



**2026 REPORT: POLITICAL VIDEO AD SPEND PROJECTION**

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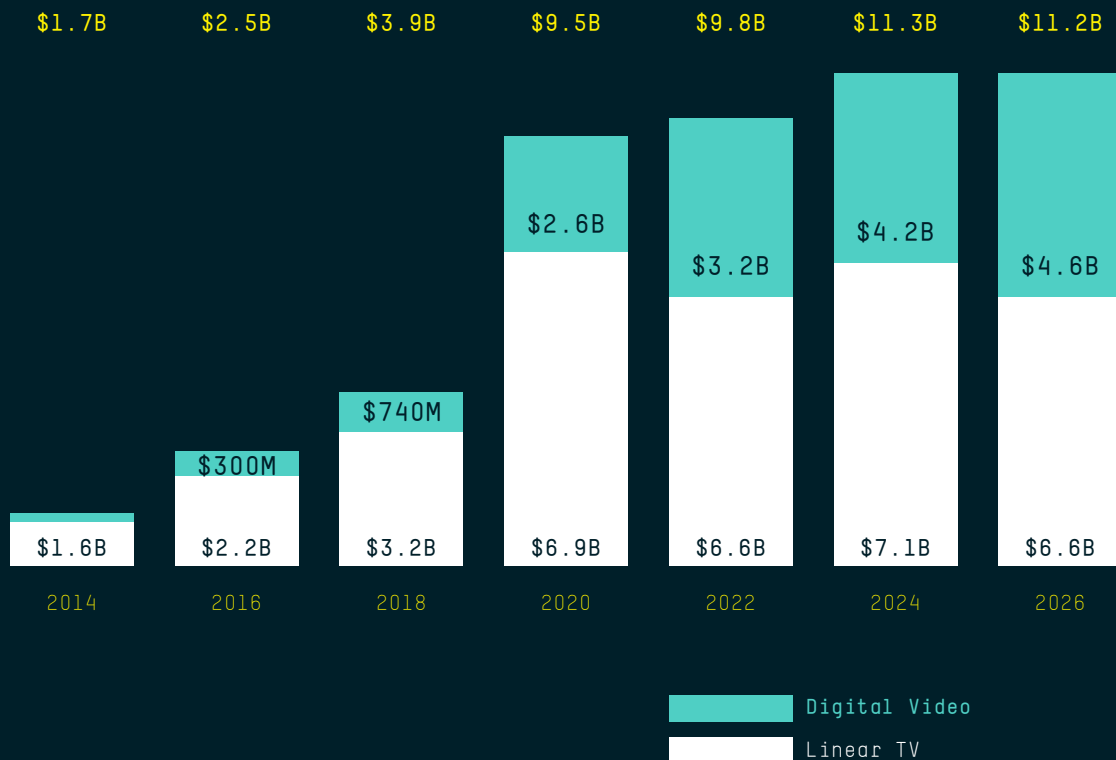
**The Streaming Decade**

# Record Midterm Video Spend Ahead

# All Eyes on the Screen: Video Ad Spend Heads for Midterm Record in 2026

Video advertising is set to dominate yet again. Despite the absence of a presidential race, political video spend for the 2026 midterms is projected to nearly equal the record-breaking levels of 2024. Total spend is expected to grow 14% over the last midterm cycle, driven largely by explosive gains in streaming. Yet, traditional broadcast still commands the lion's share of dollars, reflecting its entrenched role in political media planning. For media buyers, consultants, and sellers, this report provides essential context into how the next wave of political dollars will shape screens big and small.

**\$11B political video boom ahead  
— a 14% jump over the 2022 midterms.**



Source: AdImpact, Cross Screen Media (September 2025)

# Spending to Sway: The fight over persuadable voters isn't cheap.

Political advertisers are investing more than ever to reach the most coveted segment of the electorate: swing voters. In 2026, that means \$516 in video ads for every persuadable voter — a new high-water mark for the price of political attention.

	INDIVIDUALS	VIDEO AD \$ PER INDIVIDUAL
U.S. 18+ Population	272M	\$41
Above + Registered to Vote	233M	\$48
Above + Likely to Vote	117M	\$96
Above + Persuadable	22M	\$516

Local broadcast still commands the largest share of political video spend, but CTV now outpaces cable TV by more than 2x.

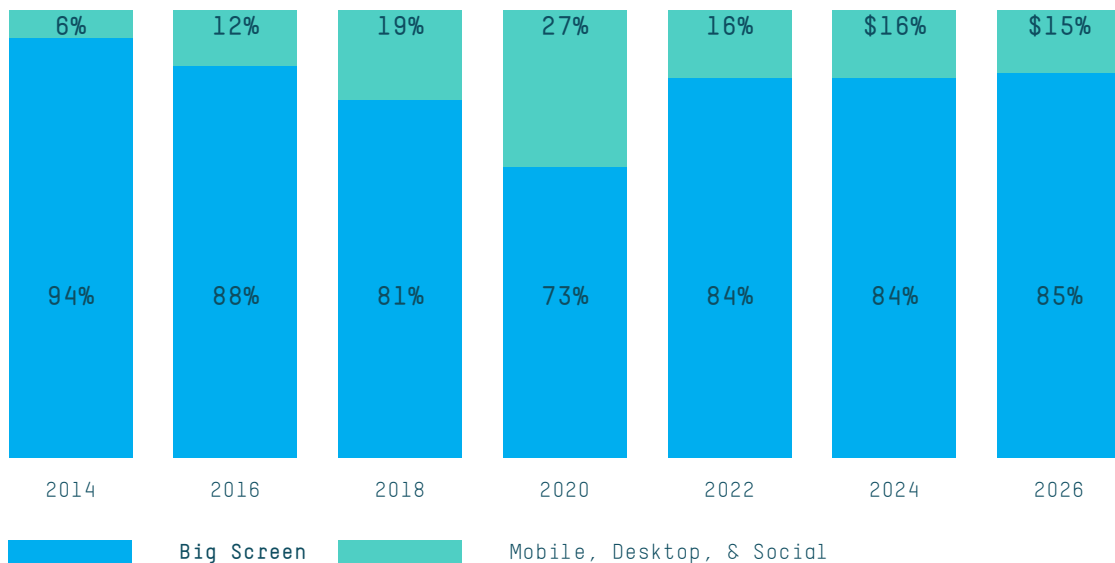
	2026	% OF TOTAL
Local Broadcast TV	\$5.3B	47%
Streaming TV (CTV)	\$2.9B	26%
Local Cable TV	\$1.3B	12%
Mobile/Desktop Video	\$1.2B	11%
Social Video	\$503M	5%

Source: AdImpact, Cross Screen Media (September 2025)

### Back to the Big Screen

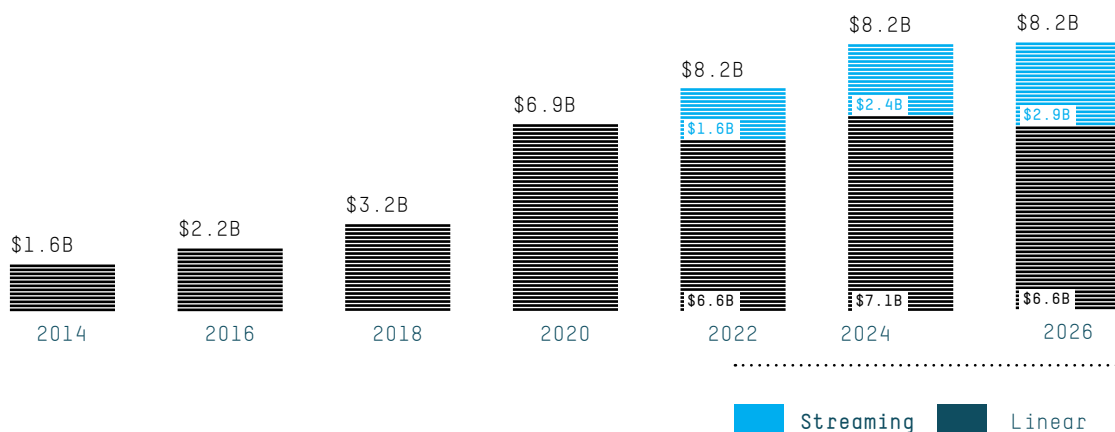
## 85% of Political Video Spend to be on the TV Screen

The rise of mobile and social in the 2010s took away ad dollars from TV. After 2020, budgets have moved back to the TV screen thanks to streaming – combining the precise targeting of digital video with the sight, sound, and storytelling of traditional television.



### Streaming Eats Linear TV's Growth

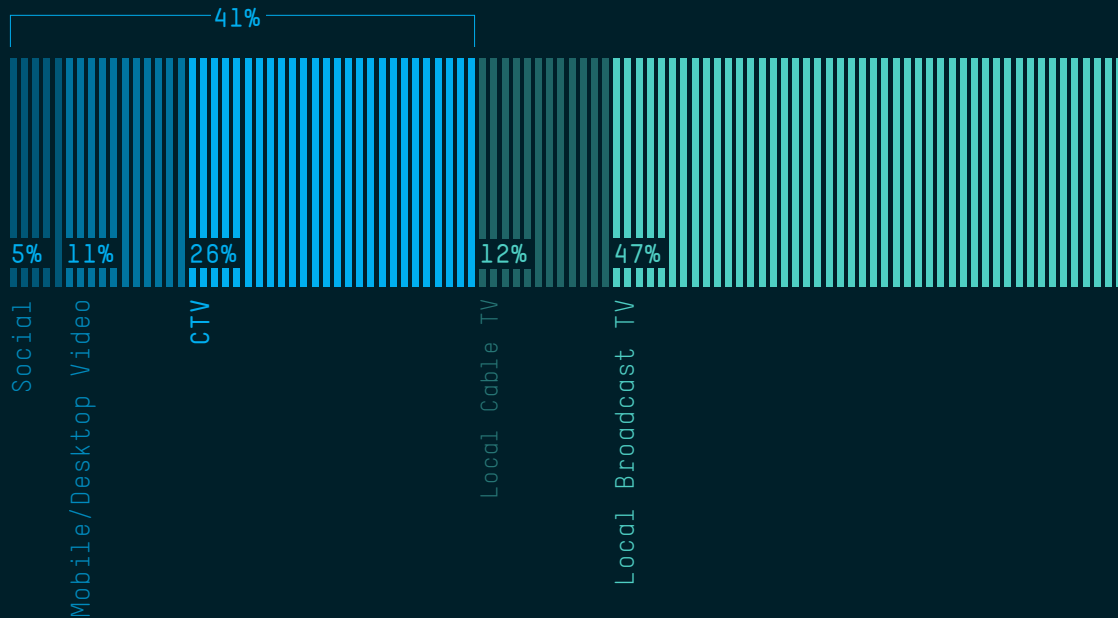
Political spend on Linear TV has been stagnant since 2020 while streaming has grown from essentially \$0 to \$2.9B in 4 cycles.



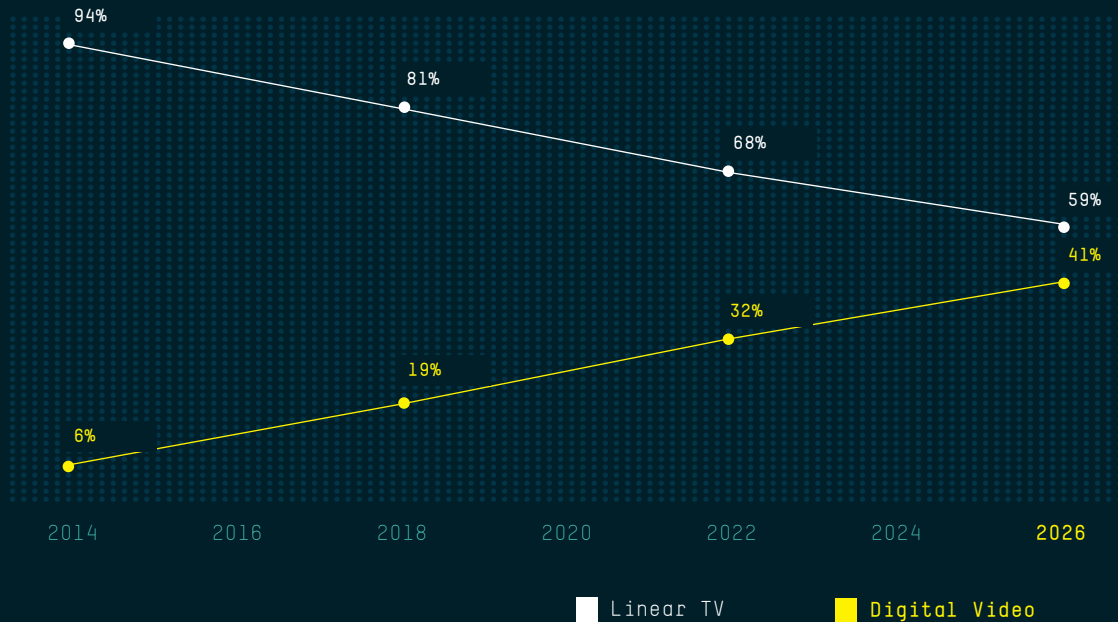
Source: AdImpact, Cross Screen Media (September 2025)

## Digital Video's Rise

Digital video will command 41% of the total video pie



## Digital video gets closer to overtaking linear TV in share of spend



Source: AdImpact, Cross Screen Media (September 2025)



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If the last cycle marked streaming’s true arrival on the big stage, then this cycle will firmly cement its position in political video for the future. Linear TV will have more spend in 2026, but all signs point to that flipping before the end of the decade.



CTV: The Engine Behind Political Ad Growth

TV Ad Segment	2022 \$	2026 \$	(+/-)	CAGR
Streaming TV (CTV)	\$1.6B	\$2.9B	^\$1.3B	^16%
Social Video	\$370M	\$503M	^\$133M	^8%
All Political Video Advertising	\$9.8B	\$11.2B	^\$1.4B	^3%
Local Broadcast TV	\$4.8B	\$5.3B	^\$480M	^2%
Mobile/Desktop Video	\$1.2B	\$1.2B	^\$27M	^1%
Local Cable TV	\$1.8B	\$1.3B	^\$510M	^8%

Politics has gone digital, but not small. Even without a presidential race, campaigns are investing record dollars to meet voters where attention lives: on the biggest screen in the house. Streaming’s rise has reshaped persuasion, blending digital precision with TV’s impact to keep the big screen at the center of political storytelling.

Source: AdImpact, Cross Screen Media (September 2025)