BIA · OCTOBER 2026

Holiday Retail OOH



The November and December local advertising opportunity for OOH and DOOH sellers, across five retail categories.

$273.0M
2026 retail OOH + DOOH

~26%
already digital (DOOH)

Clothing · Department Stores · Discount Department Stores · Home Centers · Warehouse Clubs & Supercenters

THE OOH & DOOH OPPORTUNITY

$273M in holiday retail out of home, a quarter of it digital

$273.0M

Combined OOH + DOOH across five retail categories

~26%

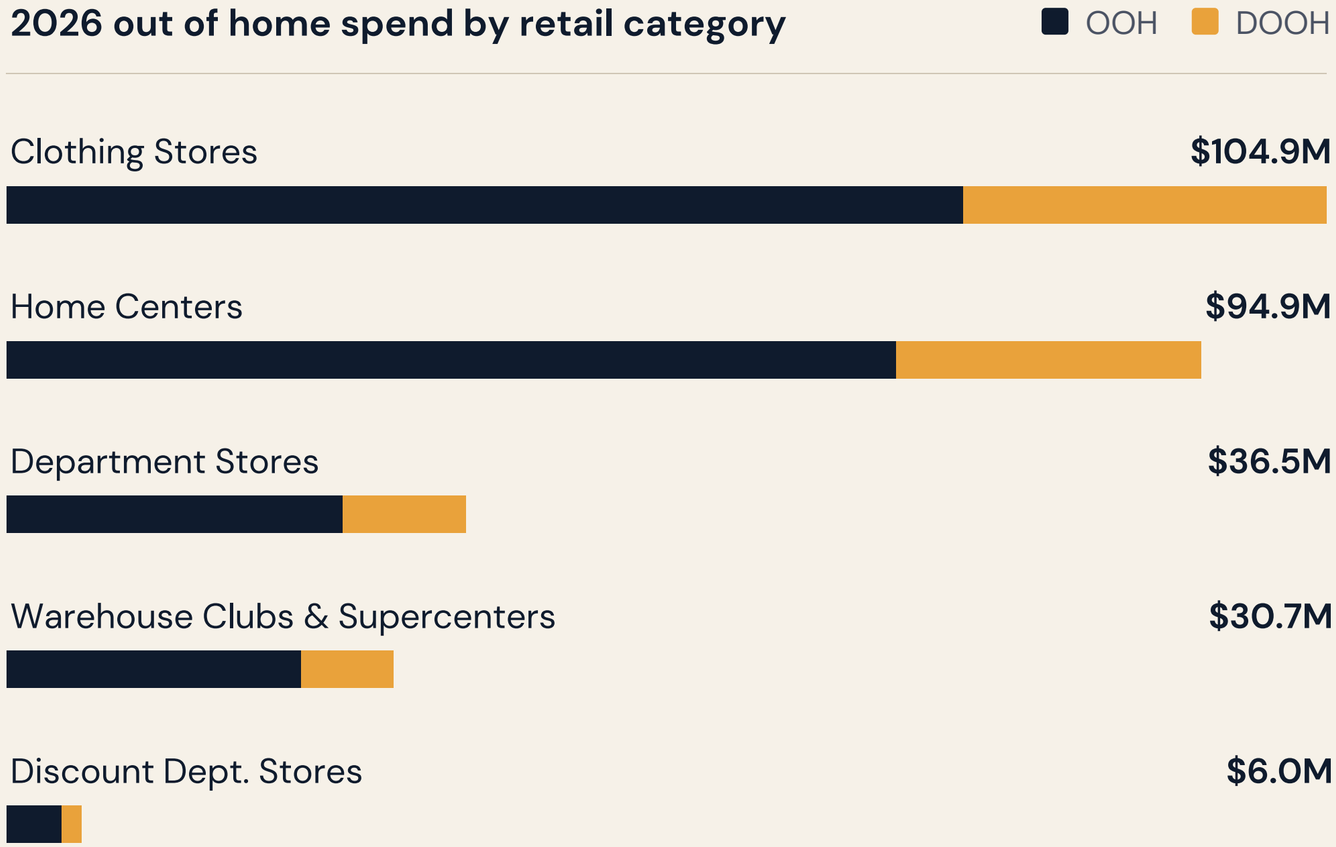
DOOH share of retail OOH, and climbing

$201.3M

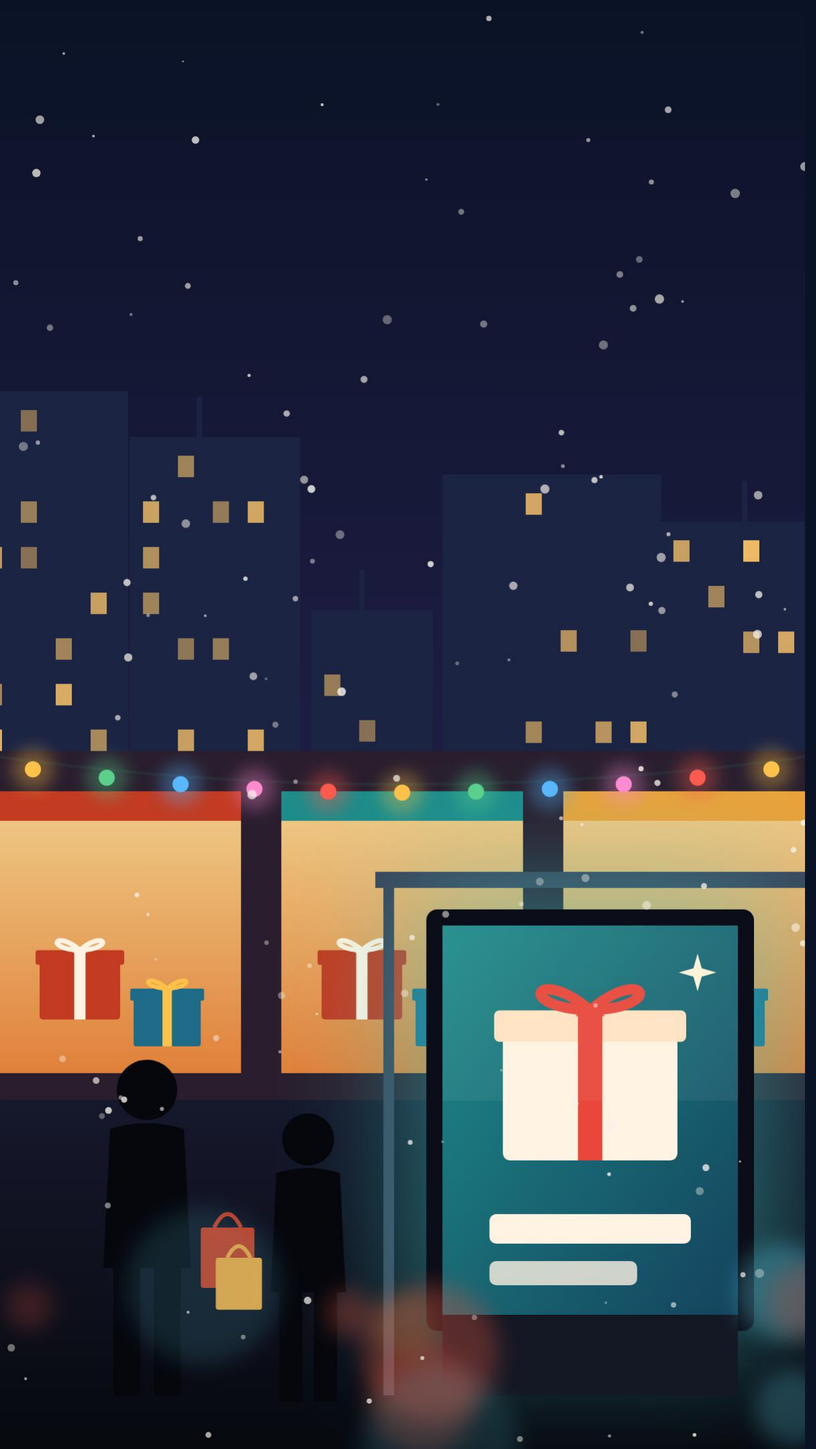
OOH spend across the five categories

$71.7M

DOOH spend across the five categories



Source: BIA U.S. Local Advertising Forecast, updated September 2026. Numbers rounded; OOH and DOOH shares BIA derived.



WHY THE SEASON FAVORS OOH

A long season and a shopper headed to the store

58%

A long season favors frequency

of shoppers plan to start earlier than last year; 34% begin in October. A season that long rewards OOH's steady, unskippable presence.

57%

Stores still win the gift

expect to buy gifts in a physical store (62% when buying for kids). OOH reaches them in the last mile, while the decision is still open.

BIA TIP

Lead with the path to purchase: you reach the shopper between the budget and the checkout. Use DOOH to turn static creative into dated offers that move with Black Friday, the last shipping day and the final in-store week.

Sources: Tinuiti, 2026 Holiday Shopping Trends; Mastercard Economics Institute; Inmar Intelligence.



BIA TIP FOR SELLERS

Clothing is the gift the whole market is shopping for. Sell malls, transit and street level near shopping districts for reach, and layer DOOH for dated offers as the list narrows toward Christmas.

RETAIL CATEGORY 1 OF 5

Clothing Stores

2026 ad spend
$3.51B
vs $3.34B in 2025

YoY growth
+4.9%
2025 to 2026

OOH 2026
$76.1M
2.2% of category

DOOH 2026
$28.8M
~27% of its OOH

Where OOH ranks: channels #5–12

2026 spend, $M · top 4: Direct Mail, PC, Mobile, Radio

5	Newspapers Digital	$130.9
6	Newspapers Print	$110.9
7	**OOH**	**$76.1**
8	Email	$73.4
9	TV OTA	$62.2
10	Radio Digital	$52.2
11	CTV/OTT	$34.5
12	**DOOH**	**$28.8**

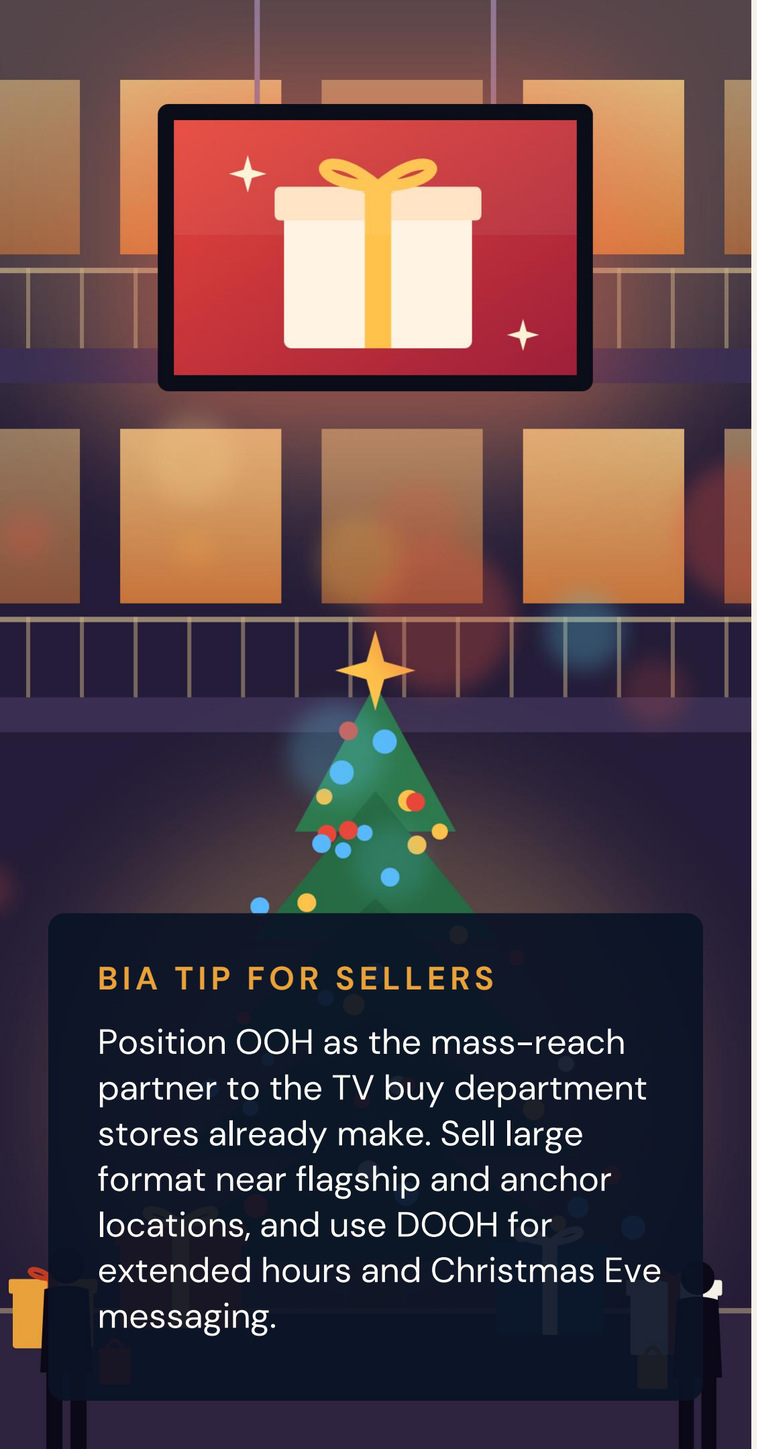
Where OOH sits

The largest retail OOH budget in this report, ranked #7 of 17 channels, ahead of TV OTA.

62%

of holiday shoppers plan to give clothing, ahead of gift cards (55%) and toys (41%).

Source: BIA U.S. Local Advertising Forecast, Sept. 2026. Trends: Tinuiti; Mastercard Economics Institute.



BIA TIP FOR SELLERS

Position OOH as the mass-reach partner to the TV buy department stores already make. Sell large format near flagship and anchor locations, and use DOOH for extended hours and Christmas Eve messaging.

RETAIL CATEGORY 2 OF 5

Department Stores

2026 ad spend	YoY growth	OOH 2026	DOOH 2026
$1.31B	**+3.8%**	**$26.7M**	**$9.8M**
vs $1.26B in 2025	2025 to 2026	2.0% of category	~27% of its OOH

Where OOH ranks: channels #5–12

2026 spend, $M · top 4: Direct Mail, PC, Mobile, TV

5	Radio OTA	$69.9
6	Newspapers Digital	$44.7
7	Newspapers Print	$37.9
8	**OOH**	**$26.7**
9	Email	$25.7
10	Radio Digital	$18.0
11	CTV/OTT	$13.9
12	**DOOH**	**$9.8**

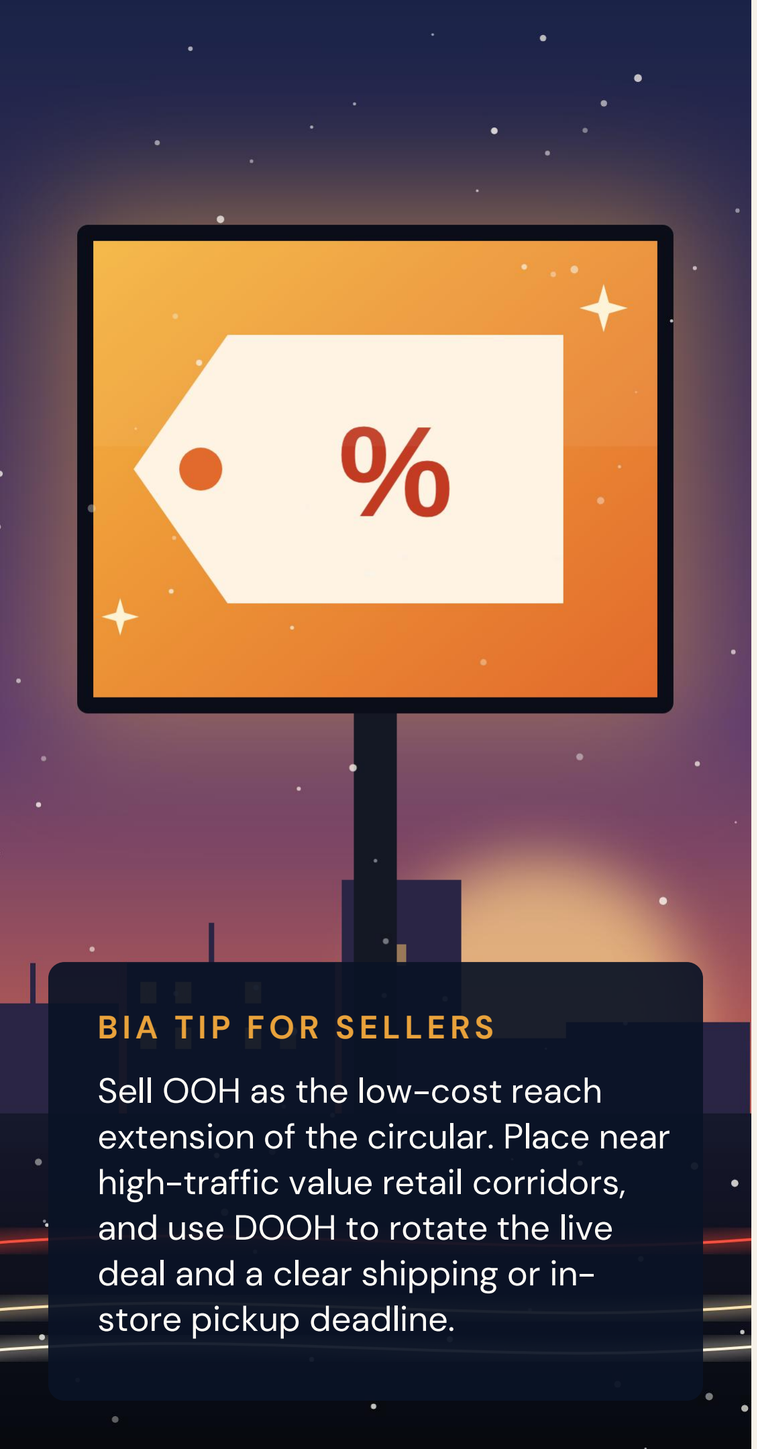
Premium moments, premium screens

Department stores lean on broadcast TV. OOH carries that premium message to the street and mall.

35%+

of in-store jewelry, handbag, cosmetics and department store spend landed in the final week.

Source: BIA U.S. Local Advertising Forecast, Sept. 2026. Trends: Mastercard Economics Institute (2025 card data).



RETAIL CATEGORY 3 OF 5

Discount Department Stores

2026 ad spend
$210.7M
vs $200.1M in 2025

YoY growth
+5.3%
2025 to 2026

OOH 2026
$4.4M
2.1% of category

DOOH 2026
$1.6M
~27% of its OOH

Where OOH ranks: channels #6–13

2026 spend, $M · #1 is Direct Mail at $79.5

6	TV OTA	$6.8
7	Newspapers Print	$6.5
8	**OOH**	**$4.4**
9	Email	$4.4
10	Radio Digital	$3.1
11	CTV/OTT	$3.1
12	TV Digital	$1.8
13	**DOOH**	**$1.6**

Value at the last mile

Affordability is the message. OOH matches Email and outspends CTV/OTT, cable and TV digital.

30%

of shoppers rank affordability as a gift's top trait, vs. 13% for premium quality.

BIA TIP FOR SELLERS

Sell OOH as the low-cost reach extension of the circular. Place near high-traffic value retail corridors, and use DOOH to rotate the live deal and a clear shipping or in-store pickup deadline.

Source: BIA U.S. Local Advertising Forecast, Sept. 2026. Trends: Tinuiti, 2026 Holiday Shopping Trends.



RETAIL CATEGORY 4 OF 5

Home Centers

2026 ad spend	YoY growth	OOH 2026	DOOH 2026
$3.22B	**+1.2%**	**$70.7M**	**$24.2M**
vs $3.18B in 2025	2025 to 2026	2.2% of category	~26% of its OOH

Where OOH ranks: channels #6–13

2026 spend, $M · #1 is Direct Mail at $1.22B

6	Newspapers Print	$98.1
7	TV OTA	$80.7
8	**OOH**	**$70.7**
9	Email	$67.7
10	Radio Digital	$47.0
11	CTV/OTT	$39.9
12	TV Digital	$24.7
13	**DOOH**	**$24.2**

A project season, not just gifts

The second-largest retail OOH budget here, building frequency across weeks of planning.

1 in 4

shoppers plan to buy discounted decor after the holidays; nearly half will shop year-end sales.

BIA TIP FOR SELLERS

Sell the full project arc, from decor to tools to gifts. Use roadside and large format near home center corridors for frequency, and DOOH to extend into the post-holiday decor and clearance window.

Source: BIA U.S. Local Advertising Forecast, Sept. 2026. Trends: Tinuiti; Narvar and Etail (retailer survey, n=100).



RETAIL CATEGORY 5 OF 5

Warehouse Clubs & Supercenters

2026 ad spend	YoY growth	OOH 2026	DOOH 2026
$1.01B	**+8.3%**	**$23.4M**	**$7.3M**
vs $934.6M in 2025	fastest in report	2.3% of category	~24% of its OOH

Where OOH ranks: channels #6–13

2026 spend, $M · #1 is Direct Mail at $394.1

6	Newspapers Print	$29.4
7	**OOH**	**$23.4**
8	Email	$21.3
9	TV OTA	$19.8
10	Radio Digital	$14.5
11	CTV/OTT	$9.3
12	Cable TV	$7.5
13	**DOOH**	**$7.3**

The fastest grower

The fastest growth in this report and the highest OOH share. A budget expanding your way.

26%

of Gen Z expect to buy gifts online from a membership warehouse, vs. 7% of boomers.

BIA TIP FOR SELLERS

Lead with the growth story. Sell OOH near club and supercenter trade areas for full-household reach, and use DOOH for membership offers and dated limited-time deals that reward repetition.

Source: BIA U.S. Local Advertising Forecast, Sept. 2026. Trends: Tinuiti; Inmar Intelligence (July 2026).

THE SCOREBOARD

Five categories ranked by 2026 out of home spend

Retail category	Category	OOH	DOOH	OOH + DOOH	Share
Clothing Stores	$3.51B	$76.1M	$28.8M	**$104.9M**	3.0%
Home Centers	$3.22B	$70.7M	$24.2M	**$94.9M**	2.9%
Department Stores	$1.31B	$26.7M	$9.8M	**$36.5M**	2.8%
Warehouse Clubs & Supercenters	$1.01B	$23.4M	$7.3M	**$30.7M**	3.0%
Discount Department Stores	$210.7M	$4.4M	$1.6M	**$6.0M**	2.8%
Five-category total	**$9.26B**	**$201.3M**	**$71.7M**	**$273.0M**	**2.9%**

LARGEST BUDGET
Clothing · $104.9M

FASTEST GROWING
Warehouse Clubs · +8.3%

HIGHEST OOH SHARE
Warehouse Clubs · 2.3%

Share = combined OOH + DOOH ÷ total category spend (BIA derived). Source: BIA U.S. Local Advertising Forecast, Sept. 2026.

NEXT STEPS

Where to start this holiday season



Open with the big two

Clothing and home centers carry the largest retail OOH budgets and the clearest seasonal stories. Warehouse clubs grow fastest and give OOH its highest share.

Why DOOH now

DOOH already takes about a quarter of retail OOH in every category. As programmatic grows, it is the part of the budget most open to dated, dayparted creative.

Connect with BIA

Custom OOH and DOOH analysis at the market and category level.

sales@bia.com

advantage.bia.com