# Adobe Trust Report

The digital economy is personal.

The foundation of digital business is trust.

Today's digitally savvy consumers expect companies to step up as trust leaders in their communities, workplaces, and marketplaces.

From living their brand purpose to respecting customer data to delivering valuable experiences, trust is earned— and broken—with every experience.

And while this new research found that 75 percent of global leaders are facing even more challenges in earning customer trust than before the pandemic, the data also reveals important opportunities for building—and rebuilding trust—and what that means for the bottom line.
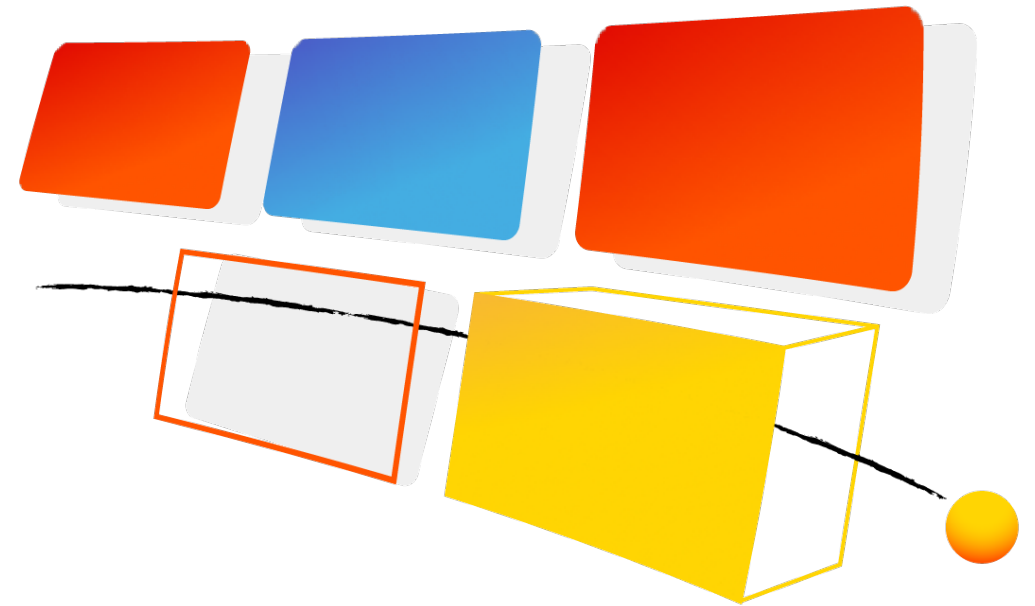
Methodology.

- Adobe partnered with Advanis to survey more than **12,000** consumers and **2,000** senior business leaders at companies with more than **50** employees.

- Our questionnaire was designed to look at trust across multiple dimensions, including brand values, data, customer experience, content, artificial intelligence, and workplace.

- Research focused on **15** countries, including:

  - North America: US.

  - Europe: Belgium, Denmark, France, Germany, Sweden, UK.

  - Asia Pacific: Australia, New Zealand, India, Japan & SEA (Singapore, Philippines, Malaysia & Thailand).

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Key findings.

- Consumers are concerned about their data—and brands still have work to do.

- Personal experiences are a trust multiplier. Trust rises with good personalization and falls with bad.

- Content is still king—and personalized content inspires trust.

- Taking care of employees earns trust across the board.

- When trust is broken, customers lose faith and take action.

- B2B brands struggle to deliver personalized experiences and earn customer trust.

- Consumers put their money where their trust is.

Data and trust.

Consumers want to choose how companies use their data.

- **81%** of consumers say having choice about how companies use their data is important.

- **48%** say it's VERY important.

Too many brands make it hard for consumers to make choices about their data.

29% of consumers say brands still make it too complicated to protect, understand, and choose how their data is being used.

How important consumers say it is for companies to give them choice about how their data is used

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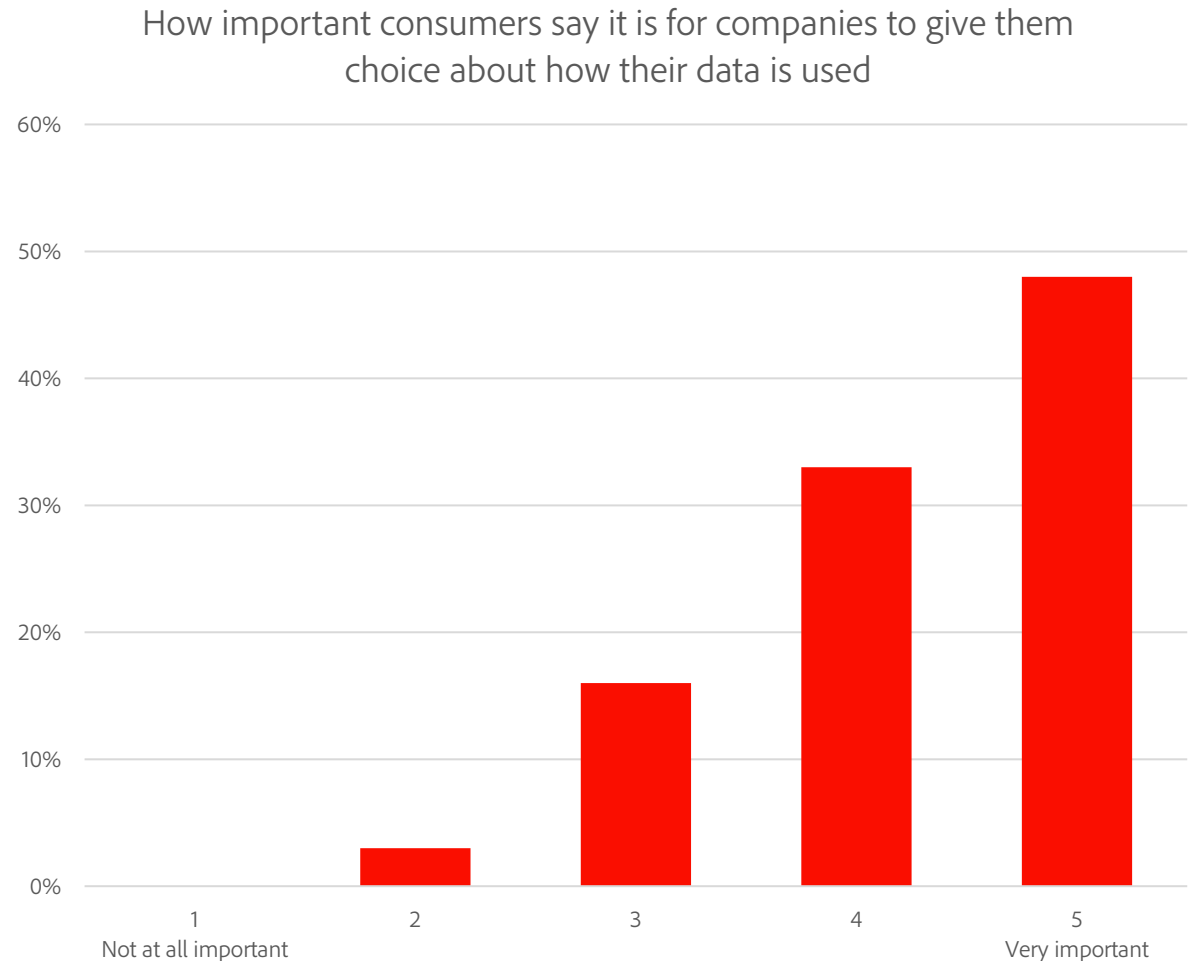
Consumers worry about how brands are using their data.

- **79%** of consumers are concerned about how companies are using their data.

- **34%** are VERY concerned.

Degree of consumer concern about how companies are using their data

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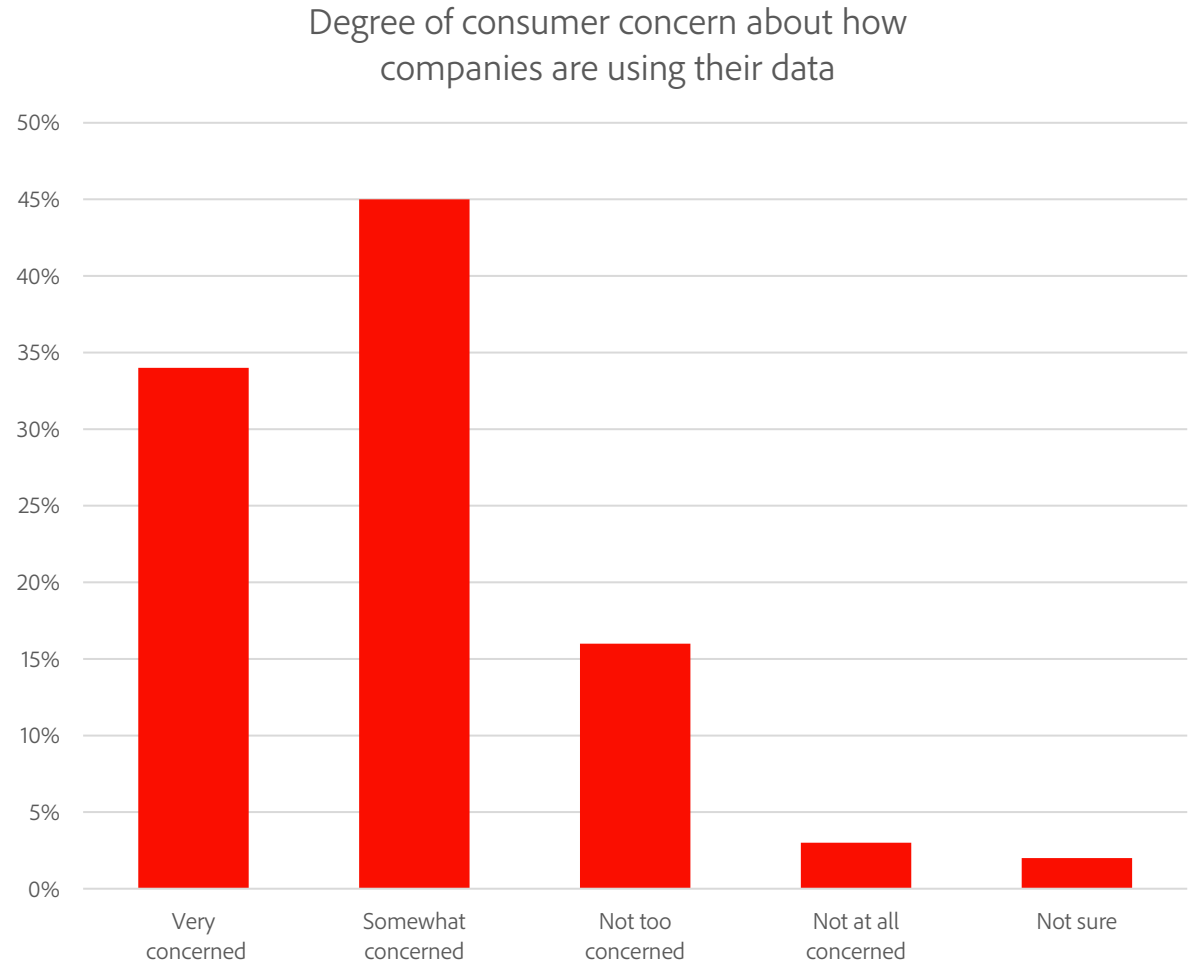
Brands aren't prioritizing data practices most critical to delivering safe, personal experiences that customers value.

Only **41%** of executives say having strong data privacy and governance processes is a top priority for their companies.

Other areas critical to delivering more personal customer experiences are ranked even lower by executives:
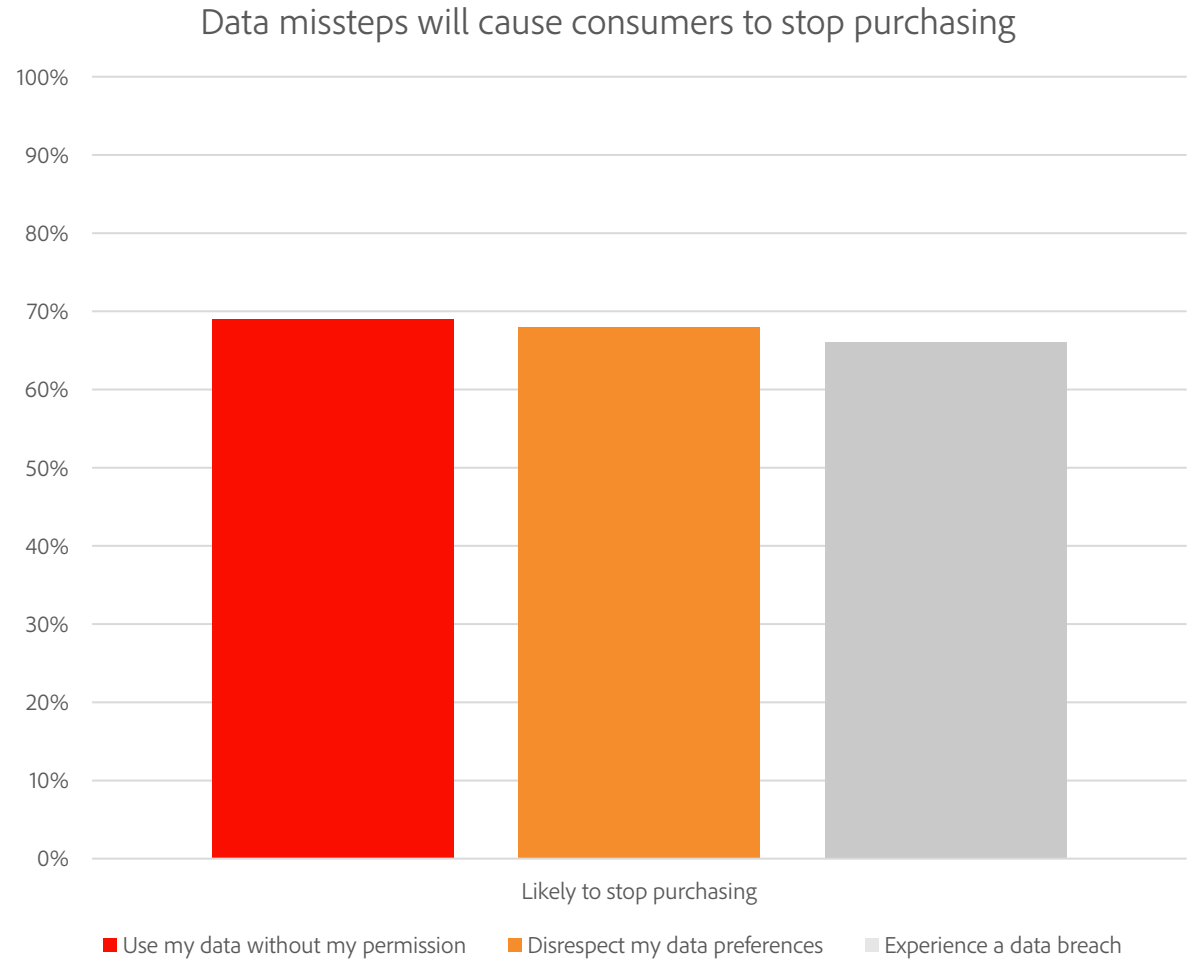
- **33%** say that using real-time customer data is a top priority.

- **13%** say that both *integrating customer data into a single view* and *leveraging AI to provide better CX* are top priorities.

Number of executives who say data practices are a top priority for earning customer trust

Data privacy and governance failures damage consumer trust.

Customers will stop buying if companies:

- Use their data without permission (**69%**)

- Disrespect their data preferences (**68%**)

- Experience a data breach (**66%**)

Data missteps will cause consumers to stop purchasing

Likely to stop purchasing

■ Use my data without my permission   ■ Disrespect my data preferences   ■ Experience a data breach

Brands and consumers disagree on the value of sharing data.

- **71%** of executive leaders agree that the benefits customers receive from companies collecting data about them outweigh the potential risks.

- Only **31%** of consumers agree that the potential benefits outweigh the risks.

Personal customer experiences inspire trust.

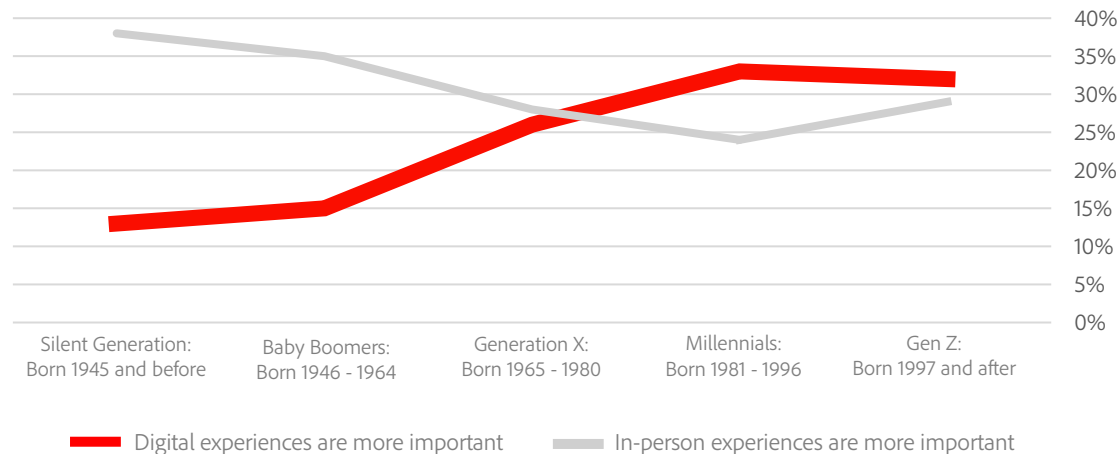# Digital experiences are critical to building trust with consumers.

- Consumers overall say that both in-person and digital experiences are about equally important to building trust.

- For younger consumers (Gen Z and Millennials), digital experiences are MORE important than in-person experiences.

Experiences most critical to trust
(consumers overall)
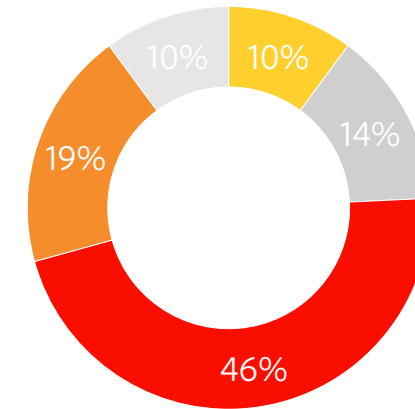
- 🟨 Digital experiences are much more important than in-person experiences
- ⬜ Digital experiences are somewhat more important than in-person experiences
- 🟥 In-person and digital experiences are both important in gaining my trust
- 🟧 In-person experiences are somewhat more important than digital experiences to gaining my trust
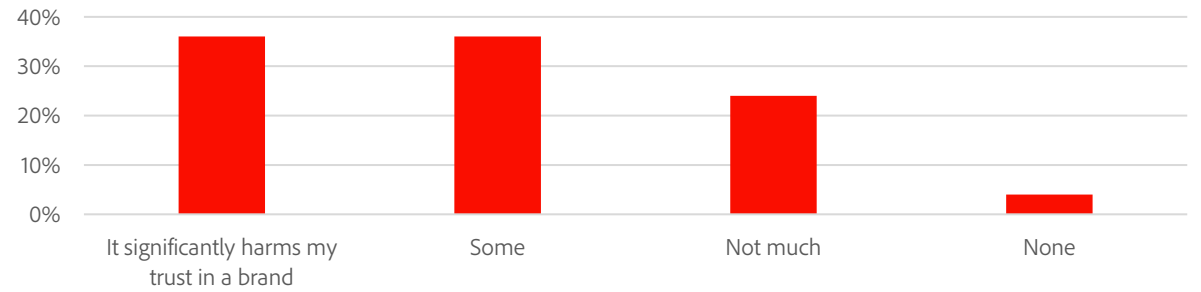- ⬜ In-person experiences are much more important than digital experiences to gaining my trust

How the generations think about in-person vs. digital brand experiences

Silent Generation: Born 1945 and before	Baby Boomers: Born 1946 - 1964	Generation X: Born 1965 - 1980	Millennials: Born 1981 - 1996	Gen Z: Born 1997 and after

— Digital experiences are more important   — In-person experiences are more important
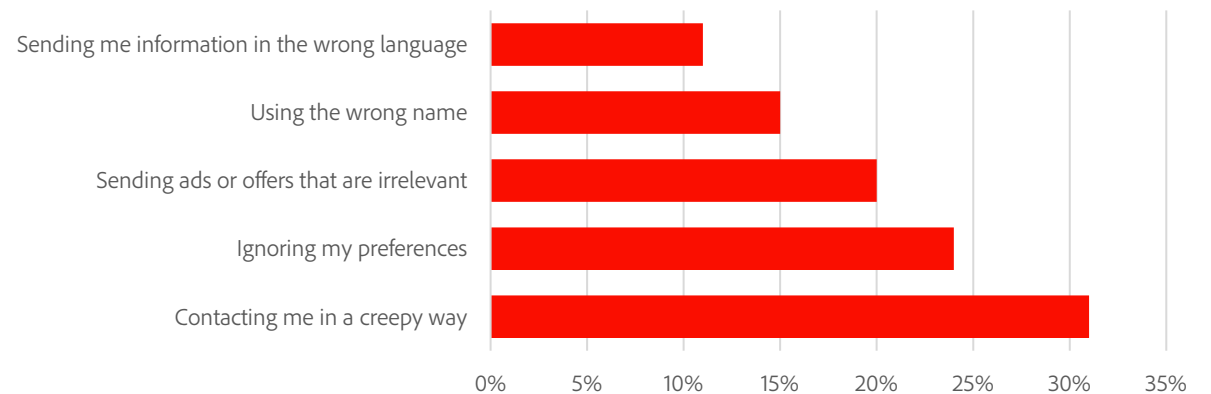
Poor personalization harms consumer trust.

- Consumers say the personalization mistake most destructive to trust is "contacting me in a creepy way."

- 72% of consumers say "bad" personalization decreases their trust in brands, with more than 1/3 (36%) saying it significantly harms their trust.

- More than half of consumers (**58%**) will stop purchasing from a brand that doesn't provide personal experiences they value.

How consumers say a "bad" personalized experience erodes trust

It significantly harms my trust in a brand	36%
Some	36%
Not much	24%
None	~4%

Examples of "bad" personalization that can harm their trust in brands

Sending me information in the wrong language	11%
Using the wrong name	15%
Sending ads or offers that are irrelevant	20%
Ignoring my preferences	24%
Contacting me in a creepy way	31%

Consumers trust brands that show empathy.

- **76%** of consumers think it's important for brands to demonstrate empathy by showing they can see things from the consumer's perspective, understand their frustrations and know what's really important to them.

  - **33%** say it's VERY important.

  - Only **3%** say it's not important at all.

- **88%** of brands say it's important to show empathy for their customers.

As a customer, how important is it for brands to show empathy for you?

3%

21%

33%

43%
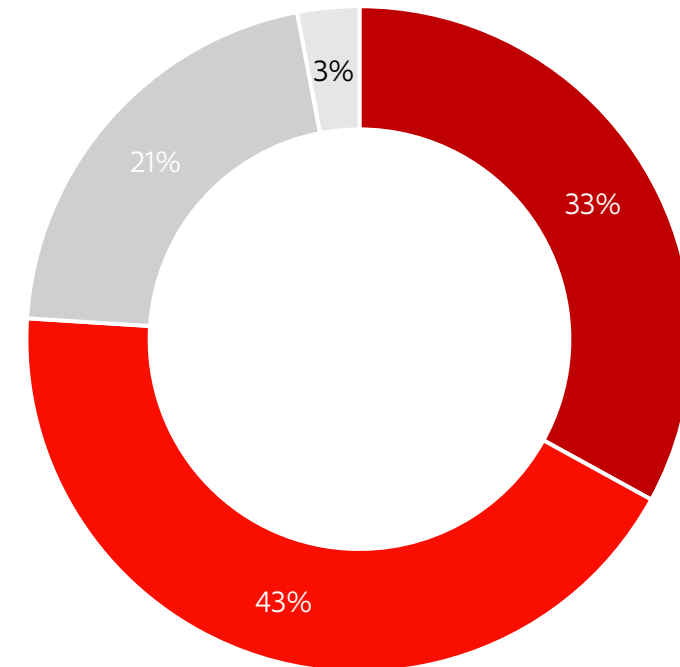
■ Very important ■ Important ■ Not very important ■ Not important at all

Making content personal and trustworthy.

When it comes to trusted digital experiences, content is core to the experience.

- **71%** of consumers say that relevant content delivered at the right time and place boosts their trust.

- **77%** of Gen Z and Millennial consumers say relevant, personalized content increases their trust. **29%** say it increases their trust "a lot."
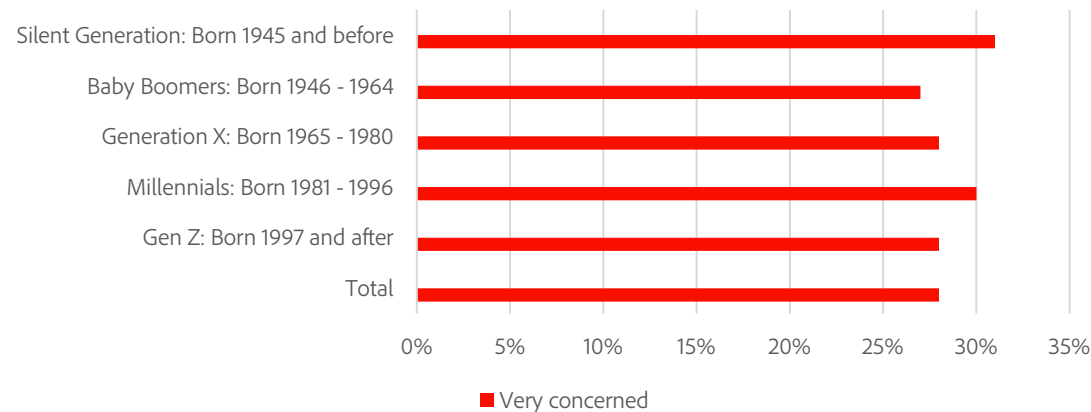
% consumers who said personalized content delivered at the right time increases their trust in brands
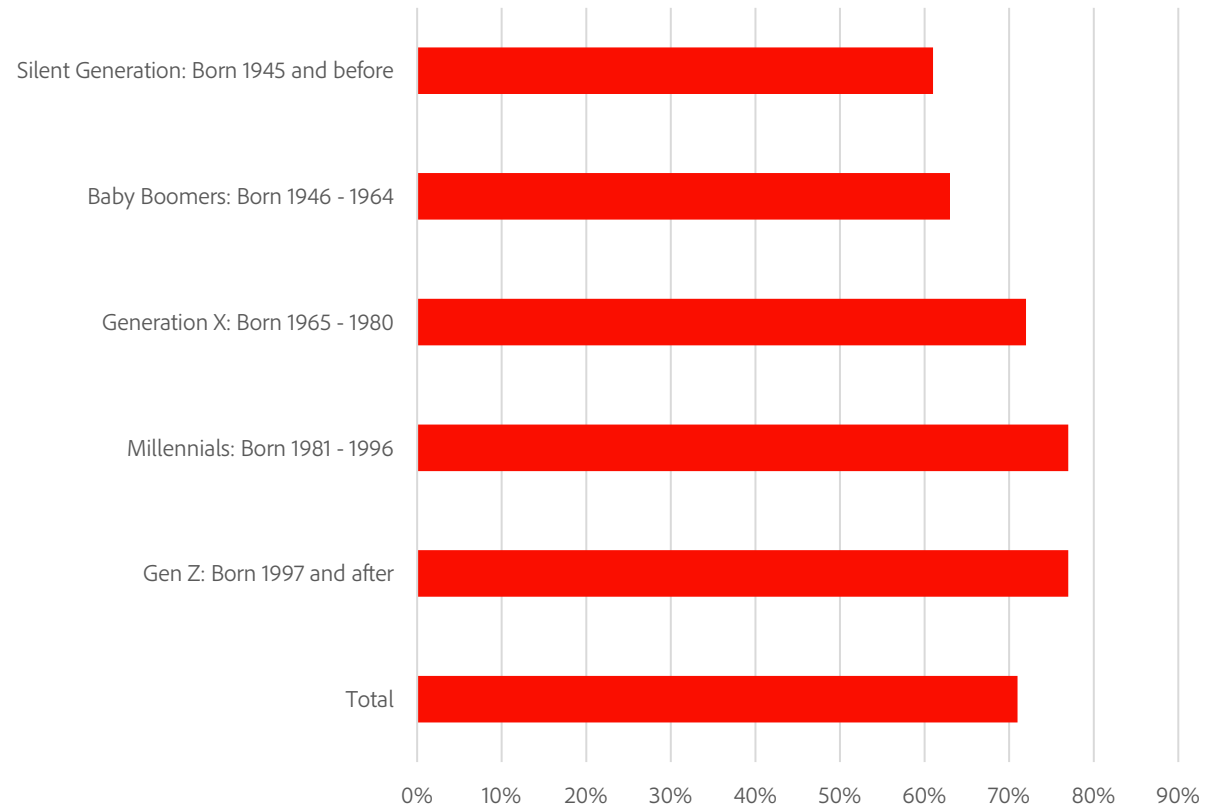
Consumers need assurance that content is trustworthy.

- **73%** of consumers are concerned about whether online content is trustworthy.

- **28%** are VERY concerned.

- Consumers across generations agree that this is an important issue.

% consumers who are concerned about the trustworthiness of online content

% of consumers who are VERY concerned about the trustworthiness of online content
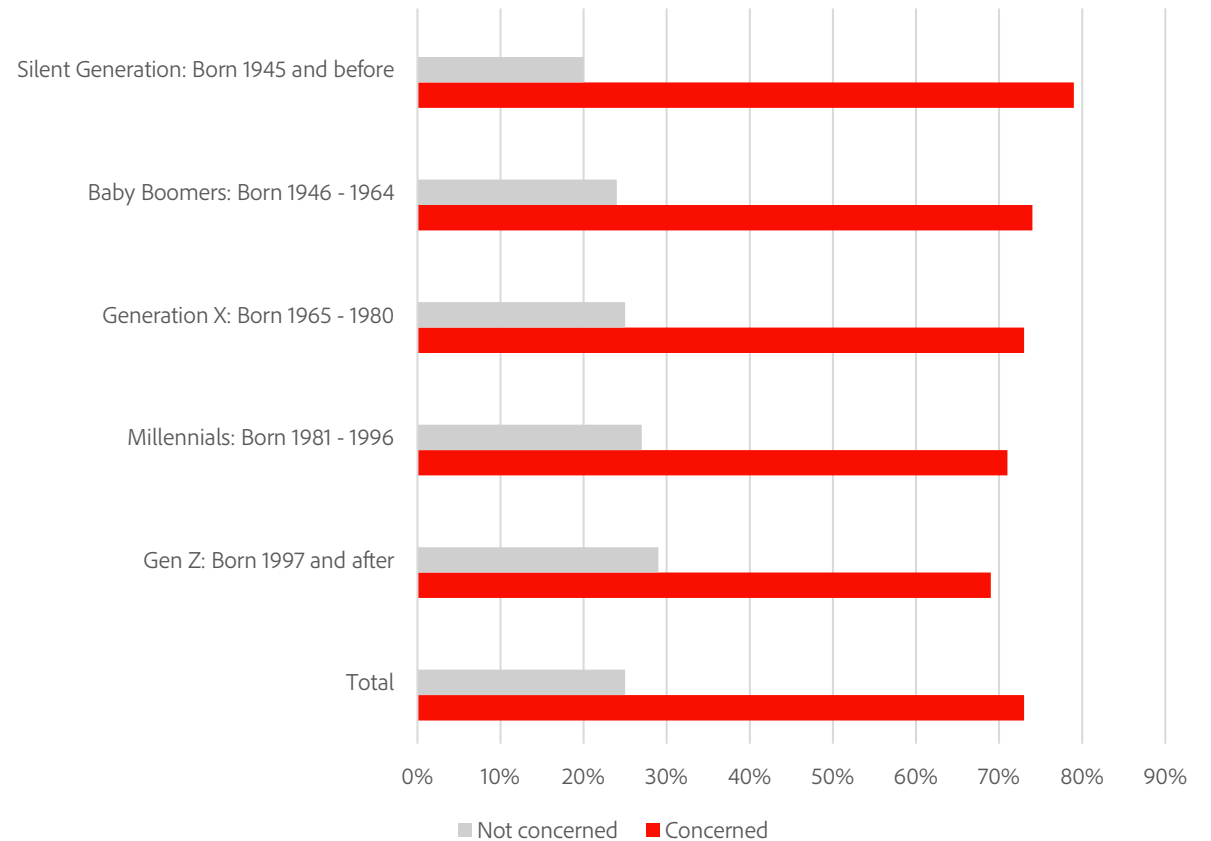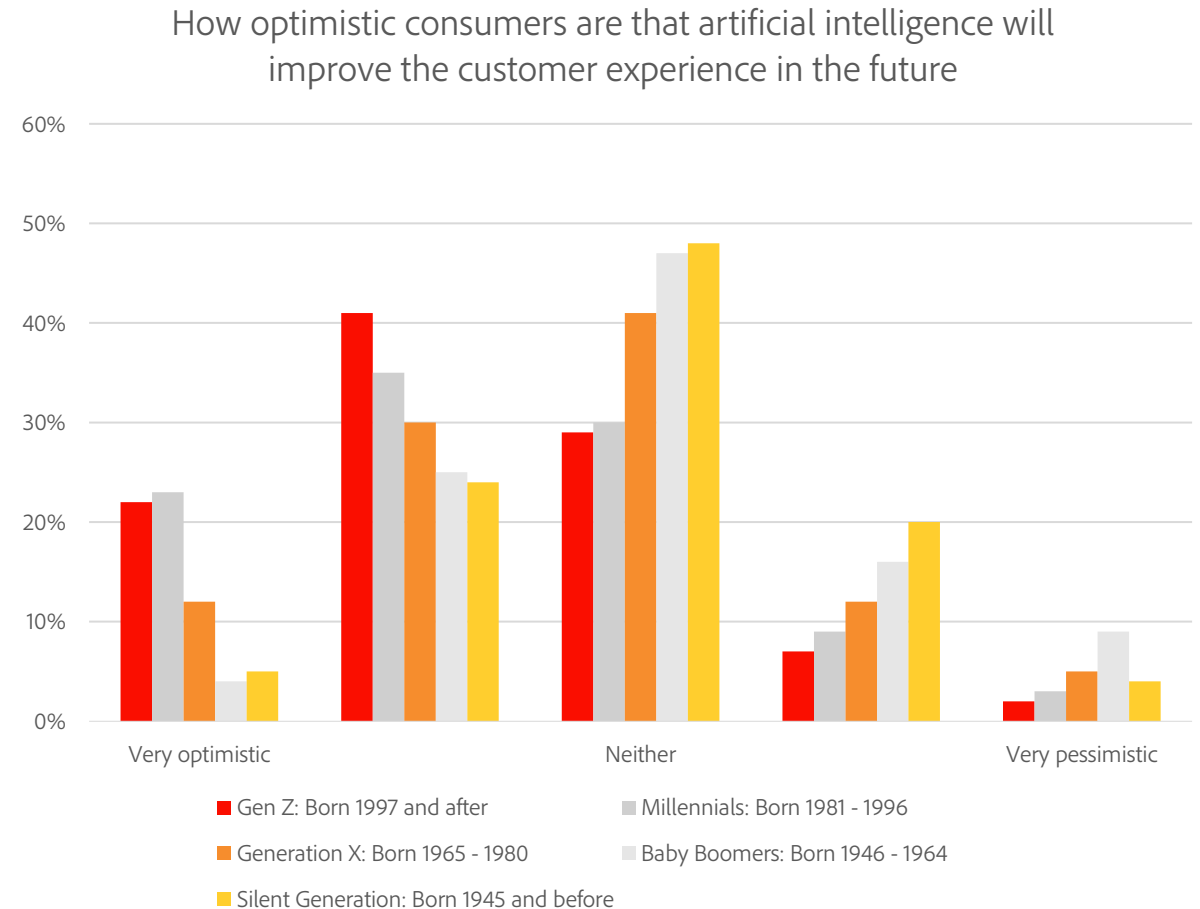
Technology is critical to earning customer trust.

Consumers trust bands that use tech to personalize experiences.

- Overall, **56%** of consumers say they're more likely to trust brands that use technology to deliver personalized experiences.

- This includes **70%** of Gen Z consumers and **66%** of Millennials.

% of consumers who say they're more likely to trust brands that use technology to personalize experiences
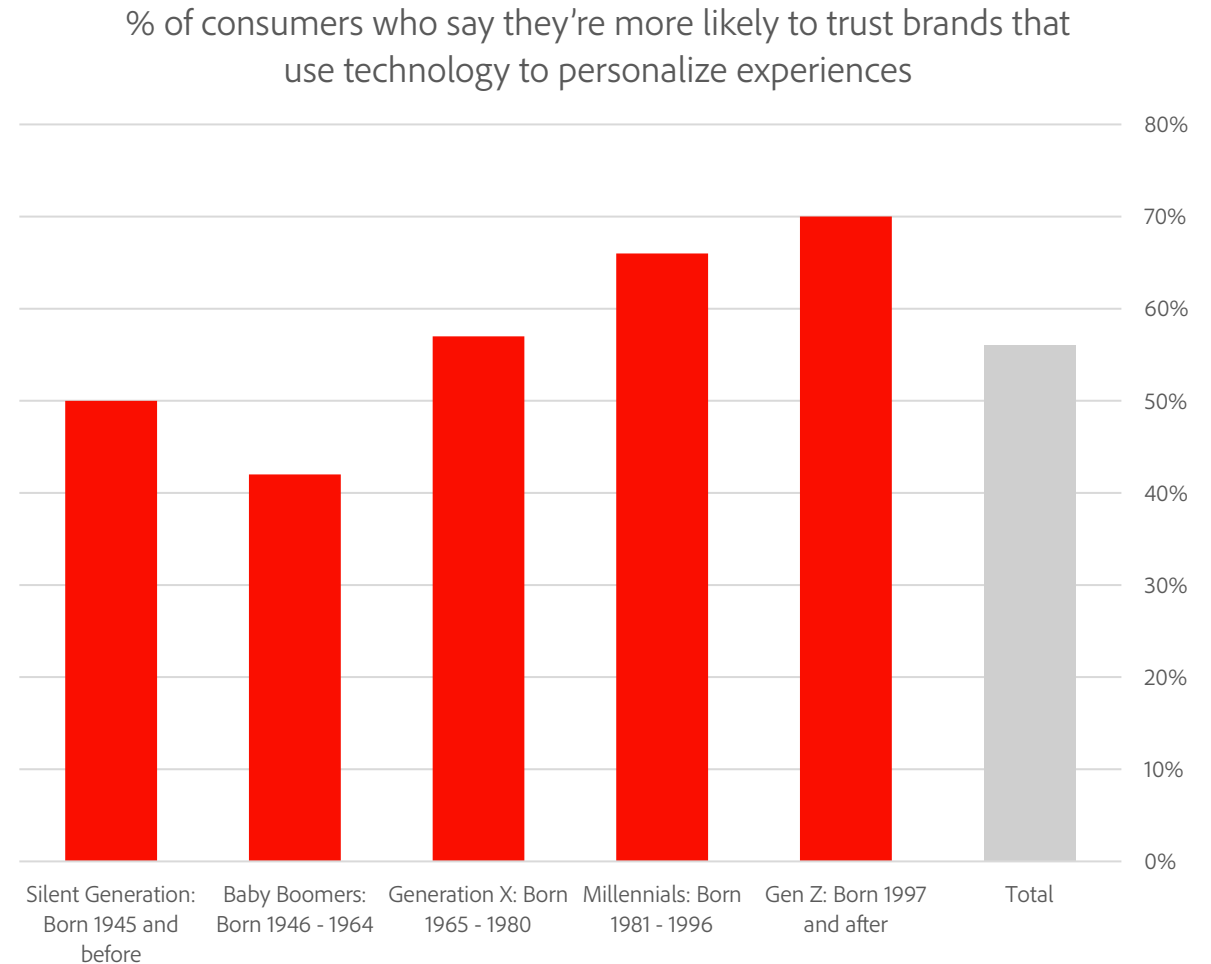
Consumers trust artificial intelligence to make their experience more valuable.

- **72%** of consumers say they trust artificial intelligence (AI) to improve their customer experiences to at least some degree.

- **45%** of consumers are optimistic that AI will improve their customer experiences even more in the future.

- Gen Z is even more optimistic at **63%**.

How optimistic consumers are that artificial intelligence will improve the customer experience in the future

Legend:
- Gen Z: Born 1997 and after
- Millennials: Born 1981 - 1996
- Generation X: Born 1965 - 1980
- Baby Boomers: Born 1946 - 1964
- Silent Generation: Born 1945 and before

Brands recognize the promise of artificial intelligence, but AI bias is a concern.

- While AI is gaining trust consumer, brands/leaders must be vigilant to ensure it's implemented ethically.

- **89%** of brands trust that AI is making their customers' experiences better, but **65%** have also observed AI-driven bias.

How executives feel about the potential of AI to improve the customer experience
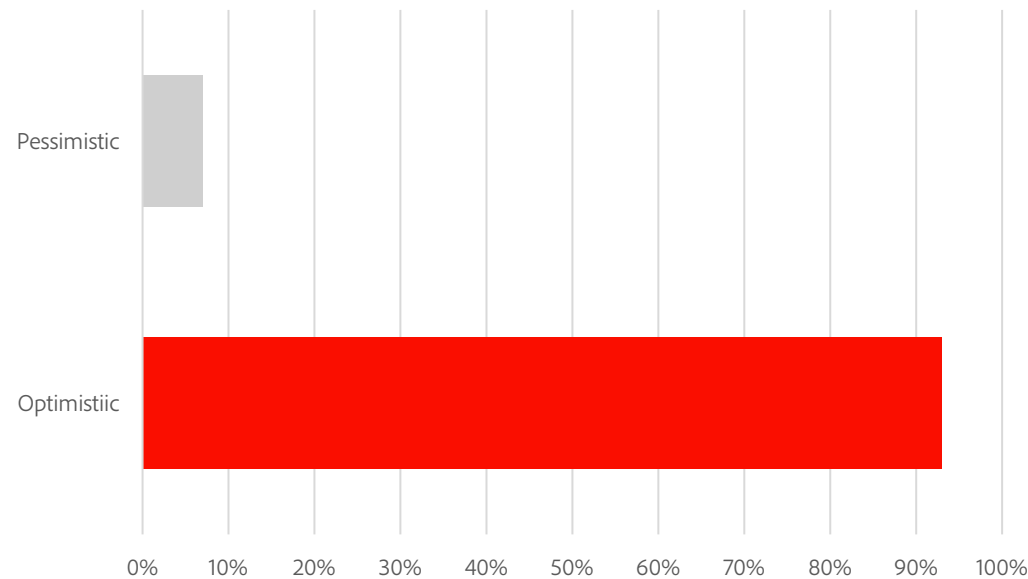
% of executives who have observed AI-driven bias in their own companies
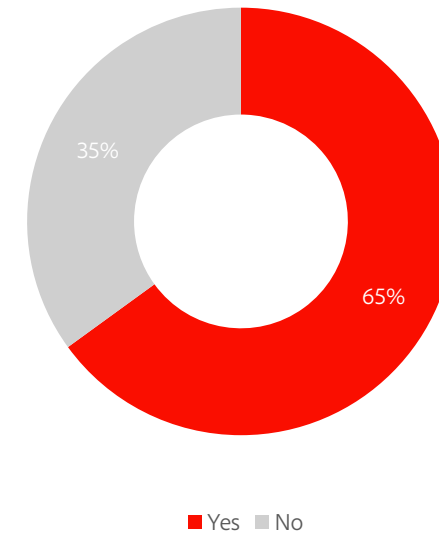
Brand values and trust.

Trust begins with brands practicing the values they preach.

- The single most important thing brands can do to earn their employees' trust is to practice what they preach.

- Also earn employee trust by providing personal and professional support.

- Employees want integrity and empathy from their employers.

How brand actions influence employee trust

■ It doesn't impact how much I trust my employer   ■ It increases how much I trust my employer
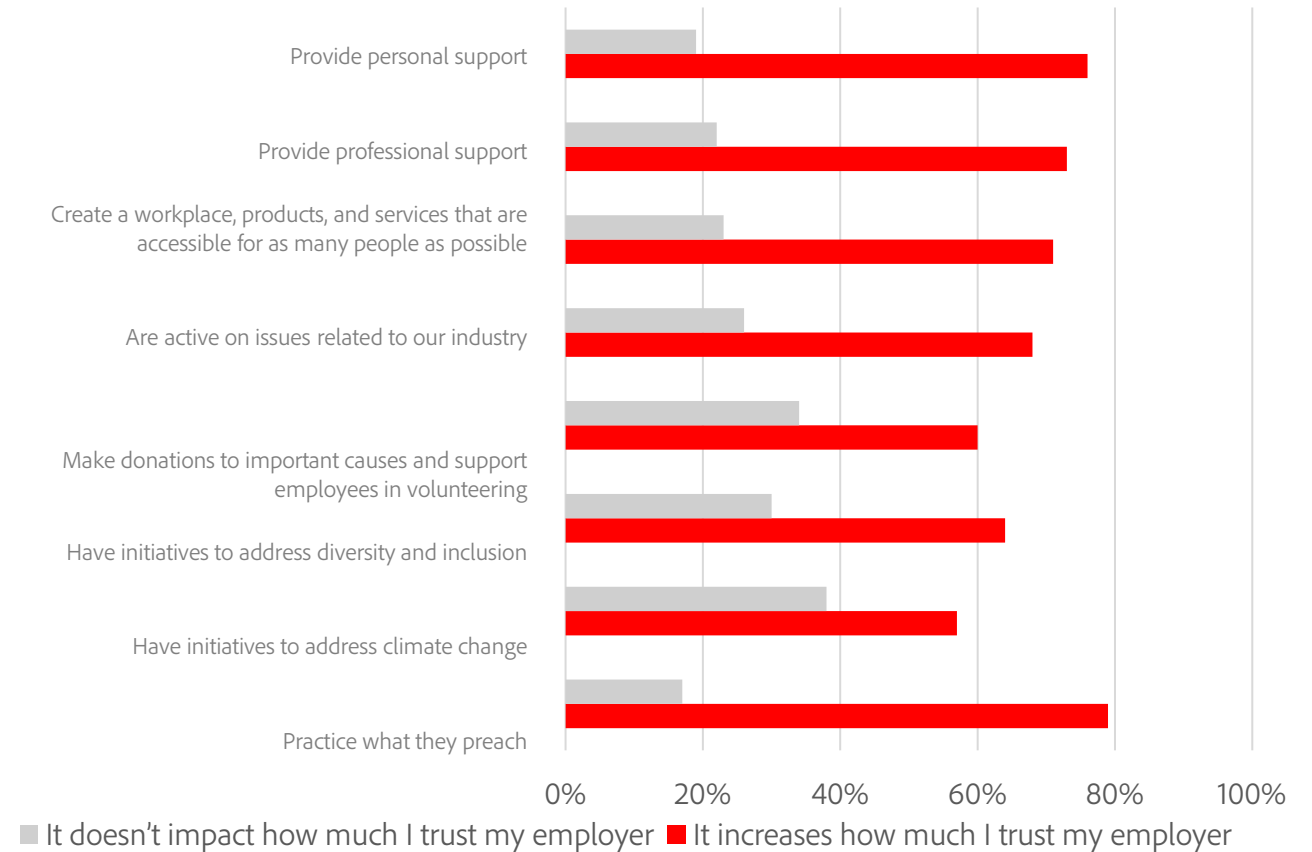
B2B brands and trust.

B2B brands have both experience and trust challenges.

- **61%** of the people we surveyed who make purchasing decisions at work say that their B2C buying experiences are better than their B2B experiences.

- Only **7%** say their B2B experiences are better than B2C experiences.

- **42%** say B2C brands are more trustworthy.

- **9%** say they trust B2B brands more.
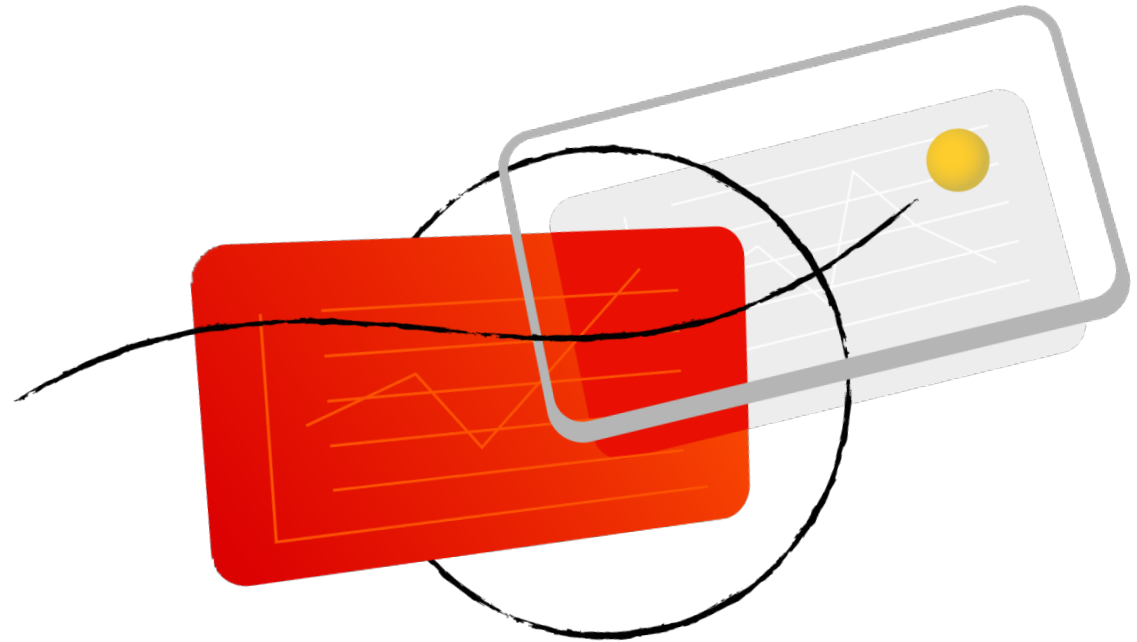
Government and trust.

Governments have trust opportunities.

- Consumers have slightly more trust in governments than brands when it comes to their personal data.

- **53%** of consumers believe governments are making good faith efforts to protect their data and provide transparency and choice around its use.

- **30%** say governments still make it too difficult to protect, understand, and choose how their data is being used.

- **28%** of consumers don't trust either their local or federal/central governments to use their personal data respectfully (they trust/distrust both fed and local equally).

When trust is lost.

Customers will walk away when trust is broken.

More than half (**55%**) of consumers say that once a company has violated their trust they will NEVER give it their business again.

Gen Z is least forgiving, with **60%** saying they will never purchase again once trust is broken.

How brands can regain trust.

Consumers say brands can begin to regain lost trust by:

- Keeping data safe (**84%**)

- Providing consumers with transparency and control over how their data is used (**84%**)

- Apologizing (**76%**)

- Treating their employees well (**76%**)

- Providing personal experiences (**69%**)

- Demonstrating strong social responsibility (**68%**)

Trust and the bottom line.

What trust means to brands' bottom line.

Consumers will spend more with most trusted brands.

- **44%** will spend at least **$500/year.**

- **29%** will spend more than **$1000/year.**

- Younger consumers (Gen Z and Millennials) are more likely to spend **$1000+** with most trusted brands.

Penalties for untrustworthy brands.

- **55%** of consumers say that once a company has violated their trust they will NEVER give them their business again.

- **60%** of Gen Z will never purchase again.
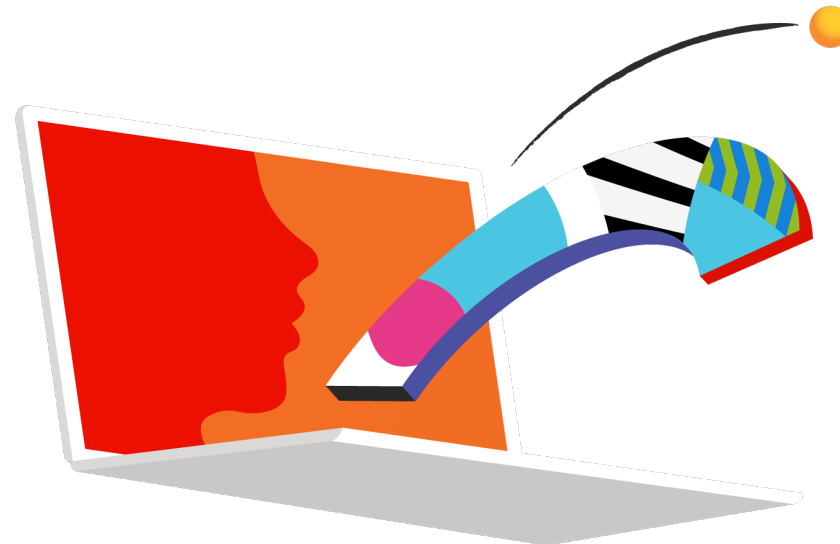
How to take action on trust.

Take action to earn customer trust.

- Customer trust is earned and broken with every experience.

- A strong focus on data care and governance will help brands address a wide variety of high-priority consumer concerns.

- Digital experiences are critical in the consumer trust equation.

- Making experiences personal and personally valuable builds trust.

- Content that is personalized deepens trust.

- Consumers are optimistic AI is improving their experiences—but brands must remain vigilant against bias.

- Brands must practice what they preach—and prioritize the personal and professional wellbeing of their employees.