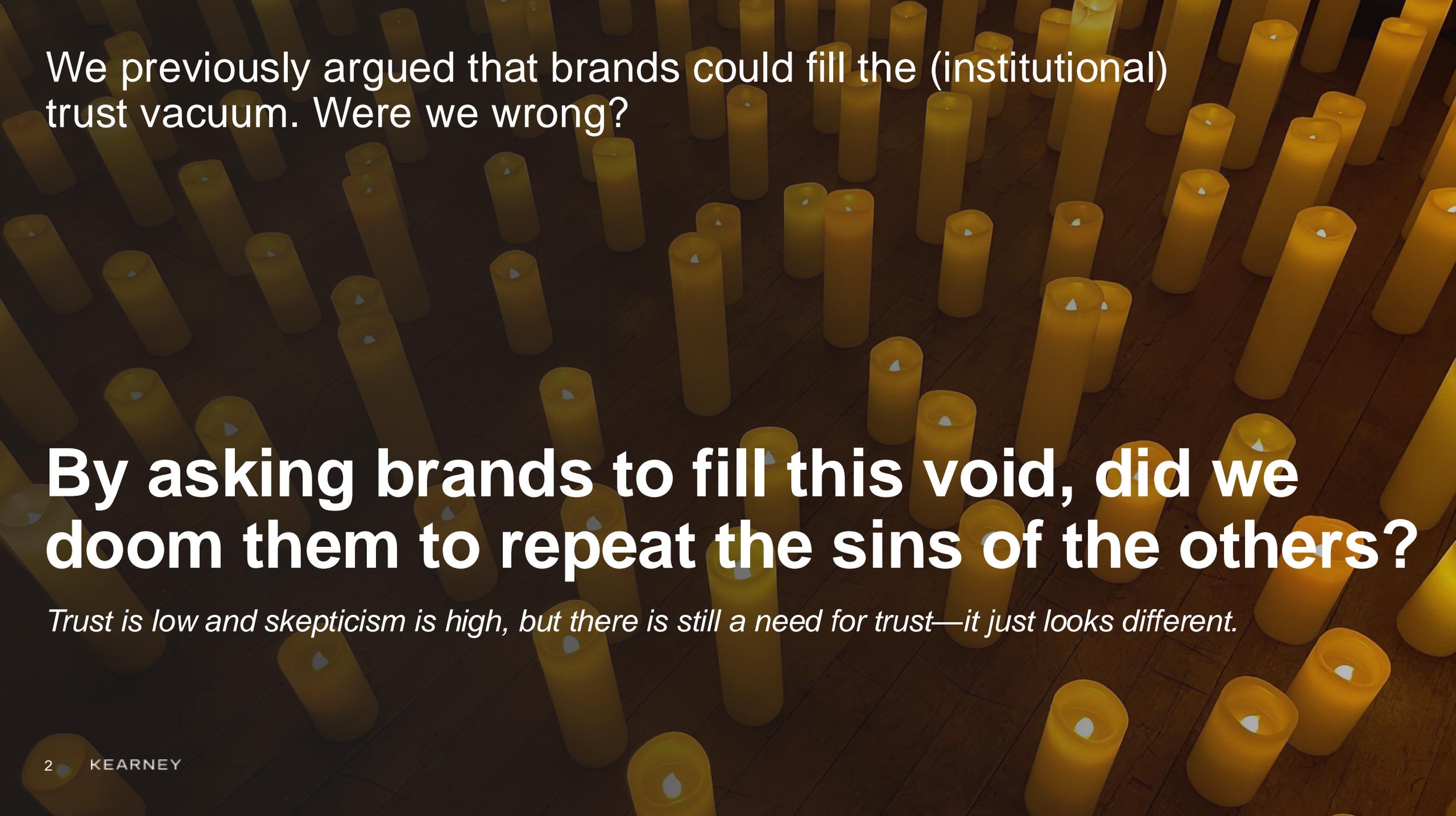


Don't go breaking my heart

Building trust in an age of skepticism

Kearney Consumer Institute
Q1 2025

KEARNEY



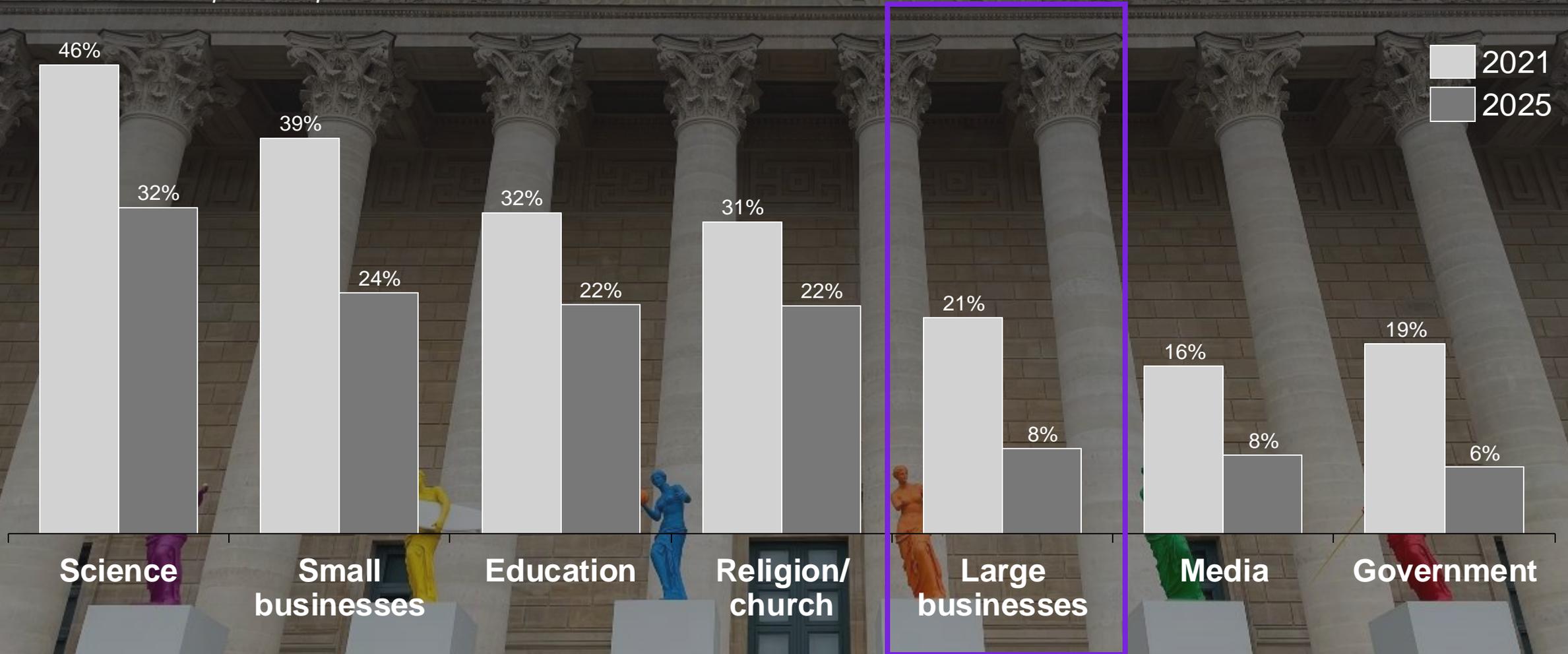
We previously argued that brands could fill the (institutional) trust vacuum. Were we wrong?

By asking brands to fill this void, did we doom them to repeat the sins of the others?

Trust is low and skepticism is high, but there is still a need for trust—it just looks different.

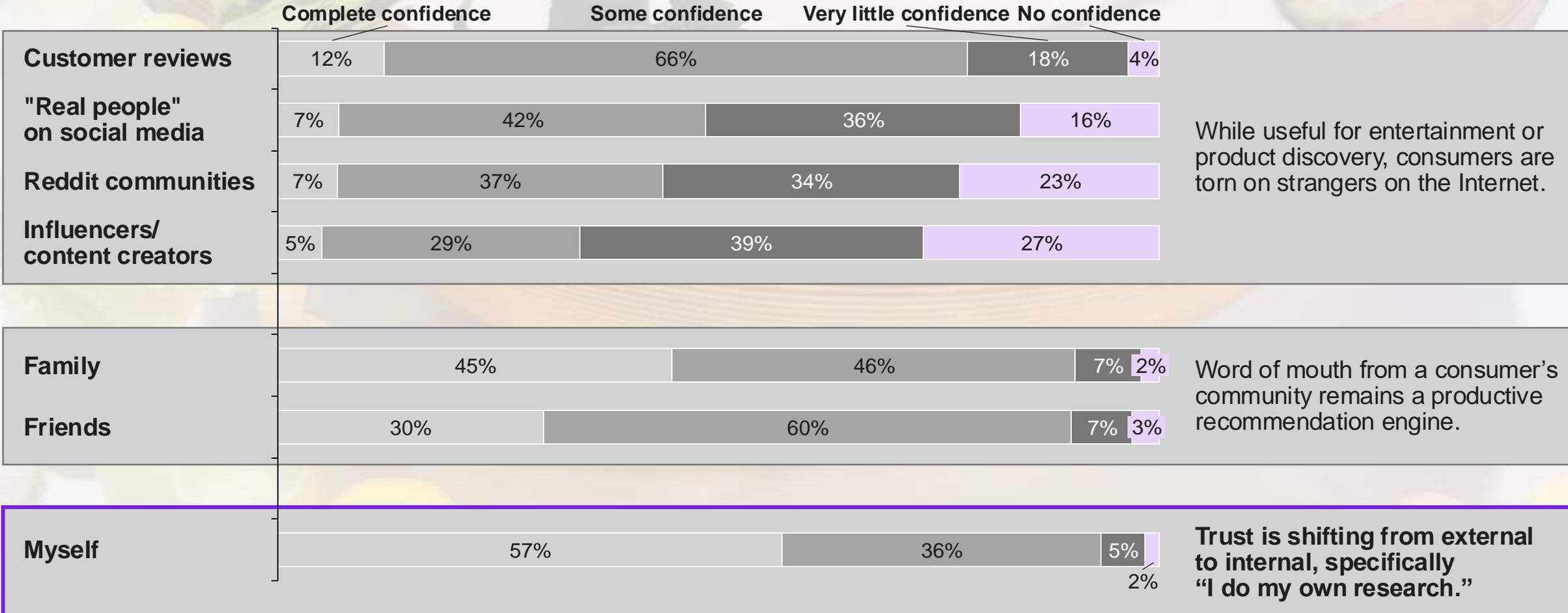
The decline in trust in core institutions is well-documented (from sources such as Pew Research and the Edelman Trust barometer). Longitudinal Kearney data confirms the erosion of trust.

Consumers who report “complete confidence” in the institution



As content creators and incentivized reviews expanded, consumer trust has also declined in “real people”

Consumers who report “complete confidence” in the person/people





**Consumers are
confused and
uncertain.**

70%

of consumers agree
“I don’t know what
information to
believe lately.”



87%

of consumers agree
“Information
shared is often
manipulated.”



This crisis of trust creates questions for brands:

Has **consumer trust** gone bust?

Does trust matter?

Can trust be built right now?

How does trust fit into brand priorities?

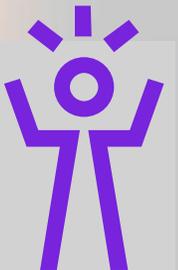


Abandoning trust is not the answer.

Consumers are still seeking trust, but it requires breaking down the vague buzzwords that typically define it.

dependability mutual
quality respect privacy engagement
authenticity communication values
transparency competence
service consistency customer
honesty empathy testimonials
interest
ethics

Simplifying these elements makes trust more actionable.



Tailor trust to the consumer and product.

Pillars of trust

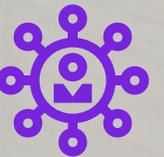
Consistency-based trust

product



Relationship-based trust

people



Values-based trust

brand



Consistency-based trust

Centered around the product

A consistent experience over time

Minimal changes, or changes within reason

▶ **90%** of consumers trust brands that consistently deliver.

“I get what I expect.”

“I’ve been using it for a long time.”

“You never want the items you have been using for many years to all of a sudden change the scent like [brand] did.”

Source: Kearney Consumer Institute – Trust Study, Q1 2025, US data

Does consistency-based trust matter? Why?

Yes. Consumers are seeking **brands they know they can count on** (for a consistent experience). It simplifies their decision-making given the increasing number of options.

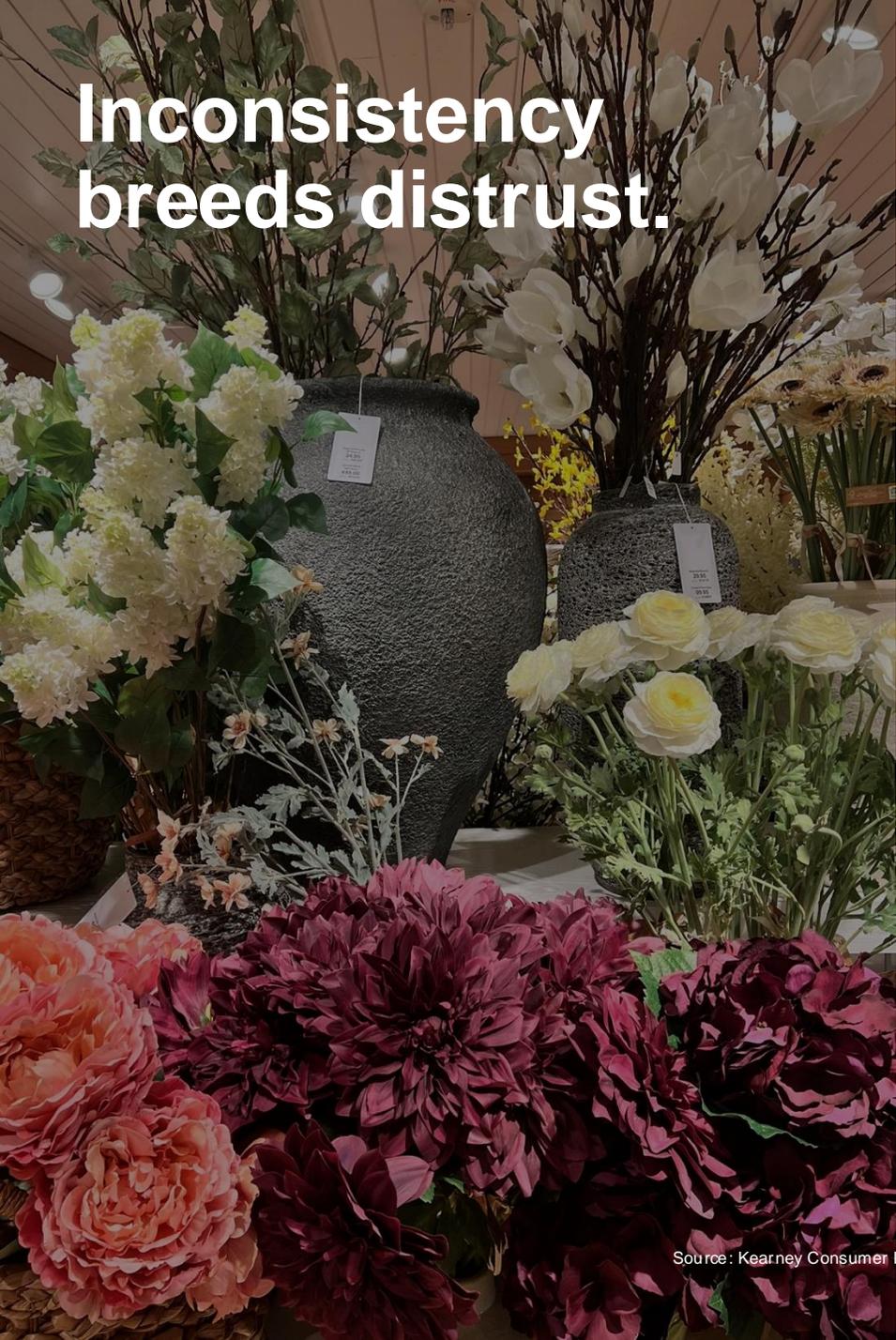
Can consistency-based trust be built right now?

Sort of. Consistency-based trust happens over time. And **avoid the trustbusters** (see next page).

How does consistency-based trust fit into brand priorities?

Delivering a consistent experience is the **most controllable**, with levers to pull directly related to **product/experience**. However, it often conflicts with short-term margin pressures.

Inconsistency breeds distrust.



Potential trustbuster

Shrinkflation (reducing amount in pack with same price)

Price increases

Formula changes

Changing return policies

Packaging change

Risk

Inconsistent experience



Benefit

Margin neutral, may keep price flat for consumers

Margin neutral

Formula improvement, cost save

Managing return logistics/ cost

Cost save, sustainability

% of consumers that noticed when their favorite brand...

... increased price by more than 10%

62%

... changed amount in the package

46%

... changed the formula, ingredients, or materials

24%

Relationship-based trust

Centered around people and cultivating relationships

Dialogue, engagement, feedback loops, community, and customer service

Trust as a two-way street, including brands finding ways to extend trust to consumers

Source: Kearney Consumer Institute – Trust Study, Q1 2025, US data

Does relationship-based trust matter? Why?

Yes. Consumers want to **engage and dialogue** with their favorite brands. This type of interaction drives excitement, differentiation, and brand loyalty.

Can relationship-based trust be built right now?

Yes. There is opportunity to connect and partner with consumers—**bringing them along for the ride and giving trust**. *See examples on page 14.*

How does relationship-based trust fit into brand priorities?

Scaling relationship-based trust **can be tricky**, whether it's service/labor or two-way dialogue. However, direct lines of communication **produce the best insights**.

Values-based trust

Centered around the brand's stated values, commitments, or policies

Can be polarizing. May alienate one group to include another or contribute to assumptions (e.g., *sustainable products are less effective*)

Organization-wide ideally (e.g., *if offering transparency in supply chains, must also in hiring practices*)

Source: Kearney Consumer Institute analysis

Does values-based trust matter? Why?

Sort of. In a world of increasing brands, consumers **can choose to shop by values that matter to them** (and **avoid brands that do not**). And some consumers are expecting brands to do the values-based work for them.

Can values-based trust be built now?

Yes, but **it's risky**. Many brands are not getting this right. Trust can be built by taking a stand or position, but it **risks losing consumers**.

How does values-based trust fit into brand priorities?

Some consumers will shop based on values (even over product functionality). It comes down to **differentiation within the category and comfort with risk-taking**.

**Consumers
can be
conflicted over
brand values.**



They want to hear them...

68% of consumers
think brands
should voice
their values.

... but may use them against you

51% have stopped
shopping a brand
that did not align
with their values
or politics.



**And many believe brands don't
follow through**

49% of consumers
think brands do a
good job of living
by the values
they voice.



Consumer Institute - Trust Study, Q1 2025, US Data

Examples

Consistency-based trust

Arizona Tea has held MRSP at \$0.99 despite most other FMCG brands raising prices.



The “Buy it for life” Reddit community recommends products around the world for their consistency and durability.



Relationship-based trust

Luxury brands are typically on the cutting-edge of relationship-building tactics given personal shopper relationships and sales agents empowered to elevate feedback.



Beauty and personal care brands are “getting in the comments,” talking to consumers directly, amplifying user-generated content, and rewarding top consumers (not just influencers).



Lay’s do-us-a-flavor encourages consumers to participate in suggesting or voting for a new chips/crisps flavor.



Values-based trust

Some brands are associated with more political values...



... others focus on ESG claims.



Many business leaders have spoken out against certain political parties.



“Interesting insights, but what do I do with this information?”

Ask these questions:

Consistency

What current initiatives will result in inconsistency, and are they worth it in the medium term?

Relationship

What are some small ways to connect with consumers and show them trust?

Values

Is a focus on communicating values worth the risk in the current climate?

Do less.



Focus on one pillar of trust.

Kearney Consumer Institute (KCI)



What is it?

Kearney think tank creating thoughtful, consumer-first content and perspectives, assessing existing and evolving consumer behaviors, needs, and decision-making



What does it do?

Advocates for the consumer

Challenges existing assumptions

Reframes to ask different questions

Generates conversation

Translates into action

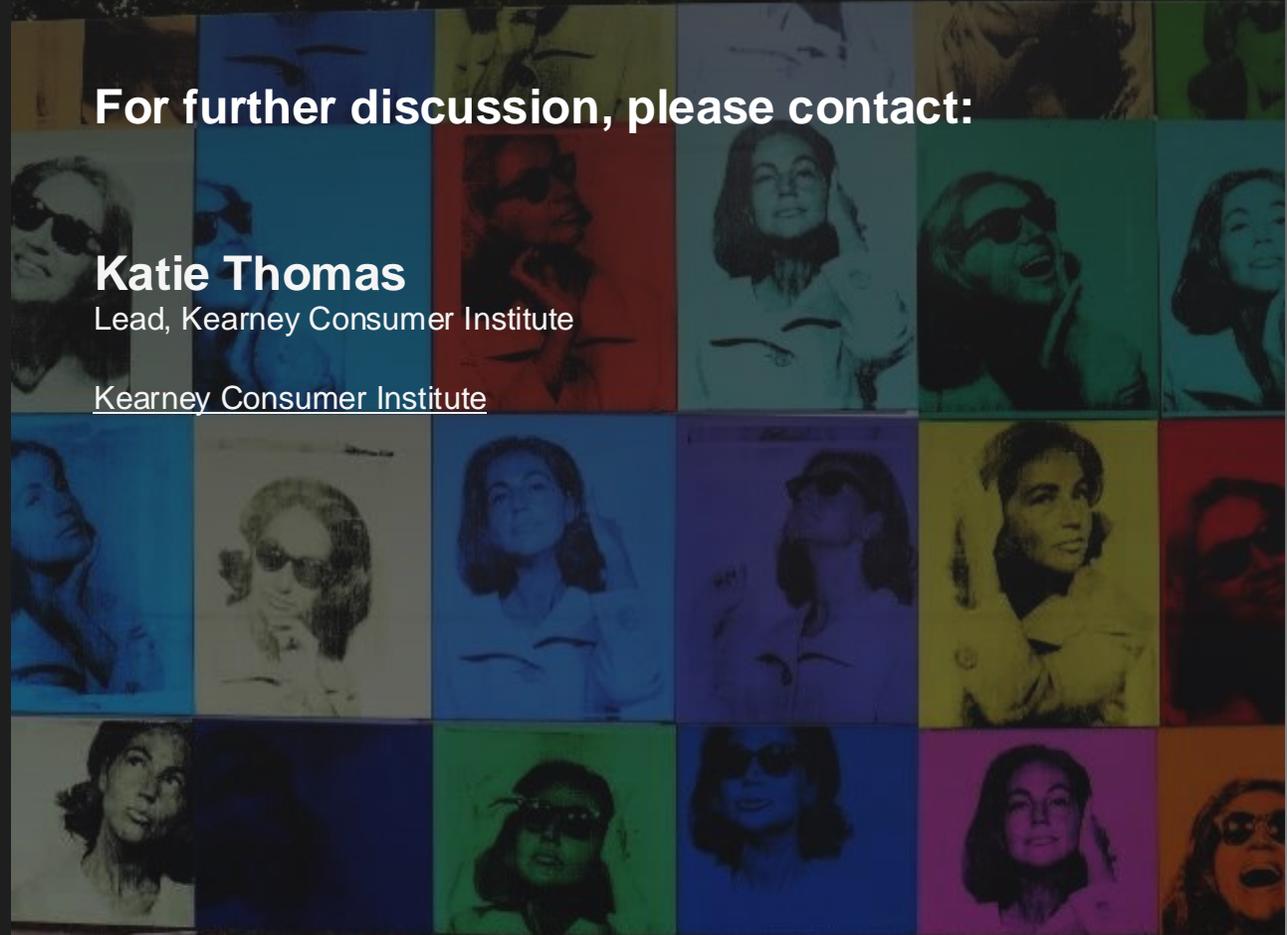
KEARNEY

For further discussion, please contact:

Katie Thomas

Lead, Kearney Consumer Institute

[Kearney Consumer Institute](#)



Appendix: International data

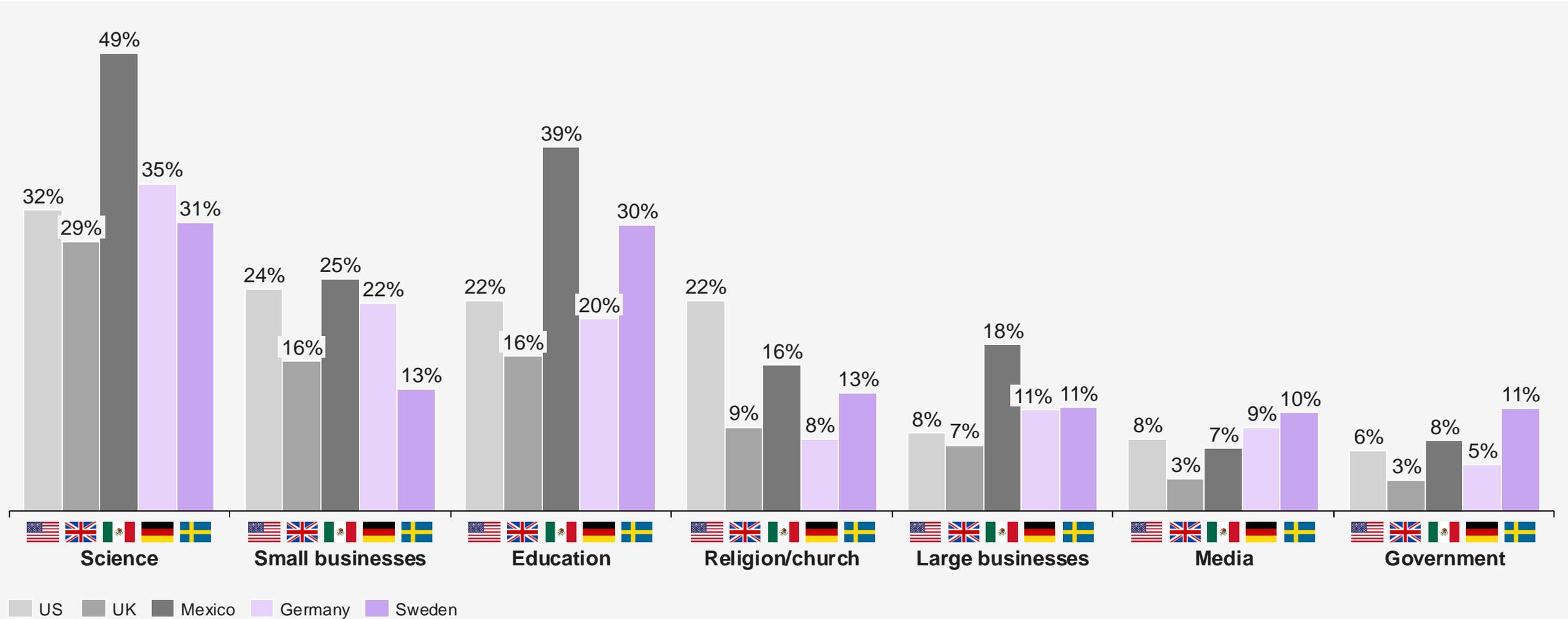
Data in report is from US survey.

Appendix includes United Kingdom, Mexico, Germany, and Sweden.



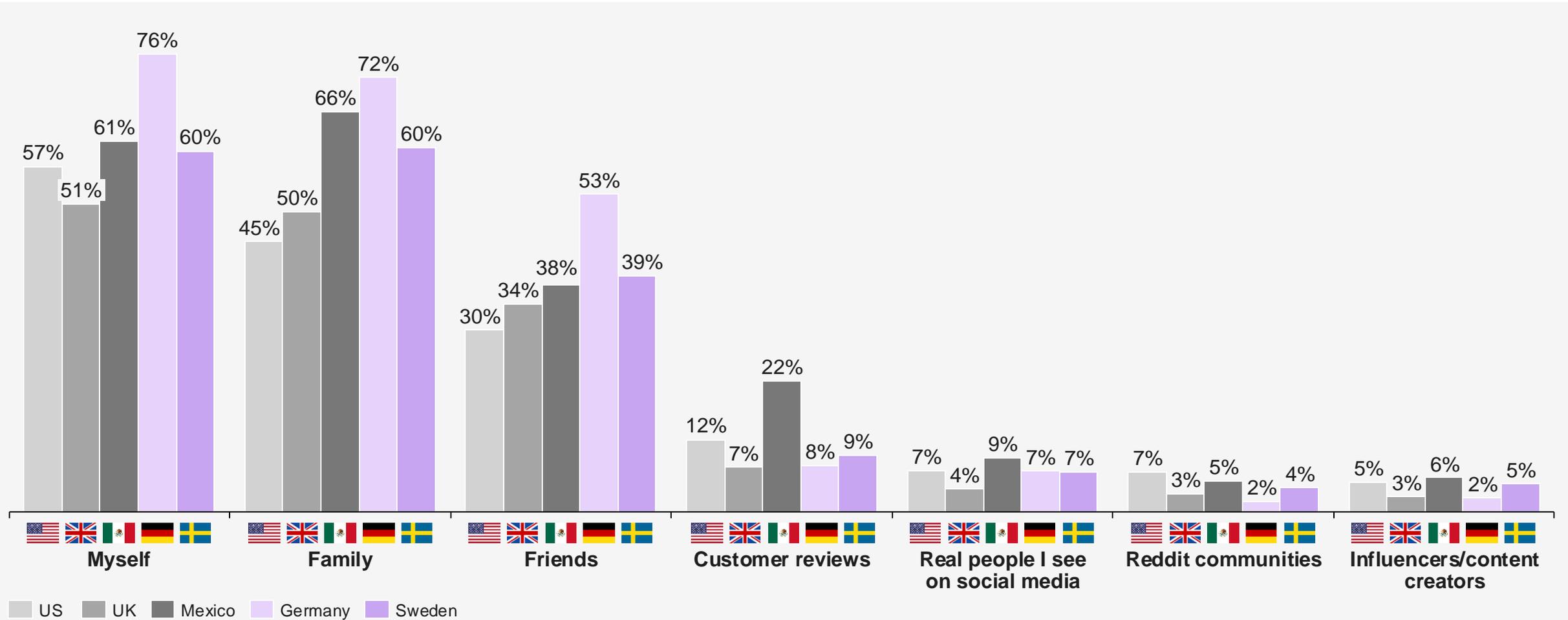
Mexican consumers are generally more trusting and UK consumers less.

Consumers who report “complete confidence” in the institution



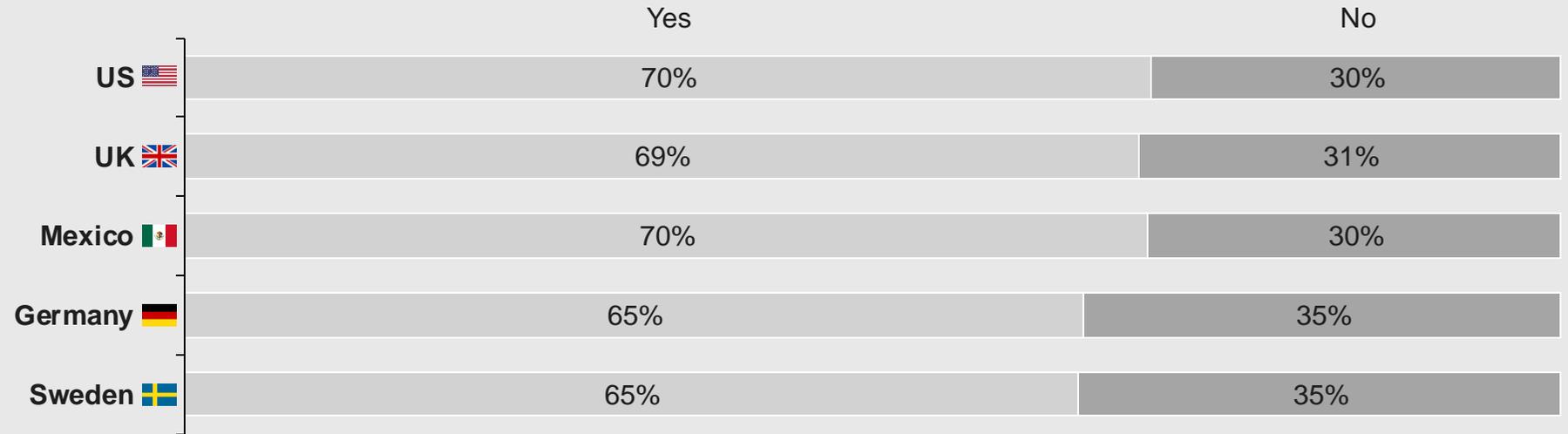
Trust in self and loved ones remains the most powerful across surveyed geographies; level of trust varies.

Consumers who report “complete confidence” in the person/community

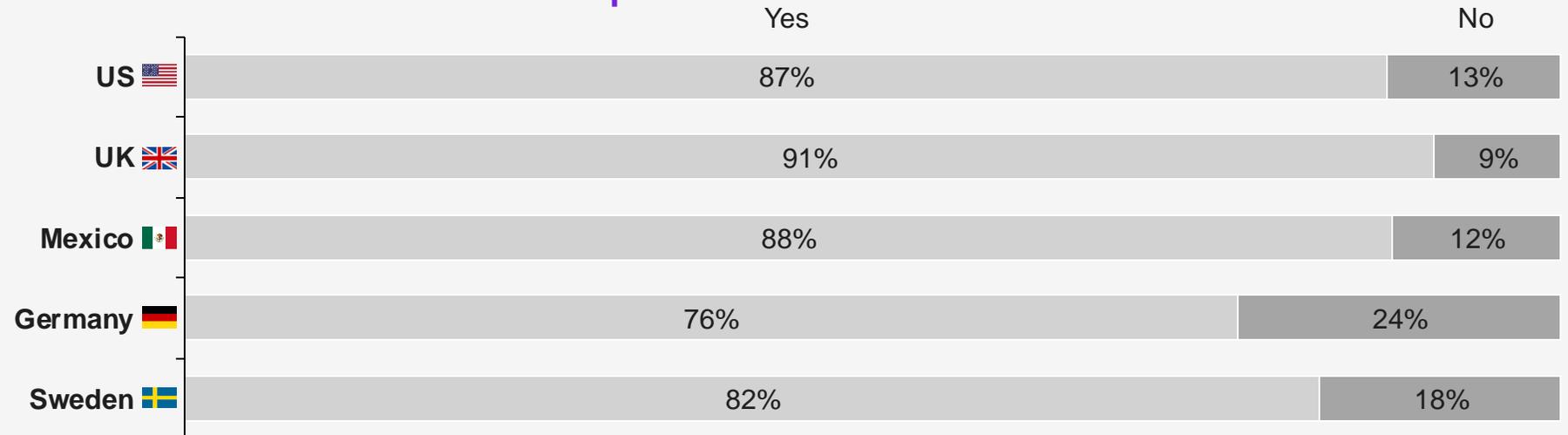


Consumers are confused and skeptical across geographies.

I don't know what information to believe lately



Information shared is often manipulated



Consumers are similarly aware of inconsistent product experiences.

% of consumers that noticed when their favorite brand...	US 	UK 	Mexico 	Germany 	Sweden 
Increased the price by a lot <i>(more than 10%)</i>	62%	58%	64%	64%	60%
Reduced the amount in the package	46%	46%	37%	37%	37%
Changed the formula, ingredients, or materials <i>(such as in food, beauty, or clothes)</i>	24%	23%	33%	26%	27%

Consumers' perception on the relationship between brands and values varies.

% of consumers that agree	US 	UK 	Mexico 	Germany 	Sweden 
I think brands should voice their values.	68%	74%	78%	78%	78%
I have stopped buying/shopping a brand/store that did not align with my values or politics.	51%	39%	58%	56%	55%
Brands do a good job of living by the values they voice.	49%	49%	64%	64%	53%

Source: Kearney Consumer Institute – Trust Study, Q1 2025