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Holiday 2025  
Omnichannel Post- Purchase  
Performance Study



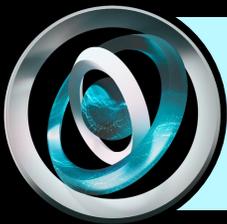
# Executive Summary

This study evaluates post-purchase service offerings and performance during peak holiday demand across three high-impact moments—**Cyber Week delivery execution, holiday shipping cutoff strategy, and peak-season returns**—to understand where customer experience and margin are won or lost after checkout. It aims to quantify industry performance benchmarks, surface emerging trends, and identify gaps and opportunities that can affect on-time delivery, customer satisfaction, and profitability during the most revenue-critical weeks of the year

It is critical for retail companies to understand peak-season post-purchase performance across the industry because the weeks around Cyber Week and the holidays compress a

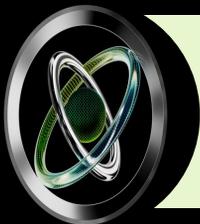
disproportionate share of annual revenue into a short window where execution issues escalate quickly into lost sales, higher service costs, and lasting brand damage.

Deloitte’s industry benchmarking helps retailers distinguish company-specific problems from broader market constraints (e.g., carrier capacity, transit volatility, returns surges), set realistic customer promises, and prioritize investments that protect margin—such as improving delivery promise accuracy, refining shipping cutoff strategies, and accelerating returns and refunds. By seeing how peers perform, retailers can calibrate service levels to remain competitive, reduce risk during demand spikes, and strengthen customer loyalty when expectations are highest.



**Cyber Week delivery performance:** Promise accuracy (what was shown at checkout) versus actual delivery outcomes

*The biggest experience failures often come from missed promises (too early or or late vs. promised date), not absolute transit time*



**Holiday cutoff effectiveness:** Whether published cutoffs drove the intended sales and whether they were aligned with fulfillment & carrier capabilities

*Overly aggressive cutoffs can create late deliveries and service costs; overly conservative cutoffs can suppress peak sales opportunities*



**Peak returns dynamics:** Return policies, time allowed to make gift returns, services that save sales and time-to-refund

*Peak returns expose gaps in policy clarity, routing/disposition, and refund speed—directly impacting repeat purchases and inventory health*

## Cyber Week Online Order Delivery

Our research found that, across the retail industry, companies indicated Cyber Week orders shipped via standard service would be delivered 7–8 days after the order is placed. However, our performance tests showed that most deliveries arrived in 5 days or less—23% faster than the delivery date shown at checkout. This suggests a broader industry challenge: retailers need better visibility into, and confidence in, their fulfillment networks and carrier partners' performance so they can provide more accurate delivery timeframes to customers during peak-volume periods.

During Cyber Week, delivery quote accuracy is critical because customer trust hinges on whether the order arrives when the brand said it would, not simply how fast it shows up in absolute terms.

Reliable performance against the promised delivery date can matter more than speed in driving customer satisfaction—especially when shoppers are coordinating gifts, travel, and other time-sensitive needs around the checkout estimate. In that context, under-promising and delivering significantly earlier does not always translate into a satisfied customer.

Cyber Week delivery accuracy can matter beyond a single order: if shoppers lose trust during this period, they may shift the rest of their holiday online purchases to competitors they perceive as more reliable.

### Deloitte Cyber Week 2025 Delivery Speed Performance Test Results

Calendar Days from Order to Delivery	1-2	3-4	5-6	7-8	9-10	11 or More
<b>57% Expected Here</b>						
% of Deliveries Based on Timeframes Shown at Checkout	10%	22%	15%	18%	19%	16%
<b>62% Delivered here</b>						
% Of Deliveries Based on Actual Time from Order to Delivery	18%	39%	13%	9%	15%	1%



## Holiday Delivery Cutoffs

Clear communication of holiday delivery cutoffs is critical for online gift purchases because shoppers plan around the date they see at checkout and in promotional messaging.

If a retailer cuts off too soon, it can unnecessarily discourage purchases, push shoppers to competitors, and leave margin on the table. If a retailer cuts off too late, they incur increased delivery expense along with a higher risk of late deliveries, customer service escalations, refunds or appeasements and lasting trust erosion at the most important time of year.

Getting the cutoff right—and communicating it consistently across the site, checkout, and customer emails—helps balance conversion, cost, and customer confidence.

Our industry research found that the median cutoff for standard delivery was 8 days before Christmas Eve 2025. We also found that 28% of companies did not publish a holiday cutoff calendar on their sites or at checkout, leaving customers to infer whether gifts would arrive on time based on day-to-day delivery messaging. Another key finding: most companies appear to treat all orders placed around the cutoff window as if they need to arrive by Christmas, despite the surge personal shopping driven by heavy promotional sales. **When every order is managed under the same “must arrive by Christmas” assumption, true gifts cannot be isolated and prioritized, and retailers may incur unnecessary carrier service upgrade costs.**

### Deloitte Holiday 2025 Industry Research Findings

11% of Our Performance Tests Arrived After Christmas Day

Christmas 2025 Standard Delivery Cutoff Dates	DECEMBER 7 - 13	DECEMBER 14 - 20	DECEMBER 21 - 24	NO CUTOFF INDICATED
% of Companies	5%	60%	7%	28%
Potential Risks	Loss of Peak Selling Season Sales	Lowest Risk with Less Need for Carrier Upgrades	Missed Customer Commitments Carrier Upgrade Expense	Customers Being Disappointed or Shopping with Competitors That Provide

Less than 10% of companies offered customers an option at checkout to indicate whether an order was needed by Christmas



## Peak Season Online Returns & Refunds

Despite the industry focus on accelerating online delivery speed, there is an opportunity to extend that focus to return processing and refund timelines—and to communicate performance more accurately. Some companies we researched that show order pick-and-pack within hours still set customer expectations for refunds that span weeks after a return is received. Our peak-season returns testing also found that the gap between communicated refund timeframes and actual return processing performance was 3x larger than the difference between Cyber Week delivery estimates and actual deliveries. In our tests, companies indicated customers could expect a refund within 2 weeks of receipt, while the actual median

time for returns to be processed was under 6 days—8 days faster than promised. It's critical for companies to offer the fastest refund processing possible, because many customers review return policies before deciding whether to buy. Long wait times for refunds also make “refund status” updates a top driver of customer service contacts, adding avoidable cost and further eroding margins on returns

Cumbersome processes and vague refund timeframes will not deter digitally native customers from preferring mail-in returns, but they can influence where—and whether—they choose to buy

### Deloitte Post- Holiday 2025 Mailed Return Performance Test Results

Timeframe from Return Receipt to Refund	Pre - Receipt When Shipped	Within a Week of Receipt	Within 2 Weeks of Receipt	Within 3 Weeks of Receipt	Over 3 Weeks After Receipt	No Timing Provided
<b>81% Expected Here</b>						
% of Returns Based on Timeframes Shown on Return Policies	13%	23%	25%	19%	10%	10%
<b>76% Refunded Here</b>						
% Of Returns Based on Actual Package Receipt to Refund Processed	16%	60%	14%	2%	8%	

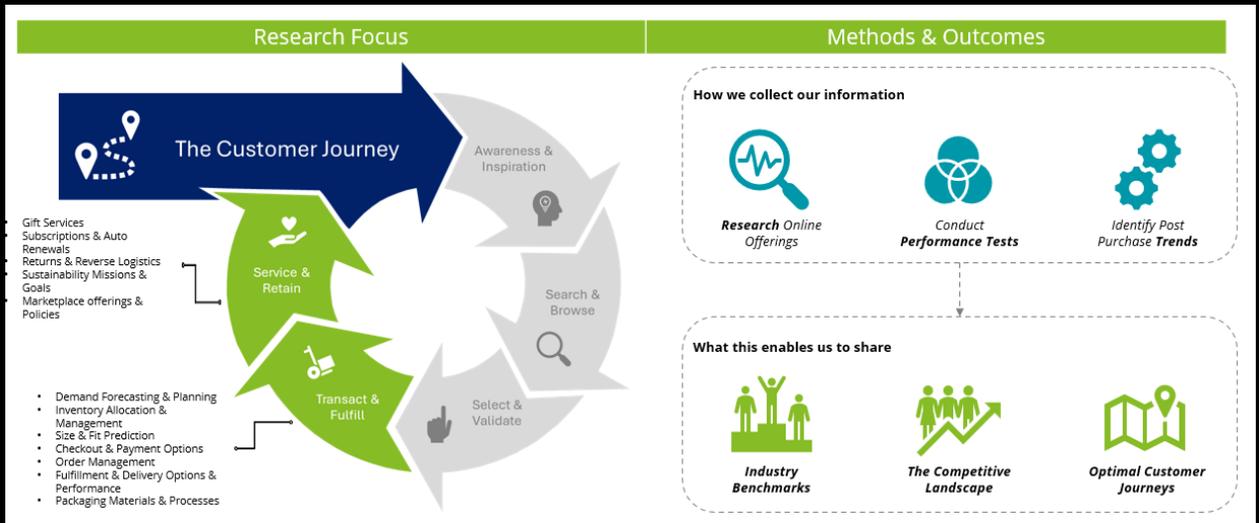


# Deloitte's Omnichannel Competitive Landscape Services

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.

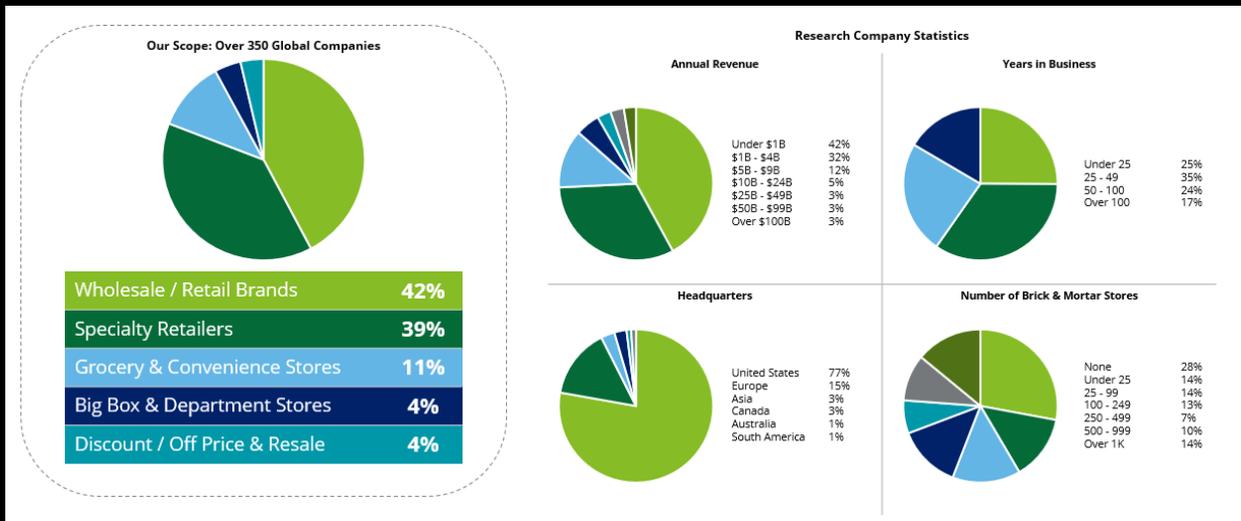
## Deloitte Omnichannel Competitive Landscape Research

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 Companies: Key Statistics

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



To learn more about our industry studies and services, visit [Deloitte.com](https://www.deloitte.com).

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