

OUTDOOR
MEDIA
ASSOCIATION

OMA

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ANNUAL REPORT





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Reflecting on 2020

During the pandemic, Out of Home (OOH) signs supercharged their role as public noticeboards, broadcasting community health, safety and wellbeing messages – keeping spirits and cities alive.

Outdoor Media Association (OMA) members joined the frontline effort during the pandemic, keeping Australians informed and connected by broadcasting public health, safety and wellbeing messages on their signs. The industry was tenacious, creative and resilient in dealing with the impact of restrictions and public health orders which adversely affected business operations and revenue.



Enhancing capabilities

While lockdowns and restrictions posed a major challenge for the industry's audience measurement system, MOVE (Measurement of Outdoor Visibility and Exposure), it was able to complete its tenth annual data update to maintain the stability and credibility of the measurement system. **p.8**

In 2020, the OMA finalised a tender process and appointed global media measurement experts Ipsos to evolve MOVE for the digital age. Ipsos will upgrade MOVE to a national model and enhance the system's capability to measure Digital Out of Home (DOOH). The new system will be launched in 2023. **p.9**



Caring for the community

In a year that called on all Australians to be generous, the Outdoor industry donated \$92M in free advertising space to more than 140 not-for-profit organisations including arts, sports and charities across the country, an increase of six per cent from \$87M in 2019. **p.19**

The partnership with National Missing Persons Week entered its twelfth year with a campaign valued at over \$1M. During August, OMA member signs told the stories of missing persons through a campaign entitled *I'll see you later*. Between 2015 and 2020, close to \$7M of advertising space has been donated in support of the cause. **p.20**

For the past three years, the partnership with DrinkWise has delivered an important message to adults, in particular parents, reminding them to consider the impact their drinking habits can have on their children's future drinking behaviour. Since the beginning of the partnership in 2018, the campaign *Children inherit more than your looks* has been run four times and reached over 11M people. To date, OMA members have donated advertising space valued in excess of \$5M to the partnership with DrinkWise. **p.20**

Further, OMA members supported a campaign in collaboration with NSW Police and DrinkWise in May 2020 called *Pick up the phone, not another drink*, encouraging people to reach out for help with their mental health and stress. **p.20**

In July, the OMA National Health and Wellbeing Policy came into effect, restricting the advertising of discretionary food and drinks within a 150m boundary of primary and secondary schools. The world-first policy sees the Outdoor industry take an active step to meet community expectations and support government efforts to tackle overweight and obesity in Australia. Further, the industry pledged it would donate up to \$3M in OOH advertising space each year for campaigns that promote healthy diet and lifestyle choices. **p.34**



Uniting from afar

The pandemic disrupted many of the rituals and ceremonies Australians hold dear. The OMA supported the RSL's virtual Anzac Day initiative, *Light Up the Dawn*, which replaced the traditional Anzac Day march with an at-home vigil. OMA members promoted *Light Up the Dawn* using their network of digital signs, encouraging Australians to commemorate the occasion by lighting a candle outside their homes in honour of those who served. **p.19**

As the first set of restrictions began to ease, OMA members united for the global campaign *#OurSecondChance* developed by the World Out of Home Organisation (WOO) and UK creative agency New Commercial Arts. The signs invited people to reflect on the positives experienced during lockdown and what they may have rediscovered. It signposted the things that truly matter - neighbourhoods, family, friends, nature and the power of human kindness. *#OurSecondChance* was supported by more than 180 OOH companies across five continents and had an estimated media value of \$40M USD. **p.27**



“The year just ended was extremely challenging for the advertising industry, and the Outdoor industry felt the full brunt of COVID-19 lockdowns. Though the impact of these restrictions still lingers, our future outlook is bright.”

Charles Parry-Okeden, Chairman, OMA and MOVE.



Looking up again

The industry united to run the *Look Up* campaign for a third time over a four-week period in January and February.

The *Look Up* campaign was inspired by research published by renowned neural and systems complexity specialist Dr Fiona Kerr. In an age where we traverse our lives looking down at our screens, Dr Kerr's research resonated, as her findings indicate that the simple act of 'looking up' can have life changing benefits, encouraging connections with the surrounding environment, people and helping us grow our brains.

The campaign was driven by data that revealed four out of five Australians felt happier to be out and about after lockdown than they did before, and were looking forward to visiting hospitality venues, exploring their cities and socialising again. *Spring into Out of Home* was also a reminder to advertisers that audiences were back in the great outdoors. The campaign was designed by JCDecaux, with audience data provided by oOh!media. **p.26**



Renewed optimism

As the restrictions eased over spring, it was joyous to watch life return to our cities and public spaces. The Outdoor industry united to celebrate this special time with a campaign, *Spring into Out of Home*.



Looking to recover

The Outdoor industry was not insulated from the economic effects of the pandemic. Net media revenue decreased 39.4 per cent to \$566.5M in 2020, down from \$935.5M in 2019. The dominance of digital signs continued, with 56.1 per cent of revenue now attributed to digital. **p.36**





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Who we are

Out of Home (OOH) advertising connects people, spaces and brands. Day or night, messages displayed on billboards, bus shelters, public transport, in shopping centres and in office buildings never switch off.

Outdoor Media Association (OMA)

The OMA is the peak industry body representing the businesses that provide services to the OOH advertising industry including companies that own signs, display advertisements and develop campaigns. Collectively, OMA members generate close to 80 per cent of OOH advertising revenue in Australia.

The OMA is the voice of the sector, working to build a more sustainable future for its members by developing relationships with its stakeholders and showcasing the creative and economic potential of the media channel.

The OMA provides leadership across four key functions: audience measurement and data management; marketing and communications; government relations; and member services in the areas of policy, advocacy and training.

Governance

The OMA is governed by a Board of Directors who are elected by members. The Board met four times in 2020.

All OMA members commit to abide by the industry's Code of Ethics which mandates members to adhere to 18 self-regulatory codes that govern how OOH advertisements are displayed.

The OMA operates nationally. It was first incorporated on 1 August 1939 as the Outdoor Advertising Association of Australia (OAAA), rebranding as the Outdoor Media Association in July of 2005.

MOVE (Measurement of Outdoor Visibility and Exposure)

Delivering value for advertisers means being able to demonstrate who is paying attention and where. MOVE is a web-based platform that generates data by measuring audiences across Australia's five major capital cities. These audience results help prove the efficacy of, and simplify the process of planning and buying, OOH advertising.

MOVE measures all OOH advertising formats across a range of locations including:

- airports
- office buildings, cafés, gyms, shopping centres and universities
- railway stations and concourses
- roadsides
- public transport including bus/train/tram/light rail internal and external signs

MOVE is the only OOH audience measurement system in Australia to be endorsed by the Media Federation of Australia (MFA) and the Australia Association of National Advertisers (AANA).

Governance

MOVE is owned by a group of shareholders who appoint the Board of Directors. The MOVE Board met four times in 2020.

Companies measured by MOVE

- BIG Outdoor
- Bishopp Outdoor Advertising
- goa
- JCDecaux
- oOh!media
- Outdoor Systems
- QMS Media
- TorchMedia

Who uses MOVE

MOVE was accessed monthly by an average of 590 users to determine the potential audiences for individual signs, multi-format campaigns and customised communications packages. Overall, 1,050 agency users and 350 OMA members accessed the platform a total of 40,800 times.

Training

MOVE offers a national training program for the buyers and sellers of OOH advertising in Adelaide, Brisbane, Melbourne, Perth and Sydney. Training sessions took place face-to-face in quarter one, then when restrictions limited physical gatherings, were held virtually from April onwards.

In total, 423 people attended MOVE training in 2020. This included 322 media agency staff and 62 OMA members who attended software training, 20 members who attended site classification training and 19 OMA members and media agency staff who attended methodology training.

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Who we reach and when

MOVE (Measurement of Outdoor Visibility and Exposure) has begun a process of evolution, extending the capabilities of the industry's trusted Out of Home (OOH) audience measurement system to measure the impact of digital signs.

“Ipsos is proud to be partnering with the Outdoor media sector in Australia to leverage our world-class IP to deliver sophisticated measurement services to the Australian market to help accelerate the industry’s transition to digital.”

Simon Wake, CEO, Ipsos Australia and New Zealand.

How MOVE works

MOVE was launched in 2010 following five years of extensive research and testing. MOVE enables advertisers to measure audiences that see their OOH campaigns.

Data is power – and MOVE has directly contributed to the growth of the Outdoor industry, delivering actionable insights through data that has helped advertisers reach the right people, with the right message, at the right time.

MOVE also simplifies the planning and buying of OOH by producing results on target audiences for any combination of OOH signs. Data includes both numbers of people and a spatial mapping of the reach of a campaign in relation to target audiences.

MOVE measures the Opportunity to See (OTS) in terms of potential audience and refines this to report the Likelihood to See (LTS), which is an assessment of how likely a person is to see an OOH sign. This ensures campaigns can be planned and bought with greater confidence that messages will reach their target audience on their daily travels.

LTS is produced by using a dynamic dataset of visibility factors incorporating modes of transport, the speed of travel, the audience vantage point, the size of the sign and the way the signage is illuminated.

MOVE currently measures 78,700 signs in Adelaide, Brisbane, Melbourne, Perth and Sydney.

Ensuring integrity

Built into the MOVE platform are compliance tools that aid the industry in managing its self-regulatory policies. The School Mapping Tool ensures that OMA members' signs comply with the OMA's Placement Policy that prohibits products for sale to minors, such as alcohol, adult services, and discretionary food – within 150m of primary and secondary schools.

The School Mapping Tool accurately maps the locations and boundaries of 30,667* schools in NSW, QLD, SA, VIC and WA, to ensure that the industry and advertisers comply with the OMA's policies.

Data update

The annual update of the data in MOVE maintains the stability and credibility of the system. This is important because the underlying audience measurement in MOVE reflects an average typical week, and not audience variations such as those seen during the pandemic. It also provides MOVE users with a tool to compare current audience numbers with the previous year's audiences.

The MOVE data update included additions of new signs, changes to existing signs and updates to significant buildings, transport routes and public transport timetables.

*Previously reported numbers have been adjusted due to changes in how schools are mapped.

Digital measurement

For a decade the Outdoor industry has made substantial investments in a network of responsive, flexible and effective digital signs. As advertisers demand more tangible proof that their messages hit the mark, a new metric is needed to benchmark and measure the impact of Digital Out of Home (DOOH) signs.

In 2018, up to \$10M was committed to enhancing MOVE to measure the audiences for digital signs. In 2020, the OMA finalised a tender and appointed global media measurement experts Ipsos to evolve MOVE and enhance its capabilities.

The updated system will deliver a national measured model that covers all formats and environments, including regional locations, with the capability to report on seasonal and monthly variations. In total the system will measure more than 100,000 OOH locations nationwide.

The existing LTS metric used in MOVE will be replaced by Visibility Adjusted Contacts (VAC) and a qualitative audience score added based on neuroscience. The update will also include new reporting software using a web-based interface to access audience results. The new system is expected to take two years to build and test, with a launch to market anticipated in 2023.

“The dominance of Digital Out of Home (DOOH) is an innovation, therefore updating our audience measurement system has to be part of our channel’s transformation. Providing transparent and tangible proof is imperative for us to prove DOOH’s efficacy to our clients.”

Grant Guesdon, MOVE 2.0 Lead.



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Leadership

Chairman's Message

This message is a chance for me to reflect on the past year – this is no easy task. The 2020 year started for me with the morning sky turning to red and then black as my crew and I sailed back to Sydney after competing in the 2019 Sydney to Hobart yacht race. This was not just my experience, but how most of us saw in the new year, with bushfires blanketing many of our major cities and regional centres in choking smoke.

This experience was horrifying enough, but we had no idea then that around the corner was a rapidly developing global pandemic which pushed aside the fires and the floods that followed. I don't think any of us could have predicted the rapid escalation of COVID-19 at that point in time.

The social and economic costs of the pandemic that followed forced us to reassess everything we thought we knew. As a community, Australians had to find deep reserves of resilience as we navigated a fast-changing world that dramatically changed our way of life.

As an industry, we had to quickly grapple with the devastating impact of lockdowns and restrictions. The subsequent decline in our audiences resulting in the plummeting of industry revenues sent out shockwaves across our entire industry.

The impact was sharp and swift and saw net media revenue decrease 39.4 per cent to \$566.5M in 2020, down from \$935.5M for 2019. In the hardest hit second quarter 2020, revenue dipped 65 per cent compared to the same quarter the year prior.

I am proud of how the Out of Home (OOH) industry stepped up to the challenge by supporting the public health response. It was reassuring to see our members' networks of digital signs used by advertisers and government to broadcast information to what was now our new hyper-local world. With information changing rapidly, our digital signs were able to respond quickly with important tailored messages reaching the right audiences at the right time.

Our signs also helped enliven and welcome people back into our public spaces when lockdowns and restrictions were lifted. Our national campaign *Spring into Out of Home* was an optimistic reminder that many of us were happier when we were allowed outdoors and that we were looking forward to visiting restaurants, shopping centres and socialising again.

The early indicators of recovery were reflected in our quarter three revenue results, which pulled back the year-on-year decrease to 56 per cent. This was followed by quarter four where there was a decrease in revenue of 33 per cent.

Revenue from digital signs grew once more to account for 56.1 per cent of net media revenue, an increase over the 55.8 per cent of total revenue in 2019.

For 10 years, the industry's audience measurement system MOVE (Measurement of Outdoor Visibility and Exposure) was and remains the world-leading OOH audience measurement system. As the industry has further invested in broadening its digital network of signs there has also been recognition that these signs need to be measured differently.

In 2020 the OMA appointed media measurement experts Ipsos to evolve MOVE. MOVE 2.0 will cover all OOH formats, locations and environments nationally, with the capability to report on seasonal and monthly variations and crucially will measure the impact of digital signs.

Added to this will be an innovative new qualitative metric which is based on a large neuroscience project run by the OMA with advertising neuroscience experts Neuro-Insight. The metric will provide buyers with a tool to use in conjunction with reach and frequency reports to assess the impact and effectiveness of both static and digital signs, providing further proof that advertisers are spending their money wisely.

As I write this, Australia is at a turning point as our health system prepares to roll out the COVID-19 vaccination program. The pandemic is not behind us yet, but I am confident we are looking at brighter days ahead. Our cities will again become dynamic places where the creativity and innovation will flourish, and our OOH signs will continue to entertain and inform the public.

To the OMA and MOVE teams, to the Board, and to our many partners, thank you for the resilience and support you have shown. Despite the considerable disruption to our industry during this period, much has been accomplished which will prove critical to our industry's recovery and growth during the years to come.



Charles Parry-Okeden
Chairman, OMA and MOVE

**FRESHEN UP
BEHIND THE
MASK.**



eclipse

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CEO's Message

Our ubiquity and our ability to reach mass audiences are two of our channel's strengths and they have been the catalyst for our growth in the last 10 years.

Losing our audience, in a year that we were told to stay home and stay safe to 'stop the spread' was not what we had planned for. I expect this to be a common message in many Annual Reports published this year.

What you might not read is how critical our signs were in helping to get public health messaging out. While the commuting public and visitors to our cities were curtailed, people were still out and about in large numbers, albeit locally. Reminding the people on the move to wear their mask, wash their hands, keep their distance and get tested became the signs of our time in 2020.

When everything fell quiet, our signs remained ubiquitous and even more so the iconography in a radically different street, suburban and cityscape, and their messages reflected our new reality.

While the pandemic was a huge focus of 2020, we still continued many of our programs. We supported National Missing Persons Week for the twelfth year with an OOH campaign valued at over \$1M, taking the donation over the life of the partnership to close to \$7M.

The theme in 2020 was *I'll see you later* which profiled the heartbreaking stories of missing persons in the hope that they would resonate, spark a memory, and encourage people to come forward with information.

We also promoted our campaign *Children inherit more than your looks* which ran in partnership with DrinkWise. This is the third and final year which saw our industry donate \$5M of media space reaching over 11M people in an effort to remind adults that their drinking behaviour is one of the major influences on their children's future drinking habits.

As the lockdowns and restrictions disrupted the rituals and traditions we hold dear, we used the power of our signs to unite people from afar by supporting the RSL's campaign *Light Up the Dawn*. *Light Up the Dawn* asked Australians to light a candle somewhere outside their residence, be it a balcony or a driveway, to commemorate our armed forces past and present as a way of marking Anzac Day, when all the marches were cancelled. The initiative was put forward by the Queensland branch of the RSL, which we promoted nationwide on our digital network of signs.

In July, we launched the OMA National Health and Wellbeing Policy restricting the advertising of discretionary foods and drinks on our signs.

The policy extended the restrictions we already have in place for alcohol, gambling and adult products to add to the list discretionary foods and drinks that are prohibited from being advertised within a 150m boundary of primary and secondary schools across Australia.

We extended our commitment even further, pledging a \$3M campaign each year to promote healthy diet and lifestyle choices.

We strive to be leaders when it comes to issues impacting the community, and that means being an active supporter of government efforts to tackle major issues such as overweight and obesity in Australia.

Living through 2020 meant living during the most challenging year on record for all of us, including our industry. Watershed moments like this can help propel us to be innovative, to change and to grow. This was true for our industry and for many of us personally. The pandemic brought us closer together and encouraged us to unite. With our Board we put together a new business plan, which has given us a roadmap of how we navigate out of this slump faster.

While we saw some green shoots by the end of quarter four last year, as I write this in 2021, I am seeing a rapid recovery. Australia has moved into positive economic growth faster than we expected and the Outdoor industry is reflecting that trend.

My thanks to the Board and the OMA and MOVE teams who made many sacrifices during the pandemic to keep the industry afloat and to keep our team together. Having the same team going into the pandemic and coming out of it, when the industry took such a huge revenue cut, is for me one of our great achievements and reinforces our commitment to our people.



Charmaine Moldrich
CEO, OMA and MOVE



OMA and MOVE board of directors

Charles Parry-Okeden,
Independent Chairman
EXECUTIVE CHANNEL HOLDINGS

Charles has 30 years of media experience across radio and Out of Home advertising. He is co-founder and CEO of Executive Channel Holdings (ECN) and Australian Media Channel Pty Ltd (Media i and Mi-3), as well as the president of Media Eye France. Charles joined as the Independent Chairman of the OMA and MOVE in 2019.



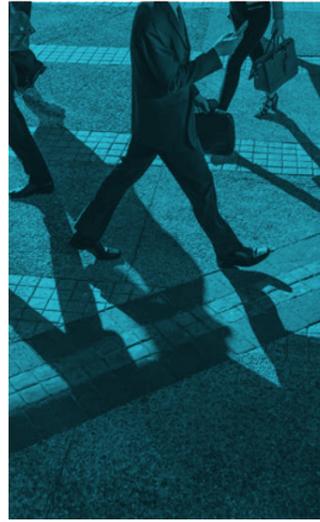
Brad Bishopp
BISHOPP OUTDOOR ADVERTISING

Brad is the Managing Director, CEO and co-founder of Bishopp Outdoor Advertising. An advocate for industry professionalism and contributing to the community, Brad recognises Out of Home advertising as a key contributor to local and national business growth. This is demonstrated through Bishopp's Queensland membership to the OMA since 1995. Brad was a Director of the OMA Board from 2006 to 2017 and rejoined in 2020.



Brendon Cook
OOH!MEDIA

Brendon Cook founded oOh!media in 1989. With over 41 years' experience in Outdoor advertising, Brendon has been at the forefront of the Out of Home advertising business and helped pioneer the industry's move into digital. Brendon led the acquisition of Adshel in 2018, becoming responsible for over 850 employees spread across offices in all capital cities in Australia and New Zealand to help advertisers deliver powerful integrated campaigns across audience-led advertising solutions. In December 2020 Brendon retired from oOh!media and also from the OMA Board after serving as a Director of the OMA and MOVE since 2003. He will be replaced at oOh!media by Cathy O'Connor in 2021.



Robbie Dery
OOH!MEDIA

Robbie's 25-year career spans aviation, financial services and media sectors across the UK, European and North America. Since 2008, Robbie has led oOh!media's airport and billboard, Qantas Lounge and inflight entertainment, rail and street furniture businesses. Robbie is also responsible for oOh!media's Product Strategy Division, which, through oOh!'s Datascience™ capability, delivers audience-led media solutions at scale. Robbie has been recognised with many Moodie Davitt awards for his innovative approach to developing unique and engaging Out of Home media platforms. Robbie joined the MOVE Board in 2020.



Noel Cook
OOH!MEDIA

Noel has 30 years of experience in the Out of Home industry, covering all critical business functions from sales to product development, asset rollouts to operations, and commercial contract management to business development. He has been closely involved with the OMA through committees and various support functions for the last 15 years. Noel joined the OMA Board in 2019.



Kirsty Dollisson
TORCHMEDIA

Kirsty has 24 years of Out of Home experience across Boyer Group, EyeCorp and TorchMedia. She launched the TorchMedia brand for the Claude Group in 2007 and has since been the driving force behind developing the company's dedicated transit media product in Australia. Kirsty is the Chair of the OMA Sales and Marketing Committee and has been a Director of the OMA since 2017.



Max Eburne
JCDECAUX

Max has over 21 years of experience in the media sales industry, 13 of which have been with JCDecaux. Starting out as an Associate Director in the UK in 2006, Max then moved to Australia to take on the General Manager of Sales and Marketing role in 2009, and in 2018 was promoted to Chief Commercial Officer after the acquisition of APN Outdoor. Max oversees the strategic management and growth of the business's advertising sales and ensures advertising and marketing strategies for JCDecaux signs are optimally matched to achieve clients' sales objectives. Max joined the MOVE Board in 2019.

Andrew Hines
JCDECAUX

Andrew has more than 25 years of experience in the Out of Home industry and is the Chief Operating Officer of JCDecaux. Andrew's career began at Cody Outdoor and he was later the Chief Financial Officer of APN Outdoor. He became Chief Operating Officer of APN Outdoor in 2006 before it was acquired by JCDecaux in 2018. Andrew joined the OMA Board in 2019.



Steve O'Connor
JCDECAUX

Steve has over 30 years of experience in the Out of Home industry having started as Sales Manager with Buspak in 1990, promoted to Sales Director in 1993 and then appointed CEO of Buspak Hong Kong three years later. Steve returned to Australia in 1998 to become CEO for Buspak Australia and New Zealand. During his six years in this role, Steve grew the organisation and established himself as a dynamic and leading force in the Out of Home industry. In 2004, Steve joined JCDecaux Australia as CEO and is currently responsible for circa 500 staff and a varied portfolio including street furniture, billboards, airports and transit advertising in Australia and New Zealand. Steve has been a Director of the OMA and MOVE since 2004.



John O'Neill
QMS MEDIA

John has over 25 years of experience in the Out of Home industry developing and leading sales teams at QMS Media, EyeCorp, Media Puzzle and oOh!media. As CEO of QMS Media, John is instrumental to the business's continued strong growth profile and performance as he leads and manages the premium, high impact Australian media business. John has been a Director of the OMA and MOVE since 2018.



Chris Tyquin
GOA

Chris is a 30 year plus veteran of the Out of Home industry and is one of the most experienced professionals in the business. A former Chairman of the OMA, he has been responsible for some of the industry's most innovative research studies and played a key role in the development of MOVE. Chris has been a Director of the OMA since 2004 and of MOVE since 2007.



David Scribner
OOH!MEDIA
(resigned June 2020)

Andrew Tyquin
OUTDOOR SYSTEMS
(resigned June 2020)

OMA and MOVE teams

Charmaine Moldrich
CEO, OMA and MOVE

Charmaine has 40 years of experience in leadership, management, marketing, communications and business development across a variety of sectors including the arts, media, higher education, and government. Charmaine is uniquely positioned to lead industry growth in a rapidly-changing, technology driven world. Charmaine has been CEO of OMA and MOVE since 2010. Charmaine is a non-voting member and public officer on the OMA Board, and an appointed Director on the MOVE Board.



Jorge Barbosa
MOVE Assistant, MOVE

Jorge is responsible for the day-to-day management of MOVE, data updates and school mapping; providing help-desk functions to system users, and general IT, finance and HR support for the team. Jorge joined MOVE in 2020.



Kylie Green
General Manager, OMA and MOVE

Kylie is responsible for the day-to-day management of both the OMA and MOVE. Kylie project managed the building of CORE (Centralised Outdoor Response Engine), the new platform for planning and buying Out of Home. Kylie has been with the OMA since 2012.



Julie Jensen
Marketing Director, OMA and MOVE

Julie has over 20 years of marketing and advertising experience, with the last ten years being dedicated to association marketing. Julie is responsible for rolling out the *Look Up* campaign and various promotions to communicate the value of Out of Home to media and creative agencies, and advertisers. Julie first joined the OMA in 2013, took a three-year sabbatical, and returned in 2018.

Ganjina Nozakova
Systems and Training Manager, MOVE

Ganjina joined MOVE in 2019 as Client Services Administrator before progressing to Systems and Training Manager, responsible for managing the day-to-day operations of MOVE and the delivery of its training programs. Ganjina holds a Bachelor of Business and has worked in various sales, interpretation and recruitment roles prior to joining MOVE.



Kirsten Samuels
Senior Policy Advisor, OMA

Kirsten is responsible for supporting the policy and government relations function at the OMA, advocating to key stakeholders for the best possible policy and regulatory environment for Out of Home. She has experience working at all levels of government, starting her career at a local council before working as a Policy Advisor at ClubsNSW, a NSW Government Minister's office, and Suicide Prevention Australia. Kirsten joined the OMA in 2019.

Alexandra Simpson
Communications Specialist— Government Relations, OMA

Alexandra develops communications to support the Government Relations team's strategy and the OMA's outreach with government, key stakeholders, and members. She also assists members with advertising copy advice on how to comply with the industry's self-regulatory codes. She has previously worked for the French-Australian Chamber of Commerce and held various roles in marketing and events in the retail, property and recruitment industry. Alexandra joined the OMA in 2019.



Madeleine Thomas
Marketing and Office Assistant, OMA and MOVE

Maddie is responsible for the coordination of social media content, digital communications, updating the website, and managing the quarterly Creative Collection competition. Maddie joined the OMA in 2020.



Emma Ward
Communications Manager, OMA and MOVE

Emma is responsible for developing and executing the communications strategy for the OMA. She holds a Bachelor of Arts and has several years of experience in marketing and communications. Emma joined the OMA in 2019.



Emma Carr
General Manager, Government Relations, OMA

Emma oversees the development of the strategy and management of government relations across federal, state and local governments. She has 19 years of experience in various communications and government relations roles across the private, public and charitable sectors. Emma joined the OMA in 2019.



Grant Guesdon
MOVE 2.0 Lead

Grant has over 15 years of experience in media planning and buying, and 22 years of experience in Out of Home audience measurement. He oversees the evolution and development of the industry's new digital audience measurement system which will be launched in 2023. Grant has been with MOVE since 2009.



Martine L'Eveille
EA to the CEO
(resigned October 2020)

Reagan Ruppell
Marketing and Office Assistant
(resigned October 2020)

5

Supporting the community

The success of Out of Home (OOH) advertising is that it broadcasts to large audiences 24/7 in busy and well-trodden public spaces. Outdoor Media Association (OMA) members understand that this is a privilege, and it is incumbent on the industry to be responsible and to give back.

Giving back was more important than ever in 2020 as working together for the common good became the crux of everyday life. The Outdoor industry's community initiatives and partnerships amounted to \$92M of OOH advertising space donated to important causes and organisations. **p.50**

The industry also came together to support a variety of cause-driven campaigns.

Light Up the Dawn

Anzac Day was one of the first major national events to be affected by lockdowns. With marches and attendance at clubs and other venues banned, the RSL coordinated a virtual event, *Light Up the Dawn*.

The OMA supported *Light Up the Dawn* with a national campaign that encouraged people to participate and show their support for veterans from home. People could pledge their involvement in an at-home vigil at 6am on Anzac Day and through this honour and remember those who had served the nation.

Amber alerts

In 2019 OMA members partnered with Brisbane City Council to pilot the delivery of amber alerts on OOH signs. An amber alert supports law enforcement by urgently broadcasting details about missing children or child abductions. Research has shown that getting the message out about missing children as quickly as possible is vital.

OMA members' networks of digital signs that broadcast 24/7 and are seen by 93 per cent of Australians every day are a powerful tool for raising the alarm when a child goes missing.

The pilot has informed the development of a national system which will be rolled out in 2021 in partnership with police in each state and territory.



CASE STUDY

oOh!media #OurSecondChance

The World Out of Home Organisation's (WOO) campaign *#OurSecondChance* invited the public to consider the positive outcomes of their pandemic experience and what they had learned to value about their local environment, community and loved ones.

oOh!media took the environmental angle of the creative one step further, choosing to print the campaign on a sustainable print substrate. The posters were printed by Cactus Imaging using Yuppo, a synthetic paper which is 100 per cent recyclable.

As Victoria was in its extended second lockdown the campaign was heavily weighted to relevant locations to provide positive and thoughtful messaging.



“At Cactus, and oOh!media more broadly, we are always looking for more sustainable ways to operate, and this is a nice demonstration of that approach. We'd also recommend Yuppo as a great choice for advertisers looking to enhance their sustainability credentials in print.”

Nigel Spicer, General Manager, Cactus Imaging.

“This year Anzac Day will be different, and we want every Australian to have an opportunity to take part in this important national moment of appreciation for service people past and present. The qualities evoked by the ANZAC spirit – ingenuity, humour, endurance, courage and mateship – are important now more than ever.”

Tony Ferris, State President, RSL Queensland.



DrinkWise in lockdown

For the past three years the OMA has partnered with DrinkWise to encourage parents to reflect on how their drinking choices affect their children’s perceptions about the consumption of alcohol. Since the partnership began in 2018, more than \$5M in OOH advertising space has been donated in support of the *Children can inherit more than your looks* campaign.

In 2020, OMA members supported a new partnership between DrinkWise and NSW Police that addressed excessive use of alcohol during the lockdowns. The campaign *Pick up the phone, not another drink* encouraged people to reach out for help if stress and isolation was taking a toll and directed those struggling towards various organisations that can assist with mental health and wellbeing.

National Missing Persons Week

The OMA’s collaboration with National Missing Persons Week which publicises the plight of missing persons entered its twelfth year and its sixth year as a national partnership with Australian Federal Police. The campaign *I’ll see you later* showcased the stories of people from around the country who are still missing. It is hoped that by putting a human face and a relatable story to the plight of missing persons and their families, more people would come forward with information. In 2020, the campaign was valued at over \$1M.

Help Aus

The bushfires that swept through large parts of the country at the beginning of the year devastated cities, communities and ecosystems. The Out of Home Advertising Association of America (OAAA) and OUTFRONT Studios repented to the bushfire crisis with a generous campaign to raise funds for affected native wildlife.

The *Help Aus* campaign ran on OOH signs across the US in January, including Time Square, calling on Americans to donate to wildlife rescue organisation WIRES (Wildlife Information, Rescue and Education Service). We thank our US colleagues for their care and generous support.



“The impact of the Outdoor Media Association’s contribution [to National Missing Persons Week] is invaluable, and the NMPCC values this important partnership. We look forward to continuing our work together to create awareness and reduce the incidence and impacts of missing persons in Australia.”

Jodie McEwan, Coordinator, National Missing Persons Coordination Centre (NMPCC).



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Creativity in a pandemic

A celebration of creativity in Out of Home (OOH) advertising is a celebration of public art that informs, engages and inspires – always open and always on.

“Every brand has come out with a COVID ‘reassurance’ campaign in these ‘unprecedented times’. The refreshing creative media approach from Broadsheet, directs customers to empty tables in struggling restaurants with location specific digital Outdoor, creatively executed to feel like a live listing while avoiding COVID clichés.”

Russ Tucker, Executive Creative Director, TBWA \ Eleven.

OOH advertising is not just a means for advertisers to reach consumers – it is also a blank canvas that can be used by artists and writers to broadcast arts and culture to entertain, inspire and start conversations. In a year when the arts industry was forced to close their doors, OOH continued to broadcast adding colour, humour and inspiration in the public domain. The OOH canvas was taken up by many advertisers who wanted to engage with audiences in a different way.

We saw many advertisers change quickly to update their brand messages to be empathic as new information about the pandemic came to light.

Advertising on signs shifted from pure brand and product messages to providing helpful information, to promoting local business, to making more connections with people with messages of hope and solidarity.

Outdoor Media Association (OMA) members adapted rapidly to the needs of the moment, delivering important public health messaging and information about government announcements and programs.

The themes of 2020 are reflected in the work judged in the Creative Collection competition.

Creative Collection

Launched in 2013, the Creative Collection celebrates the big, bold, and audacious canvas that is OOH by recognising exceptional campaigns each quarter. In 2020 there were a total of 81 entries across the four quarters.

Entries highlighted the ability of creative teams, advertisers and OMA members to speak to the reality of the pandemic. As people became less global and more local, campaigns evolved to deliver hyper-local messaging. This was super-charged on digital signs where location specific data could be used to target specific audiences. This data-driven, hyper-local phenomenon was aptly demonstrated by a campaign *Restaurant Live Lists* by Broadsheet in partnership with JCDcaux. This campaign won its category in the quarter two Creative Collection competition and also was the joint winner of the 2020 Grand Prix with *Proud and Punch* by Peters.

In the Creative Collection competition campaigns are entered across four categories:

- Big, Bold, and Bright
- Best Use of Multi-Format
- Best Use of Digital
- Innovation in Out of Home

Each quarter a mixture of judges including OMA members, advertising and media agencies and advertisers are invited to be on the judging panel.

Thank you to the 2020 judges:

- Peter Bailey, General Manager, Bailey Print Group
- Adam Cadwallader, CEO, Motio
- Phil Eastwood, CEO, BIG Outdoor
- Mark Fairhurst, CCO, QMS Media
- Natalie Hocking, Manager, Marketing Strategy and Sponsorship, RACQ
- Diana Ilinkovski, Marketing Director, STAN
- Matthew Michael, Manager Director, The Monkeys
- Charmaine Moldrich, CEO, OMA
- Oliver Newton, General Manager of Sales, JCDecaux
- Darren Olliffe, Director of Brand Health Tracking and Creative Development, Ipsos
- Guy Patrick, Creative Director, The Works
- Josh Steel, Group Sales Manager, goa
- Paul Swann, Executive Creative Tinker, Thinkerbell
- Russ Tucker, Executive Creative Director, TBWA\Eleven
- Emma Ward, Communications Manager, OMA
- Elly Whitehouse, Senior Graphic Designer, Bishopp Outdoor Advertising
- Claire Woods, Head of External Communications and Digital Marketing, oOh!media



Grand Prix judges:

- Paul Swann, Executive Creative Tinker, Thinkerbell
- Thomas Tearle, CEO, VMLY&R

2020 Creative Collection Winners

Creative Collection Winners QUARTER 1	Creative Collection Winners QUARTER 2	Creative Collection Winners QUARTER 3	Creative Collection Winners QUARTER 4
<p>Big, Bold and Bright <i>Australian Open 2020</i> by KIA</p> <p>Honourable mention <i>Schweppes</i> by Schweppes</p> <p>Best Use of Multi-Format <i>Messages of Kindness, Consideration and Compassion</i> by oOh!media and Junkee Media</p> <p>Best Use of Digital <i>Proud and Punch</i> by Peters (2020 Grand Prix)</p> <p>Innovation in Out of Home <i>Doritos - Food Truck Flavours</i> by Pepsi Co (Quarter one Grand Prix)</p> <p>Honourable mention <i>SUV & LCV 2020</i> by Renault</p>	<p>Big, Bold and Bright <i>Binge - Feel a binge coming on?</i> by Streamotion Binge</p> <p>Honourable mention <i>Summer 2019/20</i> by Bundaberg Brewed Drinks</p> <p>Best Use of Multi-Format oOh!media and the National Gallery of Australia <i>launch the nation's largest art event</i></p> <p>Best Use of Digital <i>Restaurant Live Lists</i> by Broadsheet and JCDecaux (Quarter two Grand Prix and 2020 Grand Prix)</p> <p>Innovation in Out of Home <i>Menulog LAM and Brand</i> by Menulog</p>	<p>Big, Bold and Bright <i>Eclipse Mask</i> by Mars Wrigley</p> <p>Honourable mention <i>Darrell Lea Makes it Better</i> by Darrell Lea</p> <p>Best Use of Multi-Format <i>Realestate.com.au Spring</i> by REA Group</p> <p>Honourable mention <i>Local Luvva</i> by BWS</p> <p>Best Use of Digital <i>Now You're Cooking</i> by Barbeques Galore</p> <p>Innovation in Out of Home No winner was awarded</p>	<p>Big, Bold and Bright <i>Tortilla Pockets - Launch into Mess Free Mexican</i> by General Mills</p> <p>Honourable mentions <i>Monkey Shoulder</i> by William Grand & Sons <i>Forever Original</i> by Coopers</p> <p>Best Use of Multi-Format <i>Launching Flipspot - the App</i> by Flipspot</p> <p>Best Use of Digital <i>MyPayNow</i> by MyPayNow</p> <p>Honourable mention <i>Financial Wellbeing</i> by ANZ</p> <p>Innovation in Out of Home No winner was awarded</p>



“Outdoor, when done well, is so impactful. It has the power to grab attention, land a message and influence audiences in just a glance this, in tandem with today’s new technology, makes it more compelling, more targeted and more interesting than ever.”

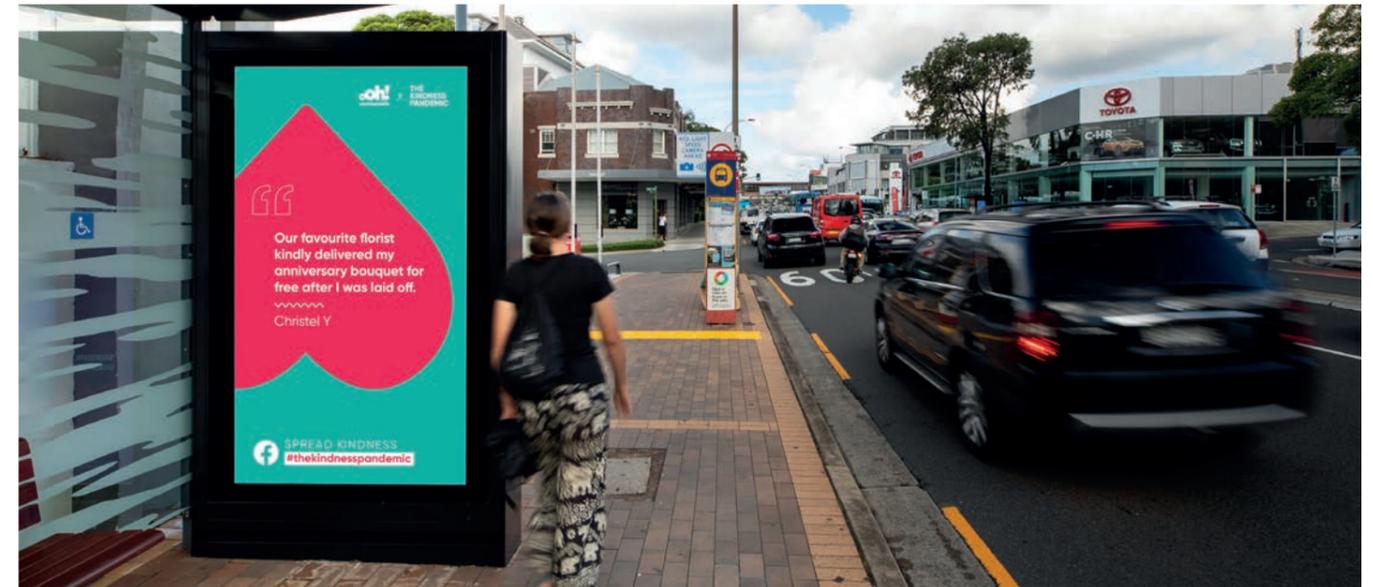
Matthew Michael, Managing Director, **The Monkeys.**

The campaigns of COVID-19

The freedom to travel and a love of the great outdoors are values essential to the Australian way of life. So, it was no surprise the impact of lockdowns and restrictions that saw shops close, holidays cancelled and people retreat indoors, fuelled the desire of Australians to be out and about once more.

As the country grappled with its response to the pandemic, OOH stepped up to support the community, spread government health advice and provided a bright spot in the darkest of days. Outdoor Media Association (OMA) members spoke from the heart, used humour, became more adept at communicating with a hyper-local audience and joined the collective effort to stop the spread of COVID-19 and help save lives.

These campaigns and initiatives served as a reminder that the simplest messages on OOH often work best. While it was a year that was anything but straightforward, the industry demonstrated the power of its signs to unite communities to work as a team and to get through the pandemic together.



“oOh!media’s Kindness campaign captured the zeitgeist during COVID-19. oOh!media was quick to react in a time when people needed to be reminded to be kind and act with everyone’s best interest at heart. Kindness, reflected a more thoughtful sentiment in the community. The timely nature of this campaign embodies the power of Out of Home, to positively influence communities.”

Charmaine Moldrich, CEO, OMA and MOVE.

CASE STUDY

Bailey Outdoor Advertising

When the global pandemic upended Bailey Print Group's business model and they were facing the prospect of standing down staff, innovative thinking saved the day. It also potentially saved lives as they rapidly re-tooled their sign and printing business to produce vital medical equipment.

In the early weeks of the pandemic, critical personal protective equipment (PPE) was in short supply as global freight movements slowed to a trickle. Australian governments called on local businesses to step into the breach and redeploy any spare capacity for manufacturing equipment including face shields for healthcare workers and other frontline staff.

Bailey stepped up and transformed their business to manufacture reusable face shields. This not only helped resolve a critical shortage immediately, it also increased Australia's long-term capacity to rely on onshore, local manufacturers for these crucial items.

Using their own in-house technology, machinery and expertise, the team researched and prototyped various types of face shields before settling on a final design. Their first face shield, the Shield Pro, was designed for use by government health departments, hospitals, aged care facilities, medical practices, health and beauty practitioners as well as everyday Australian businesses.

Their second shield, Invershield, was made for customer service and retail workers whose jobs present challenges in maintaining a safe social distance from others. Both products have been approved by the Therapeutic Goods Administration and certified Australian-owned and made.

A new venture, Bailey Protection Gear was born and received its first order of 400 face shields within three days. This was soon followed by an order of 1,000 shields for a QLD hospital. Once production began, the business was soon operating 22 hours a day, six days a week to meet demand.

The enterprise has since secured a contract with Queensland Health to supply 20,000 face shields. Bailey Print Group is also shipping its products to hospitals and healthcare workers around the country.

“Our business was built on the ethos of keeping manufacturing in Australia. Supporting the Australian economy and supplying local jobs is our greatest achievement. Seeing the vulnerability of our economy during this pandemic has made us even more passionate about supporting local suppliers and manufacturing within Australia.”

Samantha Bailey-Jensen, Business Development Manager, Bailey Print Group.



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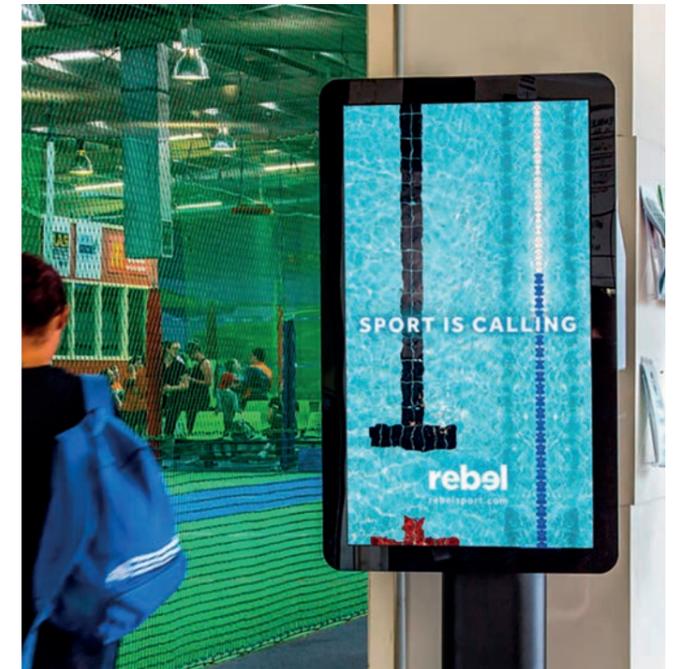
Embracing innovation

The agility and resilience of Digital Out of Home (DOOH) enabled advertisers to react to the moment, providing the flexibility they needed to keep their brands switched on.

The flexibility of DOOH and its ability to change messaging rapidly as circumstances change made it an essential tool in navigating 2020's challenges while driving creative innovation.

The rise of multi-sensory DOOH campaigns and experiences meant that messages could be delivered through immersive interaction with the audience. New smartphone technologies and the increasing digitisation of administrative, security and retail services meant that DOOH was an ideal platform for the use of embedded QR codes and click-and-collect contactless delivery promotions.

DOOH also played an important role in the government's pandemic response strategy, using technology and data to tailor and deliver messages to precise locations.





CASE STUDY

Using data in a pandemic

When the pandemic hit and lockdowns affected how people moved around, OMA members used mobile data to show advertisers where their audiences were and how they could be reached.

JCDecaux knows that Shift Happens

JCDecaux partnered with Adsquare to accurately track people as they moved, using data from mobile phones. The detail and sophistication the data offered meant JCDecaux could provide highly accurate information about audiences who were within 60 metres of a JCDecaux sign.

What JCDecaux learned was that while people were moving about in different ways, they didn't disappear – they would re-emerge close to their homes, travel for essential purposes and use their time outside wisely.

Insights like these have since led to innovations like Shift Happens, which included initiatives to fast-track printing for certain signs so brands could get time sensitive messaging up quicker, data intelligence reports, and a new JCDecaux street furniture network created to specifically target local communities.

oOh!media keeps its finger on the pulse

Staying one step ahead, meant staying on the pulse of the constant change that was sweeping the nation. Advertisers needed confidence in the medium hit hard by stay-at-home rules.

In response, oOh!media released weekly COVID-19 Pulse Reports drawn from over 4,000-plus locations and using data captured from millions of mobile devices, backed up by transaction data taken from over three million Australians and insights from surveys about consumer attitudes from 4,400 people.

oOh!media released a total of 26 Pulse Reports in 2020, and the insights contained in these reports formed the backbone of the joint industry campaign *Spring into Out of Home* that was run on several OMA members' signs in October and November 2020.

Transparency wins out for QMS Media

Adjusting to the new realities of the pandemic saw QMS Media turn to its own audience platform DYNAMIQ and using DSpark for mobility data to track audiences hourly and in real-time.

When advertisers were asking for more flexibility and proof for their campaigns, QMS were able to respond with weekly audience reports giving advertisers the comfort of additional transparency.

In addition, QMS put in place an audience guarantee to promise advertisers the same number of people for their campaigns as the year before.

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Being responsible

The Outdoor industry is committed to upholding community standards and operating responsibly in the public domain. The Outdoor Media Association (OMA) and its members regularly work with government and other stakeholders to ensure that policies are appropriate, practical and effective.

All OMA members must adhere to the OMA Code of Ethics and a set of specific policies within the Outdoor industry's self-regulatory framework.

The OMA works closely with Ad Standards, the Australian Association of National Advertisers (AANA), The Communications Council and the Alcohol Beverages Advertising Code to ensure advertising displayed by OMA members aligns with industry best practice and meets community expectations.

There are 10 additional self-regulatory advertising industry codes of practice administered by these stakeholder organisations.

In total, 18 specific self-regulated codes and policies govern OMA members and the wider OOH advertising industry.

Overview of self-regulation framework

The OMA endorses the display of advertising that adheres to the following 18 self-regulatory policies and codes of practice:

OMA Code of Ethics

OMA Advertising Content Policy

OMA Digital Signage Policy

OMA Alcohol Advertising Policy

OMA National Health and Wellbeing Policy

OMA Political Advertising Policy

OMA Placement Policy

OMA Environment and Sustainability Policy

AANA Code for Advertising and Marketing Communications to Children

AANA Code of Ethics

AANA Environmental Claims in Advertising and Marketing Code

AANA Food and Beverages Advertising and Marketing Communications Code

AANA Wagering Advertising and Marketing Communication Code

ABAC Responsible Alcohol Marketing Code

Australian Food and Grocery Council Quick Service Restaurant Initiative

The Federal Chamber of Automotive Industries' Voluntary Code of Practice for Motor Vehicle Advertising

The Therapeutic Goods Advertising Code

The Weight Management Industry Code of Practice

Code of Ethics

The ubiquity of OOH advertising in the public domain and the desire for a sustainable self-regulated industry led to the development of the OMA Code of Ethics, which guides members on how to operate responsibly and meet prevailing community standards

The Code of Ethics is a set of principles that define the industry's standards for doing business with advertisers and regulators, and sets out its responsibilities towards the community and the environment. The Code of Ethics supplements the obligations that members are already required to comply with under existing federal and state laws.

“The OMA's Health and Wellbeing Policy reflects the fact that the Out of Home industry has listened to the community and government and pro-actively introduced a new voluntary self-regulating code to address what has become a critical issue in Australian society.”

Charmaine Moldrich, CEO, OMA and MOVE.



Pictured (left to right): Charles Parry-Okeden, Chairman, OMA and MOVE; John O'Neill, CEO, QMS Media; Andrew Tyquin, Managing Director, Outdoor Systems; Kirsty Dollison, Managing Director, TorchMedia; Steve O'Connor, CEO, JCDecaux; Charmaine Moldrich, CEO, OMA and MOVE; and Brendon Cook, CEO, oOh!media.

Copy and concept advice

The OMA Code of Ethics states that OMA members cannot endorse the display of advertisements likely to breach the AANA Code of Ethics.

The OMA's Copy and Concept Advisory Service helps eliminate the likelihood of an OOH advertisement breaching one or more of the 18 self-regulatory codes and policies OMA members adhere to.

The service is complemented by training for OMA members. In 2020, the following training programs were delivered:

- Gambling advertising
- AANA Code of Ethics
- National Health and Wellbeing Policy

An important aspect of self-regulation is keeping the policies up to date and educating members on any changes. The OMA takes responsibility for this and has established a program of education and pre-vetting initiatives including:

- a national program of content training for members and media agencies

- a copy advice service based on OMA policies
- a concept advice service for advertisers and creative agencies to use at the early stage of campaign development.

In 2020, the OMA reviewed 239 advertisements submitted to the OMA Copy and Concept Advice Service. Of these, 65 were rejected and 22 were modified to comply with the codes.

Breaches

Ad Standards upheld three complaints about advertisements posted by OMA members. Two of the three advertisements were found in breach of Section 2.6 Health and Safety of the AANA Code of Ethics and one advertisement was found to breach the AANA Environmental Claims in Advertising and Marketing Code.

The advertisements found in breach of the codes were immediately taken down.

Out of Home advertising complaints 2011-2020

Year	Number of complaints upheld [^]	Percentage of complaints to Ad Standards	AANA Guidelines contravened
2020	3	3.2%	Health and safety, environmental claims
2019	1	10.2%	Violence
2018	0	7%	None
2017	4	8.3%	Sexual appeal, health and safety, discrimination
2016	1	9.1%	Sex, sexuality and nudity
2015	2	9.3%	Discrimination, health and safety
2014	1	10.4%	Violence
2013	1	16.8%	Sex, sexuality and nudity
2012	3	9.6%	Violence, work health and safety
2011	8	39.1%	Sex, sexuality and nudity

[^]Complaints made against OMA members only.

Source: Ad Standards (adstandards.com.au)

Analysis of complaints by media (%) 2020

Media	2020	Media	2020
Billboard	1.48%	Print	0.80%
Cinema	0.11%	Promotional material	0.34%
Email	0.63%	Radio	2.90%
Internet	2.36%	Transport	1.02%
Internet - social media	7.09%	TV - free-to-air	66.62%
Mail	0.26%	TV - on demand	5.41%
Other	2.54%	TV - out of home	0.40%
Outdoor	0.71%	TV - pay	5.09%
Poster	2.25%	Total	100%

Source: Ad Standards (adstandards.com.au)

National Health and Wellbeing Policy

The OMA National Health and Wellbeing Policy came into effect in July 2020. It expands on the OMA Placement Policy that restricts the advertising of discretionary food and drink products within a 150m boundary of a primary or secondary school. The policy aims to meet community expectations and support government efforts nationwide to tackle overweight and obesity, while being commercially viable for the industry. As part of this commitment, OMA members will donate up to \$3M in OOH media space each year to promote healthy diet and lifestyle choices.

The policy is a world-first, and was developed following extensive consultation with industry, food groups, advertisers, health promotion experts and government. The OMA will report on its compliance to state and federal governments each year.

School Mapping Tool

In 2018, the OMA introduced a School Mapping Tool to strengthen the industry's compliance with its self-regulatory guidelines. The tool helps OMA members comply with the OMA's Placement Policy, which prohibits the advertising of products such as alcohol, adult services, as well as discretionary food, within 150m of the boundary of a primary and secondary school.

Almost 31,000 schools are now mapped across NSW, QLD, SA, VIC and WA.

Driver behaviour research

The OMA's second National Road Authority Roundtable in February 2020 brought together stakeholders from state road authorities, researchers and OMA members.

The ambition of the group is to agree to a research project supported by both industry and state governments that examines the impact of digital signs on driver behaviour.

This joint research project is an Australian first and its findings are intended to help inform the development of consistent national regulations and guidelines for digital roadside advertising.

Better regulation

The OMA aims to build a sustainable industry for its members while advocating for regulation that is fair, equitable, proportionate and based on evidence.

The industry's robust system of self-regulation guides the content displayed on OOH signs. However, the design, location and operation of signs is dictated by state and local government regulations.

The OMA is an important partner in the development and application of these regulations. Having forged strong

relationships with state road and planning authorities, the OMA ensures that regulations for roadside signs ensure driver safety.

In addition, the OMA works with state and local governments to ensure that guidelines allow digital signage the flexibility to offer more utility and contribute to urban renewal.

Regulatory change roadmap

The pandemic lockdowns that restricted audience movement severely impacted the Outdoor industry as advertisers who use OOH cut back their marketing budgets.

As the Outdoor industry gives back 50 per cent of its revenue to government and landlords in rent and taxes, the industry's loss of 39.4 per cent of revenue in 2020 was significant. The knock on effect of this loss of revenue was felt beyond the Outdoor industry.

While much of the regulation that governs OOH advertising is state based, the OMA sought federal input and action to help shape a nationally consistent operating framework to help with the industry's recovery.

The Roadmap outlined several key issues relating to excessive red-tape and over-regulation. While these were hurdles pre-pandemic, they also posed major roadblocks to industry recovery. They included unwarranted restriction on advertising content and ideological barriers to the adoption of digital innovation.

The Roadmap also provided evidence-based solutions to these roadblocks, aiming to create a fair and appropriate regulatory environment for safe, well-designed OOH to operate in.

Submissions

The OMA prepared submissions for the following:

- AANA Food and Beverages Advertising Code Review
- Draft Liverpool Local Environmental Plan 2008 (Amendment 69)
- Draft Parramatta Local Environmental Plan
- Parramatta CBD Planning Proposal
- Queensland Department of Transport and Main Roads' Roadside Advertising Consultation Group: Dwell Times and Tranche 3 Items

Environment and sustainability

Under the OMA Code of Ethics, members are expected to engage in environmentally responsible and sustainable practices. The policy is in place to minimise the impact of the industry's operations on the environment, and to contribute to the sustainability of the communities in which they operate.



Industry benchmarks

In 2020, Out of Home (OOH) revenue decreased due to the pandemic. The industry ended the year posting \$566.5M in revenue, down 39.4 per cent.

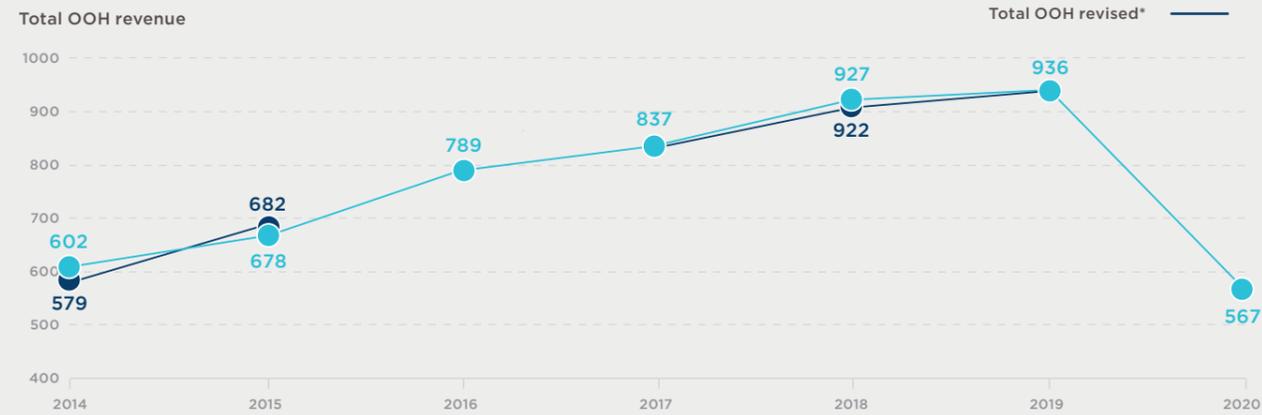
Revenue results

Members of the Outdoor Media Association (OMA) generate close to 80 per cent of OOH advertising revenue in Australia. The OMA reports on the industry's financial performance by publishing quarterly and yearly revenue results.

The pandemic's economic and social effects had a major impact on the industry's bottom-line performance. Net media revenue decreased 39.4 per cent in 2020, to \$566.5M, down from \$935.5M in 2019.

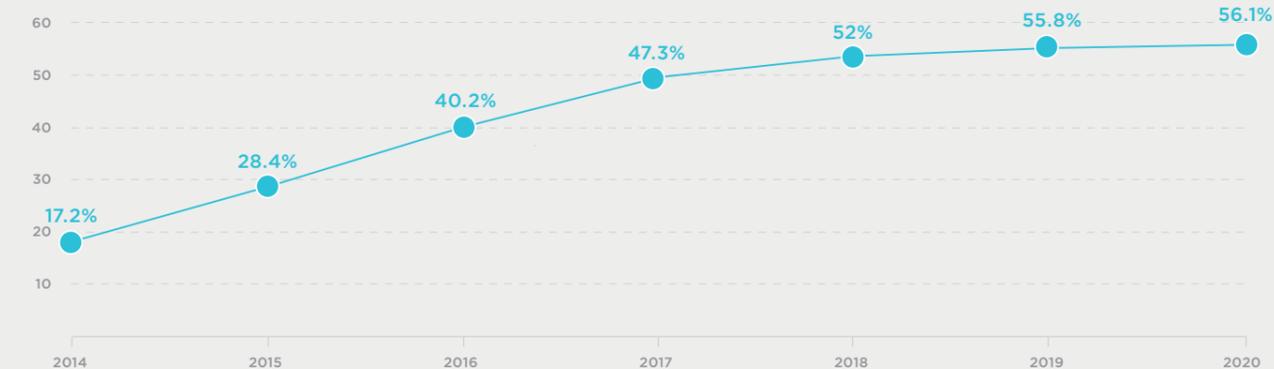
Digital signs represent 56.1 per cent of total revenue in 2020, up from 55.8 per cent in 2019.

Revenue results (\$M) 2014 - 2020



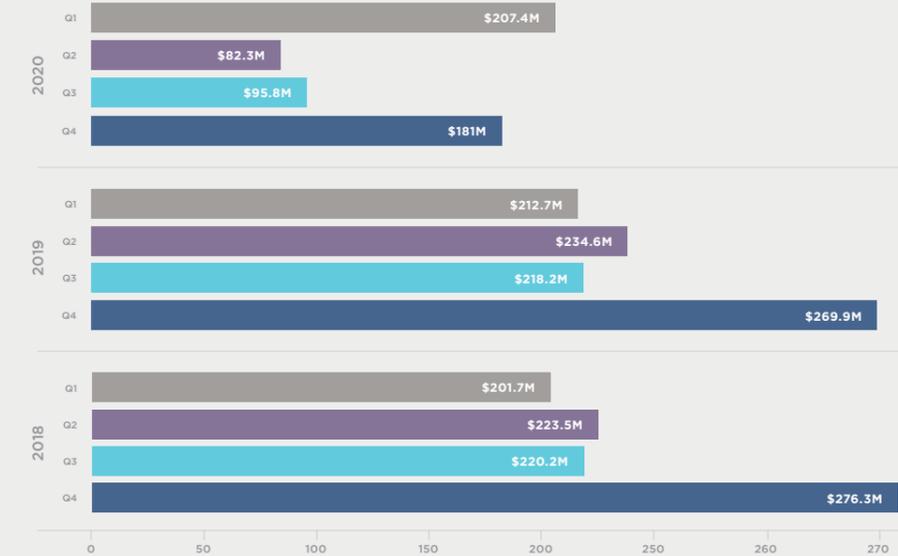
* Previously released revenue figures have been adjusted to reflect changes in the OMA membership.

DOOH as a percentage of total OOH revenue



Performance by quarter 2020

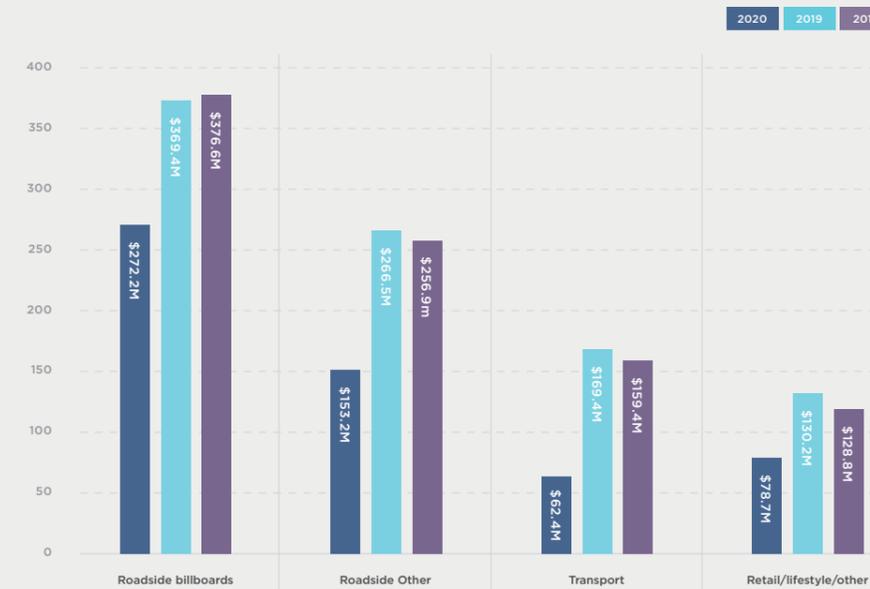
OOH revenue by quarter (\$M) 2018 - 2020



- First quarter net media revenue decreased by 2.5 per cent to \$207.4M, down from \$212.7M in 2019.
- Second quarter net media revenue decreased by 65 per cent to \$82.3M, down from \$234.6M in 2019.
- Third quarter net media revenue decreased by 56 per cent to \$95.8M, down from \$218.2M in 2019.
- Fourth quarter net media revenue decreased by 32.9 per cent to \$181M, down from \$269.9M in 2019.

Performance across formats and locations 2020

OOH revenue across formats and locations (\$M) 2018 - 2020



Category breakdown

- Roadside billboards (over and under 25 square metres) \$272.2M
- Roadside other (bus/tram externals, small format, street furniture) \$153.2M
- Transport (including airports) \$62.4M
- ^Retail/Lifestyle/Other \$78.7M

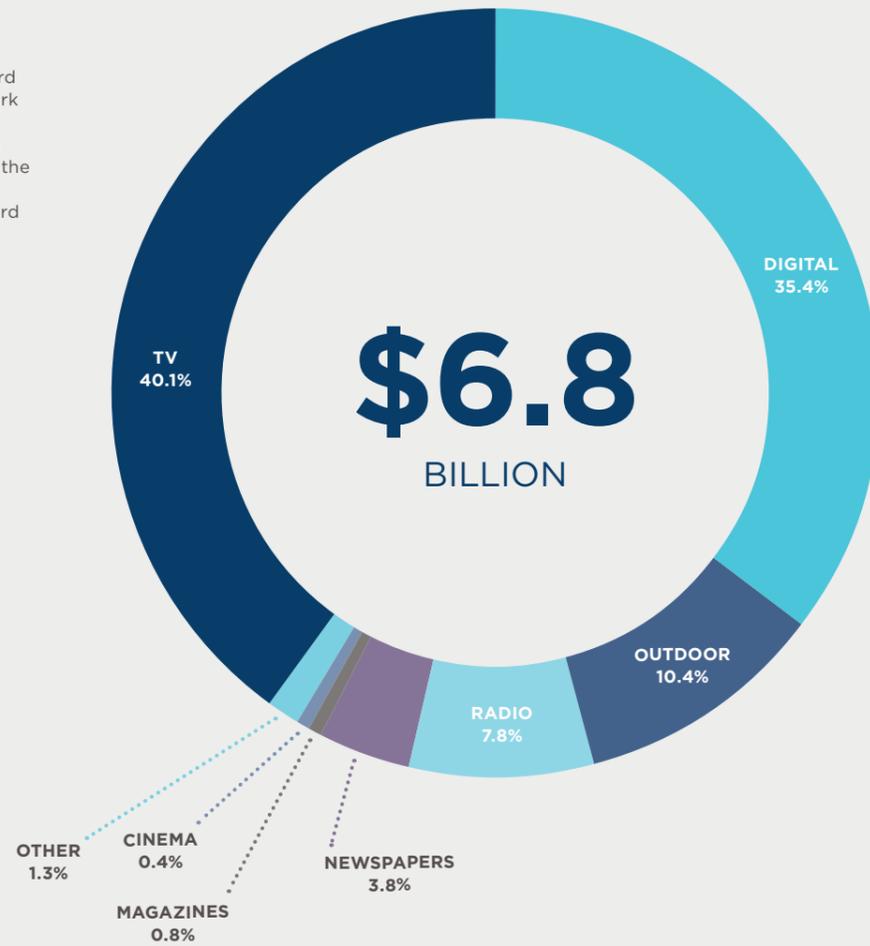
Note: rounding has been used for numbers in this report.

^This category reports shopping centre panels, as well as all place-based digital inventory including office media - covering inventory in lifts and office buildings, café panels, as well as digital screens.

Percentage share by media channel of agency advertising spend*

Change from CEASA to SMI

Since 2019, the OMA has used Standard Media Index (SMI) figures to benchmark Australian advertising industry share instead of figures supplied by CEASA. This change has come about because the CEASA Report is no longer published due to the death of its compiler Bernard Holt.



	2015	2016	2017	2018	2019	2020
Television	45.9%	43.8%	42.9%	41.4%	38.9%	40.1%
Digital	22.8%	25.2%	27.4%	28.4%	30.9%	35.4%
Outdoor	10.9%	11.7%	12.5%	13.8%	14.3%	10.4%
Radio	7.8%	8.3%	8.4%	8.7%	8.5%	7.8%
Newspapers	8.1%	7.2%	5.5%	4.9%	4.2%	3.8%
Magazines	2.9%	2.4%	1.9%	1.5%	1.2%	0.8%
Cinema	1.1%	1.1%	1.1%	1.0%	1.1%	0.4%
Other	0.5%	0.3%	0.3%	0.4%	0.9%	1.3%

Source: Standard Media Index (SMI).

*SMI figures reflect the spend by media agencies on behalf of clients, it does not include the advertising spend by advertisers who book directly with the media operator/channel. While these figures do not reflect the total dollars spent on advertising in Australia, they provide an indication of where media agencies are spending their advertising dollars. This subsequently provides an indication of each media channel's market share.

Please note, SMI now reports advertising booked by the media agencies represented by IPG Mediabrands therefore previously reported figures may differ.

Top 10 OOH sectors

2020	2019*	Top 10 sectors	All media			OOH	
			2020 (\$M)	2019 (\$M)	YOY%	2020 (\$M)	% Share
1	1	Retail	1,801.1	1,790.9	1%	119.7	7%
2	2	Finance	475	528.6	-10%	70.7	15%
3	5	Communications	599	512.8	17%	70.1	12%
4	3	Motor Vehicles	508	744.9	-32%	53.1	10%
5	12	Government	267.2	224.7	19%	48.8	18%
6	9	Beverages-Alcoholic	100.5	102.9	-2%	42.8	43%
7	8	Food	277.6	238	17%	40.6	15%
8	4	Entertainment & Leisure	253.2	516.4	-51%	40.4	16%
9	7	Travel/Accommodation	370.1	855.5	-57%	29.7	8%
10	6	Media	330.3	397.1	-17%	29.4	9%

Top 10 OOH advertisers

2020	2019*	Top 10 advertisers	All media			OOH	
			2020 (\$M)	2019 (\$M)	YOY%	2020 (\$M)	% Share
1	1	Stan Entertainment	37.5	33.5	12%	21.2	57%
2	2	Commonwealth Bank	54.7	48	14%	14.9	27%
3	9	Amazon.com	55.8	47.6	17%	12.8	23%
4	3	McDonald's Family Restaurants	69.5	82.9	-16%	11.2	16%
5	6	Woolworths Supermarkets	86.3	86.5	0%	10.6	12%
6	17	Diageo	18.6	14.5	28%	9.6	52%
7	15	Lion	21.5	22.7	-5%	8.3	39%
8	28	National Australia Bank	25.8	28.4	-9%	8.2	32%
9	12	Telstra Corporation	53.5	53.4	0%	7.8	15%
10	5	Uber	23.2	34.4	-33%	7.6	33%

Source: Nielsen Ad Intel 2020. Nielsen reserves the right to adjust ranking retrospectively.

*Please note there was an error in the previously reported 2019 rankings. Corrected tables are available at oma.org.au/industry-performance.

Verification

Over the past 10 years, the Outdoor industry has invested in its network of digital signs, tools and technologies that have transformed OOH advertising into a modern, dynamic media channel.

This digital transformation has fuelled close to a decade of consistent growth which has seen industry revenue go from \$400M in 2010 to nearly \$1 billion by the end of 2019. The rise in digital signs has brought opportunities for campaigns to be more flexible, immediate and relevant, by delivering dynamic content based on a variety of variables including time of day, temperature, and events.

As both Digital Out of Home (DOOH) and classic OOH campaigns are bought, sold, and executed in more complex and varied ways, it is important that the industry sets a high benchmark for campaign delivery. This helps buyers audit what they bought against what was delivered.

What is verification

In simple terms, verification measures the delivery and performance of a campaign to confirm whether each campaign message has been displayed as expected.

Independent verification tracks the delivery of every advertisement, every play, on every digital screen, for the duration of the campaign. This verified data can be compared with the client's booking agreement and reported on in real-time as the campaign rolls-out.

To be effective, verification must be performed by an independent third-party and it must use a transparent methodology which validates the completeness and accuracy of the reported data. By using factual data, clients, agencies and media owners can identify any delivery issues and resolve them while the campaign is live.

How is this done

Determining the best methodology for independent verification is a task the advertising industry at-large is investigating and investing in. As many of the methodologies used in digital verification have had their genesis in an online environment, their translation to a physical environment like DOOH screens calls for different considerations.

Methodologies that are commonly used to verify ad delivery within the online digital ecosystem, where an internet connection is required to display advertisements, are less suitable when applied to DOOH where a constant internet connection for every screen is not a reality, nor is required to display an advertisement. Digital screens and content management systems are specifically designed to play content even when an internet connection is lost.

Therefore, it is important to deploy verification systems that are built to deal with both the digital play and the physical environment this is played from, to ensure the accurate reporting of campaign delivery.

What is behind this

At the moment, there are three main types of OOH verification being offered in the Australian market:

- physical inspections of sites
- creative tagging which pings an alert when an advertisement is played
- player logs that are generated from independent media player systems.

One method for the granular reporting of raw system data is to integrate with the software that delivers media to DOOH display. Player logs are a machine-generated record of what happened within a network, and these logs are independent from the media owner personnel who have no access to the backend of the media log system.

These logs can provide an immutable fingerprint of activity, and when accessed securely, tell the story as to what actions were performed, such as the time and duration the advertisement played at, what type of advertisement it was, and the location it was broadcast.

By integrating with cloud-based media delivery systems, this data can be made available in raw form to independent verification providers. Where appropriate assurance controls exist, the system data can be incorporated as part of the overall picture of compliance of the delivered campaign.

While all three verification options have their benefits and limitations, a key consideration of the industry is that each option meets agreed standards in terms of accuracy, scalability and security.

Setting standards

OMA members are working to finalise a set of standardised metrics for both DOOH and classic OOH that simplify the buying and selling of inventory, and that preserve the opportunities for buyers afforded by digitisation.

A robust set of industry-level standards will help ensure a transparent, level playing field for all relevant supply chain participants. Arguably, standards play an even bigger role in verification given its objective is to increase transparency, accountability and trust.

While there are multiple global assurance standards, SOC 2 is considered the highest accreditation for the handling of third-party, non-financial data. This is due to the stringent requirements that must be met to comply with the standard's data security, availability, integrity, and privacy frameworks. Currently the player logs are the only certified SOC 2 compliant verification option available to both suppliers and advertisers.

The Outdoor industry is at the beginning of its standards journey for verification. The OMA and its members are working closely with agencies, clients and verification service suppliers to ensure that the standards set have been independently evaluated and are deliverable, and will use the lessons learned from other industries to help shape the path forward for the sector.

CASE STUDY

Verification for Out of Home (OOH)

Seedooh is one of the businesses which OMA members, agencies, and clients use to independently verify the delivery performance of their advertising campaigns.

Seedooh's Independent Verification Platform is proven at scale, consuming and verifying approximately 2 billion playout events each month, from more than 50,000 unique display locations. It is also aligned with global best practice SOC 2 data assurance standards.

Seedooh records and verifies playout data directly from third-party media players such as Broadsign, as well as from electronic work order systems used in classic posting workflow, standardising the output for all participants.

The result is that agencies and advertisers can consume verified proof of delivery data through the platform, enabling data-rich insights and analytics to be drawn on campaign performance.

The benchmarks of campaigns for 2019–2020

In 2019, Seedooh independently verified 9,866 DOOH campaign bookings made with OMA members, and in 2020 verified 7,808. Each year, every millisecond of nearly 8 billion play events were processed by Seedooh's best-practice assurance controls framework.

On average, campaigns over-delivered by 42 per cent in 2019, and by 17 per cent in 2020. With fewer campaign bookings in 2020 due to COVID-19, the average expected plays per campaign was up by 56 per cent. This was especially pronounced in quarter two, where the average expected play count per campaign was double the pre-pandemic benchmark.

Number of verified OOH campaigns*



Number of verified OOH plays*



Source: Seedooh (seedooh.com).

*Benchmarks based on verified play and campaign counts of the following OMA members: BIG Outdoor, JCDecaux, oOh!media, QMS Media.



10 Teamwork

The Outdoor Media Association (OMA) and MOVE (Measurement of Outdoor Visibility and Exposure) committees provide support and make recommendations on complex and specialised industry issues.

OMA membership

OMA members run businesses that are dynamic, innovative and responsible. Their network of Out of Home (OOH) signs connect people with brands and are part of the iconography of cities.

An application for membership requires approval from the OMA's Board of Directors.

OMA membership is divided into three categories:

Media Display members are OOH media companies that advertise third-party products* across all categories in the OOH sector, including airports, billboards and free-standing advertisement panels, buses, bus stations, cafés, light rail, office buildings and lifts, pedestrian bridges, railway stations, shopping centres, on street furniture (bus/tram/light rail shelters), trams, and universities.

Non-Media Display members are businesses that provide goods and services to the OOH industry.

Asset Owners own the property where OOH advertising stands.

*Advertising in which the advertisement is not associated with the premises eg, a land or property owner allows an OOH media company to display an advertisement for a third-party product.

National recognition

Media i Awards

The annual Media i Awards recognise both team and individual sales excellence across all media channels. They acknowledge the important role that media sales people play in the delivery of outstanding results. Media i are the only awards dedicated to recognising the contribution of media owners and their sales staff.

In 2020, OMA members claimed four Media i Awards. Congratulations to the following winners:

Outdoor/cinema category - sales person of the year

SA - Lucy Carey, JCDecaux

WA - Damien Bodestyne, JCDecaux

VIC - Warwick Kiel, oOh!media

QLD - Aidan Price, QMS Media

International recognition

The Drum Out of Home Awards

The Drum Out of Home Awards recognise the most effective and innovative OOH advertising campaigns from around the globe.

In 2020, OMA member JCDecaux received three nominations.

Most Effective Use of Live Updates - nomination

JCDecaux, *Amazon Live Pricing*

Out of Home for Good - nomination

Broadsheet in partnership with JCDecaux, *Restaurant Live Lists*

Use of Data - nomination

JCDecaux, *Hello*



OMA and MOVE committees

Finance committee

The Finance committee provides strategic advice on all OMA and MOVE financial matters. The committee met four times in 2020.

- Sheila Lines, oOh!media
- Charmaine Moldrich, OMA (Chair)
- Kate Solomon, QMS Media
- David Watkins, JCDecaux

Sales and marketing committee

The Sales and Marketing committee helps develop strategies for the marketing and communications program delivered by the OMA. The committee met four times in 2020.

- Kirsty Dollisson, TorchMedia (Chair)
- Phil Eastwood, BIG Outdoor
- Nick Errey, QMS Media
- Matt Fisher, TorchMedia
- Sheree Groves, JCDecaux
- Julie Jensen, OMA
- Sara Lappage, QMS Media
- Emily Lewis, TorchMedia
- Bruce Mundell, oOh!media
- Oliver Newton, JCDecaux
- Annabelle Nielsen, oOh!media
- Marie Norman, JCDecaux
- Alexandra Simpson, OMA
- Josh Steel, goa
- Essie Wake, JCDecaux
- Emma Ward, OMA
- Elly Whitehouse, Bishopp Outdoor Advertising
- Claire Woods, oOh!media
- Christian Zavec, QMS Media

Regulatory affairs committee

The Regulatory Affairs committee oversees all regulatory matters affecting the industry. The committee met three times in 2020.

- Kelly Ainley, oOh!media
- Luke Brett, oOh!media
- Michael Cali, oOh!media
- Emma Carr, OMA (Chair)
- Kirsty Dollisson, TorchMedia
- Odette Ferreira, oOh!media
- Dima Frolov, BIG Outdoor
- Graham Johanson, oOh!media
- David Lovatt, oOh!media
- Melissa Maggs, goa
- Alice Magon, oOh!media
- Siobhan Marren, oOh!media
- Tess Phillips, JCDecaux
- Damien Rath, JCDecaux
- Blair Robertson, Daktronics
- Kirsten Samuels, OMA
- Alexandra Simpson, OMA
- Adam Trevena, QMS Media
- Andrew Tyquin, Outdoor Systems
- Brian Tyquin, Outdoor Systems
- Danielle Tyquin, Outdoor Systems

Regulatory affairs committee—Queensland

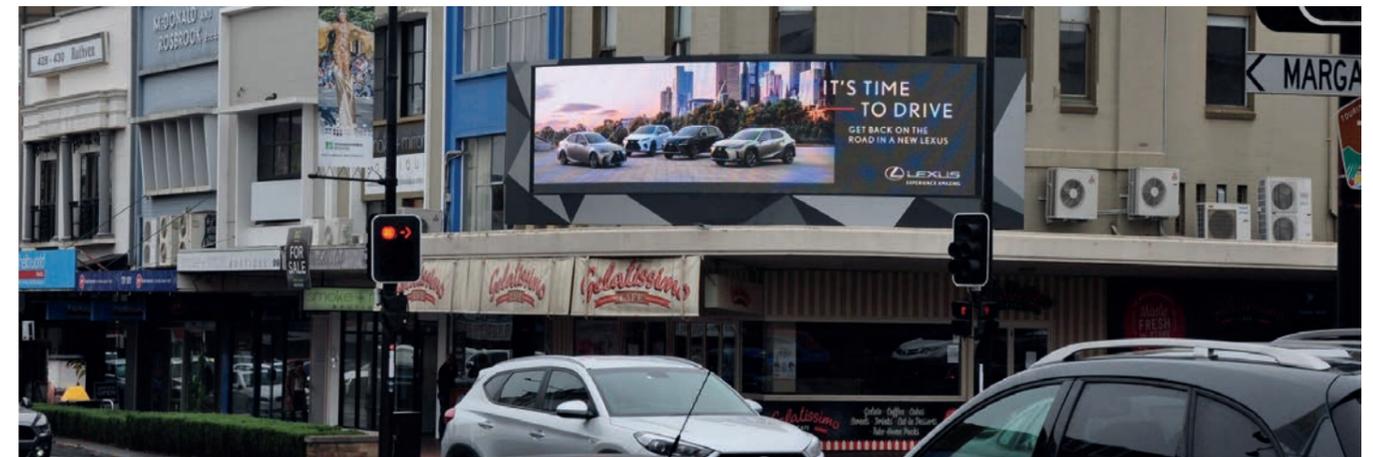
The Regulatory Affairs committee oversees all regulatory matters affecting the industry in QLD. The committee met twice in 2020.

- Kelly Ainley, oOh!media
- Peter Bailey, Bailey Print Group
- Anthony Baxter, Paradise Outdoor Advertising
- Brad Bishopp, Bishopp Outdoor Advertising
- Michael Cali, oOh!media
- Emma Carr, OMA (Chair)
- Karen Cockerell, Paradise Outdoor Advertising
- Kirsty Dollisson, TorchMedia
- Odette Ferreira, oOh!media
- Dima Frolov, BIG Outdoor
- Mitch James, Paradise Outdoor Advertising
- Graham Johanson, oOh!media
- Brad Lindsay, JCDecaux
- David Lovatt, oOh!media
- Melissa Maggs, goa
- Siobhan Marren, oOh!media
- Nick McAlpine, Bishopp Outdoor Advertising
- Tess Phillips, JCDecaux
- Damian Potter, JCDecaux
- Peter Reynolds, oOh!media
- Kirsten Samuels, OMA
- Peter Savage, Savage Outdoor Advertising
- Alexandra Simpson, OMA
- Rod Taylor, Tayco Outdoor
- Adam Trevena, QMS Media

MOVE technical committee

The MOVE technical committee (TECHCOM) is comprised of technical representatives from each of the major businesses measured by MOVE and is supported by MOVE staff. TECHCOM oversees all of MOVE's technical development and modelling. This includes data and software updates and the modelling and technical developments used to derive OOH measurement results. The committee met 10 times in 2020.

- Jorge Barbosa, MOVE
- Edwina Colquhoun, oOh!media
- Tara Coverdale, oOh!media
- Kylie Green, MOVE (Chair)
- Grant Guesdon, MOVE 2.0
- Emily Lewis, TorchMedia
- Daniella Natoli, oOh!media
- James Nettlefold, QMS Media
- Ganjina Nozakova, MOVE
- Adele Rose, JCDecaux
- Jordana Sherlock, QMS Media
- Cristina Smart, JCDecaux
- Era Zancanaro, TorchMedia



OMA members

The Outdoor Media Association (OMA) represents close to 80 per cent of Out of Home (OOH) advertising industry.

Media display



Bailey Print Group is a large format production house delivering print on demand for internal and external signs and display solutions, including event signs, banners, point of sale, fleet graphics, mesh and wallpapers. Complete in-house design, production, distribution and installation services are backed by over three decades of industry experience.

baileyprintgroup.com.au



Bishopp Outdoor Advertising commenced operation in 1993 and 25 years on has evolved into one of Australia's leading regional Out of Home advertising companies. The business has over 2,500 assets across QLD, NSW and New Zealand, including 19 airports. Now employing more than 50 staff, holding relationships with over 400 property owners, and helping to promote over 1,000 businesses every year; Bishopp is truly a success story.

bishopp.com.au



JCDecaux is the leading Out of Home media company worldwide, with more than one million advertising panels in more than 80 countries and more than 13,000 employees. Incorporated in 1964 in France, JCDecaux was listed on the Paris Stock Exchange in 2001. JCDecaux has been providing high quality, architecturally designed street furniture in Australia since 1997. Its Australian and New Zealand businesses includes 40,000 assets spanning airports, rail, transit, static and digital billboards.

jcdecaux.com.au



oOh!media is a leading Out of Home media company enhancing public spaces through the creation of engaging environments that help advertisers, landlords, leaseholders, community organisations, local councils and governments reach large and diverse public audiences.

The company's extensive network of more than 37,000 digital and static asset locations includes roadsides, retail centres, airports, train stations, bus stops, office towers, cafes, bars and universities.

The company invests heavily in technology and is pioneering the use of sophisticated data techniques that enable clients to maximise their media spend through unrivalled and accurate audience targeting.

oohmedia.com.au



Outdoor Systems is an independent billboard media company that began in 1986. Its core focus is on high quality digital and traditional static large format billboards in the Sydney market. Outdoor Systems offers sales, management and development solutions for new and existing billboard sites and consulting services to commercial and local government stakeholders.

outdoorsystems.com.au



QMS are experts in premium, high impact digital Outdoor, with a strategic focus in providing clients and agencies with dynamic and innovative advertising solutions, underpinned by the latest developments in technology and data. Connecting audiences through multiple touchpoints and customised data, QMS provides multi-platform engagement across its portfolio of premium landmark digital and traditional billboards, exclusive street furniture and airport opportunities across Australia.

qmsmedia.com



TorchMedia is a specialist transit Out of Home provider with an extensive portfolio of commuter assets spanning light rail, heavy rail and ferries. TorchMedia's range of high-impact and targeted transit formats offer flexible campaigns that deliver results by starting conversations with over two million people on their daily commute.

torchmedia.com.au



Savage Outdoor Advertising is a small family-owned operation with over 30 years' experience in Out of Home media. Savage Outdoor provides large format displays in key Brisbane areas.



As a young and nimble digital billboard specialist, **BIG Outdoor's** focus is simplifying and increasing the effectiveness of the world's most enduring advertising format, to drive stronger returns for our customers and partners. We are unapologetically proud of this position. We have a purpose-built, high quality, large format digital Out of Home network, that's completely focused on creating 'high impact' and being 'big at what matters'.

bigoutdoor.com.au



Family-owned and operated in QLD since 1983, **goa's** billboards offer extensive coverage of the Brisbane market, reaching 85 per cent of southeast QLD each week. goa's mission is to ensure all of its experience, effort and investment is focused on getting clients noticed.

goa.com.au



Motio is a leading place based and location intelligence media company focused on creating memorable brand and customer experiences all over Australia.

motio.com.au



From the humblest of local beginnings - a one-man billboard operation - to becoming one of the largest and fastest growing regional advertising organisations in Australia, **Paradise Outdoor Advertising** is still a family business. Today, it manages over 1,100 billboards across QLD and the NT, from Darwin, Port Douglas and down to the Fraser Coast, Mount Isa, across to the Western Downs and all points in-between.

paradiseoutdoor.com.au



Established in 2004, **Tayco Outdoor Advertising** combines best practice with on-the-ground expertise and a comprehensive knowledge of the advertising industry. Taking a consultative approach, Tayco provides a variety of QLD clients with tailored solutions that are fresh and innovative. Tayco builds partnerships with its clients and the community to deploy sustainable, high-quality and environmentally friendly products.

taycooutdoor.com.au

Non-media display



Broadsign is making it easier than ever for media owners, agencies and brands to harness the power of Out of Home and connect with audiences across the globe. Powering over 425,000 signs in airports, shopping centres, health clinics, transit systems and more, Broadsign is at the heart of people's lives. The Broadsign platform helps media owners more efficiently manage their business operations while enabling brands and agencies to easily book Out of Home campaigns.

The platform includes tools for content distribution, playback and proof of performance; sales inventory availability and proposal generation; automated programmatic Digital Out of Home transactions; and Out of Home business operations.

broadsign.com



Daktronics was founded in 1968 and is the world's industry leader in designing and manufacturing electronic scoreboards, programmable display systems, and large screen video displays. The Daktronics team is passionate about providing the highest quality standard to display products as well as custom-designed and integrated systems.

daktronics.com



Hanlon Industries was established in 2000 and continues to be an independent, family-owned and operated enterprise. As leaders in the design, engineering and construction of Out of Home signage, Hanlon's professional team tailors services and customises delivery to suit the specific needs of each client.

hanlonindustries.com.au



Prime Signs is a premier QLD sign company that excels in services including installation, maintenance, fabrication, digital signage and street furniture, as well as airport and service station specialty projects. Prime Signs remains family owned and run after 20 years in the industry. It is a progressive entity that understands the dynamic and demanding pace of the industry, insisting upon attention to detail, integrity and forward thinking.

primesigns.com.au



Seedooh is a fully independent technology platform specifically designed and built to provide complete and standardised reporting for buyers and sellers in the Out of Home industry. Launched in July 2017, Seedooh is the only reporting system that provides near time, third party verified delivery data for Out of Home campaigns appearing on both digital and traditional formats.

seedooh.com



We're **BSV**, your true partner in big screen technology. We bring spaces to life through digital installations. From billboards to scoreboards, our big screens make landmarks, organisations, and venues across Australia more attractive to the crowds you want to engage. If you're looking for signage, a full AV upgrade, curved billboard or a video screen above the water, chances are BSV have tackled it all before.

bigscreenvideo.com.au



GSP are specialists in the production of large format Outdoor printing for billboards, street furniture, transit and vehicle graphics, mesh and fence banners. Maintaining great relationships with media companies, manufacturers and suppliers, GSP ensures the latest technology and sustainability techniques are employed to guarantee on time delivery and excellent customer experience. With over 50 years in the industry, GSP will delivery your requirements on time and within budget.

gspprint.com.au



MMT Print is one of Australia's leading large format digital print businesses. As pioneers of the industry, MMT has expanded its printing and fabrication capabilities to cater for production of billboards, street furniture, backlit displays, hoardings, fleet graphics, point of sale and signage applications with speed and precision. MMT's unique processes and premium quality have been the hallmarks of its operations since its inception in 1991.

mmtprint.com.au



Rojo Pacific
LARGE FORMAT PRINTING MATERIALS

Rojo Pacific brings you the world's best wide-format media for Out of Home, point of sale, signs and displays. Australian-owned and with an extensive national network, it combines global reach with local expertise to deliver the right solution, whenever and wherever you need it.

rojopacific.com.au



Vistar Media offers a complete end-to-end programmatic ecosystem to power today's Out of Home industry, enhancing the buying, selling and management of digital signage media with data-driven, automated and measurable Digital Out of Home transactions.

vistarmedia.com



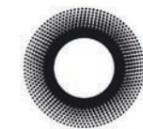
Established in 1976, **Country Outdoor Signs** is a specialist sign production, installation and maintenance company. From the smallest shop sign to the largest Out of Home advertising project, Country Outdoor Signs maintains a professional, progressive and innovative approach to client requirements.

cosigns.com.au



Key Systems has been successfully supplying asset management software to Out of Home media owners since 2005. Its Fusion software manages traditional and digital Out of Home inventory, maximising the returns generated and streamlining the Out of Home advertising life cycle. It is an international company that understands local industry requirements in all the countries in which it operates.

keysystemsww.com



OMNIGRAPHICS

Omnigraphics is Australia's premium grand format digital printer with offices in Melbourne, Sydney, Brisbane, Adelaide and Perth and two full scale factories across the eastern seaboard of the country. Omnigraphics specializes in printing billboards, street furniture, transit panels, banners, hoardings, lightboxes, retail signage, point of purchase and much more. Omnigraphics continues to invest in new technology and processes, making it the partner of choice for Australia's leading brands.

omnigraphics.com.au

Asset owners



Sydney Airport is Australia's gateway airport, serving more than 43.3M passengers a year and connecting Sydney to a network of over 100 international, domestic and regional destinations. The location benefits both business and tourism and is a major strength underpinning Sydney's future prosperity.

sydneyairport.com.au



Telstra is Australia's leading telecommunications and information services company, offering a full range of communications services and competing in all telecommunications markets.

telstra.com.au



Transport for NSW leads the development of a safe, efficient, integrated transport system that keeps people and goods moving, connects communities and shapes the future of NSW cities, centres and regions encompassing all modes of transport including road, rail, metro, ferry, light rail, point to point, regional air, cycling and walking.

transportnsw.info

12

Beneficiaries

A selection of the arts, sports, government and charitable organisations supported by the Out of Home (OOH) industry in 2020.

AEIOU Foundation	Gotcha4Life	Raise Foundation	West Australian Ballet Company
Amy Gillett Foundation		Rare Cancers Australia	White Lion
Art Gallery of New South Wales	Heartkids Australia	Re:act	Wildlife Victoria
Arts Centre Melbourne	Hepatitis NSW	Reconciliation Australia	WIRES
Arts Project Australia	Humpty Dumpty Foundation	Robert Connor Dawes Foundation	World Vision Australia
Australian Ballet		Ronald McDonald House Charities	World Wellness Group
Australian Children's Music Foundation	Inclusive Australia	Royal Children's Hospital Melbourne	World Wildlife Fund Australia
Australian Energy Foundation	Jean Hailes Foundation for Women's Health	Royal Prince Alfred Hospital	Youngcare
Australian Himalayan Foundation	Koala Kids Foundation	RSL Australia	Zero2Hero
Australian Speak Easy Association	Leukaemia Foundation Lifeline	RSPCA Australia	GOVERNMENT
		RSPCA Queensland	Australian Capital Territory Department of Health
Batyr	Make-A-Wish Foundation	SANE Australia	Australian Federal Police
Benetas Aged Care	Meningitis Centre Australia	Scitech	Australian Government
Beyond Blue	Mental Awareness Foundation	Shake It Up Foundation	
Blue Ribbon Foundation	Missing Persons Advocacy Network	Smoggys	Banyule City Council
Bowel Cancer Australia	Moreland Zebras Football Club	Sony Foundation Australia	Brisbane City Council
Breast Cancer Trials	Movember Foundation	Southern Freemasons	
Brisbane Portrait Prize	Moving Feast	St Vincent de Paul Society	Canterbury City Council
	Multiple Sclerosis Australia	Starlight Children's Foundation Australia	City of Karratha
Cancer Council Western Australia	Murdoch Children's Research Institute	Station Art Gallery	City of Melbourne
CanTeen	Museum of Contemporary Art	Stay Kind	City of Monash
Cerebral Palsy League	National Breast Cancer Foundation	Surf Life Saving Australia	City of Port Phillip
Challenge Foundation	National Gallery Australia	Sydney Breast Cancer Foundation	City of Stonnington
Children's Hospital Foundation	National Gallery of Victoria	Sydney Children's Hospital Foundation	City of Sydney
Children's Hospital Westmead	New South Wales Rural Fire Service	Sydney Opera House	Department of Planning Transport and Infrastructure South Australia
CityCycle	Night Time Industries Association	Sydney Symphony Orchestra	Department of Transport Victoria
Clean Up Australia	One Girl Australia	Taronga Conservation Society Australia	
Code Read Dyslexia Network	Orange Aware	The Australian Mint	Inner West Council
Conservation Volunteers Australia	Orange Sky Australia	The Big Issue	Institute for Urban Indigenous Health Queensland
Cure Cancer Australia Foundation	Ovarian Cancer Australia	The Butterfly Foundation	New South Wales Health
		The Catherine Hamlin Fistula Foundation	Public Transport Authority Western Australia
Dandelion Support Network	Pink Hope	The Lady Musgrave Trust	
Daniel Morcombe Foundation	Planet Ark	The New South Wales Korean War Memorial	Queensland Government
Dolly's Dream	Polished Man	The Prince Charles Hospital Foundation	Randwick City Council
DrinkWise	Puka Up	The Salvation Army	South Australia Police
		Thomas Kelly Youth Foundation	
Earth Hour	Queensland Community Foundation	Uniting Care	Victorian Government
Elder Abuse Action Australia	Queensland Performing Arts Trust	Variety South Australia	Western Australian Mental Health Commission
Empty Esky	R U OK? Day	Very Special Kids	Willoughby City Council
Farmers Across Borders			
Fight MND			
Foodbank Victoria			
Foodbank Queensland			
Gippsland Emergency Relief Fund			
Gold Coast Hospital Foundation			
Good360 Australia			

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