



OMA

National Health and Wellbeing Policy

Annual Report 2021-2022

Foreword



With green shoots and positive signals ahead, the Outdoor industry continues to recover from the COVID-19 pandemic. The two years of lock-down have not dissuaded our commitment to act in the best interest of the Australian community, and in 2021 the industry unified to donate advertising space valued at \$123M to a variety of community-serving causes.

As many still struggle with the after-effects of the COVID-19 pandemic, attention on mental health issues is increasing. One key factor for good mental and physical health is a well-balanced diet, and with

the National Health and Wellbeing Policy operating in its second year, the Outdoor industry is playing its part to support a healthy community.

A recent study by Fruit & Vegetable Consortium (FVC) reports that 91 per cent of Australians are not eating the recommended 5+ serves of vegetables each day¹ which is linked to two thirds of the population living with overweight or obesity, which is 12.5 million Australians.² The Outdoor industry in Australia is proud to have launched the first-ever industry-led National Health and Wellbeing Policy in 2020, and this year we have continued our commitment to support healthy lifestyle decisions.

Importantly, the restriction of advertising of less healthy food and drink products from being displayed within a 150m sightline of a primary or secondary school in Australia, is working. This year, there were zero breaches across the 6,000 signs within this zone.

Additionally, the Outdoor industry's commitment to annually develop and run a health and wellbeing campaign valued at \$3M of advertising space was implemented in partnership with Health and Wellbeing Queensland and Nutrition Australia. The campaign *Better than you remember* was live from 30 January to 26 February 2022 on OOH signs nationwide, reaching 10.4 million Australians with OMA members donating advertising space valued at \$8M.³

Operating 24/7 in the public domain and reaching 93 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. The National Health and Wellbeing Policy is just one way that as an industry we can help support government's actions to halt the rise and reduce the incidence of overweight and obesity in Australia.

I invite you to review our National Health and Wellbeing Policy Annual Report for 2022 to see the positive impact we have made this year.

Charmaine Moldrich,
Chief Executive Officer, OMA and MOVE

Sources:

¹ Fruit & Vegetable Consortium (FVC), *Shifting the Dial on Vegetable Consumption: Quantitative Community Research*, 2022.

² Australian Bureau of Statistics, *National Health Survey first results, 2017-2018*, abs.gov.au.

³ MOVE report OMA *Better than you remember*, demographics 14+.

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2. Executive summary

18
**food and
beverage
advertisements
reviewed**

98
**training session
attendees**

0
breaches

In 2020, the Outdoor advertising industry created a world-first, national Policy that restricts the placement of occasional food and drink advertising from around schools to reduce the opportunity for children under 15 years of age to see advertisements for unhealthy food and drinks.

Since the Policy came into effect, the feedback from government, industry and community has been overwhelmingly supportive.

In the second year of the Policy's application, the Outdoor Media Association (OMA) reviewed 18 food and beverage advertisements for compliance. Of those 18 advertisements, none were rejected from running on OMA member signs, which we believe shows that our members have a thorough understanding of the Policy.

Additionally, the OMA trained 98 people on the Health and Wellbeing Policy. Attendees were from OMA member organisations, agencies and other interested groups.

In November 2021, the Australian Association of National Advertisers (AANA) introduced the new Food and Beverages Advertising Code – applying strict rules to all food and beverages advertisements in Australia. The OMA has worked closely with the AANA to ensure that OMA self-regulatory schemes and policies are complementary to AANA codes.

From July 2022, the OMA transitioned from the Health Star Rating (HSR) to Food Standards Australia and New Zealand (FSANZ) as the standard for defining what is and what is not occasional food. The use of FSANZ in the OMA National Health and Wellbeing Policy makes it easier for advertisers to ensure their compliance to the OMA's National Health and Wellbeing Policy and easier for consumers to gain a better understanding of healthy nutrition.¹

In January 2022, the OMA, in partnership with Health and Wellbeing Queensland and Nutrition Australia, successfully ran the *Better than you remember* campaign reaching 10.4 million Australians with \$8M advertising space donated by OMA members.²

3. Introduction

3.1.1 World Health Statistics

According to World Health Organisation's (WHO) World Health Statistics 2022, overweight and obesity are key risk factors for individuals and for public health.³ From 2000, obesity in children, adolescents and adults has increased in all age groups and in all WHO regions, including Australia. Overweight and obesity are major risk factors for asthma, cancer, cardiovascular disease, dementia, diabetes, kidney disease, musculoskeletal disorders and are associated with higher rates of death.

3.1.2 Shifting the dial on vegetable consumption

In 2022, KPMG and the Fruit and Vegetable Consortium published a report on shifting the dial on vegetable consumption and rebuilding healthy families in a COVID-19 affected and disrupted Australia.

The report highlights the adverse effect the pandemic had on people's eating behaviour and how it contributed towards a generation of Australians facing a health crisis.⁴ During lockdowns, close to half of the population developed less healthy food habits such as purchasing more takeaway meals, increased snacking while working or studying from home, and overeating caused by stress and anxiety.

Despite a willingness to eat healthier food and an understanding of the importance of a nutritious diet, 91 per cent of Australians are still not eating the recommended 5+ serves of vegetables each day, as per the Australian Dietary Guidelines. The research found that consumers attribute the following reasons to not eating enough vegetables: they are expensive, have a short shelf-life and preparing them is difficult and time consuming.

3.1.3 Australian Government: National Obesity Strategy

The Australian Government's Department of Health and Aged Care National Obesity Strategy is a 10-year framework for action to reduce overweight and obesity in Australia.⁵ The aim is for Australian children, adolescents

and adults to maintain a healthy weight and to achieve two targets:

1. Halt the rise and reverse the trend in the prevalence of obesity in adults by 2030.
2. Reduce overweight and obesity in children and adolescents aged 2-17 years by at least five per cent by 2030.

Therefore, three drivers need to be pursued:

1. Creating supportive, sustainable and healthy environments.
2. Empowering people to stay healthy.
3. Access to early intervention and care.

3.2 About the OMA

The OMA is the peak industry body that represents companies that display advertisements, own signs, and provide services to the industry. Out of Home (OOH) is advertising for products and services that you see outside the home, on a variety of signs, across various locations.

OMA members make significant economic contributions to both government and the community, contributing \$647M to Australia's Gross Domestic Product (GDP). Most OMA members are Australian owned and operated, paying taxes in Australia and with profits going back to the Australian economy.

3.3 The Health and Wellbeing Policy

The OMA's National Health and Wellbeing Policy builds on its existing Placement Policy first implemented in 2009. The Placement Policy restricts the advertising of alcohol, gaming and wagering, and sexual products and services from being displayed within a 150m metre sightline of an Australian primary or secondary school.

Under the National Health and Wellbeing Policy, the Placement Policy now also restricts occasional food and drinks from being displayed around schools. The OMA's National Health and Wellbeing Policy was launched on 24 February 2020 and came into effect on 1 July 2020.

3.4 The Outdoor industry's commitment

As part of the National Health and Wellbeing Policy was a commitment from the Outdoor industry to donate \$3M of advertising space each year to a national healthy lifestyle campaign. The OMA works with government and non-government organisations to develop the campaign each year, with a focus on promoting healthy choices.

3.5 About Out of Home advertising

OOH advertising is one of the oldest and purest forms of media. Prior to the COVID-19 crisis, it had been the only form of traditional advertising that had seen its audiences grow year-to-year. This growth is based on increased urbanisation which has seen audiences grow

31 per cent vs 20.4 per cent population growth in the last nine years.

OOH advertising comprises many different formats as classic OOH or digital Out of Home (DOOH) as well as in different locations including billboards, bus stops, office foyers and lifts, public transport, shopping centres, telephone booths and train stations.

OOH advertising ensures the flexibility and immediacy required to meet a broad range of communications demands, from local business promotions to national commercial advertising, community issues to public service announcements.

OOH advertising is a trusted channel used by federal, state and local government to broadcast awareness campaigns for public health and community service messaging.



Add an extra handful of veggies campaign (2021)

4. About the Policy

4.1 A world first

When it was launched in February 2020, the National Health and Wellbeing Policy became the strictest national advertising regulatory scheme in the world and today remains the only nationally consistent restriction on the placement of food advertising. The Outdoor industry is proud to take this leadership position.

4.2 Consultative and collaborative

The OMA and its members have worked with food groups, advertisers, health promotion experts and government to devise the Policy. The OMA is committed to ensuring the Policy remains best practice for the industry with a commitment to review and report on its efficacy each year.

4.3 Evidence-based

The OMA has undertaken extensive research on Australian and international best practice to formulate the Policy.

4.4 Place-based

The Policy uses schools as a touchpoint because there is at least one in every suburb, as well as being centrally located. Schools are the hubs of communities everywhere; the buildings and grounds are used for more than just school activities – they are embraced by local communities every day.

Compliance with the Policy is made possible through the Outdoor industry's investment in the MOVE school mapping tool, a web-based interactive tool for media buyers, advertisers and OMA members.

The MOVE school mapping tool allows OMA members to map the location of their individual signs to primary and secondary schools, accurately highlighting which signs are captured by the Policy.

4.5 Emphasis on education

Noting that overweight and obesity are complex problems which require multi-faceted solutions, the OMA has developed the Policy with a view to educating communities on healthy lifestyles.

In addition to restricting occasional food and drinks from being displayed around schools, the Outdoor industry has committed to donating \$3M of advertising space to a healthy food campaign each year.

OMA members, with decades of experience in creating successful campaigns, also offer creative support and advice to maximise the success of each campaign, and the OMA monitors the efficiency of the campaigns.

4.6 Transparent monitoring

The OMA monitors the implementation and effects of the Policy and shares the results with government annually.

“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, Health and Wellbeing Queensland Chief Executive

5. Supporting the Policy

5.1 Copy Advice

In the 12 months between July 2021 and June 2022, the OMA Copy Advice service reviewed 18 food and beverage advertisements pertaining to the National Health and Wellbeing Policy. Of these, none were rejected for display within the restricted zone.

This low number, combined with zero breaches this year, indicates that OMA members understand the policy and their internal review processes are working well.

5.2 Website

The OMA launched www.healthyoutdoor.org as one source for all information regarding the Policy. The website hosts education resources and information materials as well as details about the national health and wellbeing campaigns *Add an extra handful of veggies* (2021) and *Better than you remember* (2022). The website received 1,000 visits during the first month of the launch of the Policy and has had more than 3,400 visits since its launch.

5.3 Training sessions

The OMA holds regular training sessions on all of its policies and self-regulatory codes.

These training sessions are designed to help members apply the rules around advertising food and beverage products, alcohol, gambling and wagering, sexual services, political advertising and the placement of such content.

In 2021 and 2022, the training sessions were attended by 322 participants and the recorded webinar remains available for OMA members on the OMA website.



Better than you remember campaign (2022)



Better than you remember campaign (2022)

6. Health and wellbeing campaign

6.1 Better than you remember

The *Better than you remember* campaign marked the second year of the OMA partnering with government on a national healthy lifestyle campaign. With the growth in OMA membership, allocation of signs exceeded the requested amount, totalling \$8M in advertising space donated.²

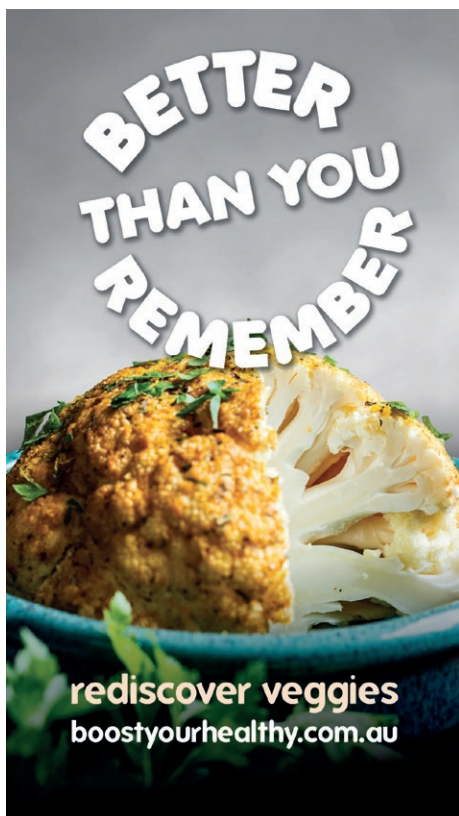
Developed by Health and Wellbeing Queensland and Nutrition Australia, three campaign creatives ran from 30 January to 26 February 2022 on Outdoor signs reaching 10.4 million people nationwide. It encouraged Australians to rediscover and think differently about how they consume vegetables.

6.2 Results

The aim of the national health and wellbeing campaigns is to educate the Australian community and to influence positive behaviour change. To gauge success, the OMA works with independent market research companies to conduct surveys and analysis after each industry campaign.

“It is expected this initiative involving donated advertising space will reach up to 12 million Australians. I congratulate members of the Outdoor Media Association for utilising their signs to make a positive difference to the health of Australians – including children returning to school – across the country.”

Hon Greg Hunt, former Minister for Health and Aged Care



Better than you remember campaign (2022)

6.3 Nationwide survey results

The OMA conducted a post-campaign study surveying 1,217 Australians in total with 50 per cent parents, 50 percent not parents.

27%

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

40%

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

55%

of people were encouraged to visit the campaign website.

13%

of people talked to family and friends about the campaign.

The research found that the message *Better than you remember* had high cut through among parents with 40 per cent of parents saying they were encouraged to include vegetables in their meals and to make healthier choices for their children's meals.⁶ The *Better than you remember* campaign motivated two out of three people to visit www.boostyourhealthy.com.au and 13 per cent of people talked to family and friends about the campaign.



Better than you remember campaign (2022)

6.4 Format-specific survey results

The OMA ran a secondary survey with OMA member Shopper, who have signs in shopping centres, to gauge cut-through for the campaign specifically with people in shopping centre environments. Using the Shopper Study Survey platform, this post-campaign study surveyed 3,547 Australians.

65%

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

73%

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

31%

of people were encouraged to visit the campaign website.

The results show greater cut-through for the campaign within shopping environments, where it was most relevant in the moment.⁷ Parents with children under 15 years of age, had the highest recall of the campaign with 70 per cent, and 73 per cent of those said they purchased more veggies as a result.



Better than you remember campaign (2022)

7. Investigating creative impact

7.1 Campaign comparison

At the end of the *Better than you remember* campaign, the OMA evaluated the combined impact of the two national health and wellbeing campaigns that have run to-date.

The post-campaign survey from the 2021 campaign, *Add an extra handful of veggies*, showed a high level of recall and consideration with one in two people recalling the campaign.⁸

48%

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

86%

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

60%

of people were encouraged to visit the campaign website.

65%

of people talked to family and friends about the campaign.

The message *Add an extra handful of veggies* had high cut-through among parents with 86 per cent of parents saying they were encouraged to include vegetables in their meals and 80 per cent of parents saying they were encouraged to make healthier choices for their children's meals.

The *Add an extra handful of veggies* campaign motivated two out of three people to visit www.eatforhealth.com.au and 65 per cent of people to talk to family and friends about the campaign.

These survey results demonstrate that the *Add an extra handful of veggies* campaign message was memorable, influenced positive behaviour change and sparked conversations.



Add an extra handful of veggies campaign (2021)

Post-Campaign Survey Results



27%
65%
48%

Recall

of people remembered seeing the campaign in Out of Home media



40%
73%
86%

Action

of parents were encouraged to include veggies in their children's meals



55%
31%
60%

Information

of people were encouraged to visit the campaign website



13%
n/a
65%

Talkability

of people talked to family and friends about the campaign

- Dynata Survey commissioned by the OMA for *Better than you remember* n=1,217
- Shopper Study Survey OMA *Better than you remember* n=3,547
- Dynata Survey commissioned by the OMA for *Add an extra handful of veggies* n=1,200; parents with children under 15 n=775

7.2 Neuroscience study

Given the wide variation in recall rates of the two campaigns, the OMA engaged Neuro-Insight, a neuro-analytics company, to investigate the creative impact.

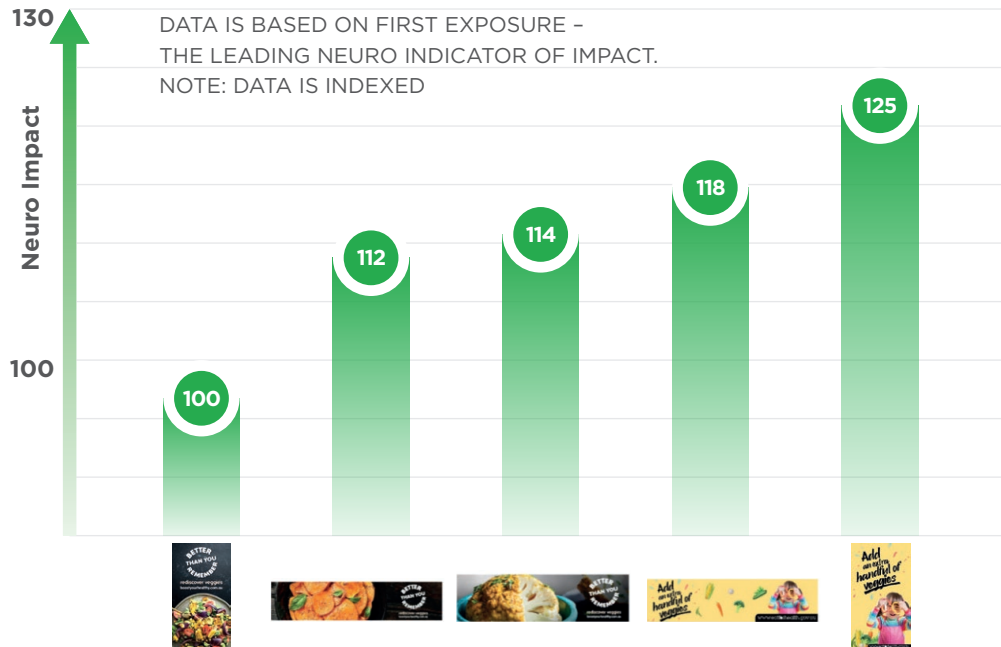
The Neuro Impact Factor (NIF) is a specialised approach that quantifies the subconscious impact of a media environment as individuals naturally experience it. The NIF is based on Neuro-Insight's scientifically and market validated metrics; long term memory encoding and emotional intensity with the specific behaviour of each metric also incorporated into the formula. Both measures are key subconscious drivers in how memory is processed and subsequently stored. The "peaks" play an important role in memory creation and have been shown to predict future behaviour.

Neuro-Insight evaluated six health and wellbeing campaign creatives to define the most effective creative execution. The creatives were measured via long term memory encoding, engagement, approach/withdraw, emotional intensity and desirability to ascertain the most effective form of creative – the Neuro Impact Factor. Eventually, the creatives were indexed against each other to show the one which has the most impact.

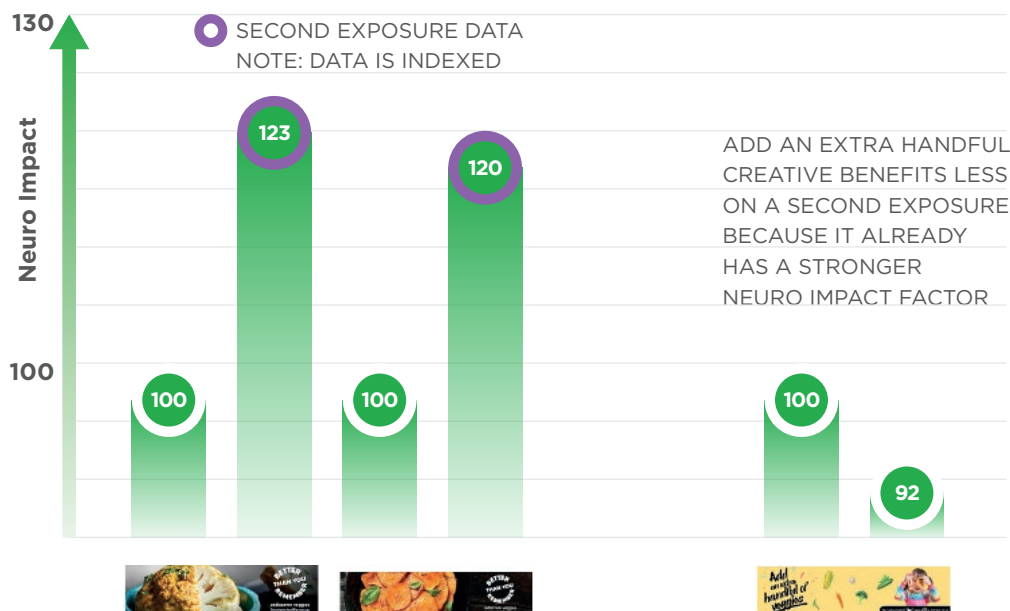
The evaluation took place in Melbourne with a sample composed of even gender and demographic split. Participants were exposed to a 30-minute test reel on a standard flat screen television. The reel consisted of a driving simulation with Out of Home signs throughout Melbourne. The selected creatives were embedded in Out of Home signs during the viewing experience and shown for ten seconds.



The neuroscience study shows that the *Add an extra handful of veggies* campaign creative generated the most brain activity.⁹



The first exposure data show the initial brain activity in reaction to the shown campaign creative. The creatives are ranked from left to right with increasing Neuro Impact Factor score. The portrait version of the *Add an extra handful of veggies* campaign creative received the highest Neuro Impact Factor score.⁹



The second exposure data provide insight into the role of frequency and how recipients react to the repeated shown campaign creative. The *Better than you remember* campaign creative benefitted the most and received the highest Neuro Impact Factor score.⁹

7.3 Eye tracking study

An Artificial Intelligence (AI) predictive eye-tracking model was applied to each campaign creative to show the distribution of attention.



The *Add an extra handful of veggies* campaign creative in portrait version received strong results with 51 per cent of visual attention on the messaging, 17 per cent of visual attention on the child, six per cent of visual attention on the vegetable and less than one per cent of visual attention on the link to the website.⁹



The *Better than you remember* campaign creative in portrait version received successful results with 52 per cent of visual attention on the veggies, 18 per cent of visual attention on the messaging and 14 per cent of visual attention on the link to the website.⁹

7.4 Summary of Neuroscience study

To summarise the Neuroscience study results:

- The *Add an extra handful of veggies* campaign creative received the highest Neuro Impact Factor results with most attention on the messaging and least attention on the link to the website.
- The *Better than you remember* campaign creative benefitted most from second exposure demonstrating that frequency and the repeated shown campaign creative help to build a higher Neuro Impact Factor score.
- The *Add an extra handful of veggies* campaign contained one creative. The *Better than you remember* campaign contained three creatives. As the *Add an extra handful of veggies* campaign received the highest brain activity, Neuro Impact Factor results and gaze activity, the fact that one creative was consistently used, helped the campaign's overall performance.
- The small format portrait creatives benefitted the most from second exposure and received the most attention on the campaign's message.

8. Out of Home for good

8.1 Community service campaigns

The Outdoor industry understands the important role OOH advertising plays in the public space and takes this responsibility seriously. The OMA and its members regularly run community service campaigns across Australia to raise awareness for community issues and to broadcast crucial information.

In 2021, the Outdoor industry donated media space and advertising production for community service campaigns valued at an estimated \$123M and supported over 140 beneficiaries including charities, healthcare and environmental organisations, public bodies and arts and cultural organisations.

Additionally, the OMA works closely with community groups, local and state government to ensure that Outdoor advertising is planned and executed to support the Australian community.

8.2 Code of Ethics

The Outdoor industry follows a strict self-regulatory scheme ensuring that content meets prevailing community standards. For all OMA members, compliance with the self-regulatory scheme is a condition of membership.

The OMA works closely with the Australian government and a range of other stakeholders to ensure that its self-regulation and OMA Codes of Ethics policies are appropriate, responsive and practical.

Also, OMA members and advertising publishers are subject to the Australian Association of

National Advertisers (AANA) Code of Ethics – which is the main self-regulatory scheme for the Australian advertising industry.¹⁰

These OMA self-regulatory policies and the AANA Code of Ethics ensures the Outdoor industry and its stakeholders follow any changes in community standards and government priorities.

8.3 Advisory Service

In 2021, the OMA reviewed 368 ads. Of these 66 were rejected and 30 were modified to comply with the codes.

Because OMA members have been complying with OMA self-regulatory schemes and policies as well as the AANA Code of Ethics since 1997, compliance with the National Health and Wellbeing Policy is now part of the everyday process of posting ads.

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

The OMA's Copy and Concept Advisory Service helps eliminate the likelihood of an OOH advertisement breaching one or more of the 18 self-regulatory codes and policies OMA members adhere to.

The service is complemented by regular training sessions for OMA members and relevant stakeholders.

The OMA takes responsibility for keeping the self-regulatory schemes and policies up to date and educating OMA members on any changes.

“We love seeing veggies on billboards and believe more promotion like this is needed. Vegetables are at the very centre of healthy eating and a critical part of our diet for people of all ages. They can safeguard us from chronic health conditions – such as diabetes, stroke, heart disease and obesity, but we still don’t eat as many as we should. We are thrilled to be involved in this year’s campaign and provide tips and recipes that can make healthy eating tasty and accessible. This campaign is topical as you can boost your immune system by upping your veggie intake. A great annual initiative by the OMA and their members.”

Lucinda Hancock, CEO of Nutrition Australia Vic, SA, Tas, WA Divisions

9. Looking forward

9.1 Self-regulatory Policies

The OMA is committed to reviewing its self-regulatory framework following its 18 policies and codes of practice. The National Health and Wellbeing Policy is one of them and is being reviewed annually by the OMA Board.

The review process involves consultation with OMA members and, where relevant, other relevant stakeholders including Australian the Federal Government, Australian State Governments as well as the AANA.

During that time, the OMA will review feedback received from stakeholders as well as consult with OMA members on the operation of the policy and make any changes required to ensure the policy remains robust and fit for purpose.

9.2 New Food and Beverages Advertising Code

The new AANA Food and Beverages Advertising Code took effect on 1 November 2021. The AANA Code applies strict rules to all food and beverage advertisements in Australia, reducing the opportunity for children under 15 years of age to see advertisements for unhealthy food and drinks.¹⁰

The OMA has worked closely with the AANA to ensure that OMA self-regulatory schemes and policies and AANA codes are complementary, making the wider system of self-regulation, policies and codes more robust.

The OMA continues to work with the AANA and other relevant stakeholders to ensure that the system continues to operate optimally.

9.2.1 A more robust system

In 2020, when the world-first National Health and Wellbeing Policy was launched, the OMA selected the Health Star Rating (HSR) system as the standard for defining what is and what is not occasional food and drink.

The HSR system was considered optimal because it aimed to build a better understanding for healthy nutrition amongst the population and was easy to understand by consumers.

In 2021, the new AANA Food and Beverages Code came into effect utilising the Food

Standards Australia and New Zealand (FSANZ) Nutrient Profile Criteria to define occasional food and drink products.

Both systems are governed by similar equations and speak to the nutrient profile of a food to determine its status as occasional or every day.

From July 2022, the OMA transitioned from the use of HSR system to the FSANZ within the National Health and Wellbeing Policy – acknowledging that self-regulatory schemes and policies must be adaptive to remain robust.

The benefit of having one standardised definition of occasional food among the wider Outdoor industry is that the system becomes stronger and more effective.

9.3 Breaches

Ad Standards manages the complaint resolution process of the advertising self-regulation system in Australia. The Ad Standards Community Panel is an independent body established to determine consumer complaints against the self-regulatory codes.

Usually, advertisers are very careful not to breach regulations. The visible placement of OOH advertising in the public space means a great responsibility to the audience and to the community. However, there is always the chance for incorrect judgement calls and human error to occur. As per OMA members' commitment, affected advertisements must be removed within 24 hours.

Last year, the OMA continued to uphold the gold standard in advertising content with no breaches issued by Ad Standards.

9.4 Prospective campaigns

The OMA has begun work on the 2023 healthy lifestyle campaign in partnership with Health and Wellbeing Queensland and Nutrition Australia for the second year.

And, with new members signing up to the Association in 2022 who specialise in point of sale, retail and health environments, it is hoped that the 2023 campaign will have even greater impact.

10. OMA members

Media Owners



Suppliers



Asset Owners



11. References

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