

'THE GREAT RETURNS RACE'

ReBOUND
RESEARCH



Q2 BENCHMARK



14 DAYS
EASY
FREE
FAST REFUND
GENEROUS
CLEAR PROCESS
TRENDS
NO QUIBBLE
REFUND
RETURN
365 DAYS TO RETURN
POLICY
LAGGING BEHIND
LEADING
WINNING
HELP

RETURN
WINNING
TRENDS
REFUND
HELP
FAST REFUND
LAGGING BEHIND
NO QUIBBLE
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INTERNATIONAL RETURN POLICIES

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INTRODUCTION

We are delighted to bring you the second edition of 'The Great Returns Race': The UK's only benchmark on international return policies.

We already know that the customer's return experience is increasingly key to the growth of cross-border online sales. However, our findings from quarter 1 of 'The Great Returns Race' revealed that many of the UK's leading brands still fall short of global consumer expectations. So what progress has been made to the return offerings of the 141 leading clothing brands through quarter 2?

This benchmark aims to delve even deeper into the international online returns landscape by highlighting the movers and shakers in the rankings over the last few months. We have also highlighted the brands exhibiting 'best practice' in each metric and will continue to monitor these leading brands in the editions to follow.



If you missed last quarter's benchmark, you can catch up on 'The Great Returns Race' commentary now by viewing the [Q1 benchmark](#) results online.



FOREWORD

BY CAROLE WOODHEAD, CEO, HERMES

“

I'm pleased to recommend this innovative study by ReBOUND which reports on an aspect of the ecommerce world which is often under-reported and misunderstood. 'The Great Returns Race' celebrates the best-in-class returns policies of some of the UK's leading brands. This research is key to understanding the frustrations of a customer's return experience from an international perspective, so is especially relevant to the Hermes client base; many of which have been benchmarked in this study.

For anyone who still doubts the impact that a solid returns offering can have on customer loyalty, 'The Great Returns Race' gives you the knowledge you need to develop a first class returns proposition. Hermes will be collaborating with ReBOUND to produce similar studies in other areas including the UK domestic market in the future. And although it's early days in this series of returns reports, it's already fascinating to monitor the trends and see which brands are implementing the necessary changes to remain competitive. I look forward to seeing how the next quarter unfolds...

”

RESEARCH RECAP

Our research focuses on **seven core metrics** to assess the international return offering of the UK's top brands within the clothing sector. These key areas can be measured from the information published on the retailers' **online return policy**, so reflect the **cross-border consumer return experience** from the point at which it is first communicated to the customer.

We have used the most recent IRUK Top 500 database as our starting point and filtered out any brands that are not of UK origin, that do not sell apparel products and do not sell cross-border, leaving **141 retailers this quarter**.

We have scored the retailers using a points system attributed to each of the seven key metrics from 0-50 (maximum 350 points in total). In the instance of a varied returns offering for different markets, we have grouped retailers according to their most favourable proposition under each metric, choosing to **reward points** for where steps have been made **to improve the returns experience** rather than to penalise.

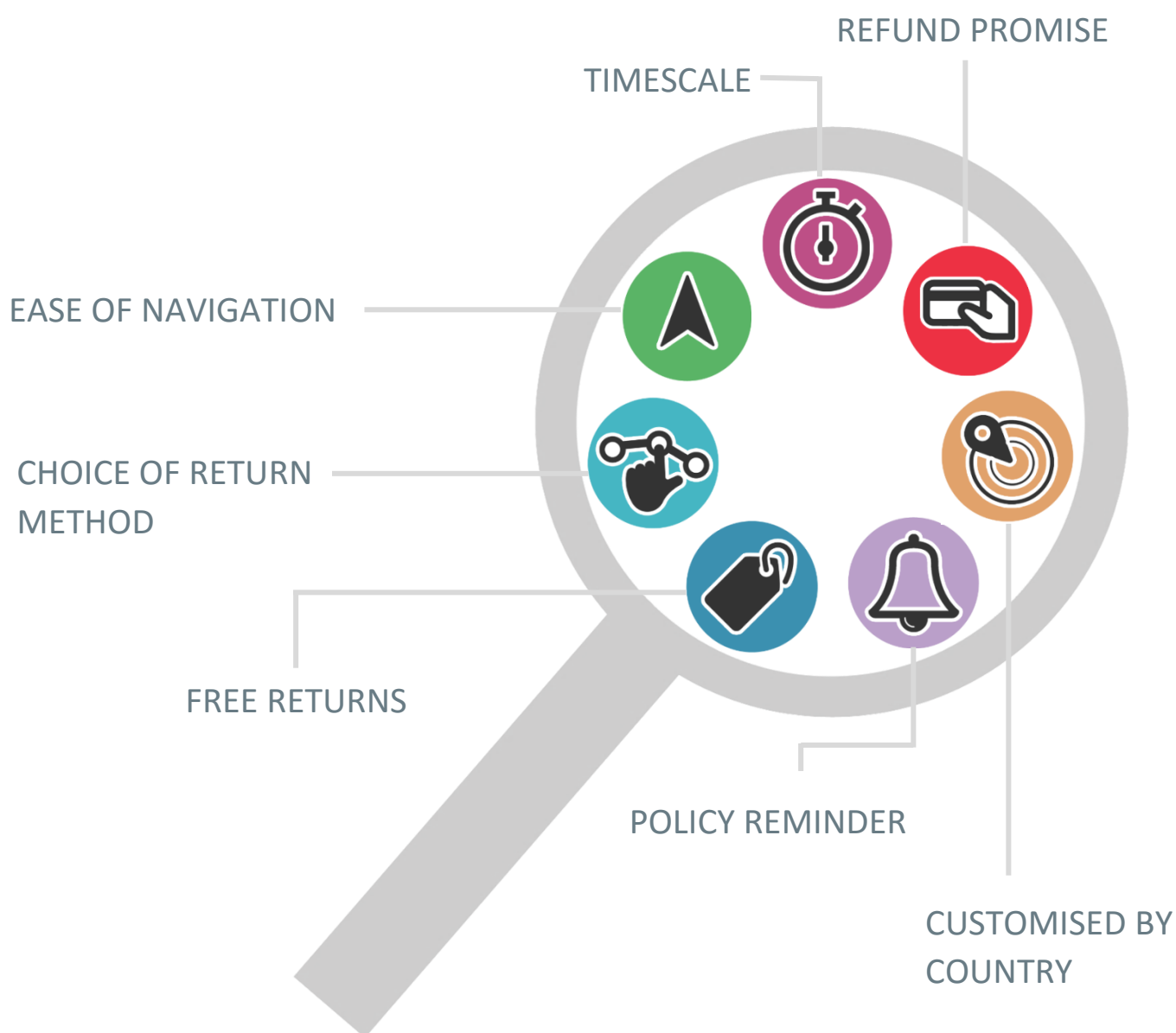
By attributing points to each metric, this allows us to present a blended view across all metrics. These combined scores have then been converted into a percentage to give them their **ReBOUND index values**. Keeping with our theme, these index values correspond with the following positions;

Leaders (60%+)
Runners Up (50%)
Challengers (40%)
Picking Up Pace (30%)
Lagging Behind (20%)
On The Starting Grid (10%)

WHAT HAVE WE MEASURED?

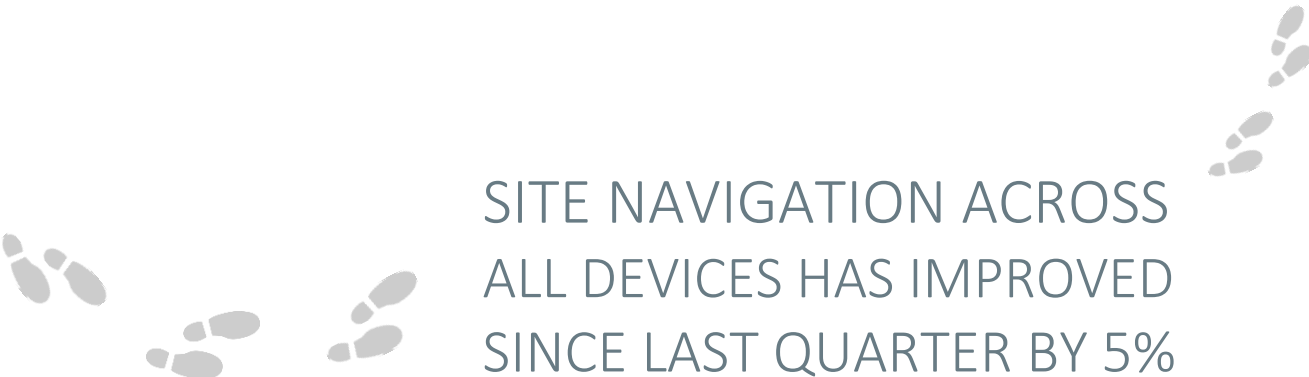
THERE'S MORE TO A RETURN POLICY THAT MEETS THE EYE

All of these metrics are relevant in making the returns experience as seamless as possible for international purchases...



Research was carried out between 23rd May-17th June 2016 so all findings in this report reflect the retailers online policies and webshop layout within this period.

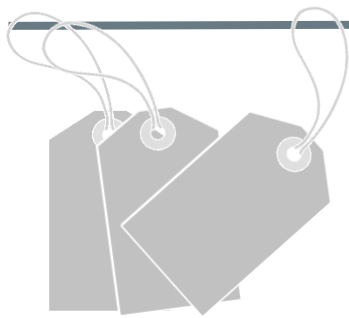
KEY FINDINGS AT A GLANCE



SITE NAVIGATION ACROSS
ALL DEVICES HAS IMPROVED
SINCE LAST QUARTER BY 5%

4% MORE BRANDS HAVE EXTENDED
THEIR RETURNS POLICY SINCE Q1

(76% NOW OFFER MORE THAN 14 DAYS COMPARED TO 72%)



THE TOP 3 COUNTRIES
FOR FREE RETURNS ARE:
IRELAND (26%)
GERMANY (27%)
USA (23%)

THE AVAILABILITY OF A COURIER
RETURN OPTION IS STILL
MORE POPULAR THAN PUDO'S.
(32% OFFER COURIERS WHEREAS
ONLY 27% OFFER PUDOS)



THE MAJORITY OF THE LEADERS
OFFERING A CUSTOMISED RETURNS
POLICY FOR EACH MARKET ARE
PUREPLAY ONLINE SHOPS (4/6)



METRIC 1

EASE OF NAVIGATION



14 DAYS
EASY
FREE
FAST REFUND
GENEROUS
CLEAR PROCESS
TRENDS
NO QUIBBLE
REFUND
RETURN
365 DAYS TO RETURN
POLICY
LAGGING BEHIND
LEADING
WINNING
HELP

RETURN
WINNING
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HIGHLIGHTS

- **21%** of retailers' policies **take 2 moves** on average to get from the landing page to the return policy.
- In contrast, only **13%** of retailer's policies take **2 moves** for the same journey on a **mobile device**.
- It takes **5 or more moves** to navigate to the international return policy on **4 brands** websites (Ann Summers, Harrods, Matchesfashion.com and Paul Smith).
- Site navigation across **all devices** has improved **by 5%** since last quarter.



RECAP METHODOLOGY

- Quickest route to International policy wins.
- Measuring no. of clicks and scrolls across multiple devices.

For the full picture, take a look at where this all began in the [Q1 benchmark...](#)



EASE OF NAVIGATION - MOBILE

TOP

NAVIGATE
IN 2 MOVES



Agent Provocateur
Cath Kidston
Coggles
Cotswold Outdoor
Dorothy Perkins
Ellis Brigham Mountain Sports
GO Outdoors
Harvey Nichols
Karen Millen

Miss Selfridge
Moss Bros
Mothercare
Myprotein
Next
The Hut
Thomas Pink
Warehouse Fashion
White Stuff

NAVIGATE
IN 3 MOVES



All Saints
Arco
Boux Avenue
Bravissimo
Burton
Charles Clinkard
Crew Clothing
Doc Martens
Dune London
East
END.
Everything5pounds.com
Fat Face
Foot Asylum
French Connection
George at Asda
Hobbs
Jacques Vert
Jaeger

JoJo Maman Bébé
JOY
Kitbag
Lands End
Laura Ashley
Lipsy
LK Bennet
Lyle & Scott
M&M Direct
Mainline Menswear
Mamas & Papas
Marisota
New Look
Office
Oliver Bonas
Peacocks
Pretty Green
PrettyLittleThing
Radley

Rapha
Reiss
Rohan
Roman Originals
Route One
Schuh
Secretsales.com
Surdome
Sweaty Betty
The Outnet
The White Company
Topman
Topshop
Wallis
Wynsors World of Shoes

NAVIGATE
IN 4 MOVES



ASOS
Blacks Outdoor
Blue Inc.
Bonmarché
Boohoo.com
Charles Tyrwhitt
Clarks
Cloggs
Debenhams
Direct Golf
Edinburgh Woolen Mill
Evans
Fred Perry
Get the Label

Hawes & Curtis
Hotter
Jack Wills
Jigsaw
Kurt Geiger
Long Tall Sally
M&Co
Mint Velvet
Missguided
Mountain Warehouse
Mr Porter
Mulberry Company
Oasis
Pavers

Phase Eight
Quiz
QVC
River Island
Selfridges
Simply Be
Size?
Snow + Rock
SportsDirect.com
Sportsshoes.com
Ted Baker
Toast
Whistles
Yeomans Outdoor Leisure

NAVIGATE
IN 5 MOVES



Boden
Burberry
Coast
Cotton Traders
Farfetch
Fingleaves.com
Flannels
Hackett London
Harrods
House of Fraser
JD Sports
Joe Browns

Joules Clothing
Liberty
M&S
Millets
Monsoon
Net-A-Porter
Sports Pursuit
Superdry
TM Lewin
Wiggle
Yours Clothing

NAVIGATE
IN 6 MOVES



Ann Summers
Jimmy Choo
John Lewis
Matchesfashion.com
Paul Smith

BOTTOM

EASE OF NAVIGATION ACROSS ALL DEVICES

TOP

NAVIGATE
IN 2 MOVES



Agent Provocateur
Cath Kidston
Charles Clinkard
Cotswold Outdoor
Crew Clothing
Ellis Brigham Mountain Sports
French Connection
Jacques Vert
JOY
Karen Millen
Mamas & Papas
Miss Selfridge
Mothercare
Myprotein
Next

Oliver Bonas
Peacocks
Reiss
Rohan
Route One
Schuh
Secretsales.com
The Hut
The Outnet
Thomas Pink
Topman
Topshop
Wallis
Warehouse Fashion
White Stuff

NAVIGATE
IN 3 MOVES



All Saints
ASOS
Blacks Outdoor
Blue Inc.
Boohoo.com
Boux Avenue
Bravissimo
Burton
Charles Tyrwhitt
Clarks
Cloggs
Coggles
Debenhams
Direct Golf
Doc Martens
Dorothy Perkins
Dune London
East
Edinburgh Woolen Mill
END.
Evans
Everything5pounds.com
Farfetch
Fat Face
Flannels

Foot Asylum
George at Asda
GO Outdoors
Harvey Nichols
Hawes & Curtis
Hobbs
Hotter
Jaeger
JD Sports
JoJo Maman Bébé
Joules Clothing
Kitbag
Kurt Geiger
Lands End
Laura Ashley
LK Bennet
Long Tall Sally
Lyle & Scott
M&M Direct
Mainline Menswear
Marisota
Millets
Mint Velvet
Missguided
Monsoon

Moss Bros
Mulberry Company
New Look
Office
Pavers
PrettyLittleThing
QVC
Radley
Rapha
River Island
Roman Originals
Selfridges
Size?
Snow + Rock
SportsDirect.com
Sportsshoes.com
Surfdome
Sweaty Betty
Ted Baker
The White Company
Whistles
Wynsors World of Shoes
Yeomans Outdoor Leisure

NAVIGATE
IN 4 MOVES



Arco
Boden
Bonmarché
Burberry
Coast
Cotton Traders
Figueaves.com
Fred Perry
Get the Label
Hackett London
House of Fraser
Jack Wills
Jigsaw

Jimmy Choo
Joe Browns
John Lewis
Liberty
Lipsy
M&Co
M&S
Mountain Warehouse
Mr Porter
Net-A-Porter
Oasis

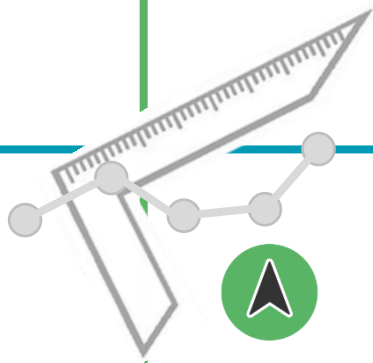
Phase Eight
Pretty Green
Quiz
Simply Be
Sports Pursuit
Superdry
TM Lewin
Toast
Wiggle
Yours Clothing

NAVIGATE
IN 5 MOVES



Ann Summers
Harrods
Matchesfashion.com
Paul Smith

BOTTOM



HOW DOES THIS COMPARE TO Q1?

How has our analysis changed since Q1?

Due to the increased usage of mobile and tablet devices for online shopping, we have recognised the value in highlighting whether a brands mobile site is fully optimised. For Q2 we have displayed the rankings for navigation on a mobile device, not just the average across all devices.

How have the results changed since Q1?

Overall, the ease of navigation has improved slightly across multiple devices since Q1. Now just 26% of the 141 retailers have a return policy that we define as 'hard to find' (4 or more moves from landing page to policy), which is 5% less than the Q1 study.

We have also seen a surprising improvement in tablet navigation, which may correspond to the increased popularity of shoppers using these as their preferred device. In Q1, Flannels Clothing was the only brand to be described as a 'one-click-wonder', whereas there are now four brands that promote their international returns policy on the homepage in one swift move when using a tablet device. (Flannels, Reiss, French Connection and Schuh).

METRIC 2

TIMESCALE





HIGHLIGHTS:

- 1 retailer offers unlimited returns (Rohan).
- 76% of brands now offer more than the industry standard of 14 days to return items, compared to a slightly lower 72% last quarter.
- 14% of brands advertise different return periods to account for longer transit times in markets further afield.



RECAP METHODOLOGY

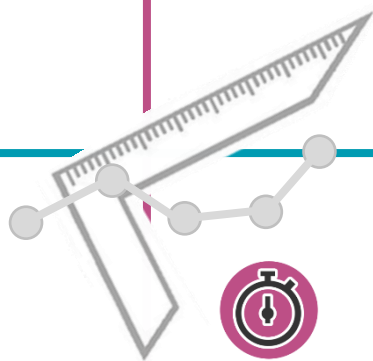
- Most generous return period wins.
- Timeframes for customers in different international markets were measured and ranked by longest return period on offer.

For the full picture, take a look at where this all began in the [Q1 benchmark...](#)

TIMESCALE LEADERBOARD

TOP

60+ DAYS		Boden Charles Tyrwhitt Clarks Cloggs George at Asda Hawes & Curtis Hotter	John Lewis Rapha Rohan Schuh TM Lewin Wiggle
31+ DAYS (OR 1 MONTH+)		Charles Clinkard Crew Clothing Figleaves.com	Hobbs Jimmy Choo M&S
30+ DAYS		All Saints Ann Summers Arco Blue Inc. Boohoo.com Burberry Doc Martens Fat Face French Connection GO Outdoors Jigsaw Karen Millen Kitbag Laura Ashley Long Tall Sally Mamas & Papas Marisota	Monsoon Mountain Warehouse Oasis Oliver Bonas QVC Radley Roman Originals Simply Be Snow + Rock Surfdome Sweaty Betty The White Company Topshop Warehouse Fashion White Stuff Wynsors World of Shoes
28+ DAYS		ASOS Bonmarché Boux Avenue Bravissimo Burton Cath Kidston Coast Cotswold Outdoor Debenhams Dorothy Perkins Dune London East Edinburgh Woolen Mill Fred Perry Hackett London House of Fraser Jack Wills	Jacques Vert JD Sports Joules Clothing Lands End LK Bennet Lyle & Scott M&Co M&M Direct Matchesfashion.com Millets Mint Velvet Moss Bros Mothercare Mr Porter Mulberry Company Myprotein Net-A-Porter New Look Next Office Paul Smith Peacocks Phase Eight PrettyLittleThing Reiss Selfridges Size? Superdry Ted Baker The Outnet Thomas Pink Topman Wallis Whistles
21+ DAYS		Ellis Brigham Sports Get the Label Lipsy Yours Clothing	
14+ DAYS		Agent Provocateur Blacks Outdoor Coggles Cotton Traders Direct Golf END. Evans Everything5pounds.com Farfetch Flannels Foot Asylum Harrods	Harvey Nichols Jaeger Joe Browns JoJo Maman Bébé JOY Kurt Geiger Liberty Mainline Menswear Miss Selfridge Missguided Pavers Pretty Green Quiz River Island Route One Secretsales.com Sports Pursuit SportsDirect.com Sportsshoes.com The Hut Toast Yeomans Outdoor Leisure

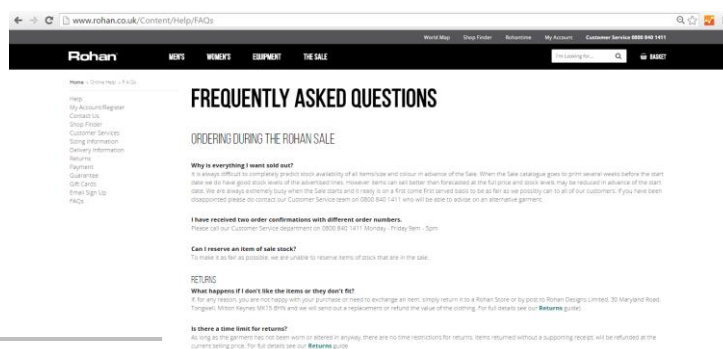


HOW DOES THIS COMPARE TO Q1?

There has been a 4% increase in the number of brands that are advertising different return timeframes in different markets. For example, Laura Ashley offer multiple return timeframes across 5 different countries – Hong Kong (7 days), Japan (8 days), Australia (14 days), Greece (30 days) and ROW (29 days).

Last quarter we praised three top brands for offering a whopping 365 days to return, but this quarters' benchmark revealed a new leader in this return metric; outdoor clothing brand Rohan. Rohan have trumped their generosity by advertising an unlimited return period; as long as the products are unworn and unaltered.

EXAMPLE OF BEST PRACTICE...



UNLIMITED TIMESCALE

Is there a time limit for returns?

As long as the garment has not been worn or altered in anyway, there are no time restrictions for returns.

METRIC 3

REFUND PROMISE



14 DAYS
EASY
FREE
FAST REFUND
GENEROUS
CLEAR PROCESS
TRENDS
NO QUIBBLE
REFUND
RETURN
365 DAYS TO RETURN
POLICY
LAGGING BEHIND
LEADING
WINNING
HELP

RETURN
WINNING
TRENDS
REFUND
HELP
FAST REFUND
LAGGING BEHIND
NO QUIBBLE
14 DAYS
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HIGHLIGHTS:

- **No** brands offer **instant refunds** ie. After intent to return is advised online.
- **18%** of retailers **do not state their refund promise** anywhere on their site.
- **33%** advise a refund time of longer than 14 days upon receipt of goods. This was **22%** in Q1.
- **9%** of brands advertise **different refund promises** for different markets.



RECAP METHODOLOGY

- Brands were ranked from quickest refund time to longest.
- Some brands have multiple refund times in different markets. These were ranked according to the shortest advertised time.

For the full picture, take a look at where this all began in the [Q1 benchmark...](#) 

REFUND PROMISE LEADERBOARD

TOP

<3 DAYS
UPON RECEIPT



All Saints
ASOS
Cloggs
Coggles
Debenhams
East
Ellis Brigham Sports
END.

JD Sports
Mainline Menswear
Moss Bros
Next
Office
Schuh
The White Company

<5 DAYS
UPON RECEIPT



Blue Inc.
Charles Tyrwhitt
Clarks
Crew Clothing
Doc Martens
Dune London
Everything5pounds.com
Jaeger
Karen Millen
Lands End

M&M Direct
New Look
Route One
Selfridges
Simply Be
Snow + Rock
TM Lewin
White Stuff
Yours Clothing

<10 DAYS
UPON RECEIPT



Ann Summers
Boden
Bonmarché
Boux Avenue
Burberry
Cath Kidston
Cotswold Outdoor
Cotton Traders
Fred Perry
Get the Label
Hackett London
Hawes & Curtis

Hobbs
Jack Wills
Jacques Vert
Jigsaw
Jimmy Choo
Laura Ashley
Liberty
Lipsy
Mamas & Papas
Millets
Missguided
Mulberry Company

Pavers
Peacocks
Pretty Green
Quiz
Rapha
Reiss
Sportsshoes.com
Surfdome
The Outnet
Toast
Whistles
Wynsors World of Shoes

<14 DAYS
UPON RECEIPT



Agent Provocateur
Burton
Charles Clinkard
Direct Golf
Evans
House of Fraser
Joe Browns
JoJo Maman Bébé
Kitbag
Kurt Geiger
Long Tall Sally

Monsoon
Mountain Warehouse
Oasis
Phase Eight
QVC
Sports Pursuit
SportsDirect.com
Ted Baker
Topman
Wallis

<30 DAYS
UPON RECEIPT



Boohoo.com
Edinburgh Woolen Mill
Fat Face
Flannels
Foot Asylum
Harvey Nichols
Hotter
Joules Clothing
JOY

LK Bennet
Lyle & Scott
M&Co
M&S
Mint Velvet
Miss Selfridge
Mothercare
Myprotein
PrettyLittleThing

Radley
River Island
Roman Originals
Secretsales.com
Topshop
Warehouse Fashion
Wiggle
Yeomans Outdoor Leisure

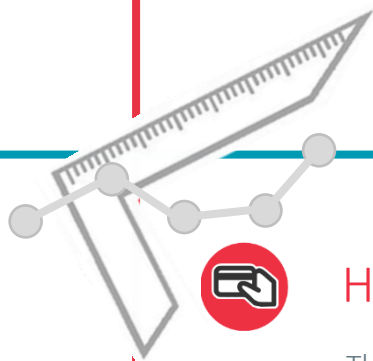
NO CLEAR
REFUND
TIME ADVISED



Arco
Blacks Outdoor
Bravissimo
Coast
Dorothy Perkins
Farfetch
Figueaves.com
French Connection
George at Asda
GO Outdoors
Harrods
John Lewis

Marisota
Matchesfashion.com
Mr Porter
Net-A-Porter
Oliver Bonas
Paul Smith
Rohan
Size?
Superdry
Sweaty Betty
The Hut
Thomas Pink

BOTTOM



HOW DOES THIS COMPARE TO Q1?

This is the metric which reveals the biggest variance between brands. There seems to be no industry standard for a refund promise with many brands focusing their advice on how long it will take the bank to process the refund, rather than how long it will take them operationally to process the return once it's been received. Given that this benchmark focuses on the international return experience, we believe the most helpful advice to a customer is the number of days upon receipt, as transit times can vary hugely.

How have the results changed since Q1?

There are now significantly fewer brands offering a quick refund promise of 5 days or less; this number has fallen from 38% to 24% since Q1. More brands are falling down the rankings in this metric due to a longer refund promise - 33% now publicise a refund that takes longer than 14 days, compared to 22% in Q1. Overall it's clear that more improvements still need to be made in this area due to the large number of brands still not advertising a refund promise anywhere on their site.

EXAMPLE OF BEST PRACTICE...

CLEAR PROMISE

24HRS UPON RECEIPT

DEBENHAMS

Track Orders | Help/Contact us | Wish List | Sign In | My Bag: 0 item(s) - £ 0.00

Select Country

Women | Lingerie | Men | Kids | Shoes | Home | Gifts | Toys | Designer | Offers

SIGN UP TO OUR INTERNATIONAL EMAIL > | PayPal THE FASTER, SAFER WAY TO PAY | FREE DELIVERY WHEN YOU SPEND OVER £30 > | UP TO 60% OFF DRESSES* > | UP TO 60% OFF MEN'S SHOES & BOOTS > | UP TO 60% OFF BEDDING >

Returns

- ▶ What is the returns, exchange and refunds policy?
- ▼ How long will it take for my refund to be processed?

Once we have received your return at our warehouse we will process your return within 24 hours. You should expect to see your refund in your account within 5 working days once you have received your 'Return refund complete' update email, please note some banks may take longer than 5 working days to process refund payment.

If you have not received your refund and it has been 10 working days since receiving your 'Return refund complete' update email, please contact our [Customer services team](#).

▼ How long will it take for my refund to be processed?

Once we have received your return at our warehouse we will process your return within 24 hours.

METRIC 4

POLICY REMINDER



14 DAYS
EASY
FREE
FAST REFUND
GENEROUS
CLEAR PROCESS
TRENDS
NO QUIBBLE
REFUND
RETURN
365 DAYS TO RETURN
POLICY
LAGGING BEHIND
LEADING
WINNING
HELP

RETURN
WINNING
LAGGING BEHIND
TRENDS
REFUND
HELP
FAST REFUND
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CLEAR PROCESS
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HIGHLIGHTS:

- 28% of the top fashion brands do not remind customers of their returns policy at any of the three key stages of purchase. (Product page, Basket page and Checkout page).
- 68% have a returns policy reminder within each product page, but only 19% enforced their policy in the basket stage to encourage customers to checkout.
- Since last quarter, double the amount of brands are using all three touchpoints to signpost their return policy (a jump from 3% to 6%) – These brands are House of Fraser, Burberry, Clarks, M&S, Matchesfashion.com, Net-A-Porter, Pretty Green, Sweaty Betty.



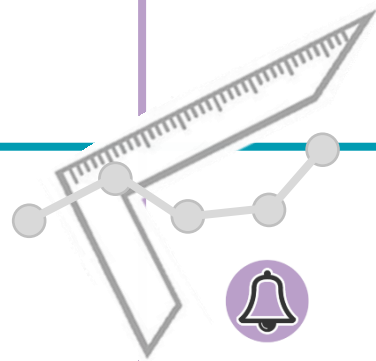
RECAP METHODOLOGY

- Three key stages were measured: Product page, basket stage and checkout.
- Retailers were ranked highest if they included the returns message on each of the three pages, as these are key touch points in the shoppers buying decision.

For the full picture, take a look at where this all began in the [Q1 benchmark...](#) 

REFUND PROMISE LEADERBOARD

		TOP		
3 REMINDERS		House of Fraser Burberry Clarks M&S	Matchesfashion.com Net-A-Porter Pretty Green Sweaty Betty	
2 REMINDERS		ASOS Bonmarché Boux Avenue Crew Clothing Farfetch Fat Face Harrods Jaeger JD Sports	Jimmy Choo Millets Mr Porter River Island Roman Originals Simply Be Ted Baker The White Company Topshop	
1 REMINDER		Agent Provocateur Ann Summers Arco Blue Inc. Boden Boohoo.com Charles Clinkard Charles Tyrwhitt Cloggs Coggles Cotton Traders Debenhams Doc Martens Dorothy Perkins Dune London Ellis Brigham Mountain Sports END. Evans Figleaves.com Flannels Fred Perry French Connection George at Asda Get the Label GO Outdoors	Hackett London Harvey Nichols Hobbs Hotter Jacques Vert Jigsaw Joe Browns John Lewis Joules Clothing Karen Millen Kurt Geiger Laura Ashley Liberty Lipsy Long Tall Sally M&M Direct Marisota Mint Velvet Missguided Monsoon Moss Bros Mothercare Mountain Warehouse Mulberry Company Oasis	Office Oliver Bonas Paul Smith Phase Eight PrettyLittleThing Rapha Reiss Route One Schuh Selfridges Size? Snow + Rock SportsDirect.com Superdry Surfdome The Hut The Outnet TM Lewin Topman Warehouse Fashion Whistles White Stuff Wiggle Wynsors World of Shoes Yours Clothing
NO REMINDERS		All Saints Blacks Outdoor Bravissimo Burton Cath Kidston Coast Cotswold Outdoor Direct Golf East Edinburgh Woolen Mill Everything5pounds.com Foot Asylum Hawes & Curtis Jack Wills	JoJo Maman Bébé JOY Kitbag Lands End LK Bennet Lyle & Scott M&Co Mainline Menswear Mamas & Papas Miss Selfridge Myprotein New Look Next Pavers	Peacocks Quiz QVC Radley Rohan Secretsales.com Sports Pursuit Sportsshoes.com Thomas Pink Toast Wallis Yeomans Outdoor Leisure
		BOTTOM		



HOW DOES THIS COMPARE TO Q1?

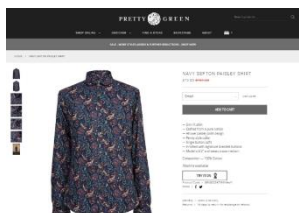
How have the results changed since Q1?

There has been a significant improvement in brands reinforcing a returns reminder in each of the three stages measured in the Q2 benchmark (product page, basket stage and checkout). This could be a 'one-liner', or a simple hyperlink through to the returns policy.

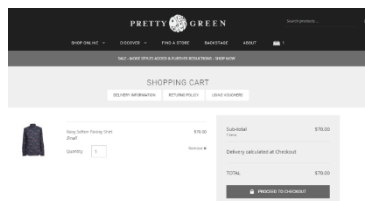
Now, double the amount of brands are using multiple touchpoints which remind customers of their return policy (albeit a small jump from 3% to 6%). However, only one brand (Pretty Green) has remained in this leading bracket by exhibiting a policy reminder at all 3 stages, showing consistent best-practice under this metric throughout Q1 and Q2.

EXAMPLE OF BEST PRACTICE...

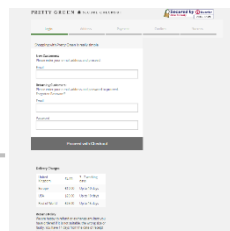
SUBTLE RETURNS REMINDER



PRODUCT PAGE



BASKET



CHECKOUT

METRIC 5

CHOICE OF RETURN METHOD






HIGHLIGHTS:

- 58% of brands offered international shoppers a local return choice.
- The option to return via a courier is still more common than via PUDO (32% offer couriers whereas only 27% offer PUDO's).
- Only 3 brands offer shoppers the ability to return using a parcel locker. (ASOS, Debenhams and JD Sports).
- 11 brands (8%) offer a choice of 4 different return methods but no brands achieved the highest possible score under this metric.



RECAP METHODOLOGY

- Retailers were measured on the choice of return methods offered to customers.
- The highest possible score for this metric was 5 options; PUDO, courier collection, in-store, parcel lockers and postage to local address.

For the full picture, take a look at where this all began in the [Q1 benchmark...](#) 

CHOICE OF RETURN METHOD LEADERBOARD

4 RETURN METHODS OFFERED		ASOS All Saints Clarks Debenhams Fred Perry French Connection	Karen Millen Lands End Long Tall Sally Reiss Topman	TOP	
3 RETURN METHODS OFFERED		Boohoo.com Charles Tyrwhitt Doc Martens Harvey Nichols Laura Ashley LK Bennett M&S Mamas & Papas	Moss Bros Mothercare Net-A-Porter Paul Smith QVC Surfdome The Outnet		
2 RETURN METHODS OFFERED		Boden Burberry Hobbs Hotter House of Fraser JD Sports Jigsaw Jimmy Choo Joules Clothing Liberty Missguided Mr Porter	Mulberry Company Next Oasis Radley River Island Schuh Ted Baker The White Company Topshop Warehouse Fashion Wiggle		
1 RETURN METHODS OFFERED		Agent Provocateur Arco Burton Charles Clinkard Cloggs Dorothy Perkins Ellis Brigham Sports End. Farfetch Fat Face Fingleaves.com	Get The Label Hackett London Hawes & Curtis Jack Wills Joe Browns M&M Direct Marisota Matchesfashion.com Mint Velvet Monsoon Mountain Warehouse	New Look Office Pretty Green PrettyLittleThing Rapha Roman Originals Selfridges Simply Be Superdry Thomas Pink Wallis	
NO LOCAL RETURN METHODS OFFERED		Ann Summers Blacks Outdoor Blue Inc. Bonmarché Boux Avenue Bravissimo Cath Kidston Coast Coggles Cotswold Outdoor Cotton Traders Crew Clothing Direct Golf Dune London East Edinburgh Woolen Mill Evans Everything5pounds.com Flannels Foot Asylum	George at Asda GO Outdoors Harrods Jacques Vert Jaeger John Lewis JoJo Maman Bébé JOY Kitbag Kurt Geiger Lipsy Lyle & Scott M&Co Mainline Menswear Millets Miss Selfridge Myprotein Oliver Bonas Pavers Peacocks	Phase Eight Quiz Rohan Route One Secretsales.com Size? Snow + Rock Sports Pursuit SportsDirect.com Sportsshoes.com Sweaty Betty The Hut TM Lewin Toast Whistles White Stuff Wynsors World of Shoes Yeomans Outdoor Leisure Yours Clothing	BOTTOM



HOW DOES THIS COMPARE TO Q1?

How has our analysis changed since Q1?

We have re-defined our criteria for what qualifies as a return method because simply advising shoppers to send their items back to the UK is a necessity rather than a choice. We have therefore looked for a local return method in Q2.

How have the results changed since Q1?

Our findings have revealed that more than half (58%) of brands offer international shoppers a choice of how to return their purchase beyond a standard postal return back to the UK. We found that courier collection is still the most popular return method after posting directly back to a UK address, with 32% of brands offering this as an option. This is closely followed by posting to a local address, with 30% of brands offering an in-country return address and PUDO's are still a largely under-used return option at only 27%.

Once again no brand scored the maximum amount of points by offering 5 methods of return from international markets (parcel-shop, parcel locker, courier collection, local address and in-store).

EXAMPLE OF BEST PRACTICE...

MULTIPLE
OPTIONS
CLEARLY
OUTLINED



RETURNS VIA UPS

Return your unwanted items for free, by requesting a complementary UPS returns label from our [Customer Services](#) team.

1. Email Customer Services, making sure you include your order number, first name, surname and full address (including state and postcode).
2. Clearly mark on the delivery & returns note included with your order which items you are returning; the reason for returning them and whether you would like an exchange or refund. We are only able to exchange an item for the same style in a different colour/size. **Please ensure this is enclosed inside your parcel before sending.**
3. Once you receive your UPS returns label by email, print off and attach it to your parcel, ensuring that all original delivery labels are covered to avoid confusion.
4. Drop off your parcel at locations of The UPS Store®, any UPS Drop Box®, any UPS Customer Centre, UPS Alliance Locations (Office Depot® and Staples®) or any UPS Authorised Shipping Outlet; or give your package to a UPS driver.
Please note: if you wish to schedule a collection, then you will be required to pay any costs incurred.

*The maximum acceptable size for each UPS Drop Box package is 16" x 13" x 3".

RETURNING ITEMS BY POST

Fred Perry does not cover the cost of returns by post as a free UPS returns label can be obtained from our [Customer Services](#) team (see above). You may make your own arrangements to return items via the postal service. Clearly mark on the delivery & returns note included with your order which items you are returning; the reason for returning them and whether you would like an exchange or refund. We are only able to exchange an item for the same style in a different colour/size. **Please ensure this form is enclosed inside your parcel before sending.** For your protection we advise that you use a recorded delivery service and obtain proof of posting. We cannot accept liability for goods that get lost or damaged in transit back to us.

The address to return items to is:

Fred Perry Returns Department
Statco Warehouse
301 16th Street
Jersey City, NJ 07310, USA

RETURNS VIA A FRED PERRY SHOP

If you are the purchaser and wish to return your online order, please bring the following documentation along with your item to one of our USA shops: **delivery & returns note included with your order, proof of your identity and the card** which you made payment with. All of these must correspond to the **billing address**.

METRIC 6

FREE RETURNS



14 DAYS
EASY
FREE
FAST REFUND
GENEROUS
CLEAR PROCESS
TRENDS
NO QUIBBLE
REFUND
RETURN
365 DAYS TO RETURN
POLICY
LAGGING BEHIND
LEADING
WINNING
HELP

RETURN
WINNING
TRENDS
REFUND
HELP
FAST REFUND
LAGGING BEHIND
NO QUIBBLE
14 DAYS
LEADING
365 DAYS TO RETURN
GENEROUS
CLEAR PROCESS
RETURN
FREE
EASY
CHOICE
POLICY

FREE
TREN
RETU
REFUN
WINNI
FAST REF
LAGGING BE
NO QUIB
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HIGHLIGHTS:

- 49% of the top 141 retailers offer free returns in at least one international market.
- 5% offer free returns to all markets worldwide.
- 27% of brands offer free returns in Germany.
- Only 1 brand refunds the original delivery cost when the entire order is returned (Simply Be).



RECAP METHODOLOGY

- Retailers were measured on whether they offered free international returns as common practice.
- Brands who advertise free returns in the most number of countries wins.

For the full picture, take a look at where this all began in the [Q1 benchmark...](#) 

FREE RETURNS LEADERBOARD

TOP

FREE RETURNS
WORLDWIDE



Burberry
Farfetch
Hackett London
Mr Porter

Mulberry Company
Net-A-Porter
The Outnet

FREE RETURNS IN
50+ COUNTRIES



All Saints
Jimmy Choo

Mint Velvet
Selfridges

FREE RETURNS IN
5+ COUNTRIES



ASOS
Clarks
Dune London
JD Sports
Joe Browns
Karen Millen
M&S
Matchesfashion.com

Mothercare
Oasis
Paul Smith
River Island
Superdry
Topman
Warehouse Fashion

FREE RETURNS IN
2+ COUNTRIES



Charles Tyrwhitt
Debenhams
Fred Perry
French Connection
Hawes & Curtis
Hotter
Jigsaw
Laura Ashley

Long Tall Sally
Moss Bros
New Look
Next
Reiss
Topshop
Ted Baker
Wiggle

FREE RETURNS IN 1
COUNTRY BEYOND
THE UK



Agent Provocateur
Arco
Boden
Boohoo.com
Burton
Cloggs
Dorothy Perkins
Evans
Fat Face
Harvey Nichols
House of Fraser
Jack Wills
Joules Clothing
Lands End

M&M Direct
Mamas & Papas
Mountain Warehouse
PrettyLittleThing
QVC
Radley
Rapha
Schuh
Sweaty Betty
The White Company
Thomas Pink
TM Lewin
Wallis

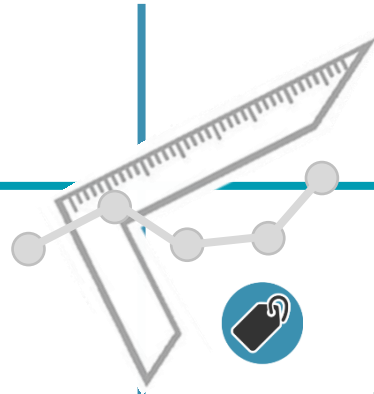
FREE RETURNS ARE
NOT OFFERED TO ANY
INTERNATIONAL MARKETS

Ann Summers
Blacks Outdoor
Blue Inc.
Bonmarché
Boux Avenue
Bravissimo
Cath Kidston
Charles Clinkard
Coast
Coggles
Cotswold Outdoor
Cotton Traders
Crew Clothing
Direct Golf
Doc Martens
East
Edinburgh Woollen Mill
Ellis Brigham Mountain Sports
END,
Everything5pounds.com
Figleaves.com
Flannels
Foot Asylum
George at Asda

Get The Label
GO Outdoors
harrods
Hobbs
Jacques Vert
Jaeger
John Lewis
JoJo Maman Bébé
JOY
Kitbag
Kurt Geiger
Liberty
Lipsy
LK Bennett
Lyle & Scott
M&Co
Mainline Menswear
Marisota
Milets
Miss Selfridge
Missguided
Monsoon
MyProtein
Office

Oliver Bonas
Pavers
Peacocks
Phase Eight
Pretty Green
Quiz
Rohan
Roman Originals
Route One
Secretsales.com
Simply Be
Size?
Snow + Rock
Sports Pursuit
SportsDirect.com
Sportsshoes.com
Surfdome
The Hut
Toast
Whistles
White Stuff
Wynsors World of Shoes
Yeomans Outdoor Leisure
Yours Clothing

BOTTOM



HOW DOES THIS COMPARE TO Q1?

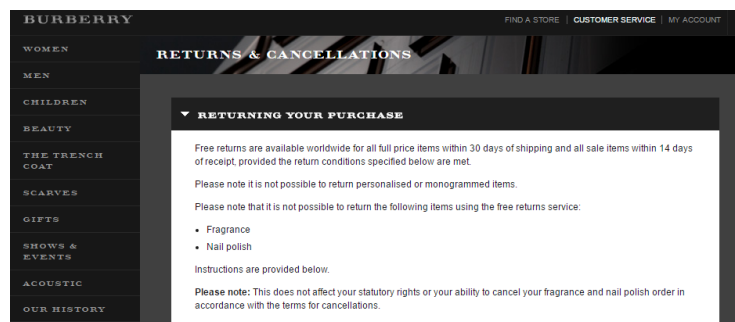
Just under half (49%) of the top 141 retailers offer free returns in at least one international market, which is only a 1% increase from Q1. However, we do expect this number to increase steadily as more retailers fall under pressure from shoppers who demand free returns.

ASOS have vastly expanded the number of countries they offer free returns in. They now offer free returns in a massive 28 countries around the world, compared to the 6 they previously offered in Q1. All Saints have also extended their free returns offering by accepting returns in their European store network at no charge.

Findings in Q1 revealed that the US market was a main focus for UK brands when offering free returns. However, our findings this quarter has seen the focus shift to Germany, with 27% of brands advertising free returns here, followed by 26% in Ireland and 23% in the USA.

EXAMPLE OF BEST PRACTICE...

FREE RETURNS WORLDWIDE



▼ RETURNING YOUR PURCHASE

Free returns are available worldwide for all full price items within 30 days of shipping and all sale items within 14 days of receipt, provided the return conditions specified below are met.

METRIC 7

CUSTOMISED FOR EACH COUNTRY



14 DAYS
EASY
FREE
FAST REFUND
GENEROUS
CLEAR PROCESS
TRENDS
NO QUIBBLE
REFUND
RETURN
365 DAYS TO RETURN
POLICY
LAGGING BEHIND
LEADING
WINNING
HELP

RETURN
WINNING
TRENDS
REFUND
HELP
FAST REFUND
LAGGING BEHIND
NO QUIBBLE
14 DAYS
LEADING
365 DAYS TO RETURN
GENEROUS
CLEAR PROCESS
RETURN
FREE
EASY
CHOICE
POLICY

FREE
TREN
RETU
REFUN
WINNI
FAST REF
LAGGING BE
NO QUIB
HEL
LENIE
LEADI
365 DAYS TO R
GENE
CLEAR PRO
EAS
LEADI
14 DA
CHOI
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LAGGING BE



HIGHLIGHTS:

- Only 1 brand has a tailored returns policy for each country worldwide (matchesfashion.com).
- There has been a 6% increase in the number of brands tailoring their return policies since Q1.
- There is more emphasis on a customised policy for the US market above any other, as 33% have a specific policy tailored for the USA.
- 38% of the top UK fashion brands simply have a blanket return policy for their international customers without distinguishing between different markets.



RECAP METHODOLOGY



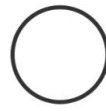
- Brands have been ranked in order of how many different markets their policies address (highest number ranking top - lowest number ranking bottom).
- If the retailer has a different returns message for different parts of the world, we have counted how many different markets they directly address.

For the full picture, take a look at where this all began in the [Q1 benchmark...](#)



CUSTOMISED FOR EACH COUNTRY LEADERBOARD

'CUSTOMIZED FOR EACH COUNTRY' LEADERBOARD

20+ TAILORED POLICIES		ASOS Matchesfashion.com Paul Smith	TOP	
10+ TAILORED POLICIES		M&S Boohoo.com Karen Millen	Topman Wiggle	
5+ TAILORED POLICIES		All Saints Boden Charles Tyrwhitt Clarks Debenhams Dorothy Perkins French Connection JD Sports Joe Browns John Lewis	Lands End Laura Ashley Long Tall Sally M&M Direct Mamas & Papas Miss Selfridge Missguided Monsoon Moss Bros Mothercare	Mountain Warehouse Next Oasis QVC Superdry Surfdome Ted Baker Topshop Warehouse Fashion
2+ TAILORED POLICIES		Agent Provocateur Ann Summers Arco Burberry Burton Cloggs Coast Cotswold Outdoor Doc Martens Dune London Ellis Brigham Mountain Sports Evans Farfetch Fat Face Fingleaves.com Fred Perry Get the Label	Harvey Nichols Hawes & Curtis Hobbs Hotter Jack Wills Jigsaw Jimmy Choo Joules Clothing Liberty Mint Velvet Mr Porter Mulberry Company Myprotein Net-A-Porter New Look Office PrettyLittleThing	Radley Rapha Reiss River Island Route One Schuh Selfridges Simply Be Sweaty Betty The Outnet The White Company Thomas Pink TM Lewin Wallis Yours Clothing
1 TAILORED POLICIES		House of Fraser Marisota		
BLANKET POLICY FOR ALL INTERNATIONAL MARKETS (NO TAILORED POLICIES)		Blacks Outdoor Blue Inc. Bonmarché Boux Avenue Bravissimo Cath Kidston Charles Clinkard Coggles Cotton Traders Crew Clothing Direct Golf East Edinburgh Woolen Mill END. Everything5pounds.com Flannels Foot Asylum George at Asda GO Outdoors	Hackett London Harrods Jacques Vert Jaeger JoJo Maman Bébé JOY Kitbag Kurt Geiger Lipsy LK Bennet Lyle & Scott M&Co Mainline Menswear Millets Oliver Bonas Pavers Peacocks Phase Eight	Pretty Green Quiz Rohan Roman Originals Secretsales.com Size? Snow + Rock Sports Pursuit SportsDirect.com Sportsshoes.com The Hut Toast Whistles White Stuff Wynsors World of Shoes Yeomans Outdoor Leisure
				BOTTOM



HOW DOES THIS COMPARE TO Q1?

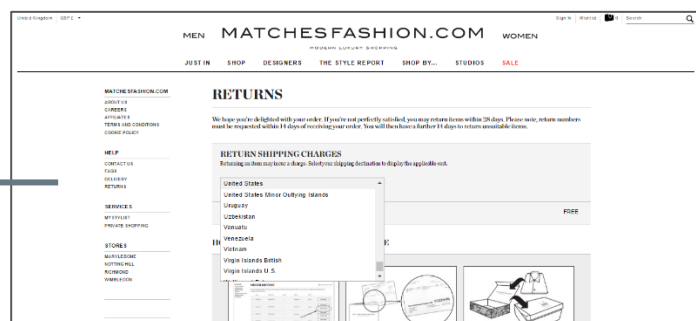
It seems that more brands are starting to realise the importance of tailoring policies per country, as there has been a 6% increase since Q1. By implementing these changes, retailers are setting the tone early on for a more personable return experience.

The USA still stands out as a market where a bespoke message is offered with a third of brands tailoring US return advice. Other countries that are also popular when tailoring policies are Germany (28%), Ireland (24%), Australia (20%) and France (20%).

Paul Smith joins ASOS and Matchesfashion.com in the leader's category this quarter, offering more than 20 customised policies to international customers. That's a huge rise from just 4 local policies in the previous quarter. However, Matchesfashion.com still tops the pack as the only brand that customises policies for every country worldwide.

EXAMPLE OF BEST PRACTICE...

POLICY PER MARKET IN
DROP-DOWN MENU



OVERALL RESULTS



OVERALL RESULTS

LEADERS

60% +



All Saints
ASOS
Burberry
Charles Tyrwhitt
Clarks
Debenhams
JD Sports

Jimmy Choo
Karen Millen
M&S
Moss Bros
Schuh
The Outnet
Topman

RUNNERS UP

50% +

Boden
Boohoo.com
Cloggs
Doc Martens
Fred Perry
French Connection
Hawes & Curtis
Hotter
Lands End
Laura Ashley
Long Tall Sally
Mamas & Papas
Mothercare

Mulberry Company
Net-A-Porter
Next
Oasis
Rapha
Reiss
Selfridges
Surfdome
Ted Baker
The White Company
Topshop
Warehouse Fashion
Wiggle

CHALLENGERS

40% +

Charles Clinkard
Crew Clothing
Dune London
Ellis Brigham Sports
Farfetch
Fat Face
Hackett London
Hobbs
House of Fraser
Jigsaw
Joe Browns

Joules Clothing
M&M Direct
Matchesfashion.com
Mint Velvet
Missguided
Monsoon
Mountain Warehouse
Mr Porter
New Look
Office
Paul Smith

QVC
Radley
River Island
Simply Be
Superdry
Sweaty Betty
TM Lewin
Wallis
White Stuff

PICKING UP PACE

30% +

Agent Provocateur
Ann Summers
Arco
Blue Inc.
Bonmarché
Boux Avenue
Burton
Cath Kidson
Coggles
Cotswold Outdoor
Dorothy Perkins
East
END.

Evans
Fingleaves.com
George at Asda
Get The Label
Harvey Nichols
Jack Wills
Jacques Vert
Jaeger
John Lewis
Liberty
LK Bennett
Marisota
Millets

MyProtein
Peacocks
Pretty Green
PrettyLittleThing
Rohan
Roman Originals
Route One
Snow + Rock
Thomas Pink
Whistles
Wynsors World of Shoes

LAGGING BEHIND

20% +

Bravissimo
Coast
Cotton Traders
Direct Golf
Edinburgh Woollen Mill
Everything5pounds.com
Flannels
GO Outdoors
JoJo Maman Bébé
JOY

Kitbag
Kurt Geiger
Lipsy
Lyle & Scott
M&Co.
Mainline Menswear
Miss Selfridge
Oliver Bonas
Pavers
Phase Eight

Quiz
Secretsales.com
Size?
SportsDirect.com
Sportsshoes.com
The Hut
Toast
Yours Clothing

ON THE STARTING GRID

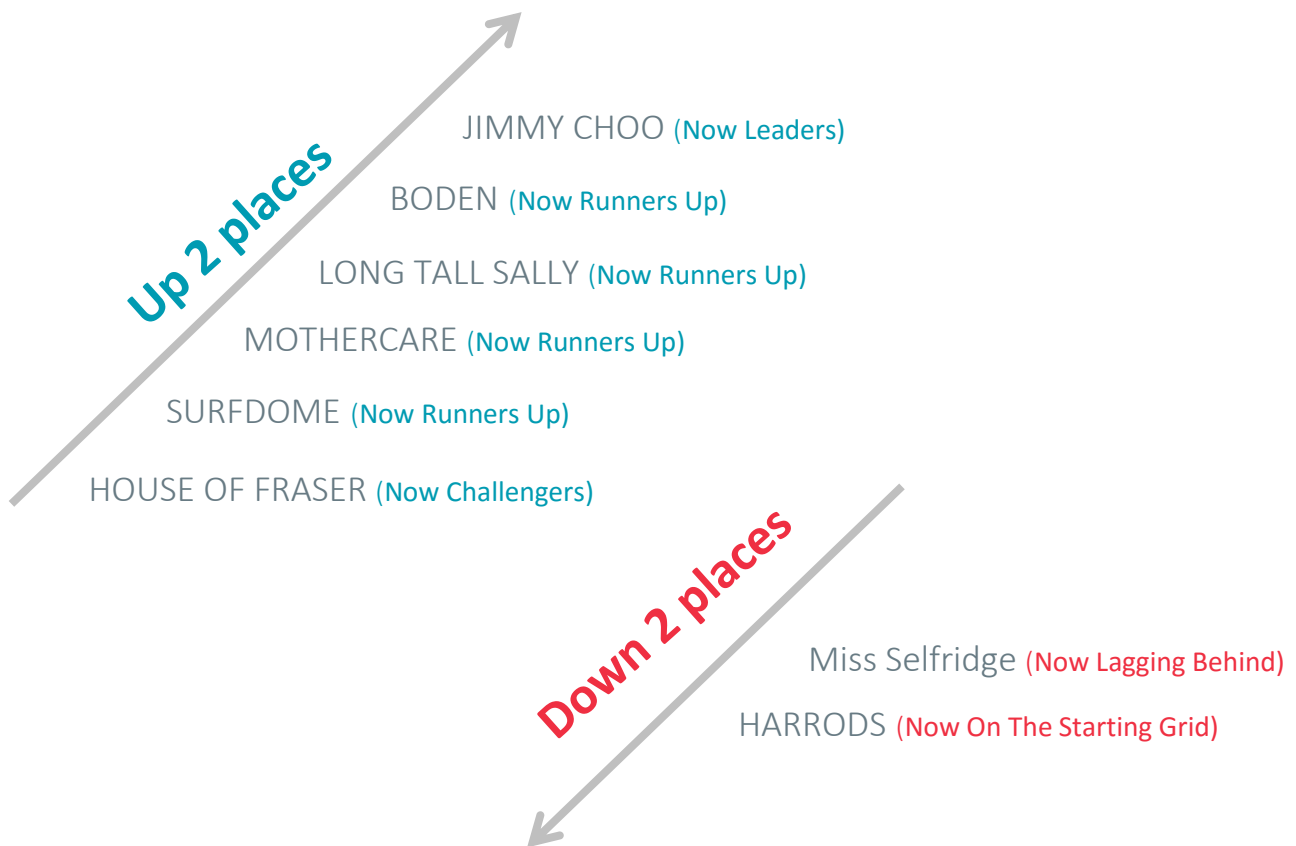
10% +

Blacks Outdoor
Foot Asylum
Harrods
Sport Pursuit
Yeomans Outdoor Leisure

TOP

BOTTOM

RISERS AND FALLERS

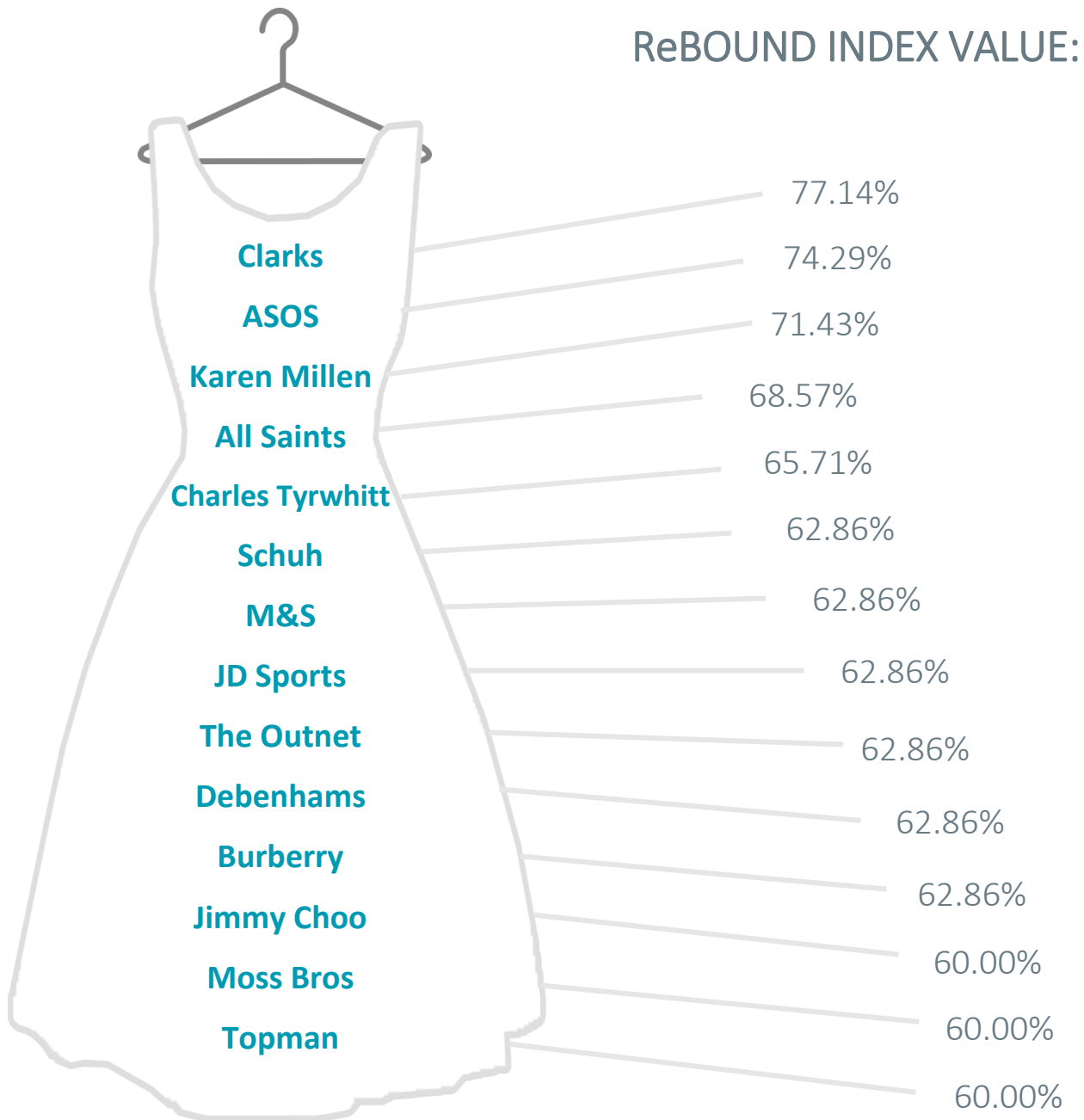


Jimmy Choo, Boden, Long Tall Sally, Mothercare, Surfdome and House of Fraser are all great examples of brands who have implemented a handful of key changes to their return policy in order to jump up two categories in the overall rankings. These eight brands should be commended on their efforts as they now present a slicker return message to their international customer base.

However, two brands; Harrods and Miss Selfridge stand out for landing two categories below their previous Q1 position. Since Q1, both Harrods and Miss Selfridge have limited the number of return methods offered to international customers by only advising customers to send items back to the UK. Both brands have also made changes to their website navigation which has affected the number of moves it takes to find the international return policy. Miss Selfridge have also stripped away their returns policy reminders and so no longer signpost this in any of the three key stages we have measured.

WHAT MAKES A LEADING BRAND IN RETURNS?

There's eight more brands sharing winning status than last quarter so hats off to all the following brands for coming top of the leader board this quarter. Special mention must also go to ASOS, Clarks, Charles Tyrwhitt and Moss Bros for maintaining leading status but even the leading brands are not at full-steam. Take a look at their ReBOUND index values which show their overall scores...



1st Place

77.14%

Clarks

Clarks excel in 'The Great Returns Race' with a lenient return period of 90 days for US customers and 60 days for the rest of the world. They have also remained consistent leaders since Q1 with the top score of 77.14%.

Since Q1, Clarks have reinforced the international returns message at all of the three key stages of the customer journey, easily signposting customers to the relevant returns information.

Clarks have a number of international sites which customers can find their local returns information on. Alongside this, they have introduced a number of convenient and flexible ways to return; from posting to a local address, requesting a courier collection, dropping the order off at a local parcel shop or returning to store in the USA.

They could still make improvements to simplify their site navigation on mobile devices, as this seems to be their main downfall.

2nd Place

74.29%

ASOS

ASOS too have remained in the top spot since last quarter and in the space of a few months we've seen their ReBOUND index value rise from 65.71% to 74.29%. The most noticeable change to account for this increase is their bold launch of a FREE returns offering to many European markets and no-doubt other brands will aim to follow suit.

Where ASOS particularly excel is in their localised approach to international markets. ASOS have also impressed with a quick refund time, promising to refund customers upon receipt in the USA, France, Germany and Russia within one day.

The brand has improved on their previous setbacks in overall site navigation. But the number of moves on a mobile device could still be improved to help customers more quickly access the relevant returns advice.

3rd Place

71.43%

Karen Millen

Karen Millen has significantly improved their returns offering since Q1; moving from the 'Runners Up' category into the top 3! This means they've managed to earn an additional 14.29% overall with a few choice changes to their international returns policy.

The most noticeable change in Karen Millen's international policy is an increase in return timeframe from 14 days to 30 days for ROW. Their most favourable refund promise has also been drastically cut from 10-14 days to 3-5 days upon receipt for the USA.

Karen Millen displays tailored policies online for 12 of the international markets they sell to. Of these, half are offered free returns by up to four different methods (post to local address, courier collection, parcel-shop and in-store in Australia, New Zealand, Ireland and USA). This customisation by country includes varied timeframes across different international markets.

To take their online returns experience a step even further, Karen Millen could reinforce the returns message throughout the purchase journey as currently, the brand only uses the product page as a returns reminder.

CONCLUSION

Congratulations to the leading fourteen brands which have emerged on top in Q2. We can only expect this top bracket to continue to grow as more retailers begin to focus on optimising their international return policies. It's especially great to see which brands are becoming trend-setters for the returns experience and encouraging to see that this is for a mix of both luxury brands and high street retailers alike (some of which we're pleased to say are ReBOUND clients!)

As we continue to monitor the changes being made to the online policies of the UK's leading brands throughout the business year, we're especially eager to see whether the returns landscape changes much in the run-up to peak or whether we see more developments happening from January/ February onwards.

Meanwhile, 'The Great Returns Race' is on! We will continue to reflect on each quarter to discover which brands are setting the benchmark and which brands are falling short of their international shopper's return expectations...



If you missed last quarter's benchmark, you can catch up on 'The Great Returns Race' commentary now by viewing the [Q1 benchmark](#) results online.





If you'd like to get ahead of the game and move up in 'The Great Returns Race', then [get in touch](#) to discuss how ReBOUND can support your international shopper's return experience.



We're also pleased to announce that we are now able to facilitate UK returns as well as cross-border, so you're now able to manage your entire global returns through a single platform!

Join in the discussion online through Twitter or send us your comments to research@reboundreturns.com

@ReBOUNDReturns

#ReturnsRace

