Global out-of-home (OOH) advertising market, segmented by forecast digital OOH (DOOH) penetration in 2019, and rate of growth in total OOH advertising revenue, 2014–2019

Out-of-home advertising


Methodology note:
Each market's location within the quadrant is calculated by assessing their forecast penetration of digital OOH advertising revenue in 2019, and then dividing the markets in terms of their average growth rate in total OOH advertising revenue between 2014 and 2019.

**Higher DOOH advertising revenue penetration, higher growth in total OOH advertising revenue**

In these markets, high and growing digital advertising revenue penetration is helping to drive total OOH advertising revenue growth. Some, including the US and Sweden, are mature markets where increased revenue from DOOH advertisements are ensuring sustained growth. The majority, however, are less mature markets such as China, Brazil and Turkey, where new construction and infrastructure equipped with DOOH formats is driving both digital penetration and overall revenue growth.

Note: Markets where digital OOH advertising revenue penetration will be 35% or higher in 2019, and where total OOH advertising revenue is growing at a CAGR of less than 4% to 2019.

**Higher DOOH advertising revenue penetration, lower growth in total OOH advertising revenue**

In these markets, DOOH is well established. In some, including the UK and Singapore, DOOH is largely saturated in some areas. With the most profitable locations already upgraded to digital formats, revenue increases from digitisation have slowed. Nonetheless, all of these markets will see positive growth over the forecast period.

Note: Markets where digital OOH advertising revenue penetration will be 35% or higher in 2019, and where total OOH advertising revenue is growing at a CAGR of 4% or more to 2019.

**Lower DOOH advertising revenue penetration, lower growth in total OOH advertising revenue**

These are largely mature markets, including France and Italy, where a lack of economic confidence has discouraged providers from investing in upgrading to DOOH. This in turn reduces the long-term revenue potential in these markets, further slowing growth. This quadrant also includes some less mature markets such as Egypt and Pakistan, which currently lack the infrastructure to make DOOH feasible and cannot grow revenue from traditional formats due to economic or political conditions.

Note: Markets where digital OOH advertising revenue penetration will be lower than 35% in 2019, and where total OOH advertising revenue is growing at a CAGR of less than 4% to 2019.

**Lower DOOH advertising revenue penetration, higher growth in total OOH advertising revenue**

These comprise predominantly less mature markets such as Indonesia and Nigeria, where DOOH remains nascent. This may be for a variety of reasons including poor electricity supply, lack of security and cost. Nonetheless, strong economic and population growth ensures that DOOH revenue continues to rise quickly as both the size and spending power of the audience for OOH advertising grows.

Note: Markets where digital OOH advertising revenue penetration will be lower than 35% in 2019, and where total OOH advertising revenue is growing at a CAGR of 4% or more to 2019.

Source: Global entertainment and media outlook 2015 –2019, PwC, Ovum


Methodology note: Each market’s location within the quadrant is calculated by assessing their forecast penetration of digital OOH advertising revenue in 2019, and then dividing the markets in terms of their average growth rate in total OOH advertising revenue between 2014 and 2019.