

South East Asia Digital Out-of-Home (DooH) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 141 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:

The South East Asia Digital Out-of-Home (DOOH) Market is valued at USD 582.30 billion in the previous year and is expected to register a CAGR of 5.56 % during the forecast period to become USD 855.4 billion by the next five years. DooH advertising is out-of-home advertising that is powered by digital signage technologies. These technologies use AI and analytics to help marketers get the right message to the right people at the right time.

Key Highlights

- The offline advertising business is slowly adopting new technologies, like geofencing and beacons, which make tracking and customization possible in ways that weren't possible before. This is helping the market grow significantly.
- DooH is being used in the right places for many reasons, such as how easy it is to manage, how quickly it can be changed, how cheap it is, how well it can target a market, and more. Advertisers and marketers can use DooH to send multiple pieces of information to a network of devices and connect to these devices remotely to update their content. Because of government restrictions on offline shopping, COVID-19 caused a big loss for the DooH advertising business.
- DooH allows sellers in the region to modify the displays and communications more rapidly and allows the information to reach potential buyers at a lower cost and with better effectiveness. Additionally, it is simple to manage in comparison to conventional advertisements. Digital signs provide up-to-the-minute details on products and accessibility, interactive information, and visually appealing images and videos.
- Smart city projects use different kinds of digital displays to make sure the city runs smoothly, and every digital display can be used to make money from ads. Digital signage technology assists in capitalizing on these prospects. From small interactive kiosk screens to large-format digital billboards, systems deliver the computing performance, high-quality graphics, and connectivity needed to make an impression and the analytics needed to disclose critical information.
- Furthermore, the region has been witnessing expansions from global companies, as they offer lucrative opportunities to the

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

solution providers for development and growth. For instance, in August 2022, Vistar Media announced the deployment of full programmatic capabilities in Indonesia, Malaysia, the Philippines, and Hong Kong. This broadens the company's already established presence in the APAC area, which includes Singapore, Australia, and New Zealand. The major source of programmatic demand transactions for digital out-of-home is the Vistar Demand-Side Platform (DSP). Through both open exchange and private marketplace partnerships, advertisers and agencies in Southeast Asia may now use the Vistar DSP to design, purchase, and assess data-driven out-of-home (ooH) campaigns.

-User engagement with DooH is difficult to quantify because counting exact DooH impressions is impossible. While vendors can predict traffic near a specific outdoor ad using smartphone location data, it may not be an exact count, and it does not include the integration of face recognition to establish people's gender and age who have already seen the advertisements, which makes the implementation more complex and hinders the market's growth.

-Even though COVID-19 helped news publishers get more traffic and increase the value of their digital inventory, programmatic CPM fell because of concerns about brand safety in COVID-19 content.

South East Asia Digital Out-of-Home (DooH) Market Trends

Billboards to Witness Significant Growth

- Due to Singapore's sizable billboard concentration, companies that acquire DooH advertising would have considerable opportunities to increase their brand awareness and visibility. The industry has also made strides in measuring the interactions brought about by DooH (for instance, through interactive displays and ads that allow opt-ins through QR codes), so the businesses will have data to back their assessments of the efficacy of their campaigns through significant investments in the digital billboard advertising in the country.

- In Singapore, digital ooH billboards can be displayed or mounted on any of the following: shopping centers, grocers, petrol stations, pubs, and restaurants; LCD public announcement kiosks with free Wi-Fi; hospitals, clinics, and doctor's offices; condominiums, housing developments, and office towers; movie theaters, sports stadiums, and entertainment venues; major thoroughfares; areas where there is a lot of foot activity.

- Billboard advertising in DooH is the first and most effective form of outdoor advertising medium because of its unique offerings as an advertising platform to reach the maximum number of audiences. Thailand consists of two major cities, including Thailand and Pattaya, creating a significant opportunity for market growth in the country because digital billboards can be mounted on roadside poles to drive audiences' attention.

- Furthermore, recent innovations such as the evolution of 3D and mobile billboards are also expected to influence the growth of the studied market, as they significantly expand the use cases and support the new way of advertising, as well as help businesses enhance the customer experience in an innovative way.

- The DooH industry in Indonesia is witnessing a rapid transition toward digitalization. Digital billboards have become much more widespread in and outside of Indonesia. Combined with modern advertising technology, these dynamic displays have the same high reach as traditional billboards but with the added benefit of providing deeper analytics capabilities.

- Billboards hold a significant share of the DooH market in the Philippines. A billboard is an effective form of advertising, giving maximum exposure to the brand's products and services to a high volume of people at various locations.

- Vietnam has significant traditional billboards installed across various cities. According to Shojiki Advertising JSC, a well-known advertising firm, there are 17,135 large-sized outdoor billboards in Vietnam, most of which are located in the four major cities of Ho Chi Minh, Hanoi, Da Nang, and Can Tho.

- Moreover, various players are focusing on expanding their presence in the studied market to gain more customers and strengthen their position. For instance, in November 2022, DooHClick announced that it entered the Malaysian market as an ad management partner for Sanctuary Billboards. Sanctuary will leverage DooHClick's platform to enhance its revenue, sales, dynamic scheduling, and reporting capability across its large format roadside portfolio.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Malaysia to Witness Major Growth

- Malaysia's ooH market is expected to grow significantly in the coming years due to increased interest from advertisers and marketers as well as the numerous benefits, such as the fact that ooH advertising remains one of the most cost-effective media channels for advertisers while also having a significant impact on consumers due to their contrast and size to the real-world environment.
- Additionally, demand for more innovative media in advertising is increasing among advertisers and brand owners around the country, thus positively impacting ooH market growth. Furthermore, in today's competitive market, the increasing focus of organizations in the country drives the demand for ooH solutions to create impactful ooH campaigns to increase their visibility and drive business growth.
- For instance, in November 2022, GroupM and Moving Walls announced a strategic partnership to bring automation and accountability to Digital Out-of-Home (DOOH) advertising in Malaysia. This partnership will provide GroupM agencies clients (Mindshare, m/Six, MediaCom, and Wavemaker) to leverage Moving Audiences Plus, an audience data-driven planning, buying, measurement, and ad-play verification solution that can activate all connected DOOH screens across the country.
- Similarly, in January 2022, Hivestack announced the launch of full operations in Malaysia. Several agencies, brands, and omnichannel demand-side platforms (DSPs) in Malaysia can access the Hivestack platform to plan, activate, and measure programmatic DOOH campaigns via Private Marketplace (PMP) and Open Exchange deals.
- Further, the growth in digital displays offers a promising future for the ooH market in the country. This has resulted in significant growth in the digital OOH segment in the past few years compared to the static OOH segment in the country. However, with technological advances, the static ooH segment is expected to hold a significant share in the coming years.
- The Malaysian DooH has been witnessing significant growth in the past two years and is expected to grow at a significant rate over the forecast period due to factors such as the digitization and automation trend, the increasing digitization of ooH billboards and displays across the country, and growth in demand from commercial sectors such as real estate, retail, automotive, etc.
- The demand for advertising in the country is driven by the many benefits of DooH campaigns, such as their high rate of recall and low cost compared to many other types of advertising. Also, the improvements and new ideas that DooH market vendors have come up with have led to better personalization, better targeting, and more accurate measurement, which has helped the market grow quickly in the country.

South East Asia Digital Out-of-Home (DooH) Industry Overview

The Southeast Asian digital out-of-home (DooH) market is fragmented, with the presence of a few major companies. The companies continuously invest in strategic partnerships and product developments to gain market share.

In April 2023, SPH Media Limited announced a strategic collaboration with Nikkei Inc. for the development of applications based on artificial intelligence (AI) and readership development. Through this collaboration, both companies will start organizing regular mutual study trips and share the best experience and practices among editorial personnel and aim to further enhance the usage of data analytics and the development of the editorial talent.

In February 2023, Foodpanda Singapore announced a strategic partnership with Clear Channel Singapore to launch a real-time user-generated out-of-home execution across Clear Channel Singapore's digital screens, Play+Display, as part of their 360-media campaign.

Additional Benefits:

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

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

Table of Contents:

1 INTRODUCTION

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

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Ongoing Shift Toward Digital Advertising Aided by Increased Spending on Smart City Projects
 - 4.2.2 High Demand from Commercial Segment
- 4.3 Market Challenges
 - 4.3.1 Operational Challenges Related to Measurement of Advertising Effectiveness, Cost and Market Fragmentation
- 4.4 Key Global Cues Expected to find their way into the SEA DooH Market
- 4.5 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.5.1 Bargaining Power of Suppliers
 - 4.5.2 Bargaining Power of Buyers
 - 4.5.3 Threat of New Entrants
 - 4.5.4 Threat of Substitutes
 - 4.5.5 Intensity of Competitive Rivalry
- 4.6 Industry Ecosystem Analysis
- 4.7 Impact of COVID-19 on the DooH Market

5 SOUTH EAST ASIA DooH MARKET LANDSCAPE

- 5.1 Malaysia DooH Market Landscape
 - 5.1.1 Malaysia ooH Market
 - 5.1.2 Malaysia DooH Market
 - 5.1.3 Segmentation by Application
- 5.2 Singapore DooH Market Landscape
 - 5.2.1 Singapore ooH Market
 - 5.2.2 Singapore DooH Market
 - 5.2.3 Segmentation by Application
- 5.3 Thailand DooH Market Landscape
 - 5.3.1 Thailand ooH Market
 - 5.3.2 Thailand DooH Market
 - 5.3.3 Segmentation by Application
- 5.4 Indonesia DooH Market Landscape
 - 5.4.1 Indonesia DooH Market
 - 5.4.2 Indonesia DooH Market
 - 5.4.3 Segmentation by Application

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

5.5 Philippines DooH Market Landscape

5.5.1 Philippines DooH Market

5.5.2 Philippines DooH Market

5.5.3 Segmentation by Application

5.6 Vietnam DooH Market Landscape

5.6.1 Vietnam DooH Market

5.6.2 Vietnam DooH Market

5.6.3 Segmentation by Application

6 COMPETITIVE LANDSCAPE

6.1 Company Profiles

6.1.1 JCDecaux Singapore Pte Ltd.

6.1.2 Clear Channel Singapore Pte Ltd.

6.1.3 Ooh!Media Digital PTY Limited

6.1.4 Hivestack Inc.

6.1.5 Moove Media Pte Ltd.

6.1.6 SPHMBO (Singapore Press Holding Ltd.)

6.1.7 Vistar Media

6.1.8 Talon outdoor limited

6.1.9 Mediatech Services Pte Ltd.

6.1.10 Daktronics Inc.

6.1.11 Neosys Documail (S) Pte Ltd.

6.1.12 TAC Media Sdb Bhd

6.1.13 Moving Walls

6.1.14 Pi Interactive (Brandlah)

7 FUTURE DooH MARKET OUTLOOK

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

South East Asia Digital Out-of-Home (DooH) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 141 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@scotts-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@scotts-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*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-02
		Signature	

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

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