



2024 Impaired Driving Media Work Plan

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1.0 Executive Summary

The National Highway Traffic Safety Administration's (NHTSA) 2024 Impaired Driving high-visibility enforcement (HVE) campaign aims to remind drivers that the safest way home after drinking is to plan for a sober ride. This document provides an overview of the research and trends that inform NHTSA's national paid media plan for the 2024 Impaired Driving campaign, which happens over two flights.

Based on FARS data, the most significant demographic involved in drug-impaired driving crashes is 18- to 34-year-old males and, in alcohol-impaired driving crashes, is 21- to 34-year-old males, making them the primary target audience for this campaign. These demographics comprise two distinct generations—Gen Z, 18 to 27 years old, and Millennials, 28 to 34 years old, in 2024. An additional audience for the August/Labor Day Impaired Driving flight is 35- to 54-year-old male motorcyclists. This demographic consists of Millennials, 35 to 47 years old, and Gen X, 47 to 54 years old.

Throughout this report, data and trends for the 18- to 34-year-old target audience will be reviewed through a generational lens of Gen Z and Millennials. The motorcycle target audience will primarily be reviewed through an affinity targeting lens (motorcyclist culture) layered on top of the age and gender data.

National paid advertising will run over two flights, planned in tandem, over the August/Labor Day and the winter holiday season time frames. National paid advertising for the August/Labor Day flight will start Wednesday, August 14, 2024, and run through Monday, September 2, 2024. The Winter Holiday Season flight will start Wednesday, December 11, 2024, and run through Wednesday, January 1, 2025. The cumulative budget will be \$29.1 million and will be allocated accordingly across both flights.

The campaign will establish a mix of reach and engagement to drive message penetration during each of the two flights. 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.

Observing the current media environment and target audience usage, there has been 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 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 primarily by video completion rate (VCR) and click-through rate (CTR) on digital assets.

Using consistent creative assets and messaging across tactics helps build brand awareness, with custom content bolstering this brand awareness and building authentic engagement in a media channel's unique voice and style. 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 impact and engagement. For priority audiences, such as African American, Hispanic/Latino, Asian or American Indian Alaskan Native, the

campaign will speak to the universality of these interest areas with 18- to 34-year-old males since consumption and affinities don't drastically deviate. The key will be to focus on our custom content and understanding the importance of where programs or platforms or other more granular content is consumed heavily by underserved communities and building the messaging relationship with these audiences.

The plan relies heavily on digital tactics as nearly 100% of the target audience is connected to the internet. Streaming video continues to command more viewer time, with Nielsen reporting increases by about 10% from December 2022 to January 2023, with continuing increases through 2024 (Figure 15). MRI also shows that over 50% of the primary target audience is more likely to be found on a streaming service than on linear (traditional) TV.¹

In 2023, 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 across 2024 Impaired Driving 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 Impaired Driving 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 primary target audience as well as Gen Z and Millennials separately, given their differing affinities and interests.

The digital display portion of the buy 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.

¹ 2024 Winter MRI Simmons USA

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 Impaired Driving campaign aims to keep our roadways safe from impaired drivers by reminding them that impaired driving is illegal and law enforcement is actively enforcing DUI laws to deter them from getting on the road during this period.

The primary media strategy is to balance broad reach and frequency with engagement metrics to gain audience insights and connections through their passion points during both flights to ensure the message resonates.

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—Drive Sober or Get Pulled Over

Language	Asset Title	Types/Lengths	Additional Assets
English	Change Your World	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)	
English	Press Conference	Digital-Only Video (:30s, :15s and :06s)	Web banners (available in standard sizes)
Spanish	No Seas Tonto	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)	

Figure 2: Campaign Assets—If You Feel Different, You Drive Different. Drive High, Get a DUI

Language	Asset Title	Types/Lengths	Additional Assets
English	I Can Tell	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	I'm OK to Drive	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)	

Figure 3: Campaign Assets—Ride Sober or Get Pulled Over

Language	Asset Title	Types/Lengths	Additional Assets
English	Don't Roll the Throttle*	Video (:30s, :15s and :06s)	Web banners (available in standard sizes)

**This is a new asset that will be released during the 2024 August/Labor Day flight for the general market audience.*



2.1.2 Advertising Period

National paid advertising for the August/Labor Day flight will start Wednesday, August 14, 2024, and run through Monday, September 2, 2024. National paid advertising for the Winter Holiday Season flight will start Wednesday, December 11, 2024, and run through Wednesday, January 1, 2025.



2.1.3 Working Media Budget

The total budget for the 2024 Impaired Driving campaign is \$29.1 million. Budget allocated for each flight will depend on media partner opportunities and specific opportunities available.



2.1.4 Target Audience

The primary target audience is split into three demographics for the August/Labor Day flight: 18- to 34-year-old males who consume marijuana, 21- to 34-year-old males who consume alcohol and 35- to 54-year-old male motorcyclists who consume alcohol. The secondary target audience is 18- to 34-year-old Hispanic males who primarily speak and consume Spanish media at home who consume marijuana and 21- to 34-year-old Hispanic males who primarily speak and consume Spanish media at home who consume alcohol.

The primary target audience is split into two demographics for the Winter Holiday flight: 18- to 34-year-old males who consume marijuana and 21- to 34-year-old males who consume alcohol. The secondary target audience is 18- to 34-year-old Hispanic males who primarily speak and consume Spanish media at home who consume marijuana and 21- to 34-year-old Hispanic males who primarily speak and consume Spanish media at home who consume alcohol.

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

3.0 Campaign Audience Trends

Impaired drivers are a significant danger to our nation’s roadways, with over 10,000 impaired driving fatalities occurring every year since 2015.² The periods leading up to Labor Day weekend and the winter holidays include many celebrations and occasions for drinking and partying. Unfortunately, these celebrations result in an increased prevalence of impaired-driving deaths. This campaign targets the demographic groups most frequently involved in fatal crashes due to impairment. The primary audience is 18- to 34-year-old males. During the August/Labor Day flight, a 35- to 54-year-old male motorcyclist audience is layered in as they represent a significant portion of traffic during this period.

Tracking overall trends in media consumption among the target audiences 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 connected with the full breadth of the target age group for both audiences.

3.1 Audience Affinities and Passion Points

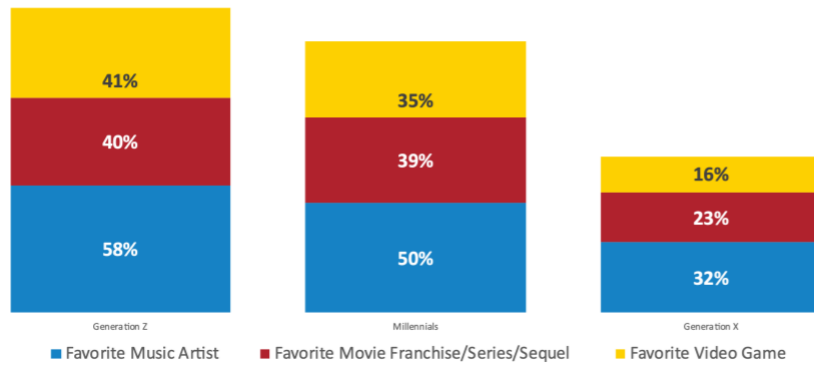
While fatality data defines the age segment focuses, high-reach touchpoints connect our message with the audience. These affinity areas give context to the placements and integrations that will most likely reach the target with NHTSA’s message.

Across this campaign’s audiences, three areas emerge as key core passion points for campaign engagement: online experiences and gaming, sports and music and film. A fourth area, specific to the motorcycle target audience, leans into what brings them together as an affinity audience through community and causes. Each area reaches the overall age segment differently, providing strong platforms to connect safety messaging with the audience. Passion points and fandoms are more important than ever to younger demographics. Deloitte’s 2024 Digital Media trends surveyed those who consider themselves fans (of a music artist, movie franchise or series, TV show, video game or sports team) and shows they are more engaged with their preferred media format than more casual consumers (Figure 4). These self-identified fans are younger, often more diverse and consider their fandom to be part of their identity, driving online engagement. By leveraging key passion points, the 2024 Impaired Driving campaign can tune into these fans to boost engagement and ultimately more effectively change behaviors.

² [FARS Data](#)

Figure 4: Fandoms by Generation

Consider Fandom Important to Identity

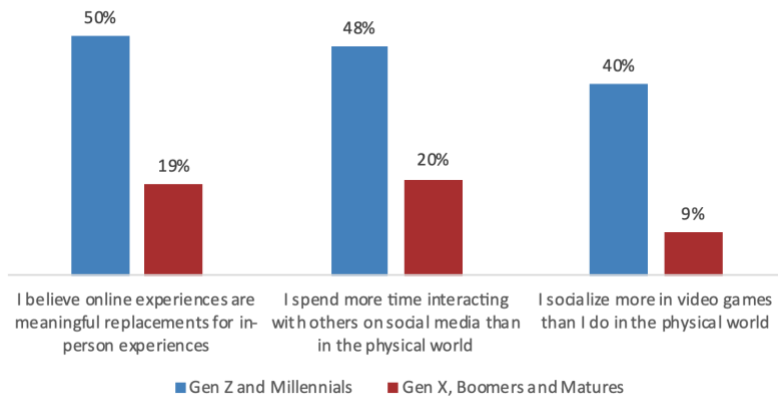


Source: Deloitte Insights, March 2024

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 5). 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.

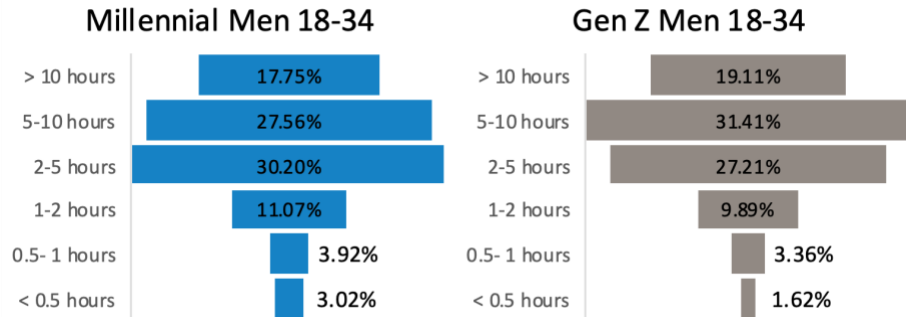
Figure 5: For Gen Z and Millennials, Online Experiences Are a Meaningful Part of Their Lives



Source: Deloitte Insights, April 2023

This trend underscores the importance of using online channels to reach the primary target audience effectively. Both generations within the primary 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 6). 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 6: Time Spent on the Internet “Yesterday” Among Millennial and Gen Z Men in the Age Demographic



Source: 2024 Winter MRI-Simmons USA

While online experiences, in general, are important, video games hold immense influence. Most men (52%) in the primary target audience find video games more entertaining than television. Among the Hispanic audience, the relevance of video gaming is also very strong, with one-third identifying as “gamers.”³

The 2024 Impaired Driving campaign will explore the activation of gaming influencers for the primary audience, 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. Passion 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 2024 Winter MRI-Simmons USA

Figure 7: Sports Fandom Among Millennial, Gen Z and Hispanic Men Ages 18 to 34 Years Old

Sport	Millennial Men 18- to 34-Years-Old		Gen Z Men 18- to 34-Years-Old		Hispanic Men 18- to 34-Years-Old		Motorcyclist Men 35- to 54-Years-Old	
	Super Fan (%)	Average Fan (%)	Super Fan (%)	Average Fan (%)	Super Fan (%)	Average Fan (%)	Super Fan (%)	Average Fan (%)
College Basketball	7.87%	15.02%	7.10%	14.06%	3.57%	13.86%	*10.33%	*14.52%
College Football	13.95%	16.33%	13.24%	15.64%	5.48%	12.49%	*16.47%	*25.75%
College Sports	3.07%	11.29%	3.32%	11.16%	1.95%	8.63%	*0.00%	*18.56%
Golf	3.00%	7.26%	3.62%	8.09%	2.19%	*5.08%	*1.20%	*7.78%
High School Sports	3.40%	9.24%	3.86%	9.91%	4.32%	7.81%	*0.75%	*20.36%
Major League Baseball	11.17%	13.14%	10.83%	14.14%	13.35%	14.58%	*6.74%	*23.80%
NASCAR	4.29%	6.81%	4.30%	7.46%	6.06%	8.57%	*5.24%	*13.02%
NBA	14.64%	14.02%	13.97%	13.82%	13.15%	15.40%	*7.04%	*8.53%
NFL	24.94%	17.75%	22.45%	17.40%	13.01%	16.41%	*25.90%	*16.92%
NHL	8.22%	10.61%	6.59%	11.22%	4.16%	11.31%	*11.23%	*7.78%
Olympics	11.08%	22.66%	11.30%	23.15%	12.07%	24.56%	*2.10%	*20.81%
Professional Wrestling	5.15%	6.82%	3.78%	6.93%	5.52%	8.35%	*5.24%	*3.14%
International Soccer	11.22%	9.99%	11.23%	9.97%	25.82%	16.35%	*1.35%	*6.14%
Major League Soccer	6.30%	9.37%	6.13%	10.12%	15.22%	12.23%	*4.64%	*4.34%
Tennis	4.15%	7.84%	4.03%	7.06%	6.27%	6.63%	*3.14%	*3.74%

Source: 2024 Winter MRI-Simmons USA

Some clear leaders emerge between audience segments regarding their “super fandom” (Figure 7). Many of the sports inspiring the greatest intensity for the general market segments—NFL, college football and NBA—are within season during the August/Labor Day and Winter Holiday Season campaigns, with the MLB and international soccer providing additional opportunities to connect with the target audience using sports placements, integrations and influencers.

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.

Across each flight, it will be essential to lean into different opportunities. Within the August/Labor Day flight, NFL Pre-Season, MLB and college football are essential in reaching the audience. For the Winter Holiday Season flight, NBA, NHL and NFL will provide wide reach and ignite engagement. For the Hispanic audience, professional soccer will run across both flights for maximum impact.

In addition to broad reach, it is essential to lean into high-indexing super fandoms for maximum impact. Although professional wrestling has less reach percentage with those identifying as fans, the super fans index over 200 for all audience segments except Gen Z. Sports like professional wrestling with such high-indexing super fans indicate strong audience engagement and passion within this group.

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 60% of the primary general market, 55% of the Hispanic target audience and 50% of the motorcyclist audience saw a film in a movie theater in the past six months (Figure 8). 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, including motorcyclists, 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 8: Audience Leisure Activity Participation

	18- to 34-Year-Olds (All)		18- to 34-Year-Olds (Hispanic)		35- to 54-Year-Olds (Motorcyclists)	
	Super Fan (%)	Average Fan (%)	Super Fan (%)	Average Fan (%)	Super Fan (%)	Average Fan (%)
Movies/Film						
Viewed movie at the theater in the past six months	60.36%	111	55.36%	101	51.50%	94
Music/Concerts						
Attended a music festival in past 12 months	7.91%	124	12.43%	196	10.30%	158
Attended other music performance in the past 12 months	10.71%	89	9.70%	80	8.68%	72
Television/Episodic Series						
I use social media to talk about shows I like	24.63%	148	31.20%	187	7.04%	42
Agree that binge-watching is a great way to watch a series	64.86%	101	54.40%	85	65.57%	102
Agree that "I often talk about TV shows with my friends"	50.92%	114	55.52%	124	36.98%	83
Agree that "I like watching shows that everyone is talking about"	44.77%	112	45.54%	114	36.68%	92

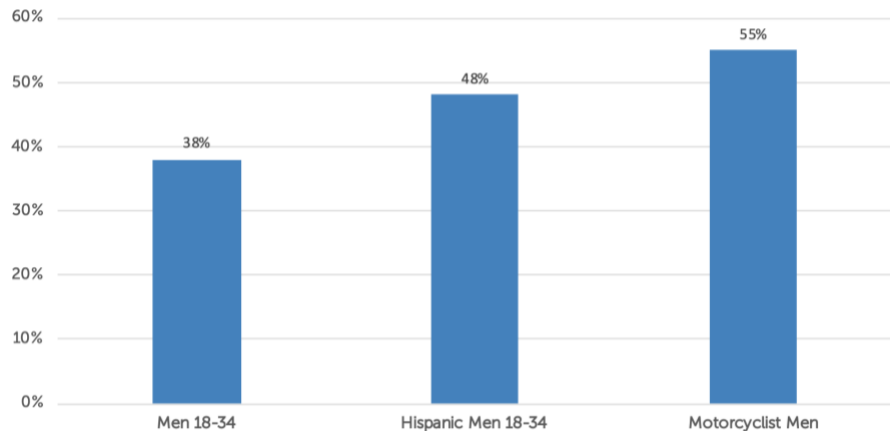
Source: 2024 Winter MRI-Simmons USA

3.1.4 Motorcyclist Culture

The 35- to 54-year-old male motorcyclist audience overlays with the passion points of gaming, sports and pop culture. However, within these core passion points, this audience has strong affinities toward other passions that bind them as a tight-knit community. Specific influencers within the motorcycle community can provide authenticity and reach to build relationships and relatable messaging for greater impact. When reviewing MRI-Simmons data holistically, a high-indexing trendline with this audience is their sense of charity and dedication to organizations and clubs. Over 80% of the motorcyclist audience considers duty to their community a primary value, indexing at over 500 for being members of human rights and charitable organizations (Figure 9).

Over 55% of the motorcyclist audience considers themselves automotive enthusiasts broadly, though this statement can branch into many different interpretations. They are also five to nine times more likely than the 18- to 34-year-old male audience to attend a motorcycle racing event in person or watch a motorcyclist event on television. Media partners' unique offerings to align events, community influencers and locations where this audience gathers and engages with content will be essential in reaching this group.

Figure 9: Automotive Enthusiasts



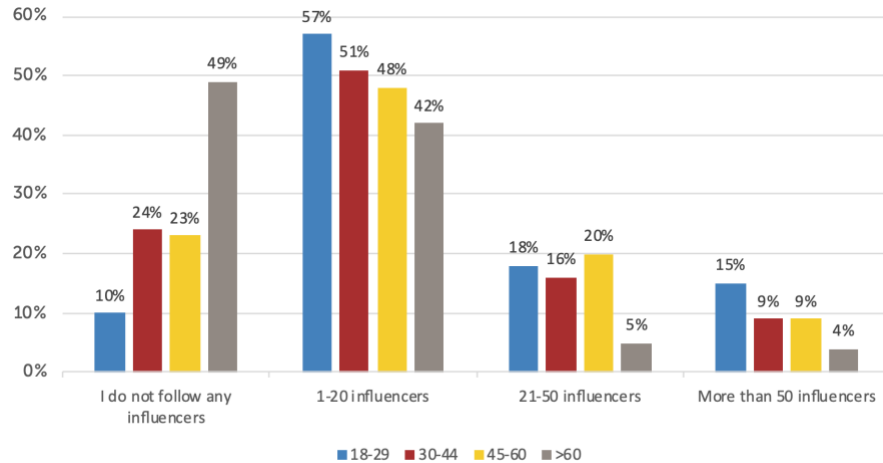
Source: 2024 Winter MRI-Simmons USA

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.

Authenticity is especially vital 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. Over 50% 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 10: Younger Generations Follow Multiple Influencers for Entertainment and Information



Source: IZEA 2023 Influencer Marketing Study Report

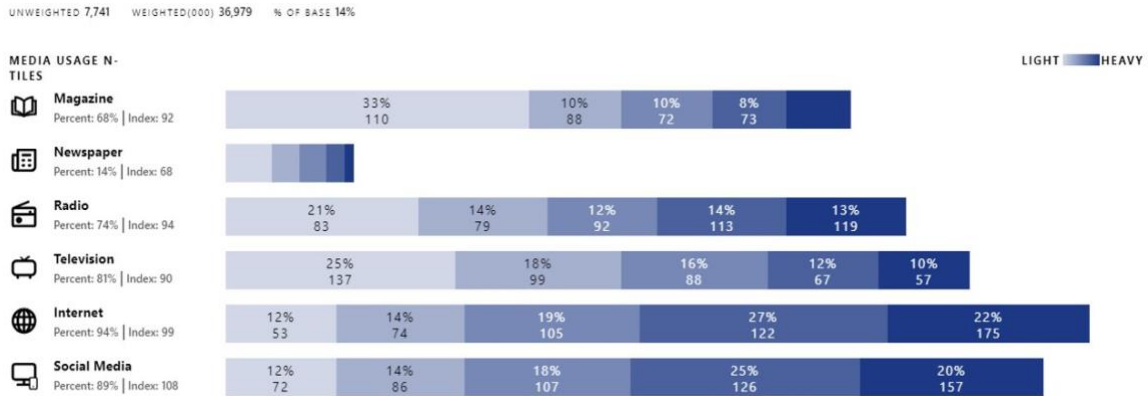
While influencers have slightly less hold on the older motorcycle target audience as they are not digital natives, influencers and content creators still resonate with this tight-knit community. Content creators who are directly ingrained within this community can create impact on social messaging through trusted, on-air talent and other custom content connections.

4.0 Media Channel Trends

In 2023, the Impaired Driving campaign allocated 50% of the primary budget to activities targeting the male 18- to 34-year-old audience broadly. 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. Approximately 10% of the budget went to the 35- to 54-year-old motorcyclist target directly.

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 22% in the highest quintile for internet usage and 20% in the top quintile for heavy social media use (Figure 11).

Figure 11: 18- to 34-Year-Old Media Usage Quintiles



*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 close to 200 compared to adults overall (Figure 12).

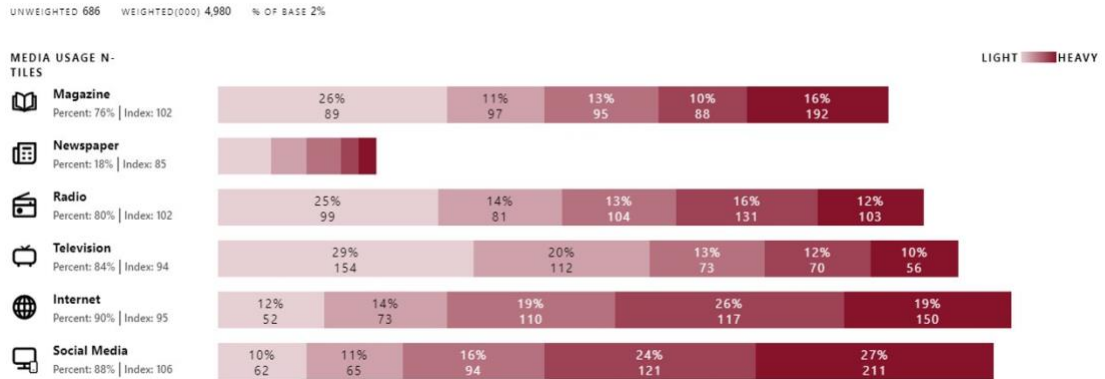
Figure 12: Gen Z 18- to 34-Year-Old Media Usage Quintiles



*Note: Complete quintile percent and index data for Newspaper available in section [7.0 Appendix](#)

Specifically, within the Hispanic portion of the audience, there are very similar patterns in top usage channels (Figure 13). 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 27% and has continued to increase. Additionally, there is slightly heavier use of nearly every traditional channel measured by the survey compared to the general market audience and equal for the internet and social media, which implies the Hispanic audience consumes media a little more throughout the day than the general market.

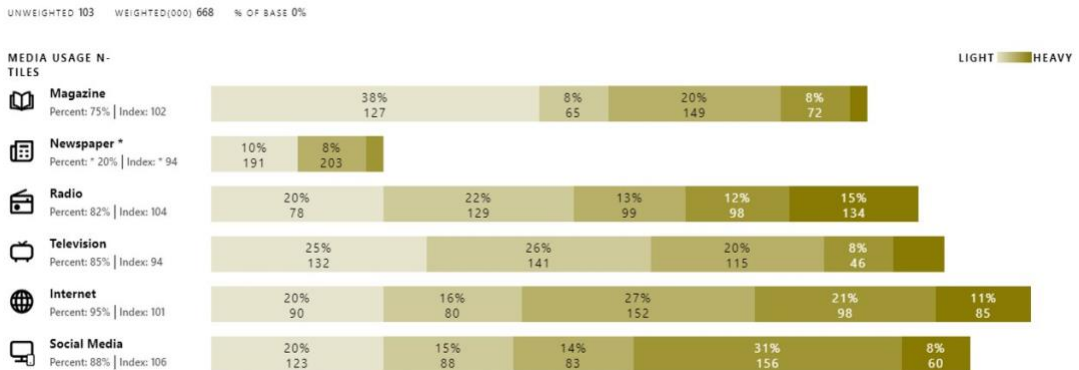
Figure 13: 18- to 34-Year-Old Hispanic Media Usage Quintiles



**Note: Complete quintile percent and index data for Newspaper available in section 7.0 Appendix.*

When looking individually at the 35- to 54-year-old male motorcycle audience (Figure 14), the general reach of each channel is similar to the 18- to 34-year-old male audience. When considering all major channels, the motorcyclist audience has lighter usage across the board, indicating they consume less media during the day than the 18- to 34-year-old male audience holistically.

Figure 14: 35- to 54-Year-Old Motorcycle Audience Media Usage Quintiles



**Note: Complete quintile percent and index data for Magazine and Newspaper available in section 7.0 Appendix.*

The 2024 Impaired Driving campaign will prioritize these high-usage channels to build the campaign’s reach. These will be paired with high-affinity interest areas interest and audience-targeting tactics to reach the intended demographic. NHTSA plans to run video and audio and display assets, as well as 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.

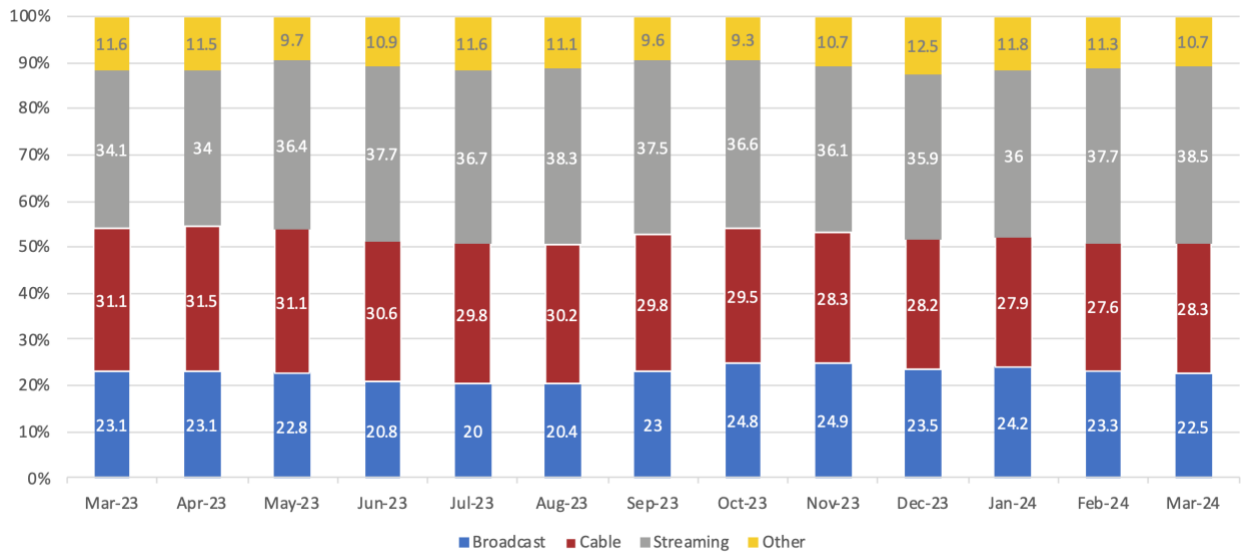
4.1.1 Linear (Traditional) TV, Connected TV and Streaming

Moving from 2023 into 2024, broadcast and cable viewing continue to drop while streaming time increased to almost 38% (Figure 15). Accordingly, NHTSA increased the Impaired Driving CTV placement budget to 11% 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 continue to look for opportunities to increase investment in CTV tactics.

As of the latest Nielsen report (Figure 15), broadcast TV usage has continued on an upward trajectory. Programming was a key driver of the increase—high levels of interest in live sports programming during December (NFL) show an increase of 3% in comparison to August. 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 15: Daily TV Media Time Spent by Viewing Type (%)



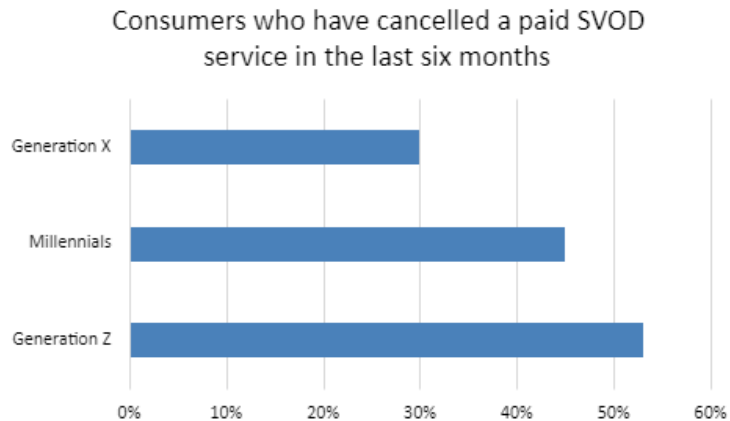
Source: Nielsen Company (U.S.), April 2024

Looking at longer-term trends, the audience continues to reduce their exclusive reliance on traditional/corded television, with only 6.6% of the overall 18- to 34-year-old male target using these channels and 52.6% relying exclusively on streaming for television content. While the Hispanic segment slightly lags behind this overall trend, only 12.9% of households in the Hispanic target audience exclusively access television content via regular/corded means. Although heavier television users, the trend stays the same for the 35- to 54-year-old motorcyclist audience, with only 10.6% corded.⁴

As the audience moves increasingly toward streaming and CTV services, NHTSA’s Impaired Driving 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 offer 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 16).

Figure 16: Paid Streaming Video-On-Demand Subscriptions Churn



Source: Deloitte Insights Digital Media Trends, March 2024

Many streaming video users of all different generations are reaching their breaking point. Approximately 60% of users of all generations would cancel their favorite streaming video on demand (SVOD) service if the monthly price went up \$5 per month. 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. Top television content for Millennials, Gen Z and the motorcycle audience centers around sports programming (Figure 17).

⁴ 2024 Winter MRI-Simmons USA

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 strike lifting in November 2023, scripted content will begin an uptick in releases around the summer of 2024. With an increase in new content after this lull, we can anticipate primetime television to return to previous shares of reach. Competition in the 2024 election cycle must also be considered when planning against both streaming and broadcast content.

Figure 17: Top TV Programming by Program Type

Program Type	18- to 34-Year-Old Gen Z Men		18- to 34-Year-Old Millennial Men		35- to 54-Year-Old Motorcyclist Men	
	Reach (%)	Index	Reach (%)	Index	Reach (%)	Index
	100.00%	100	100.00%	100	100.00%	100
Auto Racing—Specials	2.41%	100	1.52%	63	4.34%	181
Baseball Specials	7.41%	84	7.83%	89	6.59%	75
Baseball—Weekend	7.98%	93	8.08%	94	10.48%	122
Basketball Specials—College	2.89%	87	3.01%	90	3.14%	94
Basketball Specials—Professional	6.55%	119	7.06%	128	7.63%	138
Basketball—Weekend—College	7.51%	88	9.14%	107	8.68%	102
Basketball—Weekend—Professional	7.96%	141	8.24%	146	6.89%	122
Early Evening Weekday News Programs (Local)	3.22%	56	2.23%	39	1.50%	26
Early Morning News	2.70%	64	2.07%	49	3.44%	82
Early Morning Weekday News Programs (Local)	3.38%	58	2.78%	47	2.40%	41
Entertainment Specials	2.86%	70	2.42%	59	1.35%	33
Football Bowl Games-Specials	4.22%	80	4.30%	81	7.93%	150
Football Pro Pregame Shows	8.14%	94	8.78%	101	19.31%	223
Football Specials-Professional	13.23%	92	14.11%	98	18.71%	130
Football—College Weekend	8.13%	86	9.26%	98	11.38%	121
Football—Pro Weekend	11.83%	85	13.56%	98	21.11%	152
Hockey	4.11%	100	4.86%	119	6.14%	150
Late Night Talk/Variety	2.49%	99	2.31%	92	2.99%	119
Soccer	2.61%	135	2.47%	127	0.90%	46
Sports Anthologies-Weekend	3.77%	133	3.62%	128	4.94%	174
Tennis	3.16%	72	3.36%	76	5.09%	115

Source: 2024 Winter 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. As seen with lower media consumption generally, the motorcyclist audience does spend slightly less time on YouTube, averaging 40 minutes of attention daily.⁵

Online video opportunities extend well beyond YouTube. With so much online usage, many apps, websites and gaming devices can deliver the Impaired Driving 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.

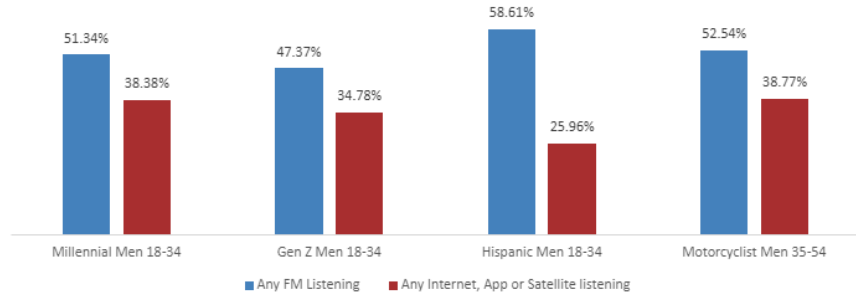
4.2 Audio Delivery

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 74% of the overall 18- to 34-year-old male audience and 82% of the 35- to 54-year-old motorcycle audience, including streaming/apps/satellite delivery (2024 Winter 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 primary audience and motorcyclist audience are more likely to consume audio content via streaming sources than Gen Z, though Gen Z consumes more audio content overall. Small reach disparities exist between generations for FM radio as well as satellite radio, with those gaps expanding when the motorcycle audience is taken into consideration as they are two times as likely to be reached through satellite radio in comparison. Examining the Hispanic audience, FM listening leads audio consumption by a more sizable margin for all audiences (Figure 18), making it a strong tactic to continue driving awareness for the Impaired Driving message among this audience.

⁵ 2024 Winter MRI-Simmons USA

Figure 18: Audio Consumption (Reach %, Trailing Seven Days)



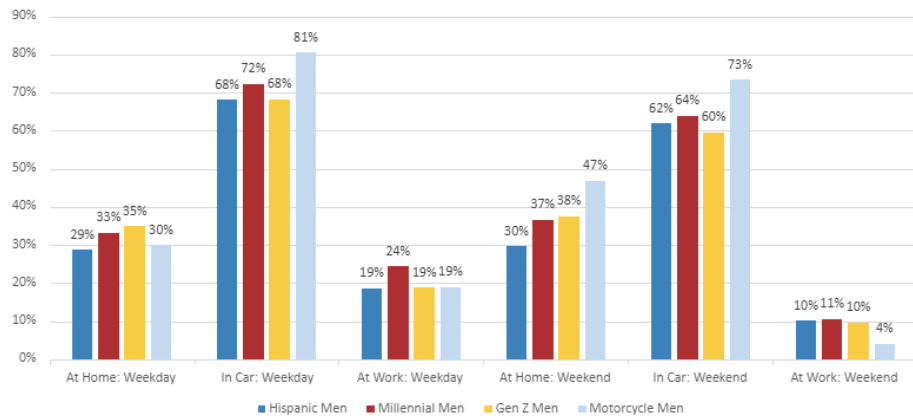
Source: 2024 Winter MRI-Simmons USA, Weight type: Population (000), Base: Study Universe

The audience’s use of multiple platforms makes terrestrial radio necessary to reach all the 2024 Impaired Driving 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 Impaired Driving message is immediately actionable, audio delivery via terrestrial radio and streaming options remains an important foundational channel for the campaign. This is particularly true for the motorcyclist audience, whose reach is on average 10% higher for in-vehicle listening.

Figure 19: Audio Reach by Location (%)



Source: 2024 Winter MRI-Simmons USA, Weight type: Population (000), Base: Study Universe

Research shows which terrestrial radio formats draw in each 2024 Impaired Driving generation. Of Millennial males, 13% listen to contemporary hit radio (CHR), with country music coming in second at 9%. CHR programming also performs well for Gen Z men and the Hispanic target audience, with the reach of contemporary and urban formats taking up similar space in the market (Figure 20). With over 20% reach, country leads within the motorcycle audience and should be a major consideration in reaching this audience.

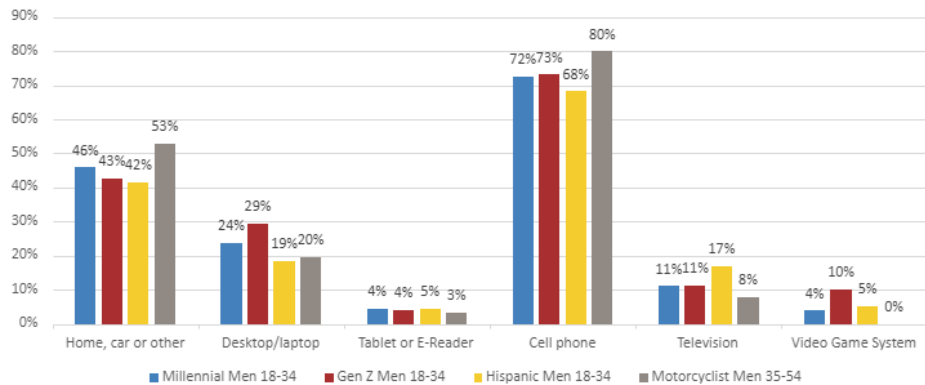
Figure 20: Top Radio Formats by Segments

Format	Millennial Men 18-34		Gen Z Men 18-34		Hispanic Men 18-34		Motorcyclist Men 35-54	
	Super Fan (%)	Average Fan (%)	Super Fan (%)	Average Fan (%)	Super Fan (%)	Average Fan (%)	Super Fan (%)	Average Fan (%)
CHR	13.24%	124	12.16%	113	12.27%	114	8.68%	81
Country	9.02%	81	7.20%	65	5.40%	49	20.06%	181
Adult Contemporary	7.53%	75	7.56%	75	7.35%	73	3.89%	39
Urban	7.06%	96	7.94%	108	3.35%	46	2.84%	39
Urban Contemporary	5.50%	111	6.19%	125	2.17%	44	2.84%	57
Hispanic	5.41%	117	4.30%	93	24.72%	535	1.80%	39
Classic Rock	5.24%	98	3.87%	72	3.21%	60	5.24%	98
Rock	4.64%	129	3.23%	89	2.33%	64	5.39%	149
Alternative	4.51%	115	2.36%	60	3.82%	98	6.44%	165
News	3.86%	48	2.00%	25	2.09%	26	8.38%	104
Hot AC	3.59%	89	3.55%	88	3.07%	76	1.20%	30
Sports	2.97%	100	1.89%	64	1.04%	35	3.44%	116
Classic Hits	2.48%	57	2.33%	54	1.75%	40	2.54%	59

Source: 2024 Winter MRI-Simmons USA, Weight type: Population (000), Base: Study Universe

Audio listeners use smartphones the most by a wide margin, with 72.78% of 18- to 34-year-old males listening to audio on cell phones and smartphones. However, the primary audience also listens on devices within the home, car and other (including smart devices) at 44.18% and personal computers at 26.52% (Figure 21). The motorcyclist audience has similar reach tendencies, though have more reach on devices that could be used while riding in alignment with in-vehicle listening reach. 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 21: How the Impaired Driving Target Audience Listens to Audio



Source: 2024 Winter MRI-Simmons USA

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 Impaired Driving campaign, 18- to 34-year-old males were over-indexed across sports, video gaming, travel and fitness segments. These category insights will be applied to streaming plans for 2024, seeking to increase the effectiveness and engagement with the Impaired Driving message.

Spotify leads market reach for each audience, followed by Apple Music, Pandora and Amazon Prime 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 22) and hitting an exceedingly high index of 386.

Figure 22: Music or Audio Service Used in Past 30 Days

Music or Audio Service	Millennial Men 18- to 34-Years- Old		Gen Z Men 18- to 34-Years- Old		Hispanic Men 18- to 34-Years- Old		Motorcyclist Men 35- to 54- Years-Old	
	Super Fan (%)	Average Fan (%)	Super Fan (%)	Average Fan (%)	Super Fan (%)	Average Fan (%)	Super Fan (%)	Average Fan (%)
Spotify	48.87%	151	56.44%	175	49.74%	154	30.39%	94
Apple Music	21.53%	129	26.71%	160	26.71%	160	25.15%	151
Pandora	17.67%	86	10.83%	53	13.21%	64	15.87%	77
Amazon Prime Music	13.53%	79	10.97%	64	11.63%	68	20.06%	117
iTunes	6.47%	87	5.47%	73	5.56%	74	7.63%	102
SoundCloud	5.85%	174	12.16%	362	7.37%	219	0.30%	9
iHeartRadio	5.29%	65	4.29%	53	4.02%	49	5.39%	66

Source: 2024 Winter MRI-Simmons USA, Weight type: Population (000), Base: Study Universe

The 2024 Impaired Driving 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.

4.3 Out-of-Home (OOH)

OOH media extends the campaign message beyond the audience’s screen and provides a last line of defense to encourage sober driving. Impaired Driving 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% of the target audience, while digital ads reach 57% (Figure 23). The 2024 Impaired Driving campaign once again runs during two key holiday periods, when the target is more likely to be out and about, making OOH an effective tactic to reach them on the move.

Figure 23: OOH Video Ads Seen in the Last 30 Days

Out-of-Home Media	18- to 34-Year-Old Gen Z Men		18- to 34-Year-Old Millennial Men		35- to 54-Year-Old Motorcyclist Men	
	Reach (%)	Index	Reach (%)	Index	Reach (%)	Index
	100.00%	100	100.00%	100	100.00%	100
Billboards/Transit	65%	101	54%	83	64%	99
Digital Display Ads	57%	115	63%	127	59%	118
Ads at Sports, Entertainment, Events, Movies	52%	117	49%	109	45%	101

Source: 2024 Winter MRI-Simmons USA, Weight type: Population (000), Base: Study Universe

Although the motorcycle audience has similar reach across OOH, unique opportunities exist for this audience to geographically target spaces where motorcycles frequent to boost effectiveness of OOH messaging.

The 2024 Impaired Driving 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 Impaired Driving campaign, and the buy will target Impaired Driving message display during peak drive times. The campaign will prioritize locations with considerable reach and visibility 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 Impaired Driving 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.

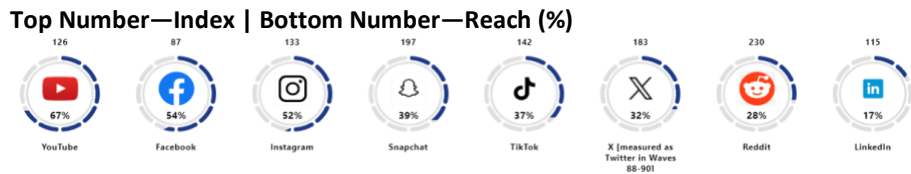
Targeting for the motorcycle audience will focus on contextual and behavioral factors, narrowing down on motorcyclists within their niche online communities to maximize spend and impact.

The Hispanic Impaired Driving 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 24). This is the first year YouTube has been in the top position; it has become a platform for user engagement, not just a place to watch videos.

Figure 24: Top Social Media Services (Reach and Index) 18- to 34-Year-Old Males



Source: 2024 Winter 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 Impaired Driving 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 490 while reaching 19% of the audience, indicating a very high concentration of the target audience on the platform (Figure 25).

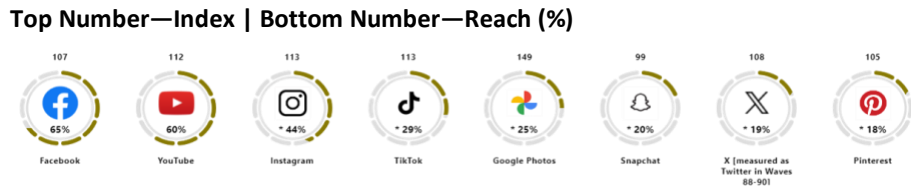
Figure 25: Top Social Media Services (Reach and Index) Gen Z Males



Source: 2024 Winter MRI-Simmons USA, Weight type: Population (000), Base: Study Universe

Social media consumption varies when looking at the motorcycle audience due to age disparity, though the primary platforms are the same (Figure 26). The common thread this demographic has with the primary target is the higher percentages of users on Facebook and YouTube. While Instagram is also in the top three, it does fall under the 50% user mark.

Figure 26: Top Social Media Services (Reach and Index) 35 to 54-Year-Old Male Motorcyclists



Source: 2024 Winter 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 are a good complement to enhance reach and engagement for the campaign.

Out-of-Home (OOH)

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 Impaired Driving 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 (Traditional) 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 11 Data

Media Usage N-Tiles	Index	Percentage
Magazine		
Light	110	33.00%
Light–Medium	88	10.00%
Medium	72	10.00%
Medium–Heavy	73	8.00%
Heavy	91	7.00%
Newspaper		
Light	100	5.00%
Light–Medium	79	3.00%
Medium	80	3.00%
Medium–Heavy	30	2.00%
Heavy	58	1.00%
Radio		
Light	83	21.00%
Light–Medium	79	14.00%
Medium	92	12.00%
Medium–Heavy	113	14.00%
Heavy	119	13.00%
Television		
Light	137	25.00%
Light–Medium	99	18.00%
Medium	88	16.00%
Medium–Heavy	67	12.00%
Heavy	57	10.00%
Internet		
Light	53	12.00%
Light–Medium	74	14.00%
Medium	105	19.00%
Medium–Heavy	122	27.00%
Heavy	175	22.00%
Social Media		
Light	72	12.00%
Light–Medium	86	14.00%
Medium	107	18.00%
Medium–Heavy	126	25.00%
Heavy	157	20.00%

*Projections relatively unstable, use with caution

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Figure 12 Data

Media Usage N-Tiles	Index	Percentage
Magazine		
Light	111	33.00%
Light–Medium	95	11.00%
Medium	78	10.00%
Medium–Heavy	68	8.00%
Heavy	95	8.00%
Newspaper		
Light	103	5.00%
Light–Medium	81	3.00%
Medium	83	3.00%
Medium–Heavy	25	2.00%
Heavy	66	1.00%
Radio		
Light	81	20.00%
Light–Medium	69	12.00%
Medium	87	11.00%
Medium–Heavy	112	14.00%
Heavy	122	14.00%
Television		
Light	143	27.00%
Light–Medium	91	16.00%
Medium	75	13.00%
Medium–Heavy	61	11.00%
Heavy	60	11.00%
Internet		
Light	47	10.00%
Light–Medium	67	13.00%
Medium	105	19.00%
Medium–Heavy	124	27.00%
Heavy	190	24.00%
Social Media		
Light	71	12.00%
Light–Medium	81	13.00%
Medium	94	16.00%
Medium–Heavy	131	26.00%
Heavy	179	23.00%

*Projections relatively unstable, use with caution

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Figure 13 Data

Media Usage N-Tiles	Index	Percentage
Magazine		
Light	89	26.00%
Light–Medium	97	11.00%
Medium	95	13.00%
Medium–Heavy	88	10.00%
Heavy	192	16.00%
Newspaper		
Light	*123	*6.00%
Light–Medium	*102	*4.00%
Medium	*95	*4.00%
Medium–Heavy	*31	*2.00%
Heavy	*100	*2.00%
Radio		
Light	99	25.00%
Light–Medium	81	14.00%
Medium	104	13.00%
Medium–Heavy	131	16.00%
Heavy	103	12.00%
Television		
Light	154	29.00%
Light–Medium	112	20.00%
Medium	73	13.00%
Medium–Heavy	70	12.00%
Heavy	56	10.00%
Internet		
Light	52	12.00%
Light–Medium	73	14.00%
Medium	110	19.00%
Medium–Heavy	117	26.00%
Heavy	150	19.00%
Social Media		
Light	62	10.00%
Light–Medium	65	11.00%
Medium	94	16.00%
Medium–Heavy	121	24.00%
Heavy	211	27.00%

*Projections relatively unstable, use with caution

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Figure 14 Data

Media Usage N-Tiles	Index	Percentage
Magazine		
Light	*127	*38.00%
Light–Medium	*65	*8.00%
Medium	*149	*20.00%
Medium–Heavy	*72	*8.00%
Heavy	*22	*2.00%
Newspaper		
Light	*191	*10.00%
Light–Medium	*0	*0.00%
Medium	*203	*8.00%
Medium–Heavy	*38	*2.00%
Heavy	*0	*0.00%
Radio		
Light	*78	*20.00%
Light–Medium	*129	*22.00%
Medium	*99	*13.00%
Medium–Heavy	*98	*12.00%
Heavy	*134	*15.00%
Television		
Light	*132	*25.00%
Light–Medium	*141	*26.00%
Medium	*115	*20.00%
Medium–Heavy	*46	*8.00%
Heavy	*33	*6.00%
Internet		
Light	*90	*20.00%
Light–Medium	*80	*16.00%
Medium	*152	*27.00%
Medium–Heavy	*98	*21.00%
Heavy	*85	*11.00%
Social Media		
Light	*123	*20.00%
Light–Medium	*88	*15.00%
Medium	*83	*14.00%
Medium–Heavy	*156	*31.00%
Heavy	*60	*8.00%

*Projections relatively unstable, use with caution

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