2024 Speed Prevention

Media Work Plan

Table of Contents

1.0 Executive Summary

The National Highway Traffic Safety Administration's (NHTSA) 2024 Speed Prevention awareness-based social norming campaign aims to inform drivers and passengers of the consequences of speeding and curb dangerous behavior. This document provides an overview of research and trends that inform NHTSA's national paid media plan for the 2024 Speed campaign.

Based on FARS data, the most significant demographic affected by fatal crashes involving speeding is 18- to 44-year-old males, making them the primary target audience for this campaign. The demographic mainly comprises two distinct generations—Gen Z, 18 to 27 years old, and Millennials, 28 to 41 years old. A small portion of the audience consists of Gen X, 42 to 44 years old.

National paid advertising will run for 24 days, beginning Monday, July 8, through Wednesday, July 31, 2024, and is supported by a $9.514 million paid media budget. The campaign will establish broad reach quickly and a high frequency to drive message penetration during the campaign. 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.

This will be balanced with innovative suggestions for additional key performance indicators (KPIs) to measure success dependent on the tactic, including increased engagement via high-impact placements measured by video completion rate (VCR), view through rate (VTR) and click-through rate (CTR) on digital assets.

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 November 2022 to November 2023 (Figure 10), 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.

In 2022, streaming budgets were increased to reflect these trends, with results that indicated increased reach and engagement. While linear (traditional) TV is still needed to reach audiences, particularly in live sports and local programming, connected TV (CTV) and over-the-top (OTT) are becoming the primary tactics to reach the target audience. This will continue to become more prominent as live sports and content previously only available on linear (traditional) TV continue to partner with streaming platforms. When allocating a balanced video plan, user-generated and video gaming content must also be considered with streaming.

Audio is another dominant consumption channel and will be a vital campaign component. Terrestrial radio continues to provide wide reach within both primary 2024 Speed generations, with significant added value. Additionally, digital audio—particularly podcasts—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 Speed 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 or adapt tactics and approaches for their campaigns.

2.0 Campaign at a Glance

2.1 Media Strategy and Goals

The 2024 Speed campaign is an awareness-based social norming national campaign to inform 18- to 44-year-old male drivers and passengers of the consequences of speeding and curb dangerous speeding behavior.

The primary media strategy is to quickly build reach and frequency to connect the target audience with our message three to five times throughout the three-week campaign. Selecting tactics that can provide audience reach while delivering audience engagement will be a KPI for campaign optimization. NHTSA will focus on quality impressions and overall campaign impact to ensure the campaign’s message engages the audience.

2.1.1 Planned Campaign Assets

Figure 1: Campaign Assets

Language	Asset Title	Types/Lengths	Additional Assets
English	Look at the Damage	Video (:30s, :15s and :06s)	Web banners (available in standard sizes)
		Audio (:30 audio spot and live reads copy :05, :10, :15, :30 and :60)	
Spanish	Ve Todo El Daño	Video (:30s, :15s and :06s)	Web banners (available in standard sizes)
		Audio (:30 audio spot and live reads copy :05, :10, :15, :30 and :60)	

2.1.2 Advertising Period

National paid advertising will start Monday, July 8, 2024, and run through Wednesday, July 31, 2024.

2.1.3 Working Media Budget

The total budget for the 2024 Speed campaign is $9.514 million.

2.1.4 Target Audience

The primary target audience is 18- to 44-year-old males. The secondary target audience is 18- to 44-year-old Hispanic males* who primarily speak and consume Spanish media at home.

**Note: In the following charts, references to “Hispanic Men,” refer to the secondary audience of those who primarily speak and consume Spanish media at home.*

3.0 Campaign Audience Trends

Young males are the most likely demographic to be involved in a fatal traffic crash where speeding is involved.[1] FARS data reveals that speeding drivers in fatal crashes were more likely to have previously recorded crashes, license suspensions, revocations and speeding convictions than non-speeding drivers. This underscores that speeding behavior can be habitual and normalized for those who do it often.

This campaign focuses on 18- to 44-year-old men because they are among the highest-volume groups involved in these speeding-related fatal crashes.[2] The campaign seeks to reach and influence these drivers through an omnichannel paid media campaign to reduce deaths and severe injuries on the nation's roadways.

Tracking overall trends in media consumption among the target audience and their shared interests, passions and affinity groups can inform tactics. The campaign aims to increase engagement and impact by connecting campaign activation to audience interests and passion points.

This media work plan also identifies delivery tactics connecting with the full breadth of the target age group for both primary and secondary audiences.

This year, 93% of the campaign's 18- to 44-year-old target audience is split between Millennials (those born between 1990–1996) and Gen Z (those born between 1997–2006).

This plan examines overall trends for the entire age demographic as well as similarities and differences between these two age groups that make up the majority of this audience, helping identify high-performing opportunities to drive reach and engagement with the campaign message.

3.1 Audience Affinities and Passion Points

While fatality data defines the age segment focus, high-reach touchpoints 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 44-year-old men, 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.

[1] https://crashstats.nhtsa.dot.gov/Api/Public/ViewPublication/813473
[2] Ibid.

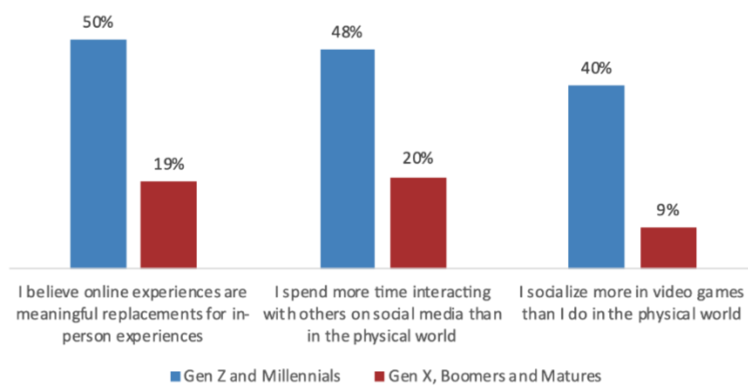
3.1.1 Online Experiences and Gaming

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 made through in-person interactions.

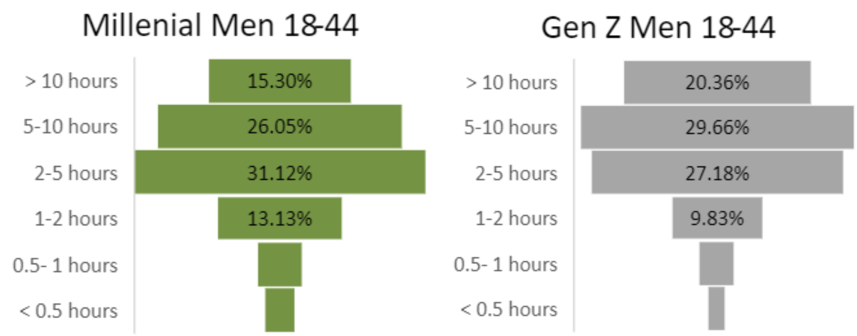
Figure 2: For Gen Z and Millennials, Online Experiences Are a Meaningful Part of Their Lives



Source: Deloitte Insights, April 2023

This trend underscores the importance of using online channels to reach the target audience effectively. Both portions of the audience spend an immense amount of time online, with nearly one-third of the overall age demographic reporting being connected five or more hours a day and one in five saying they were online 10 or more hours "yesterday" (Figure 3). With such an intense amount of time spent on these channels, social media, online video, influencer activations and video game opportunities will reach this age group where they are most active.

Figure 3: Time Spent on the Internet "Yesterday" Among Millennial and Gen Z Men in the Age Demographic



Source: 2023 Fall MRI-Simmons USA

While online experiences, in general, are important, video games hold immense influence. Most men (48%) in the target audience find video games more entertaining than television, with 38% considering video games as their primary source of entertainment. Gen Z identifies with this 12% more than Millennials, amplifying the importance of video gaming opportunities. Among the Hispanic audience, the relevance of video gaming is also very strong, with 35% identifying as "gamers."[3]

The 2024 Speed campaign will explore the activation of gaming influencers, gaming streaming platforms and large gaming events, aligning messaging with content that directly hits the primary audience interest to leverage this passion point.

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 a part of an individual's identity—"I'm a {blank} fan" becomes part of who they are.**

[3] 2023 Fall MRI-Simmons USA

Figure 4: Sports Fandom Among Millennial, Gen Z and Hispanic Men Ages 18 to 44 Years Old

	Millennial Men		Gen Z Men		Hispanic Men	
Sport	**Super Fan (%)**	**Average Fan (%)**	**Super Fan (%)**	**Average Fan (%)**	**Super Fan (%)**	**Average Fan (%)**
College Basketball	8.16%	17.26%	7.14%	14.68%	~ ~	13.64%
College Football	14.86%	18.18%	13.83%	16.09%	~ ~	13.54%
College Sports	3.09%	11.40%	3.58%	11.28%	~ ~	8.81%
Golf	3.69%	8.66%	4.43%	7.28%	~ ~	~ ~
High School Sports	4.79%	10.23%	3.95%	8.84%	~ ~	7.49%
Major League Baseball	13.09%	15.79%	11.30%	14.51%	13.34%	14.97%
NASCAR	3.93%	7.39%	3.51%	8.31%	~ ~	12.18%
NBA	14.71%	16.14%	14.03%	15.57%	12.39%	17.61%
NFL	27.37%	19.02%	22.14%	18.67%	14.65%	15.90%
NHL	8.12%	11.77%	6.60%	11.81%	5.29%	10.41%
Olympics	11.46%	24.78%	11.39%	21.58%	12.07%	23.93%
Professional Wrestling	4.42%	6.91%	4.04%	6.69%	5.59%	10.34%
International Soccer	10.09%	10.34%	10.18%	11.12%	26.97%	20.70%
MLS Major League Soccer	5.24%	9.27%	5.31%	9.86%	13.70%	13.27%
Tennis	3.79%	7.59%	3.82%	6.27%	4.97%	8.71%

Source: Source: 2023 Fall MRI-Simmons USA

Some clear leaders emerge between audience segments regarding their “super fandom” (Figure 5). Although many of the sports inspiring the greatest intensity for the general market segments—NFL, college football and NBA—are not in season during the Speed campaign, the MLB and international soccer provide opportunities to connect with the target audience using sports placements, integrations and influencers. Though a wide audience, the reach across the general market segments for average fandom of major sports stays steady across generations. When it comes to self-identifying as “super fans,” Millennials tend to have less reach across sports than the Gen Z and Gen X portions of the target audience.

A major opportunity during the 2024 Speed campaign that has wide reach across both the general and Hispanic market segments is the 2024 Summer Olympics, beginning at the tail end of the flight on July 26, 2024.

3.1.3 Pop Culture (Music and Film)

Pop culture is a powerful force shaped by trends emerging from the music, film and fashion industries. While not to be considered in a vacuum separate from sports and online/gaming experiences, these different affinities influence and compete against each other across the broader landscape.

> **More than 59% of the general market and 53% of the Hispanic target audience saw a film in a movie theater in the past six months.**

This surge demonstrates the excitement that films are still able to generate among fans, who spent more than $3.5 billion in the top 10 grossing films of 2023, with "Barbie" grossing $1 billion alone. While reserved seating reduces the amount of pre-show time spent in theaters—potentially impacting the effectiveness of direct in-theater placements—opportunities to activate messaging alongside these highly anticipated and engaged fan conversations should be thoroughly explored.

Beyond the silver screen, nearly 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 5: Audience Leisure Activity Participation

	18 to 44-Year-Olds (All)			18 to 44-Year-Olds (Hispanic)		
	Weighted Pop. (000)	**% of Target**	**Index**	**Weighted Pop. (000)**	**% of Target**	**Index**
Study Universe	58,529	100%	100	6314	100%	100
Movies/Film						
Viewed movie at the theater in the past six months	34,591	59.10%	109	3,354	53.12%	98
Music/Concerts						
Attended concert or music festival in past 12 months	16,389	28.00%	100	1,420	22.49%	80
Listened to music in the past month	26,824	45.83%	96	2,026	32.09%	67
Television/Episodic series						
I use social media to talk about shows I like	13,459	23.00%	139	1,982	31.39%	190
Agree that binge-watching is a great way to watch a series	38,412	65.63%	102	3,311	52.44%	82
Agree that "I often talk about TV shows with my friends"	29,229	49.94%	112	3,381	53.55%	120
Agree that "I like watching shows that everyone is talking about"	25,435	43.46%	108	2,873	45.50%	113

Source: 2023 Fall MRI-Simmons USA, Weight type: Population (000), Base: Study Universe

3.2 Influencer Impact

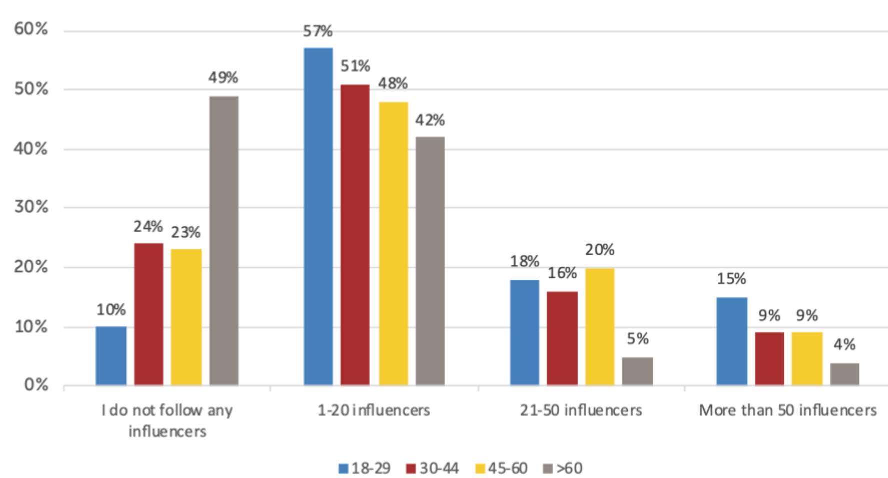
Influencers across multiple channels and passion areas have also taken center stage as important campaign ambassadors. From micro-influencers with concentrated followings in niche areas to celebrities with millions of social media followers hanging on their every word, the impact of influencer messengers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

According to eMarketer, 62% of people trust micro-influencers for news/information above other means of communication or "A-lister" influencers

The male audience turns to Facebook, X (formerly Twitter) and blogs to gain their knowledge and news. 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.[4] 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.

Figure 6: Younger Generations Follow Multiple Influencers for Entertainment and Information



Source: IZEA 2023 Influencer Marketing Study Report

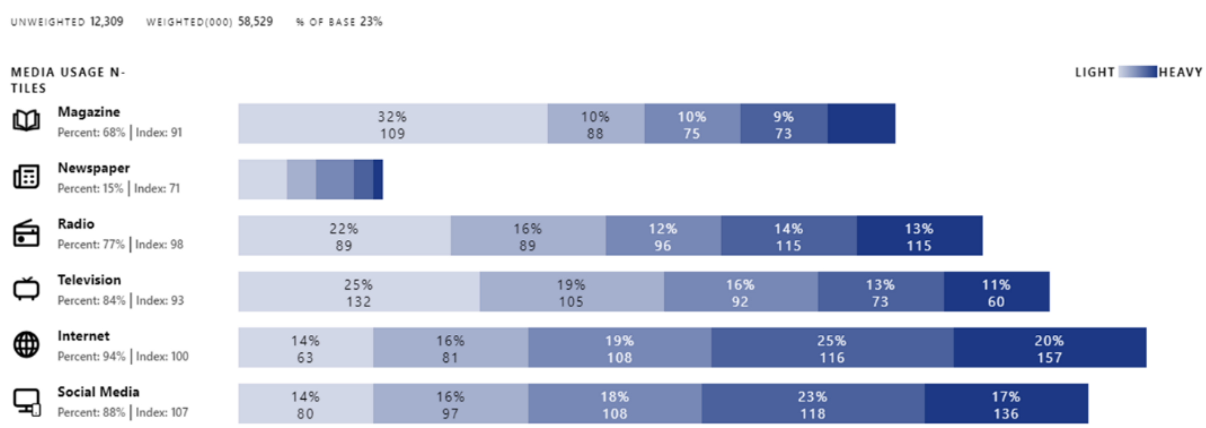
[4] 2023 Fall MRI-Simmons USA

4.0 Media Channel Trends

The 2023 Speed campaign plan began shifting to engagement KPIs focused on quality impressions versus quantity and focused 80% of the budget and tactics targeting Millennials and 20% targeting Gen Z. Considering the continued shift toward the Gen Z audience, this percentage will shift slightly in 2024 to 75% Millennials and 25% Gen Z.

Media consumption among the target audience is dominated by the internet, social media and light television delivery. These channels provide the highest reach and high concentrations of heavy usage among the target, with 20% in the highest quintile for internet usage and 17% in the top quintile for heavy social media use (Figure 7).

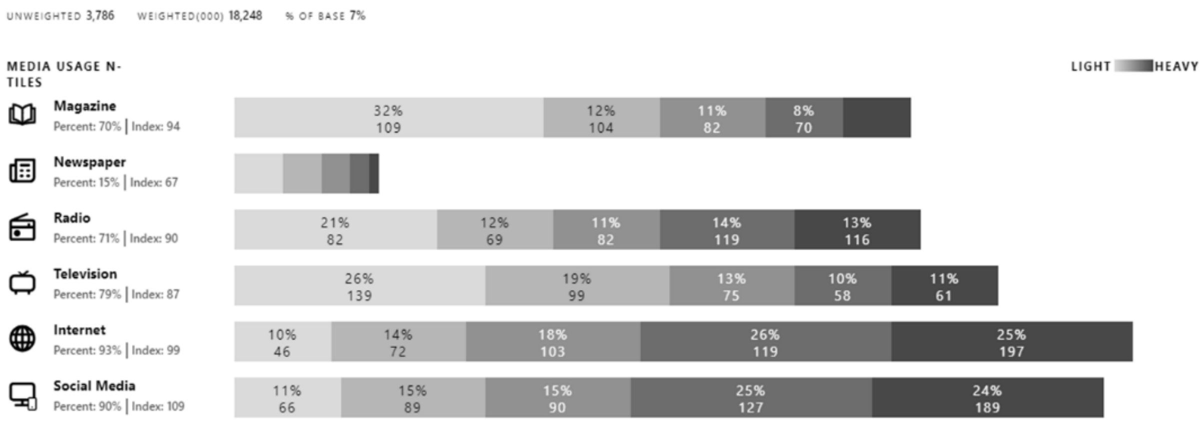
Figure 7: 18- to 44-Year-Old Male Media Usage Quintiles



Source: 2023 Fall MRI-Simmons USA, Weight type: Population (000), Base: Study Universe
**Note: Complete quintile percent and index data for Magazine and Newspaper available in section 7.0 Appendix*

When looking at just the Gen Z audience, there is heavier internet and social media usage than other adults, including Millennials. The top quintiles for Gen Z using these channels are at or near 200 compared to adults overall (Figure 8).

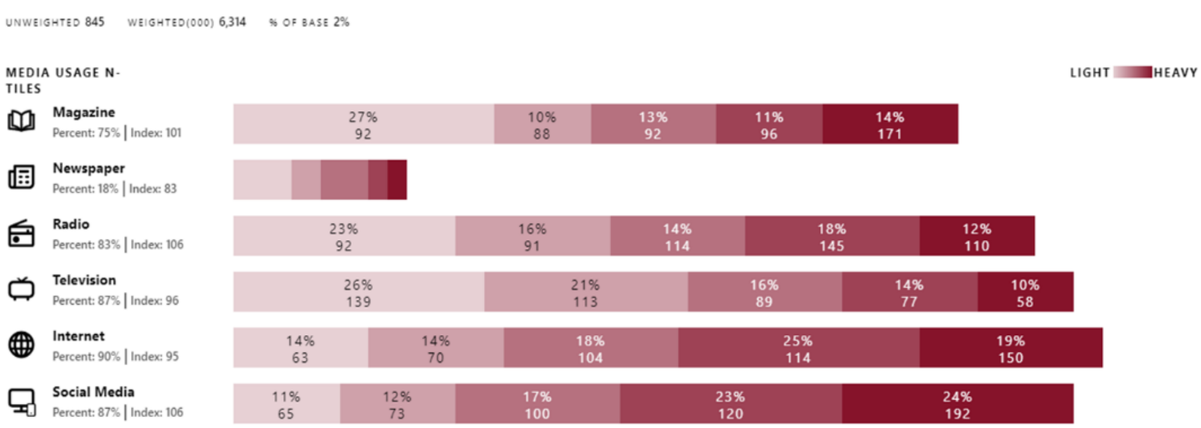
Figure 8: Gen Z 18- to 44-Year-Old Male Media Usage Quintiles



Source: 2023 Fall MRI-Simmons USA, Weight type: Population (000), Base: Study Universe
**Note: Complete quintile percent and index data for Magazine and Newspaper available in section* *7.0 Appendix*

Looking specifically at the Hispanic portion of the audience, there are very similar patterns in top usage channels (Figure 9). While the total reach for the internet and social media channels is slightly lower overall, the intensity of use in the top quintile for social is higher, at 24%. Additionally, we see slightly heavier reach of radio and television channels, which implies more of the Hispanic audience consumes traditional media than the general market.

Figure 9: 18- to 44-Year-Old Hispanic Male Media Usage Quintiles



Source: 2023 Fall MRI-Simmons USA, Weight type: Population (000), Base: Study Universe
**Note: Complete quintile percent and index data for Magazine and Newspaper available in section* *7.0 Appendix*

These high-usage channels will be prioritized for the 2024 Speed campaign to build the campaign's reach. They will be paired with high-affinity interest areas interest and audience-targeting tactics to reach the intended demographic. NHTSA plans to run video, audio and display assets and work with partners that can amplify campaign messages and materials effectively.

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.

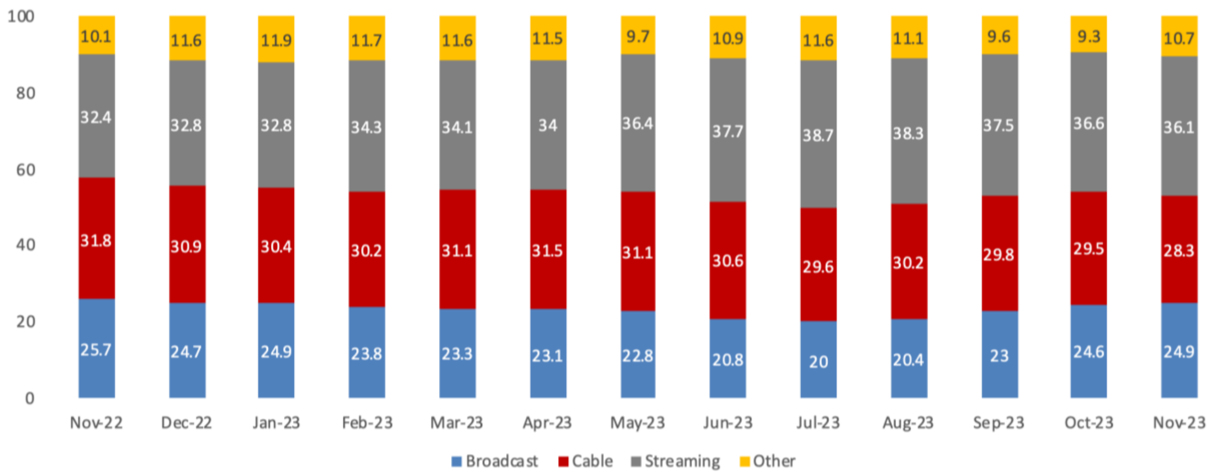
4.1.1 Linear TV, Connected TV and Streaming

In 2023, broadcast and cable viewing dropped while streaming time increased by 33.7% (Figure 10). Accordingly, NHTSA increased the Speed CTV placement budget to 14% of the overall budget. During the first year of the Speed campaign in 2022, more budget was allocated to linear (traditional) TV to provide broad reach to a new campaign. In 2023, the identified shift in broadcast viewing coupled with no major sports running in flight resulted in the shift to CTV that also included cost efficiencies and defined audience targeting—refining the message served based on the target audience's interests, lifestyle, etc., within the content they chose to consume on demand. Based on the success of this increased allocation, the 2024 campaign will again look for opportunities to increase investment in CTV tactics.

As of the latest Nielsen report (Figure 10), broadcast TV usage has slightly increased over the past few months. Programming was a key driver of the increase—high levels of interest in live sports programming (both MLB playoffs and NFL) drove a 15% increase in broadcast consumption from sports alone. With live sports being a strong driver of media consumption, viewership shifts month to month with the events.

As discussed, the key is to be aware of the shifts in viewership by platform due to reach, content and engagement and to be present where the audience is—using both linear (traditional) and streaming to complement and extend the total reach.

Figure 10: Daily TV Media Time Spent by Viewing Type (%)

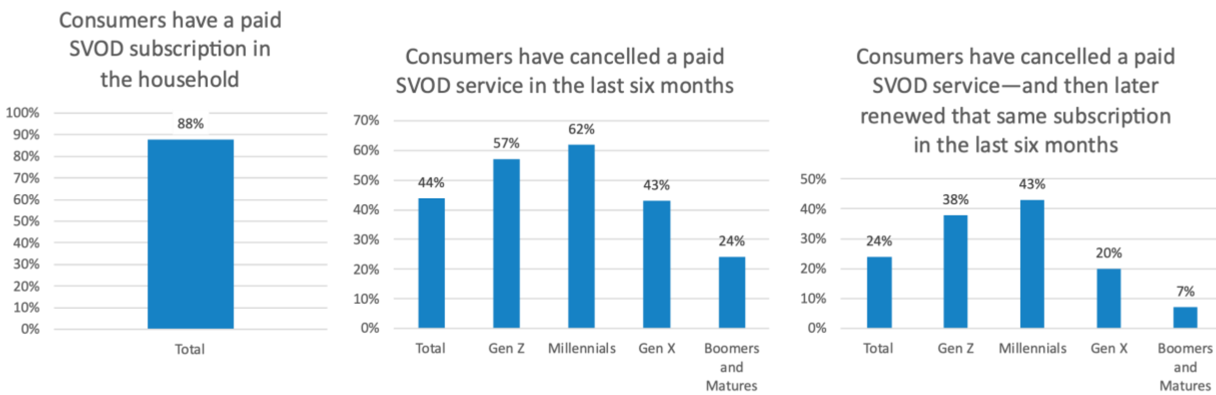


Source: Nielsen Company (U.S.), December 2023

Looking at longer-term trends, the audience continues to reduce their exclusive reliance on traditional/corded television, with only 7.2% of the overall 18- to 44-year-old male target using these channels and 49.3% relying exclusively on streaming for television content. While the Hispanic segment slightly lags behind this overall trend, only 13.1% of households in the Hispanic target audience exclusively access television content via regular/corded means (2023 Fall MRI-Simmons USA study). Surprisingly, when the older Gen X portion of this audience is considered individually, the percentage of those relying exclusively on streaming for television increases slightly by 50.7%. As the audience holistically moves increasingly toward streaming and CTV services, NHTSA's Speed campaign will move with the audience to seek the most cost-efficient and effective delivery vehicles for the campaign.

In addition to CTV opportunities, many streaming services continue to enter the marketplace, and existing providers have expanded consumer choices by adding service tiers, including advertising. This provides advertisers new access to consumers opting into these ad-supported services. The high audience use of these services offers strong rationales for increased allocation to this tactic; however, the volatility of the streaming environment due to the new options has also produced significant churn for subscribers, particularly among Millennials and Gen Z (Figure 11).

Figure 11: Paid Streaming Video On Demand Subscriptions Churn



Source: Deloitte Insights Digital Media Trends, April 2023

More than half of Gen Z and Millennials canceled a paid streaming video on demand (SVOD) service in the last six months. Many users returned to the service within six months of cancellation, underscoring the agility needed to buy on these platforms.

Users subscribe where content is fresh or exclusive to a platform (i.e., NFL Sunday Ticket is only available on YouTube TV). Streaming video consumption —and subscribers—depends on available content as younger generations rapidly shift between paid subscriptions with the most desirable content at any given time. Beyond the sprawling categories of adventure/western/sci-fi/primetime, top television content for Millennials and Gen Z centers around sports programming (Figure 12). This strong appeal may have accelerated the transition toward streaming services in 2023 as Amazon and Apple took on large live sports contracts, drawing audiences away from linear (traditional) TV services and even further into streaming.

With 2023’s writer and actor strikes lifting in November 2023, scripted content will begin an uptick in releases around the summer of 2024. This increase in new content after a lull and the competition in the 2024 election cycle must be considered when planning against both streaming and broadcast content.

Figure 12: Top TV Programming by Program Type

	18- to 44 Year-Old Hispanic Men		18- to 44 Year-Old Gen X Men		18- to 44 Year-Old Millennial Men		18- to 44 Year-Old Gen Z Men	
Program Type	***Reach (%)***	***Index***	***Reach (%)***	***Index***	***Reach (%)***	***Index***	***Reach (%)***	***Index***
	100.00%	*100*	*100.00%*	*100*	*100.00%*	*100*	*100.00%*	*100*
Football—Pro Weekend	8.79%	57	12.95%	85	17.77%	116	12.95%	85
Football Specials—Professional	6.72%	46	13.86%	95	17.35%	119	13.86%	95
Football—College Weekend	4.24%	45	8.43%	90	10.61%	113	8.43%	90
Baseball—Weekend	8.71%	96	9.34%	103	10.28%	113	9.34%	103
Baseball Specials	6.53%	72	8.33%	92	10.24%	113	8.33%	92
Football—Pro Pregame Shows	5.76%	66	8.23%	95	10.74%	124	8.23%	95
Basketball—Weekend—College	4.47%	51	8.31%	96	9.89%	114	8.31%	96
Early Morning Weekday News Programs	3.83%	64	3.96%	66	3.50%	58	3.96%	66
Early Evening Weekday News Programs	4.01%	67	4.16%	70	3.14%	53	4.16%	70
Basketball—Weekend—Professional	~ ~	~ ~	8.47%	144	9.25%	158	8.47%	144
Basketball Specials—Professional	3.60%	64	6.90%	122	8.03%	142	6.90%	122
Football Bowl Games—Specials	1.62%	30	4.71%	88	5.36%	100	4.71%	88
Horse Racing	~ ~	~ ~	2.38%	45	2.97%	56	2.38%	45
Early Evening Network News	~ ~	~ ~	2.76%	53	2.32%	44	2.76%	53
Tennis	3.61%	84	3.13%	73	3.99%	92	3.13%	73

Source: 2023 Fall MRI-Simmons USA
**Unstable projection values due to respondent count excluded*

As a whole, streaming services present tremendous opportunities and challenges for NHTSA's campaigns. With more fragmentation and audience churn, reaching scale is a larger challenge. However, for campaigns that have the agility to move with the audience, there are significant potential benefits for cost and efficiency in this increasingly streaming-forward TV environment.

4.1.2 Online Usage/Digital Video Delivery

Research shows that younger audiences engage with user-generated content (UGC) more than TV or movies. UGC is fueled by influencers with large followings and continues to increase in popularity because it is free, hyper-targeted toward specific interests and the content remains fresh and relevant. Younger generations' trust and partnership with these creators must be considered in conjunction with streaming for messaging opportunities.

YouTube is a dominating force in this space, topping the list for all audience segments for video streaming and social platforms used most often and commanding more than an hour of attention from Millennials, Gen Z and the Hispanic audience segment daily (2023 Fall MRI-Simmons USA study).

Online video opportunities extend well beyond YouTube. With so much online usage, many apps, websites and gaming devices can deliver the Speed message via digital video in the form of pre-roll, mid-roll and integrated content. These online video opportunities can also be accessed programmatically, leveraging audience targeting to deliver campaign efficiency. The 2024 campaign will explore and activate these opportunities through partners who can provide cost-effective access and engagement with the target audience.

4.2 Audio Delivery

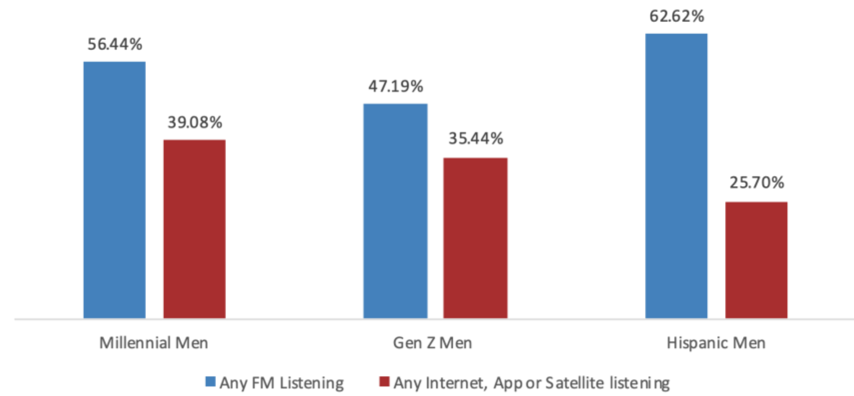
Similar to TV, audio consumption is fragmenting as digital delivery and streaming platforms lower the barrier of entry for audio providers and create new pathways for listeners to connect with content outside of terrestrial radio.

Radio reaches nearly 77% of the overall 18- to 44-year-old male audience, including streaming/apps/satellite delivery (2023 Fall MRI-Simmons USA study)**.**

While AM/FM listening overall still holds a sizable reach advantage over apps and satellite competitors, streaming audio is closing the gap.

In a reversal of the general trend, the Millennial portion of the audience is more likely to consume audio content via streaming sources than Gen Z, though they also consume more audio content overall. Small reach disparities exist between generations for FM radio as well as satellite radio. Examining the Hispanic audience, FM listening leads audio consumption by a more sizable margin (Figure 13), making it a strong tactic to continue driving awareness for the Speed message among this audience.

Figure 13: Audio Consumption by 18- to 44-Year-Old Men (Reach %, Trailing Seven Days)



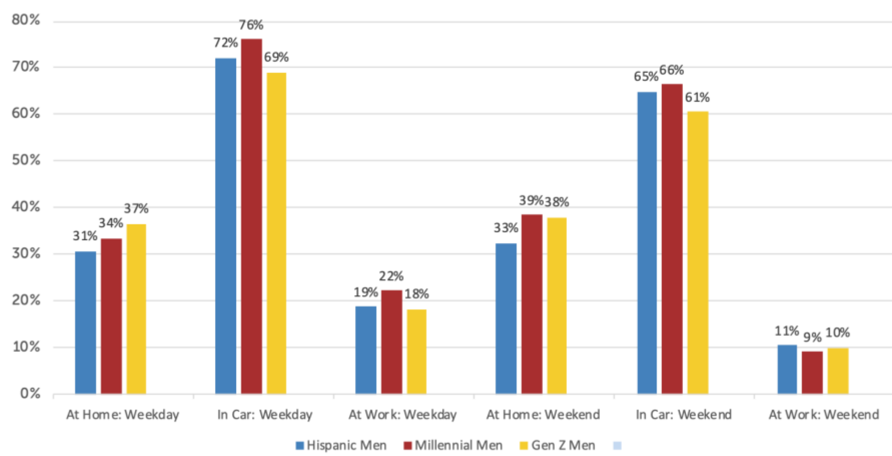
Source: 2023 Summer MRI-Simmons USA

The audience use of multiple platforms makes terrestrial radio necessary to reach all of the 2024 Speed target audiences, while streaming audio will extend the messages to reach the growing audience on those platforms.

4.2.1 Terrestrial Radio

Terrestrial (AM/FM) radio provides strong reach potential and cost-efficiency for NHTSA campaigns. With a significant portion of audio consumption happening in vehicles where the Speed message is immediately actionable, audio delivery via terrestrial radio and streaming options remains an important foundational channel for the campaign.

Figure 14: Audio Reach by 18- to 44-Year-Old Men, by Location (%)



Source: 2023 Fall MRI-Simmons USA, Weight type: Population (000), Base: Study Universe

Research shows which terrestrial radio formats draw in each 2024 Speed generation. Of Millennial males, 14% listen to contemporary hit radio (CHR), with adult contemporary (AC) coming in second at 8.3%. CHR programming and AC also perform well for Gen Z men and the Hispanic target audience (Figure 15).

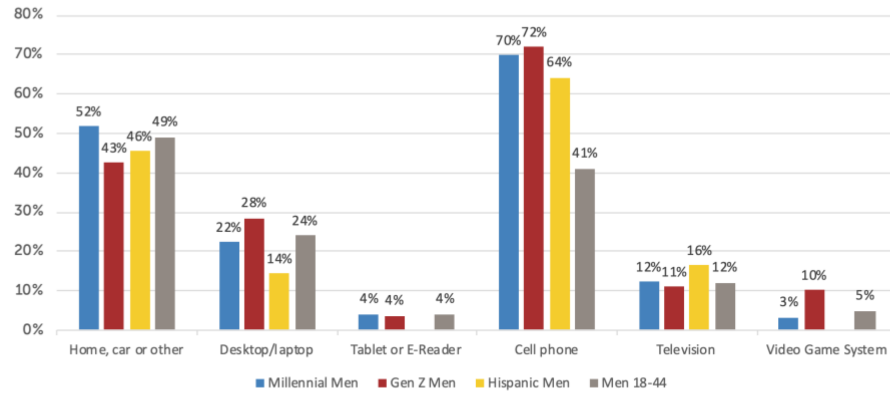
Figure 15: Top Radio Formats by Segment, 18- to 44-Year-Old Males

	18 to 44-Year-Old Millennial Men		18 to 44-Year-Old Gen Z Men		18 to 44-Year-Old Hispanic Men Who Primarily Speak Spanish at Home	
Format	***Reach (%)***	***Index***	***Reach (%)***	***Index***	***Reach (%)***	***Index***
CHR	14.06%	128	12.96%	118	14.16%	129
Adult contemporary	8.33%	83	7.27%	72	7.38%	74
Urban	8.33%	112	1.69%	63	~ ~	~ ~
Urban Contemporary	6.48%	129	6.28%	129	~ ~	~ ~
Hispanic	5.64%	122	3.66%	79	29.35%	635
Rock	5.16%	147	2.83%	80	~ ~	~ ~
Alternative	5.06%	130	2.29%	59	~ ~	~ ~
Religion/Christian	4.98%	80	3.76%	60	7.46%	119
Sports	3.94%	127	2.20%	72	~ ~	~ ~
Rythmic	3.53%	144	3.64%	148	~ ~	~ ~
Mexican/Tejano/Ranchera	2.75%	137	1.41%	70	13.97%	695
Spanish AC	1.56%	120	*	NA	8.52%	655
Tropical	1.01%	133	*	NA	~ ~	~ ~

Source: 2023 Fall MRI-Simmons USA, Weight type: Population (000), Base: Study Universe
**Unstable projection values due to respondent count excluded*

Around 71% of 18- to 44-year-old males listen to audio on cell phones and smartphones. Audio listeners use smartphones the most by a wide margin. However, the audience also listens on devices within the home, car and other (including smart devices) at around 49% and personal computers at 24% (Figure 16). Terrestrial radio buys can reach these devices through individual radio streaming services as a counterpart to the network buy. Large radio networks can also be reached through Google Home/Alexa devices to extend the buy to devices outside the car and personal radios.

Figure 16: Audio Listening, 18- to 44-Year-Old Males



Source: 2023 Fall MRI-Simmons USA
**Unstable projection values due to respondent count excluded*

For the Hispanic audience, the audio strategy will focus on terrestrial radio with digital audio extensions, given its higher audience reach and opportunity to promote a strong presence across multiple networks, driving awareness during the Hispanic target's key listening times and formats. The Hispanic format category includes subsets like Hispanic, regional Mexican, CHR and Spanish AC, which will be a must in the radio strategy to reach the Hispanic male listener.

The plan will explore opportunities for all audience segments to leverage radio talent to deliver the campaign message. Radio networks will be challenged to integrate their on-air talent into the plans, especially within genres popular with each target audience segment. These extensions will capitalize on trusted local voices to deliver NHTSA's message.

4.2.2 Streaming Audio

During the 2023 Speed campaign, playlist sponsorships targeting gamers showed high levels of engagement three to five times benchmarks. While there were challenges in identifying playlist sponsorships that could precisely target the target demographic and meet brand-safety requirements, the 2024 plan should still consider high engagement with playlist sponsorships for targeting purposes.

Spotify leads market reach for each Speed audience, followed by Pandora, Apple Music and Amazon Music, depending on the segment of the audience. Echoing the UGC trend observed in Section 4.1.2 Online Usage/Digital Video Delivery, SoundCloud is third in terms of reach for Gen Z, connecting with 13% of the audience in the past 30 days (Figure 17) and hitting an exceedingly high index of 384.

Figure 17: Music or Audio Service Used in Past 30 Days

	18- 44- Year Old Millennial Men		18- 44- Year Old Gen Z Men		18-44- Year Old Hispanic Men Who Speak Spanish at Home*	
Music or Audio Service	**Reach (%)**	**Index**	**Reach (%)**	**Index**	**Reach (%)**	**Index**
Spotify	42.31%	133	57.05%	179	48.53%	152
Pandora	20.89%	100	11.62%	56	16.61%	79
Apple Music	18.43%	114	27.44%	169	19.34%	119
Amazon Prime Music or Amazon Music Unlimited	18.13%	106	10.31%	60	12.75%	74
iTunes	7.47%	98	6.23%	82	5.57%	73
iHeartRadio	6.28%	76	4.48%	55	~ ~	~ ~
Audible	5.01%	132	3.36%	88	~ ~	~ ~
SoundCloud	4.23%	125	13.04%	384	~ ~	~ ~
Shazam	4.06%	121	5.26%	157	~ ~	~ ~
TuneIn	1.25%	94	~ ~	~ ~	~ ~	~ ~
Tidal	1.06%	180	~ ~	~ ~	~ ~	~ ~
Audacy	0.80%	111	~ ~	~ ~	~ ~	~ ~

Source: 2023 Fall MRI-Simmons USA, Weight type: Population (000), Base: Study Universe
**Unstable projection values due to respondent count excluded*

The 2024 Speed campaign will include a blend of streaming audio and podcasts as podcasts also resonate with Millennial and Gen Z male audiences. The highest-indexing podcasts for this group include comedy, sports and entertainment/pop culture. NHTSA will continue to identify brand-safe, captivating content programming to disseminate its messaging.

Figure 18: Type of Podcast Listened to in the Past 30 Days

	18 to 44-Year-Old Millennial Men		18 to 44-Year-Old Gen Z Men		18 to 44-Year-Old Hispanic Men Who Primarily Speak Spanish at Home	
Podcast Genre	**Reach (%)**	**Index**	**Reach (%)**	**Index**	**Reach (%)**	**Index**
Comedy	12.04%	163	13.06%	177	9.25%	125
Politics	8.76%	157	8.26%	148	6.15%	110
Sports	8.66%	228	7.14%	188	~ ~	~ ~
Entertainment/Pop Culture	8.26%	139	9.27%	156	6.68%	113
News/Current Events	7.85%	128	8.24%	134	5.38%	88
Crime/Investigative Reporting	6.74%	103	6.07%	93	~ ~	~ ~
History	6.30%	158	5.36%	134	5.64%	141
Business/Finance	5.77%	152	4.47%	117	~ ~	~ ~
Education	5.77%	151	4.56%	119	~ ~	~ ~
Arts/Culture	5.72%	143	5.24%	131	~ ~	~ ~
Religion/Spirituality	5.38%	104	4.41%	95	~ ~	~ ~
Music	4.32%	146	5.34%	181	6.91%	234
Science	4.25%	147	4.01%	139	~ ~	~ ~
Health/Fitness/Lifestyle	3.99%	95	4.09%	98	~ ~	~ ~
Technology	3.93%	205	3.16%	165	~ ~	~ ~

Source: 2023 Fall MRI-Simmons USA, Weight type: Population (000), Base: Study Universe
**Unstable projection values due to respondent count excluded*

4.3 Out-of-Home

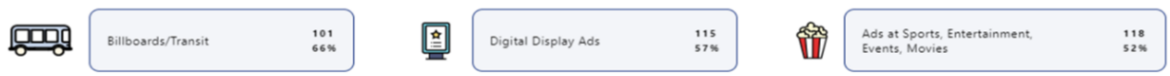
Out-of-home (OOH) media extends the campaign message beyond the audience's screen and provides a last line of defense to encourage safe speeds. Speed messaging will be strategically placed where the target demographic spends most of their time in locations that are relevant to their affinities during this flight period.

OOH media still resonates with 18- to 44-year-old males; billboards reach 66% of the target audience, while digital ads reach 57% (Figure 19).

The 2024 Speed campaign once again runs in the middle of the summer, when the target is more likely to be out and about, making OOH an effective tactic to reach them on the move.

The 2024 Speed campaign will also explore digital OOH (DOOH) placements for the Hispanic male audience, which has an even higher reach and index than the general market audience for DOOH display ads. The flexibility to activate DOOH during short flights drives efficiency for the Speed campaign, targeting the Speed message during peak drive times. Locations with considerable reach and visibility will be prioritized for more efficient CPMs.

Figure 19: OOH Video Ads Seen in the Last 30 Days by 18- to 44-Year-Old Males



Source: 2023 Fall MRI-Simmons USA

Figure 20: OOH Video Ads Seen in the Last 30 Days by 18- to 44-Year-Old Hispanic Males

Source: 2023 Fall MRI-Simmons USA

4.4 Digital Display

Digital display capitalizes and builds on the online usage trends discussed in Section 4.0 Media Channel Trends and Section 4.1 Video Delivery. In addition to the video-based delivery, programmatic buying will offer opportunities to connect static and interactive digital display assets to the target audience where they spend time on the internet. Programmatic digital display will add cost-effective reach to the Speed audience to lower the overall CPM of the campaign while also making room to activate custom ideas via publisher direct placements in high-indexing sites, delivering targeted reach around audience passion points.

Millennials and Gen Z's preferences and habits when consuming online content can be derived by tracking their interests (see Section 2.0 Campaign at a Glance) and exploring these passions in niche publications and websites. By identifying and partnering with publishers whose offerings resonate with the target, NHTSA will explore setting up direct buys with sites with high audience concentration and interest.

The Hispanic 2024 Speed plan will also include a programmatic component extended to websites the target audience visits beyond what is included in the publisher direct buy. The messaging will reach the audience programmatically with targeted ads via video and display ads on multiple screens. Programmatic audio units will also be implemented to drive high listen rates. While the Hispanic target audience is proportionally smaller than the general population, there is little difference in programmatic consumption between these two audiences—the same general market streaming services/apps may provide opportunities to connect with the Hispanic target audience. The campaign will also leverage native placements across Spanish-language apps and sites to increase reach and drive website visits to a dedicated page.

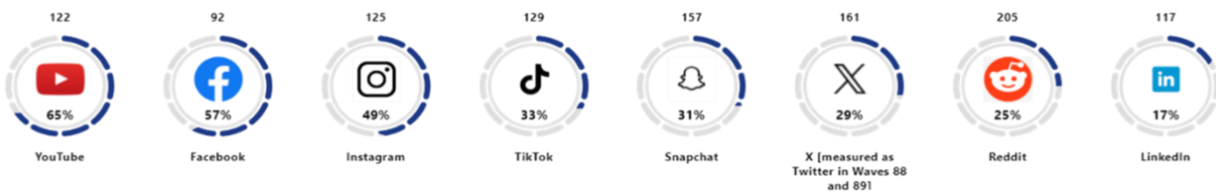
4.5 Paid Social Media

Social media is a primary source of entertainment and communication for 18- to 44-year-old males.

Looking at the top eight social media platforms of the 18- to 44-year-old demographic, over 50% of both the general and Hispanic market uses Instagram, Facebook and YouTube (Figure 21).

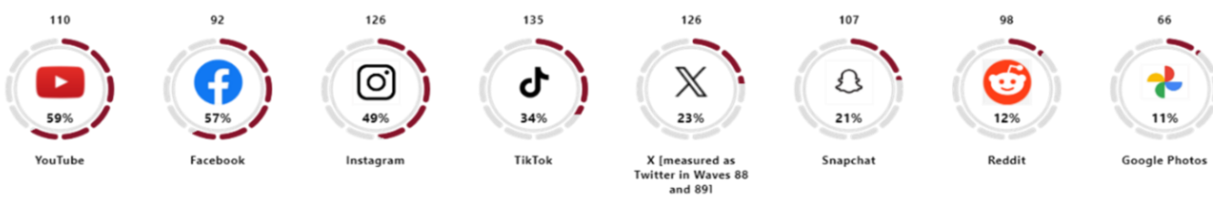
This is the first year we have seen YouTube in the top position; it has become a platform for user engagement, not just a place to watch videos.

Figure 21: Top Social Media Services (Reach and Index) 18- to 44-Year-Old Males
Top Number—Index | Bottom Number—Reach (%)



Source: 2023 Fall MRI-Simmons USA

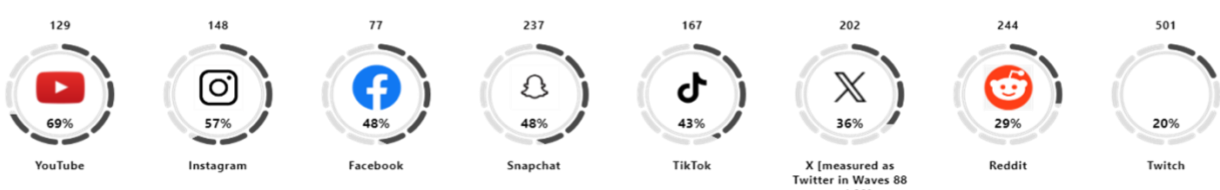
Figure 22: Top Social Media Services (Reach and Index) Hispanic 18- to 44-Year-Old Males
Top Number—Index | Bottom Number—Reach (%)



Source: 2023 Fall MRI-Simmons USA

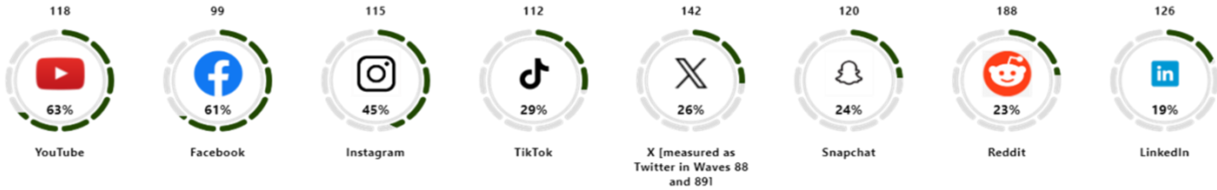
In comparing social media preferences between the male Gen Z and Millennial audiences, YouTube remains the top social channel, with Millennials preferring Facebook over Instagram as the second social channel of choice. Of the social channels that NHTSA has activated against, X (formerly Twitter) ranks third with both audiences, showing more reach than TikTok.

Figure 23: Top Social Media Services (Reach and Index) Gen Z Males
Top Number—Index | Bottom Number—Reach (%)



Source: 2023 Fall MRI-Simmons USA

Figure 24: Top Social Media Services (Reach and Index) Millennial Males Top Number—Index | Bottom Number—Reach (%)



Source: 2023 Fall MRI-Simmons USA

Historically, NHTSA has activated campaigns across YouTube, Facebook, Instagram, X (formerly Twitter) and Twitch. Research shows the target audience can still be reached through those platforms; however, as Gen Z ages more into the Speed target demographic, NHTSA will continue to track social media trends, especially as platforms like Facebook drop in popularity with the younger generations and destinations like Twitch grow.

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 linear (traditional) and programmatic TV, and CTV/OTT and online video to reach the target audience with entertainment and non-sports programming. This will run on appropriate cable inventory, network apps via full episode players and OTT services and across the web. The state-level plans can build off this base by including broadcast TV programming that efficiently reaches the target audience, including cable if penetration is sufficient, and geotargeting any problem areas in their local markets.

Audio

The audio plan includes both terrestrial and digital audio and may run in the 50 GRPs/week range. At the national level, audio 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.

Digital Display

The target audience uses digital media heavily, and a digital display effort should be a significant part of state-level plans. This can include using publisher-direct efforts outside of those sites on the national plan and display.

Paid Social Media

Social media also plays a significant role in the life of the target audiences and is recommended for state-level plans. Social media plans can include video and/or display creative and are a good complement to enhance reach and engagement for the campaign.

Out-of-Home

One of the main benefits of OOH advertising is its ability to reach a large audience and be seen by anyone who passes by an ad. OOH offers the ability to reach people with NHTSA messaging throughout their day and perhaps in critical moments while they are actively driving. OOH should be considered to extend the reach and amplify awareness of NHTSA messaging on state-level plans.

Rural Markets

If state-specific data indicates that the Speed 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, audio 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 standalone 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 7 Data

Media Usage N-Tiles		Index	Percentage
Magazine			
	Light	109	32.00%
	Light–Medium	88	10.00%
	Medium	75	10.00%
	Medium–Heavy	73	9.00%
	Heavy	86	7.00%
Newspaper			
	Light	98	5.00%
	Light–Medium	72	3.00%
	Medium	88	4.00%
	Medium–Heavy	39	2.00%
	Heavy	57	1.00%
Radio			
	Light	89	22.00%
	Light–Medium	89	16.00%
	Medium	96	12.00%
	Medium–Heavy	115	14.00%
	Heavy	115	13.00%
Television			
	Light	132	25.00%
	Light–Medium	105	19.00%
	Medium	92	16.00%
	Medium–Heavy	73	13.00%
	Heavy	60	11.00%
Internet			
	Light	63	14.00%
	Light–Medium	81	16.00%
	Medium	108	19.00%
	Medium–Heavy	116	25.00%
	Heavy	157	20.00%
Social Media			
	Light	80	14.00%
	Light–Medium	97	16.00%
	Medium	108	18.00%
	Medium–Heavy	118	23.00%
	Heavy	136	17.00%

*Projections relatively unstable, use with caution

© MRI-Simmons, 2024. Proprietary and Confidential.

Figure 8 Data

Media Usage N-Tiles	Index	Percentage
Magazine		
Light	109	32.00%
Light–Medium	104	12.00%
Medium	82	11.00%
Medium–Heavy	70	8.00%
Heavy	82	7.00%
Newspaper		
Light	102	5.00%
Light–Medium	79	4.00%
Medium	74	3.00%
Medium–Heavy	25	2.00%
Heavy	65	1.00%
Radio		
Light	82	21.00%
Light–Medium	69	12.00%
Medium	82	11.00%
Medium–Heavy	119	14.00%
Heavy	116	13.00%
Television		
Light	139	26.00%
Light–Medium	99	19.00%
Medium	75	13.00%
Medium–Heavy	58	10.00%
Heavy	61	11.00%
Internet		
Light	46	10.00%
Light–Medium	72	14.00%
Medium	103	18.00%
Medium–Heavy	119	26.00%
Heavy	197	25.00%
Social Media		
Light	66	11.00%
Light–Medium	89	15.00%
Medium	90	15.00%
Medium–Heavy	127	25.00%
Heavy	189	24.00%

*Projections relatively unstable, use with caution

© MRI-Simmons, 2024. Proprietary and Confidential.

Figure 9 Data

Media Usage N-Tiles		Index	Percentage
Magazine			
	Light	92	27.00%
	Light–Medium	88	10.00%
	Medium	92	13.00%
	Medium–Heavy	96	11.00%
	Heavy	171	14.00%
Newspaper			
	Light	*118	*6.00%
	Light–Medium	*77	*3.00%
	Medium	*109	*5.00%
	Medium–Heavy	*31	*2.00%
	Heavy	*109	*2.00%
Radio			
	Light	92	23.00%
	Light–Medium	91	16.00%
	Medium	114	14.00%
	Medium–Heavy	145	18.00%
	Heavy	110	12.00%
Television			
	Light	139	26.00%
	Light–Medium	113	21.00%
	Medium	89	16.00%
	Medium–Heavy	77	14.00%
	Heavy	58	10.00%
Internet			
	Light	63	14.00%
	Light–Medium	70	14.00%
	Medium	104	18.00%
	Medium–Heavy	114	25.00%
	Heavy	150	19.00%
Social Media			
	Light	65	11.00%
	Light–Medium	73	12.00%
	Medium	100	17.00%
	Medium–Heavy	120	23.00%
	Heavy	192	24.00%

*Projections relatively unstable, use with caution

© MRI-Simmons, 2024. Proprietary and Confidential.