Global Trust Survey 2024

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

Focus on the USA

April 2024

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Read Me: I'm Important

"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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Trust: Together, We Can Earn It

Here in the U.S., we were pleased to see rays of optimism rippling through the findings of the 2024 Global Trust Survey. These are areas we can explore, learn from, and build upon. Let's dive in.

First, it was encouraging to see that the U.S. bucked the global trend of growing distrust in organizations. Americans were the only group in the international survey to increase their trust level in organizations of all sorts – albeit a modest 5% up to 20%. This carried through to our industry. Those in the U.S. who believe market research benefits them grew by 6% during the past two years and now sits at 56%. We believe this area – proving to consumers the value of what we do to help them in their everyday lives – is deserving of more attention.

Personal, Meaningful Relationships with Consumers
Insights, done properly and inclusively, provide citizens with a voice. Those of us in the business understand this, but the general population is largely unaware. Recently though, as brands invest in making more meaningful, personal connections with consumers, we're seeing greater understanding and appreciation that this is

indeed a two-way relationship. We're seeing this build at the grassroots level in highly visible ways via popular influencers who work closely with brands on Instagram and TikTok. They illuminate how consumers can sway brands in their messaging, advocacy, UX, and improving access to the process.

AI: A Double-edged Sword
Integrating AI into the insights process may be a time saver, but it may also be a trust deflator. Nearly half of respondents said that the use of AI by market research companies decreases their trust in that company, specifically noting the use of AI chatbots and avatars for online interviews. Only 13% said it increases their trust. The fact that companies providing AI tools have among the lowest trust levels (25%, compared to banks, which have the highest at 60%) should be noted as a cautionary data point. It is imperative that organizations emphasize the human touch in research and create and communicate clear policies on the use of AI in their work. IA is working on an AI policy that will focus on, among other things, duty of care, transparency, and quality. Such guidelines – at an industry and company level – will bring clarity, understanding, and trust.

Data Privacy

There continues to be widespread distrust in how industries, including market research, handle personal data. Close to 30% of U.S.-based survey respondents don't know how their data is collected and used in a market research setting. This underscores the need for transparency and effective communication and notification. On the regulatory front, IA continues to urge Congress to adopt a national data privacy law to bring consistency and eliminate the confusing patchwork of state laws. We're also stepping up our efforts to promote the IA Code of Standards, which is featured as a learning module on our new education platform.

Participant Satisfaction

While the report indicates that satisfaction in the survey process is steady, we are not content. Satisfaction levels have been too low for far too long and we are determined to improve them. Criticism of long surveys continues. Here, AI enhancements can help.

There are numerous other contributing factors and we are working to address them. At the Insights Association's Annual Conference in April, we asked attendees to help us co-develop a Participant Bill of Rights and to work on policies to guide the proper and ethical use of AI. The engagement was enthusiastic and rigorous; the results of the brainstorms incredibly productive and valuable. In the coming months, IA's Standards Committee will move these ideas forward and develop supplements to our Code. Then it will be time to activate these best practices across the industry. I hope we can count on you to help with implementation. Only with your adoption can we move the needle on trust – in this report and across society.

- **Melanie Courtright**, CEO, Insights Association

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:

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

- o 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

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

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

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

Background & Sample (Cont'd)

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

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

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

KEY TAKEAWAYS

Key Takeaways

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

✓ The value market research brings to businesses is recognized, but there's opportunity to boost perceptions as it relates to individuals.

✓ The survey experience can still be improved for Americans, particularly by decreasing the length of surveys.

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

✓ While Americans are highly skeptical of AI use in market research, they're divided in terms of trusting companies touting its benefits.

   o The distrust stems from the use of AI chatbots and avatars for online interviews.

Key Changes 2024 vs. 2022

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

- o Trust in **market research companies** remains positive and stable.

- o Though negative perceptions of **data analytics companies** persist worldwide, net trust remains positive in the US.

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

✓ Across all countries, consumers perceived a greater personal benefit from market research.

- o In the US, positive perceived benefits to consumers is largely consistent.

✓ There's universal erosion of trust in how organizations handle personal data.

- o This is evident in across the "insights space" (market research, data analytics and election & polling companies), with trust in market research companies experiencing the greatest decline.

SNAPSHOT VIEW OF: TRUST IN & IMPRESSIONS OF MARKET RESEARCH

Public trust in market research companies remains a net positive in the US, but data privacy practices continue to be a growing concern.
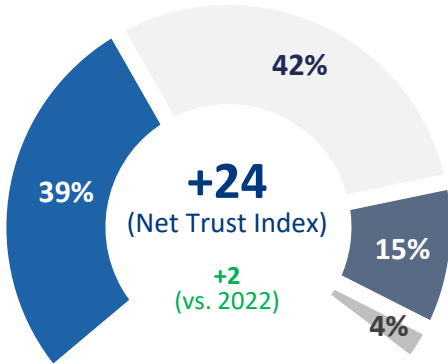
Overall Trust of Market Research Companies

42%

39%

+24
(Net Trust Index)

+2
(vs. 2022)

15%

4%

Trust of Market Research Companies to Protect & Appropriately Use Personal Data

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

37%

39%

-20
(Net Trust Index)

-12
(vs. 2022)

19%

5%
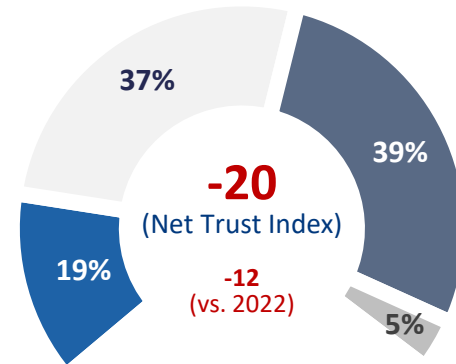
Net Trust Index = % Trust – % Do Not Trust

Overall Trust Net Trust Index (NTI): Across the 15 industries/organizations analyzed, the average NTI was +20 (Market Research companies ranked 8th of 15)
Personal Data Trust Net Trust Index (NTI): Across the 15 industries/organizations analyzed, the average NTI was -10 (Market Research companies ranked 12th of 15)

Base: Version 1 Respondents (500)
Base: Version 2 Respondents (506)

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

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Overall Trust of Market Research Companies – Net Trust Index

Retailers with loyalty card programs (Ranked 1st of 15) — +49

Market Research companies (Ranked 8th of 15) — +24

Average: +20

-11 — Social media companies such as Facebook and Twitter (Ranked 15th of 15)
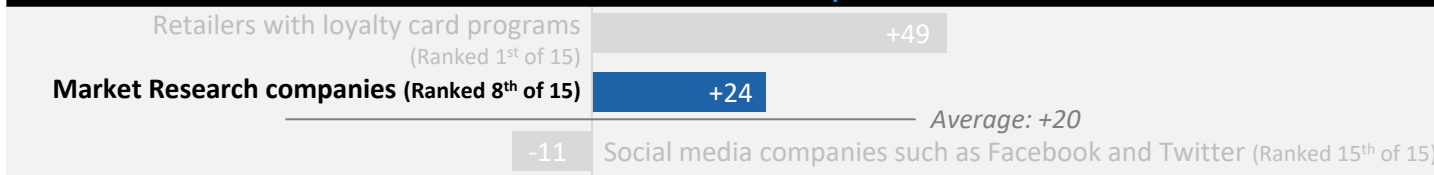
Trust of Market Research Companies Use of Personal Data – Net Trust Index

Banks or other financial institutions (Ranked 1st of 15) — +30

Average: -10

-20 — Market Research companies (Ranked 12th of 15)

-41 — Companies providing AI tools such as ChatGPT or Bard (Ranked 15th of 15)
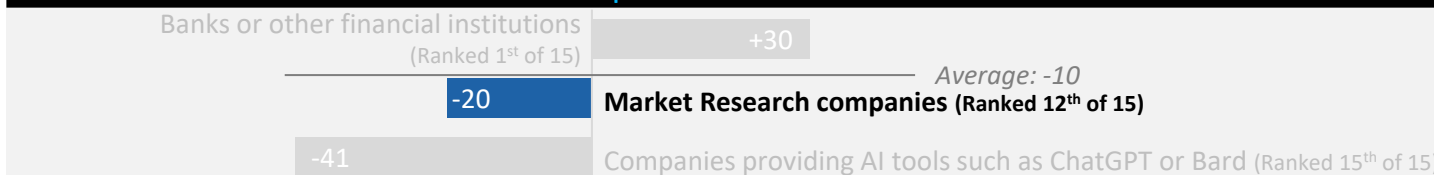
Net Trust Index = % Trust – % Do Not Trust

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

23%

(-7% vs. 2022)

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

52%

(+3% vs. 2022)

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

27%

(-8% vs. 2022)

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

56%

(+6% vs. 2022)

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

Appropriate = 5-Completely Appropriate/4
Concerned = 5-Completely Concerned/4
Informed = 5-Completely Informed/4
Benefits = 5-Benefits Completely/4

Base: Version 1 Respondents (500)
Base: Version 2 Respondents (506)

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. The level of trust in the US is above the global average.
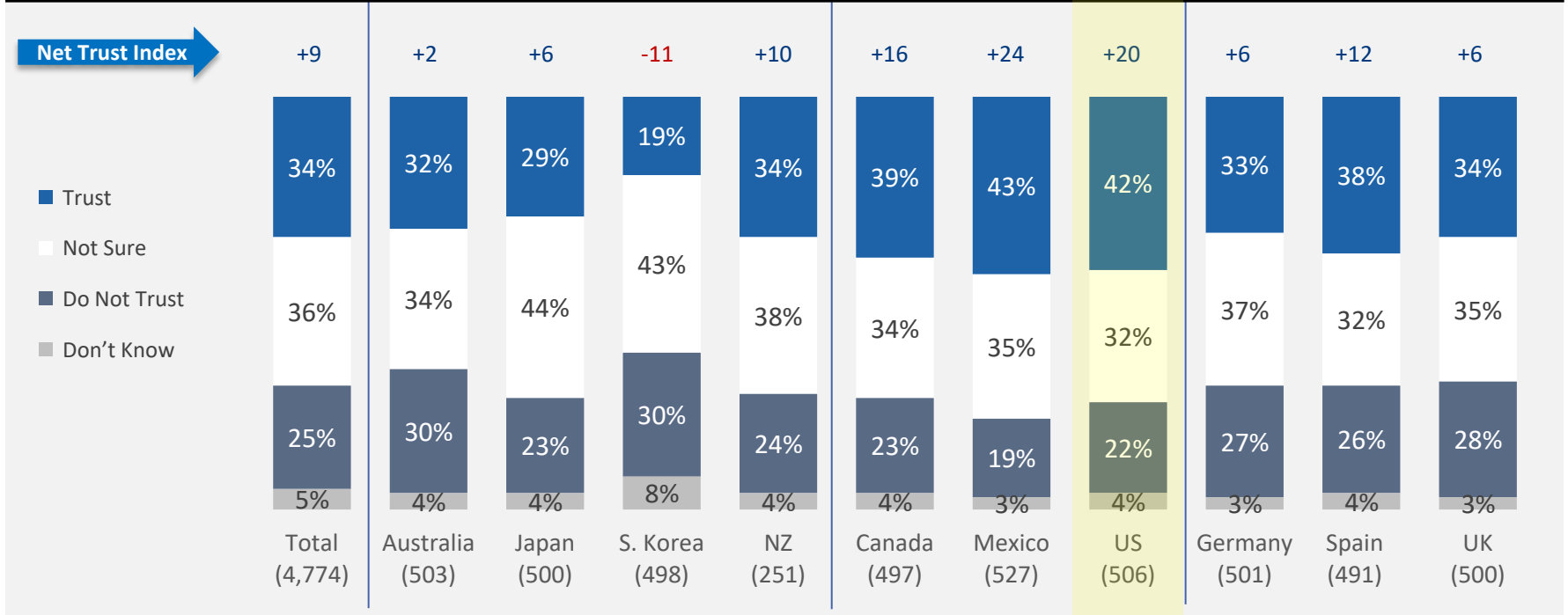
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Average Level of Trust Across Organizations/Professionals†

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

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

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

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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

Retail establishments, along with online stores and financial institutions earn the highest levels of trust in the US. Market research companies rank in the middle, while media, social media and companies providing AI tools incur the most doubt.

Level of Trust by Organizations/Professionals

	Trust	Not sure	Do Not Trust	Don't Know	Net Trust Index 2024	Net Trust Index 2022
Retailers with loyalty card programs	58%	30%	9%	3%	+49	+47
Online stores	57%	30%	10%	3%	+47	+38
Banks or other financial institutions	60%	24%	13%	3%	+47	+41
Your local police	59%	19%	20%	2%	+39	+32
The Health authorities	53%	27%	17%	3%	+36	+31
Companies that provide internet search engines such as Google and Bing	49%	31%	16%	4%	+33	+25
Mobile phone operators	45%	37%	14%	4%	+31	+23
Market research companies	39%	42%	15%	4%	**+24**	**+22**
Data analytics companies	32%	44%	18%	6%	+14	+17
The government	36%	26%	34%	4%	+2	-15
Secret service organizations	31%	35%	29%	5%	+2	+4
Election & Opinion Polling companies	33%	31%	33%	3%	0	-5
Media companies	28%	37%	33%	2%	-5	-15
Companies providing AI tools such as ChatGPT or Bard	25%	35%	35%	5%	-10	NA
Social media companies such as Facebook and Twitter	28%	30%	39%	3%	-11	-18

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

Net Trust Index = % Trust − % Do Not Trust

Market research companies continue to command the most trust across the "insights space" in the US. That said, trust in election and opinion polling companies slightly increased vs. 2022.
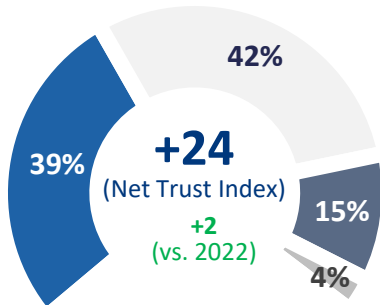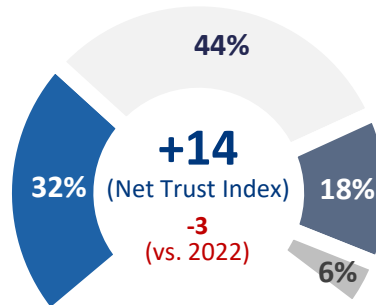
TRUST

US

Trust in Market Research

42%

39%

+24
(Net Trust Index)
+2
(vs. 2022)

15%

4%

Trust in Data Analytics

44%

32%

+14
(Net Trust Index)
-3
(vs. 2022)

18%

6%

Trust in Election & Opinion Polling

31%

33%

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

33%

3%
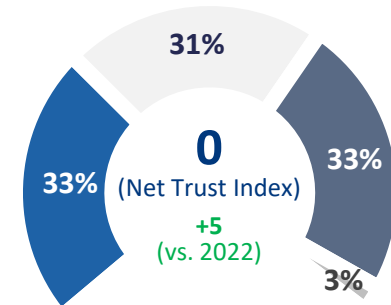
- Trust
- Not Sure
- Do Not Trust
- Don't know

Net Trust Index = % Trust – % Do Not Trust

Trust in market research companies varies greatly by country but leans positive overall. In this regard, the US performs well above the global average.

Trust in Market Research

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

- Trust
- Not Sure
- Do Not Trust
- Don't Know
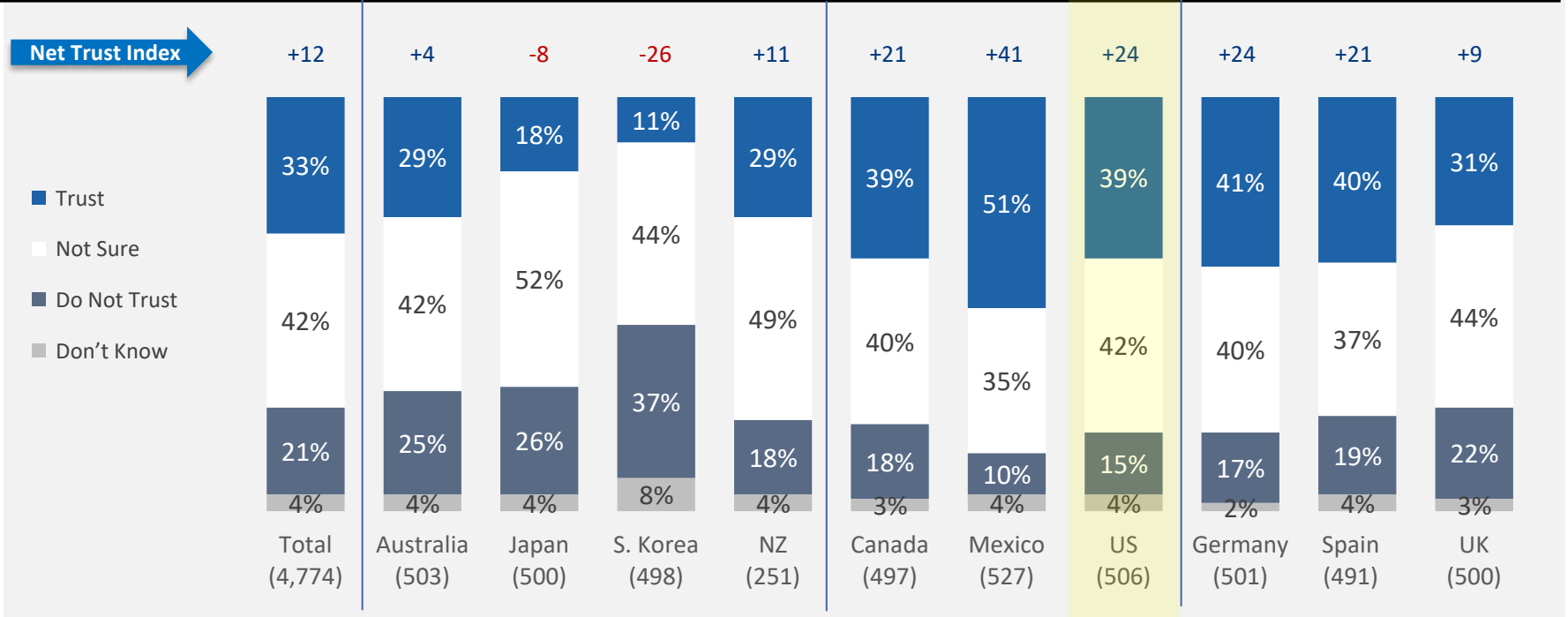
Net Trust Index = % Trust – % Do Not Trust

Trust in market research is fairly stable vs. 2022.

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 in the US typically ranks in the middle of the pack, aligning with the global average.

Trust in Market Research (vs. Country Average)

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

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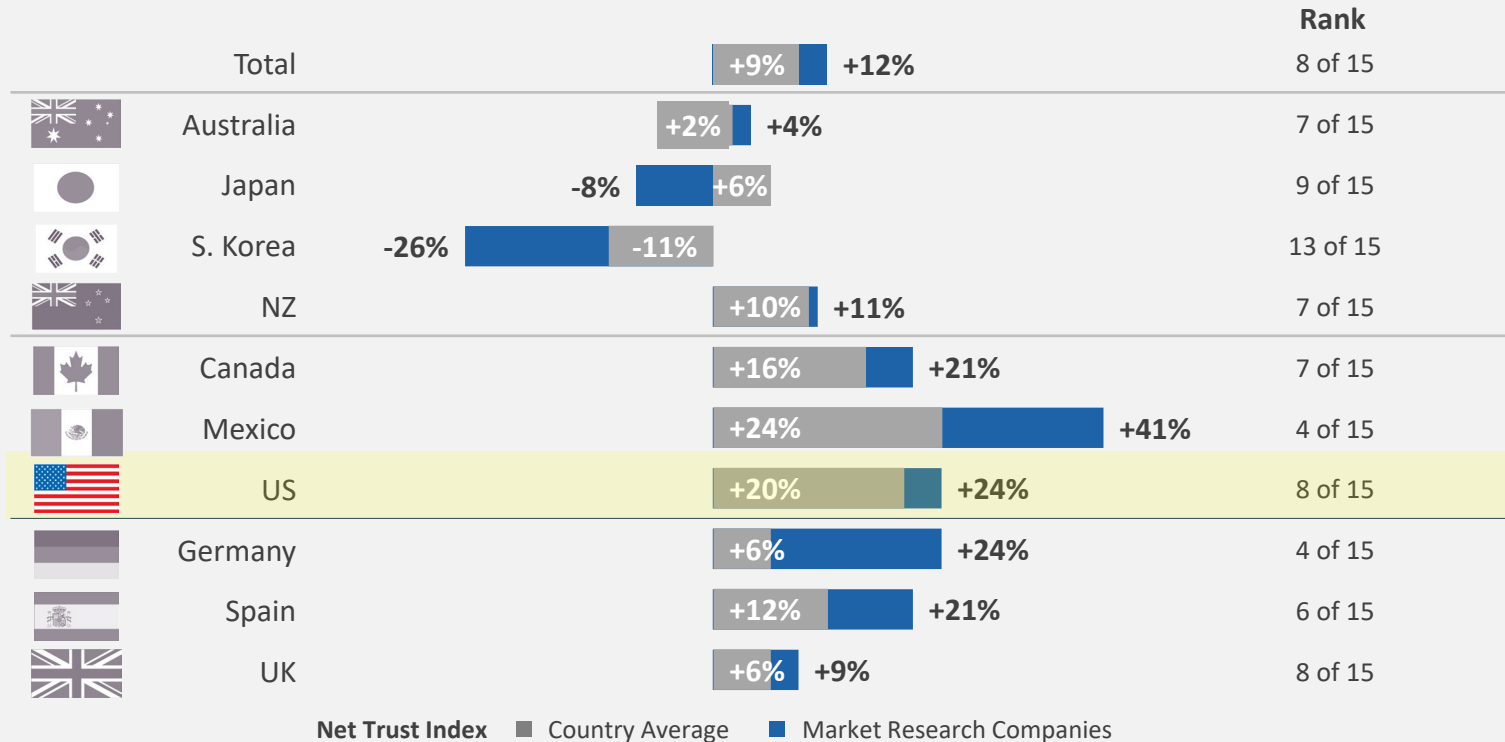
Net Trust Index = % Trust – % Do Not Trust

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

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Trust in Data Analytics

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

Net Trust Index = % Trust – % Do Not Trust

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25
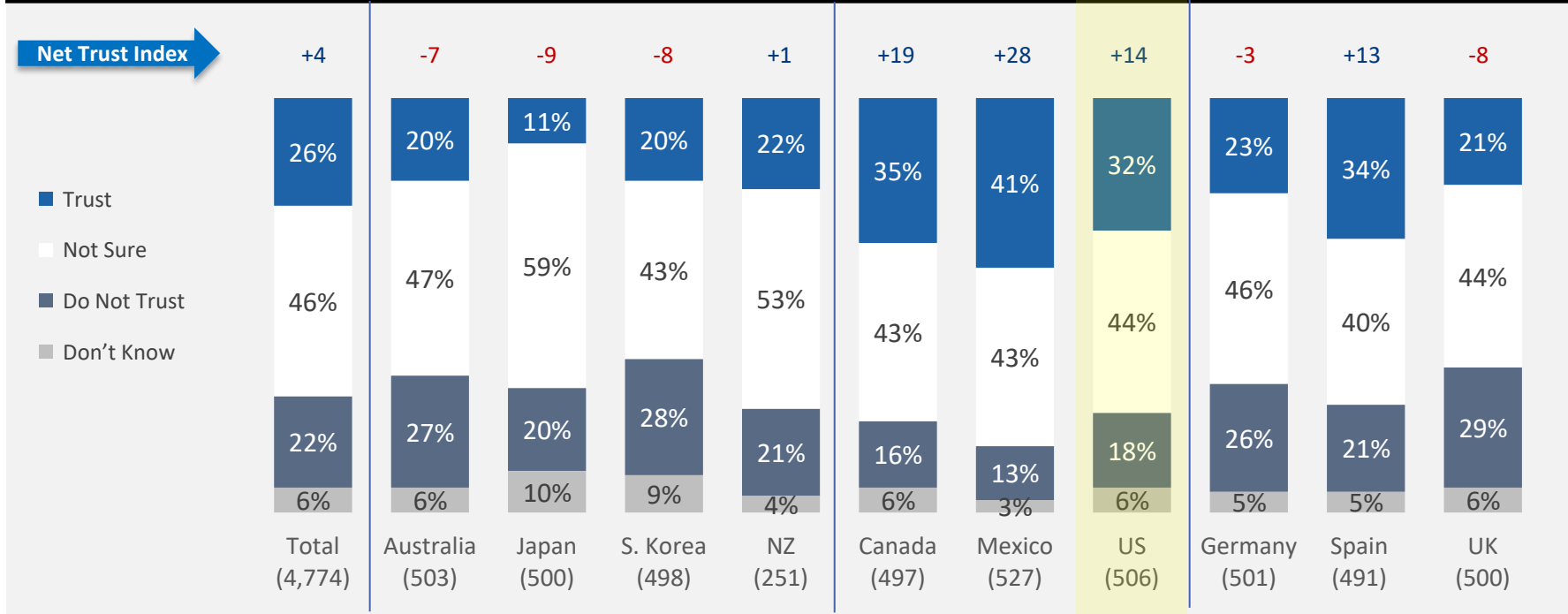
Net perceptions for trust in data analytics remain positive in the US and stable vs. 2022.

Trust in Data Analytics - Trended to 2022

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

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

On a net basis, trust in election & polling is equally divided among US consumers.

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Trust in Election & Opinion Polling

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

Legend:
- ■ Trust
- □ Not Sure
- ■ Do Not Trust
- ■ Don't Know
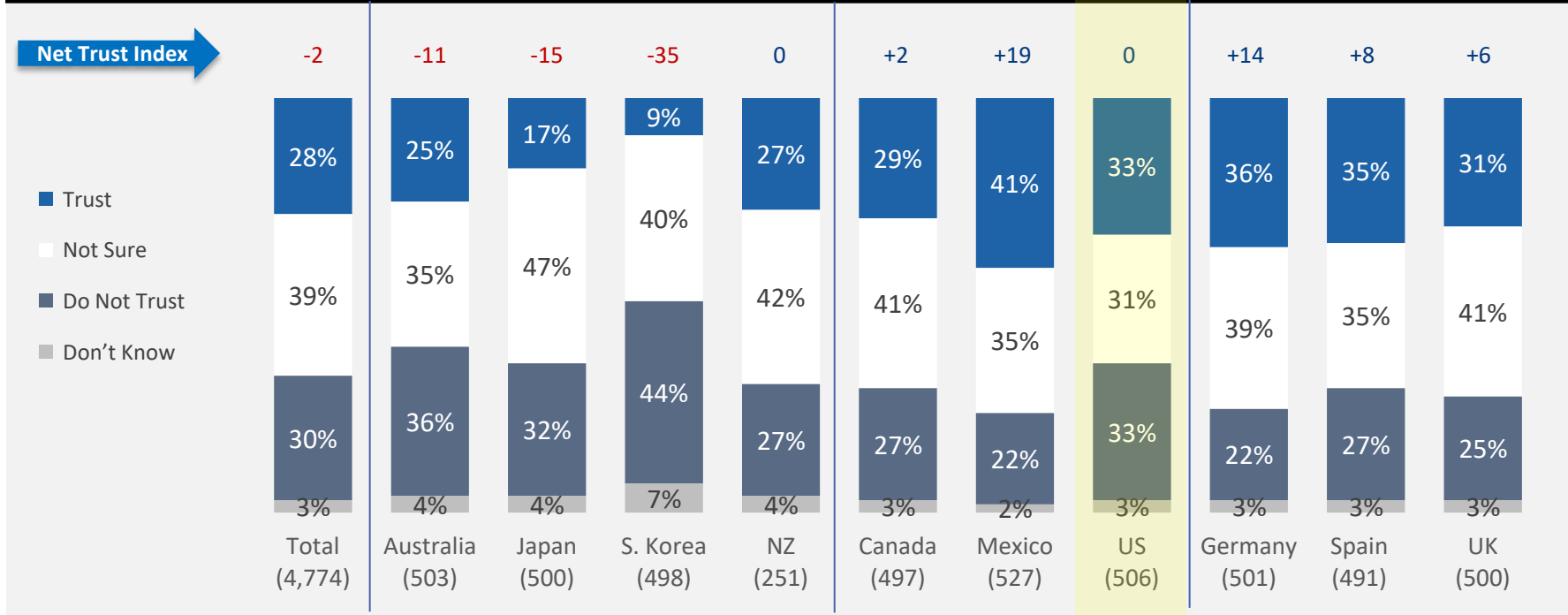
Net Trust Index = % Trust – % Do Not Trust

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

Trust in Election & Opinion Polling - Trended to 2022

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

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

BELIEVABILITY THAT MARKET RESEARCH IS BENEFICIAL

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

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US

Extent Market Research is Perceived to be Beneficial

	Yourself	Consumers	Business	Citizens
Vs. 2022	+6	+1	+1	0
Top 2 Box	56%	56%	68%	48%

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

Yourself:
- 29%
- 27%
- 22%
- 10%
- 6%
- 6%

Consumers:
- 27%
- 30%
- 28%
- 8%
- 3%
- 5%

Business:
- 39%
- 28%
- 19%
- 6%
- 1%
- 5%

Citizens:
- 24%
- 24%
- 32%
- 10%
- 4%
- 6%
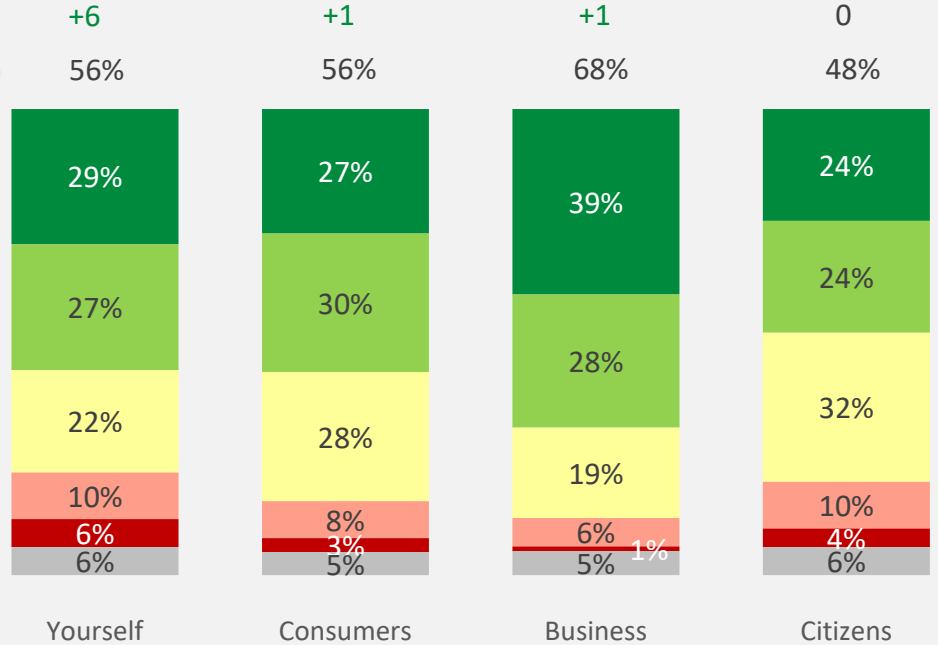
Overall, less than half feel that market research benefits them. That said, sentiment in the US is more favorable than the global average.

Extent Market Research is Perceived to be Beneficial to Yourself

Top 2 Box	Total (4,774)	Australia (503)	Japan (500)	S. Korea (498)	NZ (251)	Canada (497)	Mexico (527)	US (506)	Germany (501)	Spain (491)	UK (500)
	47%	39%	29%	50%	27%	53%	71%	56%	59%	51%	35%

Legend:
- 5 – Benefits completely (dark green)
- 4 (green)
- 3 (yellow)
- 2 (light red)
- 1 – Does not benefit at all (red)
- Don't Know (gray)

Response	Total	Australia	Japan	S. Korea	NZ	Canada	Mexico	US	Germany	Spain	UK
5 – Benefits completely	19%	12%	5%	11%	9%	21%	43%	29%	26%	21%	9%
4	28%	27%	23%	39%	18%	32%	27%	27%	33%	30%	26%
3	32%	38%	39%	38%	42%	27%	17%	22%	27%	30%	38%
2	10%	12%	13%	6%	16%	11%	5%	10%	8%	9%	15%
1 – Does not benefit at all	6%	8%	8%	1%	10%	6%	4%	6%	3%	5%	6%
Don't Know	5%	4%	11%	5%	5%	4%	4%	6%	3%	6%	7%

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

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

■ 2024   ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	46%	39%	29%	50%	53%	56%	59%	35%
2022	40%	34%	18%	45%	49%	50%	54%	30%
(n)	(3,505)	(503)	(500)	(498)	(497)	(506)	(501)	(500)
(n)	(3,534)	(504)	(500)	(501)	(494)	(503)	(502)	(530)

Data is based on comparable countries across waves.
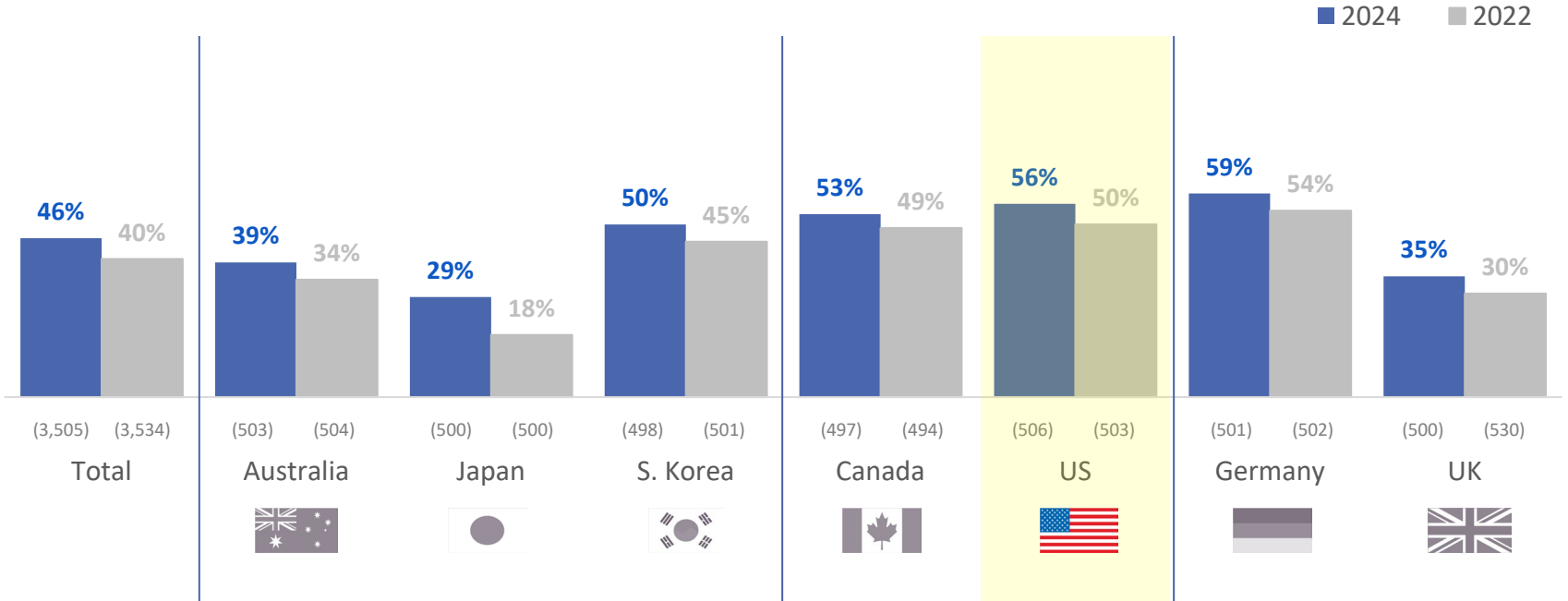
Most recognize some benefit of market research to consumers.

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Extent Market Research is Perceived to be Beneficial to Consumers

Top 2 Box

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

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

Globally, the perceived benefit of market research to consumers remains positive.

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

■ 2024   ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	52%	50%	40%	55%	58%	56%	66%	41%
2022	48%	47%	29%	53%	57%	55%	58%	40%
(n 2024)	(3,505)	(503)	(500)	(498)	(497)	(506)	(501)	(500)
(n 2022)	(3,534)	(504)	(500)	(501)	(494)	(503)	(502)	(530)

Data is based on comparable countries across waves.
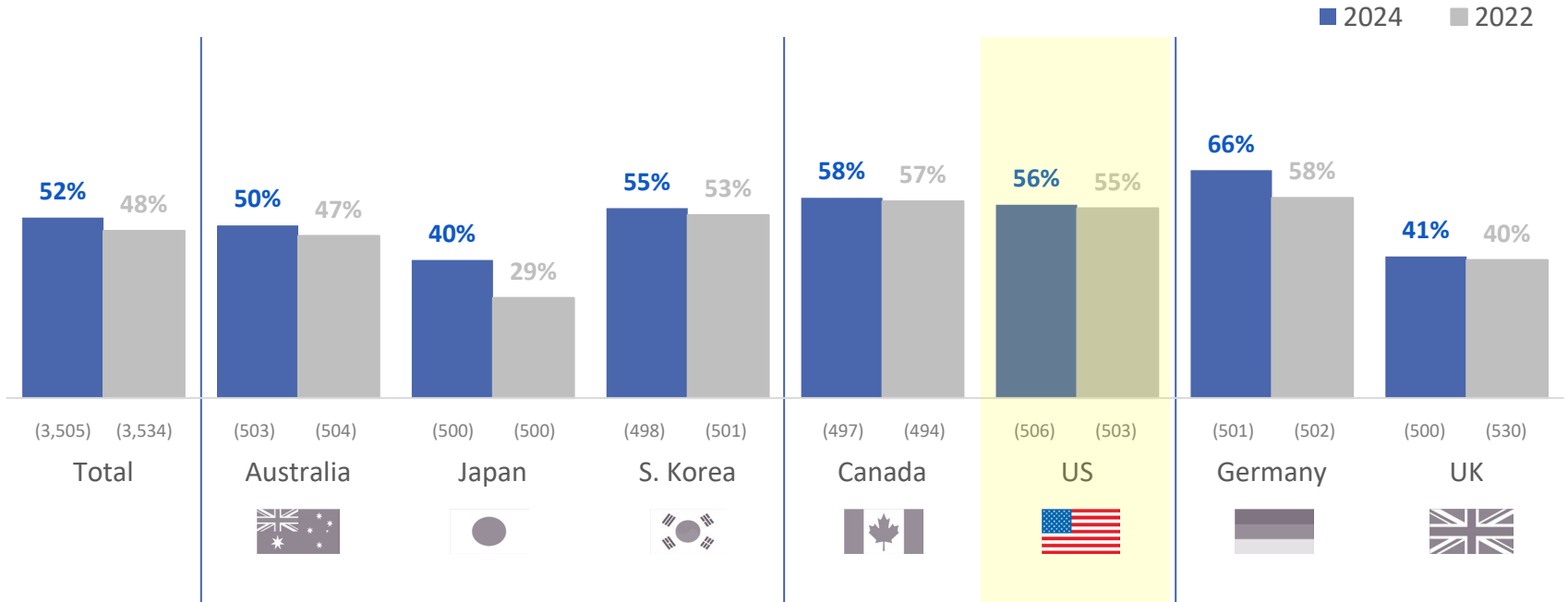
Many consider market research highly beneficial to businesses, with the US performing similarly to the global average.

Extent Market Research is Perceived to be Beneficial to Business

Top 2 Box	67%	69%	57%	45%	67%	73%	81%	68%	80%	72%	62%

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

	Total (4,774)	Australia (503)	Japan (500)	S. Korea (498)	NZ (251)	Canada (497)	Mexico (527)	US (506)	Germany (501)	Spain (491)	UK (500)
5 – Benefits completely	34%	28%	23%	9%	33%	39%	55%	39%	51%	40%	27%
4	33%	41%	33%	35%	35%	34%	26%	28%	30%	32%	35%
3	22%	19%	27%	42%	21%	19%	11%	19%	14%	20%	24%
2	4%	4%	5%	7%	6%	3%	3%	6%	2%	3%	5%
1 – Does not benefit at all	2%	2%	2%	1%	2%	2%	2%	1%	1%	1%	2%
Don't Know	5%	5%	10%	5%	3%	3%	2%	5%	3%	4%	7%
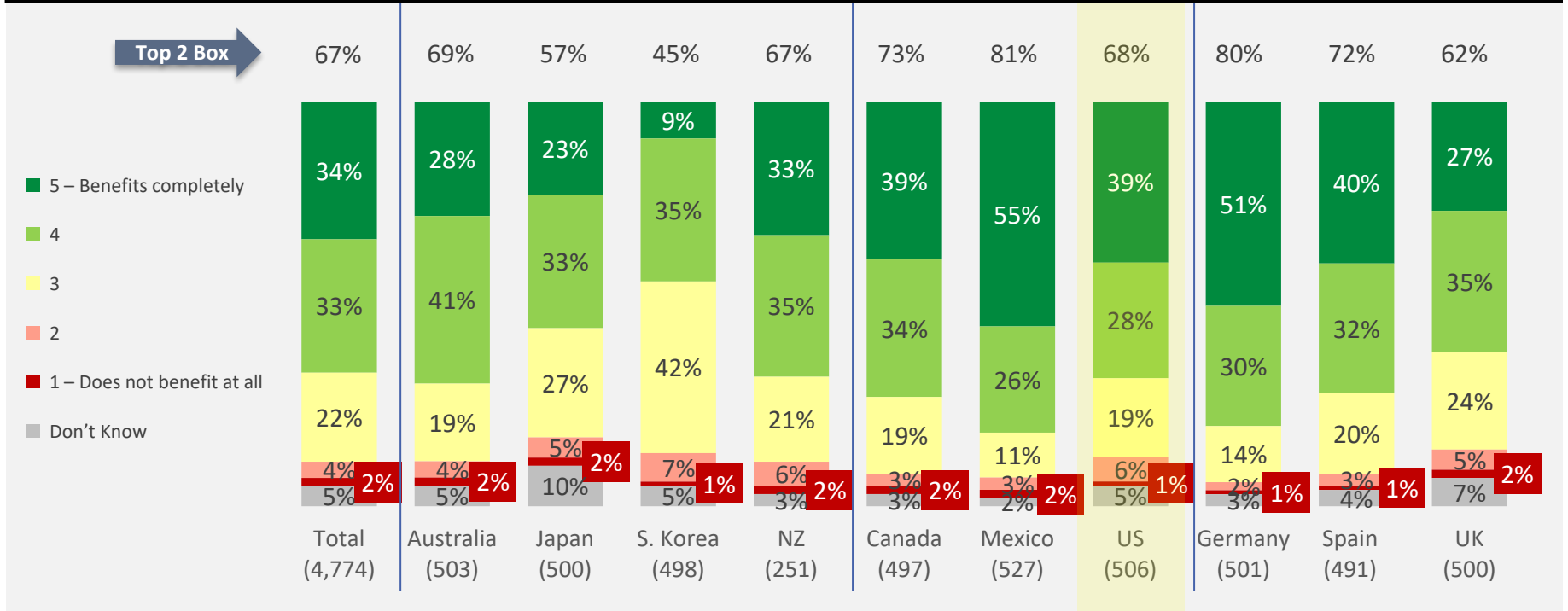
Extent Market Research is Perceived to be Beneficial to Business (Top 2 Box %) - Trended to 2022

■ 2024 ■ 2022

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

Data is based on comparable countries across waves.
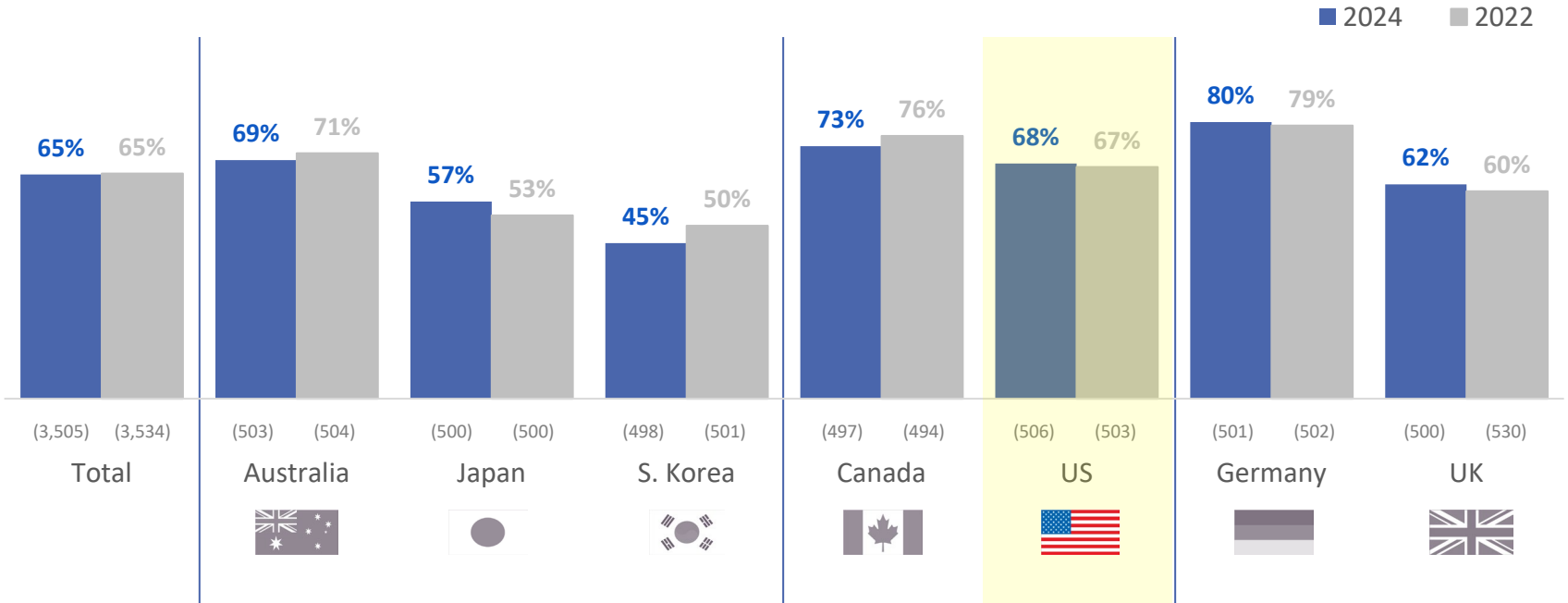
Nearly half recognize the benefits of market research to citizens. In this regard, the US is comparable to the global average.

Extent Market Research is Perceived to be Beneficial to Citizens

Top 2 Box

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

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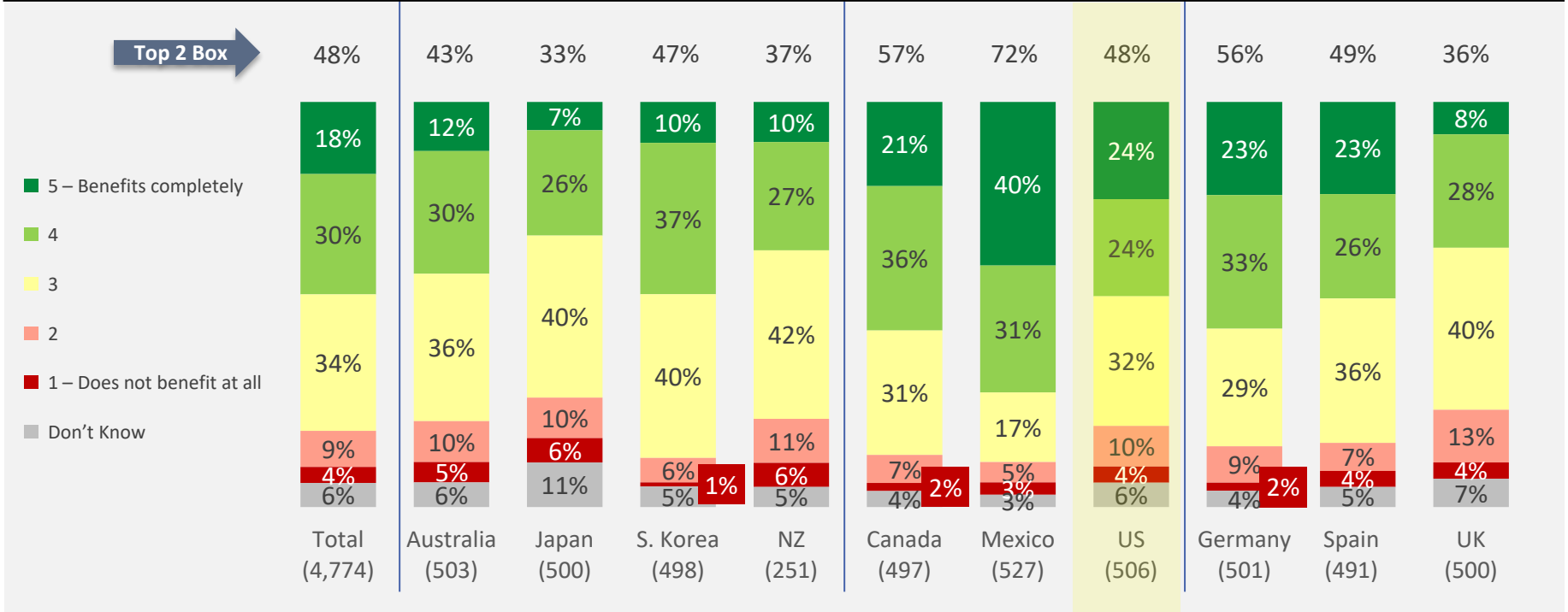
In the US, sentiment towards the benefits of market research to citizens is unchanged vs. 2022 and aligns with the global average.

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

Legend: ■ 2024 ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	46%	43%	33%	47%	57%	48%	56%	36%
2022	41%	35%	21%	48%	51%	48%	51%	35%
(n 2024)	(3,505)	(503)	(500)	(498)	(497)	(506)	(501)	(500)
(n 2022)	(3,534)	(504)	(500)	(501)	(494)	(503)	(502)	(530)

Data is based on comparable countries across waves.
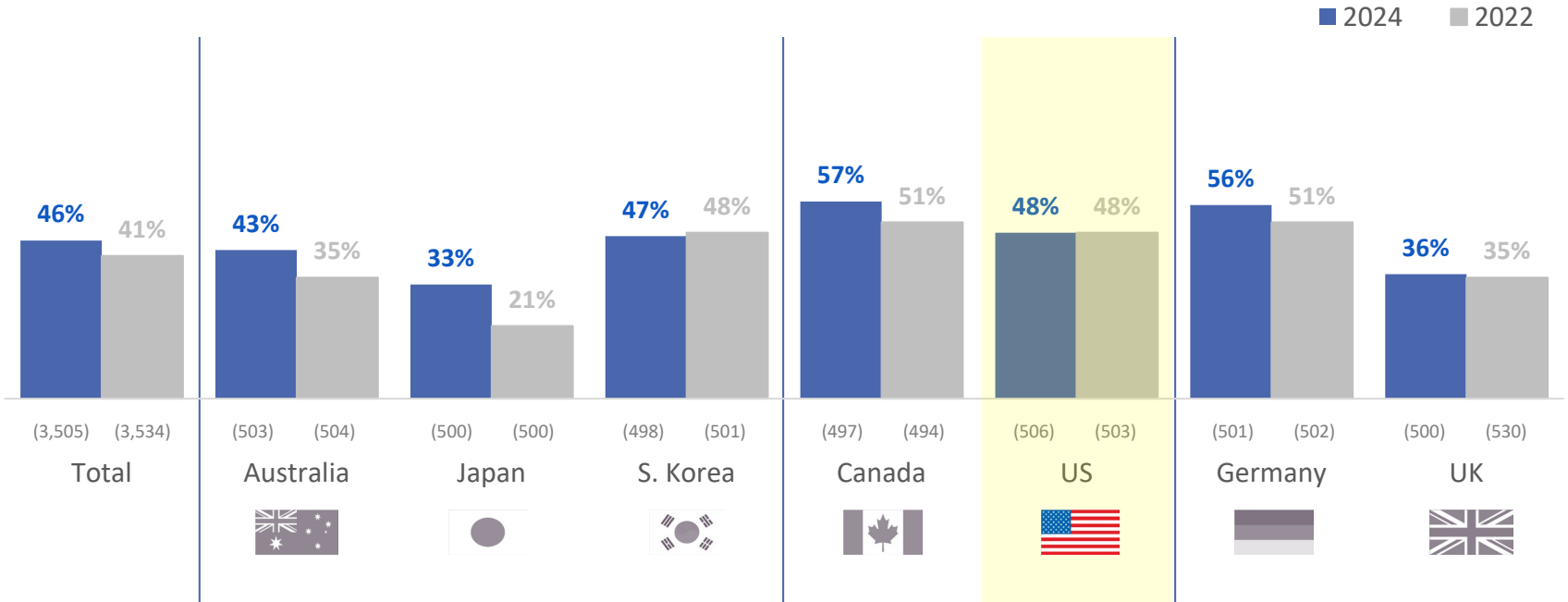
Globally, market research is deemed more beneficial to businesses vs. consumers.

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

Legend: Consumers (yellow), Business (green)

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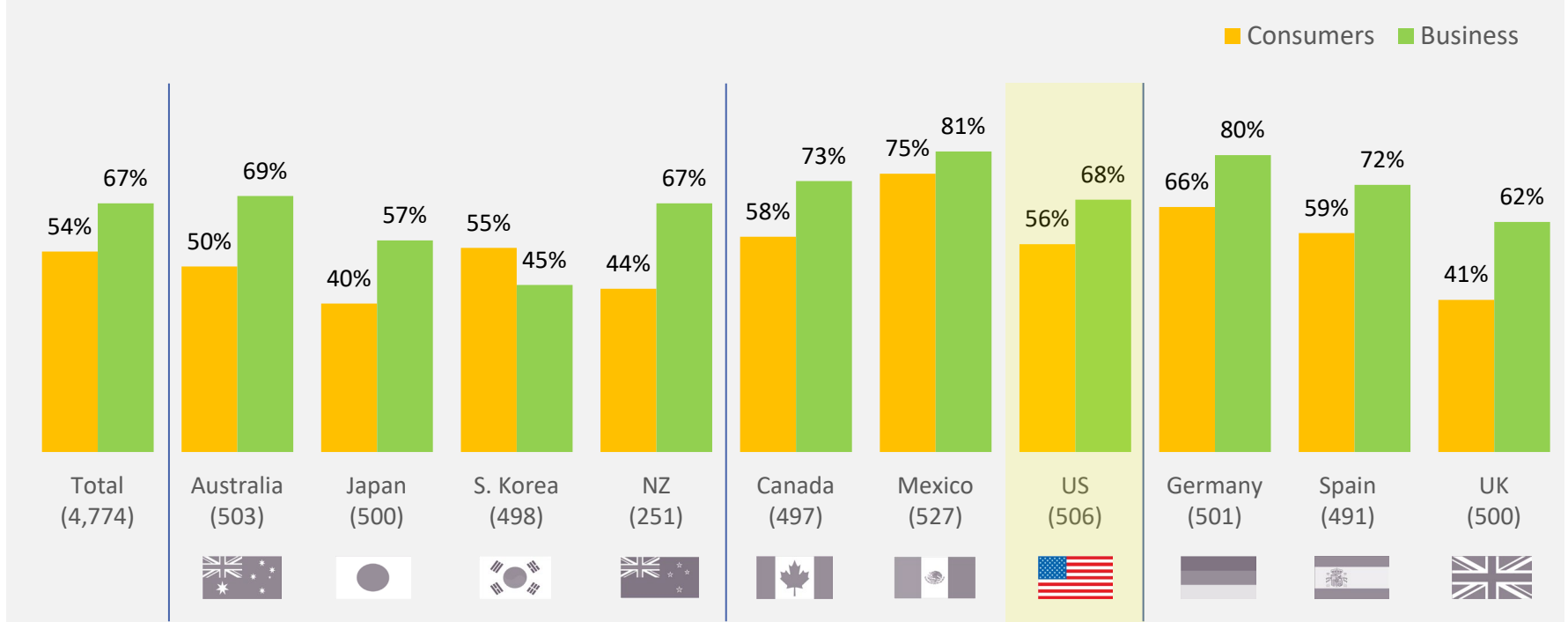
Likewise, market research is considered much more beneficial to businesses than to citizens on a global basis.

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

■ Citizens ■ Business

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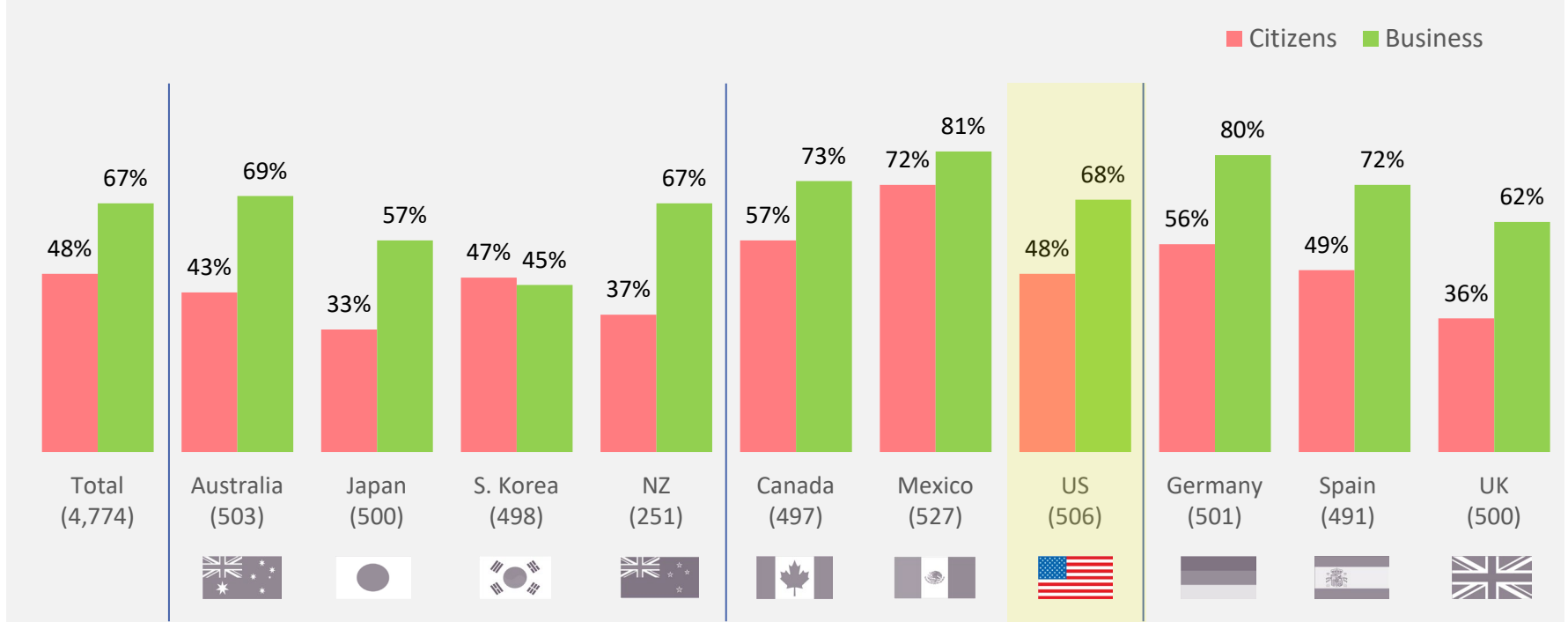
REACTIONS TO THE PARTICIPANT EXPERIENCE
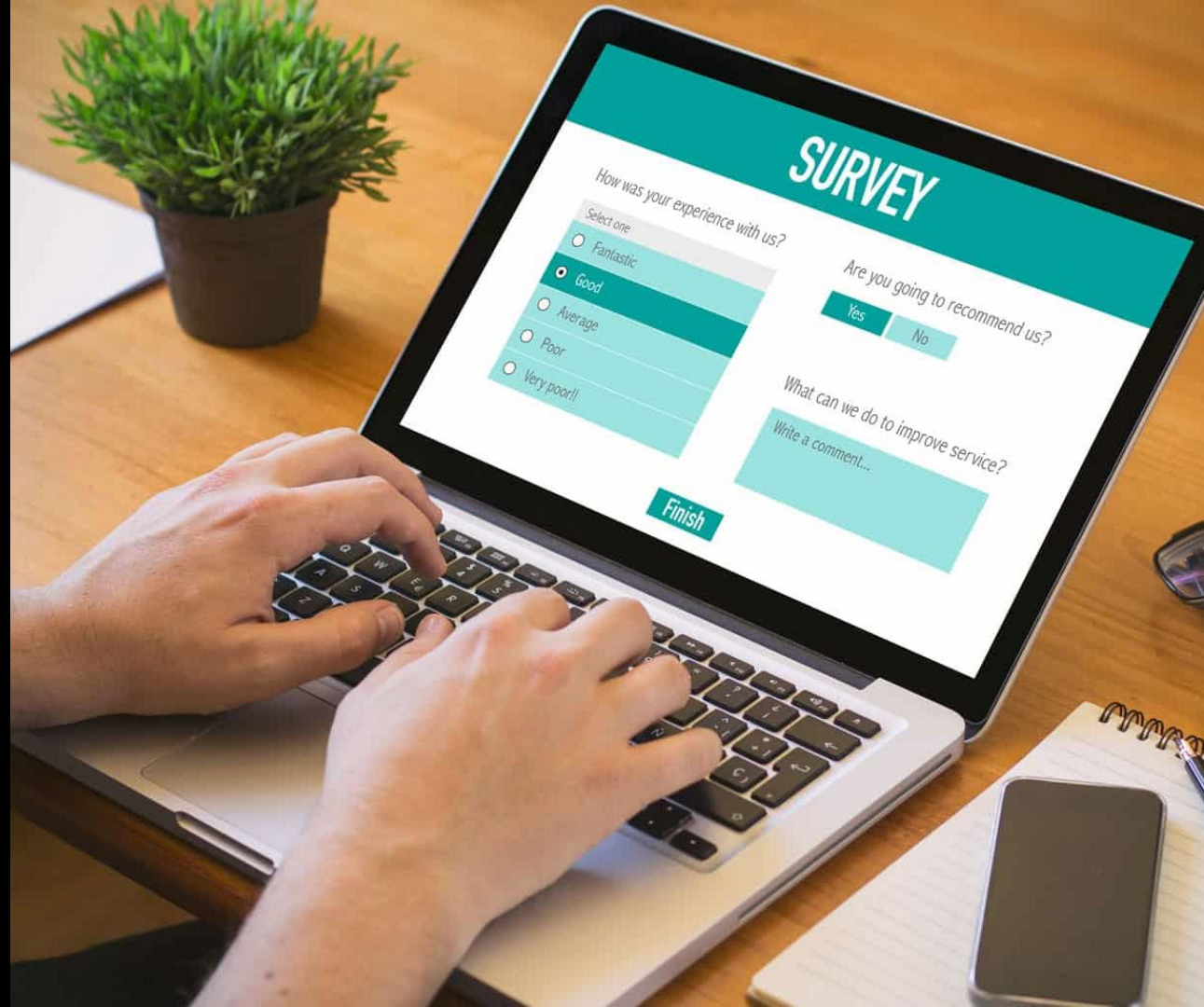
While survey length is generally considered acceptable, there's a sizeable portion who would appreciate shorter surveys.

Perception of Survey Length

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

■ Too long　□ Just right　■ Too short　■ Don't know
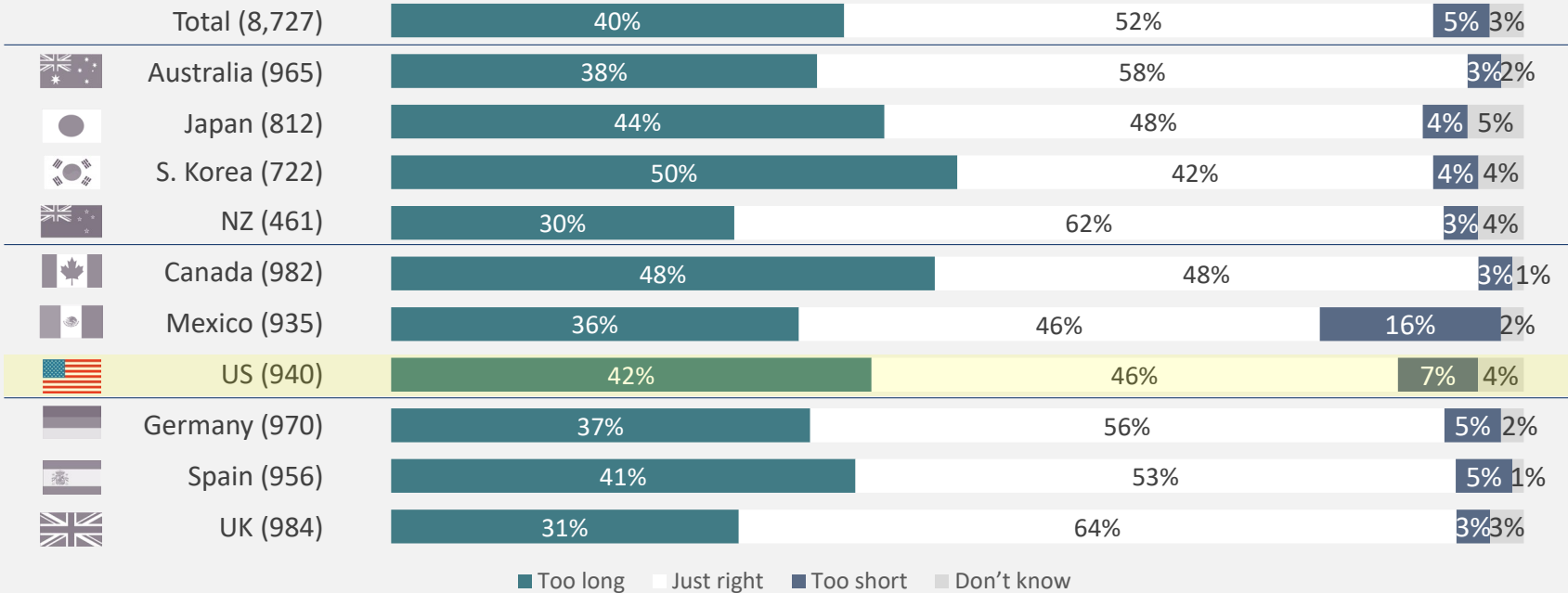
Perception of Survey Length (Too Long) - Trended to 2022

Legend: ■ 2024 ■ 2022

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

Data is based on comparable countries across waves.
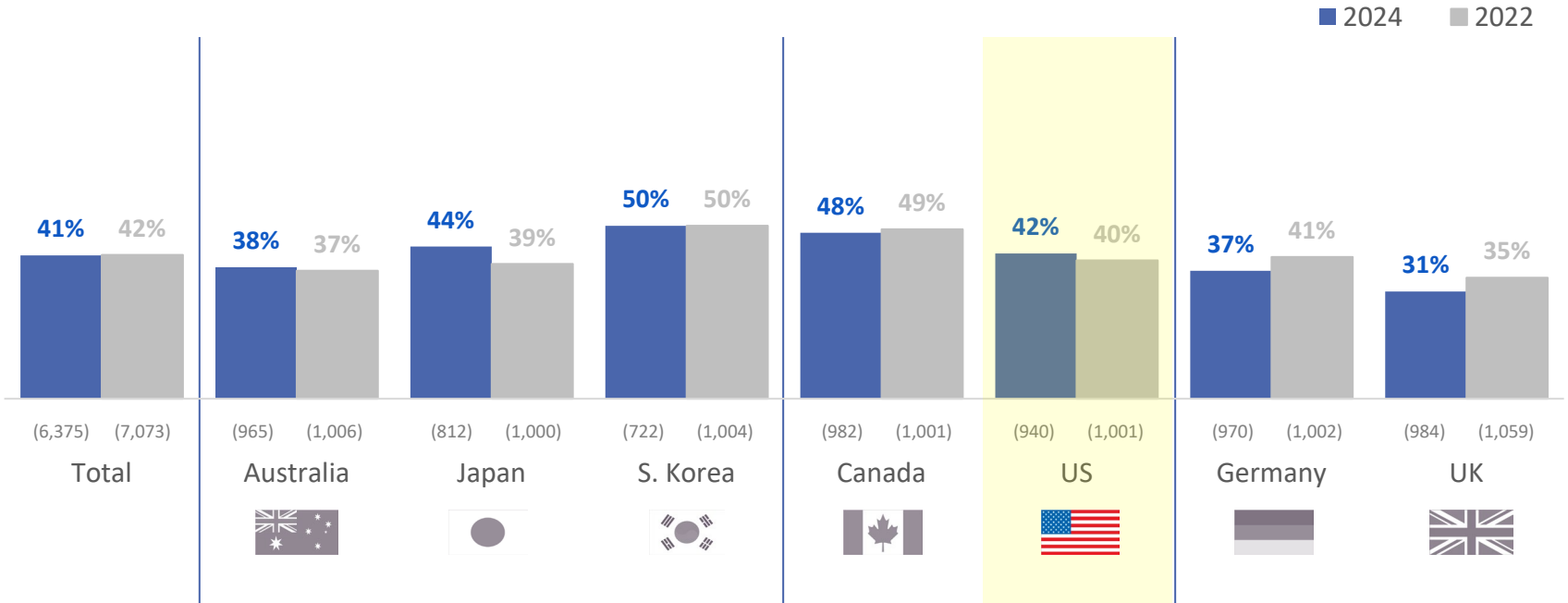
Survey enjoyment varies greatly across countries – those in the US are enjoying their survey experiences on par with the global average.

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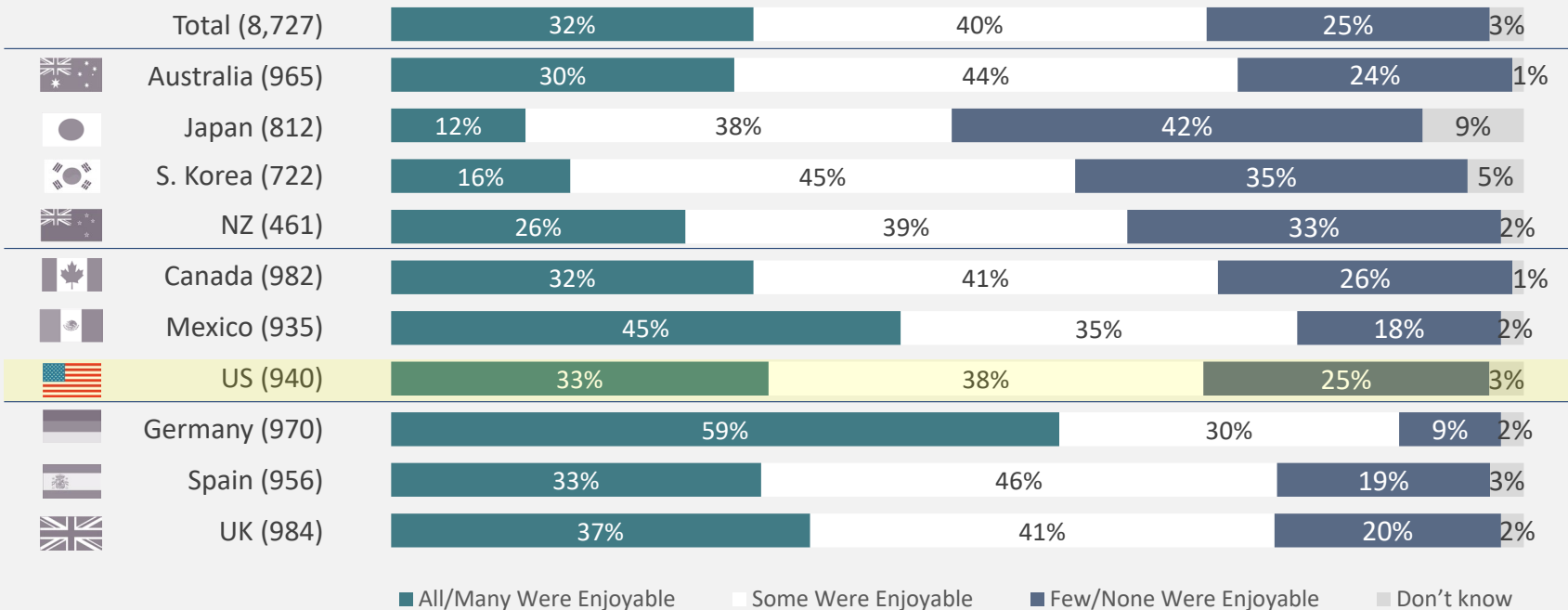
Country	All/Many Were Enjoyable	Some Were Enjoyable	Few/None Were Enjoyable	Don't know
Total (8,727)	32%	40%	25%	3%
Australia (965)	30%	44%	24%	1%
Japan (812)	12%	38%	42%	9%
S. Korea (722)	16%	45%	35%	5%
NZ (461)	26%	39%	33%	2%
Canada (982)	32%	41%	26%	1%
Mexico (935)	45%	35%	18%	2%
US (940)	33%	38%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

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

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

■ 2024   ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	31%	30%	12%	16%	32%	33%	59%	37%
2022	35%	32%	11%	18%	38%	37%	60%	47%
2024 (n)	(6,375)	(965)	(812)	(722)	(982)	(940)	(970)	(984)
2022 (n)	(7,073)	(1,006)	(1,000)	(1,004)	(1,001)	(1,001)	(1,002)	(1,059)

Data is based on comparable countries across waves.
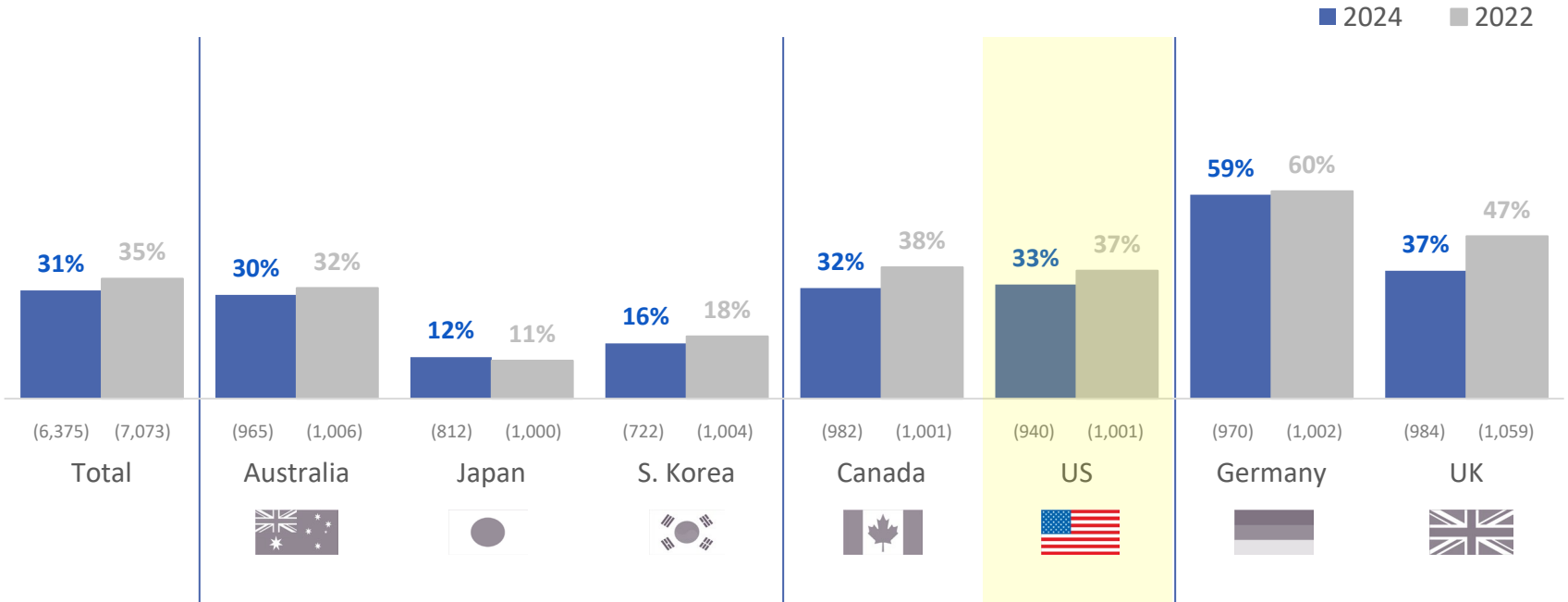
The stronger the perception of survey length being "just right," the more likely respondents enjoyed the survey experience.

Relationship Between Survey Length & Enjoyability

Too Long/Too Short + High Enjoyment

Just Right + High Enjoyment

All/Many Survey are Enjoyable

Germany

Mexico

US   Canada   Spain   UK

Australia

New Zealand

South Korea

Japan

Too Long/Too Short + Low Enjoyment

Just Right + Low Enjoyment

Survey Length is Just Right
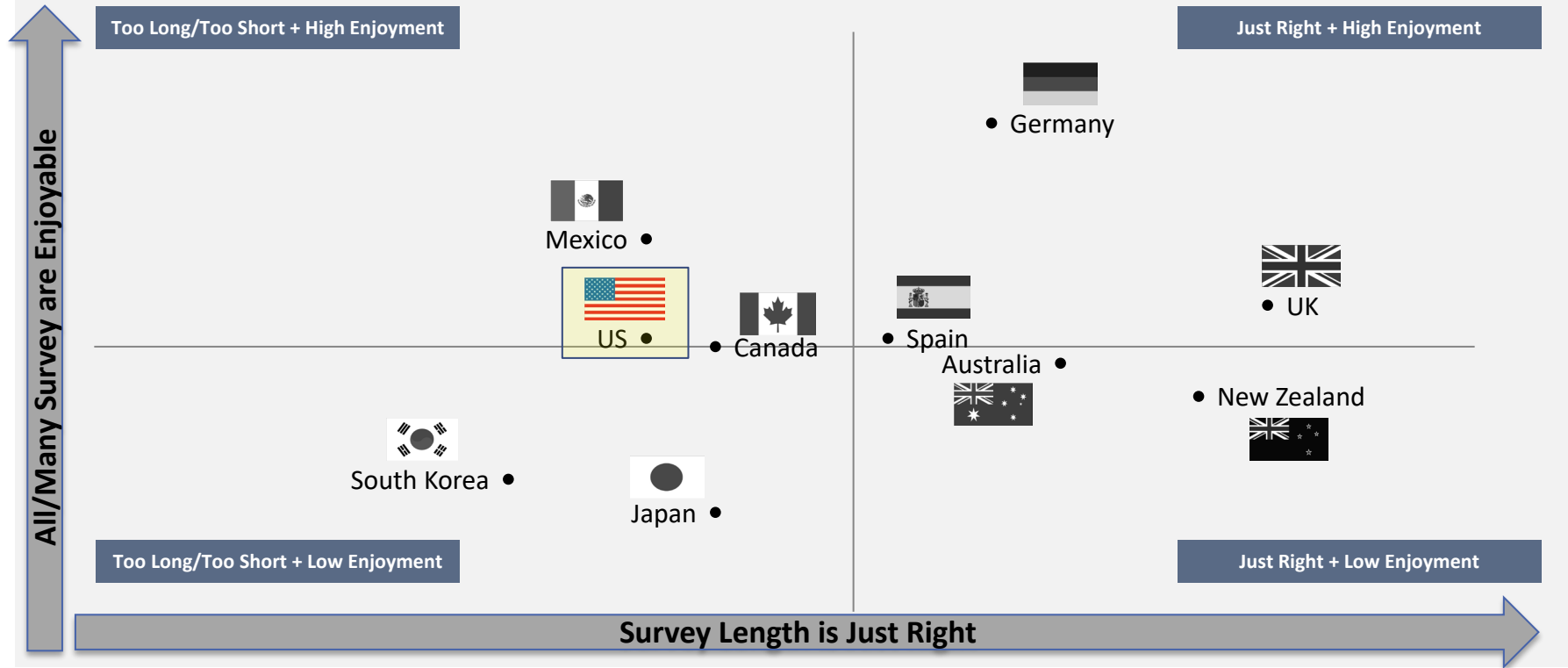
PERSONAL DATA USE

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

US

Familiarity with Personal Data Collection & Use

Not Very/At All Familiar

2024: 28%

Very/Somewhat Familiar

2024: 66%

6%

7%

18%

21%

48%
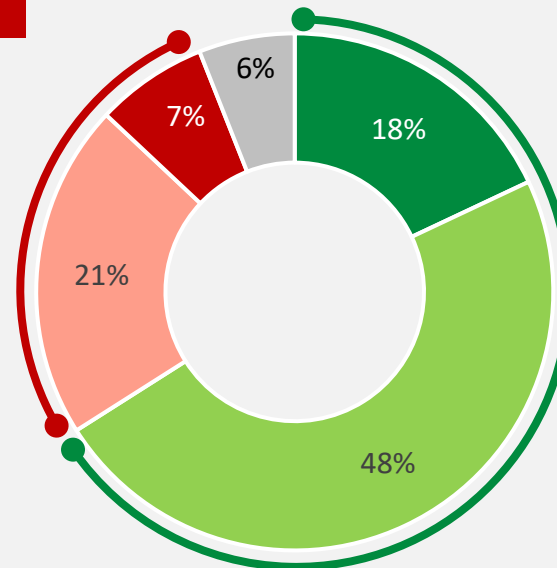
- Very familiar
- Somewhat familiar
- Not very familiar
- Not at all familiar
- Don't Know

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

Familiarity with Personal Data Collection & Use

Top 2 Box	Total (4,789)	Australia (500)	Japan (500)	S. Korea (504)	NZ (250)	Canada (503)	Mexico (524)	US (500)	Germany (499)	Spain (509)	UK (500)
	59%	64%	30%	49%	61%	66%	68%	66%	70%	60%	61%

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

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

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

■ 2024   ■ 2022

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

Misuse of personal data continues to be major concern for Americans.

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US

Level of Concern Regarding Misuse of Personal Data

Not Very/At All Concerned

| 2024: 14% |
| 2022: 20% |

Very/Somewhat Concerned

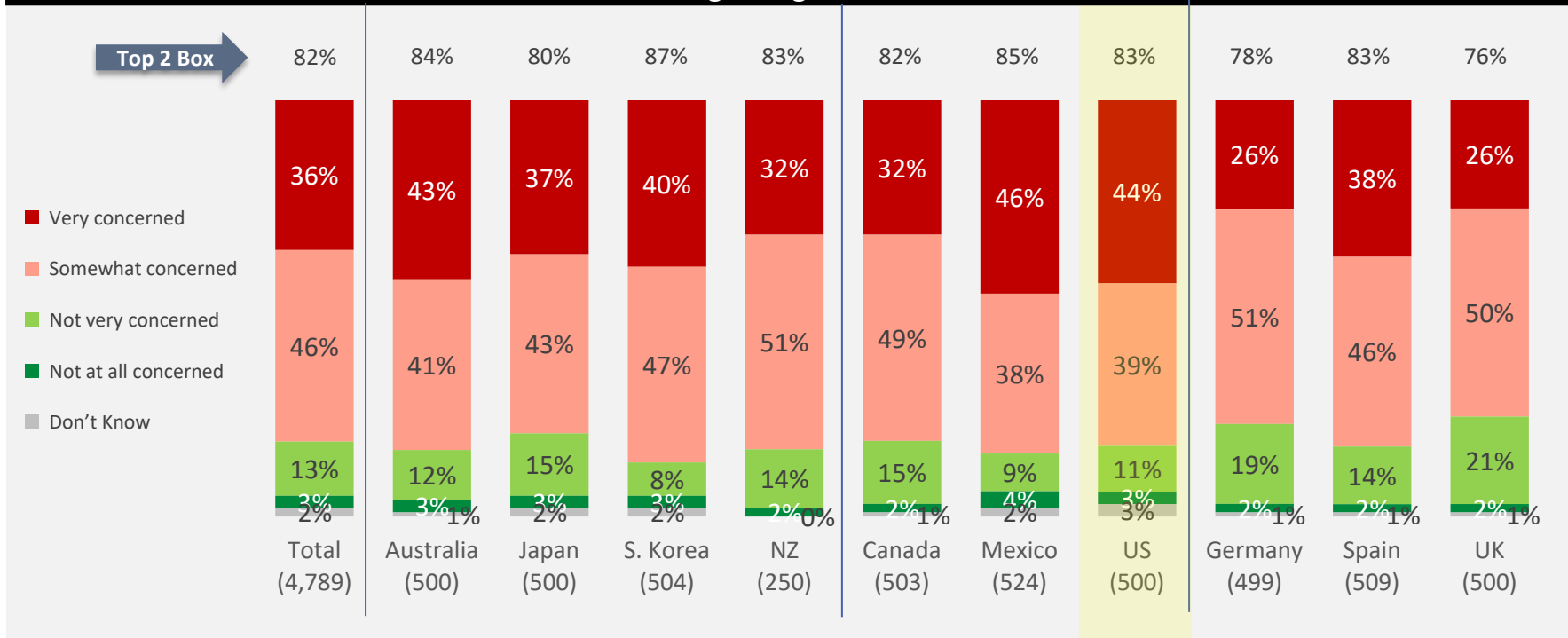| 2024: 83% |
| 2022: 77% |

3%

3%

11%

44%

39%
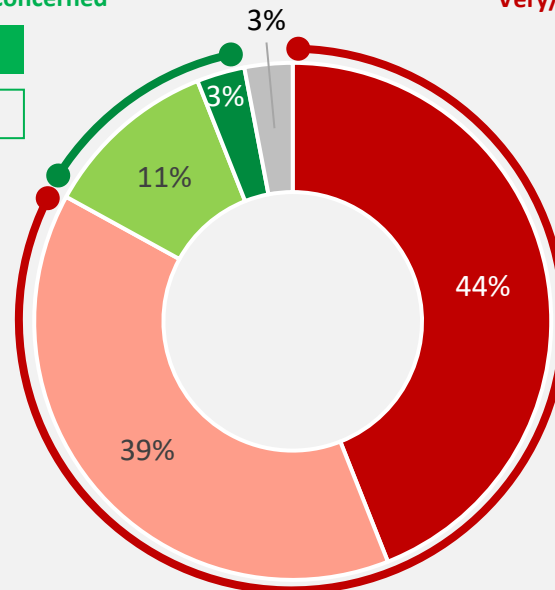
- Very concerned
- Somewhat concerned
- Not very concerned
- Not at all concerned
- Don't know/Prefer not to say

Concerns about the misuse of personal data are consistent globally.

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Level of Concern Regarding Misuse of Personal Data

Top 2 Box	82%	84%	80%	87%	83%	82%	85%	83%	78%	83%	76%
Very concerned	36%	43%	37%	40%	32%	32%	46%	44%	26%	38%	26%
Somewhat concerned	46%	41%	43%	47%	51%	49%	38%	39%	51%	46%	50%
Not very concerned	13%	12%	15%	8%	14%	15%	9%	11%	19%	14%	21%
Not at all concerned	3%	3%	3%	3%	2%	2%	4%	3%	2%	2%	2%
Don't Know	2%	1%	2%	2%	0%	1%	2%	3%	1%	1%	1%
	Total (4,789)	Australia (500)	Japan (500)	S. Korea (504)	NZ (250)	Canada (503)	Mexico (524)	US (500)	Germany (499)	Spain (509)	UK (500)

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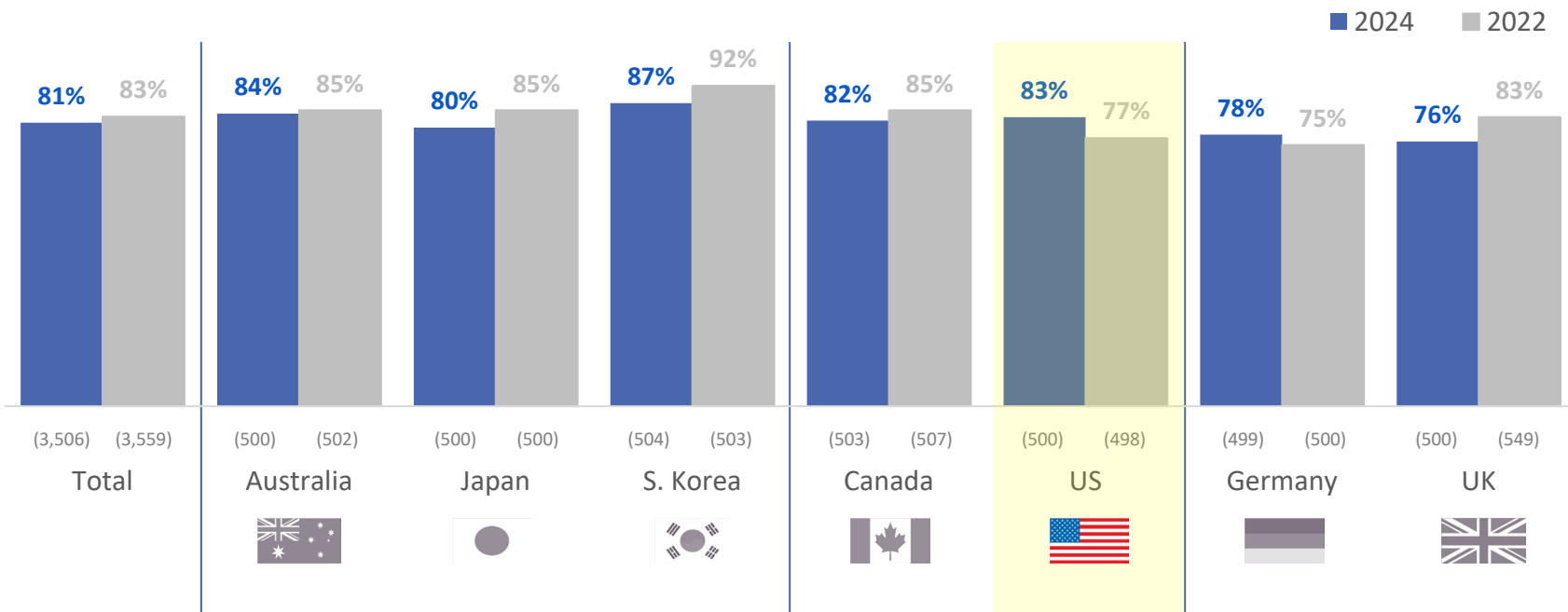
■ 2024   ■ 2022

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

Relationship Between Familiarity & Concern of Misuse of Personal Data Use

Concern with Personal Data Misuse

Low Familiarity + Low Concern

High Familiarity + Low Concern

UK

Germany

Japan

Spain

Canada

New Zealand

Australia

US

Mexico

South Korea

Low Familiarity + High Concern

High Familiarity + High Concern

Familiarity with How Personal Data is Collected & Used
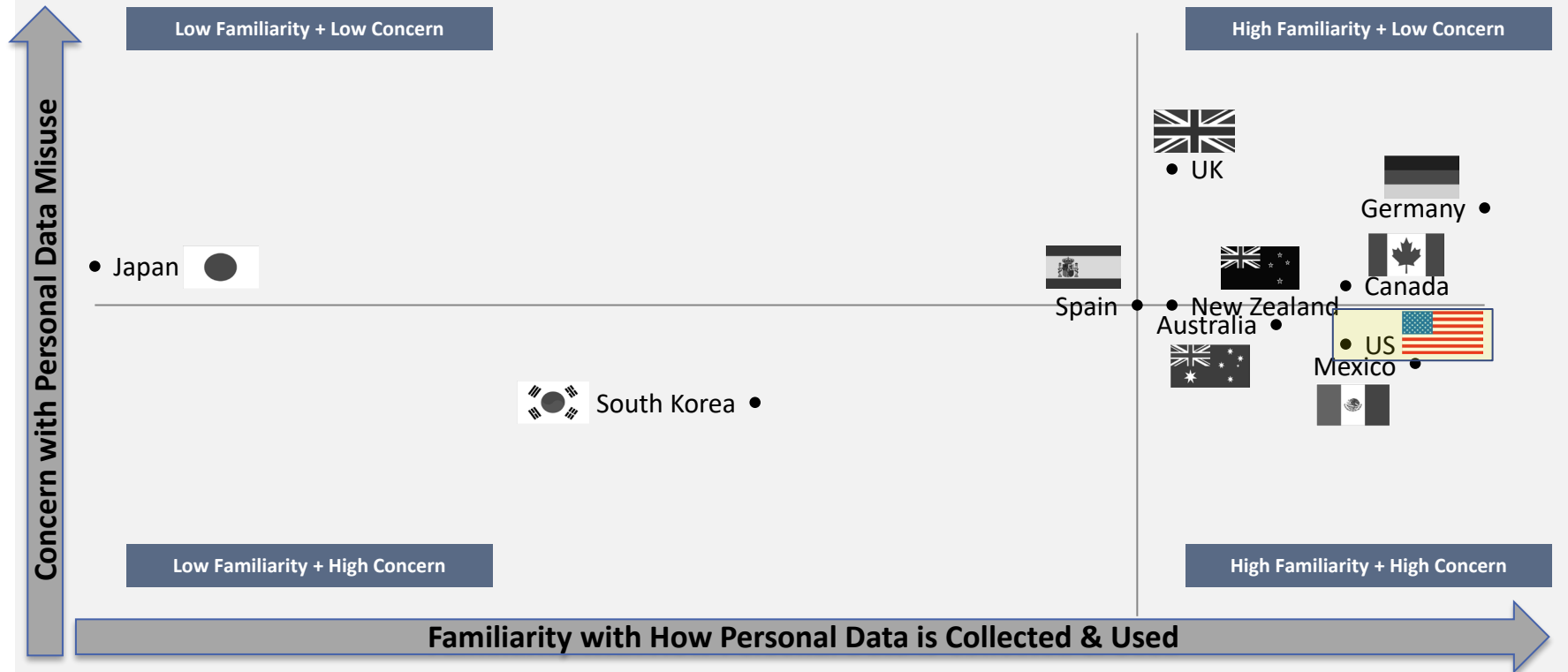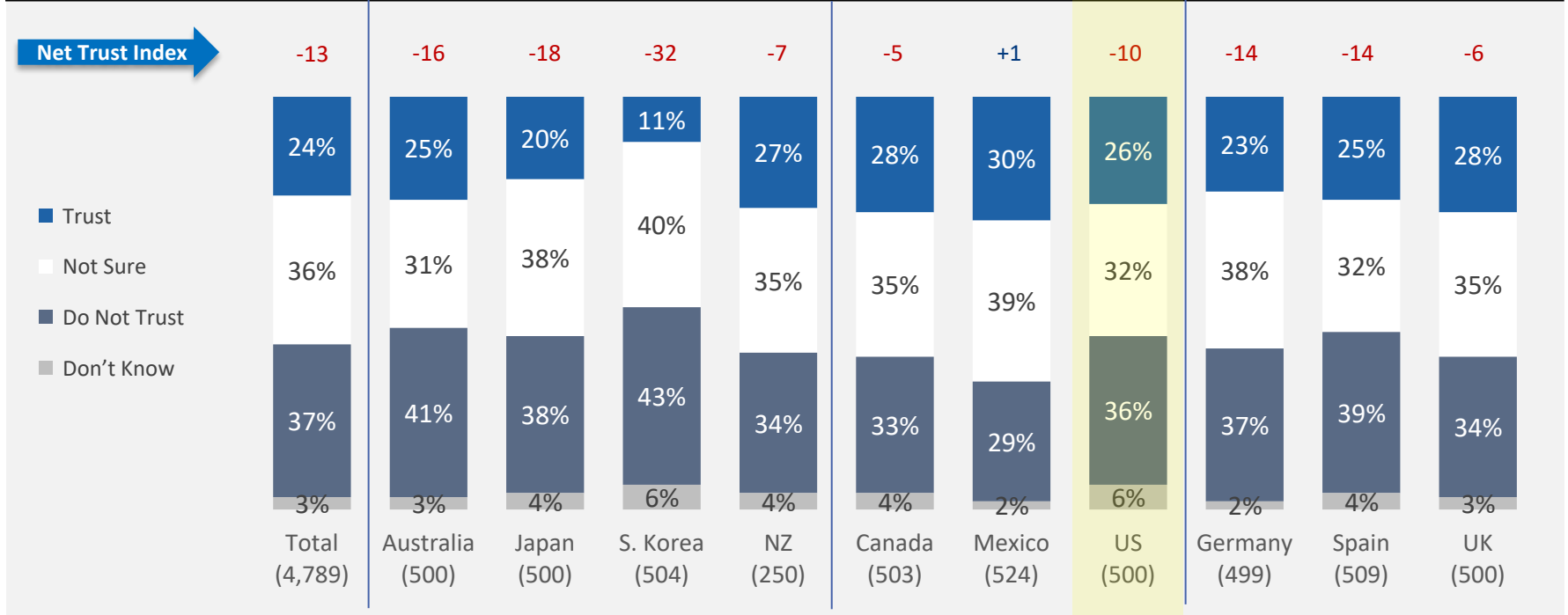
PROTECTION & USE OF PERSONAL DATA

Concern exists in all countries regarding trust in organizations' abilities to protect and use consumer data responsibly. In this regard, the US aligns with the global average.

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

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

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

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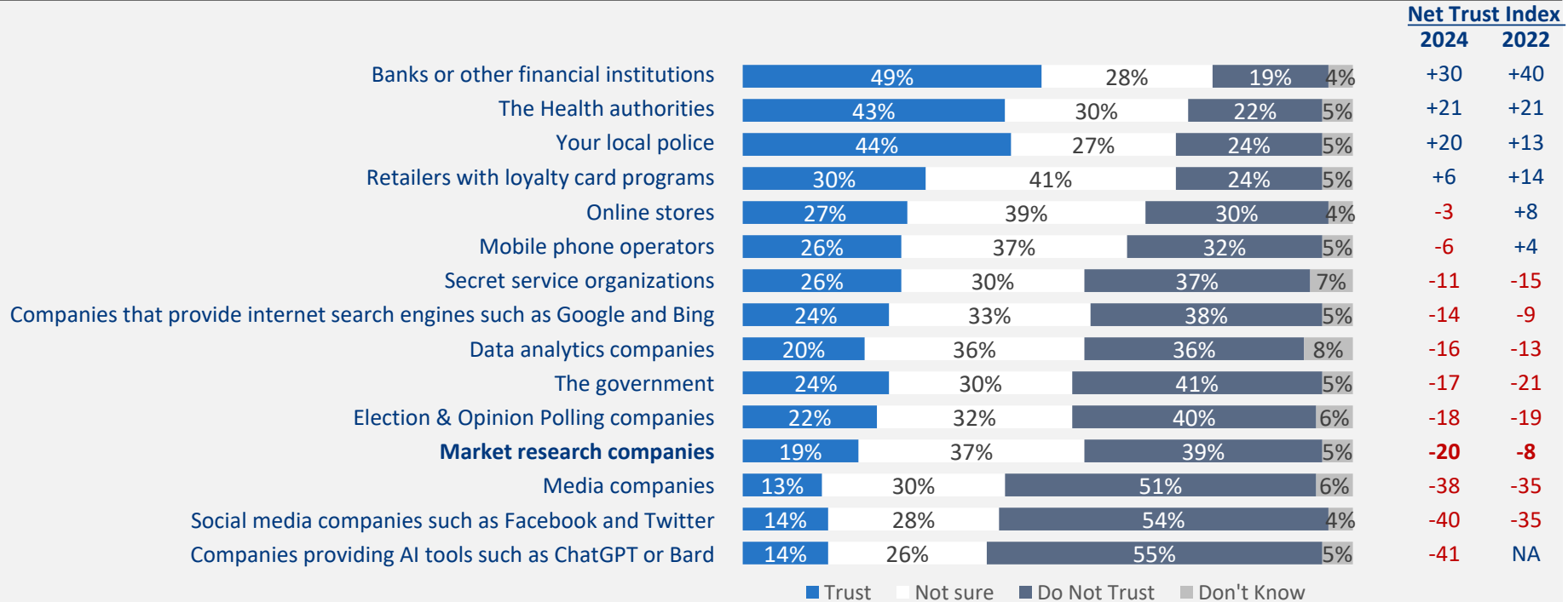*†Scores are an average across the 15 industries/organizations analyzed*

Companies most trusted to guard against the misuse of personal data in the US are those in financial, heath and law enforcement sectors. Conversely, media companies, AI providers and social media platforms face the most distrust. Market research firms also rank towards the bottom in this regard.

GLOBAL RESEARCH BUSINESS NETWORK
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US

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

	Trust	Not sure	Do Not Trust	Don't Know	Net Trust Index 2024	Net Trust Index 2022
Banks or other financial institutions	49%	28%	19%	4%	+30	+40
The Health authorities	43%	30%	22%	5%	+21	+21
Your local police	44%	27%	24%	5%	+20	+13
Retailers with loyalty card programs	30%	41%	24%	5%	+6	+14
Online stores	27%	39%	30%	4%	-3	+8
Mobile phone operators	26%	37%	32%	5%	-6	+4
Secret service organizations	26%	30%	37%	7%	-11	-15
Companies that provide internet search engines such as Google and Bing	24%	33%	38%	5%	-14	-9
Data analytics companies	20%	36%	36%	8%	-16	-13
The government	24%	30%	41%	5%	-17	-21
Election & Opinion Polling companies	22%	32%	40%	6%	-18	-19
Market research companies	19%	37%	39%	5%	**-20**	**-8**
Media companies	13%	30%	51%	6%	-38	-35
Social media companies such as Facebook and Twitter	14%	28%	54%	4%	-40	-35
Companies providing AI tools such as ChatGPT or Bard	14%	26%	55%	5%	-41	NA

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

Net Trust Index = % Trust – % Do Not Trust

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US

Trust in Market Research

37%

39%

-20
(Net Trust Index)

-12
(vs. 2022)

19%

5%

Trust in Data Analytics

36%

36%

-16
(Net Trust Index)

-3
(vs. 2022)

20%

8%

Trust in Election & Opinion Polling

32%

40%

-18
(Net Trust Index)

+1
(vs. 2022)

22%

6%

■ 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 the US and most other countries.

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Trust in Market Research to Protect & Appropriately Use Personal Data

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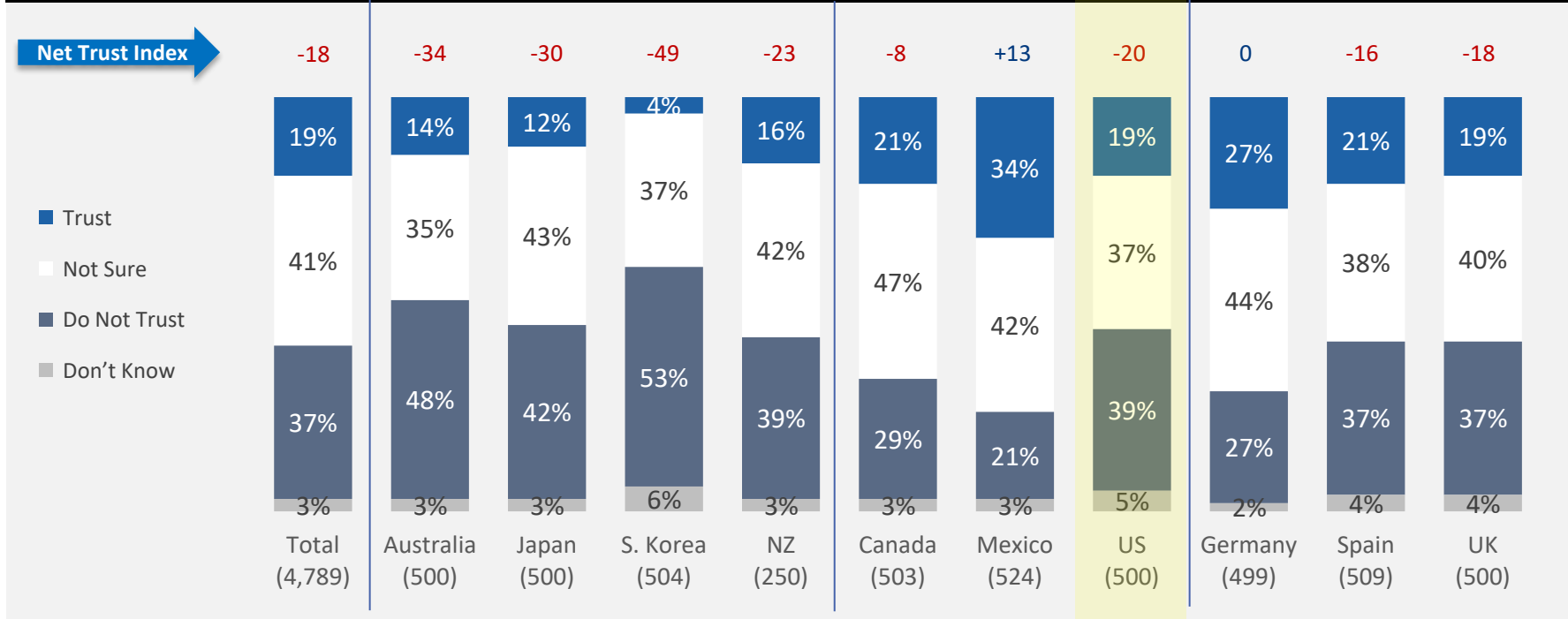
	Total (4,789)	Australia (500)	Japan (500)	S. Korea (504)	NZ (250)	Canada (503)	Mexico (524)	US (500)	Germany (499)	Spain (509)	UK (500)
Net Trust Index	-18	-34	-30	-49	-23	-8	+13	-20	0	-16	-18
Trust	19%	14%	12%	4%	16%	21%	34%	19%	27%	21%	19%
Not Sure	41%	35%	43%	37%	42%	47%	42%	37%	44%	38%	40%
Do Not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

- 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.

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

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

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

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

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

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

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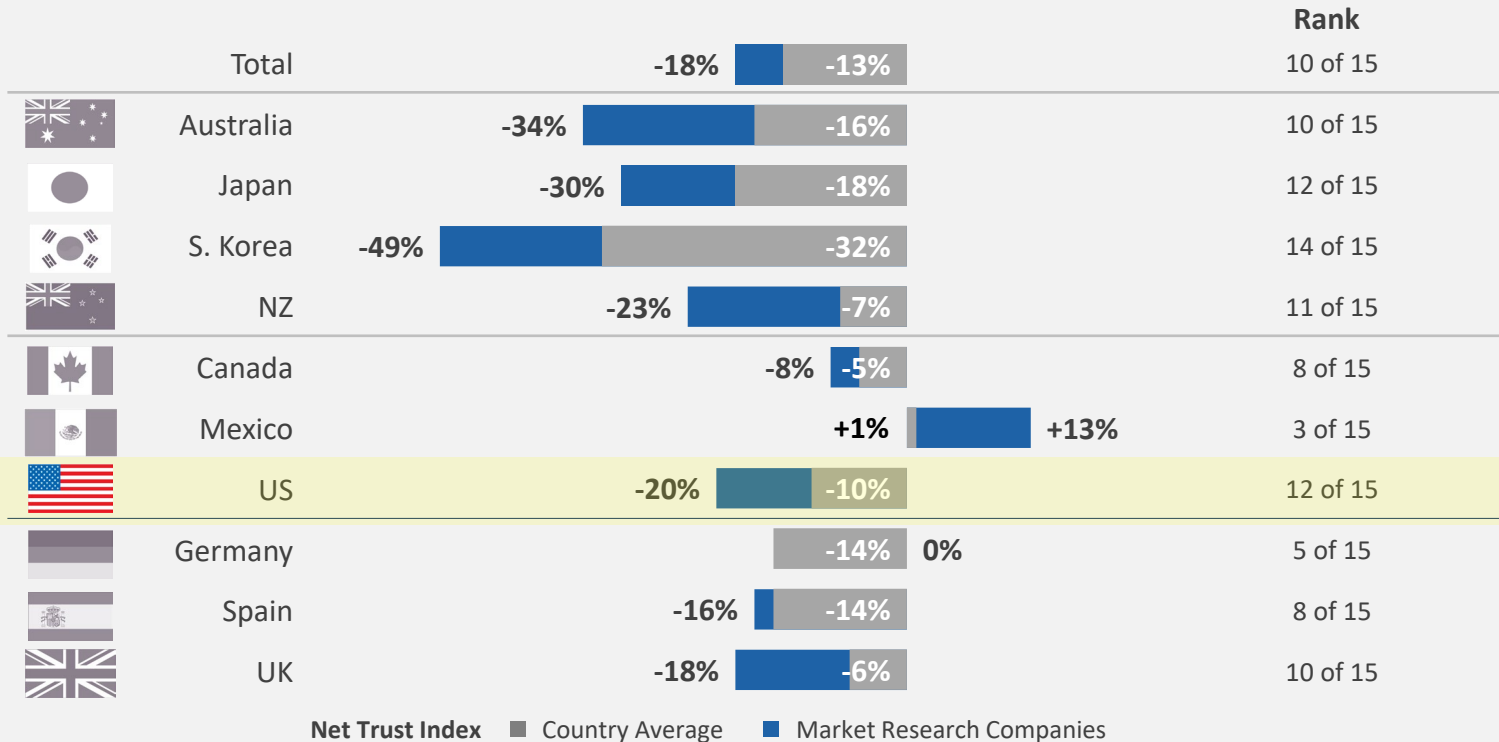
Net Trust Index = % Trust − % Do Not Trust

Globally, there's deep distrust in data analytics companies' perceived handling of personal data. In this regard, net trust in the US is slightly higher than the global average.

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Trust in Data Analytics to Protect & Appropriately Use Personal Data

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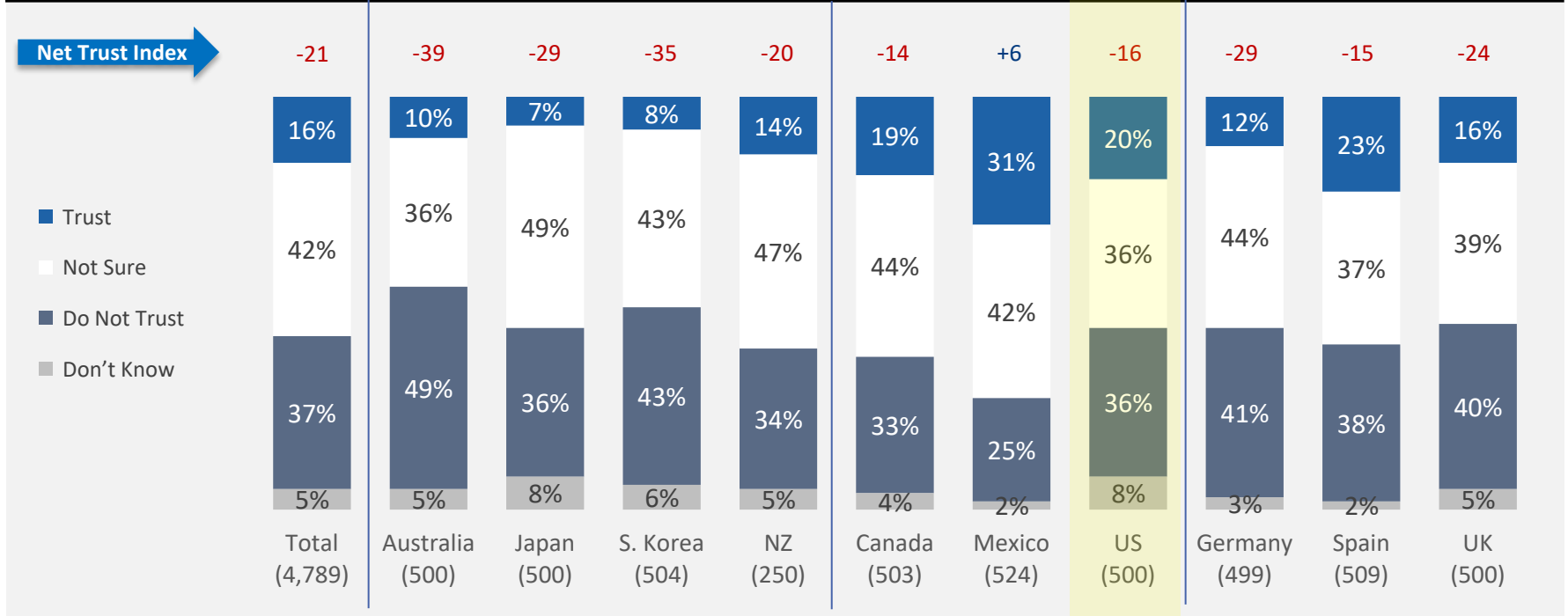
Net Trust Index = % Trust − % Do Not Trust

Net trust remains negative overall, with distrust slightly on the rise in the US and most other countries.

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

		Total*	Australia	Japan	S. Korea	Canada	US	Germany	UK
Net Trust Index	**2024**	**-27**	**-39**	**-29**	**-35**	**-14**	**-16**	**-29**	**-24**
	vs. 2022	-5	-4	-6	-5	+2	-3	-10	-9
% Trust	**2024**	**13%**	**10%**	**7%**	**8%**	**19%**	**20%**	**12%**	**16%**
	vs. 2022	-2%	-2%	--	-2%	+2%	-1%	-5%	-6%
% Do Not Trust	**2024**	**40%**	**49%**	**36%**	**43%**	**33%**	**36%**	**41%**	**40%**
	vs. 2022	+3%	+2%	+6%	+3%	--	+2%	+5%	+3%

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

Trust in polling companies' data handling varies widely, with the US performing below the global average.

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

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

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

Net Trust Index = % Trust − % Do Not Trust

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

		Total*	Australia	Japan	S. Korea	Canada	US	Germany	UK
Net Trust Index	**2024**	**-13**	**-13**	**-28**	**-49**	**+2**	**-18**	**+5**	**+8**
	vs. 2022	-4	-1	-5	-9	--	+1	-14	-1
% Trust	**2024**	**23%**	**24%**	**15%**	**5%**	**29%**	**22%**	**30%**	**36%**
	vs. 2022	-1%	-3%	+4%	-2%	-2%	-1%	-8%	+3%
% Do Not Trust	**2024**	**36%**	**37%**	**43%**	**54%**	**27%**	**40%**	**25%**	**28%**
	vs. 2022	+3%	-2%	+9%	+7%	-2%	-2%	+5%	+4%

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

DRIVERS OF TRUST IN MARKET RESEARCH TO PROTECT & APPROPRIATELY USE PERSONAL DATA

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

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US

Appropriate Use of Personal Data by Market Research

Bottom 2 Box: Inappropriate

| 2024: 27% |
| 2022: 21% |

Top 2 Box: Appropriate

| 2024: 23% |
| 2022: 30% |

- 10%
- 9%
- 13%
- 41%
- 17%
- 10%
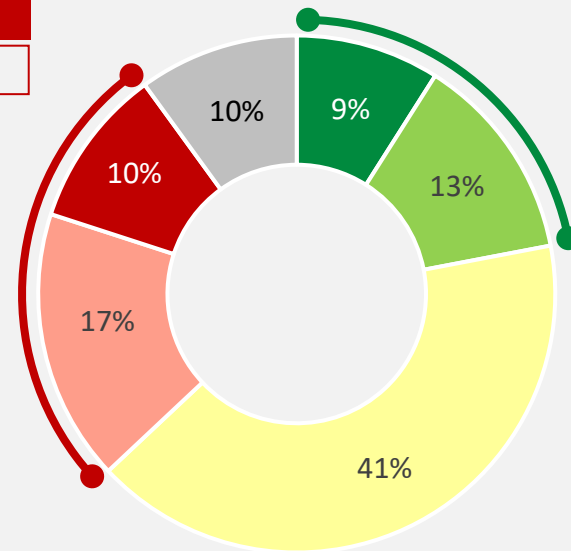
Legend:
- ■ 5 - Completely appropriate
- ■ 4
- ■ 3
- ■ 2
- ■ 1 - Completely inappropriate
- ■ Don't know

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

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Appropriate Use of Personal Data by Market Research

Top 2 Box

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

Legend:
- 5 – Completely appropriate
- 4
- 3
- 2
- 1 – Completely inappropriate
- Don't Know

Those in South Korea and the US are slightly less likely to feel market research companies use their personal data appropriately vs. 2022.

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

■ 2024   ■ 2022

	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	24%	23%	17%	13%	30%	23%	36%	23%
2022	26%	22%	17%	19%	30%	30%	37%	24%
(n 2024)	(3,506)	(500)	(500)	(504)	(503)	(500)	(499)	(500)
(n 2022)	(3,559)	(502)	(500)	(503)	(507)	(498)	(500)	(549)
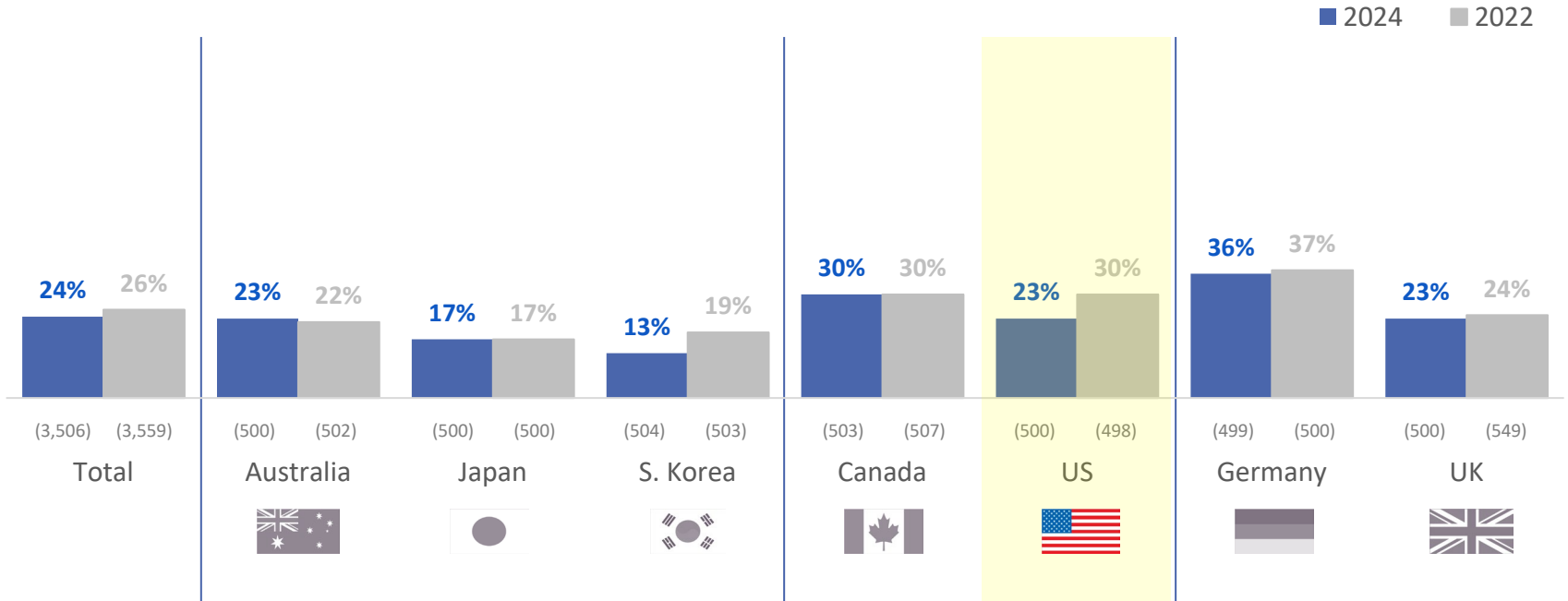
Market research companies continue to face high levels of concern over data protection in the US.

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US

Concern that Market Research Securely Protects Personal Data

Bottom 2 Box: Not Concerned

2024: 14%

2022: 15%

Top 2 Box: Concerned

2024: 52%

2022: 49%

4% 6%

10%

22%

28%

30%
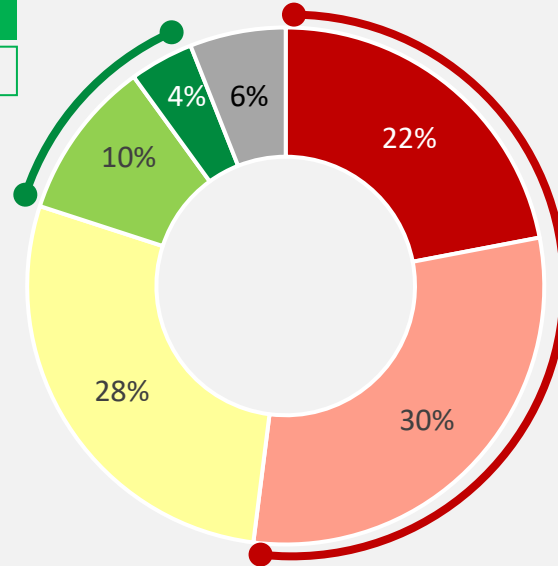
- 5 - Completely concerned
- 4
- 3
- 2
- 1 - Not at all concerned
- Don't know

In the US, concern in this regard is above the global average.

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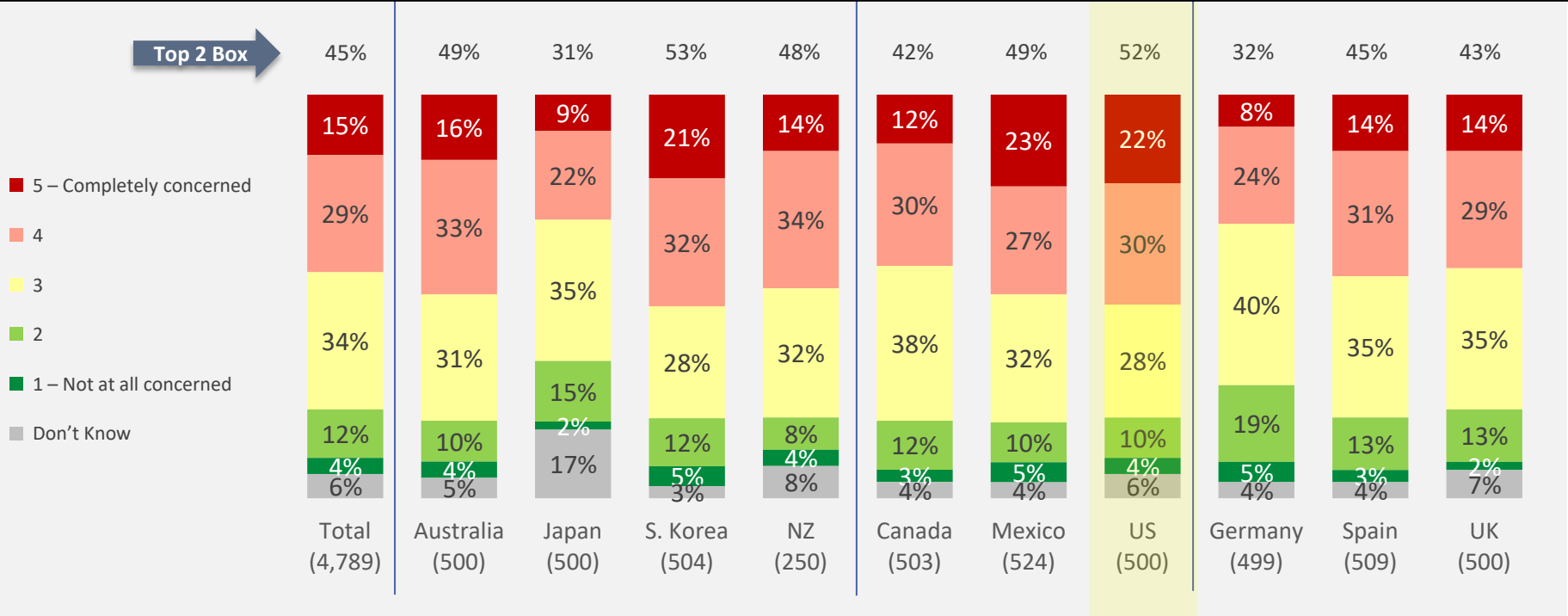
	Total (4,789)	Australia (500)	Japan (500)	S. Korea (504)	NZ (250)	Canada (503)	Mexico (524)	US (500)	Germany (499)	Spain (509)	UK (500)
Top 2 Box	45%	49%	31%	53%	48%	42%	49%	52%	32%	45%	43%
5 – Completely concerned	15%	16%	9%	21%	14%	12%	23%	22%	8%	14%	14%
4	29%	33%	22%	32%	34%	30%	27%	30%	24%	31%	29%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

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

■ 2024 ■ 2022

	2024	2022
Total	43%	45%
Australia	49%	50%
Japan	31%	37%
S. Korea	53%	64%
Canada	42%	46%
US	52%	49%
Germany	32%	29%
UK	43%	43%

(3,506) (3,559) (500) (502) (500) (500) (504) (503) (503) (507) (500) (498) (499) (500) (500) (549)
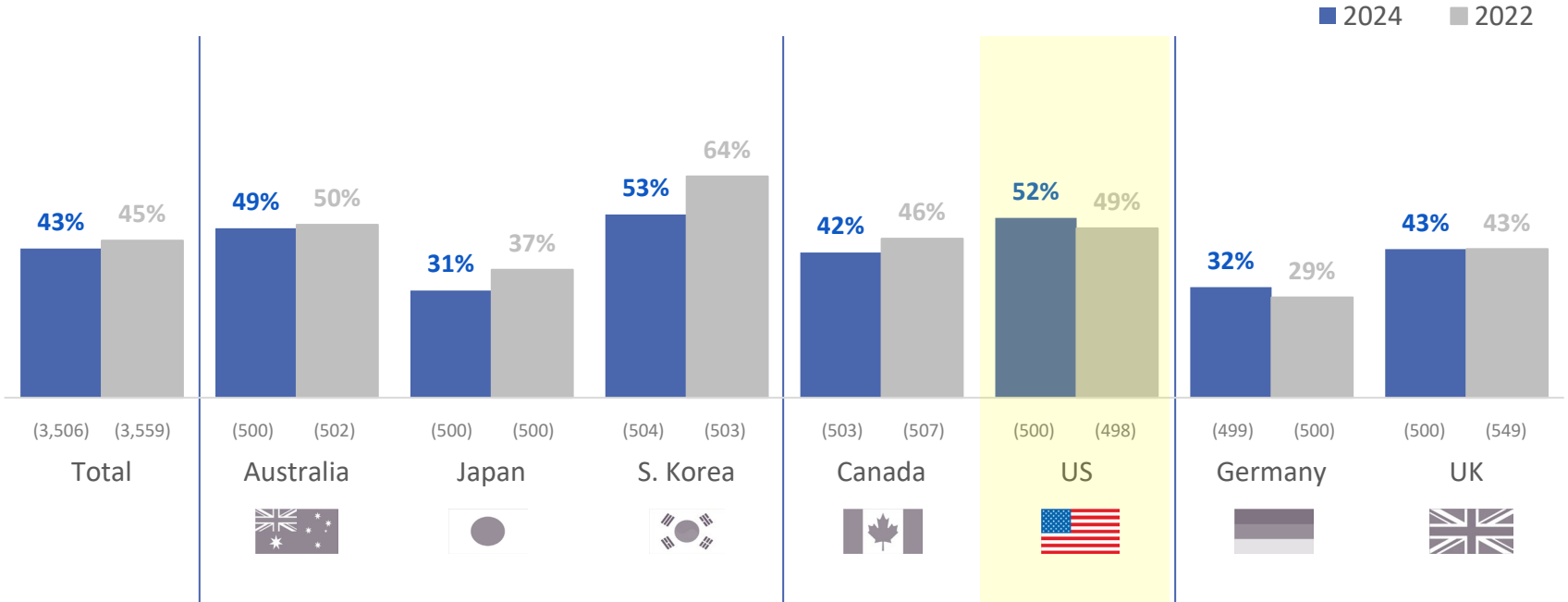
There is still a mixed level of knowledge regarding the collection, storage and usage of personal data by market research companies, and very few Americans feel completely informed.

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US

Degree Informed about Personal Data Collection, Storage & Use

Bottom 2 Box: Not Informed

| 2024: 35% |
| 2022: 31% |

Top 2 Box: Informed

| 2024: 27% |
| 2022: 35% |

- 14%
- 13%
- 7%
- 15%
- 20%
- 30%

Do you know where your data is?
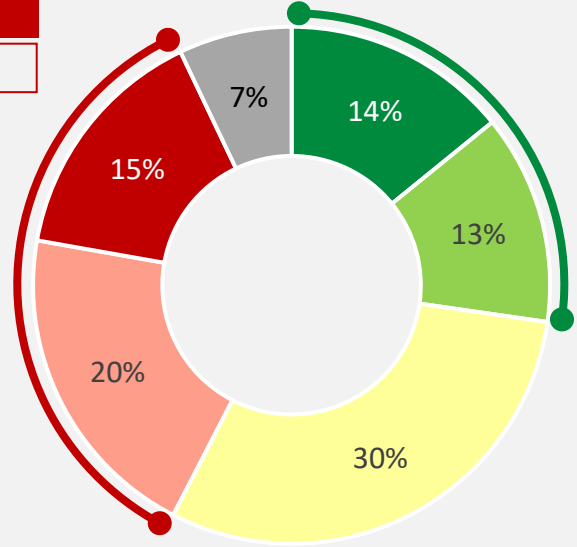
Legend:
- 5 - Completely informed
- 4
- 3
- 2
- 1 - Not at all informed
- Don't know

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

Degree Informed about Personal Data Collection, Storage & Use

Top 2 Box

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

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

■ 2024   ■ 2022

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

Data is based on comparable countries across waves.

**HOW AI
IMPACTS
THE LEVEL OF TRUST**
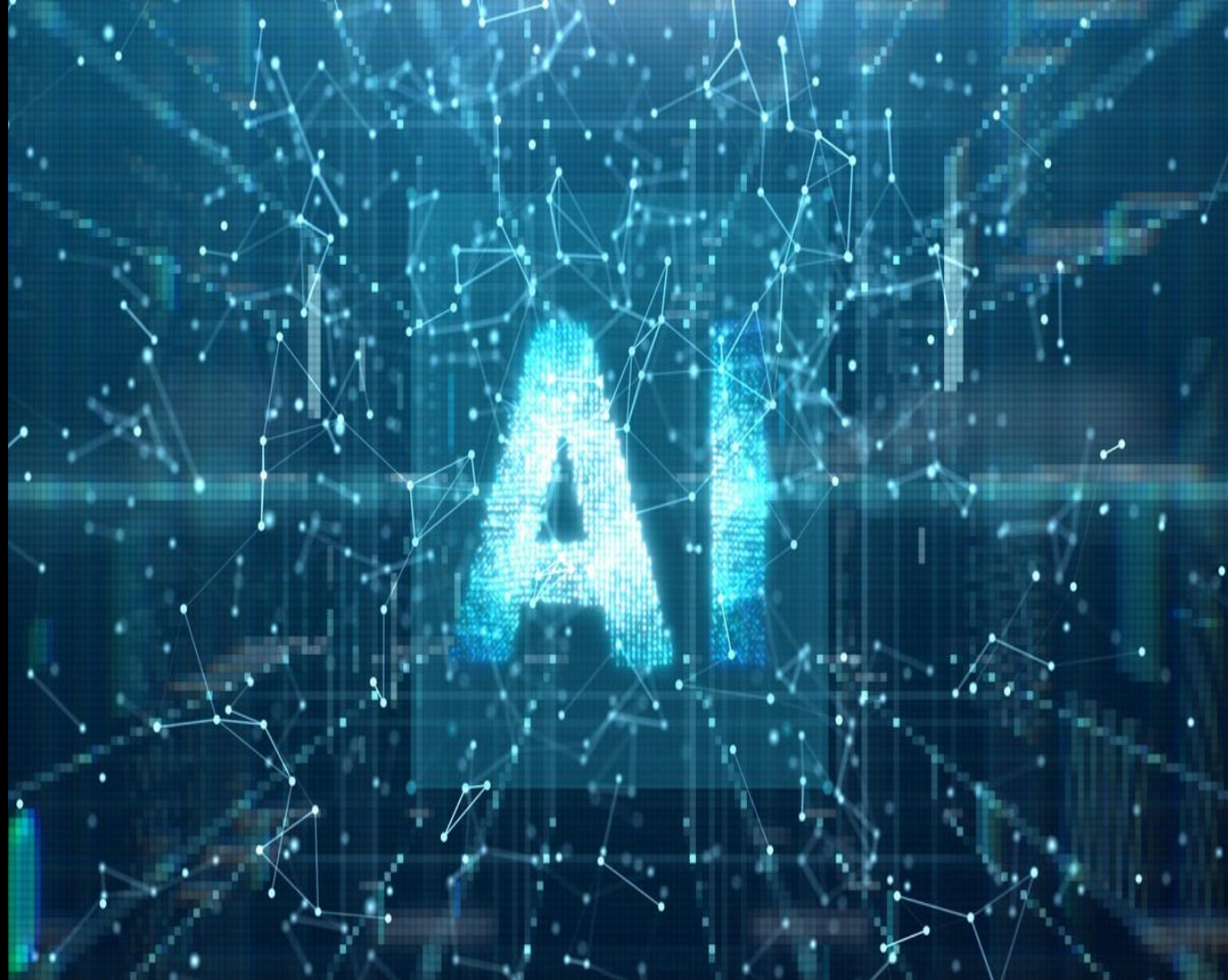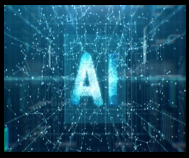
Incorporating AI into market research practices negatively impacts trust in market research companies.

Average Impact on Trust of Market Research Companies Using AI†

Net Trust Index

	Total	Australia	Japan	S. Korea	NZ	Canada	Mexico	US	Germany	Spain	UK
Net Trust Index	-37	-53	-22	-28	-58	-36	-17	-36	-42	-44	-38
Increase Trust	10%	4%	9%	9%	5%	9%	22%	13%	8%	8%	9%
No Impact	32%	27%	40%	44%	23%	36%	32%	26%	34%	30%	31%
Decrease Trust	47%	57%	31%	37%	63%	45%	39%	49%	50%	52%	47%
Don't Know	11%	12%	20%	10%	9%	10%	7%	12%	8%	10%	13%
Base	(7,803)	(500)	(1,000)	(1,002)	(250)	(1,000)	(1,051)	(500)	(1,000)	(1,000)	(500)

■ Increase Trust
☐ No Impact
■ Decrease Trust
■ Don't Know
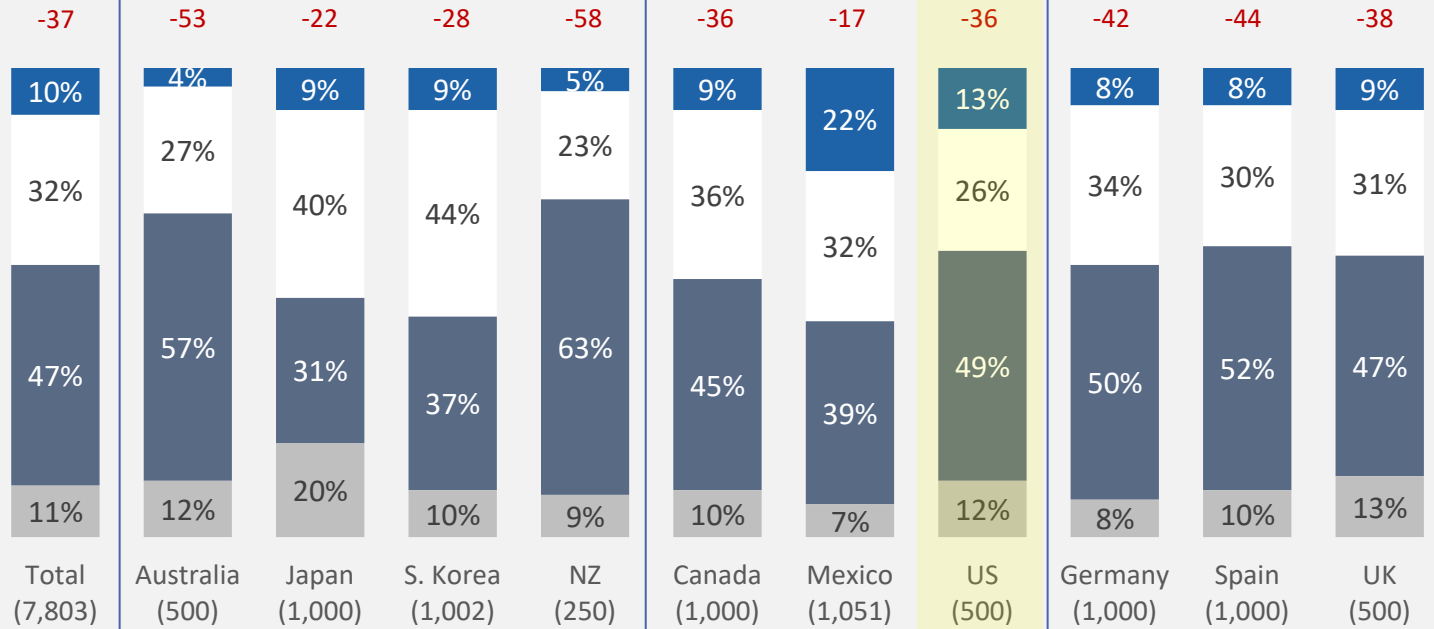
Net Trust Index = % Increase Trust − % Decrease Trust

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

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US

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

	Increase Trust	No Impact	Decrease Trust	Don't Know	Net Trust Index 2024
The use of AI programs for analyzing my responses in general	14%	33%	41%	12%	-27
The use of AI chatbots/avatars to interview me on general topics	12%	29%	48%	11%	-36
The fact that they may be using AI to collect and analyze my data	13%	24%	52%	11%	-39
The use of AI programs for analyzing any sensitive information I give in my responses	13%	23%	52%	12%	-39
The use of AI chatbots/avatars to interview me on sensitive topics	12%	22%	53%	13%	-41

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

Net Trust Index = % Increase Trust – % Decrease Trust

While net trust in companies touting AI benefits is divided in the US, it's above the global average.

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

Net Trust Index

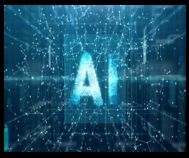|	Total (1,760)	Australia (503)	NZ (251)	US (506)	UK (500)
Net Trust Index	-16	-20	-25	0	-19
Increase Trust	17%	14%	13%	27%	16%
No Impact	36%	37%	34%	35%	36%
Decrease Trust	33%	34%	38%	27%	35%
Don't Know	14%	15%	15%	11%	13%

- Increase Trust
- No Impact
- Decrease Trust
- Don't Know
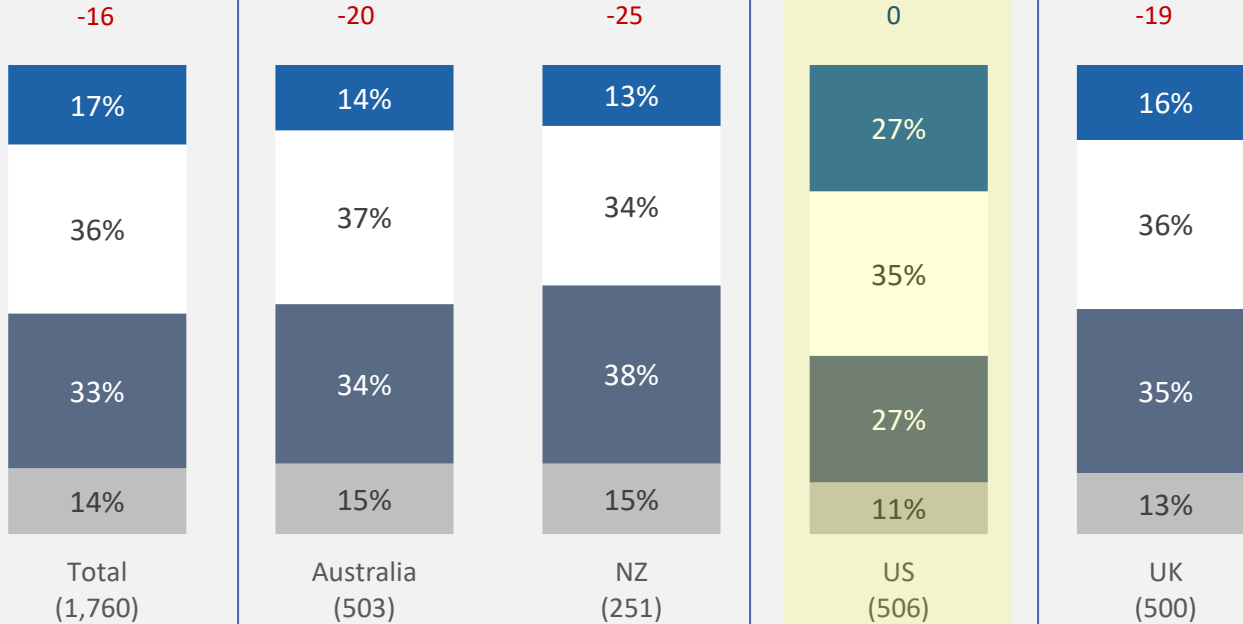
Net Trust Index = % Increase Trust − % Decrease Trust
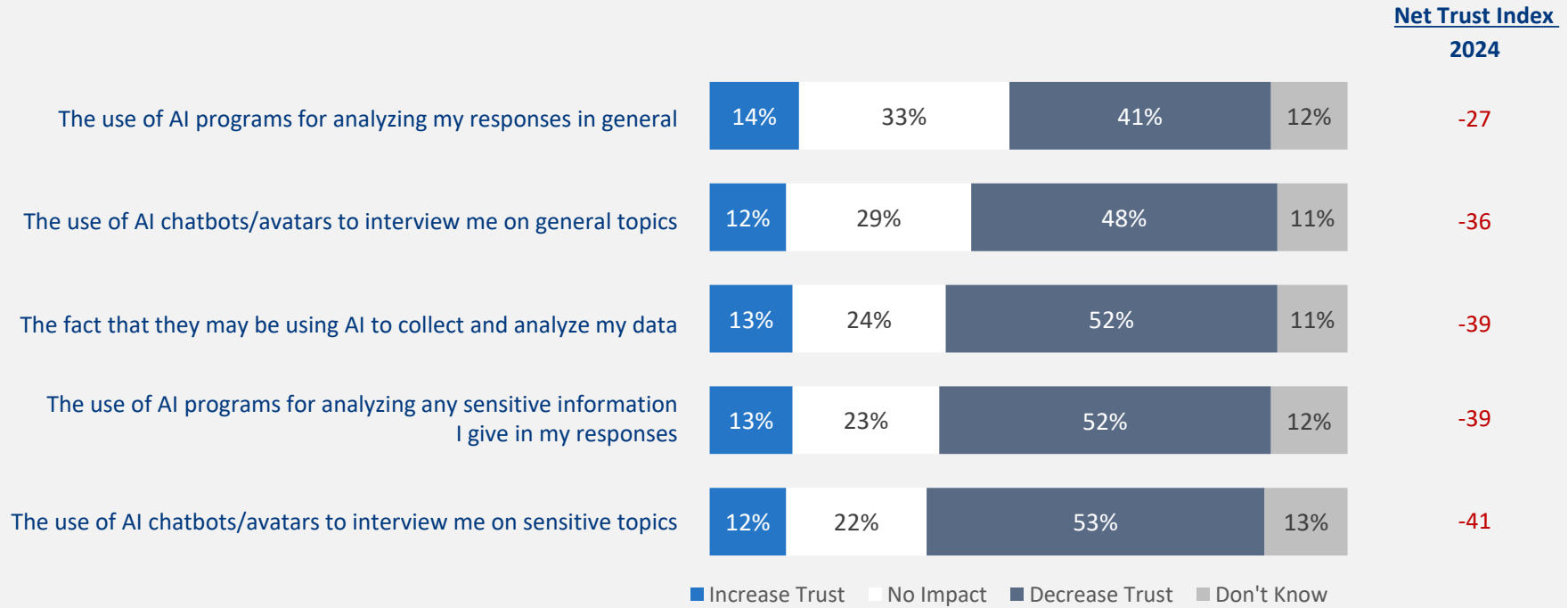
†Scores are an average across the 5 benefits by companies using AI

AI programs that aid efficiencies are trusted most in the US, whereas Americans are skeptical of AI chatbots or avatars during interviewing.

Levels of Trust in Benefits of Using AI Claimed by Companies

Net Trust Index

2024

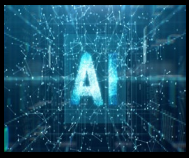|	Increase Trust	No Impact	Decrease Trust	Don't Know	Net Trust Index 2024
The use of AI programs for analysis helps us identify key themes more quickly so the human researchers can spend more time thinking about the actions companies should take based on participants answers	30%	35%	23%	12%	+7
Using AI helps us collect and analyze market data more quickly	28%	40%	23%	9%	+5
The use of AI programs for analyzing sensitive information people give in their responses reduces the risk of biased interpretation from human researchers	28%	34%	26%	12%	+2
Using AI chatbots or avatars in the online interview means that research participants feel more comfortable answering sensitive topics because they are not talking to a real person	25%	33%	33%	9%	-8
Using AI chatbots or avatars in the online interview makes the interview more engaging for participants	22%	35%	31%	12%	-9

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

Net Trust Index = % Increase Trust − % Decrease Trust
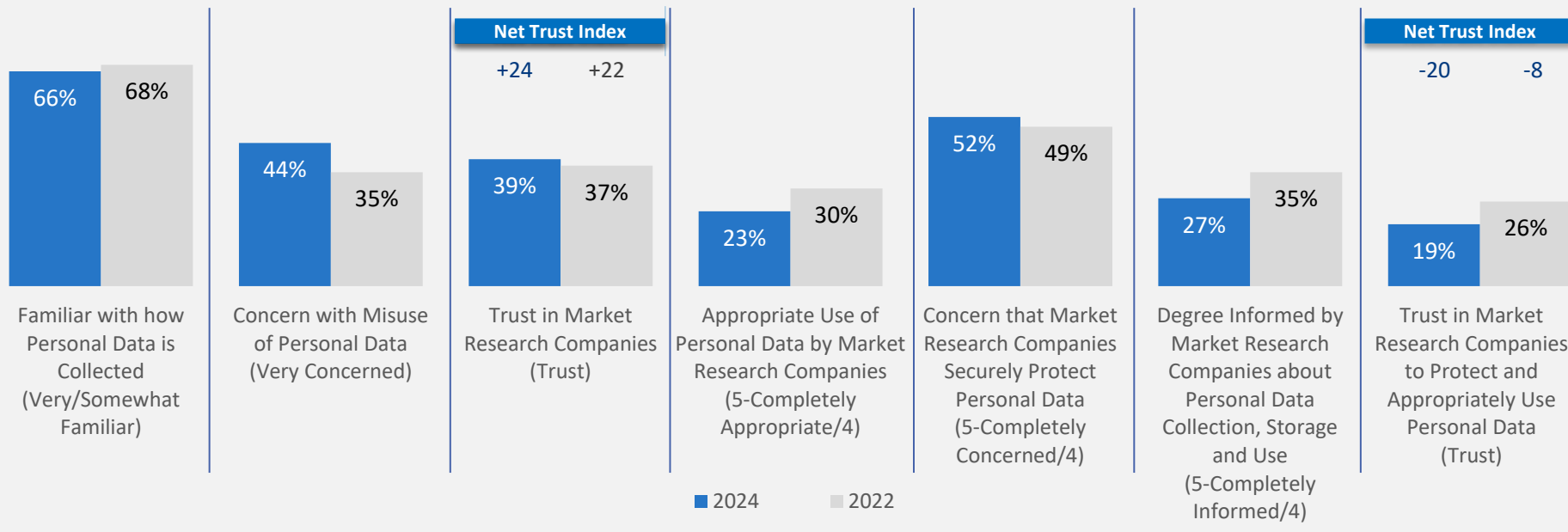
**TREND DATA
2024 VS. 2022**

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

GLOBAL RESEARCH BUSINESS NETWORK
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US

2024 vs. 2022 Comparison

Net Trust Index
+24   +22

Net Trust Index
-20   -8

	2024	2022
Familiar with how Personal Data is Collected (Very/Somewhat Familiar)	66%	68%
Concern with Misuse of Personal Data (Very Concerned)	44%	35%
Trust in Market Research Companies (Trust)	39%	37%
Appropriate Use of Personal Data by Market Research Companies (5-Completely Appropriate/4)	23%	30%
Concern that Market Research Companies Securely Protect Personal Data (5-Completely Concerned/4)	52%	49%
Degree Informed by Market Research Companies about Personal Data Collection, Storage and Use (5-Completely Informed/4)	27%	35%
Trust in Market Research Companies to Protect and Appropriately Use Personal Data (Trust)	19%	26%

■ 2024   ■ 2022

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