



Holiday Impact & Hyper-Local Hotspots

OOH Trends Report — Q4 2025



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Executive Summary

Q4 2025 represented the most commercially aggressive period of the year for Out-of-Home advertising in Indonesia. Unlike Q3, which was defined by experimentation and structural shifts toward DOOH, Q4 was driven by urgency, competition, and measurable outcomes.

Market Overview

In Q4 2025, the Indonesian advertising market is projected to grow to USD 4.2 billion. The narrative shifts from adoption (Q3) to performance (Q4), as brands leverage OOH to capture the year-end shopping peak.

- Key Growth Factor: Contextual Shoppable DOOH (Directly linking screens to 12.12 e-commerce sales).
- Mobility Fact: Public movement in Jakarta is expected to surge by 78.8% at key transit terminals compared to normal periods.



Strategic Hotspots: The Jakarta Festive Map

Instead of general Trends, we highlight the specific locations that will dominate Q4 foot traffic.

LOCATION	EXPECT CROWD PEAK	AD STRATEGY
Bundaran HI	Dec 23 - 31 (Light Festival)	Immersive 3D/Video Mapping
Central Park Mall	Nov 25 - Jan 5 (Pokemon Fest)	Family-oriented / AR interactive
Pantai Indah Kapuk (PIK)	Weekends (Dining & Lifestyle)	High-end F&B & Fashion
Monas & Kota Tua	Dec 25 - Jan 1 (Cultural Tours)	Mass-market FMCG & Banking

Mobility Peak & Conversion Triggers

In Q4, the narrative shifts from daily commuting to Discovery & Destination travel

SEGMENT	PROJECTED REACH SURGE	OOH IMPACT FACTOR
Inter-city Tolls (Trans-Java)	+30-40% Traffic	Captures captive audiences during long-distance holiday travel
Retail Hubs (Modern Malls)	+80% Sales Uplift	OOH drives last-mile store visits for year-end discounts
Airport Terminals (Soekarno-Hatta)	~180k Daily Pax	Premium DOOH impacts high-spend domestic and international travelers



Campaign Timing & Execution Patterns

Q4 campaigns were increasingly structured in phases rather than continuous runs.

- Early-quarter presence to establish brand momentum
- Mid-quarter intensification aligned with paydays or major promotions
- Late-quarter reinforcement to sustain visibility

Brands that planned OOH as a sequence rather than a single placement achieved stronger message retention throughout the quarter.

Key Seasonal Moments

Month	Opportunity for Brands
October	Marked the transition into year-end commercial activity, with brands re-establishing presence after Q3 and preparing consumers for upcoming offers.
November	Characterized by heightened promotional messaging, increased mobility, and intensified competition across urban corridors.
December	Defined by peak retail traffic, holiday travel, and emotional year-end messaging. OOH visibility during this period played a critical role in maintaining brand salience amid heavy digital noise.

Q4 unfolds in stages, with each month serving a different role for OOH from rebuilding awareness, to reinforcing promotions, to sustaining brand presence during peak clutter.

What to Watch & Anticipate

1. The "Mudik" Effect: Unlike Q3's steady city flow, Q4 sees a massive exodus from Jakarta to Central/East Java (estimated 20.2 million travelers). Brands should pivot budgets to toll-road billboards (JORR) and provincial terminals.
1. Hyper-Personalization: Real-time creative updates based on live weather (e.g., showing Umbrella/Raincoat ads during December's monsoon rains) will see a 25% higher recall than static ads.
2. QR-to-Checkout: 11.11 and 12.12 campaigns are expected to see a 3.5x increase in QR-code scans compared to Q3.

Strategic Recommendations

1. Treat OOH as a consistency engine during high-noise periods, not a one-off activation.
2. Prioritize locations that intersect with daily routines rather than episodic events.
3. Design creative that reinforces existing campaigns instead of introducing new narratives late in the year.
4. Plan OOH activity in stages to maintain presence across the entire quarter.

Summary

Q4 2025 reaffirmed the strategic value of Out-of-Home advertising as a medium of certainty in an otherwise volatile media landscape. When competition intensified and attention fragmented, OOH delivered sustained presence, reinforced brand memory, and supported commercial outcomes through consistency and scale.



Thank **YOU**



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