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**ECONOMIC IMPACT REPORT ON GLOBAL RUGBY
PART III: STRATEGIC AND EMERGING MARKETS**

Commissioned by MasterCard Worldwide

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Highlights

- More than 5 million people play rugby in over 117 countries.
- Participation in rugby worldwide has increased 19% since the last Rugby World Cup in 2007.
- Participation figures are highest in Europe, but there are significant numbers of players elsewhere, with increasing numbers in emerging markets.
- Since 2007 participation has grown by 33% in Africa, 22% in South America and 18% in Asia and North America.
- In terms of participation, Japan, Sri Lanka and Argentina now feature in the top ten countries, which bodes well as there is a strong, positive correlation between participation and performance.
- These unprecedented levels of growth can be attributed to three main factors:
 - Developments in non-traditional game formats, particularly Sevens Rugby's inclusion in the Olympic program from 2016.
 - Event hosting strategies often with linked legacy programs.
 - IRB programs and investment. £153 million (USD245.6 million) is being invested from 2009 to 2012, an increase of 20% over the previous funding cycle.

Introduction

Following Six Nations and Tri Nations reports, MasterCard commissioned the Centre for the International Business of Sport (CIBS) to look at rugby in emerging markets. This report provides an introduction to some key markets for rugby, offering insight into the development of the game in non-traditional areas.

While traditionally rugby has been concentrated in relatively small pockets, it is widely accepted that the future strength and development of the sport is dependent on achieving a higher level of competitive balance between the developed and emerging rugby nations.

There are currently over 5 million rugby players in 117 countries and the IRB is committed to continue to inspire new generations to play and watch the sport. With worldwide growth of over 19% since 2007, the game is in a healthy state with participation now spreading through new territories and across demographics in emerging markets. With participation growth paramount to the diffusion and popularity of the game, the IRB is investing £153 million (USD245.6 million) between 2009 – 2012 through strategic programs and union grants to focus specifically on increasing participation, performance, recruitment and retention of players.

Worldwide rugby development is primarily funded by Rugby World Cup revenue, which accounts for 95% of all money distributed by the IRB for development. Funds available for investment have therefore increased significantly as RWC has grown and developed as a commercial property, becoming the world's third largest sporting event, behind only the Olympic Games and the FIFA World Cup.

These huge increases have also been linked to revenue generation with a £1 million (USD1.60 million) surplus in 1987 rising to £122.4 million (USD196.5 million) in 2007. The IRB is investing in targeted high performance initiatives in 22 countries with an investment of £48 million (USD77 million) over the period 2009-2012, to its annual expenditure on annual Union grants, tournament funding and education and training program expenditure. Annual expenditure has increased 20% from £10 million (USD16 million) to £12 million (USD19.27 million) per year, two-thirds of which funds high performance initiatives in Tier 2 and 3 nations.

An IRB Major Markets Fund has also been announced to invest specifically in Brazil, India, China and Mexico with continued High Performance funding in Argentina. Japan’s hosting of the 2019 Rugby World Cup will bring the competition to mainland Asia for the first time, and it is expected to make a huge impact on the sport’s growth.

Sevens rugby is currently benefiting from unprecedented coverage, attracting record viewing figures for the IRB Sevens World Series event. Media rights distributors Pro-Active Television reported recently that for a fifth consecutive year, a record global audience tuned in to watch the 2009-10 series. Coverage of the eight-tournament Series reached 141 countries across six continents via 34 broadcasters, accumulating 3,561 hours of total airtime – seven per cent up on the 2008/09 season which had smashed all previous figures.

In addition to generating publicity and interest, the admission of Sevens Rugby into the Olympic program allows the sport to access government funding. In the USA, for example, USA Rugby has been formally made an Olympic Sport member of the United States Olympic Committee (USOC) meaning rugby players can now use the Olympic training facilities and various government funds which are only available to Olympic athletes. Rugby is now being taught as an “Olympic sport” in schools in China, the USA, and Russia.

At the micro level, while the ten top playing nations in terms of participation in 2008 were the traditional Six Nations and Tri Nations sides plus Argentina¹, this picture is changing, with Japan, Sri Lanka and the USA all featuring in the top ten for 2010. The game’s development worldwide has been huge since the last Rugby World Cup, while new game formats have proven particularly popular in bringing rugby to new areas.

Rugby Playing Nations by Participation in 2010

	Number Of Registered Players	Adult	Youth	Mini	Total Male Player	Total Female Player
England	2,549,196*	172,079	1,553,704	823,413	2,531,705	17,491
South Africa	632,184	118,120	198,175	315,889	614,787	17,397
France	273,084	116,282	52,644	144,951	302,023	11,854
Ireland	153,080	28,204	60,567	64,309	140,716	12,364
New Zealand	137,835	28,288	42,280	67,267	126,146	11,689
Japan	122,598	53,416	41,722	27,460	121,543	1,055
Sri Lanka	103,325	4,505	49,510	49,310	87,602	15,723
Argentina	102,790	19,641	36,348	46,801	102,543	247
Australia	86,952	41,049	19,239	26,664	85,283	1,669
USA	81,678	44,544	34,918	2,216	60,954	20,724

Source: IRB

*This number reflects people engaged in rugby activity in England. This figure has not been independently verified by the IRB at the time of going to press.

¹ RFU Strategic Plan 2008

Highlights - Strategic Markets

China

- Participation has increased by 13% since 2009 to 4,810.
- Currently rugby has little commercial value in China.
- Popularity has grown since Sevens was added to the Olympic program.
- Sevens has been added to the 2013 Chinese National Games program and will be included in the national development system aimed at developing elite athletes.
- A growing number of provinces now organize Sevens teams, as well as schools and universities.
- The 2010 Asian Games in Guangzhou attracted over 80,000 spectators to watch the Sevens Rugby competition.
- The Chinese Women's Sevens team has been more successful than the Men's team. It is one of top ranked women's sides in Asia but lost to Kazakhstan in finals of the Asian Games.
- Participation has increased by 13% since 2009 to 4,810.
- Some 89% of participants in China are male and they tend to be over 20 years old.

Japan

- Japan has been awarded the rights to host the Rugby World Cup 2019. This will be the first time the tournament will be held outside of a traditional rugby nation and the first time it will be hosted in Asia.
- The Rugby World Cup 2019 is expected to be a conduit for further development and expansion of the game throughout Asia.
- Estimates suggest that Japan could generate £1.64 billion (US\$ 2.63 billion) from hosting the tournament.
- A professional rugby league (Top League) was established in 2003, with most clubs owned by large Japanese corporations. Average attendance in 2010 was 4,529 per game.
- In 2009 the market for rugby merchandise was worth ¥1.5 billion (USD18.5 billion), approximately 1% of the total sports merchandising market in Japan)
- Japan has the largest number of rugby participants of all of the Asian nations (122,598)
- Some 99% of players are male, 44% of players are seniors.

USA

- The USA has an estimated 65,000 active participants and 90,000 USA Rugby members. Some 45% of participants are under 18 years old, and 25% of participants are female.
- There has been a 350% increase in rugby participation in the USA since 2004, but it is still thought of as a niche, amateur sport.
- Rugby has generated staggering growth in terms of economic impact:
 - The 2007 US Sevens International tournament held in Petco Park, San Diego had an estimated impact of USD625,000. This increased to UD\$1.04 million in 2008.
 - In 2010 the tournament moved to Las Vegas and was estimated to have a non-gaming economic impact of USD\$17 million for the city.² Some 18,000 spectators attended the final match.
- Growing interest is reflected by broadcast deals recently concluded – NBC and Universal have acquired full multi-platform broadcast rights for the Rugby World Cups 2011 and 2015, marking the first time the Tournament will be shown live on US network television.

² Las Vegas Convention and Visitors Authority

- The current fan base in the USA is estimated to be 300,000-400,000 (1% of the population), but significant growth is expected over the next 3 – 5 years.

Strategic Markets - Focus

CHINA: Olympic Sevens key to sport's growth

Currently only 7% of the world's rugby participants are based in Asia, and with a population of 1.3 billion, China, one of the key emerging markets for Rugby Union, continues to face some big cultural and organizational challenges.

Participation in China has increased 13% since 2009. However, there are no more than 5,000 who regularly play the sport. The country has taken steps to popularize rugby through the inclusion of Sevens in the schedule for the 2013 Chinese National Games. The move is part of its goal of medal success at the 2016 Olympic Games, which will feature Sevens for this first time in its history.

The 2010 Asian Games in Guangzhou attracted over 80,000 spectators to watch the Sevens Rugby competition. The IRB invested in key areas to ensure the smooth operation of the rugby tournament: technical professionals were recruited to train and develop over 60 Chinese technical and event staff to officiate at the rugby event. A concerted effort has been made to develop Asian match officials rather than bringing in referees from outside the country.

Mr. Xiaoning Zhang, director of the Multi Ball Sports Administration Centre (MBSAC) said the inclusion of Sevens in the Chinese National Games would open up prospects for many Chinese provinces to recruit their own provincial teams. China currently has about 30 organized rugby clubs and none of them have significant commercial value to develop.

Sports funding in China does not favour minority sports, with resources channelled to 17,000 performing athletes, those that represent the best chance of global recognition. The current system produces a large number of Olympic medallists but a small amount of sponsorship and endorsement options.

Lack of public awareness and interest directly reduces rugby's business and marketing value in China. So far, the only known case for China Rugby Association to acquire notable sponsorship happened in 2008 when Guinness through its local distributor cut a deal for an undisclosed amount for title sponsorship. However the details of the execution of the deal remain unknown and Chinese players were never seen wearing Guinness logos on their shirts. Some observers question whether the deal was actually executed.

Rugby is considered to have compelling selling points in China as the Chinese modernize their ideas. Teamwork, camaraderie, playing by rules, and respecting opponents and referees are considered good values for Chinese youth to have as they aim to prosper in a society increasingly incorporating modern social values. While rugby has traditionally been viewed as a rough, man's game that was difficult to understand and dangerous to play, this image is gradually being replaced as more accessible forms of the game, such as Sevens and tag rugby have helped to attract new fans to both watch and participate.

JAPAN: Rugby World Cup 2019 a launchpad for Asia

While rugby still lags behind football and baseball in terms of popularity in Japan, the securing of the Rugby World Cup 2019 hosting rights is likely to change the sports profile. Hosting the sport's marquee

event outside of the traditional Six Nations and Tri Nation countries will have a significant impact on Asia, estimated by Deloitte at around \$2 billion. But with the broader appeal of the competition - it has been proposed that matches could take place in Hong Kong and Singapore - the IRB expects the tournament to create a lasting legacy for the sport across Asia.

Parallels have been drawn with the Japanese and Korean hosting of the 2002 FIFA World Cup, which built a lasting legacy by creating better sports facilities as well as generating more enthusiasm for the game and recognition of high quality players with the high profile transfers of some of their leading players to European clubs.

While Japan is currently Asia's highest ranked nation (14), it still lags behind its European, Oceanic and South African counterparts in terms of competitiveness, having failed to make it past the group stages in the Rugby World Cup 2007. It is hoped that the 2019 tournament will be a conduit for the game's local development.

Japan has a flourishing professional rugby league (Top League), which was established in 2003, with most clubs owned by large Japanese corporations. Average attendance in 2010 was 4,529 per game. In 2009 the market for rugby merchandise was worth ¥1.5 billion (USD18.5 billion), approximately 1% of the total sports merchandising market in Japan).

Coverage of the sport is already very good in the country. From 2009 to 2010, 43 live and 34 recorded league matches were shown on Japanese TV. Japanese rugby is also shown around the world. Sky New Zealand broadcasts 13 league matches per season and three play-off matches. Participation is also high in Japan, with 122,598 registered players.

US: Broadcasting deals a marker of engagement

Always viewed as a niche amateur sport, rugby is experiencing growth in the US through its national collegiate championships and youth rugby, which has grown 350% over the past six years. In the current strategic plan for USA Rugby, their plan is to raise membership by over 60% to 136,000 by August 2012. The current fan base in the USA is estimated to be 300,000-400,000 (1% of the population), but significant growth is expected over the next 3 – 5 years.

As with other countries, Sevens Rugby has brought new audiences and revenue to the game. The US Sevens International Rugby Tournament, held at Petco Park in San Diego, had an estimated economic impact of USD625,000 in 2007 and USD1.04 million in 2008 (*San Diego Business Journal, 2009*). The decision to move the US Sevens leg of the World Sevens Series to Las Vegas in 2010, has paid dividends. According to the Las Vegas Convention and Visitors Authority, "[The tournament will bring] USD\$17 million non-gaming economic impact for our city." The final between Samoa and New Zealand also drew a crowd of 18,000 people.

In the US, where rugby has to compete alongside several national sports such as the NFL, baseball and basketball, broadcasters are showing more of an interest in the sport as well. National broadcaster NBC has agreed to broadcast the USA 7's National Collegiate Rugby Championships on 4-5 June 2011, and signed a contract with the International Rugby Board to provide full multi-platform (broadcast, television and online media) coverage of the Rugby World Cup 2011 from New Zealand.

NBC Sports and Universal Sports will also broadcast eight hours of live rugby coverage of the 2011 HSBC Sevens World Series event in Las Vegas, marking the first time the tournament will be covered live on television in the United States.

This agreement also extends to the Rugby World Cup 2015 in England. Other cable television channels have also starting broadcasting rugby in the United States, including Fox Soccer Plus (various leagues around the world); BBC America (Six Nations); Spike (Australian Rugby League); and ESPN (college rugby).

In 2002/3, the RFU entered into a strategic development agreement with Rugby Canada and USA Rugby, with IRB endorsement, to provide a resource and support package for the development of rugby in North America which is intended to help support the development of coaches and referees as well as players, and includes the provision of a small number of scholarships for North American players to attend RFU rugby academies³. The increases in participation experienced in both Canada and the USA over the last decade is testament to the success of such initiatives in providing support and resources as well as vital experience in order to aid the development of the sport.

Rugby's Emerging Nations

Europe

Russia: IRB targets Eastern promise

Russia is currently ranked 18th by the IRB and classified as a Tier 3 nation. It has made good progress in developing players in recent years, having qualified for the Rugby World Cup 2011. The domestic federation has high hopes for rugby Sevens too, aiming to establish itself as a top 12 side by 2015.

The IRB has recognized the huge potential of Russia as a rugby playing nation and in the 2009-2012 cycle Russia will benefit from a capital injection of £1.1 million⁴ (USD1.76 million) which is set to be used to further develop infrastructure and competitions. This will be the first time IRB is injecting capital into Russia. Russia has embarked on a program of diffusion of the game via the hosting of a number of major events.

The IRB Junior World Championship was successfully hosted in 2010 with good crowds attending the event. It was the first IRB 15-a-side tournament to be held in the country and showcased high quality international rugby to the Russian public. It was also used as a springboard to develop key legacy programs aimed at attracting young people to the game.

The hosting strategy continues with the award of the Rugby World Cup Sevens 2013 to Moscow. The Russian government has committed to building new rugby stadia as they prepare to host the Tournament. Hosting world class events in Russia not only enables fans to see top quality players, but also provides a boost for development across the region, with widespread media and broadcast coverage around the world.

There are 14,519 registered players in Russia – the highest of any of the Eastern European nations. Participation is still relatively male dominated, with female players only accounting for 8% of the total. As would be expected, since the diffusion of the game is focused on the development of young players and building for the future, 73% of the players are under 20 years old, with over half of the players teenagers (53%). 72% of the female players are teenagers, which also suggests that the women's game will develop.

³ RFU Annual Report 2008

⁴ IRB Announces Record Investment Program, May 12th 2008, IRB.com

Georgia, Romania: Using RWC 2011 as a springboard

Georgia is currently a Tier 3 nation and as such competes in the European Nations Cup. Their playing achievements have been recognized after winning this cup on three occasions and also due to their exceptional performance at the Rugby World Cup in 2007 which surpassed the expectations of most people, increasing the popularity of the sport. In turn, this was recognized by the media who helped to increase the visibility of the sport domestically. The national TV and radio broadcaster, Georgian Public Broadcasting is a media partner of the GRU and as such coverage of the sport is good.

The Georgian public are passionate about the sport and attend matches in relatively high numbers. 6,000 fans travelled to see Georgia play Russia in Turkey recently. This represented 95% of the crowd attending the match.

Funding from the IRB has been increased substantially for Georgia in the current funding cycle (2009-2012) to £1.7 million (USD 2.73 million), with a significant amount of front loading to enable infrastructure development. Georgia has recently been awarded the rights to host the IRB Junior World Trophy 2011, marking the first time that the country has been selected to host a major rugby competition.

An IRB funded national academy was opened in November 2010, while £6 million (USD 9.64 million) has been committed by the Georgian government to fund the growth of rugby. According to the President of the Georgian Rugby Union, George Nijaradze, rugby is the country's number one team sport⁵. A good performance in the Rugby World Cup would also create even more interest in what is already one of the country's most popular sports.

Romania has become an important nation in rugby terms and is showing signs of growth in playing ability and participation rates. 94% of registered participants in Romania are male, the majority of whom are pre teen (54%) reflecting the good work of the governing bodies in attracting children to the game.

Romania is currently placed 19th in the IRB rankings. It is classed as a Tier 2 nation and has recently benefited from increased IRB funding, receiving £2.1 million (USD 3.37 million) over the 2009-2012 cycle. Romania's national team players are sought after across many of the main professional leagues overseas in France, Italy and England. Romanian rugby has been successful in establishing a good structure for the game in the country with 83 registered clubs and 199 trained referees.

The success of the national team can be used as a conduit to attract further interest in rugby. For example, before the Rugby World Cup 2011 qualifying game between Romania and Uruguay, the national federation organized seven of the FFR's IRB licensed coach educators to deliver an IRB-FIRA-AER/FFR Level 1 Sevens coaching course to 26 delegates who came from throughout Romania. Further coaching and strength and conditioning workshops were delivered the day after the match to twelve Romanian coaches⁶. This sort of skills development and diffusion is crucial for the growth of the sport.

It is recognized that for Tier 2 nations such as Romania to develop further, there needs to be high quality opposition to play. Romania has hosted the IRB Nations Cup on three consecutive occasions (2007 – 2009), the objective of which is to provide Tier 2 and 3 nations with meaningful competition against the A Teams of Tier 1 unions. The tournament is well attended by locals and also attracts a good television audience – which means the country is promoted to a worldwide audience. The 2009 tournament was televised live and broadcast to 150 million homes in Europe, South America, North America, Asia, South Africa, Australia, New Zealand and the Middle East⁷.

⁵ *ibid*

⁶ Romania – Training Courses, www.fira-aer-rugby.com/article-70.htm

⁷ Romania Gears Up for Nations Cup, June 11th 2009, 1rb.com

The French bank, Societe Generale, is committed to the development of Romanian rugby and the IRB nations Cup. During the 2009 tournament, the bank presented the President of the FFR with a cheque for 300,000 RON (USD104,833)⁸. KIA, South Korea's second largest automobile manufacturer, is another major sponsor.

Africa

Rugby continues to consolidate its foothold in Africa. Home to rugby's highest ranked nation (South Africa), Africa has a strong rugby tradition. Traditionally it has been perceived as a sport for the wealthy but participation has increased in new markets. As well as South Africa; Kenya, Zimbabwe, Madagascar and Tunisia all feature in the top quartile in terms of rugby participating nations in Africa.

With a 33% increase in participation rates across Africa since the last World Cup in 2007, the continent is demonstrating great signs of expansion. In 2002, 12 nations were involved in Africa's rugby tournaments. This had increased to 36 by 2009 (IRB), many of which are not IRB members. Seeds have been sown for a larger expansion of the game - 80% of the continent's players are under 20 years old.

Kenya: The Continent's rising star

Rugby has arguably grown to become the most popular sport in Kenya today, largely through the incredible success of the Kenyan Sevens team, and local and international tournaments such as the Safari Sevens.

Kenya is currently ranked 33 in the IRB standings, but it is Sevens which has generated the most international success, and is reaching all parts of the community, leading to a debate as to whether Kenya should focus on Sevens instead of fifteen-a-side rugby in an effort to generate more success. The Sevens team competes in the IRB Sevens World Series and Rugby World Cup Sevens. They are currently one of the 12 "core teams" of the IRB Sevens, with a guaranteed place in all eight events each season.

As part of its development strategy, the KRFU also hosts events. The Safari Sevens is arguably the greatest and most attended sports event in Kenya to date. Started in 1996, the tournament has seen crowds grow from around 3,000 people in 1997 to over 21,000 in 2010 across the three-day event, amassing gate receipts of €152,886 (USD213,544) compared to €107,919 (USD 150,744) from 15,000 spectators in 2009. The event was sponsored by Safaricom in a deal thought to be worth €224,833 (USD314,053).

Kenya's hosting of the IRB Junior World Rugby Trophy, in Nairobi in 2009 has had a huge impact on the development of the game. While before the tournament the average player was introduced to the game at age 14 or 15, part of the tournament's legacy has been to engage with younger people. Rugby was introduced for the first time in the history of Kenya into the curriculum of sports in June 2009. This has had a major impact on development of the game.

There is also need to capitalise on the gains made by developments to date. Kenyan rugby has huge potential, and engaging the nation's best players to help with coaching children is certainly a positive step. Hosting international tournaments will increase the engagement of local observers, while the continued improvement of the national side makes it more attractive for the media. Further success in multi-sport events would provide a huge boost to the sport.

⁸ ibid

Central & South America

Chile, Mexico and the Caribbean: Developing rugby's new nations

Chile currently has 16,724 registered players, 75% of which are under 20 years old. In September 2010 Tonga played Chile in Santiago, in the first match between the two nations. The day after the match Tonga players delivered a rugby workshop which was attended by around 400 boys in La Pintana – a high poverty area in the Chilean capital at Nosedal School⁹. This was the third time an international workshop was delivered at the school following visits from the Georgia team in 2008 and an English team.

These visits have been facilitated by the IRB Legacy Program and Chile Rugby Federation. The Federation in Chile has put measures in place to continue this development by training the school's PE teachers to help them cope with the increased demand for rugby participation. Other programs in the country have also encouraged girls to take up the sport.

In Central America Mexico has also been identified by the IRB as one of the markets with the most potential for development and though participation figures are currently relatively low, there has been a huge increase in participation of 40% over the last year. After nearly dying out during an economic crisis in the 1990s, rugby in Mexico is enjoying a renaissance, fuelled by its inclusion in the Pan American Games program. Mexico hosted the regional Rugby Sevens Championships in 2009, the first tournament of its sort to be hosted in the country. The Mexican city of Guadalajara will host the Pan American Games in 2011 where Rugby Sevens will feature as a participation sport.

Rugby featured for the first time in the CASCO (Central American and Caribbean Sports Organisation) Games in 2010. The tournament showcased the collaborative commitment between IRB and North America Caribbean Rugby Association (NACRA) aimed at developing the game across the region. The IRB invests over US\$5 million in targeted programs annually around the region. While Guyana has traditionally dominated Men's Sevens in the region, the sport has recently enjoyed a higher degree of competitive balance with the gap narrowed by Jamaica and Trinidad and Tobago in particular.

Asia

The IRB invests over USD\$3 million annually in development, high performance, and tournament programs in collaboration with Asian Rugby Football Union (ARFU)¹⁰. While as recently as 2002 membership of the AFRU was only 15, this has now increased to 28, and the continent's IRB membership has grown from 11 to 22¹¹.

Asian rugby's marquee event - the Hong Kong Sevens - is now classed as one of the biggest events on the sporting calendar. With a prize fund of USD150,000, commercially it is the most successful of the eight annual Sevens tournaments in the IRB Series and according to Tournament Director Warwick Dent, the event generates considerably more than USD40 million for the Hong Kong economy even before corporate events and hospitality are considered.

Hosting Bledisloe Cup matches and Sevens competitions has meant increased coverage for the sport – particularly following its inclusion in multi-sport games. Sevens has been introduced in the Asian Games

⁹ Tonga leave their legacy in Santiago, accessed at www.irb.com/newsmedia/features/newsid=2040504.html

¹⁰ Japan to Host IRB Pacific Nations Cup 2011, December 16th 2010, available at http://www.oceaniarugby.com/101216_japan_to_host_irb_pacific_nations_cup_2011.html/ref/267

¹¹ <http://www.aroundtherings.com/articles/view.aspx?id=36009>

and Commonwealth Games. Women's rugby was introduced into SEA Games in 2007 in Korat, Thailand and in the 2009 East Asian Games in Hong Kong.

In the 2010 Asian Games, the 35,000-seater rugby stadium was close to full capacity throughout the event with over 30,000 fans per day watching the men's and women's Sevens events in Guangzhou, China and over 80,000 watching the Sevens games in total, reflecting some of the highest crowds for any sport at the Games and the largest rugby crowd in the history of the Asian Games¹².

Pakistan: Rugby participation surges 250%

In Pakistan the popularity of rugby has risen in recent years, participation in particular has been impressive, quadrupling over the past two years, with an increase of 250% in the last year alone. Rugby has now been introduced at the Provincial and District level by the Pakistan Rugby Union and schools have also been important areas for promoting the game. The success of these schemes has helped in forming the Pakistan under-19 team which participated in the Asian Under-19 Championship at Lahore.

The game has attracted increased participation at the club, school and university level, and has been taken up by the Army and Police, and departmental set-ups such as WAPDA and the HEC. Consequently, while it was originally focussed in specific areas, there is now a greater presence in all provinces.

India: Commonwealth Games leaves lasting legacy

India currently has 17,874 registered players, making it the fourth highest Asia country in terms of participants, and has seen a 25% growth in participation over the last year.

The International Rugby Board views India and China as potential rugby playing nations. The Indian Rugby Football Union (IRFU) has been promoting touch rugby in over 100 schools in India. Indian rugby has the propensity to develop quickly in the Sevens game and, with the interest generated by the Commonwealth Games, participation would be expected to increase over the next year. The infrastructure legacy in having appropriate places to play the game is also important and a lot of work has been done to engage with communities who have currently had little or no exposure to the sport.

Hosting the Commonwealth Games has left a rugby legacy for the country in terms of facilities and human resources with local officials trained especially for the competition, helping to create a sustainable rugby infrastructure as well as increased exposure for the sport. The Games also attracted capacity crowds of 10,000, in what was billed as the biggest ever gathering of the world's top ten international Sevens sides.

The number of clubs in India has doubled over the past two to three years. Rugby is now however being played in Chennai, Bangalore, Pondicherry, Bhubaneswar, Manipur, Assam, Delhi, Haryana, J&K (Srinagar), Pune and several of the army nodes like Ahmednagar, Bangalore and Ambala. Development of Indian rugby is also receiving support from BARA, a British-based rugby organization helping to encourage rugby amongst the Indian and Pakistani communities. This is being spearheaded by Britain's first South Asian player in rugby league, Ikram Bhutt.

While the women's national side are not currently ranked, the number of girls participating at junior levels is very encouraging.

¹² www.irbsevens.com/regionalsports/newsid=2040913.html

Sri Lanka: Schools policy enhancing growth

Participation in Sri Lanka is the second highest in Asia behind Japan and in the top ten nations in the world. The vast majority of players are male (85%), but there are still many more female players than there are to be found in other nations.

The main aim of the Sri Lankan Rugby Football Union (SLRFU) is to assist schools in playing rugby. With the appointment of development officers and technical officers for the provinces, around 50 to 125 schools per province have been engaged, with efficient provinces having even more schools. Rugby has been included in the national curriculum since July 2010, thereby making it a national sport.

The governing body has set out in its strategic plan the intention to have 400 schools per province by the end of this year playing rugby, increasing to 1200 schools per province at the end of the 3rd year, which would amount to 8400 schools in total, all playing at the Under-8 through Under-20 levels. Although this plan is ambitious, facilitated by the Provincial Education Ministries, which will provide the necessary manpower, it is possible.

While Sri Lankan rugby has developed over recent years, there is concern that domestic structures and training programs are not sufficient to develop elite players to win on a worldwide scene. Though Sevens rugby is suggested to be better suited for teams like Sri Lanka, it is necessary to still have mechanisms in place to expose the players to high level competition and training. Over the last year, many of the best players have also been unavailable to play for their national team due to other work commitments. Without a professional structure for the sport in place it is difficult to solve some of these problems.

Iran: Rugby reaching far and wide

Iran became an IRB Associate Member on November 25th 2010 having joined the ARFU in 2005. A string of improving results makes it a growing force in the West Asia Region and it currently has over 1,700 registered players, while the national senior men's team was the HSBC Asian 5 Nations Division 3 champions in 2010. Today rugby is played in fifteen of Iran's thirty provinces.

In 2009, the Kish Island Rugby Sevens event was organized by the Iran Rugby Federation as part of the Asian Sevens series circuit under the auspices of the ARFU.

Even though it was not a ranked event, the tournament was a great success in terms of the rugby development efforts across the region as the two finals were broadcast live on Iran TV and on five other networks throughout Iran and the Middle East¹³. This was the first time that rugby had been shown on TV in the country.

Conclusion

Participation increases worldwide suggest that rugby is in good health. Growth has been seen not only in traditional rugby regions (22% increase in participation in Europe since 2007), but also in emerging markets.

The addition of Sevens Rugby to the 2016 Olympics program has enabled it to become a national sport in many countries where it has been introduced into the school curriculum. It also affords players the opportunity to access additional sources of funding and facilities.

Sevens Rugby is proving particularly popular in emerging nations as it requires less equipment. The sport provides an opportunity for non traditional nations to achieve Olympic medal success. Hosting strategies have been employed in some nations to widen the popularity of the game, with the introduction of legacy strategies linked to development competitions having a key impact on sustainability.

Hosting high class events not only enables locals to experience the high quality spectacle of rugby but also provides the opportunity for the game to be showcased on national television and through various other media sources. Additionally, locals are often engaged through development programs run around competitions, thus leaving a legacy of facilities and trained coaches and officials.

The Commonwealth Games and Asian Games both attracted close to capacity crowds, with plenty of enthusiasm, for their rugby tournaments.

Japan hosting the first Rugby World Cup in Asia, and the first outside of a country that plays in the Six Nations or Tri Nations will act as a conduit for further development throughout the region: It has also been proposed that matches could take place in Hong Kong and Singapore.

The IRB has recognised key markets where rugby can expand and the revenues generated by the Rugby World Cup have enabled more money to be spent on developing these areas, with the aim of increasing the number of nations who could reach the final stages of the tournament in future.

Rugby's governing bodies recognize that sport can be used as a development tool and have linked legacy projects to local community initiatives which can impact health, community cohesion, environmental development as well as engaging a new generation of players and fans.