azerion

THE STATE OF UK DOOH

MOMENTUM, MEASUREMENT AND THE ROAD TO MATURITY

EXECUTIVE SUMMARY

UK DOOH is in confident, accelerating growth. 68% of industry professionals have increased their use of DOOH in the past 12 months, 61% expect to spend more in the next 12, and 93% consider it important to their omnichannel strategy in 2026. Programmatic DOOH has already become the dominant buying method, used by 77% of respondents, and is increasingly integrated into mainstream digital buying workflows.

The channel is trusted for brand building, creative impact and reach. But performance credentials remain underappreciated, creative is rarely refreshed, and targeting still leans heavily on location data over audience intelligence.

Measurement is the thread running through every barrier in this report. It is the top obstacle to investment, the top thing planners would change, and the area where confidence is weakest. Critically, this is as much a perception problem as a product one. The tools exist, but awareness and trust in them has not yet been established at scale.

The opportunity is clear: convert occasional planners into consistent ones, close the gap between brand and performance measurement, and build the cross-media proof points that give clients the confidence to increase budgets. The sentiment is there. The work now is turning it into action.

1. A CHANNEL IN CONFIDENT GROWTH

The headline finding of this research is unambiguous: UK DOOH is growing, and those working closest to it know it. Sentiment towards the channel is overwhelmingly positive, with 61% of industry professionals describing their outlook as positive and a further 28% going as far as very positive. That is nearly nine in ten with a favourable view.

This confidence is translating directly into action. 68% say their use of DOOH has increased compared to 12 months ago, and 61% expect their spend to increase over the next 12 months. These are not aspirational figures. They reflect decisions being made today by the people responsible for allocating budgets.

Key growth indicators from our survey:

- **93%** consider OOH important to their omnichannel strategy in 2026
- **68%** have increased their use of DOOH in the past 12 months
- **61%** expect DOOH spend to increase in the next 12 months
- **60%** describe their sentiment towards UK OOH as positive

The UK is viewed as a DOOH market in confident shape, with 60% rating it as strong or globally leading. The 37% who see it as still developing are not expressing dissatisfaction, they are identifying headroom. And the data suggests the industry knows exactly how to fill it.

2. OOH IS IN THE MIX, BUT NOT YET THE DEFAULT

Despite the strong sentiment, OOH is not yet a planning staple. The largest group of respondents, 42%, include it in only 11-30% of their media plans. Just 16% include it in the majority of campaigns. OOH is on the radar but it remains a discretionary add-on for most planners rather than a default channel.

When planners do include OOH, they tend to plan it alongside high-reach, high-attention channels. Display leads at 70%, followed by YouTube (49%), audio (46%) and TV (44%). OOH is finding its natural home within broad, brand-led, multi-channel campaigns.

The reasons for choosing OOH are equally telling. Creative impact leads at 67%, followed by high attention (61%) and broad reach (60%). Local targeting (56%) and brand building (51%) also score strongly. Performance outcomes, at just 19%, and price/value at 14%, rank well below.

OOH is trusted for what it has always done best: making brands visible and memorable at scale. The opportunity is to expand the conversation into what modern DOOH can also do, namely targeting, measurement and performance. Closing that perception gap is what will move OOH from an occasional choice to a consistent one.

3. PROGRAMMATIC DOOH: ALREADY THE DEFAULT FORMAT

One of the most striking findings in this research is how decisively programmatic DOOH has established itself as the primary format. 82% of respondents say DOOH and programmatic DOOH are among the formats they use most, far ahead of classic roadside billboards at 49% and large-format at 47%. The digital shift in OOH is not approaching. It has already happened.

77% of respondents are already buying OOH programmatically, with 44% doing so regularly. Only 19% have not yet made the shift. And ownership of programmatic DOOH buying has consolidated firmly within programmatic teams, cited by 58% of organisations, well ahead of internal OOH teams at 28%.

The benefits driving this adoption are consistent with those valued across all programmatic channels: flexibility and faster activation (58%), easier optimisation (46%) and the ability to integrate with digital planning (42%). DOOH is being valued because it fits how modern media is planned and bought, not despite it.

This has significant implications for how the channel is sold and supported. If programmatic teams are the primary buyers, the conversation needs to be conducted in their language: DSPs, audience data, targeting precision and performance accountability. OOH specialists are no longer the only audience to win over.

Looking ahead, the innovation priorities are equally clear. Programmatic buying leads at 65%, followed by attention measurement (51%), dynamic creative optimisation (47%) and real-time triggers (44%). The industry wants DOOH to behave more like digital, and those who can deliver that expectation in the next 12 months will be best placed to capture the budgets behind it.

4. THE MEASUREMENT GAP: PERCEPTION AS MUCH AS PRODUCT

Measurement is the single issue that runs through every barrier identified in this research. It is cited as the top obstacle to greater OOH investment at 58%. It is the top thing planners would change about OOH activation, selected unprompted by nearly a third of respondents. And it is the area where confidence is weakest.

Yet the picture is more nuanced than a simple capability gap. When asked about satisfaction with OOH measurement, 41% are satisfied or very satisfied, and 42% are neither satisfied nor dissatisfied. Only 18% are actively dissatisfied. The dominant feeling is not frustration but indifference, and that is a different problem requiring a different solution.

On attribution specifically, just 4% believe they can reliably attribute outcomes to OOH today. 44% describe attribution as mostly directional, and 37% find it somewhat reliable but inconsistent. Attribution is not broken. It is imprecise. And imprecision is enough to maintain belief in the channel but not enough to justify significantly larger budgets.

The measurement approaches currently in use reflect this. Footfall and visitation studies dominate at 68%, followed by post-campaign brand studies at 53%. More sophisticated approaches, including incrementality testing (23%), attention metrics (23%) and multi-touch attribution (7%), remain far less common. Adoption is concentrated in the most familiar methods, not necessarily the most effective ones.

What would increase confidence? The industry is specific. Better cross-media measurement leads at 53%, followed by more case studies with business outcomes (46%) and improved data partnerships (42%). The ask is for proof and comparability, not new technology. The tools exist. The challenge is awareness, trust and education.

This is an important distinction. Closing the measurement gap in DOOH requires both continued investment in infrastructure and a much more deliberate effort to communicate and demonstrate what is already available. The 42% who are neutral on measurement satisfaction represent an audience that could be moved with better evidence and clearer articulation of existing solutions.

5. CREATIVE AND TARGETING: WHERE PRACTICE LAGS AMBITION

Two further gaps emerge from this research that are worth addressing directly: creative refresh frequency and data sophistication in targeting.

CREATIVE

Creative impact is the number one reason planners choose OOH, cited by 67% of respondents. Yet 62% refresh their OOH creative once or never per campaign, and only 4% update dynamically. There is a clear contradiction between what the industry values about OOH and how it actually uses it.

Dynamic creative optimisation ranked third in innovation priorities, suggesting the appetite exists. But turning that interest into routine practice will require both simpler tooling and a clearer articulation of the performance benefit. The channel cannot fully realise its creative promise while most campaigns run on a single execution throughout their life.

TARGETING

Location data dominates DOOH targeting at 88%, far ahead of demographics at 51% and retail audience segments at 42%. First-party CRM data, arguably the most valuable targeting signal available to any channel, is used by just 12%.

DOOH targeting is still built primarily around where rather than who. As identity and data quality become increasingly important across all programmatic channels, the low uptake of first-party data in DOOH represents a significant untapped opportunity. Closing that gap would make the channel considerably more precise, accountable and compelling to performance-focused planners.

6. WHAT THE INDUSTRY EXPECTS NEXT

When asked to identify the biggest change coming to UK OOH over the next one to two years, the industry was clear. Programmatic and DOOH expansion leads at 40%, followed by data-driven measurement and innovative creative formats both at 26%, and enhanced targeting at 22%. AI integration, at 14%, is notable given how early its application in OOH remains.

These are not separate trends. They are interconnected. As programmatic buying matures, it enables better data, which in turn powers smarter targeting and more dynamic creative. The industry sees them as a connected wave of change, and the pace is accelerating.

The barriers to getting there faster are predominantly organisational rather than technical. Innovation adoption is being held back by cost (44%), client buy-in (44%) and measurement limitations (40%). Experimentation is being limited by budget (56%) and client appetite (53%). The capability exists. The friction is commercial and cultural.

For platforms, media owners and agencies alike, the implication is consistent: the case for DOOH needs to be made more powerfully and more evidentially at the client level. Case studies, proof points and accessible entry points are not supporting material. They are the primary sales tool.

CONCLUSION: THE DISTANCE BETWEEN INTENT AND ACTION

The UK DOOH industry is in a strong position. Sentiment is high, adoption is growing, programmatic buying is mainstream and the channel has earned its place in omnichannel planning. The direction of travel is not in question.

What this research makes clear is that the next phase of growth will not come from changing minds about DOOH. It will come from removing the friction that is preventing those already convinced from investing more consistently and more confidently.

That means better measurement communication and education. It means cross-media proof points that give clients the evidence they need. It means making programmatic DOOH more sophisticated, not just more common. And it means helping planners move from treating OOH as an occasional add-on to making it a default part of every media plan.

The sentiment is there. The tools are largely there. The work now is closing the distance between intent and action.

METHODOLOGY

This report is based on a survey of advertising industry professionals conducted by Azerion in 2026. Respondents include planners, buyers, strategists and media owners working across agency and brand environments in the UK. All figures cited refer to this survey unless otherwise stated.