

South East Asia Digital Out-of-Home (DooH) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The South East Asia Digital Out-of-Home Market size is estimated at USD 684.93 billion in 2025, and is expected to reach USD 897.72 billion by 2030, at a CAGR of 5.56% during the forecast period (2025-2030).

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. Government restrictions on offline shopping due to the COVID-19 pandemic 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 simpler to manage than 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.

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- Furthermore, the region has been witnessing expansions from global companies, as they offer lucrative opportunities to the solution providers for development and growth. For instance, during the InfoComm Asia 2023 event, Samsung partnered with regional companies to showcase the latest professional audio-visual technology for businesses returning to the office, as well as customers seeking engaging interactions with companies.
- 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 the pandemic 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, DooH 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; and 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, which creates 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 market studied, 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.
- In December 2023, Location Media Xchange (LMX) and D0media formed a partnership to provide more than 15,000 OOH (out-of-home) advertising assets for purchase online through BillboardsIn.com, the most widely used local OOH ad marketplace in the world. Advertisers can now plan and purchase local ad campaigns across Singapore, Malaysia, Indonesia, Thailand, the Philippines, Vietnam, and India.

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Malaysia to Witness Major Growth

- The Malaysian 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 the ooH market's 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 December 2023, Vistar Media and Big Tree announced a partnership to bring a variety of premium digital screens to advertisers throughout Malaysia. Vistar Media is a global provider of programmatic technology for digital out-of-home (DooH), while Big Tree is a Malaysian out-of-home (ooH) advertising solutions provider. Through their collaboration, Vistar can effortlessly connect advertisers from around the world to Big Tree's network of 30 digital venues, which include outdoor billboards, retail shopping malls, and transit train stations.
- 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, and automotive.
- 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. 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.

April 2024: Plan B Media, a prominent provider of out-of-home (OOH) media services in Thailand and other Southeast Asian markets, partnered with Vistar Media, a leading programmatic solutions provider, to enhance the digital out-of-home (DOOH) advertising landscape in Thailand and Singapore. The collaboration aims to bring seamless programmatic solutions to the region's DooH advertising industry.

October 2023: Hivestack, the world's leading independent programmatic DooH ad tech company, expanded its presence in Thailand by partnering with UpMedia, a local media owner that specializes in elevator screens.

Additional Benefits:

- The market estimate (ME) sheet in Excel format

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