Brand Trust Dimensions

Growing Stronger Brands Across Inclusive Audiences
What can brands do to strengthen trust across inclusive audiences?

Trust is critical for creating strong, enduring brands.
Our Questions

01→ Dimensions of Trust
What are the components of brand trust? How does brand trust vary by industry vertical and across inclusive audiences?

02→ Levers for Building Trust
What actions can brands take to strengthen trust across inclusive audiences?
The Scope

Who
Nationally representative sample
AAPI
Black
Hispanic / Latine
White
(Total N = 4,968)

What
32 brands tested across 4 industry verticals
Fast Casual Dining
Finance
Automotive
Over-the-Counter Medications

How
10 dimensions of brand trust
• Reliable
• Authentic in how they represent themselves
• Relatable
• Inclusive of all different types of people
• Easy to communicate with
• Ethical in how they run their business
• Community minded
• Respectable
• Innovative in how they run their business
• Socially conscious
Methodology

**Recruitment**
Participants recruited from representative online panel. Survey offered in English and Spanish. N = 4,968

**Trust Ratings**
Participants randomized to rate 2 brands they are familiar with from different verticals

**Brand Familiarity**
Participants rate familiarity of brands

**Actions**
Deep dive into actions brands can take to strengthen trust
Trust Foundations

The basics of brand trust
Trust has substantial impact on the bottom line across verticals

For example, for every point increase in trust, purchase intent increases for fast casual dining by an average of 26%.
No trust, no purchase

When a brand isn’t trusted, Purchase Intent drops precipitously.

Purchase Intent by Trust
Brand is ________

<table>
<thead>
<tr>
<th>Industry</th>
<th>Trustworthy</th>
<th>Not trustworthy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fast Casual Dining</td>
<td>77%</td>
<td>23%</td>
</tr>
<tr>
<td>Finance</td>
<td>86%</td>
<td>14%</td>
</tr>
<tr>
<td>Auto</td>
<td>87%</td>
<td>14%</td>
</tr>
<tr>
<td>OTC Medication</td>
<td>83%</td>
<td>17%</td>
</tr>
</tbody>
</table>

N: Fast Casual Dining = 1,718; Finance = 1,890; Auto = 1,909; Over the Counter = 2,009
Significant difference at ≥ 90% confidence between trustworthy and not trustworthy
Top 5 drivers of trust are ____

All dimensions have a meaningful impact on brand trust

Drivers of Trust
Modelled

Reliability, 11%

Respect, 9%

Ethical, 6%

Authenticity, 6%

Relatability, 5%

Innovative business practices, 3%
Easy to communicate, 3%
Community mindfulness, 2%
Inclusivity, 2%
Social consciousness, 2%

There’s an opportunity for brands to communicate any dimension of trust in advertising. However, business practices should align to ensure authenticity.
Brand trust plays a critical role in purchases across inclusive cohorts.

Trust is a particularly strong driver of purchase intent among AAPI.

Impact of Trust on Purchase Intent
Modelled, by race/ethnicity

- **Overall Audience**: +33%
- **AAPI**: +39%
- **Black**: +29%
- **Hispanic / Latine**: +29%
- **White**: +30%

N: AAPI = 905; Black = 998; Hispanic / Latine = 2,139; White = 1,448
All modeled values are statistically significant at ≥ 90% confidence.
Brands should take a nuanced approach to building trust based on audience

Drivers of Trust by Race/Ethnicity

<table>
<thead>
<tr>
<th>Overall Audience</th>
<th>AAPI</th>
<th>Black</th>
<th>Hispanic / Latine</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliable</td>
<td>11%</td>
<td>11%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>Respectable</td>
<td>9%</td>
<td>9%</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Ethical in how they run their business</td>
<td>6%</td>
<td>4%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Authentic on how they represent themselves</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Relatable</td>
<td>5%</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Innovative in how they run their business</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Easy to communicate with</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Community minded</td>
<td>2%</td>
<td>4%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Inclusivity</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Socially conscious</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>

N: AAPI = 906; Black = 998; Hispanic / Latine = 2,139; White = 1,448
All modeled values are statistically significant at ≥ 90% confidence
Consistency in inclusiveness:
The simple act of being inclusive drives trust across all audiences.

Inclusive of all different types of people*

* Significant driver of trust across all inclusive audiences. All modeled values are statistically significant at ≥ 90% confidence.
How is each vertical doing on brand trust?
Building brand trust is not a one-size-fits-all

**Top Drivers of Trust by Vertical - Modelled**

- **Auto**
  - Reliability reigns supreme
- **Fast Casual Dining**
  - Ethical business practices are an especially powerful trust builder compared to other verticals
- **Finance**
  - Finance brands aiming to drive trust have a wide range of options for doing so
- **OTC Medication**
  - Authenticity is twice as important compared to other verticals

<table>
<thead>
<tr>
<th></th>
<th>Auto</th>
<th>Fast Casual Dining</th>
<th>Finance</th>
<th>OTC Medication</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliable</td>
<td>13%</td>
<td>11%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Respectable</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Ethical</td>
<td>6%</td>
<td>9%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Authentic</td>
<td>5%</td>
<td>3%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Relatable</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

N: Fast Casual Dining = 1,718; Finance = 1,890; Auto = 1,909; Over the Counter = 2,009
All modeled values are statistically significant at ± 90% confidence
Brand Trust Ratings

How does each vertical currently rate against each driver of brand trust?

A guide to understanding the quadrant analysis

★ ★ ★
Auto

Auto brands should focus on reliability, but also explore opportunities to convey ethical practices.

Trust Drivers & Ratings

DON’T LOSE STEAM
As the most powerful trust builder, reliability should be the underpinning of marketing efforts.

ETHICAL PRACTICES
Auto brands should strengthen perceptions of ethical business practices.
Auto

For Black audiences, auto brands should explore community focused initiatives

Trust Drivers

Inclusive Spotlight

Trust Drivers, Modeled Impact

- Overall Audience
- Black

BLACK
#1 driver of brand trust for Black audiences

Community Minded

- 4%
- 12%

Ethical

- 6%
- 11%

N: Auto, Black = 506
All modeled values are statistically significant at a 90% confidence
Auto

Auto brands should be cognizant of past issues with authenticity in the eyes of Black and Hispanic/Latine customers.

Top Reasons For Brand Distrust - % Selected

- AAPI
- Black
- Hispanic/Latine
- White

- Be Authentic
  - Black
  - Hispanic/Latine

- Connect More
  - All audiences

- No connection with me
- Inauthentic
- Mishandled controversies
- Hard to find reviews
- Neglects customers

N: Auto = 1,909
Q: Let's explore trustworthiness a little more. You hinted that [brand] isn't quite trustworthy. Now, let's dig into what exactly gives you that sense of distrust in the brand. [Brand]...
Fast Casual Dining

Fast casual brands need improvement in communication of ethical business practices

Trust Drivers & Ratings

IN NEED OF ATTENTION
While ethical practices are a top trust driver, fast casual brands aren’t rating well

N: Fast Casual Dining = 1,718
All modeled values are statistically significant at ≥ 90% confidence
Fast Casual Dining

For Hispanic / Latine audiences, restaurant brands should consider language preferences

Trust Driver

Inclusive Spotlight

HISPANIC / Latine
Consider language preference:
Easy communication was a uniquely strong driver of trust for Hispanic / Latine audiences. Specifically, in the top 3 strongest drivers, unlike any other inclusive cohort

Trust Driver – Easy to Communicate
Modelled Impact

Overall Audience

Hispanic / Latine

N: Fast Casual Dining, Hispanic / Latine = 766
All modeled values are statistically significant at a 90% confidence
**Fast Casual Dining**

Beyond lack of personal connections, past controversies and customer service are eroding trust for fast casual brands, so should also be a focus.

### Brand Distrust

<table>
<thead>
<tr>
<th>Reason</th>
<th>Index (100)</th>
</tr>
</thead>
<tbody>
<tr>
<td>No connection with me</td>
<td>+31</td>
</tr>
<tr>
<td>Mishandled controversies</td>
<td>+13</td>
</tr>
<tr>
<td>Poor customer service</td>
<td>+13</td>
</tr>
<tr>
<td>Neglects customers</td>
<td>+4</td>
</tr>
<tr>
<td>Inauthentic</td>
<td>+1</td>
</tr>
<tr>
<td>Insincere with community</td>
<td></td>
</tr>
<tr>
<td>Hard to find reviews</td>
<td></td>
</tr>
<tr>
<td>No diversity in ads</td>
<td></td>
</tr>
</tbody>
</table>

N: Fast Casual Dining = 1,718
Q: Let's explore trustworthiness a little more. You hinted that [brand] isn't quite trustworthy. Now, let's dig into what exactly gives you that sense of distrust in the brand. [Brand]...

---

**Indexed to avg.**

---
Finance

Finance has room for improvement in a wide range of trust builders

Trust Drivers & Ratings

[ + ] HIGHER PERFORMANCE RATING

[ - ] LOWER PERFORMANCE RATING

[ - ] WEAKEST DRIVER

[ + ] STRONGEST DRIVER

Inclusive

Community Minded

Socially Conscious

Easy to communicate

Innovative

Ethical

Authentic

Relatable

NEEDS IMPROVEMENT
These actions have the potential to significantly improve brand trust, but finance brands aren’t rating well

N: Finance = 1,880
All modeled values are statistically significant at ≥ 90% confidence
Finance
Increased focus on being socially conscious would build trust with Black audiences

Trust Driver

Inclusive Spotlight

Trust Driver - Socially Conscious
Modelled Impact

BLACK
Being socially conscious is a uniquely strong driver of trust for Black audiences

Overall Audience
3%

Black
6%

N: Finance, Black = 466
All modelled values are statistically significant at ≥90% confidence
### Finance

Finance brands should also focus on illustrating care for its customers, authenticity and handling controversies better.

### Brand Distrust

Reported reasons for distrust for Finance

<table>
<thead>
<tr>
<th>Reason</th>
<th>Index to Avg (100)</th>
</tr>
</thead>
<tbody>
<tr>
<td>No connection with me</td>
<td>+28</td>
</tr>
<tr>
<td>Neglects customers</td>
<td>+7</td>
</tr>
<tr>
<td>Mishandled controversies</td>
<td>+5</td>
</tr>
<tr>
<td>Inauthentic</td>
<td>+4</td>
</tr>
<tr>
<td>No diversity in ads</td>
<td></td>
</tr>
<tr>
<td>Hard to find reviews</td>
<td></td>
</tr>
<tr>
<td>Poor customer service</td>
<td></td>
</tr>
<tr>
<td>Insincere with community</td>
<td></td>
</tr>
</tbody>
</table>
OTC Brands

OTC brands should focus on building relatability through inclusivity.

Trust Drivers & Ratings

[+] WEAKEST DRIVER

[+] STRONGEST DRIVER

[ + ] HIGHER PERFORMANCE RATING

[ - ] LOWER PERFORMANCE RATING

Relatable
Inclusive
Ethical
Socially Conscious
Community Minded
Easy to Communicate
Innovative

Reliable
Respectable
Authentic

MISSED OPPORTUNITIES
In addition to ethical practices, OTC brands have an opportunity to build trust through inclusivity and relatability.

N: Over the Counter = 2,009
All modeled values are statistically significant at a 90% confidence

25
OTC Brands

OTC brands should focus on building authenticity with AAPI consumers

Authenticity Ratings

68% Black
66% White
66% Hispanic / Latine
58% AAPI

Most room for improvement

N: AAPI = 448; Black = 530; Hispanic / Latine = 1,270; White = 806
Q: Give [brand] a rating for each of the characteristics listed. I’d say [brand] is...
Actions for building stronger brands
Making an effort to connect is table stakes
Brands can combat distrust across all inclusive audience segments through meaningful marketing outreach

Reasons for brand distrust
% Selected

<table>
<thead>
<tr>
<th>Reason</th>
<th>% Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>No connection with me</td>
<td>38%</td>
</tr>
<tr>
<td>Mishandled controversies</td>
<td>26%</td>
</tr>
<tr>
<td>Inauthentic</td>
<td>26%</td>
</tr>
<tr>
<td>Hard to find reviews</td>
<td>26%</td>
</tr>
<tr>
<td>No diversity in ads</td>
<td>26%</td>
</tr>
<tr>
<td>Poor customer service</td>
<td>26%</td>
</tr>
<tr>
<td>Insincere with community</td>
<td>26%</td>
</tr>
<tr>
<td>Neglects customers</td>
<td>26%</td>
</tr>
<tr>
<td>Unclear sales messaging</td>
<td>26%</td>
</tr>
</tbody>
</table>

Forging personal connections is significantly more important for brand trust than good customer service.

N: 2,442
Q: Let’s explore trustworthiness a little more. You hinted that [brand] isn’t quite trustworthy. Now, let’s dig into what exactly gives you that sense of distrust in the brand. [Brand]...
Brands have been successful at connecting with consumers in a variety of ways, notably social media and good content alignment

Good content alignment has made greater strides in connecting with consumers than free product (via loyalty rewards)

<table>
<thead>
<tr>
<th>Successful modes for connecting with consumers</th>
<th>Average</th>
<th>AAPI</th>
<th>Black</th>
<th>Hispanic / Latine</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Among those who mentioned the brand was connecting with them</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social media</td>
<td>41%</td>
<td>45%</td>
<td>36%</td>
<td>43%</td>
<td>37%</td>
</tr>
<tr>
<td>Run ads next to/in content that is relevant to me</td>
<td>34%</td>
<td>31%</td>
<td>35%</td>
<td>39%</td>
<td>29%</td>
</tr>
<tr>
<td>Run ads next to/in content that fits with the mood/theme of the ad</td>
<td>33%</td>
<td>29%</td>
<td>38%</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>The content they generate (e.g., TV shows, short form online content, etc.)</td>
<td>33%</td>
<td>31%</td>
<td>40%</td>
<td>32%</td>
<td>30%</td>
</tr>
<tr>
<td>Personalized recommendations when I interact with them</td>
<td>30%</td>
<td>34%</td>
<td>33%</td>
<td>30%</td>
<td>26%</td>
</tr>
<tr>
<td>Loyalty reward programs</td>
<td>30%</td>
<td>29%</td>
<td>29%</td>
<td>29%</td>
<td>35%</td>
</tr>
<tr>
<td>The storytelling in their ads</td>
<td>29%</td>
<td>27%</td>
<td>30%</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td>Run ads next to/in content that represents me &amp; the world around me</td>
<td>28%</td>
<td>22%</td>
<td>33%</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>Influencers I follow</td>
<td>20%</td>
<td>22%</td>
<td>23%</td>
<td>18%</td>
<td>18%</td>
</tr>
</tbody>
</table>

N: AAPI = 120; Black = 151; Hispanic / Latine = 267; White = 152
Q: You mentioned [Brand] is making moves to connect with you. What’s the best mode they’ve used to make that connection happen?
Q: Alright, so we’ve identified what [Brand] seem trustworthy. Can you tell us which of these traits [Brand] truly excels at?
Thoughtful advertising practices present an immense opportunity to build brand trust.

Brands can build trust with majority of people through their advertising practices.

Most effective actions for building trust - Net Score (% selected)

- Pay attention to content ads run next to 33%
- Inclusive ads 31%
- Sharing online content created by customers 30%
- Personalized customer experiences 30%
- Strong creative stories in ads 27%
- Ad messages that reflect my experiences 24%

76% Advertising Practices
To build trust, brands should leverage the power of video, especially on the biggest screen in the home.

Preferred channels of engagement

- TV ads: 48%
- Social media ads: 33%
- Their website: 25%
- Product placements: 25%
- Online video ads: 23%
- Influencer ads or recommendations: 15%
- Ads in search results: 14%
- Online banner ads: 11%

N: 4,968
Q: You mentioned —— doesn’t seem to make an effort to connect with you. Can you suggest any specific ways they could effectively engage with you to communicate their message and build trust? Select all that apply.
Media responsibility is a driving force behind establishing consumer trust.

Most effective advertising practices for driving brand trust - Net Score (%)

- Reputable and safe to watch: 48%
- Supports diverse communities and creators: 45%
- Diverse and representative of the world around me: 38%

N: 4,968
Q: When it comes to establishing your trust with brands, what do you think are the most effective ways for brands to deliver their messages through advertising?
Summary
# Implications

<table>
<thead>
<tr>
<th>Thoughtful, Ongoing Communication</th>
<th>People expect to feel seen by brands and when they do not, perceived lack of effort breeds distrust. Making efforts to connect with individuals through consistent and thoughtful communication is recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Video Advertising Serves As A Gateway To Brand Trust</td>
<td>There’s an opportunity for brands to communicate any dimension of trust in advertising – particularly video. However, business practices should always align to ensure authenticity</td>
</tr>
<tr>
<td>Embrace Responsible Media Practices</td>
<td>For brands, media responsibility isn’t just a component, it’s the driving force behind establishing consumer trust. Brands should:</td>
</tr>
<tr>
<td>Ensure Credible and Safe Media Environments:</td>
<td>Nearly half of consumers believe that seeing ads in a reputable and secure context is essential for building trust</td>
</tr>
<tr>
<td>Support Diversity in Communities and Creators:</td>
<td>Nearly as many consumers feel that trust is built when brands actively support diverse voices and creators</td>
</tr>
<tr>
<td>Reflect a Diverse World:</td>
<td>A substantial segment of the audience values ads that are set against a backdrop of diverse and representative content</td>
</tr>
</tbody>
</table>
Vertical Action Items

Auto
- Continue focusing on reliability messaging
- Ensure you aren’t just “talking the talk” when it comes to ethical business practices
- Consider community initiatives for Black audiences

Fast Casual Dining
- Evaluate their ethical business practices and convey improvements
- Consider having a clear accountability plan for handling unexpected controversies
- Explore communication difficulties with Hispanic / Latine audiences

Finance
- Given a wide range of trust building actions are possible for finance, brands should take this as an opportunity to differentiate
- Focus on social consciousness when communicating with Black audiences

OTC Medications
- Authenticity, authenticity, authenticity – it’s an important driver of trust and has the most room for growth among AAPI audiences
- Focus efforts on building trust through inclusivity and relatability
<table>
<thead>
<tr>
<th>Dimension of Trust</th>
<th>Actions to Consider</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliable</td>
<td>Brand quality, on-time delivery, customer support, accurate product information</td>
</tr>
<tr>
<td>Respectable</td>
<td>Consistent messaging, accurate product information</td>
</tr>
<tr>
<td>Ethical Business Practices</td>
<td>Clear messaging for brand value, customer support, community support</td>
</tr>
<tr>
<td>Authenticity</td>
<td>Consistent messaging. Message and product alignment. Accurate product information</td>
</tr>
<tr>
<td>Relatable</td>
<td>Outreach to your audience where they are. Transparent, honest messaging</td>
</tr>
<tr>
<td>Community Minded</td>
<td>Investments in local communities</td>
</tr>
<tr>
<td>Innovative</td>
<td>Anticipate customer needs, targeting messaging to consumer needs</td>
</tr>
<tr>
<td>Inclusive</td>
<td>Inclusive and diverse marketing, messaging across all outreach platforms</td>
</tr>
<tr>
<td>Easy To Communicate With</td>
<td>Open channels of communication, feedback channels</td>
</tr>
<tr>
<td>Socially Conscious</td>
<td>Ensure sustainable business practices</td>
</tr>
</tbody>
</table>
Thank You