



2025

CANADIAN OUT-OF-HOME ANNUAL REPORT

Executive Summary

2025 may well be seen as a defining year for the Canadian Out-of-Home industry.

On the back of steady economic growth, rising advertising investment, and a sustained return to physical movement across cities and communities, Out-of-Home grew its revenues by 5.8% year-over-year.

The last 12 months saw Canada as a country that is truly back in motion. Commuting levels are up, transit use continues to grow, and Canadians are spending more time (and money) out of the home, particularly in the pursuit of shared experiences — dining out, live events, sports, shopping, cinema attendance etc. The result of all of this is there are more people out of the home, more often and spending more of their time engaged with the only medium truly centred in the physical world.

Whilst the year was dominated by the launch of the industry's new Measurement Currency ROADMAP RF, this should not overshadow the industry consolidation that took place across 2024 and into 2025 along with the increased investment from COMMB, media owners and operating platforms alike. That has further strengthened the landscape, creating better products, a new OOH planning Platform (ROADMAP), greater scale, improved transaction processes, and simplified buying pathways. The result is that the foundations are now in place for further industry growth going into 2026 and beyond.

Looking ahead, 2026 represents a year of opportunity. Globally and domestically, Out-of-Home is moving from resilience to leadership. As brands refocus on trust, attention, cultural relevance, and real-world impact, Out-of-Home stands apart as the only medium fully embedded in lived environments. Major events, retail activation, immersive creative, automation, and next-generation measurement will accelerate the channel's momentum.

COMMB continues to help power this growth. Through transparent revenue reporting, industry marketing, the launch of COMMB's Insights Suite, the ROADMAP planning and inventory platform, education initiatives, national events, and enhanced measurement frameworks, COMMB is advancing the tools, standards, and advocacy required to strengthen Canadian Out-of-Home for the benefit of all members and stakeholders.

As I step into my new role at COMMB, I look forward to building on the strong momentum across Canada's Out of Home industry and I would like to thank Adam Butterworth for his leadership and contributions to the organization.

Lindsey Talbot
President of COMMB



The momentum built in 2025 has positioned the industry for a pivotal year ahead. With stronger integration, smarter technology, and sustained advertiser confidence, Canadian Out-of-Home enters 2026 not just growing — but leading.

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Reasons to be Cheerful

01

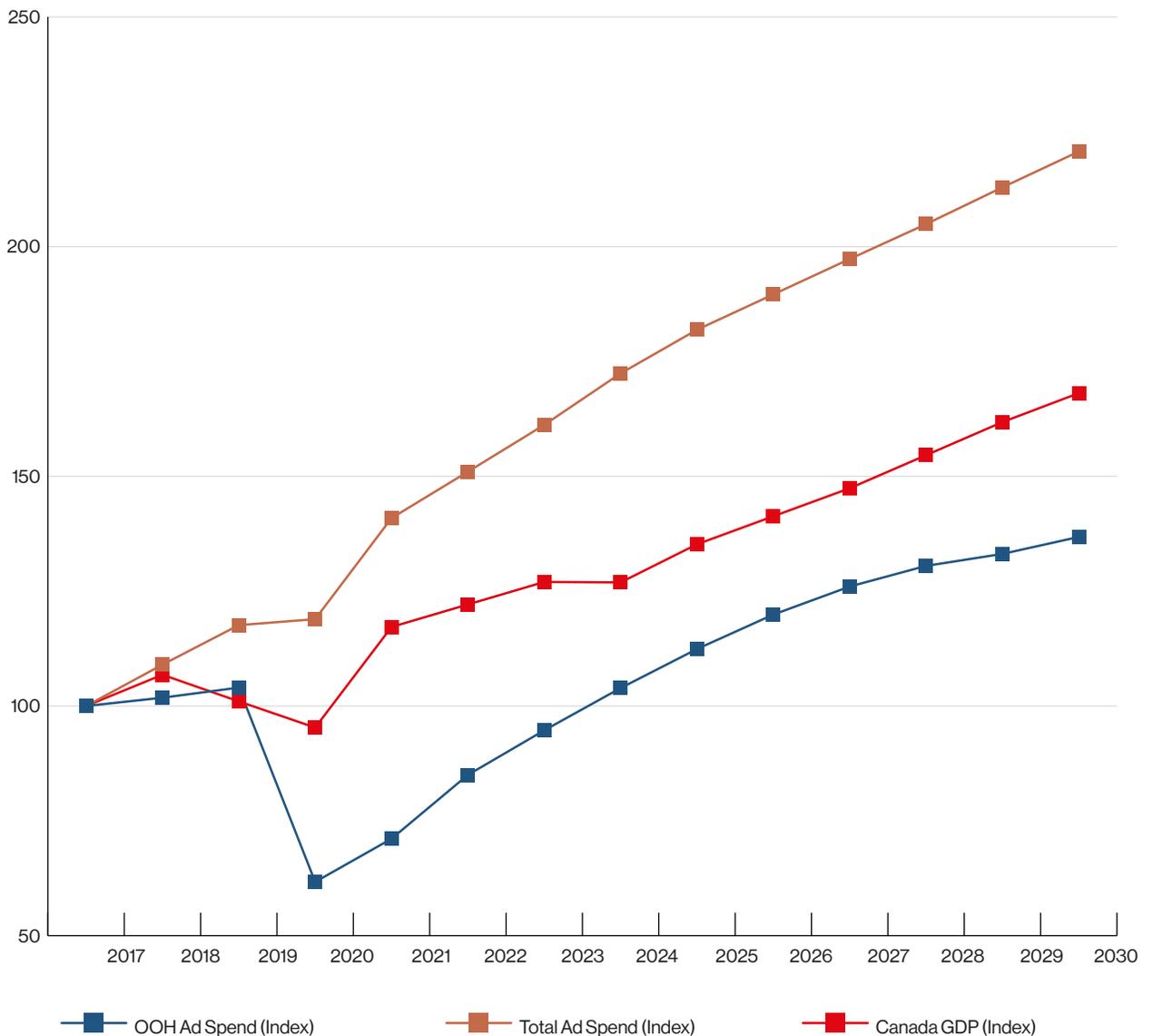
2025 was a year where key economic & demographic drives strengthened Out-of-Home's role in the media & advertising landscape.

Reasons to be Cheerful

Growth in motion: Economic Impact & Out-of-Home moving in parallel

Canada's long-term GDP growth shows steady expansion, a pattern that closely aligns with trends in Out-of-Home and overall advertising revenue.

As brands invest more in Out-of-Home, they benefit from real-world visibility, strong performance, and renewed confidence — driving sustained investment and long-term growth.



Source: Statista Market Insights

Traffic & Transit

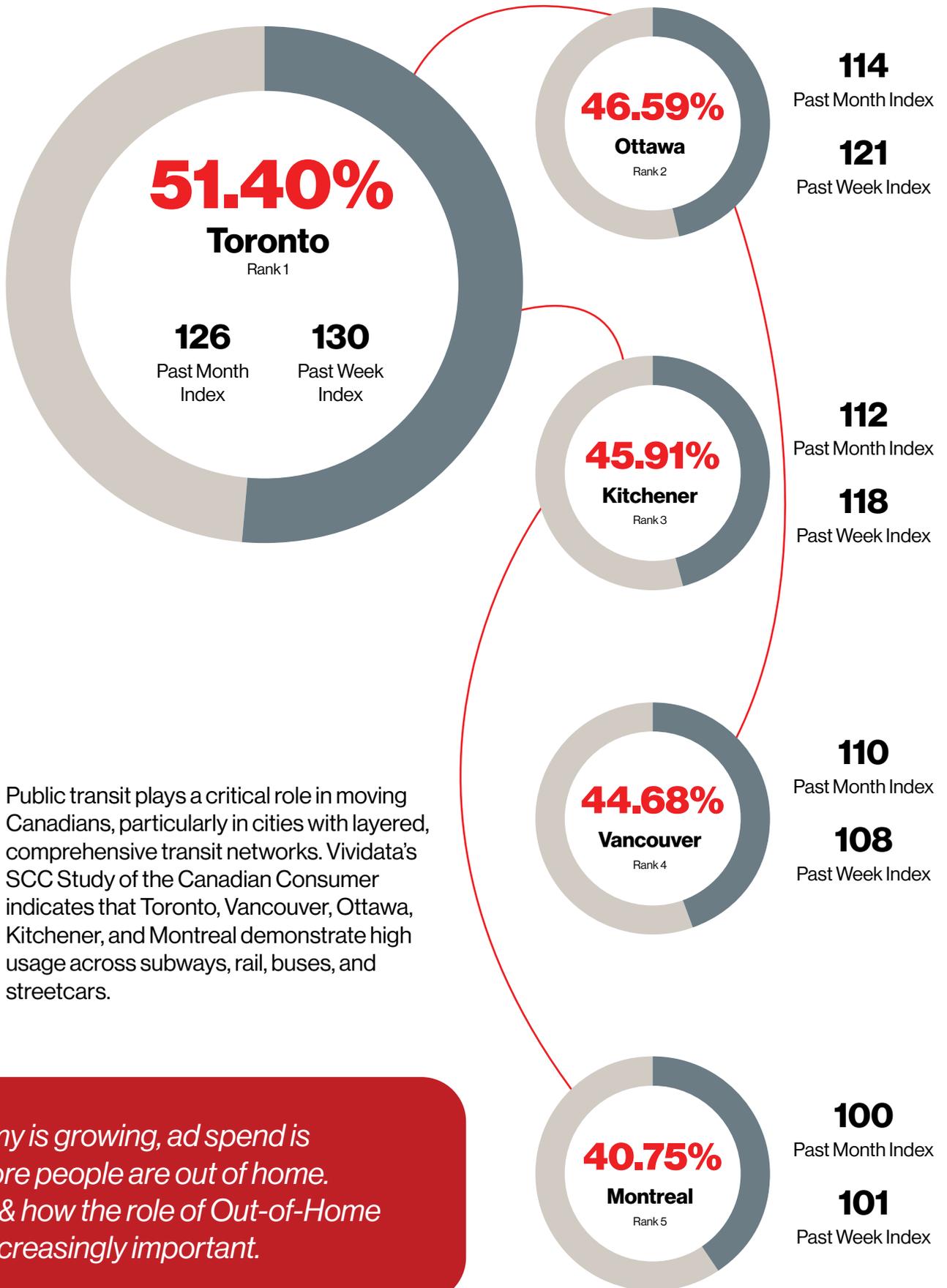
Canadians are back in motion. With over 80% commuting to physical workplaces—and 80% of commuters travelling primarily by vehicle—daily movement across Canada’s roads and transit systems increased year-over-year. Six of North America’s most congested urban markets are now in Canada, with Vancouver recording the highest average travel time per 10 km and Toronto experiencing the largest increase in travel time since 2023. While this shift presents challenges for commuters, it represents a significant opportunity for Out-of-Home, with audiences exposed to the medium more frequently, for longer durations, and at greater scale.

World rank	City	Average travel time per 10 km	Time lost per year at rush hours
25	New York, NY 	31 min 6 s	98 hours
69	Vancouver 	27 min 3 s	86 hours
75	San Francisco, CA 	26 min 32 s	84 hours
95	Toronto 	25 min 13 s	77 hours
117	Halifax 	23 min 31 s	83 hours
129	Winnipeg 	23 min 1 s	74 hours
149	Montreal 	22 min 9 s	70 hours
195	Honolulu, HI 	20 min 39 s	73 hours
202	London 	20 min 22 s	60 hours
218	Chicago, IL 	19 min 51 s	65 hours
220	Edmonton 	19 min 49 s	50 hours
273	Calgary 	18 min 11 s	49 hours
307	Ottawa 	16 min 56 s	55 hours
317	Hamilton 	16 min 46 s	39 hours
325	Quebec 	16 min 41 s	49 hours

Source: TomTom Traffic Index Ranking 2025

As congestion remains a daily reality in Canada’s largest cities, Out-of-Home transforms time spent in traffic into meaningful brand opportunities. High visibility, repeated exposure, and uncluttered environments allow Out-of-Home to build awareness and recall at scale — meeting audiences when they are present, alert, and focused. In moments when multitasking is limited, Out-of-Home delivers attention where it matters most.

Transit



Public transit plays a critical role in moving Canadians, particularly in cities with layered, comprehensive transit networks. Vividata's SCC Study of the Canadian Consumer indicates that Toronto, Vancouver, Ottawa, Kitchener, and Montreal demonstrate high usage across subways, rail, buses, and streetcars.

The economy is growing, ad spend is growing, more people are out of home. What's why & how the role of Out-of-Home becomes increasingly important.

2025

Key Consumer Behavioural Shifts

Entertainment & Spending Patterns

Entertainment outpaced all other spending categories, with dining out, concerts, sporting events, and live experiences growing by **more than 10% year over year**. These activities now account for **nearly 17%** of total consumer spending.

This shift means more movement through public spaces—heading to dinner, lining up for a show, travelling to a game, or meeting friends before a night out. These shared, social moments naturally create high-impact environments for Out-of-Home advertising. Positioned along entertainment corridors and gathering places, Out-of-Home becomes part of the experience itself—reaching audiences when they're relaxed, engaged, and receptive to what's around them.

Yahoo Finance, TD Economics

Shopping Behaviour

The Problem: The Rising “Precarity Mindset”

85%

Price Trumps All Other Factors

Canadians ranked price as the top influence on their buying decisions.

62%

Local Values vs. Economic Reality

Concern over rising import prices was a stronger driver for local sourcing.

61%

Growing Affordability Anxiety

Canadians lacked confidence in their ability to afford groceries by late 2025.

Nearly half say they really enjoyed shopping, and close to three-quarters have visited a shopping mall in the past month.



The Solution: Strategies for Retail Resilience

78%

Empower Staff with Data

Shoppers said data-driven tools support staff in delivering faster service and better assistance.

60%

Optimize the Omnichannel Experience

Still struggle to avoid frustrations like shipping delays and returns processing.

Consumer Priority | Statistical Impact

85% Price as top factor

26% Willing to pay for health benefits

92% Influenced by loyalty programs



All signs point to a lasting “precarity mindset,” where thoughtful, value-driven shopping becomes the norm, not a phase. For brands and retailers, this reinforces the importance of showing up clearly and consistently across channels. In a world where consumers are weighing every dollar, omnichannel strategies — including high-impact Out-of-Home — can help reinforce value, build confidence, and stay top-of-mind right up to the moment of purchase.

See It On The Big Screen

More than half of Gen Z have been to a movie theatre in the past three months, making them significantly more likely than other audiences to attend regularly.

Four in ten Gen Z moviegoers say they arrive on time specifically to watch advertisements and trailers.



This makes cinema a rare, high-attention environment where advertising is welcomed rather than skipped. And the opportunity doesn't start or end at the screen. Trips to the movies generate movement through transit routes, retail areas, dining districts, and entertainment zones. Out-of-Home advertising extends the impact of cinema by building awareness before the film and reinforcing messaging after—connecting with Gen Z when they're out, social, and fully tuned in.

Canadians 18+ | The Study of the Canadian Consumer, Fall 2025

Canadians are out and engaged, seeking shared, experience-driven moments — right where Out-of-Home delivers.



Think Canadian. Buy Canadian.

~80% of Canadians believe in 'buying local' which ultimately drives media buying behaviour.

Source: Interact Corp. (Interact), Interac Survey: Canadians' New Spending Mindset Benefits Main Street, February 20, 2025

WPP increased its investment in Canadian media to **45%** of its total media spending in 2025, with a **target of 50%** in 2026.

WPP, Shaping a Stronger Future for Canadian Media



Kevin Johnson

CEO of WPP Media Canada, 2025

"We're not just talking about supporting Canadian media; we're actively building the tools and systems to ensure it has a fair and successful future... turning words into real action."



Sarah Thompson

Executive Managing Director, Classroom

"New study reframes Canadian ad sector as a hidden GDP engine"



The research shows that every **\$1 million invested** in Canadian advertising adds \$1 million to GDP and **creates 8.2 jobs, contributing \$22.6 billion in total economic impact** in 2023.

95% of Canada's Out-of-Home inventory is owned by Canadian Companies. The vast majority of investment stays in Canada and supports the domestic economy.

2025

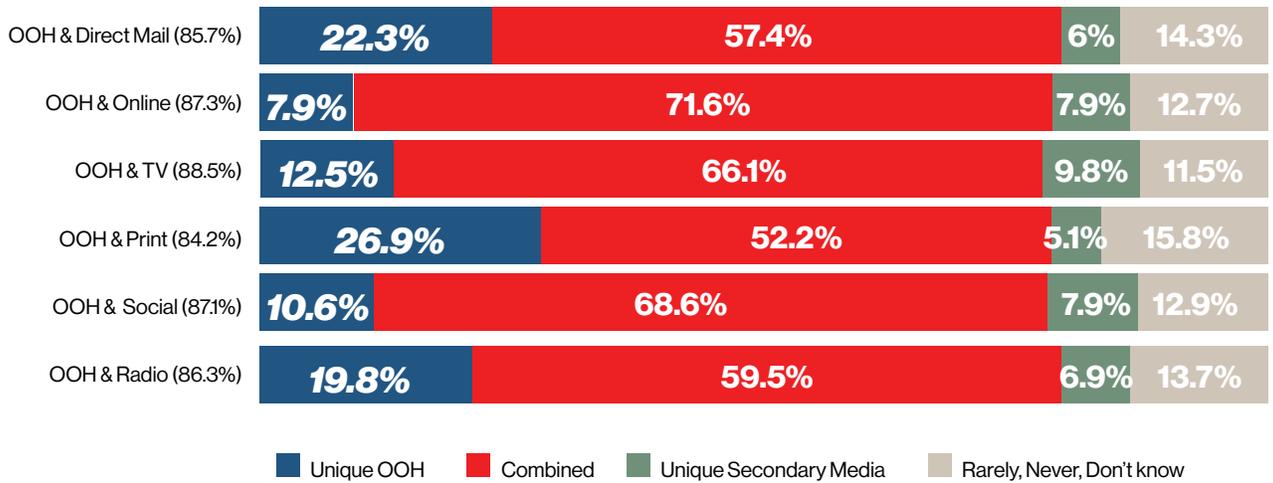
Key Takeaways

Omnichannel planning and buying isn't just a trend — it's the way modern media strategies are built. Out-of-Home sits at the heart of omnichannel media, amplifying other channels and boosting overall campaign reach by 23 %.

Source: Out-of-Home in the Media Mix, 2023, COMMB, Leger Online Panel

The Omnichannel Medium

Out-of-Home, the Media Amplifier



Out-of-Home has demonstrated success when applied to the media mix. This was prevalent in 2025, as Out-of-Home provides both mass messaging and localized targeting.

Source: WARC, What we know about out-of-home effectiveness, July 2025



David Nagy

Founder of eCommerce Canada



"Brands that do omnichannel marketing well are usually driven by data... they understand where their customer has come from and the multiple ways that they've been touched by the brand – from brick-and-mortar stores to online sales."

Digital Out-of-Home: The Real-World Extension of Digital Media

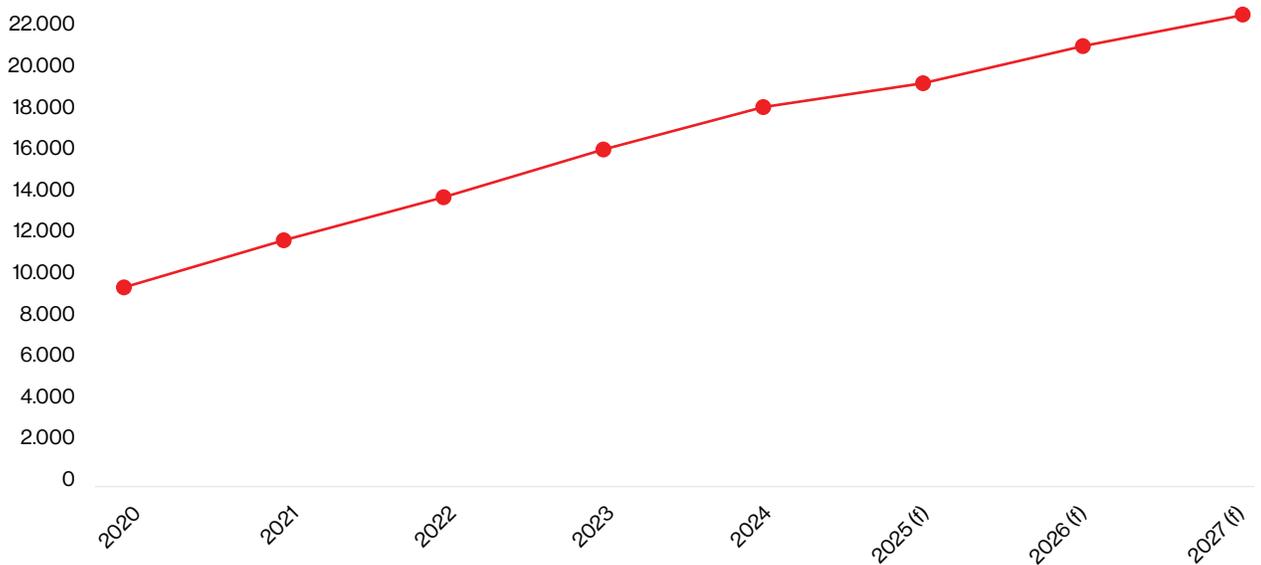
As the online digital ecosystem evolves, so does the role of Out-of-Home. While digital spend is increasing overall, there are lots of under currents enhancing the role of Out-of-Home.

While online media grows, it's losing ground to walled gardens, facing rising brand-safety concerns, and an increasing AI/bot-driven measurement challenge. **Digital Out-of-Home (DOOH) offers a transparent, high-impact alternative**, delivering measurable, scalable reach in real-world environments. In 2025, DOOH gained momentum in Canada, and its growth is set to continue as it integrates further into omnichannel campaigns.

Source: WARC, Three themes defining the future of programmatic in 2025

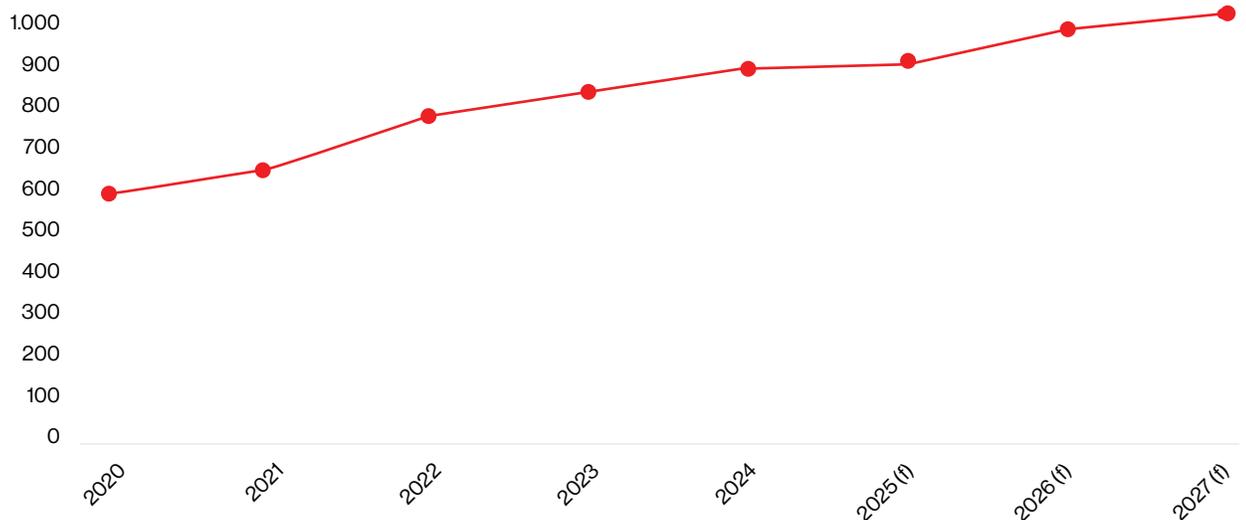
Growth of Digital Online Ad Spend in Canada

Source: WARC, Ad Spend Canada, All Categories, Ad Spend, Q1 2020 to Q4 2026



Growth of Out-of-Home Digital (DOOH) Ad Spend in Canada

Source: WARC, Ad Spend Canada, All Categories, Ad Spend, Q1 2017 to Q4 2027



Out-of-Home is becoming increasingly digital and part of the growing digital ecosystem. It has evolved fairly quickly. What was simply online & video, has now expanded to include streaming, audio and now Out-of-Home. Out-of-Home is an integral part of this.

“Phydigital” & Contextual Creative

Consumers behave in a way that blurs the lines between physical and digital spaces, creating significant opportunities for contextual Out-of-Home advertising.

While e-commerce provides convenient, at-home shopping experiences, physical spaces remain powerful drivers of impulse and tactile purchases.

81%

reporting they have shopped both in-store and online recently.

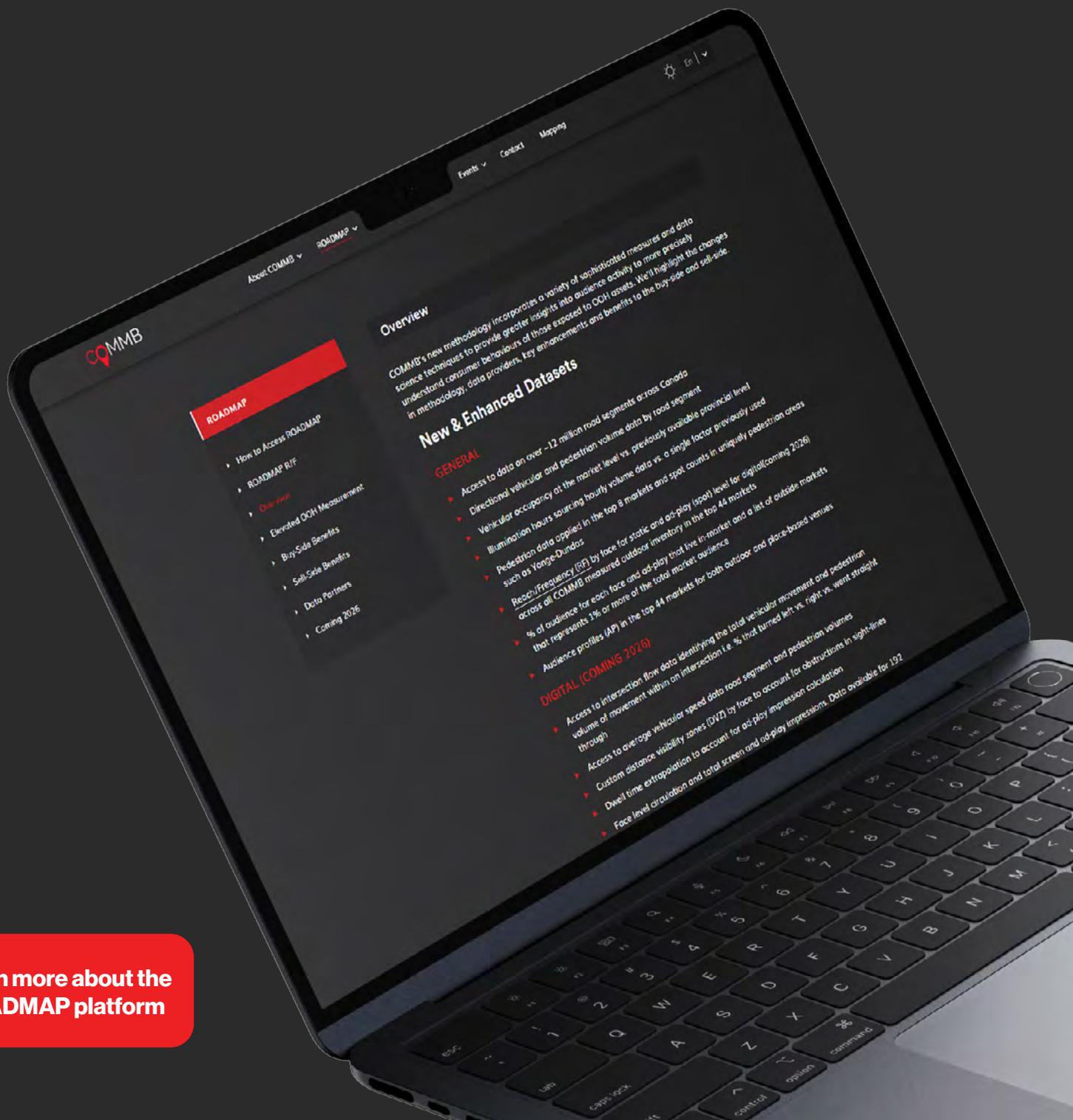
Source: WARC, “What we know about out-of-home audiences”

Out-of-Home bridges physical and digital worlds, delivering contextually relevant, “phygital” experiences where real-world choices happen.

ROADMAP

As Out-of-Home's role expands across physical and digital spaces, a new generation of audience measurement is redefining how the medium is planned, valued, and measured in Canada.

COMMB's ROADMAP planning and inventory management platform, alongside the ROADMAP R/F component for Roadside inventory - launched in 2025.



Learn more about the
ROADMAP platform

Investment & Consolidation

Year 2024

Bell acquires OUTFRONT Media's Canadian business

January 2025

T-Mobile acquires Vistar Media

April 2025

- Jungle Media Canada and Camp Jefferson Canada merge to become Mekanism Canada
- G3 Media acquires portion of Bell/Astral Media's inventory. VENDO Media becomes exclusive sales arm for their English Canada inventory.

May 2025

VENDO Media announces partnership with 902 Sign Group in Cape Breton, NS.

July 2025

VENDO Media Acquires Canada Billboards

November 2025

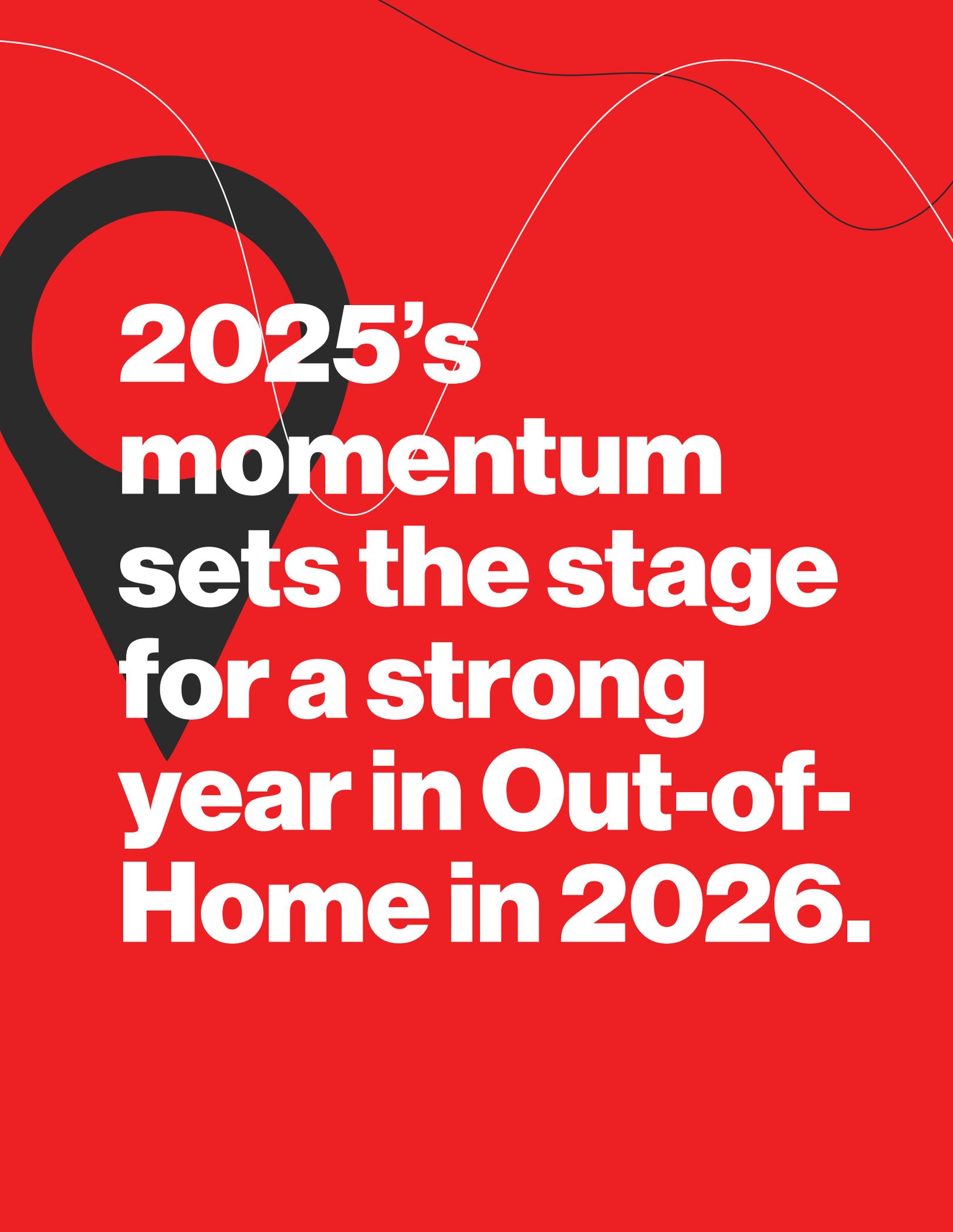
- UB Media Acquires PATTISON Outdoor's Residential Network
- UB Media Acquires Bell/Astral Media's Lifestyle Network

December 2025

- Broadsign acquires Place Exchange
- Cineplex Media adds 35 Landmark Cinemas to its network

The result is a more consolidated landscape — making Out-of-Home easier to plan, easier to buy, and easier to scale.

As omnichannel planning accelerates, Out-of-Home is becoming increasingly central. As digital extends into the physical world, Out-of-Home stands apart as the only medium truly embedded in real environments. With increased investment, consolidation, and stronger audience measurement, the channel is well positioned for the future.



**2025's
momentum
sets the stage
for a strong
year in Out-of-
Home in 2026.**

2026

The Year of Opportunity

04



Thoughts from WOO

(The World Out-of-Home Organization)



Tom Goddard

President of WOO (The World Out-of-Home Organization)

Out-of-Home enters 2026 with momentum, resilience, and renewed relevance. While planning horizons across media have shortened, Out-of-Home has proven its strength – delivering growth, creative leadership, and increasing share through digital transformation, improved transacting, and trusted measurement. As advertisers refocus on brand building and seek alternatives to over-concentrated online platforms, Out-of-Home stands out as the medium that has adapted without losing its power. With industry consolidation, global collaboration, and renewed advocacy led by WOO, 2026 shapes up as a pivotal year – one where Out-of-Home moves from resilience to leadership on the global stage.



COMMB Member's Perspectives

To understand what lies ahead for Out-of-Home advertising in Canada, COMMB asked its members to share perspectives on the trends shaping the industry in 2026.

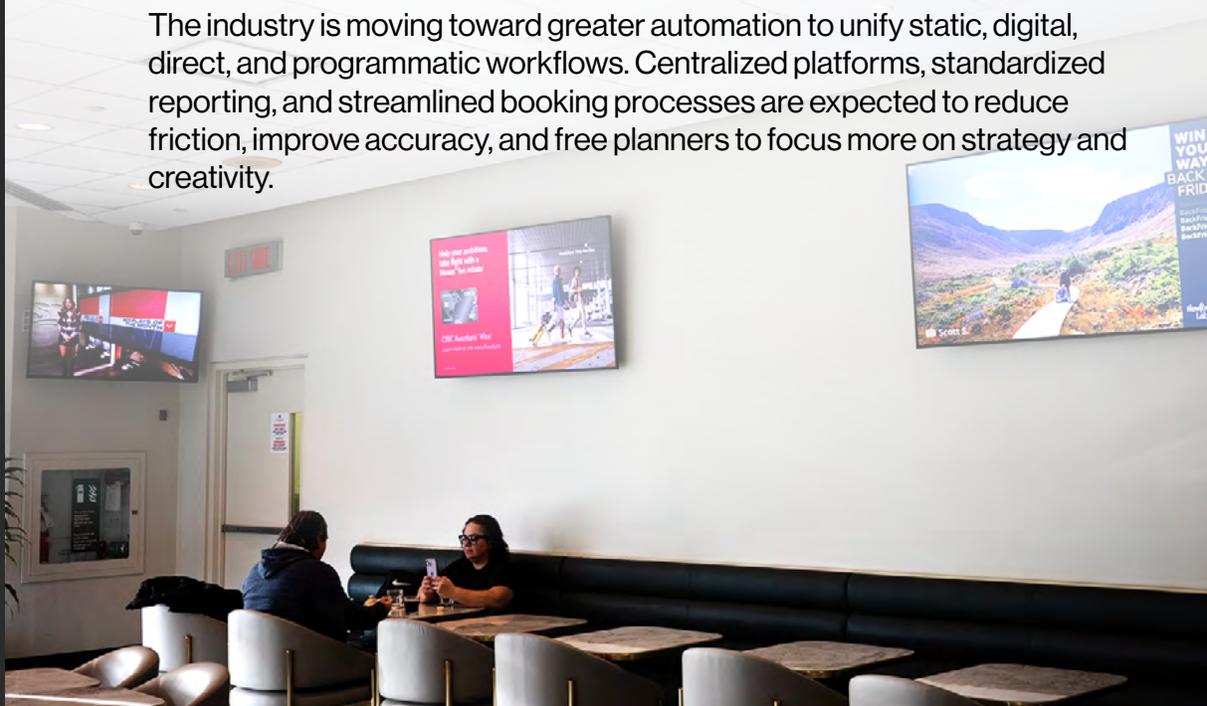
1

Out-of-Home stands out as a trusted, high-attention medium

In an environment marked by digital online saturation, algorithm fatigue, and growing consumer skepticism, Out-of-Home is valued for its permanence, credibility, and uninterrupted visibility. Since Out-of-Home doesn't rely on tracking individuals, it feels transparent and respectful, helping brands build credibility and trust.

2 Automation and simplification become critical to growth

The industry is moving toward greater automation to unify static, digital, direct, and programmatic workflows. Centralized platforms, standardized reporting, and streamlined booking processes are expected to reduce friction, improve accuracy, and free planners to focus more on strategy and creativity.



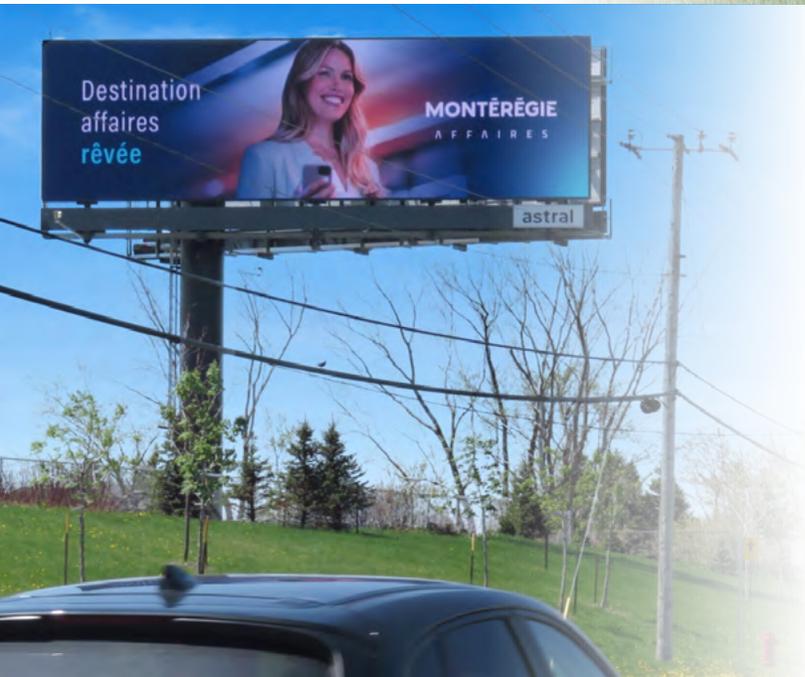


3 Out-of-Home strengthens its role in omnichannel planning

Out-of-Home is no longer planned in isolation. In 2026, it is increasingly integrated with digital online, social, retail media, and connected TV. Marketers are using Out-of-Home to extend reach beyond the home, reinforce messaging across the day, and create more cohesive, full-funnel media strategies where each channel plays a distinct role.

4 Larger, more ambitious and immersive executions

Campaigns are becoming larger, bolder, and more immersive, with increased use of large-scale formats, venue takeovers, sequential storytelling, and experiential creative. Emerging technologies — including AR, AI-driven design, 3D executions, and social amplification — are extending the impact of Out-of-Home beyond the physical placement and into cultural conversation. Its scale, permanence, and visual dominance make it the foundation for the industry's most ambitious executions — delivering impact, memorability, and creative authority in ways few other media can match.



5 Cultural relevance and real-time responsiveness gain importance

Brands are increasingly using Out-of-Home to show up in moments that matter most, including live events, social trends, entertainment releases, and major announcements. The medium's visibility makes it a powerful amplifier for cultural moments, turning campaigns, launches, and sponsorships into shared public experiences that often spark organic social sharing.

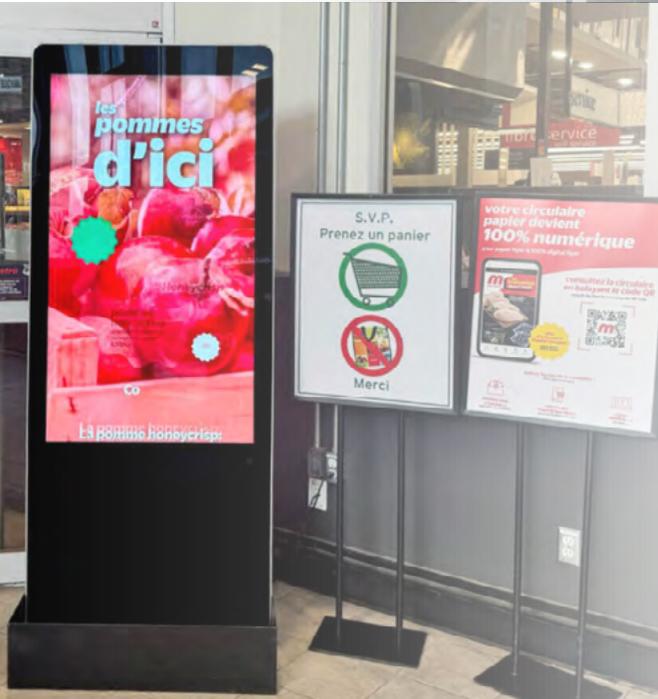
6 Sports, entertainment and major events drive opportunity

Global and national sporting events, entertainment moments, and tentpole cultural occasions are expected to fuel increased Out-of-Home activity. Programmatic DOOH enables brands to align quickly with these moments, scale presence across markets, and reinforce sponsorships or associations in real time.



7 Retail and path-to-purchase activation expands

Retail media continues to grow, with DOOH playing a larger role in influencing consumers closer to the point of decision. Brands are increasingly connecting in-store, near-store, and in-path environments with digital precision, using Out-of-Home to bridge awareness and action in real-world contexts.



8 Measurement and accountability remain central

As Out-of-Home becomes more automated and integrated, improved measurement, proof-of-performance, and reporting are critical to demonstrating ROI. Faster validation and clearer attribution help strengthen Out-of-Home's position alongside other channels in competitive media budgets.





9

Major events

Events like FIFA drive significant increases in travel and foot traffic across host cities, creating high-impact moments for Out-of-Home to connect with audiences at scale.

10

Sustainability efforts in Out-of-Home

The Out-of-Home industry is advancing urban infrastructure through sustainability-focused innovation, from solar-powered digital displays to EV-enabled media assets. OOH is transforming advertising into a lower-emission, socially responsible medium.



Industry Revenue Reporting

\$842+ M

Total: 2025 Canadian Out-of-Home Revenues

\$523+M

Roadside

\$124+M

Place-Based

\$194+M

Transit

The OOH market grew **5.8%**
year-over-year, with digital formats continuing
to drive momentum.

Digital OOH grew by **11.5%**
strengthening its position as the dominant
revenue engine of the sector.

Powering the Next Era of Growth for Canadian Out-of-Home

COMMB's Purpose: To drive the growth of Canadian Out-of-Home for the benefit of all its members and stakeholders.

Measurement

Delivering transparency, accountability, and confidence in Out-of-Home planning and investment.

A new era of digital roadside and place-based measurement is coming to Canada in 2026/2027 - bringing greater precision and accountability to the medium.

Marketing

Elevating the voice, value, and visibility of Out-of-Home within the broader media landscape by leveraging these medium strengths.

1 Communication Medium

2 Full Funnel Medium

3 Omnichannel Medium

4 Medium for Good

Education & Certification

Currently in development, the new Canadian Out-of-Home Certification Program will build the next generation of confident, capable planners and advocates for the medium. Upon completion, they will have the ability to advocate for the medium as well as possess the knowledge and skills to confidently include & execute OOH in any media.

COMMB Insights Suite Launching Q1 2026

The COMMB Insights Suite is a strategic planning toolkit built on respondent-level data to demonstrate how Out-of-Home connects with audiences and complements other media channels.

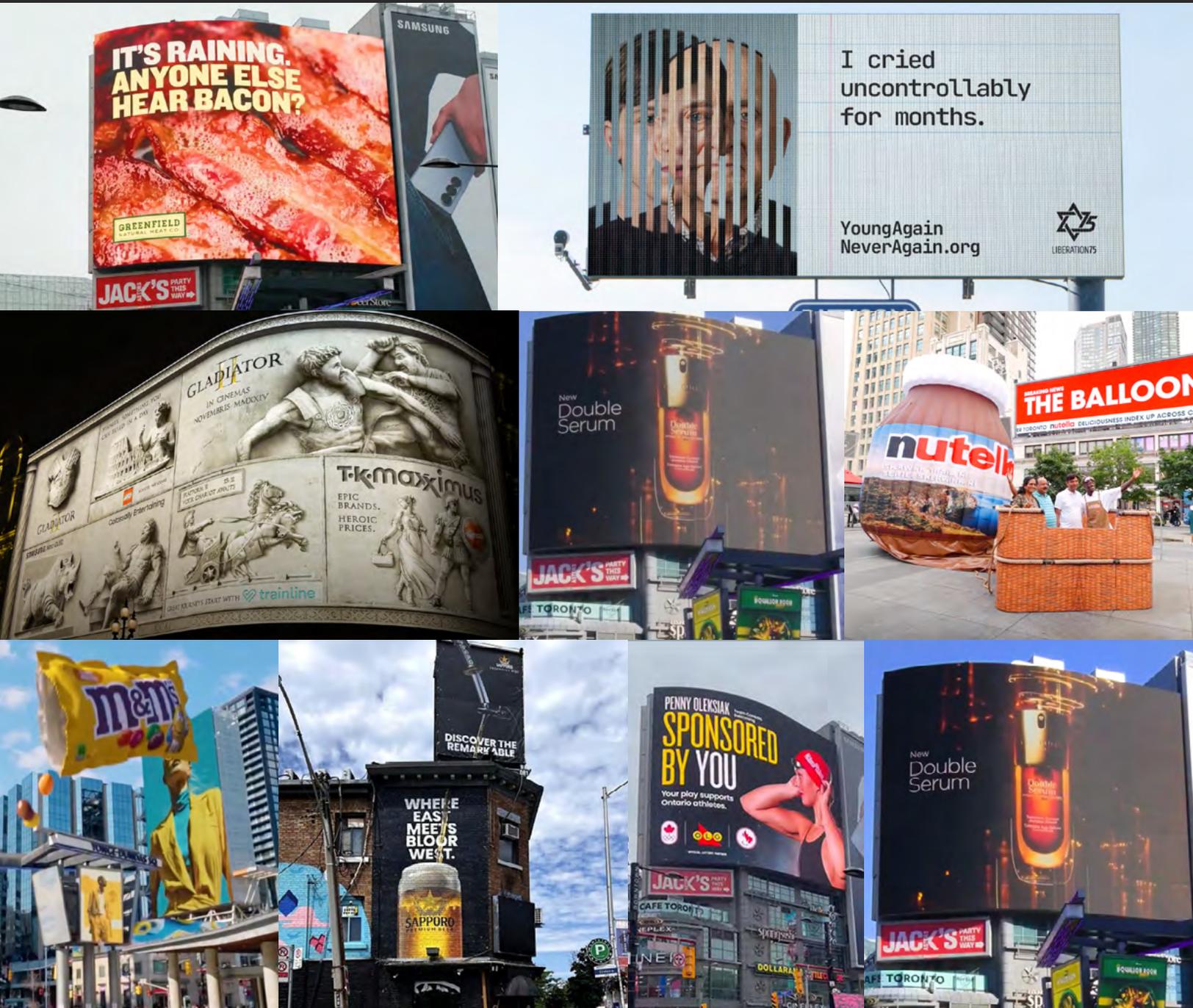
The Media Insights Platform is the first of several tools COMMB will introduce over the next 12-18 months.

COMMB

Events & Promotions

THE CANADIAN OUT-OF-HOME AWARDS 2026

The Canadian Out-of-Home Awards:
National awards show dedicated to celebrating
excellence across the entire Out-of-Home
industry in Canada.



2026 Events

AdClub Ski Day

Toronto, February 20

Show Canada

Alberta, May 19-21

Concours Idéa – A2C

Montreal, June 11

WOO

London, UK, June 3-5

AdClub Golf Day

Toronto, July

Canadian Out-of-Home Awards

Toronto, October 7

MIA's

Toronto, TBC

Abcom Christmas Party / Winter Social

Vancouver, Nov

AtoMiC Awards – Brunico

Toronto, March 26

AdClub Digital Day

Toronto, May 21

Marketing Awards – Brunico

Toronto, June

Abcom Golf Day Vancouver, July

DPAA

NYC, October 12

CMA Awards

Toronto, TBC

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Thank you!

