



# VOTERX

The What NOW Research Project

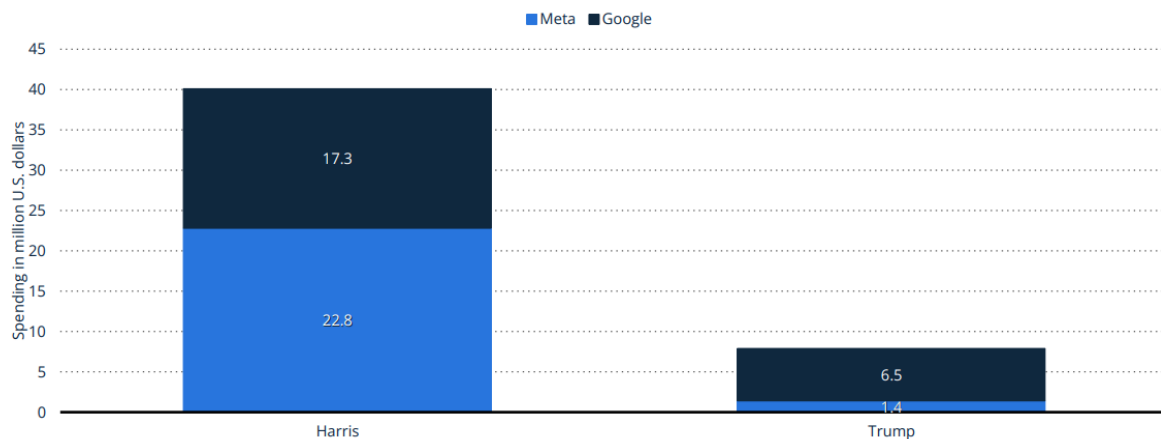
# **PRESIDENTIAL ELECTION AD SPEND**

# Presidential Election – Ad Spend **Insights**

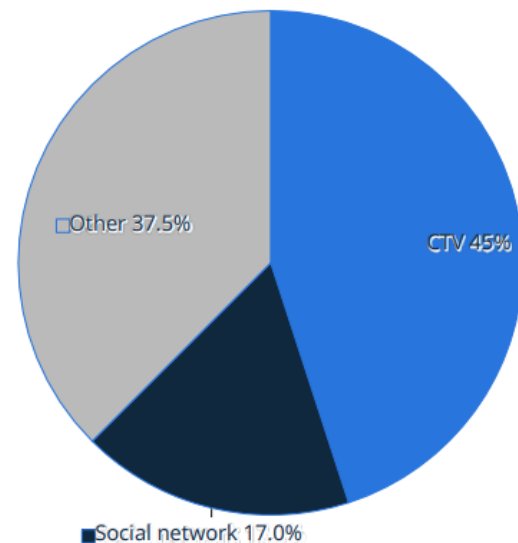
## OPPORTUNITIES

- Of the digital political ad spend for 2024:
  - 45% was spent toward CTV.
  - 17% was allocated to social networks.
- In the second and third weeks of September 2024:
  - Harris spent \$22.8M on Meta, and \$17.3M on Google.
  - Trump spent \$1.4M on Meta and \$6.5M on Google.

### POLITICAL AD SPENDING ON META AND GOOGLE



### DISTRIBUTION OF DIGITAL POLITICAL AD SPEND IN 2024



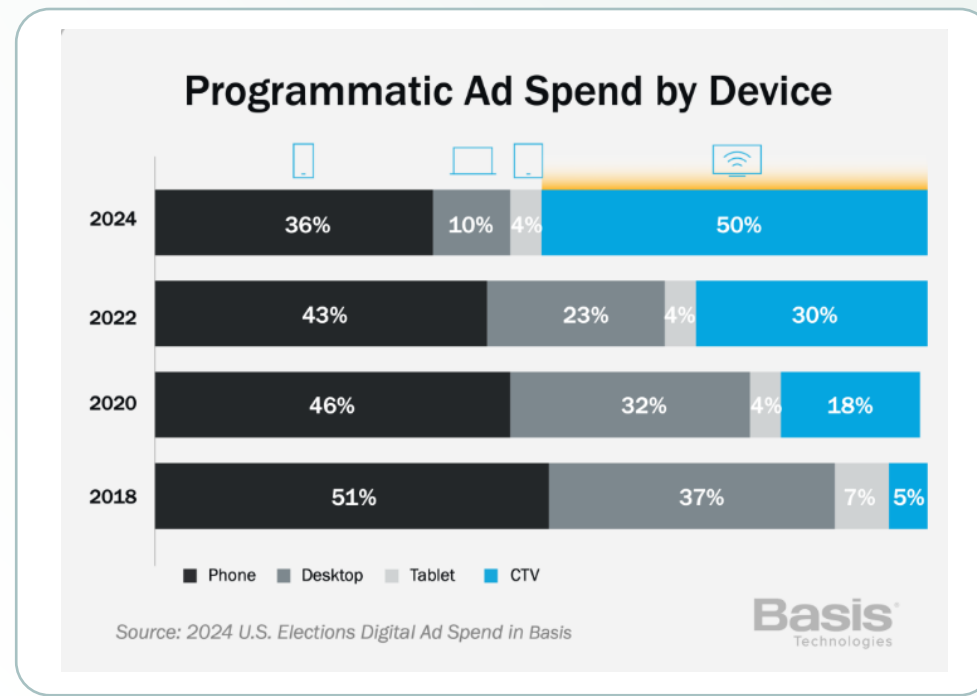
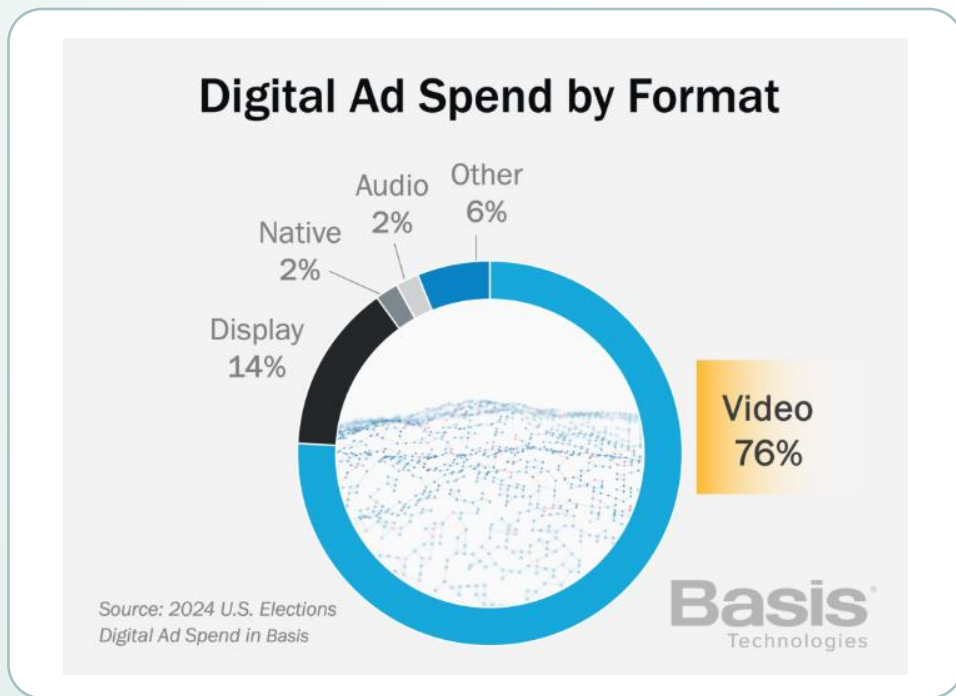
Source: Statista – 2024 Report

# Presidential Election – Ad Spend **Insights**

## OPPORTUNITIES

- Video continues to be the leader for ad formats.
- Growth in programmatic spend share is going to CTV devices, taken from budgets previously put toward desktop and mobile ads.

Source: Basis Technologies – 3/17/2025

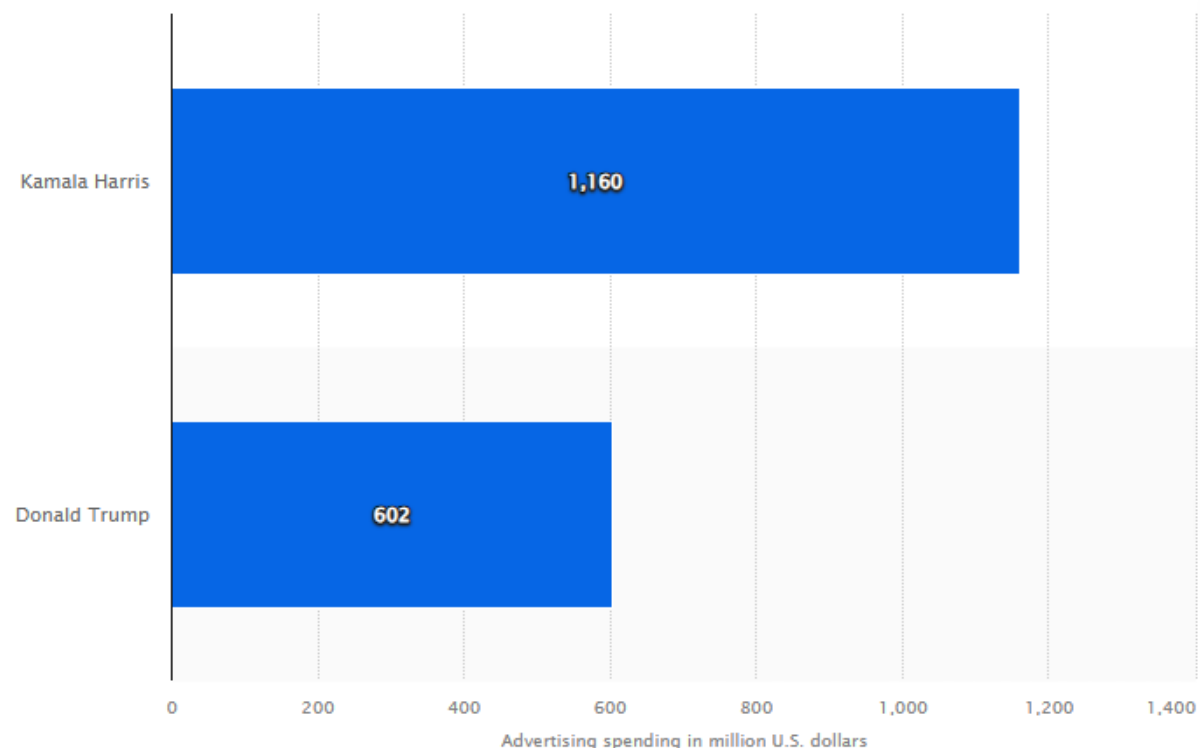


# Presidential Election – TV, Digital, and Radio **Insights**

## OPPORTUNITIES

- The distribution of ad spend in the US in 2024 was 28.1% digital media, and 71.9% traditional media.
- Harris was the top TV, digital, and radio ad spender among the 2024 presidential candidates.
  - Her campaign invested nearly \$1.2B in ads from March to September 2024.
  - Trump's campaign spent \$602M during the same period.
- Trump spent drastically less on mainstream social media platforms like Meta, while Harris focused heavily on those platforms.
- Trump's campaign emphasized X (Twitter), generating over 30M impressions on ads targeting swing state voters.

POLITICAL AD SPEND ON TV, DIGITAL, AND RADIO ADS

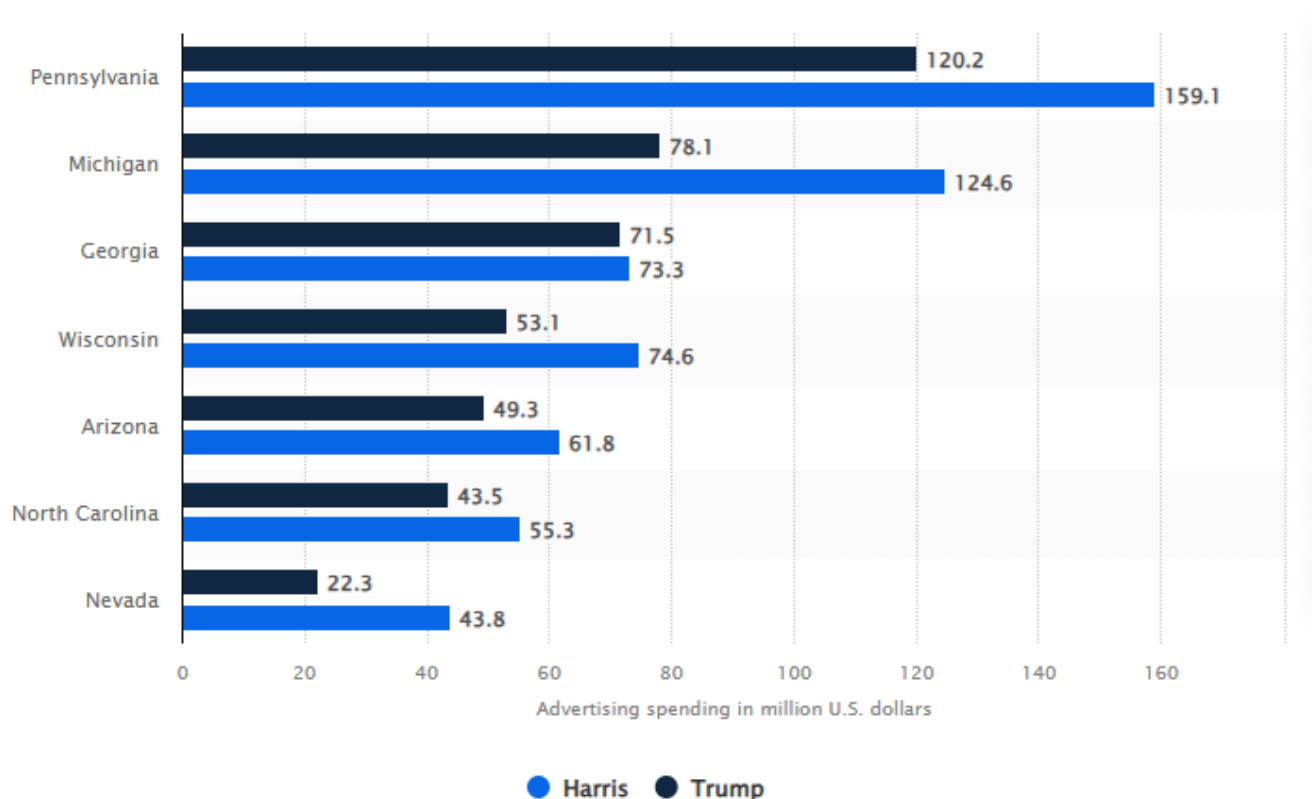


# Presidential Election – CTV Insights

## OPPORTUNITIES

- While both campaigns focused on swing states, Harris' campaign opted for blanket coverage while Trump used targeted segmentation.
- Harris utilized CTV/OTT ad spots during major sporting events and primetime shows.
- Trump emphasized Hulu, YouTube, Spotify, Roku, Paramount, and Pandora.
  - Choosing mainly programmatic advertising allowed Trump to narrow his geofenced target, as opposed to Harris using Google's location targeting.

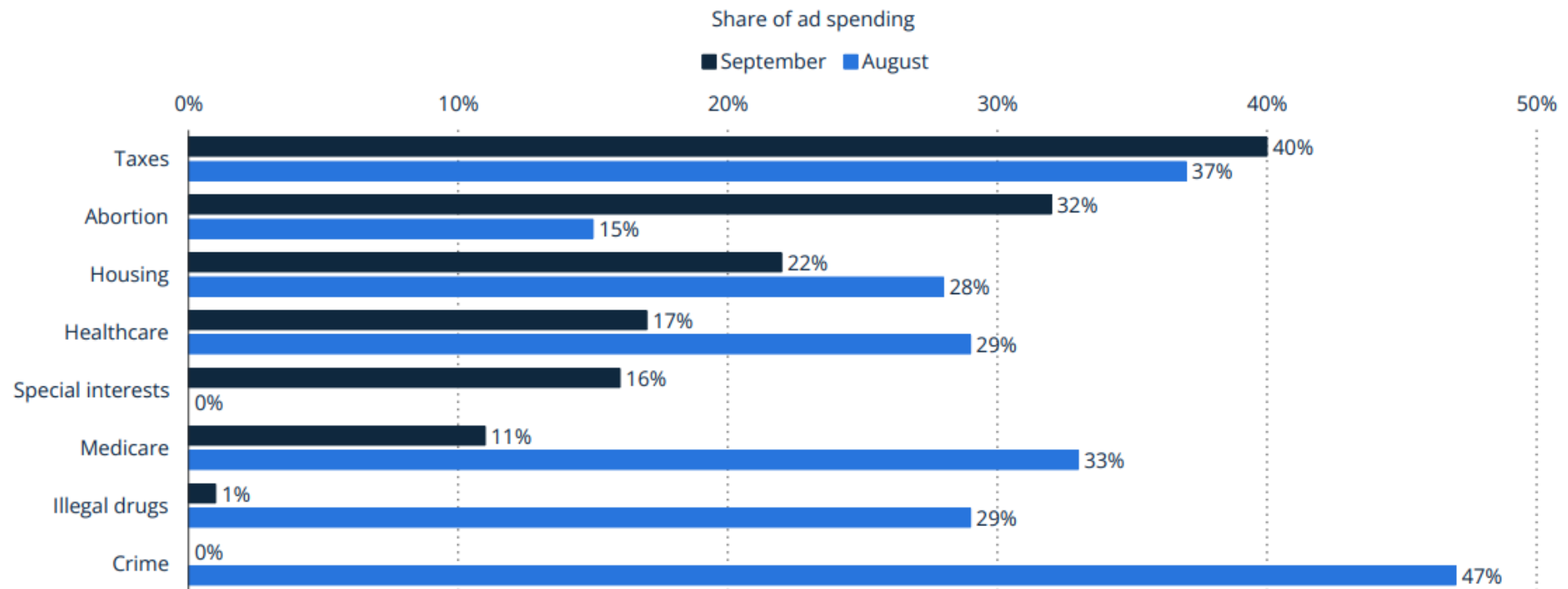
2024 TV AD SPENDING FOR PRESIDENTIAL ELECTIONS IN SWING STATES



# **PRESIDENTIAL ELECTION MESSAGING THEMES**

# Presidential Election – Harris' Messaging

LEADING THEMES MENTIONED IN POLITICAL TV ADS BOUGHT BY HARRIS' CAMPAIGN

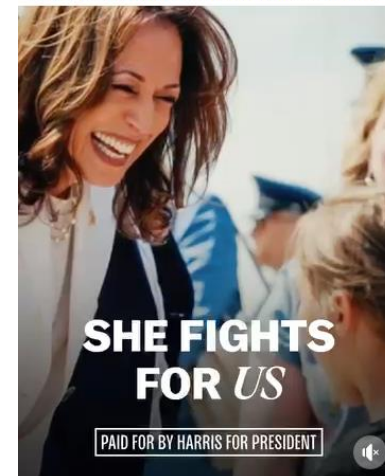
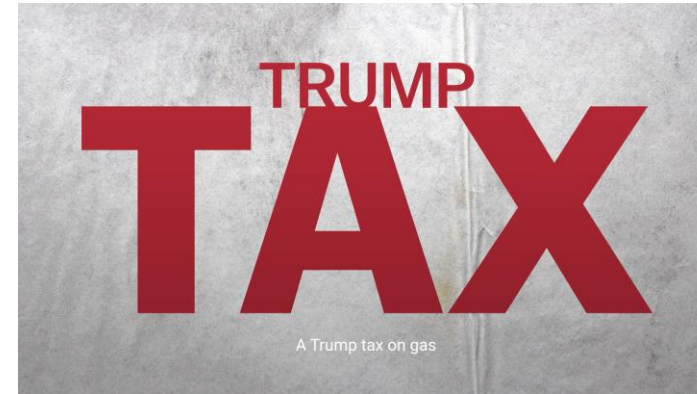




# Creative Examples – Harris' Messaging

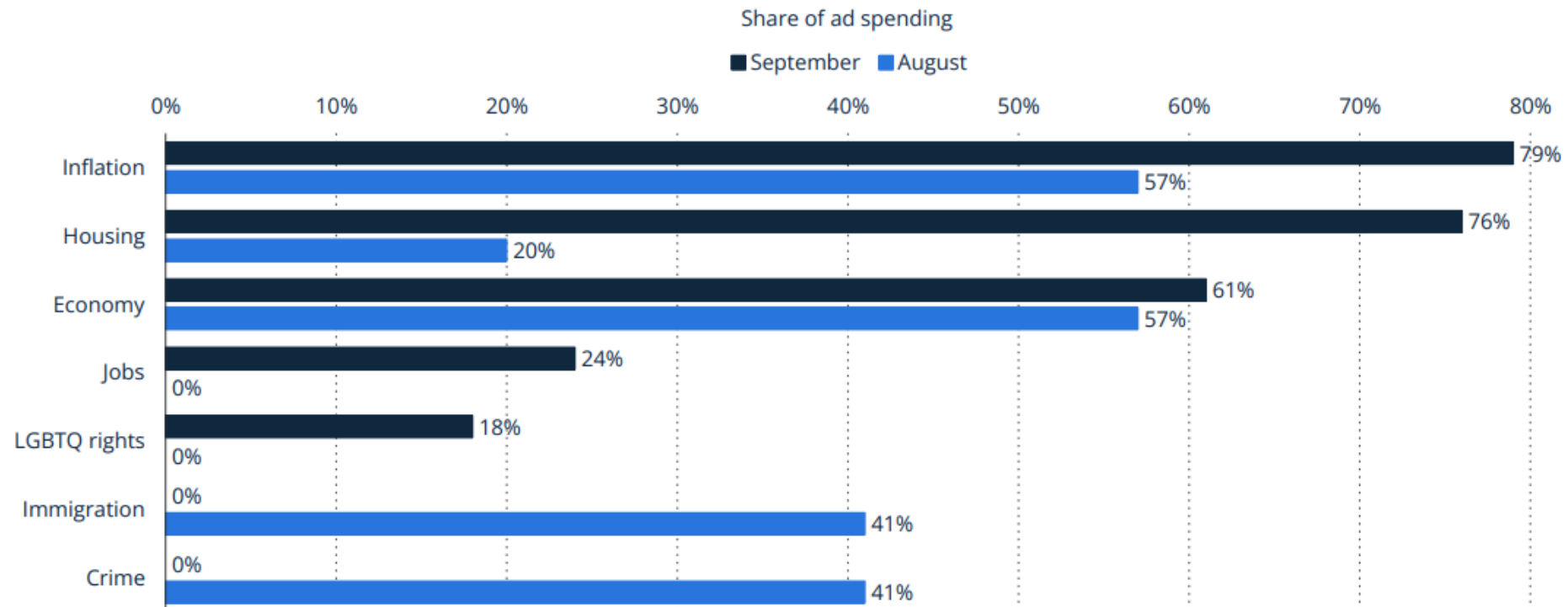
## OPPORTUNITIES

- Harris' ads focused on the economy, cultural issues, health, and women's issues.
- Harris allocated an estimated \$5.3M on Snapchat, tapping into a younger audience.
  - Example: After Taylor Swift performed in Miami, Harris created a Snapchat filter encouraging people to be "Fearless," referencing a Swift song.



# Presidential Election – Trump's Messaging

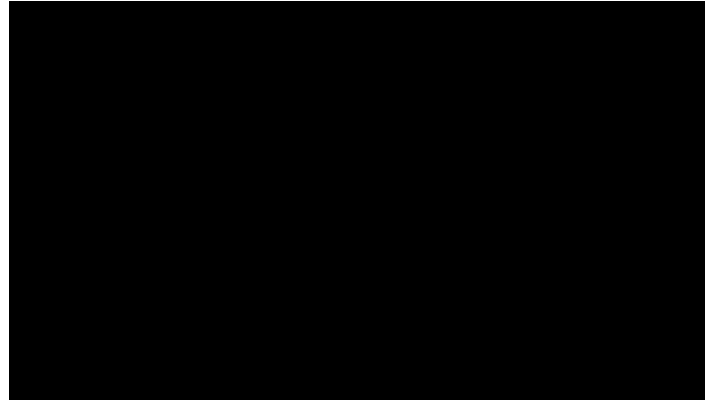
LEADING THEMES MENTIONED IN POLITICAL TV ADS BOUGHT BY TRUMP'S CAMPAIGN



# Creative Examples – Trump's Messaging


## OPPORTUNITIES

- Trump's campaign especially focused on CTA ads and self-advocacy ads.
- Musk's Building America's Future PAC ran 50 ads from April-October 2024 that mentioned a presidential candidate.
- The Future Coalition PAC publicized ads focusing on foreign policy, with primarily negative messaging.



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Kamala Harris stands unequivocally with Israel.  
She always has. And she always will.




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Donald Trump was right: Illegal aliens flocking to the United States are bringing drugs and crime. Some are even rapists.



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Democrats are focused on all the wrong things. And it shows.



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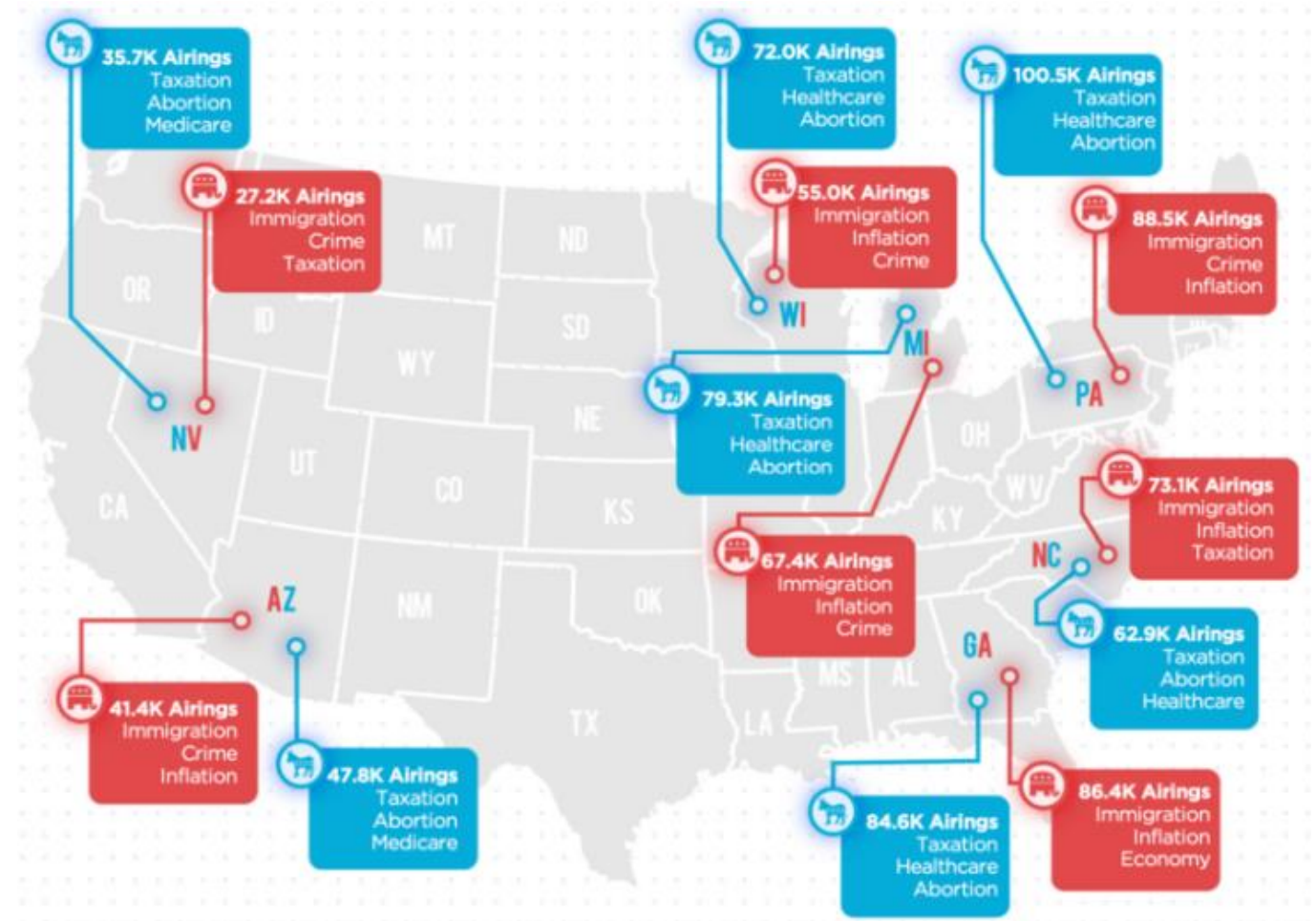


# Presidential Election – Swing States' Messaging

## OPPORTUNITIES

- Harris focused the bulk of her ad spend on Google, Facebook, and Instagram.
- Trump emphasized YouTube and Twitch.
  - Trump collaborated with several influencers from these platforms, including Logan Paul, while Harris created content with podcasters like Alex Cooper.

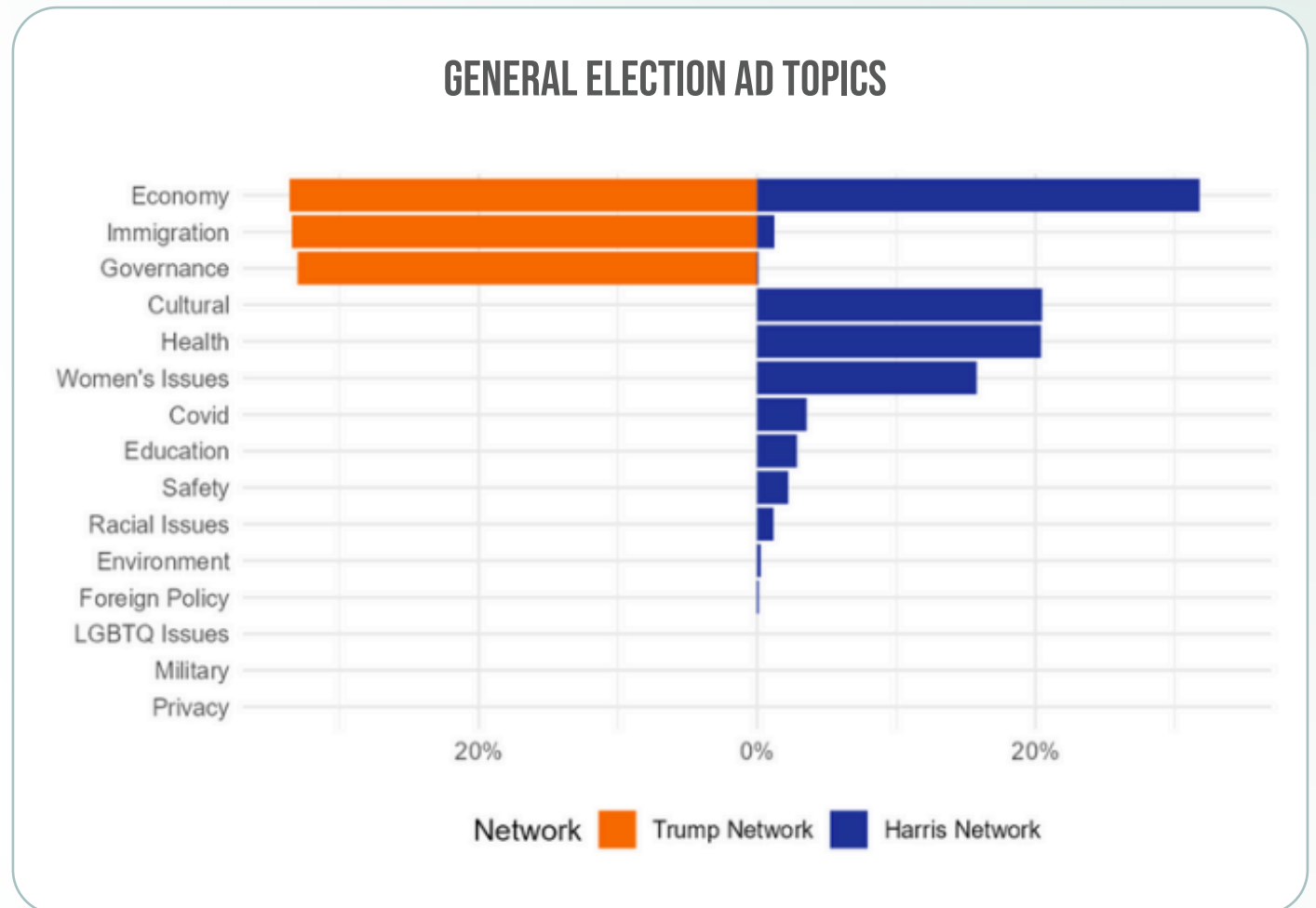
## KEY AD MESSAGING ACROSS SWING STATES



# Presidential Election – Messaging Strategy

## OPPORTUNITIES

- From September 2023 – Election Day, Trump's general election ads used "considerably less" negative language than Harris'.
  - However, more than \$6M in heavily-negative ads on Meta aimed at undercutting Harris were funded by PACs backed by Elon Musk.
  - Common messaging themes from these PACs included: Economy, illegal immigration, and messages aimed at "eroding Democratic support."
- Trump's own ads were less likely to mention specific policies, but when they did, they focused on economy, immigration, and election integrity.
- Harris' ads focused on fundraising, while Trump's ads focused on urging people to vote.



# **NEWS SOURCE VIEWERSHIP**

# News Sources – October 2024 Viewership

## OPPORTUNITIES

- During October 2024:
  - Fox News had 2.7M primetime viewers, with 361K being part of the 25-54 age demographic.
  - CNN had 571K total primetime viewers, with 115K being between ages 25-54.
  - Fox News' "The Five" was the most-watched program in total viewers, while Jesse Watters' "Primetime" was the first in the 25-54 demographic (see next slide).

### OCTOBER 2024 CABLE NEWS RATINGS

PRIMETIME	Fox News	MSNBC	CNN
• Total Viewers:	2,751,000	1,390,000	830,000
• A25-54:	359,000	160,000	175,000

TOTAL DAY	Fox News	MSNBC	CNN
• Total Viewers:	1,623,000	903,000	532,000
• A25-54:	212,000	97,000	100,000

# News Sources – October 2024 Viewership

## The Top 15 Among Total Viewers

1. The Five — Fox News (3,616,000)
2. Jesse Watters Primetime — Fox News (3,526,000)
3. Hannity — Fox News (2,971,000)
4. Gutfeld! — Fox News (2,938,000)
5. Special Report with **Bret Baier** — Fox News (2,866,000)
6. The Ingraham Angle — Fox News (2,838,000)
7. Outnumbered — Fox News (2,073,000)
8. The Faulkner Focus — Fox News (1,935,000)
9. America's Newsroom — Fox News (1,849,000)
10. America Reports — Fox News (1,831,000)
11. The Story with **Martha MacCallum** — Fox News (1,806,000)
12. Your World with **Neil Cavuto** — Fox News (1,780,000)
13. Deadline: White House with **Nicole Wallace** at 5 p.m. — MSNBC (1,742,000)
14. Last Word with **Lawrence O'Donnell** — MSNBC (1,695,000)
15. Fox News @Night — Fox News (1,673,000)

## The Top 15 Among Adults 25-54

1. Jesse Watters Primetime — Fox News (454,000)
2. Gutfeld! — Fox News (398,000)
3. Hannity — Fox News (393,000)
4. The Five — Fox News (364,000)
5. The Ingraham Angle — Fox News (334,000)
6. Special Report with Bret Baier — Fox News (319,000)
7. Fox News at Night — Fox News (260,000)
8. Outnumbered — Fox News (242,000)
9. The Faulkner Focus — Fox News (231,000)
10. America Reports — Fox News (227,000)
11. Your World with Neil Cavuto — Fox News (214,000)
12. The Story with Martha MacCallum — Fox News (213,000)
13. America's Newsroom — Fox News (211,000)
14. All In with Chris Hayes/Inside with Jen Psaki — MSNBC (193,000)
15. Anderson Cooper 360 — CNN (186,000)



# | News Sources – Viewership

## OPPORTUNITIES

- Spotify named Joe Rogan their top podcaster in 2024.
- According to a report from EMarketer, *The Joe Rogan Experience's* audience demographics are:
  - Predominantly male (80%)
  - Young adults ages 18-34 (56%)
  - Split evenly across parties, with 35% identifying as Independent, 32% as Republican, and 27% as Democrat.
    - However, a late October 2024 poll found that 54% of listeners had leaned toward Trump in the election.
- *The Tucker Carlson Show* ranked #1 for Apple Podcasts in 2024.



# | Top 10 Podcasts – Q4 2024 Viewership

## OPPORTUNITIES

- During Q4 2024, *Pod Save America* debuted in the Top 10.
- Alex Cooper hosted Kamala Harris on *Call Her Daddy* October 2024
- Joe Rogan hosted Donald Trump on the *Joe Rogan Experience* October 2024
- Theo Von hosted Donald Trump on *This Past Weekend* August 2024 and hosted JD Vance on his podcast in October 2024.
- In the Top 50, *The Ben Shapiro Show* jumped from #22 to #14, and *The Megyn Kelly Show* moved from #50 to #27.

## TOP 10 PODCASTS IN THE U.S. FOR Q4 2024

	TITLE	PRODUCER
1	<b>The Joe Rogan Experience</b>	<i>Joe Rogan</i>
2	<b>Crime Junkie</b>	<i>audiochuck</i>
3	<b>The Daily</b>	<i>The New York Times</i>
4	<b>Call Her Daddy</b>	<i>Alex Cooper</i>
5	<b>This Past Weekend w/ Theo Von</b>	<i>Theo Von</i>
6	<b>Dateline NBC</b>	<i>NBC News</i>
7	<b>SmartLess</b>	<i>Jason Bateman, Sean Hayes, Will Arnett</i>
8	<b>Stuff You Should Know</b>	<i>iHeartPodcasts</i>
9	<b>Morbid</b>	<i>Morbid Network   Wondery</i>
10	<b>Pod Save America</b>	<i>Crooked Media</i>

# Thank you!



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