G-HOUSE MEDIA PUBLIC AFFAIRS

IN COLLABORATION WITH THE DEPARTMENT OF BUSINESS ETHICS

TRUST & AUTHORITY REPORT 2026

Trust as a Competitive Factor in Expert Markets

An analysis of the relationships between reputation, media presence, AI visibility and purchasing decisions in expert markets

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The G-House Trust & Authority Report 2026 is a secondary analysis. It is based on the systematic evaluation and synthesis of published primary studies, market reports and industry data. No primary data of our own were collected. The study makes no claim to statistical representativeness for the German expert market as a whole.

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CHAPTER I

Executive Summary

Central findings of the study

On the basis of a systematic evaluation of international primary studies, this study analyses which factors influence trust in experts — and how this trust relates to concrete purchasing and relationship decisions. The analysis arrives at five central findings:

FINDING 1

Trust — not visibility — is the primary influencing factor in the selection of experts.

EDELMAN TRUST BAROMETER 2026 · GFK REPRESENTATIVE STUDY · ANDRES ET AL. 2025

FINDING 2

Third-party confirmation by independent sources generates significantly higher trust than self-declaration.

EDELMAN-LINKEDIN B2B THOUGHT LEADERSHIP IMPACT REPORT 2024/2025 · FORRESTER 2024

FINDING 3

81 % of the German population display an insular trust attitude — they primarily trust the familiar.

EDELMAN TRUST BAROMETER 2026, GERMANY, N=1,200+

FINDING

4

AI-based information systems favour experts who appear in multiple independent sources.

GEO RESEARCH 2025/2026 · GOOGLE E-E-A-T FRAMEWORK

FINDING

5

Expert markets are transitioning from an attention economy to a trust economy.

BDU 2024/2025 · RAUEN 2024 · LÜNENDONK 2025

CONTEXT

These findings concern all actors operating in the expert market: physicians, lawyers, tax advisors, management consultants, coaches, trainers and speakers. External credibility — for example through media visibility, institutional involvement and third-party confirmation — acts here as a factor of market position and not merely as reputation management.

CHAPTER II

Methodology and data basis

Research design

This report is based on a systematic secondary analysis. Only published primary studies, market analyses and research reports were evaluated. No primary data of our own were collected. The approach corresponds to the standard of institutional analyses (cf. Edelman Trust Institute, WEF, OECD, Bertelsmann Stiftung). The selection of sources followed three criteria: (1) methodological transparency, (2) relevance to the German-speaking expert market, (3) currency (survey period 2022–2026).

Primary studies considered

STUDY / SOURCE	SAMPLE / METHODOLOGY	THEMATIC FOCUS
Edelman Trust Barometer 2026 (DE)	n=1,200+, representative, 28-country comparison	Trust in institutions, individuals, companies
Edelman-LinkedIn B2B TL Report 2024/25	n≈3,500 (2024) / 2,000 (2025), 7 countries	Thought leadership and B2B purchasing decisions
RAUEN Coaching Market Analysis 2024	n=1,100 coaches, Germany	Market structure, income, target groups
artop / HU Berlin: Coaching Survey 2025	n=473 coaches, October 2025	Profile, digitalisation, AI use
Andres et al. 2025	n=1,391 consumers, November 2025	Trust hierarchy: human vs. algorithm
GfK / Greven Medien	Representative study Germany	Information sources, purchasing decision

STUDY / SOURCE	SAMPLE / METHODOLOGY	THEMATIC FOCUS
Forrester 2024 Buyers' Journey Survey	B2B decision-makers, international	Self-directed purchase research
GEO research reports 2025/2026	Tryprofound, LLMrefs, Strapi	AI visibility and authority signals

Full source references in the bibliography (Chapter XII).

Scope and limitations

This study makes no claim to statistical representativeness for the German expert market as a whole. It evaluates existing studies and derives conclusions from them. For some professional groups fewer specific primary sources were available; here, general trust-research findings were combined with sector-specific market observations. This is indicated in the text in each case.

CHAPTER III

Theoretical framework

Trust, reputation, authority

Trust: Definition and mechanism of action

In social-science research, trust denotes a person's willingness to behave towards another person or institution in a way that entails vulnerability — in the expectation that the other party will act trustworthily (cf. Luhmann 1968; Mayer et al. 1995). In the context of expert markets it is decisive that trust represents less a rational assessment of proven competence than a heuristic under conditions of information asymmetry. The client of a lawyer, doctor or coach cannot usually assess their competence directly and therefore relies on signals that indicate competence and integrity.

»

Trust is the willingness of a party to be vulnerable to the actions of another party based on the expectation that the other will perform a particular action important to the trustor.«

MAYER, DAVIS & SCHOORMAN (1995) · ACADEMY OF MANAGEMENT REVIEW, 20(3)

— Reputation: The social capital of credibility

Reputation denotes the collective assessment of an actor by relevant reference groups on the basis of past actions and communicated values (Fombrun 1996). In contrast to trust, which arises interactionally, reputation is a societal phenomenon — it exists even without direct contact. In the expert market it functions as pre-trust: it enables a client to trust an expert before any personal experience has been made.

— Authority: A scientific definition

In the present context, authority denotes the socially perceived competence and credibility of a person or organisation that is legitimised through independent confirmation by third parties. Three forms are relevant to the expert market: (1) subject-matter authority — recognised competence in a field of knowledge; (2) institutional authority — legitimation through associations, chambers, universities; (3) media authority — public assessment by independent media.

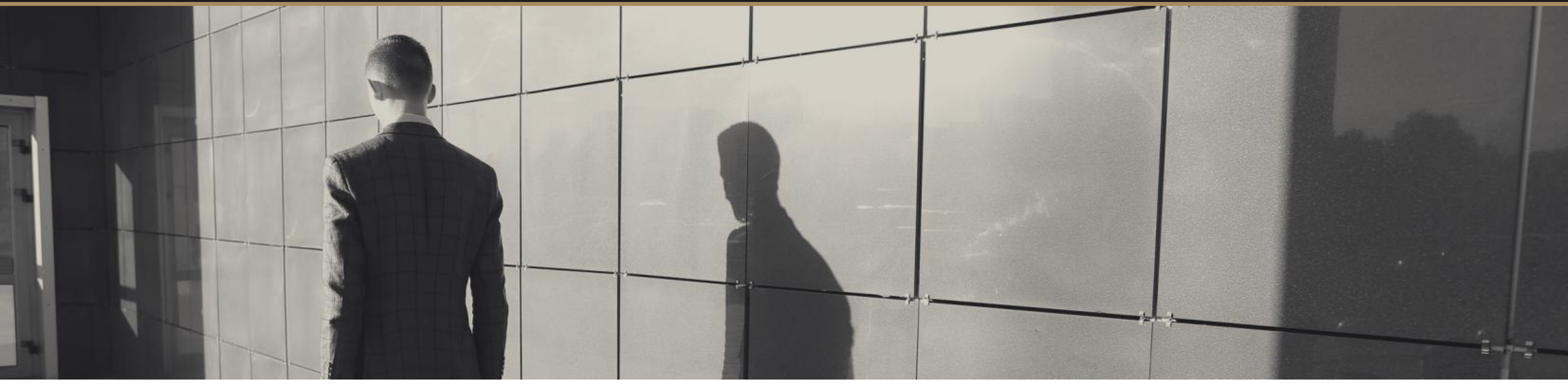
— Information asymmetry and the quality-signalling problem

Akerlof (1970) described the fundamental problem of markets with information asymmetry: when buyers cannot assess the quality of an offering, prices fall and good providers are driven out. In signalling theory (Spence 1973) a distinction is drawn between costly and costless signals: only costly signals — those that cannot be reproduced at will — create credibility. Self-declarations on one's own website are costless and therefore not differentiating. Publications in specialist media, institutional memberships and invitations to renowned stages are costly — and therefore credible.

IV

CHAPTER IV · EMPIRICAL FINDINGS I

The crisis of trust in Germany



Germany in international comparison

The Edelman Trust Barometer 2026 (n=33,938 in 28 countries, survey period October–November 2025) shows a trust index of 44 points for Germany — rank 26 of 28. Germany thus lies deep in the range of institutional distrust. Figure 1 visualises Germany's position in international comparison.

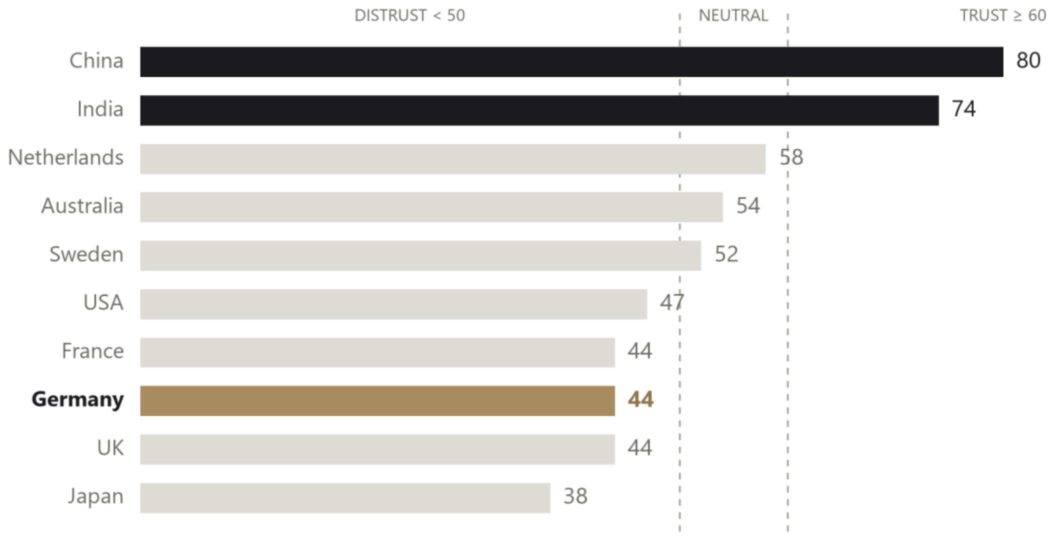


FIGURE 1 Trust Index 2026 — Selected countries in comparison

Source: Edelman Trust Barometer 2026. Own illustration.

44/100

Trust index Germany 2026 — rank 26 of 28 countries surveyed. Average trust in companies, government, media and NGOs.

EDELMAN 2026, DE, N=1,200+

81 %

of the German population display an insular trust attitude. They primarily trust people who are similar to them in values, sources and background.

EDELMAN 2026, GERMANY

8 %

of Germans believe the next generation will be better off. A historic low — rank 3 of 28 countries worldwide.

EDELMAN TRUST BAROMETER 2026

— The concept of insularity

Edelman 2026 describes the retreat into familiarity — so-called insularity — as a central trend. Figure 4 shows the distribution of the insular trust attitude in Germany: 44 % are generally unwilling, 37 % hesitant, only 19 % open towards people and institutions that differ from them.

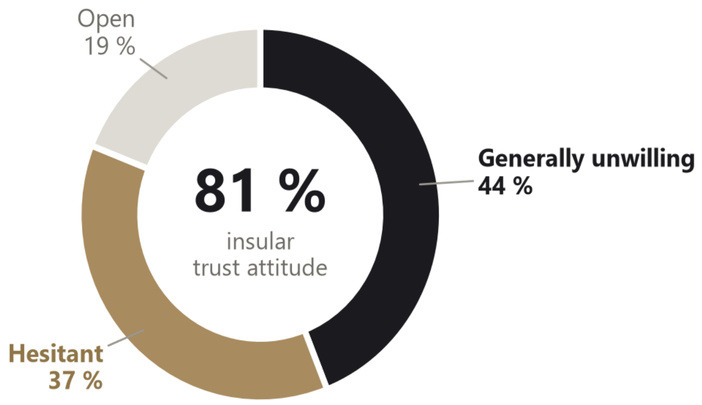


FIGURE 4 Insular trust attitude in Germany 2026

Source: Edelman Trust Barometer 2026, Germany, n=1,200+. Own illustration.

IMPLICATION FOR THE EXPERT MARKET

Anyone who meets a potential client as an expert without being anchored in that client's existing trust network starts with a structural trust deficit — regardless of their professional competence.

»

Trust is shifting from the institutional to the personal. The immediate circle, family, colleagues and direct networks are gaining; supra-regional institutions are losing.«

EDELMAN TRUST BAROMETER 2026, GERMANY

TRUST DEVELOPMENT IN GERMANY 2026	MEASUREMENT / FINDING
Institutional trust (government, media)	Declining — politicians: −16 points trust delta
Immediate circle: family, friends, network	Rising — +11 points trust delta
Own employer / direct superior	+9 points trust delta
Domestic vs. foreign companies	63 % vs. 29 % — 34 points difference
Income-dependent trust gap	58 vs. 30 points — top 7 worldwide

Source: Edelman Trust Barometer 2026, Germany. Statistically significant changes at the 99% confidence level.

Figure 3 shows the trend of the Germany trust index from 2022 to 2026. Germany remains in the distrust range throughout the entire period — a structural, not a cyclical phenomenon.

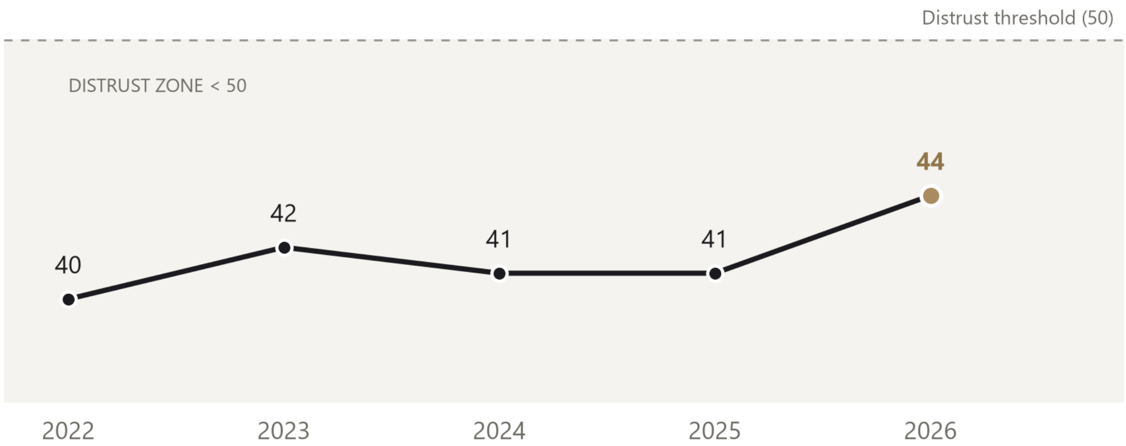


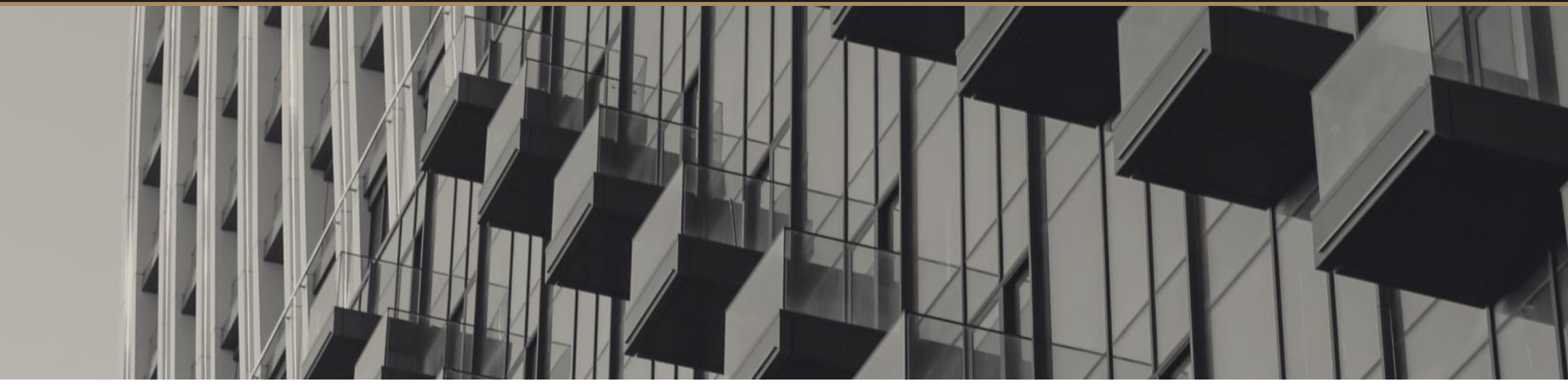
FIGURE 3 Trust Index Germany 2022–2026

Source: Edelman Trust Barometer. Own illustration.

V

CHAPTER V · EMPIRICAL FINDINGS II

The expert market under differentiation pressure



Market structure and growth dynamics

The German-speaking market for expertise has shown stable growth rates for years. The RAUEN Coaching Market Analysis 2024 (n=1,100) and the BDU industry data 2024/2025 provide the empirical basis. Figure 7 summarises the structural data of the coaching market.

~ 9,000	64 %	45 %	5–10 %
active business coaches in Germany	of coaching clients are executives	of sessions took place online in 2024	market growth per year

FIGURE 7 Structural data of the German coaching market 2024

Sources: RAUEN 2024 · artop/HU Berlin 2025 · Lünendonk 2025. Own illustration.

MARKET SEGMENT	STRUCTURAL DATA	GROWTH AND TREND DATA
Coaching market Germany	Avg. gross annual income: €89,249 approx. 9,000 active business coaches	Market growth 5–10 % p.a. 64 % of clients: executives
Management consulting Germany	Market volume: €31.5 bn (BDU 2018) Continuously rising demand	Growth through transformation and digitalisation
Continuing-education market	One of the largest in Europe Strong segment: leadership	Online share: 45 % (RAUEN 2024) In-person remains trust-relevant

Sources: RAUEN Coaching Market Analysis 2024 · BDU 2024/2025 · 12th Lünendonk Study

— The differentiation problem

A growing market with low barriers to entry produces a differentiation problem: when almost all providers make comparable competence claims, these statements lose their informational value. According to economic signalling theory (Spence 1973), only costly signals that cannot be reproduced at will create credibility. Self-declarations on one's own website are not among them, but publications in specialist media, institutional memberships and conference appearances are.

SELF-CLAIM — LOW TRUST TRANSFER	THIRD-PARTY CONFIRMATION — HIGH TRUST TRANSFER
»I guide transformation«	Case study: corporate leadership in 12 countries, published in [specialist medium]
»I work individually and empathetically«	Media quote as an expert in FAZ, Handelsblatt or Der Spiegel
»Years of experience«	Membership in a recognised professional association or economic body
»Innovative approach, lasting results«	Cited in a peer-reviewed publication or recognised report
»I help you unfold your potential«	Recommended by [trustworthy institution or person]

VI

CHAPTER VI · EMPIRICAL FINDINGS III

The limits of digital reach strategies

Empirical findings: Reach and trust

One of the most consistent findings of the studies reviewed is the decoupling of digital reach and trust. Figure 6 illustrates the central mismatch: while 90 % of German companies are active on social media, only 60 % see measurable results. At the same time, 95 % of potential B2B buyers are not actively looking for a provider at the moment of contact — reach alone does not initiate a purchase impulse.

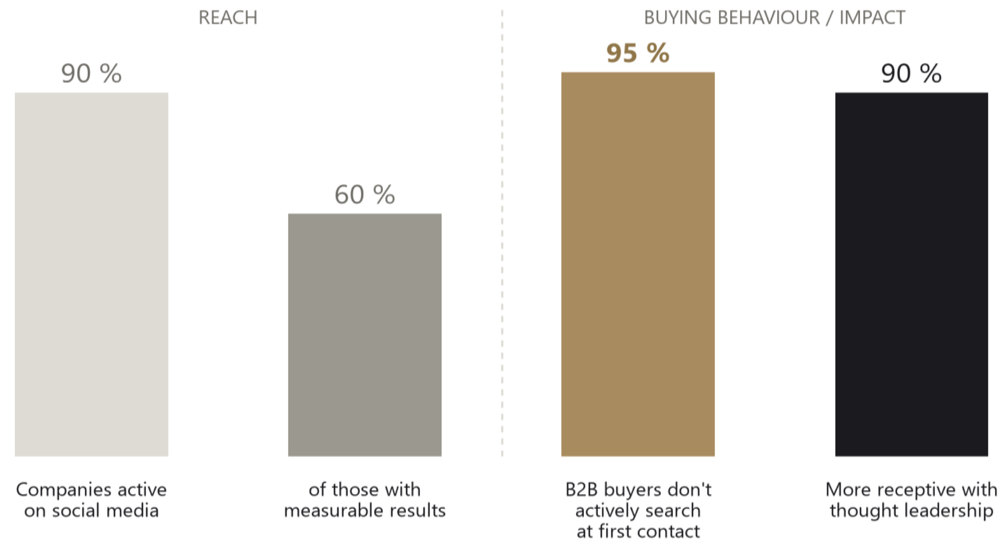


FIGURE 6 Reach vs. impact — The mismatch in digital expert marketing

Sources: DIM/BVDW · Edelman-LinkedIn B2B 2024 · Forrester 2024. Own illustration.

95 %

of potential B2B buyers are not actively looking for a provider at the moment of first contact. Reach alone does not initiate a purchase impulse.

EDELMAN-LINKEDIN B2B THOUGHT LEADERSHIP IMPACT REPORT 2024

— The algorithm as an obstacle to trust

For Germany, Edelman 2026 documents a decline in the willingness to consume information from dissimilar sources (−7 points). Combined with platform-specific algorithmic logic — which reinforces existing preferences — this creates a dynamic that essentially confines organic content to already convinced followers.

WHAT DIGITAL REACH DELIVERS	WHAT DIGITAL REACH DOES NOT DELIVER
Visibility for a broad, undifferentiated audience	Credibility with the relevant target group
Short-term attention (algorithm-dependent)	Sustainable trust-building
Self-produced content (own channels)	Editorial assessment by independent media
Measurable: impressions, clicks, followers	Measurable: referral rate, inbound enquiries
Low barrier to entry — imitable	High investment — not reproducible at will

Synthesis: Edelman Trust Barometer 2026 · UPLOAD Magazin Social Media 2026 · Edelman-LinkedIn B2B 2024/2025

VII

CHAPTER VII · EMPIRICAL FINDINGS IV

Third-party confirmation as a trust-transfer mechanism

— Trust hierarchy: Empirical basis

The findings on the trust hierarchy in purchasing decisions are stable across several studies. Figure 2 identifies personal recommendations from one's network (68 %) as the strongest single factor — far ahead of algorithmic recommendations (37 %) and paid communication (14 %).

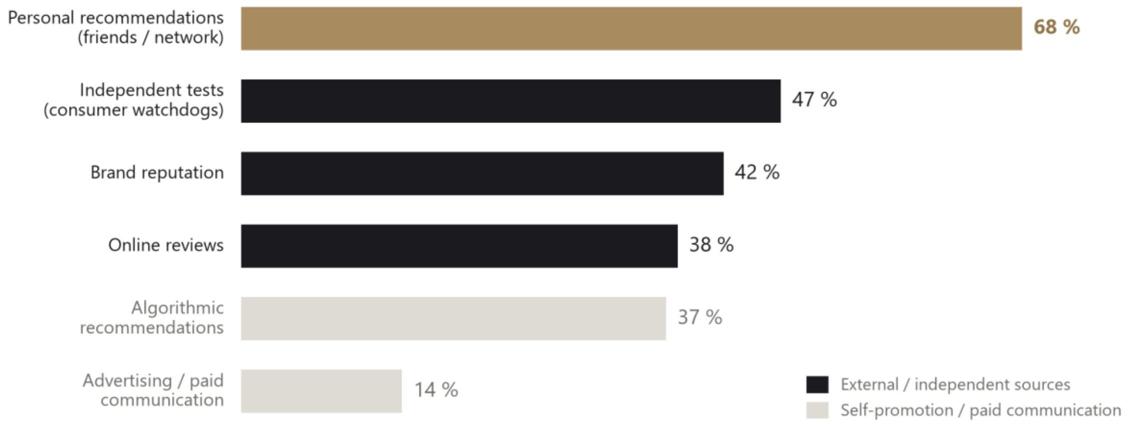


FIGURE 2 Trust hierarchy in purchasing decisions — Germany
Sources: Andres et al. 2025 (n=1,391) · GfK/Greven Medien · Capterra. Own illustration.

— The thought-leadership effect: Empirical basis

Figure 5 summarises the central findings of the Edelman-LinkedIn B2B Thought Leadership Impact Reports 2024/2025. Consistently, the data show that high-quality expertise communication in external formats significantly changes purchasing decisions.

FIGURE 5 The thought-leadership effect on B2B purchasing decisions
Source: Edelman-LinkedIn B2B Thought Leadership Impact Report 2024/2025, n=3,500 / n=2,000. Own illustration.

68 %

trust for personal recommendations from one's network — compared with 37 % for algorithmic and 14 % for paid communication.

ANDRES ET AL. 2025, N=1,391

75 %

of C-suite decision-makers researched a product they had not previously considered — triggered by a single high-quality thought-leadership publication.

EDELMAN-LINKEDIN B2B REPORT 2024

Mechanisms of institutional trust transfer

Trust thus arises not primarily through direct interaction, but through association with already trustworthy actors and institutions. An expert who is quoted by a recognised medium, introduced by an association or presented on a relevant stage benefits from that institution's trust capital — regardless of whether the potential client can assess the service themselves.

VIII

CHAPTER VIII · EMPIRICAL FINDINGS V

AI systems as a new trust infrastructure

From SEO to GEO: A paradigm shift

The growing use of generative AI systems as a source of information is shifting the logic of digital expert positioning. While classic search engine optimisation (SEO) aimed at findability, Generative Engine Optimization (GEO) evaluates sources according to trustworthiness and institutional anchoring.

> 1 bn

daily search queries on ChatGPT alone. AI-assisted information search is common practice today and continues to gain relevance.

TRYPROFOUND / LLMREFS GEO RESEARCH 2025/2026

— The E-E-A-T principle: How AI systems assess authority

To evaluate sources, AI systems use the E-E-A-T framework: Experience, Expertise, Authoritativeness and Trustworthiness. Experts without external confirmation in independent sources are indistinguishable from self-declarations for AI systems — and are therefore not recommended.

E-E-A-T DIMENSION	OPERATIONALISATION IN THE EXPERT CONTEXT
Experience — Lived experience	Published case studies, public appearances, verifiable practical experience
Expertise — Specialist knowledge	Specialist articles, publications, quotes in specialist media, academic contributions
Authoritativeness — Authority	Citations by other authorities, institutional roles, rankings
Trustworthiness — Trustworthiness	Consistency across all online presences, external confirmation, no contradictions

Sources: Google Search Quality Evaluator Guidelines · Strapi GEO Guide 2025 · LLMrefs GEO Research 2026

— The compounding effect of authority

A central finding of GEO research is the compounding effect: experts once established as trustworthy are recommended permanently and across topics — across different queries. Authority signals built early become a lasting competitive advantage.

»

Competitors who implement authority signals build moats that late optimizations struggle to bridge. Once an LLM selects a trusted source, it reinforces that choice across related prompts.«

STRAPI · GENERATIVE ENGINE OPTIMIZATION GUIDE 2025

IX

CHAPTER IX

Sector-specific analysis

Six expert markets in comparison

The general findings on trust formation apply across the board in their basic mechanisms — their sector-specific manifestation varies considerably. In the following, six relevant expert markets are analysed.

01 Coaches and trainers

The coaching market is the expert market with the lowest institutional entry barrier and the highest provider density. With around 9,000 active business coaches and an average income of €89,249 gross (RAUEN 2024) it is attractive, but marked by considerable differentiation problems. According to the Deutschlandtest survey 2025, market leadership arises from the combination of subject-matter competence and externally verified authority.

02 Management consultants

In the consulting market, network referrals are the primary acquisition channel in the premium segment. Cold acquisition without prior trust-building has a systematically low success rate. Relevant trust signals: media presence as a subject-matter expert, association membership, published expert analyses (BDU industry data 2024/2025).

03 Physicians and medical professionals

In the healthcare market the trust barrier is highest. Patients decide on the basis of recommendations, professional reputation and online reviews. 43 % of German consumers read 6–10 reviews before choosing a provider (Capterra). Additionally trust-building: memberships in professional societies, publications, media presence as an expert source.

04 Lawyers and law firms

Legal services require the highest trust of all expert markets. Clients select lawyers primarily on the basis of specialisation reputation and network referrals. In the premium segment, listings in legal directories (JUVE, Legal 500) and media presence on legally relevant topics act as strong differentiation signals.

05 Tax advisors and auditors

New client acquisition takes place almost exclusively through referrals from existing client networks. Professional events, lectures in entrepreneurial circles and publications on tax-law developments are the most relevant trust signals besides chamber membership.

06 Speakers and keynote presenters

Speakers are booked on the basis of authority in a subject area. This manifests through book publications, institutional anchoring, demonstrated expertise at decision-maker level and media references. Social-media content does not replace these signals.

X

CHAPTER X

Conclusions and implications for action

From the synthesis of the empirical findings, ten conclusions can be derived.

01 Trust is the primary competitive factor

In expert markets with high information asymmetry, trust is the decisive factor in purchasing and referral decisions — consistently demonstrated across all studies reviewed.

02 Self-declarations have little credibility effect

In a crowded market in which all providers make comparable competence claims, these have hardly any differentiating effect (Spence 1973). Only costly signals that cannot be reproduced at will create credibility.

03 Third-party confirmation is the most effective form of trust transfer

The empirically strongest form of trust-building is third-party confirmation by independent, already trustworthy actors: media, associations, recognised institutions, network referrals.

04 Insular trust structure favours network anchoring

The insular trust attitude of 81 % of the German population means: new clients trust what their existing network already knows. Trust-building begins in the relevant network, not in the open digital space.

05 AI reinforces existing authority structures

Generative AI systems reproduce and reinforce existing authority patterns. Experts without external confirmation are hardly recommended by AI systems — regardless of their professional quality.

06 Reach and trust are decoupled

Digital reach and trust do not necessarily correlate. In an insular trust climate, high self-promotion without an institutional anchor can inhibit trust.

07 Expert markets are transitioning to a trust economy

The empirical evidence points to a structural shift: from the attention economy, in which visibility was decisive, to the trust economy, in which verifiable authority decides the competition.

08 The authority gap is measurable

The authority gap — the gap between professional competence and publicly attributed authority — can be operationalised: media citation frequency, institutional memberships, referral rate, AI visibility.

09 Long-term reputation-building is more sustainable than short-term campaigns

Trust arises slowly and cumulatively. The relevant unit of time for trust-building is not the campaign cycle but the build-up of lasting institutional presence over years.

10 External credibility is a factor of market position

Media visibility, institutional affiliation and external confirmation act on market position in a trust economy and are to be distinguished analytically from mere reputation management.

XI

CHAPTER XI

Conclusion

The trust economy as a market structure

On the basis of international primary studies and market analyses, this study has analysed the relationships between reputation, media presence, institutional anchoring and purchasing decisions in expert markets. The findings are consistent and permit a clear conclusion:

CENTRAL FINDING

»It is not professional competence but the publicly perceptible and externally confirmed authority of an expert that is the primary driver of trust — and thus of purchasing decisions — in markets with high information asymmetry.«

G-HOUSE TRUST & AUTHORITY REPORT 2026

This finding does not mean that professional quality is irrelevant — it is the necessary precondition. But in a crowded market in which professional quality cannot be assessed from the outside, it is the quality of the trust signals that decides.

In future it will not be the most visible provider that prevails, but the most credible — less the one with the greatest reach or the loudest self-promotion than the one with institutional anchoring and robust third-party recommendations.

This finding is not meant normatively; it describes the market structure as it emerges from the available data. Expert markets are on the way to a trust economy.

CHAPTER XII

XII

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