



# YEAR IN REVIEW



# FROM THE CHAIR'S DESK

PETER HORGAN, CEO, OMNICOM MEDIA GROUP & MFA CHAIR

Our industry is not alone in facing widespread disruption and rapid change. As programmatic technology, data empowerment and addressable media continue to rise in importance, so too media agencies are becoming more instrumental in marketers' business success.

But now is not the time to become complacent. As an industry, we must continue to get better and more effective at what we do, and ensure our clients understand the important role media agencies play in growing their business. The strength of the MFA lies in bringing the combined clout of its media agency members to tackle important issues that make us all better – from the advancement of our people to the improvement of the tools we use, and the greater goal of championing a dynamic and thriving media industry.

To fulfil this mission, we will remain focused on the three key MFA pillars: **Advancement of our People, Improved Processes and Performance.** This report outlines our achievements in all three of these areas, as well as other noteworthy 2018 highlights.



# FROM THE CEO'S DESK

SOPHIE MADDEN, CEO, MEDIA FEDERATION OF AUSTRALIA

Since its inception in 1997, the MFA has remained focused on making our people and our industry better at what we do. At a time of accelerated change and technological advancement, this is more important than ever. All our programs work towards this goal, with some outstanding achievements in 2018 that we can all be proud of.

Our newest People program MFA Digital Foundations, in only its second year has upskilled over 40% of our entire industry with the foundation digital knowledge necessary for us all. NGEN, our biggest and most established program, has achieved the impressive milestone of helping seven out of 10 people in our industry build their careers. Our MFA Tertiary program continues to attract talent, with 65% of new recruits in 2018 joining our industry as a direct result of this program.

This year, the MFA board united in its decision to shift our focus to media marketing effectiveness and advocacy of our clients' best interest. In doing so, made the bold decision to pause the MFA Awards to develop a bigger and better program for the future. We also saw the release of the AANA, IAB, MFA Australian Digital Advertising Practices, just one of many industry collaboration projects.

Looking ahead, we have a busy and exciting 2019 planned. Our effectiveness and client advocacy agenda will be driven by a focus on driving improved industry measurement and accountability and the return of the MFA awards. We will continue to prioritise attracting and retaining talent, building on the success of our existing programs and trialing some new initiatives. As we face the challenges of tomorrow, our vision to be a force that makes the media industry better at what we do for clients will propel us towards continued sustainable growth and support for our industry.



## ABOUT THE MFA

The MFA is an alliance of Australian media agencies who represent the common interest of our industry and our clients.

Established in 1997, we are the peak body representing media communication agencies to government, industry, media owners and the general public.

## OUR PURPOSE

We exist to champion a dynamic and thriving media industry.

## OUR VISION

To be a FORCE that makes the media industry better at what we do for clients':

- *Mastery in media agencies.*
- *Improvement of the tools we use.*
- *Advancement of our people.*
- *Growth of our clients' businesses.*

We represent the common interests of our industry in three areas:



## IN NUMBERS



3,432

PEOPLE IN  
OUR INDUSTRY



97%

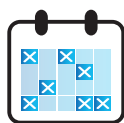
EAST COAST BASED:  
SYDNEY, MELBOURNE, BRISBANE



MFA MEMBERS REPRESENT

>90%

MEDIA ADVERTISING BILLINGS



120

EVENTS

7004  
5

7,005

ATTENDEES



27,900

HOURS OF  
TRAINING

# PEOPLE



*"Working with the MFA has been a clear reminder that the people priorities across the industry are also key focuses for us at individual agency and group levels. There is always a lot to be done to make the industry a more visible drawcard for talent. Initiatives have included a new NGEN Career Skills Journey Guide for 2019; attention to different talent pools such as Talent Rise; a Media I survey on "Defining Job Satisfaction"; as well as working with The Communications Council on lobbying for more available Skilled Visas."*

**Lisa Gray, Head of Talent, Human Resources, IPG Mediabrands**

## ATTRACTING TALENT: MFA TERTIARY

65% of this year's new media agency recruits discovered and experienced our industry through the MFA Tertiary program. We engaged with tertiary students and lecturers at fifteen universities across Australia offering strong marketing, communications and business degrees, through: Career Days conducted at member agencies, guest lectures and student visits, as well as training lecturers to ensure they have access to the most up-to-date industry information.



*"Western Sydney University's long-standing association with the MFA has been invaluable. The annual 'Lecture the Lecturers' day provides our teaching staff with the opportunity to connect with a remarkably diverse line-up of media executives, and gain up-to-date information and insights into campaigns and challenges. We love it!*

*Our learnings are directly incorporated into what we teach the students, and we also support this material with the MFA Educational Guidelines. End result – students benefit from course content that is relevant, engaging, practice-based and accredited by the MFA.*

*The industry guest speakers organised by the MFA have truly excited and inspired our students to seek out careers in media. The excursions to media agencies in the CBD are always a highlight of the semester, and have opened the students' eyes to the variety of roles in the industry. They also provide students with the unique opportunity to network with speakers for advice and internships.*

*The MFA has helped WSU develop work-ready grads, who are excited about the potential of a career in media."*

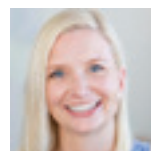
**Jacki Montgomery, Lecturer, Advertising & Media, Western Sydney University**



## SUPER-CHARGING CAREERS: NGEN



For over 10 years NGEN has empowered and inspired our newest talent and helped them build successful careers. It can now boast to helping build the careers of seven in ten people working in our industry. NGEN is our biggest and most established program, providing valuable training and development for young media professionals and connecting them to a network of their peers, kickstarting relationships that will endure throughout their careers.



*"NGEN provides invaluable training and networking opportunities for the future leaders of our industry. From inspirational, thought-provoking sessions from industry leaders to core skills training, our sessions empower people starting in the industry to make the most out of their career."*

*NGEN also provides a supportive environment, where young media professionals can discuss concerns, share experiences and help each other in navigating the industry."*

**Lucy Foot, Senior Executive, Implementation, Planning & Investment, MediaCom**

## IN NUMBERS



600

UNIVERSITY STUDENTS ENGAGED



60

INTERNS PLACED



+90%

INTERNS OFFERED FULL TIME EMPLOYMENT



350

GRADUATES RECRUITED



3,000

NGENers

INSPIRING OUR FUTURE LEADERS:  
MFA 5+



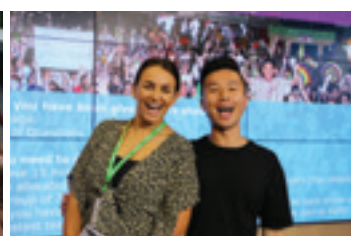
*"The role of MFA 5+ is to inspire media executives who've been in the industry for five-plus years, with a focus on soft and hard skills, business acumen and what makes a great leader. It's these people who are managing clients and overseeing younger team members, so ensuring they remain engaged and enthusiastic has a huge impact on the quality of work and overall delivery for clients. By helping them become better leaders, we are safeguarding the future of our industry."*

**Steven Burt, Senior Client Director, UM Worldwide & MFA 5+ Sydney Chair**

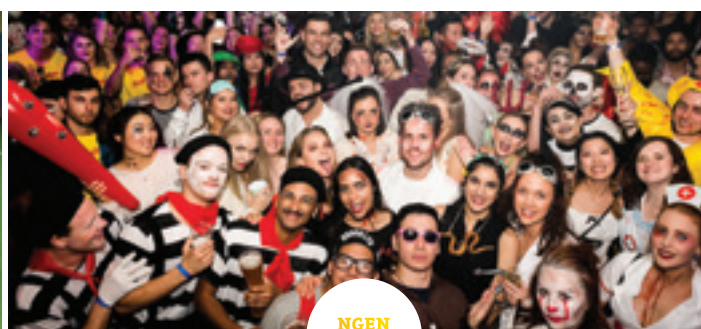
More than 1,000 media agency professionals (about one third of the industry) took time out to develop their leadership skills and commercial acumen at MFA 5+ events in 2018. Tailored to media professionals with 5+ years industry experience, the MFA 5+ program's 'Inspiration Series' events are designed to take these busy professionals out of their hectic day-to-day routine and challenge them to think differently. Speakers from within and outside the industry (such as a fireman who discussed leading under pressure), as well as industry leader mentors who dedicate time to members of the MFA 5+ community, make this a unique and effective program.



**NGEN Sessions**



**NGEN Charity Cup**



**NGEN Halloween**



# PROCESS



*"The media industry is constantly scrutinised and critiqued around issues such as transparency as the complexities for clients, media-owners and agencies accelerate. This includes a rapidly evolving supplier base with new and evolving measurement systems. In this environment, we need a strong and active MFA to represent media agencies in discussions such as establishing the common currencies our clients need to harness the industry's capabilities."*

**Melissa Fein, CEO, Initiative & MFA board member**

## INCREASING PRODUCTIVITY THROUGH AUTOMATION AND INTEGRATION: **MFA SYSTEMS**

The aim of MFA Systems is to promote increased productivity via the automation and integration of media systems across the industry and provide a forum for media and software suppliers to engage with MFA member media agencies.

VICTOR CORONES, MANAGING DIRECTOR, MAGNA & CHAIR, MFA SYSTEMS COMMITTEE



We have a passionate and collaborative team who are committed to finding agency and systems solutions that work across all agencies. As a group, we continue to cover an ever-expanding range of industry developments as media owners evolve their own sales and trading models.

### **We ticked off a number of achievements this year, including:**

- 9Galaxy roll-out and enhancements with Nine Entertainment Co, MCN's FTA Dynamic system roll-out, Code7 system launch with Seven Network, and Think TV portal development underway.
- Trial and launch of Radio holdings with Commercial Radio Australia, and currently developing automated trading solution.

- Automating how we trade OOH and preparing for Q1 rollout trial of CORE with the Outdoor Media Association.
- BOP automated print trading, now ready for roll-out.
- Integration of GfK radio survey data, ongoing development and future roadmapping.

### **In 2019 we expect to see:**

- Dynamic TV to remain a key focus with media owners as the MFA continues to work with Mediaocean in this space.
- Addressable TV will also be a focal point as we start to better understand how it will work and how it impacts agencies' current systems and processes.
- Greater collaboration with the OMA on Digital Measurement in OOH and the sector's new transaction platform.
- Additional collaboration with Commercial Radio Australia and Audionet on proposal development requirements.



*"ThinkTV applauds the work and the support provided by the MFA generally, and the Systems Committee members specifically, over the course of the past year. Always open and ready to provide constructive feedback, the team at the MFA literally define the word partnership for us. They work tirelessly on behalf of media agencies to ensure the innovation, integration and technology solutions being developed will make TV easier to trade. Moreover, the feedback provided ensures that any change brought to market by broadcasters will be relevant, useful and valued by member agencies and their clients."*

**Kim Portrate, CEO, ThinkTV Australia**

## DRIVING EFFECTIVE INDUSTRY MEASUREMENT: **MFA RESEARCH**

John Grono continues to lead our work in the area of research, ensuring industry data is of the best possible quality and meets our clients' current and future needs.

This year's focus included digital, TV and radio measurement, participation in all industry technical groups and addressing measurement issues as they arise. The increased focus on measurement and accountability in 2019 will see a refreshed approach to the MFA Research group.

## IN NUMBERS



93

WORKSHOPS AND EXAMS



1,400

PEOPLE UPSKILLED THROUGH MFA DIGITAL FOUNDATIONS PROGRAM



84%

OF EXAMINEES ACHIEVED MFA CERTIFICATION

## BUILDING INTERACTIVE ADVERTISING EFFICIENCY AND EFFECTIVENESS: MFA INTERACTIVE

The purpose of the Interactive group is to build the efficiency and effectiveness of interactive advertising, with a focus on developing and educating best practice within the industry and safeguarding the interests of agencies and their clients.

STUART BAILEY, CHIEF DIGITAL OFFICER, PHD  
& CHAIR, MFA INTERACTIVE COMMITTEE



The MFA is leading the charge on education and accountability. The work that has been done on the Digital Foundations Program is nothing short of amazing, with two certificates rolled out and over 1,400 people participating.

The Digital Foundations Program has been instrumental in providing a consistent digital education across the MFA membership base and is a great step to safeguarding and future proofing the industry we work in.

From an accountability point of view, the launch in July of the Australian Digital Advertising Practices was the culmination of two years' collaboration by the MFA, IAB and AANA, and provides guidance for advertisers, agencies, publishers and tech vendors around the key issues of digital transparency, viewability, brand safety, ad fraud and data transparency. In its first week, the Practices recorded 700+ downloads.

Both of these initiatives could not have been done without the fantastic work done by Sophie and her team and the volunteers across the MFA agencies, who have put aside egos and politics to make a real difference to the industry we work in.

Personally, I am proud to have had a small part in this and to be working with such a talented and inspirational team. I'm looking forward to what 2019 will bring.



500+

INDIVIDUALS VOLUNTEERING  
THEIR TIME TO MFA PROGRAMS



700

DOWNLOADS OF THE AUSTRALIAN  
DIGITAL ADVERTISING PRACTICES



10

INDUSTRY SYSTEM  
DEVELOPMENT PROJECTS

# PERFORMANCE



*"The MFA's role first and foremost is to help our clients deliver better results with more accountability. The MFA should steward the industry and its future, uphold the reputation of media agencies and reassure the broader market of the positive and vital contribution media agencies play in growing brands and businesses. A healthy and robust media industry and media agency market is essential, as is a representative organisation committed to improving the broader industry for all participants. For me and GroupM, being part of that process is essential to a thriving industry."*

**Mark Lollback, CEO, GroupM Australia & New Zealand & MFA board member**



## RECOGNISING AND REWARDING WORK THAT WORKS: MFA AWARDS

The MFA Awards program will return in October 2019 with a renewed focus on effectiveness, as a key part of the MFA's commitment to demonstrating media agencies' contribution to achieving tangible, long-lasting results for clients.

The revamped MFA Awards incorporate feedback from over 800 individuals across media agencies, media owners and advertisers – making the MFA awards a true industry awards program, designed by the people whose work we are celebrating.



## JOE LUNN, CHIEF STRATEGY OFFICER, MINDSHARE & CHAIR, AWARDS COMMITTEE



For the past two decades, the MFA Awards have been celebrating the most creative, effective media thinking in Australia. In today's landscape, however, with the speed and scale of disruption accelerating, there's a need for the Awards to give our industry a voice and provide even greater value to our clients, partners and people. It's why we're so excited to be using this reset moment to create an entirely new Awards program and event, with a renewed emphasis on effectiveness and client advocacy.

From an Awards perspective, we'll be focusing on business outcomes in our categories and criteria; overhauling judging to maximise transparency and rigour; and streamlining entries to reward only the very best. The event itself will become a showcase of the work, providing the learnings and leadership required to ensure our clients continue to benefit from global best-practice work.

Thank you to the hundreds of people that have participated in the consultation process Australia-wide. I look forward to sharing and celebrating the work with you all in 2019.



## A SNAPSHOT OF OUR INDUSTRY: THE MFA INDUSTRY CENSUS

### Closing the Gender Equality Gap

Our industry significantly outperforms the Australian average.

- **63%** female workforce.
- **6%** gender pay gap.
- **42%** of senior management positions filled by women.



### Growing Agency Tenure and Experience

- **3.1 years** vs the Australian average tenure norm of 3 years.
- **31.2 years old** - average age of media agency employees.
- **7.9 years** industry experience.



THE 2018 MEDIA INDUSTRY CENSUS REVEALS A CANDIDATE-SHORT MARKET WITH DIGITAL AND TECH ROLES ON THE RISE AND FOR THE FIRST TIME, FLAT POPULATION GROWTH.



### In Demand

- Vacancy rate of **9%** (almost one in ten roles are unfilled).
- Tech and digital candidates are the most in demand.
- **5%** increase in the number of digital roles and **58%** increase in trading desk roles.

### Reduced Staff Turnover

Staff turnover has improved, with people leaving the industry dropping from **19%** to **12%**. Reasons include travel, lifestyle, career change, study or retirement.

## MEASURING INDUSTRY AND BUSINESS HEALTH: MFA BUSINESS INTELLIGENCE

The MFA's work in gathering business intelligence aims to help our members measure the industry and their business health. We do this through a number of annual and ad hoc reports and surveys.



"The MFA's work in surveying media agencies through the Salary, Census and Cost Benchmark surveys is important in documenting insightful and informative data and trends, specific to our industry. The surveys enable member agencies of all sizes to benchmark their results against the industry averages, elevating the community as a whole. Member agency CFOs play an important role in routinely refining and updating the surveys' methodology, resulting in constantly improved insights."

**Vince Meoli, Commercial Director, Hyland & Chair, MFA Finance**

### ANNUAL REPORTS AND SURVEYS

INDUSTRY CENSUS	SALARY SURVEY	AGENCY COST BENCHMARK	AGENCY OVERHEAD REPORT
<b>Data Collection</b>			
October	October	February	February
<b>Distribution</b>			
January	January*	April*	April*

\*Reports available to participating members only.

### IN NUMBERS



8

INDUSTRY REPORTS AND SURVEYS



5

GOVERNMENT SUBMISSIONS



8

CROSS-INDUSTRY COLLABORATION PROJECTS

# OUR MEMBERS



*"We have an obligation to shape the industry we work in, not just work in the industry. If we all subscribe to the notion – and I certainly do – that real achievement is leaving something in a better state than you found it, then what better way is there to do that than being an active member of our industry body?"*

**Mark Coad, CEO, PHD Australia & MFA board member**



## IN NUMBERS



3

NEW MEMBERS  
WELCOMED IN 2018



84%

GLOBAL MEDIA AGENCIES  
(MFA MEMBERSHIP)



16%

LOCAL MEDIA AGENCIES  
(MFA MEMBERSHIP)

## OUR SUPPORTERS



## MFA TEAM



**Sophie Madden**  
CEO



**Cathy Atkin**  
Accountant



**Kathleen Beddoes**  
Head of  
NGEN



**Tahni Brooks**  
Event  
Coordinator



**Sophie Hooper**  
Operations  
Manager



**Elizabeth Hughes**  
Administration  
Executive



**Linda Wong**  
Director,  
People

Our work would not be possible without a committed and active membership. Thank you to all our member agencies, our board and committee volunteers, who generously offer hundreds of hours from their already busy schedules to improve and champion our industry. A huge thanks also to the hard-working MFA team.

## MFA BOARD



**Peter Horgan**  
(Chairman) **OMG**



**Toby Barbour**  
**Starcom**



**Danny Bass**  
**Mediabrand**s



**Megan Brownlow**  
**PwC**



**Mark Coad**  
**PHD**



**Brett Dawson**  
**Bohemia**



**Melissa Fein**  
**Initiative**



**Virginia Hyland**  
**Hyland**



**Matt James**  
**Publicis Media**



**Mark Lollback**  
**GroupM**



**Sophie Madden**  
**MFA**



**Katie Rigg-Smith**  
**Mindshare**



## MFA COMMITTEE CHAIRS



**NGEN MELBOURNE**  
**Liz Astin**  
**OMD**



**INTERACTIVE**  
**Stuart Bailey**  
**PHD**



**MFA 5+ MELBOURNE**  
**Imogen Bourke**  
**Starcom**



**MFA 5+ SYDNEY**  
**Steven Burt**  
**UM**



**SYSTEMS**  
**Victor Coronas**  
**Magna**



**NGEN MELBOURNE**  
**Julia Eppingstall**  
**News Corp**



**MFA 5+ MELBOURNE**  
**Ashley Gilbert**  
**OMD**



**RESEARCH**  
**John Grono**  
**Gap Research**



**MFA BOARD**  
**Peter Horgan**  
**OMG**



**AWARDS**  
**Joe Lunn**  
**Mindshare**



**NGEN SYDNEY**  
**Raymond Ly**  
**Mindshare**



**NGEN BRISBANE**  
**Duncan Male**  
**News Corp**



**FINANCE**  
**Vince Meoli**  
**Hyland**



**NGEN SYDNEY**  
**Sarah McRitchie**  
**oOh! Media**



**NGEN BRISBANE**  
**Georgia Rutledge**  
**OMD**

