



A TRUST ECOSYSTEM® REPORT

The Trust Recession Report

*Updated October 2026: what buyers need now, and what to
watch into 2027*

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Before you read this

You're an established coach, consultant or service provider, and you're doing plenty of marketing. The posts go out, the emails land, the funnel runs the way it's supposed to, and yet the thing that's meant to happen at the end of it, the conversation that turns into a sale, keeps arriving late or not at all. You've probably already worked out that more content or another platform won't fix it. What you're running into is a trust problem, and it's bigger and more structural than any one funnel fix.

This report draws on six years of the Edelman Trust Barometer, the world's largest annual study of trust, together with research published in 2025 and 2026 on how buyers now research and decide, and how they respond to AI along the way. It's the evidence behind the Trust Gap, the space between how good you actually are and how quickly your ideal buyers trust you enough to act on it. If you heard me speak at the Sales Makers Summit, use the Trust Gap Finder alongside this report to see exactly where your own funnel asks for trust it hasn't earned yet.

Part One: the evidence, and why it still holds

A mindset, not a mood

The single most useful number in this report is the one the 2026 Edelman Trust Barometer led with: 70% hold an insular trust mindset (Edelman Trust Barometer 2026). That means seven in ten people now extend trust readily to their own circle, family, friends, their own employer, and withhold it by default from everyone outside it, including you, until you've earned your way in. Edelman's own 2026 special report on brand growth found the same pattern showing up in buying decisions specifically: people with an insular mindset are more than twice as likely to refuse to buy from a brand they associate with people unlike themselves, and in some markets the trust gap between a brand's general audience and a brand seen as "for someone else" runs as wide as 23 points. It's become the baseline your buyers are operating from, and it'll outlast the news cycle. It also means the scepticism you're meeting on a sales page or a discovery call almost never started with you.

The research happens before you ever hear about it

For several years now, Edelman has tracked how people actually go about researching a purchase, and the 2024 figure is the one worth holding onto: 59% use online search as their main way of researching products and services (Edelman 2024). Practically, that means most of your buyers are forming a view of you, reading your reviews, checking your site, looking at what you post, long before they ever get in touch. If your trust signals aren't visible at that stage, you lose the lead silently; they simply never make contact, and you never know they were there.

What's changed since that figure was published is where that research increasingly happens. Newer data, covered in the next section, suggests a meaningful slice of that pre-contact research has started

moving from search engines into AI chatbots. The principle Edelman identified hasn't changed at all: buyers decide whether to trust you before they speak to you. Only the tool they're using to do it has started to shift.

Credentials get you considered; understanding gets you chosen

The clearest shift in who buyers trust to tell them the truth is this: 68% say trust is earned by a business "understanding what people like me need", and that holds at 65% even among high-grievance, the most sceptical, people (Edelman 2025). Formal titles and credentials still matter, and so does experience, but none of that's sufficient on its own any more. What moves a sceptical buyer from considering you to choosing you is the feeling that you understand their particular situation.

This sits alongside what Edelman calls the grievance effect. People with a high sense of grievance, the belief that business serves a select few and that the system is rigged in favour of the already-successful, rate business as far less ethical and far less competent than people with low grievance. That's not a fringe audience either; moderate-to-high grievance is the default state for most buyers now. It means a good proportion of the people landing on your website already carry a low-level suspicion that you might be another expert who talks about results without actually caring about the person behind them. Better testimonials alone won't shift that. It needs trust built into the structure of your funnel from the very first step.

Where buyers still find an advantage in you

Across every year Edelman has measured it, family-owned and smaller, visibly-led businesses have out-trusted large, publicly-traded ones, and the reason is straightforward: they feel personal and accountable, with someone whose name and reputation are genuinely on the line. If you're a solo expert or a small team, that's a structural advantage over the faceless alternative, provided you actually use it. The same research shows that around two-thirds of buyers choose, switch, avoid or boycott businesses based on where they stand on values as well as on competence. Your buyers are filtering you through what you stand for before they get anywhere near what you can do for them.

The shape of the Trust Gap

Put together, this is what the gap looks like from either side of it.

Without trust engineered in	With trust engineered in
Buyers hesitate and delay	Buyers arrive pre-qualified
Long nurture cycles before a yes	Faster decisions, fewer objections
You're compared against competitors	You're the obvious choice
Sales feel heavy and slow	Sales feel natural
Good calls that lead nowhere	Referrals and repeat work flow

In 2020, you likely had until a discovery call to close that gap. By 2026, the judgement is largely made before anyone contacts you at all, which means the gap has to be closed earlier, in your content and your positioning, well before the sales conversation.

Part Two: what's new since this was last written

Four things have moved since this report was first put together, and each one changes how the Trust Gap shows up for you specifically.

Buyers are starting their research inside AI, not search. G2's 2026 AI Search Insight Report, based on a March 2026 survey of over 1,000 B2B software buyers, found that 51% now start their research with an AI chatbot more often than Google, and that AI chatbots are the single most influential source shaping a buyer's shortlist, at 54%, ahead of review sites at 43% (G2, 2026, learn.g2.com/g2-2026-ai-search-insight-report). This matters for you even outside software: it's the clearest sign yet that the "DIY research buyer" Edelman identified in 2024 has started doing that research through an assistant that summarises and ranks for them, rather than a list of links they scroll through themselves. Gartner had already predicted the shape of this back in February 2024, forecasting that traditional search engine volume would fall by 25% by the end of 2026 as generative AI tools become substitute answer engines (Gartner, 2024, gartner.com/en/newsroom/press-releases/2024-02-19-gartner-predicts-search-engine-volume-will-drop-25-percent-by-2026-due-to-ai-chatbots-and-other-virtual-agents). If an AI assistant is increasingly the thing forming a first impression of you, the question is no longer only "what does my website say about me", it's "what would an AI assistant find and repeat about me if someone asked it."

AI-generated content starts at a trust disadvantage. A 2026 study by Meltwater and YouGov, surveying close to 10,000 people across seven markets, found that 32% of consumers would trust a brand less on learning its content was AI-generated, against only 15% who'd trust it more (Meltwater/YouGov, 2026, meltwater.com/en/blog/generative-ai-trust-yougov). For you, that's the sharpest possible argument against using AI to produce more of the same generic, polished messaging that already sounds like everyone else's. What decides the outcome is what you feed the tool and how visibly human the result stays.

Trust in how businesses use AI has fallen as adoption has grown. Salesforce's State of the AI Connected Customer research, its seventh edition, surveying more than 15,000 consumers and 1,500 business buyers, found that only 42% of customers now trust businesses to use AI ethically, down from 58% in 2023 (Salesforce, 2025, salesforce.com/resources/research-reports/state-of-the-connected-customer). As AI has become ordinary in the background of almost every business, buyers have grown more watchful about how it's being used on them.

Insularity has a brand-growth price tag attached to it. Edelman's 2026 special report on brand growth under insularity, covering 15 nations and over 17,000 respondents, put a number on the cost of being seen as "not for someone like me": brands seen as serving people unlike the buyer face a trust gap of up to 23 points against the same brand's general reputation, in markets as different as France, Germany

and South Africa (Edelman, 2026, [edelman.com/trust/2026/trust-barometer/special-report-brands](https://www.edelman.com/trust/2026/trust-barometer/special-report-brands)). Trust and relevance have effectively become a joint purchase criterion, sitting alongside price and quality rather than beneath them.

Taken together, these four points sharpen rather than overturn the original case. Buyers are more insular, more AI-assisted in how they research, and more sceptical of AI-produced polish, all at once. That's a reason to use AI with more care, and it's why the next section matters more than it did a year ago.

Part Three: AI and trust in the funnel

Here's the distinction that decides whether AI helps you or works against you without your noticing: AI amplifies whatever you give it. Feed it generic positioning and it will produce generic positioning faster and in greater volume. Feed it a funnel built on urgency and pressure, and it will scale that pressure across every touchpoint it reaches, with none of the friction that used to slow a human copywriter down. That's what selling out with AI actually means: using it to do more of the same thing that was already eroding your buyer's trust, just quicker and at greater scale.

Selling more with AI, without selling out, means the opposite: using it to build trust into every step of the way people find you, while the relationship and the conversation stay entirely yours. That's the job the Trust Ecosystem® was built to do, and AI is one of the tools inside it, working from the thinking behind it.

Two parts of that methodology are worth having in front of you directly.

The Trust Buyer Model™. Every buyer decides whether to trust you through the lens of their own nervous system, and most funnels are written for only one of four types, leaving the other three underserved. The Beacon buyer acts fast and trusts confidence and momentum. The Compass buyer is analytical and trusts logic and clarity. The Anchor buyer is relational and trusts safety and alignment. The Flame buyer is emotional and trusts passion and purpose. A single funnel built around one of these voices will convert the buyer who happens to share it and lose the other three, often without you ever knowing why.

The four thoughts. Every step of a well-built funnel should leave a buyer with one of four thoughts, in order: *this person knows their stuff*, then *if this is what's free, imagine what's behind the paywall*, then *it's like they're in my head*, then *I want to work with this person*. Map your own funnel against those four and you'll usually find at least one step that doesn't move the buyer on to the next thought at all; it just repeats the one before it, or jumps straight to asking for trust the earlier steps never built.

AI is genuinely good at this kind of work. It can walk your funnel as your buyer and tell you exactly where it asks for trust it hasn't earned. It can take one message and write it four ways, once for each buyer type, in less time than it takes to write it well for one. It can hold your positioning and your proof consistent across every touchpoint, so trust keeps building even on the days you're not personally there

to build it. What it can't do, and shouldn't be asked to do, is supply the inputs: your point of view and your proof are still entirely yours, and so is the conversation itself, which is where a trust funnel should hand over to a real person rather than try to close the sale on its own.

Part Four: what to watch into 2027

Proof of fit will outweigh proof of impressiveness. Buyers trust people who demonstrably understand people like them more than they trust an impressive track record in the abstract. The practical shift is where your proof sits: a client's own words at the exact point someone is deciding, not filed away on a testimonials page nobody visits on the way to buying.

Cold and warm buyers need different funnels. A funnel built for someone who's followed you for a year and a funnel built for someone meeting you for the first time are asking for trust at completely different starting points. One funnel for both tends to lose both: it asks the cold buyer for more trust than they've built yet, and bores the warm buyer with reassurance they no longer need.

Buyers are consolidating around fewer names they already trust. As AI makes it easier for almost anyone to sound capable, and harder to tell who actually is, buyers appear to be responding by narrowing their shortlist rather than widening it, favouring names they've already built some trust with over an unfamiliar one that merely looks polished. G2's data on AI chatbots reshaping shortlists points the same way: the businesses an assistant already recognises and can speak confidently about have an advantage that a newer or less visible competitor doesn't. The question worth sitting with into 2027 is whether you're one of the names it's consolidating around.

AI builds the trust; the conversation stays yours. The evidence in this report points one way: as AI becomes ordinary, the human parts of your business become the parts buyers trust. The job of a trust funnel is to use AI to bring the right people into a conversation they already trust you enough to have, and then to have that conversation yourself.

Where to go next

If you've read this far, you already know roughly where your own funnel might be asking for trust it hasn't earned. The Trust Gap Finder will show you exactly where: use it to find the first place in your own funnel that asks for trust before it's built it, and start there.

YOUR NEXT STEP

Tell me what you found

When you've run the Trust Gap Finder, email me at hello@lighthouse.online with the first gap it found and what you're thinking of doing about it. I'll reply with what I'd do next.

Or let's talk it through

If you'd rather talk it through, message me on WhatsApp at house.uk/whatsapp and we'll find a time to look at your funnel together and agree your first fix.

Gemma

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