

# OOH Industry in Indonesia growth due to the country's rapid urbanization and increasing digital connectivity

OOH Trends Report — Q4 2024



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# OVERVIEW

The OOH advertising sector in Indonesia has been experiencing significant growth due to the country's rapid urbanization and increasing digital connectivity. This report highlights the key trends shaping the OOH advertising landscape in 2024, including investment growth, audience engagement, and emerging technologies.



# OOH **IMPACT**

Out-of-Home (OOH) advertising plays a crucial role in each stage of the marketing funnel—from building awareness to driving conversions.

## **AWARENESS**

OOH performs best for awareness across all demographics, while also ranking as the #1 preferred media format for Millennials and GenZ.

## **CONSIDERATION**

People take action after seeing out of home, whether in real life or digitally. In fact, OOH drives 5.3X more search queries and 5X more website visits than any other media.

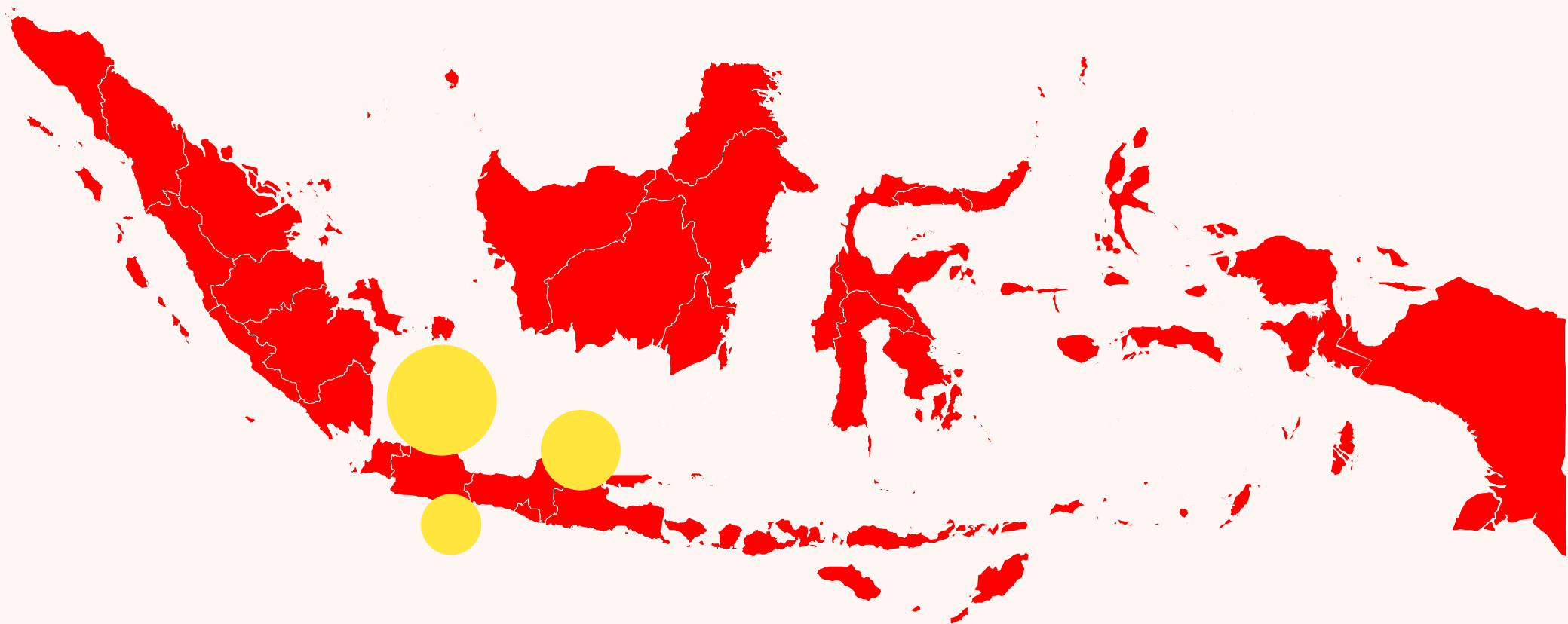
## **CONVERSION**

OOH demonstrates superior performance in awareness and nearly identical numbers with social media in consideration and conversion rates. With significantly lower CPMs than other mediums.



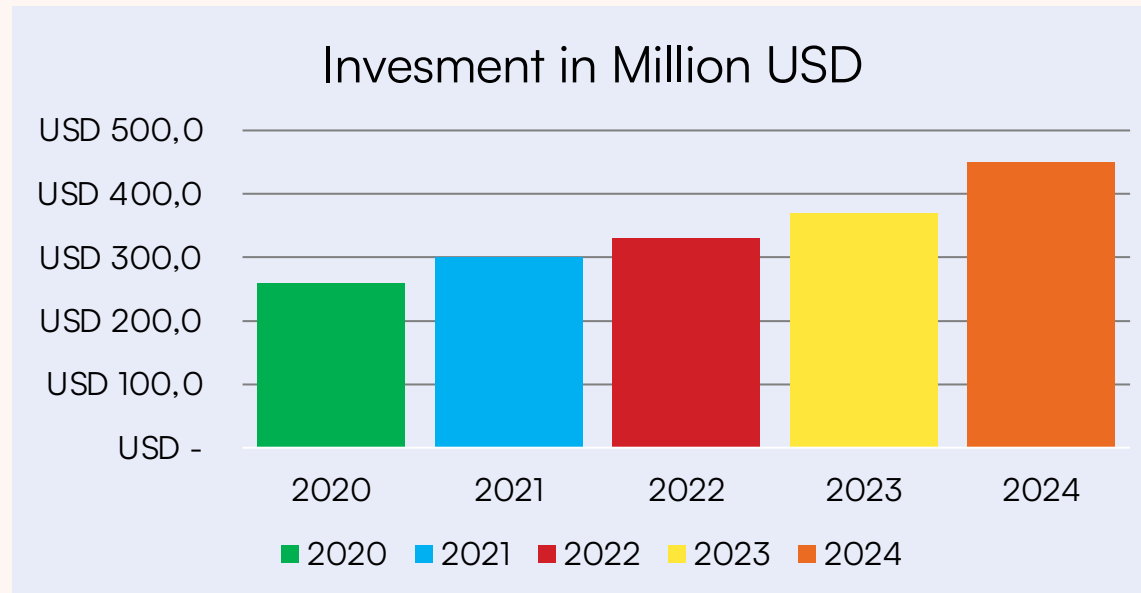
# OOH DISTRIBUTIONS

The map shows that Jakarta leads in investment, followed by Surabaya and Bandung, reflecting the concentration of high-traffic areas and urban centers.



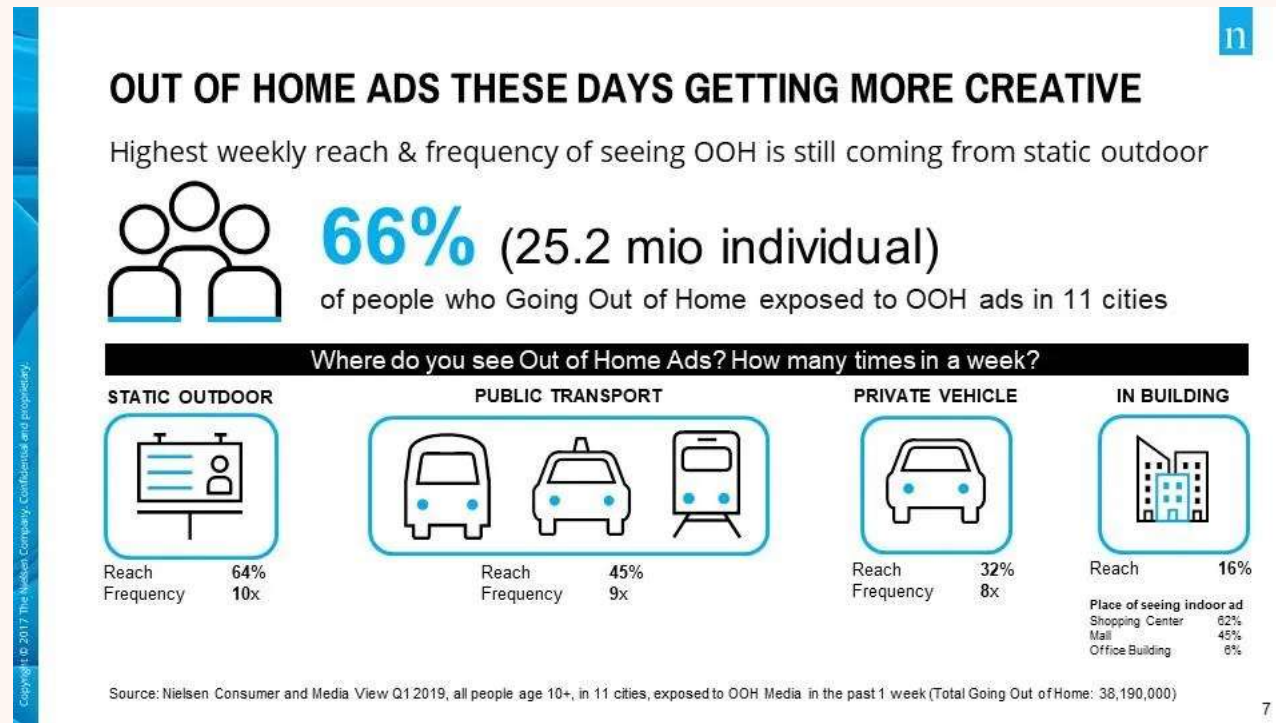
# Investment **GROWTH**

The out-of-home (OOH) advertising market in Indonesia grew from USD 260 million in 2020 to an estimated USD 450 million in 2024, driven by recovery from the pandemic and increased adoption of digital advertising formats.



# OOH REACH & COVERAGE

66% (22.2 mio) of people who going out home exposed to OOH ads in 11 cities and highest weekly reach & frequency still coming from static outdoor





# Key SEGMENTS

- **Digital Billboards:** The digital billboard segment is the fastest-growing area within the OOH market in Indonesia. These billboards offer dynamic content, real-time updates, and interactive capabilities, making them highly effective for advertisers.
- **Transit Advertising:** Ads on buses, trains, and taxis are popular due to their high visibility and the large, captive audience they reach. Transit advertising is particularly effective in major cities like Jakarta, Surabaya, and Bandung.
- **Static Billboards:** Traditional static billboards remain significant, especially in high-traffic urban areas and along major roads.





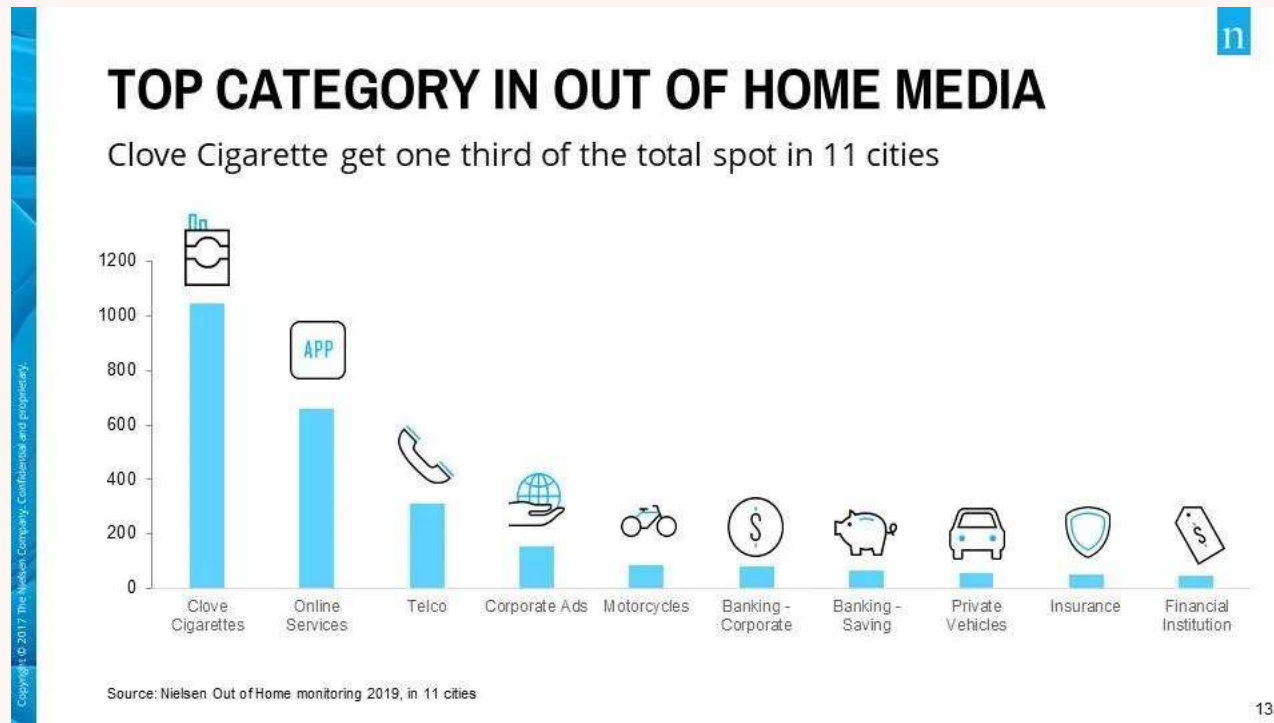
# Technological **ADVANCEMENTS**

- **Programmatic Advertising:** The adoption of programmatic buying in OOH advertising allows for real-time bidding and data-driven ad placements, enhancing the efficiency and effectiveness of campaigns.
- **Augmented Reality (AR) and Interactive Ads:** Innovations such as AR and interactive billboards are gaining traction, offering engaging and immersive experiences for audiences. These technologies help capture attention and increase engagement.



# Top CATEGORY

Clove Cigarette get one third of the total spots in 11 cities in Indonesia following by Online Services and Telecommunication



# Top 21 MARKETS

	CITY	POPULATION	BUSES	TRAIN	AIRPLANE	MOBILE LED	LED BILLBOARD	STATIC BILLBOARD	JUNIOR BILLBOARD	CAR & MOTORCYCLE
1	East Jakarta	3,314,396	<div><div></div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
2	Surabaya	3,009,286		<div><div></div><div></div><div></div></div>		<div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
3	West Jakarta	2,611,515	<div><div></div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
4	Bandung	2,569,107	<div><div></div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>		<div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
5	Medan	2,536,271				<div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
6	Bekasi	2,513,669	<div><div></div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>		<div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
7	South Jakarta	2,406,082	<div><div></div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
8	Depok	1,941,360		<div><div></div><div></div><div></div></div>		<div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
9	Tangerang	1,912,679		<div><div></div><div></div><div></div></div>		<div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
10	North Jakarta	1,873,096	<div><div></div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>

Indicates Lestari Ads media available

Indicates digital media available

Indicates static media available

Indicates wrapped media available

Note: Top 21 markets based on Lestari Ads inventory and population count



# Top 21 MARKETS

	CITY	POPULATION	BUSES	TRAIN	AIRPLANE	MOBILE LED	LED BILLBOARD	STATIC BILLBOARD	JUNIOR BILLBOARD	CAR & MOTORCYCLE	SCOOTER TRAILER
11	Palembang	1,772,492				●	●●	●●	●●	●●●	
12	Semarang	1,696,366		●●●		●	●●	●●	●●	●●●	
13	Makassar	1,474,393				●	●●	●●	●●	●●●	
14	South Tangerang	1,414,619	●●●●	●●●		●	●●	●●	●●	●●●	
15	Batam	1,260,785				●	●●	●●	●●	●●●	
16	Bogor	1,127,408		●●●		●	●●	●●	●●	●●●	
17	Pekanbaru	1,123,348				●	●●	●●	●●	●●●	
18	Central Jakarta	1,102,052	●●●●	●●●		●	●●	●●	●●	●●●	
19	Bandar Lampung	1,100,109				●	●●	●●	●●	●●●	
20	Padang	934,847	●●●●			●	●●	●●	●●	●●●	
21	Bali	665,328	●●●●			●	●●	●●	●●	●●●	●●●

● Indicates Lestari Ads media available   ● Indicates digital media available   ● Indicates static media available   ● Indicates wrapped media available

*Note: Top 21 markets based on Lestari Ads inventory and population count*

# RECOMMENDATIONS

With Out-of-Home (OOH) advertising experiencing robust growth in Indonesia, advertisers and media companies are advised to capitalize on digital formats, urban expansion, and data-driven targeting to maximize impact and visibility in this evolving market

## 1. Invest in Digital OOH (DOOH)

With the increasing adoption of digital billboards and interactive displays, companies should prioritize investment in Digital OOH. This medium allows for dynamic content, real-time updates, and better audience engagement. Locations with high traffic such as shopping centers, airports, and public transportation hubs offer prime opportunities for DOOH ads.

## 2. Leverage Programmatic Advertising

Programmatic buying in OOH enables advertisers to target specific demographics based on location, time of day, and consumer behavior. This level of precision improves ad relevance and ROI. Advertisers should explore programmatic OOH platforms that provide real-time data and analytics to optimize campaign performance.

### **3. Integrate OOH with Mobile and Social Media**

OOH ads work best when integrated with digital campaigns. By using QR codes, social media hashtags, or geo-targeted mobile ads, advertisers can create a multi-channel experience. This strategy not only expands the campaign's reach but also encourages user interaction and engagement across various platforms.

### **4. Focus on High-Growth Urban Areas**

Indonesia's rapid urbanization is creating new advertising opportunities in major cities like Jakarta, Surabaya, and Medan. Advertisers should focus their OOH campaigns on these metropolitan areas, where population density and commuting patterns offer maximum visibility.

### **5. Utilize Data for Targeted Campaigns**

OOH campaigns can be further optimized by using data to understand consumer behavior and traffic patterns. This data can inform advertisers on the best locations, times, and types of content to display for maximum impact. Partnering with data analytics providers or using in-house tools can enhance the effectiveness of OOH campaigns.

### **6. Capitalize on Major Events**

Events like the 2024 Indonesian presidential election, large cultural festivals, and international conferences offer unique opportunities for OOH advertisers. Targeting high-traffic areas during these events can significantly boost brand visibility and engagement.



# Thank **YOU**



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