Executive Summary: Long considered a helpful tool for consumers to make informed decisions, online user reviews have become a subject of scrutiny. Reports abound of fake reviews and the dramatic countersteps taken to prevent them. For instance, Yelp has performed sting operations in which it responded to paid review solicitations paid reviews on craigslist, and Amazon.com has banned authors from reviewing works in fields similar to their own and deletes reviews deemed at odds with its vague submission guidelines.

The question is whether consumers can see past bogus reviews as isolated incidents or if such reviews are pervasive enough to threaten the confidence of shoppers. After all, online reviews and ratings are a research staple for consumers, so businesses need to find ways to mitigate skepticism and ensure that users are still getting a reliable experience.

This report examines the controversy around online reviews, analyzes how reviews fit into the shopping process and details how companies can make user-generated content more trustworthy for shoppers.

Key Questions

■ Why are ratings and reviews influential for shoppers?
■ What is the connection between online reviews and sales?
■ How can businesses increase trust?
■ Do negative reviews hurt business?
Fake Reviews: Perception or Problem?

Ratings and reviews have become a staple of the online shopping experience. According to an October 2012 survey by Ipsos OTX and Ipsos Global @dvisor, 78% of internet users considered them influential when making buying decisions. But as ratings and reviews have become more common, their credibility has come into question, with estimates of fraud reaching as high as 30%.

The true extent of fraudulent reviews is difficult to measure and estimates vary wildly. Gartner predicted in September 2012 that by 2014, 10% to 15% of social media reviews will be fake or paid for. That figure isn’t restricted to reviews; it also includes things such as Facebook and YouTube “likes.”

A Cornell University study published in April 2012 compared six popular online review sites and found a much lower incidence of fakery, reporting rates that ranged from about 2% up to about 6%, depending on the site.

On the other hand, Bing Liu, a University of Illinois professor who has studied spam reviews in research sponsored by Microsoft and Google, has estimated that up to 30% of online reviews, depending on the product, could be fake, according to a BusinessWeek article.

How widespread is the problem of fake reviews and what are the implications for online marketers and sellers? Industry specialists differ, but only to a degree—there is virtual unanimity that fake reviews are common and pose at least some threat to the overall credibility of user feedback.

Jim Houlihan, director of content authenticity at Bazaarvoice, a ratings and reviews platform provider, cautioned that some of the alarms raised about fraudulent reviews go too far. Nevertheless, he said, there is certainly some abuse out there. “What better way for companies to get their product more visibility ... than to essentially go after their competitors’ products by writing negative content about an experience or a product?”

Joakim Ditlev, product marketing manager at TrustPilot, an online customer reviews service, warned that the problem could have major repercussions. “If the online review sites are not able to close the gaps and make it harder for those people who cheat, then online reviews won’t be trustworthy at all,” he said. But, he added, “I don’t see that happening right now. There are a lot of things going on to make it more difficult for the villain.”

Others play down the threat somewhat. “From my experience, most consumers have a pretty good BS meter built in,” said Henri Isenberg, COO of ReviewInc, a software provider that monitors reviews and enables businesses to share them. “I think that we don’t give enough credit to consumers to look at stuff and really tell on their own, ‘Wait, this doesn’t look right.’”

Why User Reviews Matter

Ratings and reviews are increasingly considered important to retailers. Ninety-one percent of merchants surveyed by the e-tailing group in 2012 considered them very valuable, up from 69% just two years before.

And the same holds true for other industries. The travel and dining sectors have widely embraced user-generated reviews, particularly through popular aggregators like TripAdvisor and Yelp. Even automotive, healthcare and financial services have opened up to consumer opinion.

The Sales Connection

Why have retailers embraced reviews? Because they drive sales. Bazaarvoice, whose clients include Procter & Gamble and Wal-Mart, shared Q3 2012 data that showed site visitors who interacted with user-generated content were more likely to buy—and return to the site again—than visitors who did not. The data showed the review-reading group was 81% more likely to make a purchase and 27% more likely to make a return visit. In addition, these visitors spent more than twice as much time on the site than those who did not interact with user-generated content.

Furniture retailer Room & Board, a Bazaarvoice client, studied two of its markets where it had no brick-and-mortar locations and found that 68% of its online sales came from items with three or more reviews. Review readers were twice as likely to make purchases and their average order value was 21% higher.

“It’s a very engaged, in-depth customer who’s looking for more information,” said Kimberly Rutenbeck, director of web customer experience at Room & Board. “They’re in a buying pattern, they’re using reviews as that last thing, like going to your friend and saying, ‘Should I buy this?’ That is the tipping point for them, and then they purchase.”

Two studies have demonstrated the impact of online ratings and reviews on restaurants. A 2011 Harvard Business School paper found that on Yelp, one extra star translated to a 5% to 9% increase in revenue, an effect that was felt more markedly by independent operators than chains with an already established reputation.

A 2012 study published by University of California, Berkeley, researchers in The Economic Journal showed that a half-star jump in ratings on Yelp enabled restaurants to fill primetime reservations 49% more often. This result was also more pronounced for lesser-known restaurants, defined as those with fewer reviews.

Clearly, the stakes are high, especially for smaller businesses. Reviews can help level the playing field for brands that aren’t household names. No wonder, then, abuse is common.
The Influence on Purchases

Most US internet users have come to rely on online reviews when deciding what to buy. The Ipsos survey showed that women were much more likely than men (83% vs. 73%) to feel that reviews were at least somewhat useful, with an even larger spread among those who agreed "very much" (38% vs. 26%). Millennials and Gen X were close in overall sentiment, but a far larger percentage of the younger group fell into the enthusiastic "very much" camp (44% vs. 32%).

Demographic Profile of Internet Users in North America Who Think Online Reviews Help Them Decide Which Products to Buy, by Country, Oct 2012

<table>
<thead>
<tr>
<th>% of respondents in each group</th>
<th>Canada</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>66%</td>
<td>83%</td>
</tr>
<tr>
<td>Male</td>
<td>62%</td>
<td>73%</td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-34</td>
<td>72%</td>
<td>84%</td>
</tr>
<tr>
<td>35-49</td>
<td>65%</td>
<td>82%</td>
</tr>
<tr>
<td>50-64</td>
<td>53%</td>
<td>68%</td>
</tr>
<tr>
<td>Income</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low income</td>
<td>54%</td>
<td>66%</td>
</tr>
<tr>
<td>Medium income</td>
<td>65%</td>
<td>77%</td>
</tr>
<tr>
<td>High income</td>
<td>69%</td>
<td>81%</td>
</tr>
<tr>
<td>Total</td>
<td>64%</td>
<td>78%</td>
</tr>
</tbody>
</table>

Note: "agree somewhat" or "very much"


Reviews can be useful right up to the point of transaction. While product reviews are commonly used on individual product pages, adding company or service reviews at checkout can add a layer of confidence farther down the purchase funnel.

Dennis O’Malley, CEO of ReadyPulse, a startup that publishes user testimonials as widgets on retailer sites, said: “Authentic people who are saying, ‘My shipment arrived on time. The quality was fantastic. Customer service answered all my questions. The return policy was phenomenal,’ really give people more confidence to be able to click through. So even if you’re reducing cart abandonment rate by 1, 2, 3, 5%, that’s a significant impact on your ecommerce revenues.”

TrustPilot’s Ditlev noted similar patterns. “We especially see that people feel safer when we put some relevant reviews in the checkout space,” he said. “It’s really the moment right before you leave your credit card details. That’s where most people are in doubt in the shopping process.”

A Question of Trust

Despite concerns that reviews may be bogus, there hasn’t yet been a consumer backlash against ratings and reviews. Search Engine Land’s “2012 Local Consumer Review Survey” found a 3-percentage-point increase in trust for positive reviews between 2012 and 2010. In total, 72% of respondents said they trusted customer reviews as much as personal recommendations. But there were gradations of trust: 28% said they trusted reviews if there were multiple reviews; 24% said they trusted the reviews if they believed them to be authentic; and 20% said they trusted reviews for some types of businesses but not others.

<table>
<thead>
<tr>
<th>US Internet Users Who Compare Prices and/or Read Reviews Before Going Shopping*, Feb 2012</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>11.0%</td>
</tr>
<tr>
<td>Always</td>
<td>19.3%</td>
</tr>
<tr>
<td>Sometimes</td>
<td>69.8%</td>
</tr>
</tbody>
</table>

Note: n=400 ages 18+; numbers may not add up to 100% due to rounding;

*outside the house
Source: AYTM Market Research, Feb 2, 2012
Why User Reviews Matter

Ways Online Customer Reviews Affect Opinions of Local Businesses According to Internet Users in Canada, UK and US, 2010 & 2012
% of respondents

<table>
<thead>
<tr>
<th>Reason</th>
<th>2010</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positive customer reviews make me trust a business more</td>
<td>55%</td>
<td>58%</td>
</tr>
<tr>
<td>I read the reviews but they don't influence my decision on which business to use</td>
<td>19%</td>
<td>25%</td>
</tr>
<tr>
<td>I don't take notice of online customer reviews</td>
<td>26%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Note: 2010 survey had 2,012 respondents from the UK and US only. 2012 survey had 2,500 respondents from the UK and US only. Source: Search Engine Land, “Local Consumer Review Survey,” March 12, 2012

A majority of internet users surveyed by AYTM in August 2012 trusted online reviews at least somewhat, with nearly an equal number split between skeptics and enthusiasts.

Level of Trust in Online Reviews According to US Internet Users, Aug 2012
% of respondents

<table>
<thead>
<tr>
<th>Level of Trust</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very much</td>
<td>14.7%</td>
</tr>
<tr>
<td>Somewhat</td>
<td>65.0%</td>
</tr>
<tr>
<td>Not really</td>
<td>14.2%</td>
</tr>
<tr>
<td>Not at all</td>
<td>6.0%</td>
</tr>
</tbody>
</table>

Note: n=400; numbers may not add up to 100% due to rounding. Source: AYTM Market Research as cited in company blog, Aug 31, 2012

AYTM also found that those who had used Yelp were 13% more likely to be very trusting of online reviews. Familiarity with the concept likely leads to understanding of online reviews’ benefits and limitations.

Specifically looking at consumer electronics buyers, public relations firm Weber Shandwick and KRC Research discovered that 80% of those surveyed in January 2012 had been concerned about the authenticity of user reviews at one time or another. The biggest fear (51%) was that positive reviews could be planted by the manufacturer. Though also a concern, fewer (39%) were worried about defamatory reviews placed by a manufacturer’s competition.

On the flipside, Battery Ventures, a venture capital firm focused on technology, conducted an April 2012 survey that turned up an array of factors that triggered distrust among internet users. Poor grammar and spelling were as suspect as a website that seemed untrustworthy in itself.

Reasons that US Internet Users Might Not Trust An Online Product/Service Review, April 2012
% of respondents

<table>
<thead>
<tr>
<th>Reason</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is on a website that I don't trust</td>
<td>45%</td>
</tr>
<tr>
<td>Is written with poor grammar or spelling</td>
<td>45%</td>
</tr>
<tr>
<td>Is anonymous</td>
<td>33%</td>
</tr>
<tr>
<td>Is too negative</td>
<td>26%</td>
</tr>
<tr>
<td>Follows too many existing reviews with the same opinion</td>
<td>26%</td>
</tr>
<tr>
<td>Is too positive</td>
<td>19%</td>
</tr>
<tr>
<td>Is written by someone who is not similar to me, such as the opposite sex or much younger or older than me</td>
<td>12%</td>
</tr>
<tr>
<td>Is too short</td>
<td>11%</td>
</tr>
<tr>
<td>Is too long</td>
<td>11%</td>
</tr>
<tr>
<td>None of these</td>
<td>9%</td>
</tr>
</tbody>
</table>


All of these answers are enough to give businesses pause, especially considering how many of these reported tipoffs of fraudulent reviews may also be features of genuine reviews.

Regardless of appearances of trustworthiness, having reviews can produce better results than displaying none at all. TrustPilot’s Ditlev runs split tests for clients. “We typically see that the performance is better with the one including reviews … which boils down to the fact that it is trust-building and people feel more safe,” he said.

As ubiquitous as reviews have become in retailing, there remain numerous high-profile holdouts, including the J. Crew and Williams-Sonoma Inc. families of brands, and many luxury retailers.

For services like travel, though, the absence of reviews can be a deal-breaker. In a September 2012 PhoCusWright survey of TripAdvisor users, more than half (53%) said they would not book a room at a lodging with no reviews. This reluctance was also borne out by the ReviewInc survey in which 48% respondents would not take a chance on a professional service like a doctor or lawyer without reviews. The figure was even higher for hotels and restaurants (64%).

ReviewInc’s Isenberg noted that a lack of reputation is just as bad as a poor one: “That’s what social media has done. It’s moved us to a realm where you expect to find someone’s reputation online. You have to have reviews.”

Online User Reviews: Building Trust and Boosting Sales
How Brands and Retailers Build Trust

Though few will disclose the mechanics, many sites are using fraud detection platforms with defined rules and algorithms to prevent fake reviews from showing up in the first place.

But beyond staving off overt attacks, companies have different approaches to how much user-generated content makes it onto the web and how ratings and reviews are displayed in ways that instill confidence in users.

Authenticating and Filtering Reviews

Bazaarvoice’s Houlihan is for transparency, as long as a review doesn’t break rules. “If you proved [the review is] fraud-free and it hasn’t violated any legal issues, then it needs to go up on the client’s site and it needs to be able to tell the accurate story.” He stressed the importance of disclosing factors like whether an employee wrote the review or if the author received free shipping as an incentive so that consumers can make informed decisions.

Others prefer to exert greater degrees of control. According to Vince Solitto, vice president of corporate communications at Yelp, one-fifth of Yelp’s review submissions don’t make the cut and end up on a CAPTCHA-protected filtered page. “It’s somewhat counterintuitive for some people, because we’re a user-generated content website and folks think we would want to show as much user-generated content as possible, but we are so fixated on content integrity and maintaining consumer and user trust that we’re willing to pay the high price of not even displaying about 20% of the content submitted to us because we don’t have the same degree of confidence in it that we do the other 80%.”

Businesses are grappling with maintaining a balance without ostracizing users. A five-star review from a user with only one review under his belt is likely to get filtered by Yelp, despite the fact it could have come from an enthusiastic newcomer. Amazon has faced a recent outcry over its review policy, which includes deleting reviews and banning authors from reviewing books in their own genre, as well as removing reviews determined to be written by authors’ friends or family.

One review-filtering approach is to let users decide which reviews they want to take to heart by authenticating that a reviewer has actually bought a product or used a service and making that detail known on reviews. Amazon designates reviews from its online buyers with an “Amazon Verified Purchase” badge. Similarly, Expedia uses a “verified traveler” notation. On Drugstore.com, it’s “Verified Buyer.”

Since it’s a lead generator, not an ecommerce site, TripAdvisor doesn’t practice verification. Adam Medros, the company’s vice president of global product, argues that restricting review privileges to only those who paid for a transaction can limit legitimate responses and that participants solicited for reviews through email will be more inclined to post positively than reviewers organically inspired to write something. “That system is just prone to a lot of bias, whether it’s a perceived bias in terms of business operations or whether it’s a selection bias in terms of who actually contributes the content,” he said.

Soliciting Reviews

Since more reviews increase trust and have the potential to aid sales, building up a stable of them is important. Simply asking for a review is key. Many businesses fail to do that, said ReviewInc’s Isenberg: “You’ve got to ask. If you don’t ask, the people that will post are the angry ones because they are motivated.”

According to ROI Research, half of social network users respond to retailer prompts to provide feedback. Organically, though, they are more likely to comment on a social network (44%) than post a review on a site (38%). Those ages 30 to 49 had the highest propensity to post reviews on brand and retailer sites (45%).

One way of encouraging a review is through a follow-up email. For example, consumers who book restaurants through OpenTable or rooms through Hotels.com will be asked for feedback on their experience. Bazaarvoice’s Houlihan estimated that 80% of his company’s client reviews are solicited in what’s called a “post-interaction email.” Room & Board thinks omnichannel and sends follow-up messages to the 85% of customers that have provided email addresses, whether they bought online, in-store or via phone. Despite only having 11 locations, 60% of the furniture retailer’s user reviews come from in-store shoppers.

TripAdvisor uses email to encourage reviews, but enticements can compromise integrity. “What’s not OK is to offer incentives, because it ultimately biases the opinions toward the positive and [away from] the negative. Nobody’s going to write a negative review and then collect their discount. And it also biases the results towards companies that have larger marketing budgets,” Medros said.

Allowing Negative Feedback

Companies resistant to implementing user-generated content are often afraid of negative feedback, and yet seeing a wide range of opinions is what makes reviews seem more authentic. “Negative reviews give all the other reviews legitimacy,” said Room & Board’s Ruthenbeck. The furniture retailer screens for inappropriate content, but beyond that, anything goes.

Research shows that businesses have less to worry about by allowing user-generated content than they may think. Consumers are more likely to post about good experiences. A September 2012 TripAdvisor survey found that three-fourths of the TripAdvisor users who wrote reviews shared positive experiences.

TrustPilot’s Ditlev explained that based on user tests, they could see that after a shopper looks for an overall score and
good reviews, they scroll until they see negative feedback. “They look for the holes in the cheese. If the company is really quick and responsive and deals with the negative feedback in a good way, that can actually be more powerful and trustworthy than just having a straight line of five-star ratings.”

Bazaarvoice’s Houlihan concurred: “We always tell our clients it’s OK to have negative reviews. If you’re a consumer and you’re looking at a site, you should see probably a one- or a two-star review periodically on a product or a service just because not everyone wants what you do. If you see nothing but straight five-star reviews on every single product on that site, you probably want to scratch your head and question if that’s reality.”

To this end, many retailers use the pro-and-con approach, displaying one of each at the top of a product review page. On Target.com, the first reviews displayed are the “most helpful” 4- to 5-star user reviews alongside the “most helpful” 1- to 2-star write-ups. For an item like flatware, the negative may speak to rusting issues and flimsy build, while the counter opinion praises the weight of the stainless steel and cites no problems with discoloration despite being in a humid climate.

Less-than-stellar reviews also allow the opportunity for service providers, manufacturers and retailers to publicly address problems. The above mentioned TripAdvisor survey also showed that 84% of respondents thought management responding to a negative review “improves my impression of the hotel.”

Room & Board’s Ruthenbeck emphasized the importance of accepting genuine critical feedback and responding to it not just with online comments, but with product changes. “Do something about it. Don’t let them sit there,” she said. For instance, the company changed an upholstery fabric that was getting complaints. And in response to negative comments about rugs that were shedding, the company adjusted its product description, explaining that new wool rugs commonly shed.

Personalizing Experiences

Authenticity is the most critical factor for consumers looking at reviews, according to Erin Defosse, vice president of strategy at Bazaarvoice. Once veracity has been established, reviews tailored to the searcher’s style are the next most important criteria.

“Some consumers want to see very well-thought-out, long descriptions with very technical content about a product, and that makes them feel comfortable. Other people want to see more concise, but more experiential, descriptions of what being with the product is like. And that really maps to the individual.”

For example, one shopper may want to know every last technical spec on a new flat-screen TV, while someone else may be more interested in the TV’s design and would benefit from seeing photos of how it fits with a reviewer’s living room decor.

Many sites now allow filtering by myriad criteria to provide the most customized results. This can be especially useful for deciding on experiential products bought online, like makeup. Sephora not only has a robust set of reviews—it’s not unusual to see more than 1,000 for certain items—but the company also offers filters for skin type, skin color, eye color and age, so shoppers can find reviews that match their own concerns. Additionally, a product like foundation can be further filtered by characteristics that reviewers have assigned. If “moisturizing,” “dewy,” or “natural” are what matters to a shopper, only reviews tagged with those keywords will display. The reviews can also be sorted by metrics such as long vs. short, video or photo reviews first, or those voted most helpful by others.

Room & Board has found that personalized filtering of reviews is helpful. Reviews on its site are broken into four sections: product, delivery/service, type of dwelling and where in the home the product is used. Reviewers’ profiles also show where they live and their design style. For example, a user might filter responses to see only sofa reviews tagged as “good for small spaces” from apartment dwellers with minimalist taste, bypassing reviewers who consider themselves as having a traditional style or those with houses in the suburbs.

TripAdvisor’s Medros thinks people are savvy enough to identify meaningful reviews. “I’m equally skeptical of the person that thinks the two-star hotel is the greatest thing ever but doesn’t seem to travel very often, or the person that pans the Four Seasons yet doesn’t seem to be a typical Four Seasons customer,” he said.

“Users are actually pretty smart about parsing the information that they’ve been given about who this person is.”

Enforcing Consequences

Many businesses rely on self-governance and give users the power to flag suspicious reviews, but increasingly sites themselves have stepped in and taken a more active role, using public shaming as a deterrent.

TripAdvisor has a content integrity team with more than 100 staffers to sniff out abuse. In extreme cases, “red badges” are put on a webpage, warning users that there is “reasonable cause” to suspect that a business has been tampering with reviews. Medros suspects that the typical user won’t often come across these online admonishments since out of 20 million businesses only a few dozen have one at any given time.

“There are very few of those red badges up on the site and they usually don’t stay up very long because owners, while they might sometimes try to test the system, really don’t like the results when they get caught,” he said.

Yelp has also been proactive about bogus reviews. In October 2012, the company embarked on a sting operation to catch companies advertising on craigslist for paid reviews. Those who took the bait found themselves with a consumer alert on their profile pages. Whether Yelp will be able to ferret out every case of chicanery is a valid question, but a message has been sent that posting fake reviews will potentially be called out.
Conclusions

Consumers haven’t lost confidence in user reviews, but companies still need to remain vigilant. Trust can be lost as quickly as it is won, so reliability needs to be conveyed, whether through showing a full spectrum of positive and negative feedback, letting users turn to their social circle for advice, or making results relevant for their individual needs.

To maintain authenticity, new standards are constantly being developed. Some sites have taken matters into their own hands, calling out offenders and highlighting top reviewers or those with direct product or service experience in order to instill confidence. Behind the scenes, companies like Bazaarvoice have been working in conjunction with the Word of Mouth Marketing Association to create a seal of approval to show that businesses are abiding by set ethics policies.

Consumers deserve credit. Any way that brands and retailers can protect shoppers from fraudulent ratings and reviews is welcome, but at this point a majority of US internet users are seasoned social media users and online buyers (66% and 58.3%, respectively, according to eMarketer). Most internet users have the experience and sense to detect when something seems too good to be true or looks suspect.

eMarketer Interviews

TripAdvisor’s Scale Ensures More Trustworthy Reviews

Adam Medros
Vice President of Global Product
TripAdvisor
Interview conducted on January 9, 2013

Furniture Store Gives Good and Bad Reviews Equal Play

Kimberly Ruthenbeck
Director of Web Customer Experience
Room & Board
Interview conducted on January 15, 2013

Yelp Calls Out Businesses for Fake Reviews

Vince Sollitto
Vice President of Corporate Communications
Yelp
Interview conducted January 10, 2013

Erin Defosse
Vice President of Strategy
Bazaarvoice
Interview conducted on August 31, 2012

Joakim Ditlev
Product Marketing Manager
TrustPilot
Interview conducted January 3, 2013

Jim Houlihan
Director of Content Authenticity
Bazaarvoice
Interview conducted on December 20, 2012

Henri Isenberg
COO and Partner
ReviewInc
Interview conducted on January 16, 2013

Dennis O’Malley
CEO
ReadyPulse
Interview conducted on January 3, 2013
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