



shopping  
tomorrow

**Wanted:**

Manager e-commerce fashion

ShoppingTomorrow

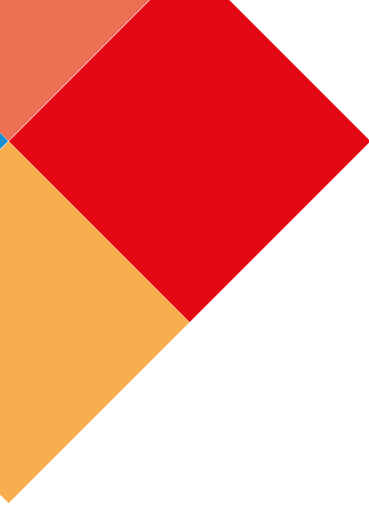
Cross-Border E-commerce Expert group

2018-2019



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## Introduction

Online selling is hot, especially in the fashion industry. E-fashion multi brand platforms such as Zalando, About You, Bestseller and Wehkamp are increasingly growing. Webshops, both pure as well as omnichannel players, are growing continuously. Cross-border selling has become a standard and more and more webshops are expanding across the border. Brick-and-mortar fashion shops are having a hard time. Where online retail is increasing, brick and mortar shops are disappearing from the streets. This enormous growth in e-fashion is creating new chances and new challenges. A handful of questions could be: How are you going to ship all of your orders on time? How will you reach your target group? How are you handling return shipments? This last question, the return problem, is the point of focus.

Almost every single online retailer encounters the return problem. Especially in the fashion industry, the return percentage is traditionally very high. In this toolkit, the opportunities and threats of the return problem will be described and research will be done on the return percentages in the fashion industry (specifically: Women's Fashion). The goal: to provide insight into the importance of a return manager, to tackle the return problem and to further improve the customer experience.

# # 1

## The return problem: the fashion market

The return flow is one of the biggest challenges in e-fashion, a market that is known for its high return percentage. This is because the chances of ordering the wrong product are higher in comparison to many other product categories. Earlier research shows that most common reasons for the return of clothing and shoes can be divided in the following categories: size / fit (70%), quality (31%) and the look & feel (30%). Ordering multiple different sizes of the same product (26%) plays a large role as well.



Most important reasons return



Return percentages in e-fashion

### CONVENIENCE

Return shipments in the fashion industry are often easy and often for free. This increases the importance for fashion brands, sellers and retailers to handle the return problem seriously. Usually, the focus is on simplifying the return procedure for the customer.

Online retailers often offer one or more of the following return options:



#### 1. Label-in-the-box

A return label is attached to the shipping box. Most fashion brands opt for this method, as it is seen as the most easiest return option for the consumer.



#### 2. Drop-off point

A return label is added to the shipping box and can be stuck to the package of delivery. The package can be brought to a drop-off point. It requires some action from the consumer.



#### 3. Online portal

The consumer can register a return shipment via an online portal. However, most portals are not customer-friendly yet. Often a unique code is provided and data for the return shipment is automatically generated.



#### 4. Customer Service

The consumer can register a return shipment via the customer service. For the seller, this option ensures the most control over the return flow, as well as the most data-information.

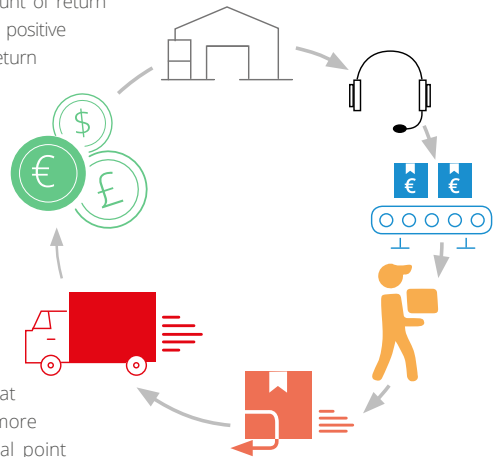


## RETURN PROCESS

The processing of returns is a labour-intensive part of the order process. In comparison: processing a return shipment requires 400 to 500% more handling than the shipment of an order. This means that reducing the amount of return shipments with just 1 percent would have a significant positive influence on the profitability. The costs for processing a return shipment consist of:

- Warehouse costs
- Personnel customer service
- Personnel return processing
- Return shipment
- Transportation of the return shipment
- Financial settlement with the buyer

Other (optional) costs are import duties and VAT, as well as missed sales. Indirect financial costs are the disappointed customer, while the process is the opposite of sustainable. It is important to realise that the handling of cross-border returns becomes even more labour-intensive. Guiding the return shipment to a local point and sending the collected returns in bulk to a central warehouse requires extra processing capacity. However, most cross-border return shipments are often returned individually, which increases costs even more.



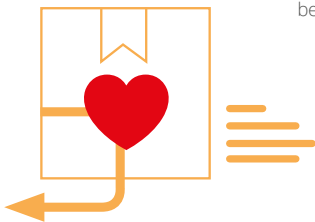


## #2 The market: opportunities and competitors

In the e-fashion industry, return shipments are often seen as a threat. Perhaps it is also a strategic (marketing) chance. Research shows that 22% of consumers hesitate about a purchase when the return procedure is complicated, ambiguous or expensive. A simplified return procedure ensures customer loyalty and loyal customers often return and spend more money. This has a positive influence on the sales growth. Multi brand e-tailers such as Wehkamp, Zalando and About You all offer a simple return procedure, even for cross-border return shipments. The e-fashion industry recognises that its high return percentage is a concern and that the costs are extremely high. However, few companies are willing to compromise on their return procedure, which they want to keep as customer-friendly as possible.


### SUSTAINABILITY


The requirements to make return shipments as sustainable as possible are becoming increasingly higher. This appears when looking at the growth of the group consumers that want to purchase environmentally-friendly. Climate change is a hot topic, especially with Generation Z (+70%). They are the most willing to make a sustainable purchase. Compared to the return process, a lot of thought about sustainability has been put into the shipment process. A flexible return procedure creates the most profits.




Consumers return products less quickly if they receive a longer return period. There are several reasons for this:

- 1 People get attached to the product when they have more time to return it.


- 2 The urgency of returning is lower and more abstract. It is something for the future, something that escapes the consumers' attention.


- 3 Consumers forget that the product can/needs to be returned.

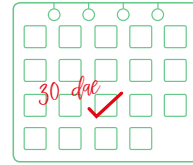




**28%** of the European online shoppers do not take a cross-border purchase into consideration as the return process seems to be complicated and expensive. **67%** of European online shoppers check the return policy before making a purchase. **92%** of online shoppers do not order from a webshop again when the return procedure is difficult.



The number of returned products does not differ much when the return shipment is paid instead of free. However, the average order value is higher when returning is free.



Webshops with a 14 day return policy, have an average return percentage of 47%. This number decreases to 37% when the return period is lengthened to 30 days and even drops down to 25% when the return period is longer than 30 days.

The location of a consumers' residency influences the return pattern as well. Consumers living in the rural areas seem to return fewer products than consumers living in large(r) cities.

### Competition: EU vs. Non-EU

Every competitor has its own strengths and weaknesses. There are some clear differences between European and non-European sellers when we are talking about the selling and returning processes of online products as well.

and include the warehouse costs in the sales price.

- Non-European competitors must pay import duties and VAT levies for delivery to the European consumer. This applies to imports and exports from and to Europe.

'apparent' price advantage. This does not have to be a problem. For example, consider the reason why consumers buy from you. Your brand or product is unique, or not available in another country. Or perhaps it is for a completely different reason, such as a simple return procedure. A return solution as a European seller, with all levies and taxes included in the sales price in combination with free shipping throughout Europe, is often faster and cheaper than that of your non-European competitors. That is even though the return solution is a true conversion killer for cross-border sales of non-European competitors.

### Threshold values and registration

Every brand, retailer and seller pays import duties and VAT levies, when selling products that are made outside of the European Union to European consumers. .

A non-European fashion brand generally sells DAP to Europe, a European seller DDP. The advantage for a European seller is that goods can be shipped throughout the EU without having to pay import duties in every country. A disadvantage is that the selling price seems less competitive. Non-European competitors try to offer an

- Retailers with a warehouse or 3PL (3-party logistics center) in Europe, store their goods there

**DAP:** Delivered At Place. If a non-European seller delivers DAP, he pays all of the costs, excluding European import duties and taxes in the country of delivery.

**DDP:** Delivered Duty Paid. If a non-European seller delivers DDP, he pays all of the costs, including European import duties and taxes in the country of delivery.

DAP initially achieves a much more attractive selling price for non-European vendors, although the European consumer can still be confronted with an unpleasant surprise at the final stage of the delivery. When goods have been imported in bulk, and the import duties and taxes are already paid for, a DDP delivery is possible and the unpleasant surprise at the door can be prevented. However, the selling price is less competitive.

An additional advantage for European sellers are import duties and taxes on returned products from non-European brands. A European consumer can not reclaim the costs that have already been paid for from the cross-border return shipment outside of the EU. This creates a negative customer experience for the consumer.



Non-European retailers that sell B2C cross-border within Europe, must register in every European country to comply with the local European VAT-regulations and threshold values. The European VAT must be paid in the country where the goods have been delivered. As soon as the sales turnover in a European country exceeds the local threshold values for distance sales, the local European VAT must be paid in the relevant European country. In Europe, this varies per country and a salesperson will also have to register in the concerning country.

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**Europe**

Consumers have a 14-day period after delivery in which they can return a product without providing the company with a valid reason for return.



**Germany**

Consumers have a 30-day period after delivery in which they can return a product without providing the company with a valid reason for return.

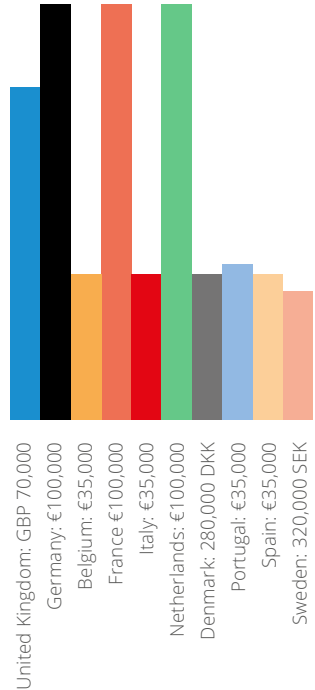


**China**

Consumers have a 7-day period after delivery in which they can return a product without providing the company with a valid reason for return.



**THRESHOLD VALUES IN LOCAL CURRENCY FOR TOP 10 EUROPEAN E-COMMERCE COUNTRIES**



Source: <http://en.macocustoms.com/thresholds-distance-sales-and-e-commerce>

**Exemptions \* per individual shipments:**

- United States: 800 USD  
Per private person, per shipment
  - Canada: 200 CAD  
Per private person, per shipment
  - Australia: 1,000 AUD  
Per private person, per shipment
  - Russia: 1,000 USD  
Per private person, per month
- \* Free of import duties and taxes



### Shipping- and return conditions

Non-European retailers that sell DAP cross-border in Europe often do not have a great return solution, even though this is necessary. In some European countries it is mandatory and laid down in local legislation, to have a return policy.

### Staying ahead

There are lots of duties and VAT challenges for all non-European fashion brands, sellers or retailers who sell cross-border in Europe, which equals profits for you. Communicate clearly to customers that there are no surprises in terms of import duties, taxes and offer them a quick and simple return solution.

Several studies show that a great cross-border return policy has an impact on the purchase decision of the customer. When you sell a lot of volume and most of your customers return for repeat purchases, it is important to have a cost-effective solution for returning and exchanging items without consumers having to reclaim the already-paid-for import duties and taxes. Creating an easy return procedure for consumers will lead to loyal and returning customers and an increased conversion.

### TIPS:



Work with local experts in the country of sales.



Set up a local return address in every country / continent of sales.



Consolidate return shipments and send them back to your warehouse, or partner with a local 3-party-logistics provider to resend items.



Offer a web-based return procedure for cross-border returns.



Make your return procedure as customer-friendly as possible.

# #3

## Analyse

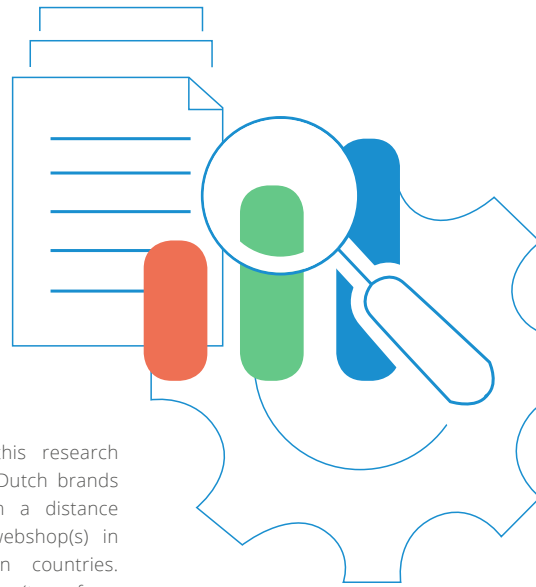
In the first couple of chapters of this research, we painted a picture of the return problem in the e-fashion industry. It was stated how much a simple return procedure is valued by the customer. A great return strategy offers opportunities for sellers, especially in the online retail (of fashion) market where competition is high, domestically as well as internationally.

Creating a solution for the return problem can help to prevent European and non-European competition. In order to better map the return issue, an analysis has been made for Dutch e-fashion brands, retailers and sellers. This analysis provides insight into the number of returns that brands and marketplaces experience. Based on the results of the analysis, advice is given on possible applicable strategies to solve the return issue for your company.

### DATASET

The dataset in this research consist of twelve Dutch brands that all sell from a distance with their own webshop(s) in multiple European countries. Five marketplaces (two from the Netherlands and three from Germany) are taken into account as well. The total dataset exists out of more than nine million sent and returned product lines. In order to create useful information and to work with just one dataset, of some of the supplied data (interesting) information has been disclosed.

This is done in order to be able to carry out a qualitative and quantitative analysis. For the purpose of quality, we have searched for one category that can be well-analysed for brands and marketplaces. This is the following category: "Women's Fashion".



### QUESTIONNAIRE

In the second part of the research, three statements have been proposed to the Dutch (n=932). Through the answers of these statements, we have found out what the average Dutch person finds most important in the return process.



# #4

## Results

In the first part of this research, a quantitative analysis will be carried out to map the amount of return shipments per channel and country. The analysis is based on quantity (pieces), not on profits, within the category Women's Fashion. For the purpose of quality, the dataset's subcategories have been channeled as much as possible. The categories 'underwear' and 'accessories' have been excluded from the analysis.

### RETURN PERCENTAGES

#### Return percentage brands:

The return percentage of brands differs per country. The average return percentage of domestic purchases (the Netherlands) is 40.6%. Purchases made in Germany are returned more often (59.9%), while the other percentages are much lower. On average, the return percentage in all the researched countries is 42.08%.

#### Return percentages brands per country\*:



\*% based on pieces, not on sales value

#### Return percentages marketplaces per country\*:

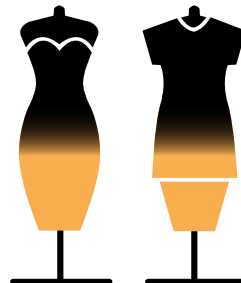


\*% based on pieces, not on sales value

#### Return percentage marketplaces:

Not completely unexpected is that the percentage of returned products on marketplaces is higher than on specific webshops. In the Netherlands, over half of the purchases that have been made on a marketplace are being sent back (54.43%). This counts for purchases from the United Kingdom (56.18%) and Germany (64.01%) as well. On average, 60.3% of the products purchased on marketplaces are being returned. In France and Belgium, these percentages are lower due to a much lower amount of shipped items to these countries.

**50%** of the marketplaces supplied data concerning subcategories within "Women's Fashion". Particularly, dresses and tunics are frequently returned.



## RETURN PERIOD BRANDS\*



14 days: 78%  
15 days: 17%  
30 days: 5%

\*% based on pieces, not on sales value

## MOST GIVEN REASON OF RETURN-SHIPMENT MARKETPLACES\*



Size/Fit: 73%  
Quality: 12%  
Other: 4,5%  
Remaining: 10,5%

\*% based on pieces, not on sales value

## RETURN LABELS

### Return label Brands:

Most brands deliver an order including a return form and a return label (94%). In the other cases, a consumer has to log into his/her webshop account in order to download a return form and label. It is noticeable that, when returning a cross-border order, 20% of the researched brands let their customers register a return shipment in advance. Most brands use the statutory minimum return period of 14 days after reception (78%). Only a few brands opt for a longer period. Usually this is a period of 15 days (17%), with an exception of 30 days (5%).

### Return label Marketplaces:

All marketplaces include a return label for each shipment. 80% sends a return form by standard as well. 75% of the marketplaces require a return reason on the return form. This can be explained by the fact that marketplaces often use a dropship model. Brands ship the packages directly to the customer of the relevant marketplace. The return reason given by consumers most frequently, is "Size/Fit" (73%). This means that the size or fit of the product is not aligned with the image that the customer had. 12% of the customers indicate that the quality of a product is not satisfactory.

## PAY LATER

A widely used payment method in fashion is Pay Later. The hypothesis is that the return percentage of companies offering Pay Later as a payment option, is higher than the return percentage of brands that do not. The analysis shows that 85% of the brands offer the Pay Later-option on their own webshop. 34% of all orders in these webshops are placed with Pay Later. In Germany, this percentage is remarkably higher (66.5%).

When looking at the return numbers, it is noticeable that the average return percentage for these brands is 48% higher than for brands that do not offer this payment method. It must be taken into account that the number of Pay Later-purchases, is 32% higher than other payment methods. 95% of the marketplaces offer the payment method Pay Later. On average, 55% of all marketplace orders use this payment method.

### Return of a product:



## WHAT DOES THE CONSUMER THINK?

Consumers think the ability to return an order easily is especially important. For a cross-border purchase, returning a shipment for free (42%) is particularly important. This is closely followed by a simple return process (41%). It is striking that the long return period scores very low (2%).

Women in particular (40%), are prepared to pay a small contribution (1 euro) if the CO2 emissions of a return shipment can be limited. Men follow at an appropriate distance (30%).

Looking at the age category, there is an interesting difference present. A small contribution of 1 euro is acceptable if this limits the CO2 emissions. However, the willingness is much lower when this amount increases to 2 euros: 15-34 (10%), 35-49 (13%), 50-64 (17%) and 65+ (20%).

People with a lower level of education indicate they are the most willing to make a small contribution (1 euro) to achieve a reduction of CO2 with return shipments. However, if this is 2 euros, they score the lowest by far (8%).

### Limiting CO2 emissions, contribution 1 euro:



### CO2 emission reduction, contribution 2 euro:



### Education, contribution 1 euro: Low:



### Education, contribution 2 euro: Low:

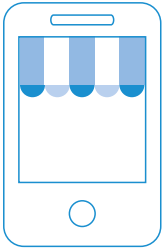




# #5

## Conclusion and discussion

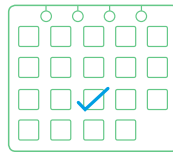
Market knowledge shows the importance of data. Information on the processes and the customer expectations can help solve the return problem. Consider the following aspects:

**Platform:**

Return shipments provide information on the experience of a customer. Investing in the platform helps regarding the size, look and quality of products. Think about 2D and 3D display techniques, digital fitting rooms and interactive customer service.

**Purchase behaviour:**

What kind of customer buys from your webshop? Analysis of data provides insights such as gender, age and cultural differences and influences the online selling strategy.

**The return period:**

Research shows that offering a longer return period has a positive influence on decreasing the amount of return shipments. Buyers have more time to get attached to the product.

**Return methods:**

Which return method is preferred by consumers? A return label in the box, a drop-off point, pick-up at home or drop-off in store? The last option is a direct selling opportunity! Deliveries at drop-off points are economically the most favourable. It requires fewer vehicles in residential areas and less transport in general as well.

The data results from the analysis show that it is difficult to completely exclude return shipments. However, it can be stated that the return problem can be solved in various ways. For the customer, a return shipment is just unavoidable evil. It is up to brands, retailers and sellers to turn this problem into an opportunity. They can improve the customer's experience, using the information provided by the customer with the return shipment.

Both brands and marketplaces have high return numbers in the category Women's Fashion, which makes it easy to focus on one of the following methods: prevention, reduction or marketing of return shipments. Make sure that within the organisation, someone has their focus on this: a return manager.

## ADVICE: HOW TO HANDLE THE RETURN PROBLEM?

A return manager can tackle the return problem in three steps. It is important to make the right choice regarding the goal of the return strategy. Reducing the amount of return shipments requires different considerations other than preventing or marketing the return shipments. The roadmap below gives advice on the handling of the return problem. Pay attention: return percentages differ per product group (such as Women's Fashion). One cannot compare apples and oranges.

### Step 1: Map return shipments

Almost every online entrepreneur takes a look at return shipments, otherwise the return problem would not exist. Analyse:

- How many return shipments do you receive?
  - Through which sales channel and which market do you receive return shipments?
  - What are the total costs of a return shipment?
- Does the return percentage differ from the average return percentage of the market you are active in?

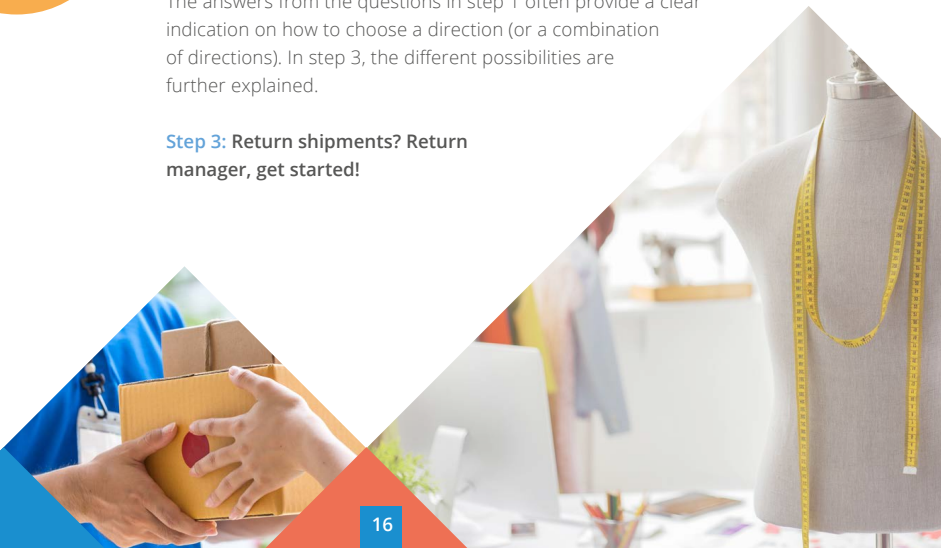
### Step 2: Focus your efforts

After mapping the return flow, a working method can be chosen. What fits in best with your organisation? The prevention, reduction or the marketing of return shipments, or a combination of these?

- Prevention: the goal is to improve the product information on the sales channels in order to better enable the customer to make the right purchase decision.
- Reduction: the goal is to ensure that consumers do not return their shipment.
- Marketing: the goal is to use the return shipment to gain attention for the product or brand.

The answers from the questions in step 1 often provide a clear indication on how to choose a direction (or a combination of directions). In step 3, the different possibilities are further explained.

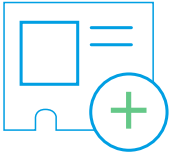
### Step 3: Return shipments? Return manager, get started!





## PREVENTION

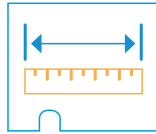
If the goal is to reduce return shipments, it is important to use the collected data to look at where improvements can be made on your platform.



### 1) Improve product information

An example in fashion is information about the fit, if the sizes run smaller/larger and which figure or hair colour fit.

- Offer extensive product information.
- Offer video and footage of the product.
- Use reviews (blogs / vlogs / text).



### 2) Clearly provide information about the product dimensions

Locate different types of sizes (sizes XS-XXL in relation to culturally determined dimensions in for example: the US, the United Kingdom and Asian countries).

- Ensure uniform dimensions in your own product collection.
- Ensure uniform measurements in products worldwide or use a simple calculation model (European S = Asian XL).
- Provide extensive size information, for example: sleeve length, waist- and chest circumference.
- Measure the sizes for your customer by organising measuring days or a 3D popup scan. Brantano is a good example.



### 3) Focus on a specific customer segment, avoid the mass.

A focussed customer segment is more involved and therefore less sensitive to return.

- Positioning brings with it expectations regarding dimensioning. These fit with the offer. For example, Italian cycling clothing is often available in small sizes.

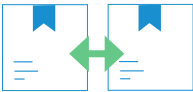


### 4) Personalised customer account

A consumer who can enter his or her body size and preference for clothing into the webshop can be shown a personalised offer. This reduces the chance of return shipments.

## REDUCTION

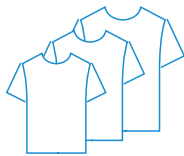
If the goal is to reduce returns, it is important to use collected data to look at where improvements in your return procedure can be achieved.



### 1) Ask for a contribution for return shipments

Charging consumers for a return shipment ensures that the buyer is more aware during the purchasing process.

- Facilitate a (more) conscious choice process for the customer.
- Offer an alternative free shipping method by only accepting returns when delivering a new order.
- The costs for the processing of a return are for the customer, so that the product is ready for sale again.



### 2) Ship more orders at once to limit (return) shipments.

By sending more sizes, the chance of a purchase increases.

- Multiple sizes increase the chance that a product will be bought at the first shipment. However, they also increase the chance of one (instead of multiple) return(s).



### 3) C2C sales

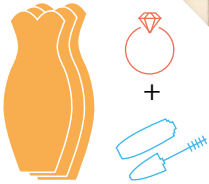
If customers directly resell an order, instead of returning it, the number of returns will be reduced.

- Offer consumers a bonus for such sales (for example, a coupon) to stimulate this option.
- Look at the selling of products through third parties such as [BuyBay](#).



### 4) Complex return procedure

A complex return procedure ensures that consumers put more thought into the returning of the purchase before doing so. A disadvantage may be, that they make a purchase less quickly as well.



**5) Combine 'Pay Later'  
with the stimulation of  
a wider product order.**

By sending more sizes and matching accessories at once, the chances of a sale are higher while the costs of the return shipment stay equal. The chance of receiving just one return shipment is higher.



## MARKETING

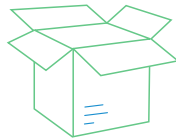
If the goal is to market return shipments, it is important to use collected data to look at how to improve customer loyalty and convert return shipments into selling opportunities.



### 1) Improvement of the product range

Use the data on the return behaviour of consumers to improve the product range.

- Improvement of the product range.
- Increase the chance of a first-time sale.



### 2) Repackaging

With a smart package, a product that has been returned can be repackaged, so that it looks brand new.

- Repacking or refurbishing offers an extra sale opportunity.



### 3) Extra contact moment

The return shipment is an extra moment of contact with the customer.

Information can be collected on:

- Customer wishes regarding the offer.
- Customer wishes regarding shipment and return.



### 4) Reward system

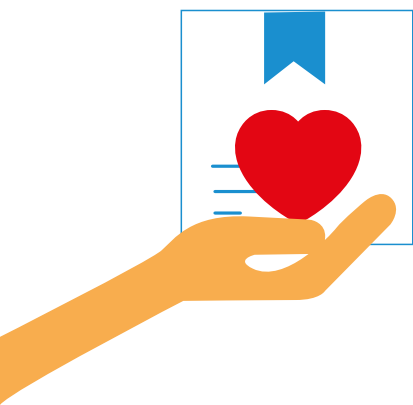
Point out that not using the return procedure can be rewarded, so that customers visit the web shop more often.

- Provide consumers who do not return their order with a discount coupon to encourage them to make a repeat purchase.



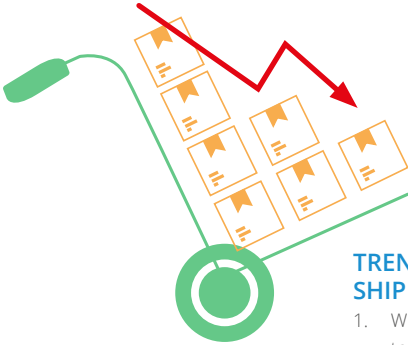
## #6 Trends

The online market is constantly developing and new features are being added to webshops daily. One works better than the other, although they all aim to contribute to the optimisation of sales processes. These kind of developments also help with the return problem.



### TRENDS IN THE PREVENTION OF RETURN SHIPMENTS

1. The digital (3D) mirror (for customers at home) to see how clothing fits without having to try it on, is on the rise.
2. Webshops try to have most details automatically filled out (based on orders from the past).
3. Webshops are increasingly experimenting with adjusting the product range according to the preferences of a previously logged in customer profile.
4. More and more fashion webshops are experimenting with programs that offer a universal physical fit. This allows customers to create a profile based on their size, clothing style and favourite colours. This method helps the online purchasing of fashion items.
5. Brands enter into partnerships to link their clothing dimensions. For example: BALR. L >>> Kenzo L >>> Givenchy M.



## TRENDS IN THE REDUCTION OF RETURN SHIPMENTS

1. Webshops are experimenting with not having an order returned to them, but having it resold through an intermediary in a local sales area. For example, this can be done by sending clothes to a local franchisee.
2. Consolidating (cross-border) return shipments at a local collection point, to ship them - cost savingly - back in bulk to a central warehouse.
3. Carriers invest in environmentally-friendly solutions, such as electric vehicles, cargo bikes and service points.



## TRENDS IN THE MARKETING OF RETURN SHIPMENTS

1. At the customer's request, webshops will send ordered clothes (free of charge) to an acquaintance, leaving behind the required data (size information). This provides the webshop with information on an existing- and a potentially new customer.
2. Target consumers who wear purchased clothes, in order to start a partnership with them as (social) influencer.
3. Webshops are experimenting with the registration of customers who wear ordered clothes and then send them back (wardrobing).
4. Webshops set up the return process at fixed times, possibly combined with returns from other sellers, in order to increase convenience for the consumer and to make their own processing more efficient.
5. Webshops are looking at the possibilities of repacking: frictionless returns. By means of different ways of returning (collection a via sender (for example Picnic)), returning it to a locker (for example at Bruna or Albert Heijn) and reusable packaging that can be adjusted in size to the quantity that is returned. This is positive for the image of your webshop.

## About us

### ABOUT THE CROSS-BORDER E-COMMERCE EXPERT GROUP

The Cross-Border E-commerce Expert group is part of ShoppingTomorrow and focusses on a current problem in cross-border sales every season. This season it had been decided on to investigate the return problem in (cross-border) e-commerce.

### ABOUT SHOPPINGTOMORROW

ShoppingTomorrow is an exclusive and active network that brings e-commerce professionals together and provides insights in the industry. Together we explore and investigate the retail market and contribute to the transformation of B2C and B2B retail. What do future developments mean in terms of business models, the customer journey and technology for employees, companies and 'BV Nederland'? The research platform was initiated in 2013 by Thuiswinkel.org and is now supported by more than twenty Dutch sector- and interest groups.



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**Questions?**

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