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URBAN MARKETING

FREE REPORT

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SPECIAL OOH · EUROPE · 2026

The OOH Media-Planner's Report.

The numbers that moved in 2026 — and what each one means for your next campaign. Every figure cited.

A curated field guide by Echo Poster

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HOW TO USE THIS REPORT

Most trend reports give you numbers. This one gives you the numbers and what to do with them.

Part one is the data pack — the state of OOH in 2026, by market and theme, every figure sourced and dated. Part two takes the seven trends that shaped the year and translates each into a planning implication: what it changes for your next brief. Part three is a one-page decision aid — which format fits which goal.

We plan, produce and run OOH across Germany, the UK and Italy. The interpretation here is the part a data sheet can't give you — read it as a starting point for the conversation, not a substitute for it.

PART 1 · THE STATE OF OOH 2026

The numbers, by market

MARKET & GROWTH

MARKET	NUMBER	SOURCE
Global	OOH revenue **$54bn (+15%)**; **DOOH = 47%** of OOH revenue (first time)	WOO (2026)
Germany	DOOH **+25%**, **43% share** of national OOH, ~**€1.7bn**	Nielsen DE (Jan 2026)
Germany	OOH H1 **+10.6%**, **10.1% of the total ad market** (first time)	FAW/Nielsen (H1 2025)
US	Record **$9.46bn (+3.6%)**; DOOH **36.3% (+10.5%)**	OAAA (2025)
US	Q1 2026 **$2.12bn (+7.1%)**; DOOH +12.9%	OAAA (Q1 2026)
UK	Record **£1.44bn**; DOOH **67%** (2015: 32%), 75% forecast by 2027	Route/PwC (2025)
UK	Q1 2026 **£341.2m (+15%)**; DOOH +17.6%	Outsmart/PwC (Q1 2026)

PROGRAMMATIC DOOH

NUMBER	SOURCE
pDOOH **$1.4bn 2025 = 7%** of DOOH (PwC-audited); Americas 14.2% / EMEA 9.4% / APAC 1.7%	WOO/PwC (2026)
Investment **+44%** expected (18mo); **48%** of campaigns will include it (from 34%)	VIOOH (2026)
UK: **64%** of buyers plan to increase pDOOH — ahead of CTV (42%)	Vistar Media (2026)

PART 1 · THE STATE OF OOH 2026

The numbers, by theme

MEASUREMENT & EFFECT

NUMBER	SOURCE
OOH delivers **2× the performance lift of TV**; frequency 1→10 = **7.1× conversions**	OAAA/Kochava (2026)
74% reach for their phone after a DOOH contact; 76% took an action	OAAA/Harris (2024)
Contextually relevant messaging: **+17% effectiveness** (+18% neural, +16% sales)	The Moments of Truth study (multi-yr)
67% perceive 3D-OOH brands as premium; **58%** would share a 3D billboard	Harris/OUTFRONT (2023)

RETAIL MEDIA & ENVIRONMENTS

NUMBER	SOURCE
98% of marketers see OOH as foundational to connected commerce; 86% plan budget rises	OAAA/Winterberry (2026)
Co-op UK: **>1,000 screens**, now 4th-largest DOOH operator UK	Outsmart (2026)

Excluded pending primary sources ([Refresh]): eMarketer 45.2%-by-2028, DE pDOOH ~40%, Green-GRP CO_2, FOOH reach figures — we don't cite what we can't source.

TREND 01

DOOH tips the majority

THE NUMBERS

DOOH is now **47%** of global OOH revenue and about to overtake static. Germany already **43%** (Nielsen), the UK **67%** (Route/PwC). Frankfurt Airport's Terminal 3 opened DOOH-native — 230 surfaces digital from the blueprint.

WHAT IT MEANS FOR YOUR PLAN

Plan for a digital-first inventory mix, but don't abandon static — the markets that grew fastest (UK) did it with digital *on top of* a classic base, not instead of it. Ask your media owner what share of your target locations is already digital; where it isn't yet, static still owns the frame.

Source: WOO, Nielsen DE, Route/PwC, invidis (2026)

TREND 02

Programmatic DOOH grows up

THE NUMBERS

First independently validated measurement: **$1.4bn 2025 = 7% of DOOH** (WOO/PwC). Demand runs ahead: **+44%** expected investment, **48%** of campaigns will include pDOOH (VIOOH). UK buyers now put pDOOH ahead of CTV (Vistar).

WHAT IT MEANS FOR YOUR PLAN

Programmatic is worth it when the data does a real job — daypart, weather, a store within 500m — not as a buzzword. If your brief has a contextual trigger, pDOOH earns its premium. If it's a flat always-on message, classic buying often delivers the same effect with less complexity.

Source: WOO/PwC, VIOOH State of the Nation, Vistar Media (2026)

TREND 03

Agentic AI & dynamic creative

THE NUMBERS

a Canadian DOOH platform provider ran the first **end-to-end agentic-AI OOH media buy** (May 2026). MagentaTV's MagentaTV's Toralarm pushed AI-compiled goals to **3,500+ screens within 3 minutes**. Contextually relevant messaging lifts effectiveness **+17%**.

WHAT IT MEANS FOR YOUR PLAN

The lever isn't the AI — it's the trigger and the creative variants behind it. Before the tech matters, decide what real-world signal (weather, time, location, live event) should change your message, and brief the variants. Most “AI DOOH” underperforms because there's one creative and nothing to switch to.

Source: provider announcement (May 2026), meedia, The Moments of Truth study

TREND **04**

Retail media & new environments

THE NUMBERS

98% of marketers now see OOH as foundational to connected commerce (OAAA/Winterberry). In-store DOOH broke through in Germany (REWE, Edeka, OBI); Co-op UK launched **>1,000 screens** in one move.

WHAT IT MEANS FOR YOUR PLAN

The last meter before the shelf is now buyable OOH. If you sell through retail, a screen at the store entrance closes the loop that a roadside poster opens. Map your path-to-purchase and place OOH at both ends — awareness on the street, reminder in the aisle.

Source: OAAA/Winterberry, invidis, Outsmart (2026)

TREND 05

OOH becomes a performance channel

THE NUMBERS

Across hundreds of campaigns, device-level: OOH delivered **2× the performance lift of TV** (OAAA/Kochava). Frequency 1→10 exposures = **7.1× conversions**. **74%** reach for their phone after a DOOH contact.

WHAT IT MEANS FOR YOUR PLAN

Stop treating OOH as unmeasurable branding. Set a measurement plan up front (mobile-location or brand-lift), and respect frequency — a single exposure barely moves the needle; the compounding starts around 5–10 contacts. Budget for frequency in fewer, better locations rather than thin coverage everywhere.

Source: OAAA/Kochava, OAAA/Harris Poll (2024–2026)

TREND 06

Physical spectacle: 3D, special builds & mobile

THE NUMBERS

67% perceive 3D-OOH brands as premium; **58%** would share a 3D billboard (Harris/OUTFRONT). The Whale (Hamburg, 342m²) and Melbourne Metro's 16×4.5m forced-perspective screen mark the digital end; special builds, inflatables and mobile media the physical end.

> WHAT IT MEANS FOR YOUR PLAN
>
> This is the trend with the highest earned-media ceiling and the widest budget range — a special build or a routed vehicle isn't reserved for landmark budgets. The decision that matters is the address: the right site beats the big site. Pick the format by the goal, not the spectacle.

Source: Harris Poll/OUTFRONT, Horizont, Mi3 (2023–2026)

TREND 07

Live moments & tentpole events

THE NUMBERS

2026 is a World Cup year and OOH is its real-time medium: Toralarm's 3-minute goal turnaround on 3,500 screens is the template — the event happens and the street reacts before the highlight reel is cut.

WHAT IT MEANS FOR YOUR PLAN

Don't just “buy the final.” Build the capability to react in public the moment something happens — a pre-cleared site, approved creative variants, and a media owner who can flight fast. The value is being live in the street while the moment is still hot, not advertising around it afterwards.

Source: meedia, OAAA (2026)

PART 3

Which format fits which goal

A starting map, not a rulebook — the right answer always depends on address, timing and creative. (Price drivers: format, location, run length, share of voice — we work those in the conversation, not on a sheet.)

IF YOUR GOAL IS...	LEAD FORMAT	WHY
Broad awareness, fast reach	**Classic large format + DOOH network**	Coverage + frequency at scale
Context / performance	**Programmatic DOOH**	Daypart / weather / geo where data does a job
Earned media / sharing	**3D DOOH or special build**	Highest share-and-photograph ceiling
A moving / event audience	**Mobile media**	The surface goes to the audience
Deep brand experience	**Experiential / activation**	The campaign people walk into
Point-of-sale conversion	**Retail media / in-store DOOH**	The last meter before the shelf
React to a live moment	**Programmatic + pre-cleared site**	Live in the street while it's hot

The one rule under all of them: the address beats the size. A smaller, right location out-performs a bigger, wrong one.

FROM THE NUMBERS TO THE STREET

We plan, produce and run all of it.

The report is the thinking. This is the doing — end to end, from the media plan and the permit to running it in public space across Germany, the UK and Italy.

Media planning & buying

Direct from media owners, digital and classic — the mix that fits the goal, not the rate card.

Special Builds & 3D

Special constructions and large-format work, premium by design, in places brands rarely reach.

Mobile Media

LED trucks, holo trucks, LED bikes, wrapped vehicles — the surface that drives to the audience.

Experiential & Activations

Concept, production, curated staff, operation — and social-ready material that scales the moment.

Own. Buy. Build. Run. — we own key OOH inventory, buy the rest direct, build what can't be booked, and run it in public space.

YOUR NEXT MOVE

Which of these numbers changes your next brief?

Send us the goal. We'll come back with the format, the location and the feasibility — no sales pressure, just the eyes of the people who build it.

Start a conversation → echoposter.com

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