

Programmatic DOOH 2023

Mainland China white paper



State of the Nation the

Counterparts

01 Introduction

02 The State of Play

- ◆ Current adoption of programmatic DOOH
- ◆ Drivers of programmatic DOOH adoption
- ◆ Programmatic DOOH as part of the omni-channel media mix
- ◆ Full funnel activation

03 Defining the new landscape

(What is next for programmatic DOOH?)

- ◆ Expected demand for programmatic DOOH
- ◆ Future investment

04 Overcoming barriers to adoption

- ◆ More widespread understanding of programmatic DOOH
- ◆ Evaluating advertising impact
- ◆ Measurement and data granularity

05 Summary

Executive summary



In March 2023, VIOOH partnered with Marketing Research Institute to survey 105 agencies and advertising executives on the adoption of programmatic digital out of home (DOOH) in mainland China market.

Compared to the global market, the development of programmatic DOOH in mainland China is still in its early stages, yet due to the increasing demand for precision and flexibility, programmatic is accelerating the empowerment of the DOOH market in mainland China.

The value of programmatic DOOH has been recognized for achieving both performance and branding goals. At the same time, its strategic position in omni-channel marketing is irreplaceable, showcasing the synergy it has with other digital channels such as social media, digital audio and lift/building interiors media in covering the entire funnel.

Currently, most industry professionals are optimistic about the future of programmatic DOOH, but they lack a deeper understanding of its specific applications such as data metrics, measurement and audience analysis.

Therefore, in terms of investment value evaluation, the industry generally needs more tangible indicators to prove its value. This also indicates that the current mainland China market still lacks the popularity and education of related technologies, and the industry awareness is relatively low.

Despite facing certain obstacles, the growth trend of programmatic DOOH in 2023 is still promising, and demand is expected to grow rapidly. In addition, the industry is actively deploying the technological foundation of programmatic DOOH, and nearly 90% of industry professionals are set to increase investments to build internal expertise.



The programmatic DOOH (digital out-of-home) in this report refers to digital out-of-home media that is traded and placed based on automation technology. Unlike lift/building interiors media, DOOH in this report specifically refers to media formats based on outdoor digital advertising billboards

Introduction



Today in the fierce competition for ad placements in the information-overloaded online environment, advertisers urgently need differentiated media channels, in order to stand out. At the same time, with the fading negative impact of the pandemic and the recovery of offline scenarios, advertisers are naturally refocusing on outdoor advertising.

Advertisers have increasingly demanding requirements for precision targeting which traditional OOH and DOOH have historically been unable to meet, thereby opening the door for new technologies.

With the development of digital and intelligent technologies, programmatic has empowered DOOH in recent years, bringing more precise buying methods.

Faced with pressure from the macro environment in recent years, advertisers have tightened their marketing budgets. Due to flexible placements and the quantifiable effects of programmatic DOOH, advertisers can more accurately allocate their advertising budgets. With advanced data capabilities, programmatic DOOH is helping advertisers access target audiences at the right time and in the right place based on consumer behavior patterns, driving campaign effectiveness. At the same time, advertisers can pivot and switch programmatic DOOH campaigns on or off as required in a short period of time, based on the dynamics of market activities, continuously optimising their advertising campaigns.

Currently, programmatic DOOH not only has the advantage of automated buying, but also has significant advantages in precise targeting and performance management. However, compared to the international market, this field is still in its nascent stage in mainland China and has a lot of room for development. Following the 2022 State of the Nation report in the UK, US, Australia, Germany, and France, VIOOH partnered with China's Marketing Research Institute to survey targeting advertisers, media agencies, and research institutions to understand the industry's current views on programmatic DOOH and its position in brand omni-channel marketing strategies. Through in-depth industry insights, this report outlines the development of programmatic DOOH in the mainland China market.

Programmatic DOOH: Distinctly unique



The application of “programmatic buying” in online advertising has been widely seen. With the advancement of advertising technology and deepening of industry practice, OOH media owners have enabled programmatic buying in recent years, allowing for its inclusion in the programmatic advertising strategy of advertisers.

Compared to paper OOH, DOOH encompasses diverse formats, varied content and wide coverage. However, even with traditionally purchased DOOH, advertisers still need to determine the time and creative for campaigns in advance, match target audiences based on expected data, and manually integrate data with other digital channels. Moreover, the impact of advertising on brand and sales, as well as the number of customers reached, can only be measured after the placement.

Programmatic DOOH has emerged based on traditional DOOH, which has improved the digitalization of traditional OOH and enabled OOH to be traded automatically and programmatically like online ads. Using demand-side platforms (DSP), purchases are made through private marketplaces (PMPs) or open auctions with real-time bidding to achieve the automated placement of DOOH transactions. Compared to traditional DOOH, programmatic DOOH does not require a fixed time frame to be set in advance. Advertisers can purchase media inventory in real-time based on placement effectiveness, pivot and switch on/off programmatic DOOH campaigns as required at short notice, and continuously optimise campaigns in-flight.

In fact, programmatic not only provides new transaction methods for DOOH, but also enables advertisers to precisely target specific audiences and optimise campaigns. Based on programmatic technology, different creative content can be triggered in a timely manner based on environmental data (such as weather conditions, audience attributes, and behaviour patterns) and market activities (such as special holidays, promotional offers, and new product launches), achieving precise information transmission and maximising the attraction of target audiences. In terms of performance evaluation, near real-time reporting permits advertisers to observe how locations are performing and optimise their campaign by moving spend to locations that are performing well.





Current adoption of programmatic DOOH

According to the results of VIOOH's previous State of the Nation reports, the appetite and demand for buying programmatic DOOH in global markets have markedly increased over the last few years, and its technical capabilities have evolved significantly since its inception. Today, through programmatic DOOH, advertisers can overlay a wealth of data sources to target audiences with laser precision. Coupled with the flexibility that programmatic DOOH offers to optimise campaigns in-flight, this has afforded advertisers greater opportunities to access relevant audience in the right place and at the right time, bringing huge opportunities to the market.



"The efficiency and accuracy of outdoor advertising have been enhanced by programmatic and digitisation. With higher precision and wider reach of outdoor advertising, more scenarios and opportunities can be created. The trend of programmatic and digitisation empowering traditional media is becoming more and more apparent"

Global Media Director
Fortune 500 Consumer Electronics Company

"With the gradual increase in social mobility, the value of outdoor advertising is further highlighted. Some people previously believed that online would replace offline, or that the digital economy would replace the physical economy, but this is not the case. At the same time, some top Internet capital has also entered the field of outdoor advertising in recent years, gradually integrating with offline media resources, and this trend may be further strengthened in the future. In addition, scenario marketing is also extending from the online field to the offline field of outdoor advertising, bringing easier resonance with advertisements and stronger user experiences. This scenario-based display is one of the important characteristics of outdoor advertising"

New Media Researcher
Well-known University in Beijing

24%
51% GLOBAL

IN THE LAST YEAR, NEARLY 24% OF CHINA MEDIA PROFESSIONALS SURVEYED HAVE PLANNED, PLACED OR BOUGHT PROGRAMMATIC DOOH IN CAMPAIGNS

Although the pandemic has brought restrictions to offline activities, it has also fueled online and programmatic advertising. Advertisers and agencies have become accustomed to the flexibility of programmatic buying, and greatly value the ability that programmatic buying affords to quickly respond to changing consumer behaviour and reach audiences where they are. This trend is gradually shifting to the offline world. **In 2022, 24% of advertisers and agencies have already invested in programmatic DOOH.**

However, compared to the 51% adoption rate in global markets (including the UK, US, Australia, Germany, and France) last year, programmatic DOOH in the mainland China market is still in its infancy.

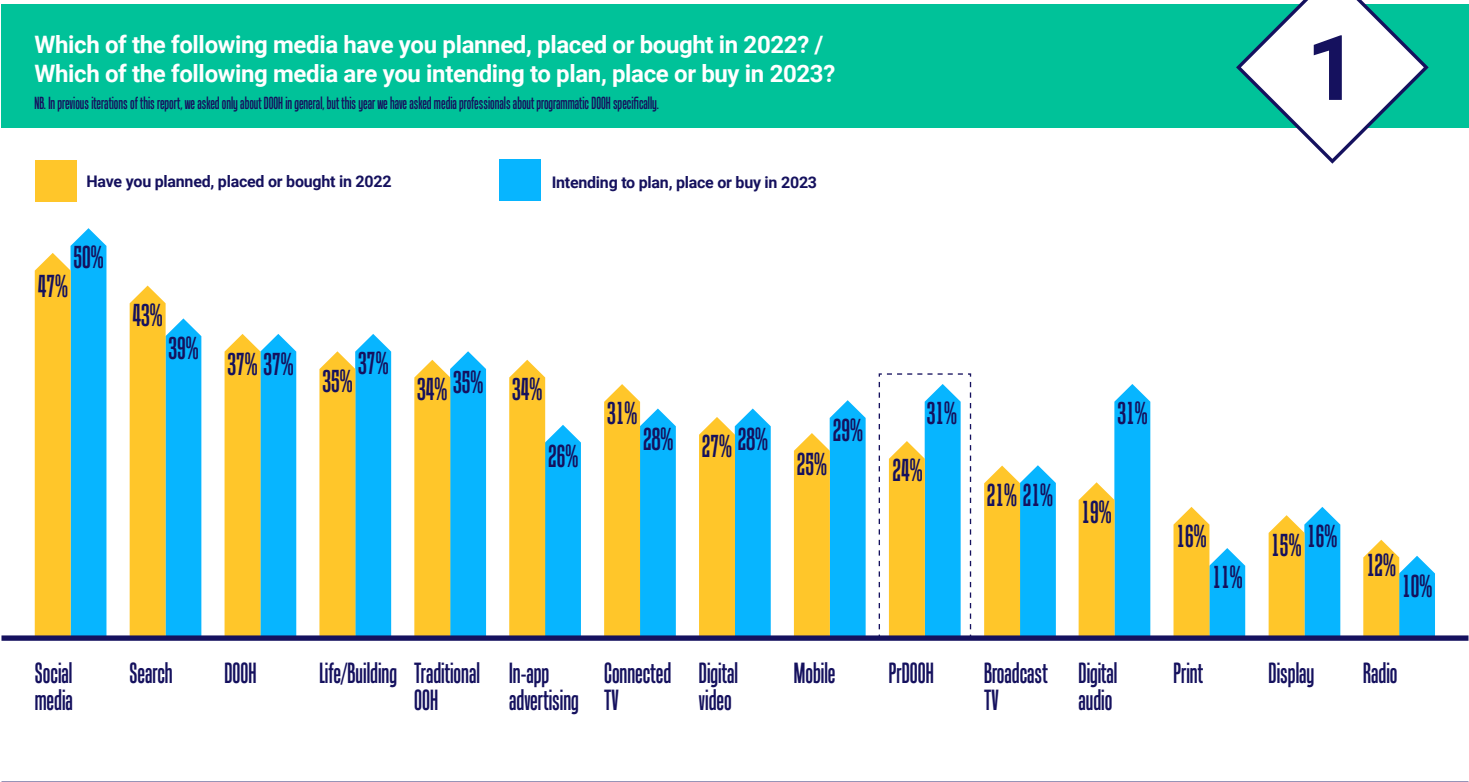


"With the recovery of offline scenarios, people's outdoor activities will increase, which means that there will be an increase in adoption of outdoor advertising compared to that before the pandemic. Advertisers' brand communication strategy will also change faced with this situation, which means that an increasing number of advertisers may try programmatic DOOH"

Assistant President
Leading Overseas Media Agency

Demand for programmatic DOOH is expected to continue to grow in 2023. Although the adoption rate of programmatic DOOH was not high in 2022, its demand is expected to show significant growth in 2023. **24% said they have planned, bought or placed DOOH programmatically in 2022, and this is set to increase to 31% in 2023.**

Compared to the international market, although the adoption rate of programmatic DOOH in the mainland China is relatively low, it has a faster growth rate.



Base size: all respondents (105)



"In China, the share of DOOH or programmatic DOOH may be lower than that of the United States, but in terms of development level and growth rate, regardless of new business models or new phenomena, I believe that China is leading globally. In terms of the size of the advertising market, although it started relatively late, it has developed rapidly."

At the same time, outdoor advertising is also linked to urbanisation. Based on the screens, China represents one of the largest DOOH market globally. Therefore, with the growth in DOOH, the inventory of programmatic DOOH will also increase rapidly"

Marketing Professor
Well-known University in Shanghai

Over 30% of media professionals who plan to increase the budget for programmatic DOOH said that they would bring new budgets into programmatic DOOH.

If budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?

2

46% OTHER TRADITIONAL CHANNELS

33% NEW BUDGET ADDED

26% OTHER DIGITAL BUDGETS

Base size: all increasing programmatic DOOH (46)

Each channel has its own value, and advertisers can try new channels such as programmatic DOOH and continuously explore its value



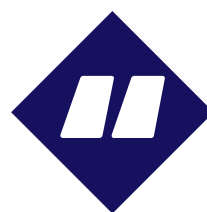


Drivers of programmatic DOOH adoption

Programmatic DOOH delivers a range of benefits for advertisers.

Buying DOOH programmatically adds a layer of agility to campaigns that cannot be delivered through traditional OOH.

For example, advertisers can reduce wastage and maximise campaign effectiveness by harnessing trigger-based buying to quickly react to what is happening in the outside world in real-time. Furthermore, the ability to trigger or target based on contextual data (e.g. weather, location, demographic data nearby) provides brands with certainty that their messaging will have maximum contextual relevance to deliver results.



“Programmatic DOOH is a new form of outdoor advertising that is based on offline media resources and incorporates digital technology or programmatic tools. It has both offline media resource properties and online programmatic functions. Its advantages are reflected in both aspects, as it has the characteristics of outdoor advertising that are difficult to skip or block, and can also achieve a certain degree of precise communication based on programmatic technology”

New Media Researcher
Well-known University in Beijing

“Programmatic DOOH can improve the efficiency and precision of outdoor advertising, creating more scenarios and opportunities through higher precision and reach of outdoor advertising. Therefore, I think that the trend of empowering traditional media forms with programmatic and digital technology is growing”

Global Media Director
Fortune 500 Consumer Electronics Company

“Programmatic DOOH can be purchased based on self-set conditions and audience touchpoints, such as displaying ads during certain weather or sports events, even triggering playback for the majority of people in a specific location based on real-time audience data or spreading the message according to a specific store location. It brings the content closer to the audience and is very flexible”

Assistant President
Leading Overseas Media Agency



"I personally prefer programmatic DOOH because it can choose to target audiences based on multi-dimensional data sources such as daily market performance or real-time hot news. This type of data enables high brand compatibility, achieving precise targeting of the target audience"

Assistant President
Leading Overseas Media Agency

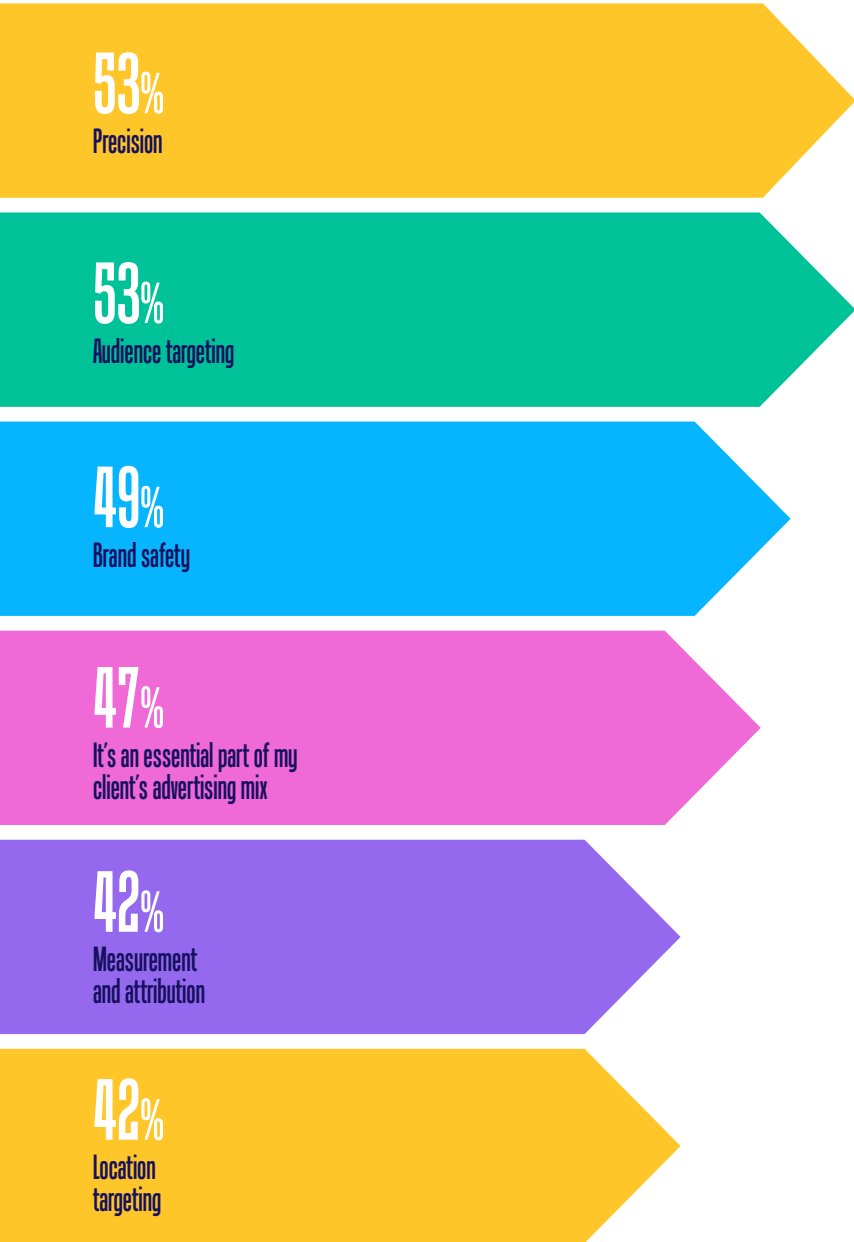
"Programmatic DOOH advertising can help us achieve cost optimisation, with higher budget flexibility and relatively lower cost of reaching the audience. In this context, even small-budget marketing campaigns can bring high exposure based on location selection and can better match retail strategies"

Global Media Director
Fortune 500 Consumer Electronics Company

For media professionals who will increase their budget for programmatic DOOH, the majority stated that they did so because this media has high precision, can match target audiences, and ensure brand safety, while also being an integral part of the media mix. In addition, some media professionals stated that programmatic DOOH has excellent measurement and attribution possibilities, and can match target scenarios offline.

You mentioned that you were looking to increase spend for the following in 2023, what are the main reasons for this growth?

3



Base size: all increasing programmatic DOOH (46)



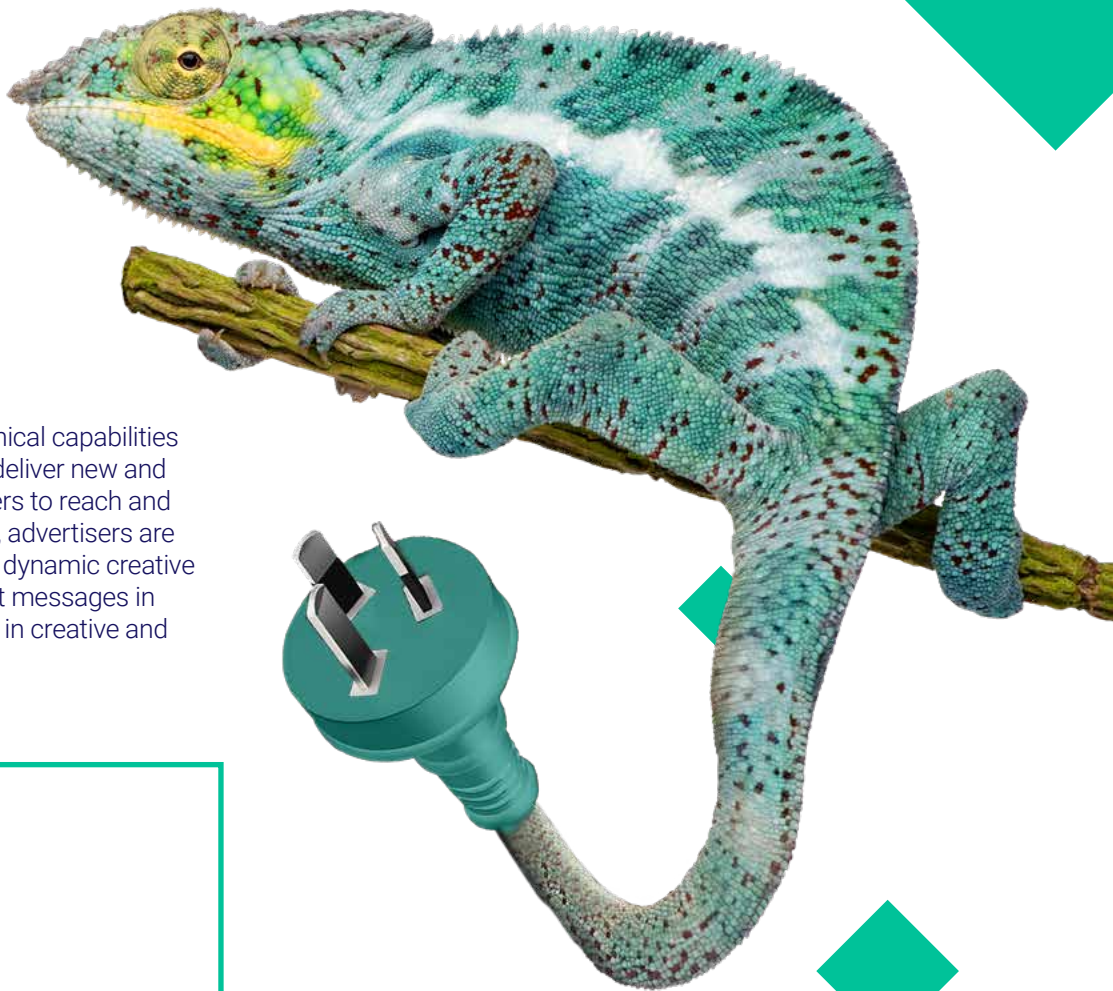
"The most significant advantage of programmatic DOOH is its deep connection with the audience. With the arrival of the video and fragmented era, everyone's attention span for information will become shorter and shorter. Programmatic DOOH knows how to better attract audience attention"

Assistant President
Leading Overseas Media Agency

"Programmatic DOOH primarily aims to enhance the efficiency and precision of outdoor advertising, creating more scenarios and opportunities through higher precision and reach of outdoor advertising"

Global Media Director
Fortune 500 Consumer Electronics Company

Although the development of programmatic DOOH in the mainland China market is at an early stage, a considerable number of media professionals who state they will increase budget for programmatic DOOH will do so because they believe that "the performance of measurement and attribution is excellent". This indicates that advertisers and agencies who are familiar with programmatic DOOH have affirmed the effectiveness of this channel, but the measurement and attribution methods have not been widespread, and there is a lack of a credible evaluation system.



Moreover, advancements in the technical capabilities of programmatic DOOH continue to deliver new and innovative opportunities for advertisers to reach and engage with audiences. For example, advertisers are taking advantage of the ability to use dynamic creative (e.g. 3D, video, etc.) to deliver relevant messages in real-time and engage with audiences in creative and meaningful ways.



"I personally have high expectations for the presentation of 3D video materials in programmatic DOOH, which is lacking in traditional OOH. It will be more attractive and memorable for the audience, which will greatly enhance the effectiveness of communication. It will also attract advertisers to increase their budgets"

Assistant President
Leading Overseas Media Agency

"After digitisation, especially with the development of artificial intelligence technology, virtual reality, and augmented reality technology, programmatic DOOH has a lot of opportunities to grow by partnering with these technologies. Overall, it ushers in a new era for OOH"

Professor of Marketing
Well-Known University in Shanghai

"It ushers in a new era of OOH"

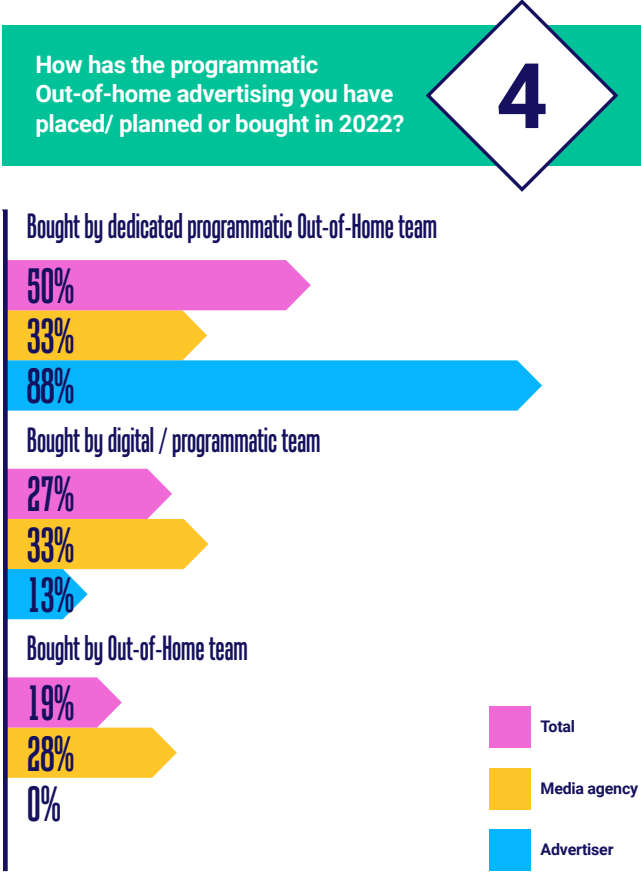
Programmatic DOOH as part of the omni-channel media mix



Today, it is standard practice for advertisers to take an omni-channel approach when planning and buying programmatic campaigns, and this is now extending to include digital out-of-home.

Buying programmatic DOOH alongside other programmatic channels delivers a range of benefits to advertisers. An integrated, omni-channel approach provides advertisers with access to the same audience across multiple touchpoints, enabling them to reinforce campaign messaging and build frequency. In the same way, a single view of a campaign enables advertisers to manage frequency capping, as they are able to monitor campaign exposure and turn different channel activations on and off as needed.

Programmatic OOH is still an emerging medium in the mainland China market, and half of the media professionals are planning and buying through specialized programmatic OOH teams, who have not been fully integrated into the entire programmatic process. This is more evident in advertisers than media agencies.



Base size: all who placed programmatic DOOH in 2012 (26)



“The cognitive process of programmatic DOOH is first completed via consumer awareness through OOH, and then reaching consumers again through other forms and channels. This can significantly shorten the advertising chain and shorten the conversion path, thus improving advertising effectiveness”

Assistant President
Leading Overseas Media Agency

“With the development of programmatic technology, programmatic DOOH can achieve higher precision. Brands can rotate creatives to increase conversion at high performing locations. Programmatic DOOH can utilize dynamic creatives and real-time data to increase relevancy and conversion”

Professor of Marketing
Well-Known University in Shanghai

“Programmatic digital outdoor media can be used as a good awareness channel. For example, it can be introduced in the early stage of large-scale exposure, and then in the secondary marketing, the audience of programmatic digital outdoor media can be matched with other online channels to carry out re-marketing or reactivation”

Assistant President
Leading Overseas Media Agency



***Programmatic DOOH
has greatly shortened
the conversion path***



Programmatic DOOH has strategic significance for both performance and brand-led campaigns. Among the media professionals who have placed DOOH in 2022, 60% believed it was crucial for performance conversion, and 48% believed it was crucial for brand communication.

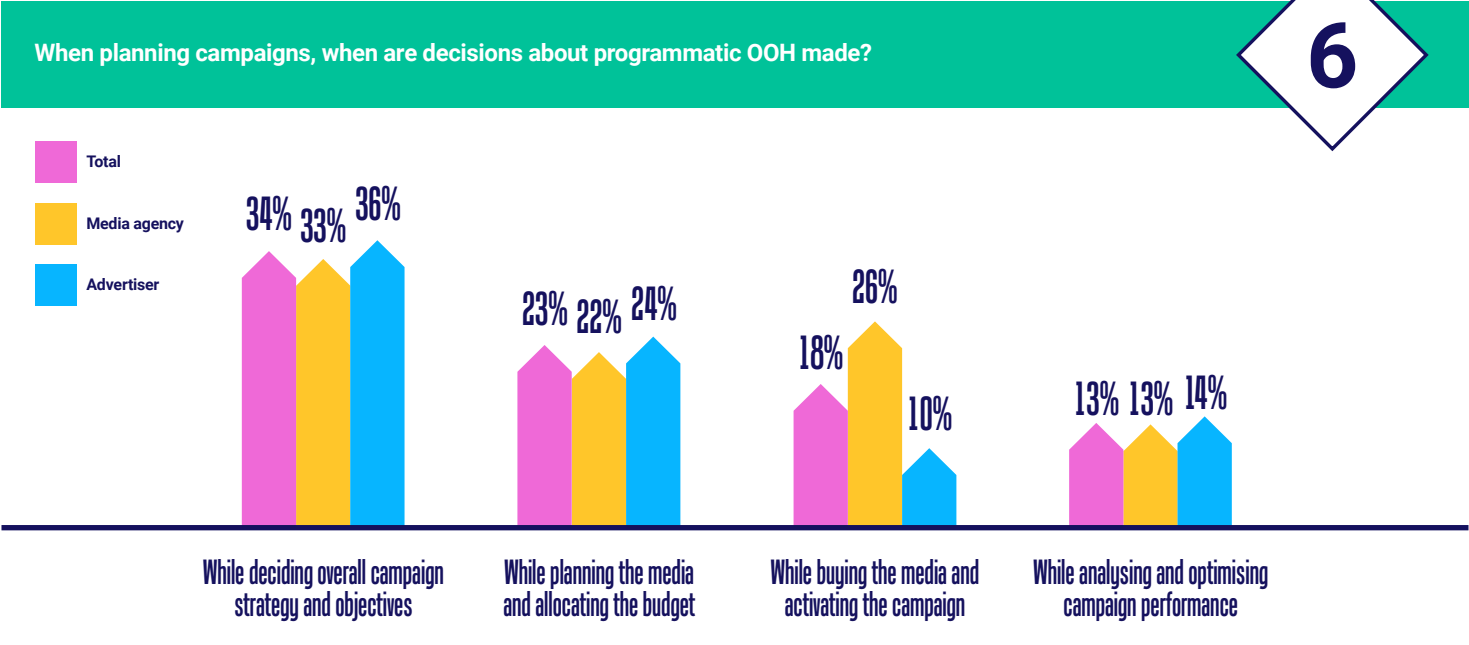


Base size: all respondents (105)
Note: The ranking is based on the sum of percentage of performance and brand

Whether in achieving the goals of branding or performance, most advertisers consider social media as the most likely pairing for programmatic DOOH, as a supplement to online channels. Secondly, digital audio and lift/building advertising have outstanding synergistic effects in terms of performance and branding when paired with programmatic DOOH, extending reach.



When planning a campaign, half of the media professionals stated that they would include programmatic DOOH during the early stages of the campaign planning process, **including while deciding the overall campaign strategy and objectives (34%), and while planning the media and allocating the budget (24%).**



Base size: all respondents (105)



"We will develop a specialised programmatic DOOH plan when deciding on the overall marketing campaign, and have tried it through online programmatic suppliers"

Global Media Director
Fortune 500 Consumer Electronics Company

"Brand related decisions are mostly made at the beginning of the year, and the brand owners will take stock of the budget for programmatic DOOH for the year, and develop plans based on the pace of annual promotion, for example, pairing key product launches, major holidays or important promotions, etc"

Assistant President
Leading Overseas Media Agency

Full funnel activation

Based on different campaign goals and requirements, programmatic DOOH can meet advertisers' requirement for both brand and performance.

The empowerment of programmatic extends the comprehensive functions of DOOH, which can achieve different goals from expanding brand awareness, deepening audience engagement, to promoting conversion.



"Usually, brand advertisers can obtain the best exposure and traffic through the exposure intensity of brand products. Performance-led advertisers can use new user data to match other online media for remarketing"

Assistant President
Leading Overseas Media Agency

"The scenarios for choosing brand-led and performance-led goals are different. When deciding programmatic DOOH campaigns for newly launched products, we usually adopt a high-profile strategy that emphasises communication. During the major promotion activities in retail stores, we need to attract offline traffic, communicate promotional policies, and focus on sales-driven campaigns. In such scenarios, programmatic DOOH will be more precise, selecting data such as geographic location and user concentration matching. The creative side will also focus on call-to-action communication, such as in-store gift collection, etc"

Global Media Director
Fortune 500 Consumer Electronics Company





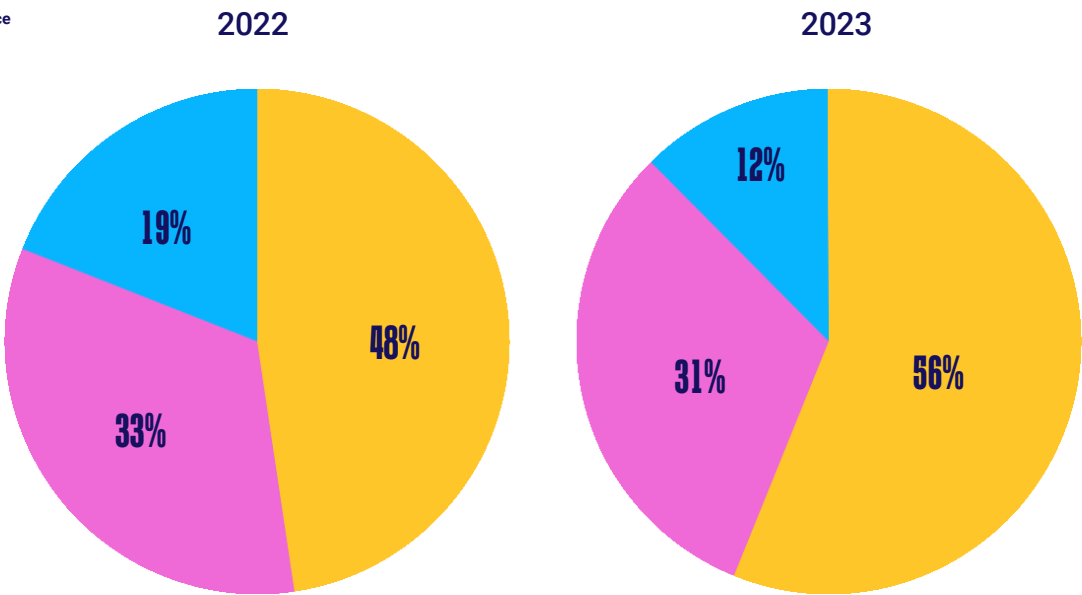
Programmatic DOOH has a role to play for both brand and performance

Although the value of programmatic DOOH in both brand and performance has been validated, advertisers currently place more emphasis on performance-led campaigns, as outlined above. In fact, this also reflects the overall industry trend: in 2022, advertising budgets skewed towards performance spend (48%), and this is expected to continue into 2023 (56%).

How does your company allocate the budget for brand advertising/performance advertising in 2022/2023?

7

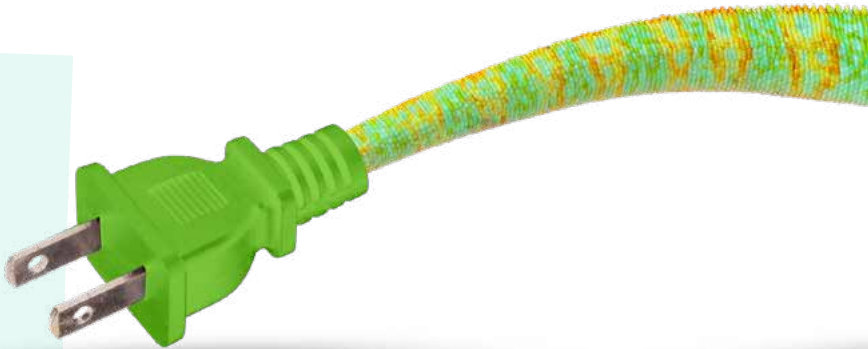
- > 50% performance
- Equal
- > 50% brand



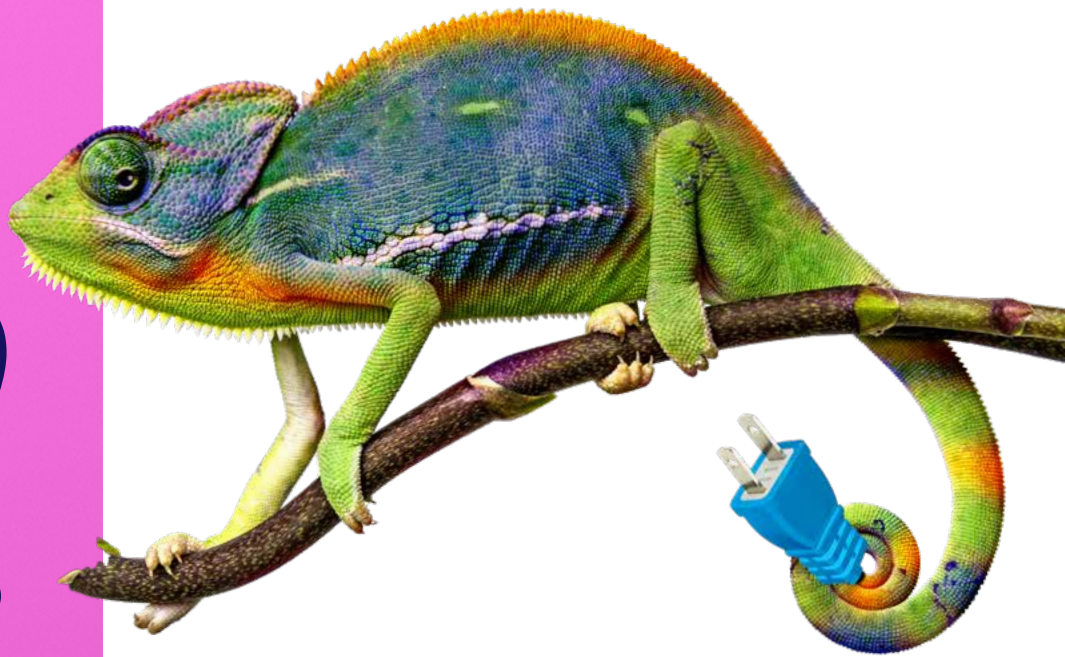
Base size: all respondents (105)

56%

OF ADVERTISING BUDGETS
SKEW TOWARDS
PERFORMANCE SPEND
IN 2023



Defining the new landscape

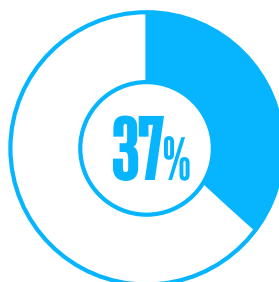


Expected demand for programmatic DOOH

As outlined above, demand for programmatic DOOH is expected to continue to grow. According to research, nearly 40% of campaigns in the mainland China market are expected to include programmatic DOOH this year.

Proportion of campaigns executives have planned, bought or placed programmatic DOOH in 2022 / 2023?

8



2022

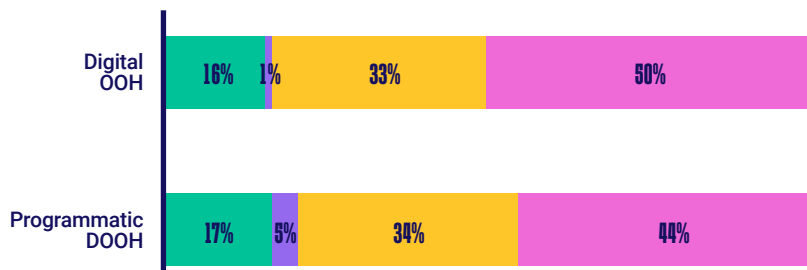


2023

Base size: all respondents (105)

How do you think your advertising investment will change in 2023?

9



Base size: all respondents (105)

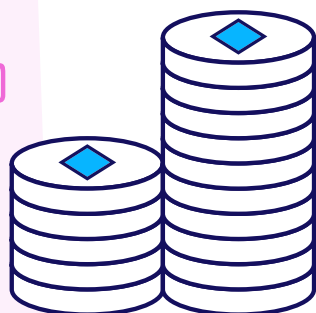


"We will recommend advertisers to adopt this channel in the future"

Assistant President
Leading Overseas Media Agency

44%

NEARLY HALF OF THE MEDIA PROFESSIONALS INDICATED THAT THEY WOULD INCREASE BUDGET FOR PROGRAMMATIC DOOH IN 2023

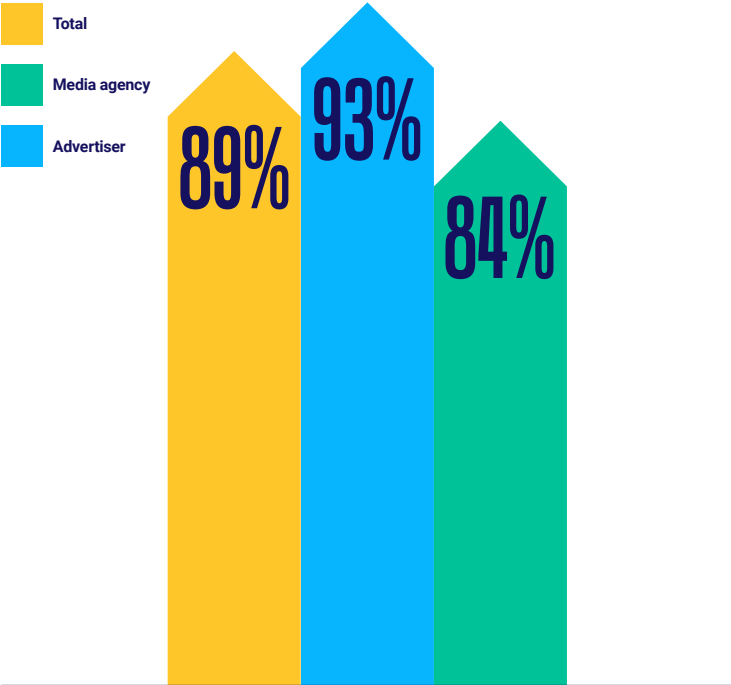


Future investment

Nearly 90% of media professionals agreed with the statement “We will invest in building our programmatic digital Out-of-Home expertise.”

Thinking about how you expect to place programmatic digital out-of-home advertising in 2023, to what extent do you agree or disagree with the following statement.

10



We will invest in building our programmatic digital Out-of-Home expertise

Base size: all respondents (105)



“The first development trend is linking programmatic DOOH to the ‘Smart City’. At present, our country is investing heavily in new infrastructure, i.e., the construction of digital cities, and programmatic DOOH will have a place in it. Our country will focus on advertising investment in this field, which should be one of the important spaces that programmatic DOOH can expand in the future.

The second point is about the construction of city image, which involves building commercial districts and striving to be the first place for global brands. It means that there will be a large number of campaigns and brands here, which gives DOOH a lot of room for development.

The third is related to the construction of commercial districts, parks, or school campuses, who will consider DOOH screens and programmatic trading of the inventory in the future.

Finally, it is based on the brands. Some brands, as advertisers, hope to access their target audience in the right place and at the right time, which involves the dimensions of time and space aggregation. From a marketing research perspective, this is the consumer journey. For specific brands, they will launch campaigns based on the characteristics of the aggregated time and space”

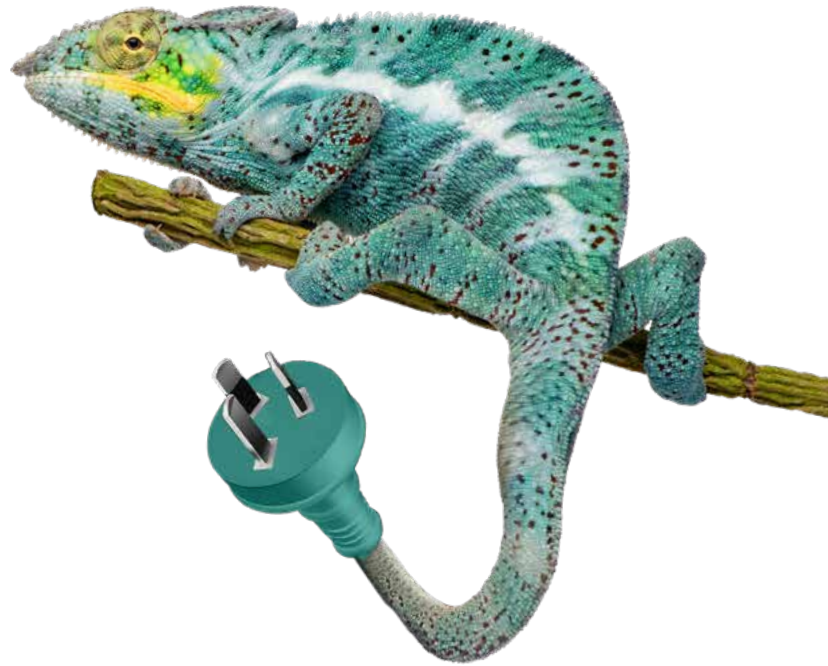
Marketing Professor
Well-known University in Shanghai



Overcoming barriers to adoption

1 More widespread understanding of programmatic DOOH

Given the alignment in planning and buying of programmatic DOOH alongside programmatic buying of other media, it is no surprise that investment in widespread education will unlock further spend in the channel by helping advertisers and agencies to better understand the key benefits of programmatic DOOH, and enabling them, in turn, to communicate those benefits to clients and teams.



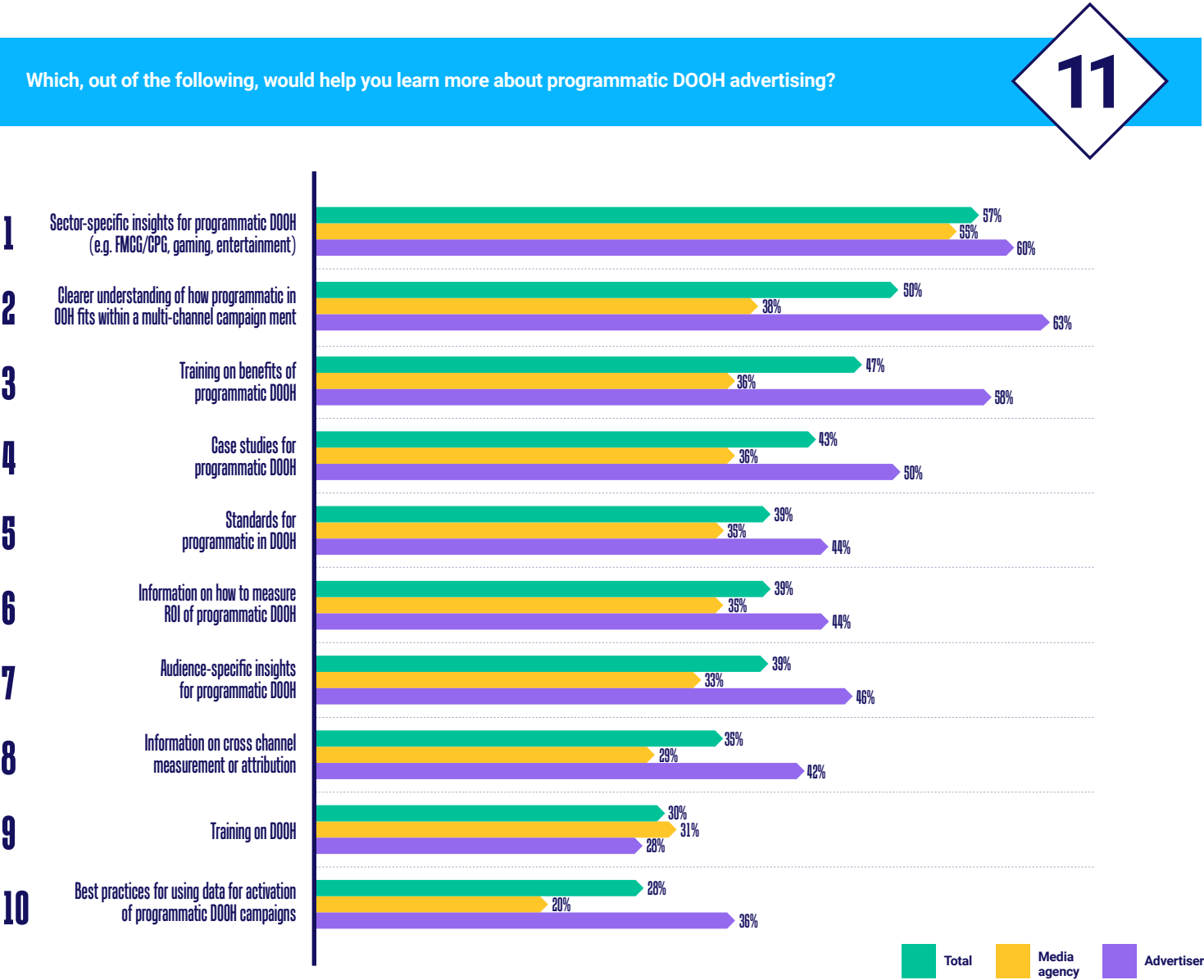
Nearly 60% of media professionals believe that gaining insights into programmatic DOOH in different segmented industries can help them better understand its application. The second most important factor is to understand the synergies of programmatic DOOH in the overall domain, followed by training on its advantages.

Compared to the international market's demand for practical aspects, the mainland China market is more focused on the foundational understanding of programmatic DOOH.

As a relatively new way of buying DOOH, the industry is still deepening its knowledge and understanding of programmatic DOOH. Currently, the industry tends to explore programmatic DOOH through basic aspects such as insights, training, and case studies, which also indicates that this channel is still new to most practitioners, and is still in its infancy in China.

In the international market, media professionals tend to complement education on programmatic with more granular aspects such as the use of data, ROI indicators, and cross-channel attribution.

It is noteworthy that advertisers in the mainland China market have a significantly higher need for understanding programmatic DOOH than agencies. On the one hand, this reflects that brands, as direct beneficiaries, urgently need to understand the impact of new technologies on their business. On the other hand, it also reflects that advertisers have a relatively insufficient understanding of the application of programmatic DOOH.



Base size: all respondents (105)



“Some benefits of programmatic DOOH are not yet well communicated to most advertisers. Currently, larger brand advertisers may use it more often. I personally suggest expanding its publicity to attract more brands at different stages of development”

Assistant Vice President
Leading Overseas Media Agency

“There may be some questions for brand owners: How should they consider the upstream and downstream of programmatic DOOH? Whether programmatic DOOH is bought through specialist agencies or technology such as DSPs?”

Global Media Director
Fortune 500 Consumer Electronics Company

“After years of development, current online or digital advertising has achieved certain results in terms of placement models, communication channels, platform construction, and has initially formed a feasible regulatory system. However, programmatic DOOH is relatively later than online or digital advertising, which makes the current advertising strategy in this field not clear enough, and there is still room for improvement in common modes, channels, platforms, and other aspects”

New Media Researcher
Well-known University in Beijing





2 Evaluating advertising impact

At present, the adoption of programmatic DOOH in China is in its early stage, and most advertisers are still in testing phase.

Many feel they would better understand the effectiveness of programmatic if they had a set of widely accepted, robust metrics that celebrated key successes of programmatic DOOH.



Firstly, the functionality and usefulness of programmatic DOOH needs to be further communicated to advertisers and consumers. Only once the advertisers are comfortable with the technology, then different creatives can be used to generate emotional responses from consumers.



“Programmatic DOOH is more of a novelty for us and has not yet become a fixed strategy. In the future, its logic in terms of exposure will be clearer, but from the perspective of effectiveness, its measurement methods have not yet reached parity with digital programmatic”

Global Media Director
Fortune 500 Consumer Electronics Company

At present, programmatic DOOH still faces many problems, for example, ‘How to accurately measure the ROI of programmatic DOOH campaigns?’”

New Media Researcher
Well-known University in Beijing.

“I think that the market education for programmatic DOOH still needs to be improved. For example, what kind of targeting can I achieve? Compared with the advantages of online channels, where we have already used hundreds or thousands of targeting methods, what are the standard targeting capabilities or precision capabilities that programmatic DOOH can achieve?”

Global Media Director
Fortune 500 Consumer Electronics Company

3 Measurement and data granularity

Nearly 60% of media professionals believe that in order to increase their perceived value of programmatic DOOH, they need “more tangible indicators that prove the value of the channel”.

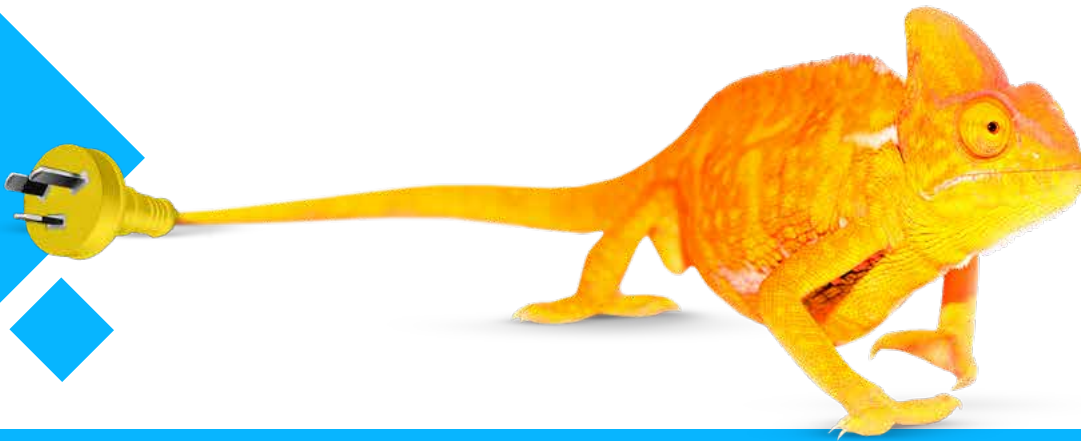
Secondly, half of all media professionals want “more options around precision / targeting of the campaigns in the market”.

Nearly half of the media professionals also need “more behavioural / visitation / mobility data”, i.e., insights into the consumer journey, to have a clearer understanding of the role of programmatic DOOH.

These three factors are all basic information for programmatic DOOH in the planning stage, indicating that the application of programmatic DOOH is still in the exploratory stage in the current mainland China market. The industry urgently needs to strengthen the popularization and education of related technologies.

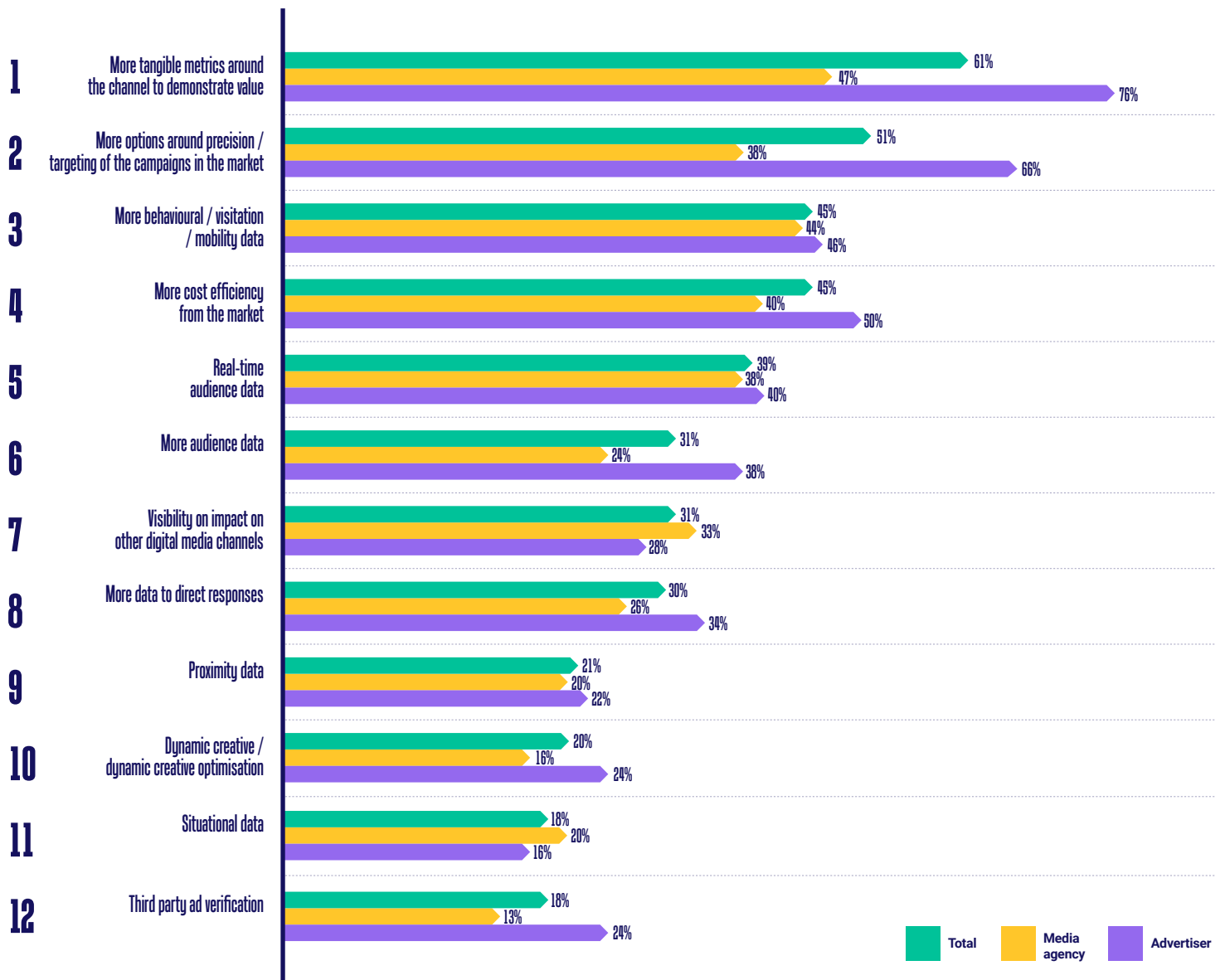
Data granularity is a vital indicator





Which of the following would you like to see in order to give programmatic digital out-of-home campaigns more value and make you invest more?

12

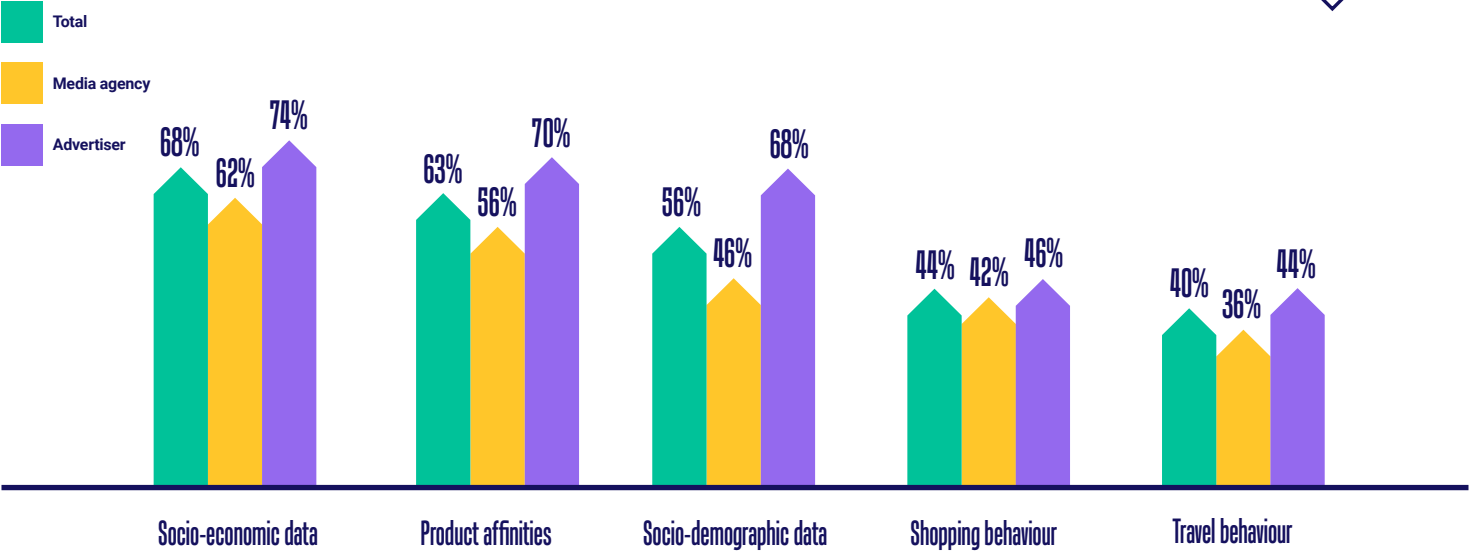


Base size: all respondents (105)

Target audience data is seen as the most valuable indicator for the industry. Nearly 70% of media professionals want socio-economic data, 60% were concerned about the product affinities between the target audience and their own products, and nearly 60% were interested in socio-demographic data.

Which of the following types of audience data would be most useful in targeting programmatic digital out-of-home campaigns?

13



Base size: all respondents (105)



"In addition to basic demographic data, audience targeting and even judgment on purchasing intention are also needed. Moreover, the ability to achieve more accurate geographical targeting data, or to transfer all online targeting capabilities to outdoor media is also crucial"

Global Media Director
Fortune 500 Consumer Electronics Company

74%
OF MEDIA EXECUTIVES SAY
THAT SOCIO-ECONOMIC DATA
IS THE MOST USEFUL AUDIENCE
TARGETING DATA

Summary



Research shows that the development of programmatic DOOH in the mainland China market is still in its early stages, yet the future for programmatic DOOH looks bright as the industry is actively testing. Although the current adoption of programmatic DOOH is less than 25%, this proportion is expected to grow rapidly to over 30% by the end of 2023.

In response to the predicted surge in demand for programmatic DOOH, both agencies and advertisers are actively investing in developing relevant internal expertise systems to fully utilise the advantages of programmatic DOOH.

At present, the industry lacks education and wide-spread knowledge of programmatic DOOH. Agencies and advertisers are eager to obtain more relevant data, indicators, insights, and case studies to confirm the effectiveness of this media in the mainland China and promote the success of relevant advertising decisions.

In short, with the improvement of relevant facilities, technologies, indicators and other elements, programmatic DOOH is sure to take its place as a mainstay on programmatic campaigns.



Programmatic OOH will become a mainstay



With the rapid recovery of the audience volume in outdoor settings, the necessity of OOH is becoming increasingly prominent; At the same time, advertisers' strong demand for precision and flexibility has also made buying DOOH programmatically an inevitable trend. Programmatic DOOH therefore holds an important strategic position.

In the brand's omni-channel marketing strategy, outdoor touchpoints, as an important part of consumer journey, have an irreplaceable position and advantage. The empowerment of digitisation and programmatic also makes the display of outdoor media more flexible, precise, and cost-effective.

In terms of goal attainment, programmatic DOOH can achieve the brand's full funnel objectives based on specific needs. Whether it is achieving branding or performance goals, its synergy with other digital channels including social media, digital audio, lift/building ads, etc. has also been confirmed.

Finally, with the increasing demand for programmatic DOOH in the mainland China market, it is becoming increasingly important to offer necessary data indicators and measurement. As an emerging media channel, the industry also looks forward to further market validation to strengthen the adoption of programmatic digital media.

About us



VIOOH

VIOOH is a leading premium global digital out of home supply side platform. Launched in 2018 and with headquarters in London, VIOOH's platform connects buyers and sellers in a premium marketplace, making OOH easily accessible.

Led by a team of digital OOH and programmatic tech experts, VIOOH is pioneering the transformation of the OOH sector, championing its role in enhancing omni-channel digital campaigns through the use of programmatic capabilities and data. VIOOH currently trades programmatically in 19 markets, with more to follow.

Morketing RESEARCH

Morketing Research is the industry analysis and consulting brand of Morketing, which deeply connected to the high-quality industry resources of Marketing's i-Bank. Based on a rigorous and scientific research system, objective and dialectical research attitude, Morketing Research is committed to providing research reports, ecomaps, industry rankings, consulting analysis, business research, training courses, livestreaming and other services for the pan marketing business field.

Morketing Research's mission is to help marketing business practitioners to gain insight into the industry's development context, seize growth opportunities, and promote the sustainable development of the digital marketing industry.