

20  
24

# ANNUAL REPORT

OUTDOOR  
MEDIA  
ASSOCIATION

**The OMA office is located on the land  
of the Gadigal people of the Eora Nation.**

We thank them for their stewardship of  
this land and for sharing their traditions,  
stories, knowledge and intrinsic  
connection to land and water with us.  
We acknowledge and respect elders  
past, present and future and look forward  
to future opportunities for growth and  
understanding within our community  
and industry.

**OUTSHINE  
OUTSTANDING  
OUTDOOR**



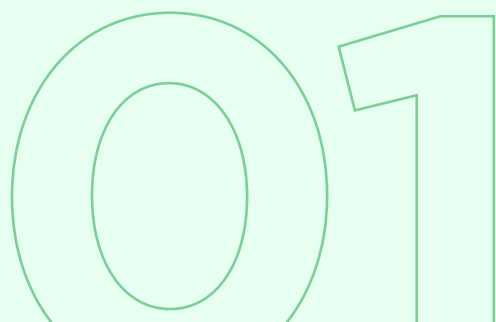




# INTRODUCTION

The Outdoor Media Association (OMA) is the peak industry body representing the Out of Home (OOH) advertising industry in Australia. OMA's mission is to drive the growth and development of the OOH sector by providing leadership in audience measurement, government relations, policy, advocacy, and training.

Looking ahead, the OMA is preparing for the 2025 launch of MOVE (Measurement of Outdoor Visibility and Exposure), which will enhance data richness, and with the support of our members will standardise measurement and drive continued growth and effectiveness in Out of Home advertising.



# CEO'S MESSAGE



The Out of Home industry continues to prove itself as a resilient and powerful medium that is unskippable. We are proud to remain at the forefront, engaging, informing, and inspiring the public in ways that no other channel can.

Beyond advertising, Out of Home is a vital pillar of the Australian economy and local communities. By commissioning Deloitte Access Economics, we measured our industry's contribution and found that in 2023, Out of Home added nearly \$1.3 billion to the national economy and supported over 6,100 full-time jobs\*.

Our members also have a direct, positive impact on everyday life, maintaining over 21,500 public infrastructure assets, including bus shelters, bins, and tram stops, valued at \$665 million\*, all at no cost to taxpayers.

As I have said before and will continue to say, our industry is united like never before. As we enter a new era of measurement precision with MOVE, I am confident that agencies and advertisers will see the incredible potential of our channel and formats. The introduction of a new measurement platform providing year-round, hourly data, across seasonal shifts, 5 metropolitan and 21 regional areas, and all Out of Home formats, will further strengthen our offering as a medium and drive future growth.

The Outdoor Media Association and its members are committed to delivering lasting value and a positive impact on Australia's economy and communities.

**Elizabeth McIntyre**  
CEO, OMA & MOVE



**The Out of Home industry continues to prove itself as a resilient and powerful medium that is unskippable.**



\*Source: Deloitte Access Economics analysis (2024)





# 2024 FULL YEAR RESULTS



# \$1.3B

NET  
MEDIA  
REVENUE

## 75%+

Digital Out of Home (DOOH)  
accounts for 75.2% of total  
new media revenue

## 8%+

8.07% increase in  
net media revenue  
recorded by the industry

Editor's note on how figures are calculated: The Outdoor Media Association (OMA) estimates that it represents close to 100% of the Out of Home (OOH) industry in Australia. Figures provided are net figures (exclusive of commission, production, and installation). Figures represent advertiser campaigns posted in each quarter. Figures also include all direct sales which are estimated at 10% of total bookings.

# CELEBRATE

## OMA CONFERENCE & AWARDS 2024

Congratulations to  
all of our winners



### EMERGING LEADER

Adrian Venditti, *QMS Media*

### OMA INDUSTRY AWARD

Graeme Wooster, *QMS Media*

### EXCELLENCE IN INNOVATION

Brad Palmer, *JCDecaux*

### OUTSTANDING SERVICE

#### NSW

Nick Errey, *QMS Media*

#### QLD

Melissa Maggs, *goa Billboards*

#### SA

Maddy Shopov, *oOh!media*

#### VIC

Andrew Hines, *JCDecaux*

#### WA

Megan Camp, *Val Morgan Outdoor*

### RISING STAR

#### NSW

Jade Sargeant, *JCDecaux*

#### QLD

Harriet Marshall, *Scentre Group Brandspace*

#### SA

Rachel Girdler, *oOh!media*

#### VIC

Tayla Harrison, *Val Morgan Outdoor*

#### WA

Caitlin Montgomery, *oOh!media*

### EXCELLENCE IN DESIGN AND CONSTRUCTION

City of Sydney Project Delivery Team,  
*QMS Media*

### EXCELLENCE IN FIELD WORK AND WORK HEALTH AND SAFETY

Corinna Murtagh, *JCDecaux*

### 2024 HALL OF FAME INDUCTEE

Brendon Cook, *OAM*





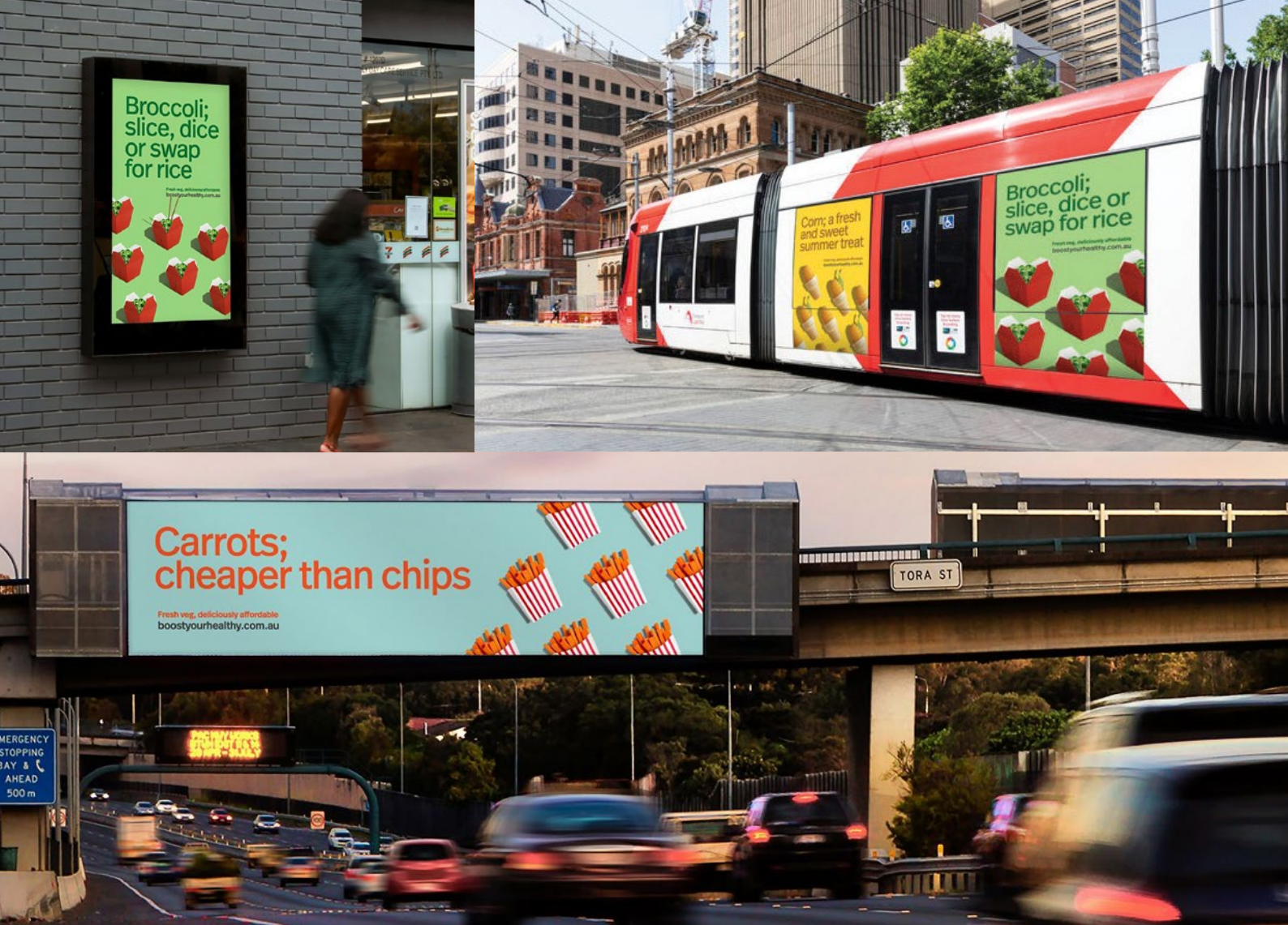
Elizabeth McIntyre  
CEO, OMA & MOVE



Charles Parry-Okeden  
Independent Chair  
OMA & MOVE







# CONTRIBUTE

Since 2021 The Out of Home industry has donated more than **\$31 million** in advertising value towards the education of Healthy Eating. In 2024, the 'Fresh veg, deliciously affordable' campaign continued to focus on encouraging Australians to make healthy choices.

**One in three** people remembered the campaign and out of those who remembered:

- **91%** of parents were encouraged to include vegetables in meals, lunchboxes or snacks for their child/children
- **82%** were encouraged to lead a healthy lifestyle
- **79%** were encouraged to consider vegetables as an alternative to occasional food
- **77%** were encouraged to purchase vegetables

## Campaign

### Fresh veg, deliciously affordable



**>11.6M**

people reached



**\$12.3M**

advertising value donated



**18,250**

advertising signs displayed



**>133.2M**

impressions





Campaign  
DrinkWise | It's Okay to Say Nay



Campaign  
ANZAC Day



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# EDUCATE

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GOVERNMENT  
RELATIONS  
TRAININGS

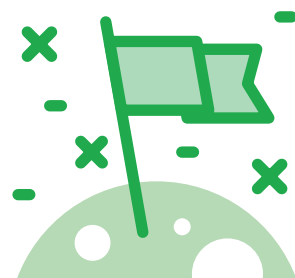
633

ATTENDEES



790+

COPY  
ADVICE



ZERO BREACHES  
BY OMA MEMBERS



15

CEO  
OUTLOOKS

615

ATTENDEES





**570**

MEMBERS AND AGENCIES  
RECEIVED TRAINING ON  
MOVE AND OASIS

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**500,000+**

SITE CLASSIFICATION INPUTS  
AND ADJUSTMENTS

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**23,000**

INTERNAL LOCATIONS AND  
ROADSIDE LINK REVIEWS

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**6,000+**

QUERIES RESOLVED

# RESEARCH

006



**\$1.3B**  
contributed to the  
Australian economy

For every dollar of value added by OOH advertising companies, there is more than another dollar of value added across the broader economy.



**6,100+**  
FTE positions supported  
nationally in 2023

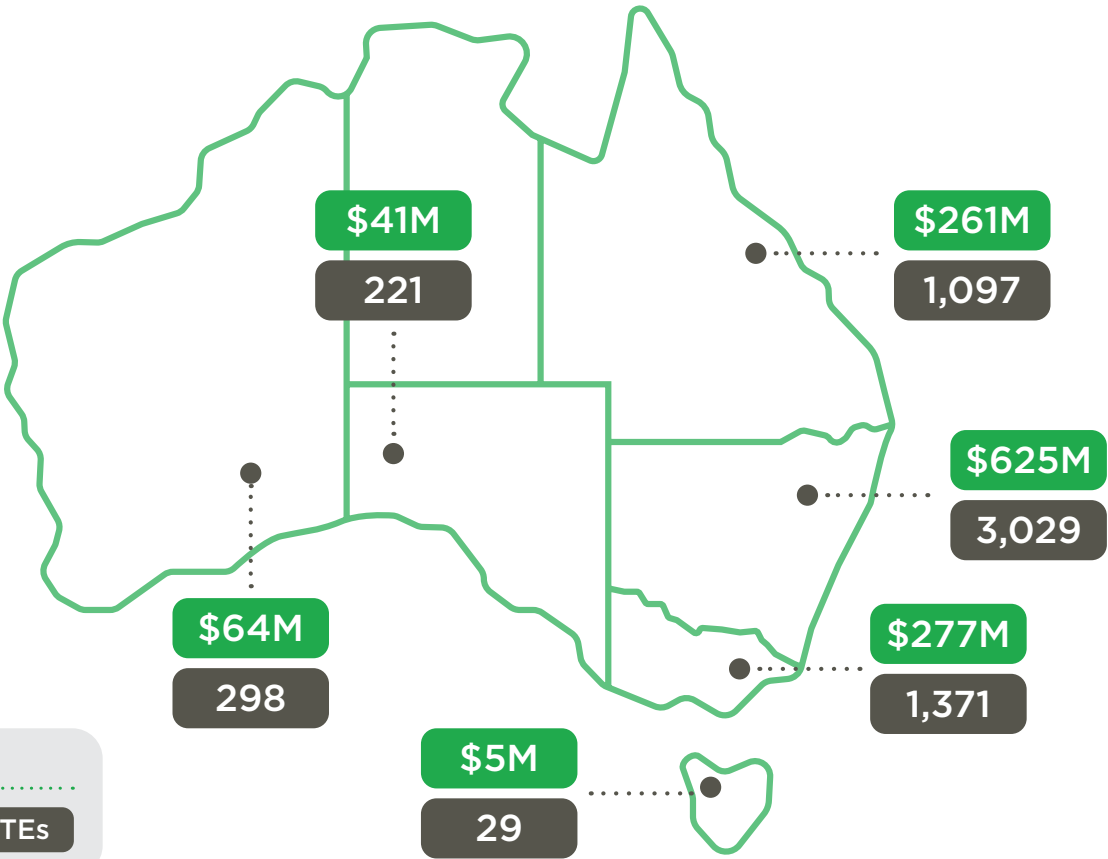
For every FTE employed directly, there are two other FTEs employed elsewhere in the economy.

## CONTRIBUTION BY STATES

Source: Deloitte Access Economics analysis (2024)

ACT & NT:

**\$17M**  
73



Metrics

**\$M**   **FTEs**



OOH advertising provides essential public infrastructure, developed, maintained and managed by OMA members at no cost to tax payers.



**21,500**

public infrastructure items



**\$665M**

value of public infrastructure

Public infrastructure includes bus and tram shelters, bins, pedestrian bridges, public toilets, and kiosks.



**300**

charities supported in 2023 by OMA members

**\$97.8M**

in charitable support in 2023



# OMA **AWARDS<sup>20</sup><sub>24</sub>**

Creativity drives the most impactful and engaging Outdoor advertising, offering endless opportunities for innovation, connection, and brand fame.

In February 2025, the OMA will inaugurate the Creative Awards, celebrating Outdoor and Out of Home creative excellence by showcasing the most inspired campaigns of 2024.



**BEST  
CLASSIC  
CAMPAIGN**

**BEST  
DIGITAL OR  
PROGRAMMATIC  
CAMPAIGN**

**BEST INNOVATION  
OR SUSTAINABILITY  
CAMPAIGN**

**BEST  
SMALL FORMAT  
CAMPAIGN**

**BEST  
MULTI-FORMAT  
CAMPAIGN**

**BEST  
SPECIAL BUILD  
CAMPAIGN**

# 07 REVENUE

## GL SMI AU CY2024 AD SPEND TRENDS BY MEDIA

Competitive Media Type	Media Type	CY2024 vs CY2023
<b>Digital (standalone)</b>		<b>5.1%</b>
Video	Television	-9.9%
	Digital	15.7%
<b>Video Total</b>		<b>-7.6%</b>
<b>Outdoor Total</b>		<b>5.1%</b>
Audio	Radio	-3.4%
	Digital	16.8%
<b>Audio Total</b>		<b>-1.0%</b>
News Publishing	Newspapers	-12.0%
	Digital	-6.8%
<b>News Publishing Total</b>		<b>-10.1%</b>
Magazines	Magazines	-10.7%
	Digital	11.9%
<b>Magazines Total</b>		<b>-5.0%</b>
<b>Cinema Total</b>		<b>11.2%</b>
<b>Grand Total</b>		<b>-0.5%</b>

Source: Standard Media Index

# 8%+

increase in net media revenue  
recorded by the industry

#### 2024 TOP 10 ALL MEDIA CATEGORY

Category	2024 Rank	2023 Rank	Out of Home (\$'000's)	All Media (\$'000's)
Retail	1	1	\$209.9	\$4103.8
Financial Services	2	2	\$172.6	\$2529.4
Business and Industrial	3	4	\$120.1	\$1686.7
Telecom & Utilities	4	3	\$117.2	\$2664.7
Government & Non-profit	5	5	\$113.9	\$1577.4
Leisure & Entertainment	6	6	\$111.7	\$1199.1
Travel & Transport	7	7	\$87	\$1222.3
Media & Publishing	8	10	\$75.1	\$650.7
Automotive	9	8	\$71.8	\$1277.2
Alcoholic drinks	10	9	\$58	\$143.9

#### 2024 TOP 10 GLOBAL ALL MEDIA CATEGORY

Category	2024 Rank	2023 Rank	Out of Home (\$'000's)	All Media (\$'000's)
Retail	1	1	\$8,255.8	\$158,974.1
Business & Industrial	2	2	\$5,875.5	\$104,375.9
Media & Publishing	3	3	\$4,011.3	\$63,157.3
Leisure & Entertainment	4	4	\$3,859.3	\$47,865.1
Telecoms & Utilities	5	6	\$3,602.7	\$72,525.3
Travel & Transport	6	5	\$3,398.4	\$31,619.3
Government & Non-Profit	7	8	\$3,377.7	\$32,991.6
Financial Services	8	7	\$3,075	\$63,181.4
Food	9	10	\$2,623	\$64,373
Automotive	10	12	\$2,366	\$55,201.2

Source: WARC Media Jan 2024 - Dec 2024

# MEMBERS

The Outdoor Media Association is the leading industry body for the Out of Home sector in Australia. The OMA continues to experience significant membership growth, with the addition of 9 new members in 2024.

OMA members collaborate to advance the industry by conducting research, providing valuable insights, implementing innovative technologies and creativity, and promoting sustainable growth. Members support one another individually and collectively, strengthening the industry as a whole.

## OMA membership is divided into 3 categories:

### Media Owners

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Outdoor media companies that advertise third-party products across all categories in the OOH sector, including advertisement panels, buses, bus stations, cafes, light rail, office buildings and lifts, pedestrian bridges, railway stations, shopping centres, on-street furniture (bus/tram/light rail shelters), trains and universities.

### Suppliers

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Businesses that provide goods and services to the OOH industry.

### Asset Owners

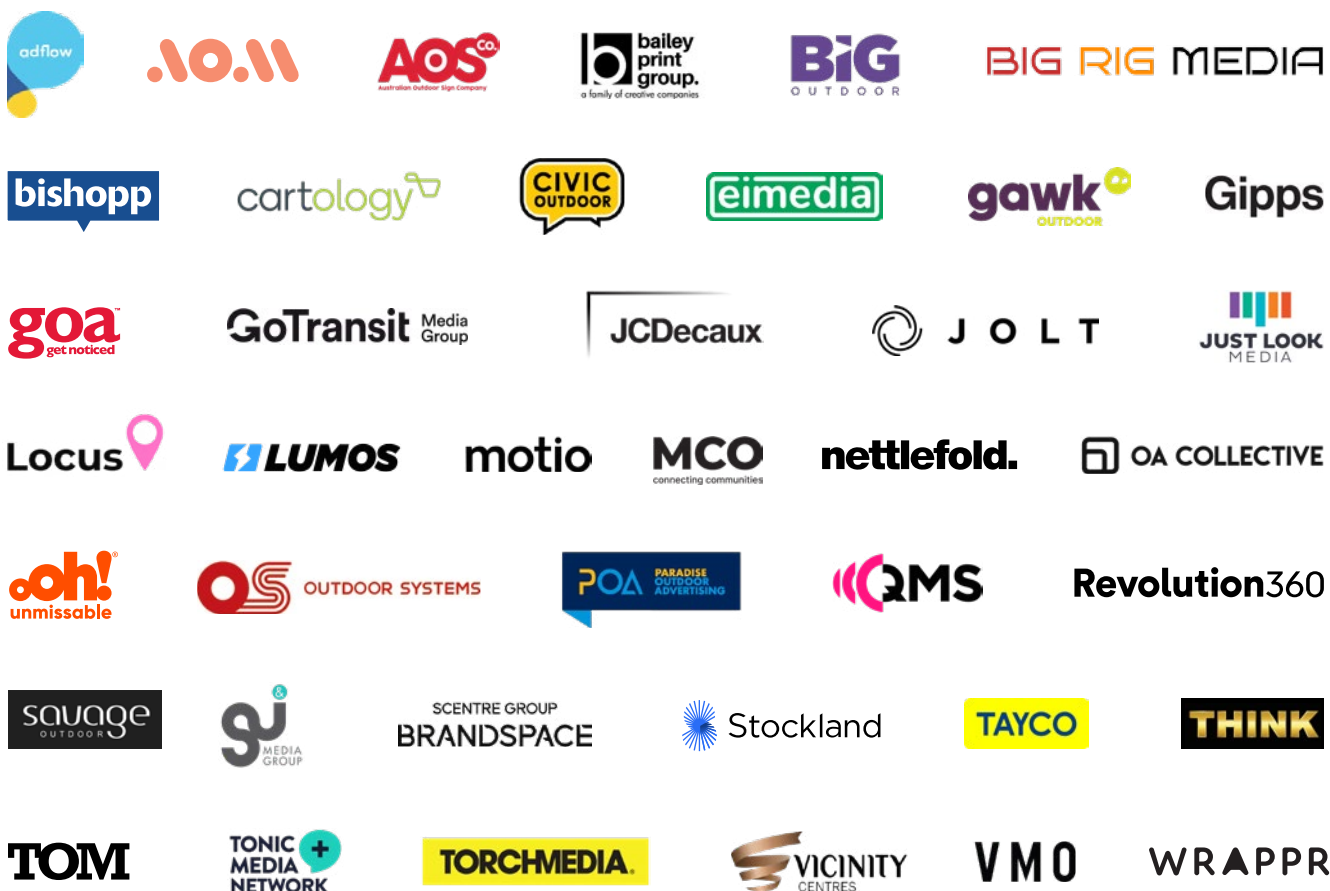
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Own the property where OOH advertising assets stands.

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## Media Owners



## Suppliers



## Asset Owners









**8<sup>out</sup>  
of** **10**

**people leave  
home each day\***

\*P14+

**MOVE 2 MOVE**

**2025**



**Outdoor Media Association**

Suite 504, 80 William Street  
East Sydney NSW 2011

[info@oma.org.au](mailto:info@oma.org.au)  
(+61)2 9357 9900

[oma.org.au](http://oma.org.au)