





Contents

1
Celebrating
unity
p. 2 - 5

2
Representing
our members
p. 6 - 9

3
Reaching mass
audiences
p. 10 - 11

4
Leadership
p. 12 - 19

5
Growing with
strong
communities
p. 20 - 23

6
Big, bold and
bright
p. 24 - 27

7
Innovative
solutions
p. 28 - 31

8
Setting the bar
high
p. 33 - 37

9
Going strong
p. 38 - 43

10
Teamwork
p. 44 - 49

11
OMA Members
p. 50 - 53

12
Beneficiaries
p. 54 - 55



CELEBRATING EIGHTY YEARS OF LOOKING UP

1

Celebrating 80 years of unity

In 2019 the Outdoor Media Association (OMA) celebrated 80 years of unity, innovation and growth. Here are some of the highlights for the year.



The industry comes together

In August 1939, a small group of Out of Home (OOH) vendors united to form the first peak outdoor advertising industry body, the Outdoor Advertising Association of Australia (OAAA).

Since then, the Outdoor Media Association (OMA), as it is now known, has grown to represent a diverse group of companies and today covers 80 per cent of the OOH industry. Every day, the network of signs the OMA's members operate help advertisers reach 93 per cent of the Australian population living in and around the capital cities.



“The OMD Brisbane team really embraced the OMA’s *Look Up* campaign message and are all making more of a conscious effort to look up!”

OMD Australia, LinkedIn post



An agile, fast growing network

This year, the new platform CORE, (Centralised Outdoor Response Engine), which was developed to make it easier to buy and sell OOH, was tested with its users, media agency buyers and strategists. CORE will be launched in 2020 and will enable agency users and clients to brief campaigns across all OOH suppliers and formats nationwide. (p. 8)

The industry’s audience measurement system, MOVE, the Measurement of Outdoor Visibility and Exposure, tracks OOH audiences against population growth each year. In 2019 OOH audiences increased by 2.4 per cent, broadcasting to 13M people each day in the major capital cities of Australia and outstripping population growth of 1.5 per cent. This marks nine consecutive years of audience growth for OOH signs since MOVE was launched in 2010.

The MOVE Board invested \$1.3M in a Neuroscience Project Study (NPS), the largest investment of this kind in Australia. The NPS will investigate how people engage with digital advertising signs in the outdoor space and how that influences consumer behaviour.

Additionally, the industry committed up to \$10M to rejuvenate MOVE to more accurately measure audiences for digital signs. A tender to build the system was advertised to a selected list of proponents. An announcement of the successful tenderer will be made in 2020. (p. 11)



Looking up and out into the world

The OOH industry joined forces to bring the largest ever Outdoor campaign, *Look Up*, to signs nationwide, reaching over 12M people with a simple but important message – Look Up. The campaign invited Australians to Look Up and out to experience the life changing benefits of connecting with the world around them and each other.

In conjunction with the campaign, the industry released a report *The Art and Science of Looking Up* featuring the research of renowned neuroscientist Dr Fiona Kerr.

Dr Kerr’s research investigates how an array of important physical, psychological, and social benefits are derived by simply looking up and out. The simple human act of looking up can improve our memory, hone our intuition, allow us to focus and pay attention, as well as increase our awareness and ability to gain insights from the world around us.

As part of the *Look Up* campaign, a series of breakfasts were hosted in Melbourne, Brisbane and Sydney featuring neuroscientist Dr Fiona Kerr in discussion with a panel of media experts on the efficacy of Outdoor advertising. (p.20)



Making our world safer

Given the fast-changing nature of the world and the introduction of digital signs to the road network, the industry has been quick to commission research on the safety of its signs.

The Australian Road Research Board (ARRB) was commissioned to look at digital signs placed at intersections to gauge the reaction of drivers to these signs.

The research found that the signs impacted driver behaviour by showing an improvement in driver performance.

To further this research, the OMA brought together road authorities from around the nation to discuss how to best collaborate on a research project that measures driver behaviour in the presence of digital billboards in a real world environment. At this meeting the various road authorities agreed to a world first collaborative research project, with the OMA, to investigate crash data around digital signs, before and after they were constructed.

Professor Simon Washington, CEO of Advanced Mobility Analytics, and Associate Professor Paul Roberts, Deputy Director of the Western Australian Centre for Road Safety Research, were commissioned to write the methodology for this joint research project. (p. 23)

Out of Home signs give back

The industry is a valuable contributor to the Australian economy with an estimated 50 per cent of its revenue returned to governments and landlords in rent and taxes. The industry continues to build and maintain over 17,000 items of community infrastructure such as bus shelters, kiosks, park benches, WiFi stations, and pedestrian bridges valued at \$352M.

This year, the OOH industry donated \$87M in free advertising space and media services to more than 230 not-for-profit organisations including arts, sports, and charities across the country, an increase of 25 per cent from \$69M in 2018. (p. 21) (p. 54-55)

The partnership with National Missing Persons Week (NMPW) entered its eleventh year in 2019 with a campaign valued at \$2.2M that reached 10.5M Australians over a one-week period. This brings the total value of advertising space donated to NMPW over the last four years to \$5M.

Following the success of the 2018 campaign with DrinkWise, *Children can inherit more than your looks*, a campaign valued at \$1.3M was once again donated. This campaign, which reached 11M people, encouraged parents to role model sensible alcohol consumption to their children. In the past two years OMA members have donated advertising space valued at \$5M to the partnership with DrinkWise. (p. 22)

Ten years of growth

Net media revenue increased 1.5 per cent to hit a high of \$935.5M. Digital OOH continued to drive this growth trajectory, with 55.8 per cent of revenue attributed to digital signs. (p. 38)





2

80 years of representing our members

Out of Home (OOH) is advertising that reaches audiences outside of the home on a variety of formats, including billboards, bus shelters, public transport, shopping centres and office buildings.

Outdoor Media Association

The Outdoor Media Association (OMA) is the peak industry body that represents companies that display advertisements, own signs, and provide services to the OOH industry. OMA members represent approximately 80 per cent of the OOH revenue generated in Australia.

The OMA is the leading voice on OOH advertising in Australia building constructive relationship with all its stakeholders. The OMA's mission is to build a more sustainable industry for its members, by promoting and showcasing the efficacy of Outdoor advertising.

The OMA's activities span four core functions: audience measurement and data management; marketing and communications, government relations; and member services including delivering policy, advisory and training programs.

OOH advertising is always on delivering messages 24/7. It is ubiquitous, innovative, entertaining and effective. It invites you to look up and engage with your surroundings and communities.

Governance

The OMA is governed by a Board of Directors who are elected by its membership. The Board met four times in 2019.

It is compulsory for OMA members to sign up to the industry's Code of Ethics. The Code of Ethics mandates members to adhere to 17 self-regulatory codes that govern how Outdoor advertisements are displayed.

The OMA operates nationally and, prior to July 2005, traded as the Outdoor Advertising Association of Australia (OAAA). It was first incorporated on 1 August 1939.

Measurement of Outdoor Visibility and Exposure (MOVE)

Measurement of Outdoor Visibility and Exposure (MOVE) is an online platform that simplifies the planning and buying of OOH advertising by producing audience measurement results across Australia's five capital city markets. MOVE measures all OOH advertising formats, across a variety of environments, including airports, railway stations and concourses; across the spectrum of public transport, bus/train/tram/light rail internal and external signs; on the roadside; in office buildings, cafes, shopping centres and universities.

In 2019, MOVE was accessed monthly by 650 users who used the platform to determine potential audiences for individual signs, combinations of OOH formats and tailored packages.

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

Governance

MOVE is owned by a group of shareholders who appoint the Board of Directors. The MOVE Board met four times in 2019.

OOH companies measured by MOVE

- ODNA (now BIG Outdoor)
- Bishopp Outdoor Advertising
- goa
- JCDecaux
- oOh!media
- Outdoor Systems
- QMS Media
- TorchMedia



Who uses MOVE

Since its launch in 2010, MOVE has become an essential tool for advertisers, media planners, buyers, and strategists. Users of MOVE increased in 2019 with 1,074 users logging into the platform a total of 18,555 times, an increase of 15 per cent on 2018. In addition, 404 individuals from member organisations logged in 30,884 times, an increase of 10 per cent on 2018.

Training

MOVE runs a national training program throughout the year in Adelaide, Brisbane, Melbourne, and Sydney. In 2019, a total of 403 people attended training: 291 people from media agencies attended software training; 88 attendees were from the OMA membership and attended site classification training; and 24 attendees were agency staff and OMA members who attended methodology training. This is an increase of 18 per cent on 2018.

Centralised Outdoor Response Engine (CORE)

CORE (Centralised Outdoor Response Engine), which is in development, is the industry's new automation tool to make it easier to buy and sell OOH across all formats and suppliers nationwide.

In 2019 CORE was tested with selected users from media agencies. CORE will be launched in 2020 and will enable agency users and clients to manage OOH campaign planning and communications in one central location. This will save time by streamlining the briefing, buying and selling process.



3

80 years of reaching mass audiences

Measurement of Outdoor Visibility and Exposure (MOVE) continues to evolve and incorporate new data and functionality, providing accurate audience measurement for Out of Home (OOH).

How MOVE works

The MOVE platform was launched in 2010 following five years of comprehensive research and testing. Since then, MOVE has significantly improved how OOH signs are measured and has been instrumental in the growth of the industry.

MOVE simplifies the planning and buying of OOH by producing audience measurement results for any combination of OOH signs or tailored packages. As well as providing results numerically, an inbuilt mapping function visually displays the reach of a campaign against the chosen demographics and markets.

MOVE enhances the standard measurement of target audiences' Opportunity To See (OTS) by reporting the active

audiences through Likelihood To See (LTS). LTS is a quantitative measurement that enables MOVE to account for audience interaction. It assesses the actual audience rather than the potential audience, which means that OOH campaigns can be bought with greater assurance that advertiser messages are hitting the mark. LTS accounts for a number of visibility factors, including different modes of transport, the speed in which people are travelling and where they are seeing the sign from, as well as the size of the sign and how it is illuminated.

MOVE measures 77,500 signs across Australia's major capital cities: Adelaide, Brisbane, Melbourne, Perth and Sydney.

Ensuring brand safety

Incorporated into the MOVE platform is a School Mapping Tool, which ensures that the industry complies with its policy prohibiting products that are illegal for purchase by minors being advertised within a 150m sightline of primary or secondary schools.

The School Mapping Tool accurately maps the locations and boundaries of 41,390 schools across NSW, QLD, SA, VIC and WA, to ensure that both the OOH industry and advertisers comply with the OMA's Placement Policy.

MOVE data update

For the ninth consecutive year since the launch of MOVE, OOH audiences have increased to reach 13M people every day, taking 57M trips across the five major markets. In 2019 MOVE's data update showed that OOH audiences increased 2.4 per cent compared to population growth of 1.5 per cent.

The MOVE data update includes additions of new signs and changes to existing signs as well as updates to:

- population and travel zone data drawn from the 2016 Australian Bureau of Statistics (ABS) census
- new and/or improvements to shopping centres, schools and airports
- road network and transport information including public transport routes and timetables.

Digital measurement

Over the last ten years, the OOH industry has invested hundreds of millions of dollars to build a dynamic network of digital signs that is responsive, flexible, and effective. The digitisation of the OOH channel has necessitated that a new metric be developed to more accurately measure audiences for Digital OOH.

The MOVE Board invested \$1.3M in a Neuroscience Project Study (NPS), the largest investment of this kind in Australia. The NPS will investigate how people see advertising signs in the outdoor space and how that influences 'ad recall' and subsequently people's purchasing decision.

Additionally, the industry committed up to \$10M to rejuvenate MOVE, the industry's audience measurement system, to more accurately measure audiences for digital signs. A tender to build the system was advertised to a selected list of proponents. The successful tenderer will be announced in 2020.

"I have been working globally for many years across the various media channels investigating the role of long-term memory encoding and emotional intensity in driving advertising effectiveness. A major study like this [OMA Neuroscience Project Study] will provide undeniable proof about how both traditional and digital signs impact on audiences. Neuroscience is particularly suited to give us answers, tapping into the subconscious and capturing audience response to stimulus during the window of exposure."

Peter Pynta, CEO-APAC, **Neuro-Insight**, the research firm undertaking the NPS





4

Leadership



Chairman's Message

80 years and still strong

For the first time in the Association's 80-year history its members appointed an independent Chairman to the OMA and MOVE Boards. I am proud to have that honour bestowed on me.

Sadly, I write this at the time of the COVID-19 global pandemic. The current necessary steps taken by governments around the world to stop the spread of the deadly corona virus are having a catastrophic economic impact, the likes of which have not been seen for many decades.

Physical distancing, self-isolation and travel restrictions have put the Out of Home (OOH) sector at the forefront of disruption within the media industry. The devastating impact on our members' businesses will play out in the months to come.

It makes it difficult to look back on what is now a halcyon period, when the industry grew exponentially following the global financial crisis in 2009. Annual reports are meant to document a specific period in time, so while COVID-19 is what is happening to us in 2020, I will step back and look at the year that was 2019.

Consolidation and transformation

We forged a new path, following the industry's consolidation in 2018, by re-setting the OMA and MOVE Boards and focusing on key industry outcomes with renewed collaboration and enthusiasm.

We truly transformed into a digital channel in 2019, with our digital networks contributing to more than 50 per cent of our industry revenues. This, coupled with our growing audiences, made OOH a media channel that can't be ignored by advertisers.

As the urbanisation of our cities continues and populations grow, the capability of our digital signs to deliver contextually relevant messages with impact is supercharged. The 2019 MOVE data update showed OOH audiences increased 2.4 per cent to reach 13M people, surpassing population growth of 1.5 per cent. This marks the ninth consecutive year that OOH audiences have increased, amounting to cumulative growth of 29 per cent, exceeding population growth of 18.8 per cent.

Sustainable growth

The slowing down of the economy made 2019 a challenging year for the Australian advertising industry overall. However, OOH continued its upward trajectory, one of the only traditional media channels to do so, growing 1.5 per cent posting \$935.5M total net media revenue.

A major contributor to our ten years of growth has been the digitisation of our signs. Digital signs now account for 55.8 per cent of our revenue.

We continue to invest in digital technologies and research, we committed up to \$10M to rejuvenate and expand MOVE, the industry's audience measurement system, to more accurately measure audiences for digital signs.

Additionally, the industry invested \$1.3M in a Neuroscience Project Study (NPS), the largest investment of this kind in Australia. The NPS will investigate the relationship between memory encoding and advertising recall.

Doing our part

The introduction of more digital billboards across our road networks has seen the industry commission research on the safety of its signs.

The Australian Road Research Board (ARRB) were commissioned to investigate driver behaviour in the presence of digital signs at intersections. The research found that drivers were impacted in a way that improved performance.

As a result of this ground-breaking research, the OMA brought together road authorities to collaborate on a national research project on driving behaviour using crash data around digital signs.

Thank you

I am proud of how far we have come as industry. We are mature and unified, and we are poised for further investment and growth. We are committed to delivering advertising messages to 93 per cent of the population every day, making OOH the number one 'always on' advertising space.

My thanks to the OMA and MOVE Boards and the team for making 2019 an exceptional year for the industry.

Charles Parry-Okeden
Chairman, OMA and MOVE



CEO's Message

80 years of Looking Up

Eighty years ago, a small group of Out of Home (OOH) vendors had a vision to unite the industry under one representative body and on 1 August 1939 they formed the Outdoor Advertising Association of Australia (OAAA). Fast-forward to today, the Outdoor Media Association (OMA) is leading the industry: setting the agenda for self-regulation, driving innovation in audience measurement, and working to create a sustainable industry for members and the community.

Daring and original

One of our values is to make our industry "one worth following" and in 2019 we undertook several initiatives to remain true to that value.

We captured something that is on everyone's mind with our largest ever industry campaign *Look Up*. We are all concerned about the impact of technology on our lives. We wanted to do something about this, especially in our beautiful outdoor spaces, where people traverse with their eyes down and their ears blocked.

We found an inspirational neuroscientist based in Adelaide, Dr Fiona Kerr, whose research shows that simply looking up can make us more connected, help us solve problems, grow new brain, and positively impact how we live together.

The *Look Up* campaign launched in January and reached over 12M people with a simple message. When you Look Up not only do you see lots of things, including signs, brands and the world around you, but it helps your brain grow and make new connections. The results (see page 20) speak for themselves.

Innovative and dynamic

As a future driven industry, we pursue innovation and prioritise investment in new technologies. This year we

tested our latest technology platform CORE (Centralised Outdoor Response Engine), which promises to revolutionise the selling, buying and billing process for OOH. CORE will save time for planners and buyers of Outdoor signs by providing automated access to information across all formats, all operators and all inventory.

As our digital signs now represent almost 56 per cent of OOH revenue, we must update and future proof our current audience measurement system. To this end we will invest up to \$10M in the next two years, to build a new metric for digital measurement that will provide greater transparency around the value of OOH.

Giving back to the community

It is a privilege to be afforded the right to be cheeky, clever and sometimes controversial in the public space. We recognise our obligation to give back to the community. We do this through the provision of public infrastructure. Our members also generously donate media services and free advertising space to a variety of organisations.

We supported National Missing Persons Week (NMPW) for the eleventh year with a donation of \$2.2M in free advertising signs and media services. The campaign sought to humanise the people behind the statistics of missing people and reached 10.5M Australians.

We entered the second year of our partnership with DrinkWise, which saw the *Children inherit more than your looks* campaign run across our signs to inspire change in the way we consume alcohol around children. To date, OMA members have donated more than \$5M in media space to the partnership with DrinkWise.

In 2019 OMA members donated \$87M in free advertising and media services for use by not-for-profit and community groups including arts, sports and charities. This is in addition to maintaining close to 17,000 items of community infrastructure valued at \$352M including bus shelters, kiosks, park benches, and pedestrian bridges.

Exceeding expectations

As an ally in the public space, we continue to work with our closest partner, government, to ensure that we are operating within the framework of sensible and proportionate evidence-based regulation that avoids unintended consequences.

Despite some challenging conditions in our industry and globally, we are optimistic about the future, proud of our community commitments, and excited about continuing to work together to engage, excite and inspire. Thank you for being an essential part of our ever-evolving landscape.

Charmaine Moldrich
CEO, OMA and MOVE



OMA and MOVE board of directors



Brendon Cook
OOH!MEDIA

Brendon Cook founded oOh!media in 1989. With over 41 years' experience in outdoor advertising, Brendon has been at the forefront of the Out of Home advertising business and helped pioneer the industry's move into digital. Brendon led the acquisition of Adshel in 2018 and is now responsible for over 850 employees spread across offices in all capital cities in Australia and New Zealand to help advertisers deliver powerful integrated campaigns across audience-led advertising solutions. Brendon has been a Director of the OMA and MOVE since 2003.

Charles Parry-Okeden, Chairman
EXECUTIVE CHANNEL HOLDINGS

Charles has over 25 years of media experience across radio and Out of Home advertising. His entrepreneurial spirit saw him co-found Executive Channel (ECN) and establish a highly successful B2B business with the launch of Australian Media Channel Pty Ltd. Charles joined as the Chairman of the OMA and MOVE in 2019.



Kirsty Dollisson
TORCHMEDIA

Kirsty has 23 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 & Marketing Committee and has been a Director of the OMA since 2017.



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 started at Cody Outdoor and he was later the Chief Financial Officer of Media Ltd. 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.



John O'Neill
QMS MEDIA

John has over 24 years of experience in the Out of Home industry developing and leading sales teams at QMS Media, EyeCorp, Media Puzzle and oOh!media. As CEO of QMS Media, John is instrumental to the business's strong growth and performance as he leads and manages the multi-platform Australian media business. John has been a Director of the OMA and MOVE since 2018.



Andrew Tyquin
OUTDOOR SYSTEMS

Andrew has more than 23 years of experience in the Out of Home industry. He has worked extensively across media sales, operations, acquisitions and development and has a proven record in delivering growth by creating and implementing commercial strategies. Andrew joined the OMA Board in 2019.



Max Eburne
JCDECAUX

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



Steve O'Connor
JCDECAUX

Steve has over 29 years of experience in the Out of Home industry having started as Sales Manager with Buspak in 1990, promoted to Sales Director in 1993 and then appointed CEO of Buspak Hong Kong three years later. Steve returned to Australia in 1998 to become CEO for Buspak Australia and New Zealand. During his six years in this role, Steve grew the organisation and established himself as a dynamic and leading force in the OOH industry. In 2004, Steve joined JCDecaux Australia as CEO and is currently responsible for more than 500 staff and a varied portfolio including street furniture, billboards, airports and transit advertising in Australia & New Zealand. Steve has been a Director of the OMA and MOVE since 2004.



David Scribner
OOH!MEDIA

David has more than 30 years of experience in the Out of Home, telecommunications and digital industry, and across some of Australia's leading brands. David joined oOh!media in 2018 as Chief Customer Officer, in charge of helping advertisers to engage with audiences more effectively. David was a longstanding board member of the AANA, and is the current Chairman of Ad Standards. David joined the MOVE Board in 2019.



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.



Noel Cook
OOH!MEDIA

Noel has close to 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. Noel joined the OMA Board in 2019.



Chris Bregenhoj
MOOH MEDIA
(resigned May 2019)

OMA and MOVE teams

Emma Carr
General Manager, Government Relations, OMA

Emma oversees the development of the strategy and management of government relations across federal, state and local governments. She has 18 years of experience in various communications and government relations roles across the private, public and charitable sectors. Emma joined the OMA in 2019.



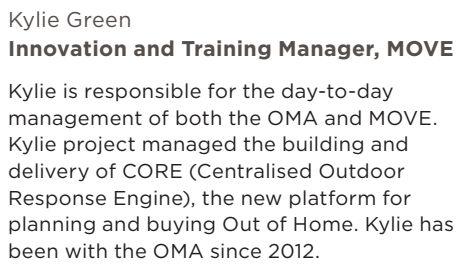
Charmaine Moldrich
CEO, OMA and MOVE

Charmaine has more than 30 years of experience in leadership, management, marketing, communications and business development across a variety of sectors including the arts, media, higher education, and government. Charmaine is uniquely positioned to lead industry growth in a rapidly-changing, technology driven world. Charmaine has been CEO of OMA and MOVE since 2010. Charmaine is a non-voting member and public officer on the OMA Board, and an appointed Director on the MOVE Board.



Kylie Green
Innovation and Training Manager, MOVE

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



Grant Guesdon
Digital Measurement Project Lead

Grant has over 14 years of experience in the planning and buying of media campaigns and 21 years of experience in Out of Home audience measurement. As the lead on the new digital measurement system, he oversees the development of the Out of Home industry's new digital audience measurement system being developed by the OMA. He has been with MOVE since 2009.



Julie Jensen
Marketing Director, OMA and MOVE

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

Ganjina Nozakova
Systems and Training Manager, MOVE

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



Alexandra Simpson
Communications Specialist—Government Relations, OMA

Alexandra develops communications to support the Government Relations team's strategy, implementation and execution of the OMA's negotiations and outreach with government, key stakeholders, and members. She has several years' experience working in communications for various businesses. Alexandra joined the OMA in 2019.



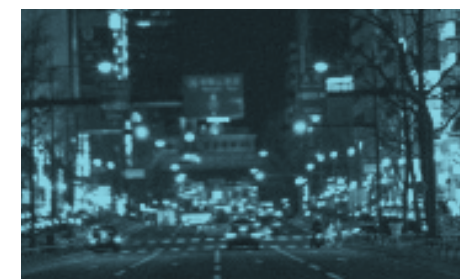
Emma Ward
Communications Manager, OMA

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



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 OOH. She has experience working at all levels of government, starting her career at a local council before working as a Policy Adviser at ClubsNSW, a NSW Government Minister's office, and Suicide Prevention Australia. Kirsten joined the OMA in 2019.



Justin Ko
Systems Operator, MOVE
(resigned February 2019)

Ti-Ahna Firth
Marketing Manager, OMA
(resigned April 2019)

Siobhan Marren
Senior Policy Advisor, OMA
(resigned September 2019)

Tess Phillips
General Manager, OMA
(resigned October 2019)

Louisa Howard
Marketing and Office Assistant, OMA
(resigned October 2019)





CASE STUDY

Look Up

In 2019 the Out of Home (OOH) industry united to bring the largest ever OOH campaign to Australia.

The *Look Up* campaign invited Australians to transform their brains, their bodies, and their lives through the simple act of looking up and out.

Look Up was based on research from world-renowned neural and systems complexity specialist Dr Fiona Kerr. Dr Kerr's research investigates how an array of important physical, psychological and social benefits are derived by looking up and out. By simply looking up we can improve our memory, hone our intuition, and increase our awareness and ability to gain insights from the world around us.

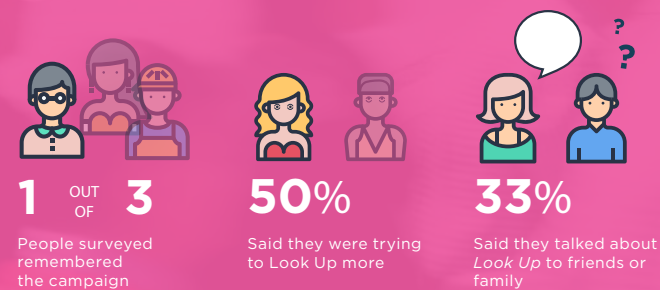
The *Look Up* campaign ran twice in 2019. Phase One ran for four weeks in January and February and Phase Two ran for eight weeks in July and August. The campaign was

seen by 92 per cent of the Australian population living in and around capital cities. Paid and organic search saw an increase of 10 times the average activity for the key words 'Look Up'.

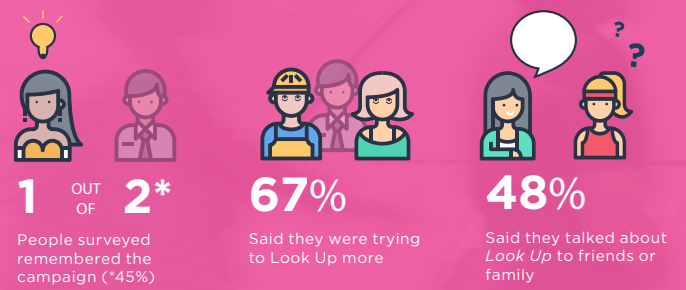
The OMA released two reports as part of the *Look Up* campaign; *The Art and Science of Looking Up* and *The Art and Science of Outdoor Media*.

A post-campaign survey from Phase One found that, of the one in three people who remembered the campaign, 50 per cent said they were making a conscious effort to Look Up more and 33 per cent said they had talked about it with a friend or family member. The post-campaign survey results improved following Phase Two; among the one in two people who remembered the campaign, 67 per cent said they were trying to Look Up more and 48 per cent said they had talked about *Look Up* with friends and family.

PHASE ONE



PHASE TWO



5

80 years of growing with strong communities

OMA members help to positively secure the future of Australia as a sustainable community, offering a network of signs, static and digital, to businesses, governments and organisations to advertise their goods and services and to provide essential public information. Out of Home (OOH) advertising plays an important role in the public domain.

Community commitment

The OOH industry plays an important role in the growth of strong, sustainable communities. With an estimated \$1 out of every \$2 of OOH revenue returned to government and landlords in rent and taxes, the industry contributes to the efficiencies of cities through an ongoing investment in Australia's public infrastructure and technology.

OMA members provide media and other services to a range of beneficiaries and companies across the country. OOH is also trusted to broadcast government and community awareness messages, including road safety, public health and community service campaigns. OOH advertising delivers essential communications services to the community and, in the case of digital OOH, in real-time.

This year, the industry donated media space and advertising production valued at an estimated \$87M and supported over 230 beneficiaries, including arts, sports and charitable organisations across the country.

Industry campaigns

The OMA unites the industry several times a year to focus on causes with national impact that showcase the power of OOH. Over and above the many individual campaigns for organisations that the industry supports, in 2019 the industry dug deep to also support three major campaigns.

"It seems counter-intuitive to our modern culture that looking up and out and seemingly doing nothing could be the most beneficial state for optimising our thinking, but in fact, this is our natural way of being or 'default' mode if we're not distracting our brains with technology or pushing it down the rabbit hole of trying to work on a specific task or problem."

Dr Fiona Kerr, Founder and CEO, **The NeuroTech Institute**

“Since 2015, the OMA and its members have been invaluable supporters of National Missing Persons Week. Almost \$6 million of Outdoor advertising has been donated to raise awareness of Australians in our community who remain missing. This enables the AFP to engage with the community on a scale it wouldn’t otherwise, in the hope of sparking renewed interest in missing persons cases, and as a result brings us one step closer to finding answers families of missing persons so desperately seek.”

Marina Simoncini, Manager ACCCE and NMPCC, **Australian Federal Police**

National Missing Persons Week

For eleven years the OOH industry has supported National Missing Persons Week (NMPW) in NSW and in the last five years in partnership with the Australian Federal Police (AFP).

In 2019, the industry donated \$2.2M in advertising space and media services in support of NMPW to bring the total value of the donation for the last four years to \$5M. Between 4-10 August, an estimated 10.5M people saw the campaign, which aimed to humanise the people behind the statistics.

Amber Alerts

This year, the OMA and its members announced an industry-wide partnership with Brisbane City Council (BCC) to pilot the delivery of Amber Alerts on OOH signs.

An amber alert is an important initiative that supports law enforcement in the urgent broadcasting and circulation of details about missing children or child abductions using digital signs. The OMA will continue to roll out this initiative to more cities in 2020.

DrinkWise

For the second year, the OOH industry partnered with DrinkWise to encourage Australian adults, who are the main influencers of their children’s behaviour, to role model sensible alcohol consumption. The industry donated \$1.3M in advertising space and services in support of the *Children can inherit more than your looks* campaign to bring the total investment to over \$5M over the two years.

Environment and sustainability

OMA members are committed to environmentally sustainable solutions, seeing them as beneficial for both the community and their businesses. Actions undertaken by the industry include:

- Programs to reduce waste generation, including paperless offices and producing lighter-weight materials for billboards skins. These have resulted in almost 40 per cent less PVC use in production and waste.
- Recycling or repurposing up to 90 per cent of street furniture posters and vinyl billboard skins.

- Introducing fully recyclable billboard material and monitoring the reduction in the generation of waste, including recycling programs for OOH advertising skins.
- Investing in lighting systems with reduced power emissions and better illuminated panels, resulting in reduced energy consumption and longer lifespans for digital screens.
- Installing technology to turn off lights on unoccupied static billboards and installation of solar solutions at other sites.
- Setting targets to increase the number of fuel-efficient vehicles for transport fleets.
- Reduction, and in some cases elimination, of plastic packaging for retail operations.
- Providing sponsorships, or in-kind support, for community initiatives that champion environmental causes.
- Environmental management systems, including installation of solar panels, and best practices assuring ISO14001 accreditation for some members.

The research, based on methodology developed by ARRB for Main Roads WA, showed that at the two intersections the display of digital signs was linked to improvements in driver behaviour.

In 2019, the OMA and ARRB co-hosted the National Road Authority Roundtable, the first of its type in Australia. The Roundtable included representatives from road authorities road safety and commercial arms from all states, except South Australia.

The Roundtable attendees committed to meeting annually and to co-fund a collaborative research project, with the OMA, to investigate crash data around digital signs, before and after they were constructed. The attendees also agreed to collaborate on best-practice in assessments and approvals and to sharing data and case studies.

Professor Simon Washington, CEO of Advanced Mobility Analytics, and Associate Professor Paul Roberts, Deputy Director of the Western Australian Centre for Road Safety Research, were commissioned to write methodology for this joint research project.

Road safety

The OMA and its members are committed to road safety, especially when it comes to digital signs.

In 2019, the OMA and the Australian Road Research Board (ARRB) released a major research project into driver behaviour in the presence of digital or static signs. The OMA’s study with the ARRB was conducted over four weeks and monitored two separate intersections in Queensland, each with and without a digital sign.

“Interestingly, the study showed a positive impact on vehicle control from the presence of these digital billboards, and that they had no negative impact on driver performance.”

Associate Professor Paul Roberts, Deputy Director, **Western Australian Centre for Road Safety Research**



6

80 years of being big, bold and bright

Innovation and new technologies have amplified the creative potential of Out of Home (OOH), enabling brands to target relevant audiences contextually for maximum impact.

In 2019, campaigns embraced bold and simple creative across static and digital signs. Advertisers and creatives harnessed the enhanced capabilities of digital OOH with a focus on engagement and interactivity. Facial recognition technology, dynamic creative and live streams were used to promote brands to audiences.

The Creative Collection competition

The Creative Collection competition, launched in 2013, recognises the best in OOH advertising each quarter. Seventy-nine entries were submitted to the competition in 2019 (compared to 130 in 2018) and 22 campaigns were awarded.

Each quarter a panel of judges made up of advertisers, agencies, and OMA members judge advertising creative across four categories. In quarter one 2019, campaigns were judged across these four categories:

- Best Creative Execution
- Best Traditional Use of OOH
- Best Use of Special Build
- Best Use of Technology/Innovation

From quarter two the award categories were updated to reflect the changing advertising landscape with the

campaigns judged under new criteria:

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

Winning campaigns were chosen from an array of brands, including beverages, entertainment and leisure, groceries, media, motor vehicles, pharmaceuticals, retail, and tourism.

The judging panel discussions were robust and many of the advertisement's creativity hotly debated.

The judging panels

Our thanks go out to the judges:

- Nicole Bardsley, Head of Brand, Westpac
- Joe Copley, Director-Partnerships, Seedooh
- Adam J Francis, Founding Partner and Executive Creative Director, AJF GrowthOps
- Guy Futcher, Creative Director, M&C Saatchi
- Wendy Gower, Managing Director, Hearts & Science
- Chiara Greyling, Product Marketing Specialist - New Zealand, JCDecaux
- Hugh Hanlon, General Manager NSW, Hanlon Industries
- Kate Kissane, Head of Brand and Advertising, St. George
- Emily Lewis, Marketing and Commercial Manager, TorchMedia
- Aaron Morton, Sales Director, TorchMedia
- Thanh Nguyen, Campaign Manager, Brand, eBay
- Kerriane Pritchard, General Manager, Country Outdoor Signs
- Jordana Sherlock, National Insights and Strategy Manager, QMS Media
- Theo Zisoglou, Head of Media and Investment, Bohemia Group





“It was inspiring to see how all of the entries stepped beyond what I would think of as traditional use of Out of Home. The winners showcased the unique strength of Outdoor in communicating big ideas, simply and effectively, in concert with their environment.”

Adam J Francis, Founding Partner and Executive Creative Director, **AJF GrowthOps**

“What struck me about the body of work shortlisted this year was the diversity of the thinking and the breadth of different ways to bring ideas to life with Out of Home. That’s what is so great about getting to judge the Grand Prix – the ability to see all of the best work over the entire year across all the judging criteria.”

Sharon Edmondston, Creative Director, **M&C Saatchi**

Grand Prix

Judges are given the prerogative to choose a Grand Prix winner each quarter, if they believe a campaign stands out because it epitomises creative excellence over and above the rest of class.

Only one campaign was awarded a quarterly Grand Prix in 2019. The NRMA’s *First Nations* campaign was awarded a Grand Prix for exemplary use of simple, bold and relevant creative that engendered a strong emotional response.

Unsurprisingly, this campaign went on to win the Grand Prix for 2019 from the pool of winners from each quarter.

Grand Prix panel of judges

Thank you to our judges:

- Sharon Edmondston, Creative Director, M&C Saatchi
- Adam J Francis, Founding Partner, Executive Creative Director, AJF Partnership
- Roxy Howe, Account Director, Hearts & Science

2019 Creative Collection Winners

2019 Creative Collection Winners QUARTER 1	2019 Creative Collection Winners QUARTER 2	2019 Creative Collection Winners QUARTER 3	2019 Creative Collection Winners QUARTER 4
<p>Best Creative Execution <i>Stem Campaign</i> by Flinders University</p> <p>Best Traditional Use of the Out of Home Medium <i>Solo Zero</i> by Asahi Schweppes</p> <p>Honourable Mention <i>Drumstick X Messina</i> by Drumstick</p> <p>Best Use of Special Build <i>Untangle your business phone</i> by Vonage</p> <p>Best Use of Technology and Innovation <i>Dancing with the Stars</i> by Channel 10</p>	<p>Big, Bold and Bright <i>Lego Masters</i> by Nine Entertainment Co.</p> <p>Honourable Mention <i>Rocketman</i> by Paramount Pictures</p> <p>Best Use of Multi-Format <i>Wonder Park</i> by Paramount Pictures</p> <p>Best Use of Digital <i>Now Playing</i> by Southern Cross Austereo</p> <p>Innovation in Out of Home <i>Your Midweek Lift</i> by Tourism North East</p>	<p>Big, Bold and Bright <i>Get Brand New. Get it on eBay</i> by eBay</p> <p>Best Use of Multi-Format <i>Intrastate winter campaign</i> by South Australian Tourism Commission</p> <p>Best Use of Digital <i>Google Multi App</i> by Google</p> <p>Innovation in Out of Home <i>Paco Rabanne Million X Pac Man</i> by Puig/Paco Rabanne</p>	<p>Grand Prix and Big, Bold and Bright <i>First Nations</i> by NRMA Grand Prix 2019</p> <p>Honourable Mention <i>Insurance Pillar</i> by RACQ</p> <p>Best Use of Multi-Format <i>Modibodi</i> by Modibodi <i>Black Friday Sale</i> by eBay</p> <p>Best Use of Digital <i>Simples Fuel</i> by Compare the Market</p> <p>Honourable Mention <i>Lexus Melbourne Cup—The Race that Stops the Nation</i> by Lexus</p> <p>Innovation in Out of Home <i>Fire Ready</i> by Victoria Government</p> <p>Honourable Mention <i>Movember</i> by Movember</p>

7

80 years of innovative solutions

Ten years of continuous innovation and investment in new technologies and tools has seen Out of Home (OOH) evolve to offer immediacy and flexibility with enhanced impact and reach.

Dynamic and future-driven

The OOH channel has long been used for its ability to communicate the right message, in the right place, at the right time. In a fragmented media landscape, OOH has continued to deliver scale and impact to reach 93 per cent of the Australian population every day.

Continued investment in new technologies and tools that provide rich data insights, enhanced targeting and engagement have augmented OOH into an audience-centric communication platform.

Data-driven Digital Out of Home (DOOH) allows for messaging to be contextualised to location, weather, and time



“Our members have invested heavily into a more data-driven digital network. Now that we have a very effective digital offering, the investment will focus on a new measurement metric that informs on the impact of DOOH campaigns.”

Charmaine Moldrich, CEO, OMA

of day. Investment in interactive capabilities with smartphones and digital devices along with technology such WiFi have made OOH effective at engaging audiences in the spaces where they live, work and play.

As the capabilities of DOOH become fully realised, so will its ability to deliver creative that is powerfully optimised to specific contexts and audiences, driving further effectiveness and engagement.

Digital Out of Home revenue

In 2019, DOOH net media revenue represented 55.8 per cent of total OOH media revenue, up from 52 per cent for the same period for 2018.

While digitisation of key sites will continue, the focus has been on integrating online platforms and systems to make the growing digital network easy to sell and buy and seamless for advertisers to access.



“After many years of perfecting the production process and looking for secondary markets, Cactus Imaging is the first in the world using this 360 approach to give billboard skins a second life.”

Nigel Spicer, General Manager, **Cactus Imaging**

Leaders in technology and innovation

OMA members continue to push boundaries, integrating exciting and innovative technologies to expand their digital networks.

In 2018, the MOVE Board committed up to \$10M to rejuvenate MOVE to more accurately measure audiences for digital signs. MOVE partnered with research firm Neuro-Insight to conduct

a \$1.3M Neuroscience Project Study (NPS) to assess audience engagement with digital and traditional OOH across formats, environments and travel modes.

In the coming years, the industry will invest further to build a digital measurement metric that is fit for purpose, to better understand the increased impact and engagement of DOOH signs.

CASE STUDY

Cactus Imaging takes oOh! recycling 360

In a world first, Cactus Imaging and its parent company oOh!media have developed billboard skins which can be recycled into park benches, decking, bollards, fence posts and other high grade recycled polymer products.

SmartSkins set a new benchmark for the OOH industry with the substrate and mounting ropes being 100 per cent recyclable, and also maintaining the high quality of traditional billboards while being cost effective.

The company has invested heavily in developing an environmentally friendly printing option for OOH advertising signs to reflect the demands of Australian advertisers to be more sustainable. The new SmartSkin product has been successfully tested and is available for advertisers nationally. Australian Ethical is one of the early adopters, using the new material for a campaign that ran across NSW and VIC.

At the end of the campaign, the billboard skins and mounting ropes used were sent to Integrated Recycling to be repurposed into products that are comparable substitutes for premium hardwood products.





CASE STUDY

goa's community partnership helps fund medical research

As part of its annual Community Grant Program, goa partnered with Queensland creative agency Flip to back the launch of a world-first medical research funding platform. *The Common Good*, an initiative of The Prince Charles Hospital Foundation, enables people to donate much needed time to researchers, scientists and engineers who are dedicated to tackling the nation's biggest health challenges, including heart disease, lung disease, arthritis, gut disease, dementia and hospital care.

The Common Good has quantified that one hour of medical research they support costs \$44, which has been converted into a tangible currency called 'Time'. The public are able to choose an area or areas of health that matter to them, buy 'Time' to fund these researchers, and then be informed via SMS when the 'Time' they bought is being used. They also receive real-time thanks with their name and donation displayed on goa's digital billboard network.

goa has donated \$250,000 of media space to support the launch of the new research funding platform, as part of its annual Community Partnerships Program.

"Flip has been imperative in the creation of our research funding platform, the first-of-its-kind, and with goa's digital billboard network to support, we hope to generate more support from the community to back some of our brightest medical minds, including young researchers who often find it difficult to kick-start their projects, to complete research that could significantly improve health outcomes," Michael Hornby, CEO, **Prince Charles Hospital Foundation**.

8

80 years of setting the bar high

As Out of Home (OOH) broadcasts to 93 per cent of the Australian population every day, it is incumbent on the industry to meet and exceed the self-regulatory codes that guide the content of OOH signs.

A responsible industry

Maintaining high standards and upholding prevailing community values means being able to respond to changes in public expectations and priorities. To do this we work with our members, government and a range of other stakeholders to ensure that the regulations and codes that govern the industry are appropriate, responsive and practical.

The desire for a sustainable self-regulated industry led to the development of the OMA Code of Ethics and six policies that guide members and ensure they operate their businesses responsibly.

The OMA also works closely with Ad Standards, the Australian Association of National Advertisers (AANA), The Communications Council and the Alcohol Beverages Advertising Code to ensure that members display advertising that aligns with community expectations and meets established best practice. These organisations administer an additional ten self-regulatory advertising industry codes of practice administered by these organisations, bringing the total to 17 self-regulatory codes and policies governing the OOH industry.

Self-regulation and advertising content

The OMA endorses the display of advertising that adheres to the following 17 self-regulatory advertising industry policies and codes of practice:

1. OMA Code of Ethics
2. OMA Advertising Content Policy
3. OMA Digital Signage Policy
4. OMA Alcohol Advertising Policy
5. OMA Political Advertising Policy
6. OMA Placement Policy

7. OMA Environment and Sustainability Policy
8. AANA Code for Advertising and Marketing Communications to Children
9. AANA Code of Ethics
10. AANA Environmental Claims in Advertising and Marketing Code
11. AANA Food and Beverages Advertising and Marketing Communications Code
12. AANA Wagering Advertising and Marketing Communication Code
13. ABAC Responsible Alcohol Marketing Code
14. Australian Food and Grocery Council Quick Service Restaurant Initiative
15. The Federal Chamber of Automotive Industries' Voluntary Code of Practice for Motor Vehicle Advertising
16. The Therapeutic Goods Advertising Code
17. The Weight Management Industry Code of Practice

Content policy and advice services

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

- a national program of Content Training for members and media agencies
- a Copy Advice Service based on OMA policies
- a Concept Advice Service for advertisers and creative agencies to use at the early stage of campaign development.

The OMA reviewed 693 advertisements submitted by members in 2019, rejecting 146 and proposing modifications to 25 (approximately four per cent of all those received).

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

The OMA's Copy and Concept Advisory Service helps eliminate the likelihood of an OOH advertisement breaching one or more of the 17 self-regulatory codes and policies.

Code of Ethics

This ubiquity of OOH advertising and the desire for a sustainable self-regulated industry led to the development of the OMA Code of Ethics, which guides members on responsible business operation.

The Code of Ethics, to which all OMA members must adhere, is a set of principles that define the industry standards for doing business with advertisers and regulators, and 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.

School Mapping Tool

In 2018, a School Mapping Tool was introduced to strengthen the industry's compliance with its self-regulatory guidelines and maintain the safety of clients' brands. The tool was built to ensure OMA members comply with the OMA Placement Policy, which prohibits the advertising of products that are illegal for purchase by minors within a 150m radius of primary and secondary schools, can be monitored. Almost 30,000 schools are now mapped across NSW, QLD, SA, VIC and WA.

Out of Home advertising complaints 2011-2019*

Year	Number of OMA members' complaints upheld	Percentage of all OOH ads	Percentage of complaints to Ad Standards for OOH	In top ten ads most complained about	AANA Guidelines Contravened
2019	1	.003%	10.2%	1	Violence
2018	0	0%	7.0%	0	None
2017	4	.012%	8.3%	0	Sexual appeal, health and safety. discrimination
2016	1	.003%	9.1%	0	Sex, sexuality and nudity
2015	2	.006%	9.3%	0	Discrimination and health and safety
2014	1	.003%	10.4%	1	Violence
2013	1	.003%	16.8%	1	Sex, sexuality and nudity
2012	3	.01%	9.6%	0	Violence, work health and safety
2011	8	.02%	39.1%	3	Sex, sexuality and nudity

Complaints to Ad Standards by media channel 2019*

Media	2019	Media	2019
Television – Free-to-air	71.33%	Promotional material	1.62%
Billboard	4.03%	Outdoor	1.26%
Internet – Social media	3.99%	Other	1.24%
Television - Pay	3.40%	Print	0.78%
Poster	2.82%	Television – Out of Home	0.65%
Radio	2.43%	Email	0.36%
Transport	2.05%	Cinema	0.34%
Television – On demand	1.79%	Mail	0.23%
Internet	1.67%	TOTAL	100.00%

* Ad Standards (adstandards.com.au)



Better regulation

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

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

The OMA is an important partner in the development and application of these regulations. Having forged strong relationships with state road and planning authorities, the OMA ensures that regulations for roadside signage is safe and evidence based in order to avoid a regulatory framework that is overly restrictive and disproportionate.

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

In 2019, the OMA prepared submissions for the following:

- Australian Competition and Consumer Commission (ACCC) Digital Platforms Inquiry
- Australian Association of National Advertisers (AANA) Code Review
- Cumberland Council Large Display Advertising Policy
- Main Roads WA Advertising Policy Review
- National Obesity Strategy Draft Consultation
- NSW Gambling Inducement Guidelines Update
- NSW Government St Leonards and Crows Nest 2036 Draft Plan
- QLD Government's Policy for the Advertising of Unhealthy Food and Drink on Government-Owned Spaces
- VIC Draft Operator Practice Note for Commercial Advertising Content



9

80 years and going strong

In 2019, Out of Home (OOH) net revenue rose 1.5% to hit an all-time high of \$935.5M.

Revenue results

OMA members represent approximately 80 per cent of the revenue generated by the OOH industry. The OMA reports on industry performance through the compilation of revenue results and share of advertising spend for its members.

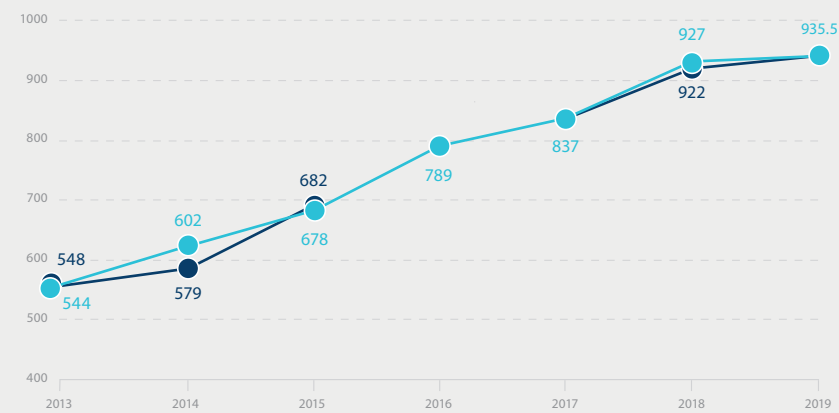
In 2019, the OOH industry experienced its tenth consecutive year of growth. Posting \$935.5M, up from \$921.6M* in 2018; a 1.5 per cent increase on net revenue year-on-year.

The innovation and flexibility offered by Digital Out of Home (DOOH) signs continued to fuel growth. DOOH now represents 55.8 per cent of total revenue, up from 52 per cent in 2018.

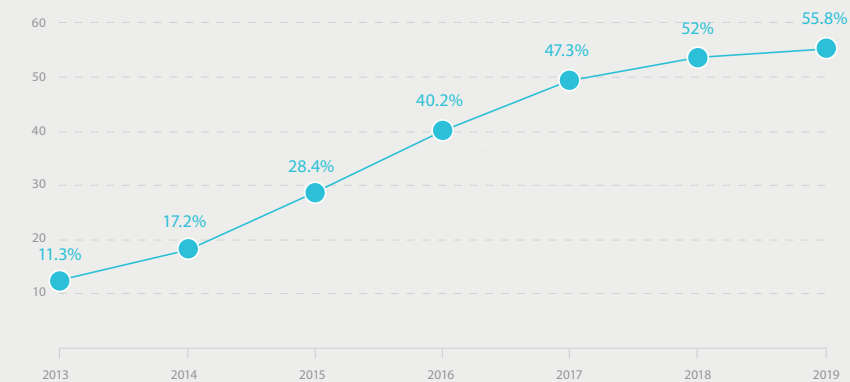
* Previously released revenue figures have been adjusted to reflect changes in the OMA membership.

Revenue results (\$M) 2013 - 2019

Total OOH revenue

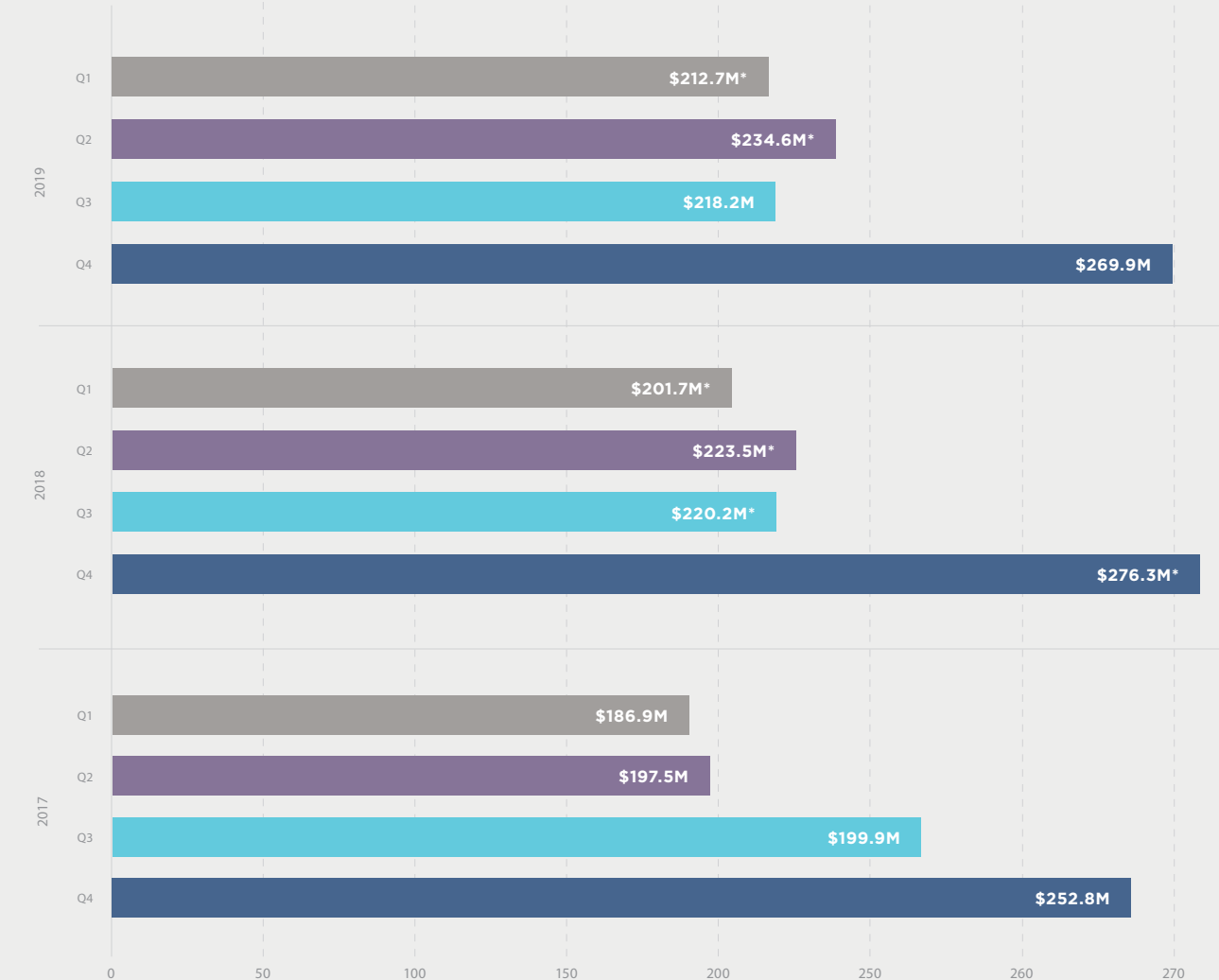


DOOH as a percentage of total OOH revenue



Performance by quarter 2019

OOH revenue by quarter (\$M) 2017 - 2019

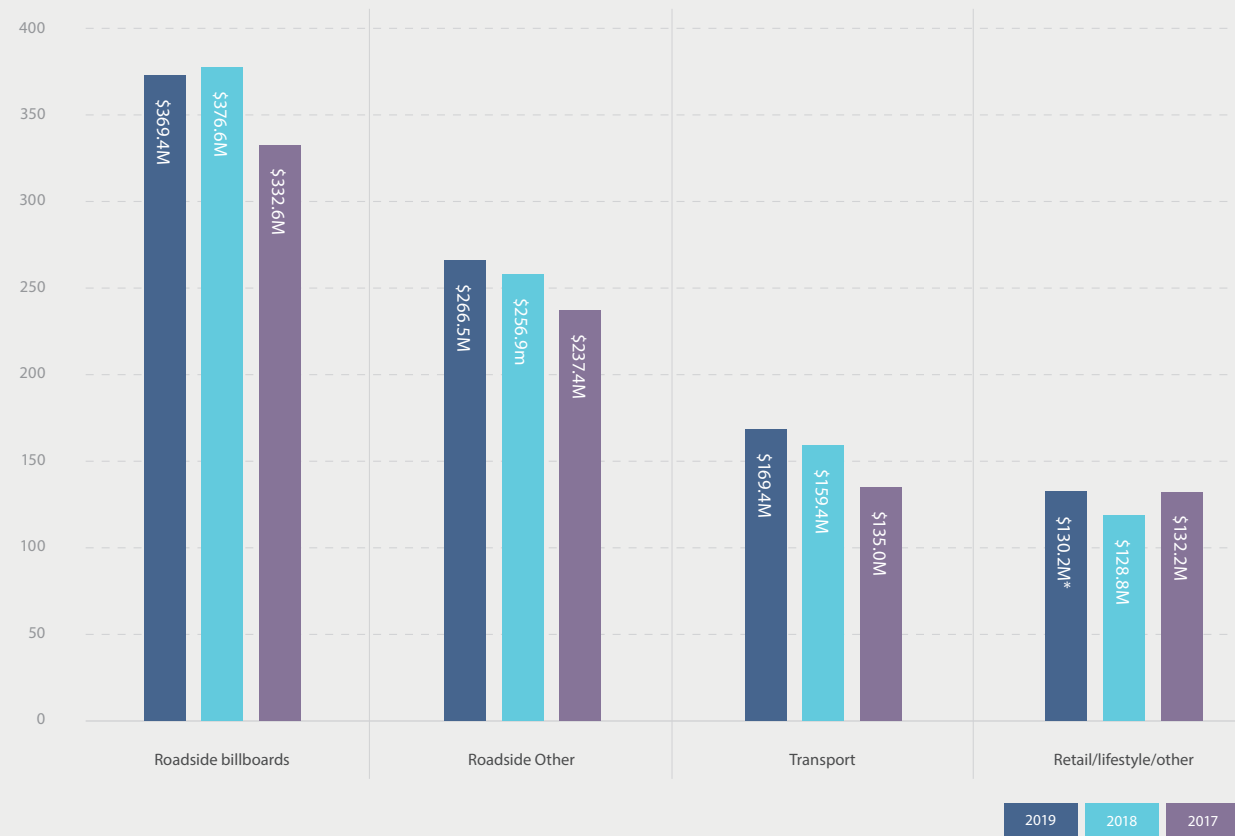


- First quarter net revenue increased by 5.5 per cent to \$212.7M*, up from \$201.7M* in 2018
- Second quarter net revenue increased by 5 per cent to \$234.6M*, up from \$223.5M* in 2018
- Third quarter net revenue decreased by 0.9 per cent to \$218.2M, down from \$221.1M* in 2018
- Fourth quarter net revenue decreased by 2.3 per cent to \$269.9M, down from \$277.5M* in 2018.

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

Performance across formats and locations 2019

OOH revenue across formats and locations (\$M) 2017 - 2019



Category breakdown

- Roadside billboards (over and under 25 square metres) \$369.4M
- Roadside other (bus/tram externals, small format, street furniture) \$266.5M
- Transport (including airports) \$169.4M
- ^Retail/Lifestyle/Other \$130.2M*

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

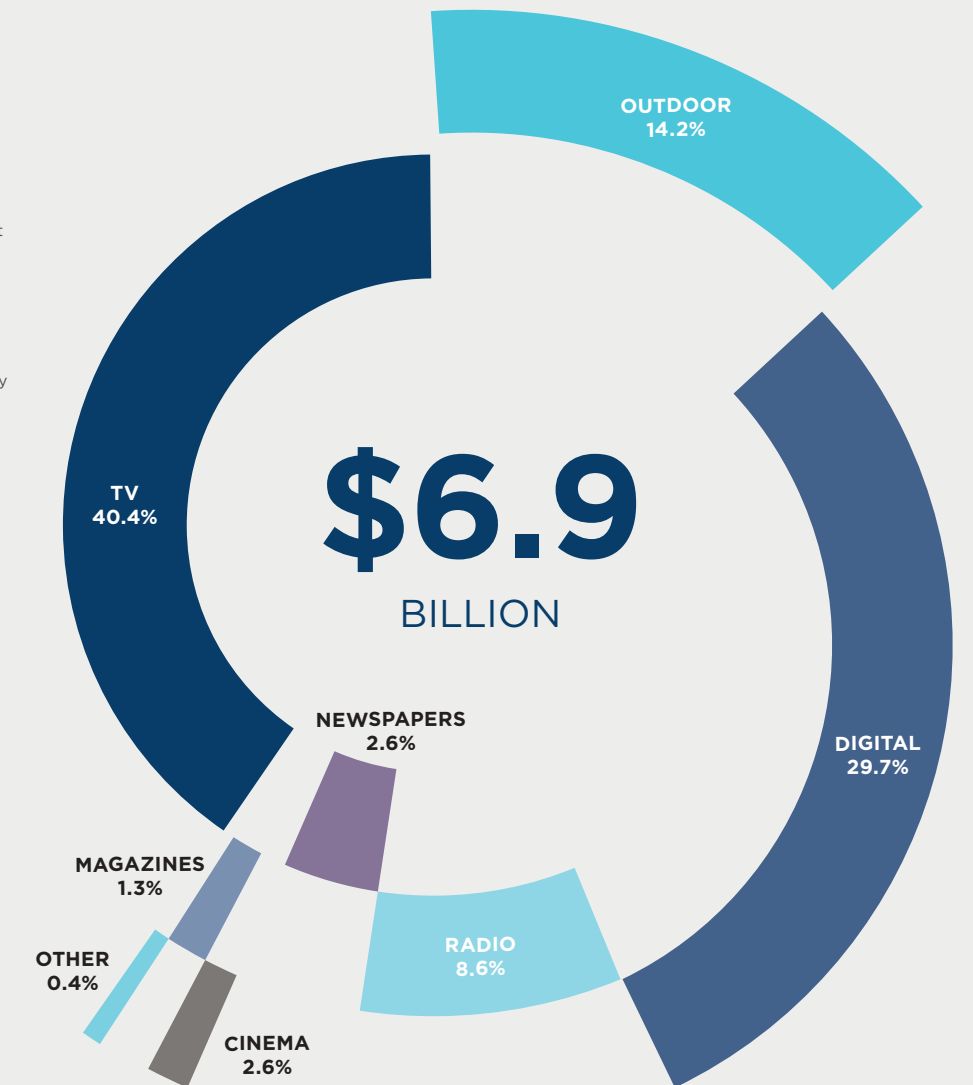
^This category reports shopping centre panels, as well as all place-based digital inventory including office media – covering inventory in lifts and office buildings, cafe panels, as well as digital screens.

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

Percentage share by media of agency advertising spend*

Change from CEASA to SMI

Please note this year's Australian industry share benchmark has been changed to use Standard Media Index (SMI) figures instead of figures supplied by CEASA, used in previous years. This change has come about because the CEASA Report is no longer published due to the death of its complier Bernard Holt. The OMA and all the other industry bodies pay tribute to and thank Mr Holt for his collation and publication of the advertising industry figures. The CEASA report's compilation of the whole of industry figures will be missed. Vale Bernard Holt.



	2019	2018	2017	2016	2015
Television	40.4%	41.4%	42.8%	43.8%	45.9%
Digital	29.7%	28.4%	27.4%	25.2%	22.8%
Outdoor	14.2%	13.8%	12.5%	11.8%	10.9%
Radio	8.6%	8.6%	8.4%	8.3%	7.8%
Newspapers	4.3%	4.9%	5.5%	7.2%	8.1%
Magazines	1.3%	1.5%	1.9%	2.4%	2.9%
Cinema	1.1%	1.0%	1.1%	1.1%	1.1%
Other	0.4%	0.4%	0.3%	0.4%	0.5%

Source: Standard Media Index (SMI).

*SMI figures reflect the media agencies spend on behalf of clients, it does not include the advertising spend by advertisers who book directly with the media operator/channel. Therefore, it does not reflect the total dollars spent on advertising in Australia, but it gives an indication of market share among media agency spending. Please note, SMI does not include advertising booked by the media agencies represented by IPG Mediabrands, which we estimate represents a quarter of the media spent by advertisers, in Australia.

Global advertising spend by channel in \$US*

	All Media	Newspaper	Magazines	Television	Radio	Cinema	Outdoor	Internet	Mobile
2019 (\$M)	615,748.8	38,917.3	16,080.3	187,824.6	32,269.2	3,324.0	41,020.8	296,312.6	190,260.2
2018 (\$M)	601,957.5	43,802.8	17,999.8	196,466.9	32,687.1	3,181.5	40,669.5	267,149.9	159,615.2
2017 (\$M)	558,850.6	49,000.1	20,080.7	193,363.8	32,108.7	2,988.8	38,880.4	222,428.2	113,996.0
2016 (\$M)	533,681.3	54,768.8	22,528.6	199,950.4	31,721.5	2,826.5	37,144.4	184,741.2	81,062.3
2015 (\$M)	515,266.1	61,831.3	25,258.9	199,614.1	32,046.0	2,729.6	37,263.9	156,522.4	48,348.8

International OOH advertising expenditure in \$US*

	2019 (\$M)	2018 (\$M)	2017 (\$M)	2016 (\$M)	2015 (\$M)
Australia	827.9	762.0	705.6	645.3	560.2
Brazil	548.0	586.6	651.0	552.6	498.1
Canada	592.7	593.8	566.0	505.1	498.8
China	11,192.1	11,066.3	9,766.9	8,856.9	9,861.9
France	1,621.3	1,627.9	1,701.3	1,619.7	1,564.1
Germany	1,687.6	1,511.5	1,372.9	1,231.8	1,206.0
India	489.0	459.5	439.6	400.0	380.8
Italy	299.3	289.6	262.2	259.0	260.0
Japan	5,878.2	6,027.2	6,277.6	6,440.2	5,830.9
Russia	738.7	749.5	790.0	611.9	577.6
United Kingdom	1,693.5	1,613.0	1,472.7	1,522.3	1,616.2
12 MARKETS TOTAL	33,261.0	32,772.9	31,153.6	31,153.6	29,634.6

*WARC figures are gross revenue estimates.
Source: WARC Adspend Database. Figures include both Media Agency and direct from client advertising spend on OOH media.

Top 10 OOH sectors

			All media		OOH		
2019	2018	Top 10 sectors	2019 (\$M)	2018 (\$M)	YOY%	2019 (\$M)	% Share
1	1	Retail	1736.8	1737.8	-0.10%	155.3	9%
2	4	Finance	542.5	530.8	2%	103.3	19%
3	2	Motor Vehicles	742.9	785.3	-5%	79.9	11%
4	3	Entertainment & Leisure	513.6	556.5	-8%	79.2	15%
5	5	Communications	519	430.3	21%	73.4	14%
6	8	Media	385.7	289.4	33%	53	14%
7	7	Travel/Accommodation	792.1	735.0	8%	51.3	6%
8	6	Food	237.2	247.2	-4%	48.7	21%
9	9	Insurance*	350.1	309.5	13%	44	13%
10	9	Gambling/Gaming	276.6	274.2	0.90%	43	16%

Top 10 OOH advertisers

			All media		OOH		
2019	2018	Top 10 advertisers	2019 (\$M)	2018 (\$M)	YOY%	2019 (\$M)	% Share
1	10	Commonwealth Bank	48.4	35.1	38%	16.1	33%
2	2	McDonalds Family Restaurants	82.7	66.9	24%	15.2	18%
3	3	Woolworths Supermarkets	84.2	86.9	-3%	14.1	17%
4	29	Amazon.com	51	32.4	57%	10.1	20%
5	4	Optus*	36.7	38.0	-3%	8.6	23%
6	11	Telstra Corporation	53.2	61.5	-13%	7.9	15%
7	21	Apple Computers	38	30.0	27%	7.9	21%
8	49	Chemist Warehouse	55.2	52.8	5%	7	13%
9	76	Coles Supermarkets	68.4	61.9	11%	5.2	8%
10	24	Flight Centre	41.6	39.0	7%	4.9	12%

Source: Nielsen Ad Intel 2019. *Nielsen reserves the right to adjust ranking retrospectively.

10

80 years of teamwork

The OMA and MOVE committees, comprised of team members from across the OMA's membership base, assist in identifying and managing key opportunities affecting the Out of Home (OOH) industry and the development of MOVE.

OMA membership

OMA members are passionate and responsible, innovative and collegiate. They embrace new technologies and systems to enable a sustainable approach to growth.

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

OMA membership is divided into three categories:

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

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



Non-Media Display Members are a variety of businesses that provide goods and services to the OOH industry.

Asset Owners own the property where OOH advertising stands.

Benefits to members

OMA membership adds to business performance through a range of services:

Innovation

- Access to state-of-the art audience measurement
- Access to custom research into industry advances

Leadership

- Invitations to thought leadership, industry seminars, events and awards.
- Benefit from lobbying and advocacy on legislative and self-regulatory issues
- Participation in community partnerships

Standards

- Assistance with industry standards, policy and guidelines
- Support to meet codes and regulations through education and training

Service

- Access to industry reports
- Access to industry-specific, customised Workplace Health and Safety materials
- Access to individual council development control plans

International recognition

oOh!media – International Moodie Davitt Award Winner for Best Tactical Advertising Campaign for Lexus Melbourne Cup 2019

National recognition

2019 Media i awards

The annual Media i Awards gives recognition to sales excellence across all media channels. The awards acknowledge the important role that media sales representatives play in the delivery of outstanding advertising results. They are the only awards dedicated to recognising the contribution of media owners.

In 2019, OMA members claimed four awards at the event. Congratulations to the following individuals who were recognised:

Outdoor/cinema category – sales person of the year

- New South Wales – Tom Bonnell, QMS Media
- Queensland – Renee Jonsen, JCDecaux
- South Australia – Lucy Carey, JCDecaux
- Western Australia – Damien Bodestyne, JCDecaux

B&T Women in Media

- People's Choice award winner – Samantha Hollier-James, oOh!media

OMA and MOVE committees

Finance committee

The Finance Committee provides strategic advice on all OMA and MOVE financial matters. The committee met twice in 2019.

- Sheila Lines, oOh!media
- Charmaine Moldrich, OMA (Chair)
- Brendan O'Neill, JCDecaux
- Kate Solomon, QMS Media

Sales and marketing committee

The Sales and Marketing Committee helps develop strategies for the marketing and communications program delivered by the OMA. There were four meetings of the committee in 2019.

- John Diaz, oOh!media
- Kirsty Dollisson, TorchMedia (Chair)
- Nick Errey, QMS Media
- Matt Fisher, TorchMedia
- Kat Frost, ODNA (resigned in November)
- Julie Jensen, OMA
- Daniel Jess, Bishopp Outdoor Advertising
- Jodie Koning, oOh!media
- Sara Lappage, QMS Media
- Emily Lewis, TorchMedia
- Bruce Mundell, oOh!media
- Oliver Newton, JCDecaux
- David Pullinger, JCDecaux
- Alexandra Simpson, OMA
- Josh Steel, goa
- Essie Wake, JCDecaux
- Emma Ward, OMA
- Christian Zavec, QMS Media

Regulatory affairs committee

The Regulatory affairs Committee oversees all regulatory matters affecting the industry. There were three meetings of the committee in 2019.

- Kelly Ainley, oOh!media
- Luke Brett, oOh!media
- Michael Cali, oOh!media

- Noel Cook, oOh!media
- Kirsty Dollisson, TorchMedia
- Odette Ferreira, oOh!media
- Dima Frolov, ODNA
- Graham Johanson, oOh!media
- Melissa Maggs, goa
- Alice Magon, oOh!media
- Siobhan Marren, OMA/oOh!media
- Charmaine Moldrich, OMA
- Tess Phillips, OMA (Chair)
- Greg Radford, ODNA
- Damien Rath, JCDecaux
- Blair Robertson, Daktronics
- Kirsten Samuels, OMA
- Alexandra Simpson, OMA
- Adam Trevena, QMS Media
- Andrew Tyquin, Outdoor Systems
- Brian Tyquin, Outdoor Systems
- Danielle Tyquin, Outdoor Systems
- Matthew Vincent, JCDecaux
- Graeme Wooster, QMS Media

Regulatory affairs committee Queensland

The Regulatory affairs committee oversees all regulatory matters affecting the Queensland industry. The committee held one meeting in 2019.

- Kelly Ainley, oOh!media
- Peter Bailey, Bailey Print Group
- Anthony Baxter, Paradise Outdoor Advertising
- Brad Bishopp, Bishopp Outdoor Advertising
- Michael Cali, oOh!media
- Karen Cockerell, Paradise Outdoor Advertising
- Kirsty Dollisson, TorchMedia
- Odette Ferreira, oOh!media
- Dima Frolov, ODNA
- Mitch James, Paradise Outdoor Advertising
- Graham Johanson, oOh!media
- Brad Lindsay, JCDecaux
- David Lovatt, oOh!media

- Melissa Maggs, goa
- Siobhan Marren, OMA/oOh!media
- Nick McAlpine, Bishopp Outdoor Advertising
- Charmaine Moldrich, OMA
- Tess Phillips/Emma Carr, OMA (Chair)
- Damian Potter, JCDecaux
- Greg Radford, ODNA
- Peter Reynolds, oOh!media
- Kirsten Samuels, OMA
- Peter Savage, Savage Outdoor
- Alexandra Simpson, OMA
- Rod Taylor, Tayco Outdoor
- Adam Trevena, QMS Media
- Chris Tyquin, goa
- Matthew Vincent, JCDecaux

Work Health and Safety committee

The Work Health and Safety (WHS) Committee oversees matters relating to WHS issues affecting the industry. There were no committee meetings in 2019.

- Glenn Badcock, JCDecaux
- Peter Bailey, Bailey Print Group
- Brad Bishopp, Bishopp Outdoor Advertising
- Steve Bovey, QMS Media
- Pierre Brits, Prime Signs
- Brian Freeman, oOh!media
- Elly Hanlon, Hanlon Industries
- Mitch James, Paradise Outdoor Advertising
- Stephen Lambourne, SS Signs
- Kylie Maughan, TorchMedia
- Charmaine Moldrich, OMA
- Corinna Murtaugh, JCDecaux
- Tess Phillips, OMA (Chair)
- Ajay Powell, JCDecaux
- Craig Pritchard, Country Outdoor Signs
- Rosemary Roberts, oOh!media



Media i award winners (left to right): Damien Bodestyne, Renee Jonsen, Tom Bonnell, Lucy Carey and Tom Zavec.

- Blair Robertson, Daktronics
- Sam Rudd, Prime Signs
- Nigel Spicer, Cactus Imaging
- Peter Tyquin, goa
- Collin Willshire, Prime Signs

CORE committee

The new platform CORE (Centralised Outdoor Response Engine), developed to make it easier to buy and sell OOH, will enable agency users and clients to brief campaigns across all OOH suppliers and formats nationwide. CORE was soft-launched in 2019. The committee met once in 2019.

- Katie Ashton, JCDecaux
- Cassandra Cameron, JCDecaux
- Greg Davis, oOh!media
- Kimberly Evangelista, JCDecaux
- Steve Geelan, oOh!media
- Kylie Green, MOVE (Chair)
- Grant Guesdon, MOVE
- John Purcell, oOh!media
- Jordana Sherlock, QMS Media
- Cristina Smart, JCDecaux

MOVE technical committee

The MOVE Technical Committee (TECHCOM) is comprised of technical representatives from each of the major operators/owners of MOVE and is supported by MOVE staff. TECHCOM oversees all of MOVE's technical development and modelling. This includes data and software updates and the modelling and technical developments used to derive OOH measurement results. There were 13 meetings of TECHCOM in 2019.

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



11

OMA members

OMA membership decreased from 42 in 2018 to 34 in 2019. Member companies represent approximately 80 per cent of the Out of Home (OOH) industry in Australia.

Media display members



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

baileyprintgroup.com.au



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

goa.com.au



MOOH is an Out of Home media specialist focused on new and innovative digital Taxi Media solutions.

mooh.com.au



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

bishopp.com.au



JCDecaux is a leading Out of Home media company worldwide, with more than 1 million advertising panels in more than 80 countries and more than 13,000 employees. Incorporated in 1964 in France, JCDecaux was listed on the Paris Stock Exchange in 2001. JCDecaux has been providing high quality, architecturally designed street furniture in Australia since 1997. Its Australian and New Zealand businesses includes 40,000 assets spanning airports, rail, transit, static and digital billboards.

jcdecaux.com.au



Established in 2012, Outdoor Digital Network Advertising (ODNA) has grown to address a gap in the Queensland suburban retail market. Currently providing 22 sites and 29 screens in premium locations and growing rapidly, ODNA's digital billboards target premier retail precincts, with a focus on high traffic and ideal viewing locations.

odna.com.au



oOh!media is a pioneering media company changing the face of the Out of Home industry in Australia and New Zealand. Through their commitment to market leading data, ideas and driving 1+ reach, oOh! makes brands powerfully unmissable. oOh! invests in sophisticated data to ensure we know audiences at location better than anyone else and via their extensive network, provide unrivalled reach that maximises ROI. oOh!'s 37,000 assets in capital city and regional areas offer solutions in six environments: Road, Retail, Airport, Rail, Street Furniture, and Place-Based (universities, venues, cafes and offices). oOh! owns and operates digital publisher Junkee Media and printing business Cactus.

oohmedia.com.au



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

outdoorsystems.com.au



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

paradiseoutdoor.com.au



QMS Media is a leading digital Outdoor and sports media company, with a strategic focus in providing clients and agencies with dynamic and innovative advertising solutions, underpinned by the latest developments in technology and data. Connecting audiences through multiple touchpoints and customised data, QMS provides multi-platform engagement across its portfolio of premium landmark digital and traditional billboards, exclusive street furniture and airport opportunities, and the largest on-field sports media network in Australia.

qmsmedia.com



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



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

taycooutdoor.com.au



TorchMedia is a specialist transit OOH provider on Australia's Eastern Seaboard. TorchMedia's vibrant portfolio of assets spanning light rail, heavy rail and ferries starts a conversation with over two million people on their commute daily. TorchMedia's range of high-impact and targeted transit formats offers flexible, accountable campaigns that deliver results.

torchmedia.com.au

Non-media display members



Broadsign is making it easier than ever for media owners, agencies and brands to harness the power of OOH and connect with audiences across the globe. Powering over 425,000 signs in airports, shopping malls, health clinics, transit systems and more, Broadsign is at the heart of people's lives. The Broadsign platform helps media owners more efficiently manage their business operations while enabling brands and agencies to easily book OOH campaigns. The platform includes tools for content distribution, playback and proof of performance; sales inventory availability and proposal generation; automated programmatic DOOH transactions; and OOH business operations. Broadsign Ayuda in April 2019.

broadsign.com



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

cosigns.com.au



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

hanlonindustries.com.au



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

primesigns.com.au



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

seedooh.com



As an Australian-owned and operated company with 25 years' combined experience in the industry, **Big Screen Video** is Australia's most trusted LED screen supplier. Offering turn-key solutions and an extensive service department operating within Australia to make the entire experience as easy as possible.

bigscreenvideo.com.au



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

daktronics.com



MMT is one of Australia's leading large format digital printing businesses. As pioneers of the industry, MMT has expanded its printing and fabrication capabilities to cater for production of billboards, street furniture, back-lit displays, hoardings, fleet graphics, point-of-sale and signage applications with speed and precision.

mmtprint.com.au



Rojo Pacific
LARGE FORMAT PRINTING MATERIALS

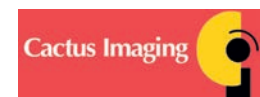
Rojo Pacific brings you the world's best wide-format media for OOH, point-of-sale, signs and displays. Australian-owned and with an extensive national network, it combines global reach with local expertise to deliver the right solution, whenever and wherever you need it.

rojopacific.com.au



Beginning with people passionate about sport, including former players and lifelong fans, a common goal to enhance the fan experience was realised. Developing cutting-edge LED and display technologies, **Techfront** gives new dimension to the way sport is experienced. Technologies are embedded across the full fan journey, creating a media experience spanning in-game, OOH, online and broadcast channels.

techfront.com.au



Cactus Imaging is Australasia's leading production house for digital printing of large-format images. It specialises in producing front-lit and back-lit billboards, fabric displays, truck-side advertising, stadium and arena displays, shopping mall displays, transit/taxi graphics, building wraps, exhibition graphics and displays, wall murals, banners, movie and stage backdrops, as well as point-of-sale displays.

cactusimaging.com.au



GSP are outdoor specialists in the production of large format printing for billboards, street furniture, vehicle graphics, decals and fence mesh banners. Through strong relationships with media companies, manufacturers and retailers, GSP have a clear understanding of industry trends and requirements. GSP has nearly 50 years of delivering campaigns on time and to budget exceeding client expectations.

gspprint.com.au



Omnigraphics is a grand-format digital printer with offices in Melbourne and Sydney, and representation in Adelaide, Brisbane and Perth. Omnigraphics specialises in printing billboards, banners, street furniture, hoardings, lightboxes, point-of-purchase, retail signage, and much more. Omnigraphics continues to invest in new technologies and processes, making it the partner of choice for Australia's leading brands.

omnigraphics.com.au



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

transportnsw.info



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

sydneyairport.com.au



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

telstra.com.au

12

Beneficiaries

Some of the more than 230 arts, sports, government, and charitable organisations supported by the Out of Home (OOH) industry in 2019.

350.org	Cancer Council South Australia Cancer Council Victoria	Foundation Against Child Exploitation	LiveLighter	Perth Airport Perth Theatre Trust Pink Hope Plan International Australia Polished Man Pop Up Globe theatre	State Opera of South Australia State Theatre Company of South Australia Stay Kind STOP. One Punch Can Kill Surf Life Saving Australia Surf Life Saving Western Australia Sydney Children's Hospital Foundation Sydney Dance Company Sydney Opera House Sydney Symphony Orchestra Sydney Theatre Company	West Australian Ballet Company West Australian Opera West Australian Symphony Orchestra Western Australia Youth Jazz Orchestra Western Australian Museum Westpac Rescue Helicopter Service Whitelion Withcott Litter Prevention Women's Health Week World Suicide Prevention Day World Vision Australia	City of Stirling City of Stonnington City of Sydney Institute for Urban Indigenous Health Queensland Lockyer Valley Regional Council Mental Health Commission Mindarie Regional Council Moonee Valley City Council Moreton Bay Industry and Tourism
Achieve Australia Adelaide Festival Adelaide Symphony Orchestra Affordable Art Fair Melbourne Amnesty International Anglicare Animals Australia Art Gallery of New South Wales Art Gallery of South Australia Art Gallery of Western Australia ASX Refinitiv Charity Foundation Australia Says No More Australian Children's Music Foundation Australian National Maritime Museum Australian Red Cross Australian Shakespeare Company Australian Zoo	CanTeen Centre for Healthy Brain Ageing Cerebral Palsy Alliance Chain Reaction Challenge Foundation Childhood Cancer Support Children's Cancer Foundation China Cultural Centre Chip In for Mary Potter Cirque du Soleil Contemporary Dance Company Western Australia Cure Brain Cancer Foundation Cure Cancer Currumbin Wildlife Hospital	Georgina Josephine Foundation Good Food and Wine Show Greenpeace Australia Griffin Theatre Company HeartKids HepatitisWA Human Appeal International Australia Humpty Dumpty Foundation Hutt St Centre Illusive Entertainment Indian Film Festival Melbourne Influenza Prevention Ipswich Festival Ipswich Jets It's A Bloke Thing Foundation	MAA International MacKillop Family Maddie Riewoldt's Vision Make-A-Wish Australia Maleny Botanic Gardens and Bird World McGrath Foundation Melbourne Theatre Company Mission Australia Movember Foundation MSWA (formerly Multiple Sclerosis Society of Western Australia) Muscular Dystrophy South Australia Museum of Contemporary Art Australia Museum of Discovery Museums Victoria Musica Viva Australia	Queensland Art Gallery and Gallery of Modern Art Queensland Eye Institute Queensland Museum Queensland Performing Arts Centre Queensland Theatre Company R U OK? Day Red Nose Day Redkite Revelation Perth International Film Festival Rimmel I Will Not Be Deleted Ronald McDonald House Charities Royal Edinburgh Military Tattoo RSPCA Australia RSPCA Queensland RSPCA South Australia	Taronga Conservation Society Australia The Arts Centre The Australian Ballet The Big Issue The Common Good The Exodus Foundation The Heart Foundation The Oasis Project The Salvation Army The Smith Family The Ted Whitten Foundation The Very Popular Theatre Company The Walkley Foundation The Wilderness Society Think Inc Thomas Kelly Youth Foundation Toowoomba Hospital Foundation Tour de Cure Tourism Victoria Two Good Co. Uniting Care Community Uniting Home and Community Care UnLtd	Yirra Yaakin Aboriginal Corporation Youngcare Youth Futures Western Australia GOVERNMENT Aboriginal Health Council of Western Australia Australian Energy Foundation Australian Federal Police Australian Government Central Coast Council City of Adelaide City of Armadale City of Brisbane City of Canada Bay City of Canterbury Bankstown City of Charles Sturt City of Darebin City of Fremantle City of Holdfast City of Joondalup City of Karratha City of Mandurah City of Melbourne City of Perth City of Randwick	National Australia Day Council New South Wales Government North Sydney Council Queensland Government Quit Victoria Royal Women's Hospital Somerset Regional Council South Australia Health South Australian Government Strathfield Municipal Council Sunshine Coast Regional Council Toowoomba Chamber of Commerce Transport Authority Western Australia Transport for New South Wales Transport Victoria Victorian Government Western Australian Government
Barking Gecko Theatre Company Be Centre Belvoir St Theatre Black Swan Theatre Company Blue Ribbon Foundation Brain Foundation Breast Cancer Campaign Breast Cancer Trials Brisbane Airport Brisbane Festival Bully Zero Cancer Council New South Wales	Diabetes Australia Djuki Mala DrinkWise Drought Angels Dylan Alcott Foundation Edgar's Mission Farm Sanctuary Falls Festival Falun Gong Association of Western Australia Farmers Across Borders Financial Markets Foundation for Children FORM	Jeans For Genes Juiced TV Kids Under Cover Kidsafe Australia Kingston Arts Centre Kmart Wishing Tree LaBoite Theatre Company Legacy Leukaemia Foundation Life Without Barriers Lifeline	National Breast Cancer Foundation National Gallery Victoria Newcastle Rescue Helicopter Service One Fell Swoop Circus Opera Australia Opera Queensland Orana Films Ovarian Cancer Australia Perry Cross Spinal Research Foundation	Sam Prince Group SANE Australia Sayle Family Trust Scitech Scouts Australia Shake It Up Australia Foundation Shen Yun Performing Arts Sister2Sister Snowdome Foundation Solar Buddy Sony Foundation Australia South Australian Museum Soweto Gospel Choir Special Children's Christmas Parties St George Foundation	Vision Australia		



CELEBRATING EIGHTY YEARS OF LOOKING UP

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