IT’S ABOUT GROWTH
“2015 was the sixth consecutive year of revenue growth and a pivotal year in Out-of-Home, with the announcement of two new data-driven initiatives that will supercharge Outdoor into the future. We also renewed focus on our relationships with all levels of government. All this bodes well for continued future growth in 2016 and beyond.”

CHARMAINE MOLDRICH, CEO, OMA & MOVE
The Outdoor Media Association (OMA) is the peak national industry body representing most of Australia's Out-of-Home (OOH) media display companies and production facilities, as well as some media display asset owners.

The OMA operates nationally and prior to July 2005, traded as the Outdoor Advertising Association of Australia (OAAA). It was first incorporated in 1939. The OMA is governed by a Board of Directors who are elected by the membership.

Members of the OMA adhere to an industry Code of Ethics (pages 56 and 57) to ensure they operate their businesses responsibly and abide by the industry's regulatory framework.

OMA media display members advertise third party* products on both digital and static signs across a variety of OOH formats and locations; airports, bicycle stations, billboards, buses, bus stations, cafes, doctors’ surgeries, free-standing advertisement panels, medical centres, office buildings and lifts, pedestrian bridges, railway stations, shopping centres, taxis, trains, trams, universities and street furniture (bus/tram shelters, public toilets, telephone booths and kiosks).

OOH advertising is always on, delivering messages 24 hours a day, seven days a week. It is ubiquitous, innovative, entertaining and effective: it is one of the ways people interact with their cities and communities.

Detailed descriptions of OMA Member Companies can be found on pages 50 to 53.

*Advertising in which the advertisement is not associated with the premises. That is, where a land or asset owner allows an Outdoor media display company to display an advertisement for a third party company or product.
ABOUT MOVE

MOVE (Measurement of Outdoor Visibility and Exposure) is a proprietary limited company that has the sole purpose of managing and administering the Out-of-Home (OOH) industry’s audience measurement system.

MOVE is governed by a Board of Directors in accordance with the MOVE shareholder agreement.

The culmination of years of work and over a $10 million investment by the industry, MOVE was designed to simplify the planning and buying of OOH advertising.

Since its 2010 launch, MOVE has been continuously updated. It is the only OOH audience measurement system in Australia to be endorsed by the OMA, the Media Federation of Australia and the Australian Association of National Advertisers. In 2015, the number of advertising faces MOVE measured increased and its software functionality was enhanced. MOVE measured nearly 90% of the faces in the five major capital cities – Adelaide, Brisbane, Melbourne, Perth and Sydney. The number of locations measured by MOVE has also seen a massive increase. For example, MOVE now measures 504 shopping centres, a 236% increase from its launch in 2010. This scenario is typical across the OOH industry, where development in existing Outdoor formats by MOVE members is creating more opportunities for clients to connect with customers.

MOVE MISSION
To provide the highest quality service to all MOVE users by maintaining the integrity and accuracy of the audience measurement data published, and to ensure the MOVE system remains accessible, relevant and user-friendly.

MOVE PARTICIPANTS
MOVE has more than 1,800 registered users and 58 agencies that log on to its web-based system. In 2015, the following OMA member companies had their advertising faces measured by MOVE:

- Adshel
- APN Outdoor
- Bishopp Outdoor Advertising
- goa
- iOM
- JCDecaux
- Metrospace Outdoor Advertising
- oOh!media
- Outdoor Systems
- QMS Media
- TorchMedia

ACCURATE MEASUREMENT
MOVE measures over 73,800 advertising faces in Australia’s five major capital cities. MOVE produces audience measurement results for any combination of formats or tailored packages. As well as providing results numerically, an in-built mapping functionality visually displays the reach of a campaign against the chosen demographic and market/s. MOVE enhances the standard measurement of target audiences, or Opportunity To See, by reporting the active audiences through Likelihood To See. A program of support and development continued in 2015, which saw updates to the data and improvements in software functionality.

DATA UPDATE
The annual data update saw OOH audiences increase by 3.4% across the mainland cities measured by MOVE (Adelaide, Brisbane, Melbourne, Perth and Sydney), and across the suite of OOH formats, marking a sixth consecutive year of growth. While traditional mediums continue to decline in both audience and market share, OOH has recorded consistent growth with the 2015 update recording 300,000 more people, on average, in the outdoor environment each day. Within the five mainland cities, OOH can now reach 12.2 million people who make 51 million trips on a daily basis.

The annual update reflects new data in the system including: updated Australian Bureau of Statistics population and employment levels across 17,800 separate travel zones; changes to transport infrastructure; changes to public transport routes; new signs; and updates to trip attractors in each travel zone, including shopping centres and school enrolments.

Also included in the 2015 update was the measurement of a new format – train externals – which is advertising placed on the outside of trains.

RESEARCH & INSIGHTS
Eleven new sets of insights from relevant research studies were released in The Anatomy of OOH series, which aims to delve into the power of Outdoor advertising to assist media planners, buyers, advertisers and others working in media to better use OOH in this changing media environment.

To access this information go to: www.oma.org.au/using-ooh/research-and-insights
DATA DEVELOPMENTS

The most comprehensive update to the MOVE software was launched in 2015 – geo-targeting – which allows media owners to build out sub-areas based on geographical information. The analysis of reach and frequency based on audience geography, household income and number of people living in the home means that media agencies now have the ability to create bespoke and targeted OOH media plans.

MOVE announced plans to integrate its data into emma (Enhanced Media Metrics Australia), in partnership with the independent research company IPSOS. This will enable emma subscribers to cross-tabulate emma’s demographic, attitudinal, lifestyle, media and product consumption variables against the formats measured by MOVE, giving media planners a deeper understanding of OOH’s reach within specific demographics.
On the fifth anniversary of MOVE, the Out-of-Home Industry (OOH) celebrates unprecedented growth.

Our industry’s capacity for vision, investment and innovation has led to its sixth consecutive year of revenue growth, posting an unprecedented 17% overall increase year-on-year. Revenue* reached $677.8 million in 2015, up from $579.3 million† in 2014, with digital OOH representing 28% of revenue.

In my second year as Chairman, I have seen the rapid uptake of digital signs: we do live in interesting and exciting times. While we have seen technology disrupt other traditional media channels, digital brings a variety of benefits to Outdoor – offering immediacy, flexibility and utility to both advertisers and governments.

The ability of one of the oldest advertising channels to grow with the times has been widely recognised, including in PwC’s Entertainment & Media Outlook 2015-2019, which describes the OOH industry as one of the success stories in an otherwise fragmenting media landscape. But digital innovation is only one part of the channel’s success. We are seeing brands of all varieties – from major digital players to traditional brands – turning to OOH to deliver audiences and cut-through.

Our audiences continue to grow. The annual MOVE update in 2015 saw OOH audiences increase by 3.4% – well ahead of 2.4% population growth – and this has been the trend for the past five years. It is the nature of our channel to develop with our audiences in urban areas. This is reflected in an 18% audience increase in the five years since MOVE was launched.

MOVE is a key driver of our success and to this end we are continuously improving its functions to make planning and buying OOH easier. In 2015, we introduced a suite of new features and tools allowing buyers to more effectively interrogate MOVE data. These improvements are made in collaboration with the users of the system – media agencies, with whom we have an ongoing dialogue through our Industry User Group. We built MOVE in partnership with the Media Federation of Australia and we have maintained that relationship and commitment to make MOVE responsive to its users’ needs.

Our audiences continue to grow. The annual MOVE update in 2015 saw OOH audiences increase by 3.4% – well ahead of 2.4% population growth – and this has been the trend for the past five years. It is the nature of our channel to develop with our audiences in urban areas. This is reflected in an 18% audience increase in the five years since MOVE was launched.

MOVE is a key driver of our success and to this end we are continuously improving its functions to make planning and buying OOH easier. In 2015, we introduced a suite of new features and tools allowing buyers to more effectively interrogate MOVE data. These improvements are made in collaboration with the users of the system – media agencies, with whom we have an ongoing dialogue through our Industry User Group. We built MOVE in partnership with the Media Federation of Australia and we have maintained that relationship and commitment to make MOVE responsive to its users’ needs.

The industry is acutely aware that OOH signs are in the public domain, and we work hard to honour the self-regulatory codes that we have developed or are signatories to. In 2015, the OMA introduced two new codes: the Political Advertising Guideline and the Digital Guideline, bringing the total number of codes we adhere to, to 15.

We take our social responsibility seriously and harness the impact and influence we deliver to brands, to effectively support and promote notable social and environmental messages. This year, we grew our joint-industry sponsorship of National Missing Persons Week (in its seventh year with the NSW Police) into a national partnership with the Australian Federal Police. There was also an additional $34 million in advertising support we gave to over 160 charitable and community causes.

OOH is more than a channel providing advertising signs; we believe we can be an ally to cities and inform a city’s character, being strategically placed where people live, shop, socialise, travel and work. This idea, that we can provide utility to cities as populations grow led us to host an Urban Design Workshop in Sydney. The workshop invited government and industry to start the conversation about OOH’s potential role in providing smart city solutions that help people to interact with, and navigate, their city.

Safety of our signs is always a major consideration. In 2015, we published a peer-reviewed academic paper based on the driver behaviour research we conducted over the past five years. The results showed that driver distraction is not impacted by signs or affected dangerously by signs.

As our channel grows, it becomes even more imperative that we encourage and celebrate the power the humble poster has in making an emotional connection, telling a story and impacting on and engaging the viewer. We were incredibly pleased that the Qantas ‘Feels Like Home’ campaign won the ‘Grand Prix’ in our creative competition – voted by creative directors and industry professionals. The judges agreed that ‘Feels Like Home’ underscored that simple, emotive creative that works at a glance, is the ultimate power of OOH.

While the power of the poster is undeniable, we are seeing greater use of clever technology in what once was considered to be a very traditional channel. I believe this is why we are perfectly positioned to sustain our growth. We are old, but we are new – our value lies in both. While digital can transform us, it is OOH’s ability to make the big bold statement in the public domain that makes us stand out to Australians, who are increasingly spending more time in the great outdoors.
“Our annual MOVE update in 2015 saw audiences increase by 3.4% – well ahead of 2.4% population growth – and this has been the trend for the past five years. It is the nature of our channel to develop with our audiences in urban areas, and this is reflected in an 18% audience increase in the five years since MOVE launched.”

STEVE O’CONNOR, CHAIRMAN, OMA & MOVE

*Revenue refers to net figures.
†2014 figures have been adjusted from previously reported revenue to reflect changes in OMA membership, allowing direct comparisons in revenue year-on-year.
I like the view from here. It is expansive and bright. The Out-of-Home (OOH) industry is experiencing a renaissance. It is currently the second-fastest growing media sector, with the pace of growth picking up significantly in 2015.

—

OOH is becoming more attractive to advertisers in this changing media landscape. OOH’s core strengths of impact and reach sit in stark contrast to the fragmentation taking place in other traditional media channels. And while these other channels experience structural pressures brought about by digital disruption, digital in fact enhances the OOH experience. And we know that when it comes to practical applications for new technology, we are only seeing the tip of the iceberg.

Innovative use of technology will see OOH connect more with other digital and mobile devices, allowing advertisers to connect with their audiences anywhere, anytime – whether via a traditional Outdoor poster, a digital screen or the merging of the two, through the Internet of Things. That, coupled with the new marketing currency of ‘location’, one of OOH’s key drivers, gives advertisers the ability to geo-target their messages.

In 2016, we will be leveraging digital innovation for advertisers and agencies, making it easier for them to discover, plan and buy our medium. We hope to build on the strengths of MOVE – our robust audience measurement tool – by fusing it with emma (Enhanced Media Metrics Australia) to provide clients with richer insights and data about the Outdoor audiences they are buying.

We will also embark on building an Automated Transaction Platform to make the planning and transacting of OOH easier for media buyers and our members.

According to MOVE, our audiences have grown a massive 18% in the past five years, which has brought populations and cities into sharp focus for us. UNICEF predicts that by 2050, 96% of our population will be urbanised and for Australia’s capital cities that means, in the next 35 years, a doubling of the current population. As a result, there will be more reliance on signs to offer utility.

We are seeing a recognition and willingness at all levels of government to engage and partner with industry to tackle the big issues of housing, congestion, sustainability, development, pollution, public transport, infrastructure, safety and security.

OOH is uniquely positioned to offer cities smart solutions by offering utility through Wi-Fi and information hubs, providing transport and way-finding solutions so people can traverse cities with seamless ease.

In 2016, the OMA will be holding its first Future Cities talks, with the aim of bringing together city thinkers and cultural creators to encourage open, collaborative and aspirational communications between city councils and the OOH industry. Inspirational speakers from around the world will share their vision on how cities of the future will be more connected and easier to navigate for its citizens and visitors alike.

As the CEO of the industry body, I am proud of the camaraderie that exists among our members, especially in this time of innovation and rapid conversion to digital technology. I believe our next big technology project, the development of our Automated Transaction Platform, will see the industry build on its strengths.

Peter Horgan, CEO of media agency OMD and Chair of the Media Federation of Australia said, “We’re pleased to see the OMA embrace automation as a priority and we believe there is a need to make buying and selling media more efficient for our clients. Developing the world’s first Outdoor Automated Transaction Platform is an exciting and significant leap forward for the OOH industry.”

We have worked hard in 2015 to capitalise on our industry’s renaissance. The growth we have experienced wouldn’t have been possible without the vision of the OMA Board, ably led by our Chairman, Steve O’Connor. The dedication and commitment goes beyond the board, across the industry to many individuals who work tirelessly on all the OMA committees to support our ideas and programs. All of this is orchestrated by the OMA and MOVE teams, who show up each day brimming with ideas and work hard to make them happen. Without doubt the board, the members and the staff are the backbone of our success. For their work and good spirits, I thank them all.

It has been a year of phenomenal change in Outdoor. I can’t wait to see what happens next.
“According to MOVE, our audiences have grown a massive 18% in the past five years, which has brought populations and cities into sharp focus for us. UNICEF predicts that by 2050, 94% of our population will be urbanised and for Australia’s capital cities that means, in the next 35 years, a doubling of the current population. As a result, there will be more reliance on signs to offer utility.”

CHARMAINE MOLDRICH, CEO, OMA & MOVE
OMA/MOVE BOARD OF DIRECTORS

STEVE O’CONNOR, CHAIRMAN
JCDecaux
Steve has more than 25 years’ Out-of-Home (OOH) industry experience, initially as a Sales Manager before becoming CEO of Buspak Hong Kong six years later. He was appointed CEO for Buspak Australia and New Zealand in 1998; during six years in this role, Steve grew the organisation and established himself as a dynamic leader in the OOH industry. He joined JCDecaux as CEO in 2004 and is responsible for over 150 staff and a varied portfolio of street furniture, transit and billboards. Steve became Chairman of the OMA and MOVE in May 2014.

ROB ATKINSON
ADShEL
Rob joined Adshel as CEO in 2011, having previously held the position of COO at Clear Channel UK. Rob originally joined Clear Channel in 2005 as Sales Director, quickly being promoted to Group Sales Director, Managing Director and lastly COO in early 2011. He won the prestigious Campaign Magazine UK Sales Leader of the Year in 2009. Before joining Clear Channel, Rob held various senior roles at Associated Newspapers in the UK.

BRAD BISHOPP
BISHOPP OUTDOOR ADVERTISING
As the Managing Director, CEO and Co-Founder of Bishopp Outdoor Advertising, Brad is a strong advocate and representative for industry professionalism and contributions to the community. This has been demonstrated through the company being a Queensland member of the OMA for the past 18 years. Brad has been on the OMA Board since 2006.

MATTHEW BYRNE
ROVA MEDIA

BRENDON COOK
OOH MEDIA
Brendon has been at the forefront of the Out-of-Home (OOH) industry for more than 36 years. In 1989 he established oOh!media, and has helped pioneer the industry’s move into digital. oOh!media has seen nine consecutive years of revenue growth through strategic acquisitions, organic growth and the development of new environments, capitalising on digital OOH growth and people’s increasing media consumption habits away from home. Brendon was instrumental in the development of MOVE, is a founding OMA Board member, and board member of PEPE, the international OOH association.

RICHARD HERRING
APN OUTDOOR
Bringing over 30 years of media experience, Richard assumed the role of CEO of APN Outdoor in 2004, and recently led the company through significant changes, including an IPO in 2014. Prior to this he was General Manager of Sales and Marketing at Cody Outdoor, before becoming CEO. Cody Outdoor was acquired by APN News & Media and became part of APN Outdoor in 2004. Richard was Chairman of the OMA from 2011 to 2014.
CHARLES PARRY-OKEDEN
EXECUTIVE CHANNEL NETWORK
Charles has 25 years’ experience in media sales. He began his career in radio before moving to the world of Out-of-Home (OOH). Charles spent 12 years at Buspak, reaching its most senior sales position, when Buspak recorded unprecedented revenue and profit. In 2005, he co-founded Executive Channel International and, in 2008, established the highly-successful B2B business model, Media i. As one of Australia’s digital OOH pioneers, Charles is well-credentialed to deliver a clear vision for the industry’s continued success.

PETER SAVAGE
METROSPACE OUTDOOR ADVERTISING
Peter has more than 27 years’ experience in the Out-of-Home industry. Further to a family history within the industry, Peter had his first senior management role in acquisitions for Arthur Maiden Pty Ltd in London in the late 1980s. He returned to Australia, developing sites for Savage Outdoor Advertising and subsequently moving to Metrospace as Executive Director, a role he has held for the past 21 years. Peter’s expertise lies in site acquisition, development and planning.

CHRIS TYQUIN
GOA
A 30 year-plus veteran of the advertising industry, Chris is one of the most experienced professionals in the business. A former Chairman of the OMA, he has been responsible for some of the Out-of-Home industry’s most innovative research studies and played a key role in the commissioning of the acclaimed audience measurement system, MOVE. Under his leadership, goa billboards launched Australia’s first digital billboard network. As well as being Joint Managing Director of goa, Chris is on the boards of both the Brisbane Festival and the Museum of Brisbane.

LEAH WHITFORD
IOM
Leah is Joint Managing Director of IOM, Victoria’s leading independent billboard company. She has held senior industry roles servicing Australia, New Zealand, UK and the Asia Pacific and Middle East regions. Her experience has involved launching new products and growing new markets, including securing the Outdoor media contract at Colombo Airport in Sri Lanka. Leah’s extensive industry knowledge spans management, sales and marketing, all aspects of signage hardware and construction, digital production and new technology. Her aim is to ensure that the Out-of-Home industry keeps pace with the convergent technology that delivers consumers to advertisers.

CHARMAINE MOLDRICH
OMA/MOVE
Refer to page 14 for Charmaine Moldrich’s biography.
OMA BOARD OF DIRECTORS

The OMA is governed by a Board of Directors elected by the members, according to the Constitution. There were four official meetings of the OMA Board of Directors in 2015 and additional strategy sessions scheduled as needed.

ANNUAL GENERAL MEETING

The Annual General Meeting of the OMA was held in Sydney on 27 May 2015. There were more than 80 members from across the industry in attendance.

<table>
<thead>
<tr>
<th>DIRECTOR</th>
<th>COMPANY</th>
<th>DIRECTOR SINCE</th>
<th>MEETINGS ATTENDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROB ATKINSON</td>
<td>Adshel</td>
<td>2012</td>
<td>4</td>
</tr>
<tr>
<td>BRAD BISHOPP</td>
<td>Bishopp Outdoor Advertising</td>
<td>2006</td>
<td>2</td>
</tr>
<tr>
<td>MATTHEW BYRNE</td>
<td>ROVA Media</td>
<td>2011</td>
<td>4</td>
</tr>
<tr>
<td>BRENDON COOK</td>
<td>oOh!media</td>
<td>2003</td>
<td>3*</td>
</tr>
<tr>
<td>RICHARD HERRING</td>
<td>APN Outdoor</td>
<td>2004</td>
<td>3*</td>
</tr>
<tr>
<td>CHARMAINE MOLDRICH</td>
<td>OMA</td>
<td>2010</td>
<td>4</td>
</tr>
<tr>
<td>STEVE O’CONNOR (Chair)</td>
<td>JCDecaux</td>
<td>2004</td>
<td>4</td>
</tr>
<tr>
<td>CHARLES PARRY-OKEDEN</td>
<td>Executive Channel Network</td>
<td>2013</td>
<td>3</td>
</tr>
<tr>
<td>PETER SAVAGE</td>
<td>Metrospace Outdoor Advertising</td>
<td>2013</td>
<td>4</td>
</tr>
<tr>
<td>CHRIS TYQUIN</td>
<td>goa</td>
<td>2014</td>
<td>2</td>
</tr>
<tr>
<td>LEAH WHITFORD</td>
<td>iOM</td>
<td>2011</td>
<td>3†</td>
</tr>
</tbody>
</table>

*The August board meeting was attended by an alternate nominated by Brendon Cook – Noel Cook, and an alternate nominated by Richard Herring – Andrew Hines as per the OMA Constitution.

†The November board meeting was attended by an alternate nominated by Leah Whitford – Adam Whitford as per the OMA Constitution.
MOVE BOARD OF DIRECTORS

MOVE is governed by a Board of Directors voted in by the MOVE shareholders, and includes the MOVE CEO who represents the interests of the minority shareholders. There were four official meetings of the MOVE Board of Directors in 2015.

<table>
<thead>
<tr>
<th>DIRECTOR</th>
<th>COMPANY</th>
<th>DIRECTOR SINCE</th>
<th>MEETINGS ATTENDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROB ATKINSON</td>
<td>Adshel</td>
<td>2012</td>
<td>4</td>
</tr>
<tr>
<td>BRENDON COOK</td>
<td>oOh!media</td>
<td>2003</td>
<td>3*</td>
</tr>
<tr>
<td>RICHARD HERRING</td>
<td>APN Outdoor</td>
<td>2004</td>
<td>3*</td>
</tr>
<tr>
<td>CHARMAINE MOLDRICH</td>
<td>OMA / MOVE</td>
<td>2010</td>
<td>4</td>
</tr>
<tr>
<td>STEVE O’CONNOR (Chair)</td>
<td>JCDecaux</td>
<td>2004</td>
<td>4</td>
</tr>
<tr>
<td>CHRIS TYQUIN</td>
<td>goa</td>
<td>2014</td>
<td>2</td>
</tr>
<tr>
<td>LEAH WHITFORD</td>
<td>iOM</td>
<td>2011</td>
<td>3*</td>
</tr>
</tbody>
</table>

*The August board meeting was attended by an alternate nominated by Brendon Cook – Noel Cook, and an alternate nominated by Richard Herring – Andrew Hines as per the MOVE Shareholder Agreement.
†The November board meeting was attended by an alternate nominated by Leah Whitford – Adam Whitford as per the MOVE Shareholder Agreement.
In 2015, the OMA and MOVE were managed by the CEO and employed eight full-time staff and one part-time staff member. The OMA and MOVE rely on consultants, freelancers and agencies for assistance on a project basis.

CHARMAINE MOLDRICH
CEO
Charmaine Moldrich is CEO of both the OMA and MOVE. She has more than 30 years’ experience in leadership, management, marketing, communications and business development across a variety of sectors including the arts, media, higher education and government. Prior to joining the OMA and MOVE five years ago, Charmaine spent 12 years working in the NSW public service sector at a senior executive level. Charmaine sees her role as one which leads industry growth in a rapidly-changing, technology-driven world. She strives to see the Out-of-Home channel embraced as an integral part of every media plan. Throughout her working life, Charmaine has sat on a variety of not-for-profit boards.

DOUGLAS CHAU
SYSTEM MANAGER, MOVE
Douglas is responsible for the management of all MOVE software, including the day-to-day management of users, monitoring core functionalities as well as software feature innovation and development. Before joining the MOVE team in mid-2015, Douglas completed his Bachelor of Science in Information Technology and spent two years working in the IT industry.

TI-AHNA FIRTH
COMMUNICATIONS MANAGER
Ti-Ahna joined the OMA in 2013 as Marketing Coordinator after 10 years working in various wholesale and retail positions. In her first year she was promoted to Digital and Marketing Executive to reflect her role managing the OMA’s digital communications. In 2014, Ti-Ahna was promoted to Communications Manager, leading the management of OMA and MOVE events, newsletter content, PR activities and the production of the OMA’s publication on Outdoor creative, OPEN².

KYLIE GREEN
INNOVATION & TRAINING MANAGER, MOVE
Kylie has eight years’ administrative experience working in the areas of law and finance/banking for high-profile companies. She is responsible for managing MOVE’s day-to-day operations, the processing and analysis of data updates and the delivery of its training program. Kylie supports MOVE in associated developments, with a focus on project management around developing the OMA’s Automated Transaction Platform.

GRANT GUESDON
GENERAL MANAGER, MOVE
Grant looks after the daily management of MOVE and its development. His role involves overseeing the MOVE team in training, methodology changes, research and statistical analysis. In 2015, Grant was promoted to General Manager. Prior to joining MOVE, Grant worked for the development company responsible for building the MOVE system. He has over 13 years’ experience in the planning and buying of media campaigns.

Left to right: Charmaine Moldrich, Douglas Chau, Ti-Ahna Firth, Kylie Green, Grant Guesdon.
KATHY HAMILL  
GENERAL MANAGER

Kathy joined the OMA in April 2015 and is responsible for the strategic direction and marketing of the OMA and MOVE. Kathy has held senior executive roles in media and marketing internationally during a 25-year career, including in Australia at SBS, Independent Digital Media, Brand New Media and Reed Publishing. Throughout her career she has been a board member and held directorships in various media companies. Through her marketing consultancy, she has helped brands and media organisations with their brand story and digital strategy.

AILING HUANG  
MARKETING & OFFICE ASSISTANT

After completing her degree in Communications from the University of Technology Sydney, Ailing spent time in various internships in the fashion industry before settling at the OMA. Ailing supports the marketing team with social media and website content management.

MADDISON NAPPER  
EXECUTIVE ASSISTANT TO THE CEO

After holding organisational roles in both fashion and tertiary education, Maddison joined the OMA in 2015 and provides high-level administrative support. Maddison is in the final stages of a Bachelor of Psychological Science at the University of New England, Armidale.

TESS PHILLIPS  
SENIOR POLICY ADVISOR

Tess joined the OMA in January 2015 and oversees government relations and regulatory affairs. Her role includes working with regulators, writing submissions to support the industry, developing policy and education for members and advising the CEO and members on issues of management and advocacy. She previously managed policy directives and operational teams within the Federal Government’s Department of Social Services and Department of Immigration and Border Protection.

CATHY TOWERS  
PLANNING & POLICY OFFICER

Cathy is qualified in Business Administration and, has a Masters Degree in Town Planning from the University of London. Prior to joining the OMA, Cathy worked as Policy and Project Officer for the Planning Institute of Australia in Sydney. Cathy works closely with the OMA’s Senior Policy Advisor to facilitate and advocate for reasonable regulations in the Out-of-Home industry.

JULIE JENSEN  
DIRECTOR OF MARKETING  
(March 2013 – April 2015)

EMMA LUTTRELL  
SENIOR POLICY ADVISOR  
(July 2012 – January 2015)
“In the world of digital and social channels and much more targeted communications, Outdoor delivers a chance to get brand visibility that virtually no other channel can do for us.”

CAROLYN BENDALL, HEAD OF MARKETING, ANZ AUSTRALIA
THE WORLD
SAID I SHOULD
WAIT
2015 HIGHLIGHTS

The OMA unites the industry and promotes and represents Out-of-Home (OOH) to the broader advertising community. From media activity to networking events, joint-industry sponsorship and government lobbying; the OMA is the nexus for OOH industry activity.

REVENUE
Once again, industry revenue reached a record high, posting a 17%* increase year-on-year, taking the industry’s net revenue to $677.8 million, up from $579.3 million* in 2014. In tracking the growth across 2015, there was a strong start with a 21.6%* year-on-year increase for quarter one, followed by a 16.3%* increase in quarter two. The industry continued its double-digit growth in quarter three with a 14.2%* increase from the same period in 2014, finishing with an extraordinary 16.6%* year-on-year increase in quarter four.

CEASA ON OUTDOOR
Once again, OOH was the only traditional media channel to grow in 2015, according to Commercial Economic Advisory Service of Australia (CEASA) – the advertising industry benchmark. In 2015, CEASA reported OOH’s share of advertising spend was 5.3% out of the $12.8 billion total spent on advertising.

SOCIAL MEDIA
OMA social media engagement grew significantly in 2015 with the launch of the OMA Instagram account and a new OMA LinkedIn page. The OMA continued to lead the conversation about the strengths of OOH through social channels, reaching members, advertisers and government. Through the CEO’s blog, Charmaine Moldrich explored in depth the growth and dynamism of urban Australia, why Outdoor audiences outpace population growth and how Outdoor plays a role in providing utility for future cities. The blog is another way the OMA helps members stay connected with the work that the association does.

NEW MEMBERS
During the year, the OMA welcomed two new members – taking the total membership to 32. The new members come from different sides of the digital spectrum: ADLED specialises in providing market-superior LED screens to the OOH industry, as well as delivering fabricated structures with quality aesthetics. Tonic Health Media is an up-and-coming digital media display company. It has a network of screens broadcasting programming designed to improve health literacy to places where people wait for health services – such as hospitals, doctors’ offices and outpatient care facilities.

INTERNATIONAL
In April, board member of the OMA and MOVE and oOh!media’s CEO, Brendon Cook, was appointed to the board of the international OOH industry body – the Federation European Publicite Exterieur (FEPE) – as International Vice President. It is the first time in FEPE’s 50-year history that a representative from Australia and New Zealand has held this position. In June, Brendon presented a session on the state of the Australian OOH industry at the 56th annual FEPE Congress in Budapest. Other OMA representatives attending the congress included board members Richard Herring (CEO, APN Outdoor) and Chris Tyquin (joint Managing Director, goa), as well as Kathy Hamill (General Manager, OMA).

OUT & ABOUT Q&A
During the year, more than 200 members from Brisbane, Melbourne and Sydney attended a series of Q&A sessions with some of the industry’s most innovative advertisers and agencies. The discussion centred around how they see the media world changing and what part OOH plays in making the transition from old to new media.

A DAY IN THE LIFE
The industry’s mid-year campaign showcased the results of ‘A Day in the Life’, a study conducted to measure time spent with media per person. It found that Outdoor is in the top three media channels consumed by people – the other two being online and TV – and that it makes up 20% of people’s total daily media consumption.

TIME TO GET OUTDOOR IN SUMMER
The OMA launched a trade advertising campaign in the lead up to summer demonstrating to advertisers that as the weather warms up, 83% of people say they spend even more time outdoors, proving Outdoor delivers even bigger audiences in the warmer months. Through video interviews, five of Australia’s leading marketers revealed how they leverage Outdoor to reach and engage with their audiences in unique ways.

*2014 figures have been adjusted from previously reported revenue to reflect changes in OMA membership, allowing direct comparisons in revenue year-on-year.
OUTDOOR GIVES BACK
The OMA continued its Outdoor Gives Back campaign with the aim of promoting the lesser-known facts about what the industry does by highlighting its charitable contributions (‘This ad gives blood’) and public infrastructure (‘This ad built this bus shelter’). In 2015, OMA members donated $34 million of advertising to non-profit organisations ranging from the arts to charities and community groups, on top of the industry’s investment in building infrastructure.

CREATIVE COLLECTION
Now firmly established on the OMA calendar and in its third year, the Creative Collection competition acknowledges and celebrates the best creative and innovative executions the OOH industry has to offer. Each quarter, submissions are judged by a panel of industry and creative agency representatives. In 2015, the first-ever Grand Prix was awarded to Qantas for the ‘Feels Like Home’ campaign (pictured above).

A PIVOTAL YEAR
The industry’s sixth year of consecutive revenue growth in 2015 was pivotal in laying the foundations for 2016 and beyond. In mid-2015, the OMA announced plans to launch an Automated Transaction Platform and, in November, announced that data from MOVE would be integrated into emma (Enhanced Media Metrics Australia). The OMA also renewed its focus on its relationships with all levels of government to build a more sustainable future for its members.

AUTOMATED TRANSACTION PLATFORM RECEIVES A GLOBAL RESPONSE
Twenty companies/consortiums, based in Australia (Adelaide, Brisbane, Melbourne and Sydney) and overseas (India, Portugal, Spain, UAE, UK and USA), responded to the OMA’s Expression of Interest to build an Automated Transaction Platform (ATP). The ATP will create a one-stop hub for the planning, buying and selling of OOH across all formats in Australia. “We believe garnering this much national and international talent bodes well for the development of this platform, which will be a world-first for the OOH industry,” said Grant Guesdon, General Manager of MOVE. It is expected the winning company or consortium will be announced in June 2016.
**TALKING CITIES**

Increasingly, Out-of-Home (OOH) provides infrastructure with in-built technology delivering innovative benefits to help make cities more accessible.

The OMA ran an industry urban design workshop, ‘Is Good Urban Design in the Eye of the Beholder?’. The workshop invited local governments across NSW to describe their vision for their cities, helping the Outdoor industry see where OOH would fit.

Held at the Australian National Maritime Museum, Sydney, the event was opened and moderated by Dr Tim Williams, CEO of the Committee for Sydney and included speakers from industry and government:

- Tim Horton, Registrar, NSW Architects Registration Board (Keynote)
- Charmaine Moldrich, CEO, OMA
- Sue Weatherley, Director Strategic Outcomes & Development, Parramatta City Council
- Toni Averay, Director Planning & Growth, Liverpool City Council
- Catherine McMahon, Manager Strategic Planning, City of Botany Bay Council
- Jesse McNicoll, Urban Design Coordinator, City of Sydney

“There’s been significant investment in infrastructure, road and transit in particular: that’s going to drive even more opportunity in 2016. Then there is urbanisation – the migration of the population to urban centres.”

**ROB ATKINSON, CEO, ADSHEL**
INVESTING IN THE COMMUNITY

The Out-of-Home (OOH) industry is very conscious of its responsibility, ensuring that it gives back to the community as it is the most public advertising medium. It is located where people live, shop, socialise, travel and work, and informs a city’s character.

Across Australia, the OOH industry contributes more than 17,000 items of community infrastructure, including bus shelters, kiosks, park benches, pedestrian walkways and telephone booths which is valued at approximately $275 million.

OOH contributes $250 million GDP each year to the economy and employs more than 750 people directly. Government and superannuation funds profit from OOH through rents paid on leasing signs, stock from roads, railways and buildings.

The OOH industry plays an important role in promoting the arts, sports and charitable organisations. In 2015, it is estimated that the industry donated advertising space valued at more than $34 million to charitable and community campaigns.

JOINT INDUSTRY SPONSORSHIP

The OOH industry extended its sponsorship of National Missing Persons Week by partnering with the Australian Federal Police (AFP), growing the campaign from the Eastern Seaboard to an Australian-wide initiative – and it has evolved since.

Each year, more than 35,000 people are reported missing. While 95% are found within a short period of time, there remain approximately 1,600 long-term missing persons. This is an issue that has the potential to affect anyone, irrespective of age, gender, sexuality, culture, profession or educational background.

The campaign was aimed to both assist in finding these people and raise awareness for all missing person’s cases.

OMA CEO Charmaine Moldrich, said that the national expansion of the campaign in partnership with the AFP was a natural progression.

“Our audiences keep growing and our digital reach is increasing – using this unique position to broadcast critical information that could bring solace to people in need is very important to us,” she said.

Nationally, members donated almost $1 million in advertising space and production costs, an increase of 200% on the previous year. Advertising space included billboards, digital screens (cafes and pharmacies), street furniture and taxi backs.

The OMA thanks the following members for their generous participation: Adshel, APN Outdoor, Bishopp Outdoor Advertising, Executive Channel Network, goa, JCDecaux, Metrospace, oOh!media, QMS Media, ROVA Media, Tayco Outdoor Advertising and TorchMedia. It also acknowledges Cactus Imaging, MMT Print and Omnigraphics for providing printing services.
COMMUNITY SPONSORSHIP

In addition to the joint industry sponsorship of National Missing Persons Week, OMA members support more than 160 other beneficiaries, with significant contributions to a wide range of Australian charities, healthcare organisations, environmental organisations, public bodies and arts and cultural organisations.

The ubiquity of Out-of-Home (OOH) means it is particularly effective for campaigns that aim to raise awareness, especially around public health and safety messaging. A list of beneficiaries of donated or discounted advertising space can be found on pages 58 and 59, while below is a list of OMA member sponsorship highlights:

ADLED built and operated a digital billboard for Guide Dogs Queensland, which was used to generate revenue for the organisation and, in turn, help provide the vital services the organisation offers to the community.

Adshel supported a range of charitable organisations through both donated media space and cash contributions. One of the highlights for the year was assisting the Lung Foundation Australia in communicating the dangers of smoking by using a set of mechanical lungs as a way of innovatively activating the charity’s message. Adshel also supported the Wesley Mission Australia and the Sydney Children’s Hospital Foundation’s Gold Telethon to encourage donations for the cause. Adshel’s support also extended to the Cure Cancer Australia Foundation and Asthma Australia.

APN Outdoor partnered with Camp Gallipoli – a not-for-profit organisation – to commemorate 100 years of the ANZAC spirit by promoting the organisation’s sleepout events across Australia and New Zealand in April. The company continued to support its long-standing partnerships with a range of arts organisations including the Sydney Opera House, Sydney Festival and the OpenAir Cinema, as well as the Fringe Festival in Perth and National Gallery of Victoria. It also supported a wide range of community organisations and charities, including The Big Issue and the RSPCA.

Bishopp Outdoor Advertising supported a number of charities and causes in Queensland, ranging from the Lockyer Valley Garden Festival to litter prevention in the town of Withcott. It also supported a roadside anti-litter campaign for the Department of Environment and Heritage Protection (Queensland) and campaigns for road safety through Queensland Police and Queensland’s Department of Transport and Main Roads.
Cactus Imaging donated printing services to charities, including the Royal Flying Doctor Service of Australia, National Breast Cancer Foundation, Humpty Dumpty Foundation, Camp Quality and 4 ASD Kids.

Executive Channel Network (ECN) staff and clients completed Oxfam 100km trail walks in Sydney and New Zealand, raising over $20,000. Staff and clients also collaborated again in Sydney’s CBD, abseiling off a 33-storey skyscraper in Martin Place as a sponsor for Investa’s charity event, Abseil for Youth. ECN was also the gold sponsor of the Great Cycle Challenge, which raised over $2.6 million to fight children’s cancer.

goa has been a major sponsor of the Brisbane Festival since 1999 and in 2015 it helped paint the town pink, broadcasting images from the event across static and digital inventory. goa is also a sponsor of the Museum of Brisbane and helped the Queensland Music Festival broadcast performances from the Keys to the City event across Brisbane. The company is also a principal sponsor of the Vinnies CEO Sleepout, which Joint Managing Director John Tyquin took part in. goa is also a media partner for the Cancer Council – Relay for Life, providing both static and digital billboards across Brisbane and throughout Queensland’s regional centres.

iOM supported a range of organisations, from Hockey Victoria and Odyssey House to Amaze and the Humpty Dumpty Foundation.

JCDecaux continued its long-standing and valuable sponsorship of the Sydney Opera House and continued key partnerships with cultural institutions at a national and state level, including the Museum of Contemporary Art, Art Gallery of New South Wales, Queensland Ballet and Melbourne International Film Festival. It sponsored a large number of local and international charities in 2015, in particular the Starlight Foundation, Surf Life Saving Australia, Movember and Kids Under Cover. Health and safety campaigns supported by JCDecaux included a public bike scheme in Brisbane and The Line campaign encouraging young men to consider their behaviour and attitudes toward women.

Metrospace gave ongoing support to the Queensland Fire and Emergency Services in 2015. It was also involved in Brisbane Open House, supporting Brisbane’s historical buildings and architecture.

“The partnership provides a level of exposure we wouldn’t be able to pursue without the support of the OMA, not only in support of our campaign, but most importantly, in support of the State and Territory police who work tirelessly to solve missing persons cases every day.”

SHANE CONNELLY, NATIONAL MANAGER, CRIME OPERATIONS, AUSTRALIAN FEDERAL POLICE
“I am most proud of the industry’s ability to share the same vision and stand together for relevant community messaging. As an industry, being a mass medium we have a social obligation to broadcast relevant communication to the wider public.”

BARCLAY NETTLEFOLD, CEO, QMS MEDIA
MMT Print remains the Queensland Ballet’s longest-standing sponsor. It also maintained its support of the Robert Connor Dawes Foundation. Throughout the year, MMT displayed a billboard for the Queensland Government’s Workplace Health and Safety campaign at its facility in Brisbane.

Omnigraphics supported Australian and Victorian Government health and safety campaigns, including Victoria’s Transport Accident Commission.

oOh!media donated over $9 million of media space to numerous charity and community causes in 2015 and ran community health and safety campaigns across State Government departments in New South Wales, Queensland, South Australia, Victoria and Western Australia.

Outdoor Systems supported the GI Cancer Institute to promote the work the Institute does in the area of gastro-intestinal cancer research.

Paradise Outdoor Advertising continued its support for the Townsville Mayor’s Christmas Tree Appeal, as well as Ronald McDonald House fundraisers and the charity Aussie Helpers, whose goal is to ‘help fight poverty in the bush’.

Prime Signs was a silver sponsor of the Queensland Government’s ‘Workplace Health and Safety Week’ in October and also supported a range of community sponsorships and charitable campaigns including the Cure Brain Cancer Foundation, Cancer Council – Relay for Life and Boystown.

QMS Media supported a number of charities and not-for-profit organisations in 2015, donating over $1 million in media space to help raise awareness for Bowel Cancer Australia, Cancer Council – Relay for Life, RSPCA – Cupcake Day, Cerebral Palsy Alliance – Step-tember, McGrath Foundation, Project Everyone, Beyond Blue, MND (Motor Neurone Disease) – Freeze at the G, Very Special Kids, McHappy Day, Pink Hope Gala and Ronald McDonald House – Ride for Sick Kids.

ROVA Media provided support to the Sydney Theatre Company, Belvoir St Theatre and Sydney Festival. ROVA also supported Ronald McDonald House in Adelaide, Canberra, Gold Coast, Melbourne and Sydney. It also supported the Waratahs Rugby Team and the Danny Green ‘Stop the Coward Punch’ campaign.

Tayco Outdoor Advertising gave its support to a number of regional events, including multicultural festivals in Childers and Bundaberg, the Calliope Rodeo and both the Noosa Food and Wine Festival and Bundaberg Flavours Festival.

Tonic Health Media donated media space and created content with a number of its partners, including Health Direct, Beyond Blue, Leukaemia Foundation and the Australian Commission on Safety and Quality in Healthcare. It also worked with 1800Respect and with the National Breast Cancer Foundation on two campaigns to engage general practitioners.

TorchMedia’s CEO, Andrew Gibson, took part in the Vinnies CEO Sleepout for the fifth time – his second as an ambassador for the event. TorchMedia also worked with the Victoria Police Blue Ribbon Foundation, raising awareness of police officers killed in the line of duty.
REGULATION

The OMA supports the reasonable regulation of Out-of-Home (OOH) advertising and is committed to supporting Australia’s successful system of self-regulation of content. When it comes to safety of roadside signage and overarching planning systems, the OMA works closely with State and Local Government regulators to ensure that planning controls promote safe, high-quality signage and advertising, particularly in the context of new and emerging technologies.

OOH CONTENT SELF-REGULATION
The OMA works with the Advertising Standards Bureau (ASB) to ensure OOH advertising meets prevailing community standards and attitudes. The OMA supports the complaints procedure managed by the ASB. The OMA also works with the Australian Association of National Advertisers, The Communications Council and the ABAC Responsible Alcohol Marketing Scheme to ensure that members only display advertising that meets community standards and the self-regulatory codes. The OOH industry undertakes training and consultation to continuously strengthen the self-regulatory system and reduce the number of complaints upheld by the ASB.

In recent years, the OMA and its members have responded to inquiries into content by the Federal and Queensland Governments, and a report on content by the Western Australian Government. Through these inquiries, the OMA and its members have demonstrated that the industry’s system of self-regulation continues to deliver high standards of compliance with industry codes of practice. This has led to the recognition that the current self-regulatory system is working effectively.

CONTENT REVIEW AND ADVICE
Introduced in 2011, the OMA’s Content Review Policy encourages members to submit contentious copy to the OMA prior to posting. The OMA’s Concept Advisory Service provides advice for members, advertisers and creative agencies on the suitability of advertising content, ensuring it meets industry codes of practice. In 2015, members and creative agencies sent 189 advertisements for review prior to posting.

In 2015, Outdoor advertising made up 6% of total advertising complaints to the ASB. The percentage of complaints relating to Outdoor has almost halved since 2014. The OMA’s content review and advisory services have assisted in decreasing the number of upheld complaints from eight in 2010 to three in 2012, one in 2013 and 2014, and two in 2015. A very good result considering that the industry posts over 30,000 campaigns around the nation every year. Another positive trend is that the OMA has seen a steady reduction in the number of upheld complaints relating to sex, sexuality and nudity since the introduction of the industry’s content training.

STATE REGULATION
The OMA works closely and consistently with road authorities in New South Wales, Victoria, Queensland and other states to advocate on behalf of the OOH industry and seek reasonable evidence-based regulations. The OMA also works with each state’s Department of Planning to ensure planning regulations provide adequately for Outdoor advertising.

In 2015, the OMA worked closely with the NSW Department of Planning and in December, the Department exhibited a set of guidelines for digital signage. In Victoria, the OMA submitted to Plan Melbourne Refresh, and in Queensland the OMA engaged with the Department of Planning regarding the introduction of its overarching Planning Bill. Throughout 2015, the OMA presented its driver behaviour study to road authorities in New South Wales, Queensland, South Australia, Victoria and Western Australia. The study aimed to explore the relationship between drivers’ viewing behaviour towards Outdoor advertising signs and their subsequent driving performance in a live, real-world environment. It compared driver behaviour and performance in the presence of third party signage, on-premise signage and in the presence of digital, compared to static signage. The study showed:

— Drivers maintain their eyes on the road 78–79% of the time, regardless of what signage is present
— Ninety-nine percent of fixations at advertising signs lasted less than 750 milliseconds, the minimum time needed by a driver to perceive and react to an unexpected event
— Driver behaviour did not differ dangerously, no matter what signage was present. Drivers maintained a safe average headway and there were no lane departures in the study.
“The working relationship between the OMA and ASB continues to strengthen and mature. Consultation between the organisations continues to strengthen the self-regulation system in Australia.”

FIONA JOLLY, CEO, ADVERTISING STANDARDS BUREAU
“Our strength is our ability to deliver huge numbers. We can personalise at scale now, thanks to digital technology. We’ve got access to so much more smart data, that allows us to overlay and be more precise with our targeting.”

ROB ATKINSON, CEO, ADSHEL
INSPIRING CREATIVE EXCELLENCE

The evolution of Outdoor advertising creative, is setting the benchmark for the industry.

Outdoor is no longer just about billboards and posters. The integration of technology and use of mobile has evolved Out-of-Home (OOH) into a medium that is becoming ever more flexible and innovative.

—

The OMA Creative Collection competition was born out of a desire to review, reflect and celebrate great Outdoor creative and innovation. The competition is curated by the OMA and judged on a quarterly basis by a panel comprised of OMA members and advertising agency creative directors. The winners are featured in the OMA’s publication, OPEN, which was first published to drive conversations around what makes great Outdoor, from both an aesthetic and advertising perspective.

Launched in 2013, the competition is now in its fourth year and continues to gain momentum. In 2015, the competition piqued with the announcement of the first annual Creative Collection Grand Prix winner.

Selected from more than 200 campaigns submitted throughout 2015, the Qantas ‘Welcome Home’ campaign was named the 2015 Grand Prix winner, and was judged based on the following criteria:

— A simple idea that is flawlessly executed within a single glance
— Visual impact and strong creative appeal
— Encourages people to think and/or generates an emotional response
— Clear and obvious branding
— Complements/strengthens other mediums (online/digital, mobile, radio, TV and print)
— Contextually relevant
— The idea lends itself to further engagement and interaction through the use of digital OOH technology or innovation.

OMA CEO, Charmaine Moldrich, commented: “It’s heartening to see a poster, which I believe has the power to paint a thousand words, winning the OMA 2015 Grand Prix, amid the talk of digital.”

“It was also great to see more use of clever, relevant technology in what has, until recently, been considered a traditional medium. The future for Outdoor advertising is very exciting indeed”, added judge Adam Rose, Executive Creative Director/Founding Partner, AJF Partnership.

The OMA would like to thank all of the guest judges who throughout 2015 have inspired healthy and robust debate about OOH advertising.

2015 judges:

— Leah Whitford, Joint Managing Director, iOM
— Blair Robertson, General Manager, Daktronics
— Adam Rose, Executive Creative Director/Founding Partner, AJF Partnership
— Peter Woodward, Client Services Director, Key Systems
— Jack Mortlock, Commercial Director, Tonic Health Media
— Lazrus Simons, Creative Group Head, McCann Australia
— Blair Hamilford, Commercial Director Sales – Retail, oOh!media
— Roopa Fulivai, Media Marketing Manager, Adshel
— Kevin MacMillan, Founder and Creative Partner, The Works
— Jane King, Senior Marketing Director, APN Outdoor
— Matthew Byrne, Director, ROVA Media
— Julie Faktor, Creative Director, Yonder Creative
TECHNOLOGY, INNOVATION & RESEARCH

Technology has completely transformed the way we communicate and Out-of-Home (OOH) advertising has embraced these advances to improve the channel for advertisers. Digital, interactive, experiential, data-driven and dynamic, today OOH can transcend traditional media categories and help advertisers impact consumers better than ever before.

INDUSTRY AUTOMATION: THE AUTOMATED TRANSACTION PLATFORM

On the fifth anniversary of MOVE, plans were announced for the next innovation project – an industry-wide Automated Transaction Platform (ATP).

The ATP will make it easier for agencies and clients to plan and buy Outdoor media by creating a one-stop hub which amalgamates the industry. The ATP will ensure future growth and evolve the way the industry works with advertisers.

The platform will be super-charged through the integration of MOVE data and third party geodata, and will have the capability for users to upload their own proprietary consumer geodata. Designed to be developed and launched in phases, the first phase of the ATP will concentrate on automating current processes, including the integration of industry formats and inventory, selling and buying workflows, as well as post analysis and billing connections. This phase is expected to be in market in 2017, with future roll-outs to include automated trading and programmatic trading.

TECHNOLOGY

Technology has strengthened the impact of OOH, taking it from a passive medium to one that can be fully interactive; a potential one-stop shop for promotion, engagement and transaction. WiFi, Quick Response (QR) codes, Near-Field Communication (NFC), mobile technology, special builds as well as Motion and Gesture Recognition, have opened a world of choices for OOH campaigns. The creative process of developing OOH is also taking on new dimensions.

Here are some of the innovative developments from OMA members in 2015.

Adshel switched on a state-of-the-art roadside digital network across 270 locations in Australia and 35 premium locations in Auckland. Additionally, a national beacon network was installed in more than 3,000 unique locations across the network of advertising panels.

APN Outdoor continued its airport expansion and digitisation at Sydney Airport with 83 new sites and 75 digital upgrades at Domestic Terminal 2. Additionally, the company executed an expansion of its digital rail package with the addition of the XtrackTV network into Adelaide and Brisbane, along with the growth of its Elite Screen Network.

Bishopp Outdoor Advertising launched its first digital billboards in Fortitude Valley.

iOM expanded its assets with the construction of new digital screens and the conversion of static billboards to digital, to accommodate its online and offline integration strategy.
JCDecaux received approval from the City of Sydney (CoS) for the first phase of a state-of-the-art roll-out of 24 digitised panels, which includes an interactive digital platform dedicated to the sharing of CoS cultural events, community information and services.

oOh!media EXCITE retail screens were launched, combining a range of interactive multimedia technologies with each panel. This enabled advertisers and consumers to link-up, through the integration of creative with online, mobile and social media channels.

QMS Media expanded its portfolio from three to 28 landmark digital billboards. Along with the roll-out, was the implementation of dynamic advertising and creative content using features such as live RSS feeds, which integrate with social media.

**INNOVATION**

ADLED commissioned its first iconic super-site in Brisbane. As part of the construction of this large LED billboard, ADLED took an innovative step in cladding the entire building to reinvigorate and update the sign’s built environment.

Executive Channel Network (ECN) introduced in-lift content solution technology via its Smart Lift Media Player, delivering dynamic content in numerous premium locations. Additionally, ECN released a new proprietary platform that provides an interactive way to create campaigns with social media integration.

goa launched ‘Connect’, which allows advertisers to seamlessly broadcast live copy and stream audience generated content from Twitter and Instagram. In addition, ‘goa Fame’ was launched as a platform that allows the general public to buy a billboard for a day to make friends and family famous.

JCDecaux launched its new media planning tool ORBIT. This allows advertisers to analyse the impact and relevance of campaigns across the JCDecaux network by fusing key data sources to enable geospatial visualisation of granular demographic data.

oOh!media launched a new digital advertising network at baggage carousels across all capital city airports, featuring high-definition screens capable of running full-motion animation and audio content. oOh!media acquired INLINK, which enhances the company’s digital offering with reach to CBD audiences through office tower screens.

ROVA Media began to gain traction in the Victorian market with taxi wraps and decals.

Tonic Health Media acquired INFO-MED, which will enable health and lifestyle advertisers access to quality TV production and distribution via both TV and print advertising in medical waiting rooms.

TorchMedia added a dynamic format to its expanding transit portfolio with Sydney Light Rail external and internal advertising.

**RESEARCH**

Adshel commissioned a neurological study that looked at the relationship between campaign effectiveness and context across digital OOH. The study found that contextually relevant advertising was 19% more effective than non-contextually relevant advertising. It was found that advertising in context increases visual attention, emotional intensity and engagement, leading to great memory encoding – a key influencer of consumer behaviour.

APN Outdoor released #myrealworld, a study that showed that Australians are exposed to transit advertising multiple times throughout each and every day, engaging with the same and different advertisements multiple times a week. The research found that transit advertising is not only welcomed, it is liked and embraced by consumers and drives meaningful and immediate action on-the-spot via smart devices, and after the fact in the shops.

JCDecaux launched the Pigeon Project, a research tool used to actively engage with audiences across Brisbane, Melbourne and Sydney. The platform allowed questions to be asked that brands wanted answered, giving more in-depth knowledge of the marketplace. The findings were fed directly back to brands – hence, the Pigeon effect – giving them a pool of comprehensive and discerning information.

oOh!media released its Neuro Iconic Trigger research study related to the impact of using an iconic image in OOH advertising. The study involved identifying the iconic trigger images of 60 TV commercials, along with neural testing to identify the impact of using these images in the OOH signage environment. The results revealed that by using iconic moments in a TV commercial or video pre-roll and applying it to OOH environments, an advertiser could increase a respondent’s long-term memory measure by an average of 42%.
“I think the most exciting thing for Outdoor at the moment is the transformation of the whole industry, by adopting new technology and adapting it to Outdoor.”

RICHARD HERRING, CEO, APN OUTDOOR
ENVIRONMENT & SUSTAINABILITY

As the peak representative body for the Australian Out-of-home (OOH) industry, the OMA recognises its responsibility for minimising the impact of the industry’s operations on the built and natural environments and for contributing to the sustainability of the communities in which it operates.

To this end, the OMA assists its members by:

— Monitoring and reporting on evolving OOH technologies that reduce the impact of OOH on the built and natural environment
— Working with member companies to establish achievable and measurable industry-wide environmental initiatives, including:
  • Coordinating industry-wide support for programs to reduce waste generation, including recycling programs for advertising skins (vinyl)
  • Coordinating industry-wide initiatives that provide sponsorship or in-kind support towards community causes and not-for-profit organisations
  • Consulting on a regular basis with regulatory agencies and other key stakeholders on the planning and integration of OOH to add to the public benefit
  • Communicating openly and constructively with relevant authorities, government agencies and the community on sustainability and environmental issues that relate to the OOH industry
  • Supporting members’ own environmental and sustainability policies through targeted promotion and education among internal and external stakeholders.

OMA MEMBER INITIATIVES

OMA members’ environmental and sustainability policies are supported by the Association and initiatives such as recycling continue to be embraced, extending from paperless office practices to recycling of billboard skins.

Adshel, APN Outdoor, JCDecaux and oOh!media all achieved their ISO14001 accreditation/certification – the program that sets out the criteria for an environmental management system.

Adshel completed the final stage of a three-year national sustainability and efficiency project using deionised and purified water in a low-pressure cleaning system to clean its bus shelters. This system eliminates the need for detergents, reduces water consumption and creates minimal stormwater run-off. During the year, Adshel also piloted a glass reuse project in Western Australia, in partnership with Sita Australia, repurposing shattered safety glass. It is anticipated this project will extend nationally in 2016, with a target of zero glass waste. Other national environmental achievements by Adshel include:

— LED Vivacity Diffuser upgrade, reducing energy consumption
— Continued installation and renewal of solar generating sites
— LED lighting replacement, reducing energy consumption
— Steel and aluminium recycling
— Paper and poster recycling and repurposing.

The company continues to invest in and explore new ways of minimising energy consumption and to reuse and recycle all by-products.

APN Outdoor considered energy consumption a key selection criterion when procuring digital LED and LCD technology. It used LED technology for all new illuminated sites, as well as using LED to upgrade a number of billboards and replace office lighting. The company continued focusing on waste segregation and recycling, and contributed to research into recycling banner vinyl.

Cactus Imaging significantly reduced production wastage through Lean Manufacturing and continued research into recyclable material.

goa undertook several environmental initiatives, including upgrades to its digital screens network to use up to 50% less power. It switched to full electronic invoicing to reduce paper consumption, with the sales and marketing staff beginning the move to a paperless office. goa’s waste paper is recycled by an environmentally-friendly shredding company.

iOM implemented internal office initiatives including power wastage and paper reduction.

JCDecaux has a fully developed, implemented and maintained Environment Management System that is recognised both locally and globally. The company has a bronze award from the NSW Office of Environment and Heritage under its Sustainability Advantage Recognition Scheme.
Metrospace has a skin recycling process in place and has changed a large percentage of its globes and lighting assemblies to more energy efficient products.

MMT Print minimises waste by evaluating operations for top efficiency. It promotes recycling and also sources and promotes a product range that minimises the environmental impact of production and distribution.

oOh!media’s Environmental Management Plan encourages all staff to be good environmental citizens. oOh!media continued its energy-saving measures in 2015 by using LEDs, recycling waste paper and billboard skins and repurposing panels. In the past three years it has reduced the energy consumption on its shopping centre panels from 550kw to 75kw, resulting in cost savings and a reduction in carbon.

Omnographics recycles all banner wastage materials and, where possible, uses environmentally-friendly packaging and recycled products.

Paradise Outdoor Advertising started the switch to LED lighting for illuminated sites in 2015 and has started trialing solar power on a number of sites. It also increased the number of digital billboards it operated.

Prime Signs is continually increasing its recycling activity to include vinyl banners and cardboard.

QMS Media and its printing divisions recycle materials including inks, solvents, packaging materials, wooden crates and banners. It ensures all waste material – including paper, plastics and metal – is separated and properly disposed of.

Tayco Outdoor Advertising upgraded its lightboxes to LED.
PERFORMANCE

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.

OOH experienced its sixth year of consecutive revenue growth in 2015, posting a 17% increase on net revenue year-on-year, taking the industry’s revenue to an all-time high of $677.8 million, up from $579.3 million* in 2014.

In 2015, the industry was off to a stellar start with a 21.6% year-on-year increase for quarter one. In quarters two and three, the double digit growth continued, with a 16.3% and 14.2% increase, respectively. The year ended with a strong finish in quarter four, showing net revenue up by 16.6% to $213.5 million.

In 2015, the demand for immediacy and flexibility drove an uplift in digital OOH revenue, representing 28% of total OOH revenue – an increase from 2014 when it was 17% of total revenue.

Outdoor audiences continue to grow ahead of population growth and in 2015 MOVE showed audiences grew 3.4%.

“I’m very proud of the people who work in the industry: the diversity, the quality and the talent the industry attracts certainly assures we have a better chance of achieving our targets.”

BRENDON COOK, CEO, OOH!MEDIA

*2014 figures have been adjusted to reflect changes in OMA membership, as well as a minor adjustment due to over-reporting.
PERFORMANCE BY QUARTER 2015
— First quarter net revenue increased by 21.6% to $147.9 million, up from $121.7 million in 2014
— Second quarter net revenue increased by 16.3% to $154.9 million, up from $133.2 million in 2014
— Third quarter net revenue increased by 14.2% to $161.5 million, up from $141.4 million in 2014
— Fourth quarter net revenue increased by 16.6% to $213.5 million, up from $183 million in 2014.

PERFORMANCE ACROSS FORMATS 2015**
— Roadside billboards (over and under 25 square metres) $242.1 million
— Roadside other (bus/tram externals, small format, street furniture and taxis) $208.6 million
— Transport (including airports) $126.4 million
— Retail/Lifestyle/Other $100.7 million.

Note: 2014 figures have been adjusted from previously reported revenue to reflect changes in OMA membership, allowing direct comparisons in revenue year-on-year.

*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.

**Figures may not add to total due to rounding.
### Benchmarks

#### Economic

Commercial Economic Advisory Service of Australia (CEASA) reported the Out-of-Home share of advertising spend in 2015 at 5.3% of the $12.8 billion total spend.

![Circle diagram showing media share results for 2015.]

#### % Share by Media Results

<table>
<thead>
<tr>
<th>Media Type</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014*</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out-of-Home</td>
<td>4.6</td>
<td>4.6</td>
<td>4.8</td>
<td>5.1</td>
<td>5.3</td>
</tr>
<tr>
<td>Cinema</td>
<td>0.7</td>
<td>0.8</td>
<td>0.9</td>
<td>0.8</td>
<td>0.9</td>
</tr>
<tr>
<td>Newspaper</td>
<td>22.1</td>
<td>18.9</td>
<td>16.6</td>
<td>15.0</td>
<td>12.7</td>
</tr>
<tr>
<td>Magazine</td>
<td>5.6</td>
<td>4.4</td>
<td>3.5</td>
<td>3.0</td>
<td>2.4</td>
</tr>
<tr>
<td>TV</td>
<td>33.1</td>
<td>31.8</td>
<td>30.6</td>
<td>29.3</td>
<td>26.7</td>
</tr>
<tr>
<td>Pay TV</td>
<td>3.7</td>
<td>4.0</td>
<td>4.4</td>
<td>4.1</td>
<td>4.0</td>
</tr>
<tr>
<td>Radio</td>
<td>9.4</td>
<td>9.3</td>
<td>9.0</td>
<td>9.0</td>
<td>8.7</td>
</tr>
<tr>
<td>Online</td>
<td>19.0</td>
<td>24.5</td>
<td>28.4</td>
<td>32.9</td>
<td>38.3</td>
</tr>
<tr>
<td>Other Print*</td>
<td>1.8</td>
<td>1.7</td>
<td>1.8</td>
<td>0.8</td>
<td>1.0</td>
</tr>
</tbody>
</table>

Source: CEASA (excluding classifieds and directories).

*Other Print includes business and rural publications.

*2014 figures have been adjusted to reflect changes in online media reporting methodology.
MEDIA AGENCY ATTITUDES ABOUT THE INDUSTRY
The Media i industry survey collates attitudes and opinions on issues that are affecting the advertising industry and tracks the sentiments and performance of agencies, media channels and media owners’ sales representation.

The latest survey was conducted in October 2015, with more than 3,495 respondents. As voted by agency personnel, it reported that after digital and mobile, the Out-of-Home (OOH) industry rated second best in the following categories:
— Changing with the times
— Engaging consumers
— Revenue growth

PEOPLE
The survey also gauged the feelings and perceptions of people working on the media-owner side of the industry. It showed, for the third year in a row that people working in OOH are notably more optimistic and positive about the industry and they feel valued and enjoy their workplace culture.

The 2015 Media i survey also showed that of all the media channels surveyed (Outdoor/Cinema, Newspapers, Digital/Online, Magazines, TV and Radio), OOH employees are the happiest, with 33% of the 307 OOH respondents rating themselves a 9/10 on the happiness scale. All those happy vibes mean they also feel the most rewarded for their work (79%) and are least likely to be actively looking for another job (14%).
The following individuals and sales teams were recognised at the Media i Awards in November, which recognise sales excellence for teams and individuals across all media channels. Voted by agency professionals, the awards program seeks to improve the understanding and appreciation of the sales process in delivering media excellence.

OMA members won two of the five State Sales Team of the Year awards, as well as the coveted National Sales Team of the Year award.

**MEDIA i AWARDS OUTDOOR/CINEMA CATEGORY**
- Phil Dada, APN Outdoor
  Western Australia Salesperson of the Year
- Brad Montgomery, JCDecaux
  Victoria Salesperson of the Year
- Louise Nicholls, JCDecaux
  Queensland Salesperson of the Year
- Thea Petros, APN Outdoor
  South Australia Salesperson of the Year
- Debbie Webb, APN Outdoor
  New South Wales Salesperson of the Year

**MEDIA i AWARDS MEDIA OWNER CATEGORIES**
- APN Outdoor
  - National Sales Team of the Year
  - Victoria, Sales Team of the Year
  - Western Australia, Sales Team of the Year
## TOP ADVERTISING CATEGORIES

### TOP 20 ADVERTISING CATEGORIES

<table>
<thead>
<tr>
<th>2015</th>
<th>2014</th>
<th>CATEGORY</th>
<th>OUT-OF-HOME</th>
<th>ALL MEDIA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>2015 $M</td>
<td>2014 $M</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td>Retail</td>
<td>77.6</td>
<td>67.9</td>
</tr>
<tr>
<td>2</td>
<td>3</td>
<td>Entertainment &amp; Leisure</td>
<td>56.2</td>
<td>62.5</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Finance</td>
<td>54.1</td>
<td>76.3</td>
</tr>
<tr>
<td>4</td>
<td>4</td>
<td>Communications</td>
<td>52.9</td>
<td>48.7</td>
</tr>
<tr>
<td>5</td>
<td>6</td>
<td>Motor Vehicles</td>
<td>48.9</td>
<td>40.5</td>
</tr>
<tr>
<td>6</td>
<td>5</td>
<td>Travel/ Accommodation</td>
<td>41.4</td>
<td>41</td>
</tr>
<tr>
<td>7</td>
<td>8</td>
<td>Food</td>
<td>36.5</td>
<td>32.5</td>
</tr>
<tr>
<td>8</td>
<td>7</td>
<td>Media</td>
<td>32.2</td>
<td>38.4</td>
</tr>
<tr>
<td>9</td>
<td>12</td>
<td>Beverages- Non Alcoholic</td>
<td>32.1</td>
<td>23.3</td>
</tr>
<tr>
<td>10</td>
<td>9</td>
<td>Beverages-Alcoholic</td>
<td>26.9</td>
<td>26.7</td>
</tr>
<tr>
<td>11</td>
<td>10</td>
<td>Government</td>
<td>24.2</td>
<td>24.9</td>
</tr>
<tr>
<td>12</td>
<td>13</td>
<td>Education &amp; Learning</td>
<td>22.5</td>
<td>20.5</td>
</tr>
<tr>
<td>13</td>
<td>11</td>
<td>Appliances Home &amp; Outdoor</td>
<td>22.5</td>
<td>23.9</td>
</tr>
<tr>
<td>14</td>
<td>16</td>
<td>Real Estate</td>
<td>18.1</td>
<td>13.1</td>
</tr>
<tr>
<td>15</td>
<td>14</td>
<td>Insurance</td>
<td>18</td>
<td>20.3</td>
</tr>
<tr>
<td>16</td>
<td>19</td>
<td>Services</td>
<td>16.2</td>
<td>10.5</td>
</tr>
<tr>
<td>17</td>
<td>15</td>
<td>Clothing &amp; Accessories</td>
<td>15.5</td>
<td>13.9</td>
</tr>
<tr>
<td>18</td>
<td>17</td>
<td>Computers</td>
<td>13.9</td>
<td>12.2</td>
</tr>
<tr>
<td>19</td>
<td>21</td>
<td>Gambling/Gaming</td>
<td>11.8</td>
<td>8.2</td>
</tr>
<tr>
<td>20</td>
<td>18</td>
<td>Community/Public Service</td>
<td>10.8</td>
<td>11</td>
</tr>
</tbody>
</table>

*Source: Nielsen AIS*

## TOP ADVERTISERS

### TOP 20 ADVERTISERS

<table>
<thead>
<tr>
<th>2015</th>
<th>2014</th>
<th>ADVERTISER / GROUP</th>
<th>OUT-OF-HOME</th>
<th>ALL MEDIA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>2015 $M</td>
<td>2014 $M</td>
</tr>
<tr>
<td>1</td>
<td>5</td>
<td>SingTel Group</td>
<td>17.9</td>
<td>13</td>
</tr>
<tr>
<td>2</td>
<td>4</td>
<td>Lion</td>
<td>17.5</td>
<td>13.7</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>Government NSW</td>
<td>12.2</td>
<td>15.1</td>
</tr>
<tr>
<td>4</td>
<td>11</td>
<td>Coca Cola Amatil (Aust) P/L</td>
<td>11.9</td>
<td>9.4</td>
</tr>
<tr>
<td>5</td>
<td>14</td>
<td>Government - Commonwealth</td>
<td>11.5</td>
<td>8.7</td>
</tr>
<tr>
<td>6</td>
<td>8</td>
<td>Telstra Corp Limited</td>
<td>10.8</td>
<td>11.4</td>
</tr>
<tr>
<td>7</td>
<td>7</td>
<td>Westpac Banking Corporation</td>
<td>10.6</td>
<td>11.6</td>
</tr>
<tr>
<td>8</td>
<td>22</td>
<td>Samsung Electronics Aust P/L</td>
<td>10.1</td>
<td>5.3</td>
</tr>
<tr>
<td>9</td>
<td>3</td>
<td>ANZ Banking Group Ltd</td>
<td>9.4</td>
<td>14.2</td>
</tr>
<tr>
<td>10</td>
<td>13</td>
<td>McDonalds Family Restaurants</td>
<td>9.1</td>
<td>9.1</td>
</tr>
<tr>
<td>11</td>
<td>10</td>
<td>Village Roadshow Group</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>12</td>
<td>1</td>
<td>HSBC</td>
<td>8.9</td>
<td>18.6</td>
</tr>
<tr>
<td>13</td>
<td>21</td>
<td>Woolworths Limited</td>
<td>8.3</td>
<td>5.7</td>
</tr>
<tr>
<td>14</td>
<td>6</td>
<td>Wesfarmers Limited</td>
<td>8.1</td>
<td>11.7</td>
</tr>
<tr>
<td>15</td>
<td>16</td>
<td>Government - Queensland</td>
<td>7.4</td>
<td>7.5</td>
</tr>
<tr>
<td>16</td>
<td>12</td>
<td>Government - Victoria</td>
<td>6.8</td>
<td>9.2</td>
</tr>
<tr>
<td>17</td>
<td>20</td>
<td>Qantas Airways Ltd</td>
<td>6.6</td>
<td>6.4</td>
</tr>
<tr>
<td>18</td>
<td>17</td>
<td>Unilever Australia</td>
<td>6.6</td>
<td>7.2</td>
</tr>
<tr>
<td>19</td>
<td>15</td>
<td>Commonwealth Bank Australia</td>
<td>6.6</td>
<td>7.8</td>
</tr>
<tr>
<td>20</td>
<td>18</td>
<td>Foxtel</td>
<td>6.4</td>
<td>6.6</td>
</tr>
</tbody>
</table>

*Source: Nielsen AIS*
“In 2015, the OMA’s 32 members represented approximately 90% of the Out-of-Home advertising industry in Australia and generated approximately 90% of the industry’s revenue.”

CHARMAINE MOLDRICH, CEO, OMA & MOVE
MEMBERSHIP

There are three categories of OMA membership: Media Display, Non-Media Display and Asset Owners. Applications for membership are approved by the OMA’s Board of Directors.

The OMA’s charter is to serve its members by promoting the industry and developing constructive relations with primary stakeholders.

—

BENEFITS TO MEMBERS

Members form a vital network that is actively promoted, supported and consulted by the OMA. Members also benefit from the lobbying and advocacy that the OMA conducts on their behalf on regulatory and assessment issues. Other opportunities available to OMA members include participation in:

— Discussions and meetings on legislative and regulatory issues
— OMA sponsored industry seminars, events and awards
— The development of custom research to advance the industry
— The development of industry standards and guidelines.

As well as access to:

— The Media Federation of Australia and Australian Association of National Advertisers accredited audience measurement system, MOVE, electronic newsletters, media releases and media summaries, assistance and regular updates on industry legislative, regulatory and legal issues, including:
  • Confidential industry revenue reports
  • Industry-specific, customised WHS materials
  • Individual council development control plans.

And company promotion to:

— Advertisers
— Creative agencies
— Industry stakeholders
— Media
— Media agencies

CODE OF ETHICS

The OMA’s Code of Ethics outlines voluntary principles that all members must adhere to, relating to working with advertisers and regulators and responsibilities towards the community and the environment.

The OMA’s Code of Ethics is found on page 56.

WORK HEALTH & SAFETY

The OMA has developed a Work Health & Safety program to assist installation and production members to meet their risk management responsibilities. The program aims to:

— Improve the competency of supervisors in risk management principles
— Educate supervisors working within the industry on how to better communicate and consult with employees in identifying and controlling identified hazards and risks
— Improve accuracy of risk assessments, allowing for improved documentation of risk controls
— Create an ongoing resource that addresses language and literacy barriers for employees working in high-risk situations.

These resources are available at www.oma.org.au/regulation-and-community/work-health-and-safety
MEMBERS

In 2015, the OMA had a total of 32 members.

MEDIA DISPLAY COMPANIES
OMA media display members advertise third party* products on both digital and static signs across a variety of OOH formats and locations; airports, bicycle stations, billboards, buses, bus stations, cafes, doctors’ surgeries, free-standing advertisement panels, medical centres, office buildings and lifts, pedestrian bridges, railway stations, shopping centres, taxis, trains, trams, universities and street furniture (bus/tram shelters, public toilets, telephone booths and kiosks).

OMA media display members include:
- Adshel
- APN Outdoor
- Bailey Outdoor Advertising
- Bishop Outdoor Advertising
- Executive Channel Network
- goa
- iOM
- JCDecaux
- Metrospace
- oOh!media
- Outdoor Systems
- Paradise Outdoor Advertising
- QMS Media
- ROVA Media
- Savage Outdoor
- Tayco Outdoor Advertising
- Tonic Health Media
- TorchMedia

NON-MEDIA DISPLAY COMPANIES
Non-media display companies include printers (and printing materials suppliers), installers, maintenance fabrication companies and other producers of billboard skins and vinyls used for OOH advertisements.

OMA non-media display members include:
- ADLED
- Adstream
- Cactus Imaging
- Coresafe
- Country Outdoor Signs
- Daktronics
- Key Systems
- MMT Print
- Omnicraphics
- Prime Signs
- Rojo Pacific
- Ultimate Sign Installation

ASSET OWNERS
Asset owners own the space upon which the OOH advertising stands.

OMA members that are asset owners include:
- Roads and Maritime Services NSW
- Sydney Airport

*Advertising in which the advertisement is not associated with the premises. That is, where a land or asset owner allows an Outdoor media display company to display an advertisement for a third party company or product.
OMA COMMITTEES

There are four OMA committees appointed by the Board to assist in identifying and managing key issues affecting the industry. The committees comprise of senior staff from the OMA’s membership base.

— **FINANCE COMMITTEE**

The Finance Committee signs off on the OMA’s monthly and quarterly revenue reports. The committee also provides strategic advice on all OMA and MOVE financial matters. There were two meetings of the Finance Committee in 2015.

— Wayne Castle, APN Outdoor
— Chris Hunt, Adshel
— Peter McClelland, oOh!media
— Charmaine Moldrich, OMA (Chair)
— Brendan O’Neil, JCDecaux

— **MARKETING COMMITTEE**

The 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 four meetings of the Marketing Committee in 2015.

— Kathleen Beddoes, Adshel
— Michaela Chan, oOh!media
— Cassie Day, oOh!media
— Kirsty Dollisson, TorchMedia
— Nick Errey, oOh!media
— Ti-Ahna Firth, OMA
— Robyn Fok, Adshel
— Roopa Fullivai, Adshel
— Kathy Hamill, OMA (Chair)
— Amie Hine, TorchMedia
— Ailing Huang, OMA
— Jane King, APN Outdoor
— Meg McGinty, goa
— Romy Sedman, JCDecaux
— Charlotte Valente, Adshel
— Essie Wake, JCDecaux
— Janine Wood, APN Outdoor

— **WORK HEALTH & SAFETY COMMITTEE**

The Work Health & Safety (WHS) Committee oversees matters relating to WHS issues affecting the industry. Two meetings were held in 2015. Members also provided input into a range of policy matters as they arose.

— Glenn Badcock, JCDecaux
— Brian Freeman, oOh!media
— Kevin Hoult, Prime Signs
— Tess Phillips, OMA (Chair)
— Ajay Powell, APN Outdoor

— Craig Pritchard, Country Outdoor Signs
— Rosemary Roberts, oOh!media
— Blair Robertson, Daktronics
— Michael Saunders, Adshel
— Nigel Spicer, Cactus Adshel
— Cathy Towers, OMA
— Pete Tyquin, goa
— Dom Weir, Coresafe
— Collin Willshire, Prime Signs

— **REGULATORY AFFAIRS COMMITTEES**

The Regulatory Affairs Committees oversee all regulatory matters affecting the industry. In 2015, the Committees focused on a number of regulatory issues in New South Wales, Victoria and Queensland. There were three meetings in New South Wales and two each in Victoria and Queensland.

— **NEW SOUTH WALES**

— Kelly Ainley, Adshel
— Anita Burgermeister, oOh!media
— Michael Cali, oOh!media
— Bronwyn Clementson, APN Outdoor
— Mark Hundal, Adshel
— Graham Johanson, oOh!media
— Melissa Maggs, goa
— Stuart Moffatt, Adshel
— Steve O’Connor, JCDecaux
— Daniel Owen, IOM
— Tess Phillips, OMA (Chair)
— Damien Rath, APN Outdoor
— Blair Robertson, Daktronics
— Cathy Towers, OMA
— Andrew Tyquin, Outdoor Systems
— Brian Tyquin, Outdoor Systems
— Matthew Vincent, JCDecaux
— Diana Woolridge-Jones, Adshel

— **VICTORIA**

— Luke Brett, oOh!media
— Steve Danaher, QMS Media
— Peter Franklin, APN Outdoor
— Mark Hundal, Adshel
— Stuart Moffatt, Adshel
— Charmaine Moldrich, OMA
— Tess Phillips, OMA (Chair)
— Cathy Towers, OMA
— Matthew Vincent, JCDecaux
— Adam Whitford, IOM
— Leah Whitford, IOM
QUEENSLAND
— Kelly Ainley, Adshel
— Hulwina Azmi, APN Outdoor
— Peter Bailey, Bailey Outdoor Advertising
— Brad Bishopp, Bishopp Outdoor Advertising
— Shabana Hanif-Saheed, Bishopp Outdoor Advertising
— Kevin Holt, Prime Signs
— Mark Hundal, Adshel
— Mitch James, Paradise Outdoor Advertising
— Graham Johanson, oOh!media
— Christian Kwakkenaat, Adshel
— Brad Lindsay, APN Outdoor
— Melissa Maggs, goa
— Stuart Moffatt, Adshel
— Charmaine Moldrich, OMA
— Nick McAlpine, Bishopp Outdoor Advertising
— Tess Phillips, OMA (Chair)
— Peter Savage, Metrospace Outdoor Advertising
— Rod Taylor, Tayco Outdoor Advertising
— Cathy Towers, OMA
— Chris Tyquin, goa
— Matthew Vincent, JCDecaux
— Chris White, ADLED
— Collin Willshire, Prime Signs
— Diana Woolridge-Jones, Adshel
MOVE COMMITTEES

In 2015, four board-appointed committees supported and contributed to the ongoing management and development of MOVE, as well as the development and communication of Out-of-Home (OOH) research.

INDUSTRY USER GROUP
The Industry User Group (IUG) comprises senior planners and OOH buyers from major advertising agencies together with a MOVE Board representative, the OMA/MOVE CEO and MOVE staff. The IUG provides strategic advice and counsel about issues involving MOVE, from the point of view of advertising planners, and ensures users’ interests are at the forefront of MOVE and its development. There were two meetings of the IUG in 2015.

— Tione Blackley, Group M
— Craig Cooper, Starcom MediaVest Group
— Victor Coronas, Magnaglobal
— Jo Dick, OMD
— Jackie Edwards, Magnaglobal
— Kylie Green, MOVE
— Grant Guesdon, MOVE
— Kathy Hamill, OMA
— Charmaine Moldrich, OMA/MOVE
— Steve O’Connor, OMA/MOVE (Chair)
— Cassandra Thomas-Smith, Posterscope

TECHNICAL COMMITTEE
The Technical Committee (TECHCOM) comprises technical representatives from each of the major operator owners of MOVE, a representative of MOVE’s modelling contractor, Veitch Lister Consulting (VLC) and, is supported by MOVE staff. TECHCOM oversees all of MOVE’s technical development and modelling matters. This includes data updates and software updates, as well as modelling and technical developments that are used to derive OOH measurement results. There were eight meetings of TECHCOM in 2015.

— Yasmin Berry, oOh!media
— Leah Buckley, Adshel
— Charlotte Chaouka, JCDecaux
— Jamie Cook, VLC
— Tara Coverdale, oOh!media
— Kylie Green, MOVE
— Grant Guesdon, MOVE (Chair)
— Kathy Hamill, OMA
— Sarah Hughes, Adshel
— Meg McGinty, goa
— Robyn Merritt, Adshel
— Leigh Morris, goa
— Francesca Ryan, APN Outdoor
— Jordana Sherlock, APN Outdoor
— Cristina Smart, JCDecaux
— Janine Wood, APN Outdoor
JOINT ACTION GROUP
The Joint Action Group (JAG) comprises sales and marketing directors, as well as research and insights teams, from each of the major operators in MOVE. Its mandate is to develop and promote education and research programs to take to market. There were two meetings of JAG in 2015.

— Yasmin Berry, oOh!media
— Tara Coverdale, oOh!media
— Mark Fairhurst, APN Outdoor
— Kylie Green, MOVE
— Grant Guesdon, MOVE
— Kathy Hamill, OMA
— Meg McGinty, goa
— Charmaine Moldrich, OMA/MOVE (Chair)
— Bruce Mundell, oOh!media
— Steve O’Connor, JCDecaux
— Jordana Sherlock, APN Outdoor
— Charlotte Valente, Adshel
— Essie Wake, JCDecaux
— Janine Wood, APN Outdoor

AUTOMATED TRANSACTION PLATFORM WORKING COMMITTEE
The Automated Transaction Platform (ATP) Working Committee was added in 2015 to assist the board with defining the technical specification for the industry’s new automated transaction platform currently in design stage. The ATP Working Committee met twice in 2015.

— Alex Black, Adshel
— Cassandra Collins, APN Outdoor
— Noel Cook, oOh!media
— Luke Franklin, Bishopp Outdoor Advertising
— Jane Garry, Adshel
— Kylie Green, MOVE
— Grant Guesdon, MOVE
— Andrew Hines, APN Outdoor
— Gary Howells, Adshel
— Emily Lewis, ROVA Media
— Meg McGinty, goa
— Charmaine Moldrich, OMA/MOVE (Chair)
— Oliver Newton, JCDecaux
— Daniel Owen, iOM
— Charles Parry-Okeden, Executive Channel Network
— John Purcell, oOh!media
— Tom Sandow, JCDecaux
— Cristina Smart, JCDecaux
— Chris Tyquin, goa
— Mike Tyquin, Adshel
— Andrew Walls, oOh!media
— Daniel Wunsch, Executive Channel Network
OMA MEMBER COMPANIES

MEDIA DISPLAY COMPANIES

Adshel is the leading provider of advertising-funded street furniture and digital Out-of-Home (OOH) solutions in Australia and New Zealand. As a key player in the OOH media market, Adshel offers the largest street furniture coverage in the country, a cutting-edge innovation portfolio and a robust research program, alongside unparalleled reach, engagement opportunities and insights to make its clients’ OOH advertising count.
adshel.com.au

APN Outdoor Group Limited is a publicly-listed company on the Australian Stock Exchange. As progressive leaders in Outdoor advertising across Australia and New Zealand, APN Outdoor has over 36,000 high-impact sites in attention-grabbing locations, allowing clients to reach more of their potential customers, more often. APN Outdoor is committed to driving the industry forward and is constantly investing in research, innovation and cutting-edge digital developments to produce improved results for advertisers.
apnoutdoor.com.au

Bailey Outdoor Advertising is a large-format billboard company, proudly Queensland owned and operated. Bailey has been servicing the Out-of-Home industry with large-format digital printing and signage for over 25 years.
bannerspecialists.com.au

Bishopp Outdoor Advertising started as a family business in 1993 and has grown to more than 700 large-format panels across Queensland. Bishopp’s geographic coverage, includes not only key south-east Queensland centres, but also the major regional cities and road traffic in between. Bishopp employs more than 30 staff, has strong relationships with 400-plus property owners, and was used by more than 1,000 businesses. Aside from working with national clients seeking exposure to the Queensland market, 80% of Bishopp’s advertising content is used to promote small local businesses that operate within a 20-kilometre radius of the billboard itself.
bishopp.com.au

Executive Channel Network (ECN) is a digital communication business providing major office buildings with ‘real-time’ information, connecting executives to relevant content and providing brands with a premium quality, highly-targeted advertising network for an aspirational environment. ECN Australia is part of the Executive Channel International group of companies. ECN’s brand purpose is to facilitate meaningful connections between property owners, office executives and advertisers.
exectivechannelnetwork.com.au

JCDecaux is the number one, global Out-of-Home (OOH) company, with a consistent focus on providing high-quality street furniture and OOH networks in proximity to affluent audiences. The expansive suite of premium JCDecaux products delivers unparalleled access to key metropolitan areas across Australia. With an emphasis on innovation, JCDecaux pushes the boundaries of the OOH market to engage and interact with hard-to-reach urban consumers on a more involved level.
jcdecaux.com.au

Metrospace Outdoor Advertising is a privately-owned Queensland business that has been trading since 1984. It aims to provide high-quality Outdoor signage solutions in large and medium formats across Brisbane, concentrating on quality rather than quantity. Metrospace believes this mission has largely been achieved and that its inventory quality is arguably as good as anything in the country, concentrating on spectacualrs in Brisbane’s CBD, supersites on major arteries and high profile (predominantly single-pole), illuminated 24-sheet posters across suburban Brisbane.
metrospace.com.au

iOM

Since iOM commenced business in 1994, it has remained an independent Australian-owned and managed Outdoor advertising company. The key to iOM’s success has been that it offers exceptional coverage across Melbourne metropolitan markets and the key regional centres. For clients from large corporations to sole traders, iOM delivers unique advertising solutions based on the client’s specific requirements.
iom.net.au

JCDecaux

Metrospace Outdoor Advertising is a privately-owned Queensland business that has been trading since 1984. It aims to provide high-quality Outdoor signage solutions in large and medium formats across Brisbane, concentrating on quality rather than quantity. Metrospace believes this mission has largely been achieved and that its inventory quality is arguably as good as anything in the country, concentrating on spectacualrs in Brisbane’s CBD, supersites on major arteries and high profile (predominantly single-pole), illuminated 24-sheet posters across suburban Brisbane.
metrospace.com.au
oOh! is a leading operator in Australia and New Zealand’s fast-growing Out-of-Home advertising industry. oOh!media creates deep engagement between people and brands through ‘Unmissable’ location-based media solutions. Its network is unparalleled, with a diverse portfolio of static and digital signs across roadside, retail, airport and place based media offerings in CBD office towers, cafes, fitness venues, bars and universities. oOh!media combines this extensive reach with sophisticated data, industry leading insights and world leading digital innovation, integrating their physical inventory with social and mobile online channels to provide clients with greater connections with consumers.

oohmedia.com.au

Outdoor Systems is an independent billboard media company with more than 60 years of industry experience. Outdoor Systems focuses on large-format billboards in the Sydney market, that target advertisers and the public on the move.

outdoorsystems.com.au

Paradise Outdoor Advertising is a locally-owned Townsville-based company and is the largest regional Outdoor advertising company in Queensland and the Northern Territory. Paradise offers more than 1,000 billboard locations and is growing.

paradiseoutdoor.com.au

QMS Media Limited is a publicly-listed company on the Australian Stock Exchange, focused on providing clients and agency partners with quality advertising solutions across its portfolio of products. As a leading Outdoor media company in Australia, New Zealand and Indonesia, QMS specialises in premium landmark digital and static billboards, street furniture, retail and transit media, working closely with clients to deliver the most effective Outdoor solutions that engage with customers.

qmsmedia.com

ROVA Media is Australia’s Premium Taxi Advertising Group in Sydney, Melbourne, Brisbane, Perth, Adelaide, Canberra and major and minor regional centres across New South Wales, Victoria and Queensland. ROVA taxis go where people work, shop, play and stay, dominating city centres and suburban hubs, making taxis a powerful and engaging medium. Spending the longest time on the road and travelling greater distances than any other transit product, ROVA Media provides clients with maximum reach and frequency advertising solutions with one format, across more than 110 locations Australia-wide.

rova.net.au

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

taycooutdoor.com.au

Tonic Health Media (THM) is an integrated production, broadcast and print-place-based media company, with market-leading knowledge and experience in the health and wellbeing sectors. THM’s narrowcast television system and brochure boards are installed in more than 3,500 high-flow waiting areas in general practices and hospitals within Australia. THM helps to educate and inspire people to take a more active role in their health, wellbeing and lifestyle decisions, with the technology platform enabling tailored programming to the audience.

tonichealthmedia.com.au

TorchMedia specialises in providing brands a spotlight with high-impact transit and retail Out-of-Home solutions. Its mantra is flexible, accountable campaigns that deliver brands results.

torchmedia.com.au
NON-MEDIA DISPLAY COMPANIES

ADLED

ADLED is an Australian-owned, Queensland-based provider of large-format advertising billboards. It boasts a 100% digital asset base and is one of the only companies in the industry that is vertically integrated, offering services from design and construction of digital billboards, through to the sale of advertising space. ADLED draws together experience from a number of companies, all of which have been operating in the Out-of-Home advertising and construction industries for decades.

adled.com.au

Adstream

At Adstream, new solutions are dreamed up that give media owners the power to work smarter. Adstream’s Quickcut scrutinises Out-of-Home advertisements like no other. With over 290 checks, Adstream ensures material gets to media owners looking the way it’s supposed to – perfect. Advertisements are built to spec, quality controlled, validated and delivered.

adstream.com.au

Cactus Imaging

Cactus Imaging is Australasia’s leading production house for the digital printing of large-format images. It specialises in producing frontlit and backlit billboards, truckside 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

Coresafe has been providing trusted health, safety and environmental consultancy services to OMA members for 14 years.

coresafe.com

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

cosigns.com.au

Daktronics

Since 1968, Daktronics has been reinventing the way we display. Daktronics is the world’s industry leader in designing and manufacturing electronic scoreboards, programmable display systems and large-screen video displays. Its passion is to continuously provide the highest quality standard display products, as well as custom-designed and integrated systems.

daktronics.com

Key Systems

Key Systems has been successfully supplying asset management software to Out-of-Home (OOH) media owners since 2005. Its fusion software manages traditional and digital OOH inventory, maximising the returns generated and streamlining the Outdoor advertising life cycle. Key Systems has recently expanded its business with the addition of a number of new clients. It is an international company that understands local industry requirements in all the countries it operates and is committed to long-term investment in the Australian market.

keysystemsww.com

MMT Print

MMT Print has established itself as one of the leading large-format printing businesses in Australia through significantly expanding its printing and finishing capabilities to include the production of billboards, street furniture, backlit displays, hoardings, fleet graphics, point-of-sale and signage applications with speed and precision. MMT Print’s unique technologies and premium quality have been the hallmarks of its operation since its inception in 1991.

mmtprint.com

Omnigraphics

Omnigraphics is Australia’s premier grand format digital printer, with offices in Melbourne, Sydney and representation in Adelaide, Brisbane and Perth. Omnicraphics has more diversity and range of products on offer than any other printer in Australia and is renowned for being a pioneer in the industry. Omnicraphics specialises in printing billboards, banners, street furniture, hoardings, lightboxes, point-of-purchase, retail signage and much more. Continued investment in new technologies and processes makes Omnicraphics the partner of choice for Australia’s leading brands.

omnigraphics.com.au

OUT THERE
Prime Signs is one of Australia’s leading advertising installation companies. Prime Signs is innovative, enthusiastic, passionate, respected and determined. The company’s dedication to excellence and detail has earned it a reputation for advertising installation greatness on a national level. Its demonstrated ability to commit on a successful and long-standing scale to Australia’s leading advertising agencies is admirable and well understood. More than 20 years of complete sign services experience has meshed core values with revolutionary progress and the results are consistently impressive.

Prime Signs provides advertising installations to many of Queensland’s most prominent and recognisable sites, including the Brisbane Domestic and International Airports, Queensland Rail, Westfield Shopping Centres and major buildings within the Brisbane and Gold Coast CBDs.

primesigns.com.au

Rojo Pacific imports, stocks and distributes large-format printing materials for point-of-sale, Out-of-Home signs and exhibition markets.

rojopacific.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 in between, USI does it all.

ultimatesigns.com.au

ASSET OWNERS

Roads and Maritime Services (RMS) is an operating agency within Transport for NSW. The RMS vision is to enable safe and efficient journeys throughout New South Wales. RMS develops advertising assets to provide commercial revenue annually for contribution to road and safety programs. The development program assesses each site for public safety, environmental suitability and commercial opportunities.

rms.nsw.gov.au

Sydney Airport is one of Australia’s most important pieces of infrastructure. It is the international gateway and an essential part of the transport network connecting Sydney to 44 international, 22 domestic interstate and 22 regional destinations. The location benefits both business and tourism and is a major strength underpinning Sydney’s future prosperity.

sydneyairport.com.au
“Great Outdoor advertising can make you smile. It can make you cry. It just brings forth an emotion that you didn’t expect to have at that particular point in time.”

STEVE O’CONNOR, CEO, JCDECAUX & CHAIRMAN, OMA & MOVE
Outdoor advertising is a medium that reaches almost every member of the community when they are travelling outside of their home. Outdoor advertising can be seen at any time of the day or night and cannot be turned off, fast forwarded, put aside or be left unopened. This is why it is important for the industry to have its own Code of Ethics to ensure that members operate their businesses with responsibility towards their environment.

The OMA has developed a Code of Ethics that all members must adhere to. The Code of Ethics is a set of voluntary principles that defines the industry’s standards for doing business with advertisers and regulators, and its responsibilities towards the community and the environment. They supplement the obligations that members already are required to comply with under existing law, including federal and state law, and are outlined below:

**PRINCIPLES FOR DOING BUSINESS WITH ADVERTISERS**
1. We are committed to providing the best possible Outdoor advertising sites for our advertisers that are also value for money.
2. We are committed to maintaining and improving the quality and appearance of site structures and locations to enhance their performance.
3. We observe an honest, ethical and professional approach to trading practices, media contracts and proof of performance.
4. We put genuine effort into providing research data, strategic planning, creative advice and production guidance to ensure that advertisers get the most out of their Outdoor advertising campaigns.

**PRINCIPLES OF DOING BUSINESS WITH REGULATORS**
1. We support fair and transparent tender processes for the awarding of contracts for Outdoor advertising sites.
2. We advocate the right to develop and maintain Outdoor advertising structures that are consistent with legal, regulatory and planning requirements.
3. We acquire and negotiate Outdoor advertising sites in a businesslike and competitive fashion.
4. We support Outdoor advertising as a legitimate business to be practised in appropriately-zoned areas only.

5. We advocate regulatory changes that permit the use of new Outdoor advertising technologies to enhance the service that we can offer to our advertisers.
6. We only endorse advertising that adheres to relevant codes of practice administered by the advertising industry (see below).

**RESPONSIBILITIES TOWARDS THE COMMUNITY**
1. We are committed to providing an effective form of communication for goods, services and public information of interest and/or benefit to the community.
2. We are committed to contributing to the sustainability of the communities in which we operate through initiatives identified in the OMA’s Environment and Sustainability Statement.
3. We actively support community service and charity campaigns.
4. When we receive a complaint about any advertisement we display, we refer the complainant to the Advertising Standards Bureau.
5. We support all decisions made by the Advertising Standards Board in regard to complaints about Outdoor advertising.
6. We only endorse the display of advertising that adheres to the following advertising industry codes of practice:
   - Australian Association of National Advertisers (AANA) Code of Ethics
   - AANA Environmental Claims in Advertising and Marketing Code
   - AANA Code for Advertising and Marketing Communications to Children
   - AANA Food and Beverages Advertising and Marketing Communications Code
   - Australian Food and Grocery Council Quick Service Restaurant Initiative for Responsible Advertising and Marketing to Children
   - Australian Food and Grocery Council Responsible Children’s Marketing Initiative
   - The ABAC Responsible Alcohol Marketing Code
   - The Federal Chamber of Automotive Industries’ Voluntary Code of Practice for Motor Vehicle Advertising
   - The Therapeutic Goods Advertising Code
   - The Weight Management Industry Code of Practice.
7. We are committed to the responsible advertising of alcoholic beverages, including limiting their display around schools, as outlined in the OMA’s Alcohol Advertising Guidelines.

8. We endorse and support the display of advertising for alcoholic beverages that has been approved by the Alcohol Advertising Pre-vetting System.

9. We are committed to working with road authorities to address road safety requirements for Outdoor advertising.

RESPONSIBILITIES TOWARDS THE ENVIRONMENT

1. We are committed to protecting natural scenic beauty, parks, forests and places of historic value by locating our displays near populous areas as permitted by legislation.

2. We are committed to reducing the impact of our business on the built and natural environment through initiatives identified in the OMA’s Environment and Sustainability Statement.

3. We are committed to recycling our waste materials where practicable.
<table>
<thead>
<tr>
<th>Community Sponsorship</th>
</tr>
</thead>
<tbody>
<tr>
<td>1800Respect</td>
</tr>
<tr>
<td>4 ASD Kids</td>
</tr>
<tr>
<td>Abseil for Youth</td>
</tr>
<tr>
<td>Art of the Twenty First Century Museum</td>
</tr>
<tr>
<td>Act II Foundation</td>
</tr>
<tr>
<td>Alliance Francaise French Film Festival</td>
</tr>
<tr>
<td>Amaze</td>
</tr>
<tr>
<td>ANZAC Day Challenge</td>
</tr>
<tr>
<td>Art Gallery of New South Wales</td>
</tr>
<tr>
<td>Asthma Australia</td>
</tr>
<tr>
<td>Australian Government</td>
</tr>
<tr>
<td>Australian Red Cross</td>
</tr>
<tr>
<td>Banking on Our Kids (Bank of Queensland)</td>
</tr>
<tr>
<td>Belvoir St Theatre</td>
</tr>
<tr>
<td>Beyond Blue</td>
</tr>
<tr>
<td>Big Plates 4 Little Mates</td>
</tr>
<tr>
<td>Bowel Cancer Australia</td>
</tr>
<tr>
<td>Brisbane Festival</td>
</tr>
<tr>
<td>Brisbane Open House</td>
</tr>
<tr>
<td>Bundaberg Flavours Festival</td>
</tr>
<tr>
<td>Bundaberg Multicultural Festival</td>
</tr>
<tr>
<td>Calliope Rodeo</td>
</tr>
<tr>
<td>Camp Gallipoli</td>
</tr>
<tr>
<td>Camp Quality</td>
</tr>
<tr>
<td>Cancer Council Australia</td>
</tr>
<tr>
<td>Cancer Council – Relay for Life (Queensland)</td>
</tr>
<tr>
<td>Cancer Council WA</td>
</tr>
<tr>
<td>Cerebral Palsy Alliance – Step-tenber</td>
</tr>
<tr>
<td>Church Lane Society</td>
</tr>
<tr>
<td>Charity Challenge</td>
</tr>
<tr>
<td>Childers Multicultural Festival</td>
</tr>
<tr>
<td>Children’s Hospital Foundation (Queensland)</td>
</tr>
<tr>
<td>Churches of Christ (Queensland)</td>
</tr>
<tr>
<td>Crime Stoppers</td>
</tr>
<tr>
<td>Cure Brain Cancer Foundation</td>
</tr>
<tr>
<td>Cure Cancer Australia Foundation</td>
</tr>
<tr>
<td>Danny Green’s ‘Stop the Coward Punch’ Campaign</td>
</tr>
<tr>
<td>Department of Education and Training (Queensland)</td>
</tr>
<tr>
<td>Department of Environment and Heritage Protection (Queensland)</td>
</tr>
<tr>
<td>Department for Health and Ageing (South Australia)</td>
</tr>
<tr>
<td>Department of Health and Human Services (Victoria)</td>
</tr>
<tr>
<td>General (Queensland)</td>
</tr>
<tr>
<td>Department of Justice and Attorney</td>
</tr>
<tr>
<td>Department of Planning, Transport and Infrastructure (South Australia)</td>
</tr>
<tr>
<td>Department of State Development (Queensland)</td>
</tr>
<tr>
<td>Department of Transport and Main Roads (Queensland)</td>
</tr>
<tr>
<td>Destination NSW</td>
</tr>
<tr>
<td>Drinkwise Australia</td>
</tr>
<tr>
<td>Dunlea Centre</td>
</tr>
<tr>
<td>Earth Hour</td>
</tr>
<tr>
<td>Electoral Commission (Queensland)</td>
</tr>
<tr>
<td>Energex</td>
</tr>
<tr>
<td>Flight Centre Foundation</td>
</tr>
<tr>
<td>Freeze at the ‘G’ for MND</td>
</tr>
<tr>
<td>Fringe Festival Perth</td>
</tr>
<tr>
<td>G3 Cancer Institute</td>
</tr>
<tr>
<td>Guide Dogs Queensitic Gardens (Queensland)</td>
</tr>
<tr>
<td>Health Direct</td>
</tr>
<tr>
<td>Heart Foundation</td>
</tr>
<tr>
<td>Hockey Victoria</td>
</tr>
<tr>
<td>Horizon Power</td>
</tr>
<tr>
<td>Kids Under Cover</td>
</tr>
<tr>
<td>Leukaemia Foundation</td>
</tr>
<tr>
<td>Life Without Barriers</td>
</tr>
<tr>
<td>Lockyer Valley Garden Festival</td>
</tr>
<tr>
<td>Lung Foundation</td>
</tr>
<tr>
<td>McDonalds Townsville Running Festival</td>
</tr>
<tr>
<td>Metropolitan Planning and Development (South Australia)</td>
</tr>
<tr>
<td>McGrath Foundation</td>
</tr>
<tr>
<td>McHappy Day</td>
</tr>
<tr>
<td>Melbourne International Film Festival</td>
</tr>
<tr>
<td>Motor Accident Commission (South Australia)</td>
</tr>
<tr>
<td>Movember</td>
</tr>
<tr>
<td>MS Sydney to Gong Ride</td>
</tr>
<tr>
<td>Murdoch Children’s Research Institute (Queensland)</td>
</tr>
<tr>
<td>Museum of Brisbane</td>
</tr>
<tr>
<td>Museum of Contemporary Art</td>
</tr>
<tr>
<td>National Breast Cancer Foundation</td>
</tr>
<tr>
<td>National Gallery of Victoria</td>
</tr>
<tr>
<td>National Missing Persons Week</td>
</tr>
<tr>
<td>Noosa Food and Wine Festival</td>
</tr>
<tr>
<td>NSW Government</td>
</tr>
<tr>
<td>NSW Health</td>
</tr>
<tr>
<td>Odyssey House</td>
</tr>
<tr>
<td>OpenAir Cinema</td>
</tr>
<tr>
<td>Ovarian Cancer Research Foundation</td>
</tr>
<tr>
<td>Oxfam Australia</td>
</tr>
<tr>
<td>Pink Hope</td>
</tr>
<tr>
<td>Project Everyone</td>
</tr>
<tr>
<td>Public Safety Business Agency (Queensland)</td>
</tr>
<tr>
<td>Queensland Ballet</td>
</tr>
<tr>
<td>Queensland Health Services</td>
</tr>
<tr>
<td>Queensland Government</td>
</tr>
<tr>
<td>Queensland Institute of Medical Research</td>
</tr>
<tr>
<td>Queensland Motorways</td>
</tr>
<tr>
<td>Queensland Music Festival</td>
</tr>
<tr>
<td>Queensland Police Service</td>
</tr>
<tr>
<td>Queensland Urban Utilities</td>
</tr>
<tr>
<td>Real Hope</td>
</tr>
<tr>
<td>Red Nose Day</td>
</tr>
<tr>
<td>Roads and Maritime Services (NSW)</td>
</tr>
<tr>
<td>Humpy Dumpty Foundation</td>
</tr>
<tr>
<td>Road Safety Commission (Western Australia)</td>
</tr>
<tr>
<td>Ronald McDonald House</td>
</tr>
<tr>
<td>Royal Children’s Hospital Foundation (Victoria)</td>
</tr>
<tr>
<td>Royal Flying Doctor Service of Australia</td>
</tr>
<tr>
<td>Salvation Army</td>
</tr>
<tr>
<td>RSL Victoria</td>
</tr>
<tr>
<td>RSPCA — Cupcake Day</td>
</tr>
<tr>
<td>SecondBite</td>
</tr>
<tr>
<td>Seqwater</td>
</tr>
<tr>
<td>Southern Highlands Quilters’ Guild</td>
</tr>
</tbody>
</table>
Starlight Foundation
State Library of Queensland
St Vincent de Paul
Surf Life Saving Australia
Sydney Children’s Hospital Foundation
Sydney Festival
Sydney Film Festival
Sydney Fringe Festival
Sydney Opera House
Sydney Theatre Company
Special Children’s Christmas Party (Brisbane)
The Big Issue
The Book that Money Can’t Buy
The Line
The Shepherd Centre
Tourism and Events (Queensland)
Townsville Mayor’s Christmas Tree Appeal
Transport Accident Commission (Victoria)
Transport for NSW
Very Special Kids — McHappy Day
Victorian AIDS Council
Victorian Government
Victoria Police Blue Ribbon Foundation
Vinnies CEO Sleepout
Waratahs Rugby Team
Wesley Mission Australia
Western Force Rugby
Wheelchair Sports
White NightWings for Life
Withcott Litter Prevention
Workplace Health and Safety (Queensland)
World Animal Protection Day
WWF Wild Onesie Week
YGAP
Youngcare Budgie Bolt