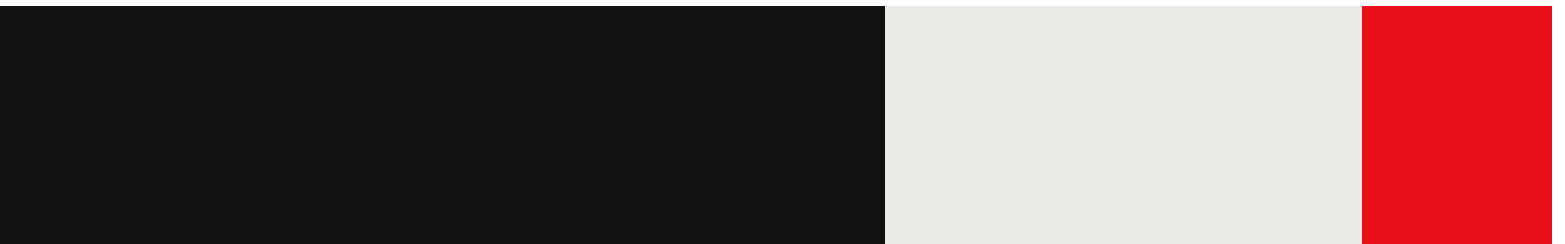


How programmatic political ads will impact the ad ecosystem from CTV to social media and more

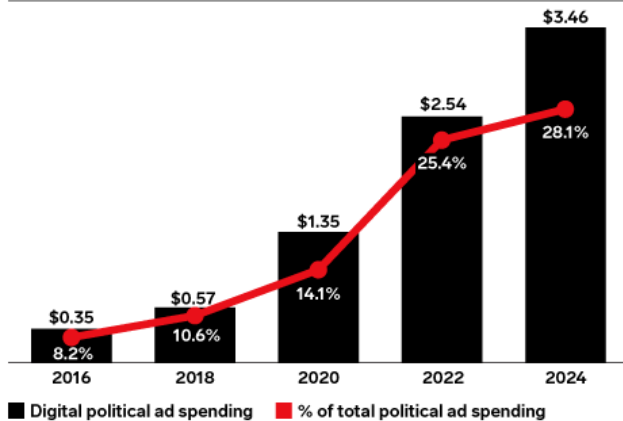
Article



With its shift to digital, political advertising is increasingly [programmatic](#). US digital political ad spend will grow by 156.3% this year over 2020, the last presidential election year. That growth outpaces the 28.7% growth overall US political ad spend will see, as noted in our [US Political Ad Spending Forecast 2024](#) report.

US Digital Political Ad Spending, 2016-2024

billions and % of total political ad spending



Note: 2020-2024 growth=156.3%; includes advertising related to federal, state, or local politics, including elections and lobbying activities; includes advertising directly related to legislative and regulatory issues

Source: Insider Intelligence | eMarketer Forecast, Dec 2023

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Insider Intelligence | eMarketer

Political advertising's move toward programmatic has implications for all advertisers.

Because political ad spend is starting earlier in the election season and is increasing so much, it will impact other advertisers more and more. "If as a [non-political] advertiser, you said, 'I'm just going to close my eyes and wake me up when politics is over,' you're not waking up," said Tyler Goldberg, director of political strategy at Assembly Global.

Despite rapid growth, digital's share of political ad spend still lags behind the overall US ad market.

- Of the \$12.32 billion we project in US total political ad spend this year, 28.1% will go to digital.
- Digital will account for 77.7% of total media ad spend, per our forecast.
- With most digital ad spend (around 90%) going toward programmatic formats, political ad spend's move to digital is a move to programmatic.

Programmatic political ad spend is lagging the overall ad market because of a lack of transparency, per Goldberg. "I think that it's too easy to just chalk it up to an older electorate.

I actually think one of the leading reasons that programmatic and digital on the whole has lagged in the political field is because of the lack of required disclosures,” Goldberg said.

[Linear TV](#) stations are required to disclose political ad buys. This encourages greater political ad spend, because campaigns and political groups can see how much opponents are spending and rival them on those channels. “With political, you want to know where your opponents are. You want to know how to match these buys,” Goldberg said.

More political ad dollars are going to [connected TV \(CTV\)](#). Political advertisers tend to wait until a channel is proven before embracing it, according to our forecaster Peter Newman.

- US political CTV ad spend will be five times greater this year than in 2020, reaching \$1.56 billion, per our forecast.
- CTV will reach 12.6% of US total political ad spend, up from 2.7% in 2020.
- Some 81% of CTV ad spend goes toward programmatic, per our forecast, which means an uptick in CTV ad spend is also an uptick in programmatic.

Political ad spend is also growing on social media, though not with the same explosiveness as on CTV.

- US [social network](#) political ad spend will nearly double this year over 2020, but social as a share of digital political ad spend is shrinking, per our US Political Ad Spending Forecast 2024 report.
- This growth is influenced by political advertisers aiming for [Gen Z](#) and [millennial](#) voters, said Goldberg.
- [Meta](#) will be the biggest recipient of this spend. [TikTok](#) does not allow political ads on its platform.

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