Locus

2026 US Holiday Delivery Confidence Index

Your Customer's Delivery Confidence Gap is Already Costing You Peak 2026. You Don't Know it Yet.

54% of U.S. shoppers abandoned carts over delivery date uncertainty. Insights from Locus' Q4 2026 Holiday Delivery Confidence Index and 3,000 shoppers surveyed since January.



The season has started. The National Retail Federation expects **$1.013 trillion** in U.S. holiday retail sales across November and December. The question is how much of it reaches your checkout, and how much of it leaves because a shopper did not believe your delivery date.

54%

U.S. shoppers abandoned an online cart in the past 12 months because they were not sure the order would arrive when they needed it.

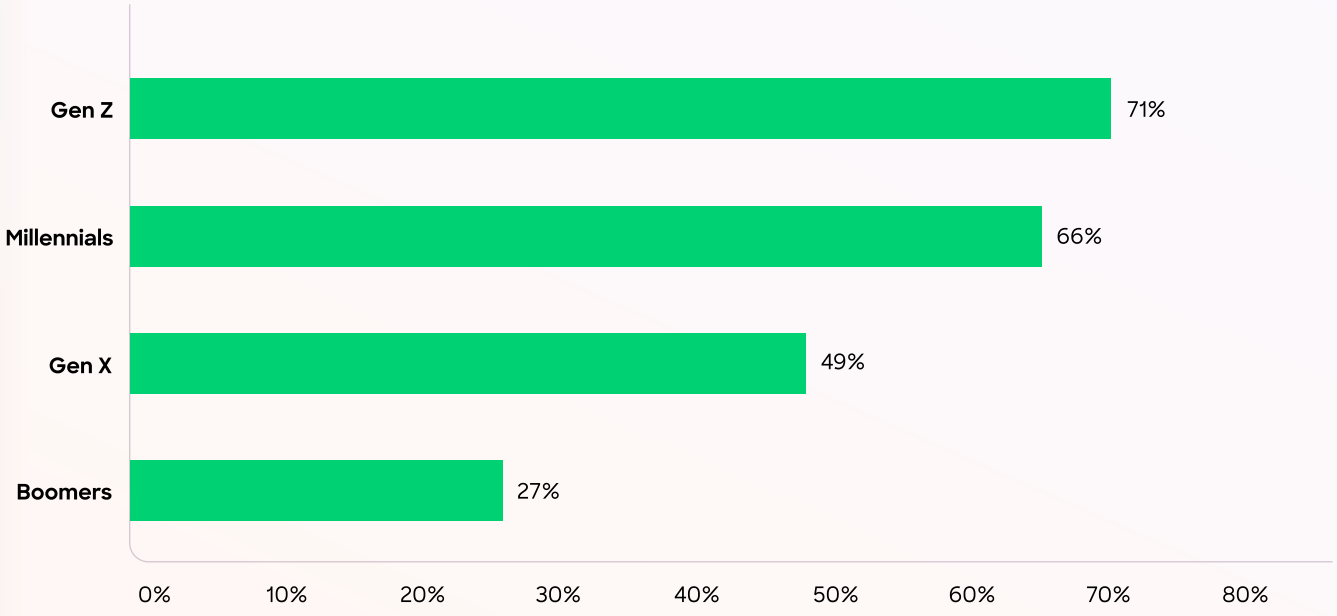
Rises to 71% among Gen Z

1. Cart abandonment over delivery doubt, by generation

The Revenue Leak That Never Reaches Your Funnel

Delivery failure is usually measured after the fact, in late deliveries and WISMO tickets. The larger number never enters your system at all. More than half of shoppers have already walked, and among the generations who will do most of your growth, it is closer to seven in ten.

Seven in ten Gen Z shoppers have already left. You never saw the session.



28% have done it more than once. This is a habit, not an accident.

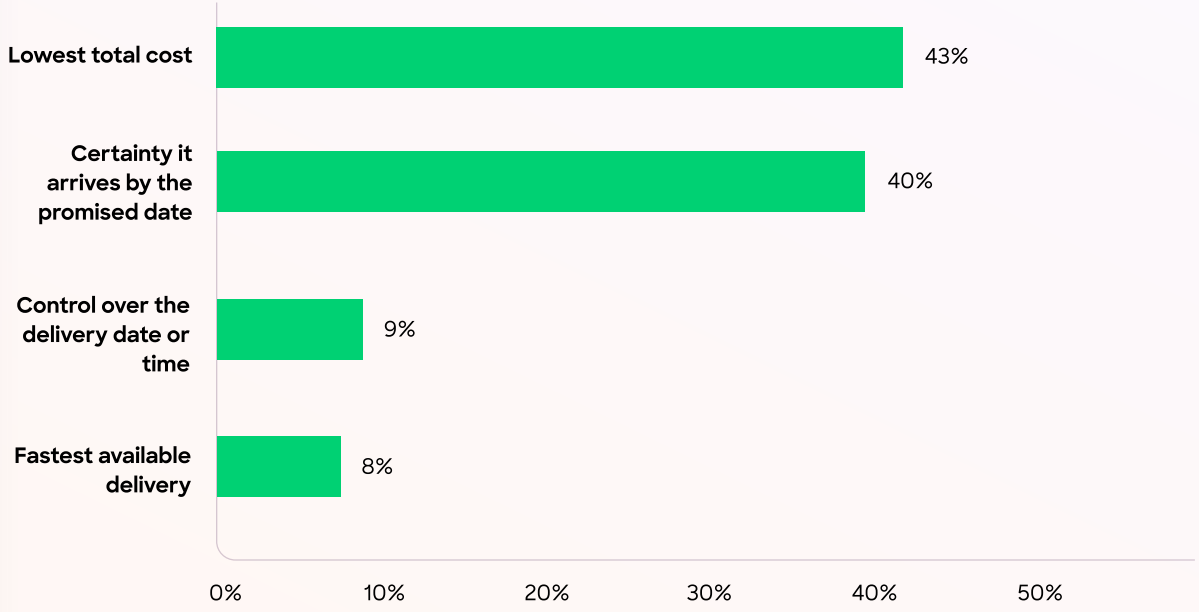
Fig. 1 Abandoned a cart over delivery doubt, past 12 months

2. Speed is not the race

You Are Competing on Speed in a Market That Stopped Buying it

When shoppers choose where to buy a holiday gift online, certainty beats speed by five to one. Fast has become the floor, not the differentiator: 69% already consider three days or less appropriate for any online order.

Certainty 40%. Fastest delivery 8%. A five-to-one gap your roadmap probably inverts.



Gen Z and Millennials put certainty first. Boomers and Gen X put cost first. Nobody puts speed first.

Fig. 2 What matters most when choosing where to buy a holiday gift

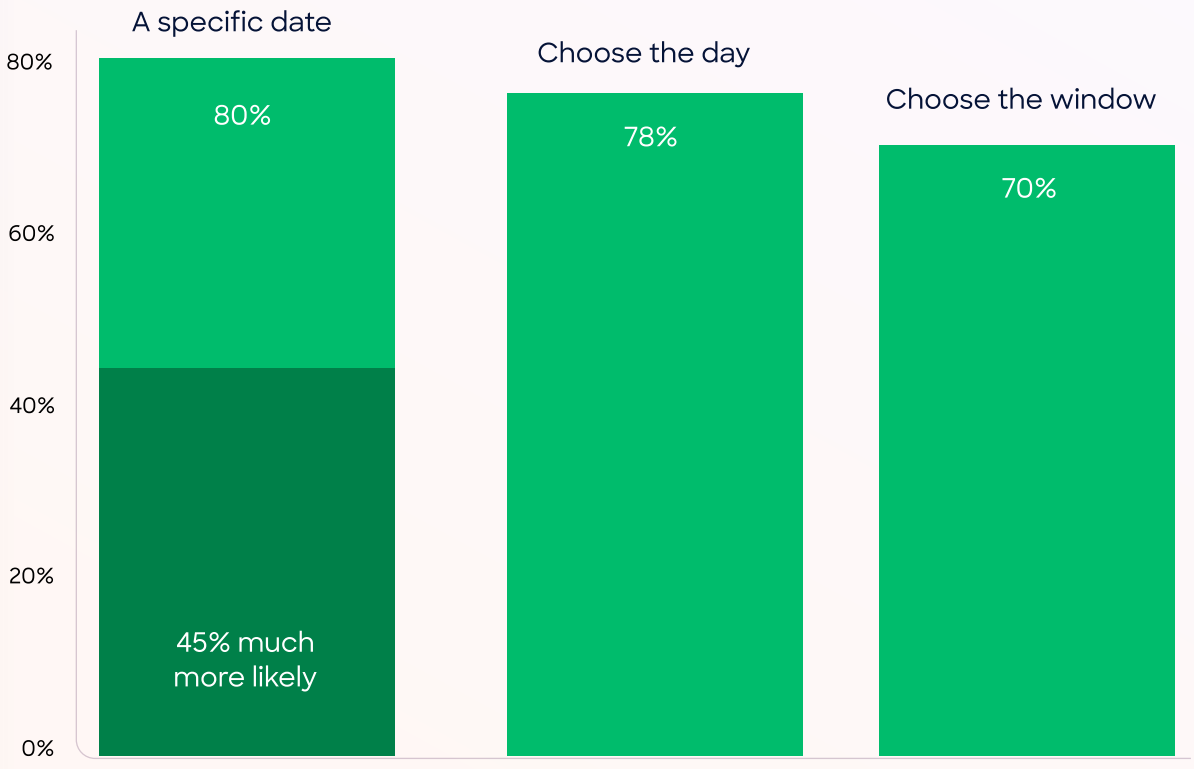
Locus 2026 US Holiday Delivery Confidence Index. In the Locus Q2 US Consumer Survey, 56% already ranked reliability or returns above speed.

3. Likelihood to complete the purchase

EDD Accuracy is the Cheapest Conversion Lift on Your Roadmap

The estimated delivery date, or EDD, is not a service detail buried in a shipping tab. It is a conversion lever, and shoppers say so plainly. Every hour your EDD stays a range instead of a date, the shoppers in Fig. 1 are deciding without it.

80% convert on a date. 45% convert hard. A range is what you show when you do not know.



The date does more work than the choice. Both beat shaving another day off transit.

Fig. 3 Would make me more likely to complete the purchase

Locus 2026 US Holiday Delivery Confidence Index.

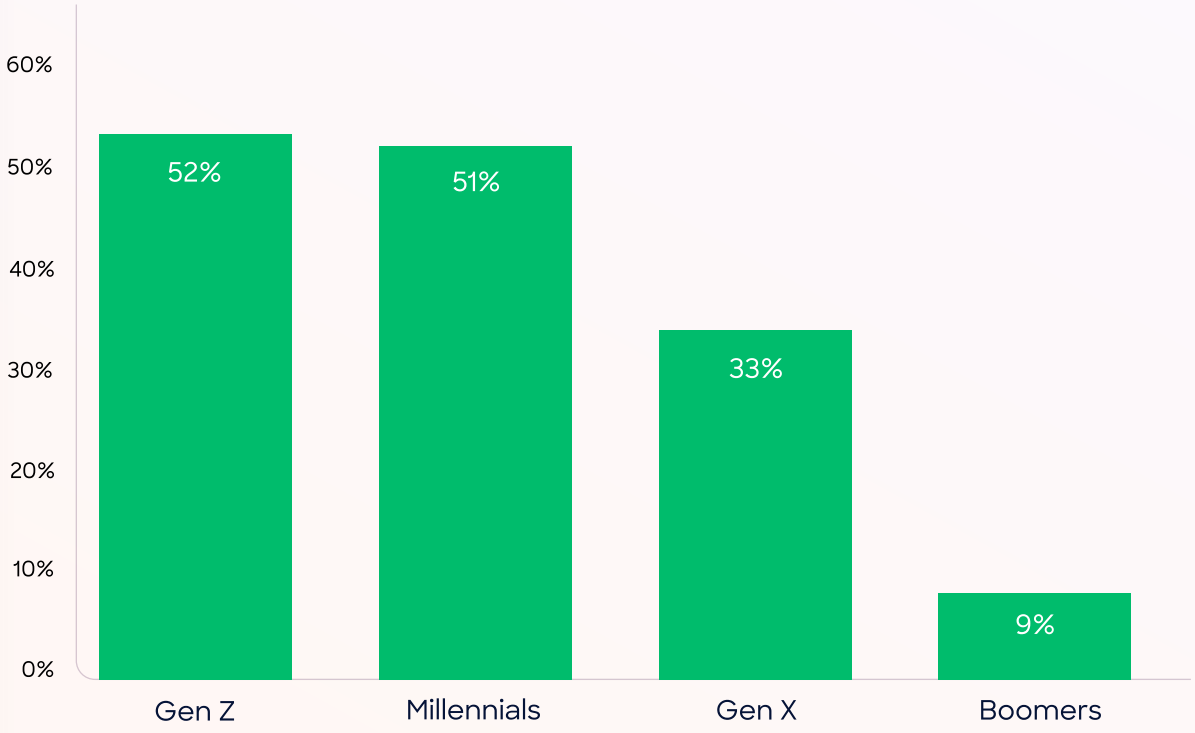
Locus

4. Propensity to pay for a guaranteed date

Delivery Certainty Has an Attach Rate. You Are Not Charging for it.

This is the finding most retailers do not expect. A guaranteed date is not only a cost to absorb. Shoppers have been buying it, and a further 23% considered paying and did not, because nobody offered them the option.

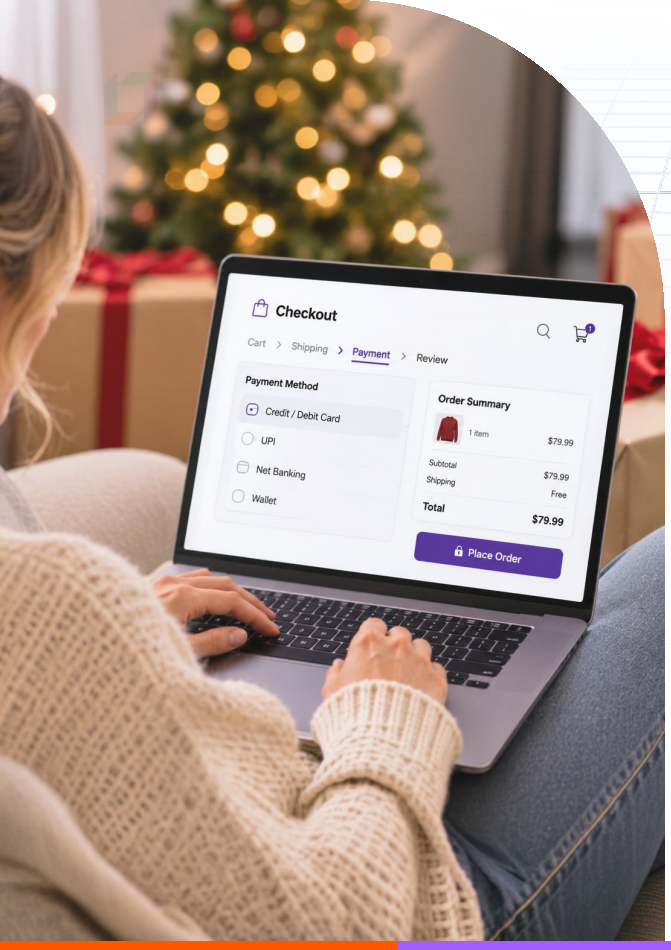
Half of Gen Z already paid for certainty. Another 23% tried to and found no option.



A further 23% of all shoppers considered paying extra and did not.
That is demand you are leaving on the table, not cost you are avoiding.

Fig. 4 Paid extra for delivery by a specific date, last holiday season

Locus 2026 US Holiday Delivery Confidence Index.

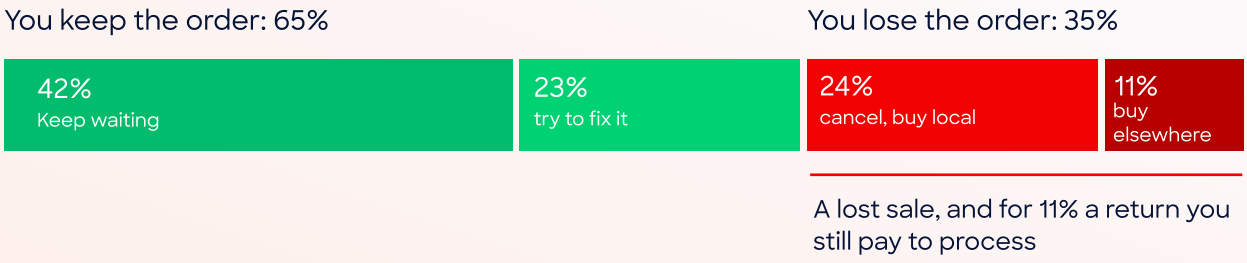


5. After checkout

Post-Checkout Doubt Costs the Order Twice and Funds Your Competitor

Winning the checkout is not the end of the risk. If a shopper starts to doubt an order will land in time, a third of them buy a replacement, and some of those keep both until yours shows up.

35% buy it somewhere else. 11% keep both and return yours.



And 35% expect to move the order to pickup themselves, without contacting your support team.34% expect to reschedule the date. 33% expect to change the time window. Among Gen Z, 44% expect to switch to pickup.

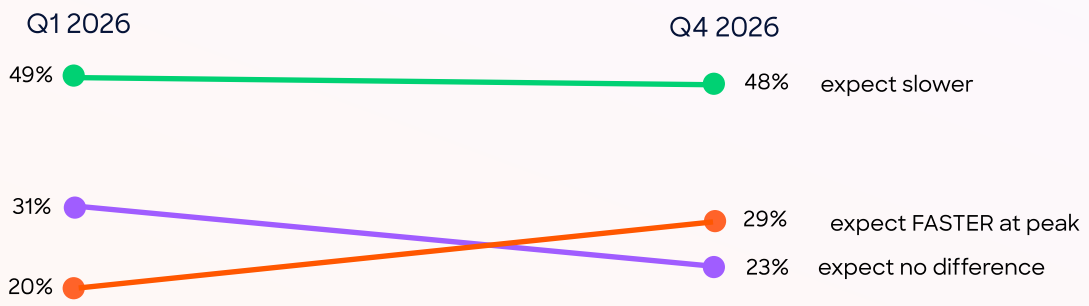
Fig. 5 What shoppers do when they fear an order will miss the date

6. Shift in peak-season speed expectations, Q1 to Q4 2026

Peak's Grace Period is Closing Faster Than Your Network is Improving

Peak used to come with a grace period. It is thinning. Across our three surveys this year, the share of shoppers expecting holiday shipping to be faster than the rest of the year rose nine points, while the share expecting it to be slower barely moved.

Fewer shoppers each quarter are willing to call peak a fair excuse.



The shoppers who expected peak to be slower did not change their minds. The rest got less forgiving.

Fig. 6 Expected holiday shipping speed, Q1 2026 against Q4 2026

Same benchmark question in the Locus Q1 2026 US Consumer Survey and the Locus 2026 US Holiday Delivery Confidence Index, 1,000+ U.S. shoppers each.

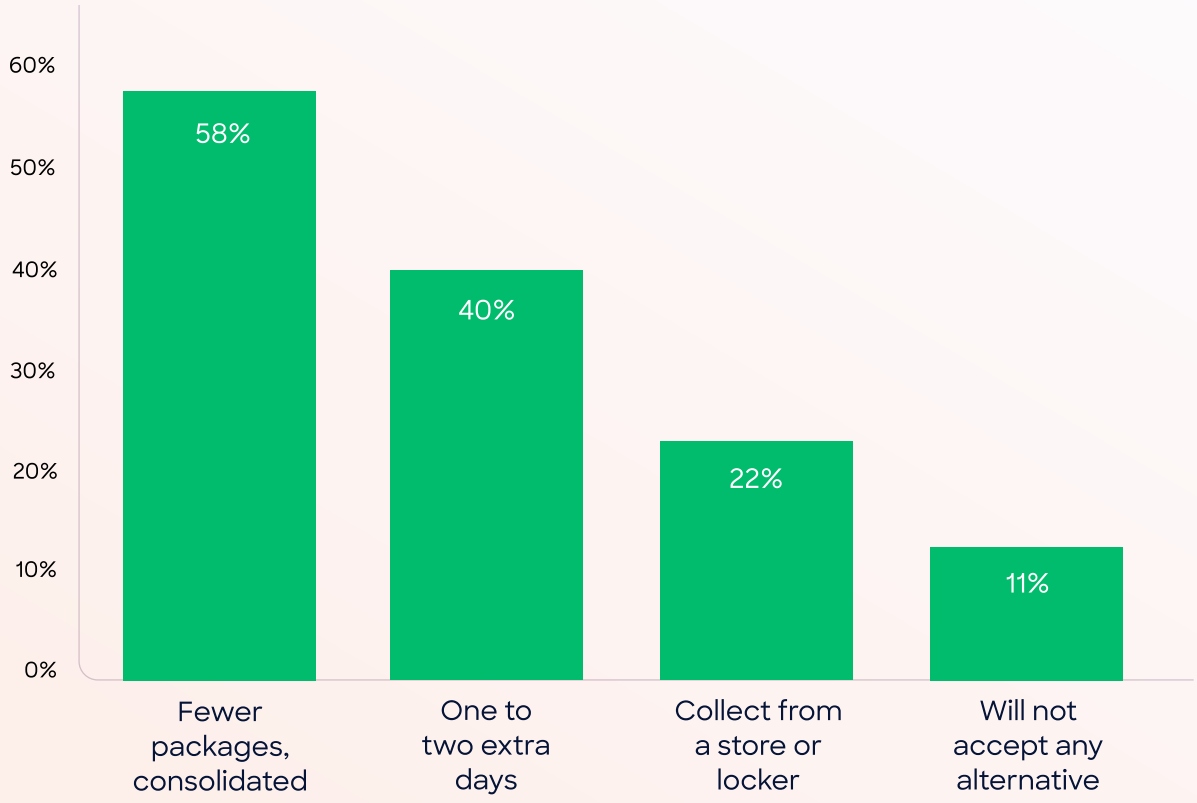
Locus

7. What the earlier surveys add

Your Shoppers Will Flex. Your Checkout Never Asks Them.

The two earlier surveys this year found something most peak planning ignores. Shoppers are not rigid about how a parcel reaches them. Only 11% reject every alternative on offer. What they will not accept is being told nothing and given no choice, which is exactly what the Q4 index shows them punishing.

Only 11% reject every alternative. The other 89% are waiting to be asked.



Q4 confirms it: 35% now expect to move an order to pickup themselves, without asking you.

The constraint is not shopper willingness. It is whether the option appears before they decide.

Fig. 7 Delivery tradeoffs shoppers will accept when asked

Locus Q2 US Consumer Survey. Pickup expectation from the Locus 2026 US Holiday Delivery Confidence Index.

The Cyber Five Fix List

Put beside the Q1 finding that just 9% believe brands always meet their delivery promises, the pattern across all three surveys is consistent. Shoppers have low confidence in the promise and high willingness to help you keep it. Peak rewards whoever closes that gap first.

1

Put a date on the page, not a range

80% say a specific promised date makes them more likely to buy. A range is what you show when the network cannot tell you the answer.

2

Price the guarantee instead of absorbing it

37% already paid extra for a date. Another 23% would have. Offer the paid option beside the cheap one and let shoppers choose.

3

Price the guarantee instead of absorbing it

35% expect to move an order to pickup themselves, 34% to reschedule. Self-service here is cheaper than the replacement purchase it prevents

How a large apparel retailer used Locus to put a delivery date shoppers could trust at checkout, and cut WISMO and returns queries by 40%

Read the case study →

SOURCES NOTE

This is the inaugural Locus Holiday Delivery Confidence Index. These figures become the baseline. We will run the Index again next peak, which means the gap between what shoppers expect and what retailers deliver becomes measurable year over year, for the first time in U.S. retail.

Based on the Locus 2026 US Holiday Delivery Confidence Index, a survey of 1,000 U.S. consumers, alongside the Locus Q1 2026 US Consumer Survey and the Locus Q2 US Consumer Survey, each of 1,000+ U.S. online shoppers. Holiday retail sales forecast of $1.013 trillion for November and December per the National Retail Federation ↗.
"National Retail Federation" carries an outbound link on the web page. Keep it linked in the PDF.