



# Back-to-Market Shift: OOH Opportunities in Q2 2025

OOH Trends Report — Q2 2025



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# Overview

The Out-of-Home (OOH) advertising sector in Indonesia continues to show strong resilience and adaptive innovation. In Q2 2025, brands are leaning more into tech-enabled OOH formats, hyperlocal strategies, and multi-channel integration with digital platforms.

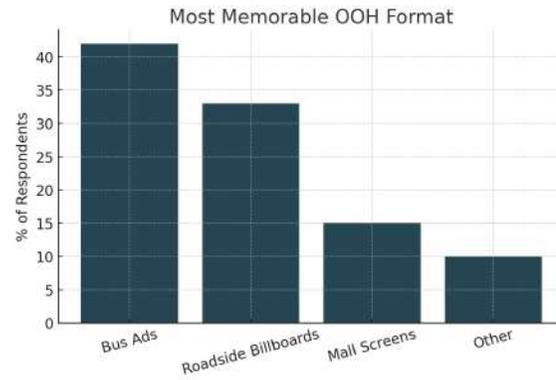
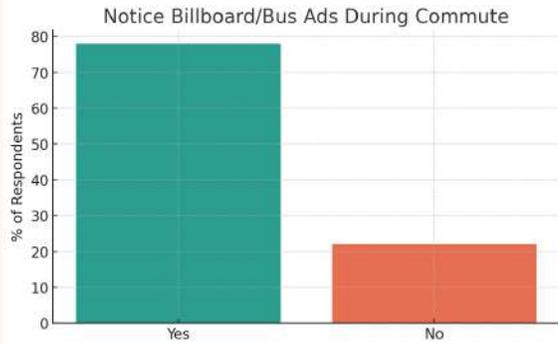
With the build-up to the local elections (Pilkada) in November 2024 still influencing Q2 placements, and economic optimism after a stable Q1, advertisers are shifting from awareness to conversion-focused storytelling, especially in urban transport and retail-heavy zones.



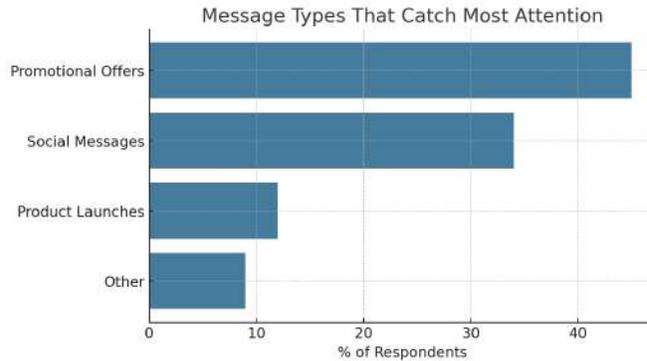
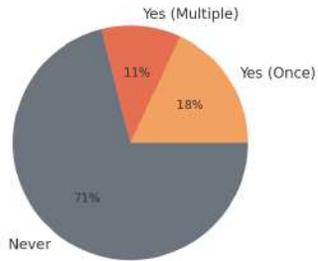
# Market Overview

- YoY Growth: +8.7% (compared to Q2 2024)
- Estimated Spend: IDR 2.9 Trillion
- Top Cities for Spend: Jakarta, Surabaya, Bandung, Medan, Semarang





Scanned QR Code from OOH Ad



## Public Perception & Effectiveness of OOH Advertising in Indonesia

- Conducted: March 2025
- Sample Size: 2,100 respondents
- Source: JakPat Mobile Survey & Snapcart Analytics
- Demographic: Urban commuters, middle-income (B & C socioeconomic class), age 18-45

### QUESTIONS

### TOPLINE RESULT

Do you notice billboard or bus ads during your commute?

78% said yes

Which OOH ad format is most memorable to you?

42% - Bus Ads; 33% - Roadside Billboards; 15% - Mall Screens

Have you ever scanned a QR code from an outdoor ad?

29% said yes, and 11% did it more than once in a week

Do you trust a brand more if you see it in public places?

61% said yes or somewhat yes

What message types catch your attention most in OOH?

45% - Promotional Offers; 34% - Social Messages; 12% - Product Launches

These survey findings confirm the enduring impact of physical OOH, especially bus ads and QR-based call-to-actions. Consumer trust and memorability are strongly influenced by repeated visibility, making OOH a key asset for awareness and conversion when combined with digital touchpoints.

# Media Mix Evolution

OOH Format	Market Share Q2 2025	Trend
Roadside Billboards	34%	Stable usage
Transit (Bus, Train)	26%	↑ Driven by urban mobility
DOOH (Digital OOH)	21%	↑ Accelerating in malls & transit
Ambient Media	11%	↑ Experiential growth
Airport / In-Flight	8%	↓ Slight dip post-Lebaran

# Creative & Message Trends

## 1. Localized Messaging

Hyperlocal creative is gaining traction, "Bahasa daerah" (local languages) used in Jogja, Makassar, and Medan campaigns.

## 2. Immersive & Swarming

Fleet branding ("Swarming") becoming common in FMCG and beverage industry to dominate neighborhood streets

## 3. Socially-Driven OOH

Brands tapping into national pride, environment, or community themes especially during Hari Lingkungan Hidup (June 5) and Hari Anak Nasional (July 23)

# Key Events

Month	Event/Season	Opportunity for OOH
April	Ramadan/Eid al-Fitr (post-season promotions)	Brand reactivation
May	Back to school	Uniforms, education tech ads
June	Mid-year Sale (Gadget/Fashion)	Retail, online marketplace war
July	Travel season	Tourism boards, airline promos

# What to Watch & Anticipate

## Programmatic DOOH Uptake

- Expected increased adoption by fintech, e-commerce, and telco players
- Adtech companies testing real-time bidding on screens in malls and train stations

## Political OOH Placements

- With local elections coming in Q4 2025, pre-campaign *soft branding* is visible especially in regional areas
- Watch for *spending surge in Q3*; early buyers securing premium billboard zones now

## Environmental Scrutiny

- Local governments in Bandung and Bali pushing for stricter visual pollution regulation may affect oversized or unlicensed billboards

## Transport Infrastructure Expansion

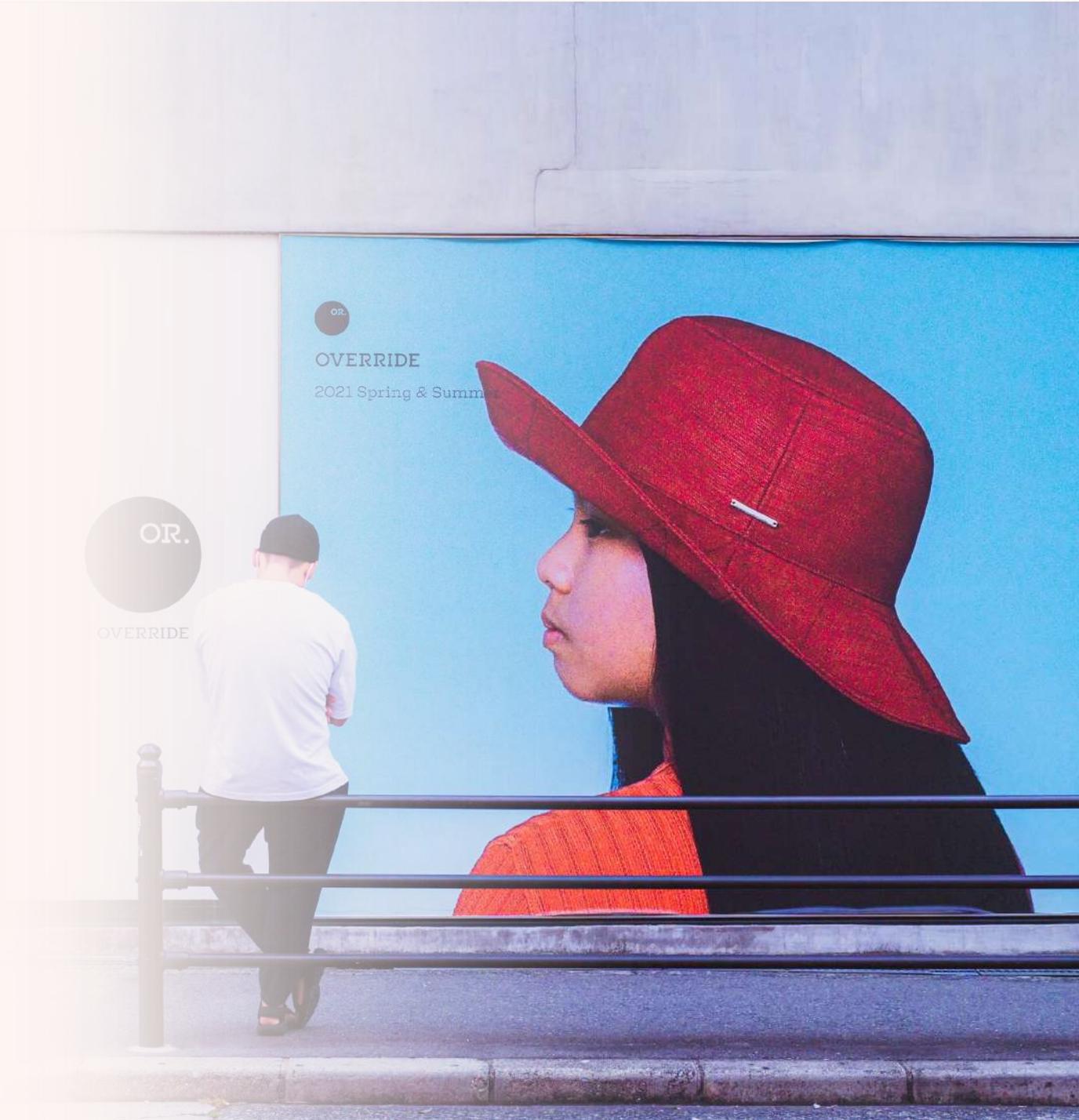
- Jakarta MRT Phase 2 development offers early-stage brand partnerships
- New toll roads in Kalimantan and Sulawesi open fresh media opportunities

# Strategic Recommendations

1. Secure Transit Media Early: Especially for high-traffic routes in Jakarta, Semarang, and Surabaya. Inventory is selling out faster due to post-election spend anticipation.
2. Embrace Dynamic DOOH: Use time-based triggers to boost relevance.
3. Prepare for Political Noise: Commercial advertisers should avoid July - November for high-impact political areas unless brand is non-partisan.
4. Invest in Measurement: Incorporate mobile retargeting or QR code tracking to attribute lift from OOH campaigns.

# Summary

OOH in Indonesia is on an upward trajectory in Q2 2025. The blend of traditional dominance (billboards, buses) with digital agility (DOOH, programmatic buying) positions it as a powerful channel, especially when used as part of an integrated media strategy.



Thank **YOU**



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