



#TRUST ADVANTAGE 2025



In collaboration with 3Gem

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B2B^{PR}

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Methodology

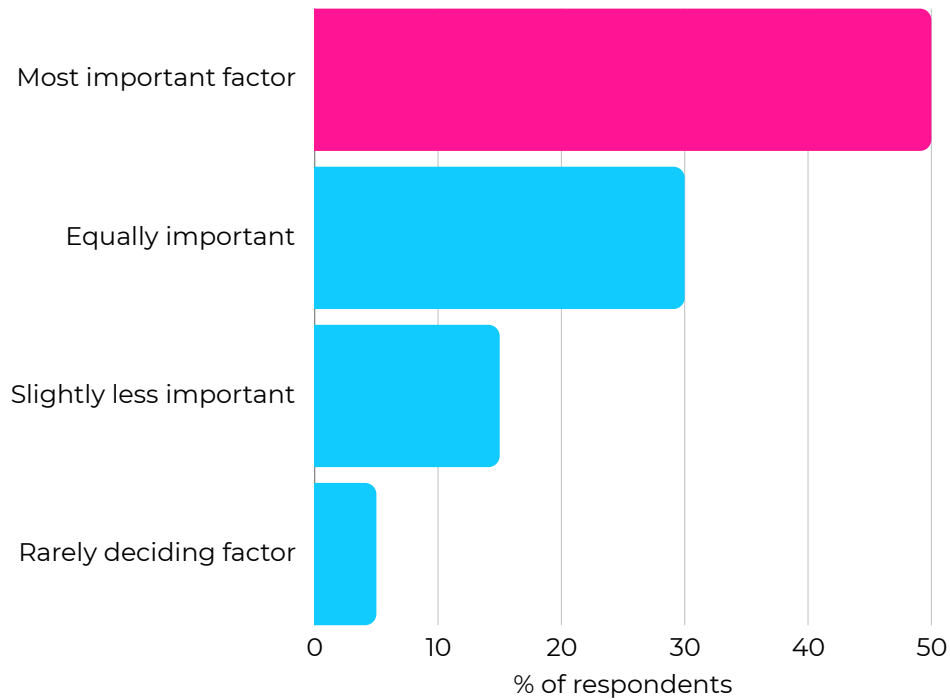
- Survey conducted **August 2025**.
- **200 senior technology buyers** across defence, cybersecurity, IT, manufacturing, and science & engineering.
- Roles included CIOs, CTOs, procurement leads, operations heads, and compliance managers.
- Data analysed at topline and **sector-specific** levels.
- Supplemented by verbatim qualitative responses and secondary research (Edelman–LinkedIn, Gartner, Coleman Parkes).



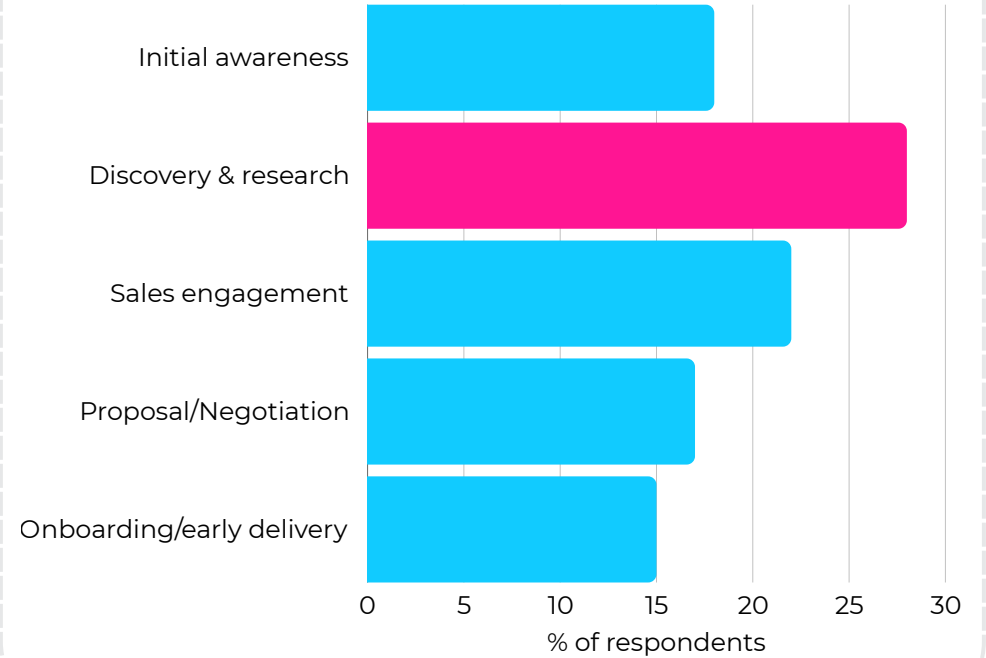
Key findings



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



Stage where **trust** is hardest to build





Contributors



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A big **thank you** to all our contributors including **3Gem** and the **200 senior execs** who took time out of their busy schedules to discuss the impact trust has on their buying decisions.



Introduction

by Lorraine Emmett, Managing Director, EC-PR

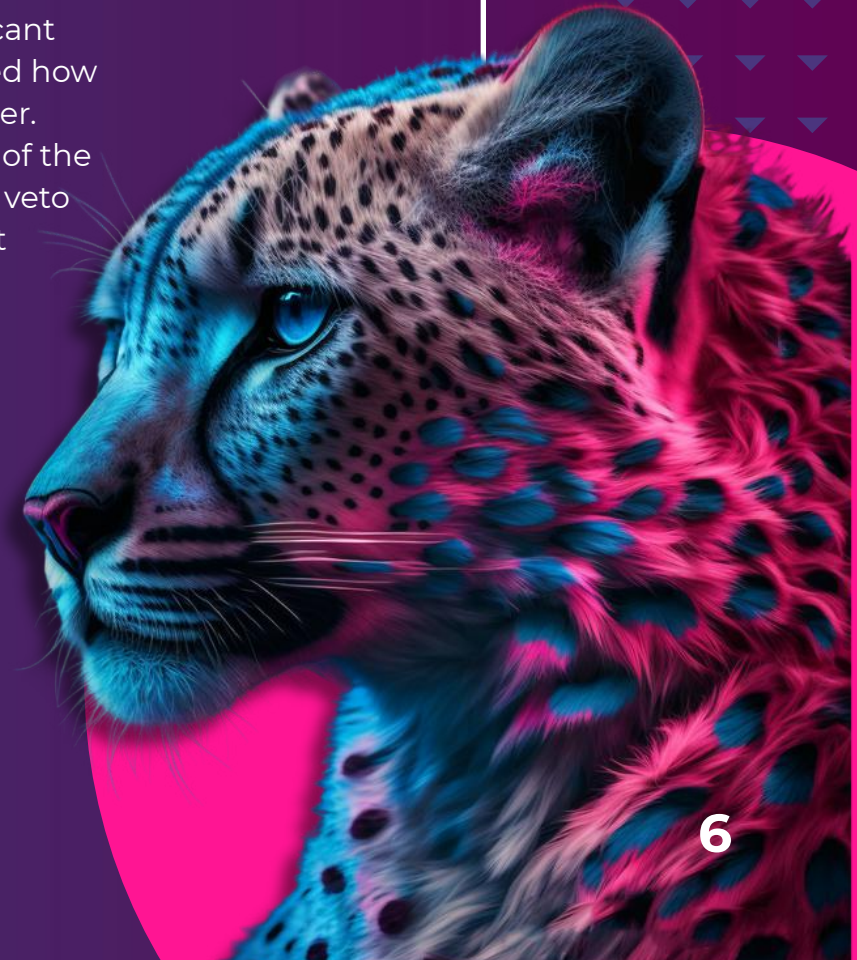
Trust is now a strategy. Discovery is the battleground.

In B2B tech buying, trust is the make-or-break factor and mid-sized vendors feel this pressure most.

2025 has been a landmark year for B2B buying research. Following significant studies from Gartner, Edelman-LinkedIn and Coleman Parkes that revealed how profoundly buying behaviour has evolved, we were compelled to dig deeper. These studies revealed several critical dynamics including the emergence of the "hidden buyer", stakeholders outside the core buying committee who can veto deals without ever joining a sales call and the seismic influence of thought leadership in shaping decisions across entire buying panels.

While this research provided crucial macro insights, it left us asking how these dynamics specifically impact mid-sized tech businesses. Rather than revisit ground already covered, we focused our lens on the role trust plays in winning over hidden buyers and levelling the arena between challengers and enterprise incumbents.

Our research found that **half of senior decision-makers rank trust as the number one factor in vendor selection**, above cost, innovation and delivery. And **almost seven in ten admit they've walked away from a deal** simply because something didn't feel right, even when the product or service technically fit their needs.





What triggers this reaction? Thin content. Opaque pricing. Absent leadership. Over-claiming without proof. These signals break trust early, often before a sales call even begins.

For growth-focused tech firms, that's the new battleground: building credibility in the earliest stages of discovery. Get it right and trust becomes your advantage. Get it wrong and even a brilliant solution won't get traction.

The Trust Advantage decodes how trust is built, signalled and lost in B2B tech buying today and what you can do to embed it into your communications, sales and brand strategy.

This is about shortening cycles, increasing conversions and enabling challenger brands to go head-to-head with enterprise players and win.

Lorraine



Lorraine Emmett,
Managing Director, EC-PR





Foreword

by Vanessa Ashworth

I've seen it too many times: a company makes a high-stakes buying decision, only to discover the supplier can't deliver what was promised. In B2B, a wrong choice can halt production, compromise service, waste time and budget and damage both the credibility of the brand and the leader who signed it off. A bad decision will put reputations and sometimes careers on the line.

That's why **trust** is not a nice-to-have.
It's a **core driver** for business growth.

Buyers research long before they speak to sales. They form judgements from white papers, case studies, earned media, analyst reports, peer reviews and compelling Thought Leadership that helps buyers make better decisions. If those signals are missing or inconsistent, doubt takes hold and your funnel dries up.

On the flip side, once trust is established and the buyer feels 'safe', the sales cycle will shorten and your margins will hold.

For me, any B2B marketing communication strategy starts with *Visibility, Credibility* and *Memorability*. Visibility gets you noticed. Memorability makes you stand out. But Credibility is a crucial foundation. It's proof, not promise. Without credibility, you are invisible.





And credibility is amplified when your experts don't stand alone. Share the stage with your customers, let them tell the story. Address stakeholders' concerns at every stage of the journey - finance, compliance, operations - as well as the technical buyer. Reduce their risk, and you reduce friction in the buyer journey.

The Trust Advantage report turns trust from a belief into evidence you can execute on. The findings highlight which proof signals buyers look for, where credibility fails and how to make trust visible across every stakeholder touchpoint. It shows that credibility is essential for winning commercial advantage.

Vanessa



Vanessa Ashworth is a senior marketing director and board-level advisor, specialising in brand transformation and commercial growth through Visibility, Credibility and Memorability.



Executive summary

The role of trust in B2B tech buying

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

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

Proof signals matter. Buyers rely on transparent pricing (49%), case studies (48%), compliance credentials (45%) and visible leadership (25%) to assess the credibility of a company.

Economic pressure amplifies the value of trust. Almost half (49%) said that trust becomes significantly more important during downturns.

AI divides opinion. Transparent, purposeful use increases trust (48%). Obvious or inauthentic use undermines it.

Challengers can win. More than a third (38%) would actively consider lesser-known vendors in downturns if trust was established early.



If buyers don't trust you, they walk away. It's that simple.



Lorraine Emmett,
Managing Director,
EC-PR



The data & 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 credibility signals are weak.

Discovery is the hardest hurdle

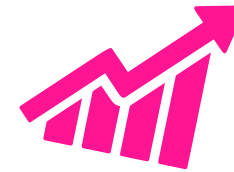
28% of buyers said they find it most difficult to trust a vendor at the research stage. This is the moment when websites, credentials and leadership visibility are scrutinised — often before any conversation with sales. If content is thin, pricing opaque or leadership invisible, doubt hardens into risk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



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 Software





Proof beats 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

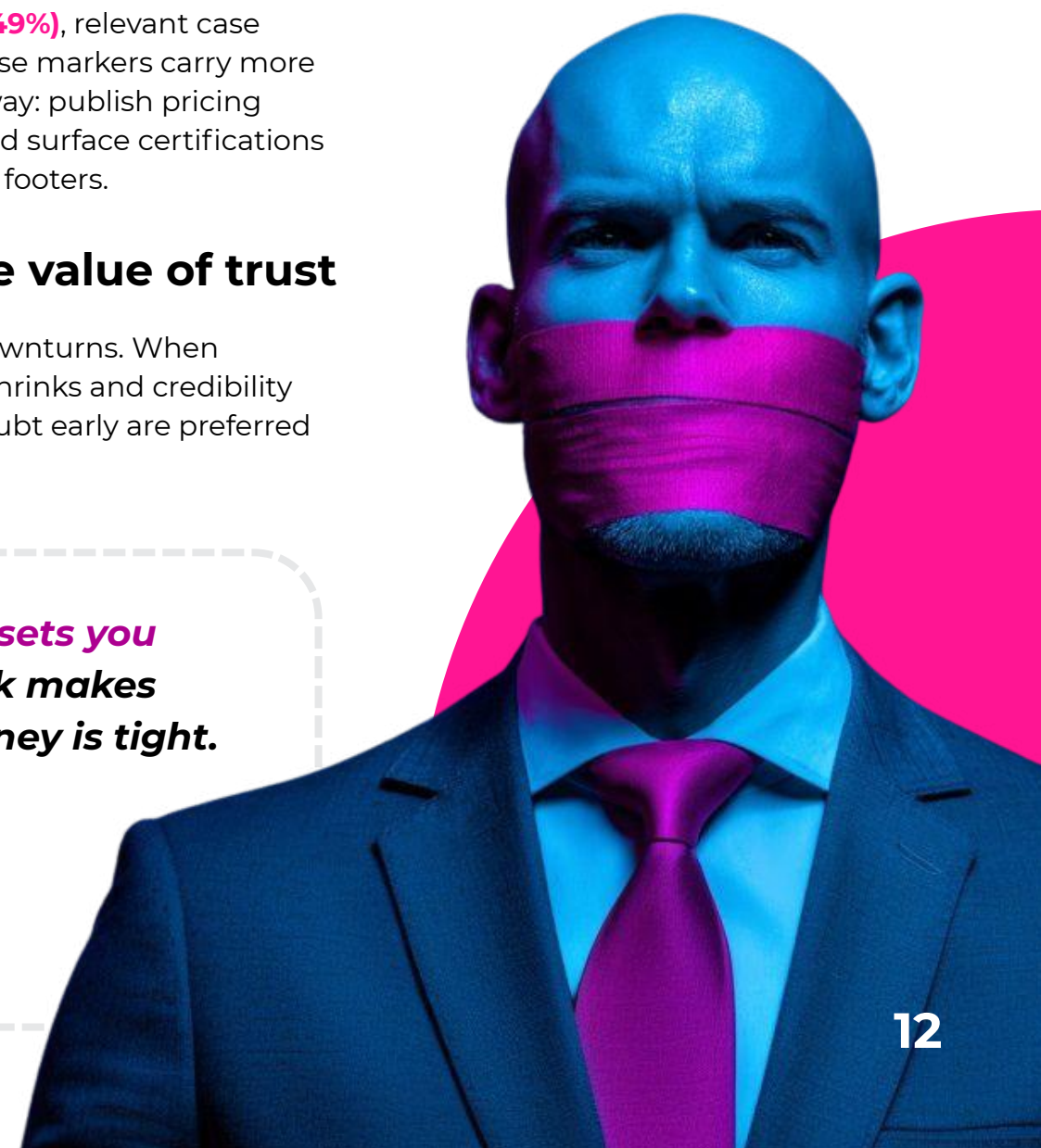
49% said trust becomes *much more important* in downturns. When organisations face financial pressure, risk tolerance shrinks and credibility outweighs discounting. Vendors that can remove doubt early are preferred over those offering marginal price advantages.



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)





Why buyers **walk away**

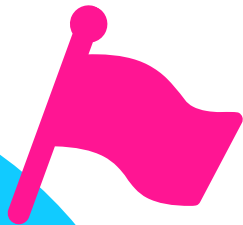
Seven in ten (**71%**) admitted to rejecting a vendor because they did not trust them, even when the solution technically met their needs. The triggers were evasive answers, over-selling and leadership silence. This demonstrates that communication failures can nullify product-market fit.



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)



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 UK
(Fleet Management Provider)



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. Strategic PR and independent proof points therefore have a disproportionate 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 Software





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)

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 project authority, evidence and transparency earlier than incumbents.



Liz Churchman,
Deputy Managing
Director, EC-PR

“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.”





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.



What works in practice (EC-PR perspective):



- 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 **leadership visibility cadence** through high-quality Thought Leadership that helps buyers make more 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.



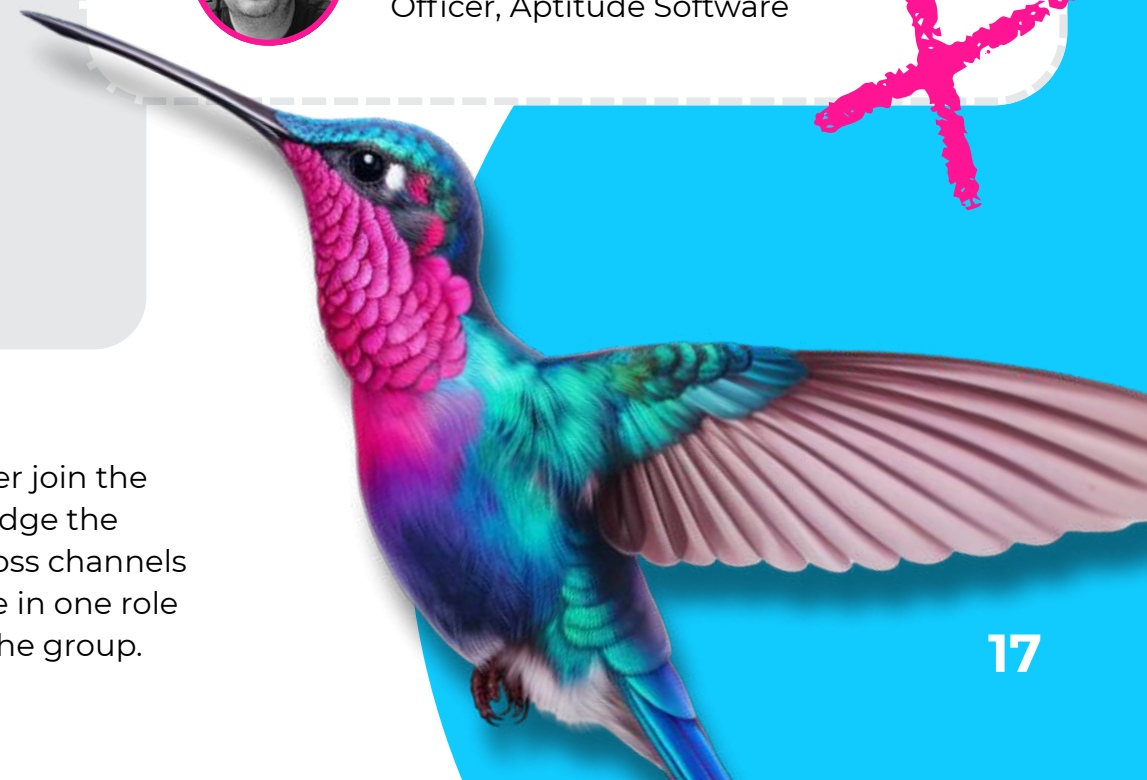
"I've been that IT guy who gets handed a brochure by the CFO saying 'this is the product we're using.' My answer was simple. No, we're not."



Derek Kenneally,
Chief Product and Technology
Officer, Aptitude Software



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)

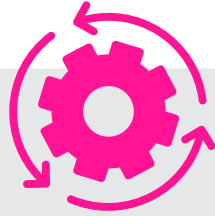
- Challenger vendors welcomed if credibility is established early.
- Responsiveness, transparency and measurable case studies drive trust.
- Analyst recognition and thought leadership accelerate entry.

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:

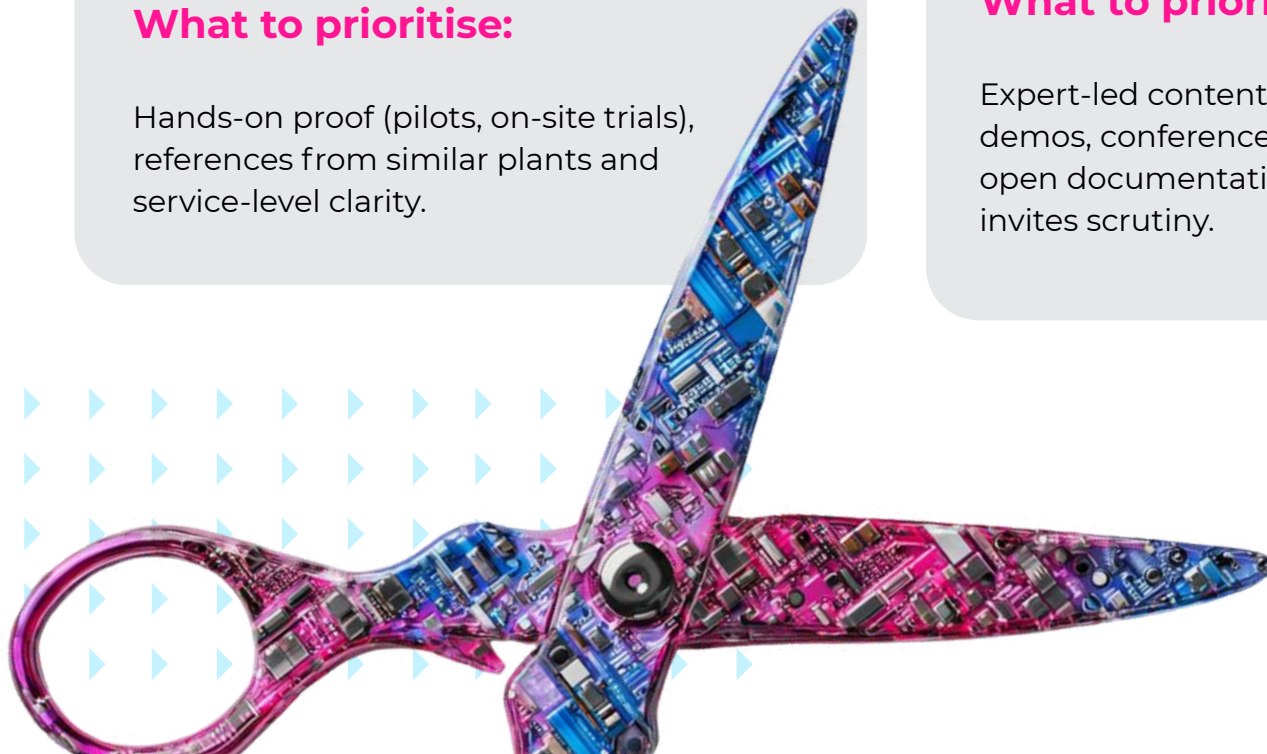
Hands-on proof (pilots, on-site trials), references from similar plants and service-level clarity.

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

- The trust mandate



1. Put **credibility** before capability.
Trust now decides vendor selection. If communications don't build confidence, product strength won't matter.



*We see time and again that **credibility gaps derail deals** long before the technical evaluation. Trust is the first gate you must pass through.*

– Lorraine Emmett, Managing Director, EC-PR





2. Win discovery or lose the deal.

Buyers struggle most at the research stage, when online signals matter the most.



If your proof points aren't visible before sales engage, you're not even in the running. Discovery is the silent audition.

– Liz Churchman, Deputy Managing Director, EC-PR

3. Engineer content for hidden buyers.

Deals stall when finance, procurement, or compliance aren't convinced.



Hidden buyers will never be in your meeting, but they will still judge you. Speak to their concerns or risk the deal collapsing.

– Lorraine Emmett





4.

Treat trust as a **recession-proofing** strategy.

In downturns, buyers prioritise credibility over cost.

“

*Discounting is a race to the bottom. Trust is what keeps deals alive when budgets are **under pressure**.*

– Liz Churchman



5.

Use **AI with intent**, not automation.

AI can enhance or erode credibility depending on execution.

“

*AI should make your people more visible, not less. Authenticity always comes from a **human voice**.*

– Lorraine Emmett





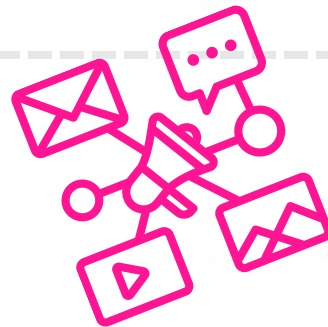
6. Level the playing field.

Challenger brands can win if they establish trust earlier than incumbents.



*The firms that win against bigger rivals are those that are **clearer**, more **transparent** and more **consistent** in every channel.*

– Liz Churchman



Operationalising 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. Orchestrate leadership visibility

- 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 is the first study to quantify how mid-sized technology firms face the same trust dynamics as enterprise peers. It validates what global research has shown at the macro level and translates it into actionable insight for growing firms.

Trust is not a soft attribute. It is the hard currency of B2B buying — the deciding factor in whether a vendor is shortlisted, engaged or rejected.

But the presence of trust is not only about preventing failure. When trust is established, it accelerates momentum. It creates confidence across the buying group, shortens decision cycles and enables challenger brands to compete head-to-head with market leaders.

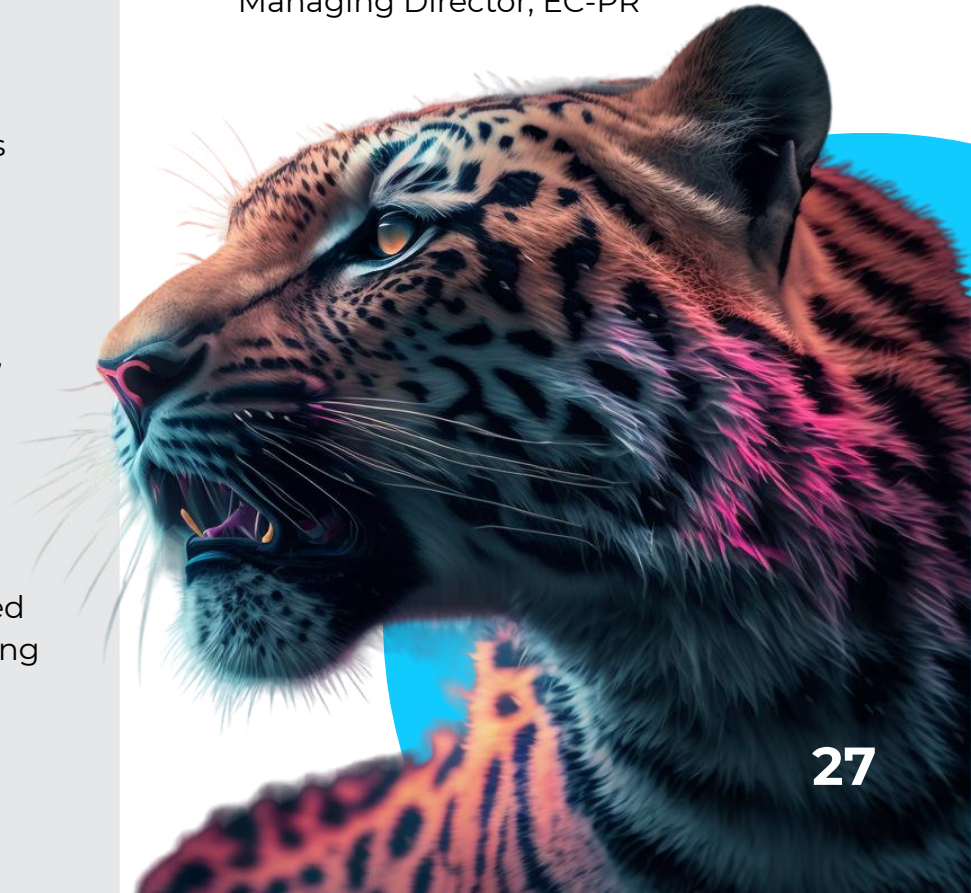
We see this repeatedly. Organisations that invest in consistent, credible communications grow faster because they remove doubt before sales begin. The Trust Advantage provides the evidence base for this: where trust is won, where it is lost and how communications can convert credibility into growth.

This is not just research. It is a practical framework for mid-sized firms that want to compete at the enterprise level without losing time or market share to inconsistency and mistrust.



Trust prevents rejection, but more importantly, it accelerates growth. When people believe you, they buy faster, stay longer and advocate with conviction.

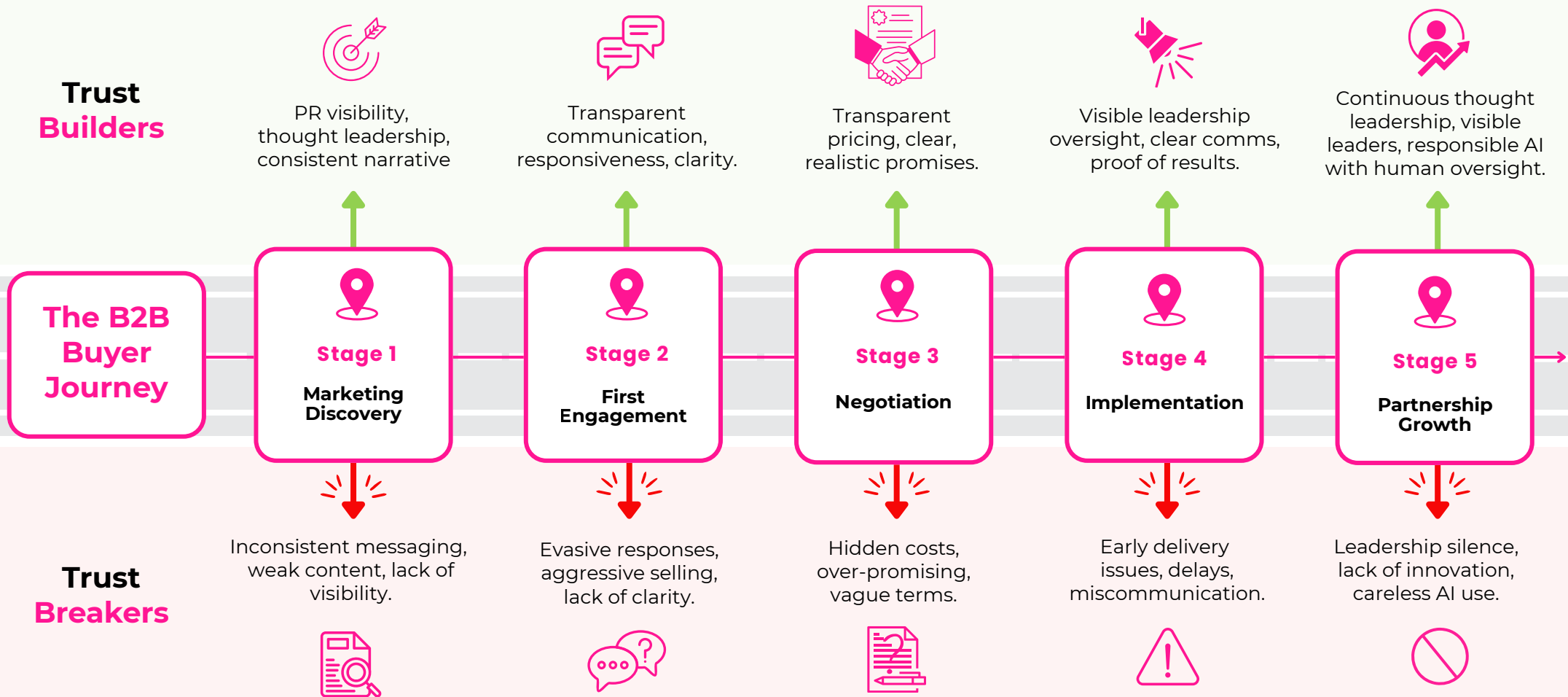
Lorraine Emmett,
Managing Director, EC-PR



The trust journey: How B2B vendors win or lose Deals



Trust is the foundation of every successful B2B partnership. This journey shows where trust is built and where it breaks across the entire vendor relationship. Strengthening trust at each stage improves deal velocity, renewal rates and long-term advocacy.



So what can you do?

- **Assess:** Identify where trust gaps exist across your customer journey, from initial contact to renewal.
- **Align:** Ensure your marketing, sales, and delivery teams share a consistent, transparent narrative and clear expectations.
- **Act:** Invest in consistent communication, visible leadership and tangible results to build lasting credibility.

