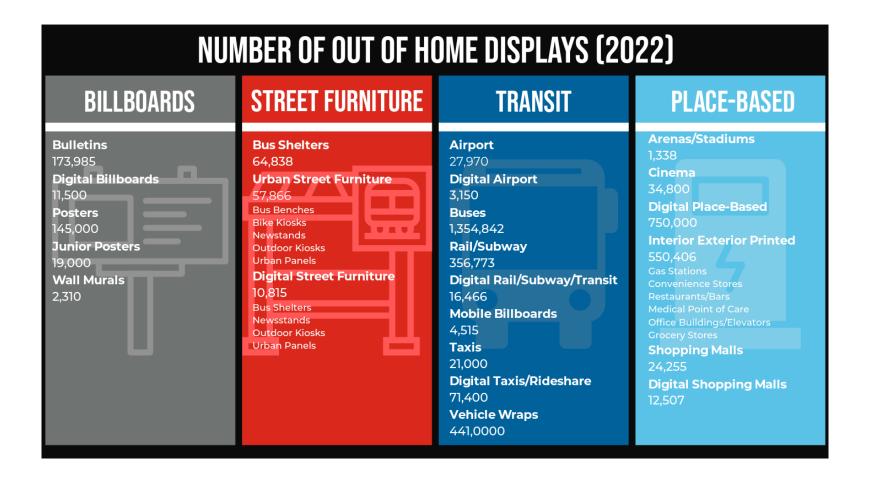


Ad Spend Performance

OOH Advertising Displays Nationwide



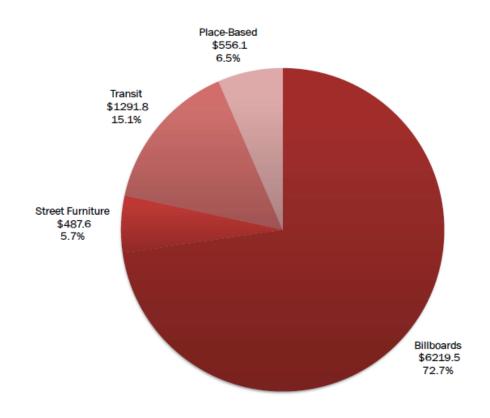


Source: OAAA

OOH Ad Spend Grew 20.7% to \$8.6 Billion



2022 YE Total OOH Revenue \$8.55 Billion



2022 Category Performance versus 2021

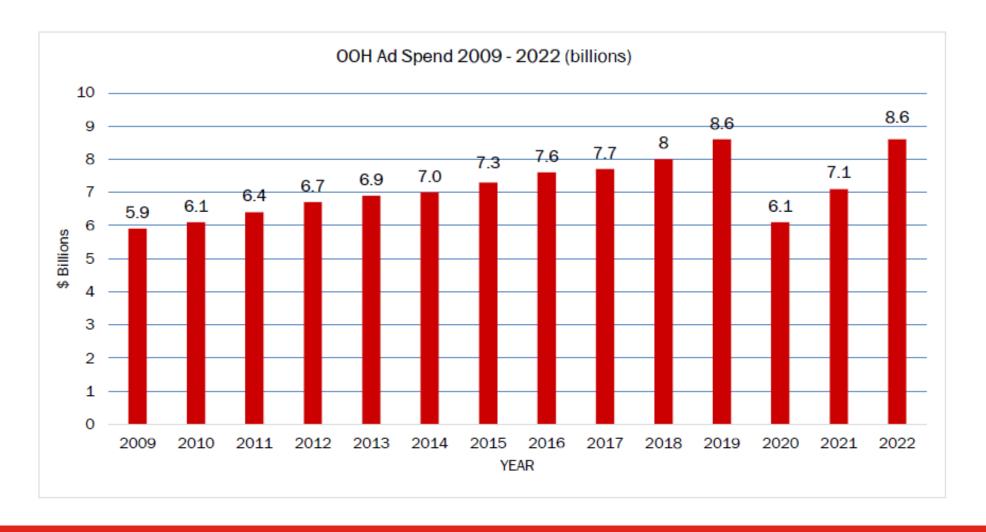
- Billboards +11%
- Street Furniture +27%
- Transit +49%
- Place-Based +67%

DOOH Growth = +24%

Digital OOH represents 29% of total OOH, format figures in millions. Source: OAAA

2022 Surpasses Record High Set in 2019





Source: OAAA

OOH Ad Spend: Top 10 Product Industries



Industry Categories	Jan -Dec 2022 (000)	Percent of Total Revenue	Rank	Jan - Dec 2021 (000)	Rank	Category Growth Jan - Dec '22 vs '21 (000)	Percentage Change Jan - Dec '22 vs '21 (%)
LOCAL SERVICES & AMUSEMENTS	\$2,110,475.7	24.7%	1	\$1,820,918.8	1	289,556.9	15.9%
RETAIL	\$801,597.9	9.4%	2	\$722,699.3	2	78,898.6	10.9%
MEDIA & ADVERTISING	\$758,200.4	8.9%	3	\$552,652.4	3	205,547.9	37.2%
GOVERNMENT, POLITICS & ORGS	\$584,900.9	6.8%	4	\$474,714.2	6	110,186.6	23.2%
PUBLIC TRANS., HOTELS & RESORTS	\$557,969.0	6.5%	5	\$361,349.7	8	196,619.4	54.4%
RESTAURANTS	\$557,789.6	6.5%	6	\$488,884.8	5	68,904.7	14.1%
FINANCIAL	\$483,033.7	5.6%	7	\$403,861.4	7	79,172.3	19.6%
INSURANCE & REAL ESTATE	\$457,693.2	5.3%	8	\$517,226.0	4	-59,532.8	-11.5%
SCHOOLS, CAMPS & SEMINARS	\$292,977.3	3.4%	9	\$240,899.8	10	52,077.5	21.6%
AUTOMOTIVE DEALERS & SERVICES	\$282,327.4	3.3%	10	\$269,240.9	9	13,086.5	4.9%
Total Top Ten Categories	\$ 6,886,964.9	80.5%		\$5,852,447.3		\$1,034,517.6	

The top 10 product industries account for 81% of total OOH spend

Source: Vivvix, OAAA.

Note OAAA estimates Vivvix captures approximately 72% of total OOH spend.



OOH Ad Spend: Top 25 Product Categories



Hospitals, Clinics & Medical Centers

Legal Services

Quick Serve Restaurants

Consumer Banking

Domestic Hotels & Resorts

Colleges & Universities

Local Government

Television & Cable TV

Chain Food Stores & Supermarkets

Real Estate Agents, Agencies & Brokers

Computer Software

Motion Pictures

Computer & Software Stores/Services

Apparel General

Religious, Charitable & Humanitarian

Casual Dining Restaurants

Medical & Dental Insurance

Amusements & Events

Live Theater, Opera, Music, Dance

Internet Communications Providers

Beauty, Health & Medical Services

Organizations

Retailers

Jewelry Stores

Cable Networks & Programs & Satellite TV

The top 25 product categories account for over half (54%) of total OOH spend



Top Ten OOH Advertisers and Parent Companies



Advertisers

- Apple
- McDonald's
- Amazon
- Panera
- Google
- American Express
- T-Mobile
- Disney
- Coca-Cola
- Universal Pictures



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Parent Companies

- Walt Disney Company
- Comcast Corp.
- Apple Inc.
- Paramount Global
- Amazon.com Inc.
- McDonald's Corp.
- Warner Bros Discovery Inc.
- JAB Holding Co.
- Alphabet Inc.
- LVMH Moet Hennessy Louis Vuitton SA

Top 20 00H Advertisers: \$ Increase over 2021 Spend



ADVERTISER	2022 00H Spend	2022 00H Spend Rank	2021 OOH Spend	OOH \$ Spend Increase in 2022
Panera	\$46,931,451	4	\$7,365,843	\$39,565,608
Stellantis	\$23,712,319	19	\$32,180	\$23,680,139
Google	\$45,856,846	5	\$23,091,567	\$22,765,279
Paramount	\$25,554,557	16	\$3,422,830	\$22,131,728
Pinterest	\$22,702,011	21	\$634,013	\$22,067,998
Apple	\$82,608,677	1	\$65,074,871	\$17,533,806
Airbnb	\$17,739,454	30	\$1,057,052	\$16,682,402
Uber	\$29,583,905	11	\$13,709,096	\$15,874,809
Capital One	\$24,032,430	17	\$8,394,752	\$15,637,678
T-Mobile	\$33,517,016	7	\$18,592,482	\$14,924,533
American Express	\$41,377,682	6	\$26,811,753	\$14,565,929
Novo Nordisk	\$14,393,872	38	\$46,276	\$14,347,596
Samsung	\$26,645,334	14	\$12,871,720	\$13,773,614
IHG	\$14,869,641	37	\$1,450,676	\$13,418,965
Disney	\$31,038,136	8	\$17,731,185	\$13,306,951
Pfizer	\$14,047,891	40	\$895,331	\$13,152,560
Universal Pictures	\$30,566,843	10	\$18,096,992	\$12,469,851
Expensify	\$17,713,633	31	\$5,301,879	\$12,411,754
Netflix	\$28,584,163	12	\$18,597,816	\$9,986,348
LVMH	\$17,792,978	29	\$7,941,732	\$9,851,246



Top 10 00H Advertisers: % Increase over 2021 Spend



ADVERTISER	2022 00H Spend	2022 OOH Spend Rank	2021 00H Spend	OOH % Spend Increase in 2022
VRBO	\$8,479,699	66	\$0	8479699242%
Stellantis	\$23,712,319	19	\$32,180	73587%
Novo Nordisk	\$14,393,872	38	\$46,276	31004%
Pinterest	\$22,702,011	21	\$634,013	3481%
Univision	\$6,110,427	93	\$184,990	3203%
Airbnb	\$17,739,454	30	\$1,057,052	1578%
Pfizer	\$14,047,891	40	\$895,331	1469%
IHG	\$14,869,641	37	\$1,450,676	925%
Paramount	\$25,554,557	16	\$3,422,830	647%
Panera	\$46,931,451	4	\$7,365,843	537%



Top 25 Local OOH Ad Spend Markets



OOH Ad Spend		
<u>Rank</u>	DMA MARKET	Total OOH Ad Spend
1	NEW YORK	\$809,578,499
2	LOS ANGELES	\$593,269,702
3	CHICAGO	\$240,778,086
4	SAN FRANCISCO	\$210,367,799
5	MIAMI	\$190,468,589
6	DALLAS	\$176,641,868
7	ATLANTA	\$175,842,061
8	ALL OTHER	\$165,299,241
9	ORLANDO	\$144,789,736
10	PHILADELPHIA	\$128,131,561
11	HOUSTON	\$124,963,182
12	BOSTON	\$114,820,147
13	LAS VEGAS	\$108,543,392
14	PHOENIX	\$104,091,882
15	WASHINGTON,DC	\$101,729,465
16	TAMPA	\$100,124,732
17	MINNEAPOLIS	\$77,992,430
18	DETROIT	\$75,502,043
19	SAN DIEGO	\$67,708,874
20	DENVER	\$62,782,319
21	SACRAMENTO	\$57,238,637
22	NASHVILLE	\$56,969,950
23	SEATTLE	\$51,227,729
24	HARRISBURG	\$49,428,951
25	SALT LAKE CITY	\$46,922,044



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Top 25 00H Markets by Share of Total Local Ad Spend



Total Local					
Ad Spend		Total Local Ad	OOH Local Ad	OOH Ad	OOH Share of DMA
Rank	DMA MARKET	Spend	Spend	Spend Rank	Local Ad Spend
154	RAPID CITY	18,735,297	11,169,426	89	60%
186	MANKATO	7,623,917	4,051,543	137	53%
164	CASPER	14,406,194	7,228,069	116	50%
185	VICTORIA	7,726,991	3,647,049	139	47%
128	BILOXI	36,345,589	14,072,124	70	39%
162	JACKSON,TN	16,011,636	6,141,878	123	38%
148	ODESSA	19,870,210	7,581,210	112	38%
140	BILLINGS	23,373,238	8,420,243	107	36%
157	LAKE CHARLES	17,459,680	6,254,277	122	36%
172	ALEXANDRIA	12,779,013	4,539,398	130	36%
139	DULUTH	23,746,946	8,105,371	109	34%
180	BLUEFIELD	9,776,585	3,264,040	141	33%
135	ERIE	26,434,426	8,397,924	108	32%
150	WHEELING	19,703,372	5,992,970	125	30%
137	PANAMA CITY	24,731,197	7,469,130	113	30%
114	BOISE	49,527,299	14,701,876	68	30%
120	PALM SPRINGS	45,348,580	13,420,553	77	30%
133	SALISBURY	29,426,460	8,690,447	104	30%
103	MYRTLE BEACH	55,099,055	16,250,083	59	29%
163	YUMA	15,157,925	4,362,786	134	29%
118	WILMINGTON	47,162,216	13,492,140	75	29%
90	HUNTSVILLE	61,900,337	17,640,684	57	28%
63	MOBILE	107,446,549	30,614,079	38	28%
146	LUBBOCK	20,507,787	5,742,303	127	28%
125	ALBANY,GA	38,934,892	10,772,888	93	28%



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Top 25 Total Local Ad Spend Markets: OOH Share Analysis



Total Local Ad Spend Rank	DMA MARKET	Total Local Ad Spend	OOH Local Ad Spend	OOH Ad Spend Rank	OOH Share of DMA Local Ad Spend
1	NEW YORK	\$3,489,726,777	\$809,578,499	1	23%
2	LOS ANGELES	\$2,653,715,379	\$593,269,702	2	22%
3	CHICAGO	\$1,694,952,334	\$240,778,086	3	14%
4	WASHINGTON,DC	\$1,139,215,790	\$101,729,465	14	9%
5	SAN FRANCISCO	\$1,136,184,680	\$210,367,799	4	19%
6	DALLAS	\$1,130,146,967	\$176,641,868	6	16%
7	PHILADELPHIA	\$1,125,044,069	\$128,131,561	9	11%
8	MIAMI	\$1,060,296,106	\$190,468,589	5	18%
9	HOUSTON	\$1,054,433,801	\$124,963,182	10	12%
10	BOSTON	\$1,007,384,806	\$114,820,147	11	11%
11	ATLANTA	\$979,113,528	\$175,842,061	7	18%
12	PHOENIX	\$824,372,946	\$104,091,882	13	13%
13	DETROIT	\$720,226,437	\$75,502,043	17	10%
14	TAMPA	\$659,997,356	\$100,124,732	15	15%
15	ORLANDO	\$653,920,112	\$144,789,736	8	22%
16	DENVER	\$608,990,411	\$62,782,319	19	10%
17	SEATTLE	\$591,560,659	\$51,227,729	22	9%
18	LAS VEGAS	\$581,834,011	\$108,543,392	12	19%
19	SAN DIEGO	\$542,747,439	\$67,708,874	18	12%
20	MINNEAPOLIS	\$532,129,995	\$77,992,430	16	15%
21	CLEVELAND	\$519,884,836	\$40,624,409	29	8%
22	ST LOUIS	\$414,910,436	\$45,282,629	25	11%
23	PITTSBURGH	\$407,775,615	\$39,168,723	32	10%
24	SACRAMENTO	\$399,635,861	\$57,238,637	20	14%
25	INDIANAPOLIS	\$383,813,881	\$27,523,781	41	7%





Total Local Ad Spend by Market by Media Channel



2022 Local Ad Spend by Market by Media Channel

																				Print Local Ad	1
Total Local				OOH Ad	% of		% of	Internet	% of	Mobile Web	% of	Mobile Web	% of	Online Video	% of	National Spot	% of	l	% of	Spend	% of
Ad Spend		Total Local Ad	OOH Local Ad	Spend	Market	Spot TV Local Ad	Market	Display Local	Market	Local Ad	Market	Video Local Ad	Market	Local Ad	Market	Radio Local Ad	Market	Radio Local Ad	Market	(Newspaper,	Market
Rank	DMA Market	Spend	Spend	Market Rank	Spend	Spend	Spend	Ad Spend	Spend	Spend	Spend	Spend	Spend	Spend	Spend	Spend	Spend	Spend	Spend	Magazine)	Spend
1	NEW YORK	3,489,726,777	809,578,499	1	23.2%	943,815,767	27.0%	103,724,020	3.0%	149,465,383	4.3%	128,509,320	3.7%	70,228,055	2.0%	129,309,301	3.7%	405,265,820	11.6%	749,830,612	21.5%
2	LOS ANGELES	2,653,715,379	593,269,702	2	22.4%	1,039,708,005	39.2%	43,545,748	1.6%	57,415,966	2.2%	42,806,112	1.6%	25,102,345	0.9%	122,384,166	4.6%	535,320,123	20.2%	194,163,211	7.3%
3	CHICAGO	1,694,952,334	240,778,086	3	14.2%	657,973,652	38.8%	30,872,155	1.8%	53,439,142	3.2%	43,875,749	2.6%	20,130,223	1.2%	81,810,683	4.8%	283,725,132	16.7%	282,547,512	2 16.7%
4	WASHINGTON,DC	1,139,215,790	101,729,465	14	8.9%	442,690,274	38.9%	56,801,350	5.0%	60,197,911	5.3%	33,788,087	3.0%	38,102,496	3.3%	56,347,238	4.9%	168,108,612	14.8%	181,450,356	15.9%
5	SAN FRANCISCO	1,136,184,680	210,387,799	4	18.5%	416,909,133	36.7%	21,855,463	1.9%	35,186,518	3.1%	44,448,565	3.9%	47,367,936	4.2%	56,883,927	5.0%	201,404,750	17.7%	101,760,590	9.0%
6	DALLAS	1,130,146,967	176,641,868	6	15.6%	469,785,890	41.6%	27,890,266	2.5%	39,811,997	3.5%	17,764,431	1.6%	8,734,875	0.8%	62,858,226	5.6%	230,159,796	20.4%	96,499,617	7 8.5%
7	PHILADELPHIA	1,125,044,069	128,131,561	9	11.4%	500,202,870	44.5%	33,203,512	3.0%	48,273,696	4.3%	45,471,872	4.0%	27,276,600	2.4%	61,527,380	5.5%	189,769,758	16.9%	91,186,819	9 8.1%
8	MIAMI	1,060,296,106	190,468,589	5	18.0%	478,927,016	45.2%	28,553,559	2.7%	27,811,697	2.6%	16,406,302	1.5%	10,234,130	1.0%	50,940,952	4.8%	142,798,337	13.5%	114,157,526	10.8%
9	HOUSTON	1,054,433,801	124,983,182	10	11.9%	408,059,768	38.7%	18,174,426	1.7%	28,707,669	2.7%	24,786,056	2.4%	21,182,142	2.0%	69,334,646	6.6%	241,603,067	22.9%	117,622,844	4 11.2%
10	BOSTON	1,007,384,806	114,820,147	11	11.4%	395,827,381	39.3%	67,258,356	6.7%	73,753,629	7.3%	40,884,372	4.1%	37,199,442	3.7%	42,685,841	4.2%	163,734,233	16.3%	71,221,404	7.1%
11	ATLANTA	979,113,528	175,842,081	7	18.0%	447,996,060	45.8%	10,911,973	1.1%	25,088,356	2.6%	36,147,533	3.7%	26,920,597	2.7%	60,388,164	6.2%	159,434,393	16.3%	36,384,392	2 3.7%
12	PHOENIX	824,372,946	104,091,882	13	12.6%	323,398,981	39.2%	22,925,985	2.8%	39,171,214	4.8%	41,652,944	5.1%	21,820,565	2.6%	52,061,881	6.3%	137,740,450	16.7%	81,509,043	9.9%
13	DETROIT	720,226,437	75,502,043	17	10.5%	293,520,375	40.8%	24,823,743	3.4%	29,283,923	4.1%	50,758,448	7.0%	46,888,564	6.5%	39,213,133	5.4%	131,642,723	18.3%	28,593,485	5 4.0%
14	TAMPA	659,997,356	100,124,732	15	15.2%	304,567,027	46.1%	20,507,549	3.1%	28,693,358	4.3%	28,675,037	4.3%	9,002,098	1.4%	26,601,416	4.0%	76,237,269	11.6%	65,588,869	9.9%
15	ORLANDO	653,920,112	144,789,736	8	22.1%	284,362,356	43.5%	17,673,669	2.7%	40,655,101	6.2%	17,727,908	2.7%	8,211,661	1.3%	29,890,464	4.6%	96,235,683	14.7%	14,373,537	7 2.2%
16	DENVER	608,990,411	62,782,319	19	10.3%	252,476,373	41.5%	14,223,039	2.3%	19,646,601	3.2%	23,908,692	3.9%	20,689,425	3.4%	37,993,001	6.2%	113,492,883	18.6%	63,778,077	7 10.5%
17	SEATTLE	591,560,659	51,227,729	22	8.7%	233,657,226	39.5%	61,359,966	10.4%	25,197,231	4.3%	24,206,164	4.1%	10,884,843	1.8%	25,208,358	4.3%	108,480,544	18.3%	51,338,598	8.7%
18	LAS VEGAS	581,834,011	108,543,392	12	18.7%	226,062,641	38.9%	36,283,314	6.2%	61,720,470	10.6%	9,658,191	1.7%	4,907,603	0.8%	20,045,035	3.4%	50,374,955	8.7%	64,238,411	11.0%
19	SAN DIEGO	542,747,439	67,708,874	18	12.5%	218,308,975	40.2%	18,376,250	3.4%	21,125,357	3.9%	8,278,507	1.5%	4,681,260	0.9%	31,156,866	5.7%	106,882,424	19.7%	66,228,926	8 12.2%
20	MINNEAPOLIS	532,129,995	77,992,430	16	14.7%	165,722,955	31.1%	20,534,829	3.9%	26,673,835	5.0%	23,559,194	4.4%	13,214,038	2.5%	26,171,605	4.9%	92,767,190	17.4%	85,493,920	0 16.1%

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2022 Product Industries Total Media Spend by Ad Medium



2022 Product Industries Total Ad Spend by Medium

			OOH % of	Total Digial Online/Mobile Spend	Digital Media % of							Total TV Spend (Network, Spot,	Total TV %
PRODUCT INDUSTRY	Total Category Ad Spend	OOH Ad Spend	Industry Spend	(Display, Video, Search, App)	Industry Spend	Internet Search Spend	Internet Display Spend	Online Video Spend	Mobile Web Spend	Mobile Web Video Spend	Mobile App Spend	Cable, Spanish, Syndiation)	of Industry Spend
Grand Total	199,452,683,600	6,139,473,101	3.1%	110,138,375,596	55.2%	62,357,904,316	11,999,071,549	5,599,431,897	8,892,946,030	12,819,075,888	8,469,945,915	64,965,225,034	32.6%
Retail	32,072,215,283	575,259,054	1.8%	25,557,624,976	79.7%	19,497,873,627	2,206,040,717	484,723,557	1,202,389,272	1,110,447,443	1,056,150,360	4,185,522,979	13.1%
Misc Services & Amusements	17,180,696,940	1,514,562,755	8.8%	7,634,638,041	44.4%	4,183,266,860	864,611,308	412,282,429	823,648,953	676,092,824	674,755,687	4,907,881,852	28.6%
Media & Advertising	16,649,371,064	544,115,255	3.3%	11,473,353,446	68.9%	5,005,384,782	1,623,918,979	658,248,214	1,228,618,254	1,815,679,987	1,141,503,229	3,653,071,159	21.9%
Insurance & Real Estate	11,532,194,485	328,459,169	2.8%	5,672,822,406	49.2%	3,394,664,980	396,573,340	296,450,779	346,652,492	695,259,774	543,221,041	4,632,401,091	40.2%
Financial	10,883,321,653	346,644,507	3.2%	6,522,479,114	59.9%	3,726,550,807	885,777,399	361,328,158	504,481,439	610,584,635	433,776,677	2,839,321,735	26.1%
Medicines & Proprietary Remedies	9,771,252,259	13,608,992	0.1%	2,320,402,243	23.7%	565,633,634	238,646,403	252,950,155	148,429,874	797,994,875	316,747,303	6,426,456,609	65.8%
Government, Politics & Organizations	9,200,933,182	419,748,516	4.6%	2,143,255,218	23.3%	1,035,487,235	336,106,073	100,993,613	309,946,416	190,032,955	170,688,927	5,641,285,130	61.3%
Public Transportation, Hotels & Resorts	9,053,303,783	400,421,148	4.4%	6,346,103,544	70.1%	4,445,032,472	448,865,135	252,694,670	302,500,824	639,014,280	257,996,163	1,540,828,857	17.0%
Automotive, Automotive Access & Equip	8,210,921,617	116,424,115	1.4%	2,842,062,129	34.6%	1,166,822,777	409,796,417	260,222,959	273,543,985	410,502,430	321,173,582	4,984,876,010	60.7%
Communications	7,559,735,757	156,627,409	2.1%	2,964,089,564	39.2%	972,175,202	439,567,676	227,193,336	343,492,877	591,080,938	390,579,535	3,816,121,025	50.5%

Access the full report <u>here</u>

2022 Total Media Spend by Product Industry by Month



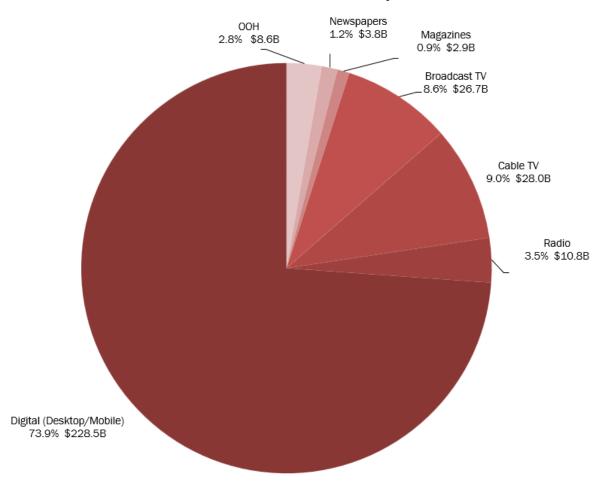
Product Industry	Total Ad Spend	January 2022 Ad Spend	Monthly % of Annual Product Industry Total	February 2022 Ad Spend	Monthly % of Annual Product Industry Total	March 2022 Ad Spend	Monthly % of Annual Product Industry Total	April 2022 Ad Spend	Monthly % of Annual Product Industry Total	May 2022 Ad Spend	Monthly % of Annual Product Industry Total	June 2022 Ad Spend	Monthly % of Annual Product Industry Total
Grand Total	199,483,247,570	16,622,871,434	8.3%	14,951,890,735	7.5%	15,519,637,141	7.8%	15,473,399,252	7.8%	15,996,964,024	8.0%	15,808,863,362	7.9%
Retail	32,073,985,196	2,646,747,147	8.3%	2,265,444,822	7.1%	2,242,097,871	7.0%	2,509,984,562	7.8%	2,559,855,480	8.0%	2,684,824,921	8.4%
Misc Services & Amusements	17,183,660,848	1,467,033,820	8.5%	1,323,252,484	7.7%	1,328,055,278		1,345,604,760	7.8%	1,388,286,207	8.1%	1,392,791,208	8.1%
Media & Advertising	16,650,261,482	1,462,690,688	8.8%	1,380,549,289	8.3%	1,350,876,840	8.1%	1,288,973,647	7.7%	1,334,355,775	8.0%	1,420,755,849	8.5%
Insurance & Real Estate	11,533,709,624	1,219,607,101	10.6%	929,373,526	8.1%	1,019,562,720	8.8%	969,092,805	8.4%	919,959,778	8.0%	779,161,783	6.8%
Financial	10,884,423,078	1,040,806,162	9.6%	949,198,461	8.7%	952,649,461	8.8%	878,651,470	8.1%	861,129,149	7.9%	802,969,611	7.4%
Medicines & Proprietary Remedies	9,772,474,271	778,379,544	8.0%	710,623,951	7.3%	785,045,213	8.0%	816,831,476	8.4%	811,838,556	8.3%	780,592,396	8.0%
Government, Politics & Organizations	9,211,650,932	432,237,700	4.7%	429,096,939	4.7%	502,933,084	5.5%	609,080,821	6.6%	742,310,185	8.1%	647,513,595	7.0%
Public Transportation, Hotels & Resorts	9,053,664,897	560,522,267	6.2%	660,378,954	7.3%	684,701,022	7.6%	720,868,723	8.0%	821,989,410	9.1%	846,100,099	9.3%
Automotive, Automotive Access & Equip	8,213,183,943	654,543,334	8.0%	634,000,509	7.7%	611,454,162	7.4%	553,735,945	6.7%	596,818,750	7.3%	596,376,861	7.3%
Communications	7,561,230,928	666,366,778	8.8%	632,143,050	8.4%	669,179,414	8.9%	539,688,317	7.1%	586,120,479	7.8%	525,891,807	7.0%

Access the full report <u>here</u>

OOH Share of Total Core Media



OOH Share of Overall US Media Spend - 2022



OOH outperformed all core media with the greatest spend increase in 2022 at +20.7% even surpassing digital media

Access the full report <u>here</u>

Source: MAGNA, OAAA