The Delivery Experience Gap

Based on the Delivery Experience Index 2026, a study of 5,000 Swedish shoppers conducted by Wahsel in partnership with Insitepart and Ingrid

THE UNCOMFORTABLE TRUTH

Your delivery is on time. Your customer *still isn't happy.*

Most retailers measure delivery the way logistics teams have always measured it: on-time rates, lead times, scan compliance. By those numbers, Swedish e-commerce is doing well.

And yet, when 5,000 shoppers were asked across five sectors, delivery accounted for between 29% and 42% of how satisfied they were with the retailer overall, depending on the category. Operational success and customer satisfaction have drifted apart, and revenue falls through that gap.

29–42%

Customer satisfaction with delivery experience from checkout to returns, by sector.

5–10%

Estimated sales uplift, a modelled potential from an improved delivery experience.

Delivery transforms from a logistics problem into a *commercial* one

Delivery is the only physical moment in an online purchase. It is the brand showing up at the door, the locker etc. It carries more weight than the website, the checkout, or the marketing that brought the shopper in. Treating it as a back-office function leaves the largest single lever on customer satisfaction untouched.

This paper sets out what 5,000 shoppers across pharmacy, beauty, clothing & footwear, sports & outdoor, and furniture & home told us they actually want — and where the biggest commercial opportunity sits for retailers willing to act on it. And where do you stand?

THE ANATOMY OF DELIVERY EXPERIENCE

Six touchpoints decide whether the shopper *comes back.*

Delivery experience isn't one event. It spans six touchpoints*, and shoppers rate retailers on all of them, whether the retailer is paying attention or not. Each touchpoint sits with a different team inside the retail organization. That fragmentation is one reason the experience falls between the cracks.

The touchpoint	What shoppers judge it on	Internal owner
Checkout	Clear delivery options, trustworthy payment, transparent pricing on shipping.	**E-commerce**
Communication	Order confirmation, proactive updates, fast alerts when something changes.	**E-commerce & Customer Experience**
Delivery & collection	Trust, punctuality, the package arriving as promised: home, locker, or pick-up point.	**Logistics**
Fullfilment execution	Right item, undamaged, well-packaged, on-time lead time, not wasteful.	**Warehouse**
Returns & claims	Free, clear, fast refund, easy instructions.	**Operations & Customer Experience**
Customer service	The problem gets solved by a real person, professionally.	**Customer service**

Retail sectors weight the touchpoints differently

Where delivery experience matters most, and which touchpoints carry the most weight, varies by category. Clothing and footwear lives or dies on the returns experience. Furniture and home is decided on customer service.

Pharmacy is most sensitive to the checkout and the delivery itself. Copying the leader in another sector misses the point. What matters is knowing which touchpoints your shoppers weight most, and investing there first.

The Delivery Experience Index is built from these six touchpoints. Each touchpoint is evaluated by shoppers and weighted by its relative importance within each sector. This means the index does not assume that all categories work the same way. A strong delivery experience in furniture & home is not built from the same priorities as pharmacy or clothing & footwear. *The Delivery Experience Index is built from these six touchpoints. Each touchpoint is evaluated by shoppers and weighted by its relative importance within each sector. This means the index does not assume that all categories work the same way. A strong delivery experience in furniture & home is not built from the same priorities as pharmacy or clothing & footwear.*

THE COMMERCIAL CASE

A 20% better delivery experience is worth *5-10% more sales.*

Across the five sectors studied, a meaningful improvement in delivery experience — moving from sector average towards top-quartile performance on the index — is estimated to drive 5–10%* in additional sales. Modelled against current Swedish e-commerce revenue in these categories, that points to 3–6 billion SEK in annual upside. The model excludes the long-tail value of higher loyalty and lower service costs.

Where retailers gain most. Delivery experience is still often managed through a cost and working-capital lens. Yet the data shows that a large share of the commercial potential sits in touchpoints that traditional org charts treat as cost centres: fulfillment, delivery, returns and customer service. Cost discipline still matters, but operational decisions need to be evaluated against both cost and customer impact.

Why this upside is *usually missed.*

Logistics investment is hard to justify because the revenue impact is hard to isolate. CFOs see the cost line; they don't see the cart that was abandoned because the delivery promise was vague, or the second order that never came because the return was painful. Retailers who run their delivery strategy as a commercial discipline, as opposed to a pure cost-management exercise, are the ones capturing the upside. That means treating delivery options the way merchandisers treat assortment: tested, priced, positioned, and measured against revenue.

Shoppers will pay for the right delivery, but only if you ask
17% of shoppers will pay extra for the fastest option. 28% will pay extra for a slower, more convenient one. 32% pick the cheapest and accept the trade-off. The single biggest commercial mistake is treating these three groups as one and pricing delivery as if they all want the same thing.

Method note. The 5-10% sales uplift is a modelled market-level estimate. It is based on a 20% improvement in delivery experience, applied to current Swedish e-commerce revenue in the five studied sectors: pharmacy, beauty, clothing and footwear, sports and outdoor, and furniture and home. Category revenue estimates are based on SCB, Handelsfakta and E-barometern 2025.

THE MEASUREMENT BLIND SPOT

The levers to *quantify delivery* are in plain sight

Most delivery decisions inside a retail organization are made without a P&L. The shipping fee gets approved by finance. The pre-selected option in the checkout was set by whoever built it three years ago. The promise window is pulled from a carrier API. Each of these choices touches the touchpoints that drive 29–42% of shopper satisfaction with the brand, but the retailer has no model that connects the two.

Platform data from across the Swedish retail landscape makes the patterns visible. Four of them recur across categories, and each hides a revenue opportunity.

68%

Share of orders completed using the retailer's pre-selected delivery option.

60%

Share of orders completed using the delivery option listed first at checkout.

54%

Share of orders with free shipping, the norm rarely tested against willingness to pay.

Defaults decide two in three orders.
What retailers pre-select at checkout is what shoppers accept, which means default configuration is a merchandising lever. Retailers who treat it that way can price and test their defaults instead of leaving them fixed.

Free shipping is the norm, but it isn't priced against willingness to pay.
Shoppers fall into three willingness-to-pay groups, all facing the same price list. 28% of shoppers would pay more for a slower, more convenient option, 17% for the fastest, and 32% pick the cheapest. Many retailers charge by delivery type, and few test whether the prices match what shoppers actually want.

Roughly one in six orders is late, and the shopper hears about it last.
16% of deliveries arrive after the promise window, and 42% of shoppers rank fast information on delays as critical. Proactive updates that reach shoppers before they ask turn a broken promise into a manageable situation instead of churn.

Precision over speed.
When delivery precision matters more than speed, longer lead times can enable a more balanced and efficient fulfillment operation. By reducing peaks and improving planning accuracy, retailers can lower fulfillment costs and potentially pass those savings onto customers through lower delivery charges or more competitive pricing.

Based on aggregated behavior, data from Swedish e-commerce checkouts and delivery flows.
Figures describe observed order behaviour, not stated shopper preference.

WHERE TO ACT FIRST

Despite high scores, *four weak spots* show up everywhere.

Average Delivery Experience Index scores across sectors sit between 83% and 87%. That is high enough to look healthy on a dashboard, but low enough to leave meaningful commercial opportunities on the table. The recurring weak spots are the gaps between what shoppers value and what they currently experience.

Vague delivery times

"2–5 working days" is nothing more than a buffer. Shoppers consistently rank a clear, visible delivery time among the top three checkout factors. Most retailers still display the carrier's range without giving shoppers a clear answer.

Owners: E-commerce and Logistics.

Silence on exceptions

Standard order confirmations and tracking links are fine. The gap is proactivity: when something is late, only the leading retailers tell the shopper before the shopper notices. Although 42% of shoppers say fast information on delays is critical, many retailers default to reactive customer service.

Owners: CX and Customer service.

Friction in returns

Free returns and easy instructions are now non-negotiables, as over half of clothing and footwear shoppers rate "return is free" as extremely important. Retailers who add steps, charge for the label, or hide the policy are paying for it in repeat purchase.

Owners: Operations and Customer service.

The unboxing

77% of shoppers rank receiving the right item as extremely important, 58% rank the product arriving clean and fresh, and 38% want it well-packaged. This is fulfillment's job, but the cost of getting it wrong shows up in net promoter score (NPS) and customer experience metrics, not in the warehouse management system (WMS).

Owner: Warehouse and Fulfillment.

Fulfillment: from a cost line to *enabler*

Ensuring the correct item, in good condition, arriving when promised remains one of the most important factors across every customer segment in the study. Increased automation in pick-and-pack operations has created stronger conditions for delivering consistently on what shoppers value most and for tightening the delivery promise without raising operating cost.

A sequenced way in

Start where the customer promise is made: checkout. Clarify delivery options, delivery timing and pricing before the order is placed. Then fix the moments where the promise breaks: proactive communication on delays, clear ownership of delivery exceptions, and faster customer service response. Third, treat returns as a retention loop rather than a cost event. Finally, audit fulfilment and packaging against what shoppers actually value: correct item, clean and fresh product condition, and packaging that protects the order without creating unnecessary waste.

WHERE TO ACT FIRST

Delivery is being redesigned, but *who leads it?*

For most of the past decade, delivery has been treated as a downstream consequence of e-commerce strategy. The data in this study suggests that era is closing. When 29–42% of customer satisfaction sits in touchpoints that traditional org charts treat as cost centres, the case for owning delivery as a strategic discipline becomes hard to argue against.

This requires a shared operating model. Customer insight must define what matters. Operational design must make the promise deliverable. Delivery orchestration must make the promise visible, selectable and measurable in the buying journey. When these three perspectives are separated, delivery becomes a cost discussion. When they work together, delivery becomes a commercial discipline.

Three perspectives on what comes next

Customer insight.
Shoppers are telling retailers which touchpoints matter most, where expectations are being met, and where the experience breaks. The signal needs to be read sector by sector, retailer by retailer.

Operational design.
The biggest gains rarely come from running existing operations harder. They come from redesigning the touchpoints so that operational performance becomes visible as customer value: clearer promises, fewer exceptions, faster resolution and better fulfilment consistency.

Commercial orchestration.
Delivery options, pricing, defaults and communication are now strategic levers. They should be tested, priced, positioned and measured with the same rigour as assortment, campaigns and checkout conversion.

Continue the conversation.
The Delivery Experience Index is designed to help retailers quantify where delivery experience creates commercial value, where the organisation is leaking satisfaction, and which touchpoints should be improved first. For sector-specific findings or a discussion of how the index applies to your business.

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About this paper

The Delivery Experience Index 2026 combines a nationally representative survey of 5,000 Swedish online shoppers with anonymized, aggregated platform data from across the Swedish retail landscape, pairing what shoppers value with how delivery performs at scale. It was analyzed by Wahsel and conducted by Wahsel in partnership with Insitepart and Ingrid.

The study covers five sectors: pharmacy, beauty, clothing and footwear, sports and outdoor, and furniture and home, with 1,000 respondents each. The beauty sample includes female shoppers only.

Sample and recruitment
Respondents were recruited via online panels and quota-sampled to reflect the Swedish population, with no weighting applied. Qualifying respondents had purchased in the relevant sector within the past 12 months; retailer-level evaluations were included only where they had bought from that retailer within the past three months.

What the Index measures
The Index evaluates six delivery touchpoints across the journey from purchase to resolution: checkout, communication, delivery and collection, goods and packaging, returns and claims, and customer service. Treating delivery as a sequence of distinct moments rather than a single score shows where each sector wins shopper confidence and where it's lost.

How sectors are scored
Sector results use survey-derived importance weights, so each touchpoint contributes in proportion to how much it shapes satisfaction in that category. The result is a measure calibrated to each sector's own priorities.

The sales-uplift estimate
The 5–10% sales uplift is a modelled, market-level opportunity, not a guaranteed outcome. It applies a 20% improvement in delivery experience to current Swedish e-commerce revenue across the five sectors, using category data from SCB, Handelsfakta and E-barometern. It is deliberately conservative, excluding further value from lower service costs, reduced claims handling, and stronger long-term loyalty.