



**WORLD CRICKET
COMMITTEE**

Understanding Consumer Engagement with Test Match Cricket

Multi-market Study

Prepared for: Marylebone Cricket Club
Research carried out by: TNS Sport

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Background and Methodology

Declining Test Match Attendance

Background

The MCC commissioned TNS Sport to conduct on-line surveys amongst cricket fans in India, New Zealand and South Africa, with the primary aim of understanding the reasons behind the decline in Test Match attendances in these countries.

The questionnaire covered the following areas:

- Engagement with Cricket
- Level of following Test Match Cricket and other forms of the game
- Favourite format of the game
- Methods of cricket consumption
- Engagement with Test Match Cricket
- Test Match attendance (at all/last 12 months)
- Intention to re-attend
- Reasons for non-attendance of Test Match cricket (at all/last 12 months)
- Impact of Twenty20
- Factors influencing decision to attend
- Impact on interest of Test World Championship



Declining Test Match Attendance

Methodology

- A total of 1,516 interviews were completed among cricket followers across the 3 markets of interest

Who did We Interview?

- India – 509 cricket fans
- New Zealand – 502 cricket fans
- South Africa – 505 cricket fans

How did We Interview?

- 10 minute Ad-hoc online survey – India, New Zealand and South Africa

Key Findings and Market Summaries

Key Findings

- Across the 3 markets within which the survey was conducted, **more than half** of all respondents are either **regular or dedicated** cricket followers.
- The strength of engagement in cricket is strongest amongst those for whom Test Cricket and International T20 are the favoured formats.
- Whilst Test cricket is the **favourite** format of only a minority of cricket followers in each market, engagement with the Test game remains strong.
- There is overwhelming interest in Test Match cricket, with just 2% of respondents claiming not to follow the Test Match game at all, there is however a low conversion rate in terms of establishing the Test Match game as their favourite format.



Implications

- There is a strong base of engaged cricket followers, for whom cricket is a passion.
- Those for whom Test Match cricket remains their primary interest are amongst the most attached to the game as a whole, whilst the fans of domestic T20 demonstrate a far more passive level of interaction with cricket.
- Despite the emergence of Twenty20, and the increased competition for the attention of cricket followers, Test Match Cricket retains it's following, with **the majority** of respondents indicating that they **are at least regular followers of the Test game**, if not dedicated followers. It is clear that a **lack of interest is not the driving factor behind declining attendances** at Test Matches.

Key Findings

- For cricket followers in all 3 markets, TV is by far the dominant medium for cricket consumption, with **89%** of all respondents **watching Live coverage on TV**.
- A leading factor cited by those who have never attended a Test Match in person, and those who have attended in the past, but not during the latest series, is the fact that **they prefer to watch matches on TV**.
- Whilst a high proportion of cricket fans have attended a Test Match in the past, **just 1 in 4 have re-attended** during the last series in their country.



Implications

- **Cricket on television**, particularly live coverage, is going a long way towards **satisfying the desire that exists to follow and watch cricket**, limiting the motivation for attendance.
- The quality of modern TV coverage, with the increasing use of technology for advanced analysis, are providing the cricket fan with an increasingly attractive option for the consumption of Test cricket from the comfort of their own homes.
- Strong claims of **intention to re-attend** in all markets (95%) indicate that the Test match experience is typically a positive one, suggesting that **it is not the product itself which is driving people away**.

Key Findings

- Across all three markets, there are 3 areas that consistently emerge as having an impact on the intention of cricket fans to attend a test match – **Preference for watching matches on TV**, The **cost** (and to a lesser degree availability) **of tickets**, and a **lack of time** to attend.



Implications

- The impacts of the **global recession** have affected all areas of their decision making with regard to their disposable income, resulting in trends towards the **cheaper access point offered by TV**, for **all sports**, not just cricket.
- **The issue of time** is something that ties together a couple of other issues – **Accessibility** (time of day that play starts) and the growth of the **shorter formats of the game**.
- There are clear signs that cricket followers, like the rest of the population, are facing an increasing range of **demands on their time**. Faced with these demands, the time of day that play starts, and the more condensed form of cricket offered by the **shorter formats are presenting a more convenient fix** of cricket action.

Key Findings

- **8 in 10 Indian cricket followers** in India would be **more interested** in Test Match cricket if the result of every match contributed to a **Test World Championship**.
- The **greatest boost** in interest in test match cricket would be **amongst cricket fans who have previously attended a test match**, but there would still be an uplift amongst those who have not attended.
- Outside of a Test World Championship increasing the interest in Test Matches, there are **two areas** which appear most likely to offer **opportunities for re-enticing and re-engaging** cricket fans – **Ticket Prices and Timings**



Implications

- The **appetite for the Test game appears to remain quite strong**. There is an opportunity to **re-engage and re-invigorate** the test match followers of old.
- Whilst in the background there remain a number of obstacles of varying severity – **cost, timings, accessibility** - the prospect of a Test World Championship, and the increased significance that this would attach to a number of matches, offers **an immediate way of raising the level of interest** in the Test Match game in these markets. The other factors may still prevent fans from fully re-engaging and attending, but the increased interest would act to **strengthen the position that Test Match Cricket holds in the consciousness of cricket fans**.
- Whilst there is little that can be done about changing the start time of play significantly, a possible idea worthy of further testing is the offering of **session by session pricing**. Whilst not filling the grounds from the start of play, it may entice fans for whom it is **easier to take half a day off**, and for whom the **lower level of investment** may be more appealing.

Market Summary

India

- **6 in 10** cricket fans in India are dedicated cricket followers (strongly engaged with the sport)
- Amongst those for whom Test Match cricket is the favourite format, **62% are dedicated cricket followers**
- **81%** of cricket fans in India are **at least regular followers of Test Match cricket**
- The favourite format of cricket in India is **International Twenty20 (58%)** – likely misattribution due to the international profile, and international stars of the IPL
- **Test Match cricket is the favourite format of the game for 7% of cricket followers** in India
- **49% of cricket fans have attended a Test Match previously**, with 41% of those also attending a Test Match during the last series in India
- Amongst those who have attended a Test Match previously, **almost 6 in 10 say that the time that play starts is important** in influencing their decision to attend, with **7 in 10 more likely to attend** if changes are made in this area
- Whilst **ticket prices are also a very important factor** in the decision to attend, 57% of those who have attended previously, with **73% more likely attend in future** if changes are made.
- **58% of cricket followers in India claim that Twenty20 has reduced their interest in Test Match cricket**, however, the interest in Twenty20 is likely to develop interest in other forms of the game.
- The idea of all Test Matches contributing towards a Test World Championship is **likely to increase interest in Test Match cricket**, even amongst those who hardly ever follow the Test Match game – 63%.

Market Summary

New Zealand

- **2 in 10** cricket fans in New Zealand are dedicated cricket followers (strongly engaged with the sport)
- Amongst those for whom Test Match cricket is the favourite format, **31% are dedicated cricket followers**
- **56%** of cricket fans in New Zealand are **at least regular followers of Test Match cricket**
- The favourite format of cricket in New Zealand is **One Day Internationals (61%)**
- **Test Match cricket is the favourite format of the game for 19% of cricket followers** in New Zealand
- **51% of cricket fans have attended a Test Match previously**, with 17% of those also attending a Test Match during the last series in New Zealand
- Amongst those who have attended a Test Match previously, **almost 4 in 10 say that the time that play starts is important** in influencing their decision to attend, with **6 in 10 more likely to attend** if changes are made in this area
- Whilst **ticket prices are also a very important factor** in the decision to attend, for 66% of those who have attended previously, with **68% more likely attend in future** if changes are made.
- **13% of cricket followers in New Zealand claim that Twenty20 has reduced their interest in Test Match cricket**, however, the interest in Twenty20 is likely to develop interest in other forms of the game.
- The idea of all Test Matches contributing towards a Test World Championship is **likely to increase interest in Test Match cricket**, even amongst those who hardly ever follow the Test Match game – 42%.

Market Summary

South Africa

- **3 in 10** cricket fans in South Africa are dedicated cricket followers (strongly engaged with the sport)
- Amongst those for whom Test Match cricket is the favourite format, **52% are dedicated cricket followers**
- **76%** of cricket fans in South Africa are **at least regular followers of Test Match cricket**
- The favourite format of cricket in South Africa is **One Day Internationals (51%)**
- **Test Match cricket is the favourite format of the game for 12% of cricket followers** in South Africa
- **57% of cricket fans have attended a Test Match previously**, with 22% of those also attending a Test Match during the last series in South Africa
- Amongst those who have attended a Test Match previously, **almost 5 in 10 say that the time that play starts is important** in influencing their decision to attend, with **7 in 10 more likely to attend** if changes are made in this area
- Whilst **ticket prices are also a very important factor** in the decision to attend, for 69% of those who have attended previously, with **77% more likely attend in future** if changes are made.
- **23% of cricket followers in South Africa claim that Twenty20 has reduced their interest in Test Match cricket**, however, the interest in Twenty20 is likely to develop interest in other forms of the game.
- The idea of all Test Matches contributing towards a Test World Championship is **likely to increase interest in Test Match cricket**, even amongst those who hardly ever follow the Test Match game – 54%.

Cricket Fan Profile

Cricket Fan Profile - Segments

TNS Sport used a series of statements in order to segment the cricket followers into groups based on their level of engagement with cricket.

Which of the following statements best describes you?

Dedicated

- *Cricket is my favourite sport and is the sport I actively follow most closely*

Regulars

- *Cricket is one of my preferred sports, but I actively follow other sports more closely*

Occasional

- *I like cricket, but I tend only to watch a couple of matches a season*

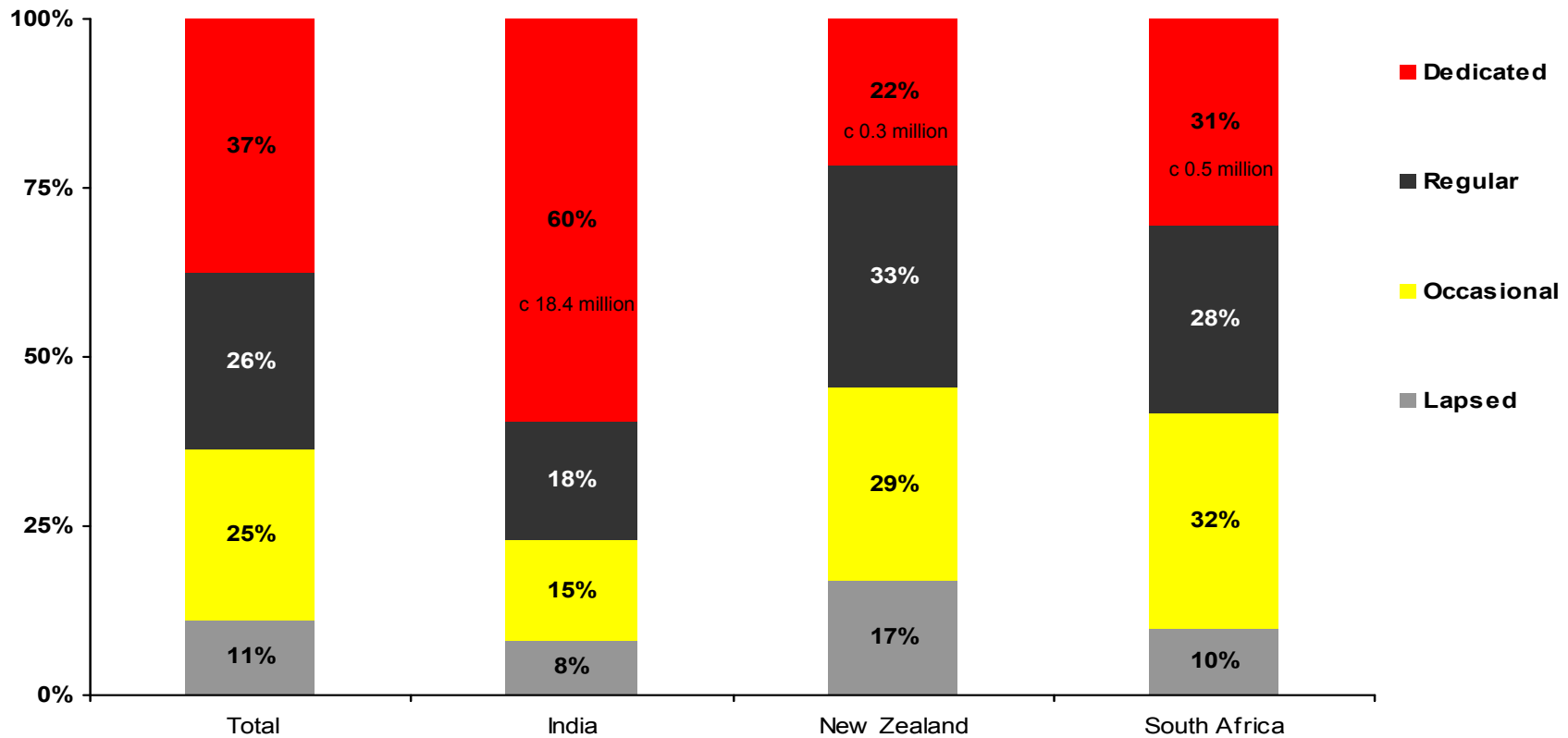
- *Cricket is one of my preferred sports but I watch less cricket now than in previous seasons*

Lapsed

- *I really only watch cricket because my friends and/or family follow the sport*

Cricket Fan Profile – All Cricket Followers

The strength of engagement with cricket as a whole is significantly stronger in India than the other 2 markets, though in all 3 markets, at least half of cricket fans are regular/dedicated followers of the game

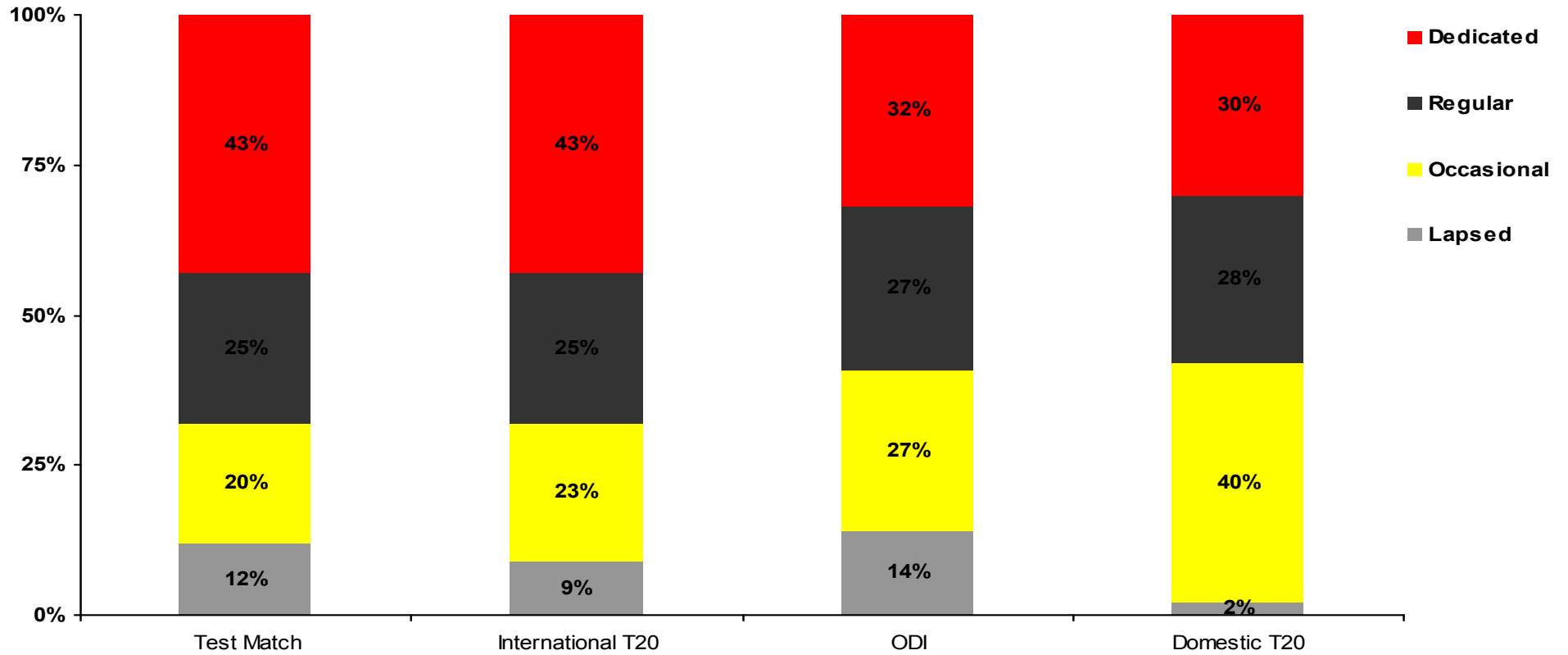


Base: c. 500 cricket followers per market
Q. Which of the following statements best describes you?



Cricket Fan Profile – by Favourite format of the game

Test Match followers are more likely to be dedicated cricket fans, whereas ODI and Domestic T20 fans are more occasional



Base: n. 1516 cricket followers

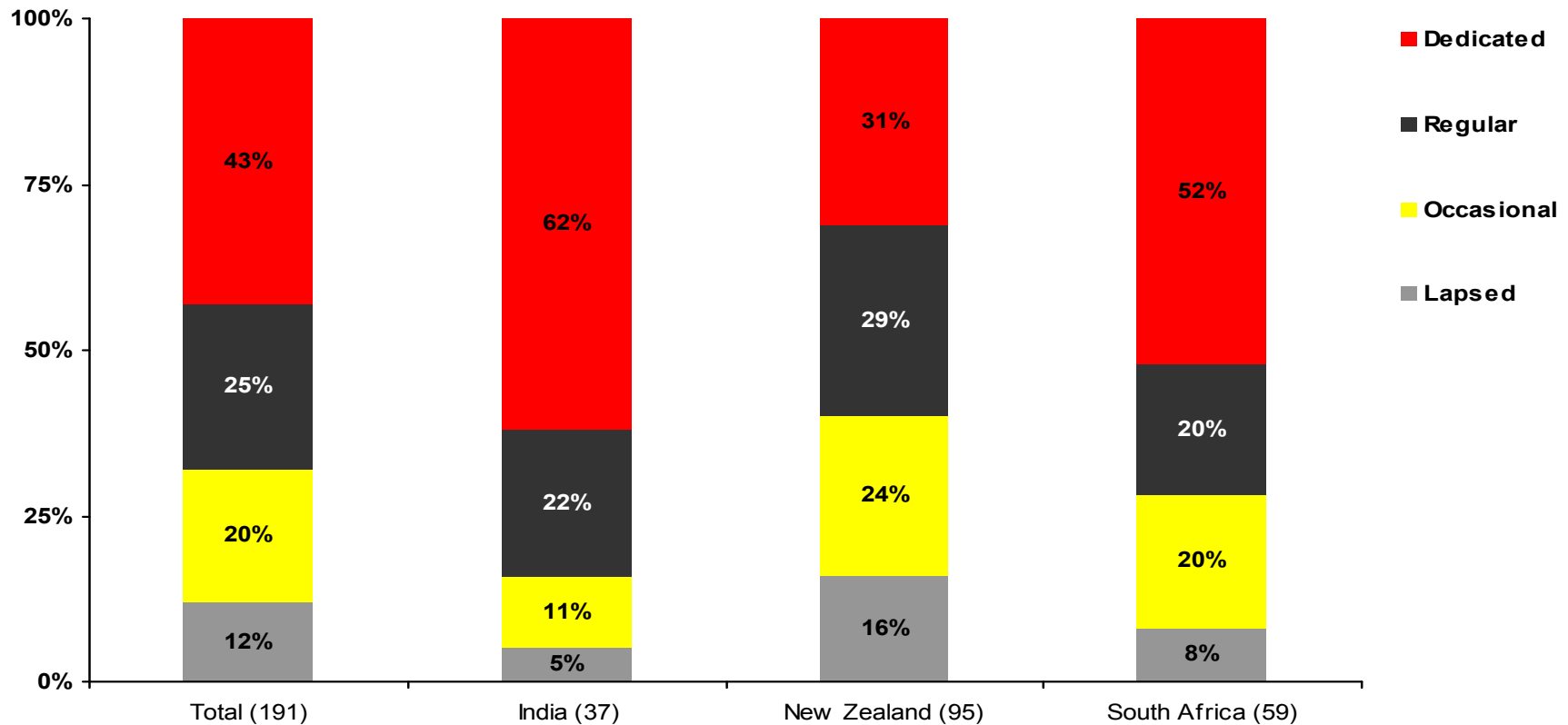
Q. Which of the following statements best describes you?

Q. Which is your favourite cricket format to follow?



Cricket Fan Profile – Amongst those who favour Test Match Cricket

Amongst those who favour Test Match cricket, there is a greater strength of engagement to cricket than is seen amongst cricket fans as a whole (37% of all cricket fans are dedicated, rising to 43% amongst Test Match fans)



Base: Cricket followers whose favourite format of the game is Test Match Cricket

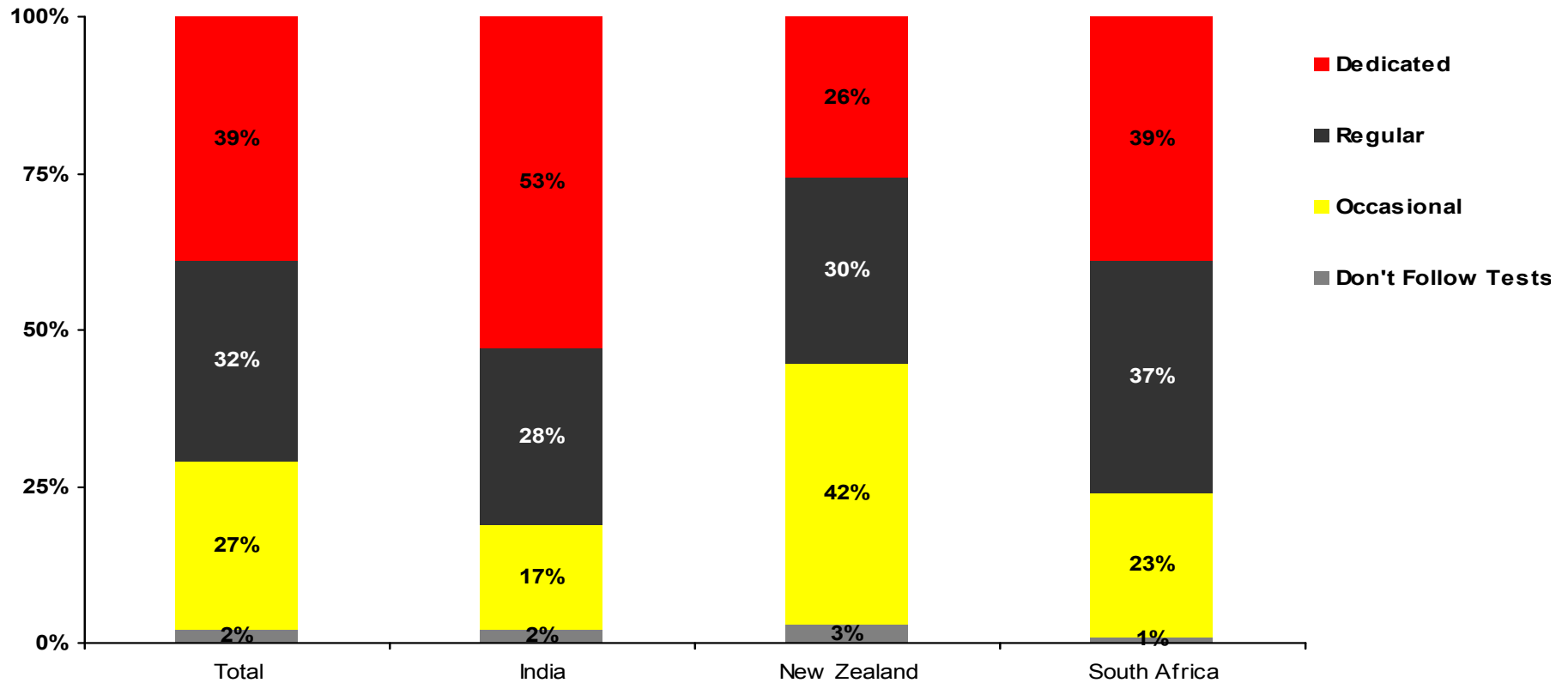
Q. Which of the following statements best describes you?

Q. What is your favourite cricket format to follow?



Test Match Fan Profile – by Market

Despite the fact that it is not the favourite format for the majority, there is still clearly an appetite for Test Match Cricket, with more than half of all cricket fans in India falling into the dedicated fan segment, whilst in New Zealand, although the strength of engagement is not as pronounced, more than half claim to be at least regular followers of the Test Match game.



Base: c. 500 cricket followers per market

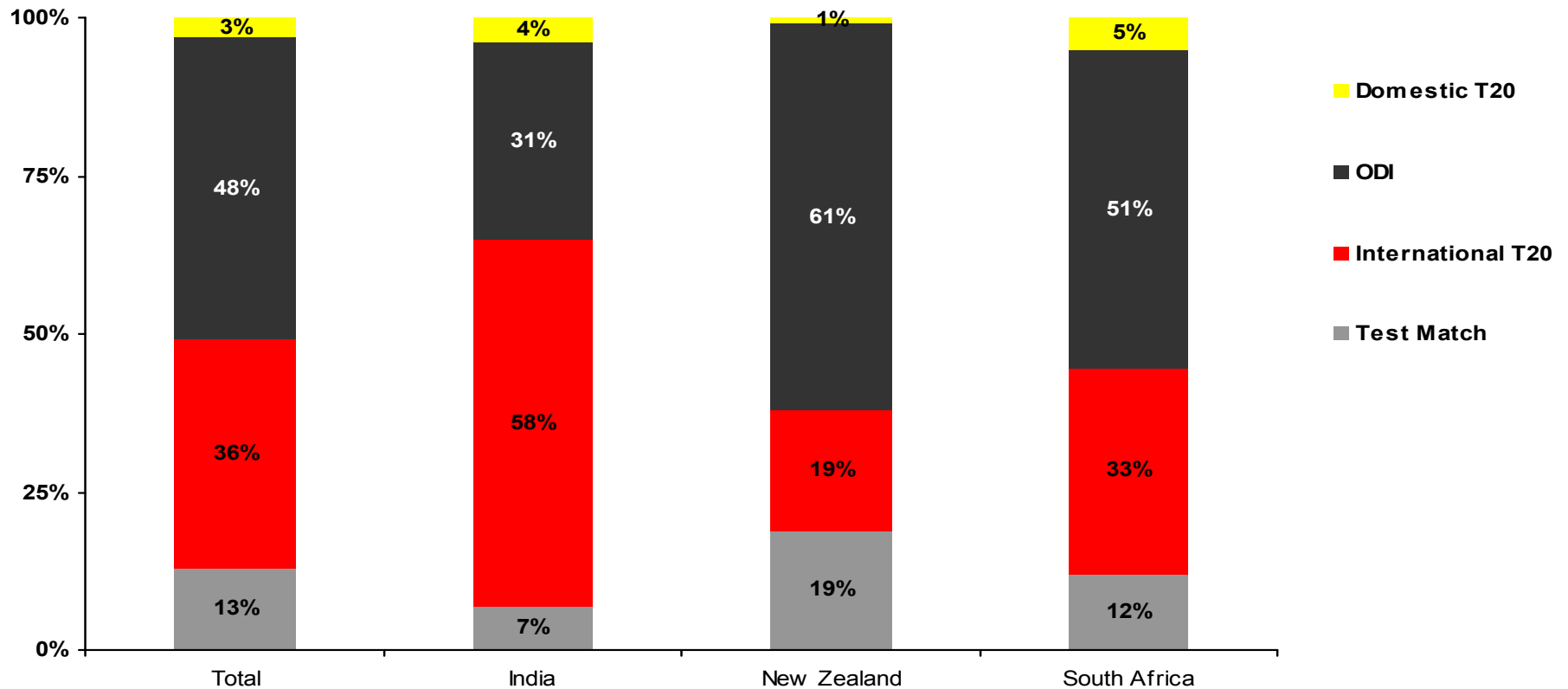
Q. Thinking about Test Match Cricket, which of the following statements best describes you?



Preferred Format of Cricket

Favourite Format of Cricket – All Cricket Followers

One Day Internationals are the preferred format in New Zealand and South Africa, whilst in India, International T20 is the favoured format. IPL's international profile provides access to an array of international figures, Indian cricket fans no longer need to go to Test Matches to get their fix of major stars such as Pietersen and Flintoff.



Base: c. 500 cricket followers per market
Q. Which is your favourite cricket format to follow?



Favourite Format of Cricket – Conversion

Conversion of those who are Test Match followers, into cricket fans who deem Test Match to be their favourite format is relatively low.

Conversion Index

■ % Test Match is Favourite Format

■ % Follow Test Match Cricket



Base: c. 500 cricket followers per market

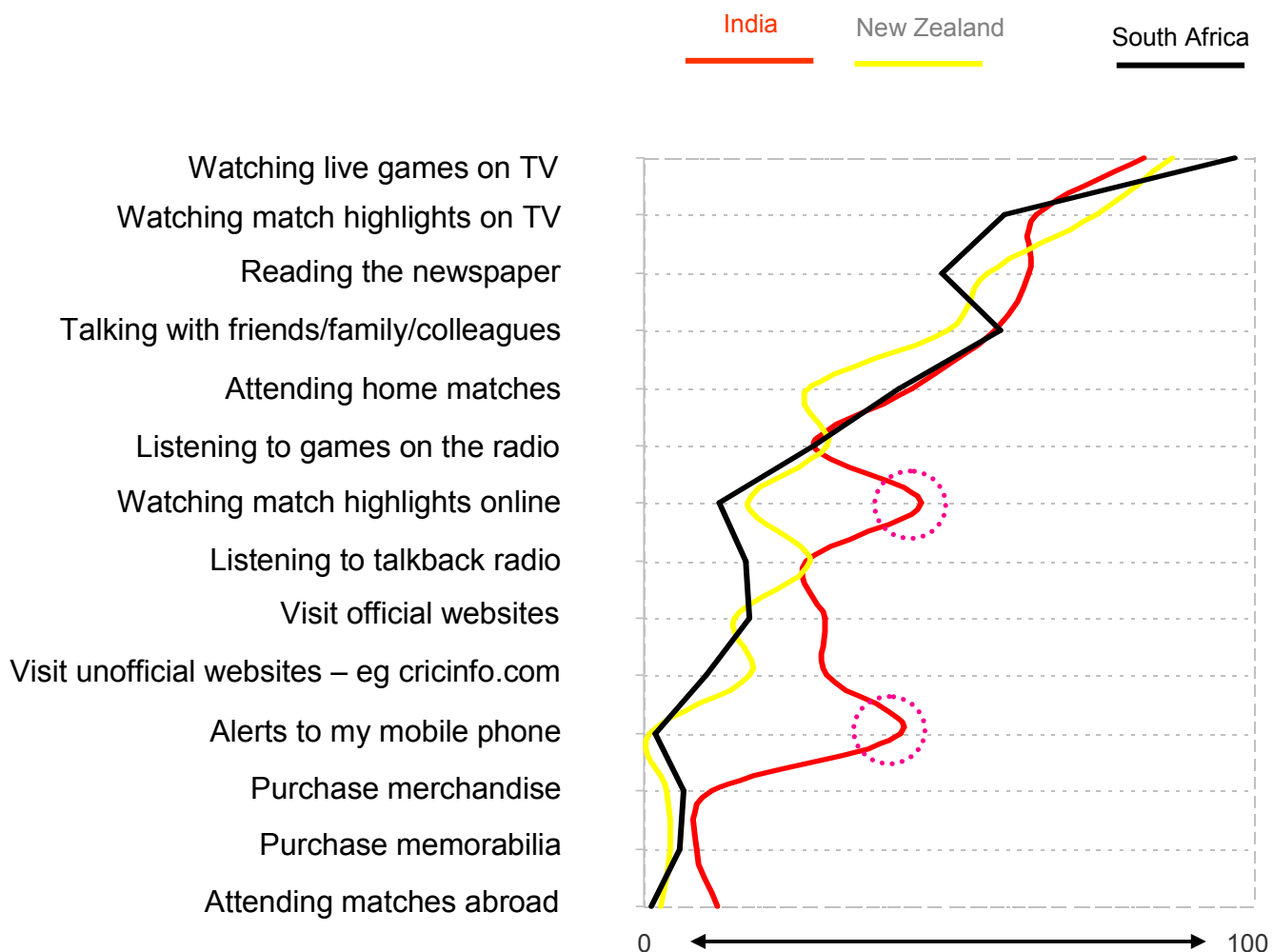
Q. Which is your favourite cricket format to follow?

Q. Thinking about Test Match cricket, which of the following statements best describes you?



Methods of Consumption

Ways of Following the game – All Cricket followers



Watching cricket on TV, either in the form of live match coverage or highlights, is the primary method of consumption across all 3 markets, with 89% of all respondents watching live games on TV.

Respondents in India demonstrate a greater use of the newer mediums, such as on-line highlights, websites (official and unofficial) and alerts to mobile phones.

The utilisation of mobile phone alerts and online highlights suggests a tendency for the Indian cricket fan to prefer to consume by way of more condensed coverage.



Base: c. 500 cricket followers per market
Q. In what ways do you follow cricket?



Ways of Following the Game – All Markets

For all forms of the game, the primary method of cricket consumption is live TV coverage, with Test cricket fans also indicating a propensity towards Newspapers and radio coverage as ways of following the game.

	Traditional Media				New Media			Other
	TV - Live	TV - HL	Newspapers	Radio	On-line HL	On-line updates	Mobile	Social
Total	89%	66%	57%	29%	26%	21%	16%	56%
Test Match	89%	68%	62%	46%	21%	28%	14%	64%
Int. T20	85%	65%	53%	26%	33%	25%	25%	55%
ODI's	91%	67%	57%	28%	21%	19%	10%	54%
Dom. T20	91%	64%	60%	19%	32%	26%	15%	68%



Base: c. 500 cricket followers per market
Q. In what ways do you follow cricket?

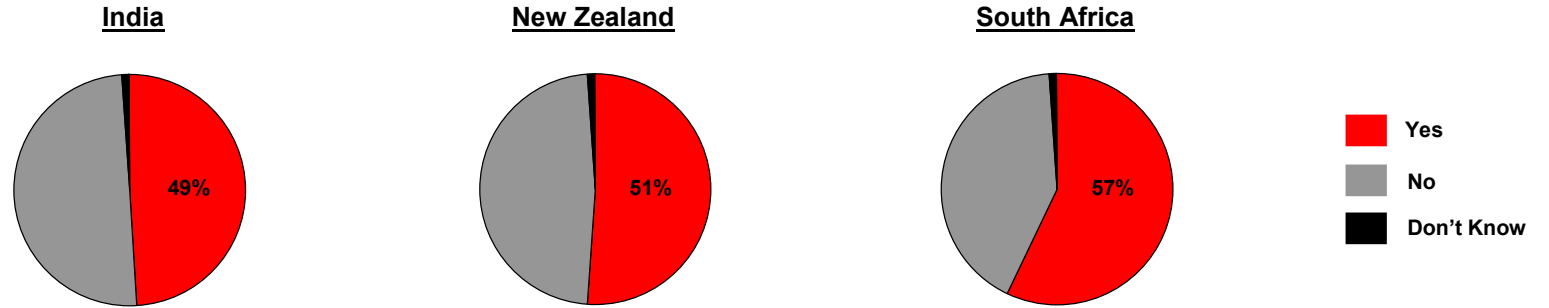


Test Match Attendance

Test Match Attendance

Almost half of respondents in India claim to have attended a Test Match previously, rising to 51% in New Zealand, and 57% in South Africa

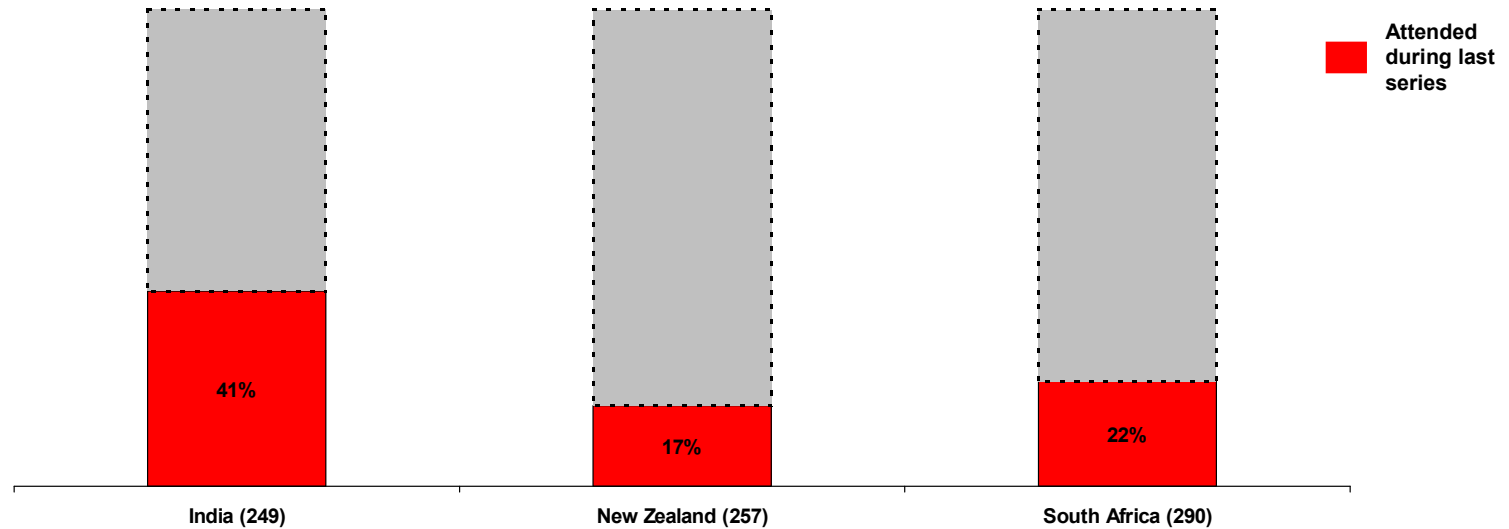
Q. Have you ever attended a Test Match?
Base: c. 500 cricket followers per market



Whilst a high proportion of cricket fans had attended a Test Match in the past, just 1 in 4 had attended again recently, dropping to less than 1 in 5 in New Zealand.

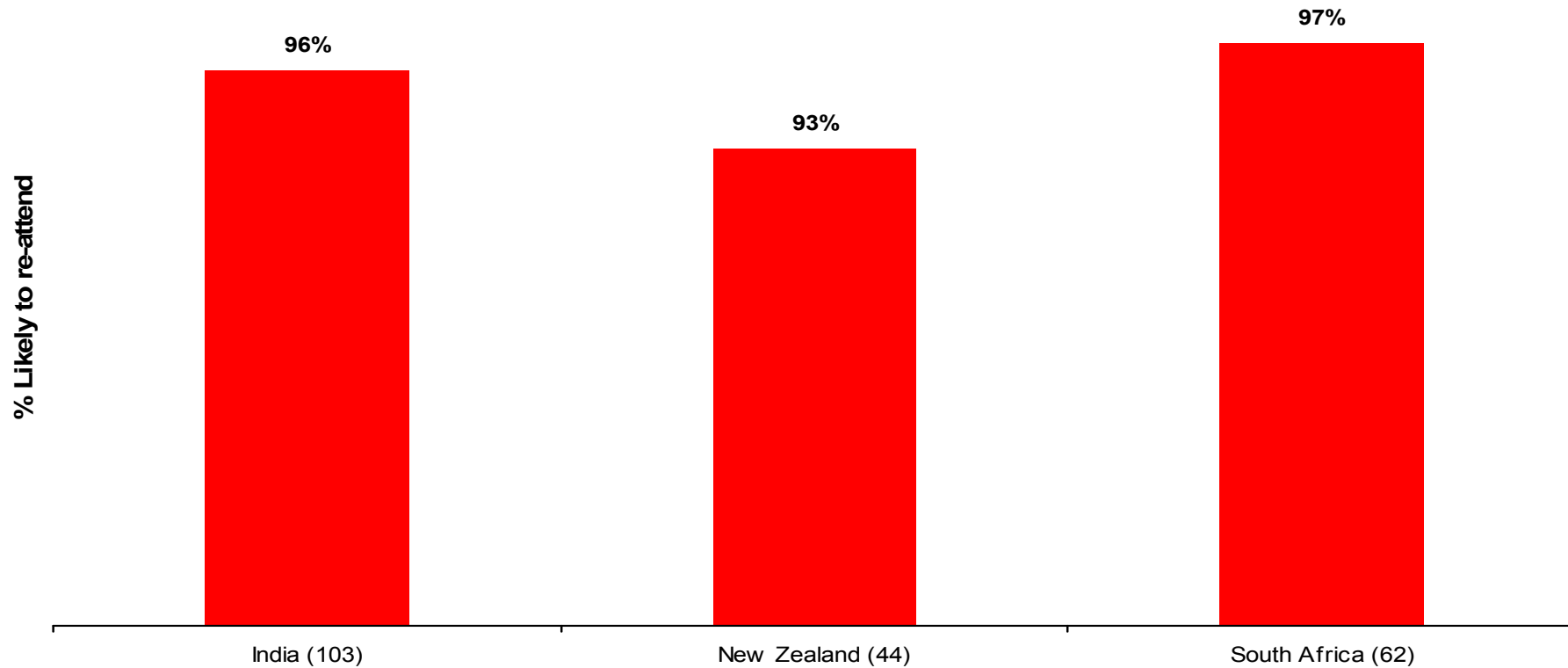
Re-attendance - % of those who have attended a Test Match

Q. During the last test match series played in your country, did you attend a Test Match?



Intention to Re-attend – All who attended a Test Match during the last series

Amongst those who have attended a Test Match recently, there is strong endorsement for the experience, with 95% across all 3 markets claiming that they are likely to re-attend, suggesting that it is not the product itself that is driving people away.



Base: Cricket followers who attended a Test Match during the last series

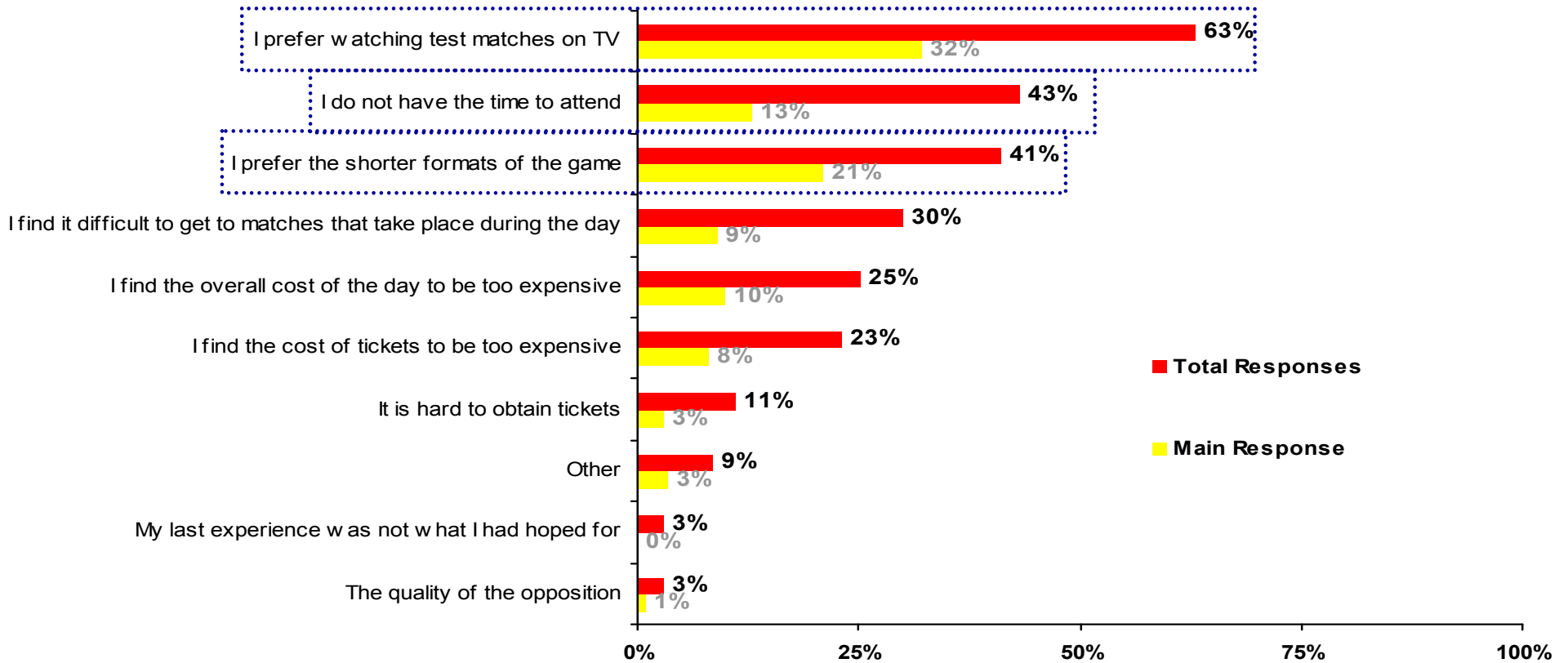
Q. Based upon your last experience, how likely are you to attend a Test Match again in the future?



Reasons for never attending a Test Match – All Markets

63% of respondents who have never attended a Test Match have identified a preference for watching matches on TV as a reason for not attending a Test Match in the past, with 1 in 3 citing it as the main reason.

Also featuring prominently amongst the reasons are a lack of time, and the increasing popularity of the shorter formats, which would seem to go hand in hand with each other.

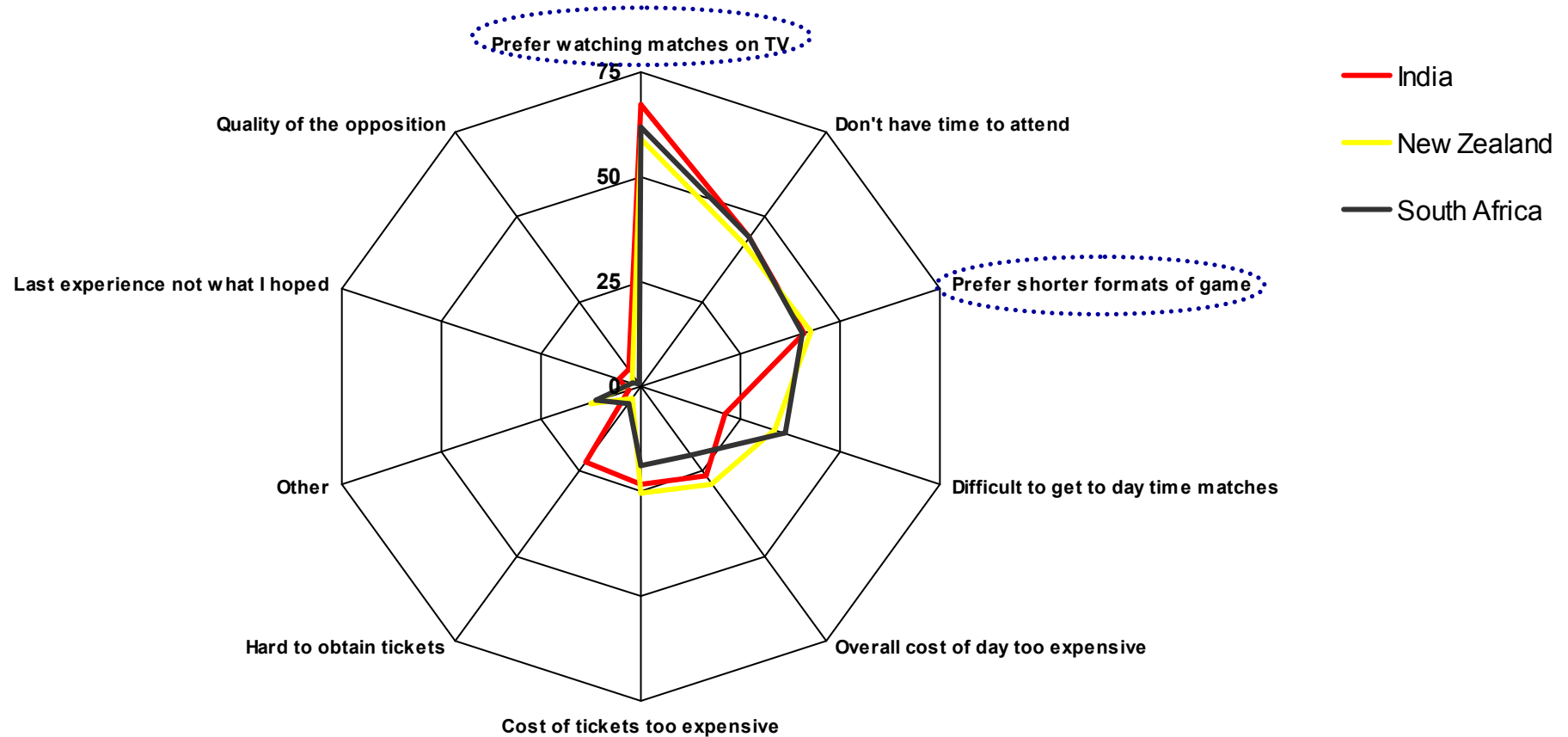


Base: c. 250 - 290 cricket followers who have never attended a Test Match per market
 Q. Which of the following statements best describes your main reason for not attending a test match?



All Reasons for never attending a Test Match

The stand out reason for cricket fans never having attended a Test Match, is that they claim to prefer watching Test Matches on TV. The increasing popularity of the shorter formats of the game is also a contributing factor

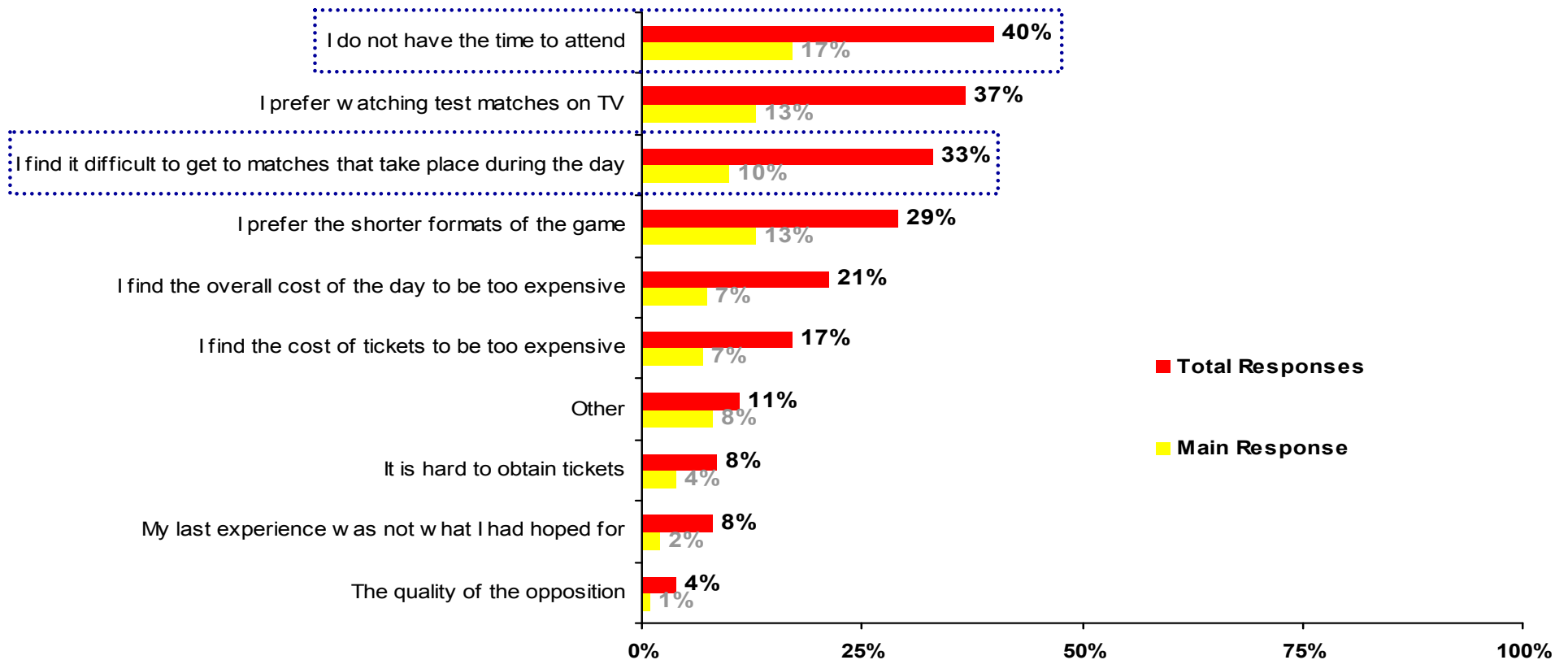


Base: c. 250 - 290 cricket followers who have never attended a Test Match per market
 Q. Which of the following statements best describes your main reason for not attending a test match?



Reasons for not attending a Test Match during the last series – All Markets

For those who have attended Test Matches previously, but not recently, the main reason given was that they did not have time to attend, with the difficulty of getting to day time matches also featuring quite prominently. In India there are a number of respondents who would like to attend, but find it hard to obtain tickets. Again the preference for watching on TV features strongly in all 3 markets.

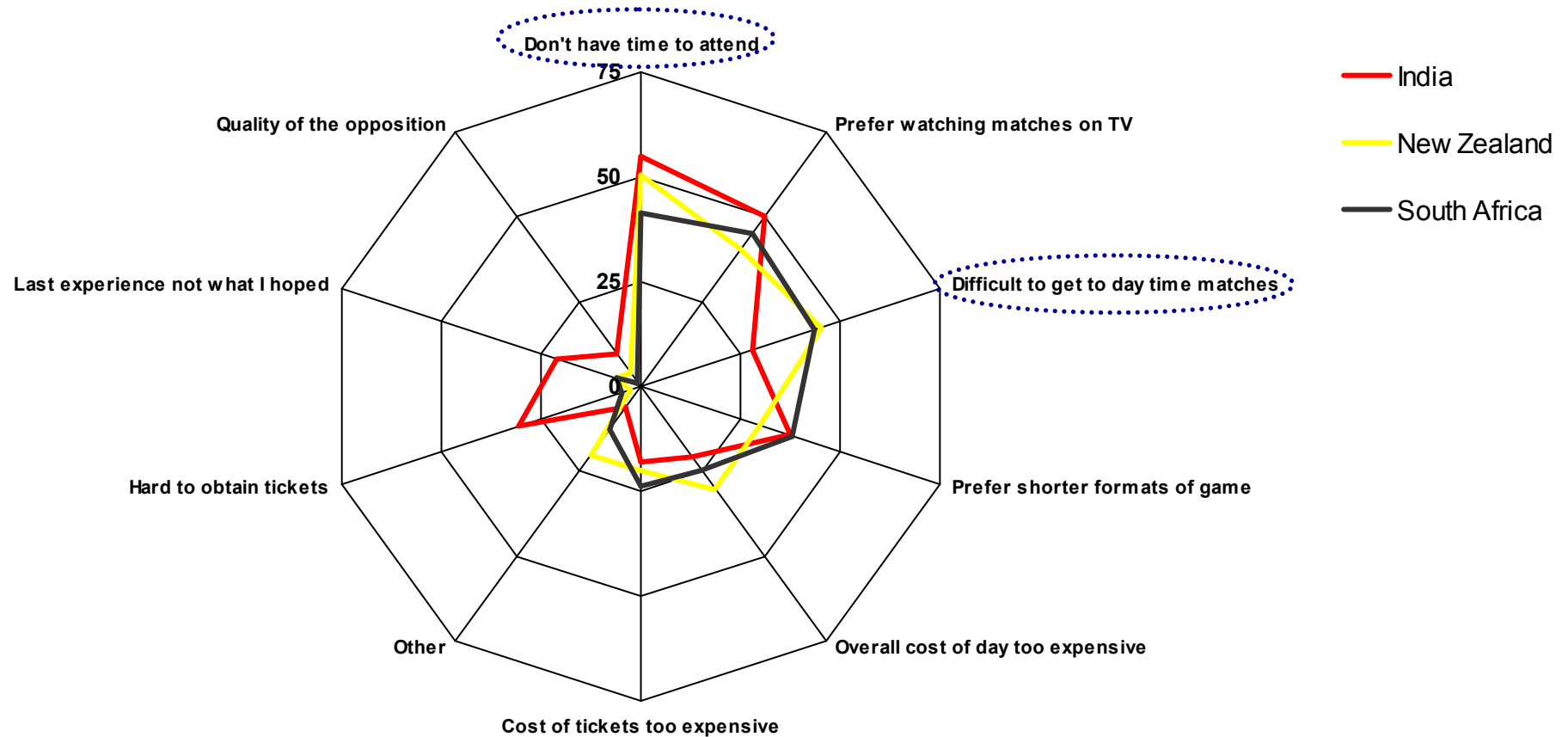


Base: c. 144 - 226 cricket followers who have attended a Test Match, but not during the last series per market

Q. Which of the following statements best describes your main reason for not attending a test match during the last series played in your country?



All Reasons for not attending a Test Match during the last series



Factors Influencing Decision to Attend

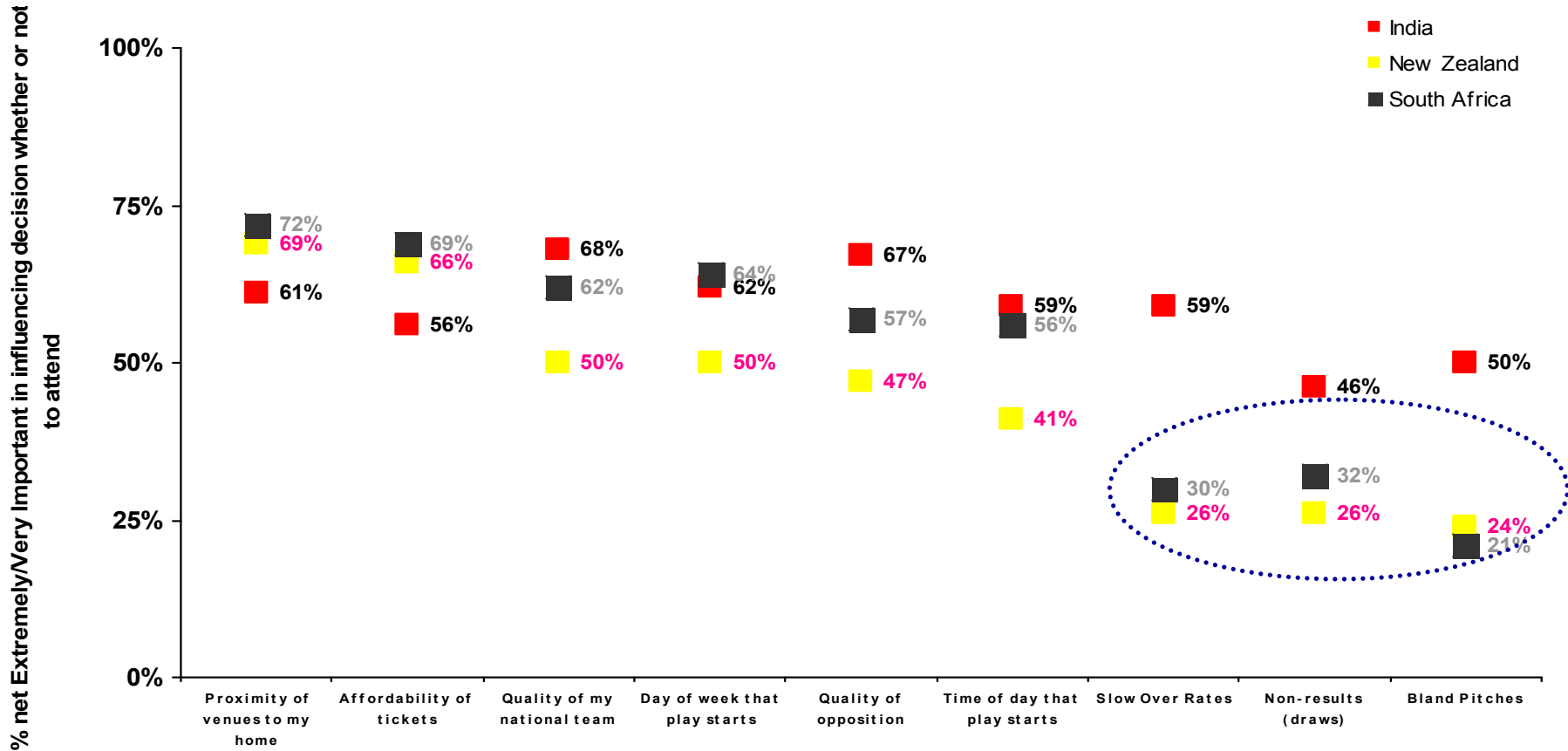
Factors influencing Attendance

Ticket prices and the time of day that play starts are deemed to be very/extremely important in influencing the decision to attend in all 3 markets, and changes to both factors would increase the likelihood of future attendance amongst cricket followers in each of the 3 countries.

		Attended		Never Attended	
		<u>Extremely/very important in influencing decision to attend</u>	<u>Likelihood to attend if changes are made to the following factor</u>	<u>Extremely/very important in influencing decision to attend</u>	<u>Likelihood to attend if changes are made to the following factor</u>
India	Ticket Prices	57%	73%	54%	65%
	Time of day that play starts	59%	69%	59%	69%
New Zealand	Ticket Prices	66%	68%	66%	55%
	Time of day that play starts	40%	55%	43%	49%
South Africa	Ticket Prices	69%	77%	69%	70%
	Time of day that play starts	49%	67%	66%	71%

Factors Influencing decision whether or not to Attend a Test Match

The least important elements across all markets, particularly New Zealand and South Africa, are the pitch and play based elements. The factors with the greatest influence are far more practical, with the proximity of the venue being the leading factor in New Zealand and South Africa, whilst in India the leading factors are the quality of the two teams involved. The affordability of tickets also has a significant influence in New Zealand and South Africa.



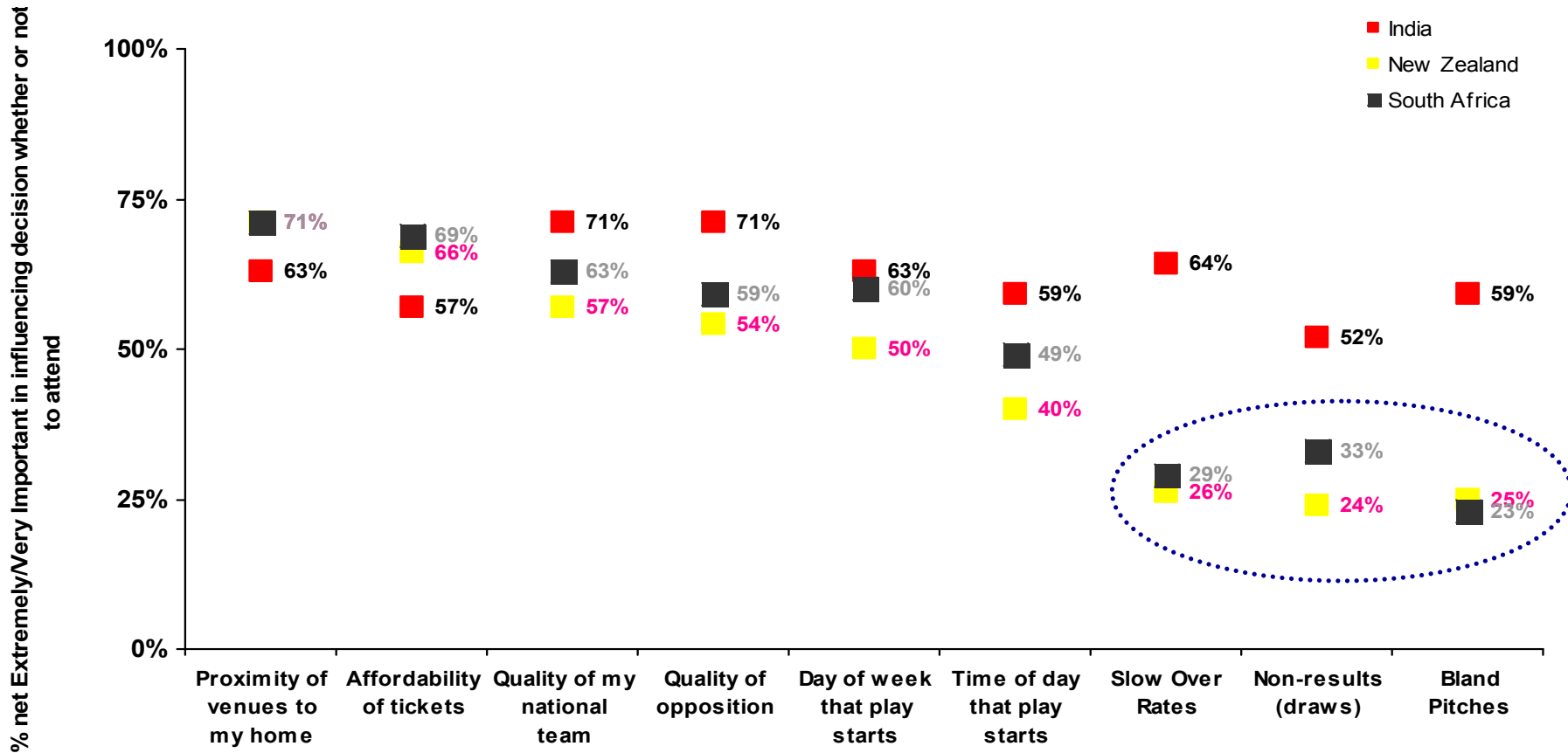
Base: c. 500 cricket followers per market

Q. Please indicate how important each of the following elements are in influencing your decision whether or not to attend a test match?



Factors Influencing decision whether or not to Attend a Test Match

Test Match Attendees



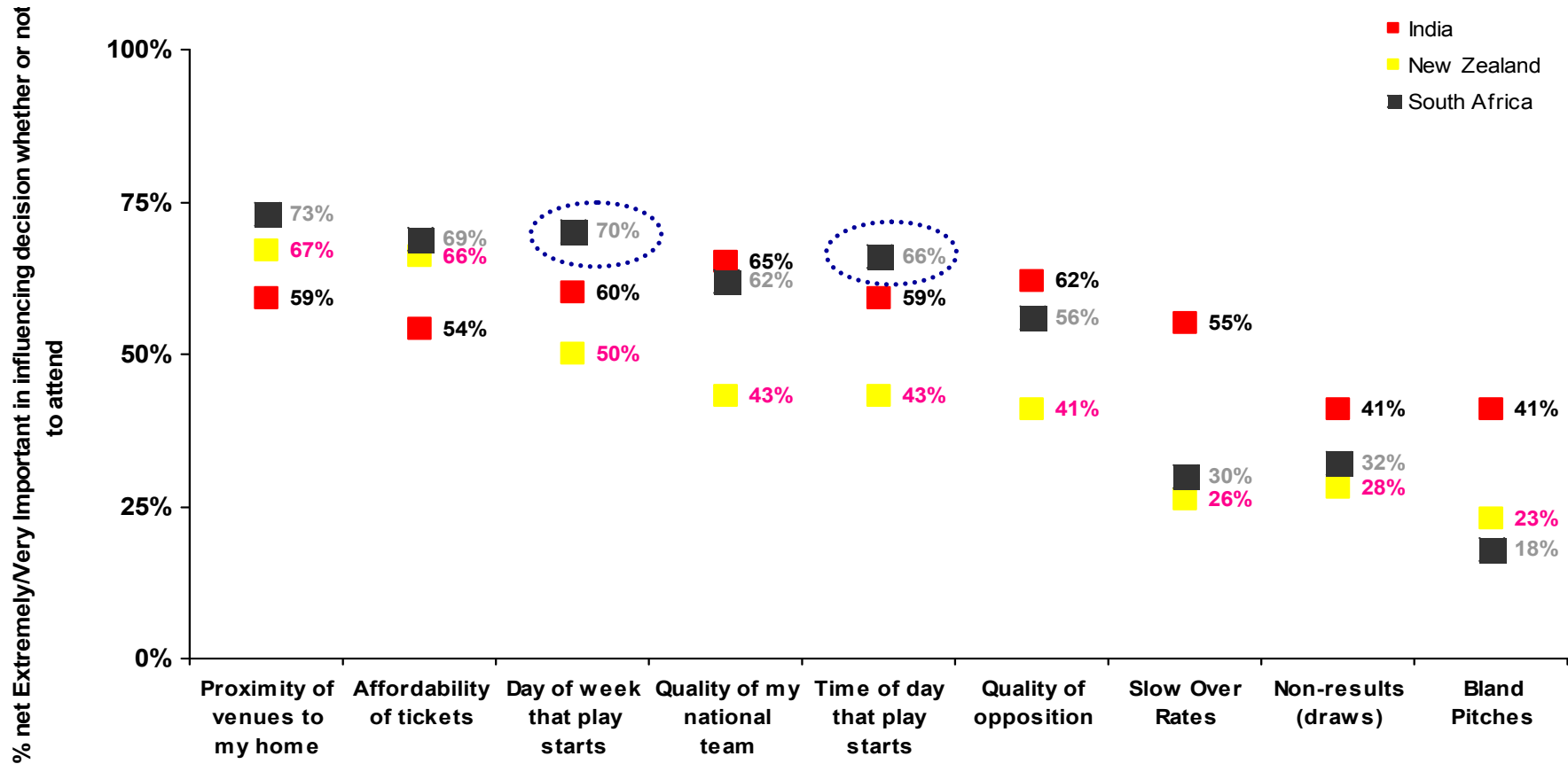
Base: c. 249 - 290 test attendees per market

Q. Please indicate how important each of the following elements are in influencing your decision whether or not to attend a test match?



Factors Influencing decision whether or not to Attend a Test Match

Non Test Match Attendees



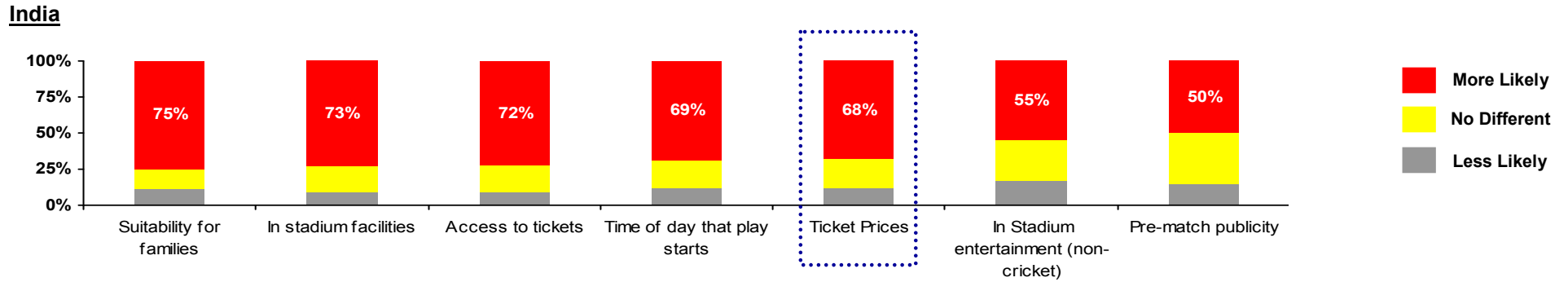
Base: c. 211 - 254 non test attendees per market

Q. Please indicate how important each of the following elements are in influencing your decision whether or not to attend a test match?

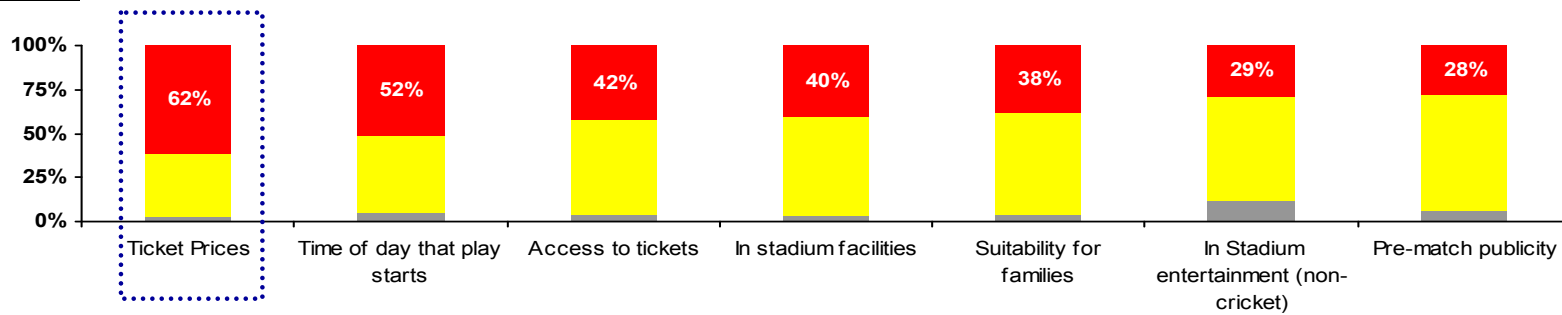


Changes that would increase likelihood of future attendance

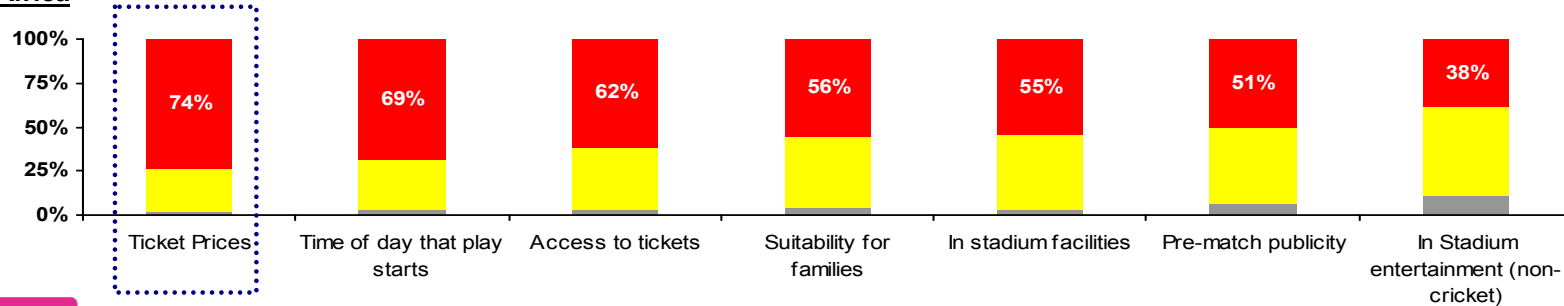
Respondents in India see changes in a number of areas as being important to increase their likelihood to attend a test match in the future. The cost of tickets is the primary area where change is wanted in New Zealand and South Africa, with the time of day that play starts also scoring strongly.



New Zealand



South Africa



Base: c. 500 cricket followers per market

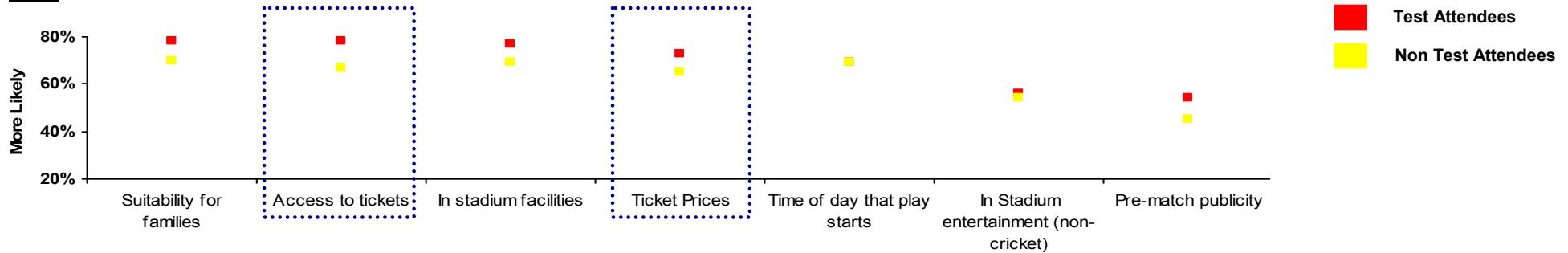
Q. How much more or less likely would you be to attend a test match in the future if changes were made to the following elements?



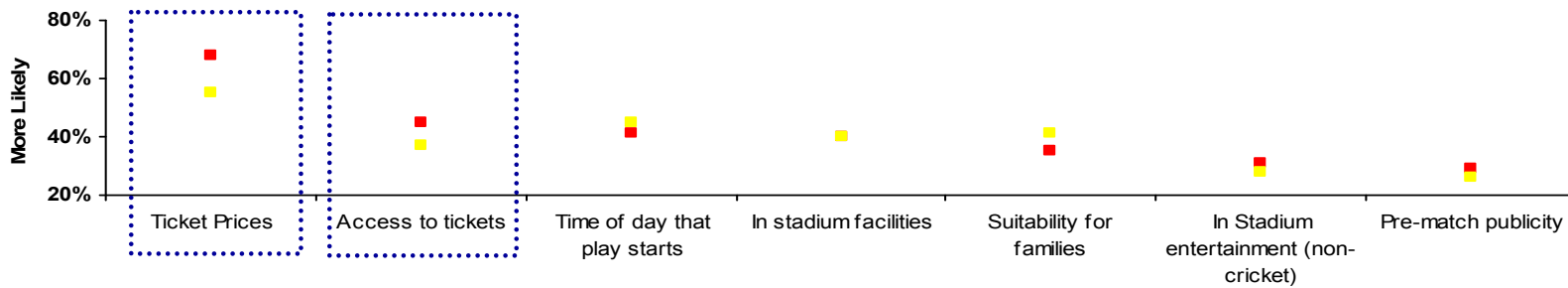
Changes that would increase likelihood of future attendance

Across all 3 markets, ticket prices and the actual access to tickets were more likely to increase future attendance amongst those who have previously attended Test Matches. The time of day that play starts is of greater importance to those who have never attended a Test Match.

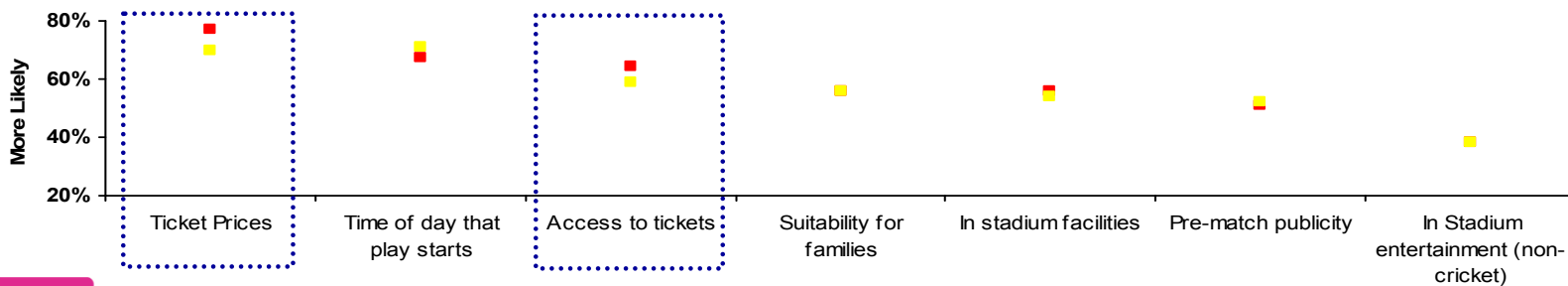
India



New Zealand



South Africa



Base: c. 500 cricket followers per market

Q. How much more or less likely would you be to attend a test match in the future if changes were made to the following elements?

Q. Have you ever attended a test match?



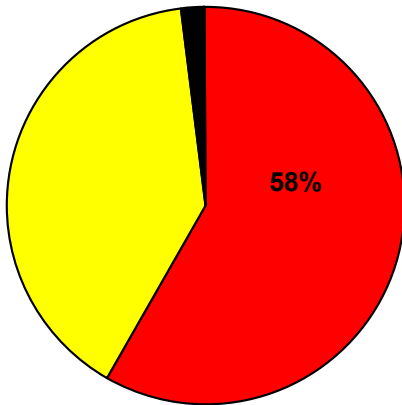
The Impact of Twenty20

Has the emergence of T20 reduced your interest in Test Match Cricket?

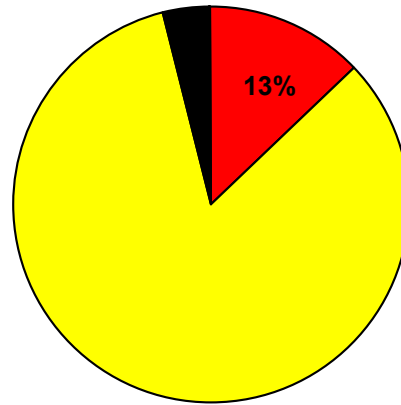
Interest in Test Match Cricket in India has been significantly impacted by the emergence of Twenty20 cricket, with almost 3 in 5 acknowledging the fact.

Twenty20 has had less of a dramatic effect in New Zealand and South Africa, but has still slightly eroded the Test Match fan base.

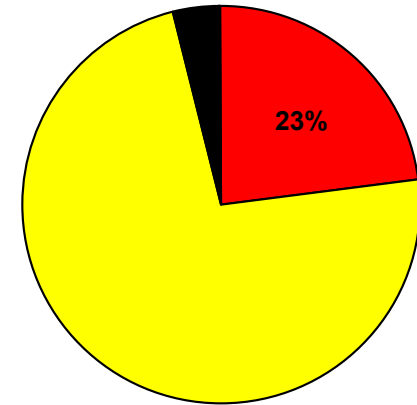
India



New Zealand

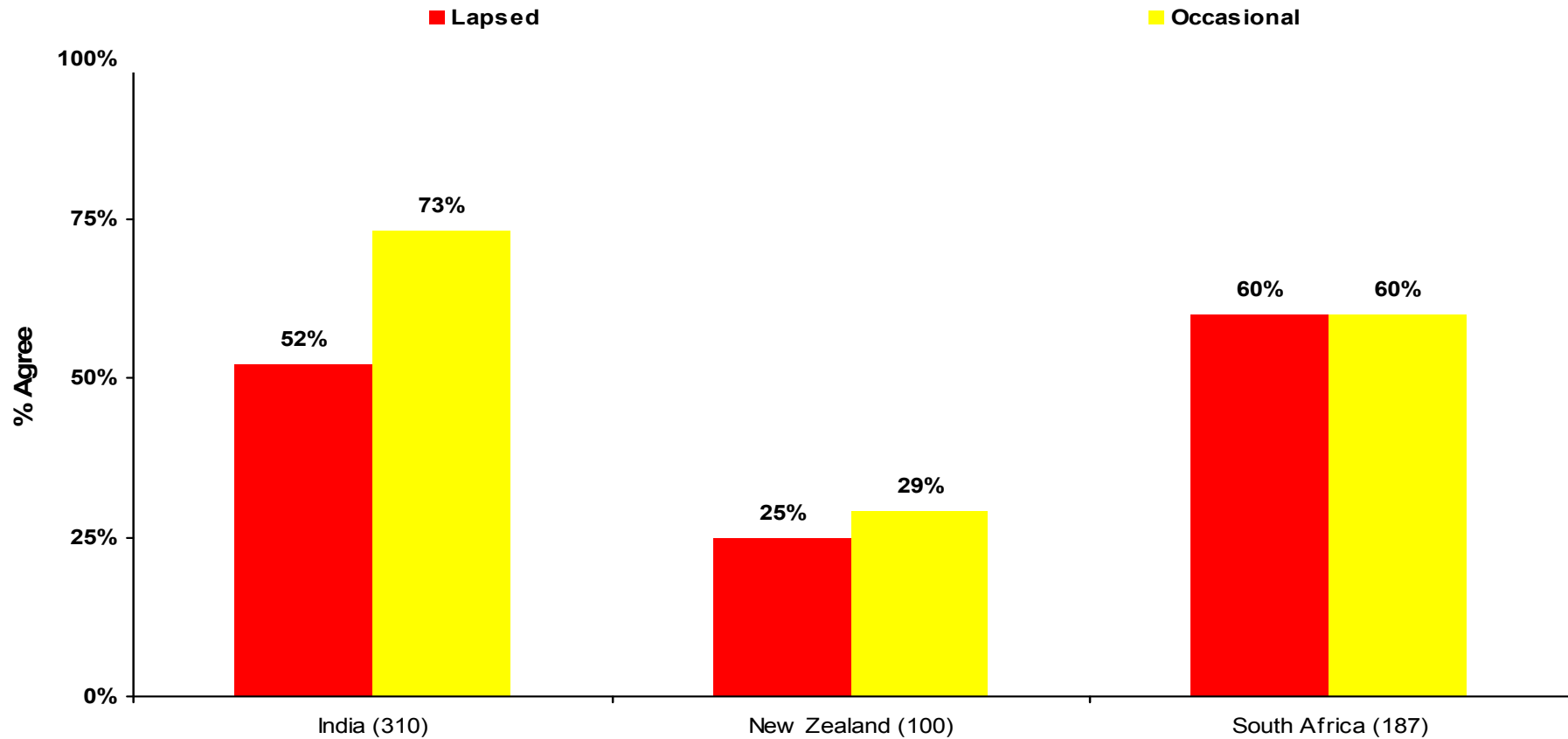


South Africa



Is interest in T20 likely to develop interest in other forms of the game?

Amongst the least engaged segments in India and South Africa, there is clear openness towards the prospect of T20 sparking an interest in the wider game of cricket outside the twenty over format, suggesting that there is an opportunity to exploit the buzz and interest around T20 to reinvigorate interest in the longer forms of the game



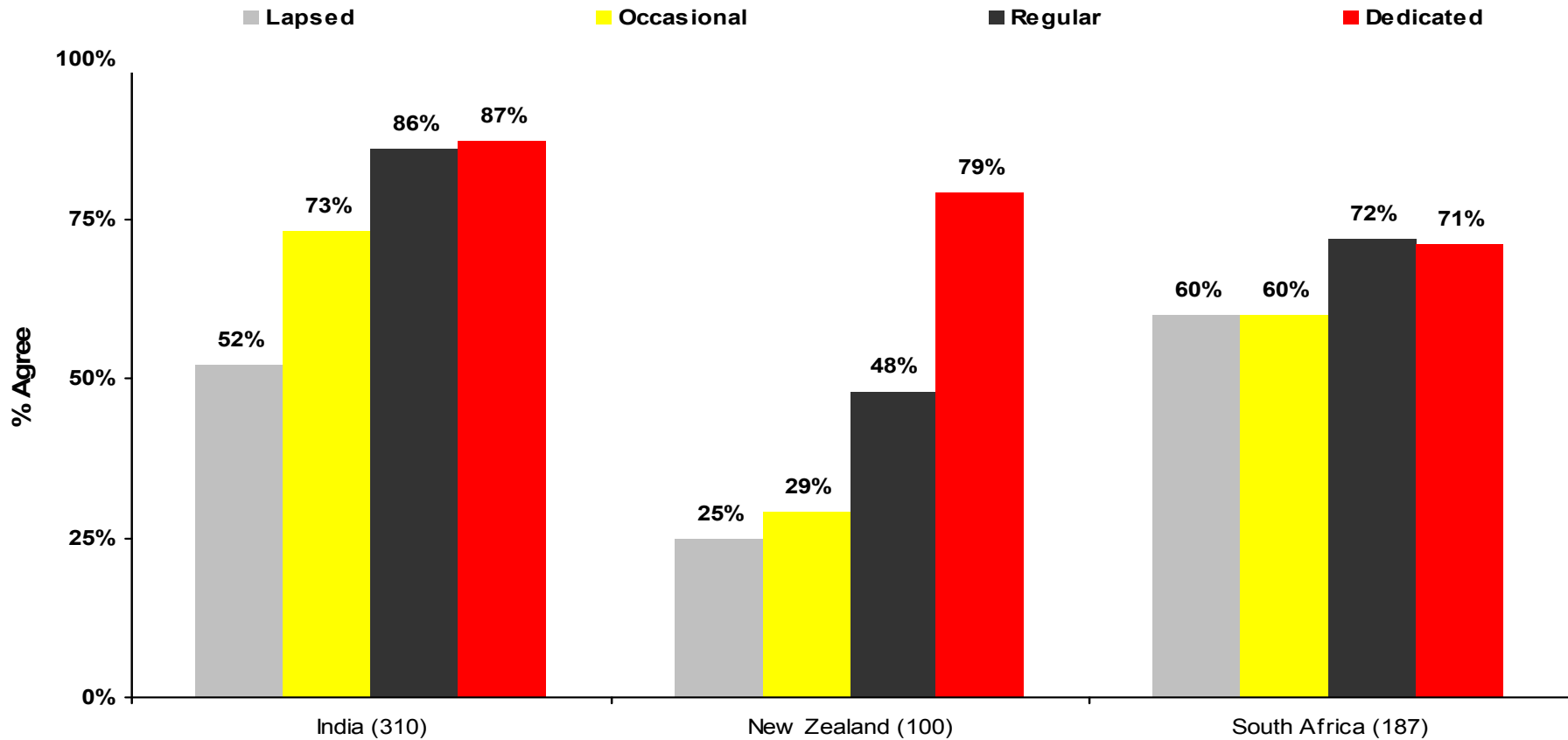
Base: Cricket followers who favour either Domestic T20 or International T20

Q. Do you think that your interest in T20 is likely to develop your interest in other forms of the game?



Is interest in T20 likely to develop interest in other forms of the game?

The most engaged segments demonstrate an even stronger level of agreement that T20 could lead to greater interest in other forms of cricket



Base: Cricket followers who favour either Domestic T20 or International T20

Q. Do you think that your interest in T20 is likely to develop your interest in other forms of the game?



Test World Championship

Test World Championship – Influence on Interest in Test Cricket

Amongst regular followers of test match cricket in particular, a Test World Championship would provide a notable boost to levels of interest in Test cricket, with the most positive impact seen in India and South Africa.

Even amongst those who hardly ever follow Test Match cricket, there is a strong level of agreement that a Test World Championship would increase their interest in Test Match Cricket.

% Test World Championships would boost interest in Test Match Cricket

India

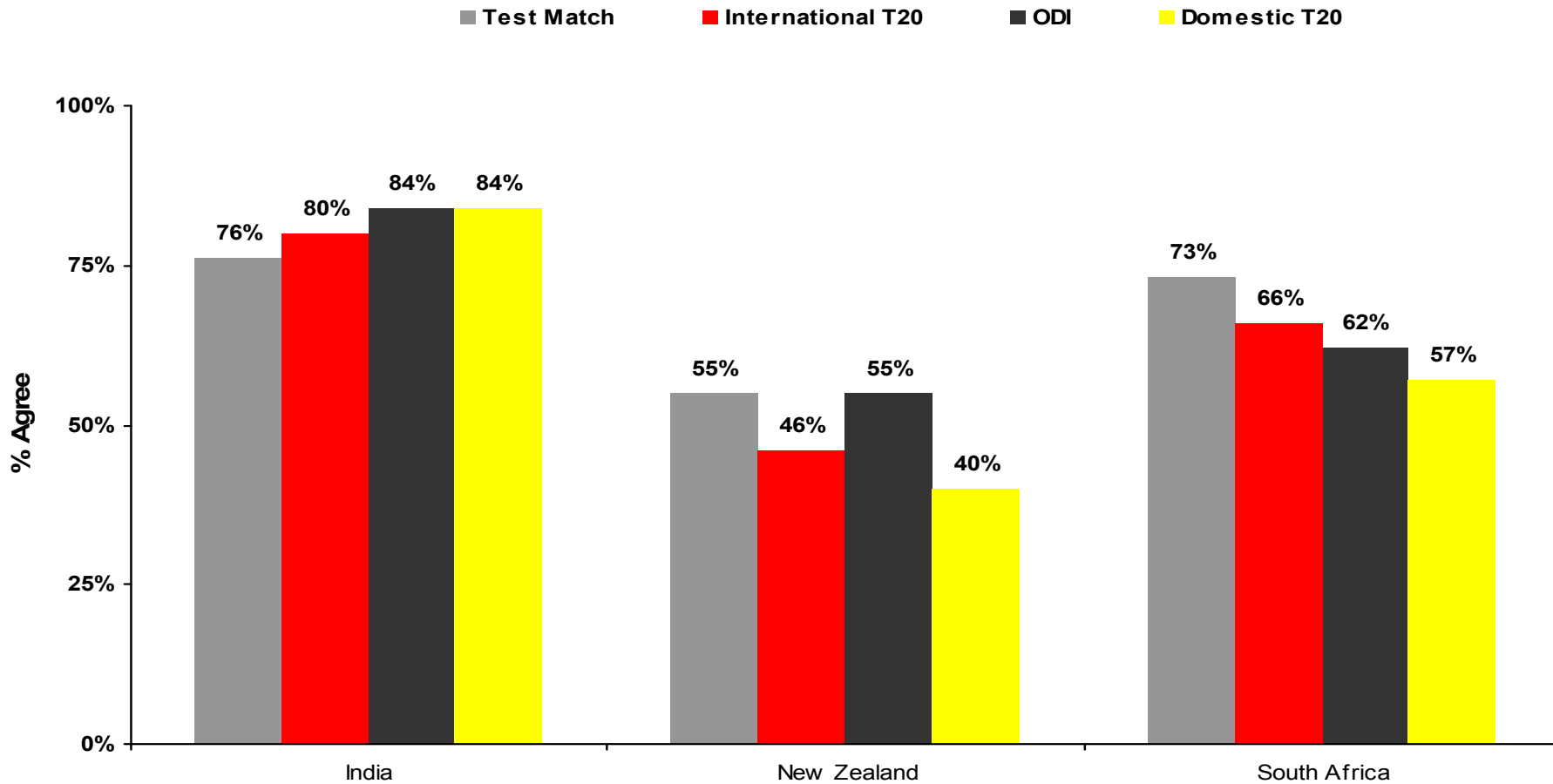
New Zealand

South Africa

Frequency following Test Cricket	India	New Zealand	South Africa
Regularly	83%	57%	77%
Sometimes	73%	56%	57%
Hardly Ever	63%	42%	54%

Test World Championship – Influence on Interest - By Favoured Format

Amongst respondents in India, an overwhelming majority claim that contribution to a Test World Championship would increase their interest in Test Match cricket – particularly amongst those who favour the other formats of the game. Whilst it is less clear cut in New Zealand, there are still a significant number for whom it would positively affect their interest in the Test Match format.



Base: c. 500 cricket followers per market

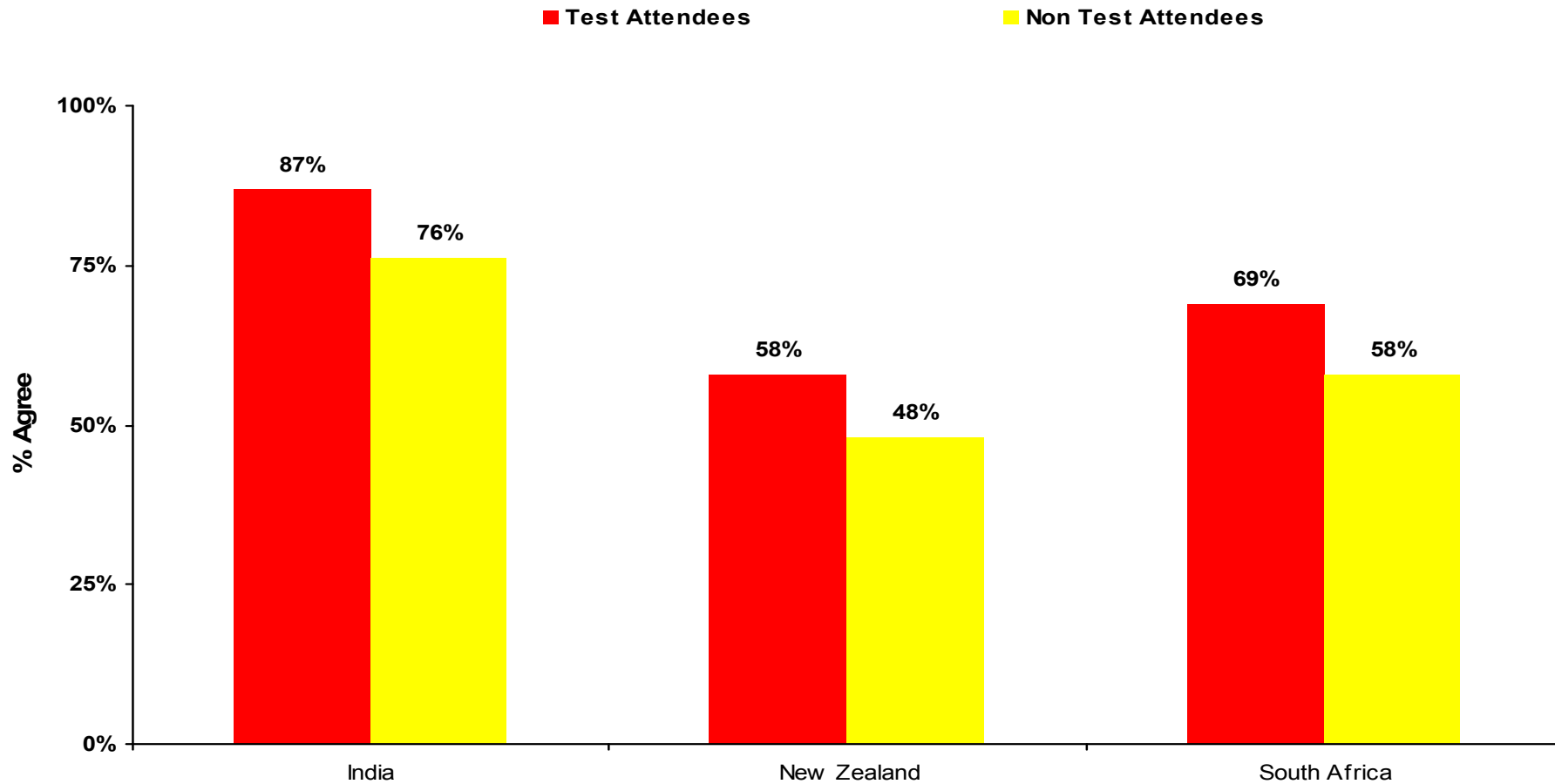
Q. If the result of every Test Match contributed towards an overall Test World Championship, would this increase your interest in Test Match Cricket?

Q. What is your favourite cricket format to follow?



Test World Championship – Influence on Interest – By Test Attendance

The concept of a Test World Championship would increase interest in Test Match cricket amongst those who have never attended a Test Match, but would provide a greater boost to those who have attended in the past.



Base: c. 500 cricket followers per market

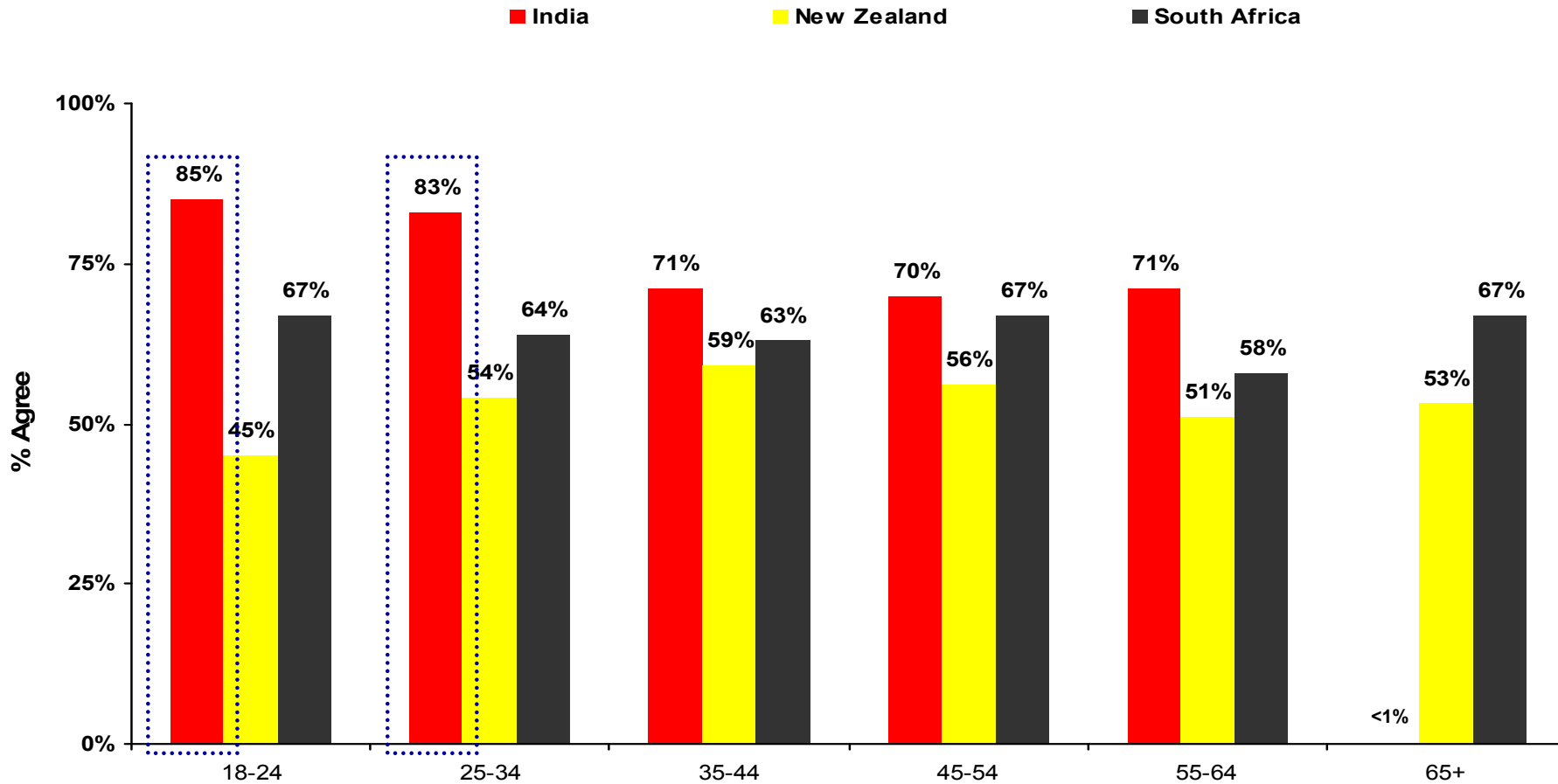
Q. If the result of every Test Match contributed towards an overall Test World Championship, would this increase your interest in Test Match Cricket?

Q. Have you ever attended a test match?



Test World Championship – Influence on Interest – By Age Group

Indian cricket followers demonstrate a greater interest in the Test World Championship overall, but the interest is particularly strong amongst the youngest respondents, suggesting it may be an effective method of further engaging the future generations of fans in that market. New Zealand and South Africa see a more consistent level of agreement across the age groups.



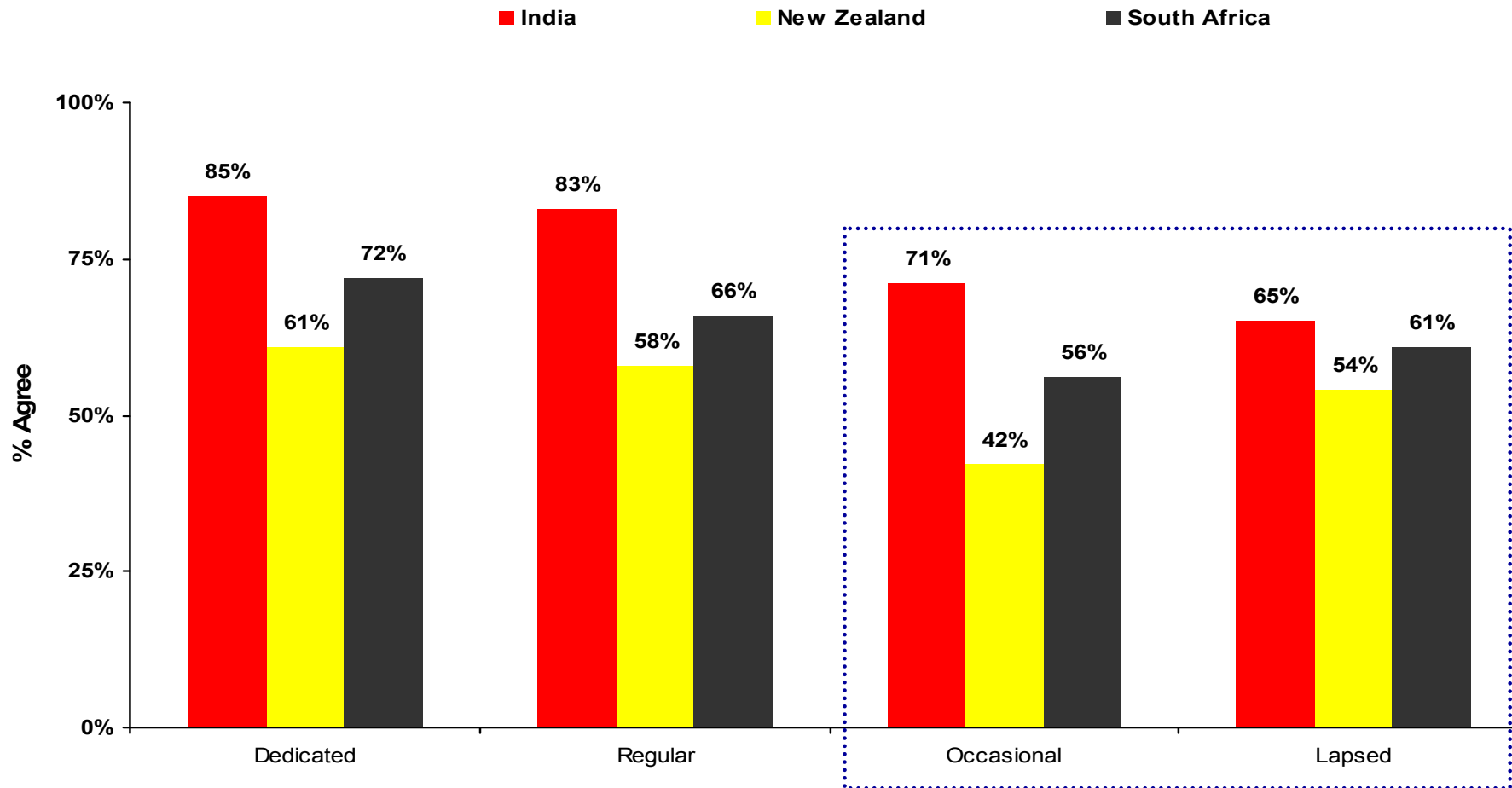
Base: c. 500 cricket followers per market

Q. If the result of every Test Match contributed towards an overall Test World Championship, would this increase your interest in Test Match Cricket?



Test World Championship – Influence on Interest – By Cricket Fan Profile

The strongest endorsement for the Test World Championship comes from the most strongly engaged of the existing cricket fans, reducing the risk of changes alienating the core fan base. It would also revive interest amongst the less engaged groups, particularly those whose interest in the game has lapsed



Base: c. 500 cricket followers per market

Q. If the result of every Test Match contributed towards an overall Test World Championship, would this increase your interest in Test Match Cricket?



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