



# The Future of Rugby: An HSBC Report

#futureofrugby

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# HSBC World Rugby Sevens Series 2015/16



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**1985**  
International Rugby Board votes to set up Rugby World Cup

**1987**  
First Rugby World Cup is hosted jointly by Australia and New Zealand

**1993**  
First Rugby World Cup Sevens

**1998**  
Rugby is added to Commonwealth Games and Asian Games

**1999**  
World Sevens Series launched

**2004**  
Rugby sevens added to World University Championships

**2009**  
The IOC votes to add rugby to the Olympics

**2011**  
Pan American Games includes rugby sevens

**2016**  
Rugby returns to the Olympics

# The 30-year road to Rio

**1991**  
First women's Rugby World Cup (fifteens)

**1997**  
First women's sevens tournament at Hong Kong

**2004**  
Women's sevens at World University Championships

**2009**  
First Women's Sevens World Cup

**2010**  
Women's sevens at Asian Games

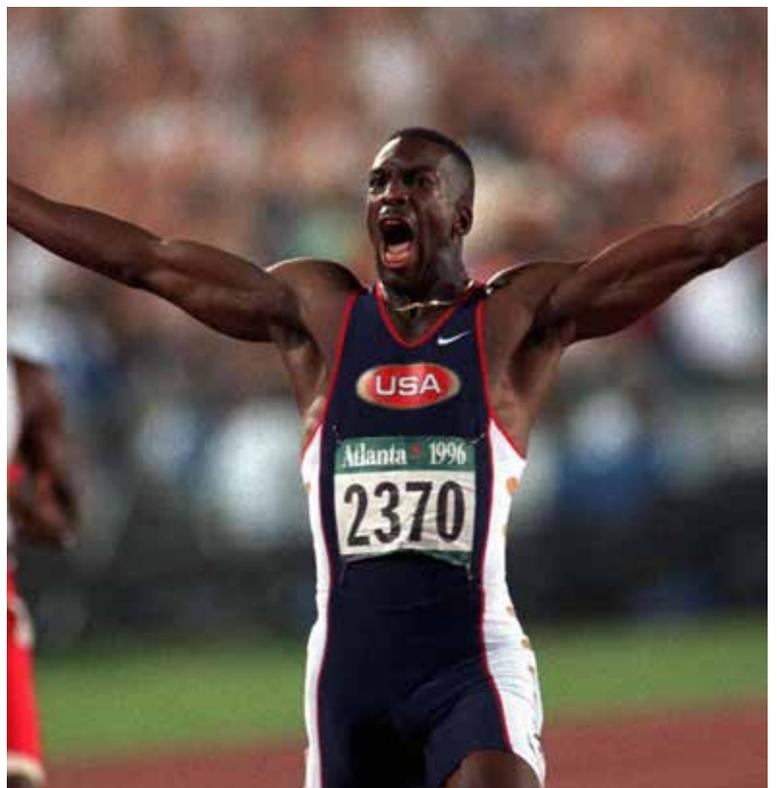
**2011**  
First Women's Sevens World Series

**2015**  
Women's sevens at the Pan American Games

**2016**  
Women's sevens at the Olympics

**“The IOC [International Olympic Committee] is looking for sports that will attract a new fan base, new participation, sports that younger people are interested in... I think there’s a recognition on the part of the IOC that just sticking with the sports that have always been a part of the Olympics will not grow that fan base and participation... When you look at the athleticism required to excel in rugby sevens, it certainly fits with the Olympic narrative: speed and power are extremely important in sevens.”**

Michael Johnson, four-time Olympic sprint gold medallist, USA



# Contents

Foreword by Giles Morgan Global Head of Sponsorship and Events, HSBC	3
The Olympic Opportunity	4
Looking ahead: Seven predictions for 2026	8
New countries	10
New players	14
New audiences	20

# Foreword

by **Giles Morgan**

HSBC Global Head of Sponsorship and Events

2016 is a pivotal year for rugby, and especially rugby sevens. The World Rugby Sevens Series, sponsored by HSBC, has expanded to ten tournaments, has embraced a growing Women's Sevens Series, is reaching new markets and new cities around the world, and, in August, the sport takes its place at the Olympics for the first time since 1924.

Olympic inclusion was not an overnight success. It was a result of considerable development work that has seen men's and women's sevens recognised by all the major multi-sports events.

To mark the occasion of rugby sevens joining the world's biggest sporting event, we have been working with leading strategic planning consultancy, The Futures Company, to take a glimpse into the future of rugby and the game's new opportunities for growth, in new and existing markets.

By researching data and conducting interviews with industry experts such as Sir Clive Woodward and sporting greats like US sprint star Michael Johnson, we have examined rugby's transformation into a global game and painted a picture of how the sport might look in 2026.

So where could rugby be in a decade's time? It seems entirely possible that:

- Countries with little rugby tradition will be internationally competitive, certainly at sevens
- The overall number of players—and the proportion of female players—will have doubled
- The higher profile of sevens will create new national competitions between clubs or franchises
- Sevens will emerge as a summer sport in its own right
- Audiences will have changed—and they'll connect with the sport in new ways. Younger people will find the game through social platforms rather than traditional media. Meanwhile, innovations that capture the speed and power of the game will transform TV coverage.

Our findings suggest that rugby sevens' inclusion in Rio 2016 has already been game-changing for the sport. The impact of Rio, and the 2020 Games in Tokyo, will be greater even than that of the highly successful 2015 Rugby World Cup in England.

'The Future of Rugby' builds on the success of 'Golf's 2020 Vision', an HSBC report that looked at where golf—another new Olympic sport—might get to in 2020.

As a global banking and financial services organisation, we aim to be where the growth is, connecting customers to opportunities. We have commissioned this report because we want to help rugby capitalise on the Olympic opportunity—and, as sevens grows in popularity and global 'reach', help simulate debate about its future.

Having all the right ingredients doesn't necessarily guarantee success, so it's crucial that World Rugby, local unions, players, National Olympic Committees and sponsors are committed to making the opportunity count. The gold medal for the sport will be to use Rio 2016 to drive participation and engagement and ensure it continues on its current growth trajectory.

It's been fascinating to research. We hope you enjoy the read.





# The Olympic opportunity

**The hard yards have been done, the platform for expansion put in place. The signs are there to see, in the rapid increase in player numbers, in the sport's growth in Asia, Africa and America, and in the success of new national teams in the HSBC World Rugby Sevens Series. Rio 2016 is rugby's big chance, its opportunity to secure its future as a global game**

The inclusion of rugby at the Olympics, after a gap of 92 years, is testament to how far the sport has come in the past three decades. To qualify for the Games, sports need to be played competitively in at least 75 countries on four continents and to be included in a number of regional multi-sports tournaments.

Rio 2016 is but the latest milestone in a development process that has taken the sport beyond its traditional heartlands to new countries and new markets. Key to this transformation has been the short-form game, rugby sevens. It is sevens that will be played at the Olympics; it is sevens that will help raise the profile of the game on the world stage this year.

If the money in the sport is still predominantly associated with the ten unions that compete at fifteens in the Six Nations in Europe and The Rugby Championship in the southern hemisphere, and global investment driven by the four-yearly Rugby World Cup, the breadth of participation, by region and by gender, is now associated with sevens.

World Rugby, formerly the International Rugby Board, has pursued a long-term development strategy, investing money from its core game (fifteens) into the more accessible sevens game. Rugby's Olympic opportunity owes much to the commercial success of the Rugby World Cup, which since its launch in 1987 has made this investment possible, and to the creation of the Rugby World Cup Sevens in 1993 and the World Rugby Sevens Series in 1999, which have built a platform for the development of the international sevens game.



The result: sevens is now played in more than 100 countries worldwide, and boasts a competitive women's game, which is also the fastest growing sport in the United States. Sevens is now included in all of the significant regional and global multi-sports competitions.

Thanks in no small part to the popularity of sevens, rugby union now has the right foundations for the future: new countries, new players, new audiences.

The arrival of the game at the biggest sporting event in the world this summer will be the catalyst for further growth.

The financial return of Olympic inclusion is immediate. While numbers are hard to find, journalist Tim Maitland reports that when badminton was threatened with delisting from the Games in the early 2000s, it calculated that Olympic status released more than \$100m to the sport globally, in funding from governments and National Olympic Committees (NOCs). Its share of TV rights, then \$6m, was icing on the cake.

Since the 2009 vote to add rugby to the Olympic roster, the sport has accrued an estimated £20m of funding from NOCs. This is money that is poured straight back into the game, to support its future health and development. Even the best-managed federations can find it hard to channel funding into building a sport in new locations, or developing depth and expertise in emerging federations. The Olympics helps close the funding gap.

While the initial benefits are likely to be seen in the development and participation of the sport rather than in spectator numbers—Olympic audiences are huge, but interest in fringe sports tends to be confined to the countries that play them already—there is no doubt that the Olympics will transform the image of rugby.

Countries will start to take the sport more seriously—and funding and government support will increase. We're already seeing evidence of this. After the Olympic decision was taken, China put together a full-time professional women's sevens team, which has performed creditably since.



**“Sevens is this sleeping giant of rugby. I think it can really help the game develop on a world level... Rio will be the springboard to take it global”**

**Sir Clive Woodward, 2003 Rugby World Cup winning coach**

## Rugby and the Olympics: now or never?

This year, rugby is being played at the Olympics for the first time since 1924. It's an achievement that owes a lot to investment in the sport and the global development of sevens—and a little bit to luck.

The number of sports in the summer Games has historically been capped at 28, and most of those in the programme have been there for a century or more. Rugby's opportunity came because baseball and softball were removed from the programme after 2004.

Candidates for inclusion have to meet a number of criteria—for example, participation in other multi-sports competitions—and to convince the IOC that they'll do as much for the Olympics as the Olympics will do for them.

Once it's qualified and met IOC criteria, a 'new' sport effectively gets only a single Games to prove itself. Although rugby is included in the programme for both 2016 and 2020, the decision on which sports are to feature in the 2024 Games will be taken by the IOC before the 2020 Games, albeit under new more flexible rules adopted in late 2014.

Rio 2016, then, could make or break the sport at the Olympics.



The USA beat France in the final of the 15-a-side rugby union tournament at the 1924 Olympics in Paris.

The Olympics reinforces the position of sevens in regional multi-sports tournaments. When a men's sevens tournament was added to the Pan Am Games in Mexico, World Rugby and Mexico's Olympic Committee combined to help the host create a competitive team. Increased sponsorship funding flowed from the increased visibility, and the sport was included in Mexico's National Youth Games.

The scale of the opportunity, then, is dramatic. But there are challenges ahead; with growth comes risks. Careful management will be needed to develop the two forms of the game in parallel. Tensions inevitably arise when a core form of the game (fifteens) generates the money that



then finances a rapid expansion of another form, such as sevens—especially when an increasing number of national unions focus more on this developing form.

After the Games, as the final section of this report makes clear, much will depend on continued use of digital media to connect with younger followers, on technologies that transform the experience of watching rugby for TV viewers, and on the creation of commercial partnerships and media relationships that best serve the long-term interests of both forms of the game.

The Olympics is a major milestone. But it is far from the end of the journey.



Collins Injera in action for Kenya

**“Rugby has undergone tremendous growth in Kenya over the past decade, driven by the popularity of the sevens game. Every child playing rugby in Kenya dreams of becoming an Injera, Ouma, Kayange and playing on the world stage. The reintroduction of rugby at the Olympics will increase the allure of the game in Kenya. The prospects for rugby are vivid”**

**Charles Nyende, sports journalist and former Kenyan rugby international**

# Looking ahead

## Seven predictions for 2026

**The future of rugby is about new countries, new players and new audiences. The Olympic opportunity is part of a growth trajectory that continues beyond 2016. These are our seven predictions for the next ten years**

### New countries

#### 1. More nations break through

Already, Tier 2 rugby nations such as Fiji and America have had success on the HSBC World Rugby Sevens Series Tour, and Tier 3 nations have won medals at regional games (China, Kazakhstan, Brazil and South Korea, for example). While the Tier system will still be in place to support the development of fifteens teams in 2026, it will be less useful as a guide to sevens performance. Countries such as China or Brazil, which use the Olympic opportunity to drive funding into the game, will be competitive in both men's and women's sevens. Expect to see the Sevens Series follow the game to these new growth hotspots, with venues in cities such as Shanghai and Rio.

#### 2. Sevens creates its own "Big Bash"

The higher profile of sevens as a series of competitions between national teams, at multi-sports games such as the Olympics, and at the World Rugby Sevens Series, will create new national competitions between clubs or franchises. In Australia, the ARU has already been looking at what it can learn from the success of cricket's Twenty20 Big Bash; in the US, this might involve sports franchises; in the UK, the teams might be associated with the English Premiership and the Pro12 clubs. In turn, this will increase knowledge of the sport among people who might not have the opportunity to go to a World Rugby Sevens Series event, and create new national media exposure, coupled with broadcast and scheduling innovation (in the same way that coverage of Twenty20 cricket has been transformed). This will also develop a pool of players and coaches, increasing the depth and the reach of the sport.



#### The new dual-code stars

As the money grows in the sevens game, rugby league stars who cross over will opt for sevens rather than fifteens. The skills required are a much better match.

"Sevens is much less technical, less crowded and more reliant on the speed and handling skills that rugby league promotes... rugby league players are taught not just to tackle the man, but also to wrap up the ball. That's something that's important in rugby sevens when winning possession of the ball is critical"

**Jason Robinson, former league and union international**



Australia celebrates victory at the second round of the HSBC World Rugby Women's Sevens in São Paulo, February 2015

## New players

### 3. Participation doubles

There are currently more than seven million rugby players worldwide, and this looks set to reach ten million by 2020, with a combination of Olympic exposure and continued investment from World Rugby and some new funding from National Olympic Committees around the world. A significant share of development money is going into larger markets such as the US, Brazil and Germany. China seems likely to be close behind. Within a decade, rugby should be able to count 15 million players around the world, with most coming into the game through sevens.

### 4. Women lead the charge

Women's rugby is the fastest growing sport in the world at the moment, and it has been adding close to 500,000 players a year for the past few years. It is growing quickly in both developed and emerging markets. Even if those growth rates drop a little, by 2026 40% of rugby players worldwide will be female, representing some six million players worldwide.

## New audiences

### 5. Broadcast pyrotechnics transform coverage

Rugby sevens has most of the ingredients to be the template for a 21st century sport. One of the final elements, however, will be the development of broadcast coverage that better captures the excitement of the spectator experience. By 2026, sevens' TV viewing experience will have been transformed by innovations demonstrating the speed, skill and sheer athleticism of the players. Be prepared to see on-player cameras and a combination of golf's Protracer and tennis's Hawk-Eye showing off player pace and agility that will help connect the sport to new audiences.

### 6. Media value moves to social platforms

By 2026, sports media will be live or be on digital social platforms, or both. Websites will be largely redundant, except as reference sources. Sports content will mostly be hosted on and consumed through social platforms, whose owners will represent important opportunities for partnerships, revenues and brand development. For younger audiences, live content will also increasingly be watched via devices rather than on television. Expect to see the development of a sevens-based e-gaming community, which will also be a space through which sevens stars emerge. A sevens-based video game will also be published—to better reviews than recent fifteens-based video games.



### 7. Summer sevens becomes self-funding

As sevens grows in visibility and reputation, it will start to drive revenues in its own right, from attendances and media and sponsorship sales. This will be enhanced by the development of national sevens series leagues, and by the emergence of sevens as a summer sport in its own right. This will involve a greater focus on the athleticism and power of the game, and on the competitive nature of the matches and the teams. One effect will be that we'll start to see sevens players emerge as stars in their own right. Another will be to change the nature of the audiences; there will be a broader base of followers, there for the excitement of the event. The 'carnival' of sevens will continue—but with more emphasis on the action on the pitch.

# New countries

**Rugby's inclusion in the Olympics and its global expansion over the past 20 years mean it will soon rival football as an international game. By 2026, it could be being played in 150 countries around the world**

Rugby's global reach has extended rapidly since the start of the Millennium. The number of member unions worldwide has grown by a third, from 90 to 120, with 7.6 million players globally. Boosted by a record £350m of funding since 2009 through the World Rugby Development Programme, the Regional Tournament Fund and the High Performance Programme, global participation in rugby has doubled in less than a decade.

The sevens version of the game has been crucial in extending the reach of rugby and embedding the sport in new markets and regions. Aside from the significant opportunity presented by the 2016 Olympics, sevens has achieved sufficient status for inclusion in the Commonwealth Games, the Pan American, and the Asian Games, for both men and women. Gareth Rees, Commercial Director at Rugby Canada, argues that rugby's inclusion in the Pan Am Games has legitimised the sport for North Americans, and coupled with its new Olympic status, has given the sport greater credibility and appeal for aspiring athletes and their families. Tournaments such as the Pan Am Games bring with them age-based development programmes, now a key part of Rugby Canada's growth strategy.

Sevens is assisting the spread of rugby to new markets. In Pakistan, to take one example, participation figures more than doubled in 2011 alone. In Africa, growth has been driven by a surge of young participants; according to research over 80% of the continent's players are under 20 years old.

The distilled form of the game also creates opportunities for existing, but less established, rugby-playing countries. In the United States, where rugby is thought of as an

"The pressure on any sport, as with any business, in terms of expansion and reaching new markets, is obvious. The interesting thing about rugby is that, historically, it has resisted this. A very small group of countries have held an incredible amount of power, and those countries aren't necessarily places dominating any other sports.

However, looking at recent results and new initiatives, such as Play Rugby USA, the game is finally developing across a variety of countries—rugby is being taken beyond its traditional core."

**John Harris, author of *Rugby Union and Globalisation***



National sevens' team captains line up in Dubai

amateur sport, sevens has made a real mark. Sevens is the fastest-growing sport in the country. Its kids' 'Rookie Rugby' programme has drawn in two million young players to date.

The financial benefits of sevens are persuasive. Las Vegas made an estimated \$17m (in non-gaming revenue) when it hosted the US leg of the World Rugby Sevens Series in 2010. In Canada, the example of the sold-out sevens competition at the Manchester Commonwealth Games was used to support the case for sevens' inclusion in the Pan Am Games in Toronto in 2015. "It didn't take them long to see the potential of a two-day event," says Rees.

In 2016, the Vancouver leg of the HSBC World Rugby Sevens Series drew the largest rugby crowd in Canada's history. Vancouver was one of five new locations for the current Sevens Series, along with Sydney, Cape Town, Singapore and Paris. Sydney and Cape Town also had sell-out crowds, and the Series has proved to be one of the most competitive and open yet.

Singapore also represents a strategically significant addition to the World Rugby Sevens Series. Its increasing level of involvement in the global rugby scene is aligned with the recent, democratic, rebranding of the IRB to become the more visible, and globally relevant, World Rugby. The inclusion of Singapore in the Series is recognition of the rapidly developing Asian rugby scene, which has evolved a popular and competitive ARFU league. "Asia is an amazing place for sevens," says Marcus Blackburn, ex-Singapore National Sevens Team coach. "They now have this clearly tiered structure that I wish had been there when I was national coach."

A central reason for the expansion of sevens is its simplicity. It needs a smaller squad—just 12 players, including substitutes—and a single coach, compared to the three or four coaches needed to drill a fifteens team. It can be played in a park or on a borrowed pitch, without the surface being gouged by scrums or mauls. And because the core skills are about running and handling—and the essential tactical instruction is not to give the ball away—players transferring from other sports can pick up the basics easily. All this has allowed countries to build competitive sevens squads quickly.

The HSBC World Rugby Sevens Series has been an important building block in this process. It acts as a showcase for competitive international sevens, which has helped extend the game into regional multi-sports tournaments, and it also helps the development of emerging teams. The Brazil women's team, the strongest in Latin America, has been able to compete against the world's best through the Series. Platforms like this take time to build. As the former track star Michael Johnson observes, "You're not going to start out as a non-Olympic sport and have an immediate impact. A corporate such as HSBC that believes in the potential of the sport to grow, and to become a viable and sustainable vehicle, is extremely important."

The next stage is likely to be the development of national sevens tournaments to build the health of the game in its developing markets, to develop pools of talent—both of players and coaches—and increase competition and quality. Bill Pulver, CEO of the Australian Rugby Union, stresses the strategic importance of the sevens game to the sport of rugby as a whole. "It grows a number of key elements," he says. "From a player perspective, it's the perfect game for young boys and girls to get their first taste of rugby."

# Q&A: Sir Clive Woodward

**A former British Lions player, Clive Woodward coached the England team between 1997 and 2004, leading them to victory in the 2003 Rugby World Cup.**

**He played Sevens for Loughborough University and the Barbarians, and was the Director of Sport at Team GB between 2006 and 2012**

***Rugby is now being recognised by the wider sporting community. How has this happened?***

Through sevens, rugby is becoming a multinational sport. But it's still not a world game like football, so it's now about how you take it to that next level. World Rugby realises this, and hence the big emphasis on rugby sevens. I think sevens is this sleeping giant of rugby. I really think it can help develop the game on a world level. No doubt about it. Rio will be the springboard to take it global.

***What type of funding does the Olympic badge open up?***

The key thing about a lot of government funding for sport in a lot of countries is that it is based on Olympic sports, so if your sport is lucky enough to be accepted as an Olympic sport the government looks upon it very differently. It makes a massive difference because if you think in terms of developing your game, you do need money. Rugby will look back in a few years' time and know that the Olympic seal of approval was a big step forward in terms of the development of the game worldwide. You'd love to see the game really taking off in India and China, which have big populations.

***Does the relative simplicity of sevens make a difference to development?***

You can literally start a sevens club in a park. It's very easy to play and coach, so you just start to play against each other. You've just got to get a group of people who play very simply. And sevens is just faster, with seven minutes each way, which I think is the ideal time. To run non-stop for seven minutes is a big ask, so it's a fitness and aerobic sport, far more so than fifteens. You want absolute gas and pace.

***What do you think the fifteens game can learn tactically from sevens?***

Sevens is still a game where you keep the ball no matter what part of the field you're in. In fifteens, New Zealand won the World Cup because they were a team full of what I call sevens players from 1 to 15. They can all pass, they can all run, and the game was played very fast. Eddie Jones recently called this 'ruck and run rugby', where everybody is running. The smaller teams can beat the bigger teams. Fifteens can learn a lot from sevens.

***If sevens becomes too popular, can it harm the fifteens game the way Twenty20 has affected cricket?***

They can be developed alongside each other. Sevens does attract a different crowd from fifteens in many respects. It's more of a carnival, a festival. I've never seen sevens as a development game for fifteens, because it's different in its evolution. It may overtake fifteens in many ways, if you think about the number of people playing, the popularity. I see that as a good thing, it's a simpler game, it's easier to play, it's less physical, and it would attract a lot more players.

***Are we going to see some sevens stars emerge from the Games?***

The currency of an Olympic gold medal is just colossal, and I'm expecting both the men's and the women's rugby to be quite special and get big viewing figures, not only at the Games but also on TV. When you're there at the Games you see what it means to the competitors.

***You used to play sevens yourself. What was your best moment?***

At Loughborough University, where I was captain of the sevens, there were big tournaments. But the biggest tournament was the Hong Kong Sevens. I was lucky enough to play for the Barbarians in 1981, and we were the first British team to win it. We didn't do it the easy way, we played Australia in the final, we played Fiji in the semi-final. Again, did it help my 15-a-side rugby career? Definitely. Did it help me as a coach? Definitely.

**“Rugby will look back in a few years and know the Olympic seal of approval was a big step forward in terms of development of the game worldwide”**



# New players

**Rugby is attracting players beyond its traditional heartlands and demographics. Global participation is expected to reach 15 million by 2026. The huge surge in the number of sevens players raises questions about fifteens—but both forms of the game can develop in parallel**



**“The women’s game was key to the sport’s Olympic inclusion. Personally, I think women’s sevens is a fantastic advertisement for our game. I believe it’s our biggest opportunity”**

**Mark Egan, Head of Competitions and Performance, World Rugby**

The growth in number of global member rugby unions is one aspect of the sport’s success story; the actual growth in number of players worldwide is another measure of achievement. The record levels of engagement driven by Rugby World Cup 2015, coupled with the anticipation of rugby played on an Olympic stage, point to even greater uptake figures to come. The rising status of the sport increasingly attracts players and audiences at a younger age, as well as athletes from other sports who can profit from rugby’s improving talent pathway and increasingly robust development programmes.

Uptake figures are especially staggering in the case of women’s rugby, now acknowledged as the fastest growing sport in the world, with participation rates exploding from 200,000 to 1.7 million in the last three years alone. The proliferation of female players globally evidences a changing cultural attitude towards women playing contact sports. A 2001 study in the *Journal of Sport Behavior* found that “sports are perceived as gender-neutral, masculine and feminine, and are perceived as different on the basis of features such as aesthetics and danger”, but since the turn of the Millennium we have seen a deep attitudinal shift, demonstrated partly by media coverage of the 2012 Olympics women’s boxing tournament. Hailed as the “purest distillation of Olympic spirit—the pursuit of sport for sport’s sake” by *The Daily Telegraph*, the once-banned women’s boxing overcame lack of funding and political and cultural barriers to achieve Olympic status and public profile.

The surge in popularity of women’s rugby can only serve to break down the financial and infrastructural barriers that, until now, have been felt by even the most established and affluent rugby-playing markets.



On your marks: sevens players begin their 'Race to Rio' in Dubai at the start of the 2015/2016 HSBC World Rugby Sevens Series

As for developing markets with less of a commercial base, Chris Cracknell, the English-born coach of 'Fijiana', the Fiji national women's sevens team, outlines the constraints faced by players and coaches there. "Budgets have been the main issue," he tells us. "We only have a set of cones and rugby balls from Series events to train with, most of which now have no grip or are mis-shapen, and only have one set of home and away jerseys, which double up as our gym and training tops. The girls just get on with it, testament to how much it means to them to play for their country."

With no formal league scouting system, Cracknell scouts talent on his walks around Fijian villages, where touch rugby is played as the sun goes down. Coaching sevens in the southern hemisphere, Marcus Blackburn has seen what the Fijians are capable of first hand: "Fiji are the team to beat in the Olympics, and to think they do that with relatively poor infrastructure—it goes to show what really is important in the game of sevens. Is it about talented athletes who suit the game as they do in Fiji or is it about infrastructure?"



Litia Naiqato of the Fiji women's sevens team

## Playing for Fijiana

Rio 2016 offers Fijiana the potential to claim Fiji's first ever Olympic medal.

Litia Naiqato has been part of the Fijian women's sevens team for four years. When she is not travelling for tournaments she lives with her family in the village where she grew up in the 1990s.

Before her rugby debut in 2012, Litia was a soccer player. Since making the transition to rugby, she has become a lot fitter and stronger. But her village, Dakuinuku, is in a very remote part of the archipelago of Fiji. She has access to electricity and running water, but there are no training facilities, such as a gym or a rugby pitch.

As a result, her training days are long. It takes a two-and-a-half hour journey to get from her village to the Fijiana training hub in Suva. Just getting to the bus-stop requires a five-kilometre run. She leaves her house before dawn and gets back late in the evening.

Like all players, Litia's goal is to give her best. The Olympics were in her mind even before the team qualified.

**"I have dreams that are coming true and the opportunities to sharpen my skills up. I feel really positive and excited now."**

Litia also has dreams for after her career with the Fijiana team. Having the opportunity to play in sevens tournaments across the world with Fijiana has made her realise what her village really lacks. She would love to build a gym there.

**"I am really proud of myself and thank the Lord for answering my prayers for running all the five kilometres to get to training."**

## Sevens versus fifteens?

The short-form of the game is not a recent invention: it originated at the end of the 19th century and has been played ever since (see box, next page). Its new-found popularity, however, raises questions about the future of rugby. Does the development of a more dynamic and more accessible game threaten fifteens? Will sevens do for rugby what Twenty20 is alleged to have done for cricket: undermine the traditional game?

Our research suggests that the two forms of the game will not only be mutually compatible but also mutually reinforcing.

For established rugby markets, the coming seasons will determine whether sevens can alter its relationship with fifteens, which views it largely as an accessory game and a useful fundraiser, but not yet an equal format. Although clubs such as Melrose have benefitted financially from sevens, the modern international sevens tournaments are supported by revenue generated by fifteens.

Another rugby economy exists, however—one based on talent. Coaches, players and, importantly, knowledge are transferring between rugby codes to strengthen the global rugby ecosystem. Cross-overs are not always entirely successful—league star Sam Burgess recently called time on his switch to union—but the sport is now more fluid than ever before. If the traditional dichotomy between rugby codes no longer applies, why should there be a dichotomy between sevens and fifteens?

Skill is also being drawn into the system from other sports, the USA sevens team being a prime example of this. Track and field stars Carlin Isles—called the ‘fastest man in rugby’—and Perry Baker joined the team, and have since revolutionised American plays with their unmatched speed, garnering significant social media attention and commercial success, as they are moulded into formidable sprinter/sevens-player hybrids. “[USA sevens coach] Mike Friday taught me how to read pitches, how to be in the right place at the right time,” Isles reflects. “We play chess with our defenders, [Perry] and me.”

That sevens mentality is beginning to permeate the fifteens game at grassroots level, as more established rugby markets increasingly use sevens to build young players’ skills. “Playing the two formats exposes different facets of your game in turn,” says ex-England sevens captain Ollie Phillips. “If you can master both, you will end up a very good rugby player.”

Success at sevens has more to do with the lung-busting business of anaerobic thresholds, while fifteens places more emphasis on strength, and not just among the forwards. Whatever the on-field tactical differences, though, the skills demanded by sevens, both technically—handling and passing—and in terms of decision making, improve a player’s fifteens game. Lawrence Dallaglio won a Sevens World Cup before he played for England at fifteens. Both Sir Clive Woodward and sevens coach Marcus Blackburn make this point about the transfer of skills. As Woodward observes, “If you’ve got the skills and handling ability, you don’t worry what part of the pitch you’re playing the game on. The real top teams are comfortable playing the ball anywhere and attacking from their own half or 22.” These skills are further developed by exposure to the sevens game.

According to Phillips, the two formats inform one another more than ever. He identifies a critical issue for the development of the game, however: a lack of coaches. “That’s probably the biggest void in the game generally—not a lack of playing talent but coaching talent.”

Indeed, this has been a significant challenge for other sports that have experienced a surge in interest. The critical issue, as British Cycling discovered after the UK’s cycling successes in 2012, is not elite level coaches, but those who can nurture newcomers to the sport, in particular young people. In the next section, sevens coach Marcus Blackburn talks about the challenges of coaching sevens.



Quade Cooper and Sonny-Bill Williams are two of the global superstars who have turned their hands to rugby sevens and now have Olympic medals in their sights

## The invention of sevens

**1883: Melrose, Scotland.** Ned Haig, a butcher and a player at Melrose RFC in the Scottish borders, organises a fundraising rugby tournament for his struggling club. Knowing that players could not conceivably play several 15-man matches in one day, he cuts teams to seven, and games to seven-minute halves—thus the ‘sevens’ form of the game is born.

As Haig recalled in an article, ‘An Old Melrose Player’s Recollections’, it was a case of necessity being the mother of invention.

“Want of money made us rack our brains as to what was to be done to keep the club from going to the wall, and the idea struck me that a football tournament might prove attractive, but as it was hopeless to think of having several games in one afternoon with 15 players on each side, the teams were reduced to seven men.”

Sixteen hundred tickets were sold for Haig’s first tournament, and a lucrative tradition was soon established. Other clubs were quick to realise the value of the tournament, since it was difficult to maintain a club on gate money and subscriptions alone. They also realised the attraction of this form of dynamic rugby competition for players and spectators. The rugby clubs in the Scottish borders begin and end their seasons with sevens events to this day.

# Q&A: Marcus Blackburn

**Marcus Blackburn, the author of *Coaching Rugby Sevens* (2013), has coached teams around the world, including the national Singapore sevens team and Australian champions New South Wales, and at all levels—from junior-school league to elite**

I'm fascinated by the puzzle of sevens, the movement and the manipulation of numbers. It's exciting that interest in sevens is so widespread, yet very much in its infancy. It's living off the profile of rugby for now, until it can establish itself as other key sports have had time to do.

***It seems that, as sevens establishes itself globally, a specific breed of rugby player is evolving. How different are fifteens and sevens players?***

The Olympics have motivated some fifteens superstars to make themselves available to play sevens, and from that arises the debate as to whether they'll actually be suited to the game or not. I have some doubts as to whether they will be able to step up and meet the demands of the sevens game, especially as established rugby markets are manufacturing their sevens players much earlier now.

Every time a sevens side is on the attack, there is an opportunity to manipulate the defence to gain a numerical advantage, find space and score tries. That's part of the sevens education, which, like any education, takes time to instil. Sevens is a numbers game. In fifteens you might have a momentary overlap with two players running at one, thus numbers become important, but in sevens that numbers challenge never goes away.

***What are the necessary physical attributes?***

At the highest levels, sevens coaches are looking for athletes of a certain kind who can handle the 'repeat efforts' required in the game. In fifteens, you still need technically specialist players for the scrum, for example, whereas the priority in sevens is that every team member has a much broader skill set. The players, and the games themselves, differ a lot, but not so much so that there should be exclusivity across all levels. Sevens means accessibility, which is why emerging rugby nations are embracing the game and investing in it as they are.

**“Sevens is living off the profile of rugby for now, until it can establish itself as other key sports have had time to do”**

***What about similarities? What transferable skills or tactics can be taken from one game to the other, if any?***

The way I coach fifteens is more influenced by my sevens coaching than vice versa; there is a definite transfer of ideas. A key thing I've found is that sevens is not an abbreviated version of rugby—it's rugby with a big magnifying glass on it. With smaller numbers on the field, everything is more exposed, so if you make a mistake in sevens it's arguably worse than in fifteens, because of the space available. One missed tackle could result in a try, whereas in fifteens there are usually plenty of others to recover that mistake for you.

The exposed nature of the game makes it a great education for rugby in general, and also makes it so much clearer to referee. In a ruck or contact situation in fifteens, a referee's decision can often be contested, so much is going on, but in sevens you can spot misdemeanours so easily. The demand for technical accuracy from the players is so high, especially in contact, but also when it comes to other areas of the game, even passing: sevens players need to be able to

pass further, often more than ten metres, as opposed to just five to ten. If all fifteens players could do that, and develop the kind of technical accuracy demanded of sevens players, the game itself would start to change. If fifteens coaches were open enough to acknowledge and embrace the value that playing sevens brings to their team it would improve the entire game.

***What else needs to change in the rugby landscape for the sevens/fifteens relationship to thrive?***

We need investment in coaching. There are so few sevens coaching courses happening globally, even in the most established rugby markets! Specialist sevens coaching is still a niche, generally reserved for the highest levels. I wrote the book because I felt I had something to share, and still do. Sevens is a different game and demands a different language to fifteens. Developing a fluency in this language, across the world, should be the aim, and I am certainly on board to make it happen.



# New audiences

**The size and the composition of the audience for rugby will change. So, too, will the way people experience the sport and connect with it. A dynamic game, rugby demands dynamic media—and broadcast innovations that capture the pace of play**



**“When social media is used well and in the right way, beyond growing and engaging new audiences, it will also help unlock greater commercial value”**

**Alex Trickett,  
Head of Sport, Twitter UK**

The underlying media value of a sport is largely determined by the size and nature of its audience. Rugby’s media value has traditionally benefitted from its ability to attract affluent men aged 35 and over, who are hard to reach through TV advertising or sponsorship; sevens can potentially add a younger audience that is also hard to reach. Jonathan Hill, Global Commercial Director of the WPP sports rights agency ESP Properties, says, “Following its exposure at the Olympics the rights associated with sevens could increase in value by around 50%.”

Hill also expects strong growth in Asia towards the end of the decade, with a Rugby World Cup in Japan in 2019 followed by the Tokyo Olympics in 2020. Last year, with strong World Cup performances from teams such as Japan, Asia’s rugby TV viewership increased by 69%. Some 25 million Japanese viewers watched Japan’s Rugby World Cup game against Samoa after the team had beaten South Africa in its group match.

The future media value of rugby will, according to Hill, depend partly on the extent to which rights holders commit to developing the game of sevens and how sevens rights are made available and packaged. Sevens works better as a sport for warmer weather. Harder grounds suit running games, as English rugby league discovered when it shifted seasons. And sevens is a ‘carnival’ sport that draws outdoor crowds.

If sevens is positioned as a summer sport, it creates a year-round event for broadcasters, complementing the winter game of fifteens. Sevens coverage could be transformed by many of the broadcast innovations discussed on page 23, and also benefits, like all sport, from the long-run trend towards more lightweight and less expensive live broadcast technology.



Sponsors are also starting to view the two forms of the game as complementary. We're seeing sponsors acquire rights to both the Rugby World Cup and the HSBC Sevens Series, to enable a continuing relationship with the sport between World Cup tournaments. Two forms of the game do not necessarily mean double the revenue, however. In some markets, sevens broadcast rights are being 'bundled' with other rugby rights—and, in some, discounted to help build the sevens' audience.

Of course, the way that audiences watch is also changing. Sports audiences are moving to smartphone and tablet devices. In December 2015, according to comScore, 71% of sports channel ESPN's UK audience came exclusively from mobile, up from 58% in January 2015.

So, when the IOC's broadcasting agency Olympic Broadcasting Services (OBS) announced plans earlier this year to launch its own channel, to support the coverage of Olympic sports in the gaps between the Games, its focus was not the television set but the mobile screen. "We believe that this is the entry point for the demographic we're looking for," says OBS Chief Executive Yiannis Exarchos. "One of the key priorities... is to create content that is consistent and conducive to being used in the medium that younger generations use."

Rugby has already had some success in engaging this younger demographic. Teenagers (13- to 17-year olds) have been particularly engaged with rugby-related social media activity. World Rugby now has the largest social media following of any International Federation outside FIFA, and on top of building that engagement, effective social media strategy has helped to unlock greater commercial value from events. It has also created new

Rugby partnered with Twitter during the 2015 World Cup to create digital impact for the competition.

Twitter users deployed exclusive RWC emojis and sent 4.2 million tweets with the hashtag #RWC2015.

Part of the strategy was to use social media to connect players and fans. Throughout the group stages of the RWC, Twitter users could vote for the Man of the Match: viewers and spectators were given the chance to recognise the talent of some less well-known players such as Georgia's Mamuka Gorgodze.

Vine creators, meanwhile, captured atmospheric snippets of Twickenham at the opening ceremony, bringing the scene to viewers around the world through the eyes of the fans present. Twitter's long-form video platform, Amplify, was also used, in a partnership between ITV and Samsung, to share non-match footage.



Mamuka Gorgodze was chosen by Twitter users as Man of the Match in the Georgia-South Africa game

types of partnership: video clips published on Twitter during games referenced both the host broadcaster, ITV, and Twitter sponsor, Samsung.

It's clear that the development of sevens has huge potential in an age of limited attention spans and avid social media use. Bill Pulver, CEO of the Australian Rugby Union, observes that the short form of the game draws in "a much younger demographic, both in terms of fan and player base." It's therefore critical strategically to the development of the game. This younger audience was part of rugby's appeal for the IOC, as Michael Johnson notes. Engaging young audiences in the way that sevens does clearly aligns with the IOC's agenda. But developing a short and dynamic form of any sport comes with risks.

These are best exemplified by Twenty20 cricket, the latest step in developing a more accessible form of a game that traditionally has demanded a considerable time commitment from the spectator. The impact has been mixed. The best Twenty20 players command top dollar in the Indian Premier League or Australia's Big Bash, and the short form has certainly encouraged more invention and faster scoring rates in the five-day Test matches. From an audience perspective, Twenty20 certainly pulls in the crowds. But it has also undermined the technical skills required to play traditional cricket, and, arguably, diminished the attractiveness of the long-form game to audiences.

**More than two and a half billion people watched at least 15 minutes of the 2012 Olympics in London**

World Rugby has been careful to manage the development of both forms of the game, and this has been a core part of the governing body's strategy for a decade. In 2006, the management consultants Deloitte recommended after a strategic review of sevens that it had "a unique and important role" to play in rugby's future, its promotion and its performance development. One danger in this strategy is that as sevens builds its profile, attracts more funding from more sources and becomes more professionalised, it pulls away from the fifteens game, with different cadres of players and different media relationships.

But for World Rugby, this risk is outweighed by a larger risk—the risk that, as with one-day cricket in the era of the media mogul Kerry Packer, a television company creates its own rival tournament, packaged for the sports TV market, and scoops up the sevens audience that World Rugby and its partners have worked to create. The numbers are attractive: last year, the HSBC World Rugby Sevens Series clocked up almost 6,000 broadcast hours across various networks.

The way to prevent this happening, of course, is to run a first-class tournament yourself, with marquee sponsors and strong broadcast partners. There are good reasons to develop the formats in parallel. The audience experience of the two forms of the game is very different: sevens is more of a travelling show, a weekend carnival, with a host of teams in town and a social media buzz around the overall event.

## **A 21st century sport**

One of the curiosities of leisure in the 21st century is that as everything becomes more available digitally, so the experience of being there becomes more important, not less so. It becomes increasingly important that the live experience is memorable even as the audio-visual experience becomes richer and more immersive. Part of making a live experience memorable is sharing it. Clips and photos are social currency. And in a world of selfies, the players are also part of the social exchange.

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*Continued on page 24*

# Getting closer to the action



The aim of sports broadcasters is always to get the fan closer to the action—and increasingly this is true whether they're at home or in the stadium. The experience of TV viewing has got far richer as screens have got larger and high definition has become commonplace.

As a recent *SportsPro* report on broadcast technology puts it, "Broadcasters are increasingly focussing their concerns on the variety of shots or imagery they can provide to immerse the viewer in the experience."

One element of improved viewer experience has been miniaturisation. Cameras such as GoPro are now small enough and light enough to be worn on clothing, and robust enough to survive contact. If the difference between professional and amateur sport is speed, power and precision, miniaturisation gives viewers a better idea of what it feels like to be in the middle of that.

Another element has been the use of technology to create new perspectives. Rallying is experimenting with using drones to follow cars from above, supplementing the overhead helicopter, while stadia-based sports have adopted the spidercam—controversially in the case of cricket, where it has interfered with play in more than one international match.

"No other technology," notes *SportsPro*, "lets a camera get so close to a group of players on the pitch." Similarly, 360-degree coverage, combining multiple camera angles

and intensive processing power, can let the fan shift their perspective on the action by tilting or turning their device. Increasingly, sports coverage is being redesigned to maximise that visual experience.

A third area of innovation is the collection, synthesis and visualisation of game data, often in real time, allowing broadcasters to show heat maps of player or team performance. A whole host of tech companies that started with professional sports coaches as their target customers—companies such as ProZone, Opta, SportsVu, Hawk-Eye (known for its imaging technology, used in tennis and cricket), and Trackchamp—are delivering this same data to fans as well. In this they are following a long-term trend that sees professional tools and expertise migrate to the informed consumer.

Samsung has released a smart TV app, Sports Live, that allows the fan to personalise the data streams coming from a sports match, while a US technology, SportsVU, allows fans watching live on court to call up basketball stats to their smartphones.

Down the line, for the hardcore fan, much deeper immersion is waiting. Virtual reality and 360-degree cameras will let the fan see the action as if from the middle of the pitch, while wearable 'haptic' technology capable of delivering real-time 'tactile feedback' will let them feel the shock of the tackle, the stress of taking a high-pressure kick and the excitement of scoring a try.

This is one of the reasons why we are disappointed when players turn out to be less than they seem, and conversely, excited when the opposite happens, as when Sonny Bill Williams gave his Rugby World Cup winner's medal to a young fan. The players are also part of the digital currency of fantasy sports and leagues.

There is a further element to this as well: sport, like music, is reshaping itself to fit the rhythms and experience of festival culture, with greater emphasis on the things you don't experience if you watch on a screen.

Putting all of this together, we see a sports future where the live experience is more distinctive than ever, where the digital fragments are more ubiquitous, and one where, as fans, we want our sports performers to be more superhuman on the pitch and more human off it. It is a set of paradoxes that sevens is well positioned to resolve.

The sevens tournament format, for example, lends itself well to this new style of event-based 'festival' leisure, with opportunities to socialise between the highs of the action. Yet many of the highlights are compressed enough to be perfectly suited to the increasingly visual world of social media—tricks or flicks, or moments of pure speed or abrasive contact.

And the game itself is lung-busting: like track cycling, athletes who succeed in sevens do so by being able to perform way beyond their thresholds, and then recover quickly enough to do it over again.

Finally, the structure of the sevens tournament creates an intimacy between fans and players. Every team plays multiple games during a tournament, and players practise in public between games. The top teams and the top stars aren't like rock bands and rock stars: they don't get helicoptered away after they've performed.

Almost all the ingredients, then, are in place for sevens to be the template for 21st century sport. The final element is the development of broadcast coverage that captures the excitement of the spectator experience, and innovation that brings that to life, which will in turn build new audiences for the game.

The Olympic opportunity has already energised sevens and rugby beyond expectation. If it connects the sport to new audiences, and through them to broadcasters, it will be the spark that ignites a truly global future.

**Twenty20 has driven explosive growth in cricket match attendance: a record 80,883 watched the Melbourne Stars v Renegades this year, the largest audience ever for a domestic cricket match.**





“For many years, I had friends say: ‘What is this game you play?’ And now they get it... Hopefully, we’ll have sponsors who will want to work with us now they’ve seen the event. It’s tangible. With TSN as our broadcast partner, it’s brought new eyeballs to the game, and we want kids asking parents if they can play rugby, rather than just ice hockey or soccer.”

## **Gareth Rees, former captain of Canada, now Commercial Director of Rugby Canada**

The Future of Rugby was written by Andrew Curry, Victoria Heptonstall and Charlie Warwick of The Futures Company, and edited by Caroline Passmore.

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