

THE GREAT RETURNS RACE

ReBOUND
RESEARCH



Q1 2017

BENCHMARK ON INTERNATIONAL RETURN POLICIES

NOW INCLUDING UK

 ReBOUND®

INTRODUCTION

After the success of last year's benchmark, this year we are raising the stakes...

Throughout 2016, we looked at a strong segment of brands from the IRUK's Top 500 database. The brands featured in this study were classified as retailers of UK origin which sell cross-border. From this moment on, we are also benchmarking international brands, as well as looking at their UK domestic propositions too. This means that we kick-start 2017 by looking at over 200 fashion brands, so this study is the most comprehensive yet!

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!

'The Great Returns Race' is back for the second year running.

Look back at 2016:



ReBOUND®

www.reboundreturns.com

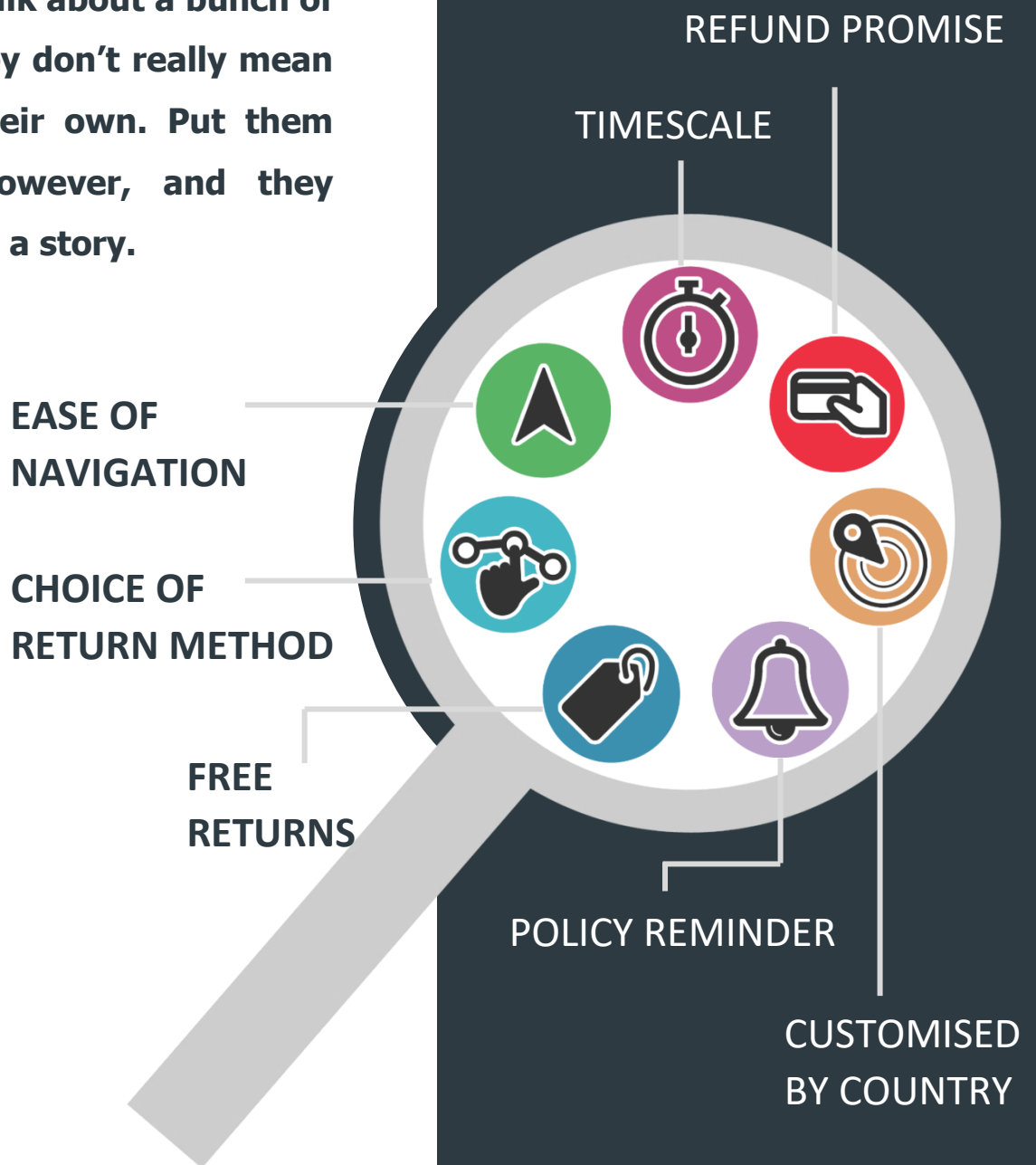
www.thereturnsrevolution.com



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

9% OF BRANDS NOW OFFER **FREE RETURNS WORLDWIDE.**

12% OF BRANDS STILL **DO NOT OFFER CHOICE OF LOCAL RETURN METHOD** TO THEIR CUSTOMERS.

78% OF BRANDS OFFER **FREE RETURNS IN THE UK.**

55% OFFER FREE RETURNS IN AT LEAST ONE **INTERNATIONAL MARKET.**

IN THE **UK**, **29%** OFFER **COLLECT+**, **12%** OFFER **MYHERMES** DROP-OFF POINTS, **6%** OFFER A **DODDLE** DROP-OFF POINT AND **4%** OFFER **ASDATOYOU.**

29% OF BRANDS **PROMOTE THEIR RETURN POLICY.**

20% OF BRANDS **DO NOT ADVERTISE THEIR REFUND PROMISE** ANYWHERE ON THEIR SITE.

(A RISE FROM **16%** LAST QUARTER)

 **ReBOUND®**

CONTENTS

1-3	METRIC 1: EASE OF NAVIGATION
4-6	METRIC 2: CUSTOMISED BY COUNTRY
7-9	METRIC 3: TIMESCALE
10-12	METRIC 4: FREE RETURNS
13-15	METRIC 5: POLICY REMINDERS
16-18	METRIC 6: REFUND PROMISE
19-21	METRIC 7: CHOICE OF RETURN METHOD
22-23	THE OVERALL RESULTS
24-27	SPOTLIGHT ON THE LEADERS
28	CONCLUSION



Research was carried out between 1ST March – 31st March so all findings in this report reflect the retailers' online policies and web-shop layout within this period



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.

HIGHLIGHTS



- On average, it takes 3 moves to navigate to a retailers return policy on a desktop, 4 moves on a mobile and 3 moves on a tablet device
- 3 brands have a policy that customers can navigate to in one move on a mobile (YumiDirect, Gucci and Arco) and 9 other brands have a policy that can be navigated to in one move on a tablet device
- Mobile navigation is still slower than desktop as it takes five or more moves to navigate to the policy on 30% of websites, compared to just 14% on desktop

NAVIGATION - LEADERBOARD

NAVIGATE
IN 2 MOVES



Arco
Bondara
Charles Clinkard
Clarks
Cloggs
Cotswold Outdoor
Diesel
Dorothy Perkins
Ellis Brigham Sports
END.
Evans
Getthelabel.com
Go Outdoors

H&M
Harvey Nichols
Jimmy Choo
John Lewis
Joy
Karen Millen
La Redoute
MandM Direct
Matchesfashion.com
Moda in Pelle
Moss Bros.
Mulberry
Puma

Reiss
Rohan
Schuh
Surfdome
The Hut
Thomas Pink
Urban Industry
Vivienne Westwood
Wallis
White Stuff
Wynsors World of Shoes
YumiDirect
Zalando

NAVIGATE
IN 3 MOVES



& Other Stories
Bershka
Blacks
Calvin Klein
Camper
Cotton Traders
Craghoppers
CycleSurgery
Decathlon
Deichmann
Dune London
EAST
Ecco
Espirito
Everything5pounds.com
Fat Face
FlipFlop
Foot Asylum
Forever 21
Fred Perry
French Connection
GAP

George at Asda
Gucci
House of Fraser
J Crew
JD Sports
Joe Browns
Joules
Kenzo
Kitbag.com
Lacoste
Lands' End
Laura Ashley
Liberty
Lipsy
Long Tall 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
Nike
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 Woollen Mill
The North Face
The Outnet
The White Company
Toast
Tommy Hilfiger
Topshop
Ugg Australia
Uniqlo
Urban Outfitters
Vans
Ventee-Privee
Whistles
Wiggle
Zara

NAVIGATE
IN 4 MOVES



Abercrombie & Fitch
Adidas
Aldo
Alexandra
All Saints
Ann Summers
Asics
ASOS
Blue Inc
Boden
Bravissimo
Burberry
Cath Kidston
Coast
Crew Clothing

Crocs
Farfetch
Figleaves.com
Flannels
Foot Locker
Freemans.com
Gabor
Gant
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
SecretSales
Simply Be
SportsDirect.com
Sweaty Betty
Topman
Victoria's Secret
Warehouse
Yours Womenswear

NAVIGATE
IN 5 MOVES



Agent Provocateur
Anthropologie
Armani
Banana Republic
Bonmarché
Boohoo.com
Boux Avenue
BrandAlley
Burton
Charles Tyrwhitt
COS

Debenhams
DKNY
Dr.Martens
Free People
G-Star Raw
Hobbs London
Missguided
Pavers
Phase Eight
Poetry Fashion
Radley

NAVIGATE
IN 6 MOVES



Jigsaw

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.

HIGHLIGHTS



- 3 more brands have joined the leader's category this quarter by offering 20+ policies but Matchesfashion.com and ASOS still lead with a tailored returns policy for each country worldwide (followed by Paul Smith with 28 countries)
- 23% of the top global fashion brands simply have a blanket return policy for their International customers without distinguishing between different markets; which is 14% less than last quarter
- Looking at the brands that only tailor their returns message for one country, 80% of these tailor this message to the UK alone.
- 36% of brands now tailor the return message for US customers; which is 5% less than last quarter.

CUSTOMISED BY COUNTRY - LEADERBOARD

20+ TAILORED
POLICIES



Adidas
ASOS
Decathlon

Matchesfashion.com
Paul Smith
Reebok

10+ TAILORED
POLICIES



Armani
Boohoo.com
Deichmann
H&M

Karen Millen
M&S
Missguided
Wiggle

5+ TAILORED
POLICIES



All Saints
Boden
BrandAlley
Clarks
Diesel
Dorothy Perkins
Dr.Martens
Espirít
Evans

Evans
Forever 21
French Connection
JD Sports
Joe Browns
John Lewis
La Redoute
Lands' End
Laura Ashley

Louis Vuitton
MandM Direct
Mango
Miss Selfridge
Monsoon
Mountain Warehouse
Next
Nike
Oasis

Puma
QVC
Rapha
Superdry
Topman
Wallis
Warehouse

2 TAILORED
POLICIES



Aldo
Asics
Banana Republic
Burton
Calvin Klein
Charles Klein
Charles Tyrwhitt
Coast
Debenhams
DKNY
Dune London
Fingleaves.com
Foot Locker
Fred Perry
Free People
GAP

Getthelabel.com
Hackett
Hawes & Curtis
Hobbs London
House of Fraser
J Crew
Jack & Jones
Jimmy Choo
JoJo Maman Bébé
Joules
Kitbag.com
L.K.Bennett
Lacoste
Long Tall Sally
Lovehoney
M&Co

Mamas & Papas
Massimo Dutti
Mint Velvet
Moss Bros.
Net-A-Porter
New Look
Office
PrettyLittleThing
Pull & Bear
Radley
Ralph Lauren
River Island
Simply Be
Surfdome
T.M Lewin
Ted Baker

The North Face
The White Company
Topshop
Ugg Australia
Uniqlo
Urban Outfitters
Vente-Privee
Victoria's Secret
Yours Womenswear

1 TAILORED
POLICY



Agent Provocateur
Arco
Blue Inc
Burberry
Cloggs
Cotswold Outdoor
Cotton Traders
EAST
Ellis Brigham Sports
END.
Farfetch
Fat Face
FlipFlop
Foot Asylum
G-Star Raw

Harrods
Harvey Nichols
Hotter
Jack Wills
Jacques Vert
Jaeger
Jigsaw
Joy
Kurt Geiger
Liberty
Lipsy
Lyle & Scott
Merlin Cycles
Mothercare
Mr Porter

Mulberry
Oliver Bonas
Outdoor & Country
Peacocks
Phase Eight
Poetry Fashion
Pretty Green
Quiz
Reiss
Rohan
Roman Originals
Route One
Selfridges
size?
SportsShoes.com

Sweaty Betty
The Edinburgh Woollen Mill
The Outnet
Thomas Pink
Toast
Urban Industry
Vans
Whistles
White Stuff
Wynsors World of Shoes
YumiDirect
Zalando

BLANKET POLICY FOR ALL
INTERNATIONAL MARKETS
(NO TAILORED POLICIES)



& Other Stories
Abercrombie & Fitch
Alexandra
Ann Summers
Anthropologie
Berska
Blacks
Bondara
Bonmarché
Boux Avenue
Bravissimo
Camper

Cath Kidston
Charles Clinkard
COS
Craghoppers
Crew Clothing
Crocs
CycleSurgery
Ecco
Everything5pounds.com
Flannels
Freemans.com
Gabor

Gant
George at Asda
Go Outdoors
Gucci
Hollister
Jacamo
Kenzo
Milletts
Moda in Pelle
Myprotein
Orvis
Pavers

Pro-Direct
Regatta Outdoor Clothing
Schuh
SecretSales
Snow+Rock
Sole
SportsDirect.com
The Hut
Tommy Hilfiger
Vivienne Westwood
Zara

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?

HIGHLIGHTS



- **74%** of brands now offer more than the industry standard of **14 days to return** items
- **FOUR retailers** continue to offer unbeatable **unlimited returns** (Hollister, Lands' End, Orvis and Rohan) to their customers worldwide
- **Just 2%** of brands advertise **different return periods** to account for longer transit times in markets further afield, which is a sharp decline from a much healthier 10% at the beginning of last year.

TIMESCALE - LEADERBOARD

60+ DAYS



Boden
Charles Tyrwhitt
Clarks
George at Asda
Hawes & Curtis
Hotter
John Lewis

Lands' End
Rapha
Rohan
Route One
Schuh
Wiggle

31+ DAYS
(or 1 month+)



Charles Clinkard
Crew Clothing
Fingleaves.com

Hobbs
M&S
Warehouse Fashion

30+ DAYS



All Saints
Ann Summers
Arco
Blacks Outdoor
Blue Inc.
Boohoo.com
Burberry
Cotswold Outdoor
Doc Martens
Fat Face
French Connection
GO Outdoors
Jigsaw
Jimmy Choo
Kitbag
Long Tall Sally
Mamas & Papas

Monsoon
Moss Bros
Mothercare
Mountain Warehouse
Oasis
Oliver Bonas
QVC
Radley
Roman Originals
Simply Be
Snow + Rock
Surfdome
Sweaty Betty
The White Company
TM Lewin
Topshop
White Stuff

28+ DAYS



ASOS
Bonmarché
Boux Avenue
Bravissimo
Cath Kidston
Coast
Debenhams
Dune London
East
Edinburgh Woollen Mill
Fred Perry
Hackett London
House of Fraser
Jack Wills
Jacques Vert
JD Sports

JoJo Maman Bébé
Joules Clothing
Karen Millen
Laura Ashley
LK Bennett
Lyle & Scott
M&Co
M&M Direct
Matchesfashion.com
Millers
Mint Velvet
Missguided
Mr Porter
Mulberry Company
Net-A-Porter
New Look

Next
Office
Paul Smith
Peacocks
Phase Eight
PrettyLittleThing
Reiss
Selfridges
Size?
Superdry
Ted Baker
The Outnet
Thomas Pink
Whistles

21+ DAYS



Ellis Bringham Sports
Get the Label
Lipsy
Yours Clothing

14 DAYS



Agent Provocateur
Burton
Cloggs
Coggles
Cotton Traders
Direct Golf
Dorothy Perkins
END.
Evans
Everything5pounds.com
Farfetch
Field & Trek
Flannels

Foot Asylum
Harrods
Harvey Nichols
Jaeger
Joe Browns
JOY
Kurt Geiger
Liberty
Mainline Menswear
Marisota
Miss Selfridge
Myprotein
Pavers

Pretty Green
Quiz
River Island
Secretsales.com
Sport Pursuit
SportsDirect.com
Sportsshoes.com
The Hut
Toast
Topman
Wallis
Wynsors World of Shoes

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...

HIGHLIGHTS



- 55% of the top 207 retailers offer free returns in one international market
- 9% offer free returns to all markets worldwide
- 78% of brands offer free returns in the UK, 39% in Ireland, 34% in Germany and 30% in the USA
- 14% of brands still do not offer free returns in any market globally

FREE RETURNS - LEADERBOARD

FREE RETURNS WORLDWIDE		All Saints Burberry Farfetch G-Star Raw Gucci Hackett Kenzo	Louis Vuitton Massimo Dutti Mr Porter Mulberry Net-A-Porter Pull & Bear Puma	Reebok Selfridges The Outnet Vans Zara	
FREE RETURNS AVAILABLE IN 10+ COUNTRIES		Adidas Agent Provocateur Asics ASOS Banana Republic Bershka Calvin Klein Charles Tyrwhitt Clarks	COS Deichmann Ecco Espirit Foot Locker Forever 21 H&M Jimmy Choo Karen Millen	Lacoste M&S Mint Velvet Nike Paul Smith Urban Outfitters Victoria's Secret Zalando	
FREE RETURNS AVAILABLE IN 5+ COUNTRIES		Diesel Dune London Gant JD Sports Joe Browns	La Redoute Matchesfashion.com Oasis River Island Superdry	Thomas Pink Topman Topshop	
FREE RETURNS AVAILABLE IN 2+ COUNTRIES		Anthropologie Boden Boohoo.com Burton Debenhams Dorothy Perkins Dr.Martens Fat Face Fred Perry Free People French Connection Harvey Nichols	Hawes & Curtis House of Fraser J Crew Jack Wills JoJo Maman Bébé Joules L.K.Bennett Lands' End Laura Ashley Long Tall Sally Lovehoney M&Co	Mamas & Papas Miss Selfridge Missguided Monsoon Moss Bros. Mothercare Mountain Warehouse New Look Next Office Pavers PrettyLittleThing	Radley Reiss Schuh Sweaty Betty T.M.Lewin Ted Baker Uniqlo Wallis Warehouse Wiggle
FREE RETURNS AVAILABLE IN 1 COUNTRY (BEYOND UK)		Aldo Alexandra Ann Summers Arco Boux Avenue Bravissimo Camper Charles Clinkard Cloggs Coast Cotswold Outdoor Cotton Traders Craghoppers Crocs Decathlon DKNY EAST END.	Evans Fingleaves.com Flannels FlipFlop Foot Asylum Freemans.com GAP George at Asda Harrods Hobbs London Hollister Hotter Jacamo Jacques Vert Jaeger Jigsaw John Lewis Joy	Kurt Geiger Liberty Lipsy Lyle & Scott MandM Direct Mango Millets Moda in Pelle Oliver Bonas Peacocks Phase Eight Poetry Fashion Quiz QVC Ralph Lauren Rapha Rohan Roman Originals	Simply Be size? Snow+Rock Sole SportsDirect.com Surfdome The Edinburgh Woollen Mill The White Company Ugg Australia Vivienne Westwood Whistles White Stuff Wynsors World of Shoes Yours Womenswear YumiDirect
FREE RETURNS ARE NOT OFFERED TO ANY INTERNATIONAL MARKETS		& Other Stories Abercrombie & Fitch Armani Blacks Blue Inc Bondara Bonmarché BrandAlley Cath Kidston Crew Clothing CycleSurgery Ellis Brigham Sports	EverythingSpounds.com Gabor Getthelabel.com Go Outdoors Jack & Jones Kitbag.com Merlin Cycles Myprotein Orvis Outdoor & Country Pretty Green Pro-Direct	Regatta Outdoor Clothing Route One SecretSales SportsShoes.com The Hut The North Face Toast Tommy Hilfiger Urban Industry Vente-privee	

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?

HIGHLIGHTS



- 29% of brands use returns as a marketing tool through a promotional banner on the homepage
- Just 6% of brands are promoting their returns policy at all three stages (Product page, Basket page and Checkout page), and just 7 of these brands also use a promotional banner on their homepage
- 21% of the top fashion brands do not remind customers of their returns policy at any of the three key stages of purchase compared to 24% in Q4
- 69% of brands promote the returns policy within each product page. 29% promote returns in the basket stage, and just 12% of brands reinforced the message at checkout stage.

POLICY REMINDER - LEADERBOARD

4 REMINDERS		Adidas Agent Provocateur Aldo All Saints	Ann Summers Banana Republic Calvin Klein		
3 REMINDERS		Armani Asics ASOS Bershka Blue Inc Boden Boux Avenue BrandAlley Burberry	Camper Charles Clinkard Clarks Cloggs COS CycleSurgery Dorothy Perkins Ellis Brigham Sports Fred Perry	French Connection Gant GAP G-Star Raw Jacques Vert JD Sports Karen Millen	
2 REMINDERS		& Other Stories Anthropologie Arco Bonmarché Boohoo.com Burton Charles Tyrwhitt Coast Cotswold Outdoor Cotton Traders Craghoppers Crew Clothing Crocs Decathlon	Deichmann Diesel DKNY Dr.Martens EAST Ecco END. Espirit Evans Farfetch Fat Face Figueaves Flannels FlipFlop	Foot Asylum Freemans.com Gabor George at Asda Getthelabel.com Go Outdoors Gucci H&M Harrods Harvey Nichols Hobbs London Hotter House of Fraser Jack & Jones	L.K.Bennett Outdoor & Country Pavers Puma Schuh Snow+Rock SportsShoes.com Superdry Sweaty Betty The Hut Tommy Hilfiger Wiggle YumiDirect Zalando
1 REMINDER		Abercrombie & Fitch Alexandra Blacks Bondara Bravissimo Jacamo Jack Wills Jaeger Jigsaw Jimmy Choo Joe Browns John Lewis JoJo Maman Bébé Joules Joy Kenzo Kurt Geiger La Redoute Lacoste	Lands' End Laura Ashley Liberty Lipsy Long Tall Sally M&Co M&S MandM Direct Mango Massimo Dutti MatchesFashion.com Merlin Cycles Millets Mint Velvet Miss Selfridge Missguided Moda in Pelle Monsoon Moss Bros.	Mothercare Mountain Warehouse Mr Porter Mulberry New Look Nike Oasis Office Oliver Bonas Orvis Paul Smith Phase Eight Pretty Green PrettyLittleThing Pull & Bear Quiz Radley Regatta Outdoor Clothing Reiss	River Island Roman Originals Route One 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		Cath Kidston Debenhams Dune London Everything5pounds.com Foot Locker Forever 21 Free People 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 Woollen Mill The North Face The White Company Thomas Pink	Toast Topshop Ugg Australia Urban Outfitters Vente-Privée Wallis Whistles White Stuff Yours Womenswear Zara

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.

HIGHLIGHTS



- **No brands** offer **instant refunds** yet (after the intent to return is advised online)
- **20%** of retailers still **don't state their refund promise** anywhere on their site (4% more than last quarter)
- **9%** claim to process refunds **within 3 days**, with **2 retailers** refunding **within 24 hours** (ASOS and Charles Tyrwhitt)
- **19%** of brands claim to take **more than 14 days** to process a customer's refund

REFUND PROMISE - LEADERBOARD

< 3 DAYS
UPON RECEIPT



All Saints
ASOS
Boux Avenue
Charles Tyrwhitt
Coggles
Dune London
East
Ellis Brigham Sports
END.
JD Sports

Lands' End
Mainline Menswear
Moss Bros
Mulberry Company
Next
Office
Schuh
Snow + Rock
Sweaty Betty
The Hut

< 5 DAYS
UPON RECEIPT



Clarks
Cloggs
Crew Clothing
Debenhams
Everything5pounds.com
Get The Label
GO Outdoors

Jaeger
M&M Direct
New Look
Route One
The White Company
TM Lewin
Yours Clothing

< 10 DAYS
UPON RECEIPT



Ann Summers
Burberry
Burton
Cath Kidston
Cotswold Outdoor
Doc Martens
Figleaves.com
Foot Asylum
French Connection
Hackett London
Harrods
Hawes & Curtis
Hobbs

Jack Wills
Jacques Vert
Jigsaw
Karen Millen
Lipsy
LK Bennett
Matchesfashion.com
Miss Selfridge
Missguided
Myprotein
Peacocks
Pretty Green
Quiz

SportsDirect.com
Sportsshoes.com
Superdry
Surfdome
Ted Baker
The Outnet
Toast
Topman
Topshop
Wallis
Whistles

< 14 DAYS
UPON RECEIPT



Agent Provocateur
Blacks Outdoor
Boohoo.com
Charles Clinkard
Direct Golf
Farfetch
Field & Trek
Fred Perry
Hotter
House of Fraser

Joe Browns
John Lewis
JoJo Maman Bébé
JOY
Kitbag
Laura Ashley
Liberty
Long Tall Sally
M&S
Mamas & Papas

Millecs
Monsoon
Mountain Warehouse
Oasis
Pavers
QVC
Selfridges
Sport Pursuit
Warehouse Fashion
White Stuff

< 30 DAYS
UPON RECEIPT



Boden
Coast
Evans
Fat Face
Flannels
Harvey Nichols
Joules Clothing
Lyle & Scott
M&Co

Mint Velvet
Mothercare
Phase Eight
PrettyLittleThing
Radley
River Island
Roman Originals
Secretsales.com
Wiggle

NO CLEAR
REFUND
TIME ADVISED



Arco
Blue Inc.
Bonmarché
Bravissimo
Cotton Traders
Dorothy Perkins
Edinburgh Woollen Mill
George at Asda
Jimmy Choo
Kurt Geiger
Marisota

Mr Porter
Net-A-Porter
Oliver Bonas
Paul Smith
Rapha
Reiss
Rohan
Simply Be
Size?
Thomas Pink
Wynsors World of Shoes

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.

HIGHLIGHTS



- 88% of brands now offer a choice of local return options in at least one market globally, which is an 18% increase since last quarter.
- 74% of brands offer a choice of return method in the UK. Of these, 29% of brands offer a collect+ option, 12% offer a MyHermes drop-off point, 6% offer a Doddle drop-off point and 4% offer the AsdaToYou service.
- Five brands now top the leader's category in his area, offering five or more local return options (ASOS, John Lewis, M&S, PrettyLittleThing and River Island)
- The number of brands offering parcel lockers as a local way to return now stands at 3% (7 brands)
- The option to return to a local store is the most popular option offered at 64%, followed by parcel-shops (59%) and courier collection (38%)

CHOICE OF METHOD - LEADERBOARD

5+ RETURN
METHODS
OFFERED



ASOS
John Lewis
M&S

PrettyLittleThing
River Island

4 RETURN
METHODS
OFFERED



Debenhams
Ellis Brigham Sports
Jacamo
Missguided
New Look
Simply Be

3 RETURN
METHODS
OFFERED



Adidas	Forever 21	JD Sports	Nike
Aldo	French Connection	Karen Milen	Oasis
All Saints	Gant	Lands' End	Pull & Bear
Charles Tyrwhitt	G-Star Raw	Laura Ashley	Puma
Clarks	H&M	Long Tall Sally	Ralph Lauren
Decathlon	Hobbs London	M&Co	Warehouse
Deichmann	Hollister	Mango	Yours Womenswear
Fat Face	Hotter	Moss Bros	Zara
Foot Asylum	House of Fraser	Next	

2 RETURN
METHODS
OFFERED



Abercrombie & Fitch	Farfetch	Miss Selfridge	Surfdome
Arco	Foot Locker	Mountain Warehouse	Sweaty Betty
Armani	Fred Perry	Mr Porter	Ted Baker
Banana Republic	Freemans.com	Mulberry	The White Company
Bershka	GAP	Net-A-Porter	Thomas Pink
Blacks	George at Asda	Office	Topman
Boden	Getthelabel.com	Orvis	Topshop
Boohoo.com	Hackett	Pavers	Ugg Australia
Burberry	Harvey Nichols	Poetry Fashion	Uniqlo
Calvin Klein	Jacques Vert	Quiz	Urban Outfitters
Charles Clinkard	Jaeger	QVC	Vans
Coast	L.K.Bennett	Radley	Wallis
Cotton Traders	La Redoute	Reebok	Whistles
Crew Clothing	Liberty	Reiss	Wiggle
CycleSurgery	Louis Vuitton	Schuh	Wynsors World of Shoes
Diesel	Mamas & Papas	Selfridges	Zalando
Dorothy Perkins	MandM Direct	size?	
Dune London	Massimo Dutti	Snow+Rock	
Ecco	Millets	Sole	
Evans	Mint Velvet	Superdry	

1 RETURN
METHOD
OFFERED



Agent Provocateur	Espirit	Kenzo	Rohan
Ann Summers	Flannels	Kitbag.com	Roman Originals
Anthropologie	Free People	Kurt Geiger	SecretSales
Asics	Gabor	Lacoste	SportsDirect.com
Blue Inc	Go Outdoors	Lipsy	SportsShoes.com
Bonmarché	Hawes & Curtis	Lyle & Scott	T.M.Lewin
BrandAlley	J Crew	MatchesFashion.com	The Edinburgh Woollen Mill
Burton	Jack & Jones	Moda in Pelle	The Outnet
Camper	Jack Wills	Monsoon	Toast
Cloggs	Jigsaw	Mothercare	Tommy Hilfiger
Cotswold Outdoor	Jimmy Choo	Oliver Bonas	Victoria's Secret
Craghoppers	Joe Browns	Paul Smith	Vivienne Westwood
Dr.Martens	JoJo Maman Bébé	Peacocks	White Stuff
EAST	Joules	Phase Eight	
END.	Joy	Regatta Outdoor Clothing	

NO RETURN METHODS
OFFERED (BEYOND POST
TO UK ADDRESS)

& Other Stories	Everything5pounds.com	Pretty Green
Bondara	Figleaves.com	Pro-Direct
Boux Avenue	FlipFlop	Route One
Bravissimo	Gucci	The Hut
Cath Kidston	Harrods	The North Face
COS	Lovehoney	Urban Industry
Crocs	Merlin Cycles	Ventee-Privee
DKNY	Myprotein	YumiDirect
Everything5pounds.com	Outdoor & Country	


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

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

SPOTLIGHT ON THE LEADERS

ReBOUND INDEX VALUE:

Adidas	80.00%
ASOS	77.14%
Clarks	77.14%
M&S	74.29%
Puma	71.43%
Calvin Klein	68.57%
Charles Tyrwhitt	65.71%
Lands' End	65.71%
Decathlon	62.86%
JD Sports	62.86%
John Lewis	62.86%
Karen Millen	62.86%
Reebok	62.86%
Aldo	60.00%
All Saints	60.00%
Deichmann	60.00%
H&M	60.00%
La Redoute	60.00%
Moss Bros	60.00%
Nike	60.00%
Schuh	60.00%
Zalando	60.00%

There are now 22 brands sharing 'leading' status in the Returns Race, more than triple the number this time last year! The most consistent players have been ASOS, Clarks and Charles Tyrwhitt, but we also see 11 brands from the new gang joining the top bracket, 5 of which are global sports brands (Adidas, Puma, Decathlon, Reebok and Nike).

TOP 3 PROFILE

Adidas

1st Place
80.00%

It's true what we say, the returns race never sits still! And this quarter we see one of the new entries into the benchmark steal the returns crown as Adidas win the prestigious race to the top in their first quarter.

As a global sports brand known around the world, it's no surprise that they localise their return message to over 27 major countries worldwide, ensuring customers are familiar with personalised return instructions local to them.

They also offer a very lenient return window of 100 days worldwide except for shoppers in the USA, who only get a much shorter 30-day time-frame. However, the returns race monitors the most favourable offering, so this still places Adidas up ahead.

As well as this, Adidas are one of only seven brands who include a reminder of the return message at four of the key areas on the purchase journey – on a promotional banner, on the product page, at the basket stage and at checkout.

Although Adidas have hit the highs with an index value of 80.00%, there is still more work to be done to reach complete potential. In particular, they could look at optimising their mobile site, as currently the route from homepage to policy takes a big 6 moves.

TOP 3 PROFILE

ASOS

Joint 2nd

77.14%

With every quarter of the returns race, ASOS are one of the few brands who have remained consistent in the 'leaders' category.

We have moved the goalposts slightly for two areas in the benchmark this quarter, which means ASOS, along with a handful of other brands, have moved up the rankings. For example, ASOS still offer a very lenient 30 countries FREE returns as they did in Q4 of last year. However, we believe that any brand offering over 10+ countries free returns should deserve more recognition, so we have awarded more points to these brands.

ASOS continues to excel in the choice of return method metric offering a variety of 11 methods in total – from a choice of PUDO's as well as courier collection in a handful of countries. ASOS hold the crown for offering UK customers the widest range of choice in methods to return, as customers can choose to either have their parcel(s) collected by a Hermes Courier, or they can choose between five PUDO's (AsdaToYou, Collect+, Doddle, PassMyParcel or Hermes).

Their main drawback is mobile navigation to the return policy which still takes a massive 6 moves, so this holds them back from hitting an ever higher index value.

TOP 3 PROFILE

Clarks

Joint 2nd

77.14%

For the 5th consecutive report, Clarks have also remained in the 'Leaders' category of the Returns Race. Up one position from last quarter, Clarks now achieve joint second place overall with a ReBOUND index value of 77.14%.

Clarks' quick returns process is where they excel in. They offer customers in the USA a huge 90-day return window, 30 days in the UK and 60 days elsewhere. As well as this lenient offering upfront, they also advertise a very efficient refund processing speed of just 5 days upon receipt.

Clarks miss out on full points this quarter when reinforcing a return message at key stages of the purchase journey. Although they signpost shoppers to the returns information on the product page, at the basket stage and at checkout, they could also optimise this message and display it as a promotional tool via a marketing banner on the websites homepage.

The only area which they have fallen in this quarter is in their range of choice for returns. Back in Q4, Clarks offered four return methods, which has since dropped down to just three.

CONCLUSION

This time last year there were 144 retail runners in 'The Great Returns Race' and just 5 brands finished in the 'leaders' category. Fast-forward a year and the number of return policies which have been put through their paces stands at 207 brands today. We now have 22 brands vying for the number one spot, with 11 newbies joining the ranks since Q4. Adidas has swiped the returns crown from previous leaders Lands' End, with the highest index value recorded so far in the history of the Returns Race. Interestingly, the leading brands seem to be predominantly made up of sportswear and footwear retailers, so these product types seem to have the more sophisticated returns process at present.

As we look at the first quarter of 2017, we have seen free returns grow in popularity yet again, steered by the addition of UK domestic analysis into this report. Currently 78% of brands offer free returns to UK customers and it's also very clear that the choice of return methods is much broader in the UK market. For example ASOS offer customers a variety of parcel shops within the UK where customers can choose from PassMyParcel, AsdaToYou, CollectPlus, Doddle and MyHermes when returning their parcel, which is leagues ahead of most other brands. On top of this, they also tick the right boxes for international customers who are similarly given a choice of return method with courier collections, postal services and parcel-shop networks in several international markets, so this multi-carrier returns approach is not just beneficial to UK customers.

We look forward to watching what happens in the returns world throughout the rest of this year...

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



@ReBOUNDReturns
#ReturnsRace

 **ReBOUND®**

www.reboundreturns.com

www.thereturnsrevolution.com

