WORLD OUT OF HOME ORGANIZATION

WOO GLOBAL pDOOH EXPENDITURE STUDY 2026

Geography & Country Rankings

September 2026

Full Year 2025 | Independent Aggregation

REPORT 1 OF 2

$1.339bn	**7.0%**	**12**
Global pDOOH Adspend	of Total DOOH	SSP Participants

WORLD OUT OF HOME ORGANIZATION

Data: WOO Global pDOOH Expenditure Study 2026 (v.07/08/26) | Published September 2026

Figures are indicative market estimates from aggregated SSP submissions. Individual operator data not disclosed.

CONTENTS

WOO Global pDOOH Expenditure Study 2026 — Report 1

Source: PwC / WOO Global pDOOH Expenditure Study 2026 (v.07/08/26). Figures are indicative market estimates prepared from aggregated SSP submissions. Not audited. Individual operator data is not disclosed.

FOREWORDS

Tom Goddard

President, World Out of Home Organization

One of WOO's core commitments is to invest in the data and measurement infrastructure that the global out-of-home industry needs to grow with confidence. The Global OOH Expenditure Survey has served that purpose for total OOH spend across more than seventy markets. This study extends that commitment to the programmatic segment — which has grown rapidly enough, and matters enough to our members and to buyers worldwide, to warrant its own dedicated and independently aggregated measurement.

What makes this report possible is not WOO acting alone, but the willingness of twelve supply-side platforms to contribute confidential revenue data to a shared, independently aggregated dataset. That kind of industry collaboration is not straightforward to achieve — it requires trust in the process, trust in the independent aggregator, and a shared belief that what is good for the channel is more important than any individual commercial interest. The SSPs who participated here demonstrated all three.

The result is a genuine first: an independently aggregated, supply-side picture of global pDOOH expenditure drawn from actual SSP transaction data — not modelled from third-party proxies. This first report covers the geography of the market. The companion report — Report 2: Verticals, DSP & Transaction Analysis — follows within the fortnight, completing the picture with a structural view of how pDOOH is traded.

WOO's thanks go to all twelve participating SSPs, to PricewaterhouseCoopers for their independent expertise, and to everyone across the WOO team and membership who contributed to bringing this initiative to publication.

Charles Parry-Okeden

VP & Global Lead — Audience Measurement & Data, World Out of Home Organization

Programmatic DOOH is one of the fastest-growing segments in global advertising, yet until now the industry has lacked independently aggregated, supply-side data on its true scale. Estimates have existed — but estimates drawn from models or surveys are not the same as numbers derived from actual transaction records. The purpose of this study is straightforward: to provide the industry with data it can trust.

The study is structured as two complementary reports. This first report maps the geography — where global pDOOH spend is concentrated, how markets compare and where the greatest growth potential lies. The second report, which follows in the coming weeks, examines the structural picture: which advertiser verticals are spending, how inventory is being accessed and what the distribution of deal types tells us about market maturity. Neither is complete without the other.

The quality of the data in both reports is a direct result of the SSPs who chose to participate. Contributing confidential revenue data to an independently aggregated industry dataset is a meaningful commitment, and the fact that twelve platforms came forward for this inaugural study speaks well of the collaborative spirit within the programmatic OOH ecosystem. PwC's involvement as independent aggregator is what translates that contribution into numbers the wider market can rely on.

The methodology is deliberately conservative — transparent about the boundaries of the dataset and what can be concluded within them. The result is the most credible global pDOOH measurement available. The programme will only improve as participation grows and the time series lengthens.

Gideon Adey

Principal, GUROOH

WOO has long held that good data is the foundation of a healthy industry. The Global OOH Expenditure Survey has demonstrated that year after year for total out-of-home spend. This study applies the same principle to programmatic DOOH — a segment that has reached a scale and strategic importance that demands measurement of equivalent rigour.

At the heart of this report is a collective act of industry collaboration. Twelve supply-side platforms agreed to submit confidential revenue data to an independent aggregator — PricewaterhouseCoopers — so that an independently aggregated, whole-market picture could be produced without exposing any individual operator's commercial position. That mechanism, and the trust it requires, is what distinguishes this dataset from anything that has existed before.

This is the first of two reports publishing in close succession. Report 1 — which you are reading — covers the geographic distribution of global pDOOH spend and the way that it is traded; Report 2, to follow, will examine advertiser verticals, OOH environments and seasonality. Together these provide the most complete and authoritative picture of global programmatic DOOH trading ever assembled.

WOO is grateful to every SSP that participated in this inaugural study, to PricewaterhouseCoopers for their professionalism and independence, and to the broader WOO membership whose engagement makes initiatives of this kind possible. The measurement programme continues from here.

METHODOLOGY & SCOPE

How the WOO Global pDOOH Expenditure Study was conducted

Study Overview

The WOO Global pDOOH Expenditure Study 2026 is the first independently aggregated, supply-side dataset measuring programmatic Digital Out-of-Home (pDOOH) advertising revenue at a global, regional and country level. The study covers the full calendar year 2025 and is based on net revenue data submitted by twelve participating supply-side platforms (SSPs) directly to PricewaterhouseCoopers LLP (PwC) as independent aggregator.

Data Collection

1

SSP Data Submission

Participating SSPs submitted net revenue data directly and confidentially to PwC. Data was captured at country level by delivery format, channel type (OOH-specialist DSP vs omni-channel DSP), buy type (PMP, Open Auction, Programmatic Guaranteed) and advertiser vertical. No individual operator figures were shared with WOO or any other participant at any stage.

2

Independent Aggregation

PwC aggregated submissions to market level — no individual operator figures were disclosed at any point. PwC applied sense-checks to assess consistency, completeness and reasonableness of submissions, and applied agreed parameters to ensure no individual participant was identifiable from published outputs. PwC produced hard-coded output tables for WOO publication (v.07/08/26).

3

Publication

WOO publishes aggregated, anonymised results as an externally branded pDOOH Adspend Report. All figures are clearly caveated as indicative market estimates — not audited. Country-level data is subject to a minimum of three SSP submission threshold. The published report may refer to PwC's involvement only where the scope of that involvement is made clear.

Definitions

pDOOH	Programmatic Digital Out-of-Home advertising — DOOH inventory transacted via automated buying platforms rather than through traditional direct insertion orders.
SSP	Supply-Side Platform — technology infrastructure operated by publishers or third-party vendors enabling automated selling of DOOH inventory.
OOH-Specialist DSP	A demand-side platform designed primarily or exclusively for out-of-home media buying (e.g. Broadsign, DAX, Vistar Media, VIOOH, Hivestack by Perion).
Omni-Channel DSP	A demand-side platform supporting multiple media channels that has extended capability to include DOOH alongside other media channels.
PMP	Private Marketplace — invited, non-guaranteed auctions between selected buyers and sellers operating within defined parameters.
Open Auction (RTB)	Real-time bidding open to all qualified buyers via a public auction mechanism.
Programmatic Guaranteed (PG)	A transaction model in which price and inventory volume are pre-agreed between buyer and seller, but the deal is executed via programmatic infrastructure.
Penetration Rate	pDOOH spend as a percentage of total DOOH advertising spend in a given market, expressed as a percentage.

Scope & Caveats

This study covers pDOOH revenue transacted via SSP platforms for the full calendar year 2025. It does not capture: direct programmatic guaranteed deals executed outside SSP platforms; revenue from direct insertion orders not routed through participating SSPs; or markets where no SSP participant has active operations. Figures represent net SSP revenue and have been scaled where market coverage is assessed as incomplete. All amounts are expressed in United States dollars (USD) at 2025 average exchange rates.

PwC's role was limited to aggregating and sense-checking data submitted by participants. PwC did not audit, verify, review or assure the accuracy of individual SSP submissions, and has not expressed any opinion on the reliability or completeness of the data received.

SSP PARTICIPANTS & ACKNOWLEDGEMENTS

12 supply-side platforms contributing to the inaugural study

The WOO Global pDOOH Expenditure Study would not be possible without the participation of the following twelve supply-side platforms, each of which submitted confidential revenue data to PricewaterhouseCoopers LLP for independent aggregation. WOO thanks each organisation for their trust in this process and their commitment to the greater transparency of the programmatic DOOH market.

Key Insight: SSP participant names above are listed for identification purposes. No individual SSP revenue or market share figures are disclosed in this report. All published data is aggregated across a minimum of three participants per market segment.

Independent Aggregation — PricewaterhouseCoopers LLP

PwC was engaged by WOO under an engagement letter dated 20 May 2026 to act as independent aggregator for this study. PwC received all SSP data submissions directly and confidentially, aggregated submissions to market level, applied sense-checks for consistency and completeness, and produced the hard-coded output tables on which this report is based (version: v.07/08/26). PwC's involvement in this study does not constitute an audit, review or assurance engagement. Readers should not place undue reliance on the figures as definitive market measurements.

EXECUTIVE SUMMARY

Key findings from Report 1: Geography & Country Rankings

$1.339bn	7.0%	12	13	12
Global pDOOH Adspend 2025 (USD)	of Total Global DOOH Spend	SSP Participants	Individual Country Datasets	UN Sub-Regions Covered

1

The USA leads globally by volume — but Germany leads by penetration

The United States accounts for $545.5m of global pDOOH spend — the largest single market by a wide margin. But Germany, at 31.8% programmatic penetration of total DOOH, has the highest pDOOH penetration rate of any major market. Belgium (25.5%) and France (16.7%) also punch well above their market size.

2

Americas dominates — APAC holds the greatest growth opportunity

The Americas region accounts for $667m (49.8% of global spend) at 14.1% penetration — driven primarily by the USA and Canada. EMEA contributes $521m at 9.4% penetration. APAC, at $151m and just 1.7% penetration, sits on an enormous DOOH base — particularly in Eastern Asia, where a $7.3 billion DOOH market operates at just 0.6% programmatic take-up.

3

PMP is the structural default — everywhere

Private Marketplace transactions account for 75.7% ($1.014bn) of all global pDOOH spend. This is consistent across regions: EMEA shows the highest PMP concentration at 86.7%. Open Auction (RTB) accounts for 17.4% and Programmatic Guaranteed 6.9%.

4

OOH-specialist DSPs dominate globally; omni-channel platforms account for 34.5%

OOH-specialist platforms (Broadsign, DAX, Vistar Media, VIOOH, Hivestack by Perion and others) account for 65.5% ($877m) of all pDOOH spend globally. Omni-channel DSPs — platforms that transact across multiple media types — account for 34.5% ($462m), with higher shares in markets where specialist infrastructure is less established.

5

Trading structure is uniform — revealing in the exceptions

PMP is the global default in every region, accounting for 75.7% ($1,014m) of all pDOOH spend. OOH-specialist DSPs lead at 65.5% globally, with the highest-penetration markets (Australia, UK) trading predominantly via specialist platforms. Less-developed markets rely more on omni-channel DSPs.

GLOBAL PDOOH OVERVIEW

Full Year 2025 — Independently Aggregated by PwC

Global pDOOH adspend reached **$1.339 billion** in full-year 2025 — the first independently aggregated global figure for programmatic Digital Out-of-Home advertising. Across twelve participating supply-side platforms and more than forty markets, this represents **7.0% of total global DOOH spend** traded programmatically.

AMERICAS	EMEA	APAC
$667m	$521m	$151m
14.1%	9.4%	1.7%
Highest penetration — USA & Canada driven	Germany & Western Europe lead	ANZ leads; largest growth opportunity

How pDOOH is Transacted — Global Buy Type Split

Private Marketplace (PMP)	75.7%	$1,014m	The dominant transaction model in every region globally. Invited auctions between selected buyers and sellers.
Open Auction (RTB)	17.4%	$232m	Growing as omni-channel DSPs access OOH via open exchange. Highest in the Americas (26.9%) and SE Asia.
Programmatic Guaranteed (PG)	6.9%	$93m	Pre-agreed price and reserved inventory. EMEA leads at 11.2%; Germany and Brazil are the primary PG markets.

OOH-Specialist vs Omni-Channel DSPs

OOH-Specialist DSPs	65.5%	$877m	e.g. Broadsign, DAX, Vistar Media, VIOOH, Hivestack by Perion. Dominant in higher-penetration markets: Australia (75.8%), UK, Netherlands.
Omni-Channel DSPs	34.5%	$462m	e.g. platforms with cross-channel buying capability. Higher share in less-developed pDOOH markets(South America, SE Asia, North Asia).

Key Insight: The USA and Germany together account for $761.8m — 56.9% of all global pDOOH spend. Yet Germany's 31.8% penetration rate dwarfs the USA's 15.9%, revealing that absolute scale and pDOOH penetration rate tell very different stories.

UN SUB-REGIONAL ANALYSIS

pDOOH spend and penetration across 12 UN sub-regions — Full Year 2025

The following tables present pDOOH expenditure and penetration data organised by UN geographic sub-region — enabling consistent cross-border comparison across the Americas, EMEA and Asia-Pacific.

Americas — $667m | 14.1% Regional Penetration

Sub-Region	pDOOH Spend	Penetration	Key Context
Northern America	$618.5m	15.8%	USA + Canada. Largest sub-region globally by pDOOH volume.
Central America	$16.9m	7.6%	Mexico the dominant market. Growing pDOOH ecosystem across the sub-region.
South America	$31.6m	5.4%	Brazil ($25.9m) the primary market. Mexico classified under Central America.

EMEA — $521m | 9.4% Regional Penetration

Sub-Region	pDOOH Spend	Penetration	Key Context
Western Europe	$346.7m	21.3%	Germany + France + Belgium + Netherlands. Highest penetration sub-region globally.
Northern Europe	$112.9m	7.1%	UK ($90.4m) dominant. Nordics ($21.1m) maturing rapidly.
Southern Europe	$33.3m	5.6%	Spain ($21.2m) leads. Italy and Portugal early-stage.
Eastern Europe	$20m	4.6%	Emerging markets. Poland and Czech Republic primary contributors.
Southern Africa	$4.6m	8.5%	South Africa (8.6% penetration) — most advanced pDOOH market in Africa.

Asia-Pacific — $151m | 1.7% Regional Penetration

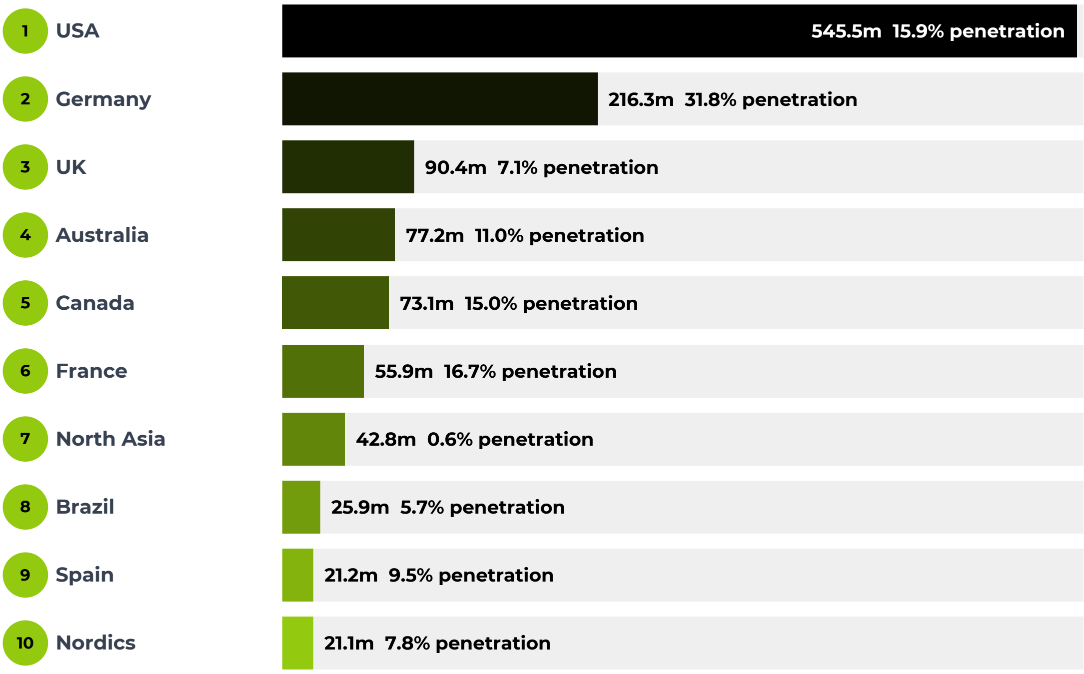
Sub-Region	pDOOH Spend	Penetration	Key Context
Australia & New Zealand	$92.3m	11.4%	ANZ accounts for 61% of all APAC pDOOH. NZ at 14.2% is 6th highest penetration globally.
Eastern Asia	$42.8m	0.6%	Japan, South Korea, China. $7.3bn DOOH base — the world's largest single untapped opportunity.
South-East Asia	$16m	2.3%	Singapore, Thailand, Philippines and others. Growing omni-channel DSP activity.

Key Insight: Western Europe ($346.7m at 21.3% penetration) is the highest-penetration sub-region globally. Eastern Asia holds a $7.3 billion DOOH base at just 0.6% pDOOH penetration — the single largest structural growth opportunity in global programmatic OOH.

TOP 10 MARKETS — PDOOH SPEND (USD)

Ranked by absolute pDOOH revenue · Full Year 2025

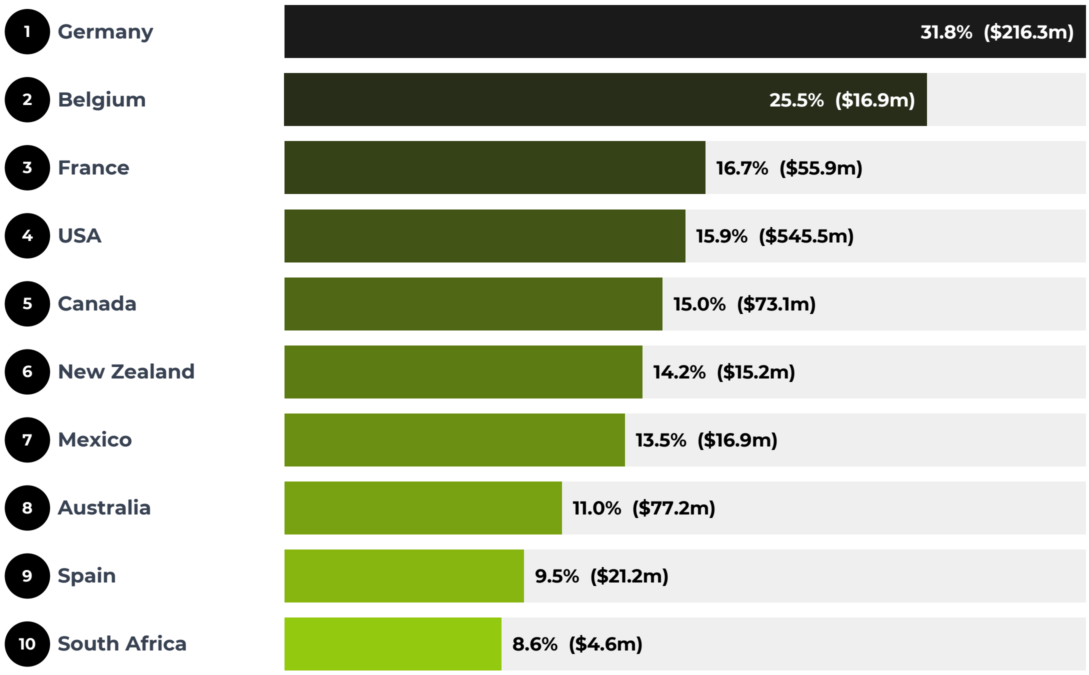
The following rankings present the ten largest individual pDOOH markets globally by absolute spend in USD. Country-level data is subject to a minimum of three SSP submission threshold; where this is not met, data is included in regional totals but not published at individual country grain. 'North Asia' represents Japan, South Korea and Mainland China as a grouped sub-region.



TOP 10 MARKETS — PDOOH PENETRATION RATE (%)

Ranked by pDOOH share of total DOOH spend · Full Year 2025

Penetration rate — pDOOH spend as a percentage of total DOOH spend — provides a complementary view to absolute volume, revealing which markets have structurally adopted programmatic trading irrespective of overall size.



Key Insight: Germany's 31.8% penetration rate is the highest of any major global market — nearly double the USA's 15.9% and more than four times the global average of 7.0%. New Zealand (14.2%), ranked 6th globally on penetration, punches far above its market weight, driven by a well-developed OOH-specialist DSP ecosystem.

COUNTRY PROFILES

Individual market data — spend, penetration, DSP type, buy type

United States

$545.5m pDOOH spend

15.9% penetration

DOOH Base	$3.4bn
Region	Northern America
OOH-Specialist DSP	63.3%
Omni-Channel DSP	36.7%
PMP Share	68.3%
Open Auction (RTB)	29.8%
Prog. Guaranteed	2.0%
Rank by Volume	#1
Rank by Penetration	#4

Key Insight

Largest pDOOH market globally by volume. High RTB share (29.8%) driven by omni-channel DSP activity. Open Auction well above global average, reflecting the depth of mainstream programmatic demand from agencies using omni-channel platforms.

Germany

$216.3m pDOOH spend

31.8% penetration

DOOH Base	~$680m
Region	Western Europe
OOH-Specialist DSP	47.1%
Omni-Channel DSP	52.9%
PMP Share	48.2%
Open Auction (RTB)	0.4%
Prog. Guaranteed	51.4%
Rank by Volume	#2
Rank by Penetration	#1

Key Insight

The highest-penetration major pDOOH market globally at 31.8%. Germany's data reveals a striking structural characteristic: Programmatic Guaranteed accounts for 51.4% of transactions — the highest PG share of any covered market, reflecting a preference for pre-negotiated, structured programmatic deals. Germany also shows the highest omni-channel DSP share (52.9%) among major markets, which may reflect broad mainstream agency engagement with DOOH.

United Kingdom

$90.4m pDOOH spend

7.1% penetration

DOOH Base	~$1.27bn
Region	Northern Europe
OOH-Specialist DSP	71.1%
Omni-Channel DSP	28.9%
PMP Share	94.6%
Open Auction (RTB)	3.8%
Prog. Guaranteed	1.6%
Rank by Volume	#3
Rank by Penetration	>10

Key Insight

The UK is one of the most OOH-specialist-led markets globally (71.1% OOH DSP), reflecting deep integration of OOH-specialist SSPs into traditional OOH operator trading workflows. PMP dominates at 94.6% — the highest PMP share of any covered major market. Despite its scale ($90.4m), the UK's penetration rate (7.1%) remains below that of France, Canada or Belgium.

Australia

$77.2m pDOOH spend

11.0% penetration

DOOH Base	$700m
Region	Australia & New Zealand
OOH-Specialist DSP	75.8%
Omni-Channel DSP	24.2%
PMP Share	83.8%
Open Auction (RTB)	15.7%
Prog. Guaranteed	0.4%
Rank by Volume	#4
Rank by Penetration	#8

Key Insight

Australia is one of the most OOH-specialist-led programmatic markets in the world (75.8% OOH-specialist DSP), reflecting the deep integration of OOH-specialist SSPs into the domestic trading ecosystem. PMP dominance at 83.8% is among the highest globally. PG is near-zero (0.4%), unlike most APAC peers.

Canada

$73.1m pDOOH spend

15.0% penetration

DOOH Base	~$487m
Region	Northern America
OOH-Specialist DSP	90.2%
Omni-Channel DSP	9.8%
PMP Share	78.1%
Open Auction (RTB)	21.6%
Prog. Guaranteed	0.3%
Rank by Volume	#5
Rank by Penetration	#5

Key Insight

Canada's 15.0% penetration rate — in line with the USA — reflects a well-developed pDOOH ecosystem with a strong OOH operator base and established programmatic trading relationships. OOH-specialist DSPs dominant (90.2%) with RTB accounting for a meaningful 21.6% of buy-type activity.

France

$55.9m pDOOH spend

16.7% penetration

DOOH Base	~$335m
Region	Western Europe
OOH-Specialist DSP	63.3%
Omni-Channel DSP	36.7%
PMP Share	96.2%
Open Auction (RTB)	1.3%
Prog. Guaranteed	2.5%
Rank by Volume	#6
Rank by Penetration	#3

Key Insight

France's 16.7% penetration rate — third highest globally — outperforms its absolute market size, positioning it alongside the USA and Canada as a leading programmatic OOH market. PMP dominates at 96.2%, the highest PMP share of any covered market, reflecting a highly structured trading environment.

Belgium

$16.9m pDOOH spend

25.5% penetration

DOOH Base	$66.3m
Region	Western Europe
OOH-Specialist DSP	67.7%
Omni-Channel DSP	32.3%
PMP Share	—
Open Auction (RTB)	—
Prog. Guaranteed	—
Rank by Volume	#10
Rank by Penetration	#2

Key Insight

Belgium's 25.5% pDOOH penetration rate — second only to Germany globally — is a remarkable finding for a relatively small market. Belgium's high penetration reflects advanced adoption of programmatic trading tools by its principal OOH operators and strong agency demand.

New Zealand

$15.2m pDOOH spend

14.2% penetration

DOOH Base	$107m
Region	Australia & New Zealand
OOH-Specialist DSP	86.4%
Omni-Channel DSP	13.6%
PMP Share	81.4%
Open Auction (RTB)	18.6%
Prog. Guaranteed	0.02%
Rank by Volume	>10
Rank by Penetration	#6

Key Insight

New Zealand's 14.2% penetration — 6th highest globally — is exceptional relative to its market size. A well-developed OOH-specialist DSP ecosystem and strong agency programmatic adoption have driven penetration well above the global average of 7.0%. ANZ combined ($92.3m) accounts for 61% of all APAC pDOOH spend.

Brazil

$25.9m	5.7%
pDOOH spend	penetration

DOOH Base	~$454m
Region	South America
OOH-Specialist DSP	33.7%
Omni-Channel DSP	66.3%
PMP Share	64.4%
Open Auction (RTB)	0.3%
Prog. Guaranteed	35.3%
Rank by Volume	#8
Rank by Penetration	>10

Key Insight

Brazil is the primary pDOOH market in Latin America, accounting for the majority of South America's $31.6m total. High omni-channel DSP share (66.3%) and a significant PG share (35.3%) may reflect a market building its OOH-specialist programmatic infrastructure while relying on structured deals.

Mexico

$16.9m	13.5%
pDOOH spend	penetration

DOOH Base	$125m
Region	Central America
OOH-Specialist DSP	64.7%
Omni-Channel DSP	35.3%
PMP Share	—
Open Auction (RTB)	—
Prog. Guaranteed	—
Rank by Volume	#9
Rank by Penetration	#7

Key Insight

Mexico's 13.5% penetration rate ranks 7th globally — a standout result for Latin America and evidence of strong programmatic adoption by Mexican OOH operators. Classified under UN Central America sub-region.

South Africa

$4.6m
pDOOH spend

8.6%
penetration

DOOH Base	$53.3m
Region	Southern Africa
OOH-Specialist DSP	37.2%
Omni-Channel DSP	62.8%
PMP Share	—
Open Auction (RTB)	—
Prog. Guaranteed	—
Rank by Volume	>10
Rank by Penetration	#10

Key Insight

South Africa is the most advanced pDOOH market on the African continent, contributing the majority of Southern Africa's $4.6m total. High omni-channel DSP share (62.8%) may indicate that OOH-specialist programmatic tooling is at an earlier stage of development in this market.

LATAM & AFRICA DEEP-DIVE

Brazil, Mexico and Southern vs Northern Africa — 2025

LATAM — Brazil & Mexico

Latin America contributed $48.5m to global pDOOH spend in 2025, across two principal markets. Brazil, classified within South America, is the primary revenue market. Mexico, classified under Central America, stands out for its penetration rate (13.5%) — 7th highest globally.

Country	Spend	Penetration	UN Region	Context
Brazil	**$25.9m**	**5.7%**	South America	Largest pDOOH market in LATAM. High omni-channel DSP share (66.3%) and PG activity (35.3%) may reflect a market building its specialist infrastructure.
Mexico	**$16.9m**	**13.5%**	Central America	7th highest penetration globally. Strong adoption by domestic OOH operators. Classified under UN Central America sub-region.

Africa — South Africa vs Rest of Continent

Africa contributes $4.65m to global pDOOH spend in 2025. South Africa is the dominant market, accounting for the overwhelming majority of continental pDOOH activity. The comparison below illustrates the concentration of programmatic OOH trading within a single market.

Market	Spend	Penetration	Key Notes
South Africa	**$4.6m**	**8.6%**	The most established pDOOH market on the African continent. Above the global average penetration rate of 7.0%. High omni-channel DSP share (62.8%) — specialist platforms at an earlier stage of development.
Rest of Africa	**$0.05m**	**<0.1%**	Very nascent pDOOH activity across all other African markets. Significant DOOH infrastructure exists (particularly Northern and West Africa) but programmatic trading is not yet materially established.

Key Insight: South Africa accounts for effectively all of Africa's pDOOH spend at $4.6m and 8.6% penetration — above the global average of 7.0%. The remaining African markets collectively represent less than $0.1m, highlighting the concentration of programmatic OOH capability within a single market on the continent.

DSP TYPE & BUY TYPE ANALYSIS

How pDOOH inventory is accessed and transacted globally — 2025

OOH-Specialist vs Omni-Channel DSPs — Regional View

The split between OOH-specialist and omni-channel DSPs is one of the most revealing structural indicators in the pDOOH market. Markets with higher pDOOH penetration tend to show stronger OOH-specialist DSP presence, though this is a correlation rather than a direct causal relationship. Markets at earlier stages of programmatic adoption tend to show higher omni-channel shares as mainstream programmatic buyers access OOH for the first time.

Market	OOH-Specialist DSP	Omni-Channel DSP	Context
Global	**65.5%**	**34.5%**	OOH-specialist DSPs dominate at almost 2:1. Omni-channel growing as mainstream media buying platforms expand DOOH capability.
Americas	**62%**	**38%**	USA shows 63.3% OOH-specialist. South America and Central America may show higher omni-channel share, which may reflect less-developed specialist infrastructure.
EMEA	**63%**	**37%**	Western Europe OOH-specialist-led. Germany shows highest omni-channel share of any major market (52.9%), reflecting broad mainstream agency engagement with pDOOH via trade desks.
APAC	**65%**	**35%**	Australia (75.8% OOH-specialist) leads regionally. Eastern Asia and SE Asia show higher omni-channel share as programmatic DOOH is early-stage.
Aus & New Zealand	**75.8%**	**24.2%**	One of the most OOH-specialist-led sub-regions globally — reflecting deep integration of OOH-specialist SSPs into the ANZ trading ecosystem.
South Africa	**37%**	**63%**	Highest omni-channel share of any covered African market — may reflect OOH-specialist tooling at an earlier stage of development in this market.

Buy Type by Region — PMP, Open Auction & Programmatic Guaranteed

Region	PMP	RTB / Open Auction	Prog. Guaranteed	Notes
Global	**$1,014m (75.7%)**	$232m (17.4%)	$93m (6.9%)	PMP the structural default in every region.
Americas	**$467m (69.4%)**	$179m (26.9%)	$21m (3.1%)	Highest RTB share globally — driven by omni-channel DSPs in North and South America.
EMEA	**$452m (86.7%)**	$11m (2.1%)	$58m (11.2%)	Highest PMP concentration and PG share. Germany and EMEA operators prefer PG for premium deals.

APAC	**$114m (75.1%)**	$17m (11.2%)	$21m (13.7%)	APAC shows highest PG % regionally — driven by Japan, Korea structured deals. Australia near-zero PG (0.4%).
Australia	**$64.7m (83.8%)**	$12.1m (15.7%)	$0.3m (0.4%)	PMP dominant at 83.8%. Near-zero PG — direct programmatic deals not yet established in ANZ.

Note: Venue environment breakdown (Outdoor, Retail, Transit, Entertainment) and advertiser vertical analysis are covered in full in Report 2 — Verticals, DSP & Transaction Analysis.

KEY THEMES & CONCLUSIONS

Report 1: Geography & Country Rankings — WOO Global pDOOH Expenditure Study 2026

Penetration, not spend, is the defining story

Absolute programmatic spend concentrates in the USA ($545.5m) and Germany ($216.3m) — but the more revealing measure is how much of each market's DOOH is traded programmatically. Belgium (25.5%) and France (16.7%) punch far above their size; the UK ($90.4m, 7.1%) and North Asia ($42.8m, 0.6%) are underpenetrated relative to their DOOH scale. Penetration is where the real structural story of pDOOH development lives.

The trading rails are consistent — revealing in the exceptions

PMP is the global default in every region, accounting for 75.7% of all pDOOH spend. Markets with higher pDOOH penetration tend to show stronger OOH-specialist DSP presence — Australia (75.8%), UK (71.1%) — though this is a correlation rather than a direct causal relationship. Germany stands out: the highest-penetration major market, yet with a 51.4% PG share and 52.9% omni-channel DSP share, reflecting a different structural path to programmatic scale.

APAC and LATAM are the clearest structural growth opportunities

APAC holds a $9bn+ DOOH base at 1.7% pDOOH penetration — with Eastern Asia alone representing $7.3bn of DOOH at 0.6% programmatic take-up. If Eastern Asia's penetration reached Australia's current level (11%), total Eastern Asia pDOOH spend would reach approximately $803m — an incremental gain of around $760m above current levels. LATAM — led by Mexico (13.5% penetration) and Brazil (5.7%) — is the second major expansion frontier.

Context from multi-year trends — WOO Global OOH Expenditure Survey

This study covers a single calendar year (2025) and does not on its own establish directional trends. For the broader picture of how total OOH spend has evolved over time — and the context within which pDOOH is growing — readers are directed to the WOO Global OOH Expenditure Survey, published annually, which provides multi-year benchmarks across all OOH channels and geographies. The pDOOH data in this study complements rather than replaces that broader market view.

Looking Ahead — Report 2

Report 2 of the WOO Global pDOOH Expenditure Study 2026 will be published in September 2026. It examines the structural composition of pDOOH spend: advertiser verticals by market, OOH venue environments, and seasonality — providing the transactional context that this geographic report establishes the foundation for. Together, both reports constitute the most comprehensive granular analysis of the global pDOOH market ever published.

About WOO — World Out of Home Organization

The World Out of Home Organization is the global trade body for the out-of-home advertising industry, representing operators, suppliers and agencies across more than 70 member countries. WOO leads the industry in measurement, data standards and advocacy — publishing the annual Global OOH Expenditure Survey, the Audience Measurement Guidelines and, from 2026, the Global pDOOH Expenditure Study. worldooh.org

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All figures presented in this report are indicative market estimates prepared from aggregated SSP data submissions. They are not audited financial statements and should not be relied upon as such. Individual SSP revenue figures and market shares are not disclosed in any form. Country-level data is subject to a minimum of three SSP submission threshold per market segment; where this threshold is not met, the market's data is included in regional and global aggregates but is not published at individual country grain.

All amounts are expressed in United States dollars (USD) at 2025 average exchange rates.

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Data source: PwC / WOO Global pDOOH Expenditure Study 2026 (v.07/08/26)

Published by the World Out of Home Organization · worldooh.org · September 2026