



Media Work Plan

2022 Speed Prevention
Social Norming Campaign

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Executive Summary

Speeding endangers everyone on the road. Speed limits are put in place to enhance safety by reducing risks imposed by drivers' speed choices. Unfortunately, not everyone follows the speed limit and one of the biggest challenges in addressing the danger of speeding is that it's widely accepted behavior nationwide. According to the 2019 AAA Safety Culture Index, 48.3% of motorists reported exceeding the speed limit by 15 mph on highways, while 41.5% admitted driving 10 mph over the posted speed limit on residential streets. A 2014 NHTSA research study concluded that regular speeders use posted speed limits as their "benchmark" or "threshold." They are very aware of the risks associated with speeding, both a citation and a crash. Further, they willingly accept those risks because they perceive both risks as extremely low.

Habitual speeders often comment on how they make driving decisions depending on weather/road conditions and make an effort to avoid distractions. In general, they believe that they drive safely. They need to be awakened to the fact that speeding itself is unsafe and increases crash risk. Once they have that realization, the human impact of their actions becomes more tangible. They don't want to be responsible for inflicting the pain and suffering that comes from a crash on others.

Through a national social norming campaign, NHTSA seeks to help states and partners communicate about the dangers and consequences of speeding. The creative will communicate how speeding increases the risk of getting into a crash and the consequences to themselves and others as a result.

The 2021 Traffic Safety Facts show that 2020 saw an 11% increase in fatalities in speeding-related crashes. Traffic fatalities among young men (16- to 44-years-old) all increased by at least 10%. MRI-Simmons, a research tool that provides insights into consumer behavior, indicates that males in this age group are most likely to enjoy risk-taking behaviors as well as have a preference for vehicles that offer spirited performance and powerful acceleration. As a result, 18- to 44-year-old males are the primary target audience for this campaign. National paid advertising will run for 21 days, beginning Wednesday, July 20 through Sunday, August 14, 2022, and will be supported by an \$8 million paid media budget.

The campaign will use a mix of video, audio, digital, paid social media, and out-of-home (OOH) media to reach the target audience. Media selection will be based on usage among the target audience and strategies will be considered based on current consumer research.

This document provides an overview of the research and trends that inform NHTSA's national paid media plan for the 2022 Speed Prevention social norming campaign. 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 own media plans. Campaign materials will be made available at TrafficSafetyMarketing.gov.

Media selection will be based on the target audience's media usage patterns, as reported by MRI-Simmons. The campaign will aim to quickly establish broad reach and a high frequency to drive message penetration. Research shows that advertising effectiveness increases as additional media channels are added to the paid media plan. Media universes are neither measured equally nor does the entire target audience consume any single channel, such as digital, radio or TV. Therefore, it is important to determine a channel mix that will frequently engage the target audiences. NHTSA will use a multi-channel, multi-platform paid media strategy consisting of a mix of digital, video and audio tactics, as well as OOH advertising to reach more than 50% of the target audience on their preferred channels multiple times throughout the campaign.

The overall strategy will focus on the most efficient, high-reach tactics to meet reach and frequency goals. The demographic comprises two distinct generations—Gen Z (18- to 24-year-olds) and Millennials (25- to 44-year-olds). The plan will seek to reach each generational audience where they consume media the most, relying on content to connect the Speed message to each specific generation. As we observe the current media environment and usage by the target audience, we are seeing a shift in how time is spent consuming media. At the same time, consumers are using multiple methods to view content. As a result, a well-rounded strategy for reaching the target audience must include a combination of linear TV and terrestrial radio advertising as well as digital media, including streaming video and audio. Mediums selected for campaigns should consist of multiple touchpoints with consistent creative across each tactic to reach consumers and build brand awareness.

Because nearly 100% of the target audience is connected to the internet, the plan relies heavily on digital tactics. It will be led by mobile delivery methods, with a second-screen strategy to reach the target audience when they are using multiple screens simultaneously, which will aid in generating the maximum number of unduplicated impressions. The digital media plan will explore custom native content via direct publisher partners, programmatic video, display and paid social media channels.

Video viewership continues to cross over linear networks and streaming services, and both are key in providing brand awareness. While linear TV is still needed to reach audiences, particularly in live sports and local programming, connected TV (CTV) and over-the-top (OTT) is becoming the primary placement to reach the target audience and will be included as an integral part of a well-rounded media plan. Linear TV will be primarily bought programmatically to reach the target audience on their most-watched networks and programming.

Audio tactics, including terrestrial (AM/FM) radio and digital streaming, is another dominant reach vehicle and will be an important component of the campaign. Podcasts will also be considered to reach the audiences in their cars when they may be speeding.

Finally, out-of-home (OOH) options will be explored to extend the reach of the audio and video elements of the campaign in the places where the target audience lives, works and plays.

Media Strategy and Campaign Details

The 2022 Speed Prevention social norming campaign aims to communicate to 18- to 44-year-old male drivers that speeding is unsafe and increases crash risk. With a relatively short campaign window and a new message, the primary media strategy is to quickly build reach and frequency to connect the target audience with our message five to nine times throughout the course of the campaign. Digital tactics, paid social media and broadcast (audio and video) will all be activated to ensure that the reach and frequency goals are met.

Planned Campaign Assets

Figure 1: Campaign Assets

Language	Asset	Radio
English/Spanish	New Assets in Development	TV, Radio, Digital, Social

Advertising Period

Paid advertising will run starting Wednesday, July 20, through Sunday, August 14, 2022. The campaign is national in scope.

Figure 2: Campaign Calendar

M	T	W	Th	F	Sat	Sun
July				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
August						
1	2	3	4	5	6	7
8	9	10	11	12	13	14

Working Media Budget

The total budget for the 2022 Speed Prevention social norming campaign is \$8 million.

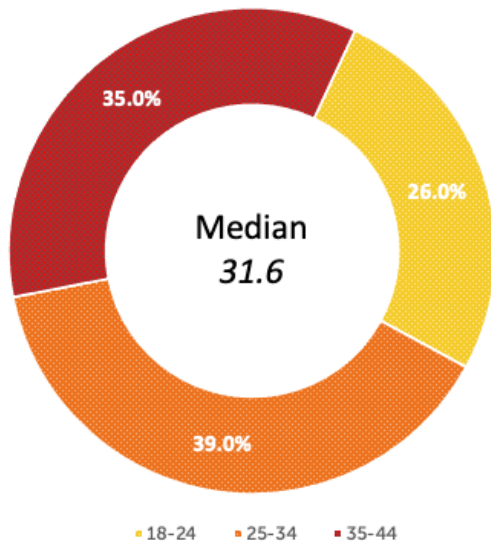
Target Audience

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

Generation Overview

The 18- to 44-year-old male target audience is comprised of two generations, each of whom has distinct characteristics and media usage behaviors. Gen Z (18- to 24-years-old) makes up 26% of the target and Millennials (24- to 44-years-old) make up 74% of the target.

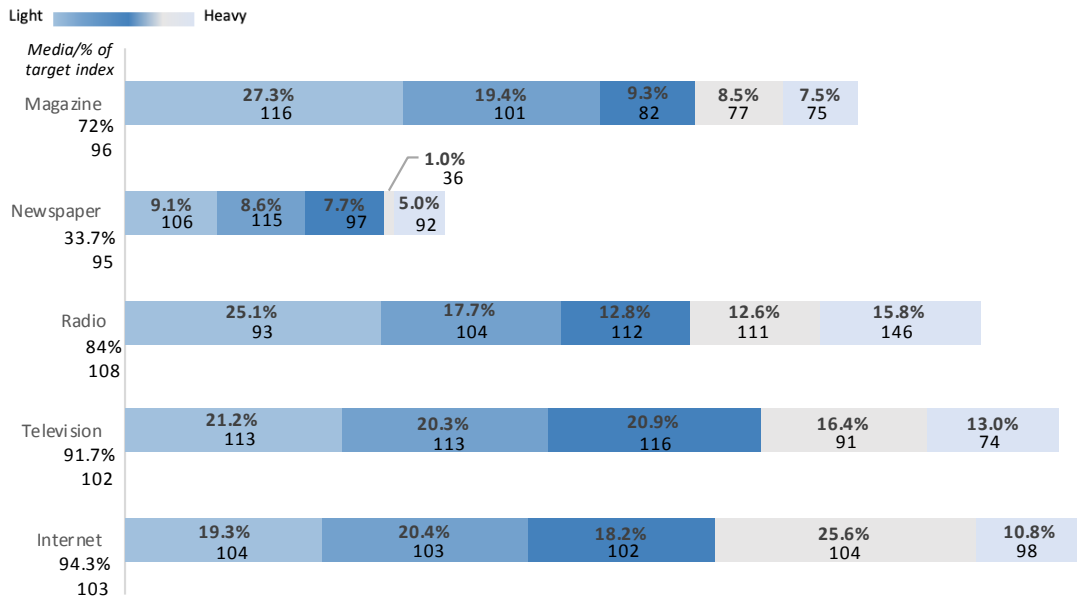
Figure 3: Male 18- to 44-year-old Age Breakdown



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

MRI-Simmons indicates that even though media consumption is shifting, the 18- to 44-year-old male audience still indexes very high (136) as heavy internet users, with 40.6% of the audience reporting heavy usage (Figure 4). Radio is the next in line, with 27.9% of the demographic seeing themselves as heavy radio listeners. While only 16.9% are heavy TV users, there is still an 83.8% reach into the target audience. Light viewership indicates that they watch selectively and supports an ongoing strategy of buying specific programming and employing audience targeting, which has performed well with other NHTSA campaigns. Audience targeting allows NHTSA to use data points, such as car ownership or an affinity for risk-taking, for example, to target specific segments of the population. This ensures the message is being delivered to 18- to 44-year-old males who are most likely to be driving. The internet continues to be the best way to reach the viewer; however, linear TV and terrestrial radio is still an essential player in ensuring NHTSA's message reaches the intended audience across all platforms.

Figure 4: Media Usage General Market 18- to 44-year-old Males

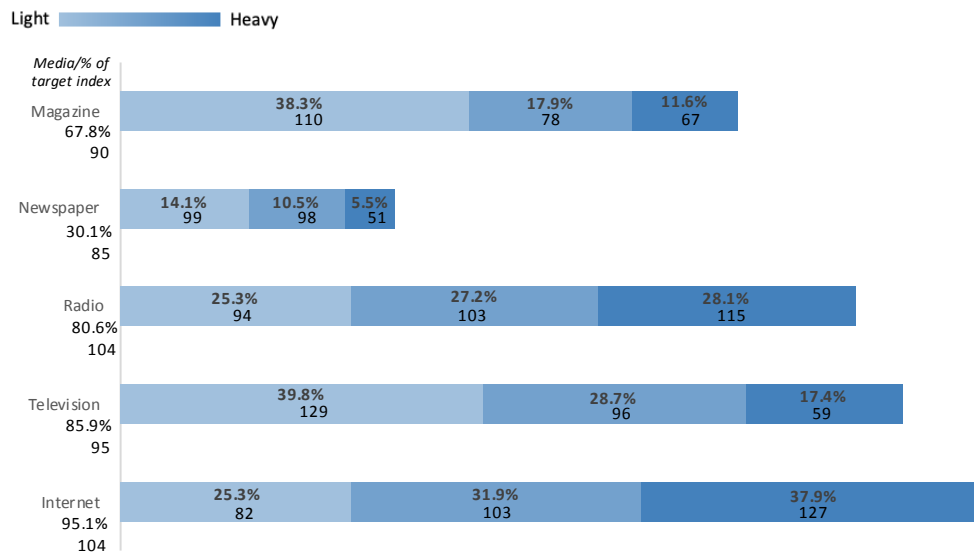


Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Comparing media usage between the generations shows some nuanced differences (Figure 5, Figure 6) that are important to consider. While both generations consume the internet, television and radio, in that order, Gen Z is 45% more likely to be the heaviest users of the internet.

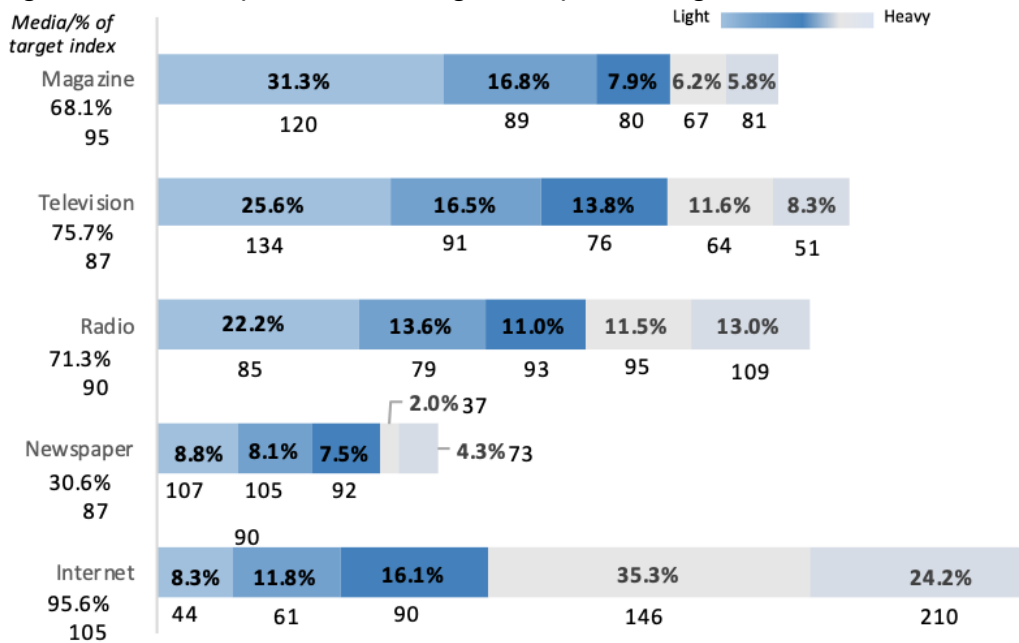
Rapid changes in technology lead this generation to gravitate toward digital media more than any generation before them. Gen Z spends an average of 5.8 hours on the internet daily, an entire hour more than their Millennial counterparts (Figure 7). Over 50% of Gen Z males consider themselves heavy internet users, while only 37.5% of Millennials are heavy users. The 14% difference is significant and is a trend that will likely continue as Gen Z ages. The impact of this will be seen in the specific recommended tactics, which will be included in the media recommendations.

Figure 5: Male Millennial (born 1977–1996 – age 26-45) Media Usage



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

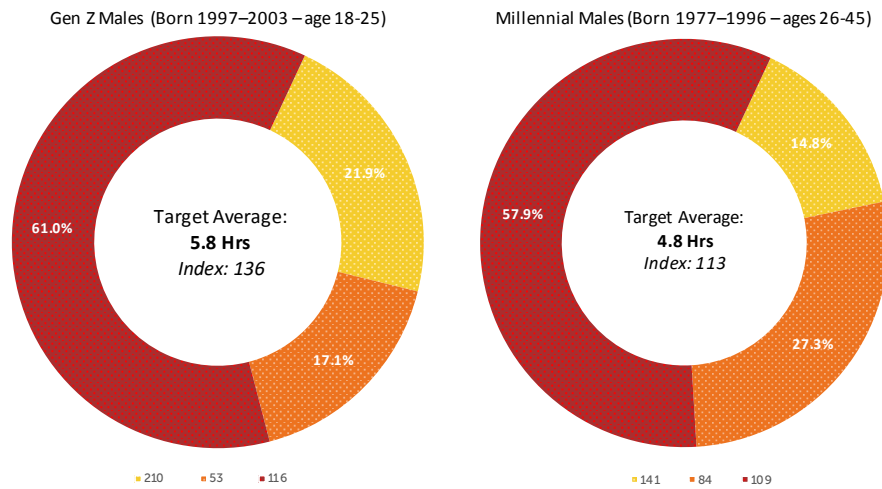
Figure 6: Male Gen Z (Born 1997–2010, age 18-25*) Media Usage



*MRI-Simmons surveys 18+ only

Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Figure 7: Hours Spent on the Internet Comparison Between Gen Z and Millennial Males



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

As Millennials make up 75% of the Speed Prevention social norming target audience, NHTSA will continue to buy across digital, TV and radio media platforms to capture the diversity of Millennials’ preferred forms of entertainment. As Gen Z increases its proportion of the target audience in the coming years, resource allocation may concentrate even more on internet-based tactics to align with their media consumption habits.

Interestingly, magazines reach almost 68% of the 18- to 44-year-old male audience, with Gen Z showing slightly higher, albeit light, usage. Light usage indicates there are specific, perhaps niche, publications that should be considered. Gen Z is 12% more likely to be light consumers of magazine content than Millennials. While it is *not* recommended to buy advertising in print magazines, knowing these trends is helpful in determining what the target audience is consuming, as these magazines all have digital counterparts. This helps select digital publishers for custom content opportunities.

Research clearly shows that media habits are diverging between the two age cohorts. These changes will be taken into consideration as we discuss individual channel strategies throughout this document.

To ensure that the entire target receives the messaging, NHTSA will select media channels that have a higher reach into the Millennial cohort, while also seeking out specific opportunities that reach Gen Z.

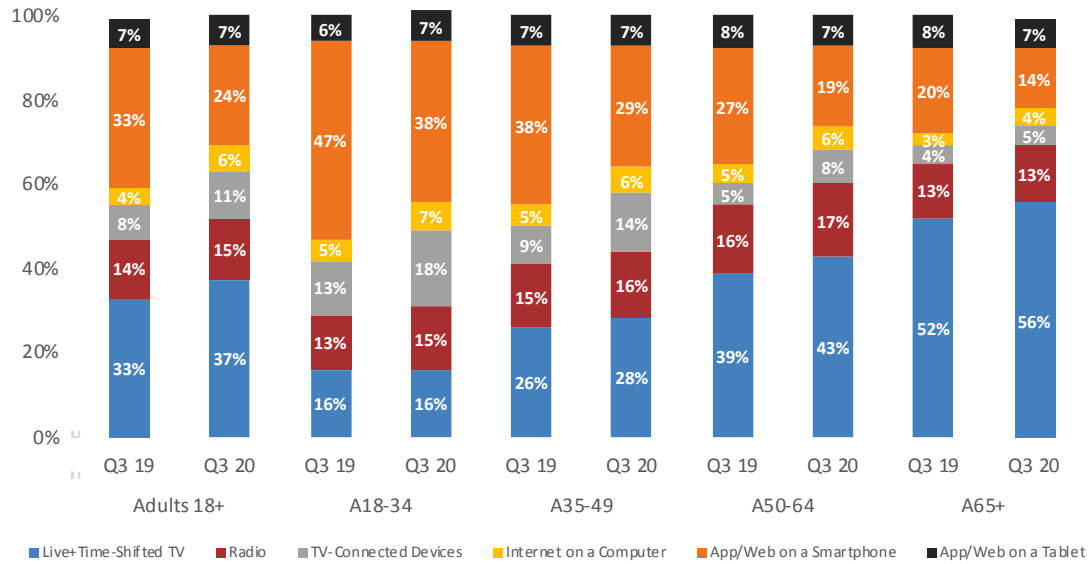
Media Environment and Selection Considerations

Technological advances are making planning media more complex, and the challenges of the last two years have added an additional layer of complexity in finding the best audiences with increased efficiency. Early on, we had little understanding about the short- and long-term effects of media usage and how that would impact consumption as people resumed normal activities. According to the most recent Nielsen Total Audience Report (August 2021), overall daily hours of media consumption actually decreased across all age segments during the

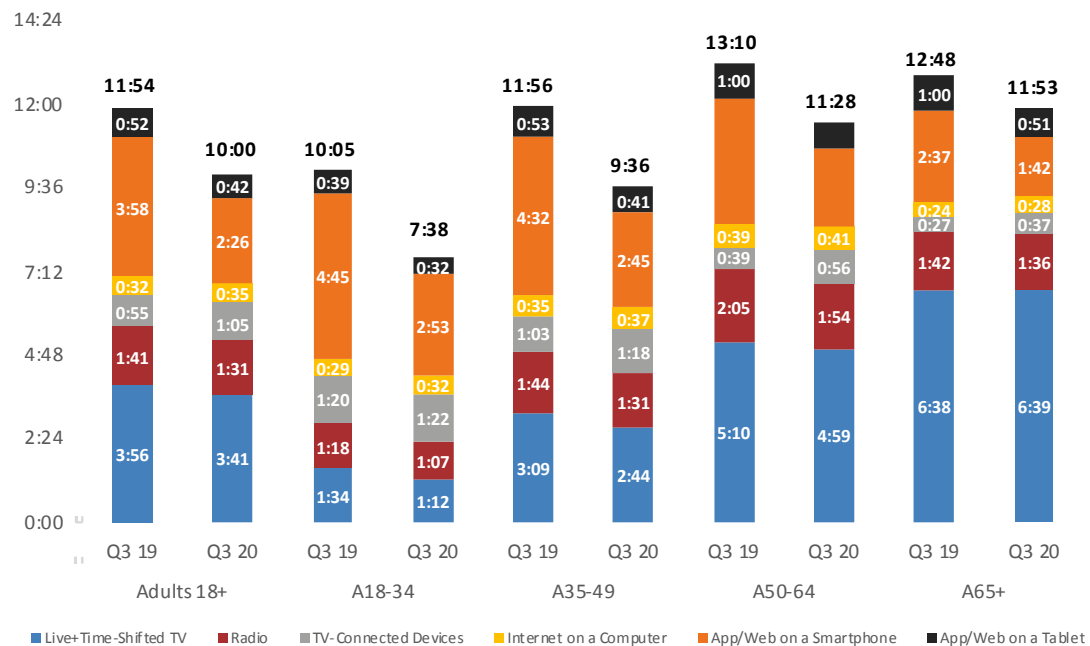
latter part of 2020 (Figure 8). This decrease in daily usage narrows the window for delivery to the target audience overall, making it important to select tactics with the highest reach.

Figure 8: Media Time (Daily Hours) by Demographic and Share of Daily Time Spent by Platform

Daily Time Spent by Demographic



Daily Time Spent by Platform

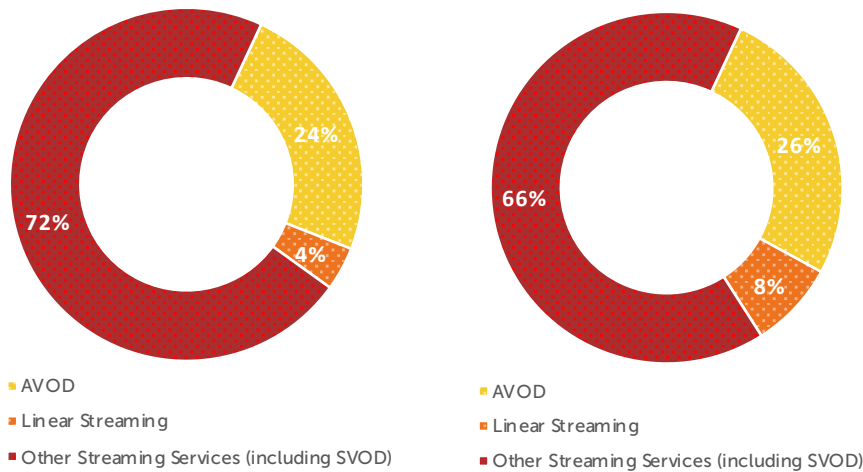


Source: Nielsen Total Audience Report, August 2021

As shown in Figure 8, smartphone usage also decreased across all age groups, but still holds the heaviest lead above other media outlets. TV-connected devices, such as video game consoles, saw the most significant year-to-year growth.

Over the past two years, media consumption has continued to trend toward streaming video while the number of streaming services has exploded. Apple TV+, Disney+, Peacock and WarnerMedia’s HBO Max service have joined Netflix, Sling TV, Hulu, YouTube TV and others to offer viewers alternatives to cable-TV-style packages. Some of these services do not offer advertising options, but the latest Nielsen Total Audience Report shows that customers are still tuning into ad-supported streaming platforms, with advertising-based video on demand (AVOD) and subscription video on demand (SVOD) both seeing growth in streaming share in 2021 (Figure 9). It is important to note that, while linear streaming saw a year-over-year decrease by 6%, the audience still consumes content, so the media strategy will continue to include both streaming and linear TV. Note: Linear streaming is very similar to cable or broadcast TV because shows are aired during specific time slots, but the difference is linear streams are delivered over the internet through an OTT service, not through a cable provider. Pluto TV is a good example of a linear streaming channel with multiple streams running simultaneously.

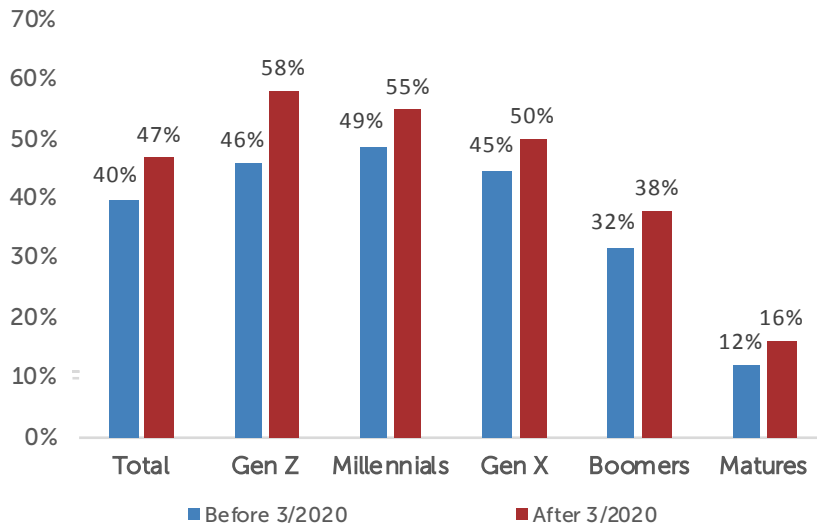
Figure 9: Share of Streaming Among Streaming-capable Homes, January 2020 and January 2021



Source: Deloitte's Digital Media Trends Survey, 2021

Deloitte research finds that ad-supported streaming rose over 7% from 2019 to 2020. Gen Z had the most significant jump, increasing usage from 46% to 58%, while Millennials grew by 6% (Figure 10). This demonstrates that the target audience is leading the way in this linear TV to AVOD shift. Deloitte reports that consumers cited that income loss in 2020 led to reduced spending on entertainment and that 65% of respondents do not mind watching ads while streaming. This could mean people adapt to ad-supported streaming and do not revert to ad-free streaming, even if they can afford it again.

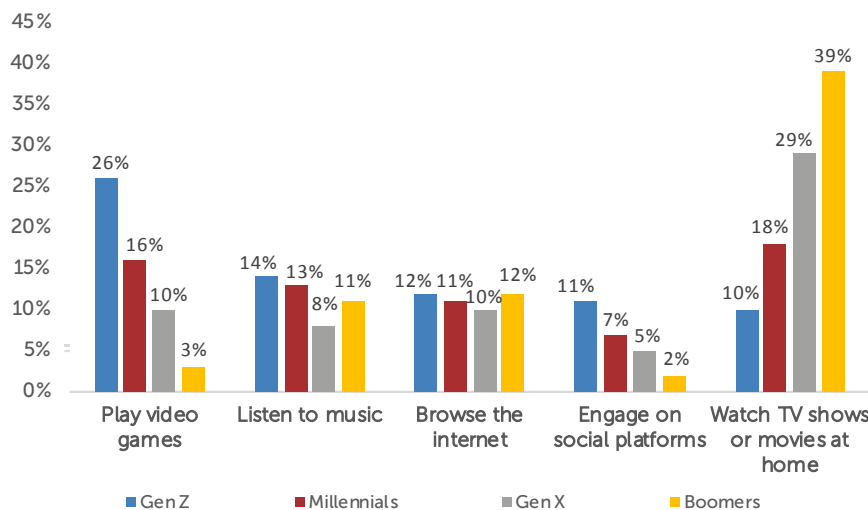
Figure 10: Free Ad-supported Streaming Has Increased Since 2020; Percentage of U.S. Households That Watch at Least One Free Ad-supported Video Service, Derived from 1,101 U.S. Consumer Observations



Source: Deloitte's Digital Media Trends Survey, 2021

Although Gen Z has seen the most significant jump in AVOD use, the generation does not consider TV one of their favorite forms of entertainment. Instead, as past media trends predicted, video games continue to drive Gen Z media consumption, with 26% listing video games as their favorite entertainment activity. Millennials, the second-highest percentage in the video game category, came in at 16% (Figure 11). Millennials tend to be more split across various media activities, with TV having the highest percentage at 18% and paid social media being the lowest at 7%.

Figure 11: Favorite Entertainment Activity Comparisons Between the Generations

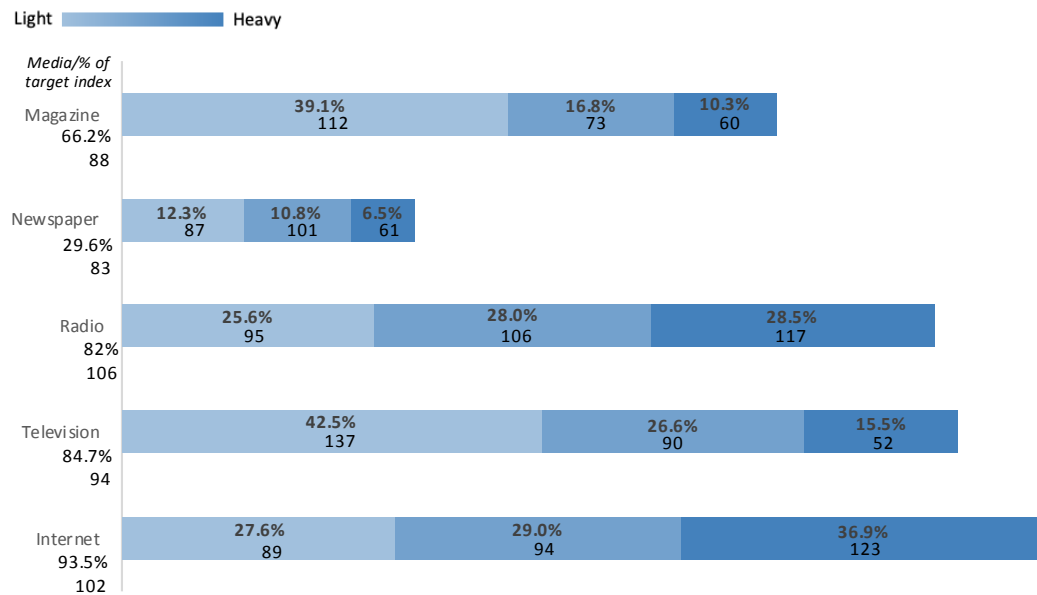


Source: Deloitte's Digital Media Trends Survey, 2021

Hispanic Consumption

Overall media usage, not to be conflated with specific consumption, is very similar between the general and the Hispanic market (Figure 12). Internet usage continues to be the most-used channel, followed by television and radio. As a result, the overall strategies and goals are similar for both targets. Tactical differences will be outlined in the media recommendations phase.

Figure 12: Hispanic Males, Ages 18- to 49-years-old Who Primarily Speak Spanish at Home



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

With these consumption trends considered, the 2022 Speed Prevention social norming media plan will explore opportunities in the mediums listed below and expand in more detail in the following sections. Media channels and opportunities will be evaluated based on their total reach potential and ability to generate that reach in a short period.

Digital

- Second screens
- Paid social media
- Publisher direct—video games and select websites
- Programmatic digital

Video

- Linear TV, including programmatic and audience targeting
- CTV/OTT

Audio

- Terrestrial (AM/FM) radio
- Streaming audio
- Podcasts

Out-of-Home (OOH)

- Digital OOH

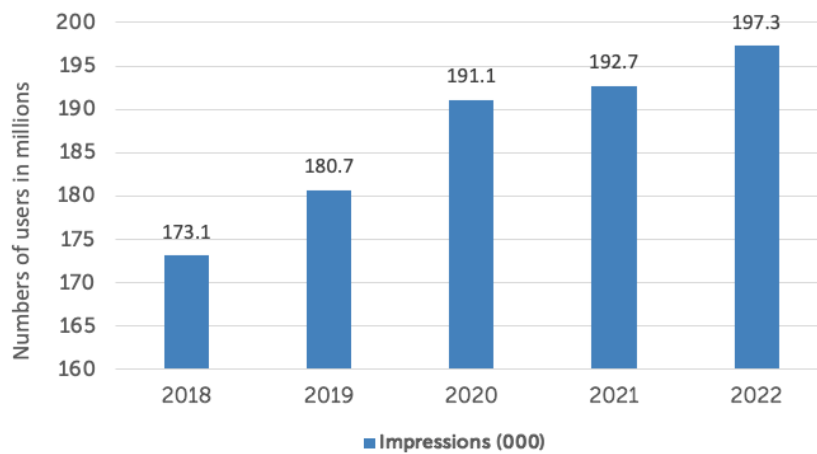
For reference, a glossary is included at the end of this document to expand on the terms outlined below.

Digital

Second Screens

Digital has become an even more prominent and important way to communicate with target audiences as users no longer give their undivided attention to TV. “Second screening” is a new term used to label the growing trend of looking at a phone, laptop or tablet and watching television simultaneously.

Figure 13: Number of Adult Simultaneous Internet and TV Users in the U.S., 2018–2022



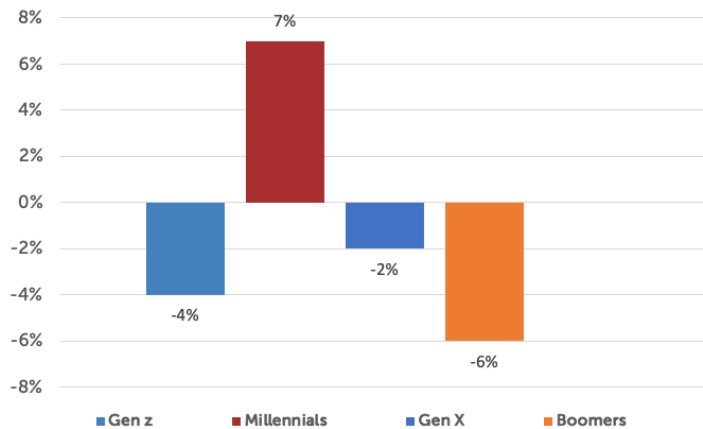
**Forecast*

Source: GlobalWebIndex Infographic

According to GWI’s data, 86% of internet users use another device while watching TV, with all age groups having adopted second-screening behaviors. In 2020, 191.1 million adults went online via a digital device while watching digital video or traditional TV. This figure is projected to surpass 197 million second-screen users in 2022 (Figure 13). TV content is struggling with retaining viewers’ undivided attention, as many viewers use their smartphones to look up content relating to the program they are watching or to casually browse the internet while watching television.

Second-screen advertising builds on the increasing trend of multitasking. By running an ad on TV and a digital ad shortly after, NHTSA will capture the attention of the target audience on their second screens (smartphones, tablets and laptops) to deliver more content from NHTSA. This provides NHTSA with the opportunity to further engage the TV audience by extending messaging to mobile. This can be done in tandem with a program or as a follow-up to watching a television segment, and is a more sophisticated way to engage with users on content, enhancing the overall experience that the user has with NHTSA’s messaging. Millennials in particular are more receptive to mobile ads while watching TV (Figure 14). Frequency caps will be used to ensure positive interactions with the campaign message.

Figure 14: Mobile Advertising Receptivity, Index Based on 59% Average Receptive at Home Watching TV



Source: Aki Mobile Advertising Receptivity Survey

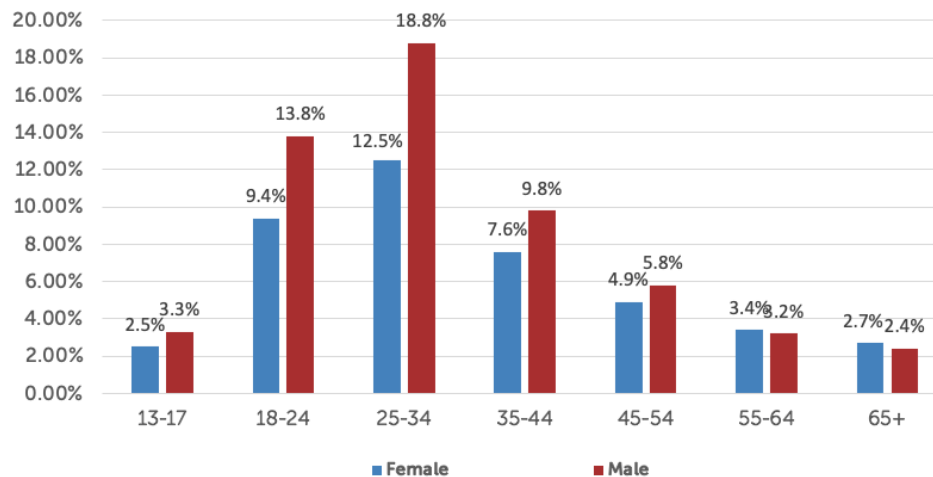
Additionally, NHTSA will leverage automatic content recognition (ACR) to assist in eliminating duplication between TV and digital impressions, which will improve the number of unique impressions across the campaign. ACR will enable NHTSA to better understand which users were served the TV ad. With this insight, NHTSA can follow up with a digital ad to the mobile devices of these TV viewers to reinforce the message. This follow-up message can be served to viewers’ mobile devices as they watch TV or as a retargeting message a week or two after viewing the TV ad. NHTSA will explore using ACR to deliver digital ads in parallel with TV ads to reinforce messaging and allow users to engage with NHTSA’s messaging on their second screen. TV-synced online advertising will enable NHTSA to intensify the messaging to users and better understand the interests and actions of its viewers to optimize better between TV and digital.

Second-screen content can either be in a display or video format. Video formats should be designed in short form and play in mute, with captioned content with disabled auto-play audio, if possible, to maximize their impact.

Paid Social Media

Social media continues to be the primary way that 18- to 44-year-old males communicate and socialize, whether it be via Facebook, Instagram, Twitch or Twitter. Males aged 18- to 44-years-old constitute the largest combined group of Facebook users, making up 42.4% of total users (Figure 15). That said, Millennials and Gen Z lean toward image-led social platforms such as Instagram (Source: Target Internet). The opportunities for individuals to find and connect with their own community and interests are seemingly ever-growing. Users have developed complex networks of friends, influencers, celebrities and brands they follow and engage with across different social media platforms. This ultimately transforms those with large followings into social influencers who act as a source of entertainment and information about services and products.

Figure 15: Share of Active Facebook Users by Age Group and Gender (July 2021)



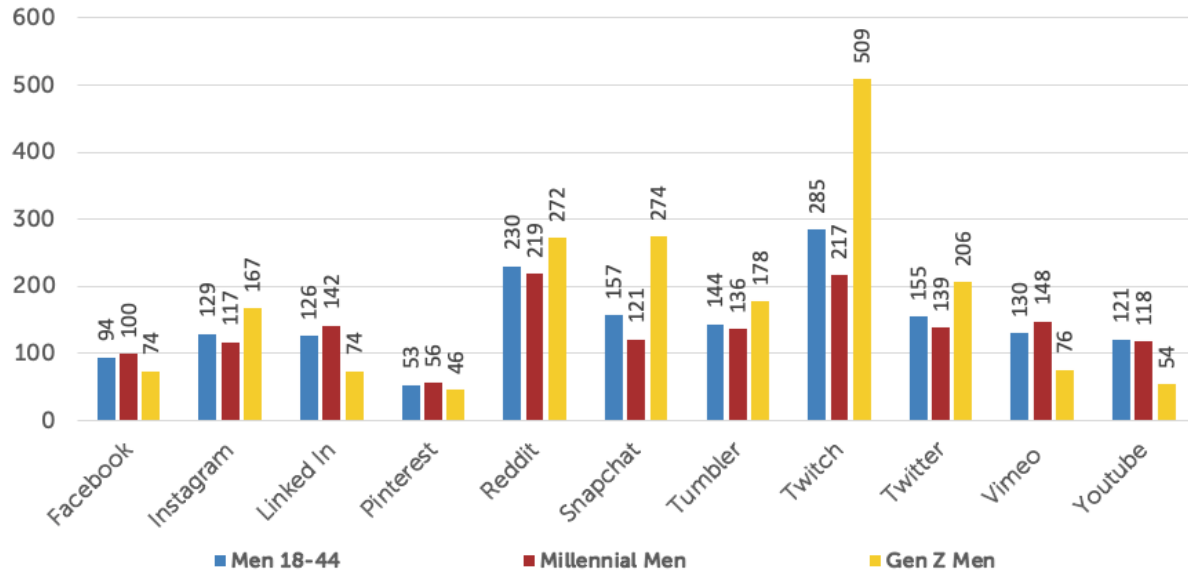
Source: Facebook

Social influencers are essentially charismatic experts that provide practical information relevant to their followers' lives. The more the target audience can identify with the online social influencer, the more likely they will click on or engage with an advertiser's message.

The nexus of paid social media influencers and gaming is an intersection that NHTSA will continue to explore. Aligning with social influencers who are gamers allows NHTSA to reach both audiences and is a good way to communicate the importance of the Speed Prevention social norming message.

According to MRI data (Figure 16), the sites/apps with the highest reach for the target audience demographic include Twitch, Reddit, Snapchat, Twitter and Instagram. Gen Z relates most to Twitch and evenly to Snapchat and Reddit. Millennials relate most to Twitch and Reddit, followed by LinkedIn, Vimeo and Twitter.

Figure 16: Paid Social Media Reach by Generation



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Overall, NHTSA will explore ways to engage the target audience through paid social media by leveraging Twitch, Twitter and Instagram through direct placements and reach 18- to 44-year-old males who use Reddit, Snapchat and Vimeo via interest targeting in programmatic, ensuring we are reaching users of the platforms without directly running on them. Additionally, NHTSA can explore gaming influencers that would resonate with this audience while in-game or watching players stream as a passive video gaming participant.

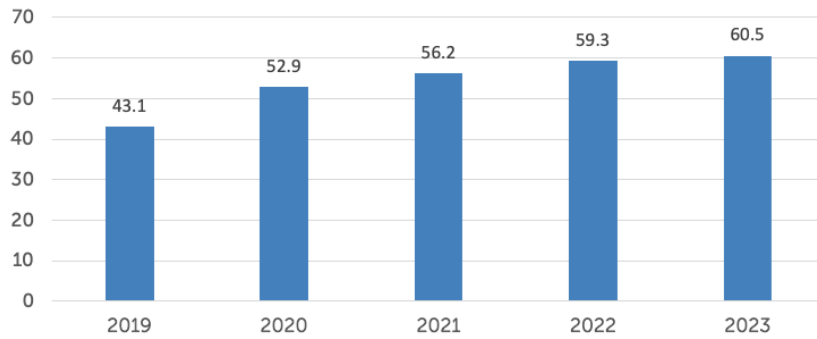
Publisher Direct

Publisher direct placements allow NHTSA to identify the websites and video games that resonate with Millennials and Gen Z and effectively leverage them to communicate with the audience. NHTSA will work with the selected publishers to build a campaign that includes high-impact placements that relate to the brand while also bringing the messaging to life in a powerful way.

Video Games

Video gaming viewership is on the rise and will be an even more dominant choice for advertisers to reach their audience as the overall number of viewers continues to grow (Figure 17).

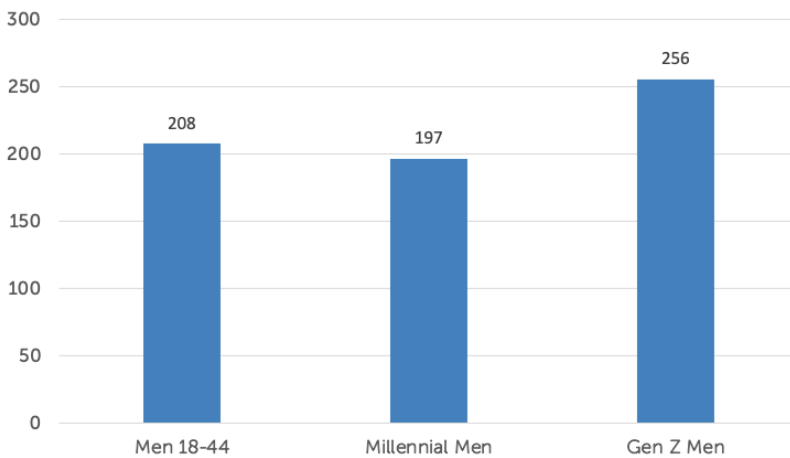
Figure 17: U.S. Gaming Video Content Viewers, Previous and Expected Growth, in Millions



Source: eMarketer February 2021

The 18- to 44-year-old male audience identifies itself as gamers and finds games more entertaining than TV (Figure 18). Gaming has become a true contender for publishers, content providers and TV shows alike, so much so that individual games, like Fortnite, are becoming direct competition for television, cable and streaming networks.

Figure 18: Indices of 18- to 44-year-old Males Who Identify as Gamers



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Gaming is the main source of entertainment for this demographic and Gen Z is poised to potentially shake up the media industry. They readily share that they spend most of their time and money on gaming.

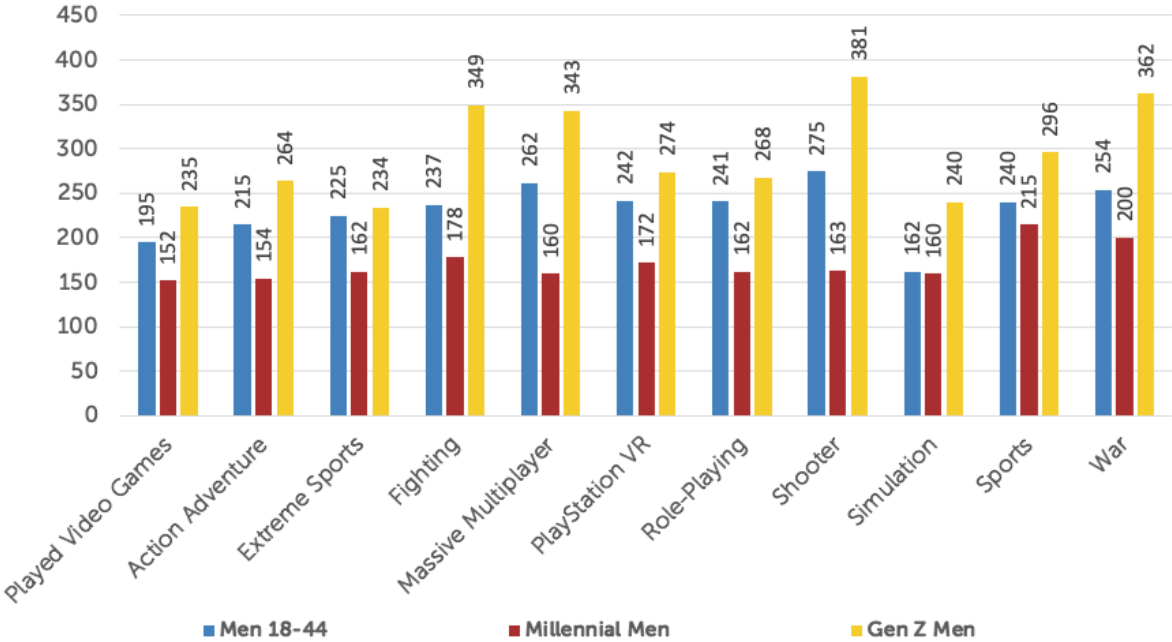
“...gaming is the favorite media and entertainment activity for Generation Z, people born between 1997 and 2006. For them, watching TV and movies at home ranks fifth, behind listening to music, browsing the Internet, and engaging on social platforms. Gaming’s appeal spans generations: 87% of Generation Z, 83% of millennials, and 79% of Generation X are playing video games on smartphones, gaming consoles, and computers at least weekly if not daily. If current trends continue, gaming could draw more audiences away from streaming TV and movie consumption.” Source: Fortune.com

Gaming is one of the most sought-after and powerful advertising vehicles today. As recognition of the power of gaming continues, technology leaders are starting to lean more heavily into the space.

“Less than two weeks after Take-Two announced its \$12.7 billion for Zynga, and just days after Microsoft announced its record breaking \$69 billion acquisition of Activision Blizzard, Netflix co-founder and co-chief executive officer Reed Hastings said Thursday that building out video gaming to where Netflix can ‘amaze our members by having the absolute best in the category’ is his goal.” Source: CNBC.com

There are many types of video gaming content for NHTSA to consider for the campaign. Figure 19 is a snapshot of the gaming genres that 18- to 44-year-old males tend to play. NHTSA will focus on genres that bring the messaging to life in a brand-safe environment. Gen Z indexes higher than Millennials across all video game types, with massive multiplayer being the highest-ranking type that is also brand-safe, while Millennials prefer sports games.

Figure 19: Types of Video Game Playing Among 18- to 44-year-old Males (Index)

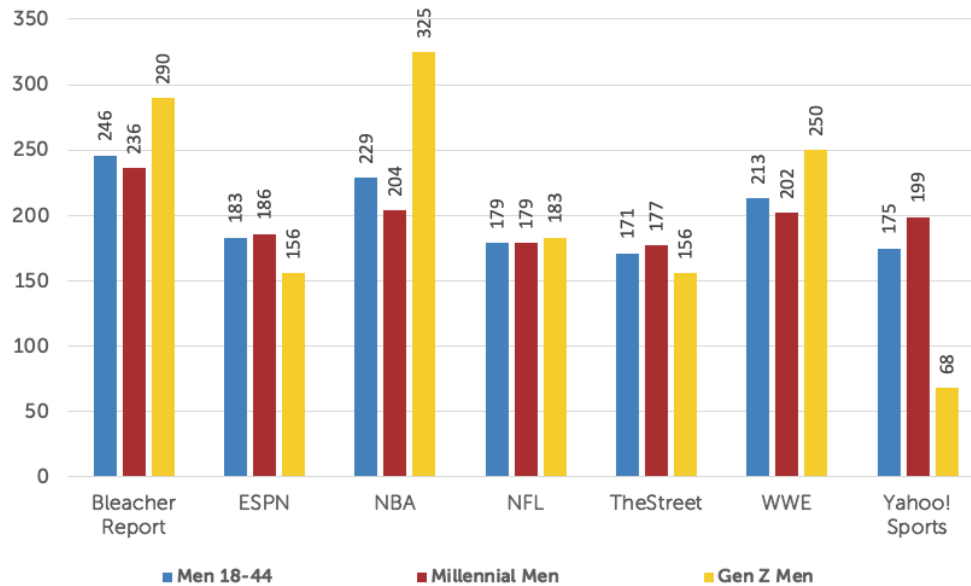


Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Select Websites

As with other NHTSA campaigns, direct publisher buys will complement the gaming, social and programmatic placements and identify a select set of websites where 18- to 44-year-old males frequent for the best value. Figure 20 is a list of the top websites visited by the target audience as outlined by MRI for consideration and the relative breakdown of Millennial and Gen Z users who visit them. Bleacher Report, NBA and WWE all index high for both Millennials and Gen Z with Millennials also showing a strong interest in ESPN and Yahoo! Sports.

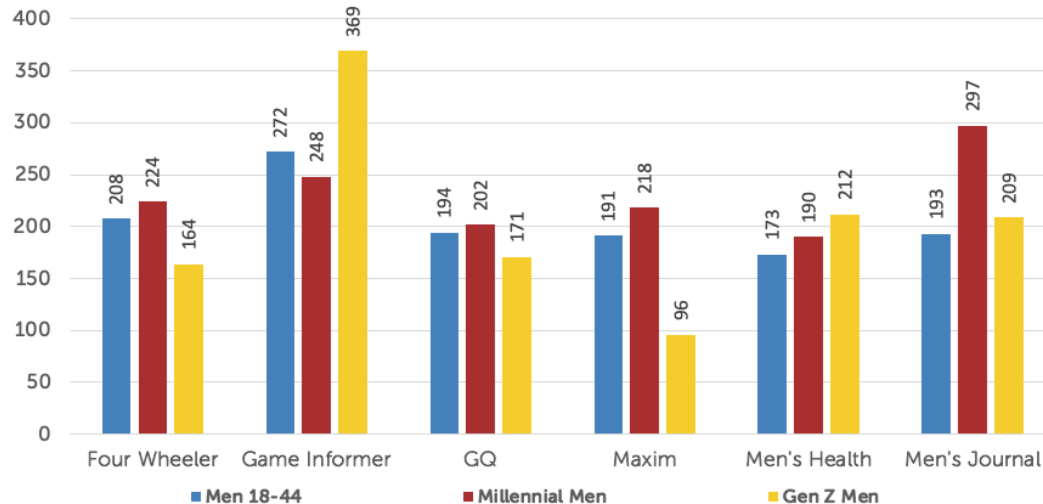
Figure 20: Top Websites Visited by 18- to 44-year-old Males (Index)



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Examining the magazine titles consumed by the target audiences also gives insight into publisher direct sites to consider. Gaming and men’s publications perform well with the target audience (Figure 21) and should be explored for digital custom content opportunities. Game Informer ranks highest for 18- to 44-year-old males and Gen Z Men while Men’s Journal resonates best with Millennials.

Figure 21: Magazines (including Digital) Consumed by Generation (Index)



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Programmatic Digital

Programmatic is the advertising vehicle that will tie all of the placements in the campaign together with a consistent and broad reach to capture the intended target audience. It will allow the message to have continuity over the flight and guarantee the target audience sees the message.

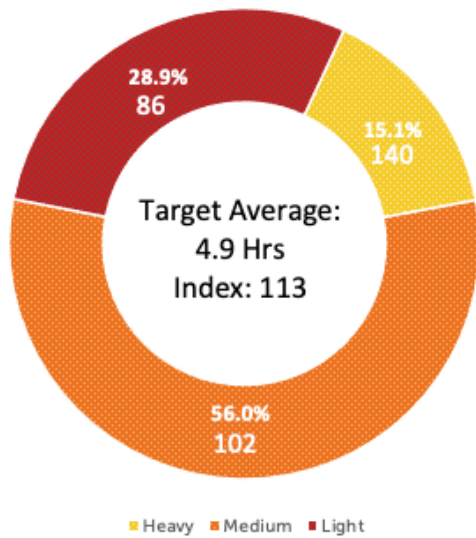
By including programmatic throughout the campaign, NHTSA will be able to balance high-impact, more costly publisher direct placements with efficient, highly targeted display, video and audio ads. Similar to other NHTSA campaigns, programmatic will lower the overall cost per thousand (CPM) of the campaign and extend the reach to 18- to 44-year-old males.

Hispanic Digital

According to the 2020 U.S. Census data, the Hispanic population in the United States has grown to 62 million. The Hispanic target audience continues to be digitally and socially connected, with nearly 96% of the target audience using the internet—slightly higher than the general population (see Figure 12).

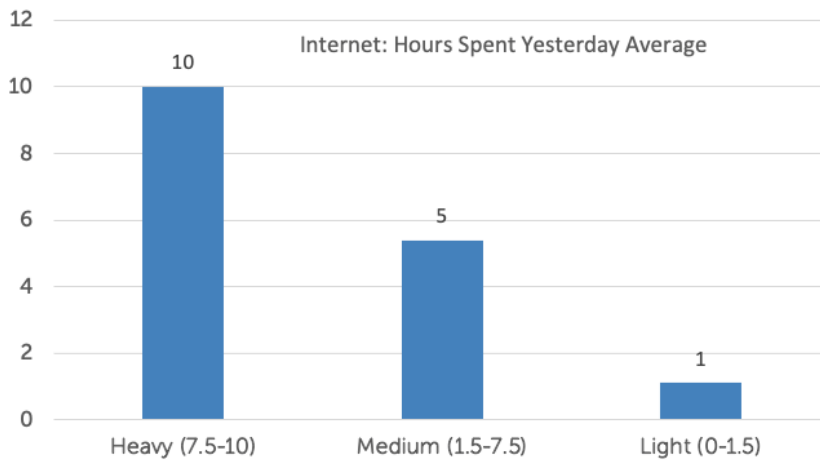
Like the general market audience, the Hispanic male target audience is spending significant amounts of time online—an average of 4.9 hours daily—and frequenting popular paid social media and video platforms during that time (Figure 22, Figure 23).

Figure 22: Daily Internet Usage by 18- to 44-year-old Hispanic Males Who Speak Mostly Spanish



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

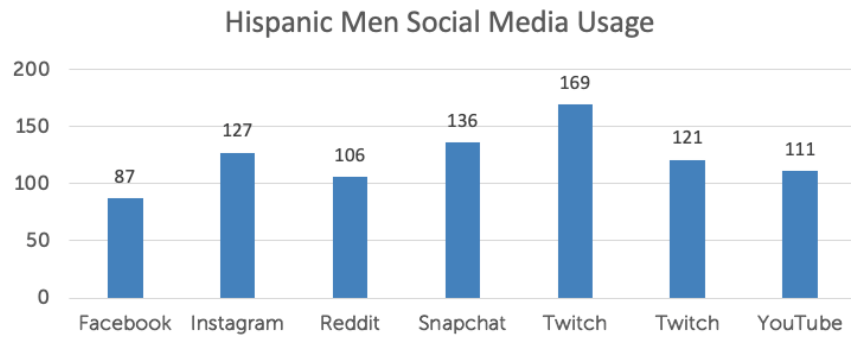
Figure 23: Daily Hours Spent Using Internet by 18- to 44-year-old Hispanic Males Who Speak Mostly Spanish



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

The social media platforms most highly consumed by the Hispanic target audience are Twitch, Snapchat, Instagram, Twitter and YouTube, in that order. These platforms will continue to be key components in reaching the target audience for the 2022 campaign (Figure 24).

Figure 24: Social Media Reach of 18- to 44-year-old Hispanic Males Who Speak Mostly Spanish



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Publisher direct placements via display, video and high-impact units will be leveraged to reach the Hispanic target audience on the Spanish-language sites they use the most. NHTSA will leverage demographic, behavioral and contextual insights to connect with the target audience. Examples of contextual targeting might include layering in “enjoys taking risks” or “heavy social media users” to the demographic targeting.

The Hispanic secondary audience for the campaign will also be reached programmatically. While proportionally smaller in population, there is little difference in consumption, and the same streaming services and apps provide many opportunities to connect with the Hispanic target audience.

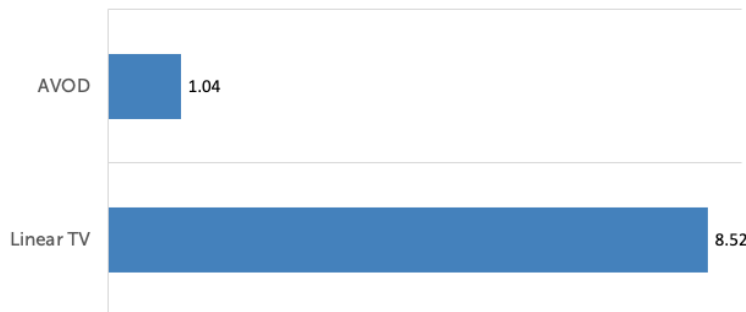
Video

The video landscape continues to change, allowing users to view video content across linear TV and cable, satellite, CTV and OTT using advanced TV, gaming consoles, etc. These choices have boosted overall viewership on both linear and streaming services, and both are key in providing brand awareness. Moving into 2022, streaming is commanding more and more viewer time, and the budgets will be allocated accordingly. While linear is still needed to reach audiences, especially the older age cohorts, CTV and OTT are becoming the primary placement to reach the younger audience. All of the following video delivery methods will be explored and assembled into a well-rounded media plan.

Linear TV

Linear TV refers to watching a program on the channel it's presented on at its scheduled time. For example, if you watch "NCIS" on CBS at 9 p.m. on Monday when it premieres, then that is considered a linear TV viewing experience. This remains an important delivery vehicle for the Speed Prevention message, thanks to the reach and impressions it provides. Simulmedia research indicates that linear TV still offers an estimated 8.54 trillion yearly impressions (Figure 25). That is a significant figure compared to AVOD, which falls 7 trillion impressions behind linear TV. Gen Z and Millennials are less likely to be heavy TV users, but live sports continue to be the primary driver of both generations' TV-viewing habits.

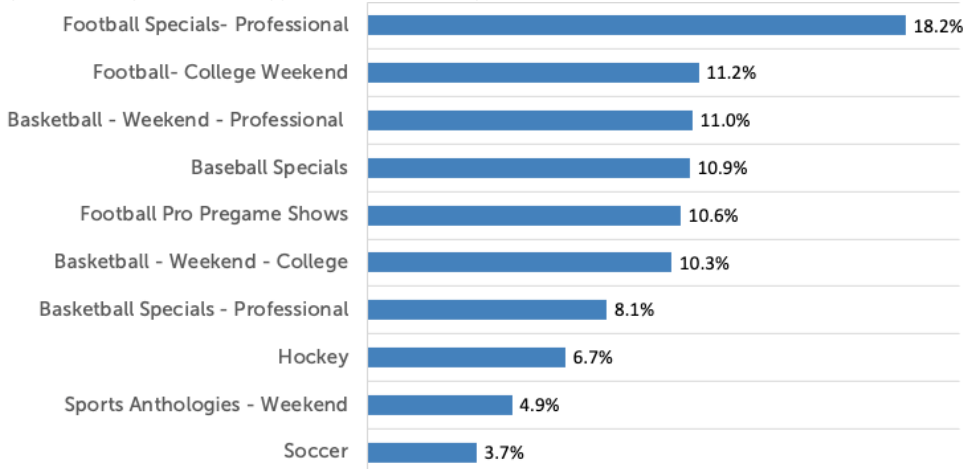
Figure 25: Estimated Impressions of 2020, in Trillions



Source: Simulmedia, *OTT, Linear TV, or Both? 2021*

Live sports consistently fuel linear TV impressions for 18- to 44-year-old males; professional football, baseball and basketball have the biggest draw for the target audience as a whole (Figure 26). Live sports are more likely to be watched in real-time to avoid spoilers of the game's outcome.

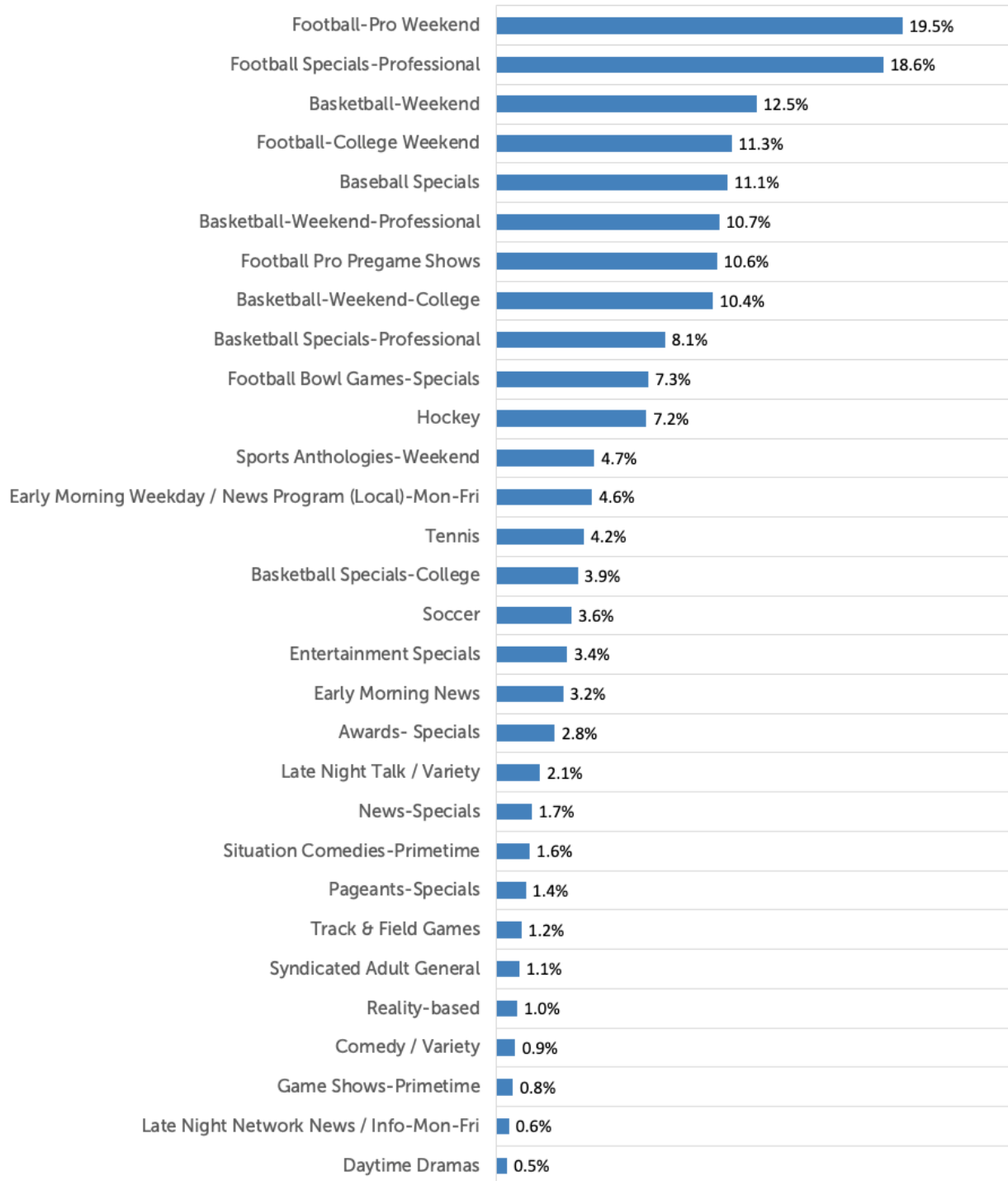
Figure 26: Top TV Show Types For 18- to 44-year-old Males



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

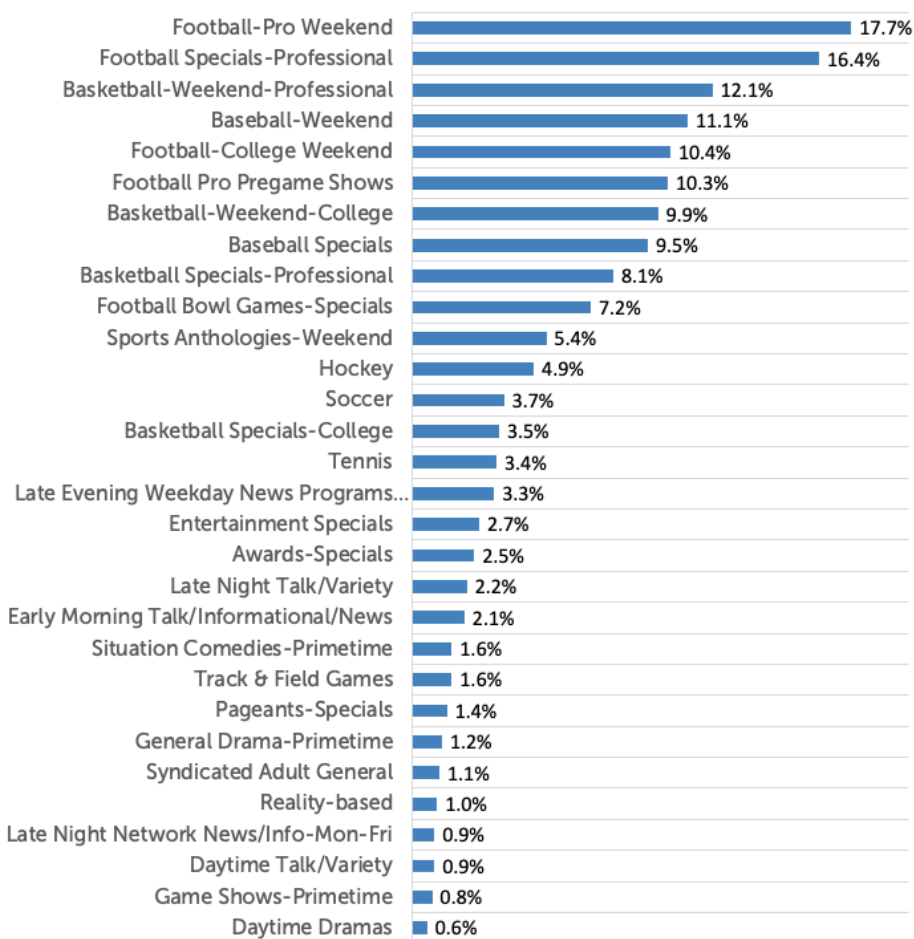
Sports viewership dominates across generations, but data reveals differences in the areas of interest. Professional football holds the highest audience percentage for males 18- to 44-years-old. (Figure 27, Figure 28).

Figure 27: Top TV Show Types for Millennial Males



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Figure 28: Top TV Show Types for Gen Z Males



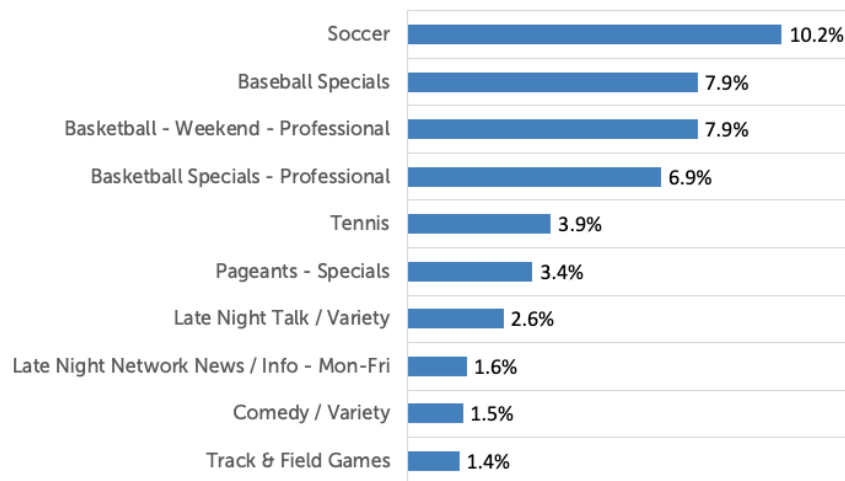
Source: 2021 Doublebase GfK MRI Weighted to Population (000)

The 2022 Speed social norming flight falls during a time when there are not a significant number of sporting events being played, so in-game options are limited. NHTSA will look to be in Major League Baseball (MLB) programming, NFL preseason programming, as well as explore any auto racing events where the social norming messaging could creatively be woven into the content. In addition, NHTSA will continue to utilize programmatic buying efficiency, targeting avid sports viewers to ensure messaging is running on the target audience’s programs.

Hispanic Linear TV

Like the general market target audience, the Hispanic target audience is more likely to be a light linear TV viewer (see Figure 12). The strategy will mirror the general market in that it will focus linear TV buying on programming that indexes above average with the target. While soccer dominates the Hispanic target audience’s viewing (Figure 29), there are no games during the flight dates. Instead, MLB games and audience targeting methods targeting avid sports viewers will drive the linear TV programming selection.

Figure 29: Soccer Dominates Viewing for 18- to 44-year-old Hispanic Males Who Speak Mostly Spanish



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Connected TV/Over-the-Top (CTV/OTT)

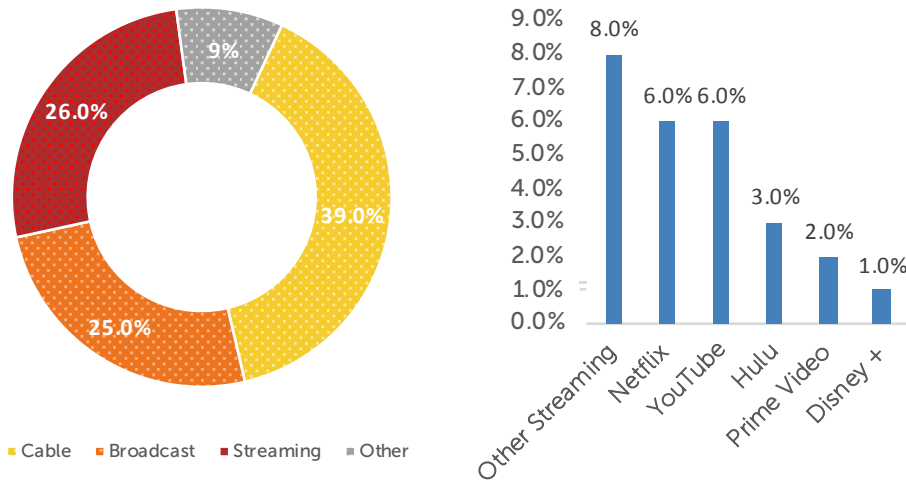
How we watch television has changed. In a little more than a decade, television has undergone a dramatic transformation from scheduled cable programs to on-demand streaming services with an explosion of new content, streaming apps and devices from which consumers can watch. Connected TV (CTV) enables new formats, advanced measurement, personalization, higher completion rates and access to cord-cutter and cord-never audiences, who can't be reached through linear TV.

CTV can be used as broad video impressions to complement linear TV tactics. The good news is that in general, the viewer does not distinguish between CTV and linear TV—for them, CTV and linear TV are pretty much the same things: they both make content available to watch on the biggest screen in the house. While linear TV offers broad reach and is a necessary component of the Speed Prevention media plan, CTV offers a deeper level of audience targeting and NHTSA has the opportunity to overlay interactive elements on an ad to create viewer interaction as well.

A study by the Association of National Advertisers (ANA) and analytics firm Innovid found that even ad-averse consumers devote time to advertising if it resonates with them (source: [The State of Connected TV Report, 2020](#)). The research tested various formats, including browsable gallery and QR codes, and found that branded video vignettes in 30-second interactive CTV ads generated 71 seconds of time earned on average, while 15-second clips had 67 incremental seconds.

In 2021, Nielsen reported that streaming now makes up 26% of all TV viewership (Figure 30). This put streaming slightly ahead of linear TV, but it has yet to catch up to cable. Thanks to the 18- to 44-year-old audience, streaming saw the largest jump in users and will be a key component of the campaign.

Figure 30: Nielsen's Total TV and Streaming Snapshot and Breakdown of 26% Streaming



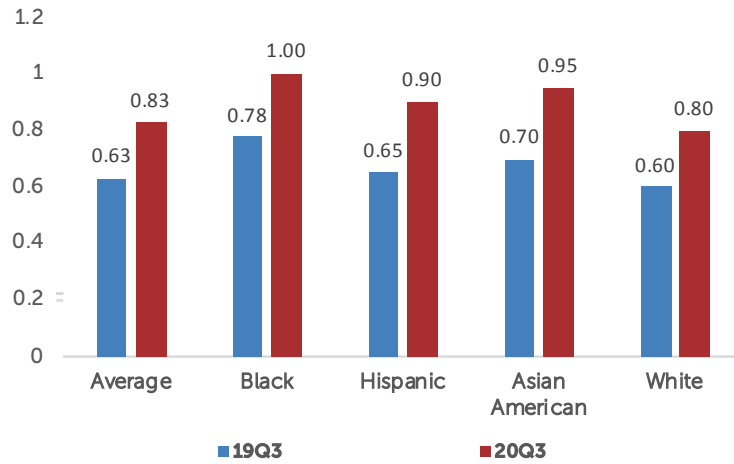
Source: Nielsen Total Audience Report, August 2021

Platforms like YouTube and Hulu, which allow advertising and reach a large portion of the streaming audience, are valuable partners to consider for the Speed social norming campaign. Past NHTSA campaigns have successfully reached a similar target audience and will be strongly considered once again in 2022.

Hispanic Video

Hispanic viewers are rapidly turning to streaming services, spending almost 40% more time each day using a connected device year over year (Figure 31). In fact, Hispanics are the largest non-white group using CTV, as the penetration of linear TV among Hispanics continues to decline (Figure 32). For this reason, CTV and OTT platforms will be a primary tactic of the Hispanic strategy to extend the reach of the TV plan. Similar to the general market plan, a multi-screen approach will be used to deliver the Speed Prevention social norming message to the Hispanic target audience.

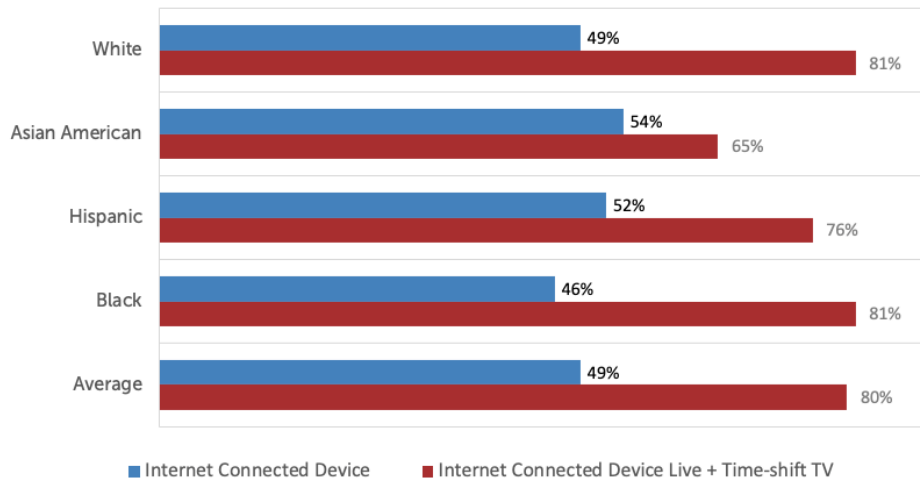
Figure 31: U.S. Adult Time Spent Using a Connected TV Device 2019 vs. 2020 (Hours Per Day)



Source: Nielsen Total Audience Report, March 2021

Figure 32: Hispanics Are the Largest Ethnic Group Using CTV

Traditional and Connected TV Penetration in US by Ethnic Group



Source: Nielsen Total Audience Report, March 2021

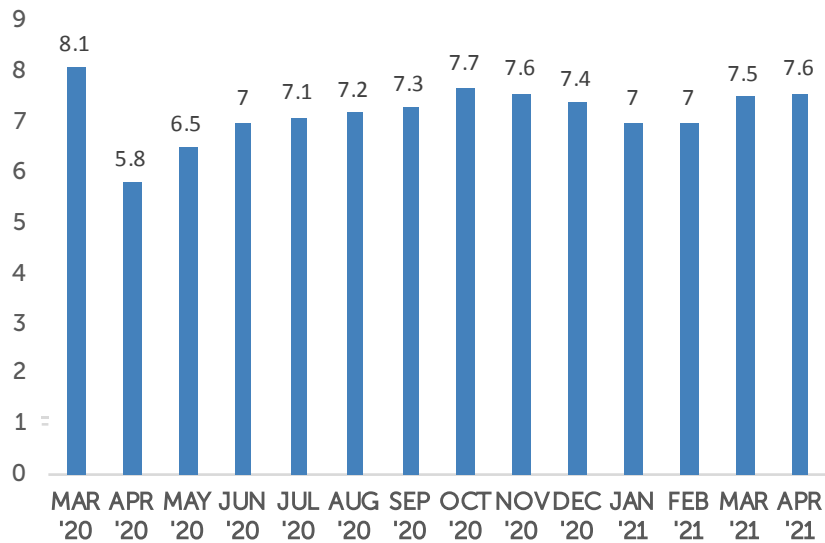
Audio

Audio via terrestrial radio is another dominant reach vehicle and will be an important campaign component for both the general market and Hispanic target audiences. Digital audio, particularly podcasts, will be considered to reach the audiences in their cars and likely to make a choice to speed.

Terrestrial Radio

According to Nielsen media research data, radio listening levels are returning to pre-March 2020 numbers. Due to global events, fewer commuters were listening during popular drive times, but terrestrial radio rebounded toward the end of 2020 into 2021 (Figure 33). With a stable audience base and variety of platforms, radio remains a critical touchpoint to reach the target audience when they are driving. Radio and streaming audio tactics are an important component of the =campaign.

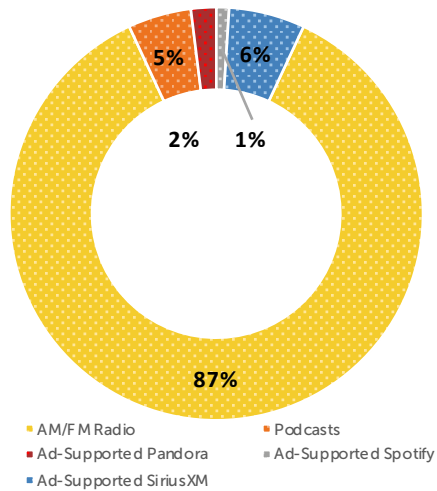
Figure 33: Radio's Average Quarter Hour (AQH) Ratings Now Highest Since Q4 2020 (in Millions)



Source: Nielsen Mar 20—Apr 21 Persons 12+ M-Su 6a-12m AQH Persons

Terrestrial radio remains a cost-efficient way to reach the target audience. In addition to low CPMs, it is one of the only remaining tactics in which partners can offer large added value packages to NHTSA with both the general and Hispanic market. The audio market is seeing more ad-supported digital radio competitors, but terrestrial continues to dominate audio time spent in the car, holding on to 87% of listeners (Figure 34).

Figure 34: Percentage of Ad-Supported Audio Time Spent in the Car



Source: Edison Research Share of Ear Q1 2021 P18+

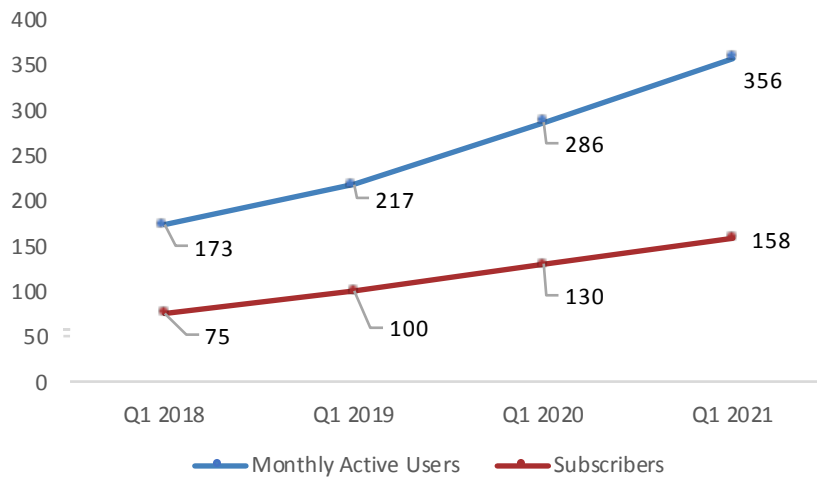
The leading radio networks, iHeartMedia and Westwood One, will continue to be researched as primary radio partners for the general market, while high-indexing networks such as Univision, Entravision and SBS/Aire will be explored for the Hispanic market. In addition to running the NHTSA-produced spots, these networks will be challenged to integrate the use of their on-air talent into the plans and engage with their vast social networks. These extensions will capitalize on existing listener relationships with trusted local voices to deliver the message.

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Streaming Audio

Streaming audio still falls far behind terrestrial radio when it comes to in-car listeners, even with Spotify reporting a 24% annual growth rate since 2017 (Figure 35). Pandora and Spotify, which have significant subscriber bases who avoid advertising altogether, hold only 3% of the ad-supported share of ear in the car.

Figure 35: Spotify's Subscriber Growth, in Millions



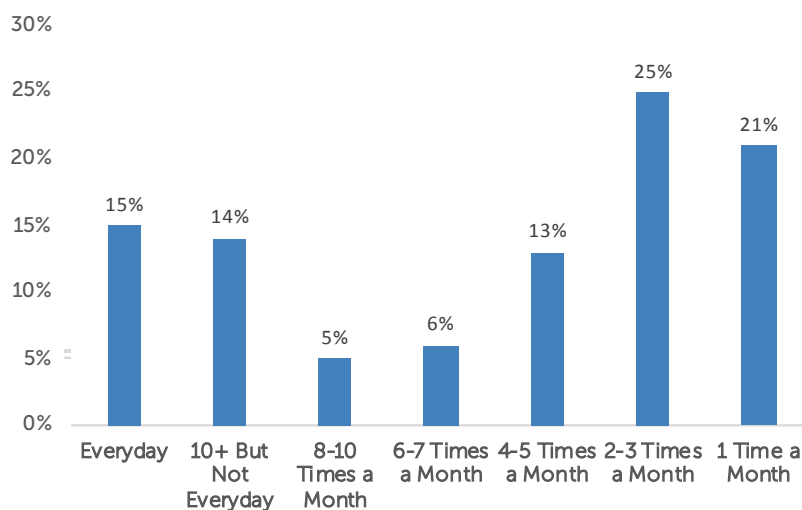
Source: Spotify 2021

As subscription-based memberships continue to grow, available impressions will be harder to come by on ad-supported streaming services. It will be important not to overestimate the number of impressions that can be purchased during short flights.

Podcasts

The overall popularity of podcasts continues to grow, with Nielsen reporting that 15% of adults 18-years-old and older listen to podcasts every day, and 53.8% listen to podcasts at least once a week (Figure 36). Podcast listeners tend to be more receptive to the ads they hear on podcasts due to the influence and trust in the host.

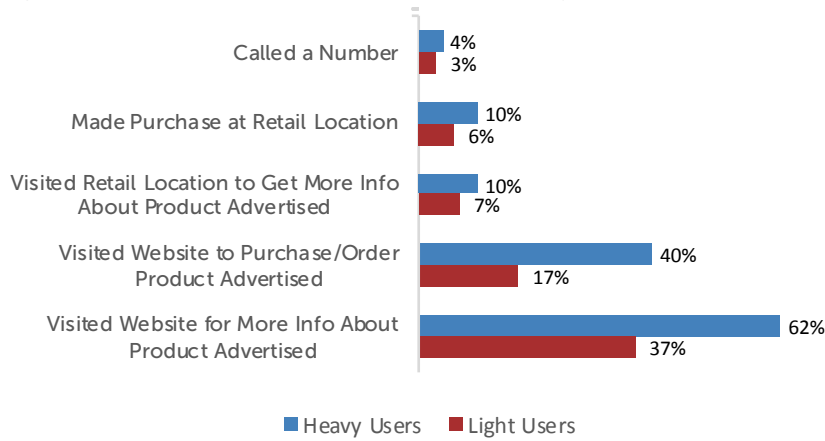
Figure 36: Podcast Listener Frequency



Source: Nielsen Scarborough Podcast Listener Buying Power, November 2020

Approximately 62% of heavy podcast users have visited a website for more information after hearing an ad on a podcast (Figure 37), which indicates a high level of engagement with the programming.

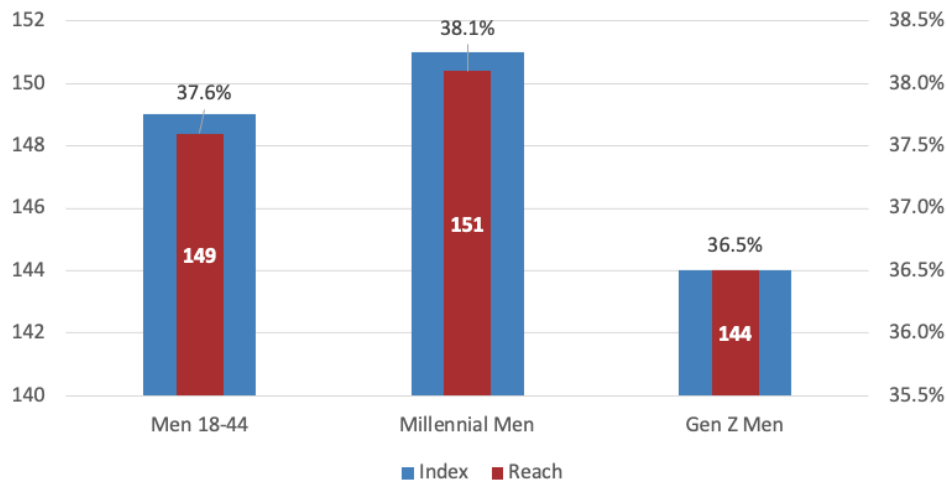
Figure 37: How Podcast Listeners React to Ads They Hear



Source: Nielsen Scarborough Podcast Listener Buying Power, November 2020

The reach of podcasts has continually grown within the target audience. Males 18- to 44-years-old now have a reach of 37.6%, and these listeners are 49% more likely than other men to listen to podcasts (Figure 38).

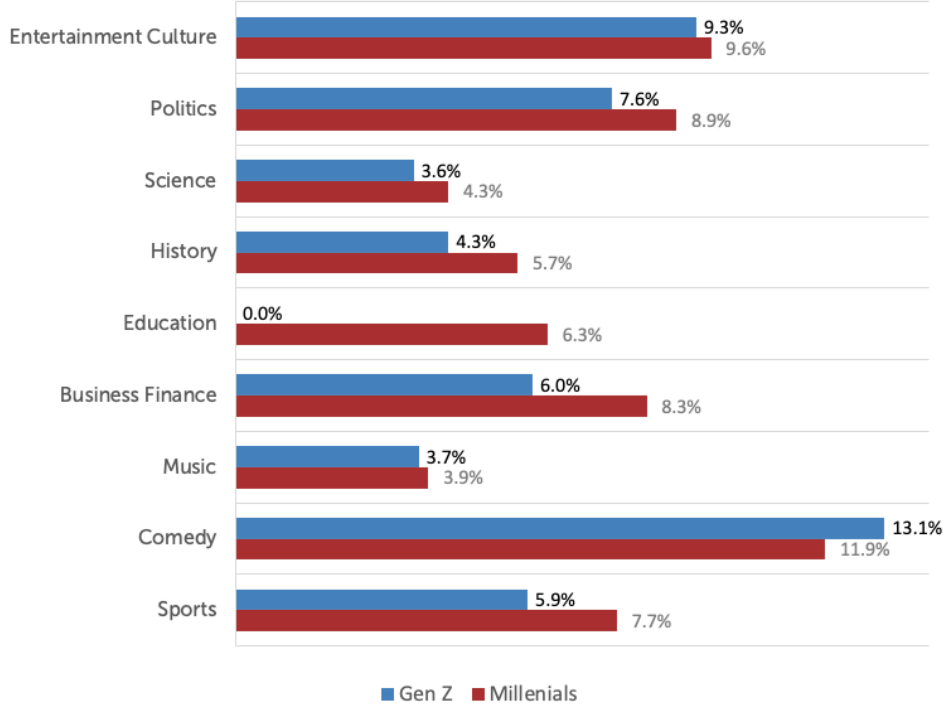
Figure 38: Podcast Reach/Index by Generation



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

While there is a negligible difference in listenership between the generations, there are nuanced differences in the genre preferred among the two age cohorts. The top-performing podcast genre for both generations is comedy, but Gen Z has a stronger preference. Millennials have a stronger preference for sports (Figure 39). However, podcasts are one of the few areas where sports do not dominate the platform across the entire target audience. This makes the tactic valuable in reaching non-sports fans in the target audience.

Figure 39: Top Podcast Genres by Generation

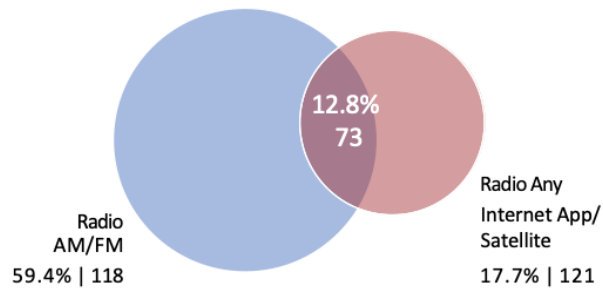


Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Hispanic Audio

Terrestrial radio continues to be a critical touchpoint to reach the Hispanic target audience. Terrestrial radio over-indexes (118) and represents 59.4% of the target audience consuming terrestrial radio (Figure 40), while streaming/podcast radio tactics are key components of the 2022 Speed Prevention social norming campaign to support the always-on strategy and help build frequency to the overall radio campaign.

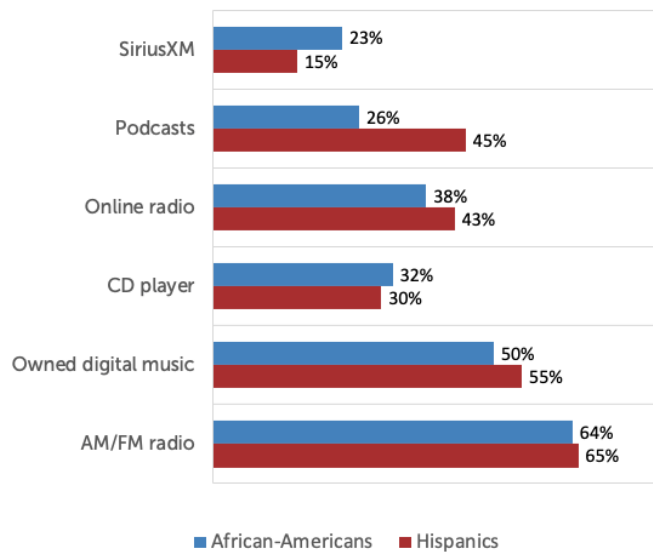
Figure 40: Audio Listenership Among 18- to 44-year-old Hispanic Males Who Speak Mostly Spanish at Home



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

AM/FM radio ranks the highest as an audio source used in vehicles among Hispanics, 65% of whom currently use the radio in the car, and is still significantly higher than owned digital music or digital radio (Figure 41).

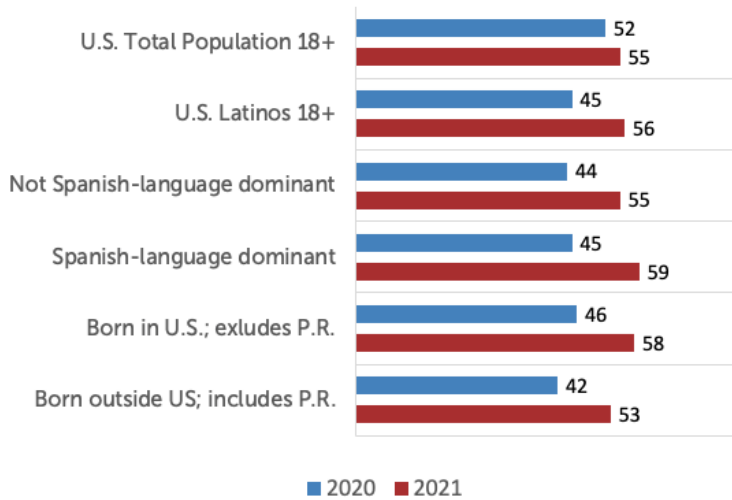
Figure 41: In-Car Listening by African Americans and Hispanics



Source: *The Infinite Dial*, 2021

Podcasts are also continuing to grow with Spanish-language dominant listeners and will be considered based on the top genres for the target audience (Figure 42).

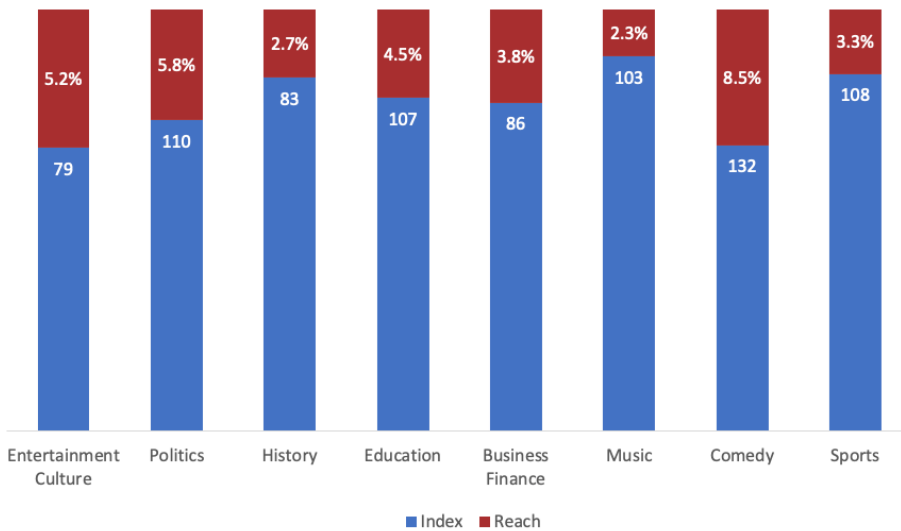
Figure 42: Year-over-year Podcast Growth



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Similar to the general market target audience, the Hispanic target audience also prefers comedy, but has less affinity toward sports (Figure 43).

Figure 43: Top Podcast Genres by 18- to 44-year-old Hispanic Males Who Mainly Speak Spanish (Reach/Index)

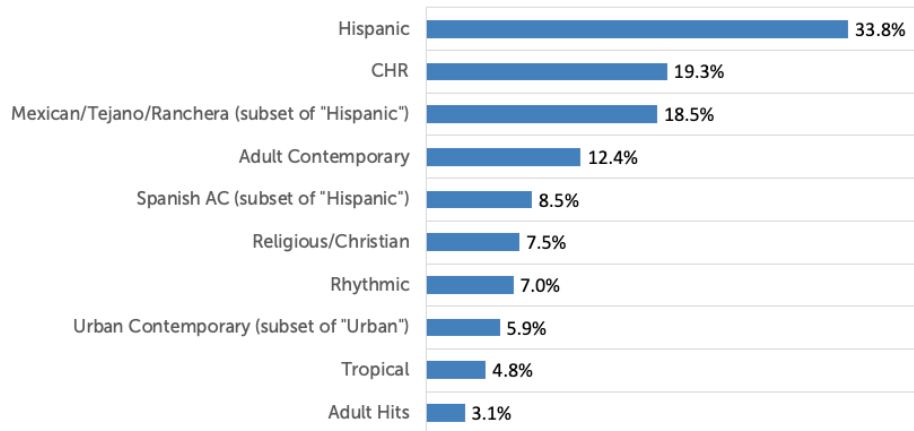


Source: 2021 Doublebase GfK MRI Weighted to Population (000)

The Hispanic radio plan will include streaming audio platforms and podcasts as critical touchpoints to maximize the effectiveness of the radio plan by reaching the target while in the car or when listening to content and programming for entertainment or during their leisure time. The radio plan will also include radio formats such as Regional Mexican and Spanish adult-contemporary (AC) that over-index with the target audience (Figure 44).

It's important to note that general market contemporary hit radio (CHR) and AC formats both have significant reach into this target, indicating that they will receive messaging from the general market radio plan

Figure 44: Top Performing Radio Formats with 18- to 44-year-old Hispanic Males Who Mainly Speak Spanish



Source: 2021 Doublebase GfK MRI Weighted to Population (000)

Out-of-Home

Digital OOH advertising reaches people when they are on the go and can be leveraged to retarget mobile devices that were exposed to add frequency to the messaging. Increasingly, OOH opportunities can be considered for NHTSA campaigns due to the rising availability of digital options that can be turned on and off in alignment with the short campaign flight dates. While nationwide penetration of digital billboards is still a work in progress, OOH opportunities like TV visible signage and digital gas station video placements offer strong potential for exploration.

Video display ads are also being found in more venues that can reach 18- to 44-year-old males while they commute or run daily errands. Video ads run in bars, gas stations and gyms index especially high for this demographic. Using vendors, such as Atmosphere TV and Gas Station TV, on past NHTSA campaigns has allowed campaign messaging to run and reach people where it is needed most—before they drive. The message can be boosted through location targeting and high-indexing retail points for this target audience through OOH in the designated market areas (DMA) with the most rail-related incidents.

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.

TV

The national plan will use linear and programmatic TV and OTT/CTV to reach the target audience with entertainment, non-sports programming. This will run on appropriate cable inventory, network apps via full episode players and OTT services. The state-level plans can build on 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.

Radio

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

Digital

Digital media is used heavily by the target audience and a digital effort should be a major part of state-level plans. This can include the use of publisher direct efforts outside of those sites on the national plan, online video, CTV/OTT, audio streaming, podcasts and display. Social media also plays a very important role in the life of the target audiences and is recommended for state-level plans. Digital can be geotargeted to reach users in a specific geographic area, which avoids waste and lowers costs.

Rural Markets

If state-specific data indicates that the Speed Prevention social norming 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 linear TV, radio and OOH buys. This should only be considered applicable for states that have rural market issues to factor into plans.

Glossary

TV

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

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

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

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 taking steps to ensure that ads do not run adjacent to content that goes against brand guidelines.

Connected TV (CTV): Another term for Smart TV; refers to any TV that can be connected to the internet and access content beyond what is available via the normal 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, in addition to regular TV content.

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

Over-the-top (OTT): A device connected to a TV that provides streaming media as a stand-alone product directly 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.

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

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

Subscription Video on Demand (SVOD): Similar to pay-TV packages, SVOD allows consumers to access an entire catalog of content 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.

Radio

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

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).

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

Digital

Esports: A multiplayer video game competition played for spectators, often team-based and played for prize money. Esports are also live-streamed and involve commentators and analyses like "traditional" sports, such as football, baseball and basketball.

Geotargeting: The method of delivering different content to visitors based on their geolocation. This includes country, region/state, city, metro code/zip code, organization, IP address, ISP or other criteria.

Live-streaming: A gamer sharing his or her gaming experience with fans/followers by live broadcasting the game that they are playing. Some streamers consistently play the same games and others try different games or follow trends.

Lookalike Audiences: Audiences of people who have never interacted with content who the algorithm believes are similar to one of the active custom audiences.

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.

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

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

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 that are viewed in their entirety or until 30 seconds have elapsed.

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.

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