



The Power of Proximity: OOH Media and its Evolving Role in Connected Commerce

A Research Briefing
March 2026

Acknowledgements & Notice

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In particular, Winterberry Group is grateful to our research partner, the Out of Home Advertising Association of America, and our project sponsors:

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Introduction: OOH Plays Central Role in Connected Commerce Strategies

For years, advances in technology, data and media have been leading brands to pursue more holistic approaches to the planning of their paid and owned marketing efforts.

But today, brands are looking to do more than just *plan* holistically. They're aiming to *orchestrate* channel selection, timing and messaging so as to optimize interactions at every stage of the customer journey. The effort has grown so prevalent that's it's even taken a moniker of its own: **connected commerce**.

Foremost among the vehicles now delivering value as part of these efforts: out of home media. Long regarded as an essential pillar of branding and awareness efforts, OOH is growing to play a direct role in strategies designed to influence consumer engagement at, near and far from the point of purchase—bridging the physical and digital worlds in ways that few other channels can replicate.

This report explores OOH's evolving role in today's connected commerce programs. Drawing on a survey and interviews of marketers and agency executives engaged in omnichannel media buying, it will show that brands are **actively moving to integrate OOH into their cross-channel orchestration efforts**—with plans to tackle important challenges associated with measurement, addressability and other issues in the years ahead.

“OOH is growing to play a direct role in strategies designed to influence consumer engagement at, near and far from the point of purchase—bridging the physical and digital worlds in ways that few other channels can replicate”



Key Findings: Brands Looking to “Proximity” Benefits of OOH to Spark Impact as Part of Connected Campaigns



Connected commerce represents a strategic priority for brands and retailers—who are looking OOH media to play an increasingly central role in those efforts

- Connected commerce is now an enterprise-level priority, with 86% of marketers reporting they are “extremely focused” on building integrated, cross-channel engagement models
- OOH has become a foundational enabler of these strategies, with 98% of respondents viewing it as either a core (54%) or supporting (44%) component of their connected commerce programs



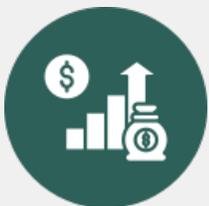
OOH delivers multi-dimensional value in support of connected commerce programs

- OOH’s impact on connected commerce initiatives is grounded in its balanced, multi-dimensional impact, with marketers citing cost-effective reach (52%), retail traffic lift (51%) and consistent cross-touchpoint messaging (51%) as principal benefits they associate with the channel



Digital formats dominate today’s “connected” programs, but brands see a role for virtually all OOH media—with proximity as the key driver of performance

- Digital formats now anchor OOH’s role in connected commerce, with marketers citing digital billboards (65%), digital in-store/point-of-purchase screens (63%) and digital promotional displays (57%) as the formats most prevalent as components of their integrated efforts



A sizable majority of connected commerce marketers expect to grow their OOH investment, leveraging expected advances in measurement, formats and cross-channel integration

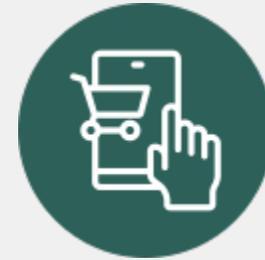
- Brands are committed to expanding OOH’s role within connected commerce; 86% expect their corresponding spending to increase over the next two years (with 37% projecting growth of 15% or more)
- The key factors that practitioners expect to drive that expanded spending: improved measurement and attribution capabilities (cited by 56% of panelists) and growing OOH inventory/format options (51%)

Converging Disciplines: How We Define OOH, Connected Commerce



Out of Home Media (OOH)

Any traditional or digital advertising format that aims to reach consumer audiences in the physical world, outside of their home environment. Include a range of different addressable formats and installations, including billboards, transit advertising, street furniture and place-based/in-store media



Connected Commerce

The deployment of marketing, merchandising and selling strategies that aim to unify consumer shopping experiences across physical and digital touchpoints. Brands typically orchestrate connected commerce efforts with an eye on providing shoppers with the tools and information needed to discover, engage and purchase seamlessly via an array of channels

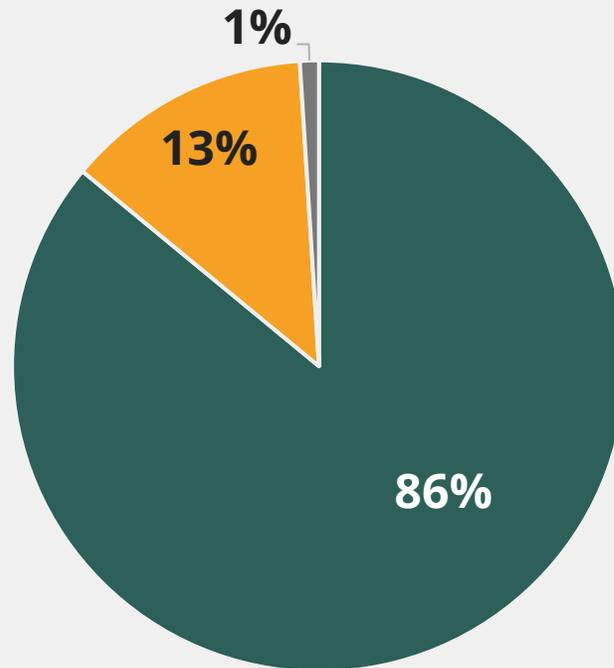
Marketers See Connected Commerce as a Strategic Priority, Aiming to Address Increasingly Fragmented Customer Journeys



Connected commerce represents a strategic priority for brands and retailers—who are looking to OOH media to play an increasingly central role in those efforts

To what extent have you focused, over the last two years, on better orchestrating the deployment of paid and owned marketing channels in support of an overarching “connected commerce” strategy?

(% of respondents)



Extremely focused: we believe aligning content, timing, channel selection and measurement is critical for optimizing our marketing and sales efforts

Somewhat focused: we believe aligning our paid and owned media efforts delivers benefits, but have not yet advanced a unified strategy for doing so

Don't know/not sure

“Brands are increasingly looking to connect all their touchpoints to drive sales outcomes. Out of home isn’t just an upper-funnel tactic anymore; it’s part of the broader strategy to orchestrate media that influences purchase behavior.”

—Senior Media Strategist,
OOH Media Owner

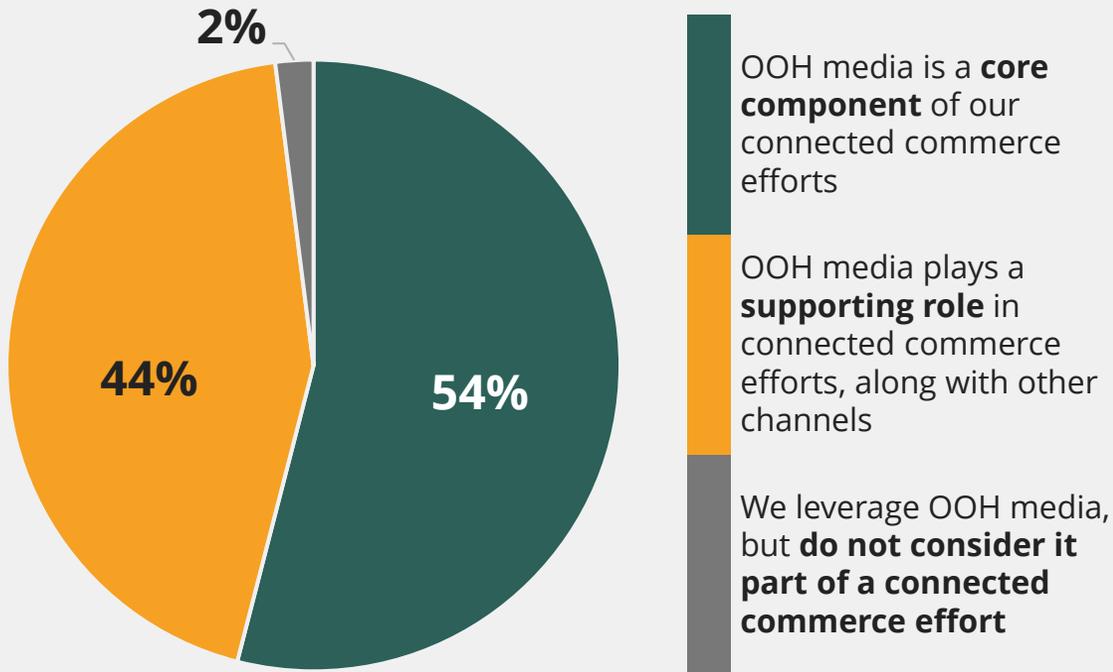
“A lot of retailers still think that the path to purchase is linear. But people are bouncing around a lot, and because of our lack of measurement, we don’t really have the ability to tell that story effectively. If we can connect those dots, it would be a game-changer for how brands think about the shopper journey.”

—Manager, Retail Media Group,
National Retailer

OOH Already Well Established as Component of “Connected” Efforts

Which of the following best describes how you currently incorporate OOH media, whether digital or traditional/printed, in your connected commerce efforts?

(% of respondents)



“We understand online and in-store, but anything in between, the whole rest of your day, that’s where digital out-of-home comes into play. It’s really about driving customers into the store so we can tie in in-store messaging. That space in between is huge and has been largely overlooked.”

—Director, Retail Media Operations,
National Retailer

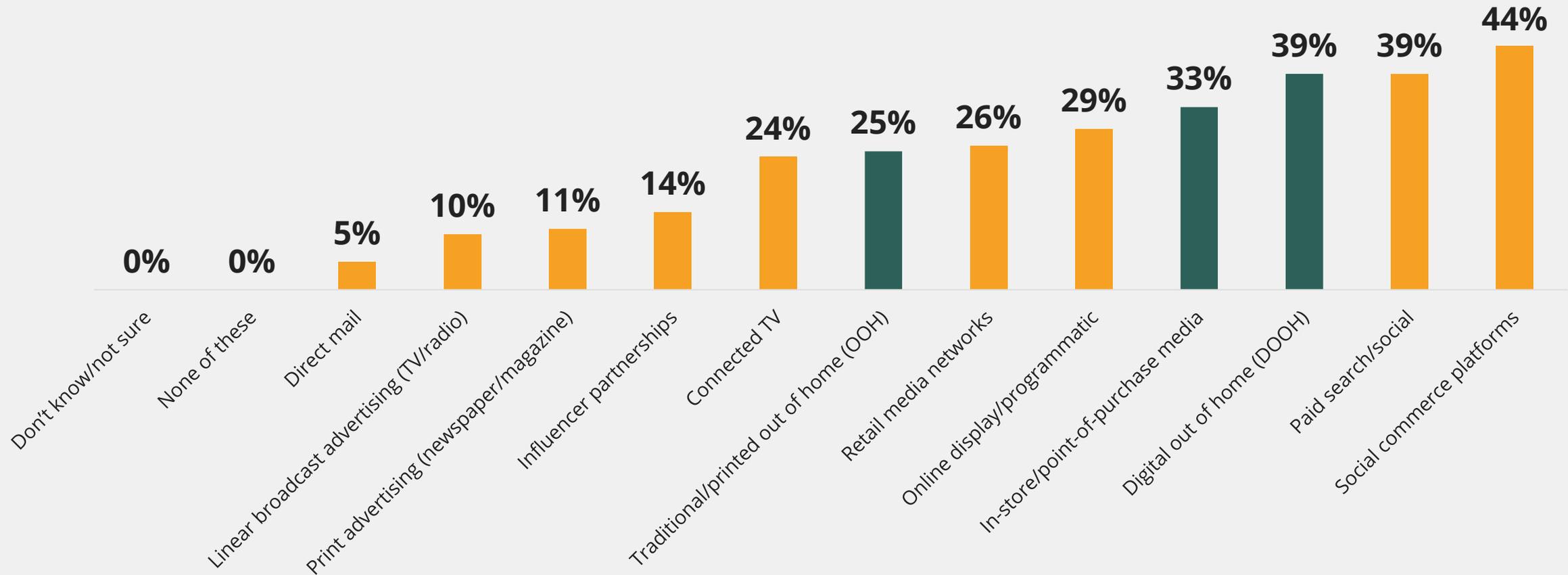
“There’s growing emphasis on orchestrating multiple channels. OOH is increasingly considered not just as standalone, but as part of a connected commerce strategy that can reach shoppers in proximity to retail locations.”

—Group Media Director,
Global Media Agency

DOOH, In-Store Media Among Channels Brands Rely On Most to Support “Connected” Aims

Which of the following paid/owned marketing channels do you consider most important in supporting your connected commerce efforts?

(% of respondents who selected among top three)



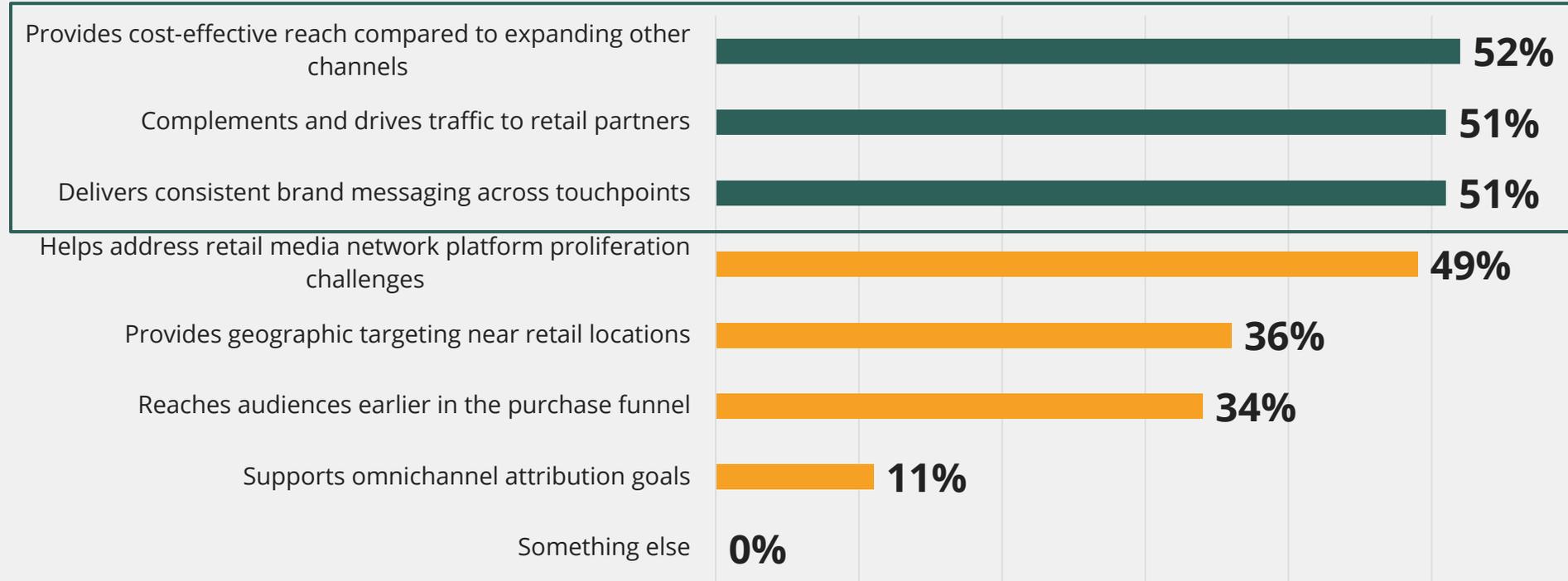
Practitioners Say They Rely on OOH to Deliver Cost-Effective Reach, Drive Retail Traffic and Reinforce Consistent Messaging



OOH delivers multi-dimensional value in support of connected commerce programs

What role(s) does OOH media most directly play in support of your connected commerce efforts?

(% of respondents who selected among top three)



“When used properly, OOH helps amplify other channels like social, search and in-store messaging. Its contribution is multi-faceted, affecting both awareness and engagement.”

—Marketing Lead, Digital OOH Platform

“OOH provides a different dimension of value. It’s not just impressions; it creates real-world context and credibility for campaigns, particularly when layered with digital or retail media.”

—Senior Vice President, Media Agency

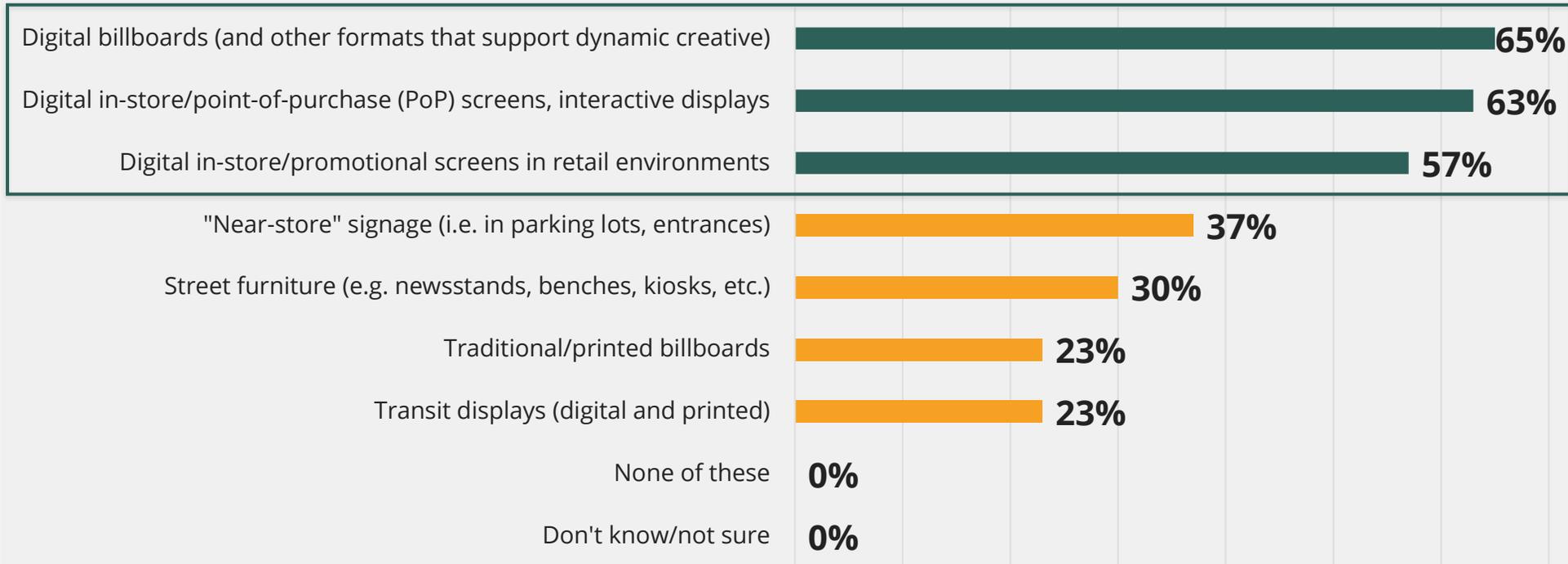
Brands Aiming for “Right Message, in Right Venue” View Digital OOH as Delivering Most Impactful Touchpoints



Digital formats dominate today's "connected" programs, but brands see a role for virtually all OOH media—with proximity as the key driver of performance

Which of the following OOH media formats do you think best support your connected commerce aims?

(% of respondents who selected among top three)



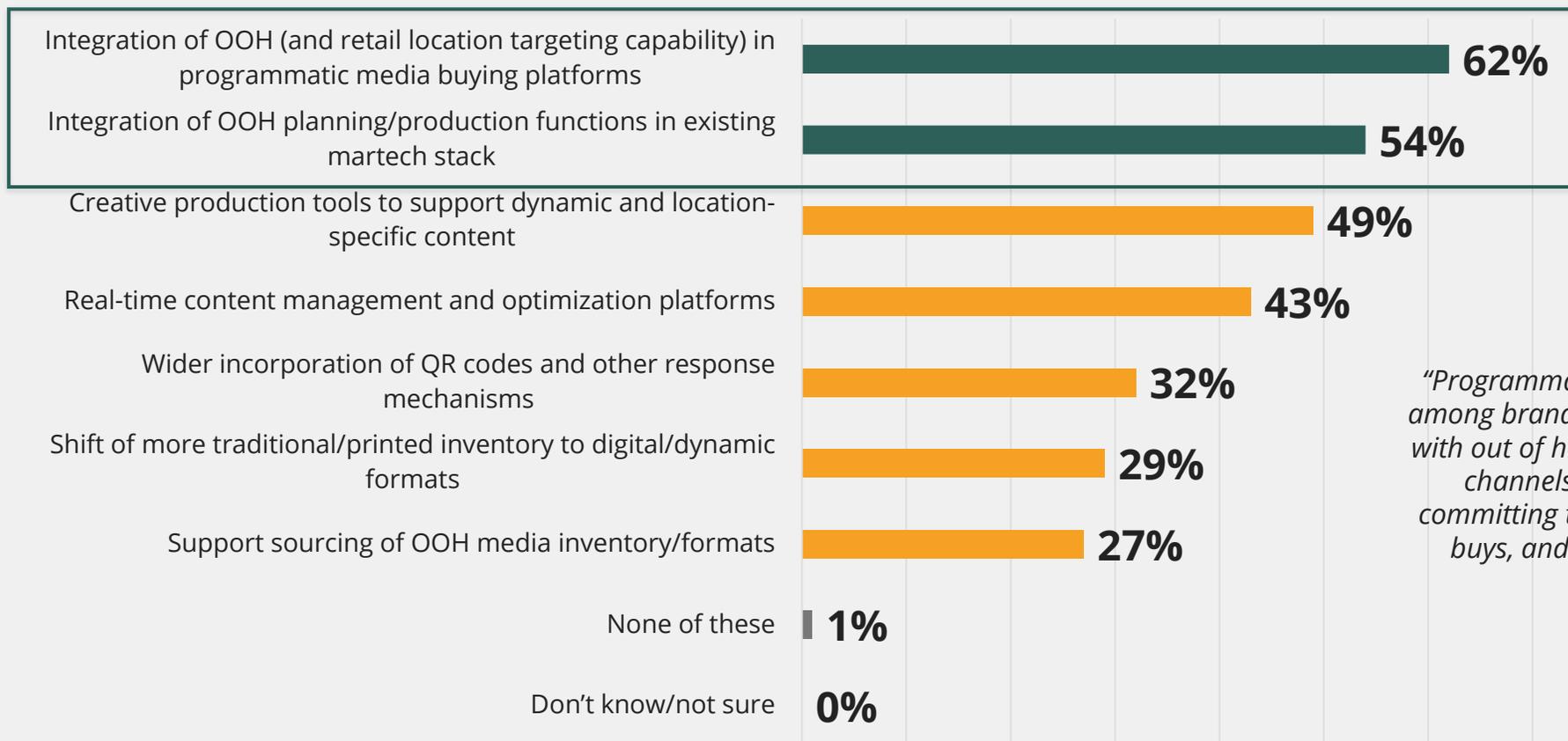
“Brands start with digital for connected commerce, but they quickly see that other formats—transit, building wraps, even static boards—play a meaningful role, especially when tied to local proximity.”

—Marketing Lead, Digital OOH Platform

Brands See Great Potential in Ability to Transact OOH Programmatically

Advances/investments in which of the following would best advance your efforts to capitalize on the unique formats associated with OOH media?

(% of respondents who selected among top three)



“Brands are gravitating toward digital [OOH] because it’s the easiest to buy via programmatic channels. Once they’re comfortable, there’s a chance to layer on static boards and other formats, but right now, programmatic makes it simple to execute and measure.”

—Senior Media Strategist,
OOH Media Owner

“Programmatic has certainly opened the door for curiosity among brands. We’re seeing more CPG clients experimenting with out of home, but almost always through programmatic channels. It allows them to test the channel without committing to the traditional complexities of national OOH buys, and it helps demonstrate incremental value in a measurable way.”

—Client Services Director,
National Retailer

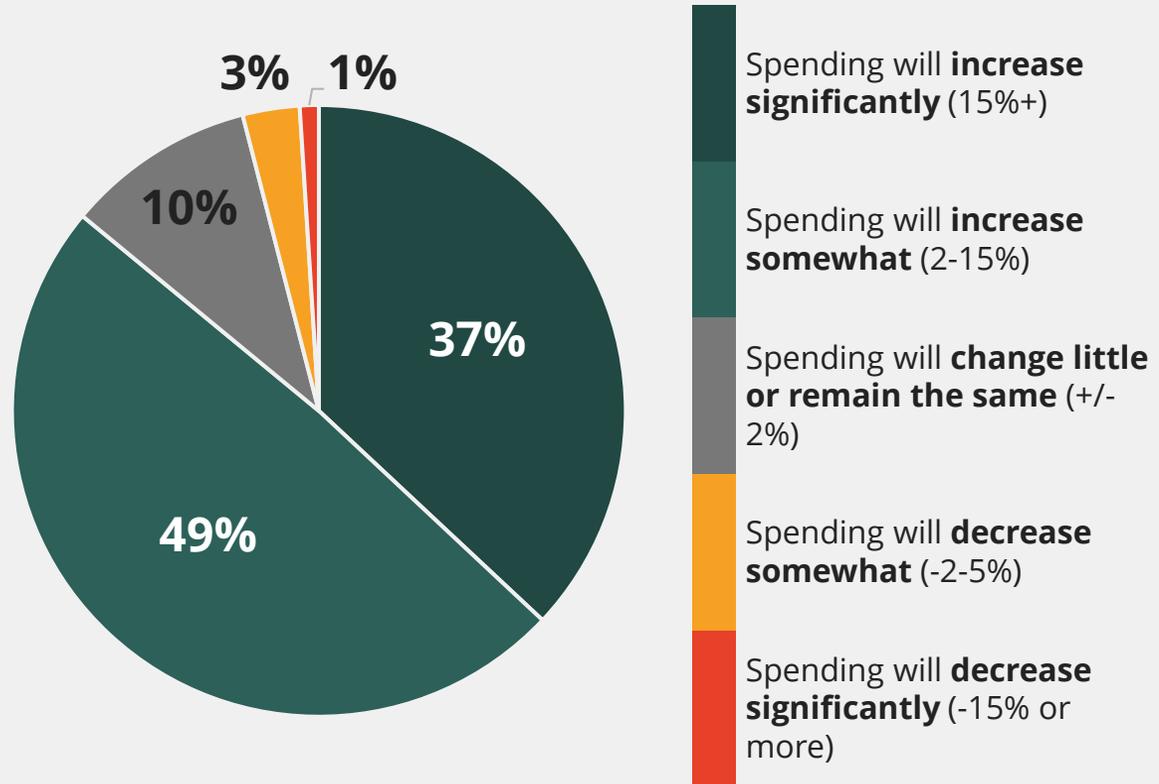
OOH Spending Rising; Brands Say Richer Insight into Incremental Lift Would Drive Even Higher Investment



A sizable majority of connected commerce marketers expect to grow their OOH investment, leveraging expected advances in measurement, formats and cross-channel integration

How do you expect your spending on OOH media (as a component of your connected commerce efforts) will evolve over the next two years?

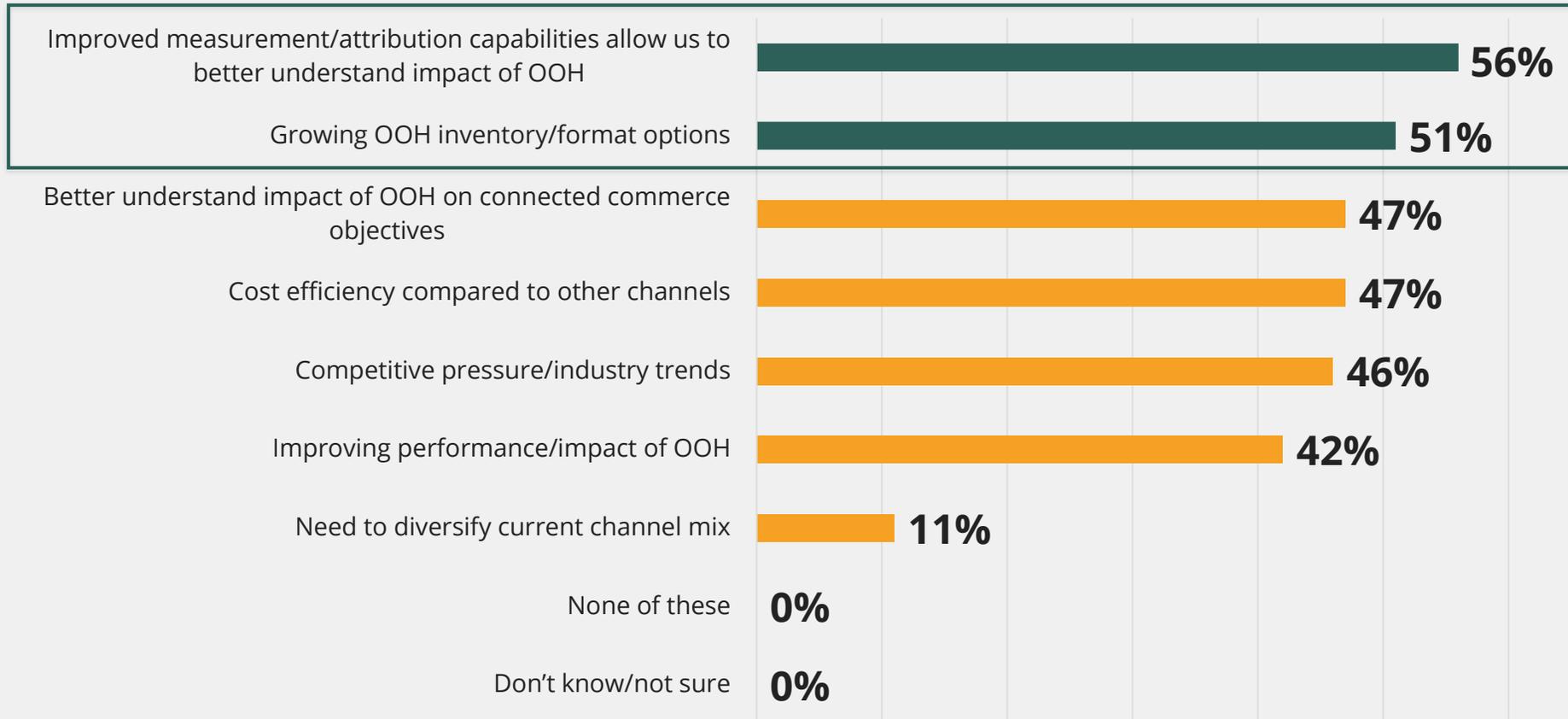
(% of respondents)



Improved Measurement, Growth of Addressable OOH Formats to Drive Greater OOH Investment

What factors will be most responsible for driving your likely increase in OOH spending?

(% of respondents who selected among top three)



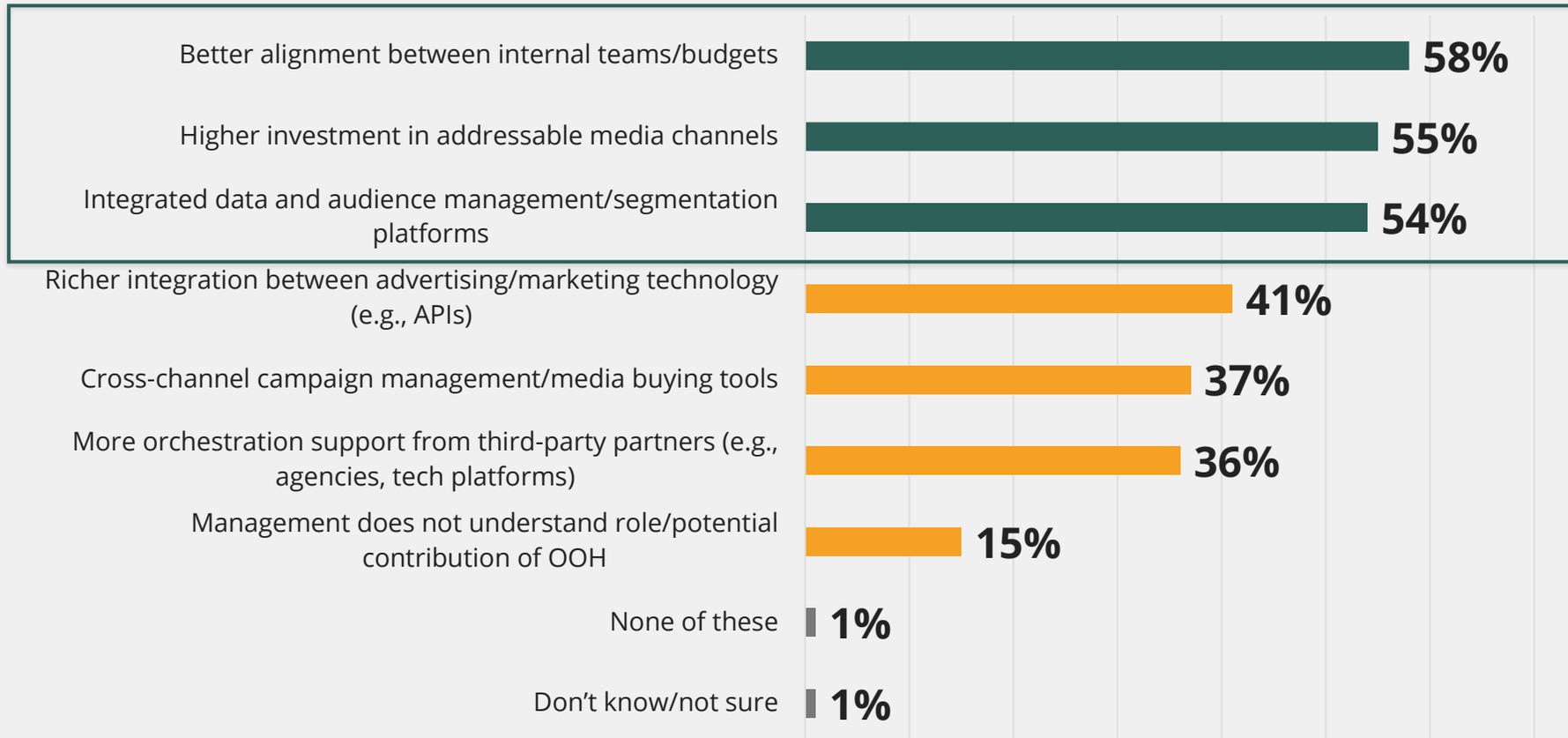
“We’ve seen brands start to allocate small budgets to digital OOH experiments, but many hesitate to scale because they don’t fully trust the measurement. There’s optimism that as reporting matures, and as multi-touch attribution and media mix modeling incorporate OOH more effectively, those same brands will increase their spend substantially.”

**—Senior Vice President,
Media Agency**

Brands Recognize *They're* Often the Barrier to Better OOH Deployment; Need to Optimize Resources, Strategies Across Internal Teams

What internal investments, initiatives or resources would most advance your efforts to orchestrate the deployment of OOH as part of your connected commerce strategies?

(% of respondents who selected among top three)



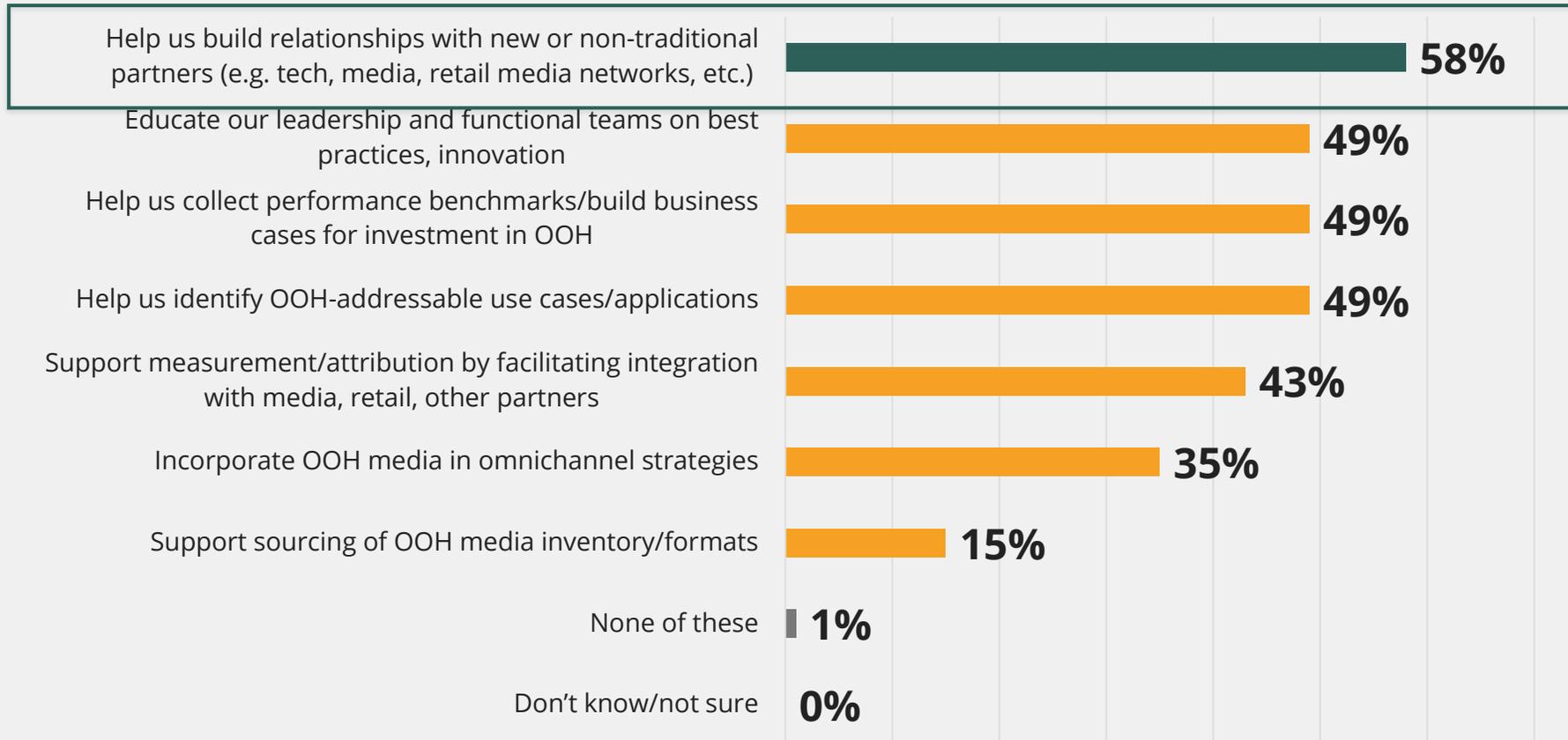
"[Our brand partners] want easier ways to buy, streamlined teams, clearer metrics, and proof that the campaigns drive real-world results. It's not enough to just place boards or screens, they need integrated solutions that tie directly to sales and customer behavior. And only then will budgets move from cautious experimentation to sustained allocation."

**—Client Services Director,
National Retailer**

Agencies, Media/Tech Partners Have Key Roles to Play in Facilitating Connected OOH

How could agencies, media providers and other third-party marketing partners best help you leverage OOH media in support of your connected commerce efforts?

(% of respondents who selected among top three)



“What brands need is simplicity and consistency. Platforms and partners should be making OOH easier to buy, easier to optimize and easier to report on—closer to how digital works today. If the industry can reduce friction and provide clearer, more unified reporting, it becomes much easier for agencies and brands to support OOH as a core channel rather than a specialty buy.”

**—Marketing Lead,
Digital OOH Platform**

Looking Ahead: Three Keys to Unlocking OOH's Future Potential

On billboards, at the retail point of sale and in all the venues where people meet to shop, do business and have fun, one truth is certain: OOH media is thriving.

It's thriving because it drives connection, inspires awareness and helps bring real-world spaces to life. But as consumers fixate ever more of their attention to personal devices that bridge their "on-the-go" and digital identities, it'll be critical for OOH to continue evolving in lockstep with other media that consumers see as informative, entertaining and worthwhile. Unlocking its unique power-of-proximity will thus demand that OOH's practitioners—brands, media owners, agencies, tech platforms and others—work together to tackle various transformational priorities over the coming years, particularly with respect to:

- **Measurement and attribution:** working toward universal standards to identify and quantify audience reach and impact
- **Addressability:** applying audience insights, dynamic content and unique formats to advance a connected commerce role for *all* OOH inventory, both "digital" and "traditional;" and
- **Programmatic integration:** establishing the mechanism for brands to transact OOH media through the same tools and automation platforms that they're increasingly using to engage other media core to their connected initiatives.

"Unlocking its unique power-of-proximity will thus demand that OOH's practitioners... work together to tackle various transformation priorities over the coming years"

Research Background & Methodology

What is this report?

A research briefing exploring how enterprise marketers and agency executives are incorporating out of home media into their connected commerce strategies—and how they expect those efforts to evolve in the years ahead

What is this research intended to do?

Help practitioners benchmark their own practices and provide perspective on the rapidly evolving role of OOH within connected commerce

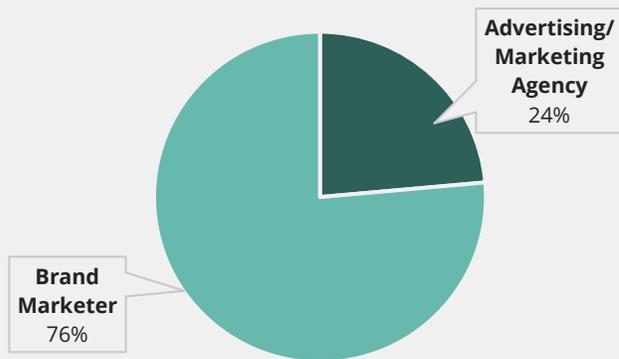
How were these findings compiled?

Through an online survey of **106 enterprise marketers and agency executives with responsibility for connected commerce programs** that touch diverse paid and owned media channels (potentially, but not necessarily, including OOH), as well as thought leader interviews with more than a dozen executives representing marketer brands, retailers, agencies and OOH service providers (with research initiated in November 2025 and concluded in January 2026)

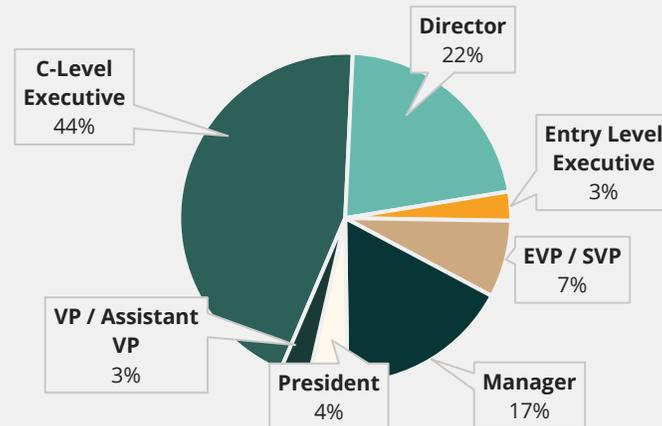
What were panelists asked?

Brand-side marketer respondents were asked to comment on their organization's experiences and plans while agency respondents were asked to comment given their experience serving one or more clients. (For simplicity, certain results have been aggregated and are represented in this report collectively)

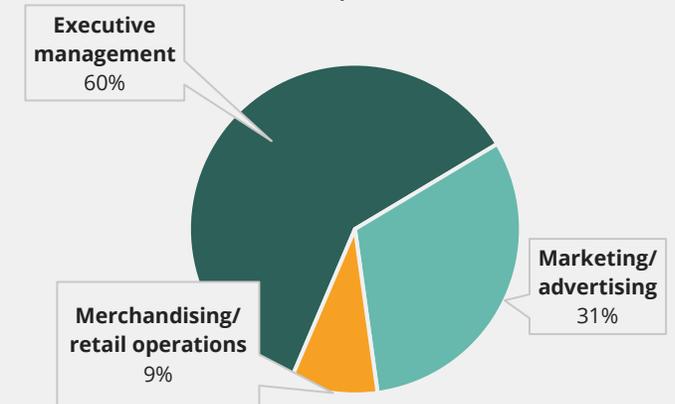
Survey Respondents:
Industry Breakdown



Survey Respondents:
Seniority/Business Title



Survey Respondents:
Role/Department



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