

January 2024



# State of Rugby Union: 2024 Australia Report

The views of Rugby Union fans.

**Dr Mike Turner**  
Director, Head of Research  
Freshwater Strategy

**Danilo Caforio**  
Senior Manager  
Freshwater Strategy

**Morgan James**  
Senior Consultant  
Freshwater Strategy

**Mitchell Parker-Wilkin**  
Associate  
Freshwater Strategy



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# Acknowledgment

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We would like to thank all those who participated in the State of Rugby Union: 2024 survey. We appreciate you giving up time to share your experiences and opinions.

Your feedback will help the entire Rugby Union community better understand the views of fans, and what they believe the future challenges are for the sport.

Your responses have helped us compile this report and its insights will go on to help us develop material that highlights the way in which Rugby Union and other sports, can progress in Australia.

We won't have covered all the issues, but we hope you'll find the contents of this report useful and feel a little more informed about the game we all love.

Dr Michael Turner  
Director, Head of Research

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# Methodology

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The survey was conducted online and achieved a sample of n=845 Rugby Union fans who live in Australia. This means that topline results will have a maximum margin of error of +/- 3.4%. Please note that sub-groups will have significantly larger margins of error.

The survey length was approximately 10 minutes with fieldwork conducted in December 2023. All survey results were anonymous.

Invitations were sent to Rugby Union clubs, specialist Union fans notice boards, social media groups and to nationally representative panels of Australian residents, in order to identify those fans less likely to be part of a club or social group.

Those who were not interested in Rugby Union, or lived abroad, were considered ineligible and screened out of the survey.

Freshwater Strategy, is a Company Partner of the Market Research Society and abides by their professional standards.

# Executive Summary

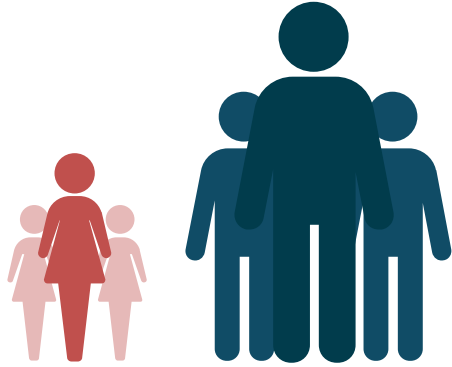
Here are a selection of key findings the report identifies:

1. Almost **two-thirds of Rugby Union fans (61%) say that the sport is heading in the wrong direction right now.**
2. More than **two-thirds of Rugby Union fans (69%) say that Rugby Australia is doing a poor job right now**, with many lacking confidence that the organisation understands how to get the game back on track (45%).
3. The overwhelming majority of Rugby Union fans say they are **dissatisfied with the current development of the grassroots systems (71%)**, clearly choosing to prioritise growth of the grassroots game over 'recruiting talent from other sporting codes' (87%) and 'ensuring that the Wallabies win more games (67%).
4. More **than one-quarter of Rugby Union fans in Australia (28%) support a national team other than the Wallabies**, with around one in five (21%) identifying as supporters of the All Blacks.
5. Many Rugby Union fans are also **highly engaged with other sports such as cricket (47%) and rugby league (41%)**, with a significant proportion also saying that they regularly watch these sports.
6. An overwhelming majority of Union fans **support the exits of both Hamish McLennan (71%) and Eddie Jones (68%)**.
7. Approximately three-quarters of fans (76%) agree that the **next Wallabies Head Coach should be given until after the next Rugby World Cup to show results.**
8. Four fifths of **Rugby Union fans (81%) want to see to see more fixtures.**
9. Although almost half of Rugby Union fans (47%) believe things will begin improve for Australian rugby over the next 12 months, many remain pessimistic about the Wallabies chances against the British & Irish Lions 2025. **Two-thirds (65%) believe that the Wallabies will lose the series.**
10. There is **overwhelming support for better retention of school-aged talent to continue playing Rugby Union (71%)** and a majority support lowering the tackle height to below the sternum (50%).

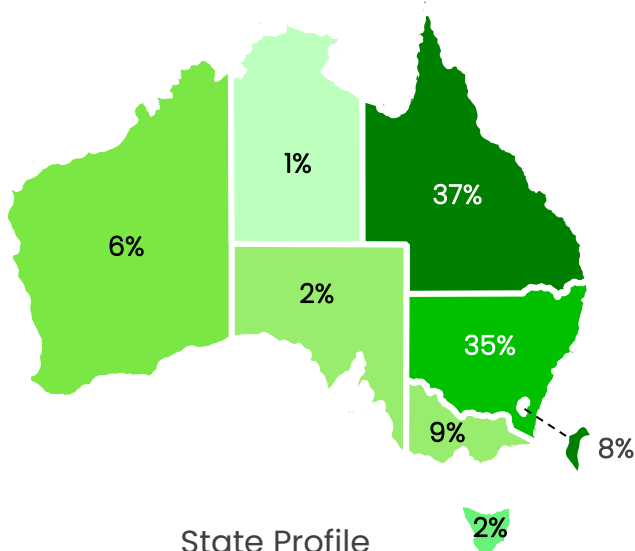
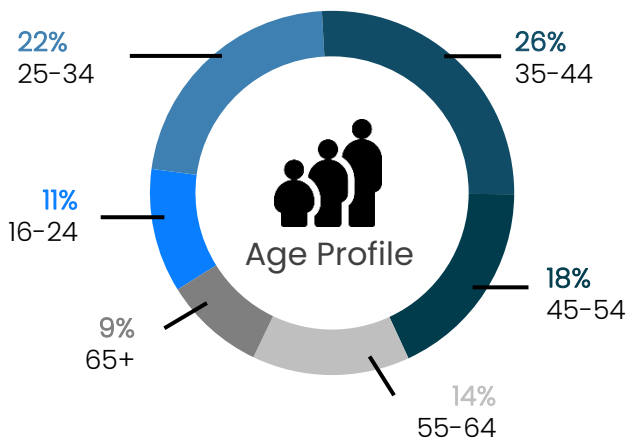
# Rugby Union Fans: Who are they?

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# Rugby Union Fans – Audience Profile



25% Female  
75% Male



## Income Profile

Average Australian Household Income

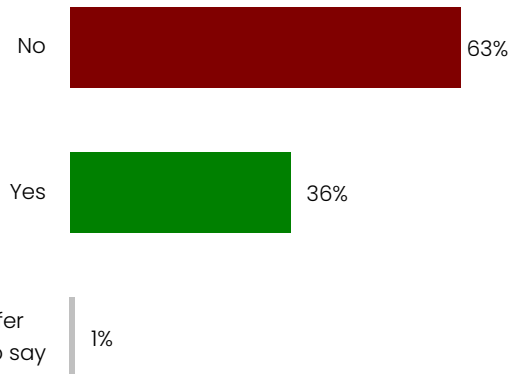
\$92,292 p.a.

Average Rugby Union Fan Household Income

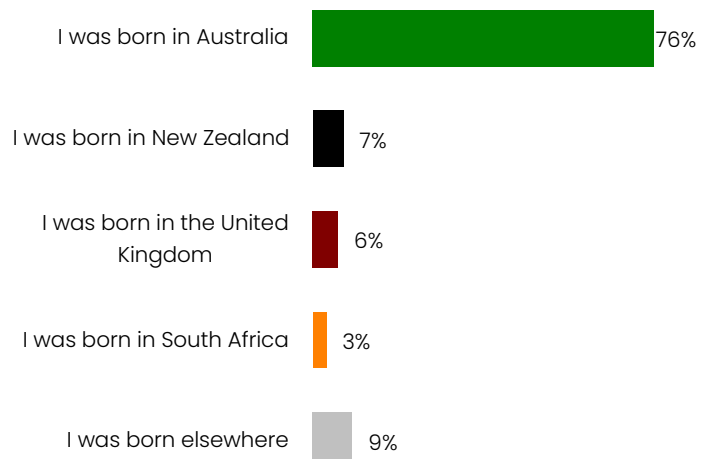
\$149,224 p.a.



## Children at Home



## Country of Birth



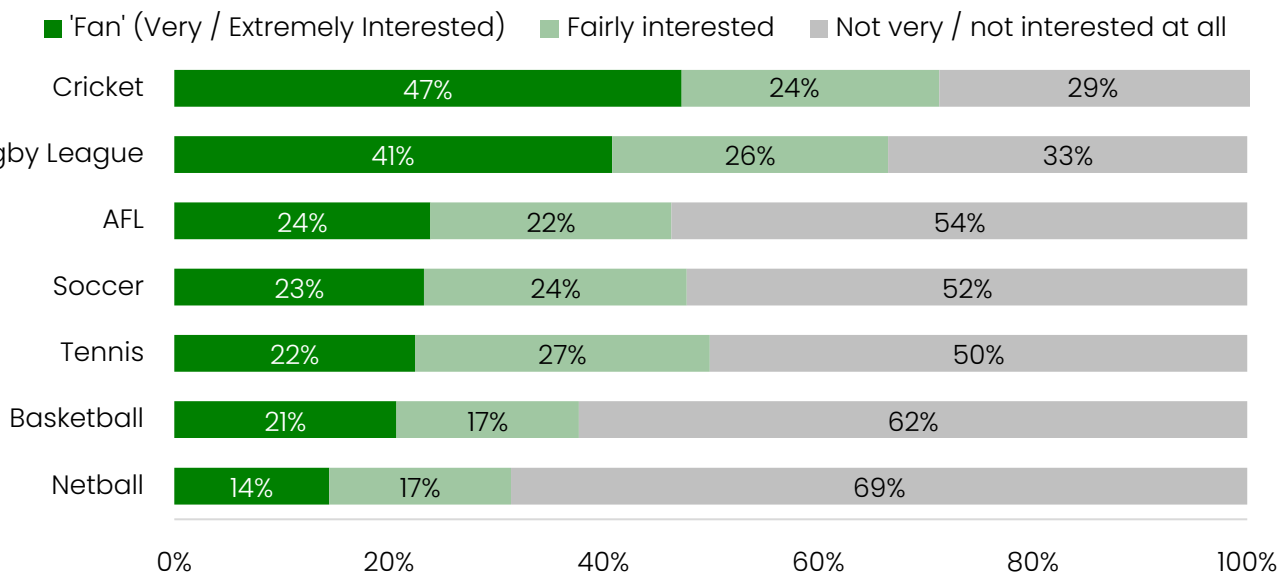
A photograph of a rugby union scrum in progress. Several players are visible, some in orange and black kit, others in green and black. They are all covered in mud, indicating a wet or muddy field. The central player is being held from behind by another player. The background shows other players and spectators, slightly out of focus.

What do Rugby Union fans  
watch and who do they  
support?

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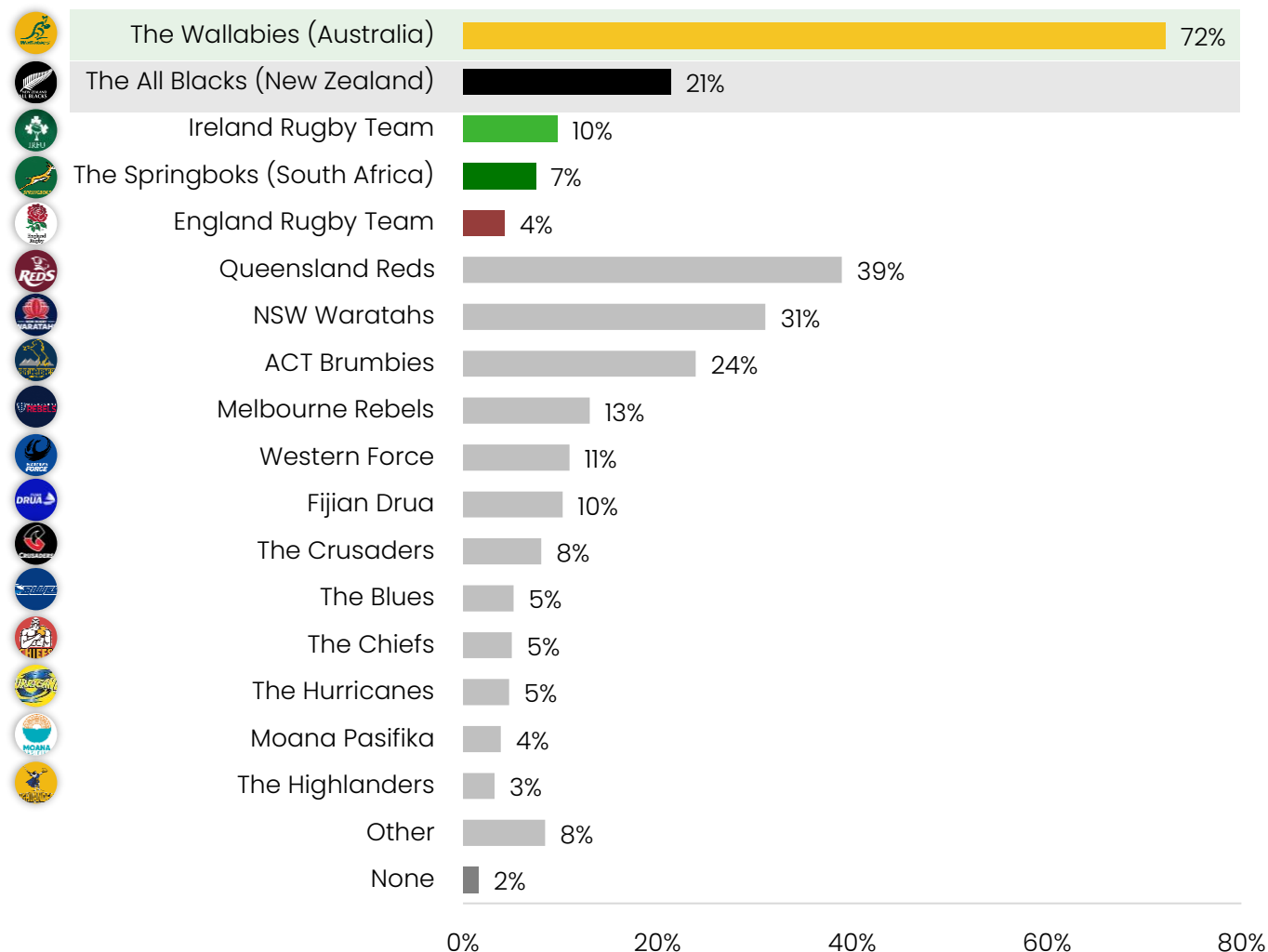
## Many Rugby Union fans take an interest in other sports, and almost half are active fans of Cricket and Rugby League

Q. How would you describe your level of interest in the following sports?



## More than one quarter of Union fans in Australia are supporters of other national teams, one in five support the All Blacks

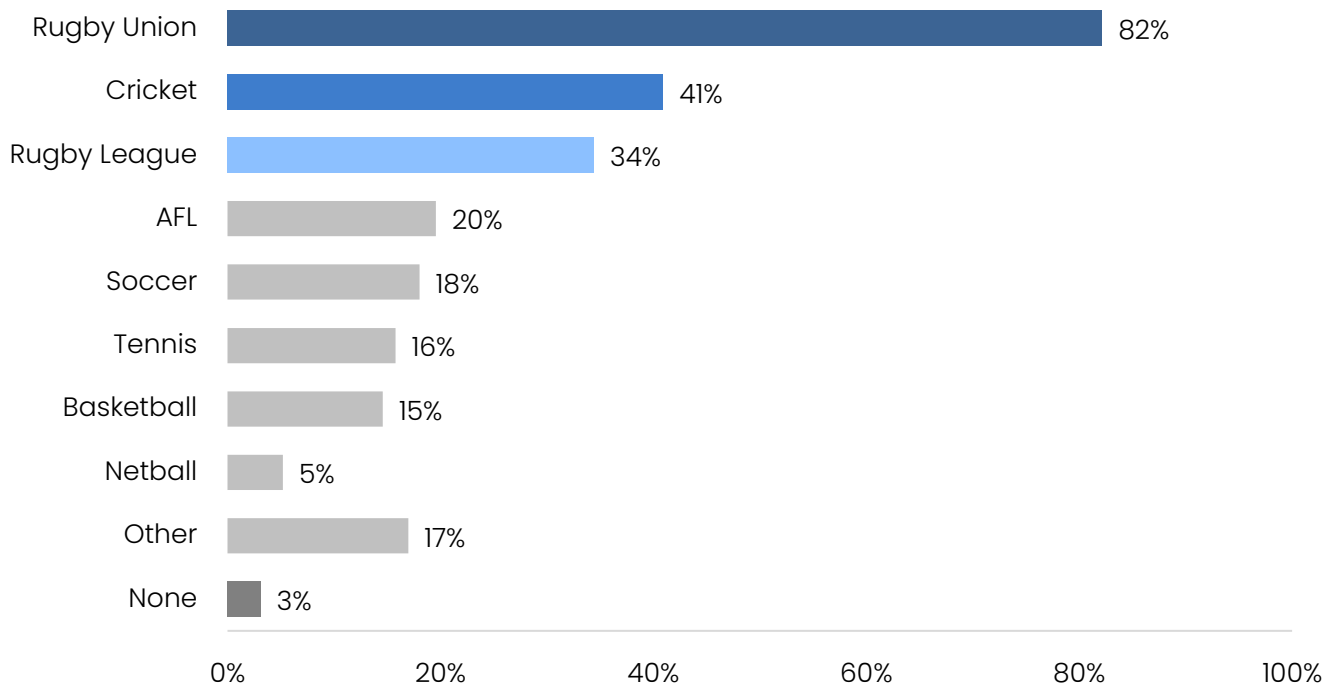
Q. Earlier, you said were a fan of RUGBY UNION. Which of the following Rugby Union teams, if any, would you describe yourself as a fan of? Select all that apply





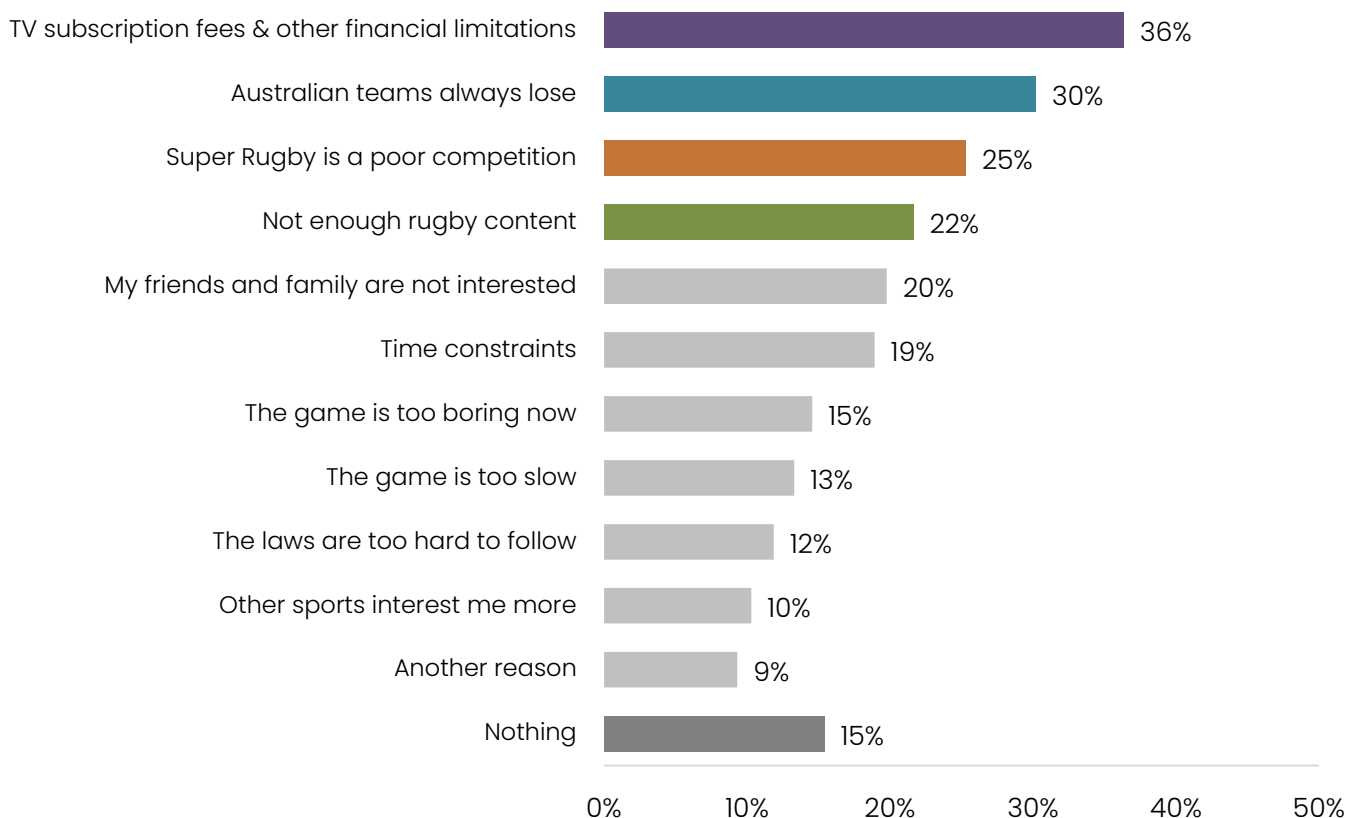
## 4 in five Union fans say they watch the sport regularly, while 4 in ten also watch Cricket, and one third also watch Rugby League

Q. For each of the following, select those for which you regularly watch live sports on TV and/or post-match highlights



## Finances, poor team performances, a poor Super Rugby format, and lack of content are the main reasons for not watching more

Q. Which of the following reasons (if any), which prevents you from watching more Australian rugby union? Select all that apply



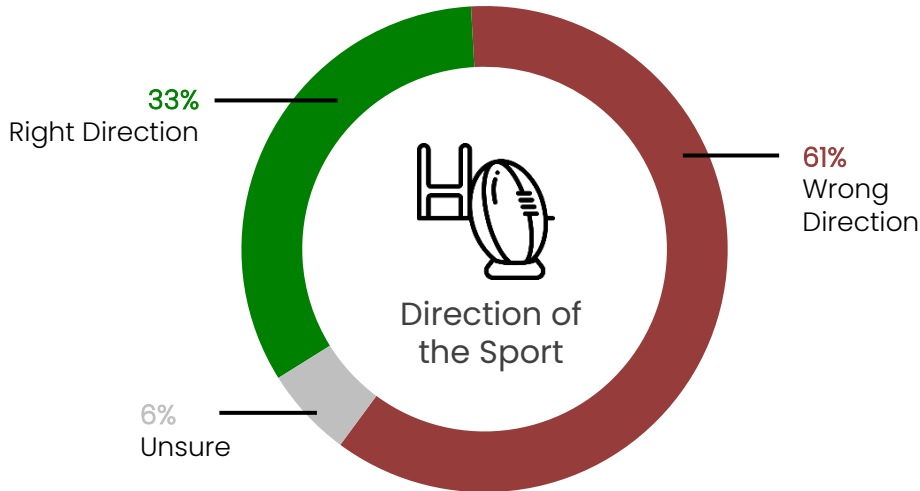


# The State of Rugby Union in Australia.

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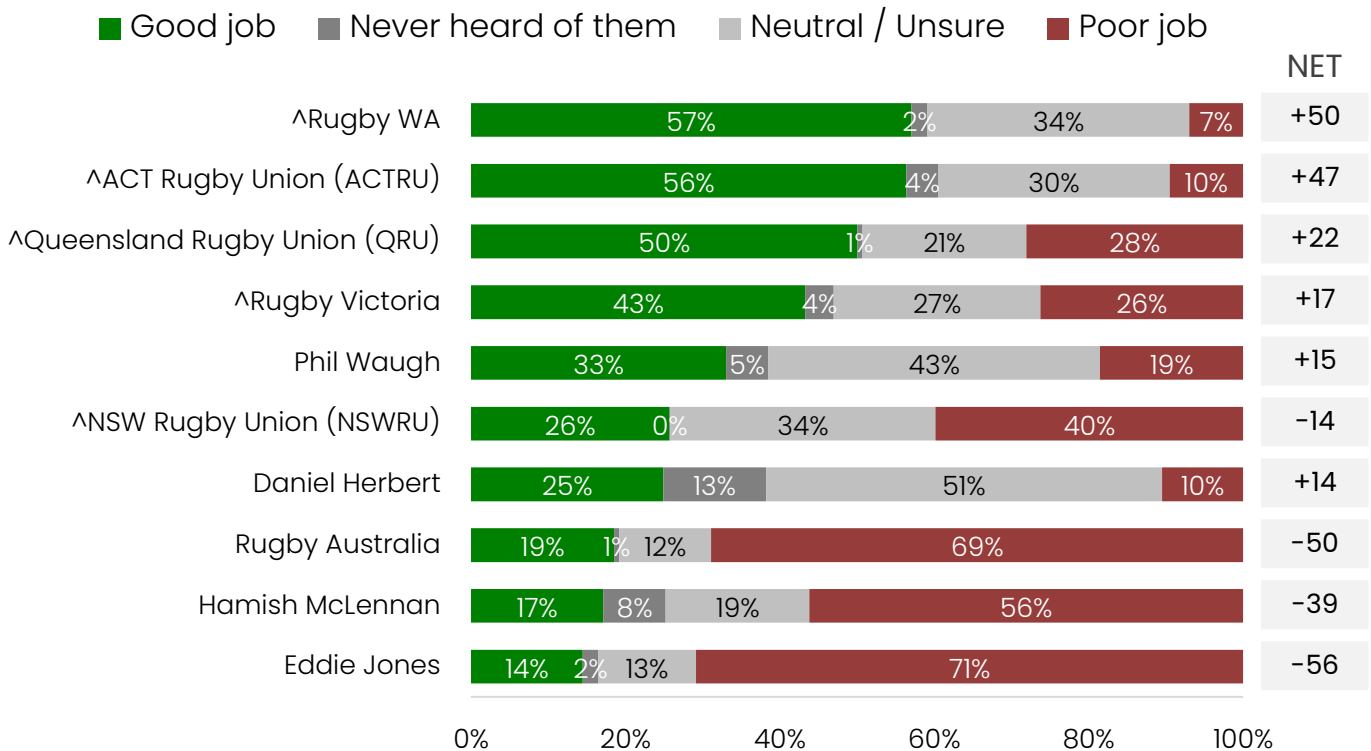
# About 6 in ten Rugby Union fans think the sport is heading in the wrong direction right now

Q. In your view, is Rugby Union in Australia heading in the Right Direction, or the Wrong Direction?



## Rugby WA, ACTRU, QRU and Rugby Victoria are most likely to be seen as doing a good job. A clear majority of fans say Rugby Australia, McLennan, and Jones have done a bad job recently

Q. Have you heard of the following figures or organisations in Australian Rugby Union, and if so, how would you rate their performance? Would you say they have done a good job, or a bad job recently?



Note: ^State-based organisations only shown to respondents in relevant areas

## Concerns from fans tend to centre around lacklustre grassroots and professional development pathways, an unengaging format, and no clear plan to grow the game

Q. What is your biggest concern about Rugby Union in Australia at this time?

*'Reduced interest in games... poor Super Rugby and international performances.'*

– Aged 45-54, fan of the Wallabies and the Melbourne Rebels.

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*'A lack of focus on grassroots development, [and] poor pathways to the professional game....'*

– Aged 35-44, fan of the Wallabies and the Queensland Reds.

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*'Continuing with a professional system that does not generate public interest or develop players.'*

– Aged 16-24, fan of the Wallabies and the Queensland Reds.

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*'The game has become so boring compared to the NRL'*

– Aged 35-44, fan of the ACT Brumbies

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*'A lack of strategic direction to consolidate the base and grow the sport.'*

– Aged 35-44, fan of the Wallabies and the NSW Waratahs.

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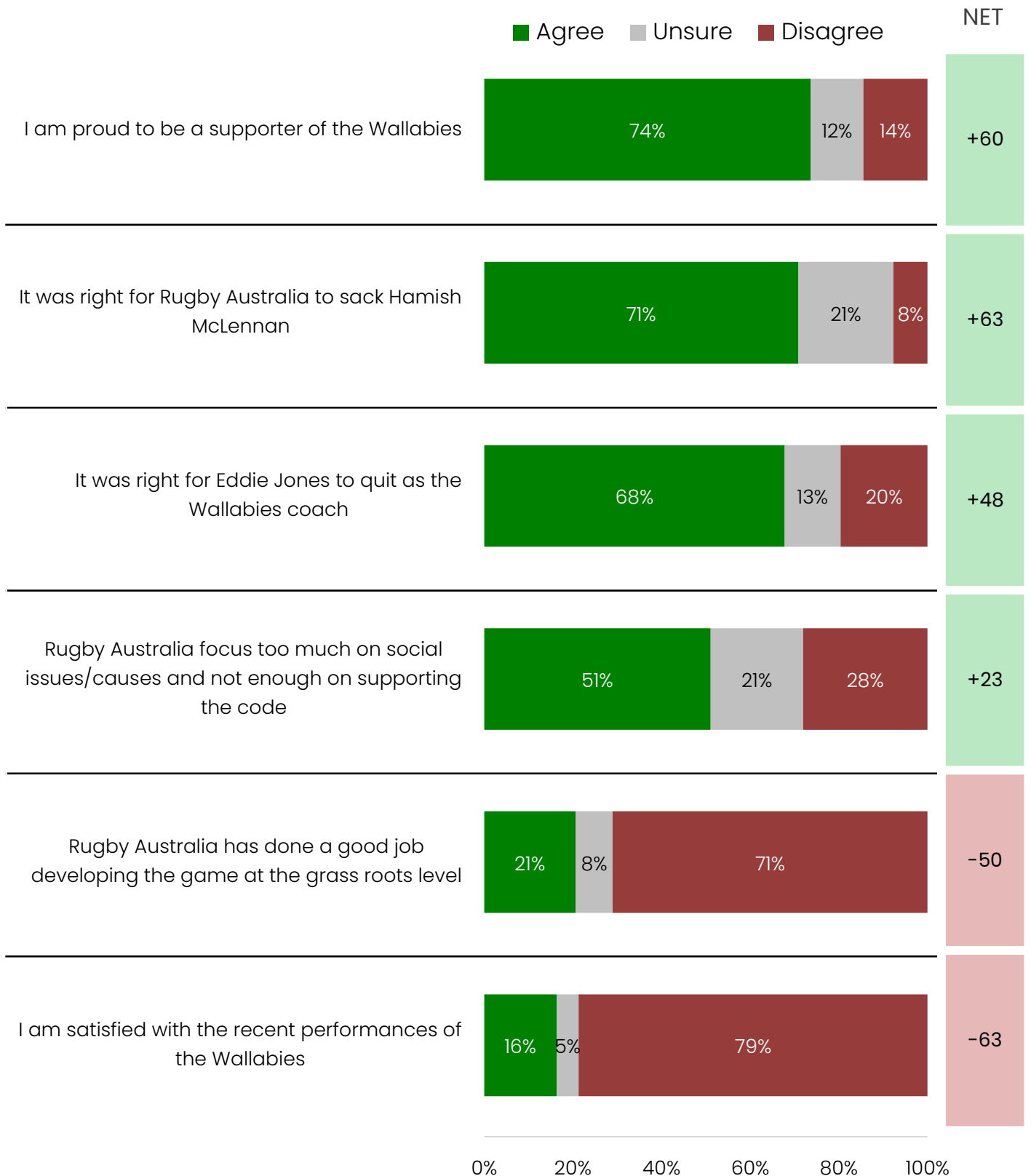


# Rugby Union Fans: Feedback on key issues in the sport.

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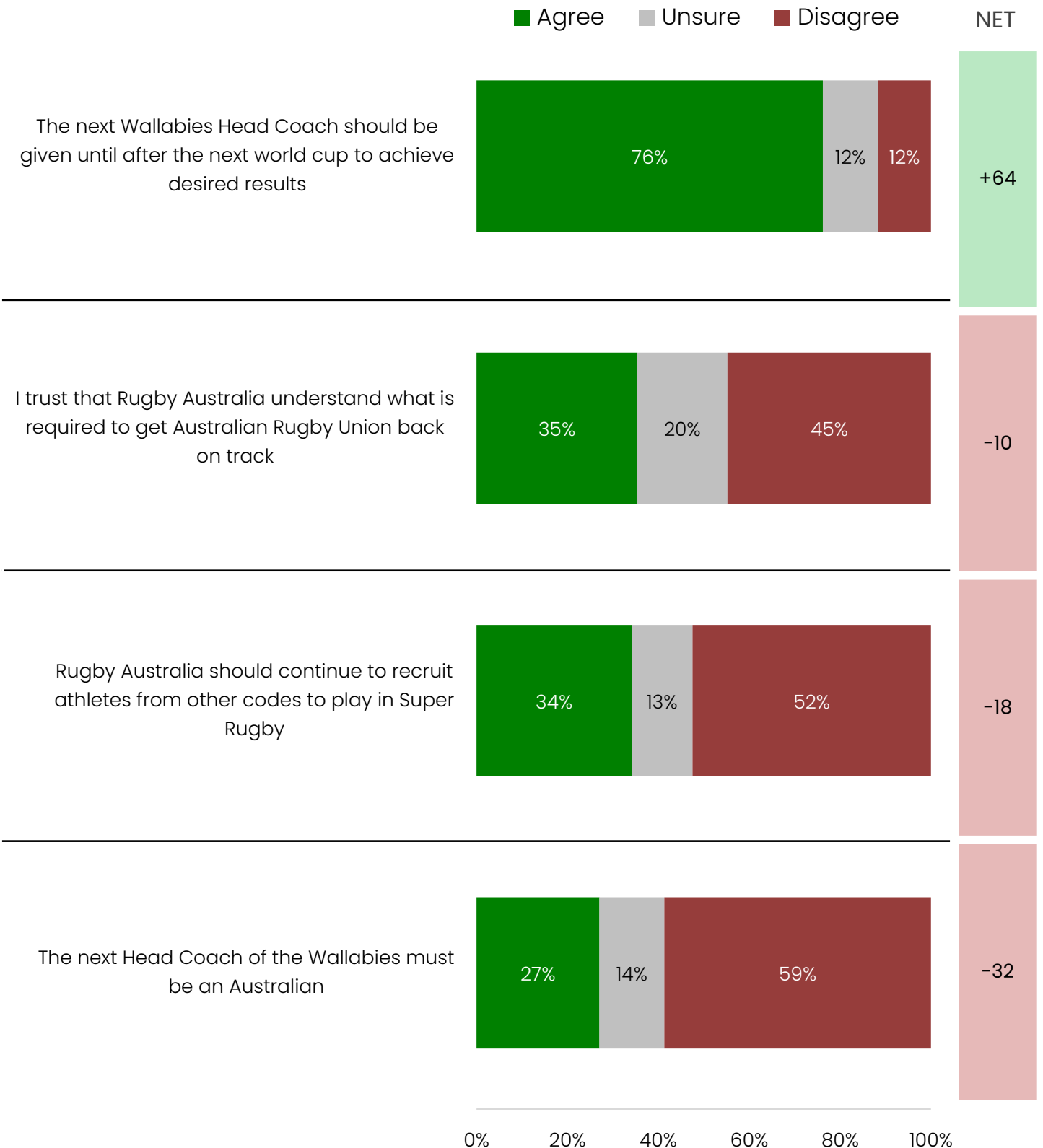
# Rugby Union fans strongly support the exits of McLennan and Jones, and are highly dissatisfied with RA’s grassroots development record, and recent performance of the Wallabies

Q. Do you agree, or disagree, with the following statements?

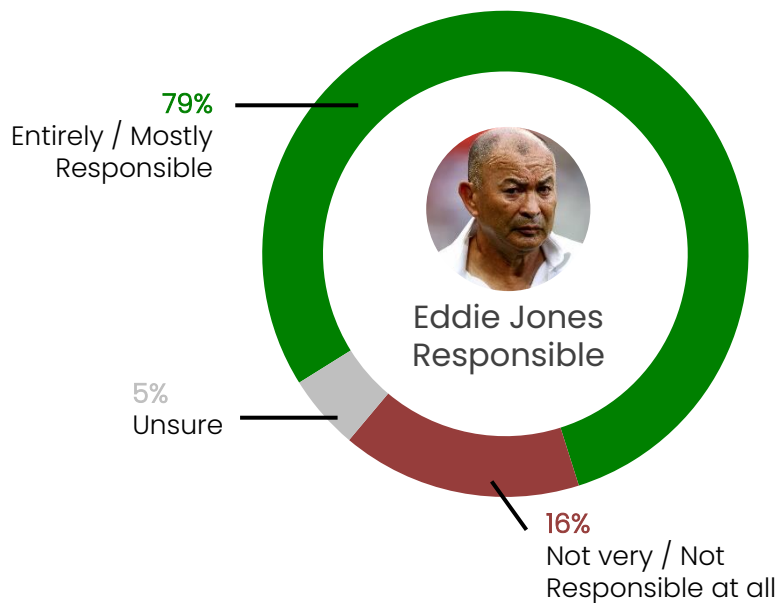
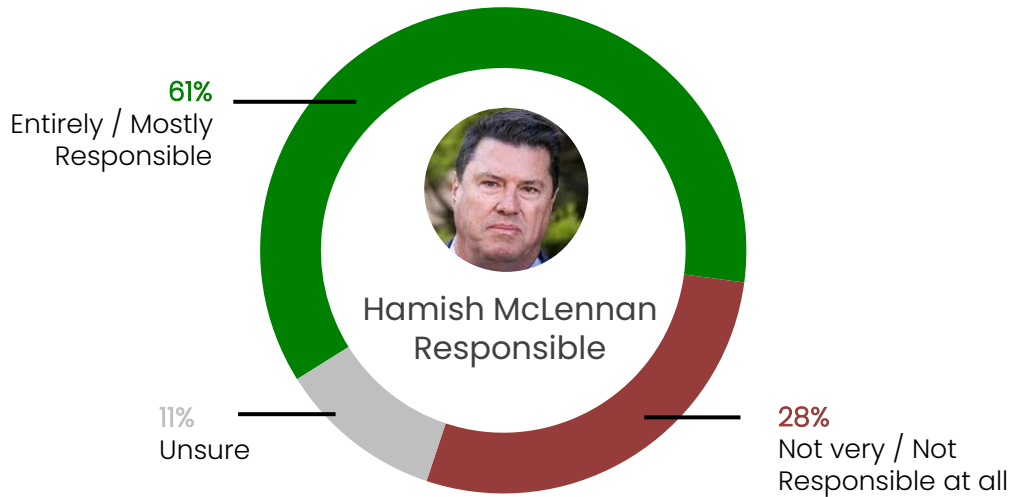


# Most fans agree that the next Wallabies coach should be given until after the next world cup to achieve results, and that they needn't be Australian. However, many do not trust that Rugby Australia knows how to get the game back on track

Q. Do you agree, or disagree, with the following statements?



## A clear majority of Rugby Union fans hold Hamish McLennan and Eddie Jones responsible for recent World Cup performance of the Wallabies



Q. To what extent, if at all, do you consider Hamish McLennan responsible for the Wallabies' 2023 Rugby World Cup performance?

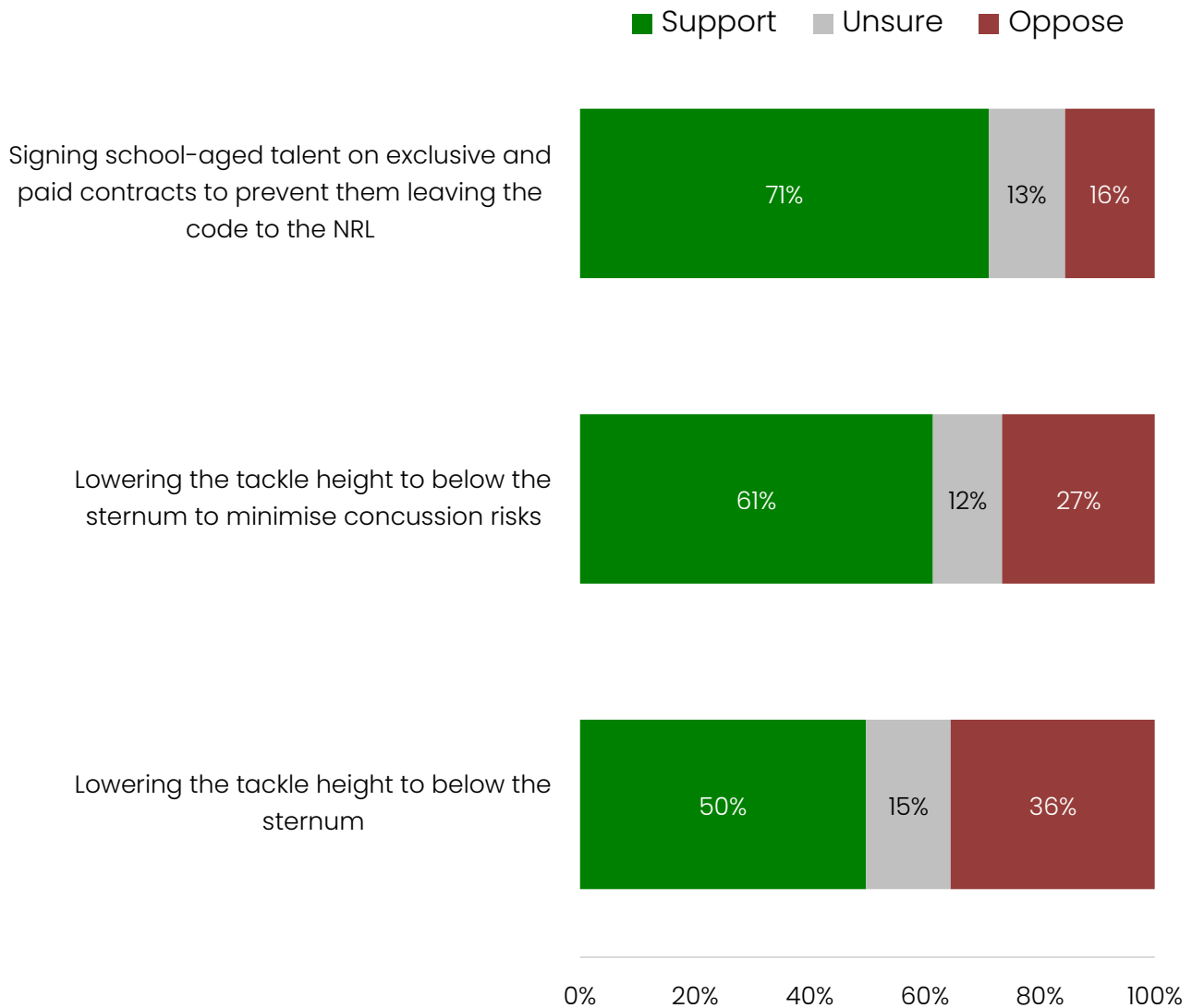
&

Q. To what extent, if at all, do you consider Eddie Jones responsible for the Wallabies' 2023 Rugby World Cup performance?



## Rugby Union fans strongly support paid contracts to prevent school-aged talent leaving the code for the NRL

Q. Do you support or oppose the following initiatives for grassroots rugby union in Australia?



There is strong support among rugby union fans (71%) to retain top-level talent by signing school aged players on exclusive and paid contracts to counter the appeal of switching codes to the NRL.

Furthermore, on the issue of tackle height, while a majority of fans support reforms to the lower it to below the sternum (50%), support increases significantly, by 11pts (to 61%), when fans are reminded of the safety benefits to players – namely: minimized concussion risks.

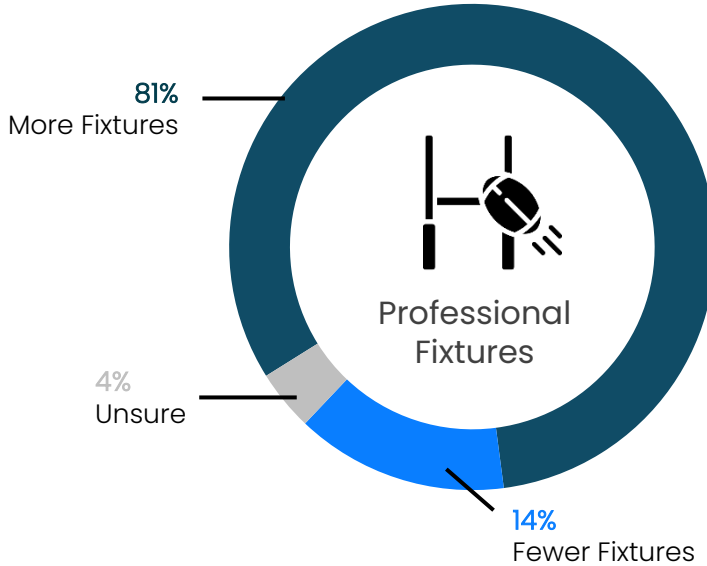


Fan Priorities for the sport.

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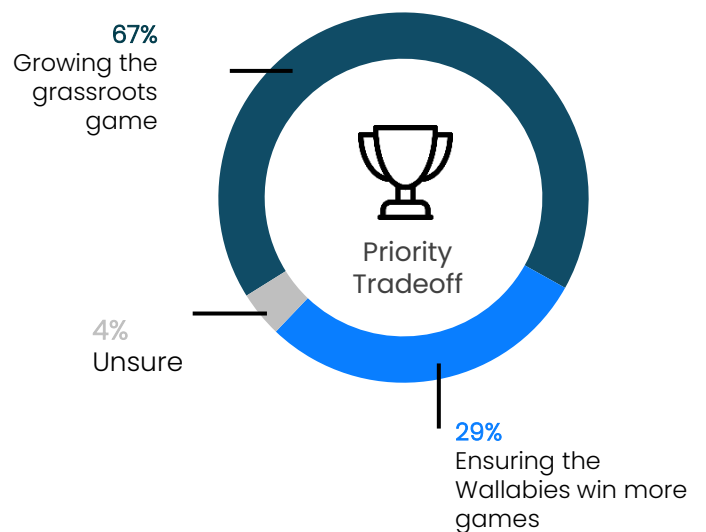
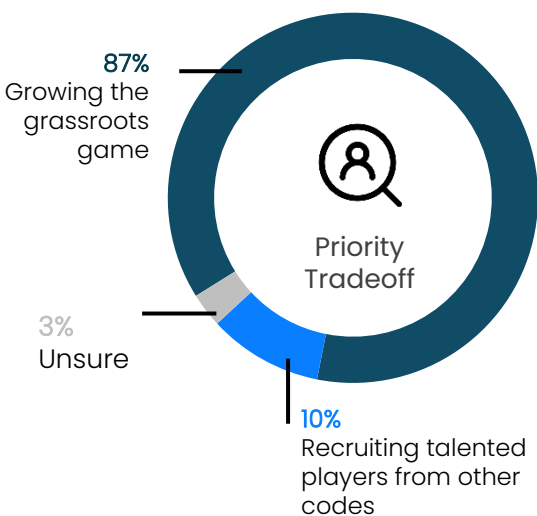
# The overwhelming majority of Rugby Union fans want more professional fixtures added to the fixtures calendar

Q. Should there be more, or fewer, professional fixtures, such as Super Rugby, in Australia?



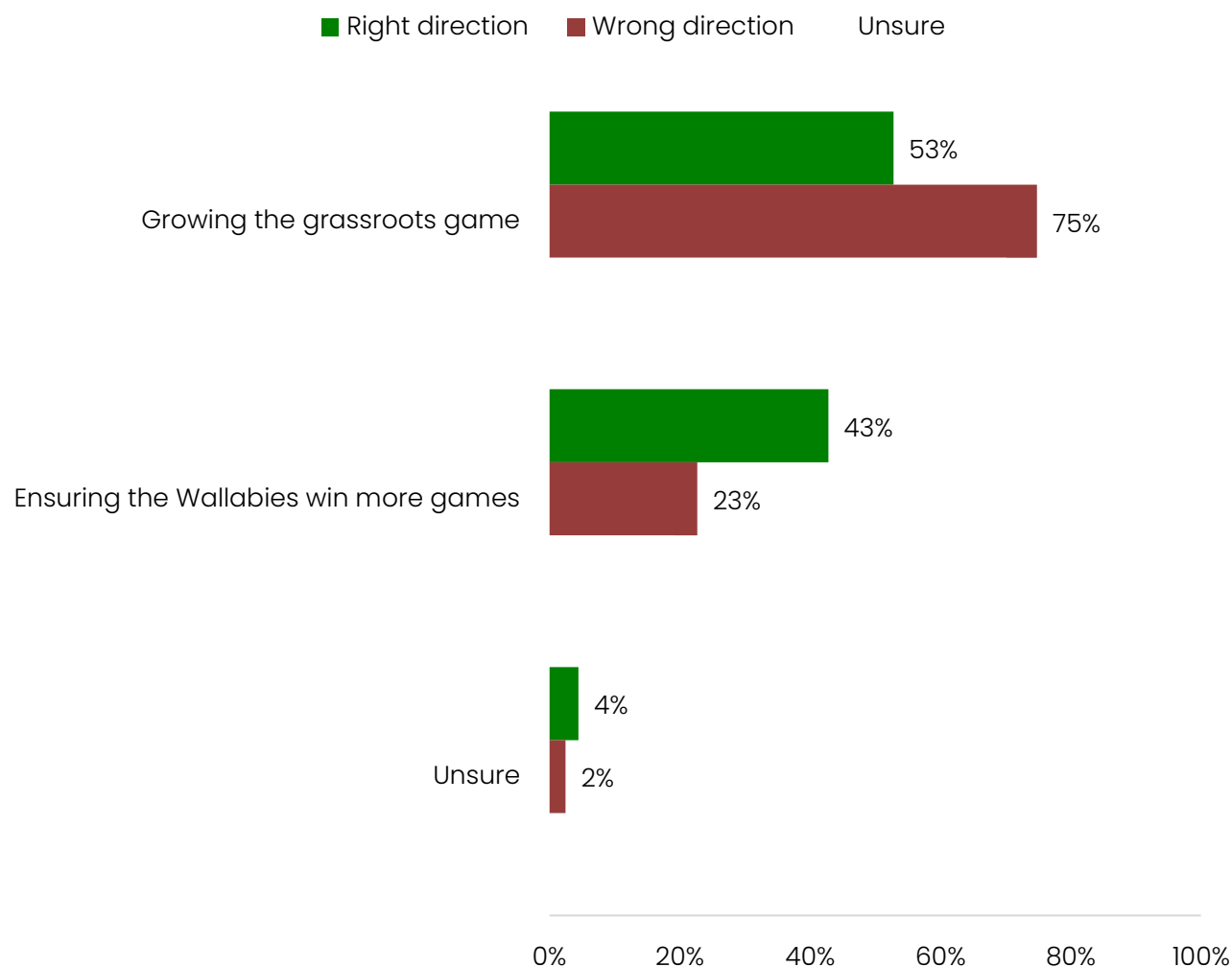
# If forced to choose, a clear majority would rather Rugby Australia prioritise growing the grassroots game over recruiting talent from other codes, or even the Wallabies winning more games

Q. If you had to choose, what should Rugby Australia prioritise most?



## Fans who feel Union is heading in the wrong are significantly more likely to say RA should prioritise the grassroots game over Wallabies winning more games

Q. If you had to choose, what should Rugby Australia prioritise most?



Those who say that Rugby Union is heading in the wrong direction (approx. 61% of fans) significantly more likely to support growing the grassroots game (75%), over ensuring the Wallabies win more games.

In contrast, fans who think the game is heading in the right direction (approx. 33% of fans) are more likely to say that Rugby Australia should prioritise ensuring that the Wallabies win more games (43%).

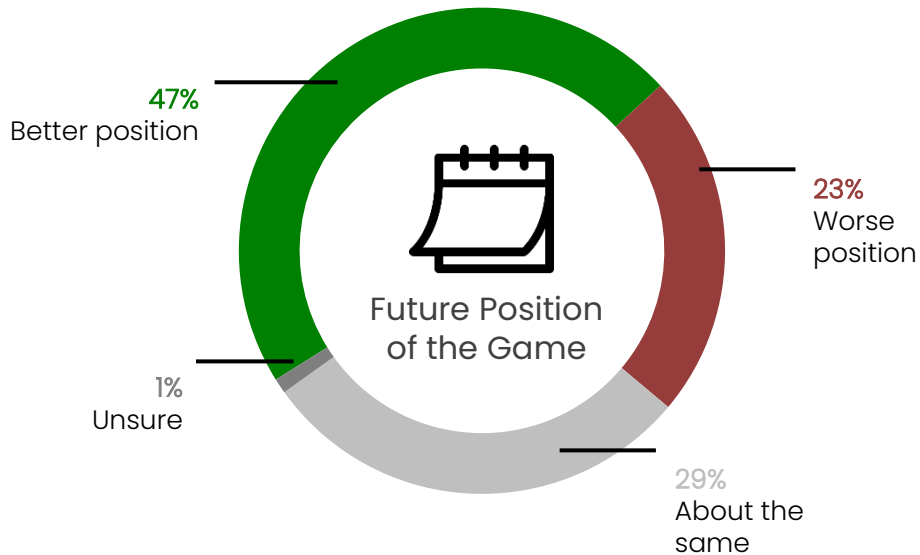


The Future of Rugby Union in  
Australia.

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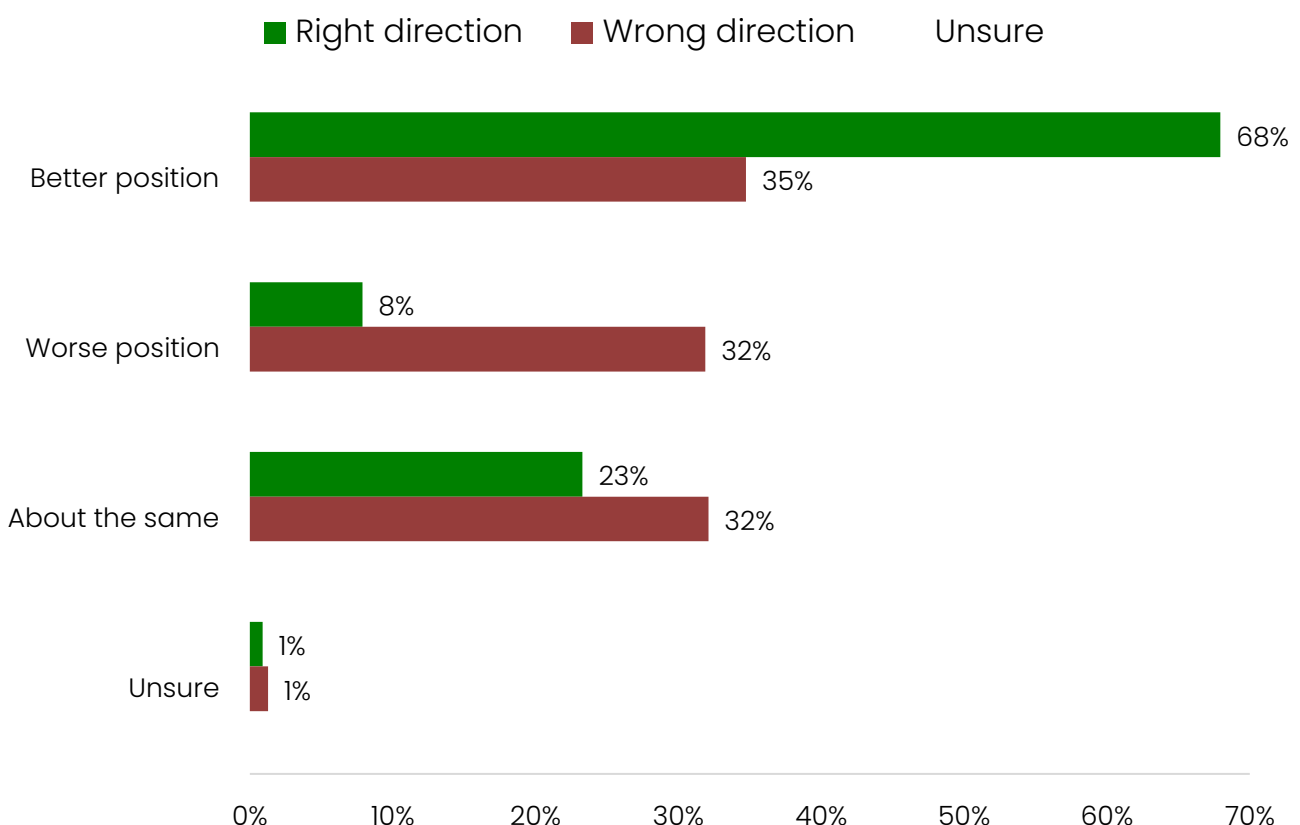
## Almost half of fans believe the game will be in a better position in 12 months time

Q. In your view will Rugby Union in Australia be in a better position, worse position, or about the same position in 12 months' time?



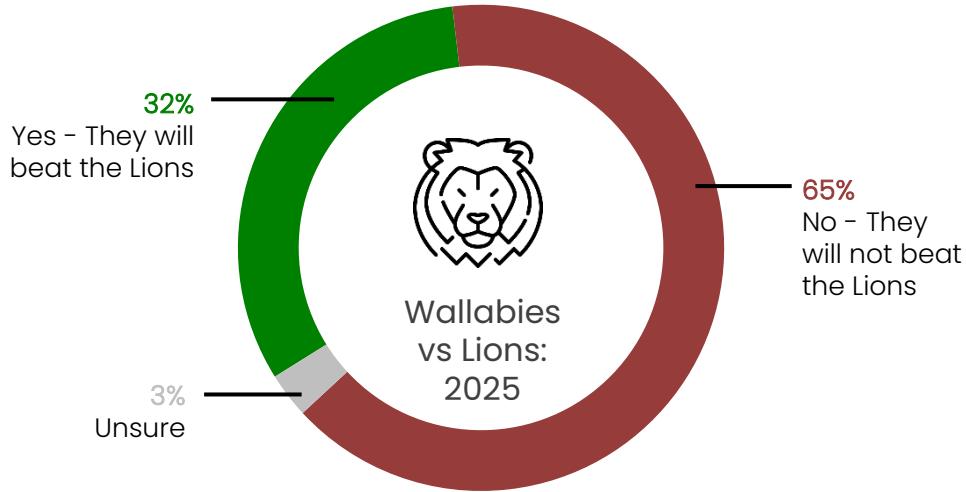
## Two-thirds of those who say Union is heading in the wrong direction believe the sport will be in the same (32%), or a worse position (32%) in 12 months time

Q. In your view will Rugby Union in Australia be in a better position, worse position, or about the same position in 12 months' time?



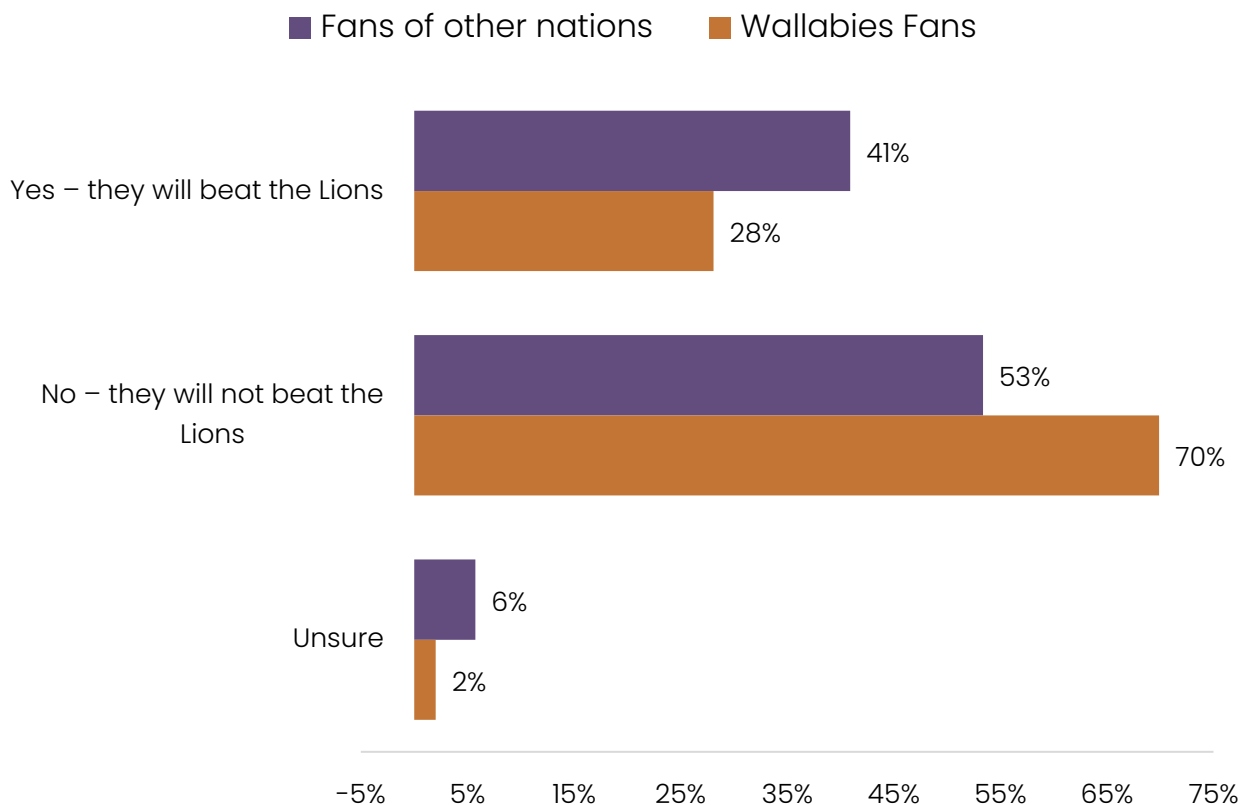
## Two-thirds of Union fans believe the Wallabies will lose the series against the British & Irish Lions in 2025

Q. If you had to say, do you believe that the Wallabies will beat the British and Irish Lions when they tour Australia in 2025?



## Wallabies fans are even more likely to say they believe the national team will lose against the Lions in 2025

Q. If you had to say, do you believe that the Wallabies will beat the British and Irish Lions when they tour Australia in 2025?



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# Conclusion

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We hope you have found our **State of Rugby Union: 2024** report interesting.

Rugby Union fans in Australia clearly believe the sport has been heading in the wrong direction at this time. Feedback on the Wallabies, Rugby Australia, Eddie Jones, and Hamish McLennan has been poor from fans, prompting cynicism about the future, particularly on the performance of the Wallabies.

Despite this pessimism, there is some hope that Union might be turning a corner in Australia. Fans are eager for more professional fixtures and want to see more initiatives put forward by Rugby Australia to better develop grassroots talent and develop the grassroots game, even if it came the expense of the performance of the national team in the near term.

We look forward to conducting a similar report next year and will share further insights with you in due course. If you have any questions about our analysis, please do not hesitate to get in touch with the team at **Freshwater Strategy**.

## Learn more.

### **Dr Mike Turner**

Director, Head of Research  
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Contact: [insights@freshwaterstrategy.com](mailto:insights@freshwaterstrategy.com)





# FRESHWATER

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## Contact Us

Freshwater Strategy  
insights@freshwaterstrategy.com  
+61 (02) 8324 7482  
@tweetfreshwater

Sydney, Australia  
Level 43/225 George St, NSW 2000

