New research by O&O suggests there is little consumer demand for the proposed city-based T20 competition even among younger and currently more casual fans of cricket.

Test matches remain the favourite format of the game for fans in the UK (and are still equally attractive as T20 to cricket fans aged 18 to 25)

Reform to the current Test match calendar in to a 2 division structure - where England would play only the top sides but more regularly – is a more popular innovation than an extra T20 competition.

Meanwhile reforms to the county game – moves to a 3-day county championship format with more bonus points – and the introduction of top international players to the current county T20 competition - could help the appeal of cricket below international level more than an additional T20 competition.

The ECB’s enthusiasm for an extra T20 competition may have more to do with the fact that this would sit outside the current Sky TV contract running to 2019, and might make up for the estimated £60m the ECB lost out on when it did its last TV deal, (back in 2011 just before BT entered the market). The deal also allowed Sky to extend for an extra 2 years from 2017 to 2019 with reportedly only a small uplift in annual fee.

**Cricket is still the UK’s third most popular sport enjoying relatively high levels of annual attendance and attracting sponsors chasing its largely middle class audience**

England are challenging again for the number one spot in Test cricket, but new research from O&O has found that there are longer term issues at the heart of the domestic game not being addressed by the ECB.

Cricket’s core fan base is the third biggest in the UK only bettered by football and F1. Domestic test match attendances total over half a million every summer, there are over 180k active participants in England and there is healthy sponsorship revenue from brands eager to access its relatively large middle class following.

But, cricket has an ageing and stagnant fan base in the UK, and if it is to prosper over the next decade, it needs to widen its appeal to younger and currently more casual fans. In an attempt to address this, the ECB has unveiled a series of reforms centred on an additional city-based T20 competition. However, this is unlikely to have significant impact and may betray a lack of a proper understanding of how best to broaden the appeal of the sport in the UK. Over 80% of sports fans surveyed by O&O this summer showed no interest at all in a city-based T20 competition.
Test matches remain the favourite format of the game for all types of fans in the UK, and reforms to the test calendar are more popular than a new T20 competition.

Test cricket is still the most appealing format to UK cricket fans. Even the under 25s rate Test match cricket as important as T20. The ECB’s focus should therefore be on further developing and broadening the appeal of the test game, where English cricket is strongest, work with the ICC to introduce a 2 division test calendar and explore the potential for 4-day matches and imposing meaningful deterrent fines for slow over rates. Cricket’s less passionate ‘casual’ fan base is more interested in reforms to test matches than to T20, with around 40% interested in moving to 4-day test matches and a 2 tier test league system.

The city T20 idea is unlikely to bring in considerable new investment into the domestic game or compensate for an estimated £60m which the ECB lost out on for agreeing to add a 2-year rollover to its last Sky contract. Rather than trying to emulate the IPL with an extra domestic T20 competition, the ECB could achieve its aims by allowing (and funding) counties to draft in more star overseas players for the existing T20 Blast.
The ECB keenness for an extra T20 competition may have more to do with the fact that this would lay outside the current Sky TV contract running to 2019

The main impetus behind the new competition could be that it gives the ECB new broadcast rights to take to market. The ECB has been locked in a contract with Sky for all forms since 2012 and has not been able to capitalise on the buoyant UK rights market. The length of the current cricket deal, which included an option for Sky to extend by two years has stagnated media revenue growth whilst football, rugby, tennis and F1 rights have all escalated in the last five years. Had the ECB have gone to market just 12 months later, it could have secured an extra 25%-100% uplift on its previous deal (depending on the packaging of the rights and BT’s appetite to take on Sky).

The ECB might be better off pushing for reform of the international Test Match calendar with the ICC and reforming the county game

The addition of a new tournament seems to be an odd justification for a reform programme designed to address long term issues of reach and appeal. Only 5% of sports fans were “very interested” in a city-based T20 competition. With other sports developing new competitions and more ways to engage fans, competition for their loyalty is intensifying.

O&O research shows that fans are looking for more compelling and attacking cricket from existing formats, rather than the introduction of new competitions. A more exciting county league, with shorter matches and more bonus points to incentivise teams to win matches, has higher appeal than the proposed city franchise-based T20 competition.

There is significant upside to be unlocked in the upcoming media rights contract renewal but it’s the packaging and the approach to the market plus the structure and rules of existing competitions which is likely to be the key to unlocking potential increased value, rather than the introduction of a second T20 competition.
Oliver & Ohlbaum is one of Europe’s leading independent policy and strategy advisors to the sports, media and entertainment industry, where we have unrivalled knowledge and expertise.

Established in 1995 and based in London, O&O has been an advisor to over 200 different clients on many of the major developments in the UK, European and global television, radio, publishing, on-line and sports markets. From supporting BT in their move into sport, to helping Discovery with their purchase of Olympic rights, we have been at the heart of the deals that have transformed sport over the last two decades.

O&O has been tracking developments in the sports market as rights holders look to reinvent, reform and reposition to ensure they keep or better their place in the pecking order of popularity with fans.