

# Impact of Out of Home on society

PwC study

2026



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Outreach

Attn. Sita Bakker

Burgemeester Stramanweg 108 T

1101 AA Amsterdam

The Netherlands

**Date:** May 2026

**Subject:** OOH market study

Dear Mrs. Bakker,

We are pleased to present to you our draft report. This report has been drawn up in accordance with our engagement letter dated 09/12/2025. This report has been prepared to support Outreach in developing a survey-study looking at the out-of-home market in the Netherlands.

This report is strictly private and confidential. Save as described in the contract or as expressly agreed by us in writing, we accept no liability (including for negligence) to anyone else but you or for use of this report for any other than the stated purpose and it may not be provided to anyone else.

If you have any questions, please contact me at your convenience.

PricewaterhouseCoopers Advisory N.V.

**Jochem Moerkerken**

Partner

# Scope & process

## Disclaimer

The Scope of this survey-study is confined to quantifying aspects of societal and economic value of out of home (OOH) advertising in The Netherlands. This report does not attempt to calculate or evaluate the overall net (positive minus negative) social impact of OOH advertising. A comprehensive social cost-benefit analysis, weighing social costs against social and economic benefits, would be required for such an evaluation

### Our Scope



This report aims to support outreach in developing a survey-study looking at the out-of-home market in The Netherlands.

This report presents the outcome of the work we agreed to perform in accordance with the engagement letter dated 09/12/2025. The Scope of this survey-study is confined to quantifying aspects of societal and economic value of out-of-home (OOH) advertising in The Netherlands. This report does not attempt to calculate or evaluate the overall net (positive minus negative) social impact of OOH advertising. A comprehensive social cost-benefit analysis, weighing social costs against social and economic benefits, would be required for such an evaluation.

Our fieldwork was completed on 24-04-2026. This report does not incorporate the effects, if any of events and circumstances which may have occurred or information which may have come to light subsequent to that date.

### Access and clarity of information



Our information is based on in-depth interviews and detailed survey input from media members

### Basis of our work

Our work was carried out on the basis that the information is reliable, accurate and complete in all material respects. Unless explicitly stated in our report, we did not verify or check the information with respect to accuracy or completeness in accordance with international audit and review standards.

### Access to our report

Our report is supplied on the understanding that it is solely for the use of the client and for the purpose stated in the report . No other parties than the client are authorised to use or rely on the report. We will therefore not accept any responsibility, duty of care or liability to any unauthorised reader of our report – whether in contract, tort (including negligence) or otherwise, to any other party than the client.

As agreed in our engagement letter, our report may be shared for information purposes only

### Other

This report and any dispute which may arise out of or in connection with it, shall be governed by and construed in accordance with the laws of The Netherlands.

# To produce this report, PwC has collected survey responses from leading OOH media owners



## Introduction

- Outreach, the trade association representing the Netherlands Out-of-Home (OOH) media sector, has commissioned PwC to produce a report summarising the impact that the sector has on the economy and on society
- *Disclaimer: This report is not a full economic study, nor an official audit measuring the total 'net' benefits to the Dutch economy. Statistics may include voluntary, contractual and legally required contributions. The report includes individual opinions collected as part of the survey process. As such, this report does not purport to represent the views of all participant companies. Additionally, 'indirect' or 'induced' impacts from investments in the sector on other companies, individuals or stakeholders are excluded from the findings*



## Methodology

- A survey with targeted data requests has been distributed to Dutch OOH owners. This survey included questions on their media revenue, expenses (e.g., investments towards public infrastructure), social and environmental initiatives, and more
- Six OOH media owners, jointly representing approximately 76% of the OOH market, were willing to contribute to this report
- Additionally, five in-depth interviews were conducted with senior executives at leading OOH media owners. Not all OOH media owners were able to respond to every question in the survey, which means the results may vary by question. Where relevant, the findings have been extrapolated to reflect the perspectives of the OOH sector as a whole

**Six OOH media owners, jointly representing c.76% of the OOH market, were willing to contribute to this report**

# This report provides insights into the economic and societal impact of the sector as well as the developments going forward



## 1. NL OOH markets context

- **Understanding of the value chain:** Explanation of where OOH media owners sit in the value chain
- **Market size and development:** Market size and development in the past years<sup>1)</sup>
- **Reinvested revenues:** Calculation of the value that the sector has reinvested in society in 2025



## 3. Social impact

- **Infrastructure & contributions to public finances:** Tax, rent and revenue share contributions, as well as investments in installing and maintaining public infrastructure (e.g., bus shelters)
- **Donated media space:** donations/discounting of media space across charities, communities and governmental organisations
- **Enhanced features:** Additions to existing installations that benefit the public (e.g., defibrillators in bus shelters)
- **Donated funds:** Raising and donating funds to charities



## 2. Economic Impact

- **Employment:** People employed in the sector and salaries, bonuses and social securities paid by media owners
- **Finances:** Contribution to private sector finances (e.g., sector rent and revenue share)
- **Case studies:** Examples of how OOH media owners contribute to the development of local businesses



## 4. Environmental impact

- **Case studies:** Major initiatives with a positive, environmental impact set-up by media owners (e.g., Green Infrastructure)



## 5. OOH market outlook

- **OOH media owners expect important developments going forward** that will affect the OOH sector, and they see key opportunities and challenges that the sector will need to address in the future

 Impact chapters     Context chapters

# Key Report Insights



## Executive Summary

This independent study analyses the **role of the Dutch Out of Home media sector**, focusing on how a substantial **portion of its revenue is spent on infrastructure**, community support, and sustainability initiatives within Dutch society



## The sector's contributions to society

In 2025, around **65% of the Dutch out-of-home (OOH) sector's revenue** was reinvested into society. This was partly **allocated to public infrastructure projects**, taxes, rent and concessions to local authorities and governmental institutions, and employee wages



## Building and maintaining public infrastructure

Between 2019 and 2025, the sector **spent approximately c.€200 million on public infrastructure**, primarily building, maintaining, cleaning and upgrading a large number of public amenities such as bus shelters and information displays. Moreover, additional functionalities have been added to existing bus shelters (such as AEDs and 4G connectivity)



## Supporting communities through charitable contributions

In 2025, the sector **contributed c.€38 million<sup>1</sup> worth of media space** to charities and local governments, supporting public information and public awareness campaigns. In addition, OOH media owners collectively **raised c.€2 million in direct donations** for charitable causes



## An overview of sustainability efforts

Sustainability plays an important role in the OOH sector. **OOH media owners are working to reduce CO<sub>2</sub> emissions** (Scopes 1, 2, and 3) through investments in electric vehicles, the use of recycled and sustainable materials, transitioning to 100% green energy, and developing green infrastructure

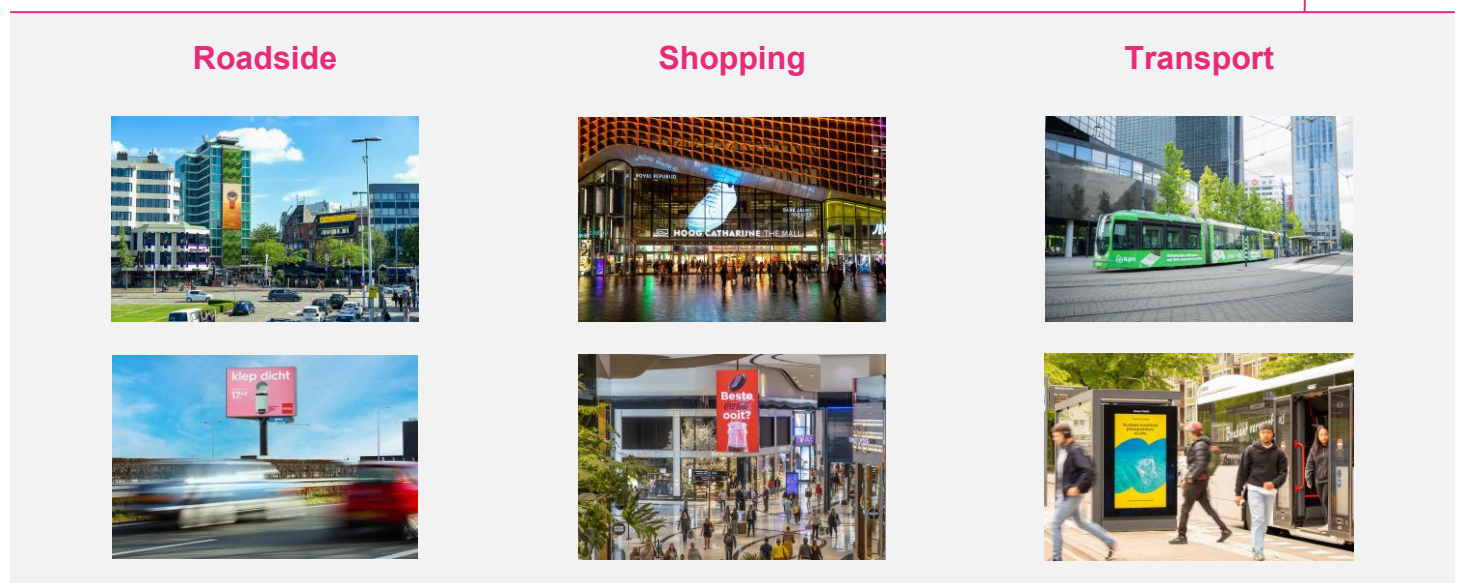
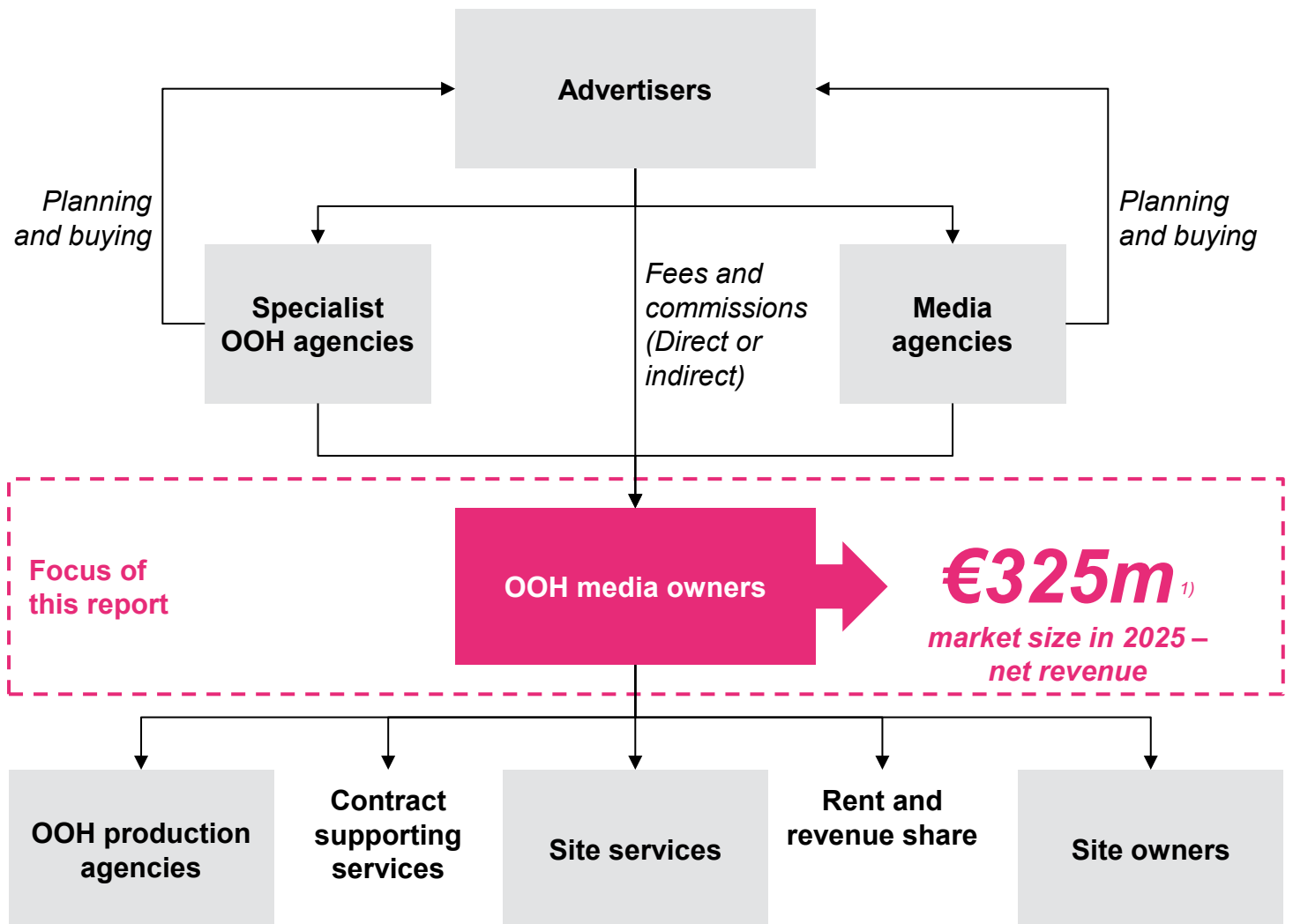


## 1. OOH market context

*“The OOH sector has exhibited resilience and substantial growth after the COVID pandemic, mainly due to the popularity and effectiveness of DOOH advertising”*

Media owner 1

# The OOH sector connects brands with the public and generated c.€325 million in net revenue in 2025

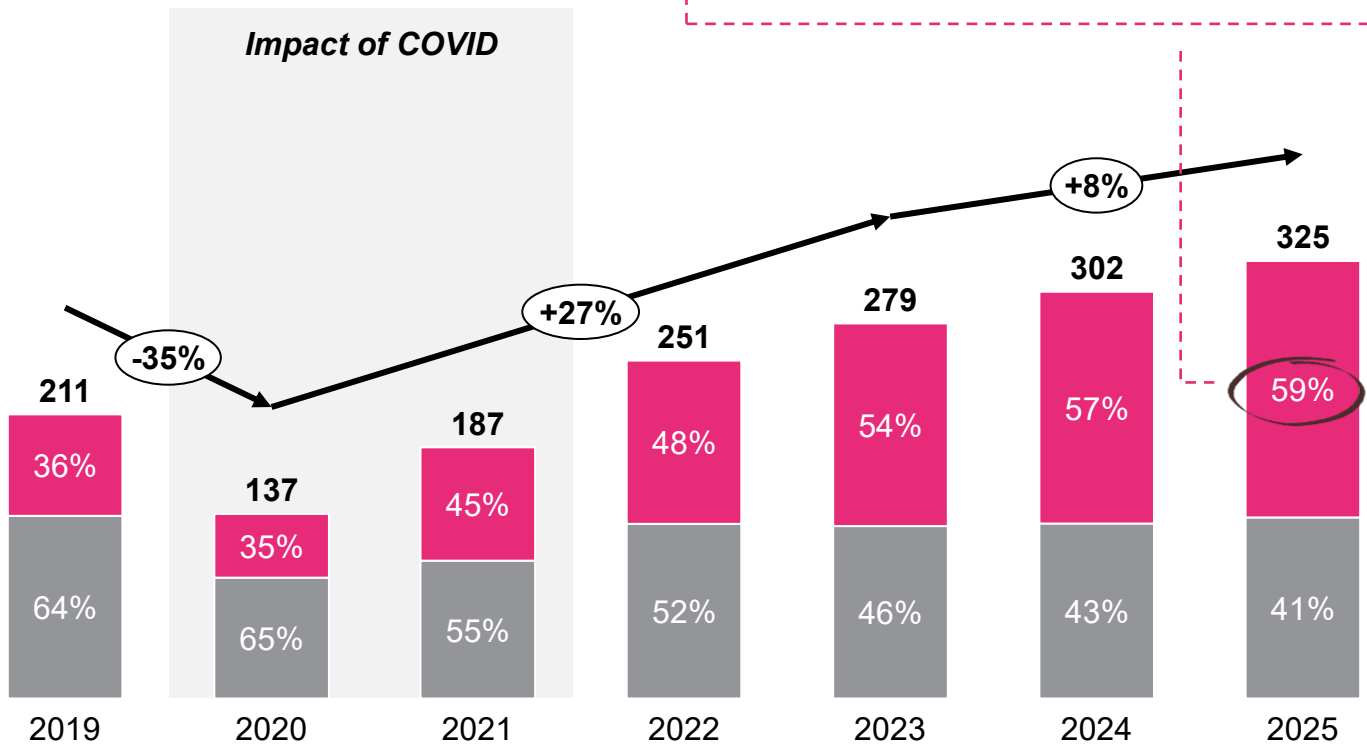


1) The entire OOH market – the 6 participating companies (combined) generate 76% of this value. Further analyses are extrapolated, so that the 6 participants reflect the rest of the market

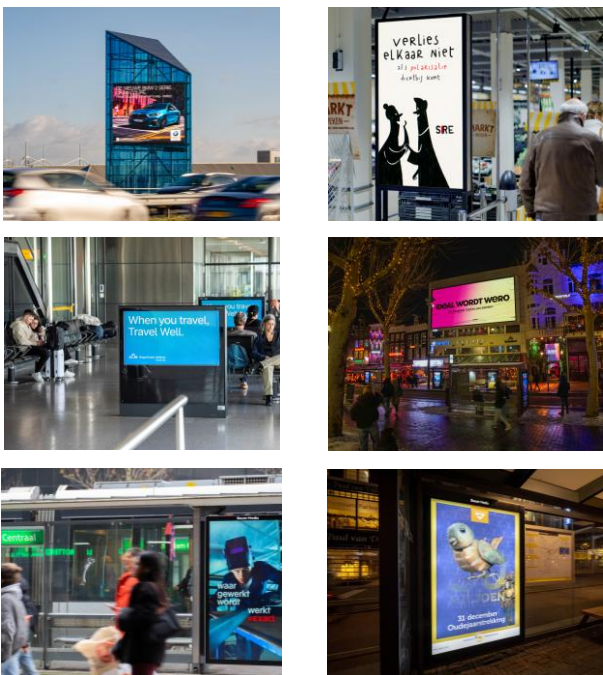
# The sector grew at 8% average annual growth, driven by digitisation

## NL OOH sector revenue €m, 2019–2025

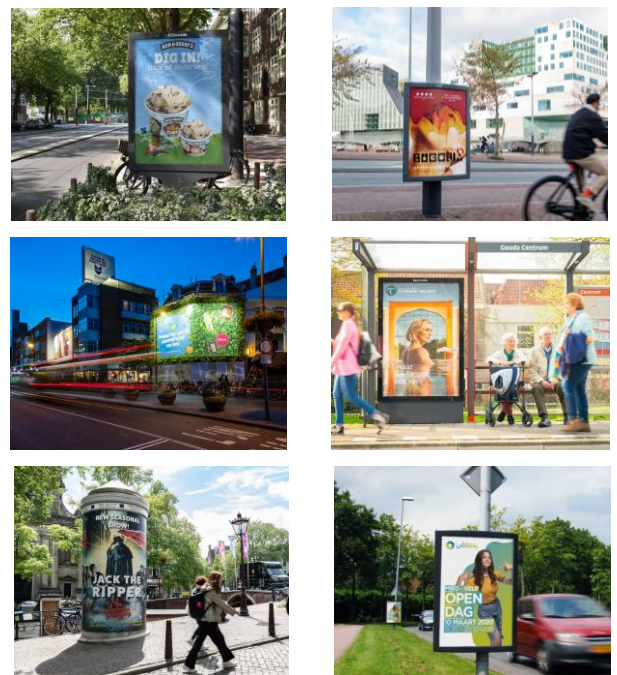
Digital displays now account for c.60% of the sector's total revenue, up from ~36% in 2019, due to accelerated digitisation and increased advertiser demand for flexibility



### Digital displays

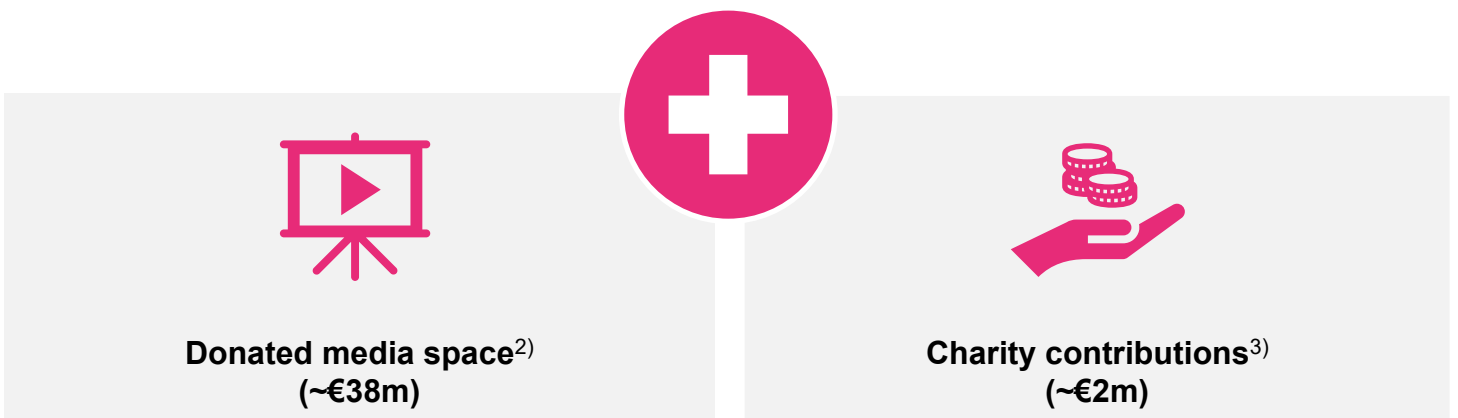
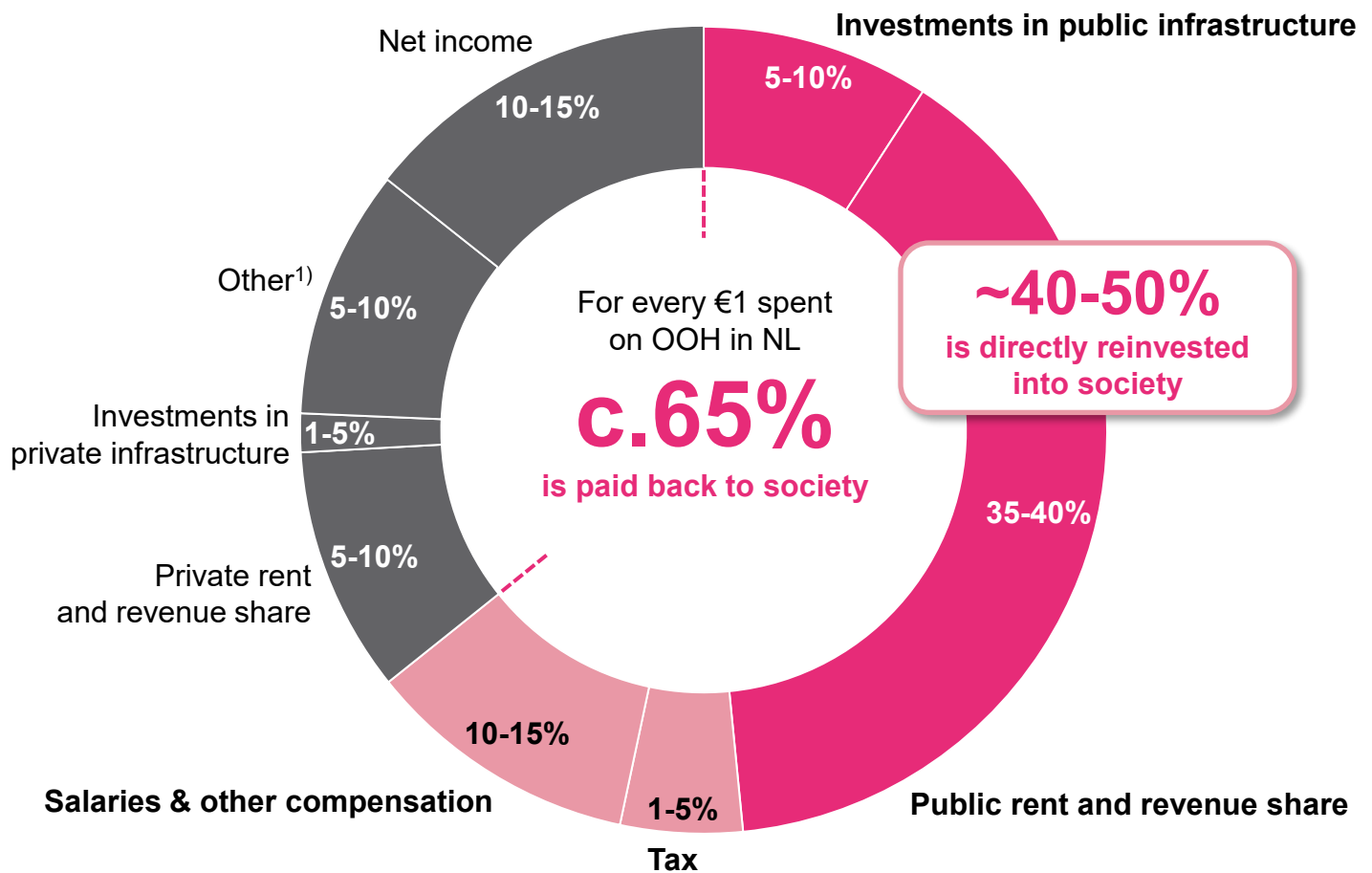


### Analogue displays



# In 2025, the sector paid back c.65% of its revenue to public institutions via infrastructure, taxes, rent (concessions and profit sharing), and wages

## Breakdown of OOH media owner revenue



■ Directly reinvested into society    
 ■ Indirectly reinvested into society    
 ■ Not an (in)direct investment into society

1) Includes other costs (such as transport, materials and energy), in line with previously developed studies; 2) The value of donated media space was self-reported by members and calculated by multiplying the total number of impressions by a CPM (Cost Per Mille) rate. This figure was not extrapolated, as significant differences between members make it difficult to estimate an accurate total value. As a result, the actual value for the sector as a whole is likely higher 3) Includes funds – not media space – raised and donated to charitable organizations



## 2. Economic impact

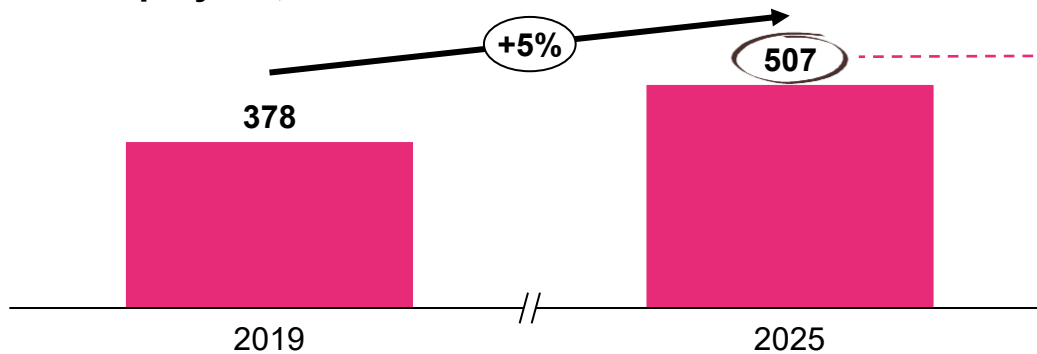
*“Our sector does not only contribute economically through the creation of jobs and payments of salaries, but also actively supports local businesses”*

Media owner 3

# The sector employs over 500 people and pays c.€36 million in salaries and benefits annually

The OOH sector employs >500 people ...

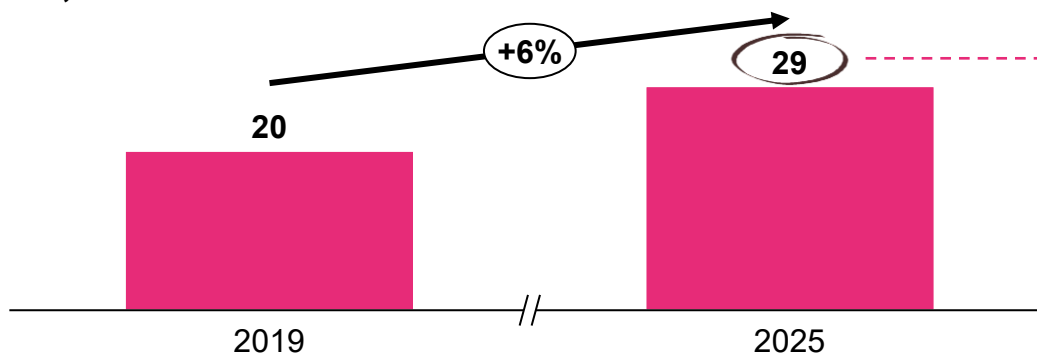
## People employed in the NL OOH sector # of employees, 2019 & 2025



This encompasses all individuals employed in the sector, ranging from office employees to infrastructure maintenance personnel

... pays out over €29m in salaries ...

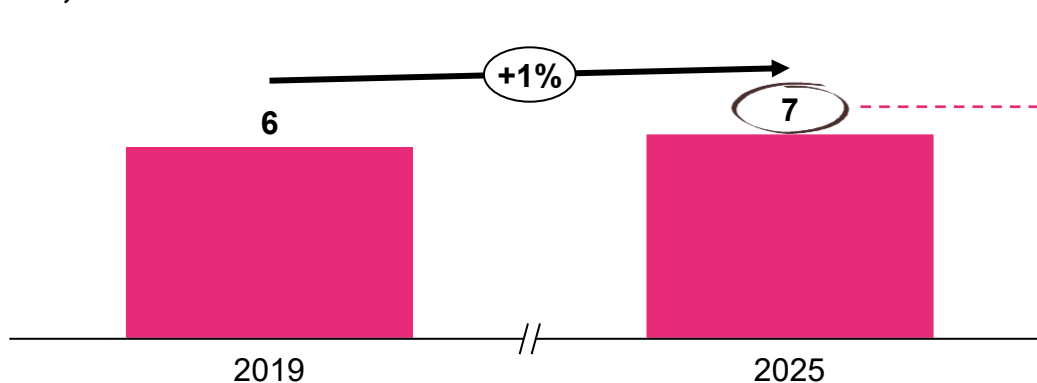
## Annual salary payout in the NL OOH sector €m, 2019 & 2025



The sector pays out c.€36m in salaries and benefits annually

... and €7m is paid out in additional benefits

## Annual pension and bonus payout in the NL OOH sector €m, 2019 & 2025

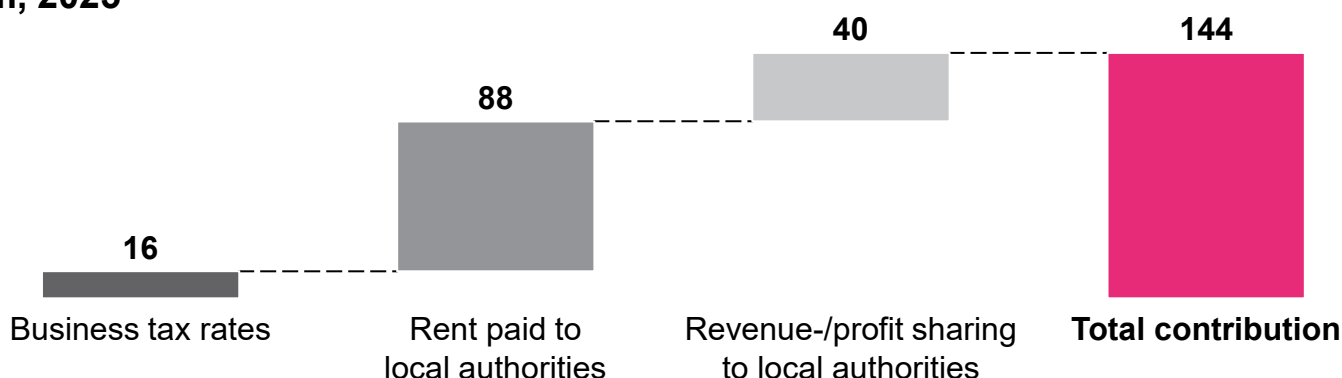


# Moreover, OOH media owners contributed c.€144m in 2025 towards local authorities and governmental institutions

These contributions are generally known as “concessions”

## OOH revenues that contribute to local authorities and institutions<sup>1)</sup> (tax + rent & revenue share to local authorities)

€m, 2025



### How are the funds used?

- The maintenance and improvement of public services and infrastructure, such as rental payments to municipalities that are used to fund public services
- These funds can be used, among other things, for public safety, infrastructure, festivals, sports clubs, and cultural initiatives

### Examples of authorities



“

*“The concession fees paid by OOH media owners to local authorities are spent directly by these authorities on facilities in the cities and social objectives. In the Municipality of Eindhoven, for example, outdoor advertising funds are explicitly earmarked for city marketing and events in the city”*

Media owner 1

“

*“In The Netherlands, far more than in other countries, media owners typically pay rent to public institutions because most OOH assets sit on municipal land”*

Media owner 3

1) For example, municipalities, provinces and transport authorities

# OOH media owners have launched initiatives supporting local businesses across a variety of projects

## Local business support<sup>1)</sup>



### Ocean Outdoor supported local businesses with a free media fund

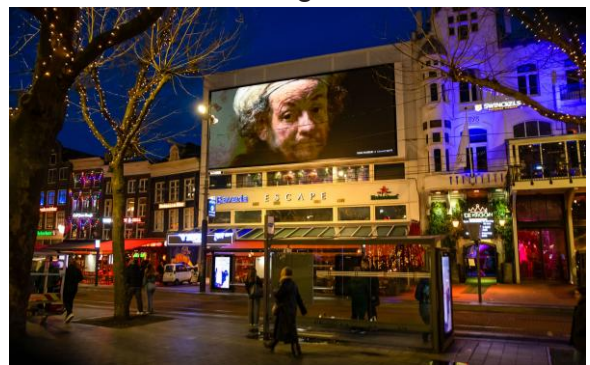
- Ocean Outdoor launched a **€10m free media support fund** to give crisis-hit SMEs nationwide **DOOH visibility during the height of COVID-19**
- Dozens of SMEs and organizations quickly benefited, using the platform to stay visible, maintain consumer connection, and **share vital public messages**
- The initiative is an example of the sector's **support for local businesses** and sector-wide solidarity



## blowUP media<sup>®</sup>

### blowUP media supports local, Dutch artists to shine in public spaces through large-scale urban exposure

- blowUP media uses its digital and large-format screens to **transform public spaces into open-air galleries**, giving artists a high-visibility platform in the heart of cities
- Artworks from both emerging and established creators are shown, including students from HKU and Rietveld as well as renowned artists
- This initiative aimed to **enrich daily urban life**, spark **emotional connection**, and foster cultural engagement beyond traditional advertising



1) The case studies mentioned in this report are illustrative and reflect broader initiatives being embraced in the market







### 3. Social impact

*“Our social impact goes far beyond advertising. We keep cities clean and connected, support cultural institutions and community services, and ensure important messages reach everyone – including people without digital access”*

Media owner 2

# The OOH sector invests in public infrastructure and contributes donated media space to local authorities and charities

## OOH sector support for public infrastructure and services

<b>A</b>	 <b>Installation and maintenance of public infrastructure</b>	<ul style="list-style-type: none"><li>• OOH media owners often <b>bear the cost of building, installing, maintaining, and cleaning public infrastructure</b> (e.g., bus shelters). This includes infrastructure both with advertising and without advertising</li><li>• As a result, local councils don't have to spend money to provide these public assets. This is <b>relieving pressure on their budgets</b> and allows funds to be spend on other public services</li></ul>
<b>B</b>	 <b>Additional functionalities</b>	<ul style="list-style-type: none"><li>• OOH media owners <b>supplement the provision of infrastructure</b> with <b>additional features/services</b> that are used by and benefit the public, such as phone charging stations, lightning, city maps, and tourist information</li><li>• More recently, public infrastructure is being equipped with a wider variety of public solutions (e.g., free-to-use defibrillators and small cells to boost 4G network performance)</li></ul>
<b>C</b>	 <b>Media space donations to local authorities and charities</b>	<ul style="list-style-type: none"><li>• OOH media owners <b>donate ad space for public and charitable campaigns</b>, helping cities, and nonprofits share messages on health, safety, and culture at no cost</li><li>• These in-kind contributions - worth millions annually - <b>support civic communication</b></li></ul>
<b>D</b>	 <b>Raising awareness and funds for charities</b>	<ul style="list-style-type: none"><li>• OOH media owners <b>engage in initiatives to raise awareness and funds for charities</b>, in addition to installing public infrastructure sites</li><li>• Examples include raising awareness and direct funds for Trees for All, Prinses Máxima Centrum, the Johan Cruyff Foundation, Fight Cancer, and Justdiggitt</li></ul>

# In 2025, c.€8m was invested into installing new public infrastructure and c.€22m on maintaining existing structures

## OOH sector investment into public infrastructure 2025

<b>CAPEX</b>	Total spend on new installations	~€8m
<b>OPEX</b>	Spend on ongoing maintenance and upgrading/maintaining existing public infrastructure	~€22m
	Public infrastructure and bus shelters	~70k units

## Examples of public infrastructure funded and maintained by the OOH sector



Bus stops



Public information signs

*“In Amsterdam alone, we maintain 1,500 bus shelters and 445 freestanding information panels, handling all cleaning and repairs at no cost to the taxpayer”*

**- Media owner**

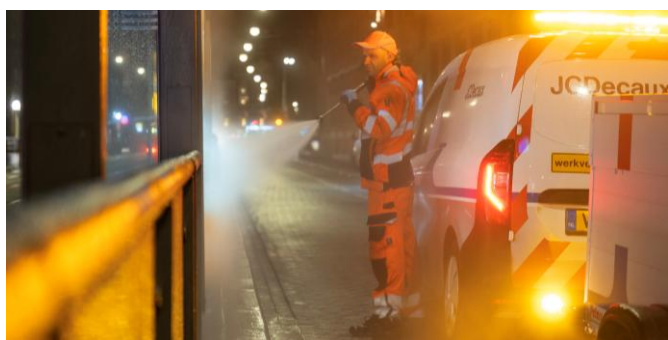
# OOH media owners are responsible for the upkeep of the public infrastructure linked to their operations



The sector invests in new infrastructure and also makes sure the public infrastructure is clean...



...the same goes for maintenance; removing weeds, graffiti, and fully replacing/refurbishing damaged shelters



*“People often don’t realise that the cleanliness and upkeep of bus shelters is done entirely by us, not the municipality. Every day our teams keep the city functional - repairing shelters, cleaning glass, ensuring accessibility, and providing urgent public communication when needed. It’s an invisible service, but essential to how the city runs”*

Media owner 1



*“The practical social impact of OOH is far greater than people think. From creating clean, safe shelters at night to supporting community campaigns within 24 hours - our infrastructure plays an active role in improving daily life in Dutch cities”*

Media owner 2

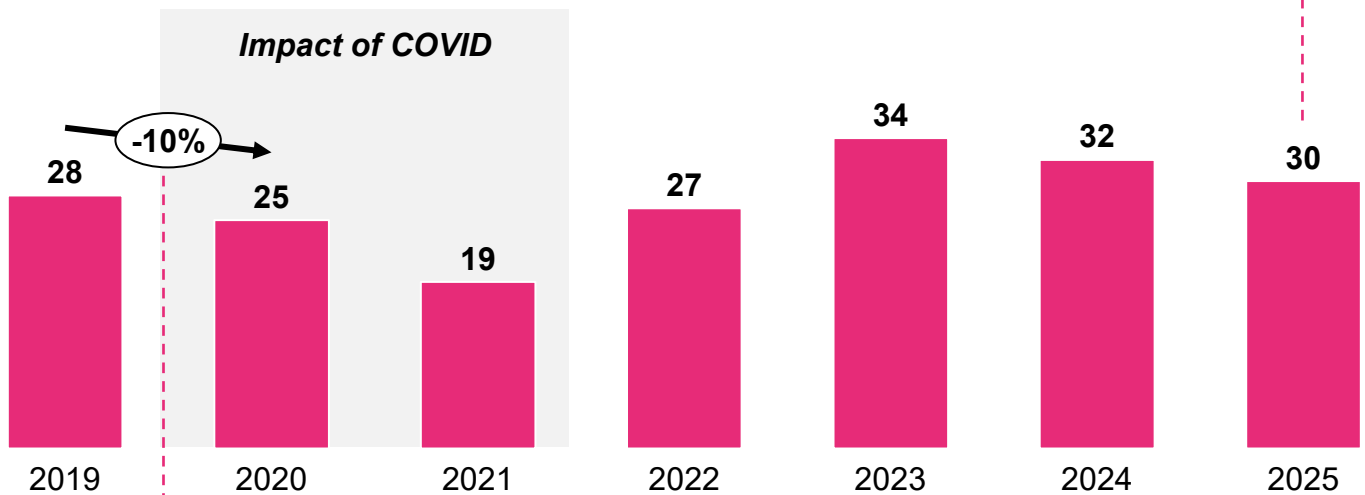
# Since 2019, the sector has spent close to €200 million in public infrastructure; expenditures stayed elevated despite the pandemic

## Investment into public infrastructure

(Includes CAPEX & OPEX)

€m, 2019–2025

The sector saw **revenue growth between 2023–2025** driven by the rapid expansion of digital advertising, while infrastructure investment declined slightly, likely because **the sector has become more sustainable**



Despite **sector revenues falling by more than 30% during this period**, OOH members **continued investing in public infrastructure**, reducing spend by only **10% in 2020** - far less than the revenue decline



*“The reduction in public-infrastructure expenditure can be attributed to the sector’s improved sustainability, particularly through greater reuse of existing materials”*

Media owner 2

# The OOH sector donates €38 million in media space through 175 societal initiatives

## Number of initiatives<sup>1)</sup> and value of donated media space # initiatives and €m, 2025

Each instance of donated media space, such as a partnership with a charity or a public-awareness campaign with a local government, counts as one initiative

**c.175 initiatives**

Initiatives



**c. €38 million**

The value of donated media space was self-reported by members and calculated by multiplying the total number of impressions by a CPM<sup>2)</sup> rate. This figure was not extrapolated, as significant differences between members make it difficult to estimate an accurate total value. As a result, the actual value for the sector as a whole is likely higher

Value



**Global Media** supports charities like Jeugdfonds, Fight Cancer, the Johan Cruyff Foundation, SIRE and 113 with **free media space each year**



**Ocean Outdoor** proudly supports “het Prinses Máxima Centrum”. With this partnership, Ocean Outdoor helps to **raise awareness by contributing media space at no cost**



1) The case studies mentioned in this report are illustrative and reflect broader initiatives being embraced in the market

2) CPM (Cost Per Mille) is a common advertising metric that represents the cost of one thousand impressions - i.e., how much it would typically cost to reach 1,000 viewers or users with a media placement

# Governments use OOH media to rapidly reach a broad public with urgent messages, such as AMBER alerts



## Supporting communities through public infrastructure<sup>1)</sup>

Amplifying national safety: The Dutch government leverages OOH networks to rapidly broadcast AMBER alerts, NL alerts and investigation notices

- AMBER Alert is the **Netherlands' highest-urgency public warning**, issued only when police believe **a missing child is in immediate danger**
- Since 2021, AMBER Alerts are distributed via Burgernet with the ambition to ensure nationwide reach across digital and physical channels
- Alerts are displayed on **digital screens** at train, bus and metro stations, airports, shops and petrol stations, enabling rapid awareness in dense mobility hubs
- **All Media Members** allow municipalities to override all digital street displays (e.g., street MUPs) to show AMBER Alerts in real time, enhancing visibility in urban centres



1) The case studies mentioned in this report are illustrative and reflect broader initiatives being embraced in the market

# Media owners have been involved in upgrading public infrastructure...

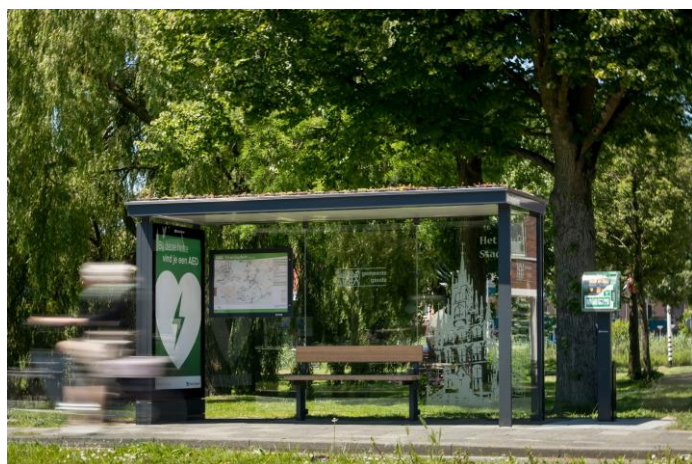


## Supporting communities through public infrastructure<sup>1)</sup>



Provision of life-saving defibrillators: Bauer Media Outdoor installed 5 AEDs in bus shelters that were used 42 times since 2023

- Bauer Media Outdoor has **installed several AEDs (Automated External Defibrillators)** in Dutch bus stop shelters. The AEDs are placed in so-called “blind spots”
- This provides a public benefit in the form of access to medical equipment that may contribute to the survival of people suffering from a heart attack; the AEDs have been **used 42 times since they were implemented**
- The sooner an AED is used, the higher the probability of survival gets – an example of a public private partnership that fits Bauer Media Outdoor’s role of being a “Platform for Good”



## JCDecaux

Strengthening urban connectivity: JCDecaux has equipped over 200 bus shelters with 4G-enhancing cells across Amsterdam

- JCDecaux **equips bus shelters with small cells**, in partnership with Huawei, Alcatel-Lucent, Vodafone, and KPN, to meet the growing demand **for mobile data in cities**
- These Small Cells **boost 4G network performance**, connected to the fiber-optic network and installed at optimal height for maximum efficiency
- Over **200 Amsterdam bus shelters now contain these small cells**, leveraging the dense and strategic spread of JCDecaux locations in urban centers



1) The case studies mentioned in this report are illustrative and reflect broader initiatives being embraced in the market

# ...and the sector promotes civic participation through various initiatives



## Context

- Children from Enschede's Velve and Dolfia neighbourhoods were invited to dream, draw, and speak up about **what they want to change in their area** - from cleaner parks to safer play spaces
- In a creative workshop with youth workers and local partners, their ideas were turned into bold, **colourful artworks**
- Global Media transformed everyday bus shelters by prominently displaying these posters in the children's own neighborhoods



## Global Media contribution

- Global Media transformed bus shelters into public art galleries where children could make their voices heard
- Global Media organised and facilitated **hands-on creative sessions** to help young people translate their thoughts into expressive, eye-catching drawings
- The posters were then professionally enlarged and produced, making the children's messages visible to a wider audience, including local residents and policymakers



## Stem van de Straat



*“OOH has a greater societal influence than many realize. Positioned at the heart of public life, our medium carries a responsibility: To use these shared spaces to unite communities and drive meaningful change”*

Media owner 3

# Collectively, the sector donated a total value of c.€2m to charities<sup>1)</sup> in 2025

## Context

- On 27 October 2025, the new cultural experience 'Amsterdam in Motion' opened at Westergas, celebrating the city's 750th anniversary
- The initiative is a collaboration between Westergas and the Amsterdam Museum, supported by a coalition of Amsterdam partners
- **JCDecaux is founding partner** and played a key enabling role



## JCDecaux contribution

- **€750,000 founding investment enabling the development of Amsterdam in Motion**, including the world's largest multimedia scale model of the city
- **Free access for all youth** ensuring Dutch youth can learn about Amsterdam's history, culture, and future without financial barriers

## Amsterdam in Motion





## 4. Environmental impact

*“From long-lasting, recyclable street furniture to green electricity: OOH has become one of the most sustainable media channels. This proves that visibility and responsibility can go hand in hand”*

Media owner 2

# Sustainability has become a strategic priority for OOH media owners, who are aiming to reduce Scope 1, 2, and 3 emissions through measurable initiatives

## Scope 1

- **Scope 1** includes emissions from owned or controlled sources, such as on-site energy
- *For example, emissions from vans used for billposting*

## JCDecaux

- JCDecaux now **operates a 100% electric service fleet** for daily maintenance
- This reduces **Scope 1 emissions in the process**



- Bauer Media Outdoor uses a **100% electric service fleet**
- This **reduces their Scope 1 emissions** in the process

## Scope 2

- **Scope 2** includes indirect emissions from purchased energy that is generated off-site
- *For example, electricity purchased from a utility company to run digital screens*



- Ocean Outdoor uses **100% sustainable electricity to power** their assets
- Transitioning to 100% renewable electricity **eliminates Scope 2 emissions**



- All Global Media's digital advertising assets are powered by green electricity
- This **eliminates Scope 2 emissions** and supports a cleaner energy grid

## Scope 3

- **Scope 3** includes all indirect emissions that occur in the value chain of a reporting company
- *For example, emissions from procured materials, such as billboard casings*

## blowUPmedia®

- blowUP media **reduces Scope 3 emissions** by using **100% recycled PET for its Giant Posters**



- Ocean Outdoor **reuses each analogue billboard banner up to 12 times**
- **In addition**, they ensure 100% of used banners are **either upcycled into new products** (e.g., laptop sleeves, bags)

# Media owners are adopting various measures to promote environmental progress and effect positive change (1/2)



## JCDecaux contributes to greener, more sustainable cities through their Green Mile initiative

- **The Green Mile** transforms Amsterdam's Stadhouderskade into a **greener, safer, pedestrian-friendly urban corridor**, replacing car-dominated space with nature, walking routes and biodiversity features
- It concerns a large-scale project involving leading institutions, such as the Rijksmuseum, Heineken, De Nederlandsche Bank, and the Amsterdam University of Applied Sciences. The project focuses on creating a healthier street environment, with more greenery, less traffic, and more space for public life



## Bauer Media Outdoor supports greener, more climate-friendly cities with their sustainable innovations

- **Since 2019, Bauer Media Outdoor has been promoting biodiversity and urban cooling** by installing bus shelters with green roofs. This not only enhances the streetscape but also provides habitats for bees, butterflies, and birds
- Also, sedum tiles are added behind shelters in cities, not only improving the street image, but also capturing rainwater



## blowUP media enriches urban areas with Vertical Gardens surrounding Giant Posters and digital screens

- **To regreen cities**, blowUP media installs Vertical Gardens along digital screens and giant posters
- Their aim is to boost biodiversity, cool overheated urban areas, improve air quality and positively transform the look and feel of city streets

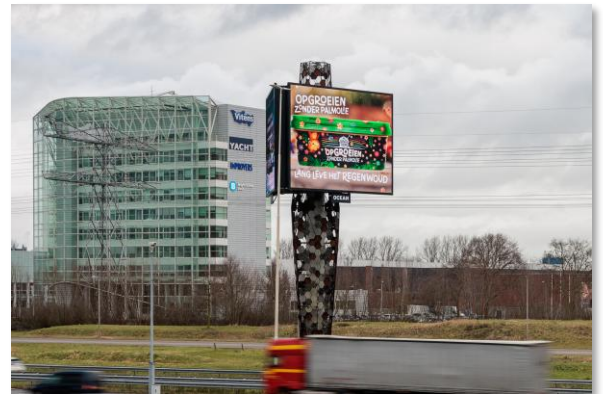


# Media owners are adopting various measures to promote environmental progress and effect positive change (2/2)



## Ocean Outdoor's billboard along the A2 highway contains more than 200 nesting boxes for bees and butterflies

- **Bees are crucial for biodiversity and food production**, yet in the Netherlands around half of the 385 wild bee species are under threat. To address this, Ocean Outdoor, the municipality of Utrecht, and Honey Highway have created a 28-metre-high structure along the A2 that combines nature and architecture
- The structure features a **honeycomb façade and includes more than 200 nesting boxes for bees and butterflies**, made from recycled materials by people distanced from the labour market. The digital screens are additionally dimmed at night to reduce light disturbance



## Global Media and The Pollinators work together to increase biodiversity in Dutch cities

- Global Media and The Pollinators work together to **increase biodiversity in Dutch cities**, raising awareness of declining pollinators through sustainable Adshel shelters - featuring LED lighting, solar panels, recycled materials, sedum and wildflower roofs, and even planned bee hotels



# Rising sustainability requirements in public contracts are catalysing sector-wide initiatives and accelerating environmental ambition



## Members actively aim to lower energy use and innovate with green technologies...

- **Cut grid emissions without loss of performance:** JCDecaux, Global Media's and Ocean Outdoor power installations with 100% green electricity, directly reducing Scope 2 emissions
- **Lower energy use and OPEX:** Bauer Media Outdoor, Ocean Outdoor, JCDecaux, and Global Media use 100% LED lighting for new installations. They are also replacing existing TL lights with LED, reducing kWh consumption. blowUP media's screens run on 99% green energy, and two-thirds of its Giant Poster sites also use green-powered LED lighting
- **Reduce running power intelligently:** Ocean Outdoor uses solar-supported masts with content-aware brightness control. This initiative is lowering energy draw and associated CO<sub>2</sub> emission
- **Shrink embodied carbon in hardware:** Global Media uses energy-efficient screens produced in the EU. In addition, they use recycled aluminum. These initiatives help improve the environmental performance of the supply chain



## ...and try to improve the durability of infrastructure, reducing waste in the process

- **blowUP media cuts material waste** by printing on 100% recycled material, made from 100% recycled PET bottles, free of any PVC and using water-based ink. blowUP shows how design choices can substantially reduce environmental impact
- Global Media **designs bus shelters to last around 40 years**. This leads to fewer replacements, less raw-material demand, and lower CO<sub>2</sub> over the asset lifecycle
- Bauer Media Outdoor **applies a refurbish-first approach**, re-using whole shelters across new concessions and repairing or repainting parts to extend asset life instead of producing new units
- Other OOH media owners **reduce CO<sub>2</sub> emissions** by using recycled aluminum or sourcing glass within Europe

*“Governments are increasingly prioritising sustainability. That is why we have embedded environmentally responsible practices into our operations. We use wind energy, recycled aluminum, and electric service vehicles, and reuse materials wherever possible. In doing so, our OOH infrastructure better aligns with public sustainability goals while supporting both our clients and the environment”*

Media owner



## 5. OOH market outlook

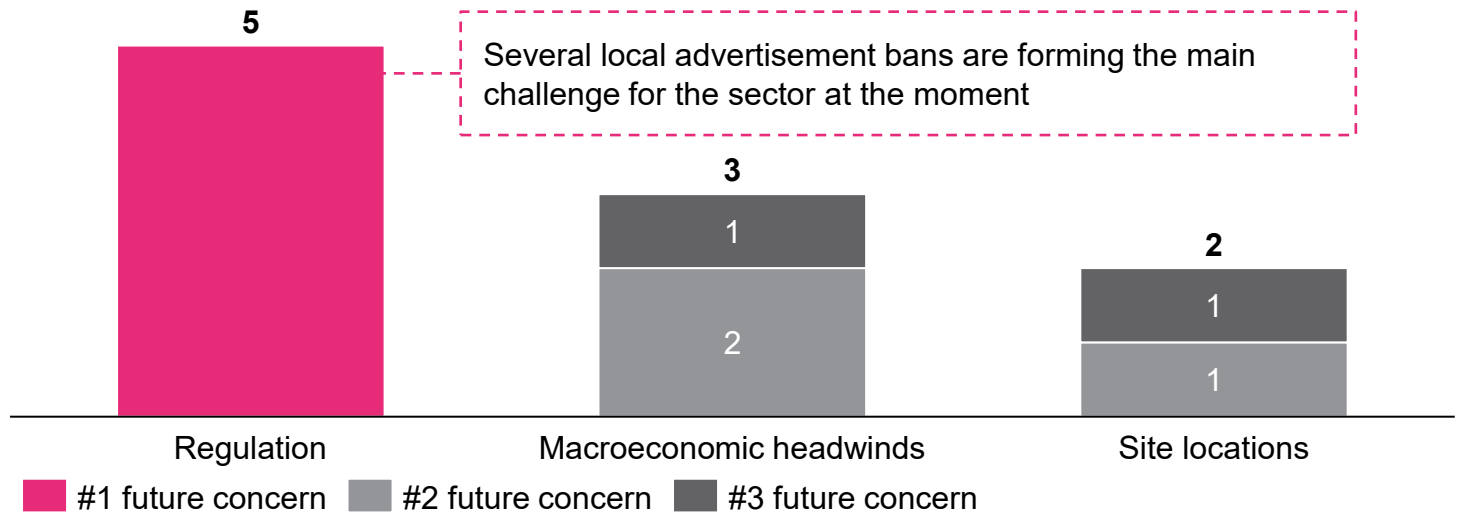
*“Increasing local advertising restrictions are putting real pressure on the OOH sector. When every municipality introduces its own rules, it becomes impossible to offer the national reach that advertisers depend on”*

Media owner 1

# Members highlight regulatory changes, such as varying rules between municipalities, as key challenges within the sector

## Concerns in the OOH sector

%, n = 5



“Our biggest challenge is the **growing fragmentation in local regulation**. We can work effectively with nationally coordinated rules, but **inconsistent local restrictions make it difficult to offer advertisers a unified national product**. More alignment would benefit both municipalities and the sector”

Media owner 1

“The regulatory landscape in the Netherlands is **becoming increasingly complex**, and the intentions behind certain **restrictions are not always clear**. While regulation is important, it should be **balanced with the societal benefits OOH can offer**”

Media owner 3

“Advertisers buy OOH as a national medium, but **local regulatory differences increasingly complicate that**. Municipalities, transport estates and retail environments all apply different rules, sometimes driven by local priorities. **This makes it harder to deliver consistent nationwide reach**”

Media owner 4



“**Economic headwinds mean clients expect more efficiency and measurable impact from every euro they spend**. The margins in our sector are generally not extremely high, and it is important for policymakers to **recognise how essential our services are**, because we **continue to invest in public infrastructure** even when conditions are challenging (e.g., during COVID)”

Media owner 1



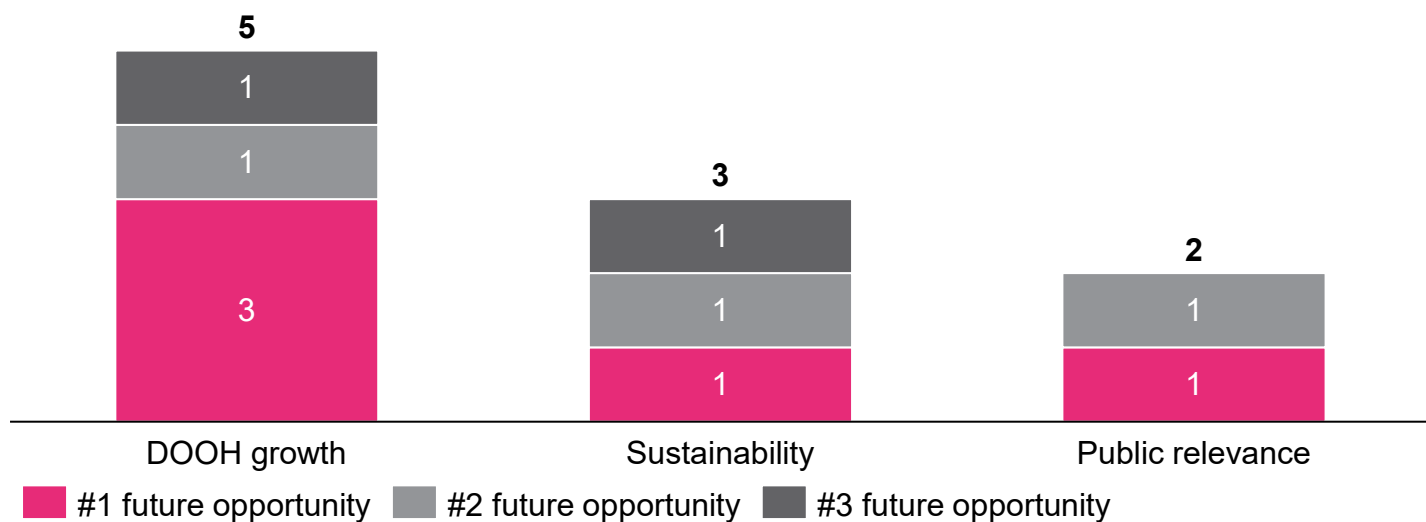
“The **market for new locations is tightening**. There are **fewer eligible sites**, and getting approval for even small additions has become harder. It means the **sector must do more with the locations we already have**”

Media owner 5

# Interviewees also note that there are many opportunities for the sector going forward, such as DOOH growth and sustainability

## Opportunities in the OOH sector

%, n = 5



DOOH

“Digitisation lets OOH combine **mass reach with digital intelligence**. We can optimise in real-time, match messages to moments, and prove impact in ways that make sense for modern marketers”

Media owner 2

“The real growth isn’t just in adding more screens, but in making them smarter. **Data-enabled DOOH lets us deliver relevance without losing the power of public space**”

Media owner 5



Sustain-ability

“Sustainability is becoming a **central part of how cities select their OOH partners**. Green shelters, circular materials and low-energy digital formats allow us to **improve public space while supporting municipal climate goals**”

Media owner 1

“From **green bus shelters to EV fleets and LED upgrades**, sustainability is driving both **innovation and cooperation with municipalities**. We see ESG ambitions shaping the next generation of OOH”

Media owner 6



Public relevance

“OOH is **uniquely positioned to support essential public communication**. It’s visible, trusted and immediate - exactly what cities need when they want to reach people in public space”

Media owner 3

“**Cities rely on OOH for crowd management, safety warnings, public alerts and cultural outreach**. That **civic function gives our medium long-term relevance far beyond advertising alone**”

Media owner 1



## 6. Appendix

# Glossary

Abbreviation	Explanation
<b>4G</b>	Fourth generation mobile telecommunications (connectivity)
<b>A2</b>	A2 motorway in the Netherlands
<b>AED</b>	Automated External Defibrillator
<b>AMBER</b>	AMBER Alert – the Netherlands’ highest-urgency public alert for missing children
<b>CAGR</b>	Compound Annual Growth Rate
<b>CAPEX</b>	Capital Expenditure
<b>COVID</b>	Coronavirus Disease 2019
<b>CPM</b>	Cost Per Mille (advertising metric)
<b>DNB</b>	De Nederlandsche Bank (Dutch central bank)
<b>DOOH</b>	Digital Out of Home (advertising)
<b>ESG</b>	Environmental, Social and Governance
<b>EU</b>	European Union
<b>EV</b>	Electric Vehicle(s)
<b>HKU</b>	University of the Arts Utrecht (Hogeschool voor de Kunsten Utrecht)
<b>KPN</b>	Royal KPN (Dutch telecommunications company)
<b>LED</b>	Light Emitting Diode
<b>NL</b>	The Netherlands
<b>MUPI</b>	Street furniture advertising panel (Mobilier Urbain pour l’Information)
<b>OOH</b>	Out of Home (advertising)
<b>OPEX</b>	Operational Expenditure
<b>PET</b>	Polyethylene Terephthalate (recycled plastic)
<b>PVC</b>	Polyvinyl Chloride (plastic material)
<b>SIRE</b>	SIRE – Stichting Ideële Reclame (Dutch social advertising council)
<b>SME</b>	Small and Medium-sized Enterprise(s)
<b>TL</b>	Tubular Lamp (fluorescent tube)

# Thank You

Thank you for taking the time to read our report

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