



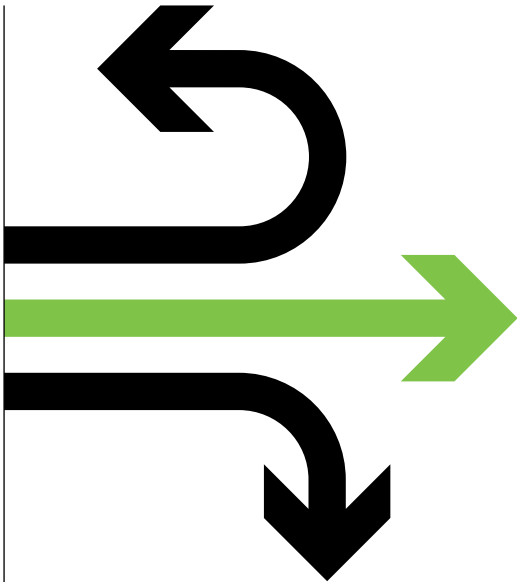
TOGETHER AGAIN

Annual Report 2021

OUTDOOR
MEDIA
ASSOCIATION

“PEOPLE WHO ARE TRULY STRONG LIFT OTHERS UP. PEOPLE WHO ARE TRULY POWERFUL BRING OTHERS TOGETHER.”

MICHELLE OBAMA



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HAMILTON MUSICAL, MICHAEL CASSEL GROUP

INTRODUCTION



ANNUAL REPORT 2021



WHO IS THE OMA?

The Outdoor Media Association (OMA) is the leading voice for Out of Home (OOH) advertising in Australia. We represent companies that own signs, display advertising, and provide services to the industry.

Our aim is to build a more sustainable industry for our members. We do this by promoting the creative potential of OOH, and by building constructive relationships with all our stakeholders: advertisers, agencies, government and the community. We provide leadership across four key functions:

- audience measurement and data management
- marketing and communications
- government relations
- services for our members

WHO IS MOVE?

MOVE (Measurement of Outdoor Visibility and Exposure) is the best-in-class system that measures audiences for OOH advertising.

Measuring OOH audiences is a tough challenge; signs can be anywhere and the people who see them are often on the move.

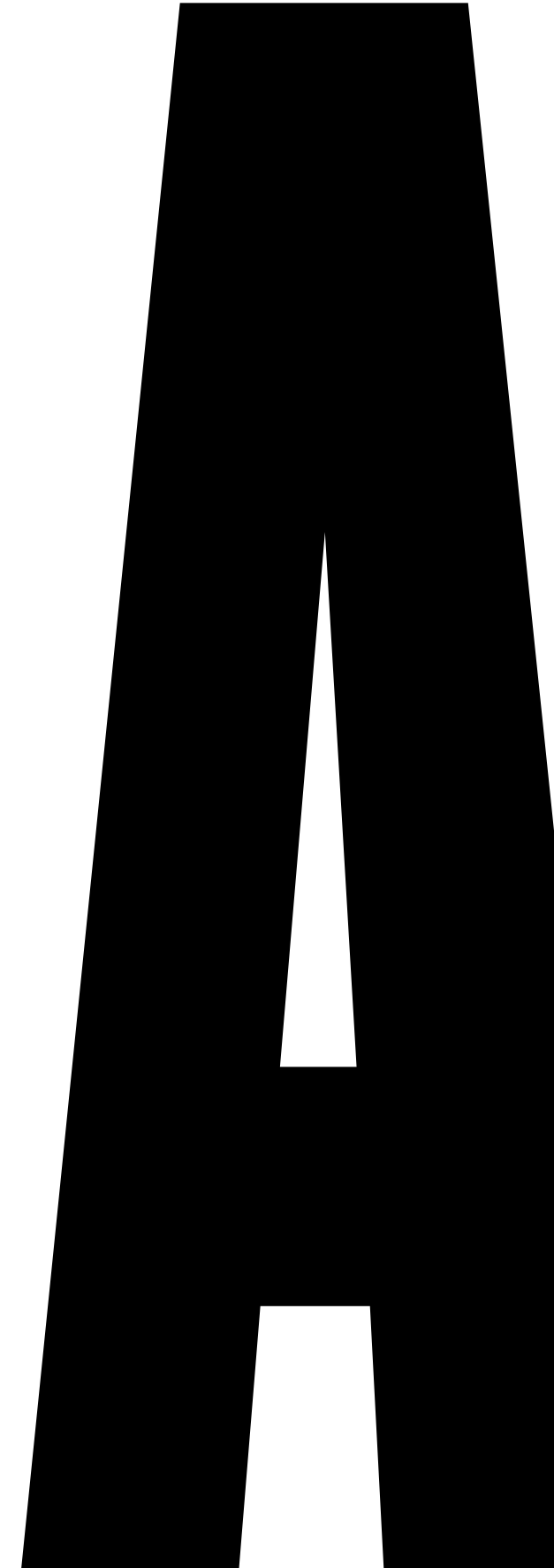
MOVE is a web-based system that measures the trips people take each day and the signs they encounter along the way to give a picture of who was likely to see an advertisement.

Agencies and advertisers can use this information to understand who is paying attention to signs and where, making the process of planning and buying campaigns easier.

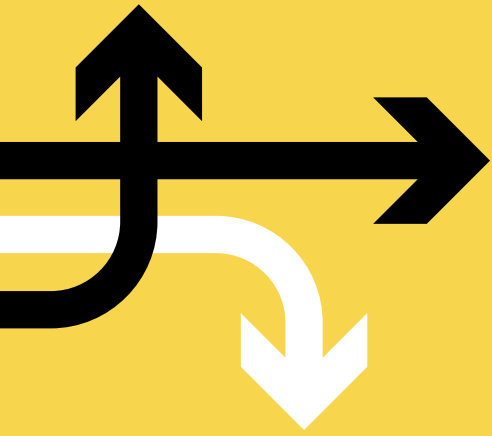
WHAT MOVE MEASURES

MOVE measures all OOH formats 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)
- roadsides



IMPACT



\$813M NET MEDIA REVENUE

An increase of 24 per cent since 2020



50% OF INDUSTRY REVENUE

In rent and taxes paid to government and landlords



17,000 ITEMS

We built and maintained infrastructure worth \$352M

\$17M COMMITTED TO BUILD MOVE 2.0

\$17M

\$3.2M

MEDIA SPACE DONATED TO PROMOTE HEALTHY DIET AND LIFESTYLE CHOICES VALUED AT \$3.2M

80K

MOVE MEASURED CLOSE TO 80,000 SIGNS

THIS YEAR, 1,610 USERS ACCESSED THE MOVE PLATFORM

On average, MOVE users logged in 29 times, a total of 47,000 logins, to determine the potential audiences for their campaigns.

1,610

695

IN 2021, MOVE TRAINED 695 MEDIA AGENCY STAFF & OMA MEMBERS

- 490 attended software training
- 190 attended methodology training
- 15 attended site classification training

400
George

100 YEARS OF THE
ARCHIBALD PRIZE

Presenting partner
Art
Gallery
NSW

ANZ

PURPOSE

UNITE

INNOVATE

SUSTAIN



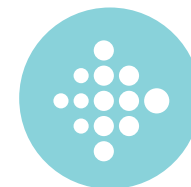
“In working on once-in-a-decade projects, the OMA has unified the industry and made it easier to buy Out of Home.”

PIA COYLE

Managing Partner, Avenue C, and Chair of the Outdoor Future’s Council



TO DELIVER OUR PROGRAM & COMMUNICATE AS ONE



TO MAKE OOH AN ESSENTIAL CHANNEL ON THE MEDIA PLAN



AND IMPROVE THE REGULATORY ENVIRONMENT FOR OUR MEMBERS

WHY WE DO IT

The Outdoor industry strives to positively influence and secure a sustainable future for the Australian community. We act on this purpose by doing what the industry should, and what members can’t.

VISION FOR THE FUTURE

Success for us is OOH taking its place as the number one, always-on place where people stay connected. We believe that through the power of our unity we can achieve this vision.



“With ongoing investment, MOVE 2.0, verification, better planning, better creative, programmatic, attribution and all the basics that have always made OOH so successful – the future for OOH is definitely looking bright.”

WENDY GOWER

Managing Director, Hearts & Science





Q2 TEAM

CHAIR'S MESSAGE



\$ \$17M

We committed \$17M to building and evolving our audience measurement system to be launched in 2024

\$ \$123M

The industry contributed advertising space valued \$123M in support of a variety of causes

55.8%

Digital OOH generated 55.8 per cent of our media revenue in 2021

ONCE AGAIN IT HAS BEEN MY HONOUR TO SERVE AS INDEPENDENT CHAIR OF THE OMA AND MOVE BOARDS

As I write this message, I am reminded of the toll that the pandemic lockdowns have had on our industry over the last 24 months. In 2021, the industry began its recovery despite continued disruption of audiences, posting \$812.7M in total net media revenue. That number is a welcome change from the previous year's results at the start of the pandemic, when revenue dropped to \$655.2M. This year, we increased our revenue by 24 per cent, but we are still trailing our pre-pandemic results of 2019 by 17 per cent.

Digital OOH (DOOH) continued to expand its slice of the revenue pie to 55.8 per cent of net media revenue, an increase from 55.2 per cent in 2020. Even though we saw our audience contract, advertisers continue to see the benefits of our digital evolution and the flexibility and immediacy our digital signs offer.

INNOVATE TOGETHER

OOH signs deliver advertising messages to the nine out of 10 Australians who leave home each day. It is our job to continuously improve how to make our signs easier for advertisers to plan, buy and measure more effectively. In 2021, the industry came together to build a suite of innovative tools that will give advertisers the assurance that we are the right channel to connect their brand with their customers.

At our first ever OUT-FRONT in November, we unveiled our updated audience measurement system MOVE 1.5, which includes a new qualitative metric for measuring impact called the Neuro Impact Factor. We also announced our new industry standards. We collaborated with the Media Federation of Australia's Outdoor Futures Council to deliver these three major projects, all of which were in market in January 2022.

We increased our investment from \$10M to \$17M toward building and evolving our audience measurement system. Slated for launch in 2024, MOVE 2.0 will account for the measurement of digital, regional and place-based audiences, building monthly, seasonal and hourly audience volumes. This world-leading development will ensure our buyers have access to more data while making our signs easier to plan and buy.

GIVE TOGETHER

In Australia, there are 56,000 registered charities that work across a broad range of areas, including health, education, social welfare, the environment and animal protection. This year, the industry gave \$123M in media space in support of these organisations as well as not for profits, and local sports, arts and community groups.

Adding to this contribution, our members also come together to support joint industry partnerships managed by the team at the OMA. Over the past decade, our members have donated more than \$10M in free media space toward our partnership with National Missing Persons Week. This is the thirteenth year that the Outdoor industry has sponsored National Missing Persons Week in New South Wales and the seventh year the campaign has run nationally in partnership with the Australian Federal Police.

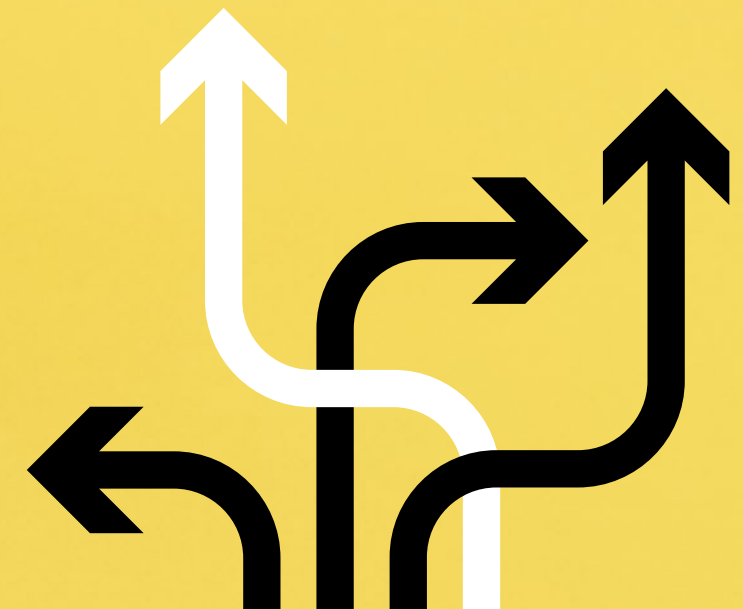
BRIGHTER TOGETHER

The pandemic and the economy will continue to test all industries, including Outdoor. But I believe the future is ours to shape. The OMA and MOVE teams and my fellow Board members are to be applauded for their leadership and ongoing commitment in directing our industry's future through the significant programs undertaken over the past two years.

In this report, you'll read more about what we are doing to help create a brighter future for the 93 per cent of Australians our signs reach every day as we aspire to be the place people stay connected.

Now that's a vision worth striving for.

CHARLES PARRY-OKEDEN
INDEPENDENT CHAIR



CEO'S MESSAGE



 **100%**

We represent close to 100 per cent of the OOH industry

 **FUTURE**

We're committed to being carbon neutral by the end of 2022

EVERYTHING IS BETTER WHEN WE ARE TOGETHER

Humans are meant to be together and roaming the great outdoors. It is hardwired into our DNA. Studies have shown that our brains are two times more alert when we are outside and therefore more likely to react to what is going on around us. This is a primal thing; survive and thrive.

The same story goes for our tribal instincts. We cannot escape the realities of our biology; connecting with others is as much part of us as our skin.

A UNIFIED INDUSTRY

It is with joy and satisfaction that I reflect on this year's achievements and progress. We saw our biggest period of membership growth with 10 new members joining the association, bringing the OMA close to representing 100 per cent of the industry. To our new members, a warm and sincere welcome.

This year, we also laid the groundwork for the future, in commencing a suite once-in-a-decade projects. The industry unified and became more cohesive as we turned away from crisis toward planning our recovery.

PROVING OUR IMPACT

The ability of our signs to broadcast messages at scale, and the added benefits of immediacy and flexibility that our digital signs offer, has propelled OOH further down the marketing funnel to reach audiences at the right moments with the right messages.

We are driven to be evidence led in everything we do, including when it comes to proving the efficacy of our signs. Our neuroscience study, the Neuro Impact Factor, conducted by Neuro-Insight provided undeniable evidence that our signs are effective and impactful. This world first major study measured the subconscious brain to gauge what the brain sees and how it lays down memory.

Long term memory encoding and emotion are key metrics linked to sales outcomes and our \$1.3M study proved that OOH signs trigger these vital memory and emotion centres in the brain.

We responded to requests for a better digital measurement system by updating our world-class MOVE system. MOVE 1.5 gives buyers and planners an audience measurement metric for digital signs, as well as qualitative metric that measures the impact of campaigns using the results of our neuroscience study. We spent 2021 building these tools which we launched in January 2022.

A RESPONSIBLE AND COMMITTED INDUSTRY

As our signs operate 24/7 in the public domain, it is our obligation to meet the self-regulatory codes that guide the content of our signs. This year we continued to uphold the gold standard in advertising content with no breaches issued by Ad Standards, our industry regulator, for OOH advertisements.

Our signs have the power to influence positive behaviour change. We recognise it is our responsibility to use this power for good, which is why this year we became an active supporter of government efforts to tackle societal issues such as obesity. In the first year of our National Health and Wellbeing Policy, the industry solidified its commitment by running its first \$3M campaign with the Australian Department of Health to promote healthy lifestyle decisions. We know it's important that we play our part with this policy, and we can achieve this by supporting health promotion campaigns.

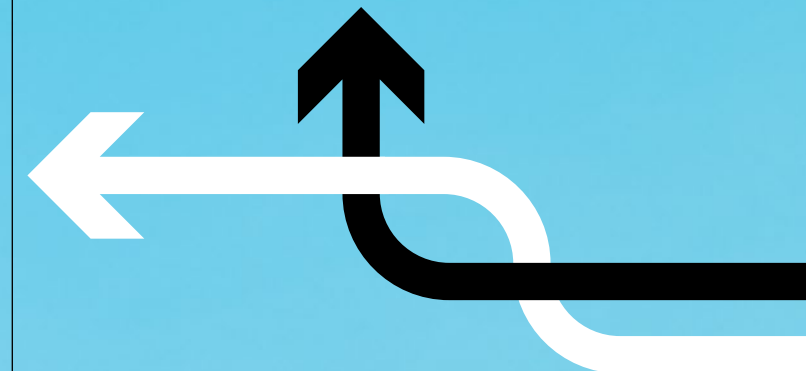
A MORE SUSTAINABLE FUTURE

For all our businesses, the environment and sustainability will need to be embraced beyond the rhetoric. This year, the industry announced its commitment to offering advertisers the opportunity to carbon offset their campaigns, and for our members to take steps toward carbon neutrality and Net Zero. The time for talking is over. Now is the time to walk the talk and show off what our values and purpose are when it comes to the environment.

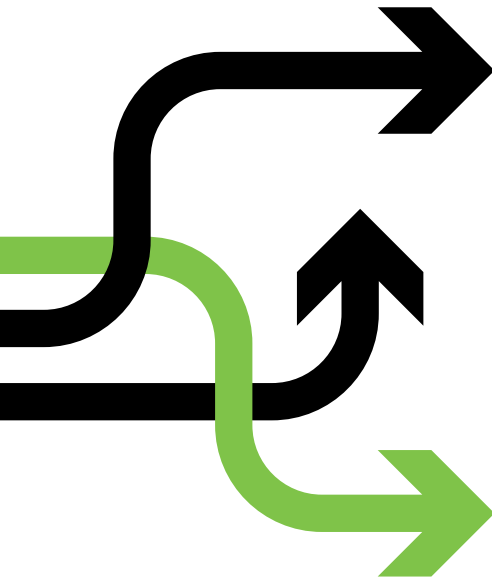
Call them billboards, call them posters, call them wraps, or call them screens. Whatever you call them, our industry is united in the knowledge that we can do anything and get through any crisis by working together with optimism and a great plan.

I am proud of all we have done this year and I hope you share in our pride as you dive into our achievements in this Annual Report.

CHARMAINE MOLDRICH
CEO, OMA & MOVE



OMA & MOVE BOARDS



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 membership in the OMA since 1995. Brad was a Director of the OMA Board from 2006 to 2017 and re-joined 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 16 years. Noel joined the OMA Board in 2019.



CHARLES PARRY-OKEDEN
INDEPENDENT CHAIR
EXECUTIVE CHANNEL HOLDINGS

Charles has over 30 years of media experience in predominantly Out of Home advertising. He is co-founder and CEO of Executive Channel Holdings Pty Limited (ECN) and Australian Media Channel Pty Ltd (Media i and Mi-3), as well as the president of Media Eye France. Charles was appointed to the position of Independent Chair of the OMA and MOVE in 2019.



ROBBIE DERY
OOH!MEDIA

Robbie's 25-year career spans aviation, financial services and media sectors across the UK, European and North American markets. Since 2008, Robbie has led the commercial agenda for airports and billboards, Qantas Lounges and inflight entertainment, rail and street furniture businesses, and is also responsible for oOh!media's Product Strategy division. 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.



KIRSTY DOLLISSON
TORCHMEDIA

Kirsty has 25 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 offering 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 22 years of experience in the media sales industry, 14 of which have been with JCDecaux. As Chief Commercial Officer, Max oversees the strategic management and growth of the business's advertising sales and ensures advertising and marketing strategies for the advertising assets are optimally matched to clients to achieve 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.



CATHY O'CONNOR
OOH!MEDIA

One of Australia's most recognised media industry leaders, Cathy O'Connor became CEO and Managing Director of oOh!media in January 2021 following 12 successful years at the helm of Nova Entertainment. Cathy is Chair of the Sony Foundation and previously served on the Commercial Radio Australia Board. Her numerous career achievements include a Telstra NSW Business Women's Award, a Centenary Medal, and induction into the Commercial Radio Hall of Fame. Cathy has been a Director of the OMA and MOVE since 2021.



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, growing the organisation and establishing himself as a dynamic and leading force in the Out of Home industry. In 2004 Steve joined JCDecaux Australia as CEO and he has been a Director of the OMA and MOVE since 2004.



JOHN O'NEILL
QMS MEDIA

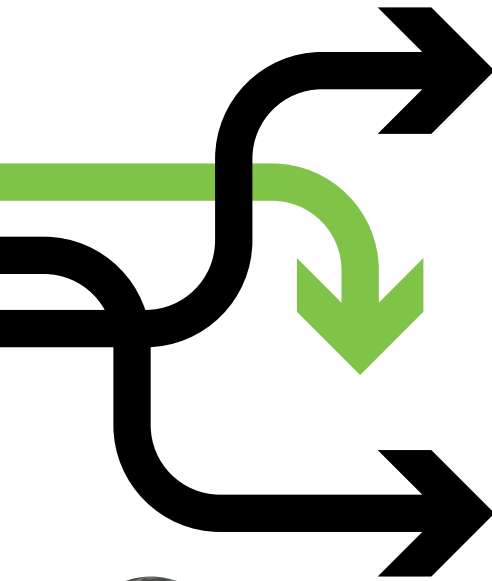
John has over 25 years of experience in the Out of Home industry developing and leading high-performance sales teams at QMS Media, EyeCorp, Media Puzzle and oOh!media. As CEO of QMS, John is instrumental to its continued strong growth and performance as leaders in high impact digital Outdoor. John has 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 and MOVE since 2014.

OMA & MOVE STAFF



CHARMAINE MOLDRICH
CHIEF EXECUTIVE OFFICER
OMA & MOVE

Charmaine has over 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. She is a non-voting member and public officer on the OMA Board and an appointed Director on the MOVE Board.



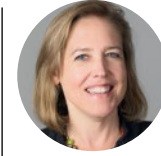
KYLIE GREEN
GENERAL MANAGER
OMA & MOVE

Kylie is responsible for the day-to-day management of both the OMA and MOVE. She oversees and manages the implementation of strategic plans, budgets, HR processes and procedures. Kylie has been with the OMA since 2012.



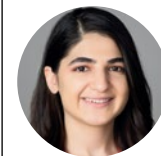
GRANT GUESDON
MOVE 2.0 LEAD
MOVE

Grant has over 16 years of experience in media planning and buying, and 23 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 2024. Grant has been with MOVE since 2008.



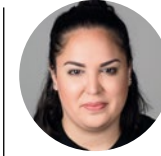
JULIE JENSEN
MARKETING DIRECTOR
OMA & MOVE

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 industry communications including the Neuro Impact Factor and the first ever OUT-FRONT in 2021. Julie first joined the OMA in 2013, took a three-year sabbatical, and returned in 2018.



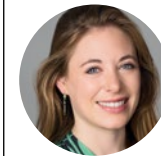
GANJINA NOZAKOVA
SYSTEMS & TRAINING MANAGER
MOVE

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 Administration 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, at a NSW Government Minister's office, and at 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.



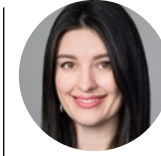
JEMIMA SOUTHGATE
EXECUTIVE ASSISTANT TO THE CEO
OMA

Jemima provides day-to-day support to the CEO, is responsible for office administration and supports member services. She has close to 20 years' experience across a variety of administrative roles, managing busy offices, projects, teams and executives. Jemima joined the OMA in 2021.



JOSE VALDERRAMA
MOVE ASSISTANT
MOVE

Jose is responsible for the day-to-day management of MOVE, data updates, market audits, providing helpdesk functions to system users and general IT, finance, and HR support to the team. Jose has experience in training and customer service, as well as qualifications in Project and Program Management. He also holds a Bachelor and Master of Music. Jose joined MOVE in 2021.



EMMA WARD
COMMUNICATIONS MANAGER
OMA & MOVE

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

JORGE BARBOSA
MOVE ASSISTANT
MOVE

Until June 2021

EMMA CARR
GENERAL MANAGER, GOVERNMENT
RELATIONS, OMA

Until September 2021

MADDIE THOMAS
MARKETING & OFFICE ASSISTANT
OMA & MOVE

Until October 2021



MECCA

One gift card, thousands of beauty choices

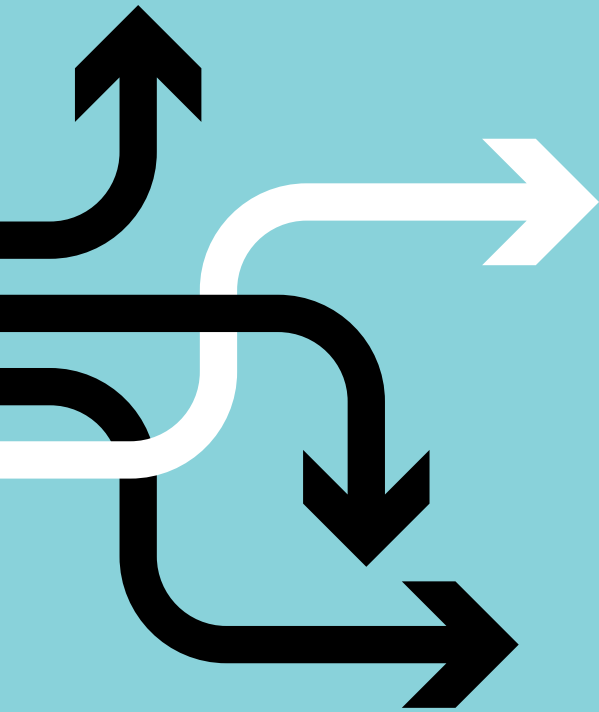


Last minute instant gifting?
Send an e-gift card here!

Collect your Gift Card here

INNOVATE

OUT OF HOME



As one of the only growing traditional media channels, OOH advertising delivers a range of benefits to modern cities and their inhabitants. While digital disruption has caused other traditional media channels to lose audiences and market share, OOH remains the only media channel that can reach mass audiences and broadcast to *93 per cent of Australians each day*, delivering information and ideas outside people’s personal online bubbles.



THE NEURO IMPACT OF OUT OF HOME

Neuroscience allows us to explore the subconscious and helps uncover the mysteries of how memories are made. It is the key to providing undeniable evidence as to how the brain processes what we see, in the case of OOH, measuring the impact of a single glance. The findings of our neuroscience study *The Neuro Impact of Out of Home* show the impact of our signs by measuring the subconscious, providing scientific proof of the effectiveness of digital and classic OOH campaigns.

Neuro-Insight, a leading neuromarketing firm, conducted the OMA’s neuroscience study. The study used eye-tracking and brain-imaging technology to measure the brain’s neural responses to advertising on classic and digital signs. The findings came directly from the brains of 2,000 participants who interacted with more than 800 signs. With over one million data points measuring the impact of a glance, it was the world’s most extensive media neuroscience study.

The results allowed us to create an algorithm called the Neuro Impact Factor. We have built this new algorithm into our updated audience measurement system MOVE 1.5 as a qualitative metric to help planners and buyers better understand the impact of their campaigns.

93%

Each day, 93 per cent of Australians connect with OOH advertising across the country

2,050

Our neuroscience study on the impact of OOH included 2,050 participants

OUT-FRONT

We announced a suite of new tools at the Outdoor industry’s first-ever OUT-FRONT event on 9 November 2021. With big projects in the pipeline, the industry united to reveal initiatives available for agencies and clients from 31 January 2022. OUT-FRONT was broadcast virtually due to the COVID restrictions, but we anticipate that future events will be in person.

Our OUT-FRONT was an opportunity to introduce three major undertakings: MOVE 1.5, the Neuro Impact Factor, as well as our updated industry standards. We covered new ways to reach audiences, illustrated campaign impact, and introduced new industry-wide standards.

The OUT-FRONT event, hosted by our CEO, Charmaine Moldrich and General Manager, Kylie Green, featured discussions with Data and Insights Director for oOh!media, Tara Coverdale; Managing Partner of Avenue C and Outdoor Futures Council Chair, Pia Coyle; and MOVE 2.0 Lead Grant Guesdon. A Q&A session on new standards followed presentations, with Executive General Manager, Revenue Strategy and Operations for JCDecaux, Cassandra Cameron; Chief Customer Officer for QMS Media, Mark Fairhurst; and National Head of Investment for MediaCom, Nick Thomas.



MOVE 1.5

MOVE is one of Australia’s most robust and accurate audience measurement systems. As we evolve MOVE, we are upgrading the way businesses can plan, buy and measure OOH advertising.

Built into the current system, MOVE 1.5 gives more accurate weekly audience numbers for OOH campaigns – both digital and classic. MOVE 1.5 upgrades audience measurement to include digital signs and considers its unique qualities using:

- 01 visibility of the sign
- 02 the length of dwell of the sign
- 03 the length of audience dwell in all OOH environments
- 04 the share of time bought

MOVE 1.5 also includes a new tool, the Neuro Impact Factor, a world-first, qualitative metric based on the findings of our neuroscience study. The Neuro Impact Factor goes beyond attention to measure impact, allowing buyers and planners to choose formats that deliver the right audience coverage and impact.

Neuro-Insight developed the Neuro Impact Factor through a media-agnostic, comprehensive study that measured the subconscious impact of all OOH formats. The study found that memory and emotion are crucial ingredients in advertising effectiveness. Using granular data, the Neuro Impact Factor measures real-time impact, capturing memory and emotion in the moments they peak in the brain.

Nine out of 10 people leave home each day, making OOH a highly effective broadcast media channel. But now, neuroscience has proven the role OOH plays throughout the advertising funnel. With the Neuro Impact Factor, buyers and planners can focus on where in that funnel they want their OOH advertising campaign to sit and drive effective results for advertisers.

Driven by science, the updated MOVE 1.5 combines reach, frequency and impact to guide classic and digital investment, providing businesses with a more in-depth understanding of audiences. As we move away from traditional CPM, MOVE 1.5 heralds a new dawn for OOH audience measurement, allowing us to identify who is seeing and being impacted by advertising.

STANDARDISATION

New industry standards provide greater clarity for buyers through agreed criteria for terminology, geography, screen ratios, insertion orders, and transacting using the currency by Share of Time.

Agencies can now use this industry standard Share of Time when planning their campaigns, making it easier to buy the location and environment that meet desired campaign objectives.

VERIFICATION

The Outdoor industry continued to work on making verification a seamless service for advertisers. The OMA and its members worked closely with agencies, clients and verification service suppliers to ensure that correct and independent standards provided proof that campaigns were executed.

A verification sub-committee, comprising experts from OMA membership, helped develop the verification standards and worked closely with the Media Federation of Australia's Outdoor Futures Council verification sub-group. To date, we have carried out verification testing with four verification providers. The sub-committee also agreed that SOC 2 compliance would be a requirement for verification providers within an agreed grace period. The OMA verification sub-committee has met weekly since June 2021.

MOVE 2.0

Building MOVE from 2005 to 2010 was a herculean task for the industry. Its launch in 2010 introduced a new currency, Likelihood to See, which was the catalyst for an industry renaissance, as it introduced the first ever attention measurement in advertising. OOH remains the only traditional media channel undisrupted by the internet, and we have credible and powerful audience measurement to support this claim.

In less than five years, OOH was in the top three media channels bought by agencies. OOH moved up from sixth place and overtook magazines, print and radio to sit beside online and TV channels.

While being the instigator of change, MOVE was supercharged by the rapid introduction of digital signs. As digital advertising increased, the share of income generated by digital signs rose from seven per cent to over 50 per cent. Today, digital accounts for 60 per cent of revenue.

The digital transformation was the impetus for an evolution to MOVE 2.0 slated for launch in 2024.

The evolved MOVE 2.0 system will measure: digital and static sign audiences nationally in metropolitan, as well as regional Australia. MOVE 2.0 will also provide

measurement that allows for seasonal audience variations, with detailed data allowing users to see changes in audience by the hour, week and month.

Together with agencies and clients, we are ensuring that the new system tells the whole story and works for all users.

NET ZERO


As an industry that works in the public place, we are mindful of our responsibilities to the environment. In a media channel first, the Outdoor industry has pledged to move toward carbon neutrality in 2022. To meet our commitment, the industry will explore ways to easily calculate the carbon output of OOH campaigns and give advertisers the chance to offset and reduce the carbon impact of their media spend.

PICTURED OPPOSITE
HOLEY MOLEY, CHANNEL 7

PICTURED BELOW
TASTE CHALLENGE 2021, PEPSICO



Gas, electricity and happiness from Momentum.

 momentum energy | Get happy

If you're feeling ho-hum about your power company, maybe you'd be happier with Momentum.

Because it feels good knowing you've backed



 momentum energy

Warm fuzzies

Effective relief from 2021

80% unicorn

Put contents gently to release the feeling of a puppy falling asleep in your lap, or a stranger complimenting your shoes. Or knowing your power company supports renewables and Aussie jobs.

Momentum Energy is 100% owned by Australia's largest renewable energy provider, Origin Energy. If you'd like to switch to a happier, warmer power company, visit momentum.com.au/gethappy

1800g net



 momentum energy

Wishing stars

Sustainably sourced from local galaxies

Have you ever tried to bring on your favorite night with over a million imaginary constellations?



 momentum energy

Rainbow seeds

Ethically harvested from the world's brightest



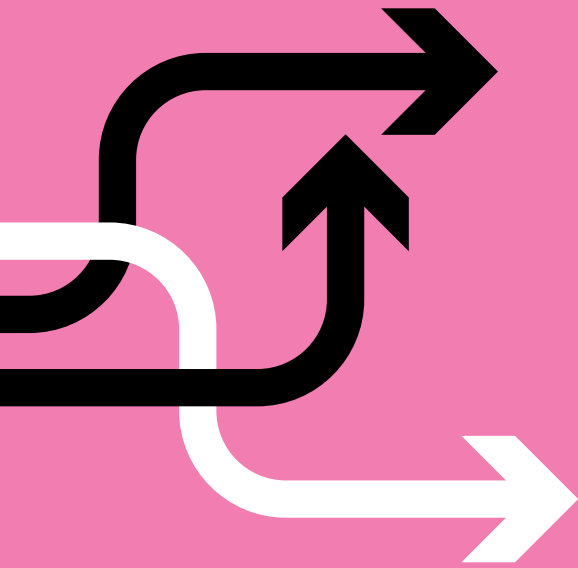
Our Green Gold



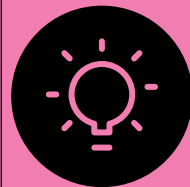
OUR GREEN GOLD, AUSTRALIAN AVOCADOS

0
CELEBRATE
4

CREATIVITY



OOH advertising is part of the iconography of the city and we are on a mission to raise the bar on OOH creativity. We want advertisers to improve their outcomes by using the full capabilities of our channel's creative potential.



The possibilities and opportunities of the Outdoor canvas are endless: the classic gallery, the innovative hub with live data feeds, dynamic content, sound clouds, event and weather triggers.

CREATIVE COLLECTION

The evolving OOH landscape provides advertisers with boundless new ways to connect with people. Our digital signage network delivers messages in real time with flexibility and immediacy. Our classic signs offer a campaign scale to reach audiences time and time again.

The OMA began the Creative Collection competition in 2013 to acknowledge and celebrate the most creative and innovative OOH executions each quarter.

This year we introduced a new category, OOH for Good, to celebrate the outstanding not-for-profit and government campaigns that use OOH to convey important messages and unite the community on societal issues.

The Creative Collection categories are:

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

PICTURED BELOW
STOP IT AT THE START, AUSTRALIAN GOVERNMENT



In 2021, we received 120 entries, an increase of 40 per cent on the prior year, from brands advertising football games, avocados, sandwiches, cryptocurrency trading platforms, and even funeral services.

A huge thank you to our judges, who lent their expertise and time:

Andy Athans, Group Marketing Manager, Val Morgan Outdoor (VMO)

Shelley Davis, Associate Marketing Manager, Expedia Group - Wotif

Jessica Debrodt, Founder, Jessica Debrodt Marketing and Communications

Tim Elder, National Head of Sales - Direct Clients, Independent Agencies, Boutique Agencies, oOh!media

Ged Hart, Managing Director, Total Outdoor Media (TOM)

Nick Karaloukas, General Manager, Australian Outdoor Sign Company (AOSCo)

Tim Kirby, Founder, Galore

Chris Laws, Managing Director, Enigma

Brent Liebenberg, Executive Creative Director, Khemistry

Jesse McIntyre, Head of Sales, AOSco

Charmaine Moldrich, Chief Executive Officer, OMA

Stephanie Say, National Communications and Partnership Manager, The Big Issue

Michael Selden, Head of Sales and Platforms, Jolt Charge

Mike Spirkovski, Chief Creative Officer, Saatchi & Saatchi Australia

Ben Walker, Chief Executive Officer, Shopper

Emma Ward, Communications Manager, OMA

Sian Whitaker, General Manager, Broadsheet Media

Mark Wooldridge, Advertising Lead - Public Transport, Transport for NSW

120 ENTRIES TO THE CREATIVE COLLECTION COMPETITION CELEBRATING INNOVATION IN OOH ADVERTISING.

AWARDS

CREATIVE COLLECTION WINNERS

Grand Prix Winner 2021

Australian Avocados, *Our Green Gold*
(pictured p.30)

Honourable Mention

MECCA, *The Beauty Spectacular Gift Card Vending Machine*
(pictured p.22)
and
Art Gallery of NSW, *Archibald 100*
(pictured p.8-9)

Q1

QUARTER ONE

Big, Bold & Bright

Subway, *Subway Footlong Fame*

Honourable Mention

Sydney Gay and Lesbian Mardi Gras, *Mardi Gras Parade*

Best Use of Multi-Format

PepsiCo, *Taste Challenge 2021*

Best Use of Digital

Daikin, *Daikin Summer Campaign*

Innovation in Out of Home

Channel 7, *Holey Moley 'Guess the Golf Balls'*

Out of Home for Good

Australian Government, *Stop it at the Start*

Q2

QUARTER TWO

Big, Bold & Bright

Art Gallery of NSW, *Archibald 100*

and

Tourism Tasmania, *Winter Launch*

Best Use of Multi-Format

Australian Avocados, *Our Green Gold*

Best Use of Digital

AFL, *2021 AFL Men's Season Launch*

Honourable Mention

BIG Outdoor, *BIG Love for Mum*

Innovation in Out of Home

Wotif, *Kid Approved Trips*

Out of Home for Good

SA Health, *SA Health COVID Vaccination Campaign*

Q3

QUARTER THREE

Big, Bold & Bright

Channel 7, *The Voice*

Honourable mention

Sharesies, *Let's Get Growing*

Best Use of Multi-Format

Freedom Foods, *Australia's Own - Nurtured by Nature*

Best Use of Digital

Bare Cremation, *#didntseethatcoming*

Innovation in Out of Home

Foxtel, *Wentworth - The Final Sentence*

Honourable Mention

BTC Markets, *BTC Markets Live Crypto Feed*

Out of Home for Good

Australian Government, *Arm Yourself*

Q4

QUARTER FOUR

Big, Bold & Bright

Coca Cola, *Mount Franklin Lightly Sparkling*

Honourable Mention

Amazon Prime Video, *Wheel of Time*

Best Use of Multi-Format

Momentum Energy, *Get Happy*

Best Use of Digital

Expedia Group - Wotif, *Wotif Local Getaways*

Innovation in Out of Home

MECCA, *The Beauty Spectacular Gift Card Vending Machine*

Out of Home for Good

Red Cross, *Red Cross LifeBlood - Bloody Oath* and
RSL Australia, *Remember to Remember, Remembrance Day*



INDUSTRY AWARDS

OMA members and their teams are hardworking and passionate industry advocates. We established the OMA Industry Awards to reward those individuals who go above and beyond in service to the industry and take Outdoor to new heights.

Winners took centre stage to receive their accolades at the OMA's Annual General Meeting in May. Congratulations to the talented and dedicated recipients. Thank you for all that you do.

Excellence in Innovation Award

Tara Coverdale, oOh!media

Outstanding Service Award

Bel Harper, oOh!media

OMA Industry Award

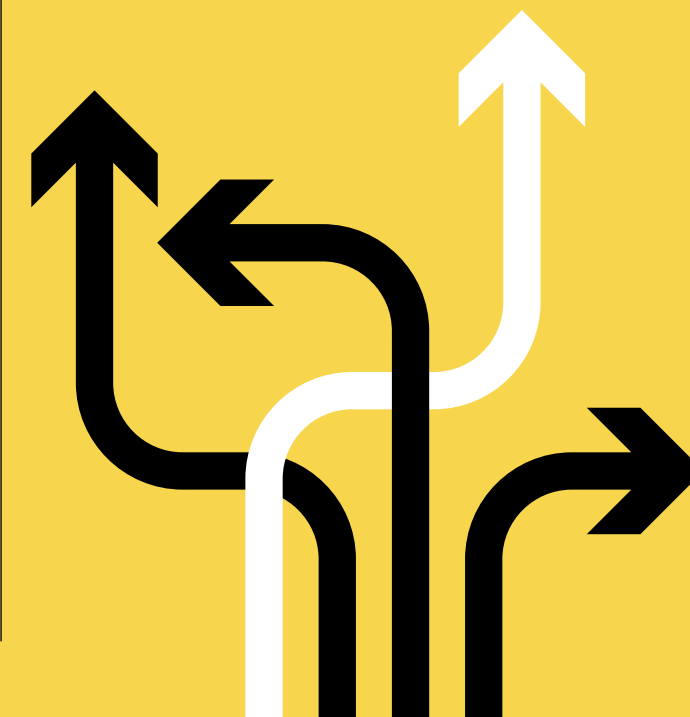
David Watkins, JCDecaux
Sheila Lines, oOh!media

Rising Star Award

James Nettlefold, QMS Media

Hall of Fame

David Nettlefold
George Savage (posthumous)
Mike Tyquin Senior



MEDIA i AWARDS

A personal touch and down to earth spirit mean Outdoor sales representatives are some of the best around. Our members' sales teams routinely take the limelight at the Media i Awards for their outstanding media sales excellence. Congratulations to the individuals and teams who were recognised at this year's awards.

Outdoor/Cinema Salesperson of the Year

Warwick Keil, oOh!media, VIC
Natasha Jarrett, oOh!media, SA
Damien Bodestyne, JCDecaux, WA

Sales Team of the Year

oOh!media, SA & WA



“The Federal Government’s Stop it at the Start campaign conveys an important and powerful message, urging Australians to break the cycle of violence against women through conversations about respect.”

STEPHANIE SAY

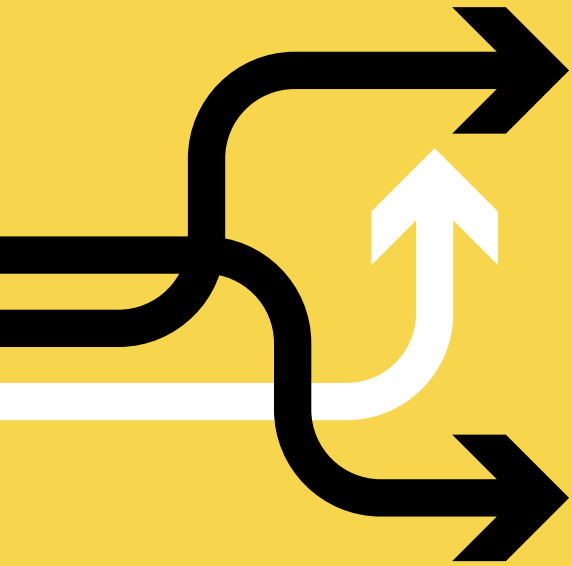
National Communications & Partnerships Manager
The Big Issue (Q1 Judge)





CONTRIBUTE

COMMUNITY



COMMUNITY COMMITMENT AND CHARITY CONTRIBUTION

The Outdoor industry plays an important role in the community, supporting the arts, sports and charitable organisations. This year, OMA members donated advertising space valued at more than \$123 million to over 160 community groups and charities.

The OOH channel delivers further benefits, with 50 per cent of its revenue returned to government through taxation and rent paid to other landlords, including superannuation holdings. OOH advertising is one of the most trusted channels used for broadcasting government and community awareness messages. Governments have recognised the new opportunities to inform local communities in real time, using digital signs to communicate safety and health messaging.

NATIONAL MISSING PERSONS WEEK CAMPAIGN (NMPW)

OOH signs across Australia profiled missing people as part of National Missing Persons Week, from Sunday 1 August to Saturday 7 August 2021. The theme of the 2021 campaign was *Their face might have changed. Missing them hasn't*, to help raise awareness of long-term missing Australians and the impact missingness has on their families. The campaign was developed using age-progression technology to show how a person's appearance can change over time.

"When someone has been missing for a decade or more, we acknowledge that their appearance would naturally have changed from the last photograph their family has of them. This technology helps us develop an image that simulates what the missing person could look like today. The AFP Forensic artists use their specialist skills to create the new image, whilst working closely with the families to ensure genetic factors are strongly considered." Jodie McEwan, Coordinator, AFP National Mission Person Coordination Centre.

The 2021 campaign marks the thirteenth year the Outdoor industry has sponsored NMPW in New South Wales, and the seventh year it has run nationally, in partnership with the Australian Federal Police.



WITH MORE THAN \$10M OF ADVERTISING SPACE DONATED BY OMA MEMBERS SINCE 2009, NMPW IS THE INDUSTRY'S LONGEST STANDING COMMUNITY PARTNERSHIP.

2021

The OMA continued to work closely with community groups and state and local government regulators to ensure that planning controls promoted safe, high-quality signage and advertising, particularly in the context of new and emerging technologies

OOH

Advertising is always on: it cannot be blocked or fast-forwarded

REMEMBRANCE DAY CAMPAIGN

Thanks to RSL Queensland's national partnership with the OMA, all Australians were prompted to *Remember to Remember* on 11 November.

At 11am on Remembrance Day, our members' digital signs displayed the RSL's message, reminding Australians to pause for one minute's silence to remember those who served and sacrificed in all wars and conflicts.

Adding his voice and influence to the *Remember to Remember* campaign was veteran, and three-time Paralympic gold medalist, Curtis McGrath OAM.

Curtis lost both legs after stepping on an explosive device while serving in Afghanistan. This year, he worked alongside RSL Queensland to shine a light on those who served this country, those who returned home injured or ill, and those who continue to serve.

The OMA and its members have been valued supporters of RSL Queensland's commemorative campaigns for the past two years.

ANZAC DAY LIGHT UP THE DAWN CAMPAIGN

OMA members continued their support for *Light Up the Dawn* which was promoted nationwide on digital signs in the lead up to Anzac Day. *Light Up the Dawn* is an RSL initiative instituted in 2020 to mark Anzac Day when the traditional march was cancelled due to COVID-19 restrictions. Australians were encouraged to honour the armed forces at 6am on Anzac Day in an at-home vigil, lighting a candle in their driveways, on their balconies and in their living rooms to commemorate the nation's veterans.

In 2021, *Light Up the Dawn* again encouraged Australians to come together. Whether gathering for public services or participating in private reflection, Australians could choose how to honour the service and sacrifice of veterans on Anzac Day.

PICTURED BELOW
REMEMBER TO REMEMBER, REMEMBRANCE DAY, RSL AUSTRALIA
GARY COONAN, QMS MEDIA; DOUGLAS WALLER, RSL QUEENSLAND; AMY SAMS, BIG OUTDOOR; JESSE MCINTYRE, AOSCO; JACOB COURTNEY, BISHOPP OUTDOOR ADVERTISING; AND AFGHANISTAN VETERAN AND THREE-TIME PARALYMPIC GOLD MEDALIST CURTIS MCGRATH OAM





PICTURED ABOVE
TOGETHER AGAIN, OMA MEMBERS

PICTURED OPPOSITE
LIGHT UP THE DAWN, RSL AUSTRALIA
25 YEARS BIG, THE BIG ISSUE

TOGETHER AGAIN CAMPAIGN

In our industry's bid to encourage vaccination we launched our own campaign, *Together Again*. The campaign promoted the things we could do again together once we were all vaccinated: seeing live performances, sharing barbecues, or enjoying a beer at the pub. The campaign was delivered across digital networks in two phases. The first phase amplified the message *Together Again* — a reminder that reconnecting with loved ones is within easy reach if we get vaccinated. As each state reached their vaccination target to open-up, phase two focused on celebrating our collective achievement, with the final words — *Together We Did It*.

The *Together* campaign ran on OOH signs in Victoria, Queensland, South Australia, Western Australia and New South Wales.

THE BIG ISSUE

The Big Issue makes a difference to the thousands of people experiencing homelessness, marginalisation or disadvantage. The country's largest social enterprise celebrated its 25th anniversary in 2021. To mark the occasion, The Big Issue developed a *25 Years Big* campaign that put vendors at the heart of the story.

The campaign creative featured fun, colourful illustrations by artist Rami Niemi that captured the likenesses and personalities of vendors around the country. Many OMA members chose to run the campaign on available space with the simple call to action: buy The Big Issue magazine.

STAY KIND

With the enduring stress of lockdown, *Kind July* was a timely reminder to look out for your friends and family. Stay Kind is an Australian not-for-profit that promotes harm reduction through kindness. The organisation encourages Australians to be kind, inclusive, courageous, respectful and to never give up. The movement was established by Ralph Kelly after his son Thomas Kelly was a victim of a one-punch assault in Kings Cross.

Kind July has run since 2019 and acts to bring the community together with a common goal. Seen on OOH this year, the campaign aimed to spread the #staykind message: to do something kind for a loved one or a stranger this July. OMA members supported this vital campaign by spreading the word on OOH for *Kind July*, showing what a little kindness can do.

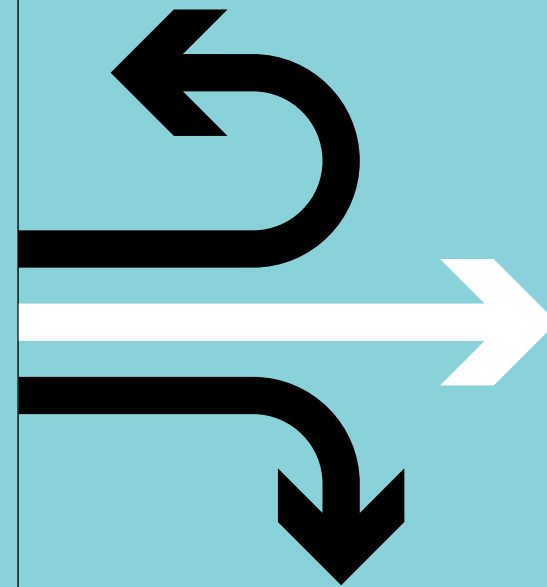


WENTWORTH THE FINAL SENTENCE, FOXTEL



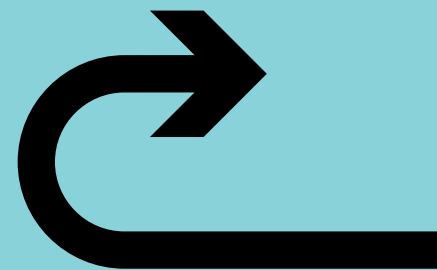


CODE OF ETHICS



The Outdoor audience is broad. It includes people of every age, race, gender and religion, which is why we take our responsibility in the public space seriously. We strive to meet prevailing community expectations on the advertising we post on our signs. Our Code of Ethics also mandates that our members adhere to the 18 self-regulatory codes, policies and guidelines we have in place, making us a mature, contemporary and responsible industry.

PICTURED OPPOSITE
TOGETHER WE RISE, NSW GOVERNMENT
DID SOMEBODY SAY, MENULOG
PICTURED BELOW
GLAD OCEAN RECYCLED BIN LINERS, CLOROX



POLICIES AND CODES

All OMA members are mandated to adhere to the policies within the Outdoor industry's self-regulatory framework. We work closely with Ad Standards, the Australian Association of National Advertisers, Advertising Council Australia and the Alcohol Beverages Advertising Code to ensure advertising displayed by our members aligns with industry best practice and meets community expectations. There are 10 self-regulatory advertising industry codes of practice administered by these organisations. In addition, OMA members have developed eight self-regulatory guidelines and policies to ensure that we meet our community obligations. In total, 18 specific self-regulated codes and policies govern OMA members and the wider OOH advertising industry.

FRAMEWORK

PICTURED OPPOSITE
WORLD EQUALITY DAY, BUMBLE
BEAUTIFUL BUSINESS, XERO



CODES

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

Adhering to the OMA Code of Ethics is a pre-requisite of membership. The Code is a set of principles that defines 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.

OOH ADVERTISING IS ALWAYS ON, DELIVERING MESSAGES 24 HOURS A DAY, SEVEN DAYS A WEEK.



COMPLAINTS



1%

Annual OOH code breaches have reduced by 75 per cent since 2011 and currently represent less than 1 per cent of all advertising campaigns run on OOH

COMPLAINTS AND BREACHES

The self-regulatory system is monitored by the Ad Standards Board, an independent panel that determine compliance with the AANA Code of Ethics, the main self-regulatory scheme for the entire advertising industry in Australia.

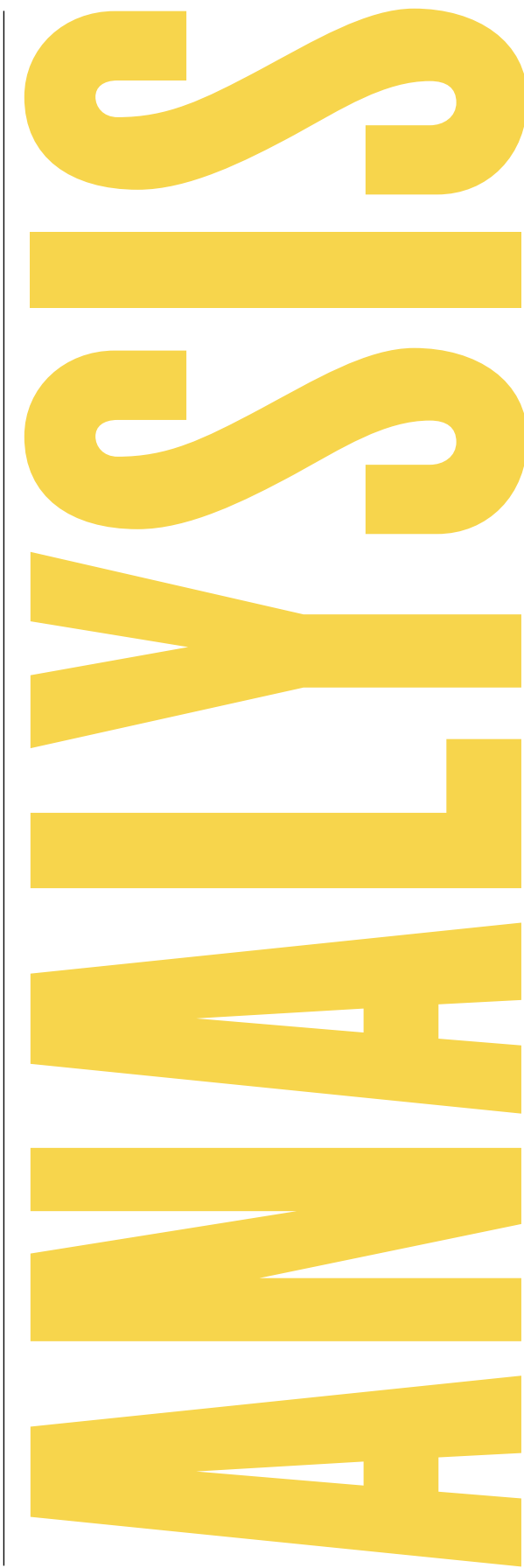
Most OOH advertisements do not receive community criticism or complaint, and of those that do, most are found to not breach any codes. This year, we are proud to report that no OOH advertisements submitted to the Ad Standards board last year breached the AANA Code of Ethics.

To ensure our members uphold the industry gold standard in advertising content, we run a series of education and advertising pre-vetting initiatives:

- 01 A national program of content training for members
- 02 A copy advice service based on our advertising content policy
- 03 A concept advisory service for advertisers and creative agencies to use at the early stages of campaign development

YEAR	NUMBER OF COMPLAINTS UPHELD*	PERCENTAGE OF COMPLAINTS TO AD STANDARDS	AANA GUIDELINES CONTRAVENED
2021	0	2.01%	None
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, health and safety
2011	8	39.1%	Sex, sexuality and nudity

* Source: Ad Standards (adstandards.com.au)



COMPLAINTS BY MEDIA (%) 2021

MEDIA	2021
App	0.45%
Billboard	1.03%
Billboard - Digital	0.49%
Billboard - Interactive	0.02%
Billboard Mobile	0.11%
Cinema	0.17%
Email	0.68%
Flying banner	0.06%
Internet	2.93%
Internet - social media	8.43%
Mail	0.64%
Outdoor	0.49%
Packaging (alcohol)	0.58%
Poster	1.18%
Print	0.90%
Promotional material	0.81%
Radio	3.17%
SMS	0.36%
Stadium/arena	0.04%
Transport	0.53%
TV - free to air	65.54%
TV - on demand	5.97%
TV - out of home	1.90%
TV - pay	3.51%
Total	99.99%

Source: Ad Standards (adstandards.com.au)

COPY AND CONCEPT ADVICE

Our copy advice service helps eliminate the likelihood of a breach by determining whether the proposed advertisement:

- is discriminatory, uses sexual appeal appropriately, adheres to public safety
- contains violence that cannot be justified in its context
- uses language suitable for a broad audience

In 2021, the OMA reviewed 368 advertisements submitted to the OMA copy and concept advice service.

- 66 were rejected
- 30 were modified to comply with the codes

EDUCATION



ADD AN EXTRA HANDFUL OF VEGGIES

The more research we do, the more we learn about OOH advertising's ability to influence and drive behavioural change.

In January 2021, the Outdoor industry in conjunction with the Australian Government Department of Health, collaborated on a campaign to get people to make one simple change – add a handful of veggies to one of their daily meals or snacks.

The *Add an extra handful of veggies* campaign ran from 24 January to 20 February 2021 on OOH signs nationwide, reaching over 9.4M people.

PICTURED BELOW
ADD AN EXTRA HANDFUL OF VEGGIES,
AUSTRALIAN GOVERNMENT DEPARTMENT
OF HEALTH & OUTDOOR MEDIA ASSOCIATION

59%

of people who remembered the campaign or similar advertisements were parents

86%

of parents were encouraged to include veggies in their meals

80%

of parents were encouraged to make healthier choices for their children's meals

Source: 2021 Dynata survey commissioned by the OMA, n=1,200; parents with children under 15 n=775



NATIONAL HEALTH AND WELLBEING POLICY

"It is expected this initiative involving donated advertising space will reach up to 12 million Australians. I congratulate members of the Outdoor Media Association for utilising their signs to make a positive difference to the health of Australians – including children returning to school – across the country." The Hon Greg Hunt MP, Minister for Health.

One message is clear: addressing health and obesity requires a systematic focus on reducing social and economic disadvantage, as well as wide-ranging regulatory and other responses.

In 2020, the Australian Outdoor advertising industry created a world-first, national policy that restricts the placement of discretionary food and drink advertising around schools.

As part of the policy, the industry committed \$3M of advertising space across Australia every year to run targeted advertising campaigns supporting healthy diet and lifestyle choices.

Since the policy came into effect in July 2020, the feedback from government, industry and community has been overwhelmingly supportive.

In the first year of the policy's operation, the OMA reviewed nine advertisements for compliance with the policy. We surmise that this low number indicates how well understood the policy was by members. Of those nine advertisements, four were rejected from running on OMA member signs.

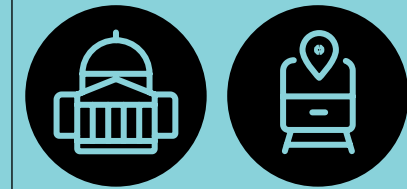
In addition, the OMA trained over 140 people in the application of the policy. Training attendees were from OMA member organisations, agencies and other interested groups.

- 9 advertisements reviewed
- 4 rejected from display
- 3 breaches
- 140 people trained

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 11,300* schools are now mapped across NSW, QLD, SA, VIC and WA.

*Previously reported figures differ due to enhancements in how schools are mapped and counted.



SUBMISSIONS TO GOVERNMENT

The OMA regularly advocates on behalf of its members to the Australian federal, state and local governments on issues that affect the industry and the community. Issues can range from amendments to planning frameworks to promotion of healthy habits and lifestyles.

In 2021, the OMA prepared submissions for the following:

- National Preventative Health Strategy
- Standard Instrument – Proposed Employment Zones Framework
- Transport for NSW – Road Safety Action Plan 2026
- Brisbane City Council Advertising Law Review
- Townsville Council Review of Advertising Devices Code

1 IN 4

Almost 1 in 4** Australian children are overweight or obese

35%

of children living in the most disadvantaged areas are overweight or obese

31%

A healthy diet is unaffordable for low-income families, costing up to 31 per cent*** of their disposable income

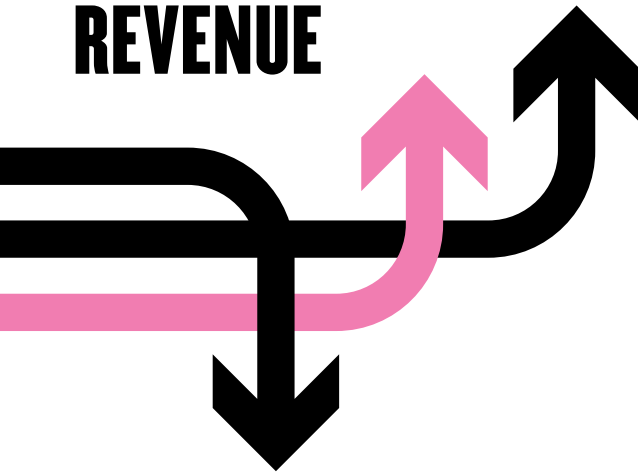
**Source: Australian Government, Australian Institute of Health and Welfare (2017); "A picture of overweight and obesity in Australia," available at aihw.gov.au
***Source: The Australian Prevention Partnership Centre (2017); "Are healthy diets really more expensive?" available at preventioncentre.org.au



07

PERFORM

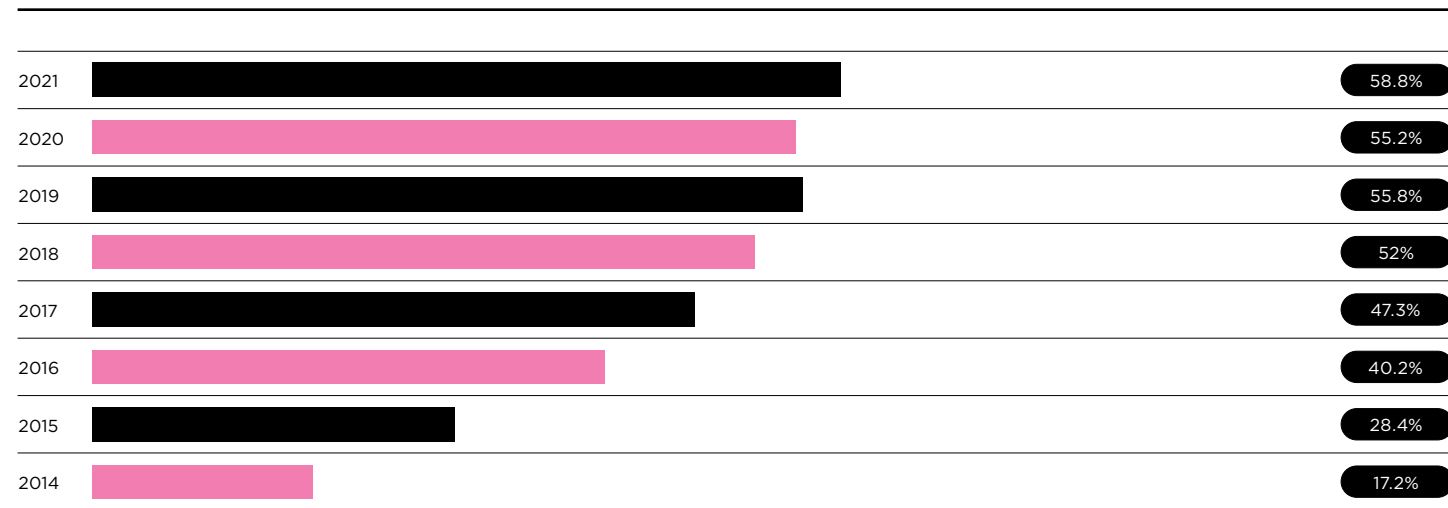
REVENUE



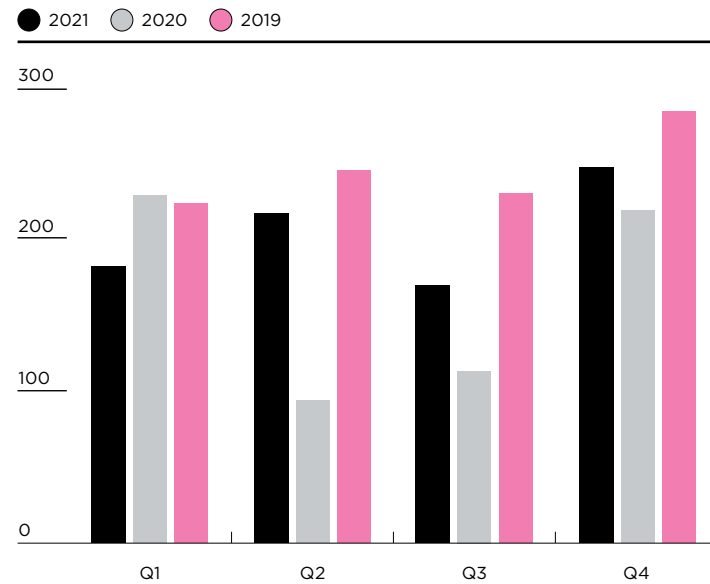
Following a tough year for the industry, we were glad to see revenue stabilise despite ongoing pandemic lockdowns. Total net media revenue for the year was \$812.7M. This result represents a 24 per cent increase on the prior year's revenue of \$655.2M.

Agencies and advertisers continued to embrace the impact and dynamic potential of Digital OOH to engage their customers. This year DOOH increased its slice of the revenue pie to 58.8 per cent from last year's result of 55.2 per cent.

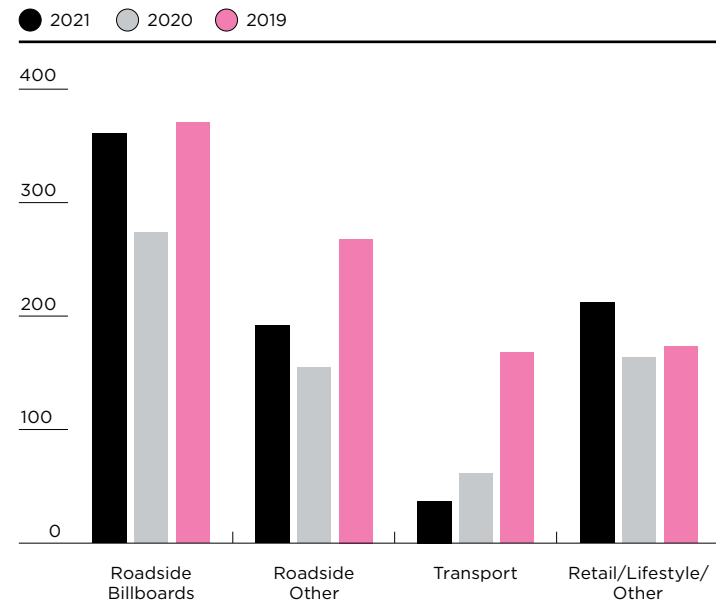
DIGITAL OUT OF HOME AS A PERCENTAGE OF TOTAL OUT OF HOME REVENUE



OUT OF HOME PERFORMANCE BY QUARTER

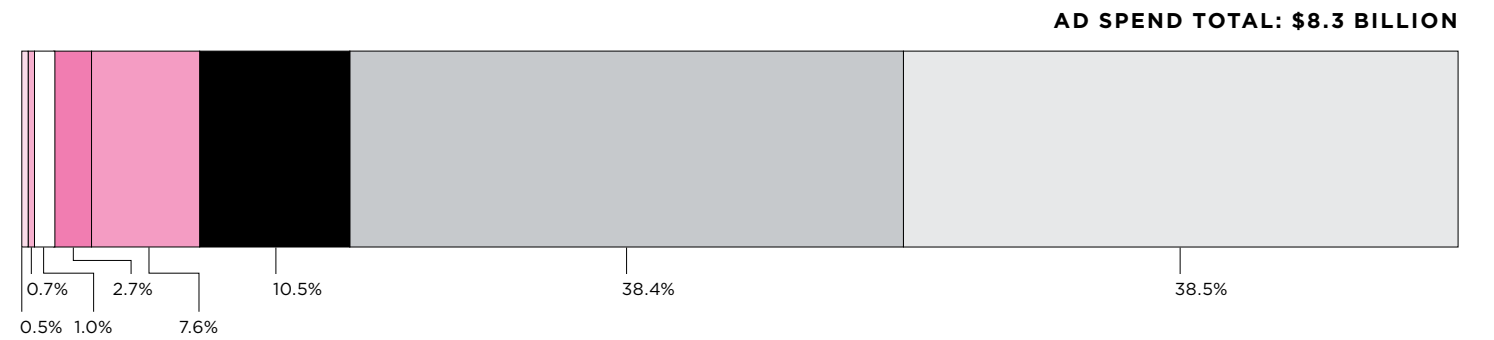


OUT OF HOME REVENUE BY CATEGORY (\$M) 2019-2021



2021 AD SHARES BY MEDIA TYPE

Legend: Cinema, Magazines, Other, Newspapers, Radio, Outdoor, Digital, Television



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.

TOP ADVERTISING CATEGORIES

CATEGORY	2021 RANK	2020 RANK	OUT OF HOME (\$000'S)	ALL MEDIA (\$000'S)
Retail	1	1	\$125,929	\$2,325,286
Communications	2	3	\$78,276	\$1,002,644
Finance	3	2	\$74,415	\$733,066
Government	4	5	\$53,281	\$329,980
Motor Vehicles	5	4	\$52,595	\$658,112
Entertainment & Leisure	6	8	\$49,030	\$535,713
Media	7	10	\$47,136	\$294,751
Food	8	7	\$43,260	\$366,892
Beverages-Alcoholic	9	6	\$41,971	\$127,121
Travel / Accommodation	10	9	\$38,551	\$363,664

TOP ADVERTISERS

ADVERTISER	2021 RANK	2020 RANK	OUT OF HOME (\$000'S)	ALL MEDIA (\$000'S)
Stan Entertainment	1	1	\$20,919	\$58,928
Commonwealth Bank	2	2	\$12,610	\$40,970
Streamotion	3	20	\$11,140	\$52,240
McDonald's Restaurants	4	4	\$11,064	\$92,720
Amazon.com	5	3	\$10,004	\$72,035
Lion	6	7	\$9,386	\$24,649
NRMA Insurance	7	11	\$8,195	\$39,139
Telstra Corporation	8	9	\$7,953	\$69,622
Foxtel	9	40	\$7,632	\$39,496
Woolworths Supermarkets	10	5	\$7,439	\$90,558

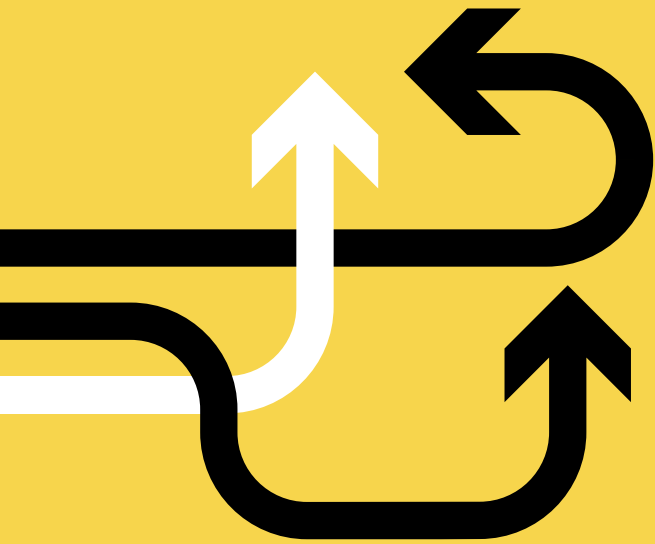
Source: Nielsen Ad Intel 2022. Nielsen reserves the right to adjust spend estimates and associated ranking retrospectively. Spend estimates are for Jan-Dec 2021.



SYDNEY GAY AND LESBIAN MARDI GRAS, MARDI GRAS PARADE



THANK YOU



The OMA and its members are a smart and eager bunch. The Outdoor story is a collective effort of dedicated staff, passionate committees, cooperative suppliers, and a growing chorus of OOH evangelists. We thank and appreciate everyone who regularly comes together to offer their time, skills and knowledge for the benefit of our industry.

GROW TOGETHER



“The industry is successfully collaborating on the build of MOVE 2.0 which will make it a world-class system.”

—
ADAM LANG

Independent Chair, MOVE 2.0 Delivery Group



Finance Committee

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- Daniella Natoli, oOh!media

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- Emily Sak, Shopper
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- Steve O'Connor
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- Jemima Southgate
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- Christian Zavec

MOVE 2.0 Advisory Group

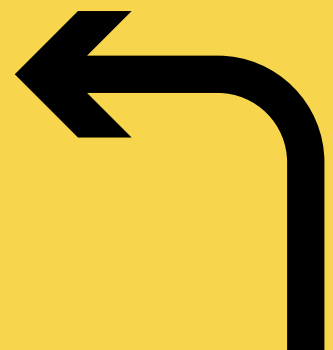
- Mike Porter (Independent Chair)
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- Craig Cooper, Carat
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- Andrew Morrill, Initiative
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- Steve O'Connor, JCDecaux
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- Phil Oneile, Village Roadshow Group
- Charles Parry-Okeden, OMA
- Mike Porter, MOVE 2.0
- Michael Prendergast, VMO
- Simon Reid, Initiative

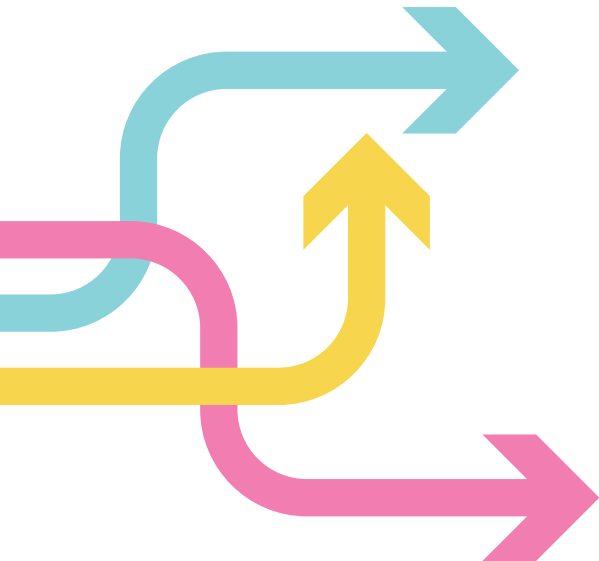
- Remi Roques, Broadsign
- Adele Rose, JCDecaux
- Emily Sak, Shopper
- Cristina Smart, JCDecaux
- Richard Smith, Hearts & Science
- Sue Squillace, Carat
- Sam Tedesco, Mediacom
- Nick Thomas, Mediacom
- Nicola Tracey, Diageo
- Clare Tsubono, Lion
- Adrian Venditti, QMS Media
- Liz Wigmore, Foundation
- Simone Wylie, News Corporation

MOVE 2.0 Delivery Group

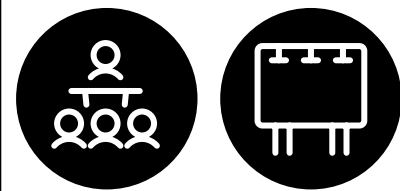
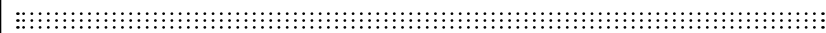
- Adam Lang (Independent Chair)
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- Jamie Cook, Veitch Lister Consulting
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- Simon Wake, Ipsos
- Christian Zavec, QMS Media



MEMBERS



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



OMA MEMBERSHIP

OMA members run dynamic, innovative and responsible businesses. Their networks of OOH signs connect people with brands. An application for membership requires approval from the OMA's Board of Directors.

This year, the OMA grew its membership base by 10 which sees us represent close to 100 per cent of the Outdoor industry in Australia.

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, cafes, light rail, office buildings and lifts, pedestrian bridges, railway stations, shopping centres, on street furniture (bus, tram, light rail shelters), trams, and universities.

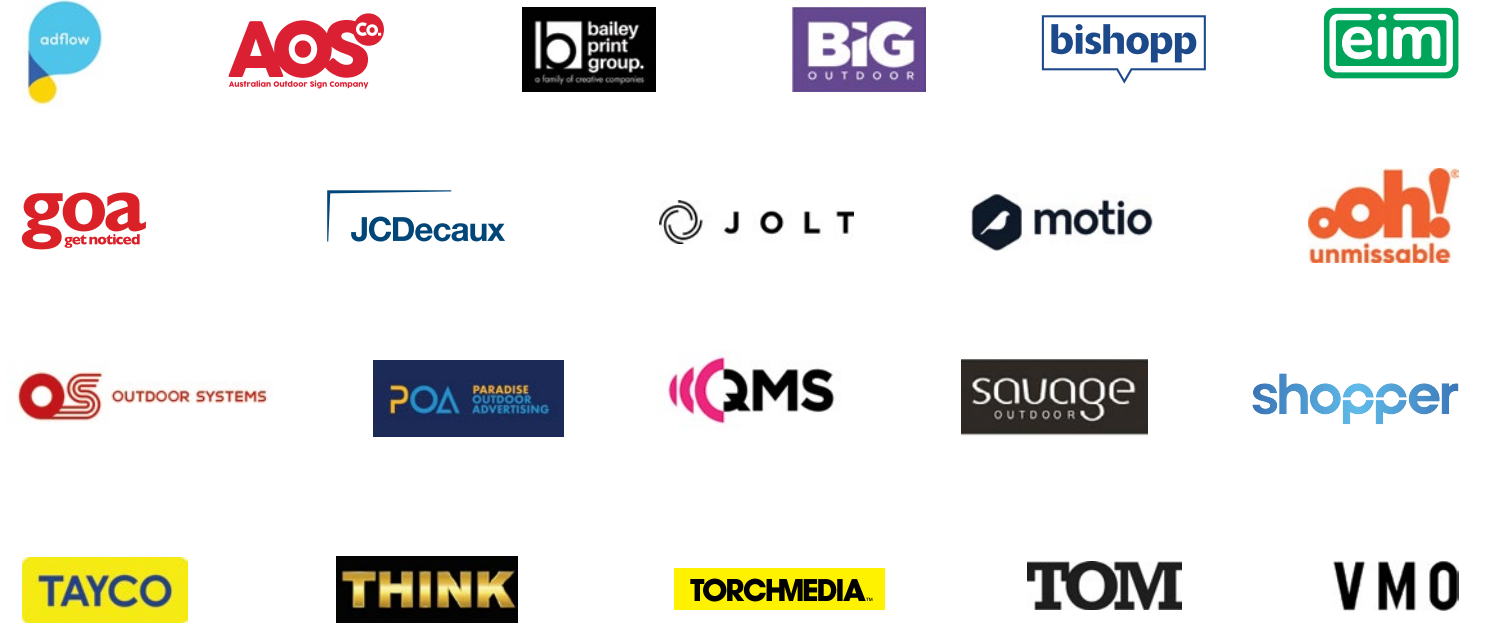
Non-media display members are businesses that provide goods and services to the OOH industry.

Asset owners own the property where OOH advertising stands.

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



MEDIA DISPLAY MEMBERS



NON-MEDIA DISPLAY MEMBERS



ASSET OWNERS



BENEFICIARIES

The arts, sports, government and charitable groups supported by the OOH industry in 2021.

- Academy of Music and Performing Arts
- Act for Kids
- AEIOU Foundation
- AFP Missing Persons Week
- Airlie Beach Festival of Music
- Anywhere Theatre Festival
- ANZ Breast Cancer Trials Group
- Australian Children's Music Foundation
- Australian Performing Arts Grammar School
- Australian Red Cross Lifeblood
- B&T Women in Media Awards
- Batyr
- Bella's Footprints
- Beyond Blue
- Blue Ribbon Foundation
- Boys Do Cry
- Braille House
- Brisbane Writers Festival
- Bundaberg Show
- By Charlie Ryan
- Cancer Council Australia
- CanTeen
- Catherine Hamlin Fistula Foundation
- Cerebral Palsy Alliance
- Charles Darwin University
- Charlie Teo Foundation
- Childhood Cancer Support
- Children's Hospital Foundation
- Children's Hospital Westmead
- Children's Tumour Foundation of Australia
- Clean Up Australia
- Cool Australia
- Cure Cancer Australia Foundation
- Curtin University
- Developing Links
- Dolly's Dream
- Domestic Violence Prevention Centre Gold Coast
- Earth Hour
- Edith Cowan University
- Fitzroy Frogs Triathlon (FOC Digital)
- Flinders University
- Fluidform Pilates
- Foodbank Queensland
- FRAXA Research Foundation
- Fuel for Schools
- Garvan Institute of Medical Research
- Gift of Bread
- Glaucoma Australia
- GO Foundation
- Haemochromatosis Australia
- HeartKids Australia
- Henley Arch
- Humanise Health
- Humpty Dumpty Foundation
- Hurley Hotel Group
- International College of Management, Sydney
- International Paralympic Committee
- It's Bloke Thing Foundation
- Jean Hailes for Women's Health
- JMC Academy
- Kelsian Group
- Koala Kids Foundation
- Landcare Australia
- Leukaemia Foundation of Australia
- Leukemia Foundation
- LifeFlight Australia
- Lifeline
- Lion's Share Fund
- Lord Somers Camp and Power House
- Make-A-Wish Foundation
- Malaria No More Fund
- Marine Rescue New South Wales
- Mark Hughes Foundation
- Mike Carney Toyota
- Missing School
- MOOD Tea
- Movember Foundation
- NAIDOC Week
- National Gallery of Australia
- North Queensland Football
- Northern Rays
- One Girl Australia
- Orange Sky Australia
- Ovarian Cancer Australia
- Oxfam Australia
- Palliative Care Australia
- Perry Cross Spinal Research Foundation
- Pink Hope
- Polished Man
- Pretty Foundation
- R U OK?
- Rare Cancers Australia
- Reconciliation Australia
- Redstar Training Centre
- Restart a Heart Day
- Ride 4 Lives
- Robert Connor Dawes Foundation
- Ronald McDonald House Charities
- Royal Brisbane and Women's Hospital
- RSPCA Australia
- Rugby Australia
- Rural Aid
- SAE Institute
- Scout Association of Australia, Queensland
- SecondBite
- Shake It Up Foundation
- Stand Tall for PTS
- Starlight Children's Foundation
- Stay Kind
- Sydney Children's Hospital Foundation
- Sydney Gay and Lesbian Mardi Gras
- Sydney Women's Fund
- Taronga Conservation Society Australia
- Tender Loving Care Disability Services
- The Be Centre Foundation
- The Big Issue
- The Butterfly Foundation
- The Kids' Cancer Project
- The Pyjama Foundation
- Tour de Cure
- Townsville Grammar School
- Tunstall Healthcare
- Two Good Co
- Umbrella Studio
- UN Women Australia
- UNICEF Australia
- Uniting NSW.ACT
- University of Tasmania
- University of Western Australia
- UnLtd
- Variety Australia
- Visit Victoria
- Westpac Rescue Helicopter Service
- White Ribbon Australia
- Whitelion
- WomenCAN Australia
- World Wildlife Fund Australia
- Youth Off The Streets

Government

- Aboriginal Health Council of Western Australia
- Australian Federal Police
- Australian Government
- Australian Museum
- Banyule City Council
- Black Dog Institute
- Brisbane City Council
- City of Melbourne
- City of Monash
- City of Port Phillip
- City of Stonnington
- City of Sydney
- Department of Health New South Wales
- Department of International Trade
- Inner West Council
- Institute for Urban Indigenous Health
- Mildura Regional Development
- New South Wales Government
- North Sydney Council
- Queensland Government
- Randwick City Council
- Victoria Government
- WayAhead Mental Health Association NSW
- Willoughby City Council

PICTURED OPPOSITE
BIG LOVE FOR MUM, BIG OUTDOOR





“IT’S BETTER TO HAVE A GREAT TEAM THAN A TEAM OF GREATS.”

SIMON SINEK

This report is available at oma.org.au
All photographs Outdoor Media Association and its members
Publisher: Outdoor Media Association
ISSN - 1839 - 0315 (print)
ISSN - 1839 - 0323 (online)



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