YOSPACE®

2026 FIFA World Cup

Dynamic Ad Insertion trends

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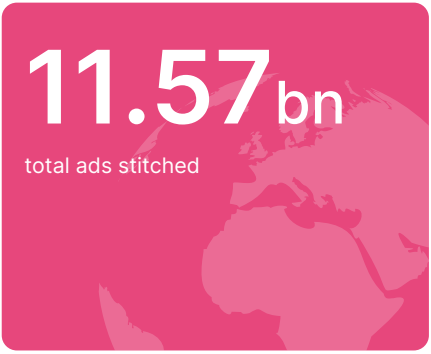
Introduction



The 2026 FIFA World Cup broke new ground for ad-funded streaming. Yospace stitched 11.57 billion one-to-one addressable advertisements into live video streams during the tournament, equating to 297 million advertisements per day. This is a substantial increase (41%) compared to the nearest show-stopping global sports festival, the Paris 2024 Summer Games.

Sports and advertising have long been inextricably linked. Advertisers crave major cultural moments that capture the attention of millions globally, and few events do that better than the FIFA World Cup. According to data from WARC, the 2026 tournament was set to inject $10.5 billion into the global advertising market.

For rights-holders, the 2026 edition was the most commercially valuable World Cup yet, with more teams, more matches, and more ad breaks than at any previous tournament.

The tournament's advertising value is unprecedented, particularly for streaming. Streaming CPMs reportedly ranged from $60 to $120 (Global Brands Magazine), while many rights-holders sold 100% of their inventory before a ball had been kicked. But selling inventory is only part of the challenge.

Every ad needs to be delivered, regardless of device, and measured successfully. That makes Dynamic Ad Insertion (DAI) one of the most critical technologies underpinning the event. As the bridge between streaming technology and ad tech, DAI played a central role in ensuring broadcasters captured the full value of every advertising opportunity.

In this report, we share data on viewing and advertising trends, how the former impacts the latter, and how the streaming tech and ad tech systems behind the scenes must adjust to cope with the huge scale and fluctuations in demand. What we share here is a marker of where sports streaming is at right now, but also an indication of where it is heading and how to prepare.

The data in this report is collated from Yospace's global customer base of broadcasters and streaming distributors, 14 of which were monetising the tournament.

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Total ads stitched

11.57 bn

FIFA World Cup 2026

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Biggest impact on an ad break

93 %

increase in stream starts

FIFA World Cup 2026

YOSPACE

All ads had **one-to-one addressability** and **real-time measurement**

FIFA World Cup 2026

YOSPACE

41%

more ads stitched per day

FIFA World Cup 2026

YOSPACE

Most watched ad break

Quarter-Final	
England	2
Norway	1

13m

ads stitched in two minutes

FIFA World Cup 2026

YOSPACE

Total ad breaks

2022	2026
326	637

FIFA World Cup 2026

What made the 2026 FIFA World Cup stand out

International football tournaments bring a different type of challenge compared to other major sports. With the exception of the final matches of the group stage, games do not clash, meaning all viewers everywhere are all focused on the same thing.

On the other hand, the Paris 2024 Summer Games, had audiences and advertising spread across a dozen or more pop-up channels to create a greater whole - save for a handful of tentpole events.

Where the audience is so focused, such as in the World Cup, the demands on the DAI to scale are amplified.

In this way, FIFA's assertion that the World Cup was the equivalent of "three Super Bowls a day" over five weeks carries some merit.

Why the 2026 tournament had extra ad value

The 2026 FIFA World Cup introduced some notable changes compared to previous editions, which had a substantial impact on advertising. The competition expanded from 32 teams to 48 and nearly doubled the number of matches from 64 to 104. It also ran for 38 days rather than 28, providing an extra 10 days of action-packed global viewing.

More teams = more matches = more ad breaks.

In addition, for the first time, FIFA permitted broadcasters to show advertising during three-minute hydration breaks in the middle of each half. For broadcasters who chose to utilise these placements, the number of ad breaks per match increased on average from four to six.

Combined, these changes meant that over a 104-match tournament, the available inventory across the 2026 FIFA World Cup was nearly double that of the 2022 tournament.

	FIFA World Cup 2022	FIFA World Cup 2026 (actual)
Teams	32	48
Duration	28 days	38 days
Matches	64	104
Ad breaks per match (Group stage)	4	6 (with hydration ads) 4 (without)
Ad breaks per match (knockout stage)	4.6 (5 matches decided by penalties)	6.4 (with hydration ads) 4.4 (without) (4 matches decided by penalties)
Total ad breaks	326	637 (with hydration ads) 429 (without)

2026 FIFA World Cup: Why this year's edition has extra ad value

Interestingly, fewer matches were decided by a dreaded penalty shoot-out (four) than in 2022 (five), despite there being substantially more matches. Five matches were settled by goals during extra time , whereas in 2022 every single match that entered extra time went on to penalties.

These additional high-stakes periods of play created new ad opportunities, and increased existing ad break potential for broadcasters during the incredibly tense knock-out stages:

1. Higher viewership for the full-time ad break
2. An additional ad break at the end of extra time (immediately before the penalty shootout)
3. An extra ad break after the penalty shootout

Broadcasters apply different ad strategies

Yospace's busiest ad break came at the start of half-time when England played Norway in the quarter-finals. 13 million one-to-one addressable ads were stitched within a two-minute window. This peak was the result of a few things coming together at the same time.

Different rights-holders applied ad breaks in different ways. Some monetised hydration breaks, others didn't, some placed two ad breaks during half-time with a period of match analysis in between, and others placed a series of shorter ad breaks interspersed with clips of match highlights.

There were also variations from one match to another in how many commercial broadcasters showed each match.

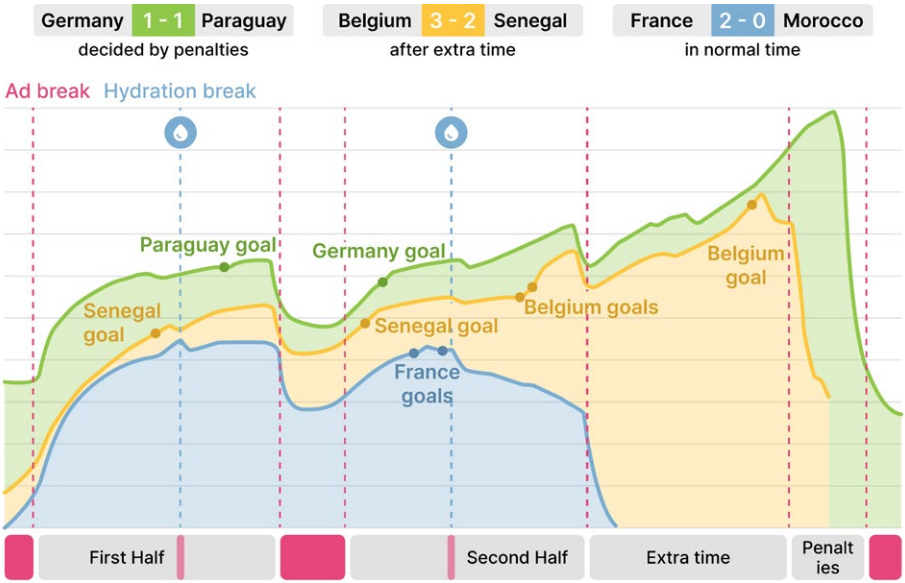
Some rights-holders streamed every game. Across Europe, there tended to be a split of matches between Public Service Broadcasters (PSBs) and commercial rights-holders.

Half-time during the England-Norway game saw 10 Yospace customers stream the same match and stitch ads in the same brief window. Some rights-holders cut to match highlights after two minutes. Others kept rolling with ads for an extra minute or so. Interestingly, a number of European audiences fell off after that initial two-minute burst as their clocks ticked past midnight.

Comparing audience and advertising trends

Here, we're looking at three matches, with very different outcomes. To demonstrate the impact of unpredictable in-match events on audience behaviour, we'll look at three matches with very different outcomes. When compared side-by-side, the resulting impact on viewing and advertising trends is stark.

First, a note on the presentation of the data in the graph: These trends are not to scale. Overall concurrencies have been adjusted to allow the France game (in blue) to appear the smallest, in order to create a visualisation that is easy to follow. They have also been slightly time-shifted so that the ad break timings match. However, the viewing trends themselves, the ups and downs, are representative of what actually happened.



This graph contains data from Yospace customers across the world with World Cup rights.

France v Morocco (France win in normal time)

In this quarter-final match, France strolled to a straightforward - and expected - victory, with two goals in the second half killing off any prospect of an upset. France was awarded a penalty about 20 minutes in and the Video Assistant Referee (VAR)

check that followed took an agonising three minutes to reach a resolution. Between the penalty being awarded and France's Kylian Mbappé kicking the ball, there was a 37% increase in stream starts. The first hydration break came barely a minute after his miss.

That hydration break saw a 5.56% decrease in viewers, which is better than you would normally see for an ad break in a football match. But hydration breaks were an unknown quantity before this tournament, and across the board we saw a lower audience drop-off than other ad breaks. Being only three minutes long, viewers largely stuck with the stream.

With the game decided in France's favour after the two second-half goals, we saw a steady decline in viewers (44.41%) over what the hydration breaks have effectively turned into the last quarter.

Belgium v Senegal (Belgium win in extra time)

Earlier in the tournament, Belgium's dramatic comeback from 2-0 down against Senegal in the round of 32 drove a 93% increase in stream starts within two minutes, and rose steadily until the full-time whistle and subsequent ad break a few minutes later. This was the biggest single impact of in-match events on viewing and advertising throughout the entire tournament.

We can compare what happened here at full time to the France-Morocco match, which saw a 52% drop-off in viewers within five minutes of the final whistle. Belgium's late goals meant the drop-off was only 11%, so the ad break at that point benefitted from a substantially larger audience than it would have had without the late goals and a 2-0 victory for Senegal. On top of that, extra time also created an extra ad break - after the final whistle.

Germany v Paraguay (Paraguay win in a penalty shoot-out)

This round of 32 match delivered an upset, as four-time World Champions Germany lost a penalty shoot-out for the very first time in their history. Paraguay were ranked 41st in the world before the tournament, making Germany the clear favourites to win the match.

With the score level at 1-1 going into the second-half hydration break, and Paraguay putting a lot of pressure on Germany as they sought a second goal, the final "quarter" saw a sharp and steady increase in viewers as the sense of jeopardy increased - at this stage, a single goal would have been decisive.

When the match went into extra time, we saw a similar audience trajectory to the Belgium-Senegal game. But, on this occasion, it continued into a penalty shoot-out.

During the five minutes between the whistle blowing for extra time and the first penalty kick, the audience increased by 6.74%. As you can see in the graph, it grew further from there.

The ad breaks at full time and after extra time benefitted from a large increase in audience, plus there was an extra ad break, placed after the penalty shoot-out.

How hydration breaks are changing the economics of football

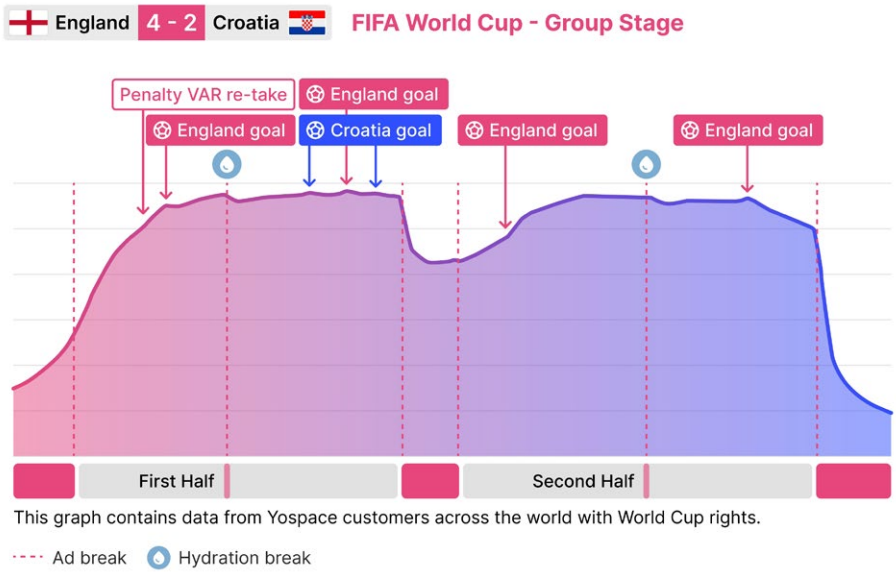
FIFA broke new ground when it announced that hydration breaks during the 2026 World Cup could be monetised. The FIFA rules allow for a two-minute ad break within the three-minute hydration window.

Ascertaining the true value of these new opportunities is hard - broadcasters seldom share their CPMs publicly. Speaking to the BBC, University of Pennsylvania professor Rob Di Gisi suggested advertising in hydration breaks would be worth around $1 billion globally.

The utilisation of hydration-break advertising varies by market. In the UK, Ofcom regulations limit advertising to a maximum of 12 minutes per clock hour, which limits the opportunity to monetise hydration breaks. Other markets have fewer restrictions.

The appeal of them, to those without such restrictions, is clear: six ad breaks rather than four per match is a lot of additional inventory.

Another benefit, as the data made clear, is the audience size at the time of the ads. If we look at England's opening match against Croatia, you can see how the ad breaks map out.



Football audiences during the tournament typically built throughout a match, reaching their peak ahead of the first hydration break. Audiences tended to drop off during the 15-minute half-time break and again immediately after the final whistle. But, as you can see, for those shorter hydration breaks, they kept watching.

Analysis across multiple rights-holders shows hydration-break advertising consistently attracts larger audiences than many traditional break positions. In this match, the most popular ad break came at the start of half-time, with the first hydration break commanding just 0.15 per cent fewer viewers. The second hydration break also outperformed all other traditional advertising slots.

How Dynamic Ad Insertion scales to meet in-match demands

There are several key tenets to DAI that underline its value:

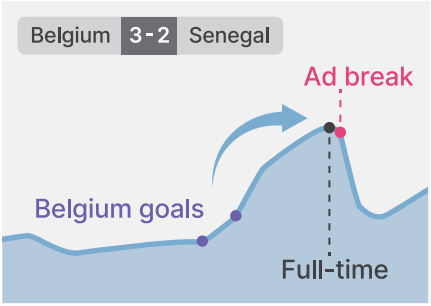
1. One-to-one addressability
2. Premium viewer experience
3. Scalability
4. Trusted and useful metrics

Scaling live streams to millions of viewers alone is a challenge. Adding all of these addressable components adds considerable complexity. The larger the scale, the greater the complexity because of all the machinations happening for each and every stream. Throw in the big World Cup traffic fluctuations, and that complexity is exacerbated.

Also, it's important to remember that the pursuit of maximum monetisation means more than stitching an ad. It means stitching the ***right*** ad that has achieved the highest value at that ***specific*** time.

It's quite often the case for broadcasters with World Cup rights to sell advertising inventory in advance. Even in these cases, ad calls for each stream must still be made, the ad creatives must still be stitched, and, most importantly, viewability metrics must still be generated on behalf of each streaming session.

How Dynamic Prefetch works with the adtech to scale



Prefetch technology is designed to upport such scale and surges in traffic and has been around for a while, but it is becoming more advanced with each successive big traffic event.

Prefetch addresses the fact that, no matter how well the ad-stitching component of DAI scales, it is one part of an intricate ecosystem that is bound to both streaming technology and ad tech. DAI must be intrinsically built into live streaming architecture to enable smooth, uninterrupted stitching of ads. It must also collaborate closely with ad servers to process ad creatives, make and respond to ad calls, and feed back real-time viewership data. DAI acts as the bridge between these two worlds, so it is, arguably, the most critical piece of the puzzle.

To achieve maximum monetisation from ads, DAI must collaborate well with the ad tech to ensure both are primed to scale to the same heights. This is where prefetch comes in. Prefetch spaces out ad requests, giving the ad tech the time it needs to trade, make the right monetisation decisions, and respond to the DAI.

Basic prefetch systems operate closer to just-in-time (JIT) ad insertion, providing only an additional video segment duration for ad calls (typically a few seconds). This approach provides some additional time for ad requests but still creates a bottleneck, particularly during sudden surges in viewership, exemplified by Belgium's comeback against Senegal. The time available for the ad tech to respond also remains constrained.

To support the scale and fluctuations in traffic that we saw during the World Cup, a deeper level of prefetch is required. Yospace's dynamic prefetch can be timed minutes before the ad break, allowing ad requests to be spread over a much longer period. As the process is asynchronous, there is more time to optimise demand and resolve the ad break without risking an impact on the viewer experience.

Because of the extra time afforded, dynamic prefetch also supports advance bidding (similar to header bidding for websites) by giving SSPs additional time to optimise demand before the prefetch call is made.

Dynamic prefetch also allows multiple ad pods to be prefetched concurrently, with the appropriate pod selected when the break occurs. This provides greater flexibility to respond to changing in-match conditions while retaining the scale and monetisation benefits of prefetch.

In short, dynamic prefetch is a critical tool for maximising the value of ad breaks at scale, while maintaining a perfect viewer experience.

What 2026 tells us about the future of monetising sports

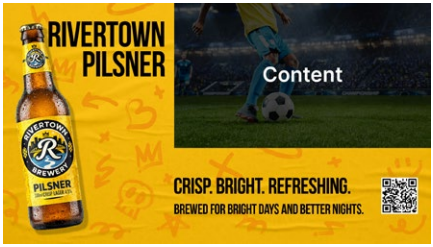
Yospace stitched 297 million advertisements per day during the 2026 FIFA World Cup. This is a sizable 41% increase from the Paris 2024 Summer Games, a similarly sized global event from just two years prior.

The increase in traffic is mainly attributable to changing viewing behaviours as more and more people stream to the main screen in the living room. This change in viewer behaviour is, in turn, enabling broadcasters and media owners to increase the amount of their inventory that is addressable.

According to Nielsen, OTT accounts for nearly half of all TV viewing in the USA. It's a big business. And yet it doesn't account for half of all viewers. There is still a lot of room for growth ahead of the Summer Games in 2028 or the World Cup in 2030.

Some of the latest developments in and around DAI technology will change the way we watch and monetise live sports when these events come around.

Non-linear ad formats



L-squeeze ad example

During the 2026 FIFA World Cup, different broadcasters took different approaches to monetising hydration breaks. A notable example was Telemundo in the USA, which deployed sponsor-branded overlays while maintaining the live video feed and commentary, allowing viewers to stay connected to the action.

The IAB Tech Lab Ad Format Hero project has standardised a set of non-linear ad formats, including overlays, lower-thirds, squeezebacks, and side-by-side presentations. The IAB is currently working to simplify trading, delivery, and measurement across platforms. Such standardisation creates a path to widespread adoption, rather than relying on bespoke ad campaigns like Telemundo's.

Another crucial benefit is that one-to-one addressability can be applied to the new formats, as well as dynamically created QR codes to link an ad view more effectively to a sale. These factors mean that the new formats should hold substantial value for advertisers.

Yospace's Ad Presentation plugin enables delivery of these new formats to a breadth of CTV devices, including many legacy devices, using both Server-Side Ad Insertion (SSAI) and Server-Guided Ad Insertion (SGAI).

Such flexibility means we are likely to see them on our screens sooner rather than later, perhaps even for the 2027 FIFA Women's World Cup in Brazil.

SGAI powering extended DVR and low latency

SGAI is the next stage in the evolution of ad insertion. The vast majority of broadcasters of the 2026 FIFA World Cup used SSAI to monetise games. By the 2030 tournament, most will have transitioned to SGAI.

There are several notable benefits of an SGAI approach that will impact sports viewing. Among them are...

Extended DVR windows

By handling advertising separately from the primary content playlist, SGAI creates an operational efficiency that makes longer DVR windows easier and more cost-effective to support. Viewers can rewind further back through a live event - for several hours - while broadcasters can monetise historic ad breaks dynamically at the point at which they are viewed. Extended DVRs bring a dual benefit: they can improve the viewer experience while also opening up new inventory for the broadcaster.

Low latency

SGAI can also support addressable advertising without introducing additional latency. The need for live streaming latency to match, or improve on, that of live broadcast has long been a goal for live streaming, especially as it draws increasing audience numbers. Live broadcast latency generally falls above the 5-second mark. Latency in live streaming could be anywhere from 20-45 seconds, with low latency generally considered to be 1-6 seconds.

Yospace successfully demonstrated sub-5-second glass-to-glass latency using one-to-one addressability as part of the IBC Accelerators programme in 2025. Ad insertion was responsible for sub-1-second of the overall latency, in one of the first examples of the new MPEG-DASH Events standard (which is a form of SGAI).

Looking ahead to future global sports events, we will see a lot more DAI-enabled low latency deployments, as well as extended DVR windows. Some will arrive in time for the 2028 Summer Olympics. Come the 2030 FIFA World Cup, we will probably stream most matches with these features.

Read more about our IBC Accelerator project on low latency with SGAI

Closing the measurement gap

Viewability remains one of advertising's most important metrics, but measuring it consistently across Connected TV devices has proven difficult, particularly for syndicated channels and distribution partners where the rights-holder does not control the player environment.

Two emerging standards are helping solve this problem. SVTA's Ad Creative Signalling provides a standardised way for players to process tracking information without custom integrations. CMCDv2, developed by CTA WAVE, enables players to report standardised playback information such as playhead position and user interactions, allowing the DAI platform to perform the tracking.

Together, these approaches create a path toward reliable, IAB-certified measurement in environments where granular reporting has historically been difficult to achieve.

Future sporting tournaments will benefit from IAB-certified measurement being applied more broadly across the full streaming audience. This will enhance advertiser trust and willingness to invest.

Find out more about CMCDv2 and SVTA signalling and why they matter here.

Conclusion

In terms of advertising, the 2026 FIFA World Cup was the most profitable ever edition of the tournament, or of any sports tournament. In terms of ads stitched, it was head and shoulders above the last edition of the Summer Games, which was just two years ago.

But two years is a long time given the growth of ad-powered streaming. During the Euro 2024 football tournament, Yospace stitched 6 billion ads - a record at the time. Fast-forward two years and that figure has almost doubled. And there is still a lot of room for growth ahead.

On top of that, a new phase of standards-based technologies is coming into view (one that Yospace terms DAI 3.0). This phase promises new, interactive inventory in the form of non-linear ad formats, better viewer experiences with extended DVR and low latency, and broader, deeper measurement data to add more value to CTV advertising for brands.

Underpinning all of these innovations, of course, is Dynamic Ad Insertion. Its ability to handle complexity and scale sufficiently to meet the demand, even for the most dramatic in-match moments, is the key to monetisation success.

Are you looking for help with your Dynamic Ad Insertion strategy? Contact us to speak to one of our experts.

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sales@yospace.com

Dynamic Ad Insertion 3.0
How industry standards are powering the future of OTT advertising, and what to do about it.

Understand how Dynamic Ad Insertion has evolved from CSAI to SSAI and now towards SGAI, and why the work underway across organisations such as the IAB Tech Lab, SVTA, and CTA WAVE is laying the groundwork for what comes next. From measurement and observability to new CTV ad formats and low-latency delivery, this guide provides a practical view of how to prepare your ad insertion strategy for the next generation of streaming monetisation.

Download your free copy of the whitepaper now

Dynamic Ad Insertion 3.0

How industry standards are powering the future of OTT advertising, and what to do about it.

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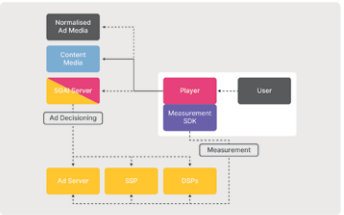
Server-Guided Ad Insertion (SGAI)



The latest development is Server-Guided Ad Insertion (SGAI). This is a blend of CSAI's flexibility and the same consistency and privacy benefits as SSAI. Rather than stitching ads into the primary content stream, the player is instructed to fetch a new playlist for the ads, switch the presentation from content to ads, and back again.

This is basically what the old CSAI SDKs had to do, but the difference with SGAI is that it is standardised within the streaming protocol. Both the HLS and MPEG-DASH standards now include new features to fully support SGAI. Being governed by these standards means that, over time, the multitude of devices will have consistent SGAI support, gradually replacing SSAI in most cases.

within ultra-low latency streams for the first time, using the MPEG-DASH Alternative Media Presentation, which is one of the standards powering SGAI. This demonstration was part of an IBC Accelerator Programme, which included Comcast, Bouygues Telecom, BT Media & Broadcast, Channel 4, GLOBO, RTE, SVTA, and YLE.

VOD

For VOD, the rules in HLS and MPEG-DASH on manifest immutability require an SSAI implementation to commit to resolving all ad breaks before playback can begin. If the ad load is high, this can affect video start-up time. Ads can also be dynamically requested. SGAI is like CSAI in this regard: ads are resolved as needed, so the ad load can be dynamically varied for each break.

SGAI is often described as a return to CSAI. In reality, it is an optimisation of SSAI as it shares more DNA with SSAI. It retains server-side control of decisioning and signalling but uses the client to execute the stitching in a standardised way.

As with SSAI, one limitation remains. The changes to the HLS and MPEG-DASH standards that provide support for SGAI do not go so far as to provide a standard method of ad measurement. Some form of server-side or client-side reporting outside the scope of the player is still required.

Viewer experience benefits

Extended DVR windows

Supporting long DVR playback buffers with SSAI is computationally intensive because it requires manipulating large manifest files for each user. Because the ads in the timeline are delivered separately, SGAI allows all users to share the same primary content playlist. For live streaming, this enables the delivery of long DVR playlists with no additional compute resources.

For long DVR live streams, breaks encountered by users scrubbing backwards in the timeline can be dynamically resolved, creating more ad placement opportunities for the broadcaster.

Low latency

The addition of addressable advertising to live streams has been a major hurdle in making low latency commercially viable. However, because of the separation of content and ads, SGAI offers the ability to implement live streaming with no additional latency while still enabling one-to-one, addressable advertising.

New non-linear ad formats

SGAI has been associated with the development of new ad formats, such as L-squeeze ads, side-by-side playback, and lower-third display ads. In truth, the technical foundations to support such formats have been around for a while, using the IAB's Tech Lab's Secure Interactive Media Interface Definition (SIMID).

That being said, what matters to broadcasters is being able to place these ad formats more easily and at scale, which, in turn, requires advertisers to build campaigns that take these new capabilities into account. Without standardisation of these formats, they will remain as bespoke projects between the advertiser and the broadcaster.

Because these formats are "non-linear" they also offer additional placement opportunities, providing broadcasters more advertising inventory, especially in major live events.

The IAB Tech Lab's Ad Format Hero initiative in January 2026 released authoring guidelines for 8 new non-linear ad formats. By April 2026, IAB Tech Lab will update its suite of specifications to enable the trading, trafficking, and delivery of ads. Advertisers will then be able to scale their campaigns as the ad tech ecosystem adopts these changes.

For certain formats where content and video ads are played concurrently (squeezebacks or side-by-side), the benefits of the foundations provided by SGAI are clear; however, to capitalise on this, streaming tech standards must be extended to meet the needs of these new formats. This is not yet done, but for the first time, there is active, ongoing collaboration between the SVTA and the IAB Tech Lab to deliver this alignment.

DAI 3.0 and what's next

SGAI is acting as a catalyst for renewed collaboration between ad tech and streaming tech organisations. Historically, these communities evolved with little communication, but DAI 3.0 demands alignment.

Broadcasters want to adopt new ad formats without extensive proprietary engineering. Advertisers want the ability to scale innovative creatives across networks and, of course, to measure them consistently. Standards that are understood and supported by all pillars of the ecosystem are the only way to deliver that future.

We are not quite at DAI 3.0 yet, but it is clear that the industry is organising itself to make it a reality. This phase we're in right now is more like DAI 2.5. The good news is that the work underway across the IAB, SVTA, and CTA WAVE is laying the foundation for a fully standardised, scalable, and interoperable ad insertion ecosystem.

As these standards mature, broadcasters will gain a wider choice of formats and inventory, and advertisers will be able to execute new creative ideas at scale. The industry as a whole will benefit from simplified integrations, improved measurement, and more consistent playback experiences.

“

The 2026 FIFA World Cup was a great commercial success for TV4, both in terms of advertising on TV4 Play and via our distributor partners - not just in Sweden but across the Nordic region. Yospace’s scale, reliability, and expertise really set it apart as TV4 Play reached its highest level ever for active users during a sporting event.

Jonas Rundgren

Head of Advanced Advertising, TV4