# The critical role of reviews in Internet trust
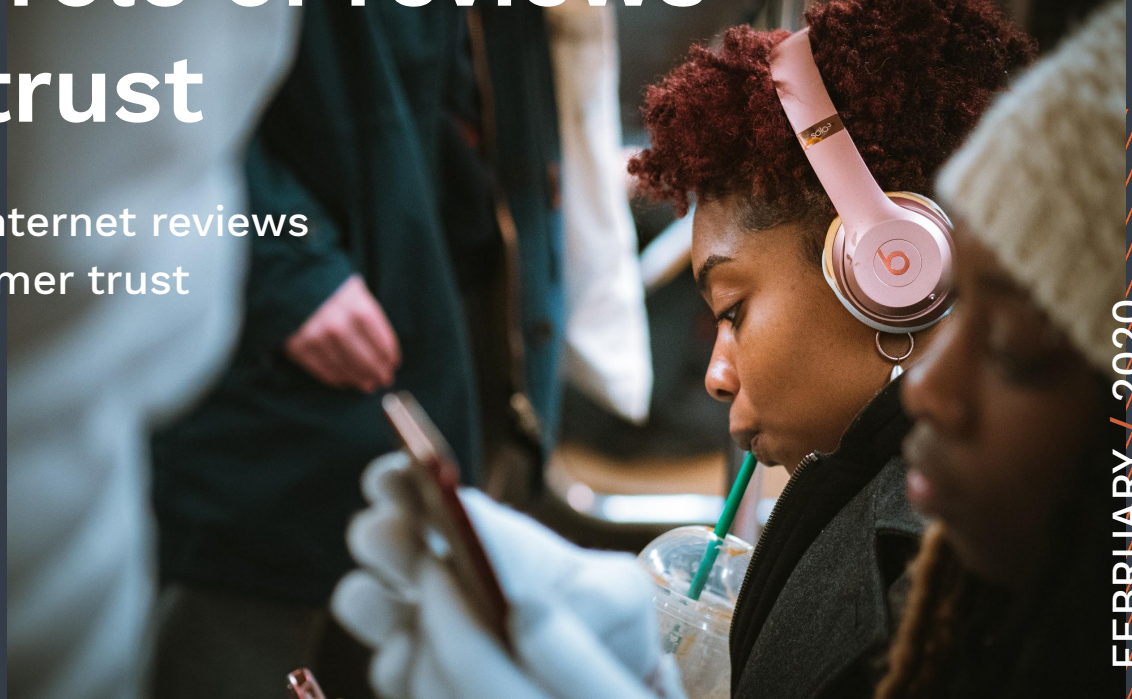
/ How different types of Internet reviews create and damage consumer trust

FEBRUARY / 2020

**CANVAS8**

# Introduction

**/** The critical role of reviews in Internet trust

As trust in society is eroding and people come to put their faith in the anonymous reviews of strangers, attitudes towards trust are impacting people's decisions and behaviour.

In order to better understand Internet consumer trust, Trustpilot commissioned independent behavioural insights practice Canvas8 to explore what consumers value online and how reviews impact their behaviour. The following report illustrates the insights that emerged.

# About Canvas8

We are a behavioral insight practice based in London and New York helping organisations to understand people.

Our core team of Behavioral Analysts – with backgrounds ranging from anthropology to psychology, journalism to strategy – is complemented by a global network of over 1,400 influential thinkers and cultural observers.

Our approach blends human science, market research and strategic consultancy – and is a product of our unique company structure.

We've helped the Bill & Melinda Gates Foundation leverage the science of influence; informed major activations for Nike and helped the British government stimulate global trade.

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# Approach

**/** How the research was conducted

## Methodology

**Desk research and media analysis:** Review of existing research on relevant behavioural and cultural trends, learnings and insights around trust and reviews. This was supplemented with an analysis of emerging media narratives around Internet trust and reviews, using Quid, a media index and analysis tool

**Quantitative survey:** A nationally representative online survey of 2152 people across the UK, 2056 in France and 2175 in the US

**Expert interviews:** Interviews with leading experts in marketing and social sciences, to uncover richer insights behind why consumers do what they do on the Internet and why transparent reviews matter

## The experts



**Professor Jonah Berger**
Associate Professor of Marketing, Wharton School at the University of Pennsylvania and author of *Invisible Influence: The Hidden Forces that Shape Behavior*



**Professor Karen Cook**
Director of the Institute of Research for Social Sciences, Stanford University and co-editor of the *Annual Review of Sociology* and editor of a number of books in the Russell Sage Foundation Trust Series.

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# Navigating the Internet trust landscape

# Key findings / Trust in brands is eroding, but consumers know how to fix it

**11%**

decline in trust from ages 18 to 65 for consumers globally*

Brands need to rebuild trust with consumers

**89%**

of consumers globally check reviews online before making purchases*

Consumers have already found confidence in the voices of their peers

**62%**

of consumers globally would stop using platforms that they knew they were censoring reviews*

As a company or brand, you can't fake it

**64%**

of consumers globally would prefer to buy from a responsive company over one that appears perfect*

Consumers want companies to join the conversation and empower discussion

**55%**

of consumers globally would prefer to use an open platform*

and they want to be able to share their experiences without fear of being silenced

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# Contents

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# 01

# The Erosion of Trust

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*Trust is historically low all across society. Governments, media and educational institutions have all been experiencing a slide in public confidence.*

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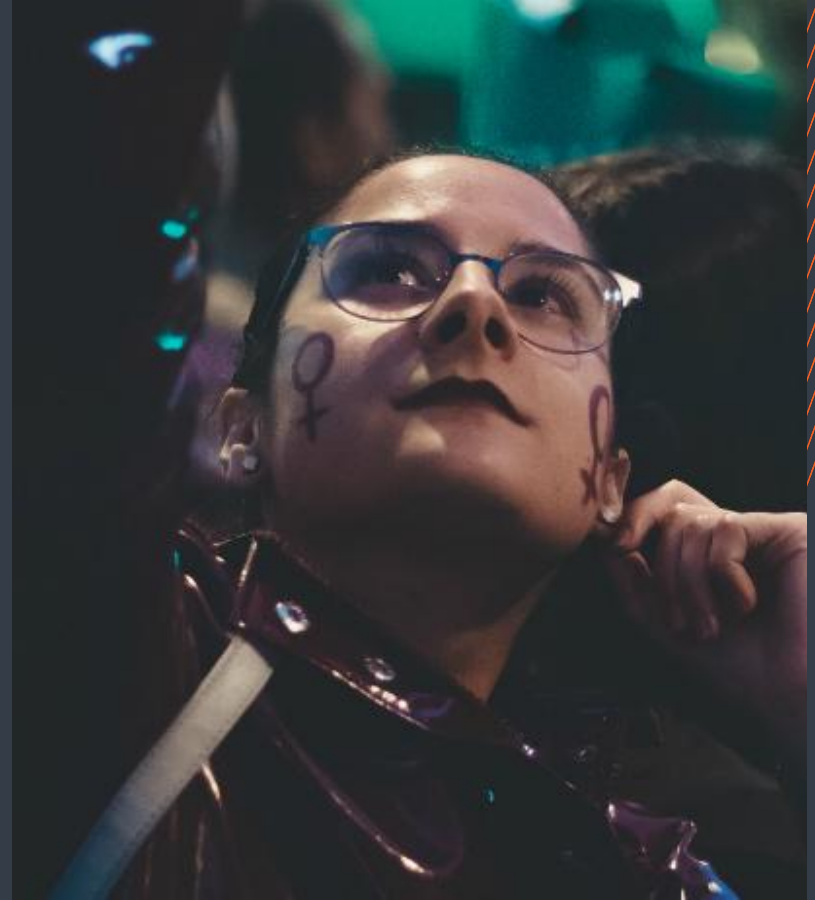
# Trust in many segments of society is at an all-time low

The political climate of recent years has been characterised by increased erosion of trust in the government, media, and a wide range of public and private institutions. The discourse around fake news has been central to our understanding of political developments in the US and the UK in particular, with Russia's interference in the US 2016 elections and pro-Brexit campaigns often cited as vivid examples of the problem that post-truth politics poses in modern society.



" *We've seen a regular rate of decline of trust in government, religious, even medical institutions to a degree*

**Professor Karen Cook**
Director of the Institute of Research for Social Sciences , Stanford University

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"

*People are more and more aware now that the mainstream news has an agenda, it isn't unbiased*

**Professor Jonah Berger**
Associate Professor of Marketing, Wharton School at the University of Pennsylvania

At the same time, political parties rank

# 7th

... out of the seven entities tested in this study and are the least trusted by consumers
The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

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# As people lose faith in the mainstream news media, political parties, and even the church, they're increasingly turning to their peers to get information and recommendations



**"** *Trust is definitely eroding and society is becoming more polarised, this is a trend we can see is being led by the US*

**Professor Karen Cook**
Director of the Institute of Research for Social Sciences , Stanford University

Consumer review websites rank…

## 2nd

… as most trusted by consumers in the UK and US to provide honest opinion about a good or service. Only 'family and friends' rank higher.
The critical role of reviews in Internet trust, 2020

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# The online sphere is particularly scrutinised

Social media platforms, such as Facebook and Twitter, have come under considerable scrutiny for the role they play in the spread of misinformation. Along with other open platforms, they have become the major battleground for arguments for and against censorship. Discussions around the open, uncensored nature of these platforms are ongoing.

However, according to a 2018 Pew study, better Internet identity-verification systems, tighter security standards in internet protocols, new laws and regulations, new techno-social systems like crowdsourcing, up-voting/down-voting (or challenging) online content, and blockchain will all inspire more confidence in online trust in the coming decade.

The Fate of Online Trust in The Next Decade, 2018
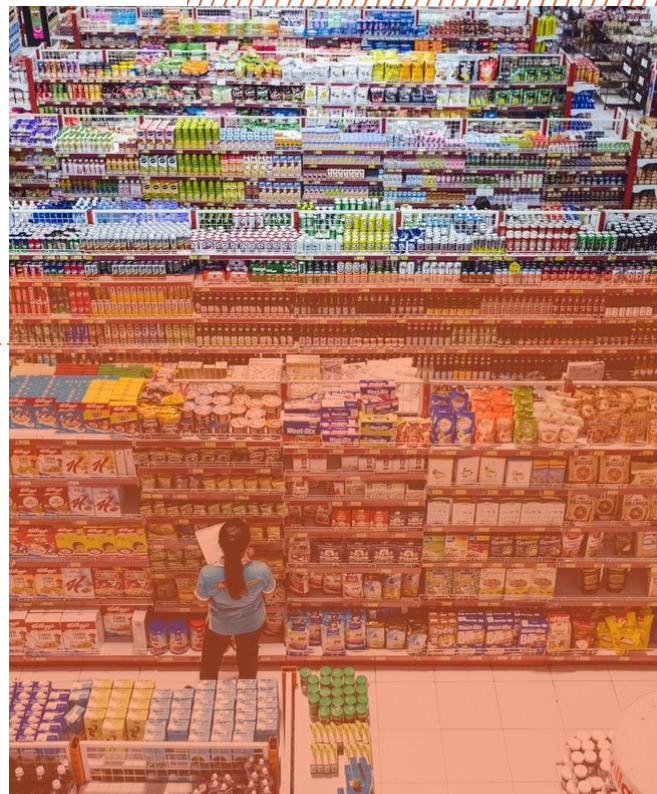
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# Brands are in danger of suffering similar declines experienced by the other areas of society



## only 71%

of people trust consumer brands
The critical role of reviews in Internet trust, 2020
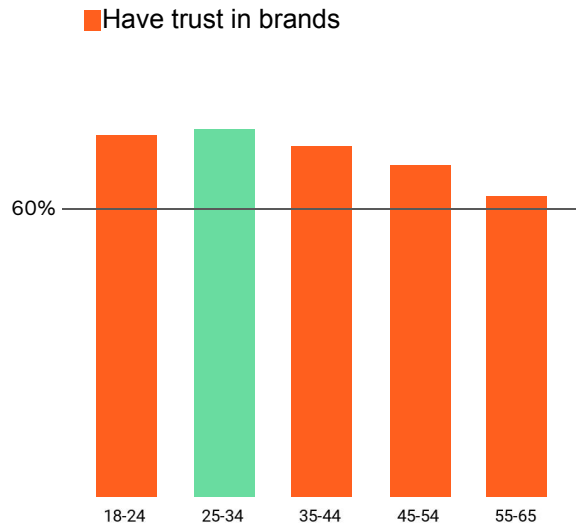Average of results, France, UK and US

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# Older consumers are more skeptical...

## 11% decline

in trust from ages 18 to 65 for consumers globally
The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

■ Have trust in brands



Looking at the global average, trust in brands peaks with consumers aged 25-34 and then declines.

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# ...and brand trust is at risk among younger consumers

When asked about how their trust in brands has changed over the past 12 months, the most stable group overall was 25-34 year olds. While erosion in brand trust roughly correlated with age, **18-24's also indicated a decline in trust**, especially in France and the UK.

## 1 in 5

(21%) consumers aged 18-24 say they trust brands less than they did 12 months ago

The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US



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# 02

# The Importance of Review Platforms

*As trust declines, people increasingly put faith in peer-generated content*

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# Review sites are a natural step in consumers' shopping journeys

An overwhelming majority (89%) of consumers report checking reviews before making purchases

The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

And with **45% indicating they use them more now than they have in the past**, this is only likely to increase with the continued growth of e-commerce into the next decade.

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**"**

*[As] more people are shopping on the internet, and for more things – the need for reviews only increases... There's a lot of new brands and we're seeing smaller players coming in and disrupting industries, and so **consumers need to turn to others online to get information***

**Professor Jonah Berger**
Associate Professor of Marketing, Wharton School at the University of Pennsylvania
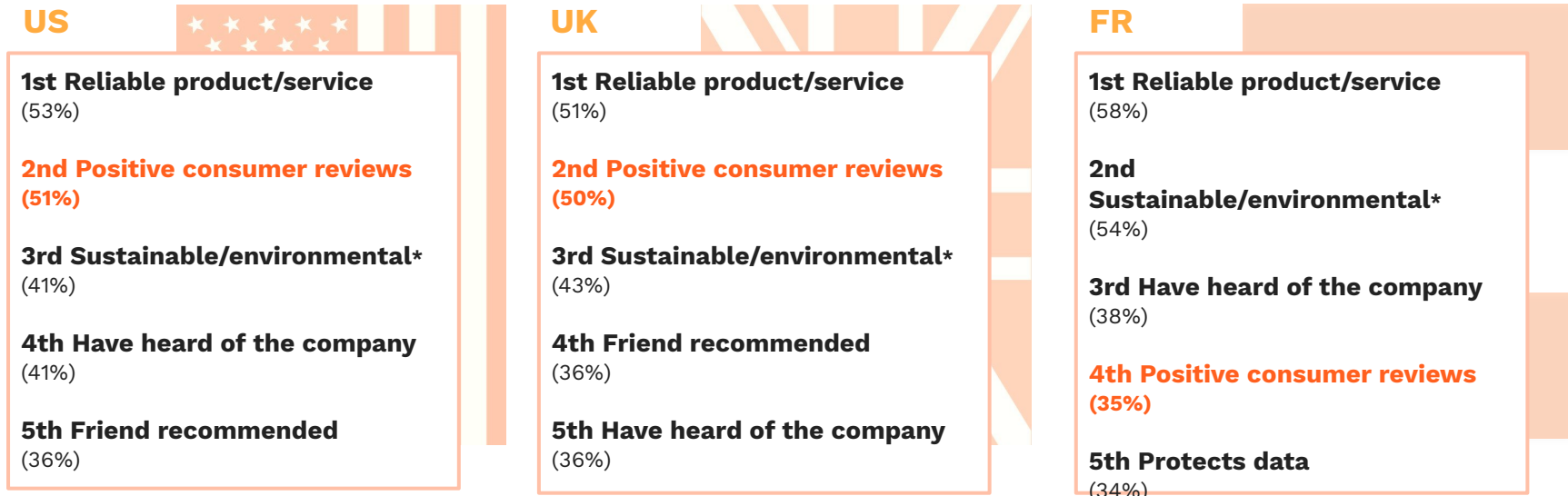
# 49%

of consumers selected positive consumer reviews in their top 3 purchase influences
The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

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# Top purchase drivers

Top factors compelling consumers to purchase from a company ranked by the rate of incidence of inclusion in consumers' top three:

## US

1st Reliable product/service
(53%)

**2nd Positive consumer reviews (51%)**

3rd Sustainable/environmental*
(41%)

4th Have heard of the company
(41%)

5th Friend recommended
(36%)

## UK

1st Reliable product/service
(51%)

**2nd Positive consumer reviews (50%)**

3rd Sustainable/environmental*
(43%)

4th Friend recommended
(36%)

5th Have heard of the company
(36%)

## FR

1st Reliable product/service
(58%)

2nd Sustainable/environmental*
(54%)

3rd Have heard of the company
(38%)

**4th Positive consumer reviews (35%)**

5th Protects data
(34%)

Please rank the top three most important factors influencing your buying decisions. "I'm more likely to buy from a company...
*Full response: sustainable and acts in the interests of the environment/wider society

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# Consumer review websites are more trusted than traditional institutions

Although they've been around for less than two decades, **consumer reviews platforms are trusted** sources, **second only to friends and family in the US and UK** where they score higher than schools, religious institutions, mainstream media and social media influencers.

## 3rd

trust ranking of review sites, **ranked above religious institutions and political parties globally**
The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

**"**

*People are getting more cautious about information..[in the US in particular,] regulatory bodies and others aren't viewed as trustworthy, as people question their motives depending on who's in charge of them now. It makes sense that consumer review sites [are more trusted than] expert reviews because there are a lot of them and people look for consensus.*

**Professor Karen Cook**
Director of the Institute of Research for Social Sciences , Stanford University

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# Consumer review websites rank 3rd for trust on average across all three markets

Ranked groups by top ranking of trust:

## US

1. Family and friends
2. Consumer review websites
3. Schools and educations systems
4. Mainstream news (CNN, USA Today, New York Times, etc)
5. Religious institutions
6. Social media influencers
7. Political parties

## UK

1. Family and friends
2. Consumer review websites
3. Schools and educations systems
4. Mainstream news (Guardian, Daily Mail, etc)
5. Religious institutions
6. Social media influencers
7. Political parties

## FR

1. Family and friends
2. Schools and educations systems
3. Mainstream news (Le Figaro, etc)
4. Consumer review websites
5. Social media influencers
6. Religious institutions
7. Political parties

Please rank these groups in order of which you feel you can trust the most. Rankings start with the top at "most trustworthy"

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# Consumers see their peers as independent and honest

When asked specifically which sources they would trust to provide them with an **honest and independent** information, consumer review websites were **ranked third out of a possible 11** options.

Friends and family claimed the top spot in all three markets, reflecting **high levels of trust within peer networks**.

And consumer review sites are a conduit to a **wider network of peers**.

# 3rd

rank of consumer review sites as the sources
most likely to provide an honest review
The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US



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# Not all review platforms inspire the same levels of trust

Despite review platforms embedded in eCommerce websites experiencing some of the highest rates of traffic in this space, they are not the most trusted.

Reviews on social media sites – while being relatively high in usage, also ranked poorly for trust (7th place in both the US and UK).

Former go-tos for brands looking to engage with consumers, social media influencers and celebrities, are also viewed with skepticism.

## 96%

of global consumers do not trust social media influencers

Universal McCann, 2019

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# While social media usage increases, trust in it decreases

**25%**

of UK consumers are using social media **more** than they did two years ago

**63%**

of UK consumers trust social media **less** than they did two years ago

Yougov, 2019

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# Standalone consumer review platforms are popular for people looking for impartial and more diverse peer networks

**"** *Things that are unbiased are seen as not having an agenda, even schools and media channels, whether liberal or conservative media, they have an agenda. Social media too. Facebook, CNET, Amazon or eBay could be seen as having an agenda...When you see standalone consumer reviews, they're not perceived to have an actor or entity behind them.*

**Professor Jonah Berger**
Associate Professor of Marketing, Wharton School at the University of Pennsylvania



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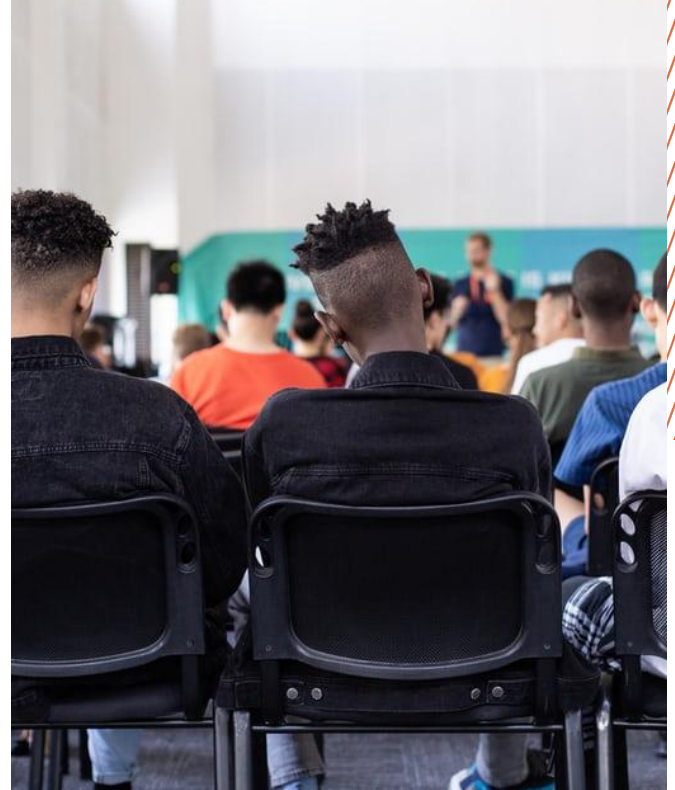
# 03

# What Consumers Want
# From Reviews

*Consumers are strongly against censorship and are invested in finding the truth, and expect review platforms to align with these values*



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# Truth and transparency are valued above ease of use

The majority of consumers prefer to use an open platform – by which we mean users don't have to be invited by the brand to participate. On an open platform, anyone is free to write a review as long as they comply with the guidelines set out by the platform.

In short, open platforms enable greater freedom of speech and do not allow companies to censor reviews.

"" *People prefer something that's open... to consumers the notion of companies being able to remove [unflattering] reviews can sound nefarious*

**Professor Jonah Berger**
Associate Professor of Marketing, Wharton School at the University of Pennsylvania



## 56%

of consumers in the UK, think it's very important to know exactly how review websites choose to publish reviews
The critical role of reviews in Internet trust, 2020

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# Consumers won't tolerate fakes

Fake reviews were cited most commonly amongst the most undesired behaviours on the internet (requiring zero-tolerance policies) with **more than three in five** people believing they should be removed.

Politically biased advertising and insults were in fact seen as less problematic than fake reviews; such high ranking may have to do with economic investments at stake, as people want to be protected from wasting their money on fraudulently reviewed products and experiences.

## 62%

of consumers globally, hold a zero-tolerance attitude towards fake reviews

The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

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# Consumers believe too many dishonest brands are guilty of manipulating reviews to improve their image

**Dishonest brands have been known to manipulate consumers with celebrity endorsements or riding the wave of social causes.  Half of consumers (49%) believe that "too many companies" are 'creating fake reviews online'.**

This is perceived to be a bigger problem among dishonest brands than false claims in advertising (45%).

The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

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# The more diverse reviews the better

Consumers indicate that a mixture of positive and negative reviews are more authentic – and that an imperfect but good score was a better prompt to purchase than consistently positive reviews.

**❝** *More and more people are getting suspicious of 5 star ratings*

**Professor Karen Cook**
Director of the Institute of Research for Social Sciences , Stanford University

## 53%

of consumers globally selected a realistic mix of positive and negative reviews as the top prompt to purchase
The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

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*The more reviews and input, the more I can gauge whether the product is worth buying. It all boils down to variety with reviews*

**US Respondent**
The critical role of reviews in Internet trust, 2020

# 55%

of consumers would prefer to buy a product with a large number of reviews and an average rating over a product with a small number and excellent rating

The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

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# Consumers have more trust in imperfect scores

Perfect scores are seen as too good to be true, as consumers seek information that is diverse and varied. Over half of consumers have more faith in imperfect scores, who believe that a less than perfect review proves authenticity – this was highest in the US and UK (55% and 52% respectively)

**❝** *If the company had only 5 star reviews I am more likely to believe they have had people put up false reviews and delete bad reviews.*

**US Respondent**
The critical role of reviews in Internet trust, 2020



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# 'Detective' consumers will dig deeper into 5 star reviews to sort the truth from fiction

Many consumers no longer accept reviews at face-value - although some will see a 5 star review and instinctively think the product or service is a must-buy, the majority will consider the proposition, but approach with caution and still do a bit of digging around.

**"** *It's all about the quality of information – and can you trust it?*

**Professor Karen Cook**
Director of the Institute of Research for Social Sciences , Stanford University

**56%**
Will consider a 5-star rated product or service, but do more research before committing

**21%**
See a 5-star review and believe it's a "must buy"

**16%**
See a 5-star review and suspect that it's a fake

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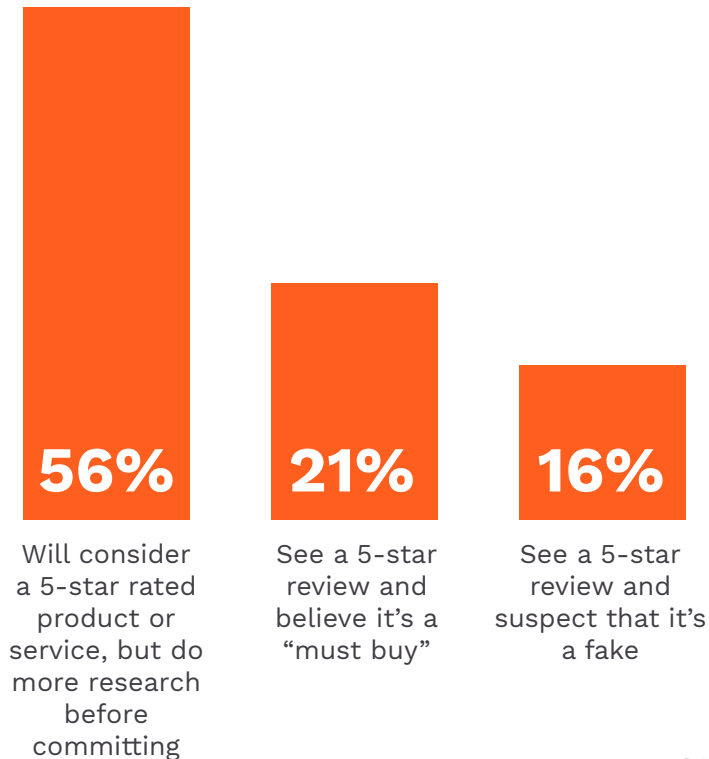
# The more reviews the better

According to Edelman's 2019 Trust Barometer, 81% of consumers say that trusting a brand to do what is right is a deciding factor in purchase decisions.

While consumers worry that fake reviews will lead them to waste their money, **open platforms with diverse reviews encourage people to trust and buy from brands.**

## 49%

of consumers worry that fake reviews will lead them to waste money on poor products and services

The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

**"** *A larger amount of people reviewing it would imply it's popular.*

UK Respondent
The critical role of reviews in Internet trust, 2020

**"** *The more reviews there are, the less chance that they've been faked.*

France Respondent
The critical role of reviews in Internet trust, 2020

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# Consumers are waking up to the reality of negative reviews

**Seven in 10 people believe censorship of negative reviews to be a serious concern.** In the US, people are more acutely aware of such practices and consider them highly problematic, whilst in the UK almost a third of consumers weren't aware of review censorship but were very concerned by the notion.

# 70% ( **23%** previously not aware and not concerned + **47%** aware and concerned )

of consumers globally believe that censorship of reviews is a serious concern

The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

Not concerned
30.0%

aware and concerned
47.0%

Previously not aware
and concerned

23.0%

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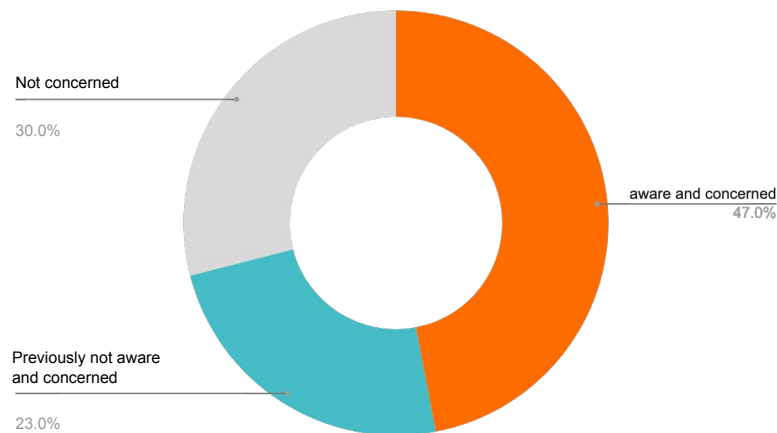
# And consumers will bypass a brand they think manipulates reviews

**Consumers see review manipulation as a breach of trust.** and will take their vistorship or business elsewhere - suggesting that review manipulation is a very risky practice for companies to engage in, with potentially damaging consequences.
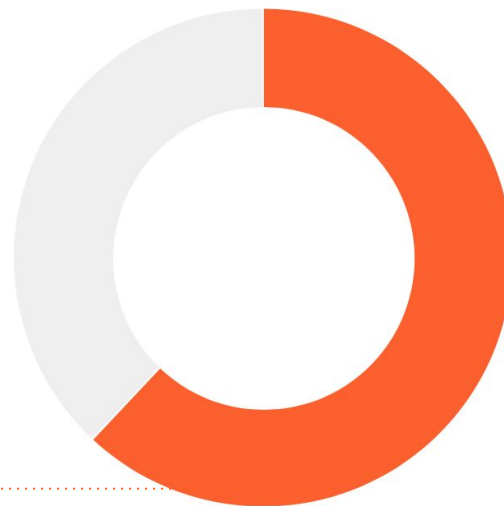
## 62%

of consumers globally would stop using platforms that they knew they were censoring reviews

The critical role of reviews in Internet trust, 2020

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# Consumers also want their peers to be able to share their experiences with brands without fear of being silenced or edited

Consumers prefer to use **open** platforms over **closed** platforms.

**"** *I think there's a free speech element involved, people generally believe they should be able to say what they want [without fear of being silenced]*

**Professor Jonah Berger**
Associate Professor of Marketing, Wharton School at the University of Pennsylvania



| 55% | 22% closed | 22% undecided |

of consumers globally, would prefer to use an open platform
The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

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# People want to see a lot of reviews – not just a few

Consumers place more trust in a large number of reviews with a middling score, than a high score from just a handful of reviews. Globally, over half of consumers would opt for more reviews.



**"** *If I have a hundred people saying I like this TV show, that's great – **it's a lot of social proof** – [more reviews provide] more corroborating evidence*

**Professor Jonah Berger**
Associate Professor of Marketing, Wharton School at the University of Pennsylvania

# 55%

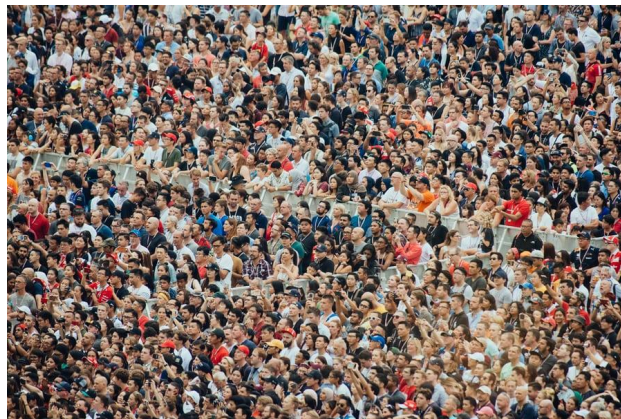Percent of consumers globally, would put more trust in a large number of average reviews than a small number of perfect ones
The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

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# People want real responses to criticism in reviews

Responsive companies are preferred to those that appear perfect. **Consumers are three times more likely to buy from a company that seems to have made a mistake and responded quickly**, compared to a company that appears to be absolutely perfect.

> " *[When companies respond to critical reviews,] it's an indicator that the companies are taking the reviews seriously and that they care about the quality of their products and services.*

**Professor Karen Cook**
Director of the Institute of Research for Social Sciences , Stanford University

## 64%

of consumers globally would prefer to buy from a responsive company over one that appears perfect
The critical role of reviews in Internet trust, 2020
Average of results, France, UK and US

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# Consumers want to have relationships with brands like they do with everyone else in their lives

Consumers need to feel that brands are having an open dialogue - this creates trust.

**66** *It's important when brands respond to consumer concerns [in a way that indicates] "we're not just an entity, we're people like you."*

**Professor Karen Cook**
Director of the Institute of Research for Social Sciences , Stanford University

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**04**

**The DNA of Trusted Reviews**

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# From the Research We've Identified The Three R's Essential For Reviews

## / Realness

There's no magical formula for realness, but consumers consider the amount of reviews, and the ratings – too much perfection can be seen as fake to many.

## / Recency

Consumers are acutely aware that in the world of commerce, you're only as good as your last sale. Many feel that companies can change over time – for the better or worse - and put extra weight on the most recent consumer feedback.

## / Relationships

Consumers want to feel a human connection from brands and most are more than willing to accept that mistakes happen. Brands that are seen to step in and make things right inspire more confidence than those that appear "too perfect".



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**"**
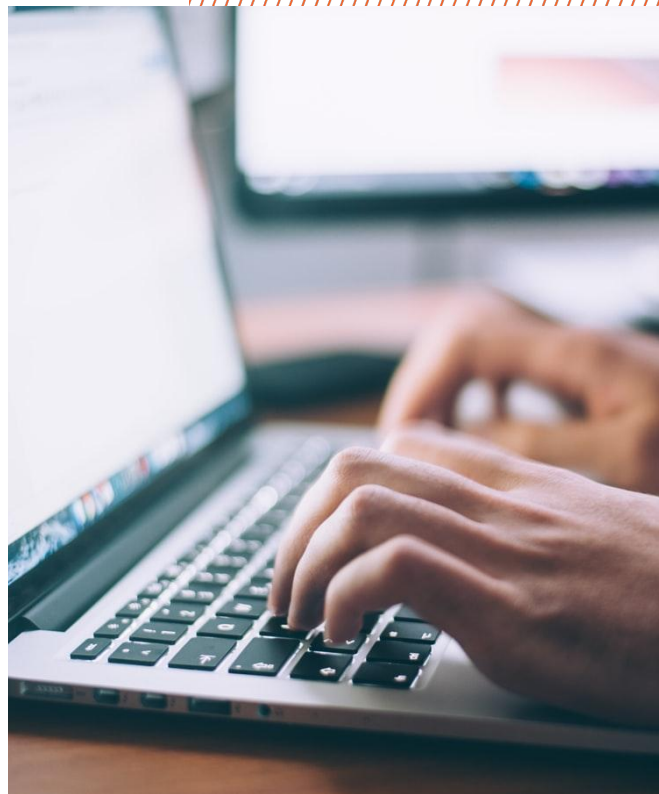
*It's not too different to how people deal with friends – if you've had a friend that made a mistake but they fixed it, then the relationship becomes deeper than if it had never been tested*

**Professor Jonah Berger**
Associate Professor of Marketing, Wharton School at the University of Pennsylvania



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# Trust cues could become codified

## / Review sites can help consumers sort content

While consumers do seek out group consensus and variety in reviews, they sometimes struggle to distinguish the real content from fakes. As open platforms rise in popularity, there's an opportunity to help people find reliable reviews.

## / Reliable reviewers are trusted advisors

Helping consumers identify the reviews they are most interested in will help bolster trust in the space, as it amplifies the voices of real people and their real experiences with products and services. Consistently open, honest reviews engender trust as much in the people leaving them as they do in the brands themselves.

**❝** *Imagine we have an open platform, but some people have a little badge beside their name – so anyone can write a review, but I can decide for myself which ones I believe*

**Professor Jonah Berger**
Associate Professor of Marketing, Wharton School at the University of Pennsylvania

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# Open reviews will build a lasting trust

## / Authentic consumer reviews will grow with ecommerce

As ecommerce continues to wear away at brick and mortar in almost every category, the use of consumer review platforms will also grow as people reach out to their peers to get honest opinions before spending money.

While **open review sites represent the authentic views of their peers**, closed platforms are at risk as **consumers don't trust brands to moderate honestly**. Word of mouth marketing has been a pillar of sales strategies since the dawn of capitalism, and open reviews are the next frontier.
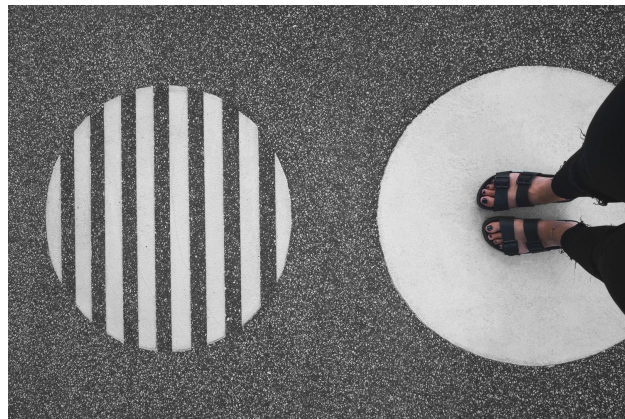


**❝** *I'm going to look in that review for clues of who the person writing it is – if they sound like me I'm going to find that review more diagnostic – I'm going to try to do some detective work*

**Professor Jonah Berger**
Associate Professor of Marketing, Wharton School at the University of Pennsylvania

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**Consumers are looking for reviews they can count on to make the right decisions**

## Trustworthy

64% in the USA
62% in the UK

The critical role of reviews in Internet trust, 2020

## Helpful

43% in the USA
38% in the UK

The critical role of reviews in Internet trust, 2020

## Honest

36% in the USA
35% in the UK

The critical role of reviews in Internet trust, 2020

**/ In France**

**Digne de confiance - 48%**

**Honnête - 41%**

**Transparent - 32%**

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Market Report

# UNITED STATES OF AMERICA

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# / Consumer review websites are ranked 2nd for trust in the US

## Ranked groups by top ranking of trust:

1. Family and friends
2. Consumer review websites
3. Schools and educations systems
4. Mainstream news (CNN, USA Today, New York Times, etc)
5. Religious institutions
6. Social media influencers
7. Political parties

Q: Please rank these groups in order of which you feel you can trust the most. Rankings start with the top at most trustworthy

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# / Consumer review websites are ranked 3rd for the perception of providing honest reviews

## Ranked entities by top ranking of trust:

1. Family and friends
2. Regulatory bodies eg: BBB (Better Business Bureau)
3. Consumer review sites
4. Expert Reviews (CNET, Consumer Reports)
5. E-commerce websites with reviews (Amazon, eBay)
6. Media reviews (CNET, ReviewFreaks, Good Housekeeping)
7. Social media sites with reviews (Facebook reviews, etc)
8. Social media influencers/reviewers
9. Celebrities' owned social channels
10. Paid-for advertising on TV / in newspapers
11. Paid-for advertising on social media

Q: Please rank these groups in order of which you feel you can trust the most. Rankings start with the top at most trustworthy

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# / Positive consumer reviews rank within the top 3 most compelling reasons to purchase

**Top 3 factors compelling purchase from a company by inclusion in top 3 rankings:**

1. Reliable product or service (53%)
2. Positive consumer reviews (51%)
3. Sustainable and acts in the interest of the environment/wider society (41%)
4. Where I've heard of the company (41%)
5. My friend has recommended (36%)

Q: Please rank these groups in order of which you feel you can trust the most. Rankings start with the top at most trustworthy

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# / 75% of US consumers have high or very high trust in consumer brands
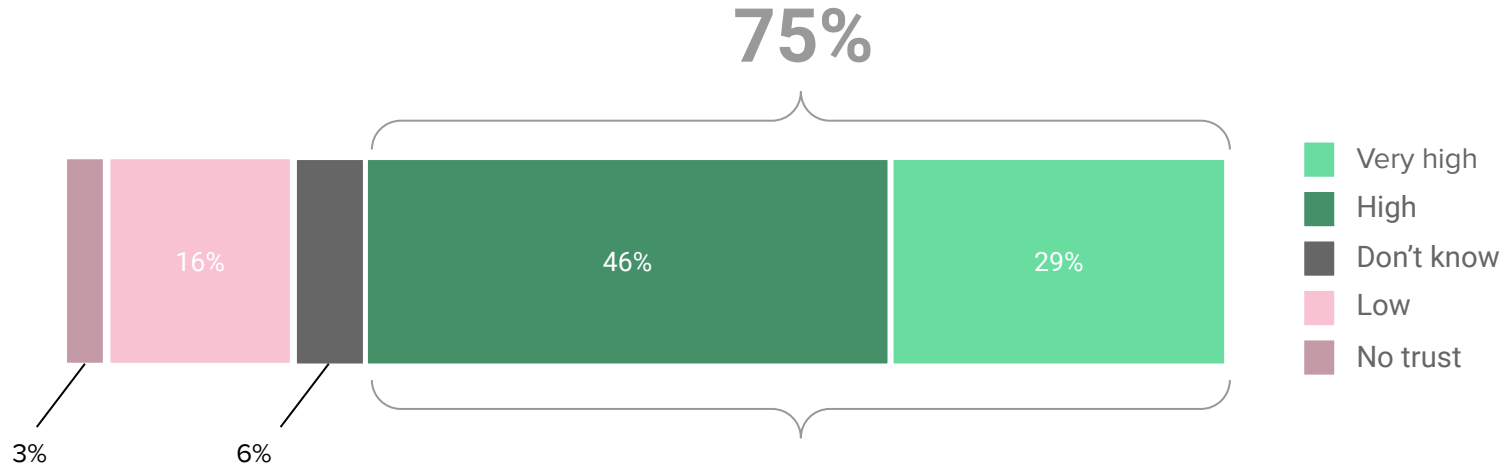
75%

| 16% | | 46% | 29% |

- Very high
- High
- Don't know
- Low
- No trust

3%

6%

Q: How would you rank your trust in consumer brands? (eg: Pret a Manger, Coke, Primark, Apple)

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# / The youngest and the oldest are less likely to trust brands than those aged 25-34
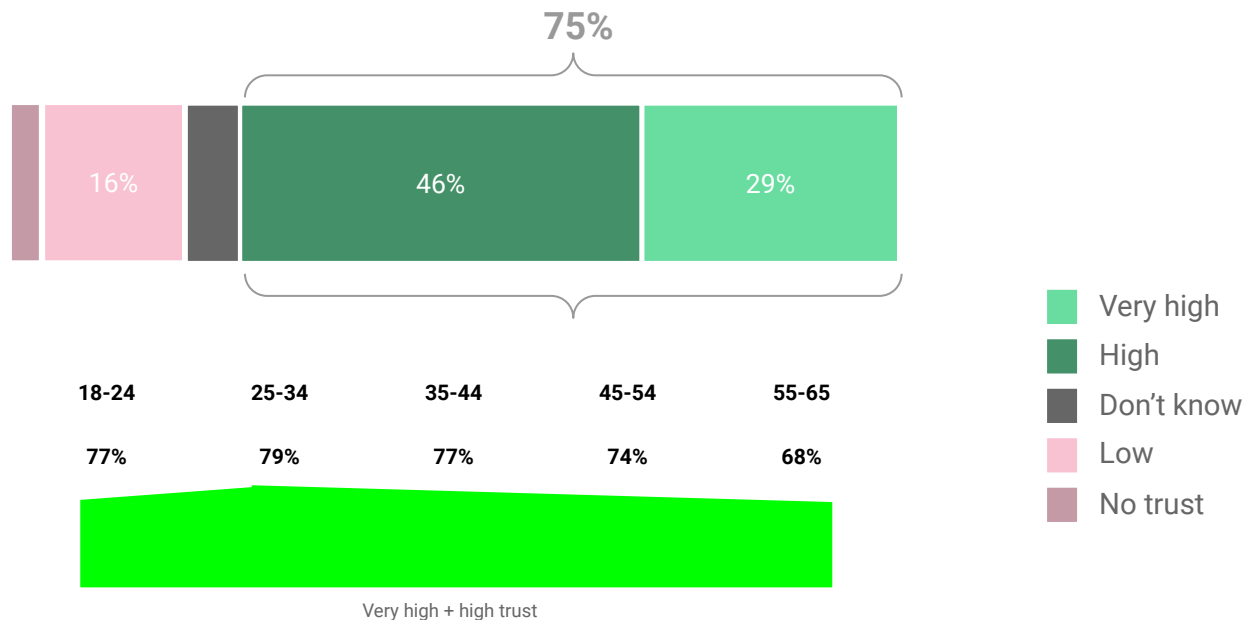
**75%**

**16%**          **46%**          **29%**

- Very high
- High
- Don't know
- Low
- No trust

| 18-24 | 25-34 | 35-44 | 45-54 | 55-65 |
|-------|-------|-------|-------|-------|
| 77% | 79% | 77% | 74% | 68% |

Very high + high trust

Q: How would you rank your trust in consumer brands? (eg: Pret a Manger, Coke, Primark, Apple)

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# / Consumers in the youngest and oldest groups report their trust in brands to be decreasing across time

| US total | 18-24 | 25-34 | 35-44 | 45-54 | 55-65 |
|:---:|:---:|:---:|:---:|:---:|:---:|
| +5% | -3% | +15% | +14% | +4% | -11% |
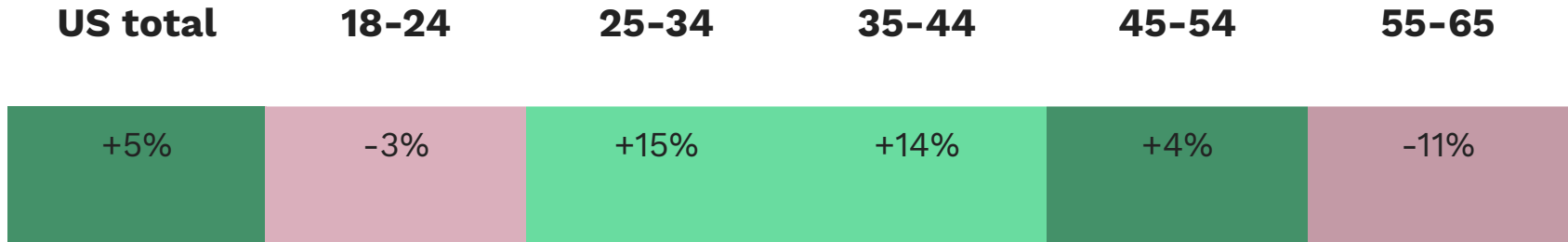
*net difference between incidence of those who report an increase and those who report a decrease

Q: Has your trust in consumer companies changed over the last 12 months?

CANVAS8

# / Consumers believe that brands who manipulate their image are faking and deleting reviews

## Manipulations perpetrated by companies selling products or services:

1. Using societal issues as a marketing ploy (51%)
2. Buying celebrity endorsements (51%)
3. Creating fake reviews online (49%)
4. Making false claims in their advertising (45%)
5. Deleting negative reviews online (43%)

Q: Too many companies are manipulating their image by... Please tick all that apply

CANVAS8

# / 62% of consumers in the US hold a zero tolerance attitude towards fake reviews
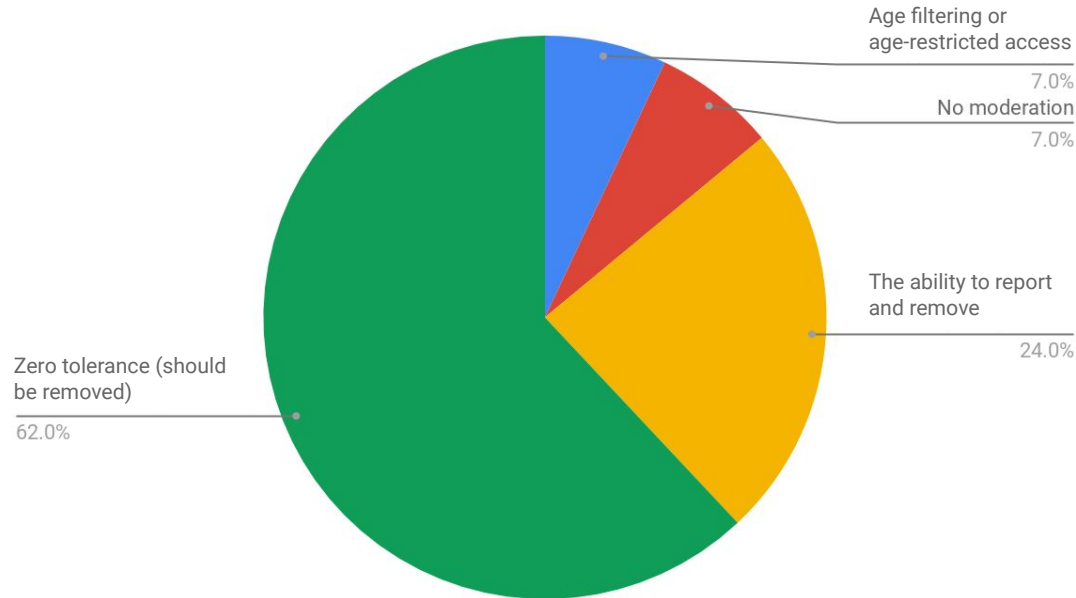


Age filtering or age-restricted access
7.0%

No moderation
7.0%

The ability to report and remove
24.0%

Zero tolerance (should be removed)
62.0%

Q: Too many companies are manipulating their image by... Please tick all that apply

CANVAS8

# / Tolerance towards fake reviews decreases with age

30% of 18- to 24-year-olds feel that fake reviews should be dealt with via a reporting mechanism

| | 18-24 | 25-34 | 35-44 | 45-54 | 55-65 |
|---|---|---|---|---|---|
| 🟨 | 30% | 27% | 23% | 22% | 21% |
| 🟩 | 57% | 56% | 60% | 67% | 69% |

Age filtering or age-
7.0%
No moderation
7.0%

The ability to report and
24.0%

Zero tolerance (should be
62.0%
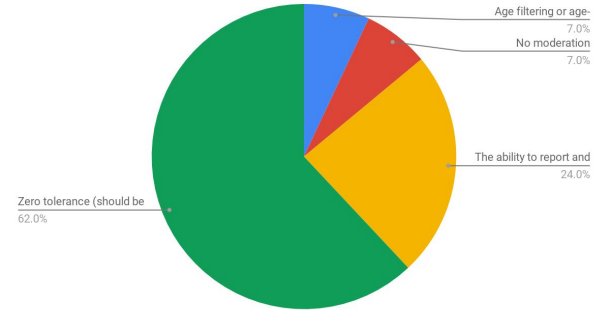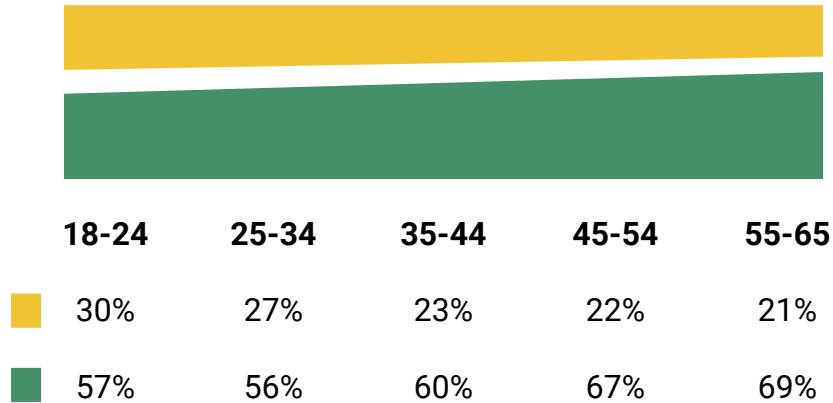
🟨 The ability to report and remove

🟩 Zero tolerance - should be removed

🟥 No moderation

🟦 Age filtering or age-restricted access

Q: For each of the following please describe how you feel they should be moderated (or dealt with) on social media platforms

CANVAS8

# / Almost half of US consumers are relying more on reviews now than they were in the past 2 years

| | |
|---|---|
| 24 months ago | 8% |
| 12 months ago | 17% |
| 6 months ago | 23% |

**48%**

| | |
|---|---|
| I don't rely on consumer reviews | 13% |
| I rely on reviews as much as I did 24 months ago | 39% |
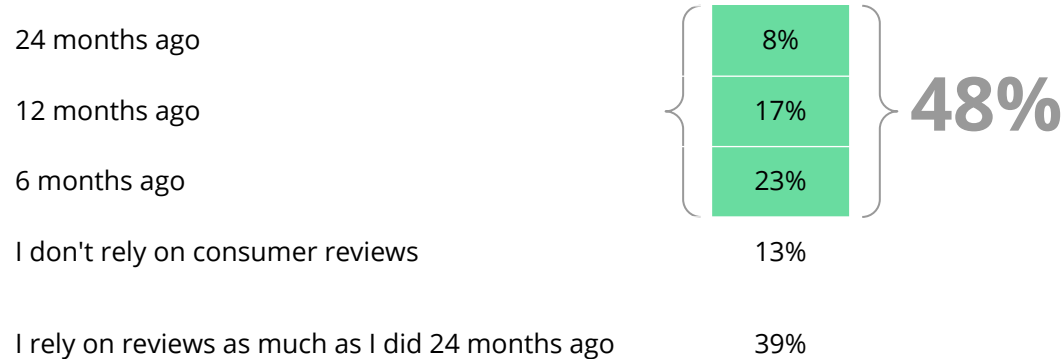
Q: Do you rely more on consumer reviews now than you did...

CANVAS8

# / Just over half of consumers believe that anyone with an opinion should be able to write a review

**The 54% section** of the pie chart includes both those who believe 'anyone with an opinion' and 'anyone except those that work with the company or have a partnership with it'

40% also believe that only those who have transacted with the business should be allowed to write a review

**Only 3%** believe an invite from the brand should be mandatory

Only people who have been invited to write a review by the company after purchasing a product/service

3.0%

No-one, it's too biased

3.0%

Anyone who has an opinion on it + those who feel like anyone who has an opinion but excluding those who work for the company

54.0%

Only people who have purchased from or used the business

40.0%

Q: Who do you think should be allowed to write a review for a company, product or service?  Please select one answer

61

CANVAS8

# / 61% of US consumers think it's very important to know exactly how review websites choose to publish reviews

61%

| 2% | 6% | 31% | 40% | 21% |

Strongly agree
Agree
Neutral
Disagree
Strongly disagree

Q: It's very important to me to know exactly how review websites choose which reviews are allowed to be posted and which arena

CANVAS8
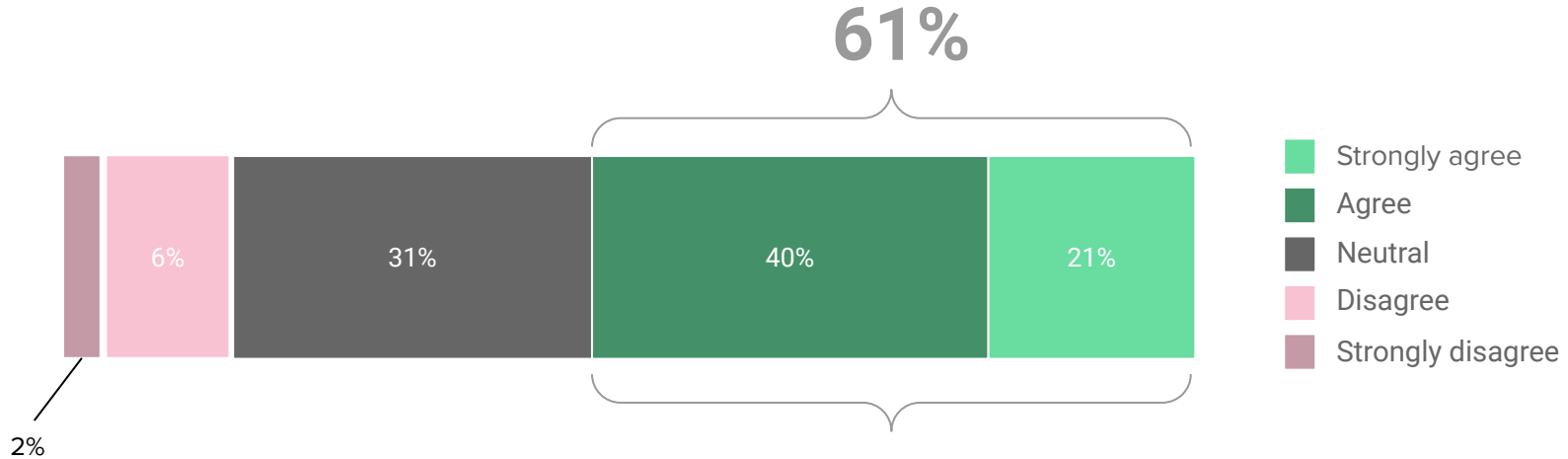
# / A large number of reviews with an average rating is a better signal of trust than a high score with fewer reviews

**I would prefer to buy a product or service with a large number of reviews and an average rating overall**       **58%**

This opinion is stronger amongst males (63%) and those with higher incomes (65%)

I would prefer to buy a product or service with a small number of reviews and a high rating overall       28%

Q: In each of the following scenarios, please pick the option that best describes your opinion

CANVAS8

# 66 Voice of the consumer

Quotes from respondents reveal consumers place confidence in the consensus reached by a large number of reviewers

*"Because a lot of people liked the product, so it has to be good."*

*"I'm more comfortable with products that have numerous reviews regardless of when they were posted."*

*"Because I love more reviews that give me more insight on the product."*

*"The more reviews and input, the more I can gauge whether the product is worth buying. It all boils down to variety with reviews."*

*"The more opinions the better the odds of being the truth"*

Q: In each of the following scenarios, please pick the option that best describes your opinion

CANVAS8

# / Over half of consumers believe that a less than perfect review score is more authentic

**Agreement with the statement "A less than perfect review proves authenticity":**
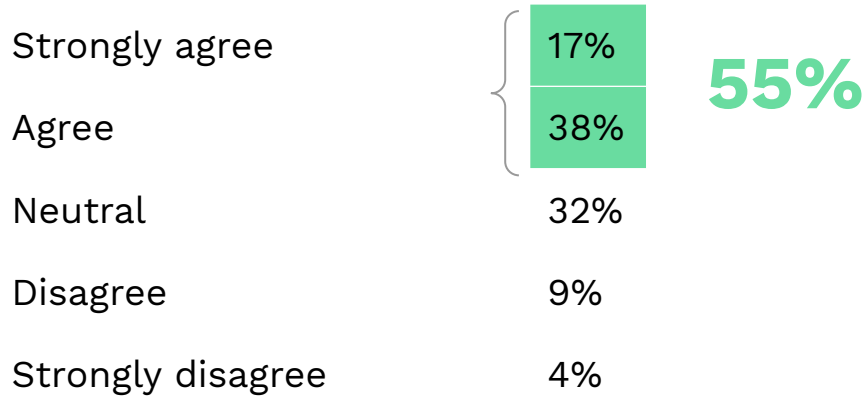
| | |
|---|---|
| Strongly agree | 17% |
| Agree | 38% |
| Neutral | 32% |
| Disagree | 9% |
| Strongly disagree | 4% |

**55%**

Q: In each of the following scenarios, please pick the option that best describes your opinion

CANVAS8

# 66 **Voice of the consumer**

Quotes from respondents reveal they want both negative and positive reviews in order to make informed decisions

*"The consumer should be able to consider ALL reviews."*

*"I want to be able to read all negative reviews. I usually sort by negative reviews first, just to see what I may or may not be dealing with first."*

*"Because I would rather have honest peoples opinions even if they didn't like the product!"*

*"A company having the ability to remove or edit ratings, especially bad ones, does not produce an accurate review"*

*"even if some reviews are fake I would rather see negative ones instead of companies removing them"*

Q: In each of the following scenarios, please pick the option that best describes your opinion

CANVAS8

# / Responsive companies are preferred over those that appear "perfect"

**I would prefer to buy from a company that seems to have made a small mistake and responded quickly**          **67%**

.......................................................................................................

I would prefer to buy from a company that seems to have never made a mistake          22%

Q: In each of the following scenarios, please pick the option that best describes your opinion

CANVAS8

# 66 Voice of the consumer

**Quotes from respondents reveal consumers view responsiveness as an indicator of trust**

*"I would have faith knowing if something was to go wrong they would make sure they made it right for me"*

*"Because everyone makes mistakes and as long as they apologize and fix it I respect that way more than a company trying to act like they are perfect"*

*"It's important for companies to own up to their mistakes and would make me trust them more in the future"*

*"Mistakes are unavoidable sometimes. I admire that a company recognizes their mistake and happily fixes it."*

*"I do like companies that own up to their own errors and fix it quickly/fairly."*

Q: In each of the following scenarios, please pick the option that best describes your opinion

CANVAS8

# / 81% of US consumers have a positive view towards companies that respond to reviews
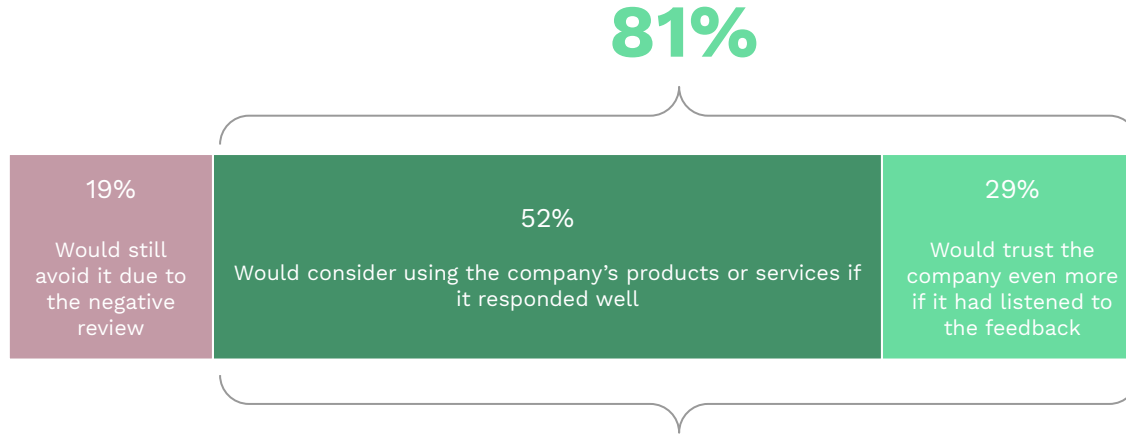
**81%**

| 19% | 52% | 29% |
|---|---|---|
| Would still avoid it due to the negative review | Would consider using the company's products or services if it responded well | Would trust the company even more if it had listened to the feedback |

Q: In each of the following scenarios, please pick the option that best describes your opinion

CANVAS8

# / Well over a quarter of consumers trust a company with a 4 star score over a 5 star score

**I would trust a company more that has a 5 star review**          **51%**

I would trust a company more that has a 4 star review          28%

Q: In each of the following scenarios, please pick the option that best describes your opinion

CANVAS8

## 66 Voice of the consumer

**Quotes from respondents reveal they are suspicious of perfect scores as they suspect review tampering**

*"I am not sure of a company that has straight 5 star reviews because they may be fake reviews by the manufacturer."*

*"If the company had a 5 star review I am more likely to believe they have had people put up false reviews and deleting bad reviews.  No company is perfect."*

*"A solid 5 star review makes me think they have a lot of fake paid reviews"*

*"4 stars shows that almost all of the people were pleased. But some were not. You can't please everyone. Perfect ratings aren't real."*

*"A 5 star review could be based upon a lot of company sponsored or otherwise fake reviews."*

Q: In each of the following scenarios, please pick the option that best describes your opinion

CANVAS8

# / Recency is more important than the total number of reviews a company has

**I would trust a company more that has fewer reviews overall, but has more recent reviews**      **65%**

I would trust a company more that has many reviews but hasn't had any posted in a few months      16%

Q: In each of the following scenarios, please pick the option that best describes your opinion

CANVAS8

# 66 Voice of the consumer

**Quotes from respondents reveal they believe that the quality of products and services change over time**

*"The company might have changed for the better or worse and we need an up to date review on the brand as a whole"*

*"I do like to see what has happened in the last couple months. A whole lot can change from reviews left years ago."*

*"If there hasn't been any recent reviews, that will make me think that the quality of products/services has declined."*

*"I want to know how that company stands in today's market, not from old reviews."*

*"Businesses can change overnight. What may have been true 2 years ago may not apply today"*

Q: In each of the following scenarios, please pick the option that best describes your opinion

CANVAS8

# / 56% of consumers aren't immediately won over by a five star review, opting to do more research

I don't know
3.0%

None of these
3.0%

This is fake
15.0%

I'll consider the product or service but do more research
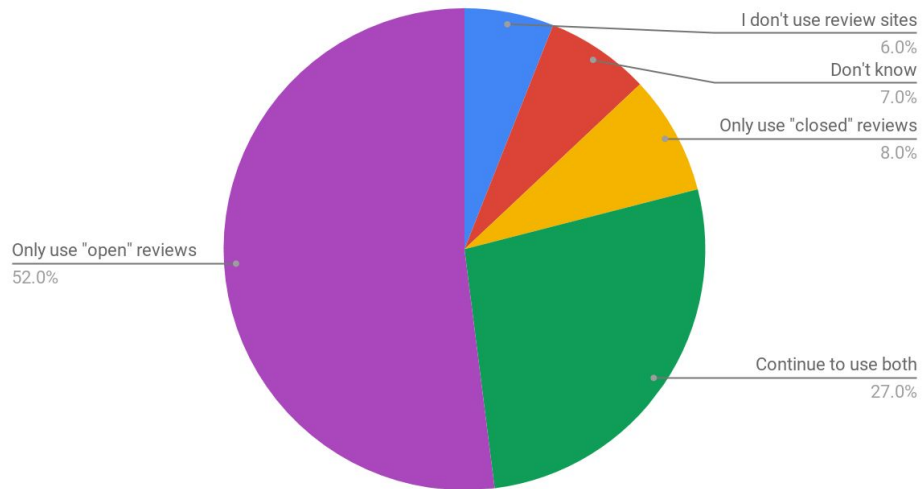56.0%

This is a must-buy
23.0%
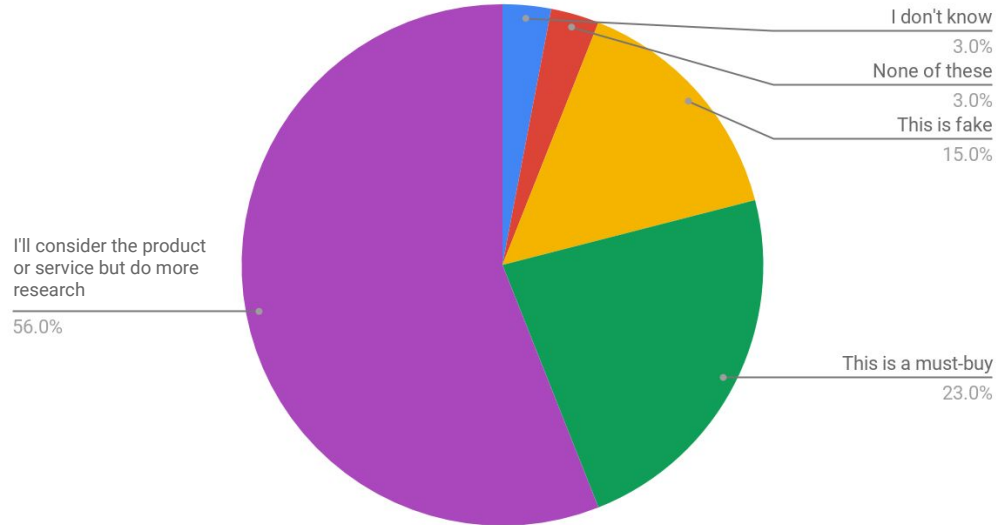
Q: When you see a product or service with a 5* review and 100% comments are positive, do you think:

CANVAS8

# / Whether they were aware or not of review censoring, 72% are concerned about it now

| | |
|---|---|
| I am aware this happens and it's very concerning | 50% |
| I am aware this happens but it doesn't worry me | 17% |
| I don't know or care | 6% |
| I wasn't aware this happened until now, and I'm very concerned | 22% |
| I wasn't aware this happened until now, but it doesn't worry me | 5% |

27% of consumers are not aware that brands are able to censor or remove negative reviews on certain platforms

Q: How concerned are you that on some reviews sites companies can censor and remove consumer reviews?

CANVAS8

# / Half of consumers would opt to only use "open" sites if they discovered censorship on another platform

I don't use review sites
6.0%

Don't know
7.0%

Only use "closed" reviews
8.0%

Only use "open" reviews
52.0%

Continue to use both
27.0%

Q: If you had the knowledge of which reviews sites allowed companies to censor their reviews and which ones didn't - would you ?

CANVAS8

# / Consumers report that they check reviews 90% of the time when buying online

**US total**

90%
Of consumers check reviews before making a purchase

**Female**　**Male**

89%　92%
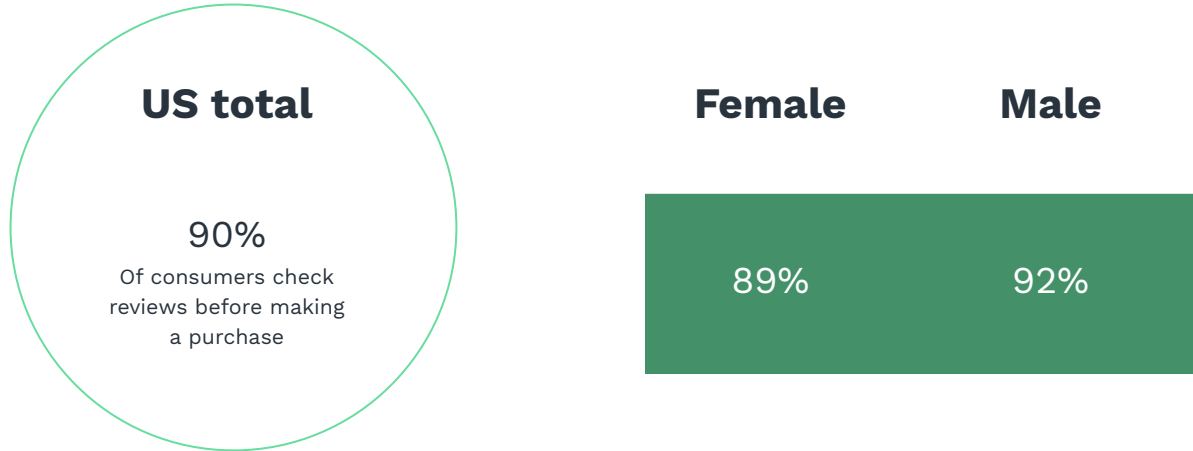
Q: How often do you read reviews on products, companies or services before buying online?

CANVAS8

# **/ Consumers report that they estimate to have wasted approximately $125 on average in the past year due to inaccurate reviews**

**US total**

## $125

Per consumer on
average, over the last
12 months

Q: What percentage of these purchases would you say you first checked the online reviews of?

CANVAS8

# / A mix of both positive and negative reviews is the strongest factor to prompt purchase

| | |
|---|---|
| Seeing a realistic mix of both negative and positive comments but overall positive results | 56% |
| Reviews marked as verified or genuine | 44% |
| Positive reviews from recent months | 43% |
| Reviews that have accompanying pictures taken by others users | 32% |
| Very positive, consistent reviews | 29% |
| Reviews that are easily searchable for specific information (durability, etc) | 27% |

Q: When looking at consumer reviews, what prompts you to buy?

CANVAS8

# / Consumers believe review censorship leads to wasted money and damages freedom of speech

| | |
|---|---|
| Consumers waste money on poor products or services | 52% |
| It gives too much control to businesses | 45% |
| It builds fake company reputations | 42% |
| It removes freedom of speech | 39% |
| It means ethical businesses that don't censor their reviews struggle to succeed | 31% |

Q:What are the biggest risks associated with companies censoring their own reviews?  Please choose the top three most relevant

CANVAS8

CANVAS8