



1WORLD SYNC SURVEY RESEARCH

Consumer Product Content Benchmark

A Deep-Dive on Consumer Trust

FALL 2023



Product Content: The Foundation of Consumer Trust

Trust leads to purchase. This statement was as true 100 years ago as it is today; however, the path to securing consumer trust is shifting in profound ways.

Now more than ever, shoppers have nearly unlimited options for how and where to buy, and are simultaneously relying upon and demanding a massive amount of content to help them toward a purchase, regardless of where that purchase occurs. Many headlines point to the trajectory of e-commerce versus brick-and-mortar retail sales, and no doubt they will keep coming. For me, however, the more interesting story is how the lines are blurring between digital and traditional commercial channels.

Often referred to as hybrid shopping or “phygital,” consumer reliance on digital product content while shopping in stores is now the norm. This includes everything from reading customer reviews of products on their smartphones to scanning barcodes for detailed nutritional information or viewing the product via augmented reality. In many cases, the very reason they arrive at one store over another is the result of search engine research or an e-commerce site visit powered by content that compels them to view or pick it up in person. The inverse is true, as well. Major retailers are deploying in-store content experiences and promotions to keep their customers connected online, and many e-commerce-first, direct-to-consumer brands are finding value in opening flagship retail locations to bolster and sustain their digital properties.

All of this is to say: **Consumer trust is unlocked not at the point of purchase but in the journey to it.** In the pages that follow, I hope you’ll see why accurate, relevant and quality product content is the foundation of consumer trust.



Consumer trust is unlocked not at the point of purchase but in the journey to it.



INTRODUCTION

Steve Sivitter

CEO, 1WORLD SYNC

In 1WorldSync's third annual Consumer Product Content Benchmark, we track the dynamics of trust across several topics essential to understanding how consumers shop in 2023 and beyond, including:

- The factors that most influence a purchase
- The elements of e-commerce PDP most likely to persuade or dissuade a purchase
- The ways consumers research products in their hybrid shopping journeys
- The importance of user-generated product content like customer reviews

The data in this report is based on a randomized, representative sample of 1,500 shoppers in the United States and Canada, commissioned by 1WorldSync and administered online by Pollfish.

I'll conclude with a quick note about what is required behind the scenes to make this trust possible. From the product information fueling supply chains to the proliferation of imagery, rich media and user-generated content on an e-commerce product detail page (PDP), delivering quality product content to consumers requires seamless orchestration. That effort – the harmonization of people, systems, data and content, is largely invisible to consumers, unless it breaks down. The brands and retailers primed to succeed in the hybrid shopping and omnichannel era will invest heavily in mastering their product content orchestration journey.

Thank you for reading, and I wish you a terrific conclusion to 2023 and a successful 2024.

Sincerely,
Steve Sivitter

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When Consumers' Trust is Broken

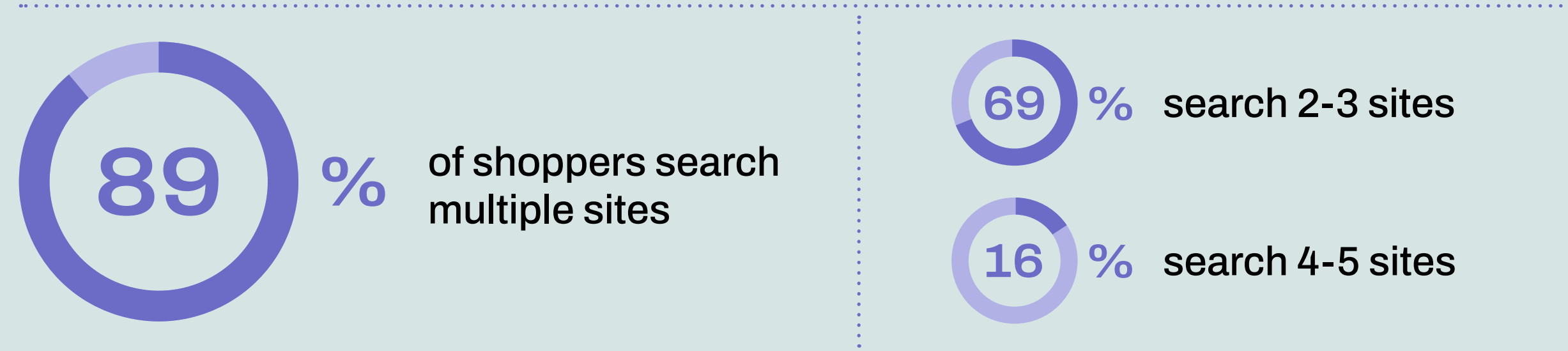
Product Research – How Consumers Build Trust with Brands

Consumers build trust with a brand/product by researching it extensively online. Shoppers don't just look for one product from one brand.

96% of shoppers search multiple items before making a significant purchase with 46% searching 2-3 products and 34% searching 4-5 products.

However, the bulk of product research for most consumers covers fewer than 10 products with less than 6% of shoppers researching more than 10 products before making a significant purchase.

Before making a significant purchase:



Shoppers aren't just looking for brand names. 84% said they value product content over brand recognition when shopping online. As shown in Figure 1, the quality of product content is the most important factor after price. Customer reviews & ratings, meanwhile, outrank other validation points like recommendations from friends or influencers.

When shopping online, what influences your purchasing decisions most often?



Figure 1



THE POWER OF THE CROWD

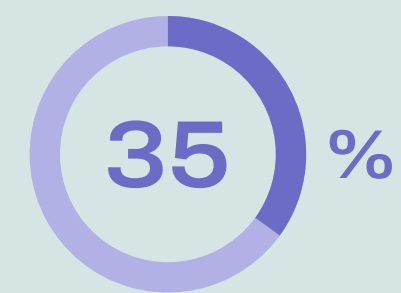
For shoppers under 35 years old, reviews are more influential than product/brand familiarity.

PDP Features

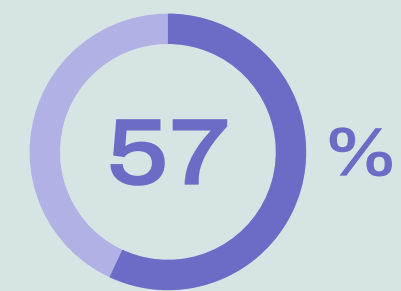
Brands have a lot of opportunities to build trust with new and existing customers through their product detail page (PDP).

Some features elicit more trust than others. The value of PDP features varies. See Figure 2 (next page) for a full outline of which product content features lead to purchase and which cause shoppers to click away. The most important features to consumers are accurate product descriptions, high-quality imagery and ample customer reviews.

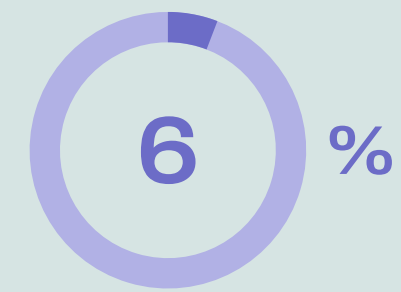
Consumer Adoption of Augmented Reality (AR)



of shoppers have used AR while online shopping via a mobile device



of users found the AR feature to be helpful in getting a sense of the product's size and scale

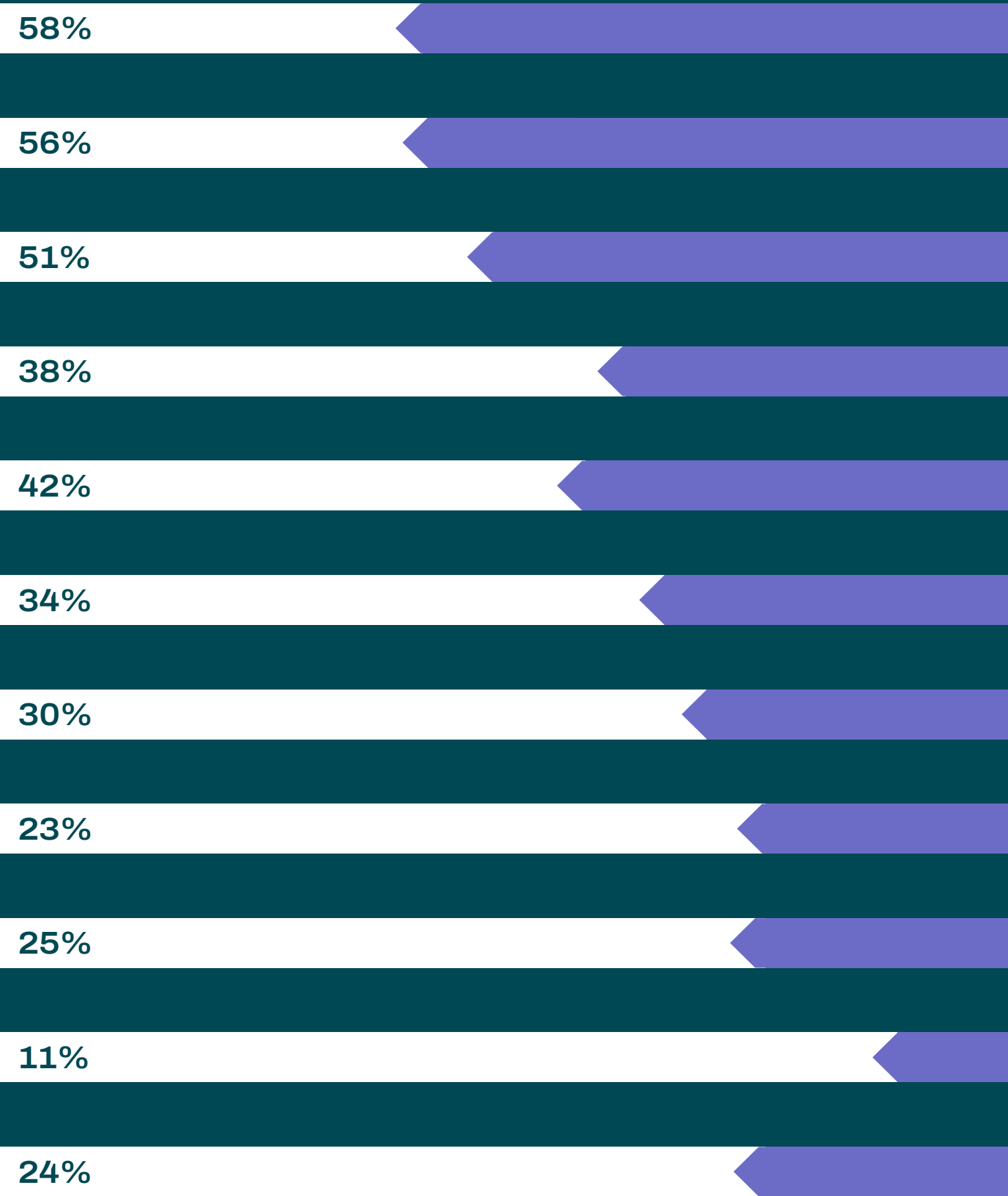


of users did not find the AR feature helpful at all

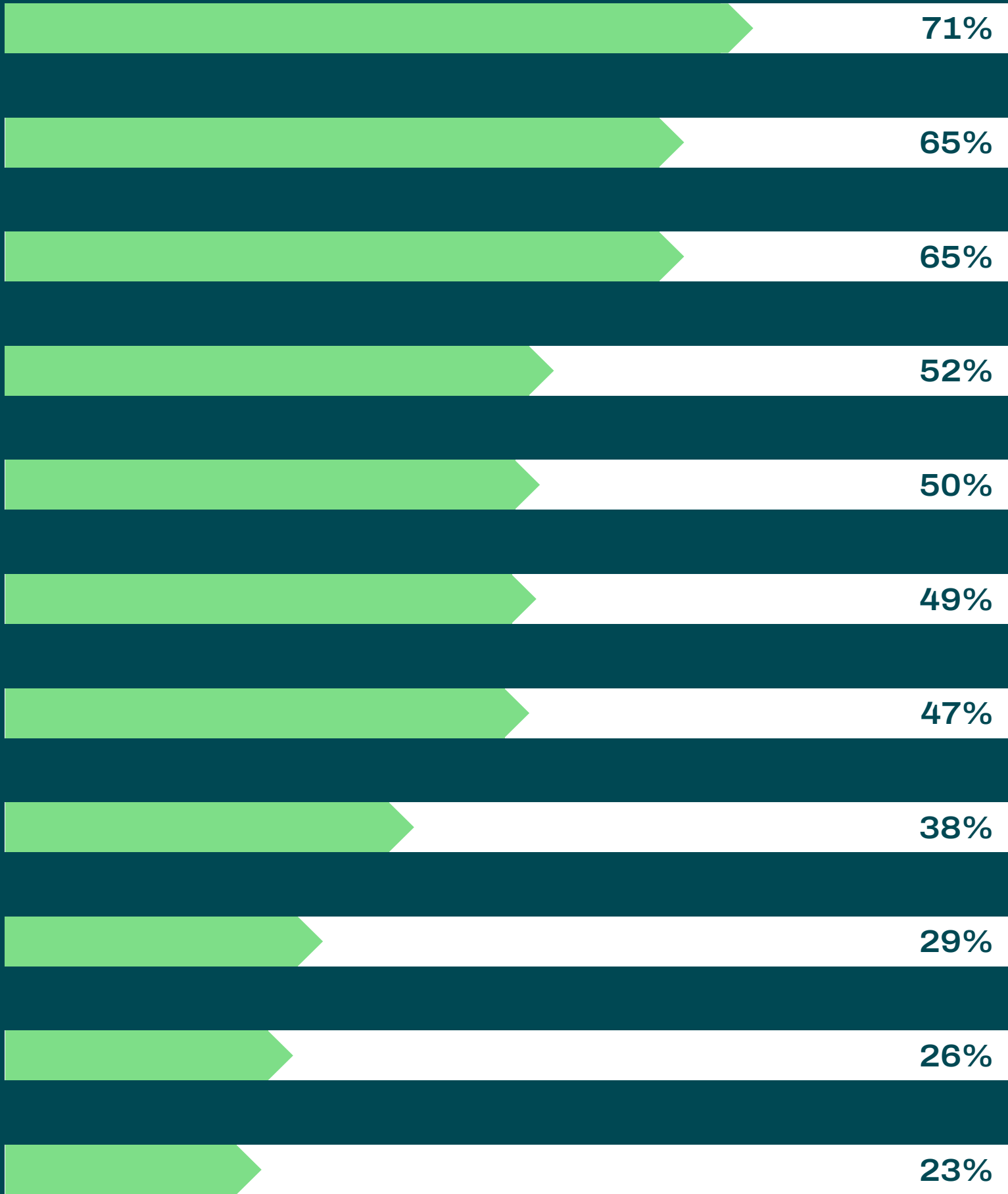


Why Consumers Leave PDPs & Why They Click Buy

IF POOR QUALITY OR ABSENT, HAS NEGATIVE IMPACT



IF HIGH QUALITY/WELL-EXECUTED, HAS POSITIVE IMPACT



Blockers

Drivers

Smart Phone Research

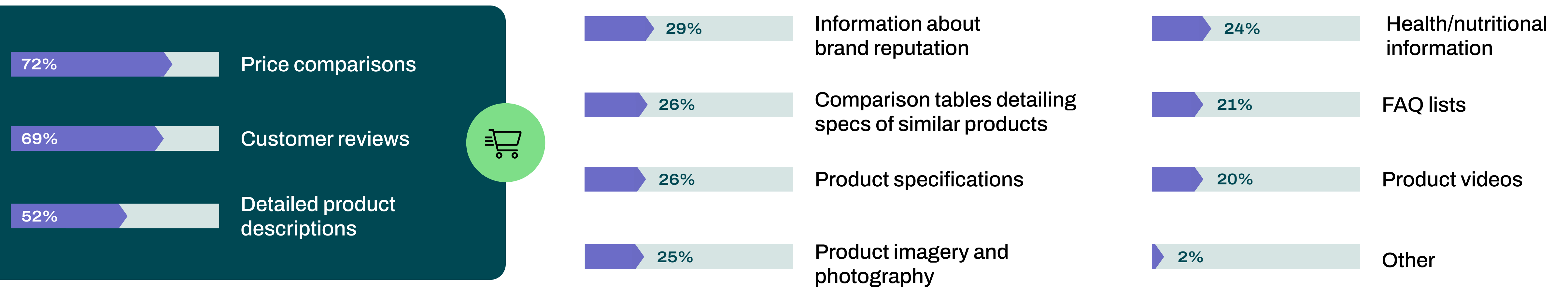
87% of shoppers use their smartphone to research products while shopping in a store at least some of the time. On average, consumers use their phones on about half (49%) of shopping trips.

As shown in Figure 3, price comparisons, reviews and product descriptions remain the most important features of the PDP. Each feature gives consumers insight they can't get just from product packaging.



When shopping in a store, what type of content do you most often look for while researching products on your smartphone?

Figure 3



Online Research Before Shopping In-Store

Virtually all shoppers research product content online before going to brick-and-mortar stores at least some of the time. On average, shoppers conduct product research 61% of the time before each trip – up from 49% in last year’s report.

See Figure 4 for the breakdown of how consumers are conducting product research before heading to the store.

How consumers primarily conduct their online research for products they ultimately purchase in stores:






-  **44%** Search engine to find products and choose a retail location where it’s available and/or has the best price
-  **26%** Professional reviews or independent consumer reports from reputable third party publications
-  **16%** Product or brand’s website
-  **14%** Retailer’s e-commerce site
-  **1%** Other

Figure 4



AI & Product Content Research – Not There Yet!

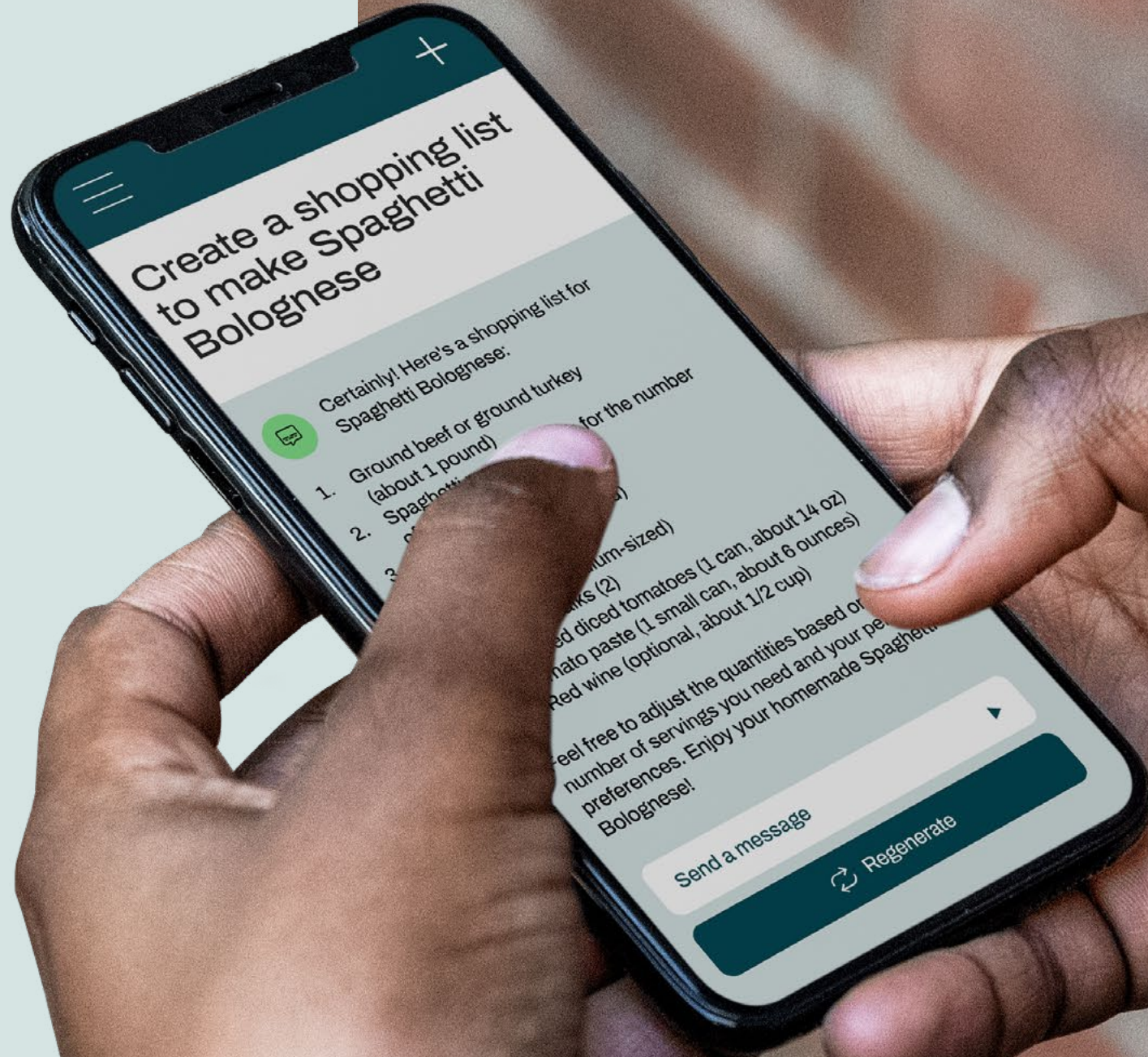
The vast majority (78%) of shoppers do not use or have not heard of AI tools that could be used for researching products online.

22% have used generative AI tools to search for and learn about products before making a purchasing decision

15% of online shoppers have used generative AI tools for creating shopping lists

26% of shoppers find these tools to provide accurate information “often” or “always”

25% of shoppers find these tools to be accurate “never” or “rarely”

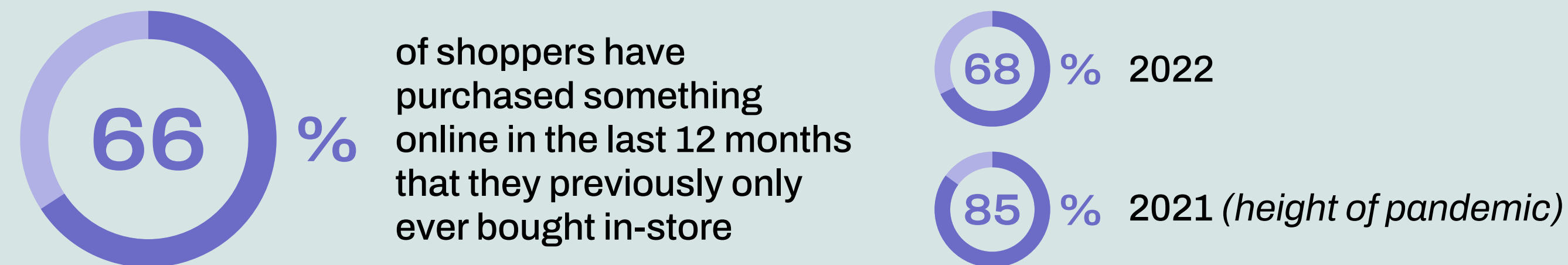


The Channels Consumers Trust

A lot of factors determine whether or not a consumer purchases a product. The channel where that product can be found is significant.

As shown in Figure 5 (next page), the major e-commerce retailers and marketplaces continue to dominate the online shopping scene, with virtually all shoppers using this channel and more saying they've increased their shopping this year compared to last by a net of 20 percentage points. The trend is also benefiting retailer sales via their proprietary mobile apps; and for retailers with large brick-and-mortar footprints, strength in digital is tied strongly to driving online shoppers to their physical locations.

Shoppers are becoming more comfortable moving to e-commerce for new categories:



The leading categories for the in-store to e-commerce switch mirrored last year's report:

(Shoppers who purchased something online in a new category)



Other shopping channels, meanwhile, are losing momentum:



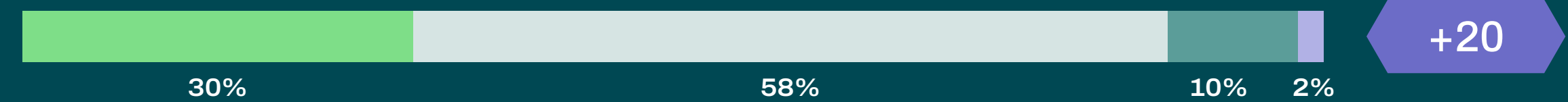
Direct-to-consumer (DTC) channels like brand owned e-commerce sites and social advertising continue to decline in momentum in 2023 (see next page). Now consumers, especially young consumers, are gravitating toward fast-fashion e-commerce sites like Temu and Shein.

Where Consumers Shopped in 2023 vs. 2022

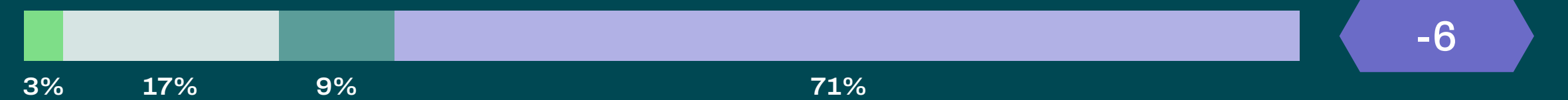
Figure 5

● MORE ● ABOUT THE SAME ● LESS ● I HAVEN'T SHOPPED IN THIS CHANNEL

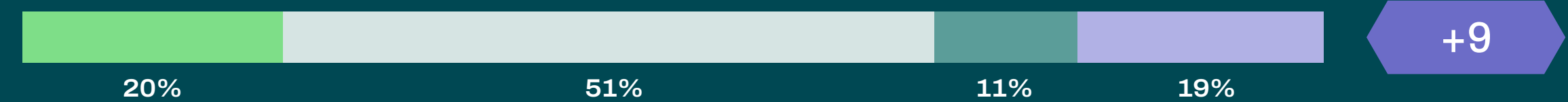
E-commerce sites and marketplaces like Amazon, Walmart, Target **NET CHANGE**



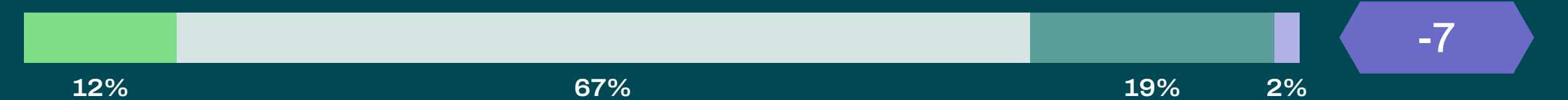
In a "metaverse" marketplace (e.g., shop virtual stores via a VR headset or buy virtual products like NFTs or clothes for your avatar) **NET CHANGE**



Mobile applications operated by a retailer like Target, Walmart, etc. **NET CHANGE**



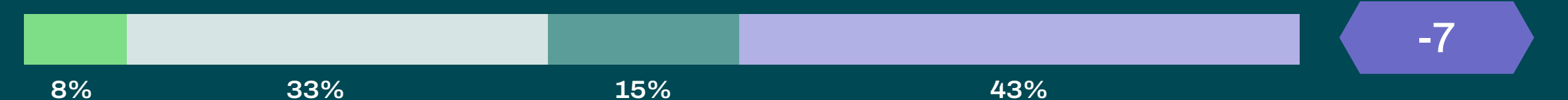
In-store shopping **NET CHANGE**



Budget or fast-fashion e-commerce sites like Temu or Shein **NET CHANGE**



Online peer-to-peer exchanges or marketplaces **NET CHANGE**



Buy online, pick-up in store or curbside **NET CHANGE**



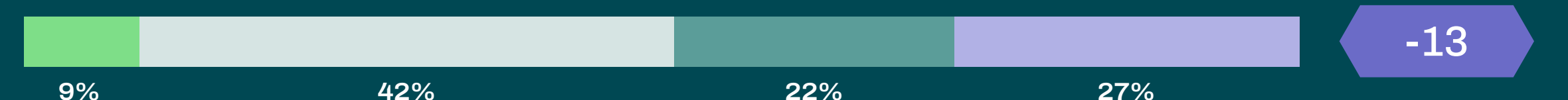
Directly through brands via social media ads & in-app web browsers **NET CHANGE**



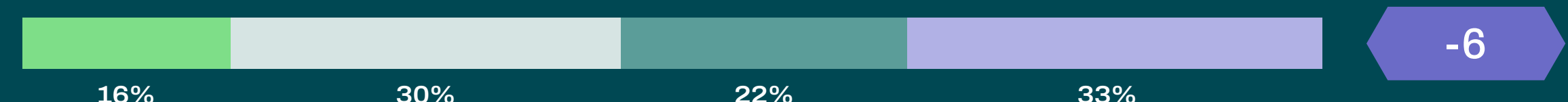
Mobile applications operated by a brand **NET CHANGE**



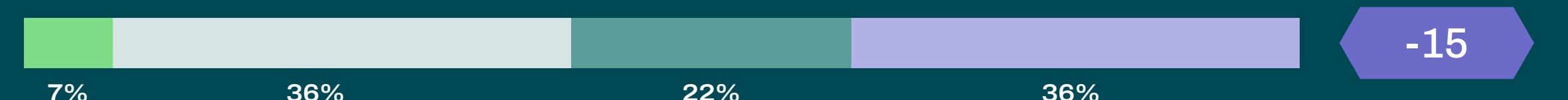
E-commerce shops directly operated by a brand like lego.com etc. **NET CHANGE**



Delivery/courier services like DoorDash, Gopuff, Instacart, etc. **NET CHANGE**



Auction marketplaces like eBay **NET CHANGE**



Budget/Fast-Fashion E-Commerce Sites

As budget or fast-fashion e-commerce sites like Temu or Shein grow in popularity and gain traction online, they still haven't won over all shoppers.

46% of shoppers have never shopped at budget or fast-fashion e-commerce sites like Temu or Shein. Of that group, 39% of that group did not purchase from them due to the perception of their poor quality products, 31% avoided Temu or Shein because of their untrustworthy reputation and 38% aren't familiar with sites like this.


This data indicates that fast fashion/budget sites like Shein and Temu are polarizing for shoppers.



Of those who did shop from sites like Shein or Temu:

-  **92%** were satisfied with their purchases (with a rating of 3 or higher out of 5 stars)
-  **72%** rated their satisfaction with purchases a 4 or higher on a 5-point scale
-  **78%** cited good prices for the value of products received
-  **57%** were satisfied with the quality of product meeting expectations based on content
-  **52%** were satisfied with shipping times meeting expectations

Those who were unsatisfied with their Temu or Shein purchases cited the inverse of the above and:

-  **81%** cited the quality of the product was not as expected based on the site's content

Holiday Shopping 2023

As the holiday season approaches, we asked consumers how they plan to attack their holiday shopping.

In comparison to 2022:



In-Store vs. Online Holiday Shopping

60% 🌲🌲🌲🌲🌲🌲🌲🌲🌲🌲

The average consumer planning to shop online this holiday season predicts they'll do 60% of their shopping this way.




The Importance of Reviews – Who Consumers Trust

While consumers often make purchasing decisions based on recommendations from people they know personally or online, ratings and reviews on the PDP are paramount.

38% of shoppers will not buy a product that has less than 5 customer reviews. Younger shoppers, however, are much more likely to distrust a product based on lack of validation from other consumers. 53% of consumers under the age of 35 will not buy a product with less than 5 customer reviews.

Consumer relationships to reviews vary but the majority (67%) of shoppers often or always read customer reviews before making a purchase. Of the 4% of shoppers who rarely or never read reviews, 46% cite reviews as being too polarized to accurately reflect a product.

Consumers are largely split on whether negative or positive reviews matter more:




 **54%** either favor positive reviews or place equal emphasis

 **46%** say negative reviews have a higher impact



The Sway of Negative Reviews

While only 2% of consumers will stop considering a product after 1 bad review, too much negativity in one sitting could derail a conversion:

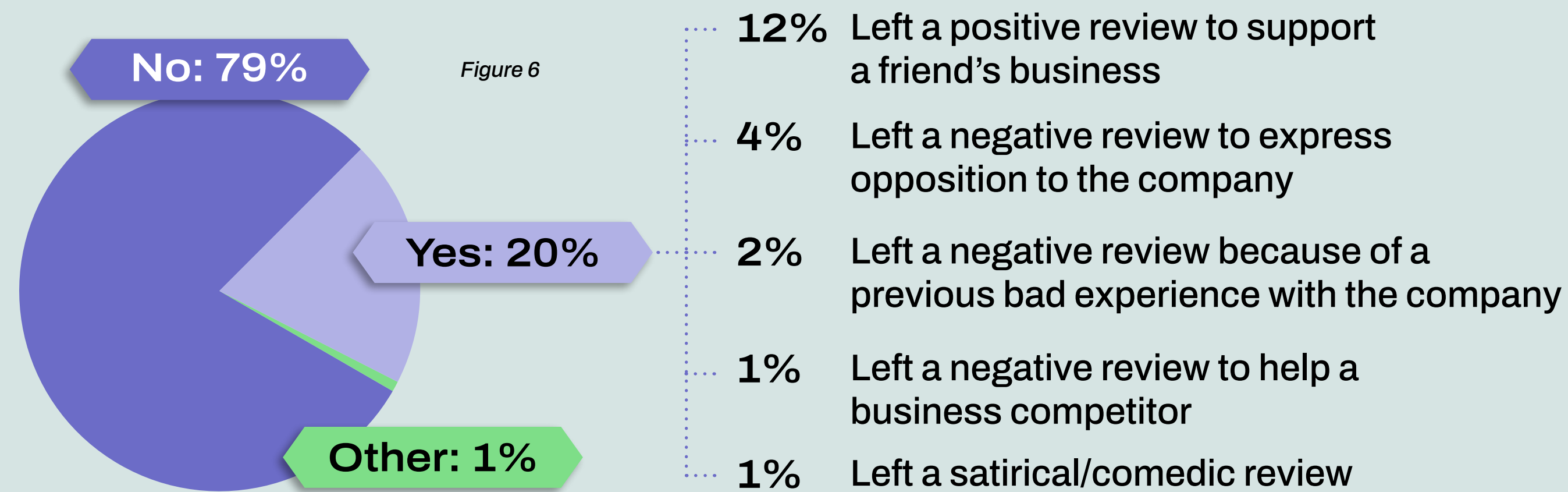
-  **43%** of shoppers will not purchase a product after reading 4-5 negative reviews
-  **30%** won't make a purchase after reading 2-3 negative reviews
-  **25%** of shoppers will still make a purchase despite reading 6+ negative reviews for the product



The Need For Verified, Trustworthy Reviews

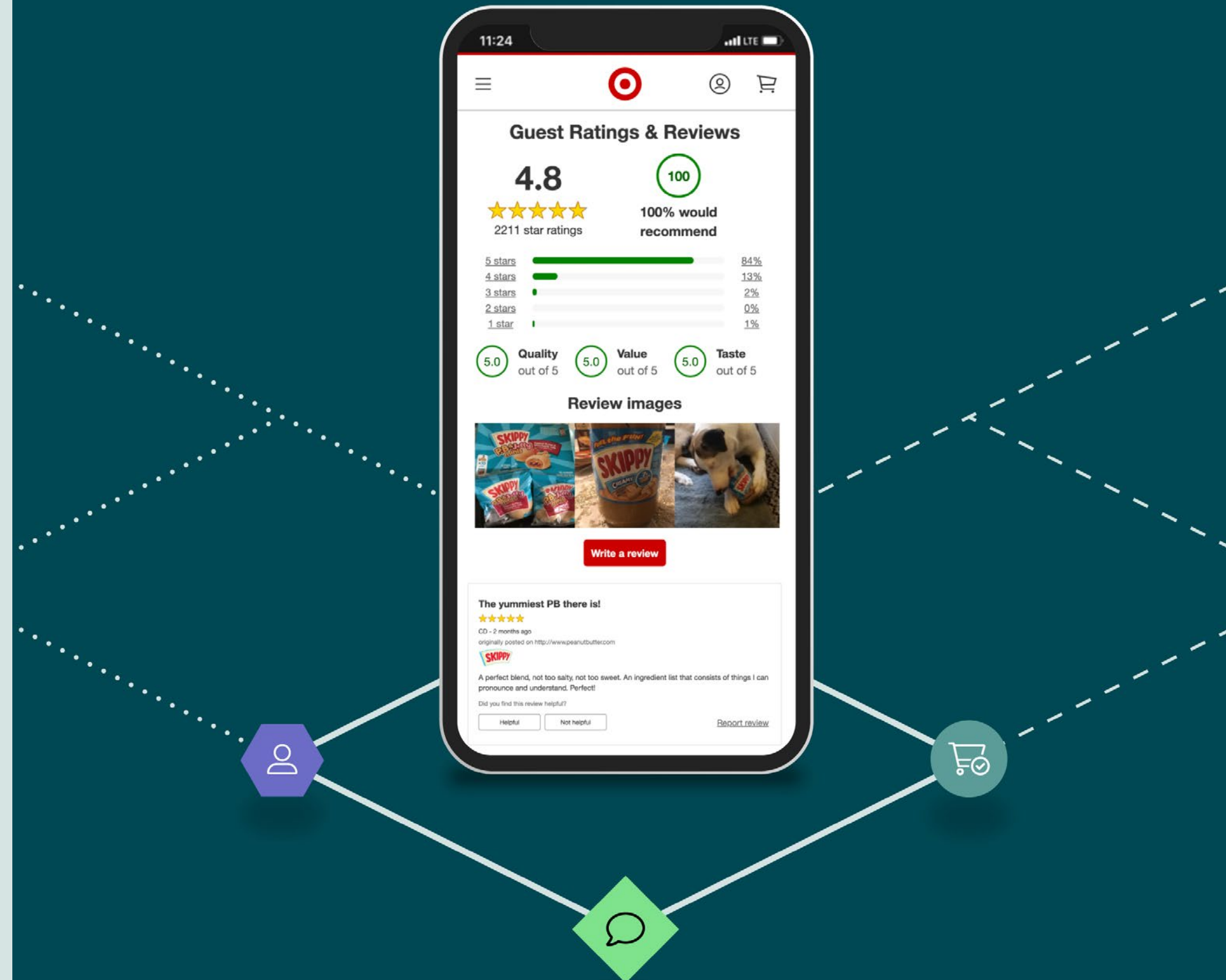
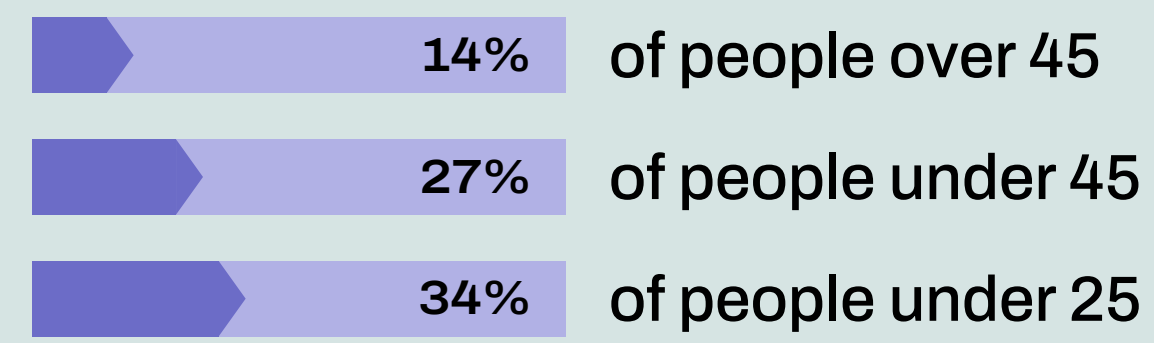
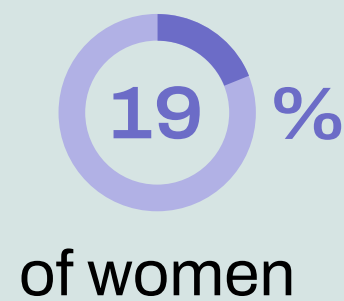
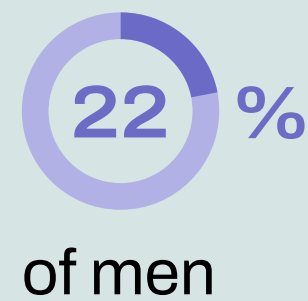
Unfortunately for consumers, not all reviews are actually written by people who purchased the product.

1 in 5 of shoppers have written a review or left a rating on a product they have never purchased or owned



Demographic breakdown:

Of those who have written a review for a product they've never owned or purchased*



These insights outline a need for verified, trustworthy reviews. For further reading, check out research from PowerReviews, a 1WorldSync company.

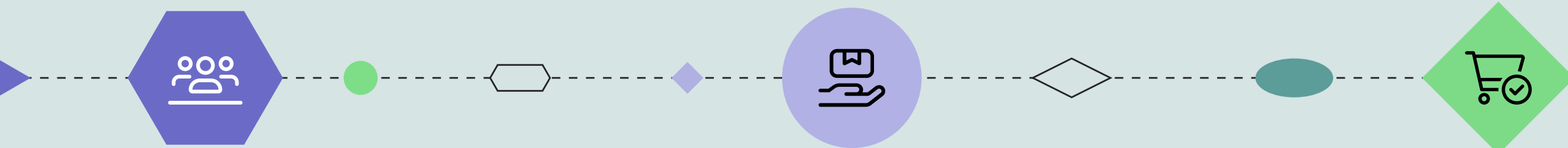


The Influence of Influencers – Who Consumers Trust

You'd guess by scrolling Tik Tok or Instagram that influencers have a hugely significant sway in purchase decisions. But the data shows it's not that big of a factor.

Of the 7 purchase factors shoppers ranked (See Pg. 4) influencer recommendations scored last. Furthermore, just 40% of shoppers have made a purchase in the past 12 months based on an influencer's recommendation and only 23% have done so more than once (See Figure 7).

While it's clear that some consumers are shopping with the input of influencers in mind, it's also true that an influencer recommendation can only take a shopper to a product page. The strength of the product content will still make or break the sale.



Women are slightly more likely to trust influencers than men with 4% -points more having made a purchase based on an influencer recommendation in the past year.



40% of shoppers have made a purchase in the past 12 months based on an influencer's recommendation



23% have done so more than once



61% found that the recommendations of influencers do not or only sometimes accurately reflect the product

Figure 7



The Influence of Influencers – Who Consumers Trust

Social media will remain a prominent way that brands and retailers promote and advertise products to a targeted audience. But which posts have the most impact?

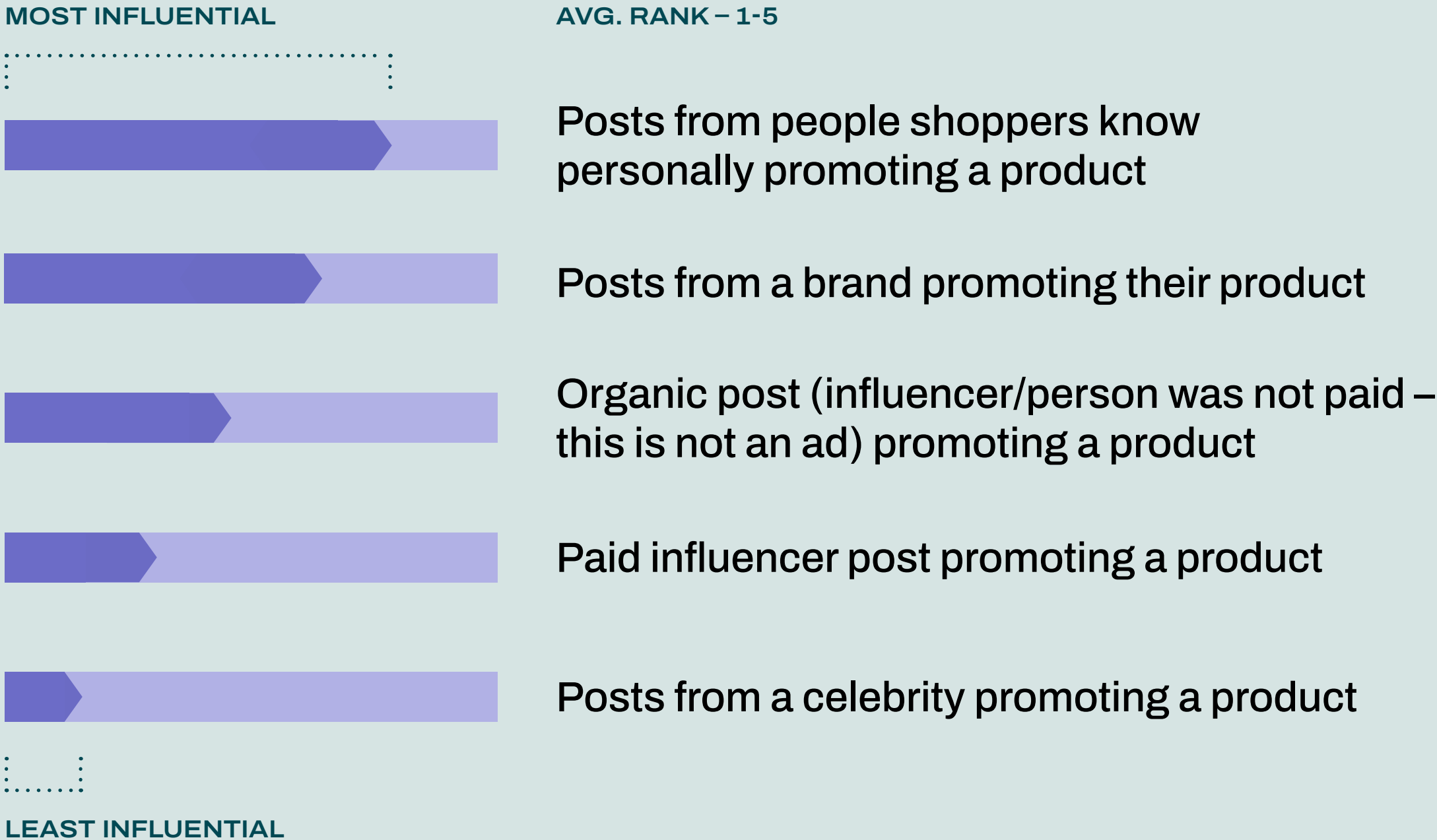


Figure 8



Many consumers want the brands they support to reflect the causes they support:



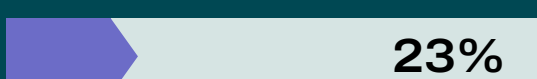


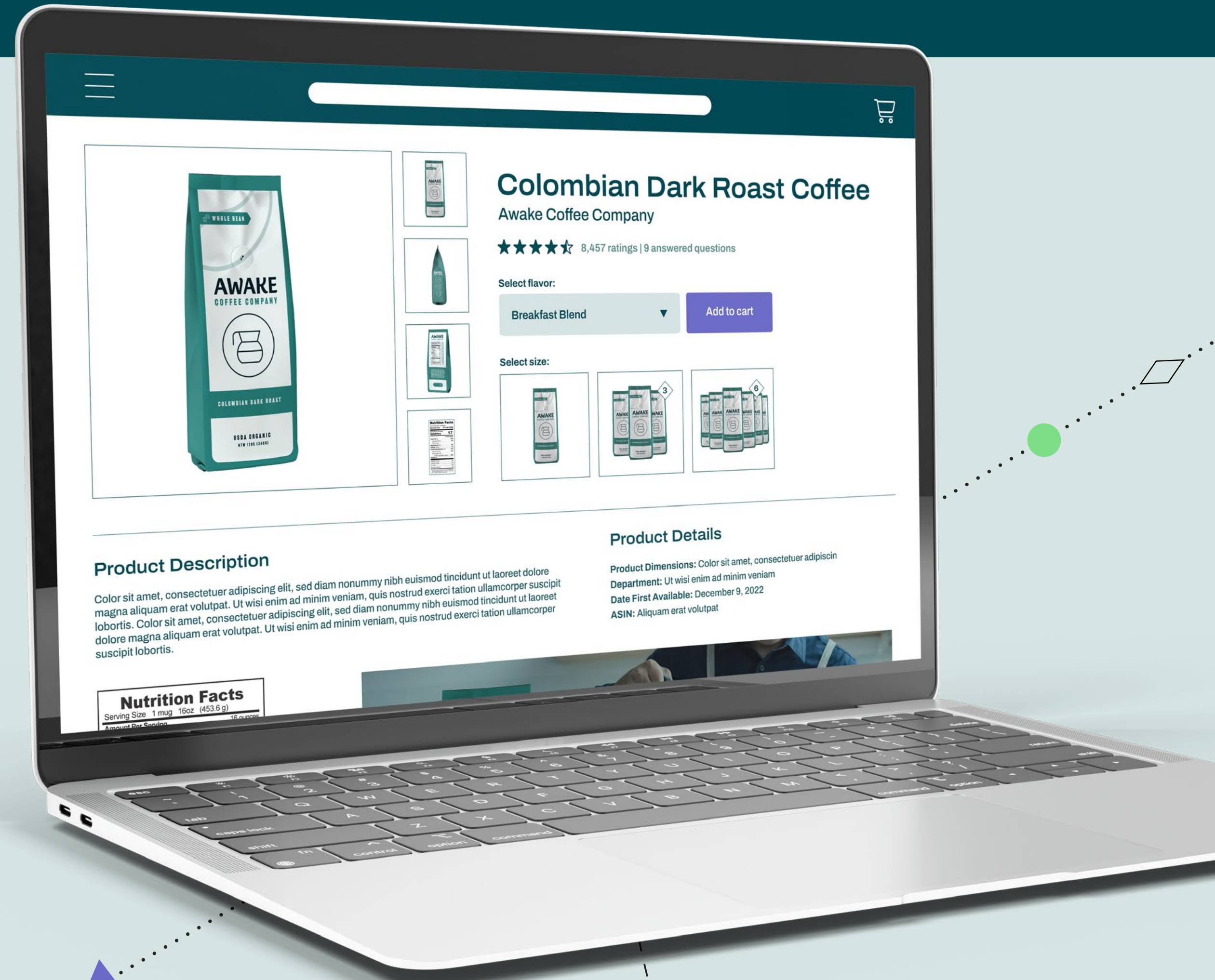
Returns – When Consumer Trust is Broken

When customer trust is broken, the result is often product returns.

-  **53%** of shoppers have received a refund/return in the past 12 months, consistent with last year's findings (55%).
-  **60%** of those returns have been for clothing/accessories.
-  **58%** of those returns were blamed on misleading or poor product content.
-  **31%** blamed misleading/inaccurate product descriptions or features for their returns.
-  **26%** misleading/seemingly fake customer reviews.
-  **28%** insufficient product photography leading to an inaccurate image of the product.
-  **34%** inaccurate product specs.

DID YOU KNOW?

-  **25%** of shoppers will stop shopping from a brand after 1 return
-  **48%** will stop after 2-3 returns
-  **23%** will not stop shopping from a brand due to returns



About This Survey

This survey was conducted online by 1WorldSync via Pollfish in August 2023 among a randomized, representative sample of 1,500 online shoppers in the U.S. & Canada over the age of 18. Margin of error +/- 3% at the 95% confidence level. Results displayed represent the population-weighted, percentage share of the sample selecting each option.

About 1WorldSync

1WorldSync® is the leader in Product Content Orchestration, enabling more than 17,000 companies in over 60 countries to simplify the creation and distribution of impactful content that's accurate, consistent and relevant everywhere commerce happens. Through its technology platform and expert services, 1WorldSync—backed by global investment firm Battery Ventures—solves revenue-impacting product content challenges faced by leading brands and retailers in the CPG/retail, DIY, consumer electronics, healthcare and foodservice industries. 1WorldSync is one of the only product content providers and GDSN Data Pools to achieve ISO Certification 27001.

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