

Sports Bettors (21+)

United States

Report created on 8/19/2026

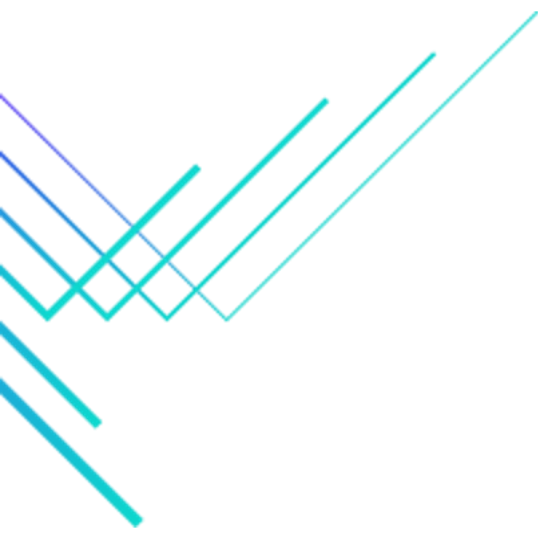
Analysis and visualizations may include partial data for the current period

Executive Summary

Sports Bettors (21+) are a younger, higher-income, and highly digital audience with comparatively resilient demand signals and multiple high-reach media contexts, although momentum softened in 2026.

- **Est. Population Size:** 9M-10M
- **They have comparatively strong spending power.** Sports Bettors skew higher income than U.S. adults overall, with 23% in \$100k+ households versus 17% and fewer under \$50k (43% versus 54%). They are also younger, with Millennials at 41% versus 29%, which supports mobile-first shopping and entertainment spending.
- **Their demand signal is stronger than average, even as 2026 cools.** Sports Bettors' Consumer Health Index averages 6.0 year to date versus 1.6 for the general population, and the latest reading remains expansionary (about 3.0 versus -0.7). Confidence and finances also look better than the headline, with an Index of Consumer Sentiment of 104 versus 90 and Personal Finances (Net better) at -7 points versus -21.
- **They are highly reachable in live sports, streaming, and social.** Live sports viewing reaches 89% of Sports Bettors versus 66% of adults, and podcasts reach 79% versus 56%. Social platforms also stand out, including Instagram (80% versus 64%), TikTok (74% versus 58%), Reddit (62% versus 41%), and X (60% versus 38%), which supports event-timed and creator-style storytelling.

Note: The most recent quarter includes data through 2026-08-19, so quarter-over-quarter comparisons that include this period reflect a partial quarter.



Who They Are

Sports Bettors skew younger, higher income, and more likely to have kids — and Gen Z's share is rising

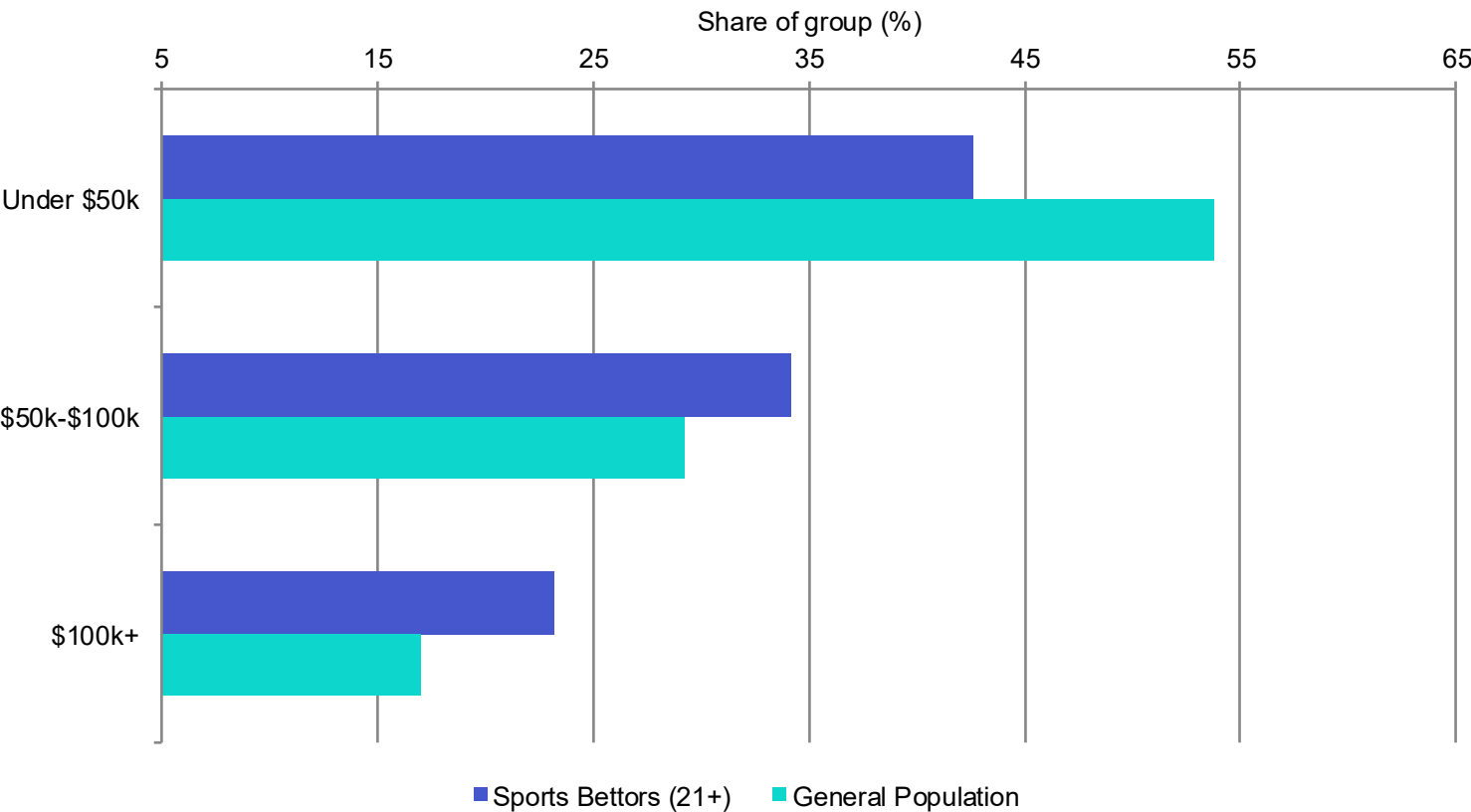
Sports Bettors skew higher income and younger than the general population, and they are more likely to have kids at home; over time, Gen Z's presence grew and income drifted modestly upward.

- Sports Bettors are more likely to live in higher-income households than U.S. adults overall. Twenty-three percent are in \$100k+ households versus 17% of adults, and fewer are under \$50k (43% versus 54%). This income mix supports higher-priced options when the value is clear.
- Younger adults define today's audience, and the mix is trending even younger. Millennials account for 41% of Sports Bettors versus 29% of adults, while Gen Z's share inside the audience has risen by 12 points since 2022. This profile favors mobile-first experiences and streaming-heavy media plans.
- Kids in the household are more common among Sports Bettors. Forty-five percent report kids at home versus 30% of adults, which adds family spending occasions and concentrates weekend and evening planning.
- Over five years, the audience's income distribution has edged higher without sharp swings. The \$100k+ share rose by about 2 points, while the under-\$50k share fell by about 4 points. This supports planning for steady, not sudden, changes in purchasing power.

Higher-income households are more common among Sports Bettors than among U.S. adults

Sports Bettors are more concentrated in \$50k–\$100k and \$100k+ households than U.S. adults overall, signaling comparatively stronger spending power.

Income mix - Sports Bettors (21+) vs General Population, United States, Aug 1, 2025 to Aug 18, 2026



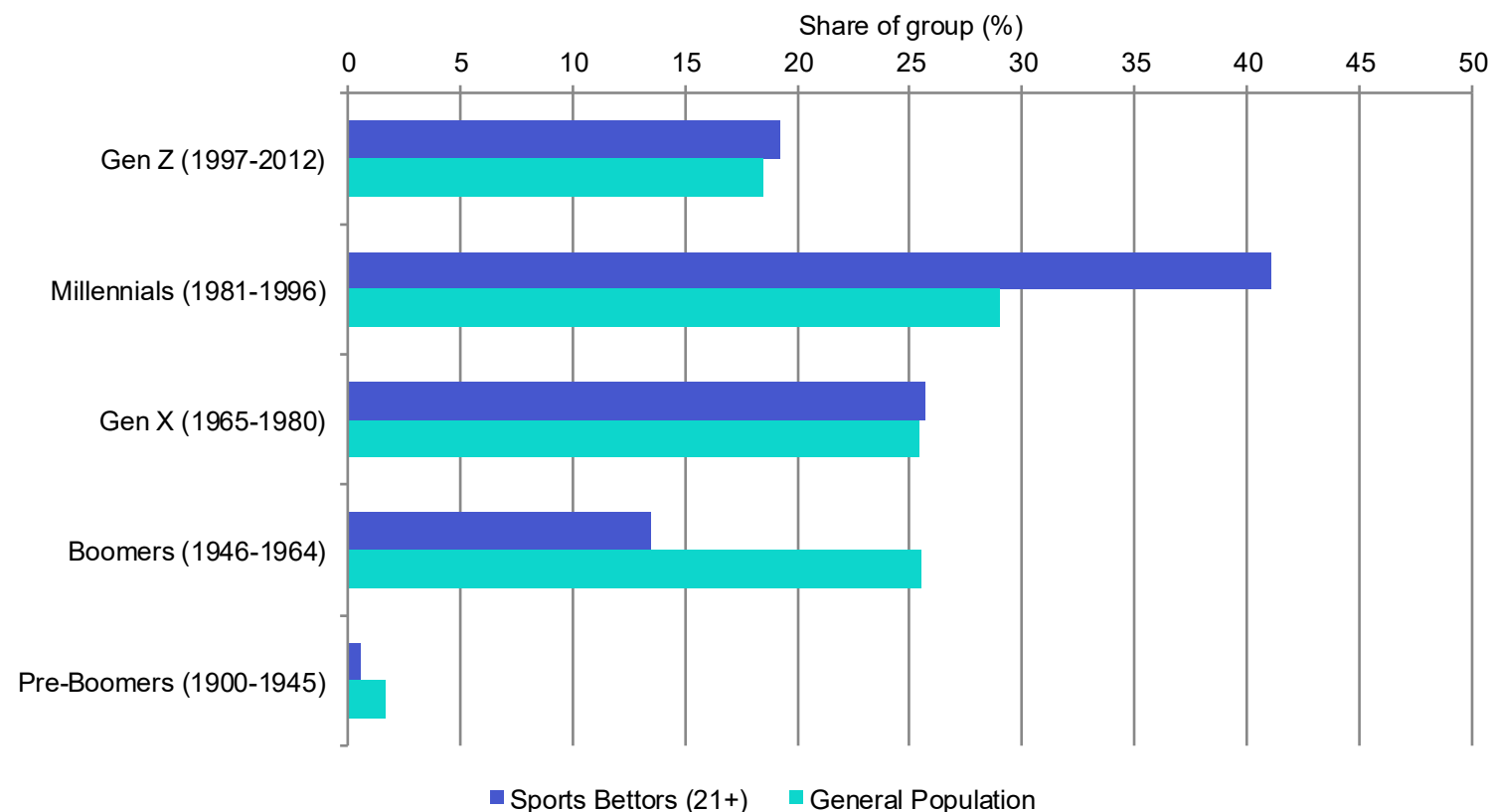
- Higher-income households are more common among Sports Bettors. Twenty-three percent are in \$100k+ households versus 17% of adults, and 34% are in \$50k–\$100k versus 29%. This mix supports premium add-ons and higher-priced bundles when they reduce hassle or add clear benefits.
- Lower-income households are less represented among Sports Bettors. Forty-three percent are under \$50k versus 54% of adults, which reduces the share of the audience under the tightest day-to-day constraints. Leaders can treat this as a tailwind for discretionary categories, while still keeping entry price points for broad access.

Millennials lead the Sports Bettors audience, with Gen Z rising and fewer Boomers

Millennials anchor the Sports Bettors audience today, while Boomers are a much smaller share than in the general population.

- Sports Bettors are materially younger than the country overall. Millennials make up 41% of the group versus 29% of adults, while Boomers account for 13% versus 25%. This age mix supports greater reach through mobile-first and streaming-heavy channels.
- Gen Z is already a meaningful slice of Sports Bettors at 19% versus 18% of adults. As this share grows, more of the audience will be in early career and family-forming stages, which can shape category priorities and timing.

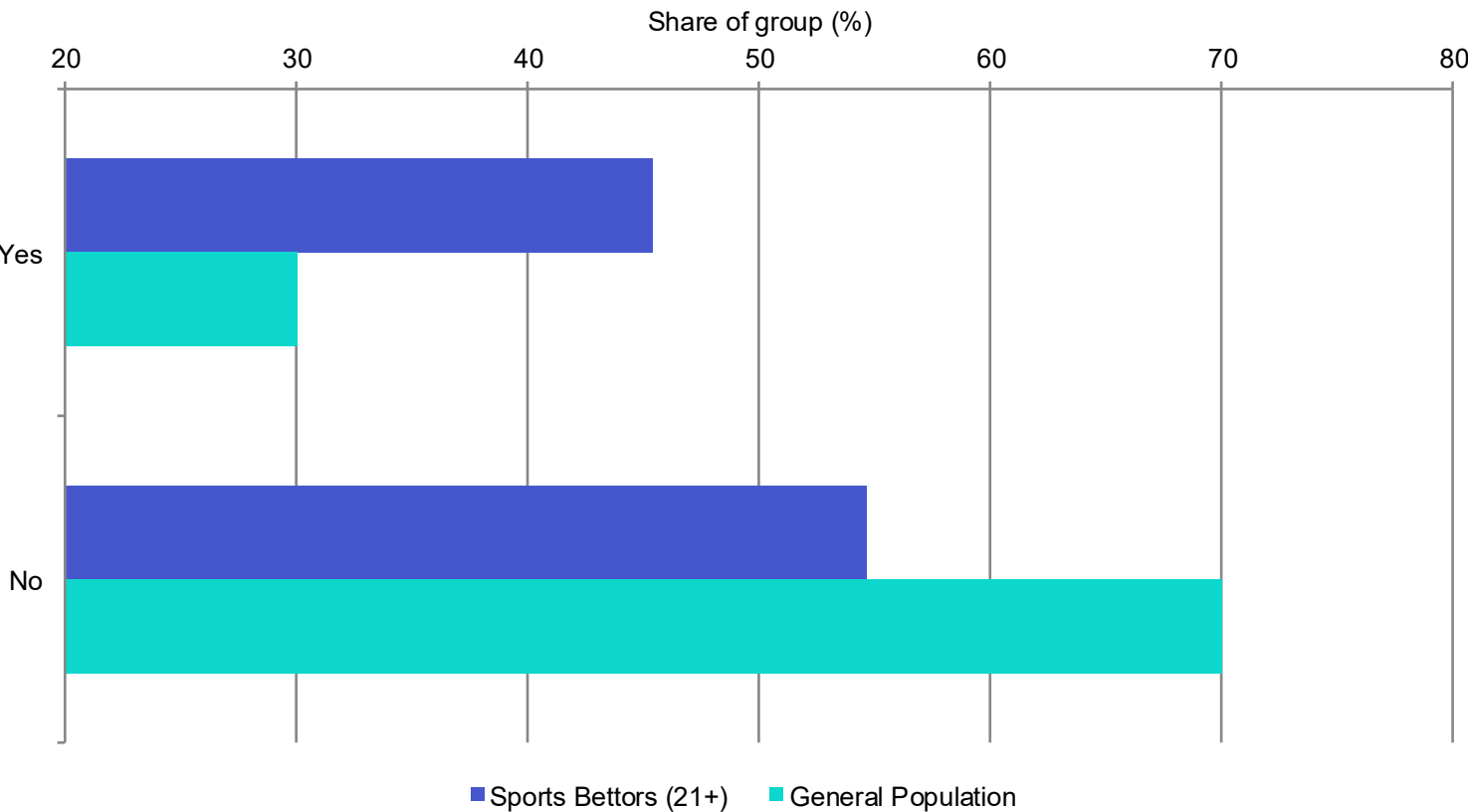
Generation mix - Sports Bettors (21+) vs General Population, United States, Aug 1, 2025 to Aug 18, 2026



Households with kids are more common among Sports Bettors, shaping spending occasions

Nearly half of Sports Bettors report kids in the home, creating more family spending occasions and weekend-heavy timing.

Parents in household - Sports Bettors (21+) vs General Population, United States, Aug 1, 2025 to Aug 18, 2026

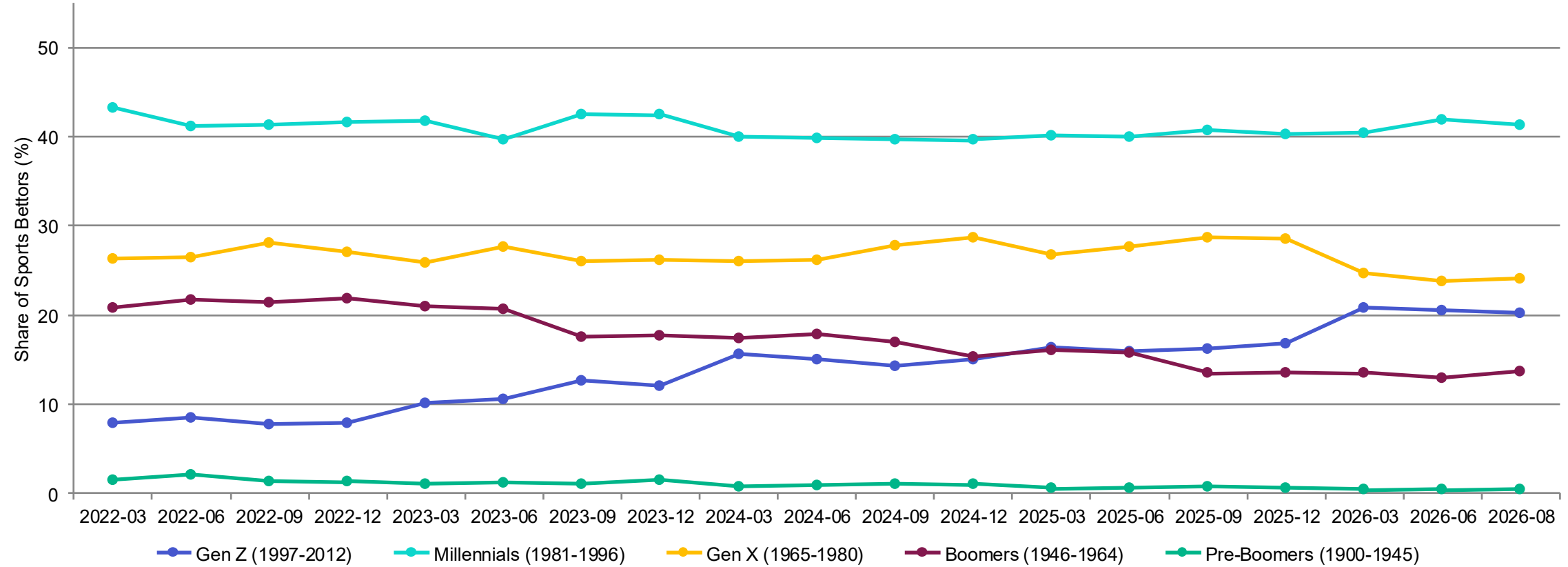


- Kids in the household are more common among Sports Bettors (45% versus 30% of adults). This raises the number of family-driven spending occasions, including dining out, local experiences, and travel. It also increases the importance of evening and weekend timing.
- Brands can treat family routines as part of the reach plan. Offers that fit busy schedules and group activities can align with how many of these households allocate time and money.

Gen Z's share within Sports Bettors is rising steadily as Boomers recede

Gen Z has grown steadily as a share of Sports Bettors since 2022, while Boomers have become a smaller share; Millennials remain the largest group.

Quarterly generation mix among Sports Bettors (21+), United States, Q1 2022 to Aug 18, 2026

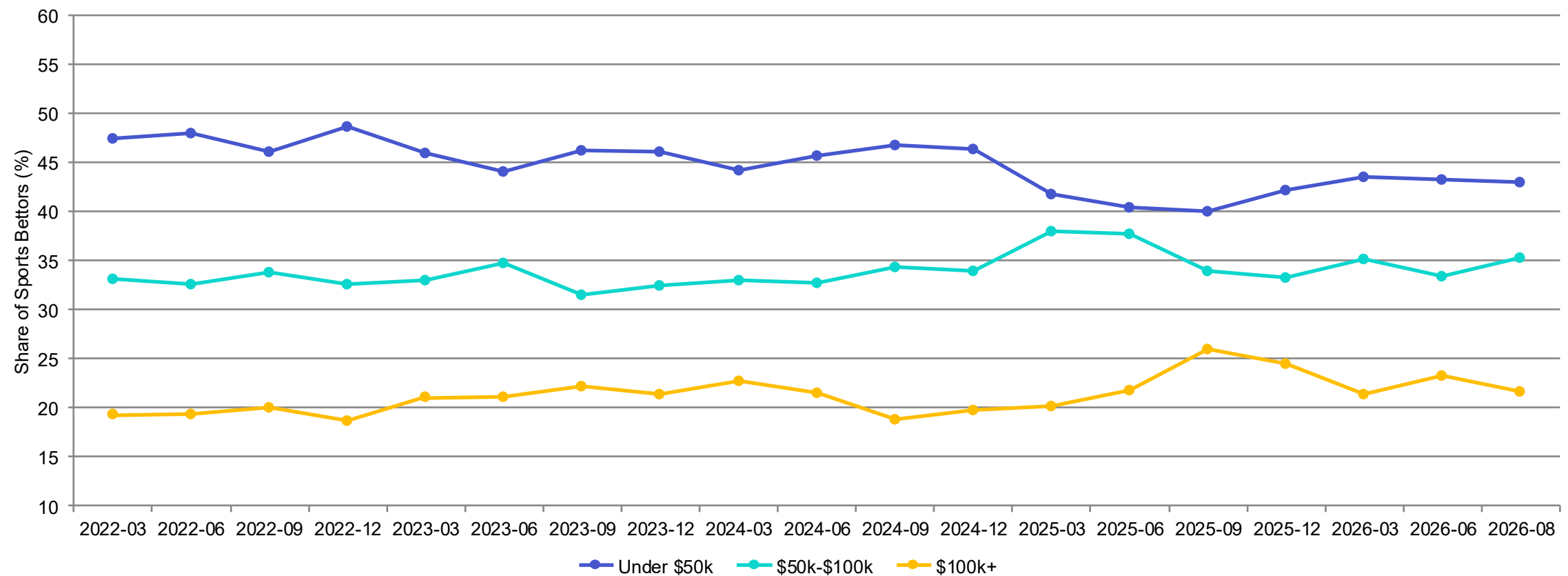


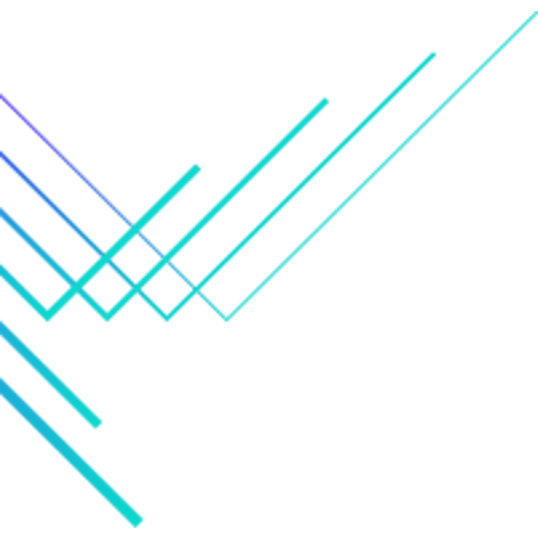
WHO THEY ARE

Income has drifted modestly higher within Sports Bettors over five years

The income mix within Sports Bettors has shifted modestly upward since 2022, with fewer under-\$50k households and slightly more \$50k+ households.

Quarterly income mix among Sports Bettors (21+), United States, Q1 2022 to Aug 18, 2026





Market & Economic Impact

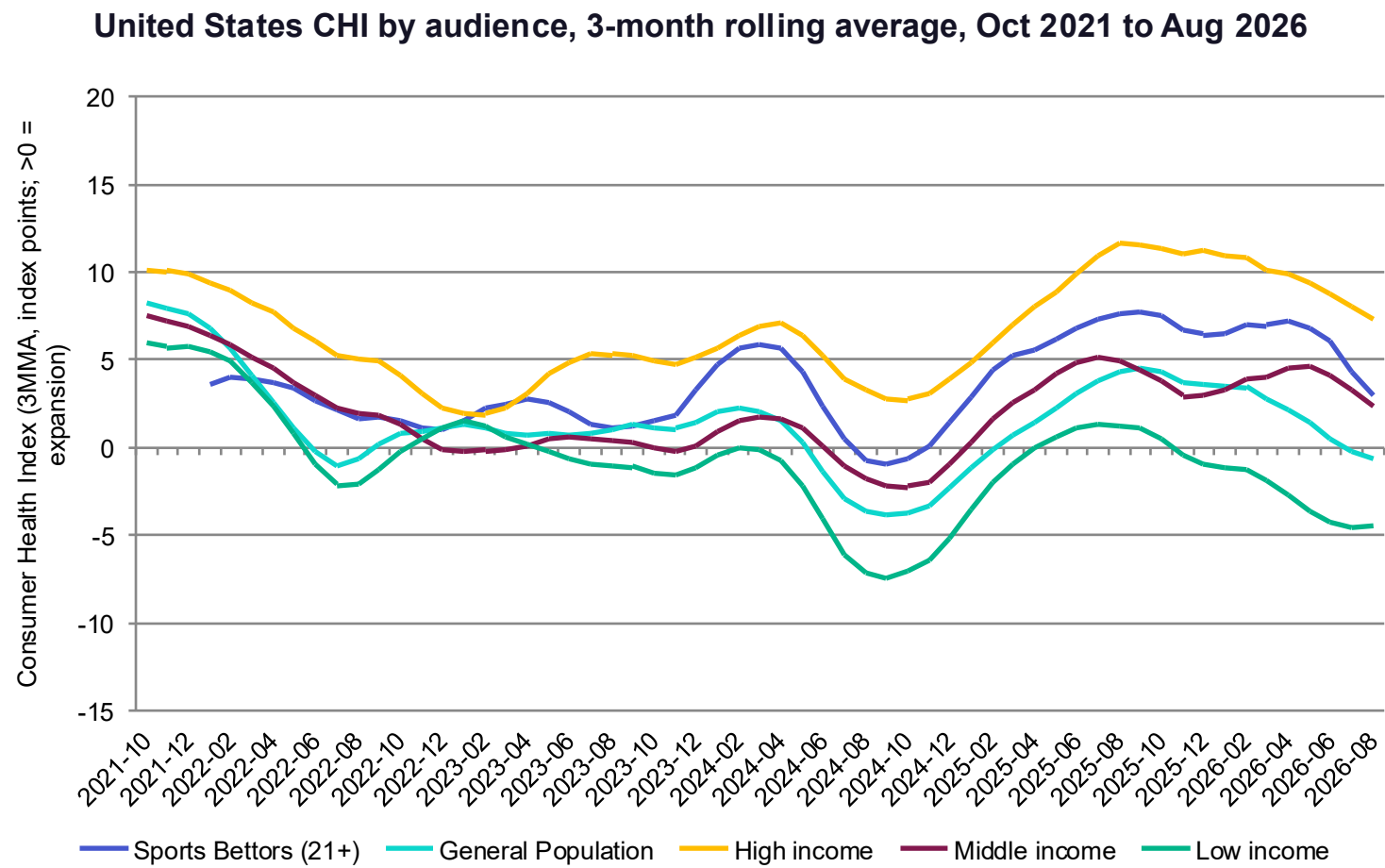
Demand among Sports Bettors remains stronger than average but has cooled in 2026

Sports Bettors show a stronger demand signal and healthier confidence than the headline, but 2026 brought broad cooling that increases the value of targeted planning.

- Near-term demand is stronger among Sports Bettors than among U.S. adults overall, even after a 2026 slowdown. Their Consumer Health Index (CHI) averages 6.0 year to date versus 1.6 for the general population, and the latest reading is about 3.0 versus -0.7. This points to comparatively better conditions for discretionary categories among Sports Bettors than in the mass market.
- Confidence remains higher for Sports Bettors, and their finances look less strained than the headline. The Index of Consumer Sentiment is 104 versus 90 for adults, while Personal Finances (Net better) is -7 points versus -21. This mix suggests intent is comparatively healthy, but recent cooling raises the importance of clear value.
- All groups softened in the last year, which makes targeting more important than broad-based spending assumptions. CHI, confidence, and household-finance measures all declined year over year for Sports Bettors and the general population. Leaders can expect more uneven demand by price tier and category.
- The macro backdrop is mixed and aligns with softer momentum. Inflation was 3.4% year over year in July 2026 and unemployment was 4.1%, while payroll employment declined by 23,000 ([Bureau of Labor Statistics Consumer Price Index release](#); [Bureau of Labor Statistics Employment Situation release](#)). Gasoline prices eased from recent highs, which can offer some near-term budget relief for commuting households ([Energy Information Administration weekly gasoline price series](#)).

CHI shows Sports Bettors in expansion while headline demand hovers near neutral

CHI shows Sports Bettors in expansion while the headline index has slipped slightly below zero.

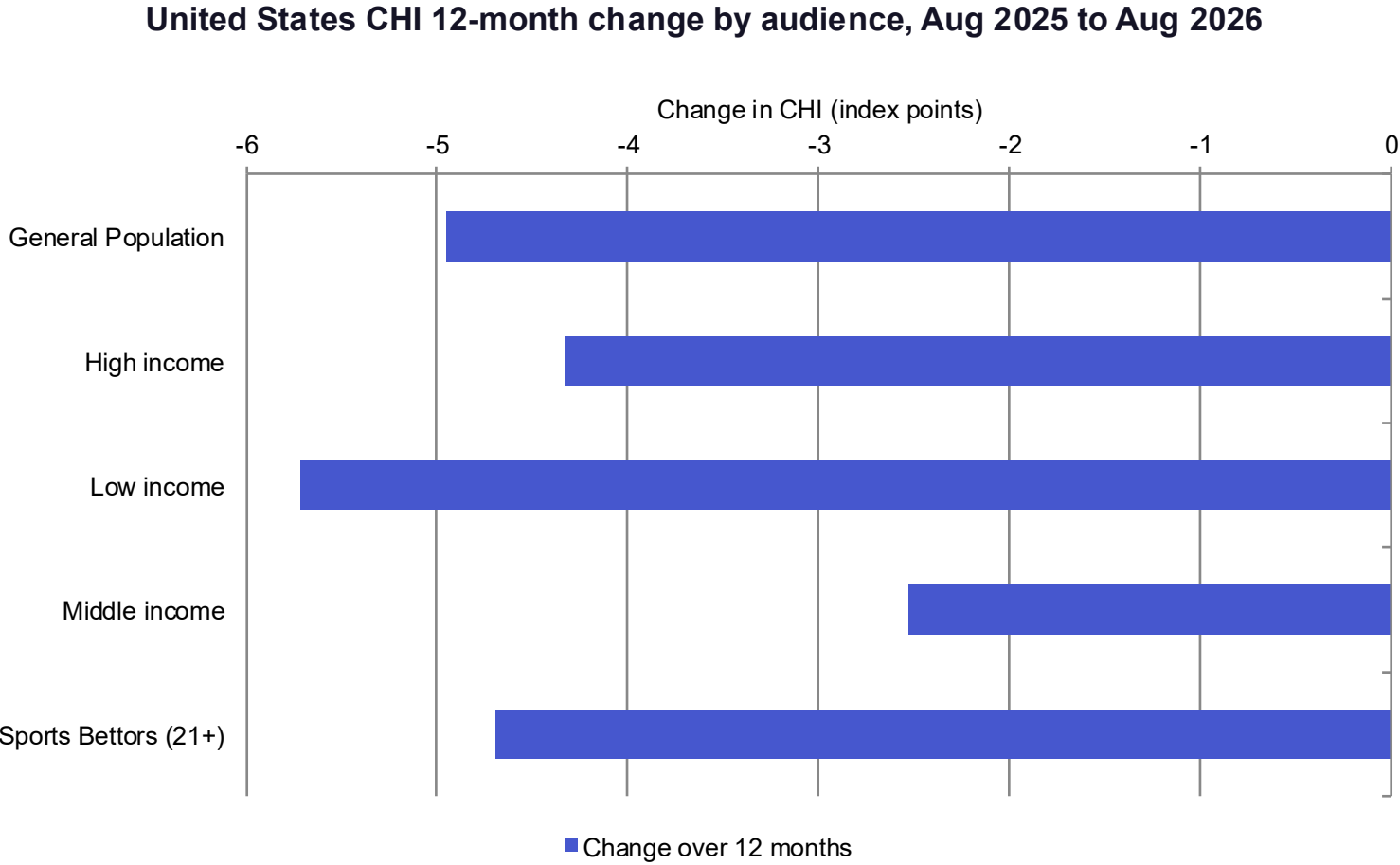


- Sports Bettors’ CHI stays above the general population and sits closer to middle- and high-income adults. The latest 3-month average is about 3.0 for Sports Bettors versus -0.7 for adults, while high income is near 7.3 and low income is near -4.5. This signals that demand conditions are more supportive for Sports Bettors than for the mass market.
- The decline since early 2026 shows that this audience is not immune to broader cooling. Leaders can treat Sports Bettors as comparatively resilient, while still planning for tighter decision-making on bigger or less essential purchases.

All groups cooled year over year; Sports Bettors still outpace the headline

Demand momentum softened year over year across every group, including Sports Bettors.

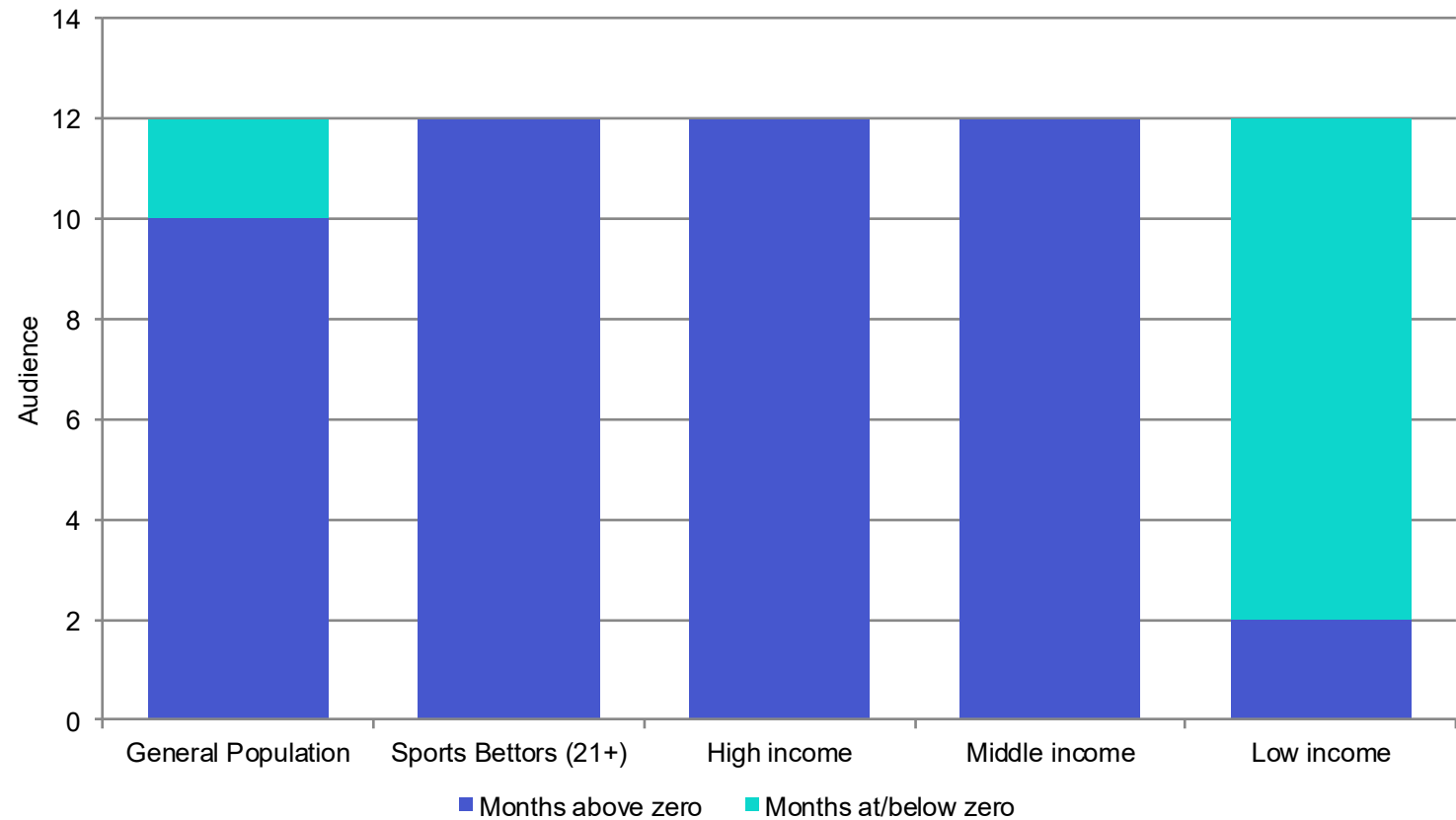
- CHI fell year over year for every group, including Sports Bettors (about -4.7 points). The general population declined by about -4.9, and low income declined by about -5.7. This broad pullback supports more cautious expectations for category growth than in 2025.
- Middle income saw the smallest decline (about -2.5), which suggests some stability in the “middle” of the market. Leaders can use this as context when setting price ladders and deciding where promotions are most likely to move volume.



Sports Bettors maintained consistent expansion across the last 12 months

Sports Bettors sustained expansion every month over the last year, unlike the general population and low-income adults.

United States CHI months above zero by audience, Sep 2025 to Aug 2026



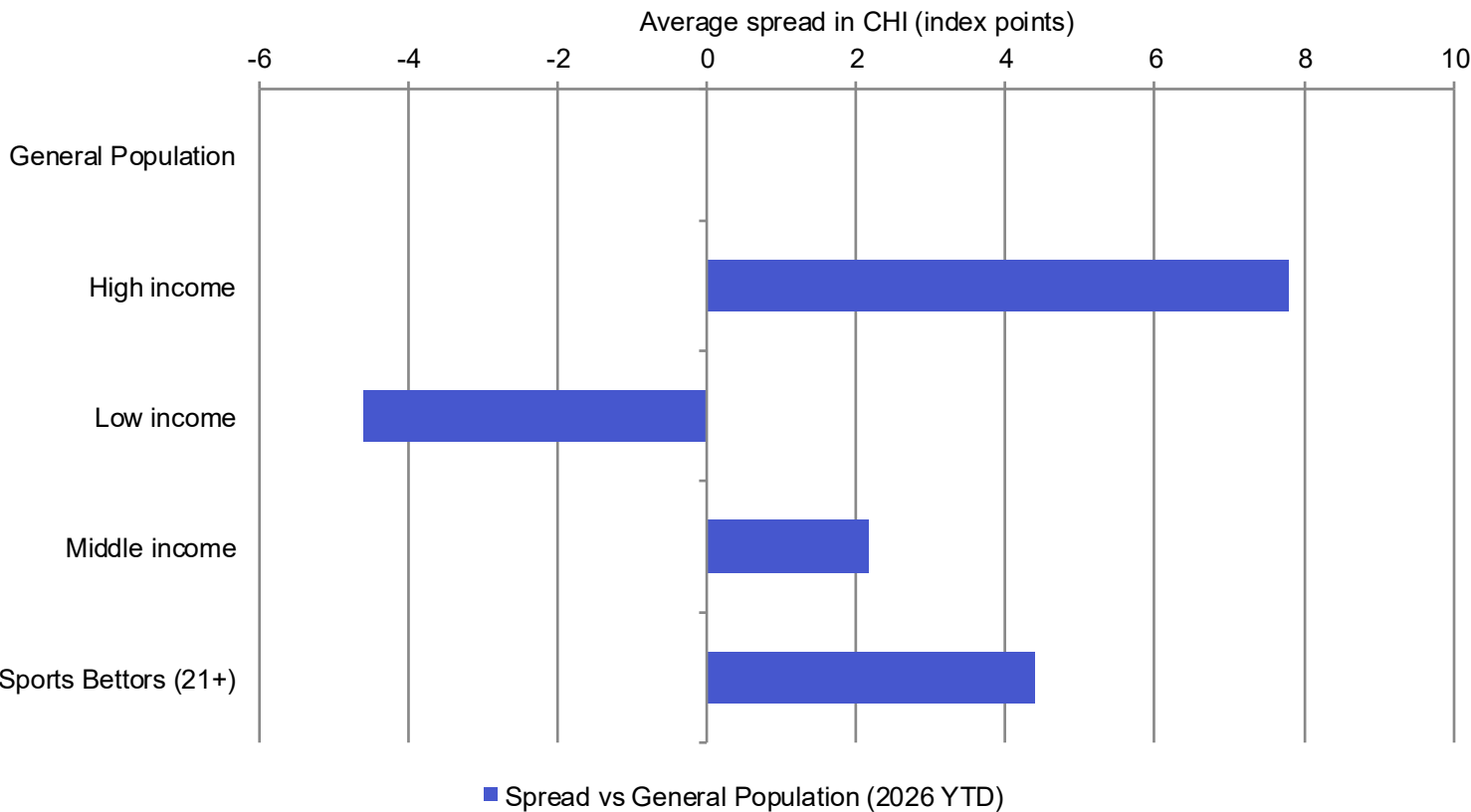
- Sports Bettors were in expansion in all 12 of the last 12 months, matching high- and middle-income adults. The general population was expansionary in 10 months, while low income was expansionary in only 2. This persistence shows where demand resilience is most concentrated.
- For planning, persistence matters as much as peak levels. Leaders can treat Sports Bettors as a steadier pool for discretionary demand while monitoring signs of further softening in the broader market.

Positive CHI differences in 2026 to date highlight demand resilience among Sports Bettors

Sports Bettors held a positive CHI difference versus the headline throughout 2026 to date.

- In 2026 to date, Sports Bettors average about 4.4 CHI points above the general population. High income averages about 7.8 points above, while low income averages about 4.6 points below. These gaps show where demand conditions are materially stronger or weaker than the headline.
- For business leaders, this kind of spread supports targeted investment decisions. It can also help teams align category bets and pricing with the audiences that show more durable demand capacity.

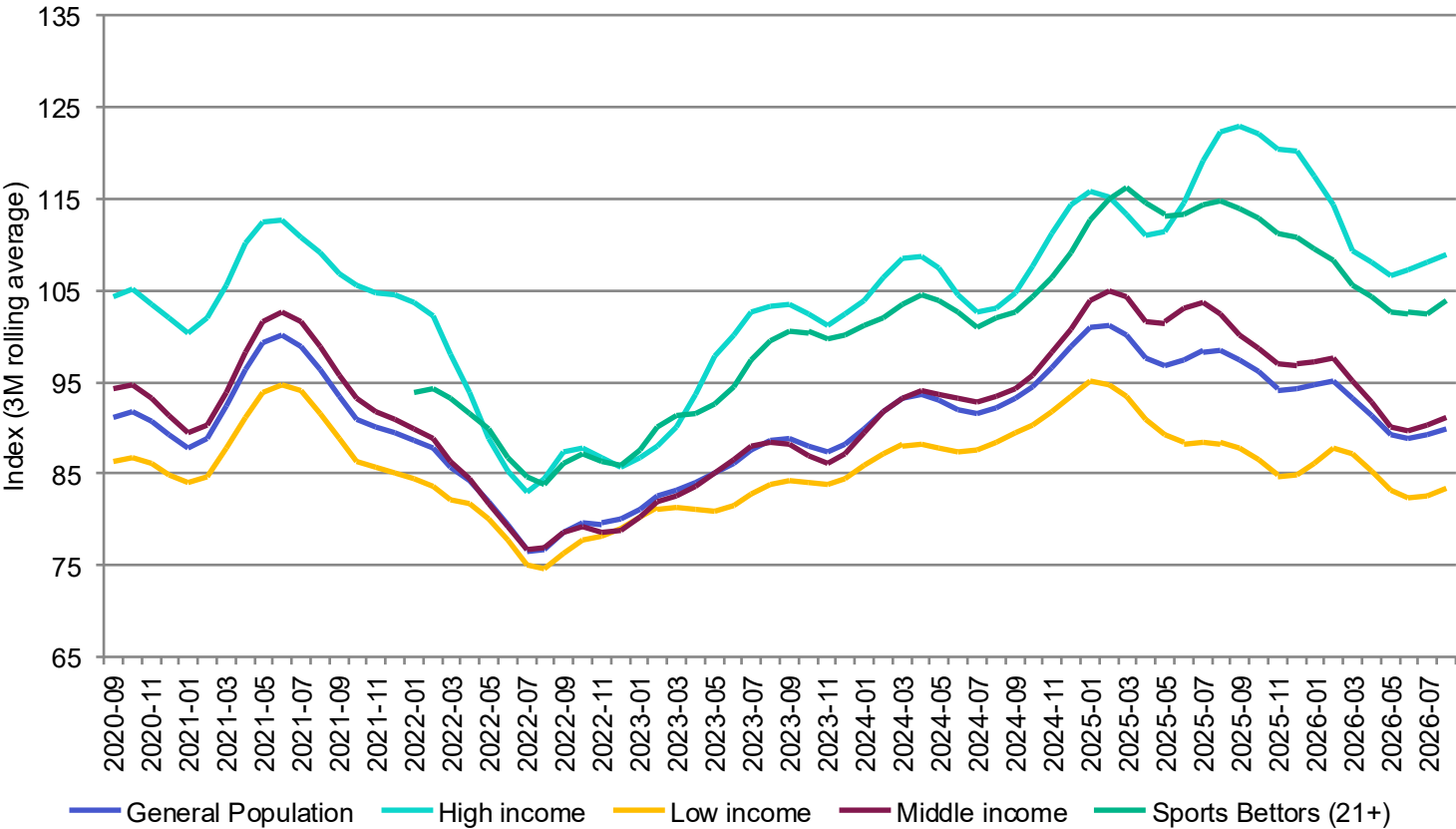
United States CHI average spread vs General Population, Jan 2026 to Aug 2026



Confidence remains elevated for Sports Bettors but has cooled alongside the market

Consumer confidence remains higher for Sports Bettors than for the headline, even after softening since early 2025.

Index of Consumer Sentiment, 3-month rolling average - United States, Sep 2020 to Aug 2026



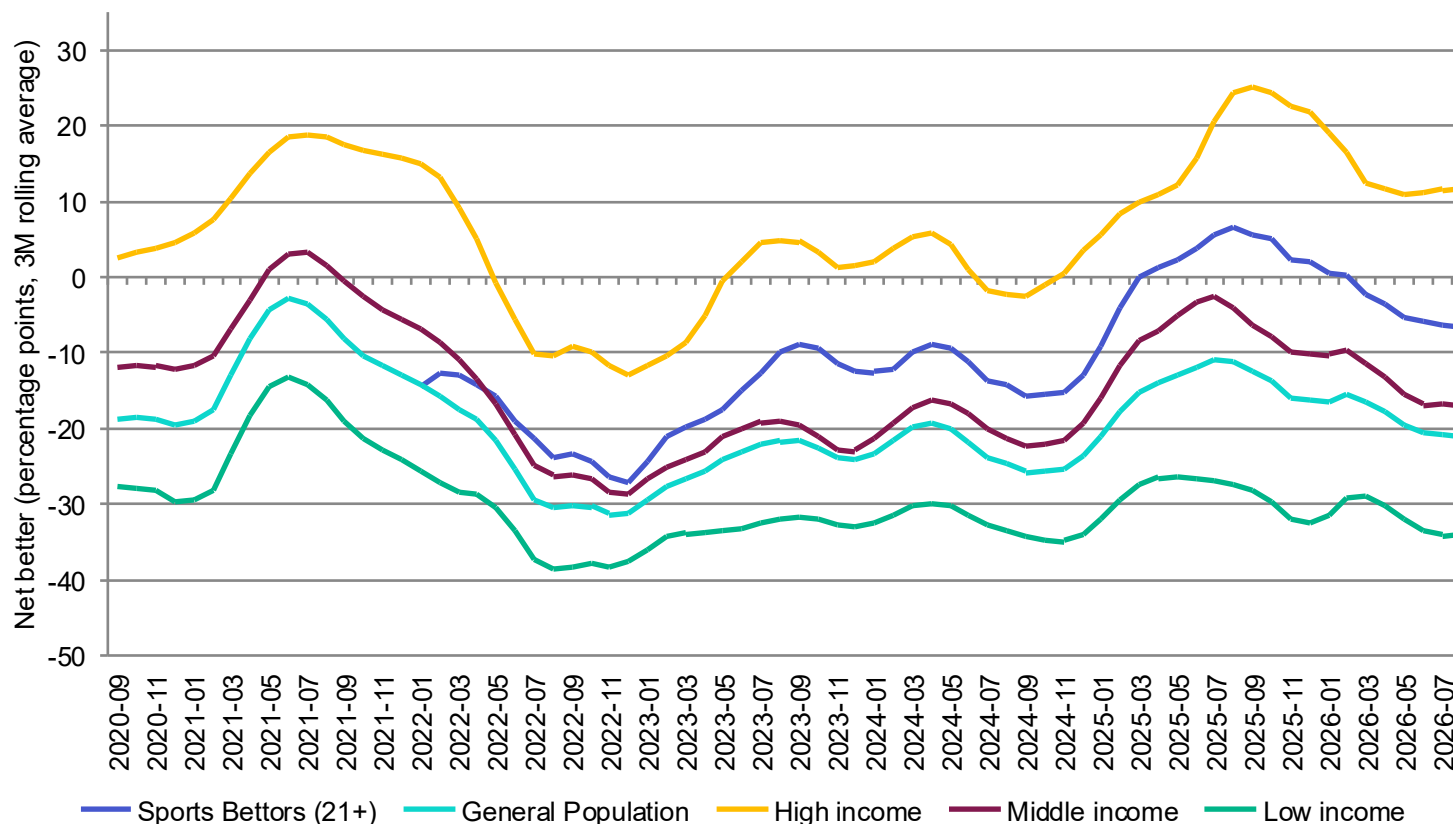
- Sports Bettors are consistently more confident than the general population. The latest 3-month average is about 104 for Sports Bettors versus 90 for adults, placing them closer to high-income households than to the headline. Higher confidence can support discretionary intent, especially in entertainment and travel.
- Confidence cooled from early 2025 highs across all groups. That cooling does not remove Sports Bettors’ relative advantage, but it can raise the bar for “nice-to-have” purchases without clear payoff.

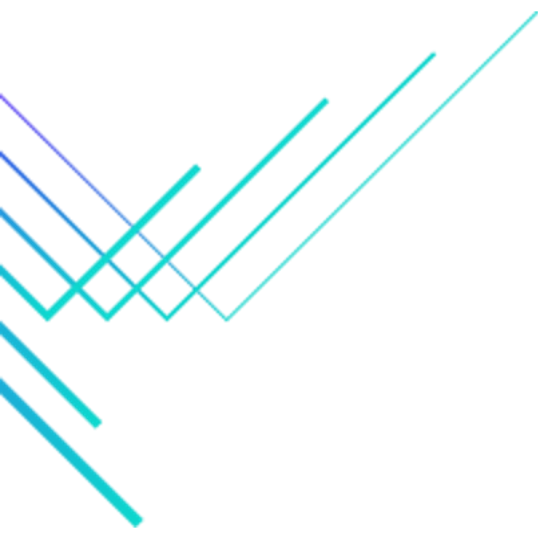
Finances are comparatively sturdier for Sports Bettors, though trending down

Sports Bettors' household finances are less negative than the headline, but 2026 shows a clear downshift.

- Sports Bettors report less negative household-finance conditions than the general population. Net better is about -7 points for Sports Bettors versus -21 for adults, while high income is positive at about +12. This suggests Sports Bettors have more room to spend than the mass market, even as finances remain net negative.
- Household finances also cooled year over year for Sports Bettors and the general population. With inflation still above pre-2021 norms and job growth softer, offers that clearly explain value can help convert interest into purchases ([Bureau of Labor Statistics Consumer Price Index release](#); [Bureau of Labor Statistics Employment Situation release](#)).

Personal Finances: Current Conditions - Net better (rebased), 3-month rolling average - United States, Sep 2020 to Aug 2026





How They Live

Digital money movement, social commerce, and active leisure set Sports Bettors apart

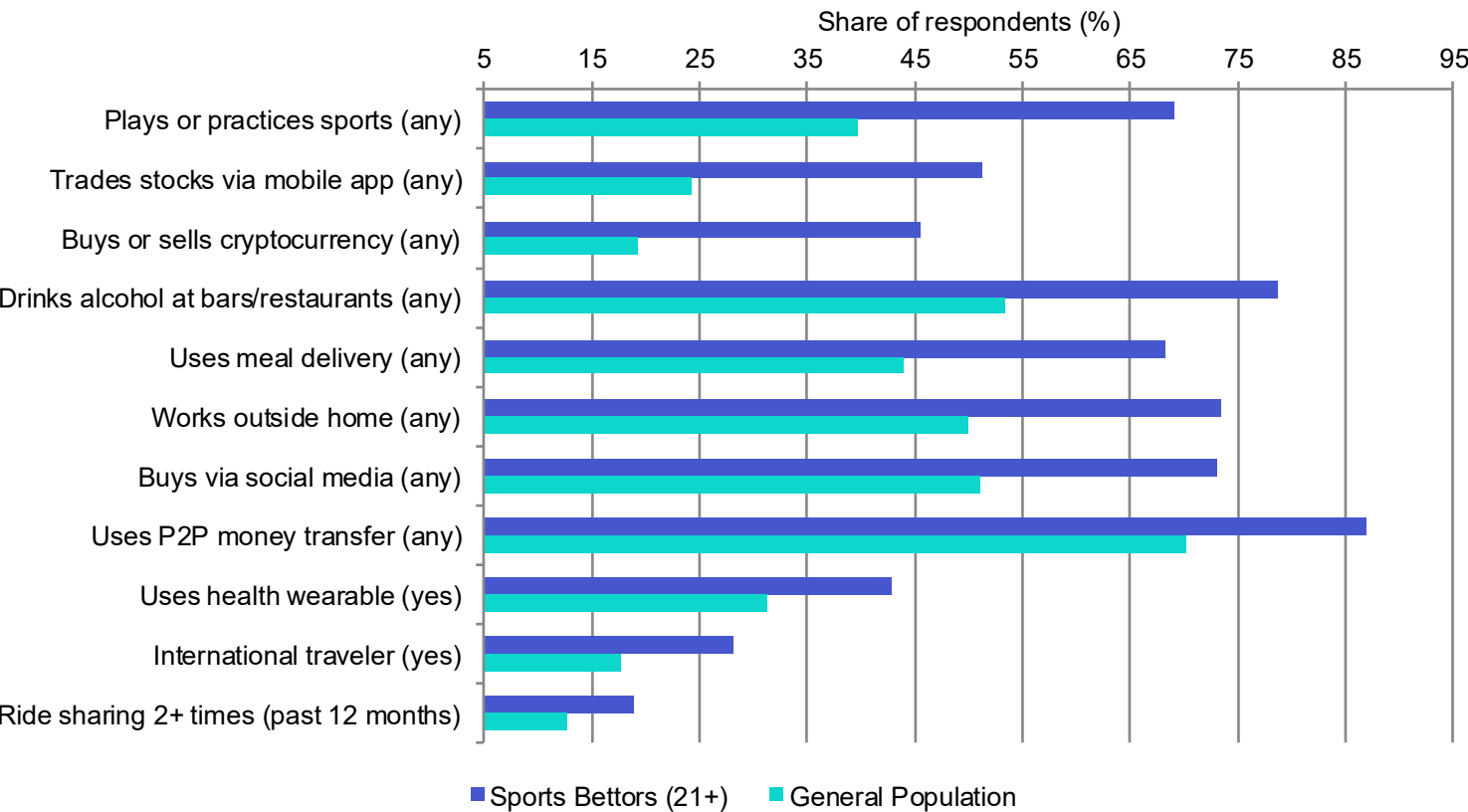
Sports Bettors lead on app-based commerce and payments, out-of-home socializing and travel, and active leisure; some gaps narrowed as tools went mainstream, but the biggest differences remain.

- Sports Bettors are heavy users of app-based money movement and digital shopping. In the last year, 87% used person-to-person transfers versus 70% of adults, and 73% bought through social media versus 51%. This creates frequent opportunities to reach them close to a purchase decision.
- Convenience services are more common, including meal delivery at 68% versus 44% of adults. This supports offers that reduce friction and reward repeat purchasing behavior.
- Out-of-home activity is meaningfully higher. Seventy-nine percent drank at bars or restaurants versus 53% of adults, and they report higher ride share and hotel-stay frequency. These patterns add high-value occasions in dining, nightlife, and travel.
- Active lifestyles and market participation stand out. Sixty-nine percent practiced or played sports versus 40% of adults, and 51 % traded stocks via a mobile app versus 24%, with crypto at 45% versus 19%. These durable differences help identify long-running contexts for relevance.

App-based finance, social buying, and out-of-home activity are standout behaviors

App-based finance and commerce, plus heavier out-of-home activity, create more frequent touchpoints than in the mass market.

Defining Behaviors in the Last 12 Months (Aug 2025 to Aug 2026), United States

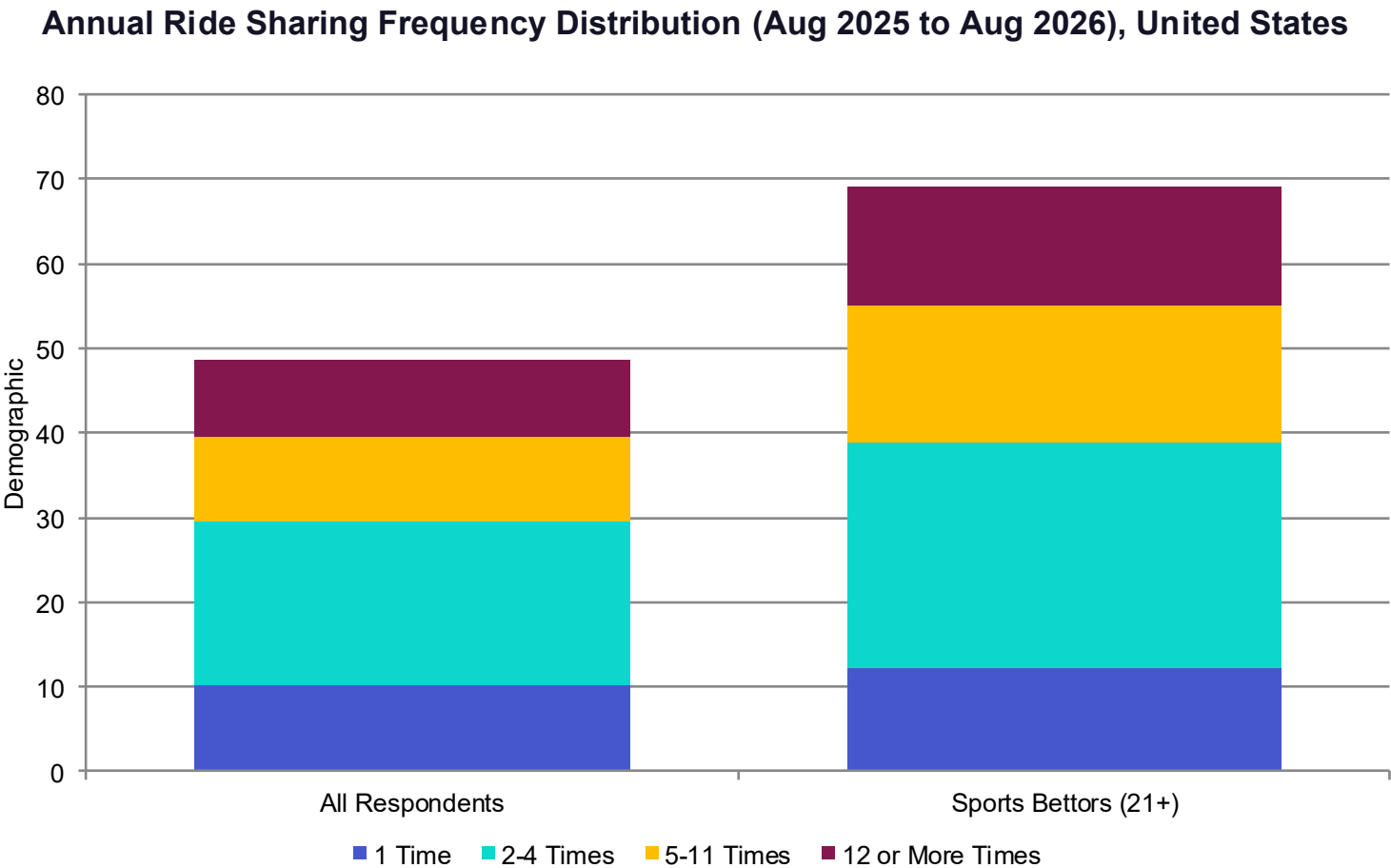


- Digital purchasing and payments are more common among Sports Bettors than among adults overall. Person-to-person payments reach 87% versus 70%, social buying reaches 73% versus 51%, and meal delivery reaches 68% versus 44%. These behaviors increase the number of “in-the-moment” touchpoints where offers and reminders can matter.
- Out-of-home spending occasions are also more frequent. Drinking at bars/restaurants reaches 79% versus 53%, and mobile stock trading reaches 51% versus 24%. Leaders can view this combination as a signal of both time out of home and comfort with app-based transactions.

Mobility and travel frequency run higher among Sports Bettors

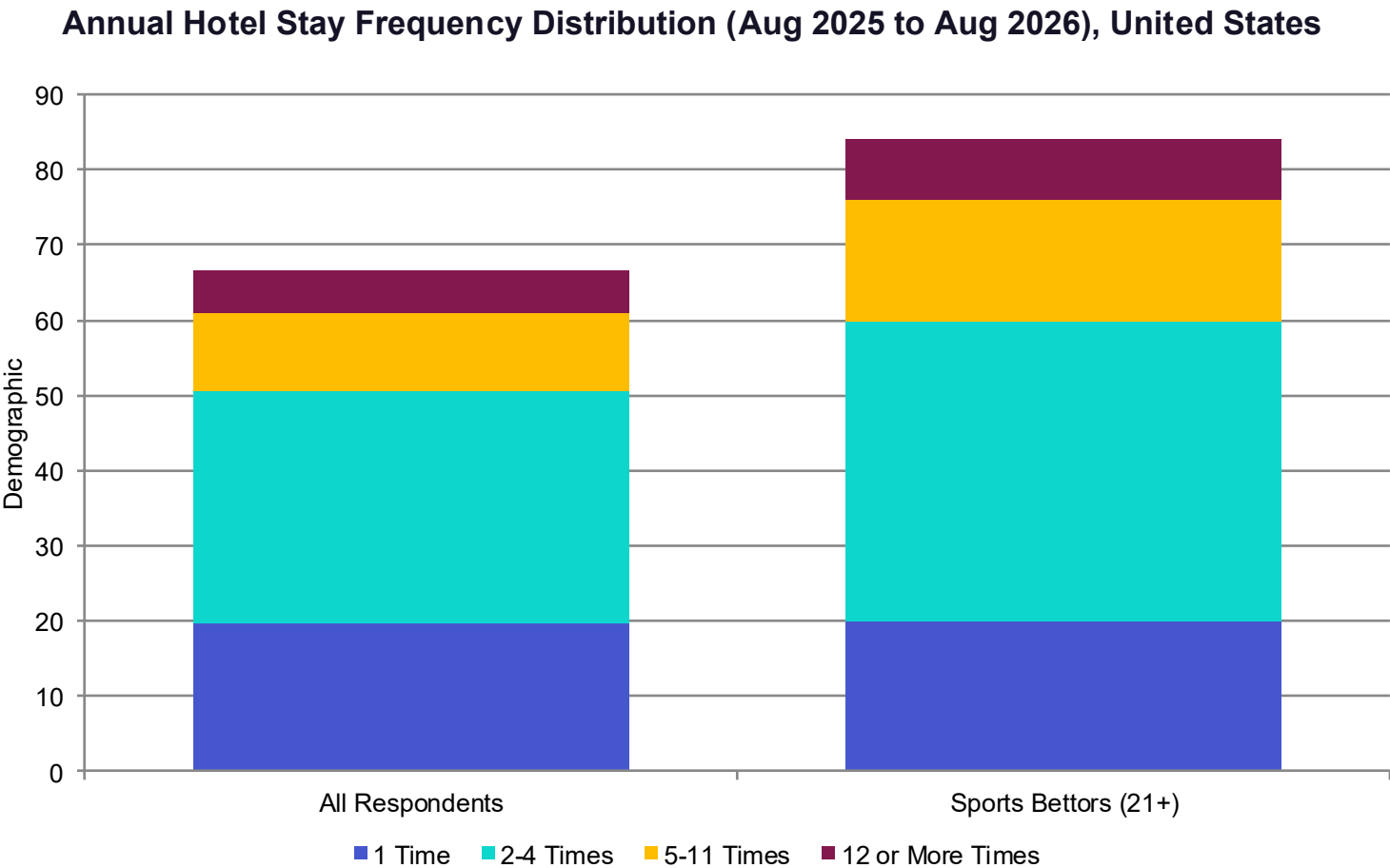
Ride share frequency skews higher for Sports Bettors, signaling more on-demand mobility and event-linked movement.

- Sports Bettors use ride sharing more often than adults overall, with larger shares in the 2–4, 5–11, and 12+ annual-use bands. Higher frequency use increases exposure to entertainment districts and event-driven travel. It also makes app-based promotions more practical.
- These mobility patterns pair naturally with sports calendars. Offers tied to game days, weekend travel, and nightlife can align with when many Sports Bettors are already on the move.



Frequent hotel stays create repeated opportunities for loyalty and upsell

Hotel stays cluster at higher annual frequencies for Sports Bettors than for the general population.

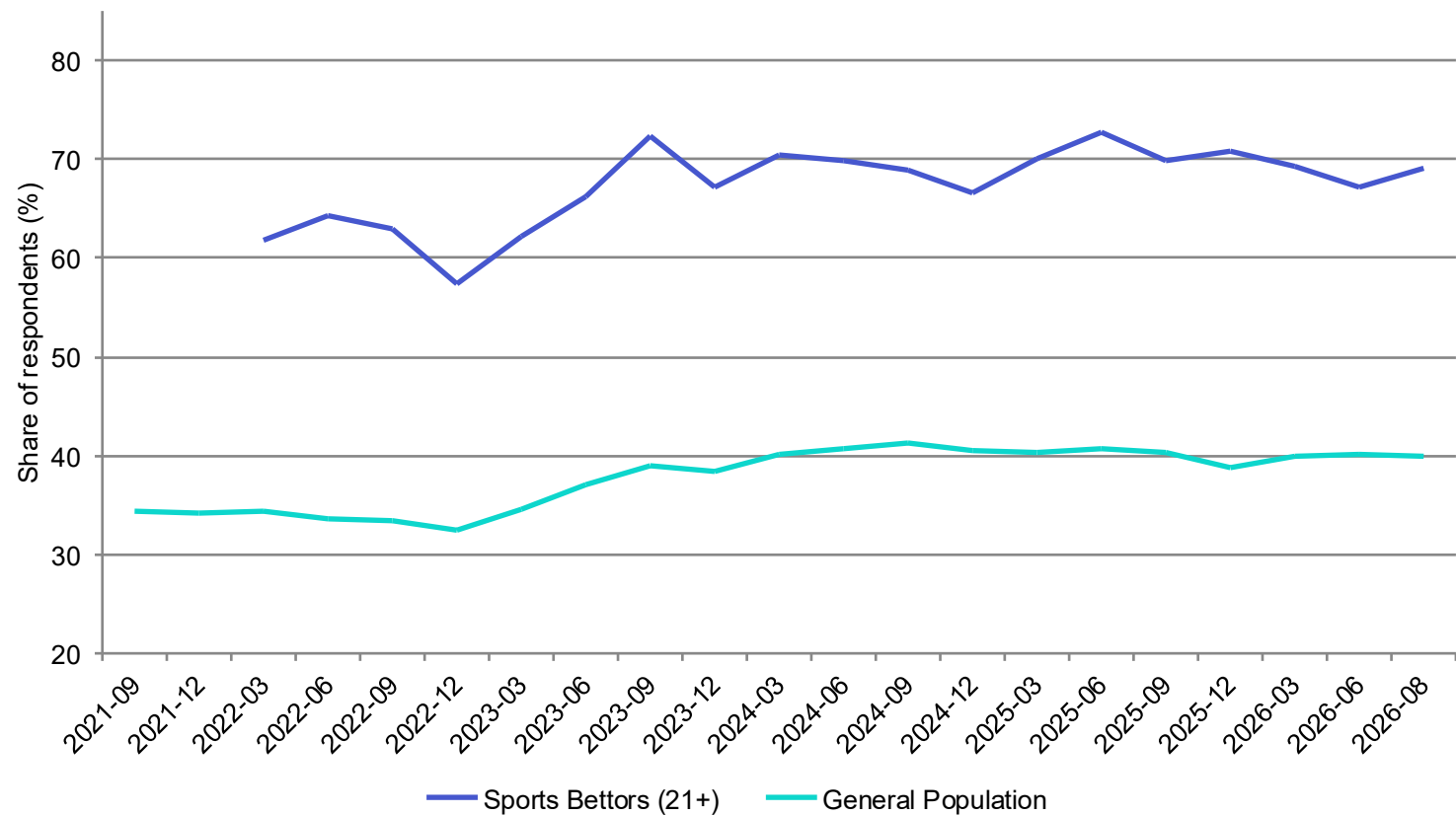


- Sports Bettors are more likely than adults overall to report multiple hotel stays in the past year. Larger shares fall in the 2–4 and 5–11 stay bands, which points to more repeatable travel occasions. These are moments where upgrades and add-ons can matter.
- Higher travel frequency supports relationship-building, not just one-off purchases. Loyalty benefits and simple booking experiences can align with how these consumers travel.

Active sports participation remains a defining, stable behavior

Sports participation stays high for Sports Bettors across the period, reinforcing a durable lifestyle anchor.

Trend: Plays or practices sports (any), Q3 2021 to Q3 2026 (quarterly), United States



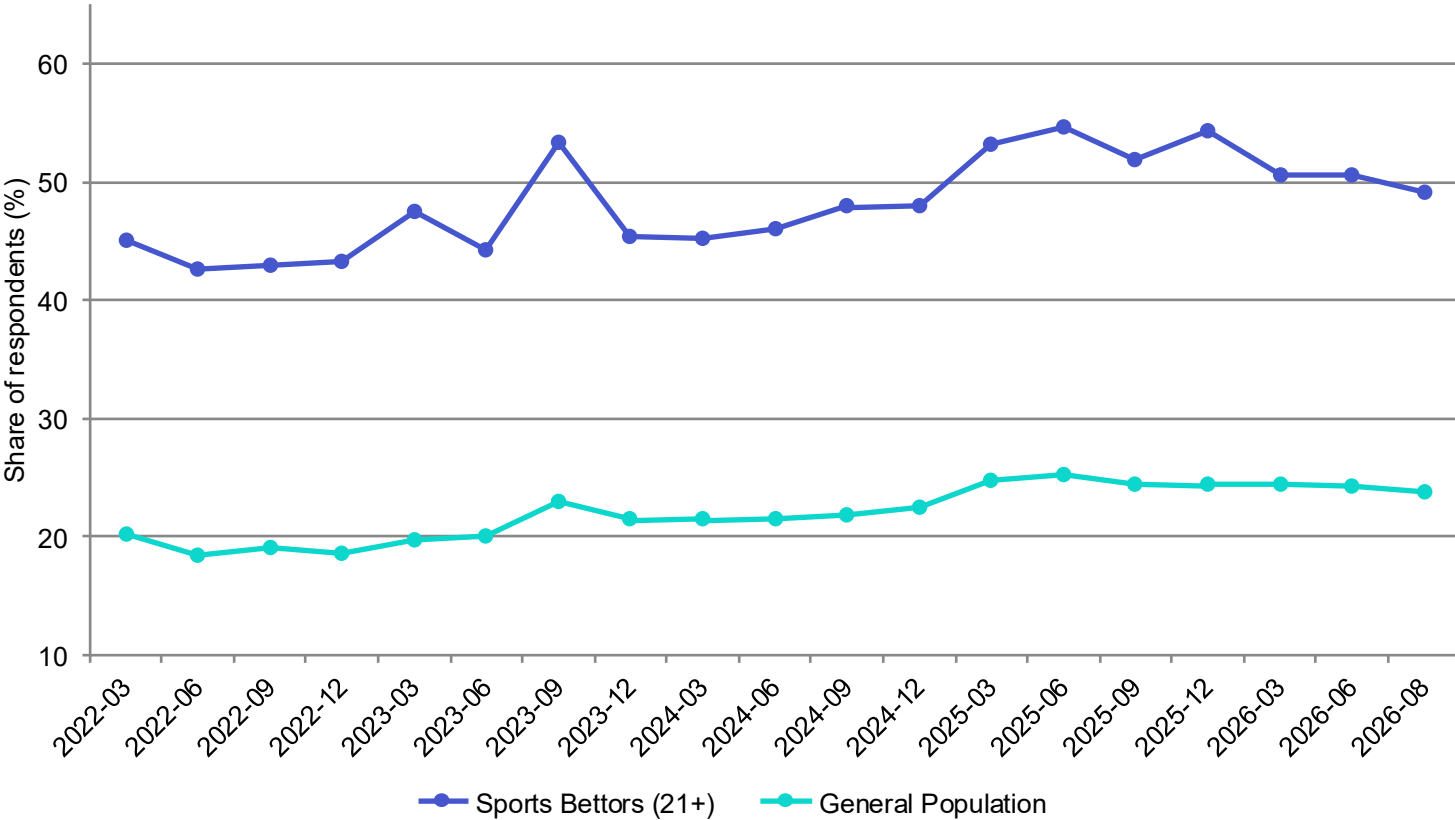
- Sports participation is consistently higher among Sports Bettors than among adults overall. Over the five-year window, Sports Bettors generally sit in the low-to-high 60s, while the general population is around 40%. This makes sports and fitness a reliable context for relevance.
- Because the gap is steady, this is not just a short-term swing. Leaders can plan for year-round opportunities in sports, fitness, and wellness messaging for this audience.

Mobile investing remains a durable differentiator for Sports Bettors

Mobile investing stays structurally higher among Sports Bettors than among adults overall.

- Mobile stock trading remains much more common among Sports Bettors than among adults overall. In the current period, 51% report trading stocks through a mobile app versus 24% of adults. This points to higher comfort with financial apps and real-time updates.
- For financial brands, the opportunity is not only acquisition. Products that simplify decision-making and clearly explain tradeoffs can fit a group that already uses app-based finance tools more often.

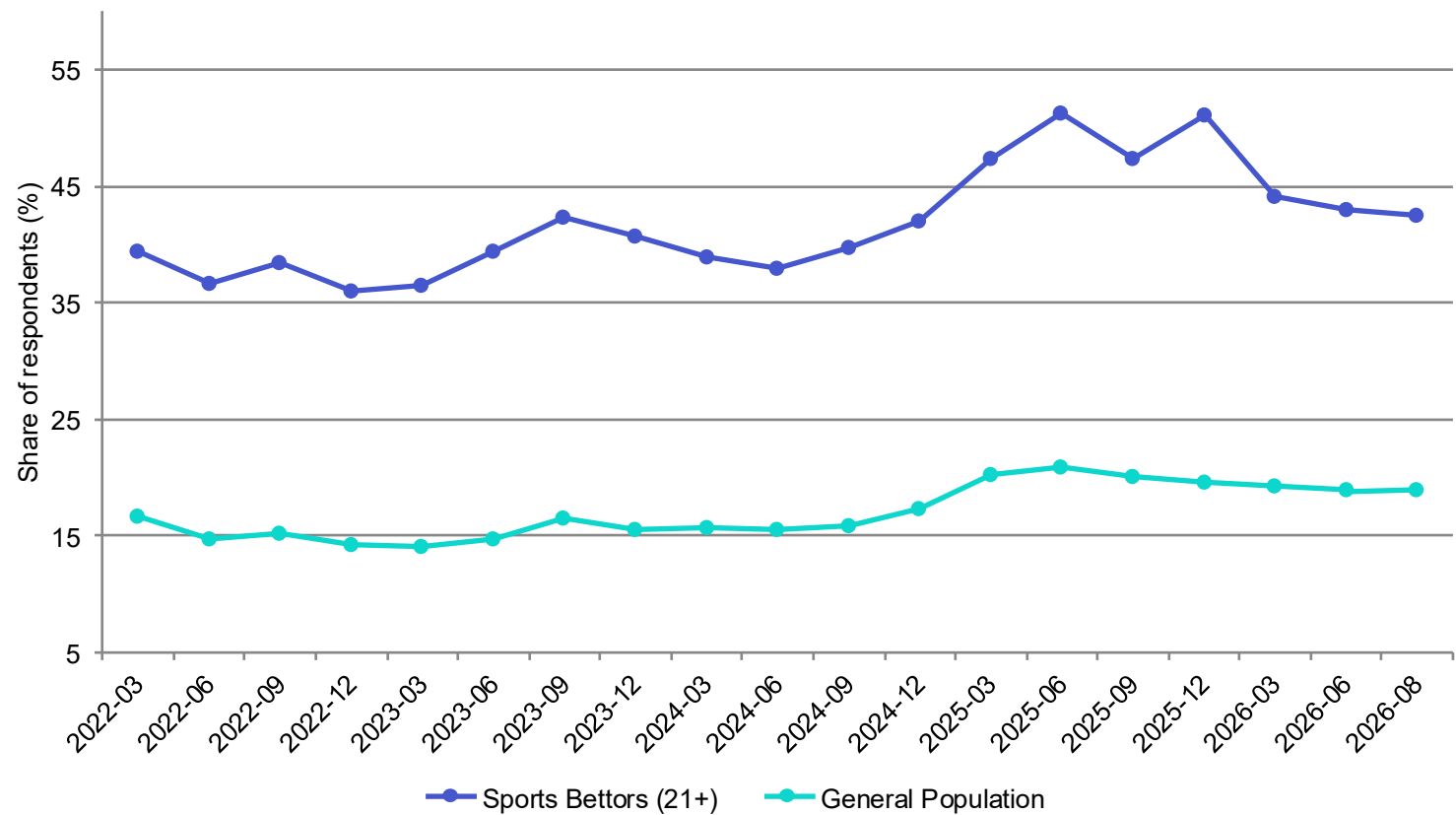
Trend: Trades stocks via mobile app (any), Q3 2021 to Q3 2026 (quarterly), United States



Crypto exposure remains elevated, shaping how Sports Bettors may evaluate risk and rewards

Crypto participation among Sports Bettors remains far above the national average over time.

Trend: Buys or sells cryptocurrency (any), Q3 2021 to Q3 2026 (quarterly), United States



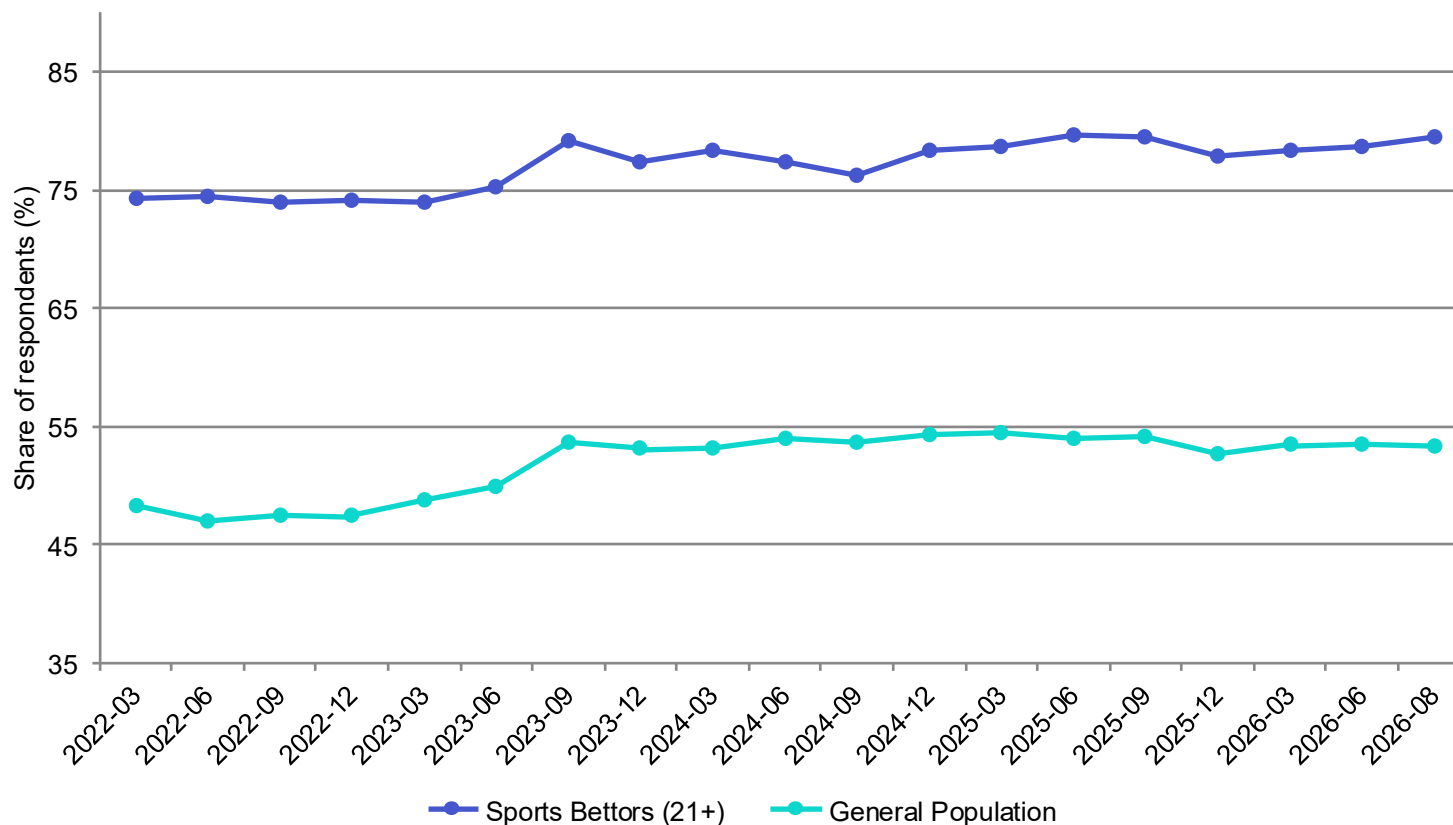
- Crypto buying and selling is consistently higher among Sports Bettors than among adults overall. In the current period, 45% report crypto participation versus 19% of adults. This implies broader exposure to digital-asset ecosystems and market volatility.
- That exposure can change how people evaluate risk and rewards. Clear terms, responsible messaging, and straightforward education can help brands connect without assuming deep expertise.

Out-of-home dining and drinking remain high-frequency occasions for Sports Bettors

Out-of-home food and beverage occasions are consistently more common among Sports Bettors than among adults overall.

- Drinking at bars and restaurants is far more common among Sports Bettors than among adults overall. In the current period, 79% report doing so versus 53% of adults. This creates strong evening and weekend opportunities for dining and nightlife categories.
- The gap also signals more time spent out of home. Brands with local footprints can align messaging with game nights, paydays, and seasonal sports moments.

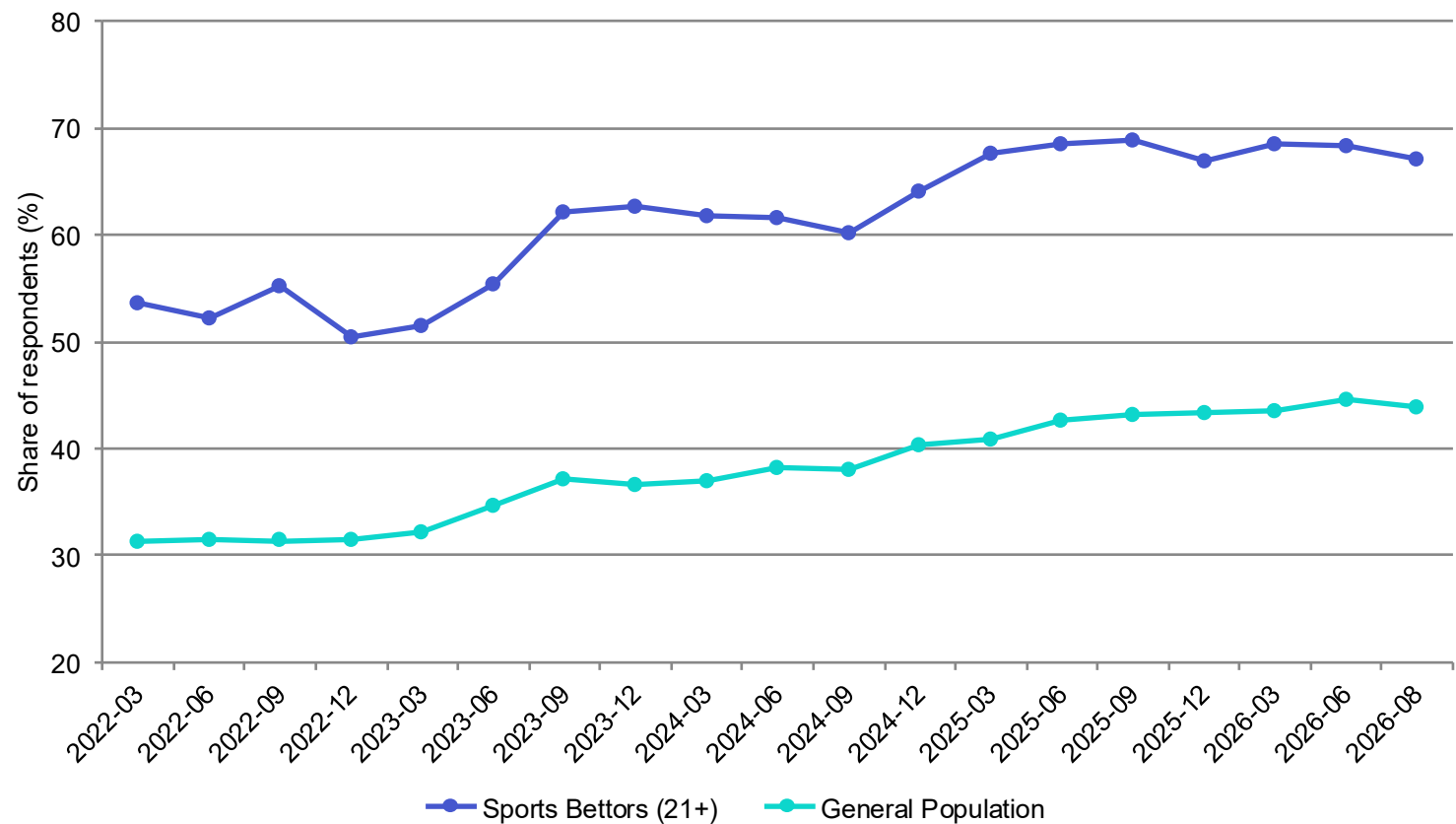
Trend: Drinks alcohol at bars/restaurants (any), Q3 2021 to Q3 2026 (quarterly), United States



Delivery stays elevated among Sports Bettors, supporting repeatable app-based offers

Meal delivery use remains elevated among Sports Bettors, supporting repeatable app-based promotions.

Trend: Uses meal delivery (any), Q3 2021 to Q3 2026 (quarterly), United States



- Meal delivery usage remains higher among Sports Bettors than among adults overall. In the current period, 68% report using meal delivery versus 44% of adults. This supports app-native offers and simple loyalty mechanics that reward repeat ordering.
- Because delivery is already common for this audience, execution details matter. Clear fees, fast re-order, and relevant add-ons can help protect frequency when budgets tighten.

International travel is more common among Sports Bettors, adding premium spending occasions

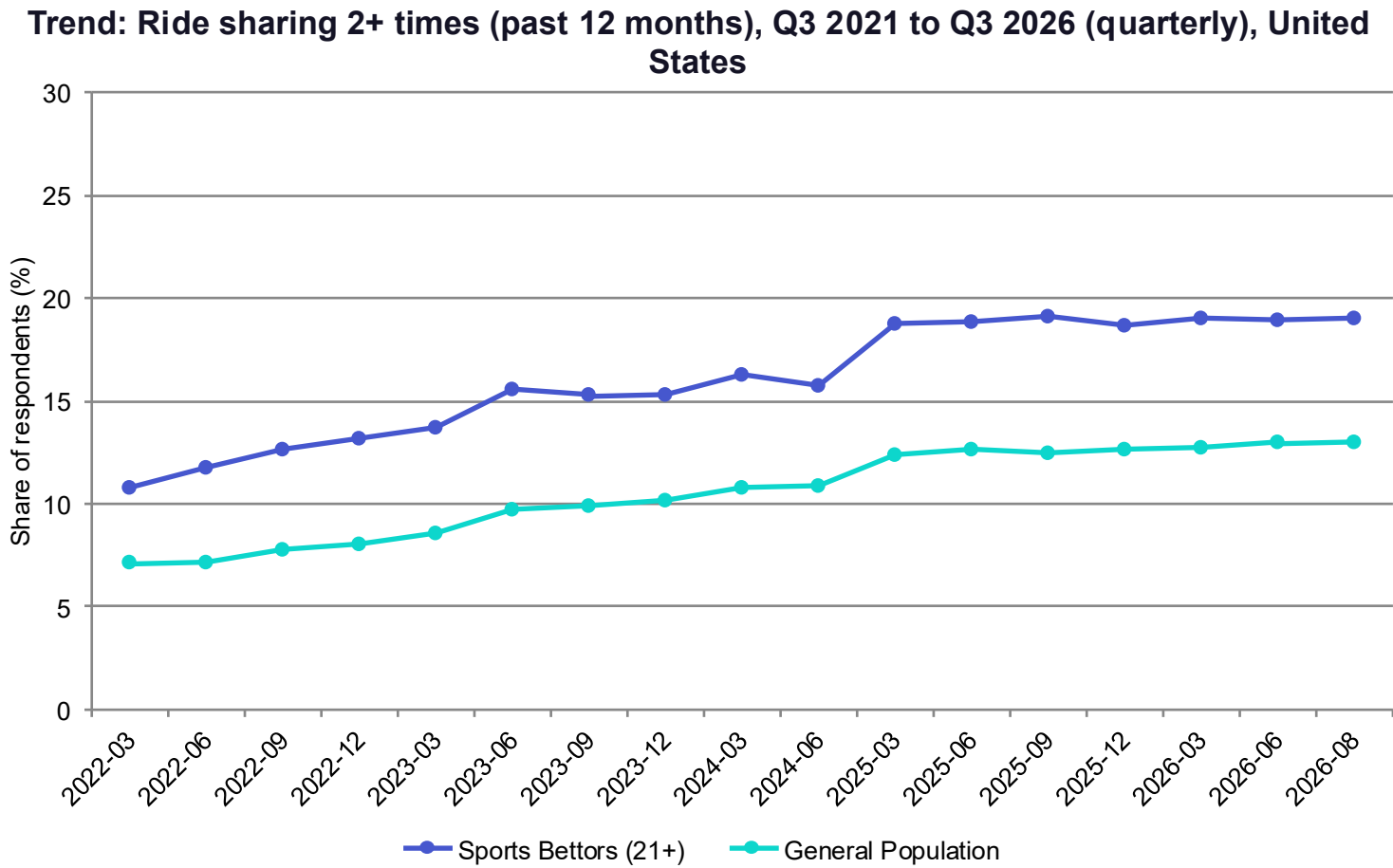
International travel participation has grown and remains higher among Sports Bettors than among adults overall.

- International travel is more common among Sports Bettors than among adults overall. In the current period, 28% report traveling internationally versus 18% of adults. This expands relevant purchase occasions into airports, foreign transaction spending, and travel planning.
- Higher travel rates also support relationship-based strategies. Travel rewards, partnerships, and service features that reduce hassle can fit an audience that travels more often.



Heavier ride share use adds high-intent, event-linked moments

Ride share intensity is higher among Sports Bettors, expanding on-the-go touchpoints.

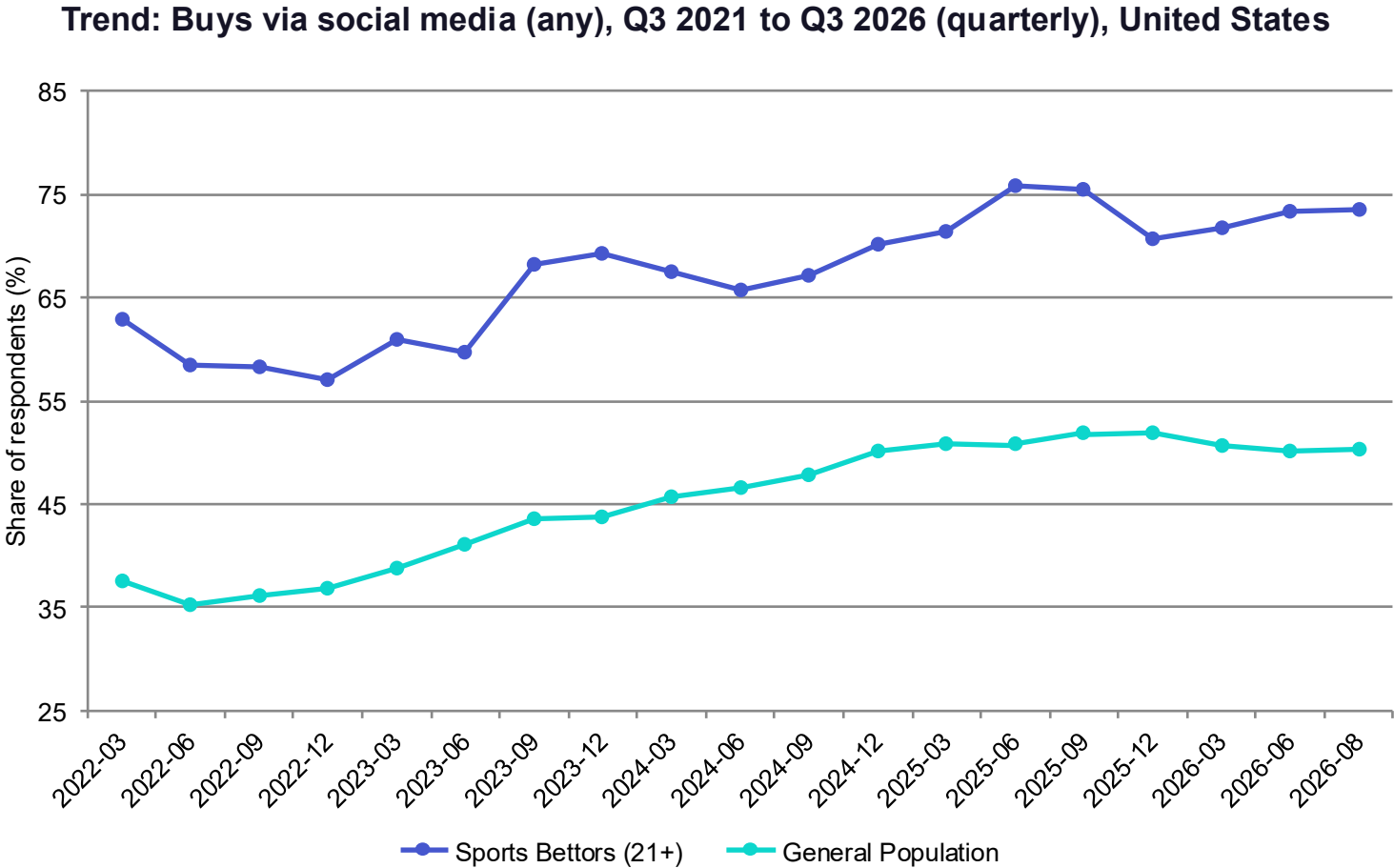


- Ride share intensity is higher for Sports Bettors than for adults overall and has risen over time. In the current period, 19% report using ride share 2+ times versus 13% of adults. That suggests more frequent event-linked movement and less reliance on personal driving for nights out.
- Mobility moments are also measurable moments. App-based offers and event-timed reminders can align with when consumers are already making transportation decisions.

Social buying remains high among Sports Bettors, supporting shoppable content and offers

Social buying remains far more common among Sports Bettors than among adults overall.

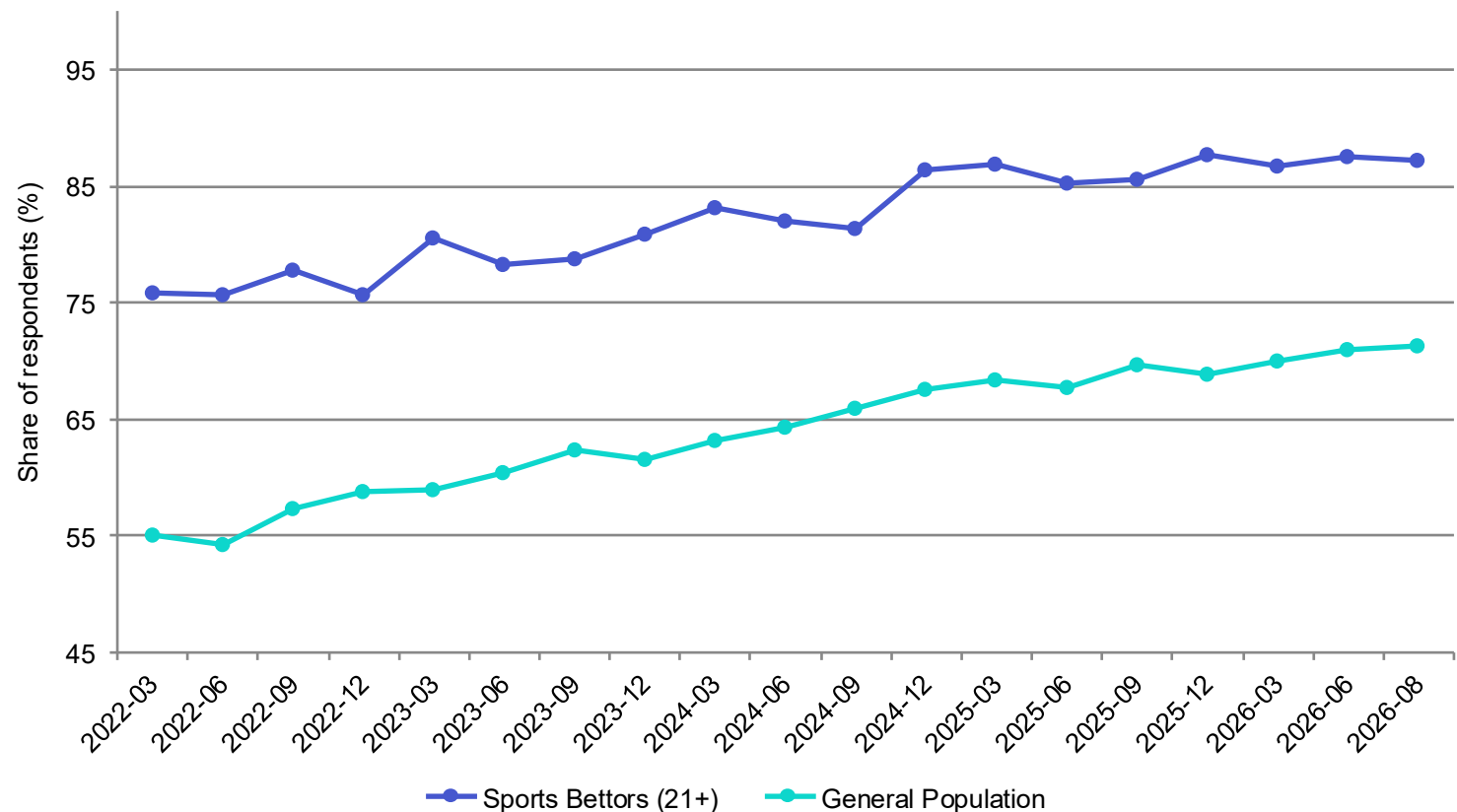
- Buying through social media is significantly more common among Sports Bettors than among adults overall. In the current period, 73% report buying via social media versus 51% of adults. This keeps social platforms central to both discovery and checkout.
- As more adults adopt social buying, the gap can narrow even when Sports Bettors stay high. Leaders can focus on durable differentiators like sports content adjacency and live-event timing to keep social work efficient.



P2P transfers support fast, low-friction experiences for Sports Bettors

P2P transfer usage remains exceptionally high among Sports Bettors, reinforcing a low-friction payment norm.

Trend: Uses P2P money transfer (any), Q3 2021 to Q3 2026 (quarterly), United States

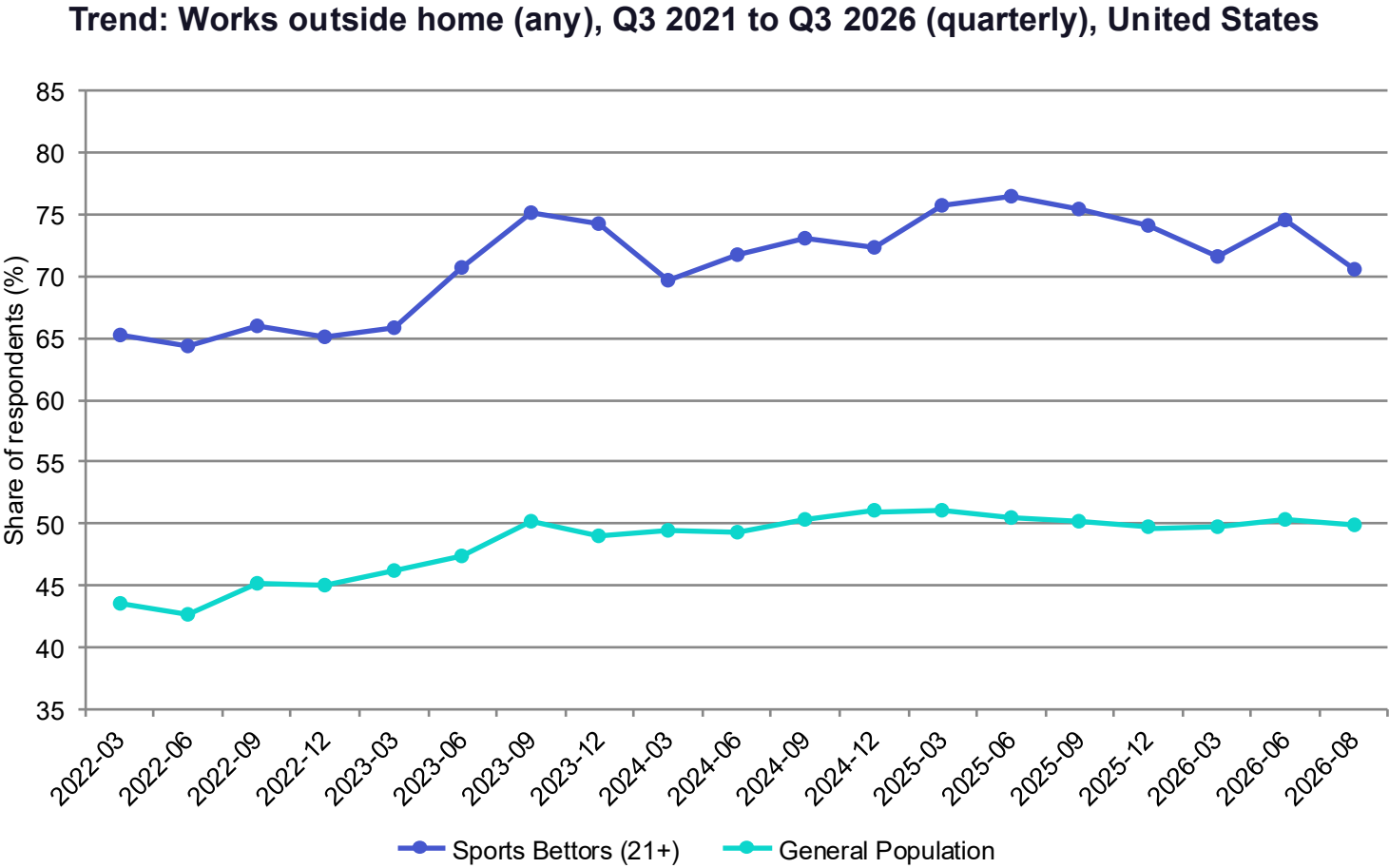


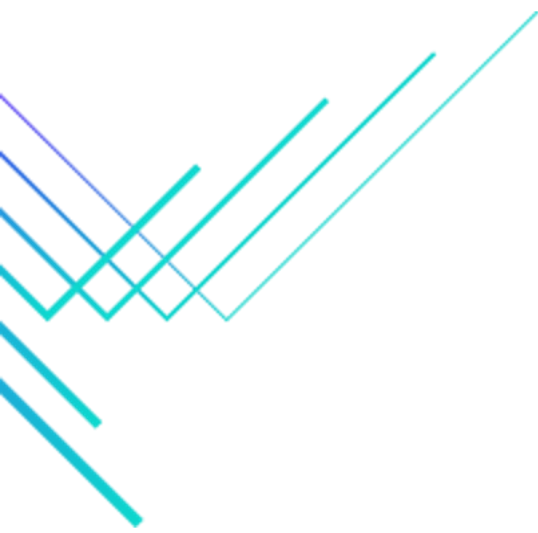
- Person-to-person money transfer use is nearly universal among Sports Bettors and remains meaningfully higher than among adults overall. In the current period, 87% report using P2P versus 70% of adults. That makes fast, app-based money movement a realistic default for many in this audience.
- Friction matters more when speed is the expectation. Simple checkout and instant reward mechanics can align with how these consumers already move money.

Weekday, in-person routines add everyday demand moments for Sports Bettors

In-person work is more common among Sports Bettors, supporting weekday out-of-home purchase occasions.

- Working outside the home is more common among Sports Bettors than among adults overall. In the current period, 73% report working outside the home versus 50% of adults. In-person routines add weekday purchase occasions tied to commuting and lunch breaks.
- That weekday pattern complements weekend sports peaks. Leaders can plan for both steady weekday demand and concentrated event moments.





How They Engage With Media

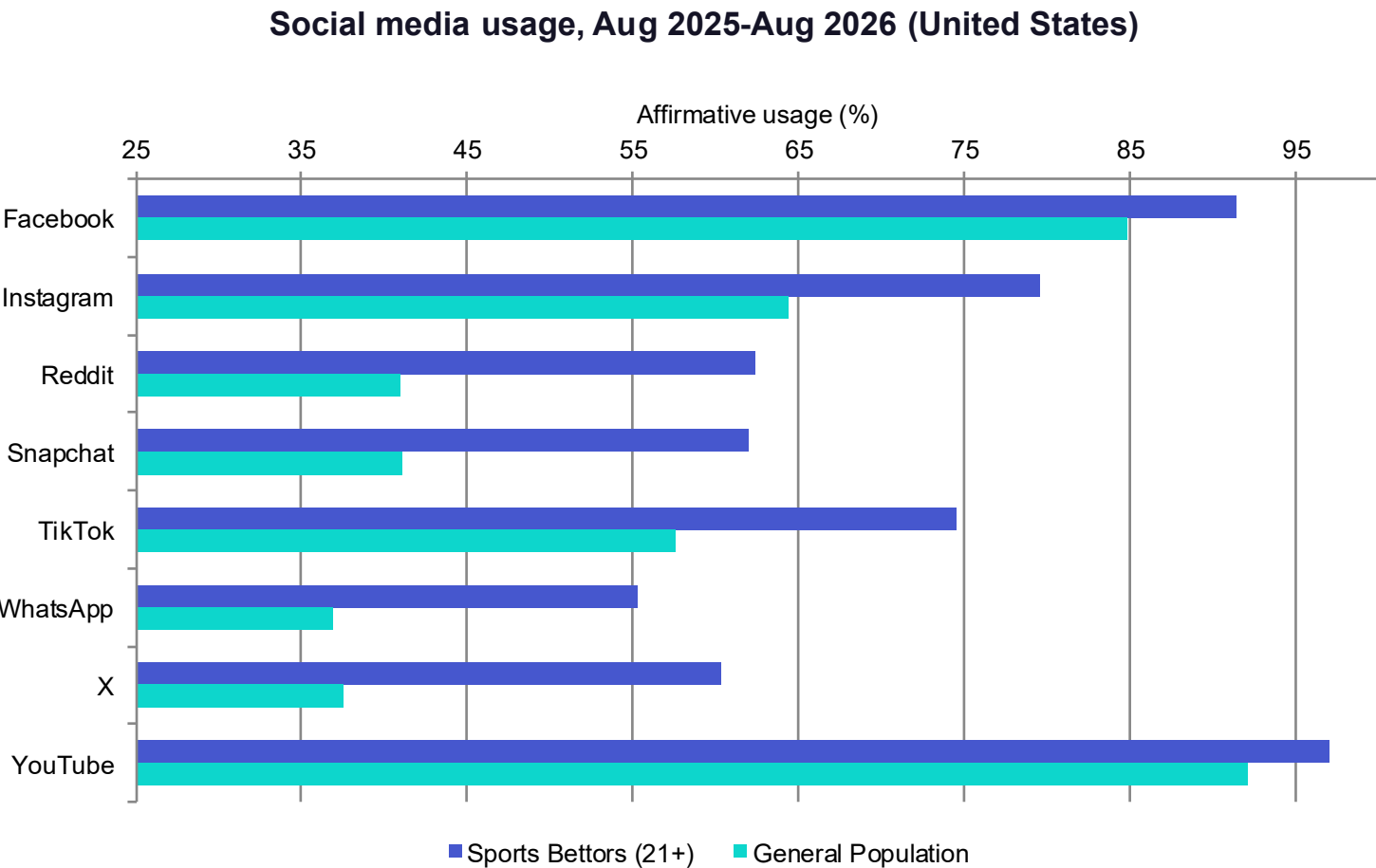
Social, streaming, and live sports provide the clearest paths to reach Sports Bettors

Sports Bettors are highly reachable across social, streaming, live sports, and news, with the strongest growth in emerging social and streaming audio.

- Social media provides both scale and concentrated reach for Sports Bettors. YouTube and Facebook reach more than 9 in 10 bettors, while Instagram, TikTok, Reddit, and X are each higher than the general population by 15–23 points. This creates clear options for broad coverage plus more focused targeting.
- Streaming video and audio are central to how this audience spends time. Netflix, Prime Video, and Hulu are all higher among Sports Bettors than adults overall, and podcasts and Spotify show especially large gaps. This supports consistent reach outside live-game windows.
- Live sports viewing remains the most concentrated media context. Eighty-nine percent of Sports Bettors watch sports on TV or another device versus 66% of adults, with especially high viewing of the NFL, NBA, MLB, and college football. This supports event-timed messaging and sponsorship planning.
- News use is also high across outlets, including broadcast and cable. This adds dependable reach in addition to sports and entertainment contexts, and it can be useful for financial services and travel categories.

Instagram, TikTok, Reddit, and X add concentrated reach on top of YouTube and Facebook scale

YouTube and Facebook provide broad reach, while Instagram, TikTok, Reddit, and X add concentrated access to Sports Bettors.



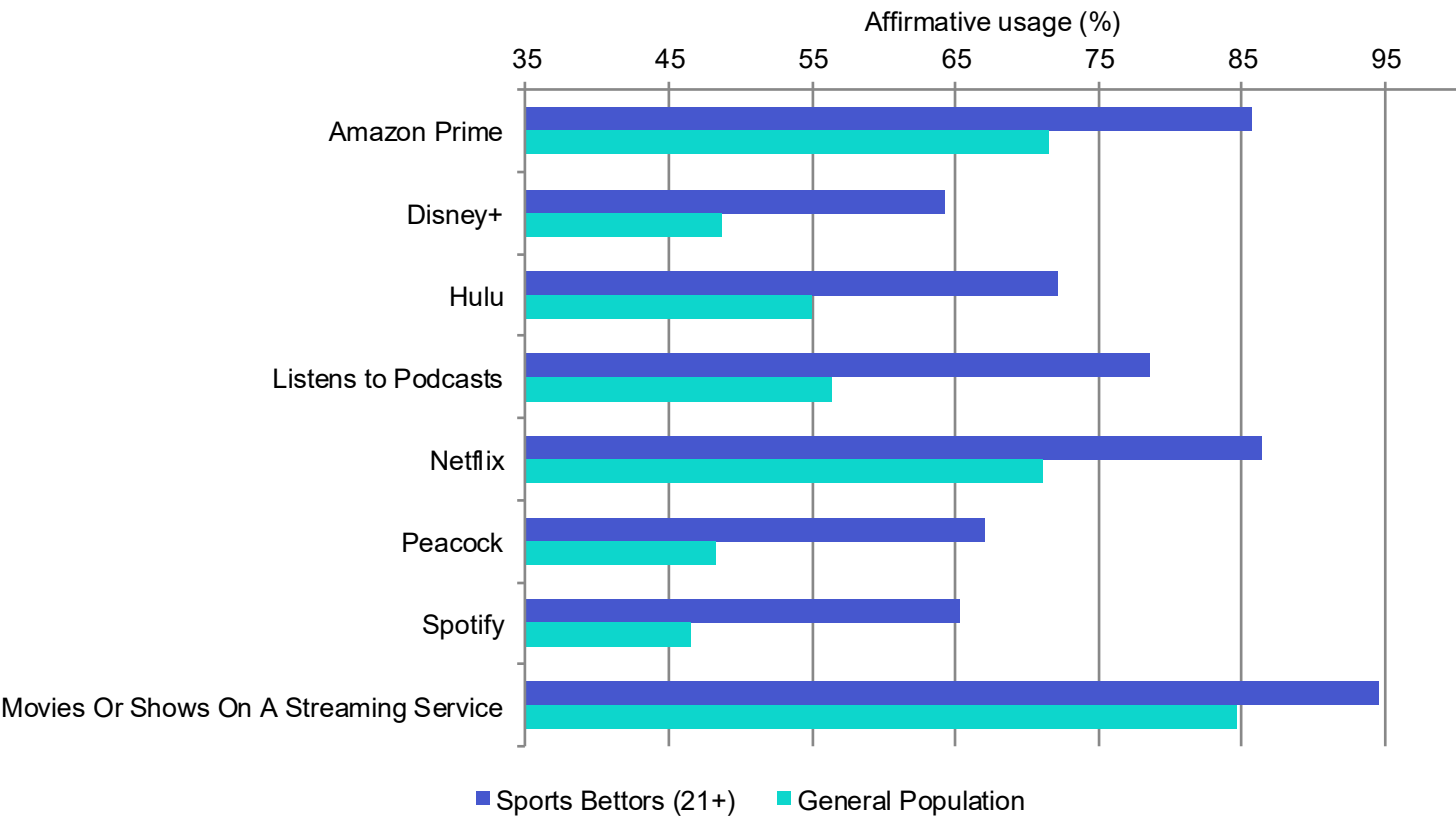
- Sports Bettors use major social platforms at very high rates, with meaningful gaps versus adults overall. Instagram reaches 80% versus 64%, TikTok reaches 74% versus 58%, Reddit reaches 62% versus 41%, and X reaches 60% versus 38%. These differences support social as both a broad reach channel and a concentrated sports-adjacent community channel.
- YouTube (97%) and Facebook (91%) offer near-universal reach for Sports Bettors. Pairing these with higher-difference platforms can help balance reach and relevance without relying on a single platform.

Streaming video and podcasts deliver both reach and repeat contact with Sports Bettors

Streaming video and podcasts combine high reach with meaningful differences versus the general population.

- Streaming video and audio reach is high among Sports Bettors and consistently higher than among adults overall. Netflix and Prime Video each reach 86%, while Hulu reaches 72% and Peacock reaches 67%. Podcasts reach 79% and Spotify reaches 65%, which supports longer-form storytelling and repeated exposure.
- Because streaming is used frequently, it can provide steady continuity. Leaders can use streaming to stay present between live sports peaks and to reinforce offers during sports seasons.

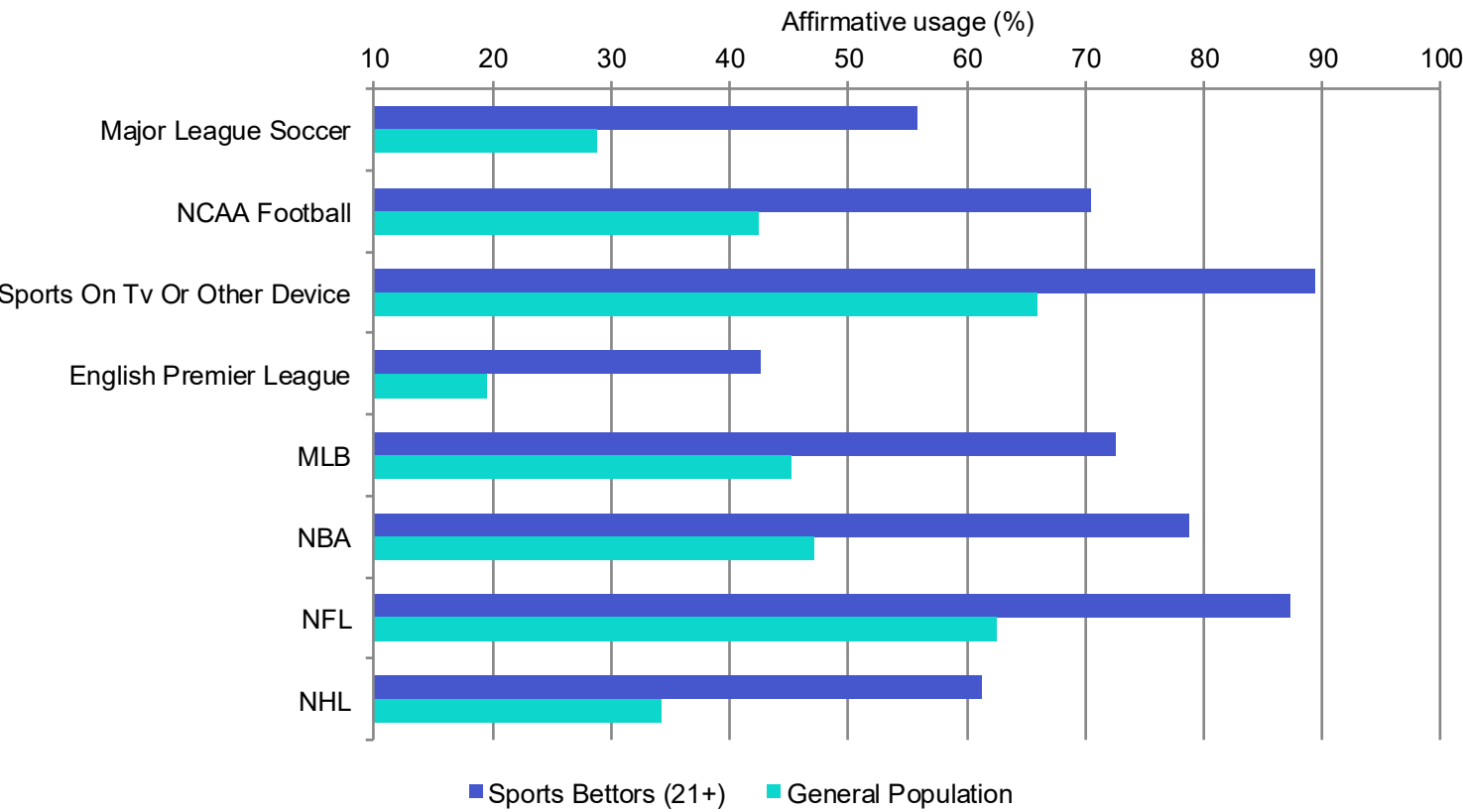
Streaming platforms and podcasts usage, Aug 2025-Aug 2026 (United States)



Live sports remains the highest-yield context for reaching Sports Bettors at scale

Live sports viewing remains the strongest single context for concentrated reach among Sports Bettors.

Sports viewing, Aug 2025-Aug 2026 (United States)

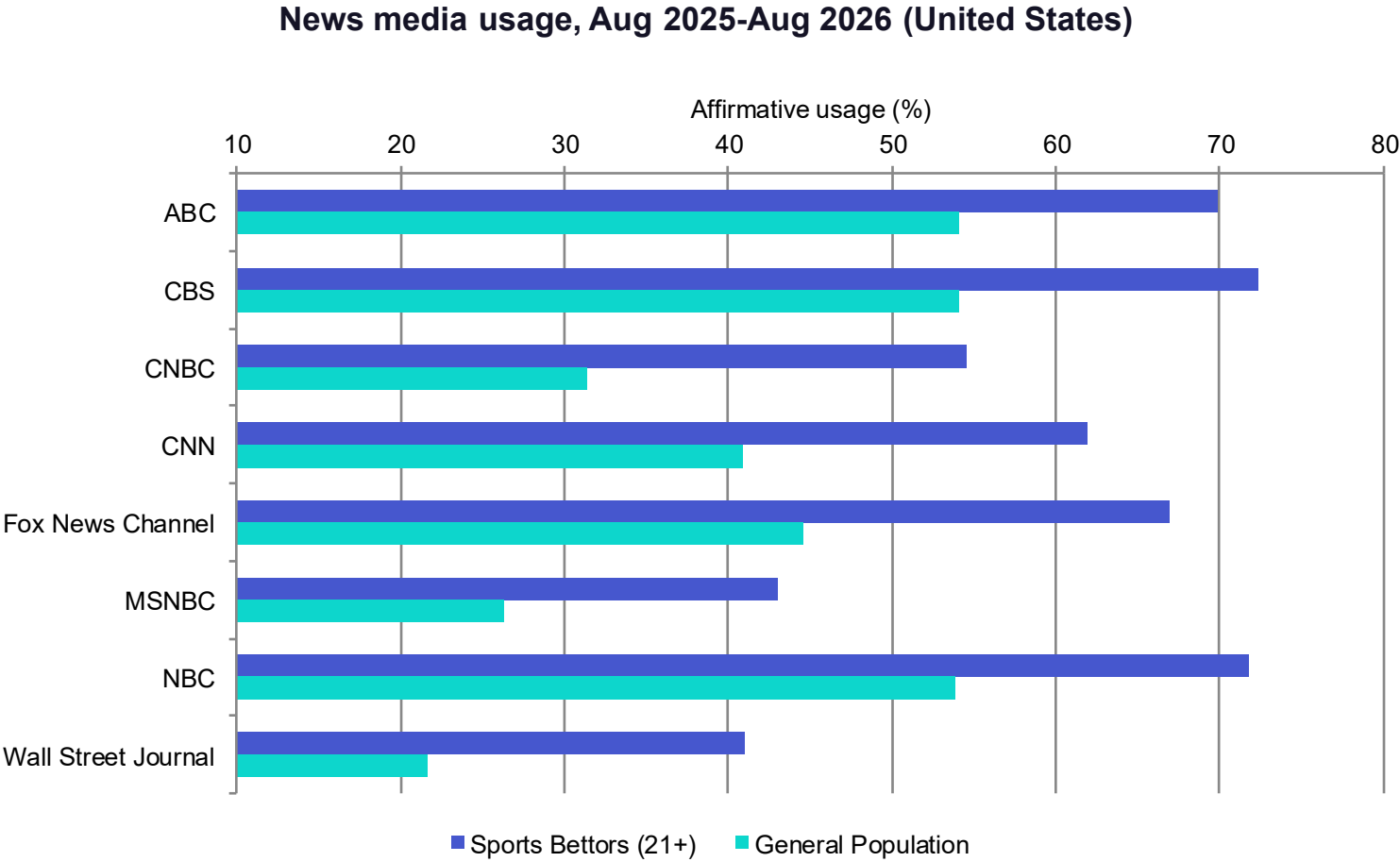


- Live sports is a defining media habit for Sports Bettors. Eighty-nine percent watch sports on TV or another device versus 66% of adults, and league viewing is high across NFL (87%), NBA (79%), MLB (73%), and college football (70%). This concentrates reach into predictable windows.
- These windows also support timely messaging. Offers tied to big games, rivalries, and playoffs can align with high attention and higher likelihood of in-the-moment decisions.

Cross-outlet news use adds a dependable reach layer for Sports Bettors

Sports Bettors consume more news across outlets, creating reliable reach beyond sports programming.

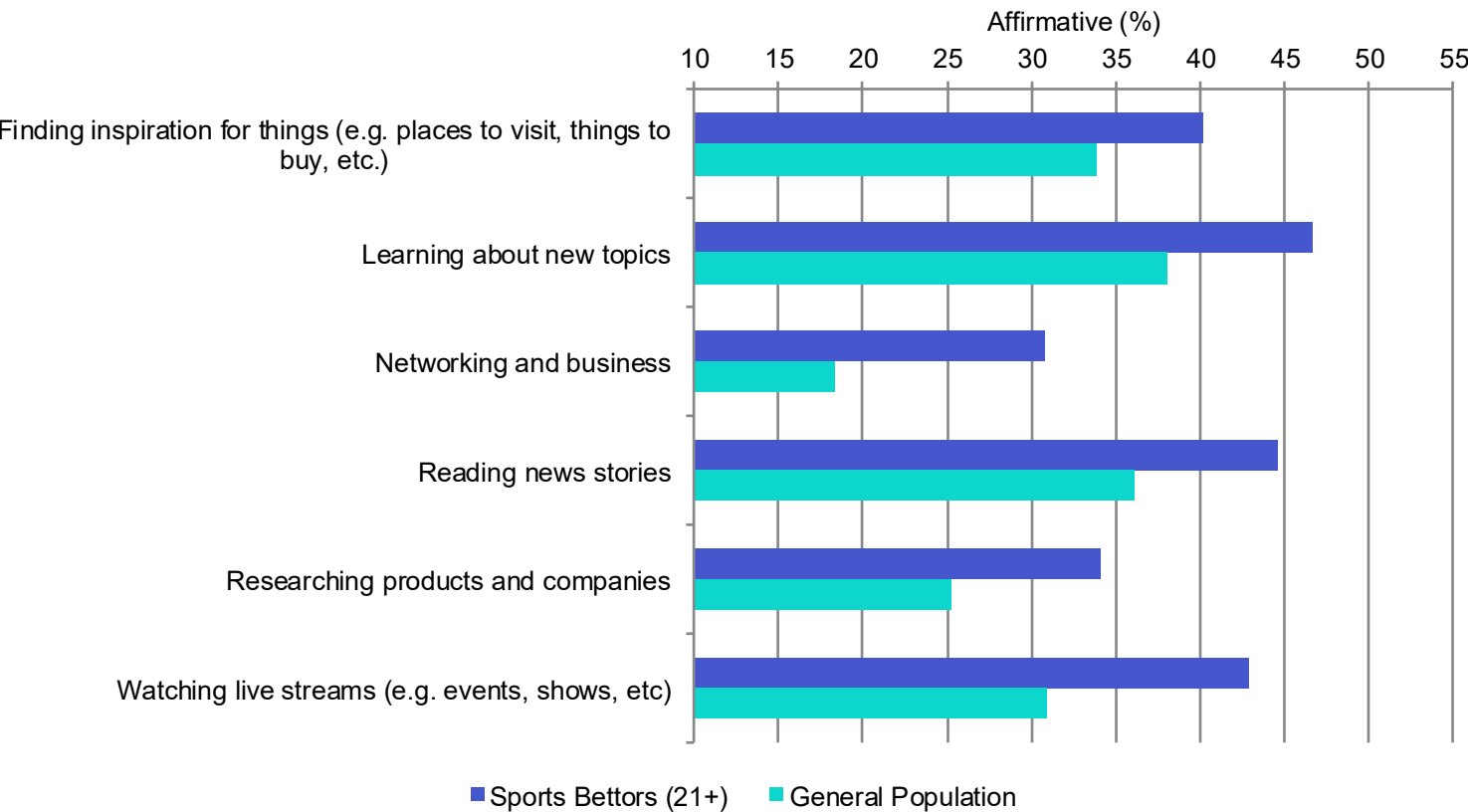
- News consumption is broad among Sports Bettors across broadcast and cable outlets. Fox News reaches 67% versus 45% of adults, and CNN reaches 62% versus 41%, with similar gaps for several broadcast networks. This provides an additional, steady set of touchpoints beyond sports and entertainment.
- Because usage spans multiple outlets, leaders can treat news as a flexible complement. It can support reach goals while helping brands appear in more informational and business-oriented contexts.



Live and informational social use supports discovery, research, and timely offers

Sports Bettors use social for live and informational purposes more often than adults overall, which aligns with discovery and research behaviors.

Reasons for using social media, Aug 2025-Aug 2026 (United States)



- Sports Bettors are more likely than adults overall to use social media to watch live streams, read news, and learn about topics. They are also more likely to research products and companies on social, which signals higher intent while browsing. This supports content that combines entertainment with useful information.
- These motivations also create opportunities for commerce integrations. Product explainers, comparisons, and limited-time offers can fit the “research while scrolling” pattern.

Reddit, TikTok, and streaming audio show the strongest engagement growth among Sports Bettors

Emerging social and streaming channels posted the strongest engagement gains among Sports Bettors over five years.

- Over five years, growth is strongest for newer and community-driven social channels among Sports Bettors. Reddit and TikTok rose the most within the group, while Instagram and X also increased. This points to more opportunities in creator and community formats than in static social placements.
- Streaming audio and video also grew meaningfully, including Spotify, podcasts, Hulu, and Prime Video. Leaders can treat streaming as a reliable way to maintain contact outside game-day peaks.

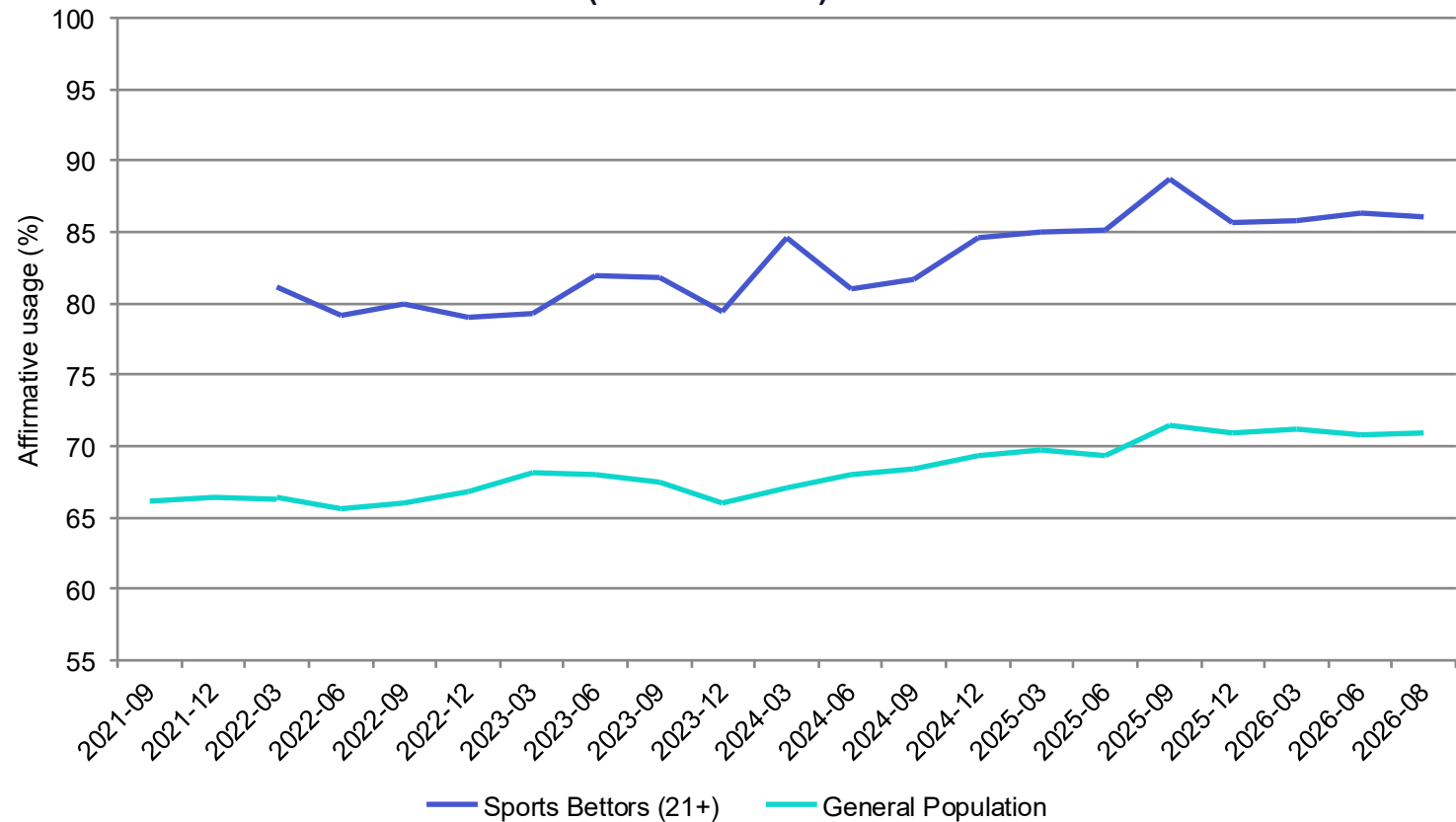
Trend: top channels among Sports Bettors (21+) vs General Population, Q3 2021 to Aug 2026 (United States) - TikTok



Netflix sustains steady reach as newer social and audio channels grow

Netflix continues to provide steady reach for Sports Bettors, complementing faster-growing social and audio channels.

Trend: top channels among Sports Bettors (21+) vs General Population, Q3 2021 to Aug 2026 (United States) - Netflix



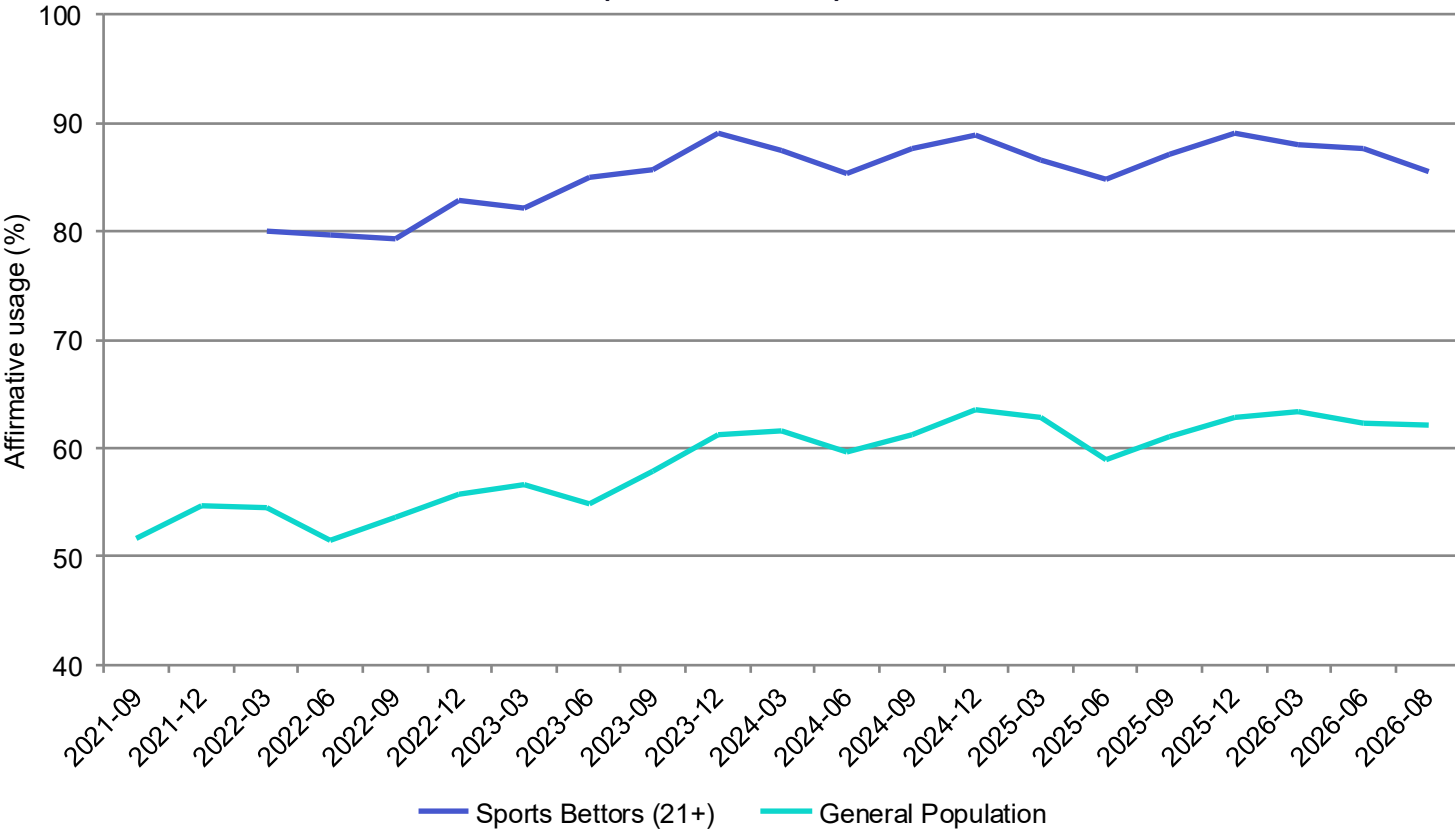
- Scale streamers like Netflix grew steadily from an already high base among Sports Bettors. This keeps streaming a practical place to build reach and reinforce messaging across the year. It also helps maintain presence when sports calendars are quieter.
- Leaders can view this as a balance point. Scale streamers can provide consistent coverage while higher-difference social channels provide more concentrated access.

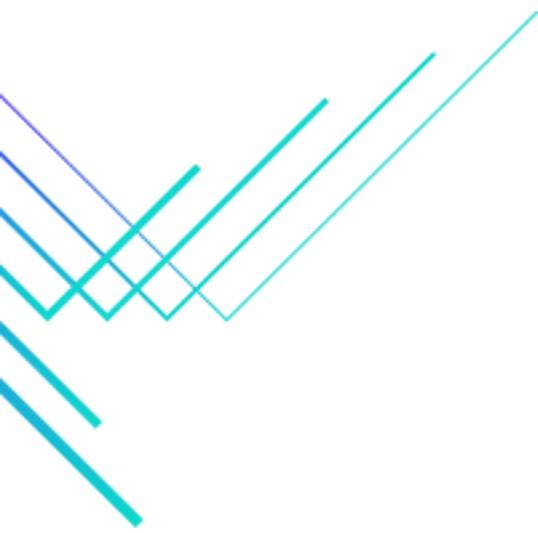
League windows still concentrate Sports Bettors, and NBA gains stand out over time

League viewing remains a durable way to concentrate Sports Bettors in time and context, with especially strong gains for the NBA.

- Live sports viewing among Sports Bettors remains extremely high, and league windows still concentrate this audience. NFL viewing increased modestly, and NBA viewing rose more sharply among Sports Bettors. This keeps league calendars central to timing decisions.
- Because broader sports viewing also rose among adults, some gaps narrow even when bettors stay high. Leaders can focus on high-attention tentpoles to preserve concentration and improve efficiency.

Trend: top channels among Sports Bettors (21+) vs General Population, Q3 2021 to Aug 2026 (United States) - NFL





What They Believe

Early-adopter and convenience-first attitudes stand out, and AI receptivity is rising quickly

Sports Bettors are more tech-forward and convenience-oriented than the general population, with fast-rising AI receptivity and a modestly more right-leaning outlook.

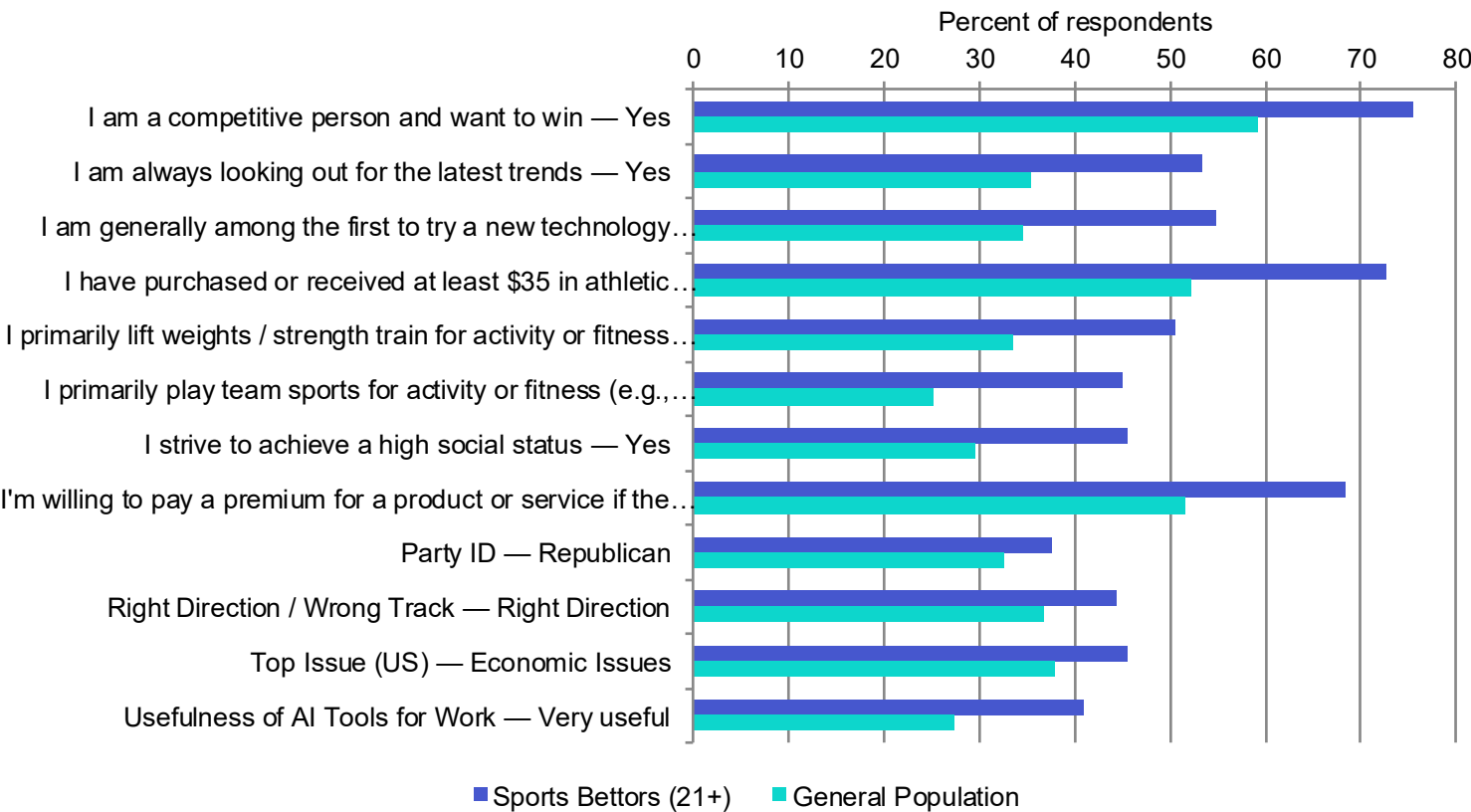
- Sports Bettors are more likely than U.S. adults overall to see themselves as early adopters and to pay for convenience. Fifty-five percent say they are among the first to try new technology versus 35% of adults, and 68% say they will pay more if buying is easier versus 52%. These attitudes support product and messaging that emphasize speed, simplicity, and control.
- They also show stronger sports and performance identity. Sports Bettors are more likely to report team sports participation and other active-lifestyle signals, which aligns with performance-forward framing in sports and fitness contexts. This creates a natural bridge between brand messages and everyday identity.
- Perceived usefulness of artificial intelligence (AI) for work is rising quickly among Sports Bettors. Forty-one percent say AI tools are very useful for work versus 27% of adults, and the gap widened rapidly since mid-2025. This supports feature-led messaging that highlights time savings and better outcomes.
- On politics, Sports Bettors lean modestly more Republican and are more likely to say the country is on the right track. This does not define every bettor, but it raises the value of neutral, performance-focused tone in broad-reach messaging.

WHAT THEY BELIEVE

Tech-forward and convenience-first attitudes align with a stronger performance identity

Sports Bettors combine technology openness and convenience preferences with a stronger sports and performance identity than U.S. adults overall.

US 12-month defining attitudes: Sports Bettors (21+) vs General Population (Aug 2025-Aug 2026)

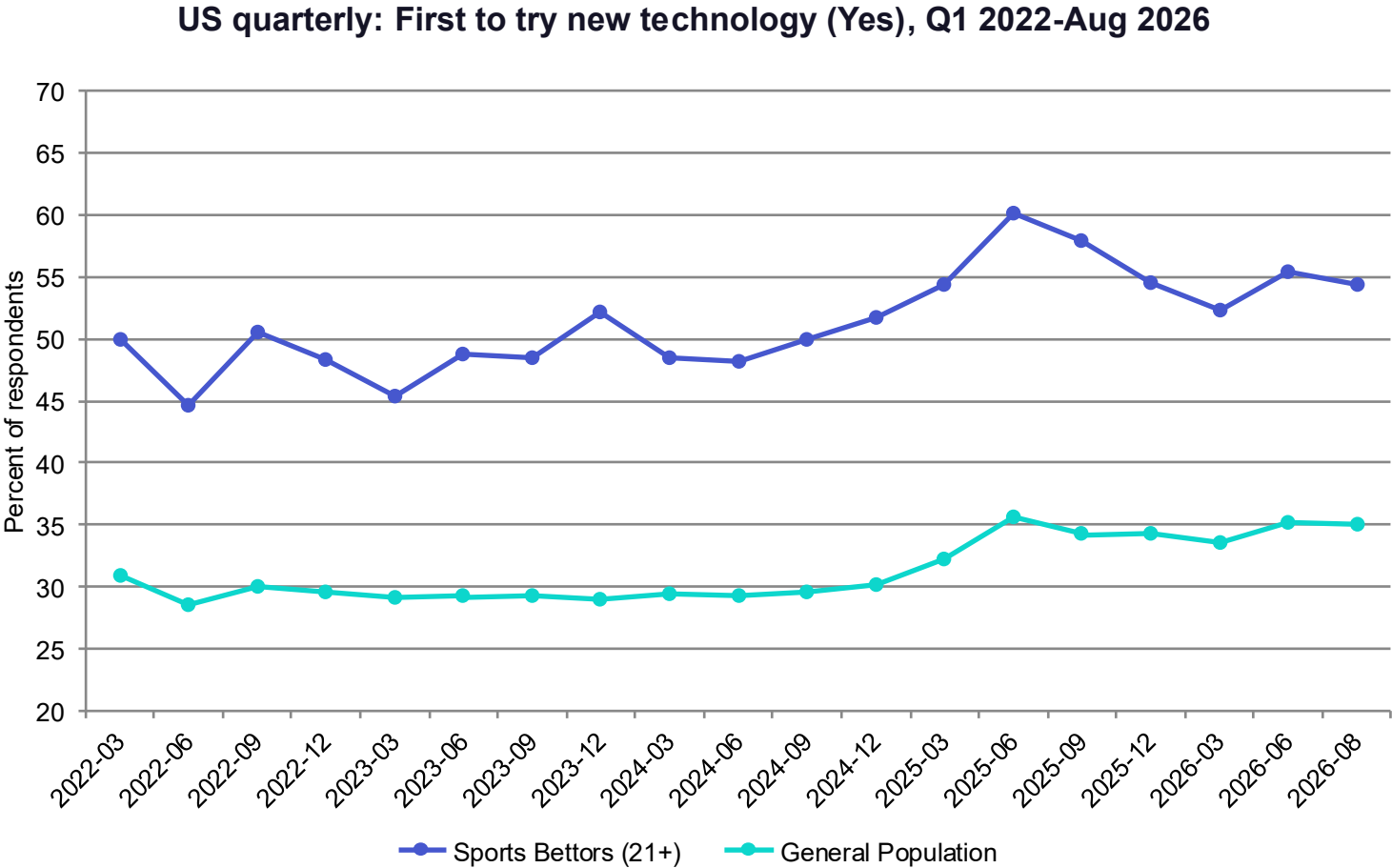


- Technology openness and convenience are among the clearest attitude differences. Sports Bettors are 20 points higher than adults on being first to try new technology (55% versus 35%) and 17 points higher on paying more for easier buying (68% versus 52%). These gaps support simpler experiences and feature-forward messaging.
- Sports and performance signals also differentiate the group. Higher agreement with sports- and winning-oriented statements supports creative that connects products to performance, preparation, and shared sports culture.

Early-adopter identity remains consistently stronger among Sports Bettors

Sports Bettors’ early-adopter identity has remained consistently stronger than the general population since 2022.

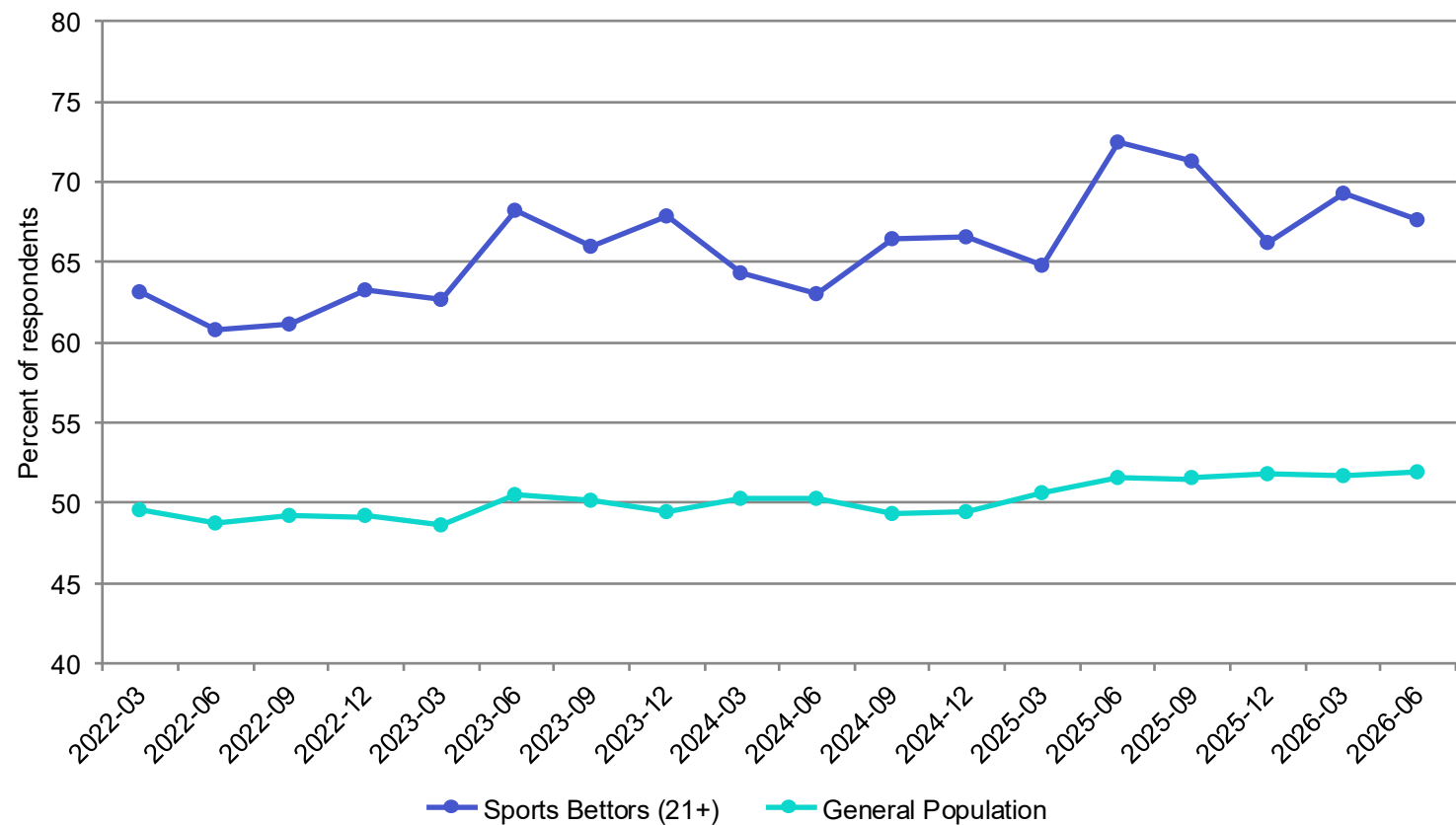
- The early-adopter gap is durable across multiple years. Sports Bettors consistently run about 15–20 points above the general population on being first to try new technology. This supports using Sports Bettors as a good audience for piloting new digital features.
- Durability also reduces planning risk. Leaders can treat this as a stable audience characteristic rather than a temporary spike tied to a single moment.



Willingness to pay for convenience remains higher and is strengthening among Sports Bettors

Sports Bettors’ willingness to pay for an easier buying experience remains higher and has strengthened over time.

US quarterly: Will pay premium if buying is easier (Yes), Q1 2022-Jun 2026



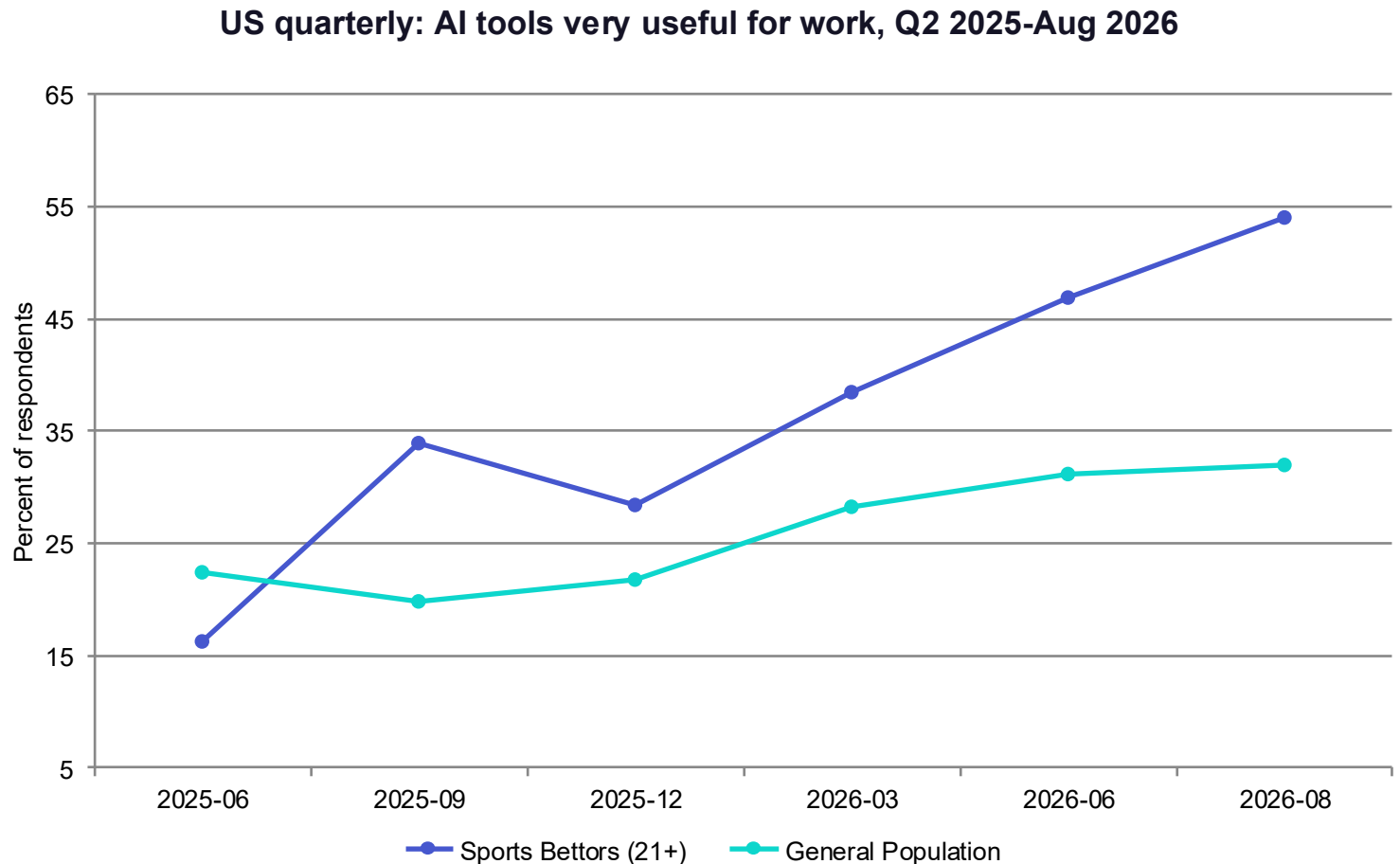
- Sports Bettors are consistently more willing than adults overall to pay extra for an easier buying experience. The series rises within the bettor audience while remaining lower in the general population. This supports pricing and packaging that trades convenience for value.
- Convenience is also a communication opportunity. Simple explanations of how a product saves time or reduces steps can align with what this group says it values.

WHAT THEY BELIEVE

Perceived usefulness of AI for work is rising faster among Sports Bettors

Sports Bettors' perceived usefulness of AI for work rose sharply, widening the gap versus the general population.

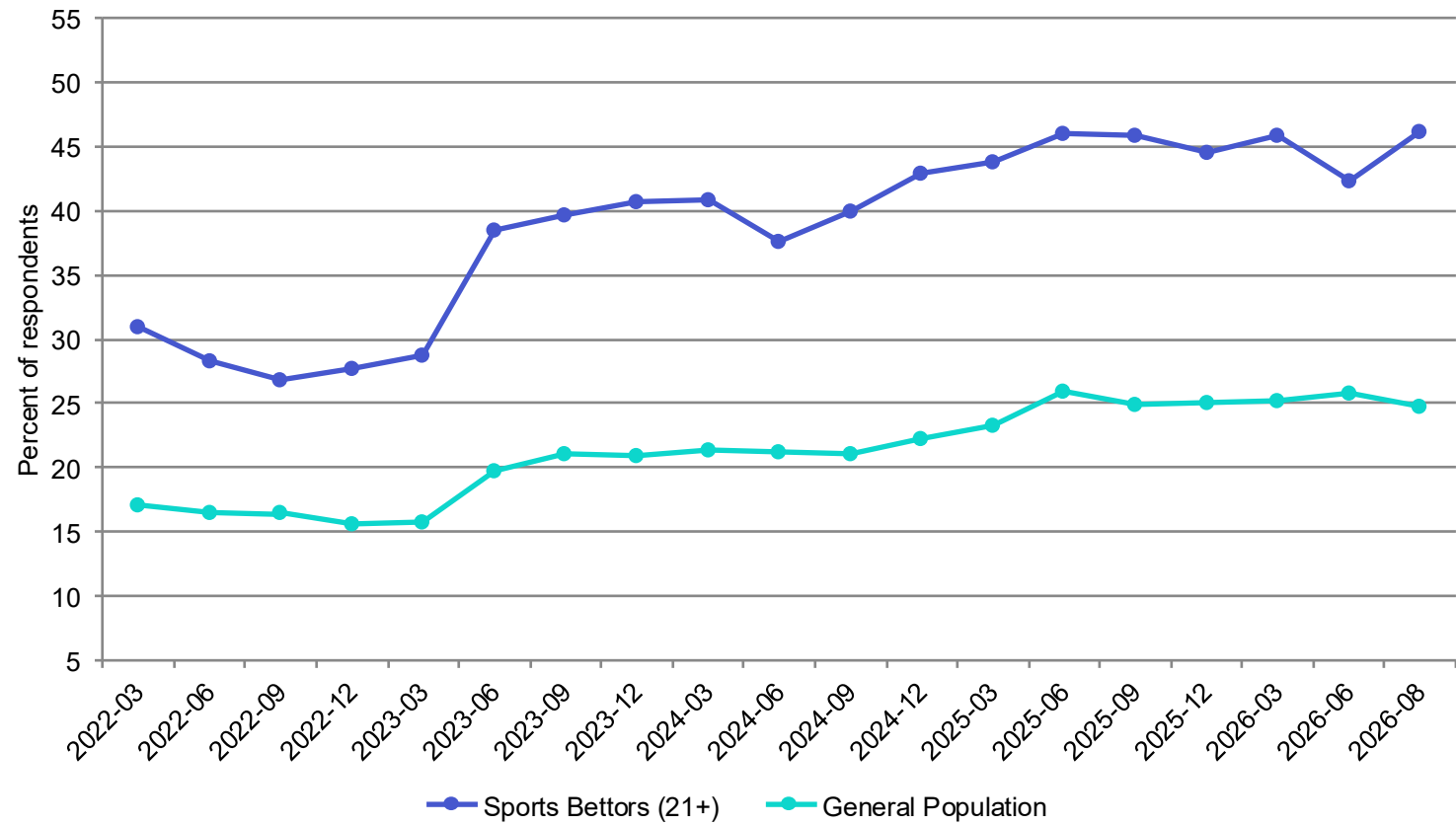
- Sports Bettors' belief that AI tools are very useful for work increased rapidly since mid-2025. In the current period, 41% say AI is very useful versus 27% of adults. This points to higher openness to AI-enabled features and workflows.
- The implication is practical, not abstract. Messages that focus on clear outcomes, such as time saved or fewer errors, may land better than messages that focus on "AI" as a concept.



Team-sport identity is strengthening among Sports Bettors relative to adults overall

Team-sport participation is increasingly distinct among Sports Bettors, strengthening their active identity.

US quarterly: Primarily play team sports (Yes), Q1 2022-Aug 2026



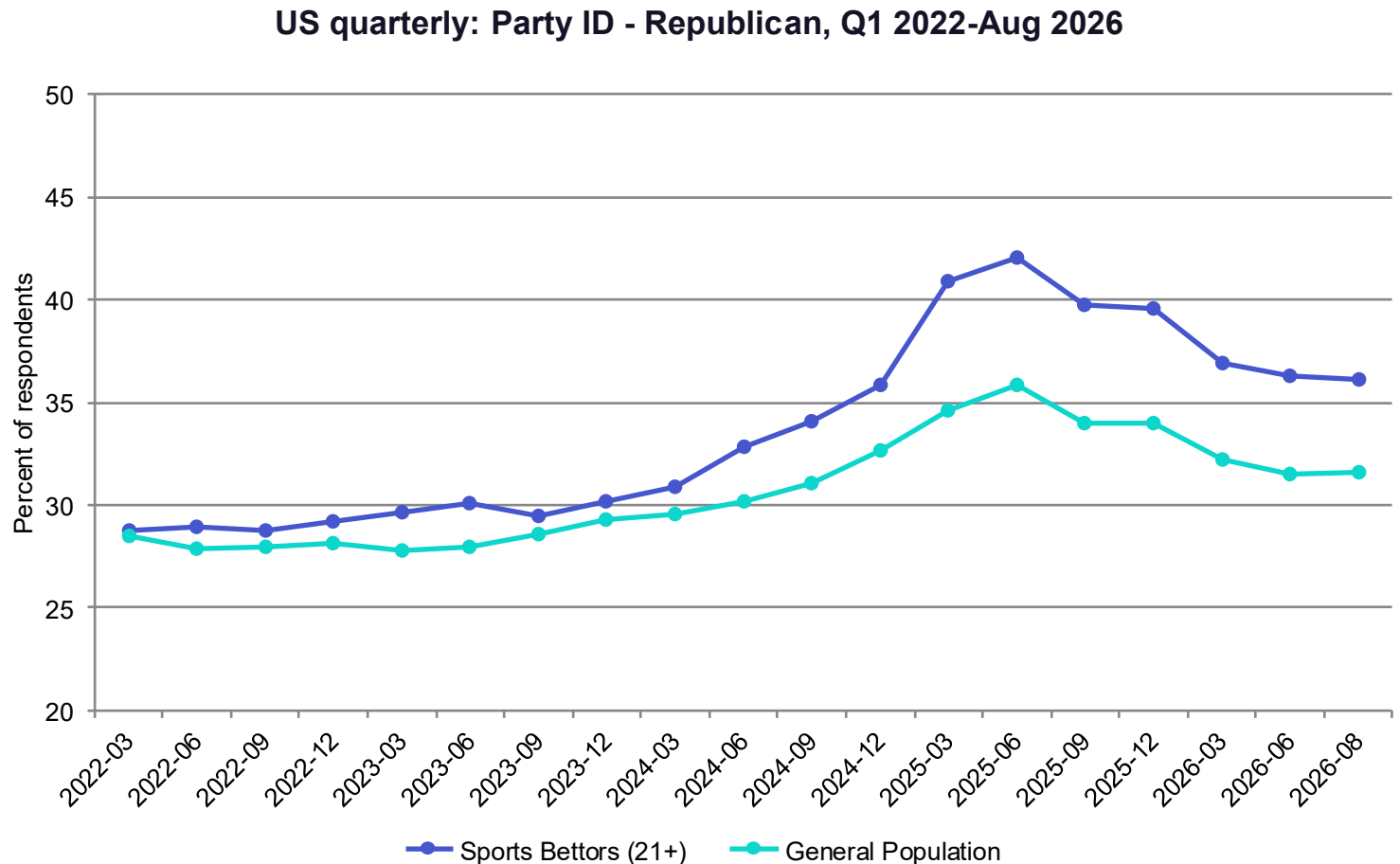
- Team-sport participation grew faster among Sports Bettors than among adults overall. This widened the gap over time and reinforces that sports are not only something they watch, but also something many do. That difference can matter for performance, wellness, and community positioning.
- Sports identity also creates more natural partnership space. Brands can connect to leagues and also to local play, which can extend relevance beyond major events.

WHAT THEY BELIEVE

Republican identification is modestly higher among Sports Bettors and has edged up over time

Sports Bettors have become modestly more Republican than the general population over time.

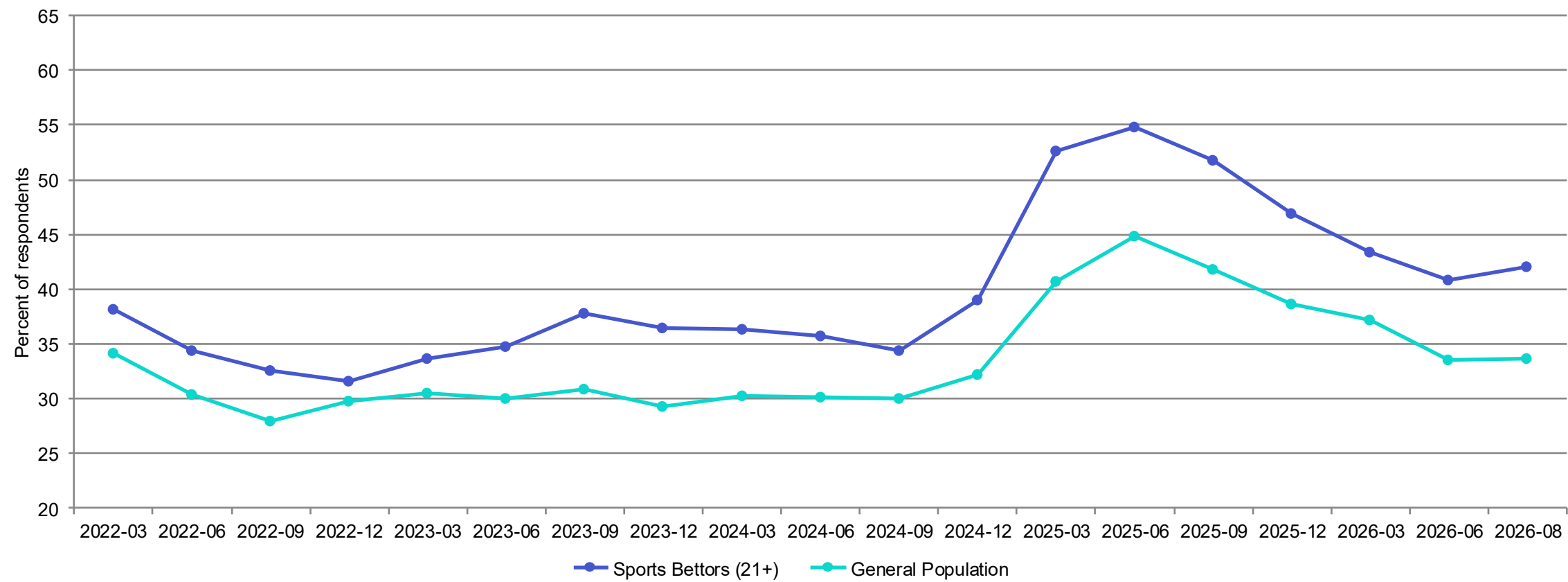
- Sports Bettors lean modestly more Republican than the general population, and the gap widened gradually since 2022. This is a tendency at the group level, not a defining feature of every bettor. It matters most for tone and context choices in broad messaging.
- When brands need mass reach, performance-based framing can help. Clear value, simplicity, and product outcomes can reduce the chance that messages are interpreted through a political lens.

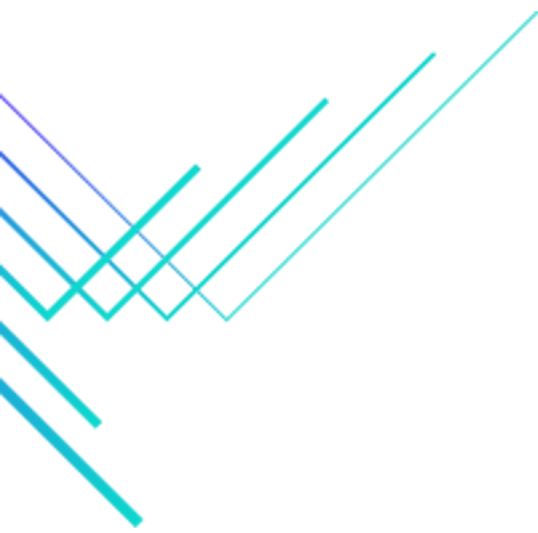


Right-direction sentiment is modestly higher among Sports Bettors than among adults overall

Sports Bettors are more likely than adults overall to say the country is headed in the right direction, and that difference has become modestly more distinct since 2022.

US quarterly: Right Direction, Q1 2022-Aug 2026





Implications & Opportunities

Five evidence-backed opportunities follow from how Sports Bettors spend, watch, and decide

Sports Bettors combine higher reachability in sports and streaming with stronger demand signals and a convenience-first mindset, creating clear options to drive near-term outcomes and long-term growth.

- **Use live sports to concentrate reach, then sustain presence with streaming and social.** Live sports viewing reaches 89% of Sports Bettors versus 66% of adults, and major leagues all show large gaps. Podcasts (79% versus 56%) and streaming platforms can maintain steady contact outside marquee game windows.
- **Make “easy and fast” part of the value story, while respecting cooler 2026 momentum.** Sports Bettors are more willing to pay for easier buying (68% versus 52%), and they show stronger confidence and demand signals than the headline. CHI and finances still softened year over year, so offers that clearly explain what consumers get for the price can help close the gap between interest and action.
- **Design for app-native behavior, because payments and commerce already run through phones.** Person-to-person transfers (87% versus 70%), social buying (73% versus 51%), and meal delivery (68% versus 44%) are all more common among Sports Bettors. This supports friction-reducing checkout, quick re-order, and rewards that are easy to earn and redeem.
- **Link experiences to mobility, travel, and nights out.** Sports Bettors report more bar/restaurant occasions (79% versus 53%), higher ride share intensity, and more hotel stays than adults overall. Partnerships and timing tied to weekends, travel planning, and event nights can align with when spending is naturally higher.
- **Plan for long-run growth as the audience gets younger and access expands.** Gen Z’s share within Sports Bettors has risen by 12 points since 2022, which expands the pipeline of younger adults entering higher-earning years. Legal access also remains broad across states, which supports continued category participation where regulated ([Legal Sports Report state-by-state tracker](#)), and the broader commercial gaming market continues to report record revenue levels ([American Gaming Association 2025 commercial gaming revenue release](#)).

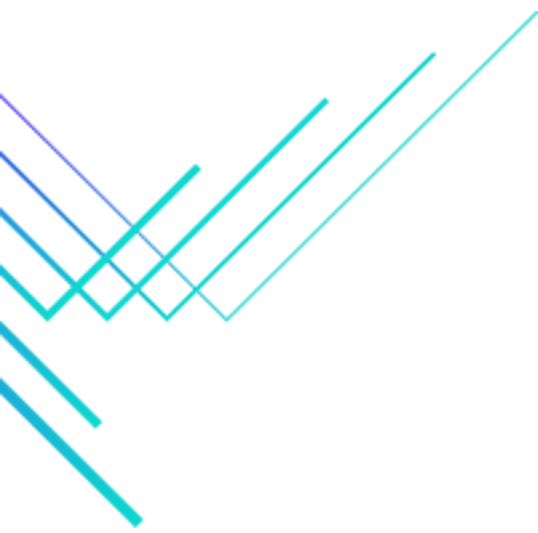
Want to **Learn More?**

Have questions about this report or want to dig deeper?
Reach out to your [Morning Consult Client Strategist](#).

Contact us at:
customersuccess@morningconsult.com

We're here to help.





Appendix

About This Report

This report was generated using AI-assisted systems that compile and analyze proprietary data. While these systems are designed for accuracy and reliability, automated outputs may contain errors or incomplete information.

All data, analyses, and interpretations should be reviewed and validated before being used for strategic or external purposes .

Beta Disclaimer: This report was generated with a beta version of Morning Consult's AI Agents. This means it's still being tested, and you might notice occasional limitations or inconsistencies.

Report Parameters

Source: Morning Consult public opinion data drawn from the Morning Consult Intelligence (MCI) Daily Brand Tracker

Country: United States

Audience: Sports Bettors (21+)

Date Prepared: August 19, 2026

Timeframes:

- **Aggregations:**
 - **Audience profiles:** August 1, 2025 - August 19, 2026
- **Time series:**
 - **Audience trends:** July 1, 2021 - August 19, 2026
 - **Economic indicators:** September 1, 2020 - August 19, 2026

Consumer Health Index Definition

The Consumer Health Index (CHI) is Morning Consult's proprietary measure of **near-term consumer demand**.

Unlike traditional economic indicators with long reporting lags, the CHI provides a near real-time, forward-looking signal of consumers' capacity and willingness to spend, helping business leaders anticipate shifts in demand.

The index combines:

- A predictive measure of ability to afford purchases, based on lagged changes in unemployment, and
- A real-time measure of willingness to spend, based on consumers' assessments of their current personal financial conditions.

Together, these components estimate consumers' overall demand in the economy.

Higher CHI values indicate stronger consumer demand, while declining values suggest potential softening in spending.

Index of Consumer Sentiment Definition

The Index of Consumer Sentiment (ICS) is Morning Consult's proprietary, **real-time measure of consumer confidence**.

The index captures how consumers feel about their personal financial situation and business conditions in the country, making it a timely indicator of the economic impact of major events.

The ICS is calculated as the average of five components:

- Expectations for national business conditions over the next 12 months
- Expectations for national business conditions over the next 5 years
- Perceptions of current buying conditions for major household purchases
- Expectations for personal finances over the next 12 months
- Assessments of current personal financial conditions

Rising ICS values typically signal improving consumer confidence, while declining values suggest growing caution.

Definitions & Calculations

Personal Finances: Current Conditions

Question: Would you say that you (and your family living there) are better off or worse off financially than you were a year ago?

Responses: Better off, About the same, Worse off, Don't know/No opinion

Income Buckets

This report groups granular income brackets into three buckets to make the data easier to interpret and act on.

High: \$100k+

Medium: \$50k-\$100k

Low: Under \$50k

Definitions & Calculations (continued)

Population size estimated by applying the segment's share of the population to the total U.S. adult population, with a margin of error that reflects a 95% confidence interval.

$$\text{Population Size} = (R \pm 2SD) \times B$$

R = Segment N ÷ Gen Pop N

SD = standard deviation of R

B = adult population base for the selected country

Data Collection

High-quality data collection is at the foundation of everything we do at Morning Consult. It's how we survey over 35,000 people around the world every day. Learn more about our [methodology](#).

Data Collection Technology

Morning Consult's proprietary technology connects with a diverse global network of trusted survey panel providers that reaches tens of millions of adults globally. Dynamic bidding algorithms reduce costs and field time while eliminating human error and collecting sample as efficiently as possible. Data is processed and delivered in near real-time so customers can access their data when it matters most.

Quota Sampling and Weighting

Morning Consult collects respondents via quota sampling with strata defined by age, gender, educational attainment, and/or language spoken across 600+ different strata every day. After data collection, Morning Consult applies weights using iterative proportional fitting, or "raking." We conduct our weighting using a combination of age, race, sex, educational attainment, and region, though each country's weighting scheme is adapted based on local considerations.

Benchmarking & Validation

Morning Consult has set up automated processes to compare our data with external data sets. We continually benchmark against several measures from large-scale government surveys.

About Morning Consult

Morning Consult is an AI-powered decision intelligence platform and consultative partner that turns our always-on consumer signal into decisive action. By connecting global consumer outlook to business outcomes, we help leaders navigate emerging risks and opportunities with agility.

Learn more at morningconsult.com

