# 2024 Distracted Driving Prevention Enforcement Campaign

Media Work Plan

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# 1.0 Executive Summary

The National Highway Traffic Safety Administration's (NHTSA) 2024 Distracted Driving Prevention high-visibility enforcement (HVE) campaign supports a national distracted driving law enforcement mobilization during April. This document provides an overview of the research and trends that inform NHTSA's national paid media plan for the 2024 Distraction campaign.

Most drivers distracted by cell phones in fatal crashes are 18 to 34 years old, making them the primary target for this campaign. The demographic comprises two distinct generations—Gen Z, 18 to 27 years old, and Millennials, 28 to 34 years old, in 2024. The campaign aims to inform drivers that the dangerous act of using a phone while driving is a law-enforceable offense.

National paid advertising will run for eight days, beginning Monday, April 1, 2024, through Monday, April 8, 2024, and is supported by a $5 million paid media budget. Given the short flight length, it's essential to establish broad reach and frequency quickly to drive message penetration. Media selection is based on the target audience's media usage patterns reported by MRI-Simmons and considers strategies based on current research and past campaign performance.

As we observe the current media environment and target audience usage, we see a shift in time spent and consumers using multiple channels to view content. NHTSA plans to activate an omnichannel paid media strategy of video, audio, out-of-home (OOH), digital display and paid social media to reach the target audience three to five times across all channels throughout the campaign. By lowering the frequency from 2023, NHTSA will reach a broader audience while maintaining the penetration of the message to the target audience.

Using consistent creative assets across tactics helps build brand awareness. With many channels available to reach the target audience, it is crucial to recognize that success lies not only in diversification, but also in striking the right balance between consistency and quantity. The 2024 campaign is designed to provide the broadest reach while not sacrificing brand awareness efforts.

The plan relies heavily on digital tactics as nearly 100% of the target audience is connected to the internet. Streaming continues to command more viewer time, with Nielsen reporting increases by about 10% from December 2022 to January 2023, with continuing increases through 2024. MRI also shows that over 20% of the target audience is more likely to be found on a streaming service than on linear (traditional) TV.

Given the shift of the target audience to streaming services combined with the one-week flight of the campaign, the linear (traditional) TV budget will be allocated toward streaming. This allows connected TV (CTV) and over-the-top (OTT) to reach the target audience where they are most likely to be watching during the flight. CTV vendors can make real-time optimizations to ensure complete delivery within a short timeframe.

Audio is another dominant consumption channel and will be a vital campaign component. Terrestrial radio continues to provide wide reach within both 2024 Distraction generations, with significant added value. Additionally, digital audio will be considered to reach the audience who listens outside the terrestrial format, including inside their cars while driving.

OOH options will be explored to extend the reach of the 2024 Distraction messaging outside of the personal screens of the target audience. Moving into 2024, NHTSA will focus on finding a balance of partners that can reach the entire audience as well as Gen Z and Millennials separately, given their differing affinities and interests.

Digital display will explore custom content via direct publisher partners, programmatic video and display to integrate within the target audience's digital journey and be a part of their "communities" to encourage engagement with the messaging. Tactics such as publisher direct and gaming will require a larger portion of the budget to allow for custom activations integrating the campaign message directly into the vendor's content.

Finally, paid social media continues to be one of the most significant driving forces behind the target audience's internet usage. The plan will continue to explore opportunities to engage and connect with the target audience across multiple approved platforms to deliver the campaign message.

Campaign materials are available at TrafficSafetyMarketing.gov. State departments of transportation (SDOTs) and state highway safety offices (SHSOs) may wish to reference this paid media strategy and subsequent media buy details to develop their media plans during the HVE period or adapt tactics and approaches for their campaigns.

# 2.0 Campaign at a Glance

## 2.1 Media Strategy and Goals

The 2024 Distraction campaign aims to curb the dangerous behavior of using a phone while driving by communicating to 18- to 34-year-old adults that distracted driving laws are being enforced nationwide.

With a campaign window of only eight days, the primary media strategy is to use terrestrial radio, digital formats, paid social media and streaming television. A move toward CTV from linear (traditional) TV for this campaign will ensure delivery to the target during the short flight. The campaign will quickly build frequency and reach the target audience three to five times throughout the campaign, while balancing continued interest and engagement with message penetration.

### 2.1.1 Planned Campaign Assets

**Figure 1: Planned Campaign Assets**

| Language | Asset Title | Type/Lengths | Additional Assets |
|---|---|---|---|
| English | Phone Personalities | TV/Video (:30s, :15s and :06s) | Web banners (available in standard sizes) |
| | | Radio/Audio (:30s audio spot and live reads copy :05, :10, :15, :30 and :60) | |
| Spanish | Meme del Gato Portavoz | TV/Video (:30s, :15s and :06s) | |
| | | Radio/Audio (:30s audio spot and live reads copy :05, :10, :15, :30 and :60) | |

### 2.1.2 Advertising Period

National paid advertising will start Monday, April 1, 2024, and run through Monday, April 8, 2024.

### 2.1.3 Working Media Budget

The total budget for the 2024 Distraction campaign is $5 million.

### 2.1.4 Target Audience

The primary target audience is 18- to 34-year-old adults. The secondary target audience is 18- to 34-year-old Hispanic adults who primarily speak and consume Spanish media at home.

In 2024, the target audience for the campaign is split between Millennials (those born between 1990–1996) and Gen Z (those born between 1997–2006). Based on this split, 50% of the plan’s budget focuses on approaches that speak to both audiences, such as sports entertainment. The remaining budget will be allocated based on each generation’s differing media consumption habits to address differences in the two age groups and connect directly with each audience.

# 3.0 Campaign Audience Trends

Adults under the age of 35 years old are overrepresented in distraction-affected fatal crashes[1]—47% of distracted drivers involved in fatalities in 2021 fell into this age group. The Distracted Driving campaign seeks to reach and influence these drivers through an omnichannel paid media campaign.

Tracking overall trends in media consumption and the shared interests, passions and affinity groups within the target market strongly inform the tactics selected. We aim to increase engagement and impact by connecting campaign activation to audience interests.

## 3.1 Audience Affinities and Passion Points

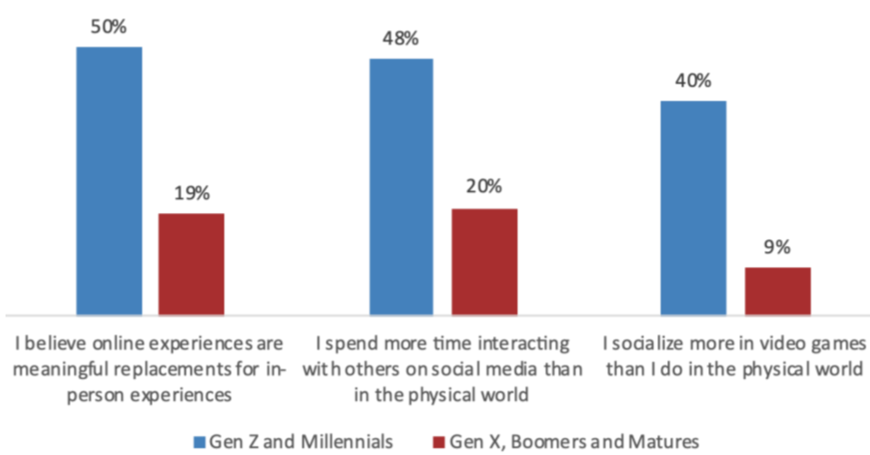
While fatality data defines the age-segment focus, high-reach touch points connect our message with the audience. These affinity areas give context to the placements and integrations that will most likely reach the target with NHTSA's message.

Among 18- to 34-year-olds, three areas emerge as key passion points for campaign engagement: online experiences and gaming, sports, and music and film. Each area reaches the overall age segment differently, providing strong platforms to connect safety messaging with the audience.

### 3.1.1 Online Experiences and Gaming

Younger adults generally engage with technology and social media more than older generations, and online experiences play a significant role in the target audience's lives. Almost half of Gen Z and Millennials in the United States say they spend more time socializing with others on social media than in the physical world, and 40% agree that they socialize more in video games than in the physical world (Figure 2). To many in this audience, the online world is their real world, and the bonds formed in gaming are as powerful as those created through in-person interactions.

**Figure 2: For Gen Z and Millennials, Online Experiences Are a Meaningful Part of Their Lives**

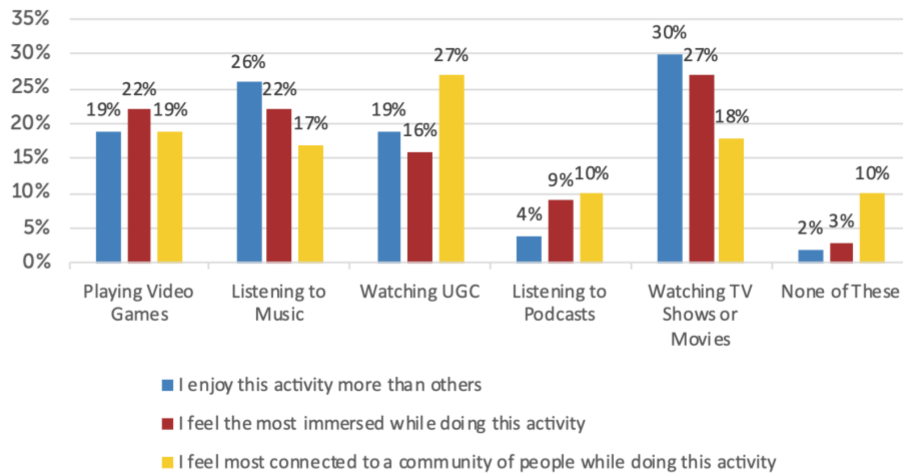



*Source: Deloitte Insights, April 2023*

[1] https://crashstats.nhtsa.dot.gov/Api/Public/ViewPublication/813443

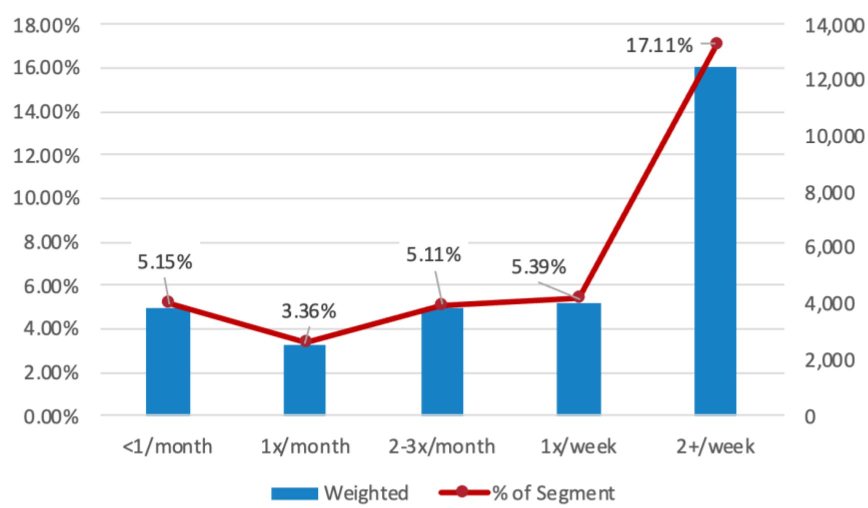
This trend underscores the importance of connecting with the audience via online experiences to reach them where they spend time. The target audience for the campaign is consuming a wide range of digital content and participating in online experiences that are both real-time (gaming and streaming live content) and time-shifted (listening to podcasts or watching pre-recorded shows and user-generated content) (Figure 3).

**Figure 3: Appeal of Digital Entertainment Activities Among Gen Z and Millennials**




*Source: Marketing Charts, April 2023*

**Figure 4: Video Game Use by 18- to 34-Year-Olds**



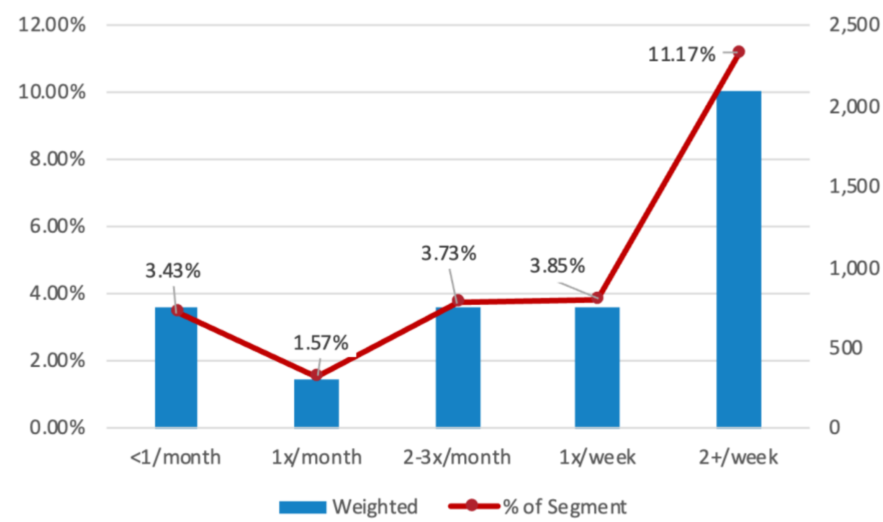

*Source: 2023 MRI-Simmons Spring Doublebase USA*

The target audience shows a heavy interest in video games, with more than 17% of 18- to 34-year-olds engaging with gaming multiple times weekly (Figure 4). Data shows that 59% of men and 41% of women in the 18- to 34-year-old demographic play video games. To activate this passion point, the 2024 Distraction campaign will explore the activation of gaming influencers, gaming streaming and large gaming events, aligning messaging with content that directly hits the audiences' interests.

*Note: All gaming content considered for NHTSA's campaign will have high standards of brand safety, ensuring that no games with explicit violence, shooting and fighting are included.*

The Hispanic secondary audience for the campaign demonstrates similar patterns in online usage and video gaming. As a segment of the overall 18- to 34-year-old general market audience, this trend consistency is expected. However, the overall reach is somewhat lower, with nearly 15% engaging in gaming one or more times per week (Figure 5).

**Figure 5: Frequency of Gaming Activity Among 18- to 34-Year-Old Adults of Spanish or Hispanic Origin**




*Source: 2023 Summer MRI-Simmons USA*

### 3.1.2 Sports

Few areas of interest connect people as powerfully as sports. The appeal lies in the visceral connection that individuals feel toward their favorite teams and athletes. Fandom offers shared experiences, fostering a collective bond and sense of belonging among otherwise disparate individuals. The unscripted, adrenaline-producing nature of athletic competition, coupled with the drama of victory and defeat, produces strong emotional ties. Passions for sports can run so deep that they form part of an individual's identity—"I'm a {blank} fan" becomes part of who they are.

There is a diversified interest in sports across the target audience (Figure 6). Both college and NFL football command the most significant viewership, but will not be in season during the campaign flight. However, April offers sports activation opportunities around baseball, basketball, soccer and hockey, each reaching more than 7% of the target market. High-growth sports viewing that indexes above 125 for the target audience can also be explored, including UFC, WWE and esports opportunities.

**Figure 6: Selected Sports Watched on TV by 18- to 34-Year-Olds**

| | 18- to 34-Year-Olds (All) | | | 18- to 34-Year-Olds (Hispanic) | | | 18- to 34-Year-Olds (Black/African American) | | |
|---|---|---|---|---|---|---|---|---|---|
| | Weighted Pop. (000) | % of Target | Index | Weighted Pop. (000) | % of Target | Index | Weighted Pop. (000) | % of Target | Index |
| **Study Universe** | ***74,651*** | ***100%*** | ***100*** | ***18,728*** | ***100%*** | ***100*** | ***12,172*** | ***100%*** | ***100*** |
| **Auto Racing–Other** | 3,105 | 4.16% | 86 | 905 | 4.83% | 100 | 442 | 3.63% | 75 |
| **Auto Racing–NASCAR** | 3,800 | 5.09% | 62 | 956 | 5.10% | 62 | 566 | 4.65% | 57 |
| **Baseball–MLB Regular Season** | 11,336 | 15.19% | 77 | 2,971 | 15.86% | 81 | 1,217 | 10.00% | 51 |
| **Basketball–NBA Regular Season** | 11,602 | 15.54% | 110 | 2,886 | 15.41% | 109 | 2,987 | 24.54% | 174 |
| **Basketball–NCAA Basketball Tournament** | 7,588 | 10.16% | 79 | 1,157 | 6.18% | 48 | 1,633 | 13.42% | 104 |
| **Boxing** | 5,386 | 7.21% | 116 | 2,316 | 12.37% | 199 | 1,266 | 10.40% | 168 |
| **Esports (Video Game Tournament)** | 2,689 | 3.60% | 202 | 612 | 3.27% | 184 | 474 | 3.89% | 219 |
| **Extreme Sports–Summer** | 1,914 | 2.56% | 130 | 446 | 2.38% | 120 | 387 | 3.18% | 161 |
| **Extreme Sports–Winter** | 2,026 | 2.71% | 119 | 494 | 2.64% | 115 | 331 | 2.72% | 119 |
| **Football–College Regular Season** | 14,049 | 18.82% | 76 | 1,617 | 8.63% | 35 | 2,230 | 18.32% | 74 |
| **Football–NFL Monday, Thursday or Sunday Night Games** | 19,693 | 26.38% | 81 | 3,662 | 19.55% | 60 | 3,346 | 27.49% | 85 |
| **Football–NFL Weekend Games (Day)** | 18,935 | 25.36% | 83 | 3,536 | 18.88% | 62 | 3,026 | 24.86% | 82 |
| **Ice Hockey–NHL Regular Season** | 5,409 | 7.25% | 91 | 800 | 4.27% | 54 | 434 | 3.57% | 45 |
| **Lacrosse** | 1,154 | 1.55% | 120 | 296 | 1.58% | 123 | 189 | 1.55% | 121 |
| **Soccer–MLS** | 3,933 | 5.27% | 110 | 1,433 | 7.65% | 159 | 499 | 4.10% | 85 |
| **Soccer–U.S. Men's National Team** | 3,329 | 4.46% | 102 | 1,206 | 6.44% | 148 | 569 | 4.67% | 107 |
| **Soccer–U.S. Women's National Team** | 2,691 | 3.60% | 98 | 879 | 4.69% | 127 | 447 | 3.67% | 100 |
| **Soccer–International** | 5,252 | 7.04% | 116 | 2,427 | 12.96% | 214 | 660 | 5.42% | 90 |
| **Ultimate Fighting Championship (UFC)** | 4,134 | 5.54% | 125 | 1,163 | 6.21% | 140 | 707 | 5.81% | 131 |
| **Volleyball–Professional Beach** | 1,674 | 2.24% | 104 | 488 | 2.61% | 121 | 340 | 2.79% | 129 |
| **Wrestling–WWE** | 4,177 | 5.60% | 132 | 1,382 | 7.38% | 175 | 970 | 7.97% | 189 |

*Source: 2023 MRI-Simmons Spring Doublebase USA*

There are nuances in the concentration and audience reach of individual sports, e.g., Black/African American audiences heavily view NBA basketball, while international soccer attracts a large Hispanic market. For both general and secondary audience groups, the overall strength of the sports context remains high.

### 3.1.3 Pop Culture (Music and Film)

In addition to the online/gaming and sports environments, the 18- to 34-year-old segment is also full of passionate music and film fans. Pop culture, shaped by trends emerging from the music, film and fashion industries, is a powerful force that has the ability to shape beliefs and attitudes.

More than 40% of the general market and nearly half of the Hispanic target audience saw a film in a movie theater in the past six months (Figure 7). This rebound in movie attendance to an estimated 30.4 million members of the target audience is a significant reversal from spring 2021, when theater attendee estimates among the same group dipped to just 13.2 million. This 130% surge back to theaters demonstrates the excitement that films generate among fans, who spent more than $3.5 billion at the domestic box office on the top 10 grossing films of 2023 alone.[2] While changes to the moviegoing experience—notably the addition of reserved seating, which reduces the need for pre-show dwell time—may impact direct in-theater placements, the opportunities to activate messaging alongside these highly anticipated and engaged fan conversations should be thoroughly explored.

[2] https://en.wikipedia.org/wiki/List_of_2023_box_office_number-one_films_in_the_United_States

Beyond the silver screen, more than two-thirds of the general market target also agree that "binge-watching is a great way to watch a series," and more than half regularly talk with friends about what they're watching. As viewers consume ever-increasing amounts of media in all forms (see Section 4.0 Media Channel Trends), passionate communities of fans continue to emerge.

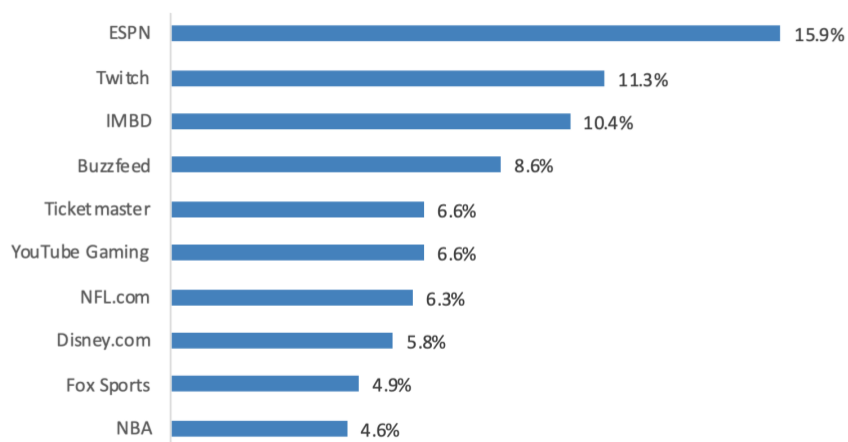
**Figure 7: Audience Leisure Activity Participation**

| | 18- to 34-Year-Olds (All) | | | 18- to 34-Year-Olds (Hispanic) | | |
|---|---|---|---|---|---|---|
| | Weighted Pop. (000) | % of Target | Index | Weighted Pop. (000) | % of Target | Index |
| ***Study Universe*** | ***74,338*** | ***100.00%*** | ***100*** | ***19,344*** | ***100.00%*** | ***100*** |
| **Movies/Film** | | | | | | |
| **Viewed movie at a theater in past six months** | 30,432 | 40.94% | 114 | 9,200 | 47.56% | 132 |
| **Music/Concerts** | | | | | | |
| Attended concert or music festival in past 12 months | 21,387 | 28.77% | 107 | 5,182 | 26.79% | 99 |
| **Listened to music in past month** | 34,330 | 46.18% | 96 | 6,948 | 35.92% | 75 |
| **Television/Episodic Series** | | | | | | |
| **I use social media to talk about shows I like** | 18,891 | 25.41% | 154 | 5,314 | 27.47% | 166 |
| **Agree that binge-watching is a great way to watch a series** | 50,156 | 67.47% | 105 | 11,781 | 60.90% | 95 |
| **Agree that "I often talk about TV shows with my friends"** | 39,966 | 53.76% | 119 | 10,237 | 52.92% | 118 |
| **Agree that "I like watching shows that everyone is talking about"** | 35,603 | 47.89% | 119 | 8,848 | 45.74% | 114 |

*Source: 2023 Summer MRI-Simmons USA*

All three of these trends are reflected in the top-selected websites for the age bracket (Figure 8). Gaming (Twitch/YouTube Gaming), sports (ESPN, NFL.com, Fox Sports, NBA.com) and music and film (IMDB, Ticketmaster, Disney.com) websites dominate the top spots.

**Figure 8: Top 10 Websites for 18- to 34-Year-Old Adults**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

During the 2023 Distraction campaign, partners in these categories delivered millions of video completions, including an impressive 61.03% video completion rate by Buzzfeed and more than 2 million impressions from ESPN and CBS Interactive focused on game coverage and news content.

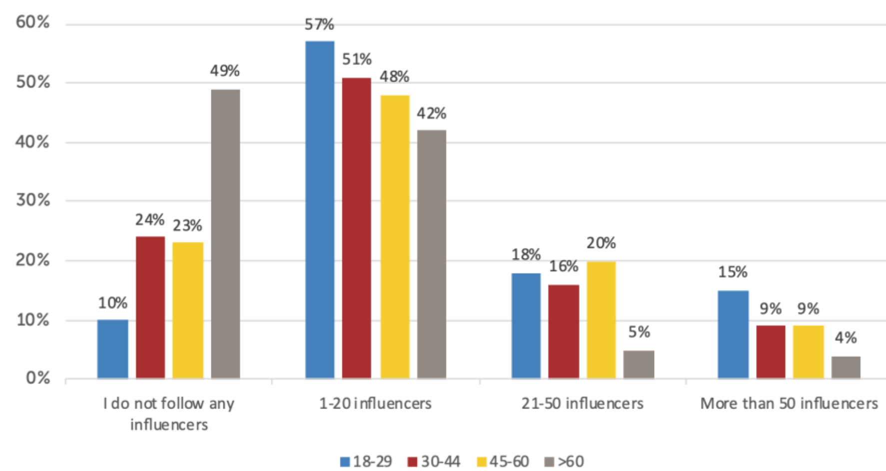
## 3.2 Influencer Impact

Influencers across multiple channels and passion areas have also taken center stage as important campaign ambassadors. From micro-influencers with concentrated followings in niche areas to celebrities with millions of social media followers hanging on their every word, the impact of influencer messengers is hard to overstate.

According to eMarketer, 62% of people trust micro-influencers for news/information above other means of communication or “A-listers.” The male audience turns to Facebook, X (formerly Twitter) and blogs to gain knowledge and news, while the female audience relies on Instagram and Facebook. People claim to be “immune” to marketing in general; instead, they seek out relevant and interesting information from influencer creators who “co-create” within audience communities.

Authenticity is especially important in social media, as Gen Zers become more judicious with how and where they spend their time. Content creators who know Gen Z trends and culture are much more relatable to the audience and create better engagement. Approximately 54% of the male audience also wants to see authenticity in ads and less showy ads. They prefer logical messaging over emotional messaging. They also like to see the outcome first, and then see the entire background of what led to that outcome. The female audience is very similar in looking at authenticity and for “people like them” with whom they can associate.

**Figure 9: Younger Generations Follow Multiple Influencers for Entertainment and Information**



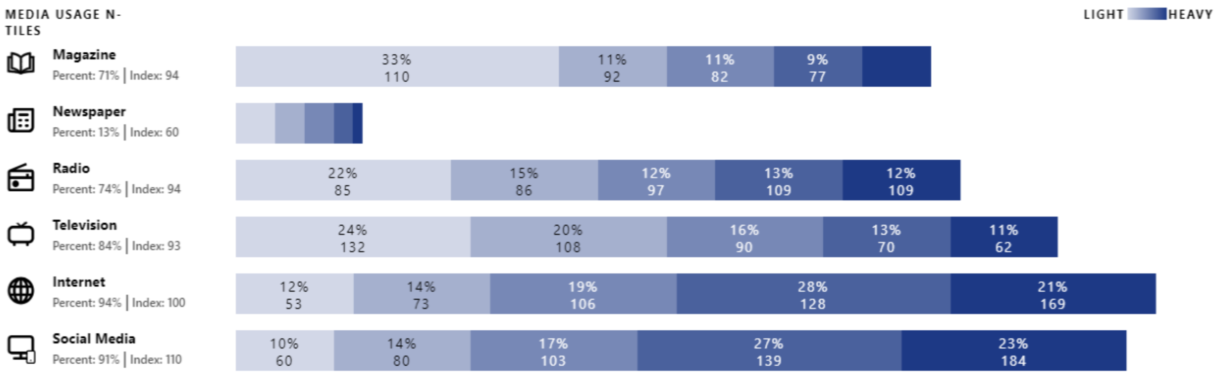

*Source: IZEA 2023 Influencer Marketing Study Report*

# 4.0 Media Channel Trends

Overall trends for media consumption among 18- to 34-year-old adults are dominated by the internet, social media and television delivery. These channels provide the highest reach and high concentrations of heavy use among the target audience (Figure 10).

This audience continues to index very high as heavy internet (174) and social media (188) users. Radio also over-indexes in the heaviest quintile for the target audience (111). Notably, this audience indexes highest for light TV viewership (134), indicating that they watch television selectively. This supports an ongoing strategy of buying specific programming and employing audience targeting to reach NHTSA's intended audience.

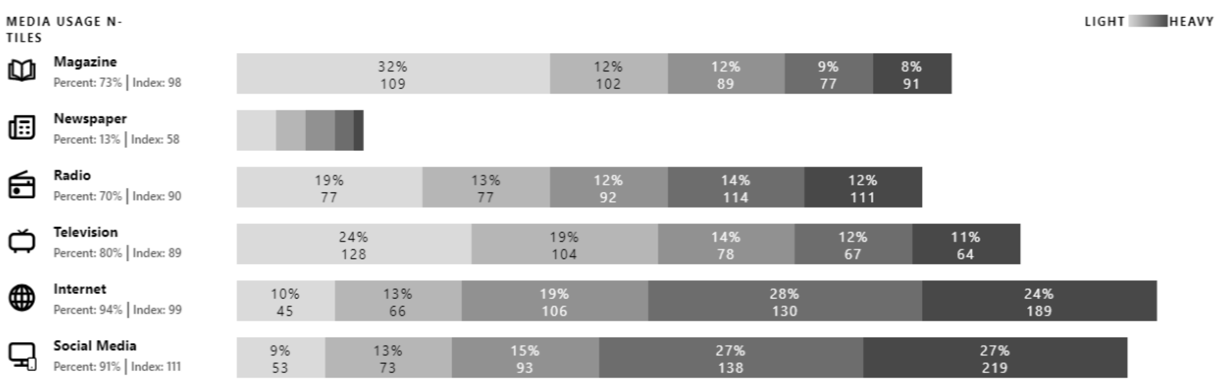
**Figure 10: Media Usage Among General Market 18- to 34-Year-Olds**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*
**Note: Complete quintile percent and index data for Magazine and Newspaper available in section 7.0 Appendix*

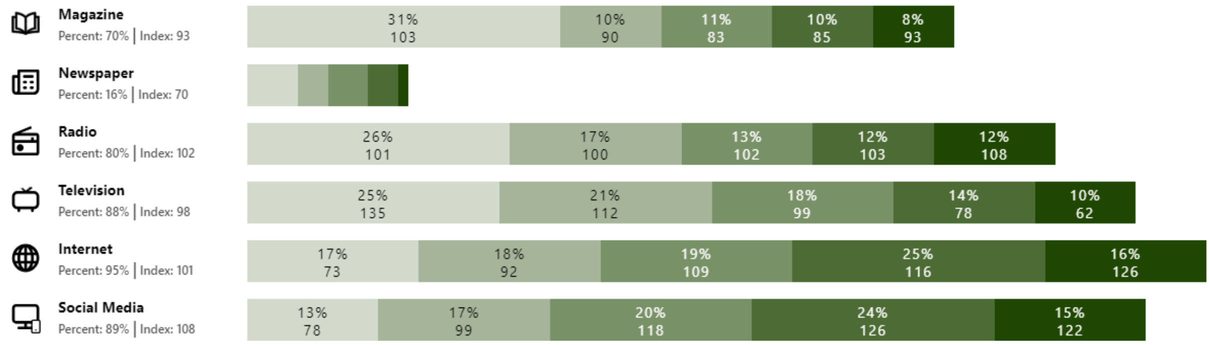
Comparing media usage between Gen Z and Millennials reveals an intensification of the trend toward internet and social media consumption for younger people. Among the Gen Z cohort, the top two quintiles of heavy internet users constitute more than 57% of the audience compared to 43% of Millennials. Social media usage shows a similar 15-point gap between the top two quintiles for use between the age groups (Figure 11, Figure 12).

**Figure 11: Gen Z (Born 1997–2005) Media Usage**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*
**Note: Complete quintile percent and index data for Newspaper available in section 7.0 Appendix*

**Figure 12: Millennial (Born 1977–1996) Media Usage**

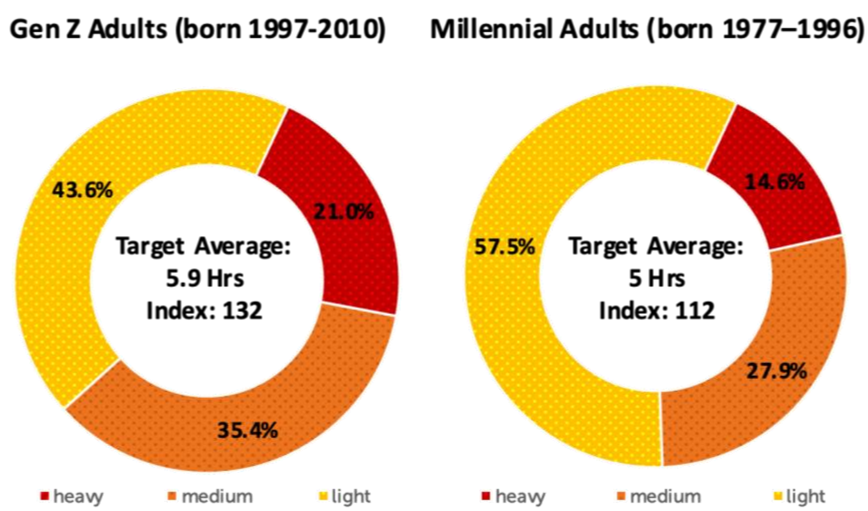



*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*
**Note: Complete quintile percent and index data for Newspaper available in section 7.0 Appendix*

Magazines reach 71% of the 18- to 34-year-old audience. While the overall usage percentage is high, light usage indicates a focus on specific, perhaps niche, publications. Buying advertising in print magazines is not recommended, but knowing these trends helps determine what the target audience is consuming and enables NHTSA to consider magazines' digital counterparts for custom content opportunities.

Despite the increasing number of hours Gen Z and Millennials spend on the internet, the way they classify their usage has shifted, which further bolsters the importance of targeting the Distracted audience online. About 21% of Gen Z and 15% of Millennials consider themselves heavy internet users (Figure 13). This is significantly down from 2021, when 60% of Gen Z and 48% of Millennials identified their internet usage as heavy. While time spent online shows a slight decrease, this can be attributed to comparing it to pandemic data, where online time spent was extremely high. Current consumption is still considered "heavy," but that is balanced with more online consumption overall and the growth in digital.

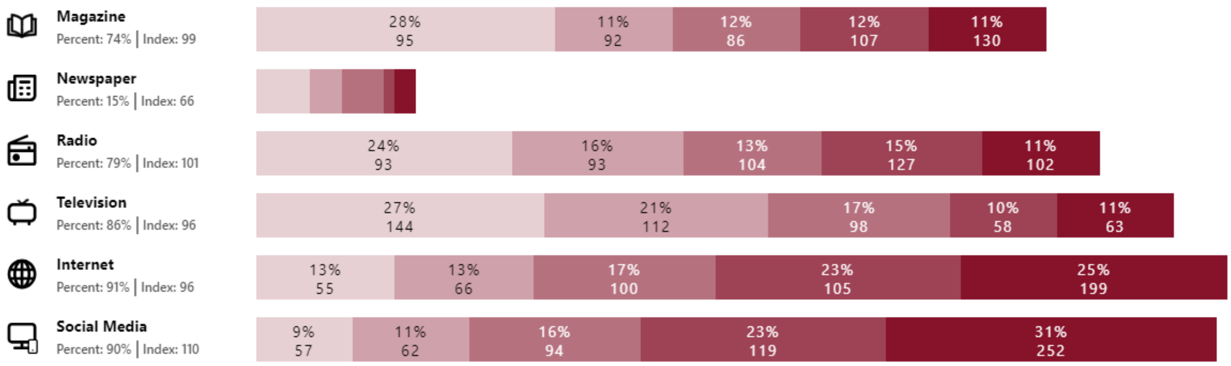
**Figure 13: Hours Spent on the Internet Comparison Between Gen Z and Millennial Adults**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

Similar to the general market audience, 18- to 34-year-old Hispanic adults who speak Spanish at home are turning to the internet and social media for their media consumption. Over 31.2% of the Hispanic audience heavily use social media, and 21.6% heavily use social media (Figure 14), with mobile devices as the preferred access point for both. Engagement levels show that ads created specifically for mobile activation continue to yield high results. NHTSA will continue focusing on mobile creative assets to engage this target best.

**Figure 14: Media Consumption Habits of Hispanic Adults 18 to 34 Years Old Who Speak Spanish at Home**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*
**Note: Complete quintile percent and index data for Newspaper available in section [7.0 Appendix](#)*

As the media consumption data outlined in this section demonstrates, the primary and secondary target audiences and the two age cohorts in the 18- to 34-year-old audience demographic share some common high-level media trends, albeit at different intensities.

To ensure that the entire target audience receives the 2024 Distraction messaging, NHTSA will select media channels that reach the Millennial and Gen Z audiences equally. To capture the attention of this audience with a short flight window, NHTSA will run across streaming TV, streaming audio and terrestrial radio, OOH, digital display and paid social media, and will work with direct partners that can amplify campaign assets. This recommendation allows the message to run on platforms where the target audience consumes media the most.

## 4.1 Video Delivery

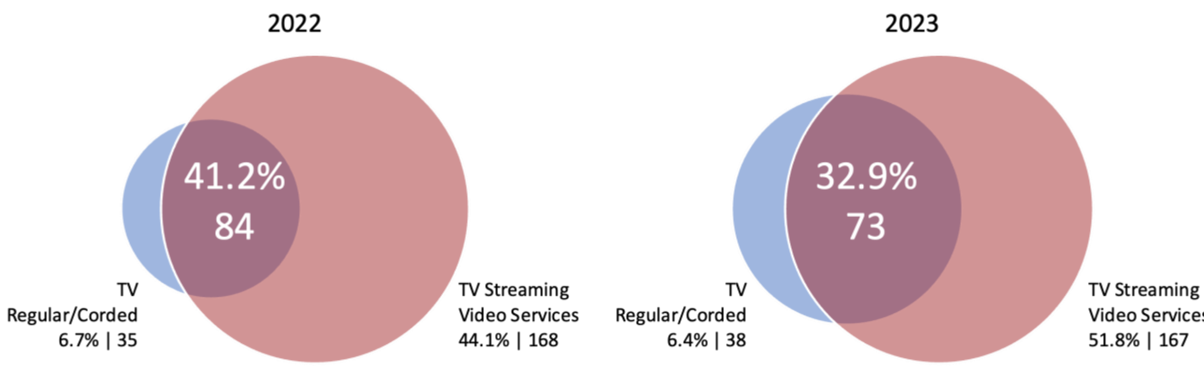
Many devices—television sets, tablets, computers, handsets and even gas station screens—can be used to connect with audiences consuming increasing amounts of video content via a widening array of platforms. This section explores video consumption habits across the device ecosystem.

It should be noted that the 2024 Distraction campaign will only pursue TV buys through streaming. This is because most of the target audience is reachable via connected TV services, and past challenges with linear (traditional) TV buys meeting goals within the one-week flight.

### 4.1.1 Connected TV and Streaming Growth

The overlap of the target audience using both linear and streaming platforms to consume TV is decreasing—this past year saw a 7.7% increase in those using streaming services exclusively (Figure 15). This shift may draw from an influx of streaming services like Amazon and Apple taking on large live sports contracts, drawing audiences away from linear TV services and even further into streaming. Although there are more streaming platforms and there has been a slight shift towards more streaming, scale is still a concern. A balance of linear TV for "appointment viewing" of live programming and streaming helps to extend scale.

**Figure 15: Linear (Traditional) TV vs. TV Streaming and Video Services Viewing for 18- to 34-Year-Old Adults in 2022 vs. 2023**




*Source: 2022 Doublebase GfK MRI (Left) and 2023 Doublebase GfK MRI (Right)*

In addition to sports viewership, the 2024 Distraction plan must consider the streaming platforms adults 18 to 34 years old frequent most. When broken down by platforms, MRI shows that 18- to 34-year-old adults can be found across multiple services (Figure 16). While Netflix, Prime, Hulu and Disney+ continue to hold the top spots in 2023, Netflix and Disney+ do not currently allow audience targeting. Until those capabilities develop, other streaming services that hold large amounts of the audience and high indexes will be prioritized.

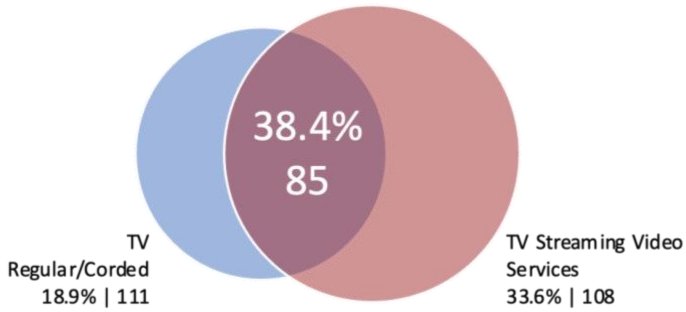
**Figure 16: Streaming Services Watched in the Last 30 Days**

| | 18–34 All | | 18–34 Hispanic | |
|---|---|---|---|---|
| | Weighted Pop. (000) | Index | Weighted Pop. (000) | Index |
| **Netflix** | 58,710 | 117 | 15,587 | 119 |
| **Hulu** | 40,502 | 138 | 9,634 | 126 |
| **Disney+** | 39,089 | 143 | 10,761 | 151 |
| **Prime Video** | 37,779 | 99 | 8,519 | 86 |
| **HBO Max** | 28,896 | 142 | 7,660 | 144 |
| **Peacock** | 20,252 | 107 | 4,864 | 98 |
| **Paramount+** | 19,347 | 106 | 4,430 | 93 |
| **Tubi** | 10,845 | 104 | 2,848 | 105 |
| **Apple TV+** | 10,440 | 109 | 2,918 | 117 |
| **ESPN+** | 7,500 | 112 | 2,201 | 127 |
| **Pluto TV** | 7,174 | 93 | 2,057 | 102 |
| **Discovery+** | 4,699 | 99 | 1,130 | 92 |
| **Freevee** | 4,229 | 70 | 1,061 | 67 |
| **Facebook Watch** | 3,515 | 154 | 1,202 | 202 |

*Source: 2023 Summer MRI-Simmons USA*

For the Hispanic market, the video strategy will shift focus to Spanish CTV due to the growth of streaming video services with the Hispanic audience and to avoid under-delivery on linear TV during the short flight. Although linear TV continues to over-index for the target audience, nearly 40% of the audience is also consuming streaming (Figure 17). The 2024 Distraction campaign will seek CTV counterparts of traditional network channels and continue partnering with 100% Spanish-language content platforms. NHTSA will also explore opportunities with newer partners such as Canela.

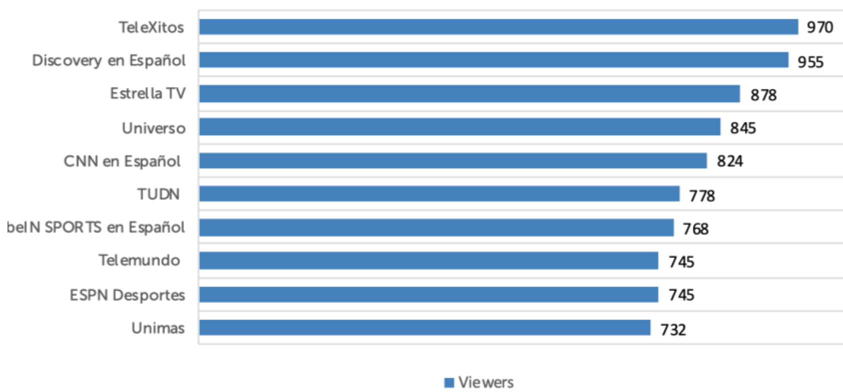
**Figure 17: Linear (Traditional) TV vs. TV Streaming and Video Services Viewing for 18- to 34-Year-Old Hispanic Adults Who Speak Mostly Spanish by Index**




*Source: 2023 Doublebase GfK MRI*

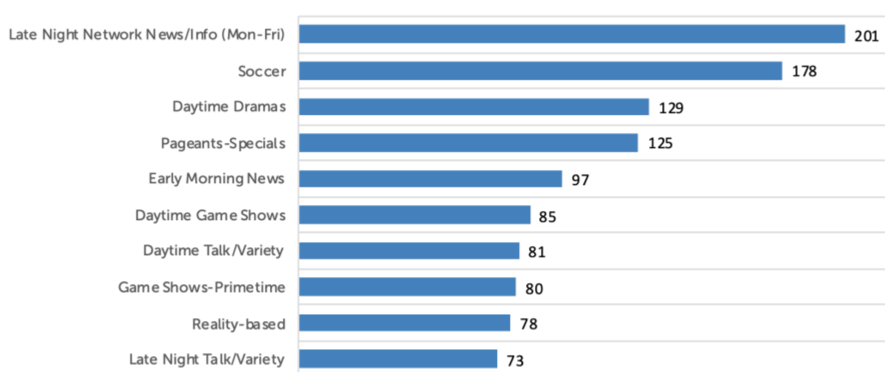
From a content perspective, Spanish-language network sports and entertainment, along with daytime, late night/news and specials consumption (Figure 18, Figure 19) continues to over-index with the 18- to 34-year-old Hispanic audience.

**Figure 18: Top TV Networks for Hispanic Adults 18 to 34 Years Old Who Speak Spanish at Home by Index**




*Source: 2023 Doublebase GfK MR*

**Figure 19: Top TV Shows Hispanic Adults 18 to 34 Years Old Who Speak Spanish at Home**



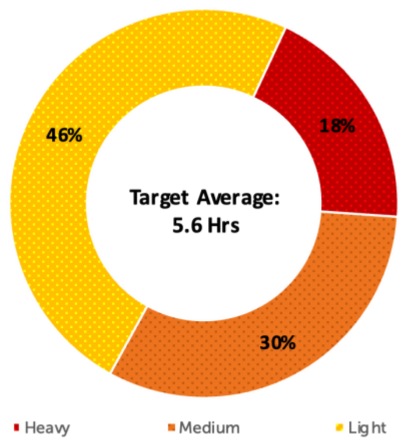

*Source: 2023 Winter MRI-Simmons USA*

### 4.1.2 Online Usage/Digital Video Delivery

The number of video-enabled delivery vehicles available to marketers has grown alongside online usage growth for the target audience. As shown in Section 4.0 Media Channel Trends, internet usage continues to increase as Gen Z ages into the 2024 Distraction target demographic. From 2022 to 2023, the total average of hours spent on the internet went from 5.3 to 5.6 hours.

Approximately 30% of the Distraction target audience sees themselves as medium users and spend 3.5–7 hours online, while 18% see themselves as heavy users and spend 7–10 hours daily online. This means that nearly 50% of the target audience spends most of their daily media consumption time within the digital landscape (Figure 20).

**Figure 20: Time Spent Using the Internet by 18- to 34-Year-Old Adults**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

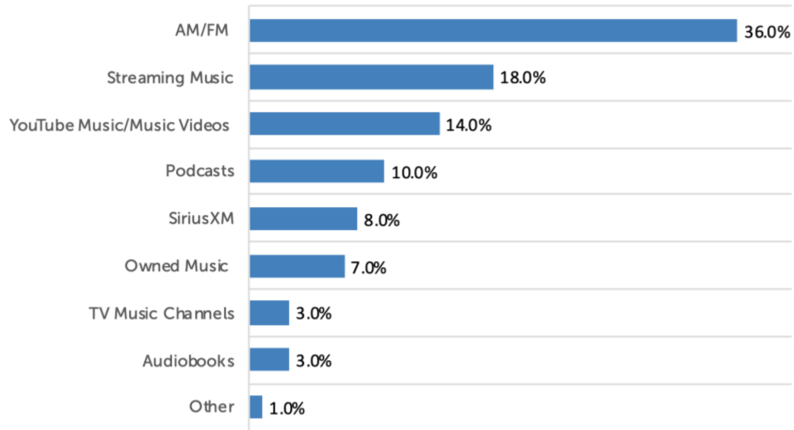
With so much online usage, many apps, websites and gaming devices provide chances to deliver the Distracted Driving message via digital video in pre-roll, mid-roll and integrated content. The 2024 Distraction campaign will explore all these opportunities through partners who can deliver cost-effective access and engagement with the target audience.

## 4.2 Audio Delivery

### 4.2.1 Terrestrial Radio

Terrestrial radio remains a cost-efficient way to reach target audiences. Adults 18 years old and older turn to radio for 36% of overall audio listening, followed by streaming music at 18% (Figure 20). When considering the percentage of ad-supported streaming versus AM/FM radio, terrestrial radio remains the leader inside and outside the car for adults 18 years old and older (Figure 21).

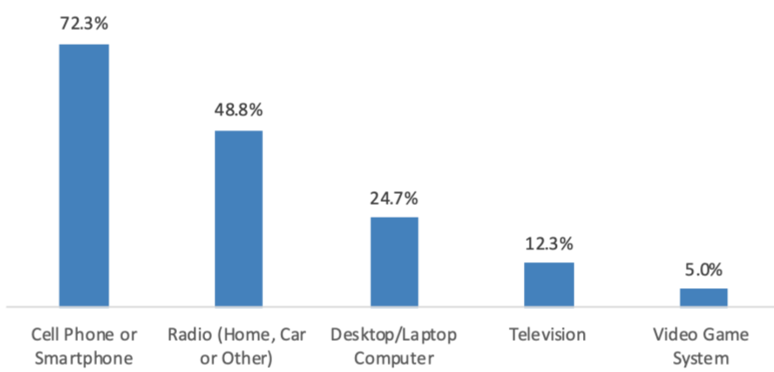
**Figure 21: Where Adults 18 Years Old and Older Are Listening to Audio**




*Source: 2023 Edison Research Share of Ear Q2 Share of Ear*

When looking into how 18- to 34-year-old adults listen to audio, around 70% of the audience listens on cell phones and smartphones. Although phones hold an impressive lead, this audience also listens to devices within the home, car and other (including smart devices) at around 48% and personal computers at 24% (Figure 22). Terrestrial radio buys can reach these devices through individual radio streaming services that act as a counterpart to the network buy. Large radio networks can be reached through Google Home/Alexa devices to extend the buy to devices outside the car and personal radios.

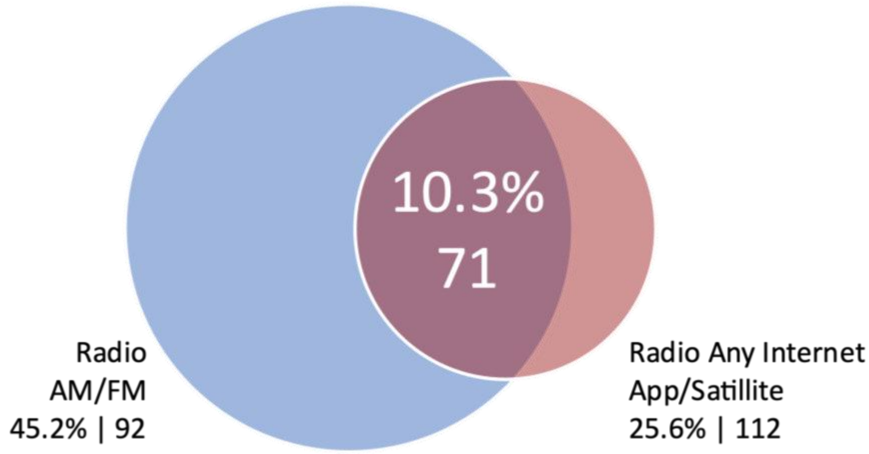
**Figure 22: How Are Adults 18 to 34 Years Old Are Listening to Audio**




*Source: 2023 Doublebase GfK MRI*

When narrowed to the 2024 Distraction target demographic, terrestrial radio provides the best ad-supported audio reach, with 55.5% of the demographic listening to AM/FM (Figure 23).

**Figure 23: Where Adults 18 to 34 Years Old Are Listening to Audio**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

While Millennials and Gen Z listen to FM radio more than other audio platforms, fewer Gen Zs (49.22%) tune into FM radio than Millennials (59.72%) (Figure 24). This drop will continue to be monitored yearly; however, this number has stayed in line with 2022 data, and terrestrial radio continues to provide the needed reach to hit the demographic.

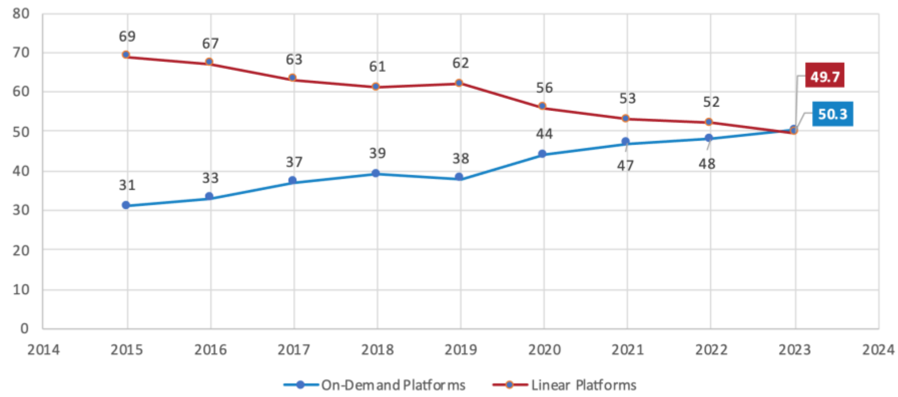
**Figure 24: How Gen Z and Millennials Listen to Audio**

| | Gen Z (Born 1997–2010) (Only Includes Respondents Ages 18 Years Old and Older) | | Millennials (Born 1977–1996) | |
|---|---|---|---|---|
| | Weighted (000) | % | Weighted (000) | % |
| **Any FM Listening** | 16,891 | 49.22% | 52,782 | 59.72% |
| **Any AM Listening** | 1,558 | 4.54% | 5,158 | 5.84% |
| **Any Internet/App** | 9,722 | 28.33% | 26,486 | 29.97% |
| **SiriusXM Radio (Any Satellite)** | 2,306 | 6.72% | 10,273 | 11.62% |

*Source: 2023 MRS-Simmons Doublebase USA Weighted to Population (000)*

One major shift to be considered in terrestrial versus streaming audio is time spent listening. Through 2022, Americans spent more time with linear audio platforms than streaming. For the first time in 2023, on-demand streaming audio has surpassed linear audio platforms, though only slightly (Figure 25). While terrestrial radio continues to dominate the reach and share of the audience, this trend will continue to be monitored. Terrestrial radio networks will be challenged to integrate the use of their on-air talent into the plans for NHTSA to leverage engagement with their vast social networks. These extensions will capitalize on existing listener relationships with trusted local voices to deliver NHTSA’s message.

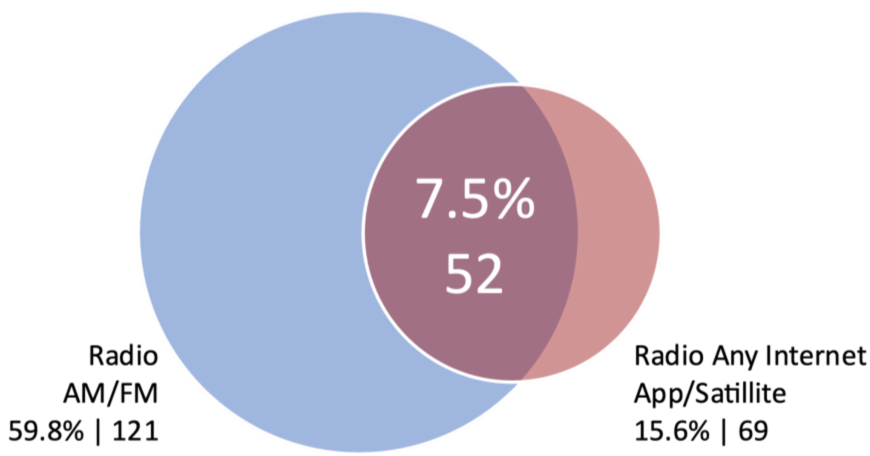
**Figure 25: Share of Audio Listening 2015–2023**




*Source: Edison Research Share of Ear 2023*

Among the Hispanic target audience, terrestrial radio continues to over-index within the target, with nearly 60% of the audience listening to terrestrial radio vs. 15.6% listening to audio streaming (Figure 26). The audio approach will continue with terrestrial while incorporating streaming audio platforms and extensions. We will explore in-car app opportunities to deliver the 2024 Distraction message when the target is more tempted to drive and use their phone.

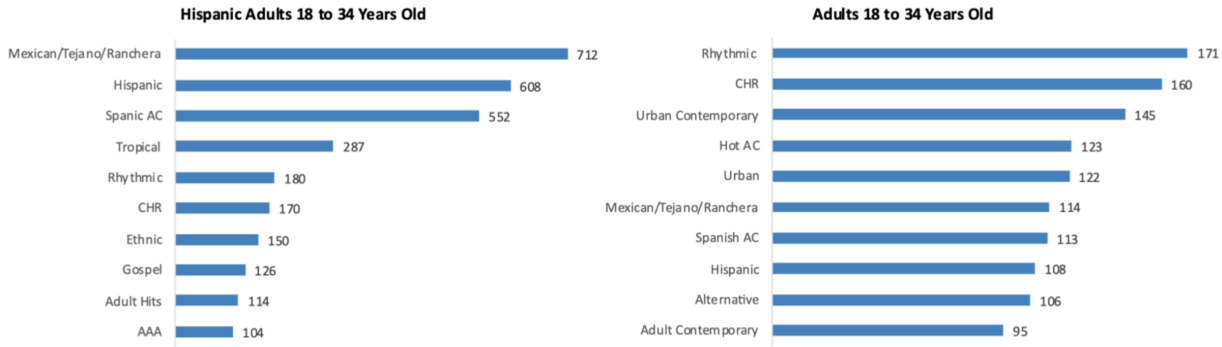
**Figure 26: Linear (Traditional) Radio vs. Radio Streaming for 18- to 34-Year-Old Hispanic Adults Who Speak Mostly Spanish by Index**




*Source: 2023 Doublebase GfK MRI*

A mix of AM/FM radio stations and over-indexing radio formats will be considered as part of the terrestrial radio plan to reach the 18- to 34-year-old Hispanic target when listening to a variety of radio formats, including Spanish adult contemporary (AC), regional Mexican, reggaeton/urban, bachata and tropical music (Figure 27). The terrestrial radio strategy will include high-rated stations and structures, consideration for specific programming and music genres resonating more in key markets. Overlap must be considered with the general market audience, who continue to index high with rhythmic and CHR and traditional Spanish-language music, such as Mexican/tejano/ranchero and Spanish AC.

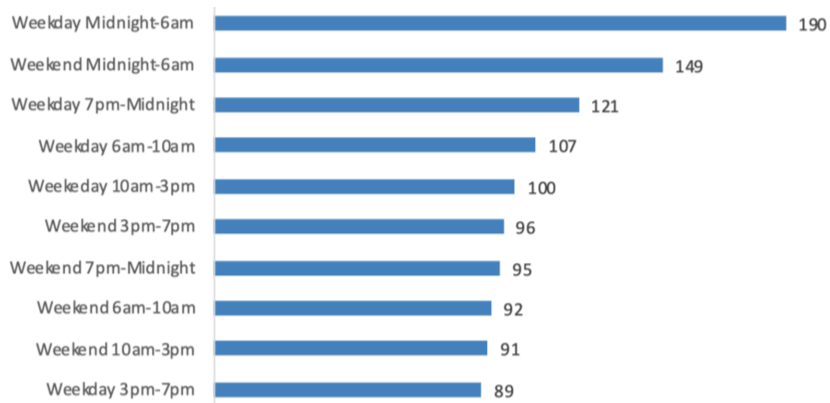
**Figure 27: Top Radio Formats for Hispanic Adults 18 to 34 Years Old and Adults 18 to 34 Years Old**




*Source: 2023 Doublebase GfK MRI*

In addition, partnerships with top stations will include message reads by DJ personalities during mid-morning/evening commutes or weekends (Figure 28). These integrations will focus on those key drive times to drive awareness of the 2024 Distraction messaging and include a weekend night “party playlist” when the target audience is out and about. All playlists will be vetted to ensure brand safety.

**Figure 28: Top Radio Listening Times for Hispanic Adults 18 to 34 Years Old**

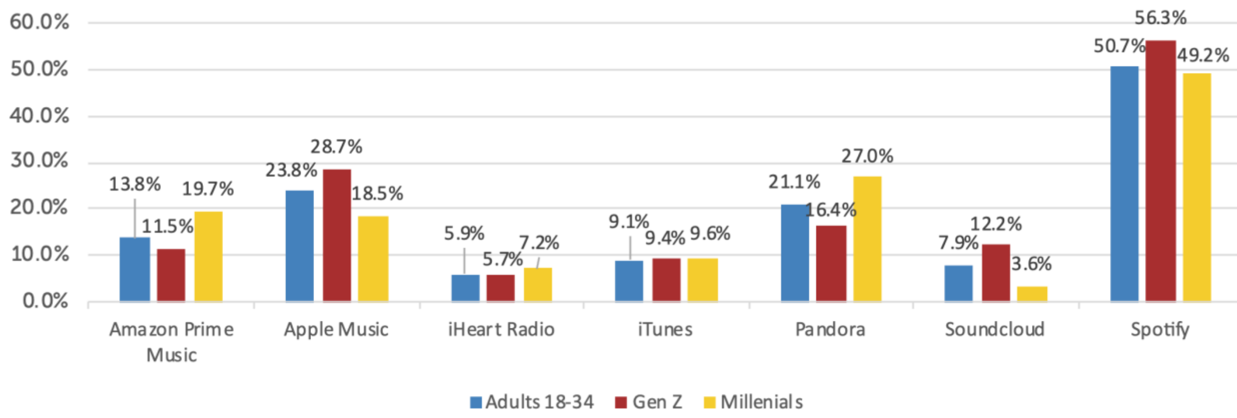



*Source: 2023 Doublebase GfK MRI*

### 4.2.2 Streaming Audio

Streaming audio is growing the most among the younger generations and is thus an important consideration for reaching the 2024 Distraction target demographic. Each Distraction generation has streaming audio preferences (Figure 29). MRI Insights reports that Gen Z listeners are more likely to turn to Apple Music, Soundcloud and Spotify. While Millennial listeners turn to Amazon Prime Music and Pandora for digital audio, they also listen to Spotify, making targeting the app necessary to reach the entire target audience.

**Figure 29: Top Streaming Audio Platforms by Generations (In Last 30 Days)**




*Source: 2023 Doublebase (November 2022 to January 2023 ) GfK MRI Weighted to Population (000)*

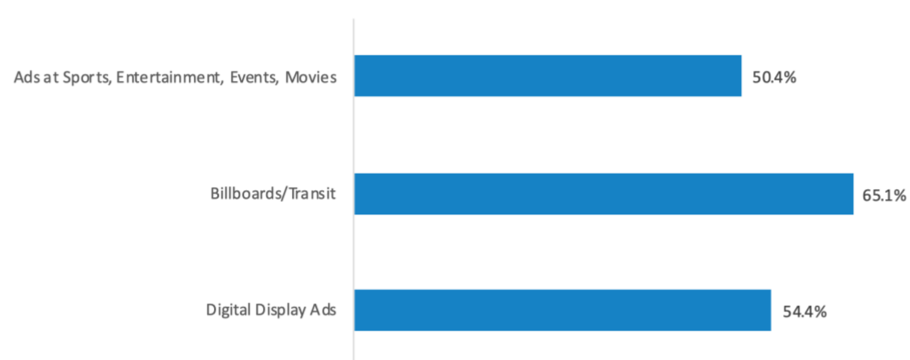
As music streaming ad services expand, NHTSA will continue to explore new ways to target the demographic where they are listening. Like their traditional radio counterparts, streaming audio partners also offer talent integrations and custom content that should be explored to increase engagement within the audio landscape.

## 4.3 Out-of-Home

Out-of-home (OOH) media extends the campaign message beyond the audience's screen and provides a last line of defense to encourage non-distracted driving. MRI data shows OOH media effectively reaches 18- to 34-year-old adults. Billboards have the highest reach at 65.1%, and digital display ads at 54.4%. Sports and movie ads both over-index, but have the lowest reach to the target at 50.4% (Figure 30).

Due to the weeklong flight of the 2024 Distraction campaign, a digital OOH strategy would provide an additional boost to the 2024 Distraction messaging. Digital OOH strategies should be integrated into digital, social and influencer strategies where the target demographic spends most of its time for maximum impact and message penetration.

**Figure 30: Out-of-Home Media Usage by 18- to 34-Year-Old Adults**




*Source: 2023 Doublebase GfK MRI*

## 4.4 Digital Display

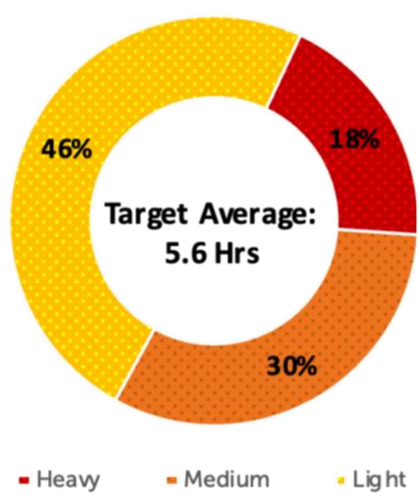
Digital display capitalizes on the trends in online usage discussed in Section 4.0 Media Channel Trends and Section 4.1 Video Delivery. In addition to the video-based delivery, programmatic and publisher direct buying will deliver digital display assets to consistently reach the intended target audience where they spend time on the internet. Programmatic can have a lower CPM than its publisher direct counterpart to allow for larger activations across a multitude of sites. Programmatic target parameters exclude sites bought on publisher direct to avoid duplication and waste of media dollars.

This approach provides continuity of the 2024 Distraction message on additional sites over the one-week flight. It also guarantees the target audience sees the message where they spend time on the internet, within brand safety guidelines.

Internet usage continues to grow as Gen Z ages more into the 2024 Distraction target demographic. From 2022 to 2023, the total average of hours the general market target audience spends on the internet went from 5.3 to 5.6 hours. Approximately 30% of the target audience sees themselves as medium users and spend 3.5–7 hours online, while 18% see themselves as heavy users and spend 7–10 hours daily online.

The 2024 Distraction general market audience is spending more time digitally year after year. Eighteen percent of the target audience classify themselves as heavy internet users (Figure 31), spending 7–10 hours online daily. Of those online, 76% are consuming digital media on their mobile devices, exemplifying the need to focus on mobile first. It will be vital to focus on media partners that can execute high engagement levels with the general market audience utilizing rich media units, dual-language units, etc., and can show engagement insights. According to research, the general market audience also over-indexes for those having 2.9+ devices. Therefore, balancing mobile-first and cross-device is crucial to ensure message penetration.

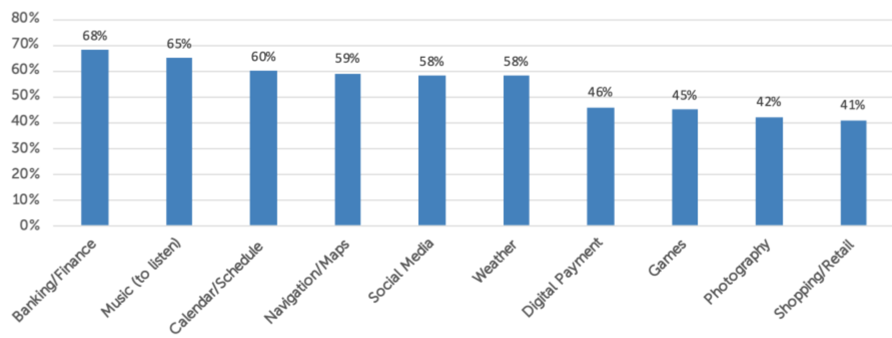
**Figure 31: Time Spent Using the Internet by 18- to 34-Year-Old Adults**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

The general market audience is highly connected, and mobile-first app usage is a key indicator of what the audience is spending time online consuming and engaging with. The target over-indexes for activities like audio listening, social media consumption, playing games, handling their banking needs and taking photos (Figure 32). This data provides insight and guidance for potential apps and sites that could be used for the Distraction campaign to align with the audience's daily internet activities.

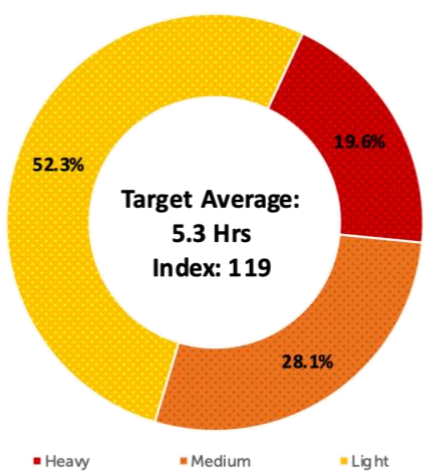
**Figure 32: Top 10 Mobile Apps for General Market Adults 18 to 34 Years Old**




*Source: 2023 MRI-Simmons Spring Doublebase USA*

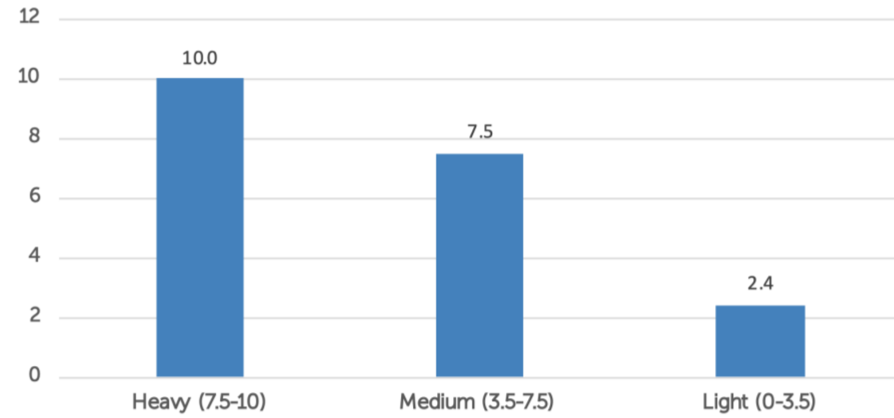
The 2024 Distraction campaign Hispanic target spends an average of 5.3 hours on the internet daily (Figure 33) and heavy internet usage can be as high as 7.5–10 (Figure 34). A mobile-first approach is vital to continue engaging the target while connected to the internet to remind them about the Distraction messaging.

**Figure 33: Daily Internet Usage by 18- to 34-Year-Old Hispanic Adults Who Speak Mostly Spanish**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

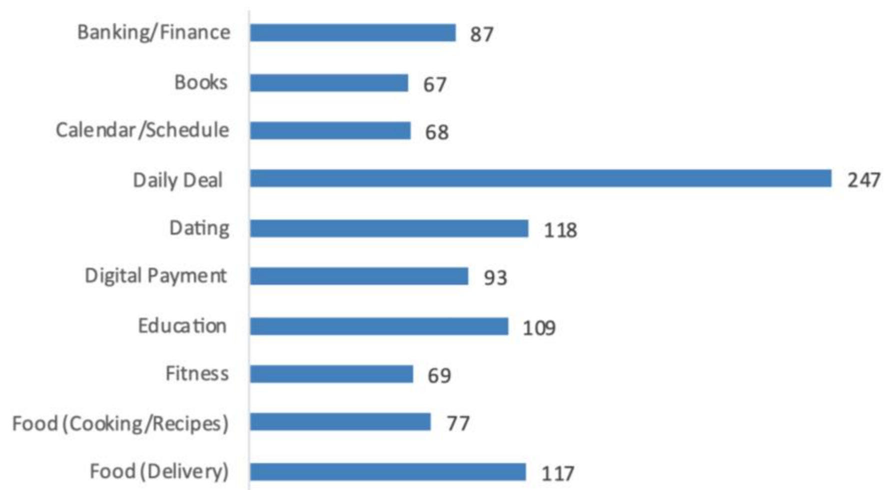
**Figure 34: Hours Spent on the Internet by Hispanic Adults 18 to 34 Years Old**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

Hispanic 18- to 34-year-old adults are digitally and socially connected, using mobile apps to find deals, dating, food delivery and education as the app categories heavily used (Figure 35). The media plan will consider partners with scale and capabilities to identify audiences actively using those apps across multiple categories to target the Hispanic demographic and layer additional targeting capabilities informed by their media usage behavior to users who downloaded apps in those categories.

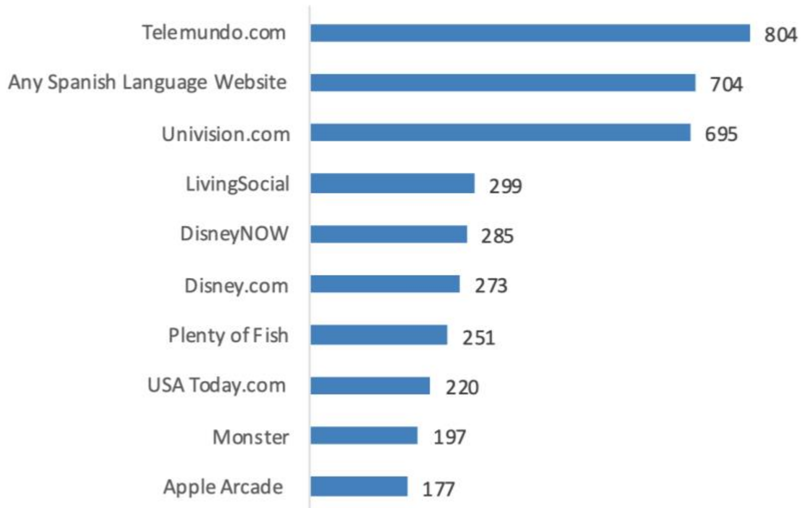
**Figure 35: Top 10 Mobile Apps for Hispanic Adults 18 to 34 Years Old Who Speak Spanish at Home**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

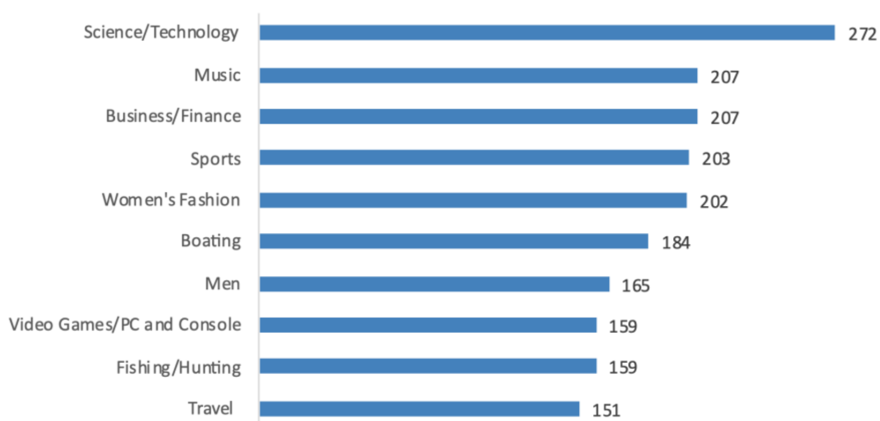
The programmatic tactics of the 2024 Hispanic Distraction media plan will reach the Hispanic audience with targeted video and display ads on multiple screens to drive the most impact. The 2024 Distraction message will run on Spanish-language sites, including sports news (Figure 36) and will consider digital extensions of major magazine titles (Figure 37) to reach the Hispanic target audience.

**Figure 36: Top Websites for Hispanic Adults 18 to 34 Years Old Who Speak Spanish at Home**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

**Figure 37: Top Magazine Genres for Hispanic Adults 18 to 34 Years Old Who Speak Spanish at Home**



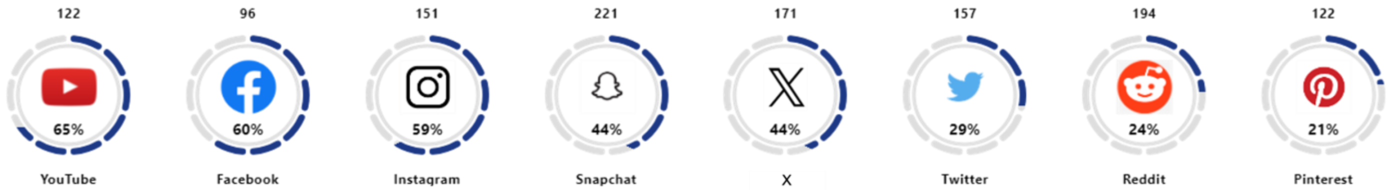

*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

## 4.5 Paid Social Media

Paid social media is one of the most significant driving forces that helps with the growth of internet usage. In fact, the general market audience spends about 3.2 hours per day on social media platforms. As of 2023, there are over 100 social media platforms worldwide, but the 2024 Distraction audience remains faithful users of only a handful. When looking at the top eight social media platforms of the 18- to 34-year-old demographic, over 50% of the audience are users of Instagram, Facebook and YouTube (Figure 38). This is the first year we have seen YouTube in the top position; it has become a platform for user engagement, not just a place to watch videos. NHTSA has and will continue to share messages on YouTube, Facebook, Instagram and X (formerly Twitter).

**Figure 38: Top Eight Social Media Services of Adults 18 to 34 Years Old**

**Top number—index | Bottom number—reach (%)**

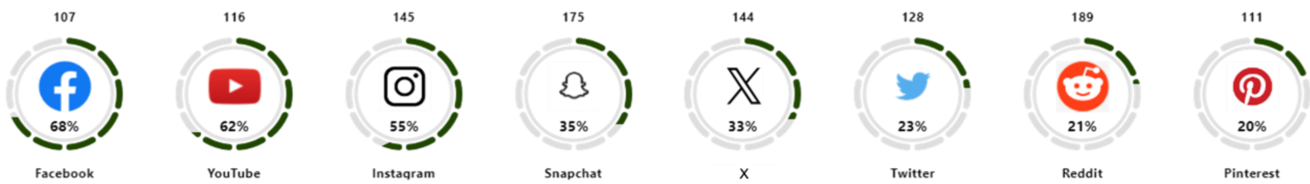



*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

It is also vital to understand which social media service draws in each generation within the demographic. Facebook is the top-performing platform for Millennials, with 68% using the site (Figure 39). YouTube comes in second at 62%, over 7% higher than Instagram, which came in third. Millennials remain loyal to Facebook and YouTube (and, to a lesser degree, Instagram), and only these three platforms have more than 50% of the audience.

**Figure 39: Top Eight Social Media Service Preferences for Millennial Adults**

**Top number—index | Bottom number—reach (%)**

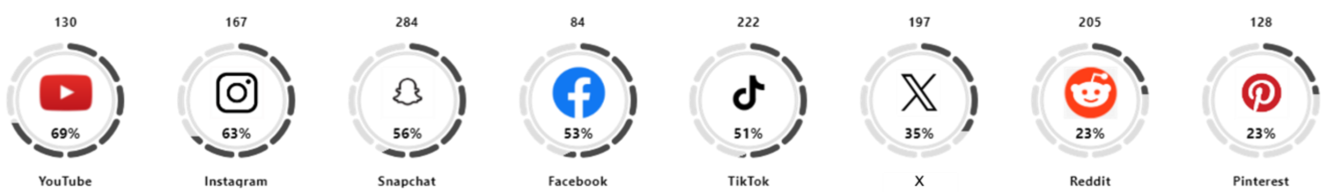



*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

Gen Z adults have different social media habits than their Millennial counterparts. While millennials only had three social media platforms with over 50% of users, Gen Z has five (Figure 40). Not only are they spending a lot of time on social media, but they are also spending it on multiple platforms. They are also drawn to different social sites than Millennials, with YouTube holding 69% of the user base and Instagram coming in second at 63%. This is over an 8% increase in Instagram users compared to Millennials. Facebook also has seen a significant shift, falling to fourth zplace with Gen Z even though it holds 53% of the audience. This is a 15% decrease in users when comparing the two generations.

**Figure 40: Top Eight Social Media Service Preferences for Gen Z Adults**

**Top number—index | Bottom number—reach (%)**

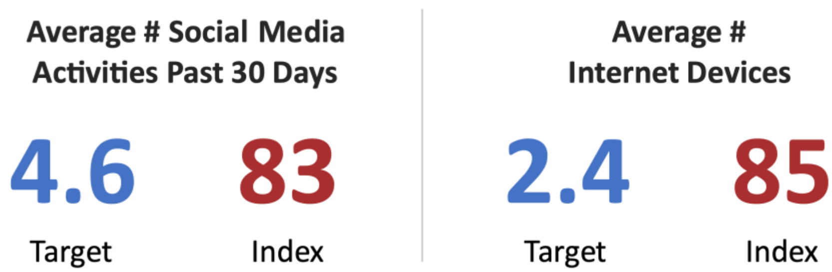



*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

For the 2024 Distraction campaign, YouTube and Facebook will again be pivotal to reaching the target audience, but X (formally Twitter) is quickly growing in Gen Z users. Although X was not within the top five platforms for either generation, there was a 12% increase in Gen Z users. This means that the user base of X is seeing growth between the generations and may become more of a major player as Gen Z takes over the target demographic.

The Hispanic target audience is also heavily consuming social media, with the audience spending an average of 4.6 hours on the platforms during 30 days across more than one device (Figure 41).

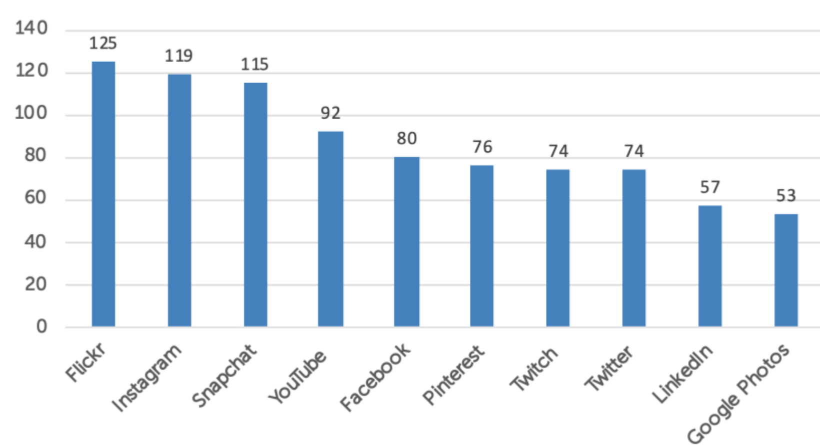
**Figure 41: Average Number of Social Media Activities in the Past 30 Days Used by 18- to 34-year-old Hispanic Adults Who Primarily Speak Spanish**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

The Hispanic target is highly engaged in social media, Instagram, and Snapchat (Figure 42). Instagram will be essential to reaching the audience during the 2024 Distraction campaign as it is the social media platform that connects the highest with the Hispanic target.

**Figure 42: Index of Social Media Platforms Used by 18- to 34-year-old Hispanic Adults Who Primarily Speak Spanish**




*Source: 2023 Doublebase GfK MRI Weighted to Population (000)*

The plan will continue to explore opportunities to engage and connect with the target audience across multiple approved platforms to deliver the 2024 Distraction message with a heavier weight/spend on Instagram.

# 5.0 State-Level Campaign Extension Opportunities

The state-level plans can execute several strategies to build upon the base paid media reach provided in the national plan.

## Video

The national plan will use programmatic TV and OTT/CTV to reach the target audience. This will run on appropriate network apps via full episode players and OTT services. The state-level plans can build off this base by including TV programming that efficiently reaches the target audience, including cable if penetration is sufficient, and geo-targeting any problem areas in their local markets. Additionally, online video (OLV) is a great way to extend the message across programmatic and publisher direct partners to raise engagement with video views before consuming the target's website content. Incorporating video in any media plan across different channels can also help define where and when message engagement is happening, as well as who is being engaged.

## Audio

The national radio plan may run in the 50 GRPs/week range. At the national level, radio will be used for its efficiency and, due to its in-vehicle strength, its ability to build frequency. States can consider local radio buys that allow local on-air talent to lend their voices and social networks to enhance the message further. Additional extensions to terrestrial radio can be enhanced with digital audio.

## Digital Display

The target audience uses digital media heavily, and a digital display effort should be a significant part of state-level plans. Specifically, the target audience consumes the majority of their online content on mobile devices. This can include using publisher-direct or programmatic efforts outside of those sites on the national plan. Digital display can be a great way to extend other media tactics within your state plans. Looking at media partners with strong mobile-first platforms and highly engaging or rich media ad units helps raise awareness and engagement. If states are running video, audio or OOH, check to see how digital display banner ads can be added as tactic extensions to help extend reach, frequency and engagement.

## Paid Social Media

Gen Z and Millennials spend between 2.25 and 3 hours daily on social media platforms. Being a part of that social "conversation" is key. Building paid social media campaigns to extend the state-level campaign helps extend the overall national and state campaigns.

## Rural Markets

If state-specific data indicates that the 2024 Distraction campaign should include rural areas, attention should be paid to broadband penetration to ensure adequate reach into those areas for digital tactics. States and regions with areas of low broadband penetration should consider supplementing the national campaign with traditional TV, radio and OOH buys. This should only be considered applicable for states with rural market issues to factor into plans.

# 6.0 Glossary

## Video

**Advertising-Based Video on Demand (AVOD):** Ad-supported video streaming.

**Audience Targeting**: Using data points to target specific population segments based on demographics, interests and behaviors.

**Automatic Content Recognition (ACR)**: ACR is a technology that leverages a content database to recognize and identify video and audio content with which a user is actively engaging.

**Brand Safety**: Keeping a brand's reputation safe when they advertise by ensuring that ads do not run adjacent to content that goes against brand guidelines.

**Connected TV (CTV)**: Another term for Smart TV, CTV refers to any TV that can be connected to the internet and access content beyond what is available via the standard offering from a cable provider. CTVs are designed to provide a more immersive experience for TV viewers by delivering interactive features, such as web browsing, social networking, video-on-demand and video streaming, as well as regular TV content.

**Linear TV**: TV service where the scheduled program must be watched at a specific time and on a particular TV channel.

**Over-the-Top (OTT)**: A device connected to a TV that directly provides streaming media as a stand-alone product to viewers over the internet, bypassing telecommunications, multi-channel TV and broadcast TV platforms that traditionally act as a controller or distributor of such content. Popular examples are Roku, Chromecast, Amazon Fire Stick, Apple TV and the major gaming consoles.

**TV Everywhere:** TV Everywhere refers to a type of subscription business model wherein access to streaming video content from a television channel requires users to “authenticate” themselves as current subscribers to the channel.

**Programmatic TV**: A TV ad buy that uses data and automation to target specific consumer audiences precisely.

**Subscription Video on Demand (SVOD)**: Similar to traditional pay-TV packages, SVOD allows consumers to access an entire content catalog for a flat rate, typically paid monthly. Examples of SVOD include Netflix, HBO Max, Disney+ and Amazon Prime. Typically, they do not offer advertising opportunities.

**Synched**: Uses a technology platform to automatically trigger a digital ad campaign based on what was viewed on TV. This could extend to video ads on laptops, mobile devices, and tablets, display ads, ads seen on social media or search marketing.

**Second Screen**: A mobile device used while watching TV, especially to access supplementary content or applications.

**ThruPlay**: The number of times a video is played to completion or for at least 15 seconds.

**TrueView**: A YouTube video ad format that gives the viewer options, the most common of which is the ability to skip the advertisement after five seconds. Sponsors pay only for ads viewed in their entirety or until 30 seconds have elapsed.

## Audio

**Audio Streaming**: Delivering real-time audio through a network connection.

**Average Quarter-Hour (AQH)**:  The average number of persons listening to a particular station for at least five minutes during 15 minutes.

**Terrestrial**: Any radio signal that travels along the land, is broadcast from a land-based station and is received by land-based receivers (AM/FM radio).

## Digital

**Esports**: A multiplayer video game competition played for spectators, often team-based and played for prize money. Esports are live-streamed and involve commentators and analyses like “traditional” sports.

**Free-To-Play Games**: Free-to-play (F2P) is a business model for online games in which the game designers do not charge the user or player to join the game. Instead, they generate revenue from advertisements or in-game sales, such as payment for upgrades, special abilities, unique items and expansion packs.

**Live-Streaming**: A gamer shares their gaming experience with fans/followers by live broadcasting their game. Some streamers consistently play the same games, and others try different games or follow trends.

**Metaverse**: A universal and immersive virtual world.

**Native Advertising**: A form of paid media that matches the look, feel and function of where the ad appears. Native ads are often found in social media feeds or as recommended content on a webpage.

**Programmatic Digital**: Automated bidding on advertising inventory in real-time for the opportunity to show an ad to a specific customer within a particular context.

**User Generated Content (UGC):** This refers to any form of content, videos, text, testimonials and audio, that has been posted by users on online platforms.

## General

**Cost Per Thousand (CPM)**: The cost of delivering 1,000 gross impressions.

**Flight**: Advertising timing strategy where ads or commercials are run during a period (called a flight). The higher the weight of the advertising, the more often it is seen.

**Frequency**: The number of times you touch each person with your message.

**Quintile:** Viewers, listeners, readers or consumers of a particular medium are ranked according to their usage and then divided into five equal groups, or quintiles, ranging from the heaviest to the lightest in media consumption.

**Reach**: The number of people you touch with your marketing message or the number of people exposed to your message during a given time.

# 7.0 Appendix

**Figure 10 Data**

| Media Usage N-Tiles | | Index | Percentage |
|---|---|---|---|
| **Magazine** | | | |
| | Light | 110 | 33.00% |
| | Light - Medium | 92 | 11.00% |
| | Medium | 82 | 11.00% |
| | Medium - Heavy | 77 | 9.00% |
| | Heavy | 87 | 7.00% |
| **Newspaper** | | | |
| | Light | 84 | 4.00% |
| | Light - Medium | 64 | 3.00% |
| | Medium | 76 | 3.00% |
| | Medium - Heavy | 29 | 2.00% |
| | Heavy | 49 | 1.00% |
| **Radio** | | | |
| | Light | 85 | 22.00% |
| | Light - Medium | 86 | 15.00% |
| | Medium | 97 | 12.00% |
| | Medium - Heavy | 109 | 13.00% |
| | Heavy | 109 | 12.00% |
| **Television** | | | |
| | Light | 132 | 24.00% |
| | Light - Medium | 108 | 20.00% |
| | Medium | 90 | 16.00% |
| | Medium - Heavy | 70 | 13.00% |
| | Heavy | 62 | 11.00% |
| **Internet** | | | |
| | Light | 53 | 12.00% |
| | Light - Medium | 73 | 14.00% |
| | Medium | 106 | 19.00% |
| | Medium - Heavy | 128 | 28.00% |
| | Heavy | 169 | 21.00% |
| **Social Media** | | | |
| | Light | 60 | 10.00% |
| | Light - Medium | 80 | 14.00% |
| | Medium | 103 | 17.00% |
| | Medium - Heavy | 139 | 27.00% |
| | Heavy | 184 | 23.00% |

*Projections relatively unstable, use with caution

**Figure 11 Data**

| Media Usage N-Tiles | | Index | Percentage |
|---|---|---|---|
| **Magazine** | | | |
| | Light | 109 | 32.00% |
| | Light - Medium | 102 | 12.00% |
| | Medium | 89 | 12.00% |
| | Medium - Heavy | 77 | 9.00% |
| | Heavy | 91 | 8.00% |
| **Newspaper** | | | |
| | Light | 79 | 4.00% |
| | Light - Medium | 63 | 3.00% |
| | Medium | 71 | 3.00% |
| | Medium - Heavy | 28 | 2.00% |
| | Heavy | 54 | 1.00% |
| **Radio** | | | |
| | Light | 77 | 19.00% |
| | Light - Medium | 77 | 13.00% |
| | Medium | 92 | 12.00% |
| | Medium - Heavy | 114 | 14.00% |
| | Heavy | 111 | 12.00% |
| **Television** | | | |
| | Light | 128 | 24.00% |
| | Light - Medium | 104 | 19.00% |
| | Medium | 78 | 14.00% |
| | Medium - Heavy | 67 | 12.00% |
| | Heavy | 64 | 11.00% |
| **Internet** | | | |
| | Light | 45 | 10.00% |
| | Light - Medium | 66 | 13.00% |
| | Medium | 106 | 19.00% |
| | Medium - Heavy | 130 | 28.00% |
| | Heavy | 189 | 24.00% |
| **Social Media** | | | |
| | Light | 53 | 9.00% |
| | Light - Medium | 73 | 13.00% |
| | Medium | 93 | 15.00% |
| | Medium - Heavy | 138 | 27.00% |
| | Heavy | 219 | 27.00% |

*Projections relatively unstable, use with caution

**Figure 12 Data**

| Media Usage N-Tiles | Index | Percentage |
|---|---|---|
| **Magazine** | | |
| Light | z | 31.00% |
| Light - Medium | 90 | 10.00% |
| Medium | 83 | 11.00% |
| Medium - Heavy | 85 | 10.00% |
| Heavy | 93 | 8.00% |
| **Newspaper** | | |
| Light | 94 | 5.00% |
| Light - Medium | 72 | 3.00% |
| Medium | 88 | 4.00% |
| Medium - Heavy | 40 | 3.00% |
| Heavy | 52 | 1.00% |
| **Radio** | | |
| Light | 101 | 26.00% |
| Light - Medium | 100 | 17.00% |
| Medium | 102 | 13.00% |
| Medium - Heavy | 103 | 12.00% |
| Heavy | 108 | 12.00% |
| **Television** | | |
| Light | 135 | 25.00% |
| Light - Medium | 112 | 21.00% |
| Medium | 99 | 18.00% |
| Medium - Heavy | 78 | 14.00% |
| Heavy | 62 | 10.00% |
| **Internet** | | |
| Light | 73 | 17.00% |
| Light - Medium | 92 | 18.00% |
| Medium | 109 | 19.00% |
| Medium - Heavy | 116 | 25.00% |
| Heavy | 126 | 16.00% |
| **Social Media** | | |
| Light | 78 | 13.00% |
| Light - Medium | 99 | 17.00% |
| Medium | 118 | 20.00% |
| Medium - Heavy | 126 | 24.00% |
| Heavy | 122 | 15.00% |

*Projections relatively unstable, use with caution

**Figure 14 Data**

| Media Usage N-Tiles | Index | Percentage |
|---|---|---|
| **Magazine** | | |
| Light | 95 | 28.00% |
| Light - Medium | 92 | 11.00% |
| Medium | 86 | 12.00% |
| Medium - Heavy | 107 | 12.00% |
| Heavy | 130 | 11.00% |
| **Newspaper** | | |
| Light | 97 | 5.00% |
| Light - Medium | *60 | *3.00% |
| Medium | *78 | *4.00% |
| Medium - Heavy | *24 | *1.00% |
| Heavy | *91 | *2.00% |
| **Radio** | | |
| Light | 93 | 24.00% |
| Light - Medium | 93 | 16.00% |
| Medium | 104 | 13.00% |
| Medium - Heavy | 127 | 15.00% |
| Heavy | 102 | 11.00% |
| **Television** | | |
| Light | 144 | 27.00% |
| Light - Medium | 112 | 21.00% |
| Medium | 98 | 17.00% |
| Medium - Heavy | 58 | 10.00% |
| Heavy | 63 | 11.00% |
| **Internet** | | |
| Light | 55 | 13.00% |
| Light - Medium | 66 | 13.00% |
| Medium | 100 | 17.00% |
| Medium - Heavy | 105 | 23.00% |
| Heavy | 199 | 25.00% |
| **Social Media** | | |
| Light | 57 | 9.00% |
| Light - Medium | 62 | 11.00% |
| Medium | 94 | 16.00% |
| Medium - Heavy | 119 | 23.00% |
| Heavy | 252 | 31.00% |

*Projections relatively unstable, use with caution