

The Ongoing Impact Of COVID-19 & Gatherwell Services To Good Causes



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Who are Gatherwell

Gatherwell is an External Lottery Management Company, we are the team of people who run the lotteries behind the scenes. Typically, we launch lotteries for Operators and Good Causes to use as a sustainable, digital fundraising solution. We host and maintain the platform and websites and run the lottery draws as well as providing ongoing support with marketing materials and other initiatives to Operators and Good Causes.

Purpose

A lot has changed since we first began operating back in 2013. Our operational style has adapted as we have gained a wealth of experience from our own in-house lotteries as well as from the growing network of lotteries we provide to Operators. In recent times we have developed additional services that enable us to reach out and help Good Causes in their quest for fundraising through their supporting lottery mailbox.

We designed a Lottery Survey to gain a better understanding of the ongoing impact of COVID-19 and for an insight, directly from the Good Causes we support, on the services provided. The responses are to be used to steer the development of our ongoing support.

Methodology

At the end of October 2020 a total of **6145** Good Causes across **69** multi-cause Lotteries were sent the survey and **1495 responses** were received. It consisted of 16 questions covering two key areas:

- The impact of COVID-19 on Good Cause fundraising
- Insights into Gatherwell Services

It was incentivised with a £100 donation to the winning Good Cause, drawn at random from all complete survey recipients.

The results of the questions are explored and expanded upon including details on the open responses provided to some questions by Good Causes, some of which is for internal use and some can be shared in this report.

This report is intended to be read by Lottery Operators and Good Causes within the Gatherwell network and contains a 'Plain English' approach, free of jargon, to facilitate this goal.

Results

The impact of COVID-19 on Good Cause fundraising

More than half of the Good Causes confirmed that, **apart from their lottery**, they had been **unable to do ANY form of fundraising** during lockdown, with almost **70% not trying any new methods** of fundraising. Almost **60% of Good Causes** who said that the lottery helped keep funds coming in during COVID-19 also said that, apart from their lottery, they were unable to do **ANY** form of fundraising during lockdown.

Insights into Gatherwell Services

Some very interesting results with extremely valuable insights that will steer the direction of our support strategy to Operators and Good Causes. Social media channels scored the highest in terms of utilising the Administrator Dashboard marketing materials.

84% of the Good Causes that saw the additional resources area on the Gatherwell website found it helpful.

National bolt-on prize ideas – A positive response from all options provided with lots of additional suggestions.

Conclusions

90% of Good Causes report their **fundraising income being negatively** affected with almost **80%** saying the **lottery helped keep funds coming in** during COVID-19.

The lottery, being online, is a 'COVID-19 safe', sustainable and reliable fundraising solution for Good Causes nationally.

Many Good Causes need **help to understand how to promote their Brand through their Lottery** to fundraise effectively and would appreciate **more advice and assets** as well as **more promotion of the Lottery from the Operator** and incentives, such as the national bolt-on.

Recommendations

Communication – Assess and improve Communications to Operators and Good Causes – sharing more on what is happening across the board **improve efficiencies** for all and ensure **quality** messaging to help with promotions and ticket sales.

Resources – Develop and share more resources on an ongoing basis using the **Additional Resources area** on the Gatherwell website as a 'hub' – sell more tickets and grow healthy fundraising income for community fundraising and Good Causes

Enable, Inspire, Motivate – Both Operators and Good Causes, through resources and communications – sell more tickets and recruit more good causes

Back in the 'old' norm many moons ago...



At the start of the year reports were emerging of a deadly virus in China. Most of us oblivious of the severity of what was about to unfold continued living our 'normal' day-to-day life until early March when the UK began to grind to a halt.

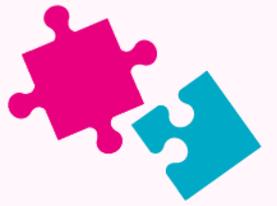
As events rapidly unfolded throughout March restrictions became tighter and tighter to such an extent that people were furloughed, all events cancelled, kids couldn't go to school and lockdown struck. It was time for everyone stay safe to protect the most vulnerable in our communities and ensure essential services could operate effectively.

Experts immediately warned of resulting issues such as:

- Food Poverty
- Mass unemployment
- Mental health problems
- Recession

There have been many reports released about the impact on fundraising but, we wanted to hear it from the Good Causes directly supported through the Gatherwell Lottery family.

Where does Gatherwell fit?



Established in 2013, we are proud to now host 80+ lotteries, the majority of which are those that provide a platform for local Good Causes to raise valuable funds, online, for free. We are an award winning External Lottery Management Company who are currently Lottery Operator Of The Year, awarded by the Lotteries Council.

When the global crisis struck we were acutely aware that we wanted to do more to reach out to the Good Causes registered, as understandably most lottery operators were unable to do so. We fast forwarded development plans and implemented a method to reach Good Causes via their Lottery provider as well as executing an emergency COVID-19 action plan. This included designing and delivering the additional resources area on the Gatherwell website earlier in the year and communicating this out to all Good Causes registered at that time.

We are now in a position where we want to understand how effective the services are so we can be sure to drive ongoing initiatives in the right direction.



The survey

We value the opinions of the Good Causes that are part of the Gatherwell network. Despite there being an abundance of information on the impact of the pandemic it was extremely important for us to hear directly from the Good Causes that our Clients lotteries support.

- A) To understand the impact of COVID-19 on their fundraising
- B) For insight about the resources and additional services we provide – with a view to developing these further as part of our ongoing support

A total of 69 Multi-Cause Lotteries were included in the survey reaching 6415 Good Causes across the UK. This was the cohort for our survey. We received a 27% response rate. Respondents included causes involved in the following:

Schools/PTA, Animal Welfare, Sporting Associations/Groups, Community Centre, Community Group, Health & Wellbeing, Transport & Vehicles, Parks & Open Spaces, Heritage, Library, Museum, Entertainment, Carers, Counselling, Disability, Elderly, Youth and Others.



Objectives of the survey



We set out to answer the following questions:

- How has local fundraising been affected by COVID-19?
- To what extent have Good Causes been able to continue fundraising during lockdown periods?
- Do they expect current fundraising challenges to continue into next year?
- How does the change in fundraising income impact upon their Good Cause?

Since we recently developed a way to communicate directly with the Good Causes we also wanted to understand:

- What is useful from the marketing material we provide?
- What causes think are the most effective national prizes to promote to their supporters?
- Was the additional resource area created on the Gatherwell website during lockdown helpful? And What was helpful from it?
- What else we can do to help?

“It’s undoubtedly an extremely challenging and uncertain time for the third sector across the UK.

It is crucial for any organisation that supports this sector with their fundraising to understand the scale of and nature of the issues they are facing as a result of COVID-19.”

BEN SPEARE,
MANAGING DIRECTOR OF GATHERWELL LTD



METHODOLOGY

The survey was designed and conducted on [SurveyMoneky](#), questions focused both on the assessment of the impact of COVID-19 and around the resources and services provided through our lottery platforms.

An invitation to complete the survey was emailed to 6145 Good Causes who are registered to the multi-cause lottery platforms provided by 69 Gatherwell Lottery Operators. Email reminders were sent after 7 and 14 days. There was also a 'Win £100 for your Good Cause' prize draw offering to the recipients who committed the time to complete it.

The survey was opened to responses on the 15th October 2020 and closed on the 30th October 2020 – a total of 15 days. All responses were anonymous. No identifying data about the respondents was gathered except for the type of Good Cause they represented. In order to be entered into the prize draw the recipient was required to provide their email address and the name of the lottery they are registered to.

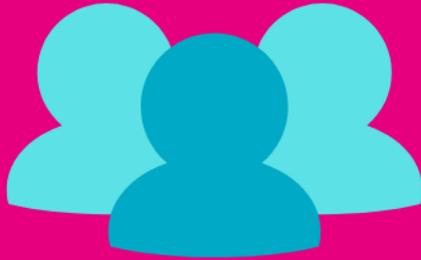
The survey comprised of 16 questions, 8 in relation to COVID-19 of which 7 were multiple choice and one was for optional written response.

Another 5 questions related to lottery services one of which was another optional written response question.

The last two questions asked for the name of the lottery they were registered to and for their email address for entry into the £100 prize draw, both also optional.

The draw took place on the 4th of November with 1495 entries using random.org to select the winner of the £100. The winning Good Cause was **St Mark's School Association, Cold Ash** from West Berkshire Lottery.

INSIGHTS



6145 CAUSES INVITED

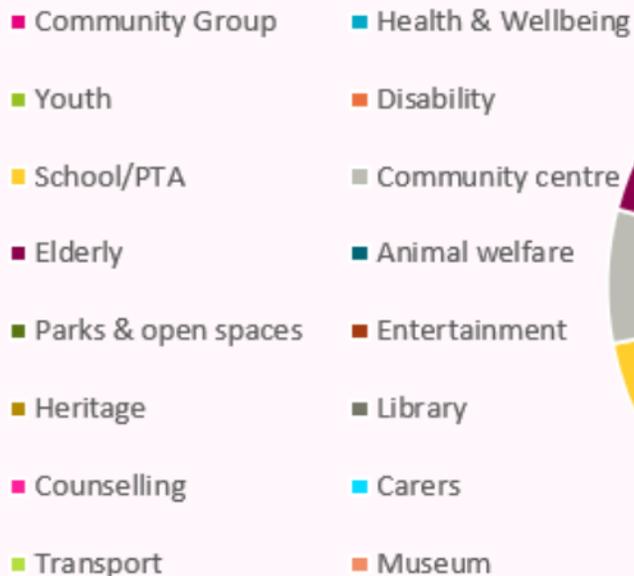


1754 CAUSES RESPONDED



27% RESPONSE RATE

Overview of responding cause categories



- The survey received 1754 responses over a 15 day period.
- The estimated time to complete the survey was 4 minutes, 1 second. 92% of respondents completed the entire survey.
- In line with the composition of the mailing list the highest volume of responses were from causes who primarily support the following Community Groups, Health & Wellbeing, Sporting Association/club, Youth, Disability and School/PTA.
- An overview of the responding establishments is shown on the left. (Further on this later in Q9s detailed response)

PART 1 – The ongoing impact of COVID-19



78%

78% of Good Causes said that their **lottery** had helped them keep **funds** coming in during COVID-19



OVERVIEW OF THE COVID-19 RESULTS

Summary of the responses from 1751 Good Causes. A response rate of 27%



84%

of Good Causes said that COVID-19 is having a negative impact on their fundraising



97%

of Good Causes reported having to cancel fundraising events as a result of COVID-19



55%

of Good Causes stated that **(apart from their lottery)** they had been unable to continue **ANY** form of fundraising with the restrictions imposed because of COVID-19



97%

of Good Causes expect COVID-19 to continue to affect their ability to raise funds over the next six months



78%

of Good Causes said that their lottery had helped them to keep funds coming in during COVID-19



PART 1 – The ongoing impact of COVID-19 findings in detail

Q1 – Q9



Q1

Has your group/organisation been forced to cancel events because of COVID-19?

Answer choices...

- Yes
- No

CANCELLED

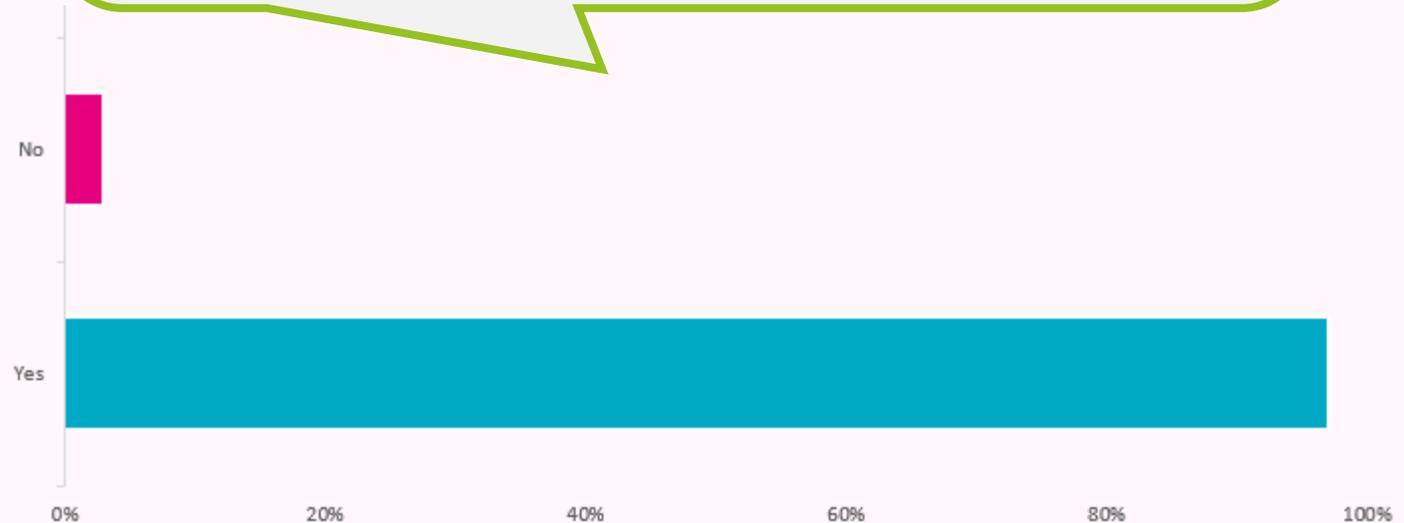
CAUSES SAID...

97% OF GOOD CAUSES HAVE BEEN FORCED TO CANCEL EVENTS

“It will leave our **organisation** at **risk of closure** unless we are able to make back some of the **shortfall** in income from our **cancelled events**.”

“We’ve experienced an **80% drop in revenue** and have had to **cancel** our annual family fun day and Christmas **events** which impacts our campaign work.”

“We’re **down 60%** on commissioning income from school closures, fundraising income, **specifically from cancelled events** and cancelled challenge events.”



Q2

Apart from your lottery, have you been able to continue fundraising during lockdown?

Answer choices...

- Yes
- No

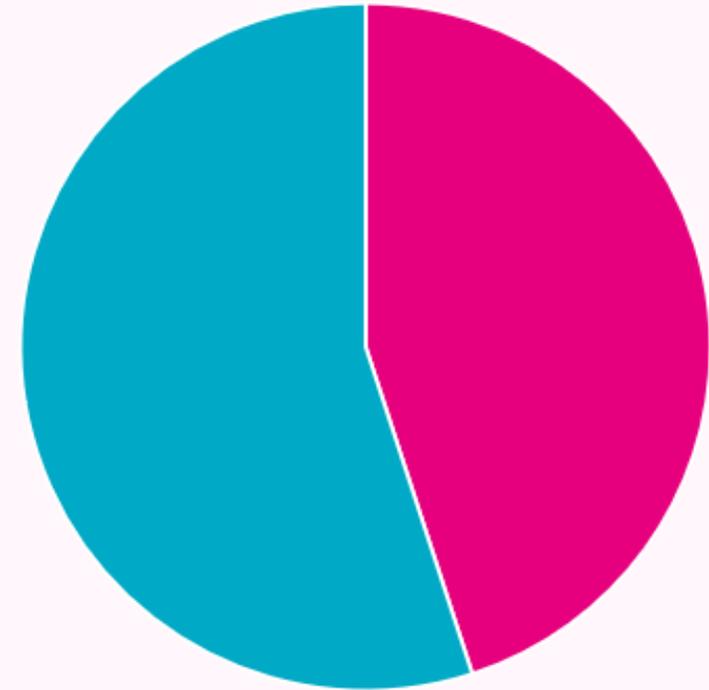
CAUSES SAID...

55% OF THE CAUSES SURVEYED HAVE BEEN **UNABLE TO CONTINUE FUNDRAISING**

“As a **small charity** with no fundraising at all this year we **could be forced to close**, as it is, we **can not provide any life saving equipment.**”

“We **need to purchase** a new boiler for the winter and **may not be able to do this without additional fundraising.**”

“We **will not be able to fund the club** and pay for the pool hire once any funds from previous **fundraising Pre COVID**, have been **exhausted**. If this happens we will have **no means to sufficiently fund the club**”



Q3

Have you tried any new methods of fundraising as a result of COVID-19?

Answer choices...

- Yes
- No
- If yes what did you try... (optional)

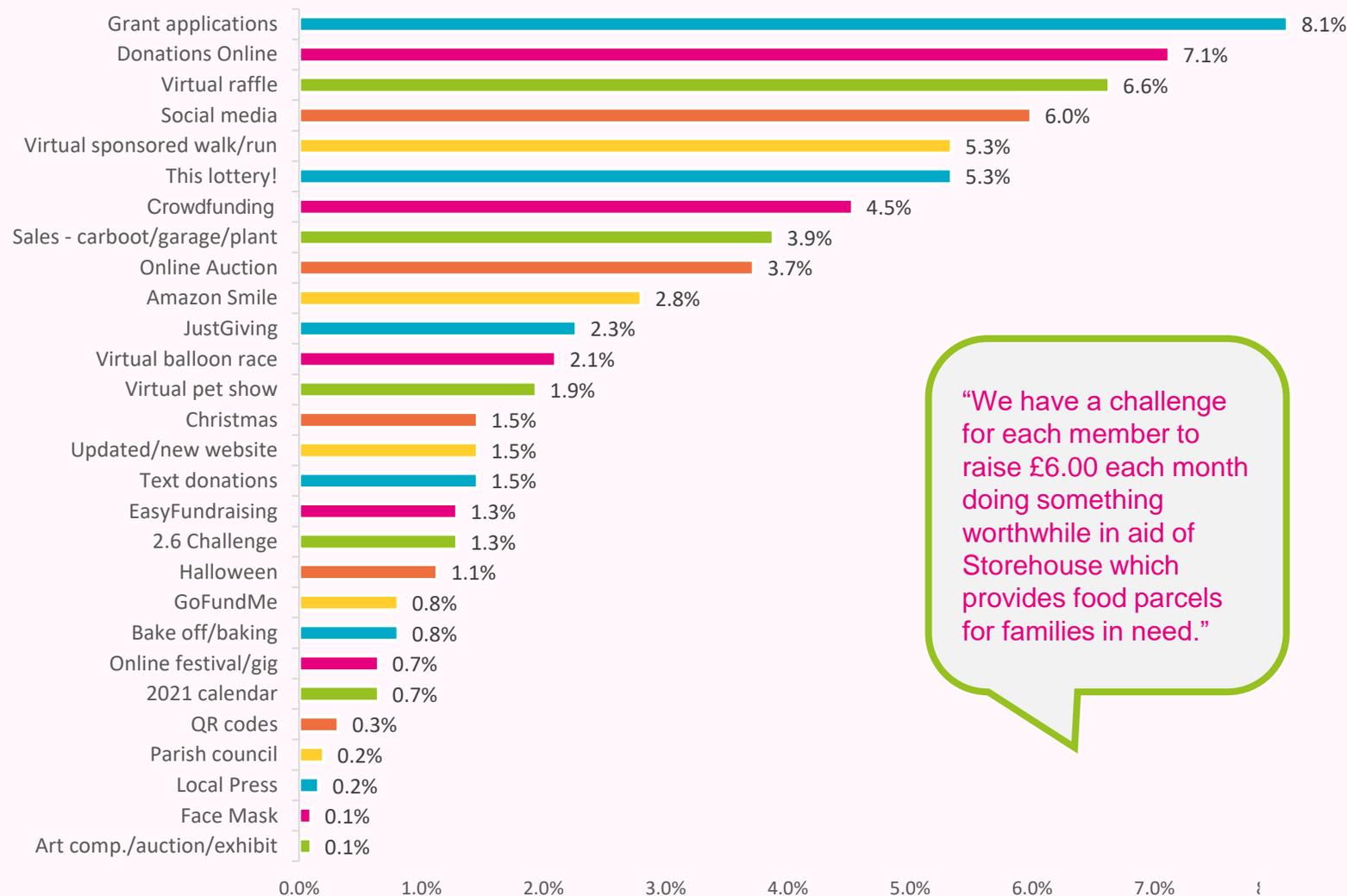
618 Good Causes provided the optional response. This has been analysed and the results are to the right.

CAUSES SAID...

54% NO

42% YES

35% SHARED WHAT THEY TRIED



“We have a challenge for each member to raise £6.00 each month doing something worthwhile in aid of Storehouse which provides food parcels for families in need.”

Q4

How has your group/organisations income from fundraising been affected during COVID-19?

Answer choices...

- Negative
- No change
- Positive

CAUSES SAID...

84% NEGATIVE

11% NO CHANGE

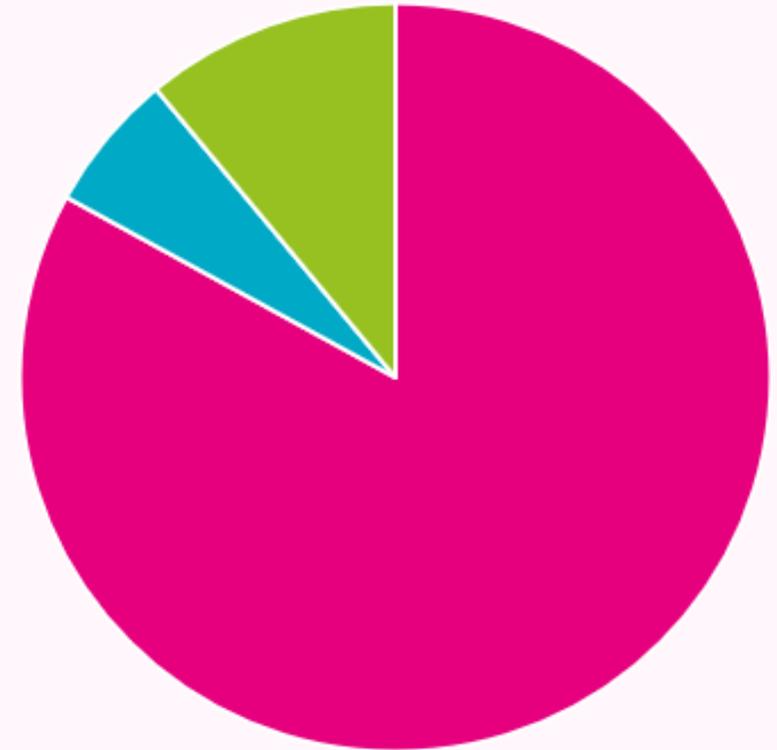
6% POSITIVE

“We have had an **increase in referrals** and a **decrease in donations**, we are having to try very hard to fill this gap. If we can't then **young people** will have to **wait for counselling sessions** with us.”

“**Less money** to assist those in need within the community.”

“**Reduction** in balances, **closure** of facilities, **loss** of volunteers.”

“We have had to bring in lots of **cost cutting** measures and work longer **hours unpaid**.”



Q5 How will the change in income from fundraising affect your group/organisation?

“We **rely on fundraising** to raise money for the day to day running of the **Community Bus**. We are in a **critical position** with no income coming in. Hard times ahead but staying positive.”

“We have to **look for new ways** to keep the football club running so the **children aren't disadvantaged** especially when football can help both **physically and mentally**.”

“The dogs will get **less treats**.”

“We very much **wanted to increase our community activities** and provide a place for people to meet and chat over a brew and cake, we were particularly hopeful of helping local groups, elderly, mental health, general support groups, this **sadly is not possible** due to the restrictions.”

“Many dogs will **not** get their **veterinary care**.”

“**Loss of income** from rental of premises will **not** enable us to **deliver the drop-in Warm Hub monthly soup & roll mornings during the winter**.”

“We will be **less** able to provide **assistance** items for **deaf children** and their families.”

“**Less** projects for **Defibrillators**, meaning **less** coverage in the UK and therefore a **smaller footprint** for public machines. Also due to Covid19 **people are less likely** now to **attempt CPR** and a rescue due to fear of infection.”

“Difficult to cover **running costs**. Also **impacts our welfare fund** which we use to help **parents who are struggling to pay** subs but it is so important for their children to be able to attend and we want to help them by waiving charges.”

“**Funding** for our projects to improve our disabled facilities have **slowed** down as donors have used their resources to help combat the Covid crisis which is totally understandable. Also **events** that we planned have not been able to take place. We have also **lost much contact with volunteers** and those who support us in so many ways. We just hope the Virus will soon be gone and that confidence to come out and enjoy our activities will return and that we shall be able to support especially the lonely and disabled once again.”

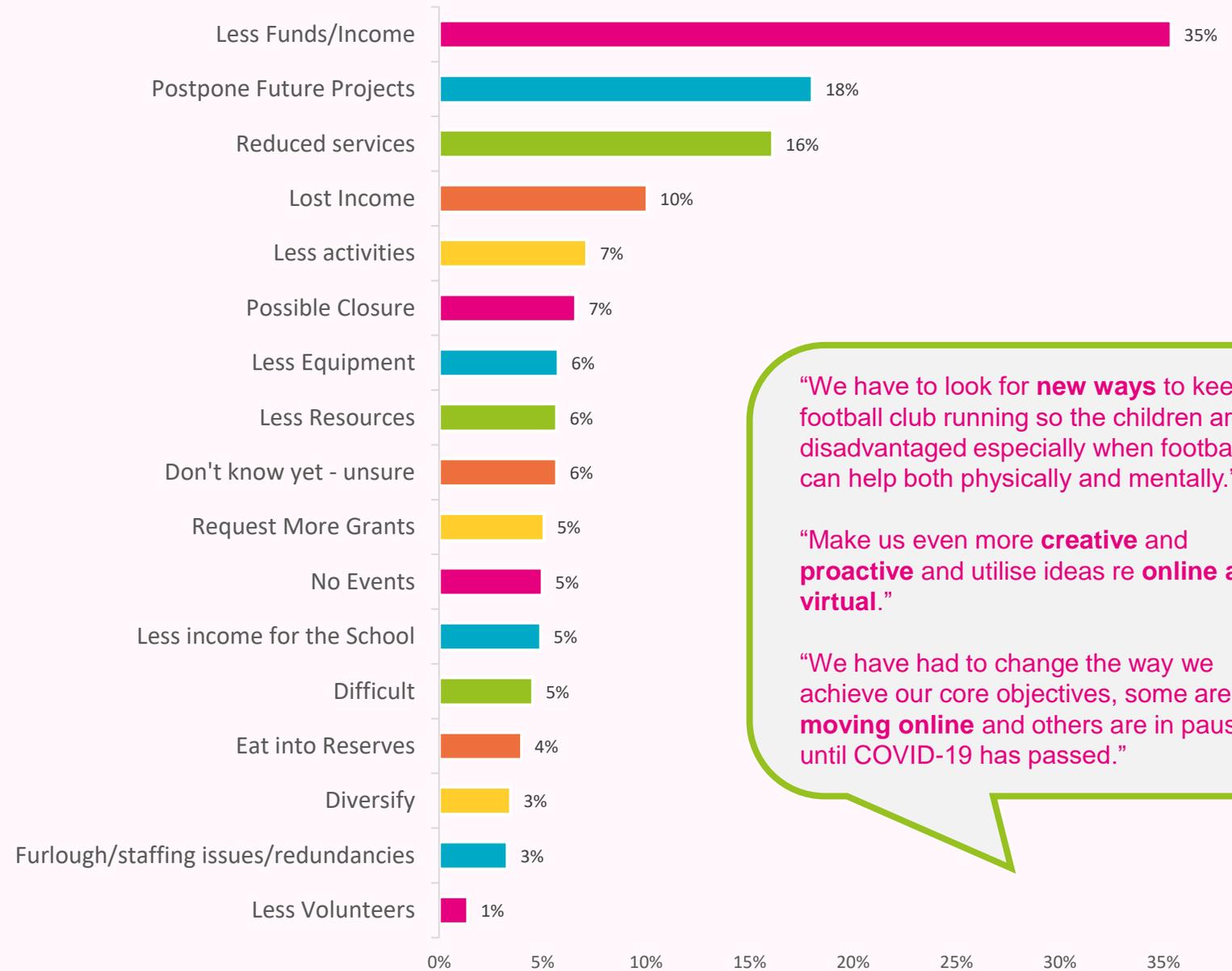
“We had planned to carry improvements around our lake during the spring but **lockdown prevented that**. The money we would have spent on that project stayed in the club funds. We have suffered a slight drop in membership this year so we may have to use some of the money to make up the **shortfall** in income. This means **cutting back on our improvement plans for next year**.”

Q5 continued...

How will the change in income from fundraising affect your group/organisation?

Answer: optional
1303 responses

CAUSES SAID...



"We have to look for **new ways** to keep the football club running so the children aren't disadvantaged especially when football can help both physically and mentally."

"Make us even more **creative** and **proactive** and utilise ideas re **online and virtual**."

"We have had to change the way we achieve our core objectives, some are **moving online** and others are in pause until COVID-19 has passed."



Q6

How do you think COVID-19 has affected the income of your participants?

Answer choices...

- Less household income
- About the same household income
- More household income

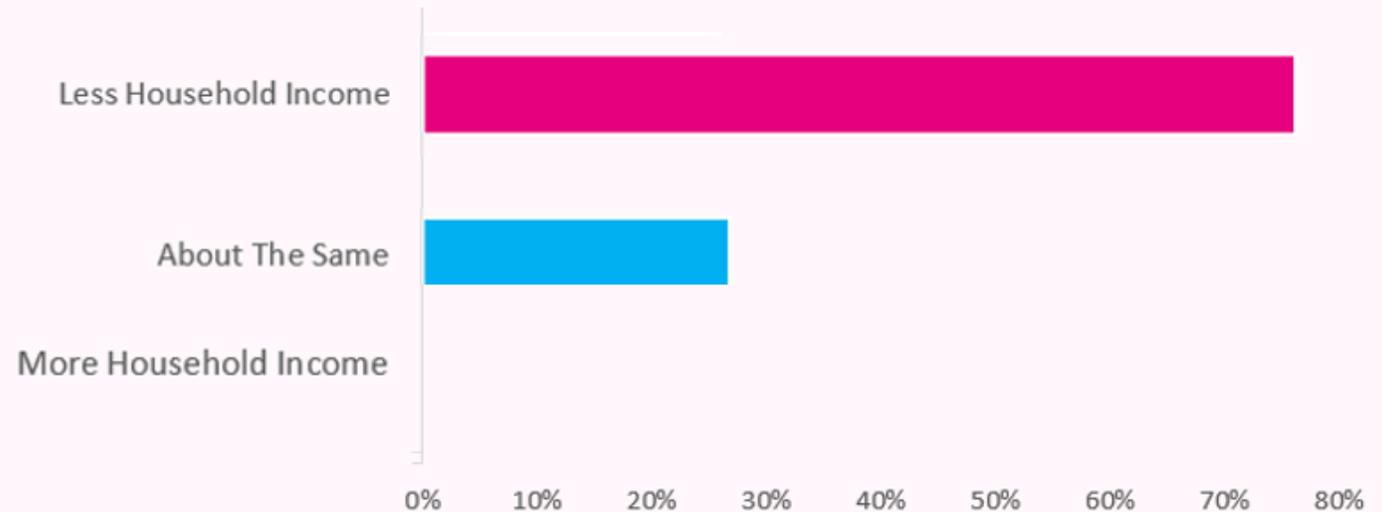
CAUSES SAID...

74% OF CAUSES SAID THEIR PARTICIPANTS HAD LESS HOUSEHOLD INCOME

“Restructure of staffing with **redundancies**.”

“Sadly it’s a **difficult** time for our families. Some are now **loosing** their **jobs**, receiving **significantly less income** or seen their **business affected**.”

“We have had to make **redundancies**, less work.”



Q7

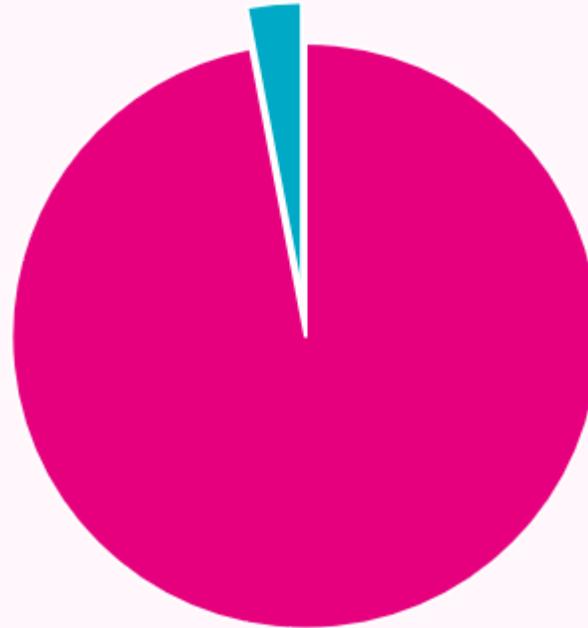
Do you expect COVID-19 to continue to affect your fundraising over the next 6 months?

Answer choices...

- Yes
- No

CAUSES SAID...

97% OF CAUSES EXPECT COVID19 TO AFFECT THEIR FUTURE FUNDRAISING



“It leaves our **future precarious.**”

“We are fundraising specifically to purchase our land, **we do not expect** this level of fundraising to be **sustained.**”

“We need reserves and core funds, we will be **down** on community fundraising by **appx. £5000** this year by not having information stalls/events etc.”

“With **no extra income** we **cannot plan for the future.**”

“It puts a **bleak** look on our **future.**”

Q8

Has our lottery helped to keep funds coming in during COVID-19?

Answer choices...

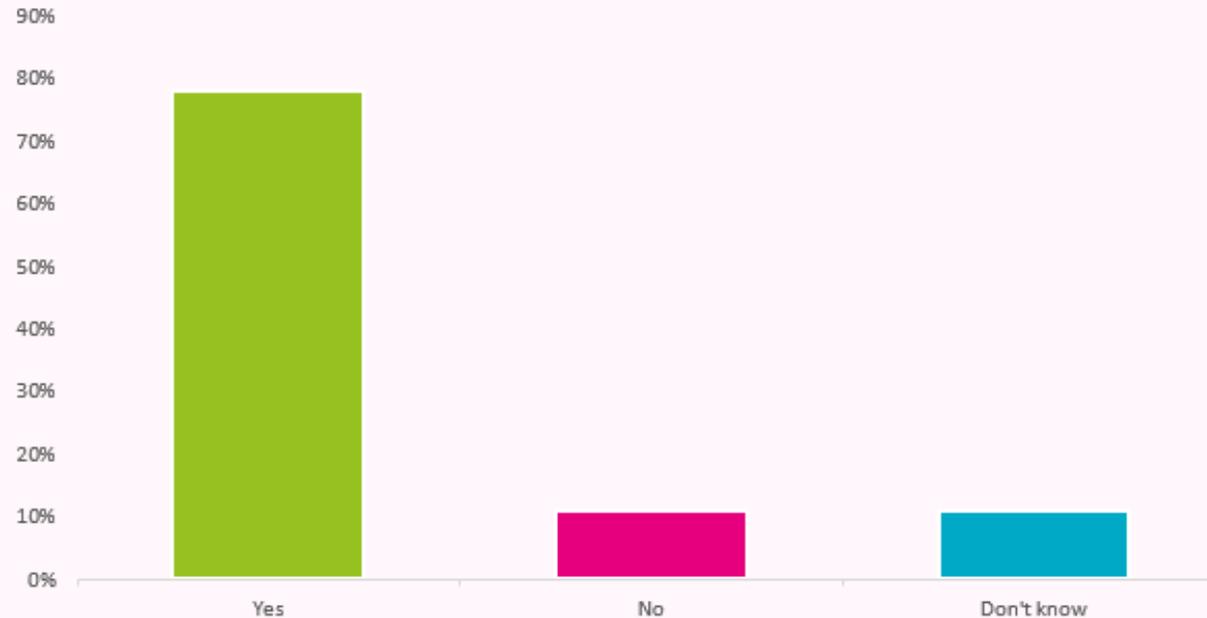
- Yes
- No
- Don't know

CAUSES SAID...

78% OF CAUSES SAID THAT THE LOTTERY HELPED KEEP FUNDS COMING IN DURING COVID-19

"The support of the lottery has supplemented the loss of regular income."

"We'll be promoting the lottery more! It has been a lifeline. Thank you from us all."



Q9

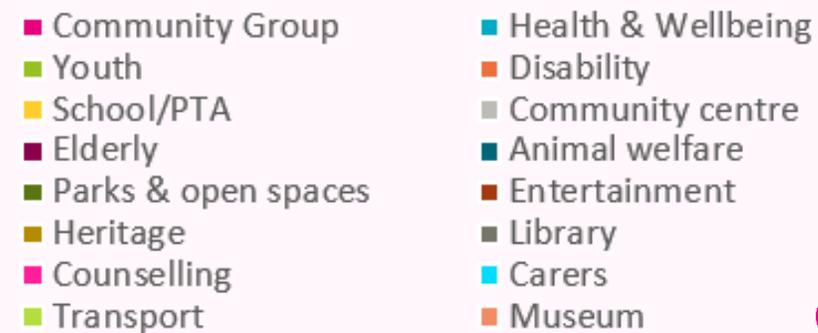
Which of the following best describes what your group/organisations primary purpose?

Answer choices...

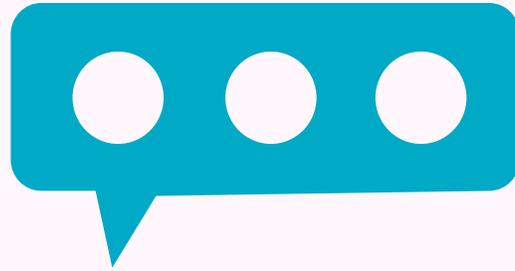
- School/PTA
- Animal Welfare
- Sporting association/club
- Community centre
- Community group
- Health & wellbeing
- Transport & vehicles
- Parks & open spaces
- Heritage
- Library
- Museum
- Entertainment
- Carers
- Counselling
- Disability
- Elderly
- Youth
- Other (370)

CAUSES SAID...

Cause type	Response
Community Group	17.85%
Health & Wellbeing	15.07%
Youth	10.85%
Disability	10.04%
School/PTA	9.36%
Community centre	6.14%
Elderly	3.22%
Animal welfare	2.85%
Parks & open spaces	2.73%
Entertainment	2.60%
Heritage	1.98%
Library	1.30%
Counselling	1.05%
Carers	0.93%
Transport	0.87%
Museum	0.87%



PART 2 – Gatherwell Services Results



INSIGHTS ON THE SERVICES & RESOURCES PROVIDED BY THE LOTTERY



Summary of the responses from 1751 Good Causes. A response rate of 27%

40%

of Good Causes said they use the Lottery assets on their own website and emails



37%

of Good Causes reported using the 'print leaflet' from their Lottery Good Cause Administrator Dashboard



50%

of Good Causes said that they use the Lottery digital leaflet from their dashboard



15%

of Good Causes that they used the marketing materials from their dashboard on Instagram



Instagram

76%

of Good Causes said that they use the Facebook assets from their Lottery Good Cause Administrator Dashboard



INSIGHTS ON THE ADDITIONAL SERVICES & RESOURCES PROVIDED BY GATHERWELL

Summary of the responses from 1751
Good Causes. A response rate of 27%



45%

of Good Causes
said that they would
like to see more
'Tech' prizes in the
national draws



7%

of Good Causes requested more
group funding when asked about
national bolt-on prizes. For example,
one for you and one for your Good
Cause.



67%

of Good Causes said that
they would like more
vouchers offered
as prizes in
the national
draws



84%

of Good Causes that have seen the
additional resources area from
Gatherwell said that they found it
helpful



42%

of Good Causes
said
that they wanted
more cash prizes
and more winners
on the lottery



gatherwell

PART 2 – Responses to Gatherwell services findings in detail

Q10 & Q14



Q10 continued...

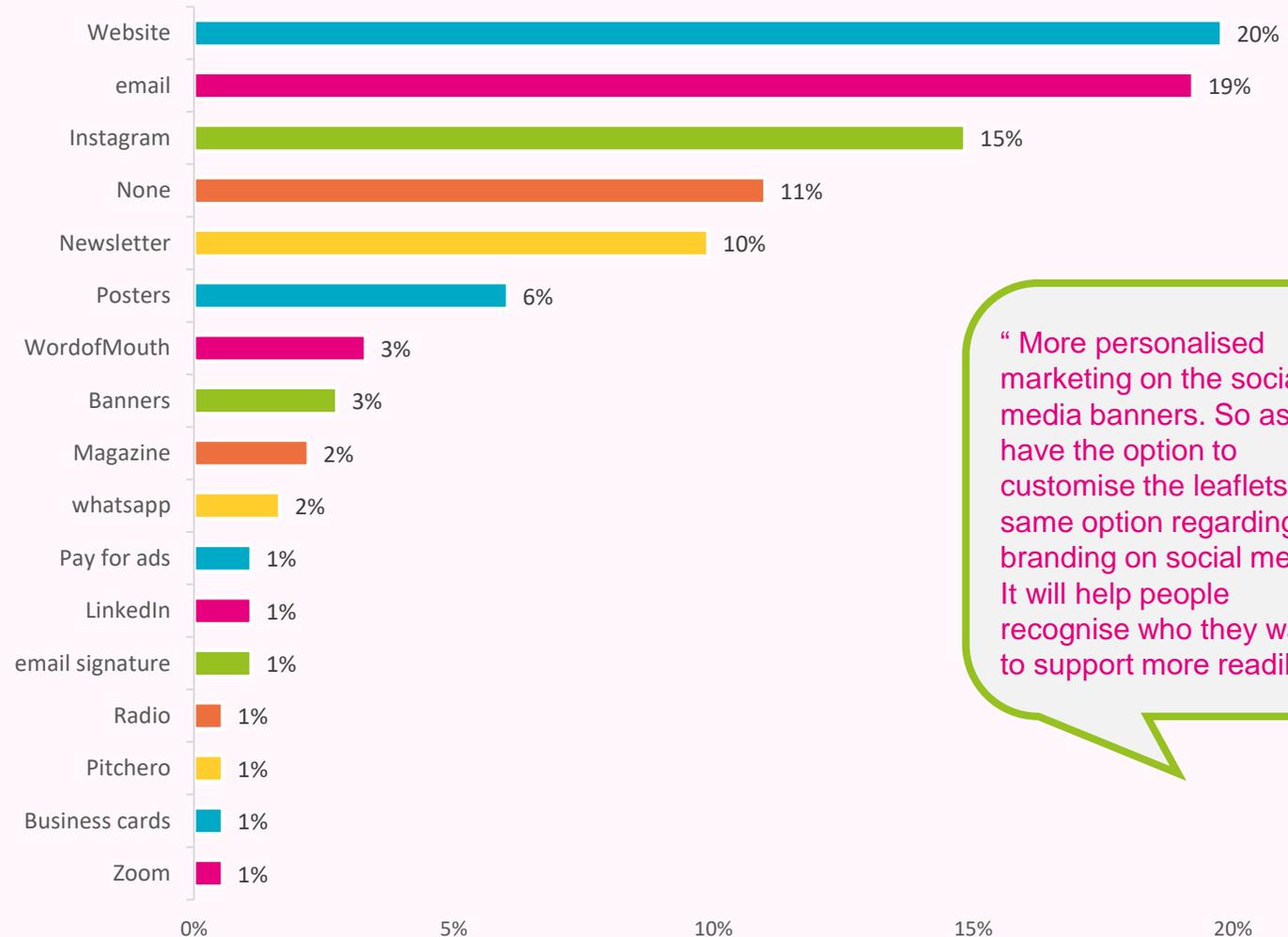
Of the marketing materials we provide on your Good Cause Dashboard, what do you use? Please select each option that applies:

Answer choices...

- **Other – 182 responses** were reviewed for key words, the results are to the right.

CAUSES SAID...

11% OF RESPONDANTS ANSWERED 'OTHER' AND GAVE FURTHER INFORMATION ON WHAT THEY USE TO SHOUT ABOUT THEIR LOTTERY



“ More personalised marketing on the social media banners. So as we have the option to customise the leaflets, the same option regarding the branding on social media. It will help people recognise who they want to support more readily.”

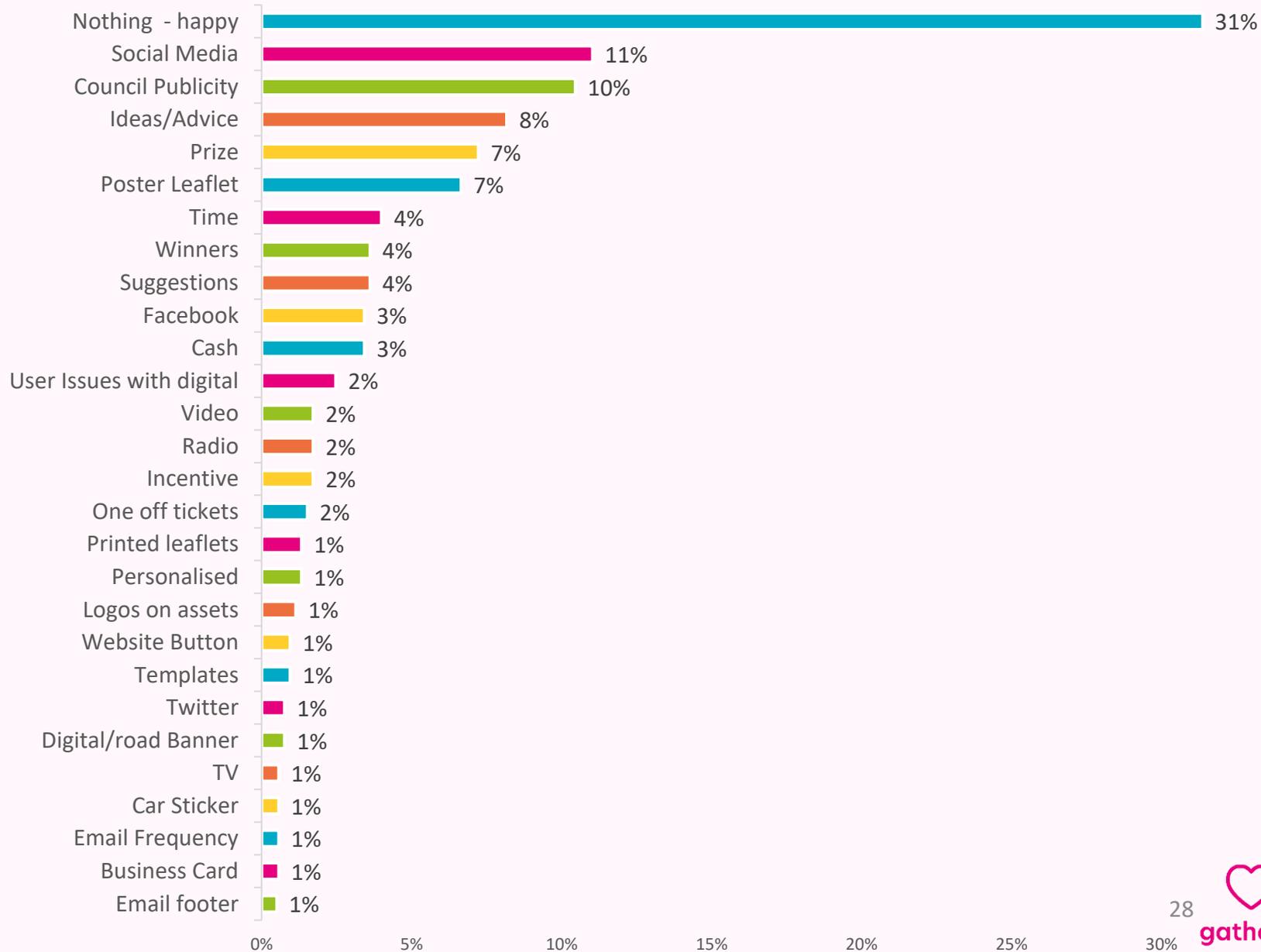
Q14

Finally, we'd love to know if there is anything else that would help you promote your lottery page?

Optional, open response

526 Good Causes responded to this question. The chart to the right is primarily based on 'key word' searches through the data to help filter responses for a more detailed review moving forward.

CAUSES SAID...



Q14 Continued...

Finally, we'd love to know if there is anything else that would help you promote your lottery page?

"Lived in Reading all my life, only found out about this last Friday. I have not seen anything generic on social media about it, you should shout about the good it does for local causes in Reading."

"Difficult to get people interested with Covid taking centre stage."

"More different and personalised **posters** to use on **social media**."

"An automatic section of dispatch addresses where emails can be sent automatically"

"More information on big prize winners."

"Advertising the lottery through the local media channels."

"More time we are a small charity and time is a prime concern we are time poor Its a resource issue."

"Some videos"

"I think there is more that Gatherwell can do to raise the profile across the whole community, so that not each individual charity is sending out the same leaflets/press releases/info as it can get repetitive in a local area with lots of charities registered. An umbrella profile raising campaign would be really helpful."

"We probably haven't made the best use of your promotional tools but most of our (few) members are 'internal' so don't need to have constant reminders. As the 'admin' I find that there are far too many general emails that come out and as a result many get ignored. Keep them down and they will individually have more impact!"



The winning Good Cause said...



"We are a group of parents and carers of children at Cold Ash St Mark's primary school. Our aim is to raise much needed funds for the school, to enhance our children's school experience and create long lasting memories.

I was about to launch our own 100Club where we would sell tickets and hold a monthly draw with cash prizes but at the last minute a friend told me about West Berkshire Lottery. I spoke to a very helpful member of staff who explained everything and we got set up in super quick time and launched it to our school community a week later!

We are currently raising funds to be able to purchase 15 much needed laptops for the school, over the last few months we have held a Fun Run & a Guy Fawkes trail over half term, not just for the families of the school but also the wider community who were encouraged to join in!

Given the current circumstances, fund raising has become much harder as we are limited in the activities we can run. Fetes and social evenings were our main source of income for the school and we are unable to run them. The lottery gives us a bit of security knowing that we do have an income during these times. We have also had a big winner earlier in the year who won £2000!

Do it! It's easy to get started, there is lots of support if you need it, and the money just pops into your charities bank account each month."

Lynne Stafford - Vice Chair of School Association - St Mark's School Association, Cold Ash, Good Cause on West Berkshire Lottery



Q16

Thank you for completing our survey. The results you have provided are anonymous, however, to be entered into the prize draw for the chance for your organisation to win £100, please provide your email address.

1557 Good Causes completed this question resulting in 1495 entries, after removing duplicates. The draw took place on the 4th of November using random.org to select the **WINNER** of the **£100**. The winning Good Cause was **St Mark's School Association, Cold Ash from West Berkshire Lottery**.

The Consequences...

Given the survey findings (summarised below), it's reasonable to predict a very significant drop in the annual funds raised by Good Causes as a result of COVID-19.



Most Good Causes had already been experiencing a squeeze on income with previous economic and financial market downturns typically impacting the level of grants from companies, charitable trusts and major donors.

Evidently, Good Causes have been greatly affected by COVID-19, the impact on their staff, services and participants will vary enormously depending on the nature of their work, income sources and operating model.

For some Good Causes the restrictions implemented around COVID-19 are simply preventing them delivering their vital and valued services. When asked how the income in fundraising will affect the group/organisation one Good cause said,

“Negative cash flow income with outflow cash commitments are a recipe for disaster in the longer term.”

Other Good Causes will find that more is being asked of them, with an already stretched service for the ever increasing mental health battles across the UK, enforced isolation is a factor of anxiety and will likely exacerbate mental health issues. Running costs may, temporarily, be reduced with increasing use of digital media and applications enabling organisations to continue to provide support in the short term.

Another consequence for some Good Causes is where the demand for their services is increasing but there is no ideal substitute for the way they deliver them. Such as residential care and Hospices, who are being asked to deliver more as health care resources within the NHS.

Community fundraising and events are a vital source of income for most Good Causes, providing unrestricted funding that enables them to operate effectively and also raises public awareness of their work. 55% of Good Causes confirmed that, apart from their lottery, they have been unable to continue fundraising during lockdown and 78% said that their lottery has helped keep funds coming in during COVID-19. Restrictions have meant that many Good Causes cannot go about their usual face-to-face fundraising and this has challenged groups to diversify and adapt by developing digital and online solutions.

Gatherwells reaction to the Survey results...

It is important to be realistic for a moment. We had been warned that global pandemics are the biggest risk to mankind by Bill Gates and others around 2015 and even earlier. None of us realised the reality or the impact of this till now and it is highly likely that this is something we may all witness again in the future. Everybody must be prepared moving forward and utilise the tools available to fundraise in a sustainable way. We know that the lotteries we provide do just that and the aim of this report has been to understand how we can support our Operators and Good Causes in achieving the best results from their Lottery.

We have been overwhelmed by the response to the survey and are extremely grateful to all who participated. Given the findings of the severely increased financial pressures for the majority of Good Causes and the dependence on their lottery as a steady and secure source of funds, our mission is to better enable both lottery Operators and Good Causes to happily and confidently raise funds through their lottery.

We will use the insight on the resources and additional services we provide to develop future plans. By developing the ongoing support and resources that we provide, we hope to improve Good Causes confidence and skills in making the most of their lottery by using it as an effective fundraising tool. We will also be providing helpful guidance to lottery Operators in managing a healthy lottery.



Key considerations

Communication

- Must be **quality, engaging, informative and not excessive** – system emails and comms to Operators and Good Causes
- **Share more** information about the services provided and future plans

Resources

- The Gatherwell website resources area for Good Causes will be a **'hub'** for useful information so new Good Causes do not get neglected and current Good Causes do not get repetitive messaging
- The answers and additional suggestions provided around the **national offer prizes** are going to be used to draw up the 2021 schedule
- Develop digital assets/templates and advice for **social media** including **Instagram**

Enable, Inspire, Motivate

- Information and advice on how to **promote your Good Cause through your lottery**, including support on **objection handling**.
- As the national offer cannot cater to **local businesses**, Operators will have the ability to run additional **local prize draws** for the Lottery Anniversary (Raffles)
- The responses to the survey are also being shared with the **Lottery Operator** to help drive progress on **their own marketing/PR initiatives**

