

Political Update - 2024

SEPTEMBER 2024

Projected Political Media Spending – All Races

	2024 Projected Spend	2022 Actual Spend
Total Spend	\$11 billion	\$9.67 billion
Broadcast TV	\$5.0 billion	\$4.95 billion
Cable & Satellite	\$1.5 billion	\$1.54 billion
CTV	\$1.8 billion	\$1.44 billion
Digital (Facebook & Google)	\$1.6 billion	\$1.44 billion
Radio	\$300 million	\$270 million

Source: Kantar

→ Spending is likely to reach **\$11 billion** (higher than the 2020 Presidential and 2022 Midterm elections)

→ Recent estimates suggest spending may reach **\$12 billion!**

→ Video still dominates political investment.

Where Will it be Spent?

\$11 Billion is the projected spend for the 2024 Election cycle
(up from ~\$9 Billion in 2020 and 2022)

Presidential races

highly contested states: AZ, GA, PA, MI, NC, NV, WI

Senate races

with high expected spend: AZ, OH, MT, FL, PA, MI, NV, WI, TX

Gubernatorial races

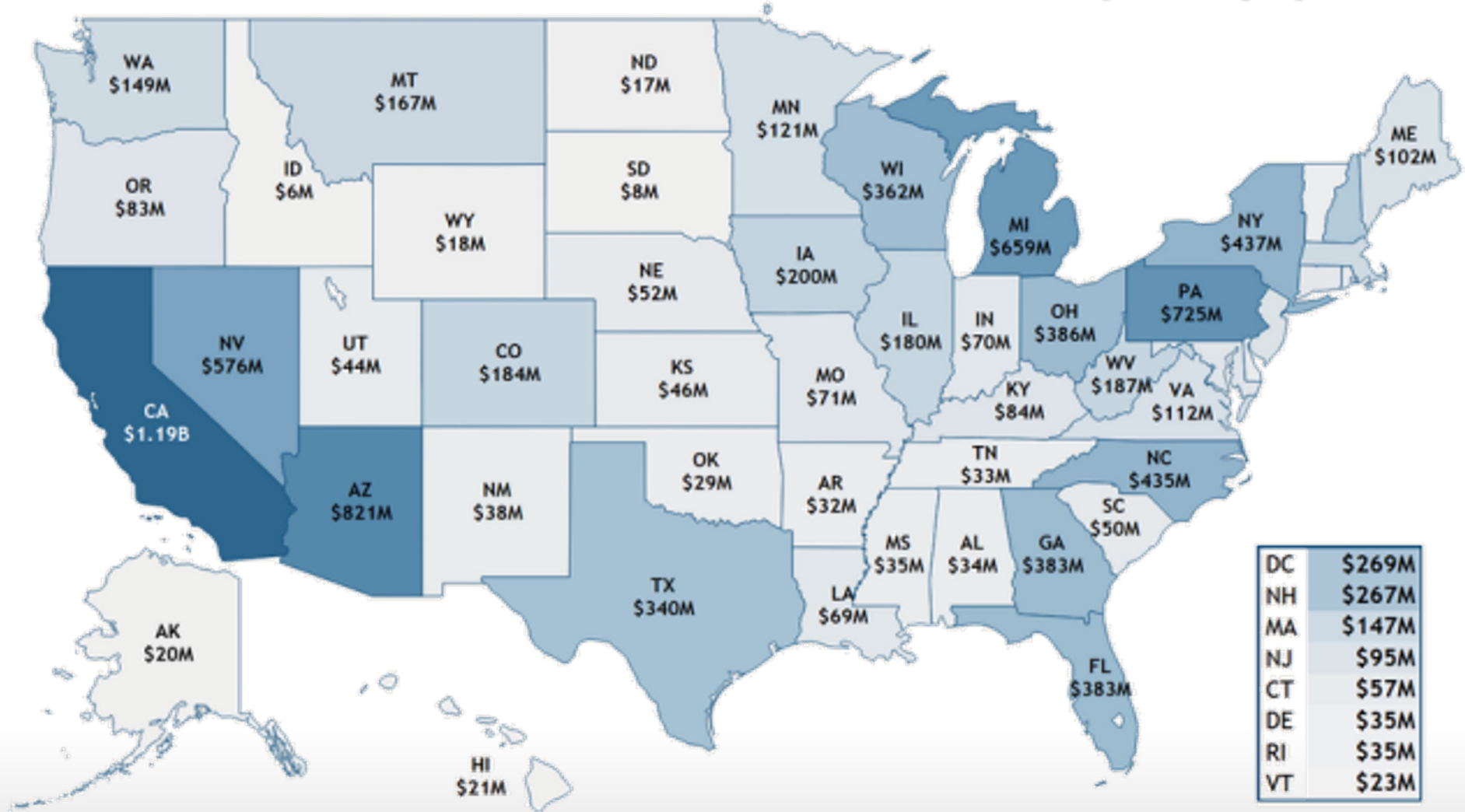
with high expected spend: MT, MO, NC, NH, VT



Count of total competitive races by state:

AZ (2)	NC (4)
CA (6)	NE (1)
CO (2)	NJ (1)
CT (1)	NM (1)
IA (1)	NV (1)
IL (1)	NY (6)
IN (1)	OH (3)
ME (1)	OR (1)
MI (3)	PA (3)
MN (1)	VA (1)
MT (1)	WA (2)

2024 Projected Spending by State



Premium Pricing Windows by State/ Market

(09/2023)

State	"Hot Markets"	*Primary Window	**General Election Window
Nevada	Las Vegas	12/23 (2023) - 2/6	9/6 - 11/5
Michigan	Detroit, Grand Rapids	1/13 - 2/27	
North Carolina	Raleigh, Charlotte, Greenville, Greensboro	1/20 - 3/5	
Texas	Houston, Dallas, Austin, San Antonio	1/20 - 3/5	
Vermont	Burlington	1/20 - 3/5	
Georgia	Atlanta	1/27 - 3/12	
Arizona	Phoenix	2/3 - 3/19	
Florida	Miami, Orlando, Tampa, Jacksonville	2/3 - 3/19	
Ohio	Cincinnati, Cleveland, Columbus	2/3 - 3/19	
New York	New York	2/17 - 4/2	
Wisconsin	Milwaukee, Green Bay, Madison	2/17 - 4/2	
Pennsylvania	Philadelphia, Pittsburgh	3/9 - 4/23	
Maryland	Baltimore	3/30 - 5/14	
Montana	Billings	4/20 - 6/4	
Missouri	St. Louis	6/22 - 8/6	

*Primary - Window opens 45 days prior to election

**General Election - Window opens 60 days prior to election



Key / Contested 2024 Primaries

February 6 - NV

February 27 - MI

March 5 "Super Tuesday" (15 states) - AL, AK, AR, CA, CO, ME, MA, MN, NC, OK, TN, TX, UT, VT, VA

March 12 - GA, MS, WA

March 19 - AZ, FL, IL, KS, OH

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April 23 - PA

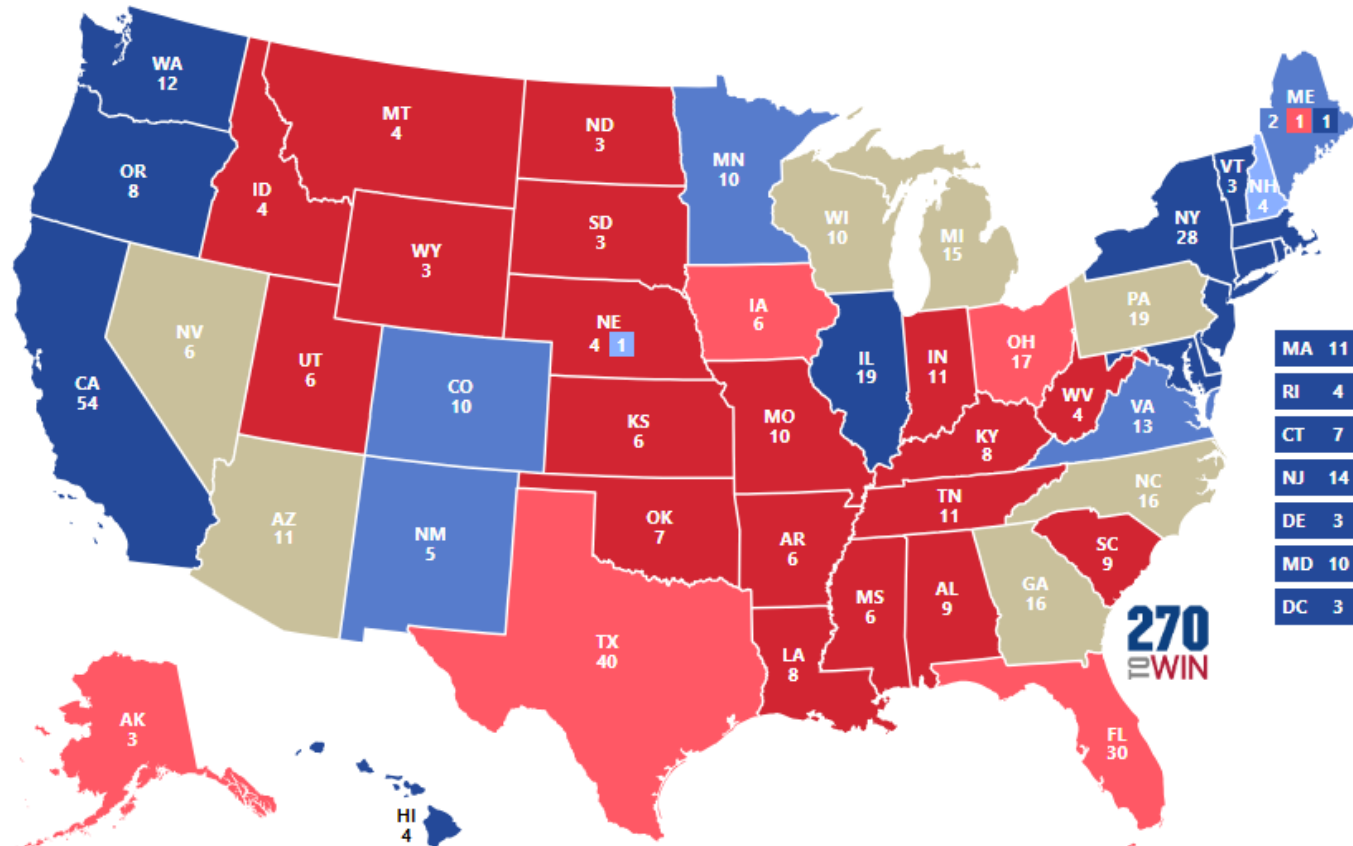
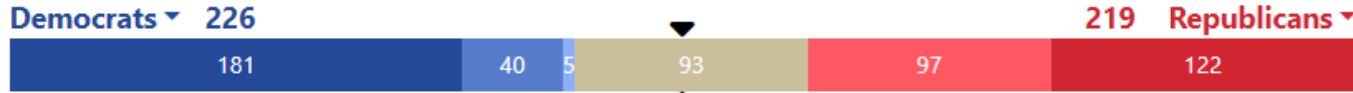
May 14 - MD, NE, WV

November 5
General Election
(Presidential)



2024 Presidential Consensus Electoral Map

Highly contested states: AZ, GA, MI, PA, NC, NV, WI



Map Updated: Sep. 6, 2024 at 22:08 UTC (6:08 PM EDT)

Source: 270towin.com (updated 09.2024)

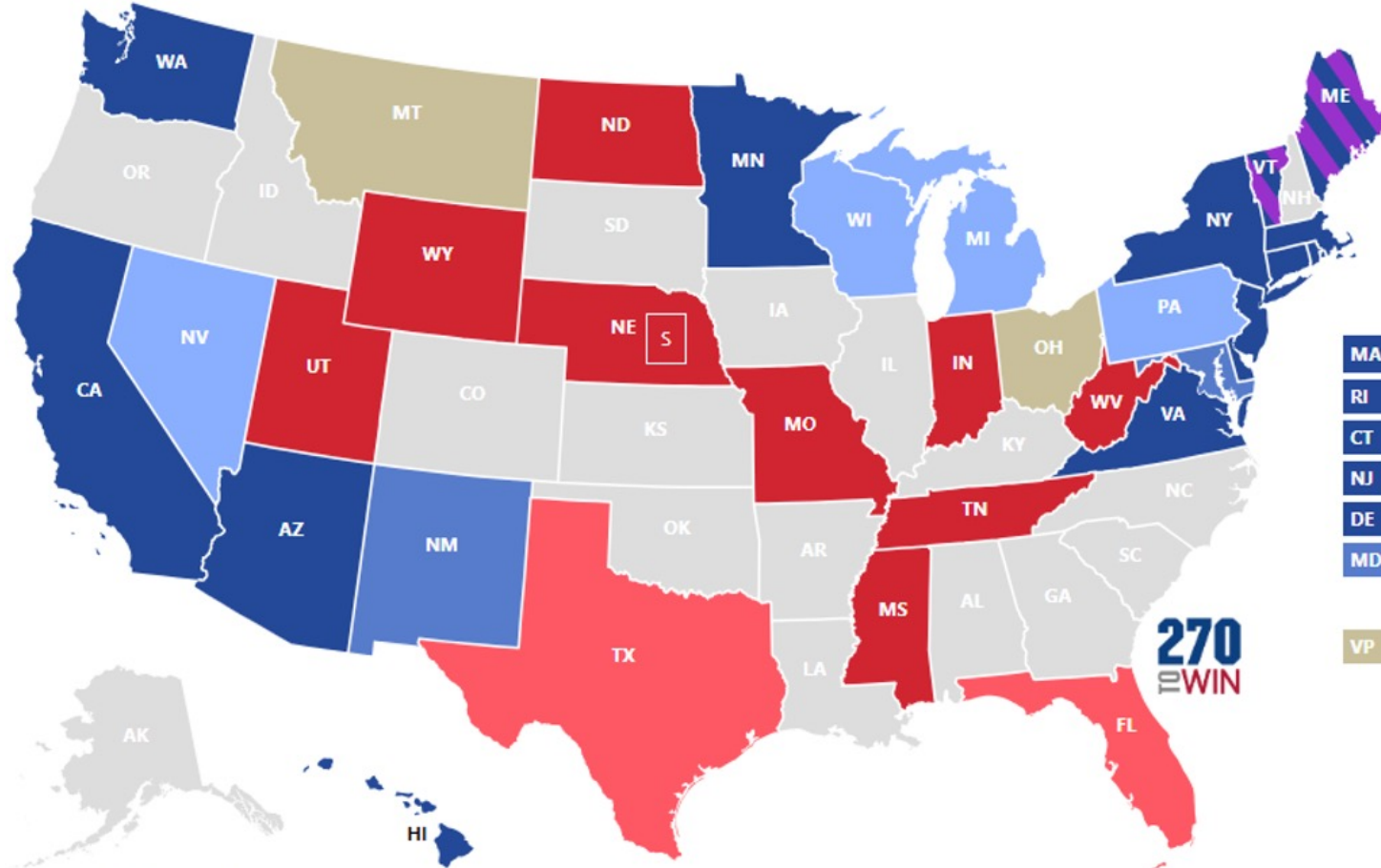


This map reflects the consensus forecast for the 2024 presidential election. It is a composite of ratings by several forecasters. Only seats rated **safe by all** are shown as **safe** for the incumbent party.



As a result of Census apportionment, some states have a different number of electoral votes in 2024.

2024 Senate Election Map



Map Updated: Sep. 8, 2024 at 10:54 UTC (6:54 AM EDT)

Source: 270towin.com (updated 09.2024)

34 Senate races

Most contested:
OH, MT

Others in play:
AZ, FL, PA, MI, NV,
WI, TX

2024 Gubernatorial Election Map

Democrats 23

26 Republicans

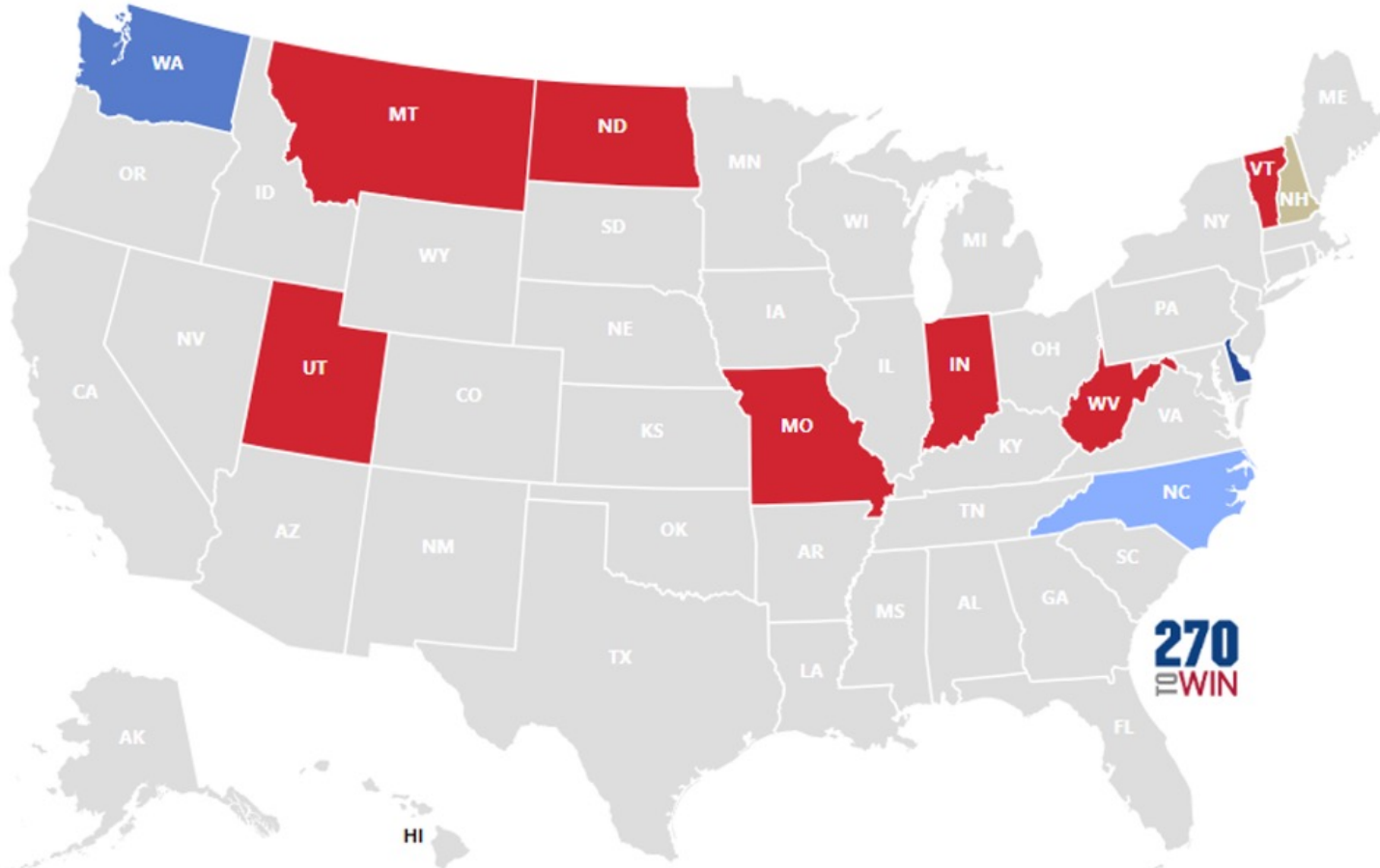
20 no 2024 election

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7

no 2024 election

19

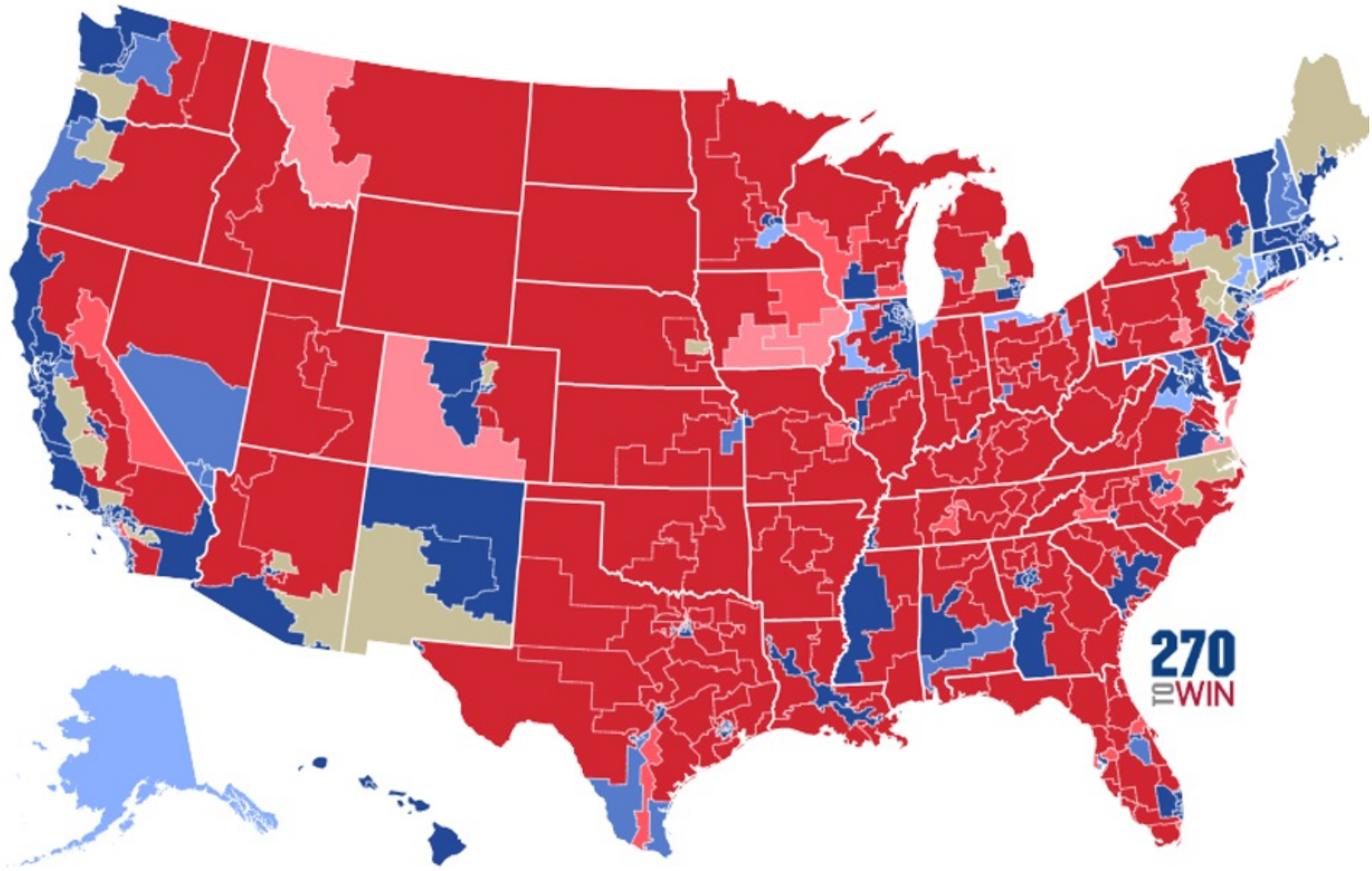
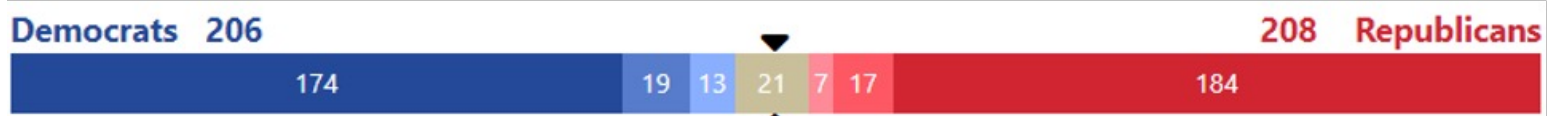


Map Updated: Aug. 28, 2024 at 12:36 UTC (8:36 AM EDT)

11 Gubernatorial races

Most contested:
MT, MO, NC, NH, VT

2024 House of Representatives Election Map



Map Updated: Sep. 7, 2024 at 21:29 UTC (5:29 PM EDT)

Source: 270towin.com (updated 09.2024)

All 435 House seats are up for election.

Very few are truly up for grabs. 25 (less than 6%), are identified as toss-up.

410, (over 80%) are completely safe.

2024 Presidential Primary Calendar

Date	State	Democratic	Republican
January 15	Iowa		Caucus
February 3	South Carolina	Primary	
February 6	Nevada	Primary	
February 8	Nevada		Caucus
February 24	South Carolina		Primary
February 27	Michigan	Primary	Primary
March 2	Idaho		Caucus
March 4	North Dakota		Caucus
March 5	Alabama ¹	Primary	Primary
	Alaska		Primary
	American Samoa	Caucus	
	Arkansas ¹	Primary	Primary
	California ¹	Primary	Primary
	Colorado	Primary	Primary
	Maine	Primary	Primary
	Massachusetts	Primary	Primary
	Minnesota	Primary	Primary
	North Carolina ¹	Primary	Primary
	Oklahoma	Primary	Primary
	Tennessee	Primary	Primary
Texas ¹	Primary	Primary	

Date	State	Democratic	Republican
	Utah	Primary	Primary
	Vermont	Primary	Primary
	Virginia	Primary	Primary
March 12	Democrats Abroad	Primary	
	Georgia	Primary	Primary
	Hawaii		Caucus
	Mississippi ¹	Primary	Primary
	Northern Mariana	Primary	
	Washington	Primary	Primary
March 17	Puerto Rico	Primary	
March 19	Arizona	Primary	Primary
	Florida	Primary	Primary
	Illinois ¹	Primary	Primary
	Kansas	Primary	Primary
	Ohio ¹	Primary	Primary
March 23	Louisiana	Primary	Primary
April 2	Delaware	Primary	Primary
	New York	Primary	Primary
	Rhode Island	Primary	Primary
	Wisconsin	Primary	Primary

2024 Presidential Primary Calendar (continued)

Date	State	Democratic	Republican
April 6	Alaska	Primary	
	Hawaii	Caucus	
	North Dakota	Primary	
April 13	Wyoming	Caucus	
April 23	Pennsylvania ¹	Primary	Primary
April 30	Connecticut	Primary	Primary
May 7	Indiana ¹	Primary	Primary
May 14	Maryland ¹	Primary	Primary
	Nebraska ¹	Primary	Primary
	West Virginia ¹	Primary	Primary
May 18	Idaho	Caucus	
May 21	Kentucky ¹	Primary	Primary
	Oregon ¹	Primary	Primary
June 4	District of Columbia	Primary	Primary
	Montana ¹	Primary	Primary
	New Jersey ¹	Primary	Primary
	New Mexico ¹	Primary	Primary
	South Dakota ¹	Primary	Primary
June 8	Virgin Islands	Caucus	
July 15 - 18	Republican Convention (Milwaukee, WI)		
August 19 - 22	Democratic Convention (Chicago, IL)		

November 5	2024 Presidential Election
December 17	Electors Cast Their Votes

Date Unknown: These locations will be added to the calendar once a specific date can be projected. Where a (month) is shown, that represents our best guess of when the contest will be held.

- American Samoa (March)
- Guam (May) | Guam (March)
- Iowa (March)
- Missouri (March) | Missouri (March)
- New Hampshire (January) | New Hampshire (January)
- Northern Mariana (March)
- Puerto Rico (March)
- Virgin Islands (March)
- Wyoming (March)

2024 State Race Primary Calendar

Date	State	Elections
March 5	Alabama	D R Primaries ^{1,2}
	Arkansas	D R Primaries ^{1,2}
	California	ALL Top 2 Primaries ¹
	North Carolina	D R Primaries ^{1,3}
	Texas	D R Primaries ^{1,2}
March 12	Mississippi	D R Primaries ^{1,2}
March 19	Illinois	D R Primaries ¹
	Ohio	D R Primaries ¹
April 2	Alabama	D R Runoffs ²
	Arkansas	D R Runoffs ²
	Mississippi	D R Runoffs ²
April 23	Pennsylvania	D R Primaries ¹
May 7	Indiana	D R Primaries ¹

May 14	Maryland	D R Primaries ¹
	Nebraska	D R Primaries ¹
	West Virginia	D R Primaries ¹
May 21	Georgia	D R Primaries ²
	Idaho	D R Primaries
	Kentucky	D R Primaries ¹
	Oregon	D R Primaries ¹
May 28	Texas	D R Runoffs ²
June 4	Iowa	D R Primaries
	Montana	D R Primaries ¹
	New Jersey	D R Primaries ¹
	New Mexico	D R Primaries ¹
	South Dakota	D R Primaries ^{1,4}
June 11	Maine	D R Primaries ⁶
	Nevada	D R Primaries
	North Dakota	D R Primaries
	South Carolina	D R Primaries ²

This includes elections for U.S. House of Representatives, U.S. Senate and Governor, where applicable.

→ It also includes primaries for legislature in most states.

→ Primaries for municipal elections (e.g., mayor) and special elections may occur on other dates and are not reflected on this calendar.

Source: Primary calendar data is from [NCSL](#) and [270toWin.com](#) research

2024 State Race Primary Calendar *(continued)*

Date	State	Elections
June 18	Virginia	D R Primaries
June 19	Georgia	D R Runoffs ²
June 25	Colorado	D R Primaries
	New York	D R Primaries
	Oklahoma	D R Primaries ²
	South Carolina	D R Runoffs ²
	Utah	D R Primaries
August 1	Tennessee	D R Primaries
August 6	Arizona	D R Primaries
	Kansas	D R Primaries
	Michigan	D R Primaries
	Missouri	D R Primaries
	Washington	ALL Top 2 Primaries

August 10	Hawaii	D R Primaries
August 13	Connecticut	D R Primaries
	Minnesota	D R Primaries
	South Dakota	D R Runoffs ⁴
	Vermont	D R Primaries
	Wisconsin	D R Primaries
August 20	Alaska	ALL Top 4 Primaries
	Florida	D R Primaries
	Wyoming	D R Primaries
August 27	Oklahoma	D R Runoffs ²
September 3	Delaware	D R Primaries
September 10	New Hampshire	D R Primaries
	Rhode Island	D R Primaries
September 17	Massachusetts	D R Primaries
November 5	Louisiana	ALL Hybrid Primaries ⁵
	National	ALL General Election
December 10	Louisiana	ALL Runoffs ⁵

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→ Primaries for municipal elections (e.g., mayor) and special elections may occur on other dates and are not reflected on this calendar.

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Preparing for the Onslaught

The volume of political advertising will impact virtually all marketers' plans in 2024.

Because most political ads are must run and because issue ads command such a high price premium, there will be less inventory available for other advertisers.



Additionally, the vicious nature of our elections presents a significant distraction for voters and consumers – it will be hard to divert attention away from politics, making it more challenging for marketers to win share of mind.

OUR BEST PRACTICES

Book early



Daypart mixes should be adjusted to reduce weight in 'news' dayparts



Look for alternatives to TV in key weeks and competitive markets



Be flexible on pre-emptions



Expect cost inflation versus 2023



VOTE!!

Thank you