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What You May Not Know About T20 Cricket...

NEWSLETTER ISSUE 02 | JULY 2016



Cricket is considered a religion in India and T20 is the latest format of worship. The year 2016 has seen several important T20 series in the first half of the year itself – Asia Cup, ICC World T20 & IPL.

We, at BARC, take a closer look at these series to understand the unifying and divisive factors across series in this format of cricket.

IPL is undisputedly one of the biggest properties in this format. It has therefore been analysed and dissected enough ensuring everyone has some rudimentary knowledge of its performance. We aim to look at IPL beyond the obvious parameters, and find something that is unexplored, to give a greater understanding on factors contributing to success of T20 format.

The newsletter has been divided into three parts



A

T20 cricket from a less explored angle

B

Convergence of social media conversation and TV viewership for IPL

C

IPL from elementary data science angle. Utilizing data science for testing entrenched views on IPL

The Touch Points Of T20 Cricket From Less Explored Angle Are

1. IPL Vs Asia Cup Vs ICC World T20

- a) Does IPL differ from other major T20 cricket series such as Asia Cup and World Cup T20? How?

2. Understanding the impact of T20 taking IPL as the reference

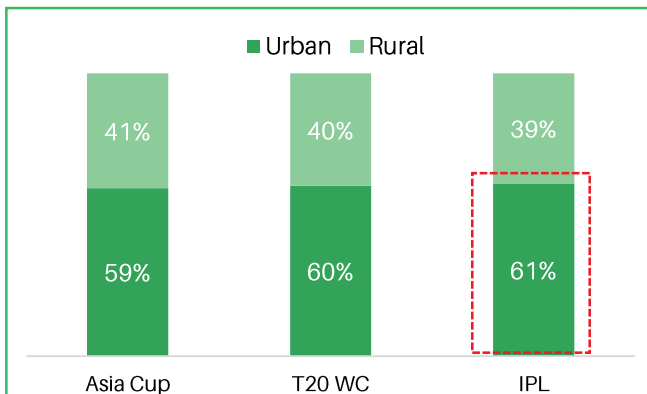
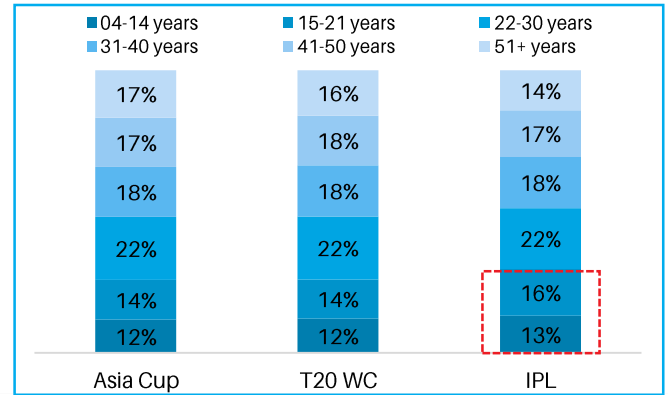
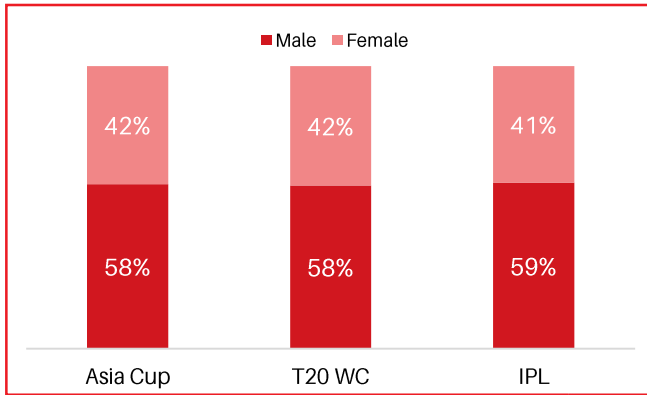
- a) By how much does the relative share of various Programming themes change during IPL?
- b) What is the impact of IPL across different channel genres in terms of **avg. time spent (ATS)** and impressions?
- c) How has viewership of Female vs Kids vs Male been by markets for IPL?
- d) Does home team's match result in IPL have any effect on the team's consecutive match's viewership in home market?
- e) Does the match score have any effect on the match viewership in IPL 2016?
- f) How does the typical week **after IPL** look like in comparison with pre and during IPL season?

Note: Source is BARC India. TG: 4+; Period considered: Wk50-Wk01 for Pre-IPL Period as non T20 cricket weeks; Only Live matches considered for IPL, Asia Cup & ICC World T20; 24-Feb to 06-Mar for Asia Cup, 15-Mar to 03-Apr for ICC World T20, 09-Apr to 29-May for IPL. Post IPL period 30-May to 5-June. Channels included in Analysis: IPL-Sony MAX, Sony ESPN, Sony ESPN HD, Sony Six, Sony Six HD; Asia Cup & ICC World T20-Star Sports 1, Star Sport 3, Star Sports HD1, Star Sport HD3. IPL time-bands include Mon-Fri 2000-2330 hrs. & Sat-Sun 1600-2330 hrs.

Note: The database used in the analysis is Week 41 onwards-All India OLD.

1.a. How T20 Cricket formats differ from each other?

Audience profile: Asia Cup vs ICC World T20 vs IPL



- All three T20 tournaments **do not differ in terms of NCCS composition**. NCCS C contributes relatively higher viewership than any other NCCS.
- However, contrary to popular views, **IPL does not show a higher skew towards Female audiences** in comparison to other T20 Cricket events.
- The age profile of IPL viewers differs from other series. **Kids and Youth** constitute a higher share of IPL viewership in comparison to Asia Cup and ICC World T20. Older age groups (41+ years) have relatively higher viewership contribution for Asia cup and ICC World T20.
- IPL has **marginally urban skewed viewers** as compared to Asia cup and ICC World T20. This may be due to the extra glamour attached to IPL.



Viewership Sensitivity by Markets

Market	Zone	Asia Cup (A)	T20 World Cup (B)	IPL	Change during IPL Over Avg. of A&B in %
Mah / Goa	West	17%	18%	19%	2% ▲
Guj / D&D / DNH	West	8%	7%	9%	1% ▲
UP/Uttarakhand	North	8%	7%	7%	0%
Pun / Har / Cha / HP / J&K	North	9%	8%	8%	-1% ▼
Karnataka	South	7%	8%	10%	2% ▲
West Bengal	East	6%	7%	6%	0%
AP / Telangana	South	10%	11%	10%	-1% ▼
Delhi	North	5%	5%	4%	0%
Rajasthan	North	3%	3%	4%	1% ▲
Madhya Pradesh	West	3%	3%	3%	0%
Bihar	East	2%	2%	3%	1% ▲
Odisha	East	3%	3%	3%	0%
Assam / North East / Sikkim	East	3%	3%	2%	0%
Chhattisgarh	West	5%	5%	2%	-3% ▼
Kerala	South	2%	2%	4%	2% ▲
TN/Pondicherry	South	8%	8%	5%	-3% ▼
Jharkhand	East	2%	1%	1%	0%

*Share of Normalised Impressions

- Mah/Goa and AP/Telangana are usually high contributing markets for any cricket series. Out of these, during IPL, Maharashtra further increases its share on the back of two IPL teams from the State - Mumbai Indians and Rising Pune Supergiants. *Surprisingly, zone pie for IPL remains similar to other T20 series. For example, West zone continues to contribute 1/3rd of total viewership despite having three state home-teams in IPL.*
- The pattern of viewership seems to be influenced by **presence of a state home team**, which can be observed in case of Gujarat and TN. Guj/D&D/DNH share increases for IPL on back of inception of the state's team, Gujarat Lions. Conversely, one of the factors contributing to the drop in TN/Pondicherry could be the cancellation of state's team, Chennai Super Kings.



Does viewership for advertising categories differ for Asia Cup vs ICC World T20 vs IPL?

Asia Cup	
Category	# Sponsors
Food and Beverages	2
FMCG	1
Media and Entertainment	2
Retail	1
BFSI	1
Consumer Durables	2
Construction and Real Estate	1
Automotive	1
Fashion and Lifestyle Accessories	
Garments and Textiles	1
IT and Telecom	1
Hotels, Hospitality and Tourism	

ICC World T20	
Category	# Sponsors
Consumer Durables	1
Automotive	3
Media and Entertainment	
Retail	
Food and Beverages	1
IT and Telecom	1
Garments and Textiles	
FMCG	
BFSI	1
Construction and Real Estate	
Fashion and Lifestyle Accessories	1
Hotels, Hospitality and Tourism	1

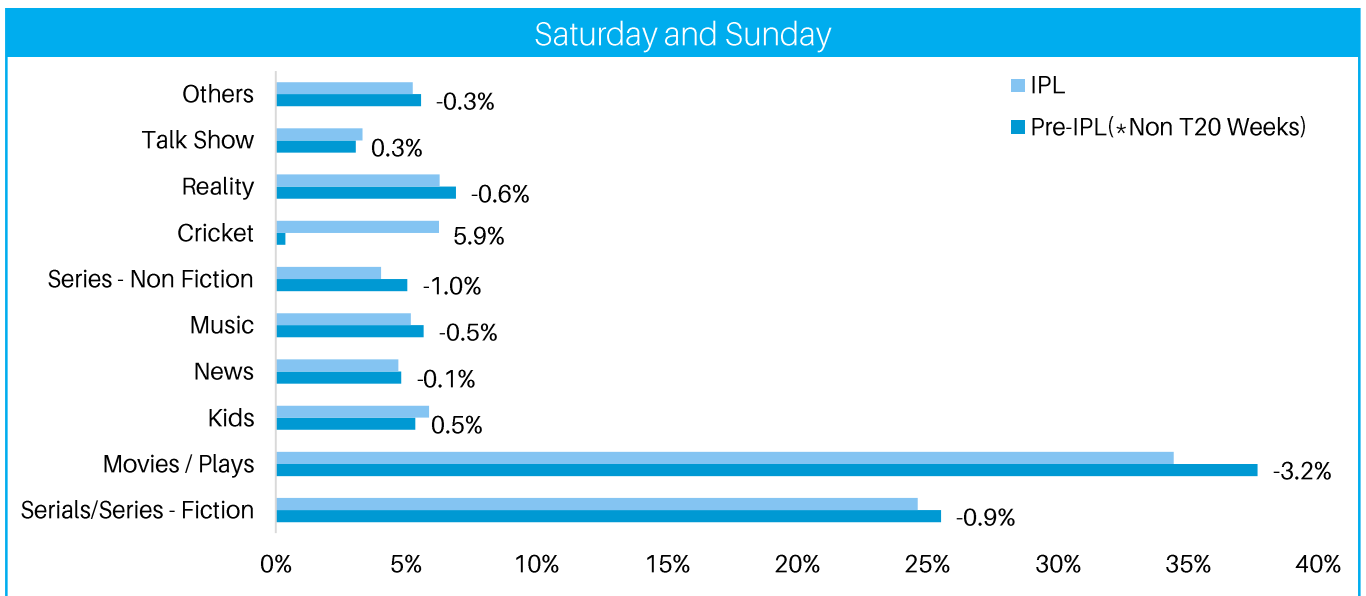
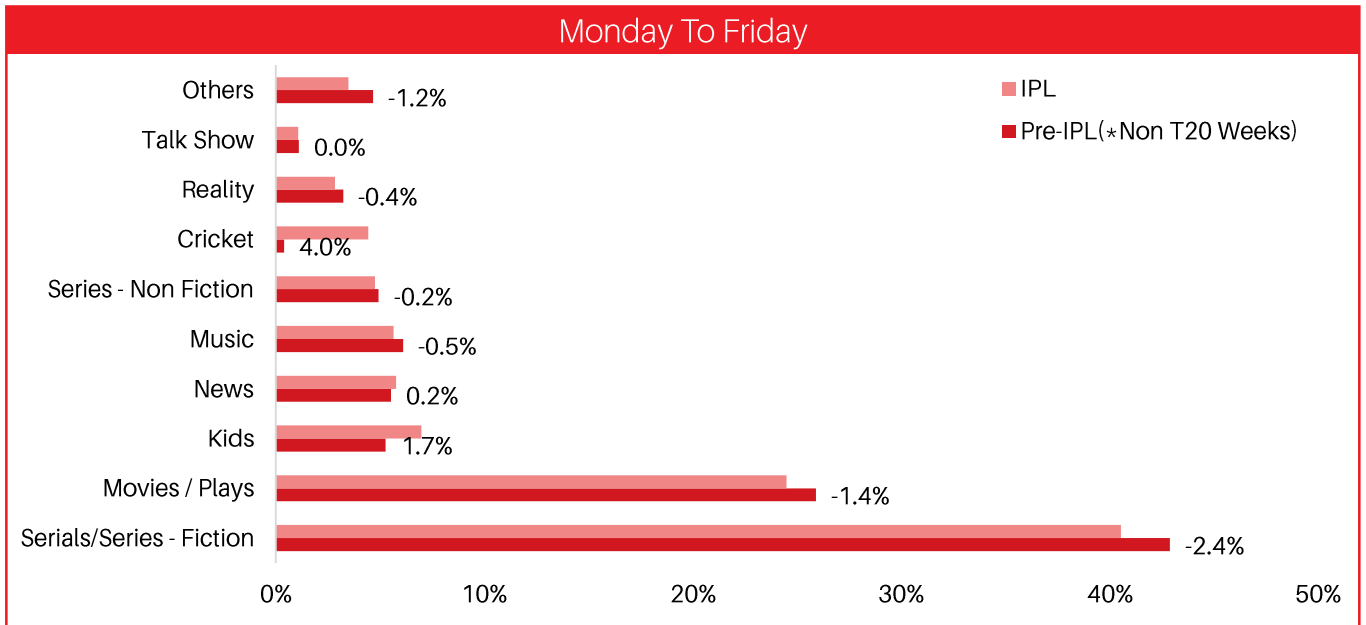
IPL	
Category	# Sponsors
Consumer Durables	2
Automotive	3
IT and Telecom	1
Food and Beverages	2
Retail	1
Media and Entertainment	1
Niche Sector	
FMCG	2
Construction and Real Estate	
Garments and Textiles	
Hotels, Hospitality and Tourism	
BFSI	2
Education	
Services	

*Categories sorted by Normalised Impressions

- Most of the Categories are present across all series. The Top Categories for each series is mainly **driven by sponsorship brands**. For example, Consumer durables is the biggest category by impressions per 10 sec on IPL, driven by 'Oppo' which is one of the key sponsor brands for IPL.
- However, there are some categories that are present exclusively on IPL – Education, Services and Niche Sector. Education and Services could be present due to the vacation period in schools and colleges which could help target younger generation and parents. On the other hand, Fashion & Lifestyle Accessories is the only category which is not advertised during IPL. This could be analysed from cost perspective and presence of these categories throughout the year with ad pulsing strategy.



2.a. Impact of IPL on Programing themes

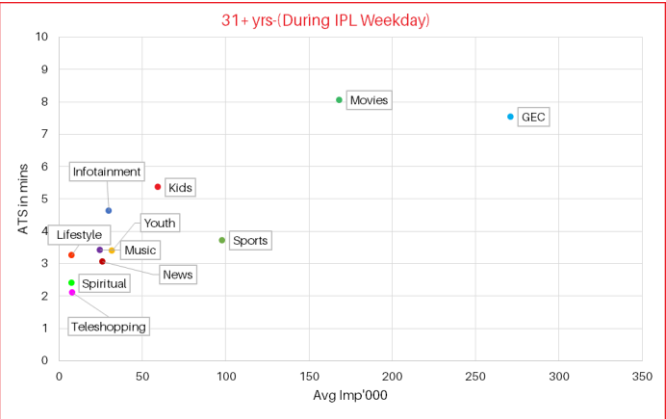
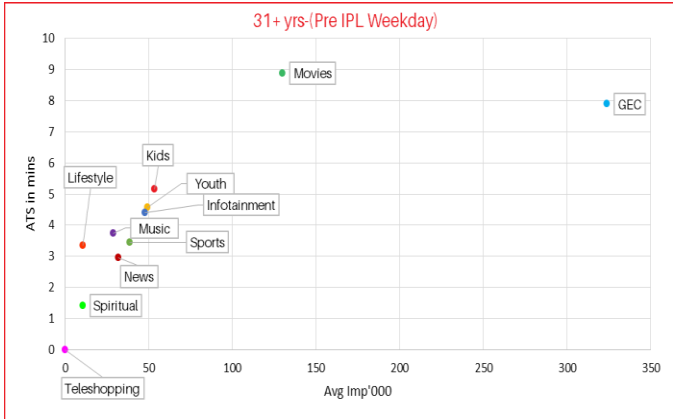
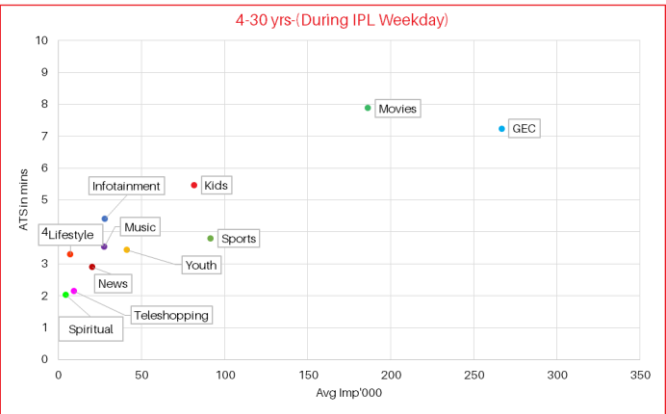
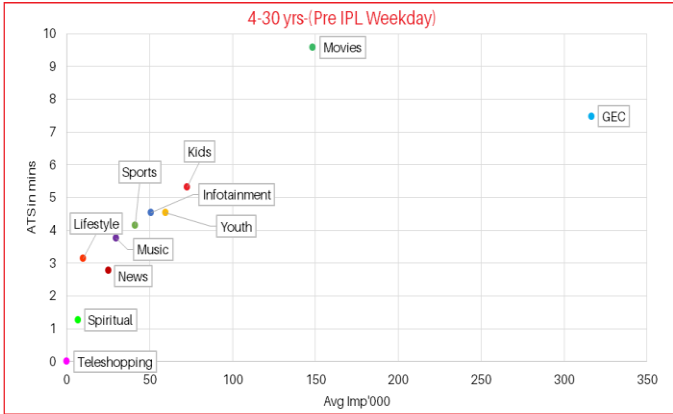


- The only program themes to show growth during IPL are Cricket and Kids. While Cricket growth is driven mainly by weekends, growth of Kids theme is by weekdays.
- Growth of **Kids** on weekdays, is followed by a commensurately high drop in Series- Fiction. This may be a result of summer holidays wherein the kids may be eating into TV viewing hours of the primary viewers of fiction series viz. their mothers.
- As opposed to that **Cricket** has grown significantly more on weekends, which may have resulted in a drop in viewership across all other themes.
- However, the drop for Series-Fiction is reduced on weekends which is in keeping with conventional wisdom of soaps being weekday centric.

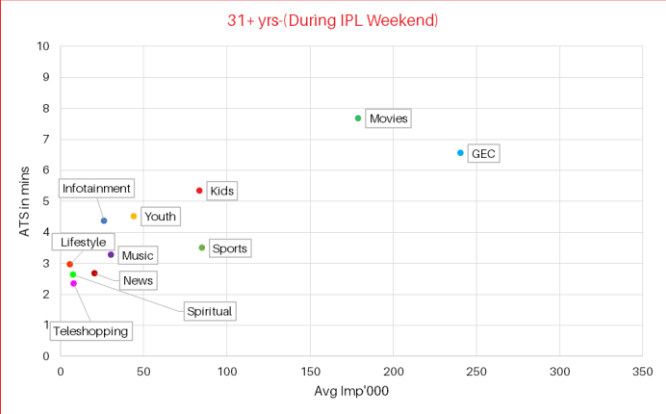
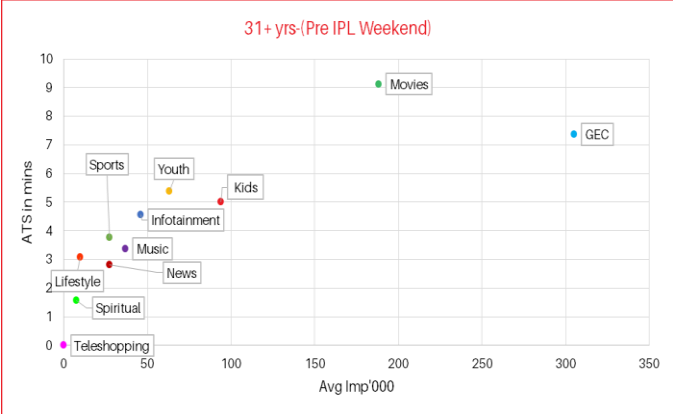
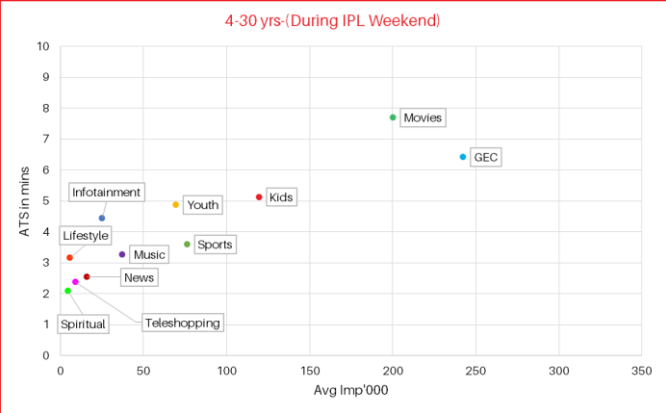
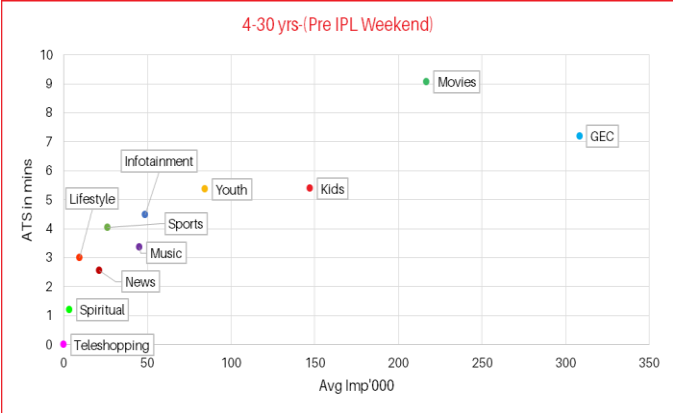
Note: Share of normalised impressions for IPL time bands. i.e. Mon-Fri 2000-2330 & Sat-Sun 1600-2330
*Non T20 Weeks: Wk50-Wk01

2.b. Impact of IPL on Channel Genres - By Age Groups

On Weekdays (20:00-23:30)



On Weekends (16:00-23:30)



GEC

Age Group: 4-30 yrs

- During weekdays impressions have declined. However, ATS for **GEC** has remained almost **unaffected** **indicating strong engagement**, even during IPL.
- On the other hand, weekend viewership as well as ATS during IPL have declined as compared to pre IPL period.

Age Group: 31+ yrs

- Among matured age viewers, **GEC** has largely remained **unaffected** in terms of ATS however, **impressions** have **dropped** during IPL.
- The GEC impressions drop among 31+ age group is sharper than 4-30 yrs during weekdays.
- Weekends see visible drop in viewership as well as ATS during IPL as compared to pre IPL period.

Music & Lifestyle

Age Group: 4-30 yrs

- The viewership for Music has remained unaffected whereas ATS has dropped during IPL as compared to pre IPL period. **Lifestyle has stayed unaffected.** This suggest less sensitivity of Lifestyle viewers against big ticket property such as IPL during weekdays.
- On weekends, viewership has dropped for music whereas **ATS for lifestyle is almost unaffected.**

Age Group: 31+ yrs

- Music has witnessed drop in ATS during IPL whereas **lifestyle** has stayed almost **unaffected** by IPL. Lifestyle seems to be IPL proof genre in the context of ATS.
- On weekends, older age group also witness the same pattern of drop in viewership as on weekdays, with almost same ATS indicating healthy engagement with the content.

Movies & Sports

Age Group: 4-30 yrs

- During IPL weekdays, Movies and Sports both have registered a **growth in viewership**. However, ATS for movies has gone down visibly.
- During weekends, Movies has dropped in both ATS and viewership whereas sports viewership has gone up.

Age Group: 31+ yrs

- Both the genres have registered a **growth in viewership** during IPL as compared to pre IPL period during weekdays.
- The official broadcasters of IPL were Movie and sports genre channels. However, surprisingly, they both display contrasting behaviour during IPL. On weekdays, Movies have gone down in ATS whereas sports has gone up.
- During weekends, **Movies and Sports behave inversely** as Movies registered a decline in ATS and viewership whereas sports shows positive growth in viewership and ATS is unaffected.

Note: Sony Max is included in Movies genre.

News

Age Group: 4-30 yrs

- The viewership has declined marginally during IPL **without any impact on ATS** as compared to pre IPL weeks.

Age Group: 31+ yrs

- News has dropped in viewership marginally with almost **similar ATS during IPL** as compared to pre IPL period.

Infotainment

Age Group: 4-30 yrs

- A visible drop in infotainment viewership during IPL as compared pre IPL weeks. There is no visible change in ATS in infotainment suggesting stronger engagement with the content.

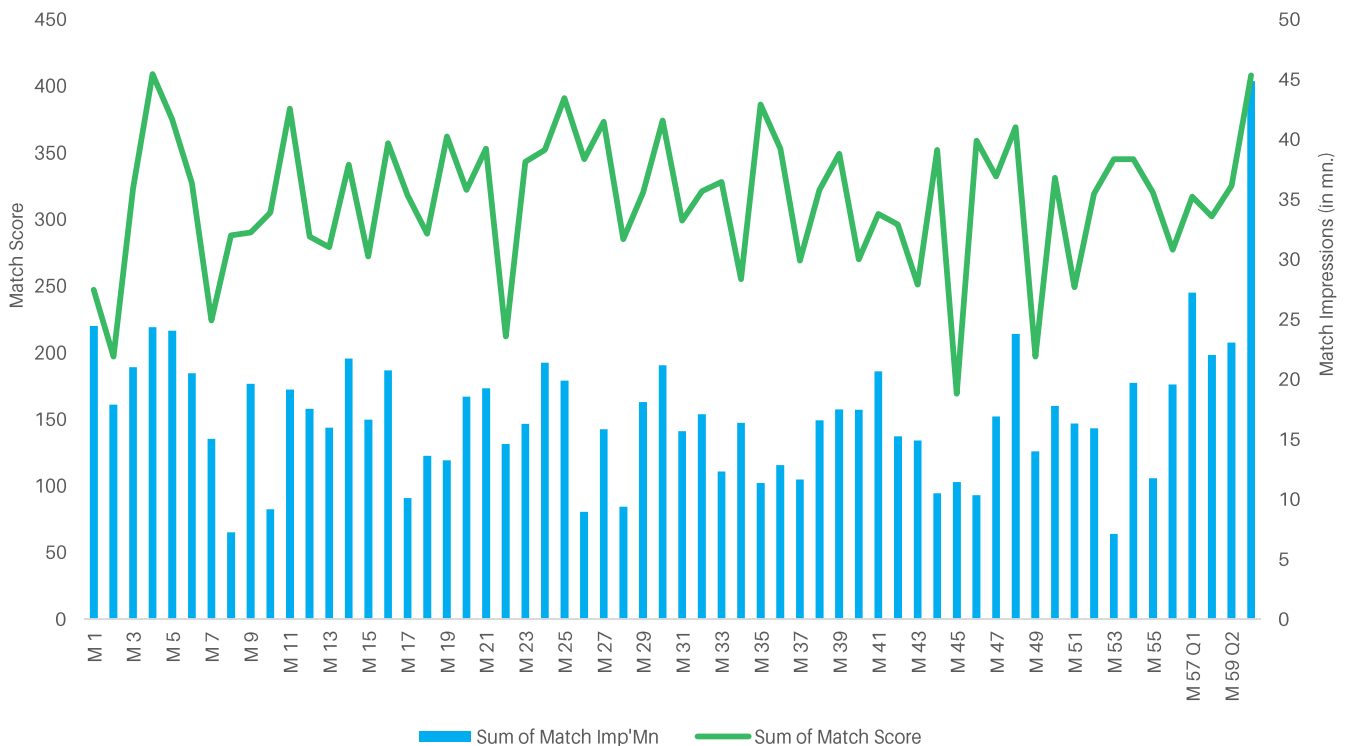
Age Group: 31+ yrs

- Drop in viewership for infotainment during IPL suggests higher interest for **'Cricketaiment'** during vacation period. There is no change in ATS.



2.c. Effect of match score on match's viewership

Match Score vs. Match viewership



Match score seems to have a positive correlation with match viewership.

Some of the notable exceptions to this are the opening matches, eliminators and finals, where the viewership has been high irrespective of match score.

2.d. Effect of Previous match result on following match's viewership

Team	Market	Avg. Imp'000 following Win (A)	Avg. Imp'000 following Loss (B)	A over B in %
Delhi Daredevils	Delhi	149	138	8%
Gujarat Lions	Guj / D&D / DNH	357	332	7%
Kings XI Punjab	Pun / Har / Cha / HP / J&K	268	210	27%
Kolkata Knight Riders	Kolkata	119	89	34%
	West Bengal	309	206	50%
Mumbai Indians	Mumbai	247	289	-15% ▼
	Mah / Goa	712	836	-15% ▼
Rising Pune Supergiants	Mah / Goa	548	561	-2% ▼
Royal Challengers Bangalore	Bangalore	110	99	11%
	Karnataka	529	419	26%
Sunrisers Hyderabad	Hyderabad	83	67	24%
	AP / Telangana	438	369	19%

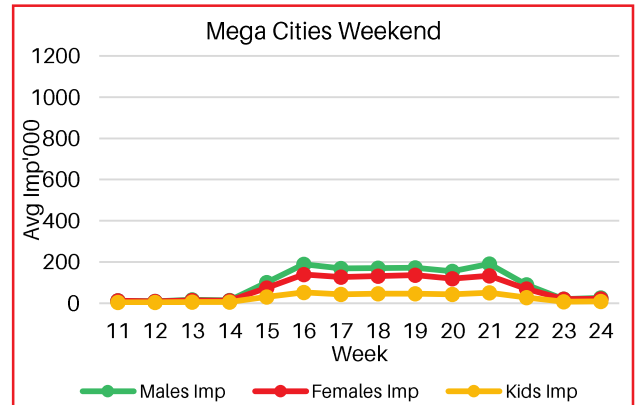
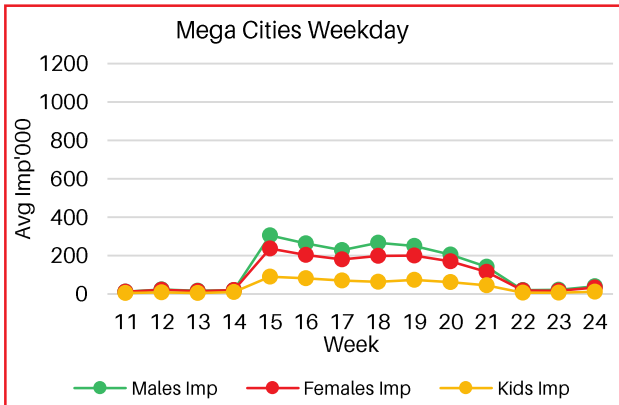
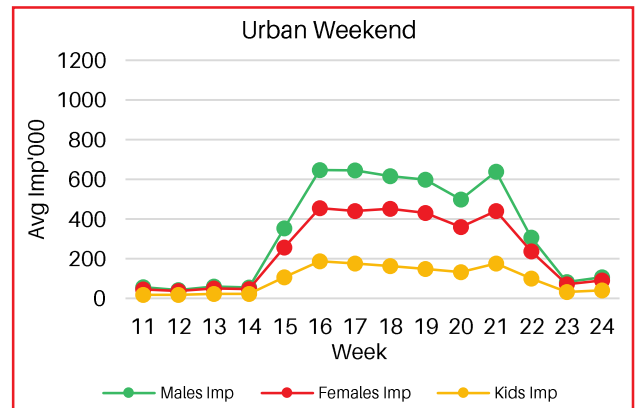
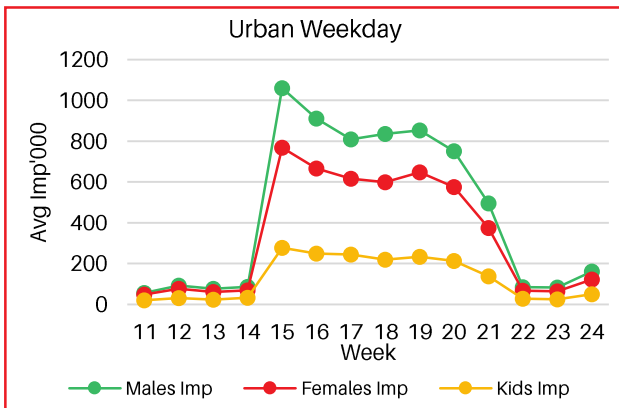
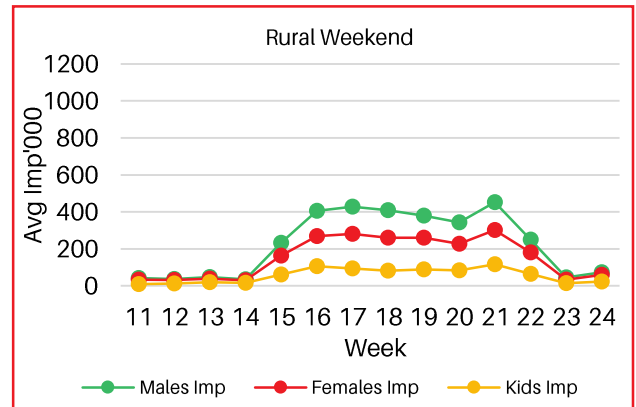
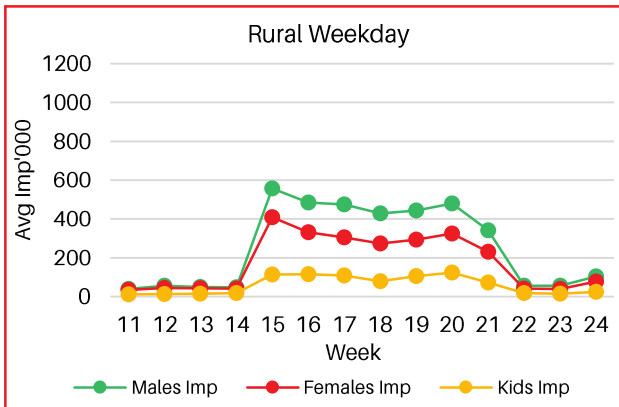


- The result of the previous match could be a **potential indicator** of the viewership of the **team's following match** in the team's home market. In most cases, the viewership of the following match increased if the team had won the previous match.
- The only **exception** to this were Mumbai and Mah/Goa markets. For both Mumbai Indians and Rising Pune Supergiants, matches following a team win see a drop in viewership. This shows that there is a cricket craze in these markets irrespective of team.

Kolkata Knight Riders saw the maximum increase in viewership following a team win.

* IPL sees higher viewership for 2000 hrs. match as opposed to 1600 hrs. match Viewership attributed to match scheduling of Prime-time airing vs. Afternoon airing or Stage in series could be a factor here.

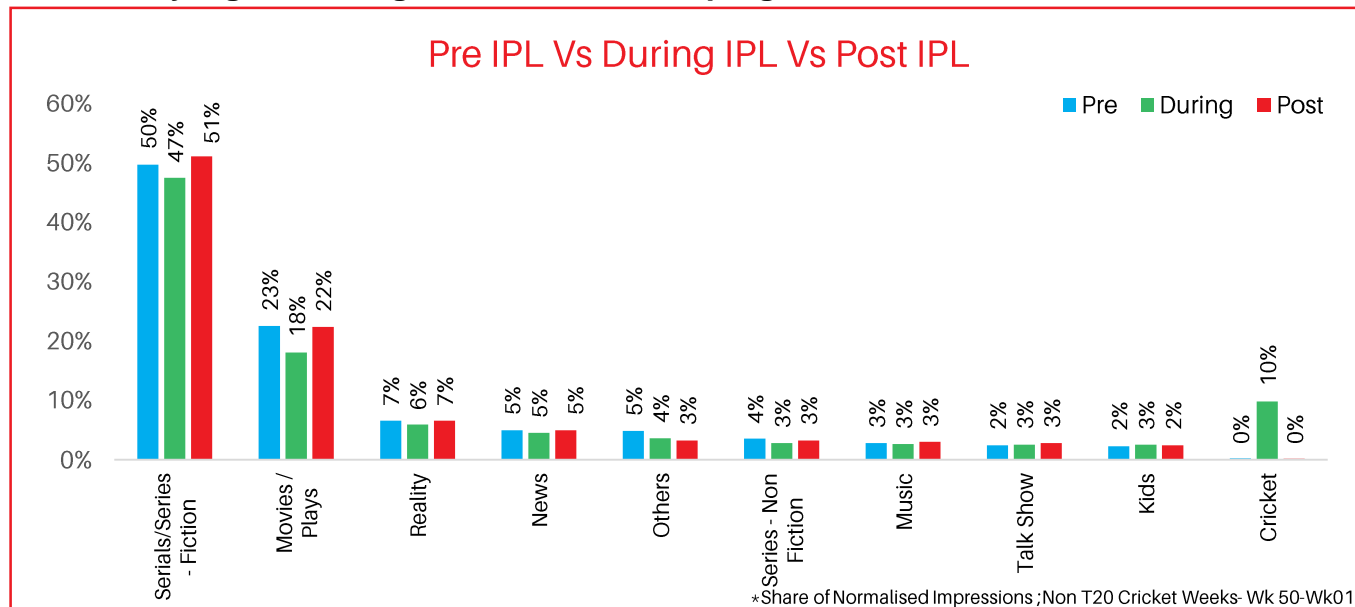
2.e. How viewership of Female vs Kids vs Male has been for IPL?



- Males are the biggest audience in terms of absolute viewership. However, weekday viewership trends remain similar across Males, Females & Kids
- Urban Markets drive the viewership for IPL, especially during weekdays
- However, on an overall level, the **viewership pattern** for Males vs. Female vs Kids across markets does **not differ significantly**. This further validates that **cricket unites India**

2.f. A Typical week after IPL in comparison with pre (Non T20 Cricket weeks) and during IPL season

Is IPL really a game changer in the context of programme theme?



- The week after IPL does not show significant and visible transformation from a typical IPL week.
- Series fiction shows growth post IPL week along with Movies. IPL being telecasted on movie channel Sony Max, Movies going up as a theme post IPL is not surprising.
- With the exception of cricket there isn't any big elasticity observed on account of IPL.

Is category behavior affected on account of IPL?

Sector	Pre	During	Post
FMCG [Fast-Moving Consumer Goods]	42%	35%	45%
Food and Beverages	23%	21%	19%
Niche Sector	5%	4%	7%
Automotive	4%	8%	6%
Consumer Durables	3%	11%	6%
Media and Entertainment	4%	4%	4%
IT and Telecom	5%	4%	2%
Fashion and Lifestyle Accessories	3%	2%	2%
Retail	4%	4%	2%
Garments and Textiles	1%	2%	2%
Construction and Real Estate	2%	2%	2%
Services	2%	1%	1%
Education	0%	1%	1%
Agriculture	0%	0%	1%
BFSI [Banking, Financial services and Insurance]	2%	1%	1%
Healthcare and Wellness	0%	0%	0%
Hotels, Hospitality and Tourism	1%	1%	0%
Diversified	0%	0%	0%
Infrastructure & Energy	0%	0%	0%

It seems that **targeting decision makers** and influencers for consumer durable and automotive is paying off to the advertisers from these categories. FMCG and Food & Beverages drop during IPL suggest that targeting housemakers during IPL may not result in desirable ROI. This could be attributed to single TV households and **fight for remote may reach its peak** during IPL season.

B

IPL in social media conversation and TV viewership

The Conversation cloud at overall IPL level:



The conversation cloud on social media suggests that **IPL final** was the biggest **driver** of the conversation perfectly indicating TV viewership (Impressions) **robustness for IPL final**.

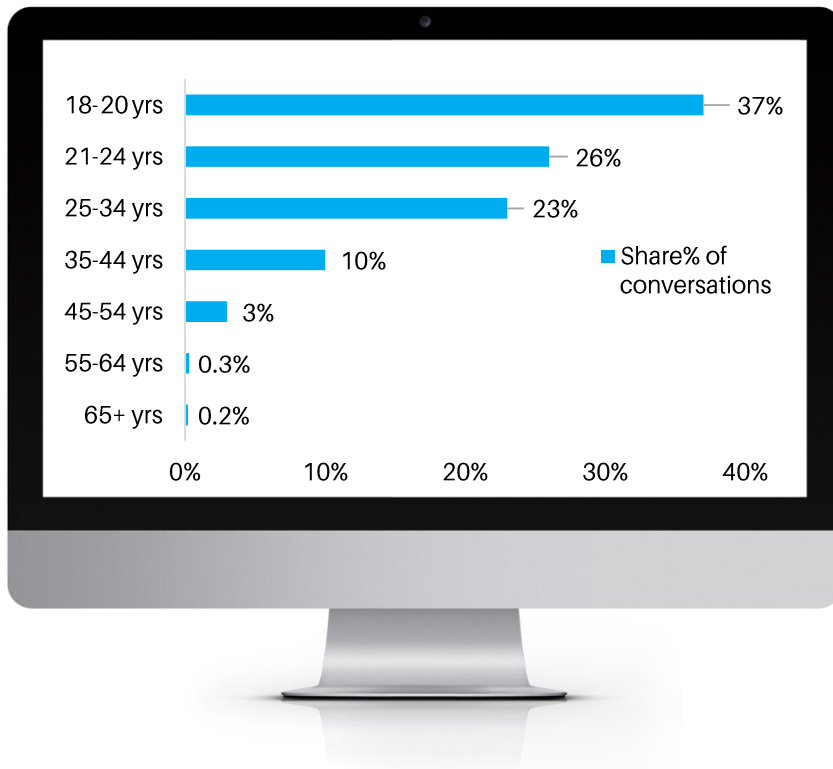
The major buzz around Royal Challenge Bangalore (RCB) on brand Virat, Gayle, AB de Villiers is a very close **reflection of TV** viewership (Impressions) for **RCB matches**. This would be more evident from subsequent analysis on impressions vs social media conversation.

Tool used: Radian6; Period: 09-Apr to 29-May; Total number of posts: 1538422

The keywords considered are only for IPL at an overall level and not team-specific.

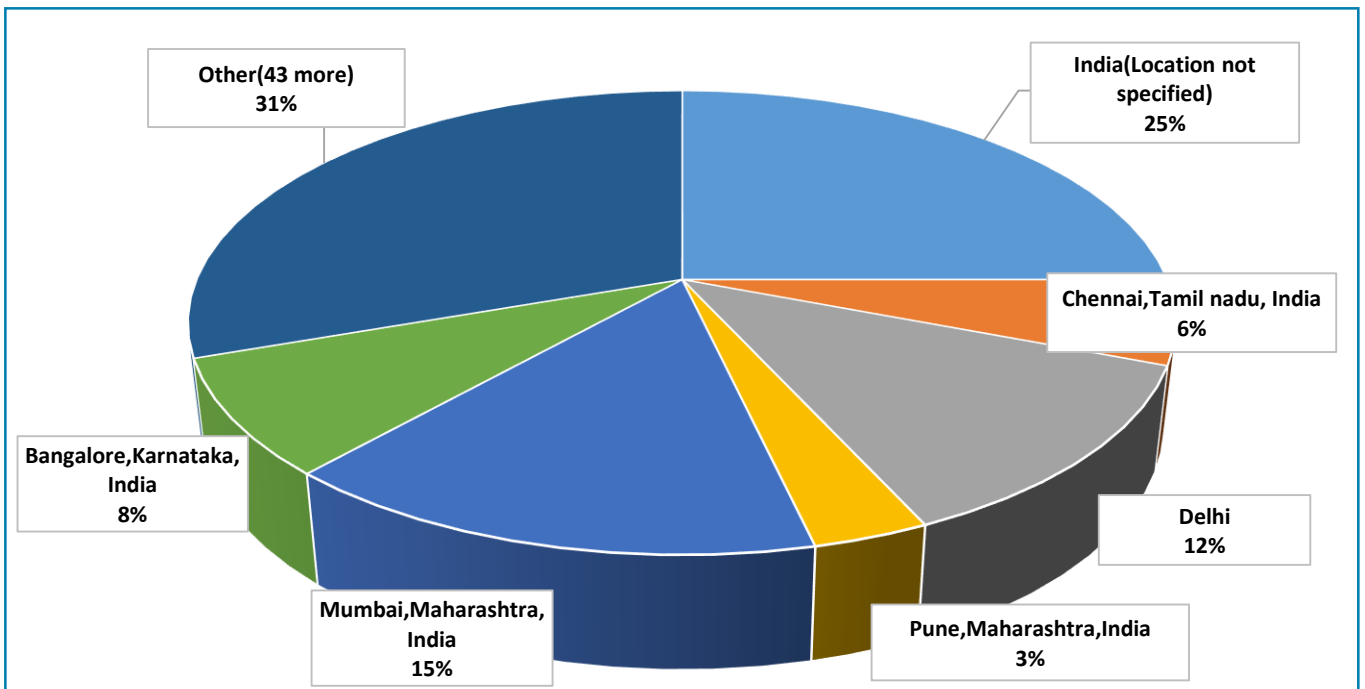
Key Words: IPL, IPL2016, IPLT20, #ipl9, #iplfinal, #vivoipl, @IPL, #ekindiahappywala

The Convergence of Demographics Conversation:

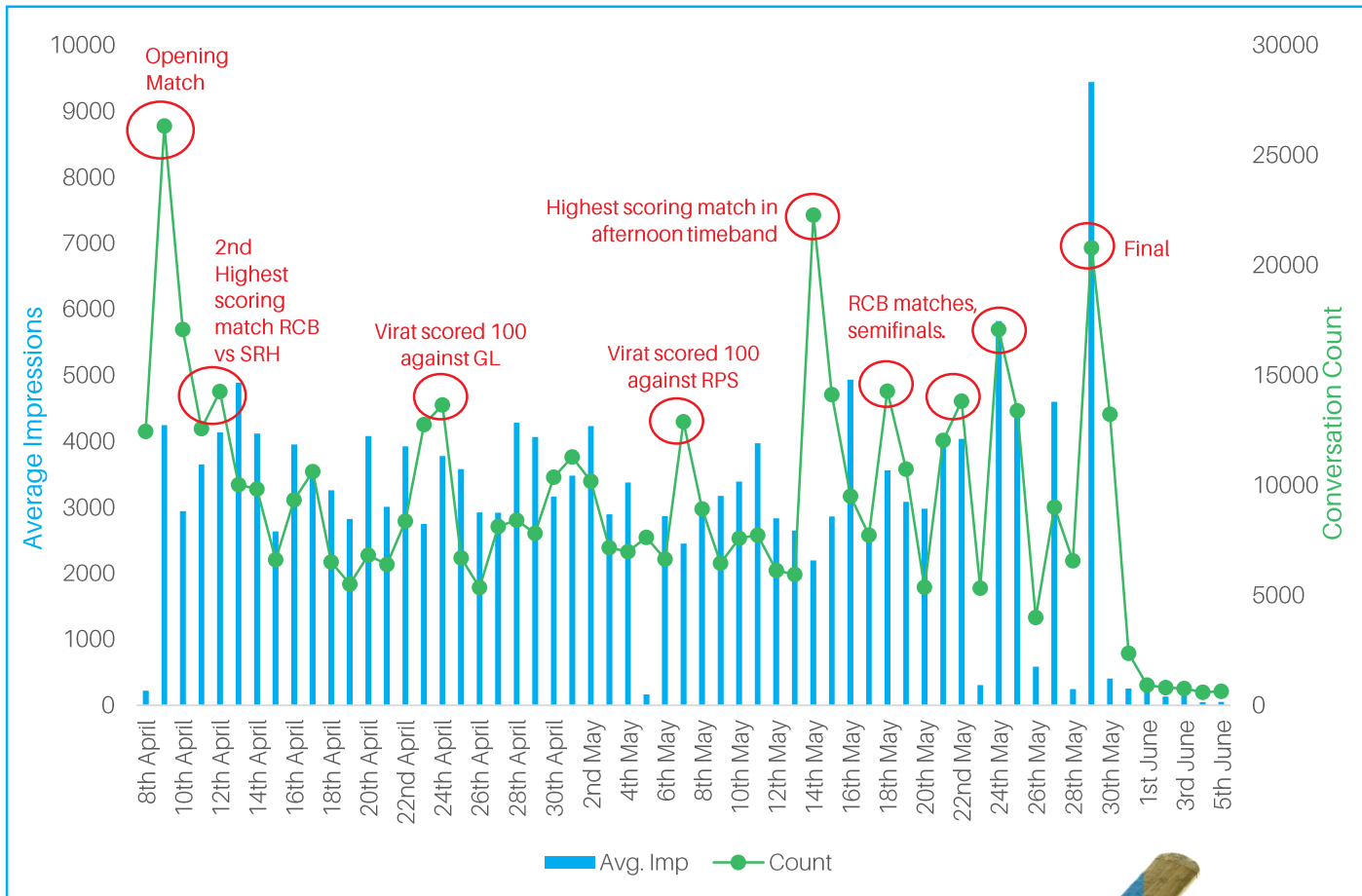


Demographics of netizen commenting on IPL is also **skewed towards younger age groups**, as analysed earlier with TV viewership data.

IPL conversation on social media is relatively much **higher** from **western zone regions** such as Mumbai and Pune that again validates the analysis from TV viewership data by market contribution mentioned in this newsletter.



The Ultimate Convergence:



Can social media and TV viewership go **hand in hand**?

TV viewership and Social Media Conversation may not always go hand-in-hand, their inter-relationship depends on popularity of TV content / property. This relationship is likely to be stronger in case of big-ticket properties on TV as opposed to regular programming.

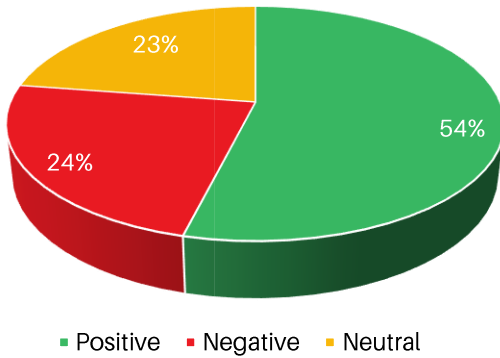
The day on day mapping of social media conversation volume and TV viewership suggests that viewership and online conversation trends run almost parallel for a property like IPL. This could be one of the potential indicator of how **TV viewership data is close to reality**.

All the major spikes are related to matches of RCB, Virat Kohli's performance, high scoring matches, etc.



Sentiment Analysis:

Sentiment Analysis



Note: Analysis of Sample tweets from Radian6 (Sample of 500+ tweets from Total volume). Key words are same as mentioned above.



@SunRisers We did it! We're the #VIVOIPL Champions of 2016. Let's celebrate Hyderabad #OrangeArmy <https://t.co/dqNQak9L5c>



No supporters, No Homeground, still we fought till end & cracked IPL 2016. Congrats guys @SunRisers Well played @RCBTweets #RCBvSRH



@TheGujaratLions .@SunRisers - Kudos to you guys! The most consistent team in this year's #IPL are the Champions. Congratulations #OrangeArmy. #RCBvSRH



RCB fan I must say.. Over Confident deserves this type of results.. they dont as strong as SRH.. #IPLfinal #RCBvSRH CHAMPION SRH



However hard u fought till final, goes to vain if u lose in race of title.. #Kohli #RCBvSRH #IPLfinal #IPL2016



One LOVELY thing about #IPL2016 coming to an end..... you dont have to suffer the idiocy and inanity of @sherryontopp #Blessing



RCB fan I must say.. Over Confident deserves this type of results.. they dont as strong as SRH.. #IPLfinal #RCBvSRH CHAMPION SRH



@IPL Final. It's all over! Sunrisers Hyderabad won by 8 runs <https://t.co/Bq7kJZSw31> #RCBvSRH



The only non Indian captain lifts the Indian Premier League #IPLFinal #IPL2016



IPL from elementary data science angle

So far the IPL analysis has been done with simple evaluation of data without it being subject to any statistical test or data operations. This is not an attempt to challenge any established analysis on IPL across marketing and communication community. The attempt made here is to give a chance to data science driven insights with the help of elementary statistics.



The relationship between IPL and major TV channel genre

The critical question that we are attempting to answer here is the relationship between IPL and GEC, News, Kids and Movies. How strong is this relationship from statistical perspective? To answer this question, we have used correlation coefficient analysis in excel to understand the strength of this relationship.

IPL viewership correlation with major genre during primetime matches (2000-2330 hrs.)

	GEC	News	Movies	Kids
All India 4+	-0.355	-0.543	0.911	0.040
Urban 4+	-0.483	-0.569	0.918	-0.103
Rural 4+	-0.254	-0.376	0.876	0.168
HSM 4+	-0.309	-0.586	0.930	-0.014
South 4+	-0.271	-0.331	-0.480	0.189

Note: Correlation coefficient oscillates between +1 and -1. The positive 1 (+1) indicates strong positive correlation whereas negative 1 (-1) indicates strong negative correlation. We have set the threshold of ± 0.5 for any noticeable correlation.

*Sony Max is included in movies.

Formula

$$r = \frac{N\sum xy - (\sum x)(\sum y)}{\sqrt{[N\sum x^2 - (\sum x)^2][N\sum y^2 - (\sum y)^2]}}$$

x= The first variable for correlation pair (IPL in this case)
Y= The second variable for correlation pair (GEC, News, Movies and Kids in this case)

N= Number of observations/data points pair of variables (66 days' data points from 1st April – 5th June considering pre IPL and post IPL period as well)

r = Pearson Product – moment correlation coefficient



Observation:

- GEC seems to be **weak in relationship with IPL** across most markets with the exception of Urban market.
- News as a genre has a **significantly negative** relationship with IPL except in case of Rural India and Southern markets.
- Movies as a genre seems to be very **close to perfect positive relationship** with IPL viewership. This could be due to the fact that it includes 'Sony MAX' which broadcast the IPL matches. This is further validated by the fact that the relationship is **not as strong** with the **Southern movie channels**
- **Kids genre** appears to be the **least affected** or insensitive genre. It does not show any noticeable relationship with IPL viewership data.

Summary

- T20 cricket tournaments do not appear to be **SIGNIFICANTLY DIFFERENT** from each other on TV in the context of **CATEGORIES** that advertised.
- Unlike popular perception of **WOMEN VIEWERSHIP** being higher for IPL, it **DOES NOT** show any skew towards Female audiences in comparison to other T20 cricket tournaments.
- The age profile of IPL viewers differs from other series. **KIDS AND YOUTH** constitute marginally higher share of IPL viewership in comparison to Asia Cup and ICC World T20.
- Surprisingly, zone pie for IPL remains constant with western India contributing **1/3rd of IPL** viewership despite having three IPL teams.
- IPL match score seems to have a positive correlation with match viewership.
- In IPL, the viewership of the **FOLLOWING MATCH INCREASED** if the team had won the **PREVIOUS MATCH**. The only exception to this was Mumbai and Mah/Goa market. This shows that there is a cricket craze in these markets irrespective of team.
- If ATS is taken as **PROOF OF ENGAGEMENT** then **GEC** remains **UNAFFECTED** on weekdays and **NEWS** across all days during IPL. This could indicate higher loyalty towards GEC and News content.
- **LIFESTYLE** is one special genre that is **IPL PROOF**. The younger viewers of lifestyle do not get affected by IPL season on TV in the context of **ATS**.
- Biggest **DRIVERS OF SOCIAL MEDIA** conversation volume are **IPL FINAL** and **RCB** matches. It is also **CONVERGING** with the **TV** viewership in the context of high scoring matches and Virat Kohli's performance.
- TV viewership data of IPL seemingly converges with social media volume of conversation, a proof of how **REALISTIC** data on **TV VIEWERSHIP** can be.





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