

ReBOUND
RESEARCH



'THE GREAT RETURNS RACE'

RETAILER RETURNS BENCHMARK
SPOTLIGHT ON CROSS-BORDER FASHION POLICIES
Q1 2016



WHO HAS A WINNING
INTERNATIONAL RETURNS
POLICY?

CONTENTS

1	WHY BOTHER BENCHMARKING RETURNS?
2-3	BACKGROUND TO RESEARCH
3	WHAT HAVE WE MEASURED?
4-5	METHODOLOGY
6	KEY FINDINGS AT A GLANCE
7	OVERALL RANKINGS
8-9	WHAT MAKES A LEADING BRAND IN RETURNS?
10	LET'S TAKE A CLOSER LOOK AT EACH METRIC...
10-11	METRIC 1 'CHOICE OF RETURN METHOD'
12-14	METRICS 2-4 'EASE OF NAVIGATION'
15-16	METRIC 5 'TIMESCALE'
17-18	METRIC 6 'POLICY REMINDER'
19-20	METRIC 7 'FREE RETURNS'
21-22	METRIC 8 'CUSTOMISED FOR EACH COUNTRY'

FOREWORD BY ANDREW STARKEY, HEAD OF E-LOGISTICS, IMRG

“

IMRG are committed to supporting innovative research amongst our membership to take the UK e-retail market forward. The impact of cross-border returns is still underestimated, yet getting this right is critical to cross-border customer acquisition and loyalty. This new research; produced by ReBOUND allows us to look in some detail at the elements that make a good cross-border returns offer and signposts some actionable findings.

‘The Great Returns Race’ benchmark is a well-focused study of this core aspect in online retail which is an increasingly important aspect in a shopper’s purchase cycle. We know that most shoppers will read the return policy before browsing, but the findings in this report shows that it’s still pretty clear that many retailers can do more to reassure customers right up front. By putting the spotlight on international returns, this research provides a significant step towards understanding how to improve returns and is certainly not just data for data’s sake.

There’s more to a return policy than meets the eye and this study uncovers some interesting comparisons between how the leading brands are paving the way in ‘best-practice’ returns.

It’s a well-documented fact that shoppers are still apprehensive about buying from international sites, largely due to worries about the returns process; but the best in class retailers prove that these barriers can come down. By scrutinising the first key touch-point with the retailer’s returns offering; the return policy, this report neatly unpicks some of the reasons why some of the UK’s top fashion brands might yet be falling short of their international shopper’s modern day expectations.

”

WHY BOTHER BENCHMARKING RETURNS?

Our experience at ReBOUND suggests that the consumer expectation of a UK shopper's return experience is much more advanced compared with the experience of an international shopper purchasing from the same UK retailer. This distinct difference between the domestic return process and international process is clearly marked in the retailers return policy.



We know that...

A **FREE returns** offering can increase sales by up to **357%** ¹

67% of shoppers will review the retailer's return policy will do so before checking out. ²

Yet **consumer concerns about the ability to return** unwanted orders is the **single biggest barrier to cross-border trade** for international shoppers. ³



Your returns policy says a lot about your brand.

In this benchmark, we attempt to bring a lot of these findings side by side for the UK's top apparel brands.



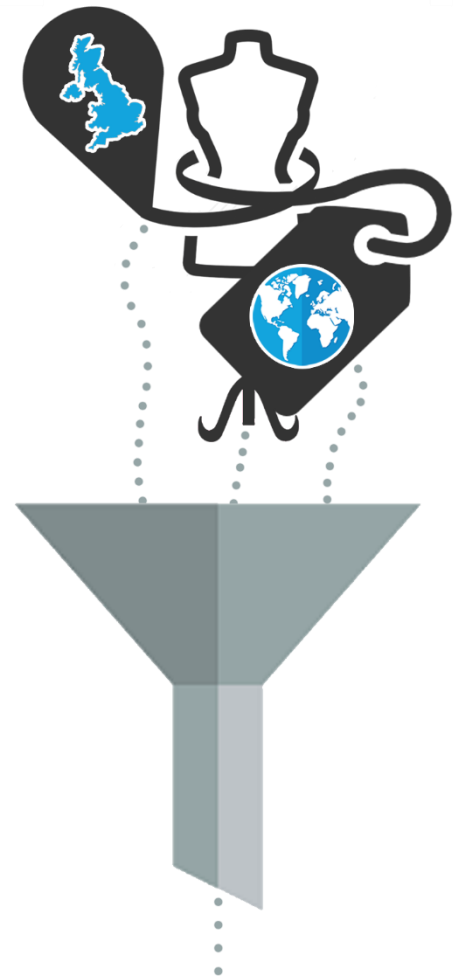
BACKGROUND TO RESEARCH

This report evaluates the returns performance of some of the most significant fashion retailers in the UK.

In order to produce this benchmark we have assessed the UK's top fashion brands which sell internationally. We have studied their online return policies; specifically honing our search criteria on the user-experience from an international shopper's perspective. We have focused on this select group of UK based online retailers that sell apparel products (this includes footwear and outdoor wear) and analysed their returns policies to identify common trends, weaknesses and benchmark these top brands based solely on their international returns policies. As a result, this report gives valuable insight into the cross-border focus of the UK's top fashion brands and helps us to identify best-practice in returns.

HOW DID WE DECIDE WHICH BRANDS TO MEASURE?

As a starting point, we took the database produced by the IRUK Top 500 report. We filtered out any brands which were not of UK origin, any brands which did not sell Apparel products, or any brands which did not sell internationally. This left us with a pool of 139 brands to measure.



139

**UK FASHION
BRANDS SELLING
INTERNATIONALLY**

WHAT IS THE IRUK TOP 500?

The IRUK Top 500 is a very comprehensive report which reveals which brands are considered the top 500 retailers both on and offline. The assessment criteria looks at the use of strategy, customer focus, operations & logistics, merchandising, brand & engagement and use of channels. This thorough approach has provided an excellent platform for this returns benchmark.

WHAT HAVE WE MEASURED?

Our study has focused on eight key metrics to assess the cross-border consumer return experience based on the information published on the retailer's websites. All of these metrics are relevant in making the returns experience as seamless as possible for international purchases.



ADDITIONAL SUBMETRICS



LAYOUT/
STRUCTURE



SEASONAL
ALLOWANCES

METHODOLOGY

WHEN?

Research was conducted over a duration of two weeks in December 2015, so all findings reflect the retailers policies and online shop layout between this period.

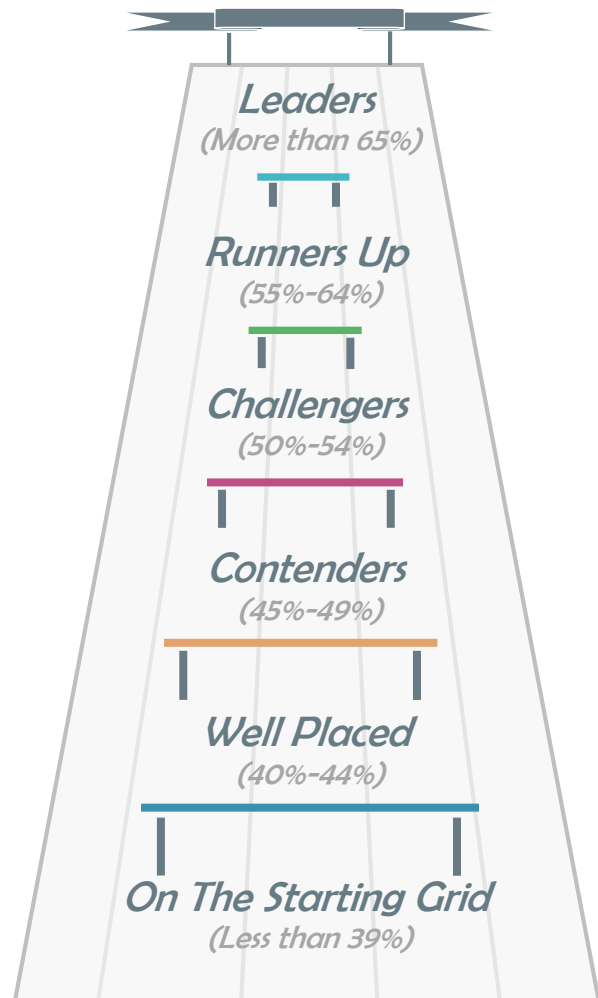


HOW HAVE THEY BEEN RANKED?

We have ranked all 139 brands under each key metric, so we know which retailers are leading under each category e.g which retailers are leading based on the generosity of time period given to return, or offering international shoppers free returns. We have also created a blended view across all metrics to identify overall which brands are winning the great returns race.

We have scored the retailers using a points system attributed to each of the 8 key metrics (maximum of 480 points in total). These scores have then been converted into a percentage to give them their ReBOUND index values. Keeping to our theme, these index values correspond with the following positions;

Leaders,
Runners Up,
Challengers,
Contenders,
Well Placed,
On The Starting Grid.



KEY FINDINGS AT A GLANCE



Around **22%** of the 139 brands we studied have **international policies** which are difficult to find.



67% of these brands offer **more than** the industry standard **14 days** return period.

The most **common return method** offered is postal with couriers coming second.



Less than **3%** offer **FREE** returns worldwide.



67% of brands issue a blanket return policy for international customers.



We spotted **no definite correlation** between the **leading brands** and their **policy layout/structure**.

OVERALL RANKINGS

TOP

LEADERS

65% +



Clarks
Mr Porter
French Connection
Net-A-Porter

Matchesfashion.com
Karen Millen
Ben Sherman

RUNNERS UP

55%-64%

Charles Tyrwhitt
ASOS
Harvey Nichols
Reiss
Isabella Oliver
Wiggle
Next

Superdry
Ellis Brigham Sports
Warehouse Fashion
White Stuff
Dune London
Charles Clinkard
Selfridges

Burberry
Crew Clothing
M&S
Mint Velvet

CHALLENGERS

(50%-54%)

Topshop
Mama and Papas
Moss Bros
The White Company
Outnet.com
Paul Smith
Musto
Farfetch.com
Fred Perry
Joseph
Roman Originals
Hawes and Curtis
TM Lewin
Schuh

Go Outdoors
Office
Fat Face
Joules Clothing
M&Co
Sweaty Betty
Jacques Vert
Kitbag
Craghoppers
Joe Browns
Mothercare
Laura Ashley
Coast
Boux Avenue

Cath Kidson
Mountain Warehouse
Oasis
Oliver Bonas
Simply Be
Rohan
Whistles
Agent Provocateur
Flannels
The Hut
Moda in Pelle
Bench
Debenhams
Pavers

CONTENDERS

(45%-49%)

Blue Inc.
Bon Marche
George at Asda
M&M Direct
Peacocks
Arco
Boohoo.com
Missguided
Snow & rock
Direct Golf
Doc Martens
East
Jimmy Choo
Berghaus

Hackett
Joy
Marisota
Outdoor and Country
Vivienne Westwood
John Lewis
F&F
Monsoon
Hobbs
Jack Wills
Ted Baker
Blacks Outdoors
Bravissimo
Foot Asylum
Lyle & Scott

Phase Eight
Quiz
CC Fashion
Thomas Pink
Brora
Figleaves.com
Route One
Boden
Wynsors World of Shoes

WELL PLACED

(40%-44%)

House of Fraser
River Island
Sports Direct
Austin Reed
Kurt Geiger
Liberty
Jaeger
Jigsaw
Mulberry Company
Radley
Cotton Traders

Edinburgh Woolen Mill
QVC
Toast
Poetry Fashion
Secretsales.com
Yeomans Outdoor Leisure
New Look
Miss Selfridge
Topman
Wallis
Ann Summers

LK Bennett
JoJo Mama Bebe
Long Tall Sally
Pretty Green

ON THE STARTING GRID

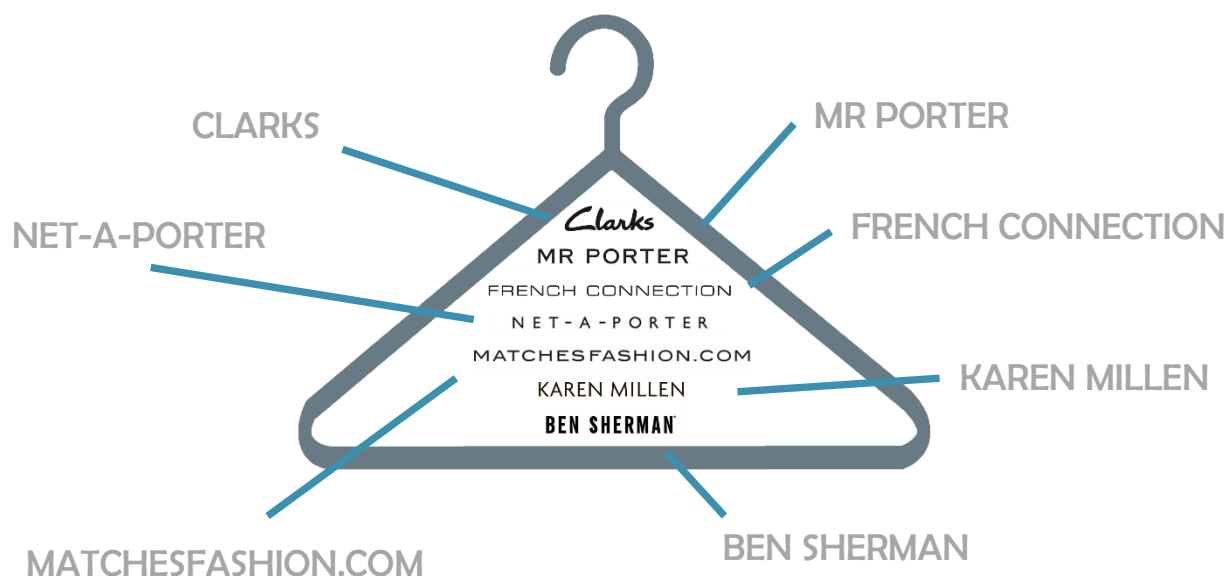
Less than 39%

Evans
Harrods
All Saints
JD Sports

Sportsshoes.com
Lipsy
Dorothy Perkins
Burton

BOTTOM

WHAT MAKES A LEADING BRAND IN RETURNS?



CLARKS

ReBOUND index value: 75%

Not only does Clarks have a longer timescale than the average brand, but it also differentiates between timescales to account for different parts of the world. For example, in the USA, Clarks allows returns up to 90 days after receipt, whereas for the rest of the world, they still offer a very lenient 60 days. They also offer international customers up to four options to return, from returning in-store, to a parcel shop, by post or via courier collection, through the information provided on their six policies tailored by country.

MR PORTER

ReBOUND index value: 73%

Mr Porter excels in offering free returns to their international customers worldwide. This is only offered by four of the top 139 retailers in the benchmark which sends Mr Porter leading the way.

Mr Porter also allows for easy navigation on their site through pretty much any device as they come top of the pack for least number of moves when navigating from the homepage to the returns policy. They also have the added-value of a pop-up screen which details all of their returns policy and process without navigating away from their own site.

Net-A-Porter

ReBOUND index value: 69%

Alongside its male equivalent Mr Porter, Net-A-Porter excels in the same areas when it comes to returning internationally. Free is key for Net-A-Porter, as they offer free worldwide returns alongside only three others in the top 139 UK fashion retailers benchmark.

French Connection

ReBOUND index value: 69%

French Connection ensure customer convenience is at the forefront of their business, as they are one of the only two brands in the top 139 who offer four or more methods of returning internationally, due to their use of brick and mortar store presence around the world, making for easy returns to store as well.

Matchesfashion.com

ReBOUND index value: 69%

Matchesfashion.com have international customers at the heart of their business when it comes to returns, as they have a well optimised site that only entails two swift moves to find the returns policy. This is tailored by each country worldwide which cleverly enables customers from around the globe to follow their own bespoke instructions when beginning their return process which makes for a much better, localised customer experience.

Karen Millen

ReBOUND index value- 67%

Karen Millen offer free returns to three key markets – Australia, New Zealand and the USA, alongside a choice of return methods in the form of postal returns, courier collection and parcel shops. The brand also scores high in ease of navigation, with only one scroll and two clicks from landing page to returns policy.

Ben Sherman

ReBOUND index value- 67%

Ben Sherman soars in the offering of free returns in particular, as they offer free returns to all of Europe apart from Italy. They also ensure they reinforce the message of returns in each of the three stages measured – on the product page, at the basket stage and at checkout.

LET'S TAKE A CLOSER LOOK AT EACH METRIC...

METRIC 1: 'CHOICE OF RETURN METHOD'



Retailers were measured on the choice of return methods offered to customers. This could be through post, courier, parcel shop, locker or in-store. It is more common practice for the brands studied to offer a variety of return options in the UK, but they don't always seem to have the infrastructure for the same approach cross-border.

All brands in this benchmark were ranked in order of how many return methods they offer internationally. In this report we have counted the instruction to send back to UK as a 'method'. It is evident that the most popular method of return that is offered to international shoppers is postal, with courier collection options becoming more popular also.

'CHOICE OF RETURN METHOD' HIGHLIGHTS:

None of the brands offered shoppers the ability to return using a parcel locker.

2 out of 139 (1.4%) retailers offer 4 methods of returning internationally (French Connection and Clarks).

Less than 27% of brands offered international shoppers a choice of how to return their purchases beyond a standard postal return.

'CHOICE OF RETURN METHOD' LEADERBOARD

TOP

4 RETURN
METHODS
OFFERED



Clarks
French Connection

3 RETURN
METHODS
OFFERED



River Island
ASOS
Topman
Karen Millen
The White Company

Harvey Nichols
Missguided
Reiss
Radley
Charles Tyrwhitt

2 RETURN
METHODS
OFFERED



House of Fraser
Topshop
Next
Mr Porter
Net-A-Porter
Office
Selfridges
Burberry
Ellis Brigham Sports
Mulberry Company
Outnet.com
Simply Be
Charles Clinkard

Direct Golf
Jimmy Choo
Matchesfashion.com
Farfetch.com
Hackett
Joseph
Marisota
Pretty Green
Wiggle
Boden
Oasis
M&S

1 RETURN
METHOD
OFFERED



John Lewis
Debenhams
Mothercare
New Look
Schuh
Burton
Evans
F&F
Miss Selfridge
Monsoon
Superdry
Wallis
Ann Summers
Dorothy Perkins
Go Outdoors
Harrods
Hobbs
Jack Wills
Laura Ashley
Mama and Papas
Moss Bros
Sports Direct
Ted Baker
Warehouse Fashion
White Stuff
All Saints
Blacks Outdoors
Blue Inc.
Bon Marche
Coast
Fat Face
George at Asda
JD Sports
Joules Clothing

M&M Direct
Peacocks
Arco
Austin Reed
Boohoo.com
Boux Avenue
Bravissimo
Cath Kidson
Crew Clothing
Dune London
Foot Asylum
Kurt Geiger
Hawes & Curtis
Liberty
Jaeger
Jigsaw
LK Bennet
Lyle & Scott
M&Co
Mint Velvet
Mountain Warehouse
Oliver Bonas
Paul Smith
Phase Eight
Quiz
Rohan
TM Lewin
Snow & rock
Sweaty Betty
Whistles
Agent Provocateur
Ben Sherman
CC Fashion
Cotton Traders

Doc Martens
East
Edinburgh Woolen Mill
Flannels
The Hut
Jacques Vert
JoJo Mama Bebe
Kitbag
Lipsy
Long Tall Sally
Moda in Pelle
Musto
QVC
Thomas Pink
Toast
Bench
Berghaus
Brora
Craghoppers
Fingleaves.com
Fred Perry
Isabella Oliver
Joe Browns
Joy
Outdoor and Country
Pavers
Poetry Fashion
Roman Originals
Route One
Secretsales.com
Sportsshoes.com
Vivienne Westwood
Wynsors World of Shoes
Yeomans Outdoor Leisure

BOTTOM

METRICS 2, 3 & 4: 'EASE OF NAVIGATION'

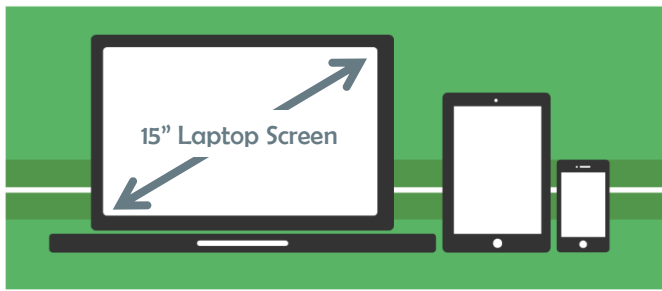


Retailers were assessed on how easy it was to navigate from their homepage to the international returns policy in the fewest possible 'moves'. We defined a 'move' by the number of clicks and scrolls, which were totalled up to an overall figure and ranked in order from fewest to most 'moves'. We considered the fewest number of 'moves' to be a positive attribute due to the importance of reading a returns policy before purchasing. A scroll was only used if the link to the next page was out of the parameters of the laptop screen. We studied this metric across multiple devices to see how the different screen size and layout affected the results. To ensure a fair test, the research was conducted on the same devices for consistency; primary research was conducted on a laptop with a screen size of 15", an iPhone 5s was used to measure mobile and an iPad Mini 2 was used to measure tablet navigation.

The results show it is evident that more work needs to be done in order to fully optimise retailers sites on mobile, as navigation took a lot longer on smaller devices than on a laptop. Ultimately, this had a knock-on effect on the overall retail rankings as brands slipped down the ranking due to poorly optimised sites.

'EASE OF NAVIGATION' HIGHLIGHTS:

- **47** out of **139 (33%)** retailers' policies only take 2 moves to get to from the landing page.
- **1%** of retailers international policies take a big 6 moves to get to from the homepage (Topman and Radley).
- In contrast, only **12%** of retailer's policies take 2 moves to get to from a mobile device.
- **0.7% (1 out of 139)** retailers policies can be navigated to from the homepage in just one move on a tablet device – Flannels clothing.

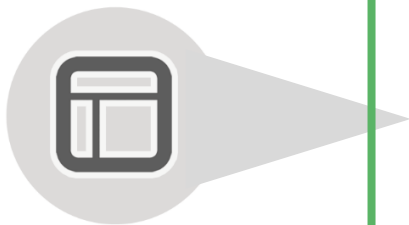


THE BENCHMARK RESULTS FACTOR IN MOBILE DEVICES



TO SEE HOW THE OVERALL RANKINGS DIFFER IF WE EXCLUDE MOBILE AND TABLET DEVICES, CONTACT THE ReBOUNDED TEAM.

SUBMETRIC



LAYOUT/ STRUCTURE

We also delved deeper into the way each policy was structured, but these findings have not affected the overall benchmark results in order to avoid a subjective viewpoint of whether one layout is better than another. This submetric is therefore included as a handy reference point to see how the leading brands display their returns offering. In time, we hope to draw parallels between those who rank highly and the structure in which their policy follows. For example, is the policy numbered, bullet pointed, pulled from a drop-down list, a continuous block of text or in the style of FAQ's? – In this benchmark however, we can draw no direct correlation between the leading brands and a shared structure of return policy to promote any guidelines around best-practice policy layout as this varies too much. However it's worth noting that an FAQ layout seems to lend itself well to return policies which are customised for each country.

'LAYOUT' HIGHLIGHTS:

- **63%** of retailers present their policy in a block of text.
- **8%** of retailers structure their policy in bullet points.
- **11%** of retailers structure their policy in a drop-down format.
- **10%** of retailers structure their policy in FAQ format.
- **8%** of retailers present their policy in a numbered format.

'EASE OF NAVIGATION' LEADERBOARD

TOP

NAVIGATE
IN 2 MOVES



Clarks
Evans
Next
Superdry
French Connection
Go Outdoors
Hobbs
Laura Ashley
Mama and Papas
Moss Bros
Mr Porter
Net-A-Porter
Sports Direct
Ted Baker
White Stuff
Blacks Outdoors
Joules Clothing
The White Company
Cath Kidson
Crew Clothing
Ellis Brigham Sports
Foot Asylum
Harvey Nichols
Hawes & Curtis

M&Co
Outnet.com
Reiss
Rohan
Snow & rock
Whistles
Agent Provocateur
Ben Sherman
Charles Clinkard
Doc Martens
Flannels
The Hut
Jacques Vert
Matchesfashion.com
Craghoppers
Fred Perry
Isabella Oliver
Joe Browns
Joy
Pavers
Vivienne Westwood
Wynsors World of Shoes
Yeomans Outdoor

NAVIGATE
IN 3 MOVES



House of Fraser
John Lewis
Debenhams
Mothercare
New Look
Schuh
Topshop
ASOS
F&F
Miss Selfridge
Monsoon
Jack Wills
Office
Selfridges
Warehouse Fashion
Wiggle
Blue Inc.
Bon Marche
Burberry
Coast
Fat Face

JD Sports
Karen Millen
M&M Direct
Peacocks
Austin Reed
Boux Avenue
Bravissimo
Charles Tyrwhitt
Dune London
Kurt Geiger
Lyle & Scott
Mint Velvet
Oliver Bonas
Phase Eight
Quiz
TM Lewin
Sweaty Betty
CC Fashion
Cotton Traders
Direct Golf
East

Edinburgh Woolen Mill
JoJo Mama Bebe
Kitbag
Long Tall Sally
Moda in Pelle
Musto
Thomas Pink
Toast
Bench
Berghaus
Farfetch.com
Joseph
Marisota
Outdoor and Country
Poetry Fashion
Roman Originals
Route One
Secretsales.com
Sportsshoes.com

NAVIGATE
IN 4 MOVES



M&S
River Island
Burton
Wallis
Ann Summers
Boden
Harrods
All Saints
George at Asda

Arco
Boohoo.com
Liberty
Jaeger
Jigsaw
LK Bennet
Missguided
Mountain Warehouse
Mulberry Company

Oasis
Paul Smith
Simply Be
Jimmy Choo
QVC
Brora
Fingleaves.com
Hackett
Pretty Green

NAVIGATE
IN 5-6 MOVES



Dorothy Perkins
Lipsy

Topman
Radley

BOTTOM

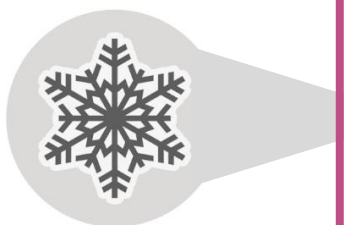
METRIC 5: 'TIMESCALE'



Retailers were measured on the generosity of time period offered to international customers to return their items. This is defined as the length of time advertised by the retailer which dependent on individual policies will be the number of days from the order date, or the date the goods were received. This is typically indicated using number of days as a unit to indicate time period, with a small minority using number of months.

Retailers were ranked in order of timeframe offered to international customers, from longest period to shortest. The longest timeframe was 365 days and was offered by three brands – Boden, Schuh and Wiggle. We are starting to see brands offering different timeframes for customers in different countries to account the added time taken for items to be delivered and shipped back from countries further afield.

SUBMETRIC



SEASONAL ALLOWANCES

Because of the timing of this benchmark in Q1, we were able to add in an extra metric where we measured the seasonal extension of return policies to account for gifting during the Christmas period. Brands were ranked by how long they allowed customers to return, which ranged from the 3rd of January until the end of January. We found that less than half of the brands offered an extended returns policy over the festive period, with only 16% of these allowing returns up until the end of January 2016.

'TIMESCALE' HIGHLIGHTS:

- Only **2%** of retailers offer 365 day returns – these three brands are: Wiggle, Boden and Schuh.
- **37%** of brands offer a returns policy of less than 28 days.
- **4%** of brands include more than one returns policy period timescale in order to account for shipping and delivery times in other countries and further afield – Karen Millen, Next, Brora, Simply Be and Clarks.

'TIMESCALE' LEADERBOARD

TOP

60+ DAYS



Schuh
Wiggle
Boden
Charles Tyrwhitt
George at Asda

John Lewis
Clarks
Hawes & Curtis
TM Lewin

30+ DAYS
(or 1 month+)



M&S
Charles Clinkard
Topshop
Monsoon
Topman
Ann Summers
French Connection
Mama and Papas
Warehouse Fashion
White Stuff
Blue Inc.
Burberry
Fat Face
The White Company

Jigsaw
Mountain Warehouse
Oasis
Radley
Sweaty Betty
Ben Sherman
Kitbag
QVC
Berghaus
Isabella Oliver
Roman Originals
Simply Be
Arco

27+ DAYS



Crew Clothing
Debenhams
Mothercare
New Look
ASOS
F&F
Superdry
Go Outdoors
Jack Wills
Laura Ashley
Moss Bros
Mr Porter
Net-A-Porter
Office
Selfridges
Bon Marche
Coast
Joules Clothing

M&M Direct
Peacocks
Austin Reed
Boux Avenue
Bravissimo
Cath Kidson
Dune London
LK Bennet
Lyle & Scott
M&Co
Mint Velvet
Mulberry Company
Oliver Bonas
Paul Smith
Phase Eight
Whistles
CC Fashion
Direct Golf

East
Edinburgh Woolen Mill
Jacques Vert
Moda in Pelle
Musto
Thomas Pink
Bench
Craghoppers
Fred Perry
Hackett
Outdoor and Country
Matchesfashion.com
Brora
Next
Karen Millen
Fingleaves.com

21+ DAYS



Ellis Brigham Mountain Sports
Snow & rock
Lipsy Joe Browns
Poetry Fashion

14+ DAYS



House of Fraser
River Island
Burton
Evans
Miss Selfridge
Wallis
Dorothy Perkins
Harrods
Hobbs
Sports Direct
Ted Baker
All Saints
Blacks Outdoors
JD Sports
Boohoo.com

Foot Asylum
Harvey Nichols
Kurt Geiger
Liberty
Jaeger
Missguided
Outnet.com
Quiz
Reiss
Rohan
Agent Provocateur
Cotton Traders
Doc Martens
Fiannels
The Hut

Jimmy Choo
JoJo Mama Bebe
Long Tall Sally
Toast
Farfetch.com
Joseph
Joy
Marisota
Pavers
Pretty Green
Route One
Secretsales.com
Sportsshoes.com
Vivienne Westwood
Wynsors World of Shoes

LESS THAN
14 DAYS



Yeomans Outdoor Leisure

BOTTOM

METRIC 6: 'POLICY REMINDER'



Retailers were measured on whether they provided a reminder to the return policy on the product page, the basket stage and at checkout stage to reinforce the returns message as the customer makes their purchase. As a result, we found that the majority of retailers reinforce their returns message on the product pages, but only a small minority follow this through to checkout where the focus is more on the delivery options.

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. Retailers with no policy reminder at all throughout the process were ranked at the bottom in this metric.

'POLICY REMINDER' HIGHLIGHTS:

- **15%** of the top fashion brands do not remind customers of their returns policy and process at any of the three key stages of purchase. (Product page, Basket page and Checkout page).
- **81%** of the top UK fashion brands have a returns policy reminder within each product page, but only **5%** enforced their policy in the basket stage to encourage customers to checkout. And only **2%** of the top brands use a returns policy reminder at the checkout stage.
- Only **3%** of these brands have a returns policy reminder on all three pages measured (Liberty, Quiz, Ben Sherman and Pretty Green).

'POLICY REMINDER' LEADERBOARD

TOP

3 REMINDERS



Liberty Quiz

Ben Sherman
Pretty Green

2 REMINDERS



M&S
Clarks
Topshop
ASOS
Ann Summers
Harrods
Mr Porter
Net-A-Porter
White Stuff
Fat Face
Karen Millen

Crew Clothing
Harvey Nichols
Jaeger
Charles Clinkard
Kitbag
Farfetch.com
Isabella Oliver
Joe Browns
Pavers
Roman Originals

1 REMINDER



House of Fraser
John Lewis
Debenhams
Mothercare
New Look
River Island
Schuh
Burton
Evans
F&F
Miss Selfridge
Monsoon
Superdry
Topman
Wallis
Dorothy Perkins
French Connection
Hobbs
Jack Wills
Laura Ashley
Moss Bros
Office
Selfridges
Sports Direct
Ted Baker
Warehouse Fashion
Wiggle
Blacks Outdoors
Blue Inc.
Bon Marche
Burberry
George at Asda

JD Sports
Joules Clothing
M&M Direct
Peacocks
Arco
Austin Reed
Boohoo.com
Boux Avenue
Charles Tyrwhitt
Dune London
Ellis Brigham Sports
Kurt Geiger
Hawes & Curtis
Jigsaw
LK Bennet
M&Co
Mint Velvet
Missguided
Mountain Warehouse
Oasis
Oliver Bonas
Outnet.com
Paul Smith
Phase Eight
Reiss
Simply Be
Rohan
TM Lewin
Radley
Snow & Rock
Sweaty Betty
Whistles

Agent Provocateur
CC Fashion
Cotton Traders
Doc Martens
East
Flannels
The Hut
Jacques Vert
Jimmy Choo
Lipsy
Long Tall Sally
Matchesfashion.com
Moda in Pelle
Musto
Toast
Bench
Brora
Craghoppers
Figueaves.com
Fred Perry
Joseph
Joy
Marisota
Outdoor and Country
Route One
Secretsales.com
Sportsshoes.com
Vivienne Westwood
Wynsors World of Shoes

NO REMINDERS



Next
Boden
Go Outdoors
Mama and Papas
All Saints
Coast
The White Company
Bravissimo
Cath Kidson
Foot Asylum
Lyle & Scott

Mulberry Company
Direct Golf
Edinburgh Woolen Mill
JoJo Mama Bebe
QVC
Thomas Pink
Berghaus
Hackett
Poetry Fashion
Yeomans Outdoor Leisure

BOTTOM

METRIC 7: 'FREE RETURNS'



Retailers were measured on whether they offered free international returns as common practice. Although there are only a couple of retailers that offer free returns cross-border, a large number offer this when the customer spends over a certain amount of money, or offer a seasonal discount code to allow a free return to be released at checkout. These brands were not indicated as offering free returns in the research due to this not being common practice as part of their policy.

For those who did offer international returns, each brand was ranked in order of how many countries worldwide they offered this incentive to. As a result, we have found that the USA is a popular area where free returns are promoted, which could highlight an urge to sell more across the pond.

'FREE RETURN' HIGHLIGHTS:

- **23%** of the top 139 retailers offer free returns in at least one other international market.
- **3%** offer free returns worldwide (Mr Porter, Net-A-Porter, Burberry and Joseph)
- **16%** of brands offer free returns in the USA (this seems to be an area e-tailers are focusing on)
- **7.9%** of brands offer both free returns and free delivery internationally.

'FREE RETURNS' LEADERBOARD

TOP

FREE RETURNS
WORLDWIDE



Mr Porter
Net-A-Porter

Burberry
Joseph

FREE RETURNS
AVAILABLE IN
10+ COUNTRIES



Jimmy Choo
Mint Velvet
Paul Smith

Selfridges
Outnet.com
Ben Sherman

FREE RETURNS
AVAILABLE IN
2+ COUNTRIES



Dune London
Clarks
Oasis
Matchesfashion.com
Superdry

FREE RETURNS
AVAILABLE IN
1 COUNTRY
(BEYOND UK)



House of Fraser
Topshop
Evans
Next
Topman
French Connection
Joules Clothing

Harvey Nichols
Reiss
TM Lewin
Radley
Sweaty Betty
Farfetch.com

FREE RETURNS ARE
NOT OFFERED TO ANY
INTERNATIONAL MARKETS

Coast
John Lewis
M&S
Debenhams
Mothercare
New Look
River Island
Schuh
Burton
F&F
Miss Selfridge
Monsoon
Wallis
Ann Summers
Boden
Dorothy Perkins
Go Outdoors
Harrods
Hobbs
Jack Wills
Laura Ashley
Mama and Papas
Moss Bros
Office
Sports Direct
Ted Baker
White Stuff
All Saints
Blacks Outdoors
Blue Inc.
Bon Marche
Fat Face
George at Asda
JD Sports
M&M Direct
Peacocks
Arco

The White Company
Austin Reed
Boohoo.com
Boux Avenue
Bravissimo
Cath Kidson
Crew Clothing
Ellis Brigham Mountain Sports
Foot Asylum
Kurt Geiger
Hawes & Curtis
Liberty
Jaeger
Jigsaw
LK Bennet
Lyle & Scott
M&Co
Missguided
Mountain Warehouse
Mulberry Company
Oliver Bonas
Phase Eight
Quiz
Simply Be
Rohan
Snow & rock
Whistles
Agent Provocateur
Charles Clinkard
CC Fashion
Cotton Traders
Direct Golf
Doc Martens
East
Edinburgh Woolen Mill
Flannels
The Hut

Jacques Vert
JoJo Mama Bebe
Kitbag
Lipsy
Long Tall Sally
Moda in Pelle
Musto
QVC
Thomas Pink
Toast
Bench
Berghaus
Brora
Craghoppers
Figleaves.com
Fred Perry
Hackett
Isabella Oliver
Joe Browns
Joy
Marisota
Outdoor and Country
Pavers
Poetry Fashion
Pretty Green
Roman Originals
Route One
Secretsales.com
Sportsshoes.com
Vivienne Westwood
Wynsors World of Shoes
Yeomans Outdoor Leisure

BOTTOM

METRIC 8: 'CUSTOMISED FOR EACH COUNTRY'



Retailers were measured on whether their returns policies are tailored to each market they sell to, or whether they simply issue a blanket policy for international customers. If the retailer has a different returns message for different parts of the world, we have counted how many different markets they directly address. They were then ranked in order of how many different markets their policies address beyond the UK market message (highest number ranking top and lowest number ranking bottom). As part of this research, we ensured that Ireland is classed as “international”.

Again, the USA seems to be an area UK retailers are focusing on as more retailers offering a tailored returns policy for US-based customers than any other market.

'CUSTOMISED FOR EACH COUNTRY' HIGHLIGHTS:

- **Only 1** brand has a tailored returns policy for each country worldwide ([matchesfashion.com](https://www.matchesfashion.com))
- **4%** of brands have 11 or more international policies, tailored by each country
- **19%** have a specific policy tailored to the USA, where it seems the UK retailers seem to be focusing on the most.
- **67%** of the top UK fashion brands simply have a blanket returns policy for their international customers without distinguishing between different markets.

'CUSTOMIZED FOR EACH COUNTRY' LEADERBOARD

TOP

20+ TAILORED
POLICIES



Matchesfashion.com
ASOS

10+ TAILORED
POLICIES



Superdry
Wiggle
Boohoo.com

3+ TAILORED
POLICIES



M&S	Isabella Oliver
John Lewis	French Connection
Missguided	Mr Porter
Clarks	Net-A-Porter
Mountain Warehouse	Ellis Brigham Mountain Sports
Oasis	Reiss
Karen Millen	Charles Tyrwhitt
Paul Smith	Simply Be

2 TAILORED
POLICIES



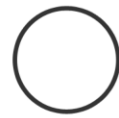
River Island	Warehouse Fashion	Musto
Topshop	Coast	Brora
Evans	Joules Clothing	Farfetch.com
Next	Dune London	Debenhams
Topman	Harvey Nichols	Figleaves.com
Wallis	Mint Velvet	
Boden	TM Lewin	
Office	Radley	
Selfridges	Ben Sherman	

1 TAILORED
POLICY



House of Fraser

BLANKET POLICY FOR ALL
INTERNATIONAL MARKETS
(NO TAILORED POLICIES)



Mothercare	Austin Reed	The Hut
New Look	Boux Avenue	Jacques Vert
Schuh	Cath Kidson	Jimmy Choo
Burton	Crew Clothing	JoJo Mama Bebe
F&F	Foot Asylum	Kitbag
Miss Selfridge	Kurt Geiger	Lipsy
Monsoon	Hawes & Curtis	Long Tall Sally
Ann Summers	Liberty	Moda in Pelle
Dorothy Perkins	Jaeger	QVC
Go Outdoors	Jigsaw	Thomas Pink
Harrods	LK Bennet	Toast
Hobbs	Lyle & Scott	Bench
Jack Wills	M&Co	Berghaus
Laura Ashley	Mulberry Company	Craghoppers
Mama and Papas	Oliver Bonas	Fred Perry
Moss Bros	Outnet.com	Hackett
Sports Direct	Phase Eight	Joe Browns
Ted Baker	Quiz	Joseph
White Stuff	Rohan	Joy
All Saints	Snow & rock	Marisota
Blacks Outdoors	Sweaty Betty	Outdoor and Country
Blue Inc.	Whistles	Pavers
Bon Marche	Agent Provocateur	Poetry Fashion
Burberry	Charles Clinkard	Pretty Green
Fat Face	CC Fashion	Roman Originals
George at Asda	Cotton Traders	Route One
JD Sports	Direct Golf	Secretsales.com
M&M Direct	Doc Martens	Sportsshoes.com
Peacocks	East	Vivienne Westwood
Arco	Edinburgh Woolen Mill	Wynsors World of Shoes
The White Company	Flannels	Yeomans Outdoor Leisure

BOTTOM

We will be refreshing this data each business quarter to keep an eye on the trends and chart which brands are putting more energy into their international returns policies.

So 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 welcome your feedback, so please send any queries, criticisms or suggestions for improvement to research@reboundreturns.com