



## RFU Adult Competition Review – revised draft

November 2012

## Contents

1. Background, objectives and sample overview
2. Executive summary
3. Overall satisfaction with competition structure
4. Feedback on the current competition structures, and potential changes
5. Key areas of frustration, and barriers to playing rugby
6. The impact of time and cost of travel
7. Appendix





## 1. Background, objectives and sample overview



## Objectives of the research

The RFU is currently undertaking a review of its adult competition structures, encompassing levels 3 to 12 of the game.

The RFU has commissioned FreshMinds Research to help with this review by conducting research with players to understand their thoughts and opinions on competition structures.

### The research helps to understand:

- The most appropriate competition structure to meet the needs of clubs and players.
- The most appropriate competition model flex to meet the changing demographic of rugby players.

### More specifically, the research also provides an understanding of:

- The level of satisfaction with the existing competition structure:
  - The pros and cons of existing competition models
  - The pros and cons of the promotion and relegation structure
  - Length and timing of league structures and frequency of competition
- The importance of new models of play, including: Touch, Sevens, and other models
- Geographical and travel considerations



# Methodology

**Kick-off meeting**

**Player groups**

**Interim report**

**Online survey**

**Interim data  
working  
session**

**Final report**

Focus groups took place with a total of 8 clubs. The groups included both male and female players, with a variety of ages and competition levels across a range of different locations.

## **Focus of this document and session**

A 20 minute online survey was conducted to quantify and further explore the findings of the focus groups.

The survey was completed by a total of 1822 rugby players (including existing and lapsed players).

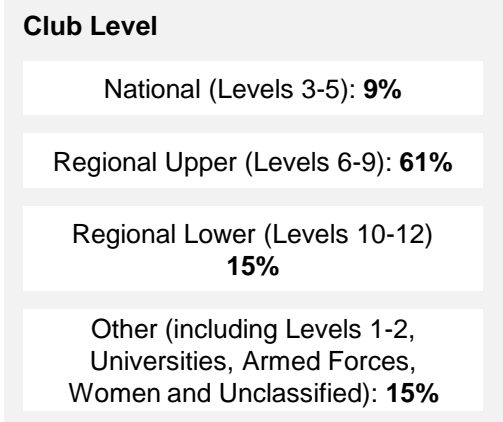
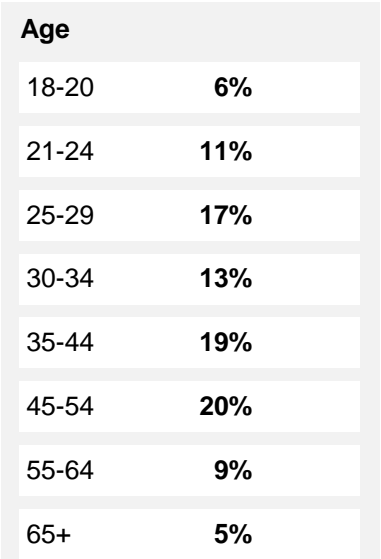
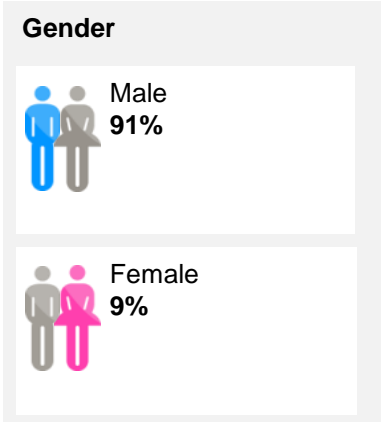
Respondents were recruited to the survey using a variety of different recruitment channels.

Fieldwork took place between July and October, 2012.

This presentation is the first run through of the data and focuses on the overall findings. Further investigation of differences by region and level of player will be explored at a later date.

# Sample (All players)

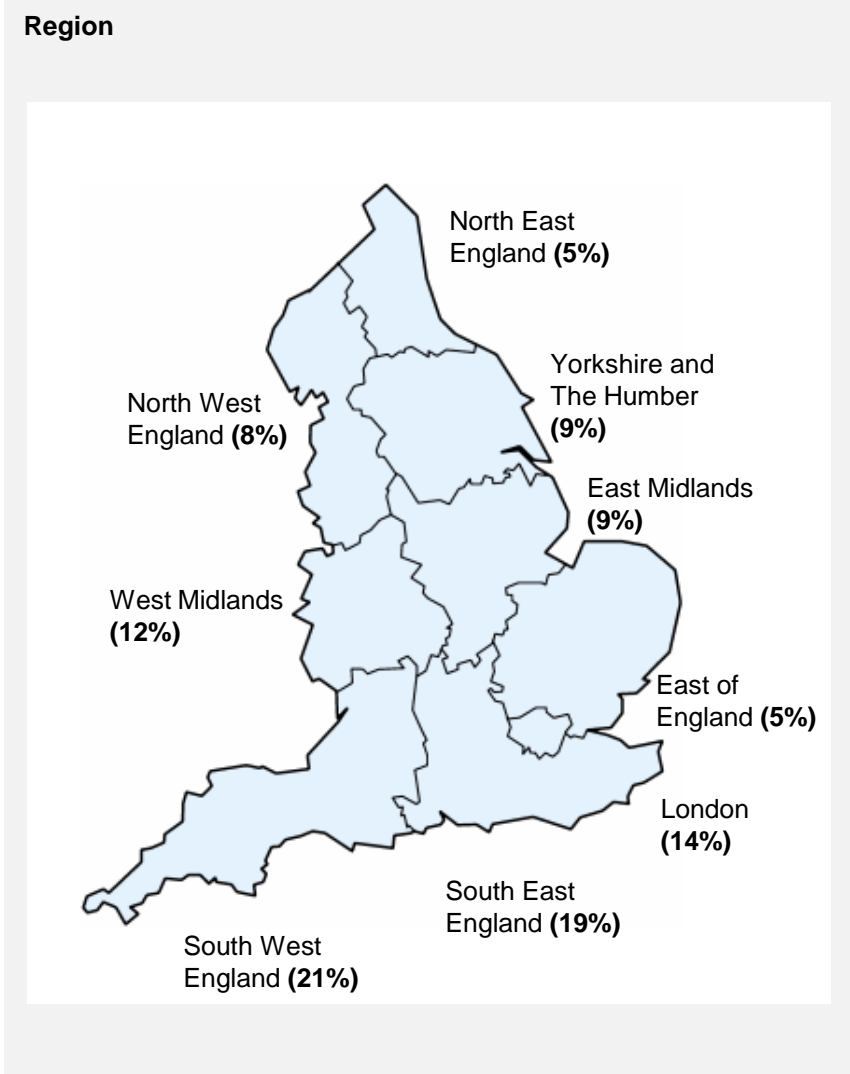
## TOTAL ALL PLAYERS (EXISTING AND LAPSED): 1822



Note: the 'Other' category is not focused on in this analysis

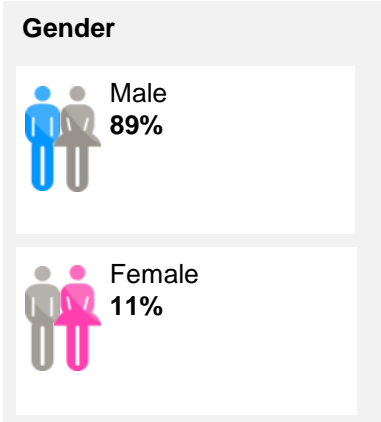


Note: Only asked to current players



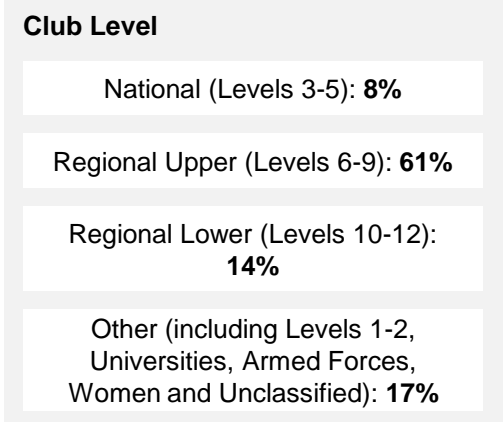
# Sample (Currently playing)

TOTAL CURRENT PLAYERS: 1236



### Age

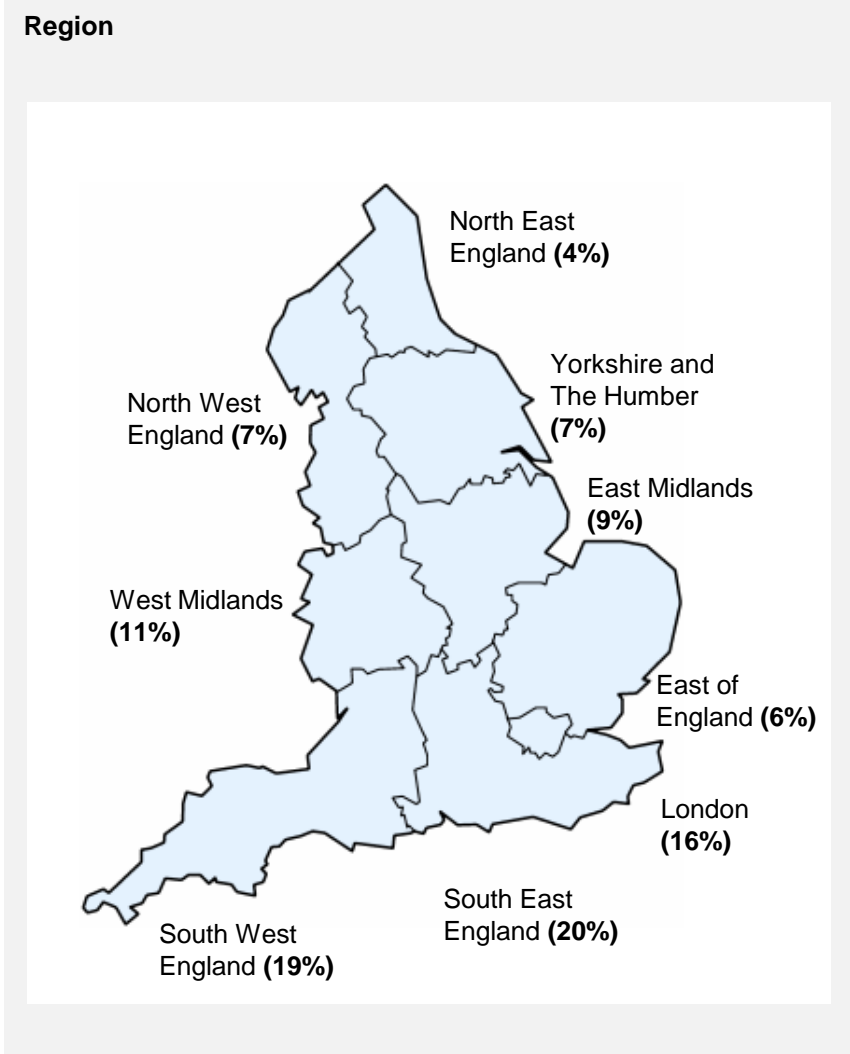
18-20	9%
21-24	15%
25-29	23%
30-34	16%
35-44	20%
45-54	15%
55-64	2%
65+	0%



Note: the 'Other' category is not focused on in this analysis

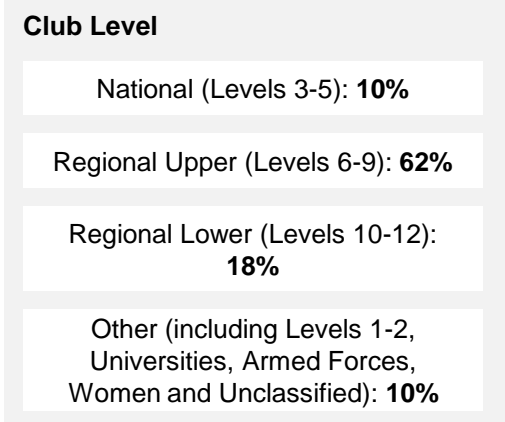
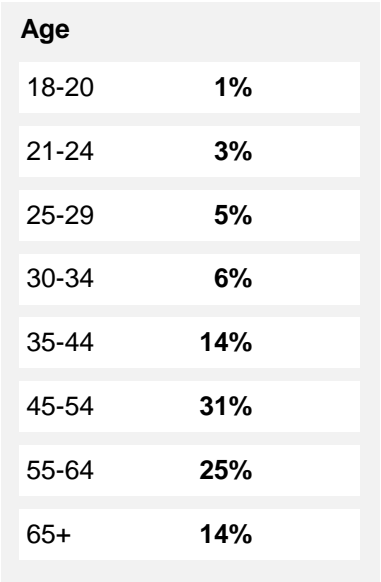
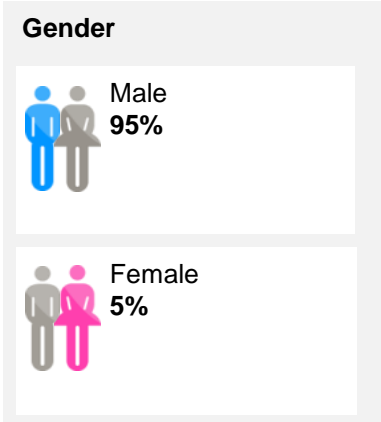
### Length of time playing rugby

Less than 1 year	2%
1-2 years	3%
3-5 years	8%
6-10 years	16%
11-20 years	35%
21-30 years	20%
31+ years	16%

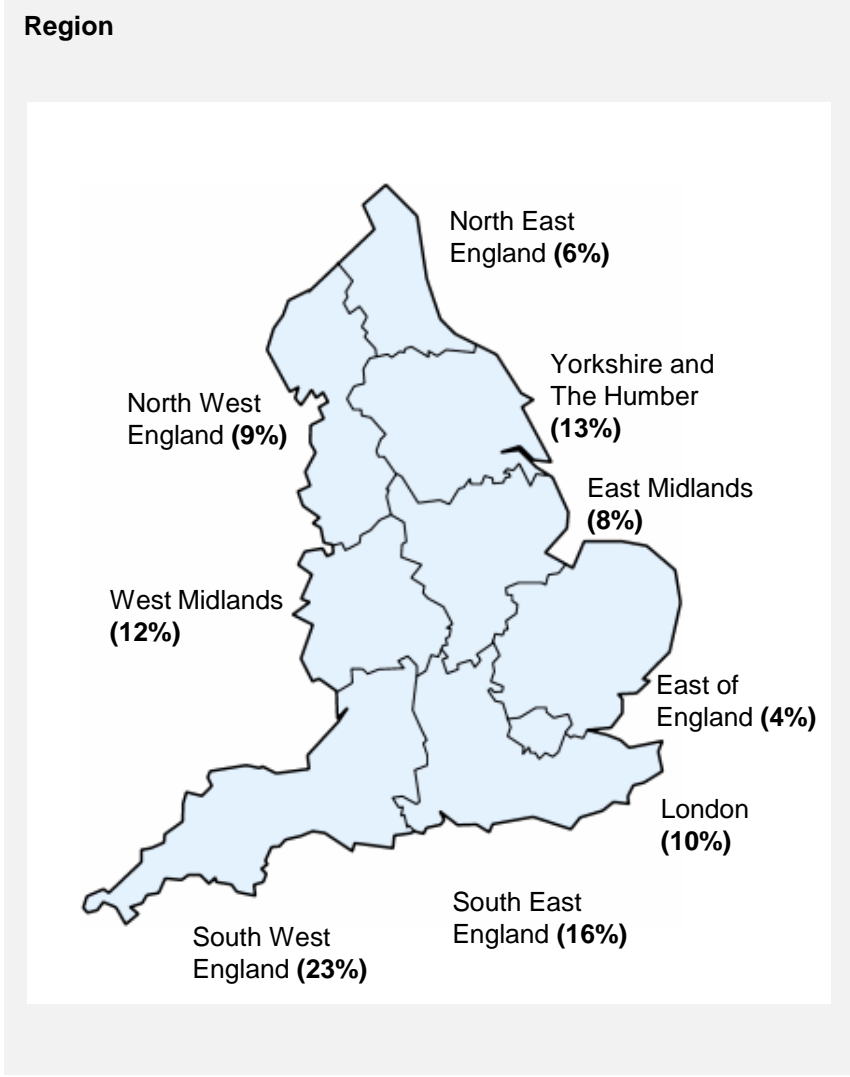


# Sample (Lapsed players)

TOTAL LAPSED PLAYERS: 586



Note: the 'Other' category is not focused on in this analysis

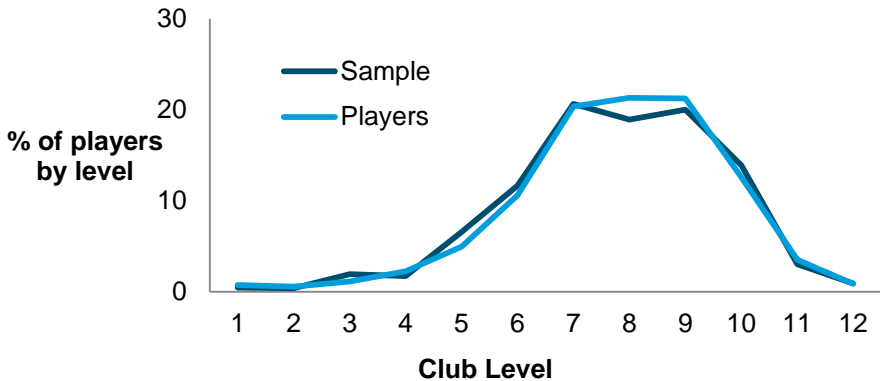




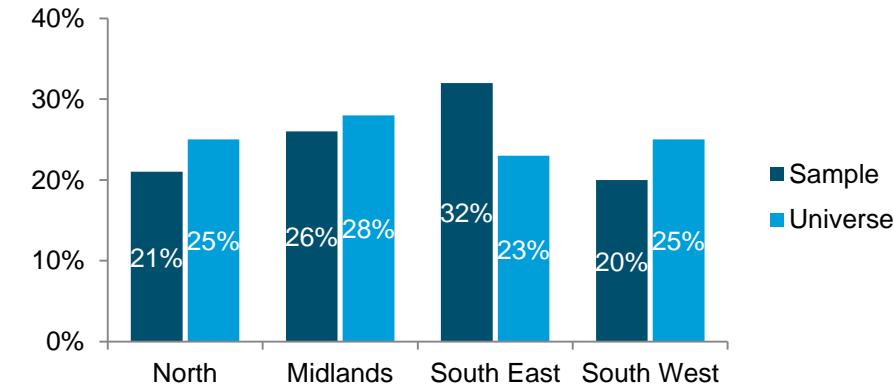
# Sample comparisons

Based on the total sample of 1822 which includes lapsed players and explains age bias. Area confidence limits run from +5.5% (South West and North), and +-4.5% (South East)

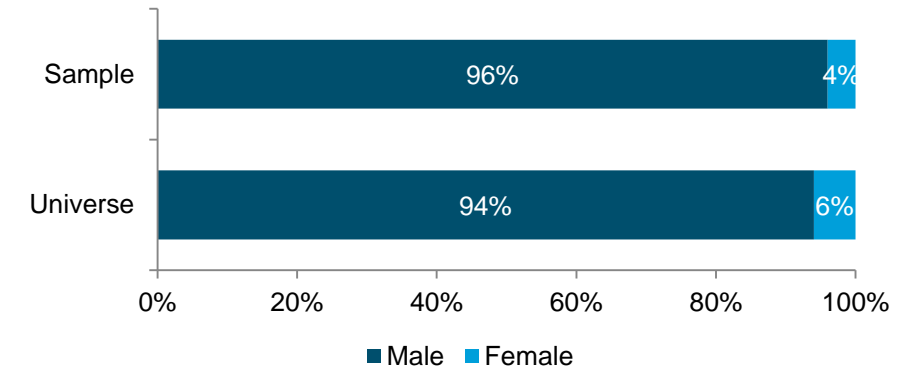
Sample and Universe distribution by club level



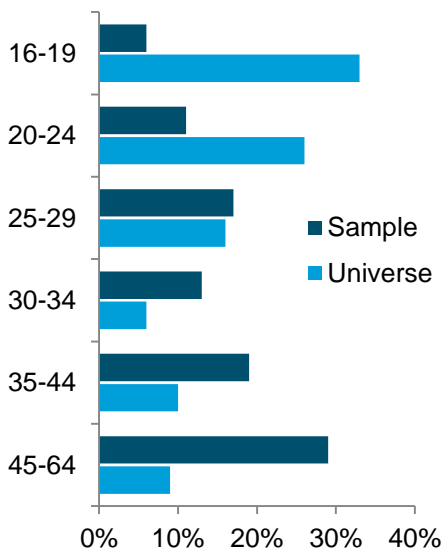
Sample and Universe distribution by area



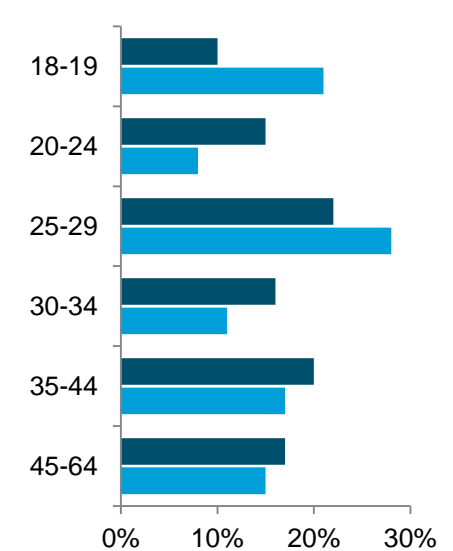
Sample and Universe distribution by gender



Sample and Universe distribution by all ages




Sample and Universe by age 18+ and no university



Midlands = East/West Midlands and East; South East = London and South East



## 2. Executive summary



The majority of current players (58%) are 'very satisfied' with playing club rugby.

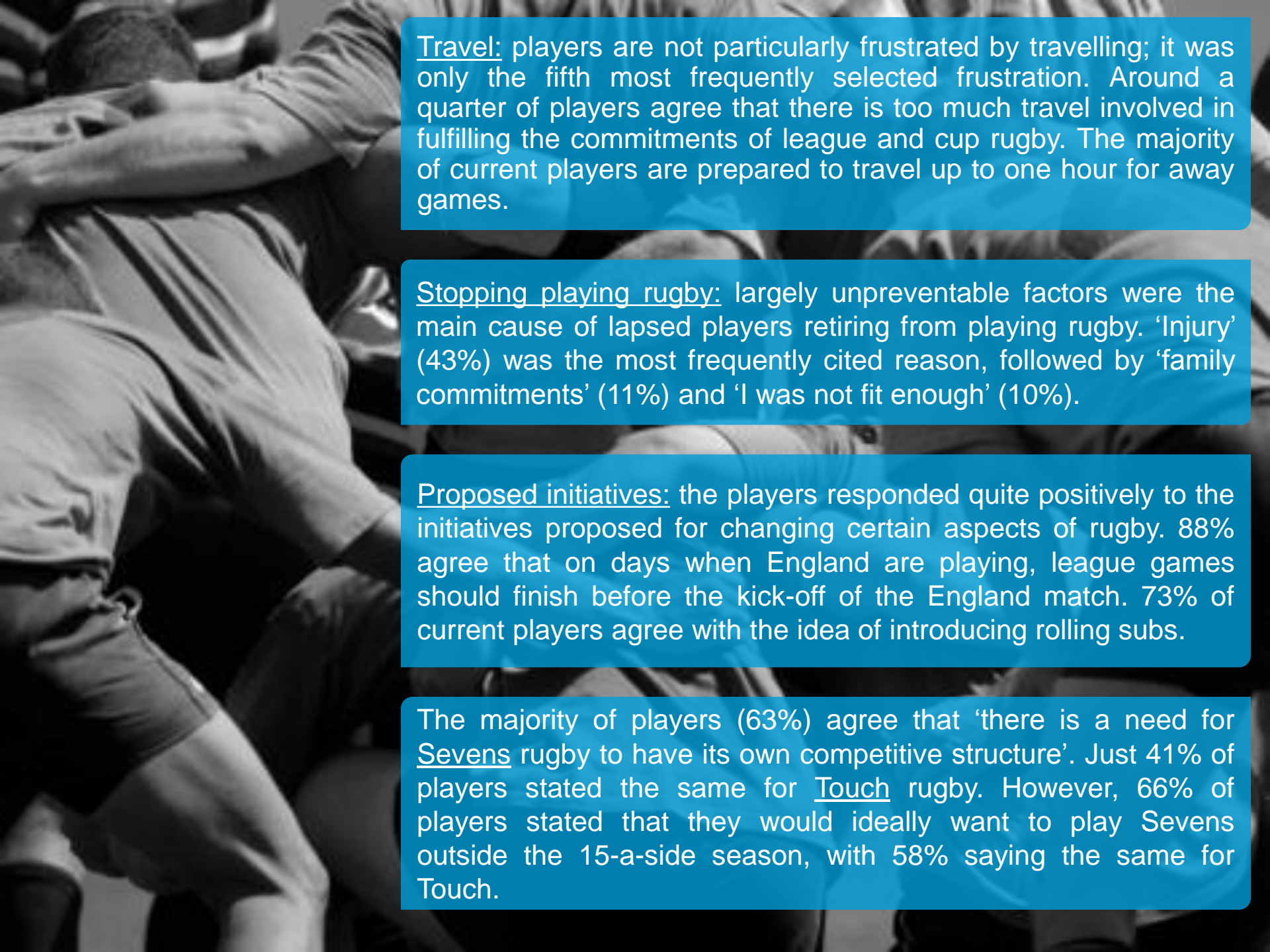
League rugby: 70% of are happy about how the league they play in operates. Players are generally content with the league structure, with 90% agreeing it is 'good that teams are promoted or relegated'. The only potential change to league structure that the majority (65%) of players agree with was that, 'there should be a mechanism through which clubs are allowed to decline promotion'.

Cup rugby: the current structure of cup rugby is popular with players. 94% of players agree that 'winning a cup is a good achievement' and 81% like playing in cup competition.

The one proposed change that the majority (66%) of players agree with was that there should be games arranged for teams that are knocked out in the early rounds of cup competitions.

The payment of players: whilst 69% of current players agree that the RFU should introduce 'legislation which controls the payment of players at lower levels of the league structure', the number of players identifying the payment of players as a problem was somewhat lower: 46% of current players who participated in a league agree that 'the payment of players is a significant problem for the sustainability of club rugby' and 36% agree that 'players being paid leads to unfairness in our league'.





Travel: players are not particularly frustrated by travelling; it was only the fifth most frequently selected frustration. Around a quarter of players agree that there is too much travel involved in fulfilling the commitments of league and cup rugby. The majority of current players are prepared to travel up to one hour for away games.

Stopping playing rugby: largely unpreventable factors were the main cause of lapsed players retiring from playing rugby. 'Injury' (43%) was the most frequently cited reason, followed by 'family commitments' (11%) and 'I was not fit enough' (10%).

Proposed initiatives: the players responded quite positively to the initiatives proposed for changing certain aspects of rugby. 88% agree that on days when England are playing, league games should finish before the kick-off of the England match. 73% of current players agree with the idea of introducing rolling subs.

The majority of players (63%) agree that 'there is a need for Sevens rugby to have its own competitive structure'. Just 41% of players stated the same for Touch rugby. However, 66% of players stated that they would ideally want to play Sevens outside the 15-a-side season, with 58% saying the same for Touch.



## Key findings on differences between groups – structure of league

- > Team played for (1<sup>st</sup> XV, 2<sup>nd</sup> XV etc) does not influence players feelings on time off as there are no differences for agreement with either 'leagues should have fewer teams so that fewer league matches are played so that players can have time off to recover' or 'leagues should have fewer teams so that players can have time for other commitments'.
- > There is a very small difference in opinion between 'younger' age groups (18-29 year olds vs 30-54 year olds) on more matches being 'played on different days of the week to reflect changing work patterns' though older players are less likely to agree: 39% of 18-29 year olds agreed with the statement, compared to 38% of 30-54 year olds and 28% of 55+ year olds.
- > Nor are there differences by age for agreement with the statement that more matches should be played on a midweek evening, to allow time off at weekends.
- > There is greater agreement among lower XV teams with 'there should be greater opportunities for multiple teams from a club to play the same opposing club on the same day and place', although this is high across the board: 1<sup>st</sup> XV – 75% (n = 613), 2<sup>nd</sup> XV – 83% (n = 289) and 3<sup>rd</sup> – 6<sup>th</sup> XV – 84% (n= 267)

## Key findings on differences between groups – structure of league

- > **Although there are low base size the trend suggests that unfairness due to player payment is a bigger issue among the lower levels:** level 6: 47% agreement (n=99), level 5: 32% agreement (n=50), level 4: 21% agreement (n=14), level 3: 21% agreement (n=24)
- > **Agreement with the statement ‘even if we had won our league, I would not want to be promoted’ is highest for regional upper level teams:** national (level 3-5): 17% agreement (n=88), regional upper (level 6-9): 31% agreement (n=679), regional lower (level 10-12): 20% agreement (n=161)
- > **Agreement with this statement also varies by team played for, with lower teams less likely to disagree:** 1<sup>st</sup> XV: 59% disagreement (n=589), 2<sup>nd</sup> XV: 55% disagreement (n= 273), 3<sup>rd</sup>-6<sup>th</sup> XV: 46% disagreement (n=191)



## Key findings on differences between groups – number of matches

- > **National level players are more inclined to think that there are too many leagues compared to regional level teams:** national (level 3-5): 18% agreement (n=88), regional upper (level 6-9): 13% agreement (n=671), regional lower (level 10-12) 9% agreement (n=161)
- > **Unsurprisingly, the larger the league size the more players feel that there are too many matches, with agreement accelerating for leagues of 13 to 14 teams:** 8 and under teams: 8 % agreement (n=113), 8-10 teams: 11% agreement (n=369), 11-12 teams: 12% agreement (n=364), 13-14 teams: 20% agreement (n=153)
- > **There are no significant differences between league sizes – all have similar levels of agreement**

## Key findings on differences between groups – cup rugby and rolling subs

- > Team played for influences feelings towards cup rugby as 1<sup>st</sup> XV teams are more likely to agree that cup rugby comes a poor second to league rugby.
- > A regional cup competition is of greater interest than a national competition to those players who didn't enter Cups last year.
- > There is very little difference between feelings on the travel involved in fulfilling the commitments of cup rugby though again, higher team players feel there is too much commitment involved in cup rugby: 3<sup>rd</sup>-6<sup>th</sup> XV – 21% agreement, 2<sup>nd</sup> XV – 23% agreement and 1<sup>st</sup> XV – 26% agreement.
- > Players in higher XV teams are more likely to agree that they 'would value the opportunity to play county rugby': 1<sup>st</sup> XV – 78% (n = 613), 2<sup>nd</sup> XV – 61% (n = 289), 3<sup>rd</sup> – 6<sup>th</sup> XV – 51% (n= 267)
- > The base sizes for levels for agreement with 'the introduction of rolling subs is a good idea' are too small to comment on at a robust level: Level 3 – 68% agree (n=25), Level 4 – 63% agree (n=16)



## Key findings on differences between groups - travel

- > The base sizes for willingness to travel at level 3 and level 4 are too low to comment on .
- > Players in higher teams are more likely to agree with the statement that ‘there is too much travel involved in fulfilling the commitments of league rugby’: 3<sup>rd</sup>-6<sup>th</sup> XV – 22% agreed with the statement, 2<sup>nd</sup> XV – 28% agreed, 1<sup>st</sup> XV – 29% agreed
- > 2<sup>nd</sup> XV players are the most likely groups to agree that ‘the time spent travelling to and from matches puts me off playing matches’: 1<sup>st</sup> XV – 23% agreement, 2<sup>nd</sup> XV – 29% agreement, 3<sup>rd</sup>-6<sup>th</sup> XV – 17% agreement.
- > Lower teams are less likely to agree that ‘I am more likely to travel longer distances if the club hires a bus: 1<sup>st</sup> XV – 68% agreement, 2<sup>nd</sup> XV – 66% agreement, 3<sup>rd</sup>-6<sup>th</sup> XV – 53% agreement.
- > There is little difference by team on whether ‘the cost of travelling to and from matches puts me off playing matches’: 1<sup>st</sup> XV – 21% agreement, 2<sup>nd</sup> XV – 18% agreement and 3<sup>rd</sup>-6<sup>th</sup> XV – 17% agreement.



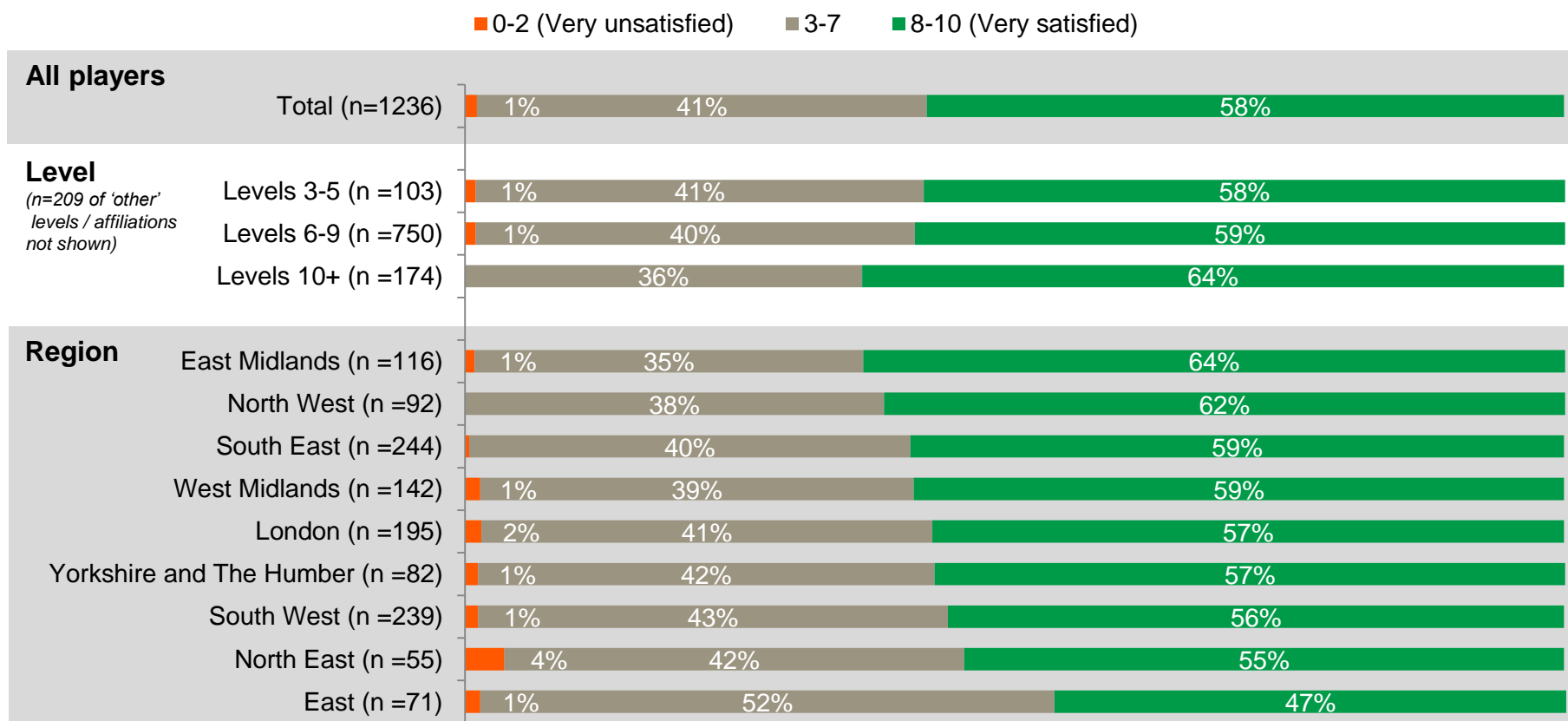


### 3. Overall satisfaction with competition structure

# Overall satisfaction with playing club rugby was high

- Over half of respondents (58%) gave a score of 8 or above for how satisfied they were with their experience of playing club rugby.

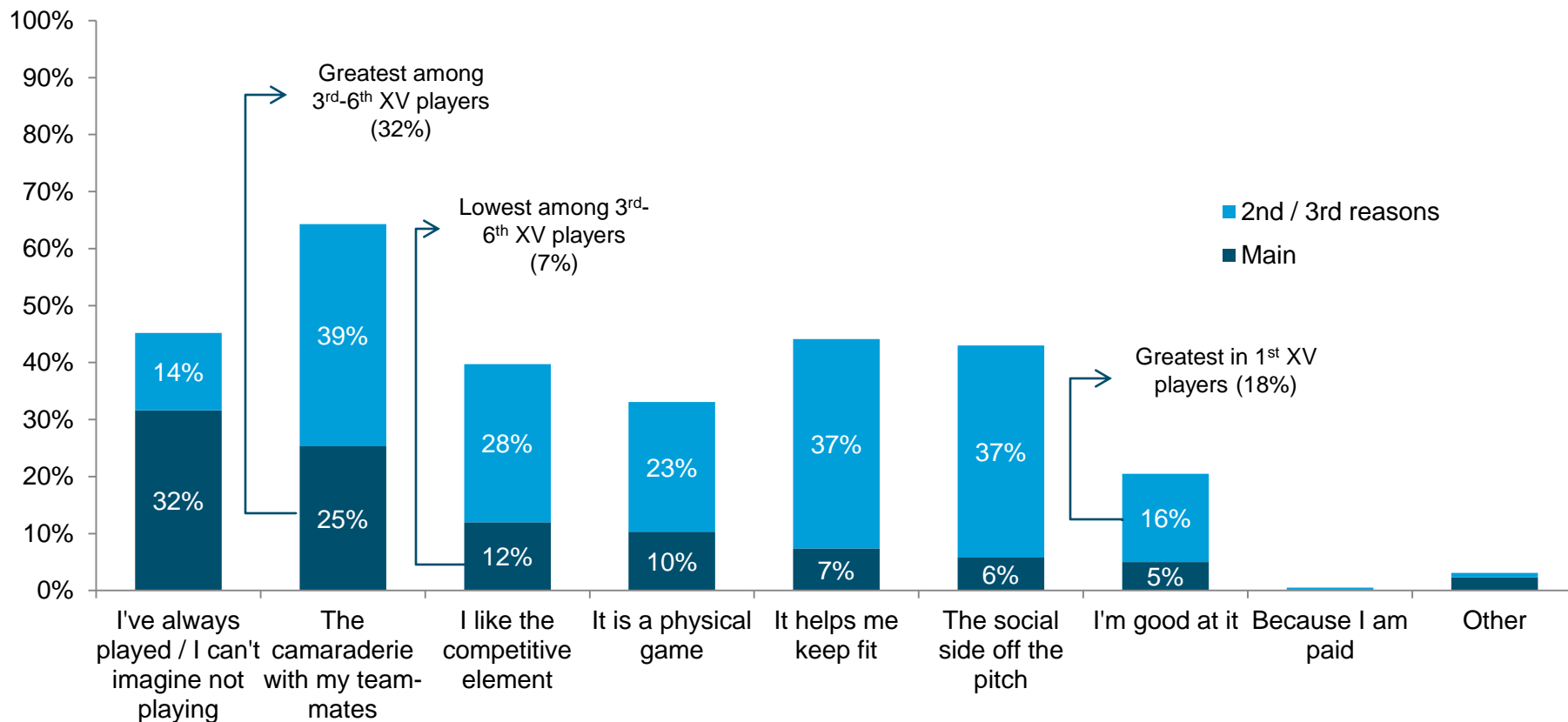
## Satisfaction with current experience of playing club rugby



# The most common reason for playing rugby was the camaraderie with teammates

- The main reasons for playing rugby are focused around having always played the game. Many cannot imagine not playing, suggesting rugby is an important part of their life. The social side of rugby, and the fitness it provides, were other common reasons for playing, although rarely the most important.

Reasons for playing rugby



Q4. What is the main reason why you play rugby? (Single code)

Q5. If there are other reasons why you play rugby, please select the next two most important reasons. (Multicode)

Bases (all current players): 1236



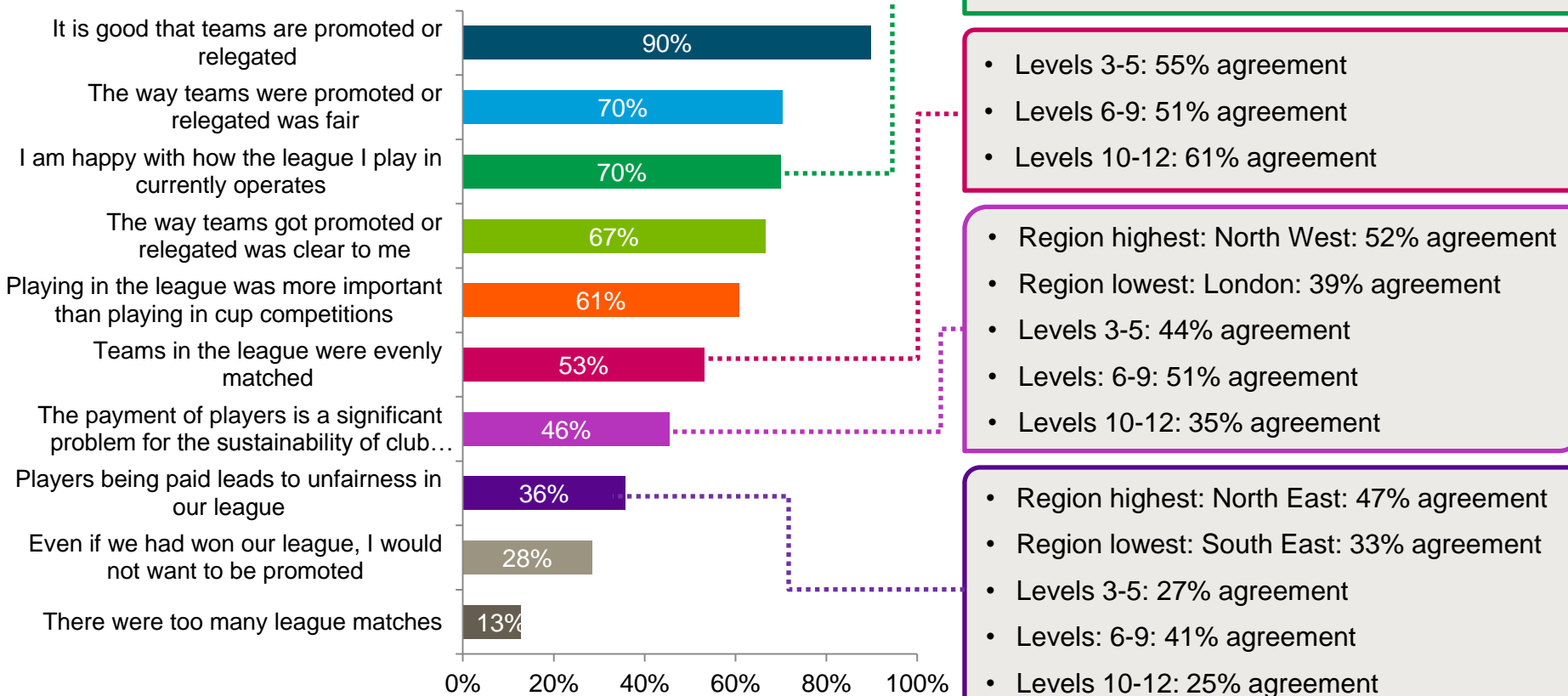


#### **4. Feedback on the current competition structures, and potential changes**

# The majority of players (70%) agree that they are happy about how the their league operates

- Players are most likely to agree with the statement 'it is good that teams are promoted or relegated' (90%).
- 46% of players agree that, 'the payment of players is a significant problem for the sustainability of club rugby'.
- Players are least likely to agree that, 'there were too many league matches' (13%).

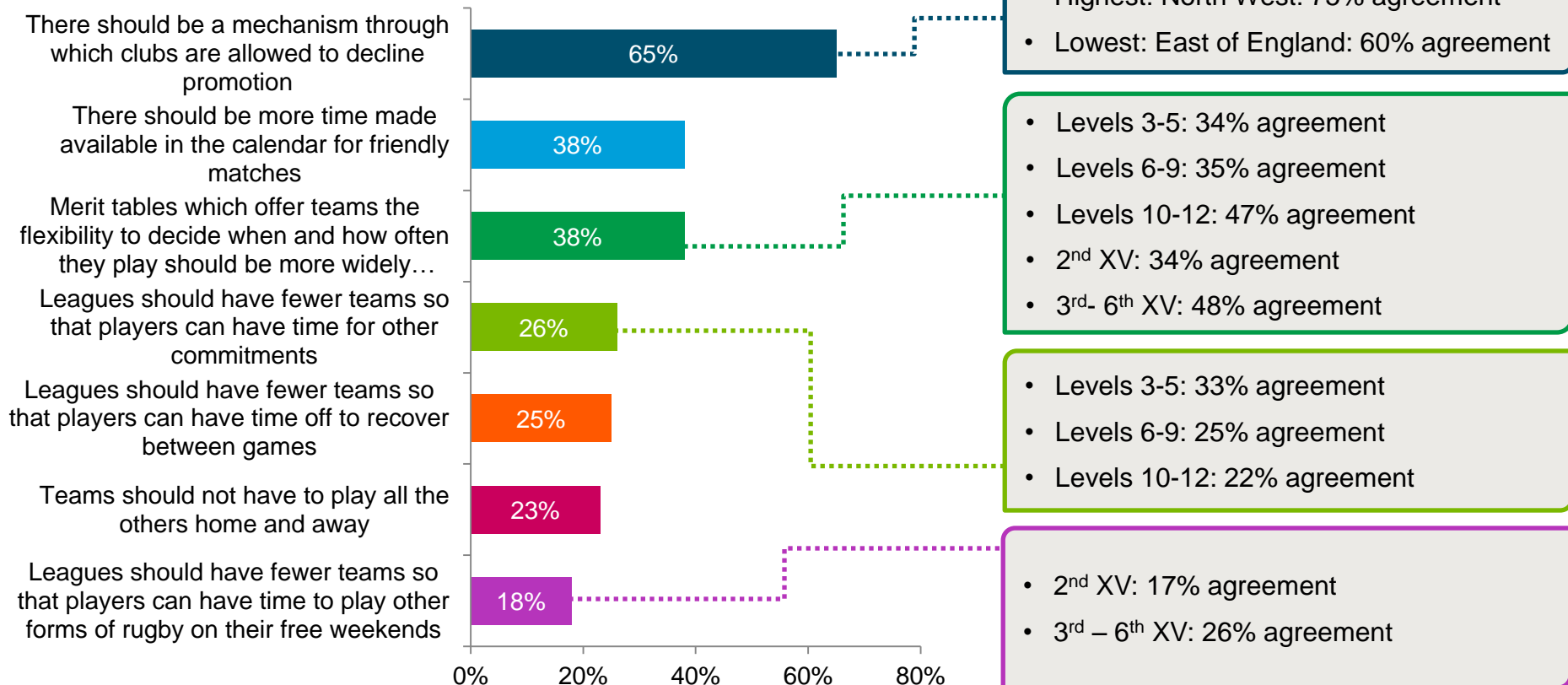
## League competition (NET agreement)



# For the most part, players do not agree with the proposed changes to league structure

- Just 18% agree that, 'leagues should have fewer teams so players can have time to play other forms of rugby'.
- However, the majority of players (65%) agree that clubs should be allowed to decline promotion.
- There is greater traction with merit tables among players in lower level and ranking teams

## Potential changes to league structure (NET agreement)

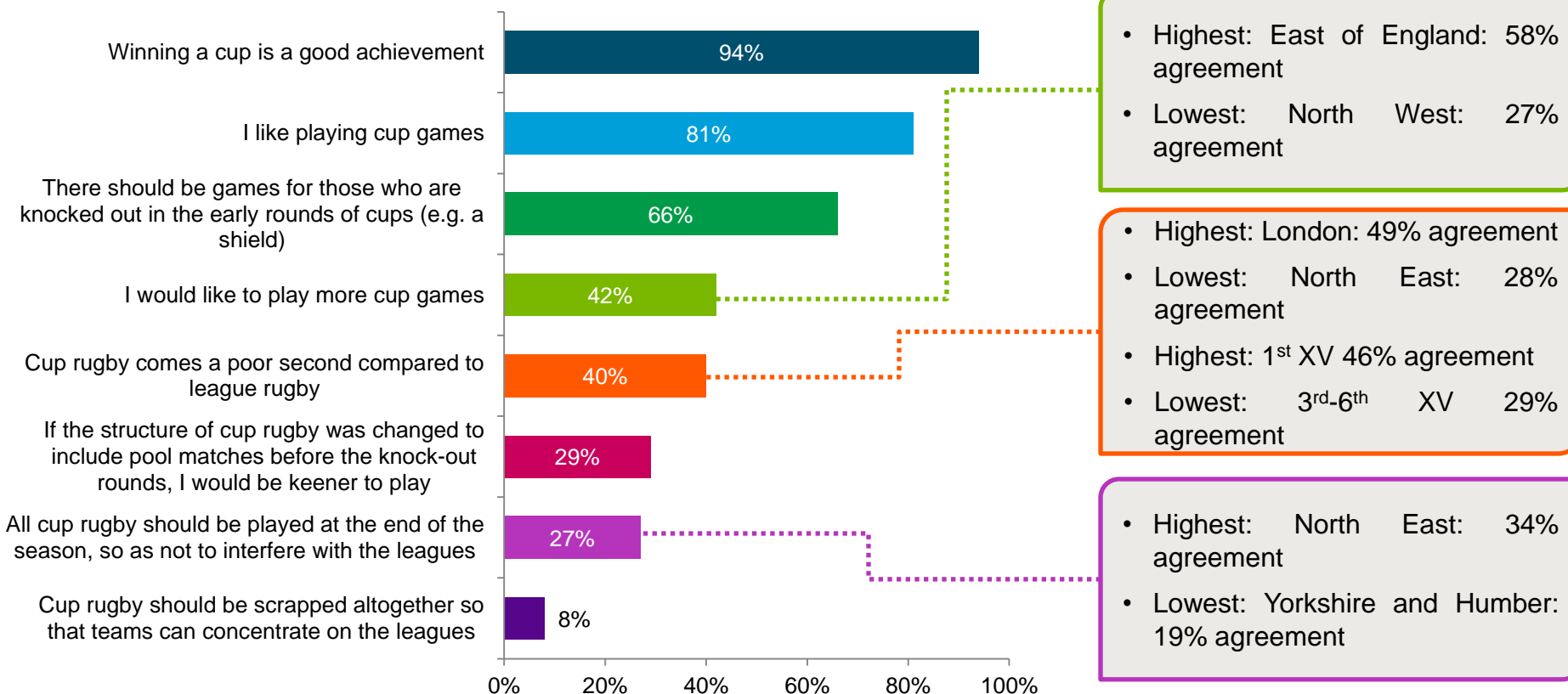




# The current format of cup rugby is popular

- The substantial majority of players (94%) agree that 'winning a cup is a good achievement'.
- Players are second most likely to agree with the statement 'I like playing in cup games' (81%).
- Just 8% of players agree that 'cup rugby should be scrapped altogether so that teams can concentrate on the leagues'.

## Cup competition (NET agreement)

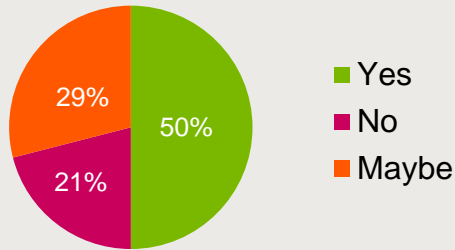


# A regional cup competition is of greater interest than a national competition to those players who didn't enter Cups last year

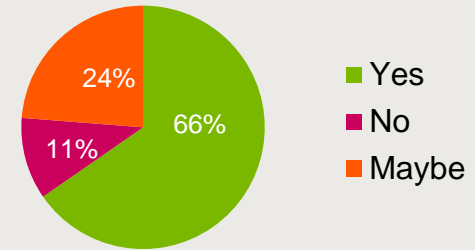
- 3<sup>rd</sup> – 6<sup>th</sup> XV team players are less interested in Cup competitions than 1<sup>st</sup> XV players

## Desire to play in Cup competition (NET agree and disagree)

### National



### Regional



## Profile of those NOT interested in Cup rugby

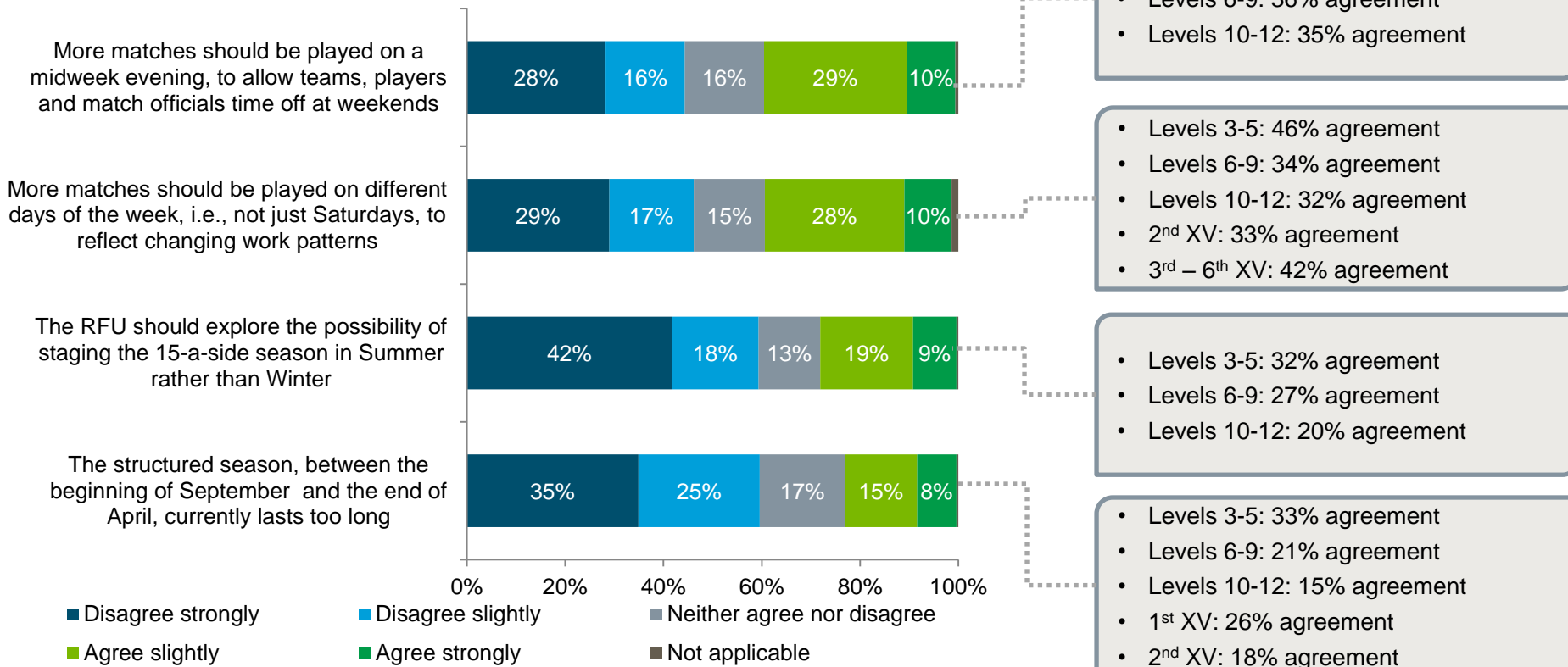
- More likely a 3<sup>rd</sup>-6<sup>th</sup> XV team player (28%) compared to a 1<sup>st</sup> XV player (15%)
- Least interest among players in the West Midlands (27% No) compared to the South West (15% No)
- No differences by level or league size

- More likely a 3<sup>rd</sup>-6<sup>th</sup> XV team player (17%) compared to a 1<sup>st</sup> XV player (7%)
- No differences by level, region or size of league

# Players are generally happy with the structure of the season

- Players are divided as to whether more matches should be played mid-week or on different days of the week.
- 60% of players disagree with the idea that RFU should explore staging the 15-a-side season in Summer rather than Winter; and the same percentage disagree with the idea that the structured season lasts too long.

## Structure of the season & match timings (NET agreement)



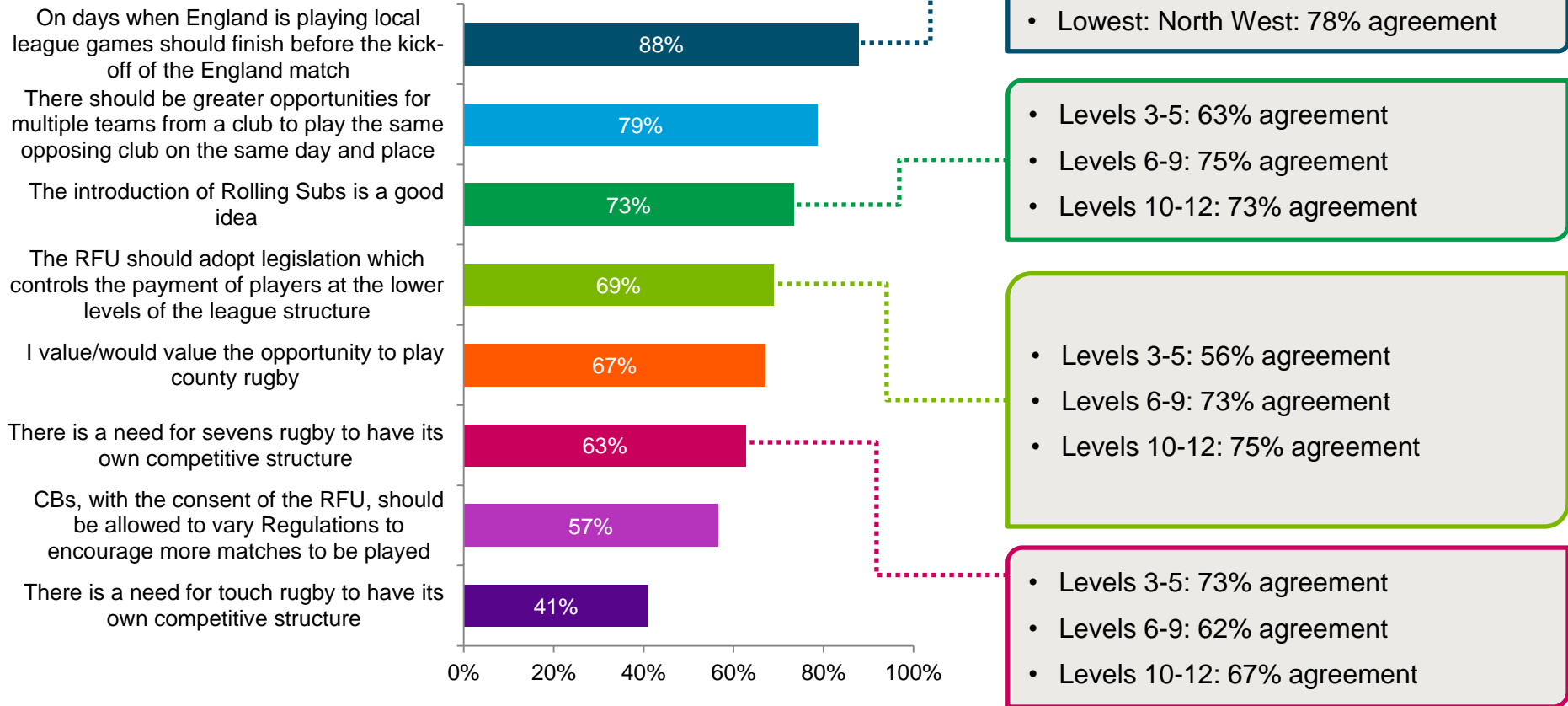
Q27. Below is a set of statements relating to when leagues and cups happen. For each statement please state how much you agree or disagree. Base (all current players): 1236  
 Q28. Below is a set of statements relating to when matches happen. For each statement please state how much you agree or disagree. Base (all current player): 1236



# Players generally approve of the proposed initiatives

- The majority (88%) of respondents agree that when England play, league games should finish before the international kick-off time.
- 69% of players agree that the RFU should control the 'payment of players at the lower levels of the league structure'.

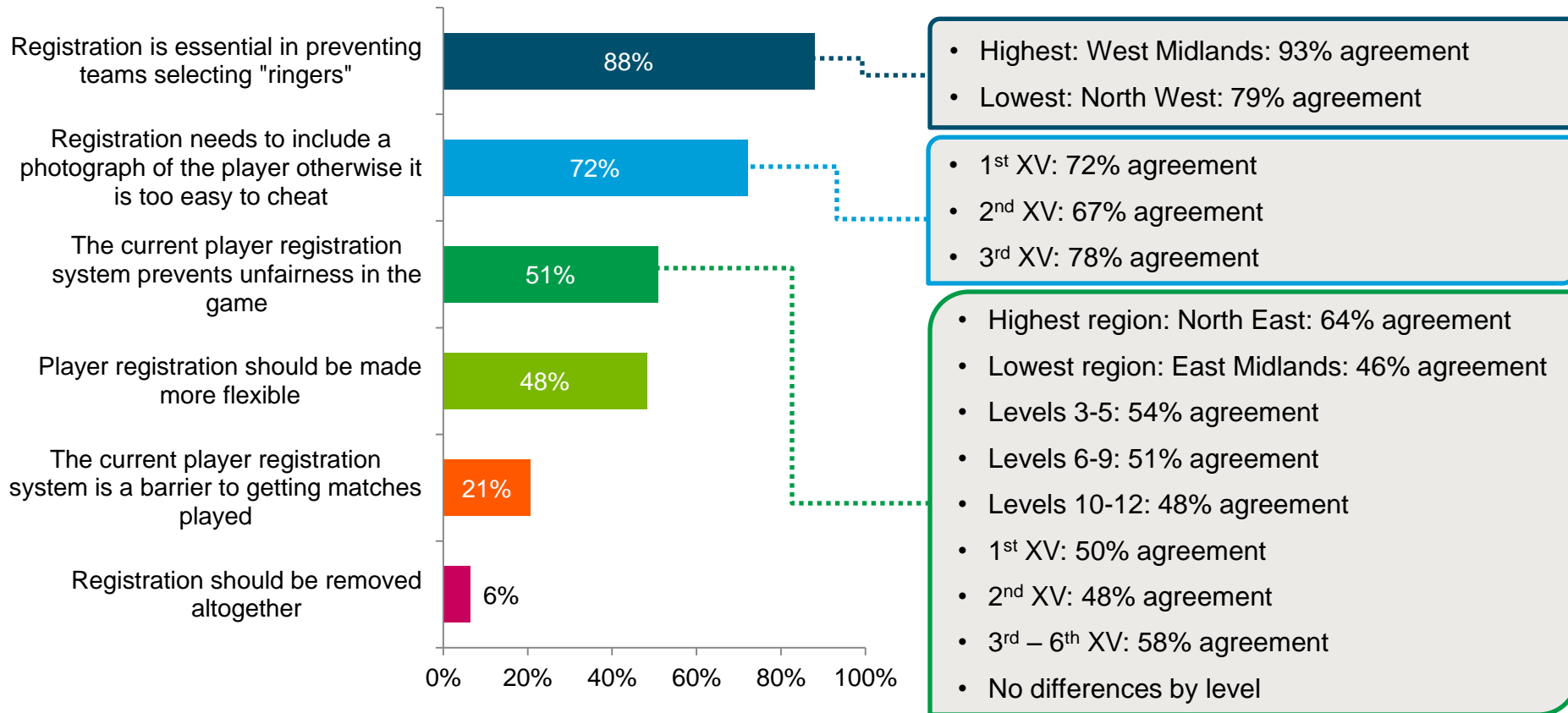
## Changes to rugby (NET agreement)



# The majority of players (88%) agree that 'registration is essential in preventing teams selecting "ringers"'

- Just over half of players (51%) agree that the 'current system prevents unfairness', suggesting that many think there is room for improvement.
- Only 6% of players agree that 'registration should be removed altogether'.

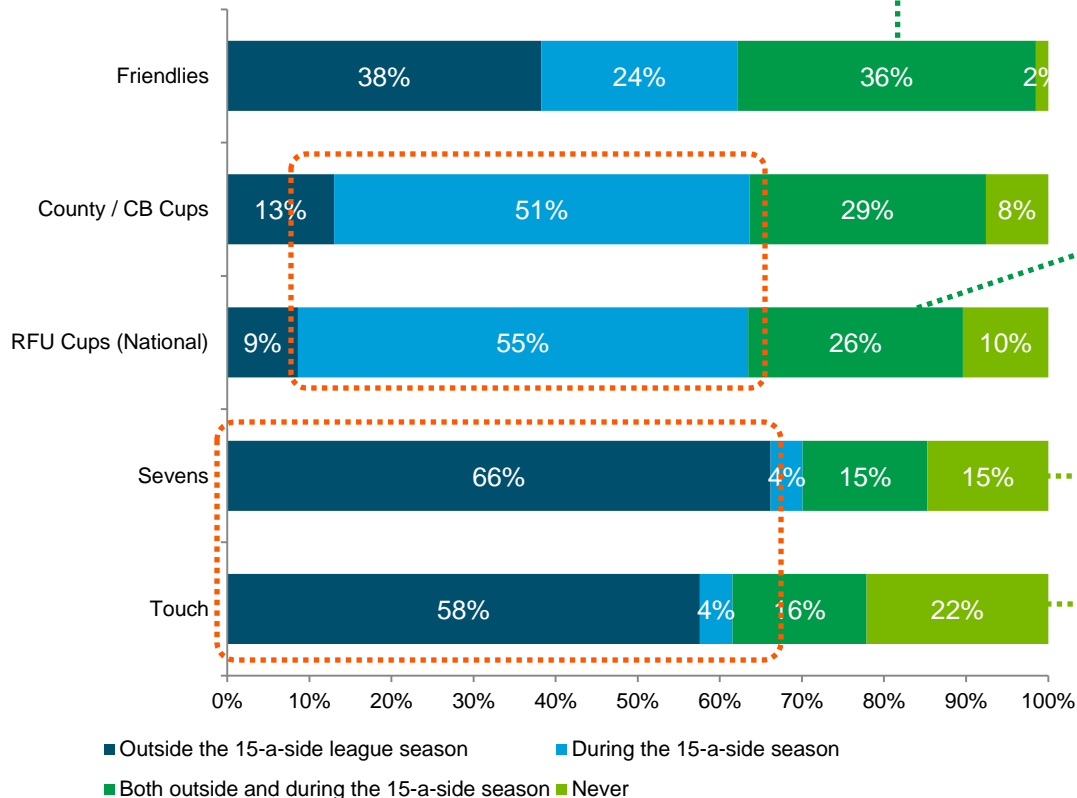
## Player registration (NET agreement)



# 66% of players state that the ideal time to play Sevens rugby is outside the 15-a-side season

- 58% of players want to play Touch rugby outside the current 15-a-side season.
- The majority of players are happy to play national (55%) and county (51%) cups during the 15-a-side season.
- 22% of players state that they would 'never' want to play Touch rugby.

Timing of different match types



- Levels 3-5: 29% 'both outside and during'
- Levels 6-9: 35% 'both outside and during'
- Levels 10-12: 45% 'both outside and during'

- Levels 3-5: 19% 'both outside and during'
- Levels 6-9: 28% 'both outside and during'
- Levels 10-12: 26% 'both outside and during'

- Highest 'never': North East: 26%
- Lowest 'never': Yorkshire and Humber: 7%

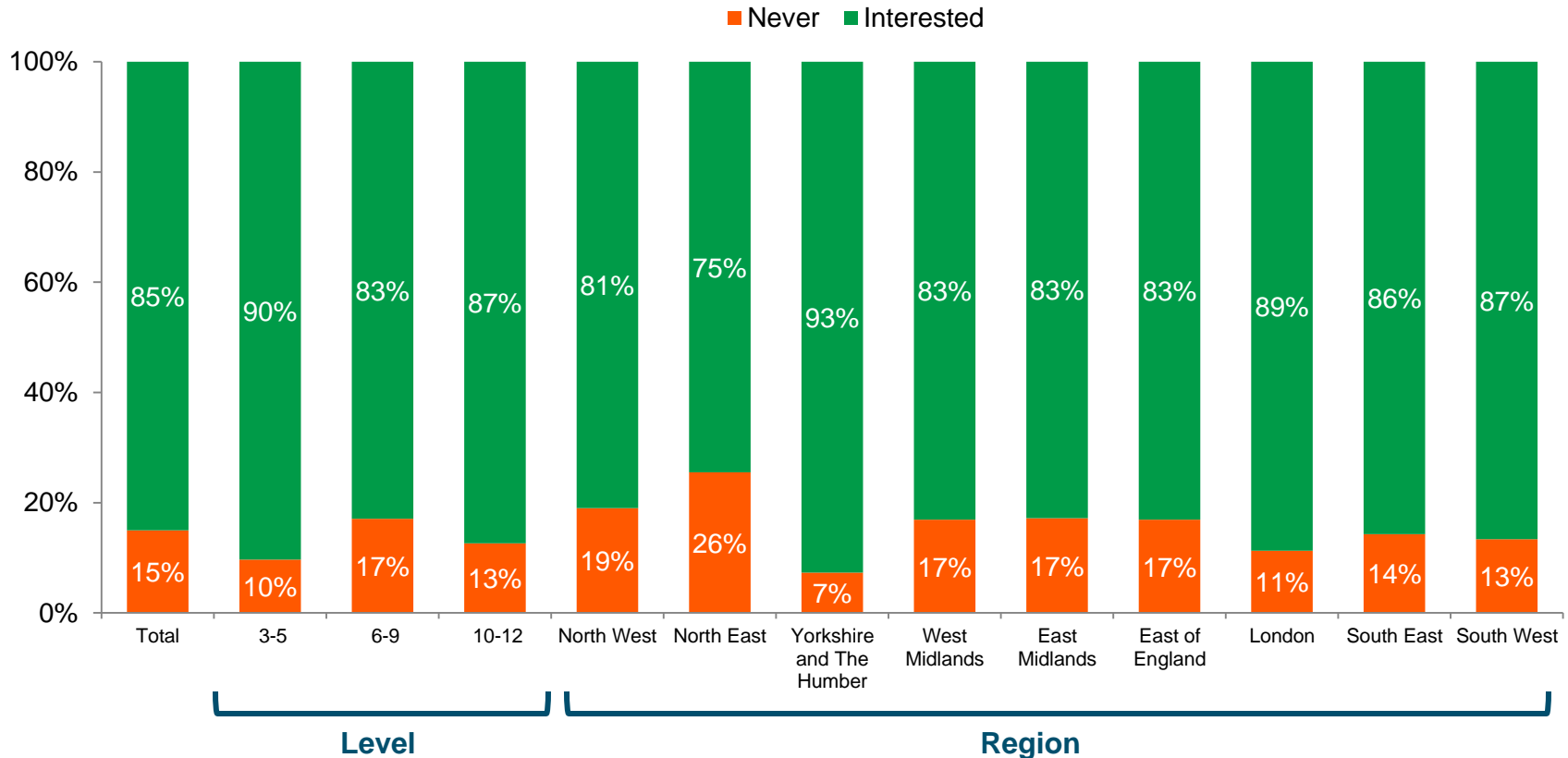
- Highest 'never': North West: 28%
- Lowest 'never': Yorkshire and Humber: 13%



# The difference in level of interest in playing rugby sevens is low across levels and regions

- The greatest interest in rugby sevens is in Yorkshire and Humber (93%), compared to the lowest in the North East (75%)

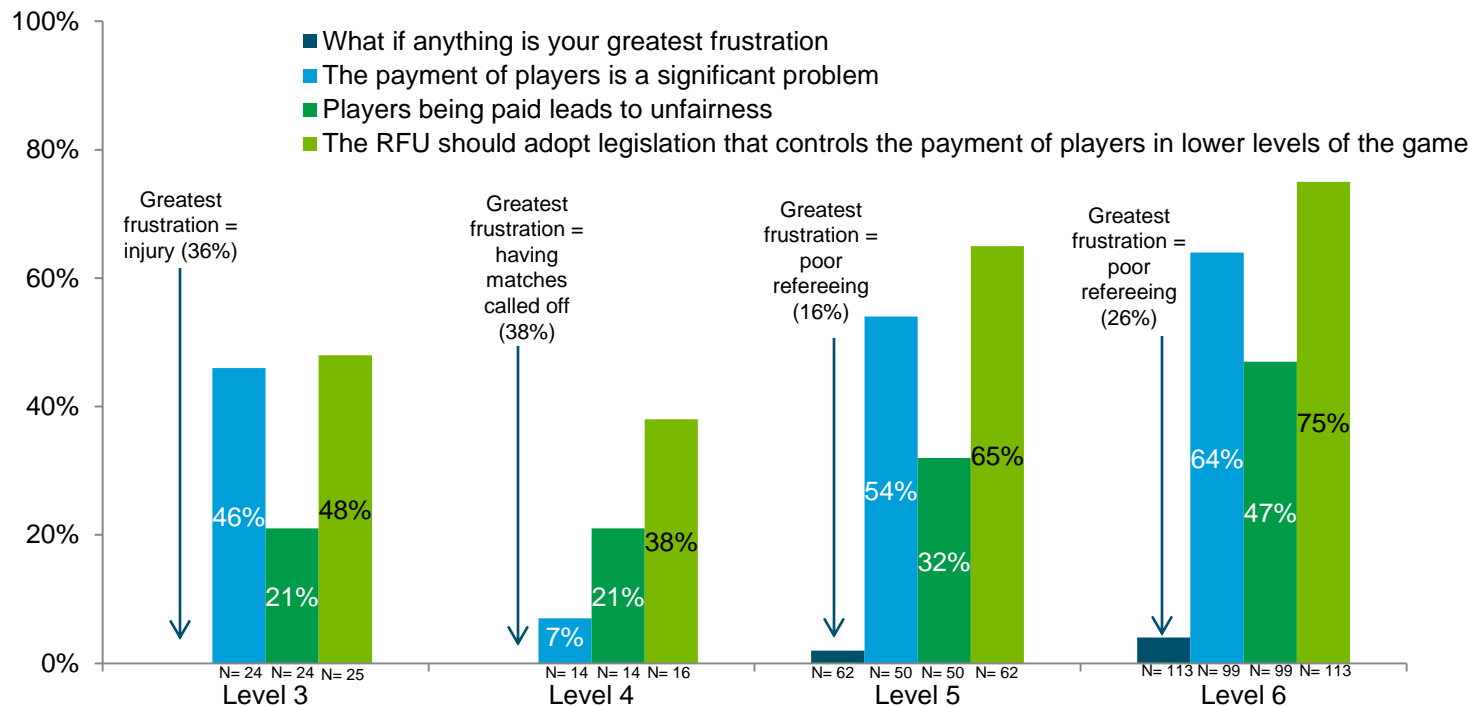
## Willingness to play matches: Sevens



# The trend (low base) suggests that the issue of player payment is of greater concern to players at a lower level

- Player payment is rarely a top of mind frustration for rugby players
- However, it appears that when prompted player payment is of greater concern to players at level 5 and 6

## Player payment





## 5. Key areas of frustration, and barriers to playing rugby

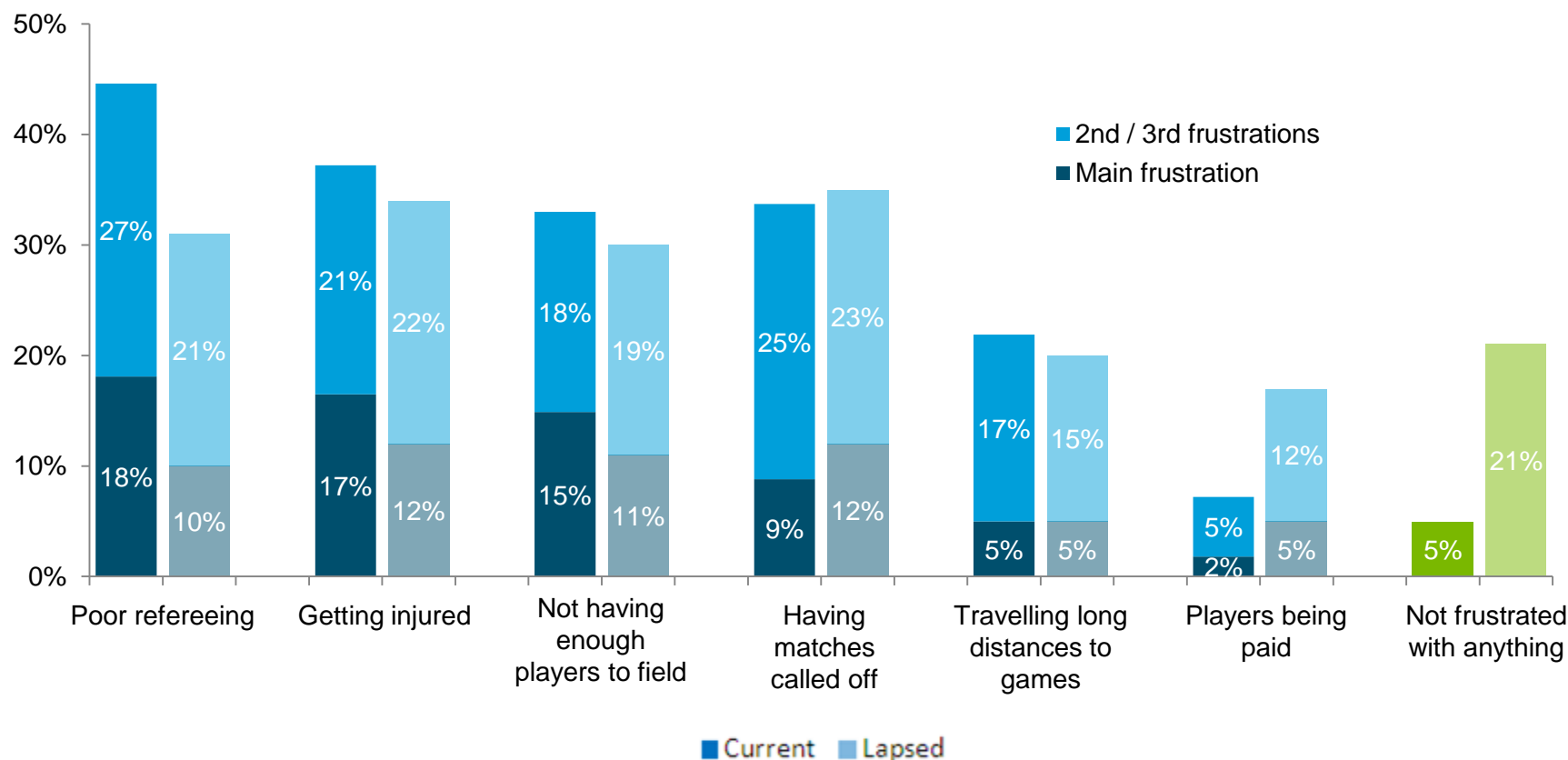




# Players' greatest frustration with rugby is poor refereeing and injury

- Travelling long distances to games is a frustration for around a fifth of current and lapsed players.
- Only 7% of current players said that players being paid is a frustration.

## Frustrations with playing rugby



Q6. and QL5. What, if anything, is/was your greatest frustration with playing rugby? (Single code).

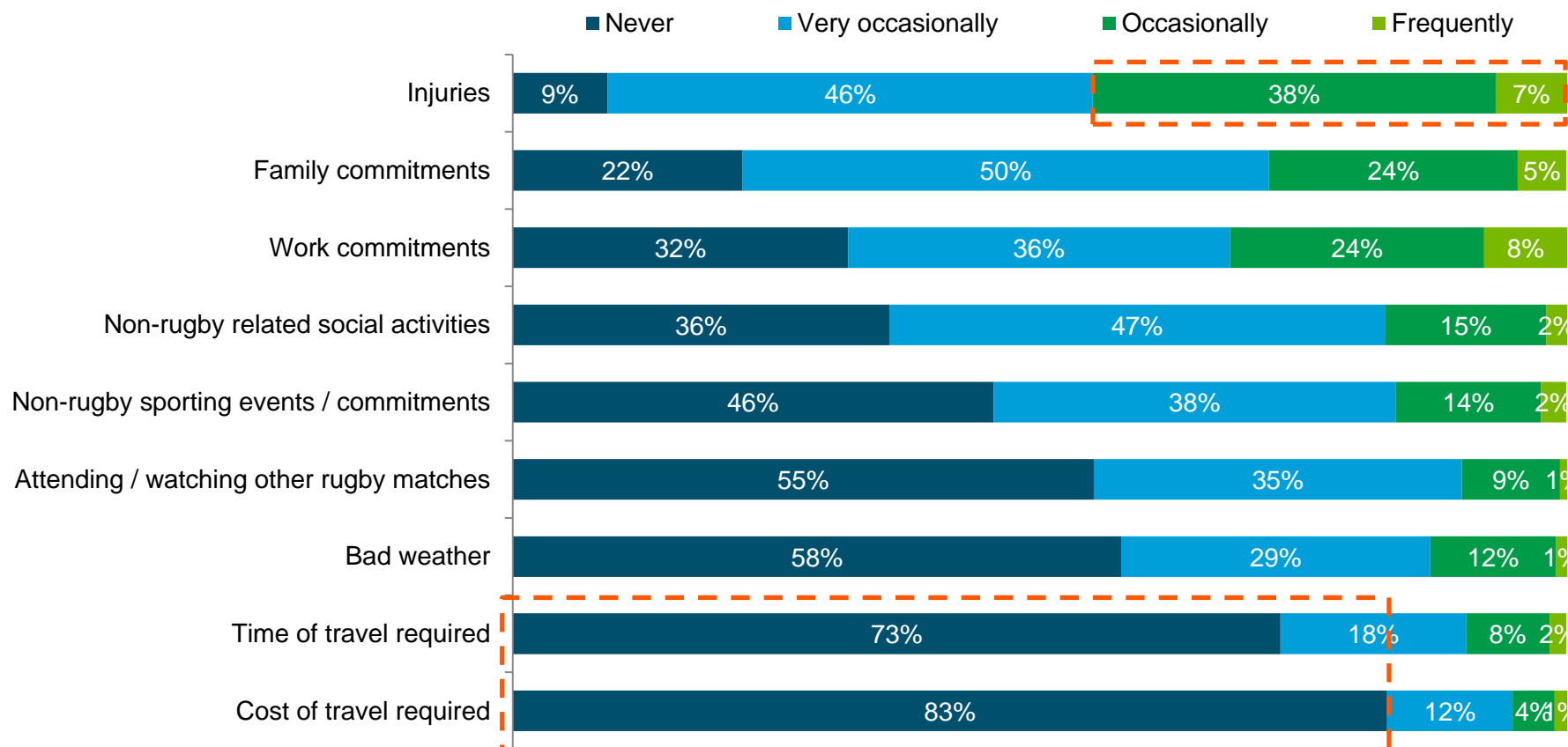
Q7. and QL6. If there are other things that frustrate/d you about playing rugby, please select the next two that most frustrate you. (Double code)

Bases (all current players): 1236, All lapsed players, 586

# Injuries were the most frequent reason for missing matches or training, followed by family and work commitments

- For most players, the time and cost of travel is never a reason to miss a match or training.

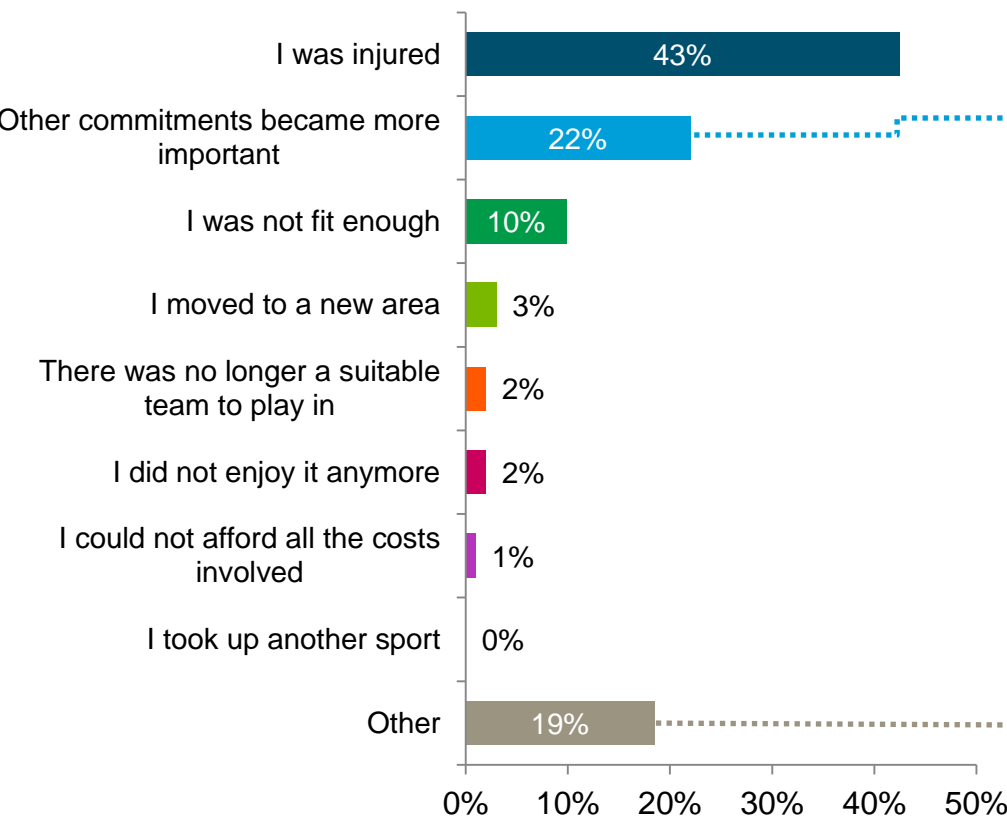
## Reasons for missing matches or training



# Unpreventable issues such as injury, age and illness are the primary reason for retiring from playing rugby

- Other commitments (family and work as opposed to social) were also cited as the key reasons for stopping playing rugby

Reasons for stopping playing rugby



‘Other commitments include’:

- Family commitments: 11%
- Work commitments: 10%
- Other social commitments: 1%

Regional differences

- No major differences noted

Level differences

- No major differences noted

- Age
- Illness
- Moved into refereeing / coaching



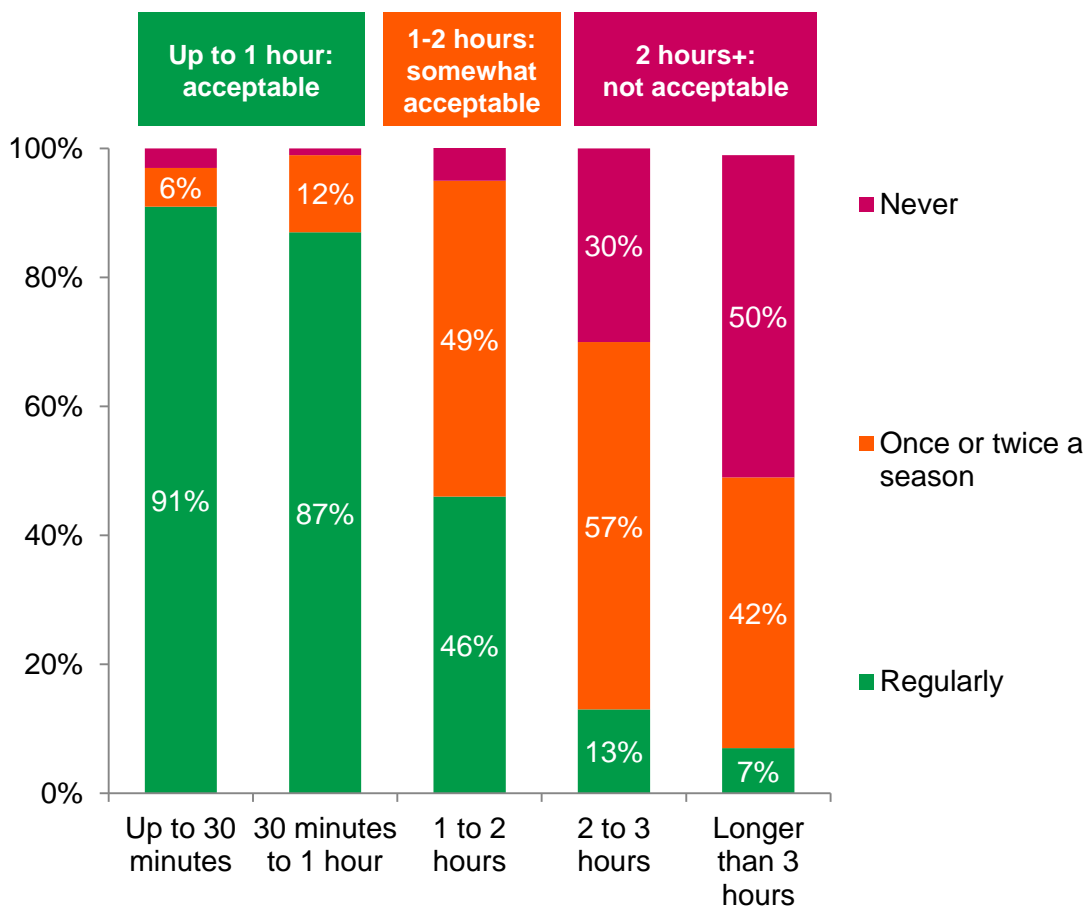


## 6. The impact of time and cost of travel

# In order to ensure fixtures are fulfilled, teams within a league should be within one hour's travel distance of each other

- The majority of current players are prepared to travel up to one hour to away games.
- National level players and those in the North West are more prepared than others to travel greater distances to away games
- 1<sup>st</sup> team players are prepared to regularly travel longer journey times than 3<sup>rd</sup>+ team players.

## Acceptable travel time to away games



## Regional differences

- Across regions players are prepared to undertake similar travel times to away games.
- However, players in the North West are more likely to be prepared to regularly travel greater than two hours compared to all other regions, aside from North East England and Yorkshire & the Humber.

## Level differences

- National level players are more prepared to regularly travel for longer than two hours to away games (two to three hours: 31%; three hours+: 15%) to away games.

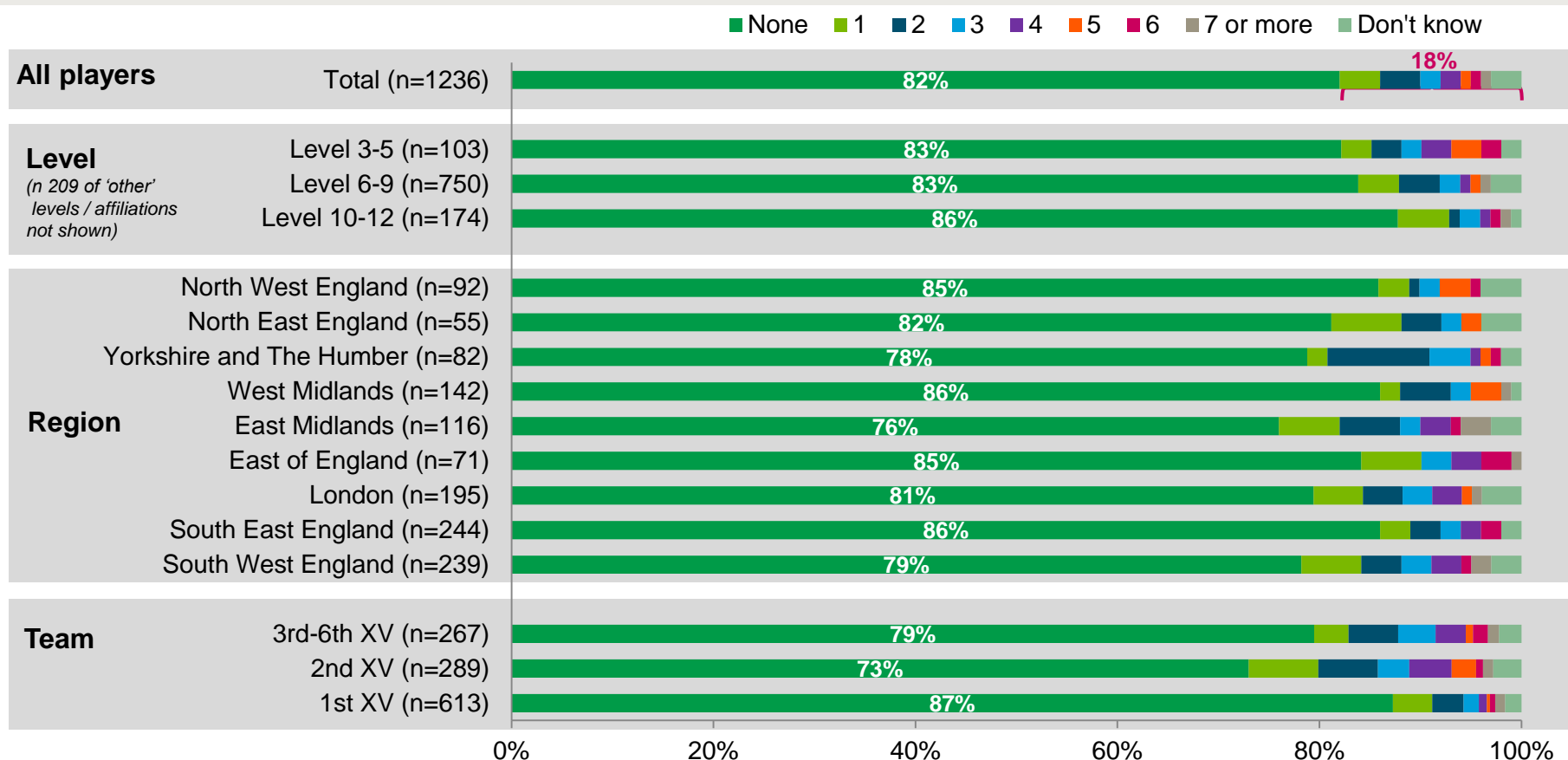
## 1<sup>st</sup> XV vs. other differences

- For 1-2 hours travel, 52% of 1<sup>st</sup> team players are willing to regularly travel for 1-2 hours, compared to 36% of 3<sup>rd</sup> – 6<sup>th</sup> team players
- When it comes to 2-3 hours travel 17% of 1<sup>st</sup> team players are prepared to regularly travel, compared to just 8% of 3<sup>rd</sup>-6<sup>th</sup> team players.

# Only 18% of current rugby players did not play in at least one away match due to excessive travel

- The majority (82%) of current players missed no away games due to travel distance
- This is largely consistent by level of club and by region
- 13% of 1<sup>st</sup> XV games are called off due to travel, compared to 27% of 2<sup>nd</sup> XV and 21% of 3<sup>rd</sup> XV games.

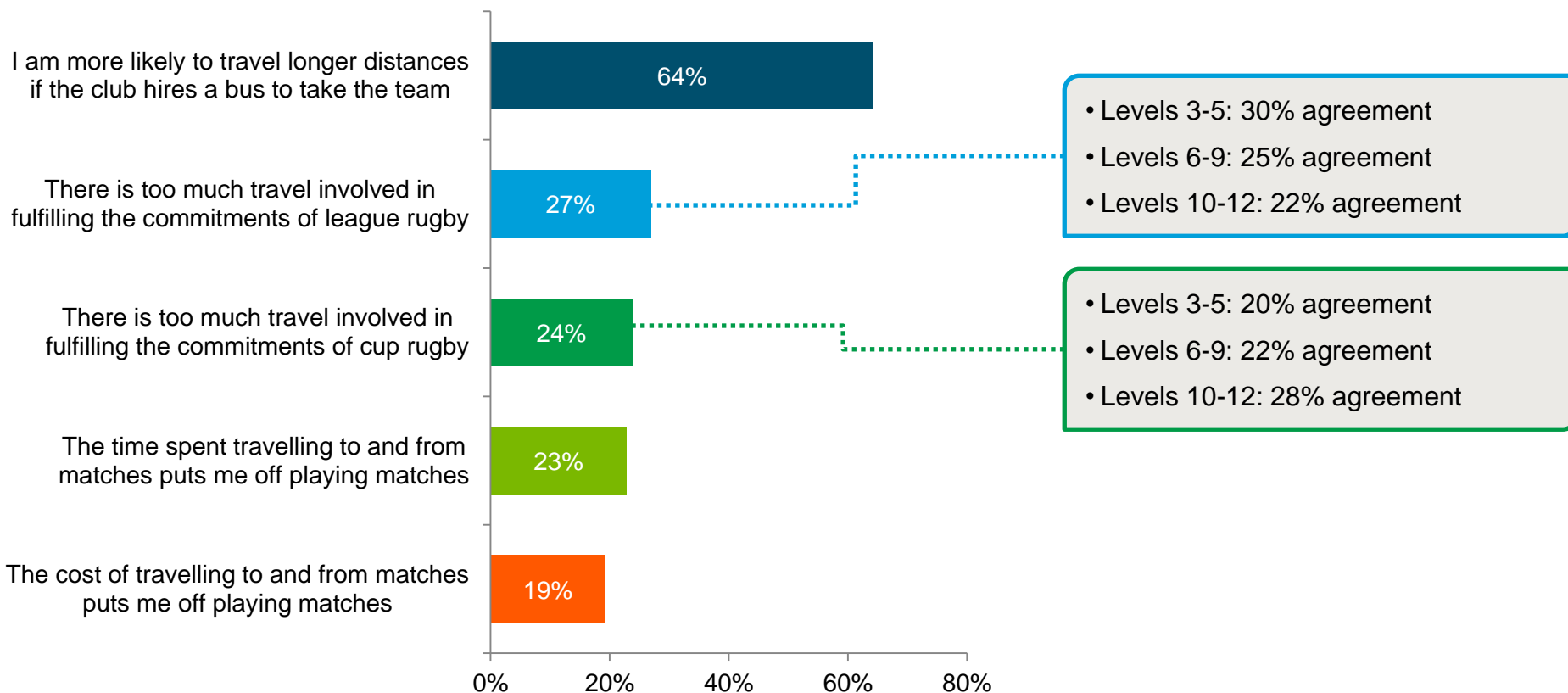
## Number of away games not played in due to travel times



# The players did not have many complaints about travelling

- Only one quarter of players agree with the statements that there is too much travelling involved in fulfilling the commitments of league (27%) and cup (24%) rugby.
- The majority (64%) of players agree that they are 'more likely to travel long distances if the club hires a bus to take them'.

## Travel (NET agreement)







## 7. Appendix

# Two thirds of lapsed players do not want to play rugby again

- Of those who lapsed players who wish to play again, it requires a change in circumstance regarding the issues that prevented them from playing in the first place; recovery from injury or a reduction in other commitments.

**Do NOT want to  
play competitive  
rugby again**

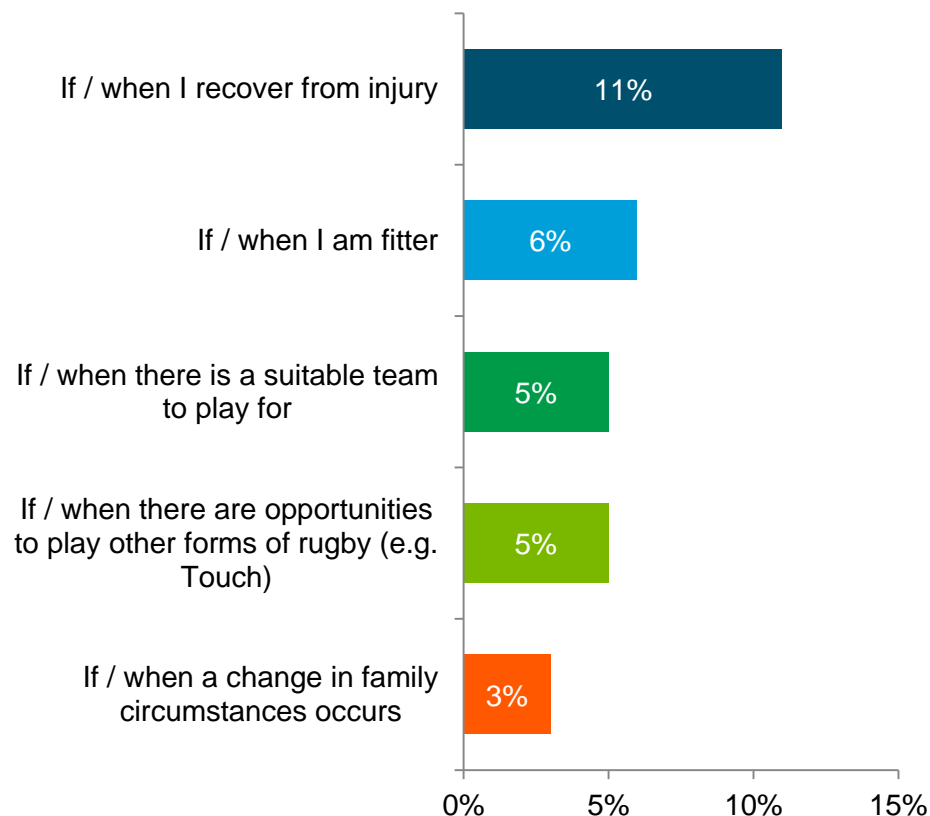
**66%**

**Do want to play  
competitive rugby  
again (no  
differences by  
region or level)**

**34%**

N.B. Only responses over 3% shown. No major differences by region / level

## In which circumstances would you consider playing again?

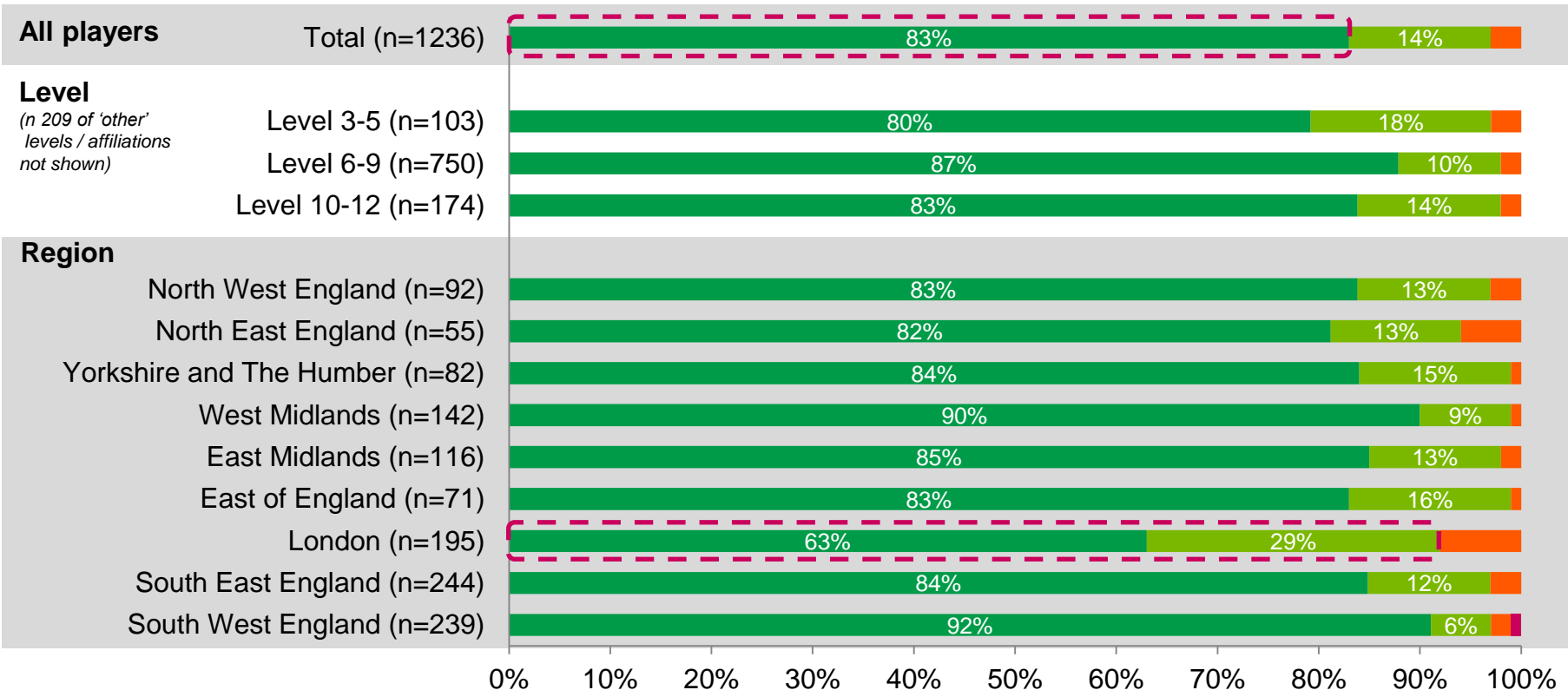


# The vast majority of rugby players are able travel to their club within 30 minutes

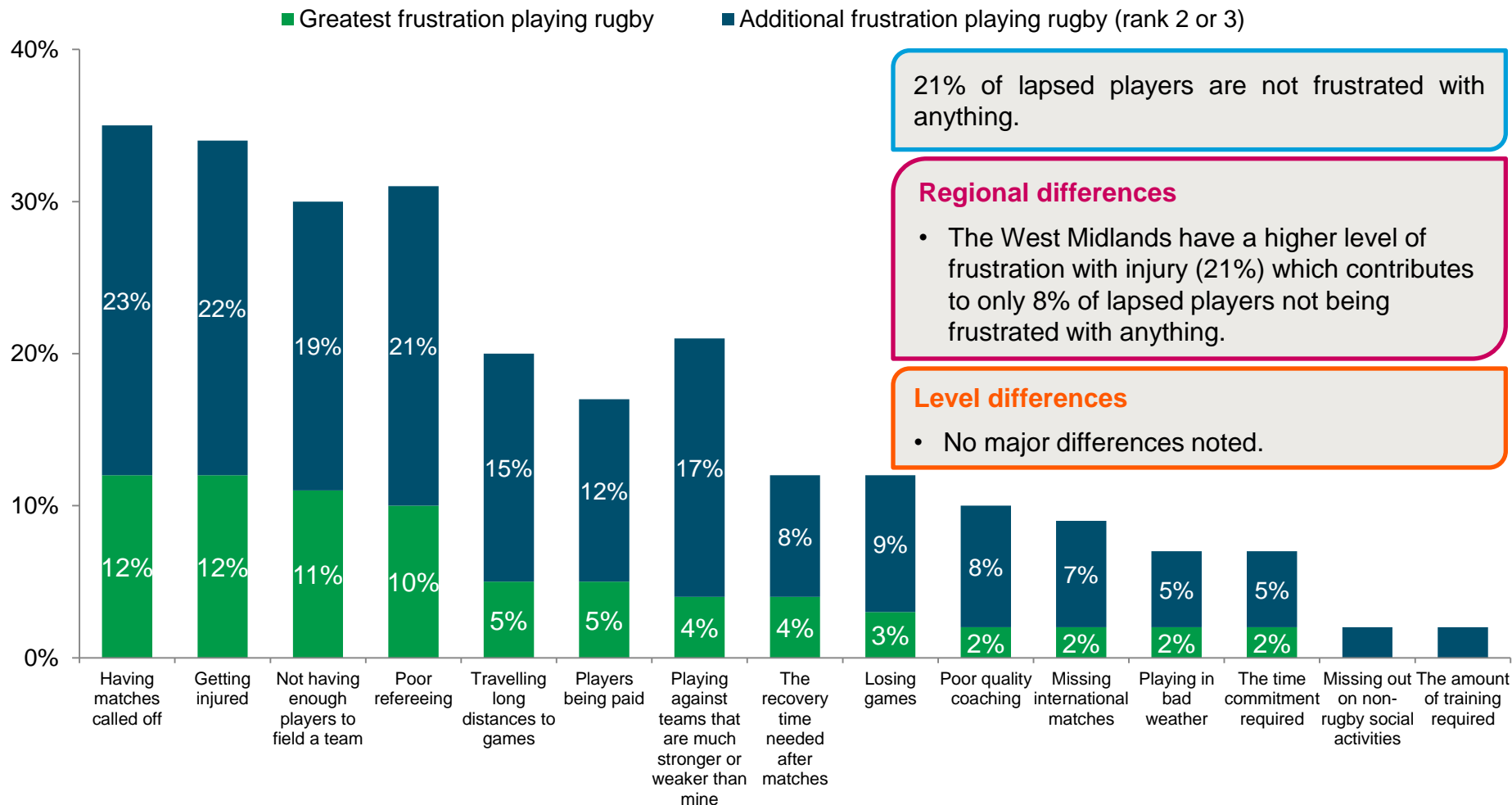
- There are no major differences in travel time by level of club.
- Players from clubs in London are more likely to travel up to an hour (as opposed to 30 minutes) than all other regions.

## Travel time to club

■ Up to 30 minutes ■ 30 minutes to an hour ■ 1 -2 hours ■ 2 hours +



# Matches being called off and injuries, rather than problems such as travel to games and players being paid are considered the key frustrations among lapsed players



QL5 'Whilst playing, what, if anything, was your greatest frustration playing rugby?' (Single code)

Base (all lapsed players): 586

QL6 'If there are other things that frustrated you about playing rugby, please select the next two that most frustrated you?' (Double code)

Base: (all lapsed players who had a frustration with playing rugby): 464

Other and Don't Know not shown