

GET READY TO HOST THE MOST

ICONIC

EVENT IN RUGBY



RUGBY
WORLD CUP

As rugby's pinnacle tournament and one of the biggest sporting events on the planet, the men's Rugby World Cup is contested by the 20 best international teams in the world, every four years.

A global celebration of culture, sport and rugby's values, hosted in existing stadia, makes Rugby World Cup one of the world's most sought-after events.



Rugby World Cup is one of the most popular, relevant and visible major sporting events in the world and the inspiration and financial driving force behind rugby's continued record global fan and participation growth.

The 2019 edition in Japan was a trailblazer in many ways. As the first Rugby World Cup hosted outside of a top 10 ranked nation and the first in Asia, it set new standards on and off the field, delivering a record economic impact and attracting more than two million new participants. But more than that, it challenged and changed perceptions, increased national pride and demonstrated rugby's ability to inspire.

In a rapidly-changing world, Rugby World Cup continues to adapt, evolve and ensure that, through a spirit of meaningful partnership, it is relevant, appealing and cost effective for host nations, delivering on their objectives and generating multiple economic, sporting and social benefits. In short, it is great for rugby and great for hosts.

This ground-breaking host selection process, which for the first time combines men's and women's editions, encapsulates that spirit. It will create an unprecedented platform to develop bespoke business partnerships that will ensure a meaningful, impactful and long-lasting return on investment.

Sir Bill Beaumont

World Rugby Chairman



THE OPPORTUNITY TO HOST RUGBY WORLD CUP

THIRD MOST POPULAR

SPORTING EVENT IN THE WORLD





405 MILLION

Rugby fans across
the globe



1.6–2.6 MILLION

Total in stadia attendance
(>90% venue capacity)
across 48 matches in a six-
week tournament



150K–410K

Unique international
visitors



857 MILLION

Cumulative individual RWC
2019 viewers
(+26% from RWC 2015)



2 BILLION+

Video views on RWC 2019
social channels
(+600% from RWC 2015)



£1.0–£2.9 BILLION

Total direct and indirect
economic impact

In addition to driving significant economic, media, social and legacy benefits for the host nation, hosting Rugby World Cup presents the opportunity to benefit from additional commercial revenues such as ticketing or hospitality.

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 1.6 million and 2.6 million tickets sold (30% internationals)



150,000 – 410,000 unique international visitors



RWC international visitors stay on average 14-15 nights, spending £2,600 in the host region economy



Direct visitor expenditure into the host region economy ranges between £405M - £1.1BN



10,000 – 28,000 jobs created





PARIS, FRANCE

TOTAL ECONOMIC IMPACT OF HOSTING THE RUGBY WORLD CUP

£1-£2.9BN

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

- The Local Organising Committees have spent between £88 million and £156 million to deliver each of the recent Rugby World Cups (RWC 2007 to RWC 2015).
- The ticket revenue generated was used to run, facilitate and promote the tournament, including hiring of the stadia, operational expenses, technology upgrades and other essential costs that are involved in delivering the tournament.
- The expenditure on these essential products and services stimulated a variety of sectors across the economy and have provided further impacts down the entire supply chain, however for the purposes of this report, only new money generated from international visitors has been included.



CARDIFF, WALES, UK



GLOBAL ENGAGEMENT

Rugby is one of the fastest growing sports in the world with 405 million fans across 85 key countries. Although there has been consistent growth across almost all established markets, emerging markets across Europe, Asia and USA have seen 81 million new fans (+94%) in the last six years.

Host destinations can be assured that hosting Rugby World Cup generates significant positive engagement across the globe (visitation, viewership, social media engagement) with key metrics continuing to increase each tournament.

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.

GLOBAL FAN BASE

- **405 million fans** (+18% YoY)
- **126 million avid fans** (+ 17%)
- **20% - 25%** of the population in traditional rugby nations are interested in RWC
- Emerging markets across Europe, Asia and USA have seen **81 million new fans (+94%)** in the last six years

BROADCAST

- RWC 2019 saw **857 million viewers** globally (up 26% on RWC 2015) with **506 million live viewers**
- **21,766 hours of coverage** (up 36% on RWC 2015)
- 94 global broadcasters reaching nearly **200 unique markets**

SOCIAL MEDIA

- **2 billion+** video views on social channels, up 600% from RWC 2015

MEDIA VALUATION

- **£39 million** in host city / host nation branding media value

MEN'S RUGBY WORLD CUP GLOBAL FAN BASE

NORTH AMERICA

68m / 16.6%

EUROPE

103m / 25.5%

ASIA

143m / 35.4%

AFRICA & MIDDLE EAST

31m / 7.6%

SOUTH AMERICA

55m / 13.5%

AUSTRALASIA

6m / 1.4%

YOKOHAMA, JAPAN



COMMUNITY SUPPORT AND ENGAGEMENT

RWC 2007 **80%** of French fans said RWC 2007 created passion and excitement within the local community

RWC 2019 **87%** of the Japanese public agreed that RWC 2019 captured the nation’s imagination

85% of the Japanese public agreed that the nation got behind the national team as they progressed through the tournament

RWC 2023 Bid **68%** of the French public agreed that hosting RWC 2023 would be great for France’s image internationally

70% of the French public agreed that hosting RWC 2023 would be a great chance to showcase France on the international stage

Rugby World Cup has a proven ability to deliver significant world-class experiences for the local community that leave a lasting legacy.

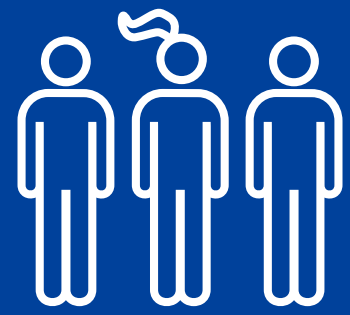
Every Rugby World Cup is designed to create positive experiences for the local community that increases a sense of belonging and facilitates a far more vibrant, sociable and engaging environment.

In turn, these positive experiences provide a strong foundation for the public to support future event initiatives that become more critical for major international events. While all events facilitate this to a degree, the level of impact an event can have on the local community and their sense of pride varies significantly as it requires a unique combination of sport and cultural engagement, outstanding match-day experience and national and host city programmes that excite and engage the nation, that only large-scale global sporting events like Rugby World Cup can provide.

High interest levels in the tournament is a critical factor in fostering emotional connection through national representation, which ultimately solidifies and unites local communities.



ADDITIONAL SOCIAL AND ECONOMIC BENEFITS



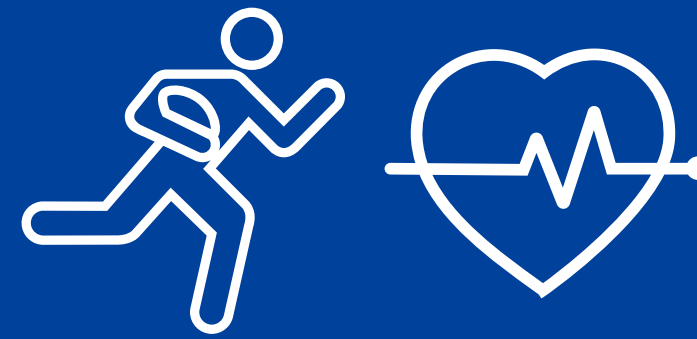
VOLUNTEERS

Between **5,600 - 11,300** volunteers to assist in the delivery of the tournament

85% are likely to volunteer again

Benefits of volunteering include:

- Giving people a sense of achievement and purpose
- Helping people feel part of a community
- Helping people feel better about themselves by improving self-esteem and confidence
- Helping people share their skills, learn new skills and create a better work-life balance
- Helping combat stress, loneliness, social isolation and depression
- Helping people meet new people, which can help them feel more connected and valued.



PARTICIPATION AND HEALTH

Rugby World Cup can be leveraged by host nations to inspire sporting engagement and increased participation levels.

2.27 million new participants tried rugby in Asia since 2016 due to Japan hosting RWC 2019.

England experienced **2.5x** the normal growth in rugby participation in 2016 post RWC 2015.

Australia experienced **2.8x** the normal growth in rugby participation in 2004 post RWC 2003.

Increasing local community physical activity benefits not only an individual's physical and mental health but it also reduces the burden of local government to provide related medical support services.



TRADE AND DIPLOMACY

Rugby World Cup is a proven avenue to drive long-term trade and diplomatic opportunities for host nations.

Due to the breadth and depth of the rugby fan base across the globe, Rugby World Cup has a proven record of bringing global business and Government leaders to the host region.

This creates unsurpassed opportunities for local businesses and governments alike to develop enhanced trade and diplomatic relations and ultimately secure significant new income into the host economy.

Australia drove in excess of AUS\$500m in new trade deals as a result of RWC 2003, while New Zealand drove up to NZ\$150m in new trade deals as a result of RWC 2011.

RWC HOST SELECTION PROCESS TIMELINE

RWCL will officially launch the RWC 2027 and RWC 2031 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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