



2023 STRATEGIC COMMUNICATIONS FORUM



EVOLUTION OF MEDIA BUYING

Agenda

State of Media Landscape and Planning Process

- Evolving landscape
- Usage trends
- Media planning best practices

State of Multicultural

- Evolving targeting and creative

Channel Planning in a Digital World

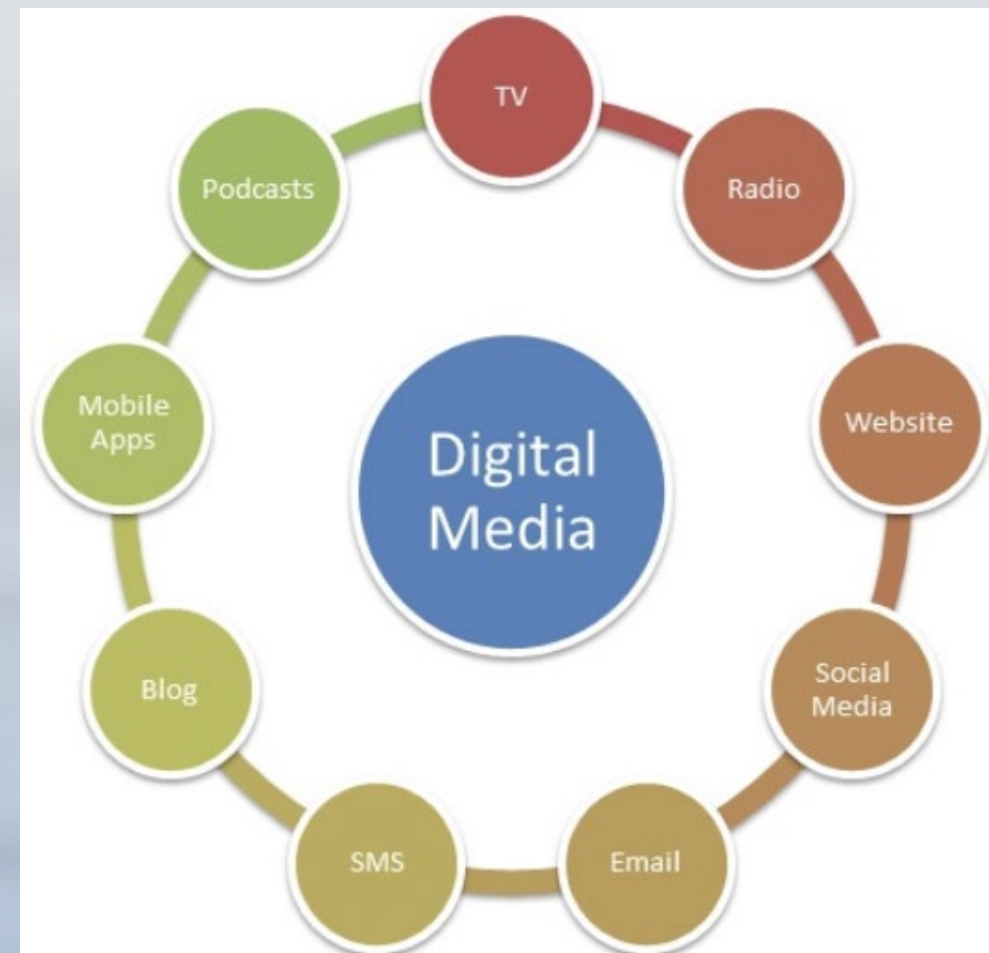
- Evolution of digital planning
- Navigating the video landscape
- Social media landscape



State of the Media



More Touchpoints
More Fragmentation



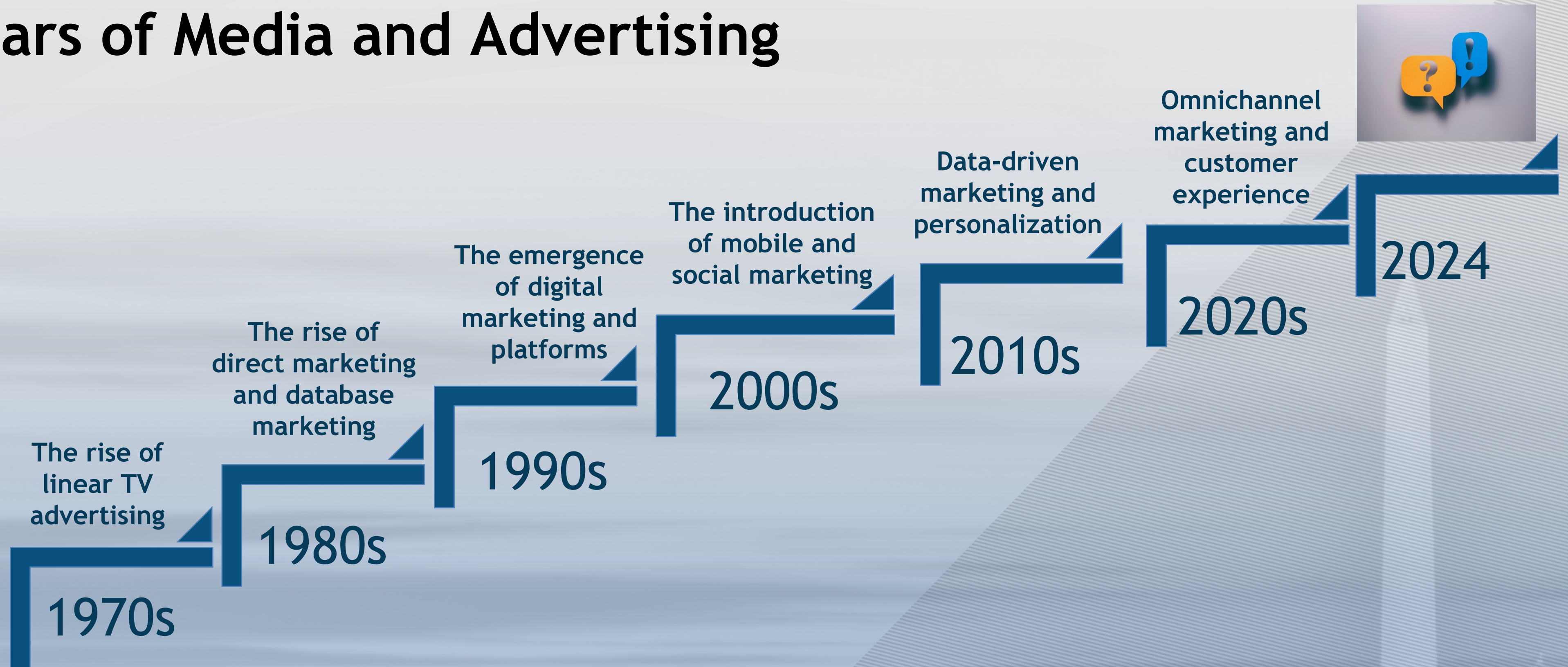
Digital Is All Channels



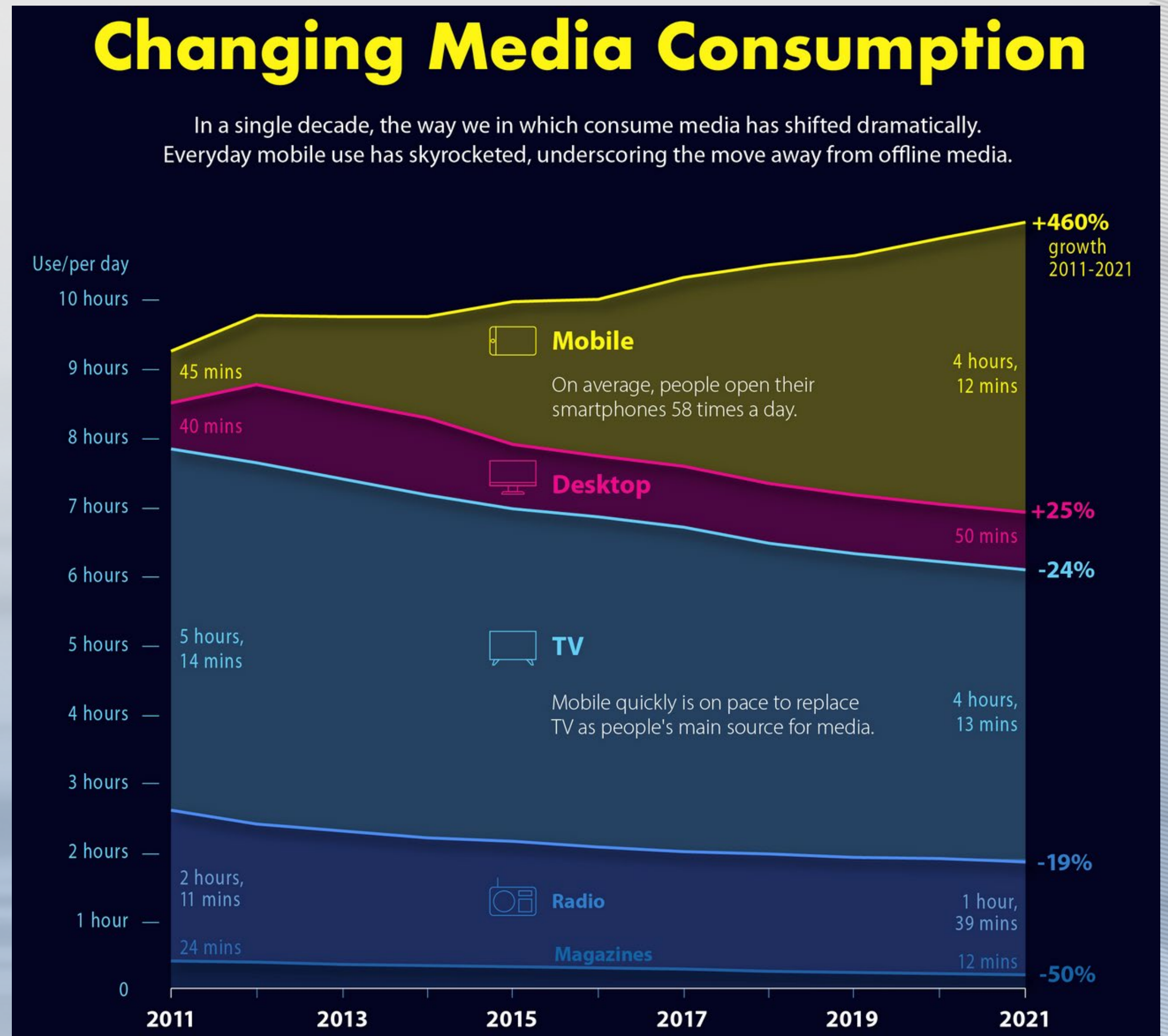
TV is Shifting But
Still Important



A Look Back On The Past 50 Years of Media and Advertising

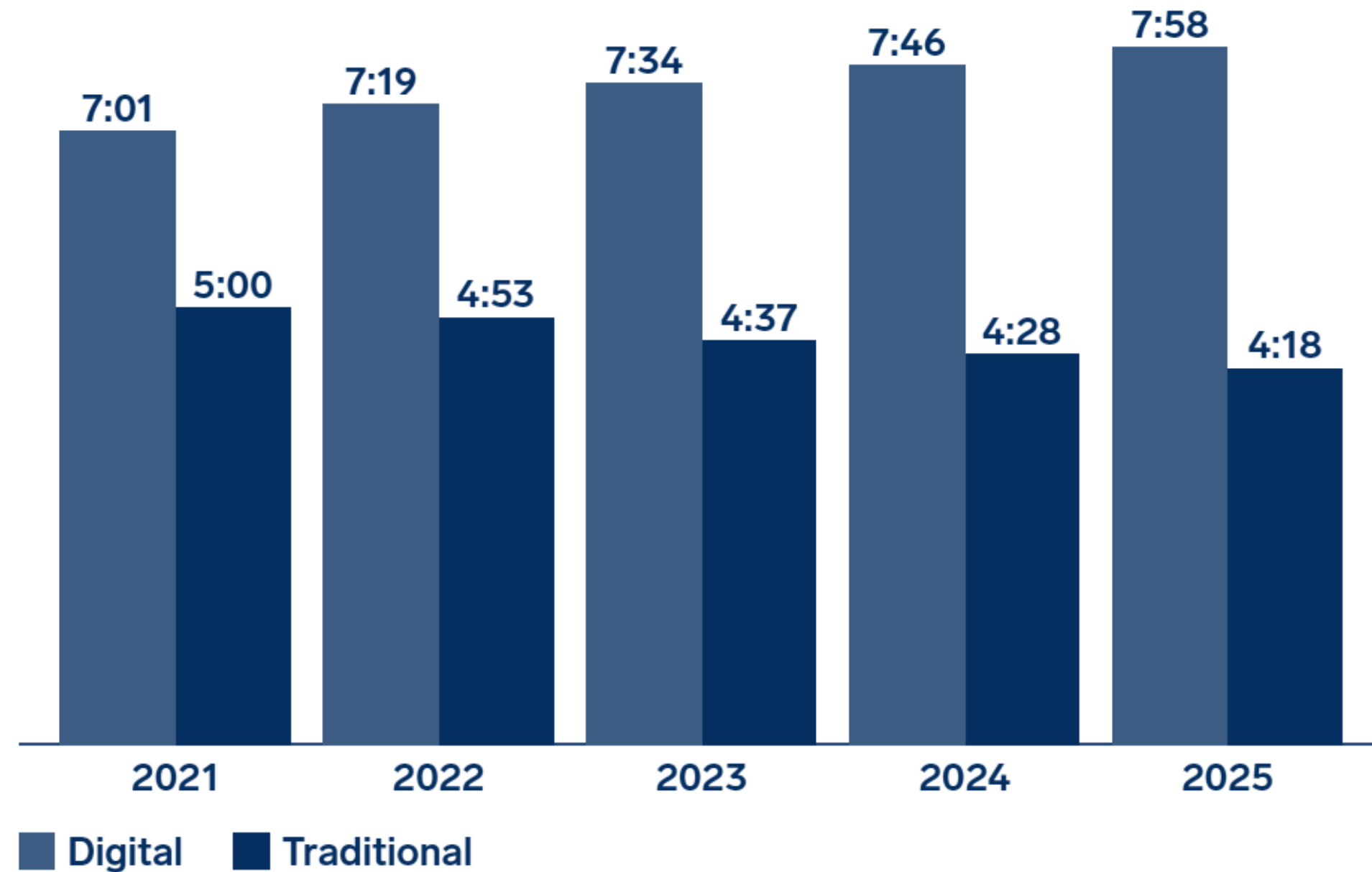


- Largest growth continues to be increasing with smartphones for consumption of all media.
- Desktop also continues to be showing an upward trend.
- The paradigm shift to CTV is underway, but traditional TV still claims more time per day than CTV.
- While linear TV has declined in the past 10 years it's still consumed at quality levels. Live sports and other appointment viewing is key to stay in front of.



Average Time Spent per Day With Digital vs. Traditional Media by US Adults, 2021-2025

hrs:min



Note: ages 18+; digital includes all time spent with internet activities on any device; traditional includes linear TV, radio, newspapers, magazines, printed catalogs, direct mail, cinema, and out-of-home

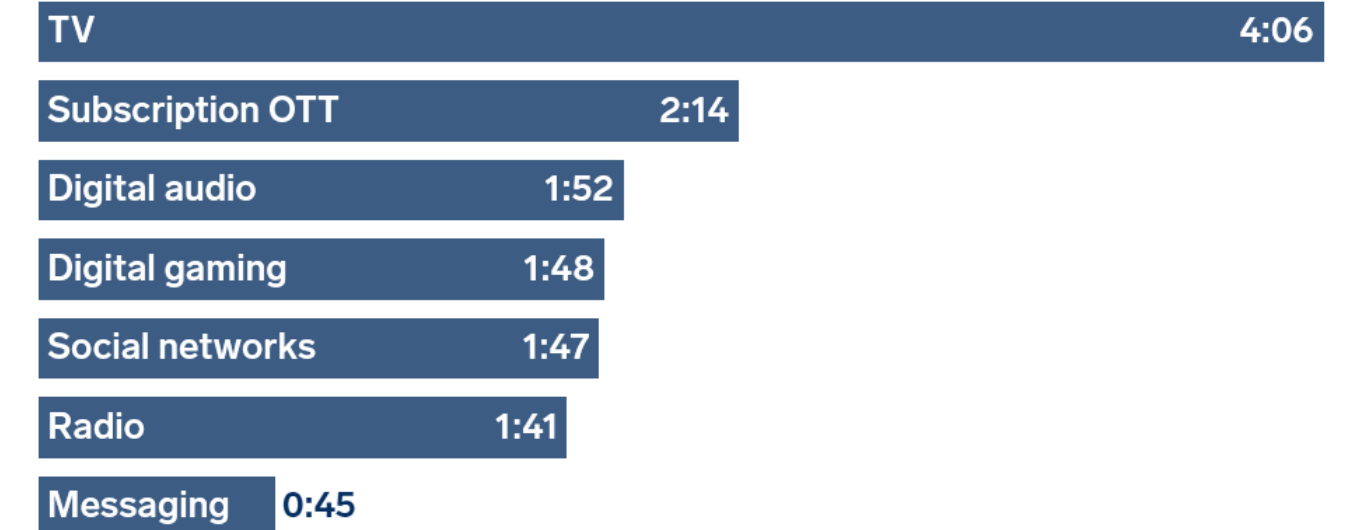
Source: eMarketer, June 2023

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Insider Intelligence | eMarketer

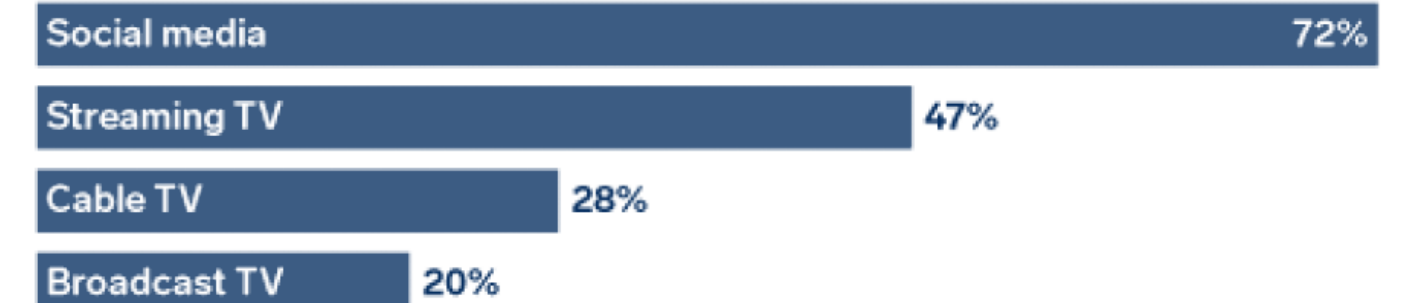
Average Time Spent per Day With Select Activities by Active Users, US, 2023

hrs:mins



Where Are Gen Z Adults Most Receptive to Ads?

% of respondents, Feb 2023



Note: ages 18-26; select responses shown

Source: NCSolutions, "Gen Z: How CPG Brands Can Build Brand Loyalty with the First Generation of Digital Native," May 4, 2023

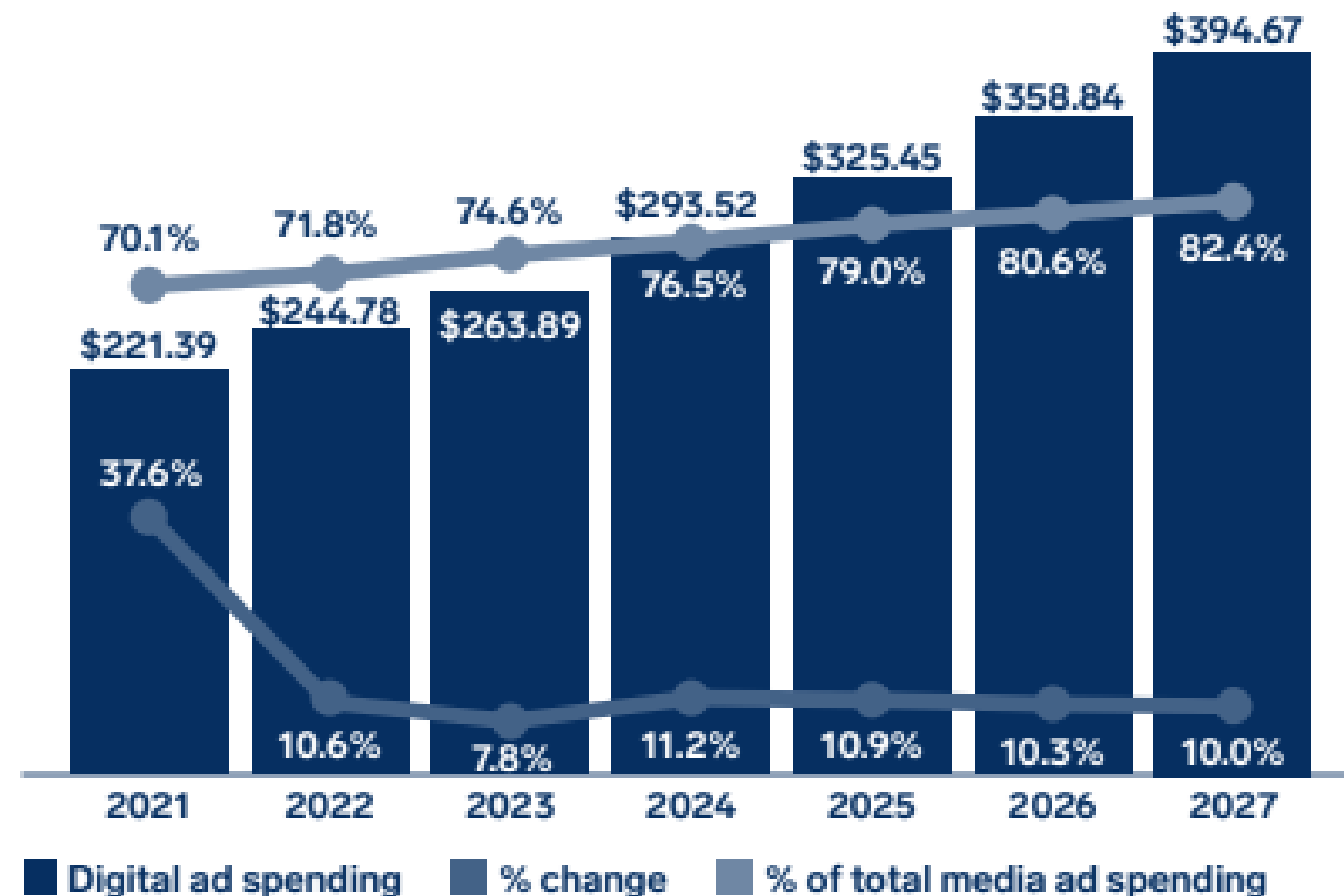
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eMarketer | InsiderIntelligence.com

Advertising Spend Reflects Media Consumption Trends

US Digital Ad Spending

billions, % change, and % of total media ad spending, 2021-2027



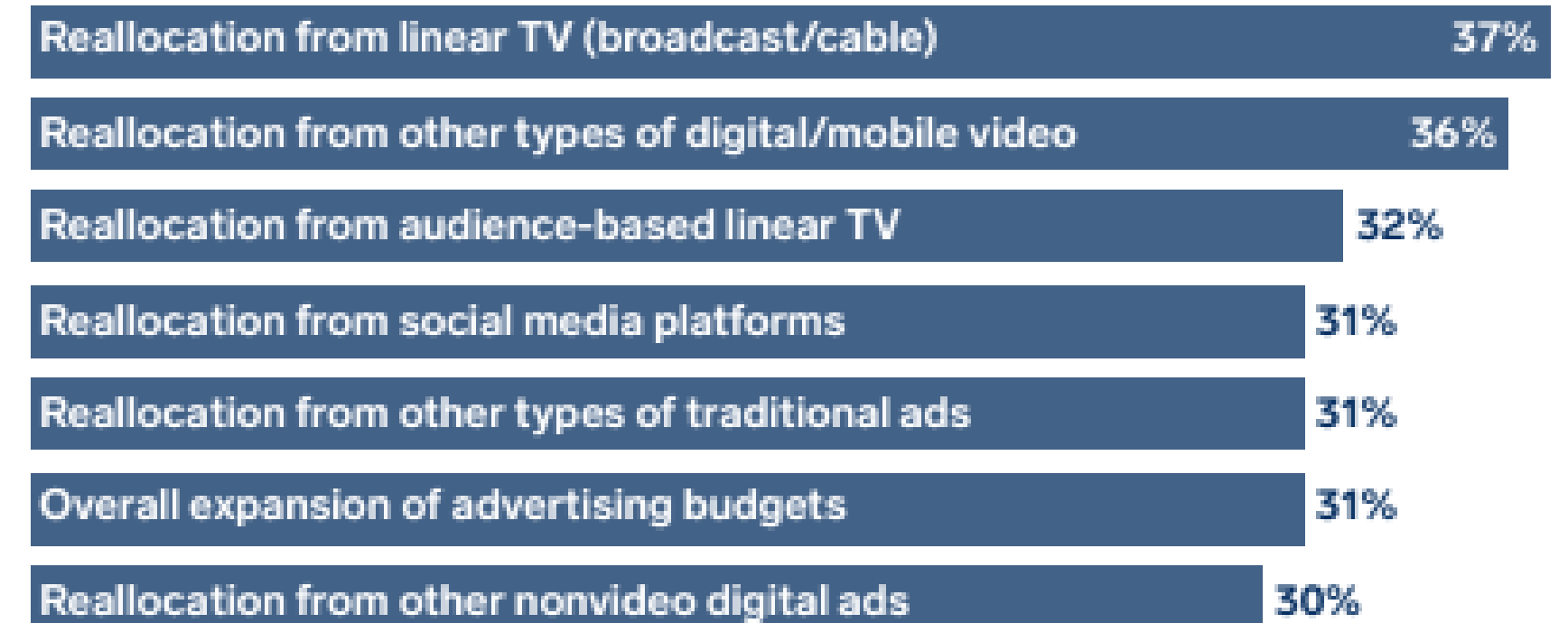
Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms

Source: eMarketer, March 2023

281209

eMarketer | InsiderIntelligence.com

Sources for Funding the Increase in Connected TV (CTV) Ad Spending According to US Agency/Marketing Professionals % of respondents, March 2023



Note: n=144 who are increasing CTV/OTT spending in 2023

Source: Interactive Advertising Bureau (IAB), "2022 Video Ad Spend & 2023 Outlook" in conjunction with Standard Media Index (SMI) and Advertiser Perceptions, May 3, 2023

281714

eMarketer | InsiderIntelligence.com

How Do We Plan Media With an EVERCHANGING LANDSCAPE?

- Fourth level
- Fifth level



Media Planning/Buying Process Flow

Media Work Plan



Lays out the audience research and media landscape considerations that informs NHTSA's national strategy. Focus on audience consumption, trends and channel-specific innovations.

Media Brief



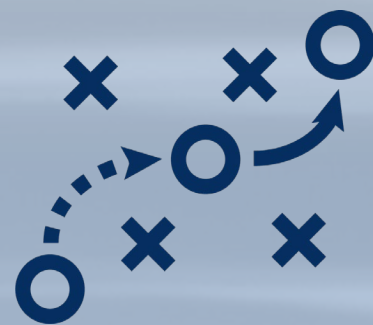
Create a brief to make sure all parties know what the goals are, what the boundaries are, and what success looks like.

Develop Media Plan



Develop an integrated media plan that reflects the objectives of the brief, the understanding of the audience, and the creative and the channel touchpoints that will best bring your campaign to life. NHTSA's media buy summary will inform what is being planned at the national level.

Media Buy Activation



Agency to finalize negotiations, align on measurement goals, send insertion orders and launch.

Pacing and Real-time Optimizations



Don't set it and forget it. Check-in on a regular basis to understand how campaign is performing based on the KPIs set forth and adjust.

Reporting & Insights



Regularly track what is happening with the campaign. Prepare a final report with Insights for learning and recommendations for future campaigns.



State of MULTICULTURAL



Our Multicultural Audience is Large ...

276%

Growth in Multiracial Population;
(9M in 2010; 33.8M in 2020)

23%
vs.
4%

Growth in Hispanic vs.
Non-Hispanic Population

41.1M

Size of Black/African-
American Population

40%
vs.
5%

Multicultural % of Population vs.
Multicultural % of Ad Spend

48%

% of Gen Z Who Don't Identify
as Non-Hispanic White

62.1M

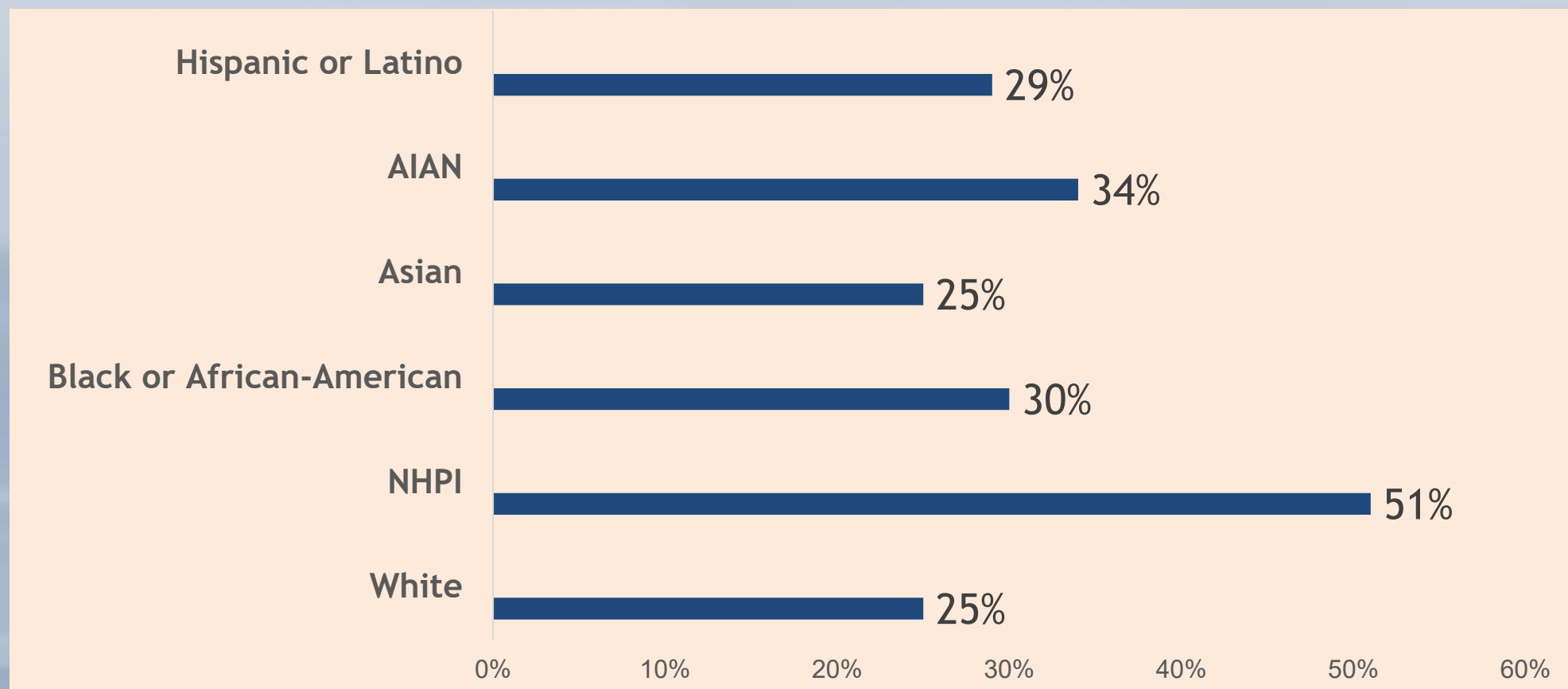
Size of Hispanic/
Latino Population



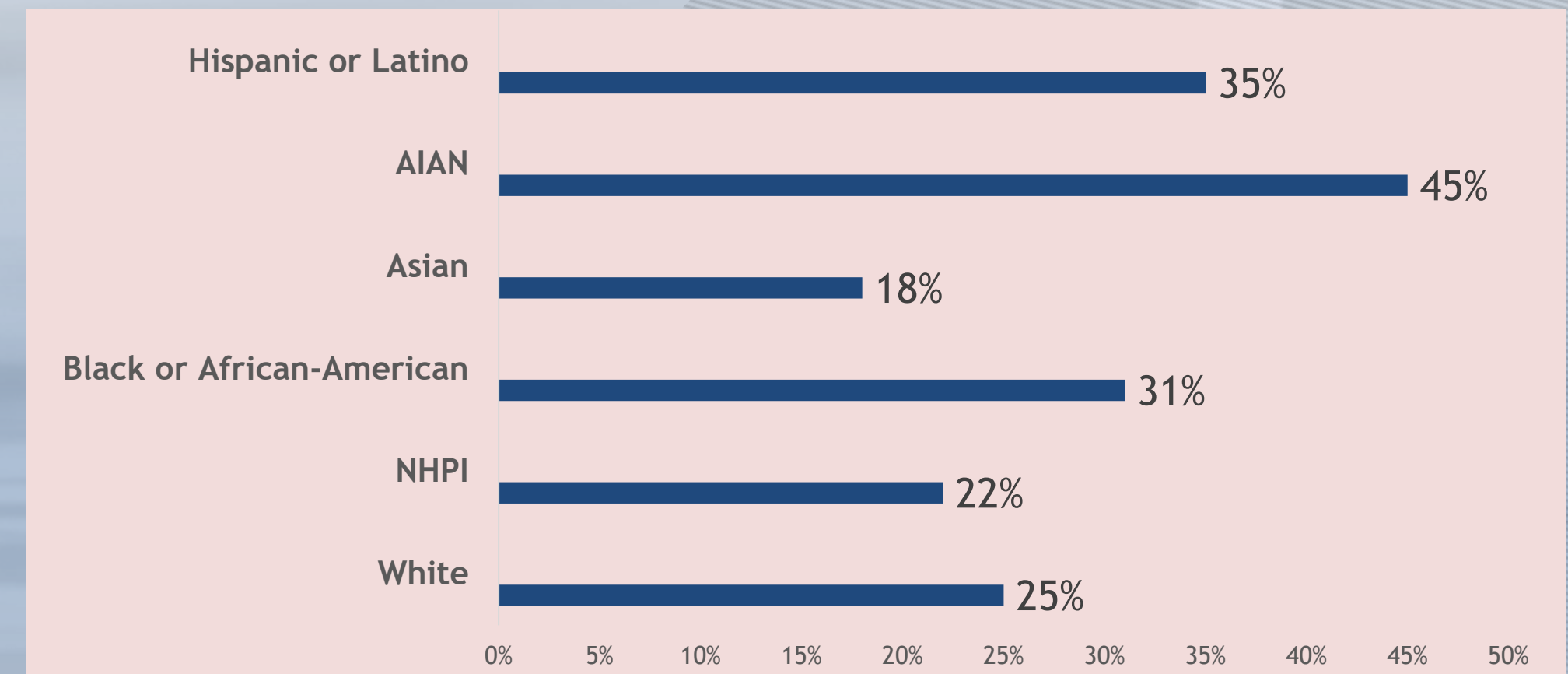
... And Key for NHTSA



**National Traffic Fatality Rate per 100K population
(National Average 11.28)**



**Speeding Driver Fatalities
(Overall = 26%)**



**Alcohol-Impaired Fatalities
(Overall = 28%)**

They Spend Time With the Same Channels ...

Roughly 2 in 3 multicultural adults are
spending more time on the internet v.s a year ago

7 in 10 play video games monthly

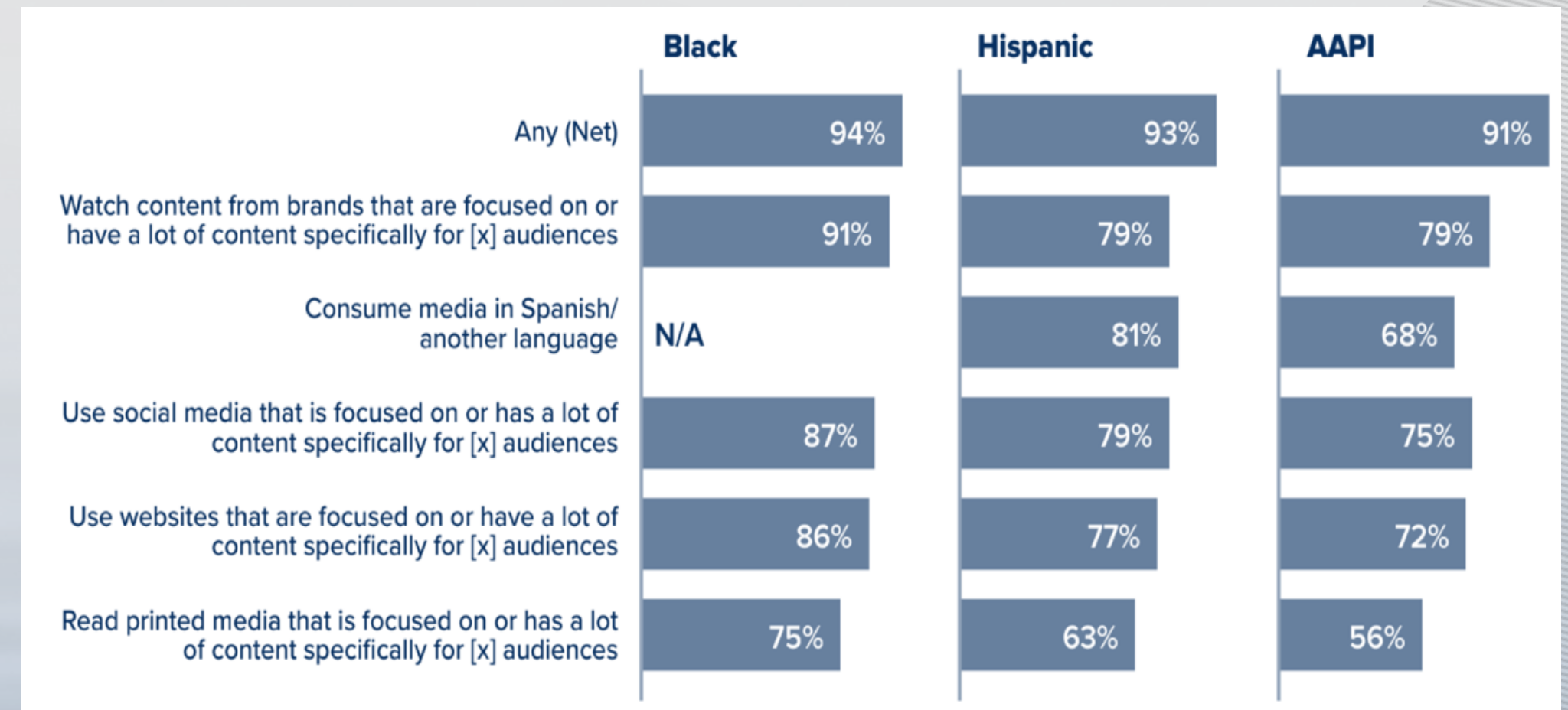
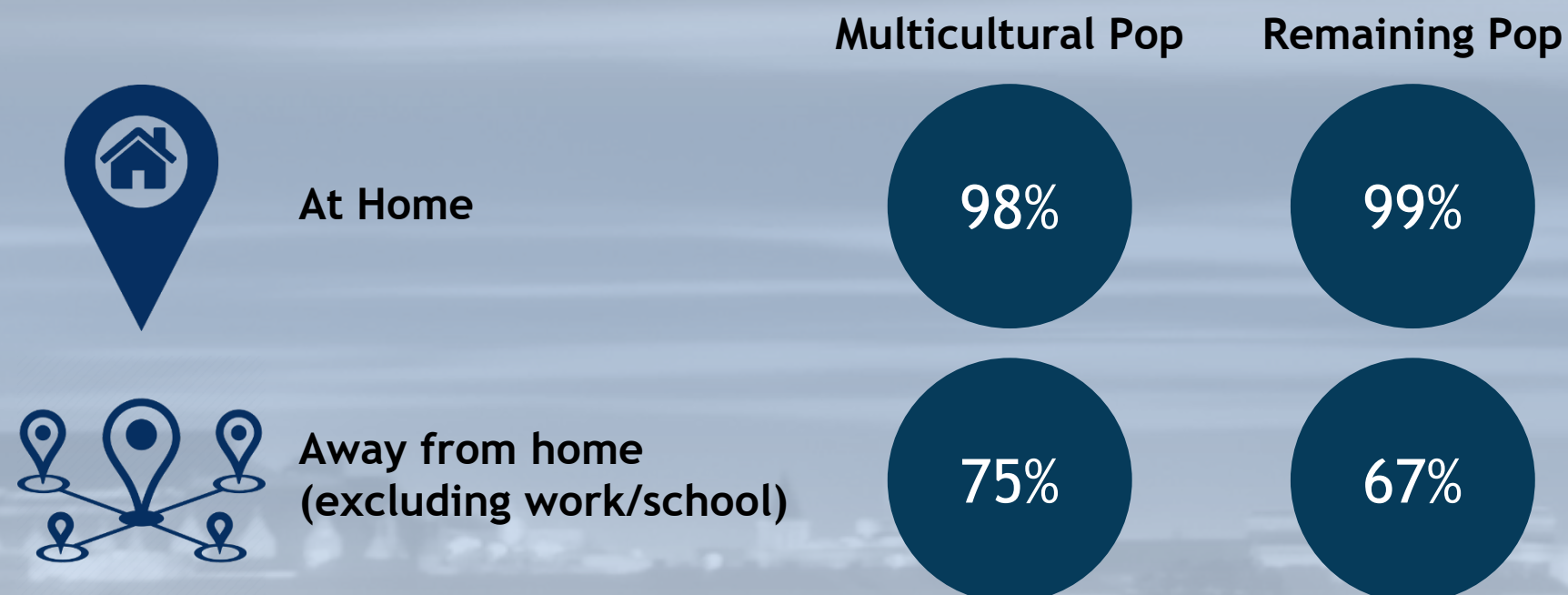
7 In 10 use internet for entertainment

7 in 10 watch online videos daily

6 in 10 listen to podcasts monthly

Black & Hispanic audiences spend
more time/week listening to podcasts

Daily Internet Use by Location



GAMING IS MORE PREVALENT, AND RANGE OF DEVICE USAGE SUGGESTS IN-GAME REACH POTENTIAL

IDENTIFY AS "GAMERS" (% TOTAL, BY SEGMENT)

% Multicultural U.S. Adults (Net)

50%

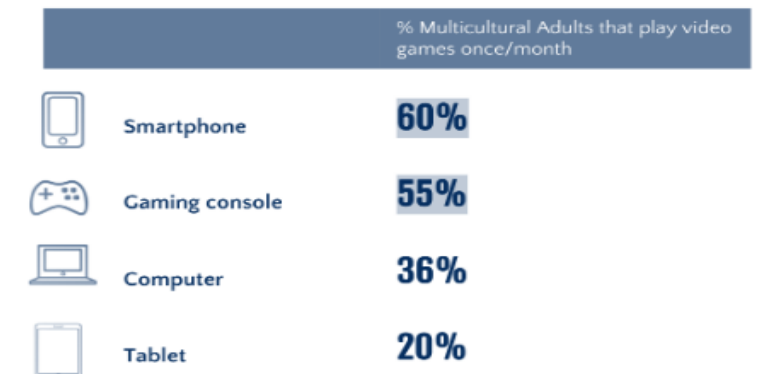
70% of multicultural adults play video games monthly

% Rest of U.S. Adult Pop.

43%

66% of non-multicultural adults play video games monthly

Devices Typically Used to Play Video Games

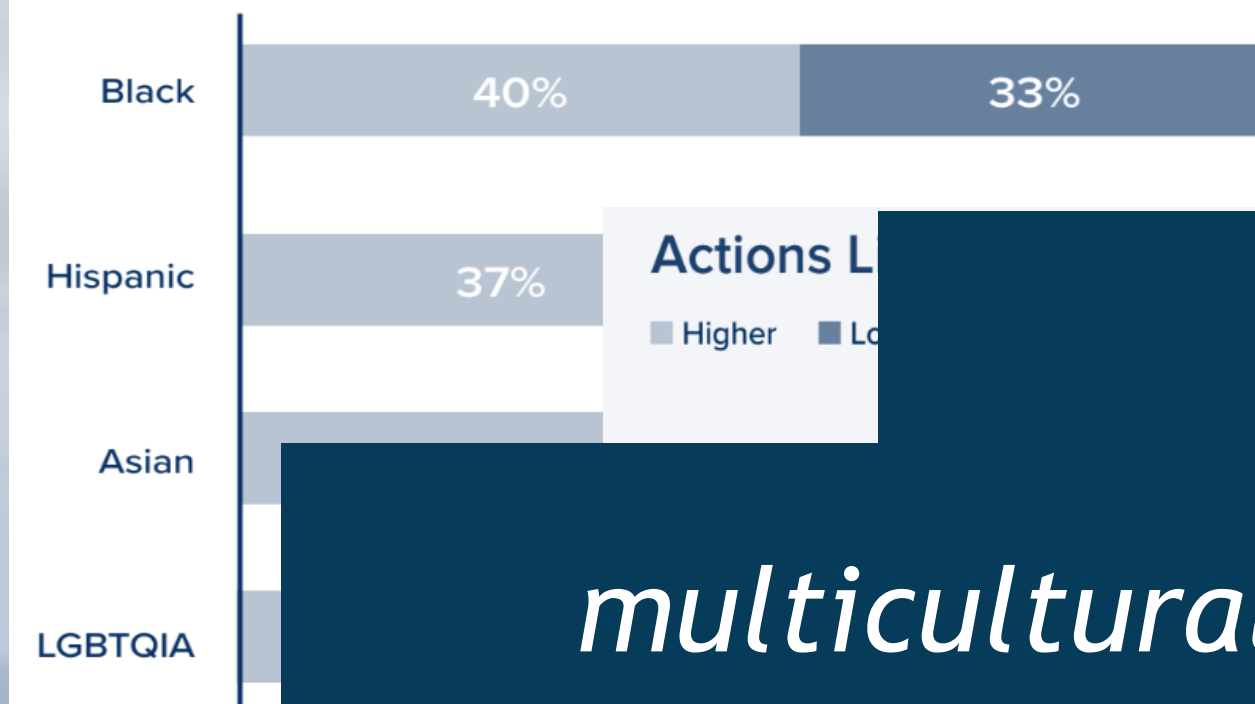


"Gaming" is not limited to large screen formats

... And Recognize Who is Speaking to Them on Those Channels

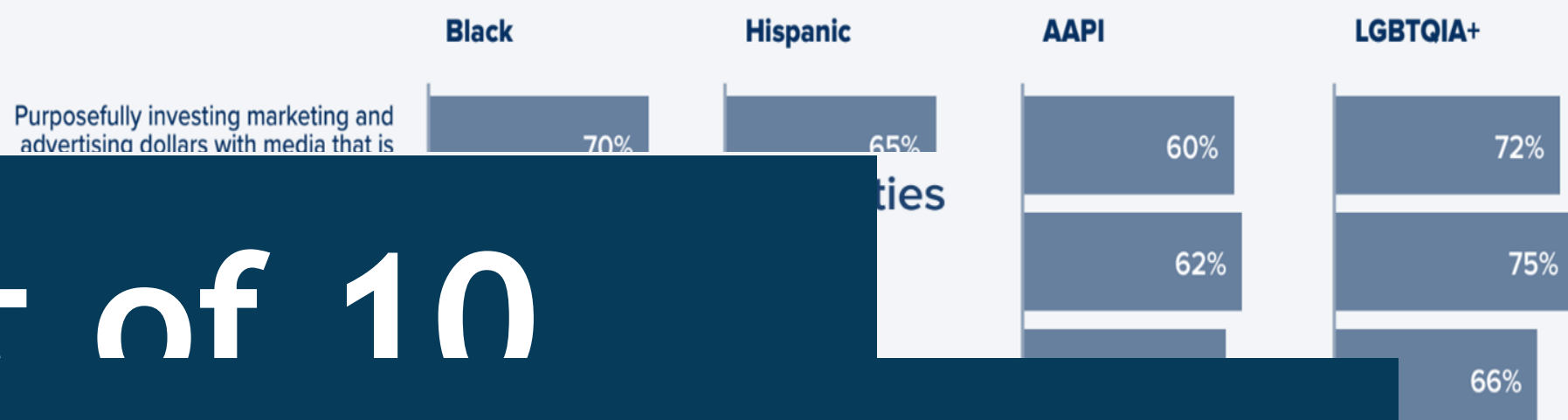
Whether Diverse Consumers Noticed Ads More on Diverse Led/Focused Media

■ A lot/little more on focused media ■ Equally on both focused and mainstream media



Perception of How Much Specific Marketing Initiatives Demonstrate Support for Diverse Communities

% 4 or 5 on a 5-point scale with 1 = Does not demonstrate support at all and 5 = Strongly demonstrates support



7 out of 10

multicultural adults say they trust companies more when they feel understood

competitor brand that does not support the [x] community
I am not likely to take any action because of a brand's support

41%

7%

37%

9%

37%

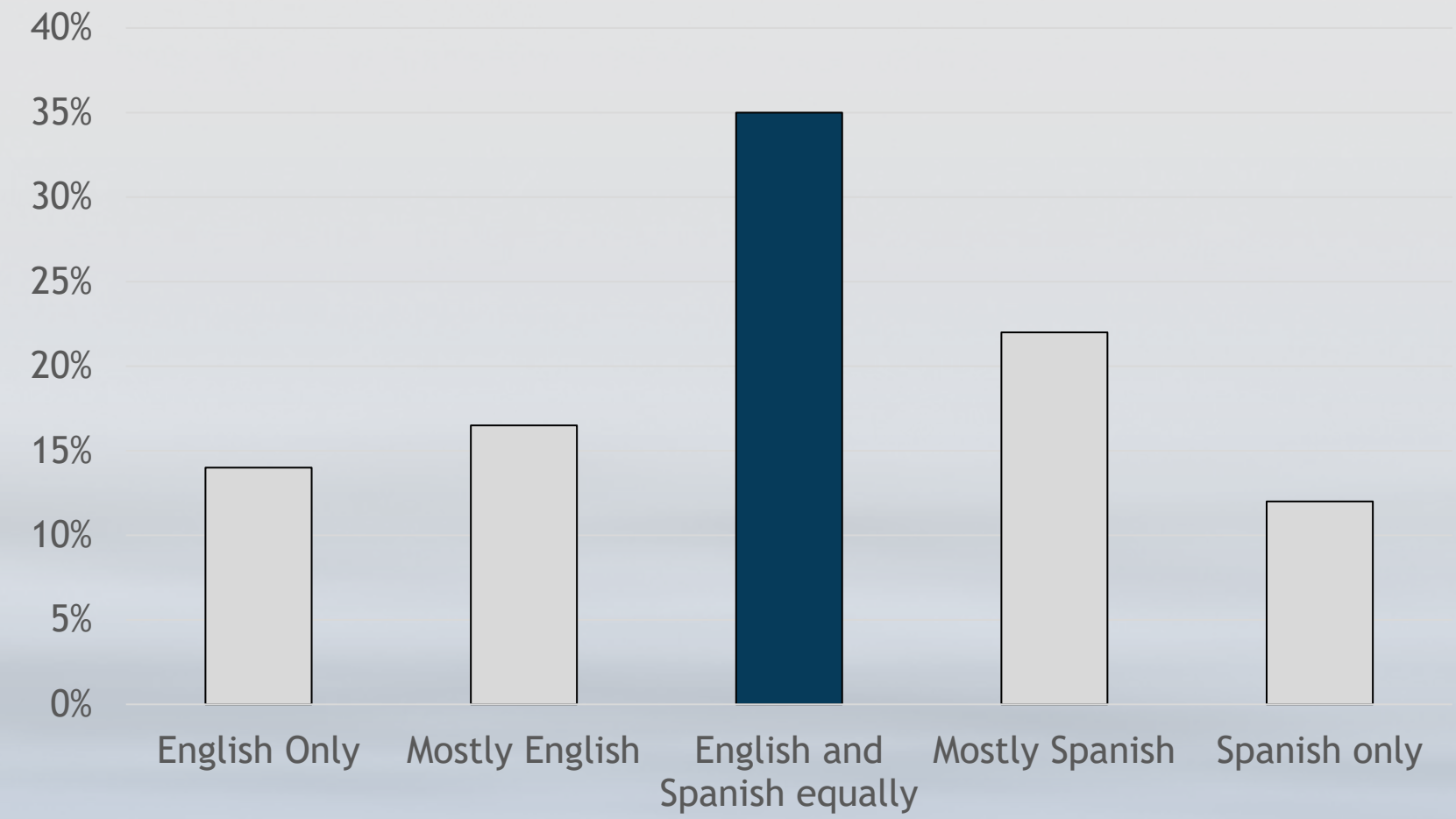
14%

48%

11%



¿Hablas Español? Language Is Culture

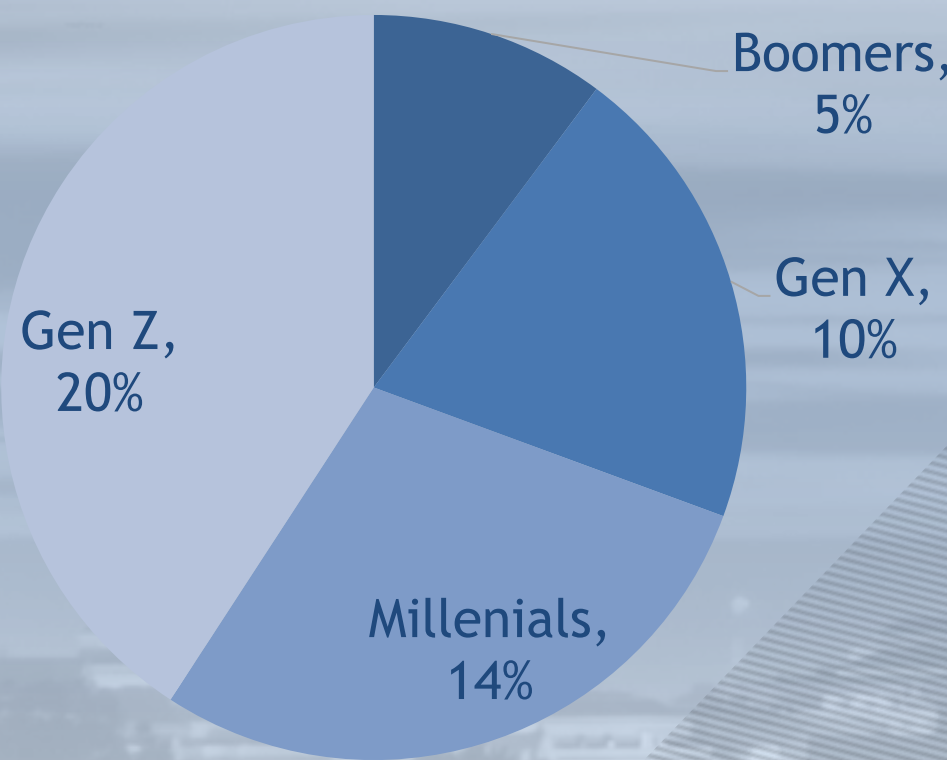


Hispanic Adults 18-64 Languages Spoken at Home

	Digital	TV	Radio
Spanish and English equally	36%	42%	41%
English Only	27%	20%	23%
English Mostly	24%	23%	19%
Spanish Mostly	8%	10%	12%
Spanish Only	5%	5%	5%

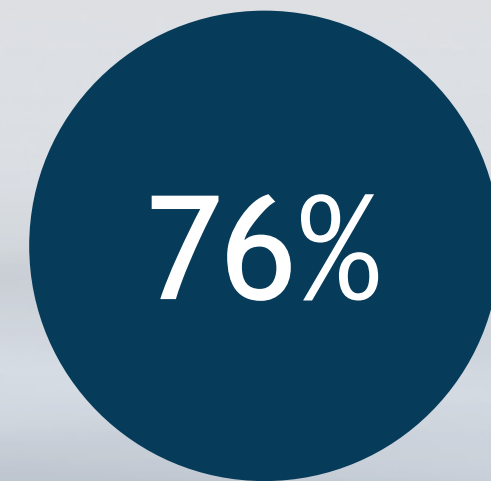
Language Used When Consuming Media Content by U.S. Hispanic Adults

Share of Hispanic/Latinos who said they were most comfortable speaking “Spanglish”

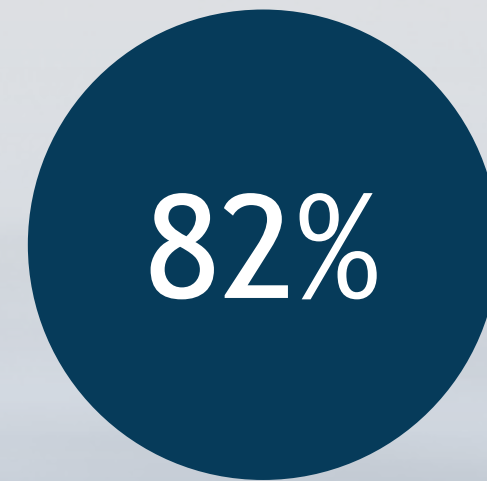


¿Hablas Español? Language Is Culture

“Companies should reach out to consumers in both English and Spanish”
(% agreeing)



Spanish
Dominant



Bilingual



English
Dominant

86% of Hispanics

say language helps them remain
connected to their culture

Understanding and Reaching Our Multicultural Audience

1. Not a monolith
2. Think about the subsegments within our multicultural groups

African American Males 18-24

Working

Parent

Loves
to Travel
by Car

Below
Median
HHI

Loves
the Gym

In School

Single

Public
Transit

Median
HHI

Loves
to Run



Evolving DEMOGRAPHICS



Understanding and Reaching Our ~~Multicultural~~ Audience

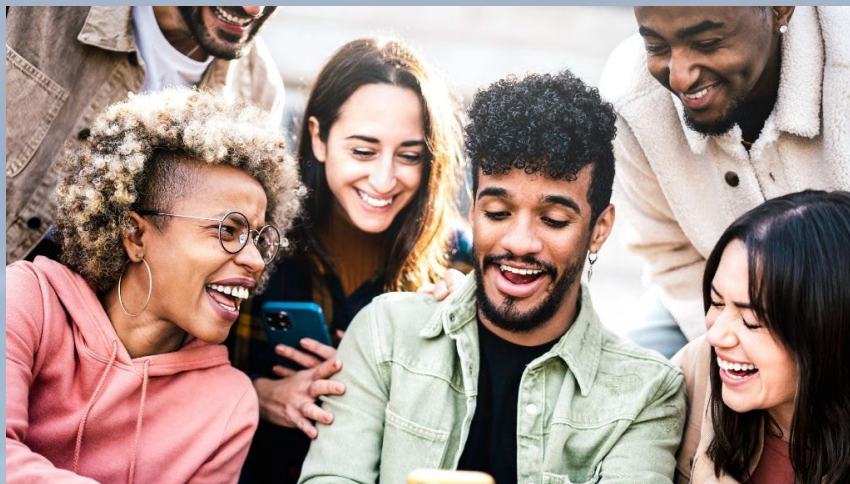
1. Not a monolith
2. Think about the subsegments within our targeted groups
3. Who has more in common:
 - Two Gen Z selected at random?
 - Two Coachella attendees selected at random?



Gen Z
(68M people)



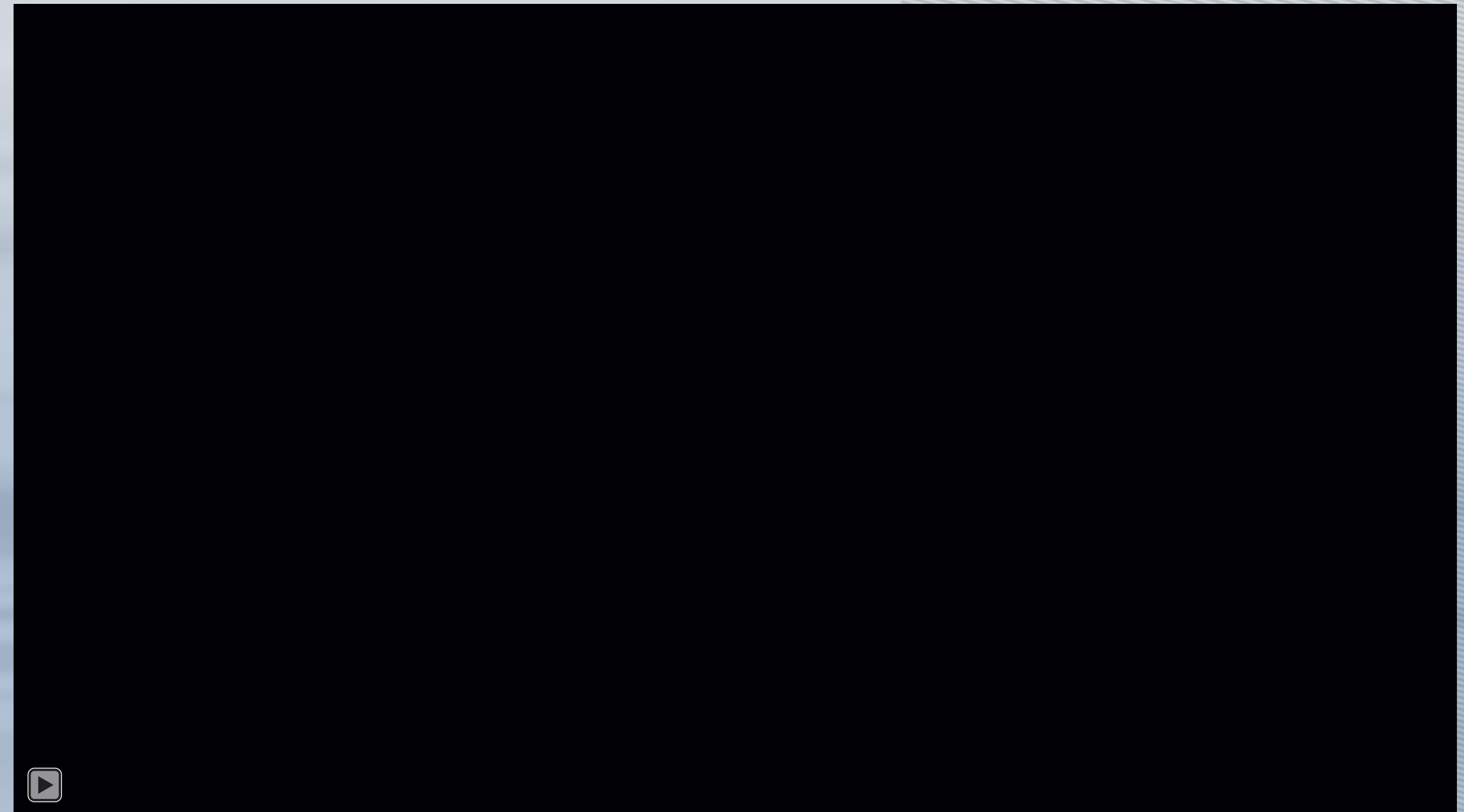
Beyhive
(Beyonce Fans)



Millennials
(72M people)



Formula 1
Fanatics



What influences us?

The people around us



What influences us?

The people around us

What media do we watch?

The media others around us are watching



What influences us?

The people around us

What media do we watch?

The media others around us are watching

How do we behave?

The way others around us are behaving



Driving Behavior Change: The Power of “Network”

From:
Target
Audiences



To:
Target
Networks



- 👉 They don't watch the show first.
- 👉 They don't vote in the primaries.
- 👉 They don't respond to marketing first.

"You have to find your congregation—your tribe—and preach the gospel to them. Not only will they move but they'll be inclined to convince others to move also."

~Dr. Marcus Collins



Takeaways

- Generational targeting is an approach but should not be the end all be all for marketing targeting campaigns.
- Understanding the networks of our audience can provide new touchpoints to consider.
- **Nobody is a monolith.** Look for opportunities to touch on passion points with relevant messaging in relevant spaces.



Channel Planning in a DIGITAL WORLD



Media Planning & Buying Can Appear Like This ...



TRADITIONAL VS. DIGITAL:

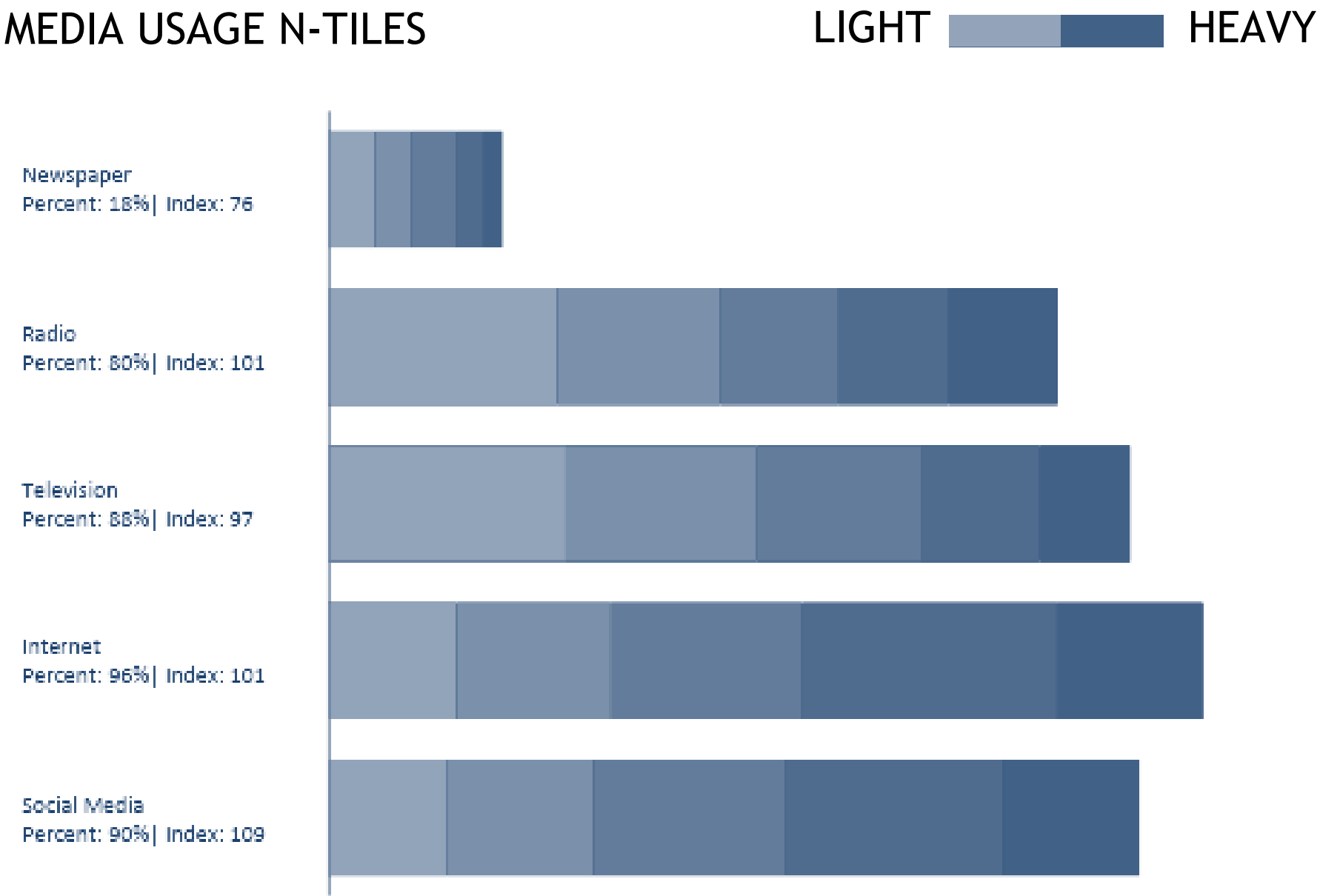


WHICH MEDIA SHOULD YOU CHOOSE?

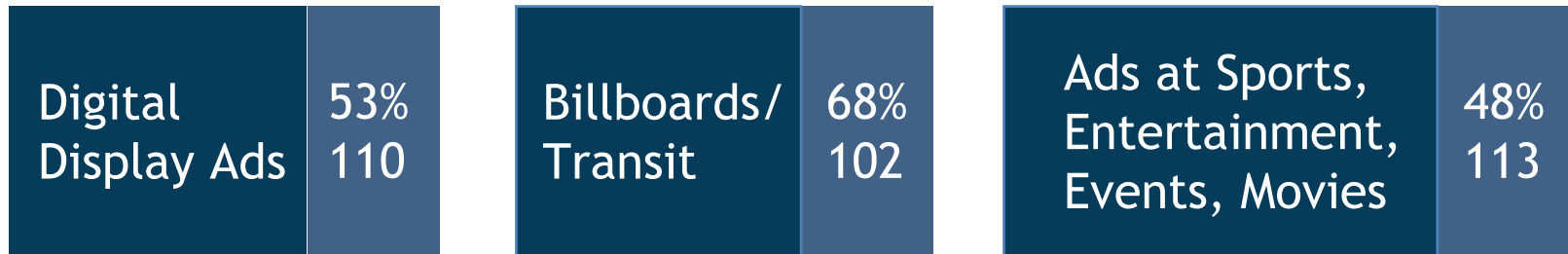




Millennials: Media Consumption



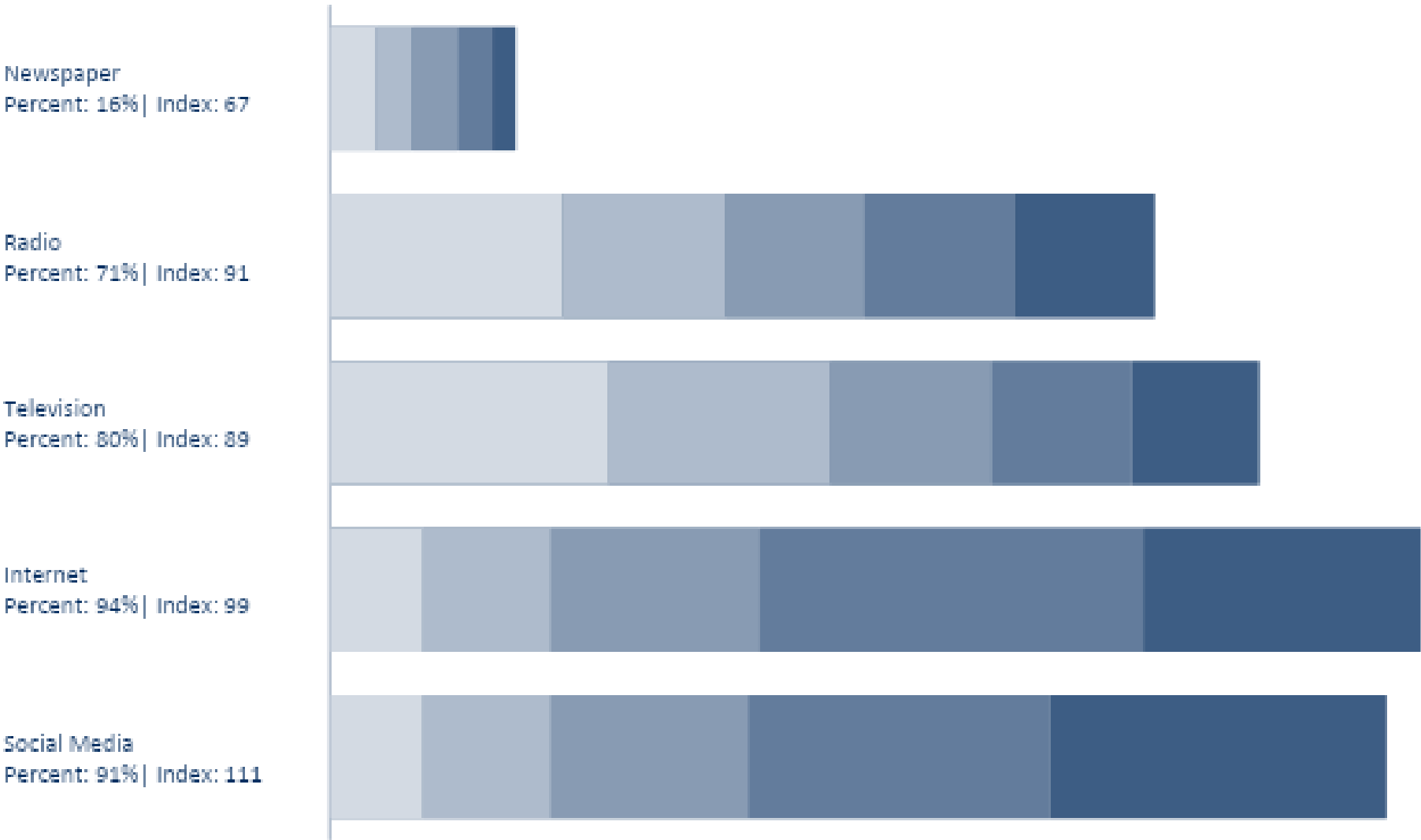
OUT-OF-HOME MEDIA (LAST 30 DAYS)



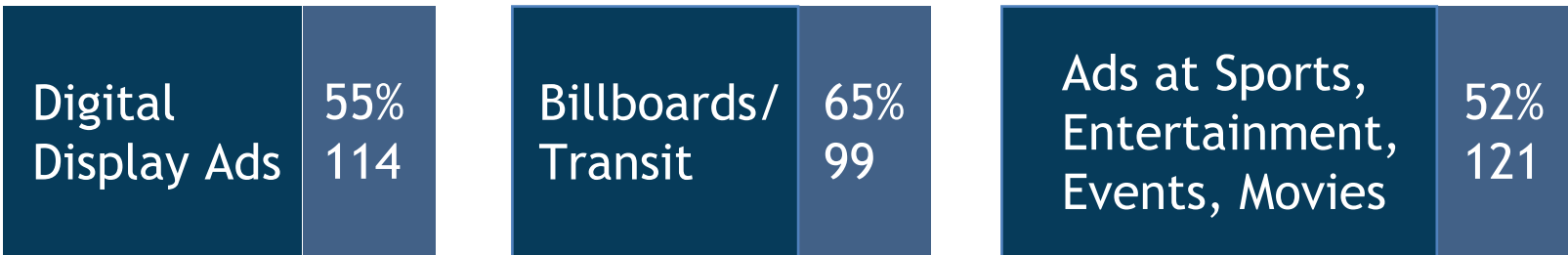


Gen Z: Media Consumption

MEDIA USAGE N-TILES LIGHT HEAVY



OUT-OF-HOME MEDIA (LAST 30 DAYS)



Blurred Channel Planning?

Traditional
Digital

Target
Audience

Media
Landscape

Media
Consumption

Device
Usage

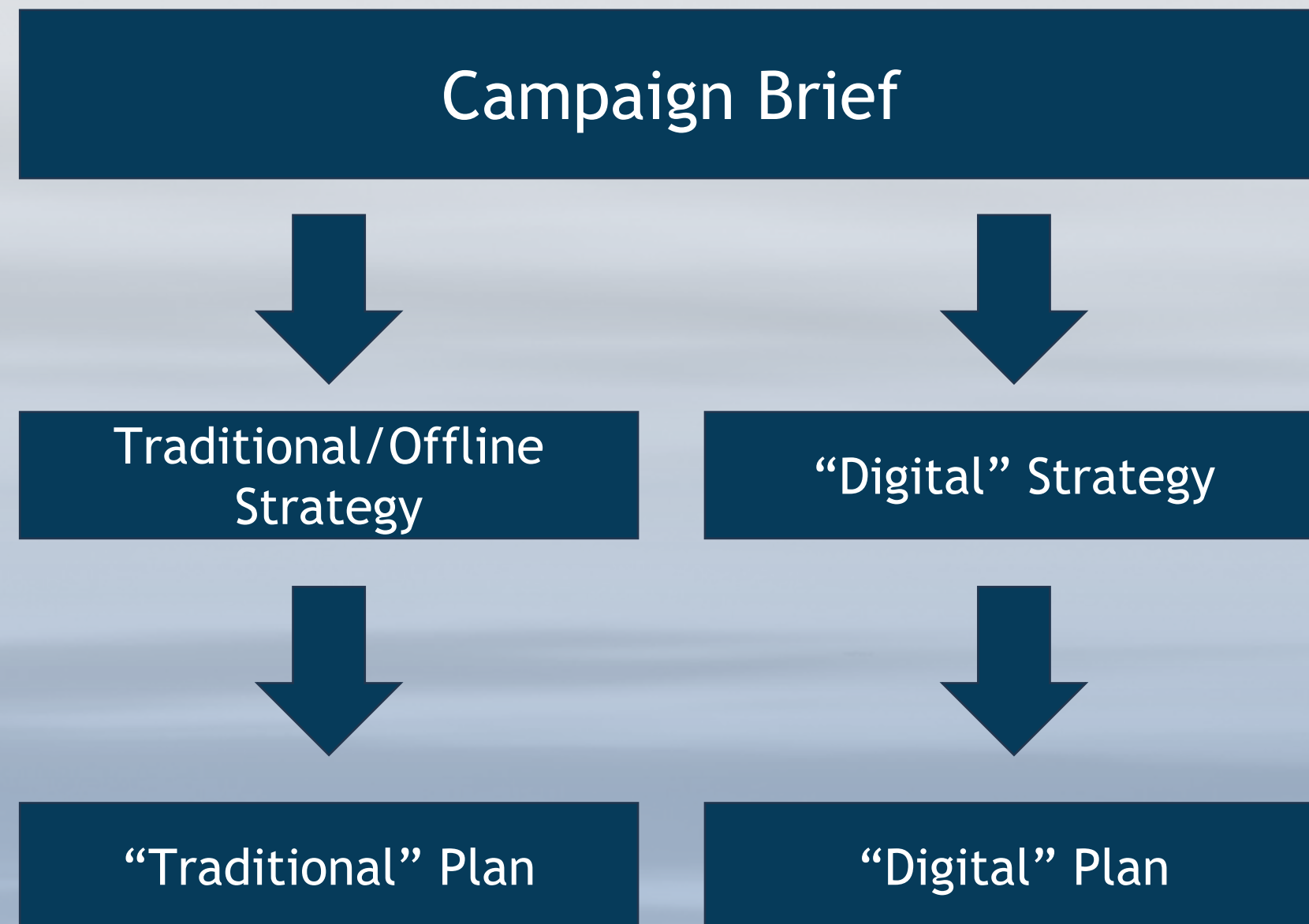


Where Do We Start to Unblur?

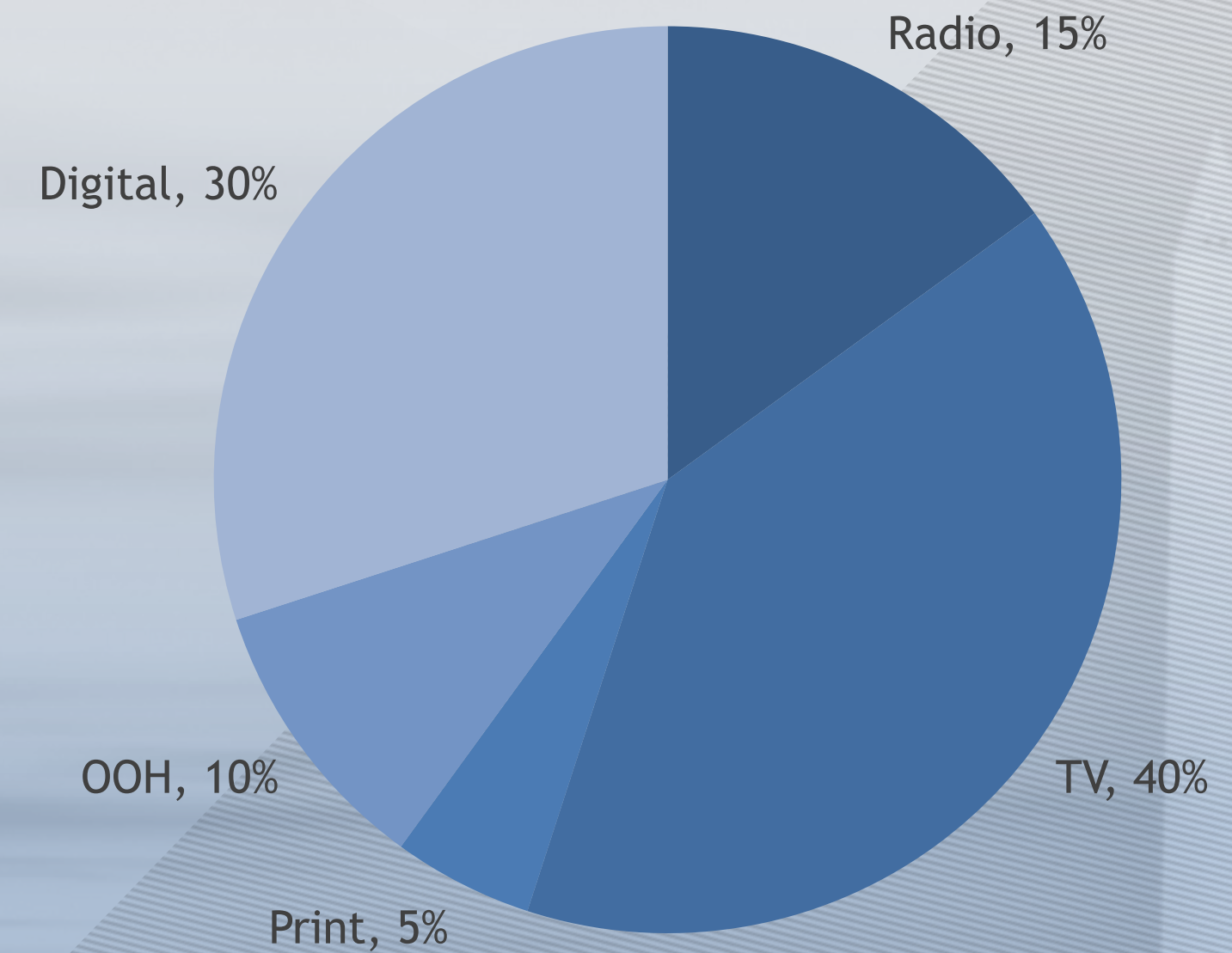


Traditional Media Planning Approach

Previous Strategy Approach

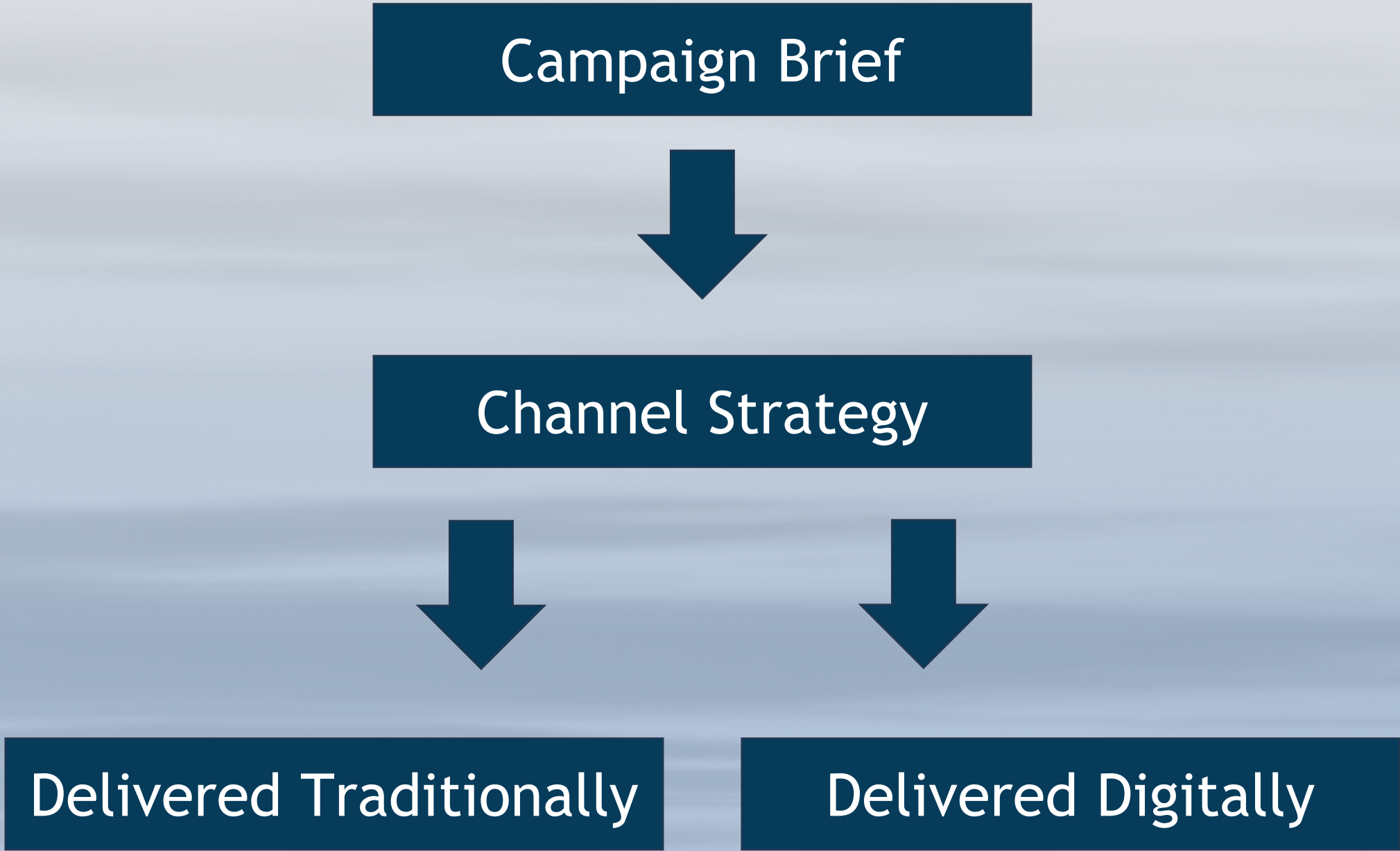


Previous Budget Allocation Approach



Media Planning Evolution

Evolved Approach



Evolved Allocation Approach

FORMER	EVOLUTION
TV	Video
Radio	Audio
Out-of-Home (OOH)	Out-of-Home/Digital OOH
Magazine/Newspaper	Print/Digital Print
Digital	Ads on Social Media
Digital	Ads on Webpages (display or video ads)



Media Planning Evolution Example

Campaign Brief



- Media Strategy
- Research Data Points
- Budget
- Campaign Timing
- Creative Assets
- Audience



Media Planning Evolution Example

Campaign Brief

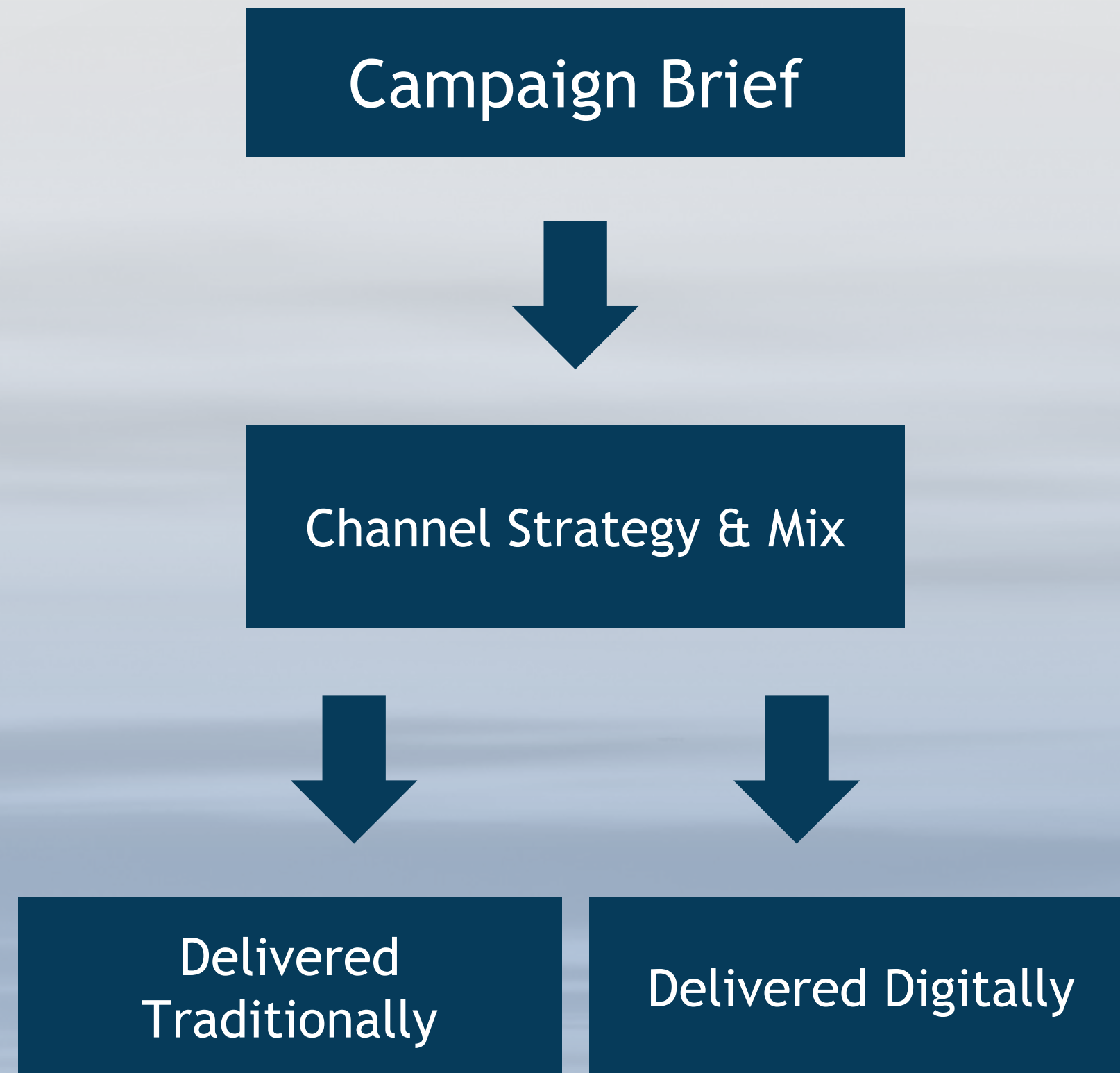


Channel Strategy & Mix

- Where are the campaign target audience(s) consuming their media?
- How much time are they spending with the media they are consuming?
- What can my budget afford?
- How can I complement/supplement the national buy or should I based on my footprint?
- Channel prioritization for my footprint?
- What's the next step?



Media Planning Evolution Example



- What is my channel prioritization and how much can my budget afford to put behind them?
- How should the budget break out based on channel prioritization and delivery?
- Does my plan have a balance of delivery tactics that "speak" or "engage" with the target?

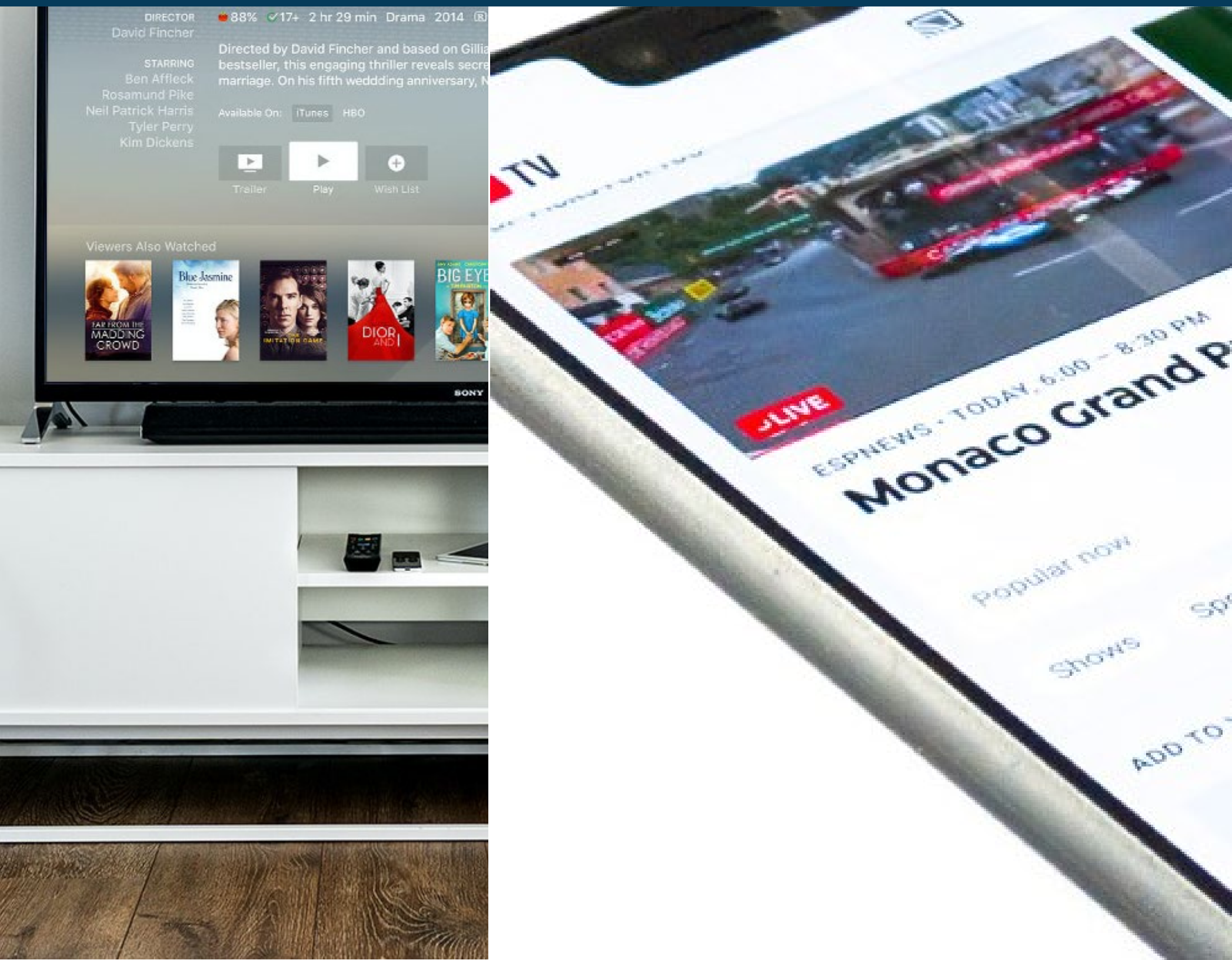


Same Content

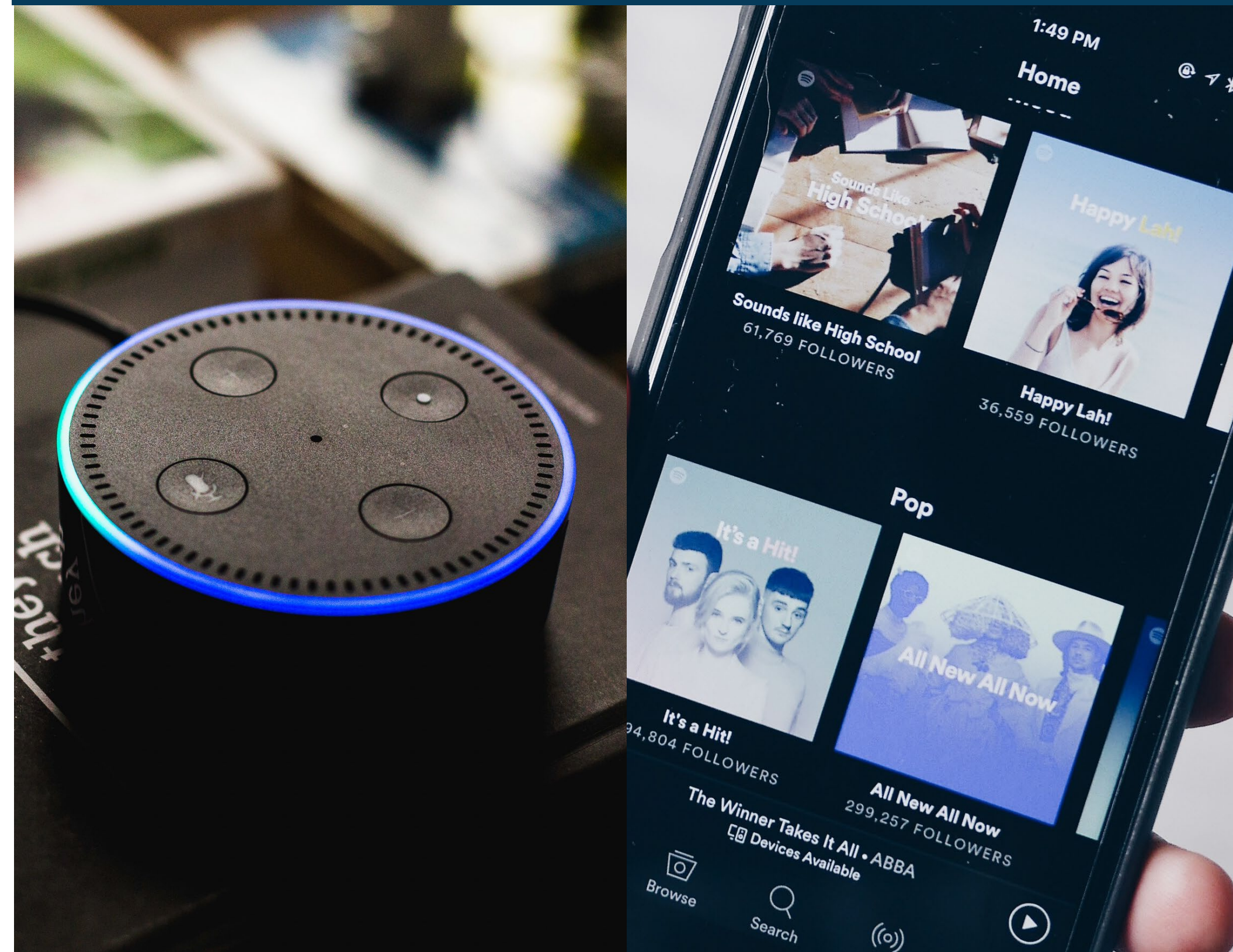


Delivery Evolution

TV planning becomes video planning and recognizing the different types of video content being streamed on all devices



Radio planning becomes audio planning and recognizing the different spaces and places consumers are listening

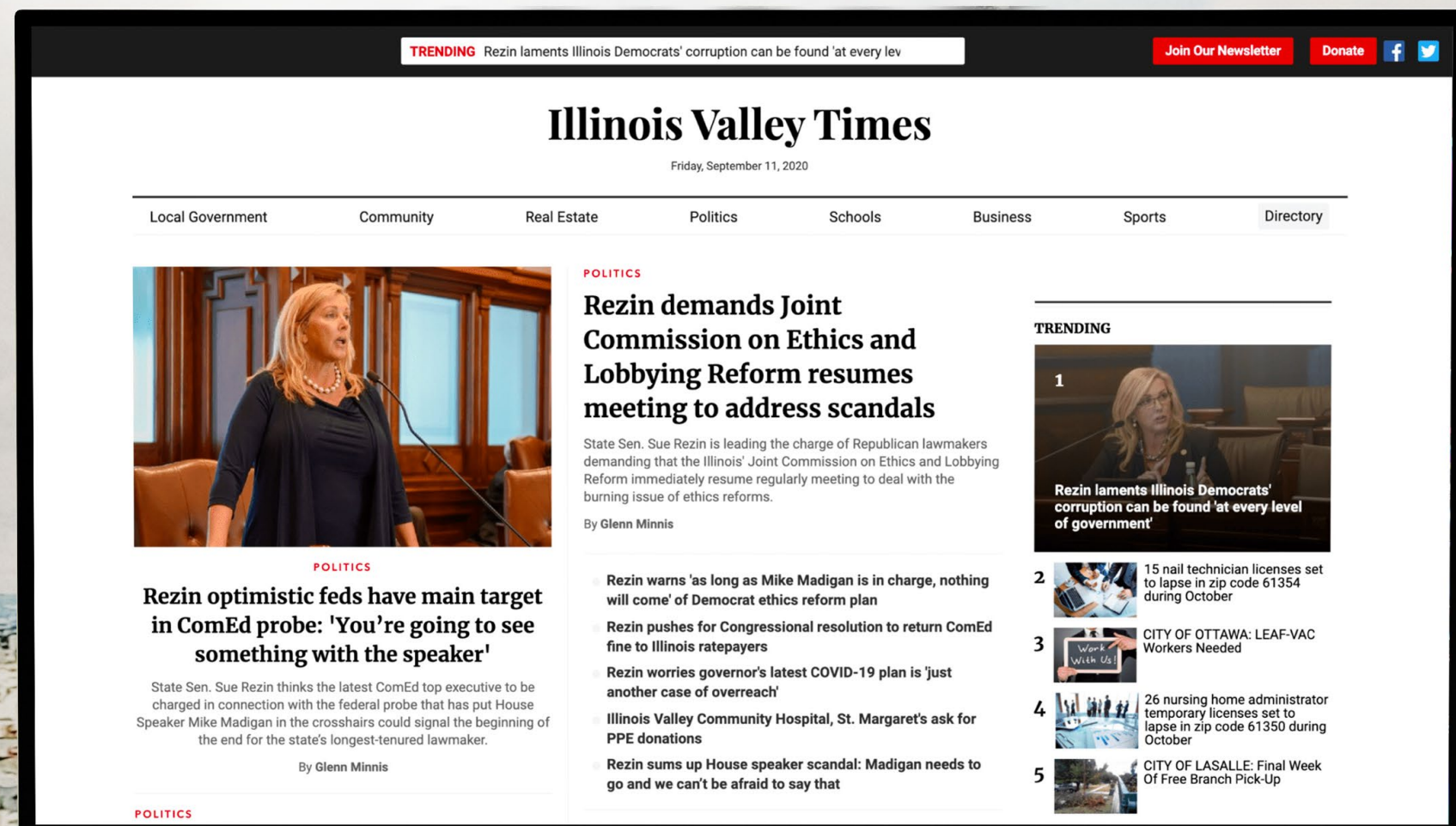


Same Content

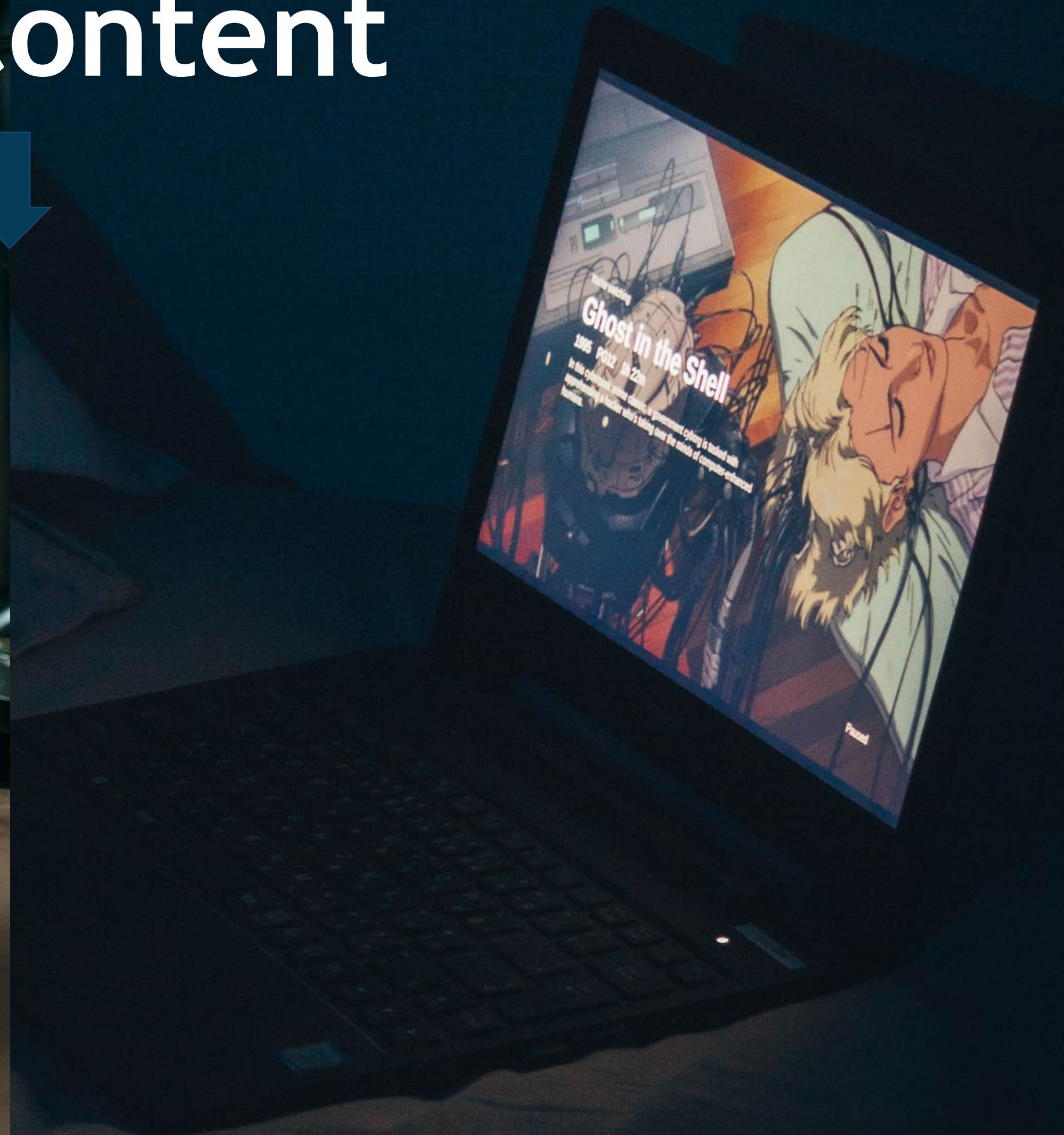


Delivery Evolution

Newspaper, magazine, and OOH planning also evolve to channel planning, delivered traditionally OR digitally to reach our news OR content enthusiast whether they are inside OR outside of the home



Same Content



Delivery Evolution

Gaming + Social



Media Planning & Buying Can Be a Clear Vision...



This Informs Our Understanding of the Video and Social Landscapes

Continued Evolution of Video



Social Media: Landscape and Uses



Connected TELEVISION



The Video Landscape Continues to Fragment

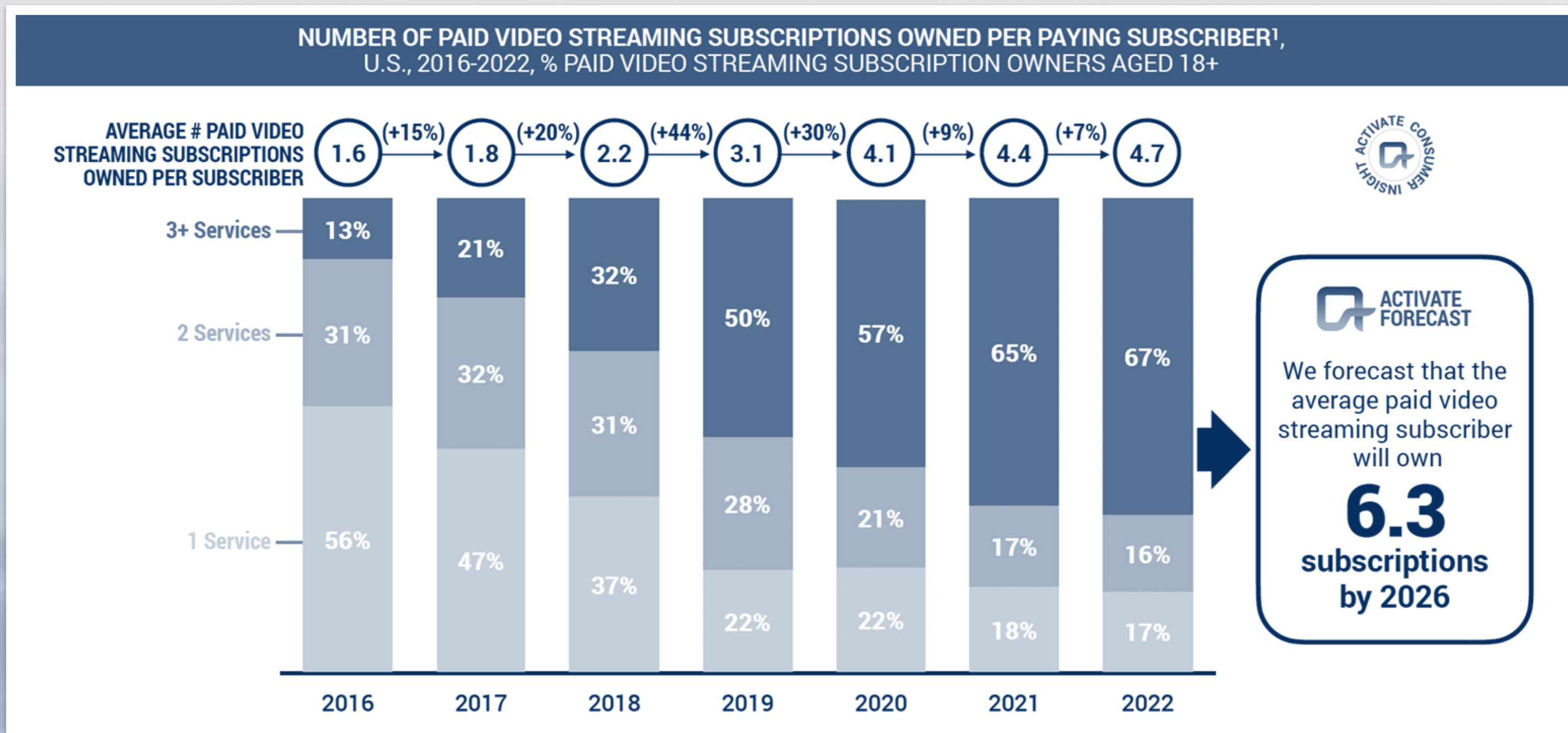
Q: When was the last time you used fewer than three internet-connected devices in a day?

- The last time you used less than two?
- The last time you used less than one? (a day without internet!)

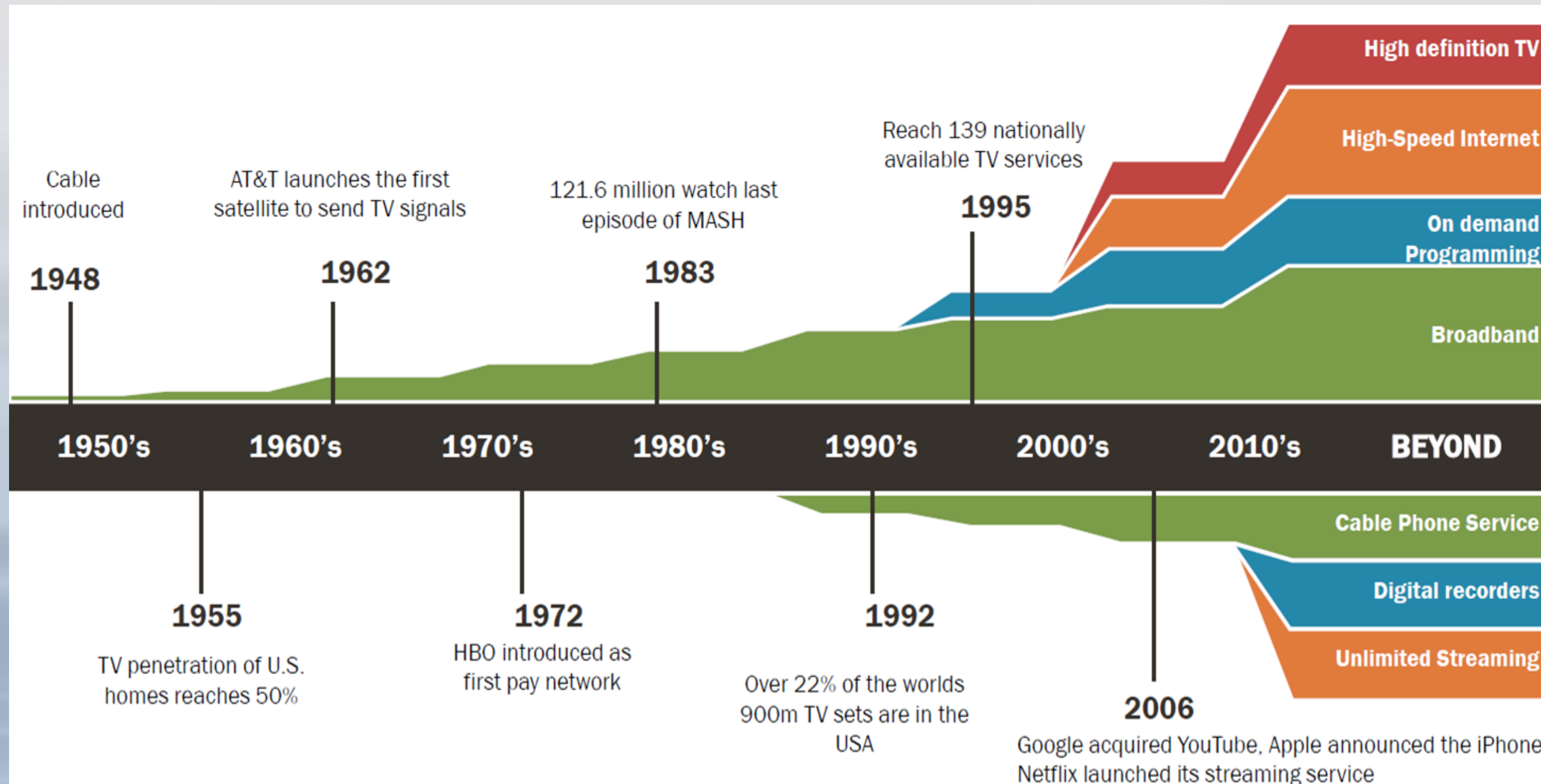
We're guessing it's been a long time (if ever).



Paid Streaming Video Subscription Evolution



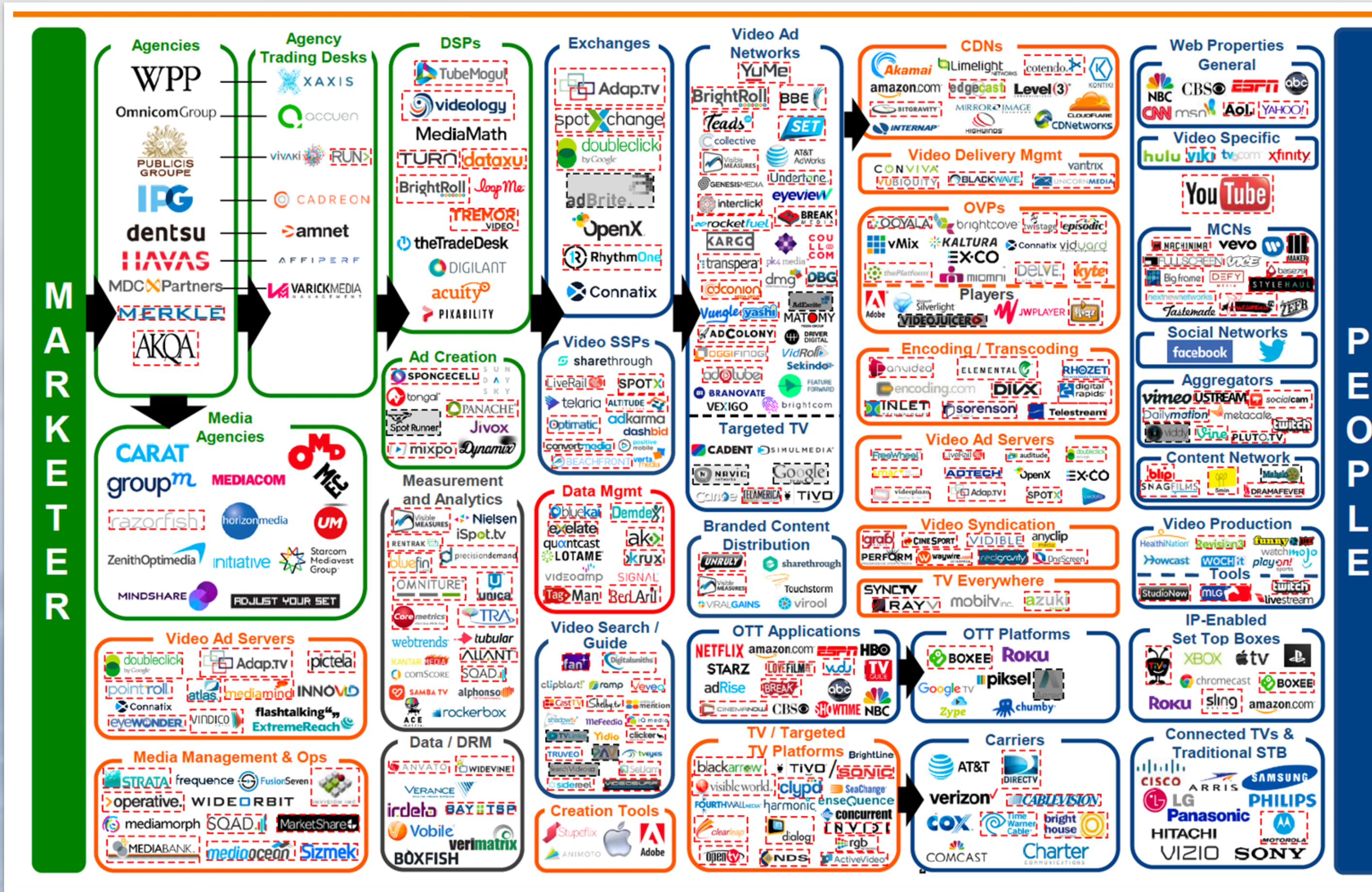
The Video Landscape Continues to Fragment



What is OTT vs. CTV?



Video Landscape









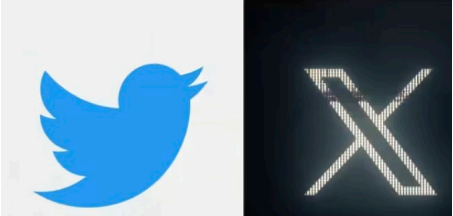


Takeaways

- TV is still relevant.
- Measure, measure, then measure MORE.
- Minimize waste and reduce unwanted frequency.



Social Media LANDSCAPE

Social Platform	Strengths	Primary Audience	Ad Formats	Targeting Options	Reporting & Insights	Best Practices
	<ul style="list-style-type: none"> • Advertisers with organic video • Desire to reach younger audiences 	<ul style="list-style-type: none"> • Highest concentration of audience is between the ages of 18-24 • 50% of audience is under the age of 25 	<ul style="list-style-type: none"> • Full-screen vertical video length :15-3:00 with sound • Overlay text card that includes call to action 	<ul style="list-style-type: none"> • Demo, Audience, Interests & Behaviors, and Device 	<ul style="list-style-type: none"> • Media: cost, imps, clicks, conversions, likes/comments/shares • Audience: gender, age, geo, interest, network, OS, placement 	<ul style="list-style-type: none"> • CPG & retail • Don't use your :30 TV spot for creative
	<ul style="list-style-type: none"> • Reaching business professionals, job occupation targeting 	<ul style="list-style-type: none"> • Older demo as this audience is more career focused • Gender is almost split 50/50 	<ul style="list-style-type: none"> • Sponsored content, sponsored messaging, video, text, dynamic, carousel ads 	<ul style="list-style-type: none"> • Geo, Company, Demo, Education, Job Experience (title, years, function), Interests 	<ul style="list-style-type: none"> • Media: cost, imps, clicks, conversions, engagements, leads • Audience: job title, company, industry, geo 	<ul style="list-style-type: none"> • B2B vertical • Keep headlines concise • Use defined CTAs • A/B test creative versions (1-2 weeks)
 *NHTSA places ads	<ul style="list-style-type: none"> • Largest social platform in the world, robust array of targeting capabilities 	<ul style="list-style-type: none"> • Skews towards an older audience with 41% being between 25-44 • Only 17% of audience is under the age of 25 	<ul style="list-style-type: none"> • Link ad, image carousel, video within Newsfeed, marketplace, stories, messenger and search results 	<ul style="list-style-type: none"> • Demo, Geo, Interests/Behaviors, Job Title • New limitations in targeting users under the age of 18 	<ul style="list-style-type: none"> • Media: imps, views, clicks, likes/shares/comments • Audience: gender, age, geo 	<ul style="list-style-type: none"> • Videos and carousel units encourage engagement • Test multiple CTAs • Fluid between FB and IG for best performance
 *NHTSA places ads	<ul style="list-style-type: none"> • Hosts more creative-driven content such as photos and videos, allows brands to connect closer with users 	<ul style="list-style-type: none"> • Millennials as 30% of user base is between the ages of 25-34 	<ul style="list-style-type: none"> • Image carousel and video within Newsfeed and stories 	<ul style="list-style-type: none"> • Demo, Geo, Interests/Behaviors, Job Title • New limitations in targeting users under the age of 18 	<ul style="list-style-type: none"> • Media: imps, views, clicks, likes/shares/comments • Audience: gender, age, geo 	<ul style="list-style-type: none"> • Videos and carousel units encourage engagement • Test multiple CTAs • Fluid between FB and IG for best performance

Social Platform	Strengths	Primary Audience	Ad Formats	Targeting Options	Reporting & Insights	Best Practices
	<ul style="list-style-type: none"> •Provides high entertainment value with disappearing pictures and short videos 	<ul style="list-style-type: none"> •Gen Z focused as almost 50% of the audience is below the age of 25 	<ul style="list-style-type: none"> •Single image/video, collection, story, lenses AR, commercials, filters 	<ul style="list-style-type: none"> •Demo, Geo, Interests, Look-alike 	<ul style="list-style-type: none"> •Media: imps, swipes, app installs •Audience: demo & interests 	<ul style="list-style-type: none"> •Fun and engaging •Video length max :15 •Timeliness around holidays or popular/trending events
 <p>*NHTSA places ads</p>	<ul style="list-style-type: none"> •Expansive video-only content library •Best platform for long-form videos 	<ul style="list-style-type: none"> •A slight skew towards Millennials but is the most age-diverse of the other social platforms 	<ul style="list-style-type: none"> •Short and long form video ranging from :06 to 15 minutes •Skippable and non-skippable options •Overlays 	<ul style="list-style-type: none"> •Demo, Affinity (habits & interests), and In-Market 	<ul style="list-style-type: none"> •Impressions, Views, VCR, Quartile VCR, Unique Reach, Clicks 	<ul style="list-style-type: none"> •Tailor video lengths to match your objective •Build for mobile device with sound on
 <p>*NHTSA places ads</p>	<ul style="list-style-type: none"> •Ability to engage with users on a 1:1 basis •News and stories that are trending in real time 	<ul style="list-style-type: none"> •60% of the audience is between the ages of 18-44 	<ul style="list-style-type: none"> •Promoted (image, video, carousel, moment, text) •Follower 	<ul style="list-style-type: none"> •Demo, Geo, Conversation, Event, Keyword, Interest, Look-alike, Followers 	<ul style="list-style-type: none"> •Media: reach, frequency, clicks, installs, likes, retweets •Audience: age, geo, gender, incremental reach 	<ul style="list-style-type: none"> •Short text with strong CTA •Video length max :15 •Strong imagery •Limit hashtag usage
	<ul style="list-style-type: none"> •Engaging imagery •Helps boost SEO as the links exist for longer periods of time and click back to your website 	<ul style="list-style-type: none"> •Skews heavy female; Older demo with only 20% of the audience below the age of 25 	<ul style="list-style-type: none"> •Standard image, video, image carousel, collection (mix of image & video) 	<ul style="list-style-type: none"> •Demo, Interests, Keywords, Act-alike 	<ul style="list-style-type: none"> •Pin stats: imps, saves, link clicks •Audience: interests from those who engaged 	<ul style="list-style-type: none"> •CPG/Retail/Home Improvement verticals •Crisp image/video •Ensure links are active and landing page matches image in ad
	<ul style="list-style-type: none"> •Forum style content •Topic based communities •Safe environment •Strong imagery 	<ul style="list-style-type: none"> •Diverse audience due to topic discussions •A little heavier males 18-24 	<ul style="list-style-type: none"> •Video, image, text, or carousel 	<ul style="list-style-type: none"> •Interests and communities, geo-locations 	<ul style="list-style-type: none"> •Media: imps, cost-per-click, cost-per-view, views •Audience: demo & interests & devices 	<ul style="list-style-type: none"> •Have a clear goal in mind •Relate to the community •Creative/message is very important

Facebook

Facebook Users, by Generation US, 2023

Millions

Millennial	58.9
Gen X	44.8
Baby boomer	33.6
Gen Z	30.9

Note: internet users who access their Facebook account via any device at least once per month; Gen Z are individuals born between 1997 and 2012; millennials are individuals born between 1981 and 1996; Gen X are individuals born between 1965 and 1980; baby boomers are individuals born between 1946 and 1964

Source: Insider Intelligence | eMarketer, May 2023

Insider Intelligence | eMarketer

Facebook User Penetration, by Race/Ethnicity US, 2023

% of Population

White	53.5%
Hispanic*	53.3%
Black	50.7%
Asian	46.2%
Other**	45.2%

*Note: internet users who access their Facebook account via any device at least once per month; *can be of any race; **includes Native Americans, Alaska Natives, Hawaiian and Pacific Islanders, and bi- and multiracial individuals*

Source: Insider Intelligence | eMarketer, May 2023

Insider Intelligence | eMarketer



Instagram

Instagram User Penetration, by Age US, 2023

% of Population

0-11	4.9%
12-17	57.3%
18-24	78.4%
25-34	78.6%
35-44	59.0%
45-54	39.0%
55-64	22.8%
65+	10.2%

Note: internet users who access their Instagram account via any device at least once per month

Source: Insider Intelligence | eMarketer, May 2023

Insider Intelligence | eMarketer

Instagram User Penetration, by Race/Ethnicity US, 2023

% of Population

Hispanic*	51.2%
Black	41.4%
White	40.2%
Asian	40.1%
Other**	35.6%

*Note: internet users of any age who access their Instagram account via any device at least once per month; *can be of any race; **includes Native Americans, Alaska Natives, Hawaiian and Pacific Islanders, and bi- and multiracial individuals*

Source: Insider Intelligence | eMarketer, May 2023

Insider Intelligence | eMarketer



X/Twitter

Twitter Users, by Generation US, 2023

Millions

Millennial	18.4
Gen Z	18.3
Gen X	11.2
Baby boomer	5.8

Note: internet users who access their Twitter account via any device at least once per month; Gen Z are individuals born between 1997 and 2012; millennials are individuals born between 1981 and 1996; Gen X are individuals born between 1965 and 1980; baby boomers are individuals born between 1946 and 1964

Source: Insider Intelligence | eMarketer, May 2023

Insider Intelligence | eMarketer

Twitter User Penetration, by Race/Ethnicity US, 2023

% of Population

Black	21.7%
Hispanic*	21.0%
Other**	17.9%
White	14.7%
Asian	9.1%

*Note: internet users of any age who access their Twitter account via any device at least once per month; *can be of any race; **includes Native Americans, Alaska Natives, Hawaiian and Pacific Islanders, and bi- and multiracial individuals*

Source: Insider Intelligence | eMarketer, May 2023

Insider Intelligence | eMarketer



Threads



Threads

Most US Gen Zers Have Heard of Threads, but Few Use It Regularly, July 2023

% of respondents

Heard of it, but I haven't downloaded it

34.7%

Have not heard of it

25.4%

Have been using it rarely

11.4%

Have been using it daily

11.3%

Have been using it weekly

10.1%

Downloaded it, but haven't used it

7.0%

Note: n=1,005 ages 15-26

Source: Insider Intelligence | eMarketer, "US Gen Z social media survey 2023," Aug 2023

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Insider Intelligence | eMarketer



Takeaways

- Gen Z are true digital pioneers.
- Millennials are more stable and reliable.
- Can Meta turn Threads around?
- Monitor and Evolve with the audience



Questions ?