



Expert Speak

The Evolving Face of Cricket, Braving one Challenge at a Time

Dhiraj Malhotra

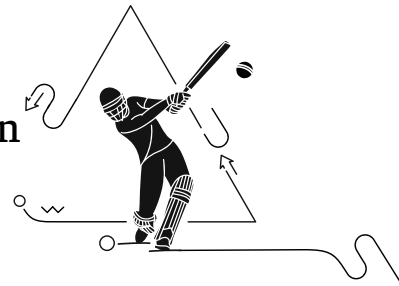
General Manager - Game Development and Cricket Operations, Board of Control for Cricket in India

The emergence of franchise cricket, especially the Twenty20 format, has introduced new avenues for fans to enjoy the game and for businesses to tap into this market. Digitisation of cricket, including the use of data analytics and gamification, is accelerating viewer engagement and retention. While COVID-19 has forced upon many modifications to cricket, several of these adaptations are likely to have a long-term effect and will only accelerate the game's evolution.



In India, Cricket is Religion and the Players are Gods

– so the popular saying goes!



Cricket has always had a huge commercial pull in India. By 2020, it grabbed an 87% share of the estimated ₹58.94 billion Indian sports industry.¹ Ever since its introduction well over a century ago, cricket has come to be much loved amongst all sections of society. The game has constantly evolved—from the traditional 5-day test match played since 1877, to the pacier 50-over one-day international (ODIs) started in 1971, to the single innings 20-over Twenty20 (T20), the newest, shortest and fastest format of the game introduced in 2005.² The main driver behind this evolution is to keep with the mindset of the viewers today and to see what they are looking for—gripping, intense and action-packed games that do not last an entire day. Given the high-octane action witnessed in the Twenty20 format, viewership has attracted many more women and children in India. This was not the case earlier. And that is why at The Board of Control for Cricket in India (BCCI), we are constantly trying to grow and offer something new that is more interesting for the fans and viewers.

At one point, the Indian professional cricketing sphere was dominated by inter-country rivalries and tournaments. Unlike other sports, international cricket, be it bilateral or multi-country tournaments, has always been much more widely played than national, inter-franchise tournaments. However, by the mid-2000s, the franchise model for cricket proved to be the way forward. Every sport had it; if you look at baseball, football, basketball, or any top sport globally, franchise format happens everywhere. It was only a matter of time before it would catch on in India. BCCI started the Indian Premier League (IPL) in 2008 based on the shorter, edgier and glamorous T20 format, and it took the country by storm. Proclaimed as 33% cricket, 33% entertainment and 33% business,³ IPL was a big business and

¹BI India Bureau. Indian Sports Industry in 2020 is Estimated at Rs 5894 crore; cricket claims 87% share of sports sponsorship pie: GroupM ESP. Business Insider. Retrieved from https://www.businessinsider.in/advertising/media/article/indian-sports-industry-in-2020-is-estimated-at-rs-5894-crores-cricket-claims-87-share-of-sports-sponsorship-pie/amp_articleshow/82253683.cms

²The Three Formats of Cricket. International Cricket Council. Retrieved from <https://www.icc-cricket.com/about/cricket/game-formats/the-three-formats>.

³Paswan, P. (2013, February 19). Do franchise based leagues augur well for Indian sports? Sports Keeda. Retrieved from <https://www.sportskeeda.com/football/do-franchise-based-leagues-augur-well-for-indian-sports>.

commercial success and is now the world's most-watched and richest cricket league.

Over the last decade, cricket franchise leagues have come up in many countries —the Indian Premier League (IPL), Big Bash League, Bangladesh Premier League (BPL), Pakistan Super League (PSL), Caribbean Premier League (CPL), the soon-to-be-launched Hundred, etc. Each league has had some measure of success, with its attraction, the sponsorship money partners it has garnered, and the new viewers and fan bases that it has gathered.

Convergence of Cricket with Real-Time Data Analytics

If data is the new oil, then cricket has no shortage of fuel to power it! With data technology and AI-based systems gaining more foreground across industries, cricket is not behind. In cricket, data analytics serves a dual purpose, one benefitting the players and the teams, and the other serving viewers and fans sitting at home.



On the field, each move by a player is analysed and counter-analysed. For example, as soon as a batsman gets out, the first thing he does is sit with the team's data analyst and trainers to ponder over his performance and dismissal. Data analysts record not only the whole game but also extraneous factors which might affect player performance. Attributes of each player, be it the batsman or a bowler, are broken down and studied individually. Such behavioural deep dives into the player psyche help identify and plug player vulnerabilities. The captain, the coaches, and the players all make their strategy based on the available data and opposition research. Data has truly become the twelfth player on the team!

On the other side of the TV screen, the end consumer is very involved with the game when watching a match. One gets to study the game in detail through numerous

permutations and combinations of data for different batsmen and bowlers a game could reveal. This facilitates the overall viewership experience; it feels like one has an inside seat and is involved in the sport. Such advanced analytics provided in real-time has been a win-win situation. The viewer gets an inside perspective, while the TV broadcaster benefits because it enhances their broadcast experience and keeps viewers hooked.

Additionally, many viewers today are literally thinking outside the box. They are engaging with cricket, and especially the IPL, on mobile and off-the-TV screen. Viewers' interest is being kept alive by exposing them to the "Netflix approach." Under this, an artificial intelligence (AI) algorithm suggests clips to view based on a viewer's viewing history. Such behavioural modelling techniques are breaking down viewer habits into their constituent attributes, which helps content providers predict viewer choices.

Digital Engagement through Gamification and Fantasy Sports

With the foray of sports into the virtual world, online gaming and fantasy sports have become a massive part of the cricket scene. Over the last five years, fantasy sports have exploded in India and are witnessing exponential growth. This growth is driven primarily by the tech and sport-savvy Indian millennials who have



access to improved digital infrastructure. In 2019, the Indian online gaming industry was valued at ₹65 billion and is slated to grow at a 40% CAGR.⁴ Per a KPMG and Indian Federation of Sports Gaming (IFSG) report, 100 million fantasy sports users were estimated in India in 2020,⁵ with apps such as Dream 11, My Team 11, Mobile Premier League (MPL) leading the market.

⁴Gutshot Magazine (2020, March 30). FICCI-EY report claims online gaming to grow at 40% CAGR. FICCI. Retrieved from <http://www.ficci.in/ficci-in-news-page.asp?nid=21040>.

⁵(March 2021). The evolving landscape of sports gaming in India. Indian Federation of Sports Gaming (IFSG) and KPMG. pg. 6. Retrieved from <https://assets.kpmg/content/dam/kpmg/in/pdf/2019/03/online-gaming-india-fantasy-sports.pdf>.

As a 'manager' of a fantasy sports team, gamers pick players based on real-life athletes who would participate in upcoming matches. Because the contestant wins or loses depending on the performances of the selected players in real life, managing a team requires in-depth analytical knowledge about the players. With die-hard enthusiasts and novices able to put their cricket knowledge to the test alike, fantasy cricket is enjoying a great degree of engagement. With this increased engagement, passive viewers are getting actively involved, keeping them at the edge of their seats. One gets a more authentic and engaging experience augmented with enhanced understanding and in-depth involvement in the sport.

Fans are getting involved with fantasy sports even when they are not actually watching live cricket. The amalgamation of gamification or fantasy sports and social media interaction adds an interesting flavour to enhance interest. With increased investor interest, new revenue streams are being realised on account of virtual betting, in-app purchases and other social media-based activities.

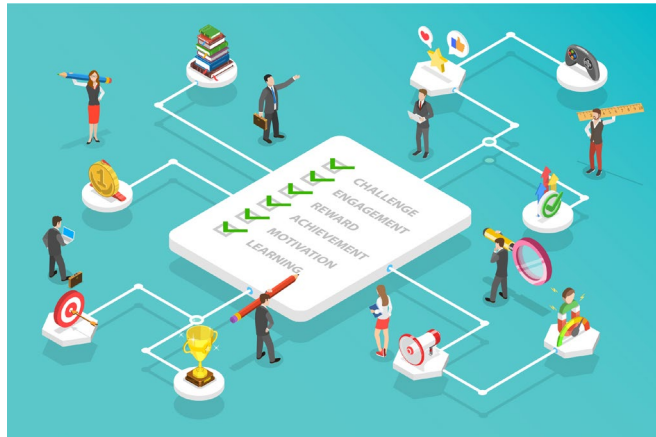
Additionally, cricket viewership has become more digital today. Each IPL franchise has its own virtual fan watch parties wherein when the match is going on, they interact with fans through social media. The fans are watching on TV, but they are interacting with each other while watching, which they cannot do in the stadium. Two-way communication between the viewer and the broadcaster or the franchise has opened up a whole gambit of possibilities. As an administrator of the IPL, that translates to growing revenues with more sponsorship avenues. Businesses realise where these eyeballs are and have paid heed. Of all the social media influencer activity among famous athletes in 2020, 92% of endorsement deals involved cricket players.⁶ Social media has changed the game, literally!

The digital adoption process has accelerated because of COVID-19. With no crowds permitted in stadiums and arenas, teams and leagues have had to relook and rework their digital marketing strategies to bring sports and sports stars closer to their fanbase. Digital content is a massive asset for teams right now, one which they are looking to leverage. Teams are investing in digital intelligence partners and are even using AI-powered techniques to manage and monetise their social media presence.

⁶BI India Bureau. Indian Sports Industry in 2020 is Estimated at Rs 5894 crore; cricket claims 87% share of sports sponsorship pie: GroupM ESP. Business Insider. Retrieved from https://www.businessinsider.in/advertising/media/article/indian-sports-industry-in-2020-is-estimated-at-rs-5894-crores-cricket-claims-87-share-of-sports-sponsorship-pie/amp_articleshow/82253683.cms.

Building an Ecosystem of Industries with Cricket

Cricket today has resulted in a symbiotic relationship among a multitude of industries. It has spawned a whole ecosystem of hybrid industries that enhance the experience of the end viewer and the people playing the sport. Even during the COVID-19 pandemic, the IPL has fostered a web of business



activity far beyond its reach. When one thinks of cricket, it is not just 11 players, the umpires and the dressing room—that is just the basic setup. There is much more than meets the eye; there are full-on TV production crews at each match, including cameramen, sound engineers, data analysts, etc.

The hotel industry is enormous, catering to players, commentators, officials, fans, TV crews etc. Each match in a particular city creates a need for 1,000+ rooms. The hospitality industry has evolved not just as per international standards but also on account of COVID-19 specific needs. Hotels have understood how to manage hospitality with secure bio-bubbles. They have recognised team requirements with more activities for players—be it practice facilities, recreation rooms, gymnasiums, a pool, or even customised menus for each team as prescribed by their dieticians and nutritionists.

Hospitality as a body serving the IPL is massive, reaching beyond the immediate teams themselves. Today, fans and enthusiasts are willing to pay for a social experience to enjoy the game. There is no shortage of people willing to pay to watch for want of a great experience. They want the complete package—fine dining and a glass of beer, all while enjoying good cricket. Although this has dampened a bit due to the pandemic, there are still pockets out there, and I fully expect the demand to grow as the pandemic ends.

Then there is merchandise—T-shirts, cricketing gear or caps. Earlier merchandise was only the playing gear. Now there are key chains, laptop covers, mugs and glasses etc. Merchandising has become a competitive industry in itself. Cricket has not remained a sport in a silo, but has evolved into something that permeates and nurtures so many industries, widening its already far-reaching influence.

COVID-19 and its Impact on Cricket and the IPL

Unlike working and studying from home, sports cannot be done virtually. Teams have to be physically present on the ground to play a match, even if it is within an empty stadium. In a world where people are working from home and have few distractions like movie releases, social gatherings or dining out, IPL's viewership has shot through the roof! During the pandemic, cricket has provided the common man with a much-needed distraction. Last year, IPL viewership was at its highest, and consequently, sponsorship was high as well. The IPL 2020 tournament amassed 400 billion viewing minutes by as many as 405 million viewers. It surpassed the record held by the ICC World Cup 2019 by 44 billion viewing minutes.^{7,8} Growth in viewership was also spurred by the broadcast of the tournament in five regional languages. IPL 2020 also reached out to a wider audience and saw an impressive viewership growth of 24% among women and 20% among children.⁹

It is impressive how the largest cricket franchise in the world has been pulled off amidst the COVID-19 pandemic. Initially, there were apprehensions about hosting the series, but once the 13th IPL season started in United Arab Emirates (UAE), there was a sense of relief. Everyone was sitting at home, quarantined, but there was something to do every evening when one switched on the TV. In the end, IPL 2020 was a success both from a sporting and as well as from a commercial perspective. The tournament returned to India with the 14th IPL season hosted domestically in April-May 2021.

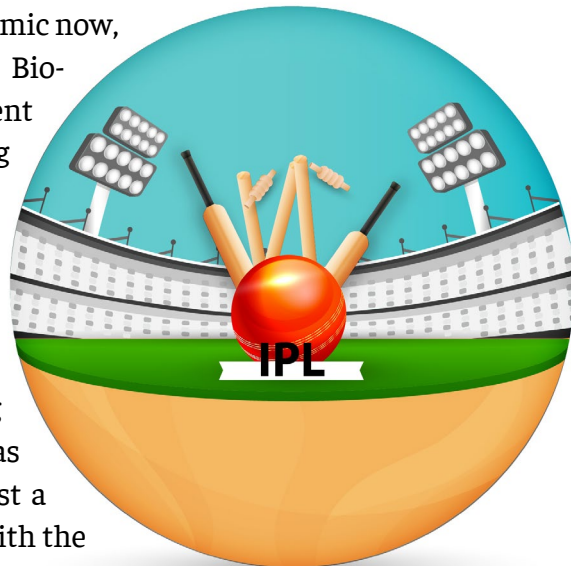
⁷James, N. (2020, November 20). Despite early bouncers, IPL 2020 scores a big hit. The Hindu Business Line. Retrieved from <https://www.thehindubusinessline.com/news/sports/ipl-2020-the-most-successful-season-ever-records-400-billion-minutes-of-tv-consumption-star-india/article33141563.ece>.

⁸(2021, March). Playing by New Rules: India's Media and Entertainment sector reboots in 2020. pg. 44. FICCI-EY. Retrieved from https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020.

⁹(2020, November 20). IPL 2020 TV viewership reached 31.57 million average impressions: Star India. Hindustan Times. Retrieved from <https://www.hindustantimes.com/cricket/ipl-2020-viewership-reached-31-57-million-star-india/story-30TdwVw3LHMA0U25m7cCHN.html>.

COVID-19 has affected the game of cricket and spurred new innovations and ways of hosting tournaments. The logistics involved to pull off a large event safely is a massive challenge! For the last two seasons of IPL, bio-secure environments were set up to minimise cross-infection. Hotels, stadia and practice facilities were divided into zones where in-person interaction and access were monitored. The movement of sporting and support staff was monitored using sensors, and frequent COVID testing was the norm.

We are in the second year of the pandemic now, and sports have resumed globally. Bio-bubbles are now a normal environment to be in. With innovative hosting arrangements and technologies that emerged during the COVID-19 pandemic, there will be learnings, and some of the effects will be long-lasting. However, with the second coronavirus wave in India affecting everyday life on a broad scale, it was always going to be challenging to host a large-scale tournament. Eventually, with the bio-secure bubble bursting and multiple players and support staff testing positive, the IPL season 14 was indefinitely suspended on May 4, 2021.¹⁰ Cricket will not be the same, at least in the near future. A different brand of cricket will be witnessed in the coming years.



Management Takeaways Beyond the Boundaries and Wickets

At the end of the day, professional cricket, including the IPL, are commercial enterprises. Like most businesses, cricket involves substantial research, forward planning and execution. Taking the example of one full IPL cycle, planning starts months before the first game. Managers decide player budgets and how much

¹⁰ET Bureau. (2021, May 05). Covid takes down IPL: League suspended indefinitely after multiple cases in bio-bubble. The Economic Times. Retrieved from <https://economictimes.indiatimes.com/news/sports/indian-premier-league-suspended-for-this-season/articleshow/82384337.cms>.

they are willing to auction for a player. Once a team is constituted, management plans out the roadmap for the rest of the season. Multiple variables are at play, including the existing market, competition, challenges being faced, mitigation strategies etc. As with any other business, meticulous preparation and planning for all eventualities are important.

Beyond the enormous commercial value it generates, cricket in India is associated with a billion hearts. The importance of cricket is much beyond recreation, and keeping the sport going is the key. With changing times, cricket has evolved to survive and adapt through the advent of new formats. It has become much more intense and entertaining in the process. More importantly, it has evolved to keep up with the pace of life.

Dhiraj Malhotra heads Game Development and Cricket Operations at the Board for Cricket Control in India (BCCI). Before joining the governing body of cricket in India, Dhiraj was intimately involved in the Indian Premier League (IPL) as Tournament Director for three years and later as the CEO of the Delhi Capitals franchise. In a career spanning more than 20 years in the cricket industry, he has also held senior positions at the International Cricket Council (ICC) and has overseen operations of various ICC cricketing events.