

Digital Out-of-Home as a Structural Shift in OOH

OOH Trends Report — Q3 2025



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Executive Summary

Q3 2025 marked a transformative period for OOH advertising in Indonesia, where brand investment, technology adoption, and audience engagement converged. While traditional OOH remained a staple for mass visibility, Digital Out-of-Home (DOOH) adoption accelerated significantly, reshaping how brands plan, execute, and measure outdoor campaigns. This trend reflects a broader evolution in the industry, one where presence meets data-driven relevance.

Market Overview

In Q3 2025, the Indonesian advertising economy continued to grow, with overall spend expected to increase by ~5.1%, reaching USD 4.0 billion. Within this:

- Digital advertising led with double-digit growth (10 - 12%).
- OOH (including DOOH) followed with solid mid-single-digit lift (~7% YoY).
- TV and other traditional media remained stable but with slower growth.

This demonstrates that while global attention skews digital, OOH especially DOOH remains a pivotal channel in Indonesia's media mix.

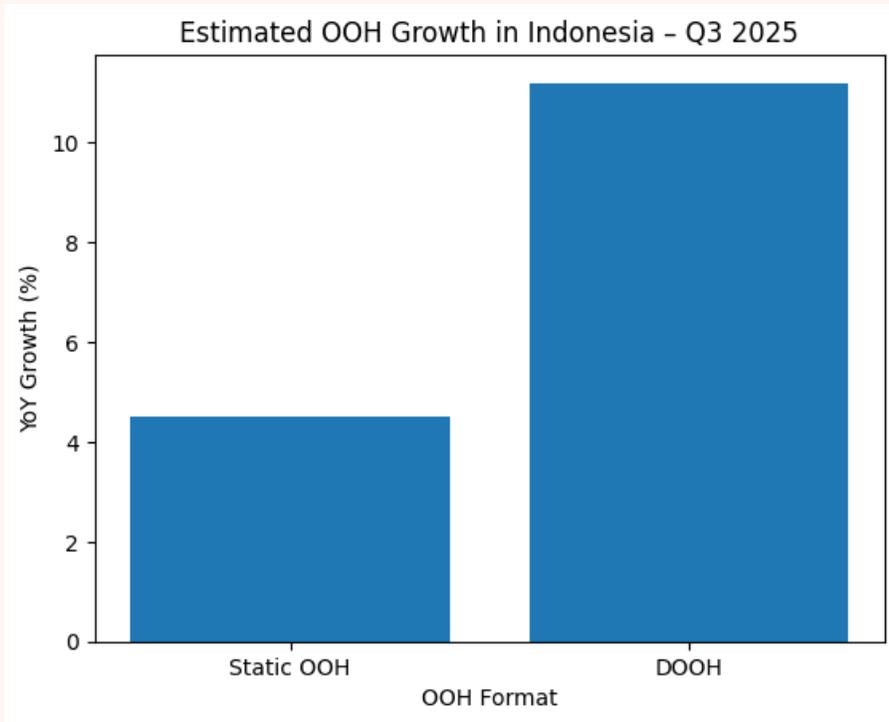


OOH Cost & Performance Metrics

Understanding benchmarks helped advertisers plan investments more strategically.

FORMAT	TYPICAL CPM (IDR)	TYPICAL CPM (USD)
Static Billboards	IDR 38.000 - IDR 75.000	~USD 2.5 - USD 5
Digital Billboard	IDR 60.000 - IDR 120.000	~USD 4 - USD 8
Transit OOH	IDR 45.000 - IDR 95.000	~USD 3 - USD 6
Indoor OOH (malls)	IDR 30.000 - IDR 55.000	~USD 2 - USD 3.5

Performance: DOOH often outperformed static in engagement, and CPC-style metrics (via QR activations) brought hybrid OOH closer to digital ad efficiency.



Estimated OOH Growth in Indonesia

In Q3 2025, Digital Out-of-Home (DOOH) significantly outpaced static OOH in Indonesia, recording more than double the year-on-year growth and reinforcing DOOH as the quarter's defining format shift rather than a complementary channel.



Trends in Creative Formats & Engagement

Q3 2025 saw brands experimenting with:

- Interactive screens and AR triggers
- QR-integrated OOH to drive online engagement
- Contextual creative messaging (e.g., weather, time)
- Transit wraps and experiential outdoor activations

These creative choices went beyond static visibility and helped extend campaign lifecycles into social and mobile engagement.

Key Events

Month	Event/Season	Opportunity for OOH
July	School Holiday Peak	Family travel, FMCG, entertainment, mall traffic
August	Independence Day Warm-Up (pre-campaign phase)	National branding, telecom, financial services
August	Independence Day (17 August)	Patriotic campaigns, mass awareness, brand affinity
September	Pre Year-End Budget Release & Trade Push	B2B, property, automotive, corporate branding

Q3 2025 is characterized by heightened mobility, national sentiment, and a return to urban routines, making it a strong quarter for high-reach OOH and DOOH campaigns that prioritize visibility, relevance, and sustained brand presence.

What to Watch & Anticipate

1. Acceleration of DOOH Inventory Expansion

More digital screens are expected to come online in urban corridors and secondary cities, increasing both availability and competition for premium placements.

2. Rising Demand for Contextual & Real-Time Creative

Brands will increasingly adapt OOH messages based on time, location, and situational relevance to improve engagement and recall.

Strategic Recommendations

1. Focus investment on digital formats along transit corridors, business districts, and lifestyle hubs to capture peak daily movement and maximize repeated exposure.
2. Use dynamic messaging aligned with time, location, or key moments to increase relevance and strengthen audience recall.
3. Align OOH placements with mobile and digital channels to extend reach, reinforce frequency, and support measurable campaign outcomes.

Summary

Q3 2025 reaffirmed OOH as a medium of real presence. Amid rising mobility and national moments, DOOH stood out for its consistent visibility, contextual relevance, and growing integration with digital channels, underscoring the continued importance of physical-world presence in building lasting brand recall.



Thank **YOU**



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