The Out of Home phenomenon

Perception study on consumption habits, preferences and perspectives

November 2025

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WHAT IS OUT OF HOME?

A delivery and collection model that uses alternative locations to the recipient's home, such as lockers, courier offices, fuel stations, or partner retail shops.

This model provides greater time flexibility, reduces failed delivery attempts, and simplifies both parcel pickup and returns, becoming an efficient and increasingly widespread alternative to traditional home delivery.

What are GLS Points?

A point of convenience is a physical location for parcel pickup, returns, and/or shipping services, usually located within a local business (such as a stationery store, convenience store, tobacconist, etc.), which collaborates with one or more courier companies.

A Locker or smart locker is an automated self-service unit that enables contactless parcel pickup and drop-off using access codes or mobile apps usually located in public places (stations, supermarkets, shopping centres).

01 Expanding Use

64% of Spaniards have already used an Out Of Home collection point

1 in 3
Combine pick-ups at a point of convenience or Lockers, particularly those receiving parcels weekly.

02 Convenience rules

Proximity, extended opening hours, and fast service are the most valued attributes.

70% state that shipping discounts are the main incentive.

03 Clear preferences

62.5% prefer, if both options are at the same distance, the point of convenience, especially because of the personal treatment and the
perceived security of a staffed physical location.

Lockers stand out during late hours due to their 24/7 pickup availability.

04 Impact on local commerce

86% of Spaniards believe that **collecting parcels at local businesses has a positive effect on the local economy.**

More than half
have ever purchased at the collection point itself.

05 Looking to the future

4 out of 10
Spaniards believe that **collection points will increase while home deliveries will decline.**

A more digital, **autonomous and personalized model is anticipated**: apps, real-time tracking and scheduled deliveries.

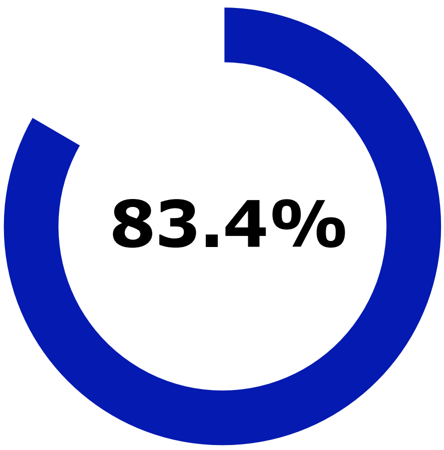
01

Consumption habits and motivations

Does society remember seeing any parcel collection points visible in any of the following locations?

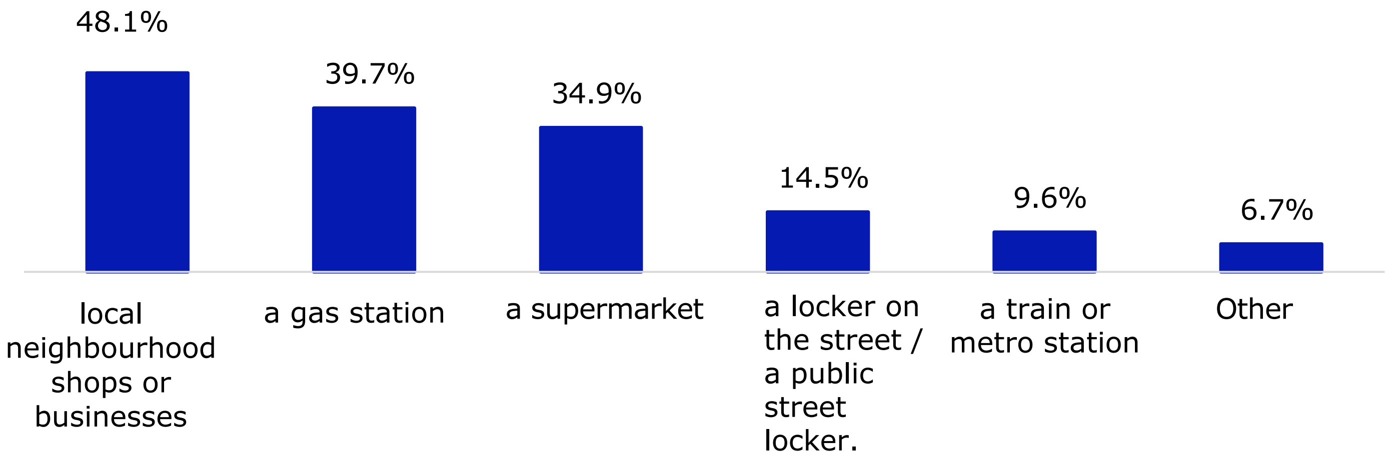
83.4% of the population remembers having seen a parcel collection point in the last three months, which confirms its wide visibility in public space. Each person who identifies them mentions, on average, 1.84 different places.

Percentage who remember seeing a parcel pick-up point in the last three months



Each person who identifies them mentions, on average, **1.84 different places**

Percentage who have seen a pick-up point at each location



The most recognized points are local **neighbourhood shops or businesses** (48.1%), followed by **gas stations** (39.7%) and **supermarkets** (34.9%), all of them everyday environments that favour visual contact with the service.

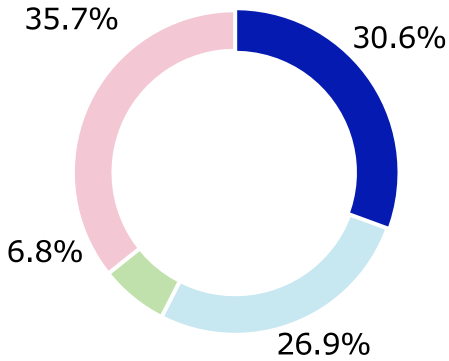
On the other hand, **lockers installed in public outdoor areas**(14.5%) **and train or metro stations** (9.6%) have an even more limited degree of visibility.

Parcel pickup: frequency and habits

64.3% of those surveyed have used a convenience point or locker at some point, and notably, almost one-third (30.6%) **have used both formats**.
The percentage of **users of convenience points** (57.5%) is clearly higher than that of those who have **used lockers** (37.4%).

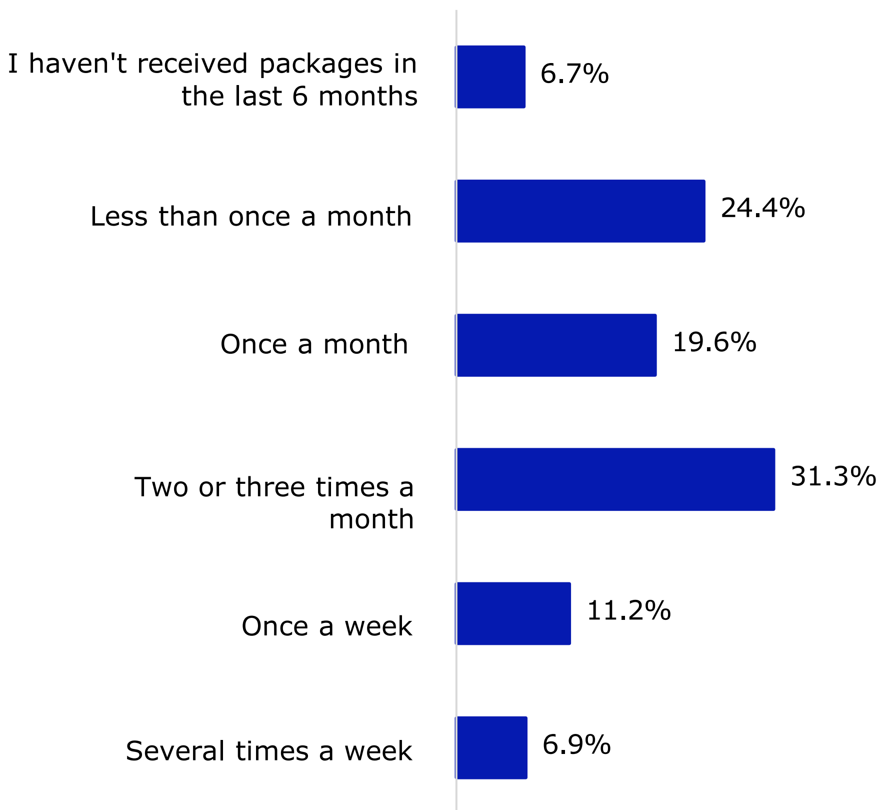
Percentage of users of convenience points and lockers

- Yes, I have used both
- Yes, I have used convenience points
- Yes, I have used lockers
- No, I've never used any of the two



Half of the population receives parcels at least two to three times per month

Frequency of parcel receipt

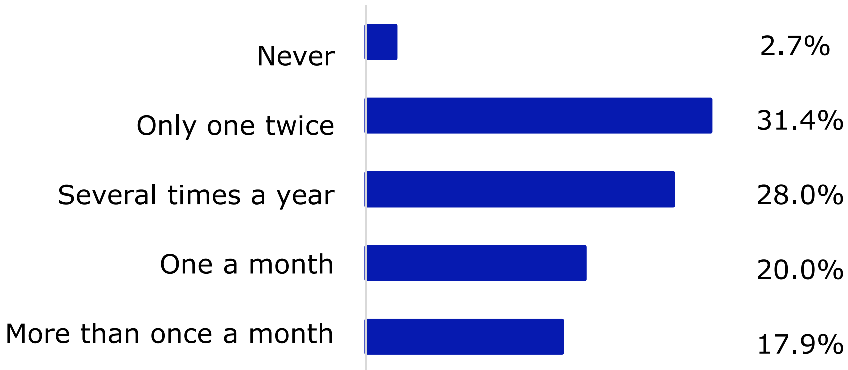


Direct relationship between reception frequency and the use of collection points: **among the most frequent users** (weekly reception), almost half **(47.9%)** have used convenience points and lockers

Parcel pickup: frequency and habits

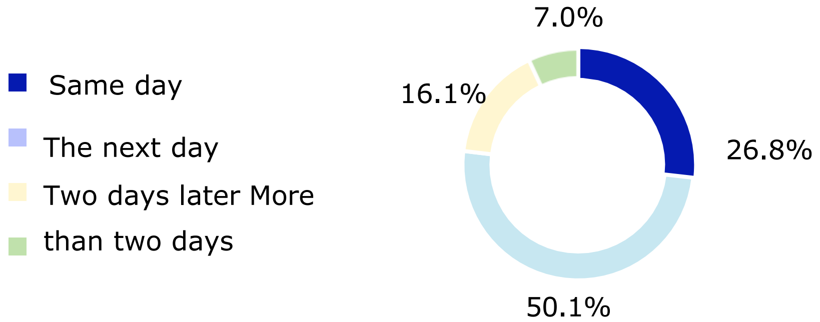
The use of convenience points and lockers in the last year is quite widespread: **only 2.7% have never used them**. However, **occasional use predominates**, with 31.4% having **used them only once or twice** and 28.0% **several times a year**. Only 17.9% **report more intensive use** (more than once a month).

Frequency of use of convenience points or lockers in the last year



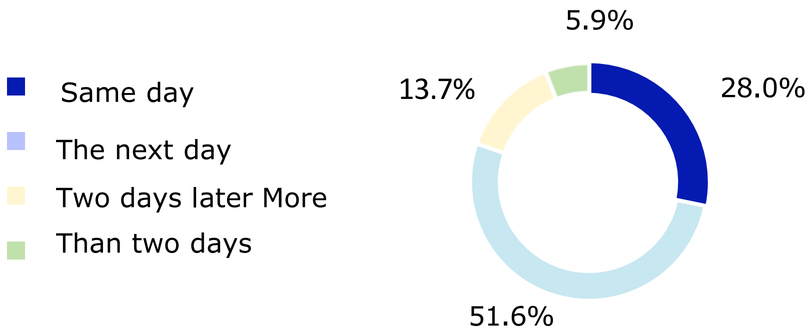
1 in 3 Spaniards use lockers or convenience points **one or more times a month**

Time elapsed between notification and pickup at points of convenience



The average pickup time is similar: 1.13 at convenience points and **1.05 at lockers**

Time elapsed between notification and pickup in lockers



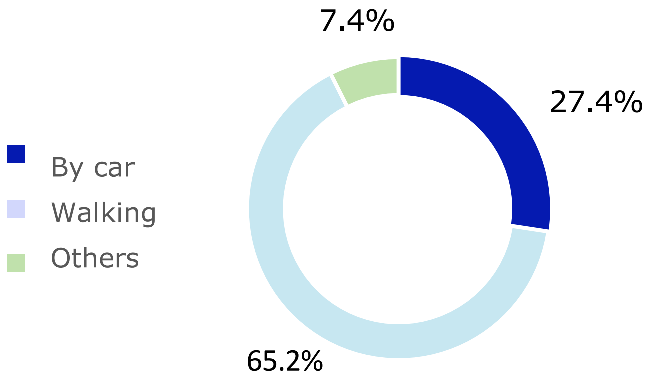
In both cases, more than half pick up their parcels the following day (50.1% at convenience points and 51.6% at lockers). **The percentage of same-day collection is also slightly higher for lockers (28.0% compared to 26.8%).**

Parcel pickup: frequency and habits

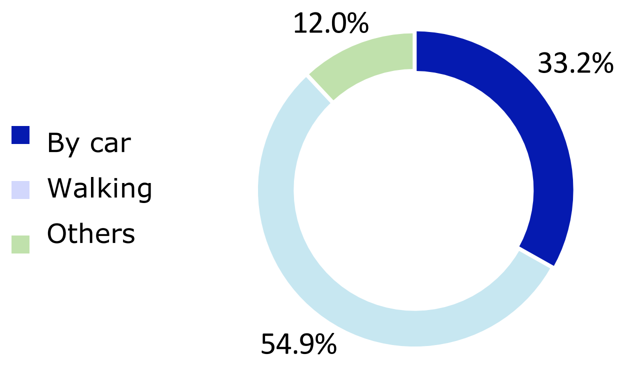
Walking is the most common method for collecting a parcel: 65.2% at convenience points and 54.9% at lockers

Car use is clearly increasing among the most **frequent users**. At convenience points, **33%** of frequent users go by car, compared to **21.6%** of non-users. In lockers, this difference is even more marked: **39.6% compared to 23.0%.**

Ways the package is picked up from the notice at points of convenience



Ways to pick up the package from the notice in lockers



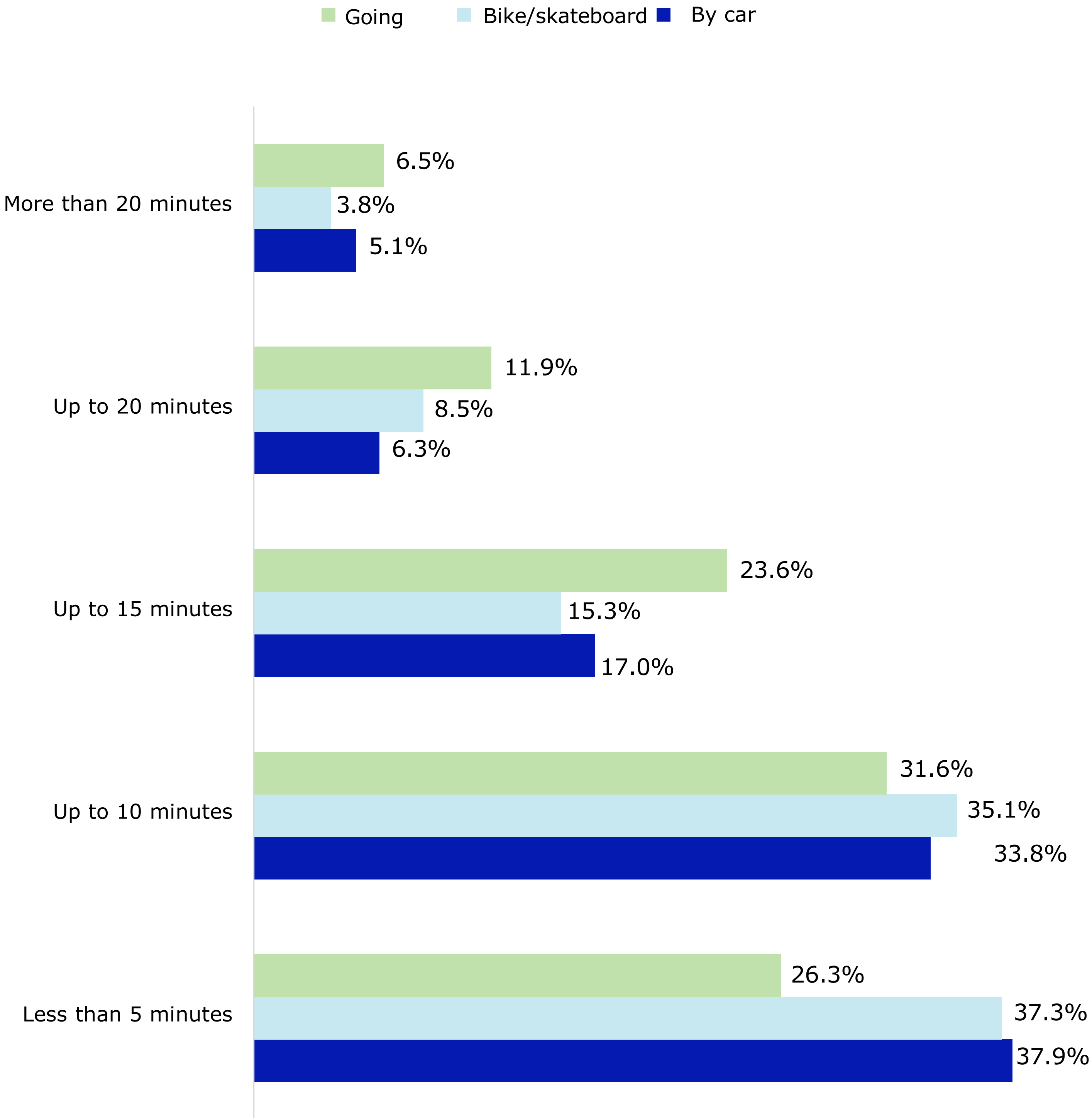
Percentage who would not go to pick up a package at convenience points or lockers in each transfer model

Car	Bicycle	Walking
21.8%	**50.4%**	**7.2%**

Parcel pickup: frequency and habits

Walking is also the most chosen model for **longer journeys in parcel collection: 23.6% accept journeys of up to 15 minutes** and more than 18% even beyond that threshold.

Maximum time willing to invest to pick up a package at convenience points or lockers, over the total of those that would go in each transfer model



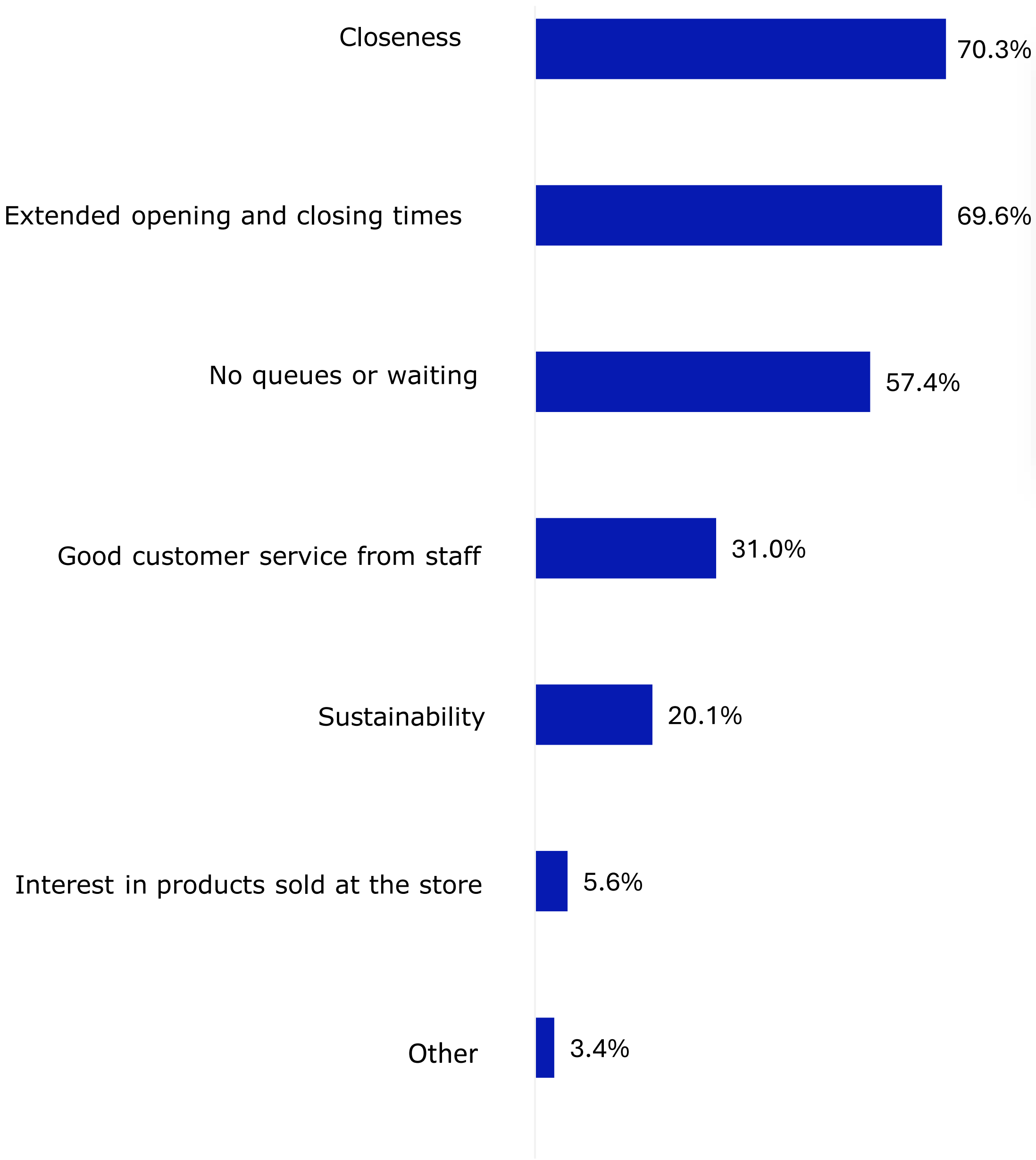
User experience in parcel pickup

7 out of 10 Spaniards value the proximity and breadth of opening hours as the most important aspects in the pick-up experience

Other relevant aspects include extended operating hours (69.6%) and the absence of queues or waiting times (57.4%).

Frequent and regular users highlight more the schedules and the agile operation of the service, which reflects a more functional and practical experience.

Most important aspects in the user experience



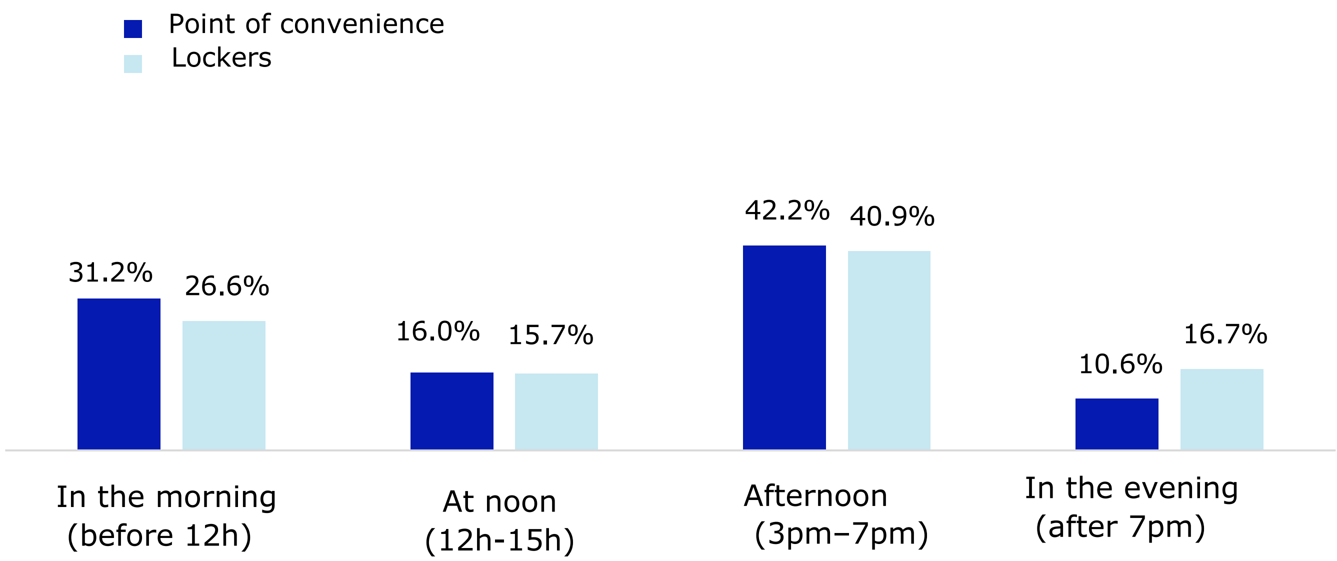
The more use is made of the service, the more focused the valuation is on **efficiency and convenience**

User experience in parcel pickup

The afternoon (3pm–7pm) is the preferred time slot for picking up packages both at convenience points (42.2%) and at lockers (40.9%), indicating a clear coincidence in the general preference of users for this time of day.

More than 4 out of 10 prefer the afternoon (3pm-7pm) to pick up a package in both formats

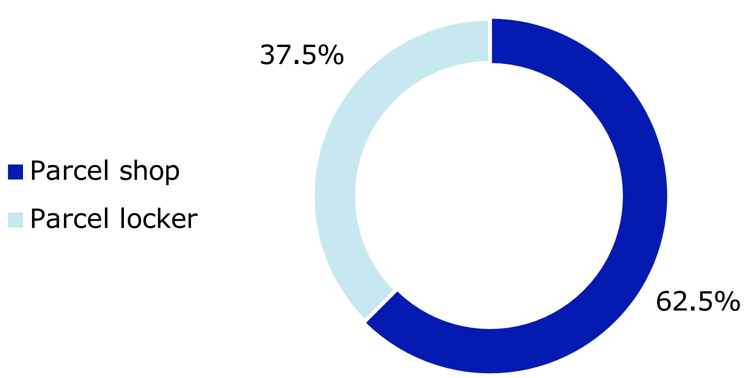
Preferred time slot for picking up the package at convenience points and lockers



The results show a clear preference for **convenience points over lockers** when both are located at the same distance: 62.5% of respondents choose the former, compared to 37.5% who prefer collection from a locker.

Locker are a more attractive option during **late hours,** probably because of their 24/7 availability

Preferred pick-up option (when both locations are equally close)



User experience in parcel pickup

One in three Spaniards who prefer the point of convenience do so because of personal customer service, the security of physical commerce and business hours.

Preferences revolve around **safety, personal assistance, and structured convenience.**

Reasons for preference for the point of convenience over the locker.

Reason for preference	Frequent User	Regular User	Casual user	Non-user	Total general
I am attended by a person if I have questions or need help	36.8%	36.3%	39.2%	29.1%	**36.6%**
It gives me more confidence to interact with a physical store	29.6%	34.2%	29.5%	37.4%	**32.5%**
I can pick up the package during business hours, including in the afternoon or The Weekend	34.8%	32.5%	32.1%	28.2%	**32.4%**
The convenience point is close to home or on the way to work	29.3%	32.4%	28.6%	19.6%	**30.0%**
I find it more reliable to know that someone is saving the package	31.8%	30.7%	28.2%	21.7%	**29.5%**
If there are any problems, I can check them directly on the site	21.6%	30.9%	28.5%	21.2%	**28.2%**
It's more comfortable for me than waiting at home	21.8%	24.7%	26.2%	14.1%	**23.9%**
I can combine the collection with other purchases or procedures in that store	17.1%	17.9%	14.1%	18.4%	**16.8%**
I avoid queues or waiting in traditional courier offices	16.9%	13.2%	14.7%	12.5%	**14.1%**
Other	2.9%	3.3%	3.3%	8.0%	**3.6%**
Average number of mentions	2.43	2.56	2.44	2.10	**2.48**

More than half of Spaniards who prefer a locker do so because of the possibility of picking up the package at any time

Other options include **avoiding queues or waiting** (47.2%) and **the speed of the process** (44.8%). The preference for the locker is based on three fundamental pillars: **time availability, agility and autonomy**.

Reasons for preference for the locker over the point of convenience

Reason for preference	Frequent User	Regular User	Casual user	Non-user	Total general
I can pick up the package at any time (24/7)	53.7%	54.3%	56.6%	29.4%	**53.2%**
I don't have to stand in line or wait to be seen	49.4%	48.4%	44.7%	36.6%	**47.2%**
It’s fast: I can open the locker in seconds using a code or an app	45.2%	48.3%	40.8%	25.9%	**44.8%**
I don't need to interact with anyone, it's completely autonomous	38.7%	30.5%	27.6%	22.5%	**31.4%**
I prefer to avoid business hours or crowded shops	27.8%	34.7%	29.1%	21.9%	**31.2%**
I find it very convenient if it is on my daily route (subway, supermarket, etc.)	18.8%	22.4%	16.3%	9.6%	**19.6%**
I like to have full control of when and how I pick up the package	19,00%	20.9%	15.9%	13.5%	**19,00%**
It's more discreet and private	16.5%	19.6%	20.3%	13.5%	**18.7%**
I usually have a locker near home or work	13.9%	19.5%	12.5%	6.3%	**16,00%**
Other	0.7%	1.3%	2.4%	6.1%	**1.7%**
Average number of mentions	2.84	3.00	2.66	1.85	**2.83**

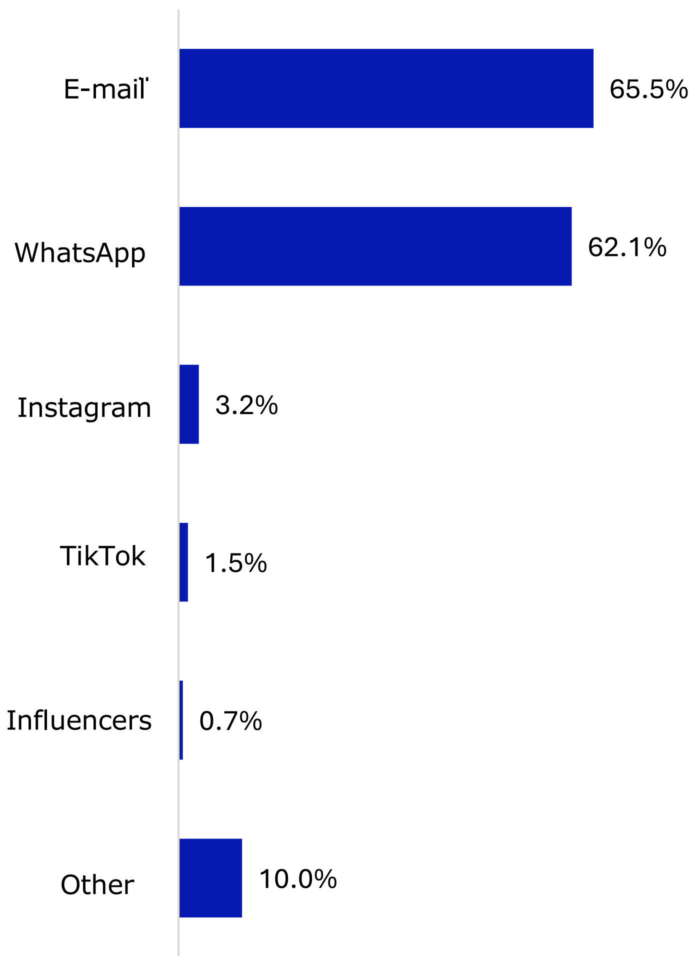
Contact preferences for parcel delivery companies

E-mail (65.5%) and **WhatsApp** (62.1%) **stand out as the means most valued by users**, **by far compared to the rest of the options**, to receive communications from delivery companies. This choice reflects a demand for accessible, non-intrusive communication.

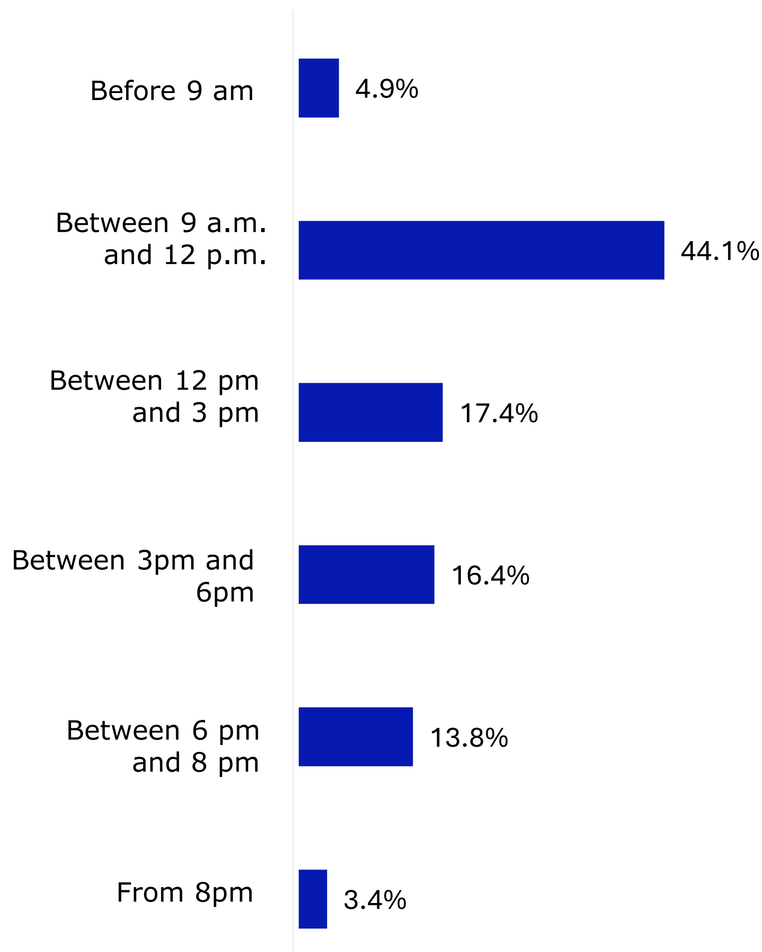
The clearly preferred time slot to be contacted by delivery companies is **between 9 a.m. and 12 p.m. (44.1%)**, well above the rest of the time slots.

4 out of 10 users prefer to be contacted between 9 and 12 in the morning, well above the rest of the time slots.

Preferred communication channels



Preferred Contact Time



The most frequent users are more likely to accept minority communication channels, such as **Instagram** (5.7%), **TikTok** (3.2%) and even **influencers** (2.3%)

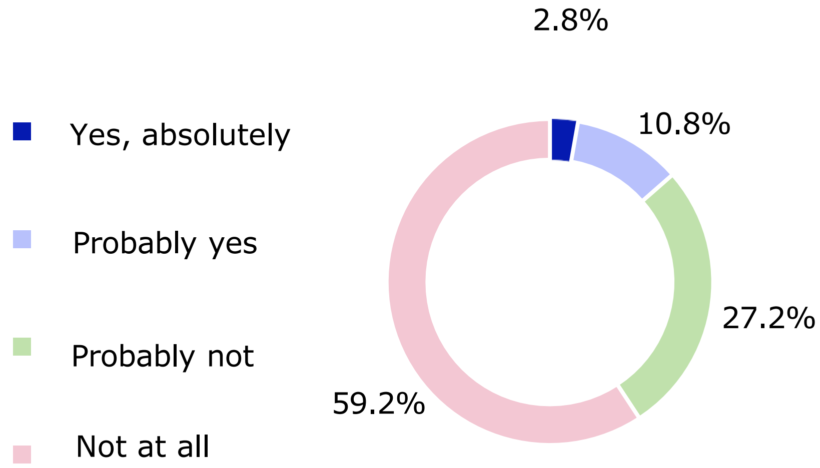
Payments and conditions for parcel delivery at convenience points

There is a low willingness to pay an additional fee to receive packages at a convenience point or locker instead of at home.

60% of Spaniards would not pay more for their shipment to be delivered to a convenience point or locker

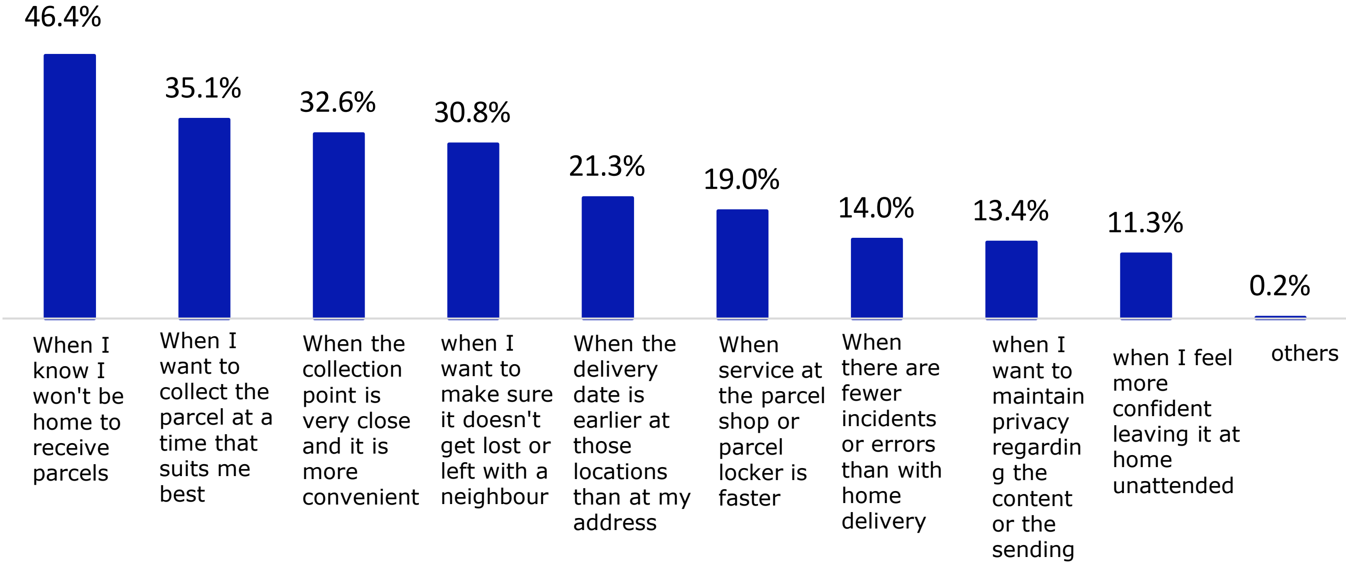
A scant **13.6%** would be willing to pay more to receive their packages in these places

Willingness to pay more to have the shipment delivered to a convenience point or locker, rather than having delivery delivered to the home



The reasons are clear: **46.4% would do so when they know that they will not be at home**. It is followed by **flexible hours** (35.1%), **comfort or proximity** (32.6%) or the **security of receiving** it (30.8%).

Cases in which there is a willingness to pay more



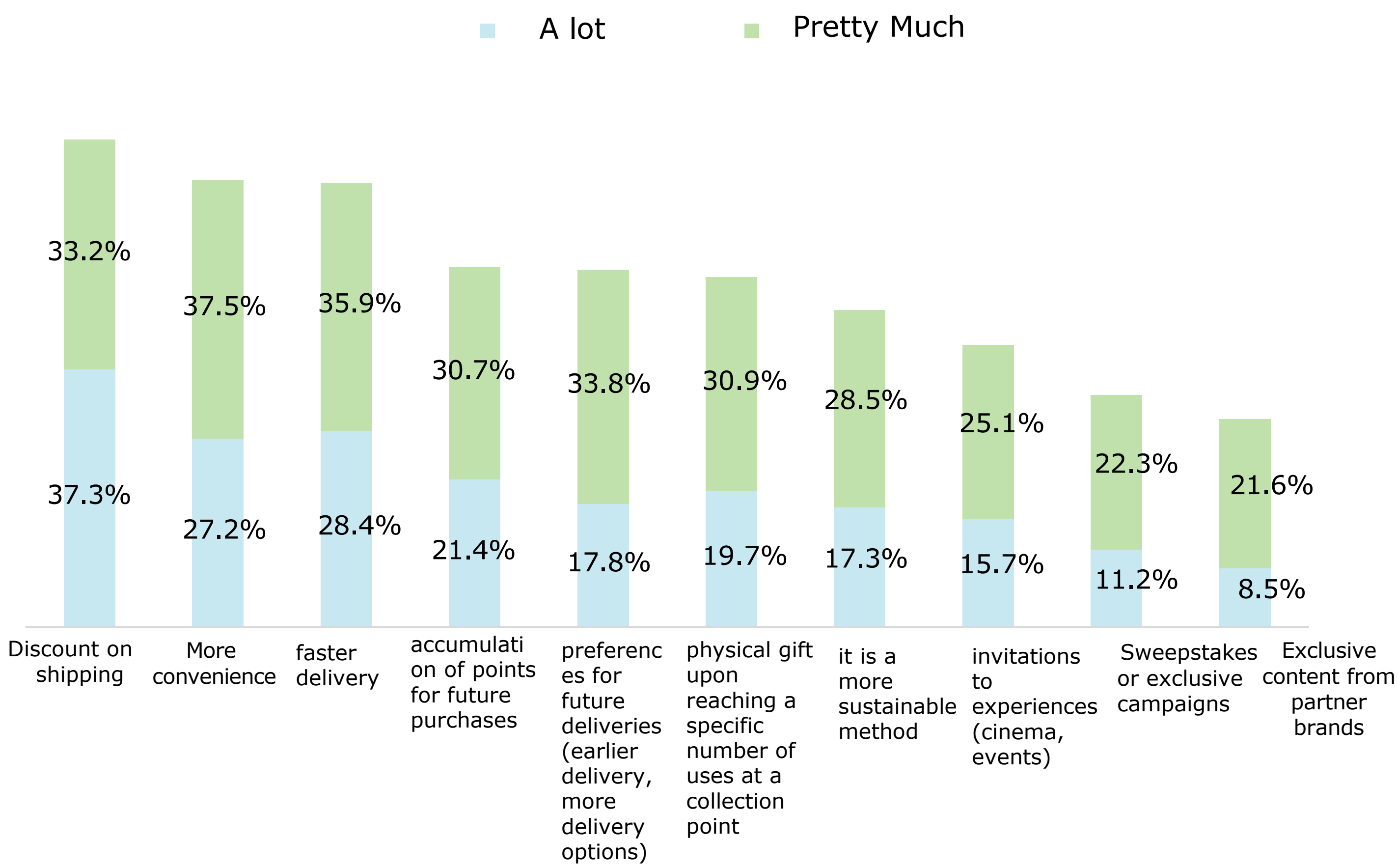
Incentives to increase the use of collection points

Incentives that improve **efficiency**, save **money or give** them greater control, **such as greater convenience** (64.7%) and **speed of delivery** (64.3%), would motivate users to use collection points more frequently.

The choice of convenience point or locker is more linked to functionality than to the value of the order: half of Spaniards would be willing to refer their orders to a collection point regardless of the amount

7 out of 10 Spaniards say that the discount on shipping is the biggest incentive to use these collection points.

Percentage to which the following incentives would motivate you to use the collection points more frequently.



The majority of users (49.7%) would be willing to refer their orders to a collection point regardless of the amount of the cost of the order, as long as it is more convenient for them, which reinforces the idea that the choice of convenience point or locker is more linked to functionality than to the value of the order.

02

Expectations and perceptions of the future

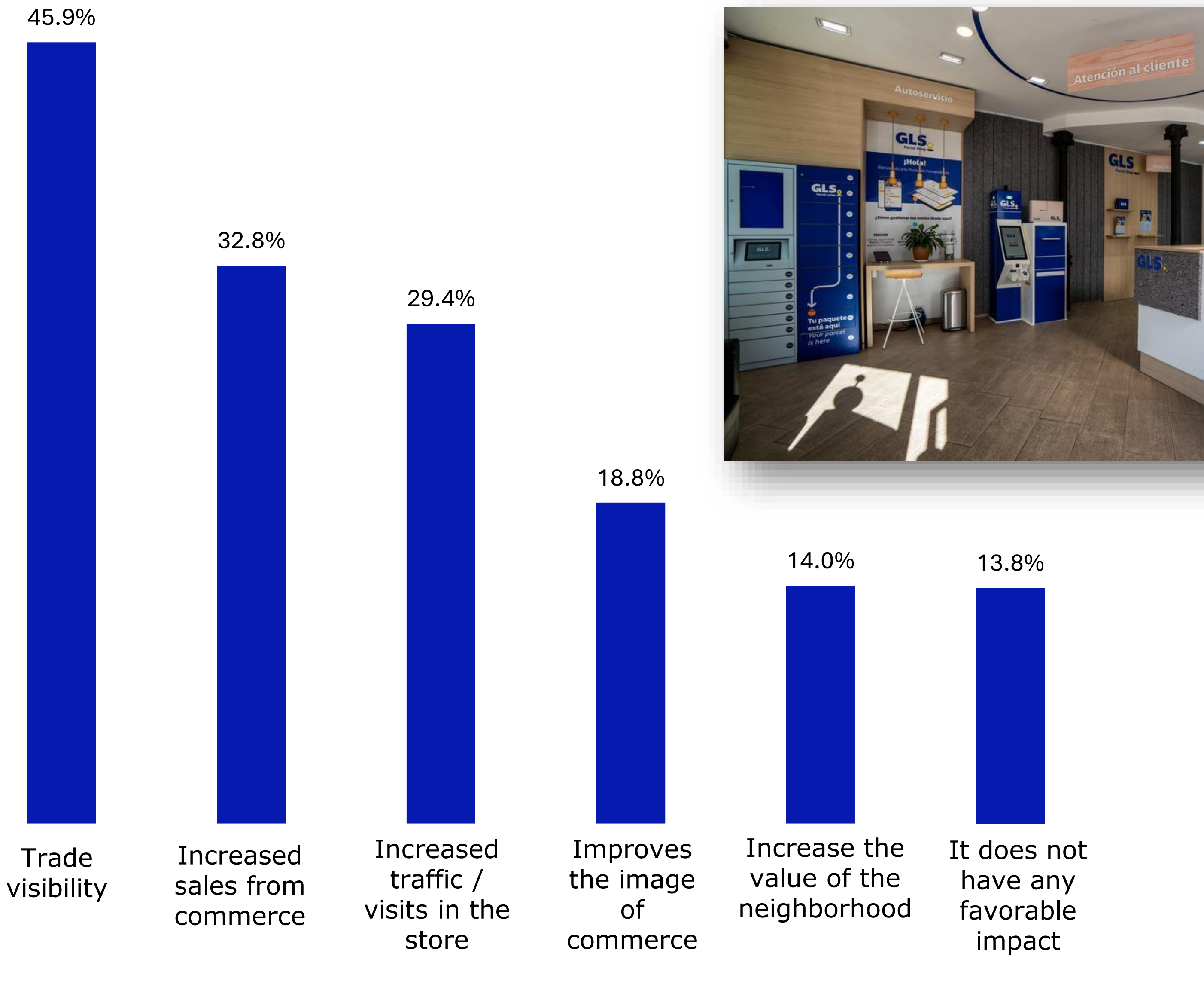
Aspects that generate a favourable impact on local businesses thanks to the collection of shipments

Users identify the convenience point as a tool that energizes the life of local commerce: The general perception of the **positive impact of collection points in local businesses** is remarkably favourable.

The most recognized aspect is the **increase visibility of local businesses** (45.8%), followed **by increase sales** (32.8%) and **increased foot traffic to the establishment** (29.4%), indicating that users identify the convenience point as a tool that energizes the boosts local commerce.

86.2% of Spaniards consider that the collection of shipments from local businesses has a favourable impact

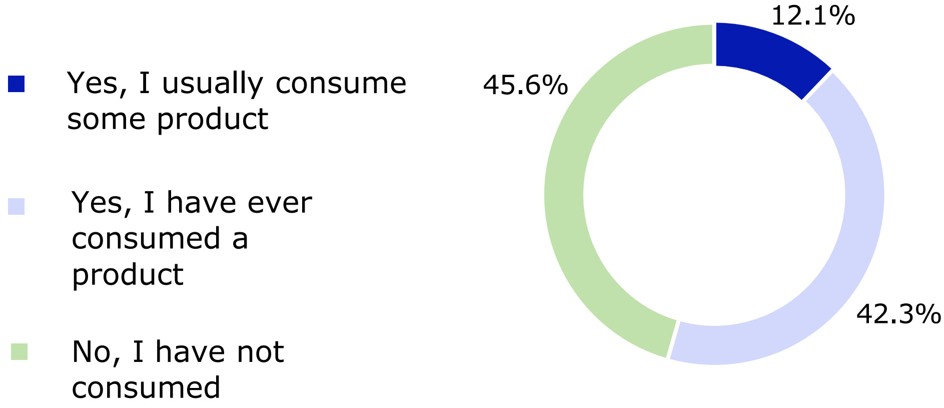
Percentage that mentions each aspect as a result of the favourable impact of the collection of shipments in local shops



Consumption of own products in local shops enabled for the collection of shipments

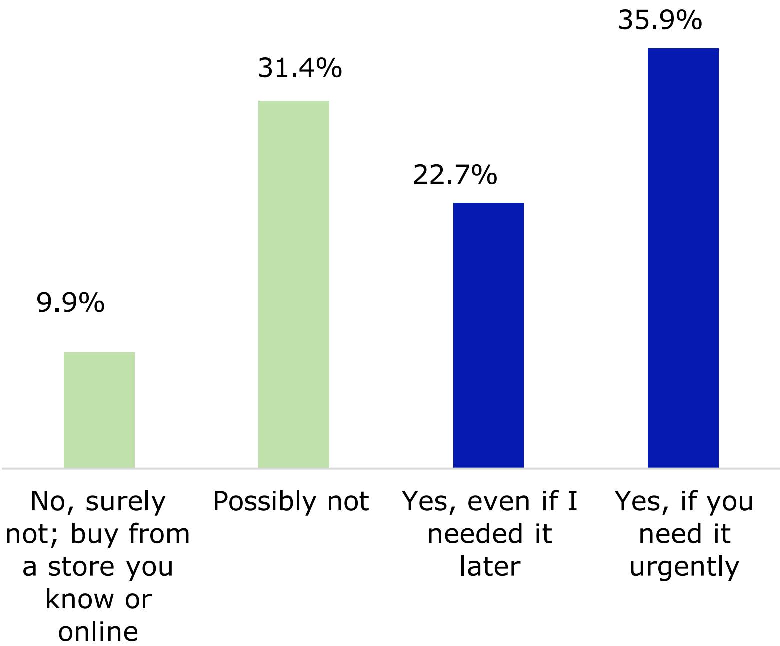
There is a commercial effect linked to the point of convenience, 42.3% of users do it occasionally and 12.1% regularly.

Distribution of users, according to whether they consume any product at the collection point



More than half of the users (54.4%) have consumed a product at some point of collection

Percentage that would buy and not some product at the collection point



Of those who have never consumed them, **more than half would** be willing to buy a product, although **4 out of 10** are more reluctant to do so

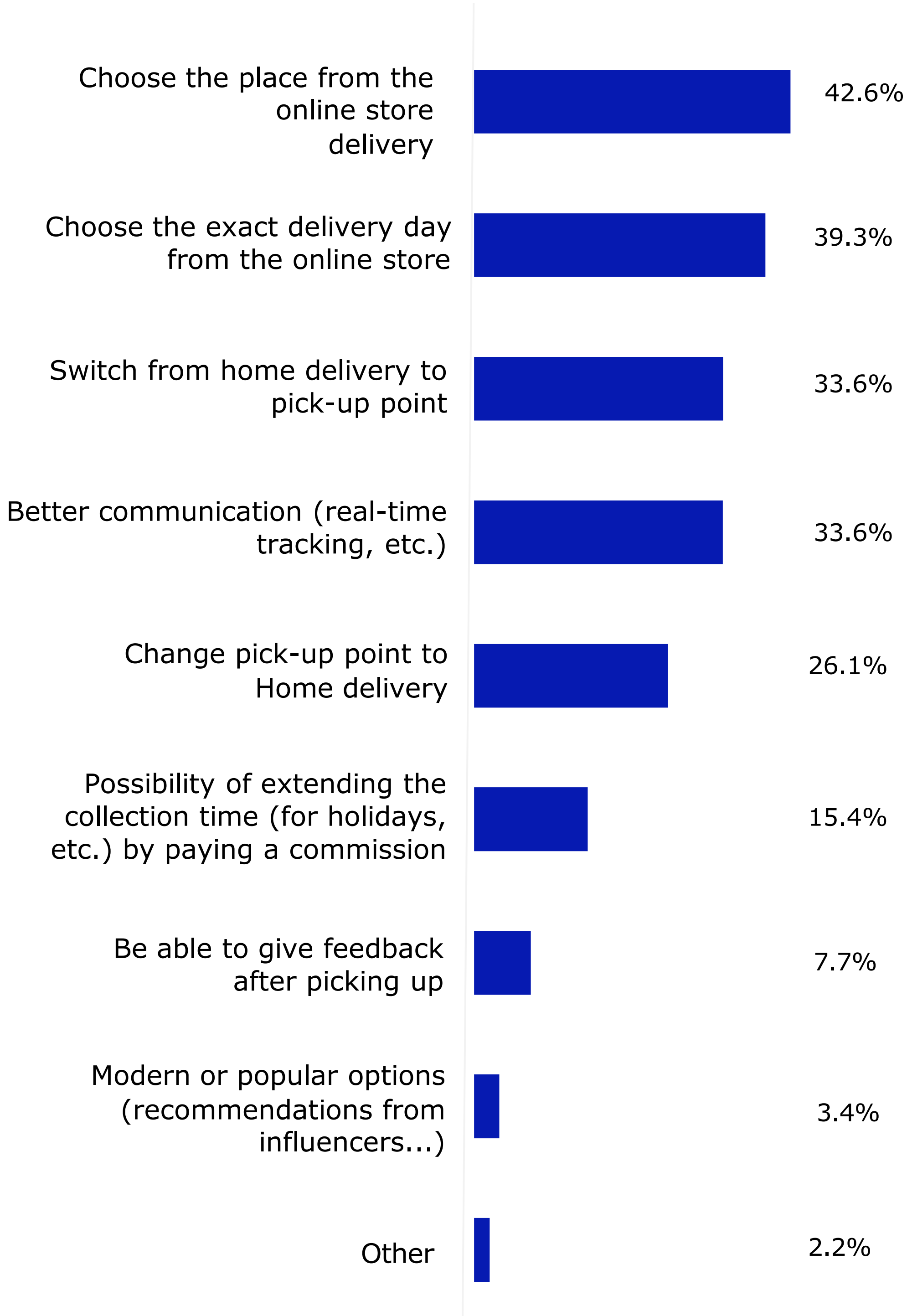
Improvements to the parcel delivery experience

The most valued aspects to improve the delivery experience are focused on **flexibility and control by the user**.

Topping the list are the ability to choose the delivery location from **the online store** (42.6%) and the exact day of delivery (39.3%), followed by improvements in real-time communication and tracking (33.6%) and the ability to switch home delivery to **a point of convenience** (33.6%).

These preferences indicate a clear demand for service personalization**.**

Things to improve the delivery experience



4 out of 10 Spaniards choose to choose the delivery location from the online store to improve the user experience

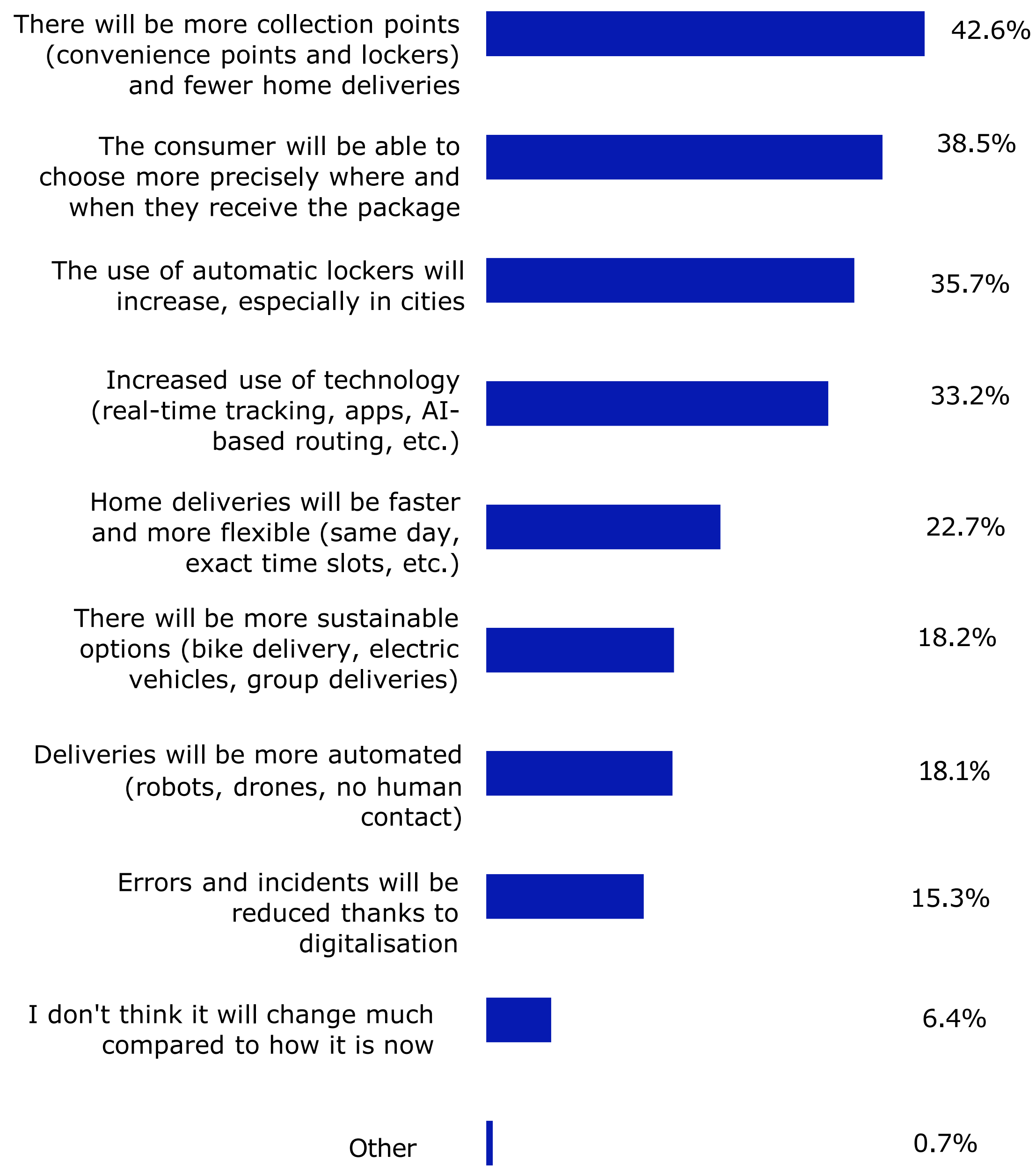
Improvements to the parcel delivery experience

Greater consumer choice is expected (38.5%) and **an increase in the use of lockers in urban environments** (35.7%).

Three out of ten anticipate a more intensive use of technologies such as apps, real-time tracking or artificial intelligence, in a generalized expectation of digitization and personalization of the process.

More than half would value a **delivery scheduled in the future** for when they were not at home.

Perception of the evolution of parcel delivery in the next five years



42.6% say that in the future, **there will be more pick-up points and fewer deliveries to domicile**

03

Conclusions

Conclusions

The out-of-home (OOH) parcel collection model is firmly established in Spain as an efficient and practical alternative**.**

With high growth potential.

Although understanding of logistics terminology remains limited**, the positive experience of users, its impact on local commerce and the expectations of a more digital and autonomous future position GLS as a key player to lead this logistics transformation.**

01 **The use of convenience points and lockers is growing,** highlighting convenience as the main motivator.

02 **The point of convenience** is preferred for its **personal assistance and proximity.**

03 **Points of convenience** support local commerce and encourage additional purchases.

04 **The future points to more digitalization, autonomy** and less dependence on home delivery.

Does your e-commerce allow your customers to pick up and return packages at nearby stores and lockers?

More and more buyers prefer this option.

Keep growing with GLS solutions

GLS Solutions: **ShopDeliveryService** & **ShopReturnService**

- Integrate GLS Points (convenience point and locker) into your store easily.
- Available for domestic and international shipments.
- 8.700 + points in Iberia and 124.900 + in GLS Group.
- Label-free returns using a QR code.

With GLS, your ecommerce offers the flexibility and confidence your customers expect.

Want to know more? Contact us

We are part of the **Iberian GLS network, a unique agency model in Europe.**

Experience of approximately 620 **local transport specialists.**

Internationally capable, through its own subsidiaries and partners, the GLS Group covers more than 50 countries.

About the study

A representative analysis of the Spanish population

01

Who do we ask?

3,513 online interviews with the population aged 18 and over throughout Spain.
Representative sample by age, sex and autonomous community.
Margin of error: ±1.7%, with 95.5% confidence.

02

When did we do it?

Between May 30 and June 9, 2025.

03

How did we do it?

Digital surveys (CAWI), lasting about 16 minutes. Structured questionnaire that combines objective data (frequency of use, habits) with emotional insights (motivations, expectations, perceptions of the future).

04

Why did we do it?

To understand the perception, habits and expectations of Spaniards regarding the Out Of Home (OOH) model.
With a focus on GLS's knowledge of competitors, the role of local commerce and the evolution of deliveries in the coming years.

This study is a complete x-ray of the Spanish consumer in the new era of out-of-home delivery: what they know, how they use it and what they expect from the future of logistics

www.gls-group.com/ES/