

LESSONS FROM SPORTS BETTING ADS

**Lesson #1:
Branding Better for More Wins More Often**

An Ipsos Point of View

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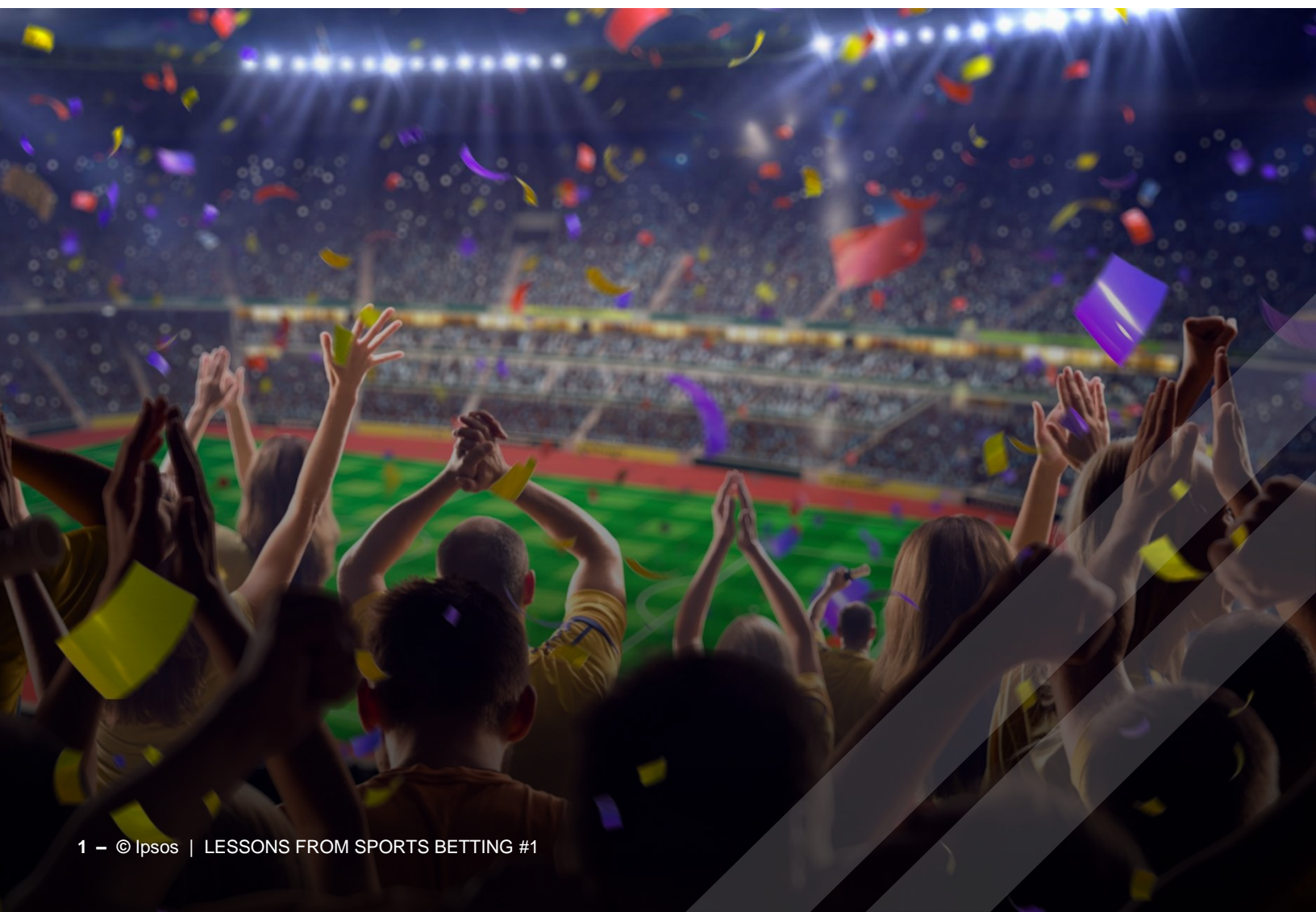
Lessons from Sports Betting #1: Branding Better for More Wins More Often

With Ontario's move to a regulated online gaming market in April 2022, sports betting has been placed squarely in the face of Canadians as one of the most newly publicized industries since cannabis legalization.

Ontario's advertising market has been flooded with messages from major international brands in the sports betting category. Some of these ads used celebrities as spokespeople, while others tried to engage with humorous scenarios involving everyday people. All were designed to give their respective brands an edge.

The Key Question: Did Any Of These Brands Deliver The Winning Score?

To answer this question, Ipsos tested 6 sports betting ads in English Canada (with a focus on Ontario) using our flagship ad creative evaluation solution, **Creative|Spark**. **Creative|Spark** uses a distracted content environment¹ to help understand whether ads and brands stand out amongst other ads.



The ads tested were as follows:

- PointsBet – “Trailer Park Boys”
- PointsBet – “You Think You Know Sports”
- BetMGM – “Shooting Practice”
- BetRivers – “Meet Blair”
- The Score Bet – “10x More”
- FanDuel – “The Holiday”




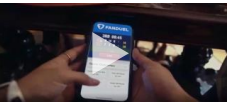


What did we find out? Like in many sports, there are both positives and areas for improvement. Let’s tackle the key wins first.

Key Wins:

Memorability or breakthrough potential. Memorability in **Creative|Spark** is measured by asking consumers to watch 4 TV ads and a movie trailer. This creates a distracted viewing experience and helps us understand if the test ad stands out. To help us understand this, we show de-branded stills of the test ad to consumers and ask a simple question: “Do you remember seeing this ad?” As you can see, all ads tested generated at least average Memorability.

Memory Encoding Index (Avg. Range 85-115)

Click on image to view the ad.

					
Points Bet 'Trailer Park Boys'	Points Bet 'You Think You Know Sports'	BetMGM 'Shooting Practice'	FanDuel 'The Holidays'	The Score Bet '10x More'	BetRivers 'Meet Blair'
132	108	135	107	97	108

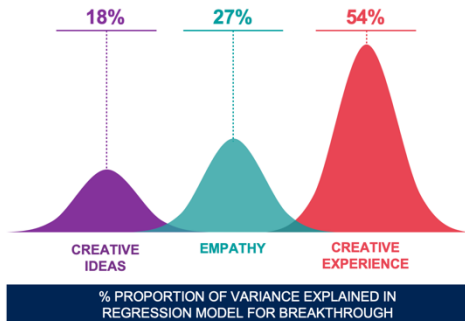
LEGEND

ABOVE | AVERAGE | **BELOW**



Ipsos Misfits

A CREATIVE EXPERIENCE FUELS MEMORY ENCODING



Source: Ipsos Global Ad Testing Meta-Analysis (n=1,734 cases)

All tested ads delivered a positive creative experience for the end audience. In our recent book “Misfits”, Ipsos makes the case that creativity can play a strong role in sparking brand growth. **Delivering a creative experience that is entertaining, unique, and likeable for the end audience generally translates into positive Memorability and is the “cost of entry” to generate brand impact.**

Areas for Improvement:

The key opportunity is **Brand Link¹**, as all the tested ads struggle on this metric. While it is positive that the ads are being remembered, **if consumers do not understand what brand is being advertised, it represents a missed opportunity to maximize brand impact.** Brand Link in **Creative|Spark** is measured after Memorability. If consumers indicate that they remember seeing the test ad, we show the de-branded stills again, and ask: “What brand was this ad for?” We have consumers type in their response vs. giving them a list of brands, as this tells us if the brand is being remembered unprompted.

1. Ipsos has seen consistent declines in TV recall levels in-market over the past 10 years. Given this, when pre-testing an ad, Ipsos believes very strongly in understanding whether your ad can stand out when faced with competing content. Creative|Spark was designed to replicate the distractions of the real world. In the distracted content section of the survey, consumers see 4 different ads and a movie trailer of their choice. After consumers have viewed the ads and the movie trailer, we show them de-branded stills of the test ad and ask them if they remember seeing the ad, and if they say yes, we then ask them to type in the brand, which helps us understand if the ad and brand are remembered.

Brand Linkage Index (Avg. Range 85-115)

Click on image to view the ad.

Points Bet 'Trailer Park Boys'	Points Bet 'You Think You Know Sports'	BetMGM 'Shooting Practice'	FanDuel 'The Holidays'	The Score Bet '10x More'	BetRivers 'Meet Blair'
27	25	52	52	14	40

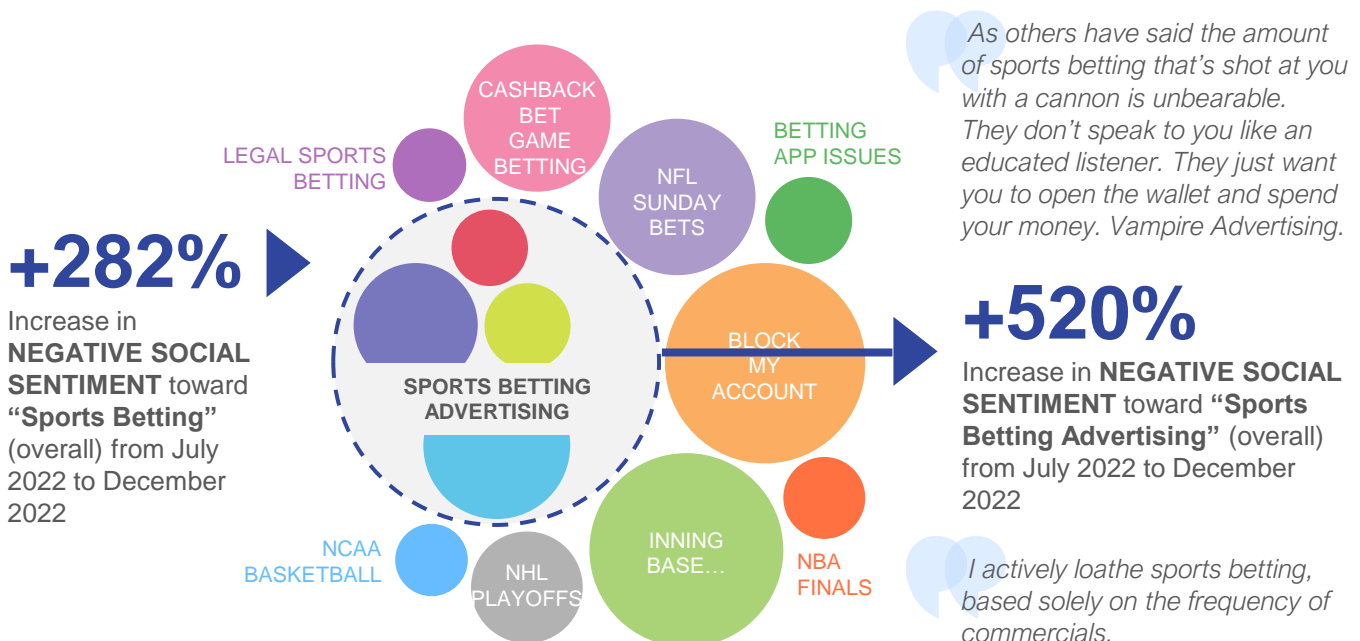
LEGEND

ABOVE | AVERAGE | BELOW

Low Brand Link has some potentially negative consequences.

1. The ads risk advertising for the category vs. their individual brands, which can limit individual brand impact and growth.
2. The ads may be misattributed to a competitor, supporting their brand rather than the ad sponsor. In these scenarios, the best-known brand in the category can benefit from weakly branded ads run by a competitor.
3. The online sports betting advertising landscape in Ontario is akin to what we saw with ads at the outset of the Covid pandemic in that it is a sea of sameness, with no ads or brands truly standing out, which can lead to consumer tune-out or frustration.
4. Related, the sheer frequency of advertising in the category coupled with the inability to remember specific brands, can lead to consumer fatigue and negativity towards sports betting communications as we saw when we looked at online conversations:

Ipsos Topic Model: "Sports Betting" NEGATIVE Sentiment



How Can Online Sports Betting Brands Win?

First, we need to figure out why **Brand Link** is a struggle for sports betting ads. Looking at the ads, we can see a few patterns emerge:

The brands have not been strongly integrated into the stories. In the tested ads, there are some brief shots of the logos and in some cases, the apps, but most of the stories have been built around either the celebrity or highlighting that sports betting is being offered.

- Take the ad we tested for BetMGM. The story is built on Connor McDavid's misunderstanding that Wayne Gretzky is "chirping" or criticizing him when Gretzky is distracted by his online bet. But it is not fully clear that Gretzky is using a betting app, let alone the BetMGM app, as the brand has not been strongly established.
- BetMGM has an advantage in that they have distinct brand assets from the MGM parent (i.e. the lion) that they could leverage, but in this case it only appears very quickly at the beginning. At no point does the ad mention the brand or that Wayne Gretzky is using the BetMGM app.

We acknowledge that regulations restrict what we can say but, in many ways, no brand has delivered a distinct POV as to what they offer vs. others.

- The positive is that brands in other categories which face regulations in Canada (i.e. beer and alcoholic beverages) have found a way to carve out distinct identities, so it is possible in the sports betting category as well. Below are some examples from the beer category:



Corona



Coors Light

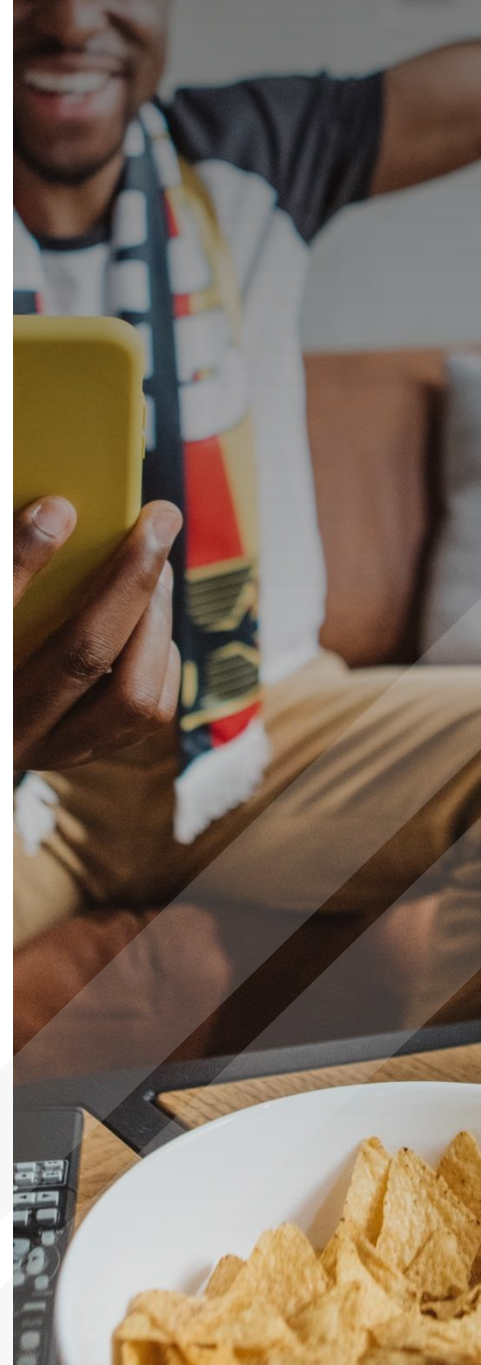
- These beer brands have built a distinct POV – the beach for Corona representing relaxation, the Rocky Mountains for Coors Light representing refreshment, and very much leverage “The Power of You”. Aside from their distinct POVs they have also built distinctive brand assets – the lime, bottle, and beach setting for Corona, for example – which act as a shorthand for consumers to get back to the brand.



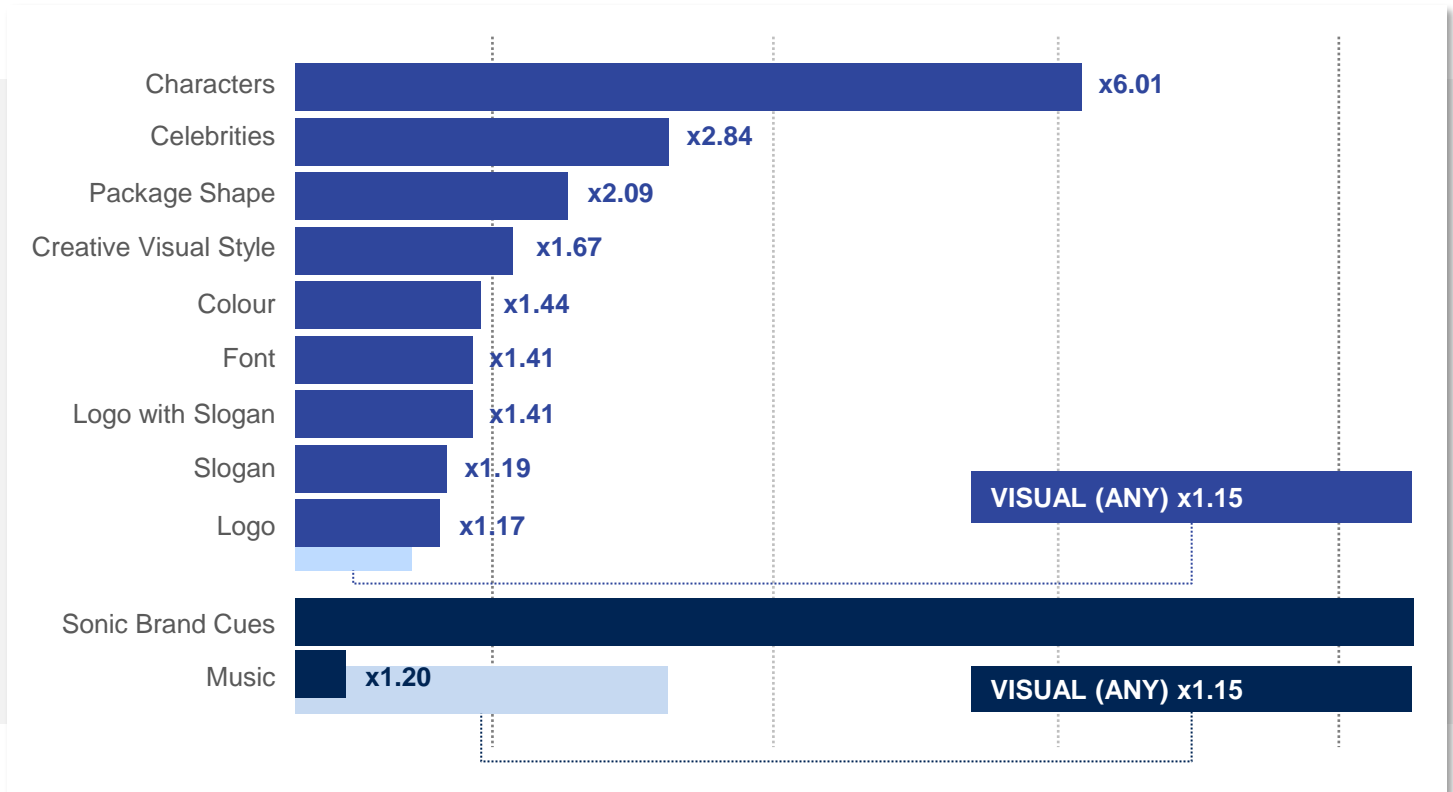
Sports Betting brands can win by delivering a distinct POV as to what the brand has to offer.



BetMGM | Shooting Practice (featuring Wayne Gretzky & Connor McDavid)



Brand Assets Drive Brand Attention



Source: Ipsos Meta Learnings (over 2,000 video ads tested in North America)

- Our learnings above indicate that celebrities can be a key brand asset, but due to the lack of distinction between brands in the sports betting category, they are not strongly associated. This does not mean there is no potential for them to represent a brand, but at this point, their presence is not giving any brand an upper hand.

Key opportunities for sports betting brands to generate a stronger Brand Link are three-fold:

1. Develop a distinctive offer beyond offering betting services. What is your unique position that would make consumers want to use your app over others? Tap into a real consumer insight/tension/passion point and connect the brand with this idea.
2. Build and leverage brand assets, such as celebrities, common creative approaches, sonic brand cues, and visuals. Use these consistently across mediums.
3. Better integrate the brand/brand assets within the story. The brand should be facilitating the story, not just “part of it”.

***The question is: who is going to be the breakout star and win big in this space?
Place your bets...***

Stay tuned for our second POV focusing on the use of celebrities in sports betting ads. You won't want to miss it!

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About Ipsos

At Ipsos we are passionately curious about people, markets, brands, and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions. With a strong presence in 90 countries, Ipsos employs more than 18,000 people and conducts research programs in more than 100 countries. Founded in France in 1975, Ipsos is controlled and managed by research professionals.

About Creative|Spark

Assess and maximize creative potential to achieve short and long-term effects for your brand in as little as 24 hours. Creative|Spark captures realistic attention metrics in a true to life distracted environment and observes the reality of how people view content and make choices. It draws from multiple scientific disciplines to measure a range of thoughts, feelings, and emotions, alongside sales and equity share validated outcome measures.

