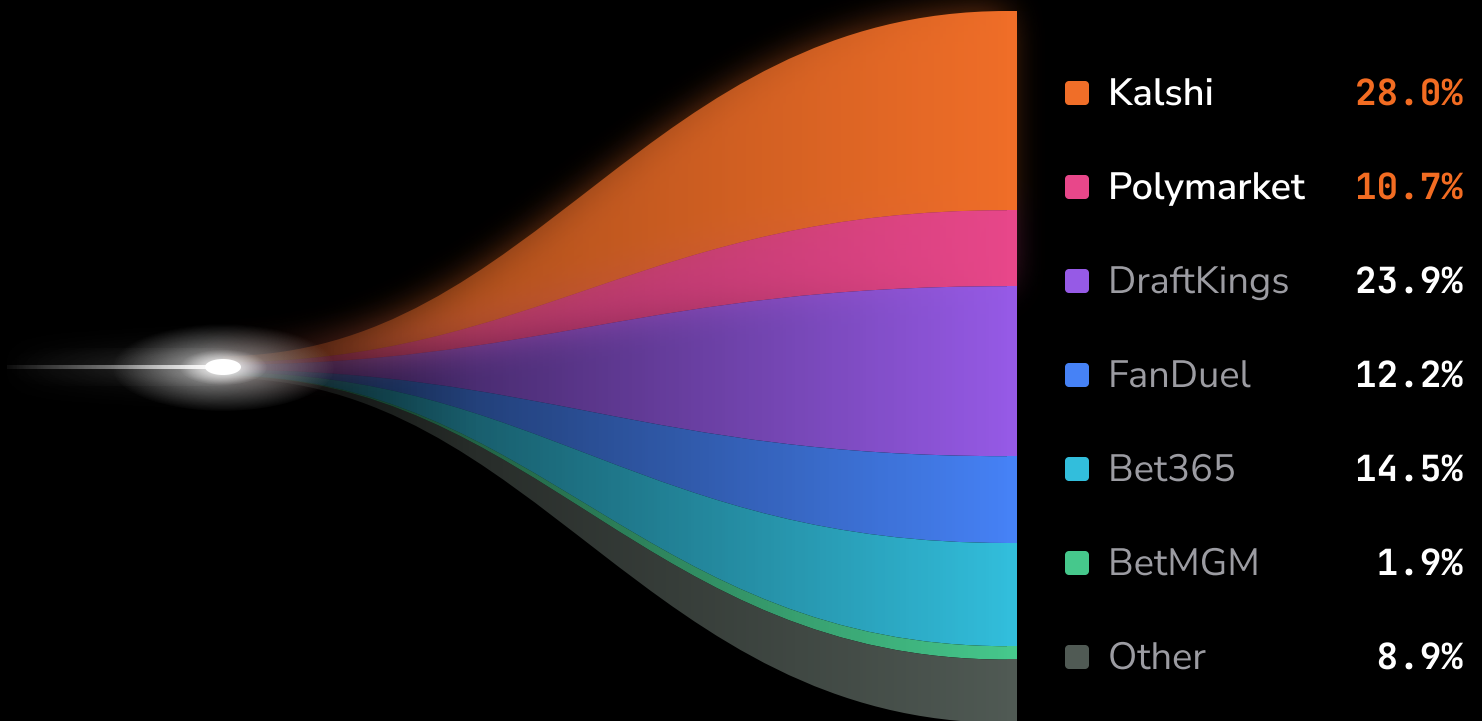


SEPTEMBER GROWTH PRISMS

Prediction markets were 6% of US sportsbook digital ad share a year ago.

They were 39% in August.

September is this category's heaviest month of digital ad spending.
The NFL season opens on the 9th.



Aug 2026

PREDICTION MARKETS, COMBINED SHARE

38.7%

Share of Carbon Arc's Online Sportsbook category, every measured advertiser included.
Panel estimates, not a census.

Source: Carbon Arc Digital Advertising - CA009

carbonarc.ai/prisms

RE-TIMED, NOT RETREATED

The World Cup shifted summer’s digital ad spend.

The World Cup pulled incumbent money into June and July. Across the full summer, very few spent less than last year.

Online Sportsbook [growth index, 2026 vs 2025](#) 100 = FLAT

ADVERTISER	JUN - JUL	AUGUST	FULL SUMMER
Online Sportsbook CATEGORY	453	126	300
DraftKings	676	269	434
FanDuel	242	48	108
BetMGM	148	22	71
Bet365	102	79	101
Other	76	52	62

ORANGE AT OR ABOVE FLAT BLUE BELOW FLAT

OFF THE SCALE

Kalshi2,606

Polymarket15,858

FULL-SUMMER INDEX, OFF A NEAR-ZERO BASE

Read the FanDuel row across:
up 2.4x in June+July, halved in August, still up for the summer.

WHAT SEPTEMBER 2026 IS UP AGAINST

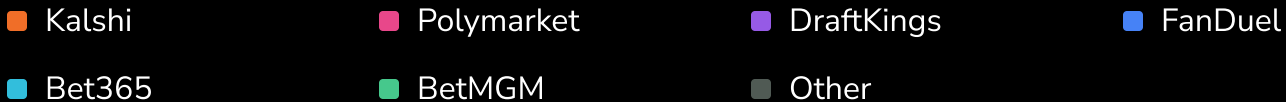
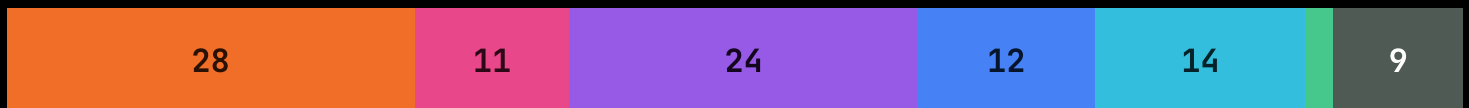
September is the highest ad spending month this category has. This September holds five fewer days of football.

It also laps the biggest September in the series.

SEPTEMBER 2025 - THE BASE



AUGUST 2026 - WHERE THIS SEPTEMBER STARTS



Shaded days are NFL regular season. The 2025 season opened Thursday, September 4th.
The 2026 season opens tonight, September 9th, about 18% less football in the month.

This category's digital ad spending is increasingly driven by prediction markets.

Where will this Prism land when September ends?

Share of Carbon Arc's Online Sportsbook category, every measured advertiser included.
Panel estimates, not a census.

September 2026 advertising is not yet observable; the latest complete week begins 24 August.

Source: Carbon Arc Digital Advertising - CA009

carbonarc.ai/prisms