Ensuring out-of-home delivery options benefit everyone

July 2026

citizens advice

Executive summary

As parcel volumes have exploded in recent years, it has become apparent that **home delivery does not always meet consumers' needs**. People are receiving more parcels than ever, but often need to be out during working hours, leading to missed deliveries, insecure drop-offs, or the inconvenience of waiting in.

In response, **parcel companies have developed new out-of-home (OOH) delivery options** for consumers to send and receive their parcels.

This report finds OOH alternatives have become a significant part of people's experience of the parcel market - **with three quarters of respondents having used an OOH option in the last year**. People value the option as it offers **greater flexibility and security, at a lower price point,** compared to home delivery.

However, while OOH offers clear advantages, **there's a risk that not all consumers can access those benefits**. We want this alternative to be as widely accessible as possible, and this means addressing barriers facing rural and disabled users, in particular.

Key recommendations:

Monitoring
OOH options represent a significant share of today's UK parcel deliveries. Ofcom must now incorporate OOH delivery into both its annual market monitoring and its user experience tracker. They should seek to understand both network coverage and consumer proximity to **pick up and drop off points (PUDOs)**.

Accessibility
Parcel companies should work with disabled consumers to identify and rectify ongoing accessibility issues with PUDOs. Information on accessibility features must be readily available. Locker height is the main issue, so companies should have lower locker preferences available wherever possible.

Ofcom should begin assessing operators' OOH options against Consumer Protection Condition 5, requiring fair and appropriate treatment of disabled customers.

Home delivery is not always working well

In 2024-25, UK consumers sent and received a record-breaking **4.2 billion parcels** - equivalent to 11.5 million parcels deliveries every day.[1] The rapid growth of online shopping during the pandemic, together with the continued popularity of online marketplaces, has driven sustained high demand for parcel delivery.

However, our parcels monitoring has consistently shown home delivery does not always work well for people. In our 2025 Parcels League Table,[2] **37% of people reported experiencing a problem with their most recent parcel home delivery.** Missed deliveries, concerns about parcels being left unattended, and the need to wait at home for a delivery remain common frustrations.

Parcel operators must continue to improve the quality of doorstep delivery, including meeting accessibility requirements, allowing people sufficient time to answer the door, and making appropriate use of safe-place options.

But, even when services operate as intended, home delivery may not always be the best option for everyone.

Many people are simply not at home during standard delivery hours. Work, school, caring responsibilities, and other commitments make it difficult to receive parcels at the doorstep. And the risks of packages being left in doorways or inappropriate places can make home delivery less appealing.

Based on a survey of over 4,500 consumers who've used parcel services in the last three months, **our new research sheds light on consumer use patterns, drivers, preferences, and barriers to OOH delivery**:

23% could never work from home

17% found it difficult to arrange for someone to be at home to receive parcels

33% felt uncomfortable with parcels being left without physical collection

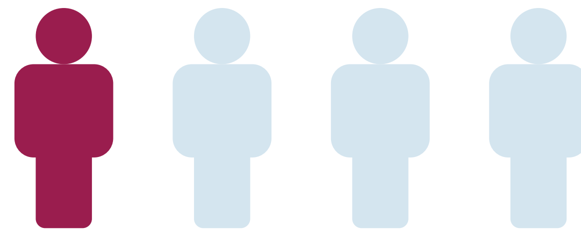
People are now choosing OOH options at scale

People are already choosing OOH delivery in significant numbers. In our survey, three quarters of respondents (76%) had used an OOH option in the last year and **a quarter of respondents (25%) used it for their most recent parcel delivery**.

Compared to Ofcom's 2024-5 estimates, which put market share at 12%, our findings suggest uptake is growing.[3] This is supported by the ongoing expansion of the PUDO network across the UK, with network density growing by 27% in 2025 compared to the previous year.[4] As network coverage expands further, adoption of OOH delivery may continue to grow.

OOH is clearly already a significant element of the parcel market. To fully assess consumer experience, we must therefore look at OOH delivery alongside traditional home delivery.

In its most recent *Post Monitoring Report*, Ofcom began reporting on the market share of OOH.[3] This is a positive first step. As OOH becomes an increasingly important part of the parcel market, **Ofcom should also start monitoring the user experience of OOH options.**



1 in 4 respondents used a PUDO to receive their latest parcel delivery

Recommendation to Ofcom: OOH delivery now represents a significant share of UK parcel deliveries. Ofcom must incorporate OOH delivery into both its annual market monitoring and its user experience tracker.

Convenience is key to choice of delivery option

Home delivery remains the preferred option for most respondents (66%), with convenience being the main driver.

That said, a significant proportion of respondents said their preference depends on the circumstances (21%), while a smaller group said they now actively prefer OOH delivery (13%).

66% prefer home delivery

21% say it depends

13% prefer out-of-home

The most common factors influencing people's decisions on whether to choose home or OOH delivery were:

- Personal schedule (37%)
- Cost (37%)
- How far away the PUDO is (35%)
- Size and weight of their parcel (34%)

Taken together, this suggests OOH is a complement to home delivery, rather than a replacement for it.

When we asked respondents who prefer OOH delivery what their reasons were, **the primary reasons were connected to it fitting around their lives.** The most common drivers were:

- 66% flexibility
- 57% reduced risk of missed deliveries
- 54% convenient location
- 50% security

Women particularly valued OOH's flexibility - with 71% citing flexibility as a reason (compared to 57% of men).

OOH is often offered as a lower cost option. We calculated that cost of OOH is an average has a 26% discount compared to home delivery among the five largest parcel companies. **Although almost half (47%) of people who preferred OOH listed cost as a reason, it was less influential than the practical benefits**.

People’s preferences are reflected by the range of PUDO options available

The UK currently has a mix of PUDO types in its network, with **64,847 staffed services and 26,891 self-service lockers** available.[5] This mix seems to reflect people’s preferences for different types of PUDO.

Self-service lockers are the most popular single option, preferred by 37% of PUDO users. But **most respondents preferred some kind of staffed service** (including 24% Post Offices, 21% convenience stores, 15% in-store collection).

37% prefer self-service lockers

60% prefer a staffed service

Preferences vary by demographic group in some cases:

- Younger people and women are more likely to prefer self-service lockers
- Older and disabled people are more likely to prefer staffed locations.

As lockers are a newer choice of PUDO, it’s possible that preferences may shift over time, as density and familiarity increases.

Top three reasons for preferring lockers:

1. 60% lockers being open all hours of the day
2. 51% finding it quicker to use them
3. 42% finding it easier to use them

Top three reasons for preferring staffed services:

1. 43% location point is near my home
2. 40% preference for a staffed service
3. 37% finding it easier to use them

OOH delivery should be accessible for all

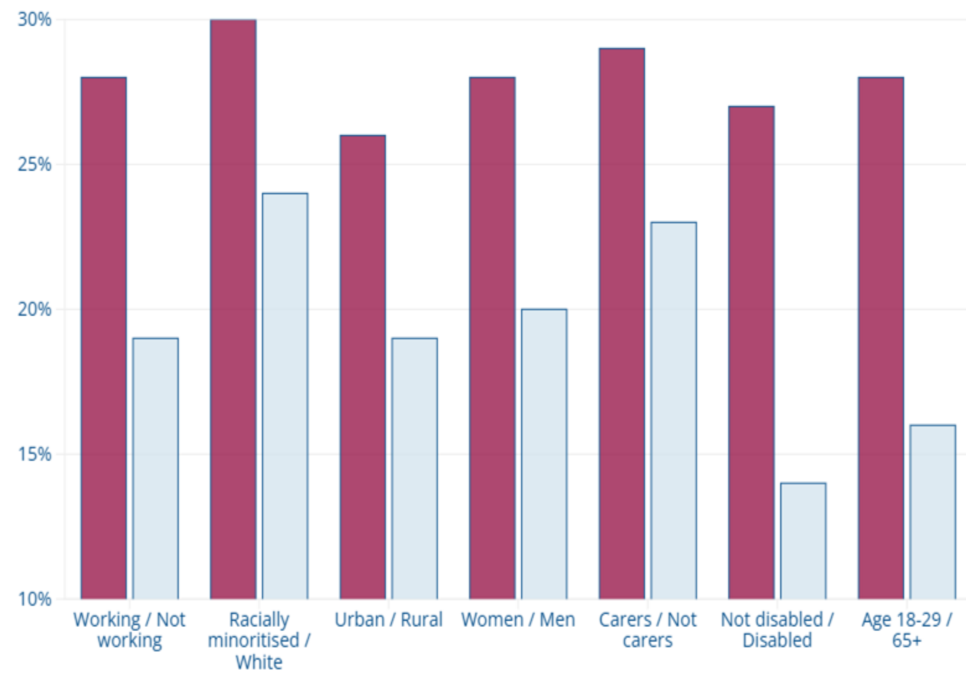
As convenience and price encourage increasing numbers of consumers to opt for OOH delivery, it is important that everyone has the opportunity to access this option.

At present, OOH delivery is not offered consistently. A third (33%) of respondents reported being offered a PUDO option only occasionally or rarely. Expanding consumer choice, so OOH is offered at checkout as much as possible, remains important.

However, current adoption patterns are also uneven. Younger age groups, people who are employed, carers, urban residents, women, and people from ethnic minority backgrounds are more likely to use OOH. By contrast, disabled people, rural residents, and older age groups are less likely to use OOH.

There were some differences in how often these groups were offered OOH delivery, but these were not large enough to fully explain the gaps in usage rates. We expect some variation to reflect genuine differences in consumer preferences, driven by variations in lifestyle factors. However, it is important to ensure we minimise any barriers that can prevent people from accessing OOH options.

Proportion of respondents who used a PUDO for their last delivery, by demographic group



The following pages explore two areas where our research suggests there might be barriers at play - accessibility challenges faced by disabled consumers, and travel distances to PUDOs in rural areas.

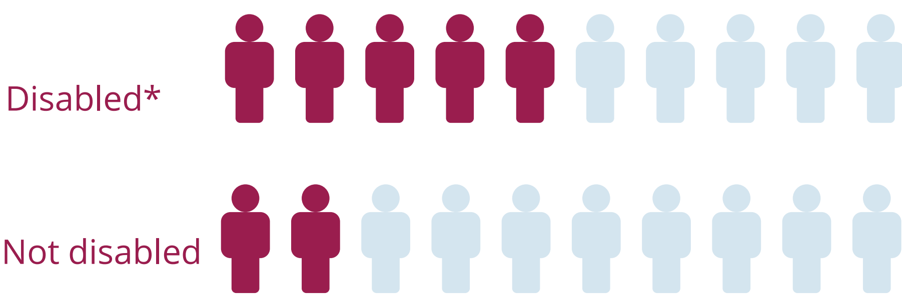
Parcel lockers present particular accessibility challenges

Our research asked people who had used PUDOs whether they experienced any accessibility issues.

Overall, 26% of users reported having experienced some kind of physical barrier when using a locker, compared to 21% with staffed PUDOs.

When it came to locker use, disabled people* were twice as likely to have experienced an accessibility issue than those who weren't disabled.

51% of respondents who had a long-term health problem or disability which significantly impacted their day-to-day activities experienced a physical barrier, compared to 21% of non-disabled people.



Physical barriers experienced by disabled people when using a parcel locker:

- 28% locker size or compartments being out of reach
- 22% difficult travel to the location
- 17% lack of staff help

The most common issue disabled people faced was finding the locker size or height was out of reach. Women - despite being more frequent users of parcel lockers - were twice as likely as men to report locker heights or sizes being out of reach (15% compared to 7% of men).

When reviewing information provided on company websites, two companies provide the option to request a lower locker.[7] We encourage parcel companies to review the accessibility of locker heights and see if they could offer this option.

* Disabled here means those who have a long-term health problem or disability that has lasted or is expected to last year or more and their disability or health problem significantly impacts their day-to-day activities

Accessibility of OOH options needs better oversight

The ability to shop online has opened up retail to many disabled people, reducing physical barriers and offering greater independence. Ofcom acknowledged the need to ensure that the parcels market was changing to reflect the needs of disabled consumers when it introduced its new conditions for parcel carriers in 2023, requiring that parcel "collection, delivery and receipt" were accessible.[6]

But this guidance is not always being reflected in a changing parcels market. **We reviewed the accessibility information provided by five major parcel operators and found that only two published information about the accessibility features of their PUDO networks**.

Accessibility barriers should be identified and addressed so that OOH delivery is a viable option for everyone. This is particularly important given that OOH delivery tends to be cheaper. We must avoid a situation where disabled customers are paying a price penalty because they can't access PUDOs.

Recommendation to parcel companies: Work with disabled consumers to identify and rectify PUDO accessibility issues. Locker height is the key issue we came across, so companies should ensure lockers are reachable or the option to request lower lockers is available. Information on accessibility options for both home and out-of home delivery should be easily available to consumers.

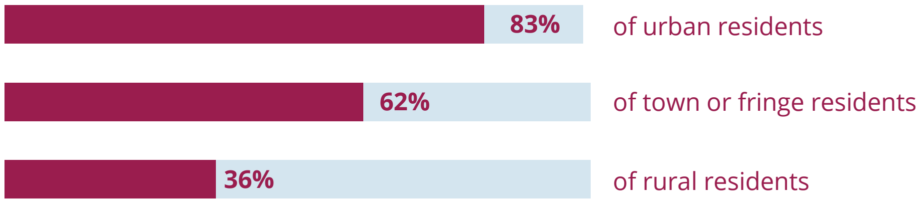
Recommendation to Ofcom: Ofcom should begin assessing operators' out-of-home delivery offer against Consumer Protection Condition 5, such as requesting information from carriers on how their PUDO offer fits with the fair and appropriate treatment of disabled consumers.

Rural areas risk missing out on benefits of OOH

Estimates suggest that the UK has 29.5 PUDO points per 10,000 population, ranking 8th among 31 European countries on this metric.[7] However, national averages mask important differences in proximity across the UK.

Our survey found that, unsurprisingly, the closer consumers lived or worked to a PUDO, the more likely they were to use OOH delivery for their most recent parcel.

Proportion of people within 20 minutes walk of a PUDO by location



Rural consumers therefore appear to be at greater risk of missing out on the benefits of OOH delivery - as urban respondents were more than twice as likely to live or work within a 20-minute walk of a PUDO than rural respondents (83% versus 38%).

We also found regional differences in coverage, with lower levels of walking proximity* in Northern Ireland, Wales and the South West, compared with the UK average of 76%.

Wales PUDO walking proximity is 68% - 8% below average

South West PUDO walking proximity is 65% - 11% below average

Northern Ireland PUDO walking proximity is 61% - 15% below average

While proximity is a factor that influences people's use patterns and choices, we found that not everyone walks to PUDO.

Overall, 58% of people most commonly walked, whereas 38% drove. In rural areas, only 23% of people walked and 73% drove.

*Walking proximity definition: living or working less than 20 minutes walk to the nearest PUDO

A clearer picture of coverage, proximity and user experience is needed

As an under-monitored area of the market, there are gaps in our understanding of network coverage, proximity, and user experience of PUDO points.

Measuring consumers' true access to PUDOs is not straightforward. Networks are not interoperable, and consumers generally cannot choose which parcel carrier is used at checkout. As a result, they may be offered a PUDO that is not their nearest location.

PUDO networks grow organically, based on parcel operators' decisions on where to install infrastructure. Inevitably, more densely populated areas will end up with more PUDOs, as they are more profitable to serve.

While parcel operators publish location data, there is no single dataset that allows the network to be monitored as a whole. As OOH becomes an increasingly important option, understanding where infrastructure is located - and who can access it - will be increasingly important.

While increasing overall PUDO network density in rural areas will be important for increasing access, usage, and maximising environmental benefits, a more targeted, 'carrier-neutral' solution may make more sense for very remote or sparsely populated areas.

Where PUDO 'not-spots' exist, the Post Office could act as a universal entry point, with designated rural branches serving as a carrier-neutral PUDO.

Thanks to network requirements that ensure 99% of the UK population must be within 3 miles of their nearest branch,[8] the Post Office's infrastructure could be well-placed to deliver this.

Post Office acts as a PUDO for several parcel companies already, though availability varies by branch. It could build on this to deliver something akin to its banking hubs, which offer branch-neutral services in underserved areas.

Recommendation to Ofcom: Ofcom should seek to assess network coverage and the population's proximity to pick up and drop off points (PUDOs) in their postal monitoring work.

Methodology notes

Citizens Advice commissioned YouGov to survey 4,513 UK based adults, to find out about consumers' attitudes, experiences and preferences around PUDOs within the parcel delivery sector.

The sample included screening questions to ensure it included only recent parcel sender/receivers. Only people who had sent or received one or more parcels in the last three months were included in the survey. It included people who do and do not use OOH options.

Fieldwork took place between 10-23 March 2026, and responses were weighted to to be representative of people who had sent or received one or more parcels in the last three months so it was not nationally representative. A weighting scheme was applied to the final dataset to adjust for any sampling bias. It included a boost of 160 respondents with a disability and 280 respondents living rurally.

We reviewed the websites of five major parcels companies information regarding locker accessibility. We found that two companies offered the option to choose a locker at a lower height. Some providers offered limited or no information on locker accessibility on their websites.

We also compared the price of OOH delivery to home delivery for these companies, finding that OOH delivery was an average of 26% cheaper. The reviewed products varied by company depending on their specific offerings. Where prices varied by size, we selected the smallest parcel options and excluded any fast-delivery upgrades. The analysis was based on consumer-to-consumer (C2C) postage rates, except where couriers do not offer C2C service. Please note that these price differences were accurate at the time of writing but are subject to change, and C2C price differentials may vary from those offered at retail checkouts.

References

1. Ofcom, Annual monitoring Report on the Postal Market, 2025 - UK parcel volumes increased from 2.8 billion in the 2019-20 financial year to 4.2 billion in 2024-25, representing a total growth of 1.4 billion items. This 50% rise signifies a record volume
2. Citizens Advice, Parcels League Table, 2025
3. Ofcom's annual report puts market share at 12% in for 2024-5, but our survey showed in March 2026 that 25% of consumers used OOH for their latest delivery. Ofcom notes that some providers were unable to provide this data, so were excluded from this analysis. Differences suggest growth in market share, but seasonality or the excluded providers may also have an impact on this. Ofcom, Annual monitoring Report on the Postal Market, 2025, pg 7.
4. This is a comparison of network density in Lastmile Experts Out-of-Home Delivery in Europe reports for 2026 and 2025. The network density was grew from 23.3 in 2024 to 29.5 unique points per 10,000 population in the 2026, representing a 27% increase. Lastmile Experts, Out-Of-Home Delivery in Europe 2026, 2026, p139
5. Lastmile Experts, Out-Of-Home Delivery in Europe 2026, 2026, p139
6. Ofcom, Consumer Protection Condition 5, Disabled Consumers, July 2022, Annex 1-3
7. Lastmile Experts, Out-Of-Home Delivery in Europe 2026, 2026, p150.
8. Post Office is legally required to meet criteria such as maintaining a nationwide network of at least 11,500 branches, and ensuring that 99% of the overall UK population is within 3 miles of their nearest post office outlet. Postal Services Act 2011, Section 11 and Government Response: Future of the Post Office.

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