

Beyond Borders: Global Demand & Curated Supply



JC Conti, CEO VIOOH

VIOOH

Live Media Owners:

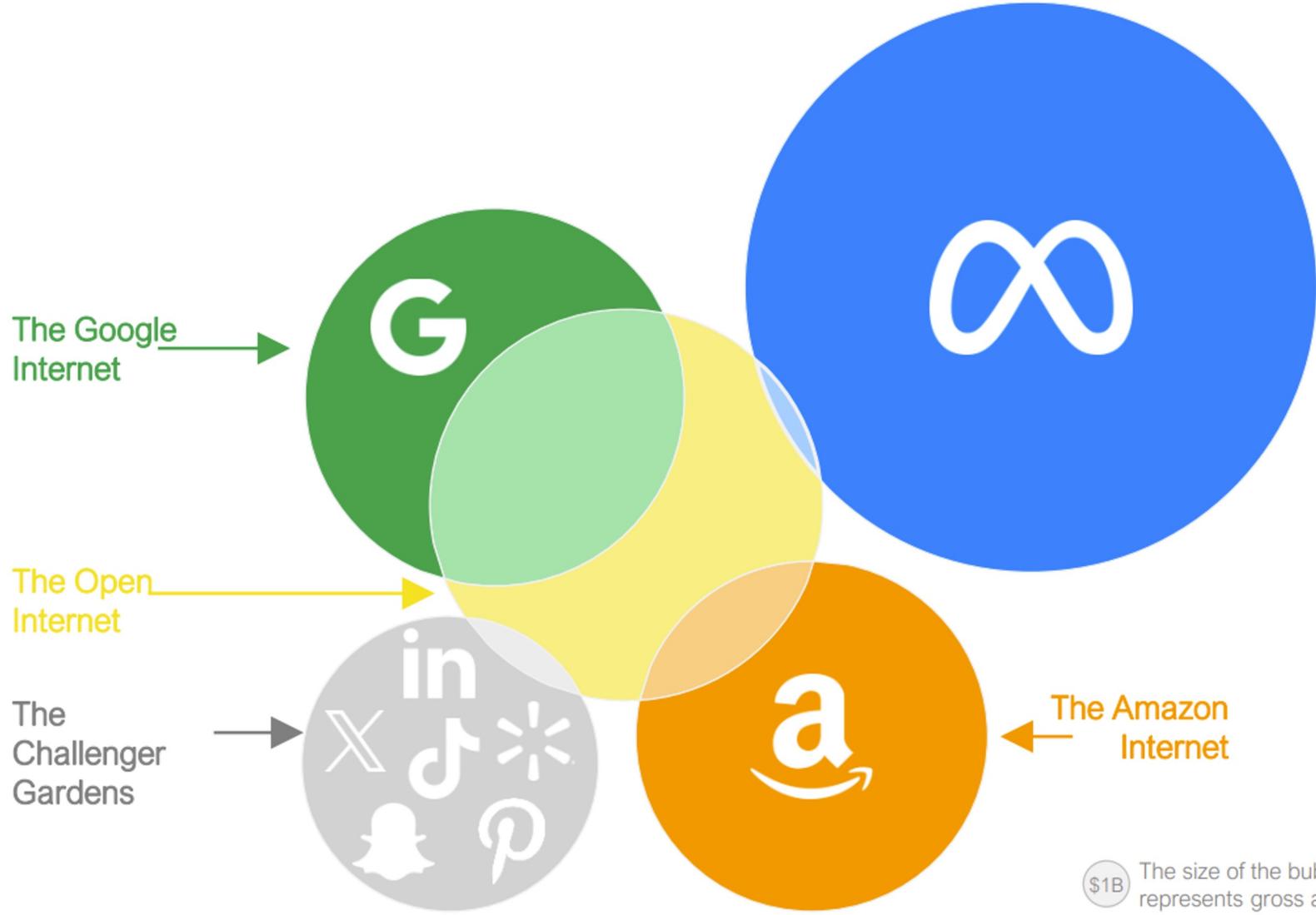


- Pressures in the Open Web and Opportunities for DOOH
- The Buyer's Voice: Omni-channel and Curation
- International Trends & China: The Awakening Giant



- 1. Audience Gatekeepers:** A small number of platforms have earned consumer trust as the starting point for nearly every digital media experience and therefore command a premium through controlling distribution (Google / Meta [web], Android / iOS [mobile], Roku / Amazon Fire / Samsung / LG [CTV]).
- 1. Demand Concentration:** The largest platforms therefore don't just control supply (consumer attention), they also control demand (dollars).
- 1. Bidstream Congestion:** Open internet media companies are financially incentivised to conduct multiple concurrent auctions for each available impression, creating a crowded bidstream... 90% of impressions bid request are pre filtered and not sent to the average DSP.
- 1. Signal Fidelity:** DSPs and their verification partners are building new capabilities to measure signal fidelity and are steering spend toward publishers and SSPs that provide direct relations and high integrity targeting information.

Estimated 2024 Global Non-Search Digital Ad Spend



← The Meta Internet

Top 3	Est 2024 O&O Ad Spend	Est 2024 Open Internet Ad Spend	Open Internet as % of Total
Meta	\$153.0b	\$1.6b	1.0%
Amazon	\$46.8b	\$11.5b	19.7%
Google	\$36.5b	\$31.1b	46.0%

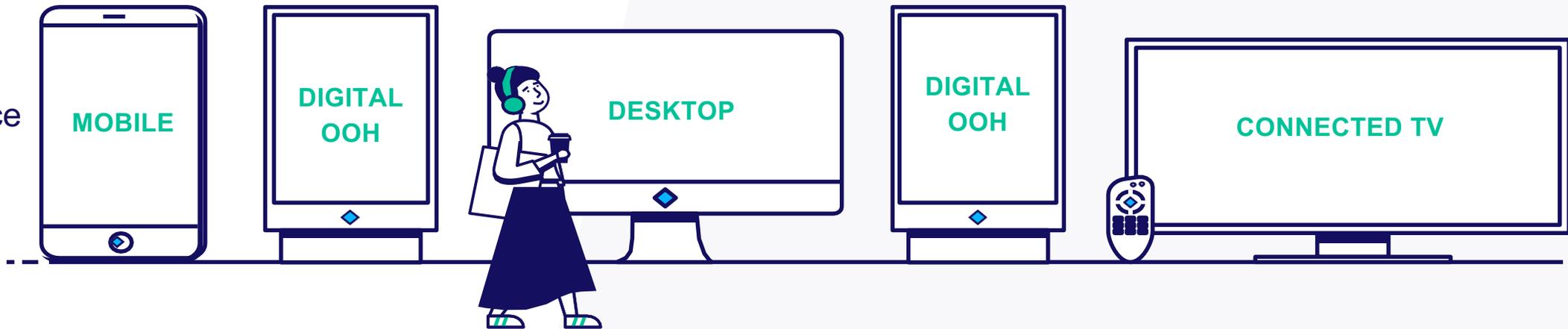
(\$1B) The size of the bubble represents gross ad spend

Source: "The State Of The Open Internet", Jounce Media, 2024

Programmatic transformation in Media



Buying by audience across screens along the day



Programmatic enables audience buys across channels and publishers

Dell

Multi-channel campaign with programmatic DOOH, mobile & desktop



The Wires 2024: Best Use of Digital Out-of-Home Technology

In collaboration with



Objective
Increase brand awareness and drive purchase intent

Campaign
Multi-channel campaign (pDOOH, mobile, display)

+6pts

Uplift in purchase intent

x2

Click-through rate on display and pre-roll ads compared with previous campaigns without pDOOH



Nespresso

Multi-channel campaign with programmatic DOOH, social and CTV



In collaboration with



Objective

Increase top of mind preference amongst coffee lovers

Campaign

Multi-channel campaign (pDOOH, social, CTV)

48%

Uplift in unaided brand awareness

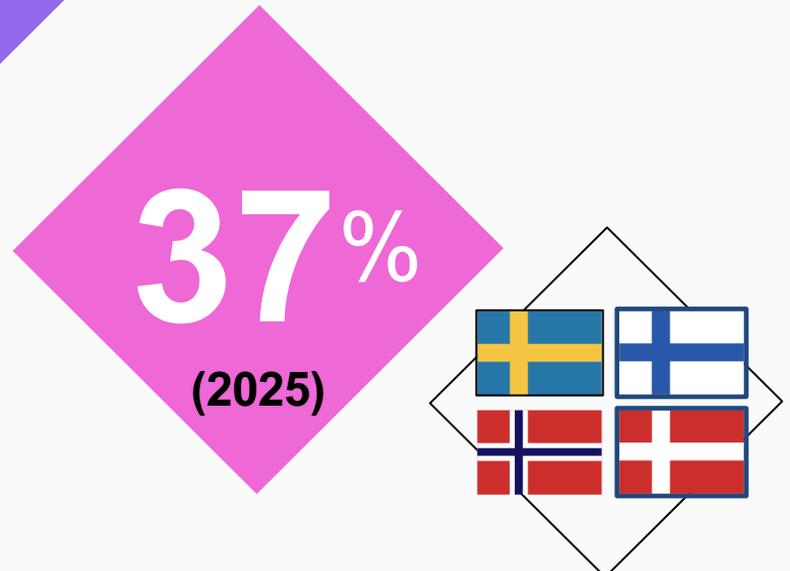
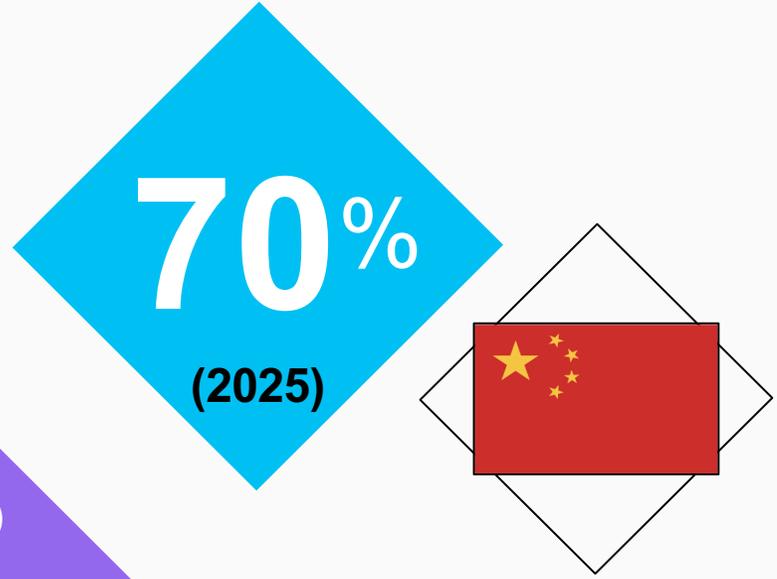
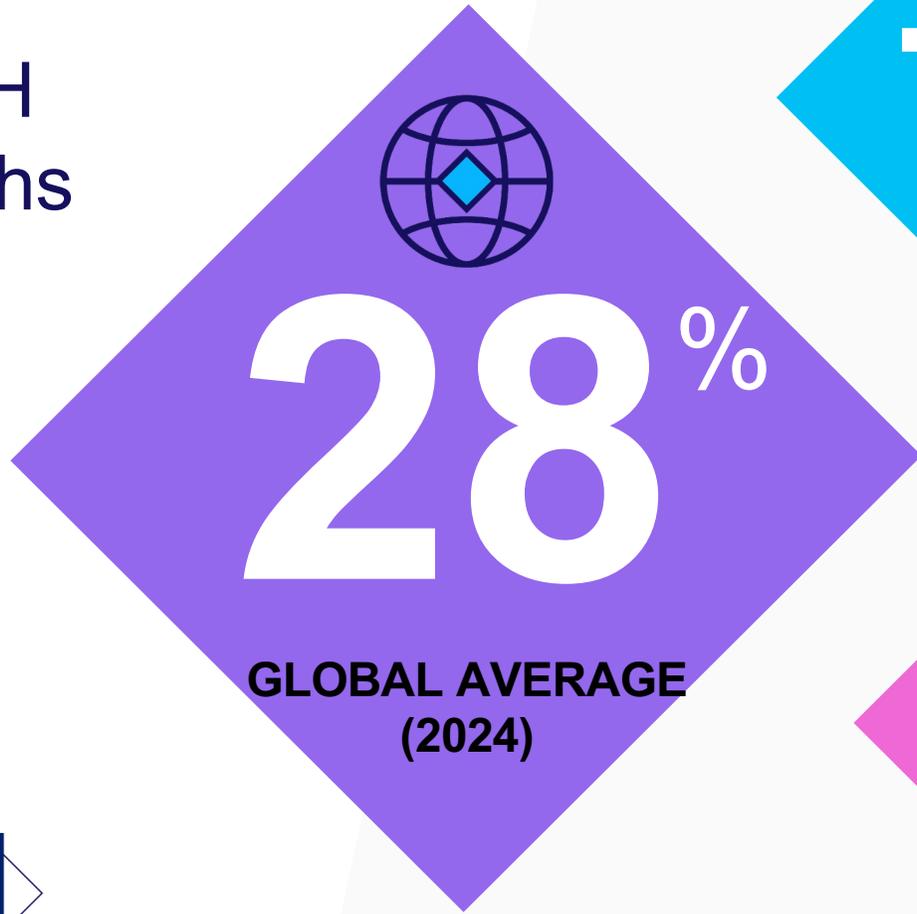
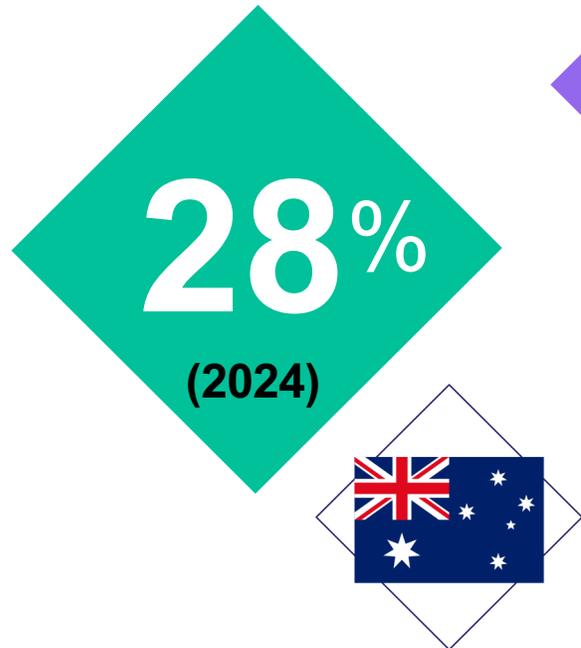
46%

Uplift in Nespresso being the first choice in category



The Buyer's Voice: More Buyers, Spending More Money

Media professionals are increasing their investments in pDOOH over the next 18 months

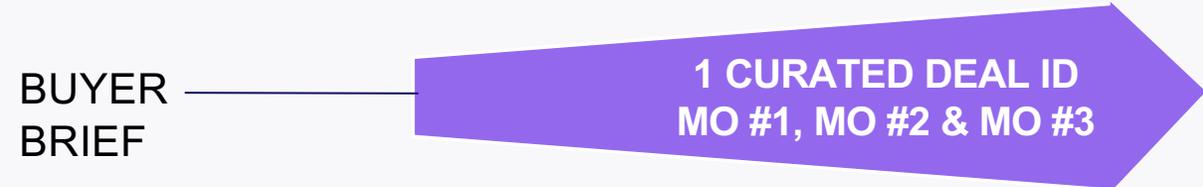


“Media agencies are increasingly seeking curated deals that aggregate relevant media owners and publishers based on specific criteria (such as audience characteristics or points of interest), a way of buying inventory that is already common in programmatic web.”

“What's shaping digital OOH in 2025? Key trends revealed”, Campaign, Dec 2024

Historic way of buying DOOH

Efficient way of buying DOOH, aligned with digital



Single line, **multiple Deal IDs**, single market/MO activations, grouped and running concurrently for one brief.

-> Ensures specific environments & screens

Single activation across all brief-matched impressions from a **marketplace of premium media owners**.

-> Ensures specific audiences

Qatar Airways & VIOOH Select

Co-ordinated programmatic DOOH multi-Media Owner, multi-market campaign reaching global travellers audience



Objective
Promote Qatar Airways winning Skytrax 'Airline of the Year 2024'

Campaign
Aug-Sept 2024 targeting airports and spectacular screens

Booked from the Middle East across high-traffic, iconic locations in multiple markets:

Australia
UK
Germany
France
North America

In collaboration with



viooh.com
hello@viooh.com

Global advertisers are increasingly booking campaigns into countries of particular interest:



VIOOH State of the Nation 2024: Global

Regional bookings

(e.g. within Europe, LATAM, North America etc)

25% in 2024 vs. 24% in 2023

Global bookings

17% in 2024

vs. 10% in 2023



State of the Nation 2025: Nordics

28% of respondents book pan-Nordic campaigns

18% book European regional campaigns

15% book global campaigns



State of the Nation 2025: China

25% of respondents had booked campaigns outside of China in the last 12 months

37%

VIOOH H1 '25 revenue from multi-market campaigns

ByteSIM

Cross-border eSIM provider used programmatic DOOH alongside multiple channels for call-to-action campaign



In collaboration with



Objective

Travellers departing from Changi Airport to Japan and South Korea

Campaign

Multi-channel campaign (mobile display, digital audio, pDOOH, CTV)

310k

impressions

5x

higher scan-through rate



Dreame

First-time Chinese advertiser running a campaign in the US, targeting travellers at LAX heading to CES conference



Objective

Driving awareness of Dreame household appliances

Campaign

Targeted tech-savvy audiences in airport environment

18%

shift in purchase intent

+12pt

Dreame's Net Promoter Score increase post-campaign

2

Nearest competitors overtaken in 'Smart Home Cleaning and Appliance brands' category

In collaboration with +

theTradeDesk + JCDecaux



Thank you