



Trust us:  
Winning strategies  
from the top trusted  
consumer brands

## Introduction

Earning trust is hard. It can't be bought and disingenuity is easily recognized—and rebelled against. Yet, our research of some of the most trusted consumer brands found three key themes that can help other brands *authentically* position themselves as trustworthy organizations with consumers and employees alike. Specifically, these trusted brands commit—and lead—in three key tenets:

### Brands that are human, win.

Regardless of service or product price point, authenticity and acting with humanity can drive almost any brand into the top tier of trust.

### Show you care, keep your promises.

Creating quality products and experiences is table stakes for any brand—but there are some that raise the bar on consistent quality standards. Showcasing one's ability to competently—and consistently—deliver on promises means customers come to rely on you for top quality, every time.

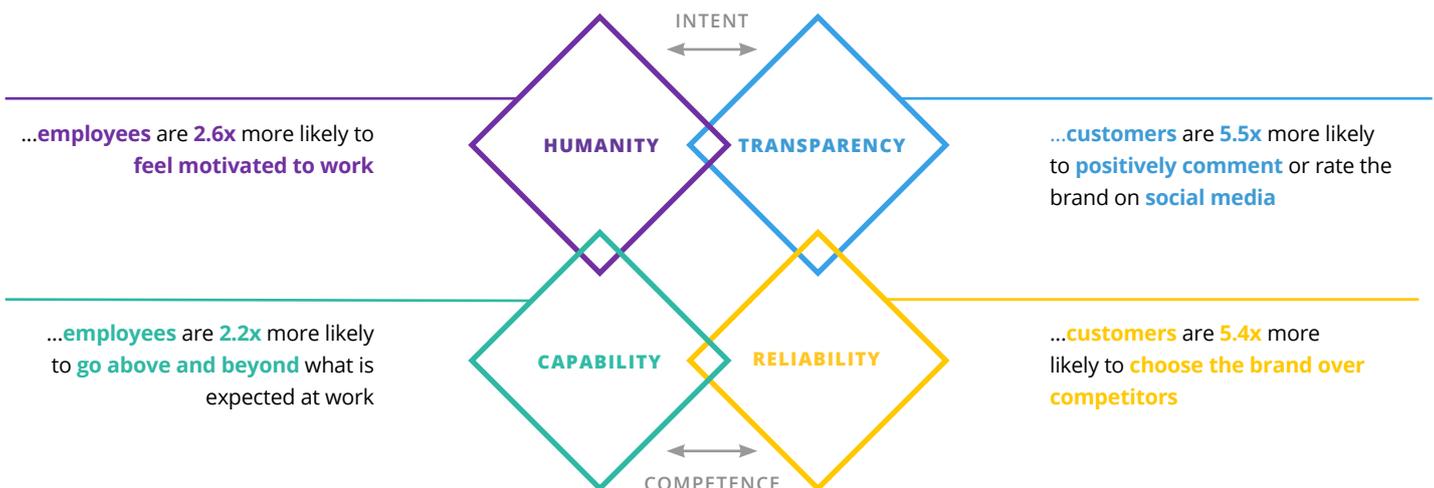
### Transparency makes you vulnerable (and that's a good thing).

Unsurprisingly, there is a large gap between how a brand's current customers perceive them versus those simply aware of their existence. But the most trusted consumer brands offer a path for closing that gap—and it starts with transparency.

## How do we know this?

In our earlier research, [A new measure of trust for consumer industries](#), we studied 3,000 customers and 4,500 employees to identify four signals that not only form the basis of trust, but also lead to positive consumer and employee outcomes<sup>1</sup>. The first two signals, Humanity and Transparency, reflect a brand's intentions, while Reliability and Capability demonstrate a brand's competency in fulfilling those intentions. Taken together, these four signals form what we refer to as the HX TrustID™ (see Designing the HX TrustID sidebar, page 4). Furthermore, HX TrustID enables us to correlate a brand's trust scores to a range of actual behaviors that indicate customer loyalty and employee productivity. For instance, customers who believe a brand is reliable are 5.4x more likely to choose that brand over competitors<sup>2</sup>, and employees who believe their employer is humane are 2.6x more likely to feel motivated to work<sup>3</sup>. Beyond these examples, strong connections exist between trust scores and consumer purchasing and social sharing, as well as employee satisfaction and initiative.

## Measuring trust: integrated signals



## Follow the (trust) leaders

Given these insights, we set out to understand which brands are at the forefront of cultivating trust and specifically, what makes them stand out from the rest of the field. Taking a multidisciplinary approach, we analyzed more than 200 consumer brands and through various clustering techniques (see Benchmarking Consumer Brands sidebar, page 5), identified 52 brands that consistently outperformed their peers in the eyes of the consumer.

Going deeper, we then performed another clustering technique to understand what made those high performing brands special. From this analysis, three unique clusters of highly trusted brands emerged. The **Trust Leaders** are exceptional across all four signals. The next cluster exhibit the **Humanity Trust Factor**, leading the field on intent—but especially Humanity. Inversely, the final cluster exhibit the **Capability Trust Factor**, distinguishing themselves with their competence.

Importantly, scrutinizing these three clusters revealed that beyond its emotional importance, trust carries strong financial value.

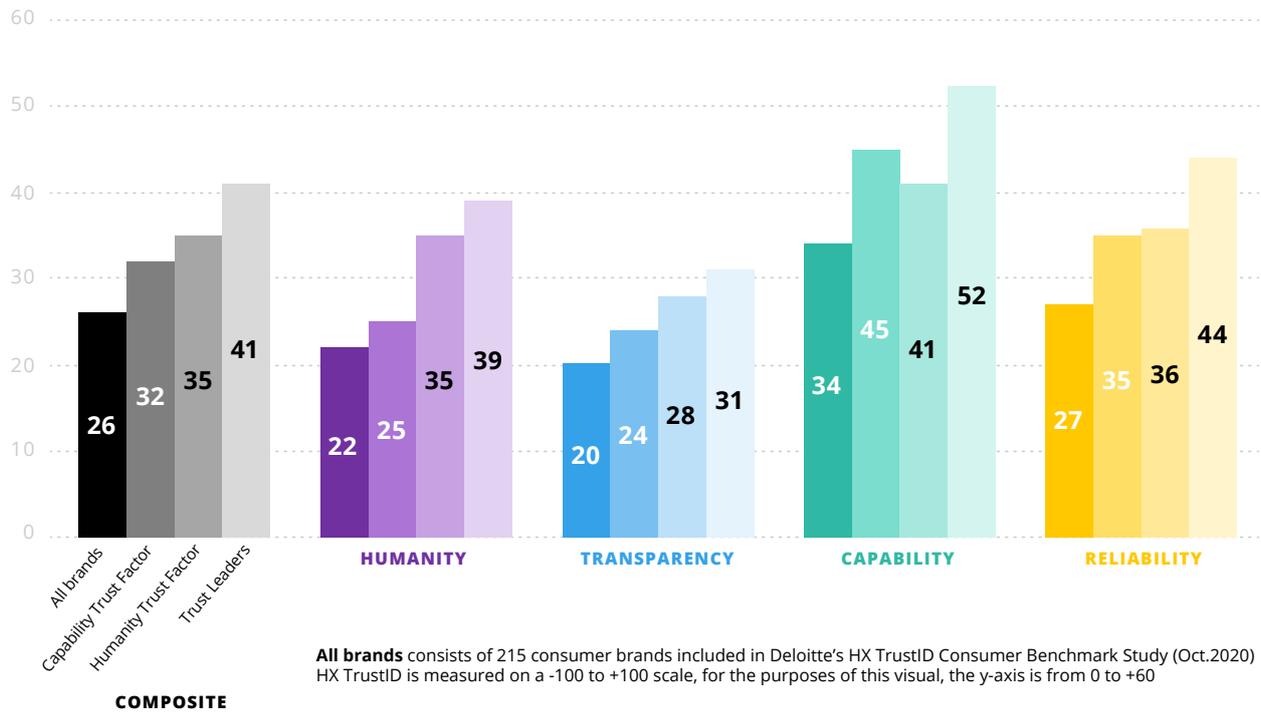
Highly trusted brands were **2x more resilient** during the pandemic, when economic uncertainty caused sales to fall dramatically.<sup>4</sup>

Trust built with all humans—customers, workforce, and partners—had a distinct correlation with performance and was a market indicator of how businesses may weather economic upheaval.

### HIGHLY TRUSTED BRAND CLUSTERS



### HX TRUSTID SCORE BY CLUSTER



## Designing the HX TrustID™

Across multiple studies, we built a database with survey data from more than 93,000 respondents from a diverse set of consumer industries—including consumer products, retail, travel, hospitality, and automotive—to better understand their relationships with brands they trust or their current employer.

To define our four signals of trust—Humanity, Transparency, Capability, and Reliability—we conducted extensive secondary research across social science experts (e.g., Brené Brown and the Journal of Trust Research) and other leading trust organizations. From these inputs, we utilized advanced analytical models to identify the drivers of trust, the attributes that build trust, and the predicted outcomes of being highly trusted. HX TrustID also quantifies the relationship between trust beliefs and behaviors. This solves an issue with existing performance measures that focus only on what people say which, in reality, is often different from how they actually behave.

### HX TrustID trust signal definitions



Demonstrate empathy and kindness towards me and treat everyone fairly



Openly share all information, motives, and choices in straightforward and plain language



Create quality products, services, and/or experiences



Consistently and dependably deliver on promises

## Benchmarking Consumer Brands

In our study conducted to benchmark HX TrustID scores across the consumer industry, we surveyed respondents in relation to more than 200 consumer industry brands and collected more than 85,000 data points. For each brand, respondents indicated whether they purchased from the brand or were aware enough of the brand to describe it to a friend. They then answered a series of questions that uncovered their sentiments, self-reported behaviors, and trust signal ratings in relationship to the brands they were either aware of or purchased from in the past.

The data points were aggregated at the brand level to calculate signal scores for Humanity, Transparency, Capability, and Reliability. Signal scores range from -/+100 and represent a net percent of customers who agree that a brand exhibits the qualities of that signal. We then averaged together each brand's individual signal scores to develop its composite HX TrustID score—which can also range from -/+ 100.

## Identifying the HX TrustID leaders

To identify the Trust Leaders for this article, we performed two iterations of clustering analysis.

First, we employed principal component analysis to understand where there are natural patterns (i.e., intrinsic dimensions) in the response data. This analysis helped us identify 52 brands (of the original 215) as “higher performers” in terms of trust.

In our second iteration, we isolated the high performers and used a K-means clustering approach to determine *how* the top 52 brands separated themselves from one another. Within the high-performer category, we identified three distinct brand clusters:

**Trust Leaders** (20 brands)

**Humanity Trust Factor** (21 brands)

**Capability Trust Factor** (11 brands)

With these three clusters identified, we compared each group's trust signals to uncover the unique attributes that inform the final results of this article.

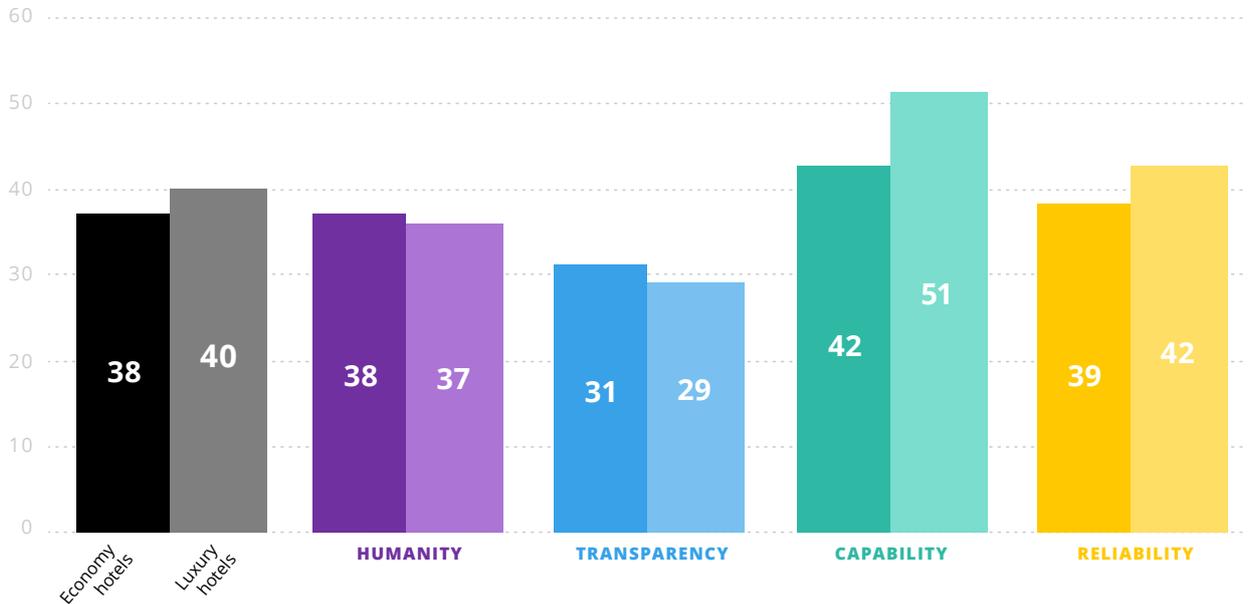
## Brands that are human, win

When we analyzed what made the Human cluster exceptional, a truly inspirational insight emerged: Regardless of product category or price point, customers consistently recognize the brands that authentically act with humanity. Garnering consumer trust doesn't always have to be about overhauling business models, revising supply chains, or charging more to deliver better experiences—instead it's about recognizing and treating people as humans.

This point may best be illustrated by the economy hotel segment. The Human cluster includes seven different economy hotel brands. Now, compare them to the luxury hotel segment. Based on the difference in price points, it's no surprise that luxury brands outperform their economy brand peers in terms of Reliability and Capability. Yet, by putting a premium on Humanity that matches luxury brands, the economy brands are elevated in the minds of consumers as brands worthy of their trust.

How are economy hotels bringing this to life? Consider Marriott International owned Four Points and Fairfield Inn. A few years ago, Marriott International recognized a difficult travel environment and launched their “Golden Rule” campaign across its brand portfolio to highlight the human connection fostered by going “beyond making one's bed to making someone's day.”<sup>5</sup> Each story showcases how real-life associates put humanity at the forefront of their customer service at economy and luxury hotels alike.

## ECONOMY AND LUXURY HOTELS | HX TRUSTID SCORE

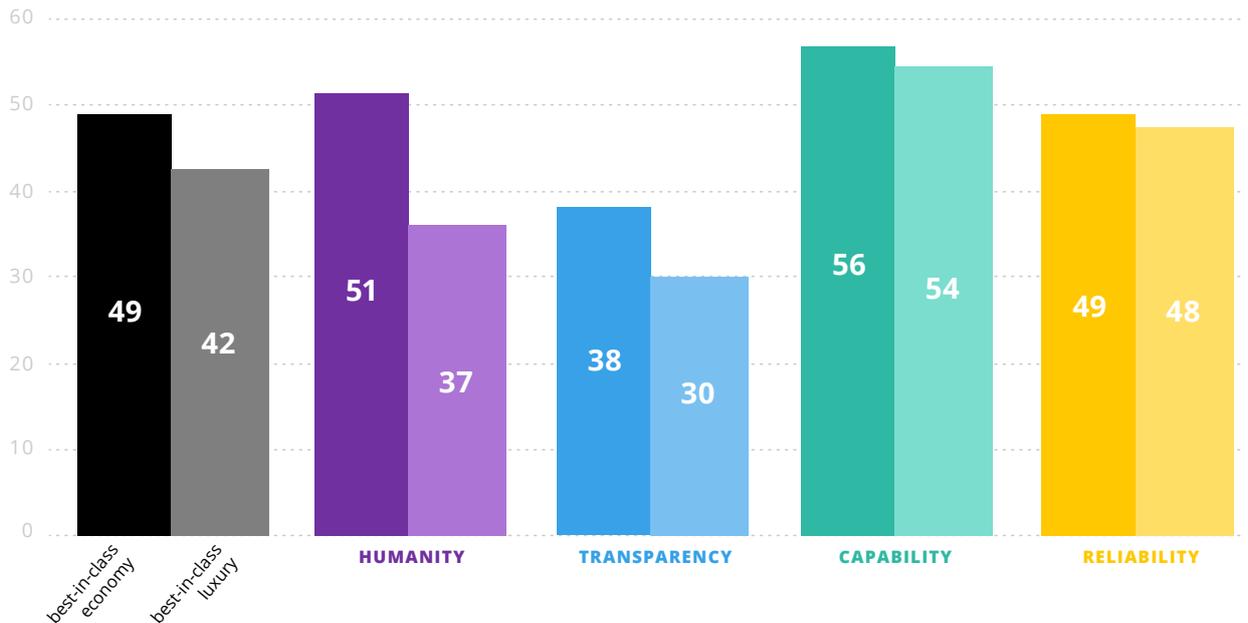


**COMPOSITE**

Includes all economy and luxury hotel brands in Deloitte's HX TrustID Consumer Benchmark Study (October 2020). HX TrustID is measured on a -100 to +100 scale, but for the purposes of this visual, the y-axis is from 0 to +60.

Although luxury hotels lead on Capability and Reliability, economy hotels match (and even slightly surpass) them on Humanity and Transparency.

## BEST IN CLASS ECONOMY AND LUXURY HOTELS



**COMPOSITE**

HX TrustID is measured on a -100 to +100 scale, but for the purposes of this visual, the y-axis is from 0 to +60.

The best-in-class economy hotel surpasses the best-in-class luxury hotel on all signals—with the biggest lead on Humanity.

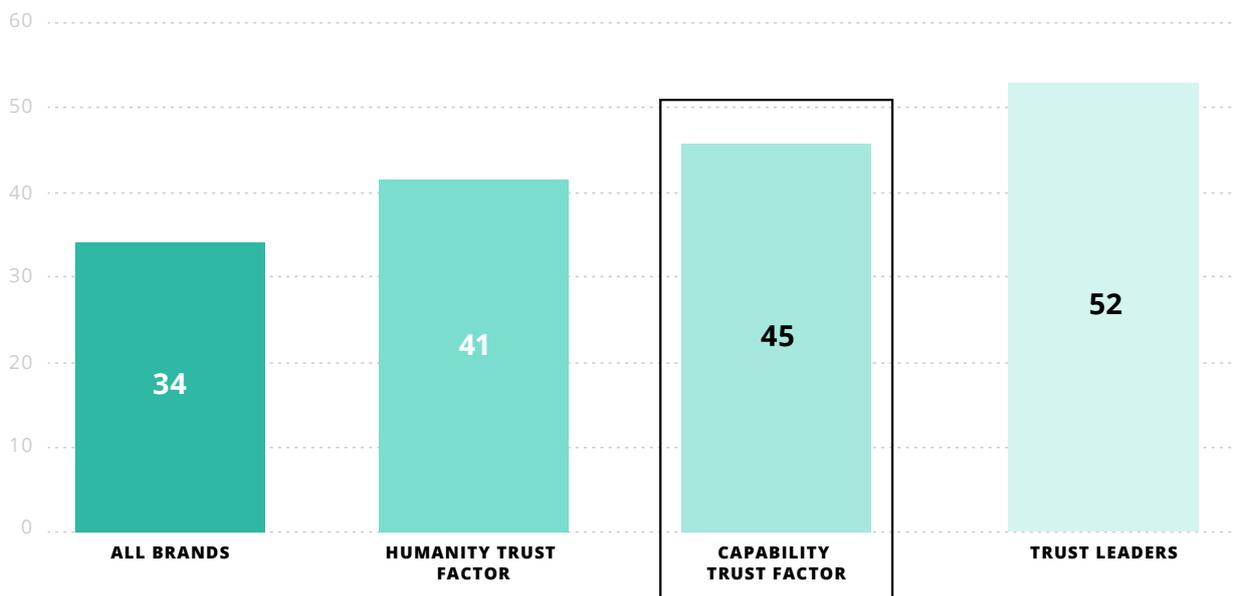
Now, contrast hotels with the auto industry. While six luxury auto brands appear in at least one of our three clusters, not a single economy auto brand cracked the top 50! But it doesn't have to be that way. For instance, Lexus, a member of the Trust Leaders, has a Humanity score of 40 (the Humanity Trust Factor average is 35). Lexus brings humanity to life by upholding their guiding principle, "People first." And at the height of the pandemic, their dealership network took this principle to heart by offering payment relief options to their customers and partnering with various community organizations to feed essential workers and families in need.

The lesson from the Humanity Trust Factor is you don't need to be a luxury brand to treat people like humans—but it does require a deep and committed passion to empathetically helping others to earn trust.

## Show you care, keep your promises

The brands with the Capability Trust Factor excel at delivering on quality (second only to the Trust Leaders). Consider Patagonia. It may be no surprise the consumer brand holds a Capability score of 45. Patagonia not only prioritizes quality, but also does so with an emphasis on sustainability. To ensure quality throughout its products, Patagonia employs a quality rating system that's "designed with ecological footprint in mind."<sup>6</sup> In doing so, Patagonia is recognizing and delivering against the needs of their humans and the mutual importance of restoring our planet.

### CAPABILITY SCORE BY CLUSTER



All brands consists of the 215 consumer brands included in Deloitte's HX TrustID Consumer Benchmark Study (October 2020)  
HX TrustID is measure on a -100 to +100 scale, but for the purposes of this visual, the y-axis is from 0 to +60

Of course, Patagonia has carefully positioned itself as a leader in quality, but a deeper look into the brands with the Capability Trust Factor reveal a foundational insight: capable brands that have upped the table stakes in both quality and consistency have proven that customers can count on them. Especially when a moment of need arises.

To our initial surprise, five household brands scored high enough in capability to merit the Capability Trust Factor. We believe much of this has to do with some of these brands swiftly demonstrating their capabilities at the height of the pandemic. For instance, Lysol has been killing 99.9% of surface viruses for a long time, but when the world needed a capable cleaner, Lysol answered the call by tripling its production through an expanded global supply chain.<sup>7</sup>

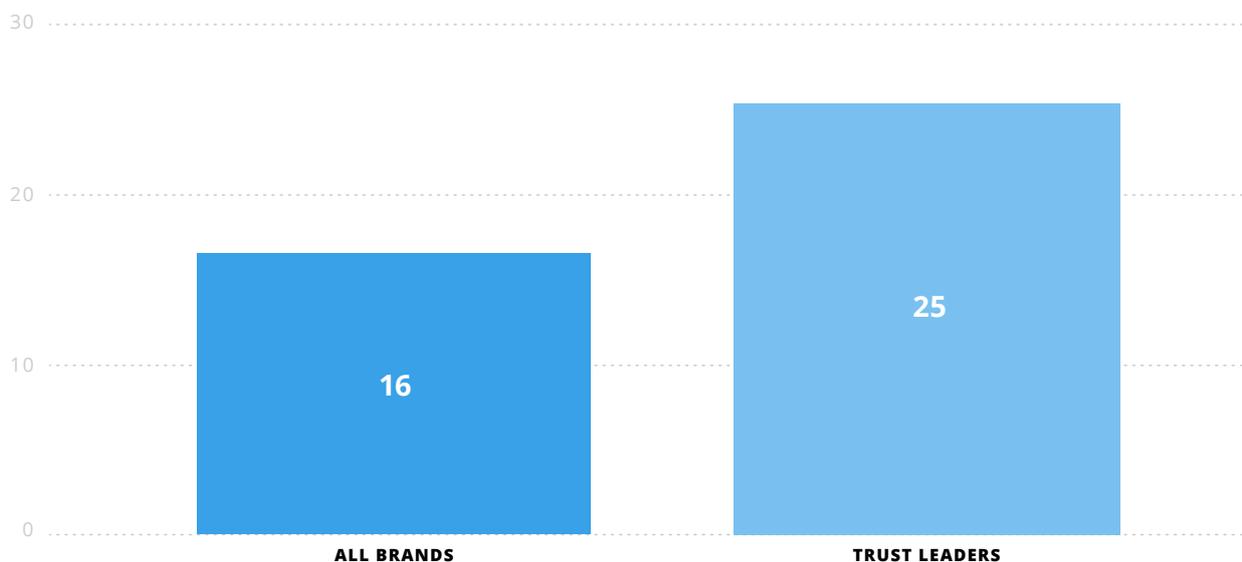
Beyond pandemic responses, a more universal lesson rises to the forefront: highly competent brands can more agilely respond to moments that matter. This reinforces their strong capabilities in the eyes of the customer—and builds trust while doing it.

## Transparency makes you vulnerable (and that's a good thing)

While the Trust Leaders are holistically building trust across all four signals, one particular area caught our eye—their focus on Transparency is noticed both by existing and potential customers alike.

We expect *existing* customers to score brands higher than those simply aware of the brand (after all, you are more likely to do business with a brand or a company that you trust), but when we compared HX TrustID scores amongst existing and potential customers, the Trust Leaders had the smallest gap in its Transparency trust signal scores. That is, even people who are not currently customers of any given Trust Leader brand *still* view these brands as highly transparent. This is especially true when comparing potential customers for Trust Leaders against potential customers for all brands. While the Trust Leaders average a 25 for Transparency with potential customers, all other brands only net a 16.

### TRANSPARENCY SCORES OF POTENTIAL CUSTOMERS



HX TrustID is measure on a -100 to +100 scale, but for the purposes of this visual, the y-axis is from 0 to +30

What can we learn from the Trust Leaders? When you are transparent, even noncustomers will take note and perceive your brand as more trustworthy. This may be especially true when delivering bad news to the public.

Last year, when Marriott International had to confront the cold reality that COVID-19 would wreak havoc on its business, CEO Arne Sorenson sent a video message to all employees clearly laying out the reality of the situation—and he didn't sugarcoat it either. Shared on social media, Sorenson clearly and compassionately said, "There is simply nothing worse than telling highly valued associates, people that are the very heart of this company, that their roles are being impacted by events completely outside of their control."<sup>8</sup> He acknowledged the situation and pledged to not take a salary for the remainder of the year and reduce the rest of the executive team's salary by 50%.

It takes strong, empathetic leadership to give tough messages in plain speak. In Marriott International's case, it may not be a surprise that not only is it a Trust Leader, but also the Transparency score gap between existing and aware customers is almost nonexistent (33 versus 31, respectively).

## Becoming a Trust Leader

While garnering trust is hard, strong leadership can make it a reality. As you aim to be a trust leader in the eyes of the humans you serve, remember these three insights from some of our most trusted consumer brands:

### **Brands that are human, win.**

Trust starts with authentic and empathetic leadership. While the good news is it doesn't cost extra to act more human, it does require passion and commitment.

### **Show you care, keep your promises.**

For those highly confident in their brands' ability to deliver quality products and experiences, be attuned to responding to moments that matter.

### **Transparency makes you vulnerable (and that's a good thing).**

Whether it's a global pandemic or a data breach, customers and employees alike will appreciate candid and honest conversations—even when it's a hard message to give.

Each of our clusters provide insights and learnings that others can adopt. And when brands lead with humanity, trust—and performance—will follow.

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## Endnotes

1. Ashley Reichheld, Mark Allen, Michael Bondar, Deirdre O’Connell, and Andy Sussman, [A new measure of trust for consumer industries](#), Deloitte Digital, July 6th, 2020.
2. Deloitte HX TrustID Survey, May 2020
3. Ashley Reichheld, Mark Allen, Michael Bondar, Deirdre O’Connell, and Andy Sussman, [A new measure of trust for consumer industries](#), Deloitte Digital, July 6th, 2020.
4. Comparison of pre-COVID-19 financial reports to 2020 proved that the price-to-sales ratios across the three highly trusted brand clusters more than doubled, on average. For less trusted brands, their price-to-sales ratios remained relatively flat.
5. [Marriott International Debuts First-Ever Campaign For New Category Marketing Approach](#), Cision PR Newswire. August 14th, 2017.
6. [Quality Is an Environmental Issue](#), Patagonia, accessed on April 2, 2021.
7. Drew Armstrong, [America Just Can’t Get Enough Lysol](#), Bloomberg, November 19, 2020.
8. From Marriott International’s [Twitter account](#), accessed on April 2, 2021.

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