



FOR IMMEDIATE RELEASE

Vertex Commerce Study: Returnary's Growing Complexity Forces Retailers to Keep Pace

Global tax technology provider finds retail consumers want free, easy product returns -- or they'll shop elsewhere to find them

King of Prussia, PA – March 26, 2025 – Vertex Inc. (NASDAQ:VERX) (“Vertex” or the “Company”), a global provider of indirect tax technology solutions, reveals that while free, easy product returns are paramount for consumer loyalty, they also create significant indirect tax complexities for retailers managing a surge of returns. Data from the post-holiday ‘Returnary’ season – spanning late December through early February – shows that the majority (81%) of consumers would rather keep an item or seek out a nearby store to complete a return than pay for return shipping. With free returns a clear consumer expectation, 68% of shoppers indicate that their return experience directly influences their decision to engage with a brand in the future—all of which adds to the indirect tax complexities retailers must navigate.

Retailers must accurately refund sales tax collected at the time of purchase, which varies by jurisdiction and sales channel. With the influx of return transactions, it can quickly become difficult to track and manage tax reporting, especially if the retailer is using disconnected systems that increase the likelihood of errors and compliance issues.

With so many variables to manage within sales tax rates and regulations, retailers must rely on automated tax determination engines to successfully navigate high-pressure, high-volume seasons. These solutions are critical for ensuring accurate tax reporting and compliance during both peak shopping and return periods.

"Retailers have little time to recover between the holiday shopping surge and the post-peak return influx, making it crucial to avoid discovering the wrong tax configuration at this critical moment," said Sal Visca, Chief Technology Officer. "Adopting an integrated, modern, and unified tax approach ahead of these major retail moments is critical to reducing complexities, accurately tracking taxes, and meeting business and consumer needs."

The survey finds that 40% of consumers return at least one item post-holiday, ranging from \$25-\$100, and 55% are ensuring the sales tax is refunded accurately. [Vertex research](#) finds a majority (77%) of holiday transactions are processed online yet about 60% of these returns are processed in-store. Retailers have spent the past decade navigating digital transformation to address the complexities of omnichannel commerce. During this time, rising consumer expectations for seamless “buy anywhere, return anywhere” experiences have introduced additional challenges in managing omnichannel returns while ensuring accurate indirect tax calculation, management and reconciliation.

Vertex’s survey also finds that nearly one-third (35%) of consumers make a purchase with the intent to return one or more items. When there is more time between the original purchase date and the return, it widens the window for tax rates to change and requires retailers to maintain historical rate information.

To learn more about Vertex and its indirect tax and compliance solutions for ecommerce and more, visit www.vertexinc.com.

About the Survey

This survey was conducted via Dynata and polled 1,000 general U.S.-based consumers over 18 years of age in February 2025. Respondents were segmented and analyzed across age groups, gender, marital status, having children and household income. For complete survey methodology, please email vertex@pancomm.com.

About Vertex

Vertex, Inc. is a leading global provider of indirect tax solutions. The Company's mission is to deliver the most trusted tax technology enabling global businesses to transact, comply and grow with confidence. Vertex provides solutions that can be tailored to specific industries for major lines of indirect tax, including sales and consumer use, value added and payroll. Headquartered in North America, and with offices in South America and Europe, Vertex empowers the world's leading brands to simplify the complexity of continuous compliance.

For more information, visit www.vertexinc.com or follow us on [Twitter](#) and [LinkedIn](#).

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