

KSA OOH And DOOH - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 100 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

KSA OOH And DOOH Market Analysis

The Saudi Arabia out-of-home advertising market is expected to grow from USD 0.96 billion in 2025 to USD 1.06 billion in 2026 and is forecast to reach USD 1.7 billion by 2031 at 9.98% CAGR over 2026-2031. Vision 2030's infrastructure build-out, from NEOM and The Line to the Riyadh Metro, is reshaping inventory supply while 5G roll-outs enable real-time programmatic bidding across thousands of screens. Digital formats already command a 54.73% slice of the Saudi Arabia out-of-home advertising market, and programmatic DOOH is advancing at 12.22% CAGR as advertisers pivot to AI-driven audience analytics and creative optimization. Transportation corridors capture 31.83% of spend thanks to 2,688 metro carriage screens and expanding airport networks, while retail environments retain the largest end-user budget share at 28.92%. Competitive intensity is moderate, with Al Arabia's SAR 10 billion alliance with SCAI signaling scope for further consolidation and technology-led differentiation.

KSA OOH And DOOH Market Trends and Insights

Ongoing Shift Toward Digital Advertising

Artificial-intelligence partnerships are accelerating the Saudi Arabia out-of-home advertising market's transition from static boards to intelligent, data-rich networks. Sky and Saudi Media rolled out an AI AdTech suite in January 2025 that segments audiences in real time and adapts creatives accordingly. A 2024 Panda-SCAI-Faden initiative deployed smart in-store screens capable of facial analytics and SKU-level content triggers. JCDecaux layered Qloo's cultural-intelligence engine onto its inventory and logged a

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

ten-fold ROI jump via geospatial targeting. Privacy safeguards under the PDPL bolster advertiser confidence, ensuring compliant first-party data use. Collectively, these moves deepen programmatic demand and lift the digital slice of the Saudi Arabia out-of-home advertising market.

Growing Development of Public Transport Networks

The Riyadh Metro's 2,688 high-definition screens illustrate how transit upgrades unlock premium impressions in captive-audience contexts. King Khalid International Airport, now under Al Arabia's exclusive ad contract, adds concourse LEDs and baggage-claim wraps that yield above-average dwell times. Highway operator SASCO is integrating DOOH-ready EV chargers that convert wait time into brand-engagement minutes. A USD 1.2 billion tower deal between PIF and stc in 2024 improves connectivity for in-vehicle and roadside assets. Predictable travel patterns allow time-of-day and route-based creatives, reinforcing transportation's 31.83% share of the Saudi Arabia out-of-home advertising market.

Measurement and Attribution Complexity

Advertisers still lack a single, uniform yardstick for impressions, undermining budget shifts from online display to Saudi Arabia out-of-home advertising market formats. Place Exchange's PerView taps 100 billion monthly mobile signals for deterministic exposure metrics, yet uptake remains uneven. Veridooh now verifies programmatic DOOH buys, but buyers want cross-network comparability to mirror IAB digital standards. Multilingual creatives add layers: performance for Arabic-only versus bilingual loops requires separate baselines. LUMOS Intelligence fuses geotagging and mobility datasets yet charges a premium that mid-tier vendors cannot absorb. Compliance with PDPL further narrows data inputs, diluting attribution granularity and restraining full-funnel measurement.

Other drivers and restraints analyzed in the detailed report include:

Vision 2030 Smart-City Mega Projects Accelerating DOOH Expansion of 5G and Fiber Enabling Programmatic DOOH High Capex and Maintenance Costs in Harsh Climate

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Digital formats seized 54.12% of the Saudi Arabia out-of-home advertising market share in 2025, underpinned by Vision 2030's digitization ethos. Within digital, programmatic is racing ahead at 12.05% CAGR as advertisers embrace AI-led creative swaps and bid-level geo-decisioning powered by 5G backbones. Static billboards persist in cost-sensitive suburban pockets but relinquish city-center dominance where screen density, data triggers, and performance analytics tip ROI in favor of digital.

Programmatic vendors court agencies with unified dashboards offering audience packages bundled by demographic, time band, and location. Al Arabia and SCAI's ten-year pact will shift 100% of Riyadh's city furniture to digital, an action that alone can lift the Saudi Arabia out-of-home advertising market size by USD 180 million between 2025 and 2030. As PDPL-compliant data pipes mature, digital impressions become as addressable as mobile display, sustaining the segment's premium CPMs.

The Saudi Arabia OOH and DOOH Market Report is Segmented by Type (Static (Traditional) OOH and Digital OOH (LED Screens)), Application (Billboard, Transportation (Transit), Street Furniture, and Other Place-Based Media), End User (Automotive, Retail and Consumer Goods, Healthcare, BFSI, and Other End Users). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Arabian Contracting Services Co. (AlArabia) JCDecaux SE Saudi Signs Media Co. Alan Media and Advertising Co. Alliance Media Holdings (Pty) Ltd Daktronics, Inc. Advertising Ways Company Ltd. Faden Media Advertising Agency Rotana Media Services (RMS) Hills Advertising LLC Clear Channel Outdoor Holdings, Inc. Lamar Advertising Company OUTFRONT Media Inc. Stroer SE and Co. KGaA Broadsign International, Ltd. Samsung Electronics Co., Ltd. (Display Division) LG Electronics Inc. (B2B Signage) Ocean Outdoor Limited Focus Media Information Technology Co., Ltd. Global Media Group Services Ltd.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Ongoing Shift Toward Digital Advertising
 - 4.2.2 Growing Development of Public Transport Networks
 - 4.2.3 Vision 2030 Smart-City Mega Projects Accelerating DOOH
 - 4.2.4 Expansion of 5G and Fiber Enabling Programmatic DOOH
 - 4.2.5 AI-Driven Audience Analytics Boosting Campaign ROI
 - 4.2.6 Rise of EV-Charging Hubs as New DOOH Inventory
- 4.3 Market Restraints
 - 4.3.1 Measurement and Attribution Complexity
 - 4.3.2 High Capex and Maintenance Costs in Harsh Climate
 - 4.3.3 Stringent Permit and Content Regulations
 - 4.3.4 Extreme-Heat Hardware Degradation Risk
- 4.4 Industry Value Chain Analysis
- 4.5 Regulatory Landscape
- 4.6 Impact of Macroeconomic Factors
- 4.7 Technological Outlook
- 4.8 Porter's Five Forces Analysis
 - 4.8.1 Bargaining Power of Suppliers
 - 4.8.2 Bargaining Power of Consumers
 - 4.8.3 Threat of New Entrants
 - 4.8.4 Competitive Rivalry
 - 4.8.5 Threat of Substitutes
- 4.9 Industry Ecosystem Analysis
- 4.10 Key Technological Innovations

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.10.1 Innovations to Assess Audience Measurement and Analytics
- 4.10.2 Indication on Available Units (Spaces) in the Country
- 4.10.3 Likelihood of Audience Engagement via Online Channels
- 4.10.4 Use of Digital Signage Screens for Advertisement
- 4.11 Key Case Studies of OOH and DOOH Advertisement Campaigns
- 4.12 Overall Positioning of OOH and DOOH vs Other Ad Formats

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

- 5.1 By Type
 - 5.1.1 Static (Traditional) OOH
 - 5.1.2 Digital OOH (LED Screens)
 - 5.1.2.1 Programmatic OOH
 - 5.1.2.2 Others
- 5.2 By Application
 - 5.2.1 Billboard
 - 5.2.2 Transportation (Transit)
 - 5.2.2.1 Airports
 - 5.2.2.2 Others (Buses, etc.)
 - 5.2.3 Street Furniture
 - 5.2.4 Other Place-based Media
- 5.3 By End User
 - 5.3.1 Automotive
 - 5.3.2 Retail and Consumer Goods
 - 5.3.3 Healthcare
 - 5.3.4 BFSI
 - 5.3.5 Other End Users

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves
- 6.3 Market Share Analysis
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)
 - 6.4.1 Arabian Contracting Services Co. (AlArabia)
 - 6.4.2 JCDecaux SE
 - 6.4.3 Saudi Signs Media Co.
 - 6.4.4 Alan Media and Advertising Co.
 - 6.4.5 Alliance Media Holdings (Pty) Ltd
 - 6.4.6 Daktronics, Inc.
 - 6.4.7 Advertising Ways Company Ltd.
 - 6.4.8 Faden Media Advertising Agency
 - 6.4.9 Rotana Media Services (RMS)
 - 6.4.10 Hills Advertising LLC
 - 6.4.11 Clear Channel Outdoor Holdings, Inc.
 - 6.4.12 Lamar Advertising Company
 - 6.4.13 OUTFRONT Media Inc.
 - 6.4.14 Stroer SE and Co. KGaA

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4.15 Broadsign International, Ltd.
- 6.4.16 Samsung Electronics Co., Ltd. (Display Division)
- 6.4.17 LG Electronics Inc. (B2B Signage)
- 6.4.18 Ocean Outdoor Limited
- 6.4.19 Focus Media Information Technology Co., Ltd.
- 6.4.20 Global Media Group Services Ltd.

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

7.1 White-space and Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

KSA OOH And DOOH - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 100 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-28"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

