

Global Out-of-Home Ad Revenues Up 7.5% to \$56B in 2018, Strongest Growth Since 2007; Consumer Time Spent With OOH Rises 1.3% to 1 Hr & 7 Mins, Driven By Digital Signage

Global out-of-home advertising revenues, including digital and traditional OOH media, grew 7.5% to \$56.0 billion in 2018, as consumer time spent with OOH media increased 1.3% to 1 hour and 7 minutes per week, according to new research from PQ Media.

Global out-of-home (OOH) advertising revenues, including all digital, traditional and ambient media platforms, increased an estimated 7.5% to \$55.99 billion in 2018, the fastest growth rate in 11 years, according to new research from [PQ Media](#). Key industry growth drivers included an increase in live ad-supported updates during major global sporting events, which led to higher consumer engagement with digital OOH media, as well as the strength of traditional OOH, particularly in transit locations.

While global OOH revenues are pacing for decelerated 5.4% growth this year in the absence of key global sporting events and political campaigns, as well as slowing economic growth in the second half, PQ Media analysts anticipate an 8.5% growth surge in 2020, the fastest expansion in more than a decade, according to [PQ Media's Global Out-of-Home Media Forecast 2019](#).

Meanwhile, consumer exposure to overall OOH media grew 1.3% worldwide in 2018 to an average of 1 hour and 7 minutes per week, driven by more consumer viewing of content related to the World Cup and Olympics, continuous coverage of key news events and political campaigns globally, and acquisition activity that expanded the scale of market-leading OOH operators, according to PQ Media.

“Our research indicates that brands and agencies are turning to OOH media more than ever, which has made it one of the fastest growing ad-driven media worldwide, both in operating company revenues and consumer exposure time,” said PQ Media President Patrick Quinn. “Media buying across multiple OOH networks has become easier through programmatic technology and brand marketers are finding that their messages are less likely to appear near objectionable content via OOH media, a drawback that is frequently cited in relation to the use of online and mobile advertising and marketing.”

PQ Media defines OOH by two broad media platforms – digital out-of-home (DOOH) and traditional & ambient OOH. Within DOOH are two channels: digital place-based networks (DPNs), screens that combine content and ads in venues like doctor’s office, elevators and gas pumps; and digital billboards & signage (DBBs), signage that changes ad messages at predetermined intervals, like roadside billboards on a 30-second loop. Traditional OOH includes static billboards, street furniture and transit posters, as well as ambient OOH media, including ads placed on objects, non-traditional vehicles, and in unique locations.

Based on pacing through the first eight months of 2019, DOOH was driving overall OOH growth worldwide, increasing at an estimated 10% to almost \$16.75 billion estimated for the full year. DOOH is estimated to command a 28.3% share of overall OOH revenues by year-end 2019, up from 20.7% in 2013. DPNs are the larger of the two DOOH channels, exceeding \$11.4 billion globally in 2019, and posting 9.9% growth, while DBBs will rise a slightly higher rate during the year, increasing 10.3% to over \$5.25 billion, according to PQ Media’s Global Out-of-Home Media Forecast 2019.

Meanwhile, traditional & ambient OOH is projected to be up 3.7% in 2019 to more than \$42 billion. Traditional OOH is the largest of the four OOH channels, reaching almost \$39 billion in 2019, posting a 3.5% gain, while ambient OOH is the smallest channel at slightly below \$3.4 billion worldwide, though it is expected to rise at a faster 6.4% rate in 2019.

The six largest global OOH media companies – JCDecaux, Clear Channel Outdoor, Focus Media, Stroer, Lamar and Outfront Media – were the only OOH operators to exceed \$1 billion in revenues in 2018, with newly- formed Global OOH, which purchased UK-based Ocean Outdoor and others, was the only operator to surpass \$500 million. Eight other global OOH operators generated revenues of more than \$150 million, resulting in the Top 15 operators accounting for 30.3% of worldwide OOH ad revenues.

The United States is the largest market in overall OOH and digital OOH but has dropped to second behind China in traditional & ambient OOH in 2018. Overall, the United States market reached almost \$10.5 billion in 2018, and nearly \$11 billion in 2019. China is close behind at over \$10.3 billion in 2018, while Japan exceeded \$8 billion. Other markets to exceed \$1 billion include the United Kingdom, Germany, France, Russia, Brazil, Australia and South Korea. Six markets registered double-digit growth in 2018, led by Brazil at 15.2%, followed by South Korea, Argentina, Australia, South Korea and China, according to PQ Media’s Global Out-of-Home Media Forecast 2019.

Brazil’s strong growth in 2018 was influenced by a strengthening economy amid political controversy, reaching the quarterfinals of the FIFA World Cup, and major cities like Sao Paulo lifting sanctions against roadside DBBs. South Korea ranked second in growth, fueled by the high CPM rates charged during the Winter Olympics it hosted to “official sponsors” at or near key Olympic venues, as well as in transit and entertainment venues that featured live updates.

Transit remained the hottest location category due to many nations upgrading airport terminals, adding new rail lines and deploying digital street furniture signage in high-traffic areas popular with tourists. Due to growing DOOH and transit OOH networks, consumer time spent with all OOH media increased for the seventh consecutive year in 2018, and similar growth is expected this year. Among future growth drivers will be programmatic media buying expanding to mid-tier operators and the use of mobile integration and more eye-dwell technology to improve ROI metrics.

About the Forecast:

[PQ Media’s Global Out-of-Home Media Forecast 2019](#) is the 11th edition in this groundbreaking industry benchmark series, which remains the world’s premiere source for comprehensive market research covering OOH advertising revenues and consumer time spent with OOH media by country, platform and channel. The new Forecast includes a Core PDF Report (in PowerPoint format) delivering over 400 slides of original data, analysis and datagraphs, with in-depth profiles of the Top 20 OOH markets worldwide.

Also included is a massive Companion Excel Databook, delivering several hundred drill-down datasets and over 13,000 actionable datapoints to provide the industry’s deepest dive available anywhere by global region, individual country, OOH platform, media channel and venue category. To download a FREE Executive Summary, Table of Contents and Sample Datasets from the new Forecast, please click:

<https://www.pqmedia.com/product/global-out-of-home-media-forecast-2019/>

About PQ Media:



[PQ Media](#) delivers intelligent data and analysis to executives at the world's leading media, entertainment and technology organizations through syndicated market research, custom market intelligence and strategic advisory services. PQ Media uses a proprietary econometric methodology to define, segment, size and project growth across more than 100 digital, traditional and alternative media platforms and channels by global region, country, media platform, channel, gender and generation group.



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