



EMERGING PLAYERS

PROFILE

Younger, socially driven and experience-first, this audience sees life as something to participate in, not observe.



DEMOGRAPHICS



51%
Men



49%
Women



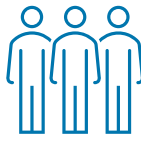
1,876,000
Estimated Population



\$114,825
Median Household Income



75% White
9% Hispanic
8% African American
8% Asian
*Multi-select question



Household Size

44% 3-4 People
23% 2 People
23% 5+ People
10% 1 Person
53% Have Children in HH

32.4
Median Age

26% 18-24
34% 25-34
31% 35-44
9% 45-54
0% 55+



43% Married
50% Never Married
19% Live with Significant Other
*Multi-select question



86% Employed
66% Full Time
20% Part Time



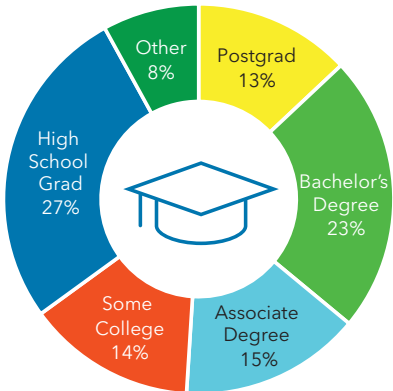
63% Own a Home
34% Rent



46% Have Children



61% Own a Pet



PERSONAL VALUE SYSTEM

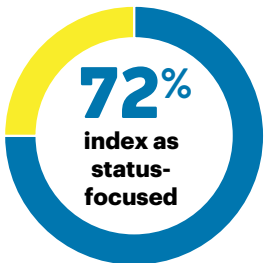


IDENTITY

Status as currency

How they're seen matters as much as what they do

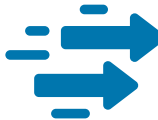
Image isn't vanity for them, it's social capital. They actively shape perception and seek recognition.



SOCIAL ROLE

Influencer mindset

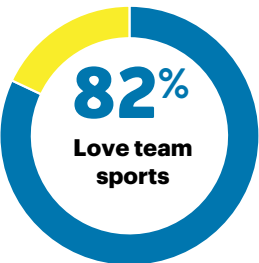
They don't follow culture, they move it and shape it. Their opinions travel. Their behavior influences others in their circles.



LIFESTYLE

Always in motion

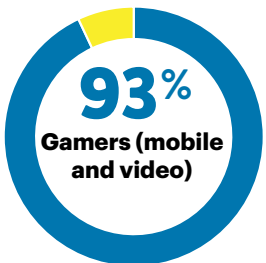
Activity is constant and they are always going somewhere. Their lives flex with seasons, social calendars and opportunities.



ENTERTAINMENT

Playful & social

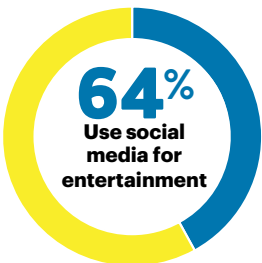
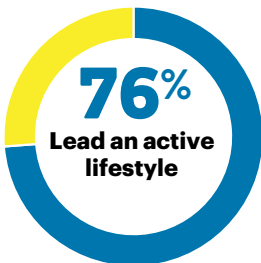
Play is connection, not just entertainment. Games, events, and shared experiences are core to how they engage.



MEDIA

Always connected, rarely focused

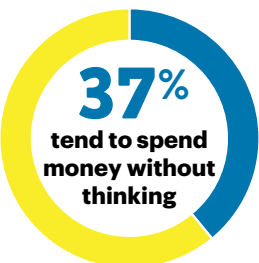
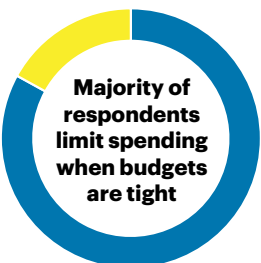
Consumption is fragmented, fast, and driven by entertainment.



MONEY

Flexible spenders driven by experience

They spend on moments, pull back when needed, and prioritize enjoyment.





EXPERIENCED PLAYERS

PROFILE

Older, higher-income, and rooted in consistency – this audience values stability first.



DEMOGRAPHICS



55%
Men



45%
Women



627,000
Estimated Population



\$126,641
Median Household Income



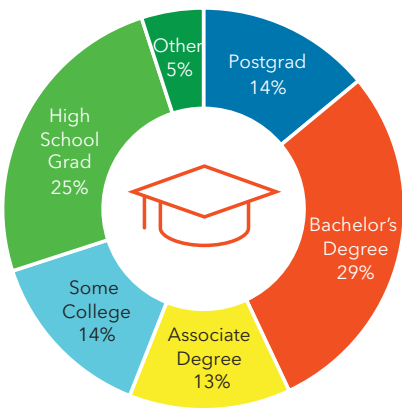
87% White
6% African American
4% Asian
3% Hispanic
*Multi-select question



43% 2 People
32% 3-4 People
15% 1 Person
39% Have Children in HH
23% under 18
21% Adults

57.8
Median Age

0% 18-24
0% 25-34
22% 35-44
24% 45-54
54% 55+



74% Married
11% Never Married
11% Live with Significant Other
*Multi-select question



60% Employed
51% Full Time
9% Part Time
29% Retired



91% Own a Home
9% Rent



76% Have Children



54% Own a Pet

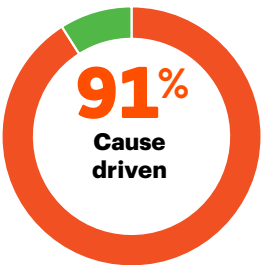
PERSONAL VALUE SYSTEM



IDENTITY

Responsibility first

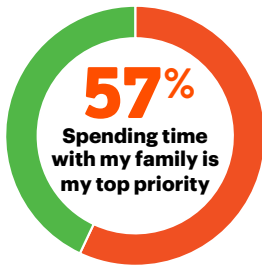
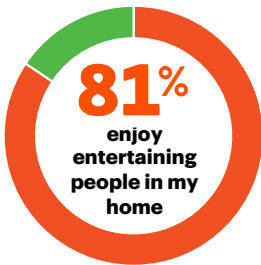
Defined by reliability and control. They take pride in being dependable, informed, and grounded.



SOCIAL ROLE

Connection happens through tradition

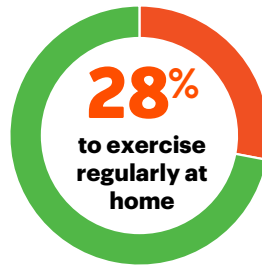
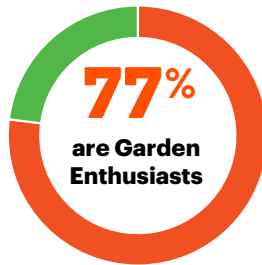
Relationships are built through shared rituals, not constant novelty and connection is very planned.



LIFESTYLE

Purposeful activity

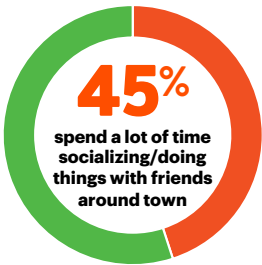
Staying active, but with intention. Their activity is consistent, practical, and often tied to home or hobbies.



ENTERTAINMENT

Entertainment with intention

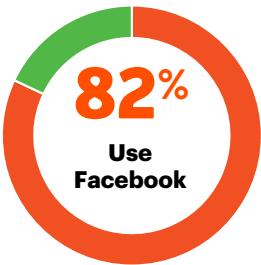
Every outing has a purpose. From neighborhood events to nights spent with close friends, they value experiences that create meaningful memories over fleeting moments.



MEDIA

Consistent, trusted, and routine-based

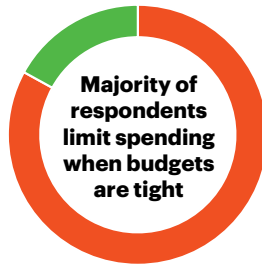
They rely on familiar platforms and structured consumption habits.



MONEY

Measured, cautious, and practical

Spending decisions are intentional and grounded in value.



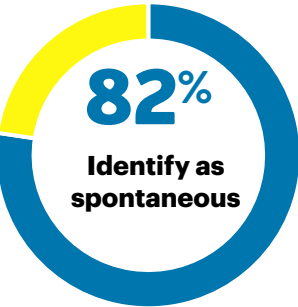


EMERGING:

LOTTERY MINDSET

A spontaneous extension of the moment

Lottery fits naturally into their impulsive, social, and emotional behavior.

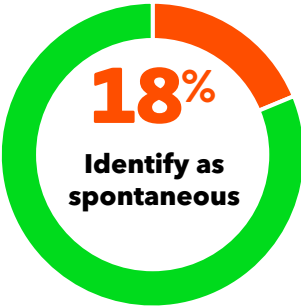


EXPERIENCED:

LOTTERY MINDSET

A controlled risk within routine

Lottery is not impulsive, it's a small, acceptable deviation.

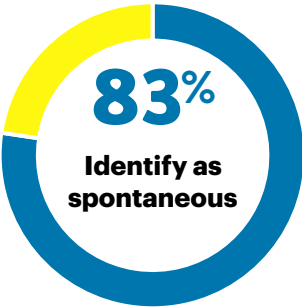


EMERGING:

CORE DRIVER

Experience over everything

Life is measured in moments, not routines. They prioritize novelty, spontaneity, and stimulation over consistency.

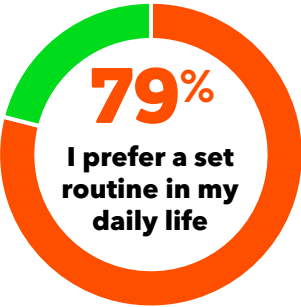


EXPERIENCED:

CORE DRIVER

Structure

Routine creates comfort and confidence. Daily habits anchor their lives, reducing uncertainty.



HOW THEY MAKE DECISIONS:

Impulse vs. Intention

EMERGING PLAYERS



- **Driven by** emotion, energy, and what's happening now
- **Decisions are** fast, social, and reactive
- **Triggered by** mood, friends, environment

EXPERIENCED PLAYERS



- **Driven by** logic, routine, and familiarity
- **Decisions are** measured, repeatable, and controlled
- **Triggered by** habit, value, known patterns

HOW THEY MOVE THROUGH LIFE:

Constant Motion vs. Steady Rhythm

EMERGING PLAYERS



Always connected, multi-platform Short bursts, fragmented attention Entertainment-first mindset

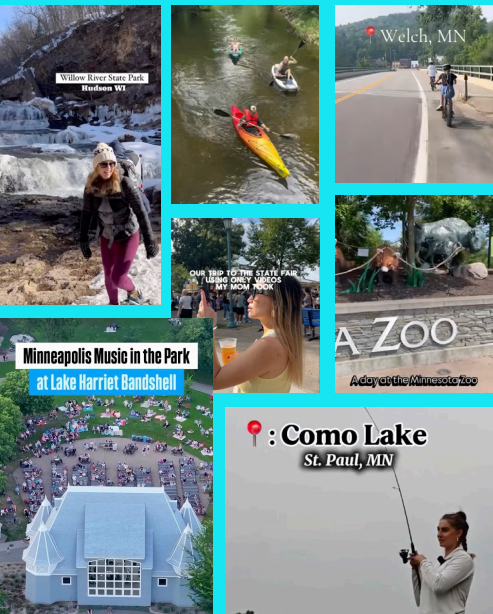
EXPERIENCED PLAYERS



Fewer platforms, more focused use Longer, predictable sessions Information + routine-driven

WHERE THEY ALIGN:

OUTDOORS



SOCIAL



Both groups spend a lot of time outdoors, but **Emerging Players** make plans only days in advance.

Both groups are very social, but the **Experienced Players** are much more family focused.



EMERGING PLAYERS

A YEAR IN THE LIFE

Their year is driven by moments, not routines. Each season brings new energy – spring and fall for exploration, winter for socializing indoors, and summer as a peak of spontaneity and events. They follow what feels exciting in the moment, with spending and behavior rising alongside social momentum. Lottery fits in as an impulse – something they do when the timing, mood, and opportunity align.



Fall

They go with whatever the moment calls for – **64%** seek out variety in their everyday life. Fueled by a desire for stimulation, they are **48%** more likely enjoy outrageous behavior and situations.

Making the most of crisp days through active outdoor recreation.

Jogging/running 19% 166
Hiking 19% 116

Exploring seasonal attractions and local tasting experiences.

Aquarium attendance 12% 142
Wine tasting 10% 135

Bringing people together around game days and group activities.

Tailgating 10% 221
Trivia games 13% 158

Embracing friendly competition through casual games and recreation.

Pickleball 11% 197
Pool/Billiards 9% 136

Winter

Staying indoors, keeping cozy while keeping the fun going.

They're **33%** more likely to thrive at big parties and social occasions, showing that "cozy" doesn't mean quiet. Hosting is a key outlet, with **71%** saying they enjoy entertaining friends or relatives at home.

Slowing down with cozy hobbies and comfort-driven pastimes.

Collecting - vinyl records 9% 207
Baking 34% 116

Escaping the cold with nights out and indoor experiences.

Comedy club 10% 130
Bars/ night clubs 31%
Aquarium 12% 142
Go to museums 19% 116

Turning indoor game nights into friendly competition.

Board games 33% 145
Play cards 25% 141
Video/mobile games 93% 114

Keeping fitness routines going through the colder months.

Aerobics 9% 122
Weightlifting 17% 121
Running 19% 166

Spring

Spring taps into their adventurous, expressive side. Their boldness also shows up in self-expression, being **26%** more likely to enjoy standing out in a crowd and **44%** more likely to like to show off what they have.

Expressing creativity through hands-on hobbies and artistic outlets.

Painting, drawing,
Sculpting 14% 133
Photography 12% 113

Connecting over home-cooked meals and lively get-togethers.

Cooking for fun 32% 116
I thrive at big parties and social occasions 39% 133

Taking advantage of warmer weather with active outdoor adventures.

Biking-Road 13% 142
Jogging/running 19% 166

Getting closer to nature through gardening and time on the water.

Vegetable Growing 26% 110
Fishing fresh water 16% 169

Summer

Summer amplifies their most impulsive tendencies – **60%** act on the spur of the moment, and **25%** more likely to desire excitement in life. They bring others along too, being **21%** more likely to organize activities and **27%** more likely to convince others to try new things.

Staying active with sports and outdoor recreation.

Jogging/Running 19% 166
Pickleball 11% 197
Basketball 10% 173

Making the most of summer through live music and festival experiences.

Country music concerts 10% 147
R&B/Hip-Hop/Rap concerts 7% 148
Music festival 9% 135

Exploring the outdoors through water, wildlife, and active recreation.

Walking: Dog Owners 45% 108
Fishing fresh water 16% 169
Kayak/canoeing 9% 132

Spending weekends discovering local attractions and seasonal events.

Zoo attendance 26% 184
Food/Bev festival 17% 118



EXPERIENCED PLAYERS

A YEAR IN THE LIFE

Their year follows a steady, predictable rhythm shaped by routine and tradition. Seasons shift activities, but not mindset – fall and winter center on home and rituals, while spring and summer bring structured outings and events. Decisions are measured, with lottery play occurring occasionally, driven by specific triggers like big jackpots or holidays rather than impulse.



Fall

Fall brings them back to what’s familiar. With **85%** committed to maintaining traditions, routines shape the season – from choosing locally grown foods (**69%**) to staying socially active. They’re **36%** more likely to connect with friends around town, turning everyday rituals into shared experiences.

Growing and enjoying the season’s harvest close to home.

Garden: Vegetable Growing 32% 134

Taking in fall scenery through walks, bike rides, and outdoor adventures.

Walking for exercise 48% 137
Biking 16% 174
Photography 12% 112

Gathering around game days and casual get-togethers.

Tailgating 12% 275
Pickleball 11% 194
Playing cards 35% 195

Following favorite teams and making sports a seasonal tradition.

College Football 66% 130
NFL 79% 135
NASCAR 35% 121
MLB 66% 131

Winter

Winter shifts the focus indoors, where they step fully into the role of host. Nearly half are more likely to entertain at home, and **81%** genuinely enjoy it. It’s a season of holiday gatherings and full houses – keeping connections strong while looking ahead to what’s next.

Keeping entertained with games, hobbies, and at-home recreation.

Exercise: At home 57% 128
Bingo 15% 252
Board games 29% 125

Escaping the house with cultural outings and local attractions.

Go to museums 26% 158
Aquarium attendance 11% 131
Go to live theater 17% 136

Staying connected through winter sports and favorite teams.

College basketball 53% 126
NFL 79% 135
NHL 44% 120

Leaning into cozy hobbies and creative time at home.

Needlecraft And Sewing: 21% 128
Crossword puzzles 19% 130
Baking 41% 141

Spring

Spring is defined by packed schedules and sports. With **93%** being engaged sports viewers. They show up consistently for their families and communities and are **130%** more likely to attend or coach a youth sports event. Travel often centers on connection too, with **55%** more likely to visit friends and relatives.

Channeling fresh energy into creative projects and gardening.

Painting, drawing, sculpting 14% 135
Garden: Flowers/Ornamentals 37% 135
Gardening or yard work: 49% 155
Garden: Herb Growing 19% 119

Exploring local attractions and trying new experiences.

Comedy clubs 9% 121
Attend art galleries or shows 17% 147
Zoo attendance 23% 163

Making the most of warmer weather with active outdoor pursuits.

Walking for exercise 48% 137
Hiking 24% 148
Biking-road 16% 174
Fishing-fresh water 32% 330

Following the season’s biggest championships and and spring openers

NFL 79% 135
NHL 44% 120
MLB 66% 131
Golf 40% 148

Summer

Summer is full but fulfilling, balancing events, gatherings, and personal projects. With **85%** believing life should be as fun as possible, they lean into both play and productivity – whether learning something new (**94%**) or tackling DIY projects (**81%**).

Staying active with long days spent outside.

Bicycling - Road 16% 174
Walking for exercise 48% 137
Hiking 24% 148

Getting out on the water and into nature all season long.

Canoeing/kayaking 14% 198
Fishing - fresh water 32% 330

Filling the calendar with festivals and community events.

Country music performances 9% 131
Rock music performances 18% 144
Engages in Live Music 36% 120
Food/beverage festival 21% 149
State or county fair 33% 220

Rallying around live sports and major summer events.

MLB 66% 131
Golf 40% 148
Tennis 35% 114
NASCAR 35% 121
Olympics 80% 120



EMERGING PLAYERS

A WEEK IN THE LIFE

Their week is split between digital and real life. Weekdays are filled with constant, short bursts of scrolling – checking in, passing time, and discovering new things – while evenings and weekends shift toward social plans and experiences. Media is always on, but rarely the focus. It's a backdrop to their day, making them most receptive in quick, in-between moments rather than long, intentional ones.



Understanding a week in their life reveals when attention is habitual vs. opportunistic and where Lottery can naturally show up without interrupting.

For this section, Prime Lingo, a Nielsen tool, was used to compile media consumption and attitudes among different audiences. We used Minneapolis-St Paul DMA as not all DMAs are available, which also allowed us to have consistency between the two audiences. We applied A18-39 for Emerging Players and A40+ for Experienced Players which aligned with the data seen in MRI. We then compared to two audiences and how they engage with media

EMERGING PLAYER: MEDIA USAGE OVERVIEW



BROADCAST & CABLE

41% of people noted they watched broadcast TV stations within the past 7 days with **44%** watching cable.

TV Daypart Viewing (lined up DPs as best as possible to TV buying)

- 7P-10P (Prime): **31%**, 5P-6:30P (Early News): **16%**, 6:30P-7P (Prime Access): **14%**, 10P-10:30P (Late News): **14%**, 9A-3P (Daytime): **13%**, 7A-9A (Early Morning): **7%**

Cable Network (watched in past 7 days)

- ESPN: **14%**, Adult Swim: **9%**, MTV: **8%**, CNN: **8%**, FOX: **8%**, Disney Channel: **7%**, TBS: **7%**, Freeform: **7%**, Comedy Central: **7%**, BET: **7%**



STREAMING VIDEO

24% of people watched 10-19 hours of TV in the past 7 days, with **23%** watching 5-9 hours per week. Comedies, movies, dramas, documentaries, and mystery/crime are the top 5 genres streamed

Top 10 Networks (used in past 30 days):

Netflix: **69%**, Amazon Prime Video: **61%**, YouTube (free): **60%**, Hulu: **50%**, Disney+: **46%**, HBO Max: **34%**, Peacock: **34%**, Paramount+: **33%**, Apple TV+: **17.3%**, Any: **95%**



RADIO

On average, audience listens to 54 mins (mean) per day (median = 45 mins).

Top Radio Formats

Hot Adult Contemporary: **24%**, Pop Contemporary Hit: **22%**, Classic Hits: **17%**, Country: **17%**, Active Rock: **13%**, Adult Contemporary: **11%**, Unknown Format: **12%**

Radio Dayparts Listened To

PM (3p-7p) **52%**, AM (6a-10a): **48%**, Midday (10a-3p): **47%**, Evening (7p-Mid): **34%**, Weekend: **54%**



DIGITAL APPS/WEB & NEWSPAPER

42% of people reported time spent on the internet was 20+ hours on an average week. **19%** reported 5-9 hours and **17%** reported 10-19 hours.

Newspaper Readership - Any Newspaper

- Daily: **22%** reported printed, **14%** e-edition
- Sunday: **16%** reported printed, **11%** e-edition

Digital Website Usage

- **19%** reported looking at the newspaper website in the past 7 days.

When looking at other website usage in past 30 days, the following were in the top 5-10:

- **News/Sports (Top 10)** – ESPN: **15%**, NYTimes: **8%**, MLB: **7%**, NHL: **7%**, NBA: **6%**, CNN: **6%**, NFL: **6%**, FOXNews: **6%**, USAToday: **5%**, ABCNews: **4%**

Social Media

- **73%** of audience reported using Facebook in the past 30 days, **64%** Instagram, and others like Reddit, TikTok, Snapchat, etc.



STREAMING AUDIO

84% streamed audio within the past 30 days. **59%** reported listening to paid audio with **42%** listening to free. **40%** listened to a Podcast, **60%** did not.

Top Audio Apps (used in past 30 days):

Spotify: **51%**, YouTube: **28%**, Apple Music: **16%**, Pandora: **15%**, Amazon Music: **15%**, iHeart: **8%**, SiriusXM: **5%**, Other: **4%**, AccuRadio: **2%**



TRANSPORTATION

Visited Gas Station: daily (**23%**), few times a week (**21%**), once a week (**16%**), few times a month (**14%**), rarely (**13%**)



TRANSPORTATION APPS

(Used past 30 days): 66% report using Google Maps in the past 30 days, followed up The Weather Channel (**37%**), and Apple Maps (**30%**) as the top 3



EMERGING PLAYERS

A DAY IN THE LIFE

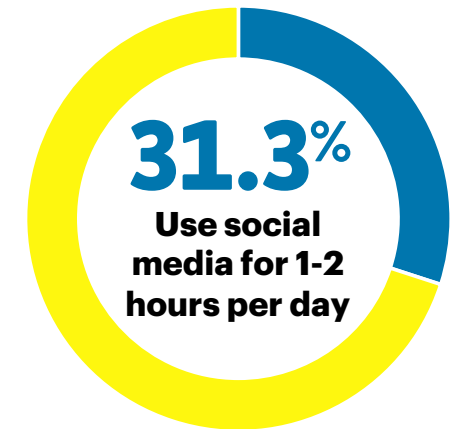
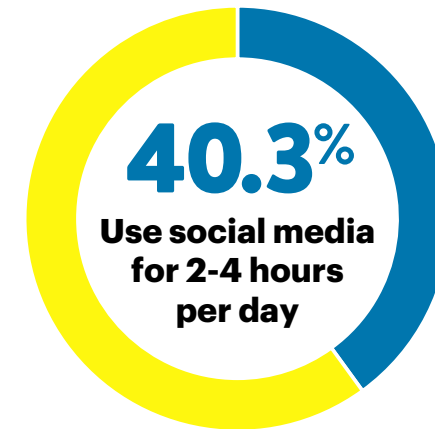
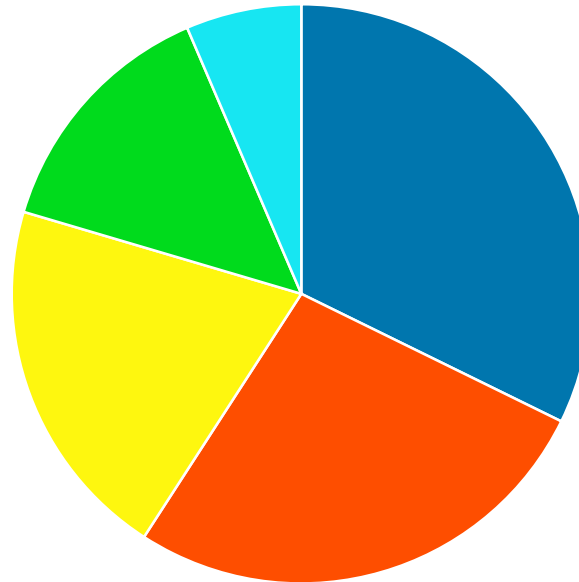
Their day is made up of constant, quick check-ins. Mornings start with a fast scroll to catch up, afternoons are filled with fragmented moments of browsing and discovery, and nights are dedicated to longer, passive scrolling and entertainment. Social media is always within reach and used to fill time, follow trends, and stay connected – making their attention frequent but fleeting.



Understanding a day in their life reveals how social media fits into micro-moments when people are most open to quick, emotional, and scroll-stopping engagement.

Channel Preferences

- Instagram
- TikTok
- YouTube
- Facebook
- Snapchat



Primary Reasons:

1. Entertainment 54%
2. Staying Informed 23%
3. Background Noise 16%

THE DAY STARTS WITH A QUICK PULSE CHECK

60% of adults 18-30 always or often use their phone to browse the internet or use apps within 10 minutes of waking up.

AT NIGHT, SCROLLING BECOMES THE MAIN EVENT

61% of adults 18-30 & **43%** of Americans always or often use their phone to browse the internet and use apps within 10 minutes of falling asleep at night

75% of U.S. adults use at least one major social media platform before going to bed each night

SOCIAL FILLS EVERY EMPTY MOMENT

For the age group 18-25 **82%** primarily use media for entertainment and **53%** say TikTok is their top social platform, while **77%** have played the lottery in the past year.

For 25-34 year-olds, **44%** use media for entertainment, **28%** for staying informed, **70%** have played the lottery, and **18%** say Facebook is their top platform (**16%** TikTok)

SOCIAL IS ALWAYS WITHIN REACH AND ALWAYS IN MOTION

It's where the Emerging Players watch, talk, shop, discover and pass time.

FREQUENT ATTENTION BUT RARELY FOCUSED

Emerging Players create constant opportunities to connect, but attention is fleeting and driven by mood. The most effective moments are quick, entertaining, and emotionally engaging ... especially at night when they're most open, but least intentional.



EXPERIENCED PLAYERS

A WEEK IN THE LIFE

Their week is consistent and routine-driven, with predictable media habits built into each day. Mornings start with quick news check-ins, days are filled with light, occasional engagement, and evenings are anchored in longer, passive viewing like TV or streaming. Audio, especially music, follows them through commutes and errands. Their behavior doesn't spike – it repeats, making them most reachable through steady, habitual touchpoints.



Understanding a week in their life reveals when attention is habitual vs. opportunistic and where Lottery can naturally show up without interrupting.

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EXPERIENCED PLAYER: MEDIA USAGE OVERVIEW



BROADCAST & CABLE

76% of people noted they watched broadcast TV stations within the past 7 days with **63%** watching cable networks

TV Daypart Viewing (lined up DPs as best as possible to TV buying)

- 7P-10P (Prime): **66%**, 5P-6:30P (Early News): **51%**, 9A-3P (Daytime): **47%**, 6:30P-7P (Prime Access): **43%**, 10P-10:30P (Late News): **42%**, 7A-9A (Early Morning): **30%**

Cable Network (watched in past 7 days)

- ESPN: **19%**, CNN: **15%**, Fox News Channel: **14%**, HGTV: **14%**, Discovery Channel: **13%**, History: **13%**, Food Network: **13%**, TNT: **12%**, Hallmark Channel: **10%**, Paramount Network: **10%**



STREAMING VIDEO

24% of people watched 1-4 hours of TV in the past 7 days with **21%** watching 5-9hrs per week. Movies, comedies, documentaries, drama and mystery/crime are the top 5 genres streamed

Top 10 Networks (used in past 30 days):

- Netflix: **56%**, Amazon Prime Video: **55%**, YouTube (free): **39%**, Hulu: **37%**, Paramount+: **29%**, Peacock: **29%**, Disney+: **26%**, HBO Max: **20%**, Apple TV+: **17%**, Roku Channel: **17%**



RADIO

On average, audience listens to 74 mins (mean) per day (median = 64 mins).

Top Radio Formats

Country: **27%**, News/Talk: **26%** Hot AC: **25%**, Classic Hits: **23%**, Classic Rock: **19%**. Unknown Format: **24%**

Radio Dayparts Listened To

AM (6a-10a): **61%**, Midday (10a-3p): **65%**, PM (3p-7p): **64%**, Evening (7-Mid): **36%**, Weekend: **71%**



DIGITAL APPS/WEB & NEWSPAPER

33% of people reported time spent on the internet was 20+ hours on an average week. **23%** reported 10-19 hours and **20%** reported 5-9 hours

Newspaper Readership – Any Newspaper

- Daily: **34%** reported printed, **21%** e-edition
- Sunday: **22%** reported printed, **18%** e-edition

Digital Website Usage

- 29%** reported looking at newspaper website in the past 7 days.

When looking at other website usage in past 30 days, the following were in the top 5-10:

- News/Sports (Top 10)** – ESPN: **11%**, NFL: **11%**, CNN: **10%**, FOX News: **9%**, MLB: **8%**, New York Times: **7%**, NHL: **5%**, ABC News: **4%**, NBC News: **4%**, CBS News: **4%**

Social Media

- 82%** of audience reported using Facebook in the past 30 days, **43%** Instagram, and others like LinkedIn and, X, etc.



STREAMING AUDIO

62% streamed audio within the past 30 days. **36%** reported listening to paid audio with **37%** listening to free. **26%** listened to a Podcast, **74%** did not

Top Audio Apps (used in past 30 days):

Spotify: **20%**, Amazon Music: **14%**, YouTube: **13%**, Pandora: **12%**, Sirius XM App/Web: **12%**, iHeart: **10%**, Apple Music: **8%**, Other: **5%**, TuneIn: **1%**



TRANSPORTATION

Visited Gas Station: daily (**7%**), few times a week (**19%**), once a week (**28%**), few times a month (**31%**), rarely (**16%**)



TRANSPORTATION APPS

(Used past 30 days): 71% report using Google Maps in the past 30 days, followed up The Weather Channel (**44%**), and AccuWeather (**28%**) as the top 3



EXPERIENCED PLAYERS

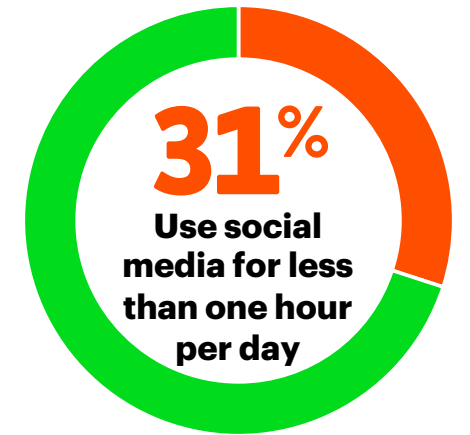
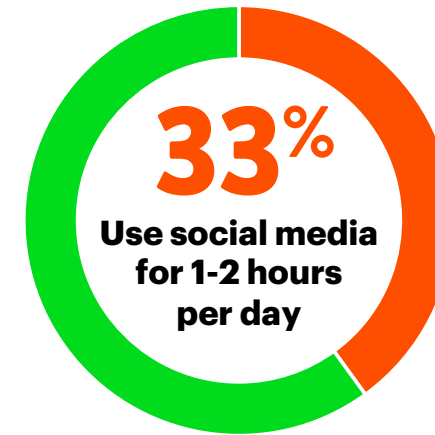
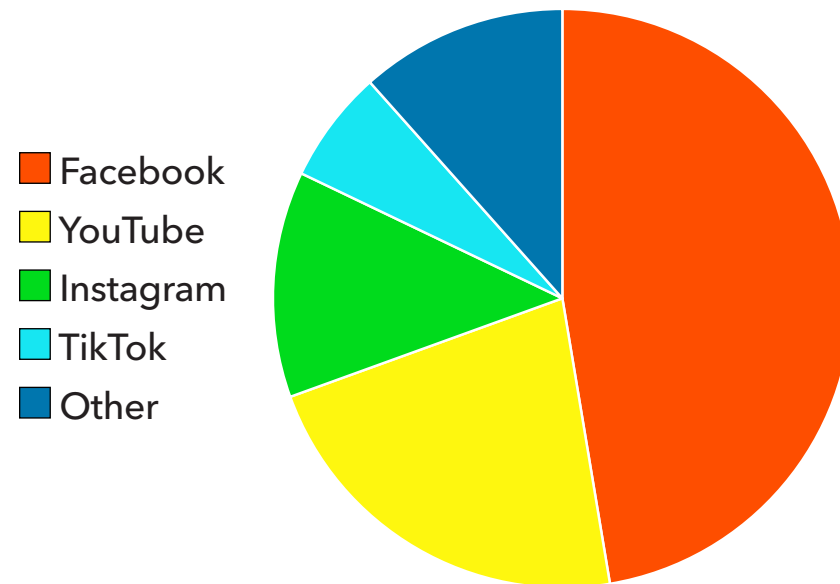
A DAY IN THE LIFE

Their day follows a more structured media rhythm. Mornings begin with a habitual news check-in, afternoons include light, occasional browsing tied to interests or needs, and evenings are focused on longer, more passive consumption like TV or Facebook. Social media plays a supporting role used to stay informed and connected but not constantly engaged.



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Channel Preferences



Primary Reasons:

1. Staying Informed 45%
2. Entertainment 31%
3. Connecting 12%

MORNINGS ARE BUILT ON FAMILIAR ROUTINES

Mornings are anchored in habit. They check Facebook or news apps to get updates on what's happening – local news, current events, and activity from friends and family. The time spent on social media is short and part of a larger routine.

EVENING IS THEIR TIME TO SLOW DOWN

Evening/bedtime is a meaningful "wind-down" mobile engagement window for 35+ audiences.

SOCIAL FITS INTO THE DAY BUT IT DOESN'T DEFINE IT

For the Experienced Players, social is for when there is a small opening. The quick "let me check" or "what should I make?" moments.

SOCIAL IS USED WHEN THERE IS A REASON

Social is a familiar, low-effort way for the Experienced Players to stay connected, catch up, and unwind. Not a trend-chasing space.

Facebook is the #1 platform for Experienced Players.

LESS FREQUENT BUT MORE GROUNDED ATTENTION

Experienced Players offer fewer daily touchpoints, but their attention is more stable and intentional. Messaging that is clear, relevant, and aligned with their routine is more likely to resonate than fast, trend-driven content.