

THE GREAT RETURNS RACE

BENCHMARK 2017
THE SECOND EDITION

Your ultimate guide
to international
return policies

ReBOUND
RESEARCH



200+ RETAILERS INSIDE...



 ReBOUND®

INTRODUCTION

Join us as we step into the shoes of shoppers from all over the world; your potential customers. We continue to measure the return policy through all the many touchpoints with a customer, from the moment they land on a retailer's website, right up until they receive the item and make the decision on whether to keep it or not. Your return policy is integral to this journey and not just as an afterthought if something doesn't fit. We've looked at 7 key steps along the way to better understand which retailers are paving the way.

If you follow these 7 steps, it's a sure-fire way to get ahead in 'The Great Returns Race'.

Are you ready...?

Get set... Go!

HAVE YOU BEEN KEEPING UP WITH
THE GREAT RETURNS RACE?



ReBOUND®

www.reboundreturns.com

www.thereturnsrevolution.com

FOREWORD

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I often used to feel that Returns were the forgotten part of retailing with many different approaches adopted across the retail sector. Speaking to Returns Managers - if there was one - within many of the country's retailers would provide you with many different perspectives on the area, from 'we haven't got a problem,' (there weren't many of these to be fair), through to, 'I am not sure of the size of the problems we are currently facing'.

In more recent times retailers do seem to be paying more attention to the number of returns they have and are 'more' aware of the scale of the problems they are facing across different product ranges. However, the number of resources can still be very small and the recovery rates on certain areas are often not as high as they could be.

Returns policies are a fundamental way of managing returns and deciding how products should be returned. However, if companies are not careful, a strictly executed returns policy can run counter to good customer service. The challenge is to have policies that protect the company, but are also fair to the customer and make them want to purchase from you time and again.

This latest issue of 'The Great Returns Race' looks at 7 key steps along the journey to managing returns more effectively. **I recommend the findings of this report to you and hope that it gives you much food for thought.**

Dr Jonathan Gorst

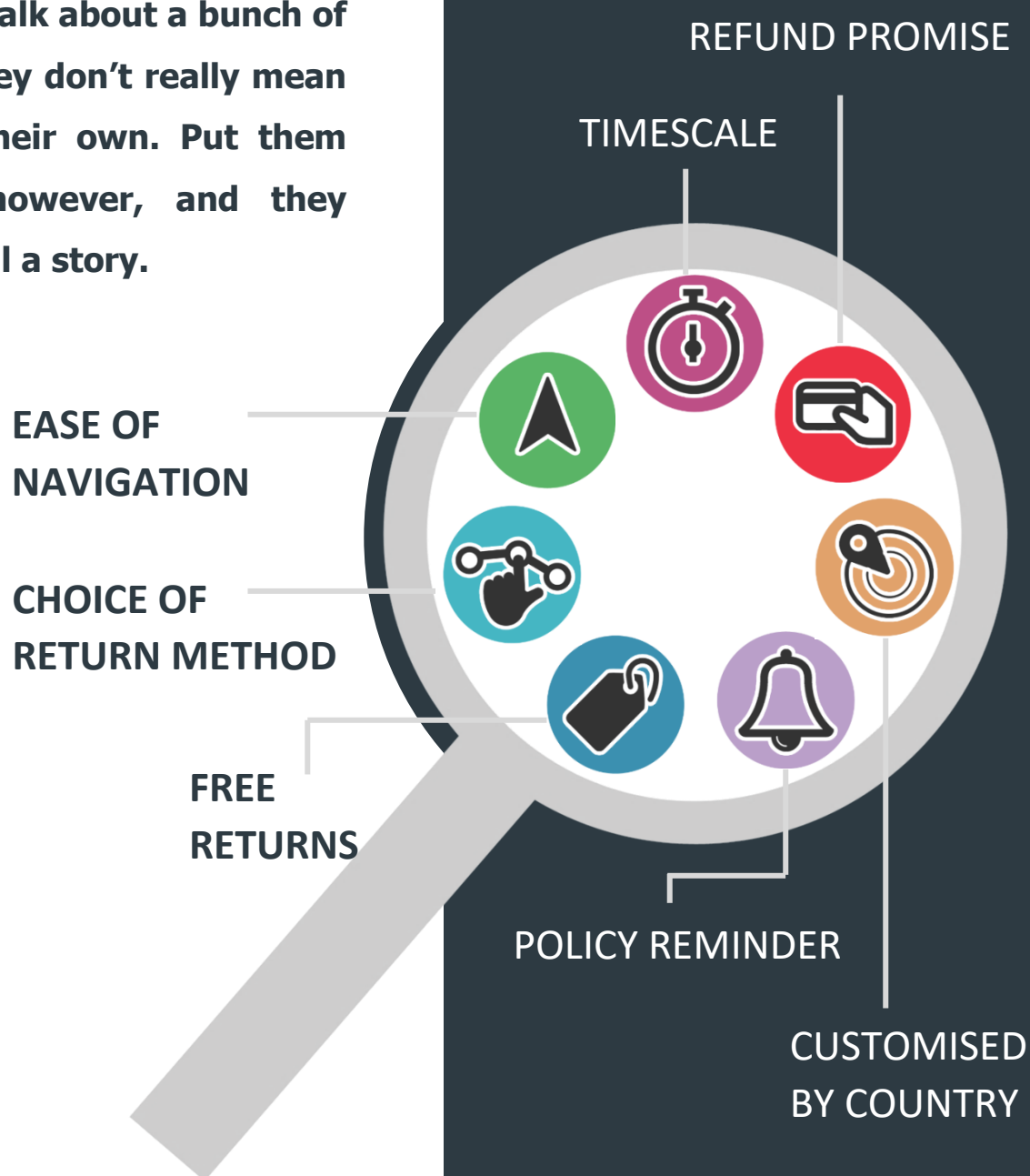


**Sheffield
Hallam
University**

WHAT HAVE WE MEASURED?

We've taken **7** core metrics

to assess the return offering of the top brands within the fashion sector. But **when you talk about a bunch of metrics, they don't really mean a lot on their own. Put them together however, and they begin to tell a story.**



KEY FINDINGS AT A GLANCE

➤ **7%** OF BRANDS NOW ADVERTISE **DIFFERENT RETURN PERIODS** TO ACCOUNT FOR **LONGER TRANSIT TIMES** IN MARKETS FURTHER AFIELD

➤ **17%** OF BRANDS STILL **DO NOT OFFER CHOICE OF LOCAL RETURN METHOD** TO THEIR CUSTOMERS.

➤ ON AVERAGE, IT TAKES **3 MOVES** TO NAVIGATE TO A BRAND'S RETURN POLICY ON A **DESKTOP**, **4 MOVES** ON A **MOBILE** AND **3 MOVES** ON A **TABLET** DEVICE.

➤ **18%** OF THE TOP GLOBAL FASHION BRANDS SIMPLY HAVE A **BLANKET RETURN POLICY** FOR THEIR INTERNATIONAL CUSTOMERS.

➤ ON AVERAGE, ACROSS THE **206 BRANDS** IT TAKES **10 DAYS** TO PROCESS A **REFUND**.



➤ **8%** OF BRANDS NOW OFFER **FREE RETURNS** TO ALL MARKETS **WORLDWIDE**.

➤ **39%** OF BRANDS STILL **DO NOT OFFER FREE RETURNS** IN ANY MARKET **GLOBALLY**.

➤ **30%** OF BRANDS USE RETURNS AS A **MARKETING TOOL** THROUGH A **PROMOTIONAL BANNER** ON THE HOMEPAGE.

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➤ For a [full methodology](#), take a look at the information provided on The Returns Revolution site to better understand how we have conducted the study.

METRIC 1

EASE OF NAVIGATION

How does the customer journey impact their return experience?



67%* of shoppers look at the returns policy before checking out.

How easy is it for your customers to locate your returns policy?

A customer is looking for the quickest route, so it can't be buried amongst pages and pages of information.

Consider what device the customer could be using. Will their journey begin on a mobile or tablet? That journey is likely to be different depending on the device used.

NAVIGATION LEADERBOARD

NAVIGATE
IN 1 MOVE



FlipFlop

Diesel

La Redoute

Lipsy

NAVIGATE
IN 2 MOVES



Adidas
Arco
ASOS
Bondara
Bravissimo
Camper
Cloggs
Cotswold Outdoor
Crocs
Dorothy Perkins
Ellis Brigham Mountain Sports
END.
Evans

Getthelabel.com
Go Outdoors
H&M
Harvery Nichols
Jimmy Choo
John Lewis
Joy
Karen Millen
Lands' End
MandM Direct
MatchesFashion.com
Moda in Pelle
Moss Bros.

Mulberry
Nike
Puma
Reiss
Rohan
Schuh
Surfdome
The Hut
Thomas Pink
Urban Industry
Vivienne Westwood
Wallis
White Stuff

Wiggle
Wynsors World of Shoes
YumiDirect
Zalando

NAVIGATE
IN 3 MOVES



Agent Provocateur
Aldo
Asics
Banana Republic
Bershka
Blacks
Boux Avenue
Burton
Calvin Klein
Charles Clinkard
Cotton Traders
Craghoppers
CycleSurgery
Debenhams
Decathlon
Dr.Martens
Dune London
EAST
Ecco
Espirit
Everything5pounds.com
Fat Face
Flannels

Foot Asylum
Forever 21
Fred Perry
French Connection
Gant
GAP
George at Asda
Gucci
House of Fraser
J Crew
JD Sports
Joe Browns
Joules
Kenzo
Kitbag.com
Lacoste
Laura Ashely
Liberty
Long Tail Sally
Louis Vuitton
Lovehoney
M&Co
M&S

Mamas & Papas
Mango
Massimo Dutti
Merlin Cycles
Millets
Monsoon
Mothercare
Mountain Warehouse
Mr Porter
Myprotein
Net-A-Porter
Office
Oliver Bonas
Orvis
Paul Smith
Peacocks
Pretty Green
PrettyLittleThing
Ralph Lauren
Rapha
Reebok
River Island
Route One

Selfridges
Size?
Snow + Rock
Sole
SportsShoes.com
Superdry
T.M.Lewin
Ted Baker
The Edinburgh Woolen Mill
The North Face
The Outnet
The White Company
Ugg Australia
Uniqlo
Urban Outfitters
Vans
Vente-Privée
Whistles
Zara

NAVIGATE
IN 4 MOVES



& Other Stories
Abercrombie
All Saints
Ann Summers
Armani
Blue Inc
Boden
Bonmarché
Burberry
Cath Kidston
Charles Tyrwhitt
Clarks
Coast
Crew Clothing

Deichmann
Farfetch
Fingleaves.com
Foot Locker
Freeman.com
Gabor
Hackett
Harrods
Hawes & Curtis
Hollister
Hotter
Jacamo
Jack & Jones

Jack Wills
Jacques Vert
Jaeger
JoJo Maman Bébé
Kurt Geiger
L.K.Bennett
Lyle & Scott
Mint Velvet
Miss Selfridge
New Look
Next
Oasis
Outdoor & Country

Pro-Direct
Pull & Bear
Quiz
QVC
Regatta Outdoor Clothing
Roman Originals
Simply Be
SportsDirect.com
Sweaty Betty
Topman
Victoria's Secret
Warehouse
Yours Clothing

NAVIGATE
IN 5+ MOVES



Anthropologie
BrandAlley
Boohoo
COS

DKNY
Free People
G-Star Raw
Hobbs London

Jigsaw
Missguided
Pavers
Phase Eight

Poetry Fashion
Radley
SecretSales

WHAT'S CHANGED SINCE THE LAST STUDY?



- On average, it takes **3 moves** to navigate to a brand's return policy on a desktop, **4 moves** on a mobile and **3 moves** on a tablet device.
- **Two brands** have come through the ranks since the previous edition with policies that customers can navigate to in **1 move**: **FlipFlop** and **Lipsy**. Both brands have reduced their overall average moves to their returns policy by **33%** since the first edition in 2017, to take the initial lead in the Great Returns Race.
- **45%** of UK fashion brands have an overall average of moves of **3** to their returns policy, compared to **43%** in the last edition.
- **Mobile navigation is still slower than desktop** as it takes five or more moves to navigate to the policy on 25% of websites, compared to just 10% on desktop.

ReBOUND ADVICE

Since 2016, there's been a 26% increase of UK shoppers buying on their mobile phones*. Therefore it is now more important than ever for customers to be able to access all areas of a brand's website, including their returns policy. Remember that over 60% of customers look at your returns policy before making a purchase**, so don't forget returns when you're focusing on mobile optimisation!

*Centre for Retail Research study

**TrueShip study

METRIC 2

CUSTOMISED BY COUNTRY




Is the returns policy customised to suit each international market?



When the customer lands on the return policy, make sure they are presented with local information which is relevant to the country they are returning from.

It's no good having a return policy in local language which when translated talks about the UK process. The information needs to be tailored by each international market for a familiar and personable experience.

CUSTOMISED BY COUNTRY - LEADERBOARD

TAILORED POLICY WORLDWIDE		ASOS	Matchesfashion.com			
10+ TAILORED POLICIES		Adidas Decathlon	H&M Karen Millen	Mango Paul Smith	Reebok	
5+ TAILORED POLICIES		Armani Asics Boohoo	Deichmann La Redoute	Louis Vuitton M&S	Missguided Wiggle	
2 TAILORED POLICIES		Banana Republic Bershka Brand Alley Clarks Crocs Diesel Dr.Martens Espirit	Evans Forever 21 Free People GAP Lacoste Laura Ashley Long Tall Sally New Look	Next Nike Oasis PrettyLittleThing Puma QVC Ted Baker Tommy Hilfiger	Topman Topshop Wallis Warehouse Zalando	
1 TAILORED POLICY		Agent Provocateur Aldo All Saints Ann Summers Anthropologie Blue Inc Boden Bondara Bonmarché Boux Avenue Bravissimo Burberry Burton Charles Clinkard Charles Tyrwhitt Cloggs Coast Cotswold Outdoor Cotton Traders Debenhams DKNY Dorothy Perkins Dune London EAST Ellis Brigham Mountain Sports END. Farfetch Fat Face Fingleaves.com FlipFlop	Foot Asylum Foot Locker Fred Perry French Connection Getthelabel.com G-Star Raw Hackett Harrods Harvey Nichols Hawes & Curtis Hobbs London Hotter House of Fraser Jack & Jones Jack Wills Jacques Vert Jaeger JD Sports Jigsaw Jimmy Choo Joe Browns John Lewis JoJo Maman Bébé Joules Joy Kenzo Kitbag.com Kurt Geiger L.K.Bennett Liberty	Lipsy Lovehoney Lyle & Scott M&Co MandM Direct Massimo Dutti MatchesFashion.com Merlin Cycles Miss Selfridge Monsoon Moss Bros. Mothercare Mountain Warehouse Mr Porter Mulberry Net-A-Porter Office Oliver Bonas Outdoor & Country Peacocks Phase Eight Poetry Fashion Pretty Green Pull & Bear Quiz Radley Ralph Lauren Rapha Rohan Roman Originals	Route One Selfridges Simply Be Size? SportsShoes.com Superdry Surfdome Sweaty Betty T.M.Lewin The Edinburgh Woolen Mill The North Face The Outnet The White Company Thomas Pink Toast Ugg Australia Uniqlo Urban Industry Urban Outfitters Vans Vente-Privée Victoria's Secret Whistles White Stuff Wynsors World of Shoes Yours Clothing YumiDirect Zara	
BLANKET POLICY FOR ALL INTERNATIONAL MARKETS (NO TAILORED POLICIES)		& Other Stories Abercrombie & Fitch Arco Blacks Camper Cath Kidston COS Craghoppers Crew Clothing CycleSurgery	Ecco Everything5pounds.com Flannels Freeman.com Gabor Gant George at Asda Go Outdoors Gucci Hollister	Jacamo Lands' End Mamas & Papas Millets Mint Velvet Moda in Pelle Myprotein Orvis Pavers Pro-Direct	Regatta Outdoor Clothing Schuh SecretSales Snow + Rock Sole SportsDirect.com The Hut Vivienne Westwood	

WHAT'S CHANGED SINCE THE LAST STUDY?



- **Matchesfashion.com** and **ASOS** still lead with a tailored returns policy for each country worldwide (followed by Paul Smith with 71 countries).
- **18%** of the top global fashion brands simply have a **blanket return policy** for their International customers without distinguishing between different markets; which is 5% less than the first edition of 2017.
- Looking at the brands that only tailor their returns message for one country, **86%** of these **tailor this message to the UK alone**.
- **30%** of brands now tailor the return message for US customers; which is 6% less than the previous edition.
- **43%** of brands offer **tailored policies** for **3 or more countries**.

HOW CAN ReBOUND HELP?

It's tough to change your returns advice to suit an international audience without having something different to say.

ReBOUND can help to develop local approaches for your customers across the world because we've already integrated with local carriers – giving you something to shout about instantly.

Find out more at www.reboundreturns.com or get in touch info@reboundreturns.com.

METRIC 3

TIMESCALE







How long does the customer have to return their product(s)?



Yes it's mandatory, but are 14 days enough for the modern consumer?

When worries about returning goods are cited as the biggest barrier to cross-border trade, have you thought about promoting a longer timeframe to ease off the pressure?

CUSTOMISED BY COUNTRY - LEADERBOARD

60+ DAYS 	Adidas Aldo Anthropologie Boden Bondara Calvin Klein Charles Tyrwhitt	Clarks Crocs Decathlon George at Asda Hawes & Curtis Hollister Hotter	J Crew John Lewis Lands' End Lovehoney Orvis Rapha Reebok	Route One Schuh Sole Tommy Hilfiger Victoria's Secret Wiggle Zalando
31+ DAYS (or 1 month+) 	Banana Republic Charles Clinkard	Crew Clothing Figueaves.com	Gabor GAP	Hobbs London M&S
30+ DAYS 	Abercrombie & Fitch Arco Armani Asics Bershka BrandAlley Camper Cotswold Outdoor CycleSurgery DKNY Dorothy Perkins Dr.Martens Ecco Fat Face Forever 21	Free People Gant Go Outdoors H&M Jack & Jones Jigsaw Jimmy Choo La Redoute Lacoste Long Tall Sally Mamas & Papas Mango Massimo Dutti Merlin Cycles Monsoon	Moss Bros. Mothercare Mountain Warehouse Nike Oasis Oliver Bonas Poetry Fashion Pull & Bear Puma QVC Radley Ralph Lauren Roman Originals Simply Be Snow+Rock	Surfdome Sweaty Betty T.M.Lewin The North Face Topman Topshop Ugg Australia Urban Outfitters Vans Warehouse White Stuff Wynsors World of Shoes Zara
28+ DAYS 	Ann Summers ASOS Blacks Bonmarché Boux Avenue Bravissimo Cath Kidston Cloggs Coast Craghoppers Debenhams Deichmann Dune London EAST	FlipFlop Foot Locker Fred Perry Hackett House of Fraser Jack Willis Jacques Vert JoJo Maman Bébé Joules L.K.Bennett Laura Ashley Lyle & Scott M&Co MandM Direct	MatchesFashion.com Mint Velvet Missguided Moda in Pelle Mr Porter Mulberry Net-A-Porter New Look Next Office Outdoor & Country Paul Smith Peacocks	Phase Eight PrettyLittleThing Pro-Direct Reiss Selfridges Size? Superdry The Edinburgh Woollen Mill The Outnet Thomas Pink Uniqlo Urban Industry Whistles
21+ DAYS 	Ellis Brigham Mountain Sports Getthelabel.com	Lipsy Yours Clothing		
14 DAYS 	& Other Stories Agent Provocateur All Saints Blue Inc Boohoo Burberry Burton COS Cotton Traders Diesel END. Espirit Evans Everything5pounds.com	Farfetch Flannels Foot Asylum Freemans.com French Connection G-Star Raw Gucci Harrods Harvey Nichols Jacamo Jaeger JD Sports Joe Browns Joy	Karen Millen Kenzo Kitbag.com Kurt Geiger Liberty Louis Vuitton Millecs Miss Selfridge Myprotein Pavers Pretty Green Quiz Regatta Outdoor Clothing River Island	Rohan SecretSales SportsDirect.com SportsShoes.com Ted Baker The Hut The White Company Toast Vente-Privée Vivienne Westwood Wallis YumiDirect

WHAT'S CHANGED SINCE THE LAST STUDY?



- Hollister, Orvis, and Lands' End continue to offer unbeatable unlimited returns to their customers worldwide.
- Whereas Rohan has slashed their returns timeframe from offering an unlimited time period to return items, to just the standard 14 days.
- 7% of brands now advertise different return periods to account for longer transit times in markets further afield, which is a slight increase from 2% in the last edition.
- Anthropologie has upped their timeframe from 30 days in the last edition, to 90 days for their customers to return their items.

HOW CAN ReBOUND HELP?

If you're worried about extending your returns timeframe because you think customers might exploit this, never fear! The ReBOUND platform allows you to control this time window with an RMA process which can be linked to order date, giving your help centre greater control of legitimate return requests beyond the allocated grace period.

Find out more about the ReBOUND solution at www.reboundreturns.com or get in touch info@reboundreturns.com.

METRIC 4






FREE RETURNS

How much does it cost your customers to return items?



A FREE return policy can massively boost sales by up to 357%*. This may even be more for your own brand...

FREE RETURNS - LEADERBOARD

FREE RETURNS WORLDWIDE		Burberry Farfetch G-Star Raw Gucci	Kenzo Massimo Dutti Mulberry Net-A-Porter	Pull & Bear Puma Reebok Selfridges	The Outnet Vans Zara
FREE RETURNS IN 20+ COUNTRIES		Agent Provocateur ASOS	Bershka Calvin Klein	Espirit Jimmy Choo	Paul Smith Reiss
FREE RETURNS IN 10+ COUNTRIES		Adidas Asics Charles Tyrwhitt	COS Deichmann Ecco	Lacoste Mint Velvet	Nike Zalando
FREE RETURNS IN 5+ COUNTRIES		Clarks Diesel Dune London	Foot Locker Gant Karen Millen	MatchesFashion.com Oasis UGG Australia	
FREE RETURNS IN 1+ COUNTRIES		&Other Stories Aldo All Saints Ann Summers Banana Republic Bondara Boohoo Boux Avenue Bravissimo Burton Camper Cloggs Coast Croc's Debenhams Decathlon DKNY Dorothy Perkins Dr.Martens EAST END. Evans Fat Face	Figleaves.com FlipFlop Free People Freemans.com French Connection Gap George at Asda H&M Hackett Harrods Harvey Nichols Hawes & Curtis Hobbs London Hotter House of Fraser Jacamo Jacques Vert JD Sports Jigsaw Joe Browns John Lewis Joules Kurt Geiger	L.K.Bennett La Redoute Laura Ashley Love Honey Lyle & Scott M&Co M&S Mango Miss Selfridge Missguided Monsoon Moss Bros. Mountain Warehouse Mr Porter New Look Next Oliver Bonas Pavers Phase Eight Poetry Fashion Pretty Green PrettyLittleThing	Quiz Radley River Island Simply Be Size? Superdry Surfdome Sweaty Betty T.M.Lewin Thomas Pink Topman Topshop Uniqlo Urban Outfitters Victoria's Secret Wallis Warehouse White Stuff Wiggle Yours Clothing YumiDirect
NO FREE RETURNS		Abercrombie & Fitch Anthropologie Arco Armani Blacks Blue Inc Boden Bonmarché Brand Alley Cath Kidston Charles Clinkard Cotswold Outdoor Cotton Traders Craghoppers Crew Clothing Cycle Surgery Ellis Brigham Mountain Sports Everything5pounds.com Flannels Foot Asylum	Forever 21 Fred Perry Gabor Getthelabel.com Go Outdoors Hollister J Crew Jack & Jones Jaeger JoJo Maman Bébé Joy Kitbag.com Lands' End Liberty Lipsy Long Tall Sally Mamas & Papas MandM Direct Milleto Moda in Pelle	Mothercare Myprotein Office Orvis Outdoor & Country Peacocks Pro-Direct QVC Ralph Lauren Rapha Regetta Outdoor Clothing Rohan Roman Originals Route One Schuh SecretSales Snow + Rock Sole SportsDirect.com SportsShoes.com	Ted Baker The Edinburgh Woolen Mill The Hut The North Face The White Company Toast Tommy Hilfiger Urban Industry Vente-Privée Vivienne Westwood Whistles Wynsors World of Shoes

WHAT'S CHANGED SINCE THE LAST STUDY?



- The number of brands offering free returns in at least one international market has taken a steep decline from 55% in the first edition to just 28% in the second edition.
- 8% of brands offer free returns to all markets worldwide.
- 53% of brands offer free returns in the UK, 23% in Germany, 21% in Ireland and 21% in the USA.
- 39% of brands still do not offer free returns in any market globally.
- 10% (21) of brands have stopped offering free returns to UK since the last edition.
- 12% (24) of brands have stopped offering free returns to Ireland since the last edition.

HOW CAN ReBOUND HELP?

With ReBOUND, you're able to trial a free returns policy, rather than committing to a complete policy overhaul. Take advantage of our voucher codes scheme to offer customers a one-off free return. Try linking it to a promotion, or as a tool for your customer help centre to boost customer satisfaction.

Find out more about the ReBOUND solution at www.reboundreturns.com or get in touch info@reboundreturns.com.

METRIC 5

POLICY REMINDERS






Do you promote your returns policy?



It is important to remind and reassure customers of your return policy at each touchpoint of the journey.

We measure this by looking at the product page, basket stage and at checkout. Are you making it easy for customers to get the answers to their returns queries, or hiding away?

POLICY REMINDER - LEADERBOARD

4 REMINDERS		Agent Provocateur ASOS Calvin Klein Dr.Martens	Gucci La Redoute MatchesFashion.com White Stuff		
3 REMINDERS		Brand Alley Burberry Cotswold Outdoor Deichmann Ecco	END. Farfetch H&M Hobbs London Jack & Jones	Jimmy Choo Lacoste Liberty Moss Bros. Nike	Phase Eight Route One Topshop Whistles
2 REMINDERS		& Other Stories Adidas Ann Summers Armani Banana Republic Bershka Boden Bonmarché Boohoo Charles Clinkard Cloggs Coast COS Cotton Traders	CycleSurgery Decathlon Diesel Dorothy Perkins Fat Face FlipFlop Fred Perry French Connection Gant GAP Getthelabel.com G-Star Raw Harrods Jacques Vert	Jaeger JD Sport Joe Browns John Lewis Karen Millen Kenzo Merlin Cycles Miss Selfridge Mr Porter Oasis Outdoor & Country Pavers Puma Reiss	River Island Schuh Snow + Rock SportsShoes.com Superdry Sweaty Betty The Hut Toast Tommy Hilfiger Ugg Australia Wiggle YumiDirect Zalando
1 REMINDER		Aldo All Saints Anthropologie Arco Asics Blue Inc Boux Avenue Bravissimo Burton Camper Charles Tyrwhitt Clarks Craghoppers Crew Clothing Crocs Debenhams EAST Ellis Brigham Mountain Sports Espirit Evans Figleaves.com	Flannels Foot Asylum Freemans.com Gabor George at Asda Go Outdoors Harvey Nichols Hotter House of Fraser Jacamo Jack Wills Jigsaw JoJo Maman Bébé Joules Joy Kurt Geiger L.K.Bennett Lands' End Laura Ashley Lipsy	Long Tall Sally M&Co M&S MandM Direct Mango Massimo Dutti Millets Mint Velvet Missguided Moda in Pelle Monsoon Mountain Warehouse Mulberry New Look Office Orvis Paul Smith Pretty Green PrettyLittleThing Pull & Bear	Quiz Radley Regatta Outdoor Clothing Roman Originals Selfridges Simply Be Size? SportsDirect.com Surfdome T.M.Lewin Ted Baker The Outnet Topman Uniqlo Urban Industry Vans Victoria's Secret Vivienne Westwood Warehouse Wynsors World of Shoes
NO REMINDERS		Abercrombie & Fitch Blacks Bondara Cath Kidston DKNY Dune London Everything5pounds.com Foot Locker Forever 21 Hackett	Hawes & Curtis Hollister J Crew Kitbag.com Louis Vuitton Lovehoney Lyle & Scott Mamas & Papas Myprotein Net-A-Porter	Next Peacocks Poetry Fashion Pro-Direct QVC Ralph Lauren Rapha Reebok Rohan SecretSales	Sole The Edinburgh Woolen Mill The North Face The White Company Thomas Pink Urban Outfitters Vente-Privee Wallis Yours Clothing Zara

WHAT'S CHANGED SINCE THE LAST STUDY?



- 30% of brands use returns as a marketing tool through a promotional banner on the homepage.
- Just 6% (12) of brands are promoting their returns policy at all three stages (Product page, Basket page and Checkout page), and 8 of these brands also use a promotional banner on their homepage.
- 23% of the top fashion brands do not remind customers of their returns policy at any of the three key stages of purchase compared to 21% in the previous edition.
- 67% of brands promote the returns policy within each product page. 27% promote returns in the basket stage, and just 13% of brands reinforced the message at checkout stage.

ReBOUND ADVICE

Only 13% (27) of brands reminded customers about the ease of return at the checkout stage. This is where most brands came up short in this section, which is surprising as this is the last stage of the purchasing process.

Don't assume that because a shopper has reached to the checkout stage that it's a done-deal. Utilize each touch-point to promote friction-less returns.

METRIC 6

REFUND PROMISE

How fast do you process refunds?



It's not unusual that returns and refunds are the top reason for customers contacting your help centre.

Customers want to know how fast you'll credit their account once they've sent it back, so don't forget to make this message clear. If you can refund locally instead of waiting for items to arrive all the way back at your distribution centre then this will make your international customers happier.

REFUND PROMISE - LEADERBOARD

< 3 DAYS
UPON RECEIPT



ASOS
BrandAlley
CycleSurgery
Debenhams
DKNY

Dorothy Perkins
EAST
Ellis Brigham Mountain Sports
END.
FlipFlop

JD Sports
Joules
Lands' End
Moss Bros.
Next

Pavers
Schuh
Snow + Rock
Sweaty Betty
The Hut

< 5 DAYS
UPON RECEIPT



Abercrombie & Fitch
Boohoo
Bravissimo
Cloggs
Coast
Cotswold Outdoor
Cotton Traders
Crew Clothing
Diesel
Ecco
Espirit
Evans
Everything5pounds.com
Figleaves.com

Foot Asylum
Fred Perry
Getthelabel.com
Go Outdoors
G-Star Raw
Hackett
Harrods
Jacques Vert
Jaeger
Karen Millen
Lacoste
Long Tall Sally
M&S
MandM Direct

Millecs
Miss Selfridge
Missguided
Moda in Pelle
Myprotein
New Look
Nike
Orvis
Pretty Green
Pro-Direct
Puma
Route One
Selfridges
Size?

SportsShoes.com
T.M.Lewin
Ted Baker
The North Face
The White Company
Tommy Hilfiger
Topman
Topshop
Ugg Australia
Urban Industry
Vivienne Westwood
Wallis
Yours Clothing

< 10 DAYS
UPON RECEIPT



Armani
Asics
Boux Avenue
Burberry
Calvin Klein
Camper
Cath Kidston
Charles Tyrwhitt
COS
Cros

Decathlon
Dr.Martens
Free People
French Connection
Gant
Harvey Nichols
Hawes & Curtis
Jack Wills
Jimmy Choo

La Redoute
Lipsy
Mango
MatchesFashion.com
Mint Velvet
Mr Porter
Mulberry
Net-A-Porter
Office

Quiz
QVC
Superdry
Surfdome
Toast
Warehouse
Whistles
YumiDirect

< 14 DAYS
UPON RECEIPT



Agent Provocateur
Anthropologie
Blacks
Bondara
Clarks
Craghoppers
Deichmann
Dune London
Farfetch
Fat Face
Foot Locker
Forever 21
Freemans.com

Gucci
Hobbs London
Hotter
House of Fraser
Jack & Jones
Jigsaw
Joe Browns
John Lewis
JoJo Maman Bébé
Joy
Kenzo
Kitbag.com
Kurt Geiger

L.K.Bennett
Laura Ashley
Liberty
Louis Vuitton
M&Co
Mamas & Papas
Merlin Cycles
Monsoon
Mountain Warehouse
Oasis
Peacocks
Phase Eight
PrettyLittle Thing

Radley
Reebok
Regatta Outdoor Clothing
River Island
Roman Originals
Simply Be
SportsDirect.com
The Outnet
Uniqlo
White Stuff
Wiggle
Zalando

< 30 DAYS
UPON RECEIPT



Flannels

Lyle & Scott

Mothercare

SecretSales

GAP

NO CLEAR
REFUND
TIME ADVISED



& Other Stories
Arco
Banana Republic
Bershka
Blue Inc
Boden
Bonmarché
Charles Clinkard
Gabor

George at Asda
H&M
Hollisater
Jacamo
Lovehoney
Massimo Dutti
Oliver Bonas
Outdoor & Country

Paul Smith
Poetry Fashion
Pull & Bear
Ralph Lauren
Rapha
Reiss
Rohan
Sole

The Edinburgh Woolen Mill
Thomas Pink
Urban Outfitters
Vans
Vente-Privée
Victoria's Secret
Wynsors World of Shoes
Zara

WHAT'S CHANGED SINCE THE LAST STUDY?



- 17% of brands still **don't state their refund promise** anywhere on their site (3% less than last quarter).
- 10% of brands claim to process refunds **within 3 days**.
- 27% of brands claim to take **more than 14 days to process a customer's refund**, compared to 19% in previous edition.
- On average, across the 206 brands it takes **10 days to process a refund**.

HOW CAN ReBOUND HELP?

Want to speed up the refund process? How about refunding locally instead? Our consolidation approach means you can refund customers when the parcel is confirmed at our local hub. We can also inspect parcel contents to prompt your refund process if you're worried about fraudulent returns.

Find out more at www.reboundreturns.com or get in touch info@reboundreturns.com.

METRIC 7

CHOICE OF RETURN METHOD






Are customers given a choice of how to send their items back?



The one metric which really comes into play post-purchase is the choice of return method, when the customer receives the items, tries them on and for whatever reason wants to return them and starts to wonder “how”?

Offer your customers a clear choice of local return methods. Whether it is by facilitating access to a tracked postal label, offering returns via parcel lockers, parcelshops, home courier collection, or returns in-store, give the customer more variety through local, convenient options.

RETURN METHODS - LEADERBOARD

20+ RETURN METHODS		Adidas	ASOS	Bershka	Reebok
5 RETURN METHODS OFFERED		Agent Provocateur Armani Banana Republic Clarks Decathlon	Diesel Ellis Brigham Mountain Sports H&M John Lewis Karen Millen	La Redoute Missguided PrettyLittleThing River Island Tommy Hilfiger	Wiggle Zalando
3 RETURN METHODS OFFERED		Aldo Boohoo Burton Calvin Klein Charles Clinkard Charles Tyrwhitt Coast Debenhams Deichmann Dune London Espirit Foot Asylum Forever 21	French Connection Gant GAP Hackett Hollister Hotter J Crew Joe Browns Laura Ashley Liberty Long Tall Sally Louis Vuitton	M&Co M&S Mango Massimo Dutti Mint Velvet Moss Bros. Mr Porter Net-A-Porter New Look Next Oasis Office	Puma QVC Ralph Lauren Selfridges Simply Be Surfdome The White Company Ugg Australia Urban Outfitters Warehouse Yours Clothing Zara
2 RETURN METHODS OFFERED		Abercrombie & Fitch Blacks Blue Inc Brand Alley Burberry Cloggs Cotton Traders Crew Clothing Cycle Surgery Dorothy Perkins Dr.Martens END. Farfetch Fat Face	Foot Locker Fred Perry Freemans.com George at Asda Getthelabel.com G-Star Raw Hobbs London House of Fraser Jacamo Jacques Vert JD Sports Jimmy Choo Joules Kenzo	L.K.Bennett Lands' End MandM Direct Millets Miss Selfridge Mountain Warehouse Mulberry Orvis Paul Smith Pavers Poetry Fashion Pull & Bear Quiz	Radley Regetta Outdoor Clothing Schuh Snow + Rock Sole SportsShoes.com Ted Baker Topman Topshop Uniqlo Vans Whistles
1 RETURN METHOD OFFERED		Ann Summers Anthropologie Arco Asics Boden Bondara Bonmarché Boux Avenue Bravissimo Camper Cotswold Outdoor Craghopper EAST	Ecco Evans Flannels Gabor Go Outdoors Harrods Harvey Nichols Jack & Jones Jack Wills Jigsaw JoJo Maman Bébé Kitbag.com Kurt Geiger	Lacoste Lipsy Lyle & Scott Mamas & Papas MatchesFashion.com Moda in Pelle Mothercare Peacocks Phase Eight Rapha Rohan SecretSales	Size? SportsDirect.com Superdry T.M.Lewin The Edinburgh Woolen Mill The Outnet Toast Victoria's Secret Vivienne Westwood White Stuff Wynsors World of Shoes
NO RETURN METHODS OFFERED (BEYOND DISPLAYING UK ADDRESS)		& Other Stories All Saints Cath Kidston COS Crocs DKNY Everything5pounds.com Fingleaves.com FlipFlop	Free People Gucci Hawes & Curtis Jaeger Joy Love Honey Merlin Cycles Monsoon	Myprotein Oliver Bonas Outdoor & Country Pretty Green Pro-Direct Reiss Roman Originals Route One	Sweaty Betty The Hut The North Face Thomas Pink Urban Industry Vente-Prive Wallis YumiDirect

WHAT'S CHANGED SINCE THE LAST STUDY?



- 83% of brands now offer a choice of local return options in at least one market globally, which is a 6% decrease since the first edition of 2017.
- 78% of brands offer a choice of return method in the UK. Of these, 37% of brands offer a collect+ option, 15% offer a MyHermes drop-off point, 8% offer a Doddle drop-off point and 3% offer the AsdaToYou service.
- The number of brands offering parcel lockers as a local way to return now stands at 2% (5 brands).
- Since the last edition, there has been a change in the most popular return options amongst the brands. In the second edition of 2017, parcel shops (58%) were the most popular, followed by return to a local store (57%) and courier collection (27%).
- 38% of brands do not offer multiple return options for their customers globally.
- 13% (26) of brands offer a choice of return method in the USA.

HOW CAN ReBOUND HELP?

ReBOUND is already integrated with carriers from all over the world giving you and your shoppers access to a choice of local return methods. Take advantage of these existing relationships by plugging into one IT platform.

Find out more about the at www.reboundreturns.com or get in touch info@reboundreturns.com.

OVERALL RESULTS

**Hopefully that proves there's
more to a return policy than
meets the eye.**

So how does all that stack up?



OVERALL LEADERBOARD

LEADERS 60% +		Adidas ASOS Calvin Klein Decathlon	Jimmy Choo Karen Millen La Redoute Moss Bros.	Mulberry Nike Puma Reebok	Tommy Hilfiger Wiggle Zalando
RUNNERS UP 50% +		Agent Provocateur Aldo Armani Asics Bershka Charles Trywhitt	Clarks Deichmann Dorothy Perkins Dr.Martens Ecco Espirit	H&M John Lewis Lacoste Lands' End M&S Mango	MatchesFashion.com Schuh Selfridges Topshop Ugg Australia
CHALLENGERS 40% +		Banana Republic Bondara Boohoo BrandAlley Bravissimo Burberry Camper Charles Clinkard Cloggs Coast Cotswold Outdoor Crew Clothing Crocs Debenhams EAST Ellis Brigham Mountain Sports END. Evans Farfetch	Fat Face Figleaves.com FlipFlop Fred Perry French Connection GAP Gant Getthelabel.com Go Outdoors G-Star Raw Gucci Hobbs London Hotter Jacques Vert JD Sports Joules Kenzo Laura Ashley	Liberty Long Tall Sally Louis Vuitton M&Co MandM Direct Massimo Dutti Mint Velvet Missguided Mountain Warehouse Mr Porter Net-A-Porter New Look Next Oasis Office Orvis Paul Smith PrettyLittleThing	Pull & Bear Reiss River Island Route One Simply Be Size? Snow + Rock Superdry Surfdome Sweaty Betty T.M.Lewin The Outnet Topman Vans Warehouse Whistles White Stuff Zara
PICKING UP PACE 30% +		Abercrombie & Fitch Ann Summers Anthropologie Boux Avenue Burton Cotton Traders CycleSurgery DKNY Foot Asylum Foot Locker Forever 21 George at Asda Hackett	Harrods Harvey Nichols Hawes & Curtis House of Fraser J Crew Jack & Jones Jack Wills Joe Browns L.K.Bennett Lipsy Merlin Cycles Millets Miss Selfridge	Moda in Pelle Monsoon Mothercare Pavers Phase Eight Pretty Green Quiz QVC Radley Regatta Outdoor Clothing SecretSales SportsShoes.com Ted Baker	The Hut The North Face The White Company Toast Uniqlo Urban Industry Urban Outfitters Victoria's Secret Vivienne Westwood Wallis Wynsors World of Shoes Yours Clothing YumiDirect
LAGGING BEHIND 20% +		All Saints Arco Blacks Blue Inc Boden Bonmarché Cath Kidston COS Craghoppers Everything5pounds.com	Flannels Freemans.com Gabor Hollister Jacamo Jaeger Jigsaw JoJo Maman Bébé Joy Kitbag.com	Kurt Geiger Lovehoney Lyle & Scott Mamas & Papas Myprotein Oliver Bonas Outdoor & Country Peacocks Poetry Fashion Pro-Direct	Ralph Lauren Rapha Sole SportsDirect.com The Edinburgh Woolen Mill Thomas Pink
ON THE STARTING GRID 10% +		& Other Stories	Rohan	Vente-Privée	

SPOTLIGHT ON THE LEADERS

ReBOUND INDEX VALUE:

ASOS	85.71%
Adidas	77.14%
Calvin Klein	68.57%
La Redoute	68.57%
Puma	68.57%
Reebok	68.57%
Decathlon	65.71%
Zalando	65.71%
Wiggle	62.86%
Jimmy Choo	60.00%
Karen Millen	60.00%
Moss Bros.	60.00%
Mulberry	60.00%
Nike	60.00%
Tommy Hilfiger	60.00%

There are now 15 brands sharing 'leading' status in the Returns Race! The most consistent players have been ASOS, Adidas and Puma, but we also see 6 brands that are new to the leaders category.

CONCLUSION

From generous free returns, to unlimited timeframes, we have seen some incredible offerings in the world of returns. The Great Returns Race continues to surprise us and this iteration is a stand-out study for a number of reasons...

The most noticeable trend to emerge from this study is the reduction of free returns that are being offered to the UK, Ireland, Germany, and USA. For example, since the previous study at the beginning of 2017, 12% of brands have stopped offering free returns to Ireland and 10% have stopped offering free returns to the UK.

This is actually the last of it's kind as we're changing track slightly. But never fear, the race will live on. We're just focusing the report into tighter product sectors for the next report rather than the large spread of 200+ brands from a mix of fashion, footwear, sportswear etc.

It's therefore significant that for the last of it's kind, we've seen a Returns Race first...6-time Returns Race winner ASOS continues to progress and impress. They've scored the highest ReBOUND Index Value we have ever seen: 85.71%, so ASOS continue to raise the bar for returns experiences globally.

That's it for 2017 folks. We look forward to shaping things up early next year in the next report on our quest to revolutionise returns.

If you would like to get ahead of the game to ensure you move up in 'The Great Returns Race', then get in touch and we'll share some insights into how ReBOUND can support your shoppers' return experience worldwide.

Join in the discussion online
through Twitter

@ReBOUNDReturns



Or send us your comments to:
research@reboundreturns.com



www.reboundreturns.com

www.thereturnsrevolution.com