

THE PLAY FOR THE WHITE HOUSE

The 2024 Presidential Report: Part I

DATA IS COLLECTED AS OF 8/23/24.





SOURCING & METHODOLOGY

DATA IS COLLECTED AS OF 8/23/24

AdImpact has tracked more than 134 unique broadcast political advertisements and 372K 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 videos.

The 2024 Republican National Convention and Democratic National Convention viewership visual 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.

INTRO

The 2024 Presidential election appeared set to host a 2020 rematch between former President Donald Trump and President Joe Biden, the first time two Presidents would square off against one other since 1892. On July 21st, President Biden's announcement that he would not seek reelection changed everything. Biden endorsed Vice President Kamala Harris, who officially accepted the Democratic nomination for President last week.

With both party conventions concluded, the race is set. AdImpact has compiled this report analyzing Presidential advertising spending and messaging since Super Tuesday, including current future reservations through election day. So far, we've tracked \$778M in Presidential ad spending and 349K broadcast airings since Super Tuesday. Currently, we've also tracked \$428M in future Presidential ad reservations. We project the Presidential general election to reach \$2.16B.

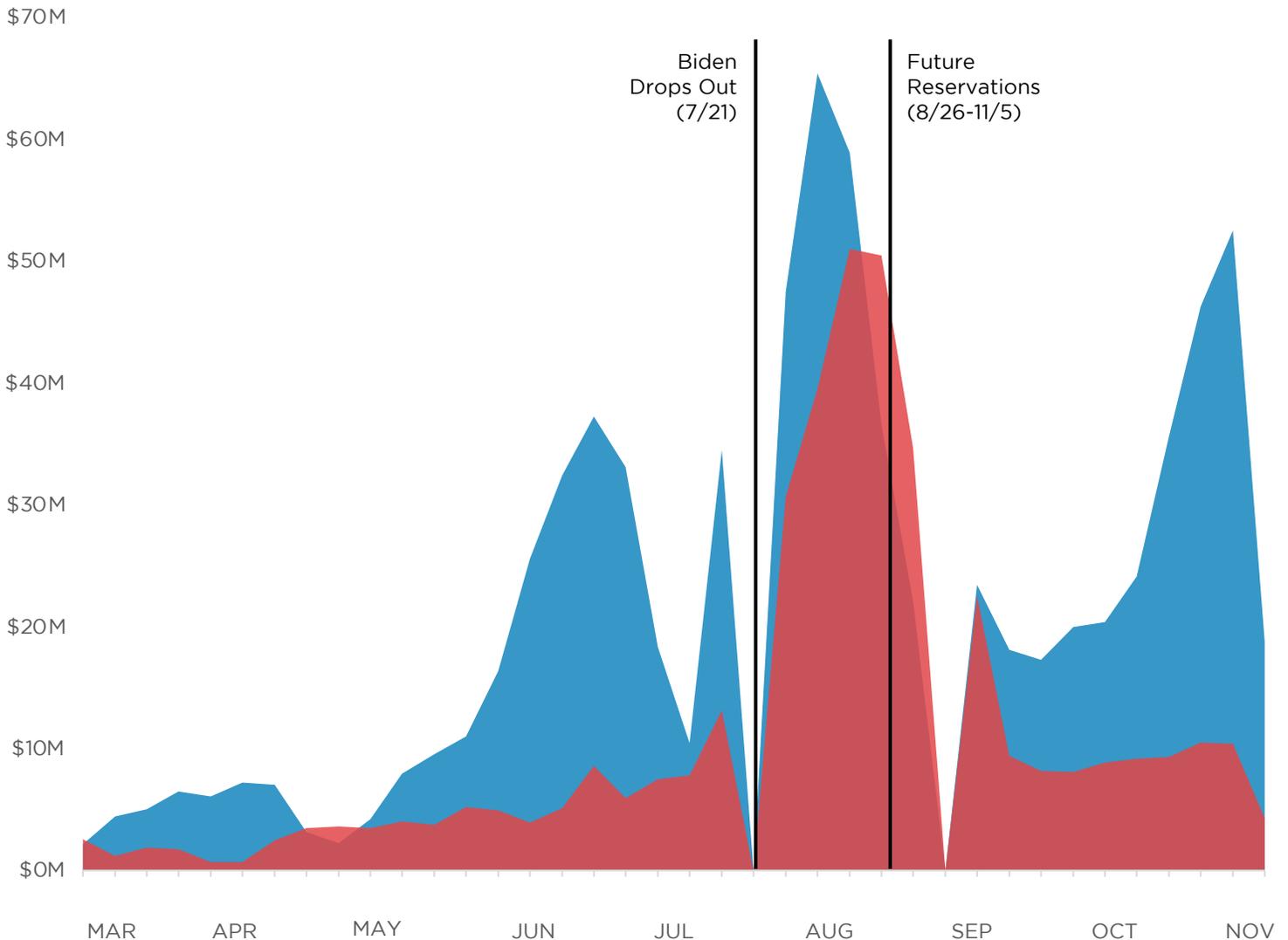




AD SPENDING SINCE SUPER TUESDAY

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 \$336M in aired spending: \$254M from Democrats and \$79M from Republicans.

On July 21st, Biden's historic dropout announcement shifted the Democratic ticket. He endorsed Vice President Kamala Harris, who has since become the Democratic Presidential nominee. Since July 21st, Democrats have outspent Republicans in aired ads by \$55M. As of 8/26, Democrats also currently lead Republicans in future reservations: \$296M to \$132M.

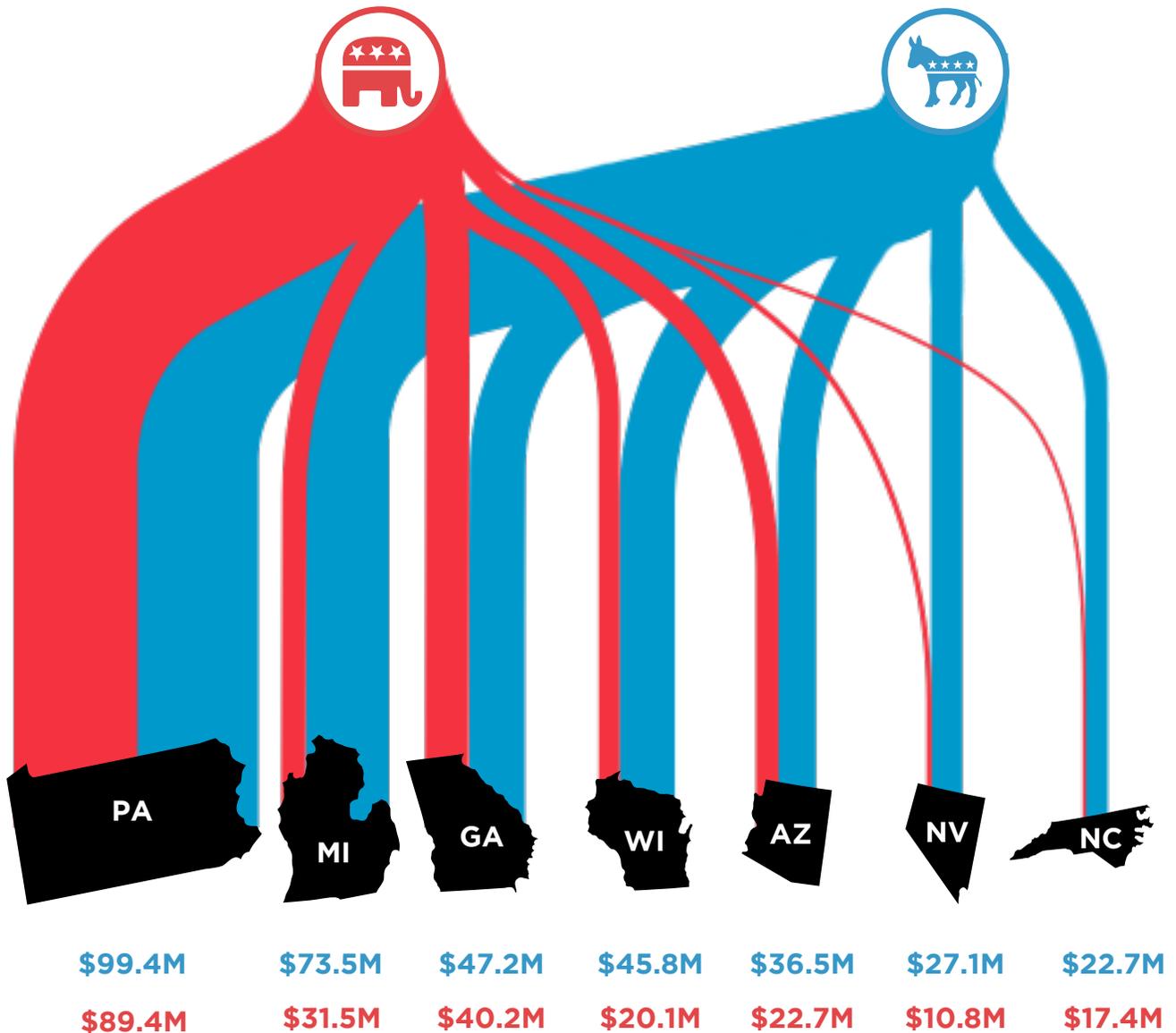




SPENDING AIRED IN THE BATTLEGROUND STATES

Between Super Tuesday and today, seven battleground states saw \$589M in aired spending.

Democrats outspent Republicans in each state. The Omaha market, home to Nebraska's split electoral vote, saw \$4.5M in aired spending.



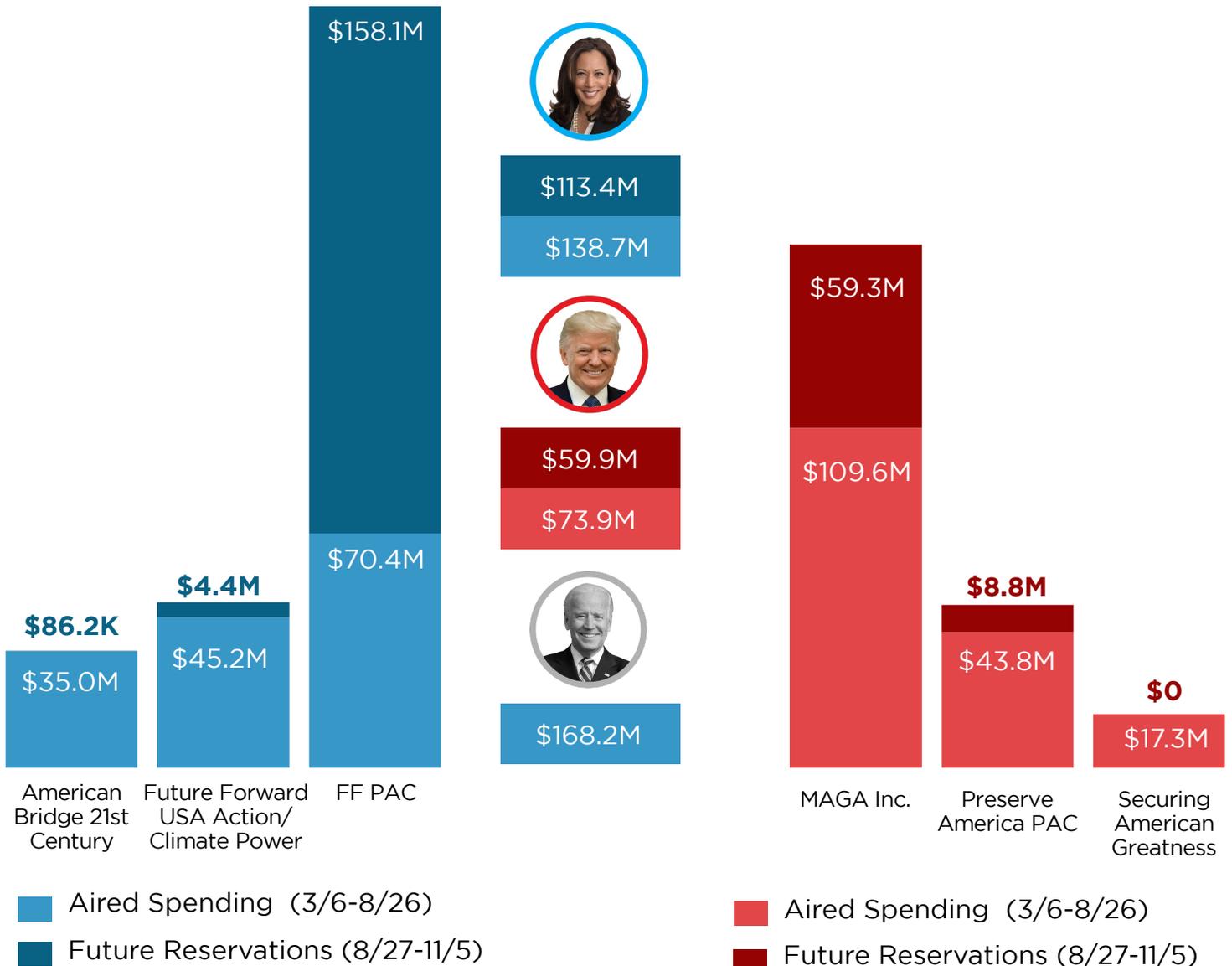


TOP ADVERTISERS

Since Super Tuesday, over 270 advertisers have placed ads or future reservations targeting the Presidential contest. Harris leads Trump in campaign ad spending and currently holds an advantage in future reservations.

Outside groups have placed 64% of Presidential ad spending and reservations since Super Tuesday. Democratic group, Future Forward is the top spending advertiser by total spending and future reservations.

CAMPAIGN SPENDING

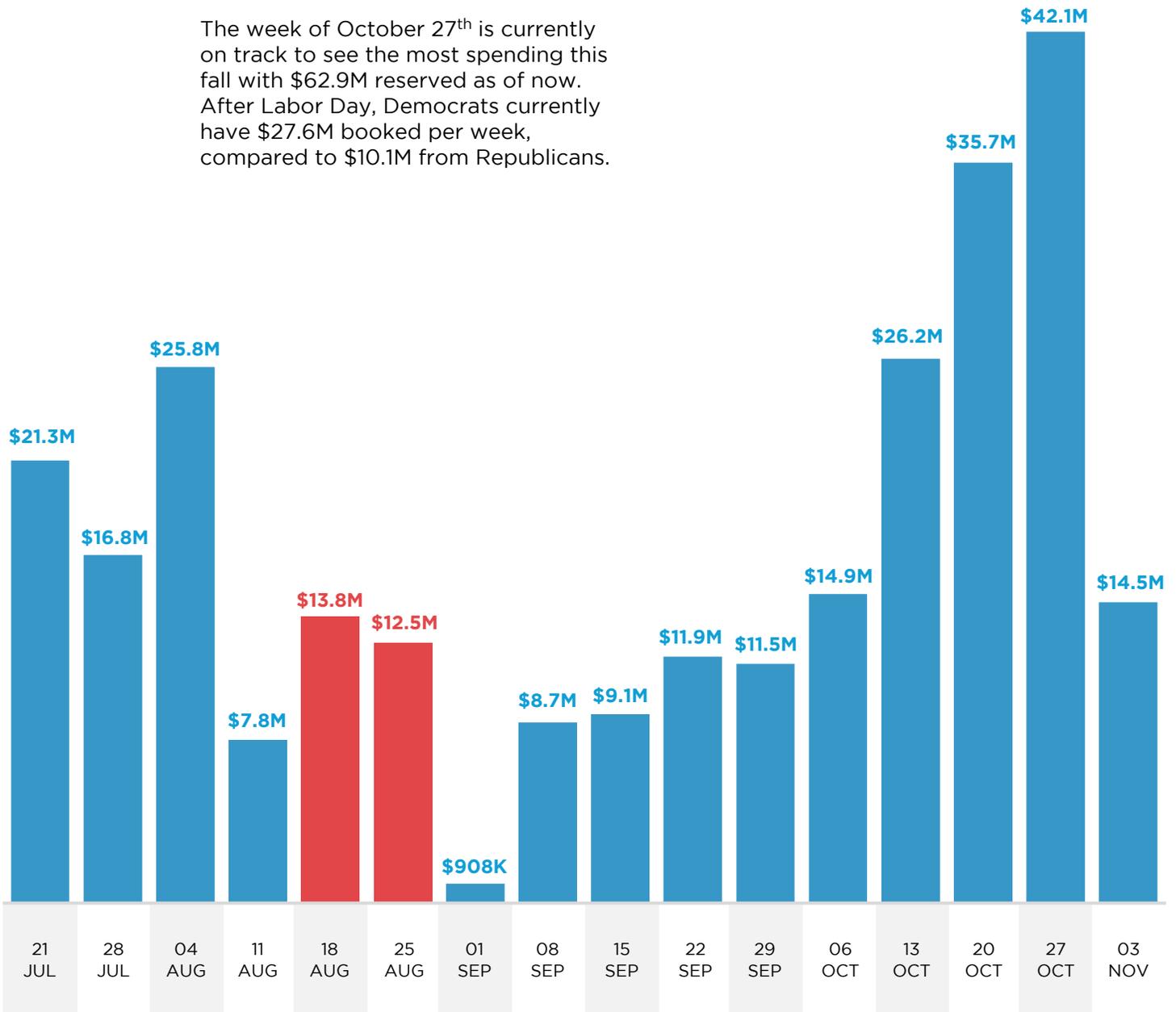




WEEKLY SPEND ADVANTAGE

Democrats outspent Republicans in four out of the five weeks since Biden dropped out of the Presidential race. Since then, the week of August 11th saw the most Presidential ad activity with Democrats spending \$59M and Republicans spending \$51M.

The week of October 27th is currently on track to see the most spending this fall with \$62.9M reserved as of now. After Labor Day, Democrats currently have \$27.6M booked per week, compared to \$10.1M from Republicans.



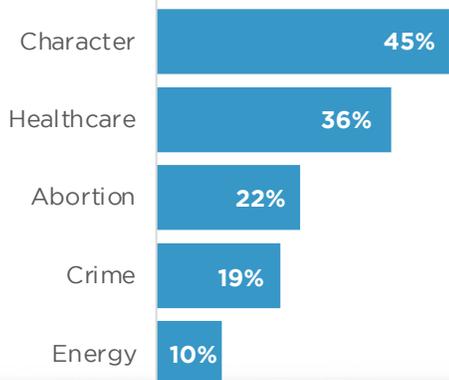
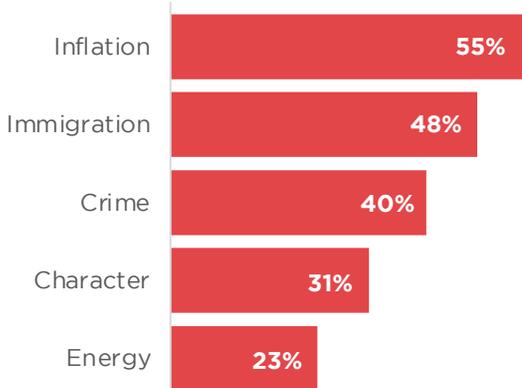


TOP MENTIONED ISSUES IN BROADCAST ADS

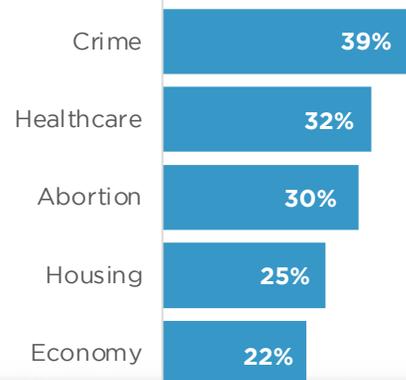
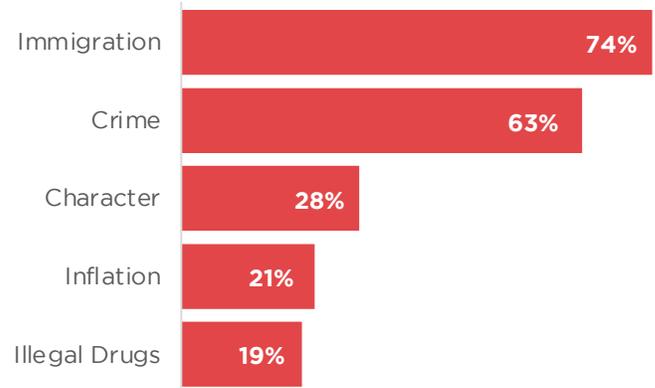
Prior to Biden dropping out of the race, Democratic ads focused on the character of each candidate, healthcare and abortion. Since Harris replaced Biden at the top of the ticket, Democrats have focused more on crime, the economy and housing in their ads. After Biden dropped out, Republican advertisers focused less on inflation and increased their immigration and crime messaging.

Since 7/22, ad messaging from both parties has turned to defining Kamala Harris's candidacy. Republicans wasted little time in targeting Harris, as an attack ad from MAGA Inc. aired within hours of Biden's dropout announcement. The Vice President has been mentioned in 79% of all broadcast ad airings since Biden dropped out: 99% in Republican airings and 58% from Democrats.

PRE-BIDEN DROP OUT



POST-BIDEN DROP OUT





BROADCAST AD AIRINGS

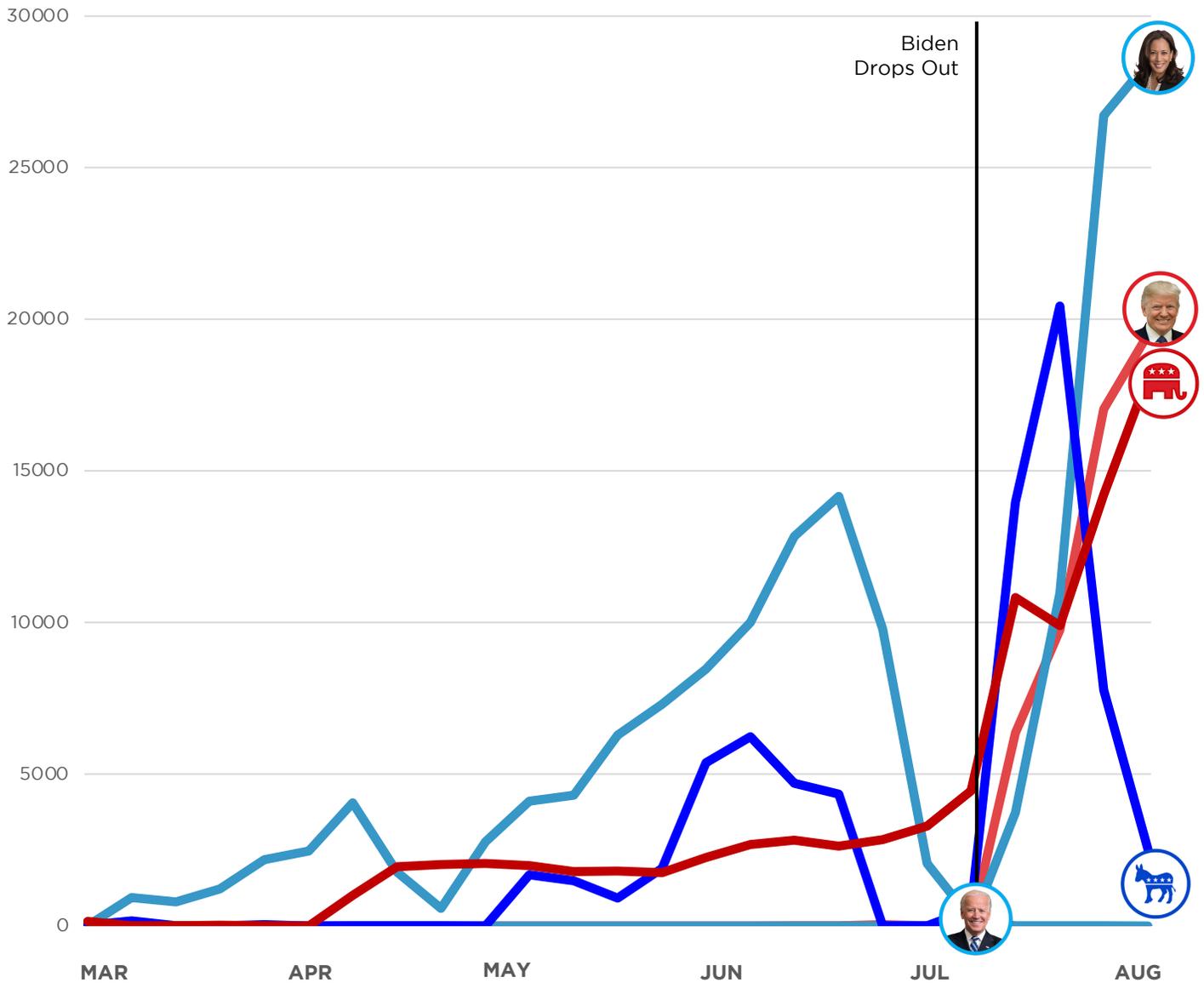
Since Super Tuesday, over 134 unique Presidential broadcast ads have hit the airwaves, totaling 372K airings.

Democratic advertisers make up 62% of these airings.

In 2024, Biden's campaign aired broadcast ads in 26 of the 30 weeks before he dropped out. During that time, Trump's campaign aired ads in only 10 weeks. Harris' first campaign ad aired on July 30th and she's been on air every week since.

ADVERTISER

Dem Group GOP Group



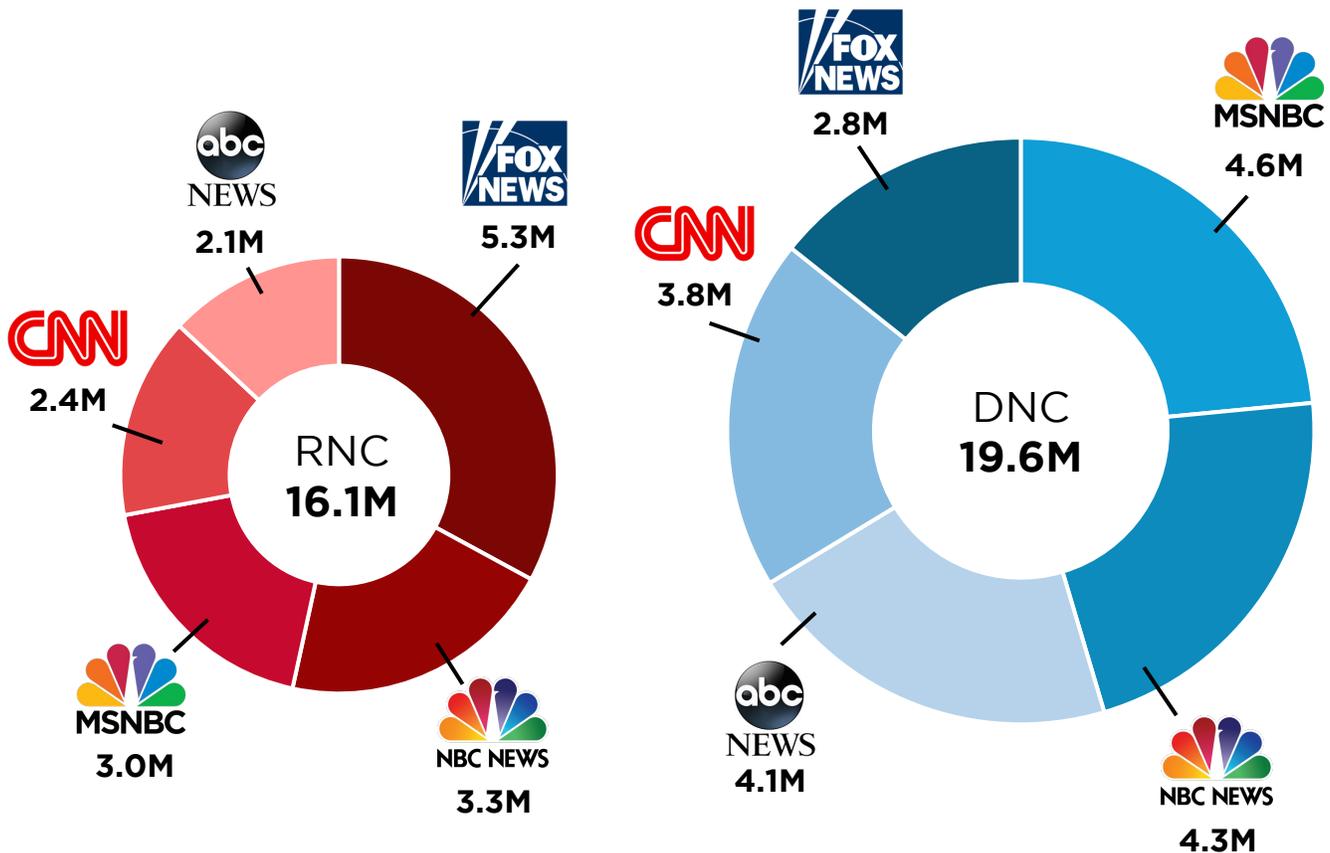


PARTY CONVENTION VIEWERSHIP

Party Convention Viewership at Time of Harris or Trump Speech

AdImpact analyzed viewership data from ABC, CNN, Fox News, MSNBC, and NBC for the nominee speeches at the Republican National Convention and the Democratic National Convention.

On those five networks, our estimates indicate that 3.5M more viewers tuned in to watch Harris' speech than Trump's. Of those networks, MSNBC attracted the most viewership for the Harris speech during the DNC, while Fox News had the highest viewership for Trump's speech at the RNC.



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 90,000 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

✉ info@adimpact.com

🌐 AdImpact.com