

Emmett &
Churchman

In collaboration with

3Gem
Research & Insights

The
Trust
Advantage
2025

UPDATED JULY 2026

Methodology

Quantitative survey conducted August 2025.

200 senior technology buyers across defence, cybersecurity, IT, manufacturing, and science & engineering.

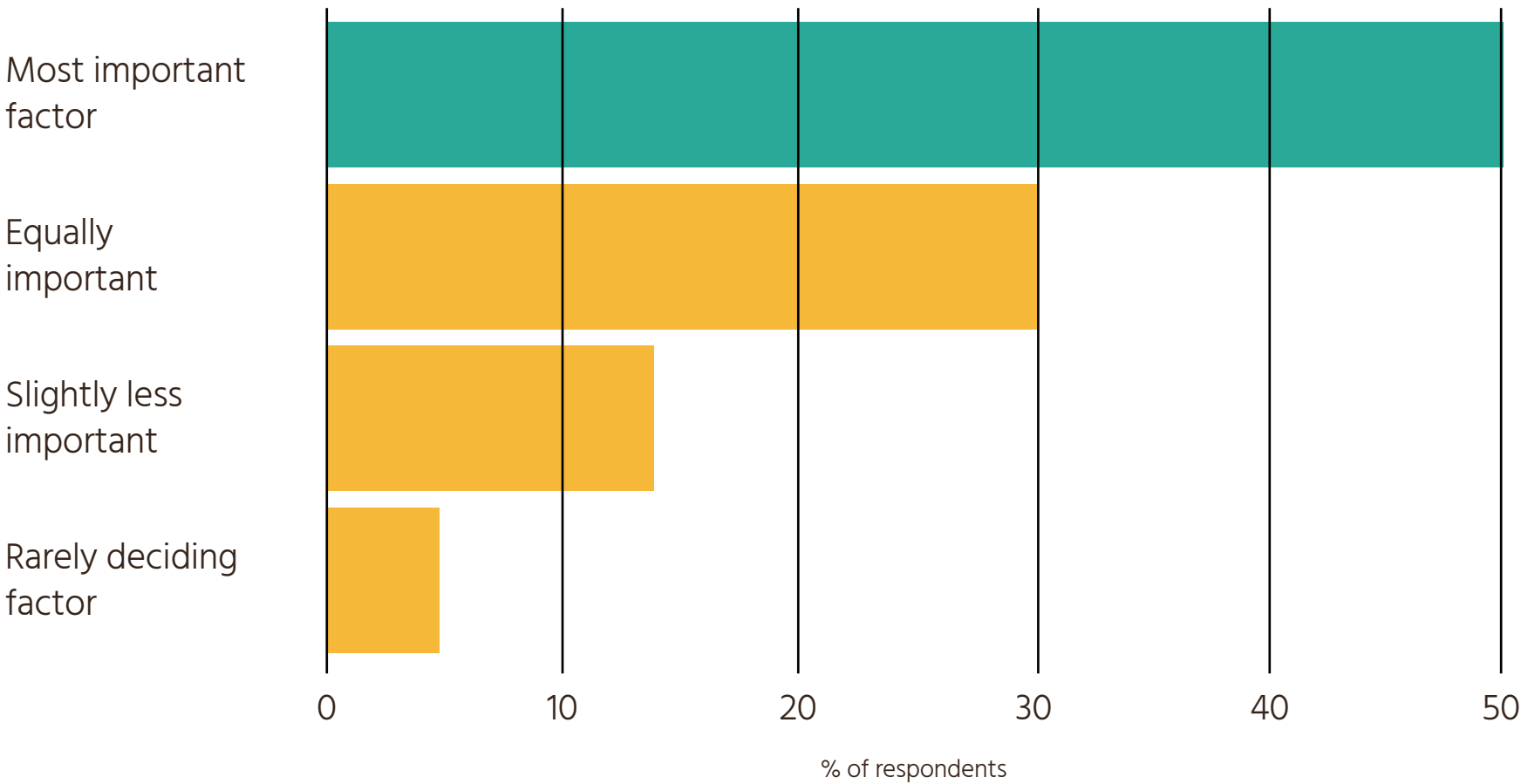
Roles included CIOs, CTOs, procurement leads, operations heads, and compliance managers.

Data analysed at topline and sector-specific levels.

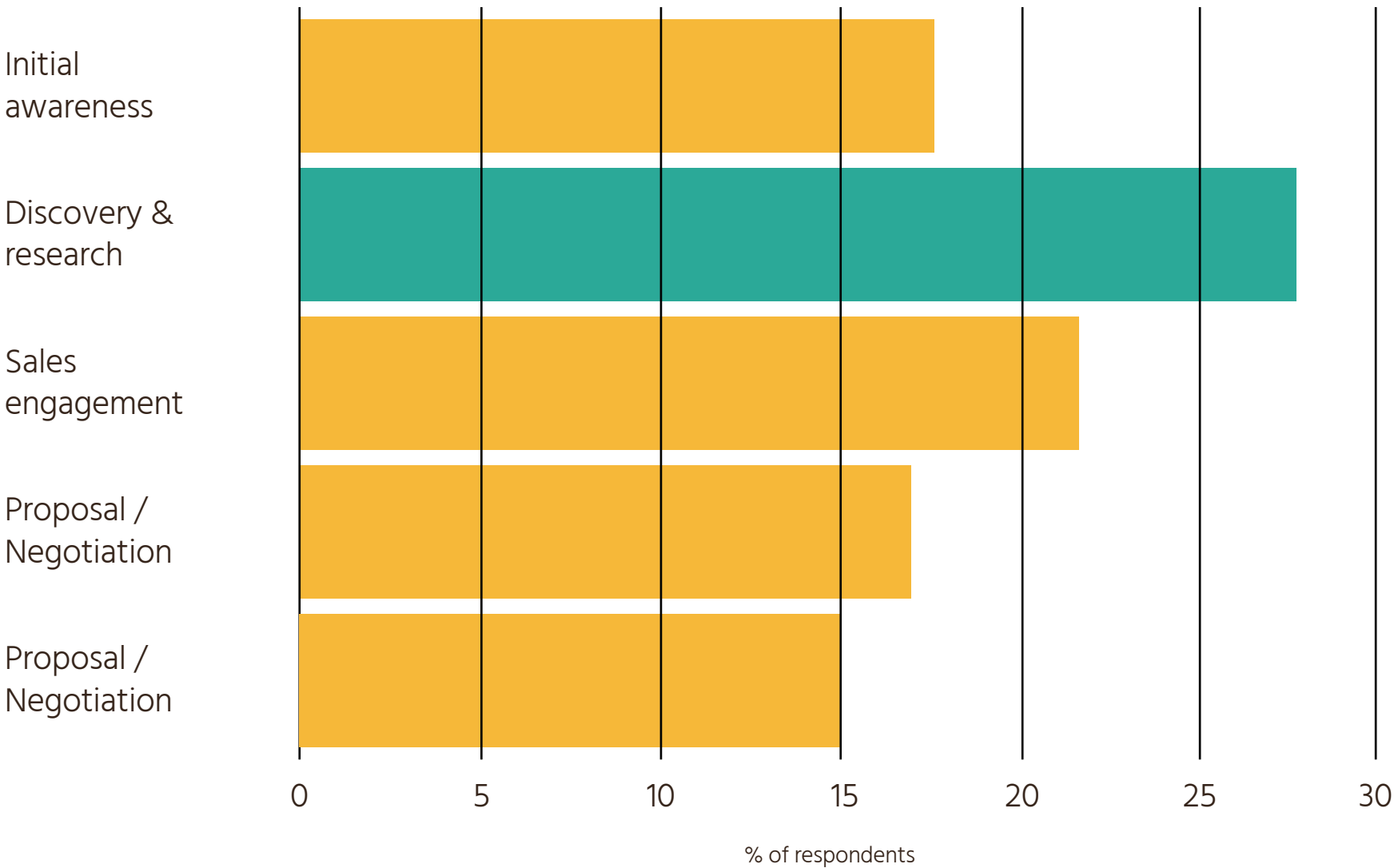
Findings were analysed alongside qualitative respondent comments and published research from Gartner, Edelman-LinkedIn and Coleman Parkes.

Snapshot

How buyers rank **trust** vs cost, innovation and delivery



Stage where buyers find it hardest to trust a supplier



Introduction

Trust has become a commercial advantage.

In B2B buying, trust influences who gets considered, shortlisted and selected.

Buyers are conducting more research than ever before. They are forming opinions before engaging with sales teams and evaluating suppliers through websites, thought leadership, customer evidence, analyst validation and peer recommendations.

For growing businesses, this creates both a challenge and an opportunity.

The challenge is that buyers often decide whether a supplier is credible long before a sales conversation takes place.

The opportunity is that trust can be built deliberately through commercial credibility, visible expertise and credible proof.

The Trust Advantage was created to understand how trust influences buying decisions in mid-sized B2B technology organisations.

Our research found that half of senior decision-makers rank trust as the most important factor in supplier selection, ahead of cost, innovation and delivery.

Almost seven in ten admitted they have walked away from a vendor because something did not feel right, even when the product or service appeared capable of meeting their needs.

Trust is therefore not simply a reputation issue.

It is a commercial issue.

Businesses that establish credibility early make it easier for buyers to engage, evaluate and choose them. Businesses that fail to do so often struggle to gain consideration regardless of technical capability.

This report explores how trust is built, where it is lost and what organisations can do to strengthen buyer confidence throughout the customer journey.



Lorraine Emmett

Managing Director, Emmett & Churchman



Vanessa Ashworth

FOREWORD

I've seen it many times. A business makes an important purchasing decision only to discover that the supplier cannot deliver what was promised.

In B2B markets, a poor supplier decision can waste time, delay projects, increase costs and damage confidence in both the supplier and the individual who approved the purchase.

That is why trust matters. Buyers conduct extensive research before engaging with a sales team. They assess suppliers through websites, thought leadership, customer stories, analyst reports, reviews, media coverage and recommendations from peers.

These sources help buyers answer a simple question: Is this organisation credible enough to trust?

When the answer is unclear, uncertainty grows. When confidence is high, decisions become easier.

Trust therefore influences far more than reputation. It affects shortlist inclusion, sales velocity, commercial outcomes and long-term customer relationships.

Credibility plays a central role in that process. Buyers look for evidence rather than claims. They want proof that a supplier understands their challenges, has solved similar problems before and can deliver the outcomes being promised.

This is why visible expertise matters. It is why customer advocacy matters.

It is why businesses that consistently communicate credibility often outperform competitors with similar products and services.

Credibility becomes even more important when experts do not stand alone. Customers, partners and independent voices all contribute to buyer confidence.

Organisations that provide consistent proof points throughout the buying journey reduce uncertainty and make decision-making easier.

The Trust Advantage turns trust from an abstract concept into something practical and measurable.

The findings highlight which credibility signals buyers look for, where confidence is won and lost, and how organisations can strengthen trust throughout the buying process.

The report provides valuable insight for any business seeking to strengthen credibility, build market confidence and improve commercial performance.



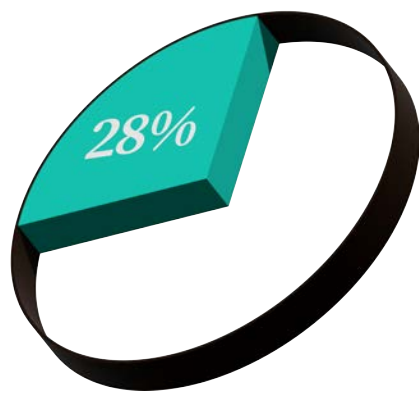
Executive summary

The role of trust in B2B buying



Trust is the most influential buying factor

Half of senior buyers (50%) said trust is the single most important factor in supplier selection, ahead of cost, innovation and delivery.



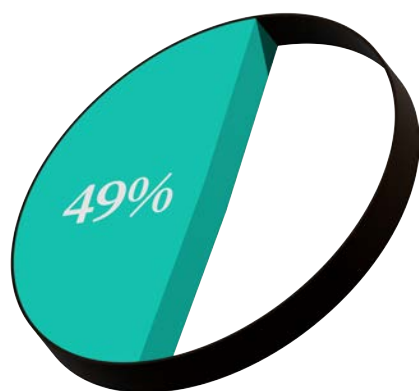
Trust is hardest to establish during research

More than a quarter (28%) said they struggle most to trust a supplier during the research stage before sales engagement begins.



Buyers look for evidence

Buyers rely on transparent pricing (49%), case studies (48%), compliance credentials (45%) and visible leadership (25%) when assessing supplier credibility.



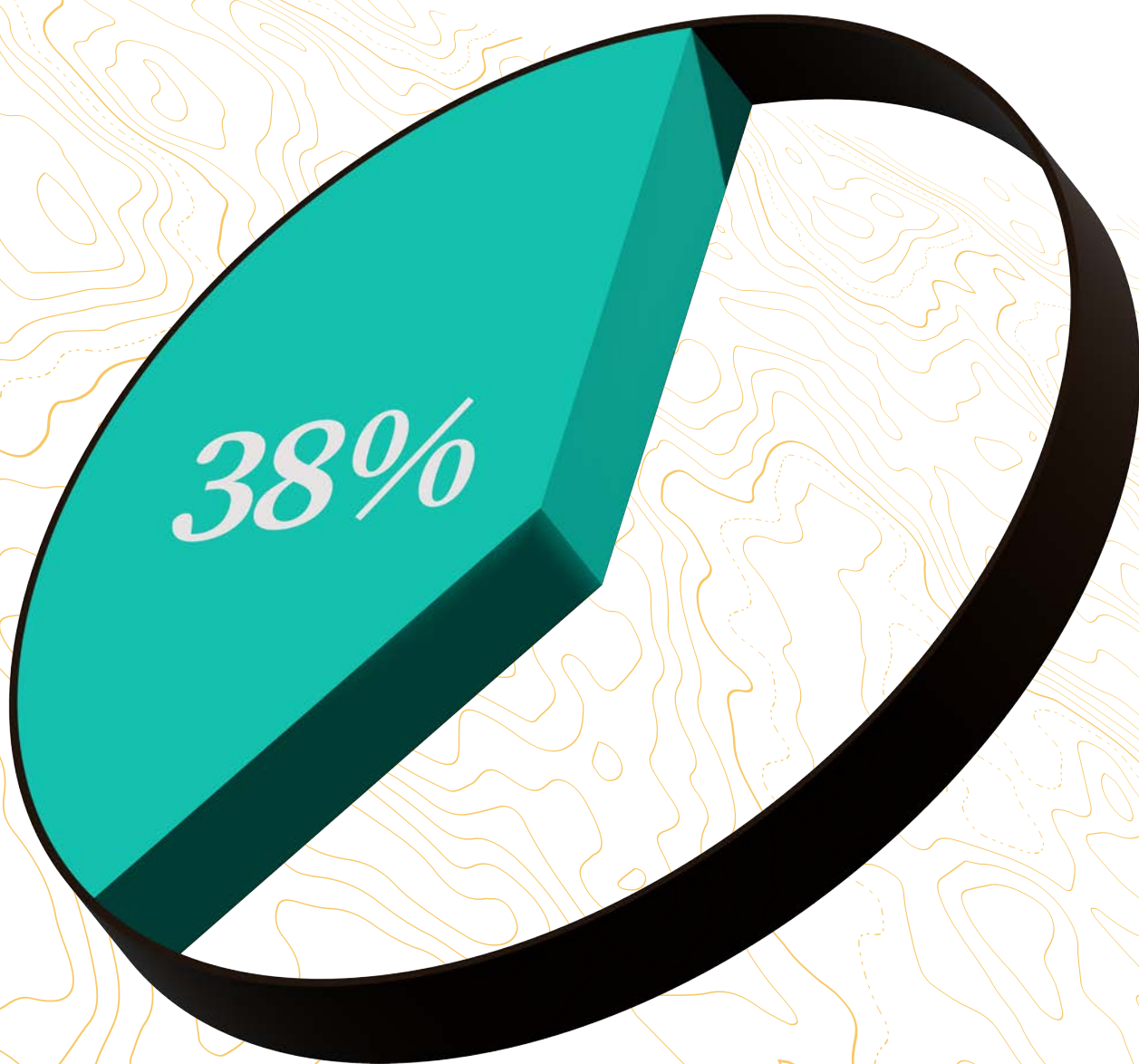
Economic pressure increases the importance of trust

Almost half (49%) said trust becomes significantly more important during periods of economic uncertainty.

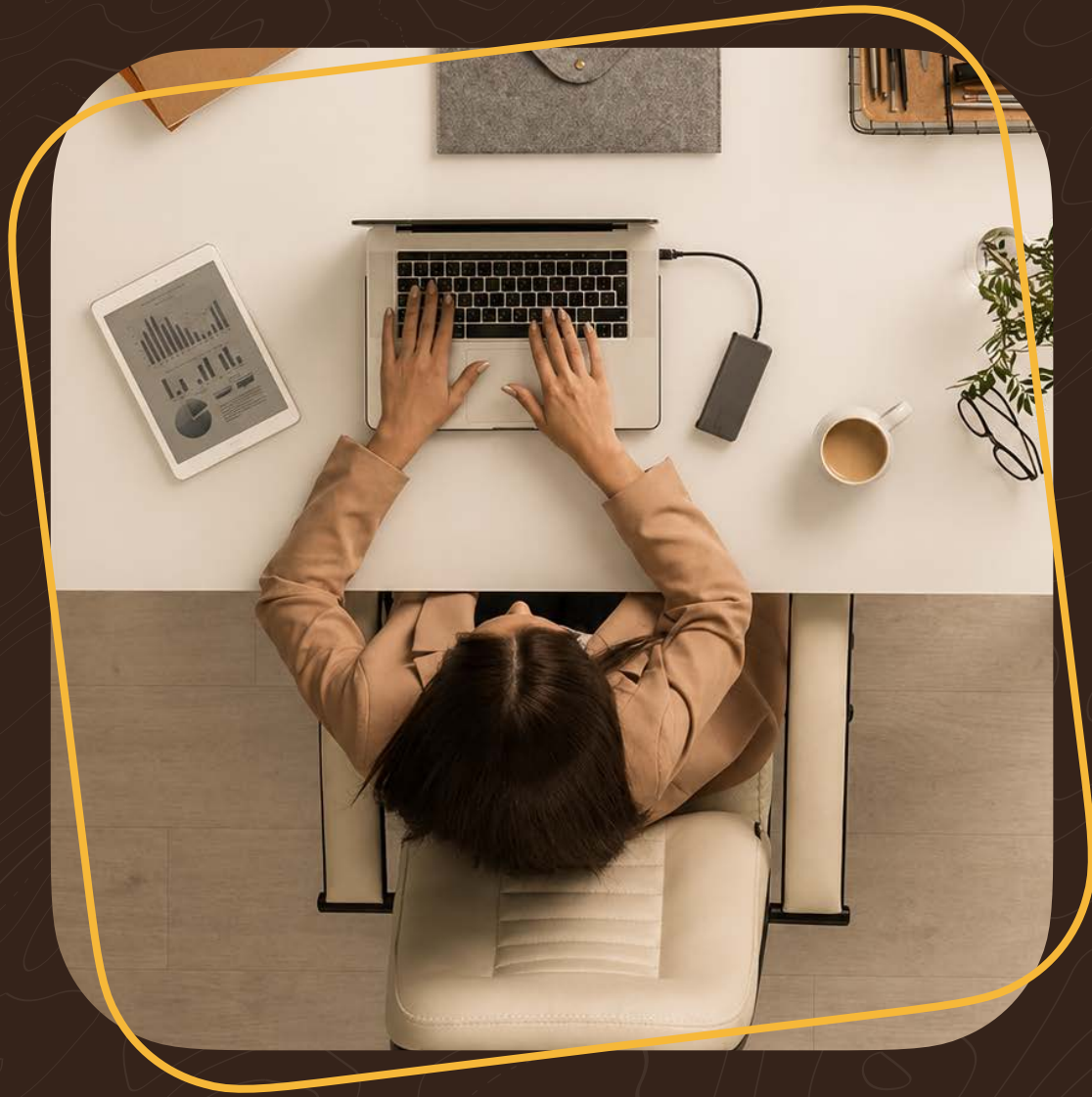
Buyers reward purposeful use of AI

Transparent and authentic use of AI increases trust. Poor implementation or obvious automation damages confidence.

Trust helps smaller firms *compete*



More than a third (38%) said they would actively consider lesser-known suppliers if credibility was established early.



The *data*
and what
it tells us

TRUST OUTRANKS EVERY OTHER FACTOR

Half of buyers placed trust above cost, innovation and delivery. This shows trust is not an intangible sentiment, but the most decisive selection factor in technology procurement. Practically, it means that even strong products and competitive pricing will underperform if commercial credibility is weak.

DISCOVERY IS THE HARDEST HURDLE

28% of buyers said they find it most difficult to trust a vendor at the research stage. This is the moment when websites, credentials and leadership visibility are scrutinised — often before any conversation with sales. If content is thin, pricing is opaque or leadership is invisible, doubt hardens into risk avoidance and opportunities stall.

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"Before I'll even entertain a conversation, I do desktop research. Who else are they working with, case studies. That's the screening before we ever speak."

Derek Kenneally

Chief Product and Technology Officer, Aptitude

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PROOF OVER PROMISES

Buyers rely on tangible signals: transparent pricing (49%), relevant case studies (48%) and compliance credentials (45%). These markers carry more weight than aspirational claims. The practical takeaway: publish pricing principles, make outcomes explicit in case studies and surface certifications and audits prominently — don't have them buried in footers.

ECONOMIC PRESSURE AMPLIFIES THE VALUE OF TRUST

49% said trust becomes much more important in downturns. When organisations face financial pressure, risk tolerance shrinks and credibility outweighs discounting. Vendors that can remove doubt early are preferred over those offering marginal price advantages.

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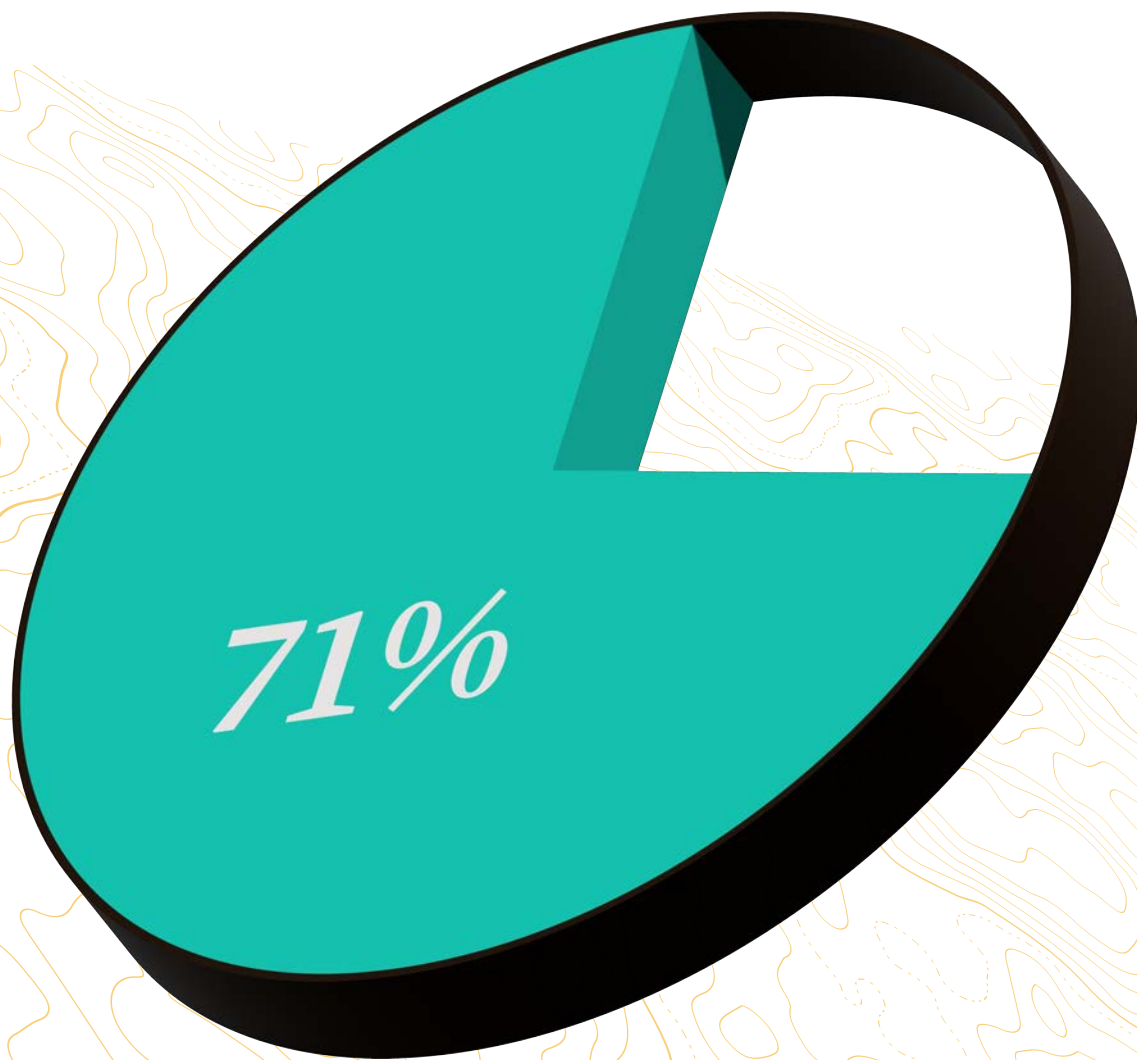
"Making the wrong vendor choice sets you back six to eight months. That risk makes trust absolutely central when money is tight."

Craig Olivier

Group CTO & Co-Founder, Genasys Technologies (Insurance Technology Provider)

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Why buyers *walk* away



Seven in ten (71%) admitted to rejecting a vendor because they did not trust them, even when the solution technically met their needs. The triggers were evasive answers, over-selling and leadership silence. This demonstrates that communication failures can undermine even strong products and services.

“

"Trust is like a bucket: once it's kicked over, it takes a long time to refill. That's why you can't afford to let it spill in the first place."

Craig Olivier

Group CTO & Co-Founder, Genasys Technologies (Insurance Technology Provider)

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"When someone promises information and never follows through or goes quiet once the order is signed, that's a red flag. If they can't even help with implementation, I'd rather step away."

Ian Hoskins

Head of Video Technology, Ctrack (Fleet Management Provider)

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EXTERNAL VALIDATION IS CRITICAL

52% of buyers validate trust through referrals and recommendations. Analyst reports, testimonials, awards and media coverage reinforce these judgments. Trust is conferred externally; it cannot simply be claimed. Independent proof points and strategic communications therefore have a significant impact.

AI'S DOUBLE-EDGED EFFECT

Transparent use of AI is viewed positively by 48% of buyers. But obvious, careless or inauthentic use is seen as manipulative. Buyers look for "human leadership using AI with purpose," not "AI speaking for the brand."

“

"I can spot AI-generated content a mile off, especially on LinkedIn. When vendors use influencers who clearly don't understand the technology they're promoting, it's not credible. The language and tone give it away immediately - and I keep scrolling or delete it."

Derek Kenneally

Chief Product and Technology Officer, Aptitude

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"Every few years, a new buzzword arrives - it was blockchain, now it's AI. Vendors jump on them without purpose and that kills credibility faster than it builds it."

Craig Olivier

Group CTO & Co-Founder, Genasys Technologies (Insurance Technology Provider)

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CHALLENGER BRANDS HAVE AN OPENING

In downturns, 38% of buyers said they would actively consider lesser-known vendors if credibility was clear upfront. Trust levels the playing field: newer brands can win head-to-head if they demonstrate expertise, evidence and transparency earlier than incumbents.

"We won a brief from a NYSE-listed tech company against several global agencies. They chose us because we made trust visible from the pitch. Credibility beats brand recognition."

Liz Churchman

Deputy Managing Director, Emmett & Churchman



The *hidden buyer* challenge

Global research indicates that a significant share of B2B technology deals stall due to misalignment inside the buying group (Source: Edelman–LinkedIn). The technical lead may be convinced, but finance, operations or compliance aren't so sure. Each functions as a "hidden buyer," shaping outcomes without always stepping into the vendor conversation.

The Trust Advantage findings reinforce this: discovery and research (28%) were cited as the most difficult stage to establish trust. This is when hidden buyers - finance, procurement, compliance, legal and operations are forming opinions. If the signals they see are inconsistent, the deal slows or stops.

HOW MISALIGNMENT HAPPENS

Business case vs technical depth. A CFO may accept the ROI narrative, but engineers may not see sufficient architecture detail or integration clarity.

Procurement diligence vs public messaging. Procurement teams may discover pricing inconsistencies or missing certifications that contradict website claims.

Operational risk vs executive vision. Operations may fear disruption not addressed by leadership content, eroding confidence behind the scenes.

“

"I've been that IT guy who gets handed a brochure by the CFO saying 'this is the product we're using.' My answer was simple. No, we're not."

Derek Kenneally

Chief Product and Technology Officer, Aptitude

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HOW ORGANISATIONS CAN
STRENGTHEN TRUST:

Provide two complementary thought-leadership tracks on core subjects: a business-case lens for senior decision-makers and a technical-assurance lens for engineers - both anchored by the same promise.

Put pricing principles in public view (even if you cannot publish rates): how pricing is constructed, what's in/out of scope and how change control works.

Maintain a consistent programme of expert-led content and commentary that helps buyers make informed decisions. Named experts sharing commentary and insights via byline articles, LinkedIn and evidence-led case studies, so stakeholders can see who stands behind the brand.

Equip account teams with consistent messaging so what's said in meetings matches what's seen online.

Hidden buyers may never join the sales call, but they will judge the vendor. Consistency across channels is what turns confidence in one role into confidence across the group.



Sector-specific findings

Defence

- Highly risk-sensitive.
- Trust hinges on compliance credentials, human oversight and visible leadership.
- Defence buyers are cautious about AI and want visible human oversight in its use.

What to prioritise: map certifications to buyer concerns; publish audit cycles; emphasise human accountability in AI narratives.

Cybersecurity & IT *(inc. Insurtech/Fintech)*

- Challenger vendors are welcomed if credibility is established early.
- Responsiveness, transparency and measurable case studies drive trust.
- Analyst recognition and thought leadership accelerate entry.

What to prioritise: speed to first meaningful response, quantified outcomes in customer stories and independent validation (analysts, peer reviews).

Manufacturing

- A significant share of manufacturing buyers have rejected a vendor because of trust concerns - more than a third of respondents.
- Peer referrals and case studies are decisive.
- Cost matters, but only once trust is secured.

What to prioritise: hands-on proof (pilots, on-site trials), references from similar plants and service-level clarity.

Science & Engineering

- Prioritises transparency, authenticity and values alignment.
- Visible experts and authoritative thought leadership trump aggressive sales.

What to prioritise: expert-led content (papers, demos, conference talks) and open documentation that invites scrutiny.

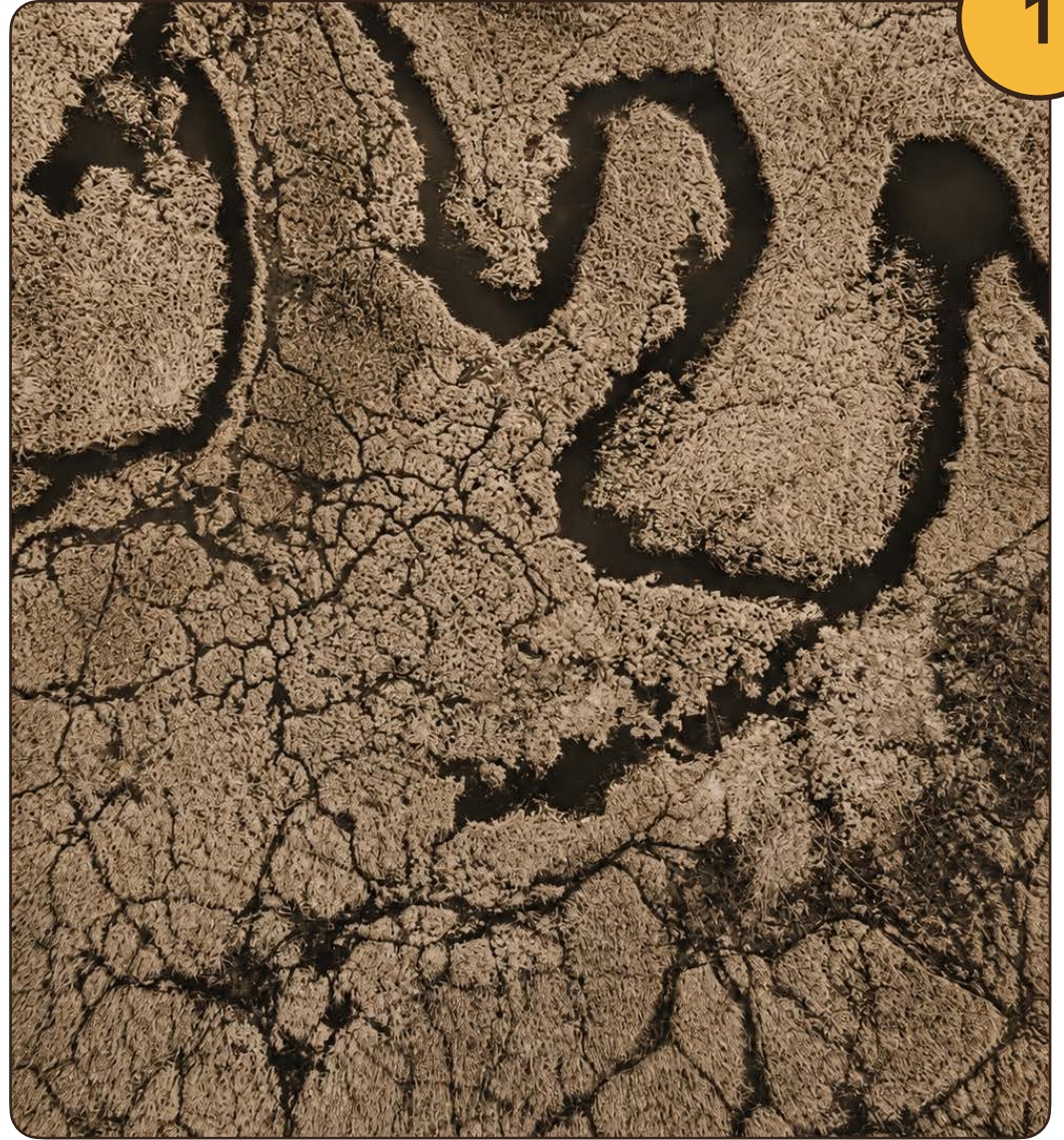


Strategic implications

1

Establish commercial credibility before capability

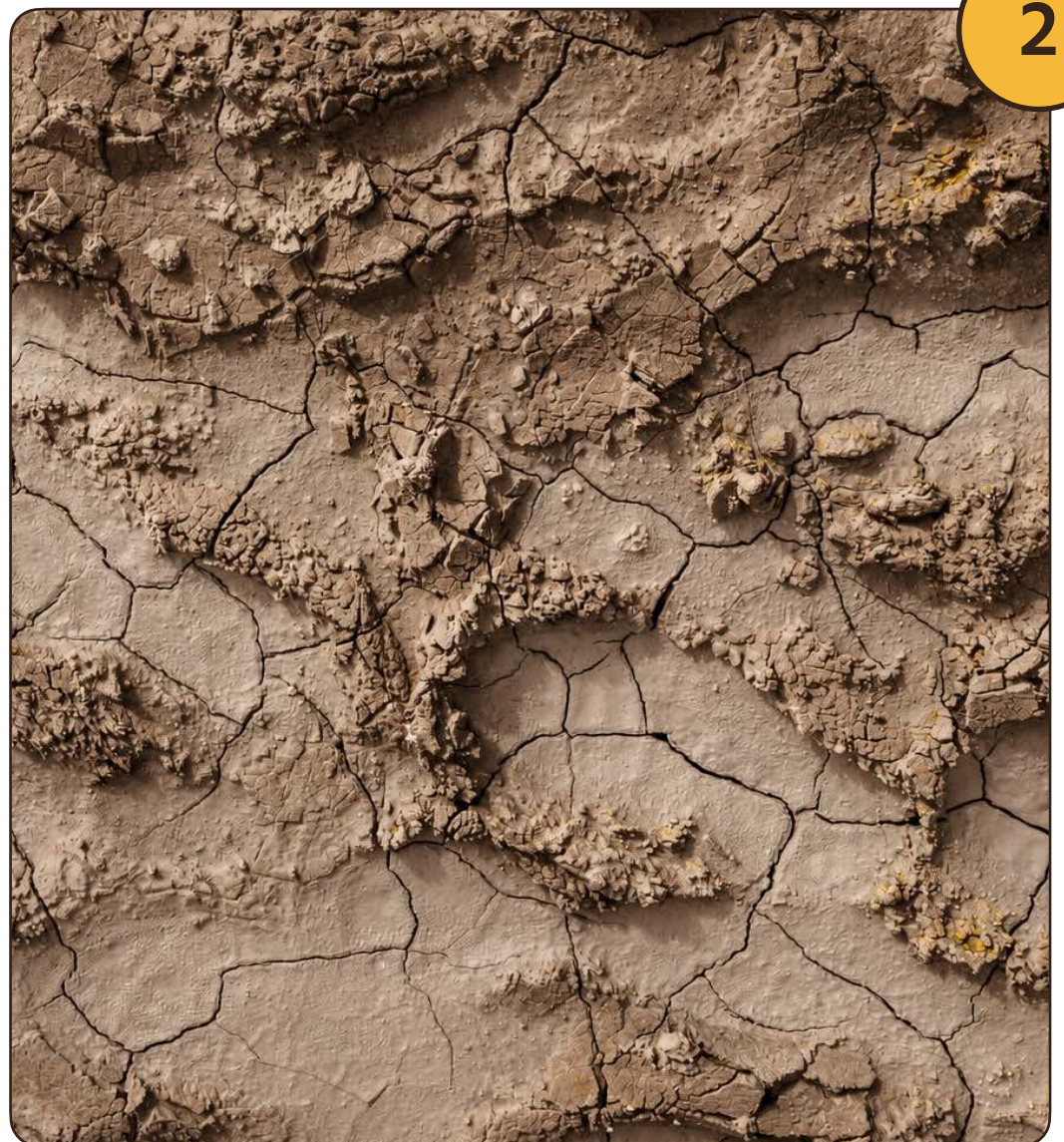
Trust influences supplier selection before buyers assess technical capability. Businesses that communicate expertise clearly and provide evidence early reduce friction in the buying process.



2

Build confidence during research

The research stage is where trust is hardest to establish. Buyers form opinions long before they engage with sales teams, making visibility, proof and consistency essential.



3

Communicate for hidden buyers

Buying decisions often involve stakeholders who never meet the supplier. Content, proof points and messaging must address finance, procurement, compliance and operational concerns as well as technical requirements.



4

Treat trust as a commercial safeguard

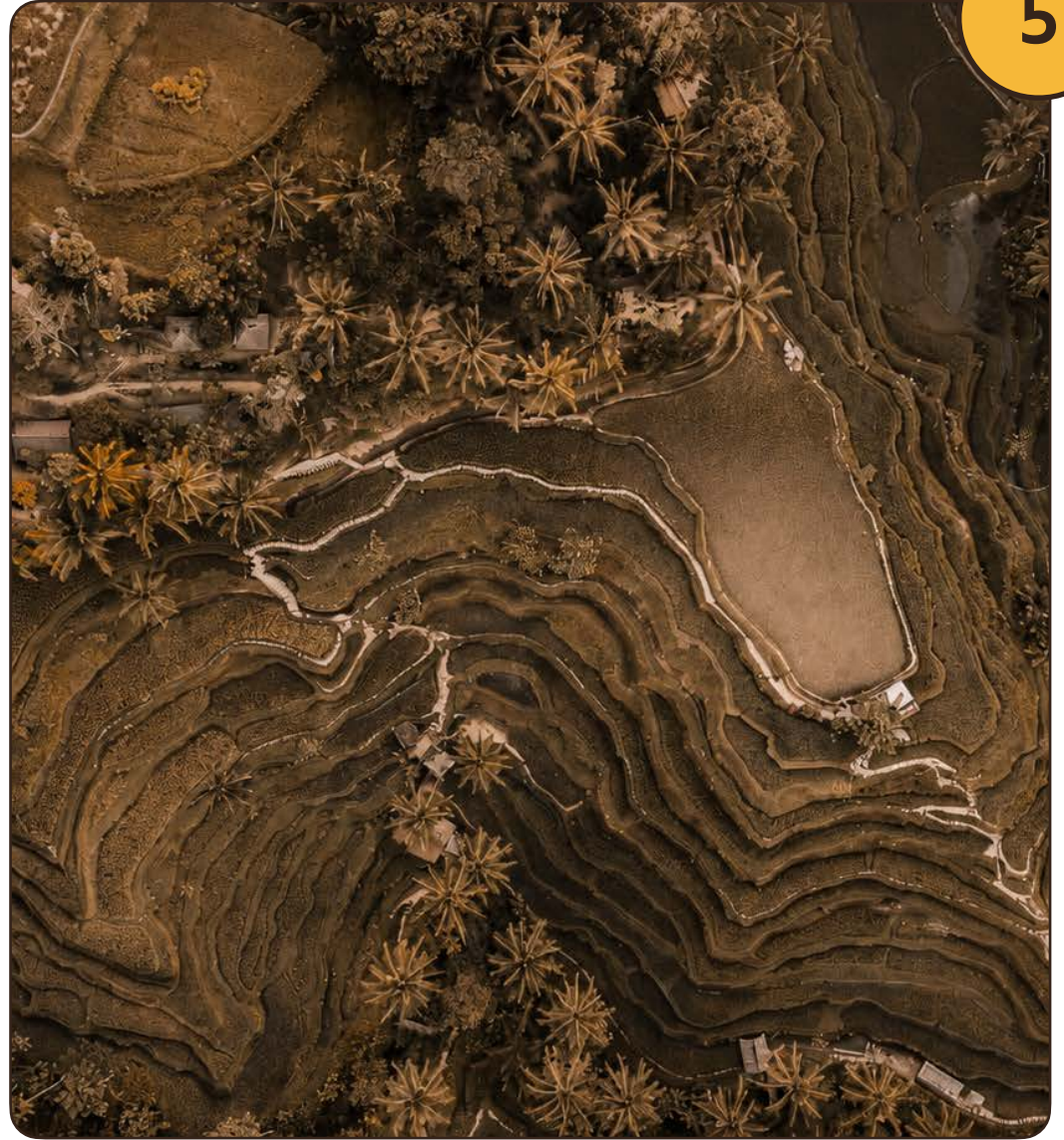
During periods of uncertainty, buyers become more risk-conscious. Credibility and confidence often outweigh price advantages when organisations are making high-stakes decisions.



5

Use AI to support credibility

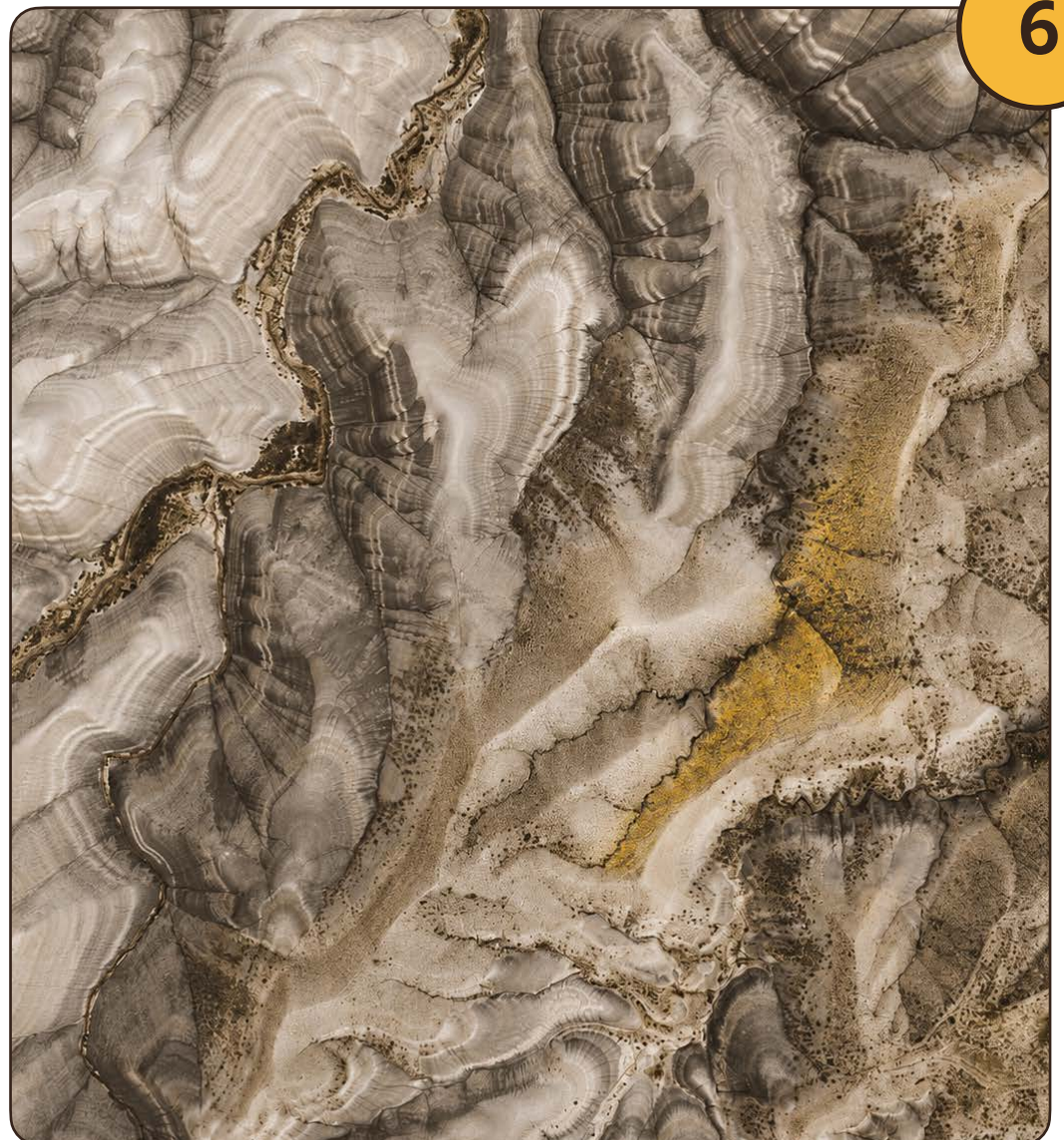
Buyers respond positively to transparent and purposeful use of AI. The most effective organisations use AI to amplify expertise rather than replace authentic human communication.



6

Make it easier to choose you

The findings show that smaller firms can compete successfully when they establish trust early. Clear messaging, visible expertise and strong proof points help buyers feel confident selecting lesser-known suppliers.





Operational trust

1

Publish your proof stack

- Case studies with metrics (before and after, time-to-value, risk reduction).
- Compliance and security credentials, with renewal dates and scope.
- Pricing principles (how you price, what changes pricing, how you govern scope).

2

Make expertise visible

- Name accountable leaders and amplify their expertise through thought leadership; use LinkedIn, Q&As, blogs, technical articles, short explainers and issue response posts.
- Establish a response protocol for sensitive topics (security incident, service variance, AI policy).

3

Build for hidden buyers

- Pair business-case and technical-depth content on key themes.
- Create landing pages that route each stakeholder to what they value (ROI → CFO; controls → Compliance; architecture → Engineering; performance → Ops).

4

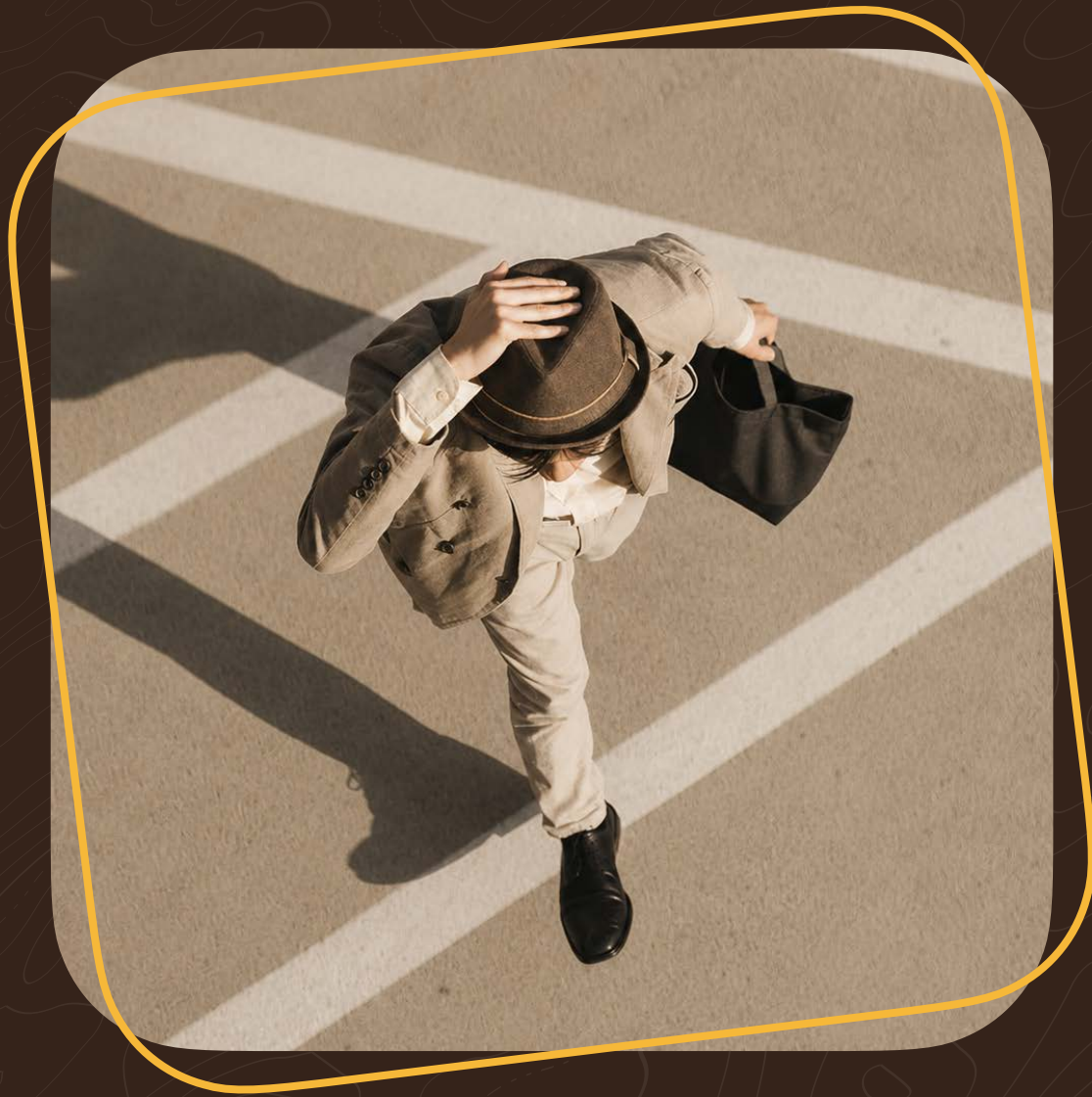
Align human + digital

- Blend rep-free discovery content with expert conversations (Gartner shows rep-free buying often leads to regret; hybrid journeys build confidence).
- Use interactive tools (calculators, diagnostics) to move discovery from passive reading to engaged evaluation.

5

Govern the message

- Use pre-approved messaging so sales, marketing and spokespeople are aligned.
- Maintain a single source of truth for all proof points.



Measuring trust

(and proving impact)

Trust is measurable if you track the right signals:



Early-stage credibility:

% of inbound opportunities that cite case studies, referrals or credentials in discovery calls; branded search growth for “[brand] + pricing/ISO/attestation”.



Stakeholder alignment:

% of opportunities where multiple functions engage pre-proposal (finance, ops, security) and the time lag between first/second stakeholder engagement.



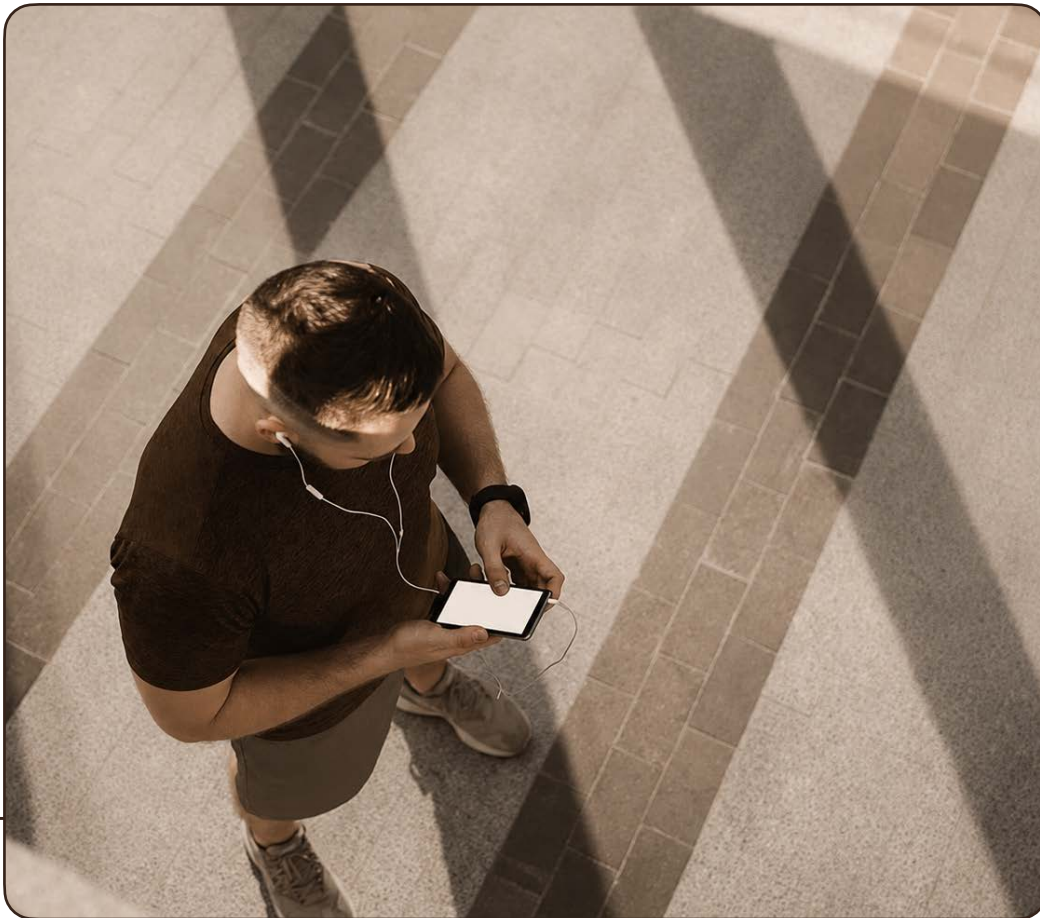
Message consistency:

variance between stated pricing principles and proposal terms; number of “clarify pricing/scope” objections per opportunity.



Proof engagement:

completion rates for case-study pages; time on compliance pages; downloads of technical deep-dives.



Outcome metrics:

stage-to-stage conversion in discovery; cycle-time reduction; win rate differential in opportunities with vs without third-party validation.

These are the signals boards respond to. They convert “trust” from a soft virtue into an accountable growth lever.



Closing thoughts

The Trust Advantage demonstrates that trust is one of the most influential factors in B2B supplier selection.

Buyers assess commercial credibility long before they engage with sales teams. They rely on visible expertise, independent validation, customer evidence and consistent communication to determine whether a supplier deserves consideration.

The findings show that trust influences commercial outcomes, not just reputation.

It affects shortlist inclusion, sales velocity, stakeholder alignment and commercial outcomes.

Organisations that invest in
commercial credibility
reduce uncertainty for buyers.

They make it easier for decision-makers to move forward with confidence.

For growing businesses, this presents a significant opportunity.

The research confirms that commercial credibility helps reduce perceived risk by enabling buyers to develop trust earlier and can help smaller firms compete effectively against larger and better-known competitors. When credibility is established early, organisations are more likely to be shortlisted, engaged and selected on merit.

Trust is not a soft attribute. It influences commercial performance long before a contract is signed.

The businesses that communicate expertise clearly, provide evidence consistently and build confidence throughout the buying journey make themselves easier to choose.

That is the Trust Advantage.