

Abstract

Research question: Research of new sport teams has maintained a narrow focus on season ticket holders. This is redressed in this study by determining whether immediate preferences toward new local teams can be observed in the broader viewing behavior of the general population within local markets. The consumption of new sport teams is then tracked longitudinally to understand the influence of consumer novelty on market behavior.

Research methods: The study analyzed television ratings data of a new Australian cricket league. The period of analysis spanned five seasons from 2013/2014 through to 2017/2018. Data analysis included independent samples *t* tests and hierarchical linear modelling.

Results and findings: Each local market exhibited an immediate preference for their local team. Local viewing preference for local teams did not grow over time, with the relative audience of local and non-local team fixtures increasing proportionally over the period. The league appears to be towards the end of its novelty phase, evidenced by a stabilization in viewing commitment yet retraction in base audience size between season three and five.

Implications: The ability of new teams to solicit immediate local viewing preferences within the general population confirms the salience of geography as a foundational component of team identity. New teams should strategically consider their alignment to a suburban, city, state, or regional identity. That preference towards local teams did not increase within local markets reflects a critical theoretic distinction from more identified fan segments in which connection to team is thought to typically grow over time.

Consumer Behavior toward a New League and Teams: Television Audiences as a Measure of Market Acceptance

Since the inception of the T20 format in 2003, the shortest version of the game has evolved from an experimental novelty to a substantial part of the international cricket calendar. In the process, it has driven the revitalization of a sport that had shown signs of stagnation (Kitchin, 2008). This revitalization has centered on harnessing T20 cricket as a new sport product targeted toward new and weakly attached fans (Paton & Cooke, 2011). T20 leagues, therefore, provide an ideal setting to research sport consumer behavior toward new sport products, given they involve the formation of many new teams at such a commercial scale to allow for the exploration of the broader market response to their creation.

The Big Bash League (BBL), on which we focus in this article, was introduced to Australia's crowded sport marketplace in the 2011/2012 season. Significantly, the leagues' strategic shift to national free-to-air (FTA) television coverage during the 2013/2014 season affords an opportunity to extend current understanding of consumer behavior in relation to new and relatively embryonic sport products through the use of a novel dataset to examine two theoretical problems. Consumer connections and identification with new teams have been studied extensively over the last 20 years (James, Kolbe, & Trail, 2002; Katz & Heere, 2016; Lock, Darcy, & Taylor, 2009; Lock, Taylor, & Darcy, 2011; Lock, Taylor, Funk, & Darcy, 2012; Lock, Funk, Doyle, & McDonald, 2014). This work, however, has typically explored the behavior of *season ticket holders* (STH) or regular attendees, to draw conclusions about "consumers" of new teams, broadly. From a methodological perspective, this cohort represents a logical focus of analysis given their direct consumption; however, they are only a small segment of a new team's consumers. As noted by Tainsky and Jasielec (2014): "the singular focus on attendance limits our understanding of fandom given the

breadth of consumption choices” (p. 94). To advance previous work, the present study uses television ratings data to further our understanding of market consumption towards relatively new leagues and their teams. In doing so, the study responds to Kunkel, Funk, & King’s (2014) call to address a deficiency in league-level marketing research.

The combination of the BBL context and market-level methodological approach allow for the examination of two theoretical problems. First, we draw on social identity complexity research (Heere & James, 2007; Lock & Funk, 2016; Roccas & Brewer, 2002) to examine the extent to which existing group memberships create consumption biases in television viewership markets. This provides a basis to discern whether initial consumption of recent teams is premised on cognitive biases made salient by a community or city identity. In doing so, we retest previous findings from cross-sectional studies that suggest the community in which a team is situated plays a powerful role in the consumer identity development process (e.g., Heere, Walker, Yoshida, Ko, Jordan, & James, 2011; Kolbe & James, 2000; Lock et al., 2011). In replacing the previous T20 competition (2005-2011) which was aligned to traditional state-based structures with the new city-based franchises, Cricket Australia realigned the cues it provided about the group identities surrounding BBL teams. It did so by distancing the BBL from cricket’s (traditional) sport identity to target new consumers (Cricket Australia, 2011). Instead, the organization took steps to emphasize each team’s geographic identity. As such, the BBL offers a prime context to examine whether geographic identity creates biases in market-level viewership patterns for new teams.

Second, the response of markets to sport product launches is unclear. Consumers seek out new and different experiences in accordance with novelty seeking behavior (Hirschman, 1980) and according to some previous research, consumers of new sport leagues conform to this phenomenon (Mahony, Nakazawa, Funk, James, & Gladden, 2002). Conversely, research from the marketing domain that has explored market and brand performance metrics

advances the antithesis: that new repeat-purchase consumer products display “near-instant loyalty” and behave like established brands within the short term (Ehrenberg & Goodhardt, 2000). Accordingly, new buyers, once buying, make the brand a habitual part of their ongoing repertoire (Trinh, Romaniuk, & Tanusondjaja, 2016). It is particularly vital to understand consumer behavior toward new leagues and teams, such as the BBL, as sport markets become increasingly crowded and competitive (Byon, Zhang, & Connaughton, 2010). By analyzing television audience data over the five seasons the league has been exposed to a national audience, we specifically explore two contrasting explanatory theories surrounding the consumer adoption of new sport products: novelty seeking and near-instant loyalty hypotheses of market behavior. This extends upon extant theory on the durability of interest in new teams.

Literature Review

External Group Identities and New Sport Teams

A major question facing consumer researchers and sport marketers is why consumers develop preferences for specific teams. Responses to this question are vast and clearly elucidate the importance of vicarious achievement (Cialdini, Borden, Thorne, & Walker, 1976; Trail et al., 2012); domain involvement (e.g., Fisher & Wakefield, 1997; Kahle, Kambara, & Rose, 1996; Lock et al., 2011; Funk, Mahony, & Ridinger, 2002); tradition and community (Heere, Walker, et al., 2011; Jones, 2000; Kolbe & James, 2000); and socialization (James, 2001) in the development of consumer preferences. Each of these factors has been analyzed from a social identity perspective to some extent (cf. Tajfel & Turner, 1979). The central point of social identity theorizing is that groups are important social frames of reference helping individuals to make sense of their self in relation to other people and groups (Turner & Reynolds, 2008). Furthermore, group identification creates cognitive biases that, when salient, lead members to display preferences for their own group

at the expense of others (Turner, Oakes, Haslam, & McGarty, 1994). This underscores why consumer researchers have used the social identity approach to make sense of the biases and consumption patterns fans demonstrate toward their own team (Lock & Heere, 2017). We use this strand of social identity theorizing to make sense of in-group favoritism in relation to a specific group identity.

In early social identity theorizing, Tajfel (1982) alluded to the emotional value of group membership. That is, identities that are internalized and self-important to an individual play a crucial role in self-definition and behavior (Lock & Heere, 2017). Perhaps because of this observation, sport consumer researchers have tended to concentrate on studying identified fans in order to understand the motives and behaviors of the most committed supporters as a proxy to understand all team consumers (Park, Mahoney, & Kim, 2011). Yet, as Smith and Stewart (2010) have noted, “while ‘die-hard’ and passionate fans are obviously an appealing cohort to examine, the elucidation of their motivations and behaviors provides an imbalanced picture of sport consumption. . . . Sport consumers are not all passionate and fanatical” (2010, p. 5). While it is widely accepted that sport fandom exists along a continuum from *casual spectators* through to *die-hard fans* (Funk & James, 2001; Trail, Robinson, Dick, & Gillentine, 2003), it is not mutually inclusive that a casual spectator must identify with a team. In reference to casual spectators, Bernache-Assollant, Laurin, and Bodet (2012) noted that team “identity is only a peripheral component of their self-concept” (p. 123). In this regard, we retain a weak understanding of the behaviors of weakly identified or non-identified consumers. Contributing to our poor understanding of these two distinct groups, as recently critiqued by James, Delia and Wann (2019), is that they that have been largely conflated within survey measurement and model development.

A further challenge has been an evident focus on the facets of teams that lead consumers to identify, rather than more expansive theoretical positions that take account of

the associated groups and communities that interrelate with team identities (Heere & James, 2007; Heere, Walker, et al., 2011). This ignores work on social identity complexity, which states that a person's social self-concept is formed of a repertoire of groups upon which the individual places significance (Roccas & Brewer, 2002). The work on social identity complexity demonstrates that sport teams can be both a direct source of group identity and a symbolic representation of other communities (Heere & James, 2007). Such thinking is well established in sport management, although scantily tested empirically (Heere, James, Yoshida, & Scremin, 2011).

The relationship between sport teams and other groups has received some attention, albeit in relative small-sample studies. Kolbe and James (2000) conducted a quantitative study of motives leading to attachment for Cleveland Browns STH. They found that attachment to city and community had the strongest influence on team attachment. Similarly, Jones (2000) conducted a qualitative investigation of fan identification toward Luton Town Football Club, finding that broader identification with Luton as a community was a formative driver. More recently, Uhlman and Trail (2012) indirectly reached a similar conclusion in developing and testing a model of fan superiority. Utilizing the case of the Seattle Sounders, a new team with immediately strong local fan support, Uhlman and Trail found that attachment to the Seattle community itself was the strongest predictor of team identification amongst STH. Their study however was limited to a small sample ($N = 328$) of highly identified group of STH fans.

Within traditional models of fan development, television viewership has retained a relatively low status in the hierarchy of expressed fan consumption (Tainsky & Jasielec, 2014). Correspondingly, while behavioral preferences toward local teams have been consistently observed in patterns of sport television consumption (Noll, 2007; Mills, Mondello, Tainsky, 2010; Tainsky & Jasielec, 2014), the implications of such a relationship

upon team identification have been underdeveloped for two particular reasons. Firstly, this reflects that the analysis of television viewership data has primarily occurred from an econometric perspective, corresponding to the *Journal of Sports Economics*' leading contribution to the domain (Feddersen, & Rott, 2011; Tainsky, 2010; Tainsky & McEvoy, 2012). Such econometric studies of broadcast consumption have more typically focused on overall determinants of demand (Artero, & Bandrés, 2018; Baimbridge, Cameron, & Dawson, 1996), rather than individual managerial issues, with perhaps the most notable exception being outcome uncertainty research (Alavy, Gaskell, Leach, & Szymanski, 2010; Buraimo & Simons, 2009; Forrest, Simmons, & Buraimo, 2005).

Secondly as brought into sharp focus by the recent study by Karg, McDonald and Leckie (2019), traditional models of sport consumption within sport management and marketing literature have placed repeat and consistent attendance at the end point of the consumption spectrum. The authors note: "the bulk of existing work on sport fandom maintains a high importance on live attendance or physical participation as the ultimate expression of fandom" (p. 313). Correspondingly, media consumption has been considered an antecedent stage of fan development (Pritchard & Funk, 2006). Yet the research by Karg and colleagues in the Australian context illustrated not only that 'media-dominant' consumers outnumbered 'event dominant' by a ratio of ten to one, but that their difference in channel preference was not reflective of significant differences in underlying avidity. Scholarly understanding of media consumption from a fan development perspective therefore remains comparatively nascent (Karg et al., 2019).

Although it appears universal and elementary that local teams generate larger local audiences, the potential significance of this observation to team identification has perhaps yet to be fully embraced. Tainsky and Jaiselec's (2014) confirmation of local team viewing preferences in relation to community identification epitomizes the potential significance

found within this simple observation: “While this is anything but a surprising result to researchers of sport, it is nonetheless meaningful to reflect on the role of local community in fandom, especially as our quantity of sport entertainment options grow” (p. 104). The influence of identity with broadcast viewership was also evident in the analysis of domestic migration and television viewership by Tainksy and Stodolska (2010). Here, the researchers illustrated a significant preference toward telecasts of matches played at the former home-team venue: “It was more than the game itself that some fans tuned in to watch. As pictures of the city landscape, the stadium, and the crowd infuse telecasts in between plays and on either side of commercial breaks...these may add value to fans and potentially influence the decision of some fans to tune in” (p. 811). Linkage between television consumption and social identity is also apparent in individual sports, with Konjer, Meier and Wedeking (2017) illustrating German tennis players to attract audiences 50% bigger than matches featuring non-Germans.

While it is unsurprising that local teams generate higher local viewing audiences in established leagues, whether such phenomenon occurs from the inception of a competition is unknown. It has been shown that individuals can develop deep psychological connections with new sport products/teams before they have physically entered the market or played a match (James et al., 2002; Kunkel, Doyle, Funk, Du, & McDonald, 2016) and such connections should lead to a corresponding viewing preference. However, such individuals represent a small group of highly attached fans which represent only a fraction of the overall market. Given existing research has focused near exclusively on highly engaged fans, exploring whether the theorized behaviors associated with social identity theory can be seen in a broader sport consumption setting represents a significant test of the boundary conditions of the theory’s generalizability in a sport context (Busse, Kach, & Wagner, 2017).

At the market level, where most consumers may know little about a new team, external group identities such as geographic connection could potentially be most impactful upon team identity during the formative years of new teams. In contrast, if the market does not perceive a genuine connection between a new team and its geographical region, there may be little reason to exhibit a viewing preference toward a local team compared to non-local teams. This was feasible in the context of the BBL competition, given the league was designed and conceived entirely through market research consultancy rather than community driven initiatives. Notably, consumers were unlikely to carry forward existing connections from the previous competition with respect to team performance. The previous KFC T20 league saw weak competitive balance in which Victoria and New South Wales won five of six tournaments and reached the final in eight of the twelve possible occasions. However these States were each allocated two local franchises in the new competition, ensuring that previous success could not to be attributed with a particular franchise. Furthermore, work by Sung, Mills and Mondello (2019) determined there to be little evidence that prior year performance is a strong indicator of current season viewership. With such considerations in mind, we hypothesize that the presence of geographic group identity will result in local viewers showing an immediate viewing preference for local teams, despite such teams having an embryonic team identity.

H₁: Teams will have significantly higher television audiences in their home city than teams from other markets in the first season of free-to-air broadcast.

Extending upon this initial hypothesis, we consider whether the viewing preferences of fans toward their local team changes longitudinally. Whether home cities exhibit an instantaneous viewing preference for their local teams, it would appear intuitive that new sport teams develop loyalty and preference among their fans over time (Funk & James, 2006; Mahony et al., 2002; Olson & Jacoby, 1971). Connection to a team may therefore grow

iteratively through direct experiences, consistent with theories of escalating commitment (James et al., 2002; Mullin, Hardy, & Sutton, 1993). It is noteworthy that escalating commitment is a behavioral manifestation of fandom (Lock et al., 2012). Previous research has confirmed that fans can exhibit psychological connections to teams in the absence of game experiences (James et al., 2002). These connections can often commence from a strong starting point and remain stable even during extended periods of poor performance (Lock, Funk, Doyle, & McDonald, 2014). We therefore hypothesize that viewer preference toward local teams should increase over time, given that time allows such teams to develop their identity within their market.

H₂: Consumer preference towards local teams will increase over time.

New Sport Leagues: Consumer Novelty or Stability?

Understanding team identification and consumer preference ought to be a key objective for those establishing new sport leagues and teams. However, the behavioral response of consumers toward new products remains contested. According to Hirschman (1980), consumer preference towards new products is said to be impacted by novelty seeking behavior, reflecting an inherent human desire to seek out the new and different. The influence of novelty in the context of consumer behavior has been extensively examined (Baumgartner & Steenkamp, 1996; Hansen, 1972; Manning, Bearden, & Madden, 1995; Sheth, Newman, & Gross, 1991). Sheth, Newman, and Gross (1991) argue that novelty is encapsulated in the *epistemic value* of a product: “the perceived utility acquired from an alternative’s capacity to arouse curiosity, provide novelty, and/or satisfy a desire” (p. 162). As consumers strive to optimize their stimulation and arousal (Berlyne, 1960), the novelty effect results in a pattern of increased initial interest toward new products followed by a corresponding reduction due to inherent novelty seeking behavior external to the product itself.

There has been limited exploration of novelty in a sport context as a method of understanding behavioral patterns (Park et al., 2011). Research surrounding the novelty effect in sport thus far has appeared more conclusive in relation to the effect of superstar athletes (Shapiro, DeSchrive, & Rascher, 2017; Jewell, 2017; Lawson, Sheehan, & Stephenson, 2008). Shapiro et al. (2017) for instance determined that the novelty effect of David Beckham's signing to Major League Soccer (MLS) was largely confined to the first of his six seasons. In relation to the introduction of new leagues, Mahony et al. (2002) noted that many consumers view new leagues as a novelty in early years, allowing for exploratory interest and experimental consumption. However, once this novelty period fades, more sophisticated marketing strategies are necessary in order to maintain—and hopefully grow—the fan–team relationship. This line of reasoning appears to be supported by some, albeit comparatively limited, empirical sport case studies. The establishment of the first professional soccer league in Japan in 1993 (J-League) was followed, in its third year, with an average attendance of 19,679—a number that has not been exceeded since (Nakazawa, Mahony, Funk, & Hirakawa, 1999). Crucially, there was a substantial, unexpected decline in Year 4, after which modest attendances became normative. Additionally, boosted by hosting the 1994 FIFA World Cup, America's National Professional Soccer League experienced a similar trend of immediate interest followed by a period of subdued interest thereafter (Collins, 2006; Trecker, 1998).

The impact of novelty upon new product consumption however remains contested within consumer behavior research. Ehrenberg, Uncles, and Goodhart (2004) articulate the contention that surrounds new products: “the general view for new brands is that loyalty grows slowly . . . but no generalizable results of this have been reported” (p.1314). In line with this observation, Wright and Sharp (2001) found that new brands behaved like existing brands quickly, within 6 to 8 weeks of market entrance. Ehrenberg and Goodhart's (2000) study determined that new brands exhibit “normal” levels of consumer purchase rates

virtually from inception. Similar findings were reported in other studies of consumer behavior (Hoek, Kearns, & Wilkinson, 2003; Wellan & Ehrenberg, 1988). Notably, these predictable consumption patterns have also been found to hold true in the context of television viewing behaviors, despite the comparative low barriers to purchase/consumption (Barwise & Ehrenberg, 1988).

That consumption behavior of new products in fact normalizes quickly is underpinned by the premise that buyers of new brands are still likely to be experienced buyers of the product category, and so the event of buying a new brand is unlikely to be a radical departure from existing behavior (Trinh, Romaniuk, & Tanusondjaja, 2016). Given recent studies have begun to confirm that sport markets conform to consistent consumer behavior patterns and generalizations as predicted by Dirichlet market analysis consumer modelling (Baker, McDonald, & Funk, 2016; Author, 2018), it would appear plausible that the BBL competition would not experience the effects of consumer novelty. Correspondingly, it is proposed that:

H₃: BBL television viewership exhibits longitudinally stable patterns of consumption.

The literature reviewed demonstrates three substantial gaps that exist in the underlying research on new sport teams and leagues. Firstly, due to the focus on attendees (and often STH) as the target population within the much of new team research, there is an opportunity to analyze market-level data to develop understanding of consumer behavior towards new teams and leagues on a broader-level. In contrast to existing STH research, this study evaluates behavioral preferences among perhaps the broadest group of consumers, television viewers, who represent a melting pot of low loyalty, high loyalty and even non-fans. Secondly, despite the nascence of a new team's identity, there has been limited empirical testing of the extent that external group identities influence consumer television consumption preferences specifically in the context of new teams. Thirdly, there appears a lack of consensus as to the effect of novelty on fan interest within new leagues. While some

empirical examples suggest a novelty effect (Mahony et al., 2002), findings in marketing are equivocal (Ehrenberg et al., 2004). We seek to provide a test of consumer television preferences to add to current knowledge of the novelty effect in relation to new sport teams.

Method and Empirical Specifications

Research Context

The BBL was launched in 2011 in response to a global cricket trend surrounding declining levels of fan interest and engagement with the sport, particularly among youth and families (Paton & Cooke, 2011). A pre-cursor to the BBL was the KFC Twenty20 Big Bash, which CA operated for a period of six seasons prior. Notably, this league was state-based, featuring six preexisting teams that competed at the highest level of Australian domestic cricket since 1892/1893. The launch of the BBL however, saw a re-positioning of the league, resulting in new names, colours and mascots, with the BBL now representing the entry point for exposing non-traditional fans and children to cricket in Australia (Cricket Australia, 2015).

The period of analysis spanned five BBL seasons from 2013/2014 through to 2017/2018. These constitute Seasons 3 through 7 of the BBL tournament in which saw all BBL matches on FTA television throughout Australia as part of an AU\$100 million-per-year broadcast contract (Cricket Australia, 2015). Prior to this, the first two seasons were telecast on pay television, which has a subscription rate across Australia of around 30%, with sport channel subscribers only a sub-group therein (OzTAM, 2013). The prior competition was similarly broadcast exclusively on pay television. Two considerations preclude Season 1 and 2 and the prior competition from inclusion within this study's analysis. First, as subscription television ratings are reported as an aggregated national rating, they are unable to be dissected to illuminate the audience contribution of individual regions as desired by Hypothesis 1 and 2. Secondly, subscription audiences are considerably more likely to be

sport fans given that sport content is a primary driver of subscription television. The first season of national coverage on FTA television provided the league its first exposure to national audiences who may not have had previous exposure to the league or the sport as had been identified within the sports marketing plan (Cricket Australia, 2011). Given the desire to measure market response at a broader consumer level, the new national distribution channel utilized to broadcast Seasons 3 to 7 provided a representative sample of the Australian population not achieved during Seasons 1 and 2. Reference to market responses to these relatively new BBL teams is therefore within the context of this new national distribution channel, which commenced in Season 3. Season 1 within the results and discussion refers to the first season of FTA coverage from hereon given this exclusion.

Data Source and Type

The study utilized television ratings data collected by research agency OzTAM, the industry-standard aggregator of television ratings data across Australia's major metropolitan cities. OzTAM adopts a ratings measurement methodology equivalent to Nielsen ratings data, which has formed the basis of much broadcast ratings scholarship in a North American context (Sung et al., 2019; Tainsky, 2010). The organization has a sample of approximately 3,150 households comprised of 8,280 individuals, distributed across the five capital cities of mainland Australia (OzTAM, 2015, 2016). Seven of eight BBL teams reside within these five capital metropolitan cities, with the exception being the Hurricanes who are based in the regional city of Hobart.

A brief description of the metrics utilized within this analysis is provided here. First, the "average" audience provides a measure of the size of the audience during the entirety of a program. The average audience provides the most valid measure of the absolute popularity of a program and, correspondingly, is the most widely publicly reported viewership metric. Second, "reach" captures "the number of unique viewers who have seen at least one minute

of an event or time band across its total duration” (OzTAM, 2010, p. 3). This figure can be used as a proxy for the maximum possible audience, given that it includes people who may have only watched a small part of a program. Lastly, “viewer duration” measures the average amount of the telecast minutes watched per viewer, measuring audience commitment to the telecast. This can provide insight into whether an audience is composed of a small concentration of loyal viewers or many light viewers who watch only a portion of the program.

Data Analysis

In order to perform the analysis required of this study, transformations were performed on the raw ratings data. Broadcasters divide standard T20 cricket telecasts into two distinct sessions; however, in keeping with the goals of this research the sessions were combined to reflect the overall match audience. This was calculated as follows: Session duration (SD) was divided by total match duration (MD) to calculate the contribution of each innings to the total broadcast. This share percentage was then applied against each session’s average audience (AUD) to create a valid weighted average viewership for the entirety of the match (WAV). This formula is illustrated in Equation 1.

$$(SD1/MD \times AUD1) + (SD2/MD \times AUD2) = WAV \quad (1)$$

In respect to reach figures, the larger of the two innings was utilized as the overall program reach in the study. While that represents a limitation of the dataset, any underreporting should be consistent across regions and therefore not impact the underlying purpose of the analysis. Finals matches were also excluded to allow for more valid longitudinal comparisons (i.e., finals matches did not include all teams and, more importantly, create abnormal peaks of interest within related geographical regions).

Model

Independent samples *t* tests were performed to ascertain whether fans' 'behavioral team preference' could be observed as a measure in the ratings from Season 1. A hierarchical linear model (HLM) was then fitted to test the latent strength of behavioral preference among BBL television audiences over time across regions. HLM is appropriate because local audiences are nested within regions, with the method overcoming limitations of conventional regression in such circumstances surrounding correlated error terms and biased estimates of parameter standard errors (Raudenbush & Bryk, 2002). HLM resolves these problems through the use of interdependent regression equations estimated simultaneously and has previously been embraced in a sport context to evaluate players within teams (Koschmann, 2019; Todd, Crook, & Barilla, 2005), health by government quality (Wicker and Downard, 2017) and volunteering engagement (Wicker & Hallman, 2013).

A review of previous broadcast demand studies (Scelles, 2017; Tainsky, 2010; Tainsky & McEvoy, 2012, Tainsky & Jasiolec, 2014) formed the starting basis upon which to consider variables for inclusion in the model. Following this review the specific characteristics of the BBL competition were considered, resulting in the exclusion of several typical audience determinant variables. In relation to team quality, although it is common to utilise wages as a proxy for star quality (Scelles, 2017), the BBL operates within a salary cap which equalises talent. In relation to local market characteristics, studies have also considered team age/tenure as a measure of local market embeddedness (Tainsky, 2010), but the BBL remains a nascent competition comprised of equally new teams. In respect to competition structure, the BBL does not have divisions or conferences which complicate the design of season fixturing (Tainsky & McEvoy, 2012). Factors surrounding season scheduling are also of less relevance to the BBL context. A month variable is often included in demand studies to capture seasonality in leagues with longer seasons (Tainsky & McEvoy, 2012), however the BBL operates within a condensed six week window. Variables capturing the simultaneous

broadcast of multiple games, or time of day when broadcast was telecast, have also been considered for leagues with a larger number of teams and fixtures (Tainksy & McEvoy, 2012). In the BBL case however, no games were broadcast concurrently and only 157 of 168 matches were broadcast within an evening timeslot.

Within the final model then, the level one dependent variable HOMESHARE measures the average viewing audience as a proportion of the total local population within the market. Each market holds a varied population size, and therefore utilizing a share of the population metric standardizes audience viewing preferences across the five regions of interest. Standardized values ensure that the null model, required to validate the need for a hierarchical approach (Garson, 2013), tests for true differences between regions rather than detecting absolute differences in population size. The categorical variable REGION is the level two variable which captures the five regions (Sydney, Melbourne, Brisbane, Adelaide and Perth) in which the remaining level one variables are nested. UNCERTAINTY is the absolute difference in home win probability and away team probability derived from the bookmakers' odds, after applying grand mean centering to improve the interpretability of coefficients and reduce potential multicollinearity (Garson, 2013). Bookmaker odds were adjusted for overround (bookmakers' margin) utilizing the Power method (Clarke, Kovalchik, & Ingram, 2017). INTENSITY is an ordinal variable that identifies the number of competing teams within the broadcast capable of reaching the finals at the point of broadcast as a further measure of game quality. In relation to scheduling, WEEKPART is a dichotomous variable that identifies whether the fixture was played on a weekday evening (0 = Monday through Thursday) or weekend (1 = Friday through Sunday). Given the season is played over the Christmas and New Year period, PUBLICHOLIDAY identifies fixtures played on New Years Day and Boxing Day (=1). Finally, level one variable SEASON has five levels (2013/2014,

2014/2015, 2015/2016, 2016/2017, 2017/2018) while HOME GAME is a dichotomous variable indicating the presence (=1) or absence (=0) of a home team within the telecast.

Results

H_1 : Teams will have significantly higher television audiences in their home city than teams from other markets in the first season of free-to-air broadcast.

Table 1 displays the descriptive and inferential statistics required to address Hypothesis 1. Despite small sample sizes within each of the five t tests ($N = 32$), each region had a statistically significant difference between the mean audience of matches that feature a local team compared to matches not involving a local team. All local markets therefore appear to have developed a preference toward their local team(s) near immediately upon broadcast on FTA television. The performance of the Perth and Brisbane markets is particularly notable, in that positive team performance in the first two pre-FTA seasons helped both clubs lead the competition in terms of local viewer preference in Season 1.

Perth appeared to exhibit the largest immediate preference toward its local team, corresponding with the average audience for the Perth Scorchers being 76% larger than for matches not involving their team. Evaluation of Cohen's effect size ($d = 2.18$) suggests a high practical significance to this difference. Although failing to win the competition in the first two seasons, the Perth Scorchers were the most successful BBL team leading into Season 1, given that they reached and hosted the final in the first two seasons. Brisbane recorded the second largest effect size ($d = 1.28$), generating audiences for home matches involving the Brisbane Heat that were 43% larger than matches that did not feature the local team. Although the Brisbane Heat did not qualify for the finals in the inaugural BBL season, they were the premiers of the second season, and therefore entered Season 1 with strong momentum in terms of fan support. The statistical significance of each local audience for local teams across the five markets provides strong support for Hypothesis 1.

Local Share, as presented in Table 1, provides an alternative measure of team support. The figure is calculated as the average audience size for local team matches relative to total viewing universe of the local audience as measured by OzTAM (2013). This allows for the standardization of audience size to account for the varying population of each region, given that Sydney is Australia's largest mainland capital city with 4,734,400 viewing residents, while Adelaide is the smallest with 1,434,000. Applying this metric, Adelaide viewership appears particularly strong, with 5.5% of the Adelaide population watching each Strikers match. Conversely, the aforementioned performance of the Brisbane Heat appears less significant, with only 3.6% of the Brisbane population watching each Heat match. The Brisbane case, therefore, provides a juxtaposition, as the market is among the most comparatively loyal to their team, but the least embracive of the new league overall.

INSERT TABLE 1 ABOUT HERE

H_2 : Consumer preference towards local teams will increase over time.

To begin, the null model was tested to determine the appropriateness of the HLM method, resulting in an intraclass correlation (ICC) of 37.65%. The ICC indicates that approximately a third of the variance in each game's local viewership could be attributed to between-region differences, with the remaining 62.35% attributable within regions (between single broadcasts). This confirms the need for a multilevel approach, while variances within region still necessitate elaboration through a full model. The descriptive statistics of the variables used within the random coefficients HLM are therefore detailed below in Table 2.

INSERT TABLE 2 ABOUT HERE

Based on the null model, the full model was constructed with the addition of six level one variables. The interaction between *Season* and *HomeGame* was also included, being central to testing whether behavioral preference has developed in BBL audiences over time. A significant interaction effect would support Hypothesis two, by suggesting that the size of a local audience for home team matches is contingent on season, thus inferring that the degree of home team support has changed over time. An insignificant interaction between the independent variables would suggest that local interest in watching home team matches has not changed over time when accounting for changes in overall interest in watching BBL and controlling for other audience determinants. The results of the analysis are presented in Table 3.

To address Hypothesis 2, Table 3 presents a HLM for dependent variable HOMESHARE, nested within REGION. The results of the final model illuminate the structure of BBL viewership. Overall BBL viewership increased significantly by season over the period ($SEASON = 0.001449$, $t = 4.697$, $p < .001$), indicating a longitudinal growth in viewer interest over time. Consistent with the findings of Hypothesis 1, the model also revealed a significant preference for telecasts featuring the local team ($HOMEGAME =$

0.0126, $t = 9.124$, $p < .001$). The model however, also yields some perhaps surprising results. Notably, audiences decreased for telecasts scheduled for public holidays (PUBLICHOLIDAY = -0.0027, $t = -1.964$, $p = .05$). Additionally, audiences exhibited a significant preference for telecasts held on weekdays over weekends (WEEKPART = -0.0034, $t = -4.618$, $p < .001$). Perhaps most surprising was an evident audience resilience against outcome uncertainty, which was not significant in the model (UNCERTAINTY = -0.0057, $t = -1.319$, $p = .188$). This result perhaps reflects the narrow range of uncertainty odds associated with the BBL competition, due to equalizing nature of T20 game play. The most unbalanced fixture resulted in an away team win probability of 70%, with only 2.4% of fixtures exhibiting an imbalance greater than 30% (65%-35%). The number of teams within the fixture remaining in contention for finals however displayed significant positive relationship (INTENSITY = 0.0018, $t = 2.343$, $p = .019$), confirming some importance around match quality. To address Hypothesis 2, the interaction between SEASON and HOMEGAME illustrates no significant effect (SEASON*HOMEGAME = 0.0004, $t = 0.827$, $p = .408$).

INSERT TABLE 3 ABOUT HERE

H₃: BBL television viewership exhibits longitudinally stable patterns of consumption.

Analysis of the BBL's seasonal changes in ratings determines the competition to have been volatile, counter to the prediction of Hypothesis 3. This is firstly identified by the significance of independent variable SEASON (SEASON = 0.001449, $t = 4.697$, $p < .001$) within the HLM output described in Table 3. To explore the stability of consumption in more detail however, variation in growth is observed in Table 4. Table 4 illustrates most audience growth occurred in Season 3, and across all five regions. Reverse Helmert contrasts reveal that there is a significant statistical intra-season variance in average viewership across all regions, resulting in a national average audience (Combined Metropolitan) that varies

significantly. Three of four Season contrasts upon the Combined Metropolitan audience are highly significant, with only the increase from Season 1 to 2 narrowly missing the .05 significance threshold (see Table 4). The results of these contrasts result in the rejection of Hypothesis 3.

Measurement of market consumption stability through the average audience however, is comprised of two underpinning components of potential and distinct variance which can be further explored. The average audience is the sum of the aggregate number of people who watched the program at any point (Reach) and the amount of minutes watched per person (Viewing Minutes). Table 4 illustrates that the growth in average audience size over the period was predominantly caused by an increase in consumption per viewer (Viewer Minutes), rather than an increase in the total number of individuals viewing (Reach). While average viewership increased by 13% between Seasons 1 and 5, driving this increase was Viewer Duration, which grew 19%, whereas Reach increased only 5%. Viewership growth has therefore been driven by increased audience commitment rather than a growth in the base of consumers.

INSERT TABLE 4 ABOUT HERE

Discussion and Implications

It is well accepted that establishing a loyal fan base is the key challenge faced by sport organizations (James et al., 2002). Establishing consumer support is a particular challenge for new sport leagues and teams who must also contend with unique changes associated with their formativeness. Two such identified challenges are the influence of novelty as well as support from the broader market, which have largely yet to be explored (Park et al. 2011). The present study thus broadens the scope of the field by assessing market behavior toward new sport leagues and teams over an extended time period, addressing previous calls by Kunkel, Funk and King (2014).

The results of the study support the stated proposition in Hypothesis 1. The findings confirmed that local viewers exhibited a behavioral preference for fixtures involving their local home team in the first season of FTA coverage. This conclusion is consistent with previous media research in both international (Tainsky & Jasielec, 2014) and domestic (Author, 2013) settings, which confirm fan preferences toward local teams within established leagues. That consumers express an immediate preference for new teams is also consistent with existing research on new team identification. Specifically, Lock and colleagues (Lock, Darcy, & Taylor, 2009; Lock et al., 2011) and James et al. (2002) have confirmed that members of new teams are able to generate strong identification in their first seasons, although such studies have focused on more active and highly attached fans. The present study, therefore, advances our understanding of team identification toward new teams by illustrating that near immediate identification can occur at market level as well as among the highly attached subset of fans.

Given that the vast majority of consumers did not have direct viewing access to BBL teams until the introduction of FTA coverage, the immediacy with which local markets adopted a viewing preference for local teams is consistent with Heere and James's (2007) conceptual model of the relationship between external communities and team identification. Although loyalty toward a new team has been observed at a city level among passionate fans (Uhlman & Trail, 2012), these findings illustrate that consumers exhibit localized preferences at a market level early within a team's existence. Teams do not develop an identity in isolation, but rather do so within a confluence of external identities. Although nearly all sport clubs name themselves after their city region as a matter of custom, the findings confirm that a team's name can have an immediate effect upon shaping team identity.

Perhaps more fundamentally, the findings confirm that consumers perceive metropolis cities to represent a legitimate source of identity. For some consumers this identification may

not necessarily be a strong one, with a preference for local team consumption perhaps created solely by associative comparison to non-local teams. For others, it may represent an embryonic conception to deeper psychological connection (Funk & James, 2001). This is none the less significant because, although Heere and James's (2007) conceptual model identifies three levels of geographic identity (city, regional, national), the importance of such identities are a reflection of the underlying communities of which an individual perceives themselves to be a part (Heere, James, et al., 2011). Within the BBL, attachment to city identity was evident across each of the five capital cities, despite an average population size of 3.1 million residents (OzTAM, 2016). The implication for sport practitioners may be simple but nonetheless significant: At a market level, consumers appear influenced by the geographic connection purported by teams. Given the receptiveness of the market to such cues, new teams need to carefully consider whether to align themselves to a suburban, city, state, or regional identity.

Although viewer interest in the league increased during the five seasons of investigation, the results presented in Table 3 do not support Hypothesis 2. Growth in FTA viewership largely occurred across all teams, confirming that consumption growth has been driven by increased overall league interest rather than toward individual local teams. Consistent with the behavioral market patterns predicted by Ehrenberg et al. (2004), the differential in audience interest between local and non-local teams normalized from the inception of the BBL competition (Ehrenberg & Goodhardt, 2000). The largest differential in local audiences during the five seasons was in Perth, whereby the Perth Scorchers played in fixtures that generated 35% of the cumulative Perth audience despite accounting for only 25% of games. However, this was no doubt also a function of their time zone, which suppresses the audience of East Coast matches (played 3 hours later) not involving the local team. In Brisbane, meanwhile, the Heat were involved in fixtures that accounted for 31% of

cumulative Brisbane viewership, despite accounting for 25% of fixtures. While these figures reinforce that local teams increase local audiences (Tainsky & Jasielec, 2014), such small differentials belies the assertion that local teams “capture most—perhaps nearly all—of the value of national rights for many teams” (Noll, 2007, p. 23). Rather, the BBL derives its audience via a relatively representative national dispersion.

BBL viewer interest during the five seasons telecast on FTA television was found to be volatile, resulting in the rejection of Hypothesis 3. Notably, within a five season span, the league had already exhibited evidence of growth, plateauing and retraction. A potential explanation as to why BBL viewership did not conform to theorized marketing norms may relate to the seasonal nature of the BBL sport product. Ehrenberg and Goodhardt’s (2000) research suggests that brands reach a regular repeat purchase rate with final penetration levels stabilizing within approximately 30 to 36 weeks. These findings were based off purchase behavior patterns from within the prescription drugs, food, drink, personal and household cleaning product categories, which are available year-round and thus do not suffer from scarcity. Given the BBL is played annually within a six to seven week window, the totality of its duration over five seasons has equated to 30.5 weeks of availability. As Viewer Duration appeared to normalize between Seasons 3 and 5, it is plausible that the theorized norms predicted by this body of marketing literature may only have begun to emerge towards the end of the analysis period (Ehrenberg, & Goodhardt, 2000; Trinh, Romaniuk, & Tanusondjaja, 2016).

The findings supports the proposition of Mahony et al. (2002) that new leagues initially face challenges in developing loyalty in the face of product novelty among consumers. This is reflected in the longitudinal growth of Viewer Duration for BBL telecasts, which is an effective measure of commitment to viewing. In Season 1, viewers watched an average of 68 minutes per typical 175 minute BBL broadcast, the lowest of the five seasons.

In Season 2, this increased to 74 minutes before increasing and plateauing above 80 minutes from Season 3 onwards. BBL television consumers are therefore shown to be becoming heavier consumers of the product over time (Mullin, Hardy, & Sutton, 1993).

An empirical aspect in which new sport leagues may differ from other settings may be the timeliness with which novelty seeking behavior onsets and peaks. Novelty seeking behavior is said to reflect human desire to seek out the new and different (Hirschman, 1980), with the epistemic value of product linked to the utility derived from the product's capacity to arouse curiosity and novelty (Sheth, Newman, & Gross, 1991). The novelty effect is therefore associated with short-term time horizons and this has certainly appeared true in the context of the impact of superstar athletes, where the effect has been most pronounced in the first season (Shapiro, DeSchrive, & Rascher, 2017; Jewell, 2015; Lawson, Sheehan, & Stephenson, 2008). It is contentious however whether BBL novelty peaked in Season 1 or across Seasons 3 and 4. Season 1 exhibited the lowest commitment to watching telecasts, indicating a greater propensity for curiosity based consumption that was transient in nature (Berlyne, 1960; Park, Mahony, & Kim, 2011). Season 3 and 4 exhibited the highest number of people consuming the BBL, resulting in seemingly abnormally high average ratings which would align more strongly with the collection of previous empirical cases of new sport leagues (Nakazawa et al., 1999; Trecker, 1998).

Conclusion

The BBL represents an opportune sport context in which to evaluate consumer behavior within new leagues and teams. This study's focus on television ratings as the dataset for analysis was also opportune given that previous research on new teams and leagues has almost singularly focused on club STH. While that cohort represents a club's most passionate and resilient market segment, it constitutes a relatively small proportion of the overall market.

The present study addresses that limitation by considering fan behavior and preferences at a market level, as reflected by television ratings.

The research offers new contributions to our investigation and understanding of new sport leagues and teams. First, whereas previous research focused solely upon STH, the current study extended the data set to focus on television viewership preference. Local audiences were found to exhibit an instantaneous viewing preference toward local teams, generating viewership approximately 30% larger than for non-local games. This finding expands the boundary conditions upon which social identity theory has been tested upon new sport teams, confirming that entire markets (cities) exhibit biases towards new local teams. This expands upon the works of Lock et al, 2009; Lock et al., 2011, James et al., 2002) and is consistent with Heere and James's (2007) conceptual model. Second, local audiences did not become more interested in local teams over time but rather largely fluctuated concurrently with interest in the league as a whole. This was significant because it illustrated that growing television audiences is a league-led rather than a team-led task (Kunkel et al., 2014). Only two identified cases of local audience growth were identified, both reflecting cases of BIRGing which appeared amplified due to the absence of established history or performance to define brand associations to develop ingrained customs.

Finally, the present study explored consumer novelty in the context of a new league, adding to a small pool of scholarship to explore sport curiosity and novelty (Park, Mahony, & Kim, 2014). It concluded that the league appears to have experienced an initial period novelty seeking behavior by consumers (Hirschman, 1980), with potential stabilization of market consumption towards the end of the analysis period (Ehrenberg & Goodhardt, 2000). These findings were consistent with the limited pool of existing empirical enquiry into initial fortunes of new sport leagues as a whole (Mahony et al., 2002), providing some evidence

toward an empirical generalization that the fourth season of a new sport league represents a turning point in respect to novelty and embeddness.

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