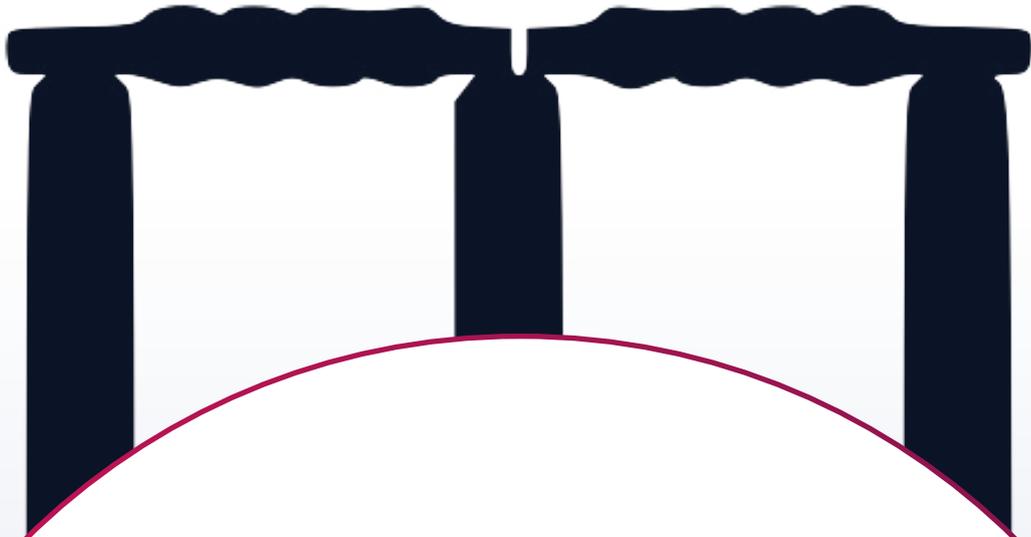


horizm



THE GLOBALIZATION OF

T20

CRICKET

The rise of T20

Cricket is a sport with a rich history across England and the former British colonies, but at the start of the 21st century, audiences and sponsorship revenues for the traditional game were dwindling.

In one of the most disruptive changes to any major sport in modern times, Twenty20 (T20) was created, a new shorter form of cricket designed to be faster paced and more accessible to the younger audiences that the authorities desired.

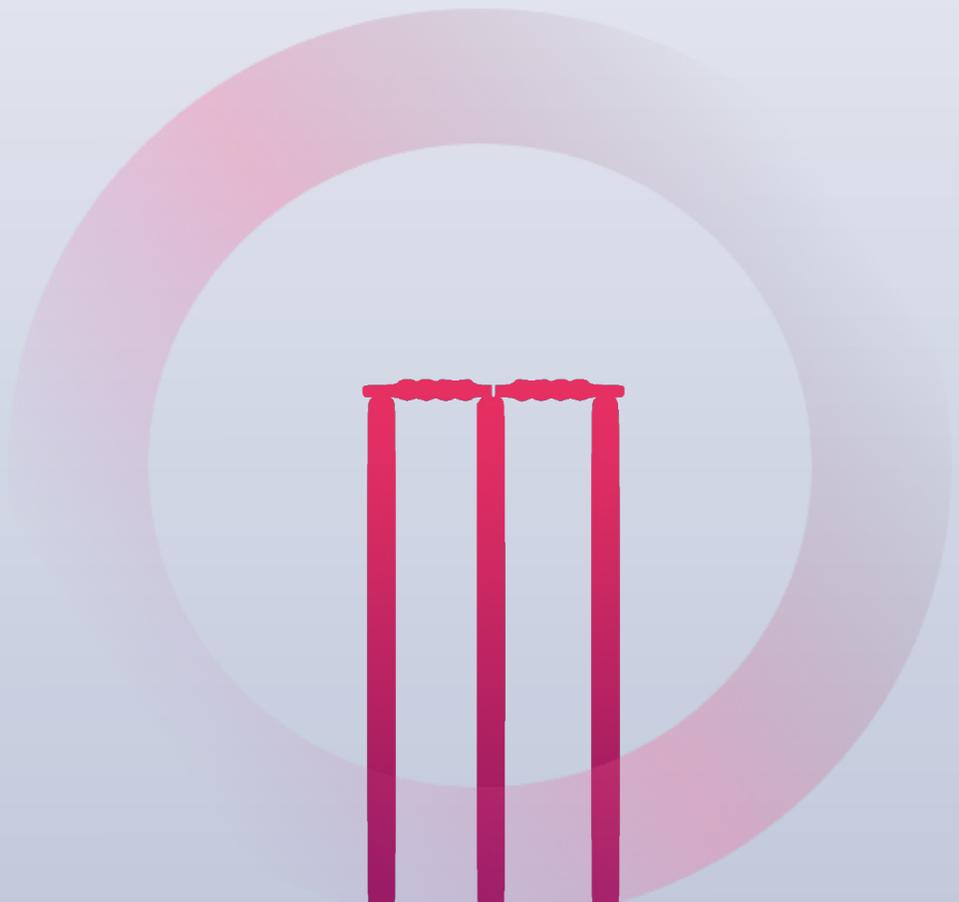
The first professional T20 game was played in England in 2003, and from there the shorter form of the game has gone from strength to strength, growing immensely in popularity and leading to huge changes in the way that the game is played, consumed and commercialized across the globe.

In particular, the advent of the Indian Premier League (IPL) in 2008 was a seminal moment in the history of cricket which has begun a period of franchise leagues, increasing commercialisation and growth in popularity in the shorter form of the game.

With the tournament creation coinciding with the early growth of social media platforms, the IPL and its teams now have huge follower numbers across Facebook, Twitter, Instagram, and YouTube. In this report we will look at how the IPL compares on these channels with other, more historic, major sporting tournaments, what the audience numbers say about the market share of T20 globally and what the potential is for future growth.

The Globalization of T20 Cricket will look at these areas and more as we seek to understand the global reach – and commercial potential – of one of the most popular sporting tournaments in the world.

We hope you enjoy!



The sporting comparison

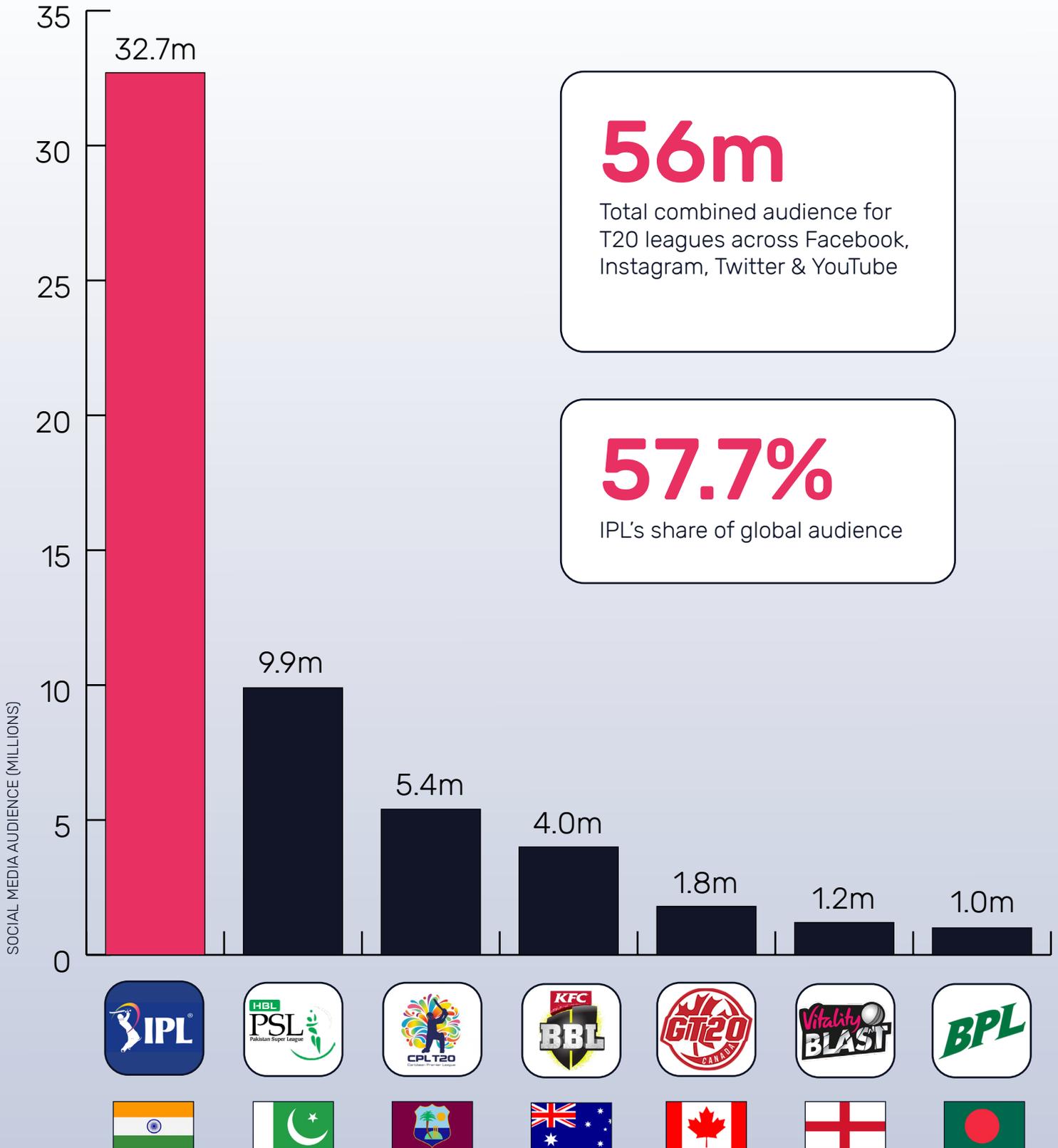
Despite the tournament's short duration – it lasts only two months – meaning there are fewer fixtures than most major sports leagues, the IPL's main four accounts still have a higher following than two of the US' big leagues in the MLB and NHL. Additionally, when looking at major tournaments in tennis and golf, we can see that despite the IPL being established decades – and in some cases, almost centuries – after them, the IPL has easily outstripped them in terms of social media audiences.

IPL V OTHER GLOBAL SPORTS LEAGUES			COMBINED SOCIAL AUDIENCE*
1		NBA	143.2m
2		Premier League	116.5m
3		NFL	72.4m
4		Formula 1	32.9m
5		Indian Premier League	32.7m
6		MLB	26.1m
7		NHL	17.2m
8		Wimbledon	11.9m
9		The Masters	3.0m
10		Super Rugby	1.7m

*COMBINED SOCIAL REACH ACROSS FACEBOOK, INSTAGRAM, TWITTER & YOUTUBE OF THE INDIVIDUAL LEAGUE. DOES NOT INCLUDE THE REACH OF MEMBER TEAMS OR ATHLETES.

Global T20 League Audiences

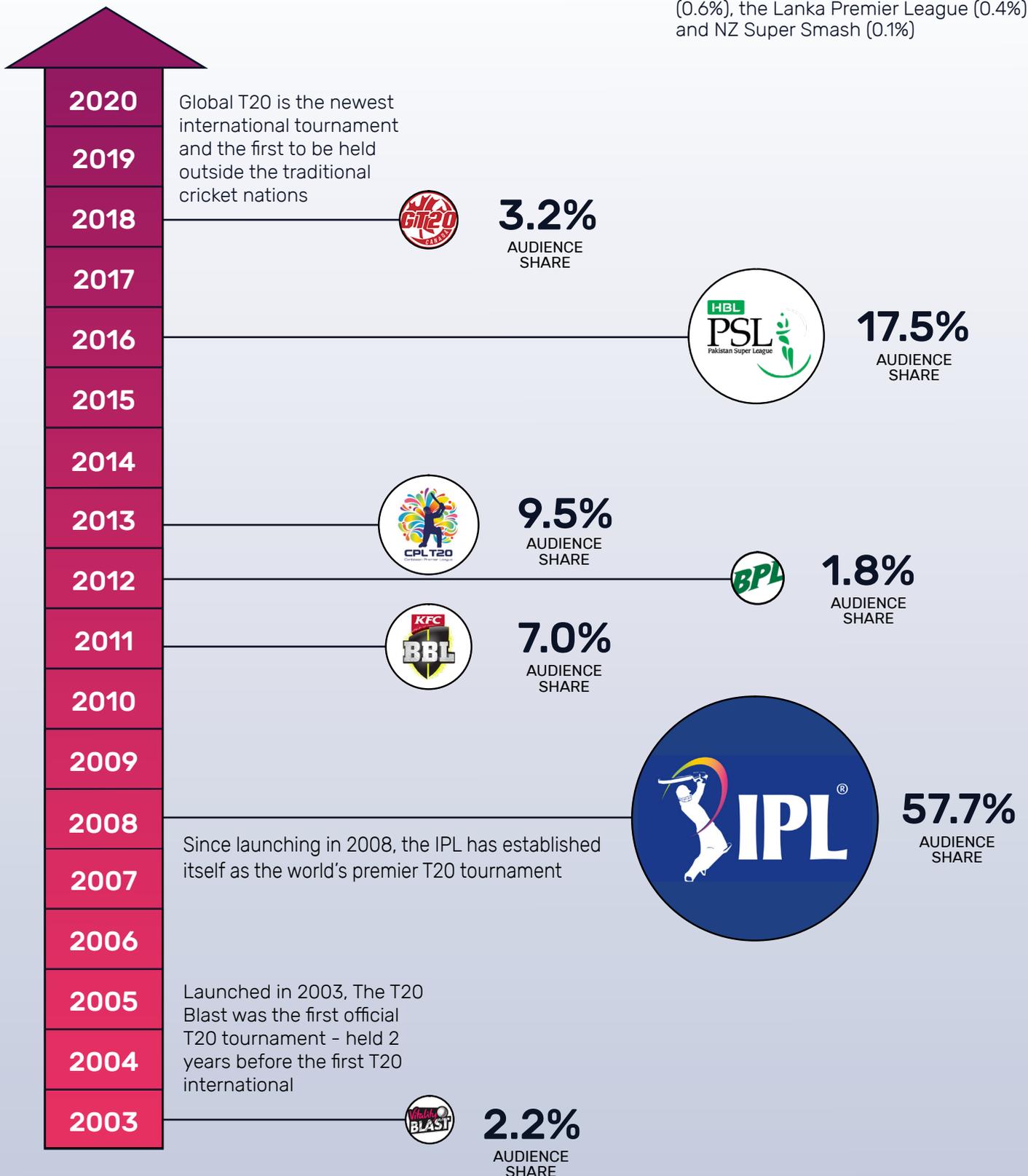
The IPL's social media handles on the main four platforms (Facebook, Instagram, Twitter and YouTube) have gained a following of over 30 million since 2008, making it comfortably the most followed league in cricket.



Timeline & market share for 1m+ tournaments

56m
FOLLOWERS

1.1% The combined market share of the three tournaments with followings under 1m - the Mzansi Super League (0.6%), the Lanka Premier League (0.4%) and NZ Super Smash (0.1%)



IPL as a driver of growth

A look at the timeline for tournament creation and the social media market share graphic shows just how much the IPL dominates the global audience but also illustrates how the tournament has been a driver for the growth of other leagues around the world. The majority of major tournaments were formed post-2008 and have benefited from new fans being attracted to cricket through the IPL.

Although this factor is somewhat intangible looking at the two leagues formed pre-2008 does highlight a potential correlation. The NZ Super Smash has the lowest share of global audience and the world's oldest competition, the T20 Blast is based on the England & Wales Cricket Board (ECB)'s county system rather than the franchise model the IPL introduced. The ECB look to be learning from the success of the IPL with the launch of its a new tournament The Hundred, due to start this summer, with a new, even shorter, more high octane format which will mimic many elements of the IPL including a player auction and city-based franchise system.

New markets: The North American opportunity?

The latest tournament added to the T20's growing roster is the Global T20 league in Canada (GT20). The tournament, first held in 2018, was the first to take place in a country outside cricket's main playing nations and has featured a mix of the world's top T20 stars. Despite only two editions of the tournament having been played (the 2020 edition was postponed due to COVID), GT20 has already amassed a digital audience across the four social channels is of almost 1.8 million.

The fact that the competition can boast such a large digital audience in such a short space of time can be explained by a number of factors. Firstly, it is taking place in a sporting culture that is used to the franchise model and the immediacy of fandom it requires. Secondly, Canada has a large diaspora from the Indian subcontinent and the tournament allows the many passionate IPL fans amongst them to engage with a tournament on "home turf". Finally, the presence of international stars from cricket's top nations plus the razzamatazz that T20 brings allows the tournament to attract fans both old and new.

Following the success of GT20 Canada, another franchise T20 league is being launched next year in the USA (Major League Cricket) and with many of the above success factors equally – if not more – relevant in the US, the commercial potential for the league looks promising, particularly for brands that have an interest in the Asian market.

Conclusions

This analysis of the Indian Premier League and its fellow T20 cricket tournaments around the world highlights not just the popularity, in a global sporting context, that the IPL has managed to generate but also, the rise of T20 franchise tournaments that the IPL has helped to fuel.

An important consideration when looking at the tournaments – and indeed the sport’s – popularity is the geographic breakdown of the audience. The IPL’s reach and impressive growth is rooted in the huge popularity of cricket in the Asian subcontinent compared with the more western / global audiences of the other major competitions we have looked at in this report. The IPL is understandably dominated by Indian players and fans and this characteristic has undoubtedly helped drive international growth of T20 through interest amongst Asian ex-pats. However, the success of high-profile players from smaller cricketing nations like Afghanistan, Nepal and Bangladesh, in raising the profile of the tournament, exhibits how the IPL could grow even further if players from more nationalities begin to participate over the coming years.

The primary aim behind the creation of Twenty20 cricket was to attract new, younger audiences to the game and with it, new sponsorship dollars. When looking at the IPL, it seems this aim has largely been met; data captured on the Horizm platform shows that the biggest age demographic for one IPL team was between 18-24, which ranks lower than many other rights-holders.

With a combined social audience in excess of 56m, T20 has quickly amassed a huge global following, driven largely by the popularity of the IPL. One of the ways this growth can continue will be branching out to new markets and the beginning of franchise leagues in North America offers up this opportunity although they will have to compete for fans’ attention in an increasingly crowded sports marketplace.

