

STATE OF THE
NATION

Programmatic DOOH 2025



VIOOH

Mainland China market highlights



Marketing
RESEARCH

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Executive Summary

By analysing 2025 Mainland China research findings, with longitudinal comparisons to the “[Programmatic DOOH 2023 - State of the Nation Mainland China](#)” report and cross-market benchmarks against [VIOOH’s global data](#), this report identifies the following market highlights:

- ◆ **Insight 1:** Chinese advertisers are currently facing a significant challenge in improving the efficiency of their brand communication. On one hand, online traffic has peaked, leading to increased customer acquisition costs. On the other hand, the resurgence of offline consumption has enhanced the marketing value of OOH media. As a result, brands are prioritising the development of high-impact media channels that can effectively reach consumers. This has led to a growing demand for programmatic digital out-of-home (pDOOH) advertising in the Chinese market. In the 2025 survey, the number of respondents who have deployed pDOOH in the past 12 months increased from 24% (2023 result) to 30%; in the next 12 months, respondents who plan to deploy pDOOH will further increase to 32%. As the adoption rate of pDOOH continues to grow, China’s marketers will enter a more refined and professional stage of deployment for pDOOH investment.
- ◆ **Insight 2:** pDOOH has become integral to omni-channel marketing, typically deployed alongside four dominant media: social media ads, digital audio, mobile ads, and CTV. The market has developed distinct media mix patterns based on campaign objectives. It often pairs with in-app ads (29%) and search ads (29%) in performance-driven campaigns to enhance conversion impact, while showing stronger synergy with traditional OOH (27%) and display advertising (26%) in brand-building campaigns to amplify brand presence.
- ◆ **Insight 3:** pDOOH demonstrates five distinctive value propositions that are particularly recognised in the Mainland China market: (1) Generating return on investment (52%), (2) Increasing sales/performance (48%), (3) Flexibility/efficiency to display when the right conditions are met (48%), (4) Ability to activate last minute media buys (45%), and (5) Ensuring brand safety, including lack of bot/click fraud (39%).
- ◆ **Insight 4:** Throughout all campaign process, the data granularity is still the core indicator that affects pDOOH placement decisions. For example, target market data, real and specific measurement capabilities, and attribution capabilities have a great impact on whether decision makers are willing to place pDOOH, and may be a key factor in determining the industry’s development potential and upper limit.
- ◆ **Insight 5:** The emergence of Dynamic Creative Optimisation (DCO) technology may become a fuel for the further growth of pDOOH in the domestic market. Among the respondents who have placed pDOOH in 2024, 42% said they would consider using DCO in the future.

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Programmatic DOOH 2025

| INTRODUCTION



GLOBAL MARKET OVERVIEW

Programmatic OOH combines the strengths of Digital Out-of-Home (DOOH) and programmatic advertising, enabling real-time content matching and dynamic delivery through data-driven strategies. This not only enhances operational efficiency but also ensures deeper alignment between ad content and consumer contexts.

Programmatic DOOH has become a critical component of cross-screen marketing. Key developments across core pDOOH markets - the UK, France, Germany, the U.S. and Australia - in 2024 reveal the following trends:

The overall adoption rate of pDOOH continues to increase, becoming an indispensable visual focus in daily life in the core global markets. In 2024, pDOOH adoption is projected to grow from 27% to 35% within 18 months, with a 28% budget increase forecasted by senior industry professionals with budgetary responsibilities.

pDOOH is widely applicable to different advertising activities, and its flexibility demonstrates diverse communication functions. High adoption among advertisers in transportation, retail, entertainment, and tourism; used in 85% of brand-driven campaigns and 91% of performance-driven campaigns.

Meanwhile, the pDOOH global market is flourishing in many places and shows explosive potential in early-stage markets like Nordics: 99% of Nordic marketers plan pDOOH investments within 12 months, surpassing global averages and outperforming social media (94%) and direct-bought DOOH (91%).

Looking at the global market, the rapid growth of pDOOH is fuelled by the following factors.



Flexible budget control:

Programmatic buying enables advertisers to dynamically adjust reach frequency and target audiences on demand. This optimisation not only reduces excessive frequency but also delivers more agile budget management.



Hyper-targeting capabilities:

By integrating factors such as user location, weather, holidays, and commute patterns, pDOOH can effectively reach targeted audiences within a dynamically changing external environment, thereby maximising the coverage of the intended demographic. Furthermore, the industry is committed to continuously broadening the data dimensions of pDOOH and its ability to accurately target the right audience with suitable creatives, and to increase sales conversion in offline environments will be further upgraded.



High adaptability of omni-channel integrated marketing:

pDOOH combines the advantages of wide coverage and strong visual output of OOH with the audience targeting, flexibility, and controllability of programmatic advertising. It can partner with various channels such as social media, connected TV, audio, etc., and is therefore well suited for both performance-led and branding-led campaigns.



Sustainability & compliance:

Due to its one-to-many broadcast nature of pDOOH versus one-to-one media, pDOOH significantly reduces carbon emissions generated by media campaigns - as audience impressions and reach increase in OOH/DOOH using an impression multiplier, emissions intensity is reduced. Data from 2023 indicates that VIOOH's pDOOH has a carbon emission efficiency that is more than 10x efficient compared with programmatic display, and more than 13x efficient compared with programmatic video¹. Additionally, pDOOH adheres to international privacy compliance standards, including PIPL, GDPR, and CCPA, ensuring the security of consumer data.

Research Background

As the Internet traffic growth plateaus and online customer acquisition costs rise, China's advertising market has entered a new phase of "Red Ocean" and "Contextual-based Operation".

In 2024, with the rapid adoption of generative AI and spatial computing, user attention has become more fragmented, intensifying advertisers' demand for omni-channel reach efficiency and contextual-based engagement.

On the advertiser side, creating offline experiential scenarios has become an imperative for brand building.

On the consumer side, while relying on convenient online services, there is also growing demand for the immediacy and immersion of offline experiences.

Under these converging trends, out-of-home media is undergoing a fundamental transformation, evolving from traditional exposure channels to performance-branding experience platforms, making the synergy between brand building and performance growth increasingly critical.

In this context, the programmatic digital out-of-home (pDOOH) advertising industry is undergoing a triple transformation—innovating trading models, upgrading contextual creativity, and advancing measurement frameworks—meeting advertisers' demands for real-time responsiveness, dynamic optimisation and performance quantification.

To provide an in-depth analysis of pDOOH's current landscape and future trends in Mainland China, VIOOH partnered with Marketing Research Institute in April-May 2025 to survey 150 advertisers and agencies in Mainland China via online questionnaires, covering budget planning, technology adoption, campaign challenges, and other key aspects. In-depth interviews with brand executives and academic experts have also been done to analyse pDOOH cases and strategic value.

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Programmatic DOOH 2025

A STEADY, STABLE YET CAUTIOUSLY EXPANDING CHINESE MARKET



01. Current Adoption Status Among Advertisers

◆ Sustained Growth & Rational Expectations

In 2025, 30% of respondents in the Chinese market said that their companies had already deployed pDOOH.



Compared with the survey results in 2023 (24%), the adoption rate of pDOOH in the domestic market has increased significantly. This demonstrates that pDOOH's growing adoption in China is catching up with global key markets.

Notably, while 24% of China advertisers currently use pDOOH, the adoption rate among media agencies reaches 36%². This may stem from advertisers' "Lack of understanding of programmatic DOOH capabilities and technology"³(53%)³.



In the upcoming year, pDOOH is expected to rank 4th among 14 major media channels for planned investments, with a 32% share⁴. This marks an improvement from its 6th-place ranking two years ago. This increase signifies a growing acceptance of pDOOH in the Chinese advertising market. As pDOOH continues to develop steadily in China, the industry may transition into a more sophisticated deployment phase that focuses on achieving tangible advertising effects and return on investment.

* 2 A8: Which of the following media have you placed, planned or bought advertising for in the last 12 months?

* 3 C15: Which of the following, if any, are preventing you from adopting more programmatic digital out-of-home campaigns in your media plan?

* 4 A9: Which of the following media are you planning to, or open to advertising for in the next 12 months?

An intriguing trend is that while social media ads remain China’s long-standing champion, **three OOH formats now dominate the 2nd to 4th spots** in 2025 plans. This ranking shift substantiates two critical market developments: first, online advertising channels are approaching penetration limits with intensifying competition, prompting advertisers to explore offline alternatives; second, the resurgence of offline media will undoubtedly become a tailwind for pDOOH’s future growth.



“As consumers grow weary of online ad clichés, personalised, heartwarming, and playful pDOOH campaigns—amplified through online-offline synergy—are showcasing unique vitality.”

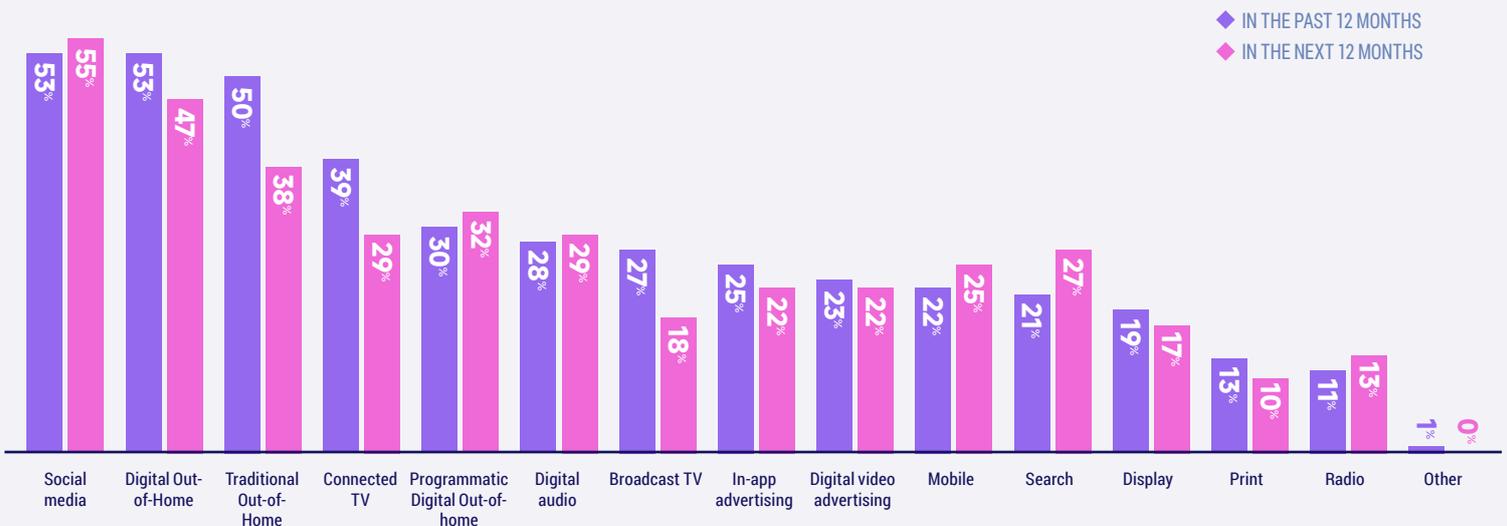
Wang Shui, Dean of School of Culture and Communication, Capital University of Economics and Business



“pDOOH combines the broad reach of traditional OOH with the precision targeting of digital ads, theoretically achieving accurate matching of audience, content, and context. Over the past two years, brands in automotive, Internet, and FMCG have notably shifted OOH budgets to pDOOH.”

Terry Lin, Senior Media Director, McDonald's China

WHICH OF THE FOLLOWING MEDIA HAVE YOU PLANNED OR BOUGHT ADVERTISING FOR IN THE LAST 12 MONTHS? / WHICH OF THE FOLLOWING MEDIA ARE YOU PLANNING TO, OR OPEN TO PLACING, PLANNING OR BUYING ADVERTISING FOR IN THE NEXT 12 MONTHS?



* Source: A8&9 Base size: all respondents (150)

◆ Striving for Synergy and Stable Purchasing

This year's report shows that over 60% of respondents chose "Bought by digital/programmatic team" (64%), followed by "Bought by dedicated programmatic Out-of-Home team" (58%) and "Bought by Out-of-Home team" (38%)⁵. This marks a significant shift from the 2023 result, when only 27% opted for "Bought by digital/programmatic team".

This indicates that in the Chinese market, pDOOH, as a programmatic medium, is being increasingly procured as part of an omnichannel strategy, enabling better synergy with other digital and programmatic media. Such a systematic approach helps advertisers optimise audience reach efficiency and, to some extent, reduce advertising costs.

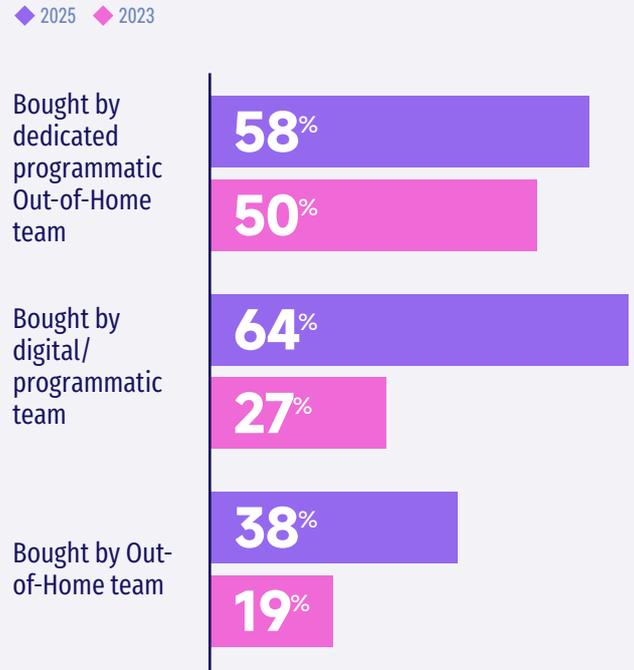
When it comes to purchasing methods, 67% of respondents' companies opted for "programmatic guaranteed (PG)", aligning with trends in key global markets⁶. There are three main reasons for this choice. Firstly, domestic marketers prefer to reserve and guarantee inventory for their campaigns, as it simplifies budget approval and auditing processes. Secondly, in the realm of mobile programmatic trading, Programmatic Direct Buy (PDB) is the dominant trading type, which is a form of PG. Lastly, there is a lack of third-party data available for making trading decisions, such as pricing and volume based on impression or ID level. Overall, this scenario reflects the prevailing mindset among marketers who seek high stability and guaranteed outcomes when launching pDOOH campaigns.

◆◆

"Programmatic guaranteed is more common partly because advertisers find it relatively harder to scale up online, so when it comes to offline brand exposure in the upper funnel, they tend to opt for guaranteed placements."

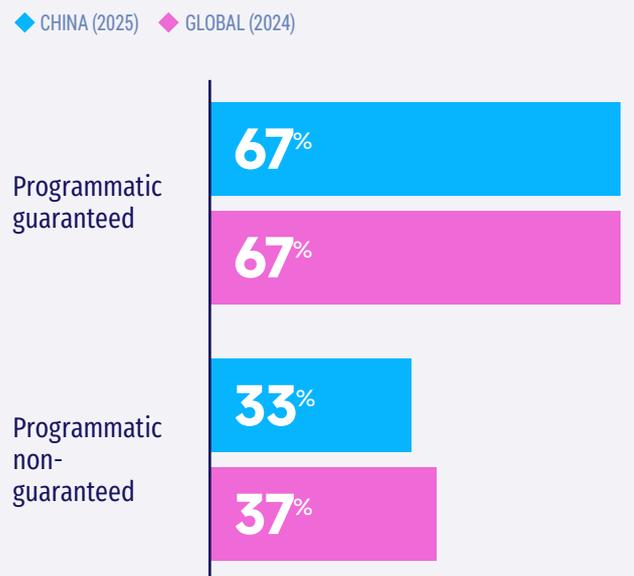
Wang Shui, Dean of School of Culture and Communication, Capital University of Economics and Business

HOW HAS THE pDOOH YOU HAVE PLACED IN THE LAST 12 MONTHS TYPICALLY BEEN BOUGHT?



* Source: C3 Base size: respondents who have placed pDOOH in the past 12 months (45)

OF THE FOLLOWING METHODS, WHICH ARE YOUR MOST PREFERRED WAY(S) TO BUY PROGRAMMATIC ADVERTISING?



* Source: B10 Base size: respondents who placed pDOOH (45). Please note that totals do not equal 100% since there are two other options for PMP and Open Exchange.

⁵ C3 How has the pDOOH you have placed in the last 12 months typically been bought?

⁶ B10 Of the following methods, which are your most preferred way(s) to buy programmatic advertising?

◆ Diverse Budget Sources, Channels Demonstrate Competitiveness

In 2025, 42% of respondents plan to allocate a dedicated advertising budget for pDOOH, marking a significant increase from 33% two years prior. This trend indicates that marketers are increasingly recognising the ROI and overall value of pDOOH through their recent practices and are continuing to invest more in this advertising channel.

At the same time, marketers are also accustomed to transferring budgets from other digital channels (58%) or other traditional channels (59%) to pDOOH⁷. It can be seen that in the Chinese market, pDOOH is evolving from a "supplementary media" to an advertising media channel that cannot be overlooked.



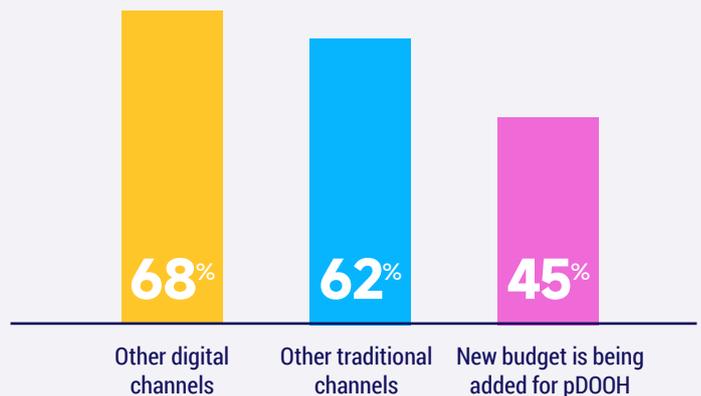
“Today, advertisers no longer allocate budgets with strict proportional divisions as before. Instead, they compare and discuss within an entire budget pool. Most of the time, advertisers aren’t comparing pDOOH with traditional OOH but rather with various digital formats like feed ads and search ads to validate its rationality and advantages.”

Wang Shui, Dean of School of Culture and Communication, Capital University of Economics and Business

To some extent, this trend signifies that in the Chinese market, pDOOH is beginning to compete head-to-head with core media channels within a unified budget pool, securing its place in the omni-channel advertising ecosystem.

IF BUDGET IS GOING TO BE INCREASED FOR PROGRAMMATIC DIGITAL OUT-OF-HOME, WHERE IS THIS BUDGET BEING MOVED FROM?

- ◆ OTHER DIGITAL CHANNELS
- ◆ OTHER TRADITIONAL CHANNELS
- ◆ NEW BUDGET IS BEING ADDED FOR pDOOH



* Source: C5 Base size: respondents who will increase the budget for pDOOH (85)

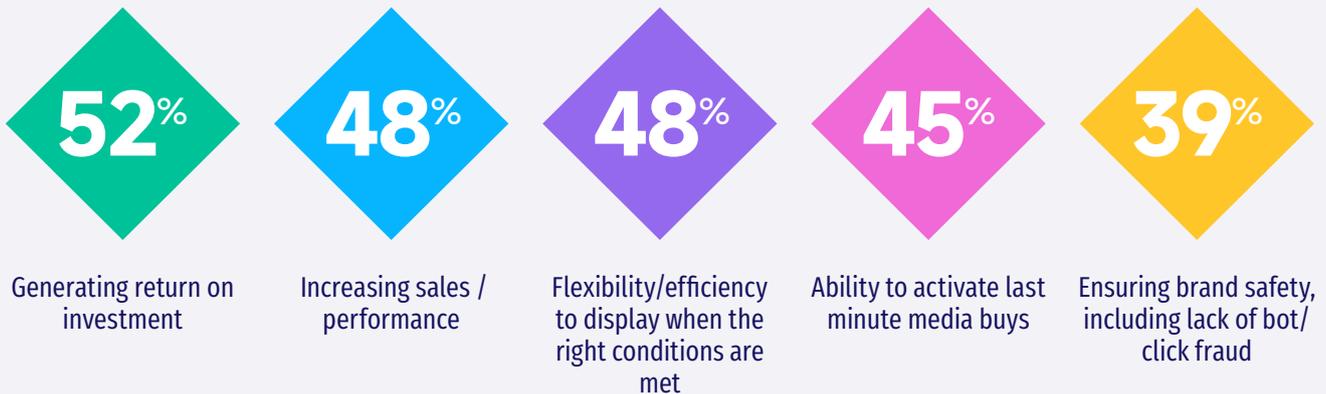
* 7 C5 If budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?

02. Five Benefits of pDOOH

In the Chinese market, pDOOH is perceived to offer superior value in five aspects: “Generating return on investment”, “Increasing sales/performance”, “Flexibility/efficiency to display when the right conditions are met”, “Ability to activate last minute media buys”, “Ensuring brand safety, including lack of bot/click fraud”.

Among these, “Generating return on investment” stands out as pDOOH’s most prominent benefit, which to some extent validates the earlier observation that the advertisers add new budget toward pDOOH is largely driven by the pursuit of higher returns⁸.

BENEFITS OF pDOOH



* Source: B1 Base size: all respondents (150)

03. Overcoming Barriers and Strengthening Awareness

Despite the industry’s upward trajectory, pDOOH in Mainland China still faces certain challenges.

There are two most cited obstacles preventing advertisers and agencies from adopting programmatic DOOH advertising: “Lack of understanding of the role programmatic DOOH should play in a campaign” (49%) and “Concerns around the availability or accuracy of audience data available for programmatic DOOH” (49%)^{*}.

The first issue suggests that, amid various advertising media options, Chinese advertisers remain unclear about pDOOH’s functional value, and its irreplaceability has yet to be established. The second reflects lingering doubts about targeting precision due to pDOOH’s relatively weaker post-campaign tracking capabilities compared to digital one-to-one environments.

This also indicates that clarifying pDOOH’s advertising value and enhancing its data capabilities could help the industry overcome bottlenecks and accelerate growth.



“For pDOOH to develop in China, two key issues must be addressed: data and showcase. First, demonstrating pDOOH’s reach and conversion effectiveness, and second, proving through case studies that pDOOH is a validated advertising model, so as to attract more advertisers to allocate budgets”

Wang Shui, Dean of School of Culture and Communication,
Capital University of Economics and Business

WHICH OF THE FOLLOWING, IF ANY, ARE PREVENTING YOU FROM ADOPTING MORE PROGRAMMATIC DIGITAL OUT-OF-HOME CAMPAIGNS IN YOUR MEDIA PLAN?



Lack of understanding of the role programmatic DOOH should play in a campaign



Concerns around the availability or accuracy of audience data available for programmatic DOOH



Fewer deal options available for programmatic DOOH



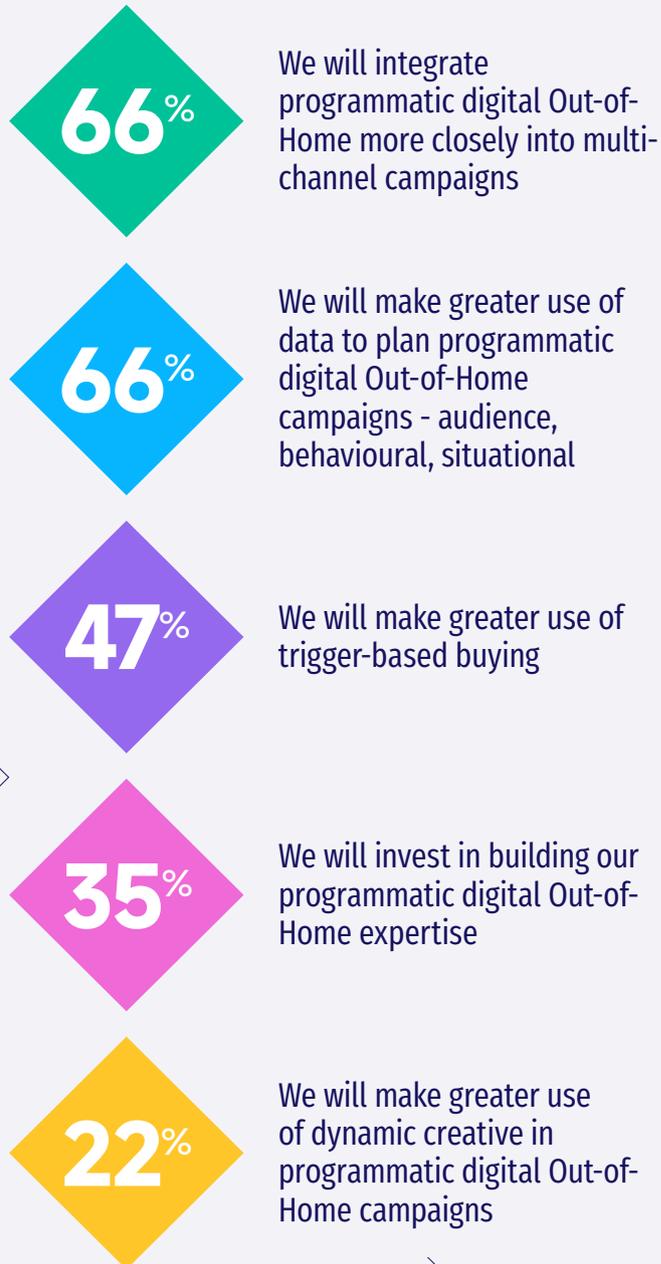
Limited amount of programmatic DOOH inventory in my market



Lack of infrastructure for integrating programmatic DOOH with other channels on our plan

* Source: C15 Base size: all respondents (150)

HOW YOU EXPECT TO PLACE/ PLAN OR BUY PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING IN THE NEXT 18 MONTHS?



* Source: C14 Base size: all respondents (150)

Looking ahead, advertisers and agencies in Mainland China remain proactive in embracing pDOOH. Nearly 70% of respondents agree they will “integrate programmatic digital Out-of-Home more closely into multi-channel campaigns” and a similar proportion plan to “make greater use of data to plan programmatic digital Out-of-Home campaigns”¹⁰.

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FLEXIBLE CHANNEL COMBINATIONS IN OMNI-CHANNEL MARKETING



01. How to integrate pDOOH into Omni-Channel Marketing?

When marketers plan campaigns, they often incorporate pDOOH into an integrated media strategy and use it alongside other advertising formats.

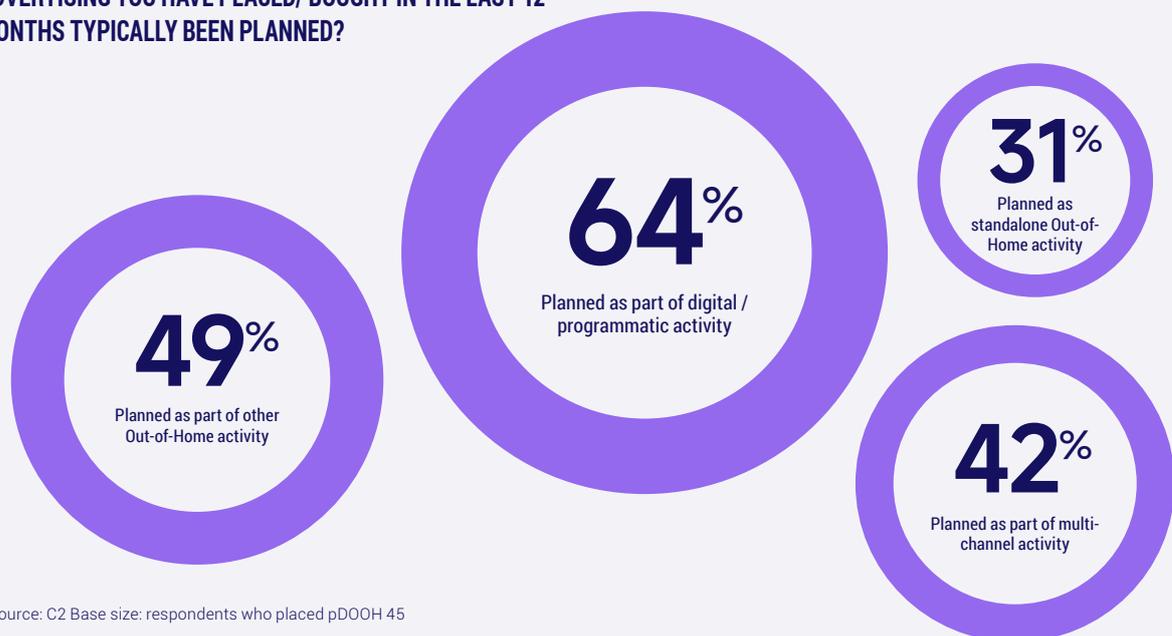
Among marketers who have invested in pDOOH over the past year, only about 30% of respondents deployed it as a standalone advertising channel. In contrast, a larger portion of respondents (64%) prefer to integrate it into their overall digital channel strategy. This indicates that it has gradually developed into an important part of digital campaigns, on par with online advertising such as social media and search advertising; 42% include it in omni-channel campaigns (such as radio, online TV, etc.). This trend shows that pDOOH, as a high-frequency information reception platform in consumers' daily lives, is increasingly crucial for brands aiming to enhance their coverage of the consumer journey¹¹.



“At this stage, while programmatic OOH is not a core resource for Chinese brands, it often serves as a complementary highlight.”

Wang Shui, Dean of School of Culture and Communication, Capital University of Economics and Business

HOW HAS THE PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING YOU HAVE PLACED/ BOUGHT IN THE LAST 12 MONTHS TYPICALLY BEEN PLANNED?



* Source: C2 Base size: respondents who placed pDOOH 45

* 11 C2 How has the pDOOH you have placed/ bought in the last 12 months typically been planned?

02. How can pDOOH help achieve brand and performance goals?

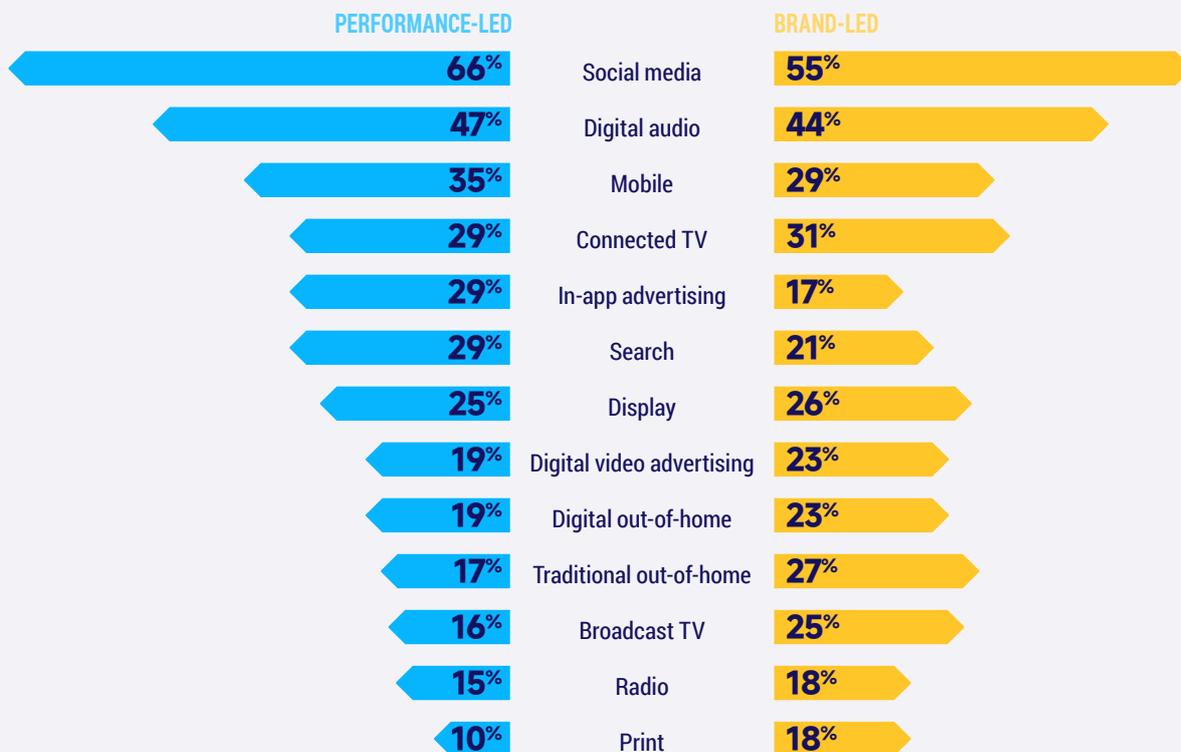
In the Chinese market, advertisers generally prefer pairing pDOOH with the following top four media: *social media ads, digital audio, mobile ads, and CTV*. These high-traffic, dynamic channels are indispensable in Chinese advertisers' media plans.

Programmatic DOOH is recognised for its dual role as both a "performance-driven" and "brand-building" media, delivering superior sales conversion through precise targeting while also offering broad reach and strong visual impact for brand awareness.

Therefore, in campaigns with distinct branding or performance objectives, pDOOH is often combined with different ad formats:

For performance-led campaigns, more respondents chose in-app ads (29%) and search ads (29%) as complementary channels¹². For brand-building goals, traditional OOH (27%) and display ads (26%) were favoured by advertisers and agencies¹³.

THINKING ABOUT PERFORMANCE-LED/ BRAND-LED CAMPAIGNS, WHICH CHANNELS WOULD YOU CONSIDER RUNNING PROGRAMMATIC DIGITAL OUT-OF-HOME ALONGSIDE?



* Source D1&D2 Base size: all respondents (150)

* 12 D1 Thinking about performance-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?

* 13 D2 Thinking about brand-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?

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KEY DATA METRICS AND ATTRIBUTION CHALLENGES



01. Core Metrics Influencing Investment Decisions

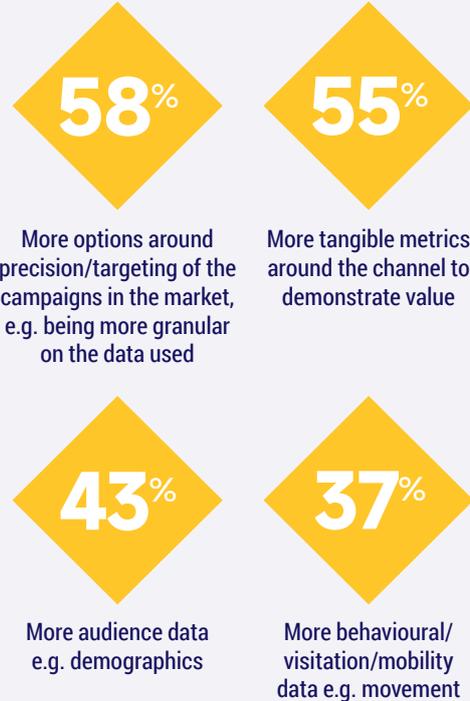
“More options around precision/targeting of the campaigns in the market, e.g. being more granular on the data used” and “More tangible metrics around the channel” emerged as the top two values most likely to increase respondents' willingness to invest in programmatic DOOH¹⁴.

This highlights a fundamental issue: marketers are particularly concerned about whether pDOOH offers the same robust data capabilities as online digital advertising. Specifically, they want to know if audience insights are segmented, if the effects can be tracked, and if the results of the advertising can be measured. In summary, data transparency and precise targeting are the key factors driving marketers to invest in pDOOH. Additionally, its capabilities of being measurable, evaluable, and optimisable are highly valued by these marketers.

Nearly 49% of respondents believe that “More cost efficiency from the market” is a crucial indicator. This perspective stems from two key factors: firstly, domestic advertising investments have become more cautious and focused on results compared to the past, leading marketers to prioritise the direct returns that pDOOH offers. Secondly, this trend highlights the importance of having clearer input-output relationships and third-party verification, which could boost marketers' confidence in the cost-effectiveness of pDOOH and encourage increased investment.

Additionally, 43% of respondents considered “audience data” highly valuable. The three most sought-after types of audience data were: “Socio-economic data (e.g., income)” (69%), “Shopping behaviour/types” (60%) and “Product affinities” (57%)¹⁵.

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?



* Source: C8 Base size: all respondents (150)

WHICH OF THE FOLLOWING TYPES OF AUDIENCE DATA WOULD BE MOST USEFUL IN TARGETING PROGRAMMATIC DIGITAL OUT-OF-HOME CAMPAIGNS?



* Source: C9 Base size: all respondents (150)

¹⁴ C8 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?
¹⁵ C9 Which of the following types of audience data would be most useful in targeting programmatic digital out-of-home campaigns?

02. Common Measurement/ Attribution Methods

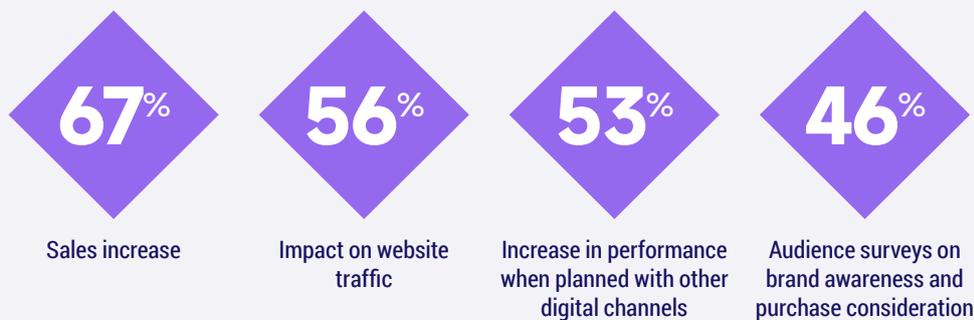
Compared to online programmatic advertising, programmatic OOH measurement is relatively coarse and limited. Additionally, the attribution of offline consumer behaviour paths is complex and consumers are significantly influenced by environmental variables. Therefore, performance measurement has become a key challenge for pDOOH, leading some brands to approach it with caution.

Currently, the two most common measurement methods for pDOOH campaigns in China are “Sales increase” (67%) and “Impact on website traffic” (56%)¹⁶.

In contrast, only 47% of respondents in VIOOH’s 2024 State of the Nation global survey used “Sales increase” to measure pDOOH effectiveness—a nearly 20% point gap from the Chinese market. This highlights Chinese advertisers’ strong preference for hard performance metrics like post-campaign ROI, underscoring the market’s emphasis on measurable results.

However, the lack of a standardised pDOOH measurement framework currently limits brands’ ability to conduct in-depth campaign analysis.

HOW DO YOU SEE MEASUREMENT/ATTRIBUTION IN PROGRAMMATIC DIGITAL OUT-OF-HOME BEING MEASURED?



* Source: D5 Base size: all respondents (150)

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THE FUTURE- FOCUSED “GROWTH ENGINE” OF CREATIVITY



01. pDOOH Offers More Creativity

39% of respondents believe that pDOOH offers brands more innovative opportunities, ranking third among all mainstream media channels in the Chinese market¹⁷.

This perception stems from three factors. Firstly, the increasing penetration of LCD screens in China ensures the visual fidelity and performance of pDOOH. Secondly, real-time dynamic optimisation makes creative execution more convenient. Thirdly, pDOOH is increasingly integrating with innovative technologies like AI and AR, promising future creative potential.



**“WE ARE
CONSIDERING
USING DCO IN THE
FUTURE”**

02. Actively embrace DCO technology

Dynamic Creative Optimisation (DCO) is gaining rapid traction in China’s pDOOH market. This technology dynamically generates the most relevant creatives based on real-time variables like weather, time, location, and audience demographics.

Although DCO technology is still in its early stages of development, 42% of respondents who have placed pDOOH in the past year said they would consider using DCO in the future¹⁸. Marketers who pursue creative, real-time, and automated capabilities have shown a positive attitude towards DCO technology, providing a fundamental environment for the continued integration of DCO and pDOOH.

For brands yet to adopt DCO, the main barriers are: “Budgetary constraints for implementing DCO campaigns” (52%) and “Lack of awareness and understanding of DCO capabilities” (48%)¹⁹.

It is evident that, for decision-makers, it is quite necessary to further reduce the implementation costs of DCO technology and to complete the education on the understanding of DCO technology. This may become a key lever to promote the penetration rate of DCO-pDOOH in the Chinese market.

* 17 B6 Which of these media are developing the most innovative opportunities for advertisers?

* 18 D7 Do you currently integrate Dynamic Creative Optimisation (DCO) into your programmatic digital out-of-home advertising?

* 19 D8 Which of the following, if any, are preventing you from adopting Dynamic Creative Optimisation (DCO) for programmatic digital out-of-home advertising?

WHICH OF THE FOLLOWING, IF ANY, ARE PREVENTING YOU FROM ADOPTING DYNAMIC CREATIVE OPTIMISATION (DCO) FOR PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING?



Budgetary constraints for implementing DCO campaigns



Lack of awareness and understanding of DCO capabilities



Lack of understanding/confidence in the technology to execute the creative play out correctly

* Source: D8 Base size: respondents that have placed pDOOH in the past 12 months but hadn't integrated DCO (21)



"AI is a driving force behind pDOOH's evolution, enabling dynamic creative optimisation. As the technology matures, more brands will join the pDOOH ecosystem."

Terry Lin, Senior Media Director, McDonald's China Marketing Department

03. Creativity and Precision Coexistence: How pDOOH Plays the Role in Contextual Marketing?

Respondents who have not yet integrated DCO technology pay more attention to "Relevance at scale" and "Message sequencing" (both 52%). This shows that marketers are more concerned about whether DCO can quickly and efficiently produce creative content that is suitable for different times, places, and audiences in high-frequency exposure scenarios.

At the same time, "improved relevance" (48%) and "localisation and geo-targeting" (48%) are also viewed as important benefits²⁰. This preference indicates that advertisers' expectations for DCO have evolved beyond mere creative tactics. They are seeking precise ad matching and enhanced delivery efficiency through DCO.

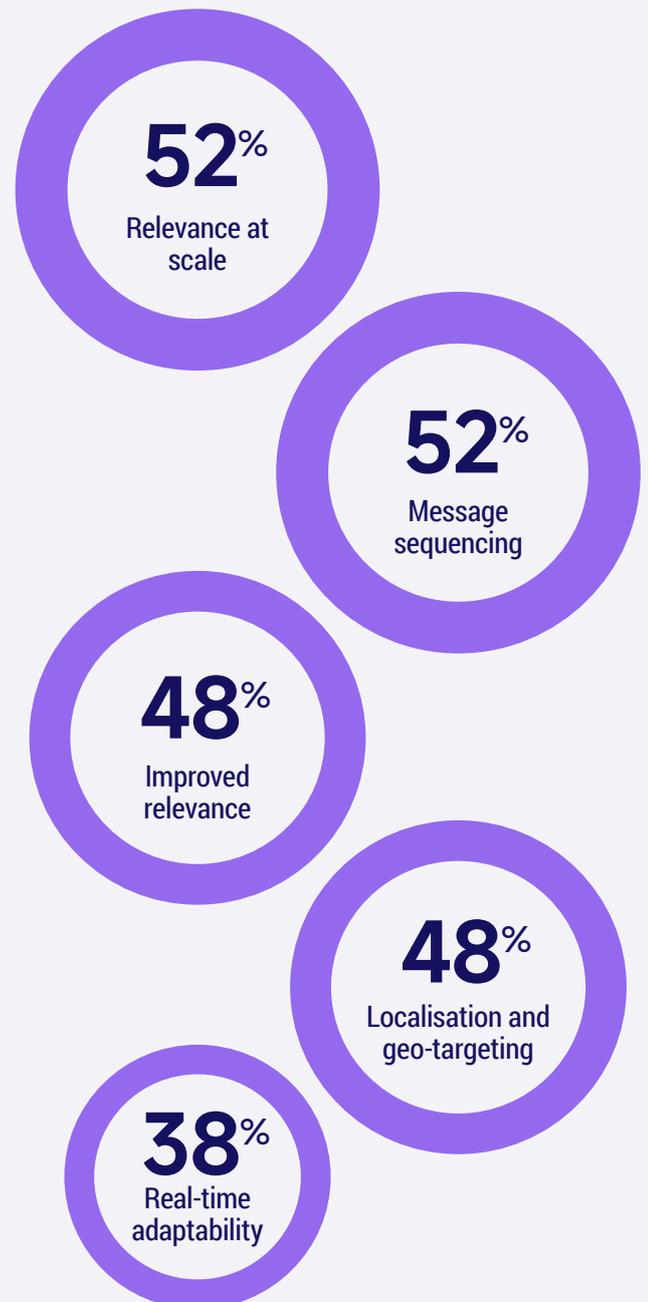


"pDOOH isn't just an ad screen; the surrounding environment itself is part of the context, influencing communication effectiveness."

Wang Shui, Dean of School of Culture and Communication, Capital University of Economics and Business

The results align with the growing trend of contextual marketing in the domestic marketing industry, which focuses on engaging consumers through real scenarios rather than relying solely on traditional advertising techniques. DCO can generate tailored content that closely relates to the environment, utilising real-time data such as weather conditions, geographic locations, and audience demographics. Meanwhile, pDOOH provides a media landscape that allows for real-time scheduling, facilitating the adaptation of marketing content. This combination not only enhances communication efficiency but also increases consumers' psychological acceptance, making advertising feel more natural and persuasive.

WHICH, IF ANY, OF THE FOLLOWING POTENTIAL BENEFITS CAN DYNAMIC CREATIVE OPTIMISATION (DCO) OFFER FOR PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING?



* Source: D9 Base size: respondents that have placed pDOOH in the past 12 months but hadn't integrated DCO (21)

STATE OF THE NATION

Programmatic DOOH 2025

| CONCLUSION



pDOOH has evolved into an indispensable component of China's media landscape, garnering widespread attention and anticipation from brands, media agencies, and academia alike.

The rapid growth of the pDOOH industry reflects both quantitative and qualitative advancements. On one hand, adoption rates continue to rise as more advertisers incorporate it into media plans and budget allocation beyond traditional OOH frameworks. On the other hand, brands are actively exploring ways to enhance pDOOH effectiveness across multiple dimensions—from data-driven pre-campaign planning and dynamic creative optimisation to real-time contextual responsiveness.

Although global DCO adoption is still in its early stages, Chinese marketers are keen to incorporate DCO into pDOOH campaigns. Concurrently, advertisers' heightened focus on performance metrics like sales and traffic, significantly above global averages, indicates the industry is transitioning from pure scale expansion to value-driven sophistication.

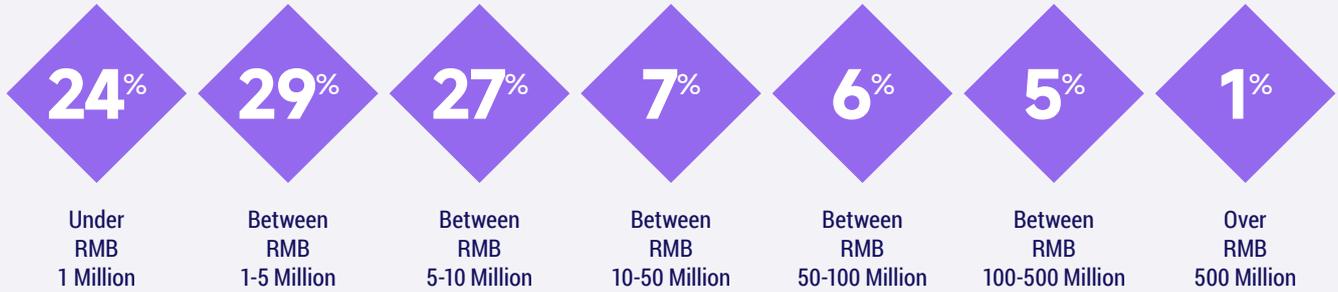
However, three critical barriers must be overcome to achieve sustainable and scaled growth in the Chinese market:

- ◆ **1. Lack of replicable typical cases:** lack of widely recognised, results-proven pDOOH benchmarks;
- ◆ **2. Inconsistent attribution standards:** lack of practical, standardised attribution and measurement methodologies;
- ◆ **3. Broken data chain between media and platforms:** lack of stable ecosystems and great difficulties in full-funnel integration.

In the future, as programmatic technology continues to evolve and brands cultivate a deeper understanding of contextual marketing, pDOOH will increasingly establish itself within the mainstream media landscape by the dual forces of strong creativity and robust data.

CHINA SAMPLE PROFILE

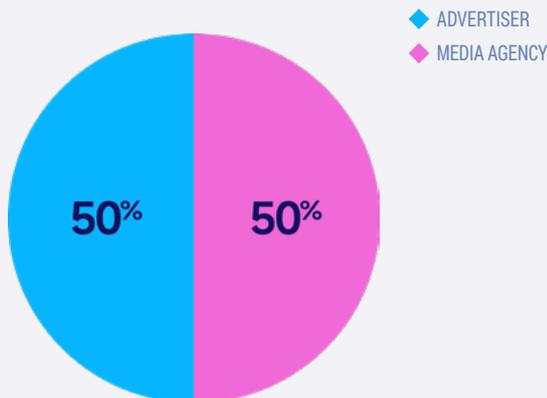
SIZE OF ADVERTISING BUDGET



SECTOR

Sector Net	Percentage
Retail, luxury, clothing, FMCG/CPG	29%
Finance, advertising, consulting	22%
Food, Drink, Hospitality	13%
Automotive, transport	13%
Entertainment	9%
Property, utilities	5%
Tech, telco	3%
Academic, gov, non-profit, healthcare	3%

ORGANISATION TYPE



MANAGERIAL RESPONSIBILITY

