



England
Rugby

16/17TH SEP 2022

COMMUNITY GAME CONGRESS



PROGRAMME

DAY 1

- WELCOME & INTRODUCTION
- CONTACT/NON - CONTACT INSIGHTS:
WHERE ARE WE/WHERE ARE WE HEADING?
- CONTACT PANEL
- NON-CONTACT PANEL

DAY 2

- CLUB OF THE FUTURE INSIGHTS
- CLUB OF THE FUTURE PANEL
- REFLECTIONS & WRAP UP



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WELCOME

NIGEL GILLINGHAM: RFU PRESIDENT

TOM ILUBE: RFU CHAIR

BILL SWEENEY: RFU CHIEF EXECUTIVE OFFICER

SUE DAY: RFU CHIEF OPERATIONS OFFICER/CHIEF FINANCIAL OFFICER

STEVE GRAINGER: RFU DIRECTOR OF RUGBY DEVELOPMENT

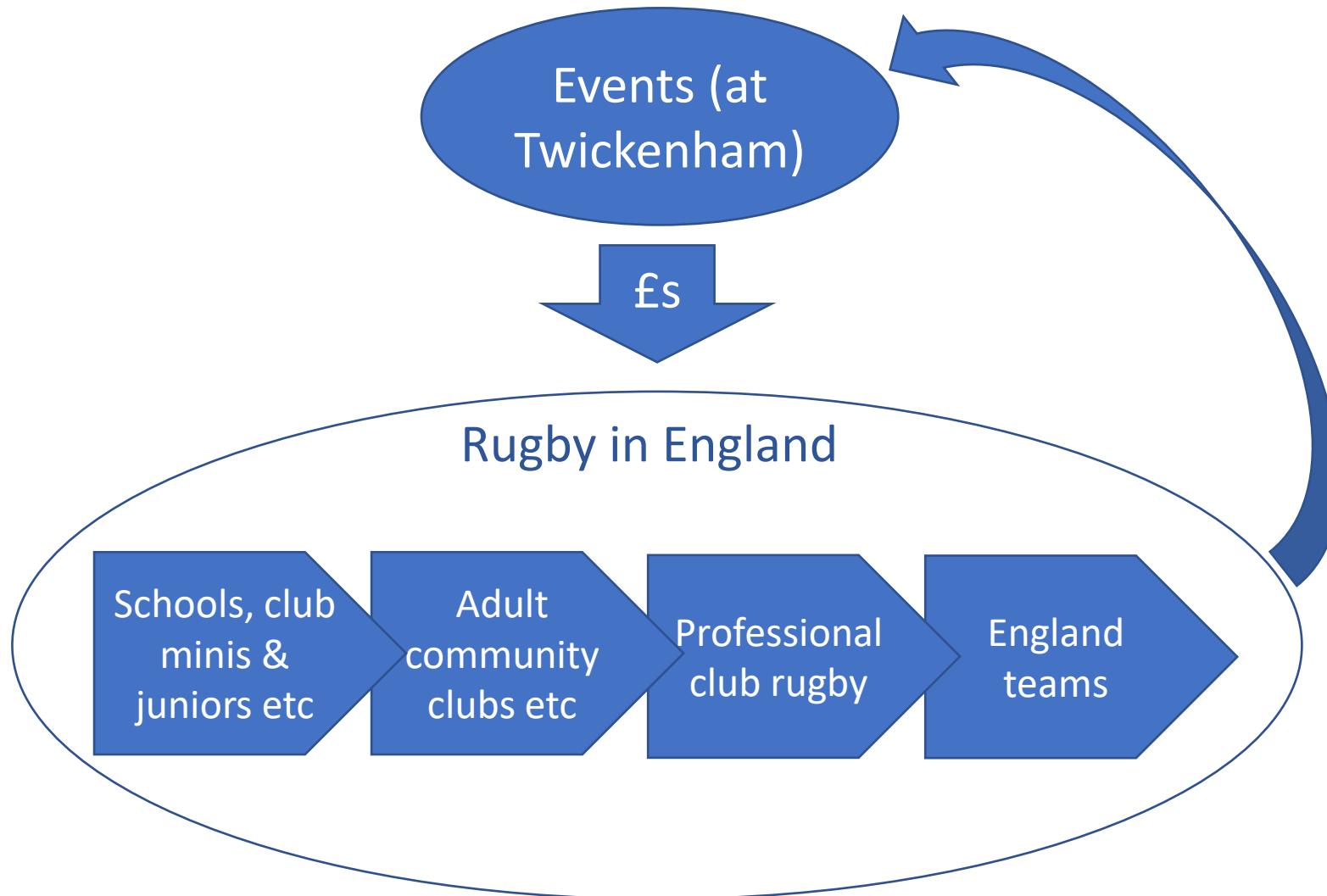


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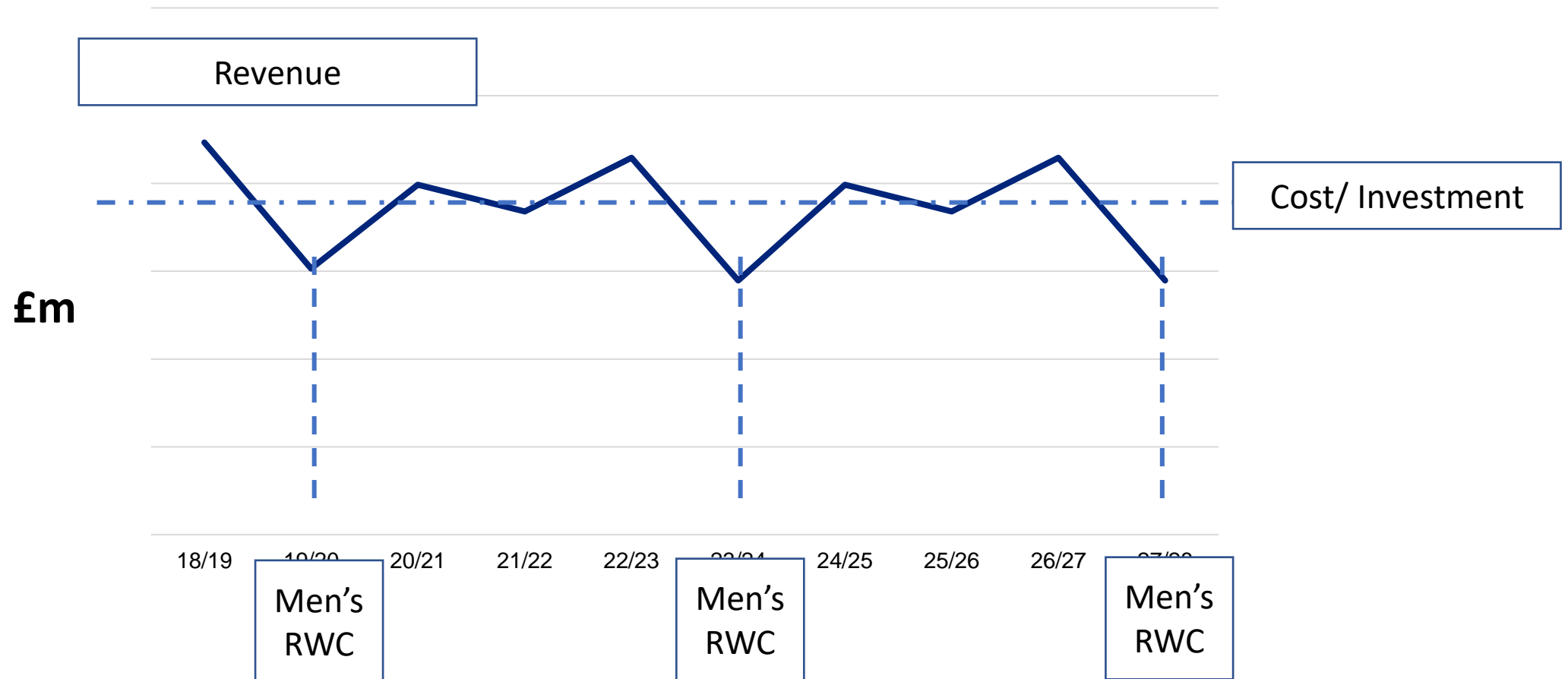
ENGLAND RUGBY BUSINESS MODEL (AND INVESTMENT INTO COMMUNITY RUGBY)

**Sue Day
September 2022**

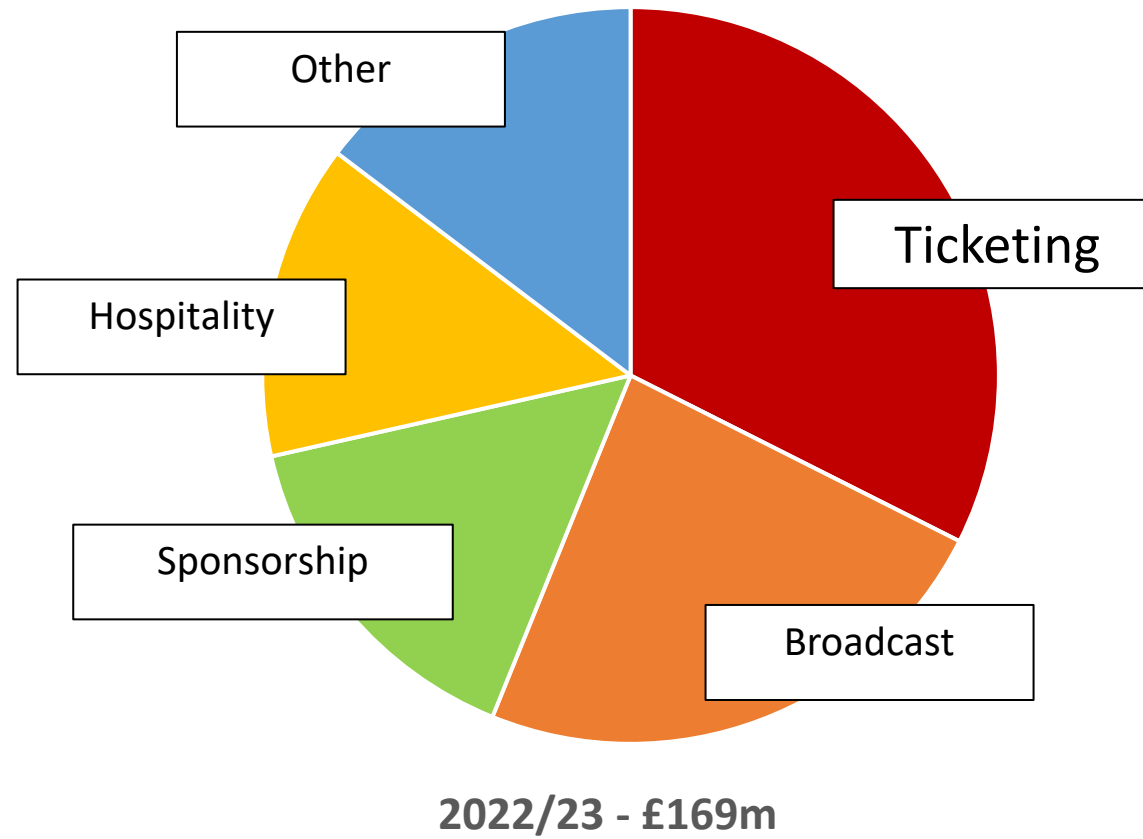
The business model



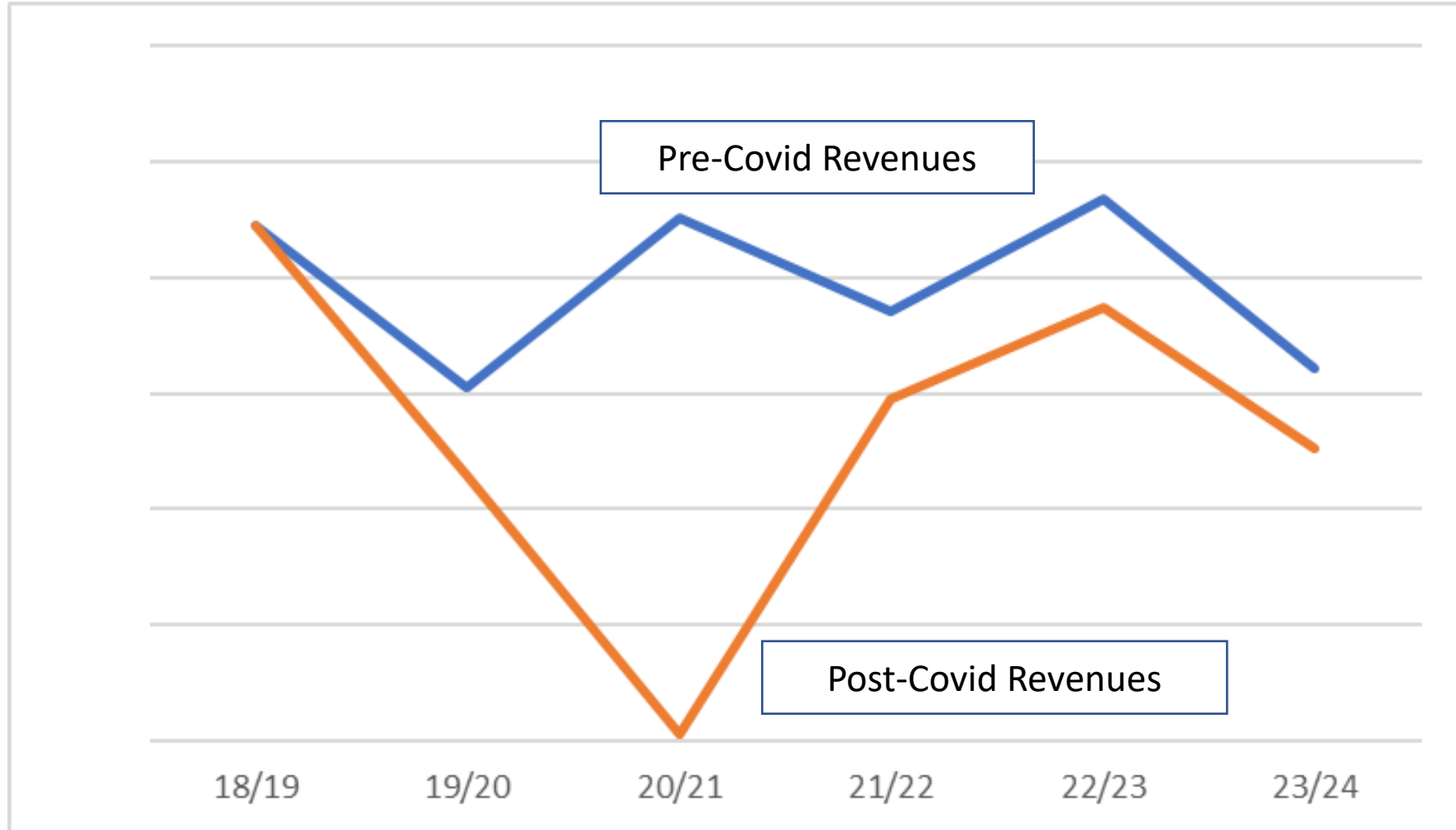
RFU Revenue



Revenues



Covid Impact on Revenues



**WHAT DO WE
SPEND IT
ON?**



**England
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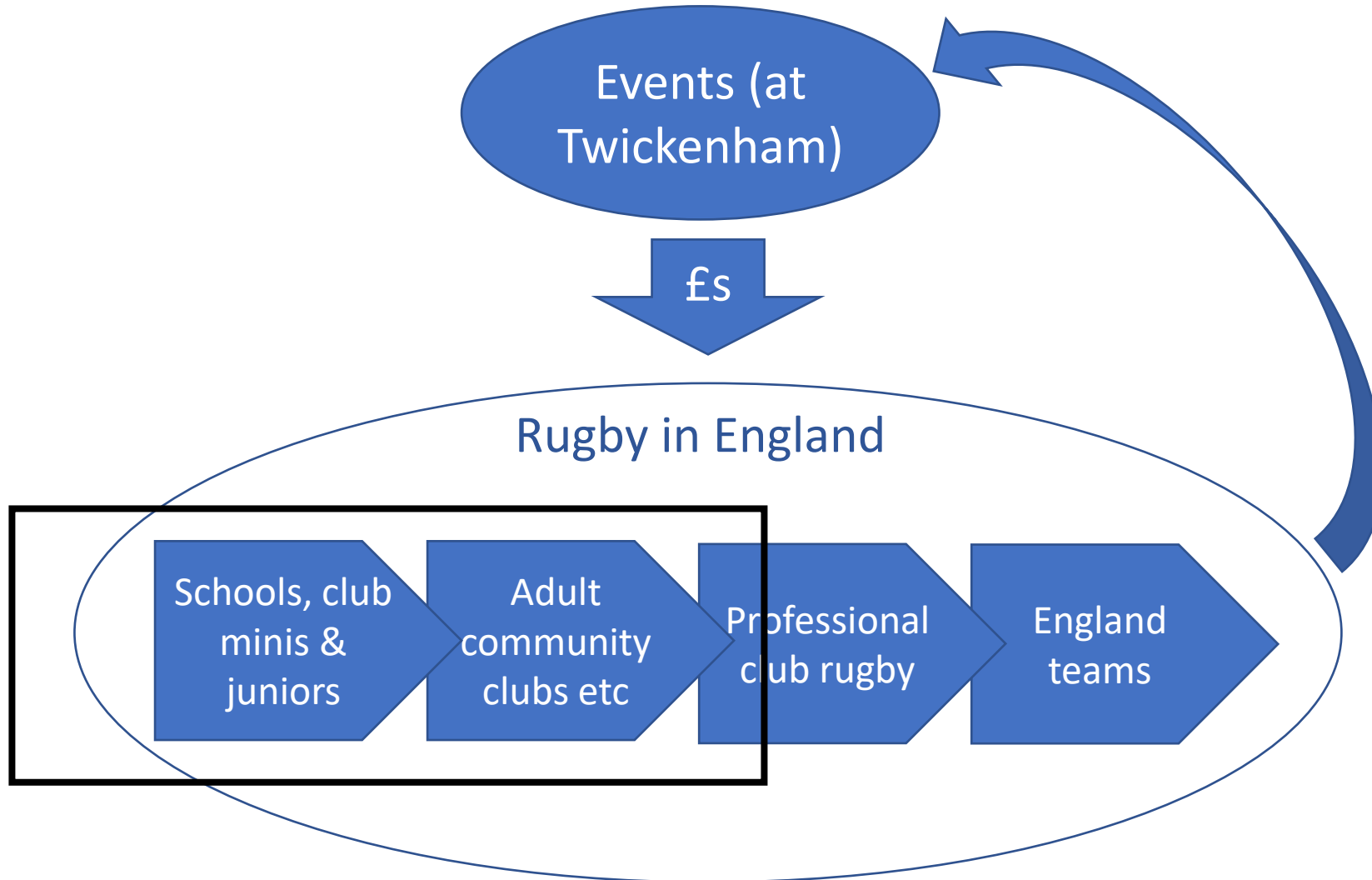
ENGLAND RUGBY STRATEGIC PLAN



OUR PURPOSE:

TO ENRICH LIVES, INTRODUCE MORE PEOPLE
TO RUGBY UNION AND DEVELOP THE
SPORT FOR FUTURE GENERATIONS.

'Community' investment





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COMMUNITY GAME FUTURE

IMMEDIATE AND LONGER TERM

Steve Grainger
September 2022



ADULT

MEN: RECOVERY PLAN
WOMEN: REBOOT GROWTH



AGE GRADE

MONITOR AFFILIATION
NUMBERS



CLUBS

ASSESS & REACT TO COST
OF LIVING IMPACT

NEXT 18-24 MONTHS



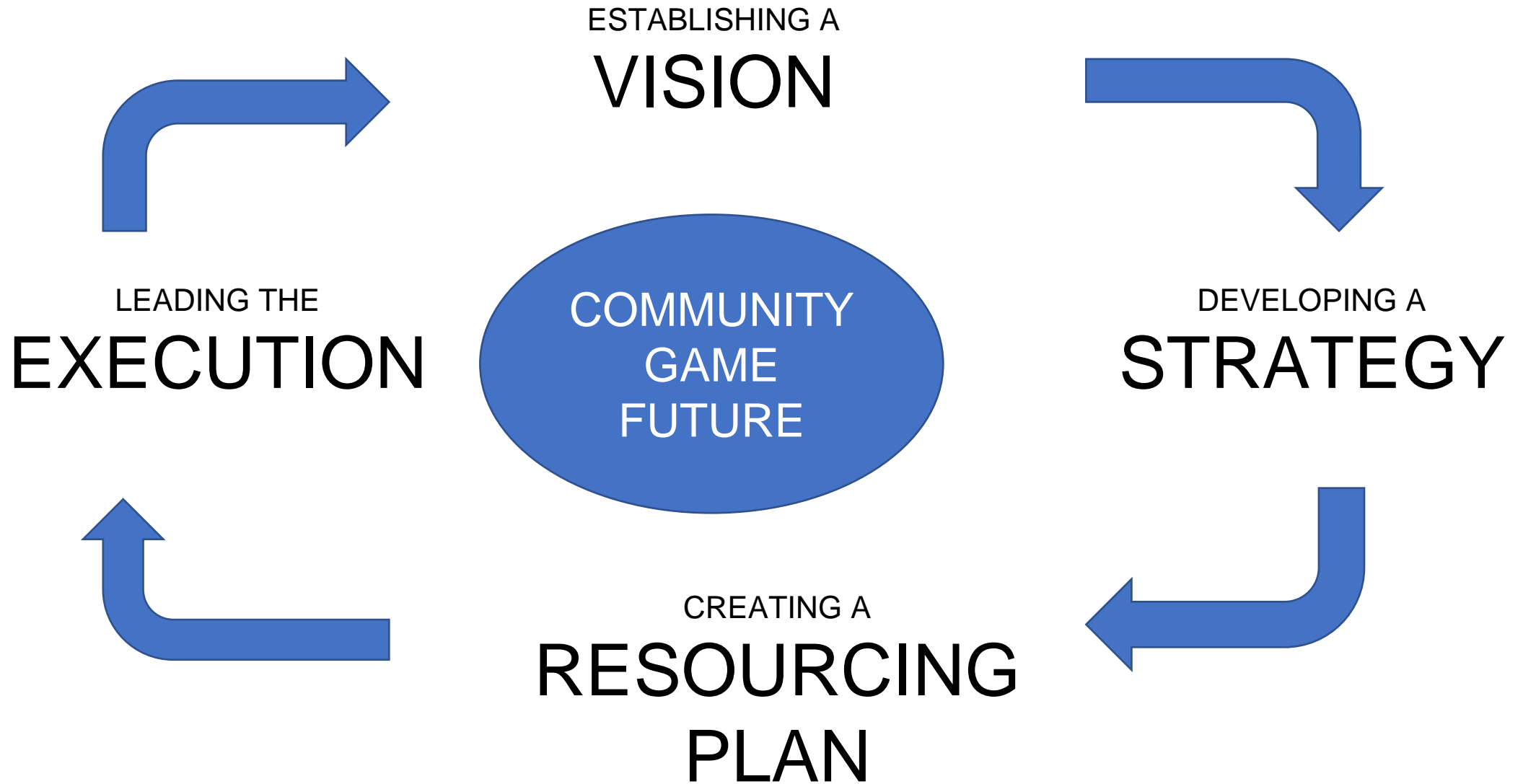
RE-IMAGINING & RE-PLOTTING THE COMMUNITY GAME

WHY ARE WE DOING THIS?



TO ENABLE RUGBY UNION TO STAY STRONG AND ENGAGE MORE PEOPLE IN A RAPIDLY CHANGING MARKETPLACE

- A CONSTANTLY CHANGING SOCIETAL & SPORTING LANDSCAPE – WE NEED TO STAY ON TOP OF THIS
- SIGNIFICANT CHANGE IN OUR GAME OVER THE LAST DECADE (ACCENTUATED DURING, AND POST, COVID)
- A RAPIDLY SHIFTING BALANCE IN OUR GAME – CONTACT/NON-CONTACT & MALE/FEMALE
- A GREATER EXPECTATION THAT WE WILL BRING ALIVE OUR WELFARE & INCLUSION STRATEGIC OBJECTIVES
- PREMIERSHIP (& APXVs COMING) ACTIVE IN THE COMMUNITY SPACE – OPPORTUNITY TO ALIGN?
- VOLUNTEERS STRETCHED – NEED TO ENSURE WE MAXIMISE AND FOCUS EFFORT – NOT BURN IT OUT
- ENSURE OUR FUTURE INVESTMENT IS MAXIMISED & OTHER OPPORTUNITIES REALISED
- OPPORTUNITY FOR US ALL TO BE REALLY CLEAR & PRIORITISED ABOUT OUR ROLE IN THE ECOSYSTEM



STEP ONE: ESTABLISHING A VISION (BY END 2022)

Re-imagining the community game

IDEAS

ISSUES, IDEAS, DATA & INSIGHT

ESTABLISHING PRINCIPLES

(NOW)

CONSENSUS

GAME CONGRESS

WHAT, WHO, WHERE, WHEN

(SEPTEMBER)

ENDORSEMENT

*SOCIALISATION WITH THE GAME
AND BEYOND IT*

(OCT-DEC)

EXAMPLES OF BIG TICKET DISCUSSIONS



- **WHO WILL BE PLAYING OUR GAME IN 10 YEARS TIME - NUMBER OF PARTICIPANTS, FROM WHAT DEMOGRAPHICS**
- **WHAT FORMATS OF THE GAME WILL WE BE PLAYING - CONTACT, NON-CONTACT (COMPETITIVE/RECREATIONAL/SOCIAL)**
- **WHERE WILL OUR GAME BE PLAYED - CLUBS, SCHOOLS, OTHER**
- **WILL WE HAVE MORE/LESS CLUBS - WILL THE NORM BE FOR CLUBS TO COLLABORATE & SHARE SERVICES**
- **WILL STANDALONE RUGBY CLUBS EXIST OR WILL MULTI-ACTIVITY/MULTI-SPORT BE THE NORM**

STEP TWO: DEVELOPING A STRATEGY (JAN-JUNE 2023)

Priorities & Deliverables



PRIORITIES

*DETERMINING KEY INTERVENTIONS
TO DELIVER AGAINST THE VISION*



OPTIONS

*OPTIONS ANALYSIS ON KEY
INTERVENTIONS, DELIVERY
SYSTEMS & FUNDING MODELS*



DELIVERABLES

*CLEAR PLAN FOR NEXT 5-10 YEARS -
WITH OPTIONS FOR SCALABILITY*

STEP THREE: CREATING A RESOURCING PLAN (JULY-DEC 2023)

Financial & Human Resourcing



INVESTMENT

***BUSINESS CASE & EXTERNAL
FUNDING OPPORTUNITIES***



PEOPLE

***MOST EFFECTIVE DEPLOYMENT OF
STAFF & VOLUNTEERS***



DELIVERY PLAN

***CLEAR PLAN FOR NEXT 5-10 YEARS -
WITH OPTIONS FOR SCALABILITY***

STEP FOUR: LEADING THE EXECUTION (JAN 2024 ONWARDS)

Delivery, Accountability & Review



DELIVERY

CLEAR PLANS WITH MILESTONES & TARGETS



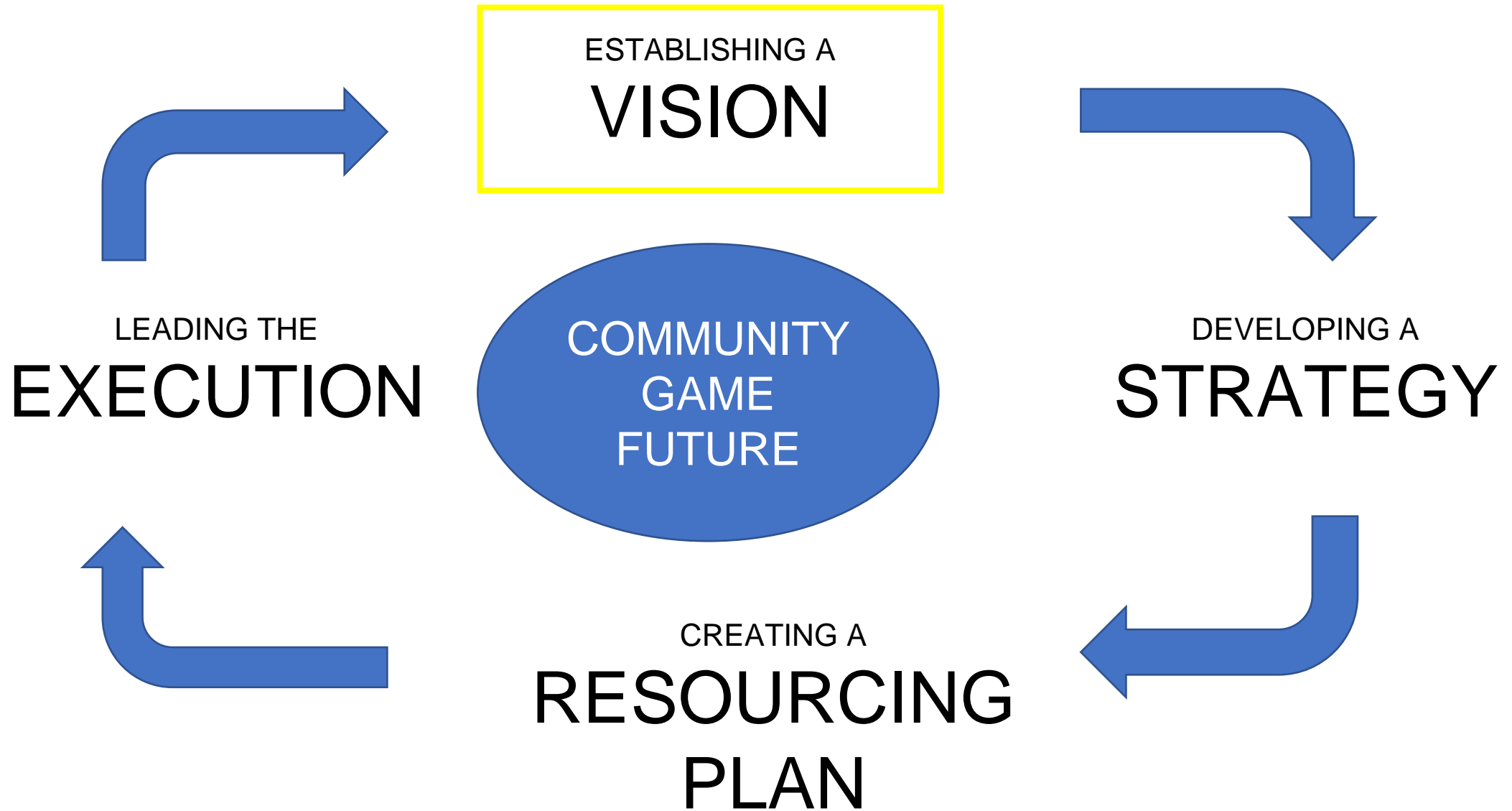
ACCOUNTABILITY

OVERSIGHT & GOVERNANCE OPTIONS & MODELS



REVIEW

MECHANISMS FOR REVIEW & CHANGES





CURRENT INSIGHTS CONTACT/NON-CONTACT GAME

DAVID ROBERTS: CHAIR OF COMMUNITY GAME BOARD

BEN LOWE: HEAD OF PLAYER EXPERIENCE, RFU

CURRENT STATE INSIGHTS: CONTACT AND NON-CONTACT GAME

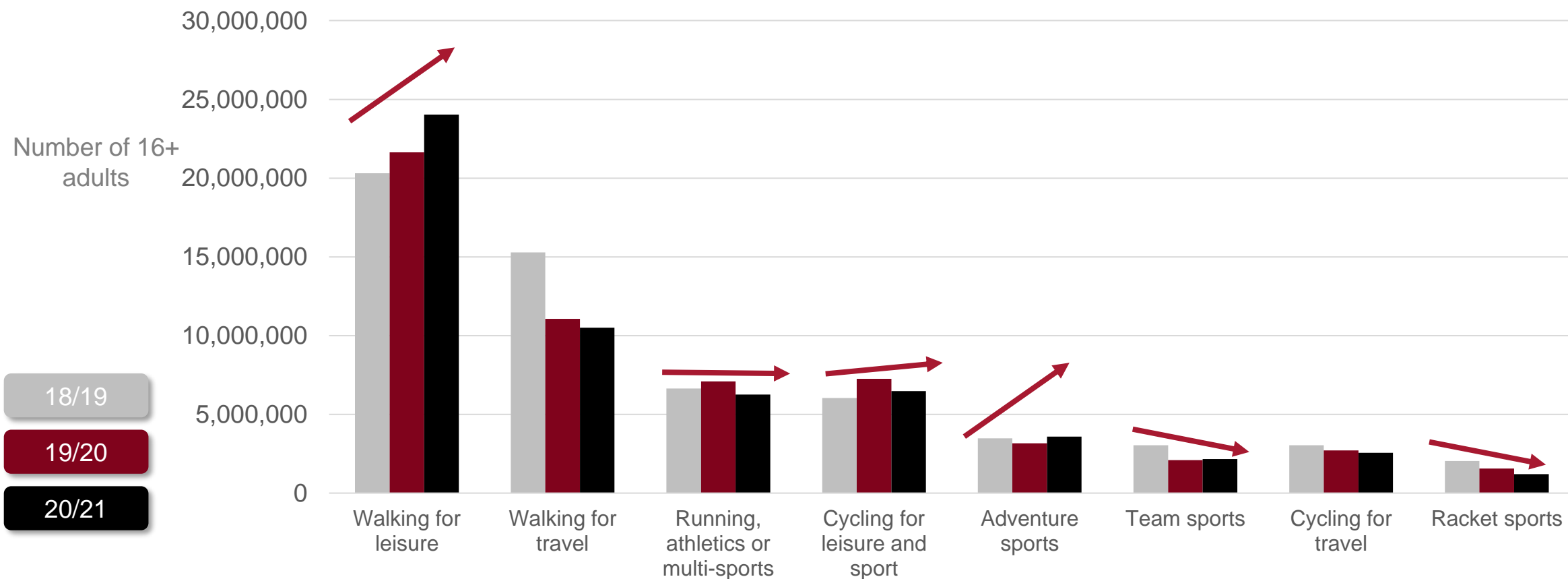


Rugby recovering more slowly than other team sports

MORE competition from flexible and individual Sports and other leisure pursuits

YEAR ON YEAR TRENDS BY ACTIVITY GROUPS

Team sports numbers have been impacted significantly by the pandemic but have now settled. Whereas individual sports such as cycling and running appear to be returning to pre pandemic levels, they also saw significant uplifts with as the only/main forms of activity during lockdowns – continuing a pre-pandemic trend towards more individual sports



CURRENT STATE INSIGHTS: CONTACT AND NON-CONTACT GAME



Rugby recovering more slowly than other team sports

MORE competition from flexible and individual Sports and other leisure pursuits



Female participation growing again

Age grade club rugby holding up well

decrease in adult male players and frequency of play

DECLINE IN VOLUME AND COMPLETION RATES FOR ADULT MALE MATCHES



% of all players playing this number of matches	0-5 matches	6-10 matches	11-15 matches	16-20 matches	20+ matches
2018/19	40%	20%	18%	15%	6%
2019/20	45%	22%	18%	11%	4%
2021/22	48% ↑	23% ↑	17% ↓	10% ↓	3% ↓

Competition Name	Resulted			21/22 vs 18/19 actual change
	2018-2019	2019-2020	2021-2022	
Middlesex Merit Tables	74%	85%	61%	-13%
	380	422	299	-21
Hertfordshire & Middlesex Merit Tables	52%	71%	64%	12%
	312	337	318	2
Surrey County Leagues 2021-2022	66%	75%	63%	-3%
	545	563	558	2
Midlands Reserve Team Leagues	71%	58%	51%	-20%
	294	193	178	-39
Lancashire County Rugby Union Leagues	95%	79%	69%	-26%
	171	182	376	120
HALBRO North West Leagues	74%	66%	55%	-19%
	1493	1255	946	-3664%
Yorkshire League & Merit Tables	73%	74%	64%	-9%
	730	546	489	-3301%
HALBRO NW Colts Leagues	76%	77%	68%	-8%
	435	272	282	-3517%
Dorset & Wilts U18	67%		66%	-1%
	18		61	239

Source: GMS – NB resulted matches only (excludes liquidated etc– top line is % completion and bottom line is actual volume of matches to 7/8th May

CURRENT STATE INSIGHTS: CONTACT AND NON-CONTACT GAME



Rugby recovering more slowly than other team sports

MORE competition from flexible and individual sports and other leisure pursuits



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Age grade club rugby holding up well

decrease in adult male players and frequency of play



Academic pressure

concerns about rugby physicality

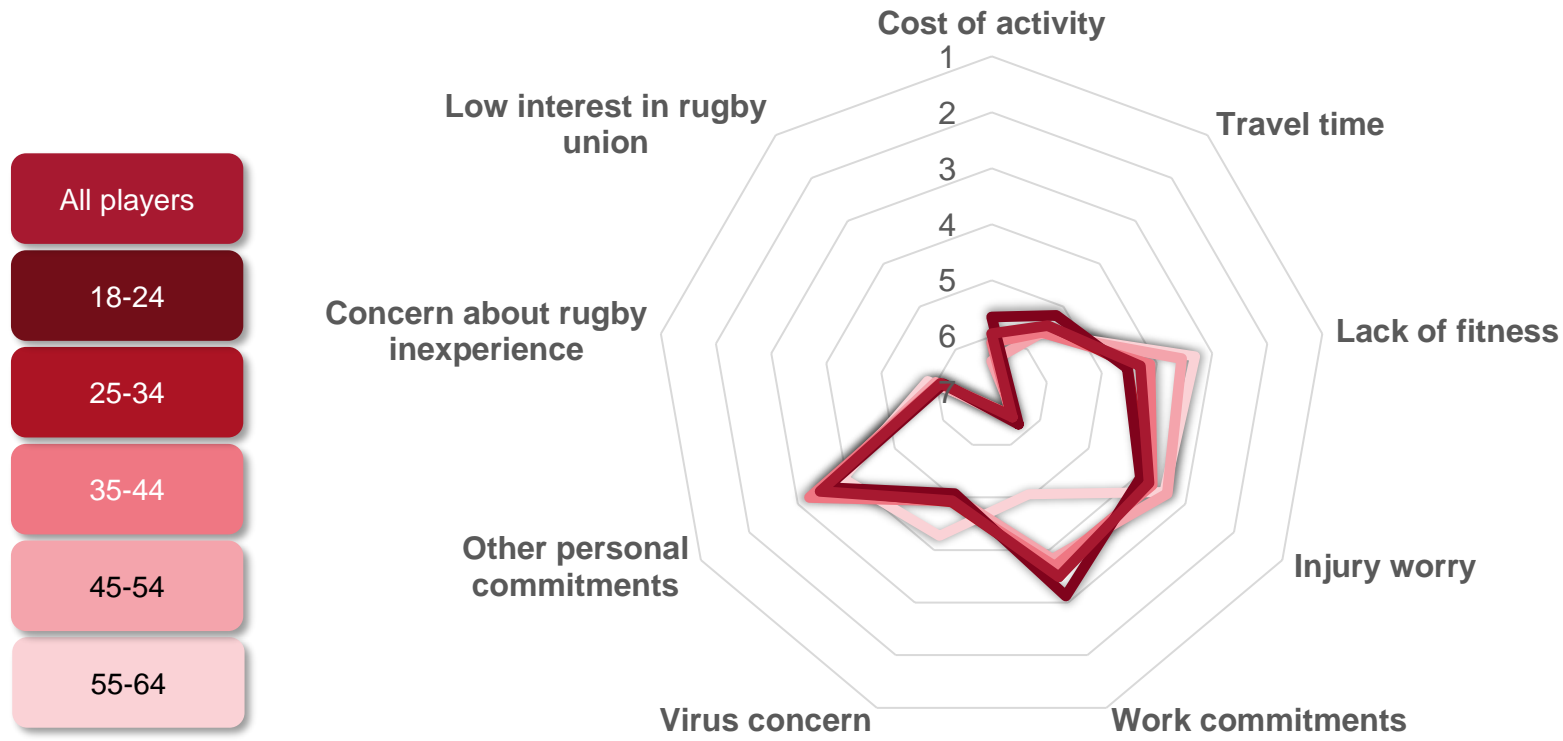
Both driving younger players to drop out

BARRIERS TO RETENTION BY AGE

Lack of fitness & the risk of getting injured is a concern

What is most likely to stop you playing rugby after COVID and what is least likely?

Rank from 1-9, where 1 is most likely to stop you playing



- The survey & 8 focus groups helped us identify the 3 at risk groups early in summer:

- Front 5 forwards
- Social XV players
- Older Age Grade players

CURRENT STATE INSIGHTS: CONTACT AND NON-CONTACT GAME



**Interest in non-contact
rugby is strong for
young people**

**1m 10-18 YEAR OLDS
INTERESTED TO PARTICIPATE
IN non-contact BUT ALSO
600k interested IN
contact RUGBY**

- PRESSURE FROM PARENTS AND

Interest in full & non-contact Rugby Union

Interest in full contact

614,700 non-players
39,700 lapsed players

Increase opportunity to play

Interest in non-contact

1.06m non-players
40,800 lapsed

Introduce non-contact offering

CURRENT STATE INSIGHTS: CONTACT AND NON-CONTACT GAME



THE TOUGH
UNION

**Interest in non-contact
rugby is strong for
young people**

**1m 10-18 YEAR OLDS
INTERESTED TO PARTICIPATE
IN non-contact BUT ALSO
600k interested IN
contact RUGBY**



**Concerns around
physicality and injury
remain for some
teenagers**

- PRESSURE FROM PARENTS AND

PERCEIVED PHYSICALITY AND POTENTIAL FOR INJURY REMAIN A BARRIER TO PLAYING RUGBY UNION FOR MANY YOUNG PEOPLE



- Low knowledge and familiarity of the game for many non-players means they rely on:
 - What they have seen of the professional/international game
 - Anecdotal stories from friends/peers
- This is shaping their perceptions of Rugby Union, which they associate with:
 - Injury/getting hurt (over 1 in 10 mentioned spontaneously)
 - Being “rough” (1 in 10 mentioned spontaneously)

“...I just feel it's for a **different type of person** who's got **more power** behind them.”
Female, Year 9

“I enjoy rugby quite a bit but...it's just the **danger** side of it ...
But I think my last rugby game I played, the one that **really threw me off rugby** was I was just playing a casual game ...
and I ended up **really hurting my leg** and that, kind of, just changed my outlook
Male, A-level student

CURRENT STATE INSIGHTS: CONTACT AND NON-CONTACT GAME



Interest in non-contact rugby is strong for young people

1m 10-18 YEAR OLDS INTERESTED TO PARTICIPATE IN non-contact BUT ALSO 600k interested IN contact RUGBY



Concerns around physicality and injury remain for some teenagers



REPORTS OF DECLINING ACTIVITY IN SCHOOLS

MORE DIVERSITY OF TEACHERS / PUPILS MEANS RUGBY IS NEWER to some

PRESSURE FROM PARENTS AND governors

TABLE DISCUSSION: RUGBY UNION IN 10 YEARS TIME



1. What insights and trends have you noticed that we need to be aware of?
2. What are your hopes and fears for the game in 5-10 years?
3. What might the wants and needs of the players of tomorrow be?



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CONTACT PANEL

KEITH BATEMAN: EAST MIDLANDS RUGBY UNION

BECKY WILLIAMS: STAFFORDSHIRE RUGBY UNION

ELEANOR ADDISON: RFU NATIONAL YOUTH COUNCIL

PAULA BRADBURY: CHESHIRE RFU

CONTACT PANEL

To mitigate the risk of unnecessary head impacts it is likely there will be changes to how the game is played, coached and officiated. Contact training loads may need to be reduced to the minimum required to prepare players to play.

There will be an expectation that coaches and referees are trained to provide safe and effective contact rugby

To maximise opportunities for players who want to play contact rugby matches will be scheduled across the week on different days and times

There will be much greater use of Game On / modified contact rugby below 1st XV





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NON-CONTACT PANEL

JAMES COOK: RFU BOARD/ARMY RUGBY UNION

PENNY STEWART: NORTHUMBERLAND RUGBY UNION

JOHN HOLE: ENGLAND COLLEGES

JORDAN YOUNG: TRINITY GUILD RFC

NON-CONTACT PANEL

Non-contact on offer in its own right as a lifelong, year-round activity

Non-contact to be offered in the majority of schools and regularly used by teachers to introduce the game to young people

Walking Rugby integrated into non-contact offering to encourage mixed gender and inter-generational opportunities

Competitive opportunities common place across clubs, schools, colleges and universities

Support to be made available for coach and referee non-contact training and deployment





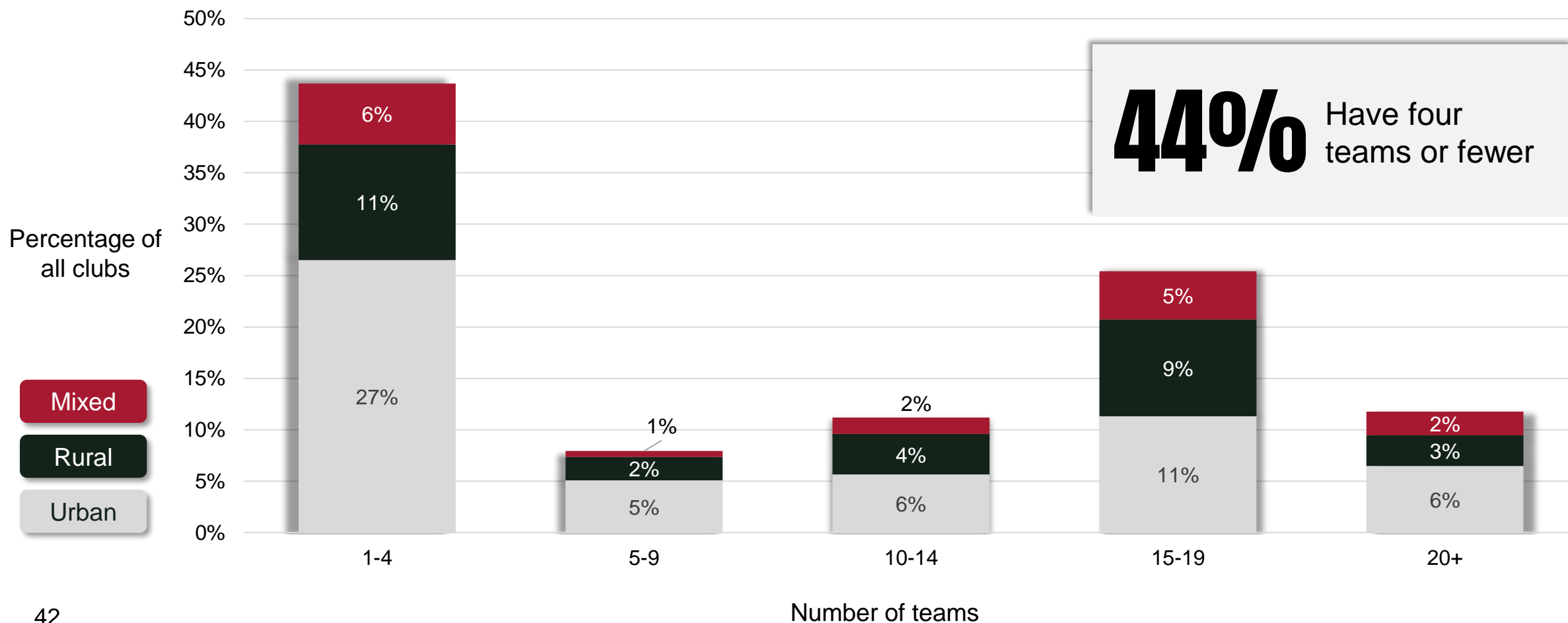
CURRENT INSIGHTS CLUB OF THE FUTURE

DAVID ROBERTS: CHAIR OF COMMUNITY GAME BOARD

RORY BELL: RFU STRATEGY & INSIGHTS, CLUB PLAYER & VOLUNTEER

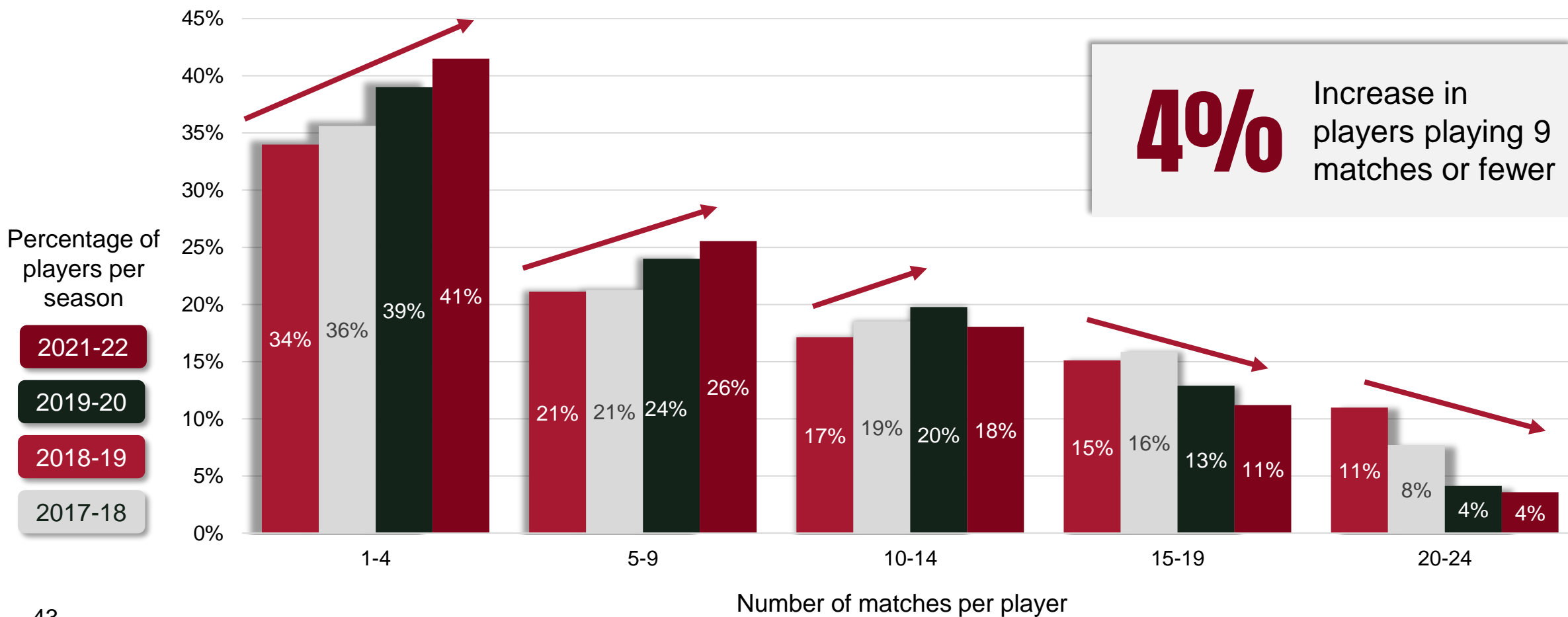
NUMBER OF TEAMS PER CLUB BY AREA CLASSIFICATION

Our clubs split between very small & very big, with few inbetween:



NUMBER OF MATCHES PER PLAYER - SEASON TO DATE

The trend is for players to participate in fewer matches each season:



CURRENT STATE INSIGHTS: CLUB LANDSCAPE

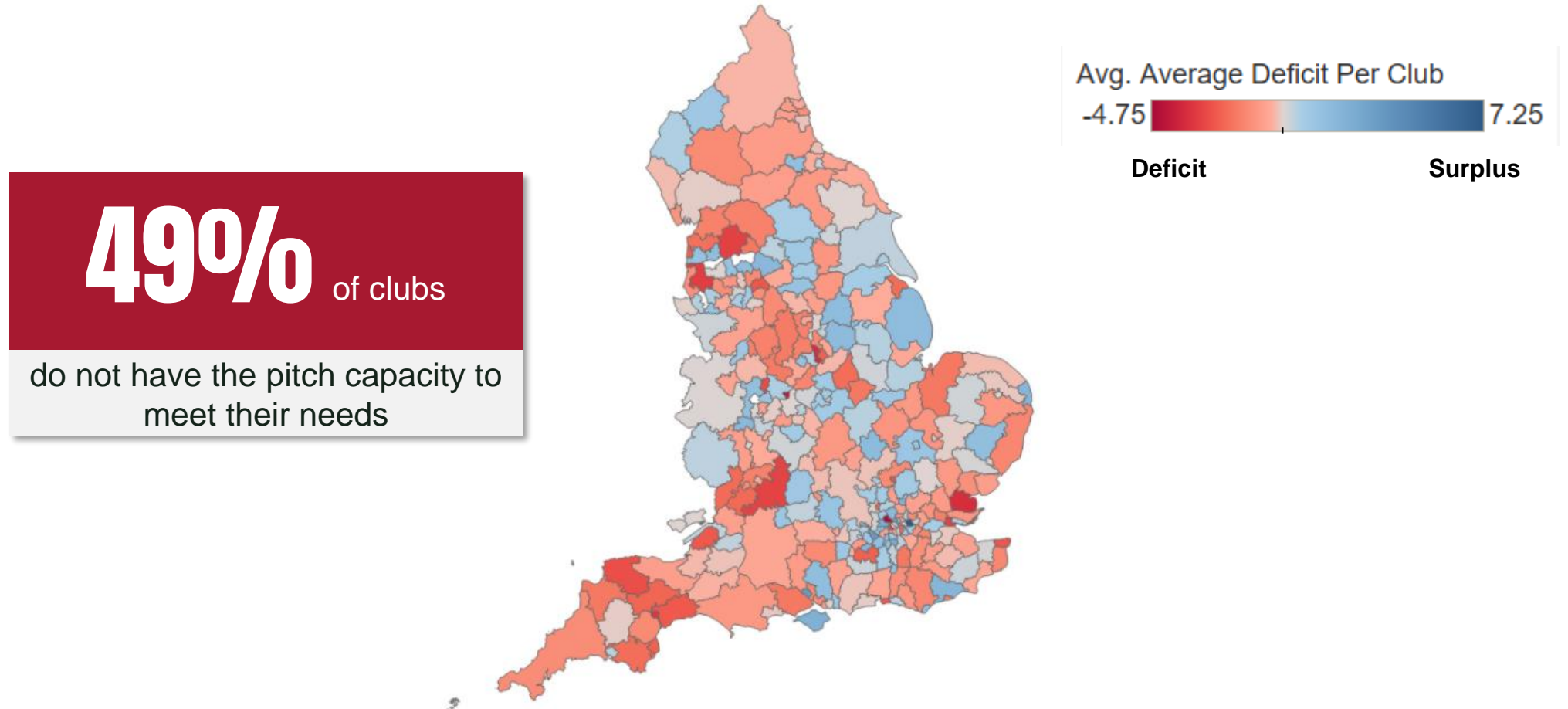


On average, clubs do not have the pitch capacity for all their training & matchday needs

Lack of provision for facilities catering to Women and girls game i.e. changing rooms

PITCH DEFICIT ACROSS LOCAL AUTHORITIES IN ENGLAND

Across England, clubs will need the engagement of the local community in order to address the strain on pitch supply:



CURRENT STATE INSIGHTS: CLUB LANDSCAPE



On average, clubs do not have the pitch capacity for all their training & matchday needs

Lack of provision for facilities catering to Women and girls game i.e. changing rooms



The administrative burden continues to be the primary concern of off-field volunteers

Committed band of volunteers cover an ever-increasing commercial & legal requirements

CURRENT STATE INSIGHTS: CLUB LANDSCAPE



**ON AVERAGE, CLUBS DO NOT
HAVE THE PITCH CAPACITY
FOR ALL THEIR TRAINING &
MATCHDAY NEEDS**

**LACK OF PROVISION FOR
FACILITIES CATERING TO
WOMEN AND GIRLS GAME
I.E. CHANGING ROOMS**



**THE ADMINISTRATIVE
BURDEN CONTINUES TO BE
THE PRIMARY CONCERN OF
OFF-FIELD VOLUNTEERS**

**COMMITTED BAND OF
VOLUNTEERS COVER AN
EVER-INCREASING
COMMERCIAL & LEGAL
REQUIREMENTS**



**VOLUNTEERS' ROLES HAVE
MORE & MORE DIGITAL
ELEMENTS**

**INFLUENCE OF TECHNOLOGY,
SOCIAL MEDIA &
INCREASING LEISURE TIME
CHOICES ON PARTICIPANTS**



CLUB OF THE FUTURE PANEL

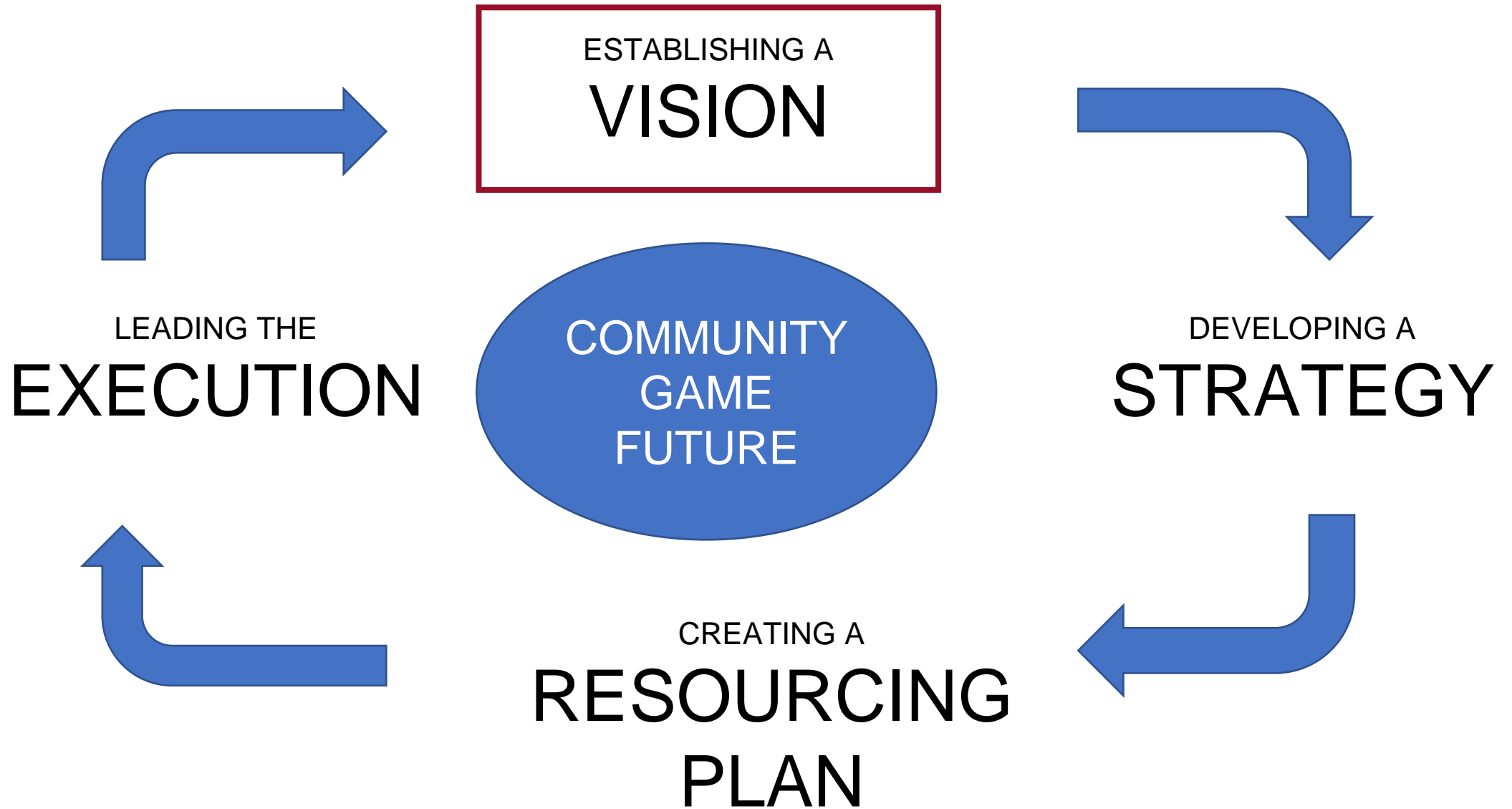
KIRSTY GOLDIE-BRAMMER: RFU CLUB & COMMUNITIES

BEN ROCKLIFFE: NATIONAL YOUTH COUNCIL

EDDIE KEAL: RFU COUNCIL MEMBER AND CB CHAIR

JACKIE DYER: RFU COUNCIL MEMBER AND CLUB CHAIR

MARK BROCKLEHURST: CLUB CHAIR



CLUB OF THE FUTURE PANEL

1. Clubs will be more collaborative off the pitch and retain their identity on it (Club clusters)
2. *More* clubs will consume and offer shared common services
3. Clubs will provide access for all to a range of rugby formats and related offerings throughout the week
4. Rugby will be part of a multi-activity offering across a 7-day operating week at most locations
5. Clubs will be more demand driven, delivering *more of their activities* across parks, educational institutions and other sports clubs (non-exhaustive)

Individual Club Principles

Clubs require a balanced approach to the following areas of club operations: Community, Leadership and Management, People Experience, Finance and Commercial, Marketing and Communications and Facilities*

** It is noted facilities is the only pillar that may not be applicable to every club*



Club Principle 1

EDDIE KEAL: RFU COUNCIL MEMBER AND CB CHAIR

Challenges of today	Club Principles	Descriptions / Examples of potential solutions	Supporting Facts
<ul style="list-style-type: none"> • Not always enough players to field teams • Not all clubs have access to specialist coaches • Fragility of the single club • Non contact formats developing outside of clubs 	<p>Clubs will be more collaborative off the pitch and retain their identity on it (Club clusters)</p>	<p><u>Objective: Delivery of quality rugby experiences</u></p> <p>Club Clusters (Individually): Clubs will work together in clusters setup to achieve a desired set of objectives in a desired timeframe.</p> <p>Hub Club to act as a Coordinator with a role beyond solely delivering rugby to their own club, working on behalf of other clubs</p> <p>National Landscape - Multiple clusters across different areas - individual characteristics bespoke to the geographic area and the individual objectives the cluster is designed to achieve.</p>	<p>A number of the 28 AGP pitches have exceeded booking volumes for both rugby and non rugby activities. In addition demonstrating the success of Local Rugby Partnerships between clubs</p>

Club Principle 2

JACKIE DYER: RFU COUNCIL MEMBER AND CLUB CHAIR

Challenges of today	Club Principles	Descriptions / Examples of potential solutions		Supporting Facts
<ul style="list-style-type: none"> • Increasing regulation • Clubs duplicating effort • Overheads are increasing • Workload on volunteers is increasing 	<p>More clubs will consume and offer shared common services</p>	<p><u>Objective: Delivering administrative services to enable volunteers to focus their time on delivering quality rugby experiences</u></p>		<p>Committed band of volunteers cover ever-increasing commercial & legal requirements</p>
		<p>Types of services (examples):</p> <p>Transactional:</p> <ul style="list-style-type: none"> • Procurement and Contract Management • Employment / Recruitment • Social Media and Marketing • Legal • Pitch Maintenance 	<p>Business partner / strategic level:</p> <ul style="list-style-type: none"> • Business Planning • Risk Management • Estates Management 	
		<p>Relationship management</p>		

Club Principle 3 & 4

MARK BROCKLEHURST: CLUB CHAIR

Challenges of today	Club Principles	Descriptions / Examples of potential solutions	Supporting Facts
<ul style="list-style-type: none"> • Reduction in number of completed matches • Anticipated reduction in structured 15 a side season • Players demanding variety of sports • Under utilisation of facilities 	<p>Clubs will provide access for all to a range of rugby formats and related offerings throughout the week</p> <p>Rugby will be part of a multi-activity offering across a 7 day operating week at most locations</p>	<p>Clubs to expand their offerings to grow rugby formats, specifically non contact game on site, within clubs.</p> <p>With potential shortening of the contact 15 a side season structure, there is a need for clubs to expand their rugby offering (contact and non contact), and engage in more partnerships with the local community to more fully utilise facilities to generate income.</p> <p>Activity offerings - Bring local (non-rugby) community into the club to generate income and expand audience to potential new members</p>	<p>Partner with other sport</p> <p>Partner with activity utilising facility</p> <p>Partner with community enterprise</p>

Club Principle 5

Challenges of today	Club Principles	Descriptions / Examples of potential solutions	Supporting Facts
<ul style="list-style-type: none"> • Increased competition for peoples recreational time • Need to attract a more diverse demographic of players and volunteers in the game • Non contact rugby growing outside of the club network 	<p>Clubs will be more demand driven, delivering more of their activities across parks, educational institutions and other sports clubs (non exhaustive).</p>	<p>Club outreach work to take the different formats of the game (contact and non contact) to where people are will be critical to maintain and grow club numbers in the Game</p> <p>Partnering with businesses in the local Community to finance and / or resource delivering those rugby services outside of clubs</p>	<p>Lower provision of rugby in city centres and areas of high deprivation</p> <p>No. of people aged 5-49 will increase in the fastest growing local authority by 14.7% and reduce by -11.9% in other local authorities between now and 2035</p> <p>49%* of clubs do not have the pitch capacity to meet their needs</p>

*Deficit/Surplus scores are based on the number of teams & demands of different team type categories (ie Adult vs Minis) & the number & type of facilities (ie pitch surface, floodlights) at each club, averaged out across the local authority

CLUB OF THE FUTURE PANEL

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NEXT STEPS

This month: (Sep 2022)

- Consolidation of all inputs

Next 3 months: (Oct-Dec)

- Socialisation with wider game
- External Consultation

Next 6 months (by Mar 2023)

- Initial approach drafted



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TEAMWORK. RESPECT. ENJOYMENT. DISCIPLINE. SPORTSMANSHIP.