

**A STUDY OF THE ROLE OF TAXATION IN THE DECISION OF SOUTH
AFRICAN RUGBY PLAYERS TO PLAY OVERSEAS**

BY

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“In planning for battle I have always found that plans are useless, but planning is indispensable” – Dwight D. Eisenhower

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Trust in the Lord with all thine heart and lean not unto thine own understanding; in all thy ways acknowledge him and he shall direct thy paths – Proverbs 3:5-6 (KJV)

SUMMARY

A STUDY OF THE ROLE OF TAXATION IN THE DECISION OF SOUTH AFRICAN RUGBY PLAYERS TO PLAY OVERSEAS

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The loss of sporting talent has severely affected South African rugby over the past decade, with a total of 3 319 players leaving South Africa to play overseas since 2000, 32% of those on an indefinite basis, and 94% of moves being to the northern hemisphere. These figures justify the concerns of the International Rugby Board that the problem is most pronounced as it relates to migration from the southern to the northern hemisphere.

This study set out firstly to determine the factors influencing the decision of players at the top five South African rugby unions to play overseas and secondly, to establish the relative importance of taxation and other factors in the migration decision.

A literature review was conducted in order to establish the theory base for the study, as well as to generate a list of factors which may possibly affect the decision to play overseas. Relevant income tax regulations were also considered.

A survey, utilising a self-administered questionnaire, of 88 rugby players at the top five South African rugby unions was conducted to determine the factors influencing the migration decision, as well as to rate the relative importance of the factors, specifically taxation, in the decision-making process.

The findings of the study built on prior research in the field of sport labour migration, and corroborated previous findings regarding the factors influencing the migration decision. The study noted financial reasons as the main factor in the decision to migrate. In a South African context, the study found that taxation does indeed play a role in the migration decision.

It is recommended that unions apply a multifaceted approach in order to retain players, focusing on increased financial benefits, game time and other opportunities, as well as improving the relationship between the unions and the players.

Given the concern about migration in rugby at international level, it is argued that awareness of the factors influencing the migration decision may better equip South African rugby unions to manage the problem of losing top players to foreign clubs, which could lead to local unions being more competitive locally and in the Super 14 competition.

Keywords:

Sport labour migration

Rugby players

Taxation

OPSOMMING

’n STUDIE OOR DIE ROL VAN BELASTING IN DIE BESLUIT VAN SUID-AFRIKAANSE RUGBYSPELERS OM OORSEE TE SPEEL

deur

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Die verlies van sporttalent het Suid-Afrikaanse rugby die afgelope dekade ernstig beïnvloed, met ’n totaal van 3 319 spelers wat Suid-Afrika sedert 2000 verlaat het om oorsee te gaan speel, waarvan 32% op ’n onbepaalde basis was, met 94% van skuiwe na die noordelike halfgrond. Hierdie syfers bevestig die stelling van die Internasionale Rugby Raad dat die probleem mees kenmerkend is rakende migrasie van die suidelike na die noordelike halfgrond.

Die studie se doel was eerstens om die faktore te bepaal, wat die besluit van spelers by die top vyf Suid-Afrikaanse rugbyunies om oorsee te gaan speel beïnvloed, en tweedens, om die relatiewe belangrikheid van belasting en ander faktore in die besluit te bepaal.

’n Literatuurstudie is onderneem ten einde die teoretiese grondslag vir die studie vas te stel, en ook om ’n lys van faktore, wat moontlik die besluit om oorsee te gaan speel kan beïnvloed, te ontwikkel. Toepaslike belastingregulasies is ook oorweeg.

’n Opname, deur middel van ’n selftoegepaste vraelys, van 88 rugbyspelers by die top vyf Suid-Afrikaanse rugbyunies is uitgevoer ten einde die faktore wat die migrasiebesluit beïnvloed te bepaal, asook om die relatiewe belangrikheid van die faktore, spesifiek belasting, in die besluitnemingsproses te bereken.

Die studie se bevindinge bou op vorige navorsing in die area van sport arbeidsmigrasie, en het die bevindinge van vorige studies beaam. Die studie het bevind dat finansiële redes die belangrikste faktor is in die besluit om te migreer. In 'n Suid-Afrikaanse verband is bevind dat belasting wel 'n rol in die migrasiebesluit speel.

Daar word voorgestel dat unies 'n veelsydige benadering volg ten einde spelers te behou, met verwysing na verhoogde finansiële voordele, speelyd and ander geleenthede, asook die verbetering van die verhouding tussen die unies en spelers.

Gegewe die besorgdheid oor migrasie in rugby op internasionale vlak, word daar betoog dat bewustheid van die faktore wat die migrasiebesluit beïnvloed Suid-Afrikaanse rugbyunies beter sal toerus om die probleem van die verlies van topspelers na oorsese klubs te bestuur, met die gevolg dat plaaslike unies meer mededingend kan wees, beide plaaslik en in die Super 14 kompetisie.

Sleutelwoorde:

Sport arbeidsmigrasie

Rugbyspelers

Belasting

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CHAPTER 1: INTRODUCTION TO THE STUDY

1.1 BACKGROUND INFORMATION

“We are again the number one rugby playing nation, we have the best rugby player [Bryan Habana], the best coach [Jake White], the best captain [John Smit] and the best of everything that is rugby”. This is according to a Management Today Yearbook article reflecting on South Africa’s success in the 2007 Rugby World Cup™ (2008:22).

The role which rugby, and particularly the Springboks, has played in nation building in South Africa, cannot be denied. Who can forget the scenes at Johannesburg International Airport and along the parade routes in a number of South African cities when crowds of thousands, representing all races, turned up to welcome a triumphant Springbok team home after their success in the 2007 Rugby World Cup™ in France? Or who does not remember the iconic images of Nelson Mandela, wearing the number 6 jersey, holding aloft the William Webb Ellis trophy which South Africa had won in 1995?

A Sunday newspaper recently contended that the fact that top South African players are going overseas to play in foreign leagues is a problem for rugby in South Africa. The authors proposed that allowing players to profit from endorsements could lead to players being able to earn a similar income playing in South Africa as they would do playing overseas (Harmse & Borchardt, 2009:1).

A considerable number of prominent South African rugby players have left South Africa to play in the United Kingdom (UK) and France, for example De Wet Barry, Gary Botha, Daan Human, Butch James, Victor Matfield, John Smit, Cobus Visagie and Ashwin Willemse, to name but a few (Cronjé, 2007; Mail & Guardian online, 2007; Nell, 2007). At the time this study commenced, it was rumoured that Bryan Habana and Francois Steyn may be considering overseas contracts (Anon., 2009; Harmse & Borchardt, 2009:1).

It has been reported that approximately 100 South African rugby players were playing for European clubs in 2007 (Mail & Guardian online, 2007). This claim is supported by data obtained from SA Rugby, indicating that a total of 3 319 players have left South Africa to

play overseas since 2000, 32% of those on an indefinite basis, and 94% of moves being to the northern hemisphere (SA Rugby, 2009). The International Rugby Board (IRB) and the International Rugby Players Association (IRPA) has expressed concern about the problem, which is deemed to be most pronounced as it relates to migration from the southern to the northern hemisphere (Van Reenen, 2009). According to Piet Heymans (cited in Nell, 2007), the Chief Executive Officer of the South African Rugby Players Association (SARPA), the main reason is the large amounts of money that rugby players can earn in England and France.

The significant number of players competing overseas is cause for concern partly due to the fact that the South African Rugby Union had decided, prior to the 2007 Rugby World Cup™, that players competing overseas would no longer be considered for the national team (Mail & Guardian online, 2007), although this decision was later withdrawn (Cronjé, 2007). Even though overseas players are once again eligible for selection to the national team, Peter de Villiers, the Springbok coach, was rumoured to be reluctant to select players not participating in the Super 14 competition (Rich, 2008). In addition, the loss of players to overseas clubs could result in a decline in the competitiveness of both local teams and the national team, a disadvantage of sport labour migration which is noted in the academic literature (Cornelissen & Solberg, 2007:295; Maguire, 1994:458; Maguire & Pearton, 2000a:178; Maguire & Pearton, 2000b:762; McGovern, 2000:409-410).

The problem is not unique to South Africa. The Times in England recently reported that England stalwart Jonny Wilkinson is considering a move to a French club, this after James Haskell, Riki Flutey and Tom Palmer also recently announced that they would be moving to French clubs (SkySports, 2009; Souster, 2009).

The problem is also not limited to rugby. In an article in Accountancy Age, it is argued that “the [United Kingdom] is losing out on a string of talented foreign footballers and millions of pound (sic) in tax revenue as a result of unfavourable tax rules”. A source was quoted as saying that foreign footballers are deterred by the United Kingdom’s tax rules (Hawkes, 2006).

Following from this, an article for the Tax Foundation stated, “When trying to lure soccer (football) talent in Europe, a team must bid against teams from across the entire world.

And since income tax rates for players will differ across countries, this can put teams from one country at a significant advantage or disadvantage when competing over talent with teams from other countries". The author notes that taxes play an important role in a player's decision about which club to play for, as a player would be concerned primarily with his after-tax income (Prante, 2006).

In contrast to Hawkes, Carcabal (2007) claims that French football stars are drawn to the UK as a result of the favourable tax status that UK clubs offer, primarily through the use of 'offshore' contracts, which utilise offshore trusts to account for a large part of a player's income. He also notes that approximately 90% of expatriate French players play overseas.

This view is supported by an article in the (British) Sunday Times which quoted a memorandum from a Revenue official as saying, "Quite a lot of the ND [non-domicile] and NOR [not ordinarily resident] cases dealt with ... were either professional footballers or professional football coaches/managers. Top football players and managers earn large amounts of money and so may well have relatively complex tax affairs" (Winnett & Elliot, 2007).

The French problem of football players preferring to play overseas is not dissimilar to that experienced by South Africa, where a large number of top rugby players play in overseas leagues, most notably in the UK, France and Italy (SA Rugby, 2009).

The issue of labour migration affects a myriad of sporting disciplines, including American football, athletics, baseball, basketball, cricket, ice hockey, rugby and soccer (or football) (Elliot & Maguire, 2008:483-484; Maguire & Pearton, 2000a:176; Maguire & Pearton, 2000b:761). Sport labour migration has been studied quite extensively, with studies into the majority of these areas, although football has arguably been the area which has been investigated most comprehensively, taking account of the collected academic work over the past two decades.

Although sport labour migration has been studied extensively, very few studies relating to rugby specifically have been noted. Additionally, only one study has been carried out in a South African context (see Cornelissen & Solberg, 2007), although that study focused on

the inward migration of African football players to South Africa as compared to Europe. There is thus considered to be a need, in a local context, to determine the reasons for South African rugby players moving overseas.

Admittedly, although one of the main reasons for South African players deciding to play overseas is likely to be the financial benefit, the possibility exists that taxation may also play a role, as evidenced by the earlier discussion. For this reason, it is considered worthwhile investigating the relative importance of taxation in the decision of top rugby players to play in overseas leagues.

1.2 RESEARCH QUESTION

What is the role of taxation in relation to other factors in the decision of South African rugby players to play in overseas leagues instead of locally?

1.3 RESEARCH OBJECTIVES

This study aims to address the following research objectives:

- To determine the factors which influence the decision of rugby players from the top five South African rugby unions to play in an overseas league; and
- To evaluate the relative importance of the different factors and, specifically, to establish the importance of taxation as a factor in the migration decision.

1.4 SIGNIFICANCE OF THE STUDY

An awareness of the factors leading to the decision by top players to compete in overseas leagues may better equip the top five rugby unions in South Africa to manage the problem of losing top players to foreign clubs, which could result in the local unions being more competitive in, for instance, the local Currie Cup competition and the Super 14 contest.

As noted earlier, only one other study in the field of sport labour migration has been conducted in South Africa, that is, the study by Cornelissen and Solberg (2007), which focused on the inward migration of African football players to South Africa as compared to

Europe. This study is therefore the second study in the field in South Africa, and the first dealing with rugby and the influence of taxation on the decision to play overseas.

1.5 DEFINITION OF KEY TERMS AND ABBREVIATIONS

A number of key terms are relevant to this study. The definitions of these terms, as applied for the purposes of this study, are set out below.

Brawn drain: The term refers to the loss of sporting talent from less developed countries to more economically powerful nations (McGovern, 2000:401).

Income tax: Tax levied in terms of the Income Tax Act, 58 of 1962, on taxable income (being gross income less exempt income and allowable deductions, plus any taxable capital gain).

Rugby players: When used in relation to the population of this study, the term refers to the players in the senior teams of the respective rugby unions.

Springboks: The senior national rugby team of South Africa.

Tax: Any levy or tax due under the provisions of the Income Tax Act, 58 of 1962.

The Act: The South African Income Tax Act, 58 of 1962.

Top five rugby unions: The five historically most successful South African rugby unions competing in the Currie Cup, which are also allied to the Super 14 franchise, these being:

- The Blue Bulls, based in Pretoria in the Gauteng province,
- The Free State Cheetahs, based in Bloemfontein in the Free State province,
- The Golden Lions, based in Johannesburg in the Gauteng province,
- The Natal Sharks, based in Durban in the Kwazulu-Natal province, and
- Western Province (known as the Stormers in the Super 14 competition), based in Cape Town in the Western Cape province.

United Kingdom: Includes Great Britain (being England, Scotland and Wales) and Northern Ireland, but for the sake of simplicity, references in this study to the United Kingdom also include the Republic of Ireland (the totality of which is more correctly referred to as the British Isles).

The list below details certain abbreviations which have been used throughout this study:

DTA:	Double taxation agreement
IRB:	International Rugby Board
IRPA:	International Rugby Players Association
SARPA:	South African Rugby Players Association
SARU:	South African Rugby Union, which is incorporated as SA Rugby (Pty) Ltd
UK:	United Kingdom

1.6 RESEARCH DESIGN AND METHODOLOGY

The aim of the research was to determine the factors influencing the decision of rugby players at the top five South African rugby unions to play for overseas clubs, and to establish the relative importance of the different factors, specifically taxation, influencing the decision.

A literature review was conducted, in order to establish the theory base for the study, as well as to generate a list of factors which may potentially influence the decision to play overseas.

A survey, utilising a questionnaire, of rugby players at the top five South African rugby unions was conducted, to determine the actual factors impacting the decision, as well as to rate the relative importance of the factors, specifically taxation, in the decision-making process.

Potential questions to be included in the questionnaire were drawn up on the basis of the literature review and then refined, so as to arrive at the final questionnaire. The questionnaire was pre-tested by colleagues of the researcher, acting as surrogate

respondents, and reviewed by the supervisors of the study and a research consultant to the Faculty of Economic and Management Sciences at the University of Pretoria.

No pilot study was carried out, partly because of the unavailability of players owing to the conclusion of the Super 14 contest during May 2009 and the British and Irish Lions tour to South Africa during June 2009, and partly as a result of the fact that the questionnaire was considered to be straightforward enough to be understood by respondents. In addition, the questionnaire was translated into Afrikaans after being compiled in English, thereby ensuring that respondents would be able to complete the questionnaire in a language of their choice.

Questionnaires were sent to each of the top five South African rugby unions for distribution to players in the unions' senior teams. The questionnaires were completed during July 2009, after which they were collected from the players by the unions and returned to the researcher for analysis.

The primary research conducted constitutes exploratory research and as such, the sample was not statistically determined, but included all those players from the top five South African rugby unions willing to participate in the study. As a result, the level of confidence in the results was not determined.

A total of 90 questionnaires were returned, two of which were deemed to be invalid, as the question which directly addresses the aim of the study had not been completed. Therefore, a total of 88 valid responses were received, which resulted in a response rate of 44%, based on an estimated population of 200.

Responses were coded into numerical data, and the numerical data for the sample overall was then analysed by the Faculty's research consultant using the Statistical Analysis Software (SAS) package (version 9.1.3). The results of the statistical analysis were provided in a report format, indicating the frequencies and percentages. In order to determine the results per union, the data was analysed by the researcher using a spreadsheet.

1.7 DELINEATION AND LIMITATIONS OF THE STUDY

As this was an exploratory study, the study only considered the factors influencing the decision of players at the top five South African rugby unions to play in overseas leagues. It did not consider the factors affecting the migration decision of players at the nine remaining South African rugby unions which are not allied to the Super 14 competition, nor that of comparable rugby players in Australia or New Zealand. In addition, the study did not consider the factors shaping the decisions of other sportsmen practising their craft overseas, for example football players, golfers, athletes and the like.

Owing to the delineation in the focus of the study, the results may not be readily generalisable to other unions, countries or sporting disciplines. As the study is based on exploratory research, the level of confidence in the findings was not determined.

1.8 ASSUMPTIONS

The study assumes that rugby unions wish to retain players, or that unions do not wish players to leave South African unions in favour of playing overseas, as this may influence the competitiveness of both local rugby unions and the South African national team.

1.9 CHAPTER OVERVIEW

Chapter 1: Introduction to the study

The first chapter provides the background to the study, based on an overview of recent developments in the field, and culminates in the formulation of the research question and research objectives. It considers the significance of the study, and sets out key terms and abbreviations. The research design and methodology are discussed briefly, while the delineation and limitations of the study and assumptions are noted.

Chapter 2: Literature review

The second chapter reviews the literature relevant to the study, both in the academic literature and the printed media. The aim is to place the study in context, as well as to generate a list of factors which may possibly influence the decision of rugby players at the top five South African rugby unions to play in overseas leagues, for inclusion in the

questionnaire to be utilised in the survey. The chapter also reviews aspects of income tax relevant to the migration decision.

Chapter 3: Research design and methodology

The third chapter discusses the research design applied to this study and the methodology employed. It considers the target population of the study, and the sample size and sampling method used. The chapter covers the design of the research instrument, including the rationale behind the questions used in the survey. It reflects on the method and timing of data collection, as well as the methods used to code and analyse the primary data. The validity and limitations of data and ethical considerations are also discussed.

Chapter 4: Analysis of results

The fourth chapter centres on the analysis of the responses to the questionnaire. The responses to each of the questions posed in the survey are analysed individually. The correlation between certain demographic factors and the intention to play overseas is determined, and a comparison of responses between the different unions involved in the survey is also performed where deemed appropriate.

Chapter 5: Conclusions and implications

After consideration of the recent literature on the topic (being literature which was published since the initial literature review was performed), the final chapter reviews the responses to the survey, and provides a summary of the findings of the primary research. The contribution and limitations of the study are considered, and finally, suggestions for future research are presented.

1.10 CONCLUSION

This chapter presented the focus of the study. In addition to the background to the problem, it set out the research question and objectives. The significance of the study was considered, and key terms and abbreviations defined. The research design and methodology were highlighted, as were the delineation and limitations of the study.

The next chapter discusses the literature relevant to the study, mainly in order to generate a list of possible factors influencing players' decision to compete in overseas leagues.

CHAPTER 2: LITERATURE REVIEW

2.1 INTRODUCTION

The previous chapter covered the introduction to the study, as well as the research question and objectives, and discussed the significance and limitations of the study. This chapter aims to place the study in context.

Sayers and Edwards (2004:243) observe that “sports are a serious business” and note the importance of sport to a nation’s identity (Sayers & Edwards, 2004:246), although professional sports stars may be conflicted between advancing their own careers and their feelings of nationalism (Sayers & Edwards, 2004:245). They remark that ‘ordinary’ people are fascinated by sports stars, mainly because of their sporting ability, although professional sports workers are motivated by the same emotional and physical demands as other types of workers (Sayers & Edwards, 2004:246).

It cannot be denied that rugby has become a lucrative business. At the end of 2004, South Africa, Australia and New Zealand (collectively known as Sanzar) renewed their television broadcasting rights deal, covering the Super 14 competition and the Tri-Nations tests, with Rupert Murdoch’s News Limited and Supersport (the sports arm of South Africa’s pay-per-view broadcaster Multichoice) until 2010 for \$323 million, while it is speculated that News Limited netted another \$100 million from the sale of these rights to other global broadcasters. Broadcasters are potentially affected when high profile players are rested from local or regional matches in order to be fit for tests, as viewership numbers may be significantly affected if these high profile players do not play (Lunsche, 2007:44-45).

The sums mentioned above arguably pale into insignificance when compared to earnings in football. While it is said that the 2006 FIFA World Cup™ generated £1.4 billion in broadcasting rights, sponsorship deals and ticket sales, the five largest leagues in Europe – being England, Italy, Spain, France and Germany – are rumoured to have generated three times as much in the 2004/5 season, with the English Premiership alone generating approximately £2 billion (Beattie, 2006).

Data obtained from SA Rugby relating to the number of players who had gone to play overseas since 2000, both on a short-term or indefinite basis, shows that a total of 3 319 players have moved overseas in the past decade, with an average of approximately 350 players annually, for the years from 2000 to 2008 (SA Rugby, 2009). The data is further analysed and discussed in section 2.3.2.

Ross van Reenen, a non-executive director of the South African Rugby Players Association (SARPA), which was instrumental in providing the consent for this study as required by the five rugby unions participating in the survey, indicated that the topic of migration in rugby was to have been discussed at a conference of the International Rugby Board (IRB) held in Dublin, Ireland on 8 and 9 July 2009. He indicated that migration patterns in rugby were predominantly from the southern to the northern hemisphere, rather than *vice versa*. He noted further that the International Rugby Players Association (IRPA) was concerned about the problem and that it was considered to be “getting out of hand” (Van Reenen, 2009).

The issue of labour migration affects a myriad of sporting disciplines, including American football, athletics, baseball, basketball, cricket, ice hockey, rugby and soccer (or football), all of which are considered subject to recognisable patterns of labour migration (Elliot & Maguire, 2008:483-484; Maguire, 1994:454; Maguire & Pearton, 2000a:176; Maguire & Pearton, 2000b:761). Sport labour migration has been studied quite extensively, with studies into the majority of these areas, although football has arguably been the area which has been investigated most comprehensively, taking account of the collected academic work over the past two decades.

As McGovern (2000:414) remarks, “in an industry where labour is the most critical of resources, the economic power of the wealthiest clubs provides the means to dominate the labour market to the point where they can buy the kind of success that less powerful clubs can never hope to achieve ... [T]his success may be achieved in global sports ... at the expense of the same industry in other countries. In such cases, the less powerful clubs in the donor leagues are trapped in a vicious circle in which they lose players and fans to richer foreign clubs. This, in turn, ensures that the quality of the spectacle that they offer remains relatively low, with the result that they are unable to achieve the kind of

competitive and commercial success that would enable them to recruit and retain better players and larger crowds.”

Maguire and Pearton (2000a:175; 2000b:759) contend that patterns of sport labour migration are not only influenced by economic factors, but also by a range of social, cultural and political factors.

This chapter seeks to place the study in context, through a review of both the academic literature on the topic of sport labour migration, and relevant utterances in the printed media. Sport labour migration will be considered in general and as it applies to rugby specifically. The chapter further considers the factors influencing the decision to migrate, as well as the factors prompting players to return home, in order to generate a list of factors to be utilised in the survey of players at the top five South African rugby unions. Finally, the chapter discusses aspects of income tax relevant to players moving overseas.

2.2 SPORT LABOUR MIGRATION

This section introduces the concept of sport labour migration, and considers relevant aspects of the academic literature, as well as statements in the printed media. The section concludes with a review of the most recent literature on the topic.

2.2.1 Introduction to the concept

In order to be best understood, *sport labour migration* should be seen as a form of (professional) labour migration (Cornelissen & Solberg, 2007:297; Maguire, 1994:453), which is inextricably linked to larger processes, such as globalisation and the general commercialisation of sport (Maguire, 1994:453). Sporting talent has become a saleable commodity in the market for physical and athletic ability, and the individuals with the greatest talent are drawn to those clubs most able to reward them for their talent (Cornelissen & Solberg, 2007:299).

The term ‘*brawn drain*’ was first applied by Bale (1994, cited in Sayers & Edwards, 2004:244) to the problem of sport labour migration, and refers to the “process in which the

athletic and sporting talent of lesser-developed countries is siphoned off by colleges and professional teams from more economically advanced nations” (McGovern, 2000:401).

Bale and Maguire (1994, cited in McGovern, 2000:402) noted that the reason for the migration of sporting talent to other countries is often not because of factors related to their countries of origin.

The area of sport labour migration started attracting attention in the early 1990s, when Maguire (1994:452), a leading contributor to the field, noted that “the study of sports labour migration remains in its early stages”.

In 1994, Maguire (1994:452) reviewed the existing literature on sport labour migration, in order to consider the various factors relevant to the topic. In addition, in a case study he contemplated the role of American players in the commercialisation of English basketball, as well as the negative reaction from ‘locals’ to their participation.

Maguire (1994:454-456) observed that, particularly in soccer, labour tends to move from less affluent nations or those where the sport is less popular, to more economically powerful countries, where the leagues are able to afford the transfer fees concomitant with player moves, as well as higher salaries to attract top quality players. This applies in particular to the movement of African soccer players to Europe.

While sport labour migration tends to be temporary, some sports migrants settle in their ‘host’ country, either through marriage to a citizen or by qualifying for citizenship after spending a certain amount of time in the country. In addition, sport labour migration may be seasonal, for example in cricket and rugby where the seasonality of the sport results in two different playing seasons in the northern and southern hemispheres, affording players the opportunity to practise their craft year round (Elliot & Maguire, 2008:484; Maguire, 1994:456; Maguire & Pearton, 2000a:177; Maguire & Pearton, 2000b:760, 764).

Maguire (1994:457-460) argues that there are four main issues connected to the topic of sport labour migration warranting research, these being:

- The labour rights of the players;
- The deskilling of, as he puts it, ‘donor’ countries;

- The impact on the 'host' (or receiving) culture; and
- The effect on the success of national teams, in both the donor and host countries.

Cymrot and Dunlevy (1987:50) set out to determine whether the Polachek and Horvath model of 'perspicacious peregrinators', which states that the decision of individuals to migrate is determined by the size of the potential gain, applies to Major League Baseball players in the United States of America (USA or US), by studying both those players who had moved between different teams and those who had not moved, to establish whether these groups were motivated by different factors. They found that the expected gain in income was a significant factor in the decision to migrate, but that the decision was influenced both by factors relating to the different locations to which a player could migrate, as well as the characteristics of the players themselves.

For those players eligible to move, they also found a positive correlation between the potential gain in earnings, after accounting for the cost of moving, and the decision to migrate – transfer restrictions meant that certain players were ineligible to move even if they wished to do so (Cymrot & Dunlevy, 1987:51, 57). In addition, they found that prior moves were more likely to predispose a player to moving again in future (Cymrot & Dunlevy, 1987:53, 57).

2.2.2 Sport labour migration in context

European teams have been significantly affected by the Bosman ruling of the European Court of Justice in 1995, which ruled that restrictions on movements of foreign players (relating to transfer fees and quotas) were contrary to European Union law. In 1992, only 5% of players in the English Premiership were foreigners, although this had increased to 45% by the 2004/5 season (Beattie, 2006; Stead & Maguire, 2000:59).

Maguire and Pearton (2000a:175; 2000b:759-760) investigated the process and impact of globalisation in football, with reference to the migration patterns of the players constituting the squads of the 32 countries taking part in the 1998 FIFA World Cup™ finals. As a result of their investigation, they identified the Union of European Football Associations (UEFA) as the so-called 'core economy' in world football, being the most prodigious importers of foreign talent, and argued that player migration is impacting not only the face

of club soccer in Europe, but also the development of local players, player recruitment and retention, as well as the viability of the national teams of both the host and donor countries. Refer to section 2.2.4 for a more detailed discussion of the advantages and disadvantages of sport labour migration.

Sporting talent in less developed nations is often underutilised, with the result that these players migrate to countries which are comparatively more powerful in the global sports arena. An example is the drain of football talent from the former Soviet bloc, Africa and South America to the more powerful leagues of Western Europe (Maguire & Pearton, 2000a:177; Maguire & Pearton, 2000b:760, 764).

McGovern (2000:401) carried out a study of the brain drain from Irish football to English league clubs, and its impact on the (resulting) underdevelopment of Irish football. He makes the point that the success of professional football is based solely on its 'employees', being the players. Problems arise when teams are outbid for talent by other, more economically powerful clubs (McGovern, 2000:404). It is argued that the same applies to rugby, as rugby teams also rely on their players for their success.

Stead and Maguire (2000:36-37) conducted a study of the motivation of Nordic/Scandinavian football players playing in English leagues, through the use of personal interviews and questionnaires, by focusing on the migration experience, as opposed to migration patterns. They observe that "the world of sport has not been immune from developments in international labor (sic) migration" and note the growing number of elite sportsmen plying their trade in countries other than their home country (Stead & Maguire, 2000:36).

A study by Ben-Porat (2002:54) reflects on the importation of foreign players by the Israeli football league and the reasons for this. He comments on the influx of foreign players into the European football leagues, specifically in England, Spain, Italy, Belgium and France, and notes, "it appears that no modern football league could survive without foreign players" (Ben-Porat, 2002:54). This so-called globalisation in football is deemed to be driven by capitalist motives, partly fuelled by the increasing foreign investment in clubs (Ben-Porat, 2002:57).

Magee and Sugden (2002:421) conducted a study into sport labour migration, with specific reference to football in the English Premier League. The study aimed to explain labour migration in football, taking account of the globalisation and commercialisation of the sport, based on the results of interview-based empirical research conducted among a small sample of foreign players playing in the English Premier League at that stage. They reiterate that the study enhances the framework for sport labour migration, as it focuses on primary research into one specific sport (Magee & Sugden, 2002:429), which is similar to the approach followed in this study. Based on the findings from the interviews, they developed a typology to explain the individual reasons behind sport labour migration, which is further discussed in section 2.4.1.

Magee and Sugden (2002:421-422) observe that more than 500 overseas players were active in the English football leagues during the 1998/99 season. They postulate that this resulted from a number of factors, including the commercialisation of the sport with the introduction of the (European) Champions League, the removal of restrictions on the flow of labour within the European Union as a result of the Bosman ruling mentioned earlier, and increased media and sponsorship revenues.

They also noted that football labour migration tends to flow from the 'semi-peripheral' and 'peripheral' states, such as Africa and the Americas, to the 'core' nations, mostly to be found in Europe (Magee & Sugden, 2002:428), and that the basic economic principle of supply and demand plays a significant role in the process, as professional players, first and foremost, play the game in order to earn a living (Magee & Sugden, 2002:429).

In a follow-up review performed 10 years after his 1994 study, Maguire (2004:477) notes even then that "research into sport labor (sic) migration is in its relative infancy". He also employs the concept of core (economically powerful) states, mainly in Europe, and peripheral or semi-peripheral (less powerful) states, including Africa and the Americas, and emphasises again that sport labour is lured to the wealthy, higher paying core states, resulting in a loss of skills in the peripheral and semi-peripheral states, which had invested in the development of their talent (Maguire, 2004:478). In addition, he argues that research into the topic has to consider the broader sociological issues, if one is to understand the processes governing sport labour migration (Maguire, 2004:479).

2.2.3 Recent articles on sport labour migration

Sepp Blatter (cited in Beattie, 2006), the president of the Fédération Internationale de Football Association (FIFA), is quoted as saying that the globalisation of soccer is “exerting a malign influence on football and producing a high-stakes trade in humans”.

In 2006, it was reported that the striker Thierry Henry had finally signed a four-year contract with Arsenal Football Club worth £110 000 per week, an event which was considered more important than winning the Champions League final by club manager, Arsene Wenger, as Henry’s presence proved a pivotal factor in attracting or retaining other players (Hughes, 2006) – Henry has subsequently moved to Barcelona Football Club.

The sentiment was echoed by the Queensland Reds general manager, Alex Pope, after the re-signing of Rodney Blake. Pope (cited in Smith, 2006) expressed the view that the loss of Blake may have led to a “mass exodus” by other players, had he gone to another Australian or a French club, and noted that Blake was important to the team, not only because of his physical abilities, but also because of his contribution to teambuilding and morale.

In the only South African study on sport labour migration, Cornelissen and Solberg (2007:295) conducted a study of football labour migration, comparing the trends in and reasons for the migration of African players to South Africa to the migration of African players to the European leagues. They also considered the impact of South Africa’s hosting of the 2010 FIFA World Cup™ on the budding phenomenon of player migration from the rest of Africa to South Africa.

As noted earlier, international football migration tends to flow towards the European leagues, including England, Germany, France, Italy and Spain, which draw their revenue from the sale of television broadcasting rights (Cornelissen & Solberg, 2007:296).

The most recent research conducted in the area of sport labour migration (known as the brawn drain) was carried out by Elliot and Maguire (2008:482-483), drawing on research into the migration of other highly skilled workers (commonly referred to as the ‘brain

drain'), in areas such as accounting, banking, finance and law, in an attempt to better understand the concept of sport labour migration.

Michel Platini (cited in Blitz, 2009a; Blitz, 2009b), the president of UEFA, was recently reported to have expressed concern about the level of salaries paid by the biggest and richest football clubs to their star players. This has led to a number of problems, among which are an arguably unhealthy dominance by these clubs, as well as smaller clubs facing bankruptcy owing to the levels of debt they have had to incur to try and keep up with the large clubs. This has led to speculation about UEFA imposing limits on squad sizes as well as a 'luxury tax', which would be imposed on players' salaries in excess of a certain limit – the income so generated would then be redistributed to poorer clubs (Blitz, 2009a; Blitz, 2009b).

Michel Platini's comments support other statements indicating that the balance of power rests with the richer clubs, as they generate more money from sponsorships, ticket sales and investment by rich owners, which then allows them to outbid smaller, poorer clubs in attracting the top football talent (Beattie, 2006). The US National Football League (NFL) overcomes this problem through the imposition of salary caps and the redistribution of talented young players and money between clubs (Beattie, 2006).

2.2.4 Advantages and disadvantages of sport labour migration

Sport labour migration arguably has advantages and disadvantages for the both the donor (those supplying players) and host (those receiving players) countries.

One of the *disadvantages* of sport labour migration is arguably the deskilling of donor countries through the loss of their talented players to more economically attractive destinations, leading not only to a decline in the level of competition in the donor country, but more often than not also to a decrease in the competitiveness of the donor country's national team when international fixtures conflict with club obligations (Cornelissen & Solberg, 2007:295; Maguire, 1994:458; Maguire & Pearton, 2000a:178; Maguire & Pearton, 2000b:762; McGovern, 2000:409-410). A local example of this would be the much publicised debate regarding Benni McCarthy's involvement with Blackburn Rovers, impacting on his commitment to the South African national soccer team, Bafana Bafana.

However, the *advantages* to the donor country are that the standard of play is deemed to be influenced positively by the exposure of migrant players to a higher standard of play at foreign clubs, which in turn raises the level of play of their national team mates who play in local leagues, through their interaction with these migrant players (Maguire & Pearton, 2000b:766; McGovern, 2000:415).

In contrast, the *disadvantages* of the importation of foreign players by host countries are that talented local players are denied the opportunity to develop, which also affects the competitiveness of the host country's national team (Cornelissen & Solberg, 2007:302-303; Magee & Sugden, 2002:422; Maguire, 1994:459-460; Maguire & Pearton, 2000a:178-179; Maguire & Pearton, 2000b:762, 767). This often results in leagues imposing quotas on foreign players in order to protect and develop local talent. However, at club level, the focus is almost exclusively on strengthening the club's team with little regard for the impact on the national team (Maguire, 1994:459-460).

Silvio Berlusconi (cited in Maguire, 1994:460), a previous owner of the world-renowned football club, AC Milan, was quoted as saying that "the concept of the national team will, gradually, become less and less important. It is the clubs with which the fans associate". It may be argued that this trend is not yet prevalent in South African rugby, where fans, although supremely loyal to a provincial team, still associate very strongly with the Springboks, and where playing for the Springboks is considered the ultimate honour in South African professional rugby.

Nevertheless, there are also *advantages* to the host country, in that local players benefit from the experience of playing with and against players from a different league, which generally improves standards of play. Other benefits at club level are the increased entertainment value of 'multinational' teams, which results in increased spectator attendance, as well as heightened media coverage and sponsorship (Magee & Sugden, 2002:422; Maguire, 1994:468; Maguire & Pearton, 2000b:766-767).

Ben-Porat (2002:61) also reflects on a negative aspect of globalisation in football, being the detrimental impact on opportunities for local players to participate in the game, but

observes that the inclusion of foreign players was almost a prerequisite for competing in Europe at that time.

The problem has also been remarked on in the printed media. Smith (2004) comments on the problems prevailing in Australian soccer, as almost all of its best players are playing overseas, and consequently contribute very little to the domestic game.

Beattie (2006) notes that in 2006, all 23 members of the Ivory Coast's soccer World Cup squad, and all but three players in the Brazilian national squad, were playing in overseas rather than domestic leagues. However, although the domestic leagues suffer to some extent from the drain of talent, the players themselves benefit from playing with the best in the world, and it could be argued that the national sides benefit when these players put their skills to use at national level, such as in the FIFA World Cup™. The reverse could be said to be true for those countries importing players – young domestic players are denied an opportunity to develop due to clubs importing talented foreign players; lower division clubs are also losing an essential source of income, that is, the sale of talented youngsters to Premier League clubs (Beattie, 2006).

2.3 SPORT LABOUR MIGRATION AS IT APPLIES TO RUGBY

This section considers the topic of sport labour migration as it applies to rugby, both worldwide (mainly Australia) and in South Africa in particular.

2.3.1 Labour migration as it affects rugby worldwide

Collins (2000:71) carried out a review of Australian rugby league players who had gone to play in Britain between 1907 and 1995, to determine the impact of this phenomenon on both countries. He notes that, although globalisation in sport had become very topical during the 1990s, global migration in rugby league had been prevailing for more than a century.

The Courier Mail (2009) reported recently on attempts by the Queensland Reds to retain five players (captain Berrick Barnes, Greg Holmes, James Horwill, Digby Ioane and Hugh McMeniman), who were also reported to be “at the heart of the Wallabies [team]”. This

was after another four players from the 2008 side (Rodney Blake, Sam Cordingley, Chris Latham and Clinton Schifcofske) had gone to play in the United Kingdom (UK) and France.

Given the 'raids' on Australian rugby players by British, European and even Japanese clubs, the Australian Rugby Union is reported to have assisted its provincial teams in retaining players considered to be indispensable to the national side, although it was argued that Australian sides could not forever be forced to match lucrative deals solicited by players' agents in the international rugby market. One example cited is an AUD2.4 million three-year deal offered by English club Worcester to Steve Larkham (Smith, 2004). Smith (2004) refers to the 'player drain', citing as example three Queensland Reds players who had left Australia to join overseas clubs, with another one rumoured to be considering a move.

The former ACT Brumbies player, Tim Atkinson, moved to the Queensland Reds in response to their need for a scrumhalf, after the Queensland Reds' other possibilities had gone to play in the UK. Atkinson (cited in Tucker, 2002), who used to play at inside centre, was quoted as saying that his decision was a positional one, rather than being driven by the clubs he could play for. A number of other Queensland Reds players had also decided to move to other clubs when opportunities at the Reds seemed limited (Tucker, 2002).

2.3.2 Labour migration in South African rugby

Labour migration in rugby has been an issue for many years, but arguably the first high profile migration since the move of former Springbok captain Francois Pienaar to Saracens in England in 1997 was that of Percy Montgomery, former Springbok fullback, to Newport in Wales in 2002 (Colquhoun, 2002).

In August 2002, Colquhoun (2002) reported that eight Springboks from the 2001 squad (being Johan Ackermann, Thinus Delpont, Robbie Kempson, Percy Montgomery, Japie Mulder, Pieter Rossouw, Braam van Straaten and André Vos) and five from the 2000 squad (namely Selborne Boome, Warren Brosnihan, Charl Marais, Werner Swanepoel and Dan van Zyl) had gone to play in the UK during that and the previous year (with one going to play in France). Thinus Delpont, the other potential Springbok fullback at the time of Montgomery leaving, had gone to play for Gloucester in England. This turn of events was

in stark contrast to the situation in Australia, where the Wallabies had lost only two of their 2001 squad.

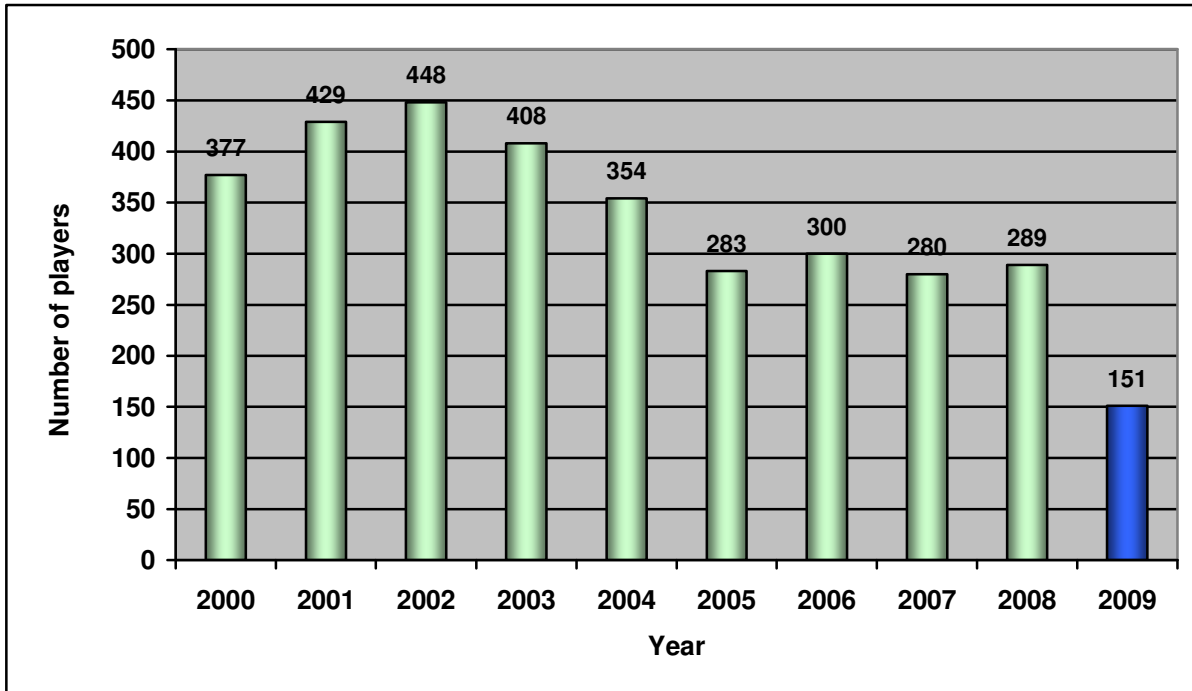
He further notes that uncapped players could be selected for the test sides of their adoptive countries after having gone to play overseas, mostly in the UK, France and Italy, thus playing overseas is possibly a means to earning a test cap, albeit for a player's adoptive country (Colquhoun, 2002).

SA Rugby provided data on South African rugby players from all levels – that is, school, club, provincial and national level – who had gone to play overseas since 2000 up to and including September 2009. Their database contains data on the players, at which level and where they played previously, which country and club they were moving to, and for how long. SA Rugby's database also indicates whether a player intends to play overseas for a defined period of time (often only one season) or whether he intends moving overseas indefinitely.

The database was analysed, firstly to determine how many players had gone to play overseas in the past decade, secondly to establish where they had moved to, and lastly, to determine the expected length of stay at the foreign club.

The number of South African rugby players who had gone to play overseas in each of the past 10 years, amounting to 3 319 players in total, is set out in [Figure 1](#) below (SA Rugby, 2009). It is emphasised that the information for 2009 does not relate to a full year, and the lower number of players moving overseas in this year should thus not be seen as indicative of a trend that overseas migration is decreasing.

Figure 1: Number of players migrating overseas per year – 2000 to 2009 (n = 3 319)



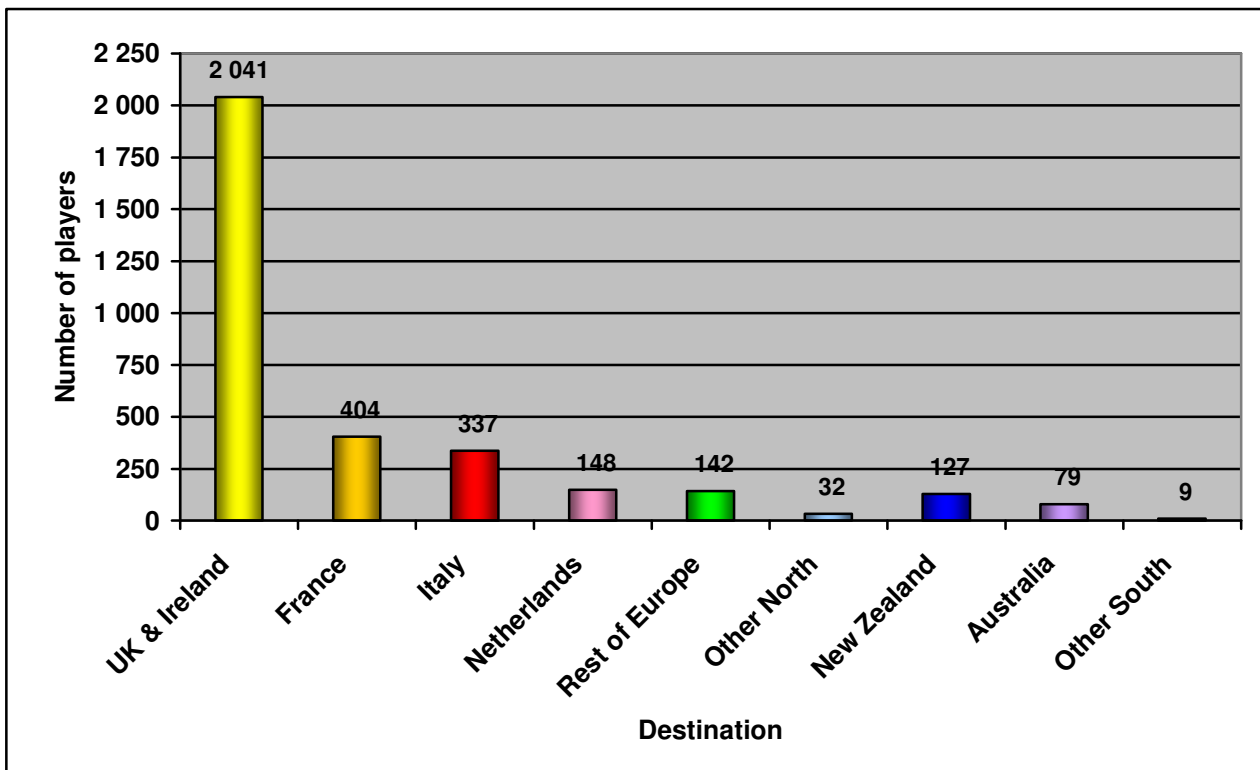
Source: Adapted from the database of overseas players (SA Rugby, 2009).

On average, approximately 350 players annually have gone to play overseas – either on a short-term or indefinite basis – for the years from 2000 to 2008, with the peak being noted in 2002, when 448 players went to play overseas (SA Rugby, 2009).

The countries to which South African players had moved were identified next, and the results are set out in [Figure 2](#) below. As indicated in Chapter 1, the individual nations in the United Kingdom were grouped with the Republic of Ireland for the purpose of this analysis.

Owing to the small number of players going to play in certain ‘fringe’ countries, these were grouped together to simplify the analysis. The countries included in ‘Other North’ in [Figure 2](#) below are Canada, Hong Kong, Japan and the USA, while Argentina, Madagascar, Mauritius and Namibia comprise ‘Other South’ in the analysis. The category ‘Rest of Europe’ includes Denmark, Germany, Israel, Monaco, Portugal, Russia, Spain and Sweden, each attracting no more than 14 players during this period, with the exception of Germany (n = 53) and Portugal (n = 41) (SA Rugby, 2009).

Figure 2: Summary of player migration by destination country – 2000 to 2009 (n = 3 319)

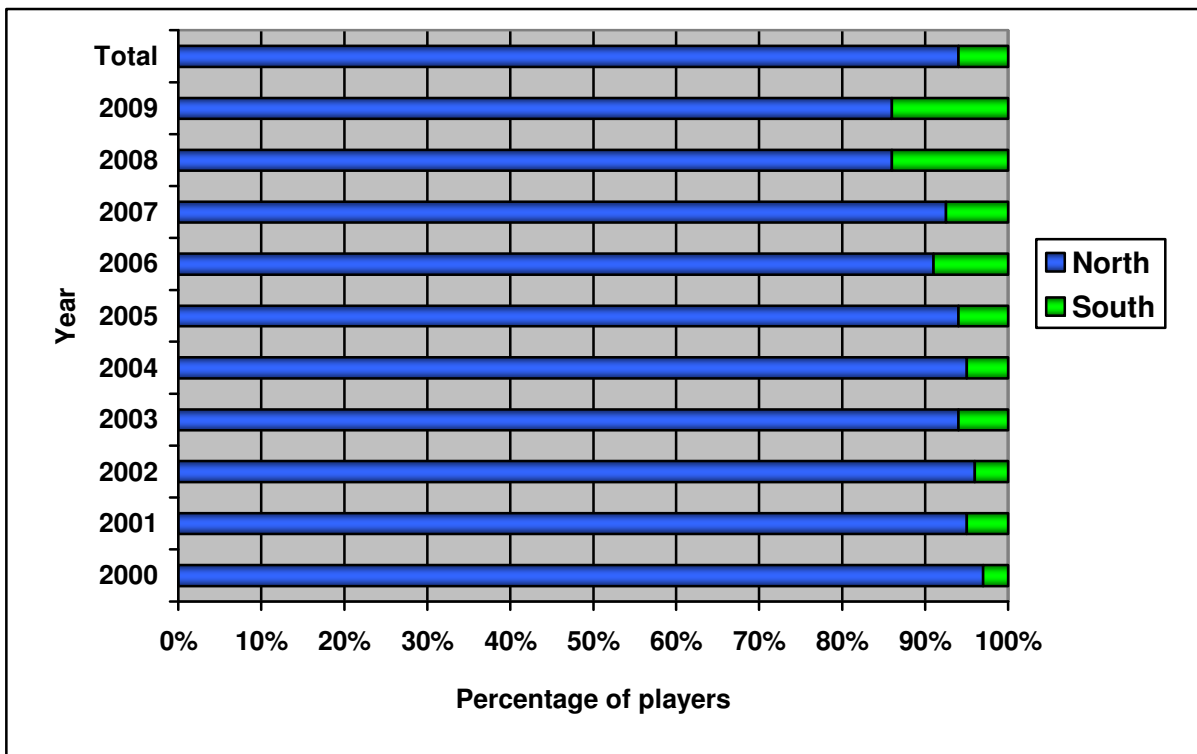


Source: Adapted from the database of overseas players (SA Rugby, 2009).

It can be seen that the most popular overseas destinations for South African rugby players are the UK and Ireland, which have attracted 61% (n = 2 041) of players since 2000, with France and Italy accounting for another 12% (n = 404) and 10% (n = 337) of players respectively. In summary, 83% of players have gone to play in those three destinations over the past decade (SA Rugby, 2009).

Given Ross van Reenen’s comments, referred to in the introduction to this chapter, that the problem of labour migration in rugby was more pronounced from the southern to the northern hemisphere, the data represented in Figure 2 was aggregated by hemisphere, in order to validate that statement. The results are set out in Figure 3 below.

Figure 3: Player migration by major destination – 2000 to 2009 (n = 3 319)

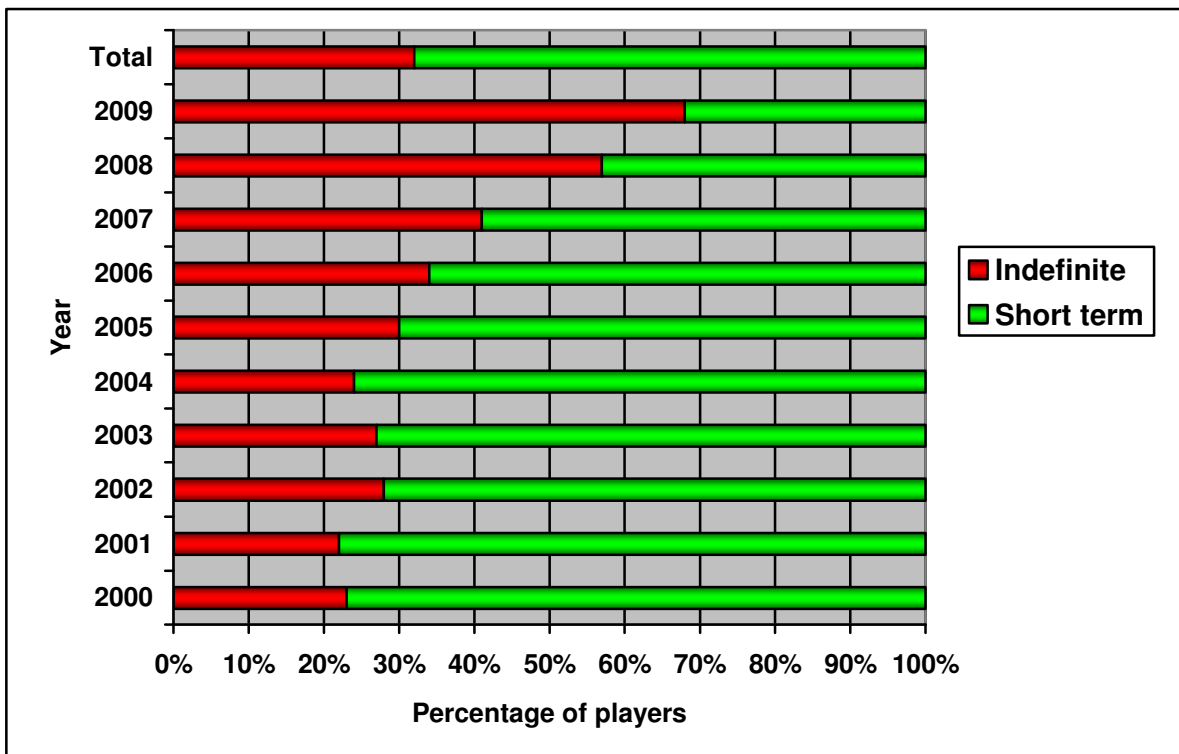


Source: Adapted from the database of overseas players (SA Rugby, 2009).

Although the data for 2009 is again distorted by the fact that it does not apply to a full year, the analysis clearly supports Van Reenen’s statement, as 94% of players went to play in the northern hemisphere during the decade since 2000 (SA Rugby, 2009).

The data obtained from SA Rugby was analysed to evaluate the percentage of South African rugby players who intended playing overseas indefinitely compared to those who intended returning after a period of time. The results are set out in Figure 4 below.

Figure 4: Player migration by expected length of stay – 2000 to 2009 (n = 3 319)



Source: Adapted from the database of overseas players (SA Rugby, 2009).

The analysis indicates that over the past decade, 32% of players indicated that they were intending to stay overseas indefinitely, while 68% indicated that they intended returning to South Africa at some point (SA Rugby, 2009). It would, however, appear as if the trend is moving towards players staying for an indefinite period, as more than 50% of players moving overseas in each of the past two years have indicated that they intend staying for an indefinite period of time.

2.4 FACTORS AFFECTING OUTWARD MIGRATION

This section discusses the factors affecting sport labour migration to foreign destinations, by considering the typology found in the academic literature, as well as by means of a review of the academic literature and statements in the printed media.

2.4.1 Typology of sport labour migration

Both Maguire (1999, cited in Maguire, 2004:478-479) and Magee and Sugden (2002:429-434) have developed typologies to attempt to explain the motivations of players opting to

play elsewhere. Maguire (2004:480) reasons that typologies are unlikely to be mutually exclusive or produce hard and fast rules and, as such, often overlap.

In their typology, based on an interview-based study of foreign footballers playing in the English Premier League, Magee and Sugden (2002:429-434) identify six distinct types of player, each motivated by different factors. These types, which are discussed in more detail below, are:

- Mercenary;
- Settler;
- Ambitionist;
- Exile;
- Expelled; and
- Nomadic cosmopolitan.

The typology identified by Magee and Sugden does not differ significantly from that of Maguire, although Maguire (1999, cited in Magee & Sugden, 2002:429) applies the terms pioneer, settler, returnee, mercenary and nomadic cosmopolitan.

In an interview, Anders Limpar (cited in Magee & Sugden, 2002:430), a Swedish national playing for the English football club Everton at the time, is cited as saying “every footballer who does not say money is the basics is a liar ... at the bottom, it is the money that talks, and that is just a fact for every athlete in the world”. He reiterates the views of other players interviewed for the study by Magee and Sugden, many of whom indicated that money was a primary motivator in the decision to relocate, especially as football as a career is comparatively short, and the motivation to earn as much as possible increases towards the end of a player’s career, when he has to start thinking about life after football, and earning enough to support that life – this is an example of the *mercenary* type (Magee & Sugden, 2002:430).

The authors comment that one should not be overly critical of players motivated by money, as their careers are often cut prematurely short, either by age or injury, and rarely last more than 15 years, during which time they need to make the most of their talents (Magee & Sugden, 2002:435).

Other players noted the benefits of living in a country like England, with its sophisticated education system, which is particularly relevant to those foreign players with families – this is an example of the *settler* type (Magee & Sugden, 2002:431).

Another factor the authors identified was ambition, either of playing in a top league, or simply of playing professional football, wherever it may be – this is an example of the *ambitionist* type (Magee & Sugden, 2002:431-432).

Then there are those who are forced to leave their home country and play abroad, whether for political, personal or professional reasons, for example a lack of opportunities to play at the top level at home – this is an example of the *exile* type (Magee & Sugden, 2002:432). They are contrasted with those who are, essentially, expelled from their home country and forced to migrate, either because of behavioural issues or unwelcome media exposure – this is an example of the *expelled* type (Magee & Sugden, 2002:433).

Others move around simply to satisfy their wanderlust and in an attempt to experience different cultures – this is an example of the *nomadic cosmopolitan* type (Magee & Sugden, 2002:432).

Although not included in the above typology, Magee and Sugden (2002:433-434) argue that a new category may be required, that of *celebrity superstar*, where a player is forced to migrate to escape intense media scrutiny, with David Beckham arguably being the most recognisable example, not only in football, but in sport globally.

Magee and Sugden (2002:434) express the same opinion as Maguire, in that, when applying a typology, one has to be flexible when categorising players' motives, as more often than not, a player is motivated by more than one set of factors. In addition, players' motives are likely to change as their career progresses.

2.4.2 Financial factors

It was reported in 2008 that Manchester City Football Club had paid £32.5 million in transfer fees to acquire Robinho, their Brazilian striker, while the top 10 players in the European league earned in excess of £120 000 per week (Blitz, 2009a; Blitz, 2009b).

The study of Major League Baseball players by Cymrot and Dunlevy (1987:58) concluded that the decision to migrate is primarily driven by the expected economic gain, as well as a player's history of prior moves.

Collins (2000:71, 79) noted that the main reason why rugby league players migrate is the financial benefit in the form of lucrative contracts.

Maguire and Pearton (2000b:761) remark that "migration is clearly influenced by the economic rewards available to owners, agents and athletes" and argue that the economic imperative applies most strongly to transitory migration.

Stead and Maguire (2000:45) noted that the financial incentive is motivated more by a desire for financial security than financial rewards or a "passage to riches" *per se*. Although respondents in their study indicated that financial considerations were not the main factor in the decision to move, they were noted to refer to the matter quite frequently.

Both clubs and players are considered to benefit from migration in sport and both are arguably motivated by financial reasons. Clubs require foreign players to improve on-field performance and hence the clubs' value in the market, while for players, "money was and still is, the ultimate reason for mobility" (Ben-Porat, 2002:55). Ben-Porat (2002:55) notes further that foreign players usually do not immigrate to their new destination, but migrate on a temporary basis only, which he argues emphasises the fact that the move is motivated primarily by financial gain.

According to Colquhoun (2002), the most important reason why South African players leave to play overseas is money, influenced by the depreciation of the Rand at the time – what he refers to as "the dash for cash". In addition, losing Springbok status could result

in a player's income being halved, which provides a further incentive to consider lucrative offers from overseas.

Commenting on Rodney Blake's negotiations with the Queensland Reds, Smith (2006) also observes that the amount of money a player can command increases once he has earned a test cap.

2.4.3 Other factors influencing the migration decision

Migration patterns are considered to be influenced, at least in part, by the historical and colonial links between donor and host countries, as with the migration of African football players to Europe (Maguire & Pearton, 2000a:184; Maguire & Pearton, 2000b:764).

Migration patterns are also influenced by a compatibility of cultures, or the adaptability of certain nations to other cultures, such as South American players who fare well in Spanish and Portuguese cultures, or Nordic players who adjust with relative ease to the English language and lifestyle (Maguire & Pearton, 2000a:185, 187; Maguire & Pearton, 2000b:766). However, Maguire and Pearton reiterate that migration is not influenced by economic factors alone, but by a range of political, social and cultural factors, including the desire of migrant players to compete at the highest level (2000a:184, 187-188; 2000b:766).

McGovern (2000:405) found that Irish football players tend to sign with English league clubs owing to the improved financial and sporting opportunities. He also argues that the choice of destination is influenced by the presence of their compatriots, thereby providing them with a 'home away from home' (McGovern, 2000:413).

The study by Stead and Maguire (2000:43) also revealed a quest for experience, and the related mental and physical challenge of playing in a competitive league, as the main factor motivating the decision to migrate. A lack of opportunities at home also influenced the decision to move (Stead & Maguire, 2000:44).

However, they found that salary, as well as the employment conditions at the club under consideration, were the main motivating factors in the decision of *where* to move, with the

club's status being deemed less important. The ability to speak English was also noted as an important factor in the decision (Stead & Maguire, 2000:49).

Other factors which received consideration are personal development and investment in oneself. Stead and Maguire (2000:44, 54) refer to the "rite de passage" which players experience as a result of an international move and note that this is equally as important as the economic motive. The Nordic/Scandinavian players considered in their study displayed a strong pursuit of experience, as well as an interest in learning about themselves and other cultures.

Former Springbok Robbie Kempson (cited in Colquhoun, 2002) mentioned the challenge of playing overseas coupled with the experience to be gained from an overseas move.

Sayers and Edwards (2004:243-244) comment on the fact that the career of a professional sportsman is often short and, indeed, risky, the greatest risk being that of serious injury, reiterating the comments of Magee and Sugden (2002:435). As these players' income often depends on their performance, serious injury poses a real threat to financial sustainability. The relative brevity of a career in sport is therefore often compensated for by higher salaries (Sayers & Edwards, 2004:243-244).

Another factor affecting sports professionals is the uncertainty of life after their careers have ended, as these professionals are often groomed in a particular sport from very early on and therefore often do not obtain a tertiary education or some other means of supporting themselves after their careers have come to an end. As a result, they strive to earn as much as possible over a short career (Sayers & Edwards, 2004:244), again confirming the comments by Magee and Sugden (2002:435).

Ross and Dunn (2007:643) also observed that baseball players' income from sport is confined to a small period and that players may be disposed to moving in order to earn large amounts of money during their short career, supporting the findings of Magee and Sugden (2002) and Sayers and Edwards (2004).

Toutai Kefu, a former Queensland Reds and Australian national player, is considered to be “cashing in financially in the twilight of his career”, as he is ending his career in Japan (Smith, 2004).

Sports stars often achieve celebrity status in their home countries and have to cope with relentless scrutiny by the media. The better a player performs, the higher the media interest, although this tends to limit their individual freedom to a certain extent (Sayers & Edwards, 2004:246). Often players migrate in order to escape unwanted media scrutiny.

Reporting on the reasons for hockey stars from Sweden opting not to play at home, Yorio (2004:5) notes that players are driven overseas by a wealth tax (1.5% of total worth) and significant contract insurance costs, which reduces their take-home pay.

The Economist (2005) cites a number of reasons for labour migration from Africa in general, including better pay, more attractive career opportunities, better work conditions and a better lifestyle, noting that South Africans are also influenced to move overseas by crime and affirmative action, which fits into the exile category of the typology discussed in section 2.4.1.

According to the Management Today Yearbook (2008:22), “quite a few of the [2007 Rugby] World Cup heros (sic) face premature retirement because of political interference”, referring to the impact of racial quotas (arguably a form of affirmative action) on Springbok team selection. It further argues that players should not be forced to play elsewhere because of quotas.

Cornelissen and Solberg (2007:299) identified a number of reasons for football labour migration from the literature, namely financial gain, the opportunity to participate in the highly competitive European leagues and personal development, coupled with increased exposure and publicity, echoing the findings of Magee and Sugden (2002), Maguire and Pearton (2000a; 2000b) and Stead and Maguire (2000). They do however concede that mobility in sport is not solely motivated by commercial reasons (Cornelissen & Solberg, 2007:300).

In their recent study, Elliot and Maguire (2008:485-486) reiterate that migration in sport is seldom caused by one single factor, although the most important is usually financial gain; sport labour migration is more often than not influenced by a series of interdependent processes, including cultural factors and a search for new challenges and experience at the highest level of play, while a lack of opportunities at home is also seen to play a role. Nevertheless, financial gain is still deemed to be the primary factor in transitory migration (Elliot & Maguire, 2008:490).

Given that an international move leads, to a certain extent, to upheaval in a player's life, players are advised to consider the full implications of migration prior to making a decision. A number of players in the study by Stead and Maguire commented on the fact that they had not realised what an international move entails and that players have to be prepared to cope with the consequences (Stead & Maguire, 2000:46). Players often commented on the psychological preparation required (Stead & Maguire, 2000:54).

2.4.4 Taxation specific factors

Some 90% of foreign soccer players in the UK, as well as cricketers, racing drivers and tennis players, are reported to receive a portion of their earnings tax-free, by registering so-called 'image rights' offshore, in order to avoid paying a 22% withholding tax to the UK's Inland Revenue (Malkin, 2002).

Ross and Dunn (2007:639) conducted a study in order to establish the responsiveness of the rich to state income taxes in the USA, in other words, whether higher tax rates would force a person to move to a state with a lower tax rate, by means of a study of Major League Baseball All Star players. They observed that the rich tend not to migrate from high tax states and attributed this to a variety of factors, including constraints on mobility and a preference for, as they put it, "redistributional government". Their findings indicated that the effective tax rate in a state does however influence the decision of *where* to move, as players take account of their after-tax income in deciding on a destination (Ross & Dunn, 2007:646).

Stead and Maguire (2000:45) also found that players are motivated to a certain extent by taxation, especially in countries with high tax rates.

In his study, Ben-Porat (2002:66) noted that income tax does play a role in player migration, as no income tax was deducted from the income of foreign players in Israel at that time.

Smith (2004) comments on the fact that it is not only bigger contracts but also tax concessions that influence Australian players' decision to play for overseas clubs.

2.4.5 Summary of factors

To summarise, the following factors may potentially impact a player's decision to migrate:

- Financial benefits (Beattie, 2006; Ben-Porat, 2002; Blitz, 2009a; Blitz, 2009b; Collins, 2000; Colquhoun, 2002; Cornelissen & Solberg, 2007; Cymrot & Dunlevy, 1987; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Ross & Dunn, 2007; Smith, 2004; Smith, 2006; Stead & Maguire, 2000; The Economist, 2005);
- A desire to maximise earnings during a short career, or towards the end of a player's career (Colquhoun, 2002; Magee & Sugden, 2002; Ross & Dunn, 2007; Sayers & Edwards, 2004; Smith, 2004);
- The opportunity to gain experience at a higher level (Colquhoun, 2002; Cornelissen & Solberg, 2007; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Stead & Maguire, 2000);
- A lack of opportunities at home (Colquhoun, 2002; Elliot & Maguire, 2008; Magee & Sugden, 2002; Sayers & Edwards, 2004; Stead & Maguire, 2000; Tucker, 2002);
- Crime and/or affirmative action or quotas (Colquhoun, 2002; Management Today Yearbook, 2008; The Economist, 2005);
- The possibility of experiencing other cultures (Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b);
- Ancestral links to the country of destination (Maguire, 1994; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b); and
- Taxation (Ben-Porat, 2002; Malkin, 2002; Ross & Dunn, 2007; Smith, 2004; Stead & Maguire, 2000).

These factors were considered for incorporation into the final questionnaire administered to players – refer to section 3.5.2 for further discussion.

2.5 FACTORS PROMPTING PLAYERS TO RETURN HOME

One of the factors which could prompt a decision to return home is the effect an international move has on a player's family. Where players are joined in a move by their partners, lack of opportunities in the adoptive country for the partner may lead to the partner not being satisfied with the new situation, which could, in some instances, prompt players to reconsider the decision to play overseas (Stead & Maguire, 2000:47-48). Partners and family were often found to be closely involved in the migration decision (Stead & Maguire, 2000:53).

Francois Pienaar was reported to have returned to South Africa in 2002 from playing in England, partly because he missed his friends and family at home, and partly because he thought that South Africa was a better place in which to raise his children (The Economist, 2005). The Economist (2005) argues that South Africa has an advantage over other African countries in attracting expatriates because of its strong and sophisticated economy and first-rate amenities.

Despite approaches from Barcelona Football Club, Thierry Henry apparently decided to remain with Arsenal not because of the money, but due to his love for the club's fans, the potential shown by the young players in the team, his passion for England and his family (Hughes, 2006), although he has subsequently moved to Barcelona Football Club.

Sport migrants may experience 'culture shock' when moving from one culture or country to another if the players' native and adoptive cultures are vastly different (Maguire, 1994:459; Maguire & Pearton, 2000a:179; Maguire & Pearton, 2000b:762). A player's adaptability to a new culture may potentially affect the decision on whether or not to play elsewhere.

Reflecting on his decision to re-sign with the Queensland Reds, Rodney Blake (cited in Smith, 2006) indicated that the opportunity to play in the Super 14 competition, as well as the quality of life in Brisbane, had been factors in his decision to stay with the Reds, although family ties could have influenced him to return to the Waratahs in Sydney. Blake

was however rumoured to have been forced into the decision by the threat of being dropped from the Australian side, should he sign with an overseas club (Smith, 2006).

Collins (2000:74, 83) remarks on the fact that contractual obligations to a player's overseas club and the problems associated with international travel could render them practically ineligible for selection to their national team.

Two Australian forwards, Nathan Sharpe and Stephen Hoiles, have been reported as remaining in Australia, Sharpe despite profitable offers from overseas clubs, mainly in order to be considered for selection to the Australian 2011 Rugby World Cup™ squad (Smith, 2008).

Factors considered to influence Steve Larkham's decision of whether or not to join the English rugby club Worcester are the Australian lifestyle and weather, and the honour of playing for Australia, an option he would have had to relinquish if he had gone to play in England, as players not playing in the Super 14 competition were not eligible for Wallabies selection at that stage (Smith, 2004).

Players who have moved overseas may be prompted to return to their country of origin by loneliness or homesickness (Sayers & Edwards, 2004:245).

Cymrot and Dunlevy (1987:56) postulate that the decision not to migrate is influenced by inertia, as people tend to develop a stronger attachment to a place the longer they remain there, and that the expected gains from migration would have to be consequentially larger to negate this inertia.

In summary, the following factors may potentially impact a player's decision to return home after migrating, or may even influence the decision not to migrate in the first place:

- The impact on family (Stead & Maguire, 2000; The Economist, 2005);
- The availability of well-developed amenities and infrastructure (The Economist, 2005),
- A passion for the country (Hughes, 2006);
- Quality of life and lifestyle (Smith, 2004; Smith, 2006);

- The potential of adapting or not to another culture (Maguire, 1994:459; Maguire & Pearton, 2000a:179; Maguire & Pearton, 2000b:762);
- The opportunity to play in the Super 14 competition (Smith, 2006);
- Ineligibility for national team selection (Collins, 2000; Smith, 2006; Smith, 2008);
- Loneliness and homesickness (Sayers & Edwards, 2004); and
- Inertia (Cymrot & Dunlevy, 1987).

These factors were considered for incorporation into the final questionnaire administered to players – refer to section 3.5.2 for further discussion.

2.6 DISCUSSION OF RELEVANT INCOME TAX REGULATIONS

This section looks at the relevant provisions of South African income tax legislation, as well as the regulations of the double taxation agreements (DTAs) between South Africa and a number of countries.

2.6.1 Income Tax Act

In terms of the Income Tax Act, 58 of 1962 (the Act), taxpayers are liable for tax on their *taxable income*, which is the result of gross income less exempt income, less certain allowable deductions, plus any taxable capital gain. *Gross income*, in terms of the definition in section 1 of the Act, means

in the case of any *resident*, the total amount, in cash or otherwise, received by or accrued to or in favour of such resident ... excluding receipts or accruals of a capital nature ... (emphasis added).

Since 1 January 2001, South Africa has applied the *residence-based system of taxation*, and all residents are therefore taxable in South Africa on their worldwide income. Billy Joubert (2008:76), a tax director at the professional services firm Deloitte, confirms, “as far as [South African] residents are concerned, income derived from being a professional (or semi-professional) sportsman is subject to tax like any other type of income”. He further notes that should a sportsman incur an assessed loss from his sporting activities, the

assessed loss would be ring-fenced (in terms of section 20A of the Income Tax Act) to other income from the same trade.

Section 1 of the Act defines a *resident, inter alia*, as “any natural person who is ordinarily resident in the Republic [of South Africa]”.

Although the term *ordinarily resident* is not defined in the Act, the meaning has been interpreted in case law; it is deemed not to be solely dependent on physical presence. **Cohen v CIR** 1946 AD 174 (13 SATC 362) laid down the principle that a person is considered to ordinarily resident in the country which a person considers his home, and to which he would return from his wanderings. In **CIR v Kuttle** 1992 3 SA 242 (A) (54 SATC 298) it was established that ‘ordinarily resident’ has a narrower meaning than ‘resident’, and that it refers to the place where a person has his ‘real home’, or his principal residence.

On this basis, it is clear that players who go overseas on short-term contracts would be taxable in South Africa on their foreign income, as they will still be deemed residents of South Africa and therefore liable for tax in South Africa on their worldwide income. Taxation as a factor in the decision to play overseas could then be considered irrelevant.

However, the second proviso to the definition of resident in section 1 of the Act states that

where a person who is a resident ... is physically outside the Republic [of South Africa] for a continuous period of at least 330 full days immediately after the day on which such person ceases to be physically present in the Republic, such person shall be deemed not to have been a resident from the day on which such person so ceased to be physically present in the Republic.

Based on the second proviso, a player who went (and stayed) overseas for more than 330 days consecutively would not be considered to be a resident in terms of the South African Income Tax Act, and would therefore not be taxable in South Africa on his foreign income. To take cognisance of this fact, the final questionnaire (refer Appendix C) asked players to consider the factors which would influence their decision to move overseas on a

long-term basis, so as to rule out short-term contracts which would still see players liable for tax in South Africa.

Given the fact that players may find themselves being taxed both in South Africa and a foreign country, either when playing on a short-term basis or when they do not meet the requirements of the 330-day rule, it is worth considering the relevant provisions of double taxation agreements (DTAs) between South Africa and such other countries. Since the majority of players moving overseas since 2000 have gone to play in the UK and France (refer to the discussion in section 2.3.2), the provisions of South Africa's DTAs with the UK and France, concluded in 2002 (but published in 2003) and 1993 (but published in 1995) respectively, will be considered in the next sections.

2.6.2 Double taxation agreement with the United Kingdom

Article 4 of the DTA between South Africa and the UK deals with the question of residence. It defines a resident as a person liable for tax in one or both of the countries by virtue of their residence. It sets out a hierarchy to determine which state a person would be judged a resident of, if the person was deemed a resident of both states in terms of the states' respective income tax provisions. The hierarchy is based on the following (SARS, 2003):

- The country in which a person has a permanent home,
- The country in which the person's centre of vital interests, being their personal and economic relations, are closer,
- The country in which the person has a habitual abode, and
- The country of which the person is a national.

Article 16 of the DTA deals specifically with sportspersons, and states in article 16(1)

... income derived by a resident of a Contracting State ... as a sportsperson, from that person's personal activities as such exercised in the other Contracting State, may be taxed in the other State (SARS, 2003).

Article 21 of the DTA contains a provision to eliminate double taxation and stipulates that tax paid in the UK by South African residents on income taxable in the UK will be allowed

as a deduction against tax due on taxable income calculated in terms of the South African income tax provisions, subject to the provisions of section 6*quat* of the Income Tax Act (SARS, 2003).

Section 6*quat* of the Act contains a similar provision, in that it allows as a rebate against income tax payable in South Africa the amount of foreign taxes paid on income from a source outside the Republic of South Africa, although the relief granted in section 6*quat* is not available in addition to any relief granted under any double taxation agreement.

2.6.3 Double taxation agreement with France

Article 4 of the DTA between South Africa and France defines a resident for the purposes of the DTA as someone who is ordinarily resident in South Africa. It then sets out the same hierarchy as that applied in the DTA with the United Kingdom, to determine residence where a person is considered a resident of both countries (SARS, 1995).

Article 17(1) of the DTA contains the same provision regarding sportspersons as the DTA with the UK, although it refers to 'athletes' (SARS, 1995).

Article 23 of the DTA, regarding the elimination of double taxation, indicates that taxes paid by South African residents relating to income taxable in France will be allowed as a deduction against South African tax payable (SARS, 1995).

Given the provisions of the DTAs with the UK and France, it is clear that, if deemed a South African resident, a player would not be able to benefit from a potentially lower tax rate in those tax jurisdictions, as he would still be liable for tax at the South African rates, although he would be able to avoid double taxation on his foreign income through the relief provided.

2.7 CONCLUSION

This chapter considered the academic literature and comments in the printed media as applied to sport labour migration in general and rugby specifically. The findings of previous empirical research in the field were considered, together with statements in the

printed media, firstly to place the study in context and secondly, to generate a list of factors which may possibly influence the decision of top rugby players to play overseas or to remain in South Africa, to be utilised in the survey conducted among players at the top five South African rugby unions.

The review of the literature confirms that very few studies relating to rugby specifically have been conducted and that only one study has been carried out in a South African context (see Cornelissen & Solberg, 2007), although that study focused on the inward migration of African football players to South Africa as compared to Europe. There is therefore considered to be a need, in a local context, to determine the reasons for South African rugby players moving overseas.

Relevant sections of the South African Income Tax Act were considered, to determine the impact of income tax regulations on players moving overseas. The provisions of South Africa's double taxation agreements with the United Kingdom and France were reflected upon, as these are the two countries to which South African rugby players migrate most often. These provisions are thus deemed to be relevant to this discussion.

The next chapter discusses the research design and methodology employed in the study and covers the design of the research instrument, including the link between the questions included in the final questionnaire and the theoretical framework discussed in this chapter. It considers a number of other aspects, amongst them the sample size and sampling method, the method and timing of data collection, the validity and limitations of data as well as ethical considerations.

CHAPTER 3: RESEARCH DESIGN AND METHODOLOGY

3.1 INTRODUCTION

As discussed, the aim of the study was to determine the factors which influence the decision of players at the top South African rugby unions to play overseas, and to establish the relative importance of the different factors, specifically taxation, influencing the migration decision.

The previous chapter reviewed the academic literature and the printed media, in order to contextualise the study and to identify the factors which may possibly influence the decision of rugby players at the top five South African rugby unions to play in overseas leagues, to be utilised in the survey.

This chapter will discuss the elements of research design and methodology pertinent to this study, the sample selected for the primary research, the selection and design of the research instrument, the manner of data collection and analysis, and considerations surrounding the validity and limitations of data and research ethics.

3.2 RESEARCH DESIGN

Saunders, Lewis and Thornhill (2007:5) state that *research* is undertaken systematically, in order to find out 'something' to increase knowledge. It is therefore not a haphazard investigation, but should be undertaken with a clear purpose. In contrast, the *research design* is "the general plan of how you will go about answering your research question(s)" (Saunders *et al.*, 2007:131).

The research design serves as a roadmap that covers each stage of the research process, from formulating the research question and objectives to analysing the data (Cooper & Emory, 1995:114). The specific research design is based on a number of factors, taking account of the level to which the problem has been clarified, the method used to collect data, the extent to which the researcher can control the variables being studied, the aim of the research, the time dimension during which the study is undertaken, the scope of the

study, the research environment and the perceptions of the subjects being studied (Cooper & Emory, 1995:114-117). Each of these aspects will be discussed in more detail below.

This is an *exploratory study*, as the exact nature of the problem is not known – the research objectives were to determine the factors which play a role in the decision of players to compete overseas, as well as their relative importance in the decision. The results of this study may form the basis for future research (Cooper & Emory, 1995:115). The study follows an *inductive approach*, as data was collected in order to clarify the problem and conclusions were drawn from the analysis of data, as opposed to a deductive approach, which involves the testing of a hypothesis (Saunders *et al.*, 2007:117-118).

The study was conducted utilising a *survey* of players, to determine the factors influencing their decision to migrate, as well as to establish the relative importance of the different factors, specifically taxation, in the migration decision. As such, the study also qualifies as *empirical research*, as primary data was collected and analysed to address the research objectives (Cooper & Emory, 1995:22-23).

The study follows an *ex post facto design*, as none of the variables under investigation could be manipulated by the researcher, in contrast to an experiment conducted in a laboratory. The purpose is merely to report on the factors as they exist (Cooper & Emory, 1995:115-116).

The purpose of the study is *descriptive*, as it is concerned with finding out the “who, what, where, when, or how much” (Cooper & Emory, 1995:116) of the problem, and less concerned with finding out how one variable influences another or the nature of causal relationships, as is the case in an explanatory study (Cooper & Emory, 1995:116).

This is a *cross-sectional study*, as data was collected at a particular point in time, to provide a snapshot of the problem at that particular point, and there was no attempt to track the progression of the problem over time, as in a longitudinal study (Cooper & Emory, 1995:116).

The study qualifies as a *statistical study*, rather than a case study, as the focus is on breadth rather than depth. In addition, data was collected from a sample of players and analysed quantitatively (Cooper & Emory, 1995:116). However, owing to the exploratory nature of the study, the aim was not to determine the sample statistically, and only limited statistical analysis of the data was performed.

Owing to the nature of the investigation, the study was conducted under *field conditions*, rather than in a laboratory (Cooper & Emory, 1995:117). The impact of the *perceptions* of respondents (Cooper & Emory, 1995:117) will be considered more fully under the discussion of the research instrument (refer section 3.5.2).

3.3 SAMPLING

As indicated, this is an exploratory study and the intention was not to generalise the findings to the larger population. As a result, statistical sampling methods have not been employed.

This section will address the population of the study, as well as the method employed to determine the sample used in the survey.

3.3.1 Target population of the study

The population of the study is the players in the senior teams at the top five South African rugby unions competing in the Currie Cup competition and being allied to the Super 14 franchise, that is, the Blue Bulls, the Free State Cheetahs, the Golden Lions, the Natal Sharks and Western Province (known as the Stormers in the Super 14 competition).

The top five rugby unions were included in the study, as their players are considered to be more likely to be approached to play overseas (refer sections 4.3.2 and 5.6.1 for further detail). Based on anecdotal evidence, players from the smaller unions tend to move first to the larger unions, before going overseas. The top five unions were chosen to participate in the study, in order to ensure a larger sample and to enable some form of comparison between the responses where deemed appropriate.

3.3.2 Sample size and sampling method

There are two methods of sampling: probability (statistical or representative) sampling and non-probability (or judgemental) sampling (Saunders *et al.*, 2007:207). Based on a decision tree provided by Saunders *et al.* (2007:227), *self-selection sampling*, which is a form of non-probability sampling, was selected as the most appropriate sampling method, owing to the exploratory nature of the research and the fact that statistical conclusions were not required. Self-selection sampling involves collecting data only from those individuals who choose to take part in a study, after being made aware of the study (Saunders *et al.*, 2007:233).

Where any statistical analysis is to be performed, Stutely (cited in Saunders *et al.*, 2007:211) advises a minimum sample size of 30. The *sampling unit* of the study was the individual players (Cooper & Emory, 1995:200). In order to perform limited statistical analysis, a sample of 50 was targeted, equating to 10 players from each of the five rugby unions involved in the study.

Based on information supplied by the five unions, the population of players in the senior teams totalled approximately 200, with an average of 40 players per union. Refer to section 3.5.5 for the realised sample size.

3.4 RESEARCH INSTRUMENT

As discussed in section 3.2, primary data was obtained by means of a survey of players at the top five rugby unions in South Africa. Mouton (2001:152) defines *surveys* as “studies that are usually quantitative in nature and which aim to provide a broad overview of a representative sample of a large population”.

This section considers the selection of the particular research instrument employed in this study, as well as the validity and reliability of the research instrument.

3.4.1 Selection of the research instrument

A survey lends itself to exploratory or descriptive studies, and is primarily aimed at obtaining numerical data. A survey can be deductive, in order to test a hypothesis, or inductive, in order to determine the reasons for a phenomenon, as is the case in this study (Cooper & Emory, 1995:28; Mouton, 2001:152). *Questionnaires* are most often used as the research instrument during surveys (Saunders *et al.*, 2007:354).

Questionnaires may be administered either during face-to-face interviews, during telephonic interviews or by the respondents themselves, the latter being known as self-administered questionnaires (Leedy & Ormrod, 2005:184-185; Saunders *et al.*, 2007:356-357). As a result of the rugby unions being geographically dispersed, which ruled out face-to-face interviews, and the fact that a number of time constraints affected this study, which limited the potential for telephonic interviews, it was concluded that a *self-administered questionnaire* would be the most efficient method of data collection (Cooper & Emory, 1995:287).

There are several *advantages* to using questionnaires. Administering the questionnaire is relatively straightforward, as is the analysis of data. Questionnaires offer an efficient and cost-effective way of obtaining the required data. Arguably the most significant benefit of using a questionnaire is that it offers the respondent a large degree of anonymity (Cooper & Emory, 1995:287; Hofstee, 2006:133).

On the other hand, the use of questionnaires also has some *disadvantages*. The researcher is not able to interact with the respondents in order to clarify responses or ask more probing questions. Questionnaires are therefore limited in terms of the depth in which an issue may be explored and are restricted to a set format (Cooper & Emory, 1995:287; Hofstee, 2006:133). Questionnaires also tend to have a lower response rate than surveys conducted using interviews (Cooper & Emory, 1995:287).

The design of the questionnaire directly influences the response rate, as well as the reliability and validity of the data collected. A number of strategies are proposed to improve these aspects (Saunders *et al.*, 2007:356):

- The reason for the questionnaire should be explained in sufficient detail;

- Questions should be carefully designed;
- The layout of the questionnaire should be clear;
- The questionnaire should be pre-tested; and
- The process of administering the questionnaire should be well planned.

These factors were addressed during the design and pre-testing of the questionnaire (refer sections 3.5.2 and 3.5.3 respectively) and in the covering letter to the questionnaire (refer Appendix B).

3.4.2 Validity and reliability of the research instrument

The *internal validity* of the questionnaire refers to the capacity of the questionnaire to measure that which the researcher intends to measure (Cooper & Emory, 1995:148; Saunders *et al.*, 2007:366). Internal validity has a number of elements, namely, content, criterion and construct validity (Cooper & Emory, 1995:149-152; Leedy & Ormrod, 2005:92; Saunders *et al.*, 2007:366-367).

Content validity ensures that the questionnaire adequately addresses the research objectives and nothing more or less. It is essential that the researcher ensures that each question in the questionnaire serves a purpose in addressing the research objectives, and that it is not merely included to elicit 'interesting information'. Criterion, or predictive, validity concerns the ability to make accurate predictions based on the questions, as a result of correlations between two or more variables. Construct validity refers to the extent to which the questionnaire measures a characteristic which cannot be observed but must be surmised (Cooper & Emory, 1995:149-152; Leedy & Ormrod, 2005:92; Saunders *et al.*, 2007:366-367).

Reliability is concerned with the extent to which the questionnaire will lead to consistent results (Cooper & Emory, 1995:153; Saunders *et al.*, 2007:149, 367). A number of measures may be employed to ensure the reliability of the instrument, such as test re-test, where the questionnaire is administered twice and the results compared; internal consistency, where responses are correlated to answers to other questions; and alternative form, where the same question is asked more than once in different ways and the results compared (Cooper & Emory, 1995:155; Saunders *et al.*, 2007:367-368).

The validity of the questionnaire was confirmed by a review by the supervisors of the study and a research consultant to the Faculty of Economic and Management Sciences at the University of Pretoria. The reliability of the questionnaire administered to players was assured by pre-testing the questionnaire, by providing sufficient guidance for the completion of the questionnaire, as well as by reviewing the responses for consistency during the editing, coding and analysis of data.

3.5 DATA COLLECTION

This section covers the method of data collection, the design of the questionnaire, including the reasons for including specific questions and the use of different response categories, the pre-testing to which the questionnaire was subjected, the period during which the survey was conducted, and lastly, the realised sample size and number of usable questionnaires.

3.5.1 Method of data collection

Quantitative data refers to data which is collected and analysed numerically, while *qualitative data* is data which is collected and analysed non-numerically, for instance by using narrative (Saunders *et al.*, 2007:145).

To a certain extent, this study followed a *mixed approach*, as it is considered to contain elements of both quantitative and qualitative approaches (Leedy & Ormrod, 2005:96):

- The exploratory and descriptive nature of the study and the inductive approach are all elements of a qualitative approach; but
- Data was collected, analysed and reported using mostly numeric means, using a standardised instrument, pointing to a quantitative approach.

Despite the above, the study is deemed to be a *quantitative study*, as the focus during data collection was on quantitative measures. However, one open-ended question was included in the questionnaire, but this is not considered to detract from the overall quantitative approach to the study.

A factor which is to be considered during data collection is access to data, both physical and cognitive. *Physical access* refers to the process of gaining access to and obtaining consent from a 'gatekeeper' at the organisation which is to be involved in the study, as well as to individuals themselves. *Cognitive access* refers to the means of gaining access to valid and reliable data in order to address the research question(s) (Saunders *et al.*, 2007:164). Magee and Sugden (2002:423) comment on the threat a lack of access to players would have posed to their study, emphasising that the quality and success of the research is dependent on obtaining access.

Prior to approaching the rugby unions to obtain their consent and thereby access to the players, the South African Rugby Players Association (SARPA) was approached for its support of the study. This proved to be crucial in obtaining the consent of the unions. In addition, a comprehensive 'script' was developed, to be used when contact was made with the rugby unions. The rugby unions were given an overview of the background to the problem, the research question and objectives, the significance of the study, the research design and methodology and the delineation of the study. In addition, the unions had sight of the questionnaire prior to it being distributed to the players, to ensure that they were aware of the types of question being asked, and to demonstrate that no 'classified' information, such as details of remuneration, was being elicited.

Two points were raised during the discussions with the unions. Firstly, it was suggested that the questionnaire, which had been compiled in English, be translated into Afrikaans, to ensure that players could complete the questionnaire in a language they were most comfortable with. Secondly, a request was made that the unions not be identified by name during the analysis of the results. As a result, each of the unions was allocated a letter based on the order in which the questionnaires were returned, and they were identified using that letter during the analysis. The analysis therefore refers to Union A, Union B and so forth, rather than the names of the unions participating in the study.

As discussed in section 3.4.1, a self-administered questionnaire was chosen as the research instrument. The questionnaires were couriered or delivered to each of the top five South African rugby unions for distribution to players in the unions' senior teams. After completion, the questionnaires were collected from the players by the unions and returned to the researcher for analysis.

Owing to the fact that the questionnaire was self-administered, an effort was made to include as much guidance for respondents as considered necessary, both in the covering letter to the questionnaire and the questionnaire itself, to facilitate the collection of reliable data (refer Appendix B for the covering letter and Appendix C for the final questionnaire).

3.5.2 Design of the questionnaire

The concepts of measurement and measurement scales should be considered during the design of a questionnaire. *Measurement* is the process of “assigning numbers to empirical events in compliance with a set of rules” (Cooper & Emory, 1995:141). *Measurement scales* are the methods used to measure properties and the like (Cooper & Emory, 1995:142).

There are four types of measurement scale (Cooper & Emory, 1995:143-147; Leedy & Ormrod, 2005:254-255):

- *Nominal scales*: these use categories which are mutually exclusive and collectively exhaustive, but do not measure the quantity or degree of the item being measured.
- *Ordinal scales*: these contain characteristics of nominal scales, but involve some measure of order or degree, for instance Likert scales.
- *Interval scales*: these incorporate measures of the previous two scales, but include equal intervals without an absolute zero (for example a scale measuring temperature in degrees Celsius).
- *Ratio scales*: these are similar to interval scales, the only difference being the presence of an absolute zero (such as a scale measuring age).

A questionnaire may be composed of either open-ended or closed questions, or a combination of both. *Open-ended questions* are useful when a more detailed or specific answer is required (Cooper & Emory, 1995:312; Saunders *et al.* 2007:368-369). Questions 2, 3c, 9, 11 and 14 in the final questionnaire (refer Appendix C) are open-ended questions. During coding, the responses to Questions 2, 3c, 9 and 11 were coded into interval categories.

Closed questions are however considered preferable in questionnaires, as the responses are easier to code and analyse, and responses are less varied (Cooper & Emory, 1995:312). Two types of closed questions exist, namely dichotomous and multiple-choice questions. *Dichotomous questions* provide only two mutually exclusive options, for example a question relating to gender (Cooper & Emory, 1995:312). Questions 3a, 7 and 13 in the final questionnaire are dichotomous questions.

A *multiple-choice single response scale* is useful where more than two possible answers exist, but only one option should be selected. This type of scale should provide a number of collectively exhaustive, mutually exclusive options (Cooper & Emory, 1995:313; Saunders *et al.*, 2007:370). Questions 1, 3b, 8, 10 and 12 in the final questionnaire are examples of multiple-choice single-response questions using nominal scales.

Question 8 includes a 'neutral' option, in the form of 'maybe' as a response, as well as a 'no opinion' option, to allow for the fact that respondents may not have a strong opinion on the matter either way. Question 12 also includes a neutral option, as it was envisaged that players may not feel comfortable answering 'yes' to the question if they were considering playing overseas, even though their names were not requested.

There are mixed views about including a neutral or no opinion option in questionnaires. On the one hand, respondents may be drawn to the neutral option in order to avoid expressing an opinion, but on the other hand, not including a neutral option may force respondents to express a view when in fact they have no opinion one way or the other (Cooper & Emory, 1995:173; Leedy & Ormrod, 2005:186-187; Saunders *et al.*, 2007:373).

Question 4 in the final questionnaire, while containing many factors, is also a multiple-choice single-response question, utilising a Likert (ordinal) scale, as only one rating could be selected for each of the factors. Questions 5 and 6 in the final questionnaire may be classified as *multiple-choice multiple-response questions*, as the three most important factors had to be selected from the list provided in Question 4.

Question sequence is also important when designing a questionnaire. While respondents should be motivated to participate in the survey and their interest awoken early on, it is generally believed that sensitive or potentially threatening questions should not be

included at the beginning of the questionnaire, as respondents may decide not to continue with the questionnaire. In addition, questions should move from general to more specific, and from easy to more complex (Cooper & Emory, 1995:315-316; Saunders *et al.*, 2007:381).

On this basis, the questionnaire commenced with a number of simple demographic-type questions (Questions 1 to 3), before moving on to the questions regarding the factors which would influence the decision to move overseas or remain in South Africa (Questions 4 to 6). Questions requiring more thought, such as Questions 8, 11 and 14 (the open-ended question), and questions which could be construed as sensitive (Questions 7 and 12), were included in the latter half of the questionnaire. The more complex and sensitive questions were interspersed with further demographic-type questions (being Questions 9, 10 and 13) to soften the impact of the more complex and sensitive questions. The covering letter to the questionnaire (refer Appendix B) explained the aim and importance of the study, and was partly employed to awaken the respondents' interest and motivate them to take part in the study.

The questions included in the questionnaire, and the justification for their inclusion, are discussed below.

Question 1: Respondents had to indicate which South African rugby union they were currently playing for. The question was included to determine the representivity of the final sample, and to enable comparison of responses between the different rugby unions.

Question 2: Players were asked to indicate how long they had been playing for their current team. This was done to determine the experience of the players and, to a lesser extent, the intention was to establish whether length of time with a team played any role in the decision to play overseas.

Question 3: Players were asked whether they were currently contracted to an overseas club or had previously played for an overseas club. They also had to indicate the club and country in question, as well as the length of time they had spent with the club. This question was included to determine the extent of the problem and to enable comparison between players with and without international playing experience.

Question 4: Respondents were asked to rate the extent to which a number of factors would influence their decision to play for an overseas club or to remain in South Africa. This question directly addresses the first and second research objectives of the study. The factors included in the final questionnaire (refer Appendix C), with the justification for their inclusion based on a review of the literature, are set out in Table 1 below.

Table 1: Factors included in the questionnaire with the justification for inclusion

Factor included in the questionnaire	Justification for inclusion
Larger salary or other benefits payable by the overseas club	Financial benefits were noted as the primary driver in the decision to migrate, both in previous studies and the printed media (Beattie, 2006; Ben-Porat, 2002; Blitz, 2009a; Blitz, 2009b; Collins, 2000; Colquhoun, 2002; Cornelissen & Solberg, 2007; Cymrot & Dunlevy, 1987; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Ross & Dunn, 2007; Smith, 2004; Smith, 2006; Stead & Maguire, 2000; The Economist, 2005).
Opportunity to receive sponsorships or endorsements	Harmse and Borchardt (2009) commented on the fact that the opportunity to receive endorsements increases a player's salary and is linked to the previous factor.
Better long-term tax benefits	A number of studies found that taxation played a role in the migration decision (Ben-Porat, 2002; Ross & Dunn, 2007; Stead & Maguire, 2000).
Quota system in South African rugby	Both the Management Today Yearbook (2008) and The Economist (2005) have commented that quotas or affirmative action are partly responsible for South Africans moving overseas.
Personal security – the level or impact of crime in South Africa	Based on anecdotal evidence, and comments in The Economist (2005), it was considered possible that crime played a role in whether or not to leave South Africa.
Opportunity to play in the Super 14 franchise	The opportunity to play in the Super 14 competition has been noted as a reason for Australian players not moving overseas (Smith, 2006).
Current political situation in South Africa	This factor is similar to those dealing with the quota system and personal security (or the impact of crime).
Lack of development opportunities in South African rugby	Several studies noted that players migrate as a result of a lack of opportunities at home (Elliot & Maguire, 2008; Magee & Sugden, 2002; Sayers & Edwards, 2004; Stead & Maguire, 2000).

Factor included in the questionnaire	Justification for inclusion
Security of income – a guaranteed basic salary as opposed to a performance fee	Based on anecdotal evidence, players' earnings are dramatically reduced if they do not play and therefore do not earn match fees – this factor again relates to financial reasons and was included to determine the impact of this state of affairs.
Family responsibilities or the impact on family	The effect on family has been noted as a factor in the decision to migrate (Stead & Maguire, 2000; The Economist, 2005); loneliness and homesickness, being reasons for players to return home, are deemed to be related to family issues (Sayers & Edwards, 2004).
Opportunity to play for the Springboks	The impact on eligibility for national team selection has been noted as a factor in the decision of whether or not to play overseas (Collins, 2000; Smith, 2006; Smith, 2008).
Competitive salary being offered by the South African team (in order to retain you)	This factor, also related to financial benefits, was included to establish whether it could play a role in the retention of players, even where financial reasons were the primary motivation for migrating.
Opportunity to gain 'international experience' at club level or the challenge of playing in a different league	Several studies found that the opportunity to gain experience at a higher level was an important factor in the decision to migrate (Cornelissen & Solberg, 2007; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Stead & Maguire, 2000).
Opportunity to coach or be involved with rugby, but not as a player	This factor was included to determine whether there were other reasons related to rugby which may influence the decision to migrate or remain in South Africa.
Adaptation to the culture of another country	A number of studies found that the possibility of experiencing other cultures was a factor in the migration decision (Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b); others found that adapting or not to other cultures may influence the decision to return home (Maguire, 1994:459; Maguire & Pearton, 2000a:179; Maguire & Pearton, 2000b:762).
Other – please specify	Respondents were given the opportunity to indicate any other factors which may influence their decision to play overseas or remain in South Africa.

Question 5: Respondents were requested to rank the top three factors influencing the decision to play overseas. This question directly addresses the second research objective of the study.

Question 6: Respondents had to rank the top three factors affecting the decision to remain in South Africa. This question addresses the second research objective in the negative.

Question 7: Respondents had to indicate whether they had played for the Springboks in the past, again to establish experience, and in order to determine whether that was a factor in the decision to migrate. The question also links to Questions 4 and 8.

Question 8: Respondents had to indicate whether their decision to play overseas would be influenced by the possibility of only South African-based players being eligible for selection to the Springbok national team, so as to determine whether that factor played any role in the decision to play overseas.

Question 9: Respondents were requested to state their age in years. This was considered appropriate in order to determine whether age plays a role in the decision to play overseas.

Question 10: Respondents were asked to indicate their marital status in order to determine whether that may influence the decision to play overseas.

Question 11: Respondents had to indicate how many more years they expected to play rugby professionally. Similar to Questions 9 and 10, this question was included to determine whether expectations about their remaining playing career, and therefore potential for future professional earnings, influence the decision to play overseas.

Question 12: Players were requested to indicate whether they were considering moving overseas, partly to establish the extent of the problem.

Question 13: Respondents had to indicate whether they received any assistance in planning and managing their financial affairs, and from whom. This was done to determine the level of sophistication with which players manage their affairs and links to some extent to the importance of taxation as a factor in the decision to play overseas.

Question 14: This was an open-ended question. Respondents had to state the one thing that their current rugby union could do to retain them. This was done partly to corroborate the findings of the survey, as well as to be able to make recommendations to rugby unions about retaining players.

For Questions 2, 3c, 9 and 11, which required an answer in years, no categories were supplied, but respondents had to note their response. This enabled the calculation of minimum, maximum and mean values and other analyses of the raw data, which would not have been possible had categories been provided.

3.5.3 Pre-testing the questionnaire

Pre-testing a questionnaire is required in order to identify any potential weaknesses in the questionnaire, for instance where the meaning of questions may not be clear to respondents, response categories not being exhaustive or mutually exclusive or otherwise inadequate, where instructions are unclear or questions do not flow logically (Cooper & Emory, 1995:317).

The questionnaire was pre-tested by colleagues of the researcher, who acted as surrogate respondents. The surrogate respondents were asked to provide feedback on the potential of the aim of the study to generate sufficient interest in players to take part in the study, the instructions to and clarity of questions, including whether questions or factors could be interpreted in more than one way, the flow of the questionnaire and sequence of the questions, whether any of the questions were deemed potentially too sensitive or unnecessary, and finally, how long it took to complete the questionnaire (Cooper & Emory, 1995:319-321).

The questionnaire was also reviewed by the supervisors of the study and a research consultant to the Faculty of Economic and Management Sciences at the University of Pretoria, to determine whether the questionnaire meets the research objectives and to identify any other potential limitations of the questionnaire.

No pilot study was conducted, partly because of the unavailability of players, owing to the conclusion of the Super 14 contest during May 2009 and the British and Irish Lions tour to

South Africa during June 2009, and partly as a result of the fact that the questionnaire was considered to be straightforward enough to be understood by respondents. In addition, the questionnaire was translated into Afrikaans after being compiled in English, thereby ensuring that players would be able to complete the questionnaire in a language of their choice.

As a result of the pre-testing and other reviews, minor changes were made to the questionnaire. Refer to Appendix C for the English version of the final questionnaire administered to respondents, and to Appendix D for the Afrikaans version.

3.5.4 Period during which the survey was conducted

The timing of the survey was largely influenced by the Super 14 contest and other international fixtures. During April 2009, South African teams played most of their Super 14 games in Australia and New Zealand, rendering them inaccessible, and although games were mostly played in South Africa during May 2009, it was not considered appropriate to distribute the questionnaires at that time, owing to the conclusion of the Super 14 contest. The British and Irish Lions tour to South Africa during June 2009, in which the majority of the unions participating in the study were involved, meant that it was not possible to distribute the questionnaires to teams at that time. July 2009 was therefore deemed a suitable time for conducting the survey, as the individual unions' international fixtures had been concluded. The current Springbok team was engaged in the Tri-Nations series at the time and current Springboks therefore did not take part in the survey.

The survey was conducted during July 2009. Questionnaires were distributed to the unions on 13 July 2009 and all responses had to be returned by 22 July 2009, although a one-week extension was granted in most cases.

3.5.5 Realised sample size and number of usable questionnaires

A total of 90 questionnaires were returned, two of which were deemed to be invalid, as Question 4, which directly addresses the aim of the study, had not been completed. Therefore, a total of 88 valid responses were received, which resulted in a response rate of 44%, based on an estimated population of 200.

In addition, the decision to translate the questionnaire into Afrikaans was justified, as 44% of respondents completed the Afrikaans version of the questionnaire, while the English version was completed by 43% of respondents, with the remainder of respondents completing the questionnaire partly in English and partly in Afrikaans.

3.6 DATA ANALYSIS

This section focuses on the process of editing and coding the data obtained from the returned questionnaires and the method of analysing the data.

3.6.1 Editing and coding the data

Editing is defined as the process during which raw data is reviewed to identify errors and omissions, to correct these where possible and to ensure that minimum quality standards are adhered to. The purpose of editing is to ensure that data is complete, accurate and consistent, as well as to arrange data in such a way as to aid coding and analysis (Cooper & Emory, 1995:379).

Editing can either be done in the field or centrally (Cooper & Emory, 1995:380). *Field editing* would, for example, take place in the case where a questionnaire was administered during a face-to-face or telephonic interview, and the interviewer read through the questionnaire upon completion of the interview to ensure that all questions had been answered and all answers had been captured legibly and comprehensively (Cooper & Emory, 1995:380).

Central editing is done by the researcher, either in addition to or in the absence of field editing, to identify any remaining issues with the data (Cooper & Emory, 1995:380). Owing to the data being collected by way of a self-administered questionnaire, field editing was not required and data was only edited centrally, by reviewing the returned questionnaires for completeness and any obvious inconsistencies in the form of duplicate selections for a single-response question or conflicting answers (discussed in more detail below). Questionnaires ($n = 2$) in which Question 4 had not been answered were deemed to be invalid and were not included in the analysis.

Coding is the process of allocating numbers, letters or symbols to responses in order for the responses to be grouped into response categories for use during the analysis of the data (Cooper & Emory, 1995:381). During the design of the questionnaire, an effort was made to ensure that response categories would facilitate coding, by using exhaustive and mutually exclusive categories as far as possible.

The results of the open-ended question, additional factors identified by respondents in Question 4, as well as responses relating to experience, age and expected length of players' remaining rugby career, were analysed and grouped into categories to enable further analysis.

For responses relating to experience, age or expected remaining playing career, an answer containing months was rounded up to a full year. Where a range was supplied, for example in response to Questions 2 and 11, the upper end of the range was used for analysis – note that ranges supplied tended to be quite small, for example “5 to 6 years”, and the use of the upper limit in the analysis would arguably not greatly influence the findings.

When coding the responses to Questions 4, 5 and 6, the following ‘rules’ were established and applied:

- Where the response to Questions 5 or 6 contradicted the ranking of a factor in Question 4, the ranking in Question 4 was amended as follows:
 - ❖ Where the factor was ranked as the most important in Question 5, the ranking of that factor in Question 4 was amended to a 1.
 - ❖ Where the factor was ranked as the second or third most important in Question 5, the ranking in Question 4 was changed to a 2.
 - ❖ Where the factor was ranked as the most important in Question 6, the ranking of that factor in Question 4 was amended to a 5.
 - ❖ Where the factor was ranked as the second or third most important in Question 6, the ranking in Question 4 was changed to a 4.
- Where other rankings in Question 4 appeared to be illogical, these were not amended, other than as indicated above.

- Where the same responses were given for Question 6 as for Question 5, the responses were deemed to be invalid and a 'no response' used in the analysis, except where the response related to financial benefits, as it could either refer to larger salaries offered by overseas clubs, being a reason to migrate, or competitive salaries offered by local unions, being a reason to remain in South Africa.
- Where descriptive responses (rather than the corresponding number relating to the factor in Question 4) were supplied for Questions 5 or 6, and the description did not correspond exactly to the factors included in Question 4, the most closely related factor in Question 4 was determined and the number relating to that factor entered for analysis.

Other than as indicated above, no other changes were made to the data during coding or analysis.

3.6.2 Method of analysis

As indicated above, responses were coded into numerical data, and the numerical data for the sample overall was then analysed by the Faculty's research consultant using the Statistical Analysis Software (SAS) package (version 9.1.3). The results of the statistical analysis were provided in a report format, indicating the frequencies and percentages.

In addition to analysing the data over the entire sample of responses, data was also analysed per rugby union in order to compare responses between unions. This was done by the researcher using a spreadsheet.

3.7 VALIDITY AND LIMITATIONS OF DATA

Research findings will only be considered credible if they are based on valid and reliable data. *Validity* is described as "whether the findings are really about what they appear to be about" (Saunders *et al.*, 2007:150). Reliability was discussed in section 3.4.2. The threats to reliability and validity, and how these have been overcome, will be discussed below.

There are a number of threats to reliability (Saunders *et al.*, 2007:149-150), these being:

- *Participant error* refers to the fact that participants' responses may change depending on their state of mind, for example players may be more enthusiastic about leaving a team if it has suffered a long losing streak.
- *Participant bias* covers situations where participants respond in a way which they consider morally acceptable, or moderating their answers in instances where they assume that they might be prejudiced by their response. The latter factor was considered particularly relevant during this study, as players could be expected to regulate their answers if the rugby unions were to have access to the completed questionnaires. As a result, it was ensured that rugby unions would not have access to specific responses, but only to the summary of findings, especially as it related to their union specifically.
- *Observer error* occurs when the researcher asks respondents questions in different ways. The greater the degree of structure in the research instrument, the lower the risk of observer error. The risk of observer error in this study is considered to be negligible, as responses were obtained from a self-administered questionnaire.
- *Observer bias* depends on the researcher's interpretation of answers. The risk of observer bias is also considered negligible, owing to the structured format of the questionnaire, with only one open-ended question being included, and the fact that coding rules were applied consistently.

One of the threats to external validity is the lack of generalisability of the findings (Saunders *et al.*, 2007:151). However, as this was an exploratory study, the intention was not to generalise findings to other rugby teams, either in South Africa or in other countries, or to other sports disciplines.

3.8 ETHICAL CONSIDERATIONS

Research ethics "refers to the appropriateness of your behaviour in relation to the rights of those who become the subject of your work, or are affected by it" (Saunders *et al.*, 2007:178).

Research ethics should be borne in mind at each stage of the research process, from conception of the study through to reporting the findings, to ensure that the entire study is undertaken in a morally responsible way (Saunders *et al.*, 2007:178). Ethical

considerations are especially important when attempting to gain access to individuals and information, as individuals may not be forced or coerced into participating in a study (Saunders *et al.*, 2007:182). Factors which should be considered during data analysis and reporting are maintaining the anonymity of participants and the confidentiality of data, and ensuring that the researcher maintains objectivity while analysing data and reporting his or her findings (Saunders *et al.*, 2007:192).

There is general consensus that the first principle of research ethics is non-maleficence, or the *avoidance of harm* (Cooper & Emory, 1995:97; Leedy & Ormrod, 2005:101; Mouton, 2001:239; Saunders *et al.*, 2007:181). However, research ethics covers much more than not harming participants or ensuring their anonymity.

There are a number of general ethical considerations to be taken into account during the research process, that is, protection from harm, informed consent, right to privacy, honesty with professional colleagues and internal review boards (Leedy & Ormrod, 2005:101-103; Mouton, 2001:240-245). Professional ethics should also be considered (Hofstee, 2006:209-212; Leedy & Ormrod, 2005:102; Mouton, 2001:240-241). Each of these elements is discussed in more detail below.

Protection from harm: Participants in a study should not be subjected to either *physical or psychological harm*, for example by being exposed to undue stress or embarrassment (Leedy & Ormrod, 2005:101; Mouton, 2001:245). The potential ‘embarrassment factor’ of sensitive questions was specifically considered during pre-testing.

Informed consent: Participants should be made aware of the aim of a study, and should be given the *option of whether or not to participate* in the study. Even if they agree to participate, they should be given the *option to withdraw* from the study at any stage (Leedy & Ormrod, 2005:101). The following should be included in an informed consent form or ‘participant information sheet’ (Leedy & Ormrod, 2005:101-102; Mouton, 2001:244; Saunders *et al.*, 2007:185):

- The title and aim of the study;
- Who will be participating in the study;
- What would be required of respondents during participation in the study, including the investment of time involved;

- An indication of the target date for completion of participation in the study;
- Recognition of the fact that participation in the study is voluntary and that the participant may withdraw from the study at any stage;
- An undertaking that responses will remain anonymous;
- An indication of the potential risks and expected benefits associated with the study;
- Information on how the data will be utilised and where the findings will be published;
- An offer to share the findings of the study, if requested;
- The researcher's name and contact details; and
- An alternate contact with whom the participant can discuss any remaining concerns.

The items above were included in the covering letter accompanying the questionnaire (refer Appendix B). Consent was obtained from the rugby unions, authorising the participation of their players in the study. Although participants were not required to provide their name when completing the questionnaire, the questionnaire provided an option for respondents to indicate their consent to participate in the study by ticking a box at the beginning of the questionnaire. Where the box had not been ticked, consent was deemed to be implied by the return of a completed questionnaire, given that respondents had been provided with the necessary information on which to base consent.

Right to privacy: The right to privacy includes the *right to refuse* to respond to a questionnaire, or to refuse to answer particular questions (Mouton, 2001:243). Although there are fewer ethical issues to be considered in relation to self-administered questionnaires than, for instance, face-to-face or telephonic interviews, particular care should be taken to ensure the *confidentiality of data* and *anonymity of respondents* (Mouton, 2001:243-244; Saunders *et al.*, 2007:187-188). During the analysis of data and representation of research findings, care should be taken to ensure that responses cannot be connected to a particular respondent (Leedy & Ormrod, 2005:102). The participants' anonymity was guaranteed in the covering letter to the questionnaire, and that fact was explicitly pointed out to the rugby unions. In addition, respondents' names were not requested in the questionnaire.

A researcher has an *obligation to share data* with other researchers upon request, but the obligation to disclose should never override the participants' right to anonymity (Hofstee, 2006:211; Mouton, 2001:240).

Internal review boards: Permission for the study and *ethical clearance* were obtained from both the Research Committee of the Taxation Department and the Ethical and Postgraduate Committee of the Faculty of Economic and Management Sciences at the University of Pretoria.

Professional ethics: One of the principles involved in professional ethics is that the researcher should present his or her own work. While colleagues, supervisors, editors and the like may assist in the process, the final product should represent the *researcher's own work* (Hofstee, 2006:209-210). Another matter to consider is potential *falsification of data*. Although data obtained may be edited to some extent, this may never cross over into creating or changing data (Hofstee, 2006:211; Leedy & Ormrod, 2005:102; Mouton, 2001:240). The research report represents the researcher's own work and none of the data was changed in any way, save for minor changes required during editing and changes made during coding, as described in section 3.6.1.

Lastly, *plagiarism*, whether inadvertent or deliberate, should be avoided at all costs (Hofstee, 2006:211-212; Mouton, 2001:241). This was achieved by fully referencing and acknowledging all sources used during this study.

3.9 CONCLUSION

This chapter considered the research design and methodology employed in this study, the sample selected, the selection and design of the research instrument utilised, the process of data collection and analysis, the validity and limitations of data and a number of ethical considerations.

The following chapter discusses the results of the analysis of data and the subsequent findings.

CHAPTER 4: ANALYSIS OF RESULTS

4.1 INTRODUCTION

The aim of the study was firstly to determine the factors influencing the decision of players at the top five South African rugby unions to play overseas and secondly, to establish the relative importance of the different factors, specifically taxation, influencing the migration decision.

The research design and methodology applied in this study were discussed in the previous chapter, as well as the sample selected, the development of the research instrument used in the survey and the process of data collection and analysis, together with ethical considerations applicable to the research process.

The final questionnaire administered to players at the top five South African unions is set out in Appendix C. Question 12 established whether players were considering moving overseas. Question 4 focused on the relative importance of a number of factors, which were identified during the literature review, in the decision to play overseas, while Questions 5 and 6 determined the three most important factors affecting the decision to play overseas or to remain in South Africa respectively. Question 8 considered whether eligibility for national team selection may influence the decision to play overseas.

The remainder of the questions sought to obtain demographic information (Questions 1, 9, 10 and 11), information on player experience at provincial, national and international level (Questions 2, 3 and 7), and the level of sophistication with which players manage their financial affairs (Question 13). The questionnaire concluded with an open-ended question, to identify the one thing that, in the respondents' opinion, South African unions could do to retain players.

This chapter focuses on the results of the analysis of data and the subsequent findings. Data was analysed both at an aggregate level, as well as per union, to enable a comparison between unions where considered significant. The correlation between a number of demographic factors, that is, the respondents' age, expected remaining playing

career and marital status, and the intention to play overseas, was also determined, individually for each of the demographic characteristics, to evaluate whether any of these factors specifically influence the decision to play overseas.

As discussed in section 3.5.1, the various unions also indicated a preference for anonymity when the results of individual unions were discussed, in addition to the anonymity of players. As a result, each of the unions was allocated a letter based on the order in which the questionnaires were returned, and they were identified using that letter during the analysis. The analysis therefore refers to Union A, Union B and so forth, rather than the names of the unions participating in the study.

Given the fact that there were slight differences in the trends of responses from the different unions, it is considered appropriate to analyse responses at union level rather than at aggregate level only. As this is not a scientific study, it is deemed acceptable to refer to the respective unions using a pseudonym. In addition, there is justification in the academic literature for using pseudonyms to ensure anonymity of respondents (see Stead & Maguire, 2000).

4.2 ANALYSIS OF DEMOGRAPHIC INFORMATION

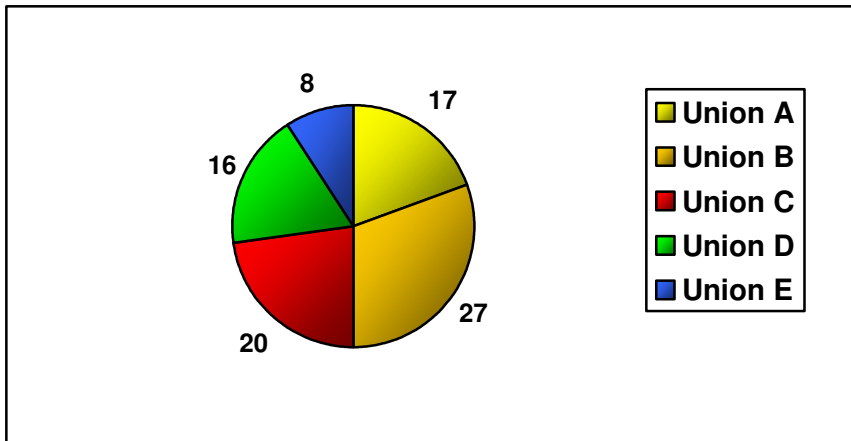
A total of 90 questionnaires were returned, two of which were deemed to be invalid, as Question 4, which directly addresses the aim of the study, had not been completed. Therefore, a total of 88 valid questionnaires were returned. Based on an estimated population of 200, at an average of 40 players per squad of each of the five unions participating in the study, this resulted in a response rate of 44%. This compares favourably with the response rate of 43% achieved by Stead and Maguire (2000:38) in a similar study, using interviews and questionnaires, of migration by Nordic/Scandinavian football players to English leagues.

This section deals with the analysis of demographic information supplied by the respondents, as it relates to age, marital status and expectations regarding the respondents' remaining rugby playing career.

4.2.1 Breakdown of South African rugby unions participating in the study

In Question 1, respondents had to indicate which South African rugby union they were currently playing for. The question was answered by all 88 respondents to the study, and the breakdown per union is indicated in [Figure 5](#) below.

Figure 5: Number of responses per union (n = 88)



Based on an average squad of 40 players, the response rate ranged from as low as 20% for Union E to as high as 67.5% for Union B, while the response rates for Unions A, C and D were nearer the overall rate of 44%.

4.2.2 Analysis of respondents' age

Question 9 required respondents to state their age in years. Responses were classified into interval categories and the minimum, maximum, median and mean values calculated based on the original data, the results of which are set out in [Table 2](#) below. Throughout the chapter, the 'Overall' column refers to the results as determined for the sample as a whole.

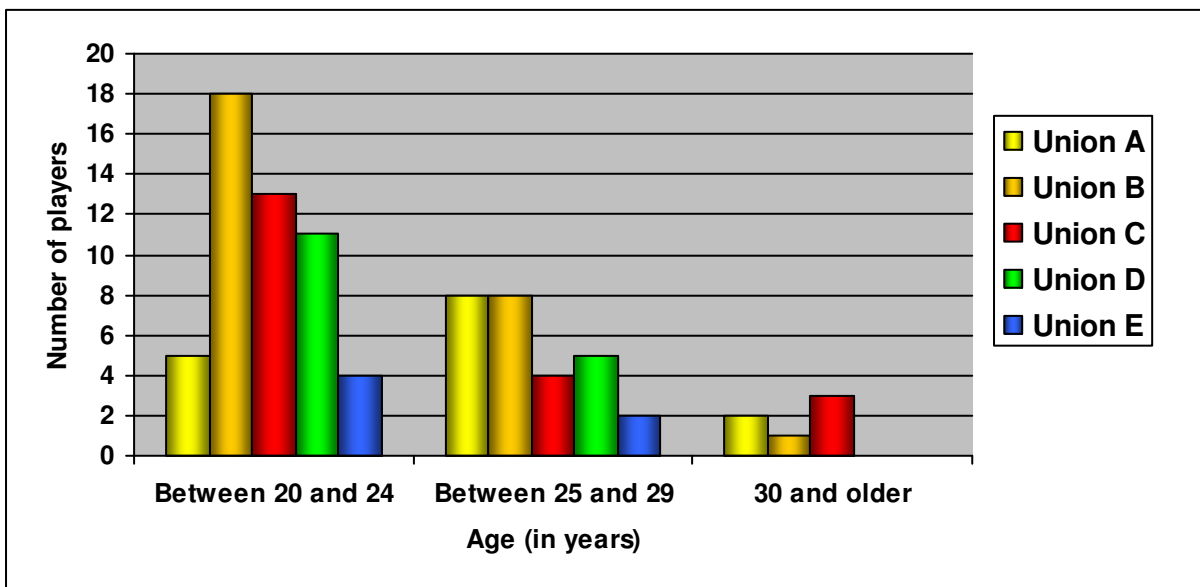
Table 2: Minimum, maximum, mean and median age (n = 84)

Age (years)	Union A	Union B	Union C	Union D	Union E	Overall
Minimum value	20	20	20	20	22	20
Maximum value	30	30	34	27	26	34
Mean value	25.33	23.85	24.60	23.44	24	24.23
Median value	26	24	23.5	23.5	24	24
Standard deviation						3.01
n	15	27	20	16	6	84

In all cases, the mean and median values are not appreciably different, indicating the absence of a large number of outliers. From the responses to this question, it would appear that the players in Union A are on average slightly older than those of the other unions, although the oldest player in the sample came from Union C.

Figure 6 below shows the breakdown of players' age, per union and per age category. The relationship between players' age and the intention to play overseas is set out in section 4.7.

Figure 6: Analysis of age of players per union (n = 84)

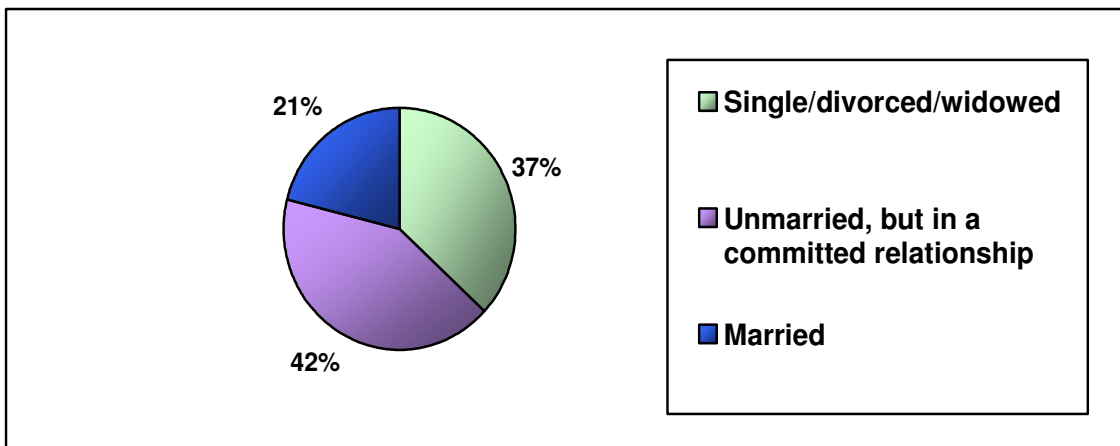


The highest number of responses for all unions, except Union A, came from the age category of 20 to 24 years, which is considered consistent with the higher average age of the respondents from Union A. Unions D and E had no respondents of 30 years or older.

4.2.3 Analysis of marital status

In Question 10, respondents were asked to indicate their marital status in order to determine whether that may influence the decision to play overseas. The overall results are set out in Figure 7 below, while the correlation between marital status and the intention to play overseas is discussed in section 4.7.

Figure 7: Analysis of marital status (n = 85)

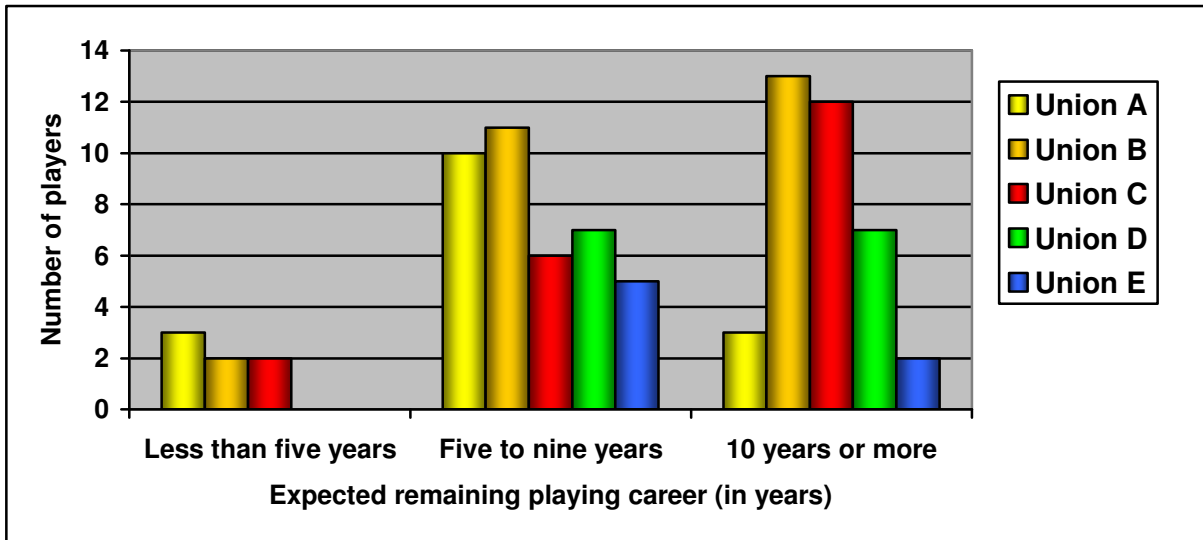


Although only 21% of the respondents indicated that they were married, the percentage of those who may be deemed to have a partner to consider in the decision to play overseas equates to 63% if one includes those respondents who indicated that they are unmarried, but in a committed relationship. The impact of family responsibilities on the migration decision is further discussed in section 4.4.2.

4.2.4 Expectations regarding remaining rugby playing career

Question 11 requested respondents to indicate how many more years they expected to play rugby professionally. The question was included to determine whether expectations about their remaining playing career, and therefore potential for future professional earnings, influence the decision to play overseas. Where a range was supplied, the upper end of the range was used for analysis. Responses were again classified into categories and the results per union and category are set out in [Figure 8](#) below. The relationship between the expected remaining playing career and the intention to play overseas is analysed in section 4.7.

Figure 8: Expected remaining playing career per union (n = 83)



Based on the responses to Questions 9 and 11, the age at which a respondent expected his career to terminate was calculated. For both the expected remaining rugby playing career and the expected age at the end of the respondent’s career, the minimum, maximum, median and mean values were calculated based on the uncategorised data. The results per union and overall are set out in Table 3 below.

Table 3: Analysis of years remaining in career and expected age at the end of career per union (n = 83 and n = 81 respectively)

	Union A	Union B	Union C	Union D	Union E	Overall
Remaining career (years)						
Minimum value	4	3	2	5	5	2
Maximum value	13	12	15	14	10	15
Mean value	6.56	8.27	8.70	8.43	7.29	7.99
Median value	5.5	9.5	10	9	6	8
Standard deviation						2.77
n	16	26	20	14	7	83
Expected age at the end of career (years)						
Minimum value	29	28	30	29	30	28
Maximum value	35	36	36	36	33	36
Mean value	31.87	32.19	33.30	31.93	31.50	32.31
Standard deviation						1.81
n	15	26	20	14	6	81

The majority of respondents (n = 39) expected to be able to play rugby professionally for another five to nine years, while a substantial number (n = 37) expected to play professionally for another 10 years or more. The expected remaining playing career of the

sample as a whole is approximately eight years, but is slightly lower for respondents from Union A, which is considered consistent with the higher average age of those respondents. The average age at which respondents expect their careers to end is approximately 32 years. This supports the findings in the academic literature that a professional career in sport tends to be comparatively short (Magee & Sugden, 2002; Ross & Dunn, 2007; Sayers & Edwards, 2004).

4.3 ANALYSIS OF PLAYER EXPERIENCE AT VARIOUS LEVELS

This section analyses the playing experience of respondents at provincial, national and international level.

4.3.1 Experience with current provincial team

In response to Question 2, players had to indicate how long they had been playing for their current provincial team, in order to assess experience at provincial level. Answers containing months were rounded up to a full year, while the upper end of the range was used for analysis where a range was supplied. Responses were classified into categories and the minimum, maximum, median and mean values calculated based on the raw data. The results per union are set out in Figure 9 and Table 4 below.

Figure 9: Length of time with union (n = 87)

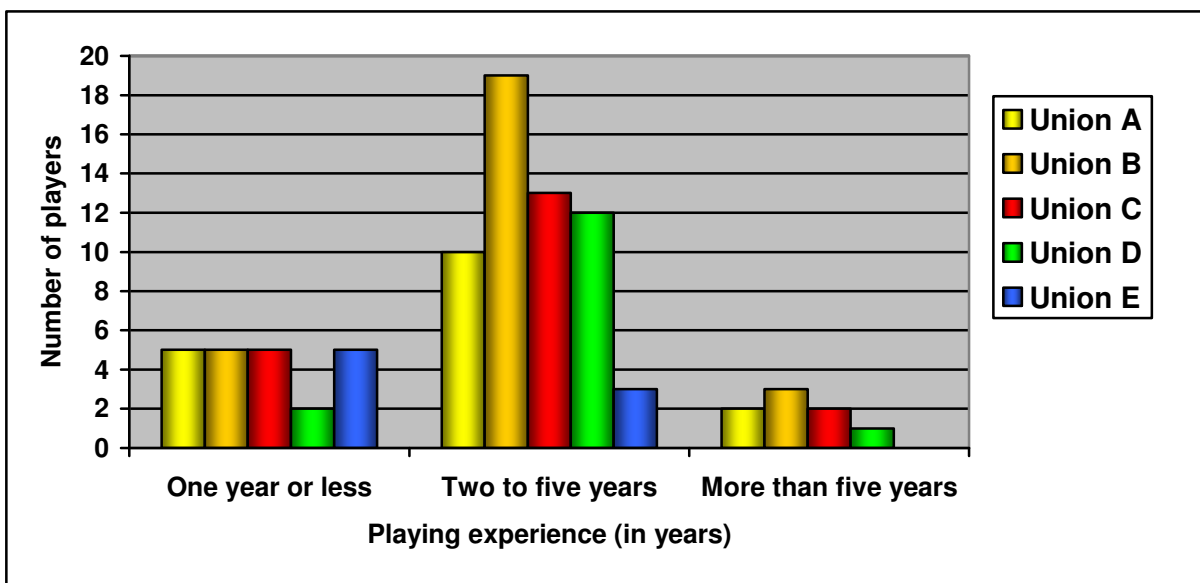


Table 4: Minimum, maximum and mean length of time with union (n = 87)

Length of time with union (years)	Union A	Union B	Union C	Union D	Union E	Overall
Minimum value	1	1	1	1	1	1
Maximum value	10	8	9	7	4	10
Mean value	3.06	3.56	3.60	3.60	1.63	3.30
Standard deviation						2.04
n	17	27	20	15	8	87

The majority of respondents (n = 57) have been with their unions for between two and five years, although five respondents from each union – with the exception of Union D, with two respondents – have been with their unions for a year or less. A small number of respondents (n = 8) have been with their unions for more than five years.

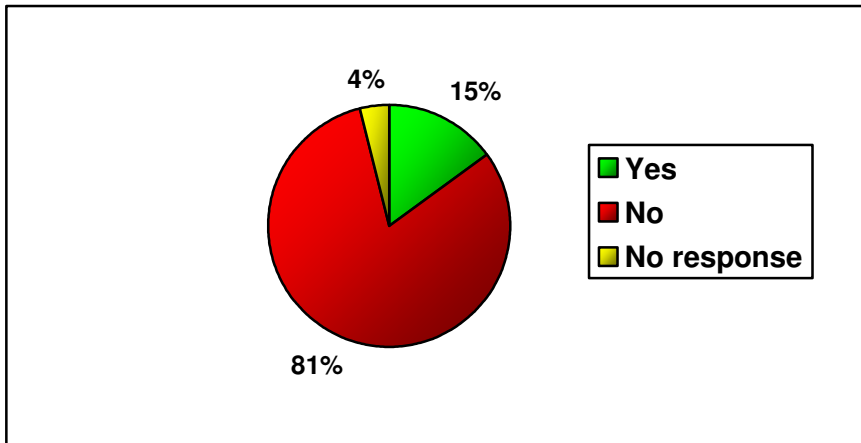
The average length of time with the current union is between three and four years, both at an aggregate level and for the individual unions. The only exception is Union E, where the average length of time with the union is less than two years, but it is estimated that that may have been influenced by the small number of respondents from that union.

Contrary to the original intention, the correlation between the length of time a player had been with the union and the intention to play overseas was not established.

4.3.2 Assessment of experience at Springbok (national) level

In Question 7, respondents were asked whether they had played for the Springbok national team in the past, so as to evaluate experience at national level. The question also links to Questions 4 and 8 (for further discussion, refer to sections 4.4.2 and 4.4.5 respectively). The overall response to the question is set out in Figure 10 below.

Figure 10: Response to whether players had played for the Springboks (n = 88)

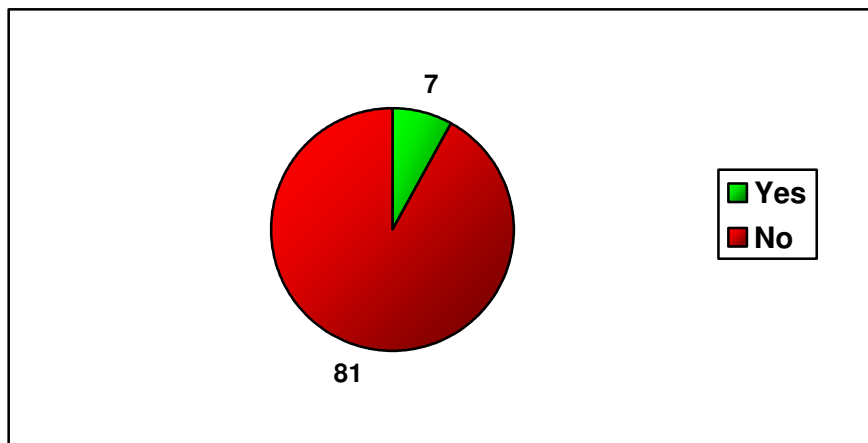


Only 15% of the respondents, representing all unions except Union E, indicated that they had previously played for the Springboks. Players in the current Springbok team, participating in the 2009 Tri-Nations series, were in a training camp at the time the survey was conducted, and therefore did not take part in the study. However, it is still gratifying that a number of players with previous Springbok experience participated in the study, as these players are considered to be more likely to be approached by overseas clubs, owing to their high profile and the fact that they are arguably considered to have more experience at international level.

4.3.3 Review of international playing experience

Question 3 was posed in three parts. In the first part, players were asked whether they were currently contracted to an overseas club or had previously played for an overseas club. Where they had played for an overseas club, they had to indicate the club and country in question in the second part, and, in the third part, the length of time they had spent with that club. Figure 11 below summarises the responses to the first part of the question.

Figure 11: Number of players current playing overseas (n = 88)



Seven players, representing all unions except Union D, had played for an overseas club in the past. Five of the players had played in France, and two in the United Kingdom (UK). The clubs in question were Ospreys and Newbury in the UK, and Aurillac and Toulon in France, while two of the players who had played in France did not indicate the club they had played for. This supports the data from SA Rugby (2009) considered in section 2.3.2, indicating that the majority of players move to either the UK or France when playing overseas.

Of the seven players with overseas experience, four had been with the overseas clubs for a year or less, with the remainder having between two and five years' experience with an overseas club. It is impossible to say whether those players with one year or less experience have only just started playing for an overseas club or whether they returned after only one season. As a result, no significant conclusions could be drawn from this analysis, although it may support the contention that players exploit the fact that the northern and southern hemispheres effectively provide two continuous seasons of play (Elliot & Maguire, 2008:484; Maguire, 1994:456; Maguire & Pearton, 2000a:177-178; Maguire & Pearton, 2000b:761).

This question was included to determine the extent of the problem and the intention was to perform a comparison between players with and without international playing experience. However, given the small number of respondents with international playing experience, it was not considered meaningful to perform further analysis based on the distinction between players with and without international experience.

4.4 ANALYSIS OF THE RELATIVE IMPORTANCE OF THE FACTORS INFLUENCING THE DECISION TO PLAY OVERSEAS

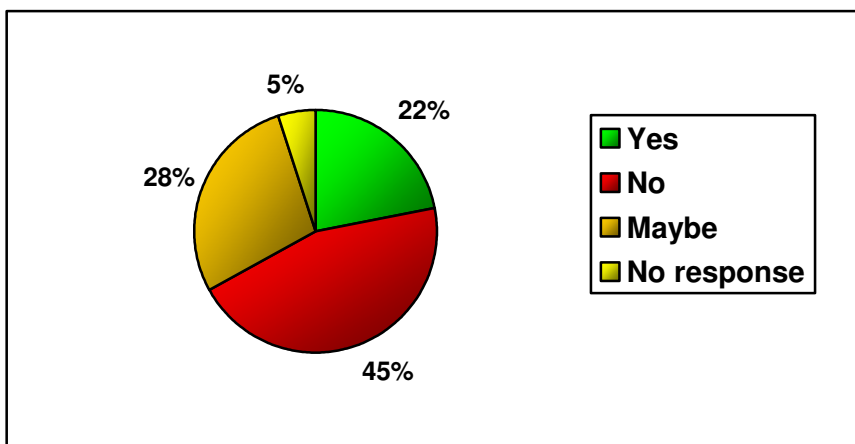
This section commences with an evaluation of the proportion of players who are currently considering playing overseas. Thereafter, the relative importance of a number of factors believed to influence the decision to play overseas or remain in South Africa, based on the literature review, is considered, as well as the most important factors affecting the decision either way. The section concludes by determining whether eligibility for national team selection may influence the decision to play overseas.

4.4.1 Assessment of intention to play overseas

Question 12 asked players to indicate whether they were considering leaving their current team to play overseas, partly to establish the extent of the problem. Their responses are set out in Figure 12 below.

The correlation between the respondents' age, expected remaining playing career and marital status and their intention to play overseas was also determined, individually for each of the demographic characteristics, to evaluate whether any of these factors specifically influence the decision to play overseas (refer to section 4.7 for further comments in this regard).

Figure 12: Analysis of intention to play overseas (n = 88)



When the responses are considered in isolation, the modal response (accounting for 45% of responses) was that respondents are not currently considering playing overseas.

However, given the sensitivity of the question, it could be argued that respondents may have answered 'maybe' instead of 'yes', even if they were currently considering playing overseas. When viewed from this perspective, 50% of respondents did not answer negatively, that is they answered either 'yes' or 'maybe' to the question, with 5% not responding.

It would appear therefore that there is a balance between those considering playing overseas at the time of the survey and those not considering the possibility, although the findings are considered to emphasise the severity of the problem.

It should be noted that a significantly higher proportion of respondents from Union A indicated that they are or may be considering an overseas move, which may be related to the fact that the respondents from that union are on average older than those from other unions, supporting the findings from previous studies that players tend to want to maximise their earnings towards the end of their career (Magee & Sugden, 2002; Ross & Dunn, 2007; Sayers & Edwards, 2004).

4.4.2 Relative importance of the factors influencing the decision to play overseas on a long-term basis

Question 4, which directly addressed both the first and second research objectives of the study, required respondents to rate the extent to which a number of factors would influence their decision to play for an overseas club on a long-term basis, or to remain in South Africa.

The question employed a Likert scale, with the questionnaire (refer Appendix C) providing the following key for the different rankings:

- A factor ranked **1** would definitely make a player move overseas;
- A factor ranked **2** might make a player move overseas;
- A factor ranked **3** would not influence a player's decision either way;
- A factor ranked **4** might make a player stay in South Africa; and
- A factor ranked **5** would definitely make a player stay in South Africa.

The responses were analysed in two ways. Firstly, the percentage of responses falling into each of the categories was compared on an overall basis for each of the factors, as set out in Table 5 below, with the modal responses being shaded. Secondly, the average ranking per factor was determined per union and for the sample overall, to determine whether each factor was more or less likely to influence the decision to play overseas. The results of that analysis are set out in Appendix E, and are further discussed in section 5.3.1.

Table 5: Breakdown of ranking of factors (n = 88 unless otherwise indicated)

Factor	1	2	3	4	5
Larger salary or other benefits payable by the overseas club	58%	41%	1%	-	-
Opportunity to receive sponsorships or endorsements	18%	38%	33%	8%	3%
Better long-term tax benefits	34%	31%	29%	3%	3%
Quota system in South African rugby	30%	35%	25%	3%	7%
Personal security – the level or impact of crime in South Africa	19%	43%	29%	3%	6%
Opportunity to play in the Super 14 franchise	6%	10%	23%	35%	26%
Current political situation in South Africa	9%	34%	40%	11%	6%
Lack of development opportunities in South African rugby	11%	31%	52%	3%	3%
Security of income – a guaranteed basic salary as opposed to a performance fee	26%	31%	30%	10%	3%
Family responsibilities or the impact on family (n = 87)	14%	17%	10%	49%	10%
Opportunity to play for the Springboks (n = 86)	7%	3%	13%	30%	47%
Competitive salary being offered by the South African team (in order to retain you)	9%	13%	4%	36%	38%
Opportunity to gain 'international experience' at club level or the challenge of playing in a different league	27%	44%	23%	6%	-
Opportunity to coach or be involved with rugby, but not as a player	7%	18%	43%	19%	13%
Adaptation to the culture of another country (n = 86)	10%	21%	45%	19%	5%

The factors included in the questionnaire were determined with reference to the literature review and the justification for the inclusion of each was discussed in more detail in section 3.5.2. In addition to the factors included in the questionnaire, which will be discussed in more detail below, respondents were given the opportunity to indicate any other factors which may influence their decision to play overseas or remain in South Africa. These will be collectively discussed under 'Other' below.

Larger salary or other benefits payable by the overseas club: The modal response for this factor was a ranking of 1, with 58% of responses, indicating that the factor would

definitely make respondents move overseas. In addition, 99% of respondents ranked the factor either a 1 or a 2 and, as a result, the findings would indicate that a larger salary is highly likely to influence the decision of players to play overseas.

The results of this study corroborate the findings in the academic literature and printed media, which found that financial reasons were the main factor in the migration decision (Beattie, 2006; Ben-Porat, 2002; Blitz, 2009a; Blitz, 2009b; Collins, 2000; Colquhoun, 2002; Cornelissen & Solberg, 2007; Cymrot & Dunlevy, 1987; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Ross & Dunn, 2007; Smith, 2004; Smith, 2006; Stead & Maguire, 2000; The Economist, 2005).

Opportunity to receive sponsorships or endorsements: The modal response for this factor was a ranking of 2, with 38% of responses, while 56% of respondents ranked the factor either a 1 or a 2, denoting the fact that the opportunity to receive sponsorships would likely influence the decision of players to play overseas. This is arguably linked to the previous factor, as it would also result in financial benefits.

Better long-term tax benefits: Of the sample overall, 65% of respondents ranked this factor either a 1 or a 2, with the modal response being a 1 ranking, with 34% of responses, indicating that better long-term tax benefits are likely to influence players' decision to migrate. These findings support those in the academic literature, where it was found that taxation plays a role in the migration decision (Ben-Porat, 2002; Ross & Dunn, 2007; Stead & Maguire, 2000).

Quota system in South African rugby: The modal response to the factor was a ranking of 2, with 35% of responses, while 65% of respondents ranked this factor either a 1 or a 2, leading to the conclusion that the quota system applied in South African rugby is likely to influence the decision of players to migrate, supporting the contention that rugby is negatively affected by political interference in the form of quotas (Management Today Yearbook, 2008:22).

However, 25% of respondents indicated that this factor would not influence their decision either way.

Personal security – the level or impact of crime in South Africa: A total of 62% of respondents ranked this factor either a 1 or a 2, with the modal response being a 2 ranking, with 43% of responses. This would suggest that the level or impact of crime in the country is likely to influence the decision of players to move overseas, which bears out statements in the printed media regarding the influence of crime on the decision of South Africans to leave the country (Colquhoun, 2002; The Economist, 2005).

It is worth noting that 29% of respondents indicated that this factor would not influence their decision either way.

Opportunity to play in the Super 14 franchise: The modal response for this factor was a ranking of 4, with 35% of responses, and 61% of respondents ranked this factor either a 4 or a 5. This would indicate that the opportunity to play in the Super 14 competition is likely to influence the decision of players to remain in South Africa, supporting the comments by Smith (2006). This factor arguably also relates to the quest for experience noted in the academic literature (Cornelissen & Solberg, 2007; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Stead & Maguire, 2000).

However, 23% of respondents indicated that this factor would not influence their decision either way, while 16% of players indicated that the factor would influence their decision to move overseas, which may suggest that players frustrated with not being selected for their union's Super 14 squad may decide to seek their fortunes elsewhere.

Current political situation in South Africa: The modal response for this factor was a 3 ranking, with 40% of responses, indicating that the current political situation is unlikely to affect the decision to migrate either way. It should however be noted that 34% of respondents ranked the factor a 2.

Lack of development opportunities in South African rugby: Although the modal response for this factor was a 3 ranking, with 52% of responses, a total of 42% of respondents ranked this factor either a 1 or a 2. The average ranking of 2.57 (refer Appendix E) would seem to suggest that the factor has the potential to influence the

decision of players to play overseas, supporting the findings in the academic and other literature (Elliot & Maguire, 2008; Magee & Sugden, 2002; Sayers & Edwards, 2004; Stead & Maguire, 2000; Tucker, 2002).

To a certain extent, this factor could be argued to be related to the quota system in South African rugby, should quotas result in talented players being denied the opportunity to develop or being selected at a higher level of play.

Security of income – a guaranteed basic salary as opposed to a performance fee:

The modal response to this factor was a ranking of 2, with 31% of responses, while 57% of respondents ranked the factor either a 1 or a 2, indicating that security of income would likely influence the decision of players to move overseas, which again links up with the financial reasons noted earlier. However, 30% of respondents indicated that this would not influence their decision either way, ranking the factor a 3.

Family responsibilities or the impact on family: The modal response to this factor was a ranking of 4, with 49% of responses, while 59% of respondents ranked the factor either a 4 or a 5, suggesting that players' consideration of family responsibilities and the impact on their family would likely influence the decision to remain in South Africa. To a certain extent, this supports Stead and Maguire's (2000:53) finding that partners and family were often closely involved in the migration decision, as well as the comments in *The Economist* (2005) that Francois Pienaar returned to South Africa partly for family reasons.

It was noted earlier that 63% of the respondents were either married or in a committed relationship, and therefore deemed to have a partner to consider in the decision of whether or not to migrate (refer section 4.2.3). This is deemed to have been corroborated by these results.

Opportunity to play for the Springboks: A total of 77% of players ranked this factor either a 4 or a 5, with the modal response being a 5 ranking, with 47% of responses, indicating that the opportunity to play for the Springboks is highly likely to influence the players' decision to remain in South Africa. This is deemed similar to the situation in Australia (Collins, 2000; Smith, 2006; Smith, 2008). This factor is also considered to relate to the quest for experience noted in the academic literature (Cornelissen & Solberg, 2007;

Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Stead & Maguire, 2000).

However, 10% of respondents indicated that this would influence their decision to play overseas, which may again indicate that players frustrated with not being selected for the Springboks may decide to play elsewhere.

Competitive salary being offered by the South African team (in order to retain players): Of the overall sample, 74% of respondents ranked this factor either a 4 or a 5, with the modal response being a ranking of 5, with 38% of responses, which suggests that a competitive salary being offered to players is highly likely to affect the decision to remain in South Africa.

This is deemed to support the earlier finding that financial reasons are an important consideration in the decision of whether to play overseas or not. As financial reasons have been noted as the most important reason for playing overseas, it would appear that respondents may be persuaded to remain in South Africa if their union were willing or able to offer them a comparable salary.

Opportunity to gain international experience at club level or the challenge of playing in a different league: Of the sample overall, 71% of respondents ranked this factor either a 1 or a 2, with the modal response being a 2 ranking, with 44% of responses, suggesting that the opportunity to gain international experience was highly likely to influence the decision of players to move overseas.

The results of this study confirm the findings of previous studies, noting that a desire for experience at a higher level was a strong motivation in the decision to migrate (Cornelissen & Solberg, 2007; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Stead & Maguire, 2000).

Opportunity to coach or be involved with rugby, but not as a player: The modal response to this factor was a ranking of 3, with 43% of responses, and no significant leaning towards playing overseas or remaining in South Africa when considering the other

rankings. This would tend to indicate that this factor is unlikely to affect the decision to migrate either way.

Adaptation to the culture of another country: The modal response to this factor was again a 3 ranking, with 45% of responses, and no significant predisposition towards leaving or remaining in South Africa noted in the remainder of responses, which may again indicate that the factor is unlikely to influence the migration decision either way. The academic literature also found that another country's culture could either be an attraction for those wishing to experience different cultures (Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b), typified as *nomadic cosmopolitans* (Magee & Sugden, 2002), or it could be seen as negative by those having difficulty adjusting to other cultures (Maguire, 1994; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b).

Other: The other factors noted by respondents were observed to influence the migration decision both positively and negatively. The responses were judgementally categorised as follows:

- Those related to providing *opportunities after* the end of the respondents' rugby playing careers, which were noted as likely to influence the decision to play overseas.
- A number of respondents noted the fact that they were nearing the *end of their career*, and indicated that this would influence the decision to play overseas, supporting the findings in the academic literature that players tend to want to maximise their earnings towards the end of their career (Magee & Sugden, 2002; Ross & Dunn, 2007; Sayers & Edwards, 2004).
- Quite a number of respondents noted factors *related to South Africa* as a reason to keep playing in South Africa, including the weather, culture and language, the quality of life and their love for the country, which validates comments in the printed media regarding the reasons for Australian players choosing to remain in Australia rather than move overseas (Hughes, 2006; Smith, 2004; Smith, 2006).

4.4.3 Three most important factors affecting the decision to play overseas

In Question 5, respondents were requested to rank the top three factors influencing the decision to play overseas. This question addressed the second research objective of the study.

For each of the factors, the number of times a respondent indicated that factor as being either the most important, second or third most important factor influencing his decision to play overseas was calculated, in order to arrive at the percentage of times a factor was selected as being one of the three most important. Factors were ranked in descending order based on the percentage calculated for the sample overall. The top five factors (based on their overall ranking) with their corresponding percentages are reflected in Table 6 below. The percentages per union for these factors are also shown, although the items noted may not be the top five factors for the individual unions.

Table 6: Percentage of times a factor was indicated as one of the three most important which would influence the decision to play overseas, excluding no responses (n = 222)

Factor	Union A	Union B	Union C	Union D	Union E	Overall
Larger salary or other benefits payable by the overseas club	35%	37%	26%	36%	35%	33%
Opportunity to gain 'international experience' at club level or the challenge of playing in a different league	8%	5%	10%	13%	35%	11%
Quota system in South African rugby	8%	14%	12%	5%	-	9%
Better long-term tax benefits	15%	5%	9%	8%	5%	8%
Personal security – the level or impact of crime in South Africa	10%	11%	7%	3%	-	7%
Lack of development opportunities in South African rugby	5%	3%	12%	10%	5%	7%
Percentage of responses accounted for above	81%	75%	76%	75%	80%	75%

As can be seen from the information in Table 6, the most important factor said to influence the decision to play overseas is a larger salary or other benefits payable by the overseas club, this being selected as one of the top three factors in 33% of instances. The factor also had the lowest average ranking at 1.43 (refer Appendix E), and 99% of respondents indicated that the factor would influence their decision to move overseas (refer section 4.4.2). This supports the findings in the academic literature that financial reasons are the primary motivator in the decision to migrate (Ben-Porat, 2002; Collins, 2000;

Cornelissen & Solberg, 2007; Cymrot & Dunlevy, 1987; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Ross & Dunn, 2007; Stead & Maguire, 2000).

The second most important factor identified in this study (11% of instances) is the opportunity to gain international experience at club level, corroborating the findings of previous studies that the quest for experience was a strong motivator in the decision to play overseas (Cornelissen & Solberg, 2007; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Stead & Maguire, 2000). The third most important factor (9% of instances) is the quota system in South African rugby.

The fourth most important factor (8% of instances) is better long-term tax benefits, which confirms previous findings that taxation plays a role in the decision to migrate (Ben-Porat, 2002; Ross & Dunn, 2007; Stead & Maguire, 2000). In combined fifth place are personal security, or the level or impact of crime in South Africa (7% of instances), and the lack of development opportunities in South African rugby (7% of instances); the latter was also noted in the academic literature as a factor in the migration decision (Elliot & Maguire, 2008; Magee & Sugden, 2002; Sayers & Edwards, 2004; Stead & Maguire, 2000).

4.4.4 Three most important factors affecting the decision to remain in South Africa

Question 6 required respondents to rank the top three factors affecting the decision to remain in South Africa. This question addressed the second research objective in the negative.

For each of the factors, the number of times a respondent noted that factor as either the most important, second or third most important factor influencing his decision to remain in South Africa was calculated, to determine the percentage of times a factor was selected as being one of the three most important. Factors were again ranked in descending order based on the percentage calculated for the sample overall. The top five factors (based on their overall ranking) with their corresponding percentages are reflected in Table 7 below. The percentages per union are also shown for these factors, although the items noted may not be the top five factors for the individual unions.

Table 7: Percentage of times a factor was indicated as one of the three most important which would influence the decision to remain in South Africa, excluding no responses (n = 163)

Factor	Union A	Union B	Union C	Union D	Union E	Overall
Opportunity to play for the Springboks	29%	27%	33%	19%	25%	27%
Competitive salary being offered by the South African team (in order to retain you)	21%	18%	19%	28%	-	20%
Family responsibilities or the impact on family	18%	25%	11%	3%	25%	16%
Opportunity to play in the Super 14 franchise	21%	11%	11%	17%	-	13%
Other – related to South Africa	4%	11%	11%	-	13%	7%
Percentage of responses accounted for above	93%	92%	85%	67%	63%	83%

Based on the information in Table 7, the most important factor influencing the decision to remain in South Africa is the opportunity to play for the Springboks, that being selected as one of the top three factors in 27% of instances. This arguably links to the quest for experience noted in previous studies (Cornelissen & Solberg, 2007; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Stead & Maguire, 2000).

The second most important factor identified in this study (20% of instances) is a competitive salary being offered by the unions in order to retain players, which may be considered to be similar to the most important factor in the previous question. In other words, although money is the most important factor in the decision to migrate, the decision may be reversed if the South African union offers a comparable salary. The third most important factor (16% of instances) is players' responsibility towards their families and the impact a decision to move overseas would have on their families, confirming earlier findings that a player's family is involved in the decision to migrate (Stead & Maguire, 2000:53).

The fourth most important factor (13% of instances) is the opportunity to play in the Super 14 franchise, which arguably also demonstrates a desire to play at the highest level, as noted in previous studies (Cornelissen & Solberg, 2007; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Stead & Maguire, 2000). In fifth place (with 7% of instances) are a number of other

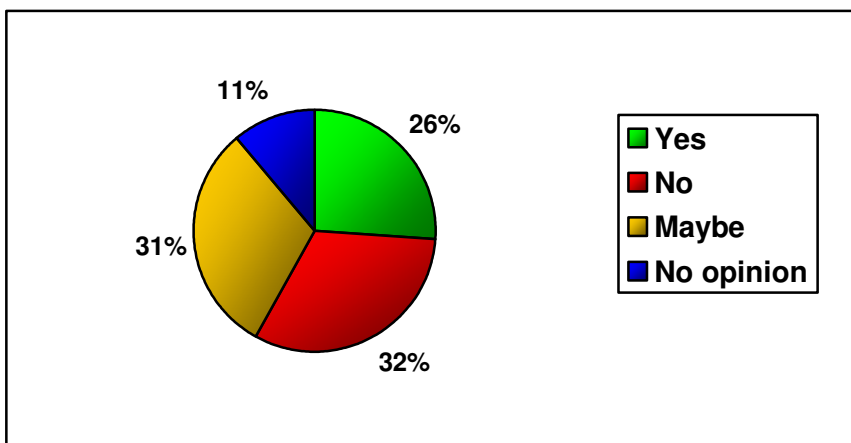
factors, all centring around South Africa, for example the weather, culture, language, quality of life and respondents' love for the country.

4.4.5 Impact of eligibility for national team selection on the decision to play overseas

In Question 8, respondents had to indicate whether their decision to play overseas would be influenced by the possibility of only South African-based players being eligible for the Springbok national team, so as to determine whether that would play any role in the decision to play overseas.

It was pointed out in the introduction to the study that the South African Rugby Union (SARU) had decided at one time not to consider players who were playing overseas for selection to the Springbok national team, although this decision was later withdrawn (refer section 1.1). It was considered worthwhile to assess whether playing in South Africa as a requirement for eligibility for Springbok selection may influence the decision to play overseas, should SARU revert to its earlier position. The overall responses to the question are depicted in Figure 13 below.

Figure 13: Response to whether playing in South Africa as requirement for eligibility for Springbok selection would influence the decision to stay in South Africa (n = 84)



On the face of it, it would appear that the decision of the largest number of respondents (the modal response eliciting 32% of responses) would not be influenced by the requirement to play in South Africa. However, again considering that the question may be deemed potentially sensitive, it could be argued that respondents may have answered

‘maybe’ instead of ‘no’, so as not to ‘burn their bridges’, so to speak. When viewed from this perspective, 63% of respondents did not answer positively, in that they answered either ‘no’ or ‘maybe’ to the question, with 11% not responding, even though the opportunity to play for the Springboks was found to be the most important reason for remaining in South Africa.

It would appear therefore that playing in South Africa as a prerequisite for selection to the Springbok national team would not tend to influence respondents’ decision to play overseas, thus if SARU were to revert to its earlier position of not considering overseas players for Springbok selection, it would be unlikely stop the outflow of players.

4.5 ASSESSMENT OF THE LEVEL OF SOPHISTICATION IN MANAGING OF RESPONDENTS’ FINANCIAL AFFAIRS

In Question 13, respondents had to indicate whether they received any assistance in planning and managing their financial affairs, and from whom. This was done to determine the level of sophistication with which players manage their affairs, and links up to some extent with the importance of taxation as a factor in the decision to play overseas.

Question 13 listed a number of different parties who may potentially advise players with respect to their financial affairs, and players had to indicate with a ‘yes’ or ‘no’ whether they received assistance from these parties. Table 8 below sets out the percentage of respondents indicating that they received assistance from each of the different parties. The modal responses have been shaded.

Table 8: Percentage of players who answered ‘yes’ relating to assistance by various advisors (n = 84 unless otherwise indicated)

Assisted by	Union A	Union B	Union C	Union D	Union E	Overall
Financial advisor	73%	50%	55%	63%	14%	55%
Tax advisor	53%	42%	45%	44%	43%	45%
Accountant	20%	23%	20%	19%	14%	20%
Lawyer (n = 83)	33%	20%	30%	13%	29%	24%
Agent	80%	62%	60%	75%	86%	69%

Respondents were also given the option to indicate if they received assistance from any other parties. Two players (from Union B) indicated that they were assisted by family members.

A large number of respondents indicated that they were assisted by their agents in managing their financial affairs, with 69% overall responding positively. In addition, a surprising number of respondents indicated that they were assisted by financial and tax advisors, at 55% and 45% respectively overall, whereas accountants and lawyers were used to a lesser degree, at 20% and 24% respectively overall.

It would therefore appear from this study that players display a surprisingly high level of sophistication with regard to managing their financial affairs, which would support the finding that matters like taxation, as evidenced by the responses to Questions 4 and 5 (refer sections 4.4.2 and 4.4.3 respectively), are considered when making decisions as to where to ply their trade.

4.6 ANALYSIS OF RESPONSES TO THE OPEN-ENDED QUESTION

Question 14 was an open-ended question. Respondents had to state one thing which their current rugby union could do to retain them, so as to corroborate earlier findings of the study and, partly, to assist in making recommendations at the conclusion of the research.

Of the 88 valid questionnaires returned, Question 14 was completed in 67 instances, with 21 respondents choosing not to answer the question. The responses were captured and judgementally analysed according to themes, with more than one being selected where a respondent mentioned more than one item in his answer. The following themes were developed:

- *Increased financial benefits* focuses mainly on better remuneration, but included other financial benefits, such as fringe benefits and sponsorships.
- *Game time and other opportunities* includes comments relating to increased game time and opportunities to play.
- *Relationship with the union* encompasses factors such as honesty, trust, loyalty, belief in the players, team culture and structures.

- *Other* includes any remaining items mentioned which did not fit into one of the abovementioned categories, for instance assistance with securing a future after the end of their careers.

Appendix F contains the complete list of responses, while [Table 9](#) below sets out the percentage of responses according to the themes developed. The modal responses have been shaded.

Table 9: Analysis of responses to the open-ended question categorised into themes (n = 67)

Theme	Union A	Union B	Union C	Union D	Union E	Overall
Increased financial benefits	77%	50%	29%	36%	29%	46%
Game time and other opportunities	15%	25%	18%	50%	42%	28%
Relationship with the union	8%	21%	41%	7%	29%	21%
Other	-	4%	12%	7%	-	5%
n	12	21	16	12	6	67

While increased financial benefits were identified as the most important change that could be implemented by unions in order to retain players, with 46% of responses overall, it was identified as the most important area of concern by only two of the individual unions' respondents, being Union A and Union B, with 77% and 50% of responses respectively.

Players from Union C noted the relationship with the union as the most important area requiring attention, at 41% of responses, while respondents from Union D and Union E indicated game time and other opportunities as the most important area of concern, with 50% and 43% of responses respectively. However, it should be noted that, for all three of these unions, increased financial benefits was identified as the second most important retention strategy.

The response to the open-ended question supports the results from Questions 4, 5 and 6 (refer sections 4.4.2, 4.4.3 and 4.4.4 respectively), which found that financial benefits are the most important factor influencing the decision to play overseas, once again corroborating the findings of previous research, which noted financial reasons as the main factor in the decision to migrate (Ben-Porat, 2002; Collins, 2000; Cornelissen & Solberg, 2007; Cymrot & Dunlevy, 1987; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire &

Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Ross & Dunn, 2007; Stead & Maguire, 2000).

The results of this study indicate that respondents may be persuaded to remain in South Africa if their union were willing or able to offer them a comparable salary, with a competitive salary offered by the union also being noted as the second most important factor influencing the decision to remain in South Africa.

4.7 CORRELATION BETWEEN A NUMBER OF DEMOGRAPHIC FACTORS AND THE INTENTION TO PLAY OVERSEAS

The correlation between the respondents' age, expected remaining playing career and marital status and the intention to play overseas was determined, individually for each of the demographic characteristics, in order to evaluate whether any of these factors specifically influence the decision to play overseas.

In order to test whether any relationship existed between the different variables mentioned above, a chi-square test was performed, with a *p*-value being determined. The *p*-value was then compared to the level of significance (or alpha) (Cooper & Emory, 1995:441). In this case, where the *p*-value was less than 0.05, the relationship between the variables was deemed to be significant (at the 95% level of confidence).

In order to determine the correlation between marital status and the intention to play overseas, a *chi-square test* was performed on the responses to Question 10 (marital status) and Question 12 (intention to play overseas). The results are set out in Table 10 below.

Table 10: Correlation between marital status and the intention to play overseas (n = 83)

Marital status	Yes (frequency and column percentage)	No (frequency and column percentage)	Maybe (frequency and column percentage)	Total (frequency and column percentage)
Single / divorced / widowed	7 (22.58%)	16 (51.61%)	8 (25.81%)	31 (100%)
Unmarried, but in a committed relationship	3 (8.57%)	19 (54.29%)	13 (37.14%)	35 (100%)
Married	8 (47.06%)	5 (29.41%)	4 (23.53%)	17 (100%)
Total	18 (21.69%)	40 (48.19%)	25 (30.12%)	83 (100%)

The p -value of 0.0337 indicates that there is a relationship between marital status and the intention to play overseas at the 95% level of confidence.

Based on the results of the test, as set out in [Table 10](#) above, those respondents who had indicated that they are married are more likely to migrate than those who are single or unmarried, but in a committed relationship. These results contradict the earlier findings, which indicated that players' consideration of family responsibilities and the impact on their family would likely influence the decision to remain in South Africa (refer sections 4.4.2 and 4.4.4). This may warrant further investigation.

It should, however, be remembered that a correlation between two factors does not necessarily indicate a causal relationship (Leedy & Ormrod, 2005:267). The correlation could, hypothetically, be due to the fact that married players are generally older, with age being the cause of the correlation, rather than marital status.

In order to determine the correlation between both age and expected remaining playing career and the intention to play overseas, and owing to the fact that the sample is relatively small and not normally distributed, a *Kruskal-Wallis one-way analysis of variance test* was performed on the responses to Question 9 (age), Question 11 (expected remaining playing career) and Question 12 (intention to play overseas). The results are set out in [Table 11](#) below.

Table 11: Correlation between age and expected remaining playing career and the intention to play overseas (n = 82)

Independent variable	Yes	No	Maybe
Age (years)			
Mean value	25.28 ^a	23.56 ^b	24.68 ^{ab}
Standard deviation	2.97	3.31	2.38
n	18	39	25
Expected remaining career (years)			
Mean value	7.74 ^{ab}	8.79 ^a	7.00 ^b
Standard deviation	2.75	2.89	2.38
n	19	38	25

The p -value for the relationship between age and the intention to play overseas was 0.0361, indicating a relationship between the two variables at the 95% level of confidence.

Upon further analysis of the information represented in Table 11 above, the relationship was found to be significantly different at the 10% level of significance for those responding 'yes' and 'no', indicating that players who intend playing overseas are significantly older than those not considering migrating.

The *p*-value for the relationship between expected remaining playing career and the intention to play overseas was 0.0295, indicating a relationship between the two variables at the 95% level of confidence.

Upon further consideration of the information contained in Table 11 above, the relationship was noted to be significantly different at the 5% level of significance for those responding 'no' and 'maybe', indicating that players who may be considering playing overseas have a significantly shorter expectation of their remaining playing career than those who are not considering a move overseas.

The results of the analysis of the correlation between age, expected remaining playing career and intention to play overseas supports the findings in the literature, that is, that players tend to consider migration as a means of maximising their earnings towards the end of their career (Magee & Sugden, 2002; Ross & Dunn, 2007; Sayers & Edwards, 2004).

4.8 COMPARISON OF RESPONSES BETWEEN UNIONS

Where considered meaningful, responses were compared between the unions, and the findings are noted in the discussions throughout the chapter.

4.9 CONCLUSION

This chapter focused on the analysis of the responses to the returned questionnaires, considering demographic information, player experience, the importance of factors influencing the decision to play overseas, the level of sophistication with which players manage their financial affairs, the responses to the open-ended question and the correlation between certain demographic factors and the intention to play overseas.

The three most important factors noted by respondents in the decision to migrate were a larger salary or other benefits payable by the overseas club, the opportunity to gain international experience at club level or the challenge of playing in a different league, and the quota system in South African rugby. The three most important factors identified by respondents in the decision to remain in South Africa were the opportunity to play for the Springboks, a competitive salary being offered by the South African team (in order to retain players), and family responsibilities or the impact on family.

The results of this study indicate that, while financial reasons are the most important factor influencing the decision to play overseas, taxation is likely to influence the decision of players to move overseas, as it was noted as the fourth most important factor influencing the decision.

Based on the responses to the open-ended question, it is recommended that unions apply a multifaceted approach in order to retain players, focusing on increased financial benefits, game time and other opportunities, as well as improving the relationship between the unions and the players, although individual unions may need to focus more on certain areas than on others.

The final chapter highlights significant findings resulting from the research, considers the contribution and limitations of the study and suggests areas for future research.

CHAPTER 5: CONCLUSIONS AND IMPLICATIONS

5.1 INTRODUCTION

This study set out firstly to determine the factors influencing the decision of players at the top five South African rugby unions to play overseas and secondly, to establish the relative importance of the different factors, specifically taxation, influencing the migration decision.

The previous chapter focused on the analysis of the responses to the returned questionnaires, as it pertained to demographic information, player experience, the importance of factors influencing the decision to players overseas, the level of sophistication with which players manage their financial affairs, and the responses to the open-ended question. The correlation between certain demographic factors and the intention to play overseas was also determined. The chapter further considered the findings flowing from the analysis, including the link to the theoretical base established in Chapter 2.

After a review of the recent literature (being literature which was published since the initial literature review was performed), this final chapter seeks to summarise the findings. In addition, the contribution and limitations of the study are considered, followed by suggestions for future research.

5.2 REVIEW OF RECENT LITERATURE

No academic literature related to the topic was noted since the initial literature review was performed, although certain comments in the printed media are deemed relevant.

It has been confirmed that Francois Steyn from the Natal Sharks will be joining Racing Metro in France, partly to escape the media scrutiny to which he is subjected in South Africa, and partly for the opportunity to play overseas under the supervision of Andrew Mehrtens, former All Black flyhalf (Jordaan, 2009). The reasons noted support the findings in the previous chapter, given that Steyn is moving for the challenge of playing in an overseas league, which was noted by respondents to the survey as the second most

important reason to migrate, which would place him into the *ambitionist* category of the typology discussed in section 2.4.1. The attempt to evade media scrutiny would fit into the *expelled* category, confirming the view of Magee and Sugden (2002) and Maguire (2004) that the categories are not mutually exclusive and may overlap.

The Springbok centre, Jean de Villiers, is rumoured to be negotiating with Munster in Ireland regarding a move to the club, while he is also said to have received an offer from a French club. This is in addition to speculation that Jaque Fourie, another Springbok centre, is being pursued by Clermont Auvergne in France (Cronjé & Nell, 2009).

5.3 SUMMARY OF FINDINGS

This section will consider the findings of the survey, as they relate to the two research objectives, the correlation between certain demographic factors and the intention to play overseas, as well as the results of the open-ended question. The research objectives were:

- To determine the factors which influence the decision of rugby players from the top five South African rugby unions to play in an overseas league; and
- To evaluate the relative importance of the different factors and, specifically, to establish the importance of taxation as a factor in the migration decision.

5.3.1 Factors prompting players to move overseas

The influence of the various factors included in the questionnaire on the decision to play overseas or remain in South Africa was considered for the overall sample. The closer the average ranking of a factor was to 1, which was defined in the final questionnaire (refer Appendix C) as a factor which would definitely make a player move overseas, the more likely the factor was considered to influence the decision to migrate, while the closer the average ranking was to 5, defined in the questionnaire as a factor which would definitely make a player stay in South Africa, the more likely the factor was considered to influence the decision to remain in South Africa.

On this basis, the responses to the factors included in the questionnaire were judgementally grouped into three categories. Factors with an average ranking of less than

2.8 were considered likely to influence the decision to play overseas, factors with an average ranking of more than 3.2 were considered likely to influence the decision to remain in South Africa, while those with an average ranking of between 2.8 and 3.2 were considered unlikely to influence the decision either way. The results of this analysis are set out in Table 12 below – the average ranking of the factor (as noted in Appendix E) is noted in brackets.

Table 12: Categorisation of factors according to the impact on the decision to play overseas or remain in South Africa

Factors likely to influence the decision to play overseas	Factors likely to influence the decision to remain in South Africa	Factors unlikely to influence the decision either way
<ul style="list-style-type: none"> • Larger salary or other benefits payable by the overseas club (1.43) • Opportunity to gain 'international experience' at club level or the challenge of playing in a different league (2.07) • Better long-term tax benefits (2.11) • Quota system in South African rugby (2.23) • Personal security – the level or impact of crime in South Africa (2.33) • Security of income – a guaranteed basic salary as opposed to a performance fee (2.34) • Opportunity to receive sponsorships or endorsements (2.41) • Lack of development opportunities in South African rugby (2.57) • Current political situation in South Africa (2.70) 	<ul style="list-style-type: none"> • Family responsibilities or the impact on family (3.25) • Opportunity to play in the Super 14 franchise (3.66) • Competitive salary being offered by the South African team (in order to retain players) (3.81) • Opportunity to play for the Springboks (4.06) 	<ul style="list-style-type: none"> • Adaptation to the culture of another country (2.86) • Opportunity to coach or be involved with rugby, but not as a player (3.13)

From the above analysis, the factor most likely to influence players' decision to move overseas is the financial benefits associated with playing for an overseas club, with an average ranking over the sample of 1.43, while the factor most likely to influence the respondents' decision to remain in South Africa is the opportunity to play for the Springbok national team, with an average ranking of 4.06.

For some of the factors a certain disparity was observed when comparing the results based on the average ranking per factor to the modal responses for those factors. Although the lack of development opportunities in South African rugby was classified as likely to influence the decision to play overseas based on the average ranking of 2.57, the modal response, with 52% of responses, was a ranking of 3, indicating that the factor is unlikely to influence the decision either way. Nonetheless, 42% of respondents ranked the factor either a 1 or 2, indicating that the factor may influence the decision of a significant number of respondents to move overseas.

Similarly, the current political situation in South Africa, with an average ranking of 2.70, was classified as likely to influence the decision to migrate, although the modal response, with 40% of responses, was again a 3 ranking. However, when both the responses indicating that the factor will and may influence the decision are combined, 43% of respondents indicated that the current political situation is likely to influence the migration decision, supporting the classification above.

The three most important factors noted by respondents in the decision to play overseas were the following:

- Larger salary or other benefits payable by the overseas club, with 33% of respondents selecting this as one of the top three factors; the factor was also found to be most likely to influence the decision to move overseas, based on the average ranking of 1.43.
- The opportunity to gain international experience at club level or the challenge of playing in a different league, with 11% of respondents selecting this as one of the top three factors.
- The quota system in South African rugby, with 9% of respondents selecting this as one of the top three factors.

As discussed in sections 4.4.2 and 4.4.3, these findings are consistent with the results of previous studies in this area, which noted the importance of financial benefits (Ben-Porat, 2002; Collins, 2000; Cornelissen & Solberg, 2007; Cymrot & Dunlevy, 1987; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Ross & Dunn, 2007; Stead & Maguire, 2000) and the quest for experience (Cornelissen & Solberg, 2007; Elliot & Maguire, 2008; Magee & Sugden, 2002;

Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Stead & Maguire, 2000) in the migration decision. The motivations observed also align with the typology developed by Magee and Sugden (2002), with financial reasons being typical of the *mercenary* type and the desire for experience typical of the *ambitionist* type.

Although better long-term tax benefits, with an average ranking of 2.11, was considered to be more likely to influence the decision to move overseas than the quota system in South African rugby, it was not mentioned as one of the top three factors influencing the decision.

The three most important factors noted by respondents in the decision to remain in South Africa were the following:

- The opportunity to play for the Springboks, with 27% of respondents selecting this as one of the top three factors; the factor was also found to be most likely to influence the decision to remain in South Africa, with an average ranking of 4.06.
- A competitive salary being offered by the South African team (in order to retain players), with 20% of respondents selecting this as one of the top three factors.
- Family responsibilities or the impact on family, with 16% of respondents selecting this as one of the top three factors.

Even though the opportunity to play for the Springboks was noted as the most important reason to remain in South Africa, the study found that playing in South Africa as a prerequisite for selection to the Springbok national team would not tend to influence respondents' decision to play overseas, which links to the quest for experience noted earlier.

Yet again, financial reasons are noted as an important factor in the decision of whether to play overseas or not. As financial reasons were noted as the most important reason to play overseas, it would appear that respondents may be persuaded to remain in South Africa if their union were willing or able to offer them a comparable salary.

Although the opportunity to play in the Super 14 franchise, with an average ranking of 3.66, was deemed to be more likely to influence the decision to remain in South Africa than family responsibilities or the impact on family, it was not mentioned as one of the top three factors influencing the decision.

5.3.2 Importance of taxation as a factor in the decision to play overseas

The factor in the final questionnaire dealing specifically with taxation was ‘Better long-term tax benefits’. The average ranking of this factor for the sample overall was 2.11, indicating that the factor is likely to influence players’ decision to move overseas. Similarly, the factor was noted as the fourth most important in the decision to play overseas, with 8% of respondents selecting it as one of the top three most important factors affecting the migration decision.

This is considered to be consistent with the level of sophistication displayed by respondents in managing their financial affairs, with 55% of respondents indicating that they made use of the services of a financial advisor, and 45% those of a tax advisor.

5.3.3 Correlation between certain demographic factors and the intention to play overseas

Based on the results of the chi-square test to determine the relationship between marital status and the intention to play overseas, those respondents who had indicated that they were married are more likely to migrate than those who are single or unmarried but in a committed relationship. This contradicts the findings that family responsibilities are more likely to cause players to remain in South Africa and may warrant further investigation.

The Kruskal-Wallis one-way analysis of variance test to determine the correlation between age and the intention to play overseas noted a meaningful difference at the 10% level of significance between those respondents intending to move overseas and those not considering a move, indicating that players who intend playing overseas are significantly older than those not considering migrating.

Players who may be considering playing overseas have a significantly shorter expectation of their remaining playing career than those who are not considering a move overseas, based on the results of the Kruskal-Wallis one-way analysis of variance test to determine the relationship between the expected remaining playing career and the intention to play overseas, which found a significant difference at the 5% level of significance, supporting

the findings in the literature, that is, that players tend to consider migration as a means to maximising their earnings towards the end of their career (Magee & Sugden, 2002; Ross & Dunn, 2007; Sayers & Edwards, 2004).

5.3.4 Results of the open-ended question

The open-ended question required respondents to state one thing which their current rugby union could do to retain them. This question was answered by 76% of respondents – the full list of responses is set out in Appendix F. The responses were judgementally categorised into themes, and the following themes were identified:

- *Increased financial benefits* focuses mainly on better remuneration, but included other financial benefits, such as fringe benefits and sponsorships, mentioned by 46% of respondents.
- *Game time and other opportunities* includes comments relating to increased game time and opportunities to play, mentioned by 28% of respondents.
- *Relationship with the union* encompasses factors such as honesty, trust, loyalty, belief in the players, team culture and structures, mentioned by 21% of respondents.
- *Other* includes any remaining items mentioned which did not fit into one of the abovementioned categories, for instance assistance with securing a future after the end of their careers, mentioned by 5% of respondents.

In the case of two unions, increased financial benefits was the item most frequently mentioned by respondents, while the players at another two unions noted game time and other opportunities most frequently. For the remaining union, the relationship with the union was the area which respondents commented on most frequently, indicating that different unions may have to employ different strategies in order to retain players.

5.4 RECOMMENDATIONS

Based on the responses to the open-ended question, it is recommended that unions apply a multifaceted approach when considering a retention strategy, focusing on increased financial benefits, game time and other opportunities, as well as improving the relationship between the unions and the players, although individual unions may need to focus more on certain areas than on others.

5.5 CONTRIBUTION OF THE STUDY

On a theoretical level, this study built on previous research in the field of sport labour migration and corroborated the findings of previous studies regarding the factors influencing the migration decision. The results of this study, as well as previous research, noted financial reasons as the main factor in the decision to migrate (Ben-Porat, 2002; Collins, 2000; Cornelissen & Solberg, 2007; Cymrot & Dunlevy, 1987; Elliot & Maguire, 2008; Magee & Sugden, 2002; Maguire & Pearton, 2000a; Maguire & Pearton, 2000b; McGovern, 2000; Ross & Dunn, 2007; Stead & Maguire, 2000). In a South African context, the study found that taxation does indeed play a role in the migration decision.

As far as could be determined, only one other study in the field of sport labour migration has been conducted in South Africa, that is, the study conducted by Cornelissen and Solberg (2007), which focused on the inward migration of African football players to South Africa as compared to Europe. This study is therefore the second study in the field in South Africa and the first dealing with outward migration in rugby and the influence of taxation in the decision to play overseas.

On a practical level, given the concern regarding migration in rugby at international level, it is argued that awareness of the factors leading to the decision by top players to compete in overseas leagues may better equip the top five rugby unions in South Africa to manage the problem of losing top players to foreign clubs, which could lead to the local unions being more competitive in, for instance, the local Currie Cup competition and the Super 14 contest.

5.6 LIMITATIONS OF THE STUDY AND DISCUSSION OF PROBLEMS

This section considers the limitations of the study, as well as certain practical problems experienced during the execution of the study.

5.6.1 Limitations of the study

It could be argued that Springbok players are most sought after by overseas clubs, owing to their high profile and their experience at international level. The study was limited to the extent that players in the current Springbok team participating in the 2009 Tri-Nations series were in a training camp at the time the survey was conducted and, therefore, did not take part in the study. Nonetheless, 15% of the respondents to the survey had played for the Springboks in the past, and the study is thus considered to include the views of those players with experience at the highest level of rugby.

This study only considered the factors influencing the decision of players at the top five South African rugby unions, allied to the Super 14 franchise, to play in overseas leagues. The study did not consider the factors affecting the migration decision of players at the nine remaining South African rugby unions, which are not allied to the Super 14 competition, nor those factors that affect comparable rugby players in Australia or New Zealand. In addition, the study did not consider the factors shaping the decisions of other sportsmen practising their craft overseas, for example football players, golfers, athletes and the like.

Owing to the delineation in the focus of the study, the results may not be readily generalisable to other unions, countries or sporting disciplines, although, as noted in section 5.5, the findings were aligned to those of previous research conducted in the field of sport labour migration.

On reviewing the questions included in the final questionnaire and the results subsequently obtained, none of the questions are considered to have been superfluous.

5.6.2 Discussion of problems

One of the biggest obstacles to the successful conclusion of this study was the timing of the survey, which was largely influenced by the Super 14 contest and other international fixtures. During April 2009, South African teams played most of their Super 14 games in Australia and New Zealand, rendering them inaccessible and, although games were mostly played in South Africa during May 2009, it was not considered appropriate to

distribute the questionnaires at that time, owing to the pressures of the Super 14 contest. The British and Irish Lions tour to South Africa during June 2009, in which the majority of the unions participating in the study were involved, meant that teams were not well disposed to the distribution of the survey at that time. The survey was finally conducted during July 2009 when the individual unions' international fixtures had been concluded.

5.7 SUGGESTIONS FOR FUTURE RESEARCH

Based on the findings of this study and the limitations discussed above, three possible areas for future research may be suggested.

Firstly, given the differences in factors motivating the decisions of players at the five different unions to play overseas and the retention strategies suggested by respondents, it may be worth exploring the reasons for those differences. In addition, the nine unions in South Africa, not allied to the Super 14 franchise, could be included in a future study.

Secondly, it is considered worthwhile extending the scope of the study to include players in Australia and New Zealand, as the problem of player migration from the southern to the northern hemisphere is considered by the International Rugby Board (IRB) and the International Rugby Players Association (IRPA) to extend to those countries, as pointed out by Ross van Reenen (2009) from the South African Rugby Players Association (SARPA).

Lastly, the focus of a future study could include other major sporting disciplines in South Africa, for example cricket and soccer, to determine whether the factors influencing the decision of those players to play overseas are similar to those influencing the decision of rugby players, and whether or not taxation also plays a role in the migration decision in other sporting disciplines.

5.8 CONCLUSION

Based on the data provided by SA Rugby (2009), the so-called brawn drain has severely affected South African rugby over the past decade, with a total of 3 319 players leaving South Africa to go and play overseas since 2000, 32% of those on an indefinite basis. The

data supports the statement by Ross van Reenen regarding the concern of the IRB and IRPA that the problem is most pronounced as it relates to migration from the southern to the northern hemisphere, as 94% of players moved to clubs in the northern hemisphere during that time (SA Rugby, 2009; Van Reenen, 2009).

The brawn drain may negatively affect the competitiveness of South African teams, although the recent success of local teams in the 2009 Super 14 competition, with the (Blue) Bulls winning the title, as well as the success of the Springboks in the 2009 Tri-Nations series, would suggest that there is sufficient talent available in South African rugby to counteract this effect. This view was echoed by Steve Booyen (cited in Lunsche, 2007:44), chief executive of Absa, the main sponsor of South Africa's Currie Cup competition, who was quoted as saying that "SA rugby is blessed with an abundance of talented players".

The study set out to determine the importance of taxation in relation to other factors in the decision of South African rugby players from the top five South African rugby unions to play in overseas leagues instead of locally. The results of this study indicate that, while financial reasons are the most important factor in the decision to migrate, taxation is likely to influence the decision of players to move overseas, as it was noted as the fourth most important factor influencing the migration decision. Based on players' opinions, any strategy devised by the rugby unions to address the problem of player migration would have to focus on a number of facets rather than one single area of concern.

It is hoped that this research project will contribute to a greater understanding of the problem of the overseas migration of South African rugby players, including the role played by taxation, as well as a broader understanding of the concept of sport labour migration in general.

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APPENDIX A
- LETTER OF CONSENT FROM SARPA -



SOUTH AFRICAN RUGBY PLAYERS ASSOCIATION

P O Box 44380 CLAREMONT 7738 * Tel: (021) 685 5501 * Fax: (021) 685 5598 * E-mail:

sarpa@mweb.co.za *Website: www.sarpa.net

1 June 2009

Karen Koch

Sent via email : karen.koch@eskom.co.za.

Dear Karen,

**SURVEY OF PLAYERS AT SELECTED RUGBY UNIONS IN
SOUTH AFRICA RE FACTORS INFLUENCING THEIR DECISIONS TO PLAY
OVERSEAS**

With reference to your survey with the aim to determine the importance of taxation in relation to other factors which influence the decision of South African rugby players to play in overseas leagues instead of locally the following:

SARPA welcomes this survey as it will assist and may better equip the top rugby unions in South Africa to address the problem of losing top players to foreign clubs.

SARPA hereby also gives its consent for its members to participate in the study on the basis that participation in the study is voluntary and a player has the right to withdraw from the study at any stage and all responses will be treated as confidential and responses will in no way be linked to any individual player.

We would want to receive a copy of the report and a summary of the findings.

All the best with the survey.

Regards



Piet Heymans
CEO

SARPA Executive Committee:

Eddie Andrews (President), Bismarck du Plessis (Vice President), Victor Matfield (Chairman), Piet Heymans (Chief Executive Officer), Bevan Fortuin, Conrad Burke, Hanno Coetzee, Anton van Zyl, Wayne Bennett, Ross van Reenen (Co-Opted) |

APPENDIX B
- COVERING LETTER TO THE QUESTIONNAIRE -

University of Pretoria
Department of Taxation
Researcher: Karen Koch
E-mail: karen.koch@eskom.co.za
Tel: +27 82 854 5610

13 July 2009

Dear respondent

TITLE OF THE STUDY – FACTORS INFLUENCING THE DECISION OF RUGBY PLAYERS TO PLAY OVERSEAS: A SURVEY OF PLAYERS AT SELECTED RUGBY UNIONS IN SOUTH AFRICA

The aim of the study is to determine the importance of taxation in relation to other factors which influence the decision of South African rugby players (from selected rugby unions) to play in overseas leagues instead of locally, on a long-term or extended basis. Awareness of the factors may better equip the top rugby unions in South Africa to manage the problem of losing top players to foreign clubs.

The unions which are expected to participate in the study are the Blue Bulls, the Free State Cheetahs, the Golden Lions, the Natal Sharks and Western Province. SARPA and the respective unions have given their consent for players to participate in the study.

Participation in the study is voluntary, and you have the right to withdraw from the study at any stage. In order to participate in the study, you are required to complete the attached questionnaire, either in English or Afrikaans. It should take approximately **10-15 minutes** to complete the questionnaire. The completed questionnaire is to be returned no later than **22 July 2009**, by placing the completed questionnaire in the sealed envelope (enclosed) in the box provided.

The results of the returned questionnaires will be analysed and the findings reported in a dissertation to be published by the University of Pretoria, and possibly in an article published in an academic journal or presented at a conference. Although the results of the study will be shared with the rugby unions, all responses will be treated as confidential, and your responses will in no way be linked to you.

Should you wish to receive a copy of the final report, or a summary of the findings, you can obtain it from your rugby union or SARPA representative, or you may send an e-mail to the researcher to request a copy.

Should you require further information or guidance, please contact the researcher, Karen Koch, on 082 854 5610 or via e-mail at karen.koch@eskom.co.za.

Should you have any other concerns which you wish to discuss with an independent party, please contact Saré Pienaar, the supervisor to the study, on +27 12 420 5893.

Thank you in advance for your contribution to the study, should you decide to participate. If you do, remember to tick the box on the questionnaire to indicate your consent to participate.

Yours sincerely.

Saré Pienaar
Supervisor

APPENDIX C
- FINAL QUESTIONNAIRE ADMINISTERED TO PLAYERS
(ENGLISH VERSION) -

For office use only	
Number	

QUESTIONNAIRE

Please tick the box on the right to indicate your consent to take part in this study

Please indicate your choice, either by circling or marking with an X, the number next to the appropriate response (unless otherwise indicated)

1. Which South African rugby union are you currently playing for?

Blue Bulls	1
Free State Cheetahs	2
Golden Lions	3
Natal Sharks	4
Western Province	5

V1	
----	--

2. How long (in years) have you been playing for the team indicated above?

.....

V2	
----	--

3.a) Are you currently also contracted to an overseas club or have you played for an overseas club in the past?

Yes	1
No	2

V3	
----	--

3.b) If you answered yes to the previous question, please indicate the last country you played in and state the name of the club

Club in the UK – please specify	1
Club in France – please specify	2
Club in Australia – please specify	3
Club in New Zealand – please specify	4
Other – please specify	5

V4	
----	--

3.c) How long did you or have you been playing for the club indicated in the previous question? (answer in years or months, if less than a year)

.....

V5	
----	--

4. If given the opportunity to play overseas on a long-term or extended basis, please rate the extent to which the following factors would influence your decision to move to an overseas club or remain in South Africa. Please mark the appropriate option with an X

Please consider all the factors even if you are not currently contemplating moving overseas

- Key:**
- 1 = Would definitely make you move overseas
 - 2 = Might make you move overseas
 - 3 = Would not influence your decision either way
 - 4 = Might make you stay in South Africa
 - 5 = Would definitely make you stay in South Africa

	Factor	1	2	3	4	5
1.	Larger salary or other benefits payable by the overseas club					
2.	Opportunity to receive sponsorships or endorsements					
3.	Better long-term tax benefits					
4.	Quota system in South African rugby					
5.	Personal security – the level of crime in South Africa or impact thereof					
6.	Opportunity to play in the Super 14 franchise					
7.	Current political situation in South Africa					
8.	Lack of development opportunities in South African rugby					
9.	Security of income – a guaranteed basic salary as opposed to a performance fee					
10.	Family responsibilities / impact on family					
11.	Opportunity to play for the Springboks					
12.	Competitive salary being offered by the South African team (in order to retain you)					
13.	Opportunity to gain ‘international experience’ at club level / challenge of playing in a different league					
14.	Opportunity to coach or be involved with rugby, but not as a player					
15.	Adaptation (or not) to the culture of another country					
16.	Other – please specify					
17.	Other – please specify					

V6	
V7	
V8	
V9	
V10	
V11	
V12	
V13	
V14	
V15	
V16	
V17	
V18	
V19	
V20	
V21	
V22	

5. Of the factors ranked 1 or 2 in Question 4, please indicate the three most important factors which could influence your decision to move overseas. Start with the most important factor, then the second most important and lastly, the third most important factor – please write down the factor or the number associated with it in Question 4

- 1)
- 2)
- 3)

V23	
V24	
V25	

6. Of the factors ranked 4 or 5 in Question 4, please indicate the three most important factors which could influence your decision to stay in South Africa. Start with the most important factor, then the second most important and lastly, the third most important factor – please write down the factor or the number associated with it in Question 4

- 1)
- 2)
- 3)

V26	
V27	
V28	

7. Have you ever played for the Springboks (senior national team)?

Yes	1
No	2

V29	
-----	--

8. If only players playing in South Africa were eligible for selection as Springboks, would this make you stay in South Africa?

Yes	1
No	2
Maybe	3
No opinion	4

V30	
-----	--

9. How old are you? (in years)

.....

V31	
-----	--

10. Please select one option which best describes your marital status

Single / divorced / widowed	1
Unmarried, but in a committed relationship	2
Married	3

V32	
-----	--

11. How many more years do you expect to play rugby professionally?

.....

V33	
-----	--

12. Are you considering leaving the South African team you are currently playing for in order to move overseas?

Yes	1
No	2
Maybe	3

V34	
-----	--

13. Are you assisted by any of the following in planning and/or managing your financial affairs? Please mark the appropriate option with an X

	Yes	No
Financial advisor		
Tax advisor		
Accountant		
Lawyer		
Agent		
Other – please specify		

V35	
V36	
V37	
V38	
V39	
V40	

14. Please indicate one thing which your rugby union could do to keep you playing in South Africa

.....

Thank you very much for your participation in the study and the time taken to complete the questionnaire

APPENDIX D
- FINAL QUESTIONNAIRE ADMINISTERED TO PLAYERS
(AFRIKAANS VERSION) -

Slegs vir kantoorgebruik	
Nummer	

VRAELYS

Merk asseblief die blokkie langsaan om in te stem om aan die studie deel te neem

Dui jou keuse aan, deur die nommer langs die toepaslike antwoord òf te omkring òf met 'n X te merk (tensy andersins aangedui)

1. Vir watter Suid-Afrikaanse rugby unie speel jy tans?

Blou Bulle	1
Vrystaat Cheetahs	2
Golden Lions	3
Natal Sharks	4
Westelike Provinsie	5

V1	
----	--

2. Hoe lank (in jare) speel jy al vir die span bo aangedui?

.....

V2	
----	--

3.a) Is jy tans ook by 'n oorsese klub gekontrakteer, of het jy al in die verlede vir 'n oorsese klub gespeel?

Ja	1
Nee	2

V3	
----	--

3.b) Indien jy die vorige vraag ja geantwoord het, dui asseblief aan in watter land jy mees onlangs gespeel het en noem die naam van die klub

Klub in die UK – spesifiseer	1
Klub in Frankryk – spesifiseer	2
Klub in Australië – spesifiseer	3
Klub in New Zealand – spesifiseer	4
Ander – spesifiseer	5

V4	
----	--

3.c) Hoe lank het jy gespeel of speel jy al vir die klub bo aangedui? (antwoord in jare of maande, indien minder as 'n jaar)

.....

V5	
----	--

4. Indien jy die geleentheid sou kry om op 'n langtermyn basis oorsee te speel, dui asseblief aan tot watter mate die volgende faktore jou besluit om oorsee te gaan speel of in Suid-Afrika te bly sal beïnvloed. Merk die toepaslike opsie met 'n X
- Oorweeg asseblief al die faktore selfs al beplan jy nie tans om oorsee te gaan speel nie**

Sleutel: 1 = Sal maak dat jy beslis oorsee gaan speel

2 = Mag jou dalk oorsee gaan laat speel

3 = Sou nie jou besluit beïnvloed nie

4 = Mag jou dalk in Suid-Afrika laat bly

5 = Sal maak dat jy beslis in Suid-Afrika bly

	Faktor	1	2	3	4	5
1.	Groter salaris of ander voordele wat die oorsese klub aanbied					
2.	Geleentheid om borgskappe of ander endossemente te ontvang					
3.	Beter langtermyn belastingvoordele					
4.	Kwotastelsel in Suid-Afrikaanse rugby					
5.	Persoonlike veiligheid – vlak of impak van misdaad in Suid-Afrika					
6.	Geleentheid om in die Super 14 kompetisie deel te neem					
7.	Politieke toestand in Suid-Afrika					
8.	Tekort aan geleenthede om in Suid-Afrikaanse rugby te ontwikkel					
9.	Vastigheid van inkomste – gewaarborgde basiese salarisse teenoor 'n optredefooie					
10.	Verantwoordelikhede teenoor familie / impak op familie					
11.	Geleentheid om vir die Springbokke te speel					
12.	Vergelykbare salaris wat deur die Suid-Afrikaanse span aangebied word (om jou te behou)					
13.	Kans om internasionale ondervinding op klubvlak op te doen / uitdaging verbonde daaraan om in 'n ander liga te speel					
14.	Geleentheid om af te rig of op 'n ander manier by rugby betrokke te wees, maar nie as 'n speler nie					
15.	Aanpasbaarheid by die kultuur van 'n ander land					
16.	Ander – spesifiseer					
17.	Ander – spesifiseer					

V6	
V7	
V8	
V9	
V10	
V11	
V12	
V13	
V14	
V15	
V16	
V17	
V18	
V19	
V20	
V21	
V22	

5. Rakende die faktore in Vraag 4 wat 1 of 2 gemerk is, dui asseblief die drie belangrikste faktore aan wat jou besluit om oorsee te gaan speel mag beïnvloed. Begin met die belangrikste faktor, dan die tweede belangrikste en laastens, die derde belangrikste – skryf òf die faktor òf die gepaardgaande nommer uit Vraag 4 neer

- 1)
- 2)
- 3)

V23	
V24	
V25	

6. Rakende die faktore in Vraag 4 wat 4 of 5 gemerk is, dui asseblief die drie belangrikste faktore aan wat jou besluit om in Suid-Afrika te bly mag beïnvloed. Begin met die belangrikste faktor, dan die tweede belangrikste en laastens, die derde belangrikste – skryf òf die faktor òf die gepaardgaande nommer uit Vraag 4 neer

- 1)
- 2)
- 3)

V26	
V27	
V28	

7. Het jy al ooit vir die Springbokke (senior nasionale span) gespeel?

Ja	1
Nee	2

V29	
-----	--

8. Indien slegs spelers wat in Suid-Afrika speel in aanmerking geneem sou word vir Springbok keuring, sou dit jou in Suid-Afrika laat bly?

Ja	1
Nee	2
Miskien	3
Geen opinie	4

V30	
-----	--

9. Hoe oud is jy? (in jare)

.....

V31	
-----	--

10. Kies asseblief een opsie wat jou huwelikstatus die beste beskryf

Alleenloper / geskei / wewenaar	1
Ongetroud, maar in 'n vaste verhouding	2
Getroud	3

V32	
-----	--

11. Hoeveel jare verwag jy om nog professioneel rugby te kan speel?

.....

V33	
-----	--

12. Oorweeg jy dit tans om die Suid-Afrikaanse span vir wie jy speel te verlaat om oorsee te gaan speel?

Ja	1
Nee	2
Miskien	3

V34	
-----	--

13. Word jy deur enige van die volgende persone bygestaan in die beplanning en/of bestuur van jou finansiële aangeleenthede? Merk die toepaslike opsie met 'n X

	Ja	Nee
Finansiële adviseur		
Belastingadviseur		
Rekenmeester		
Prokureur		
Agent		
Ander – spesifiseer		

V35	
V36	
V37	
V38	
V39	
V40	

14. Dui asseblief die een ding aan wat jou rugby unie kan doen om jou in Suid-Afrika te hou

.....

Baie dankie vir jou deelname aan die studie en jou tyd om die vraelys te voltooi

APPENDIX E

**- AVERAGE RANKING PER FACTOR INFLUENCING THE DECISION TO
PLAY OVERSEAS ANALYSED PER UNION -**

Table 13: Average (mean) ranking per factor influencing the decision to play overseas (n = 88 unless otherwise indicated)

Factor	Union A	Union B	Union C	Union D	Union E	Overall
Larger salary or other benefits payable by the overseas club	1.18	1.33	1.60	1.69	1.38	1.43
Opportunity to receive sponsorships or endorsements	1.76	2.44	2.80	2.38	2.75	2.41
Better long-term tax benefits	1.71	2.07	2.35	2.44	1.88	2.11
Quota system in South African rugby	2.12	1.85	2.50	2.38	2.75	2.23
Personal security – the level or impact of crime in South Africa	2.06	1.89	2.45	3.06	2.63	2.33
Opportunity to play in the Super 14 franchise	3.88	3.81	3.30	3.69	3.50	3.66
Current political situation in South Africa	2.29	2.59	2.90	2.88	3.13	2.70
Lack of development opportunities in South African rugby	2.35	2.67	2.50	2.56	2.88	2.57
Security of income – a guaranteed basic salary as opposed to a performance fee	2.41	2.19	2.25	2.38	2.88	2.34
Family responsibilities / impact on family (n = 87)	3.65	3.48	3.05	2.56	3.57	3.25
Opportunity to play for the Springboks (n = 86)	4.18	4.04	4.05	3.73	4.57	4.06
Competitive salary being offered by the South African team (in order to retain you)	3.76	3.93	3.65	3.81	3.88	3.81
Opportunity to gain 'international experience' at club level / challenge of playing in a different league	1.88	2.37	1.85	2.06	2.00	2.07
Opportunity to coach or be involved with rugby, but not as a player	3.24	3.37	2.85	3.00	3.00	3.13
Adaptation to the culture of another country (n = 86)	2.88	3.08	2.58	2.75	3.00	2.86

The question utilised a Likert scale, with the following key for the different rankings being provided in the questionnaire:

- A factor ranked **1** would definitely make a player move overseas
- A factor ranked **2** might make a player move overseas
- A factor ranked **3** would not influence a player's decision either way
- A factor ranked **4** might make a player stay in South Africa
- A factor ranked **5** would definitely make a player stay in South Africa

APPENDIX F
- RESPONSES TO THE OPEN-ENDED QUESTION ANALYSED
ACCORDING TO THEMES -

Table 14: Responses to the open-ended question analysed according to themes (n = 67)

Questionnaire	Response	Increased financial benefits	Game time and other opportunities	Relationship with union	Other
002	Market related remuneration	X			
003	Better financial remuneration	X			
004	Better salary and benefits	X			
005	Salary comparable to overseas clubs	X			
006	Bigger budget (for union) to compete with other unions with respect to contracts and salaries	X			
007	More money and looking after you as a person	X		X	
009	Include in starting line-up to build momentum – “the bench kills your rugby”		X		
011	Market related salary	X			
012	"Pay more money – easy"	X			
013	Better salary	X			
014	Competitive salary and tax benefits	X			
017	Opportunity to play		X		
018	Contract			X	
020	Opportunities		X		
021	Playing opportunities		X		
022	Contract			X	
023	Keep good structures			X	
024	More money	X			
025	"Give me millions of dollars!!!!!"	X			
026	Good money	X			
028	More money and opportunities	X	X		
029	Better salary	X			
030	Salary	X			
031	More money	X			
032	Nothing noted				X
034	Good salary and opportunity to play	X	X		

Questionnaire	Response	Increased financial benefits	Game time and other opportunities	Relationship with union	Other
035	"Be honest, always"			X	
036	Better remuneration for non-Springboks	X			
037	More matches for the union and more money	X	X		
038	More money	X			
041	Money!	X			
043	Good contract			X	
044	More opportunities		X		
045	No complaints				X
046	Good money	X			
047	Opportunity to play and salary increase	X	X		
048	"Keep you happy"			X	
049	Select best possible team at provincial and international level			X	
051	Just wants opportunity to play		X		
053	Continually benefit your situation as professional sportsman			X	
054	Corporate sponsorship with financial and long-term gain	X			
055	More money	X			
056	Be open and honest			X	
057	Good relationship with the players and be honest			X	
059	Belief in local players			X	
060	Create a positive relationship			X	
061	Game time		X		
062	Assist with security or future after rugby				X
065	More money	X			
068	Loyalty, good salary, insurance and safety	X		X	
069	Business outside rugby for security after 'retirement'				X
070	Bigger salary	X			
071	Fair selection		X		
072	More game time and better salary, also security	X	X		
073	Better match fees	X			
075	Opportunity to play in Super 14 and become a better player		X		
077	Better career prospects		X		

Questionnaire	Response	Increased financial benefits	Game time and other opportunities	Relationship with union	Other
078	Cash	X			
079	Game time		X		
080	Fair chance or equal opportunities		X		
081	Game time!		X		
082	Team culture or happy environment and game time		X	X	
083	More fringe benefits	X			
084	Opportunities to grow		X		
086	Opportunity to play more games		X		
087	Build trust and confidence			X	
089	More money	X			

Note that comments have been translated into English (from Afrikaans) where necessary.