



Vision for Growth

For Out of Home advertising



OUTSMART

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by Tim Lumb

The Out of Home (OOH) advertising sector stands as one of the most important, yet often underappreciated, components of the UK's social infrastructure. Bus shelters, free telephony & Wi-Fi, community messaging and public defibrillators are all valued elements of the high street landscape. These local benefits are funded by advertising without additional cost to the taxpayer.

Issues such as unsustainably high business rates for social infrastructure combined with a fragmented policy environment pose hurdles to unlocking the full potential for OOH advertising to invest in communities and drive economic growth.

Looking to the future, our vision for OOH is one of continued innovation, collaboration, and growth. As digital technology evolves and sustainability remains at the forefront, we aim to ensure that OOH continues to enhance its role as a contributor to public infrastructure.

By addressing regulatory challenges and promoting regeneration through OOH investment, we believe this sector can play an even greater role in shaping the UK's economic and social fabric.

This Vision for Growth outlines the path forward, providing a roadmap for how we can work together with the Government, industry partners, and communities to support the growth of OOH. It's time to fully recognise the value OOH brings to the UK and unlock its future potential.

"You can unlock the future potential of the Out of Home sector"



A handwritten signature in black ink, appearing to read 'TLumb'.

Tim Lumb
Director of Outsmart

What is the Out of Home advertising sector?

Put simply, the Out of Home (OOH) advertising sector refers to any public adverts viewed outside of the home environment. Typically, these are displayed on classic sheet posters or digital screens.

Each week, 97% of the public see an advert in an outdoor environment. It's the most dynamic and inclusive advertising medium available.

From shopping trips, meeting friends, catching a flight, train or bus, to commuting. Every day, OOH adverts are viewed by millions of people.

Despite its ubiquity, few recognise OOH's contribution to social infrastructure and public services.



SECTION 1

As a constantly evolving medium, OOH has transformed significantly over time. While classic sheet posters are the backbone of OOH, digital advertising now represents a sizeable and growing part of the industry.

Going back over the years, OOH has been relied upon and trusted time and time again by both advertisers and public messaging from councils and government. Whilst the sector continues to grow with a record

revenue of £1.4bn in 2024, a sizeable 7.7% increase compared to the year before, there is huge potential for further expansion that is currently being constrained.

OOH adverts catch the eye at a moment's convenience, offering advertising in more inclusive environments that are less intrusive in nature and allow for more organic and meaningful consideration.



Whilst the sector continues to grow with a record £1.4bn revenue in 2024, representing +7.7% year on year growth, there is huge potential for further expansion that is currently being constrained.

We define OOH in four categories:

Roadside

Adverts on bus shelters, billboards/screens on main thoroughfares



Transport

Adverts on buses, rail stations, underground, metro and airports



Retail

Adverts in shopping centres and supermarkets



Everything Else

Adverts in gyms, pubs, surgeries and universities



What is Outsmart?

Outsmart is the trade body for the OOH sector in the UK, representing OOH media owners with the majority being SMEs. On the whole, our members collectively represent over 90% of the industry's revenue, and operate some of the country's most iconic advertising spaces such as the Piccadilly Lights.

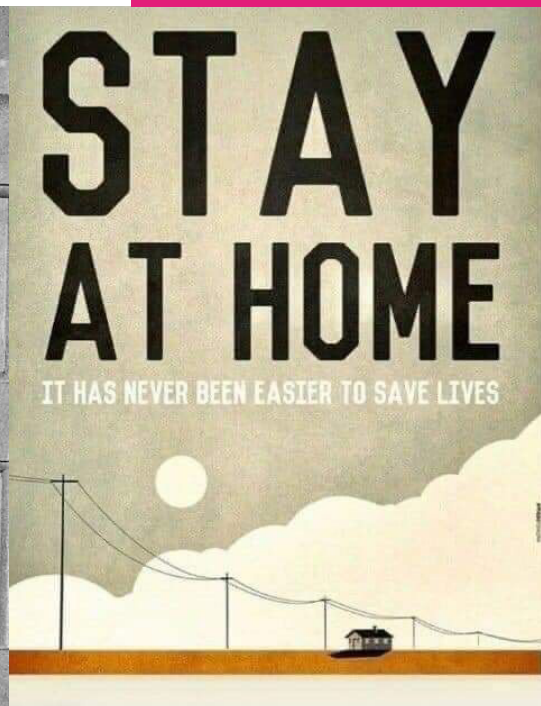
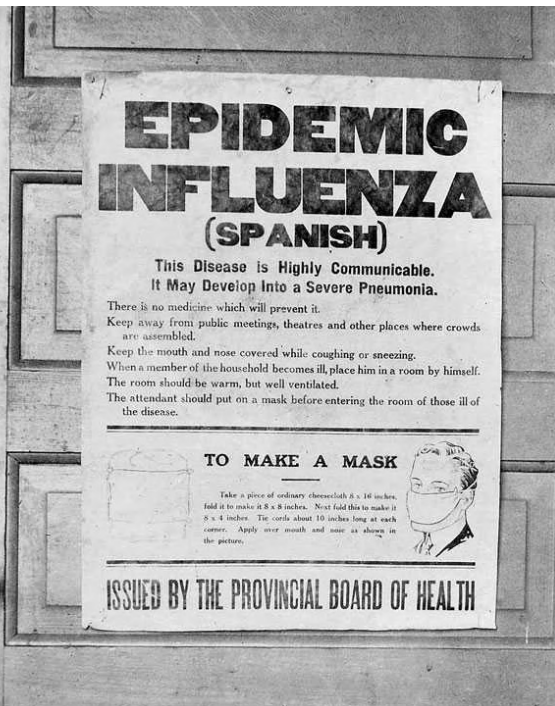
Across **55** members, Outsmart's guiding role is to represent the collective view and improve the understanding of our sector, its societal value, and economic potential.

Outsmart's council members are:



Journey to date for OOH.

1910s to present



Benefits of OOH.

Supporting social causes



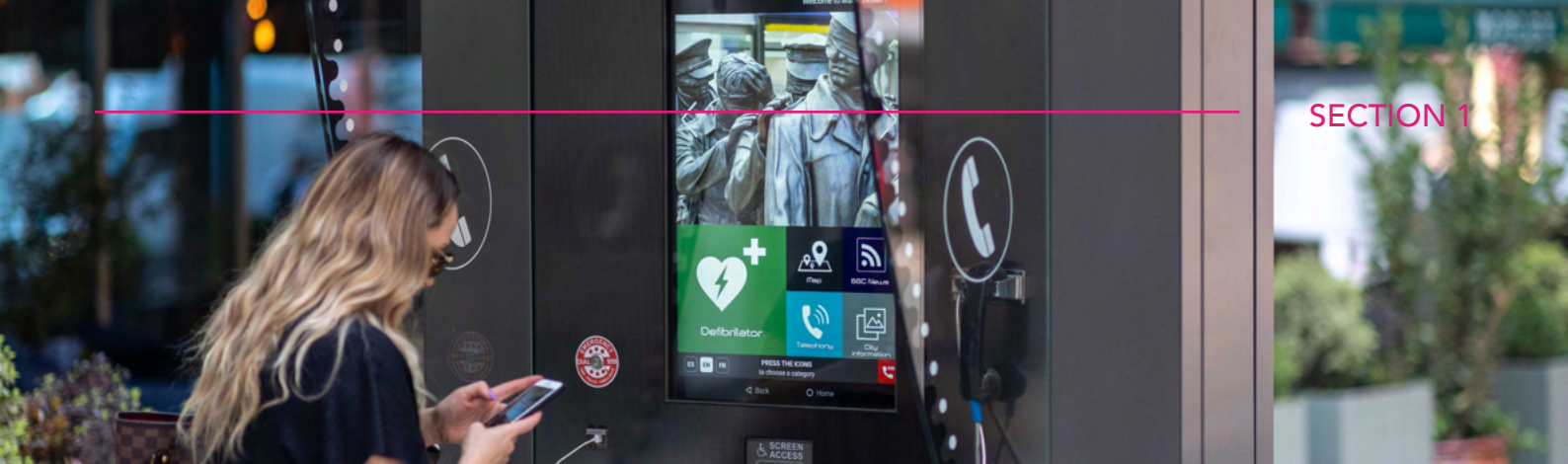
Outsmart's members have played an important role in shaping the fabric of UK society for decades, not just through investing in community social infrastructure but also by donating important advertising space for charities such as Missing People, The King's Trust, Samaritans, BBC Children in Need, and helping to underpin important public messaging – including the death of Queen Elizabeth II. During the pandemic, our media owners also donated free advertising space to support vital government safety messaging, charities and struggling local businesses.

Cycle of economic reinvestment



The nature of OOH allows for significant reinvestment, with up to 40% of the OOH advertising revenue being reinvested back into the UK economy, providing jobs and improving social infrastructure. Principally, this reinvestment is focused on the installation, renewal, cleaning, and maintenance of social infrastructure used by the public daily, such as bus shelters and defibrillators. This investment is equally beneficial for the local authorities charged with providing and funding these assets in the absence of partnerships with OOH media owners.





Community awareness

1. OOH is a human-intensive industry and one of the strongest self-regulating forms of advertising. Before each advert is shown, it must go through a rigorous assessment to ensure it meets the high standards expected of our industry. This is evidenced by the fact that while 97% of the public see an OOH advert each week, it accounts for a disproportionately low number of ASA complaints – just 2%, in contrast with TV (52%) and online (34%).



2. All Outsmart members implement a restriction on products like HFSS, alcohol, lotteries, gambling and vapes within 100 metres of a school boundary. This form of self-regulation across numerous large industries is entirely voluntary, and there is no requirement within the established advertising codes to undertake this.

3. The ASA itself is funded by advertisers and does not receive any Government funding, so is free of taxpayer involvement. The ASA is a rare example of an industry paying for its own regulator and has checks and balances in place to ensure its independence as an effective regulator.

Sustainable advertising

1. Over time, OOH has successfully limited its carbon footprint to the extent that it now has the lowest carbon emissions of any advertising channel. OOH represents 3.3% of the UK's total advertising power consumption, and just 0.067% of the country's total electricity usage. This equates to less than 3.5% of advertising's carbon footprint, lower than its share of all advertising spend (3.8%) according to research commissioned by Outsmart and carried out by KPMG.



2. The sector has made emissions reduction commitments across scopes 1, 2 and 3 to embed sustainability across all aspects of its operations - from using 100% renewable energy to running all-electric fleets, to voluntarily dimming the luminosity of screens in response to daytime natural light while activating screen downtimes at night. In recognition of the environment, over 240 living roofs have been installed on bus shelters using recycled materials. These roofs not only collect waste rainwater, but also include state-of-the-art green technology such as air quality monitoring systems and solar panels.

240+
LIVING ROOFS
INSTALLED BY

 Clear Channel



Case Study - Living Roofs

The UK has lost 97% of its flower-rich grasslands since the 1930s, and now just 1% of land is covered with meadows and other species-rich grasslands. If this trend continues, it has been predicted that 40-70% of species could go extinct. Following initial success in the Netherlands, Outsmart's council member Clear Channel UK has now installed over 240 Living Roofs – known as Bee Bus Stops – on bus shelters across 25 towns and cities in the UK. As an extremely popular asset for the public, these shelters help to restore habitats, improve air quality and support placemaking in often sterile urban environments. The ambition is to roll these out to 1,000 sites across the UK.



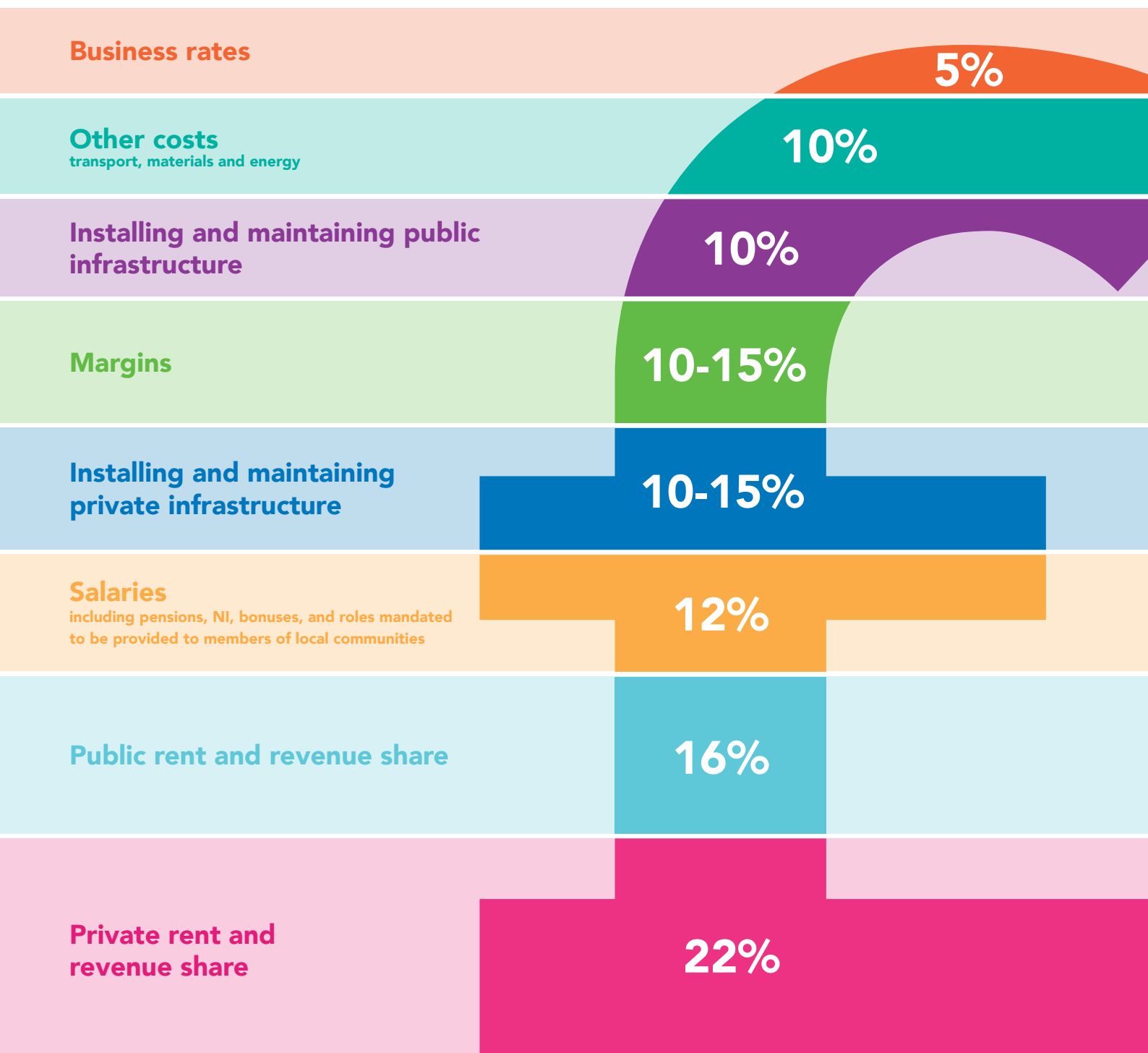
Case Study - Defibrillators

JCDecaux, in partnership with the Community Heartbeat Trust, are proud to have installed and maintained over 300 easy-to-use publicly-accessible defibrillators across 16 cities in the UK. If someone enters cardiac arrest, there's a 37% chance of saving their life if they are within a 100 metre radius of a defibrillator. Funded completely by digital advertising, these defibrillators have already been used over 500 times.

JCDecaux

For every £1...

On average, our industry reinvests 40% of revenue each year through taxes, investment in public services, communities and infrastructure. In 2021, this also included £1.7m in charitable donations and £27m in discounted media space.

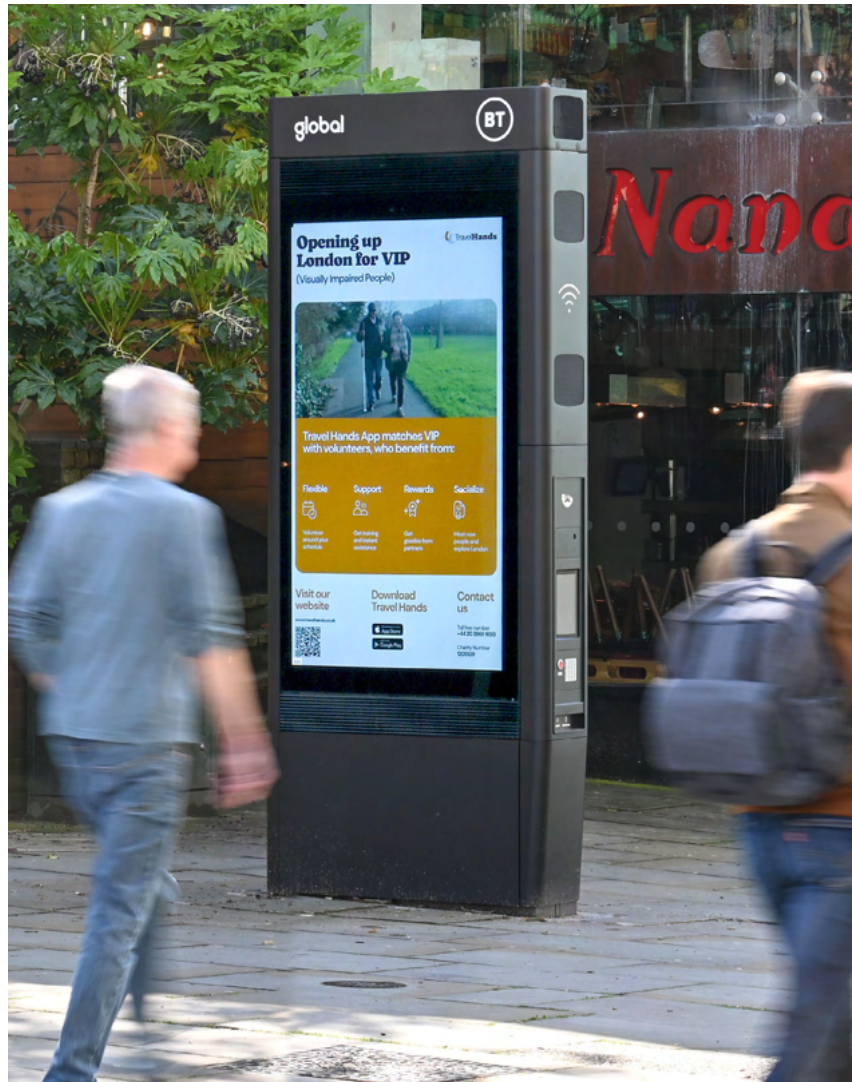


Case Study - Street Hubs



Global and BT have partnered up to transform 2,000 BT payphones and kiosks into BT Street Hubs around the UK. Street hubs enhance social infrastructure by providing free public Wi-Fi, free calls to any UK landline, mobile or emergency services, and real-time local information. Features such as wheelchair-friendly touchscreens, talkback, and hearing loops ensure accessibility for all.

BT Street Hubs have been instrumental in supporting rough sleepers and vulnerable individuals. Partnerships with charities like StreetLink and End Youth Homelessness provide direct access to support services and real-time assistance.



Case Study - Security



The role and use of large format and internal digital advertising screens as a live public information channel in the event of an emergency has been discussed between Ocean Outdoor and New Scotland Yard. Ocean has a mechanism to switch its OOH network to broadcast emergency messages in partnership with the Police and other authorities to help safeguard the public and responsibly divert them away from areas and incidents where they might be at risk. Other OOH networks at key transport hubs and some council operated estates have similar protocols. This is an area for future industry and government partnership.

Ensuring long-term growth for the OOH industry.

The OOH advertising industry has been an integral part of the UK advertising sector and is the oldest advertising medium, providing jobs, investing in social infrastructure, and significantly boosting the country's economy.

As one of the most effective self-regulating industries, OOH operates with limited intervention at the national level beyond the statutory ASA advertising codes that regulate how businesses can advertise. More broadly, advertising as a policy area sits across several governmental departments and in OOH's case is administered through a patchwork of local authorities.

This environment has created a significant gap in understanding when it comes to the OOH sector, its size, scale, value, and – most importantly – the direction of travel for future success, with the sector's recent growth placing it among the fastest-growing industries in the country.



National OOH Advertising Strategy

The OOH industry faces several challenges in an increasingly complex operating space, including, most notably, restrictions on the content our members can display.

We make a key economic and social contribution, and we provide tangible outcomes benefitting jobs and placemaking across the country, particularly in relation to our high streets where we build and maintain thousands of social infrastructure sites every year.

As with any other key growth sector, OOH advertising needs championing by the Government, acknowledging its role in realising the Government's ambition to create jobs, provide investment, and increase social value in local communities.

This publication – A Vision for Growth – seeks to inform the creation of a Government-led OOH Advertising Growth Strategy.

As part of our Vision, there are two major opportunities for the Government to directly intervene to create conditions for economic growth as a benefit of OOH:

Simplifying the funding model

Reduce

reduce administrative burdens

Remove

remove business rates on social infrastructure

Reinvest

use savings from the removal of rates to reinvest revenue back into social infrastructure





Our own findings have previously revealed that OOH has contributed £1.1bn towards public finances through business rates and rent over the last 14 years. This is a significant source of income for local authorities in helping to build and maintain public infrastructure, along with supporting public services, communities and employees.

OOH media owners pay unsustainably high rates across large estates of low rateable value sites which provide a public service – such as bus shelters and defibrillators – while at the same time, local authorities and public bodies such as the Valuation Office Agency and HM Treasury face an extremely high administrative cost to maintain business rates. This is particularly the case given often outdated methods of collection are used, for example, paperwork is still favoured over digitisation. This has the effect of reducing optimal investment levels in social infrastructure, leaving OOH media owners struggling to afford frequent rates revaluations and increases.

Given the administrative costs of levying business rates on these beneficial public assets, the associated income for local authorities is essentially wiped out, preventing media owners from investing more in the community.



OOH has contributed
£1.1bn

to support public services,
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employees in the last 14 years.

While business rates are inefficient across the board, they are particularly so for social infrastructure. The high volume of low rateable value sites creates a colossal amount of paperwork. Removing business rates on social infrastructure will help to ease the administrative headaches faced by local authorities, while ensuring that sites which provide public benefits can be better supported and funded by media owners.

Removing business rates on these assets would allow local authority contracts to be based on simpler rent agreements, increasing direct income to local authorities and unlocking more money for growth in the community.

Long-term certainty and the acceleration of express planning consent.

As a form of physical infrastructure, OOH advertising is governed by a set of planning rules controlled and regulated by English local planning authorities (LPAs) that grant express advertising consent based upon an assessment of impact on visual amenity and public safety.

LPAs consider thousands of applications submitted by media owners, many of which are Outsmart members, every year, while also overseeing the regulation and enforcement of existing advertisement consents. Images and content are regulated separately by the Advertising Standards Authority.

In our experience, approval for OOH sites has become an increasingly slow and burdensome process, even for simple and uncomplicated applications.



Certainty

extending the express planning consent period to ten years

Acceleration

applying a system of deemed condition discharge to speed up advertising consents

In most cases, express planning consent is granted for a period of five years. After this five-year period has expired, an advertisement can continue to be displayed with deemed consent and without the need to submit another application to the LPA. This is not absolute, however, and an LPA may choose to serve a discontinuance notice asking for the advertisement to be removed.

By their nature, applications for advertising consent are less complex but they can still be subject to significant delay as LPAs struggle with a considerable backlog in applications due to funding squeezes and overstretched resources.

An LPA has two months to approve or reject an application for planning consent. After two months, our members can appeal to the Planning Inspectorate if they are still awaiting a decision. Even then, what should be a simple appeal process is taking around 10–12-months which leaves applicants with little choice but to wait for an LPA to make a decision in the first instance.

However, a procedure called deemed condition discharge helps accelerate the review of conditions on planning consent. After two months, applicants can submit a deemed discharge notice to the LPA, forcing a decision. The condition is then either approved or removed.

To fast-track applications, we call for a similar discharge procedure applied to advertising consent applications. This backstop would prevent prolonged delays, making the process quicker and more efficient, while easing the burden on LPAs handling these straightforward applications.

To ensure the sector benefits from greater certainty, we ask that planning legislation is introduced to amend the express consent period to 10 years rather than the current five years.

The express planning consent period is of huge importance given our sector relies on long-term planning in order to design, build and deliver advertising sites viewed by hundreds of thousands of people every day.

Most sites remain in place well beyond their initial consent period, with just a handful receiving discontinuance notices from LPAs. In practice, these sites function as semi-permanent infrastructure but risk having consent withdrawn at any time.

To ensure the sector benefits from greater certainty, we call for a similar discharge procedure applied to advertising consent applications, and to amend the express consent period to 10 years rather than the current five years.



The call to action.

The time for you to support is now.

Without support, communities risk losing vitally important social infrastructure crucial to supporting those who need it the most.

You can help.

for more information contact Tim Lumb at info@outsmart.org.uk.

global

Guy's Cancer Charity

Ben, my surgeon, and the midwives were really fighting my corner. I didn't feel like I was alone.

Rachel and Phoenix

Help us support advances in cancer care.

Scan today to find out more.



Or visit guycancercharity.org.uk/rachel

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