

OOH PULSE

ISSUE #10 | APRIL 2026

THE BUYER'S WINDOW.

The Ring Road hasn't been this empty **in 18 months.**



KEY APRIL FIGURES

5350



BILLBOARDS
MONITORED

758



BRANDS
UTILIZING OOH

81%



UTILIZATION
RATE

58



NEW
BILLBOARDS



MARKET VITALITY INDEX (MVI)

94.7



LAST MONTH: 118.55

THE STEEPEST DROP IN OUR TRACKED PERIOD

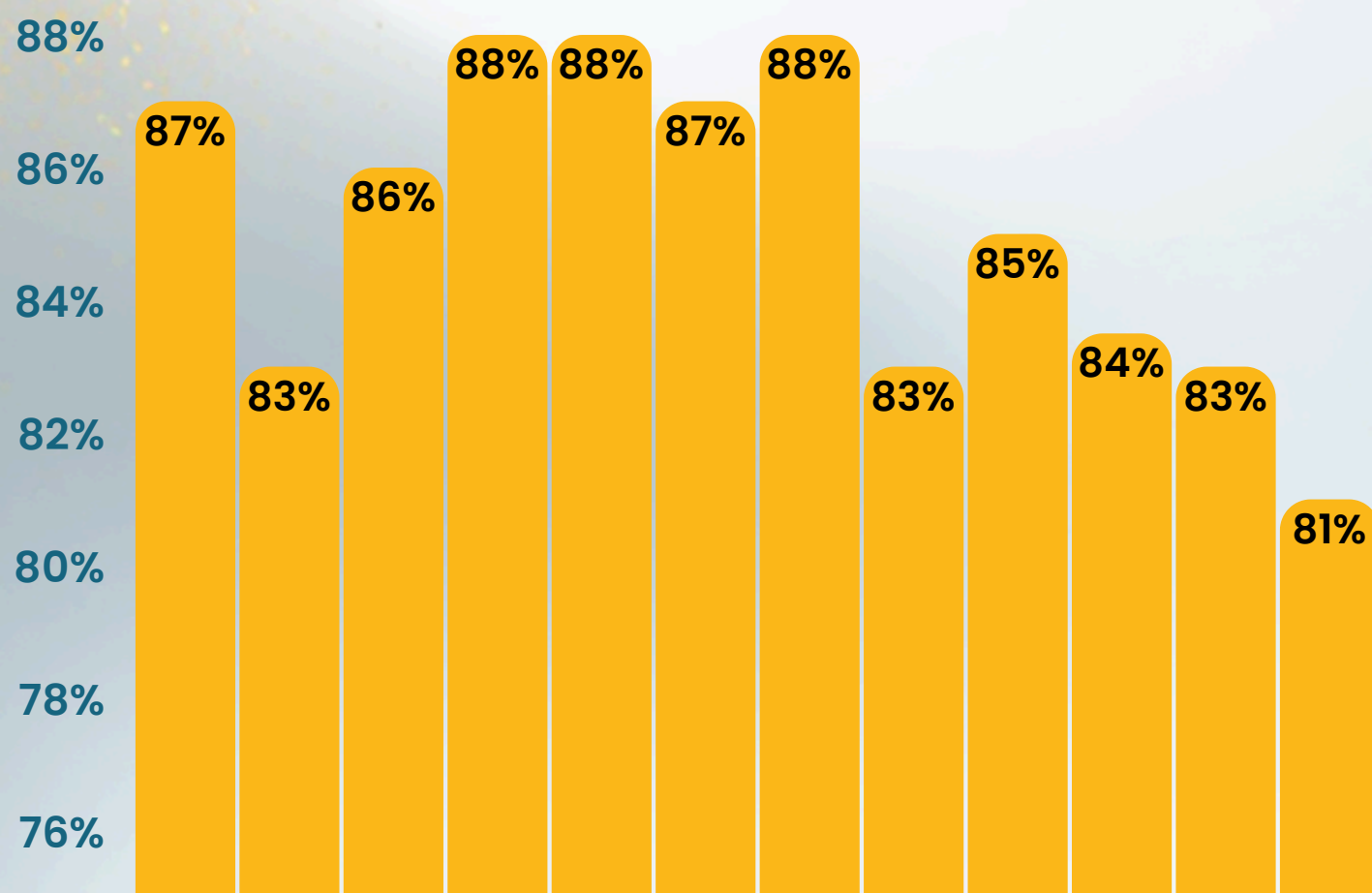
- **Structural Chill:** Post-Ramadan cooling meets a 4th consecutive monthly decline.
- **The Lag Ends:** First cycle fully reflecting regional budget caution.
- **The Cliff:** Ring Road hits 89%, signaling a sharp prime-site correction.



UTILIZATION PULLBACK

RATE DROPS TO 81%

▼ **LOWEST SINCE 2024**



Last 12 Month Utilization Rates

RING ROAD

89% ▼

NEW CAIRO

83% ▼

OCTOBER BRIDGE

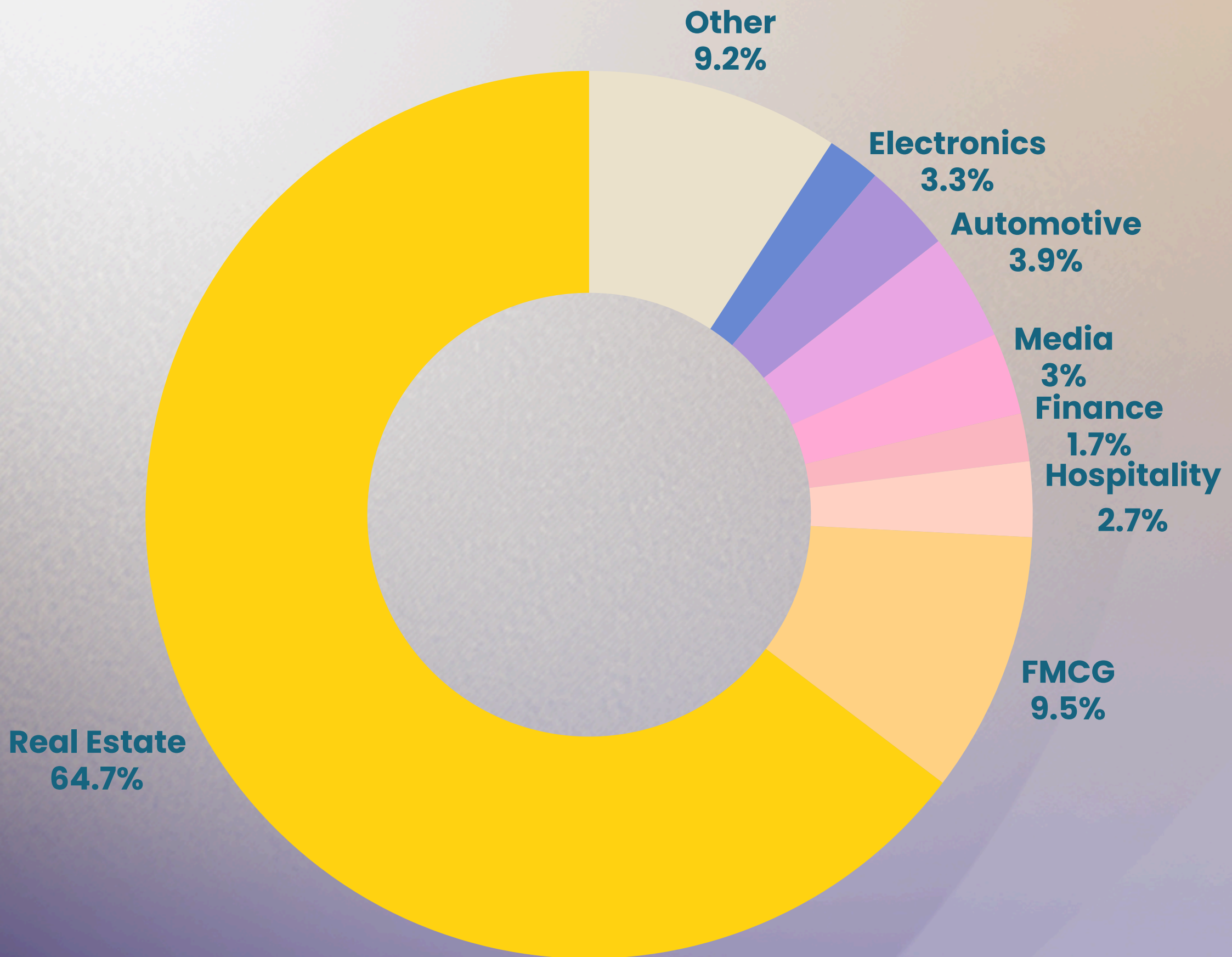
77% ▼

MARKET LOGIC

- **Prime Thinning:** Ring Road utilization hits a historical low of 89%, signaling a rare retreat by non-Real Estate anchors.
- **Budget Lag:** April reflects the first full cycle of "Wait-and-See" boardroom decisions finally hitting the street.
- **Buyer Window:** 1 in 10 tier-1 boards is now vacant, offering the strongest leverage for site upgrades in 18 months.



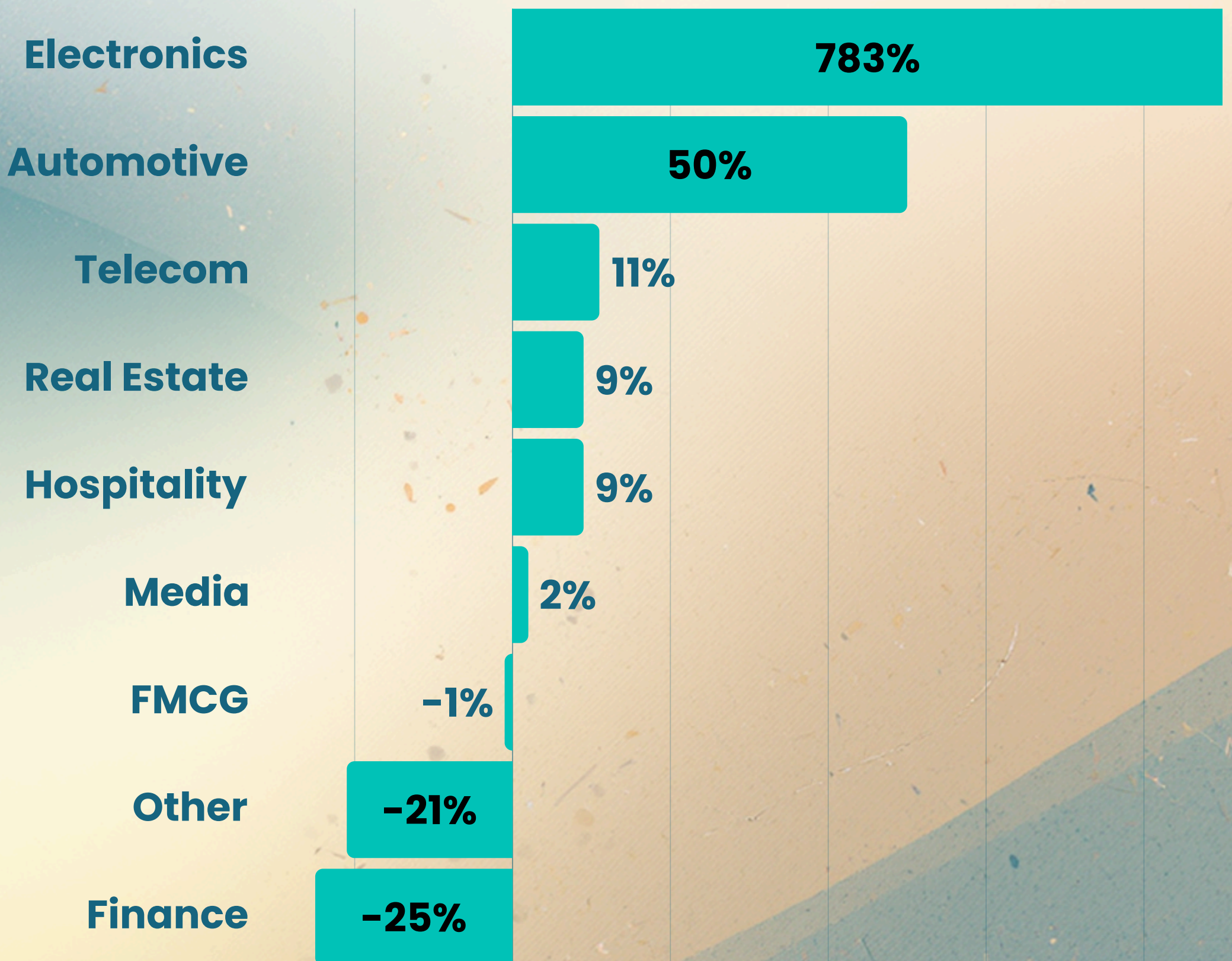
INDUSTRY EXPENDITURE SHARE



April reveals a reactive monopoly. Real Estate share peaked at 65% as active brands dropped 3.6%. Its dominance climbed as Telecom, Media, and Hospitality pulled back aggressively. This "vacuum" at the top gives active brands more leverage in negotiations.



APRIL YOY: SURGES VS. SLUMPS

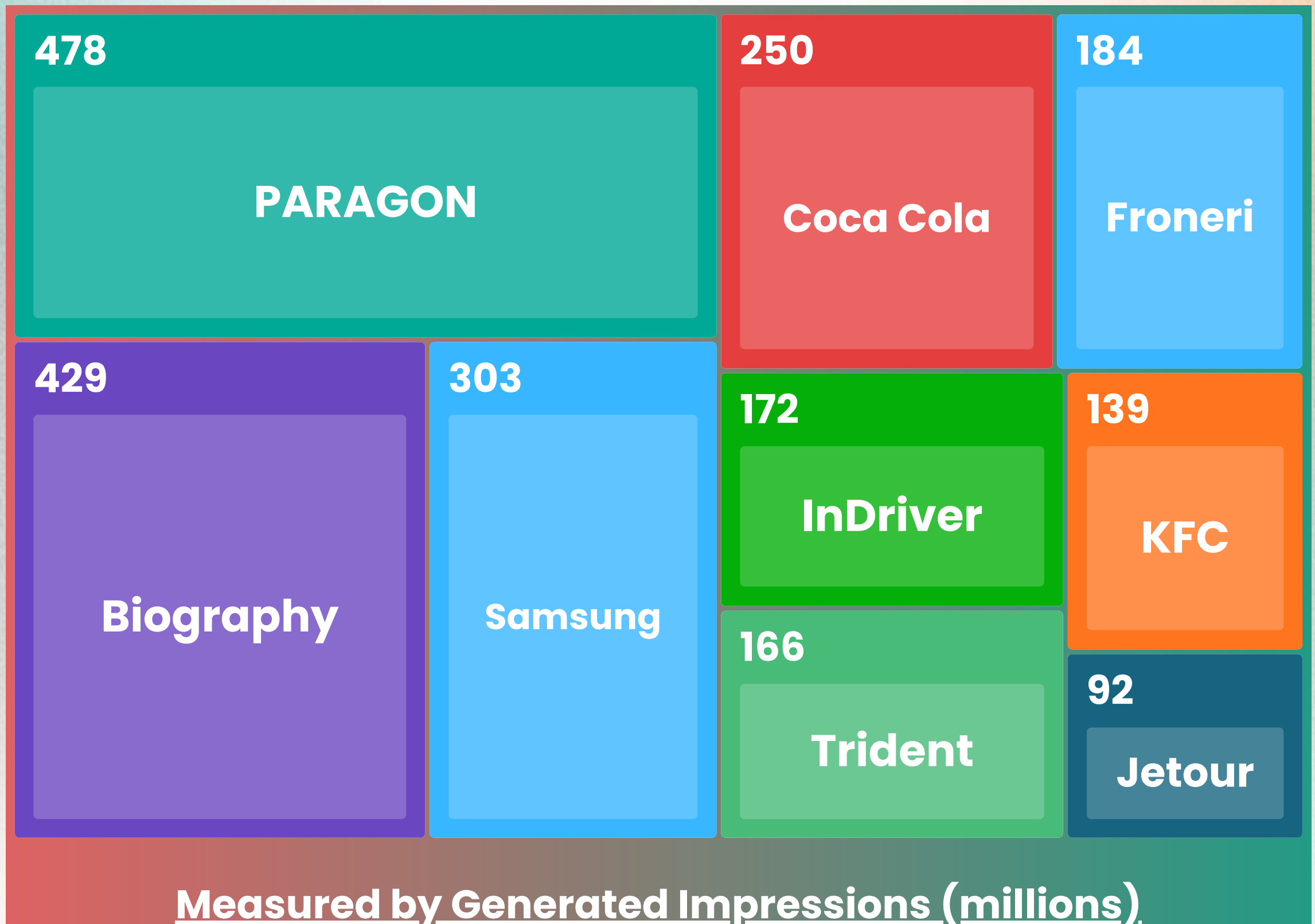


Consumer-facing sectors are defying the chill. Electronics surged +783% MoLY through massive inventory clearing, while Automotive grew +50% MoLY despite the broader market correction. It's a clear signal: while some giants retreat, the "durables" and mobility economies are still fighting hard for attention.



NOTABLE OOH CAMPAIGNS

APRIL 2026



Notable campaigns were led by Paragon and Biography in real estate, alongside heavyweights Samsung and Coca Cola. Despite a 3.6% drop in active brands, these leaders maintained a massive footprint, capturing the share of voice vacated by retreating smaller players.



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PLANNING & TARGETING

Pre Launch

Market Surveys

Discover OOH trends across the Egyptian market & within your sector.

Plan Validation & Optimization

Assess & Optimize media selection based on traffic, impressions and dwell time.

Services include:

- Location Assessment
- Scenario Testing
- Budget Validation

EXECUTION & DIAGNOSTICS

Post Launch

Proof of Performance

Real-time verification that campaigns are live, correct, and compliant throughout the entire flight.

End of Campaign Reports

Detailed assessment on campaign reach, dwell, impressions, and ROI.

Competitive Monitoring

Ongoing tracking of OOH usage, utilization, and artwork freshness.



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