

Asia Pacific Digital-Out-Of-Home (Dooh) Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Asia Pacific DOOH Market is expected to register a CAGR of 17.5% over the forecast period. The Asia-Pacific has the largest population among all the regions. With a rise in the urban population and increased purchasing power, Asia-Pacific is considered one of the largest markets for Digital OOH.

Key Highlights

The developed infrastructure of the region plays a significant role in developing the Digital OOH market. Moreover, the region is dominated by various local players, like Shanghai Media Group and Times Internet, while substantial players, like JCDecaux, also have considerable market share in this region. Brands using DOOH could utilize the benefits of digital display advertising, such as data-driven targeting, measurement, and the flexibility to set creative mid-campaign based on performance and the assurance of viewability and non-fraudulent traffic.

The largest global middle class, rapid infrastructure growth, accelerating digitization, and sprawling metropolises are prominent factors in the rampant allocation of digital screens. Countries like Thailand, Malaysia, and the Philippines are automating out-of-home spaces relatively fast due to market fragmentation, with many new players emerging in these markets, which are purely digital.

The market is witnessing various partnerships and acquisitions from vendors to enhance its market position. For instance, in June 2022, Hivestack, a programmatic digital out-of-home AD tech company, extended its partnership with Asiaray Media Group Limited with a strategic focus on mega transport advertising media management, including metro lines, airport, and high-speed rail lines.

Moreover, the various initiatives launched by the market players are further boosting the growth of the DOOH market. For instance, in September 2022, Times of India launched a DOOH campaign in partnership with Times OOH. The campaign aimed at communicating a wide array of stories about India, using a series of intriguing images that invoke viewers to think and know about

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unique aspects of India.

The outbreak of COVID-19 halted digitization, but it also opened doors for introducing new technologies and displays. Keeping public safety in mind, as people moved towards more relaxed restrictions with social distancing and hygiene being the utmost priority, more smart utility-digital displays are likely to emerge equipped with facial-identity scanners, thermal detectors, cue management platforms across congregation points such as retail, transit, hospitality, banking, and education sectors. This influx of DOOH-utility infrastructure could help boost the digitization drive in the region and create a new opportunity for the DOOH Industry.

APAC Digital-Out-of-Home Market Trends

Transit is Expected to Hold Major Share

The rising demand for digital content and information relevant to travelers has led to interactive ads through different modes of advertisements, such as Kiosks, billboards, and Signboards, at the platform that accounts for a significant share of growth in transportation media revenues. There has been a shift in consumer behavior regarding customer engagement across various modes of transportation, thereby strategically building the brands in the customer mindset. This will drive potential customers against traditional media over the next three years.

Among various transit environments, airports have proven themselves to be ideal for advertising, particularly for top-tier and luxury brands. Airports are under constant pressure to figure out ways to generate more and more revenue. Converting static displays like posters to digital displays allows airports to utilize the same space to sell to multiple advertisers. That multiplies the amount of income exponentially. Airports can also share the cost burden of upgrading to new advertising technologies by bringing in advertising partners.

In June 2022, Adani Airports Holdings Ltd engaged Lemma as a tech partner to power programmatic DOOH. The adoption of programmatic advertising aligns with the goal of modernizing India's major airports with the latest infrastructure and technology. Furthermore, Lifestyle platform TataCLiQ executed its first programmatic DOOH campaign recently for TheLUXELife at airports in partnership with Lemma. The campaign aims to reach audiences exhibiting a high affinity for online shopping and luxury products. Expanding their programmatic portfolio, Tata CLiQ Luxury, along with Lemma, ran the campaign with Google DV360 as the demand side platform, giving the brand real-time validation of the DOOH campaign across multiple screens at various locations. The lockdown prompted by the spread of COVID-19 in Asia-Pacific brought the RA-OOH (Railway Audio Advertising) to a standstill. Major public modes of transport were restricted in the region, and significant transit OOH mediums, such as bus stands, were gone unnoticed during this period. The lockdown took a hit on several media industries, and OOH properties were hit significantly. RA- OOH advertising has a cluster of consumer touchpoints and is one of the most budget-effective and innovative techniques to reach the mass hyper-local target audience. Due to the lockdown, the touchpoints were disrupted. However, with the reopening of the economies and the transport operations coming back to normal, has provided boost to the market growth.

China is Expected to Hold Major Share

According to Doohken Network, the China OOH market is around USD 9 billion, of which between 25% and 30% is what could be called digital. Digital screens and spending are increasing faster due to multiple factors. Some are as basic as more availability of cheaper, higher-quality screens, while advertisers want better audience engagement and impact from their creative messages, plus the introduction of new technologies.

Another key driver is that most video advertising is now in shorter lengths, even 3-5 seconds, so the video can now work effectively on digital screens to build reach for mass media campaigns. It is expected that over the next years, Digital Outdoor

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spending will grow significantly while static outdoor, except for large format billboard ads, will decline in China.

The growing popularity of programmatic DOOH in the region can be attributed to several factors, such as the increase in available Chinese DOOH inventory, the strength of local data partners to power programmatic campaigns, and the overall growing need for local brands and advertisers to target audiences within the market.

In November 2022, Hivestack, a programmatic digital-out-of-home ad tech company, announced its partnership with Tulip Media for outdoor LED media screens in China. This partnership will help local and global brands, agencies, and omnichannel DSPs to access the Hivestack supply-side platform to buy more than 100 outdoor mega screens in over 15 first and second-tier key cities in China, including Beijing, Shanghai, Guangzhou, and Shenzhen.

With the outbreak of COVID-19, several brands across China have put a temporary hold on DOOH ads, but screens haven't gone dark altogether. Though some media owners have taken their networks offline, other players have transitioned their display screens into an information source for the public, with measures that remind people to keep their distance, wash their hands frequently, and provide essential updates.

Networks screens in residential elevators have also remained incredibly active, sharing Public Service Announcements, ads for learning and education apps, and local restaurants offering takeout. China has seen more DOOH campaigns emerge as lockdown measures relax and more people venture outside. Media owners in China are beginning to report a steady uptick in campaign bookings.

APAC Digital-Out-of-Home Market Competitor Analysis

The Asia Pacific Digital-Out-of-Home (DOOH) Market is highly fragmented. It comprises several extensive outdoor advertising and media companies with operations in multiple markets, as well as the smaller, local companies operating a limited number of structures in one or a few local markets. Some of the major players in the market include JCDecaux Group, Clear Channel Outdoor Holdings Inc., BroadSign International LLC, Outfront Media Inc., etc.

In June 2022, Srishti Group and Armour Digital OOH established a strategic partnership to drive DOOH expansion in the southern Indian markets. The strategic partnership has been defined for OOH business at Chennai Central, Chennai Egmore, Hubli, Belgaum, Dharwad, and Hospet railway stations.

In June 2022, JCDecaux Singapore launched programmatic trading for its inventory of 50 digital screens at Singapore Changi Airport Group. The offering will connect advertisers and media buyers to advertising inventory at Changi Airport via VIOOH, a global digital OOH supply-side platform connected to leverage global demand-side platforms. With this launch, JCDecaux said its programmatic DOOH offering would have 120 million monthly impressions across 191 digital screens islandwide.

Additional Benefits:

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

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