

The National Lottery Back to Brand

Best Ongoing Use of TV

June 2021



18+ Play Responsibly,
Play For Fun



National
Lottery

ENTRY DETAILS

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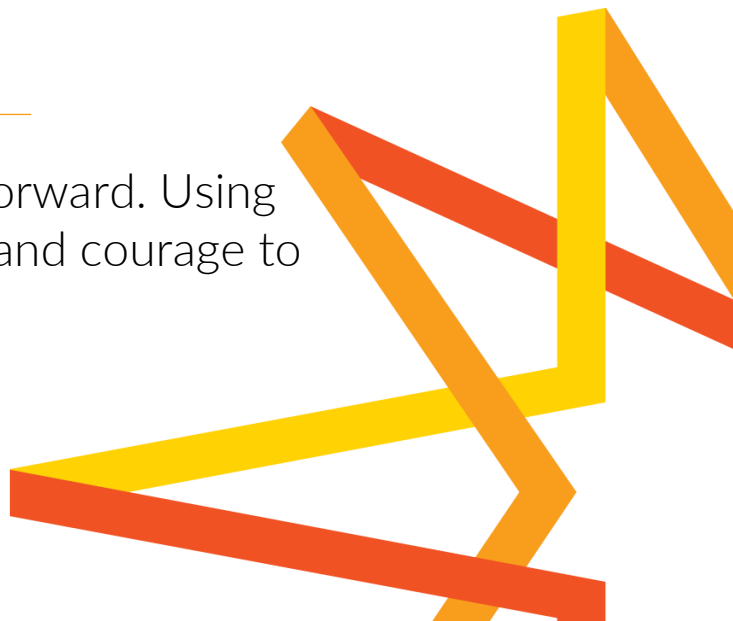
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Entry Title

The National Lottery – Back to Brand



A story of going back to go forward. Using heritage, data, consolidation and courage to find a new growth trajectory.



BACKGROUND & OBJECTIVES

National Lotteries are unusual. They are often established in difficult economic times, to fund the things that the exchequer can't afford. The Irish national Lottery is relatively new. Founded in 1986 during a deep recession, **its role was to fund initiatives central our cultural heritage**. Something the exchequer simply couldn't afford. Prizes were modest but interest enormous. In recessionary Ireland the dream of winning was tantalising, it gave people hope and allowed them to dream.

However, **Celtic Tiger culture was damaging to the brand**. For a buoyant exchequer, its founding purpose was less vital and less publicised. The excesses of the time meant it came to be seen by the general public as a means to get rich quickly, as an opportunity to join the private jet party and the champagne lifestyle.

In the recessionary and recovery years that followed, play numbers declined. A series of price increases were necessary, but these, coupled with some changes to the games' structures meant odds lengthened. Rising prices and lengthening odds could lead to further declines in play.

By 2019 the brand needed a lift. Play numbers across the main games were declining. A growing cohort of lapsed players believed winning was a pipedream and thought of play as a tax on the naïve.

We needed to get people to believe again and give them a reason to play.

Optimisations in channel mix using econometrics meant the brand was increasingly visible but sentiment and play were falling.

CHANGES IN THE PAST 18 MONTHS

ADVERTISING VISIBILITY	+10%
NPS SCORE	-10%
CLAIMED REGULAR PLAYERS	-10%

Source: Red C Tracker 2017-2019

BACKGROUND & OBJECTIVES

The brand's original purpose had fallen from public consciousness, and the master brand itself had also lost prominence. **97% of marketing budget was spent on promoting jackpots and prizes**, mostly of the brands' two largest games: Lotto and EuroMillions.

Advertising
different games
with their own
product
identities had
diluted the
Masterbrand.



The brand, and its reason for being, had diminished - we needed to bring this back to life!

Objective 1

At a business level we needed to **grow revenue (Target +1%)** by increasing the **number of weekly players (Target +6%)**.

Objective 2

To succeed, we needed to remind people of our founding purpose, that we were **a force for good in the community (grow to 54%)**. We also needed to grow the belief that **winning was possible (Grow to 62%)**.

Objective 3

Finally, we needed to re-establish the master brand; The National Lottery itself, and make sure that it was remembered (**grow Spontaneous Brand Recall from 46% to 49%**) and thought of in key purchase occasions.

THE BRAND STORY OVER TIME



Dreaming of winning the jackpot... that's what we relied on as the communication platform. And it worked, it worked until it didn't work anymore. Since 2014 the focus of communications had been focused on maximising reach of Jackpot advertising to drive ticket sales, pumping ads out 48 hours prior to all draws. At the start, we saw uplift in sales particularly on large Jackpot amounts. This was **rigorously optimised over a five year period** to become more efficient using ongoing econometric modelling but **play numbers started to fall**. It was evident there was a problem that the product focus of our communications couldn't fix. We needed to give people another reason to play, a reason to reappraise playing.



This **led us back to the original purpose of The National Lottery** which was established to fund important initiatives to the public. This concept was forgotten and unknown to younger players. The National Lottery supports causes all over the country and our players were contributing to the greater good but they didn't even know it!

THE BRAND STORY OVER TIME



The National Lottery funds thousands of Good Causes every year, but research showed that 84% of people couldn't name a single one. **Almost 30c from every €1 spent goes back to communities** across the country. We decided to make this a key part of our always-on strategy - For the first time in five years, we promoted the "Good Causes". **A simple, uplifting, TVC would showcase the impact**, while localised campaigns would name specific beneficiaries.



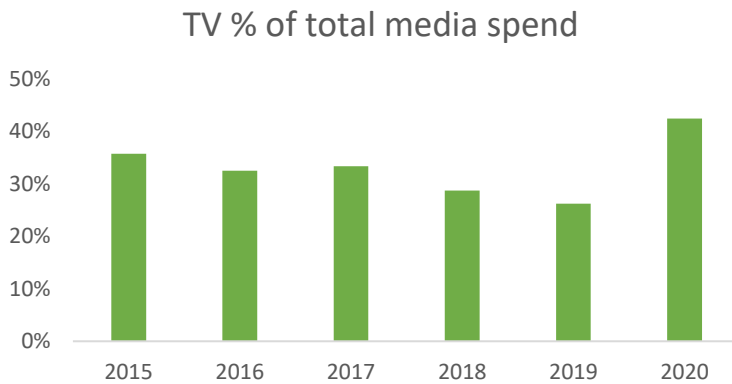
Although awareness of Good Causes is important to the brand, we needed to reignite a belief in the possibility of winning to drive play. The first thing winners often talk about is what they'll do for their friends and families, not themselves. **Rather than just talk about jackpots, we talked about wins.** We talked about people sharing the wins with their families, their communities, and their friends. When we did talk about jackpots, we linked it to the possibilities it creates for people to indulge their fantasy acts of kindness, and the things they might do for others.

Having toyed with new taglines and ways of communicating the possibility that The National Lottery creates for players. In the end, just like our return to the brand's Good Causes heritage we **returned to the 'It Could Be You' tagline which had lasted in the minds of the Irish public** despite being dropped a number of years previous.



THE MEDIA STORY OVER TIME

Always on TV has played an important role in The National Lottery's media mix over the past decade, evolving into an AV strategy over that time. It **has been the backbone of jackpot promotion** and achieving short term reach of key messages. In 2020 we made a **critical pivot in how we use the medium** to drive further growth for both the brand and business.






Jackpot and prize messaging alone was not driving incremental growth. With only a **2-day campaign window for each Jackpot to be communicated** (there are four in a week across Lotto and EuroMillions) it also placed a big constraint on media buying. In order to maximise reach, it required an all adults target audience which skewed delivery older to 55+ audiences. Whilst still relevant, we needed to bring in new audiences and reach all cohorts. It also became more and more challenging to deliver that reach across 2-day campaigns as media habits diversified.



THE MEDIA STORY OVER TIME

In the pivot towards brand comms, AV planning evolved from a 2-day reach to a monthly cover led strategy and an ability to have **greater control over our overall brand reach by audience**. We ensured we gained access to top key programming across all of our brand campaigns with spots running across news, soaps & live sports. The overall the AV strategy took a three-pronged approach summarised below:

Brand Building		Sales Activation
Good Causes	Dream of winning	Jackpot and games
Feel the force for good in communities	Have fun with the possibility of winning	Prompt to play games
5+ July Launch of 60,40 20 secs, followed by 3+ monthly weight 25-44 Targeting across TV and VOD	5+ August Launch of 60,40 20 secs, followed by 3+ monthly weight 25-44 Targeting across TV and VOD	Shorter bursts of 10 or 20 sec jackpot and game copy pre-draw at a 1+ burst weight All adults targeting on TV and social
		

As video is so critical to establishing these emotions and connections with the brand, all film produced is **measured via System 1 before investing in media**. This enables us to ensure ads hit the mark in entertaining the audience and are attributed correctly to the brand using a proven scientific method before they go live.



System 1 testing (results example left) allows us to measure emotional connection, strength of brand connection and ultimately give us a gauge of business effectiveness.

Video has been central to the revitalisation of the National Lottery brand. It is the spine of how we effectively communicate the **Fun, optimism, and generosity** that the brand represents in Irish culture. The tone is set by video, **other channels leverage this impact via consistent use of distinctive assets.** The Elvis 'If I can dream' track established via the EuroMillions island campaign in 2016 is now used across all audio communication opportunities, the colour green is consistent across all visual communications and in more recent times, the Waterslide visual has translated effectively into visual mediums.

Key Media Learnings over time:

- 1. Video's ability to connect with audiences** on a more impactful and emotional level is unique and continues to prove effective for the brand
- 2. Changing viewing behaviours are a challenge,** but they can be overcome by adapting the approach
3. Consistent, diligent use of **distinctive brand assets mean equity can be transferred** between different ads and channels
4. Agility is important when planning always on TV. We **used our brand metrics and sales data** to determine what creative message to push for upcoming months (Good Causes or Win belief)

THE RESULTS

Overall, as a result in our change of Always On TV strategy, we saw **increases across our brand metrics, sales and ROI**.

Brand Metrics

As a direct result of our advertising activity, **we have seen sustained growth in the scores for our two main brand association metrics.**

Force for good in the community - moving annual total score for this metric has grown by +3% points since the beginning of 2020.

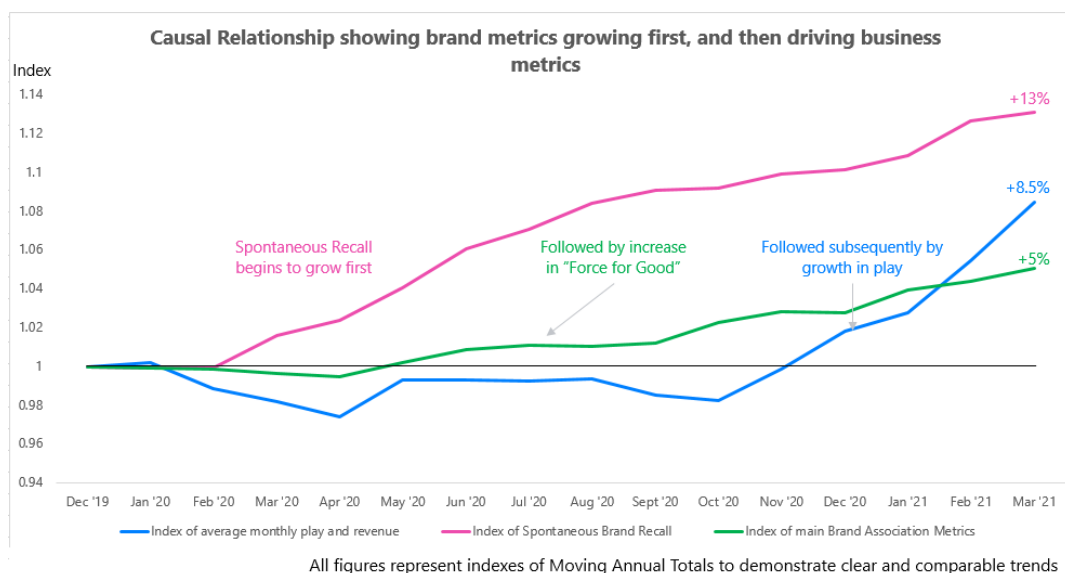
Win Belief – grew by +3% points in the last 14 prior to June 2020

Spontaneous Brand Recall - increased by +5.8% points in the last 14 months, compared to just +3.8% growth in the previous year.

This growth has been further supported by significant growth in the strength of our distinctive brand assets. Of the four we set out to grow we have seen particularly strong results on three.

- Association between the brand and the Elvis track stands at 89%.
- Association with the tag line “It Could be You” stands at 96%.
- Association between the brand, and the previously relegated Cosmo logo now stands at 100%.
- Association with the master brand colour, green is lower at 56%. But considering the previously heavily supported product brands employed a different palette, this is still a strong result after one year.

On average across all four assets our brand association stands 86%. This is what allowed us to evolve out Jackpot Tv strand and use cut-downs of our brand TVCs.



THE RESULTS

ROI

When you strip away all other factors, our Econometric Modelling (conducted by Louise Cook of Holmes and Cook) calculated that our 2020 marketing activity contributed significantly to our top line revenues and profit. For every €1 we spent on advertising, we gave back €17.48 in revenue to the business and €1.92 in profit (€1.92: €1)

These compare very favourably with the median Revenue ROI of 3.99 : 1 and the median Profit ROI of 2.26 : 1 as reported by the WARC ROI benchmarks study (Nov 2020).



“The National Lottery invests in video because it works. There is an abundance of industry evidence to this affect, but we also measure it for our own business specifically using brand tracking and econometric modelling. In 2020, when we made the decision to change tact and invest more in the brand rather than solely on shorter term ‘performance’ campaigns I knew video was central to this and was the first port of call to revitalise the brand. We apply additional rigour to the effectiveness of the film we produce using System 1 testing before go-live and have almost doubled our investment in video YoY with clear evidence of return, both in brand metrics and business results.”

**Paul Dervan,
Chief Marketing Officer
of The National Lottery**

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Thank You



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