

The future of US retail: Trust, returns, AI and the new consumer

Trustpilot is the world's largest independent customer feedback platform, with **361 million active reviews** worldwide. To identify the most influential trends in the retail industry, we analyzed reviews written by US consumers in 2025, examining topics, trends and sentiment - here are the key findings.



Our latest report summarizes the **most vital trends for US retail leaders in 2026**. Insights are drawn from Trustpilot's proprietary review dataset of over **4.5M consumer voices**.

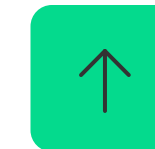


Report Methodology

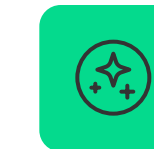
- Analysis of reviews written on Trustpilot by US consumers for retail businesses in 2025.
- Research conducted in **February 2026**.
- The sentiment model used identifies emotions behind customer feedback, studying reviews sentence by sentence rather than giving a single overall score.
- Analysis uses a specialized, multilingual AI model to **categorize feedback into specific topics at a detailed level**.



Key Takeaways



Review volume increase hides important sub-sector stories.



Consumers like AI for product discovery/visualization, but dislike it when it replaces human support during a problem.



Returns are the most important trust signal in US retail.



Our analysis has identified **8 strategic fixes** for retailers to respond to these trends. Read on to find out more.



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Introduction

The US retail landscape is undergoing a transformation. AI is reshaping product discovery, personalization, and customer service, while consumer expectations increase (for returns, fulfillment, and price transparency). This report is for US retail leaders, who want to understand the emerging trends in their industry, and how to navigate them.

48%

growth in high-end retail
review volume (2023–2025)

-1.69 ★

star drop when returns are
mentioned in US reviews

60%

of AI-related retail
reviews are 1-star

82%

of December review
volume retained in January
(returns window)

Review Volume insights reveal category shifts

Trustpilot's retail review data shows a sector in transition. Globally, review volume peaked in 2024 before a slight decline in 2025 - but this headline hides sub-sector stories, with implications for US retailers.

THE HIGH-END SURGE

The most significant shift in the data is the accelerating growth in the high-end retail segment. Globally, high-end retail review volume grew by almost 48% between 2023 and 2025. This reflects a shift in consumer values. Driven largely by Millennials and Gen Z, consumers are pivoting away from disposable 'fast fashion' towards durable, sustainable, and quality-driven purchases. The 'quiet luxury' trend has emerged, rewarding brands that communicate craftsmanship and longevity.

For US retailers, this represents both an opportunity and a warning. Brands that continue to compete purely on price and volume risk being left behind by a consumer base willing to pay more for less - if the quality, service, and returns process they experience justify a premium.

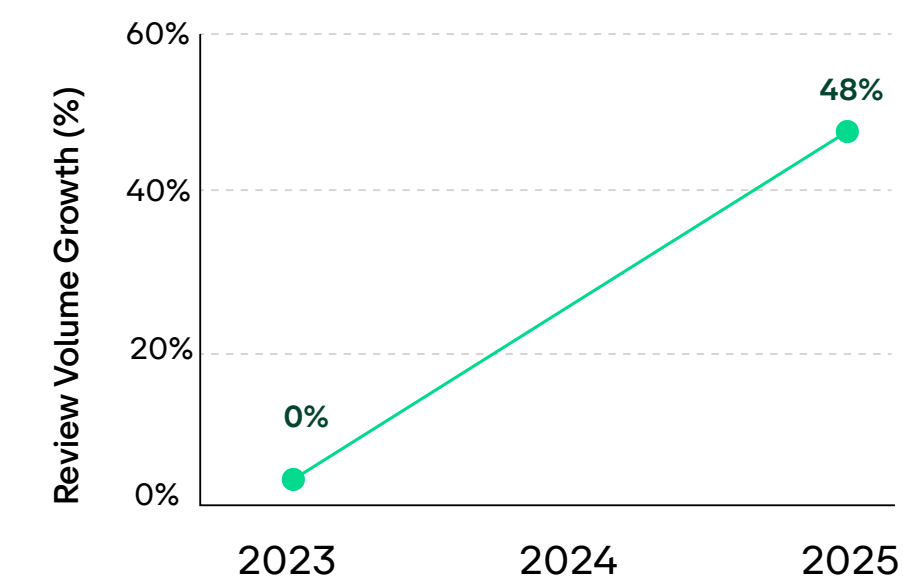
TWO RETAIL WORLDS ARE COLLIDING

The data shows a high-end, quality-driven segment growing in volume and satisfaction, and a mass-market, online marketplace decreasing in both. In the US, overall star ratings have dipped below 4.0.

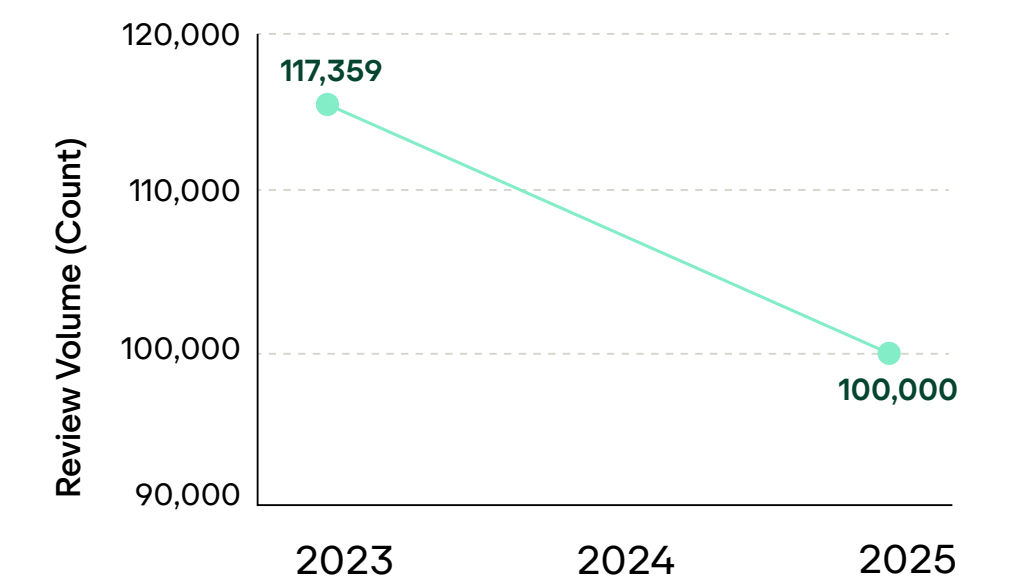
ONLINE MARKETPLACES: A STEADY DECLINE

Online marketplaces are experiencing a sustained decline in review volume across all major markets. Marketplace review volume fell from 117,359 in 2023 to almost 100,000 in 2025. This decline reflects growing consumer fatigue with the marketplace model - concerns about counterfeit products, inconsistent quality, and impersonal customer service, driving consumers toward more curated, brand-direct experiences.

High-End Retail:



Online Marketplaces



Review Volume insights reveal category shifts

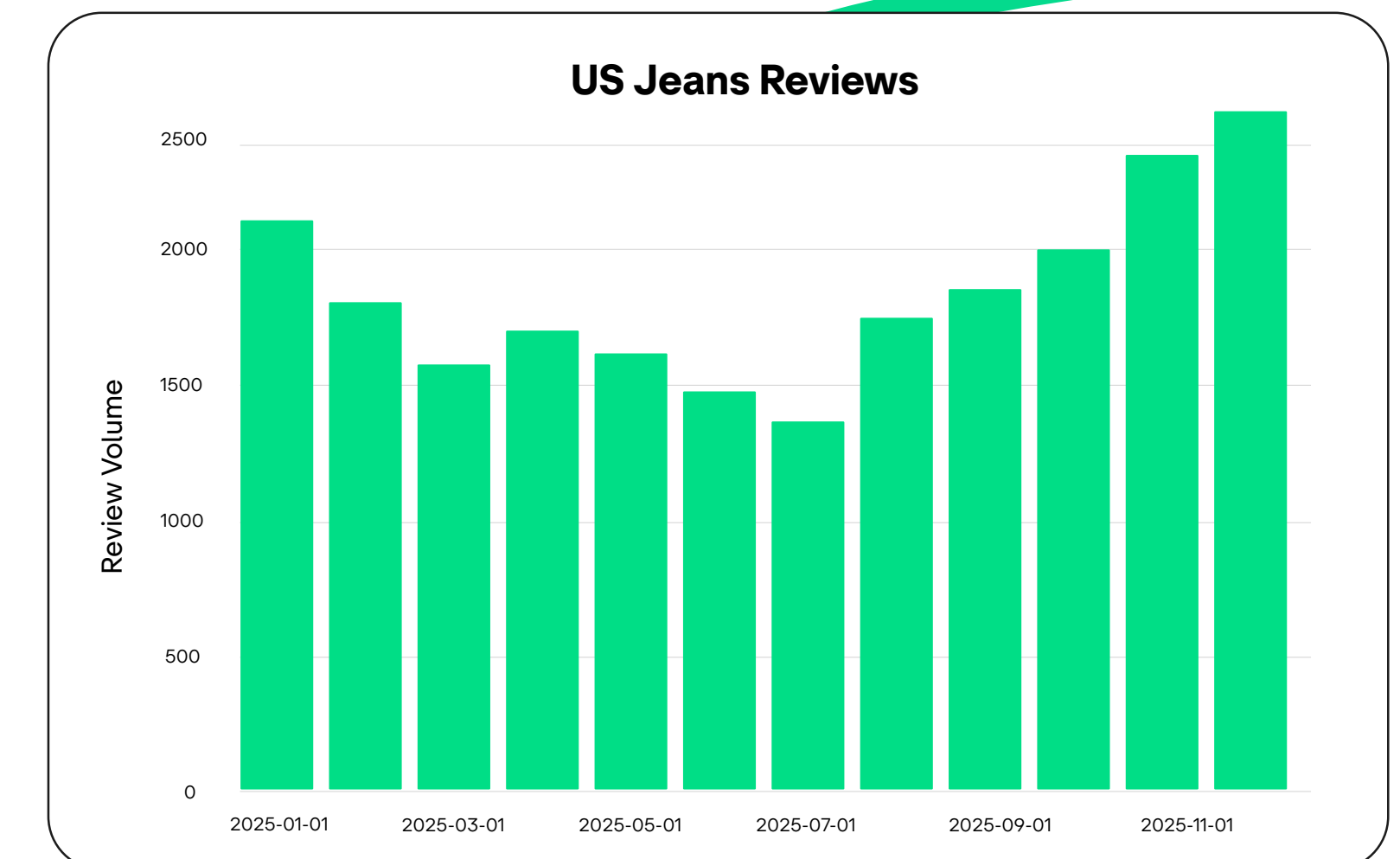
SEASONAL PATTERNS: THE RETURNS WINDOW

December consistently records the highest review volume month, with an average 20–27% month-on-month growth compared to November. Critically, January retains approximately 82% of December’s peak volume - underscoring a crucial insight: the post-holiday returns window is almost as important as the shopping period itself. US retailers treating January as a “wind-down” month may be missing an opportunity to convert returns challenges into loyalty.

CELEBRITY PARTNERSHIPS AS VOLUME CATALYSTS AND LIGHTNING RODS

The data provides a compelling example of how high-profile brand partnerships can dramatically shift consumer engagement, though not always without friction. Following the Sydney Sweeney American Eagle campaign launched in July 2025, monthly review volume for jeans in the US jumped from 1,400 in July to over 1,800 in August and continued to rise, marking a +199.61% increase in Q4 2025 compared to the previous quarter.

While the campaign attracted one million new customers and coincided with a 10–30% surge in the brand’s stock price, it was also highly polarizing and heavily criticized in the US, prompting competitors to rush out counter-messaging. Furthermore, this volume surge correlates heavily with the traditional back-to-school shopping season, where denim purchases naturally peak in August. Rather than proving the campaign purely drove sales, the data suggests that inserting a brand into a highly debated cultural zeitgeist – amplified by seasonal demand – serves as a massive catalyst for consumer noise and review activity. For retailers, the takeaway is less about universal adoration and more about the power of becoming a central talking point during critical buying windows.



Understanding the effects of AI on the retail experience is urgent

Of all the themes in this proprietary dataset, the consumer response to AI is the most urgent for US retailers. Based on an analysis of 16,624 AI-related reviews (6,377 from the US), the picture is one of polarization: consumers either love AI or they strongly dislike it - the determining factor is at what stage AI is used in the customer journey.

WHERE AI WINS: DISCOVERY AND VISUALIZATION

Consumers respond well to AI when it improves discovery and pre-purchase experiences. Smart search tools that understand contextual queries, virtual try-on features, and AI-powered style recommendations are described as game-changers in positive reviews.

WHERE AI FAILS: AFTER-PURCHASE SUPPORT

When AI is used as a substitute for human customer service - particularly post-purchase, involving wrong items, missing refunds, or delivery failures - the consumer response is negative. Customers describe feeling trapped in automated loops, unable to reach a human agent to resolve issues a chatbot cannot deal with.

THE ALGORITHMIC STYLIST

In the US, consumers are increasingly expressing the belief that brands have replaced skilled human stylists with recommendation algorithms, resulting in duplicate item suggestions, a lack of nuance, and a deterioration in brand quality. This is a consequence of over-relying on AI for curation, a reputational risk difficult to reverse once it takes hold.



Returns are the most important trust signal in US retail

No operational factor has a greater impact on US retail trust scores than the returns process. Trustpilot's analysis of reviews across the US reveals that the returns process is a brand-defining moment that can alter a consumer's loyalty permanently.

THE US RETURNS PENALTY

Mentioning returns in a US review correlates with a drop of 1.69 stars - the largest penalty across all markets - and a sentiment swing from a positive score of approximately +0.50 to a deeply negative -0.30. This is not simply a matter of dissatisfied customers leaving reviews; it reflects a breakdown in the contract between retailer and consumer.

A BREAKDOWN OF RETURNS FRICTION

Not all returns are equal. The data reveals a hierarchy of returns experiences:

US consumers are the most vocal about restocking and usage fees, viewing them as unfair - particularly when the return is necessitated by a company error. The phrase "I will never shop here again" appears with striking frequency in reviews that mention restocking fees.

A particularly damaging pattern involves customers who paid for shipping insurance but were still denied refunds because the courier marked the item as delivered. This combination of automated decision-making and lack of human override mirrors the AI trust failures observed elsewhere - and it carries the same consequences.

The Hierarchy of Returns Friction: Consumer Sentiment Matrix

Exchanges (Size issues)	POSITIVE	Perceived as good service —quick resolution.
Standard refunds	NEUTRAL TO NEGATIVE	Speed and reliability critical; 3+ week waits are unacceptable
Store credit (in lieu of refund)	NEGATIVE	Customers often don't receive the email with the credit code.
Return fees / restocking fees	STRONGLY NEGATIVE	Viewed as penalizing the customer for a company error

There is a clear set of preferences for retail consumers

PEER INFLUENCE: REVIEWS BEAT MARKETING

In the US, reviews that mention peer influence carry an average star rating of approximately 2.0 stars - lower than the ~3.0 average for reviews that do not. This is because peer influence keywords in these markets go together with negative experiences - consumers who ignored reviews, who were attracted by social media advertising, and who subsequently experienced delivery/quality failures.

A repeated narrative is “I should have read the reviews.” Reviews are a decision-making tool consumers consult to mitigate the influence of brand marketing. US retailers that actively manage their review profiles are taking part in a consumer’s purchase decision as they make it.

PRICE VS. TRUST: WHEN VALUE BECOMES A LIABILITY

Value for money is the most consistently positive theme in the dataset, with reviews mentioning value or money averaging 4.39 stars. But a positive perception is reliant on the post-purchase experience. When a return failure occurs, perceived value disappears.

LOYALTY INTENT: A 3× STAR RATING GAP

Reviews containing positive loyalty keywords carry an average star rating nearly three times higher than those expressing negative loyalty intent. This gap is consistent across the US market, confirming that star ratings can be a proxy for customer lifetime value - and that failures driving 1-star reviews are destroying long-term revenue.

SHIPPING COMPLAINTS

Analysis of 37,117 fulfillment-related reviews reveals a hierarchy in shipping complaints. While delivery speed is the most frequently mentioned issue, it is lost packages that inflict the most reputational damage - scoring 0.9 to 1.0 stars lower than delivery speed complaints across all regions. For US retailers, a delayed package is frustrating; a lost package destroys trust.



Strategic fixes for US retail companies

These fixes represent the highest-leverage interventions available to US retail leaders looking to convert consumer trust into a competitive advantage.

1

REDESIGN THE RETURNS EXPERIENCE AS A LOYALTY TOOL

The 1.69-star penalty for returns mentions is the single largest destroyer of trust in US retail. Eliminate restocking fees for company errors, guarantee refunds to original payment methods within five business days, and invest in seamless exchange processes. A frictionless return is a loyalty investment, with a measurable ROI in repeat purchase rates.

2

DEPLOY AI FOR DISCOVERY, NOT FOR SUPPORT

AI excels at pre-purchase discovery and visualization, and does less well when used in after-purchase support. Invest in smart search, virtual try-on, and contextual recommendation. Ensure that AI interaction involved in after-purchase has a clear, low-friction escalation path to a human agent within a small number of clicks/messages.

3

FIX THE FULFILLMENT COMMUNICATION GAP

Lost packages are a communication failure. Proactive, real-time tracking updates, immediate response to lost package reports, and a no-questions-asked replacement policy for items marked delivered but not received, will reduce fulfillment-related negative reviews.

4

INVEST IN THE HIGH-END SEGMENT

With high-end retail growing 48% globally and showing consistent YoY improvement in star ratings (from 3.99 in 2023 to 4.29 in 2025), this segment represents a clear growth opportunity. US retailers should consider how to position quality, durability, and craftsmanship – even within mid-market categories – to capture the consumer shift away from fast fashion. This macro-shift also presents a massive differentiation opportunity for accessible, affordable mass retailers.

Strategic fixes for US retail companies

5

TREAT THE JANUARY RETURNS WINDOW AS A REVENUE OPPORTUNITY

January retains 82% of December's review volume - driven by the post-holiday returns and feedback cycle. US retailers that adequately staff customer service departments, streamline returns processing, and proactively communicate with customers during this period can convert a cost center into a loyalty-building practice that pays off in the form of positive reviews to be referenced by shoppers for the remainder of the year.

6

USE REVIEWS AS REAL-TIME INTELLIGENCE

Examples show that review volume spikes can validate the commercial impact of marketing investments. Equally, rising returns complaints, AI frustration themes, and discount code failures are early warning signals of operational issues that, if caught early, can be resolved before they compound into criticism.

7

CLOSE THE FEEDBACK LOOP ON EVERY REVIEW

Peer influence data show US consumers actively consult reviews before purchasing - and that negative reviews without responses confirm their worst fears. A systematic, empathetic, and personalized response to every negative review is not optional. It is an intervention in the consumer's purchase decision. Brands that respond well to 1-star reviews can convert critics into advocates.

8

FIX PROMOTIONAL CODE TECHNOLOGY

Discount and promotional code failures are a disproportionate source of brand damage in the US market. Investing in robust checkout technology that reliably applies promotional codes - particularly during high-traffic sale periods - will have an outsized positive impact on US review scores and conversion rates.

Conclusion: In US retail, trust is the transaction

The US retail consumer of 2026 is more informed, more vocal, and more demanding than at any previous point. They use peer reviews to override brand marketing. They punish return friction more than any other market. They embrace AI when it helps them discover products they love, and they abandon brands that deploy AI as a barrier to human support. They also reward quality, transparency, and reliability with a loyalty that is worth three times the star rating of a dissatisfied customer.

The data from Trustpilot's proprietary research is clear: retailers that will win in 2026 and beyond are those that treat every review as a signal, every return as a loyalty opportunity, and every AI deployment as a trust decision. The cost of inaction is measured in stars - which translate directly into revenue.

Trustpilot provides a foundation for this transparency by turning customer sentiment into the high-authority signals that both AI search and people look for. When consumers are looking to make informed purchase decisions, Trustpilot ensures they have everything they need to make the right choice.

[Book a demo](#)