

THE PLAY FOR THE WHITE HOUSE

The 2024 Presidential Report: Part II

DATA IS COLLECTED AS OF 10/07/24





SOURCING AND METHODOLOGY

ALL DATA IS COLLECTED AS OF 10/07/24

AdImpact has tracked more than 253 unique broadcast political advertisements and 904K broadcast airings targeting the Presidential election since Super Tuesday.

AdImpact classifies up to three issues as the primary focus of each ad based on the narration and video. Candidates' Victory Fund and Joint Fundraising Committee spending is included in the candidate spending totals.

2024 debate viewership is generated from data collected through AdImpact's Advanced TV panel of monitored Smart TVs, totaling 23 million TVs. This data includes viewing patterns and devices tracked using automated content recognition technology. Please note, Paramount Plus and Hulu are not included in streaming estimates.

INTRO

Since Super Tuesday, the Presidential election has seen \$2.1B in spending and future reservations, with Democrats spending \$1.3B compared to Republicans' \$768M. Even though Democrats hold a significant spending advantage, polling has the election in a dead heat.

Following Harris' elevation to the top of the Democratic ticket in late July, Democrats spent \$1.1B on aired ads and future reservations, over \$400M more than Republicans. Even with this monumental shift in the race, the battleground states have remained unchanged.

Between Super Tuesday and Biden's exit, Arizona, Georgia, Michigan, North Carolina, Nevada, Pennsylvania, and Wisconsin saw 74% of total Presidential ad spending. Since Harris entered the race, they have received 79% of total aired spend and are currently set to receive 88% of future reservations.

With 26 days until November 5th, the election is still decidedly a toss-up. This report highlights where Presidential campaigns and their associated issue groups are dedicating their advertising resources and which messages are dominating the airwaves.





HOW WE GOT HERE

Before Super Tuesday, the 2024 Presidential race saw over \$400M in total ad spending: \$312M from Republicans, \$79M from Democrats, and \$8.6M from Independents. In total, there were 14 candidates who saw over \$500K in total ad support before ultimately suspending their campaigns.

President Joe Biden, who saw \$321M in total support before he dropped out in July, saw the most support. Nikki Haley, the last threat to Donald Trump's candidacy, saw \$94M in ad support before she dropped out in March. Former President Donald Trump, meanwhile, saw \$63M in total ad support before Super Tuesday.

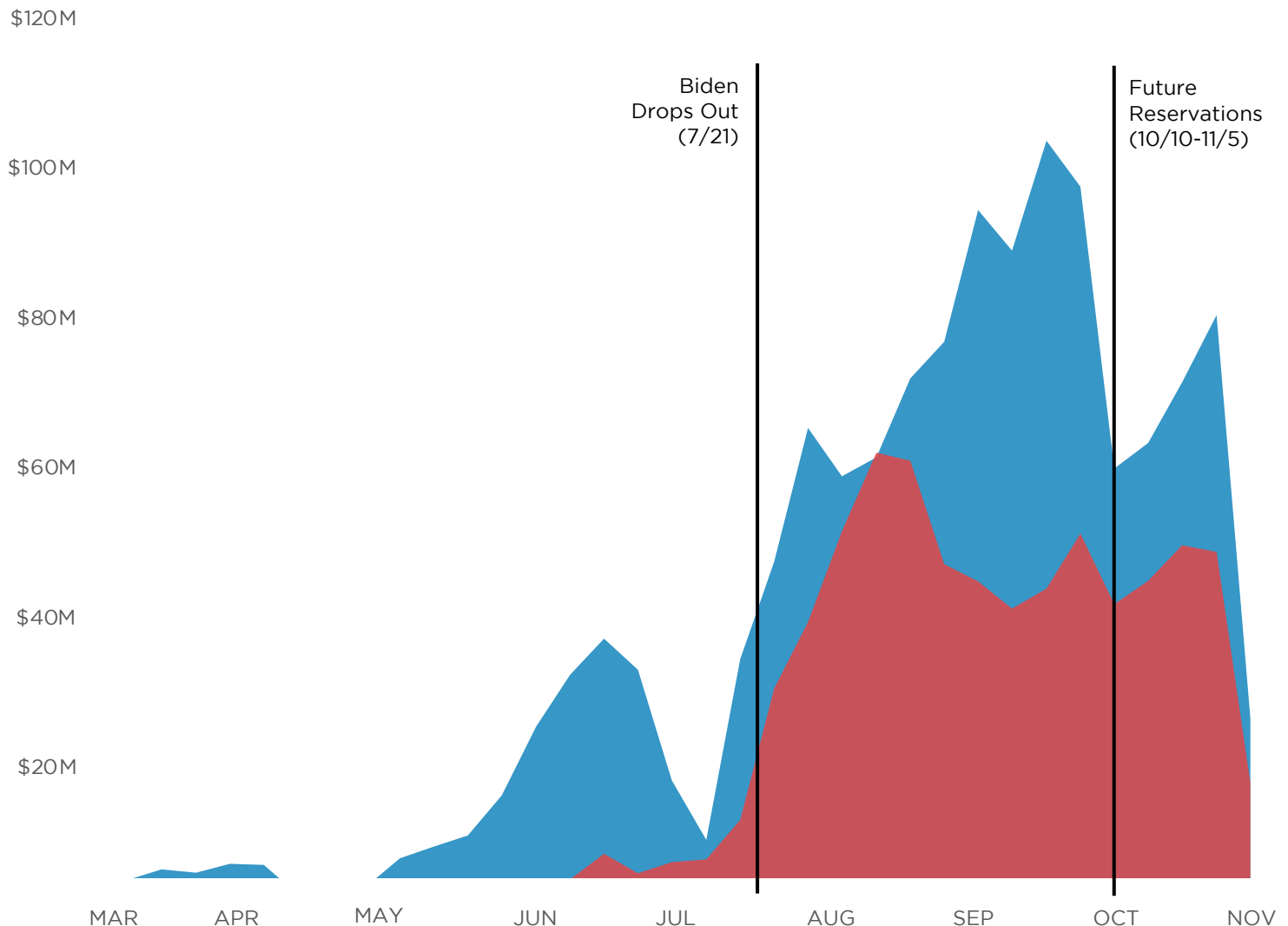




AD SPENDING SINCE SUPER TUESDAY

Donald Trump and Joe Biden's last major primary opponents dropped out of the race shortly after Super Tuesday. This seemingly set the stage for a 2020 general election rematch this November. Between Super Tuesday and July 21st, the Presidential election saw \$333M in aired spending: \$254M from Democrats and \$79M from Republicans.

On July 21st, Biden's historic dropout announcement shifted the Democratic ticket. Vice President Kamala Harris has since taken over the top of the ticket. Since then, Democrats have outspent Republicans in aired ads by \$322M. As of October 7th, Democrats also lead Republicans in future reservations: \$266M to \$178M.

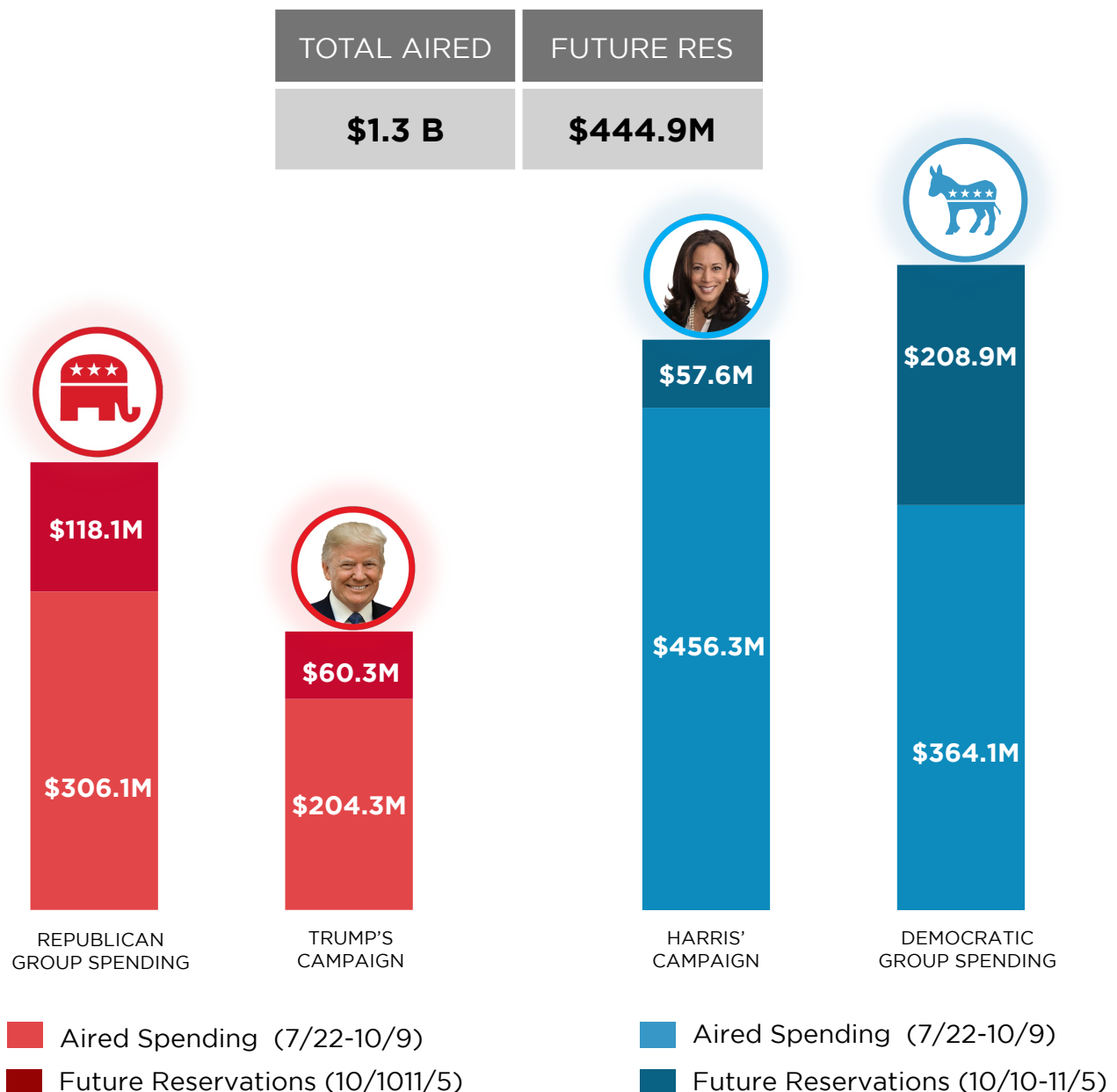




CANDIDATE VS GROUP SPENDING SINCE 7/22

Between July 22nd and October 9th, Democratic Issue Groups spent \$364M compared to \$306M from their Republican counterparts. They also have a significant advantage in future reservations: \$209M to \$118M.

The Harris and Trump campaigns are the first and second largest spending advertisers in the Presidential race. While the Harris campaign has nearly a 2:1 aired spending advantage over the Trump campaign, Trump currently has a slight \$2.7M advantage in future reservations.

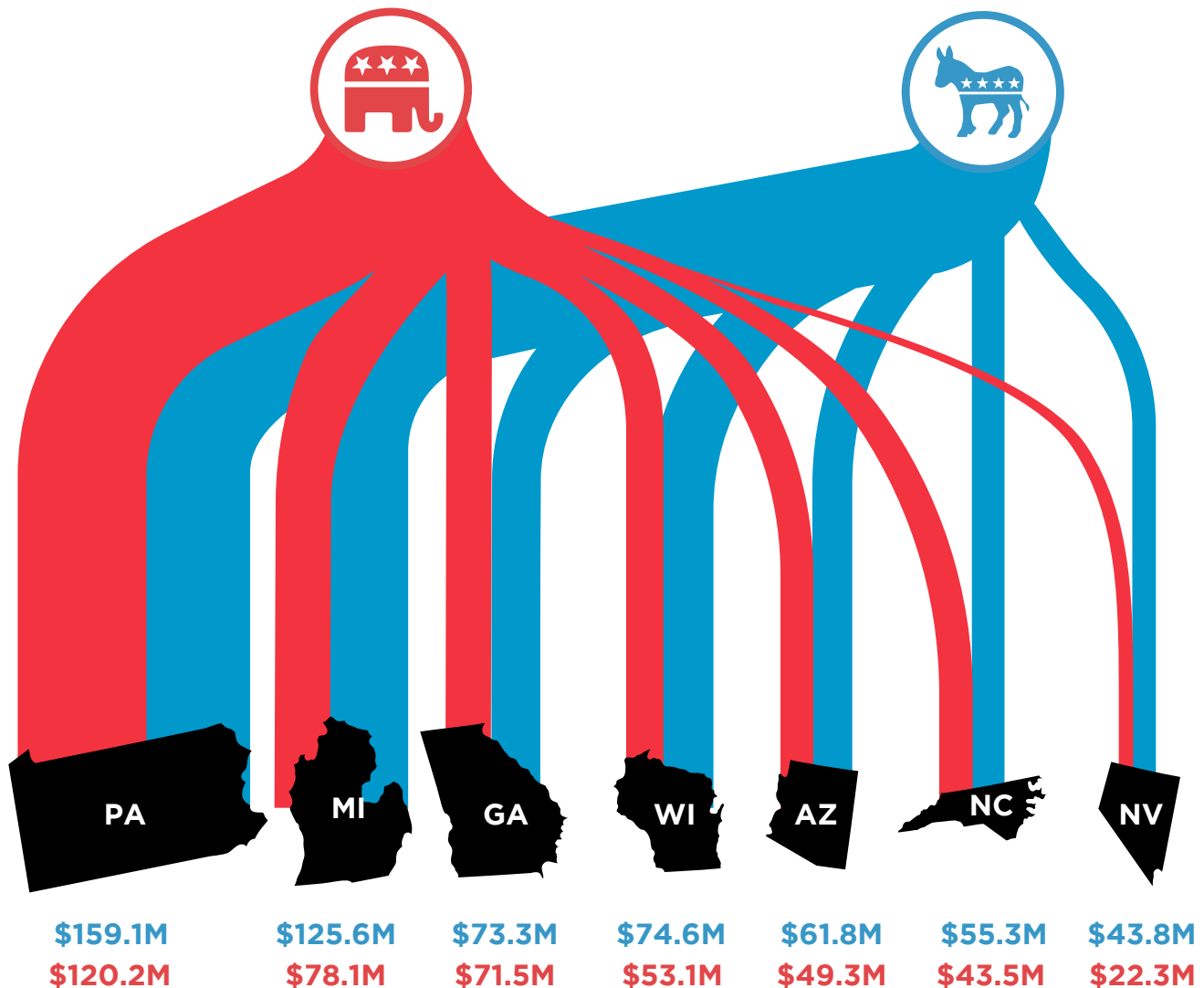




SPENDING AIRED SINCE 7/22 IN THE BATTLEGROUND STATES

Between July 22nd and October 8th, seven battleground states saw \$1B in aired spending. Since Part I of this report was released on August 23rd, AdImpact has tracked an additional \$500M in aired spending across these states.

Democrats have outspent Republicans in each battleground. The Omaha market, home to Nebraska's split electoral vote, saw \$9.4M in aired spending. Pennsylvania, the state receiving the most spending, makes up 21% of all aired Presidential spending since July 22nd.

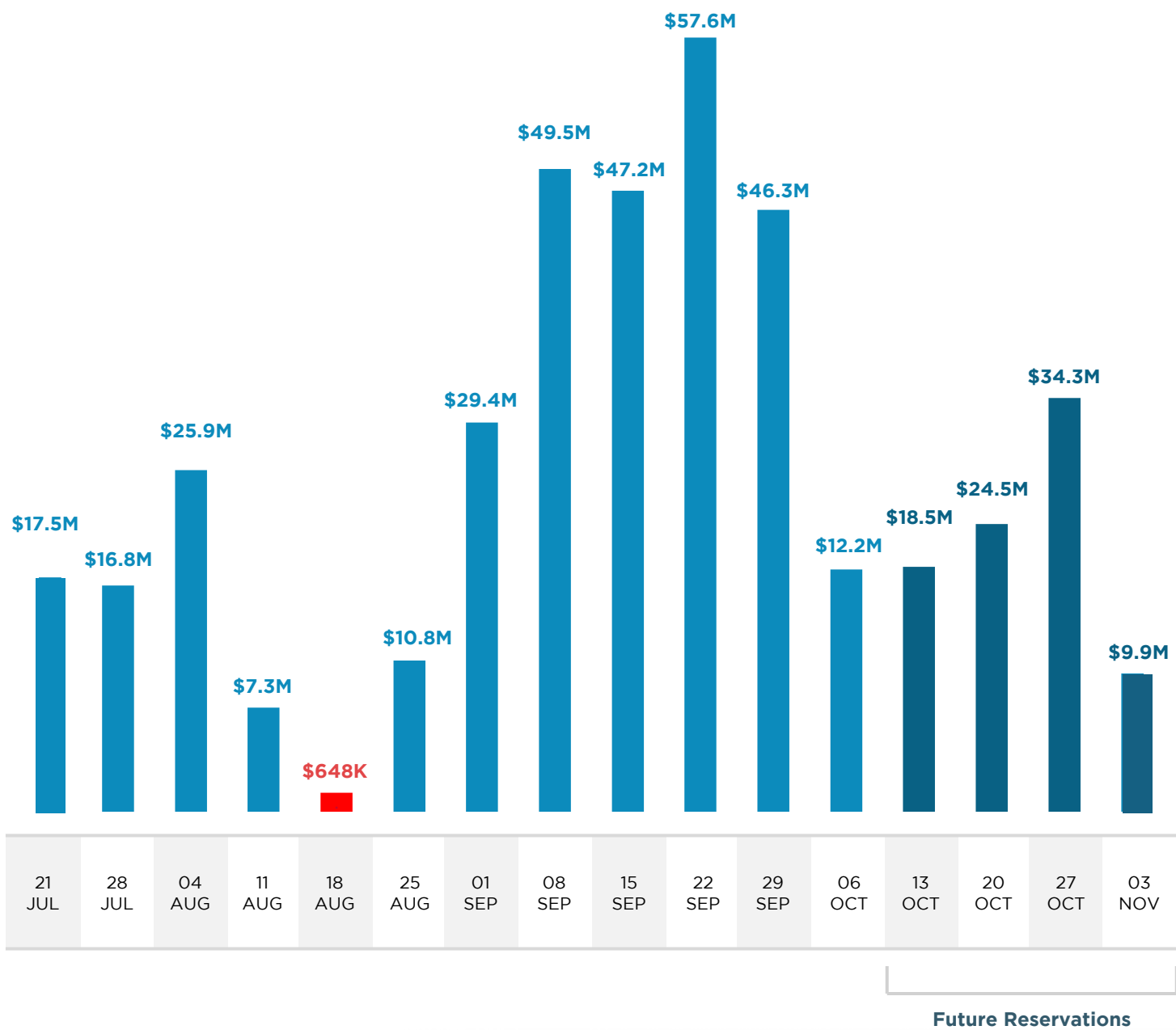




WEEKLY SPEND ADVANTAGE

Since Biden dropped out of the presidential race, Democrats have outspent Republicans in 11 out of 12 weeks. Since then, the week of 9/29 saw the most Presidential ad activity, with Democrats spending \$97.6M and Republicans spending \$51.3M.

The week of October 27th is currently on track to see the most spending this fall, with \$129M reserved. After the week of October 6th, Democrats have an average of \$60.5M booked per week, compared to \$40.2M from Republicans.

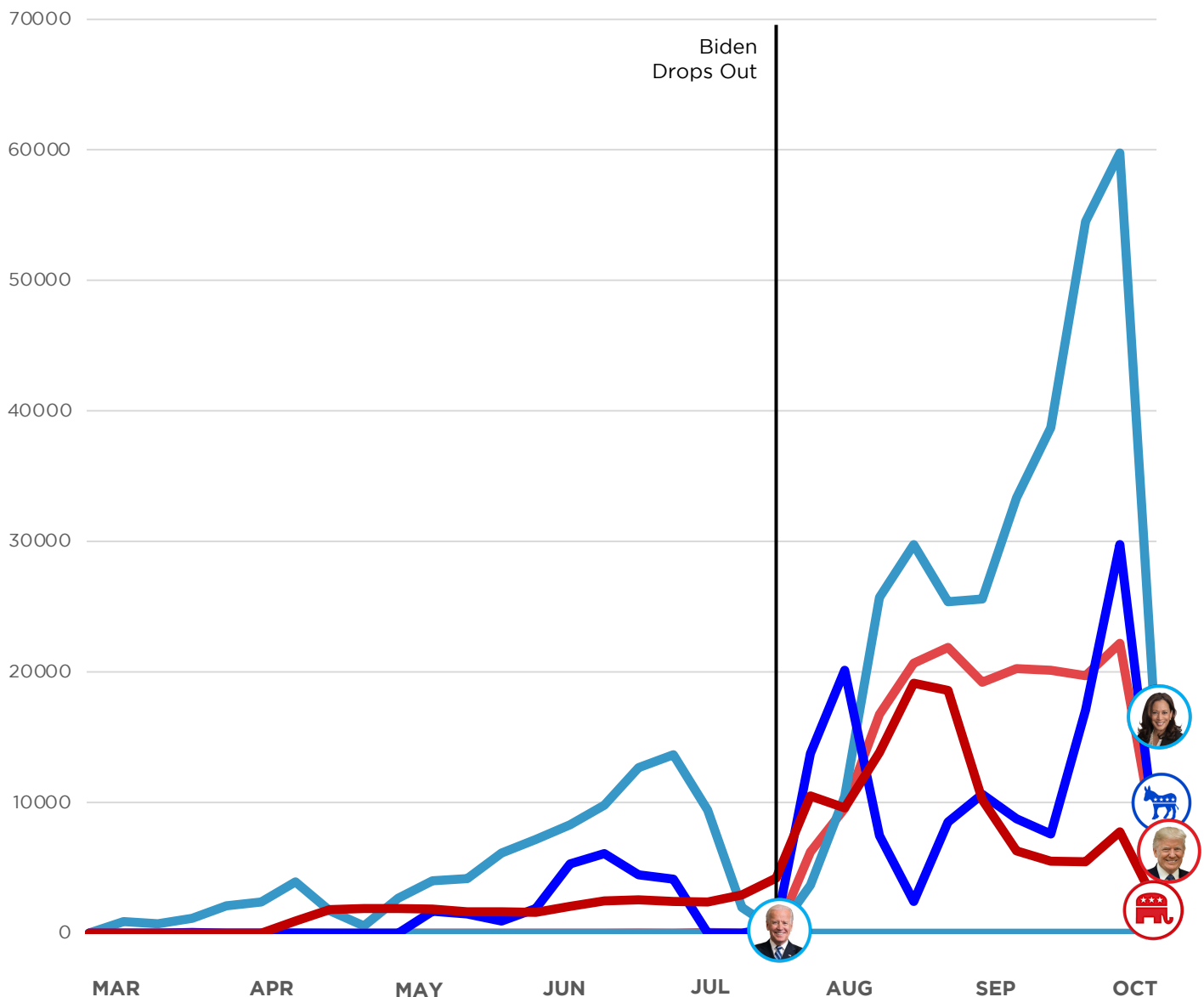




BROADCAST AD AIRINGS

Since Super Tuesday, over 253 unique Presidential broadcast ads have hit the airwaves, totaling 904K airings. Democratic advertisers make up 64% of these airings.

Since September 22nd, both campaigns have been on the air each week. The week with the most Presidential ad airings so far has been 9/29 with 120K airings.



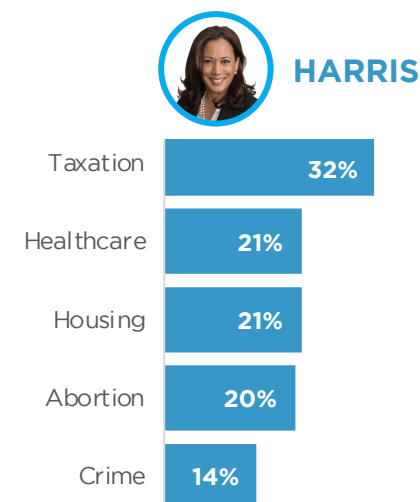
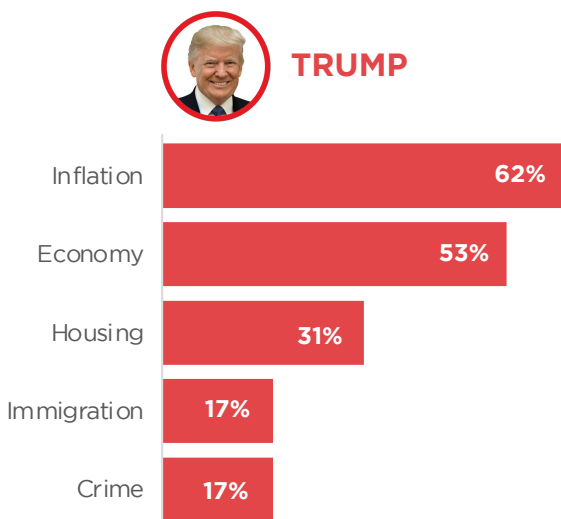


TOP MENTIONED ISSUES IN BROADCAST ADS

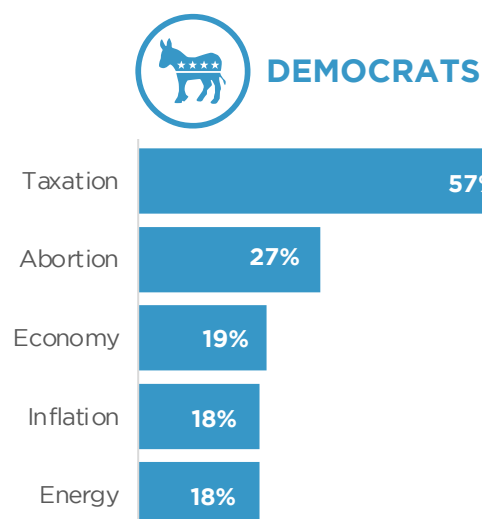
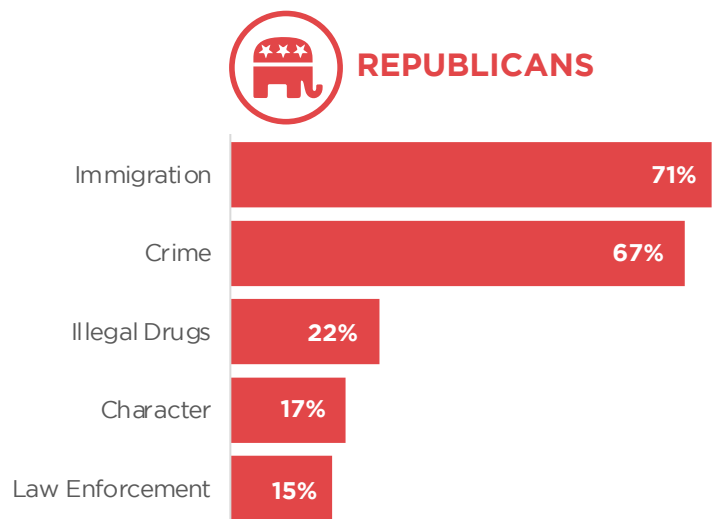
Since July 22nd, Taxation has been the leading issue in the Harris campaign (32%) and Democratic issue group's (57%) broadcast airings. Abortion has also featured prominently for Democrats, ranking as the fourth most aired issue for Harris and second for Democratic groups.

Over the same time, the Trump campaign's leading issue has been inflation, making up 62% of their total airings. Conversely, this has not been a top issue among Republican issue groups, which have instead focused heavily on immigration (71%) and crime (67%).

CAMPAIGNS



ISSUE GROUPS

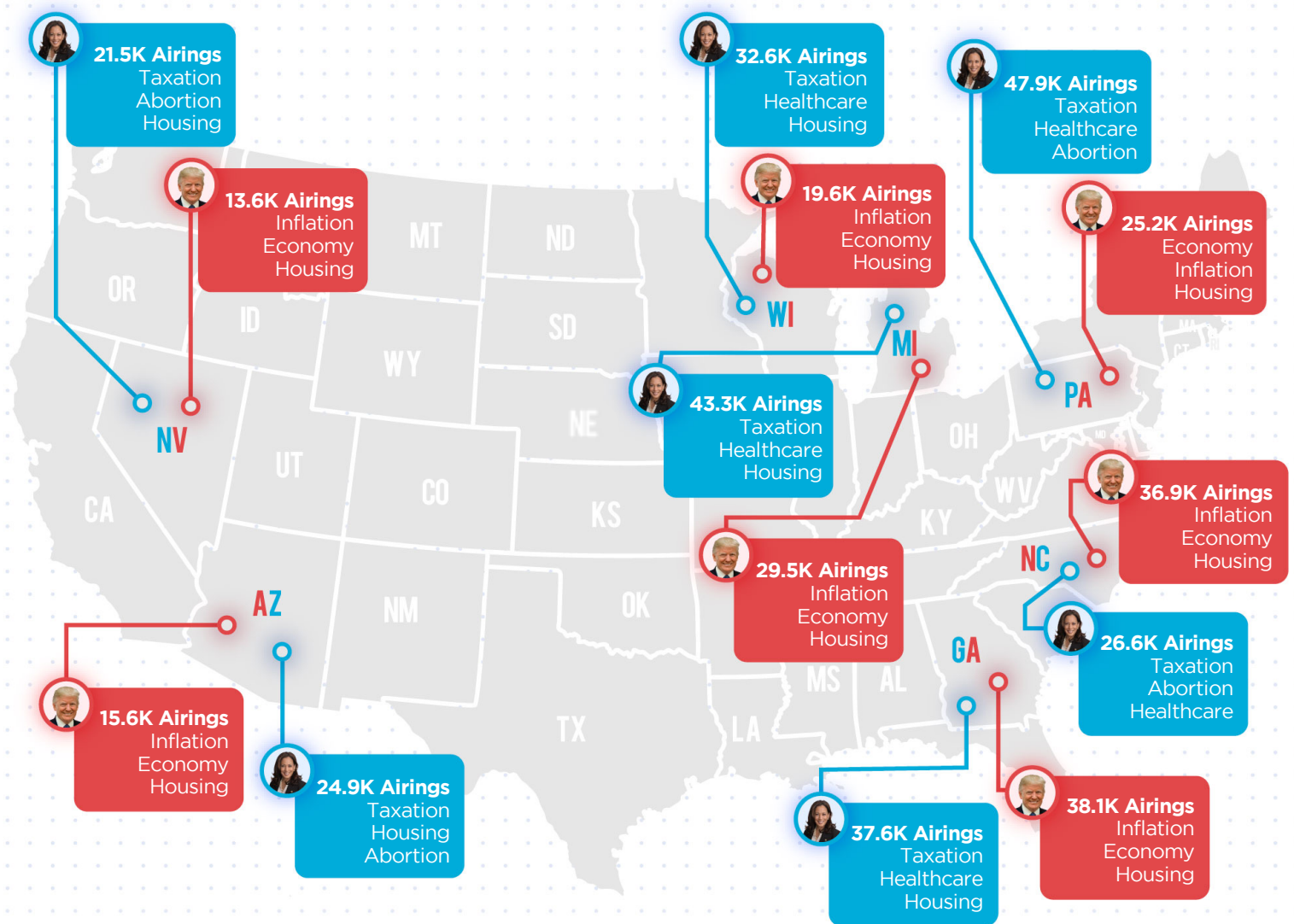




CANDIDATE BROADCAST AIRINGS IN BATTLEGROUND STATES

Since she entered the race, the Harris campaign has 138K more broadcast airings than the Trump campaign. The Harris campaign has 234K airings across the seven battleground states, leading the Trump campaign in each except Georgia and North Carolina.

Harris has focused her messaging on taxation, healthcare and housing, across each battleground, with abortion appearing as an additional top issue in Nevada, North Carolina, and Arizona. Trump has centered his messaging on inflation, the economy, and housing instead, though he has followed a similar strategy of running a consistent message in each battleground.

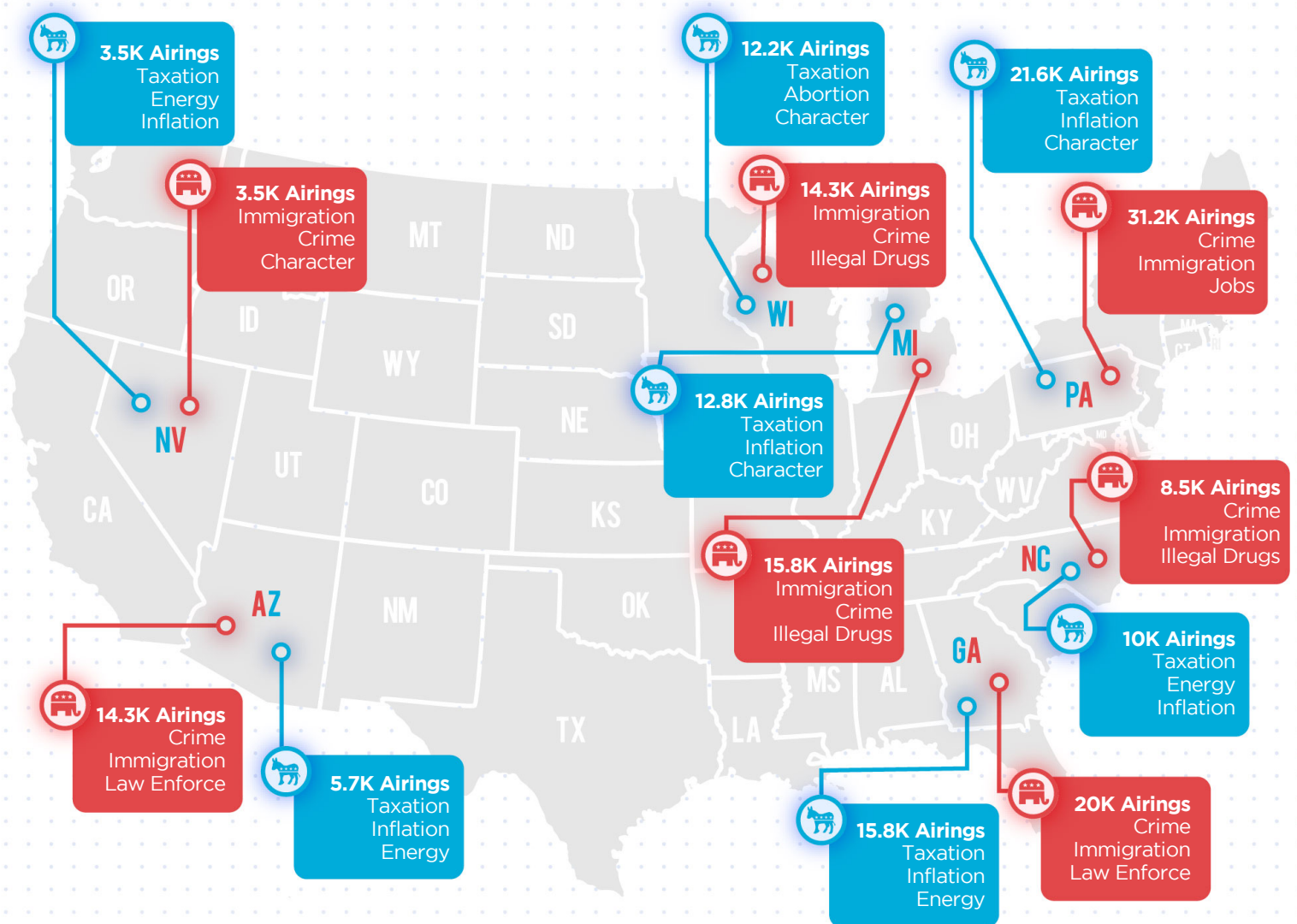




ISSUE GROUP BROADCAST AIRINGS IN BATTLEGROUND STATES

Since July 22nd, Democratic and Republican issue groups have aired a combined 247K airings, with Democratic issue groups holding an 20k airing advantage.

Democratic Issue groups have focused on taxation, abortion and the economy, with 62% of their total airings occurring battleground states. Republican issue groups have focused on immigration, crime, and illegal drugs with 95% of their airings occurring in battleground states.





MOST AIRED BROADCAST ADS

BY CANDIDATES



Aired: **34K Times**

Issues: **Character**

Most Aired States: **PA, MI, GA**



Aired: **27K Times**

Issues: **Economy, Inflation**

Most Aired States: **GA, NC, MI**



BY ISSUE GROUPS



Aired: **25K Times**

Issues: **Abortion, Economy**

Most Aired States: **TX, WI, MI**



Aired: **20K Times**

Issues: **Crime, Immigration**

Most Aired States: **NC, GA, PA**





DEBATE VIEWERSHIP

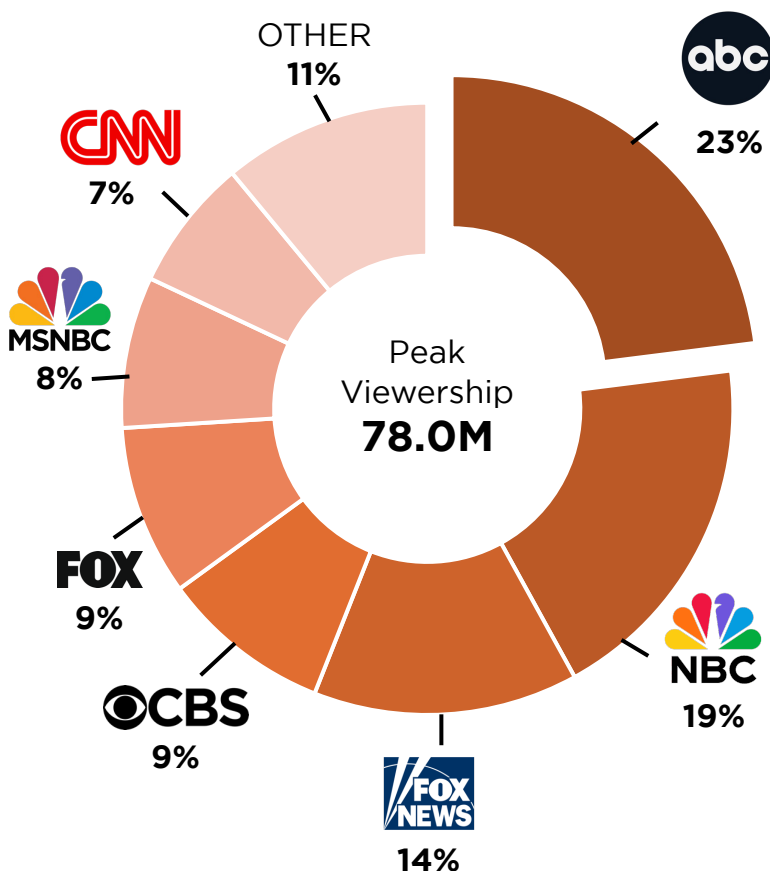
AdImpact estimates a peak of 78.0M viewers tuned into the September 10th Presidential debate between Kamala Harris and Donald Trump. The host network of ABC saw the largest share of viewers at 23%.

We saw 11 Presidential advertisers air an ad during the debate. The first broadcast TV ad featuring clips from the debate aired three days later on September 13th.

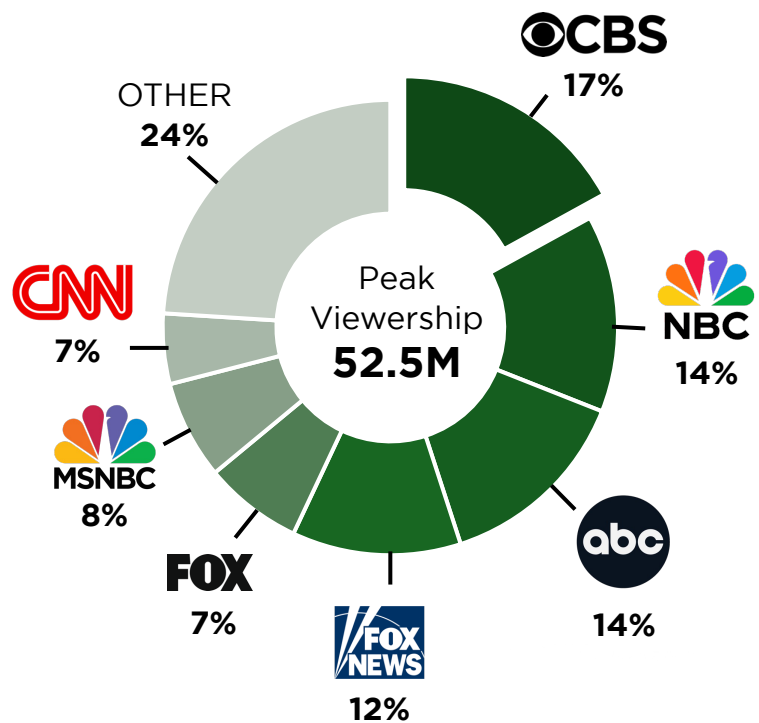
In comparison, we estimated the Vice Presidential debate between Tim Walz and JD Vance saw a peak of 52.5M viewers. CBS, the host network saw the largest share of viewers at 17%.

We saw 5 Presidential advertisers air an ad during the VP debate.

**PRESIDENTIAL
DEBATE**



**VICE PRESIDENTIAL
DEBATE**



THE PLAY FOR THE WHITE HOUSE



ABOUT US

AdImpact is a leading advertising and market intelligence company. We specialize in tracking and analyzing advertising data across various media channels, including traditional, digital, and emerging platforms. Our real-time monitoring captures over one billion TV ad occurrences daily. We maintain the industry's largest ad catalog of over 1.6m unique creatives. Our coverage extends

across all 210 designated market areas (DMAs), over 41,000 zip codes, and over 20 million IP addresses. Currently, we capture data and analytics for over 88,000 brands and advertisers. Our reliable real-time data and analytics empower users to monitor competitor ad occurrences, spending, messaging, and creatives, facilitating quick and informed decision-making.



QUESTIONS?
LET'S TALK

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