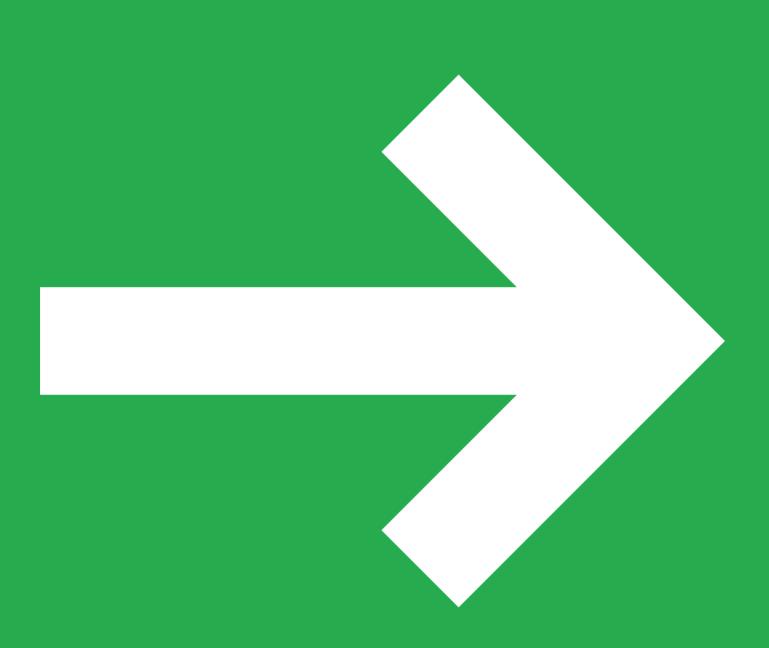**OUTDOOR
MEDIA
ASSOCIATION**

Annual Report 2018

Welcome to the OMA's Annual Report which takes an in-depth look at what the industry achieved in 2018. The Annual Report touches on some of the industry's plans; particularly the use of technology that will have an impact on how the industry shapes its future.
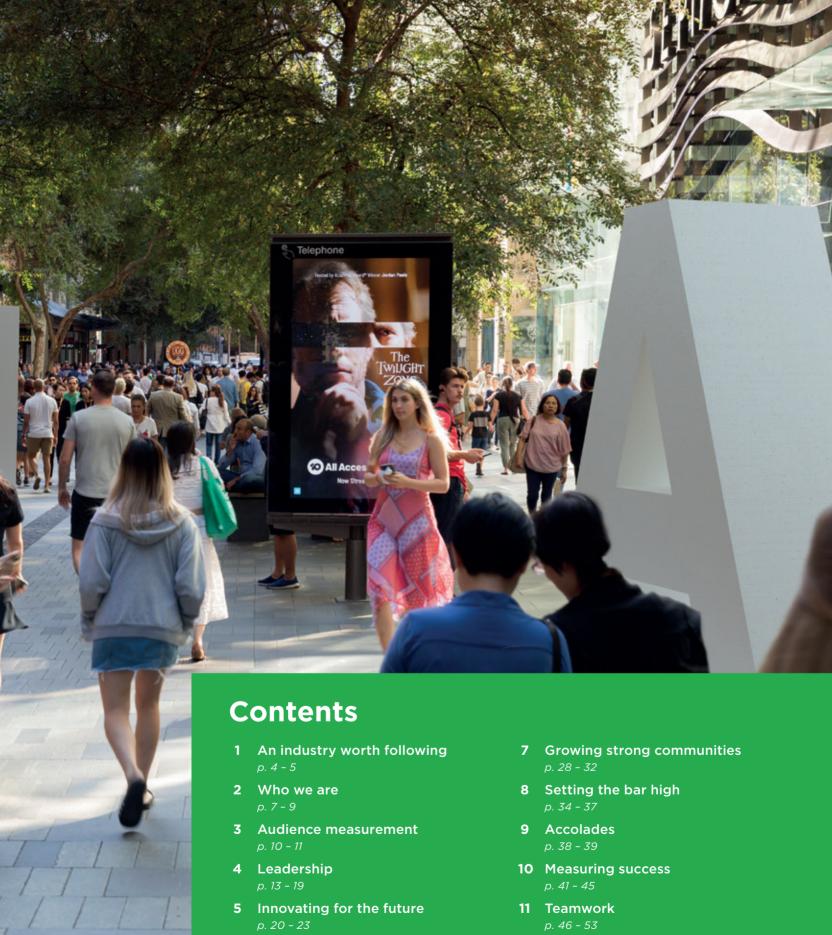
The Outdoor Media Association (OMA) is the peak industry body that represents companies who display Out of Home (OOH) advertising.

OMA members display advertising for products and services that are displayed on signs large and small across a variety of locations in Australia.

"OMA members have invested hundreds of millions of dollars in innovation and smart city technology to build a dynamic digital network that offers advertisers scale, impact, context, and immediacy – now and into the future."

Charmaine Moldrich, CEO,
OMA and MOVE

Contents

An industry worth following

In 2018 the Out of Home (OOH) industry reached more people and increased revenue. Here are some of the highlights and achievements for the year.

A growing audience

Out of Home (OOH) advertising reaches 93% of Australia's population living in and around the capital cities. That's 12.7M people making 53M trips every day across Adelaide, Brisbane, Melbourne, Perth, and Sydney. *p.10*

MOVE, the industry's audience measurement system, measures 72,600 advertising signs and reports that people see an average of 30 signs each day. *p.10*

OOH audiences grew 2.2% in 2018, an increase of 200,000 people since 2017. *p.10*

MOVE announced an investment of up to $10M for development of a metric to measure digital OOH signs, to create the next generation of dynamic audience measurement. *p.10*

Consolidation

In 2018 there were two major acquisitions and mergers; oOh!media purchased Adshel and JCDecaux purchased APN Outdoor. This heralds a significant consolidation of the industry. *p.14*

Thought leadership

The Outdoor Media Association (OMA) presented eminent neuroscientist, Dr Fiona Kerr, interviewed by Dr Norman Swan, founder of OMA member company Tonic Health Media and a host on ABC Radio National. They shared the secrets of the human mind at an Advertising Week breakfast event. During the session, over 130 attendees learned that they could forge more resonant connections with others and tap into moments of genius just by looking up. This event marked the launch of the industry-wide initiative 'Look Up.' *p.25*

Good for communities

With an estimated $1 out of every $2 in OOH revenue returned to governments and other landlords in rent and taxes, the OOH industry is a key contributor to the development and upkeep of essential public infrastructure. *p.28*

The industry donated $69M in media services and advertising placement to more than 200 arts, sports, and charitable organisations across the country. *p.28*

The industry supported National Missing Persons Week for the tenth year with a campaign that reached 11M Australians in one week. The campaign valued at $1.7M was the largest donation in the history of the partnership. *p.28*

OMA members continued to build and maintain over 17,000 items of community infrastructure valued at $352M, including bus shelters, kiosks, park benches, telephone booths and pedestrian bridges. *p.28*

The industry partnered with DrinkWise to broadcast a campaign entitled 'Children can inherit more than your looks' to promote behavioural change by encouraging adults to modify their alcohol consumption, particularly around children. The campaign ran over two weeks, was valued at $2.4M and reached 11M Australians. The results were overwhelmingly positive. *p.30*

A new School Mapping Tool was introduced to strengthen the industry's compliance with its self-regulatory guidelines and maintain the safety of clients' brands. Sitting within MOVE, the tool was built to ensure that the OMA's guideline that prohibits the advertising of products that are illegal for sale to minors within a 150m of primary and secondary schools, can be monitored. Almost 30,000 schools are now mapped across NSW, QLD, SA, VIC, and WA. *p.34*

Record results

Net media revenue increased 10.8% to an all-time high of $927.2M, with 52.3% of this attributed to revenue from digital signs. *p.41*

The OOH industry commands 6.2% of the $15B in total spend across the advertising industry. OOH is the only traditional media channel that keeps growing. *p.44*

Who we are

Out of Home (OOH) is advertising for products and services that you see outside the home, on a variety of signs, across various locations.

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 Out of Home (OOH) industry.

OMA members represent approximately 80% of the OOH revenue generated in Australia.

In Australia, the OMA is the leading voice on OOH advertising. It aims to maximise the creative potential of the channel and ensure it is a sustainable industry that benefits the community.

By 2050, it is estimated that 94% of Australia's population will live in urban environments. This trend, accompanied by new digital OOH technologies, points to ongoing growth.

The industry plays an important role in the economy and liveability of cities. Over 50% of OOH revenue is returned to governments and landlords around Australia, ensuring a constant and ongoing investment in urban infrastructure and technology.

It is the OMA's mission to support sustained growth and highlight industry contribution to the economy and community. It showcases the best of OOH advertising and provides fact-based information about OOH advertising's effectiveness.

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

Governance

The OMA is governed by a Board of Directors (*p.16*) who are elected by the membership. The Board met five times in 2018.

OMA members (*p.50*) adhere to an industry Code of Ethics (*p.36*) to ensure that members operate responsibly and abide by the industry's self-regulatory framework.

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

Our approach

Bold & Courageous

OOH advertising is a place-maker and social connector. The OMA provides leadership and direction for an innovative and growing industry.

Open & Collaborative

OOH advertising delivers commercial and community outcomes. The OMA is the conduit between its members, government agencies, advertisers and the community.

Dynamic & Future Driven

OOH advertising is at the forefront of digital and interactive display technology. The OMA is agile and energetic in response, anticipating and embracing industry opportunities.

Knowledgeable & Authoritative

OOH advertising is a powerful presence across our urban environments. The OMA promotes integrity and best practice for industry compliance to its self regulatory framework.

Measurement of Outdoor Visibility and Exposure (MOVE)

MOVE is an online platform measuring all major OOH environments including airports, bus/railway stations and concourses, bus/train/tram/light rail internal and external signs, roadside and shopping centres.

In 2018, MOVE was accessed monthly by 590 users 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, and the Australian Association of National Advertisers.

Governance

MOVE is owned by a group of shareholders who vote for a Board of Directors. The MOVE Board met four times in 2018.

OOH companies measured by MOVE

- Adshel
- APN Outdoor
- Bishopp Outdoor Advertising
- goa
- JCDecaux
- oOh!media
- Outdoor Systems
- QMS Media
- Savage Signs
- TorchMedia

Who uses MOVE

Since launching in 2010, MOVE has become an essential tool for media planners and strategists. Site traffic continued to increase in 2018 with 981 agency staff logging into MOVE a total of 16,191 times which is an increase of 26% on 2017. An additional 375 MOVE members logged in 28,044 times which is an increase of 9% on 2017.

The OOH industry continues to improve and update MOVE to ensure the ease of media planning.

Training

A key service provided by the MOVE team is a training program run nationally throughout the year. In 2018, a total of 342 people attended training: 273 attended agency software training; 61 members attended site classification training; and 31 people: agency staff, and members, attended methodology training.

OOH is brand safe

A new School Mapping Tool was built by the MOVE team in 2018 to ensure products that are illegal for purchase by minors are not advertised within a 150m of primary or secondary schools (in line with the OMA Placement Policy, *p.34*).

Mapping the locations and boundaries of almost 30,000 schools across NSW, QLD, SA, VIC and WA, the School Mapping Tool ensures that OOH ads are safe for both the advertiser and the public.

This innovation comes at a time when brand safety is a major concern for advertisers. Programmatic selling online means placement mistakes can happen easily for any channel. The risk is much smaller for OOH, but as it reaches 93% of the population living in and around Australia's capital cities who see on average 30 OOH advertisements each day, the industry is proactively embracing new innovations to give advertisers peace of mind that OOH advertising is brand safe.

Centralised Outdoor Response Engine (CORE)

The OMA continues its journey of innovation in OOH advertising, completing work on a new automated software platform that will make it easier to plan and buy OOH advertising. CORE will launch in 2019.

> **"CORE, our new and innovative 'one stop shop' platform for buying and selling OOH advertising will be launched in 2019. It will provide efficiencies through automation, as well as ease for buyers and sellers."**

Kylie Green, Innovation and Training Manager, **MOVE**

Audience measurement

MOVE revolutionised Out of Home (OOH) audience measurement in Australia when it launched in 2010. Eight years on, the Board have committed to invest up to $10M to rejuvenate it to accurately measure audiences for digital OOH signs.

Accurate measurement

MOVE simplifies the planning and buying of Out of Home (OOH) advertising by producing audience measurement results for any combination of formats or tailored packages. As well as providing results numerically, an inbuilt mapping function visually displays the reach of a campaign against the chosen demographic and market(s).

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. LTS accounts for a number of visibility factors including individuals' modes of transportation, speed and viewing location, as well as metrics such as size of the sign and its illumination.

MOVE measures 72,600 advertising signs across Australia's major capital cities: Adelaide, Brisbane, Melbourne, Perth, and Sydney.

MOVE data update

For the eighth consecutive year following the launch of MOVE, OOH audiences have increased. In 2018 the data showed overall audience growth of 2.2%.

OOH advertising now reaches 12.7M Australians every day, taking 53M trips across the five markets measured by MOVE. Some changes in 2018 included:

- Improved methodology used to measure transit audiences more accurately
- Expanded measurement to include double decker buses
- Updated Australian Bureau of Statistics data.

Digital measurement

The OOH industry has invested hundreds of millions of dollars over the last decade to build a modern dynamic channel with the scale to reach almost every Australian. The MOVE Board responded to these rapid technology upgrades by announcing in 2018 an investment of up to $10M to develop a metric for measuring audiences for digital OOH signs.

In order to produce a metric that is fit for purpose now and into the future, MOVE will investigate various international models, as well as invest in data and research to create the next generation of dynamic audience measurement.

MORE CONNECTED
THAN EVER.

Leadership

A Message from the Chairman

In my fifth and final year as Chairman, I reflect on the fast pace of change the media industry has encountered; it has rapidly moved from being dominated by newspapers and television to an industry disrupted by the internet.

It was only eight years ago that we launched our audience measurement system MOVE, and at that time we had no digital signs. TV and Print commanded the major share of advertising dollars, 69.2% between them while Out of Home (OOH) accounted for only 4.4% and Online 16.1%. In 2018, Online commands 48.1% of the pie, TV and Print's share has nearly halved to 36.9%, and OOH has grown its share to 6.2%.

Our ability, as one of the oldest media channels, to grow with the times is testament to the investment in innovation and technology that the industry has made which has rewarded us with nine years of continuous growth.

I look back not to focus on the winners and losers but to gain perspective on how rapidly the market shifted.

Growing our digital network

Today, we are proud to be the only traditional advertising medium experiencing growth. Our revenue sits at an all-time high $927.2M with our digital network accounting for 52.3%. Digital signs have supercharged our ability to provide advertisers with not only high impact and visibility but have also added flexibility, immediacy, and contextual relevance to our value proposition.

We are in this enviable position because we haven't been disrupted by the digital revolution, instead it has enhanced us. Our signs are in places where people gather and can't be skipped, blocked, streamed or fast forwarded. Regardless of how short people's attention span becomes there is always a place in our hearts and minds to engage with a well-crafted six-word headline along the daily commute.

Advertisers' primary objective is to connect their brands with their customers. Our job is to prove to them that our network of signs gets their messages to the 93% of the Australian population who are out and about every day.

We have committed up to $10 million to update MOVE to provide a measurement metric that will assist advertisers to better understand the impact our digital signs provide their campaigns.

An industry worth following

It has been a privilege to be the Chairman of the OMA and MOVE for the past five years and to witness this once-in-a-lifetime change in the media landscape that has benefited our industry. Growth like this is not achieved without a commitment to collaboration and hard work. My fellow Board members and the OMA and MOVE teams are to be applauded for their ongoing support and sound leadership, and for being deft and agile in this changing environment.

I step down as Chairman but remain on the board and will continue to make OOH an industry worth following.

Steve O'Connor

Chairman, OMA and MOVE

A Message from the CEO

We started the year with little indication of the seismic shift that was to happen in our industry. The acquisitions of Adshel by oOh!media and APN Outdoor by JCDcecaux transformed the Out of Home (OOH) landscape and set the stage for a new era.

It is with sadness that we bid farewell to the two iconic OOH companies, who were leaders in their own right, and who contributed to the innovation of our industry during a pivotal period of growth. However, it is with great excitement that we look to the future and the opportunities afforded by consolidation: improving ease of buying and investing in new technologies.

Dynamic and future driven

We are an industry that embraces innovation and invests in technology and tools. As well as our investment into digital measurement, we are putting the final touches to our automated proposal platform which we began building two years ago: CORE (Centralised Outdoor Response Engine), to be launched in 2019, will improve the OOH buying experience and become the one-stop shop making it easier to buy and sell signs.

Bold and courageous

We strive to make OOH an industry worth following and we do this by delivering benefits to the community. This year, we updated our policy on where advertisements are placed, to ensure that products and services that are illegal for sale to minors are not placed within 150m of a school. We went one step further building a mapping tool to ensure that our members are compliant with this policy.

We also embarked on a three-year partnership with DrinkWise to promote a campaign entitled 'Children can inherit more than your looks' to encourage adults to modify the way they consume alcohol around children. Our first $2.4M campaign reached 11M Australians in two short weeks, and our research tells us that 32% of people who saw the campaign, had a conversation about alcohol consumption with their family. (*p.30*)

Setting the bar high

As our signs broadcast 24/7 and are seen by 93% of Australians every day, it is incumbent on us to meet all the self-regulatory codes that guide the content of our signs. This year we hit the jackpot and the advertisements we posted were 100% compliant with no breaches issued for OOH advertisements.

Giving back

It is a privilege that we are afforded the right to be big, bold and sometimes audacious in the public space and this fuels our commitment to give back to the community. We supported two campaigns which are highlighted in this report: National Missing Persons Week (*p.28*) and National Geographic's Photo Ark (*p.29*). These campaigns bring the industry together and show our commitment to serving others. Our members also donated over $69M in media and services to a range of arts, sports and charitable organisations across the country.

Healthy optimism

Our growth, our investment and our commitment to working with communities makes it an exciting time to be working in OOH but it isn't without its challenges. Particularly perplexing is our relationship with our major partner, governments across Australia, as they try to introduce category restrictions, without consultation or consideration for their unintended consequences.
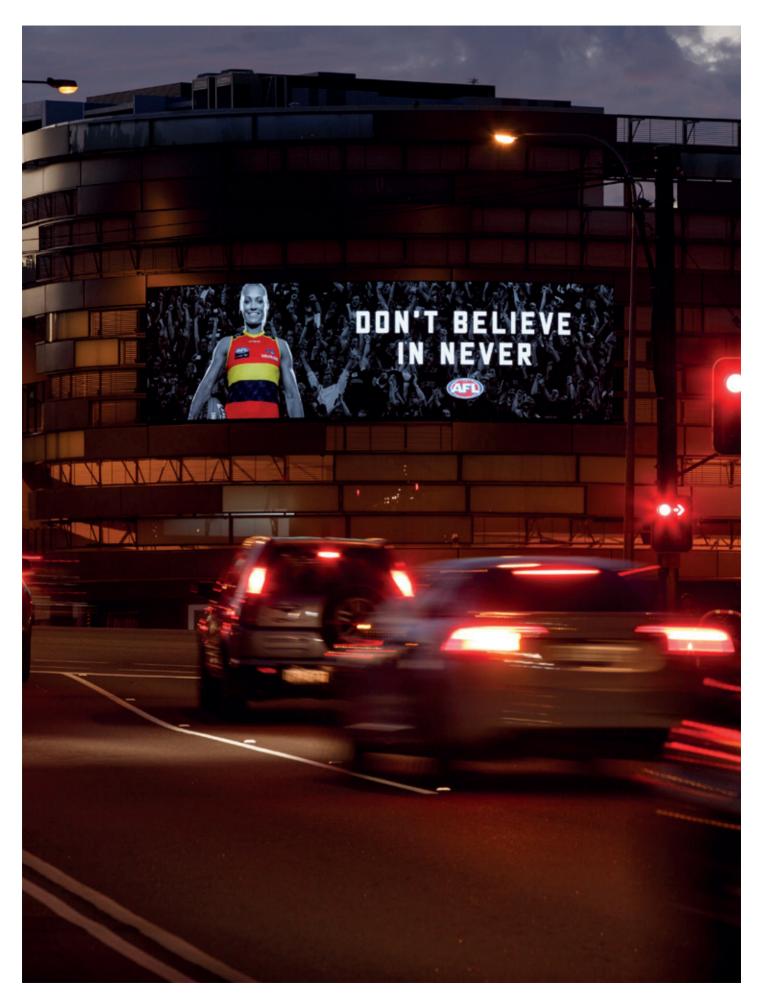
What's more, it's happening at a time when governments are grappling with budget deficits and wanting to do more with less.

Frustratingly these policy decisions which are sometimes made on the run without an evidence base could put our successful business model at risk.

We welcome a regulatory framework that is evidence based and the OOH industry remains strong, committed and focused on its contribution to the Australian economy, the community, its clients and most of all to the 93% of Australians who encounter our signs each and every day.

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 40 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 of 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.

Steve O'Connor – Chairman
JCDECAUX

As the CEO of JCDecaux Australia & New Zealand, Steve is ultimately responsible for all facets of the business. Steve has a proven executive management track record with more than 28 years' experience in the Out of Home industry, 14 of which he has spent as CEO of JCDecaux's Australian business.

Prior to joining JCDecaux Steve worked at Buspak Advertising Group for 14 years where he held a number of roles the last of which was for 6 years where he held the position of Managing Director of the company's Australia & New Zealand operations. Steve has been a Director of the OMA for circa 20 years.

Chris Bregenhoj
MOOH MEDIA

Chris has been involved in the Out of Home industry since 2002, when he facilitated the listing of oOh!media on the ASX. He was executive director there until 2012, and a non-executive director until 2015. In 2016 Chris formed MOOH Media (Mobile Out of Home), a taxi transit media start-up business. Chris has been a Director of the OMA since 2018.

Kirsty Dollisson
TORCHMEDIA

Kirsty has 21 years of Out of Home experience across Boyer Group, Eye Corp 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 for the OMA Sales & Marketing Committee and has been a Director of the OMA since 2017.

John O'Neill
QMS MEDIA

John has over 23 years of experience in the Out of Home industry developing and leading sales teams at QMS Media, Eye Corp, Media Puzzle and oOh!media. As CEO of QMS Media, John is instrumental to the business' 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.

Mike Tyquin
ADSHEL

Mike is an experienced strategic and operating executive with highly developed commercial skills that have been acquired and developed in Australia, New Zealand and South East Asian Markets. He has an entrepreneurial spirit, having started his own company Lodestar Media in 2012 as well as leading Out of Home businesses EYE and Adshel. Mike is a firm believer in industry level collaborative leadership and spent five years as a Director of the OMA.

(Resigned December 2018)

Chris Tyquin
GOA

Chris is a 30-year-plus veteran of the Out of Home industry and is one of the most experienced professionals in the business. A former Chairman of the OMA, he has been responsible for some of the industry's most innovative research studies and played a key role in the development of MOVE. Chris has been a Director of the OMA and MOVE since 2014.

James Warburton
APN OUTDOOR

James commenced working in Out of Home in 2018 as CEO for APN Outdoor. Previous to that, he led V8 Supercars for four years, Seven's commercial operation, and Universal McCann. James was the leading driver of the sale of APN Outdoor to JCDecaux.

(Resigned September 2018)

OMA and MOVE teams

Ti-Ahna Firth
Marketing Manager, OMA

Ti-Ahna came to the OMA with 10 years of experience working in various wholesale and retail positions. She has been instrumental in developing the digital communications strategy, managing events and presentations as well as several trade marketing campaigns. Ti-Ahna joined the OMA in 2013 and has been marketing manager since 2015.

Grant Guesdon
General Manager, MOVE

Grant oversees the MOVE team, including training, data updates, methodology, research, statistical analysis, and innovations. In 2018 he has been instrumental in preparing for new developments in digital measurement, which will be realised over the coming years. Grant has over 13 years of experience in the planning and buying of media campaigns and 20 years of experience in Out of Home measurement. He has been working with MOVE since 2009.

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.

Kylie Green
Innovation and Training Manager, MOVE

Kylie is responsible for managing MOVE's day to day operation, the processing and analysis of data updates and the delivery of its training program. Kylie supports MOVE in associated developments and in 2018 she project managed the building of CORE, the new platform for planning and buying OOH. Kylie has been with the OMA since 2012.

Holly Gregory
Executive Assistant to the CEO, OMA

Holly provides day-to-day support to the CEO, as well as identifying opportunities to improve member services. Holly joined the OMA in 2017.

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 previously worked for the OMA in 2013–2015, rolling out initiatives such as Summer will not be Televised and Anatomy of OOH. Julie returned to the OMA in April 2018 after spending three years in the USA.

Justin Ko
Systems Operator, MOVE

Justin joined MOVE in 2017 to manage the technical side of the system. Justin took over MOVE training in 2018 and travelled the country on a regular basis, presenting to members and agency staff.

Louisa Howard
Marketing and Office Assistant, OMA

Louisa joined the OMA in 2018 not long after completing a double degree in marketing and psychology from Macquarie University. Louisa has quickly become an essential part of the marketing team through her coordination of social media content, developing digital communications, updating the website, and managing the Creative Collection competition.

Siobhan Marren
Senior Policy Adviser, OMA

Siobhan is the regulatory and policy expert for the OMA, bringing with her 15 years of experience in policy development, government relations and advocacy at the state and federal level. Siobhan joined the OMA in 2018, and has supported the industry in negotiating regulatory content restrictions, training members around the self-regulatory codes, as well as working towards the successful launch of the OMA Driver Behaviour Research.

Tess Phillips
General Manager, OMA

Tess oversees government relations and regulatory affairs and is also General Manager of the OMA. She manages all communications and initiatives with regulators, bureaucrats and politicians. Tess's background is in policy and strategy, having worked previously for the Federal Government. Tess has been with the OMA since 2015.

Aditi Phansalkar
Planning and Policy Officer, OMA

(Resigned August 2018)

Innovating for the future

Industry consolidation helps to grow the sector, with a heightened capacity to invest in assets and measurement.

Our growing network

Investment in smart-city technology, infrastructure, digital upgrades and accurate audience measurement is now being realised with digital Out of Home (DOOH) revenue continuing to increase.

The Out of Home (OOH) channel has long been used for its ability to communicate a simple message, with larger than life images and strong branding. With DOOH, it has expanded and revolutionised to also offer shareability, fully interactive capabilities, and targeted data-driven audience engagement, becoming a one-stop shop for promotion, engagement and transaction.

The immediacy and flexibility of DOOH allows for messaging to be formatted to match the weather, the time of day, or even social, political, and sporting events. Content now plays a bigger role, as publishers use DOOH as a communications platform, not just an advertising platform.

In 2018, DOOH net media revenue represented 52.3% of total OOH media revenue, up from 47.3% for the same period last year, and 40.2% for 2016.

The agile, digital network OMA members are investing in today will build trust with communities, contribute to the vibrancy of cities, and add value to advertisers well into the future.

Following the acquisitions of Adshel by oOh!media and APN Outdoor by JCDecaux, 2019 will see increased stabilisation for the industry, with a focus on verification, digital measurement, and transparency.

Digitisation of key sites will continue, and more focus will be put on integrating online platforms and systems to assist the buying process of OOH. The growing digital network will continue to build a seamless experience for consumers.

"The future will be a world of Outdoor advertising that uses all the communication skills and techniques we've learned over decades. It's a world of limitless capability. And as consumers change their worlds to suit their imagination, we'll have to keep up with work that's exciting, provocative, and creative."

Andy Flemming, Creative Director, **M&C Saatchi Australia**

Leaders in technology and innovation

OMA members continue to push boundaries, integrating exciting and innovative technologies to expand the digital network, and facilitate the planning, buying and reporting of Out of Home (OOH) campaigns.

A few achievements:

- APN Outdoor launched 18 new large format digital billboards

- Ayuda Media Systems developed a fully integrated solution for agency software so buyers can include OOH in an online campaign. Additionally, Ayuda with Seedooh partnered to allow existing and future Ayuda clients to receive automated and verified reporting for OOH campaigns

- Daktronics celebrated 50 years of business in 2018, having started as a small company operating out of a garage. Their continued integration with nearly all programmatic and third-party software providers enables seamless OOH transactions

- JCDecaux upgraded the technology used in street furniture to include eye-tracking, which will help advertisers market with precision

- goa introduced several new digital billboards, including the Spring Hill ICONIC, which features an LED light system that is integrated into the building on which it is mounted

- oOh!media launched a new system allowing advertisers to pinpoint the time, day and location for live ads; an Australian first

- Outdoor Systems launched its fourth digital billboard in Sydney – the 100th landmark digital sign with its partner QMS Media

- Paradise Outdoor Advertising launched new digital signs in multiple locations including Toowoomba, Rockhampton and Mackay

- QMS Media expanded its digital portfolio, including the launch of Melbourne's mega landmark, 'The Victoria,' spanning 33 metres across three traffic directions.

Bishopp Outdoor Advertising did their part to support the Australian Red Cross Blood Service "Fill the Gaps" campaign which was perfectly suited to run on their digital signs. The campaign saw Bishopp drop the B and O from their name to highlight which blood types are most needed. Other companies dropping letters as part of the campaign included: Tourism Australia, NAB, Nando's and Luna Park.

A place to shine

Big and bold, cheeky, clever and sometimes controversial, Out of Home (OOH) is the ultimate creative stage, allowing brands to be unique, contextually relevant and targeted, while reaching mass audiences.

The OMA supported and promoted industry creativity in 2018 through its Creative Collection competition and a Thought Leadership Breakfast. The breakfast was part of Advertising Week and introduced new neuroscience research which proves that simply looking up improves people's ability to connect with others and solve complex problems.

In 2018, advertisers and creatives were even more confident using the duality of digital and static signs. Campaigns embraced both formats with the common denominator of simplicity of message. There was also an emphasis on priming; using the same message across multiple modes to enable a greater impact on memorability, and context where messaging was targeted for the path to purchase or the daily commute.

The creative collection competition

Launched in 2013, the OMA's Creative Collection competition recognises the best in Out of Home (OOH) advertising each quarter.

The OMA received over 130 entries (up from 110 in 2017), and from these, 21 campaigns were awarded in the following categories:

– Best creative execution

– Best traditional use of the OOH medium

– Best use of a special build

– Best use of technology/innovation.

The judges were selected from agencies, clients, and OMA members, to provide a variety of perspectives.

Quarter two judge Andrew Dowling, Founder and Managing Director, DO. Agency said: "The judging of this quarter's OMA Creative Collection competition was a difficult task, creating spirited debate among the judges about who should be the eventual winners across each category. While all finalists put forward a strong case for selection, the panel came to a unanimous decision based on each winner's ability to go beyond the obvious and generate an OOH campaign that spoke to its intended audience, in a unique or personalised fashion – whether that be through the topical relevance of the brand and message, seamless integration of technology, or creative impact."

Winning campaigns came from an array of categories, including: motor vehicles, beverages, clothing, entertainment, events, finance,

FMCG, home furnishings, media, pharmaceuticals, retail, and tourism. Judging sessions were invigorating, with pieces of creative hotly debated.

Occasionally, when a campaign epitomises creative excellence, the judges award a quarterly Grand Prix. In quarter three, Yoplait's simple and bold campaign met this criteria, with the judges determining that Yoplait delivered a message that was comprehended within a single glance, using OOH to its fullest brand-building potential (*p.6*).

Grand Prix

The Creative Collection Grand Prix winner for the year is selected from the pool of winners from each quarter.

The news.com.au campaign (*p.26*) won for Best Creative Execution in quarter two and was also awarded the Grand Prix for 2018. The judges noted its combination of simple creative coupled with savvy use of digital immediacy delivered an eye-catching campaign executed to perfection.

"The Outdoor Media Association's thought leadership breakfast was a highlight of Advertising Week. The tone was spot-on, providing relevant and practical information to assist media professionals in their careers and daily lives. The 'Look Up' installation was nothing short of spectacular, and provided a theme that lasted throughout the day."
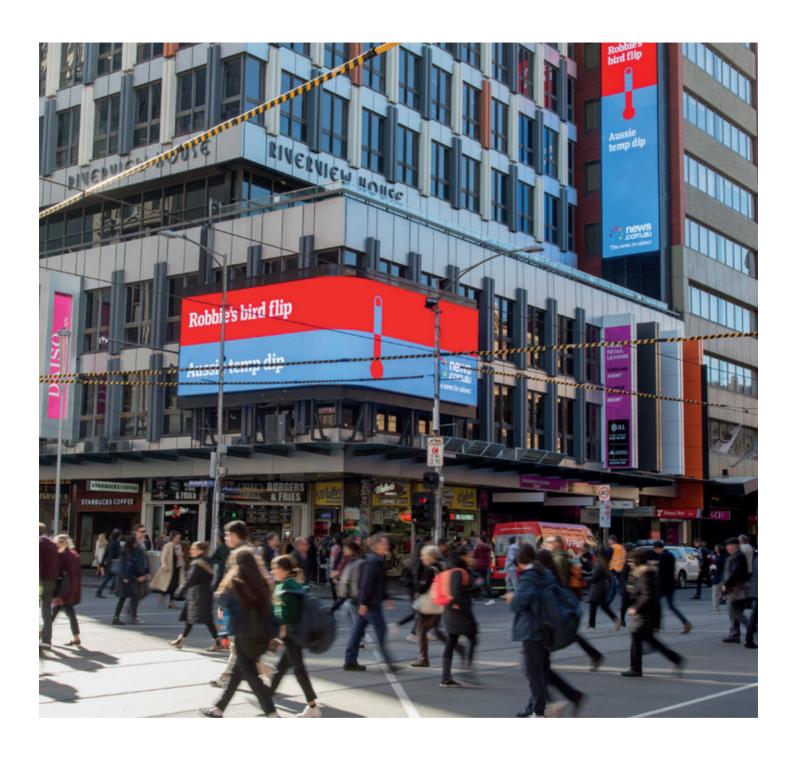
Clive Prosser, Director, **Advertising Week APAC**

'Look Up' thought leadership breakfast

In August, the OMA hosted a thought leadership breakfast as part of Advertising Week's debut conference in Australia. Over 130 attendees heard from Dr Fiona Kerr, renowned neural and systems complexity specialist, interviewed by Dr Norman Swan, founder of Tonic Health Media and host of ABC Radio National's Health Report. Dr Kerr and Dr Swan discussed the life-changing benefits that come with the simple act of looking up.

The audience learned how looking up and out at the world around is good for the brain, the body, relationships, and experiences of life. The event was a precursor to the 2019 national OOH campaign inviting Australians to Look Up.

"As an advocate of OOH, it was particularly pleasing to see such a varied collection of work put forward. We had examples of beautifully art directed and sophisticated creative going head to head with cheeky and irreverent copy that may not be as aesthetically pleasing but worked the format and was contextually perfect."

Bryan Magee, Managing Director, **Posterscope**

2018 Creative Collection winners

Grand Prix: *The News in Colour* by news.com.au (pictured left)

Best creative execution

Quarter 1
React for Nike
by Nike *p.11*

Quarter 2
The News in Colour
by news.com.au *p.26*
(2018 Grand Prix)

Quarter 3
Yoplait "Y" Words
by Lion Drink and Dairy *p.6*
Quarter 3 Grand Prix winner

Quarter 4
Bumblebee
by Paramount Pictures *p.11*

Best traditional use of the OOH medium

Quarter 1
KFC Buckethead Army
by KFC

Honourable mention
Open Australia
by Coopers

Don't believe in never
by Australian Football League *p.15*

Quarter 2
Cenovis Multivitamins
by Sanofi Aventis

Honourable mention
Move with Momentum
by Momentum Energy *p.33*

Quarter 3
*Bananas
(Peel Good Feel Good)*
by Horticulture Innovation Australia

Quarter 4
Myer rebrand
by Myer

Up Santa's Chimney
by Koala mattress

Best use of a special build

Quarter 1
Australian ethical super
by Australian ethical super

Quarter 2
Everyone loves their winter Woolies
by Woolworths *p.8*

Quarter 3
*The Experimental Series –
Glenfiddich*
by Glenfiddich

Quarter 4
Jeep Cherokee
By Fiat Chrysler
Automobiles Australia *p.21*

Best use of technology and innovation

Quarter 1
#SoMuchYay – Mardi Gras 2018
by ANZ and Twitter

Quarter 2
*Everyday Banking with
ANZ spending app*
by ANZ

Honourable mention
*Nike React – Point of Sale
data feed* by Nike

Quarter 3
Mt Hothman Snow Cam
by Mt Hothman Skiing Company

Quarter 4
All Eye Want for Christmas
by Jetstar *p.21*

Growing strong communities

The Out of Home (OOH) industry has built, and maintains, more than 17,000 items of community infrastructure valued at $352M including: bus shelters, kiosks, park benches, and pedestrian bridges. With an estimated $1 out of every $2 in revenue being returned to governments and other landlords in rent and taxes, the industry also helps to build better cities through an ongoing investment in Australia's public infrastructure and technology.

Industry campaigns

The OMA unites the industry several times a year to focus on causes with national impact that positively showcase the power of Out of Home (OOH). In 2018, there were three major campaigns, as well as a number of individual campaigns supported by members. *p.54*.

National missing persons week

For ten years, the OOH industry has supported National Missing Persons Week (NMPW), and the last four years have been in partnership with the Australian Federal Police (AFP). In 2018 the industry donated $1.7M in advertising space and services

in support of NMPW's 30th anniversary. This was the largest donation of advertising in the history of the partnership. Over the week of 5–11 August, it is estimated that 11M people saw the campaign.

Community commitment

OMA members provide media and services to a range of arts, sports and charitable organisations across the country. In addition, OOH is one of the most trusted channels to broadcast government and community awareness messages, including road safety, public health, and community service campaigns. OOH advertising delivers essential community education to

citizens and, in the case of digital OOH, in real-time.

It is estimated that the industry donated media space and advertising production valued at nearly $69M and

"**This year marked the 10th anniversary of the Out of Home industry's support and saw the largest donation received throughout the history of the partnership estimated at 5,000 signs Australia wide. The generous donations by the Out of Home industry have helped project the National Missing Persons messaging and long-term missing person profiles to all corners of Australia – for that we are incredibly grateful.**"

– Trish Halligan, Acting Coordinator Outreach, Prevention and Engagement, **Australian Federal Police**

The National Geographic Photo Ark

A case study

The OOH industry in Australia joined a global partnership between the National Geographic Society and OOH industry bodies across 20 countries to support the Photo Ark project. Combining the power of photography and the impact of the OOH channel, awareness was raised for animal species at risk of extinction.

The international campaign was launched in Australia on Endangered Species Day, 18 May. Powerful images ran across digital signs in NSW, QLD, SA, VIC and WA, raising awareness about animal populations in decline all over the world. Its aim was to inspire people to learn how to help protect them.

The campaign was supported by eight companies: Adshel, APN Outdoor, Bishopp Outdoor Advertising, goa, JCDecaux, oOh!media, Outdoor Systems and QMS Media.

The National Geographic Photo Ark, led by photographer Joel Sartore, is a multi-year endeavour to document every species living in zoos and wildlife sanctuaries. It aims to encourage action through education, and to help save wildlife by supporting on-the-ground conservation efforts.

Sartore's breathtaking portraits motivate people to care about these animals and to take action while there's still time to protect them. To date, Sartore has documented 8,000 species, putting him two-thirds of the way toward completing the Photo Ark, which he estimates will include portraits of more than 12,000 species.

DrinkWise

A case study

In 2018 the Out of Home (OOH) industry tapped into a well-known fact: we pass down more than just our looks to our children.

This joint industry campaign, in partnership with DrinkWise, brings the message to life by encouraging adult Australians to think about how they consume alcohol, especially in front of their children. The OMA will work with DrinkWise to roll out this campaign over the next three years.

A ten year research study from DrinkWise shows that Australians are drinking more responsibly, more moderately, and the rates of excessive drinking, and underage drinking, are decreasing. The industry is taking an active role in supporting this trend, with the 'Children can inherit more

than your looks' campaign, aiming to raise awareness about how parents can role model responsible drinking behaviour around children.

As the number one 'always on' broadcaster in Australia, reaching 93% of the population, the industry is committed to using our channel's superpowers to influence behavioural change. The DrinkWise campaign was valued at over $2.4M and displayed on 1,300 signs around Australia, reaching 11M people across two weeks.

A post-campaign survey found that 58% of those who saw the advertisements were more conscious of how their children perceive them when drinking, and 32% discussed the advertisement with family members or friends.

Community commitment (continued)

supported over 200 beneficiaries including arts, sports, and charitable organisations across the country.

Road safety and community service

As urban growth accelerates, OOH and DOOH advertising are perfectly positioned to reach the public at every stage of their journey: where they live, work, shop, and socialise. DOOH, integrated WiFi, and time and place-sensitive messaging, not only allows brands to better engage and interact with consumers, but also enable real-time communication of public safety announcements that inform the community.

Additionally, the OMA and its members regularly partner with local councils, government departments and other community organisations to stage significant community campaigns around health and safety. There were several community-building initiatives delivered in 2018, including:

- Bishopp partnered with Queensland Fire and Rescue Service to support fire safety messaging

- goa continued its partnership with Brisbane City Council broadcasting community safety announcements and Amber Alerts across its digital network

- oOh!media worked with government agencies in all states to promote a number of health and road safety messages including Breast Screening in Queensland and Be Truck Aware and Motorcycle Safety in New South Wales

- Paradise Outdoor Advertising continued its long-standing partnership with the Queensland Police, running campaigns to raise awareness of driver fatigue, speeding, and rail safety

- QMS Media provided support to a range of health and safety campaigns including Crime Stoppers with the Australian Federal Police, and campaigns for the Queensland Police, the Transport Accident Commission of Victoria, and the Road Safety Commission

- TorchMedia partnered with the Victorian Government to promote the public transport safety 'You Can See' campaign, and with the New South Wales Government to raise awareness of the flu season, and messages for the Hey Tosser campaign.

"I wanted to say thank you once again for the donation QMS made to our OzHarvest Fight Food Waste campaign. The creative execution manifested perfectly on your OOH placements and gave the campaign incredible reach and impact – the perfect complement to our online presence."

Ashley Killeen, Head of Marketing and Communications, **OzHarvest**

Big Screen Video's War on Waste

A case study

Big Screen Video is committed to creating social change through business. Its latest venture delves not only into tackling Australia's 'War on Waste' but also providing opportunities for people with a disability. Determined to find a sustainable solution for its LED screens once decommissioned, recycling of the electronic waste was the most logical step.

Electronic Recycling Australia, based in Underdale, South Australia, employs able bodied and supported workers through Minda, a fellow South Australian organisation supporting those living with a disability. Big Screen Video's first test project was completed through the facility, decommissioning a decade old screen. The facility is able to recycle all circuit boards, moulded plastic, bailing steel and plastic, with the only unrecyclable component being rubber – a material that has not featured on Big Screen Video's panels for a number of years. The current percentage of recyclable material on the older screens is 95%. When newer screens reach their end of life, the percentage of recyclable material will increase because the use of rubber has declined over the last few years.

"We have a number of social conscience initiatives within the company, and this latest project is something we hope will really set the standard for the LED industry" says Paul Ellery, CEO, Big Screen Video.

Road safety and community service (continued)

The OMA continued to work with the Australian Road Research Board (AARB) on a major research project into driver behaviour in the presence of digital signs. The report built on the Main Roads Western Australia research report that found that drivers drove better in the presence of a digital sign.

The OMA's study with ARRB was conducted over four weeks, and monitored two separate intersections in Queensland, each without a digital sign and then with a digital sign. The research showed that the presence of a digital sign had the effect of focusing drivers' attention on the road rather than distractions within the car. The findings and full report will be rolled out to members and government in early 2019.

Environment and sustainability

OMA members are committed to environmentally sustainable solutions, seeing them as beneficial for both the community and their business.

Actions undertaken by the industry focused on waste-reduction, closed-loop production and energy neutrality include:

- Programs to reduce waste generation, including paperless offices and producing lighter-weight materials for billboards skins, have resulted in almost 40% less PVC in production and waste

- Recycling or repurposing up to 90% 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 life-spans 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.

Setting the bar high

As Out of Home (OOH) broadcasts 24/7 and is seen by 93% of the population every day, OMA members set a high bar for self-regulation.

Community commitment

Out of Home (OOH) is an industry that strives to not only meet but exceed community expectations. This year, the OMA updated its Placement Policy and launched a new School Mapping Tool to ensure that products illegal for sale to minors are not advertised within 150m of primary and secondary schools.

Accurately mapping the locations and boundaries of almost 30,000 schools across NSW, QLD, SA, VIC and WA, the School Mapping Tool has been designed as an additional security measure, ensuring OOH advertisements are safe for both the advertiser and the public.

This innovation comes at a time when advertising content is under the microscope and brand safety is a major concern for advertisers. Programmatic selling online means placement mistakes can happen quite easily with all advertising channels. For OOH the risk is much smaller, but given it reaches 93% of the Australian population each day, who see on average 30 OOH ads, it's important that the industry proactively finds and embraces solutions that keep brands safe.

Self-regulation and advertising content

OOH is the ultimate broadcaster to the largest audience, which includes people of every age, race, gender and religion. As such, it is incumbent on the industry to meet the self-regulatory codes that guide the content of OOH signs.

Working alongside Ad Standards, the OMA supports the complaints procedure. The OMA also works with the Australian Association of National Advertisers (AANA), The Communications Council and the Alcohol Beverages Advertising Code (ABAC) Scheme to ensure that members only display advertising that meets prevailing community standards and complies with the self-regulatory codes.

The OMA pre-vetted 377 pieces of advertising creative submitted by members, rejecting 69 and proposing modifications to 38 (about 10% of all those received).

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 endorses the display of advertising that adheres to the following 17 self-regulatory advertising industry 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

The OMA reviewed 377 pieces of advertising creative this year.

In addition to its Copy Advice Service, the OMA offers a Concept Advisory Service, which provides advertisers and creative agencies free advice at the early stage of a campaign's development to help determine the suitability of content for OOH advertising.

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 Concept Advisory Service helps eliminate the likelihood of a breach due to content by determining whether the proposed advertisement:

– is discriminatory, uses sexual appeal appropriately, adheres to public safety

– contains violence that cannot be justified in its context

– uses language suitable for a broad audience.

Complaints

The majority of OOH advertisements do not receive community criticism or complaint, and of those that do, most are found to not breach any codes. OMA members have gone from 8 breaches in 2011 (before our Content Training Program commenced) to 12 breaches in total across the following seven years, and none in 2018. This is the record of a mature industry that takes its social responsibility seriously and understands the role it plays in the public domain.

Better regulation

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

Australia's robust system of self-regulation guides the content displayed on OOH signs. The design, location, and operation of signs, however, 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 working relationships with State Road and Planning Authorities, ensuring that regulations for roadside signage are safe, flexible, and evidence-based.

The OMA works with state and local governments to ensure that guidelines are not overly restrictive, allowing flexibility for digital signage to offer more utility and urban renewal to local precincts into the future.

In 2018, the OMA prepared submissions for the following:

– Australian Competition and Consumer Commission (ACCC) Digital Platforms Inquiry

– Alcohol Beverages Advertising Code (ABAC) Review

– Darwin City Council

– Department of Transport and Main Roads, Queensland

– Moreland City Council Planning Scheme Amendment C169

– Planning Scheme Amendment C308 Central City and Southbank Urban Design

– Queensland Department of Planning

– Roads and Maritime Services, NSW

– Standards Australia: Outdoor Lighting Review

– Select Committee into the Obesity Epidemic in Australia

– Therapeutic Goods Administration (TGA) Advertising Code

Code of Ethics

OOH is a powerful media channel. A prominent fixture in the Australian urban landscape, it can't be skipped, blocked, muted or fast-forwarded. This ubiquity 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.

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

Accolades

The Out of Home (OOH) industry aims high. In 2018, OMA staff and members received national and international accolades.

International recognition

Tess Phillips, OMA General Manager, was recognised as a Rising Star by the Federation Publicité Exterieur (FEPE) International at its annual global Out of Home (OOH) association Congress, held in June in Sorrento, Italy.

National recognition

2018 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 2018, OMA members claimed five awards at the event. Congratulations to the following individuals and sales teams who were recognised:

Media/Owner category

- Western Australia Sales Team of the Year – APN Outdoor

Outdoor/cinema category – sales person of the year

- Queensland – Renee Jonsen, APN Outdoor
- South Australia – Maddy Shopov, oOh!media
- Victoria – Ben Peel, oOh!media
- Western Australia – Damien Bodestyne, APN Outdoor

2018 B&T Awards

- Media Sales Team of the Year – Adshel

2018 OMA Industry Awards

The Industry Awards acknowledge and celebrate individuals for their outstanding contribution to the OOH industry. Presented every two years, nominations are accepted from the entire membership and voted by the Board.

The following people were celebrated for their contribution to the OOH industry:

- Steve Bovey, QMS Media, Excellence in Innovation
- Andrew Hines, APN Outdoor, OMA Industry Award
- Nicky Kiel, APN Outdoor, Rising Star Award
- Stephen Luck, Adshel, Outstanding Service Award

"The new Rising Star award is a timely acknowledgement that change is today's story in OOH and young people in the industry are driving that change. They're the future of this great medium and Tess is an impressive representative of this new generation."

Tom Goddard, International President, **FEPE**

Right: FEPE Rising Star award winner, OMA's General Manager, Tess Phillips

Below: OMA Industry Award winners with the Chairman and CEO. Left to right: Steve O'Connor (Chairman), Andrew Hines, APN Outdoor, Nicky Kiel, APN Outdoor, Charmaine Moldrich (CEO), Stephen Luck, Adshel, and Steve Bovey, QMS.

Measuring success

In 2018, Out of Home (OOH) net revenue rose 10.8% to an all-time high of $927.2M.

Record revenue results

The OMA generates performance reporting for the Out of Home (OOH) industry through the compilation of revenue results and share of advertising spend for its members, which comprise approximately 80% of the revenue generated by the channel.

Once again, OOH revenue reached an incredible high, experiencing its ninth year of consecutive growth. Posting a 10.8% increase on net revenue year-on-year in 2018, industry revenue reached an all-time high of $927.2M, up from $837M in 2017.

In 2018, the demand for immediacy and flexibility continued to drive growth in digital Out of Home (DOOH) representing 52.3% of total OOH revenue, up from 47.3% in 2017.

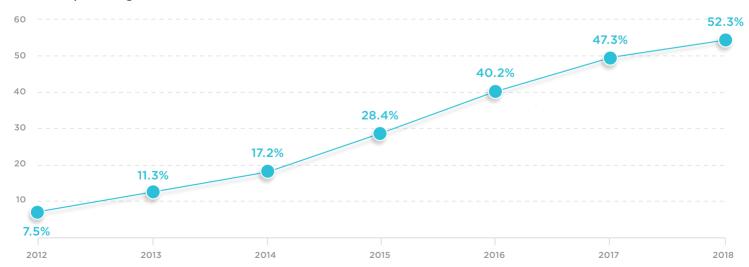**Revenue results ($M) 2012 – 2018** —— Total OOH original —— *Total OOH revised

Total OOH revenue

DOOH as a percentage of total OOH revenue

* Numbers were revised to reflect changes in OMA membership, allowing direct comparison in revenue year-on-year.

Performance by quarter 2018

OOH revenue by quarter ($M) 2016 – 2018

2018

Q1	$203M
Q2	$225.5M
Q3	$221.1M
Q4	$277.5M

2017

Q1	$186.9M
Q2	$197.5M
Q3	$199.9M
Q4	$252.8M

2016

Q1	$176.7M
Q2	$184.6M
Q3	$186.4M
Q4	$241.8M

0   50   100   150   200   250

- First quarter net revenue increased by 8.6% to $203M, up from $186.9M in 2017
- Second quarter net revenue increased by 14.2% to $225.5M, up from $197.5M in 2017
- Third quarter net revenue increased by 10.6% to $221.1M, up from $199.9M in 2017
- Fourth quarter net revenue increased by 9.8% to $277.5M, up from $252.8M in 2017

Performance across formats and locations 2018

OHH revenue across formats and locations ($M) 2016 – 2018

Legend: 2018 | 2017 | 2016

Category	2018	2017	2016
Roadside billboards	$376.3M	$332.6M	$296.4M
Roadside Other	$256.9m	$237.4M	$230.4M
Transport	$159.4M	$135.0M	$136.3M
Retail/lifestyle/other	$134.6M	$132.2M	$126.4M

- Roadside billboards (over and under 25 square metres) $376.3M
- Roadside other (bus/tram externals, small format, street furniture) $256.9M
- Transport (including airports) $159.4M
- ^Retail/Lifestyle/Other $134.6M

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 in doctors' surgeries and medical centres.

43

Percentage share by media of total advertising spend

CINEMA
.9%

OOH
6.2%

PRINT*
12.7%

ONLINE
48.1%

$15 billion

TV**
21.6%

RADIO
8.0%

PAY TV
2.6%

	2014	2015	2016	2017	2018
OOH	5.1	5.3	5.7	5.9	6.2
Cinema	.8	.9	.9	.9	.9
Print*	18.8	16.3	13.0	13.2	12.7
TV**	29.3	26.7	24.2	23.1	21.6
Pay TV	4.1	4.0	3.5	3.2	2.6
Radio	9.0	8.7	8.3	8.1	8.0
Online	32.9	38.3	44.4	45.5	48.1

Source: CEASA (prior to 2017 this report excluded Classified and Directories for Print and Online, since 2017 only Online Classified have been excluded).

* Print changed reporting in 2017 to include Digital and Classifieds advertising revenue. Prior to 2017, Classifieds revenue was reported separately. In 2016, Classifieds made up 12.1% of the total print revenue figure.

** TV includes Metro and Regional 2011 to 2015 and in addition AVOD (Advertising Revenue from Video on Demand) for the first time in 2016. AVOD was 0.3% of total advertising spend in 2016.

Top 10 OOH sectors

2018	2017	Top 10 sectors	All media			OOH	
			2018 ($M)	2017 ($M)	YOY%	2018 ($M)	% Share
1	1	Retail	1,737.8	1,895.3	-8%	132.5	8%
2	3	Motor Vehicles	785.3	932.1	-16%	95.6	12%
3	2	Entertainment & Leisure	556.5	596.4	-7%	83.6	15%
4	4	Finance	530.8	517.8	3%	76.5	14%
5	5	Communications	430.3	431.8	0%	68.7	16%
6	6	Food	247.2	326.8	-24%	55.2	22%
7	7	Travel/Accommodation	735.0	784.3	-6%	51.1	7%
8	8	Media	289.4	247.3	17%	43.4	15%
9	15	Gambling/Gaming	274.2	260.0	3%	42.8	16%
10	9	Beverages-Alcoholic	112.9	83.0	36%	42.1	37%

Top 10 OOH advertisers

2018	2017	Top 10 advertisers	All media			OOH	
			2018 ($M)	2017 ($M)	YOY%	2018 ($M)	% Share
1	15	Unibet Australia Pty Ltd	20.0	6.3	69%	14.6	73%
2	3	McDonalds Family Restaurants	66.9	80.5	-20%	14.1	21%
3	10	Woolworths Supermarkets	86.9	71.1	18%	13.8	16%
4	61	Nissan Motor Co (Aust) P/L	28.9	14.7	49%	12.9	45%
5	4	Optus	38.0	30.8	19%	11.9	31%
6	17	Stan Entertainment Pty Ltd	27.4	40.4	-47%	10.1	37%
7	71	Uber	28.4	8.4	70%	10.1	36%
8	11	Foxtel	57.8	47.6	18%	10.0	17%
9	2	Mondelez International	22.3	39.5	-77%	9.9	44%
10	1	Commonwealth Bank	35.1	44.7	-27%	9.7	28%

Source: Nielsen Ad Intel 2018; Nielsen reserves the right to adjust ranking retrospectively.

Teamwork

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

OMA membership

With an ever-increasing share of the media pie, OMA members work together to build the industry's profile through excellence in operation.

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 the approval from the OMA's Board of Directors.

OMA membership is divided into three categories:

Media Display Members: these outdoor media companies (*p.50*) advertise third-party* products across all categories in the OOH sector, including: buses, trams, light rail, pedestrian bridges, billboards and free-standing advertisement panels, on street furniture (e.g. bus/tram/light rail shelters), bus stations, railway stations, shopping centres, office buildings and lifts, cafes, universities and airport precincts.

Non-Media Display Members: these production and installation companies (*p.52*) include printers, installers, maintenance fabrication companies and other producers of OOH billboard skins and vinyls.

Asset Owners: these companies (*p.53*) own the property where OOH advertising stands.

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

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
- Participate in community partnerships

Standards

- Assistance with industry standards 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

Finance committee

The Finance Committee provides strategic advice on all OMA and MOVE financial matters. There were three meetings of the committee in 2018.

- Peter Cargin, QMS Media (resigned in June)
- Chris Hunt, Adshel (resigned in March)
- Philip Knox, APN Outdoor (resigned in August)
- Sheila Lines, oOh!media (commenced in June)
- Charmaine Moldrich, OMA (Chair)
- Andrew Nye, Adshel
- Brendan O'Neill, JCDecaux
- Kate Solomon, QMS Media (commenced in September)
- David Watkins, APN Outdoor (resigned in March)

Sales and marketing committee

The Sales and Marketing Committee develops effective strategies for all ongoing and new marketing and communications activities undertaken by the OMA on behalf of the industry. There were five meetings of the committee in 2018.

- Michaela Chan, oOh!media (resigned in August)
- Emily Coe, Bishopp Outdoor Advertising
- Alex Cowen, QMS Media
- Kirsty Dollisson, TorchMedia (Chair)
- Max Eburne, JCDecaux
- Nick Errey, oOh!media
- Matt Fisher, TorchMedia
- Ti-Ahna Firth, OMA
- Louisa Howard, OMA
- Julie Jensen, OMA
- Jodie Koning, Adshel
- Sara Lappage, QMS Media
- Emily Lewis, TorchMedia
- Bruce Mundell, oOh!media
- Marie Norman, APN Outdoor
- Charlotte Valente, APN Outdoor (resigned in August)
- Essie Wake, JCDecaux
- Christian Zavecz, QMS Media

Regulatory Affairs committee Queensland

The Regulatory Affairs committee oversees all regulatory matters affecting the industry. The committee held three meeting in 2018.

- Kelly Ainley, Adshel
- Hulwina Azmi, APN Outdoor
- Peter Bailey, Bailey Outdoor Advertising
- Anthony Baxter, Paradise Outdoor Advertising
- Brad Bishopp, Bishopp Outdoor Advertising
- Odette Ferreira, Adshel
- Emily Lewis, TorchMedia
- David Lovatt, oOh!media
- Mitch James, Paradise Outdoor Advertising
- Graham Johanson, oOh!media
- Melissa Maggs, goa
- Nick McAlpine, Bishopp Outdoor Advertising
- Siobhan Marren, OMA
- Tess Phillips (Chair), OMA
- Damian Potter, APN Outdoor
- Peter Reynolds, oOh!media
- Peter Savage, Savage Outdoor
- Rob Sharp, ADLED
- Chris Tyquin, goa
- Rod Taylor, Tayco Outdoor
- Adam Trevena, QMS Media
- Diana Woolridge-Jones, Adshel

Regulatory affairs committee

The Regulatory Affairs Committee oversees all regulatory matters affecting the industry. There were three meetings of the committee in 2018.

- Kelly Ainley, Adshel
- Luke Brett, oOh!media
- Michael Cali, oOh!media
- Bronwyn Clementson, APN Outdoor
- Noel Cook, oOh!media
- Odette Ferreira, Adshel
- Graham Johanson, oOh!media
- Trent Knudsen, Tonic Health Media
- Emily Lewis, TorchMedia
- Brad Lindsay, APN Outdoor
- Melissa Maggs, goa
- Alice Magon, oOh!media
- Tess Phillips, OMA (Chair)
- Siobhan Marren, OMA
- Damien Rath, APN Outdoor
- Blair Robertson, Daktronics
- Rob Sharp, ADLED
- Adam Trevena, QMS Media
- Andrew Tyquin, Outdoor Systems
- Brian Tyquin, Outdoor Systems
- Danielle Tyquin, Outdoor Systems
- Graeme Wooster, QMS Media
- Diana Woolridge-Jones, Adshel
- 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 2018.

- Glenn Badcock, JCDecaux
- 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
- Tess Phillips, OMA (Chair)
- Siobhan Marren, OMA
- Ajay Powell, APN Outdoor
- Craig Pritchard, Country Outdoor Signs
- Rosemary Roberts, oOh!media
- Blair Robertson, Daktronics
- Nigel Spicer, Cactus Imaging
- Peter Tyquin, goa
- Daniel Ward, USI
- Dom Weir, Coresafe
- Collin Willshire, Prime Signs

CORE committee

The CORE Committee assists with the design specifications for the new platform which will allow media agencies to request proposals from the OMA member companies and combine these proposals into a campaign. Agencies will then be able to confirm bookings and receive billing files and access to MOVE audience reports. CORE will be launched in 2019. The committee met five times in 2018.

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

MOVE industry user group

The Industry User Group (IUG) comprised senior planners and OOH buyers from major advertising agencies together with a MOVE Board representative, the OMA/MOVE CEO and MOVE staff. The IUG provided strategic advice and counsel about issues involving MOVE from the point of view of advertising planners, and ensured users' interests were at the forefront of MOVE and its development. There were two meetings of the IUG in 2018.

- Tione Blackley, Group M
- Craig Cooper, Starcom MediaVest Group
- Victor Corones, Magnaglobal
- Jo Dick, OMD
- Jackie Edwards, Magnaglobal
- Kylie Green, MOVE
- Peter Grose, Ikon Communications
- Grant Guesdon, MOVE
- Charmaine Moldrich, OMA and MOVE
- Andree Norbury, OMD Sydney
- Steve O'Connor, JCDecaux (Chair)
- Cassandra Thomas-Smith, Posterscope

MOVE technical committee

The 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 modeling matters. This includes data and software updates, and the modeling and technical developments used to derive OOH measurement results. There were twelve meetings of TECHCOM in 2018.

- Tara Coverdale, oOh!media
- Edwina Colquhoun, oOh!media
- Kylie Green, MOVE
- Grant Guesdon, MOVE (Chair)
- Sarah Hughes, Adshel
- Nicky Kiel, APN Outdoor
- Thomas Kim, APN Outdoor
- Justin Ko, MOVE
- Kevin Morrell, APN Outdoor

- Daniella Natoli, oOh!media
- James Nettlefold, QMS Media
- Adele Rose, JCDecaux
- Ashlee Ruff, APN Outdoor
- Jordana Sherlock, QMS Media
- Cristina Smart, JCDecaux
- Max Twemlow, JCDecaux
- Florence Wong, Adshel

OMA member companies

OMA membership increased from 37 in 2017 to 42 in 2018. Member companies represent approximately 80% of the Out of Home (OOH) industry in Australia.

Media display members

Adshel enables brands to engage and influence commuters where they work, live and shop. Wholly owned by HT&E, Adshel reaches 92% of Australia, 68 times a fortnight. A market-leader in innovation across buying models, digitisation, geo-targeting and audience expertise. Adshel has the scale, flexibility and creativity to precisely reach target audiences. Adshel was acquired by oOh!media in 2018.

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 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% of southeast Queensland each week. goa's mission is to ensure all of its experience, effort and investment are focused on getting clients noticed.

goa.com.au

APN Outdoor is a leader in outdoor advertising across Australia and New Zealand. With over 36,000 high-impact sites in iconic and influential locations, APN Outdoor connects advertisers with audiences in smarter, more impactful ways. APN Outdoor was acquired by JCDecaux in 2018.

Bishopp Outdoor Advertising commenced operation in 1993, and 25 years on has evolved into one of Australia's leading regional Out of Home advertising companies. The business has a total of 2500+ 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 global Out of Home media company with a consistent focus on providing high quality street furniture and Out of Home networks. The expansive suite of premium JCDecaux products, in key metropolitan areas, delivers advertisers unparalleled access to affluent audiences across Australia.

jcdecaux.com.au

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

mooh.com.au

oOh!media is a leading media company across Australia and New Zealand that creates deep engagement between people and brands through Unmissable Out of Home advertising solutions. oOh!media's connected offline and online ecosystem makes brands Unmissable across its diverse network of more than 30,000 locations, helping brands connect with their audiences through powerful and integrated, cross format campaigns. oOh!media's reach combined with data, insights, media planning tools and technological innovation gives advertisers an added layer of campaign intelligence. oOh! delivers the reach, optimisation, engagement and impact to connect and influence audiences anytime and anywhere.

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 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 Out of Home media company in Australia and New Zealand. Specialising in providing clients and agency partners with engaging, high-impact and innovative advertising solutions across its premium digital, outdoor and sports media network. Connecting audiences through multiple touchpoints and customised content, QMS provides multi-platform engagement across its portfolio of premium landmark digital and traditional billboards, exclusive street furniture and airport signs, and the largest on-field sports media network in Australia and New Zealand.

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

Tonic Health Media (THM) is Australia's largest health and wellbeing network, created by health professionals in collaboration with Out of Home media specialists. Its multi-channel network delivers messages that are geotargeted to patients and their carers while they wait for appointments and other health services, in a variety of locations, including pharmacies. Using digital Out of Home alongside print posters and brochures, THM connects advertisers and sponsors in 5,300 environments, reaching an audience of 15M Australians at the time and place where they are most engaged with their health and lifestyle.

tonichealthmedia.com.au

TorchMedia is a specialist transit Out of Home 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

Consolidation

In 2018, Adshel and APN Outdoor were purchased by oOh!media and JCDecaux respectively.

Adshel was wholly-owned by HT&E, and a market leader in innovation across buying models, digitisation, geo-targeting and audience expertise, with the scale, flexibility and creativity to precisely reach target audiences.

APN Outdoor had over 36,000 high-impact sites in iconic and influential locations, connecting advertisers with audiences in smart and powerful ways.

Non-media display members

ACTIVE
PART OF WPPAE

With over 30 years' experience, **ACTIVE** is the largest and most awarded end-to-end point-of-sale display and signage manufacturer across Australia and New Zealand. ACTIVE guarantees its clients get the most innovative solutions through a comprehensive suite of in-house services, capabilities, products and facilities, as well as ACTIVE's ongoing investments in state-of-the-art manufacturing technologies.

activedisplay.com.au

adled

ADLED is an Australian-owned, Queensland-based provider of large format digital billboard technology. It designs, constructs and provides asset management and maintenance for networks of digital advertising devices throughout Queensland and regional New South Wales. ADLED draws together experience from a number of companies, all of which have been operating in the OOH and construction industries for decades.

ss-signs.com.au

adstream

adstream is the fastest way to deliver print content globally, with more publisher-specific checks on print files than any other software. Instantly check, fix and send digital and print content to any media in the world, in seconds.

adstream.com.au

AYUDA

Ayuda is a global adtech business specialising in Out of Home. Their advertising technology is used globally by some of the world's largest Out of Home companies offering a seamless way to deliver digital Out of Home from one single-solutions provider. It includes an automated signage software for both static and digital screens, an end-to-end enterprise resource planning specially built for the Out of Home medium, a native ad-based digital signage platform, and a rich suite of programmatic offering to tap into new digital revenue streams and contemporary trading models.

ayudasystems.com

BIG SCREEN VIDEO

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

Cactus Imaging

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

CoreSAFE
work safety solutions

Coresafe has been providing trusted health, safety and environmental consultancy services to OMA members for 17 years.

coresafe.com

COSigns

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

cosigns.com.au

DAKTRONICS

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

gsp

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

HANLON INDUSTRIES

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

hanlonindustries.com.au

KEY

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

keysystemsww.com

MMT PRINT

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

Omnigraphics

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

PRIME SIGNS

Prime Signs is a premier Queensland sign company that excels in services including installation, maintenance, fabrication, digital signage, street furniture, as well as airport and service station specialty projects. Prime Signs remains family owned and run after 20 years in the industry and 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

Prismaflex is a leader in the industrial manufacture of advertising displays and wide format digital printing. With a focus on innovation, Prismaflex has over 25 years' experience with 40 patents in the service of displays and point-of-purchase.

prismaflex.com

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

rojopacific.com.au

Samsung inspires the world with innovative technology and the creativity and diversity of its people. Through a deep understanding of what people need and want, Samsung Electronics is committed to enriching its customers' lives, while contributing to social prosperity around the world and supporting a sustainable environment.

www.samsung.com/au

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

seedooh.com

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, out of home, online and broadcast channels.

techfront.com.au

From billboard installations, hoardings, truck signage, car and bus adhesive wraps, small banners, shop signage, window displays, sign maintenance, banner finishing services, steel fabrication, abseiling and everything else in between, **USI** does it all.

ultimatesigns.com.au

Asset Owners

APEX Digital is a leader in acquiring exclusive sites to develop both static and digital billboards. With over 20 years' experience in both the acquisition and advertising industry, Apex has built relationships in all facets to ensure smooth, timely and mutually beneficial developments. Working with a highly regarded team of professionals, Apex is committed to creating not only highly visible and impactful billboards, but architecturally designed billboards that serve as attention-demanding city landmarks.

apexdigital.com.au

Roads and Maritime Services is an operating agency within the Transport cluster delivering value for customers and the community by enabling safe and efficient journeys through NSW. Roads and Maritime develops advertising assets to support road, maritime and safety programs and initiatives. On 1 July 2019 Roads and Maritime was integrated into Transport for NSW.

rms.nsw.gov.au

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

XTD Limited has an adaptable system of internet-connected, large format LED video screens specifically designed for mass-transit rail environments. XTD – through its division, Contact Light – has developed a mobile technology that seamlessly and securely engages with digital Out of Home (DOOH) content. XTD focuses on developing DOOH hardware and software technology and growing screen networks. XTD has long-term operator contracts in Brisbane and Melbourne.

xtd.tv

Addendum

Arts, sports, and charitable organisations across the country supported by the Out of Home industry.

- AEIOU Foundation
- Allergy and Anaphylaxis Australia
- Amber Lawrence's Your Town, Your Tour
- Amy Gillett Foundation
- Anglicare Australia
- Anglicare Southern Queensland
- Art Gallery of NSW
- Australia Zoo Wildlife Warriors
- Australia and New Zealand Urogenital and Prostate Cancer Trials Group (ANZUP)
- Australian Cancer Research Foundation
- Australian Center for the Moving Image
- Australian Children's Music Foundation
- Australian Museum
- Australian National Maritime Museum
- Australian Red Cross

- B&T Women in Media Awards
- Bandaged Bear Appeal
- Barnardos Australia
- Barwon Health Foundation
- Bell Park Football & Netball Club
- Bernie Banton Foundation
- Bowel Cancer Australia
- Bravehearts
- Breast Cancer Network Australia

- Breast Cancer Trials
- Brisbane Festival
- Brotherhood of St Laurence
- Bundaberg and North Burnett Tourism

- Cancer Council Queensland
- CanTeen
- Capital Theatre Sydney
- Cerebral Palsy Alliance
- Cerebral Palsy Foundation
- Chain Reaction Challenge Foundation
- Childers Festival
- Children's Cancer Foundation
- Children's Hospital at Westmead
- Coeliac Australia
- Connor's Run
- Cure Brain Cancer Foundation
- Cure Cancer Australia Foundation

- Danny Green's Stop the Coward Punch Campaign
- Documentary Australia Foundation
- DonateLife Network
- Dracula's Melbourne
- DrinkWise
- Drought Angels
- Dry July Foundation

- Earth Hour
- Eating Disorders Families Australia

- Festival of Dangerous Ideas
- FightMND Big Freeze 4

- GenU Karingal St Laurence
- Gippsland Jersey Milk Company
- Givemotion
- Give Where You Live Foundation
- Golden Octopus Foundation

- Heart of Gold International Short Film Festival
- Heartkids Australia
- Hospital Health Care Activities
- Humpty Dumpty Foundation

- Invictus Games
- It's a Bloke Thing Foundation

- Jean Hailes for Women's Health
- Jeans for Genes Day

- Kidsafe Australia

- Leila Rose Foundation
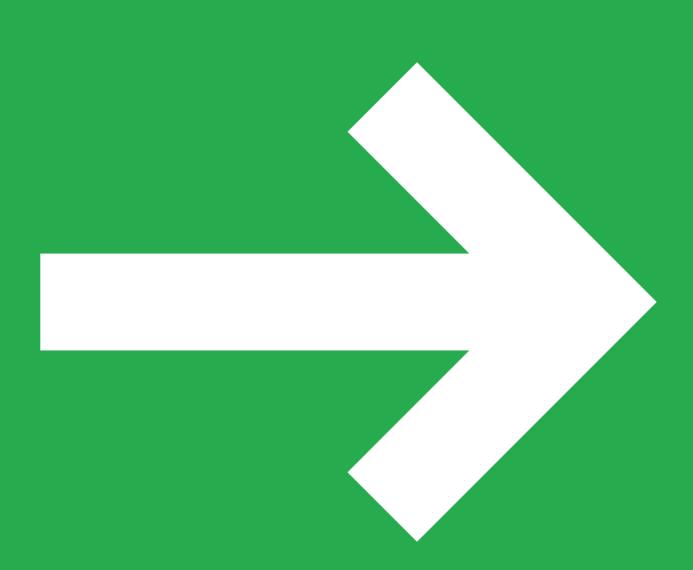- Leukaemia Foundation
- Leukaemia Foundation Queensland

- Lifeline
- Lions Clubs Australia
- Little Hero's Foundation
- LIVIN
- Lockyer Valley Business Awards
- Long Term Fatigue
- Lung Foundation Australia

- Mackay Region Rotary Clubs
- Make A Wish Foundation
- Manly Inflatable Race
- Mates4Mates
- McDonald's Stomp the Crack and Beef Capital Musicians Care Concert
- McGrath Foundation
- Melbourne City Mission
- Michael Tynan Memorial Challenge
- Motor Neurone Disease Australia
- Movember Foundation
- Mundipharma
- Murdoch Children's Research Institute
- Museum of Applied Arts and Sciences
- Museum of Brisbane
- Museum of Contemporary Art

- NAIDOC Week
- National Breast Cancer Foundation
- National Burns Awareness Month

- National Gallery of Victoria
- National Geographic Photo Ark
- National Institute of Integrative Medicine

- Oaktree Foundation
- Odd Socks Day
- Odyssey House Victoria
- One Girl: Educating Girls in Africa
- Ovarian Cancer Research Foundation
- OzHarvest

- Pause4Parkinson's
- Perth Airport
- PETA Australia
- Pig Day Out
- Pink Hope
- Polished Man for ygap
- Priceline Sisterhood Foundation

- Qantas Drought Relief
- Queensland Art Gallery & Gallery of Modern Art
- Queensland Ballet
- Queensland Institute for Urban Indigenous Health
- Queensland Performing Arts Centre
- Queensland Theatre Company
- Quandamooka Festival

- ReachOut.com
- Red Boot Race Day
- Red Frogs Australia
- Red Nose Day
- Redlands Returned and Services League of Australia
- Rett Syndrome Research Trust
- Road Safety Commission for the Western Australia Police

- Robert Connor Dawes Fund
- Ronald McDonald House Charities Australia
- Ronald McDonald House South East Queensland
- Royal Children's Hospital
- RSPCA Australia
- Rum City Rods Car Show
- R U OK? Day

- Safe Steps Family Violence Response Centre
- Save the Koalas
- Scouts Queensland
- Sculpture by the Sea
- Shake It Up Australia Foundation
- Smiling Mind Foundation
- St Vincent de Paul Society
- Sony Foundation Australia
- Stroke Foundation Australia
- Sunnybank Hills State School
- Surf Life Saving Australia
- Sydney Children's Hospital Foundation
- Sydney Festival
- Sydney Film Festival
- Sydney Opera House

- Taronga Conservation Society Australia
- Thomas Kelly Youth Foundation
- The Arts Centre Melbourne
- The Big Issue
- The Fred Hollows Foundation
- The Heart Foundation
- The Hunger Project Australia
- The Smith Family
- The Royal Children's Hospital
- The Salvation Army
- Tour de Cure

- Toowoomba Hospital Foundation
- Reclaim the Night for Toyah Cordingley Awareness
- Twenty10 incorporating GLCS NSW

- Ulysses Club Annual Toy Run
- UNICEF Australia
- UnLtd

- Variety Australia
- Vision Australia New South Wales
- Visit Victoria
- Volunteer Marine Rescue

- White Ribbon Australia
- Wings for Life World Run
- Withcott Litter Prevention
- WOMADelaide Festival
- World Wildlife Fund Australia
- World Wildlife Fund for Nature

- Youngcare
- Youth Futures Western Australia

GOVERNMENT

- Australian Federal Police

- Brisbane City Council

- City of Bunbury
- City of Gold Coast
- Crime Stoppers Australia
- Crime Stoppers Queensland

- Darling Downs West Crime Stoppers

- Gladstone Regional Council
- Government of Australia
- Government of New South Wales
- Government of South Australia
- Government of Queensland
- Government of Victoria
- Government of Western Australia

- Ipswich City Council

- National Museum of Australia
- National Missing Persons Week for the Australian Federal Police

- Public Transport Authority Victoria
- Public Transport Authority Western Australia

- Queensland Fire and Rescue Service
- Queensland Department of Transport and Main Roads
- Queensland Police Citizens Youth Club

- Somerset Regional Council
- South Australian Department of Planning Transport Infrastructure

- Transport for New South Wales

- Victoria Police Blue Ribbon Foundation
- Victorian Transport Accident Commission
- VicRoads

- Western Downs Regional Council
- Western Australia Public Transport Authority

Emerging technologies are facilitating the industry to move from a static-only provider to a broadcasting communications channel. It's a dramatic time for the industry, to underpin amazing, fast and flexible advancements with sound self-regulation and considerable contributions to the community.

Outdoor Media Association
Suite 504, 80 William Street
East Sydney, NSW 2011
T 02 9357 9900
info@oma.org.au
oma.org.au