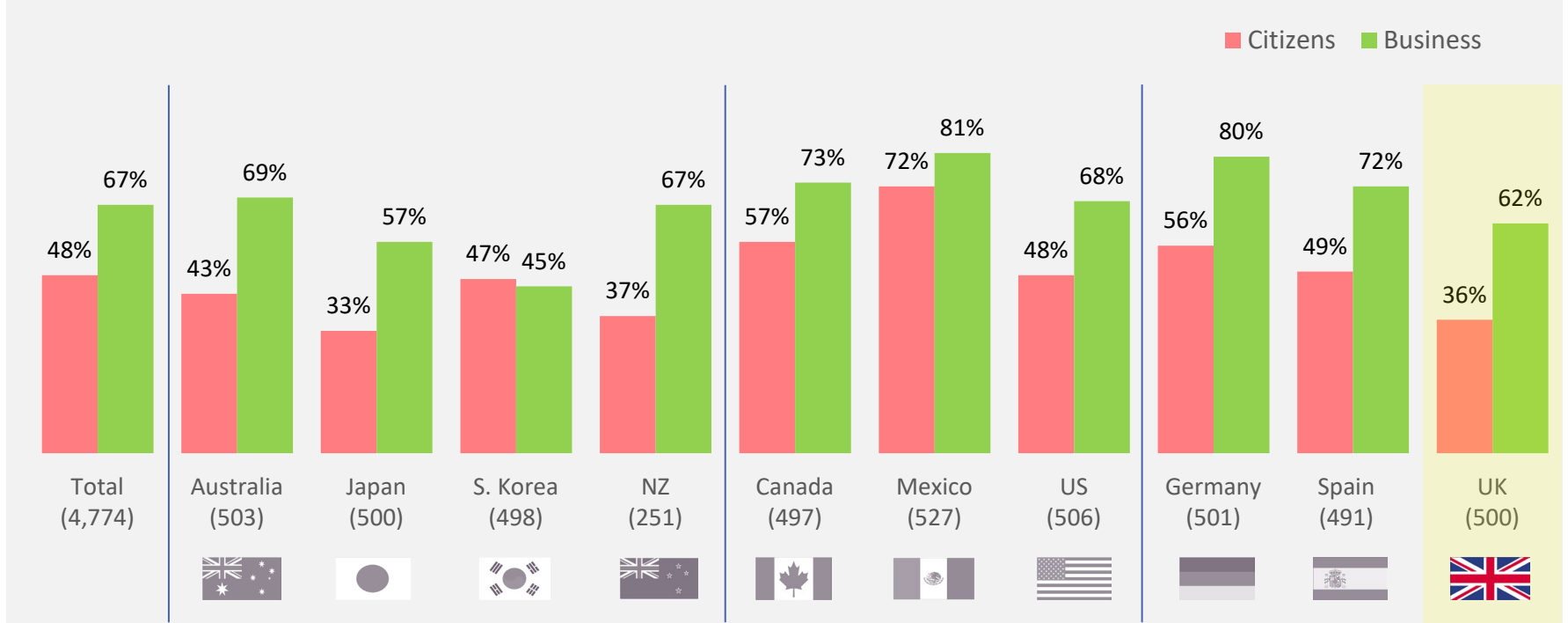
Extent Market Research is Perceived to be Beneficial to Consumers vs. Business (Top 2 Box)



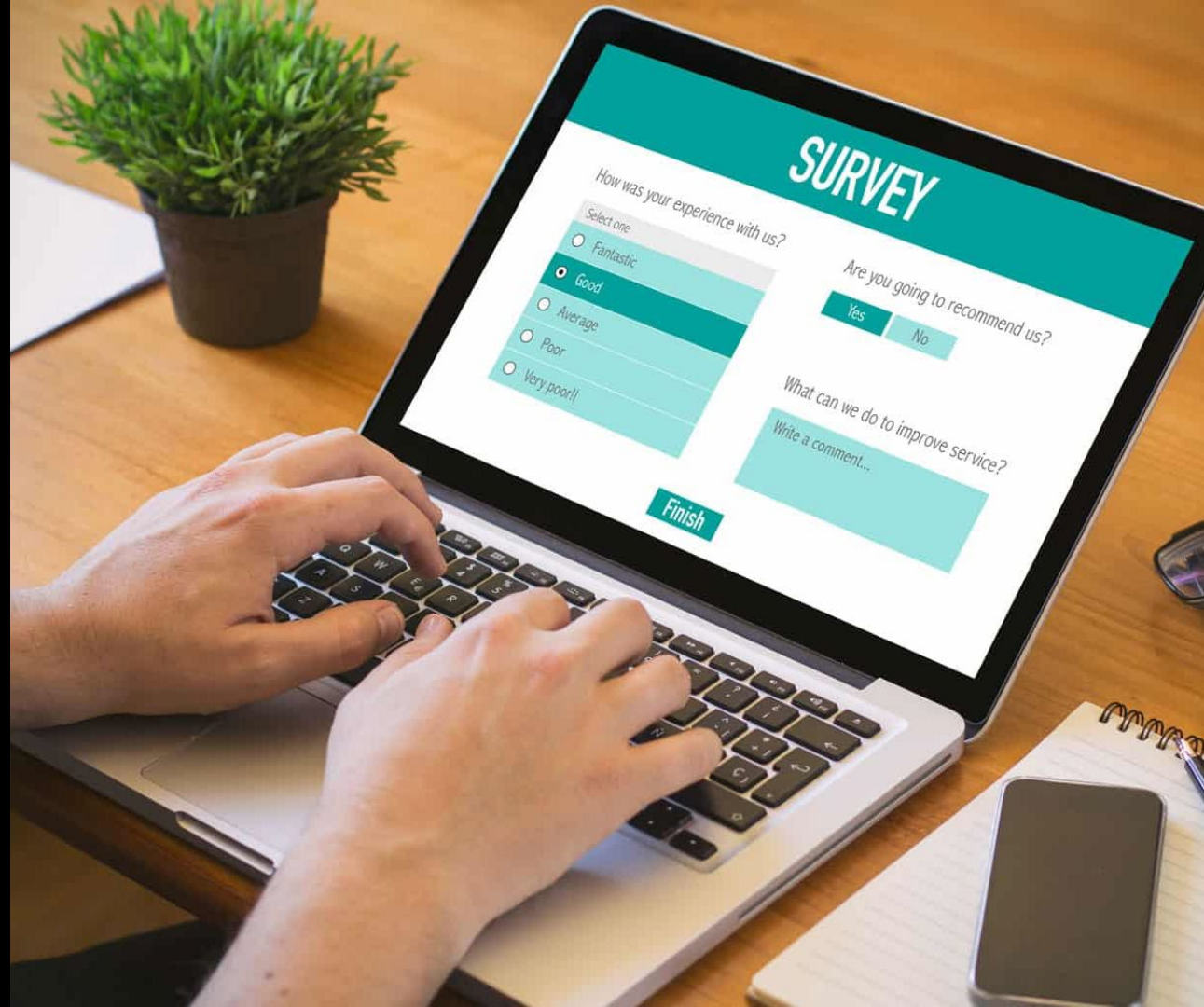


Likewise, market research is considered much more beneficial to businesses than to citizens on a global basis.

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



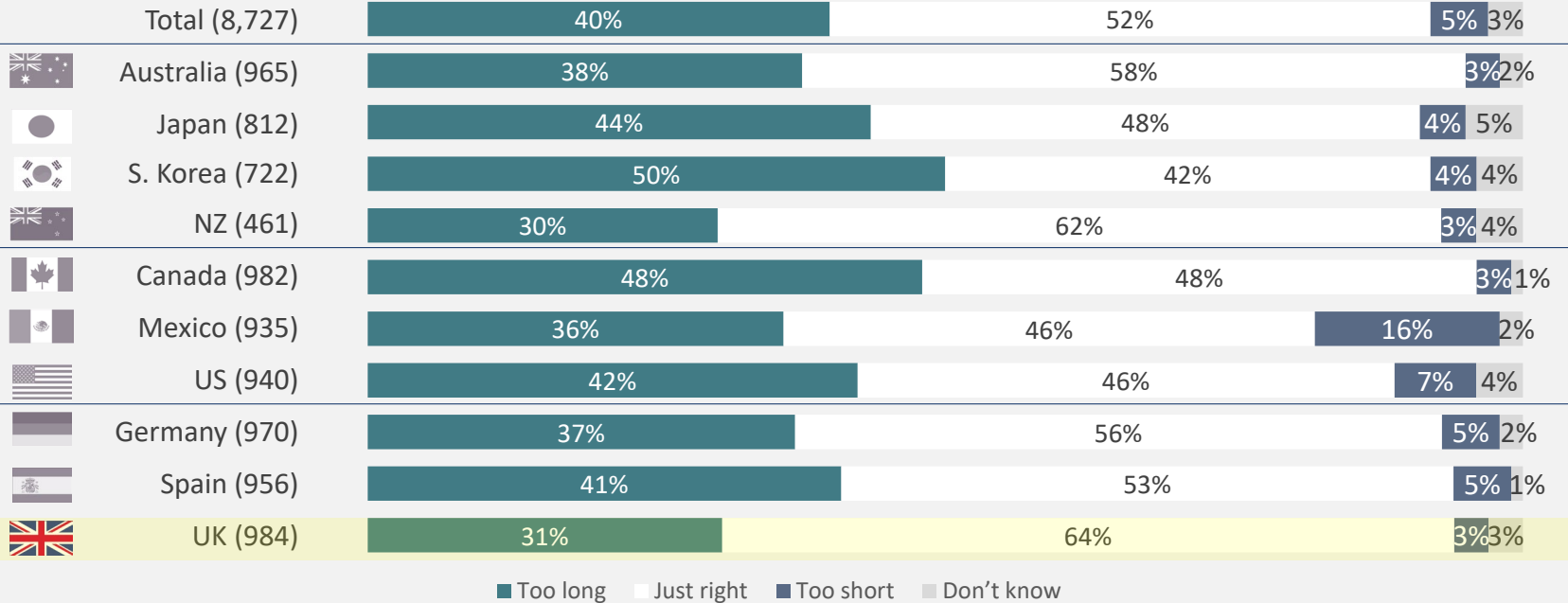
REACTIONS TO THE PARTICIPANT EXPERIENCE





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

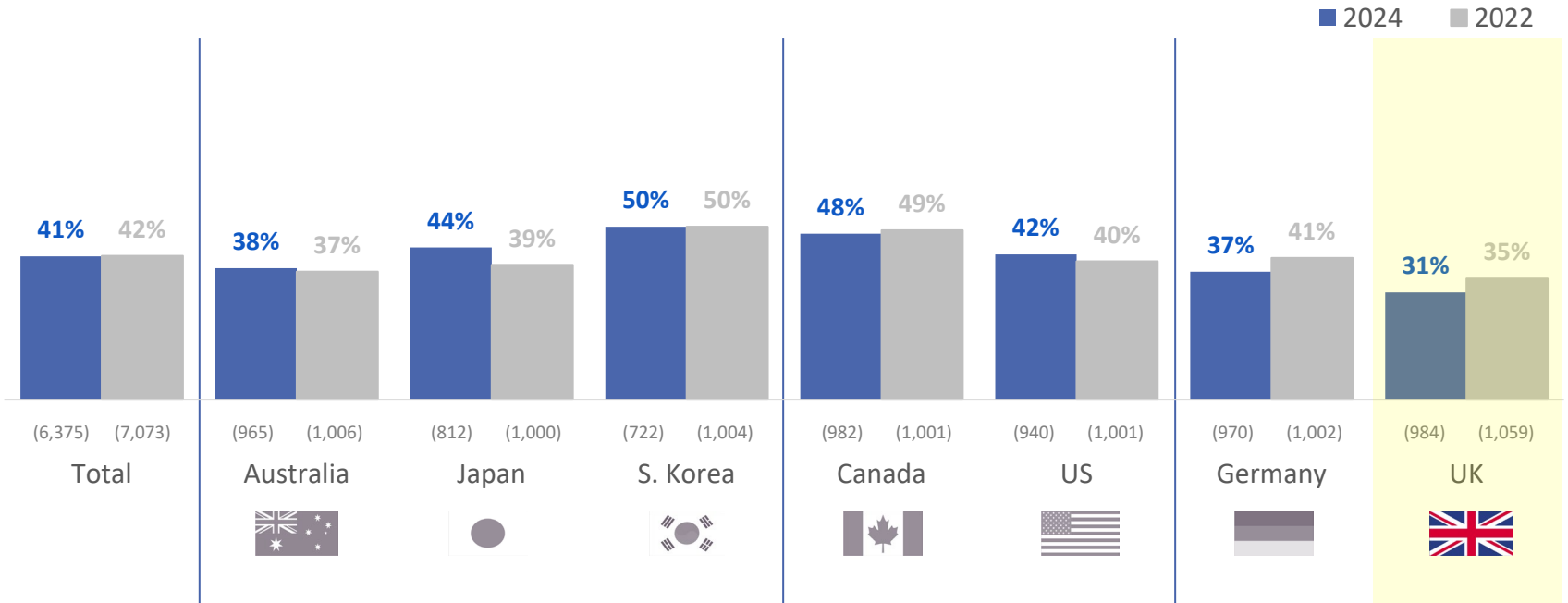
Perception of Survey Length





Survey length concerns are largely consistent with 2022.

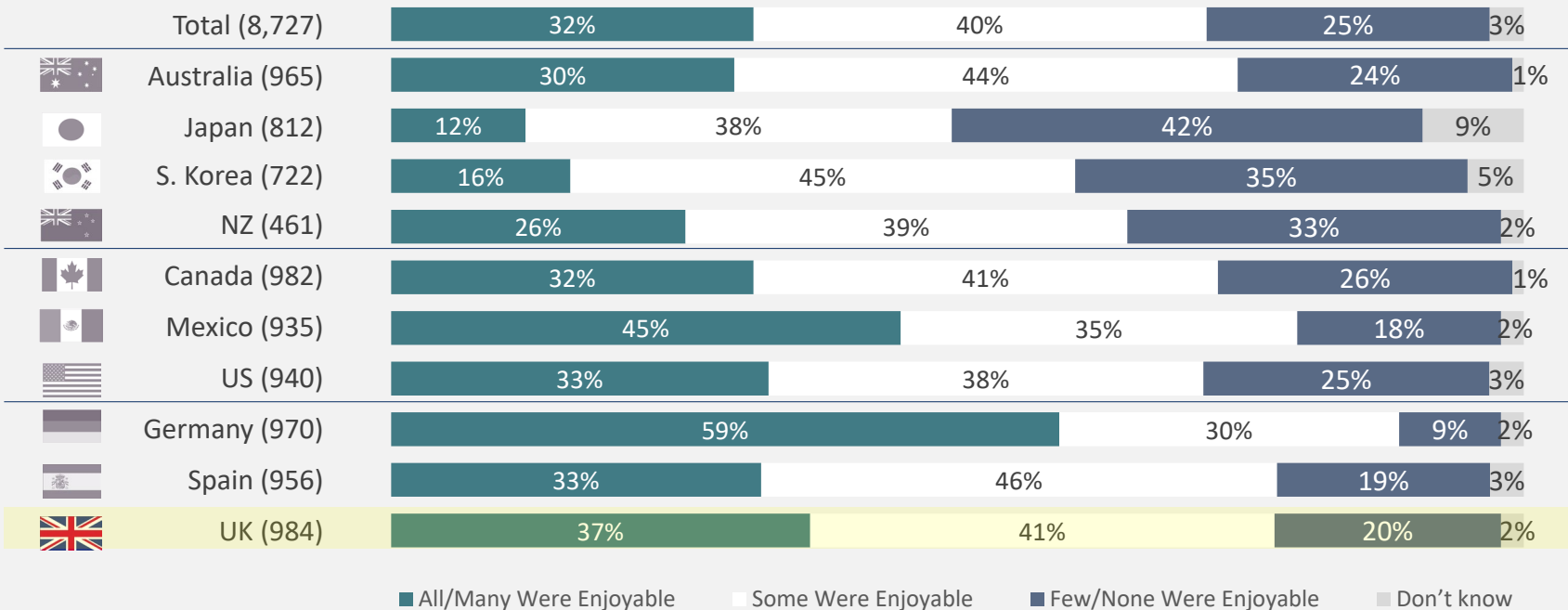
Perception of Survey Length (Too Long) - Trended to 2022





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

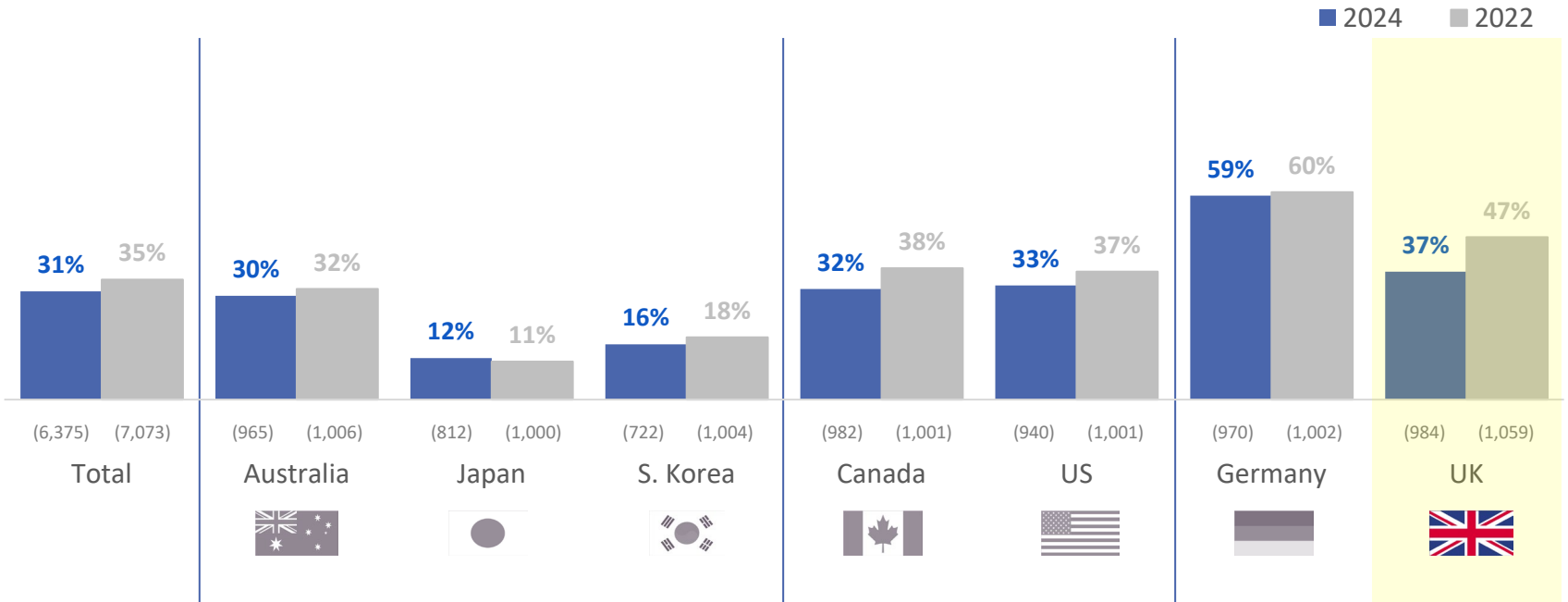
Perception of Survey Enjoyability





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

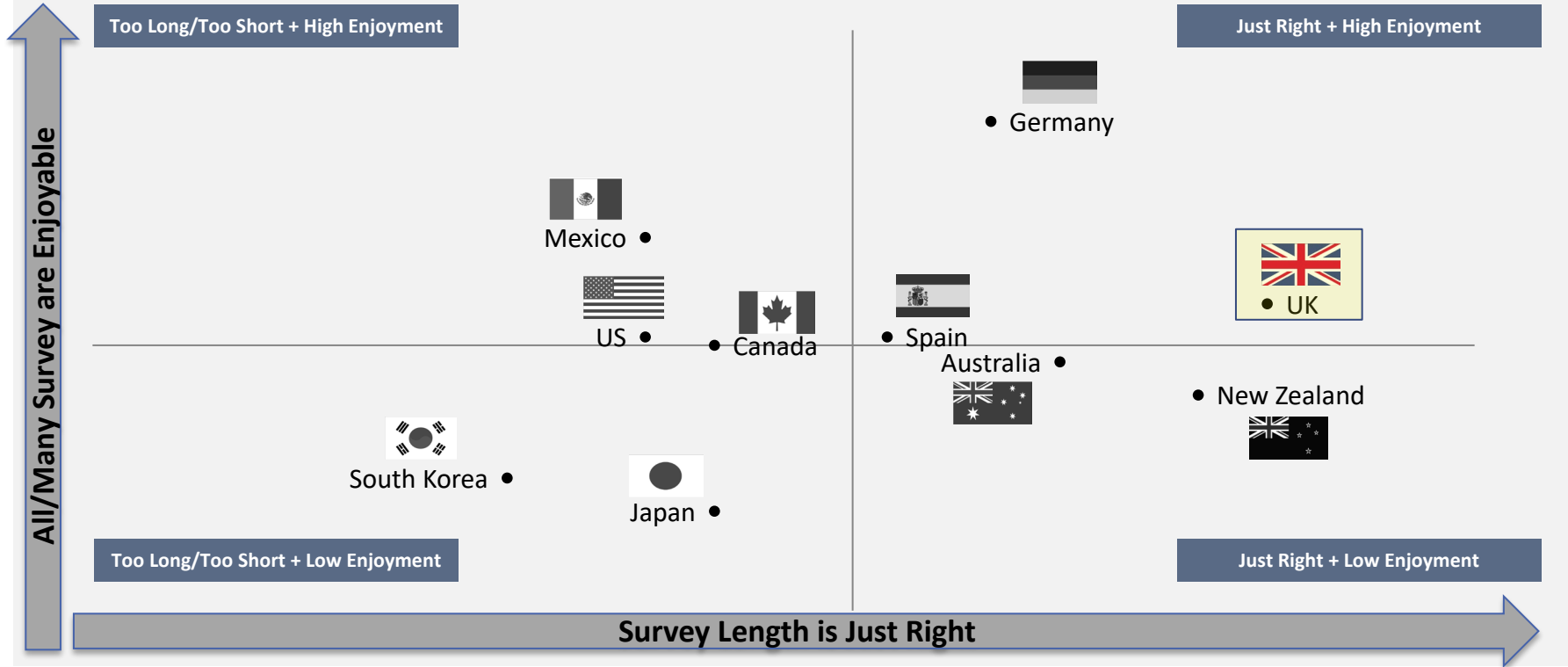
Perception of Survey Enjoyability (All/Many Were Enjoyable) - Trended to 2022





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

Relationship Between Survey Length & Enjoyability



PERSONAL DATA USE





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



UK



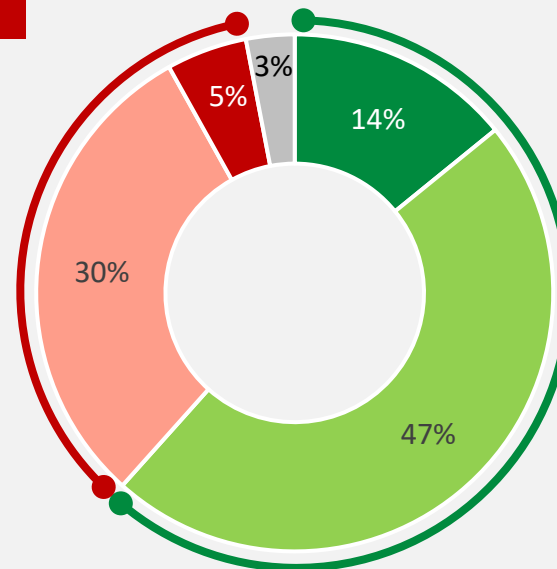
Familiarity with Personal Data Collection & Use

Not Very/At All Familiar

Very/Somewhat Familiar

2024: 36%

2024: 61%



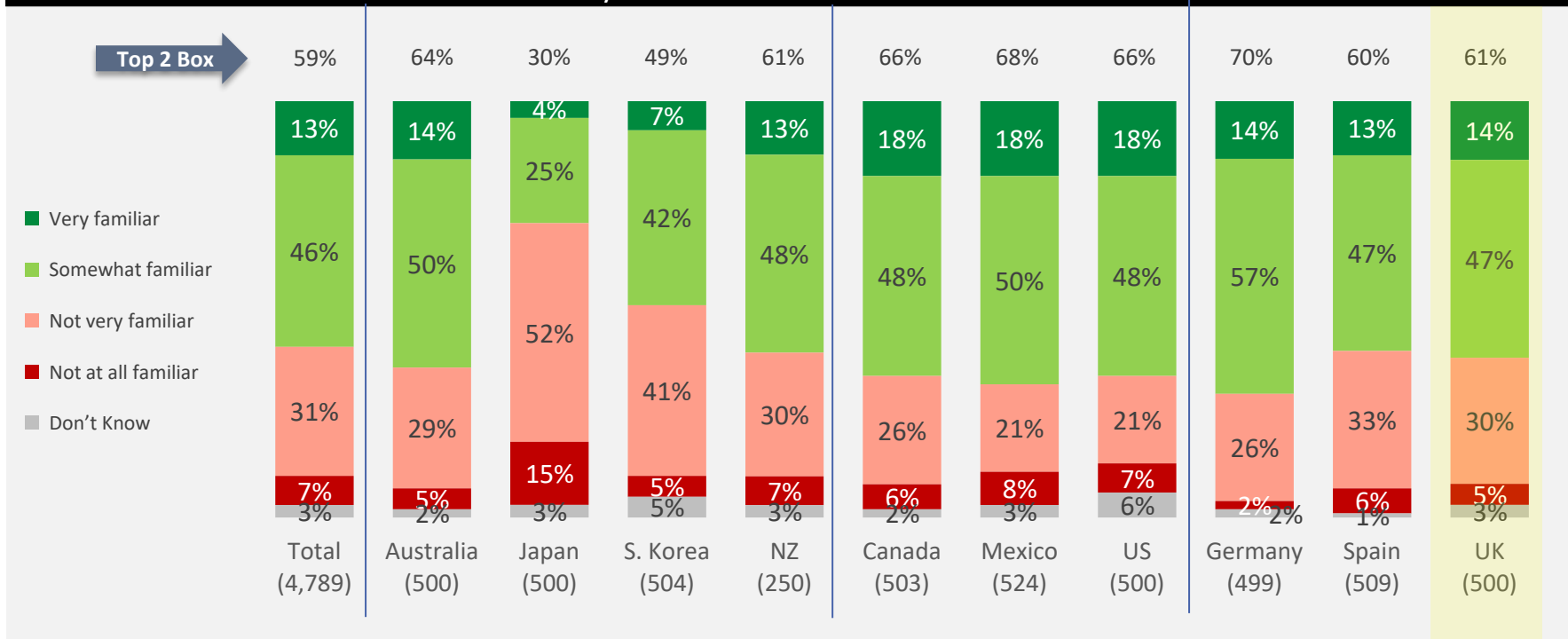
Very familiar Somewhat familiar Not very familiar Not at all familiar Don't Know



Knowledge of personal data collection and usage practices in the UK is similar to the global average.



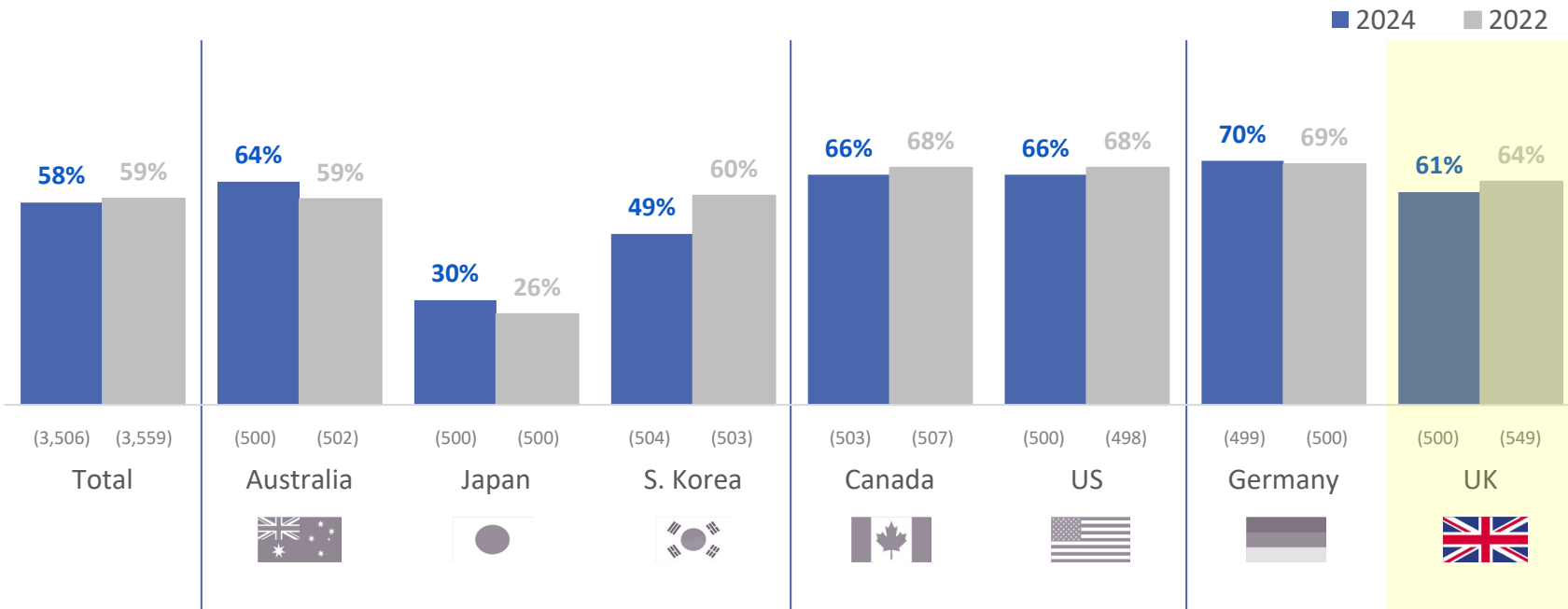
Familiarity with Personal Data Collection & Use





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

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





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



UK



Level of Concern Regarding Misuse of Personal Data

Not Very/At All Concerned

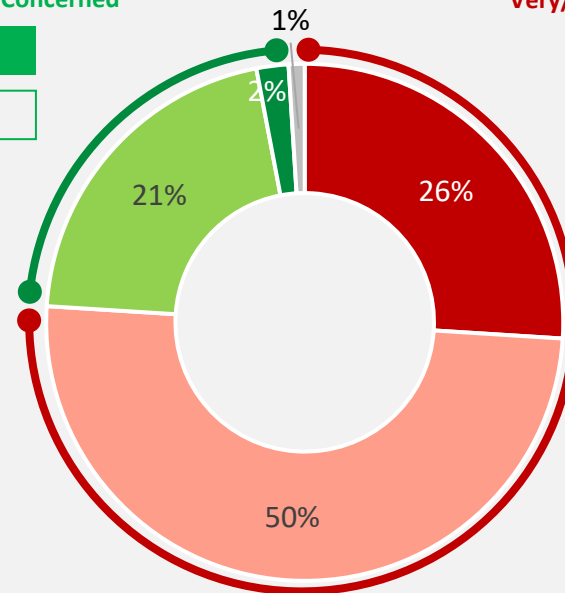
2024: 23%

2022: 16%

Very/Somewhat Concerned

2024: 76%

2022: 83%



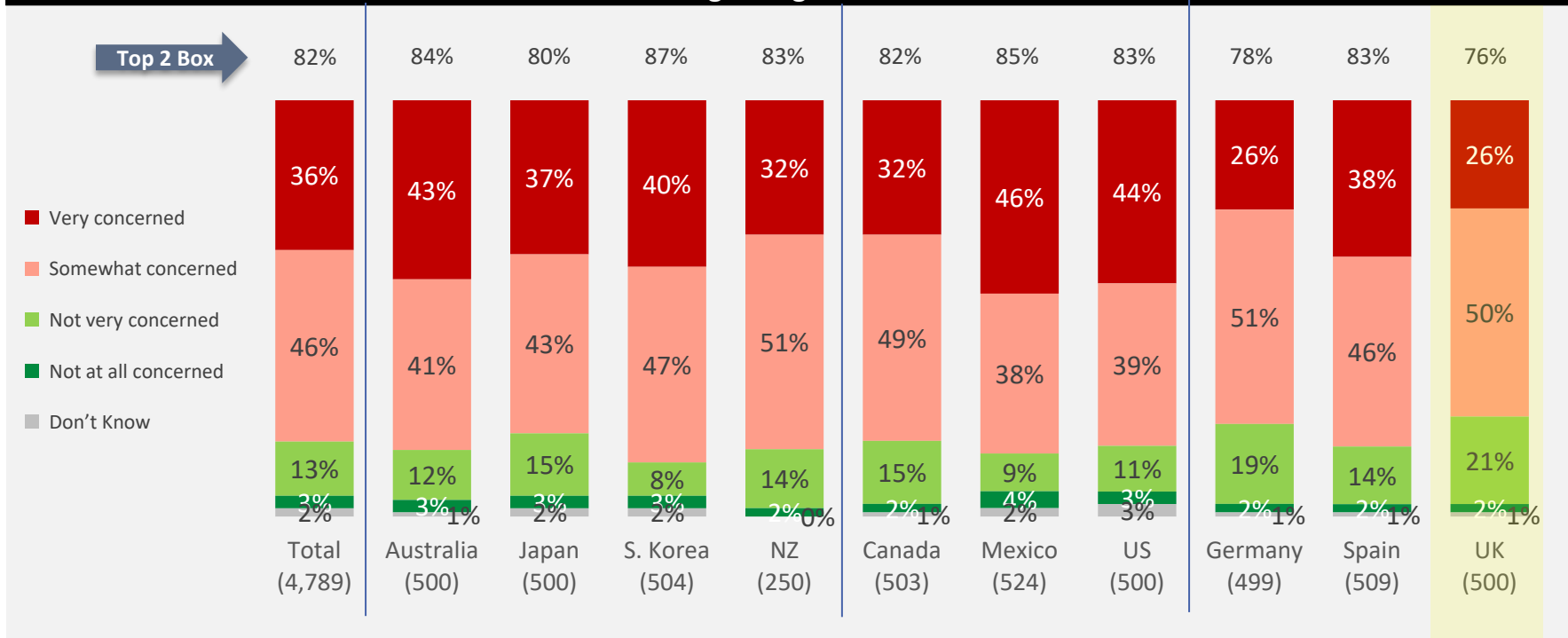
- Very concerned
- Somewhat concerned
- Not very concerned
- Not at all concerned
- Don't know/Prefer not to say



Concerns about the misuse of personal data in the UK are lower than all other countries.



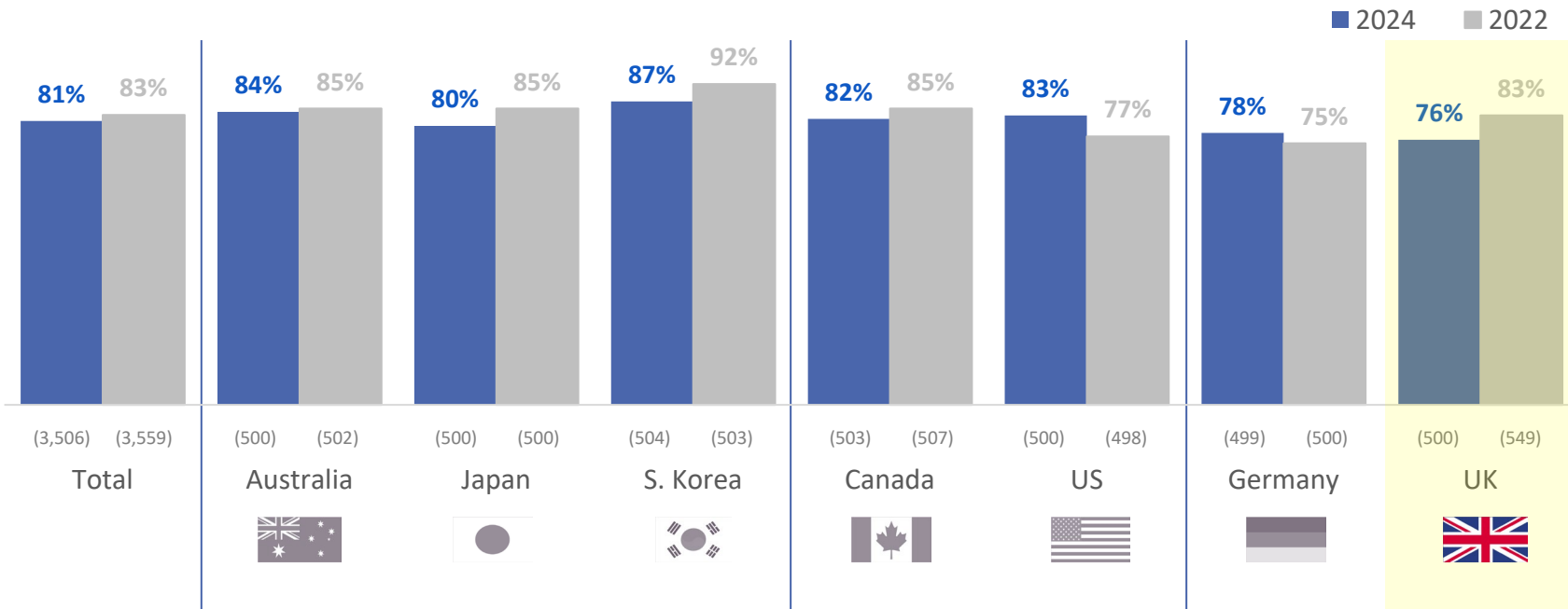
Level of Concern Regarding Misuse of Personal Data





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

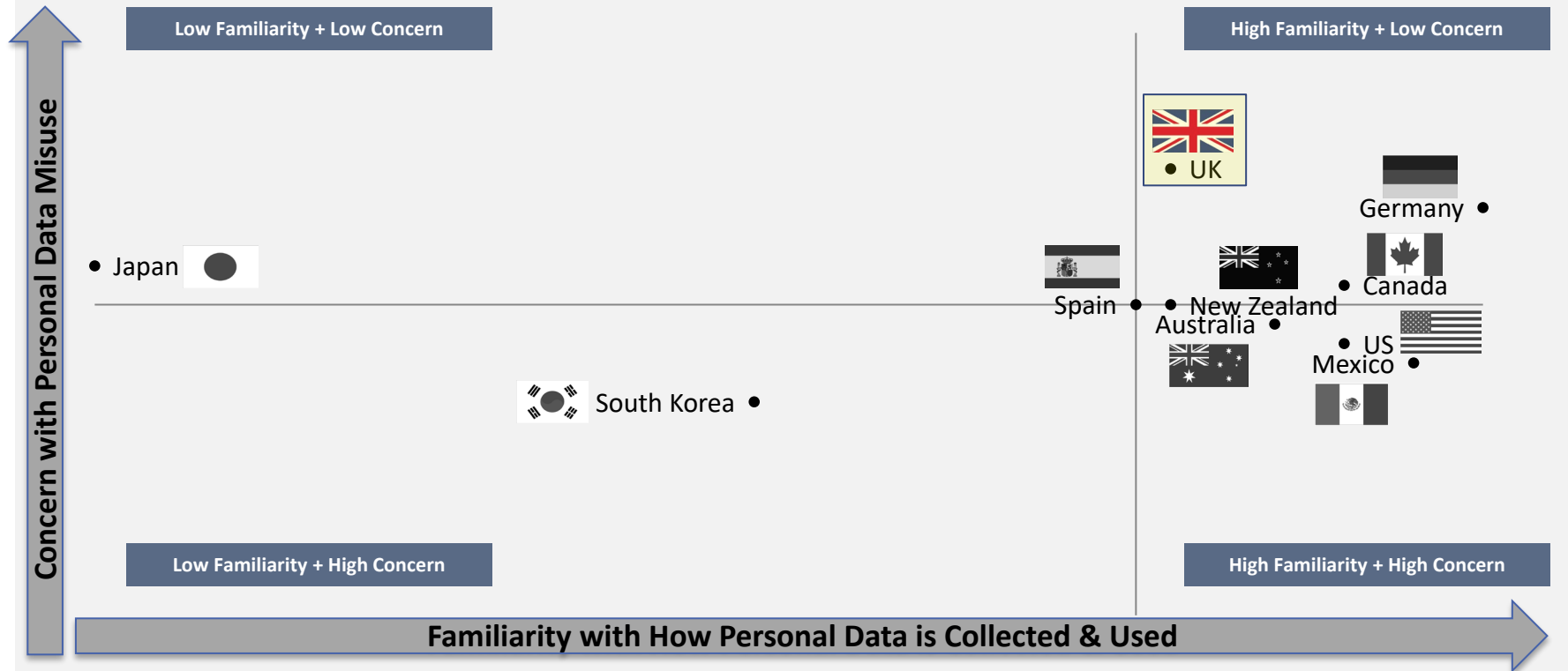
Level of Concern Regarding Misuse of Personal Data (Top 2 Box % - Very/Somewhat Concerned) - Trended to 2022





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

Relationship Between Familiarity & Concern of Misuse of Personal Data Use



**PROTECTION & USE
OF PERSONAL DATA**

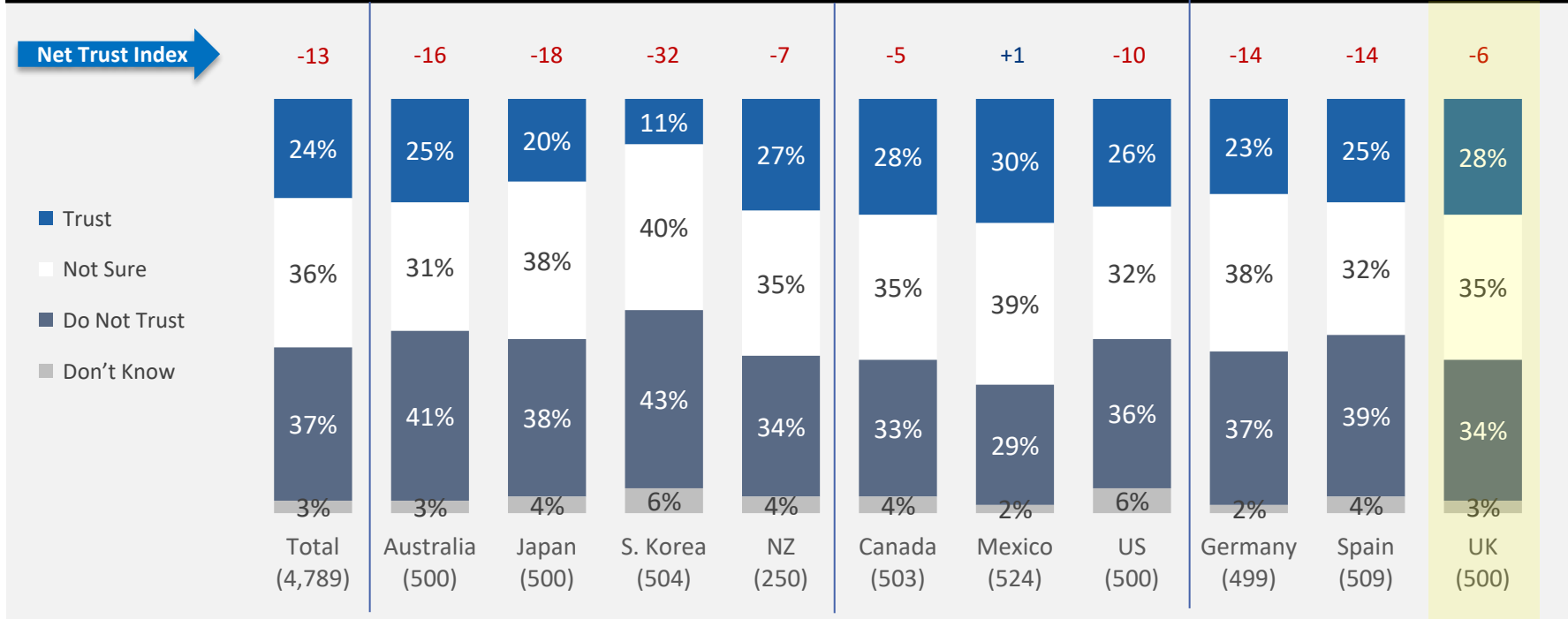




Concern exists in all countries regarding trust in organizations' abilities to protect and use consumer data responsibly. In this regard, the UK is slightly above the global average.



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










Net Trust Index = % Trust – % Do Not Trust

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



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

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

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

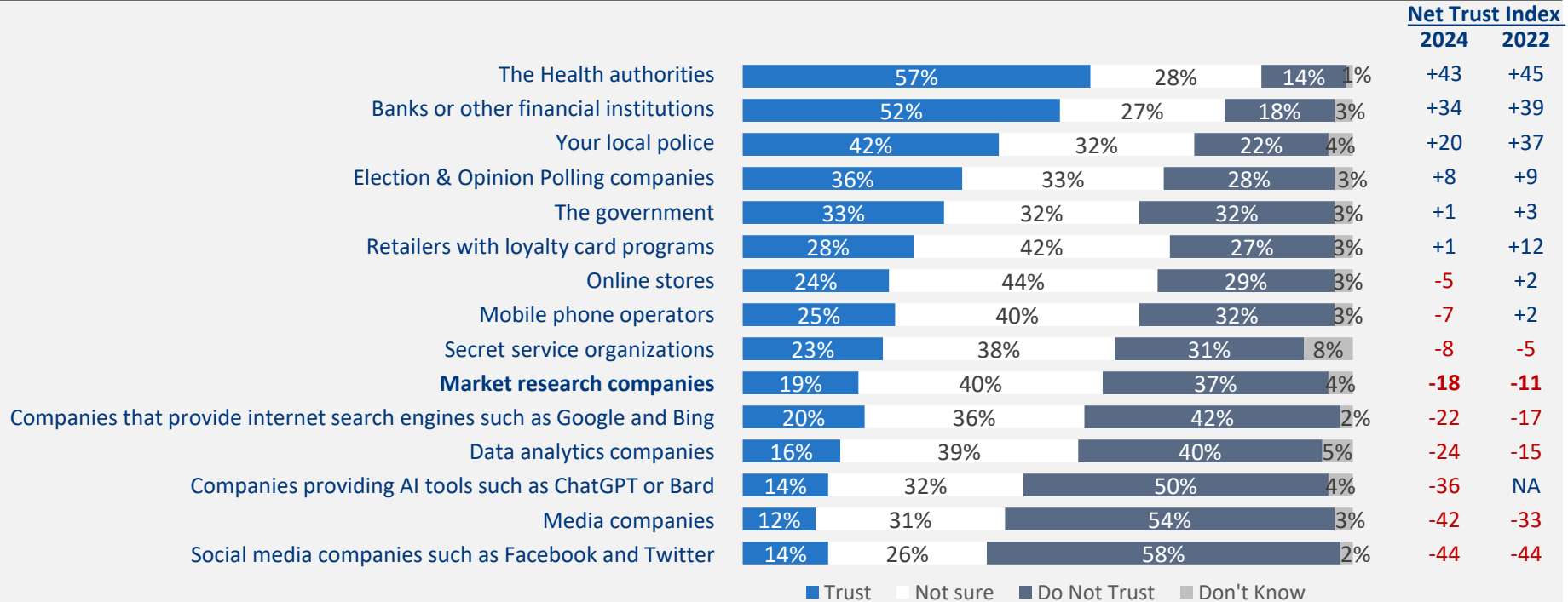


Health authorities, financial institutions and law enforcement hold the public's highest trust in safeguarding personal data in the UK. Conversely, media companies, AI providers and social media platforms face the most distrust. Market research firms also rank towards the bottom in this regard.



UK

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



Net Trust Index = % Trust – % Do Not Trust

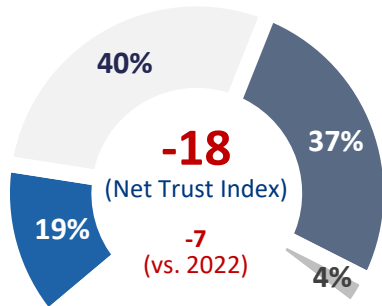


Distrust rose slightly vs. 2022, with data analytics companies continuing to hold the bottom rung in the "insights space" regarding trust in protecting and using personal data.

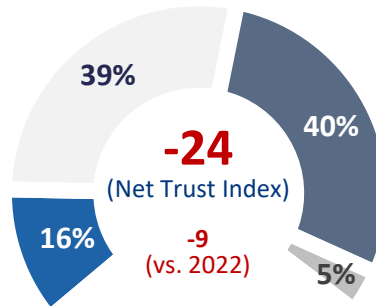


UK

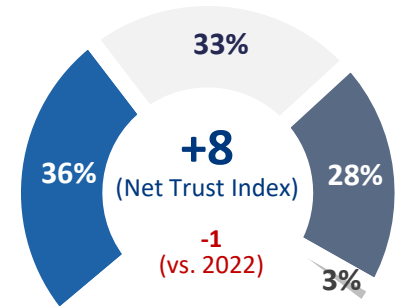
Trust in Market Research



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



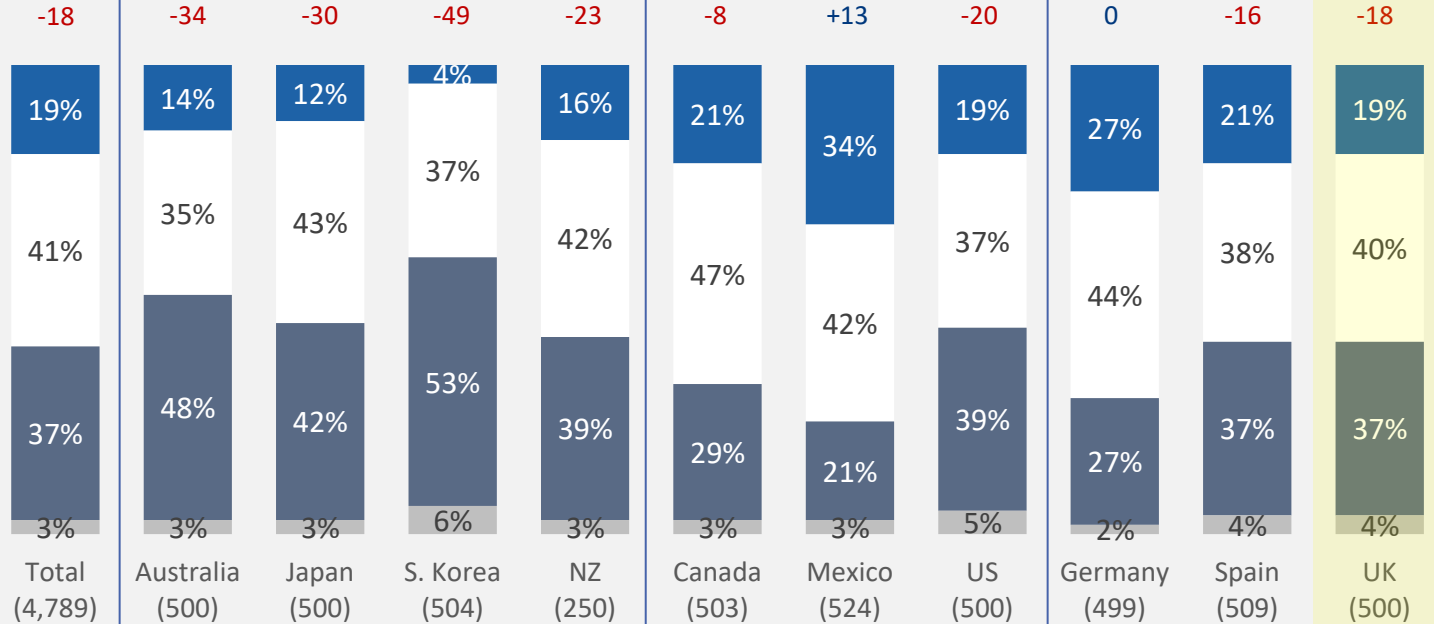
There's little trust in the ability of market research companies to protect and use personal data responsibly. In this regard, the UK aligns with the net global average.



Trust in Market Research to Protect & Appropriately Use Personal Data

Net Trust Index

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










Net Trust Index = % Trust – % Do Not Trust



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

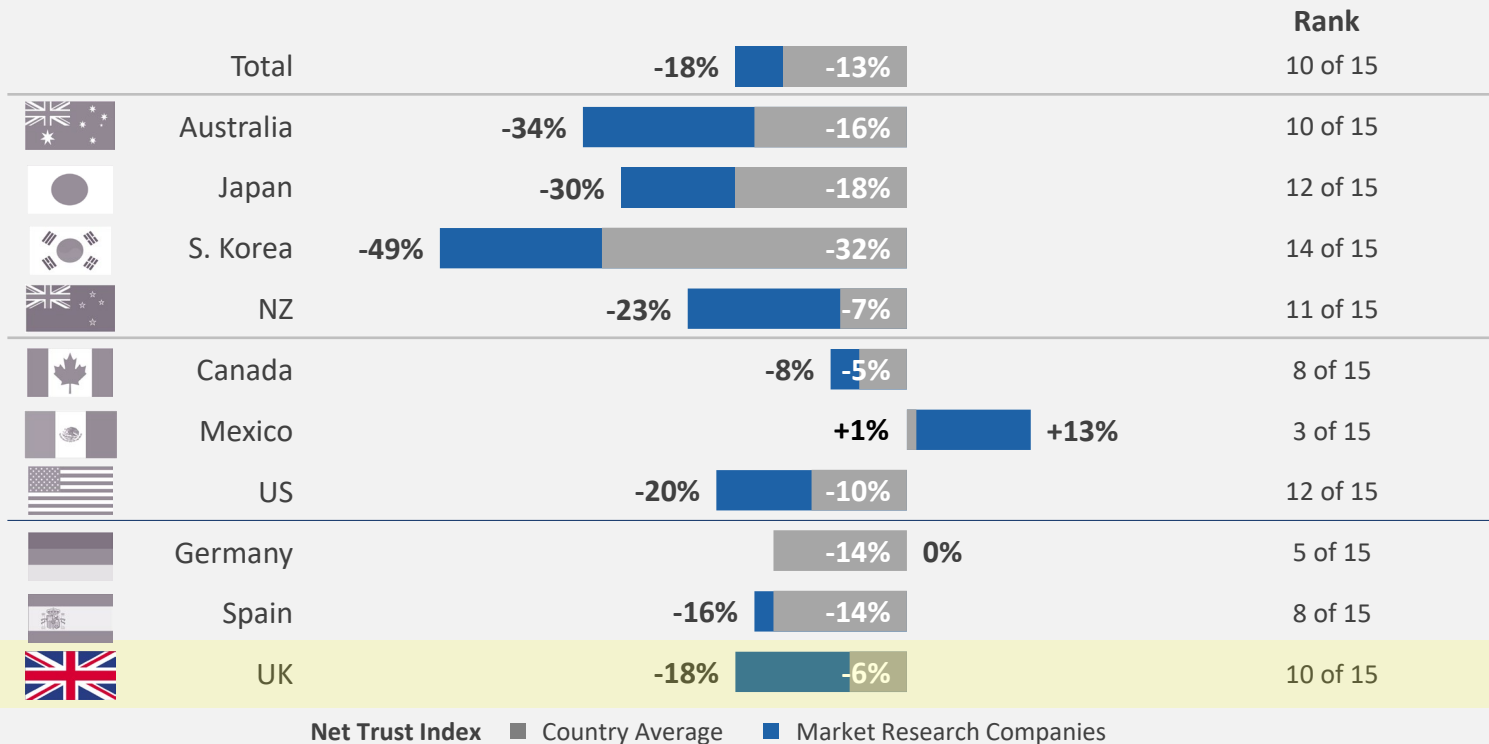
	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index	2024	-23	-34	-30	-49	-8	-20	--	-18
	vs. 2022	-5	--	-5	-12	+8	-12	-8	-7
% Trust	2024	17%	14%	12%	4%	21%	19%	27%	19%
	vs. 2022	-2%	--	+3%	-3%	+3%	-7%	-3%	-5%
% Do Not Trust	2024	39%	48%	42%	53%	29%	39%	27%	37%
	vs. 2022	+4%	+1%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

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



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

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



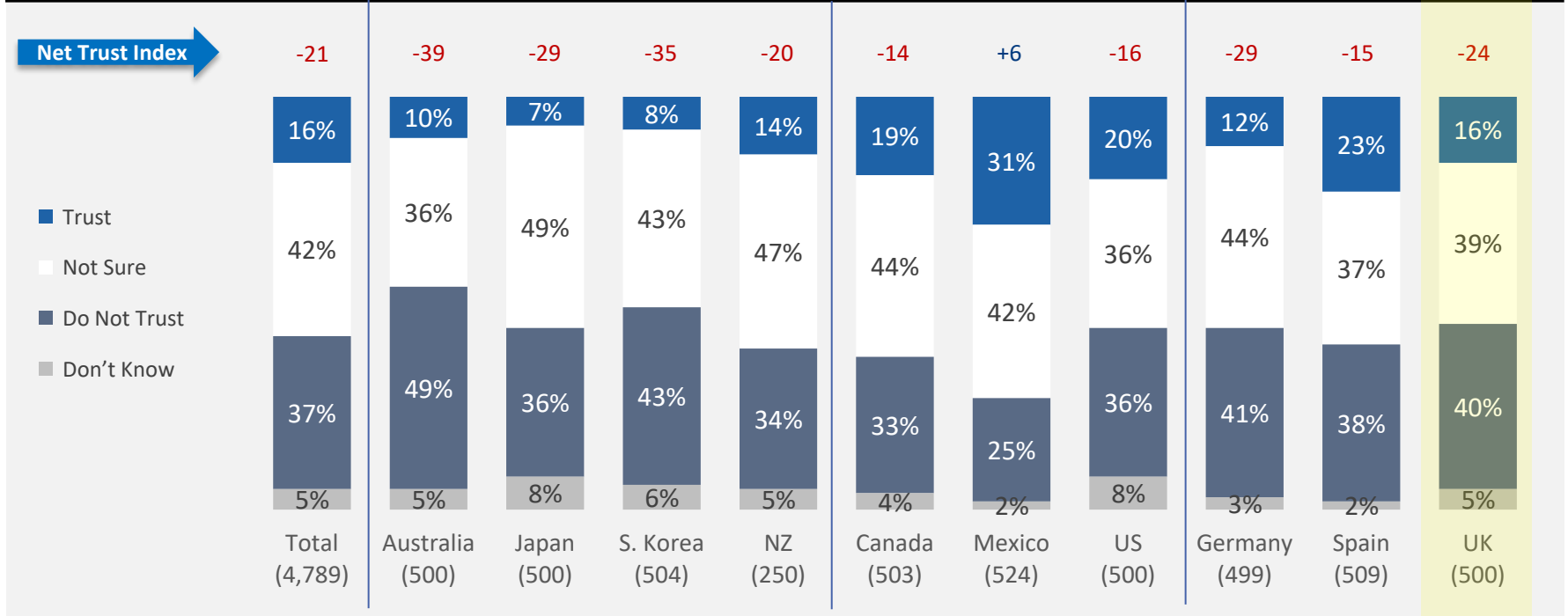
Net Trust Index = % Trust – % Do Not Trust



Globally, there's deep distrust in data analytics companies' perceived handling of personal data. In this regard, net trust in the UK is comparable to the global average.



Trust in Data Analytics to Protect & Appropriately Use Personal Data










Net Trust Index = % Trust – % Do Not Trust



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

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

	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
Net Trust Index →	2024	-27	-39	-29	-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%

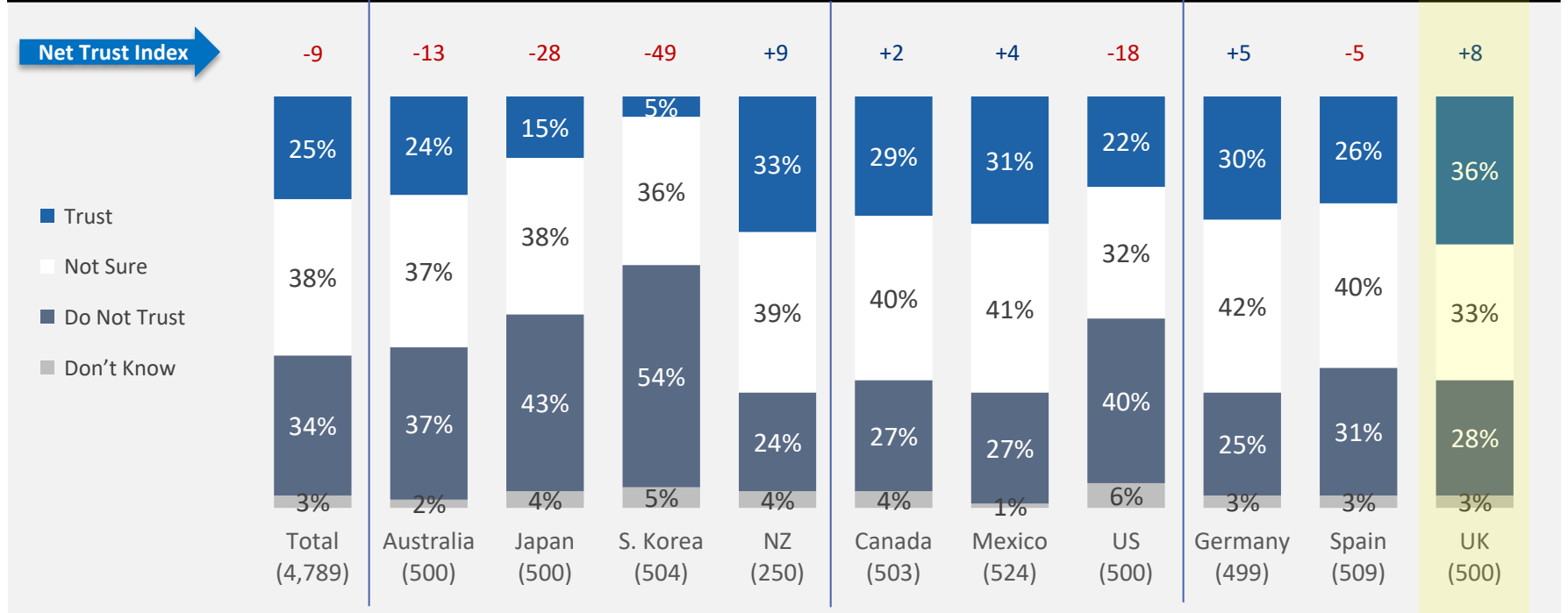
Net Trust Index = % Trust – % Do Not Trust
*Total based on comparable countries across waves.



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




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

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

	Total*	 Australia	 Japan	 S. Korea	 Canada	 US	 Germany	 UK	
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 of the entire image is a stylized fingerprint pattern in shades of gray. The magnifying glass is centered over the text, which is also in shades of gray. The text is arranged in a vertical list, with some words in a larger, bolder font than others. The magnifying glass's lens is the largest part of the image, and it is slightly tilted to the right.

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 remains divided in the UK, with equal proportions finding it both appropriate and inappropriate.



UK



Appropriate Use of Personal Data by Market Research

Bottom 2 Box: Inappropriate

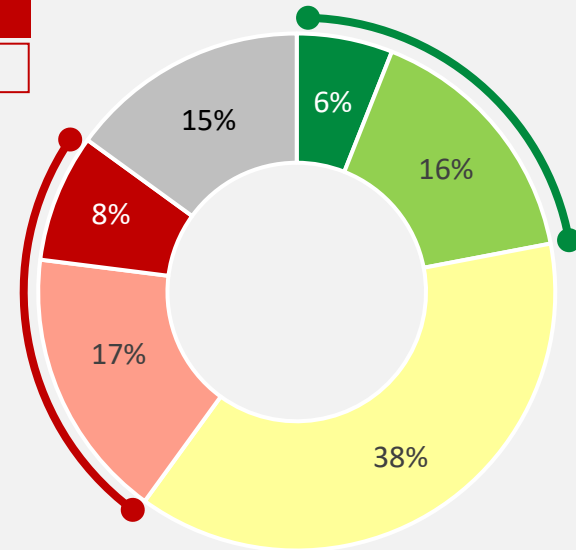
2024: 25%

2022: 25%

Top 2 Box: Appropriate

2024: 23%

2022: 24%



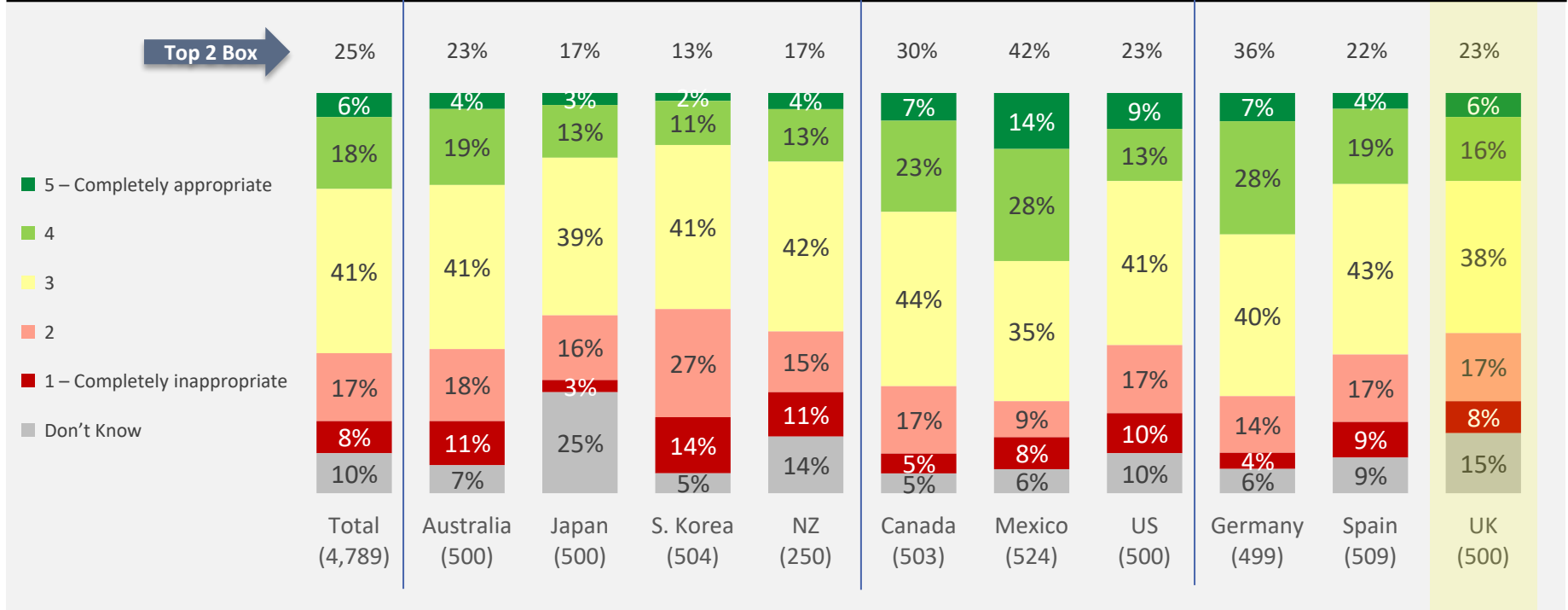
■ 5 - Completely appropriate ■ 4 ■ 3 ■ 2 ■ 1 - Completely inappropriate ■ Don't know



This mixed sentiment is evident across countries. In this regard, the UK performs similarly to the global average.



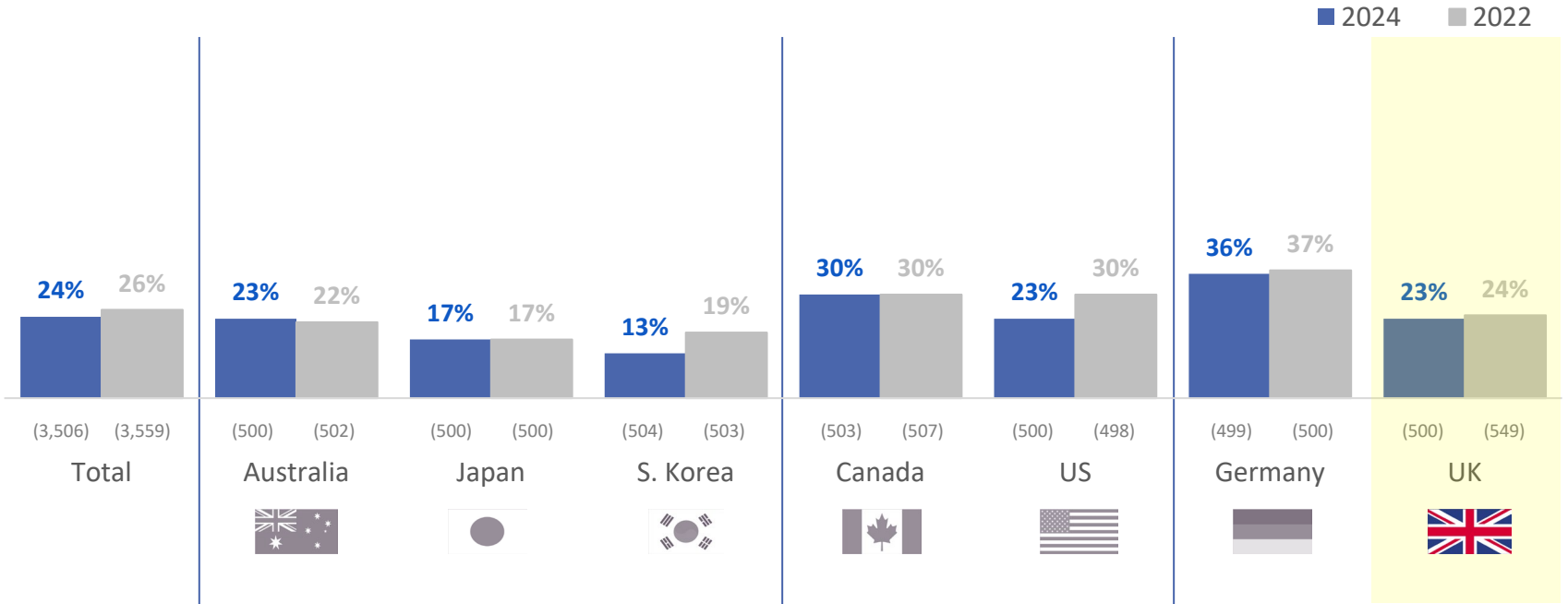
Appropriate Use of Personal Data by Market Research





In the UK, 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





Concern over market research companies securely protecting data in the UK is still a pressing issue for many.



Concern that Market Research Securely Protects Personal Data

Bottom 2 Box: Not Concerned

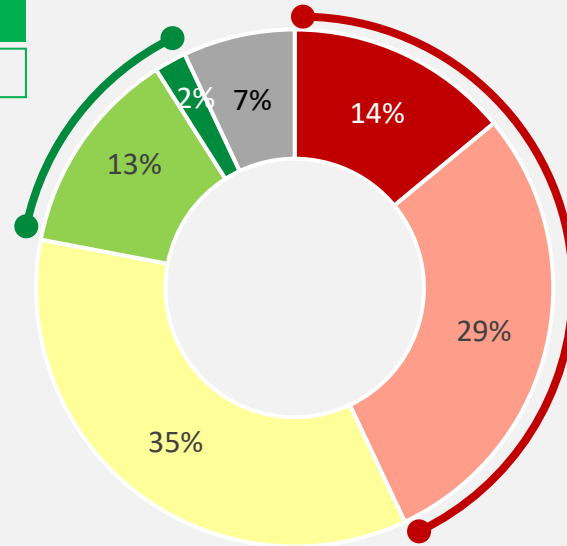
2024: 15%

2022: 16%

Top 2 Box: Concerned

2024: 43%

2022: 43%



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

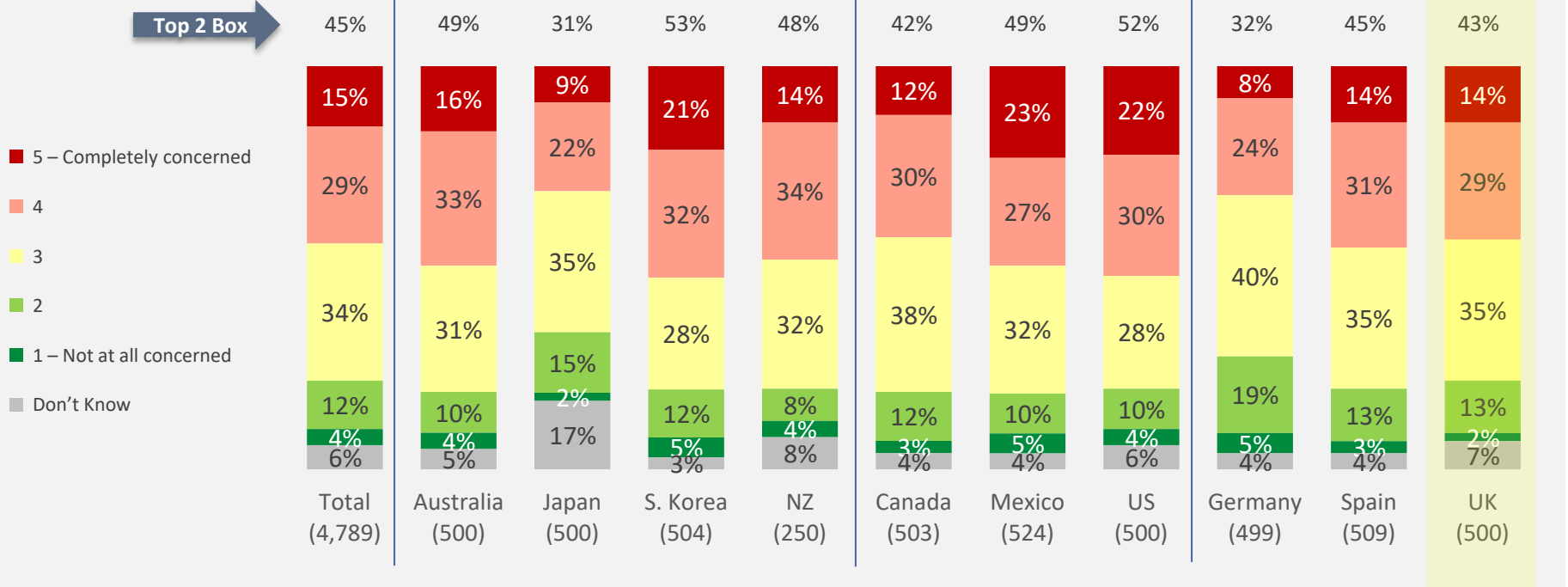


Net concern in this regard is comparable to the global average in the UK.



Concern that Market Research Securely Protects Personal Data

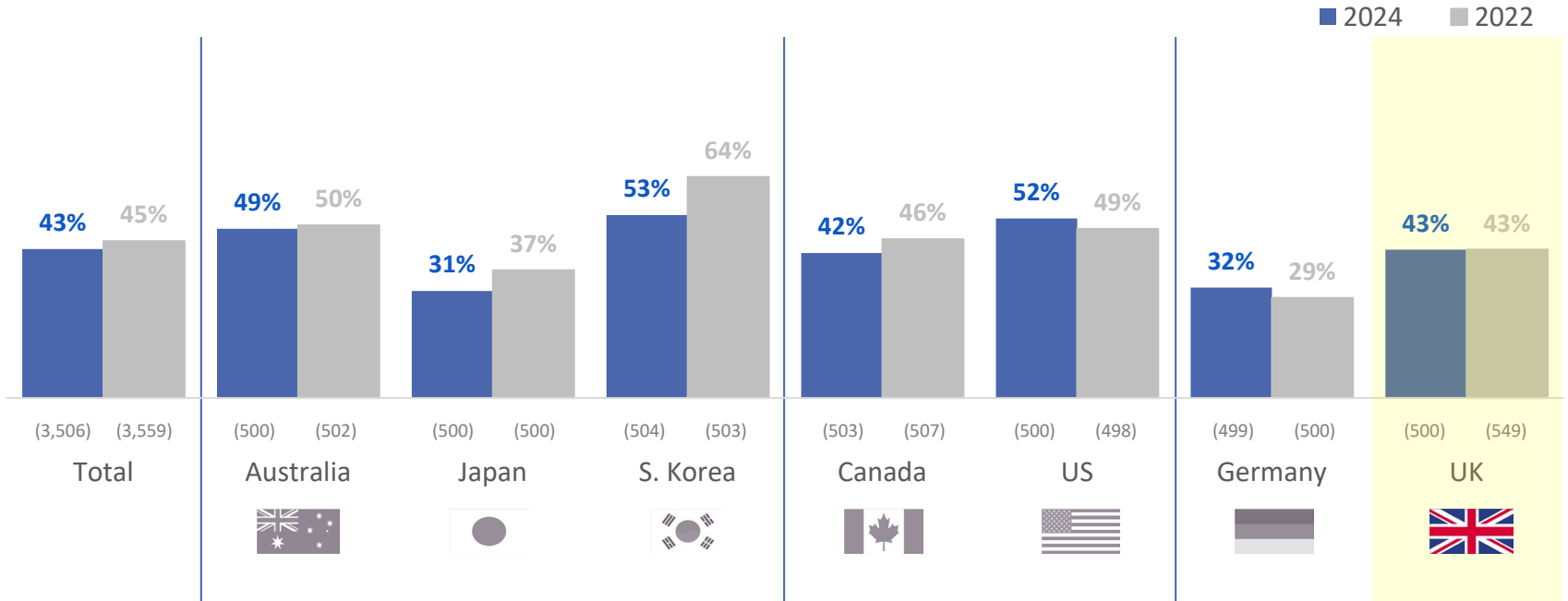
Top 2 Box





Relative to 2022, concern in the UK is stable.

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





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



UK

Degree Informed about Personal Data Collection, Storage & Use

Bottom 2 Box: Not Informed

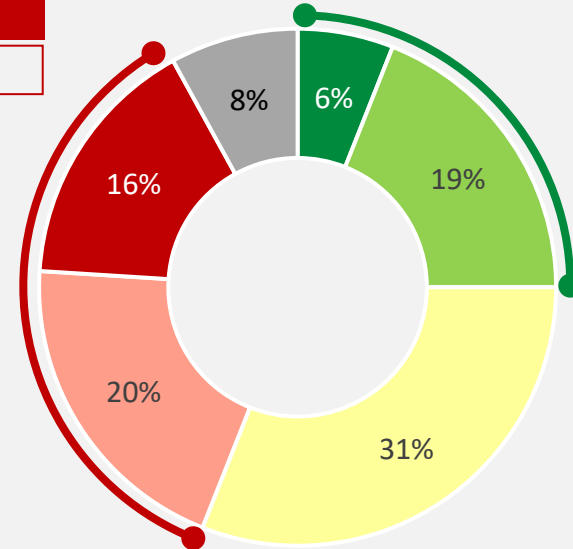
2024: 36%

2022: 38%

Top 2 Box: Informed

2024: 25%

2022: 25%



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

Do you know where your data is?

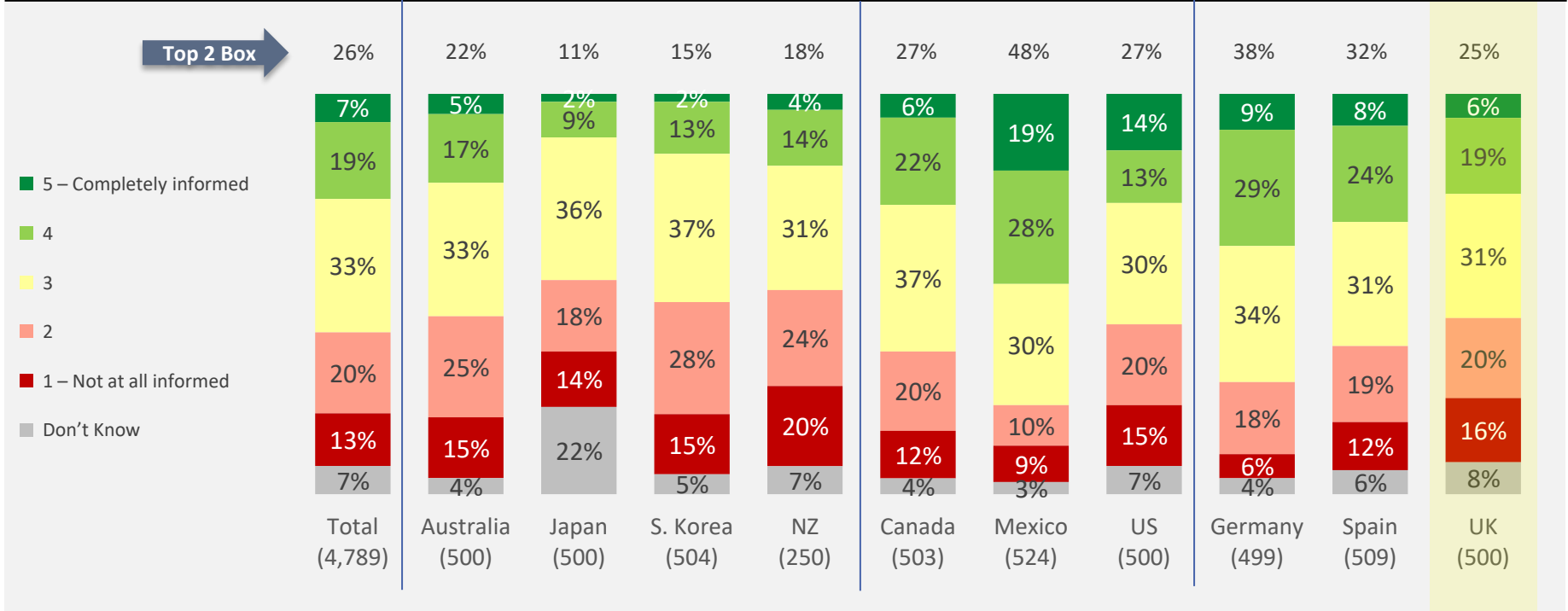




The sentiment of not being informed in the UK aligns with the global average.



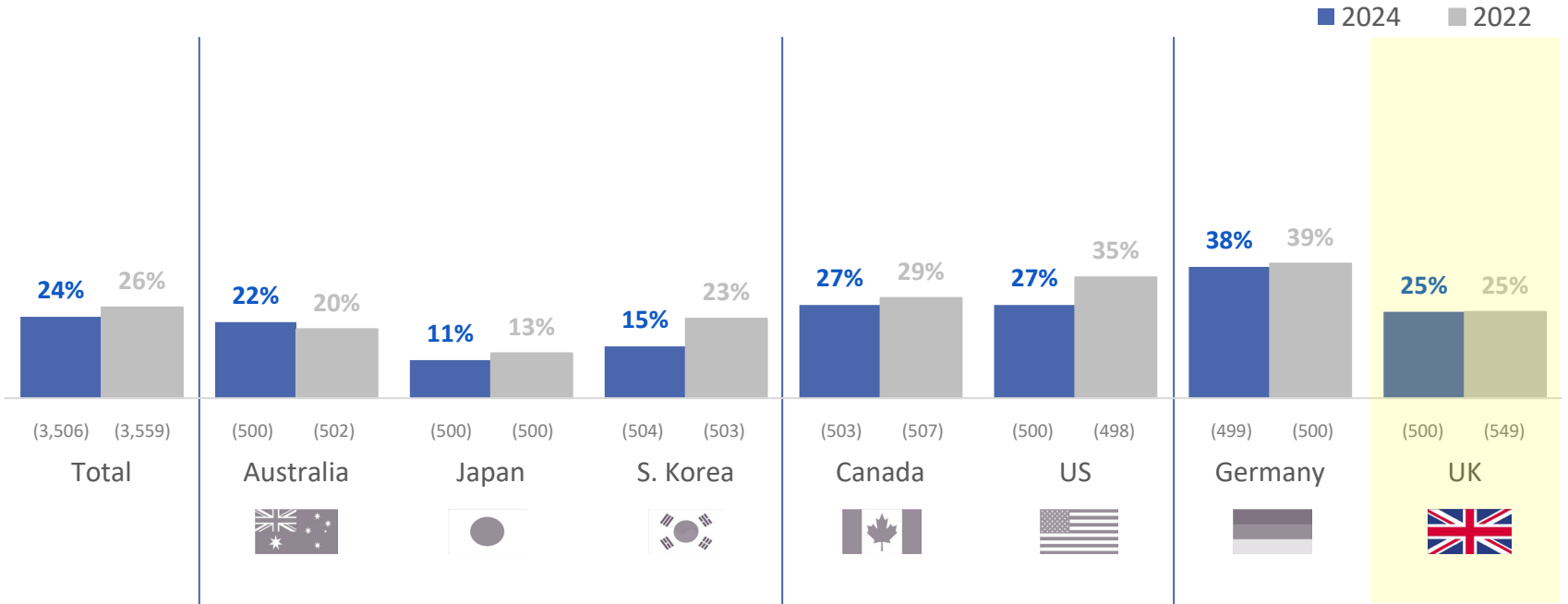
Degree Informed about Personal Data Collection, Storage & Use



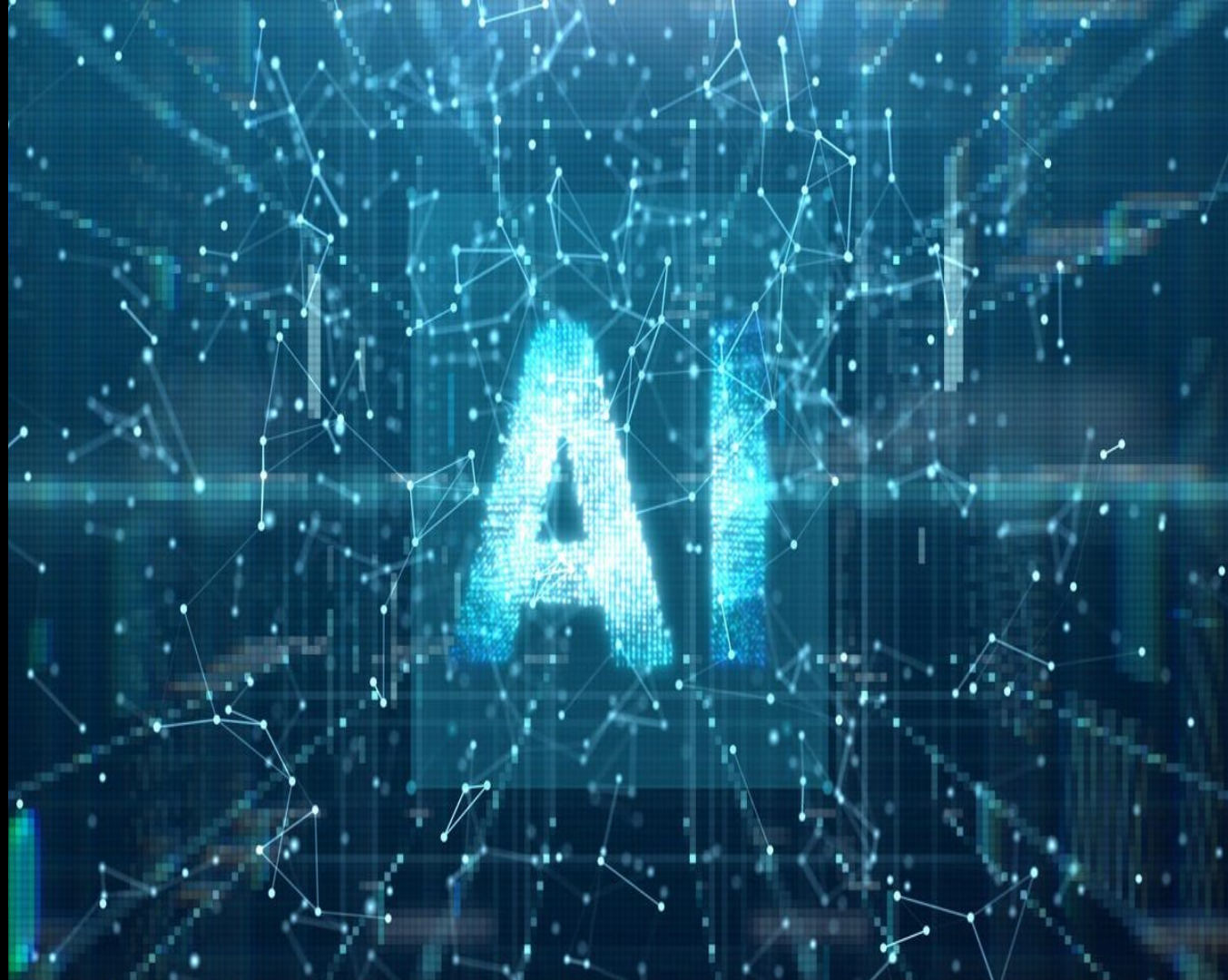


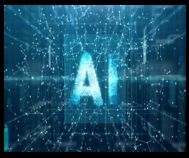
Sentiment is largely similar relative to 2022.

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



**HOW AI
IMPACTS
THE LEVEL OF TRUST**





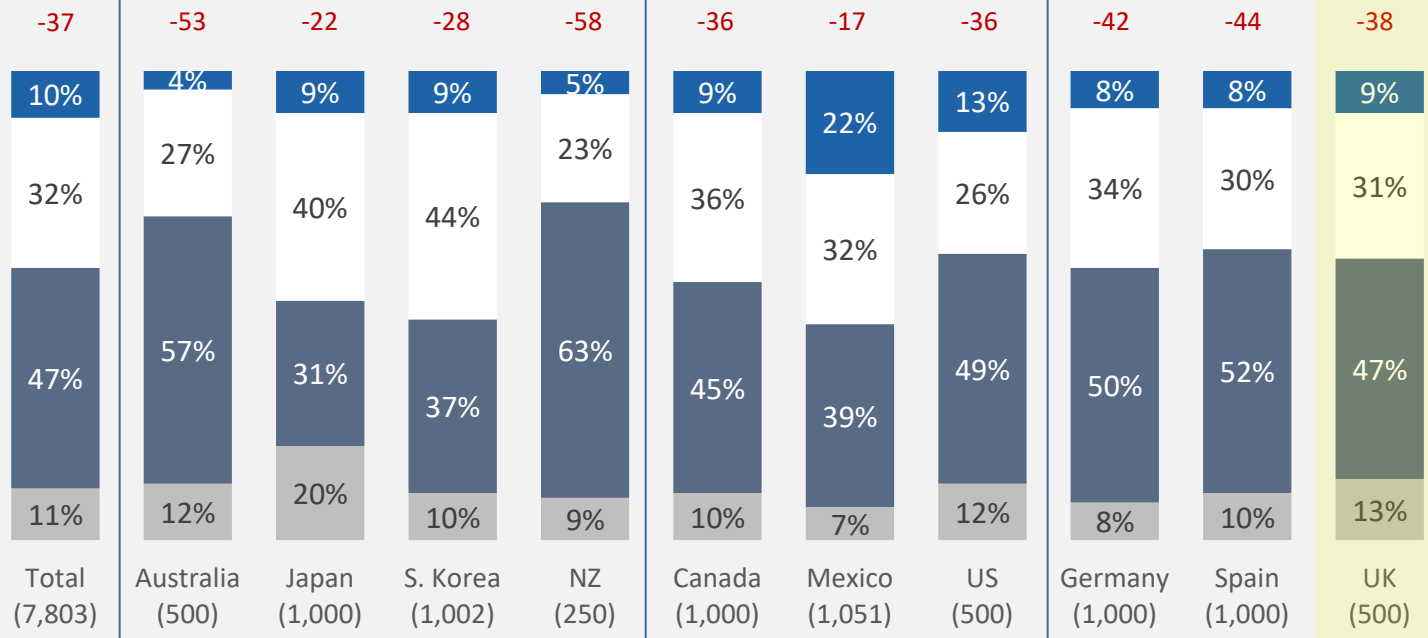
Incorporating AI into market research practices negatively impacts trust in market research companies.



Average Impact on Trust of Market Research Companies Using AI†

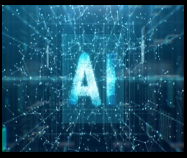
Net Trust Index

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



Net Trust Index = % Increase Trust – % Decrease Trust

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



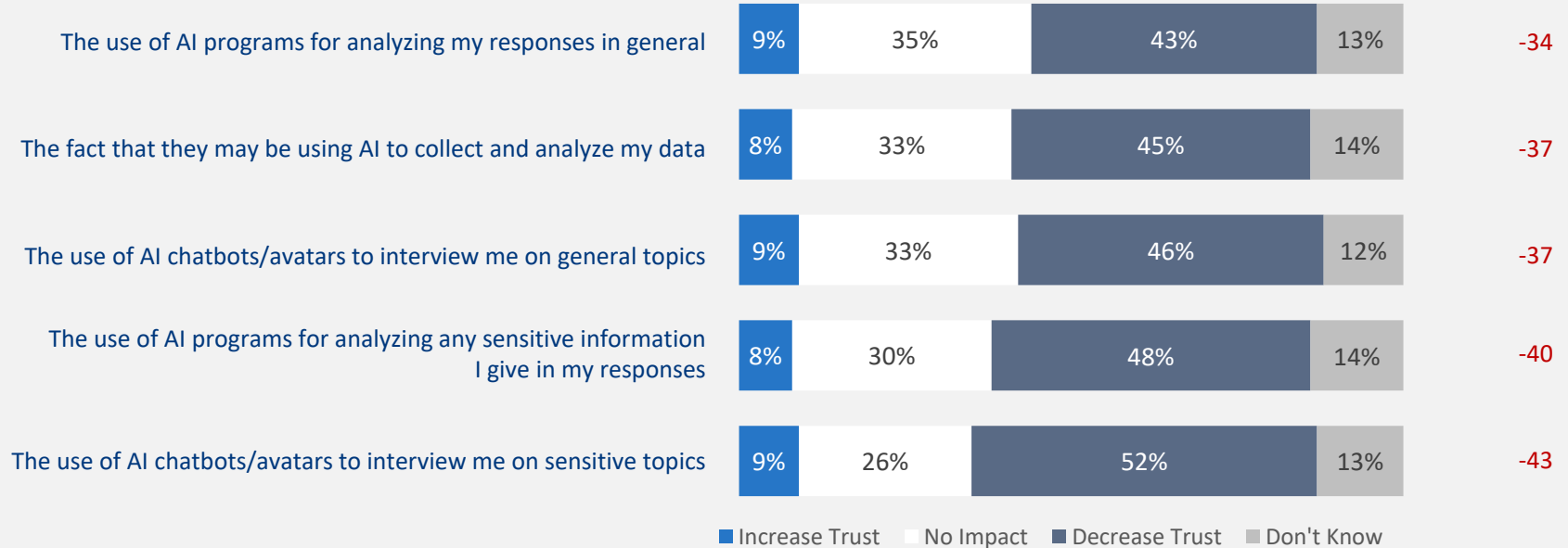
Net trust is negative across all aspects of AI use by market research companies.



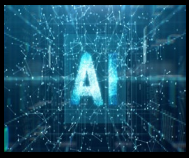
UK

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

Net Trust Index
2024



Net Trust Index = % Increase Trust – % Decrease Trust



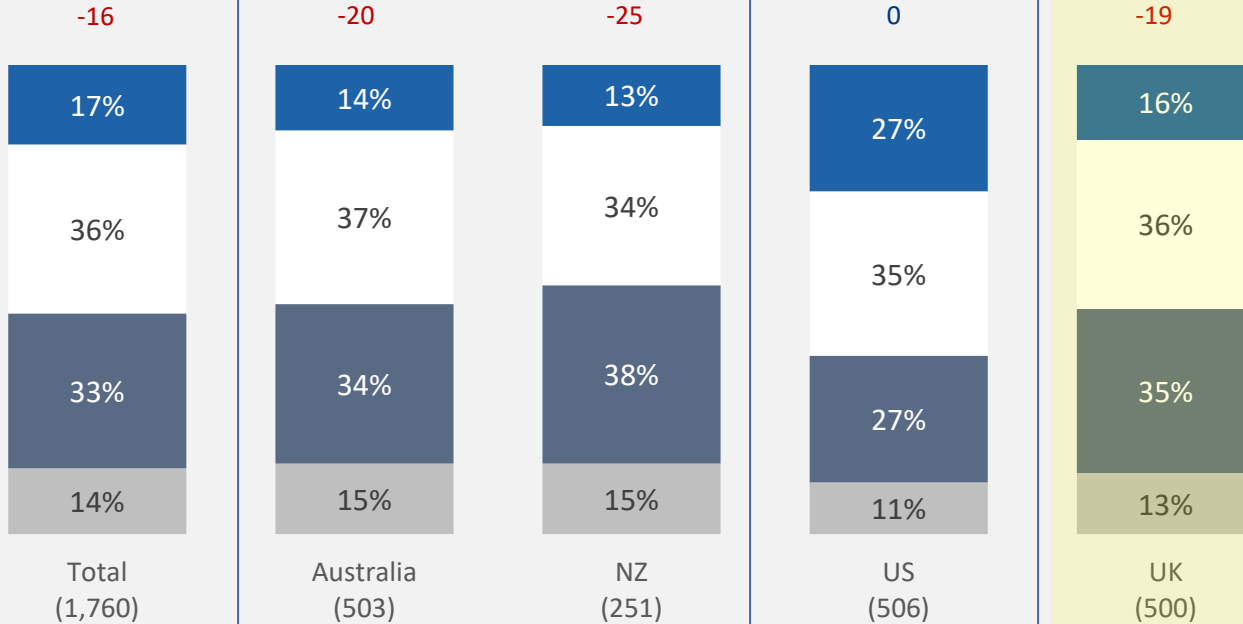
People are, on balance, negative about how the use of AI by market research companies impacts trustworthiness. In this regard, net trust in the UK is similar to the global average.



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

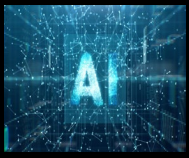
Net Trust Index

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



Net Trust Index = % Increase Trust – % Decrease Trust

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

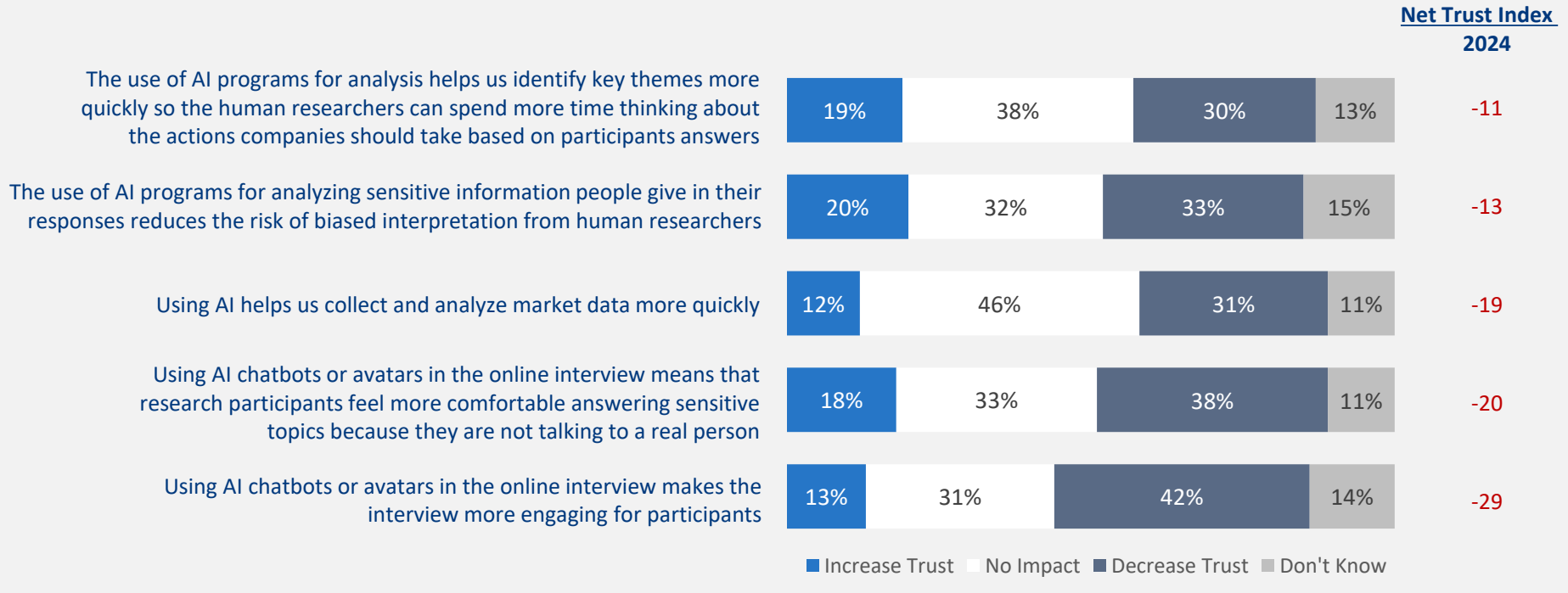


This perceived distrust extends to all claimed benefits.



UK

Levels of Trust in Benefits of Using AI Claimed by Companies



Net Trust Index = % Increase Trust – % Decrease Trust

**TREND DATA
2024 VS. 2022**



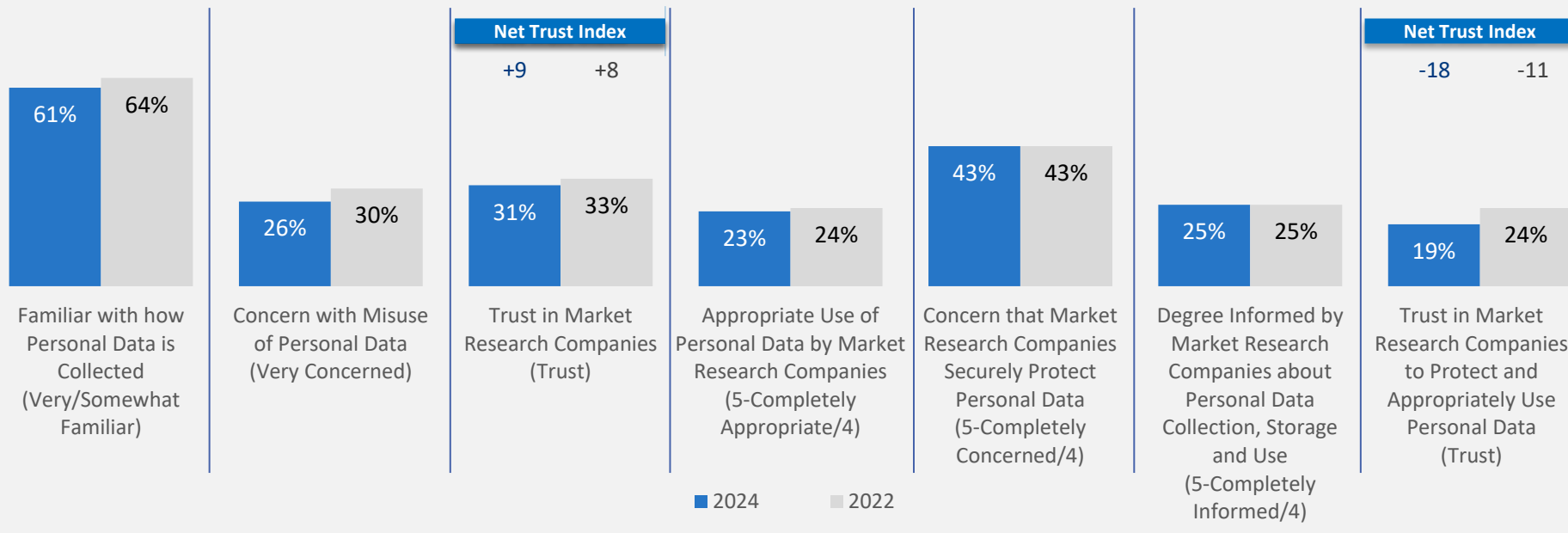


While net trust in market research companies overall is stable vs. 2022, trust in relation to personal data use is lower in the UK.



UK

2024 vs. 2022 Comparison



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TRUST AND OTHER GLOBAL
INDUSTRY INITIATIVES

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