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Global Trust Survey 2024

Webinar

Focus on the UK

June 2024

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The Market Research
Society (MRS)

Zoe Rivlin
Opinium

Andrew Cannon
The Global Research
Business Network (GRBN)

- **INTRODUCTION**

- **OVERALL TRUST**

- **PERCIEVED BENEFIT**

- **USER EXPERIENCE**

- **TRUST WITH DATA**

- **TRUST AND AI**

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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

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UK

Overall Trust of Market Research Companies
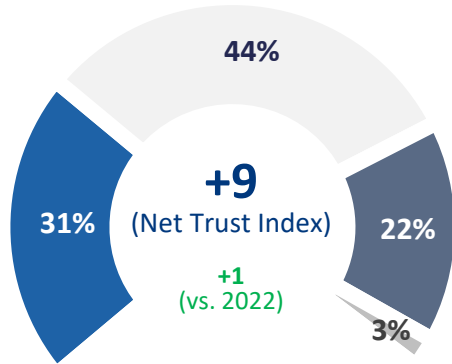
44%

31%

+9
(Net Trust Index)

+1
(vs. 2022)

22%

3%

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

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

40%

19%

-18
(Net Trust Index)

-7
(vs. 2022)

37%

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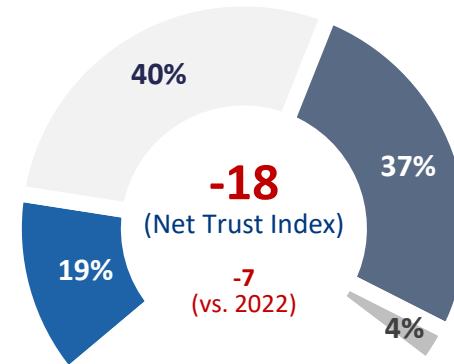
Net Trust Index = % Trust – % Do Not Trust

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

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

**LEVEL OF
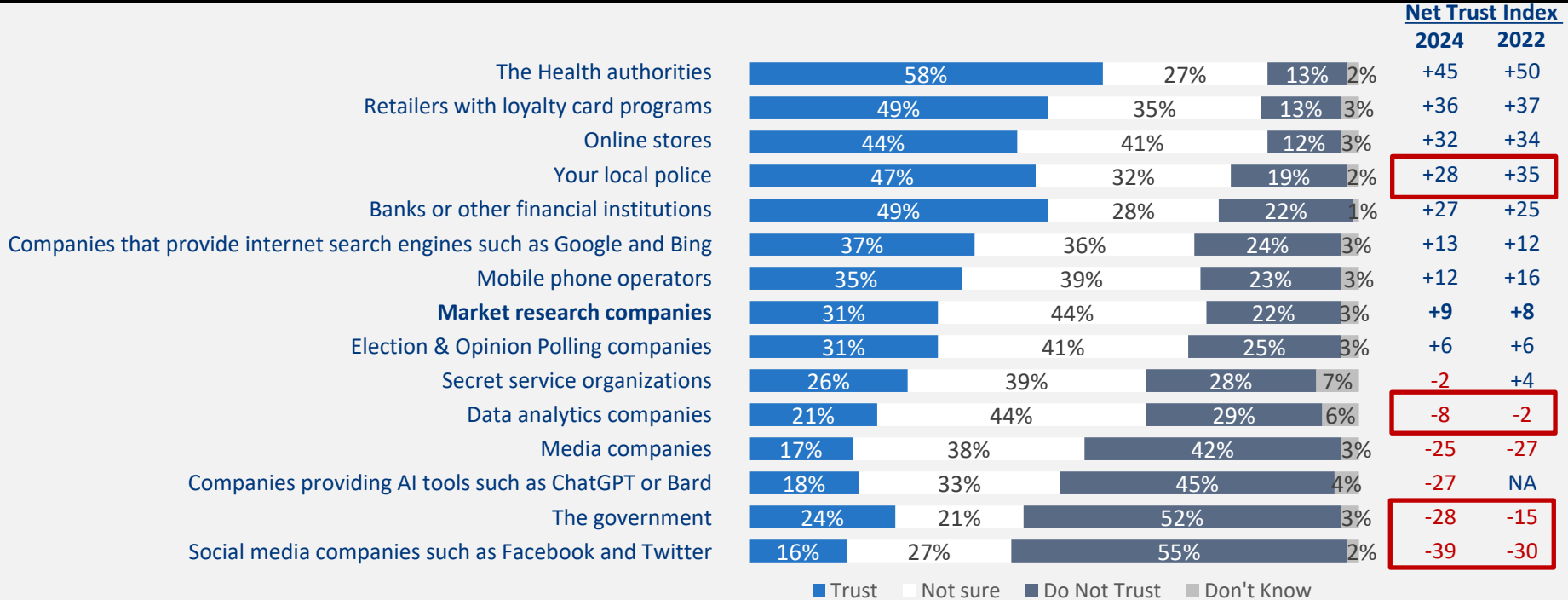OVERALL TRUST**

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.

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UK

Level of Trust by Organizations/Professionals

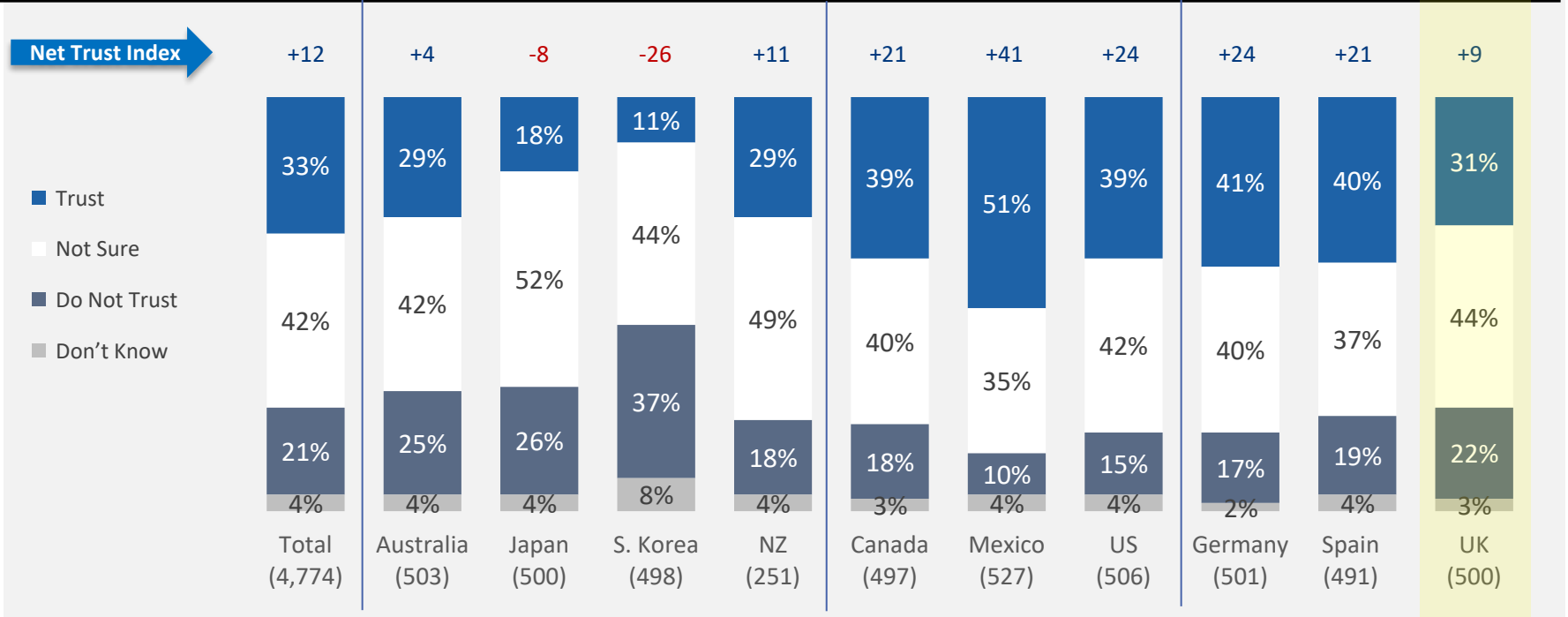|	Trust	Not sure	Do Not Trust	Don't Know	Net Trust Index 2024	Net Trust Index 2022
The Health authorities	58%	27%	13%	2%	+45	+50
Retailers with loyalty card programs	49%	35%	13%	3%	+36	+37
Online stores	44%	41%	12%	3%	+32	+34
Your local police	47%	32%	19%	2%	+28	+35
Banks or other financial institutions	49%	28%	22%	1%	+27	+25
Companies that provide internet search engines such as Google and Bing	37%	36%	24%	3%	+13	+12
Mobile phone operators	35%	39%	23%	3%	+12	+16
Market research companies	31%	44%	22%	3%	**+9**	**+8**
Election & Opinion Polling companies	31%	41%	25%	3%	+6	+6
Secret service organizations	26%	39%	28%	7%	-2	+4
Data analytics companies	21%	44%	29%	6%	-8	-2
Media companies	17%	38%	42%	3%	-25	-27
Companies providing AI tools such as ChatGPT or Bard	18%	33%	45%	4%	-27	NA
The government	24%	21%	52%	3%	-28	-15
Social media companies such as Facebook and Twitter	16%	27%	55%	2%	-39	-30

■ 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.
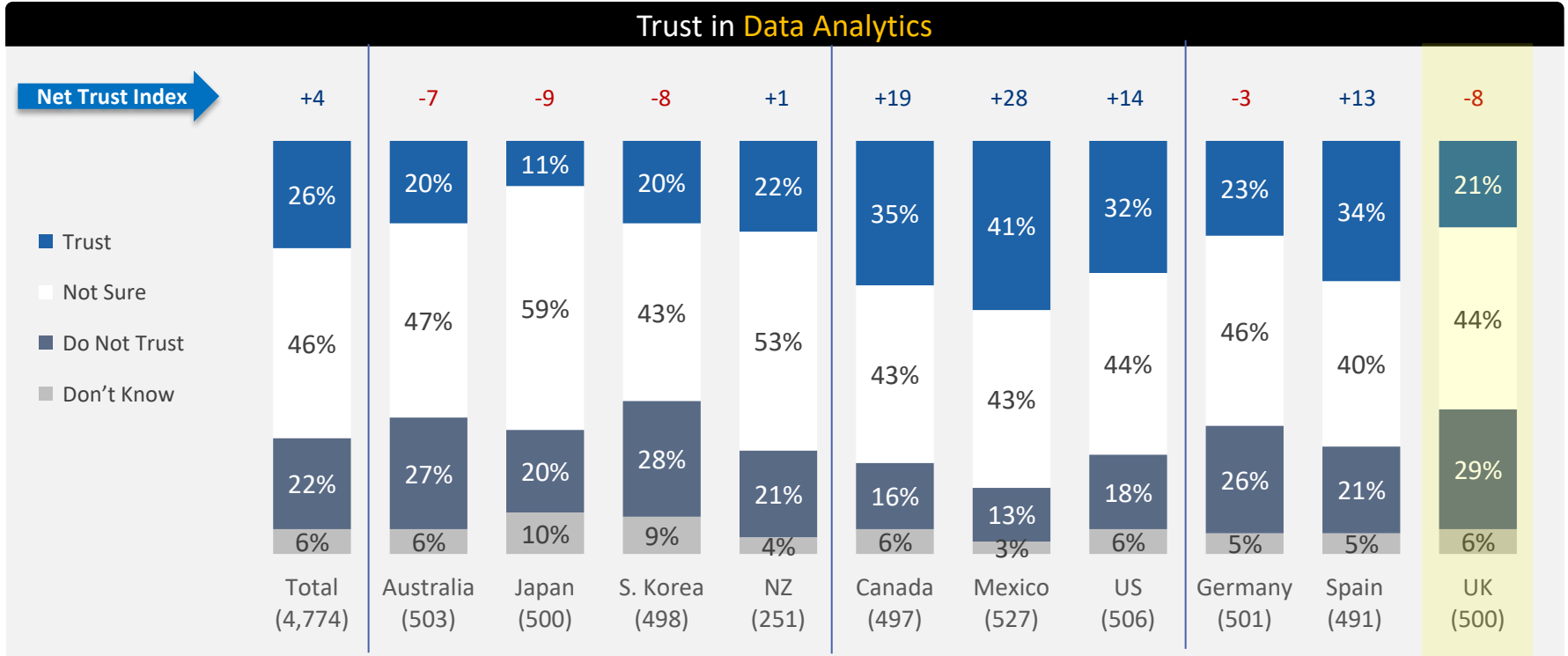
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Trust in Market Research

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

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.
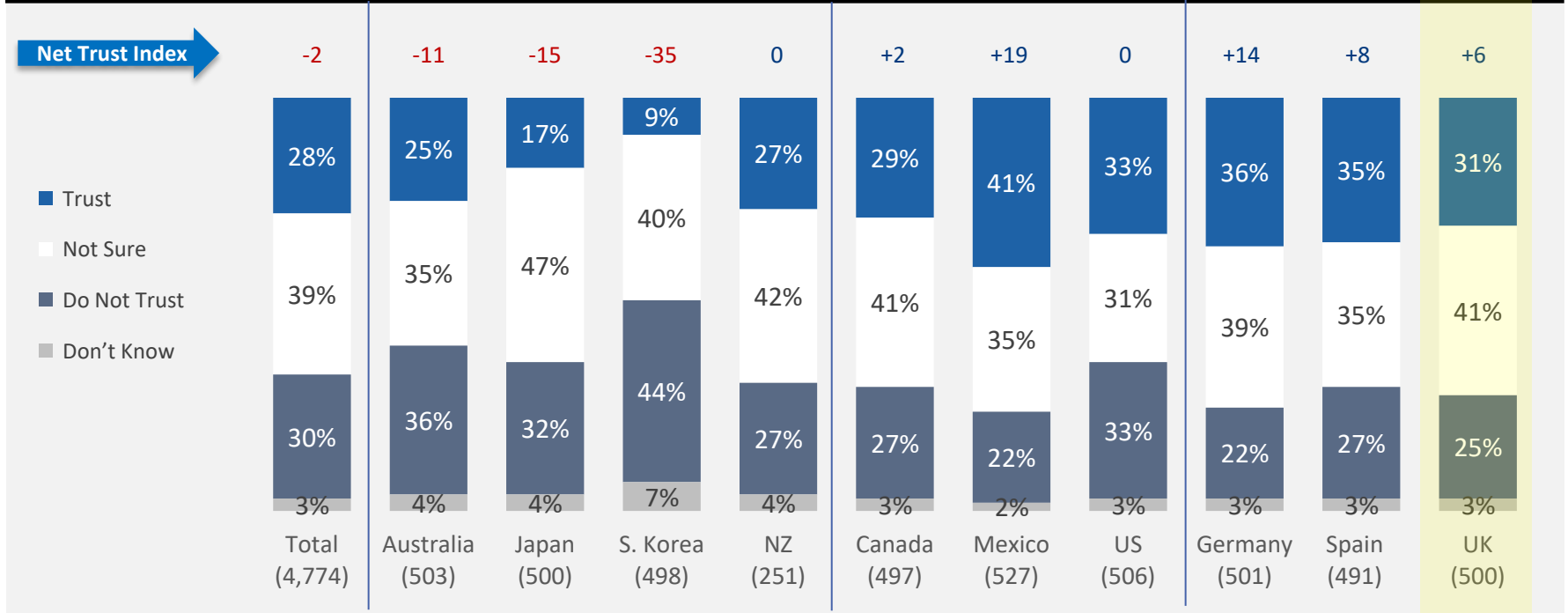
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Trust in Data Analytics

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)
Net Trust Index	+4	-7	-9	-8	+1	+19	+28	+14	-3	+13	-8
Trust	26%	20%	11%	20%	22%	35%	41%	32%	23%	34%	21%
Not Sure	46%	47%	59%	43%	53%	43%	43%	44%	46%	40%	44%
Do Not Trust	22%	27%	20%	28%	21%	16%	13%	18%	26%	21%	29%
Don't Know	6%	6%	10%	9%	4%	6%	3%	6%	5%	5%	6%

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

Net Trust Index = % Trust − % Do Not Trust

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

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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%

Net Trust Index = % Trust – % Do Not Trust

BELIEVABILITY THAT MARKET RESEARCH IS BENEFICIAL

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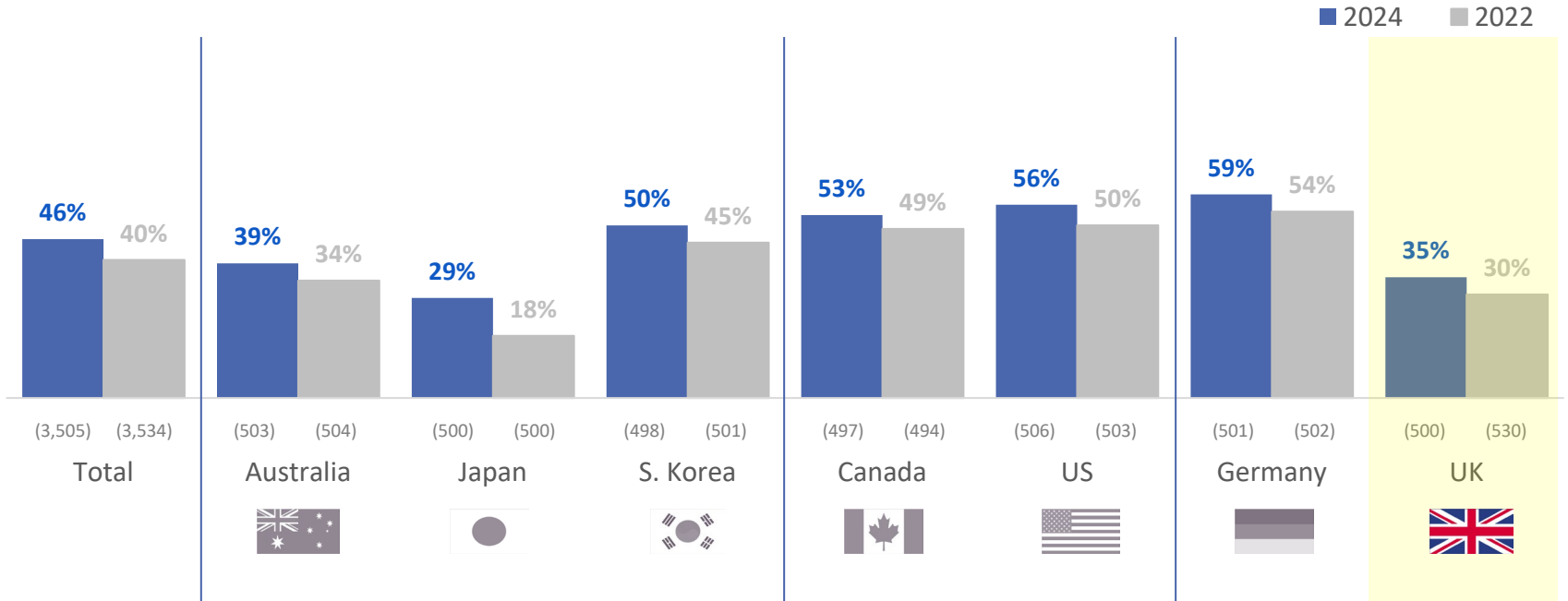
Globally, market research is deemed more beneficial to businesses vs. consumers.

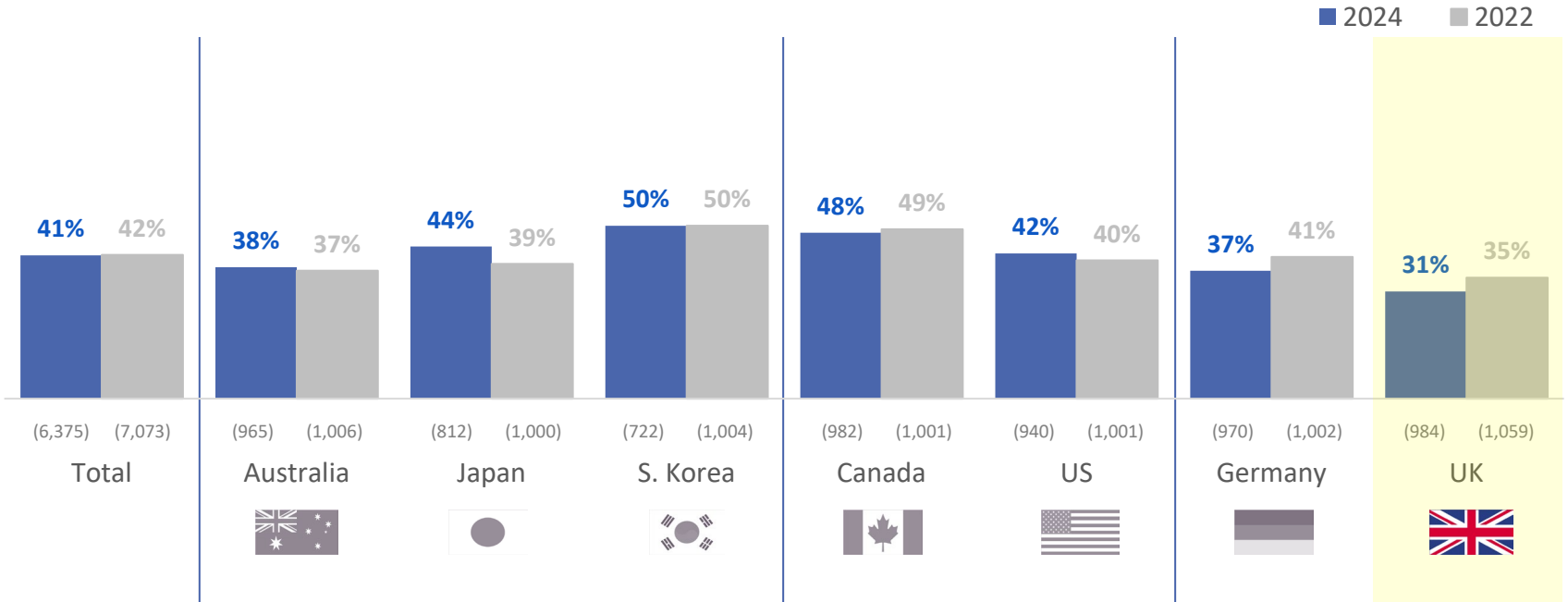**Extent Market Research is Perceived to be Beneficial to Consumers vs. Business (Top 2 Box)**

Consumers ■ Business

	Total (4,774)	Australia (503)	Japan (500)	S. Korea (498)	NZ (251)	Canada (497)	Mexico (527)	US (506)	Germany (501)	Spain (491)	UK (500)
Consumers	54%	50%	40%	55%	44%	58%	75%	56%	66%	59%	41%
Business	67%	69%	57%	45%	67%	73%	81%	68%	80%	72%	62%
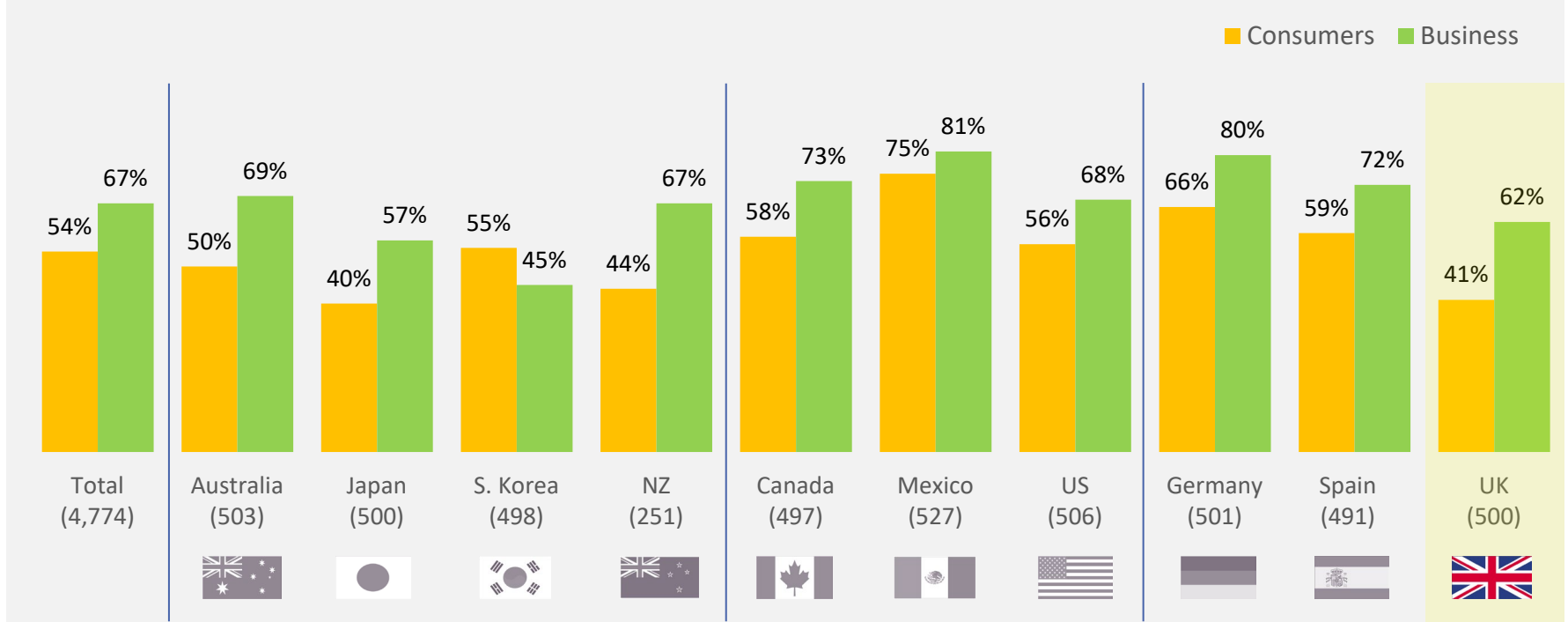
REACTIONS TO THE PARTICIPANT EXPERIENCE
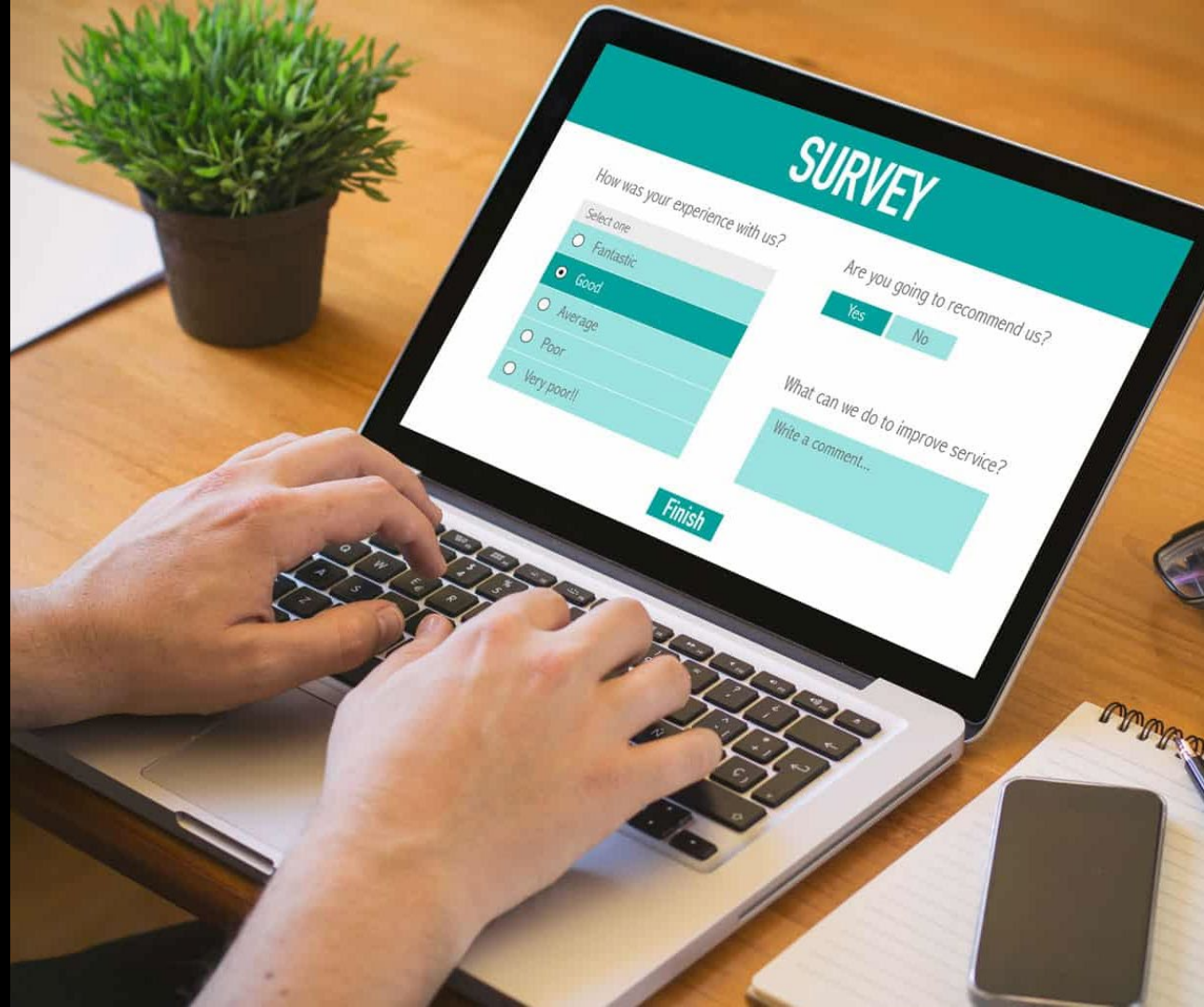
Survey length concerns are largely consistent with 2022.

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

■ 2024   ■ 2022

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

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

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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%
base (2024)	(6,375)	(965)	(812)	(722)	(982)	(940)	(970)	(984)
base (2022)	(7,073)	(1,006)	(1,000)	(1,004)	(1,001)	(1,001)	(1,002)	(1,059)
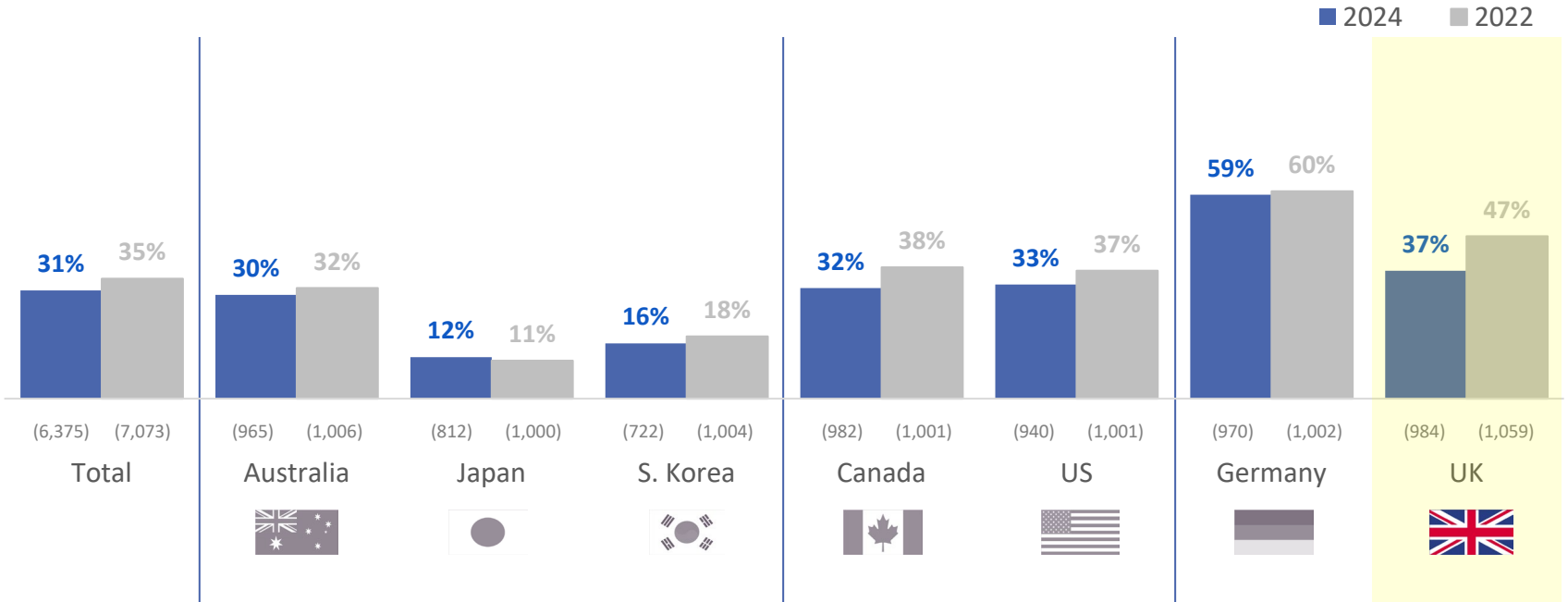
PERSONAL DATA USE

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%
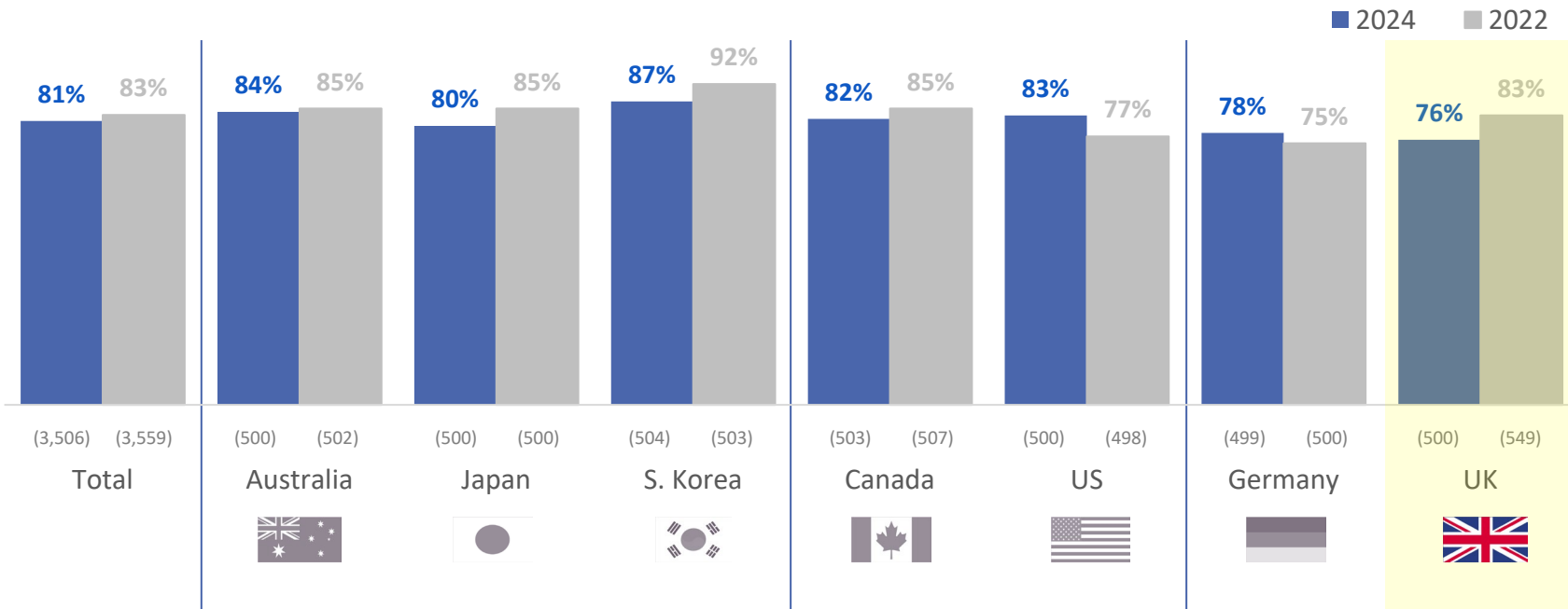
1%

2%

21%

26%

50%
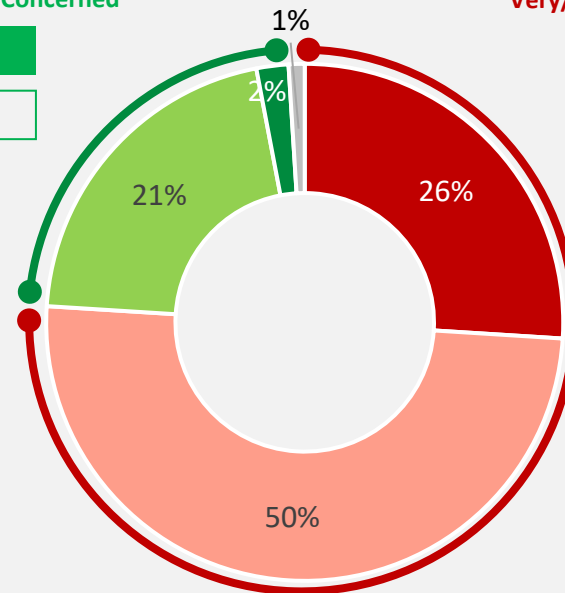
- Very concerned
- Somewhat concerned
- Not very concerned
- Not at all concerned
- Don't know/Prefer not to say

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

Legend: ■ 2024 ■ 2022

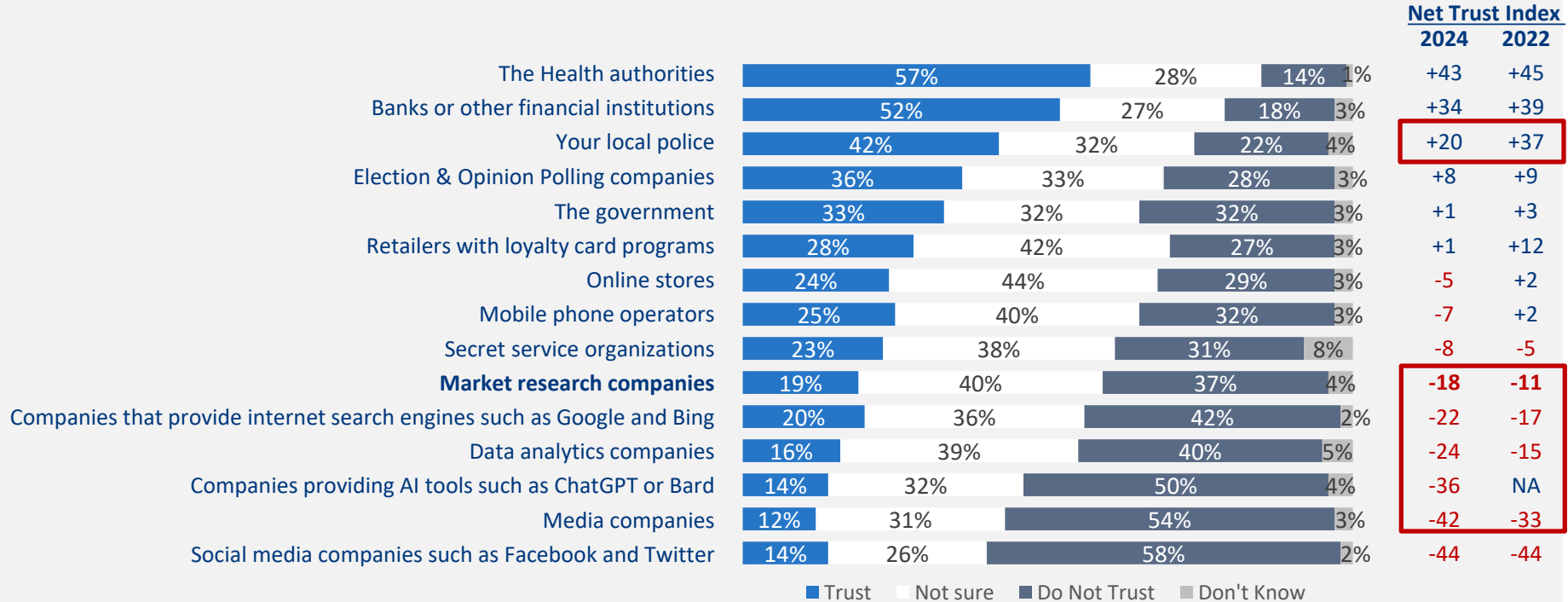|	Total	Australia	Japan	S. Korea	Canada	US	Germany	UK
2024	81%	84%	80%	87%	82%	83%	78%	76%
2022	83%	85%	85%	92%	85%	77%	75%	83%
n (2024)	(3,506)	(500)	(500)	(504)	(503)	(500)	(499)	(500)
n (2022)	(3,559)	(502)	(500)	(503)	(507)	(498)	(500)	(549)

Data is based on comparable countries across waves.

PROTECTION & USE OF PERSONAL DATA

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.

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UK

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
The Health authorities	57%	28%	14%	1%	+43	+45
Banks or other financial institutions	52%	27%	18%	3%	+34	+39
Your local police	42%	32%	22%	4%	+20	+37
Election & Opinion Polling companies	36%	33%	28%	3%	+8	+9
The government	33%	32%	32%	3%	+1	+3
Retailers with loyalty card programs	28%	42%	27%	3%	+1	+12
Online stores	24%	44%	29%	3%	-5	+2
Mobile phone operators	25%	40%	32%	3%	-7	+2
Secret service organizations	23%	38%	31%	8%	-8	-5
Market research companies	19%	40%	37%	4%	**-18**	**-11**
Companies that provide internet search engines such as Google and Bing	20%	36%	42%	2%	-22	-17
Data analytics companies	16%	39%	40%	5%	-24	-15
Companies providing AI tools such as ChatGPT or Bard	14%	32%	50%	4%	-36	NA
Media companies	12%	31%	54%	3%	-42	-33
Social media companies such as Facebook and Twitter	14%	26%	58%	2%	-44	-44

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

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.
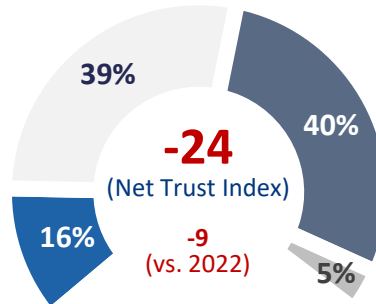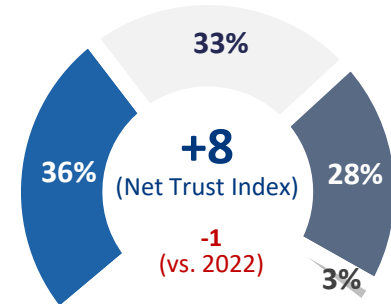
UK

Trust in Market Research
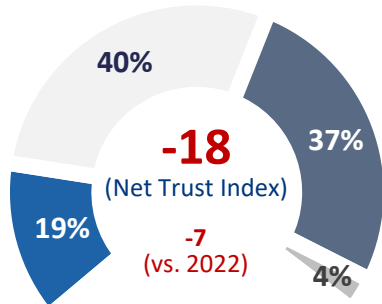
40%

37%

-18
(Net Trust Index)

19%

-7
(vs. 2022)

4%

Trust in Data Analytics

39%

40%

-24
(Net Trust Index)

16%

-9
(vs. 2022)

5%

Trust in Election & Opinion Polling

33%

36%

28%

+8
(Net Trust Index)

-1
(vs. 2022)

3%

■ 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

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

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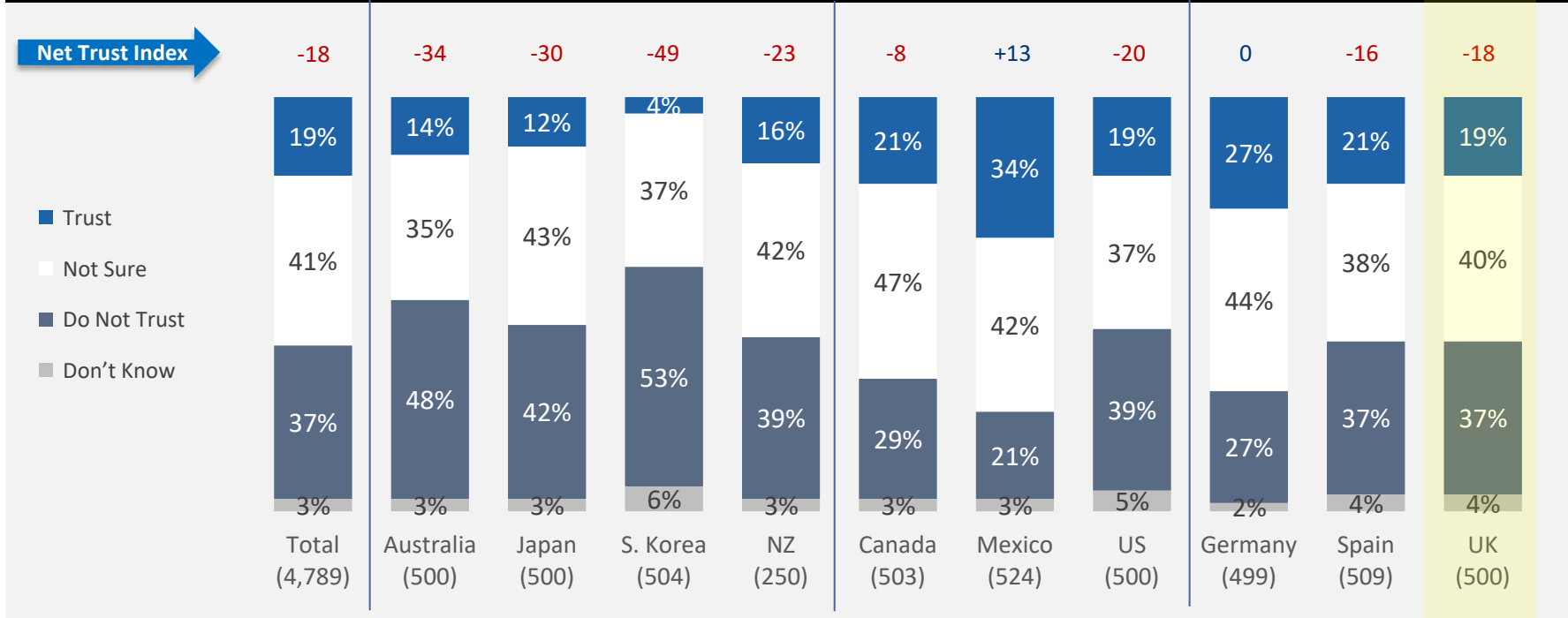
Net Trust Index = % Trust – % Do Not Trust

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

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

UK

Concern that Market Research Securely Protects Personal Data
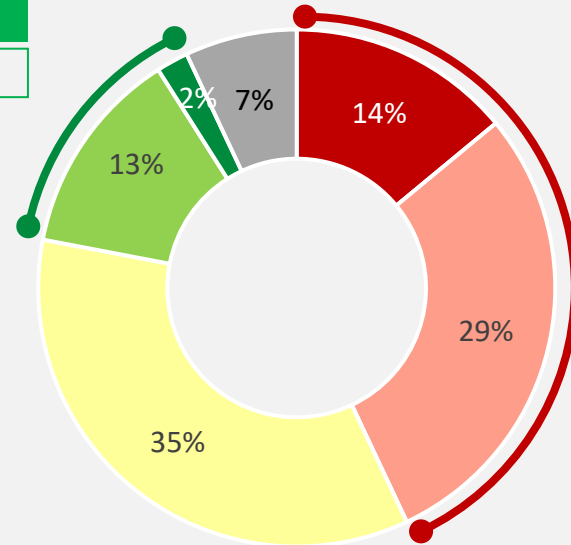
Bottom 2 Box: Not Concerned
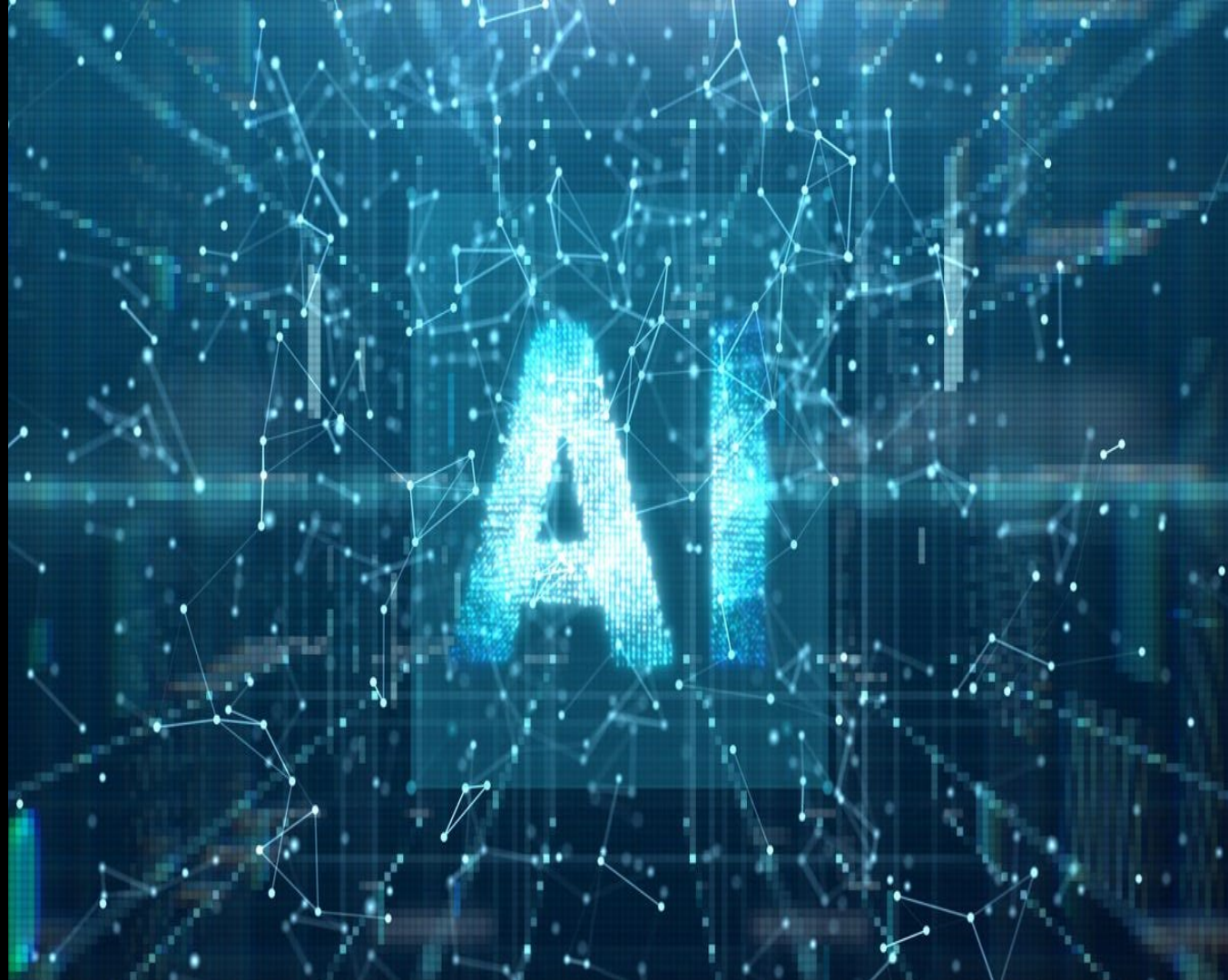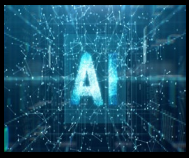
| 2024: 15% |
| 2022: 16% |

Top 2 Box: Concerned

| 2024: 43% |
| 2022: 43% |

2% | 7% | 14%
13% | | 29%
| 35% |

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

HOW AI IMPACTS THE LEVEL OF TRUST

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Average Impact on Trust of Market Research Companies Using AI†

Net Trust Index

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

Legend:
- Increase Trust
- No Impact
- Decrease Trust
- Don't Know
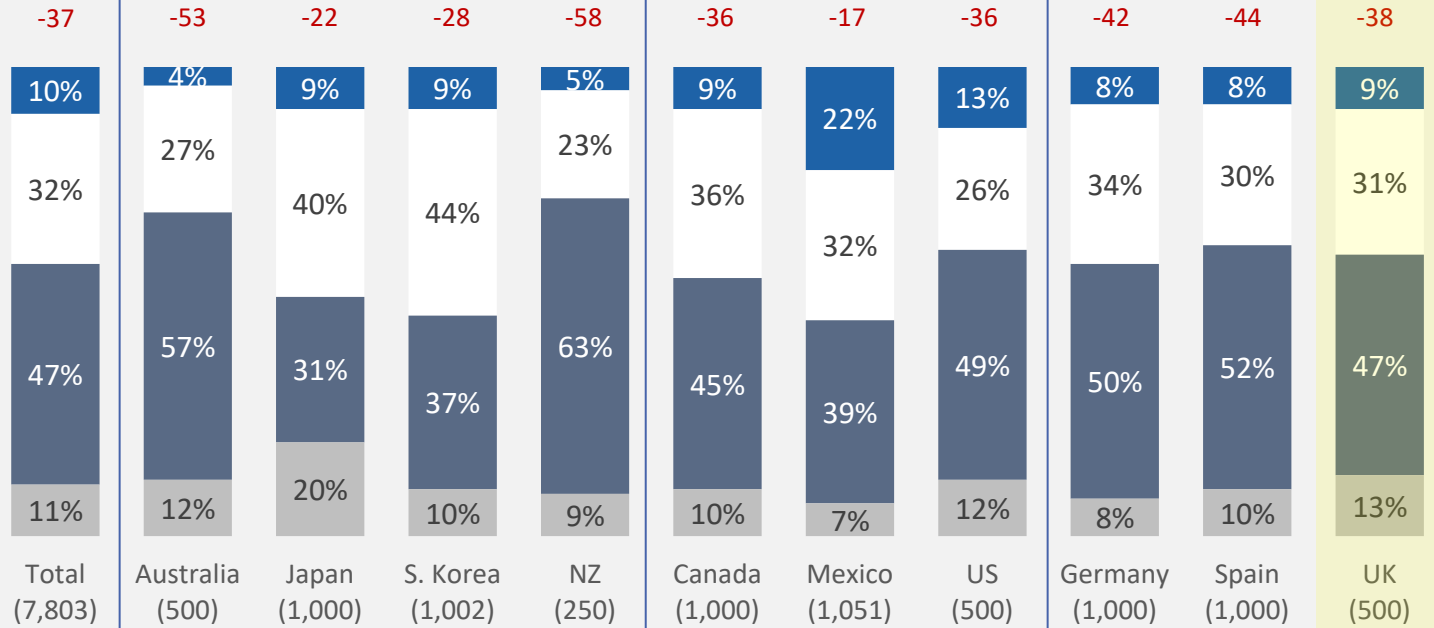
Net Trust Index = % Increase Trust − % Decrease Trust

†Scores are an average across the 5 uses of AI by market research companies
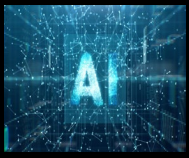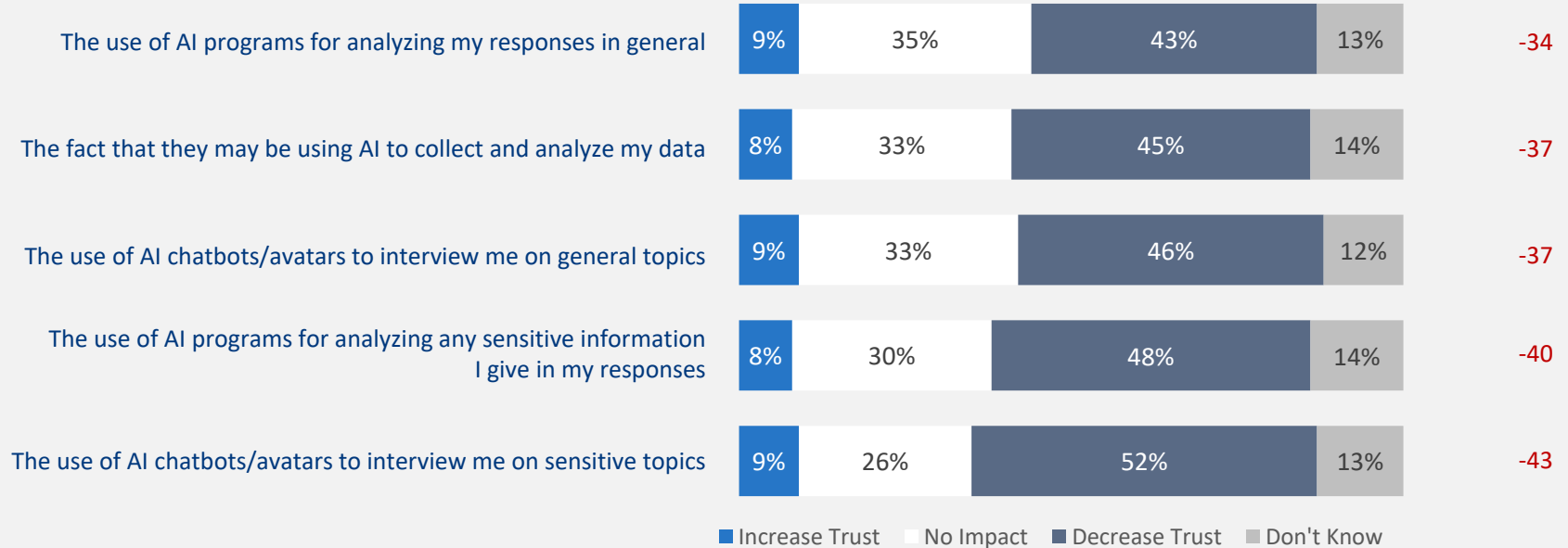
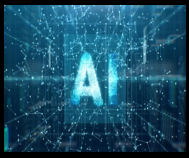Net trust is negative across all aspects of AI use by market research companies.

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

Net Trust Index 2024

	Increase Trust	No Impact	Decrease Trust	Don't Know	Net Trust Index 2024
The use of AI programs for analyzing my responses in general	9%	35%	43%	13%	-34
The fact that they may be using AI to collect and analyze my data	8%	33%	45%	14%	-37
The use of AI chatbots/avatars to interview me on general topics	9%	33%	46%	12%	-37
The use of AI programs for analyzing any sensitive information I give in my responses	8%	30%	48%	14%	-40
The use of AI chatbots/avatars to interview me on sensitive topics	9%	26%	52%	13%	-43

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

Net Trust Index = % Increase Trust − % Decrease Trust

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Levels of Trust in Benefits of Using AI Claimed by Companies

Net Trust Index 2024

Statement	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	19%	38%	30%	13%	-11
The use of AI programs for analyzing sensitive information people give in their responses reduces the risk of biased interpretation from human researchers	20%	32%	33%	15%	-13
Using AI helps us collect and analyze market data more quickly	12%	46%	31%	11%	-19
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	18%	33%	38%	11%	-20
Using AI chatbots or avatars in the online interview makes the interview more engaging for participants	13%	31%	42%	14%	-29

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

Net Trust Index = % Increase Trust – % Decrease Trust

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.

  - o Trust in **market research companies** held relatively steady and remains a net positive.

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

  - o 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.

  - o Positive perceived benefits to consumers remained largely consistent in the UK.

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

  - o This distrust is evident in most countries across most of the "insights space" (market research and data analytics companies).

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