



The OMA office is located on the land of the Gadigal people
of the Eora nation.

We thank them for their stewardship of this land and for
sharing their traditions, stories, knowledge and intrinsic connection
to land and water with us. We look forward to future opportunities
for growth and understanding within our community and
our industry.





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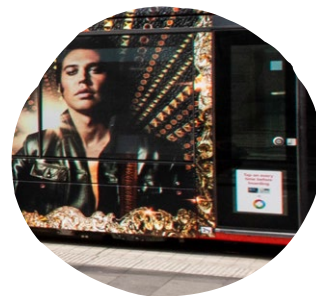
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The background features a large, stylized letter 'B' shape. The left side of the 'B' is filled with a vibrant green color, while the right side is black. The top and bottom curves of the 'B' are also filled with green, creating a high-contrast, graphic design.

INTRODUCTION



Love the sounds of the Australian Open.

love all



Scan here to access the Mastercard® Spotify hub, featuring Naomi Osaka's Love All playlist.

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Love the sounds of the Australian Open.
SCAN HERE.

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

INTRODUCTION

The OMA provides leadership across four key functions: audience measurement and data management; marketing and communications; government relations; and member services in the areas of policy, advocacy, and training.

WHO IS MOVE?

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

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

WHAT MOVE MEASURES

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

- airports
- bus and railways platforms and concourses
- office buildings, cafes, gyms, shopping centres and universities
- petrol stations and convenience stores
- public transport, including externals of buses, ferries, light rail and internals (except for trains)
- roadsides



THE YEAR IN NUMBERS

Out of Home share of total Australian advertising spend — 12.2 per cent. Up 1.7 per cent from 2021.*

12.2%

*Source: Standard Media Index (SMI). SMI figures reflect the spend by media agencies on behalf of clients, it does not include the advertising spend by advertisers who book directly with the media operator/channel.

\$126M

OMA members donated media space and services to over 200 government, arts, sports and charitable groups valued at \$126M in 2022.

\$17M committed to building new audience measurement platform MOVE 2.0.



\$17M

1,795

1,795 media agency staff and OMA members trained to use MOVE, the OOH industry's audience measurement platform.

Digital Out of Home (DOOH) revenue was 64.1 per cent of total net media revenue, an increase over the recorded 58.9 per cent for the same period last year.

64.1%

4.1%

Q4 revenue exceeded pre-pandemic revenue for the first time by 4.1 per cent.

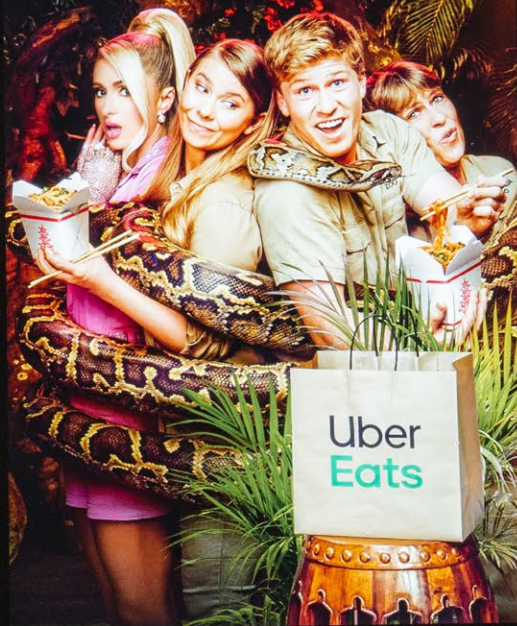
OMA members donated \$8M in media space to promote healthy food choices with a campaign in partnership with Health and Wellbeing Queensland and Nutrition Australia.

\$8M

\$1,060M

The Outdoor industry posted a record \$1,060M in net media revenue, an increase of 27.6 per cent over 2021.

Tonight,
I'll be eating
together



Uber
Eats

A hand-drawn illustration of a globe. The globe is composed of several concentric, irregular lines drawn with a black marker, creating a textured, hand-painted appearance. The lines are not perfectly circular, giving it a dynamic, organic feel. In the center of the globe, the word "TEAM" is written in a white, bold, sans-serif font. The background is a solid, vibrant blue color. The overall style is modern and artistic, suggesting a global or collaborative theme.

TEAM

CHAIRMAN'S MESSAGE

As Justin Trudeau stated at the World Economic Forum in 2018, “The pace of change has never been this fast, but it will never be this slow again.”

2022 was a terrific year of continued rebound growth post covid for the Out of Home (OOH) industry. The sector achieved \$1B in revenue and claimed 12.2 per cent¹ of the media spend from agencies.

This year also saw our increase in membership to the OMA to-date with 12 new members joining. We are now close to representing 100 per cent of the industry, including media owners, media suppliers, and asset owners.

INNOVATION PROPELS GROWTH

The rise in revenue, increase in agency spend, and attraction of new members can be attributed to our unified and collaborative approach as well as the constant innovation we bring to everything we do as an industry, from digitisation, research and development, and policy framework.

We continued to work with the Media Federation of Australia's Outdoor Futures Council (OFC) to further develop metrics and tools to help make it easier to buy OOH, as well as to prove the effectiveness of the channel.

We launched MOVE 1.5, evolved our Industry Standards and launched the Neuro Impact Factor (NIF) giving agencies and advertisers a qualitative measure to help better understand the impact of their campaigns.

This is the lead up to the jewel in our crown which will be MOVE 2.0. MOVE 2.0 will deliver accurate audience measurement of digital signs, by hour, 365 days a year and will also include classic, regional and place-based audiences. This will provide the data in a more granular way that allows for monthly and seasonal variations, as well as hourly movements. In total, the system will measure more than 100,000 OOH locations nationwide. The MOVE Board has invested \$17M to bring this to life.

WE SPEAK TO MANY

In 2023 we will pave the way for a new language that better describes how we measure OOH. Starting with the benefits of the OOH channel speaking to many,

rapidly reaching mass audiences for a fraction of the cost of other channels. Our focus on Attention, Reach and Impact will be coupled with the release of an industry Impression Multiplier that provides a standard measurement methodology for campaigns bought programmatically. A game changer for programmatic OOH buyers that will report the number of impressions a single ad play delivers.

The MOVE user feedback we received this year has resulted in several software enhancements. We've made reporting more user-friendly such as calculating CPM, building sub-areas, comparing reports, and running reports against a select market.

Our automated Insertion Order (IO) is also in development, allowing for one source of information for media owners, agencies, and verification providers. All set for release in 2023 and paving the way for what's to come with MOVE 2.0.

GLOBAL LEADERSHIP

Our innovation as an industry has gained us worldwide recognition as leaders in research and measurement for Out of Home. Charmaine, Grant and I presented at several overseas conferences in 2022, sharing insights on how we built our world-first qualitative metric, the Neuro Impact Factor. We also managed to pick up a few awards along the way; CEO Charmaine Moldrich was the joint winner of the Global Leadership Award, and oOh!media's previous CEO Brendon Cook was honoured with the Lifetime Achievement Award at the World Out of Home Organisation's Annual Conference in Toronto, Canada.

THE TIMES THEY ARE A CHANGING

It is with gratitude that we farewell our outgoing CEO, Charmaine Moldrich and we sincerely thank her for her commitment and excellent stewardship of the OMA.

Our new CEO, Elizabeth McIntyre picks up the mantel from April 2023 and is well positioned to lead our team and industry to keep up this pace of change that we saw in 2022.

Finally, I would like to thank the Board for their ongoing leadership and continued commitment to enhancing all facets the OOH sector. I invite you to review our achievements in this report and share in our industry success.

Charles Parry-Okeden
Independent Chairman

¹SMI data 2022



\$1B

The OOH sector achieved \$1B revenue in 2022

NIF

MOVE 1.5 was launched with the Neuro Impact Factor, helping to measure the impact of campaigns

CEO'S MESSAGE

While the pandemic may seem like a distance memory, we are still feeling its reverberations as our world slowly returns to a new equilibrium.

For the Outdoor industry the plans we put into action at the height of 2020, are now being realised. Our members and board came together steadfastly with our buyers, supercharged by our partnership with the Outdoor Futures Council. What we have built together is more fit for purpose metrics, making it easier to buy and measure our campaigns.

This commitment to and delivery of new metrics didn't go unnoticed by the market. In our own inner circle, we increased our membership by 25 per cent, bringing us close to representing 100 per cent of Outdoor media publishers. Buyers came back which saw us regain revenue to what it was pre-pandemic and exceed 2019 revenue year on year by 4.1 per cent in the last quarter of 2022.

All of this saw us reach the milestone of \$1B, a target we had our eyes on for many years.

HAVING AN IMPACT

Our plans started with the cornerstone of any good communication strategy, we listened to what the market wanted and then delivered it. This was both simple and complex.

Complex because we had to overhaul our audience measurement system MOVE in the short term, while not taking our eye off the ball of developing the state-of-the-art upgrade, MOVE 2.0, to be launched in 2024.

We launched MOVE 1.5 our interim measurement system on 31 January. This gave buyers reach and frequency for all campaigns, including digital, as well as introducing a new qualitative metric, and a world first, the Neuro Impact Factor (NIF).

The NIF is based on evidence from the largest media neuroscience study of its kind, which is a specialised approach that quantifies the subconscious impact of a media environment as people naturally experience it. The NIF adds an extra dimension to MOVE 1.5's reach and frequency scores, reporting the impact of campaigns run on classic and digital signs. This, coupled with our new Industry Standards launched concurrently, provides planners and

buyers greater clarity and defines agreed criteria for terminology, geography, screen ratios, insertion orders, and transacting using the currency by Share of Time — making it easier to meet campaign objectives.

PART OF THE COMMUNITY

We continue to demonstrate our commitment to the community by supporting and partnering with Government, charities, and a variety of causes in 2022. In total, our members donated \$126M in advertising space and services to place positive messages in the public space.

As part of our National Health and Wellbeing Policy, the OMA developed and launched the '*Better than you remember*' campaign, using our signs to promote healthier eating habits in partnership with Health and Wellbeing Queensland and Nutrition Australia. We donated \$8M towards this campaign, which reached over 10M Australians in our capital cities.


Our partnership with the Australian Federal Police through National Missing Persons Week, also continued for the 14th year; and with the Returned & Services League (RSL) we supported ANZAC Day for the third year, and the digital sign take over for Remembrance Day for the second.

A RISING TIDE LIFTS ALL BOATS

As I leave the industry after 13 years as CEO, I look back on so much significant change. The most heartening is that the industry is more collaborative and truly more community-minded than ever before. We started on this journey in 2010 with the launch of MOVE, the one-stop shop for audience measurement. This exploration of new ways of thinking and doing was tough, but everyone got onboard for the sake of growing the industry. That same collective motivation is what continues to propel us forward.

I leave the OMA in firm standing, as a truly innovative industry that listens to the market and its customers, to innovate and develop based on their needs. This has taken OOH from being number six on the media planning list in 2010, to being the third most bought channel today.

I am truly grateful for an incredible career in OOH. A HUGE thank you to the team and to all the wonderful people of the OOH industry who have coloured the weeks and years. It's been a wild rollercoaster ride but it's now time for me to hop off and cheer from the sidelines as the industry continues on the journey to deliver its new granular nation-wide

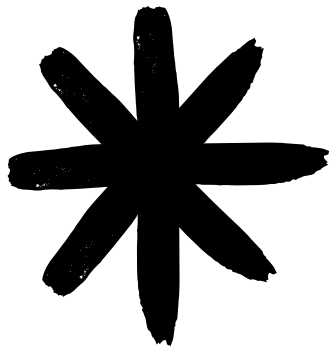


audience measurement system MOVE 2.0 in 2024. I know it will be a game changer both here in Australia and overseas.

I also look forward to watching OOH garner a larger slice of the media pie. I know under the tutelage of the new CEO Elizabeth McIntyre and our independent Chairman Charles Parry-Okeden that the industry will continue to grow by breaking the mould, providing evidence led proof that challenges our competitors and delivers on our promise to be big, bold and audacious.

God speed.

Charmaine Moldrich
CEO, OMA & MOVE



OMA & MOVE BOARDS



Charles Parry-Okeden
Independent Chair
 OMA & MOVE

Charles has over 30 years of media experience in predominantly Out of Home advertising. He is co-founder and Global CEO of Executive Channel Holdings Pty Limited whose brands include ECN, Media i, Media i France, and Mi-3. Charles was appointed to the position of Independent Chairman of the OMA and MOVE in 2019 and is also a Board Director for the World Out of Home Organisation.

CHARLES PARRY-OKEDEN



Brad Bishopp
CEO & Managing Director
 Bishopp Outdoor Advertising

Brad is the Managing Director and CEO of Bishopp Outdoor Advertising. An advocate for small independent family-owned Outdoor companies and industry professionals, along with sustainable development and growth of the Outdoor industry. Brad recognises Out of Home advertising as a key contributor to local and national business growth. Brad has been a member in the OMA since 1995 and a Director of the OMA Board from 2006 to 2017; He re-joined in 2020.

BRAD BISHOPP



Paul Butler
Managing Director
 Val Morgan Outdoor (VMO)

Paul has over 25 years of senior leadership experience, and a proven track record in growing future-focused businesses. As the Managing Director of VMO, Paul is pivotal in propelling growth and dedicated to creating the future leaders of the OOH industry. Paul was co-opted to the OMA Board of Directors as a non-voting member in 2022.

PAUL BUTLER



Robbie Dery
Chief Commercial Operating Officer
 oOh!media

Robbie's 25-year career spans aviation, financial services and media sectors across the UK, European and North American markets. In his role as Chief Commercial Operating Officer, Robbie has led the commercial agenda for airports and billboards, Qantas Lounges and inflight entertainment, rail and street furniture businesses, and is also responsible for oOh!media's Product Strategy division. Robbie has been recognised with many Moodie Davitt awards for his innovative approach to developing unique and engaging Out of Home media platforms. Robbie joined the MOVE Board in 2020.

ROBBIE DERY



Kirsty Dollisson
Managing Director
 TorchMedia

Kirsty has 25 years of Out of Home experience across Boyer Group, EyeCorp and TorchMedia. She launched the TorchMedia brand for the Claude Group in 2007 and has since been the driving force behind developing the company's dedicated transit media offering in Australia. Kirsty is the Chair of the OMA Sales and Marketing Committee and has been a Director of the OMA since 2017.

KIRSTY DOLLISSON



Noel Cook
 Director, OMA Board

Until May 2022



Max Eburne

Chief Commercial Officer
JCDecaux

Max has over 23 years of experience in the media sales industry, 15 of which have been with JCDecaux. As Chief Commercial Officer, Max oversees the strategic management and growth of the business's advertising sales and ensures advertising and marketing strategies for the advertising assets are optimally matched to clients to achieve sales objectives. Max joined the MOVE Board in 2019.

**MAX
EBURNE**



Andrew Hines

Chief Operating Officer
JCDecaux

Andrew has more than 25 years of experience in the Out of Home industry and is the Chief Operating Officer of JCDecaux. Andrew's career began at Cody Outdoor and he was later the Chief Financial Officer of APN Outdoor. He became Chief Operating Officer of APN Outdoor in 2006 before it was acquired by JCDecaux in 2018. Andrew joined the OMA Board in 2019.

**ANDREW
HINES**



Cathy O'Connor

Chief Executive Officer
oOh!media

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

**CATHY
O'CONNOR**



Steve O'Connor

Chief Executive Officer
JCDecaux

Steve has over 30 years of experience in the Out of Home industry having started as Sales Manager with Buspak in 1990, promoted to Sales Director in 1993 and then appointed CEO of Buspak Hong Kong three years later. Steve returned to Australia in 1998 to become CEO, growing the organisation and establishing himself as a dynamic and leading force in the Out of Home industry. In 2004 Steve joined JCDecaux Australia as CEO and he has been a Director of the OMA and MOVE since 2004.

**STEVE
O'CONNOR**



John O'Neill

Chief Executive Officer
QMS

John has over 25 years of experience in the Out of Home industry developing and leading high-performance sales teams at QMS, EyeCorp, Media Puzzle and oOh!media. As CEO of QMS, John is instrumental to its continued strong growth and performance as leaders in high impact digital Outdoor. John has been a Director of the OMA and MOVE since 2018.

**JOHN
O'NEILL**



Chris Tyquin

Joint Managing Director
goa

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

**CHRIS
TYQUIN**

OMA & MOVE TEAMS

We asked our OMA and MOVE teams what motivates them about working in OOH?

OMA & MOVE are a talented and passionate team led by the mantra ‘Spirited and smart with humour and heart.’

Spirited

We are in the ideas business which means taking risks and being confident to follow through on our decisions. Openness is how we operate, we always tell it to you straight with honesty, passion and respect. Change is a given, so we are tenacious and never give up.

Smart

We are clever, sharp and resourceful, and use that to keep the industry flourishing. For us, being smart means taking the time to plan, being relentlessly curious and asking the right questions to uncover new things.

Humour

It takes less muscles to smile than to frown. We keep it light, breezy and jaunty; it helps with breaking down barriers. Fun never hurt anyone.

Heart

Treat everyone as you would want to be treated is our motto. It feels good to belong to a great team, and great teams get great results. Success breeds success.



Sophie Parry Okeden
Administration Assistant

Until February 2023

Alexandra Harding Simpson
Communications Specialist,

Government Relations, OMA

Until June 2022

Kirsten Samuels
Senior Policy Advisor, OMA

Until April 2022

Emma Ward
Communications Manager, OMA & MOVE

Until March 2022



Charmaine Moldrich
Chief Executive Officer
OMA & MOVE

Charmaine has over 40 years of experience in leadership, management, marketing, communications, and business development. Charmaine departed in April 2023 after 13 years in the role.

CHARMAINE MOLDRICH



Kylie Green
General Manager
OMA & MOVE

The unification of the industry and trajectory of growth. There is a lot of optimism around the channel and the significant investment of MOVE 2.0, which makes it an exciting time to be in OOH.

KYLIE GREEN



Grant Guesdon
Lead Generation
MOVE 2.0 Lead

Even after 13 years in the industry, I still get excited about the data and what it says about the OOH story. It's the most relevant and innovative advertising channel in Australia.

GRANT GUESDON



Julie Jensen
Marketing Director
OMA & MOVE

Change, constant change. And working with a smart, dedicated Board and membership means we can do outstanding work that has been recognised globally.

JULIE JENSEN



Charlotte Libera

Communications Specialist
OMA

Charlotte left the organisation in March 2023, after one year in the role.

CHARLOTTE LIBERA



Tallulah Mills-Hicks

Marketing Assistant
OMA & MOVE

I am impressed by the level of creativity in the campaigns our members' display and how emerging technologies are only making them better! It is inspiring to be a part of such a creative and innovative industry.

TALLULAH MILLS-HICKS



Ganjina Nozakova

Systems & Training Manager
MOVE

OOH harnesses a wealth of brilliant minds fervently dedicated to innovation and creativity. This, together with its power to drive growth by broadcasting impactful messages are the key attributes of the industry that I value the most.

GANJINA NOZAKOVA



Jessica Parry Okeden
Member & Team Coordinator
OMA & MOVE

I love how our work in the OOH industry is seen by people every day, whether they are aware of it or not. It is a very powerful tool that keeps continuing to amaze me in the results it can deliver.

JESSICA PARRY OKEDEN



Jemima Southgate

Executive Assistant to CEO
OMA & MOVE

Working at the OMA provides me with a window into the best OOH has to offer: the passionate talent across our membership, our driven Board and the creativity afforded by the medium. I love my job.

JEMIMA SOUTHGATE



Jose Valderrama

Audience Data & Software Manager
MOVE

I love the power that OOH has in our day-to-day lives and I am proud of being part of it. It is always a pleasure to work with smart and creative people and to be constantly challenged to be my best.

JOSE VALDERRAMA



NEW HOUSE RIVERVIEW HOUSE

CATS VS GIANTS
0 DAYS
22 HRS
43 MINS
VICTORIA
TICKETS.AFL

FESTIVAL OF FOOTY
3DOOH
TOYOTA
TOYOTA
TOYOTA

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Charles Beattie
0437 948 079

Elizabeth St Flinders St
ROCKET HAND FORGED BURGERS & FRIES
Walker's DOUGHNUTS COFFEE
Walker's DOUGHNUTS COFFEE
Walker's DOUGHNUTS COFFEE
DOUGHNUTS
shazinko
FLY WHEEL

Winner, Innovation in Out of Home, Q1
AFL, Festival of Footy 3DOOH



INNOVATE

2024

MOVE 2.0 will launch in 2024

82%

OOH remains the sole media channel that can reach 82 per cent of Australians daily

PICTURED RIGHT

Winner, Out of Home for Good, Q1
Sydney Gay & Lesbian Mardi Gras, Transdev
Sydney, ALTRAC & Transdev Sydney Ferries
*United we Shine: Ride with Pride
to the Rainbow Road*

—
Honourable Mention, Big Bold & Bright, Q4
Mecca, *Gift the Love of Beauty at Mecca*

PICTURED BELOW

Winner, Out of Home for Good, Q4
RSL Queensland, *Remember to Remember,
Remembrance Day*



Out of Home (OOH) advertising is a traditional media channel that stands out as one of the few that continues to grow and service cities and their residents.

Despite digital disruption affecting other traditional media channels and leading to a decline in audience and market share, OOH remains the sole media channel that can reach 82 per cent of Australians every day.

By disseminating information and ideas beyond individuals' personal online curation, OOH advertising serves as a crucial means of connection.

MOVE 1.5

The OMA's audience measurement system, MOVE, underwent an upgrade in 2022, to significantly enhance the way agencies and businesses can plan and evaluate their OOH campaigns.

The upgraded MOVE 1.5 now provides detailed reports on reach and frequency for classic and digital signs, based on impressions calculated from factors such as audience dwell, sign dwell, and Share of Time. These inputs have been seamlessly integrated into the existing system; an interim tool until the industry transitions to the new measurement platform, MOVE 2.0, in 2024.

A world first, MOVE 1.5 incorporates the qualitative metric launched in 2021, the Neuro Impact Factor (NIF). This added metric offers agencies and advertisers a qualitative factor to aid them in campaign planning, purchasing, and reporting, by providing an impact score for all campaigns.



“What we have done goes beyond making Outdoor easier to transact and measure. We are setting ourselves up for future growth through programmatic and automation.”

—
GRANT GUESDON
MOVE 2.0 Lead, MOVE



THE NEURO IMPACT FACTOR (NIF)

The world-first research study conducted by international research company Neuro-Insight, used eye-tracking and brain-imaging technology to analyse the brain's neural response when looking at advertising on OOH signs. More than 2,000 people participated in the study and their responses to over 800 classic and digital signs were recorded. By measuring the peak moments of long-term memory encoding and emotional intensity in the brain, Neuro-Insight was able to evaluate the impact of OOH signs on the audience. Both memory and emotion are key neuroscience metrics associated with mental availability which is linked to effective advertising campaigns.

The findings show that advertising seen on classic signs is in the range of impact of a 30 second radio ad or 15 second television ad. Advertising seen on digital signs averages even higher by delivering 63 per cent more impact than classic signs. Crucially the results provide proof that advertising seen on OOH signs has the power to deliver impact in just a one or two second glance.

The NIF extends OOH measurement beyond attention, enabling advertisers and agencies to select OOH formats that provide optimal audience reach, engagement and impact.

**ADVERTISING SEEN ON CLASSIC
SIGNS IS IN THE RANGE OF IMPACT
OF A 30 SECOND RADIO AD.**



STANDARDISATION

Along with the introduction of NIF and MOVE 1.5, the industry has also brought into play Industry Standards. These standards are aimed at simplifying the process of buying and selling OOH advertising, while also providing planners and buyers with more transparent guidelines. The criteria includes terminology, geography, screen ratios, insertion orders, and Share of Time, which allows a more efficient way of transacting digital signs. The standardisation of these practices brings greater clarity and ease of buying.



“Standardisation is saving us time so we can spend less time transacting and we can spend more time on audiences, planning, more about people, not screens, and actually really bring to life some amazing campaigns on OOH.”

NICK THOMAS

National Head of Investment and OFC Standardisation
sub-committee Co-Chair, MediaCom



INNOVATE

SHARE OF TIME

Share of Time (SOT), refers to the portion of display time that advertisers receive during an agreed buying period on digital OOH signs. This new way of buying takes into account not only the advertiser's own content, but also other types of content such as programmatic ads, industry promotions, and editorial content. Ultimately, the SOT represents the percentage of overall display time that an advertiser has purchased for their content to be shown.



**SOT MAKES IT EASIER
TO BUY BY LOCATION AND
BY ENVIRONMENT, IN
TURN HELPING ADVERTISERS
MEET THEIR DESIRED
CAMPAIGN OBJECTIVES.**

PICTURED BELOW
JOLT Charge, Hello

—
Revlon, Face & Lip - Colorstay 24H Longwear
Makeup & Colourstay Matte Lite Crayon



VERIFICATION

The OMA and its members collaborated closely with agencies, clients, and verification service providers to establish the appropriate standards for assessing, delivering, and validating the execution of digital campaigns.

A sub-committee was tasked with developing these standards and worked closely with the Media Federation of Australia's Outdoor Futures Council verification sub-group.

So far, we have conducted verification tests, developed a standard insertion order, agreed on verification guidelines and the OMA verification sub-committee has been meeting on a weekly basis since June 2021.

SUSTAINABILITY

The OMA is dedicated to setting a path for the industry to reduce emissions. The OMA Net Zero Committee is working toward the following goals:

- 01 Develop a carbon calculator which will enable OMA members to offer carbon neutral advertising.
- 02 Provide a guide for OMA members to start their individual company's carbon neutral certifications.
- 03 Provide recommendations to OMA members for reducing emissions.
- 04 Researching technologies that could bring the industry to Net Zero.
- 05 Calculate and offset the OMA operations to be carbon neutral and reduce emissions ongoing.





THE
**GRAY
MAN**

ONLY ON
METELIX





Winner, Grand Prix 2022
Winner, Best Use of Multi-Format, Q1
Subway, *Beyond Big*



CELEBRATE

CREATIVITY



PICTURED ABOVE
Dare Iced Coffee, *When Your Bottle is a Temple*

—
Mutti, *When You Know You Know*

The OMA launched its updated Creative Guidelines, outlining best practice for stand out Out of Home (OOH) creative that delivers results. With such a large window of opportunity to connect with people, creative and innovative design is key to campaign success.

OOH is constantly evolving as a medium and this invites creatives to push the boundaries to capture the attention of audiences. From interactive Digital OOH and 3D billboards to traditional printed signs, creative execution is the interface between audience, location and format.

Through its Creative Collection competition, the OMA celebrates creative ingenuity. Established in 2013, the quarterly competition recognises the most inventive and creative OOH campaigns across five categories. At the end of each year, one campaign is honoured with the coveted Grand Prix award.



THE CREATIVE COLLECTION CATEGORIES ARE:

- 1** **BIG, BOLD AND BRIGHT**
- 2** **BEST USE OF MULTI-3 FORMAT**
- 3** **BEST USE OF DIGITAL**
- 4** **INNOVATION IN OUT OF HOME**
- 5** **OUT OF HOME FOR GOOD**



125 ENTRIES IN THE CREATIVE COLLECTION COMPETITION, SHOWCASING THE CREATIVITY AND INNOVATION IN THE OOH LANDSCAPE.

A huge thank you to the judges, who lent their expertise and time to reviewing the entries:

Mark Buckley, General Manager, Civic Outdoor

Matt Bushby, Managing Director ANZ/SEA, Hivestack

Sev Celik, Commercial Director, Tonic Media Network

Oliver Devaris, Co-founder & Creative Director, Ext77

Gordon D'Mello, Product & Marketing Manager, Motio

George Exikanas, Executive Manager, Marketing, IAG

Aldo Ferretto, Creative Director, The Hallway

Peter Galmes, Creative Director, POLY Creative

Jo Lawson, Corporate Partnerships Manager, Australian Red Cross Lifeblood

Charmaine Moldrich, Chief Executive Officer, OMA & MOVE

Edwina Moller, Brand Manager - Bonds, Hanes Brands

Damian Nielsen, General Manager, CV Media & Signage

Caroline Nikolic, Senior Group Brand & Marketing Manager, Scentre Group Brandspace

Nina Nyman, Chief Marketing Officer, UnLtd

Angelo Poli, Head of Sales, The Media Shop

Kirsty Visman, Managing Director, Superdream

David Widdop, Managing Director, Blue Tongue Outdoor

The Grand Prix guest judges included:

Gordon D'Mello, Product & Marketing Manager, Motio

Peter Galmes, Creative Director, POLY Creative

Charmaine Moldrich, Chief Executive Officer, OMA & MOVE

Angelo Poli, Head of Sales, The Media Shop

Kirsty Visman, Managing Director, Superdream



“From a media owner perspective, it is wonderful to see the high calibre of creative. We talk a lot about technology and innovation and its absolutely true that the OOH space has never been so dynamic.”

—
MARK BUCKLEY
General Manager, Civic Outdoor



Q1

QUARTER ONE

Big, Bold & Bright

Village Roadshow Group, *Moonfall*

—

Best Use of Multi-Format

Subway, *Beyond Big*

—

Best Use of Digital

Chatime, *Satisfy your Strange*

—

Innovation in Out of Home

AFL, *Festival of Footy 3DOOH*

Honourable Mention

Mastercard, *All Love - Australian Open*

—

Out of Home for Good

Sydney Gay & Lesbian Mardi Gras, Transdev Sydney, ALTRAC & Transdev Sydney Ferries *United we Shine: Ride with Pride to the Rainbow Road*

Honourable Mention

Health and Wellbeing Queensland and Nutrition Australia, in partnership with the Outdoor Media Association, *Better than you remember*

Q2

QUARTER TWO

Big, Bold & Bright

Amazon Prime Video, *The Boys Season 3*

Honourable Mention

Royal Australian Mint, *Mint to Be*

—

Best Use of Multi-Format

L'Oreal - YSL, *YSL Beauty Zones*

—

Best Use of Digital

Kayo Sports, *F1 Melbourne*

&

Tourism New Zealand, *Secret Travel Agent*

—

Innovation in Out of Home

Paramount Pictures, *Top Gun 3D*

—

Out of Home for Good Grand Prix Winner Q2, 2022

NAIDOC, Transdev Sydney, ALTRAC, Transport Canberra & Canberra Metro, *NAIDOC Week 2022: Get Up! Stand Up! Show Up!*

Honourable Mention

NSW Department of Customer Service, *Covid Winter Campaign*

Q3

QUARTER THREE

Big, Bold & Bright

Specsavers, *Should've Gone to Specsavers*

Honourable Mention

Bankwest, *Born this WA*

—

Best Use of Multi-Format

Amazon Prime Video, *Lord of the Rings - Rings of Power*

Honourable Mention

Reddit, *Find Your People*

—

Best Use of Digital

Guardian Australia, *Guardian Australia Live Headlines*

—

Innovation in Out of Home

BINGE, *House of the Dragon*

Honourable Mention

Optus, *Optus Home Internet & ATN*

—

Out of Home for Good

Australian Federal Police in partnership with the Outdoor Media Association, *Without Them - National Missing Persons Week*

Honourable Mention

Lifeline Australia, *Out of the Shadows*

Q4

QUARTER FOUR

Big, Bold & Bright

Providoor, *We Worship Food*

Honourable Mention

Mecca, *Gift the Love of Beauty at Mecca*

—

Best Use of Multi-Format

SBS, *World Cup 2022*

—

Best Use of Digital

South Australian Tourism Commission, *For those who want a little more*

Honourable Mention

BMW, *X-Range*

—

Innovation in Out of Home

Jacob's Creek, *Lively Bunch*

—

Out of Home for Good

RSL Queensland, *Remember to Remember, Remembrance Day*

OMA INDUSTRY AWARDS

A thriving Outdoor industry is built by the individuals who consistently strive to take it to new heights. The OMA's Industry Awards recognise and celebrate these OMA members and their accomplishments.

This year, the Awards were extended to include state awards to represent talent nationwide.

The Awards ceremony was held in May and the following people were acknowledged for their achievements. Thank you for your continuing dedication to the industry:



Emerging Leader Award sponsored by Big Screen Video

Alex Anthony, Val Morgan Outdoor

Excellence in Innovation Award

Nigel Spicer, Cactus Imaging, oOh!media

Outstanding Service Award

SA: Russell Bilsborow, JCDecaux
NSW: Cassandra Cameron, JCDecaux
QLD: Joint Winners: Nick McAlpine, Bishopp Outdoor Advertising and Elise Taylor, oOh!media
WA: Mark Treasure, oOh!media
VIC: Christian Zavec, QMS

Rising Star Award

QLD: Octavia Bellekens, Val Morgan Outdoor
VIC: Tess Fellows, oOh!media
SA: Natasha Jarrett, oOh!media
NSW: Joint Winners: Alec Mowat, Val Morgan Outdoor and Meaghan Spencer, oOh!media
WA: Anna Wyatt-Spratt, oOh!media

Ben Walker National Rising Star Award

Meaghan Spencer, oOh!media

OMA Industry Award

Karissa Fletcher, Shopper

Hall of Fame

Daphne McPhee (Posthumous)
Brian Tyquin, Outdoor Systems
Kelvin Whitford

MEDIA i AWARDS

The annual Media i Awards recognise excellence in sales teams and individuals across all media channels, with the winners voted on by media agencies. The OOH industry is proud of our sales professionals who use their experience to understand the customer journey and deliver on their expectations. OMA members this year continued to display distinction in media sales and were deservedly recognised at this year's Media i Awards.

Sales Representative of the Year (Outdoor/Cinema)

VIC: Michaela Colahan, oOh!media
WA: Alycia Diggle, JCDecaux
QLD Joint Winners: Matt Dilger, JCDecaux and Courtney Johnson, QMS
SA: Natasha Jarrett, oOh!media
NSW: Abby Stjernqvist, JCDecaux

Sales Teams Winners List

WA: JCDecaux
SA: oOh!media
VIC: oOh!media

**COPY AND CREATIVE COMPRISES
41 PER CENT OF WHAT MAKES
A SUCCESSFUL OOH CAMPAIGN.***

*Analytic Partners Meta Analysis, New Zealand, 2015 to 2021

2022 OMA Industry Award Judges:

Steve Bovey, 2018 Excellence in Innovation Award Winner; Paul Butler, Managing Director, Val Morgan Outdoor; Joe Copley, Chief Revenue Officer, Seedooh; Cathy O'Connor, CEO of oOh!media; Charles Parry-Okeden, Independent Chair of the OMA and MOVE; and special guest judge Lisa Walker, who judged the Ben Walker National Rising Star Award.

Last year over
53,000 reports
of a missing
person were
made in
Australia.

**WITHOUT
THEM
.COM
.AU**

MISSING
PERSONS.GOV.AU



COMMUNITY



“Operating 24/7 in the public domain and reaching 82 per cent of the Australian population living in and around capital cities every day, we know that our signs have the power to influence behavioural change.”

JULIE JENSEN
Marketing Director, OMA

OUT OF HOME (OOH) ADVERTISING IS ONE OF THE MOST TRUSTED CHANNELS USED FOR BROADCASTING GOVERNMENT AND COMMUNITY AWARENESS MESSAGING.

USING THE POWER OF OUT OF HOME FOR GOOD

The Outdoor industry plays a significant role in supporting the arts, sports, charitable organisations and government initiatives, by providing them with access to audiences.

OOH advertising is one of the most trusted channels used for broadcasting government and community awareness messaging. This year, OMA members have generously donated advertising space valued at more than \$126M to over 218 organisations.

Moreover, the OOH channel delivers additional benefits, with 50 per cent of its revenue returned to the government through taxation and rent paid to other landlords, including superannuation holdings.

PROMOTING HEALTH AND WELLBEING

The OOH industry has united to take an active role in limiting children's exposure to occasional food and drink products and in influencing healthier lifestyle choices through educational campaigns.

In 2020, the OMA introduced a ground-breaking National Health and Wellbeing Policy (NHWP). This policy prohibits the display of advertisements for occasional food and drink products within a 150-metre sightline of Australian primary and secondary schools.

Furthermore, the Outdoor industry pledged to create and implement an annual health and wellbeing campaign to encourage healthy choices. This initiative provides OOH advertising space valued at \$3M generously donated by OMA members. It has been successfully executed Australia-wide for the past two years.

PICTURED RIGHT

Honourable Mention, Out of Home for Good, Q1 Health & Wellbeing Queensland & Nutrition Australia, in partnership with the Outdoor Media Association, *Better than you remember*

“We’re committed to addressing health issues and promoting the importance of veggies in everyone’s diet, which is why it’s so rewarding to be working with the Outdoor industry to achieve this goal.”

DR ROBYN LITTLEWOOD
Chief Executive, Health and Wellbeing Queensland

BETTER THAN YOU REMEMBER

In collaboration with Health and Wellbeing Queensland and Nutrition Australia, the OMA partnered to launch a national health and lifestyle campaign called *Better than you remember*. The campaign encouraged Australians to increase vegetable consumption by showing delicious veggie dishes and providing recipes via the Health and Wellbeing Queensland website boostyourhealthy.com.au. Running from 30 January to 26 February on OMA member signs, the campaign reached 10.4M people across the country and was valued at \$8M.

10.4M

Campaign reach over 4 weeks

\$8M

In advertising space donated





PICTURED ABOVE
 Winner, Out of Home for Good, Q3
 Australian Federal Police in partnership with the
 Outdoor Media Association, *Without Them - National
 Missing Persons Week*

—
 Q2 Grand Prix Winner 2022
 Winner, Out of Home for Good, Q2
 NAIDOC, Transdev Sydney, ALTRAC, Transport Canberra
 & Canberra Metro *NAIDOC Week 2022:*
Get Up! Stand Up! Show Up!



PICTURED RIGHT
 RSL Queensland, *Light up the Dawn*

COMMUNITY

BETTER THAN YOU REMEMBER (CONT.)

The OMA conducted post-campaign research that surveyed 1,217 Australians, half of whom were parents. According to the findings, the message *Better than you remember* had a strong impact on parents, with 40 per cent of respondents indicating that they were inspired to add more vegetables to their own and their children's meals. The campaign also encouraged 1 out of 3 individuals to visit the dedicated *Boost your healthy* website.

Post campaign study

27%

of people remembered the campaign creative on Out of Home signs.

40%

of parents were encouraged to add vegetables to their own and their children's meals.

31%

of parents were encouraged to visit the campaign website.

13%

of people talked to family and friends about the campaign.

NATIONAL MISSING PERSONS WEEK CAMPAIGN

National Missing Persons Week (NMPW) ran from 31 July to 6 August.

The partnership between the Outdoor Media Association (OMA), the Australian Federal Police (AFP), and the National Missing Persons Coordination Centre has been ongoing for 14 years in NSW and eight years nationally, making it the longest community partnership for the Outdoor industry. In 2022, OMA members donated advertising space valued at approximately \$2.5M for the NMPW campaign. Over the last decade, the total donation of media space to NMPW has been almost \$15M.

The NMPW 2022 campaign aimed to raise awareness for those who hope, hold on, guess, ask, and pray for the safe return of their missing loved ones. The campaign was multi-format across roadside billboards, bus externals, train stations, shopping centres, street furniture, and retail environments featuring images and website *withouthem.com.au*. The campaign reached an estimated 10M Australians.

ANZAC DAY

OMA members partnered with Return Services League (RSL) QLD for the third year to run a nationwide campaign to encourage Australians to participate in the *Light Up the Dawn* campaign on ANZAC Day. The campaign ran from 18 to 25 April and was valued at \$3.3M.

The *Light Up the Dawn* campaign was initially launched by RSL QLD in 2020, as traditional commemorations were cancelled due to the pandemic. It continued in 2021, offering Australians different ways to commemorate and honour service men and women on ANZAC Day.

The 2022 initiative focused on the ANZAC spirit, which embodies Australian characteristics such as endurance, courage, mateship, humour, and ingenuity. This was a central component of the campaign, commemorating the ANZACs' landing in Gallipoli on 25 April 1915.



“It’s just one minute, but it means so much more to the veteran community and their families.”

MAJOR GENERAL STEPHEN DAY DSC AM
State President, RSL QLD



REMEMBRANCE DAY CAMPAIGN

For the second year, the OMA and its members supported RSL QLD's *Remembrance Day* campaign, reminding people to observe a minute of silence at 11am on 11 November to remember those who have served and sacrificed in all wars and conflicts. The OMA and its members have been proud supporters of the RSL's national commemoration campaigns for three years, donating more than \$14M in advertising space for ANZAC Day and Remembrance Day.



B
QVB
York St
Stand C
8078, 8079, 8080, 8081, 8082, 8083, 8084, 8085, 8086, 8087, 8088, 8089, 8090, 8091, 8092, 8093, 8094, 8095, 8096, 8097, 8098, 8099, 8100, 8101, 8102, 8103, 8104, 8105, 8106, 8107, 8108, 8109, 8110, 8111, 8112, 8113, 8114, 8115, 8116, 8117, 8118, 8119, 8120, 8121, 8122, 8123, 8124, 8125, 8126, 8127, 8128, 8129, 8130, 8131, 8132, 8133, 8134, 8135, 8136, 8137, 8138, 8139, 8140, 8141, 8142, 8143, 8144, 8145, 8146, 8147, 8148, 8149, 8150, 8151, 8152, 8153, 8154, 8155, 8156, 8157, 8158, 8159, 8160, 8161, 8162, 8163, 8164, 8165, 8166, 8167, 8168, 8169, 8170, 8171, 8172, 8173, 8174, 8175, 8176, 8177, 8178, 8179, 8180, 8181, 8182, 8183, 8184, 8185, 8186, 8187, 8188, 8189, 8190, 8191, 8192, 8193, 8194, 8195, 8196, 8197, 8198, 8199, 8200, 8201, 8202, 8203, 8204, 8205, 8206, 8207, 8208, 8209, 8210, 8211, 8212, 8213, 8214, 8215, 8216, 8217, 8218, 8219, 8220, 8221, 8222, 8223, 8224, 8225, 8226, 8227, 8228, 8229, 8230, 8231, 8232, 8233, 8234, 8235, 8236, 8237, 8238, 8239, 8240, 8241, 8242, 8243, 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8742, 8743, 8744, 8745, 8746, 8747, 8748, 8749, 8750, 8751, 8752, 8753, 8754, 8755, 8756, 8757, 8758, 8759, 8760, 8761, 8762, 8763, 8764, 8765, 8766, 8767, 8768, 8769, 8770, 8771, 8772, 8773, 8774, 8775, 8776, 8777, 8778, 8779, 8780, 8781, 8782, 8783, 8784, 8785, 8786, 8787, 8788, 8789, 8790, 8791, 8792, 8793, 8794, 8795, 8796, 8797, 8798, 8799, 8800, 8801, 8802, 8803, 8804, 8805, 8806, 8807, 8808, 8809, 8810, 8811, 8812, 8813, 8814, 8815, 8816, 8817, 8818, 8819, 8820, 8821, 8822, 8823, 8824, 8825, 8826, 8827, 8828, 8829, 8830, 8831, 8832, 8833, 8834, 8835, 8836, 8837, 8838, 8839, 8840, 8841, 8842, 8843, 8844, 8845, 8846, 8847, 8848, 8849, 8850, 8851, 8852, 8853, 8854, 8855, 8856, 8857, 8858, 8859, 8860, 8861, 8862, 8863, 8864, 8865, 8866, 8867, 8868, 8869, 8870, 8871, 8872, 8873, 8874, 8875, 8876, 8877, 8878, 8879, 8880, 8881, 8882, 8883, 8884, 8885, 8886, 8887, 8888, 8889, 8890, 8891, 8892, 8893, 8894, 8895, 8896, 8897, 8898, 8899, 8900, 8901, 8902, 8903, 8904, 8905, 8906, 8907, 8908, 8909, 8910, 8911, 8912, 8913, 8914, 8915, 8916, 8917, 8918, 8919, 8920, 8921, 8922, 8923, 8924, 8925, 8926, 8927, 8928, 8929, 8930, 8931, 8932, 8933, 8934, 8935, 8936, 8937, 8938, 8939, 8940, 8941, 8942, 8943, 8944, 8945, 8946, 8947, 8948, 8949, 8950, 8951, 8952, 8953, 8954, 8955, 8956, 8957, 8958, 8959, 8960, 8961, 8962, 8963, 8964, 8965, 8966, 8967, 8968, 8969, 8970, 8971, 8972, 8973, 8974, 8975, 8976, 8977, 8978, 8979, 8980, 8981, 8982, 8983, 8984, 8985, 8986, 8987, 8988, 8989, 8990, 8991, 8992, 8993, 8994, 8995, 8996, 8997, 8998, 8999, 9000

Bus 91 202310

Service changes
Service changes

A digital advertisement for the BMW X2. The image shows a dark blue BMW X2 driving on a road. The BMW logo is in the top left corner, and the text 'X2' is prominently displayed in the center. The background is a bright blue sky with clouds.

A digital advertisement for the BMW X4. The image shows a silver BMW X4 driving on a road. The BMW logo is in the top left corner, and the text 'X4' is prominently displayed in the center. The background is a bright blue sky with clouds.

A digital advertisement for the BMW X6. The image shows a dark blue BMW X6 driving on a road. The BMW logo is in the top left corner, and the text 'X6' is prominently displayed in the center. The background is a bright blue sky with clouds.

Honourable Mention, Best Use of Digital, Q4
BMW, X-Range



UNITY

CODE OF ETHICS

Code of Ethics — a set of voluntary principles defining the industry's standards for working with advertisers and regulators.



76%

reduction in creative modifications required compared to 2021

PICTURED RIGHT
L'Oreal, *Come Together at Ralph's Club*
—
Warner Bros., *The Batman*

With 82 per cent of Australians leaving home each day, Out of Home (OOH) has a responsibility to establish and uphold a set of industry standards that sets the bar for social accountability. Communities have an expectation as to the quality and intent of the messages promoted in Outdoor public spaces.

To ensure that community and industry standards are met, the OMA Code of Ethics mandate that members comply with 17 self-regulatory codes, policies, and guidelines. This guarantees that the OMA and its members are accountable and ethical with advertisers, government and the community, to maintain best practices.



“It can be a challenge to translate a piece of art into an effective OOH campaign, but the NAIDOC campaign on the side of trams was a perfect canvas! It was beautiful, eye-catching, and helped the joy of the message shine through.”

KIRSTY VISMAN

Managing Director, Superdream and
Judge for Q2, Creative Collection competition



POLICIES AND CODES

The OMA collaborates with Ad Standards, the Australian Association of National Advertisers (AANA), The Communications Council, and the Alcohol Beverages Advertising Code (ABAC) to ensure that OOH advertising is in line with industry standards and community expectations. There are nine self-regulatory advertising codes and 8 OOH industry policies that OMA members comply with. Overall, there are 17 specific self-regulated codes and policies that govern OMA members and the larger advertising industry.

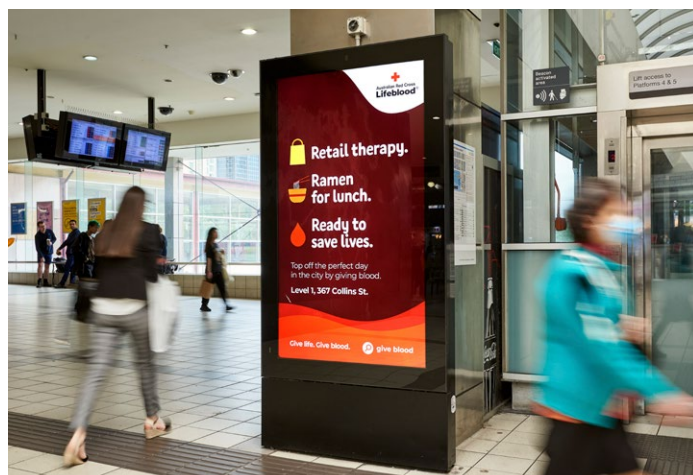


FRAMEWORK

INDUSTRY FRAMEWORK

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

- AANA Code for Advertising and Marketing Communications to Children
- AANA Code of Ethics
- AANA Environmental Claims in Advertising and Marketing Code
- AANA Food and Beverages Advertising and Marketing Communications Code
- AANA Wagering Advertising and Marketing Communication Code
- ABAC Responsible Alcohol Marketing Code
- OMA Advertising Content Policy
- OMA Alcohol Advertising Policy
- OMA Code of Ethics
- OMA Digital Signage Policy
- OMA Environment and Sustainability Policy
- OMA National Health and Wellbeing Policy
- OMA Placement Policy
- OMA Political Advertising Policy
- 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



In line with the need for adaptive self-regulatory schemes and policies, the OMA transitioned from the HSR system to the FSANZ in the National Health and Wellbeing Policy from July 2022. This move towards a standardised definition of occasional food within the wider advertising industry facilitates greater industry compliance and strengthens the regulatory framework for advertising of occasional food and drink products.

OMA

Membership stipulates strict adherence to the OMA Code of Ethics, which outlines industry standards for conducting business with advertisers and regulators while also establishing responsibilities towards the community and environment. The Code of Ethics serves as a supplement to existing self-regulatory codes and policies, as well as federal and state laws, augmenting the obligations already imposed on members.

COMPLAINTS AND BREACHES

Ad Standards oversees the self-regulatory system, which ensures compliance. In 2022, less than 1 per cent of complaints were received by Ad Standards regarding OOH advertisements. Two advertisements were found to be in breach.

To support members, the OMA runs a series of educational and advertising pre-vetting initiatives:

- 01** A national program of Content Training for members
- 02** A Copy Advice Service based as part of the OMA's Advertising Content Policy
- 03** A Concept Advisory Service for advertisers and creative agencies to use at the early stages of OOH advertising campaign development.

OOH CODE BREACHES HAVE REDUCED BY 75 PER CENT SINCE 2011.

PICTURED LEFT
Australian Red Cross Lifeblood,
A Perfect Day in the CBD

PICTURED RIGHT
Winner, Best Use of Digital, Q3
Guardian Australia, *Guardian Australia Live Headlines*

| YEAR | NUMBER OF COMPLAINTS UPHELD* | PERCENTAGE OF COMPLAINTS TO AD STANDARDS | AANA GUIDELINES CONTRAVENED |
|------|------------------------------|--|---|
| 2022 | 2 | Less than 1% | Targeting children, discrimination/vilification and sex, sexuality and nudity |
| 2021 | 0 | 2.01% | None |
| 2020 | 3 | 3.2% | Health and safety, environmental claims |
| 2019 | 1 | 10.2% | Violence |
| 2018 | 0 | 7% | None |
| 2017 | 4 | 8.3% | Sexual appeal, health and safety, discrimination |
| 2016 | 1 | 9.1% | Sex, sexuality and nudity |
| 2015 | 2 | 9.3% | Discrimination, health and safety |
| 2014 | 1 | 10.4% | Violence |
| 2013 | 1 | 16.8% | Sex, sexuality and nudity |
| 2012 | 3 | 9.6% | Violence, health and safety |
| 2011 | 8 | 39.1% | Sex, sexuality and nudity |

^Complaints made against OMA members only.
 *Source: Ad Standards (adstandards.com.au)



FRAMEWORK

COMPLAINTS BY MEDIA (%) 2022

| MEDIA | 2022 |
|-------------------------|--------|
| Billboard | 3.54% |
| Internet | 3.46% |
| Internet — social media | 13.69% |
| Outdoor | 1.23% |
| Poster | 3.31% |
| Print | 0.92% |
| Radio | 2.96% |
| TV — free to air | 57.05% |
| TV — on demand | 4.27% |
| TV — pay | 4.08% |



COPY AND CONCEPT ADVICE

Working together with advertisers and agencies, the OMA copy and concept advice service helps eliminate the likelihood of a breach.

In 2022, the OMA reviewed 210 advertisements submitted to the copy and concept advice service. Our continual education and consultation with members has resulted in a marked reduction in submissions being rejected or requiring modifications to achieve compliance.

- 25 were rejected. (62 per cent less than 2021)
- Seven were modified to comply with codes. (76 per cent less than 2021)

25

Rejected advertisements

7

Creatives were modified to comply with the codes

12,185

Schools mapped in MOVE

SCHOOL MAPPING TOOL

To fulfill its pledge to the community, the OMA launched the School Mapping Tool in 2018. This software assists OMA members in following the OMA's Placement Policy, which prohibits promoting products like alcohol, adult services, and occasional food within 150 metre sightline of a primary or secondary school. The School Mapping Tool in MOVE maps approximately 12,185 school campuses in NSW, QLD, SA, VIC, and WA.



12,185 SCHOOL LOCATIONS MAPPED IN MOVE HELPED MEMBERS ADHERE TO SELF-REGULATORY ADVERTISING POLICIES.

SUBMISSIONS TO GOVERNMENT

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

In 2022, the OMA prepared one submission:

Submission to the NSW Department of Planning and Environment: Chapter 3 Industry & Employment State Environment Planning Policy 2021 Review

PICTURED RIGHT
Venue Advantage,
Volvo Activation Support
—
Virgin Australia,
Now You're Flying

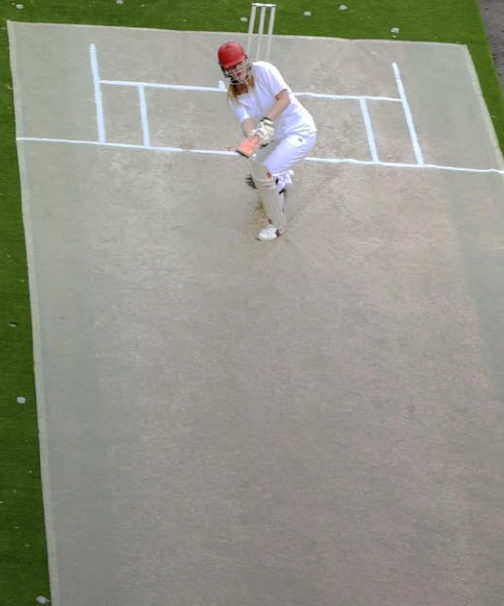


**NO
AD-BREAKS
DURING PLAY**

**GREAT CRICKET DESERVES
NO INTERRUPTIONS**



Kayo





PERFORM

REVENUE

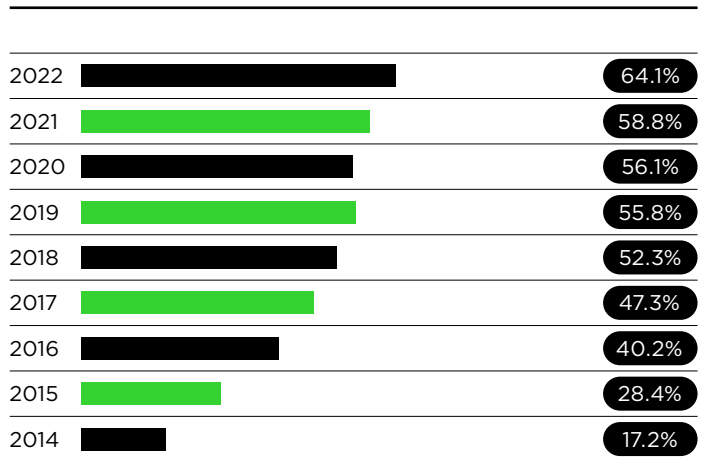


In 2022, the Out of Home (OOH) industry generated \$1.06B in revenue and Digital OOH accounted for 64.1 per cent.

OOH REVENUE RESULTS (\$M)*

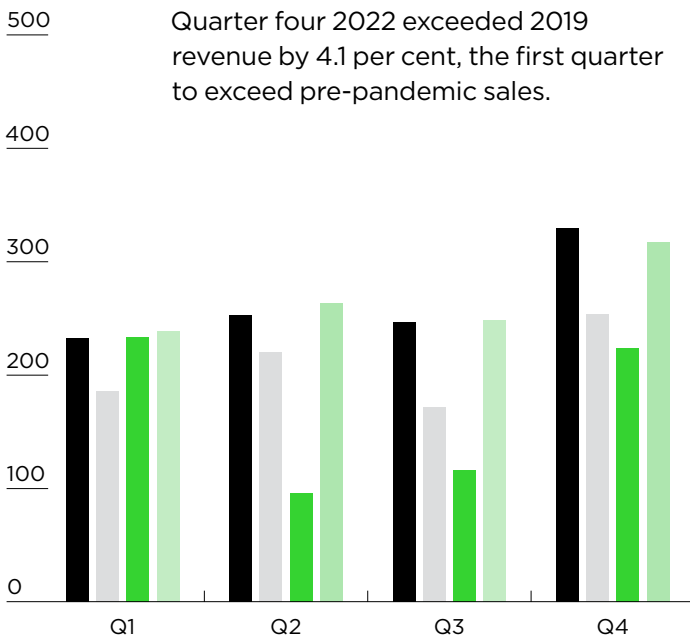
| YEAR | TOTAL OOH REVISED |
|------|-------------------|
| 2022 | 1,060.5 |
| 2021 | 831.1 |
| 2020 | 668.9 |
| 2019 | 1,066.4 |
| 2018 | 922 |
| 2017 | 837 |
| 2016 | 789 |
| 2015 | 682 |
| 2014 | 579 |

DOOH AS PERCENTAGE OF TOTAL OOH REVENUE (\$M)



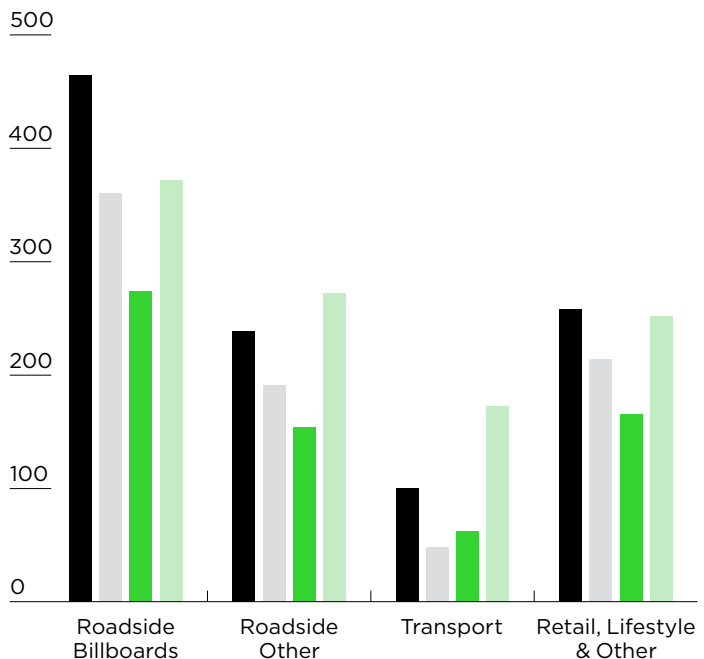
OOH PERFORMANCE BY QUARTER (\$M)

● 2022 ● 2021 ● 2020 ● 2019



OOH REVENUE ACROSS FORMATS & LOCATIONS (\$M)

● 2022 ● 2021 ● 2020 ● 2019

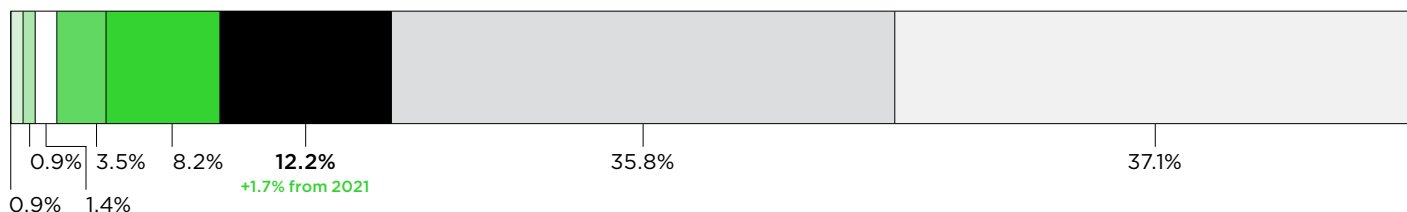


*Previously released revenue figures have been adjusted to reflect changes in the OMA membership.

AGENCY MEDIA SHARE SPEND

● Cinema
 ● Magazines
 ● Other
 ● News Media
 ● Audio
 ● Outdoor
 ● Digital
 ● Video

TOTAL AUSTRALIAN ADVERTISING SPEND: \$9B



Source: Standard Media Index (SMI). SMI figures reflect the spend by media agencies on behalf of clients, it does not include the advertising spend by advertisers who book directly with the media operator/channel.

TOP 10 OUT OF HOME CATEGORIES

| CATEGORY | 2022 RANK | 2021 RANK | OUT OF HOME (\$000'S) | ALL MEDIA (\$000'S) |
|-------------------------|-----------|-----------|-----------------------|---------------------|
| Retail | 1 | 1 | \$136,132 | \$2,477,705 |
| Communications | 2 | 2 | \$91,620 | \$971,218 |
| Finance | 3 | 3 | \$83,848 | \$708,099 |
| Entertainment & Leisure | 4 | 6 | \$83,831 | \$647,417 |
| Travel / Accommodation | 5 | 10 | \$61,027 | \$562,588 |
| Government | 6 | 5 | \$54,202 | \$334,177 |
| Media | 7 | 7 | \$48,052 | \$244,983 |
| Motor Vehicles | 8 | 4 | \$47,007 | \$590,071 |
| Beverages-Alcoholic | 9 | 9 | \$38,089 | \$98,884 |
| Food | 10 | 8 | \$34,942 | \$386,119 |

TOP 10 OUT OF HOME ADVERTISERS

| ADVERTISER | 2021 RANK | 2020 RANK | OUT OF HOME (\$000'S) | ALL MEDIA (\$000'S) |
|------------------------|-----------|-----------|-----------------------|---------------------|
| Paramount Global | 1 | 69 | \$14,303 | \$39,377 |
| Stan Entertainment | 2 | 1 | \$13,595 | \$67,421 |
| Commonwealth Bank | 3 | 2 | \$12,140 | \$41,933 |
| Streamotion | 4 | 3 | \$11,112 | \$44,651 |
| Ardent Leisure | 5 | 345 | \$9,661 | \$10,614 |
| McDonald's Restaurants | 6 | 4 | \$9,615 | \$99,609 |
| Foxtel | 7 | 9 | \$9,103 | \$37,773 |
| Amazon | 8 | 5 | \$9,010 | \$89,076 |
| Qantas | 9 | 19 | \$8,977 | \$32,908 |
| Optus | 10 | 29 | \$8,609 | \$63,061 |

Source: Nielsen Ad Intel 2023. Nielsen reserves the right to adjust spend estimates and associated ranking retrospectively. Spend estimates are for Jan-Dec 2022.

MOONFALL

ONLY IN CINEMAS
FEBRUARY 3

TM & © 2008



T.T.C. STRENGTH
STRENGTH SPECIALTY GYM

STRENGTH SPECIALTY GYM

WHERE THE DAMNED TRAIN

Instagram icon: @T.T.C.STRENGTH Facebook icon: T.T.C. STRENGTH

HERSTON CAR CLINIC
3252 3545



THANKS

THANKS

The OMA is more than just the sum of its parts. Out of Home (OOH) is an adventure of creativity that is underpinned by a collective effort of dedicated staff, smart committees, skilled suppliers and OOH devotees.



Our members are our foundation and we are grateful for their expertise and passion for the industry. Our progress and achievements in 2022 are thanks to their commitment and input into OMA initiatives that grow the industry.



Finance Committee

- Charmaine Moldrich, OMA (Chair)
- Chris Roberts, oOh!media
- Kate Solomon, QMS
- David Watkins, JCDecaux

Marketing Committee

- Tennille Burt, QMS
- Kirsty Dollisson, TorchMedia (Chair)
- Karissa Fletcher, Shopper
- Julie Jensen, OMA
- Paul MacGregor, VMO
- Tallulah Mills-Hicks, OMA
- Marie Norman, JCDecaux
- Samantha Shakspeare, Bishopp Outdoor Advertising
- Nicky Williams, goa
- Claire Woods, oOh!media

Net Zero Committee

- Tennille Burt, QMS
- Danielle Cameron, VMO
- Joe Copley, Seedooh
- Kirsty Dollisson, TorchMedia
- Caleb Harriott, Go Transit Media Group
- Paul Jennings, Bishopp Outdoor Advertising
- Julie Jensen, OMA (Chair)
- Anthony Kanaan, JCDecaux
- Heidi Lawrie, Total Outdoor Media
- Siobhan Marren, oOh!media
- Paul MacGregor, VMO
- Daniel McConochie, goa
- Raphael Owen, VMO
- Malcolm Pearce, QMS
- Adam Schildkraut, JOLT Charge
- Michael Selden, JOLT Charge
- Pete Tyquin, goa
- Jeremy Vary, JCDecaux
- Inese White, Total Outdoor Media
- Jamie Whitehead, oOh!media
- Sarah Young, oOh!media

PICTURED LEFT
OMA Christmas Party

Regulatory Affairs Committee

- Scott Baynes, JOLT Charge
- Danielle Cameron, VMO
- Michael Cali, oOh!media
- Kirsty Dollisson, TorchMedia
- Odette Ferreira, oOh!media
- Caleb Harriott, GoTransit
- Brad Lindsay, JCDecaux
- David Lovatt, oOh!media
- Melissa Maggs, goa
- Siobhan Marren, oOh!media
- Nick McAlpine, Bishopp Outdoor Advertising
- Jocelyn McDowall, JCDecaux
- Charmaine Moldrich, OMA (Chair)
- Luke O'Connor, AdFlow
- Tess Phillips, JCDecaux
- Damien Rath, JCDecaux
- Blair Robertson, Daktronics
- Adam Trevena, QMS
- Andrew Tyquin, Outdoor Systems
- Graeme Wöoster, QMS

MOVE Technical Committee

- Fleur Barlow, JCDecaux
- John Cochrane, VMO
- Edwina Colquhoun, oOh!media
- Tara Coverdale, oOh!media
- Julie Do, oOh!media
- Kirsty Dollisson, TorchMedia
- Kylie Green, MOVE (Chair)
- Grant Guesdon, MOVE 2.0
- Emily Lewis, TorchMedia
- Daniella Natoli, oOh!media
- James Nettlefold, QMS
- Ganjina Nozakova, MOVE
- Adele Rose, JCDecaux
- Emily Sak, Shopper
- Jordana Sherlock, QMS
- Cristina Smart, JCDecaux

MOVE 2.0 Advisory Group

- Angie Alexis, MediaCom
- Louisa Andrews, Starcom Media
- Laila Casey-Walsh, Carat
- Tom Carlon, UM
- Pia Coyle, Avenue C
- Alysia Engelsen, PHD
- Tahnee Fleming, Initiative
- Jess Florido, Initiative
- Dylan Friend, Carat
- Jarrod Girdler, Carat

- Rachel Girdler, Carat
- Grant Guesdon, MOVE 2.0
- James Lam, Spark Foundry
- Adam Lang, MOVE 2.0
- Amy Liang, Starcom Media
- Vanessa Metelovski, Initiative
- Oscar Morrison, Initiative
- Eliza O'connor, Initiative
- Mike Porter, MOVE 2.0 (Chair)
- Luke Preston, GroupM
- Laura Santalucia, Initiative
- Hannah Tsui, Zenith Optimedia
- Laiken Watts, UM
- Sam Willmer, UM

MOVE 2.0 Delivery Group

- Fleur Barlow, JCDecaux
- Maggie Burke, JCDecaux
- Suzie Cardwell, Scentre Group
- John Cochrane, VMO
- Edwina Colquhoun, oOh!media
- Tara Coverdale, oOh!media
- Kylie Green, MOVE
- Grant Guesdon, MOVE 2.0
- Kerrie Hatz, Ipsos
- Ali Inayathusein, Veitch Lister Consulting
- Monika Jakubczak, Ipsos
- Thomas Kim, Shopper Media
- Adam Lang, Relativity Consulting (Chair)
- Emily Lewis, TorchMedia
- Daniel McConochie, goa
- Kate Milligan, oOh!media
- Lauren Mullane, Scentre Group
- James Nettlefold, QMS
- Kat Orłowski, Tonic Media Network
- Michael Paech, Veitch Lister Consulting
- Adele Rose, JCDecaux
- Jemima Southgate, OMA
- Cassandra Thomas-Smith, MFA Research Representative
- Tim Veitch, Veitch Lister Consulting
- Michael Visner, Ipsos
- Christian Zavec, QMS

Programmatic Committee

- Sabarish Chirakkal, VMO
- Mark Fairhurst, QMS
- Grant Guesdon, MOVE (Chair)
- Emma Hegg, oOh!media
- Julie Jensen, OMA
- Brad Palmer, JCDecaux
- Michael Tobin, Tonic Media Network
- Laura Wall, QMS

Verification Committee

- Shae Bonney, oOh!media
- Adam Davison, QMS
- Joshua Day, oOh!media
- Sathyan Dharmakumar, JCDecaux
- Grant Guesdon, MOVE 2.0
- Nick Henley-Smith, JCDecaux
- Stephen Luck, oOh!media
- Charmaine Moldrich, OMA (Chair)
- Steve O'Connor, JCDecaux
- James Poole, Shopper
- Adam Rowe, oOh!media
- Jemima Southgate (Minutes)
- Malin Tau, VMO



MEMBERS

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

OMA MEMBERSHIP

The OMA experienced its most significant increase in membership this year, with 12 new members, marking its most substantial growth since its establishment in 1939. The OMA now represents nearly 100 per cent of the Australian Outdoor industry.

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

PICTURED BELOW

OMA Christmas Party

—
OMA Annual General Meeting & Awards



OMA membership is divided into three categories:

- 01 Media Owners:** Outdoor media companies that advertise third-party products* across all categories in the OOH sector, including airports, billboards and free-standing advertisement panels, buses, bus stations, cafes, light rail, office buildings and lifts, pedestrian bridges, railway stations, shopping centres, on street furniture (bus/tram/light rail shelters), trams, and universities.
- 02 Suppliers:** Businesses that provide goods and services to the OOH industry.
- 03 Asset owners:** Own the property where OOH advertising stands.

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



MEDIA OWNERS



SUPPLIERS



ASSET OWNERS



BENEFICIARIES

The arts, sports, government and charitable groups supported by the OOH industry in 2022.

Community

- Act for Kids
- AEIOU
- Airlie Beach Festival of Music
- Angel Flight Australia
- Asylum Seekers Resource Centre
- Australian Ballet
- Australian Children's Music Foundation
- Australian Conservation Foundation
- Australian Human Rights Commission
- Australian Industry Group
- Australian Red Cross
- Australians for Mental Health
- Autism QLD
- Barwon Health Foundation
- Batyr Australia
- Be Centre
- Bella's Footprints
- Beyond Blue
- Black Dog Institute
- Blue Ribbon Foundation
- Bowel Cancer Australia
- Boys do Cry
- Brainwave Australia
- Breast Cancer Trials
- Brighter Lives
- Bundaberg Show
- Burpees for Boobs
- Bush Heritage Australia
- BUSY AT WORK
- Cairns Organisation United for Cancer Health (COUCH)
- Cancer Council
- Careflight
- Celebrate Gungahlin Festival
- Challenge
- CheckUP
- Children's Hospital Foundation
- Children's Tumor Foundation of Australia
- Children's Cancer Foundation
- Choice Passion Life
- Clean Up Australia
- Connor's Run
- Cool Australia
- Cure Cancer Australia
- Cystic Fibrosis Australia
- Danny Frawley Centre
- Diversitat and MACS Geelong
- Dolly's Dream
- Endeavour Foundation
- Estee Lauder Breast Cancer Campaign
- FCK the Cupcakes
- Fight MND
- FNQ Wildlife Carers
- Fred Hollows
- Fruit2Work
- Fund for Peace
- genU
- Gift of Bread
- Give Where you Live Foundation
- Glaucoma Australia
- Global Citizen
- GO Foundation
- Greening Australia
- GROW
- Guide Dogs Australia
- Heart On My Sleeve
- Heartkids Australia
- Homes North Community Housing
- Humpty Dumpty Foundation
- International Women's Day
- Interrelate
- JCU Townsville Fire
- Jean Hailes
- Kidsafe Australia
- Kindness Factory
- Leukaemia Foundation
- Lifeline
- Lighthouse Foundation
- LIVIN
- Mackay Hospital Foundation
- Mackay Women's Services
- Magic Coat Foundation
- Make-A-Wish Australia
- Marine Rescue Bundaberg
- Maxima Indigenous Employment Services
- McDonald's Townsville Running Festival
- Melbourne Fashion Festival
- Mother's Day Classic
- Mount Isa Mines Rodeo
- Movember
- Multicultural Australia
- Musicians Making a Difference
- National Centre for Childhood Grief
- National Gallery of Victoria
- Neuroblastoma Australia
- North Queensland Cowboys
- North Queensland Football
- Northern Futures
- Orange Sky
- Ovarian Cancer Australia
- Ovarian Cancer Research Foundation
- OzHarvest
- Pink Hope
- Pinnacle Foundation
- Planet Ark
- Polished Man
- Queensland Brain Institute
- Radio Lollipop
- Raise Foundation
- Rare Cancers Australia
- Reach Foundation,
- Reconciliation Australia
- RizeUp
- Ronald McDonald House Charities
- Royal Brisbane and Women's Hospital
- Royal Brisbane Women's Hospital Foundation
- RSL Australia
- RSL QLD
- RSL WA
- RSPCA
- Running for Premature Babies
- Salvation Army Australia
- SANE Australia
- SecondBite
- Shake It Up Australia Foundation
- SisterWorks
- Skin Check Champions
- Sony Foundation
- Stall Tall 4 PTS
- Starlight Foundation
- Stay Kind
- Stepping Stone House
- Street Side Medics
- Surf Life Saving Foundation
- Surfing the Spectrum Foundation
- Sydney Breast Cancer Foundation
- Sydney Children's Hospital Foundation
- Sydney Festival
- Sydney Gay and Lesbian Mardi Gras
- Sydney Philharmonia Choirs
- Sydney Swans
- Taronga Conservation Society Australia
- The Conscious Planet
- The Life You Can Save
- The Mood Food Company
- The Pretty Foundation
- The Prince Charles Hospital Foundation
- The Pyjama Foundation
- The Starlight Foundation
- The Women's Centre
- Travellers Aid
- Tribal Warrior Tourism
- Triple R community radio
- Two Good Co.
- Uluru Statement of the Heart
- UN Global Compact
- UN Women Australia
- UNICEF
- UnLtd
- Variety the Children's Charity VIC
- Vietnamese Museum Australia
- Vinnies NSW
- Vision Australia
- White Ribbon Australia
- Whitelion
- Wilderness Society
- Wings for Life
- WomenCan
- Women's Basketball World Cup
- World Wildlife Fund for Nature's Earth Hour
- Wounded Heroes Association
- Youngcare
- Youth Off The Streets
- Zahra Foundation
- Zero Positive for Schools

Government

- ACT Government
- Australian Federal Government
- Australian Federal Police
- Australian Government Department of Health & Aged Care
- Brisbane City Council
- Council of Ambulance Authorities
- Health and Wellbeing QLD
- Hume City Council
- NAIDOC
- National Missing Persons Coordination Centre
- National Police Memorial
- NSW Department Premier & Cabinet

- NSW Environment Protection Authority
- NSW Government
- NSW Health
- NSW Rural Fire Service
- QLD Government Dept of Agriculture & Fisheries
- QLD Government Dept of Transport & Main Roads
- QLD Health
- SA Health
- SA Police Recruitment
- Safe Work Australia
- Tasmanian Vaccination Emergency Operations Centre
- Transport Canberra
- Transport NSW
- VIC Country Fire Authority
- VIC Electoral Commission
- VIC Government
- VIC Government Dept of Education and Training
- VIC Government Dept of Health
- VIC Government Dep of Jobs, Skills, Industry & Regions
- VIC Government Dept of Justice & Community Safety
- VIC Government Dept of Transport & Planning
- VIC Government Emergency Services Telecommunications Authority
- VIC Government Major Transport Infrastructure Authority
- VIC Government Transport Accident Commission
- VIC Police
- VicRoads
- WA Dept of Local Government, Sport and Cultural Industries
- WA Government
- WA Government Dept of Fire & Emergency Services
- WA Government Dept of Mines, Industry Regulation & Safety
- WA Government Road Safety Commission
- WA Police



PICTURED RIGHT
OMA Annual General Meeting & Awards

Recording

New Zealand Secret (Travel) Agents Quarterly Meeting

Richie Ink.org
RICK HARRIS
Mia's Roomed
Kia Ora
Kia Ora

NEW ZEALAND SECRET TRAVEL AGENTS

HEAPS
SECRET

So now it's time to aggressively accelerate our operations.

MIC Camera
AGG Share Record Tu Meke Anaha Kia Ora

Joint Winner, Best use of Digital, Q2
Tourism New Zealand, Secret Travel Agent

**“OOH IS CONSTANTLY EVOLVING,
AND WE ARE ON THE CUSP OF EXCITING
AND WORLD-FIRST INNOVATIONS.”**

ELIZABETH MCINTYRE
INCOMING CEO, OMA & MOVE

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ISO14001
EMS



Acid Free



Responsible
Forestry
Practices



Carbon
Neutral



Element
Chlorine Free

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**OUTDOOR
MEDIA
ASSOCIATION**