

SPECIAL REPORT

# MOST TRUSTED BRANDS 2023

 MORNING CONSULT<sup>®</sup>



# Trust is hard to build, and vital for missteps

**Our Most Trusted Brands ranking is a coveted one. Once a brand inches its way up to the top of the list, it rarely moves. That's because consumer trust as a metric does not change much year over year. And it's also a vital tool for helping brands weather scandals.**

This is Morning Consult's fourth annual Most Trusted Brands report, our yearly effort highlighting the brands that have secured top spots in consumer trust around the world, within the United States and among their respective industries. This year, our rankings are even more robust: We've expanded this report to include industries such as social media, alcohol and apparel.

We leverage Morning Consult Brand Intelligence, our flagship platform that every day asks thousands of consumers about thousands of brands around the world, to form our rankings. Our lists are based on net trust: the share that trust a brand minus the share that say they distrust a brand. Read our full methodology [here](#).



**Trust is not something that shifts a lot year over year**  
It's what makes a spot on our rankings so coveted.



**Heritage and legacy brands decorate our top spots**  
A consistent, regular presence in consumers' lives helps build trust.



**Trust benchmarks should be adjusted by industry, country**  
Globally, travel & hospitality ranks lowest in net trust. Retail is highest.



**Gen Z has trust issues**  
Gen Z has lower net trust for all the brands on our U.S. ranking.



**A foundation of trust helps brands weather scandals**  
Build trust now so consumers stay loyal when missteps occur.

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## Why trust?

Every day, Morning Consult Brand Intelligence, our flagship platform, asks thousands of consumers both in the United States and around the world about thousands of brands: **“How much do you trust this brand to do what is right?”**

We do this because trust — a deep and intangible belief in the perceived virtue of a person, business or organization — is an important metric for institutions seeking success. A foundation of trust is critical for maintaining relationships with consumers, especially when missteps occur. There are many routes to being perceived as trusted, and they tend to vary by industry and demographic.



*Trust is hard to earn, but it's resilient: We don't see big changes in the metric from year to year, giving established brands a large leg up on aspiring competition — and that's what makes an appearance on our Most Trusted Brands ranking so coveted.*

### How does trust interact with other key metrics?

We track 10 key brand metrics every day in Morning Consult's Brand Intelligence. Of these metrics, trust and value are the most highly correlated, with a maximum correlation of 0.63. We view these two metrics as crucial building blocks for maintaining a strong reputation with consumers. The other metrics we track are also important for understanding brand perception, but trust is a good place to start.

While metrics such as brand favorability are more volatile, trust is different. That's because it is more of a state of mind for consumers. We see trust gains for brands over long stretches of time, and we typically see trust dips around disreputable news cycles. Often, when brands have a strong foundation of trust, we see trust levels recover even after major scandals.

There's no straight line through the marketing funnel for most consumer-facing brands. The consumer journey is a messy process of jumping back and forth between different stages. But trust is an essential building block to build and maintain along the way.



# Most Trusted Brands: Global

Eight of the 10 brands on our 2023 “Most Trust Brands: Global” list earned the most trust among consumers in their [respective countries last year](#), which further supports that trust is not a brand metric that tends to experience dramatic shifts year-over-year. The two brands with debut spots are Google in France and Canadian Tire in Canada; they ousted Lidl and Tim Horton’s, respectively.



## No. 1 Most Trusted Brand in each of the top 10 economies around the world



UNITED STATES | Band-Aid | Net Trust: 57.50



CHINA | Alipay | Net Trust: 79.62



JAPAN | Toyota | Net Trust: 40.70



GERMANY | PayPal | Net Trust: 60.21



INDIA | Google | Net Trust: 87.54



UNITED KINGDOM | Boots | Net Trust: 61.38



FRANCE | Google | Net Trust: 62.60



ITALY | WhatsApp | Net Trust: 65.62



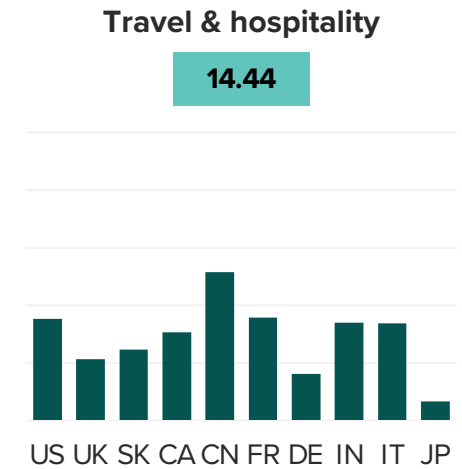
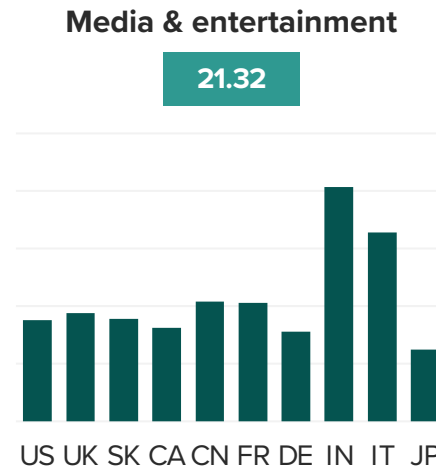
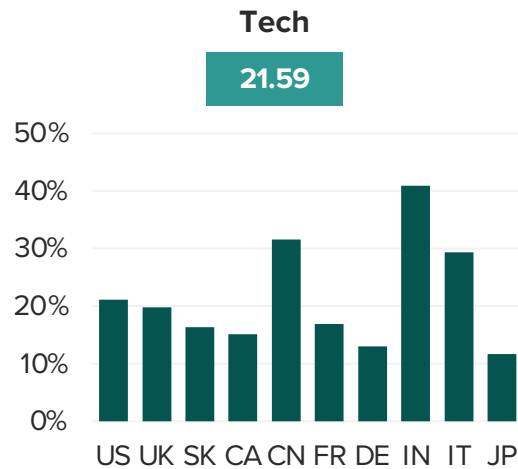
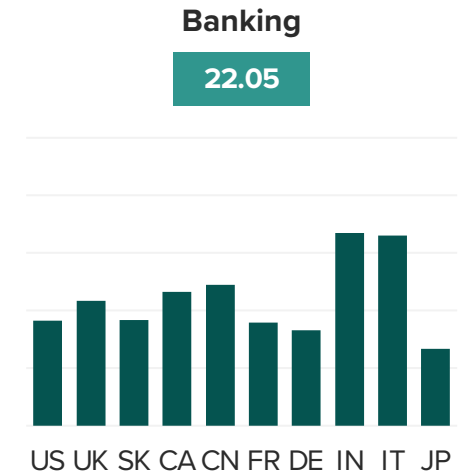
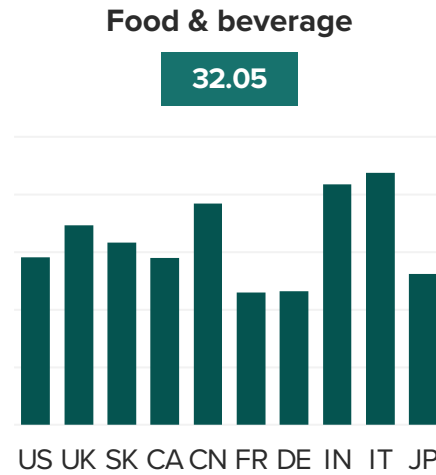
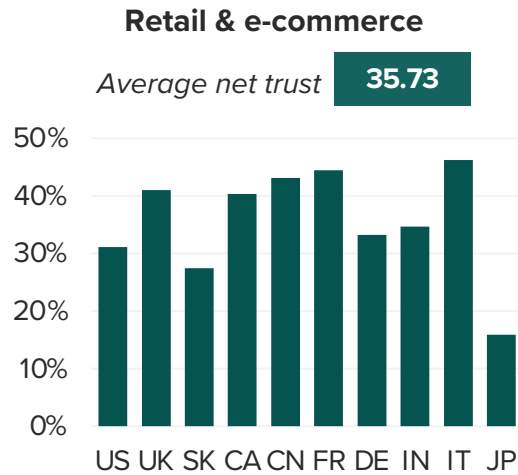
CANADA | Canadian Tire | Net Trust: 55.04



SOUTH KOREA | Samsung Electronics | Net Trust: 69.13

# Trust benchmarks should vary by industry and country

Net trust of all brands tracked in each industry in each country, March 2023



Source: Morning Consult Brand Intelligence



**SAMSUNG**



**Case Study by Amy He**

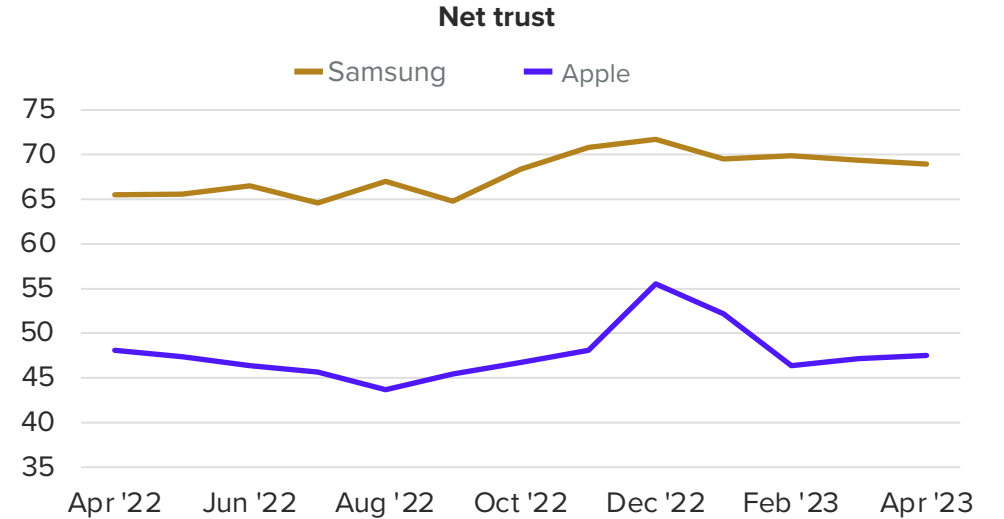
Morning Consult Analyst Team Lead

**Apple’s goal of dethroning Samsung in South Korea will be an uphill battle**

Over the last year, Apple has been making aggressive inroads in South Korea to usurp Samsung’s top spot in the country — from expanding its retail presence to finally launching Apple Pay after years of regulatory hurdles.

But it won’t be easy for the American giant: Samsung retained its No. 1 position as South Korea’s most trusted brand in 2023, whereas Apple comes in at No. 8. Not only has net trust in Samsung increased over the last year, but Apple trails Samsung among South Korean consumers on almost every brand measure tracked by MCBI. Of note is the massive gap in purchasing consideration: 67 percentage points for Samsung, 22 points for Apple.

The one bright spot for Apple, however, is Gen Z: Like countless other businesses, Apple wants to court Gen Z, and the gap in opinion of the two companies among this cohort is softer than that of the general public. This should provide ample opportunity for Apple in the coming years as the group ages up and gains more purchasing power.



**Net brand metrics, April 2023**

	All South Korean adults			Gen Z adults		
	Samsung	Apple	Difference	Samsung	Apple	Difference
Net purchasing consideration	67	22	45	53	32	25
Net favorability	76	53	23	77	61	16
Net trust	69	48	21	58	56	2
Net value	71	53	18	64	66	-3

Source: Morning Consult Brand Intelligence





**Case Study by Amy He**

Morning Consult Analyst Team Lead

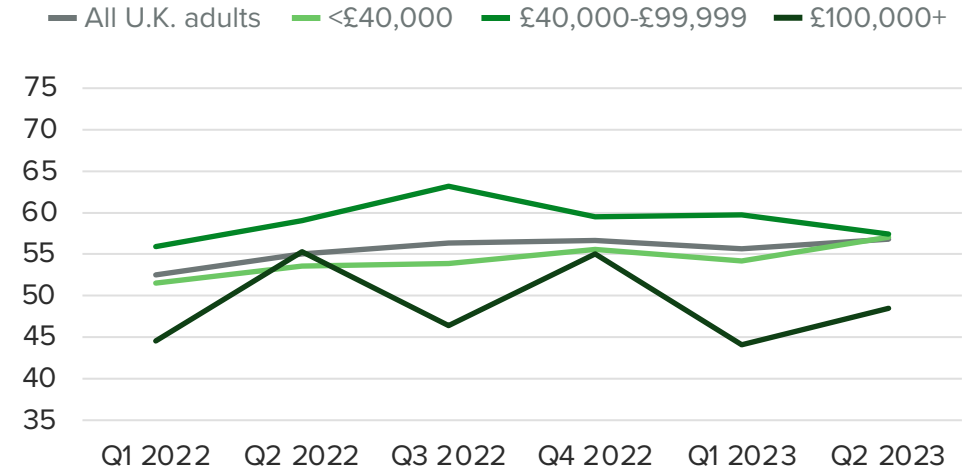
**Persistent U.K. inflation helped Lidl rise in trust**

To say that Brits were hit hard by inflation in 2022 would be an understatement. At one point last fall, inflation hit 11.1%, and against that backdrop, Lidl broke into the top 5 of the U.K.’s most trusted brands this year for its competitively priced goods.

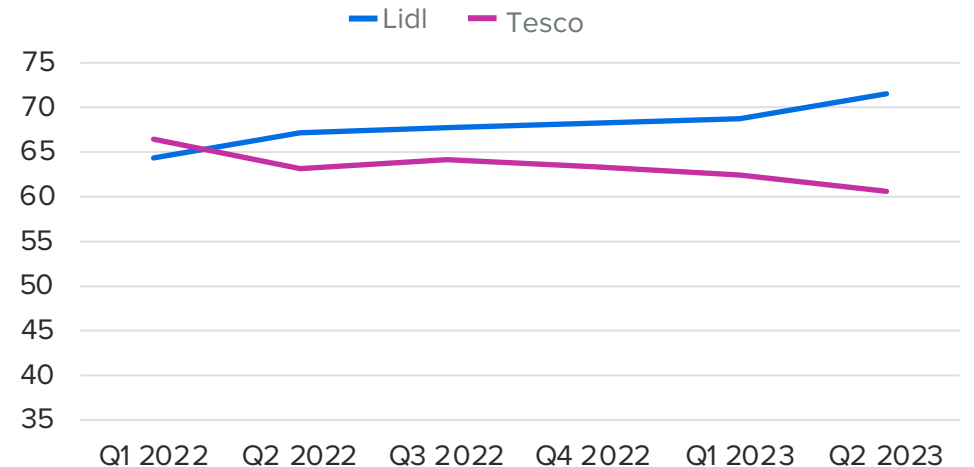
Net trust in the Germany-based discount chain has been steadily increasing as inflation in the region catapulted to record highs. Simultaneously, Lidl has enjoyed an increased perception of value — particularly among those with an annual household income between £40,000 and £99,999. That’s been reflected in the company’s quarterly sales growth, derived from shoppers with stretched budgets. MCBI data also shows that Tesco, one of Lidl’s competitors in the U.K., began trailing Lidl in perceived value early last year and has stayed behind since.

But Lidl has an opportunity to improve in its relationship with younger shoppers. As of April, net trust and net value among Gen Zers is at 54 points and 59 points — trailing the general population’s metrics of 57 points and 72 points, respectively.

**Lidl net trust by annual household income**



**Net value for Lidl vs. Tesco**







# Most Trusted Brands: United States

Trust is sticky, just like a Band-Aid. The adhesive bandage takes the number one spot yet again on our “Most Trusted Brands: United States” list. Band-Aid isn’t the only returning brand: Five other brands make repeat appearances on this year’s ranking.



## Top 10 Most Trusted Brands: United States



Band-Aid | Net Trust: 57.50



Amazon | Net Trust: 54.51



Kleenex | Net Trust: 54.18



Visa | Net Trust: 53.00



The Weather Channel | Net Trust: 52.50



UPS | Net Trust: 54.90



Lysol | Net Trust: 54.49



Cheerios | Net Trust: 53.42

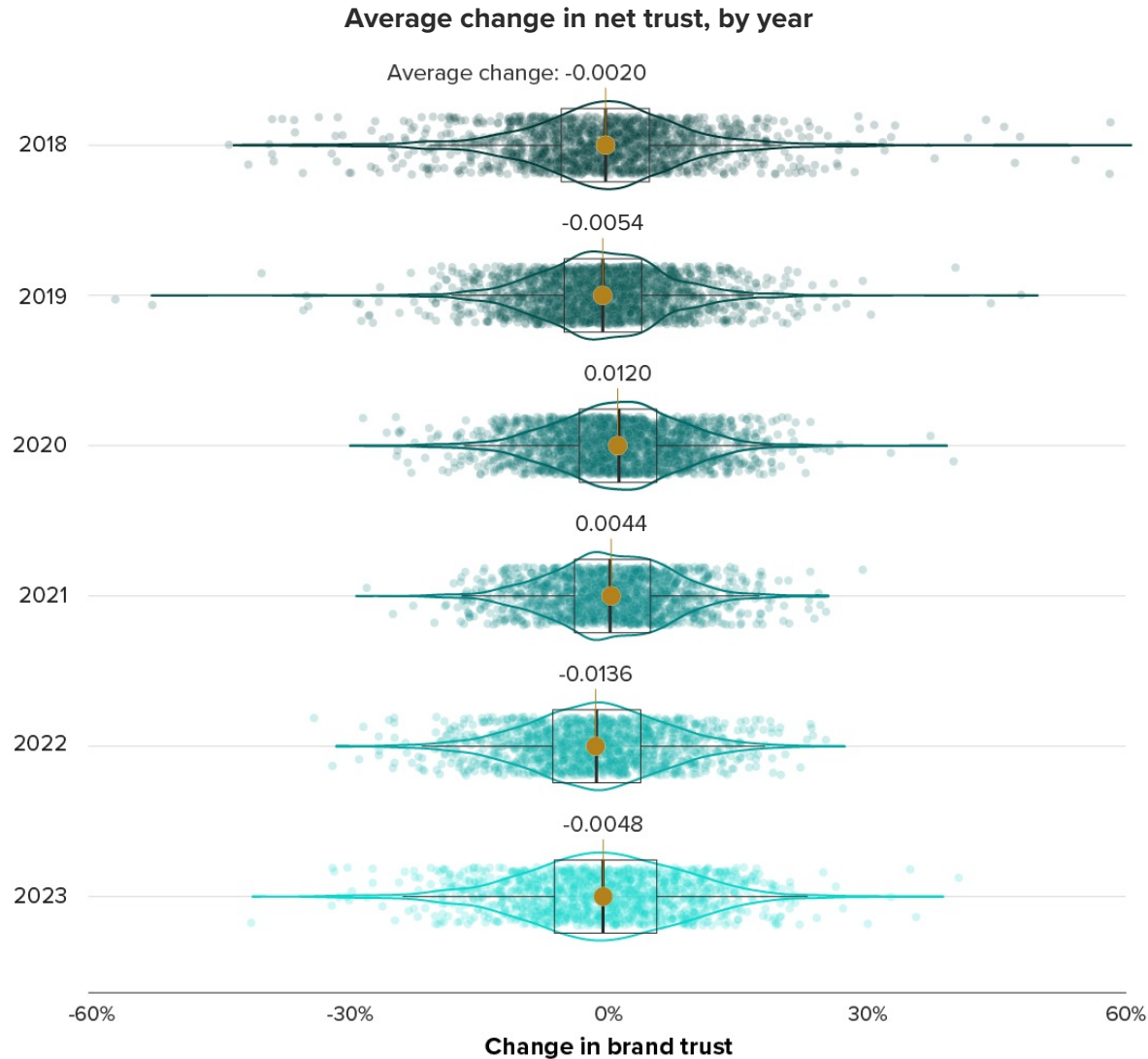


Dove | Net Trust: 52.97



FedEx | Net Trust: 52.17

# Trust does not meaningfully move year over year



The United States has experienced plenty of historic moments over the past five years, including a global pandemic, two presidential impeachments, persistent high inflation and bank failures.

**Despite these momentous events, one thing hasn't greatly fluctuated: consumers' overall trust in brands.**

Morning Consult Brand Intelligence tracks nearly 2,000 brands in the United States and has collected millions of responses from consumers on whether or not they trust brands to do what is right.

This year, we saw little change from years past. Average change in brand trust sat at -0.0048, a 0.0088 difference from 2022.

This is good news for brands that have built high trust among consumers — but it's a challenge for those looking to strengthen trust on a macro level.



**Case Study by Nicki Zink**

Morning Consult Analyst Team Lead

**Gen Z trust is far from guaranteed**

Even brands that garner the highest levels of trust have work to do with Gen Z. The youngest generation of adults is less likely than the general population to say they trust every brand on our “Most Trusted Brands: United States” list to do what is right. They’re also more likely to have lower average net trust in the 1,500+ brands we track domestically on MCBI.

AVERAGE NET TRUST* (PERCENTAGE PTS)	All U.S. adults	Gen Z adults	Millennials	Gen X	Baby boomers
	20	11.26	19.49	22.41	22.23

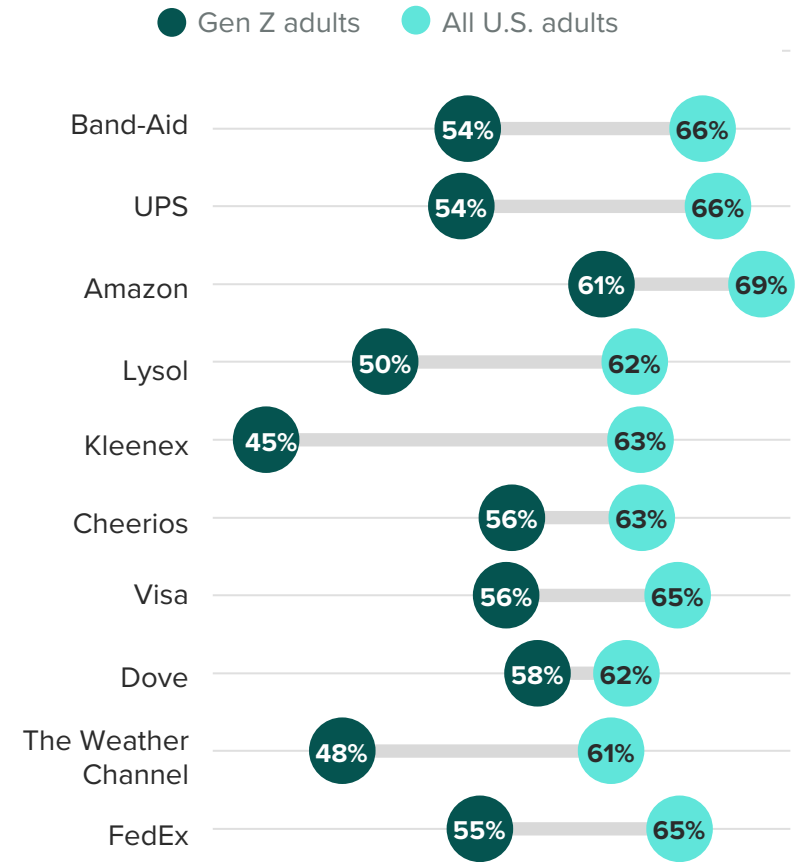
This makes sense given that Gen Zers as a whole exhibit [lower levels of trust](#) in all industries and institutions. Some of this trust will be built up over time — remember, Gen Zers are young consumers. They need additional touchpoints with these brands to continue to build trust.

Like the courting of millennials, brands need to work to meet Gen Zers where they are without coming off as the corporation in the room. A good example is Chipotle Mexican Grill’s response to a [viral TikTok menu hack](#) by partnering with the influencers and formally adding the item to its menu.

Source: Morning Consult Brand Intelligence

\*Brands in the aerospace and defense, chemicals, energy, health, medical devices, military, nonprofit, pharmaceutical and semiconductor sectors were not included in the analysis.

**Shares of respondents who said they trust the following brands:**





**Case Study by Nicki Zink**

Morning Consult Analyst Team Lead

**Key Google sub-brands garner more trust than Google proper**

Google came close to making our “Most Trust Brands: United States” ranking, but one of its sub-brands, Google Maps, came even closer. The navigation service would have ranked No.1 on our ranking, with Google Chrome and Google Search also earning spots higher than Google, if we included service-based children brands in our rankings. ([See more on our methodology here.](#))

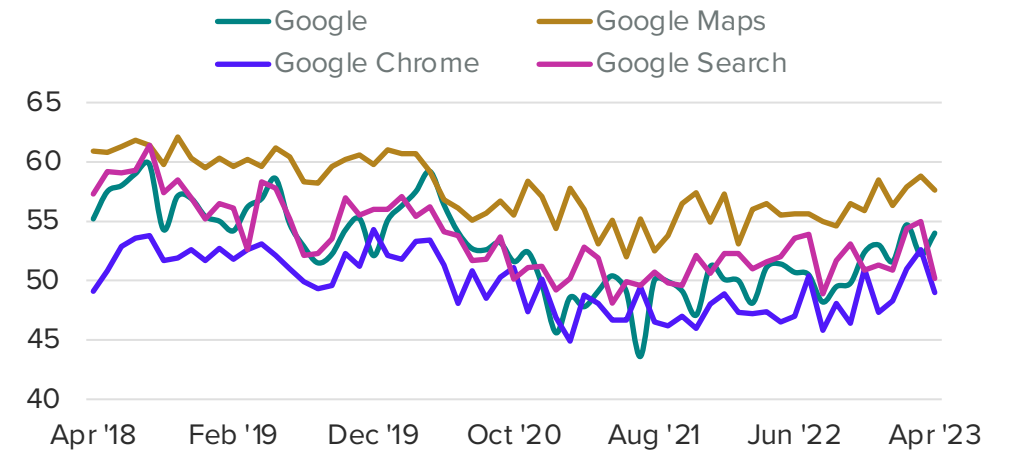
Some of this can be attributed to the sub-brands’ lower levels of distrust as compared to Google, although the differences are quite small (Google Maps has among the lowest distrust of Google sub-brands at 9 points, 6 points lower than Google). Google’s higher distrust is likely somewhat symptomatic of Big Tech [losing some of its sparkle](#) in the eyes of consumers.

Frequent, positive interactions with Google sub-brands deserve partial credit for not breaking consumers’ trust, as does staying on the forefront of innovations that puts consumers first. For example, Google Maps recently announced updates that [incorporate artificial intelligence](#) and new features that means users are [less likely to get lost](#) on their next trip to a national park.

**Brand trust metrics**

BRAND	TRUST	DISTRUST	NET TRUST
Google Maps	69%	9%	<b>59.24</b>
Google Search	68%	13%	<b>54.90</b>
Google Chrome	65%	12%	<b>52.78</b>
Google	67%	15%	<b>51.86</b>

**Net trust by brand**



Source: Morning Consult Brand Intelligence





# Most Trusted Brands: Travel & Hospitality

Consistency is the name of the game, as the top-ranked travel brands this year are very similar to 2022's. Hotels and digital planning tools dominate the “Most Trusted Brands: Travel & Hospitality” rankings. Notably absent? Most airlines — a signifier of a turbulent year in air travel.



## Top 10 Most Trusted Brands: Travel & Hospitality



1

Holiday Inn | Net Trust: 37.27



2

AAA Travel | Net Trust: 36.78



3

Marriott | Net Trust: 36.65



4

Hilton Hotels & Resorts | Net Trust: 35.83



5

Tripadvisor | Net Trust: 34.09



6

Hyatt Hotels | Net Trust: 31.86



7

Expedia | Net Trust: 31.48



8

Best Western | Net Trust: 30.81



9

United Airlines | Net Trust: 28.81

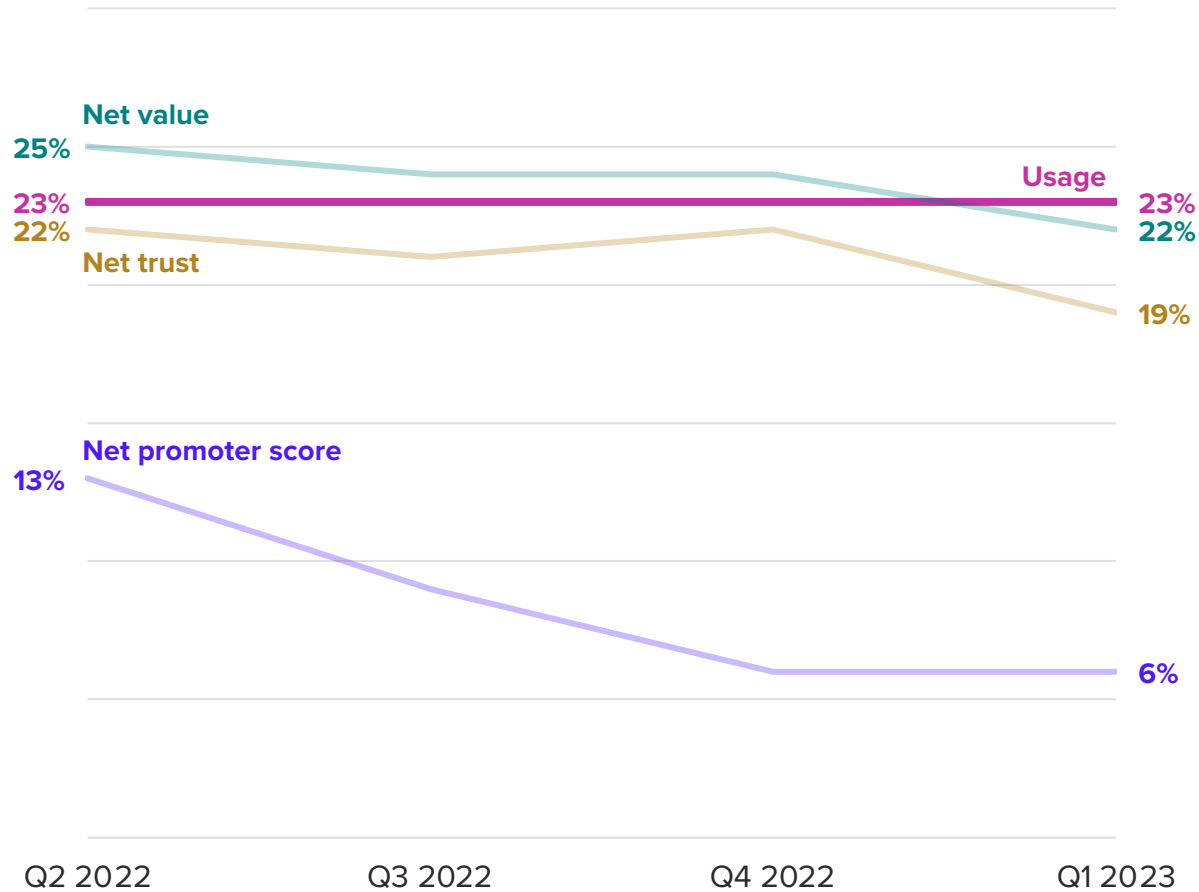


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Comfort Inn | Net Trust: 28.66

# Trust is a tricky proposition when consumers have limited choices

Average key metrics for all U.S. airlines tracked in MCBI, rebased by awareness



The travel & hospitality category as a whole enjoys relatively high trust among consumers, trailing only the food & beverage and health care industries in [overall trust levels](#), according to Morning Consult trend data. But individual sectors within the industry tell a different story.

Airlines, for example, have experienced declining consumer trust through post-pandemic travel surges and major disruptions. Along with trust, perceived value and net promoter score — both measures of consumer satisfaction — have dipped. However, none of these declines have resulted in a drop in usage. In other words, people are still flying, but they’re less satisfied with the airlines.

The fact that trust doesn’t impact usage is mostly due to lack of choice — often it’s a flight or nothing. While it’s true airlines are attracting customers, they’re not fostering loyalty, which raises long-term issues. If customers only book with a brand because they have no other choice, that brand is poorly positioned to fend off any future competition — whether it be from other airlines, or from future innovations in the travel industry. Airlines that are hoping to play the long game must work to repair trust now.



**Case Study by Lindsey Roeschke**

Morning Consult Lead Travel & Hospitality Analyst

**Consistently high trust across major demographics helps AAA Travel top rankings**

Most brands aim to foster a high level of trust among their target audience. Few, however, are able to do so across most major demographics. AAA Travel, the No. 2 brand on the “Most Trusted Brands: Travel & Hospitality” list, holds its place due to the shares of consumers who say they trust the brand “a lot” — spanning generations, income levels and travel frequencies.

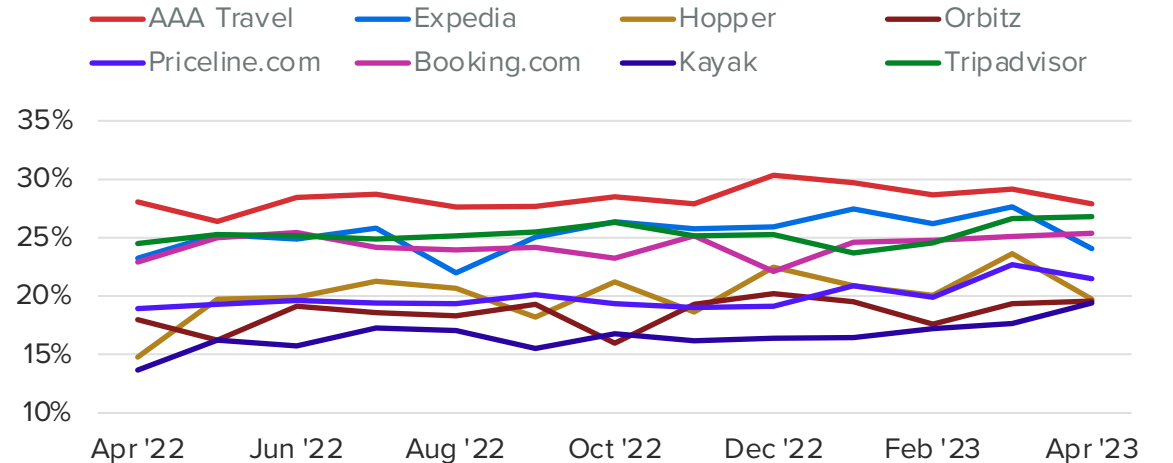
This broad trust translates to higher purchase intent. Compared to other online travel search and booking tools, AAA Travel has commanded a higher level of purchase consideration over the past year, with more than a quarter of consumers who have heard of the brand saying they plan to buy from it.

The presence and history of AAA as an umbrella brand no doubt contributes to this trust and purchasing consideration, but the travel-specific arm will continue to benefit as trip-planners across all demographics turn to online resources for support.

**Shares who are aware of AAA Travel and said they trust the brand “a lot”**



**Purchasing consideration among those who are aware of the following brands:**



Source: Morning Consult Brand Intelligence



**Case Study by Lindsey Roeschke**

Morning Consult Lead Travel & Hospitality Analyst

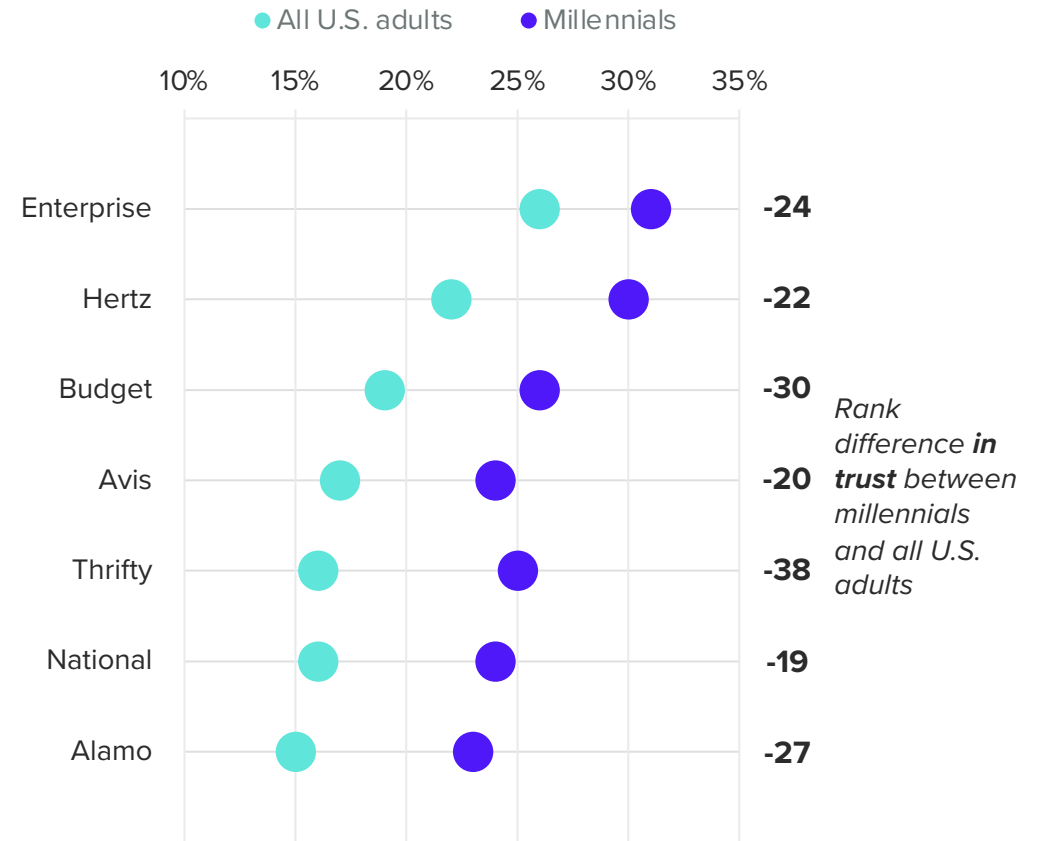
**Strong purchasing consideration doesn't translate to trust for rental car brands among millennials**

Auto rental companies, compared to other travel & hospitality subcategories, enjoy a fairly high level of trust. Among those who are aware of the brands, auto rentals have a net trust of 26 points, 5 points higher than airlines and 9 points higher than cruise companies. However, each individual rental car brand ranks lower among millennials compared to the general population — in other words, millennials are placing their trust elsewhere in the category.

Just because they are less trusting of auto rental companies doesn't mean millennials aren't considering using them. Purchasing consideration among every car rental company is higher for millennials than any other generation. This makes sense, as millennials are frequent travelers, and they also make up the majority of parents traveling with young children. This life stage often prompts the need for a car to get around in place of ride-hailing services or mass transit options, which can be trickier with children in tow.

To build trust with millennials who value straightforward, honest brands, rental car companies should focus on clarity and transparency throughout the entire customer experience.

**Shares who are aware of and are considering purchasing from each brand:**







# Most Trusted Brands: Retail & E-Commerce

One of these things is not like the others: An e-commerce brand reigning over a list of retail stores with strong national brick and mortar networks proves that there's an exception to every rule. Still, eight of the ten most trusted retailers are repeats from 2022. Consistently delivering on customer expectations is key to maintaining trust.



## Top 10 Most Trusted Brands: Retail & E-Commerce

1 **amazon**

Amazon | Net Trust: 54.51

2



Home Depot | Net Trust: 51.52

3



Lowe's | Net Trust: 51.00

4



Target | Net Trust: 50.38

5



CVS Pharmacy | Net Trust: 49.19

6



Walgreens | Net Trust: 48.85

7



Ace Hardware | Net Trust: 47.53

8



Costco | Net Trust: 46.59

9



Best Buy | Net Trust: 46.36

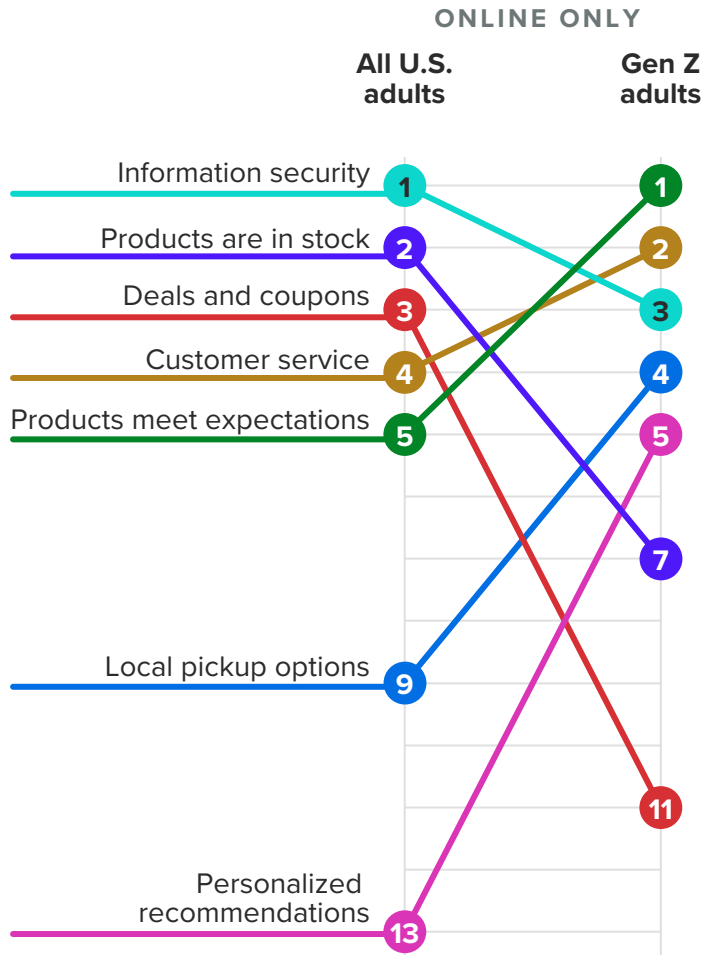
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PetSmart | Net Trust: 46.27

# How retailers earn and maintain shoppers' trust

Ranked impact of each of the following features on consumer trust:



Earning and retaining consumer trust is important for all retailers, but e-commerce brands have a steeper hill to climb.

Nearly all (93%) U.S. adults say that retailers with physical stores are “very” or “somewhat” trustworthy, but that number is just 77% for online-only brands (and falls even further to 68% among Gen Z adults).

Online-only brands also have more disparate trust drivers across generations. Shoppers who trust online-only brands tell us those retailers keep their information secure, consistently have products in stock, and reliably offer discounts. Those trust drivers differ substantially for Gen Z: Rather than coupons, Gen Z is looking for online brands with local pickup networks and AI-driven personalized recommendations.

Physical stores have more consistent trust drivers between Gen Z and the general population, though encouraging social shopping in stores is a key differentiator.





**Case Study by Claire Tassin**

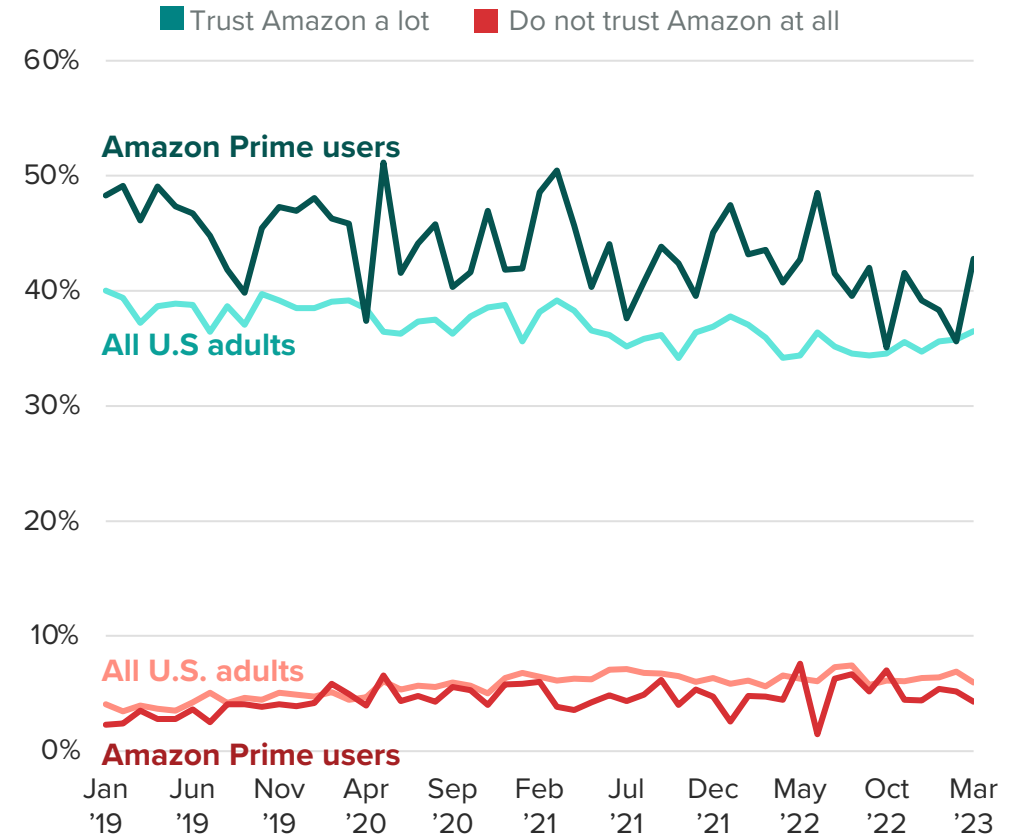
Morning Consult Lead Retail & E-Commerce Analyst

**Amazon reigns, but its trusted status is slipping**

Amazon’s top spot on this year’s “Most Trusted Brands: Retail and E-commerce” list is impressive, given that our research shows that online-first brands tend to earn lower trust ratings than those with a brick-and-mortar presence. But Amazon gets shoppers’ key trust drivers right — namely, keeping products in stock and offering robust ratings and reviews to ensure that products meet expectations. Recently Amazon debuted [“frequently returned”](#) flags on product pages to further assist consumers, a helpful metric given the ongoing challenge of fake reviews.

Still, it’s noteworthy that the share of Prime users who trust Amazon “a lot” is diminishing over time, while the share of the same group who do not trust Amazon at all is gradually growing. That downward trend may be leveling off: After years of headlines about labor and antitrust issues, news about Amazon has simmered down, while the company has also recommitted to two-day delivery — though [introducing return fees](#) is unlikely to help.

**Amazon trust responses**



# Most Trusted Brands: Beauty and Personal Care

Gen Zers' [disparate trust drivers](#) for online shopping should be of particular concern for beauty brands, as they are more likely to shop online for beauty products than the general population. Beauty products are highly personal and finding the right color and consistency online is really challenging — just because a product works well for an online influencer does not mean another person will have the same result.

Most brands on this list are ubiquitous in stores with high consumer familiarity, which helps bolster trust. Glossier is an exception to the rule as a digital-first beauty brand, but its growing slate of brick-and-mortar stores encourages shoppers to try out the full product range. After that, refilling online is a no-brainer.

### Respondents who said they are likely to shop online for beauty and personal care products



### Top 10 Most Trusted Brands: Beauty and Personal Care, among Gen Z adults

- 

Vaseline | Net Trust: 47.01
- 

Dove | Net Trust: 43.05
- 

Burt's Bees | Net Trust: 33.02
- 

Bath & Body Works | Net Trust: 32.88
- 

ChapStick | Net Trust: 28.57
- 

SheaMoisture | Net Trust: 27.28
- 

Ulta Beauty | Net Trust: 26.40
- 

Aquaphor | Net Trust: 23.03
- 

L'Oréal | Net Trust: 22.97
- 

Glossier | Net Trust: 21.66



# B

## Case Study by Claire Tassin

Morning Consult Lead Retail & E-Commerce Analyst

### Fenty is not your average celebrity beauty brand

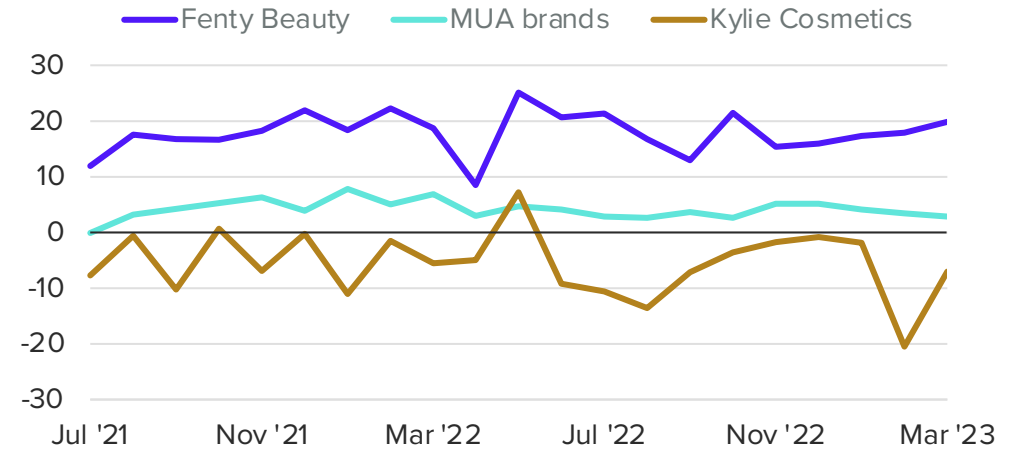
Nobody does it like Rihanna. Over the past few years, celebrities from Ariana Grande to Brad Pitt have launched their own beauty and personal care product lines, but Fenty Beauty’s success took more than singing and acting talent.

Fenty is the top-ranked celebrity-led beauty brand in consumer trust, coming in at No. 13 among Gen Z adults and No. 41 among all U.S. adults. Brands ahead of Fenty on the list are household names with widespread availability, while those led by or named for prominent makeup artists (MUA) lack the brand awareness required to earn such high trust rankings.

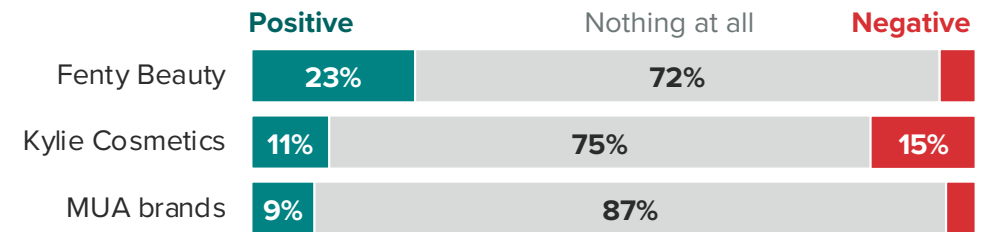
Rihanna’s promotion of the line during her 2023 Super Bowl performance certainly helped bolster buzz, but headlines and brand trust are not synonymous. Kylie Cosmetics has similar total buzz responses to Fenty among Gen Zers, but it fell to the penultimate spot in net trust among Gen Z adults.

Capturing Gen Z’s brand loyalty is a [tall order](#), and Fenty’s ability to stay atop the industry news cycle while continuing to put out innovative products will help to sustain its relevance.

Net trust among Gen Z adults



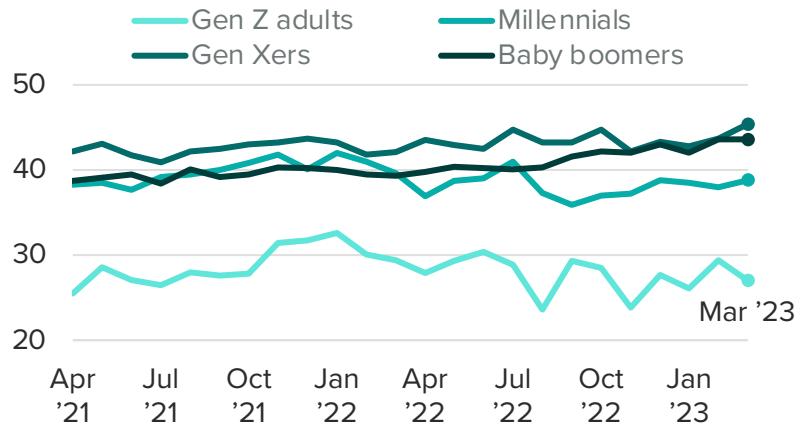
Brand buzz among Gen Z adults, Q1 2023




# Most Trusted Brands: Apparel, Footwear and Accessories


One theme among this year’s most trusted apparel, footwear and accessories brands is a strong American heritage. Levi’s, Hanes, Wrangler, New Balance and Converse were all founded over a century ago, and have retained long-standing trust among U.S. consumers, particularly those over the age of 26. The younger cohort in Gen Z is harder to win over and gives brands lower trust ratings overall.


Net trust in the top 10 most trusted apparel brands





## Top 10 Most Trusted Brands: Apparel, Footwear and Accessories


- 


Levi's | Net Trust: 49.62
- 


Hanes | Net Trust: 48.14
- 


Adidas | Net Trust: 43.24
- 


Kohl's | Net Trust: 40.78
- 

Wrangler | Net Trust: 40.65
- 

Under Armour | Net Trust: 38.84
- 

New Balance | Net Trust: 38.53
- 

T.J. Maxx | Net Trust: 38.28
- 

Old Navy | Net Trust: 38.10
- 

Nike | Net Trust: 38.08





**Case Study by Claire Tassin**

Morning Consult Lead Retail & E-Commerce Analyst

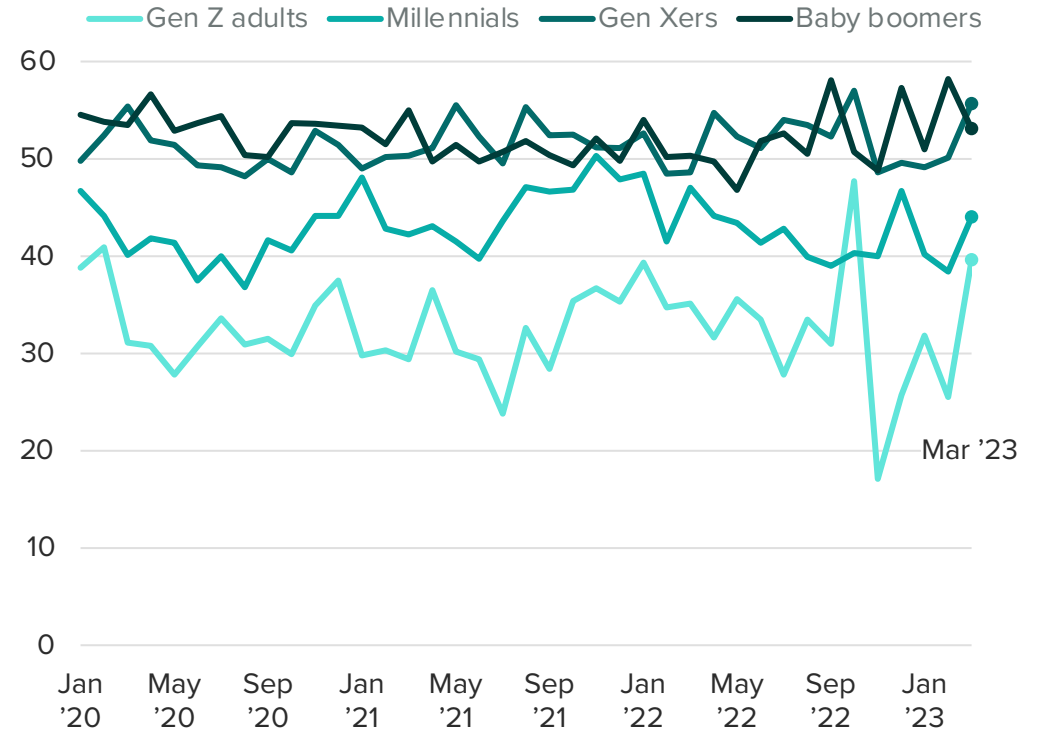
**Levi's exemplifies the power of American heritage**

It's not a coincidence that Levi's is celebrating the [150th anniversary](#) of its iconic 501 denim style in the same year that it leads the most trusted brands list in its category. The brand's popularity spans generations: Despite TikTok trends, it has the highest favorability among baby boomers and Gen Xers, though favorability among younger generations is not far behind. Moreover, the brand earns consistently high net trust ratings, particularly from older generations.

This strong heritage and consistent brand trust is helpful when trust is threatened. Levi's lost trust among Gen Z adults last fall when a vintage pair printed with [racist language](#) sold for \$76,000 around the same time that an advocacy organization organized a [pressure campaign](#) asking the brand to sign on to the International Accord for Health and Safety in the Textile and Garment industry. The brand's trust among Gen Z has quickly rebounded.

Levi's has accomplished the challenging feat of staying relevant in terms of both apparel style and in meeting customers where they want to shop; in the latest [earnings release](#), the brand touted major gains in direct-to-consumer channels — a strong indicator of continued brand loyalty.

**Levi's net trust**



Source: Morning Consult Brand Intelligence





# Most Trusted Brands: Food & Beverage

Each of the top 10 brands in the “Most Trusted Brands: Food & Beverage” list has a long, rich heritage in the industry, many dating back more than 100 years to the origins of packaged foods. Today, these brands are household names that have earned consumers’ trust by consistently delivering high-quality products that meet consumers’ needs for generations.



## Top 10 Most Trusted Brands: Food & Beverage

1 **Cheerios**

Cheerios | Net Trust: 53.42

2 **Kellogg's**

Kellogg's | Net Trust: 51.90

3 **Campbell's**

Campbell's | Net Trust: 51.63

4 **OREO**

Oreo | Net Trust: 50.34

5 **m&m's**

M&M's | Net Trust: 49.42

6 **HEINZ**  
ESTD 1869

Heinz | Net Trust: 49.39

7 **Lipton**

Lipton | Net Trust: 48.78

8 **RITZ**

Ritz Crackers | Net Trust: 48.75

9 **Lay's**

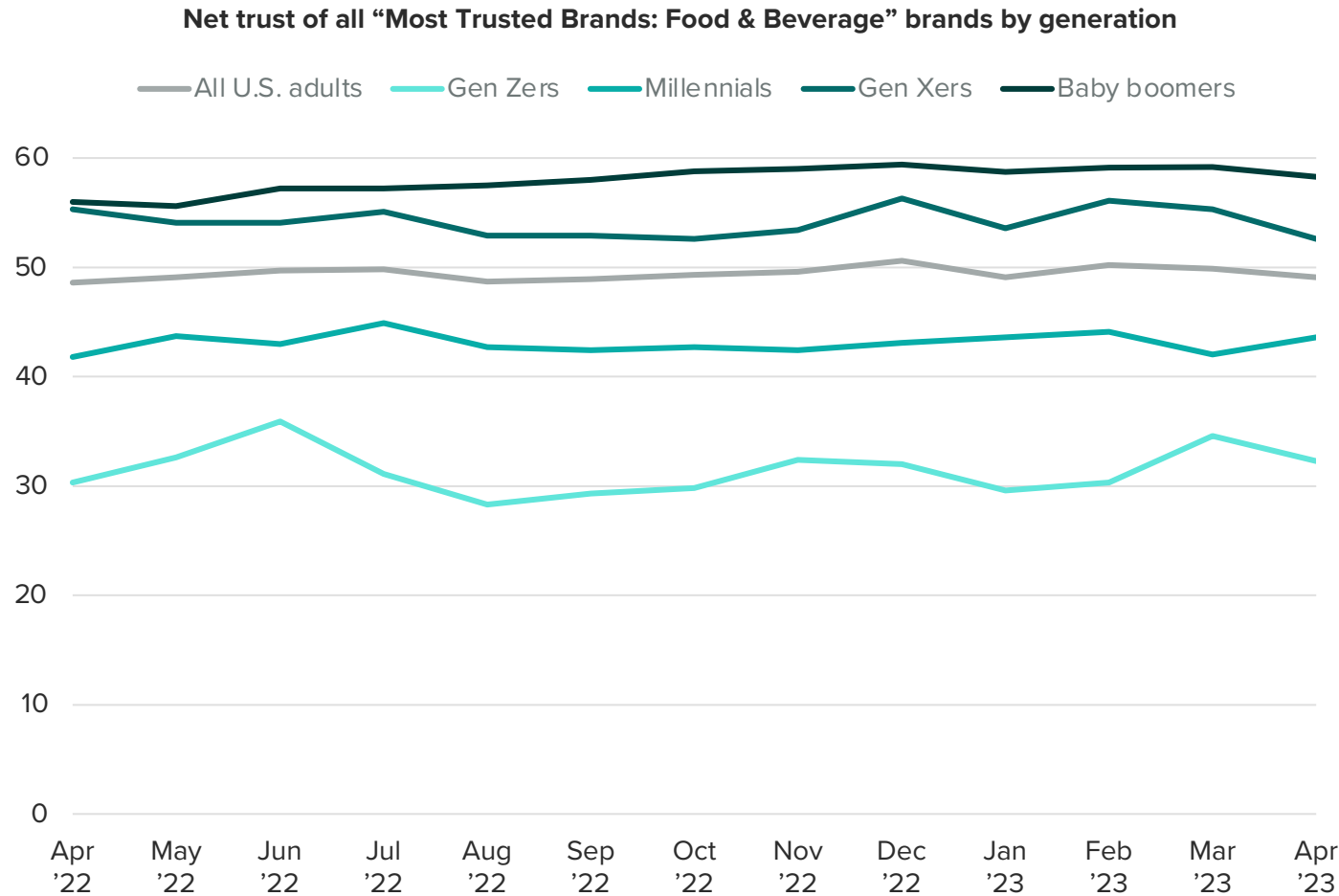
Lay's | Net Trust: 48.73

10 **Pillsbury**

Pillsbury | Net Trust: 48.61



# Food & beverage brands earn high levels of trust, but there's opportunity to improve with Gen Z



As a part of consumers' daily lives, brands in the food & beverage category have numerous touchpoints to deliver on expectations and earn consumers' trust.

The industry is largely meeting those expectations. As of March 2023, food & beverage brands score the [second-highest average net trust](#) among industries worldwide.

But generationally, that trust varies. Notably, Gen Z adults and millennials are less likely than their older counterparts to trust food & beverage brands to do what is right.

Coming of age alongside social media and the internet with all-access information at their fingertips, younger consumers can get to know brands more intimately than generations that came before them. This behind-the-scenes view can make consumers more skeptical of marketing efforts, which may come across as more on display today than the one-to-many traditional communication channels of the past.



**Case Study by Emily Moquin**

Morning Consult Lead Food & Beverage Analyst

**Kellogg's legacy is key to establishing trust**

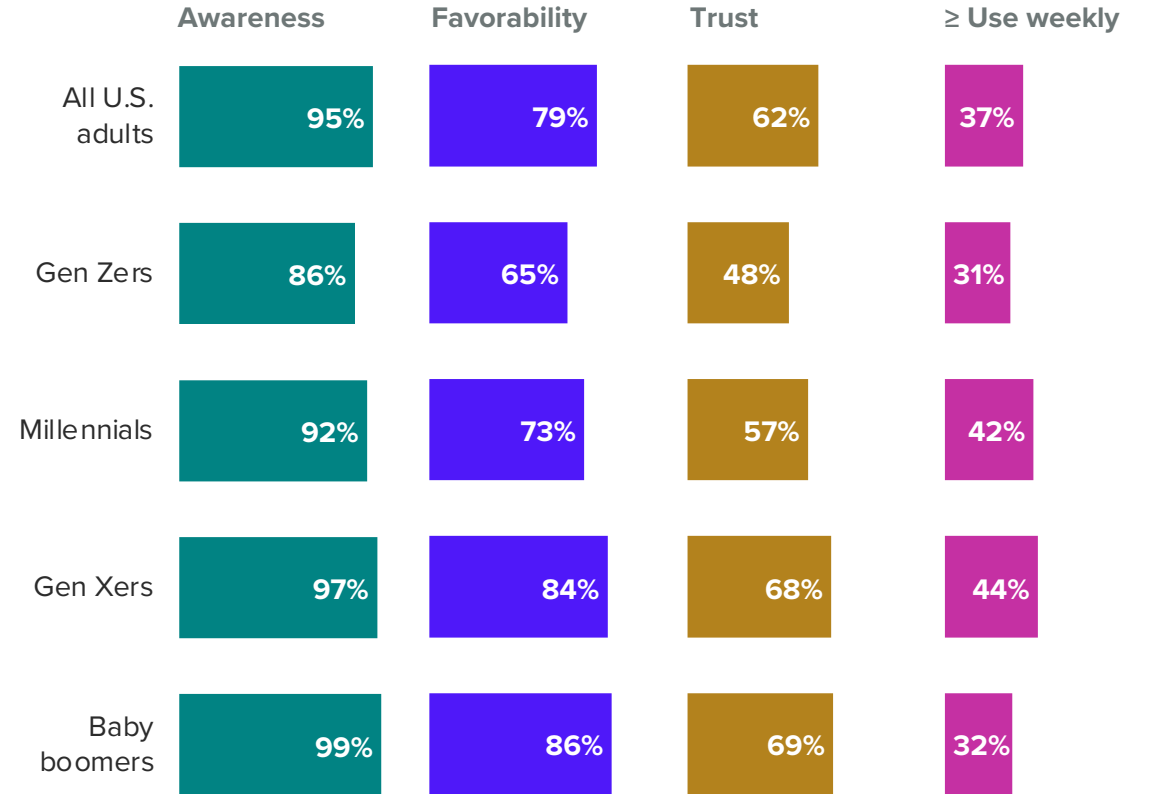
Morning Consult's "Most Trusted Brands: Food & Beverage" list is composed of well-established industry juggernauts. Take Kellogg's: The brand's flagship product, Corn Flakes, was created in 1894 by W.K. Kellogg, and it was among the first cereals to become widely available to American consumers. Today, the Kellogg's brand name adorns products across the entire grocery store.

This longevity and heritage leads to near ubiquity in terms of consumer awareness, which translates into favorability and, in turn, trust.

Now, the company has announced plans to separate its businesses, resulting in two independent entities: Kellanova and WK Kellogg Co. Of course, the well-known consumer-facing brand name isn't going anywhere.

Both new names and logos, released in March 2023, incorporate aspects of the Kellogg's brand – like the iconic "K" and the red font. This imagery will help Kellogg's harness the power of the brand that consumers have come to trust over a lifetime of use.

Shares who are aware, have favorable views, are trusting of and use Kellogg's at least once a week





# Most Trusted Brands: Limited-Service Restaurants

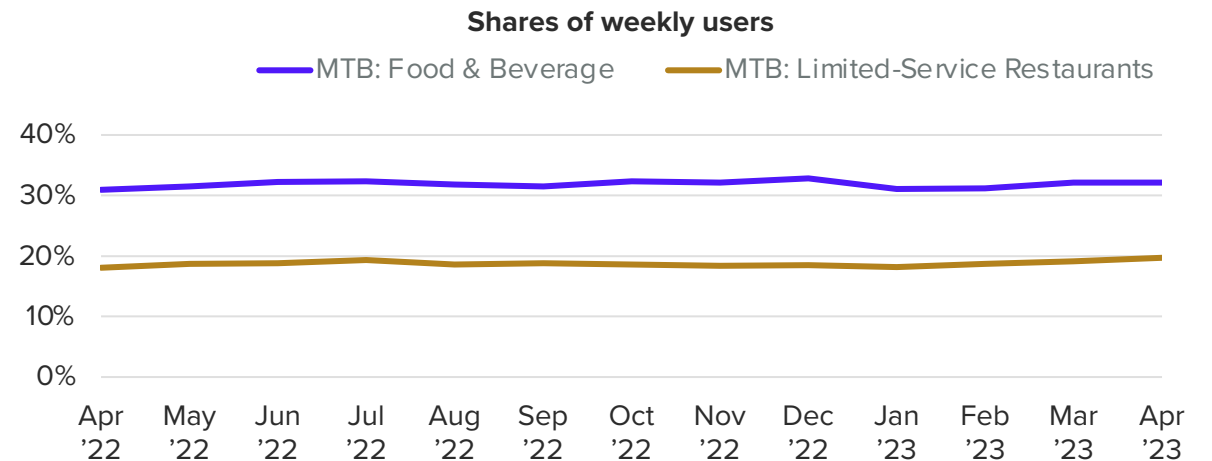
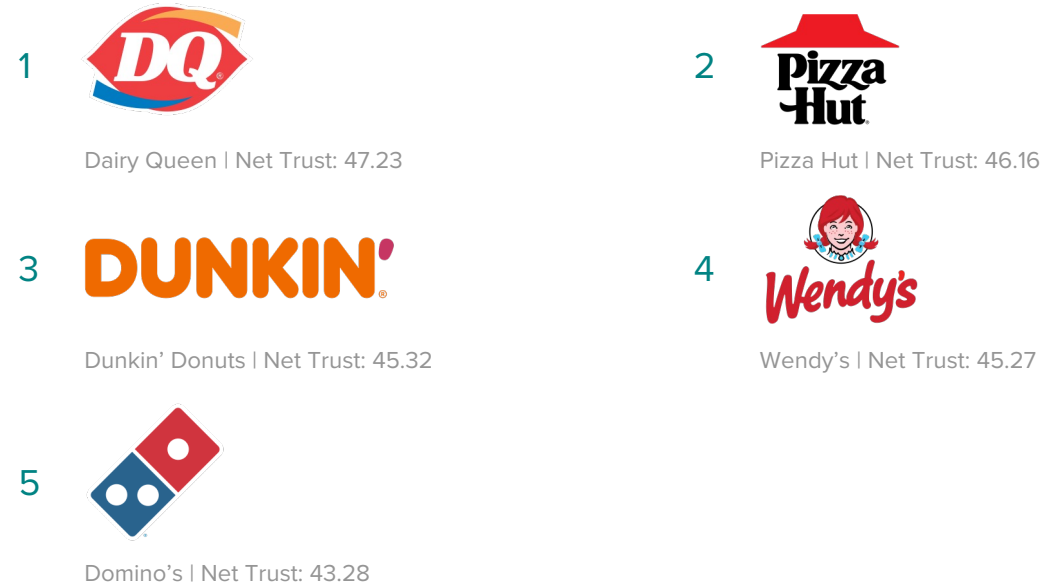
Limited-service restaurants earn slightly lower trust in the Morning Consult Brand Intelligence database, on average, compared with the household brand names on the “Most Trusted Brands: Food & Beverage” list.

Restaurants have fewer interactions and thus fewer touchpoints to earn consumers’ trust. That’s both because people tend to eat out less frequently than they eat at home and because many restaurant brands don’t have a national presence. For instance, those in the Northeast, accustomed to the ubiquity of Dunkin’ locations, might be surprised to learn there are none in the Northwest (where another large coffee chain is omnipresent).

What’s more, customer experience plays an influential role in restaurant interactions, adding another layer to the trust equation.

Simple, focused menus help the brands on the “Most Trusted Brands: Limited-Service Restaurant” list regularly deliver on consumers’ expectations for quality, consistency and value.

## Top 5 Most Trusted Limited-Service Restaurant Brands 2023: All U.S. Adults





**Case Study by Emily Moquin**

Morning Consult Lead Food & Beverage Analyst

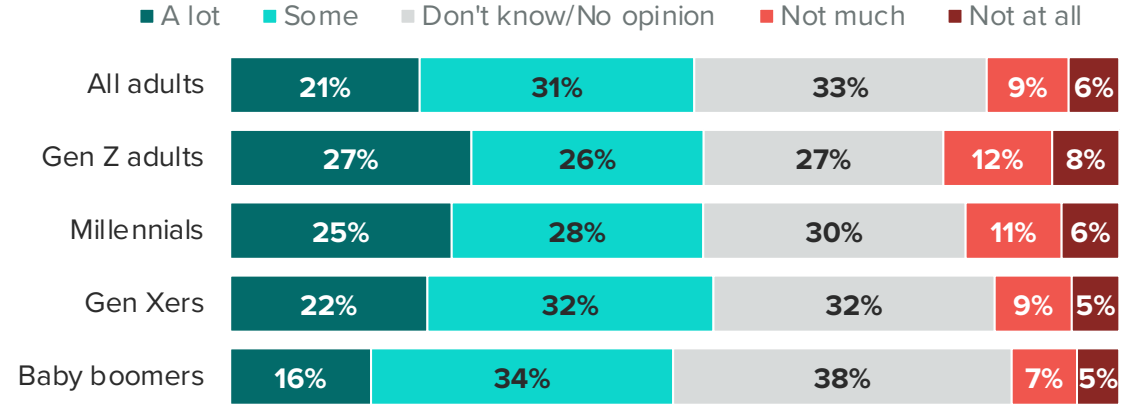
**Little Caesars earns Gen Z’s trust with relevant menu items and great value**

Recent efforts have helped Little Caesars achieve reach and relevance with Gen Z and landed the brand a spot on this year’s “Most Trusted Brands: Limited-Service Restaurant” list for this highly coveted generation.

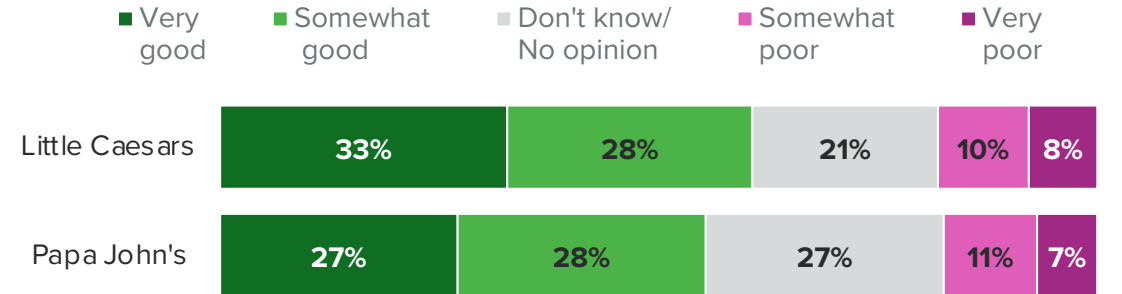
To gain awareness and the opportunity to earn Gen Z’s trust, Little Caesars is meeting members of the generation on their terms. That means giving their [pizza-loving Gen Z](#) customers what they want – like the return of Pretzel Crust pizza – and being a part of their favorite activities – like video gaming. For instance, Little Caesars partnered with Mountain Dew and offered a Call of Duty combo and unique game codes to unlock Dual 2XP as well as access to other bonus in-game items.

Value is also a key component. Gen Zers were 6 points more likely to say Little Caesars is a very good value compared to Papa John’s. Every point counts in the competitive quick-service segment.

**Trust responses by generation**



**Value responses among Gen Z**

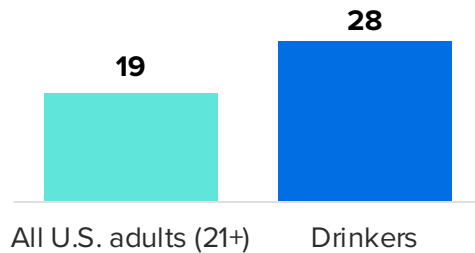


# Most Trusted Brands: Adult Beverage


Similar to the “Most Trusted Brands: Food & Beverage” list, many of the adult beverage brands with the highest net trust in their industry have a rich heritage — a long track record of delivering on consumers’ needs and earning their trust.


But net trust is quite a bit lower for adult beverage brands than for all food & beverage. Since not everybody drinks, many consumers have lower awareness about the brands in the category — or if they are aware, they have no or lightly held opinions. It is also a discretionary category with fewer usage occasions, and therefore opportunities, to earn consumers’ trust.


Average net trust of all brands on  
“Most Trusted Brands: Adult Beverage”





## Top 10 Most Trusted Brands: Adult Beverage, U.S. adults ages 21+


- 


Crown Royal | Net Trust: 19.64
- 


Budweiser | Net Trust: 19.53
- 


Samuel Adams | Net Trust: 19.52
- 


Barefoot Wine | Net Trust: 18.98
- 

Jack Daniel's | Net Trust: 18.91
- 

Blue Moon | Net Trust: 18.65
- 

Guinness | Net Trust: 18.63
- 

Grey Goose | Net Trust: 17.88
- 

Jim Beam | Net Trust: 17.67
- 

Bacardi | Net Trust: 17.41



**Case Study by Emily Moquin**

Morning Consult Lead Food & Beverage Analyst

**Crown Royal achieves high trust by exemplifying its “Live Generously” slogan**

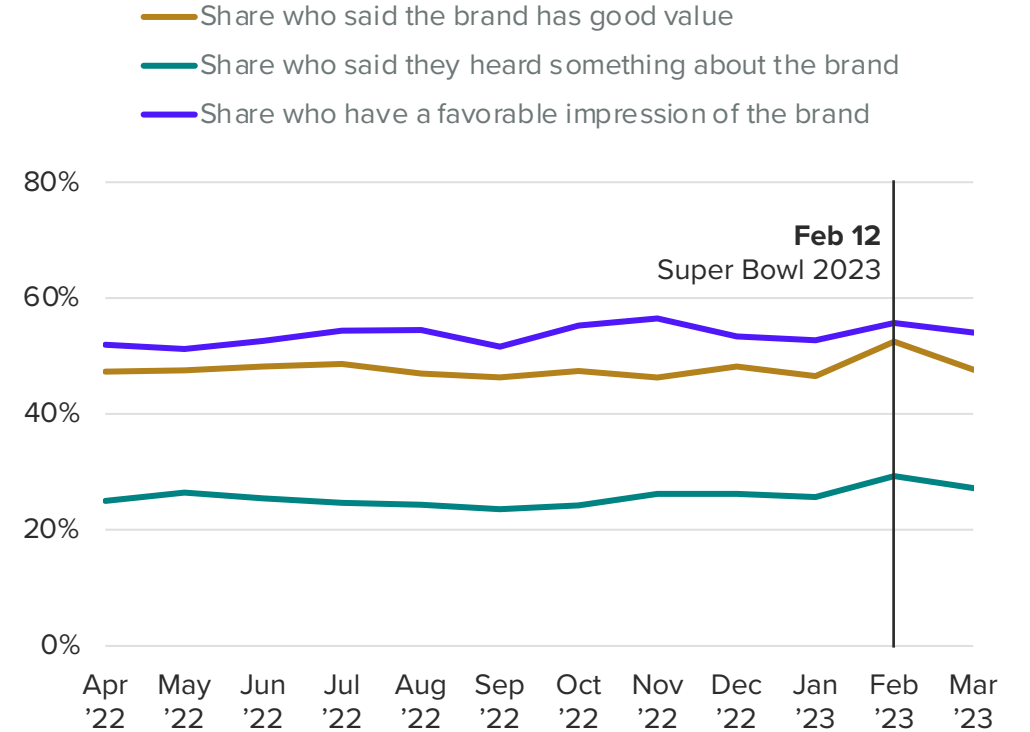
Crown Royal achieves the top spot on this year’s “Most Trusted Brands: Adult Beverage” list by consistently delivering on quality expectations.

Quality has been a central brand tenet since Crown Royal was invented for the King and Queen of England on a visit to Canada in 1939. In recent years, the brand has touted a karmic “Live Generously and Life Will Treat You Royally” message that likely helps solidify in consumers’ minds the brand’s intentions to do the right thing.

That message is more than just a slogan for the whisky brand. Crown Royal exemplifies living generously and simultaneously builds consumers’ trust with campaigns like The Purple Bag project, which sends care packages to active military troops.

Recent Super Bowl advertising also helped the brand stay relevant and top of mind with drinkers, earning a bump in both buzz and value.

**Value, buzz and favorability of Crown Royal among drinkers**

















# Most Trusted Brands: Banking, Investments and Payments

Payments brands dominate the list for the third year in a row, proving that consumers trust financial services brands that they interact with frequently and wherever they go.



## Top 12 Most Trusted Brands: Banking, Investments and Payments

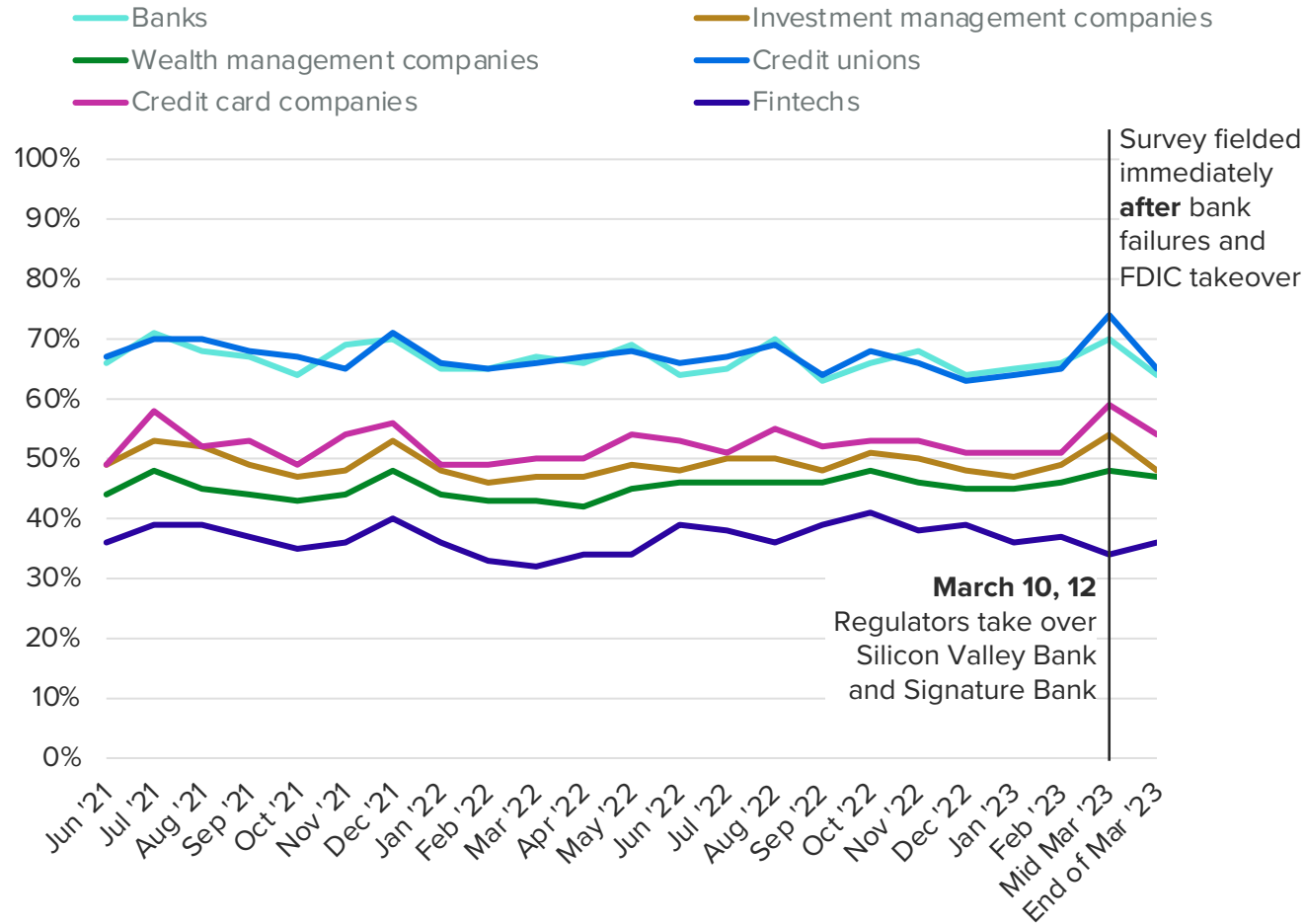
- |    |   |    |   |    |  |
|----|---|----|---|----|--|
| 1  | <br>Visa   Net Trust: 53.00        | 2  | <br>Mastercard   Net Trust: 44.71      | 3  | <br>PayPal   Net Trust: 43.89           |
| 4  | <br>TurboTax   Net Trust: 37.37    | 5  | <br>Credit Karma   Net Trust: 34.74    | 6  | <br>Google Pay   Net Trust: 34.26       |
| 7  | <br>USAA   Net Trust: 31.97        | 8  | <br>Chase   Net Trust: 30.86           | 9  | <br>American Express   Net Trust: 30.73 |
| 10 | <br>Apple Pay   Net Trust: 30.68 | 11 | <br>Western Union   Net Trust: 30.53 | 12 | <br>Venmo   Net Trust: 29.65          |

**Correction:** Due to a data error, Credit Karma and TurboTax were previously omitted from the top 10 banking list. This has since been rectified.

Source: Morning Consult Brand Intelligence

# Financial services trust has remained steady, but it must be protected

Share of U.S. adults who said they trust the following:



When it comes to specific types of financial services companies, banks and credit card brands are the most trusted by consumers. Consumers usually form relationships with these companies before other financial services brands and interact with them frequently. Plus, people tend to build long-lasting relationships with their chosen provider, and with that comes stability and trust.

That high trust was put to the test in the immediate aftermath of the rapid collapse of three U.S. banks in mid-March 2023. Consumers' trust in banks, investment management companies, wealth management companies and especially credit unions actually rose before returning to normal levels at the end of the month, signaling that they gave most of their providers the benefit of the doubt in terms of stability amid the banking collapse fallout.

Unfortunately, their optimism has limits – [65% of consumers](#) say they expect more banks to fail. As management teams look inward to shore up their financial stability, they must remain laser-focused on protecting the trust they have worked hard to gain.





**Case Study by Charlotte Principato**

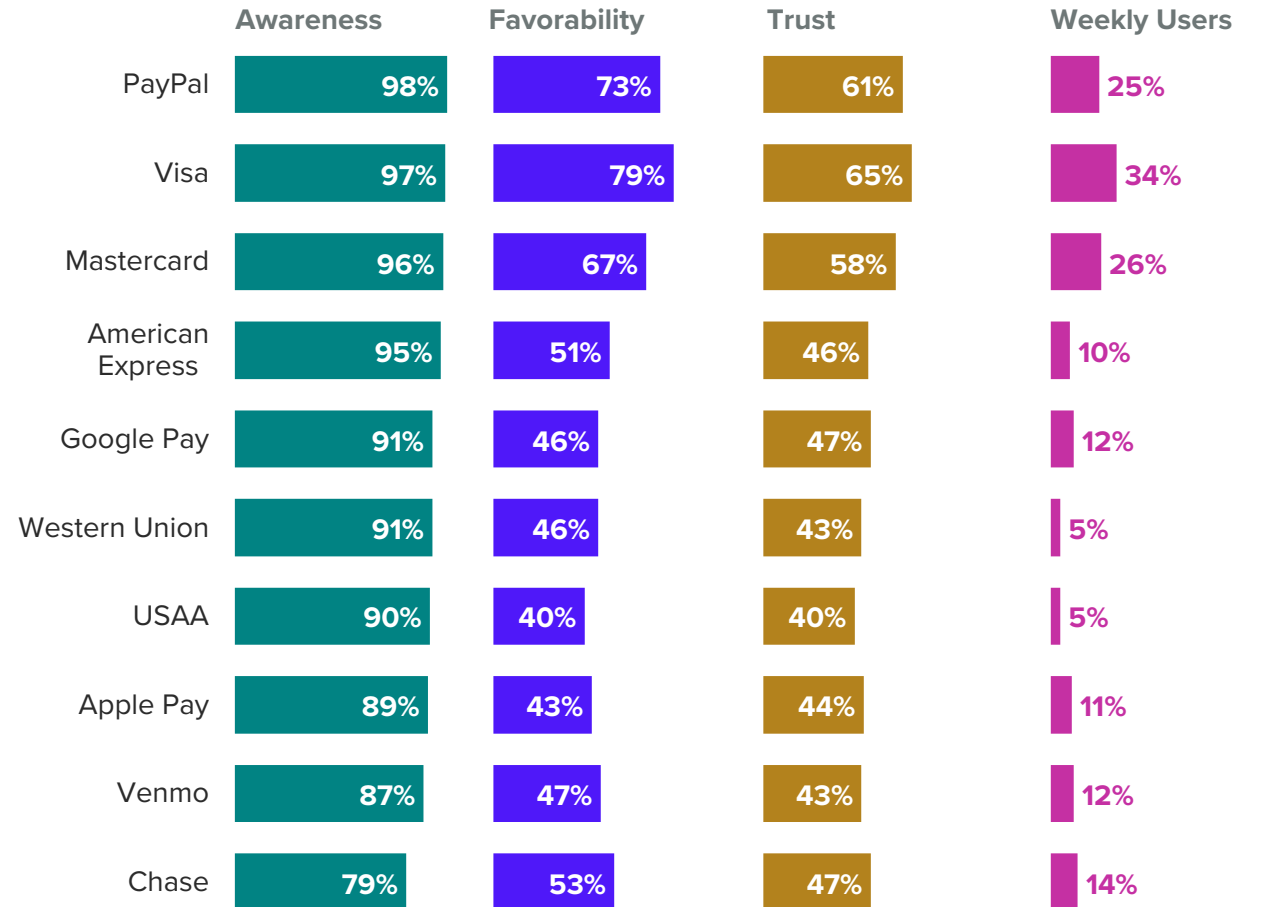
Morning Consult Lead Financial Services Analyst

**Visa proves frequent usage builds trust**

Visa has topped our list of most trusted banking, investment and payments providers for the past three years. It has the powerful combination of high awareness, high usage frequency and high favorability.

The brand is proof that user frequency is especially powerful in building trust, because it builds and maintains a stronger connection between the consumer and the brand. Every time a consumer taps their Visa card or sees the symbol in a storefront signaling that Visa is accepted there, they build a stronger positive association with the brand. The accumulation of those positive experiences is a bulwark against any potential negative buzz or events.

Share of U.S. adults who are aware, have favorable views, are trusting of and use the following brands weekly:



Source: Morning Consult Brand Intelligence





**Case Study by Charlotte Principato**

Morning Consult Lead Financial Services Analyst

**Massive bank branch presence helps Chase earn trust**

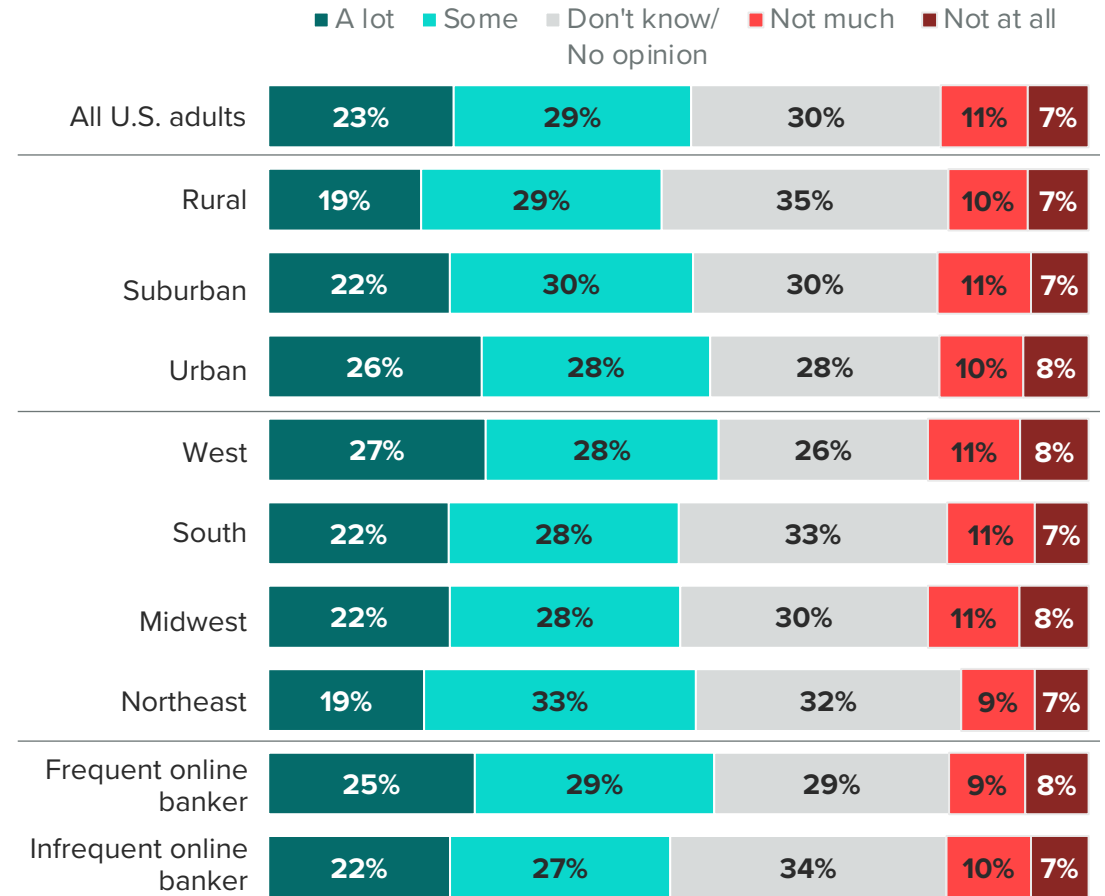
Of the top 10 largest U.S. banks, Chase is the only one to rank on the “Most Trusted Brands: Banking, Investments and Payments” list. Its high trust is due to its omnichannel approach to customer engagement, and mostly thanks to its wide branch distribution.

Branch presence is often considered the “old school” method of growing bank brand awareness and trust, but it continues to serve Chase well. Even in an age where most customers bank digitally, consumers still trust banks with strong branch networks — and Chase currently boasts the strongest, with more than 4,700 branches in 48 states.

Across communities, regions and consumers of different banking preferences, Chase has managed to create high trust and mitigate distrust through its omnichannel strategy.

Importantly, this strategy creates the most opportunity for building high usage frequency, a factor that helps payment bands secure high trust, and contributes to Chase’s as well.

**Trust responses among those who are aware of Chase, by demographic**



Source: Morning Consult Brand Intelligence





**Case Study by Charlotte Principato**

Morning Consult Lead Financial Services Analyst

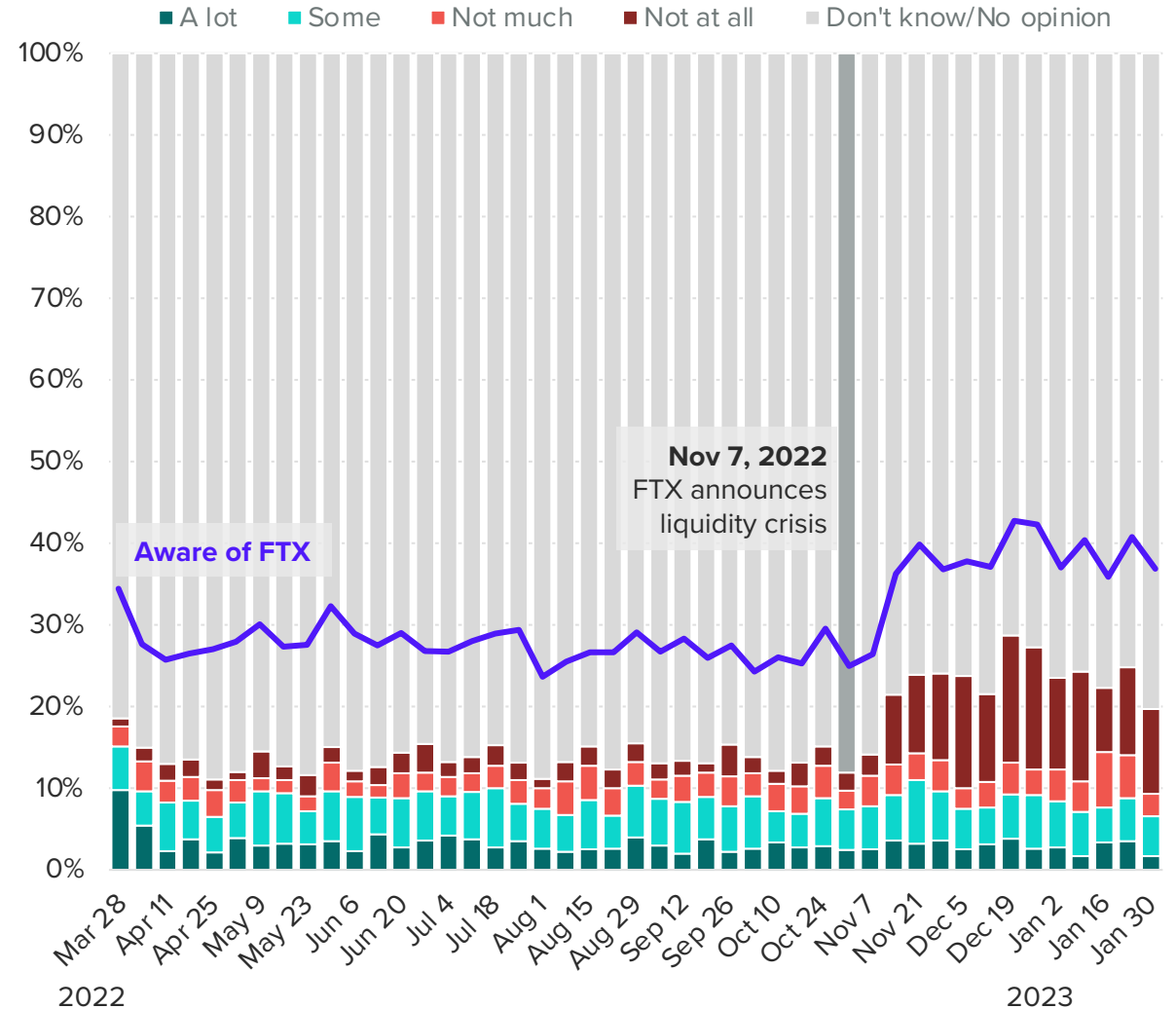
**FTX collapse serves as cautionary tale, shows why strong awareness and trust are crucial**

The crypto industry is a real-time case study in brand building as companies try to build a strong presence and control a narrative in an ever-changing environment. Unfortunately for FTX, it also offers a cautionary tale.

Management and liquidity issues aside, FTX’s brand downfall was its low awareness. A strong share of U.S. adults only heard of FTX as it was experiencing its liquidity crisis and filed for bankruptcy. These who became aware of the brand almost exclusively became trust detractors when they heard the news of FTX’s liquidity crisis; they had not had any experiences or knowledge of the brand that would motivate them to give FTX the benefit of the doubt.

As financial services brands, and banks especially, brace for more potential fall out from the collapse of three U.S. banks, they should focus on proactive outreach to raise overall awareness and bolster trust.

Share of U.S. adults who are aware of FTX and that trust FTX to do what is right



Source: Morning Consult Brand Intelligence



# Most Trusted Brands: Media & Entertainment

None of the brands in the “Most Trusted Brands: Media & Entertainment” ranking built a name reporting on politics, helping them avoid the mistrust many news networks receive due to alleged political bias. Beyond a non-news focus, most of the brands on this list either are available for free or recently introduced a lower-priced offering, like Netflix and Disney+’s ad tiers in late 2022.



## Top 10 Most Trusted Brands: Media & Entertainment



The Weather Channel | Net Trust: 52.50



Sony | Net Trust: 47.11



YouTube | Net Trust: 44.56



Netflix | Net Trust: 41.89



Prime Video | Net Trust: 41.33



Hulu | Net Trust: 40.16



Pixar | Net Trust: 38.41



Roku | Net Trust: 37.49



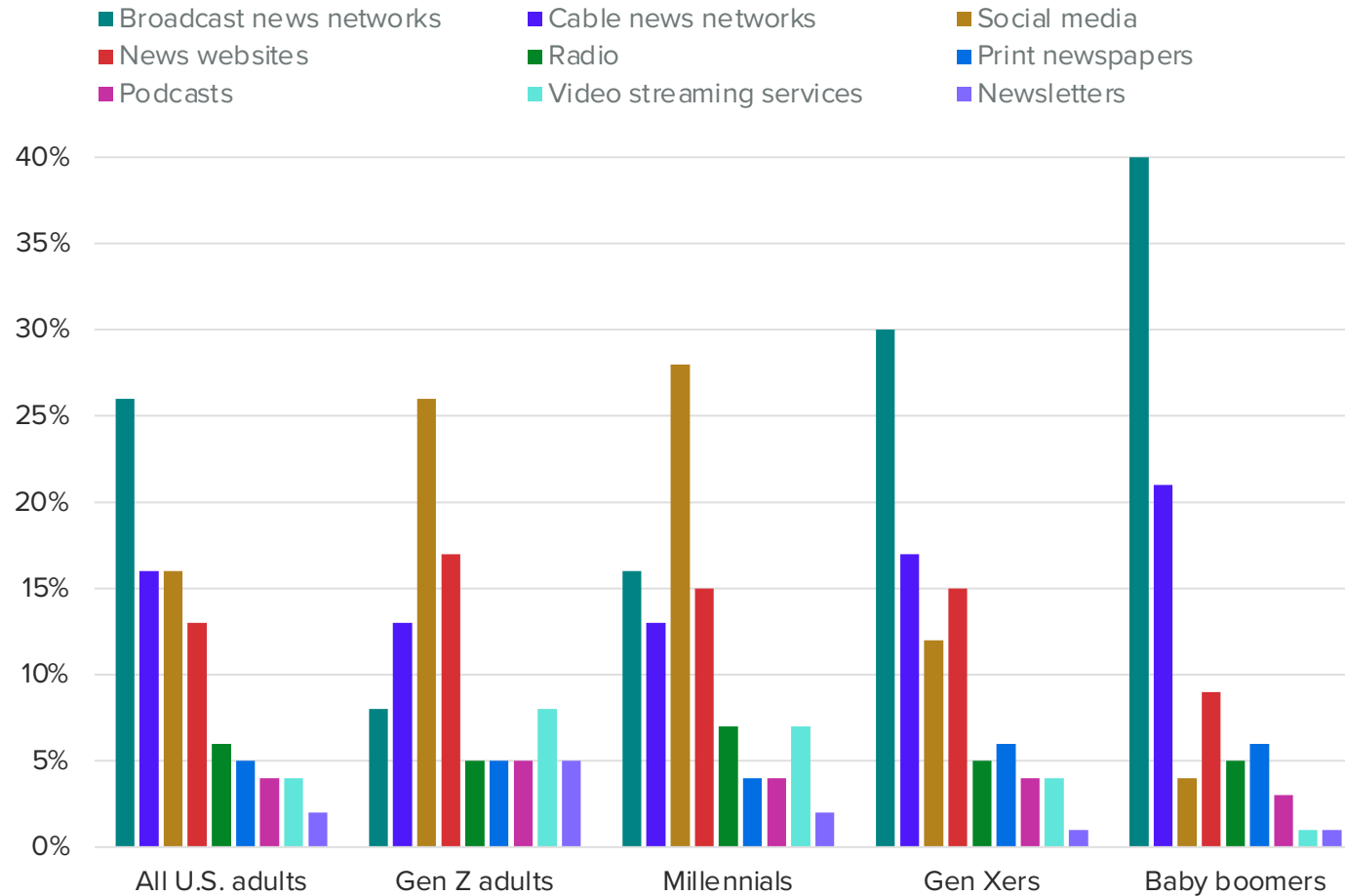
Nintendo | Net Trust: 35.56



Disney+ | Net Trust: 34.97

# How media brands can build trust among audiences

Shares of consumers in March 2023 who said each platform offered the most trustworthy news source:



For any media brands — not just news networks — looking for a trust boost, traditional TV networks and other legacy media still have a big role to play.

The top three news sources that U.S. adults trust are broadcast networks, cable networks and social platforms. Even for younger cohorts — Gen Z’s top three are social media, websites and cable networks — traditional media is still important for building credibility. A smaller media brand that garnered favorable coverage on a national news network for a recent release would gain trust among all adults and Gen Zers.

For brands that are focused on targeting younger consumers, it’s important to to be discoverable on TikTok, since Gen Z [uniquely views it](#) as a news discovery platform. Influencers talking about pop culture news and recent releases could drive traffic to media brands on TikTok, a phenomenon that would ultimately boost the buzziness of a title and increase the chances that other news platforms cover reception of it.





**Case Study by Kevin Tran**

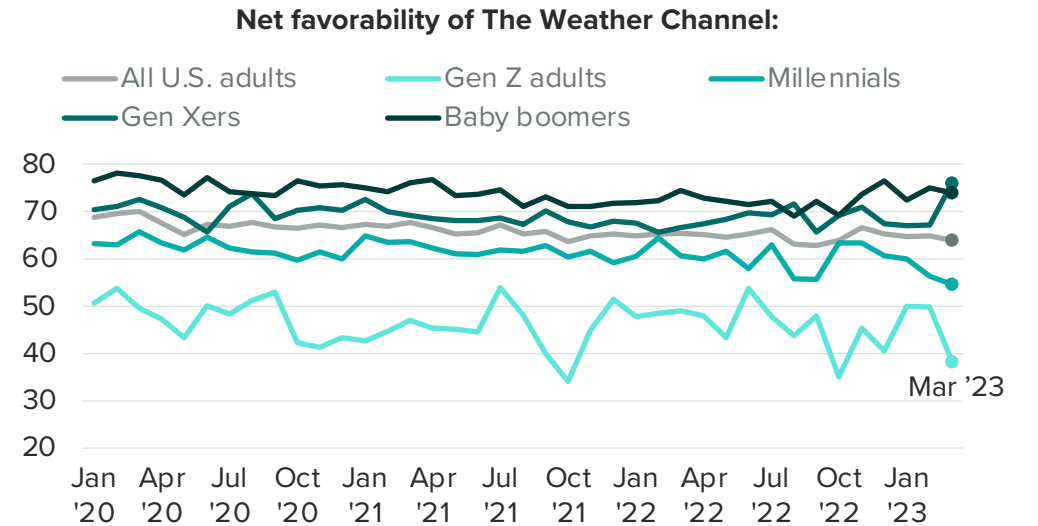
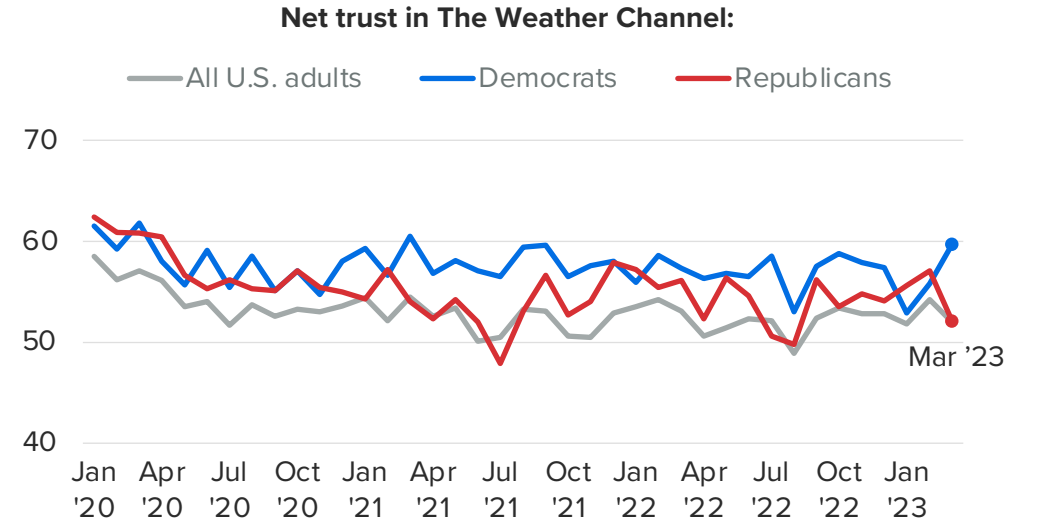
Morning Consult Media & Entertainment Analyst

**The Weather Channel is poised to capitalize on younger generations' climate change concerns**

Consumers develop a particularly intimate relationship with their weather forecaster since they're crucial for planning social events, and The Weather Channel is clearly differentiated in the space because of its legacy, which includes launching the first 24-hour cable weather network in 1982. Since then, TWC has managed to remain a highly trusted media brand through more recent initiatives, launching a streaming service and undertaking a partial sale to IBM that strengthened its forecasting capabilities.

TWC also benefits as a media brand by not having to cover politics outright — despite acknowledging climate change in its coverage — as evidenced by the relatively similar levels of trust it has across party lines.

Still, the company could do more to boost its profile among younger demos, who don't favor the brand as much as older ones — such as commissioning new climate change-focused docuseries and licensing them to major streamers. After all, younger adults are more likely to care about climate and consumers broadly will likely continue to view climate change as an increasing threat over the next decade.

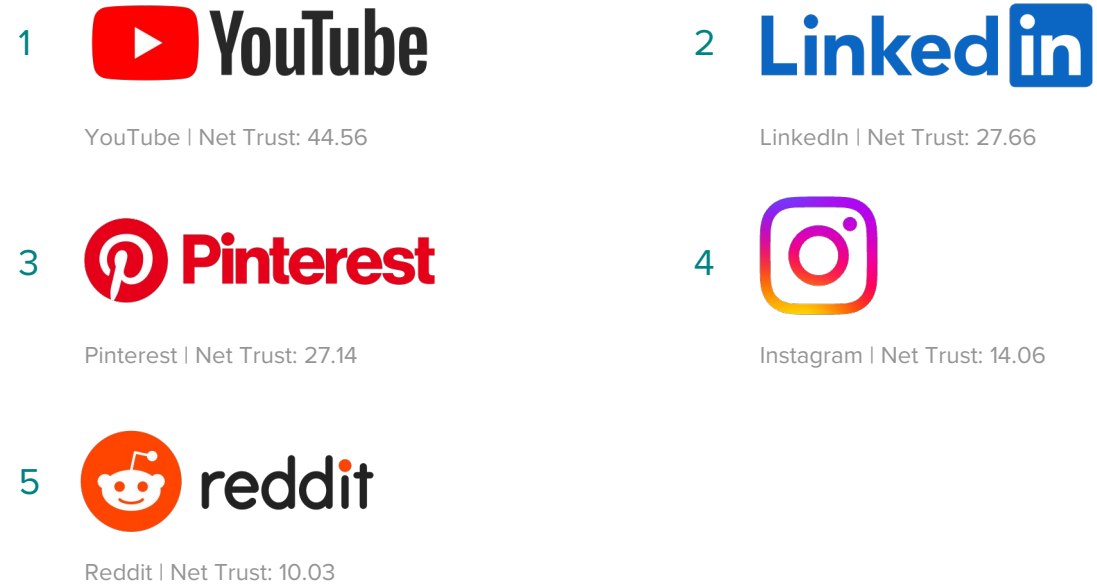


Source: Morning Consult Brand Intelligence

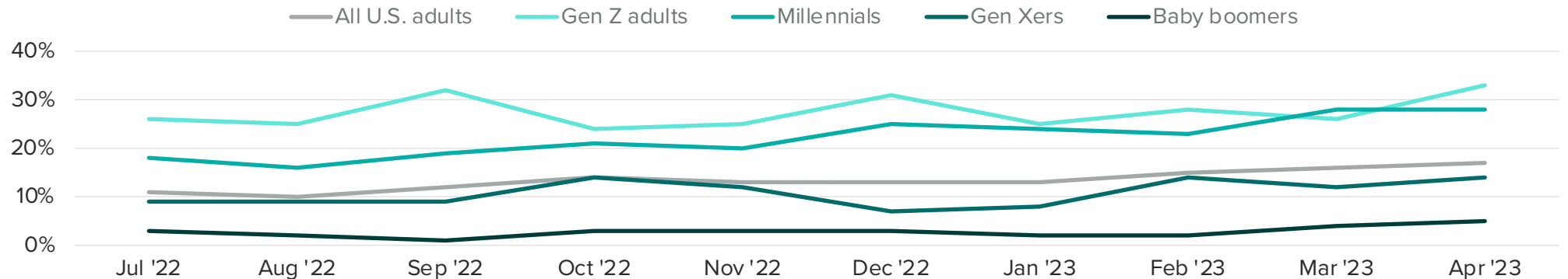
# Most Trusted Brands: Social Media

Social platforms can't ease up on their fake news fight: A September Morning Consult [survey](#) found 35% of social media users said limiting fake news was a "major reason" they trusted social platforms, much higher than other major factors like celebrities using the platform (16%). This underscores the importance of financially incentivizing leading digital media publishers to post on social platforms, given these news brands' cachet among Gen Zers and millennials and the fact that these cohorts favor social media as a news source.

Top 5 Most Trusted Social Media Brands: All U.S. Adults



Shares who said they think social media offers the most trustworthy news sources:





**Case Study by Kevin Tran**

Morning Consult Media & Entertainment Analyst

**YouTube’s short-form video success could eventually hurt trust in the platform**

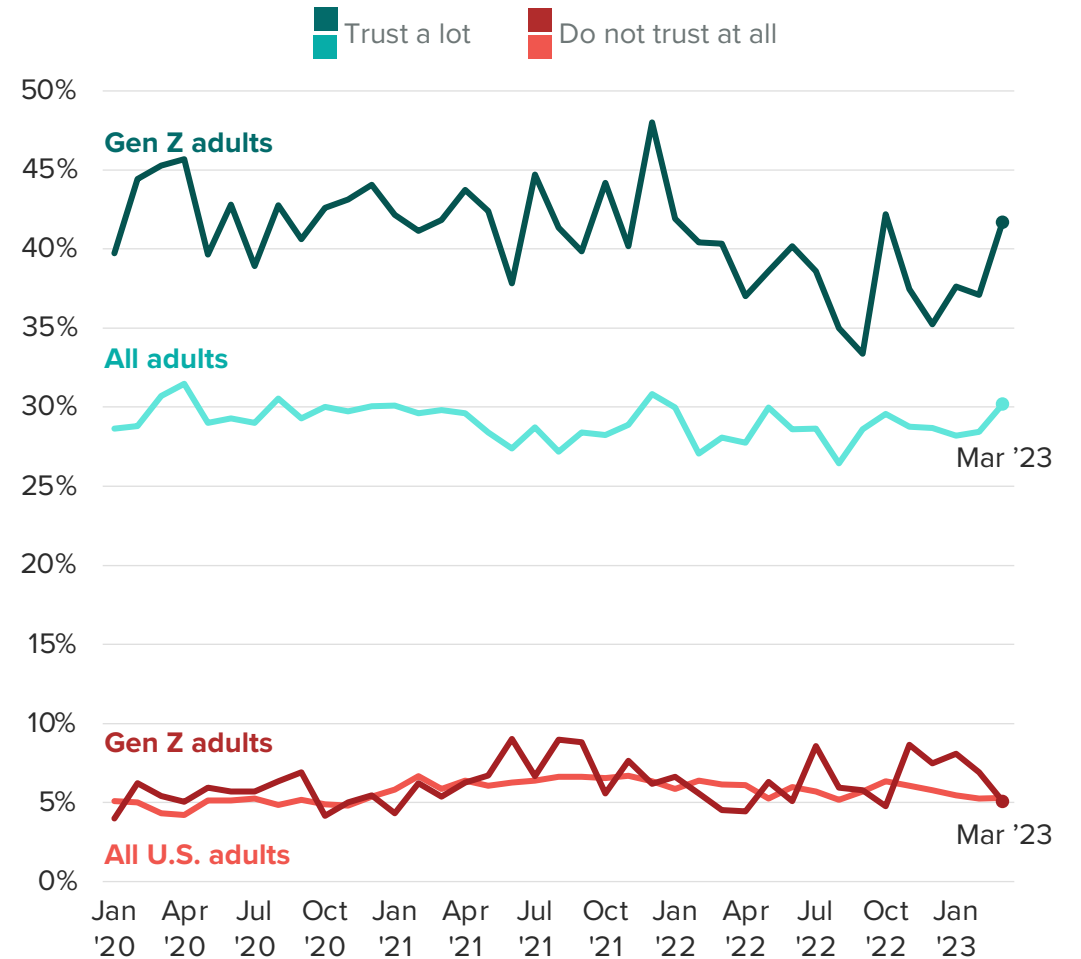
YouTube has [long been](#) the most trusted social network in the United States because of the natural guardrails that shield users from the unpleasant experiences they’d be exposed to elsewhere: There’s no direct message feature and many users adopt pseudonyms without profile pictures, which severely limits the volume and intensity of harassment many users can face elsewhere.

Counterintuitively, the biggest reason YouTube would lose its spot as the most trusted social media brand is its own success. As YouTube Shorts grows, there’s an opportunity for low-credibility news content to proliferate on the platform and subsequently ding user trust.

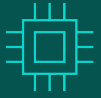
This could be damaging to the particularly high level of trust Gen Zers already have in YouTube. Younger consumers are more likely than the generation population to trust YouTube because the former are more likely to favor social media as a news source. Therefore, YouTube would benefit by spotlighting credible independent news commentators on its platforms to Gen Z, which, unlike any other generation, [views](#) its short-form video rival TikTok as a leading social platform for news information.

Source: Morning Consult Brand Intelligence

**Trust of YouTube**







# Most Trusted Brands: Technology

This year's most trusted brands in tech are familiar names: Amazon, Google and Samsung. They keep us connected, entertained and informed, and help us be productive. But trust in tech isn't much of a given anymore. The industry has had a tumultuous several months, shaking trust among consumers, and regaining that trust will be critical this year as regulatory and economic threats continue to loom.



## Top 10 Most Trusted Brands: Technology

1 **amazon**

Amazon | Net Trust: 54.51

2 **Google**

Google | Net Trust: 51.86

3 **SAMSUNG**

Samsung Electronics | Net Trust: 48.10

4 **Microsoft**

Microsoft | Net Trust: 45.08

5 **YouTube**

YouTube | Net Trust: 44.56

6 **LG**

LG | Net Trust: 43.13

7 **hp**

HP | Net Trust: 39.99

8 **Apple**

Apple | Net Trust: 38.67

9 **DELL**

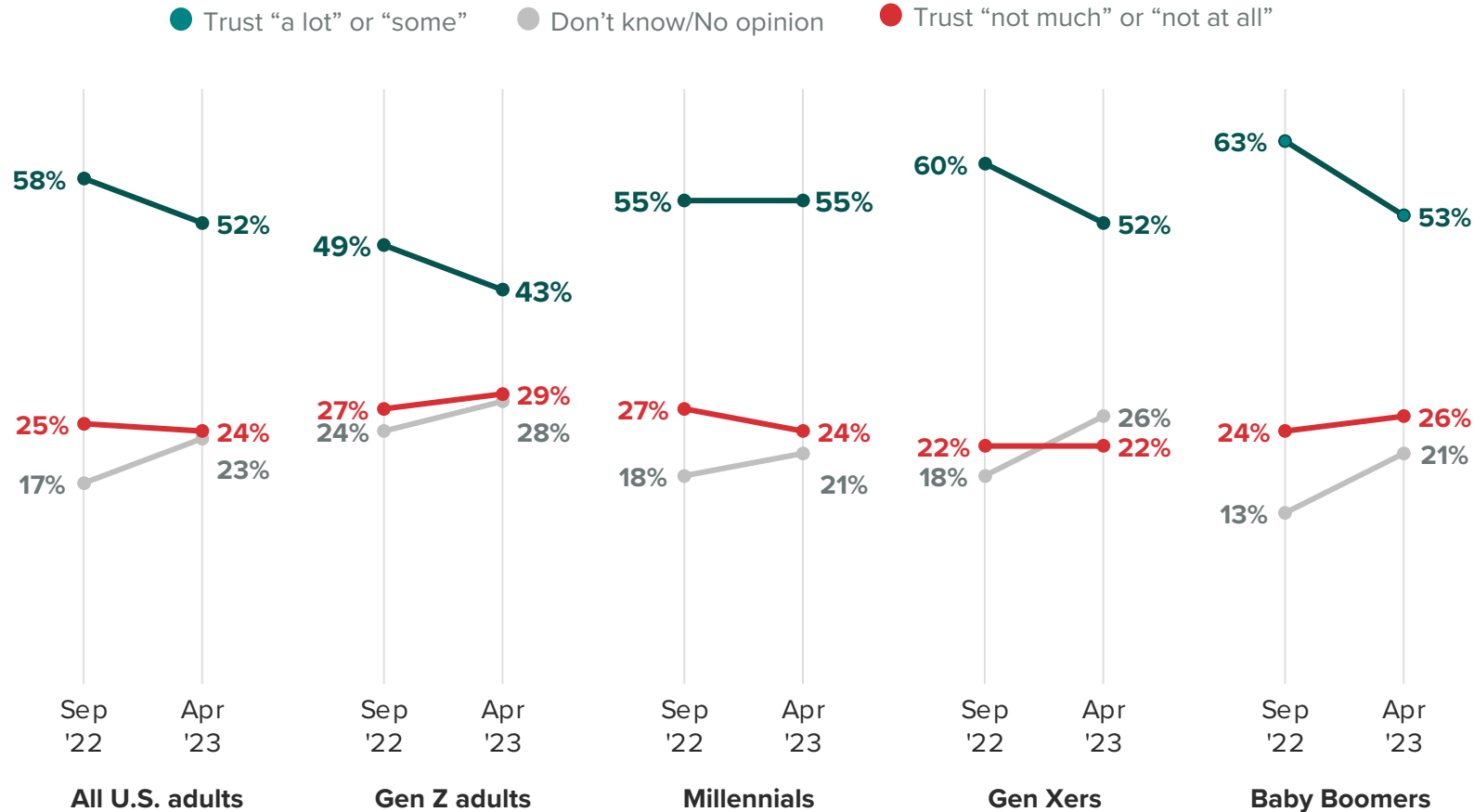
Dell | Net Trust: 38.45

10 **zoom**

Zoom | Net Trust: 37.36

# During a tough year for tech, maintaining trust remains critical

Shares who said whether they trust major technology companies to do what is right



Layoffs, the end of interest-free money, chaos at Twitter, the collapse of Silicon Valley Bank, antitrust and many other factors have battered the tech industry over the past several months.

The net result is that, unsurprisingly, trust in tech is down. However, it's not so much that people now distrust tech — they've just become more ambivalent.

Instead of being down and out, tech companies have an opportunity to maintain and rebuild trust this year at a critical moment for the industry. Shoring up public trust has the potential to reduce the sting of regulatory threats in the form of [Section 230 reform](#) and antitrust. And with AI being developed at a rapid clip, [trust will be a critical component](#) in its success or failure.



**Case Study by Jordan Marlatt**

Morning Consult Lead Tech Analyst

**Microsoft has an opportunity to build trust with Gen Z**

Microsoft is the No. 4 most trusted tech brand this year, and with good reason: In recent years, it made big bets that kept the brand relevant. Its next gamble is on AI in a bid to reimagine online search and tackle Google’s hold on the market.

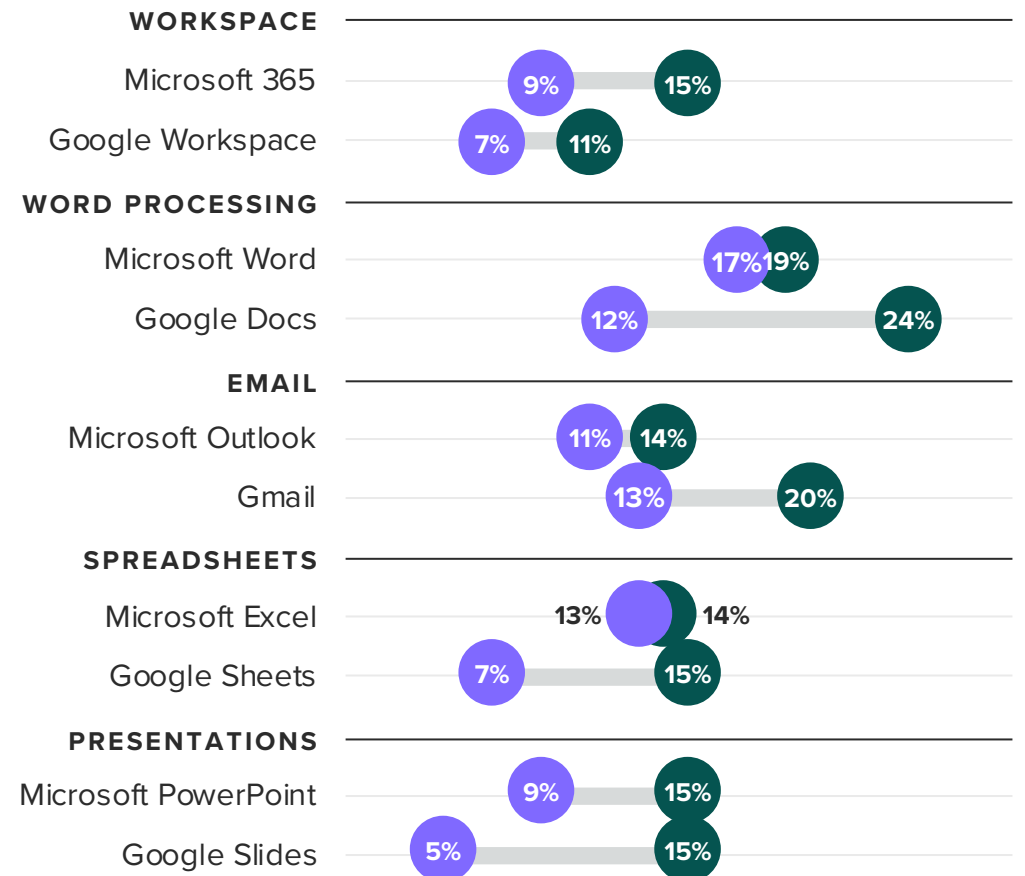
But, it will take more than reimaging search for Microsoft to shore up its future position. Google has more of a commanding presence in consumers’ digital lives, and it’s reflected in its No. 2 status on our most trusted brands list. And more importantly, Google’s dominance is particularly strong among Gen Z adults, who represent the lion’s share of university students and are becoming larger parts of the workforce. While millennials and older adults grew up with Microsoft Office products in their studies and work, Gen Zers are relying more heavily on apps within Google’s workspace suite relative to older peers.

As Microsoft looks to the future, ensuring its brand remains relevant with tomorrow’s workforce will be a key part of maintaining its status as a most trusted brand.

Source: Morning Consult Brand Intelligence

**Weekly users of the following:**

● Gen Z adults ● Millennials and older





### Case Study by Jordan Marlatt

Morning Consult Lead Tech Analyst

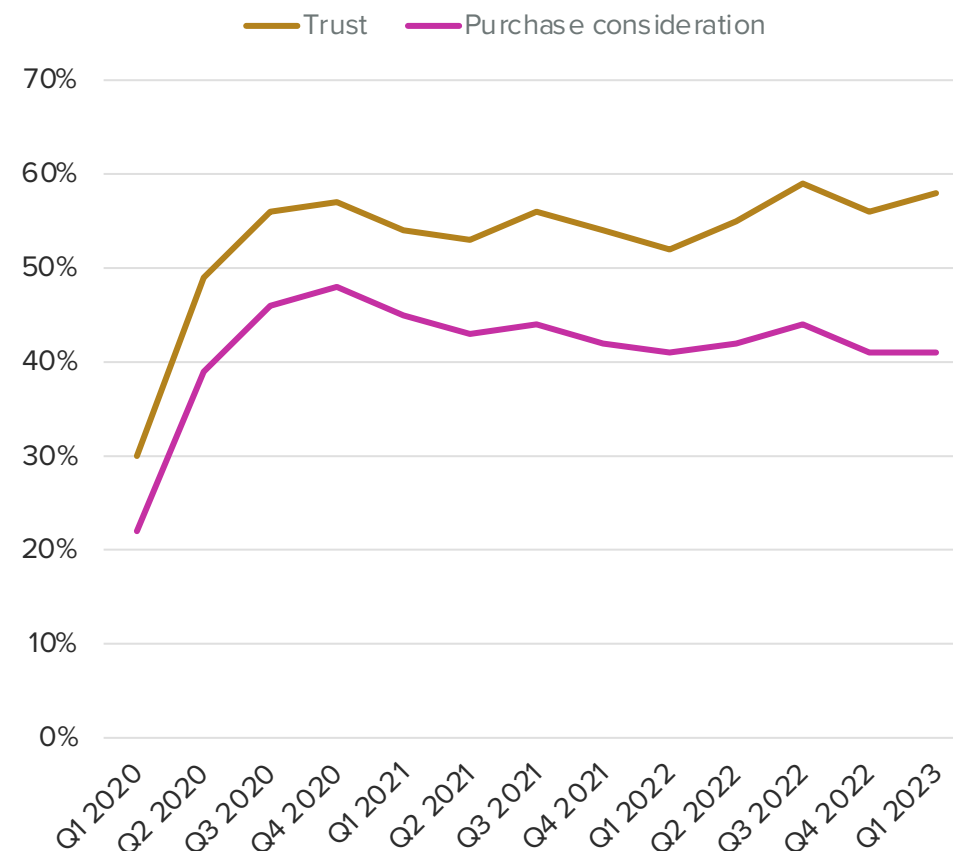
## Zoom solidifies its status in Americans' minds

Three years after the beginning of the pandemic lockdowns, Zoom is not only a household name but now a verb in and of itself, usurping Skype as the genericization for video-conferencing someone. Its ubiquity in our professional and social lives is one of the reasons it's the No. 10 most trusted tech brand in the United States this year.

Despite the platform's struggles with investors, trust in Zoom among consumers remains high and is even on the rise. Managers and above at companies are particularly fond of Zoom, with more than 40% of managers and above saying they would consider buying from Zoom.

However, Zoom faces two obstacles: One is the competition from Slack, Teams and other workplace communication services; and the other is the diminishing shares of remote workers. According to a [recent Morning Consult report](#), 35% of employed adults work remotely or in hybrid situations, and an even larger share (52%) said they prefer to work remotely or in a hybrid environment, though this number has declined since last year, posing a challenge for Zoom if this trend continues.

### Trust and purchasing consideration for Zoom among managers and above:





**Case Study by Jordan Marlatt**

Morning Consult Lead Tech Analyst

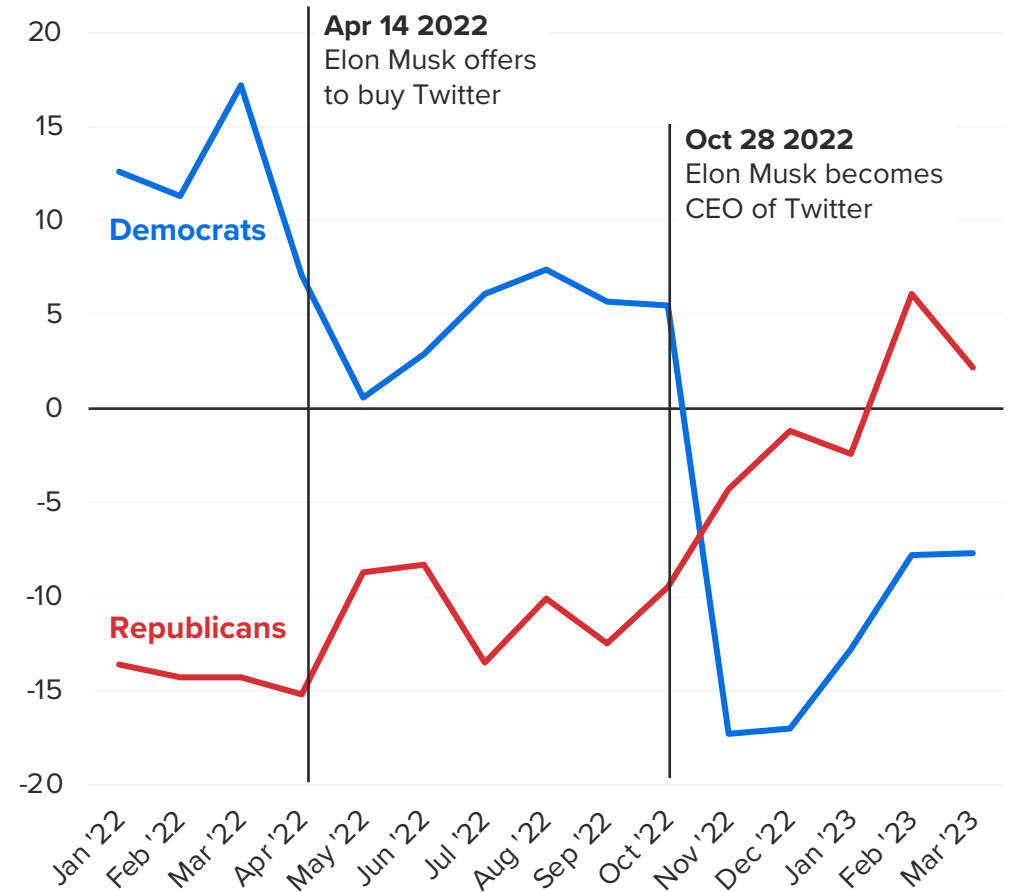
**Twitter chaos shows importance of trust**

Twitter did not make the cut for the “Most Trusted Brands: Tech” ranking this year — the social media platform instead holds the penultimate position on the list. Its volatile year is one of the finest examples of why trust is important, and the influence that CEOs can wield on a brand.

Elon Musk’s offer to buy Twitter in April 2022 and eventual takeover in October the same year set off a cascading decline in trust in the platform among Democrats. The chaos of mass layoffs, ever-changing moderation rules (or lack thereof), instability of the platform and unclear direction of the company not only impacted trust among left-leaning users, but among its advertisers as well.

In recent weeks, Elon Musk has attempted to woo advertisers back to the platform after many indefinitely paused their Twitter advertising, but pricey API access (reported to cost \$42,000 a month) and a new requirement that advertisers must pay to be verified don’t seem to be winning these companies back. Twitter will need to prove to advertisers that advertising on the platform isn’t risky for brands (such as the potential for ads to be shown alongside hate speech) and prove to them again the value of advertising to its users.

**Net trust in Twitter by party identification**



Source: Morning Consult Brand Intelligence



# Most Trusted Universities

In this year's Most Trusted Universities research — measured among the top 135 doctoral research universities featured in the U.S. News and World Report's 2022 Best National University rankings — trust as a metric of academic reputation gained even more prominence among key stakeholders of universities, such as parents, students and employers.



## Top 10 Most Trusted Universities: All U.S. Adults

1  **JOHNS HOPKINS**  
UNIVERSITY

Johns Hopkins University | Net Trust: 58.57

2  **Massachusetts**  
**Institute of**  
**Technology**

MIT | Net Trust: 50.47

3 **Stanford**

Stanford University | Net Trust: 47.68

4  **Cornell University**

Cornell University | Net Trust: 46.10

5  **PRINCETON**  
**UNIVERSITY**

Princeton University | Net Trust: 45.80

6  **UNIVERSITY OF**  
**NOTRE DAME**

University of Notre Dame | Net Trust: 45.72

7 **Yale**

Yale University | Net Trust: 44.96

8 **Duke**

Duke University | Net Trust: 44.81

9  **Baylor University**

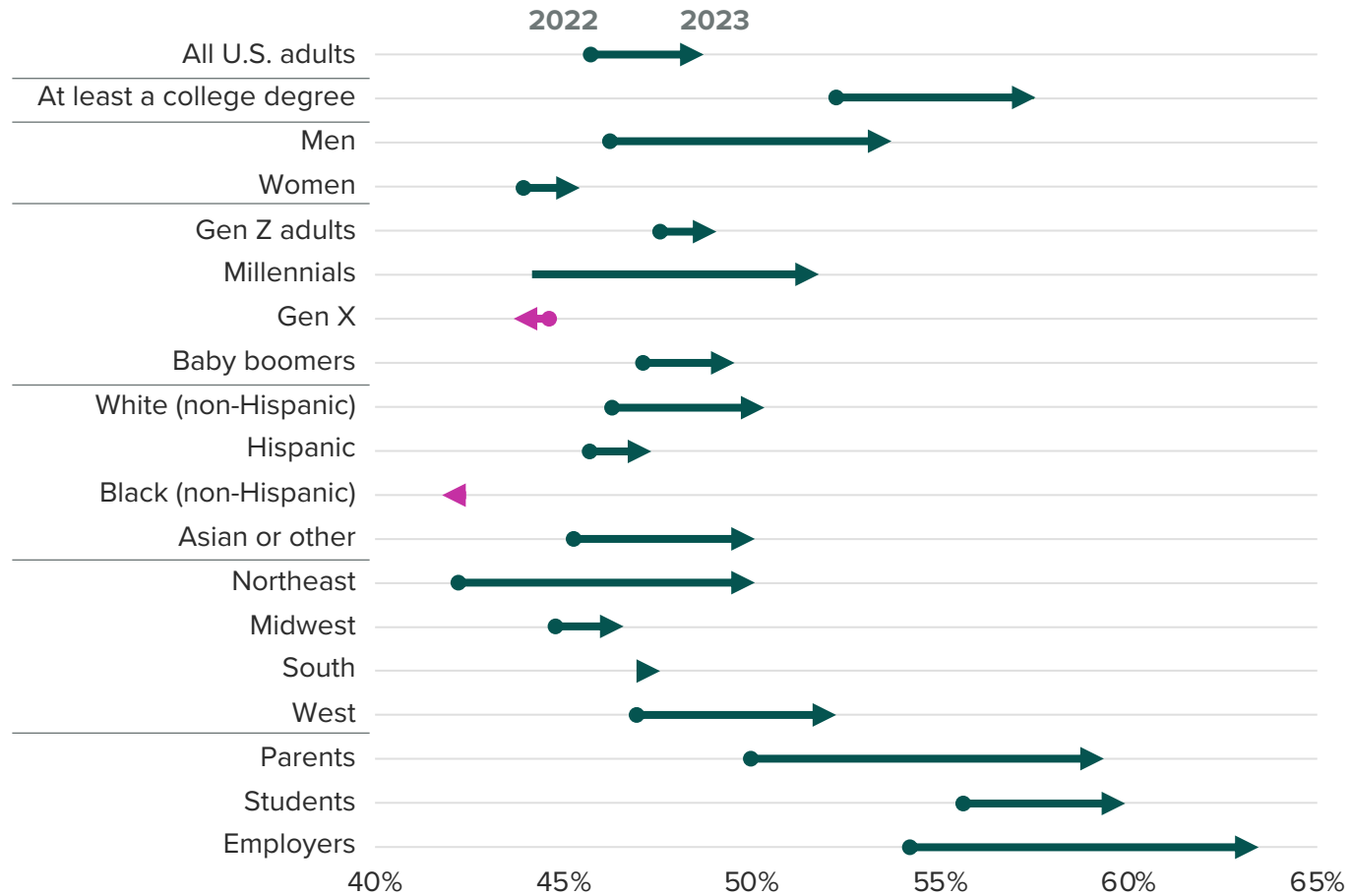
Baylor University | Net Trust: 44.59

10 **Northwestern**

Northwestern University | Net Trust: 43.93

# Why trust matters for universities

Shares of respondents who said that public trust will play a more important in determining the academic reputation of a college or university 10 years from now



Trust is a key success metric for many higher education institutions that continue to face enrollment headwinds due to the declining number of high school graduates and increasing questions about the value of a college degree, especially among men. According to the Bureau of Labor Statistics, the share of male high school graduates enrolled in college declined by 12.5 points in five years, from 67.4% in 2016 to 54.9% in 2021. In contrast, this decline was only 2.4 points for female high school graduates (71.9% to 69.5%). This indicates that the college enrollment gap has widened between male and female students to nearly 15 points in 2021.

Our survey data shows that the importance of trust among the public increased by 3 points year over year, a figure that ticks up among millennials, parents and employers.

There's also a notable gender gap, with more men than women elevating the importance of trust. This suggests that higher education institutions need to put more effort into earning men's trust, especially in a tight labor market.





**Case Study by Rahul Choudaha, Ph.D.**

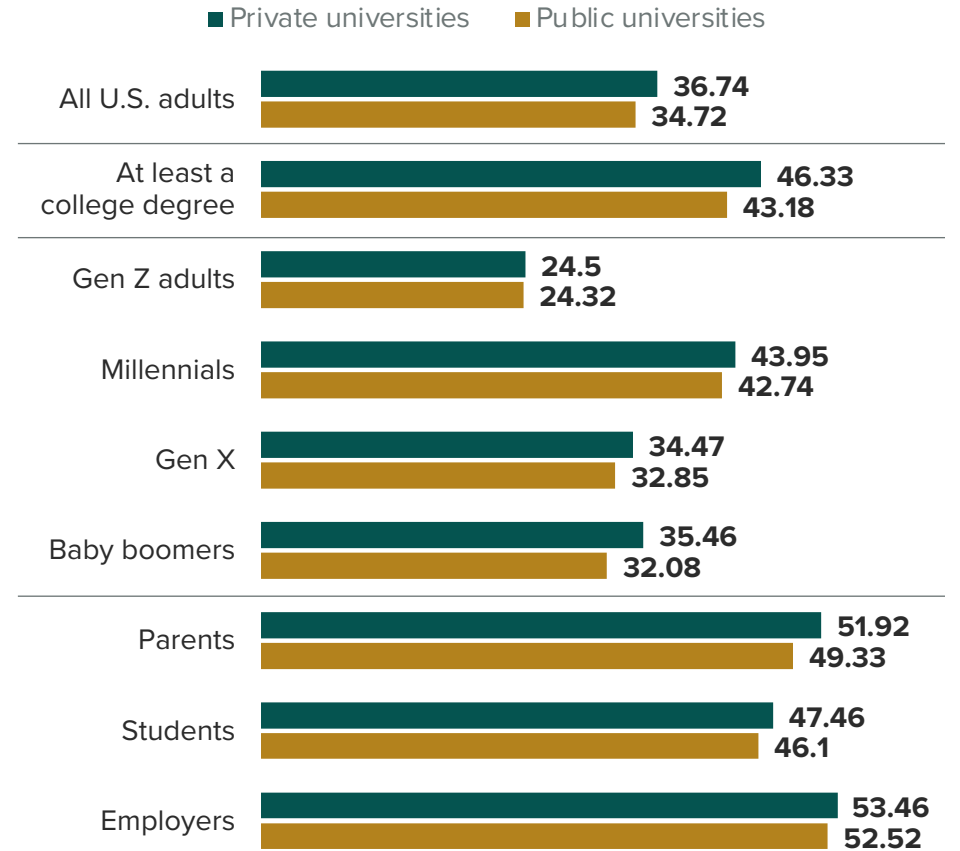
Morning Consult Account Portfolio Leader, Higher Education

**Trust for public universities slightly lags that of private universities amid political pressures**

While private universities dominate the overall ranking of “Most Trusted Brands: Universities,” public institutions are more a part of the public’s life: They enroll nearly 3 in 4 students in higher education. In this survey, net trust among the 63 public universities we surveyed was 2 points lower than the average for the 72 private universities included (34.72 points vs 36.74 points, respectively). This gap slightly widens as we look at some key demographics, including respondents with at least a college degree and baby boomers.

One of the possible reasons for lower trust levels for public universities is the political pressure they face in some of the states that aim to control academic freedom, faculty tenure and diversity initiatives. In this context, activities such as college athletics can help engage the wider community at local and national levels. [Previous analysis](#) shows that universities with elite college athletics teams have commanded a higher net trust. For example, among Republicans, public universities with a presence in the Power Five conference have a nearly 6-point lead in net trust as compared to non-Power Five universities (16.08 points vs. 10.15 points, respectively).

**Average net trust by university type**







**Case Study by Rahul Choudaha, Ph.D.**

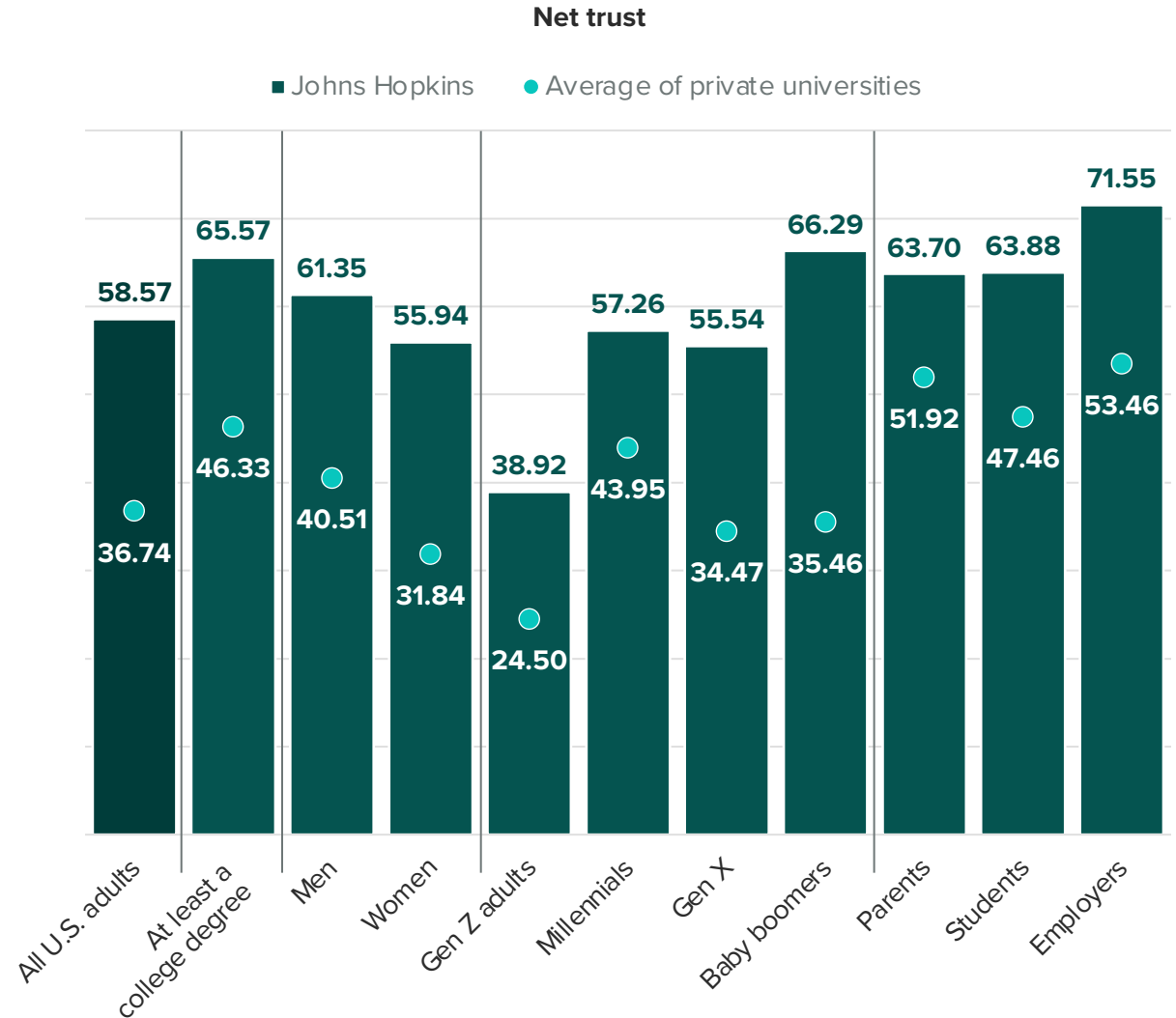
Morning Consult Account Portfolio Leader, Higher Education

**Johns Hopkins University earns high net trust across key demographics**

Johns Hopkins University claimed the top spot on the “Most Trusted Brands” Universities” list — and by a high margin. Among all adults, the university net trust rating of 58.57 was nearly 22 points higher than the average of all private universities.

One of the areas of strength for the university was the high level of trust among a diverse range of stakeholders, which is likely to be driven by the wide visibility the university received due to its public health outreach through the COVID-19 dashboard during the pandemic. Hopkins did very well across different regions and races and ethnicities. The net trust levels were even higher among adults with at least a college degree and parents, students, and employers.

An area of growth for the university: Gen Z. Although Hopkins scored higher than the average private university, its net trust score for the cohort is roughly 20 points lower than among the general population.



Survey conducted April 3-9, 2023, among a representative sample of 11,010 U.S. adults, with an unweighted margin of error of +/-1 percentage point.





# Most Trusted Nonprofits

Many of the biggest names in the nonprofit space continue to dominate the list of Most Trusted Nonprofits this year, highlighting trust for nonprofits is first and foremost based on top-of-funnel awareness.

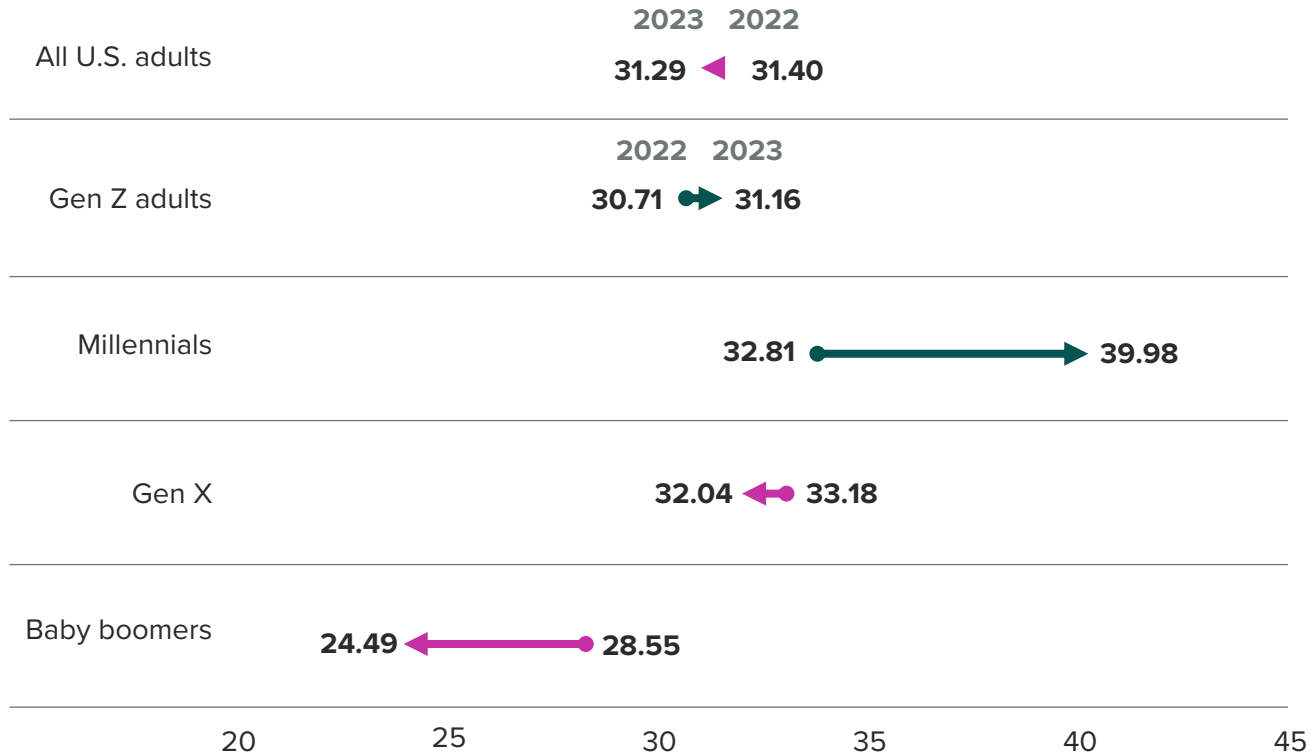


## Top 10 Most Trusted Nonprofits: All U.S. Adults

- |   |   |    |   |
|---|---|----|---|
| 1 |  <p><b>St. Jude Children's<br/>Research Hospital</b></p> <p>St. Jude Children's Research Hospital   Net Trust: 80.40</p>             | 2  |  <p><b>Make-A-Wish</b></p> <p>Make-A-Wish   Net Trust: 76.32</p>                                       |
| 3 |  <p><b>American<br/>Cancer<br/>Society</b></p> <p>American Cancer Society   Net Trust: 73.21</p>                                     | 4  |  <p><b>American<br/>Heart<br/>Association</b></p> <p>American Heart Association   Net Trust: 72.85</p> |
| 5 |  <p><b>RMHC</b></p> <p>Ronald McDonald House Charities   Net Trust: 70.46</p>  | 6  |  <p><b>Special<br/>Olympics</b></p> <p>Special Olympics   Net Trust: 70.41</p>                         |
| 7 |  <p><b>Shriners Hospitals<br/>for Children</b><br/>Love to the rescue.</p> <p>Shriners Hospitals for Children   Net Trust: 70.24</p> | 8  |  <p><b>Habitat<br/>for Humanity</b></p> <p>Habitat for Humanity   Net Trust: 69.67</p>                 |
| 9 |  <p><b>Big Brothers Big Sisters</b><br/>OF AMERICA</p> <p>Big Brothers Big Sisters of America   Net Trust: 67.66</p>               | 10 |  <p><b>American<br/>Red Cross</b></p> <p>American Red Cross   Net Trust: 67.51</p>                   |

# A generational “changing of the guards” is looming for nonprofits

Instinctive net trust\* by generation



Nonprofits have long relied on older Americans as a donor base. While this group will still be crucial to consider, older Americans appear to be losing trust in nonprofits. Baby boomers' instinctive trust in nonprofits is down 4 points year over year, while millennials' instinctive trust is up 7 points.

This shift in overall nonprofit trust for baby boomers is also recognized at the specific nonprofit level. Across the 50 tested nonprofits, baby boomer trust is down an average of 4 points. In contrast, millennial trust is up an average of 3 points (Gen Z and Gen X average trust remained largely stable year over year, at 0 points and -1 point, respectively).

In appealing to a younger donor base, nonprofits will have to think differently about how they both reach and message to this new guard.

Source: Morning Consult Research Intelligence. Shares represent those who said, “I tend to trust nonprofits. They have to do something bad to lose my trust” minus the shares who said “I tend to not trust nonprofits. They have to earn my trust.”





**Case Study by Caroline Bye**

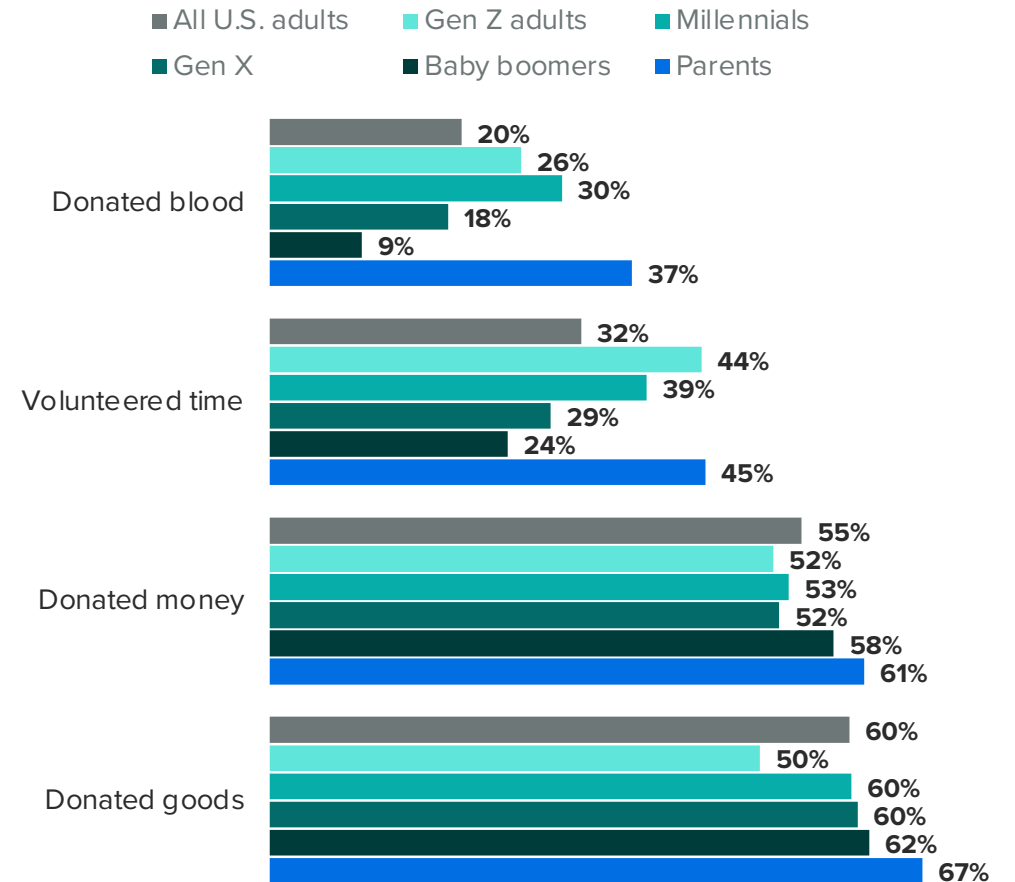
Morning Consult Business Portfolio Leader, VP

**Remember all the ways to engage — and keep an eye on millennials**

While U.S. adults reported similar monetary donation habits in the past 12 months compared with the previous 12 months, there was a 6-point increase in the share of adults who reported volunteering time to a nonprofit. As consumer comfort with COVID-19 increases and fears wane, the public wants to find ways to reconnect to their communities, and what better way than volunteering for a nonprofit?

Continuing to think about the new guard of donors, it will be important to keep millennials top of mind. This generation is raising both young Gen Zers and Gen Alpha. On top of that influence, our data shows that millennials are more likely to engage with nonprofits right now: Across generational cohorts, millennials saw the most year-over-year growth across the donation categories (blood: +8%, time: +8%, money: +4%, goods: +6%).

**Shares who said that in the past 12 months, they have given to a nonprofit in any of the following ways:**





**Case Study by Caroline Bye**

Morning Consult Business Portfolio Leader, VP

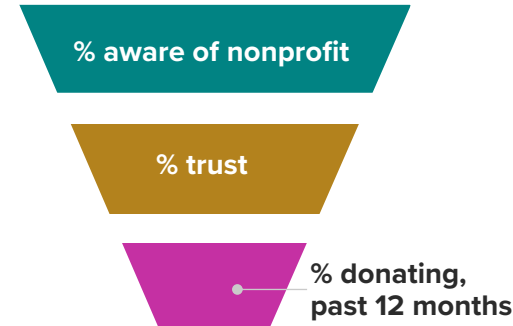
**Diversification drives donation funnels for top-performing nonprofits**

It’s hard to not notice a trend when looking at the four top-performing brands by reported donations. Goodwill, The Salvation Army and American Red Cross all engage with consumers outside of monetary donations and fundraising efforts. These four nonprofits also tout near-universal awareness, which is the crucial first step to get to trust-building.

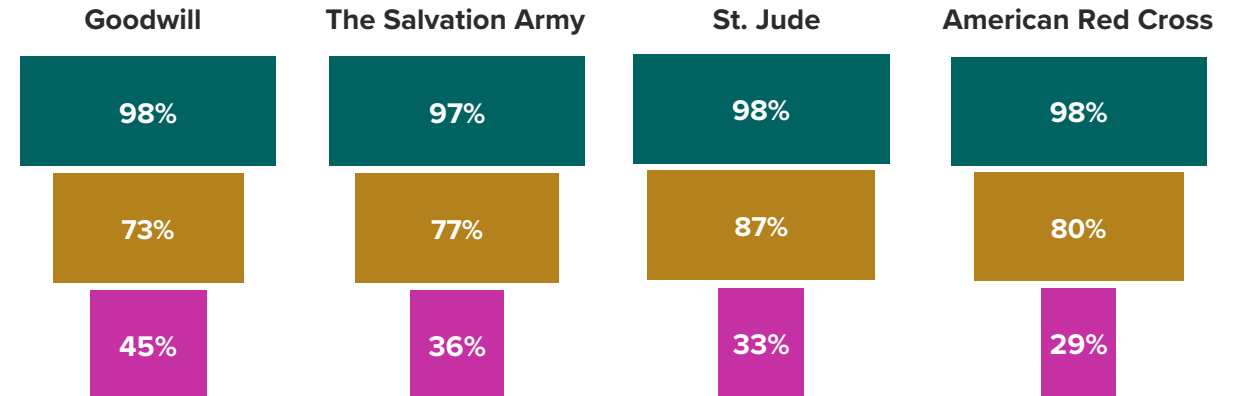
These nonprofits do an incredible job of moving adults from awareness to trust, and from trust to donating. Goodwill touts an incredible 62% funnel ratio between trust and donating. Nonprofit leaders may look at this and grapple with the fact that they’re not in the business of “nonmonetary” donations. It will be important to think outside the box to continue to build awareness, trust and ultimately donations or engagement.

As we enter what may be a tricky economic operating environment, nonprofits will need to learn how to diversify the ways consumers can engage with their organization to build awareness and trust for the long term.

**Top four nonprofits by reported donation past 12 months:**



This is a simplified funnel based on the questions asked about nonprofits in the Most Trusted Brands research. Consumer-facing brands would likely consider other funnel metrics.



Source: Morning Consult Research Intelligence



# About this Report & Methodology

## What is Morning Consult's Most Trusted Brands?

Every day, our flagship platform, Morning Consult Brand Intelligence, asks thousands of consumers, both in the United States and around the world, about thousands of brands: “How much do you trust this brand to do what is right?”

Brand rankings were determined by finding net trust, or the share of respondents who said they trust each brand to do the right thing “a lot” and “some” minus the share who said “not much” and “not at all.”

We rank brands in our Most Trusted Brands project by *net trust* because it tells a more complete story on trust. Just looking at trust doesn't give you the full picture: It removes the sometimes-sizeable share of consumers that *distrust* a brand.

## METHODOLOGY

The data behind Morning Consult's Most Trusted Brands 2023 project was gathered March 3-April 3, 2023. Brand rankings were determined by finding net trust, or the share of respondents who said they trust each brand to do the right thing “a lot” and “some” minus the share who said “not much” and “not at all.”

### Most Trusted Brands: Global

Representative samples of 408 to 8,553 adults were gathered from each country, with unweighted margins of error of up to +/-5 percentage points. Brands tracked through Morning Consult Brand Intelligence with fewer than 10,000 survey responses since being tracked on MCBI were not included in this analysis. See below for U.S. list details.

### Most Trusted Brands: U.S.

Representative samples of 799 to 8,434 U.S. adults were gathered in the United States with an unweighted margin of error of up to +/-3 percentage points. For the United States, brands in the aerospace and defense, chemicals, energy, health, medical devices, military, nonprofit, pharmaceutical and semiconductor sectors were excluded from the analysis; service-based children brands were also excluded. The ranking lists below follow this methodology, with the following caveats.

#### Most Trusted Brands: Banking, Investment and Payments

This list includes banks, investment companies and payments companies (including fintechs), while sub-brands or children brands were not included in the analysis. Insurance companies were not included in the analysis. USAA was included in the analysis, as it is a large bank. *This methodology has been updated to remove tax preparation services from the list of exclusions.*

#### Most Trusted Brands: Retail & E-Commerce

This list includes cross-category physical and online retailers. Sub-brands or children brands, manufacturing brands that sell directly to consumers and retail service providers and delivery partners were not included in the analysis.

*Ranking methodology continues on the next page.*

**Most Trusted Brands: Apparel, Footwear and Accessories**

This list includes both apparel retail and manufacturing brands.

**Most Trusted Brands: Media & Entertainment**

This list includes internet service, consumer electronics, TV, film, radio, social media, sports leagues and betting brands. After the first mention of a brand on the Top 10 list, any sub-brands were skipped for ranking purposes. To minimize overlap with the Most Trusted Tech list, parent brands of big tech companies (Apple, Google, Amazon, Microsoft) were not included in the analysis.

**Most Trusted Brands: Food & Beverage**

After first mention of a brand on the top 10 list, any sub-brands were skipped for ranking purposes.

**Most Trusted Brands: Limited-Service Restaurants**

This list includes both fast food and fast casual restaurants.

**Most Trusted Brands: Beauty**

This data set gathered among 289 to 736 Gen Z adults, with an unweighted margin of error of up to +/-6 percentage points. This list includes beauty and personal care retailers and brands. Hair service and removal brands were not included in the analysis.

**Most Trusted Brands: Universities**

Survey conducted April 3-9, 2023, among a representative sample of 11,010 U.S. adults, with an unweighted margin of error of +/-1 percentage point.

**Most Trusted Brands: Nonprofits**

Survey conducted April 4-8, 2023, among a representative sample of 4,403 U.S. adults, with an unweighted margin of error of +/-1 percentage point.

*All interviews were conducted online and the data was weighted to approximate a target sample of Adults based on age, gender, race, educational attainment, region, gender by age, and race by educational attainment.*

**Most Trusted Brands: Travel & Hospitality**

This list includes airlines, hotels, resorts, vacation rental companies, auto rentals, theme parks, casinos and travel services. After the first mention of a brand on the Top 10 list, any sub-brands were skipped for ranking purposes.

**Most Trusted Brands: Tech**

This list includes internet service, consumer electronics, telecommunications, social media and enterprise software companies. Sub-brands and product lines that are not distinct from their parent brand were not included in the analysis.

**Most Trusted Brands: Social Media**

This list includes major social platforms, though any platform that primarily focuses on messaging (like Messenger or WhatsApp) was not included in the analysis. Dating apps were not classified as social media apps and thus not included in the analysis.

**Most Trusted Brands: Alcohol**

This data set was gathered among 2,404 to 5,207 U.S. adults ages 21 or older, with an unweighted margin of error of up to +/-2 percentage points.

## ABOUT THE AUTHORS



**Joanna Piacenza**  
Head of Industry Analysis



**Jordan Marlatt**  
Lead Tech Analyst



**Claire Tassin**  
Lead Retail &  
E-Commerce Analyst



**Amy He**  
Industry Analyst  
Team Lead



**Charlotte Principato**  
Lead Financial  
Services Analyst



**Emily Moquin**  
Lead Food & Beverage  
Analyst



**Nicki Zink**  
Industry Analyst  
Team Lead



**Lindsey Roeschke**  
Lead Travel & Hospitality  
Analyst



**Kevin Tran**  
Media &  
Entertainment Analyst



**Caroline Bye**  
Business Portfolio  
Leader, VP



**Rahul Choudaha**  
Account Portfolio  
Leader, AVP

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[press@morningconsult.com](mailto:press@morningconsult.com)





# MOST TRUSTED BRANDS 2023

 MORNING CONSULT®