2024 Click It or Ticket

Media Work Plan

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1.0 Executive Summary

The National Highway Traffic Safety Administration's (NHTSA) 2024 Click It or Ticket (CIOT) high-visibility enforcement (HVE) campaign aims to get drivers to wear seat belts during a national enforcement mobilization. This document provides an overview of the research and trends that inform NHTSA's national paid media plan for the 2024 CIOT campaign.

Based on FARS data, the most significant demographic involved in fatal crashes involving an unbelted person is 18- to 34-year-old males, making them the primary target audience 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.

National paid advertising will run for 21 days, beginning Monday, May 13, through Sunday, June 2, 2024, and is supported by a $11.2 million paid media budget. The campaign will establish a 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 five to seven 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) 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 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.

In 2022, streaming budgets were increased to reflect these trends, with results that indicated increased reach and engagement. While linear 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 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 2024 CIOT 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 CIOT 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 CIOT campaign aims to encourage increased seat belt use by reminding 18- to 34-year-old male drivers—those most likely to be involved in a fatal unrestrained crash—about seat belt laws and increased nationwide law enforcement during the campaign.

The national buy will include a geotargeted focus for the 2024 campaign in states where unbelted fatalities are the highest: D.C., Conn., Maine, Ga., Ill., Kan., Ky., N.J., Wis., Ala., Del., Okla., S.C., Ark., La., N.M., Hawaii, Mo. and N.H. The geotarget will also include secondary states: Va., N.D., Colo., Mass., Neb., Ariz., Pa., Ohio, Idaho, Vt., Wyo., Mont. and S.D.

The primary media strategy is to quickly build reach and frequency to connect the target audience with our message five to seven 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

<table>
<tr><th>Language</th><th>Asset Title</th><th>Type/Lengths</th><th>Additional Assets</th></tr>
<tr><td>English</td><td>Two Guys</td><td rowspan="2">Video (:30s, 15s, :06s)

Audio (:30s audio spot and live reads copy :05, :10, :15, :30 and :60)</td><td rowspan="2">Web banners (available in standard sizes)</td></tr>
<tr><td>Spanish</td><td>Dos Segundos</td></tr>
<tr><td>English</td><td>It's No Game</td><td>Digital Video (:30s, :15s, :06s)</td><td>N/A</td></tr>
</table>

2.1.2 Advertising Period

National paid advertising will start Monday, May 13, 2024, and run through Sunday, June 2, 2024.

2.1.3 Working Media Budget

The total budget for the 2024 CIOT campaign is $11.2 million.

2.1.4 Target Audience

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

3.0 Campaign Audience Trends

More than half of the men killed on the nation's roadways in 2021 were unrestrained.[1] The CIOT campaign focuses on 18- to 34-year-old men because they are among the highest-volume groups involved in these unrestrained fatal crashes. 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. We aim 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. In 2024, the 18- to 34-year-old target audience for the campaign is split between Millennials (those born between 1990–1996) and Gen Z (those born between 1997–2006). This plan examines overall trends for the age demographics as well as similarities and differences between these two age groups, 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.

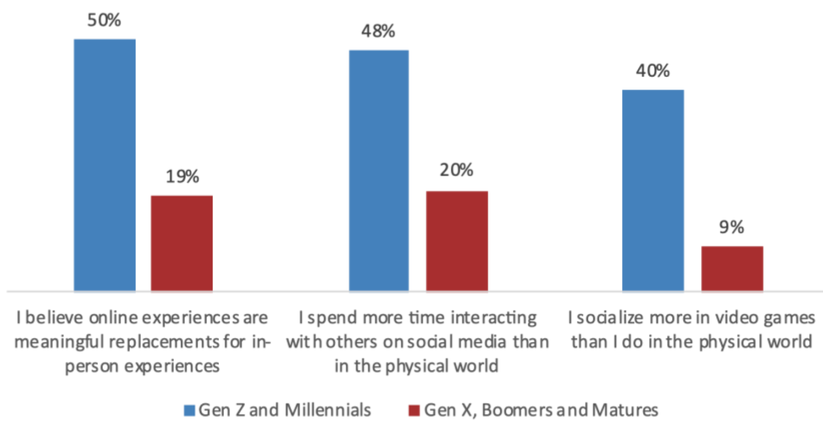
Among 18- to 34-year-old men, three areas emerge as key passion points for campaign engagement: online experiences and gaming, sports, and music and film. Each area reaches the overall age segment differently, providing strong platforms to connect safety messaging with the audience.

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.

[1] https://crashstats.nhtsa.dot.gov/Api/Public/ViewPublication/813449

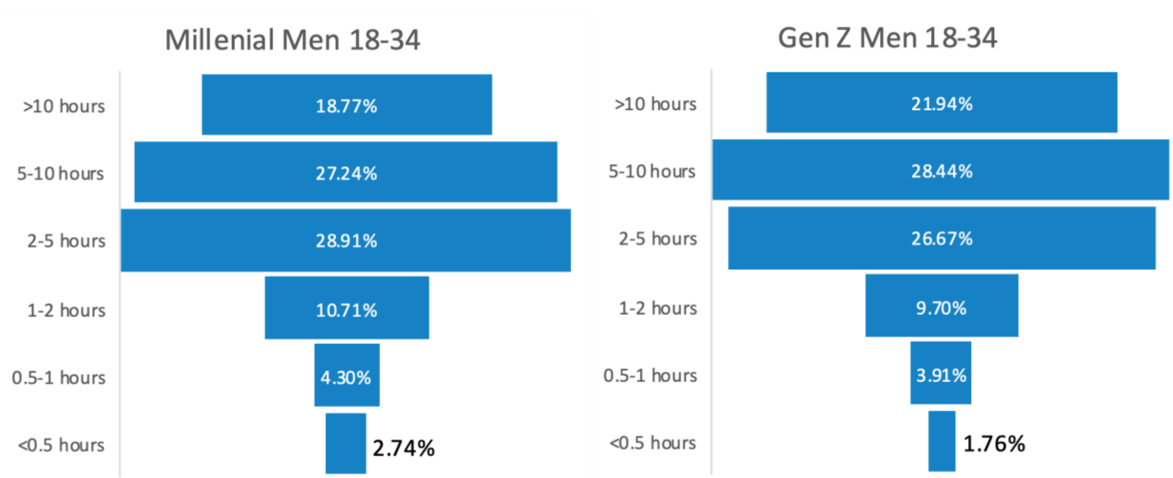
Figure 2: For Gen Z and Millennials, Online Experiences Are a Meaningful Part of Their Lives



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 half 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 Summer MRI-Simmons USA

While online experiences, in general, are important, video games hold immense influence. Most men (52.4%) in the target audience find video games more entertaining than television, with more than four in 10 considering video games as their primary source of entertainment. Gen Z identifies with this 5–10% more than Millennials, amplifying the importance of video gaming opportunities. Among the Hispanic audience, the relevance of video gaming is also very strong, with one-third identifying as "gamers."[2]

The 2024 CIOT campaign will explore the activation of gaming influencers, gaming streaming platforms and large gaming events, aligning messaging with content that directly hits a 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.

Figure 4: Sports Fandom Among Millennial, Gen Z and Hispanic Men Ages 18 to 34 Years Old

	Millennial Men		Gen Z Men		Hispanic Men	
Sport	**Super Fan (%)**	**Average Fan (%)**	**Super Fan (%)**	**Average Fan (%)**	**Super Fan (%)**	**Average Fan (%)**
College Basketball	7.0%	17.7%	6.4%	15.7%	2.9%	10.4%
College Football	12.7%	17.7%	13.7%	16.9%	6.5%	8.3%
Other College Sports	3.6%	9.7%	4.5%	9.8%	2.8%	8.2%
Golf	3.8%	7.6%	4.6%	7.7%	2.0%	3.6%
High School Sports	3.9%	8.9%	4.3%	8.6%	3.1%	7.2%
MLB	11.0%	14.5%	10.8%	15.3%	7.8%	16.7%
NASCAR	3.9%	6.7%	4.0%	8.2%	2.8%	6.8%
NBA	14.6%	16.0%	13.4%	15.9%	7.0%	21.6%
NFL	25.1%	18.0%	21.5%	18.4%	9.7%	15.0%
NHL	7.7%	11.7%	7.3%	11.7%	4.3%	9.2%
Olympics	9.4%	22.7%	10.4%	21.2%	8.4%	21.3%
Professional Wrestling	4.7%	6.2%	4.8%	6.1%	6.6%	6.3%
International Soccer	10.9%	8.9%	9.6%	10.4%	26.2%	14.5%
MLS	5.5%	7.7%	5.3%	8.1%	9.5%	12.8%
Tennis	3.8%	7.3%	4.4%	6.4%	5.1%	8.4%

Source: 2023 Summer MRI-Simmons USA

[2] 2023 Summer MRI-Simmons USA

Some clear leaders emerge between audience segments regarding their "super fandom" (Figure 4). Although two of the sports inspiring the greatest intensity for the general market segments—NFL and college football—are not in season during the CIOT campaign, the NBA, MLB and international soccer provide opportunities to connect with the target audience using sports placements, integrations and influencers.

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.

More than 57% of the general market and 55% of the Hispanic target audience saw a film in a movie theater in the past six months. 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. 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 34-Year-Olds (All)			18- to 34-Year-Olds (Hispanic)		
	Weighted Pop. (000)	**% of Target**	**Index**	**Weighted Pop. (000)**	**% of Target**	**Index**
Study Universe	***37,239***	***100.00%***	***100***	***3,818***	***100.00%***	***100***
Movies/Film						
Viewed movie at a theater in past six months	21,590	57.9%	110	2,107	55.19%	105
Music/Concerts						
Attended concert or music festival in past 12 months	10,011	26.88%	100	843	22.08%	82
Listened to music in past month	16,876	45.32%	94	1,067	27.95%	58
Television/Episodic Series						
I use social media to talk about shows I like	9,301	24.98%	151	1,335	34.97%	212
Agree that binge-watching is a great way to watch a series	23,856	64.06%	100	1,951	51.10%	80
Agree that "I often talk about TV shows with my friends"	18,740	50.32%	112	1,859	48.69%	108
Agree that "I like watching shows that everyone is talking about"	16,634	44.67%	111	1,579	41.36%	103

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

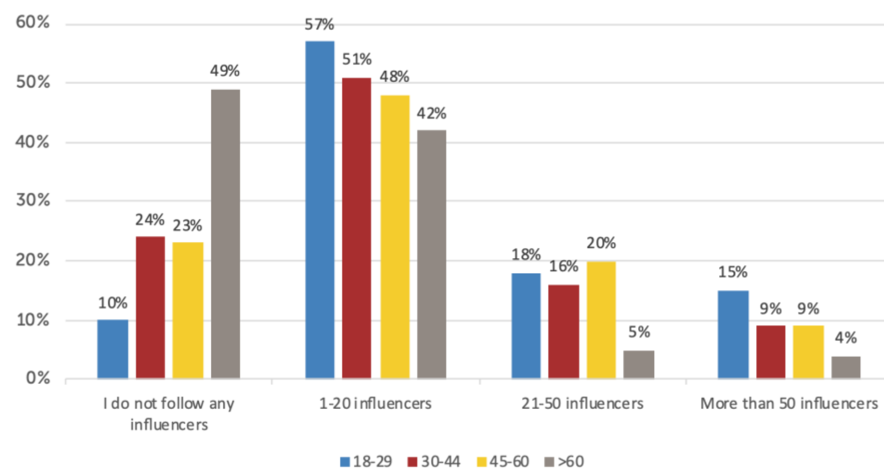
3.2 Influencer Impact

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. 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



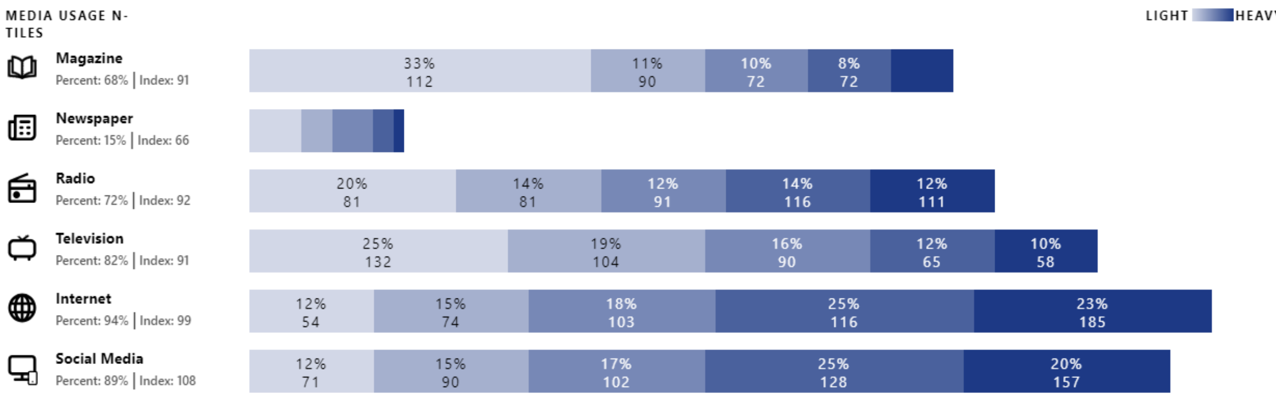
Source: IZEA 2023 Influencer Marketing Study Report

4.0 Media Channel Trends

In 2023, the CIOT campaign allocated 50% of the budget to activities targeting the male 18- to 34-year-old audience. It used the remaining budget on tactics that spoke to each generation by following their interest and media consumption habits. Approximately 35% of the budget focused on Millennial males and 15% on Gen Z males. Considering the continued shift toward the Gen Z audience, this percentage will shift slightly in 2024 to allocate 20% of the budget to focus on Gen Z and 30% toward Millennials.

Media consumption among the target audience is dominated by the internet, social media and television delivery. These channels provide the highest reach and high concentrations of heavy usage among the target, with 23% in the highest quintile for internet usage and 20% in the top quintile for heavy social media use (Figure 7).

Figure 7: 18- to 34-Year-Old Media Usage Quintiles

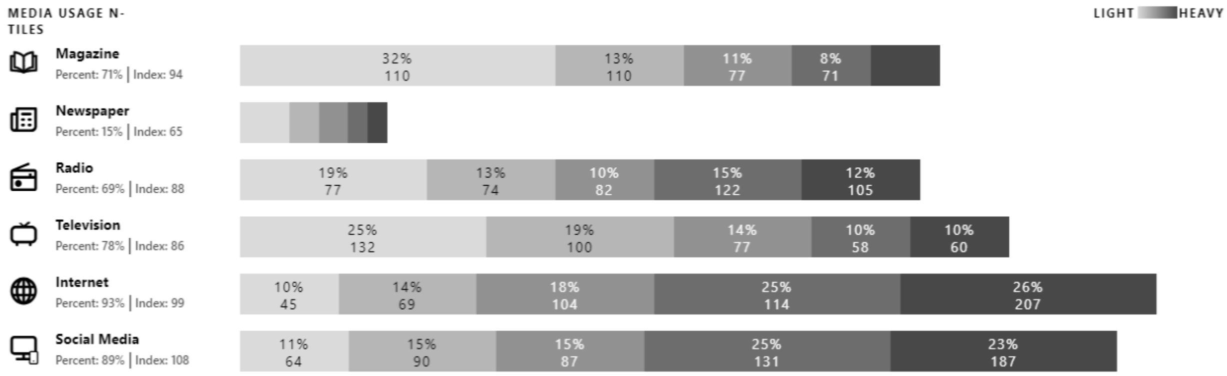


Source: 2023 Summer MRI-Simmons USA, Weight type: Population (000), Base: Study Universe

**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 34-Year-Old Media Usage Quintiles

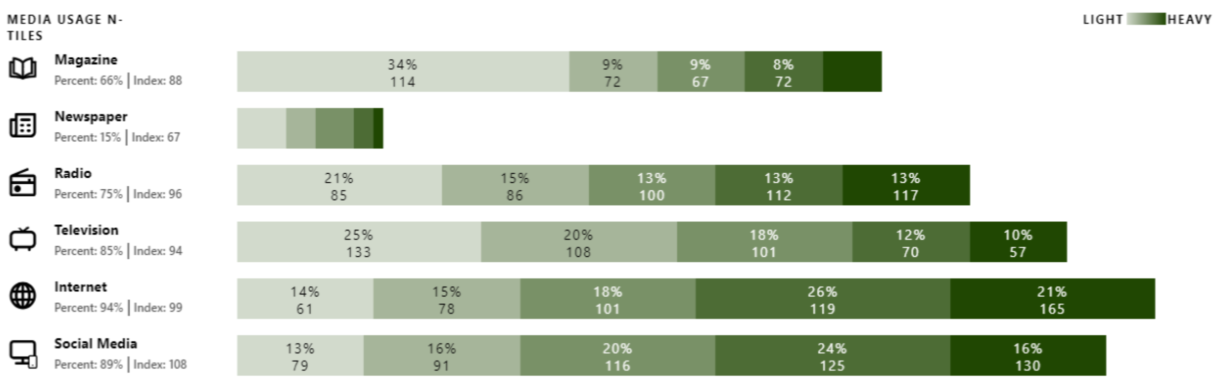


Source: 2023 Summer MRI-Simmons USA, Weight type: Population (000), Base: Study Universe

**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 is higher, at 28%. Additionally, we see slightly heavier use of nearly every channel measured by the survey compared to the general market audience, which implies the Hispanic audience consumes media a little more throughout the day than the general market.

Figure 9: 18- to 34-Year-Old Hispanic Media Usage Quintiles



Source: 2023 Summer 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 CIOT 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 direct partners that can amplify campaign messages and materials effectively.

4.1 Video Delivery

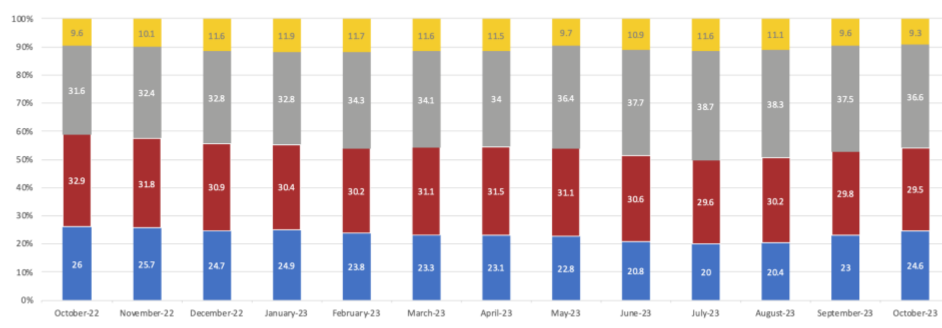
Many devices—television sets, tablets, computers, handsets and even gas station screens—can be used to connect with audiences consuming increasing amounts of video content via a widening array of platforms. This section explores video consumption habits across the device ecosystem.

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 CIOT CTV placement budget to 13% of the overall budget. The results of this shift 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 (%)

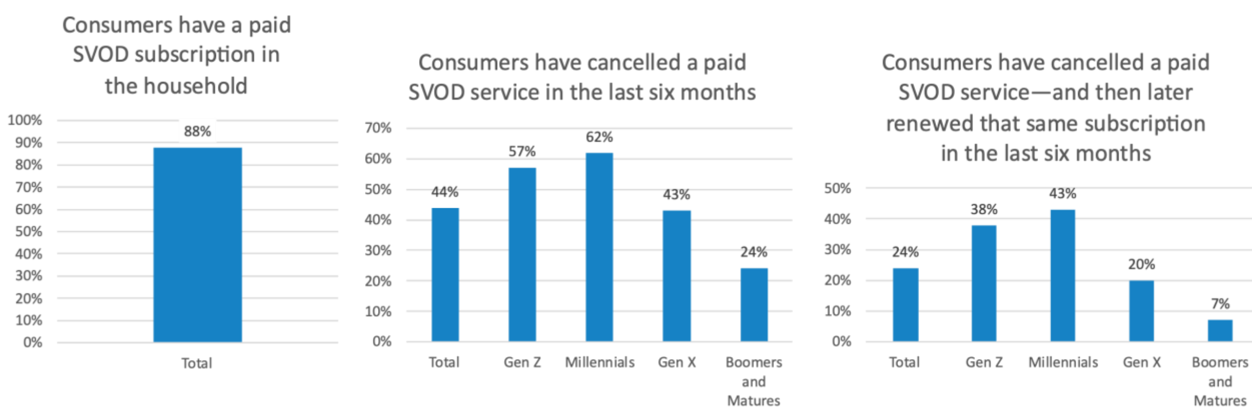


Source: Nielsen Company (U.S.), November 2023

Looking at longer-term trends, the audience continues to reduce their exclusive reliance on traditional/corded television, with only 6.7% of the overall 18- to 34-year-old male target using these channels and 52% relying exclusively on streaming for television content. While the Hispanic segment slightly lags behind this overall trend, only 13.4% of households in the Hispanic target audience exclusively access television content via regular/corded means (2023 Summer MRI-Simmons USA study). As the audience moves increasingly toward streaming and CTV services, NHTSA's CIOT 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 TV services and even further into streaming.

With recent writer and actor strikes, planning must also consider the risk of individual networks and the amount of scripted versus unscripted content each streaming service provides.

Figure 12: Top TV Programming by Program Type

	18- to 34-Year-Old Millennial Men		18- to 34-Year-Old Gen Z Men	
Program Type	*Reach (%)*	*Index*	*Reach (%)*	*Index*
Adventure/Western/Sci-Fi/Primetime	23.69%	44	25.65%	47
Football Specials—Professional	15.50%	103	14.44%	96
Football—Professional—Weekend	14.88%	97	13.27%	86
Football—Professional—Pregame Shows	9.61%	102	9.42%	100
Baseball—Weekend	9.12%	98	9.13%	98
Basketball—Weekend—College	9.77%	110	8.20%	92
Football—College—Weekend	9.40%	100	8.47%	90
Baseball Specials	9.14%	102	8.67%	97
Basketball—Weekend—Professional	8.93%	152	8.05%	137
Basketball Specials—Professional	8.02%	141	6.99%	123
Hockey	5.50%	134	4.63%	113
Football Bowl Games—Specials	4.65%	87	4.60%	86
Early Morning Weekday News Programs (Local)—Mon-Fri	3.70%	61	4.02%	66
Sports Anthologies—Weekend	3.70%	128	4.02%	139
Early Evening Weekday News Programs (Local)—Mon-Fri	3.11%	51	3.90%	63
Basketball Specials—College	3.58%	101	3.19%	90
Tennis	3.41%	80	3.34%	78
Early Morning News	3.41%	79	3.21%	75
Entertainment Specials	2.62%	65	2.73%	67
Horse Racing	2.60%	47	2.71%	49
Soccer	2.78%	154	2.48%	138
Late Night Talk/Variety	2.73%	105	2.43%	93

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

Taken 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 Summer 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 CIOT 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.

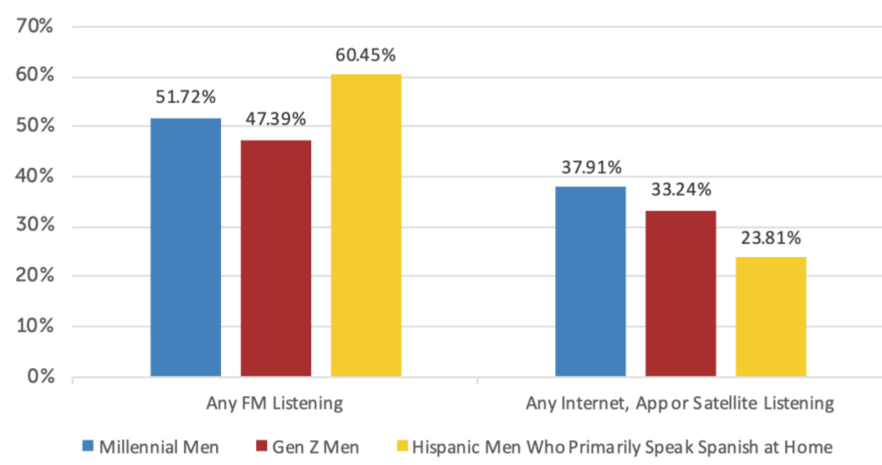
4.2 Audio Delivery

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 80% of the overall 18- to 34-year-old male audience, including streaming/apps/satellite delivery (2023 Summer 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 CIOT message among this audience.

Figure 13: Audio Consumption by 18- to 34-Year-Old Men (Reach %, Trailing Seven Days)



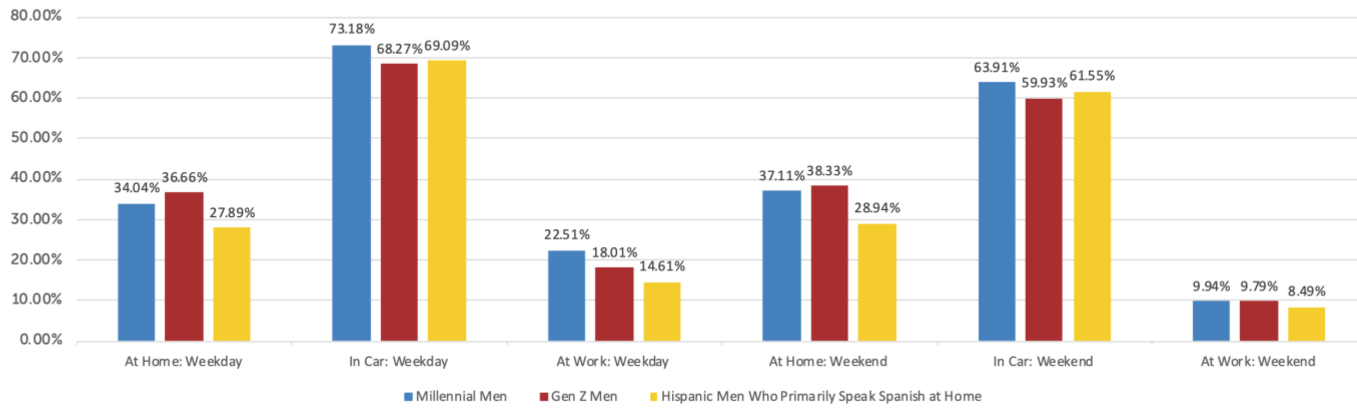
Source: 2023 Summer MRI-Simmons USA, Weight type: Population (000), Base: Study Universe

The audience use of multiple platforms makes terrestrial radio necessary to reach all of the 2024 CIOT 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 CIOT 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 34-Year-Old Men, by Location (%)



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

Research shows which terrestrial radio formats draw in each 2024 CIOT generation. Of Millennial males, 15% listen to contemporary hit radio (CHR), with country music coming in second at 8.6%. CHR programming also performs well for Gen Z men and the Hispanic target audience (Figure 15).

Figure 15: Top Radio Formats by Segment, 18- to 34-Year-Old Males

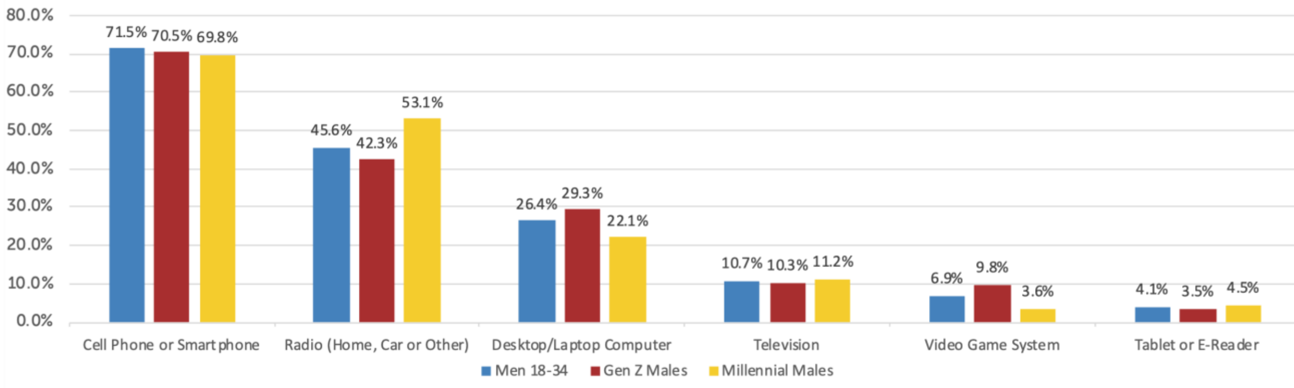
	18- to 34-Year-Old Millennial Men		18- to 34-Year-Old Gen Z Men		*18- to 34-Year-Old Hispanic Men Who Primarily Speak Spanish at Home**	
Format	*Reach (%)*	*Index*	*Reach (%)*	*Index*	*Reach (%)*	*Index*
CHR	15.0%	135	13.4%	121	19.4%	174
Adult Contemporary	8.2%	79	8.1%	78	~ ~	~ ~
Urban	7.4%	98	8.9%	119	~ ~	~ ~
Country	8.6%	78	6.4%	58	~ ~	~ ~
Urban Contemporary	5.9%	118	6.8%	136	~ ~	~ ~
Alternative	5.5%	133	2.8%	68	~ ~	~ ~
Classic Rock	4.6%	85	3.8%	70	~ ~	~ ~
Hispanic	4.9%	108	3.2%	72	21.6%	480

Source: 2023 Summer MRI-Simmons USA, Weight type: Population (000), Base: Study Universe
**Unstable projection values due to respondent count below 50 excluded*

Around 70% of 18- to 34-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 45% and personal computers at 26% (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: How the CIOT Target Audience Listens to Audio



Source: 2023 Doublebase GfK MRI Weighted to Population

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 regional Mexican, Spanish adult contemporary (AC) and tropical, 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 CIOT campaign, 18- to 34-year-old males were over-indexed across automotive segments and were found in health and wellness, fitness, socialites/partiers and traveler segments. The audiences tuned in most on Fridays, while the most engaging day of the week was Saturdays. These category and timing insights will be applied to streaming plans for 2024, seeking to increase the effectiveness and engagement with the CIOT message.

Spotify leads market reach for each segment, followed by Apple Music, Pandora and Amazon Music. 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 386.

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

	18- to 34-Year-Old Millennial Men		18- to 34-Year-Old Gen Z Men		18- to 34-Year-Old Hispanic Men Who Primarily Speak Spanish at Home*	
Music or Audio Service	*Reach (%)*	*Index*	*Reach (%)*	*Index*	*Reach (%)*	*Index*
Spotify	48.85%	155	58.12%	184	54.82%	174
Apple Music	19.21%	120	27.00%	169	19.93%	125
Pandora	19.3%	91	12.84%	60	15.37%	72
Amazon Music	14.01%	81	9.21%	53	11.50%	67
SoundCloud	5.94%	176	13.00%	386	~ ~	~ ~
iTunes	7.62%	95	7.05%	88	~ ~	~ ~
iHeartRadio	5.80%	70	5.65%	68	~ ~	~ ~

Source: 2023 Summer MRI-Simmons USA, Weight type: Population (000), Base: Study Universe
**Unstable projection values due to respondent count below 50 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 seat belt use. CIOT messaging will be strategically placed where the target demographic spends most of their time.

OOH media still resonates with 18- to 34-year-old males; billboards reach 65.4% of the target audience, while digital ads reach 54.5% (Figure 18). The 2024 CIOT campaign once again runs during the unofficial start of summer, when the target is more likely to be out and about, making OOH an effective tactic to reach them on the move.

Figure 18: OOH Video Ads Seen in the Last 30 Days by 18- to 34-Year-Old Males

	18- to 34-Year-Old Men		18- to 34-Year-Old Hispanic Men Who Primarily Speak Spanish at Home	
Out of Home Media	*Reach (%)*	*Index*	*Reach (%)*	*Index*
Billboards/Transit	66%	101	52%	79
Digital Display Ads	56%	114	63%	130
Ads at Sports, Entertainment, Events, Movies	53%	120	54%	121

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

The 2024 CIOT 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. NHTSA will explore opportunities that hit the key geotarget areas/states with higher fatalities where Hispanic males index higher for living. The flexibility to activate DOOH during short flights drives efficiency for the CIOT campaign, and the buy will target CIOT message display during peak drive times. Locations with considerable reach and visibility will be prioritized for more efficient CPMs.

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 CIOT 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 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.

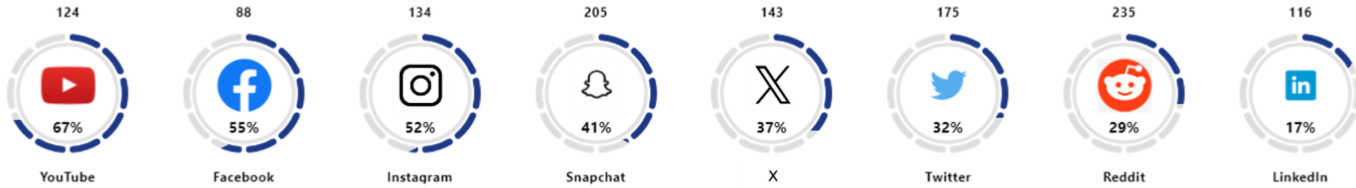
The Hispanic CIOT plan will also include a programmatic component extended to websites the target audience visits beyond what is included in the publisher direct buy. The messaging will reach the audience programmatically with targeted ads via video and display ads on multiple screens. Programmatic audio 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 34-year-old males. Looking at the top eight social media platforms of the 18- to 34-year-old demographic, over 50% of the audience uses Instagram, Facebook and YouTube (Figure 19). 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 19: Top Social Media Services (Reach and Index) 18- to 34-Year-Old Males

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



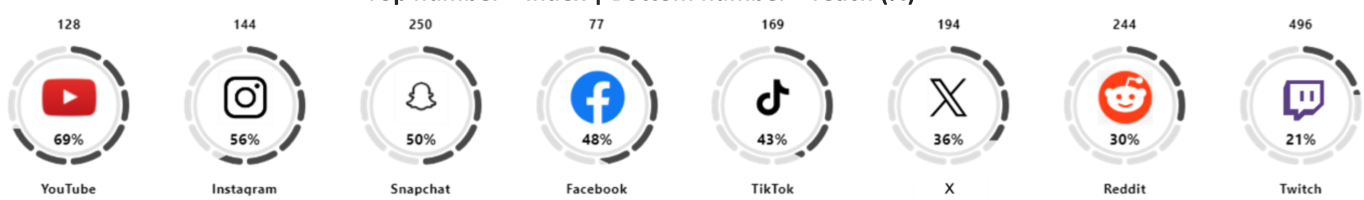
Source: 2023 Summer MRI-Simmons USA, Weight type: Population (000), Base: Study Universe

The 18- to 34-year-old male audience engages with social media by creating and watching videos, sharing memes/gifs, meeting friends, influencing others and playing games. Integrating NHTSA's message while users engage on social media platforms will allow the message to capture attention in a landscape where the target audience is already engaging. Visual content, such as images and videos, often captures their attention more effectively than text-based content, making video the primary creative asset for most social campaigns.

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 CIOT 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. The Gen Z Twitch audience indexes at 496 while reaching 21% of the audience, indicating a very high concentration of the target audience on the platform (Figure 20). The direct Twitch buy in 2023 delivered a 71% video completion rate, which equated to 5.9 million video completions at a low CPM.

Figure 20: Top Social Media Services (Reach and Index) Gen Z Males

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



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

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 is 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 CIOT 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	112	33.00%
Light - Medium	90	11.00%
Medium	72	10.00%
Medium - Heavy	72	8.00%
Heavy	76	6.00%
Newspaper		
Light	98	5.00%
Light - Medium	64	3.00%
Medium	78	4.00%
Medium - Heavy	31	2.00%
Heavy	63	1.00%
Radio		
Light	81	20.00%
Light - Medium	81	14.00%
Medium	91	12.00%
Medium - Heavy	116	14.00%
Heavy	111	12.00%
Television		
Light	132	25.00%
Light - Medium	104	19.00%
Medium	90	16.00%
Medium - Heavy	65	12.00%
Heavy	58	10.00%
Internet		
Light	54	12.00%
Light - Medium	74	15.00%
Medium	103	18.00%
Medium - Heavy	116	25.00%
Heavy	185	23.00%
Social Media		
Light	71	12.00%
Light - Medium	90	15.00%
Medium	102	17.00%
Medium - Heavy	128	25.00%
Heavy	157	20.00%

*Projections relatively unstable, use with caution

Figure 8 Data

Media Usage N-Tiles		Index	Percentage
Magazine			
	Light	110	32.00%
	Light - Medium	110	13.00%
	Medium	77	11.00%
	Medium - Heavy	71	8.00%
	Heavy	78	7.00%
Newspaper			
	Light	96	5.00%
	Light - Medium	71	3.00%
	Medium	65	3.00%
	Medium - Heavy	32	2.00%
	Heavy	74	2.00%
Radio			
	Light	77	19.00%
	Light - Medium	74	13.00%
	Medium	82	10.00%
	Medium - Heavy	122	15.00%
	Heavy	105	12.00%
Television			
	Light	132	25.00%
	Light - Medium	100	19.00%
	Medium	77	14.00%
	Medium - Heavy	58	10.00%
	Heavy	60	10.00%
Internet			
	Light	45	10.00%
	Light - Medium	69	14.00%
	Medium	104	18.00%
	Medium - Heavy	114	25.00%
	Heavy	207	26.00%
Social Media			
	Light	64	11.00%
	Light - Medium	90	15.00%
	Medium	87	15.00%
	Medium - Heavy	131	25.00%
	Heavy	187	23.00%

*Projections relatively unstable, use with caution

Figure 9 Data

Media Usage N-Tiles		Index	Percentage
Magazine			
	Light	114	34.00%
	Light - Medium	72	9.00%
	Medium	67	9.00%
	Medium - Heavy	72	8.00%
	Heavy	75	6.00%
Newspaper			
	Light	101	5.00%
	Light - Medium	58	3.00%
	Medium	90	4.00%
	Medium - Heavy	31	2.00%
	Heavy	*53	*1.00%
Radio			
	Light	85	21.00%
	Light - Medium	86	15.00%
	Medium	100	13.00%
	Medium - Heavy	112	13.00%
	Heavy	117	13.00%
Television			
	Light	133	25.00%
	Light - Medium	108	20.00%
	Medium	101	18.00%
	Medium - Heavy	70	12.00%
	Heavy	57	10.00%
Internet			
	Light	61	14.00%
	Light - Medium	78	15.00%
	Medium	101	18.00%
	Medium - Heavy	119	26.00%
	Heavy	165	21.00%
Social Media			
	Light	79	13.00%
	Light - Medium	91	16.00%
	Medium	116	20.00%
	Medium - Heavy	125	24.00%
	Heavy	130	16.00%

*Projections relatively unstable, use with caution