



GET READY TO HOST THE MOST

# GROUNDBREAKING

EVENT IN RUGBY



RUGBY  
WORLD CUP



Women's rugby is one of the world's fastest-growing team sports and a major driver of rugby's phenomenal global participation and fan growth, with more new female participants getting into the sport in 2019 than male and a total playing population of more than 2.7 million.

The development of women in rugby is the single greatest opportunity for our sport to grow globally in the next decade, and we have an unwavering commitment to advance women in rugby both on and off the field.

RWC 2025 and 2029 promise to capitalise on the meaningful movement behind women's sport to achieve something groundbreaking for rugby, the host nation and advancement of women.

**Sir Bill Beaumont**  
*World Rugby Chairman*





THE OPPORTUNITY TO HOST RUGBY WORLD CUP

# THE FASTEST GROWING RUGBY EVENT IN THE WORLD





# OPPORTUNITY TO HOST RUGBY WORLD CUP

Although the first women's Rugby World Cup was held in 1991, the tournament is still in its infancy. Women's rugby is one of the fastest growth trajectories in world sport and has experienced incredible growth in established and emerging global markets.

There are now 2.7 million global female rugby participants, which accounts for 25 per cent of the total rugby players globally.

This growth has allowed for significantly greater pathway opportunities for elite players, which in turn will further grow the game and the status of its marquee event.

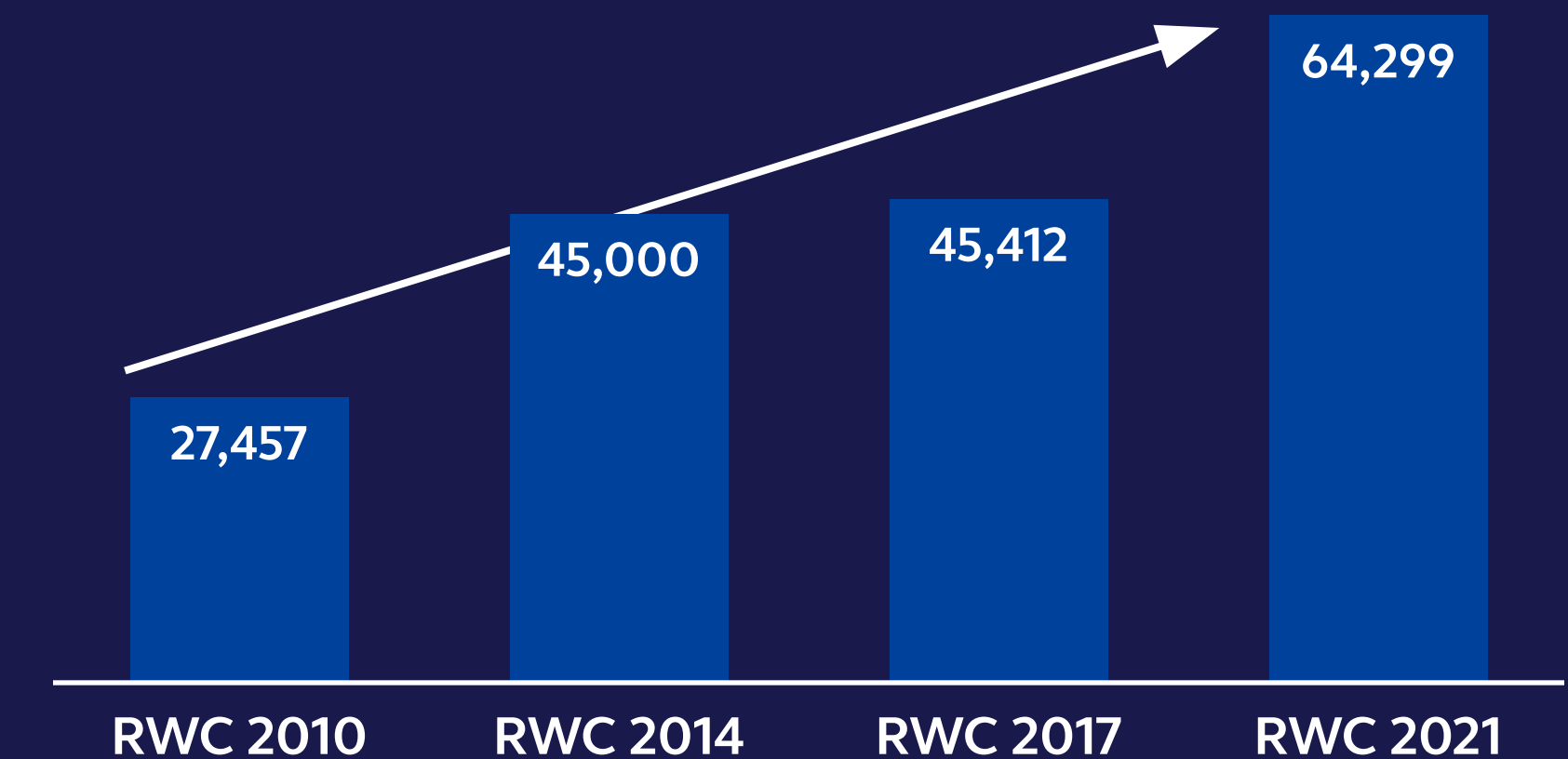
Rugby World Cup is also experiencing exponential growth in all engagement metrics, with coverage, audiences, attendances and fans all increasing each tournament.

## THE GROWTH OF WOMEN'S SPORTING EVENTS

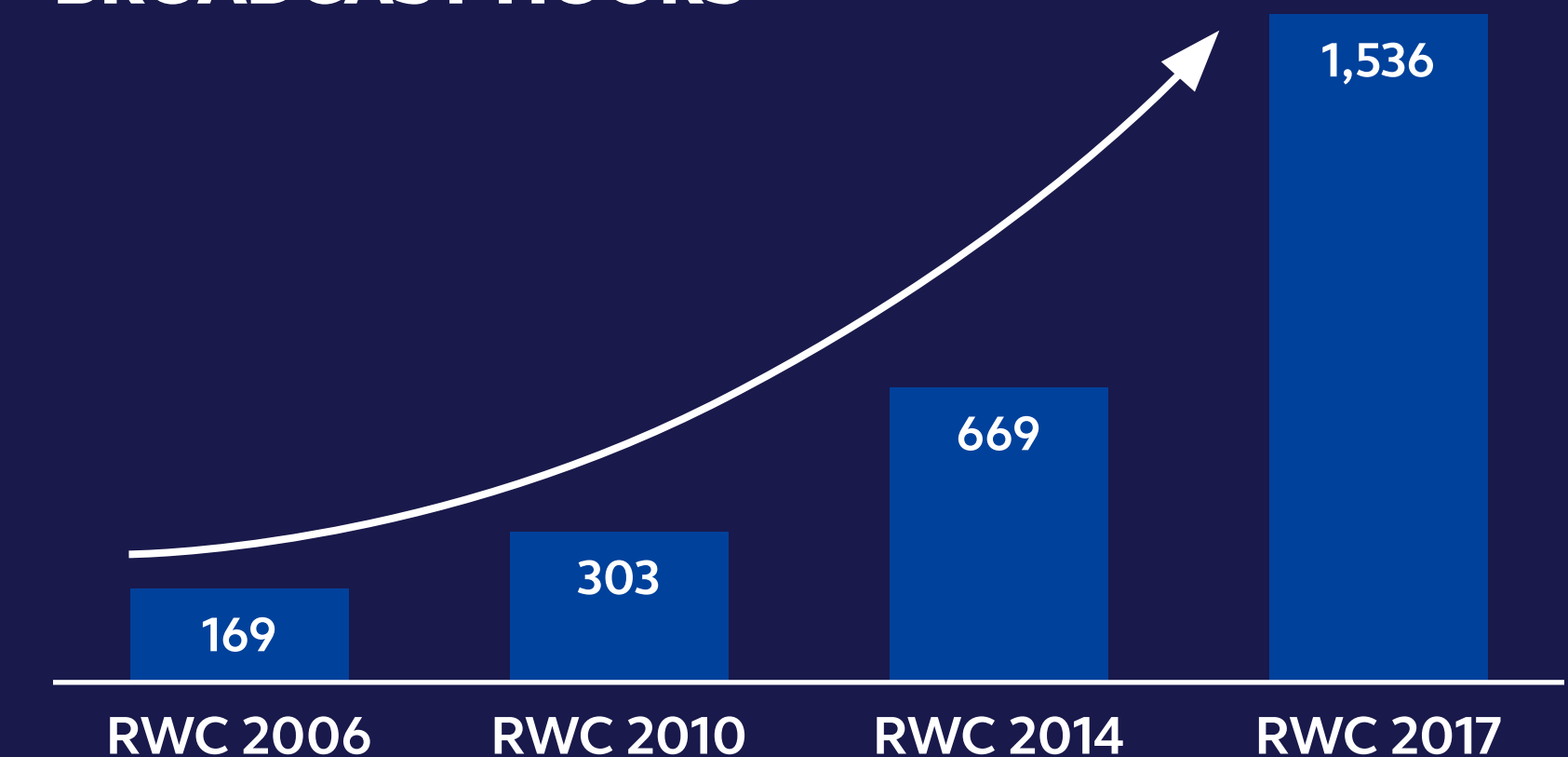
Women's sports events have seen incredible growth over the past decade, which is evidenced by the growth not only of the Rugby World Cup but also events such as the FIFA Women's World Cup and ICC Women's Cricket World Cup.

World Rugby is keen to ensure this growth continues and has dedicated significant investment in the women's game, including the competition infrastructure for the next decade and beyond.

## WOMEN'S RWC ATTENDANCES



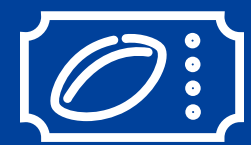
## WOMEN'S RWC TOTAL BROADCAST HOURS





# ECONOMIC IMPACT AND TOURISM BENEFITS

The likely impact of hosting Rugby World Cup is based on the venue capacity, likely attendance and proximity to established and emerging rugby markets. The below provides ranges based on historical Rugby World Cup results.



Projected between 85,000 and 150,000 tickets sold (20% internationals) across a four-week tournament



6,000 – 10,000 unique international visitors



RWC international visitors stay on average 11 nights, spending £650 in the host region economy



Direct visitor and organisational expenditure into the host region economy ranges between £8.2M - £11.2M



200 – 300 jobs created





## TOTAL ECONOMIC IMPACT OF HOSTING RUGBY WORLD CUP

# £21-£29M

Includes the direct international visitor and net organisational expenditure, and accounting for the flow on impacts down the supply chain.

- Total direct organisational expenditure (i.e. new money spent in the host region as a result of hosting Rugby World Cup) = proportion of operational expenditure Rugby World Cup Limited (RWCL) spent in the host region plus the World Rugby Grant plus the revenue the Local Organising Committee (LOC) generates as a result of the sale of international tickets.
- Total additional organisational expenditure as a result of the tournament is between £2.3 million and £4.2 million.
- The Local Organising Committee will spend between £3.8m and £5.2m to deliver RWC. This is used to promote and deliver the tournament including hiring of stadia and operational costs, such as accommodation and transport, which stimulates a variety of sectors of the economy. However, for the purposes of this analysis, only new money generated from international tickets (i.e. sourced outside of the host region) has been used to determine the total direct organisational spend.









# GLOBAL ENGAGEMENT

Women's rugby is one of the fastest growth trajectories in world sport and has experienced incredible growth in established and emerging markets.

In 2017, excluding China and India, there were 54 million fans of Rugby World Cup and RWC 2017 saw 34 million individual cumulative viewers.

This interest in the sport and the marquee tournament has seen exponential growth in other Rugby World Cup engagement metrics with total coverage (hours) of RWC 2017, nine times that of the coverage of RWC 2006.

This significant exposure of the host country and its cities to key tourism markets, enables hosts to leverage this exposure to build a brand and assist in driving future visitation to the host destinations.

## RWC 2017 RESULTS

**54M**

Global fans of the women's Rugby World Cup

**8.3M**

Social media followers

**34M**

Cumulative viewers globally (up 26% on RWC 2014)

**16M**

Live cumulative viewers

**1,536**

Hours of coverage (up 130% on RWC 2014)

**200+**

Global markets covered the tournament

**£7M**

Host city / host nation branding media value

**174M**

Page views on [rwcwomens.com](http://rwcwomens.com) during RWC 2017

**45M**

Video views on social channels



# WOMEN'S RUGBY WORLD CUP GLOBAL FAN BASE

**EUROPE**  
29m / 53.3%

**NORTH AMERICA**  
9m / 16.6%

**AFRICA &  
MIDDLE EAST**  
6m / 11.3%

**AUSTRALASIA**  
8m / 15.4%

**SOUTH AMERICA**  
2m / 3.5%











# RAISING THE PROFILE OF WOMEN'S SPORT

Rugby World Cup is a cost efficient mechanism to raise the profile of women's sport, which delivers significant social benefits as it promotes gender equality and inclusion and also participation in sport.



## PARTICIPATION AND HEALTH

Inspiring young females to take up sport and increase physical activity

- 65%** of live spectators at RWC 2010 felt inspired to start playing or participate more frequently in rugby as a result of their attendance at the event
- 28%** of viewers felt inspired to participate or participate more frequently in sport as a result of watching a major event on TV such as RWC 2010
- 75%** of spectators under 25, and half of all TV event viewers under 25, felt inspired by that experience to participate more frequently in sport





## RUGBY LEGACY

Creating empowering high-performance pathways and resources to develop sustainable participation

Establishing broad-ranging legacy platforms such as education, participation, volunteering, coaching and refereeing programmes



## LEADERSHIP

Supporting the growth of future female leaders at any level of their chosen sport, profession and within their local communities

**75%** of followers believe rugby can be character building

**71%** of followers believe rugby can instill life skills

**74%** of female senior executives believe sport can accelerate a woman's career

Rugby World Cup provides a foundation for driving governance and leadership development opportunities through scholarships, workshops and mentoring



# RWC HOST SELECTION PROCESS TIMELINE

RWCL will officially launch the RWC 2025 and RWC 2029 host selection process in February 2021, with the launch of the DIALOGUE PHASE.

This new phase has been designed to provide an opportunity to collaborate on the business and delivery proposals and align host country and RWCL objectives.

From October this year, RWCL will engage in discussions with interested parties to prepare them for the DIALOGUE PHASE.







Further details on the impacts of hosting RWC  
are outlined in the MI Associates report,  
'The Benefits of Hosting RWC'.

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