

Sport MR's Spotlight on Cricket – Current State and Future Prospects

As the dust settles on the England v South Africa Test Series which got Joe Root's captaincy of the national side off to a flying start, and as we prepare for the visit of the rapidly improving West Indies side, it is interesting to look at the numbers of people following cricket in the UK, the forms of cricket that they are following and at the profile of the game's followers.

As ever, our primary information source here is Sport MR's Spotlight, the bi-weekly study of a nationally representative sample of 2,000 UK citizens, which we have run over a 12-month period together with our partner Populus Data Solutions. A summary of the findings of each fortnightly study is available on our website: <http://www.sportmr.co.uk>.

Following of cricket

Cricket interests a quarter of the UK population. It is one of seven sports separated by only a few percentage points in the contest for Britain's most followed sport behind tennis, athletics and our national obsession – football.

Sport	Following
Football	44%
Athletics	38%
Tennis	35%
Motor Sport	27%
Gymnastics	26%
Rugby Union	25%
Swimming	25%
Snooker	24%
Cricket	23%
Cycling	23%

A look at those expressing strong interest shows the extent of football's lead with a third of the population *very* interested in following it. Against this measure, cricket is one of several sports clustered around the 10% mark, vying for second place in the nation's affections alongside tennis, athletics, motor sport and rugby union. On the face of it cricket has over 5 million adult followers in the UK who are very interested in the sport. Therefore, and to paraphrase Mark Twain, "reports of the death of cricket have been greatly exaggerated". Let's dig a bit deeper.

Who follows cricket?



Men outnumber women four to one among cricket fans. Though higher interest among men than women applies for each of the main sports followed in the UK, 80% male following for cricket is only matched by golf (79%) and contrasts with 70% for motorsport, rugby union and football, 60% for cycling and athletics and 57% following tennis. So, cricket has a very strong male skew in its follower base.

The following of cricket is higher amongst people in socio-economic grouping AB and lower among the young. These facts are mirrored for many sports, though the degree to which this is true in respect of age is more marked and, therefore, of greater concern for cricket than for other sports.

Who	UK Population	Cricket Fans
Gender		
Men	49%	80%
Women	51%	20%
Age		
16-24	12%	6%
25-34	17%	14%
35-44	16%	15%
45-54	18%	18%
55-64	14%	18%
65 +	22%	28%
Social Class		
AB	27%	35%
C1	27%	26%
C2	22%	20%
DE	24%	20%

Following for the Different Forms of Cricket



Our Spotlight clearly shows that following for Test matches involving England playing at home still significantly exceeds the following of any other form of cricket among UK fans. The pace and format of Test matches may not be the most effective means of bringing new followers to cricket, but it remains hugely popular with existing fans, as further evidenced by ticket sales for the recent South Africa series.

The table below shows the highest following we recorded for each of the main forms of cricket at home and abroad over the last year.

Competition 2016/17	Following
England v Pakistan Test in England	22%
India v England Test in India	15%
West Indies v England ODI in Barbados	11%
T20 Big Blast in England	11%
England v Ireland ODI in England & England v South Africa ODI in England	10%
Royal London One Day Cup	9%
T20 Big Bash in Australia	8%
Specsavers County Championship	6%
Indian Premier League	5%

To summarise, among cricket followers in the UK:

- Almost all will follow England Test Matches at home
- Three quarters will follow England Test Matches away
- Half will follow the T20 Big Blast
- A little under half will follow England's ODI's home or abroad
- A quarter will follow the County Championship

If the message here is that Test cricket isn't broken and shouldn't be fixed, it is worth considering what the other figures tell us.

They perhaps indicate that the growth of T20 doesn't threaten Test cricket, but may ultimately prove to be a more popular form of shorter international cricket matches than the ODI's and a more popular form of non-international cricket than the County Championship.

Only 21% of the Specsavers County Championship fanbase is aged under 44. What this proves is that the County Championship is not appealing to a large section of cricket's existing and potential fanbase. Time will tell whether the changes to the County Championship structure introduced by the ECB this year (fewer teams playing fewer matches with less fixture saturation) will help to address this. What is clear, however, is that change is needed.

Age	Test Match in England	Specsavers CC	T20 Big Blast	IPL
16-24	6%	4%	6%	12%
25-34	11%	10%	14%	15%
35-44	13%	7%	13%	14%
45-54	19%	21%	16%	17%
55-64	20%	21%	19%	18%
65+	32%	38%	32%	23%

Read: 6% of Test Match followers and 12% of IPL followers in the UK are aged 16-24,

It is encouraging to note that the T20 Blast has some cut through amongst the 25-34 age group, though it is still heavily skewed towards the over 65s.

In contrast, the younger cricket fan is better represented among the small following of the IPL in the UK which may suggest that the new 8 team T20 competition, positioned in the style of the IPL, could appeal to the younger cricket fan. As yet, the unanswered questions are:

- whether this competition will gain traction and improve following compared to the current 18 team format;
- will it ultimately lead to greater interest among the young in other forms of cricket?
- will the new format alienate the traditional fan?

It is well documented that cricket's move to pay TV cut off a section of its traditional fanbase after the hugely successful 2005 Ashes series. TV audiences have been in decline since that point. Follower numbers decline has been less noticeable, supported by a changing ethnic profile within the UK. The growing proportion of the population with origins in the Indian subcontinent, and their love of cricket, has helped maintain the sport's popularity, but masks a decline amongst the white UK population. The 8 new T20 teams based in cities will, if positioned correctly, appeal to a wider more urban cricket audience but a very different one to past cricket audiences. A key part of that positioning is the opportunity to view. Availability on platforms which make cricket easy to access could be an important part of the mix.

If the ECB can cultivate a new cricket fan from this competition, then that is good for cricket. But at what expense? What are the prospects for the game in those areas with no nearby T20 team? How far and where are existing cricket fans prepared to travel, to watch (and support) a city team? If the development of the professional Welsh regional rugby teams is anything to go by, then it suggests that the city based T20 teams should be a clear break from the existing structure and not formed as an amalgamation of the county teams. To appeal to a new audience, a city based team (as was the case with the IPL or Big Bash) can be launched with a new entertainment focused offer, which will appeal to live sports fans who don't watch cricket as well as those who do. In turn that can generate a better fan experience, larger following and revenue, bigger clubs and more interest in playing cricket amongst the young.

Anthony Everard, responsible for the Big Bash League (BBL) at Cricket Australia has stated that *"the success of the BBL can be attributed to a vision which was very clear. How does cricket attract new and diverse fans and a younger audience?"* With this broader audience in mind, the event day experience was reevaluated as was the choice of team names and colours and there was a move away from state based teams. The BBL offers a valuable case study which the ECB can adapt to the UK market in this new era for T20.

The Future of Cricket Participation



The ECB has acknowledged a marked fall in the numbers of people playing cricket which is an issue for the game in many respects (not least in obtaining Sport England funding). Ultimately, it is difficult to see that a continued drop in numbers of people playing cricket can do anything other than adversely affect the numbers of people following the sport. For this reason, initiatives to get people playing the game, particularly those aimed at children, should be warmly welcomed.

Congratulations are due to the ECB on the success of its Get into Cricket initiative, the results of which have exceeded initial expectations.

The Chance to Shine charity which has the objective of spreading the power of cricket and promoting key Spirit of Cricket messages to school children across England and Wales is also deserving of high praise.



What both these initiatives also do is seek to encourage female as well as male participation, thereby hopefully impacting positively on the numbers of women and girls following the sport and addressing the anomaly of our women cricketers enjoying huge international success without, so far, attracting a huge pool of potential successors. This Bedfordshire Cricket initiative is one of many seeking to address this.



Summary

Cricket, like many sports, is asking questions about how it can grow its fanbase and improve levels of participation. The key challenge is appealing to the younger fan without alienating the traditional follower or its grass roots heritage. Unlike other sports, cricket has established formats which enable it to offer different experiences to a consumer demanding more choice.

We have changing dynamics amongst followers, with a growing audience in urban centres and a decline in the rural heartland. Work needs to continue to stem the rural decline while taking advantage of the opportunity in cities.

The upcoming day night test is a good experiment. We are aware that the quality of the opposition and popularity of the format are key drivers of attendance, but so far 70,000 tickets have been sold at Edgbaston for the first three days. It will be interesting to see if the TV audience numbers benefit from more of the match taking place outside of the working week.

Interest in the men's Test side is high and, with a young, attacking side enjoying good results and an Ashes series looming, this does not look vulnerable at least in the short term. To capitalise on the equity of this marquee event, giving people access to view the Ashes is a big opportunity which must be taken. Free to air coverage would significantly boost audiences (the 2005 series was watched by 8 million people on Channel 4). This could be followed by free to air coverage of the inaugural new T20 competition giving the ECB two chances to make a mark in the coming year.

Women's cricket received a massive boost with the success of the England team in the World Cup, which saw viewing figures triple compared to the previous tournament. It appears that the ICC's decision to televise or stream all matches has been vindicated with a global audience of 180 million. The latent demand to view the sport is strong and therefore availability is a key factor in securing existing fans and attracting new ones.

The game is adapting as it clearly needs to and reaching out to women and to the young as it must if its future is to be as healthy as its past. The availability of different formats and the ability to showcase key events on a range of different media platforms is a move in the right direction.