

LOCAL CTV AD TRENDS REPORT

2025 YEAR IN REVIEW

LOCAL MARKET

Albany, NY March ↓

- CTV 31.41%
- Local Impressions ▲ +28.56%
- Network Cable
- Local Cable
- Network Broadcast 2.39%

Total Days Online **355**

Top ads in the market



IMPRESSIONS 01/2024 - 01/2025

20,963,356

51,100+ Unique Local CTV Advertisers Analyzed
210 U.S. Television Markets Covered
Full Year 2025 Data Analysis

The Local CTV Boom is Real. *The Intelligence Gap Is the Opportunity.*

***Where is local CTV actually growing?
Which categories are winning, and in which markets?
What will 2026 cost you if you don't plan now?***

51,000 local brands ran CTV campaigns in 2025. Most of their competitors have no idea. That information misalignment is worth more than any media budget.

Local CTV is not a new channel — volume is up more than 32% since 2020. What is new is the intelligence gap between buyers who understand how the market *actually* works and those who are still planning around assumptions that are no longer true. The three findings below define that gap.

What the Data Reveals

01 Small markets are outperforming.

Markets outside the top 50 hold only a third of the U.S. TV population but captured 52.5% of local CTV impressions in 2025. National buyers don't compete there — so inventory is cheaper, less contested, and more available. That edge is real. It won't last.

02 Your summer media plan is about to get buried.

The Q3 efficiency window — local CTV's best CPM period — is closed in 2026 for 16 markets. 104 World Cup matches flood Dallas, Houston, LA, Miami, New York, and Seattle with national demand. Your most affordable quarter just got expensive.

03 Political spend will price you out of H2.

\$2.48B in projected political CTV spend in 2026 — up 128% from 2022 midterms. Political buyers don't negotiate. In competitive markets, they will outbid you. Wait too long and your inventory is gone.

About AdImpact

AdImpact provides comprehensive advertising intelligence across Linear TV and Connected TV, giving marketers, agencies, and brands the clarity they need to compete with confidence. With unmatched local-level visibility across all 210 U.S. markets, AdImpact helps teams understand where competitors are spending, track messaging and creative in real time, and plan and optimize media with precision.

About This Report

Data Span

Q1 2025 - Q4 2025

Advertisers Analyzed

51,100+ unique Local CTV advertisers

Geographic Coverage

All 210 U.S. television markets

Local CTV Definition

Includes advertisers that placed a minimum of 80% of CTV impressions within a single market.

Methodology

Impressions detected using AdImpact's proprietary ad catalog, together with AdImpact's ACR-powered Advanced TV panel, across major streaming platforms. Spending estimates derived from ad impression volume, market CPM rates, and advertiser flight patterns.

Published

Q1 2026 | AdImpact.com

Impression advantage in smaller markets is real, measurable, but closing.

Small markets delivered 52.5% of local CTV impressions in 2025, a 19-point overperformance relative to their population weight.

Despite representing only, a third of the U.S. television population, markets outside the top 50 delivered 52.5% of all local CTV impressions in 2025. That is a 19-point overperformance relative to population weight.

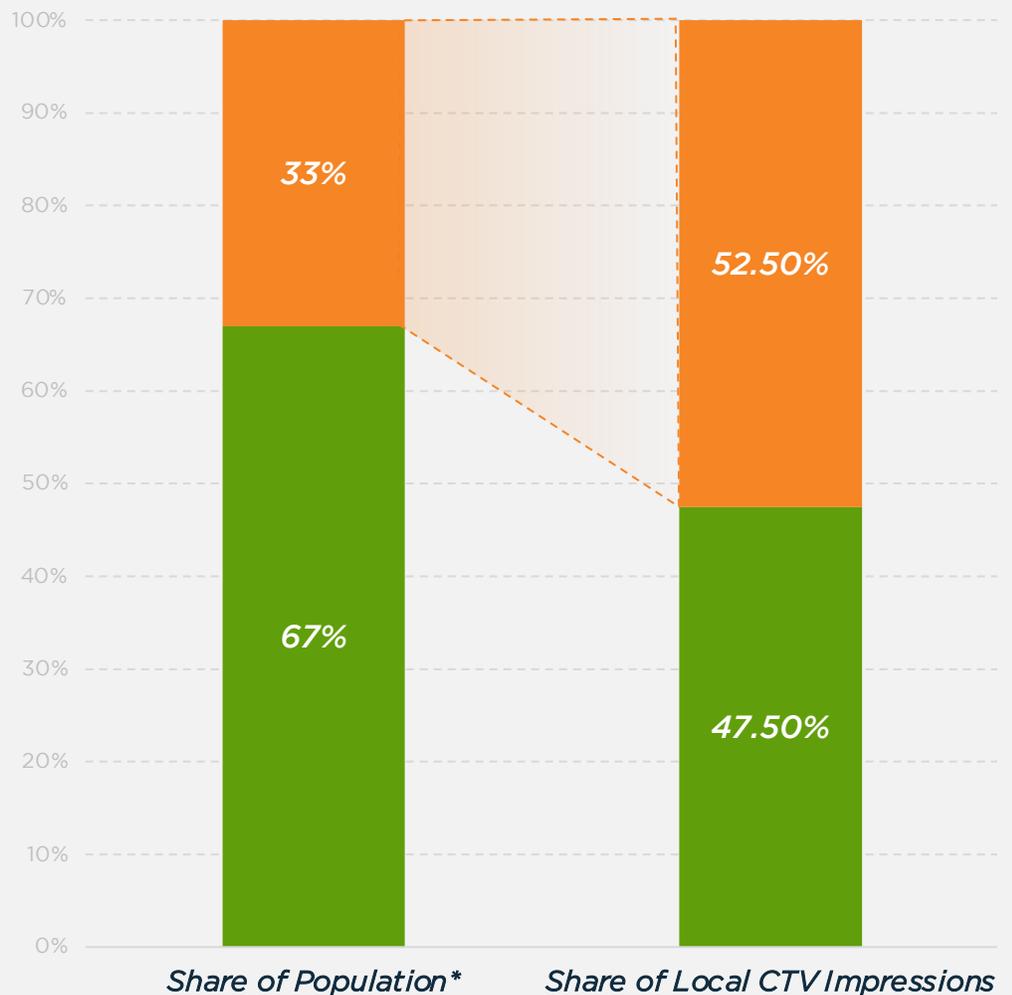
The reason is structural. National CTV buyers concentrate spend in the top 50 markets.

Outside the top 50, that pressure disappears. More inventory is available, less contested, and local advertisers build meaningful reach without competing against national budgets for the same slots.

For a home services company in Charleston, SC (#85) or a car dealer in Albany, NY (#60), this is a real competitive advantage.

SHARE OF POPULATION VS. SHARE OF LOCAL CTV IMPRESSIONS

- Top 50 Markets
- Markets 51+



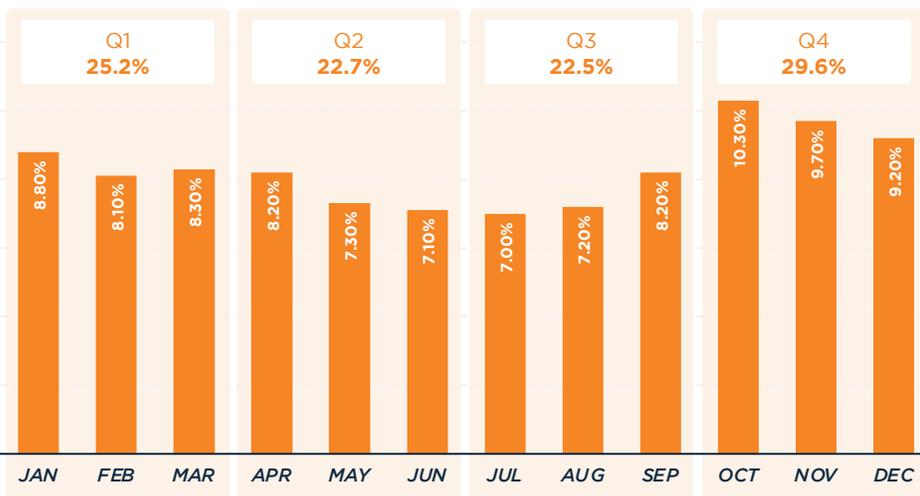
Source: AdImpact custom analysis of more than 51,000 unique Local CTV advertisers from 2025.

* Share of population derived from multiple sources relative to distribution of U.S. TV households; exact percentages may vary.

Q3 Was The Best Time To Buy. *In 2026, That Window Is Closing.*

Q1 carried more spend share (26.5%) than impression share (25.2%) as buyers paid a premium to start the year. Q4 inverted that: impressions (29.6%) outpaced spend (28.1%), driving an estimated CPM decline of nearly 10% versus Q1. Q3 is the efficiency sweet spot — spend and impression shares converge at 22.5%, near-perfect parity. Most local CTV buyers plan around category pressure and seasonal demand. Understanding the pricing dynamics is where the advantage lives.

AD IMPRESSION DISTRIBUTION | LOCAL CTV | 2025 ■ Impressions (% OF ANNUAL TOTAL)



AD SPEND DISTRIBUTION | LOCAL CTV | 2025 ■ Spend (■) Impressions (—) (% OF ANNUAL TOTAL)



Quarterly Breakdown

Most local CTV buyers plan around category pressure and seasonal demand. CTV viewership and inventory is expected to continue to grow, an understanding of the pricing dynamics leads to opportunities for local advertisers to exploit.

Q1 2025

Impressions: **25.2%**
Spend: **26.5%**
CPM: **Premium**

Q2 2025

Impressions: **22.7%**
Spend: **23.0%**
CPM: **Balanced**

Q3 2025

Impressions: **22.5%**
Spend: **22.5%**
CPM: **Sweet Spot**

Q4 2025

Impressions: **29.6%**
Spend: **28.1%**
CPM: **Impressions Driver**

Source: Adimpact custom analysis of more than 51,000 unique Local CTV advertisers from 2025.

Category Intelligence: Who Is Winning & Where

In contested election markets, political inventory pressure is not just seasonal. It is structural — no more off years.

Home: Every Market. Every Month. No Exceptions.

Home held the #1 position in local CTV impressions across every market size throughout 2025. No other category comes close to that consistency. HVAC, appliances, roofing, home improvement — are some of the advertisers that have committed to CTV as a core channel, finding that CTV bridges the gap between digital targeting and the living room experience, offering local advertisers a cost-effective way to achieve geographic scale on the high-impact 'big screen' in the home.

Automotive: Dominant in Small Markets. Pressured in Large Ones.

Automotive held the #2 position in markets 51-100 and markets 101+ for every single month of 2025. In the top 50, it fell to fifth, pushed down by

Services, Health, and Advocacy. Auto dealers in smaller markets are among the most consistent and sophisticated local CTV advertisers in the country. In major metros, they are fighting an all-out category war.

Health: Surges in Q4.

Health & Pharmaceuticals moved to #1 and #2 in top 50 markets during October and November — consistent with year-end insurance enrollment and elective care planning cycles.

Advocacy: Never Leaves the Top Five.

Advocacy & Government appeared in the top five throughout 2025, reflecting early political spending building toward the 2026 midterm cycle. In contested election markets, political inventory pressure is not just seasonal. It is structural.

ALL MARKETS CATEGORY RANKINGS BY LOCAL CTV IMPRESSIONS FULL YEAR 2025

Home was the top category for the year, followed by Automotive, Services, Health & Pharmaceuticals, and Advocacy & Government. Media & Entertainment finished sixth overall.

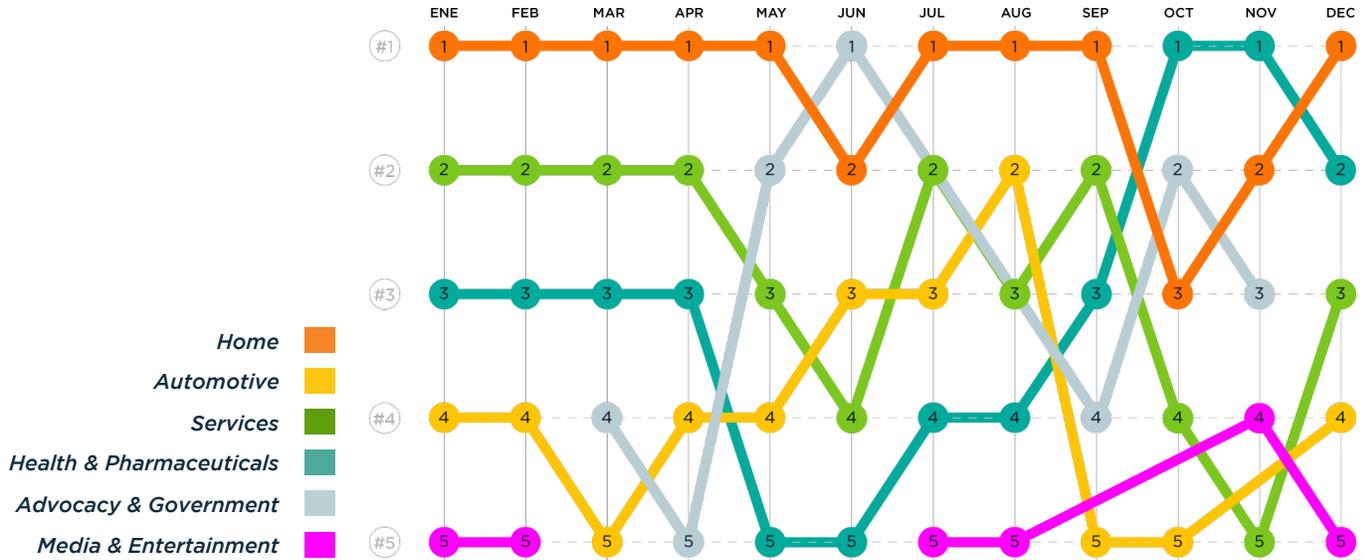


Category Rankings by Market Size

Full Year 2025

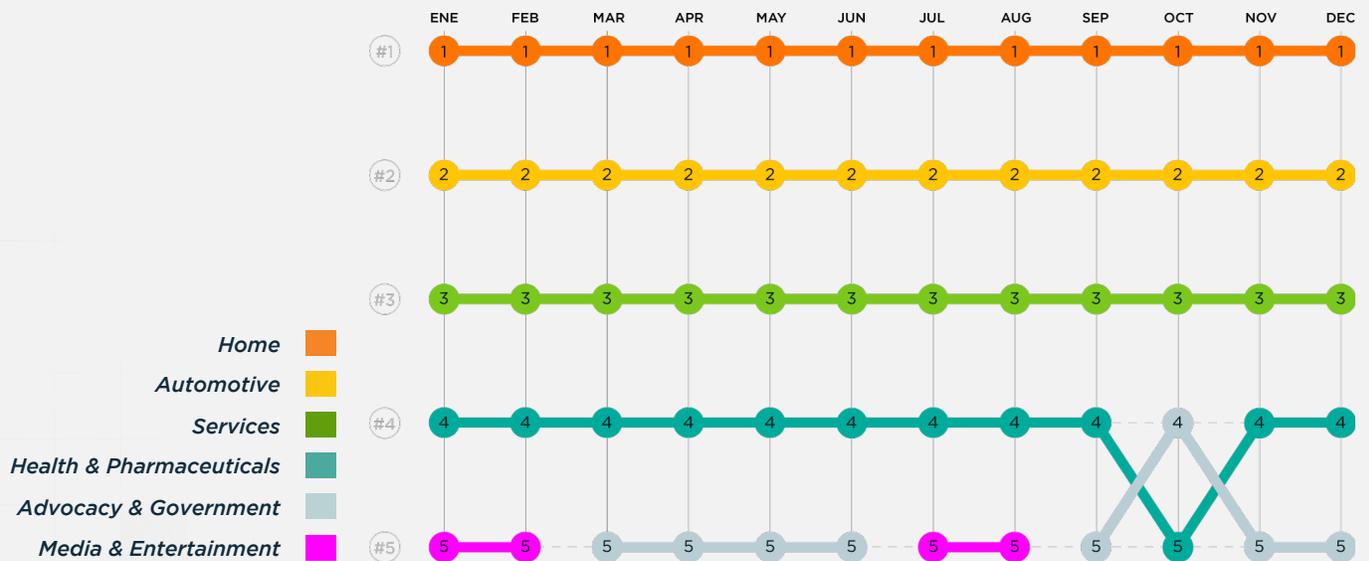
MARKETS 1-50
TOP LOCAL CTV CATEGORIES
RANKED BY IMPRESSIONS

Home was the top category for the year, followed by **Automotive**, **Services**, **Health & Pharmaceuticals**, and **Advocacy & Government**. **Media & Entertainment** finished sixth overall.



MARKETS 51-100
TOP LOCAL CTV CATEGORIES
RANKED BY IMPRESSIONS

Home led the way in larger markets, but not unanimously. **Services**, **Health & Pharmaceuticals**, and **Advocacy & Government** pushed **Automotive** to fifth, with **Media & Entertainment** finishing sixth.



3 Events Will Reshape Local CTV in 2026.

Plan Now or Pay More Later.

The efficiency windows in 2025 — the under contested small-market inventory, the Q3 CPM floor, the late-Q4 dip — will look different in 2026. As we enter Q2 and the rest of the year, three major events will drive up demand, tighten inventory, and push costs higher across the quarters local advertisers have relied on for efficiency.

Key 2026 planning statistics:

\$2.48B
Projected political CTV spend in 2026

128%
Increase in political CTV spending since 2022

104
World Cup matches across 16 U.S. host cities

01.
WINTER OLYMPICS — FEBRUARY 2026

Q1 Is Already the Most Expensive Quarter. The Olympics Made It Worse. Q1 already carries the highest CPMs of the local CTV calendar. The Games compounded that pressure. The top Olympic CTV advertisers — Progressive, Nissan, Toyota, Audi, State Farm — are not occasional buyers. They are the heaviest and most consistent CTV spenders in the market.

National auto and insurance brands don't share inventory with local buyers. They displace them.

02.
FIFA WORLD CUP — JUNE-JULY 2026 (U.S., CANADA, MEXICO)

Your Summer Efficiency Window Is Closed in 16 Markets. The World Cup runs June through July — historically the softest months for local CTV, with June and July each at 7.1-7.2% of annual impressions. In 2026, 104 matches across 16 U.S. host cities inject massive national demand into what was your most affordable quarter.

For commercial advertisers in Dallas, Houston, Los Angeles, Miami, New York, and Seattle: the summer efficiency window is effectively closed.

03.
MIDTERM ELECTIONS — NOVEMBER 2026

Political CTV Spend Is Up 128% Since 2022. AdImpact's Political Projections Report projects the 2025-26 cycle to be the most expensive midterms on record. CTV is forecast at \$2.48 billion in political spend, up from \$1.09 billion in the 2022 midterms.

Political buyers are not price-sensitive. They have hard deadlines, mandated spend levels, and no incentive to negotiate. In Texas, California, Michigan, Illinois, and North Carolina — the highest-spend competitive markets in 2026 — political money will enter the local CTV market early, lock premium inventory, and hold it.

Commercial advertisers who wait until Q3 to plan H2 will not find higher prices. They will find no availability.

Q1 is the most expensive quarter for local CTV, even prior to the Olympics

The Advertisers With the Best Intelligence Win.

Everyone Else Is Guessing.

The greatest risk for local CTV advertisers in 2026 is not overspending. It is under-informed spending. The competitive dynamics in every one of these 210 markets are real and measurable — and most buyers are flying without instruments.

Your biggest competitor is running local CTV right now. They have a flight pattern. They have a rate. They have creative in market. Do you know any of it?

The AdImpact platform gives every local buyer that visibility — advertiser rankings by market and category, creative access down to individual spots, spend estimates, flight patterns, and a unified view of Linear and CTV across all 210 U.S. markets. The same depth of intelligence in market 14 as in market 114.

Know before you buy

Know who is running CTV in your market, what they're spending, and what creative they're running. The AdImpact platform surfaces this for all 51,000+ local CTV advertisers across all 210 markets. Committing budget without this visibility isn't a media strategy. It's a guess.

Rethink the Q3 window — now.

Q3 is the most efficient quarter in local CTV. In 2026, the World Cup closes that window in host city markets for June and July. The new shoulder periods are May through early June and late July through September. That window is shorter. Book before someone else does.

In a competitive election market, plan H2 now.

Political buyers lock inventory early and don't negotiate. In high-spend midterm markets, commercial advertisers who wait until Q3 won't find higher prices — they'll find no availability. This is not a forecast. It is what happened in 2022 and 2024. 2026 will be worse.

If you're in a small or medium market, move now.

Markets outside the top 50 delivered 52.5% of local CTV impressions in 2025 with less competition and more accessible pricing than any top-50 market. That structural advantage will close as the channel matures. The advertisers who act on it now are the ones who will defend it later.

In a media type defined by fragmentation, clarity becomes the advantage.

Data Sources

1. AdImpact — Local CTV Advertising Analysis: 2025 Year in Review. Custom analysis of 51,100+ unique Local CTV advertisers across all 210 U.S. television markets, full year 2025.

2. Political Projections

AdImpact — Political Projections Report 2025–2026. Source for political CTV spend projections cited in Sections 5 and 6.

Methodology

All viewership data generated from AdImpact's Advanced TV panel of 23 million monitored Smart TVs using automated content recognition (ACR) technology. Non-linear content defined as viewing through TV native apps or OTT streaming devices. Spending estimates derived from impression volume, market CPM rates, and advertiser flight patterns.

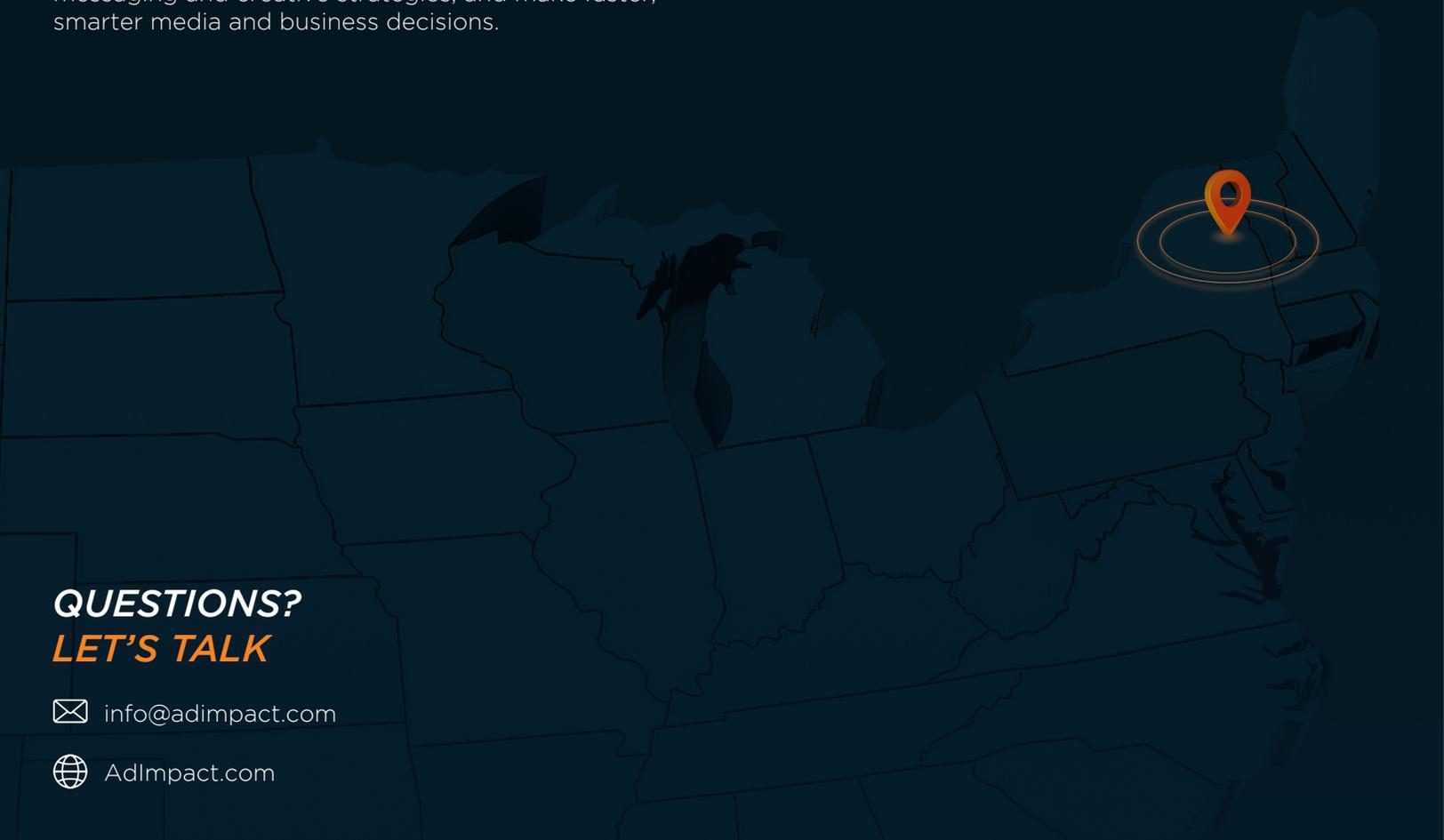
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About AdImpact

AdImpact is a leading advertising and market intelligence company delivering real-time visibility into advertising activity across traditional, digital, and emerging media platforms.

Our platform monitors more than one billion TV ad occurrences daily and powers the industry's largest ad catalog, with over 1.8 million unique creatives. AdImpact provides comprehensive coverage across all 210 U.S. markets and more than 41,000 ZIP codes, tracking advertising activity for over 90,000 brands—including over 19,000 local advertisers.

Through comprehensive, real-time ad intelligence, AdImpact enables organizations to track competitor activity, understand spending patterns, analyze messaging and creative strategies, and make faster, smarter media and business decisions.



**QUESTIONS?
LET'S TALK**

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