

20
23

ANNUAL REPORT

OUTDOOR
MEDIA
ASSOCIATION

The OMA office is located on the land of 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.

INTRODUCTION

The Outdoor Media Association (OMA) is the peak industry body representing Out of Home (OOH) advertising companies in Australia. As the voice of the industry, we work to build a more sustainable future for our members by developing relationships with stakeholders and showcasing the creative potential and commercial value of the OOH 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.

WHAT IS MOVE?

MOVE (Measurement of Outdoor Visibility and Exposure) is a measurement system that measures the trips people take each day and the signs they encounter along the way to give a picture of who is likely to see an advertisement. Agencies and advertisers use this information to understand who is paying attention to signs and where, making the process of planning, buying and reporting on campaigns easier.

Endorsed by the Media Federation of Australia (MFA) and the Australian Association of National Advertisers (AANA), MOVE is Australia's premier quantitative audience measurement currency for OOH media.

WHAT MOVE MEASURES

MOVE measures all OOH advertisements across a range of locations including:

- Airports
- Bus and Railway platforms and concourses
- Office buildings, cafes, gyms, shopping centres and universities
- Petrol stations and convenience stores
- Public transport, including externals of buses, ferries, light rail and internals (except for trains)



FULL YEAR RESULTS

2023

73%+

Digital Out of Home (DOOH) accounts for **73.9 per cent** of total net media revenue

12%

Industry total increases: **12.23 per cent** on net media revenue in 2023

OVER 433M

impressions donated to charitable causes

OVER \$97M

media value donated to charitable causes

\$1,193M

NET MEDIA REVENUE

Editor's note on how figures are calculated:

The Outdoor Media Association (OMA) estimates that it represents close to 100 per cent of the Out of Home (OOH) industry in Australia. Figures provided in this media release 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 per cent of total bookings. Figures may be rounded.

CEO'S MESSAGE

Over the course of 2023, our industry has shown remarkable agility in responding to evolving consumer behaviours, technological advancements, and regulatory changes. These dynamics have shaped our strategies and underscore the importance of innovation and collaboration in driving sustainable growth of 12.23%*.

One of the key trends shaping our industry is the increasing integration of technology. Digital Out of Home advertising continues to gain momentum, offering advertisers greater flexibility, targeting capabilities, and creative versatility. This shift is not merely about adopting new technologies but leveraging them to deliver more personalised and impactful campaigns that resonate with Australians.

A combination of OOH formats including classic, retail, transit and lifestyle is proven to deliver greater awareness for advertisers. The highest percentages from the 'Day in the Life' Survey** were for driving awareness. OOH was strongest when compared with all TV, social media, websites, radio and online video across all demographics.

Sustainability continues as a priority. We recognise our responsibility to minimise our environmental footprint while maximising the effectiveness

of advertising solutions. Initiatives such as energy-efficient digital displays, eco-friendly materials, and community-focused campaigns are integral to our commitment to sustainable practices as an industry.

In support of communities across 2023, the industry contributed over \$97M in donated advertising value to 300+ charities.

Global economic uncertainties, regulatory developments, and shifts in consumer preferences continue as challenges. As an industry, we remain responsive to changing perspectives. By proactively addressing industry challenges, we can continue to drive growth and deliver value to our members.

As we look ahead, there are exciting opportunities on the horizon. The arrival of MOVE2, signifies a progressive shift in audience measurement. For us in the Out of Home sector, where data meets reality, MOVE2 heralds a new era of granularity.

The industry is aligned now more than ever in its commitment to deliver trusted, valuable, and industry-wide metrics to improve, expand and better inform the planning and buying of OOH. Our ability to harness data analytics and artificial intelligence will be instrumental in

optimising campaign performance and driving ROI for our partners. We look forward to completing the final analysis of all data points and delivering a best-in-class audience measurement system.

I am confident that with your continued support and collaboration, we will chart a course toward a vibrant and prosperous future for the Outdoor Media Industry in Australia.



Elizabeth McIntyre
CEO, OMA & MOVE

*Industry total increase on net media revenue in 2023.
**Dynata & Thrive Insights for MOVE; Day in the Life November 2022; N= 2,962. Per cent that agree OOH makes you aware of brands by demo, and prompts trial.

INNOVATE

A DAY IN THE LIFE

82%

of people are
Out of Home
each day

#1

ranking
across all
demographics
for brand
awareness

70%

of the metro
population can
be reached in
one week by
brands for \$500K

OOH: Reaches **ALL DEMOGRAPHICS**,
DRIVES AWARENESS, PROMPTS CONSIDERATION
and is a **COST EFFECTIVE** broadcast channel

MOVE

04



MOVING FORWARD

- Completely **new system**
- **new models**
- **new metrics**
- **proof points**

Increased audience movement **granularity** and more **demographics**



Increased granularity (hourly for 365 days)



Seasonal, monthly and holiday variation in audiences

The **Neuro Impact Factor** is applied across all campaigns



All OOH formats including place-based

Nationwide including regional



Local and visitor travel (airport)



CREATIVITY

130 ENTRIES

In 2023, entries arrived from around Australia for the Creative Collection, highlighting creativity in diverse forms across all Out of Home formats. Uber Eats delivered victory in the Grand Prix with their campaign, "Get Almost Anything".



CONTRIBUTE

HEALTHY EATING CAMPAIGN

The 2023 Healthy Eating campaign 'Buy in Season For Healthy Returns', focussed on encouraging Australians to make healthy choices with the consideration of cost-of-living pressures.

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

- 84% were encouraged to lead a healthy lifestyle

- 82% were made conscious to eat more vegetables
- 81% were encouraged to purchase vegetables
- 70% visited the Boost Your Healthy website
- 41% talked to someone about the campaign

**Independent post-campaign survey commissioned by the OMA through Dynata*

HEALTHY EATING CAMPAIGN

Reached
>12M people

Delivered
267M impressions

Donated
\$8.33M

ANZAC DAY CAMPAIGN

Reached
>10M people

Delivered
153M impressions

Donated
\$9.79M

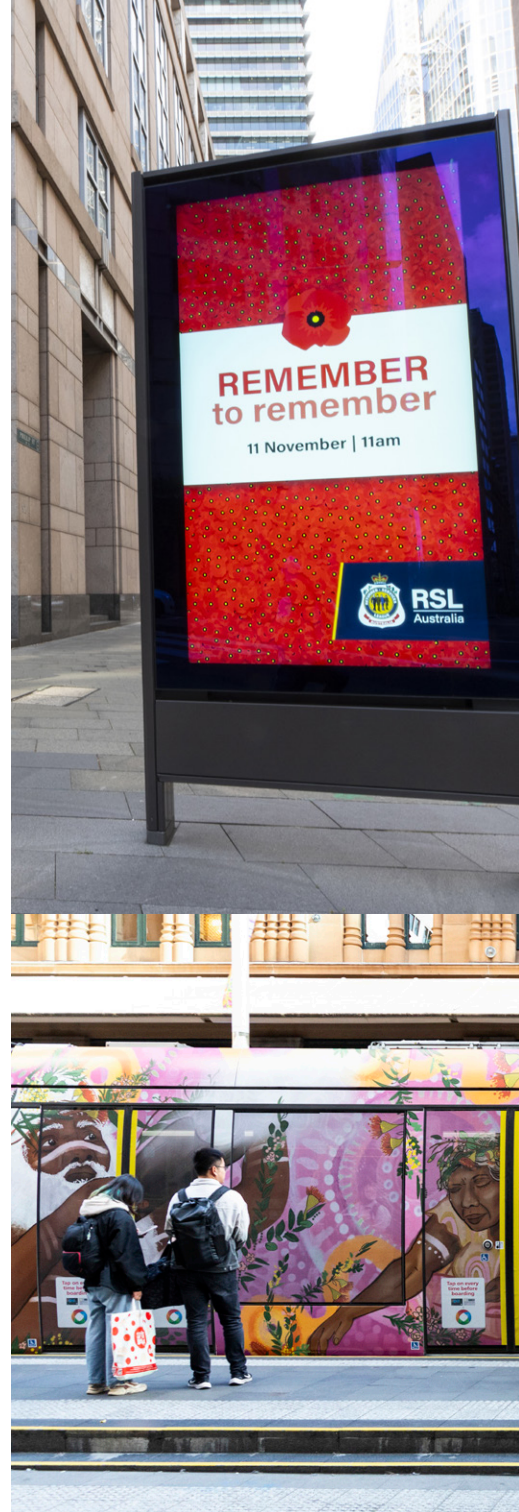
REMEMBRANCE DAY CAMPAIGN

Reached
>4M people

Delivered
13M impressions

Donated
\$1.93M

06





CELEBRATE

OMA CONFERENCE & AWARDS

Congratulations to all our winners

BSV EMERGING LEADER

John Cochrane, *Val Morgan Outdoor*

EXCELLENCE IN INNOVATION

Cristina Smart, *JCDecaux*

OUTSTANDING SERVICE NSW

Tara Coverdale, *oOh!media*

OUTSTANDING SERVICE QLD

Peter Reynolds, *oOh!media*

OUTSTANDING SERVICE SA

Nathan Robertson, *oOh!media*

OUTSTANDING SERVICE VIC

Sara Lappage, *QMS*

OUTSTANDING SERVICE WA

Jessie MacKinnon, *oOh!media*

RISING STAR NSW

Claire Allison, *QMS*

Jacqueline Ingram, *oOh!media*

RISING STAR QLD

Courtney Johnson, *QMS*

RISING STAR SA

Natasha Jarrett, *oOh!media*

RISING STAR VIC

Luke Course, *Gawk Outdoor*

RISING STAR WA

Alycia Digglo, *JCDecaux*

Ben Walker Rising Star Award

Luke Course, *Gawk Outdoor*

2023 HALL OF FAME INDUCTEES

Pierce Cody

Ian Woods





Charles Parry-Okeden
Independent Chair, OMA & MOVE



Elizabeth McIntyre
CEO, OMA & MOVE



MEMBER EDUCATION

7 GOVERNMENT
RELATIONS
TRAINING
SESSIONS

559
ATTENDEES

18 **MOVE**
Measurement of Outdoor Visibility and Exposure
TRAINING
SESSIONS

533
ATTENDEES

08

REVENUE



GUIDELINE SMI AU CY2023 AD SPEND TRENDS

(Underlying Trends Excludes Govt, Pol Party Ad Spend Boost from 2022 Fed Election)

Competitive Media Type	Media Type	CY2023 Top Line Trend	CY2023 Underlying Trend
Digital (standalone)		2.0%	2.2%
Video	Television	-13.9%	-11.8%
	Digital	30.6%	32.4%
Video Total		-11.2%	-9.1%
Outdoor Total		15.1%	18.5%
Audio	Radio	-5.9%	-1.0%
	Digital	10.5%	12.4%
Audio Total		-4.2%	0.5%
News Publishing	Newspapers	-17.3%	-14.4%
	Digital	-8.8%	-7.4%
News Publishing Total		-14.4%	-11.8%
Magazines	Magazines	-0.1%	0.1%
	Digital	-4.2%	-5.3%
Magazines Total		-1.2%	-1.3%
Cinema Total		0.2%	5.8%
Other Total		-25.5%	-27.7%
Grand Total		-2.7%	-0.9%

Source: Standard Media Index

2023 TOP 10 OOH ADVERTISER

Advertiser	2023 Rank	2022 Rank	Out of Home (\$000's)	All Media (\$000's)
Commonwealth Bank	1	2	\$13,027	\$36,355
Lion	2	8	\$12,923	\$26,509
Stan Entertainment	3	1	\$12,152	\$64,527
McDonald's Restaurants	4	4	\$11,154	\$113,212
Qantas	5	6	\$11,131	\$43,758
Coles Supermarkets	6	14	\$10,303	\$62,816
Amazon.com	7	5	\$9,792	\$93,763
Woolworths Supermarkets	8	19	\$9,708	\$124,910
Uber	9	20	\$9,567	\$42,147
Optus	10	7	\$9,501	\$54,183

2023 TOP 10 ALL MEDIA CATEGORY

Category	2023 Rank	2022 Rank	Out of Home (\$000's)	All Media (\$000's)
Retail	1	1	\$170,646	\$2,498,959
Finance	2	3	\$81,339	\$574,930
Communications	3	2	\$79,319	\$806,633
Entertainment & Leisure	4	4	\$75,525	\$573,905
Travel/Accommodation	5	5	\$60,200	\$589,776
Motor Vehicles	6	7	\$58,301	\$642,991
Beverages - Alcoholic	7	9	\$45,884	\$107,210
Food	8	10	\$41,125	\$394,310
Insurance	9	11	\$37,991	\$440,465
Government	10	6	\$35,944	\$232,146

Source: Nielsen Ad Intel 2024. Nielsen reserves the right to adjust spend estimates and associated ranking retrospectively. Spend estimates are for Jan-Dec 2023.

MEMBERS

The OMA is the united voice of the Outdoor Media industry. We lead conversations on measurement, research, policy, regulation, innovation and communication. We do this for three reasons: to unify our members, to support sustainable industry growth and to help shape the future of the industry and the community.

OMA MEMBERSHIP

The OMA experienced significant membership growth this year, with 9 new members. The OMA now represents nearly 100 per cent of the Australian Outdoor Media industry.

OMA members work together to enhance the industry by conducting research and offering valuable insights, implementing technologies and innovation, and fostering sustainable growth. They support each other both individually and collectively to strengthen the industry as a whole.

OMA membership is divided into three categories:

1. MEDIA OWNERS

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.

2. SUPPLIERS

Businesses that provide goods and services to the OOH industry.

3. ASSET OWNERS

Own the property where OOH advertising stands.

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

100

MEDIA OWNERS



BIG RIG MEDIA



motio

nettlefold.



Revolution360



SCENTRE GROUP
BRANDSPACE



TOMI



VMO

WRAPPR

SUPPLIERS



helio



seedco



ASSET OWNERS



Membership as of July 2024