zigzag
By Global Blue

Annual Returns Benchmark:

The Cost of Serial Returners in 2024

2024

Contents

Introduction

As ecommerce thrives, a silent crisis of serial returns is eroding retail profit margins like never before. Beyond financial losses, online returns create both operational and sustainability challenges for retailers. Through detailed insights, this Annual Returns Benchmark Report 2024 quantifies the magnitude of this problem and provides critical insights into how to approach the issue as consumer expectations soar. It provides those operating in retail (and related services) with actionable strategies to better manage the rising tide of returns to help protect profitability while strengthening customer relationships.

As customer journeys become more complex and macroeconomic conditions increasingly challenging, 'opportunistic' shopping behaviours have plagued brands whereby shoppers show little hesitation in returning large volumes of goods. These behaviours have partially reshaped the economics of ecommerce, adding margin pressure and operational inefficiencies to retail businesses models.

Serial returners, though representing a minority of all customers, contribute disproportionately to overall return volumes. Their tendency to over-order, coupled with slow return habits, means that a significant number of items are returned past peak sales periods, lowering the chances of resale at full value. This is highly problematic for sectors like fashion where product lifecycles are short. As a result, retailers are now experimenting with measures such as charging for returns to mitigate costs. These new paid returns policies are designed not only to protect margins, but also to discourage 'irresponsible' purchasing behaviour.

Furthermore, there are clear generational divides when it comes to return habits. Younger consumers tend to return items more frequently and are often more concerned with convenience than cost. Conversely, Baby Boomers and Gen

X prioritise simplicity in the returns process but may return less frequently. This generational divergence, coupled with differences by product category, leaves a single solution unfit for purpose. A delicate balance lies in minimising losses while maintaining customer satisfaction. As such, retailers must consider tailoring returns policies based on customer segmentation.

The importance of effective returns management cannot be overstated. With profit margins already strained, understanding which customers are the most profitable – and which drive excessive returns costs – has become crucial.

This report also sheds light on the broader industry trend of embedding sustainability into the returns process. Paid returns, for instance, not only help retailers recover some costs, but also align with consumer awareness about environmental impacts.

Our report is divided into three key sections:
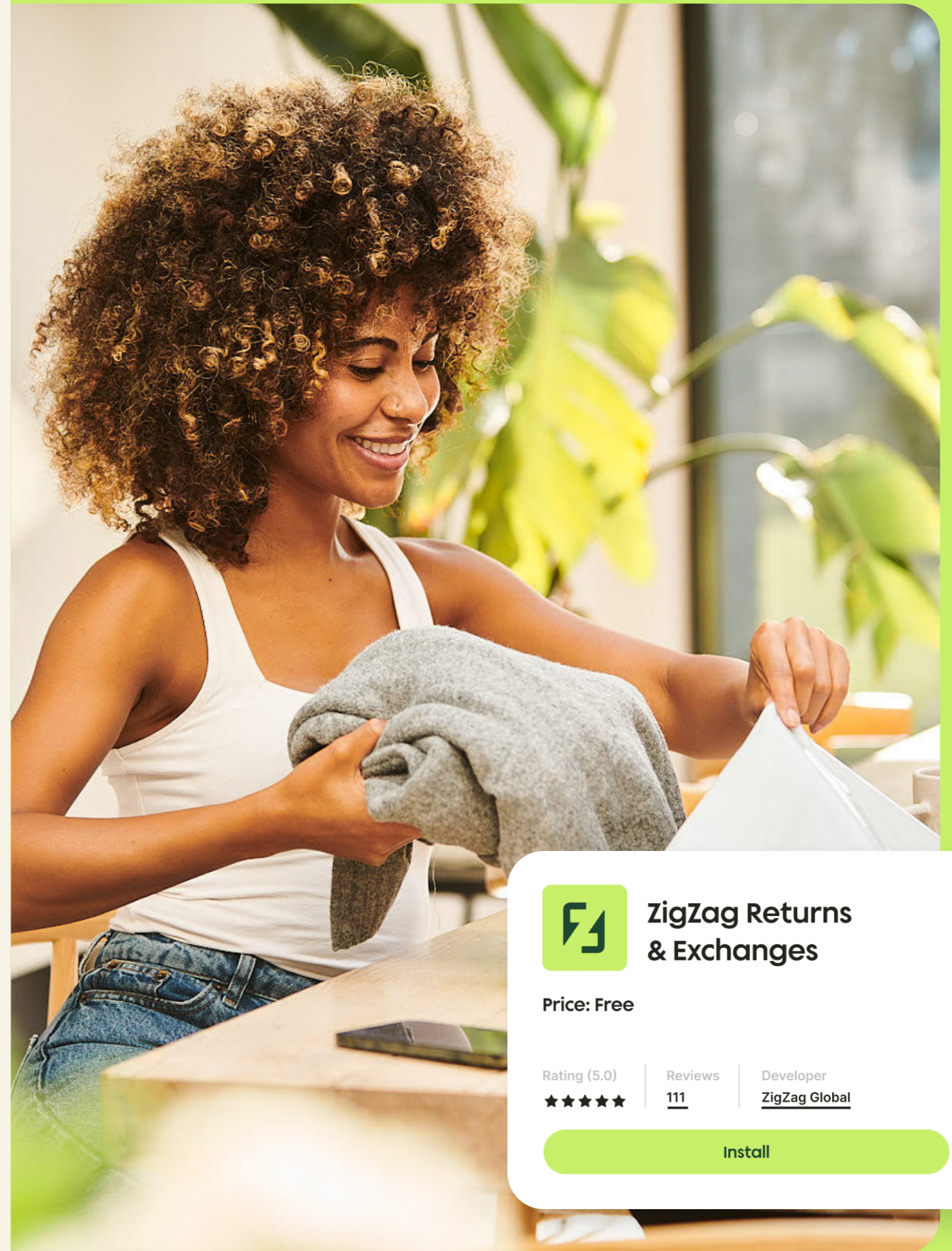
1. Online and the evolution of returns:
An overview of the impact of ecommerce on returns, generational shifts in consumer expectations, and the rise of returners.

2. Quantifying the returns issue:
A data-driven analysis of return values, the relationship between order value and return rates across different product categories, and returner cohorts and their characteristics.

3. The future of returns:
Strategies for addressing returns, including the use of technology, data, and tailored policies to balance customer satisfaction with profitability and sustainability.

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Section 1: Online and the evolution of returns

In recent years, retail has experienced a step change in the way consumers shop. Today, many customer journeys are highly complex. They blend both digital and physical touchpoints at every stage, particularly for non-food products. Total online retail sales in the UK have more than doubled from a little over 10% a decade ago to over 25% today (Fig. 1). For non-food categories like clothing, footwear and homewares, the role of online in conversion is far greater, with the proportion of retail sales made online now accounting for over a half of total non-food sales.

Fig 1: **Online sales represent over a quarter of total UK retail sales today**
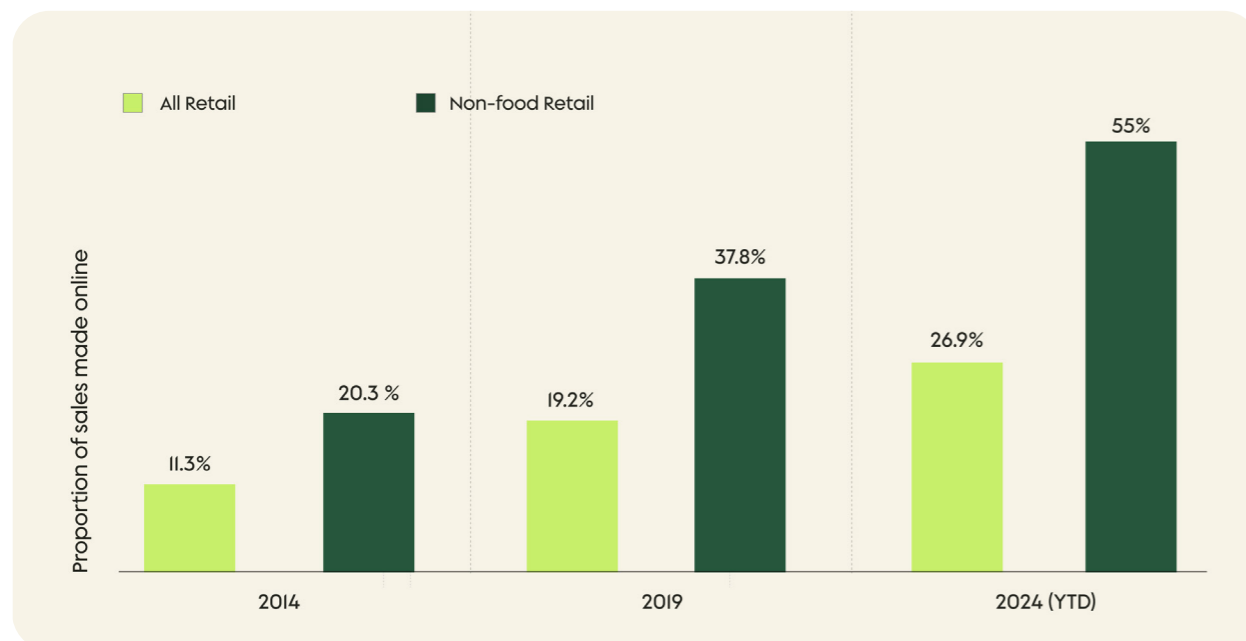
Source: Retail Economics, ONS

Convenience matters in the digital revolution

The rise of digital technology has provided new opportunities for non-food retailers, especially for those able to adapt to the rapid pace of change. However, it has also introduced significant operational challenges as retailers face unprecedented volumes of returns—volumes that were never a concern in single-store operations.

Over the past decade, technology has enabled seamless channel integration with innovative and exciting ways of interacting with consumers across the entire retail ecosystem. Conversely, it has also encouraged 'opportunistic' behaviours among many consumers.

In non-food retail, returns have become a pivotal part of the customer journey, with one in five online purchases now being returned. This significantly impacts both profitability and customer satisfaction.

Our research shows that convenience is the top priority for online shoppers, with two-thirds (66.3%) of respondents rating it as highly important when selecting a return method. The most preferred return method is via Post Offices (28.1%), followed closely by courier collections (27.1%), then returns via convenience stores (16.1%) (Fig. 2).

In 2023, we allowed respondents to select multiple carrier options for their returns, as opposed to just selecting their ultimate favourite this year. But the results showed an eerily similar trend. The order of preference remained exactly the same as last year, with the Post Office being used by 57.7% in first place and Return to a Locker the least (but still significantly) used at 24.1%.

Fig 2: **Shoppers now expect a range of return options**

Q: What would be your preference for returning an item you've bought online?
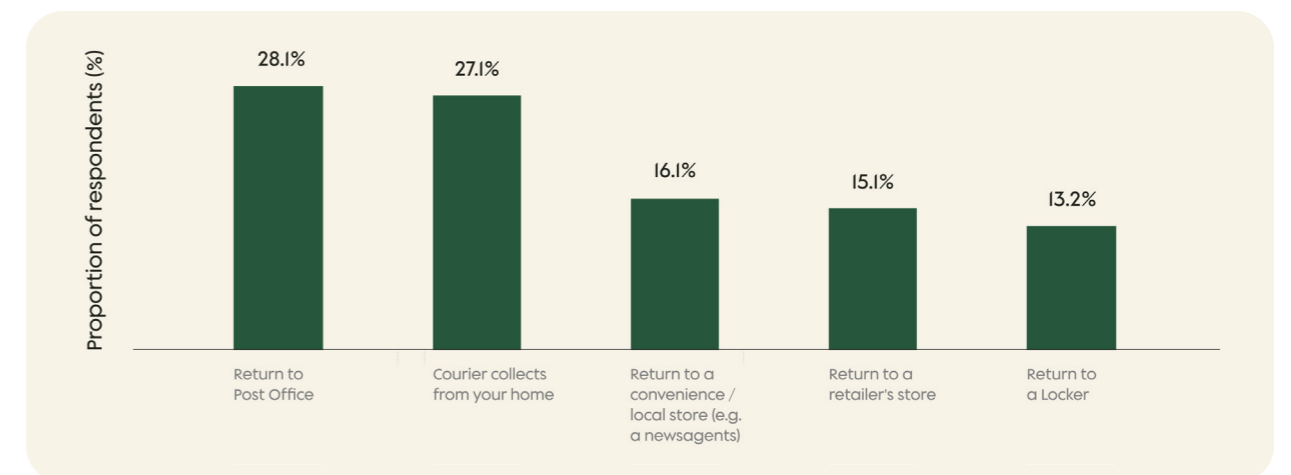
Source: Retail Economics, ZigZag

Sub-optimal returns policies driving 'opportunistic' behaviour

Perceived post-purchase experiences are now shaping pre-purchase decisions. Our survey reveals that eight in ten consumers check returns policies before purchasing online. This underscores just how important flexible returns policies are on purchasing decisions.

However, sub-optimal returns policies are leading to opportunistic and impulsive behaviours, with apparel retailers particularly vulnerable to evolving returns behaviours. ***Three in five online shoppers that make returns have used returns to make or save money,*** behaviours include:

- Using rewards or cashback programs to profit from purchases and returns (18.2%)
- Over-ordering just to reach a minimum spend by purchasing and returning some of the items in your order (16.9%)
- Selling or using items a retailer said to keep after offering to return them (19.8%) – both rising to over a quarter among 18 to 24-year-olds

27%

of shoppers over order on size and colour

Bracketing, wardrobing, and staging

In the clothing and footwear category, 27.4% of shoppers admit to returning items because of over ordering sizes or colours – known as 'bracketing'. This trend is particularly prominent among younger generations. Here, 84.2% of Baby Boomers say they do not engage in this behaviour across any retail category, compared to 31.1% of Gen Z consumers.

In addition, 15.6% have bought clothing or footwear online just to use for a short time like a social event – known as 'wardrobing'; while 14.5% have bought clothing or footwear online to showcase on social media – known as 'staging'.

On top of this, nearly half (46.4%) of Gen Z and a third (35.3%) of Millennials chose a different payment method if they thought they might return an online order. This compares to just 5.5% among Baby Boomers. Payment methods include using digital wallets, buy now and pay later services, gift cards and credit cards when they might not have otherwise.

Retailers addressing financial burden

Managing online returns has become critical for profitability, particularly for those vulnerable to higher return rates. Pure online retailers typically operate with thinner margins compared to multi-channel or brick-and-mortar businesses, driven by different cost structures and the significant expense of reverse logistics—processing, restocking, and transporting returns. These challenges are heightened by online price sensitivity and transparent competition.

To counter these costs, fast fashion brands such as H&M, Zara, and PrettyLittleThing have introduced fees for returning online purchases to discourage returns and offset the associated expenses. The cost of returns varies widely depending on product category, seasonality, and return speed, but is estimated to cost between £10 and £20. This includes postage, packaging, depreciation, labour, and missed sales opportunities.

Striking the right balance between recouping costs versus deterring customers is critical. Nearly half (49.4%) of online shoppers have abandoned purchases due to unfavourable return policies. *Our research indicates that consumers are willing to pay £2 for returns on average, with only minor differences between the least affluent (£1.70) and the most affluent (£2.25) customers.*
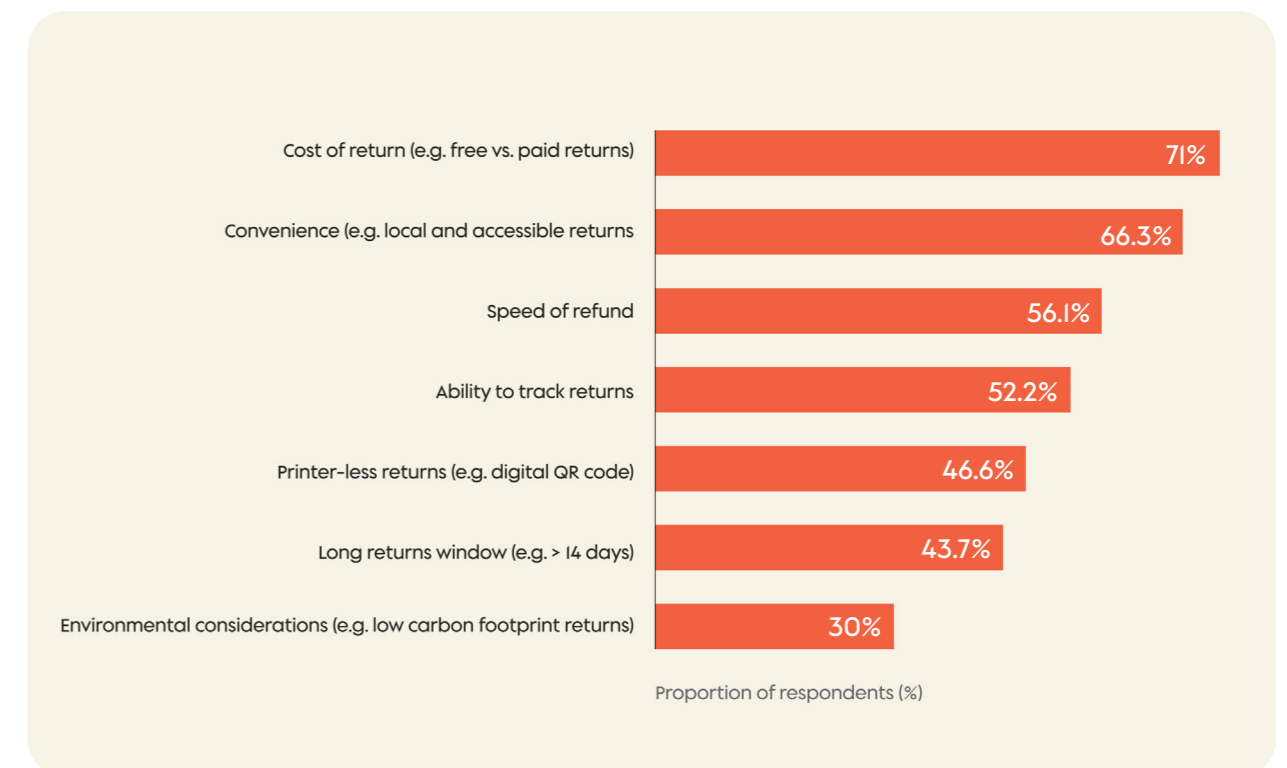
Environmental considerations

At the heart of returns behaviour is inefficiency. It leads to waste and environmental impacts. As the UK transitions to net zero over the next decade, retailers are coming under scrutiny from governments, investors, and consumers to act sustainably. This is particularly evident in the fast fashion industry, where cheap imports and returned items that cannot be resold often go to waste as they fall out of season or trend.

Despite sustainability concerns, only 30.0% of consumers prioritise environmental factors when selecting a returns method, with cost and convenience being dominant factors. In fact, half (49.8%) of shoppers would be discouraged from making environmentally friendly returns if it incurred additional costs, and over a third (34.6%) would avoid it if it required more effort or was less convenient.

Fig 3: Convenience and cost of returns matters most to online shoppers

Q: How important, if at all, are the following factors when choosing a return method for online orders? Proportion of respondents that ranked the following factors high importance.

Factor	Proportion (%)
Cost of return (e.g. free vs. paid returns)	71%
Convenience (e.g. local and accessible returns)	66.3%
Speed of refund	56.1%
Ability to track returns	52.2%
Printer-less returns (e.g. digital QR code)	46.6%
Long returns window (e.g. > 14 days)	43.7%
Environmental considerations (e.g. low carbon footprint returns)	30%

Proportion of respondents (%)

Source: Retail Economics, ZigZag

Section 2: Quantifying the returns issue

As online shopping continues to grow, UK retailers face unprecedented financial and operational challenges that are only compounded by a new wave of serial and slow returners. These 'returners' expect low-cost, long return periods and often return a high proportion of their purchases with minimal consequences. Such behaviours are reshaping the economics of ecommerce, though the true cost of returns is rarely disclosed by retailers.

In this section, we quantify the value of UK returns across non-food retail, using economic modelling and consumer behaviour insights. We examine the relationship between return rates, order values, and consumer segments, as well as how returns vary across product categories.

2.1 Returns values across non-food retail

Online returns have reached a tipping point where retailers are compelled to take action to mitigate impacts. We forecast that online UK returns will tip £27bn in 2024, with online sales across non-food retail climbing to £102bn after returns are accounted for (Fig. 4).

Fig 4: Proportion of online returns forecast to hit £27.3 billion in 2024
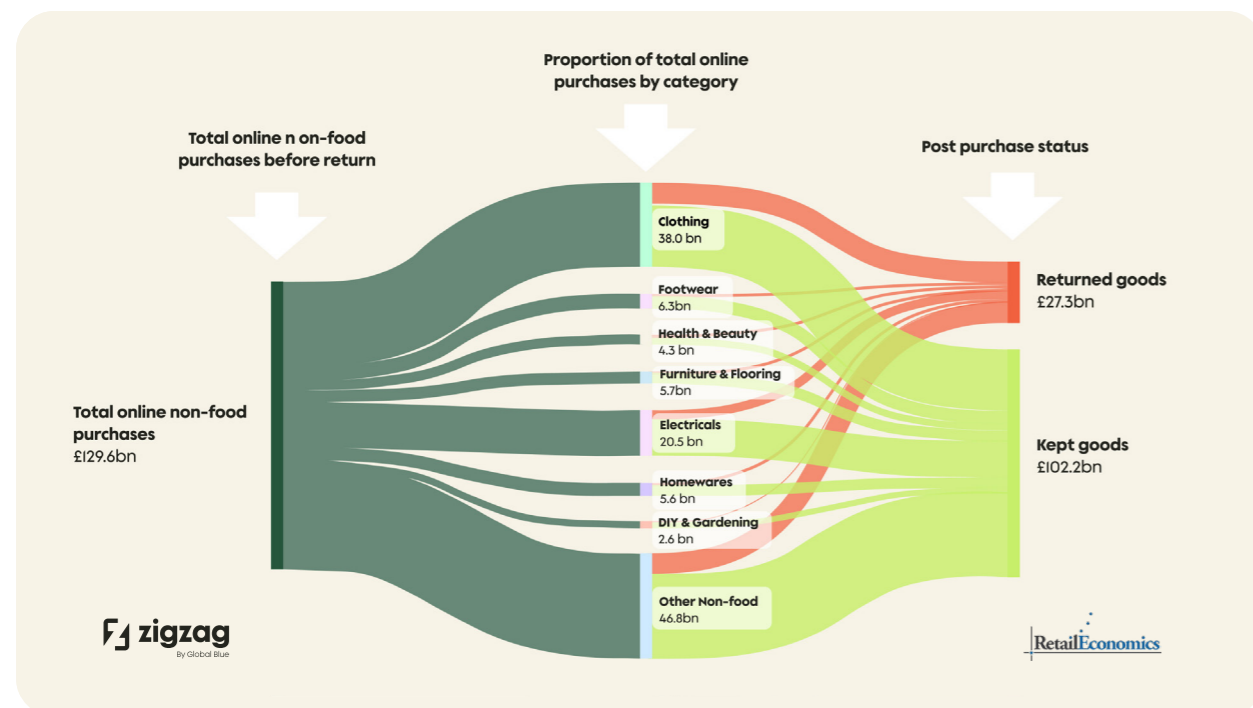
Forecast for 2024 Source: Retail Economics, ONS

The burden of returns is spread unevenly across categories. Clothing, Footwear, and Health & Beauty have the highest return rates, with apparel more likely to suffer product sizing issues; while cosmetics are relatively more likely to suffer from gifting issues.

By comparison, DIY, Electricals, and Furniture & Flooring have relatively low return rates. These categories typically involve infrequent and more considered purchases, where consumers research more widely before buying, reducing the likelihood of returns. Reasons for returns are more concentrated around products being defective or failing to meet expectations (Fig. 5). Here, they tend to be more expensive for retailers to process due to the higher value and logistics involved.

Figure 5: Top reason for making non-food returns by category

Average = across non-food categories. Source: Retail Economics, ZigZag

2.2 Order values vs. return rates

Although the intensity of returns differs by category, our research shows a clear correlation between order value and return rates. Essentially, consumers with larger basket sizes and higher levels of online spend are more likely to return items. Broadly speaking, younger consumers, particularly Gen Z and Millennials, are mostly implicated here.

Fig 6: **Higher value online orders face higher returns**
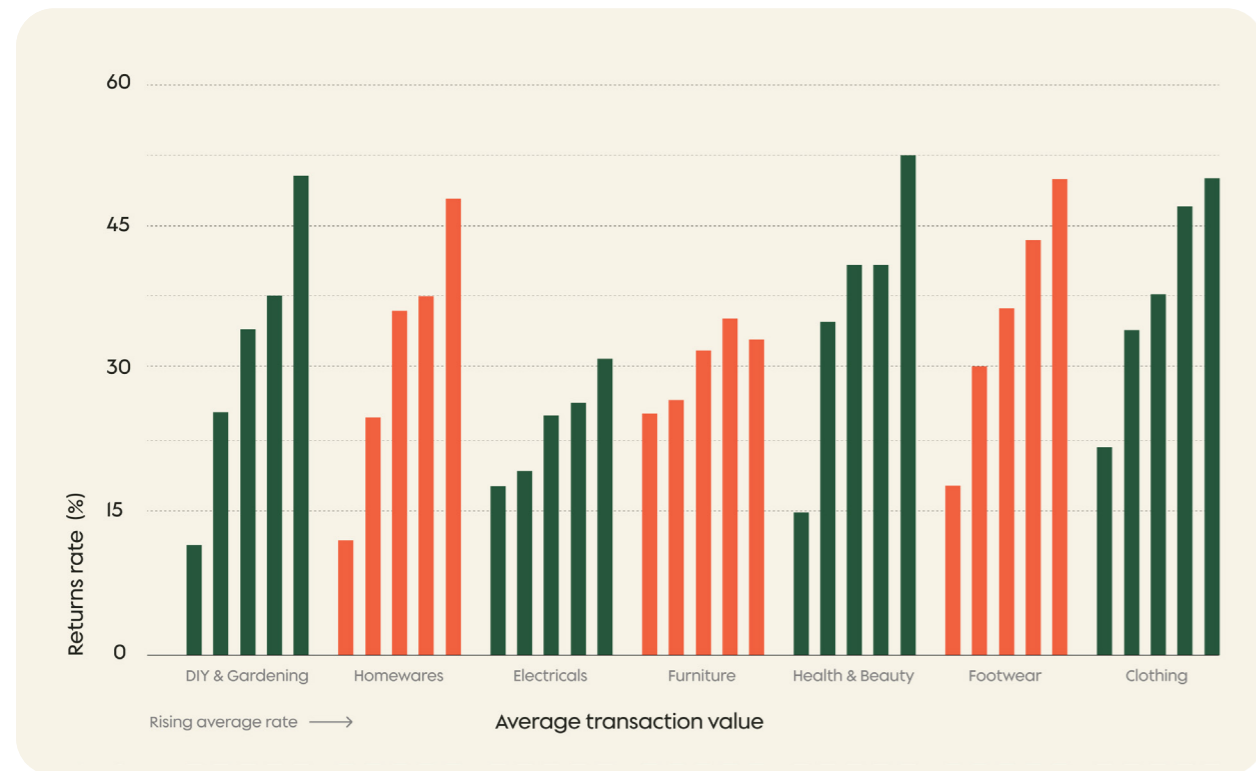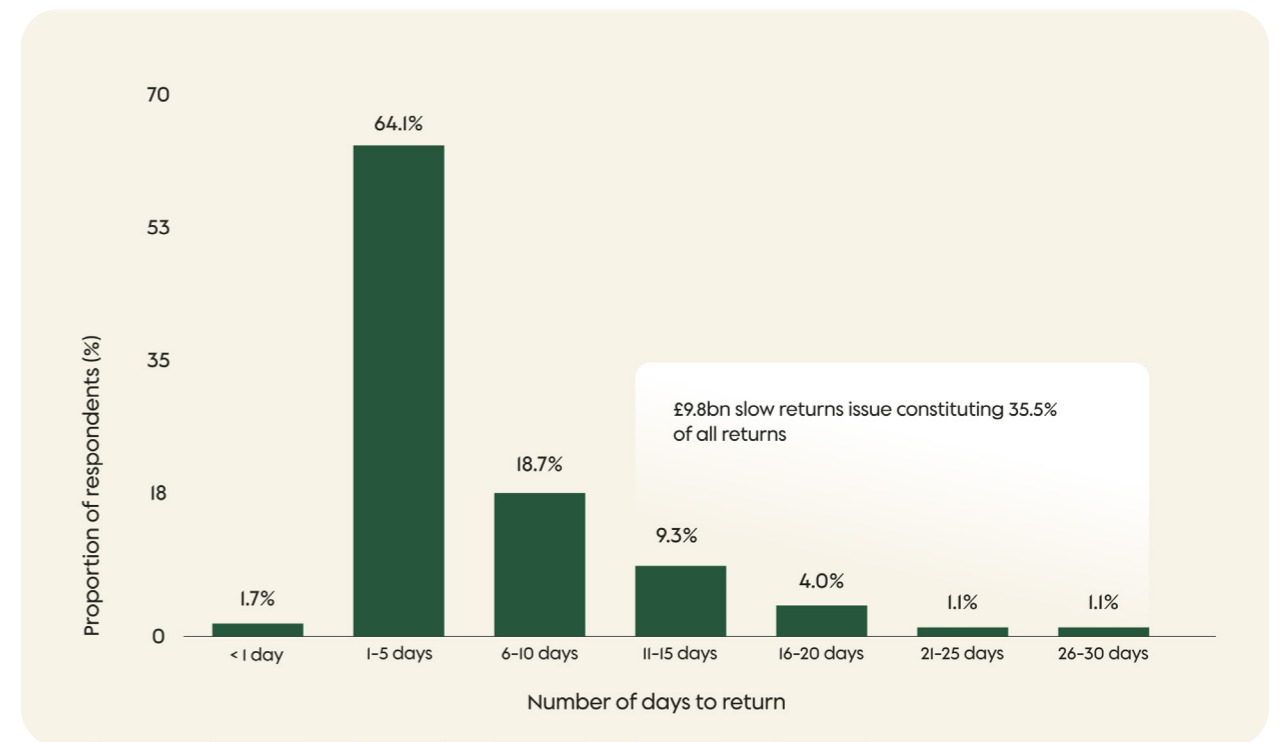

Source: Retail Economics, ZigZag

It's important to note that return rates reflect average consumer behaviour, with variations based on factors like price point, product category (e.g. luxury, discount), and the level of omnichannel support available for considered purchases. However, there is a strong correlation between order values and return rates across categories.

Lower-value items, in particular, see one in three consumers (31.9%) opting not to return them because they are "too low value to bother returning". Online-first shoppers, who make over 70% of their non-food purchases online, are even more likely to avoid returning low-value items, with two in five (40.4%) saying they wouldn't return an item priced below £10.50, compared to the overall mean value of £9.86 across all respondents.

2.3 Delayed returns

The speed at which consumers return goods is critical to reselling items at maximum value. While around two-thirds of consumers return items within five days, 15.5% delay their returns by more than 10 days. This group is forecast to account for £9.8 billion in returns in 2024, making up over 35.5% of all returns. These delays pose significant risks for retailers, especially in fast-paced sectors like fashion, where item values decline if products miss peak sales periods during the returns process (Fig. 7).

Fig 7: **£10 billion of returns taking over 10 days forecast for 2024**

Forecast for 2024. Source: Retail Economics, ZigZag

Generational differences also affect return timings. Gen Z and Millennials take an average of seven days to return items, while Baby Boomers average within four days. Nearly half (46.9%) of Gen Z and Millennials place a high value on longer returns windows when selecting return methods for online orders. Addressing these pain points through streamlined processes and encouraging quicker returns could significantly reduce the risk of inventory obsolescence.

2.4 Returner cohorts and characteristics

A deeper analysis of returner behaviour, based on scale, frequency, and urgency, reveals four main cohorts (Fig. 8).

Fig 8: **Returners can be considered across four key cohorts based on scale andspeed of returns**

Proportion of consumers that make online returns:

Occasional Returners 43%	Efficient Returners 31%	Serial Returners 11%	Slow Returners 11%	Oth 3%

|	**Occasional Returners**	**Efficient Returners**	**Serial Returners**	**Slow Returners**
Impact	Low overall impact on return rates and operational costs.	Minimal disruption to inventory and quicker restocking.	Disproportionately high share of returns, which are often delayed, adding cost and complicating stock management.	Extended return window affects inventory cycles and cash flow.
Characteristics	Rarely returns items unless they fail to meet expectations. This group is the least costly for retailers, as they tend to return fewer items and exhibit less opportunistic behaviour.	Promptly returns items, typically only returning a small percentage. They value a smooth experience and may avoid retailers with complicated return processes.	Frequently over-orders with the intention of returning many items. A third (31.6%) keep items they planned to return after being told by the retailer to keep them, often for resale or personal use.	Tends to delay returns, sometimes for weeks. Nearly a third take advantage of cashback or rewards programs before returning items. They are also more likely to forget about returns or find return locations inconvenient.
Average penetration rate across Non-food	49.7%	53.3%	56.7%	54.5%
Average return rate across Non-food	15%	24%	42%	39%
Share of returns value	22.8%	28.8%	24.2%	21.3%
Generation	Gen Z 20% Millenial 25.3% Gen X 26.1% Baby Boomer 28.6%	Gen Z 24.4% Millenial 25.6% Gen X 25.6% Baby Boomer 24.4%	Gen Z 34.5% Millenial 38.7% Gen X 22% Baby Boomer 4.8%	Gen Z 39.9% Millenial 35.1% Gen X 19.6% Baby Boomer 5.4%
Most important factors in returns experience ranking	1. Cost of return – 76% 2. Convenience (e.g. local and accessible returns) – 73% 3. Speed of refund –58% 4. Ability to track returns –55% 5. Printer-less returns –45%	1. Cost of return – 74% 2. Convenience – 67% 3. Speed of refund -58% 4. Ability to track returns – 53% 5. Printer-less returns – 47%	1. Cost of return – 60% 2. Speed of refund – 55% 3. Long returns window (e.g. more than 14 days after receiving) – 52% 4. Convenience – 51% 5. Printer-less returns –51%	1. Cost of return – 58% 2. Convenience – 58% 3. Long returns window – 51% 4. Ability to track returns – 47% 5. Speed of refund – 46%

Serial and slow returners represent key segments that retailers need to focus on to reduce the impact of returns. Together, these two groups account for nearly a quarter of all returners but generate almost 50% of returns. Serial returners prioritise the speed of refunds, while slow returners value convenience. Both behaviours create significant inefficiencies for retailers.

Despite sharing similarities—such as being more common among younger consumers who shop predominantly online—serial returners tend to make returns more frequently, often with larger baskets and a more deliberate intent. In contrast, slow returners are impulsive buyers, often dealing with buyer's remorse. For serial returners, fast refunds are crucial, while slow returners place a higher priority on convenience.

Fig 9: **Serial and Slow Returners disproportionately weigh on returns**
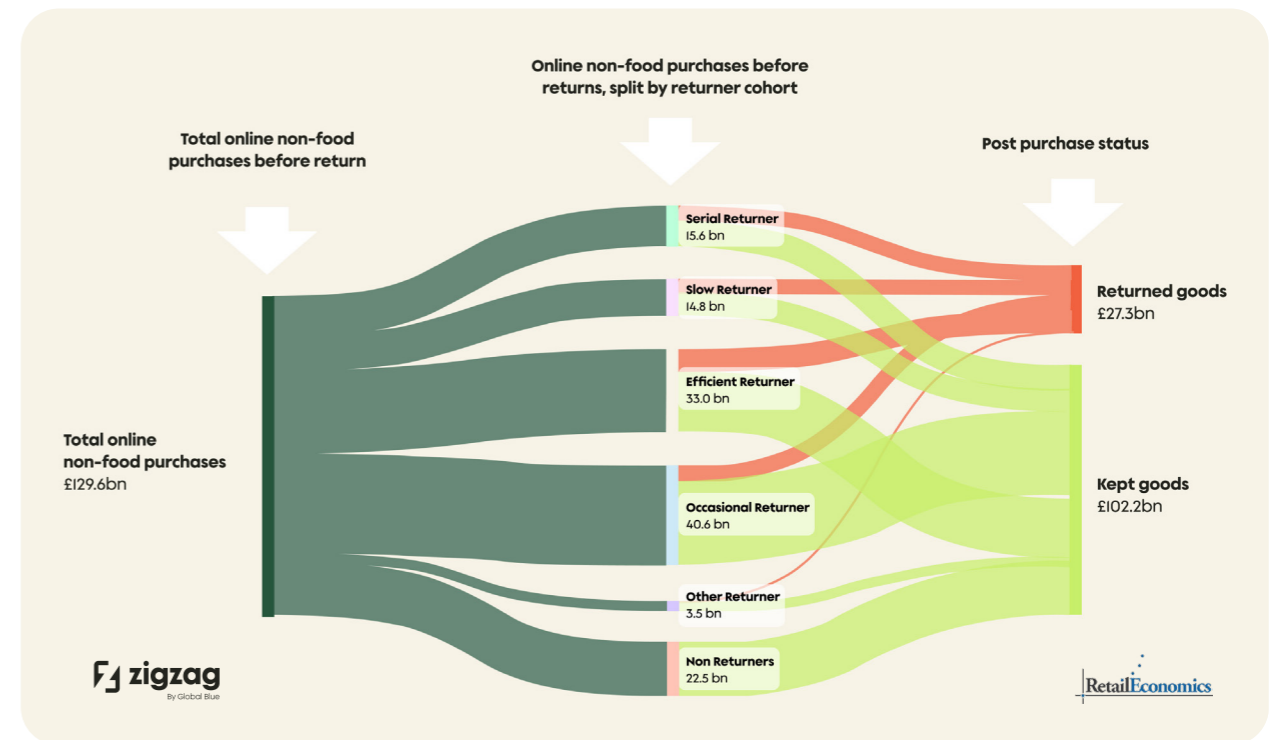
Forecast for 2024. Source: Retail Economics, ZigZag

The frequency and volume of returns from these groups pose challenges for reverse logistics, driving up costs related to restocking, markdowns, and lost sales opportunities. The financial strain is exacerbated by the tolerance serial returners have for poor returns experiences. While most customers may leave a retailer after a bad experience, 44.1% of serial returners would repurchase from a retailer despite poor returns, placing additional pressure on already inefficient systems.

In contrast, only 26.7% and 28.9% of occasional and efficient returners, respectively, would repurchase under similar circumstances. Additionally, serial returners are highly discerning about returns policies, with 68.5% stating they have chosen not to make a purchase due to an unfavourable policy.

While most online returns in the UK are genuine—stemming from issues like damage, unmet expectations, or sizing problems—the reasons vary significantly by category and consumer cohort. Occasional Returners are most likely to send back items that are damaged or fail to meet their expectations. Efficient Returners' reasons align closely with the average consumer. However, Serial Returners, being particularly price-sensitive, tend to over-order and may find better prices post-purchase; whereas Slow Returners exhibit similar behaviours but are more impulsive in their buying decisions (Fig. 10).
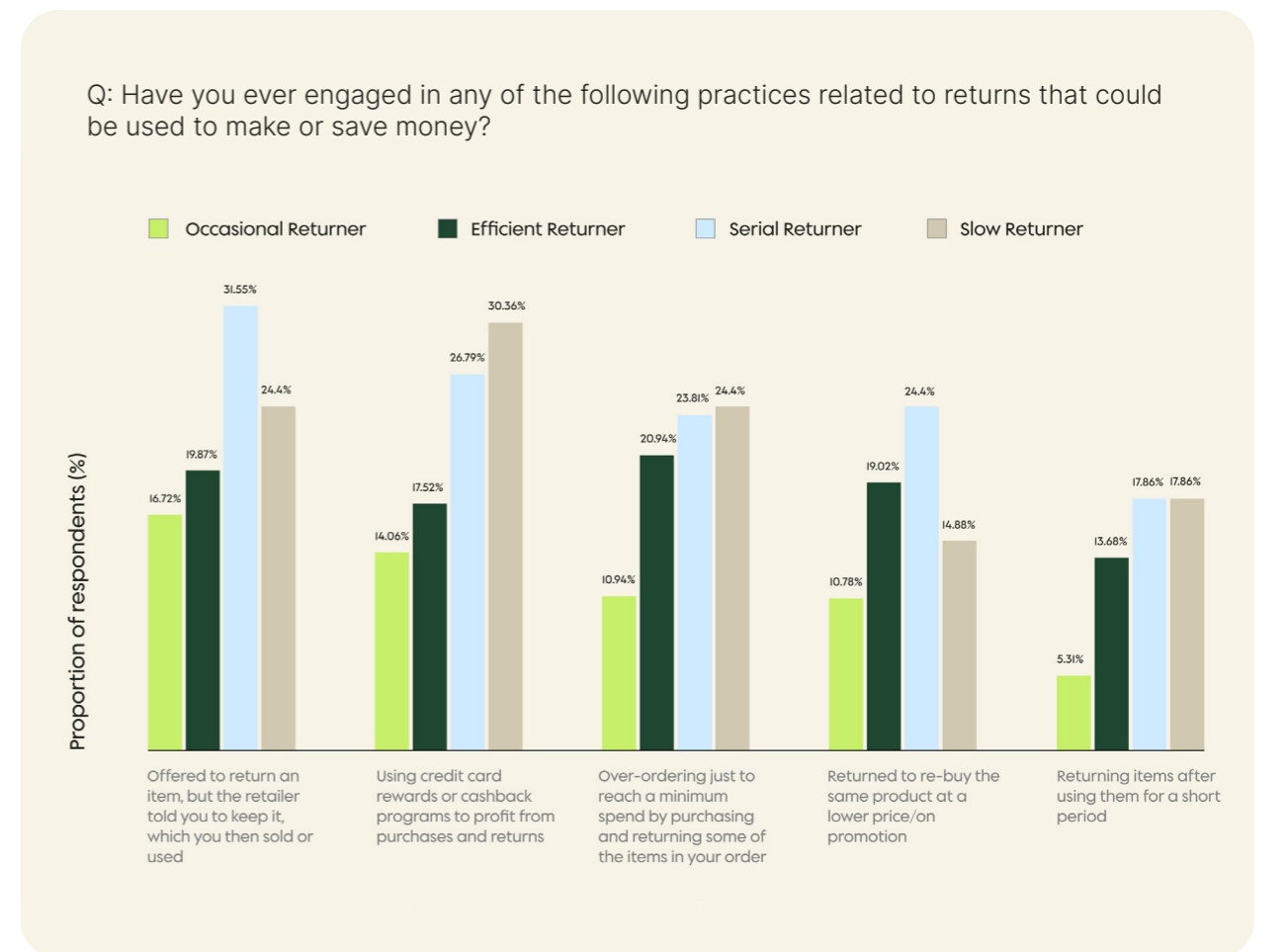
Fig 10: **Top reason for making non-food returns**

Q. What is the most common reason you return items bought online?
Average = across non-food categories.

2.5 Profiting from returns

Different returner cohorts are not just using returns to reverse a purchase, but also as a way to make or save money. Serial Returners are effectively profiting from their activity, with 31.6% keeping items they originally intended to return to resell or use, compared to just 16.7% of Occasional Returners. Additionally, 24.4% of Serial Returners are opportunistic, returning an item to repurchase it at a lower price after a sale.

Slow Returners also exhibit profit-driven behaviours, with nearly a third (30.4%) delaying returns to benefit from rewards or cashback, often holding onto items for weeks to qualify for rebates. Additionally, 24.4% over-order to reach minimum spend thresholds, later returning part of the order. Efficient Returners engage in these cost-saving tactics to a lesser degree than Serial or Slow Returners, but are most likely to aim for minimum spend thresholds when purchasing online.
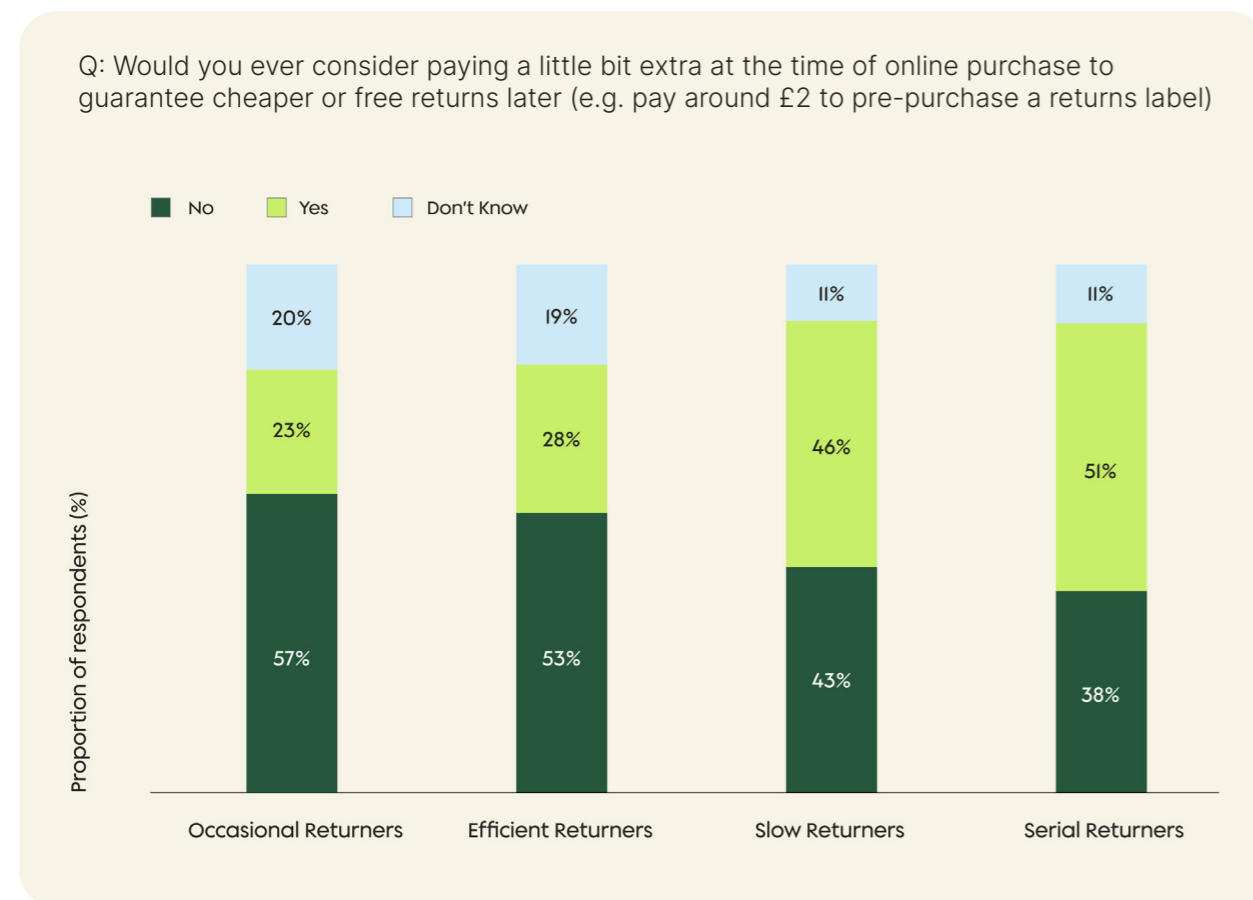
Fig 11: **Making or saving money from returns**

Q: Have you ever engaged in any of the following practices related to returns that could be used to make or save money?

2.6 Discouraging returns varies by cohort

The research shows that there's no single returns policy that will serve as a 'silver bullet' to satisfy all returner cohorts. A nuanced understanding of specific triggers and barriers is essential to effectively target returners through pricing and returns options. Half of consumers would be discouraged from making returns if they had to pay a fee. However, only 33.9% of Serial Returners and 38.1% of Slow Returners would be deterred by this.

Interestingly, factors such as being eligible only for store credit or exchange, rather than a refund, rank more highly among Serial Returners than average (28.1%). While over half (55.2%) of online shoppers are unwilling to pay a small sum at purchase to guarantee cheaper or free returns later, Serial Returners are most open to paying an upfront fee for this benefit (Fig. 12).

Fig 12: Serial returners most likely to pay upfront to reduce returns costs

Q: Would you ever consider paying a little bit extra at the time of online purchase to guarantee cheaper or free returns later (e.g. pay around £2 to pre-purchase a returns label)

Source: Retail Economics, ZigZag

Section 3: The future of returns

The future of returns is rapidly evolving, driven by shifting consumer behaviours, retailer reactions, technology, and the need for more sustainable practices. As online shopping continues to grow, retailers must adopt flexible, strategic approaches to returns management, focusing on profitability, efficiency, and sustainability.

There is no one-size-fits-all solution to address the diverse needs of consumers, particularly with the rise of serial returners and increasing demand for convenience. Retailers must embrace technology, harness data, and offer tailored experiences to manage the complexity of returns effectively. This section explores different approaches and considerations for shaping the future of returns management.

3.1. No one-size-fits-all approach to returns policies

Returns management is about more than just recovering costs. It involves balancing operational efficiency with customer satisfaction. The challenge for many retailers is that there is no universal solution. However there are certain approaches that can be explored:

Tiering: Different consumer groups have distinct behaviours and preferences, requiring a segmented, tiered approach to returns policies. Retailers should categorise customers based on factors like return frequency, order value, and purchasing habits. For example, serial returners—those who frequently over-order and return significant portions—may require stricter policies, such as limiting free returns or offering store credits rather than refunds.

Incentivising: Incentivising positive return behaviours is another effective strategy. Tailored policies can reward efficient returners, who rarely make returns and tend to be loyal customers, with free returns or perks such as discounts for opting for store credits.

Managing expectations: Retailers should manage perceptions carefully, ensuring that returns policies are convenient and not overly punitive, while also promoting transparency about the financial and environmental impacts of returns.

50% of consumers would be discouraged from making returns if they had to pay a fee.

3.2. Understand your customers

Customer insight into why items are being returned can lead to powerful solutions that can be put in place to pre-empt problems and reduce overall returns rates.

Support shoppers: Reducing return rates starts with understanding why customers return items. Retailers need to analyse patterns in purchasing and returns behaviour, using these insights to address the key triggers for returns, such as size issues, product quality, or unmet expectations. By investing in pre-purchase enhancements, such as size guides, product reviews, and customer support, retailers can prevent many returns before they happen.

Leveraging data for targeted strategies: Data analysis is critical in this process. Retailers can use data to create targeted strategies for different customer segments. Serial Returners may benefit from more guided purchasing experiences, like size recommendations or real-time customer support, while Efficient Returners can be encouraged with clear return windows and hassle-free return processes.

3.3. Embedding technology into returns management

In recent years, the explosion of technology like AI, coupled with advances in data science and data harvesting has created a step-change in the way complex problems are tackled and solutions derived. Partnerships with specialised 3PL companies that are leveraging this technology can greatly reduce inefficiencies and accelerate stock back into the supply chain.

Leveraging technology for fit and convenience: Fit is a key challenge in reducing returns, especially in clothing and footwear. Technologies like virtual try-ons and augmented reality fitting rooms are helping to address this issue, particularly for younger shoppers, who increasingly use these tools to make more informed choices. Product videos and live-stream shopping also offer customers a closer view of products, reducing post-purchase disappointment.

Tracking and automating returns: Technological advancements are also improving the logistics of returns. RFID technology and unique product IDs help track the return journey of individual items; reducing the chances of lost or misplaced returns, enabling more accurate inventory management and allowing retailers to attribute a cost to that individual item. Automation is playing a critical role in streamlining the returns process—automated return systems can drastically cut down on manual labour, ensuring faster processing times and lower operational costs.

Data-driven insights and machine learning: Machine learning is now being used to predict returns by analysing historical data, customer behaviour, and product features. This helps retailers identify items likely to be returned, allowing them to improve product descriptions, sizing, or marketing to minimise returns. Predictive modelling is proving invaluable in cutting down the financial impact of high return volumes.

Partnerships for end-to-end returns management: Many retailers are outsourcing returns to third-party logistics providers for a more seamless and efficient operation. This shift, accelerated by the pandemic, allows businesses to scale returns management while reducing internal costs, ensuring a better customer experience.

Bridging online and offline channels: Physical stores are playing a key role in returns, offering in-person options that help reduce reverse logistics costs. For example, Shoe Zone incentivises customers to return online purchases in-store, saving on fragmented delivery costs while providing opportunities to upsell with same-day refunds.

3.4. Education and sustainability

Lastly, the role of education to help consumers deeply understand the impact of returns from a sustainability point of view, can partially influence behavioural changes.

Educating consumers on sustainability: As sustainability becomes a key concern for consumers, retailers need to integrate environmental considerations into their returns strategies. By educating consumers on the carbon footprint of returns during the checkout process, retailers can offer more eco-friendly return options, such as consolidated shipping or encouraging in-store returns to reduce environmental impact.

Exploring the circular economy: In addition to reducing returns, retailers should embrace the circular economy by offering services that refurbish and resell returned items. Encouraging customers to resell or recycle products through their own channels or third-party marketplaces can significantly reduce waste and promote sustainable practices. This approach not only helps retailers reduce the financial burden of returns, but also aligns with growing consumer demand for environmentally responsible retail options. Additionally, returner behaviours such as staging and wardrobing can be considered 'informal borrowing', whereby offering access through rental services may be an appropriate solution for certain products and missions.

24% of returns are generated by just 11% of customers (serial returners)

Conclusion

Online returns are becoming a serious threat to retail profitability as ecommerce continues to thrive amidst the march towards a hyper-connected retail environment. Our research reveals that while serial and slow returners make up only a quarter of all returners, they account for nearly 50% of total returns, placing a significant financial strain on retailers. This behaviour, marked by over-ordering, delayed returns, and intentional bracketing, significantly erodes profitability and threatens operational efficiency. Many retailers can no longer afford to overlook this.

Key findings from the report highlight the need for retailers to adopt tailored returns strategies. Serial returners, who prioritise convenience and long return windows, require more stringent policies such as charging for returns or limiting refund options. On the other hand, efficient and occasional returners, who rarely engage in opportunistic return behaviours, should be incentivised with free returns and rewards to encourage loyalty and minimise returns. Moreover, the importance of speed in returns was emphasised, with delayed returns leading to inventory obsolescence and missed sales opportunities.

To thrive in this evolving landscape, retailers must integrate technology, leverage data analytics, and customise returns policies based on consumer cohorts and sophisticated segmentation. By doing so, businesses can streamline operations, reduce costs, and enhance customer satisfaction, ensuring long-term profitability and sustainability in the competitive world of ecommerce.

Methodology
Consumer surveys were undertaken in August 2024 to include answers from a sample of 2,000 nationally representative UK households. Economic modelling and retail sales forecasts are based on proprietary Retail Economics data and official national statistics.

Serial and slow returners account for **50%** of total returns

About ZigZag

ZigZag is a software solution to help eCommerce retailers manage returns domestically and globally. The ZigZag platform connects major retailers to a global network of over 200 warehouses and 1,500+ carrier services in over 170+ countries. ZigZag's clients include Selfridges, Frasers Group, Boden, New Look, Puma, The Hut Group, and many more.

ZigZag delivers best-in-class technology and service to transform the post-purchase and returns experience globally. ZigZag's mission is to reduce cost and waste, increase customer loyalty, and enable our clients to be more profitable and sustainable.

ZigZag has continually been awarded for its innovation and data winning 15 awards since 2019, including Tech Innovator of the Year at the prestigious Drapers Awards 2023 and 3 awards in 2024. ZigZag is also proud to be a member of the Ellen MacArthur Foundation.

Learn more about ZigZag at **www.zigzag.global**

About Retail Economics

Retail Economics is an independent economics research consultancy focused on the consumer and retail industry. We analyse the complex retail economic landscape and draw out actionable insight for our clients. Leveraging our own proprietary retail data and applying rigorous economic analysis, we transform information into points of action.

Our service provides unbiased research and analysis on the key economic and social drivers behind the retail sector, helping to inform critical business decisions, giving you a competitive edge through deeper insights.