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The supply chain behind the digital experience: Deloitte's omnichannel clienteling study

Contents

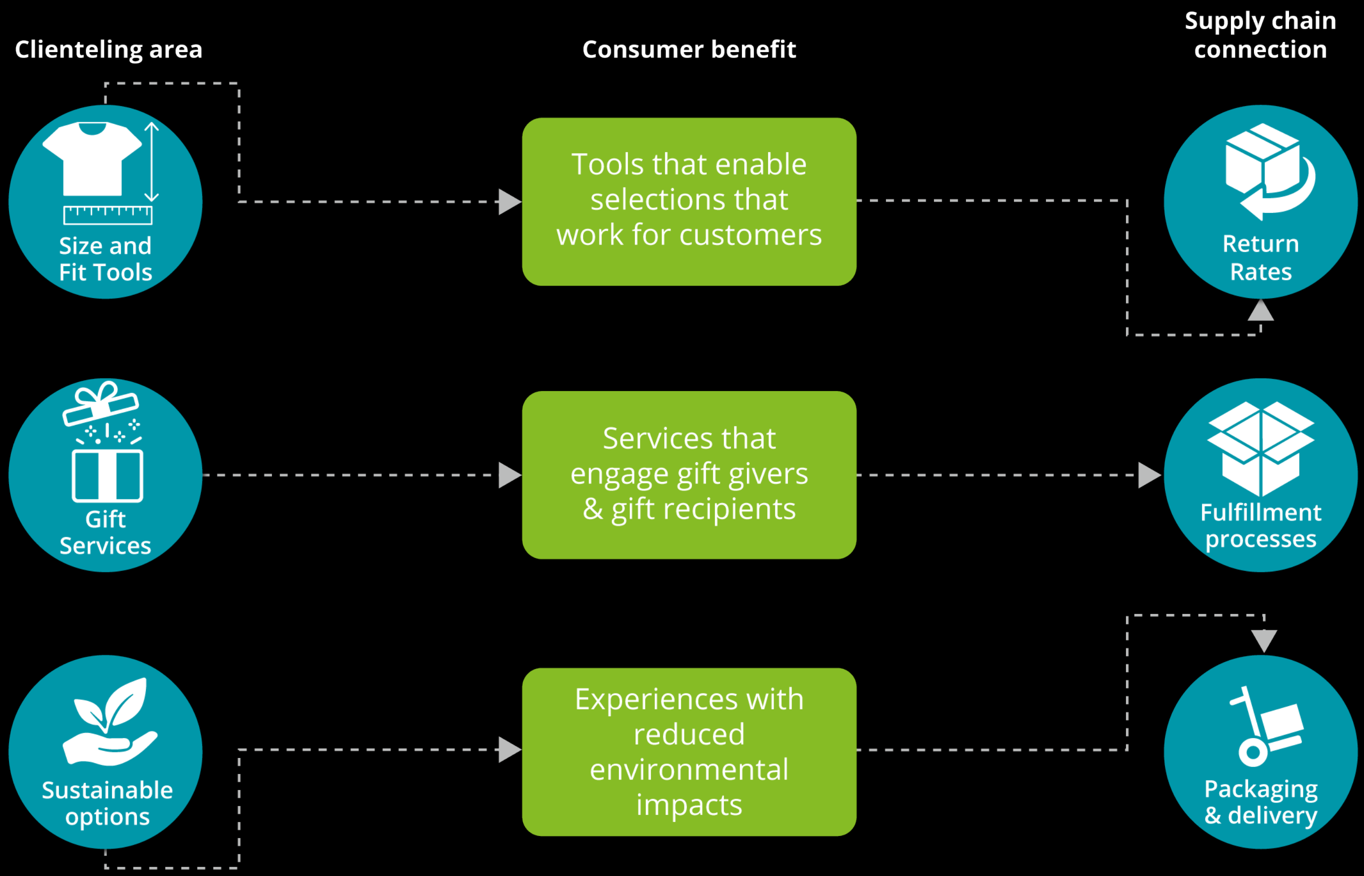
Executive summary

Deloitte's research of more than 300 retail companies found that online clienteling—often viewed primarily as a marketing function—has direct dependencies on post-purchase supply chain capabilities. In particular, the clienteling service areas consistently link the customer experience to operational execution: size & fit prediction tools, gift services, and sustainable delivery options.

Each area shapes the customer's post-purchase experience in a unique way. Size and fit tools can reduce the likelihood of a return. Gift services) can elevate the experience for both the purchaser and the recipient and can reduce the need for additional support. Sustainable delivery options can reduce material waste for consumers and reinforce a brand's sustainability image.

To deliver these services successfully, companies need collaboration across marketing, digital, and supply chain operations. When that collaboration is in place, organizations can capture the marketing upside of differentiated, high-touch digital service without adding unnecessary complexity and cost to order fulfillment and delivery.

The clienteling intersection



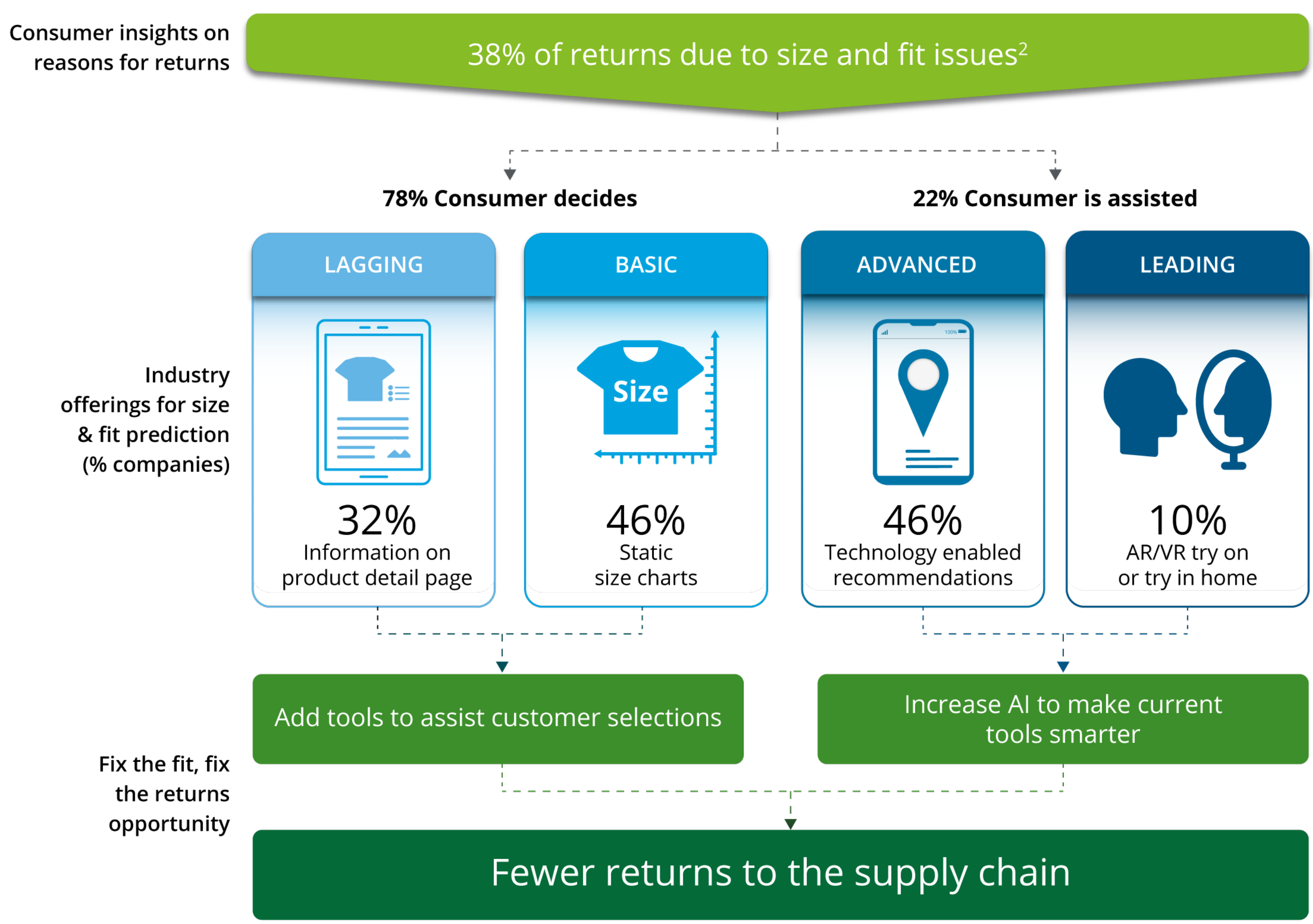
Fix the fit, fix the returns: Size-and-fit prediction in omnichannel

Consumers and companies both cite poor fit as the primary driver of online returns, and that view holds across categories—from clothing to home furnishings. Despite this, Deloitte's industry research over the last few years shows limited progress in the tools designed to address one of the industry's biggest concerns: persistently high return rates.

More than 80% of the companies we researched still rely on static, manual size charts that are difficult to decipher or simply list product dimensions on product detail pages, leaving customers to translate measurements into fit on their own.

Our recent survey of online consumer experiences also found that shoppers have low confidence in the technology-enabled fit tools they are currently offered[1].

That gap represents a major opportunity to pursue agentic solutions that proactively guide shoppers and improve accuracy by learning from purchase-and-return signals over time.



Enhancing the gift experience for two customers without added supply chain complexity

Gift services for online purchases are often expected—especially for luxury and jewelry—because the buyer wants the brand to be a visible, trusted part of the recipient's experience. These companies are typically better positioned to offer gifting options because higher price points can help cover the added supply chain work (for example, special packaging, inserts, and handling).

Brands selling other product types may also benefit from gift services by engaging two customers through a single order, either via digital solutions (such as digital gift messages) or by selling branded gift materials that reinforce the brand at the moment of unboxing.

Gift services can also help address higher return rates by increasing the likelihood that the recipient is happy with what they receive—for example, by offering selection services that give the recipient input into the item chosen for them.

Despite the multiple benefits gift services offer both consumers and retailers, fewer than 1 in 3 companies Deloitte has researched—across more than 300 companies—offer them.

Types of Gift Services	**Companies that offer BASIC capabilities HIGHER supply chain dependency**	**Companies that offer LEADING capabilities LOWER supply chain dependency**	**% customers that would use if offered[3]**
Messages	27% printed messages • Procuring & stocking materials • Technology & equipment to print • Fulfillment center or store execution	6% digital messages • No physical supply chain touchpoints • Carrier tracking information & status can be shared	80%
Selection	99% no selection services • Gifts are the second highest root cause of returns	1% digital selection • Top capability consumers said would reduce gift returns	79%
Packaging	17% wrapping services • Procuring & stocking materials • Fulfillment center or store execution • Increases packaging footprint (larger containers and protective fill)	2% DIY materials or purchase • Ships like product (simple pick/pack) • Incremental revenue stream • Expanded brand exposure with minimal effort	57%

Gift services are the post-purchase experience area where consumers report the highest unmet need today

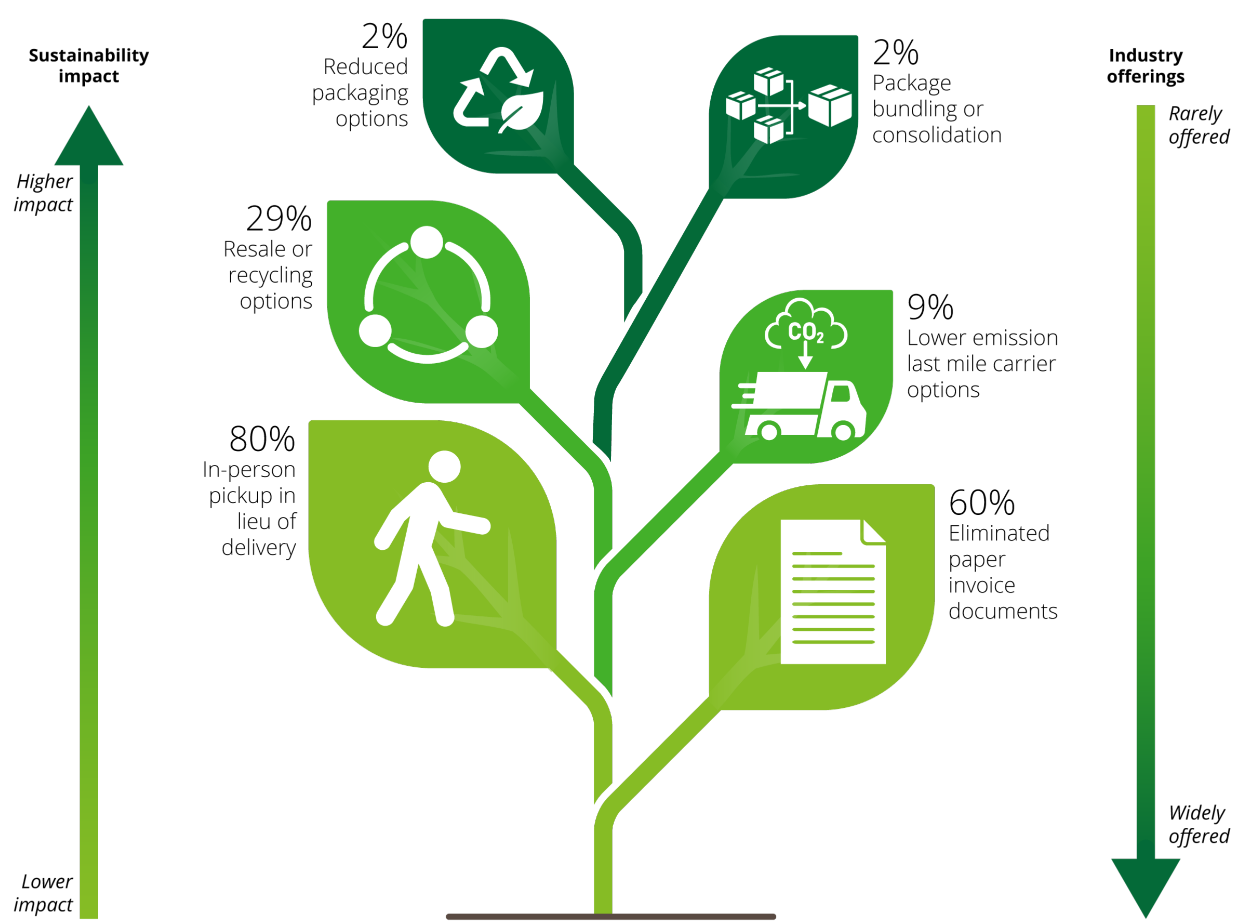
Elevating sustainability in the consumer post-purchase experience

Packaging and delivery are a major driver of the carbon footprint associated with online retail transactions, so building sustainability into the post-purchase experience matters to customers and retailers alike. Each step that improves packaging sustainability and reduces waste can also help companies avoid unnecessary cost.

Despite this, our industry research shows that only 4 of the 6 components that can materially reduce the environmental footprint of package delivery are widely offered today. This creates a risk that stated sustainability commitments do not match what customers experience in practice.

Reinforcing that gap, 45% of consumers surveyed by Deloitte said they do not feel the companies they shop with are doing enough to reduce the environmental impact of online order delivery[4].

Sustainable supply chain capabilities offered by companies today



Addressing sustainability means moving beyond low-hanging opportunities

86% of consumers will select sustainable options if available and 52% will choose a retailer that offers these versus one that does not[5]

Deloitte's omnichannel competitive landscape services

Deloitte's omnichannel competitive landscape research and assessment services can help companies quickly understand where they are leading or lagging key competitors across the end-to-end customer journey. We benchmark current capabilities, identify the gaps that matter most, and translate the findings into a practical set of priorities. We can also help you build the business case—linking improvements to customer experience and cost drivers—and support implementation of leading capabilities, from operating model and process changes to enabling technology and performance measurement.

Deloitte omnichannel competitive landscape research

We monitor and test the services retail companies offer across the post-purchase customer experience, including capabilities to transact and fill orders as well as services that retain ongoing loyalty

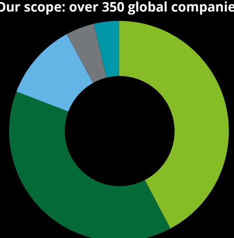
Research focus

Methods & outcomes

Research companies: Key statistics

We include companies of varying sizes, maturity, and operating models to capture the broadest spectrum of capabilities across the retail industry

Our scope: over 350 global companies



Wholesale/retail brands	42%
Specialty retailers	39%
Grocery and convenience stores	11%
Big box and department stores	4%
Discount/off-price & resale	4%

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Endnotes

1–5. Deloitte 2026 Consumer Post-Purchase Surveys

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