

Economic, Social and Environmental Impact Study of Rugby World Cup 2023

May 2024

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The better the question. The better the answer.
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Credit : France 2023



0 Summary

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Foreword on the Economic, Social and Environmental Impact study of Rugby World Cup 2023

The Rugby World Cup 2023 (RWC 2023), held in France from September 8 to October 28, was undeniably a popular, media, and sporting success.

With nearly 2.4 million tickets sold, this major global sporting competition reached the level of RWC 2015 in the United Kingdom (2.5 million tickets sold) and surpassed RWC 2019 in Japan (1.7 million). In total, 1 million people experienced at least one match, with 41% of international spectators. In total, the matches were watched nearly 1.3 billion hours, making it the most-watched rugby event of all time.

But what about the economic benefits for France, its businesses and its territories, as well as the environmental and social impact of the event?

Organising major international sporting events (MISE) faces significant challenges. These include social acceptability and environmental sustainability, especially as new destinations emerge, like those in the Persian Gulf. With the 2024 Olympic and Paralympic Games (OPG) on the horizon, the importance of these issues is magnified. The study at hand, initiated by the Ministry of Sports and the Olympic and Paralympic Games and conducted by EY from July 2023 to March 2024, serves a twofold purpose: assessing the overall impact of the event and extracting valuable insights for the planning of future MISE.

This assessment was primarily based on data provided by France 2023, the organiser, and World Rugby, the rights holder. A survey of 13,000 visitors and ticket holders was conducted out and was complemented by an extensive literature review, as well as around sixty interviews with multiple stakeholders, including the French Rugby Federation (FFR), partner companies and representatives of host cities and regions.

The economic impact study reports on both the total spending associated with the event and the net economic impact into the French territory. While the total spending includes direct spending regardless of the origin or location of the spending, the net impact refers to the incoming financial flows (international spectators and organisation expenses) related to foreign sources of income, from which are deducted the financial flows leaving the territory (for example, France 2023's expenses with World Rugby), based on the methodology recommended by the French Ministry of Sports.

Thus, the expenses of French economic stakeholders (spectators, organisational expenses from French income) are excluded from the net impact, in accordance with the recommendations of the report *"La mesure de l'impact d'un événement touristique"* (*"Measuring the impact of a tourism event"*) of the *Direction Générale des Entreprises*. On the other hand, the environmental impact accounts for emissions related to all activities resulting from the event, regardless of the origin or nationality of the actors concerned - the objective of this exercise being to identify ways to reduce the greenhouse gas emissions related to the event.

Finally, this impact study does not in any way address the financial statements of the France 2023 public interest group (GIP) and the France 2023 economic interest Group (EIG), which are established independently by these structures.

Economy

Rugby World Cup 2023 transcended the realm of sports to become a driver of tourism activity and economic attractiveness, creating jobs, with a moderate net cost to public finances.

RWC 2023 generated 1.8Bn€ in spending, leading to 690M€ in direct impact, 143M€ in indirect impact, and 38M€ in induced impact (totalling 871M€ in overall impact). The net impact is calculated excluding the expenses of French visitors and domestic organisational spending to reflect the net impact of the event. Expenditures made by the organisers to World Rugby and potential tourism crowding out effect were also subtracted.

About 85% of this added value is linked to tourism (accommodation, restaurants, attractions) and 15% to organisation (supplies, security, marketing).

Nearly 425,000 international visitors came to France for the event, accounting for 41% of the total. Their added value is very positive compared to the "average" tourist. For example, comparing a international event visitor with a international tourist from the PACA region, the length of stay is longer (10.3 days vs. 8.2) and the daily spending is twice as high (170€ vs. 87€).

The direct economic impact related to tourism amounted to 585M€, a figure similar to that achieved by UEFA Euro 2016. More than half of the tourist spending benefited the accommodation and restaurant sectors. These sectors were thus able to partly rebuild their post-COVID margins, especially during the traditionally shoulder September-October period. Short-term rentals partly helped to adjust the tourist accommodation offer, thus limiting the crowding out effect and maximising the spending of international tourists (the only population considered here), which is a significant change compared with UEFA Euro 2016.

The direct economic impact related to organisation amounted to 105M€, compared to 558M€ for UEFA Euro 2016. This difference is due to a different governance model: UEFA had decided to internalise the organisation, while World Rugby outsourced the organisation to a Public Interest Group (GIP France 2023) and expenses to the rights holder (World Rugby) resulted in a leakage of 196M€ from the national territory, subtracted from the total economic impact – expenses that did not exist during UEFA Euro 2016.

From the organiser's perspective, the great satisfaction of this World Cup was the almost exclusive use of French service providers. While for UEFA Euro 2016, 36% of subcontractors were foreign, their share has become negligible today, illustrating the French strategy of re-internalising skills in this sector in view of the Paris 2024 OPG. Across all sectors, the additional activity generated thus allowed for the creation of about 5,200 jobs for the year 2023 alone.

While the organisation of the event incurred 70M€ in public spending (excluding aid for the employment of apprentices from the CFA Campus 2023 and subsidies for the training of said apprentices), the spending of international visitors and organisational services brought in 84M€ in tax revenue, mainly thanks to VAT (79%) and the tourist tax (15%).

Environment

By attracting visitors from across the globe, many of whom arrived by plane, Rugby World Cup 2023 has had a significant environmental impact, despite efforts by France 2023 to mitigate and compensate for the carbon footprint.

The carbon impact of Rugby World Cup 2023 reached 830ktCO₂eq, equivalent to the average annual carbon footprint of about 90,000 French citizens.

Leveraging existing infrastructure was a key advantage of the French organisation in terms of financial and environmental efficiency. Overall, the carbon footprint of the event was three times lower than that of UEFA Euro 2016, as Rugby World Cup 2023 mostly utilised pre-existing facilities or those requiring minimal renovation.

Transport was the primary contributor to emissions, accounting for 94% of the event's carbon footprint. The substantial number of long-distance flights significantly worsened the event's carbon impact (84% of emissions stemmed from visitors' travel from their home countries to France). Consequently, 58% of these emissions are associated with the 12% of visitors coming from outside Europe.

Air travel was responsible for 82% of the competition's greenhouse gas (GHG) emissions, used for both arriving in France and traveling within the country. The spread of host cities and metropolises across a large part of the mainland, as well as the base camps, necessitated air transport. The decision to have 10 host cities and metropolises allowed the entire country to participate in the event but led some spectators and their companions to favour flying for distances over 400km (27% modal share).

The carbon footprint per visitor related to travel was four times higher for Rugby World Cup 2023 than for a spectator at UEFA Euro 2016, due to the global nature of the event: the carbon footprint of non-European visitors reaches nearly four times that of European visitors (4.3tCO₂eq vs. 0.9tCO₂eq).

Emissions from air travel were more than double those estimated for the implementation of France 2023's ambitious carbon offset program (300ktCO₂eq vs. 684ktCO₂eq realised). The competition's duration also led to an increase in trips to France, with an average of 1.8 round trips per spectator.

Territories

The entire French territory emerged as a winner from Rugby World Cup 2023, with a significant ripple effect of the impact extending beyond the host cities and metropolises.

39% of the economic impact generated by the event went to cities that did not host any of the 48 matches played, which is quite remarkable. More than 30% of the visitors stayed at least one night away from a host city and metropolis (v. 19% at UEFA Euro 2016). This radiating effect is the result of two main factors: the long duration of the event (51 days v. 31 for UEFA Euro 2016) and the large number of host cities and metropolises (10) and base camps (20), scattered throughout the country.

Paris, Saint-Denis and Marseille captured 28% of the economic impact of the event thanks to the hosting of 16 prestigious matches (including all the finals) and higher capacities in their stadiums. The other seven host cities and metropolises were able to benefit from 33% of the spin-offs. The remainder, i.e. the effect of spilling out of the host cities and metropolises, has benefited in particular coastal territories (Côte d'Azur, Basque Country, Charente-Maritime), wine tourism (Champagne, Gironde, Burgundy) and heritage territories (Normandy, Loire).

This territorial impact was fostered by the 2,300 activities offered by the driving forces of rugby, local authorities and partners of France 2023, before and throughout the duration of the event (broadcasts, animations, tournaments, exhibitions, etc.).

Sport

The event was a tremendous illumination of rugby's values, but its organisation, as efficient as it was (with an operating result higher than that of the organising committees of other World Cups on a comparable scope), was hampered by large-scale related projects (operation of the entire range of hospitality services, creation and management of the CFA Campus 2023) that were not integrated into the bid's economic model and whose structural economic imbalances will weigh on the total financial profit of France 2023.

The number of members in FFR-affiliated clubs increased by +15% between February 2023 and February 2024, a rise attributed to the heightened interest in rugby at the start of the school year and enrolments in rugby schools. Notably, the event appears to have positively influenced the expansion of rugby practice in priority neighbourhoods of urban policy and in non-host territories.

According to a September 2023 survey by Odoxa, 84% of French people have a positive perception of rugby. Female fans were notably present, making up almost a quarter of stadium spectators compared to 10% for UEFA Euro 2016, and 82% of female spectators felt inspired to play rugby.

However, the economic impact achieved was less than anticipated at the time of the bid (690M€ vs. the expected 910M€ to 1,124M€), mainly due to two factors: the average spending per international spectator was 25% lower than projected (even after adjusting for inflation), and a hospitality program that predominantly catered to French spectators (who are excluded from the economic impact calculation) when the expectation was to attract mostly international spectators.

Inclusion

An ambitious Corporate Social Responsibility (CSR) strategy enabled the inclusion of individuals far from employment and rugby in this widely celebrated event.

Considerable efforts were made to ensure Rugby World Cup 2023 was accessible to everyone, both in and out of the stadiums. Nearly 160,000 individuals directly benefited from the initiatives developed as part of the France 2023 CSR strategy, including unaccompanied minors, youth from urban priority areas, people on minimum social benefits, and individuals with disabilities.

A portion of this ambitious program is expected to continue after the event, creating a lasting legacy. In particular, the *Rugby au Cœur* endowment fund, which financed over 200 local projects, is likely to be sustained within the FFR as it strives to become a "mission-driven federation"*.

Over 7,000 volunteers were engaged during the event, with 4,400 coming through France 2023. 48% believe that the skills they gained during Rugby World Cup will be valuable in their professional lives. This percentage is even higher among the youth and those far from employment. The event also appears to have sparked a more regular commitment to volunteering, with nearly all volunteers expressing a desire to continue volunteering in the coming months.

In recognition of these efforts, France 2023 was awarded the first government "Terrain of equality" label for its actions promoting inclusion and equality at all levels of the organisation.

*In French law, a mission-driven federation is a federation that integrates social, environmental, or societal goals into its core activities alongside its traditional objectives.

Source: Online survey of 11,121 ticket holders (November 1 - 26, 2023), EY analysis

Perspectives

Drawing on the insights from this impact study, future major international sporting events (MISE) can be seen as accelerators, unifiers and incubators.

An accelerator of France's attractiveness and the tourism development of its regions

Major international sporting events (MISE) must **showcase France's attractiveness**, both in terms of tourism and economy, a goal clearly achieved by Rugby World Cup. Of the 425,000 international visitors who came to France for Rugby World Cup 2023, 82% plan to return for a visit. The event created a significant tourism trickle-down effect in non-host regions due to its unique features (length of the competition, off-peak season timing, distribution of matches across France, visitors' purchasing power).

MISE are emblematic of **an attractive France and an iconic destination**. They are often highlighted by international investors, as observed at the Destination France summit in January 2024. Rugby World Cup 2023 was watched for 1.3 billion hours worldwide and generated 4 billion impressions on social media. It also provided Business France and local authorities with the opportunity to host numerous events with business leaders and international investors.

A social and societal unifier

MISE have a societal goal, as President Emmanuel Macron emphasised during the opening ceremony of Rugby World Cup 2023: "the world knew our French flair, it will discover our French share, this art of sharing, conviviality, fraternity." The CSR policy was central to the actions of France 2023. The commitment to the inclusion of all audiences was notable, and the ability to organise a festive and secure event was commended by 98% of satisfied spectators.

MISE also offer a chance to bring those furthest from employment closer to job opportunities. Rugby World Cup 2023 developed training programs that benefited the 1,400 apprentices in the Campus program and the 4,400 volunteers. Lastly, the event played a unifying role in a society that some describe as "archipelago-like": 1 million fans from around twenty different cultures, over 4,000 volunteers from all walks of life, more than 2,300 free events, a quarter of which took place outside the host regions.

An incubator of sustainable solutions, which will improve the sobriety and eco-responsibility of future MISE

MISE can be an accelerator of France's ambition to become Europe's leading sustainable tourism destination. To achieve this ambition, France can capitalise on organisational know-how and an existing infrastructure, the commitment of all public and private stakeholders, as well as low-carbon electricity production. For a long time, MISE have been a privileged opportunity to adopt eco-responsible gestures. Rugby World Cup 2023 enshrined the use of public transport for the movement of spectators in cities. Almost half of the spectators used them, sometimes by testing sustainable solutions, such as free bikes to join the stadium from the city centre in Bordeaux.

However, **Rugby World Cup 2023 should also have been exemplary in all aspects of environmental impact, even though the organisers are facing contradictory injunctions**: more host cities and metropolises, more spin-offs, less carbon, affordable tickets, economic balance, global influence...

This report identifies and quantifies the impact of three lines of thought, which aim to reduce the carbon impact with a constant economic impact. They focus in particular on the main source of emissions, visitor transport (94% of the event's carbon footprint):

- Prioritise European spectators during the sales phases in order to limit emissions related to long-haul air transport (18% reduction in GHG emissions from the event),
- Optimise transfers between matches, for example by organising all the matches in a group within the same cluster (-3%),
- Minimise air connections by prioritising cities that are easily accessible by train and ensuring direct services between the host city and metropolis and the host team's country (between -1% and -2%).

As it has done in the political, industrial and cultural fields, France has all the cards in hand to set a new standard of environmental and social excellence to which all the organisers of major international sporting events will refer for decades to come. Destination France also has many fans and practitioners of all sports, and places of conviviality to celebrate victories in safety... and forget defeats!

* Jérôme Fourquet, *L'Archipel français*, 2019

Source: Online survey of 11,121 ticket holders (November 1 - 26, 2023), EY analysis

Key figures of Rugby World Cup 2023 (competition)

Summary


20
teams, i.e. 660 players selected























51
competition days for 48 matches played



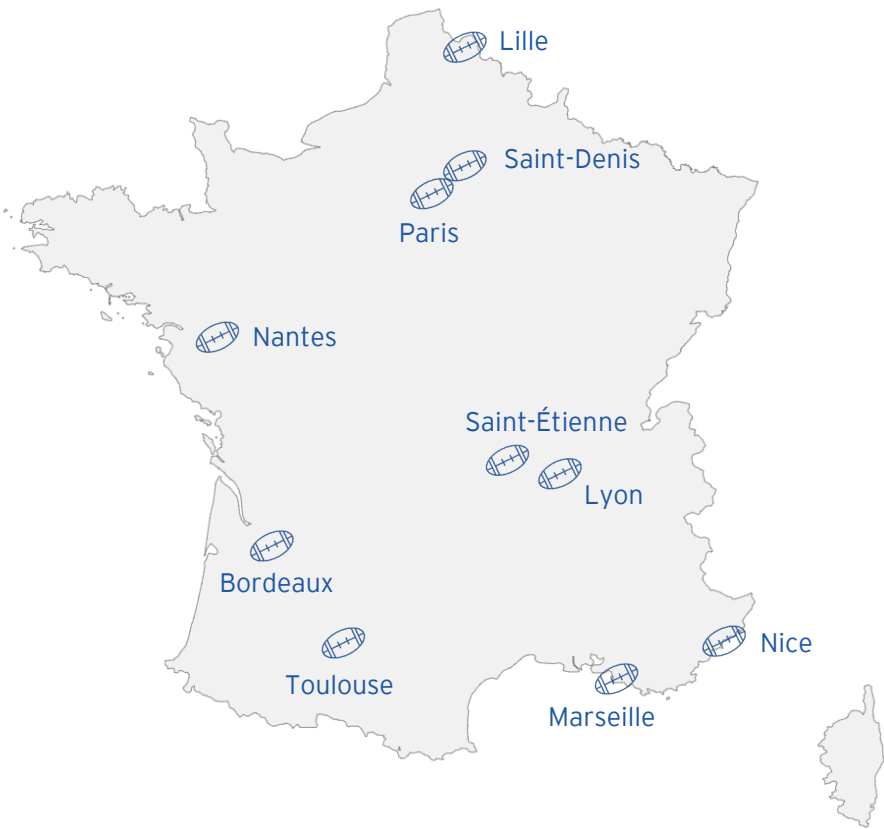
10
host cities and metropolises



The 20 teams of the tournament

- | | |
|--|---|
|  South Africa |  Italy |
|  England |  Japan |
|  Argentina |  Namibia |
|  Australia |  New Zealand |
|  Chile |  Wales |
|  Scotland |  Portugal |
|  Fiji |  Romania |
|  France |  Samoa |
|  Georgia |  Tonga |
|  Ireland |  Uruguay |

The 10 host cities and metropolises



Sources: France 2023, World Rugby



Key figures of Rugby World Cup 2023 (spectators)

2.4

million tickets sold to 902K spectators



425K

international visitors coming to France during Rugby World Cup 2023, spectators and accredited individuals combined



1.6

million visitors in the 9 fanzones (excluding Lille)



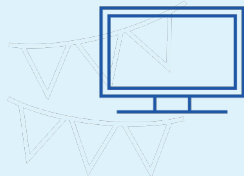
98%

of international fans came to France specifically for Rugby World Cup



1.3

billion hours watched by games

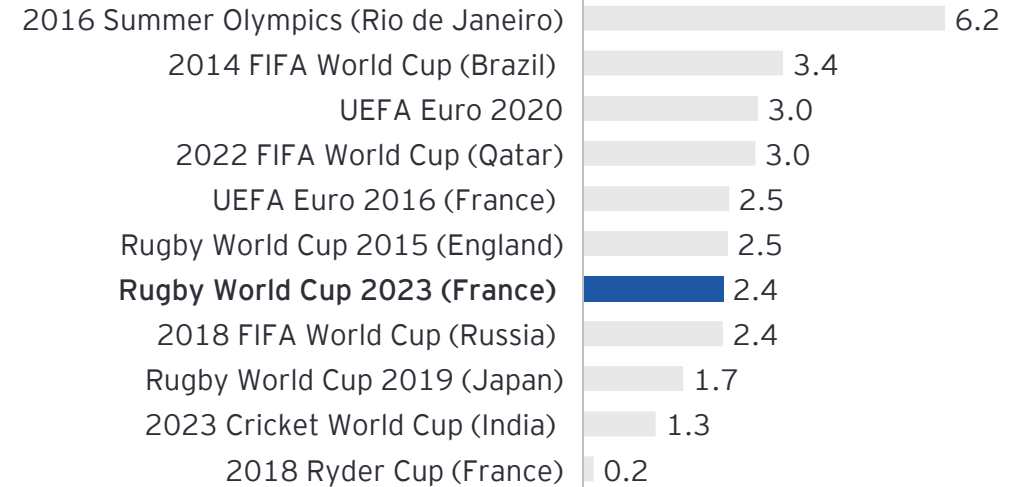


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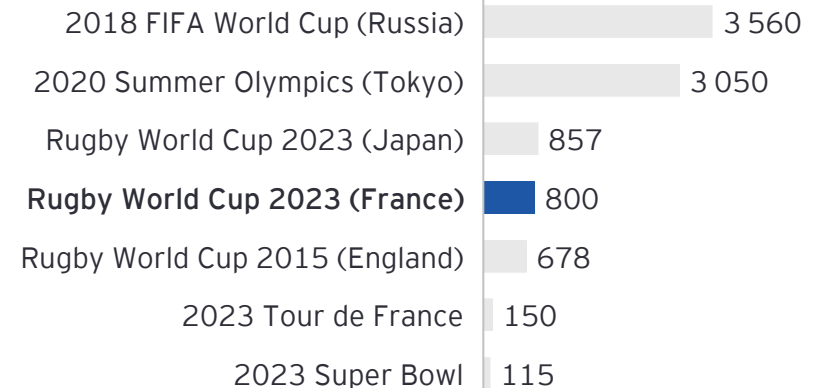
billions of impressions on social media, more than any other rugby competition



Number of tickets sold, in millions (non-exhaustive list of MISE)



Cumulative global TV audiences, in millions (non-exhaustive list of MISE)



Key figures from the economic, social and environmental impact study

Economy

1.8 Bn€



the total spending associated with the RWC 2023, regardless of the origin or location of expenditures

39%



of tourism spending by spectators benefited territories that did not host a match

871 M€



total economic impact, including €690m direct economic impact

84 M€



of additional tax revenue collected for €70m of public expenditure, i.e. a positive balance of €14m

98%



of international spectators are satisfied with their stay and 82% think the event made them want to return to France

4.2 M



overnight stays generated by international visitors who came specifically to France for the competition

1st



award of the government label "Terrain of equality" to France 2023 for its action in favor of inclusion and equality

160k



beneficiaries of social programs set up by France 2023

~7k



volunteers mobilised during the event, including 4,400 by France 2023

Environment

830 ktCO₂



the carbon impact of the event, 94% of which is related to transport

82%



of Rugby World Cup 2023's carbon emissions are attributable to air transport

53%



of spectators would like an organiser of a sporting event such as RWC 2023 to reduce its environmental impact

Source: Online survey of 11,121 ticket holders (November 1 - 26, 2023), EY analysis



Summary



1
Economic
impact

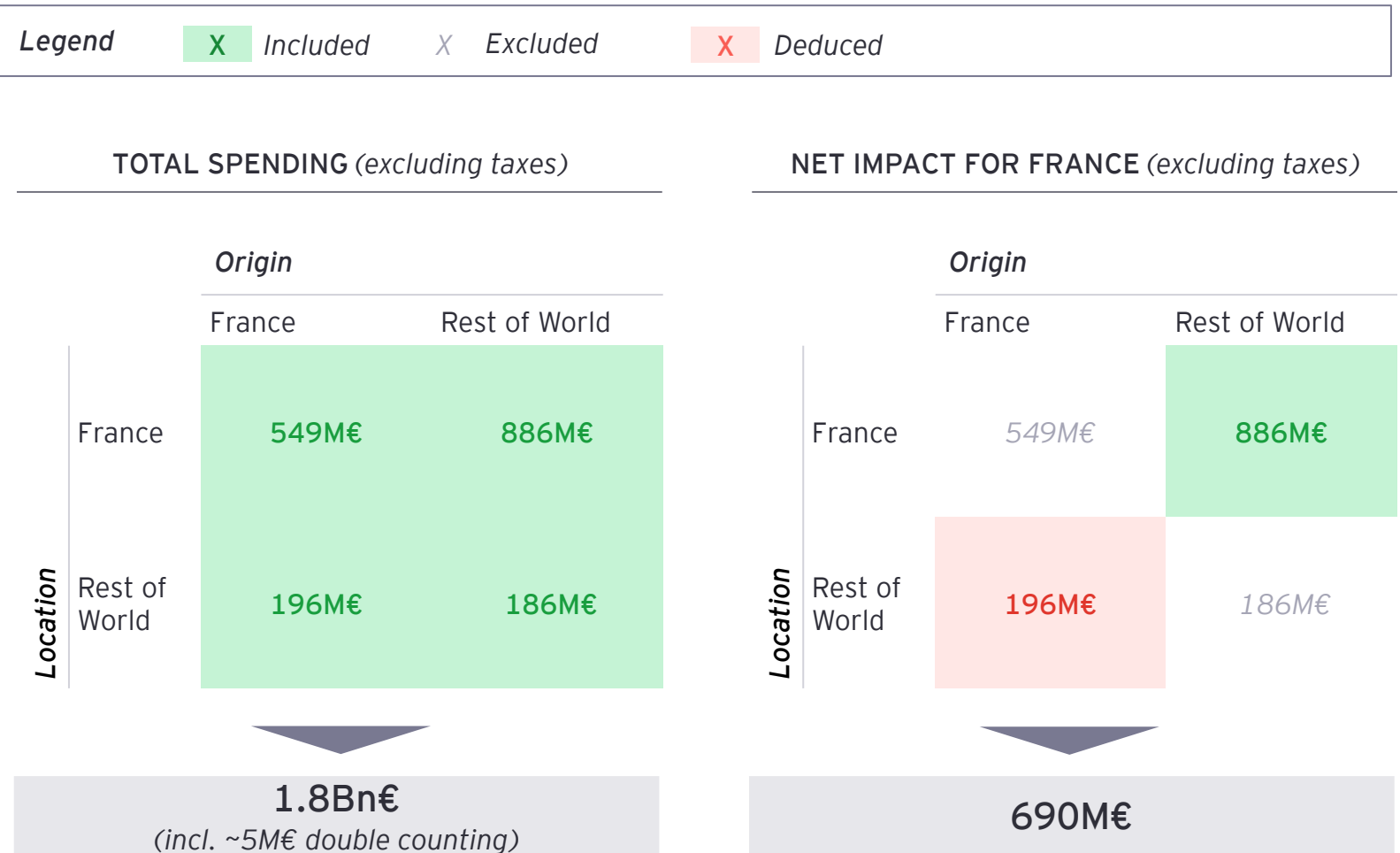
Rugby World Cup 2023 generated 1.8Bn€ total spending, resulting in a 690M€ net impact for France

In total, Rugby World Cup 2023 generated a **1.8Bn€ direct spending** (excluding taxes). This is the result of the expenditures directly associated with the RWC 2023 from visitors, France 2023, World Rugby, commercial partners and public authorities.

These expenditures result in a **690M€ net impact for France**, following the French Ministry of Sports' methodology. This second figure accounts for the net flows entering France as part of the event. In concrete terms, net impact is the addition of international financial flows associated with the event, minus financial flows from French to foreign entities.

Those two figures exclude taxes (VAT, tourist tax...).

Figure 1: Total spending and net impact for France from the RWC 2023, in M€

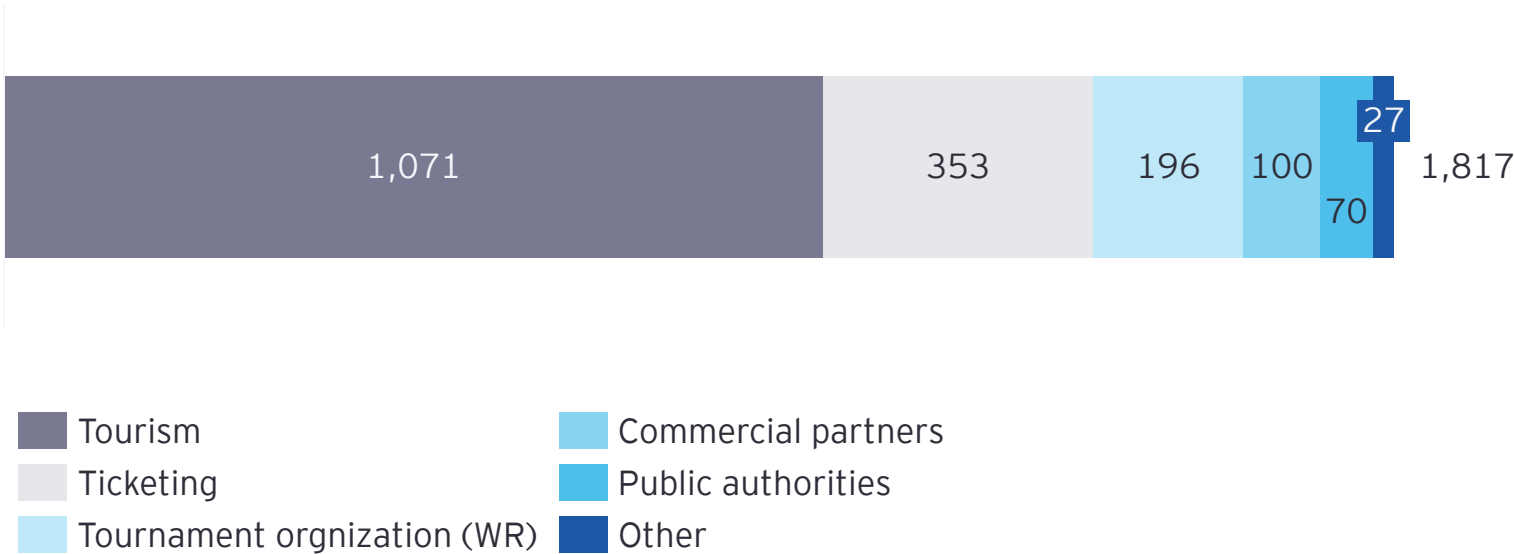


Tourism expenses account for two thirds of the total spending generated worldwide by Rugby World Cup 2023

Out of the 1.8Bn€ generated by Rugby World Cup 2023, nearly 1.1Bn€ came from the tourism-related spending of visitors in France. The distribution of spending depends on the origin of the spectators: Europeans account for 47%, non-Europeans for 35%, and French for 18%. The amounts vary according to the number of visitors, the duration of their stay, and their average daily spending.

Ticket sales account for just under 20% of total spending (353M€).

Figure 2: Split of total spending per activity, in M€, excluding taxes



Sources: Online survey of 11,121 ticket holders (1 - 26 November 2023), EY analysis

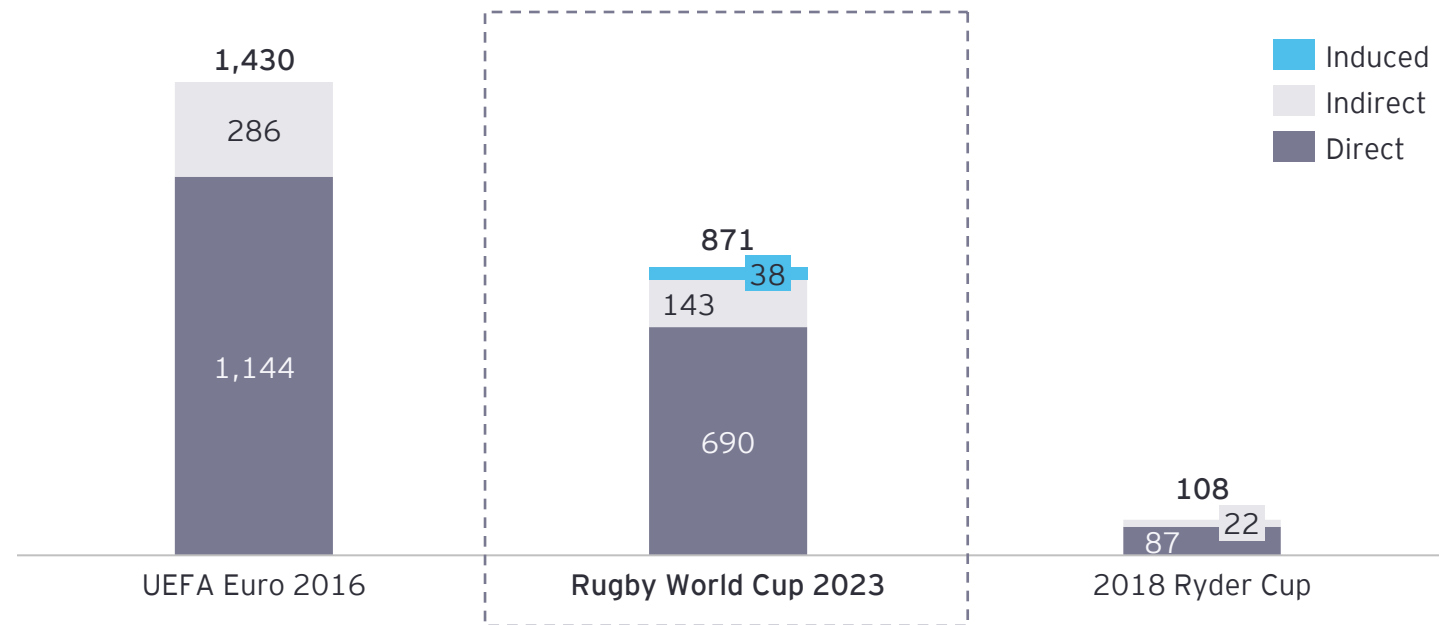
Rugby World Cup 2023 generated a total economic impact (direct, indirect and induced) of 871M€ into the French economy

The total economic impact (direct, indirect and induced) of Rugby World Cup 2023 in France amounts to 871M€.

This figure includes:

- The **direct economic impact** (690M€), which corresponds to the sum of the **injections** (i.e. financial flows entering the territory), minus **leakages** (i.e. flows leaving the territory).
- The **indirect or secondary economic impact** (143M€), which corresponds to the knock-on effect of the event on the rest of the French economy, i.e. the activity generated by the suppliers and service providers of the companies that benefited from the direct impact of the event (for example, caterers' suppliers).
- The **induced economic impact** (38M€), which corresponds to the activity generated by the consumption in the French economy of the wages received by people who worked directly or indirectly on the occasion of Rugby World Cup 2023.

Figure 3: Direct, indirect and induced economic impact of a selection of MISEs organised in France, in M€



Notes:

- For UEFA Euro 2016 and the Ryder Cup, the indirect economic impact was calculated using INSEE's MESANGE model, which estimates the multiplier effect of this type of event at 1.25. For Rugby World Cup 2023, an input-output model was used, resulting in a slightly higher multiplier (1.26).
- The comparison with the 2015 and 2019 RWCs cannot be made over the entire scope, as the methodologies used are significantly different.
- The results of previous studies have been updated to take inflation into account, so that expenditure can be compared in constant euros.

Although France 2023 achieved 100% of its operational expenses in France, the governance model of the event reduces the international economic impact

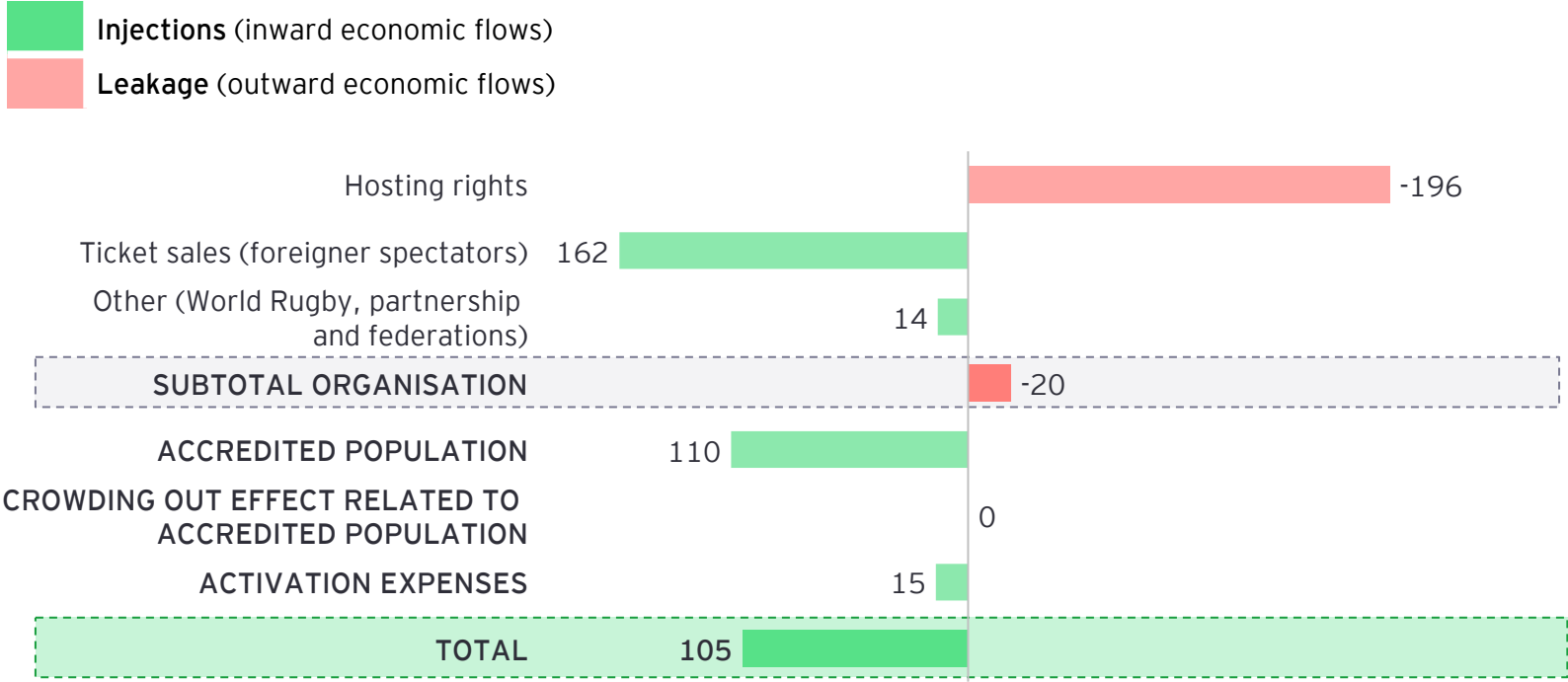
The net economic impact associated with organising the event amounts to 105M€.

This level, which is lower than that of other comparable events (558M€ for UEFA Euro 2016 for example), is mainly due to the way the event is organised*.

For Rugby World Cup 2023, the national organising committee (France 2023) buys the rights to host the tournament from World Rugby. France 2023 has also purchased the *Hospitality and Travel program*, an option offered by World Rugby. The purchase of the Hospitality program would have allowed France to be selected to host the event against South Africa and the Irish bid, according to interviews conducted as part of the study.

In the case of UEFA Euro 2016, UEFA is responsible for organising the event. This second model avoids outward financial flows (i.e. the rights paid by the national organising committee), but can result in a significant portion of operational expenses benefiting foreign operators. During RWC 2023, the proactive policy implemented by France 2023 led to less than 1% of expenses being spent on foreign suppliers (compared to 36% for UEFA Euro 2016), which helped to structure the event industry in preparation for the 2024 Olympic Games.

Figure 4: Summary of injections and leaks taken into account in the calculation of the net economic impact (excluding taxes) generated by the organisation of Rugby World Cup 2023 in France, in M€



Note: the data on organisational rights or the location of operational expenses were provided by France 2023, in their accounts dating from December 2023 (i.e., before final closure). EY has not audited this data.

**The difference observed with UEFA Euro 2016 is also explained by the methodology used in the calculation of the economic impact, which excludes spending in France by French economic actors. Thus, expenses incurred in France by a national organising committee are excluded, unlike expenses incurred within France by a foreign organising committee.*

Sources: Online survey of 11,121 ticket holders (1 - 26 November 2023), France 2023, EY analysis



International spectators at Rugby World Cup 2023 spent nearly 585M€ in France, but not all types of audiences contribute to it in the same way

In total, Rugby World Cup 2023 spectators and their companions generated an injection of 585M€ during their stay(s) in France.

Accommodation and food services accounted for more than half of tourism revenues. Rugby World Cup 2023 has provided a turnaround opportunity for these sectors, which have been hit hard by Covid-19, by improving their margins.

Not all types of public contributed in the same way to this injection:

- "Hospitality" spectators, who are often invited by a company, have the highest average daily basket (315€ per day and per person excluding ticketing and transport expenses to France), but represent a small part of the total tourist expenditure because the majority of them are French (82%) so not counted here, and stay for a shorter period of time than other audiences (5 days on average, v. 10 days for the general public),
- "Travel" spectators, who have bought their ticket from a travel agency, represent a significant part of tourism spending (27%) compared to their share of the public (17%) because their average daily spendings are higher than the general public, for a comparable length of stay (nearly 208€ per day and per person, v. 165€ for the general public).

Figure 5: Tourism economic injection generated for a selection of MISEs, by sector, in M€ and constant euros (adjusted for inflation)

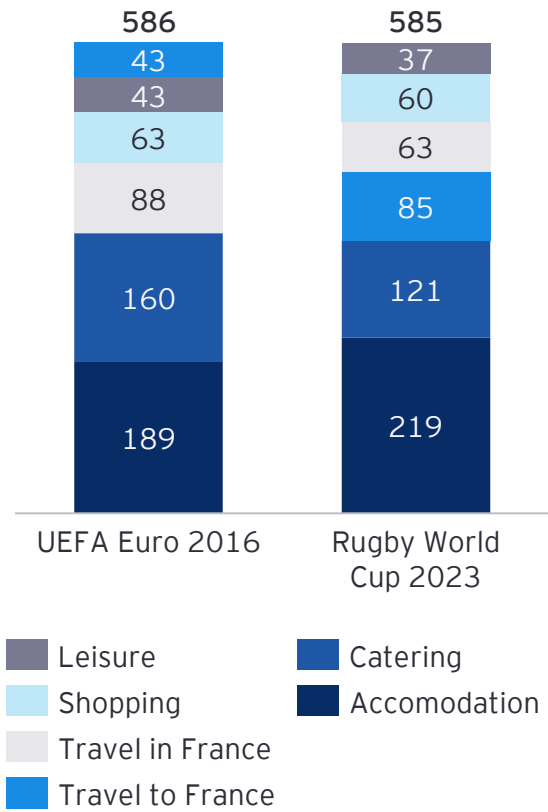
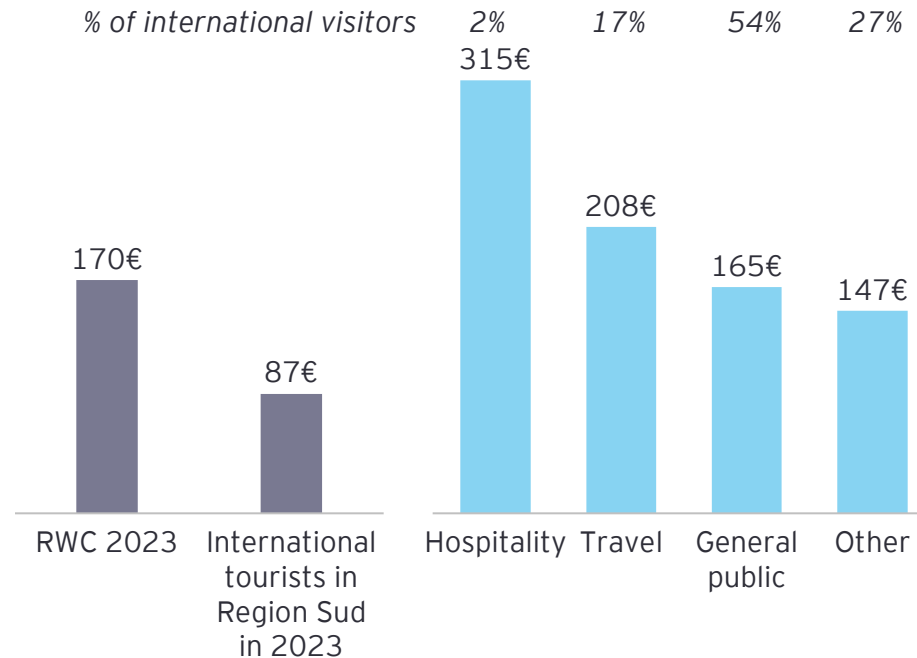


Figure 6: Average daily spending of international visitors excluding ticketing and travel expenses to France, by type of public, in €, including VAT



- Notes :
- The "Other" category includes, but is not limited to, non-ticketed companions, etc.
 - UEFA Euro 2016 results are presented in constant euros. They have been updated to take inflation into account so that they can be compared.
 - The average daily spendings are calculated without "occasional" visitors, i.e. from the 416,000 visitors who came especially to France for Rugby World Cup 2023.



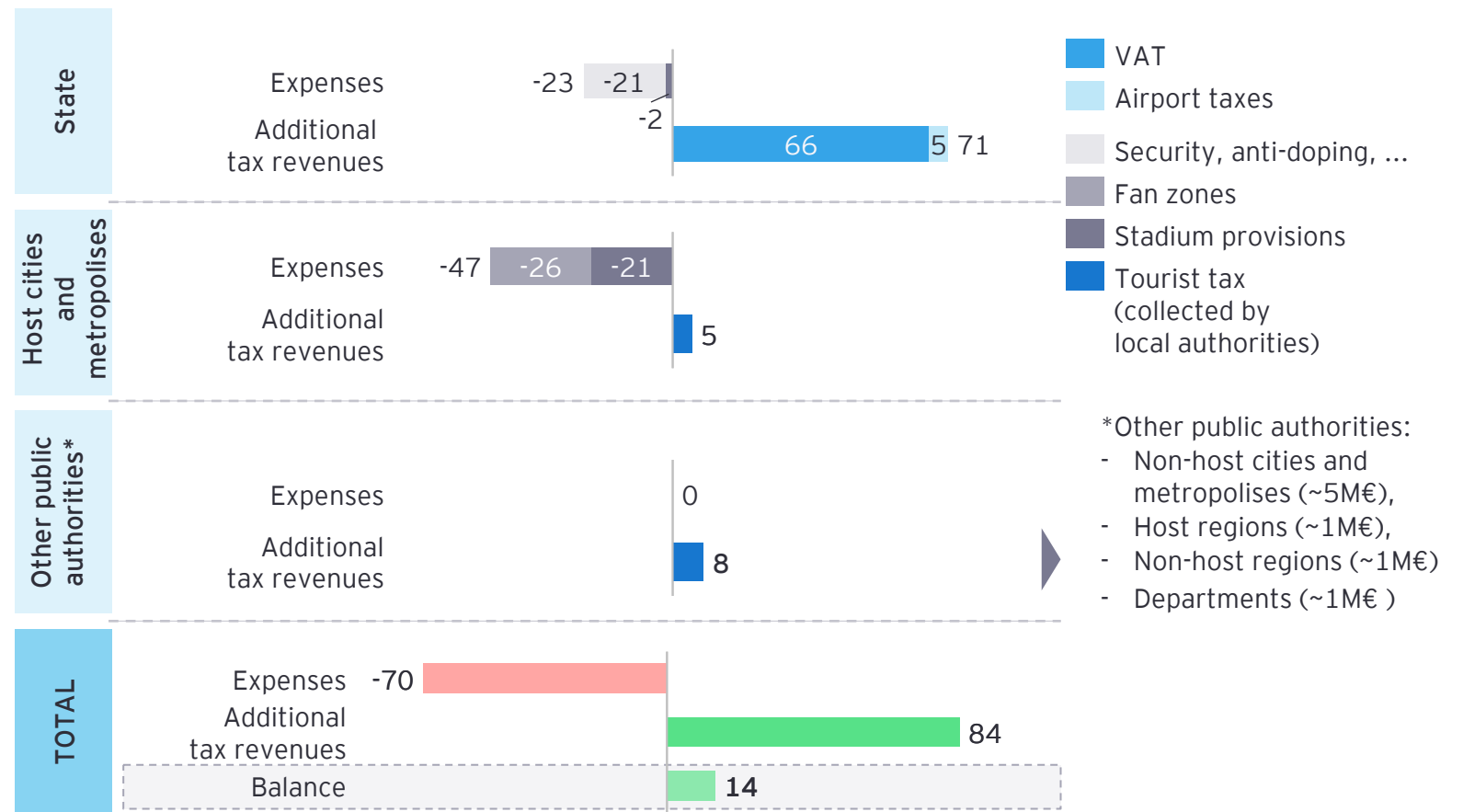
The tax revenues generated by Rugby World Cup exceeds the total expenses incurred by the State and local authorities to host the event

Including benefits in kind (security, provision of stadiums), nearly 70M€ were committed by the public authorities for the organisation of the event, and nearly 84M€ in additional tax revenue was collected (see 87M€ for UEFA Euro 2016, in constant euros), i.e. a positive balance of 14M€.

It is likely that this balance is actually lower, as this calculation does not take into account the time spent by the teams of the different communities for the organisation and communication of the event. However, this balance varies widely depending on the type of stakeholder: while it is positive for the State and other local authorities, the balance sheet appears less positive for the host cities and metropolises, for which the additional tax revenues cover approx. 10% of the cost of hosting the event, and 25% of the expenses incurred (i.e. the cost of the fan zones, excluding the provision of the stadiums).

For the host cities and metropolises, the event's balance sheet is obviously not limited to tourist taxes - the tourist expenditure of international spectators and their companions represents 362M€ in these territories. In addition, the benefits are also social and societal. Rugby World Cup 2023 has played a unifying role in these territories, bringing people who are furthest away from it closer to event.

Figure 7: Additional costs and tax revenues (from international visitor spending only) associated with Rugby World Cup 2023, in M€



Note: the valuation of the costs for stadium provision is derived from the event's projected budget (2018) and does not account for inflation between 2018 and 2023 (approx. 14%). Thus, the actual value of this provision is likely higher than €21m.

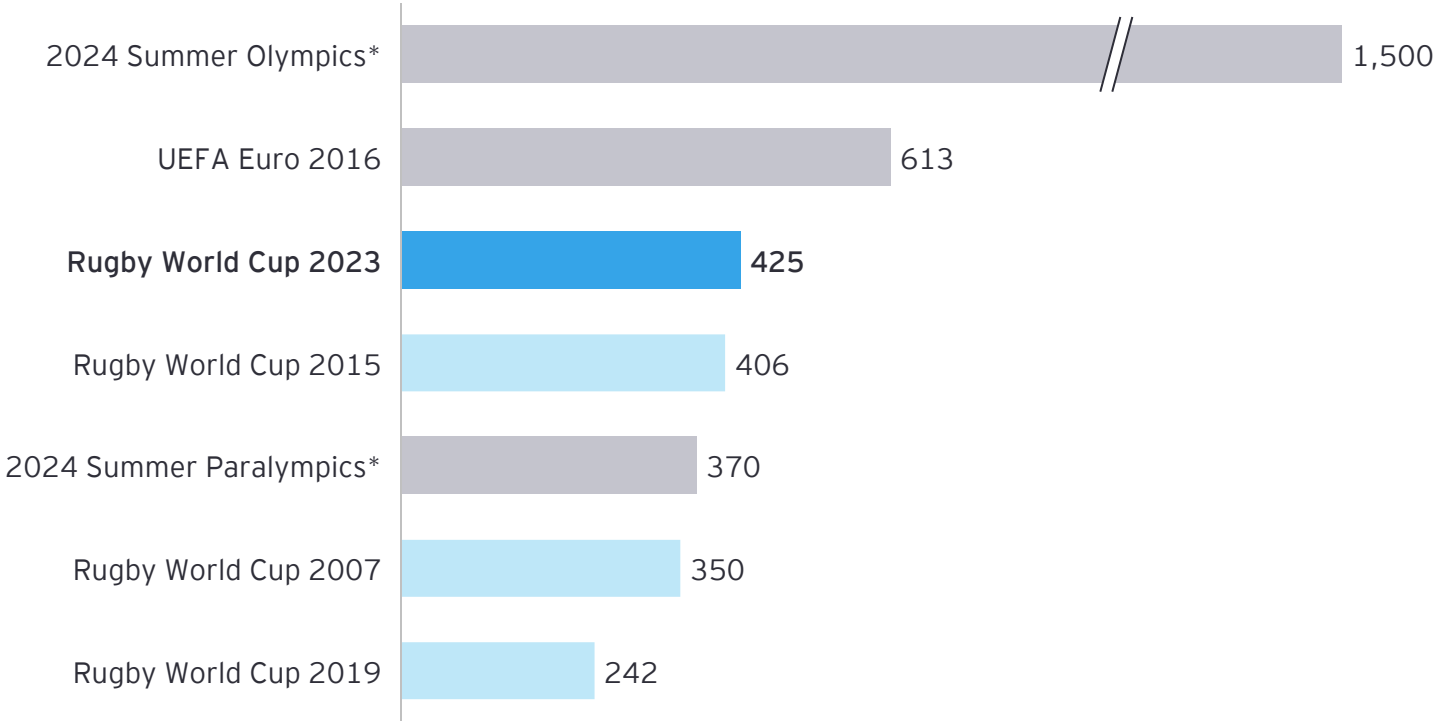
Rugby World Cup 2023 attracted 425,000 international visitors to France, i.e. about 75,000 more than in 2007, but fewer than the 613,000 welcomed during UEFA Euro 2016

Like UEFA Euro 2016, which hosted more than 600,000 international visitors, Rugby World Cup 2023 contributed to the international visibility of *Destination France*.

The event attracted 425,000 international visitors to France (compared to 631,000 French people who attended the competition as spectators, companions, or accredited personnel), which is slightly below what was expected in a cautious scenario of 433,000, but twice as many as the last Rugby World Cup in Japan. The gap with Japan is partly explained by the predominance of European teams in the competition (40% of the participating teams and 75% of the international visitors).

Rugby World Cup 2023 has also helped attract nationalities to France that had been less frequent since COVID-19. According to Atout France (France’s National Tourism Development Agency), although they still lag behind the 2019 levels, the number of arrivals of Japanese visitors significantly increased with the Rugby World Cup 2023 (-39% vs -57% from January to August 2023).

Figure 8: Number of international visitors welcomed to several major international sporting events, in thousands



*For the 2024 Summer Games, the figures shown are forecasts.

- Rugby World Cup 2023
- Rugby World Cup (excluding World Cup 2023)
- Other Major International Sporting Events (MISE)

Sources: France 2023, Impact study of the 2015 & 2019 Rugby World Cup (EY), Impact study of UEFA Euro 2016 (CDES), Organisation of the Men's Rugby World Cup in 2023 (IGF), Economic impact study prior to France's bid for Rugby World Cup 2023 (Deloitte), Paris Tourist Office, EY analysis



On average, international visitors who came to France for Rugby World Cup 2023 spent twice as much as regular international tourists

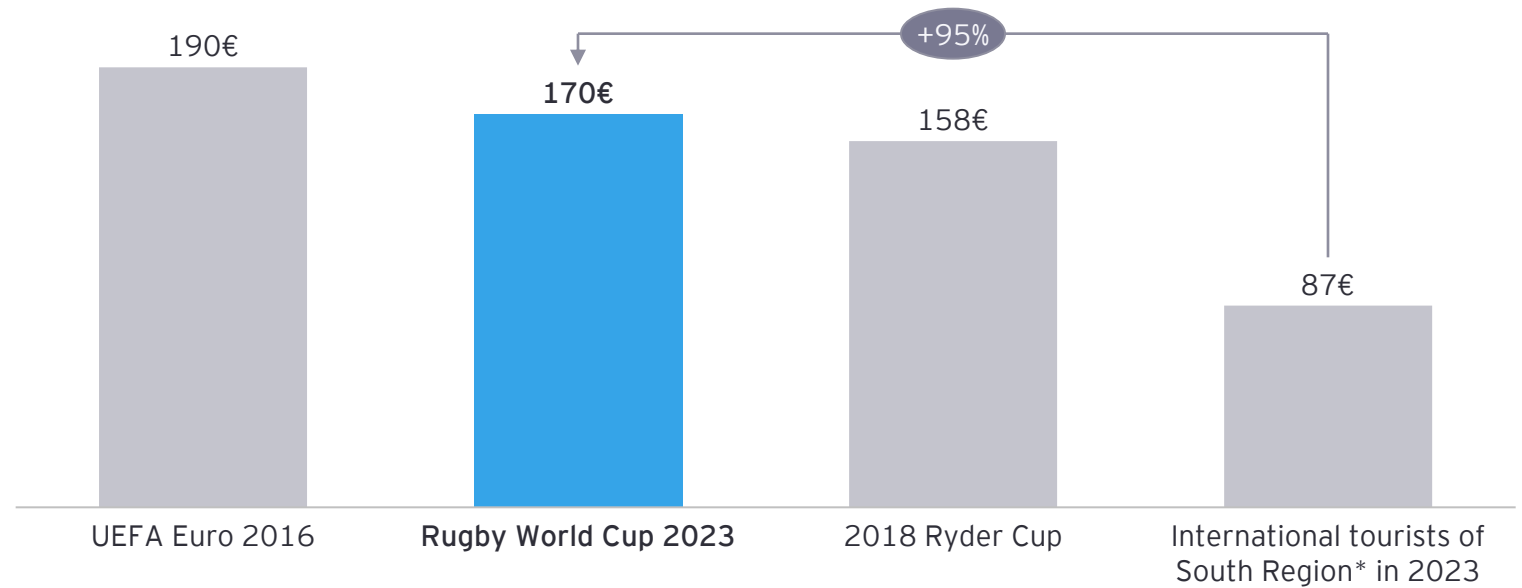
On average, during Rugby World Cup 2023, international visitors spent 170€ per day per person, excluding ticket spending and transportation to France.

By comparison, this amount is nearly twice as high as the spending by a international tourist in *Region Sud* in 2023¹.

Several factors account for this difference:

- **Socioeconomic profile of Rugby World Cup 2023 spectators (and more broadly, of major sporting events):** 65% of international spectators attending a Rugby World Cup 2023 match belonged to upper socioeconomic classes, compared to 47% of tourists in the Provence-Alpes-Côte d'Azur region in 2023.
- **The exceptional nature of the event**, which might lead some spectators to spend more than they would during regular holidays.

Figure 9: Average daily spendings per international visitor, excluding ticketing and transport to France, in constant euros (adjusted for inflation) and including tax



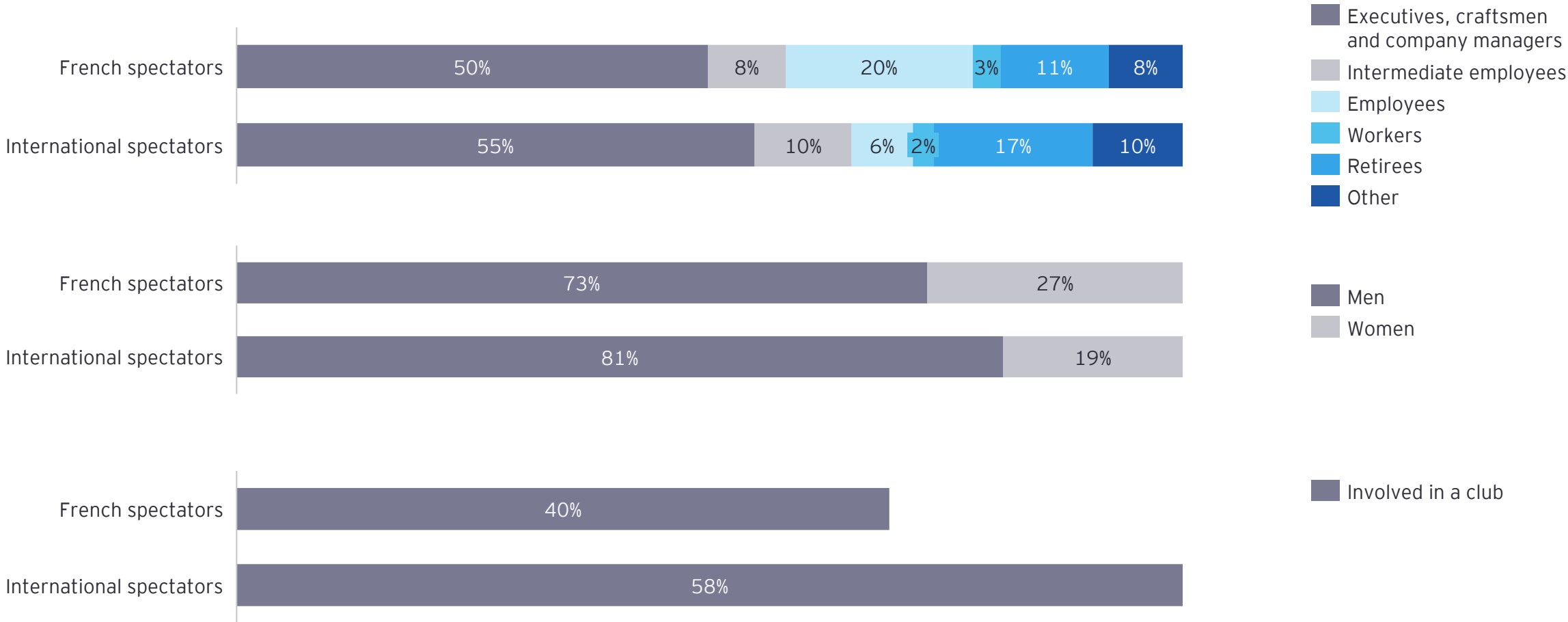
*South Region refers to the Provence-Alpes-Côte d'Azur Region in France.

¹ Unfortunately, no such data exist at the level of national accounts. This is a pitfall already identified by the CDES as part of the UEFA Euro 2016 impact study.

Note : The results of previous studies are presented in constant euros. They have been updated to account for inflation, allowing for a more accurate comparison of the economic impact. Additionally, data on the average spending of international tourists by nationality is not comparable with our figures due to methodological differences.

Overall, international spectators are rugby passionate, predominantly executives or retirees with a high purchase power, when local spectators are a little more diverse

Figure 10: Professional occupation, sex and involvement in a rugby club of French and international spectators



Sources: Online survey of 11,121 ticket holders (November 1 - 26, 2023), EY analysis



Nearly 40% of tourism spending benefited areas that did not host any matches, demonstrating the significant spillover effect that major sporting events can create

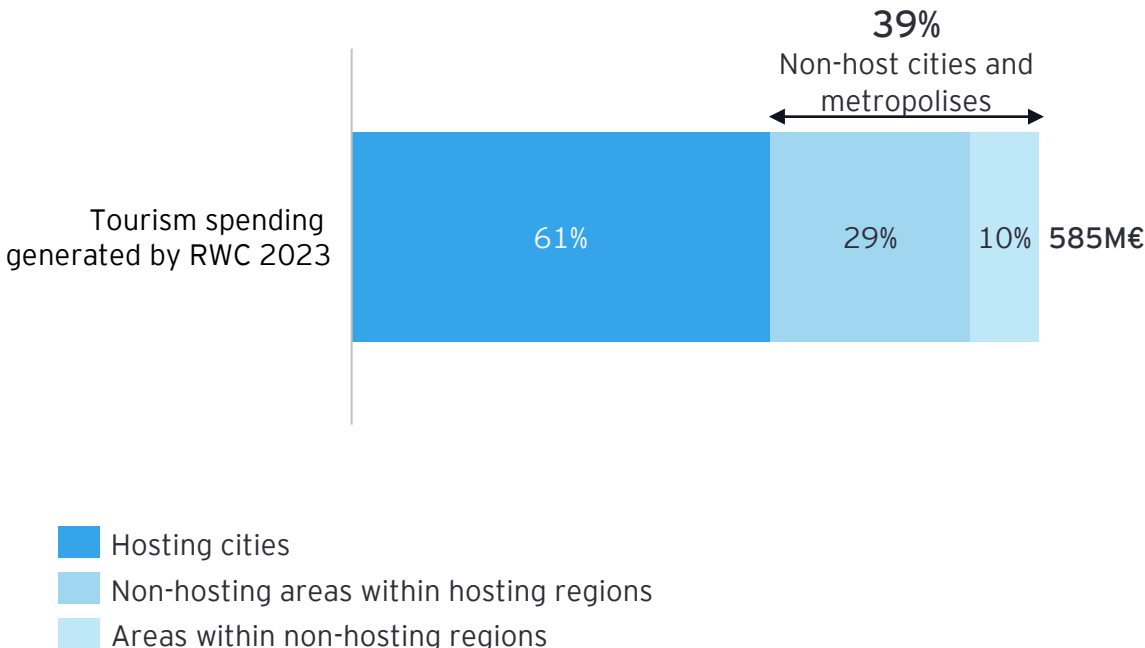
With nearly 40% of tourism spending and 1.6 million overnight stays outside the host cities and metropolises, Rugby World Cup 2023 benefited the entire country.

Overall, more than a third of spectators spent at least one night outside host cities and metropolitan areas. This level is notably high—in 2016, only a quarter of UEFA Euro 2016 spectators stayed at least one night outside host cities.

Several factors contributed to enhancing the spillover effect typically seen with major sporting events:

- A "sporting" factor, where the gap between two matches can encourage visitors to extend their stay in France to attend a second match of their team;
- France 2023's vision of a "World Cup for all regions," with base camps spread across France, allowing supporters to stay in these areas.

Figure 11: Distribution of tourism economic impact generated by Rugby World Cup 2023 (international spectators only), by type of areas



Note: Only spending by international visitors coming specifically for Rugby World Cup 2023 has been taken into account in the calculation of the economic impact generated by the competition.

Source: Online survey of 11,121 ticket holders (November 1 - 26, 2023), EY analysis



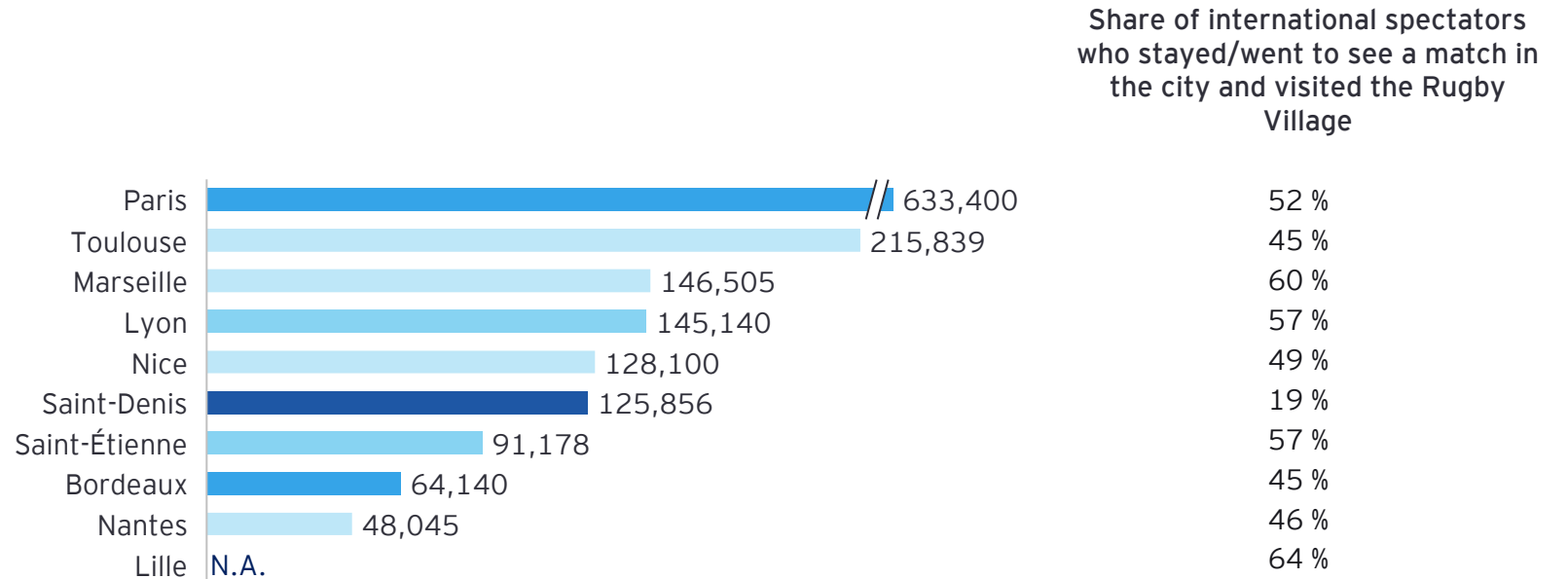
In the host cities and metropolitan areas, Rugby Villages became important gathering and entertainment spots, especially for international spectators

Almost one in two international spectators attended a Rugby Village during their stay. Overall, more than 1.6 million people visited the Rugby Villages during Rugby World Cup 2023 in France, compared to 1.1 million in Japan in 2019.

These positive figures are due in part to the excitement surrounding the French team's performances, the positive image of Rugby World Cup and the sport itself, and particularly sunny weather for the season, along with a wide range of activities. The high participation rate among international visitors can also be attributed to the fact that Rugby Villages provide a place where they can find fellow supporters to watch matches with.

According to a survey conducted by *Territoires d'Évènements Sportifs*, the main reason people visited Rugby Villages was to participate in sports activities (50%), followed by the opportunity to watch a match with other fans (49%), and eating or having a drink (38%).

Figure 12: Attendance at Rugby Villages during Rugby World Cup 2023, in number of visitors



- **"Fan zone" villages**, offered match broadcasts and the possibility to consume food and beverage on-site, thanks to the installation of dedicated drinks/food areas.
- **"Family" villages**, provided a variety of playful activities primarily designed for children
- **"Mixed" villages**, with designated areas for families with limited capacity and the possibility to expand into larger spaces during major matches.
- **"Open" villages**, located in the city centre, close to tourist areas, inherently integrating local shops and restaurants.

Note: Due to a lack of data, the Lille Rugby Village was not included in this count.

2

*Environmental
impact*

Over 830ktCO₂eq. were emitted as part of RWC 2023, of which 86% come solely from international visitors' and participating teams' transport from their home to France

Rugby World Cup 2023 generated nearly 830ktCO₂eq., which is the average annual carbon footprint of more than 90,000 French people.

Travel-related emissions account for 94% of the emissions generated by the event. This figure includes the emissions from transporting teams and international visitors to France (713ktCO₂eq.) as well as all emissions from travel between and within cities (adding up to 65ktCO₂eq.).

Visitor accommodation is the second largest source of emissions after transport (30ktCO₂eq, or 4% of the total). Calculated per night, this estimate includes emissions related to energy consumption, intermediate purchases (like laundry and breakfast at hotels) and buildings operations.

Match viewing accounted for 2% of the total emissions (approximately 15ktCO₂eq.).

Catering (only in stadiums), merchandising (official products sold by France 2023) and infrastructure combined represented less than 1% of total emissions. Since no infrastructure was built specifically for the event, this category includes stadium energy consumption, waste management and consumables (like turf replacement and fertilisers).

Figure 13: Greenhouse gas emissions related to Rugby World Cup 2023 by item, in ktCO₂eq.



TOTAL: 830ktCO₂éq.

Catering: ~3
 Merchandising: ~2
 Competition venues: ~2

Sources: Online survey of 11,121 ticket holders (1 - 26 November 2023), ADEME, EY analysis



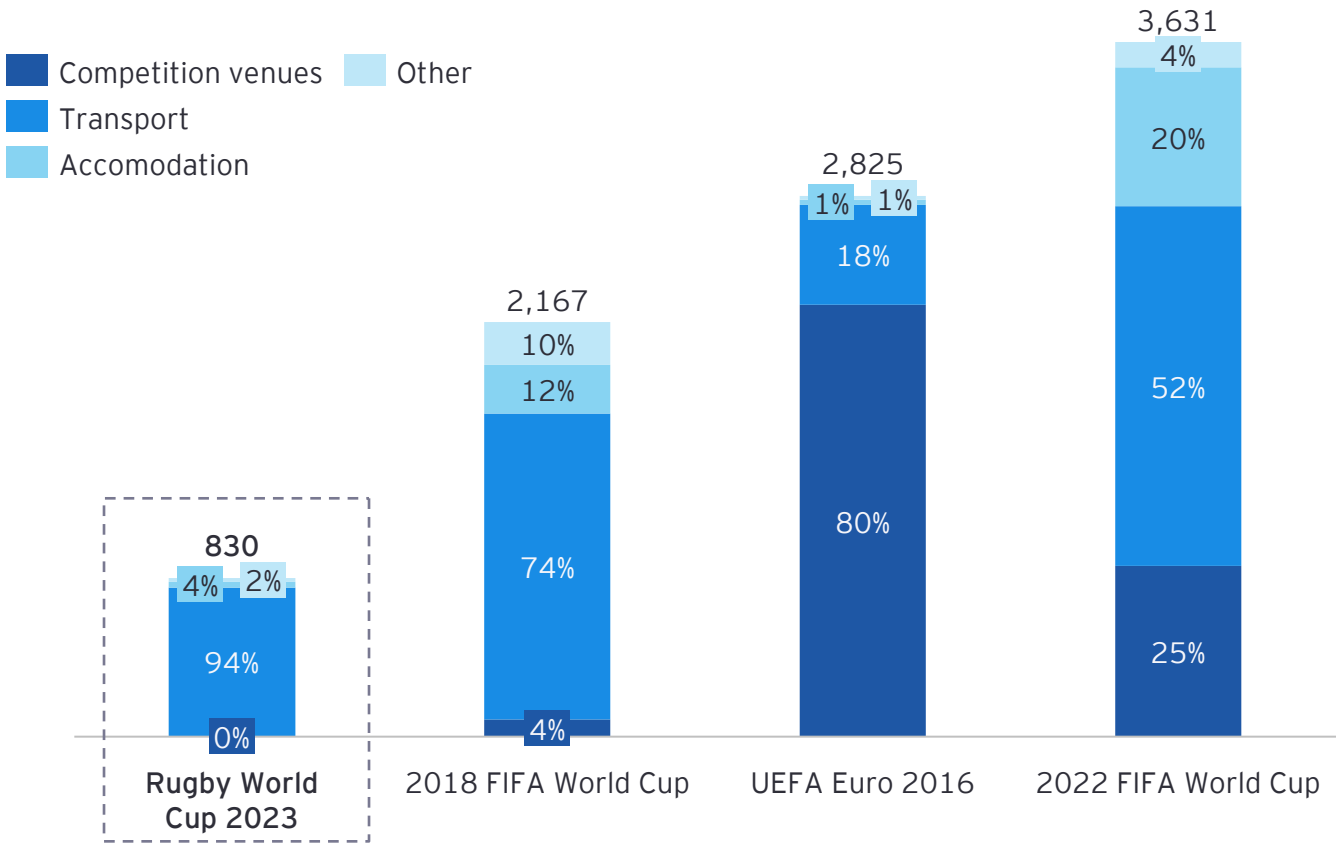
The GHG emissions associated with Rugby World Cup 2023 are 3.4 times lower than those of UEFA Euro 2016 thanks to the use of existing competition venues

Rugby World Cup 2023 generated 3.4 times fewer greenhouse gas emissions (830 vs. 2,825ktCO₂eq) compared to UEFA Euro 2016, and 4.4 times fewer than the 2022 FIFA World Cup in Qatar (3,631ktCO₂eq).

The event achieved a significant reduction in its environmental impact by using existing infrastructure, eliminating the need for extensive construction or renovation, which had been done for UEFA Euro 2016. As a reminder, for UEFA Euro 2016, 6 stadiums were renovated and 4 were newly built, which accounts for the substantial impact of infrastructure (80%) on its carbon footprint.

However, if we exclude emissions from building or renovating infrastructure, the carbon footprint of Rugby World Cup 2023 is almost 68% higher than that of UEFA Euro 2016. This increase is due to spectators making an average of 1.8 round trips compared to an estimated single round trip during UEFA Euro 2016. Moreover, these trips tended to cover longer distances, reflecting the global nature of the competition and the substantial presence of extra-European participants.

Figure 14: Greenhouse gas emissions from major sporting events by source, in ktCO₂eq.



Note : The methodologies used to measure the carbon impact of sporting events may differ. The carbon footprint of UEFA Euro 2016 does not take into account the accommodation and catering of visitors, but only of the teams. Similarly, it was assumed that visitors came to France only once, when they came an average of 1.8 times for Rugby World Cup 2023. The carbon footprint of the construction of the 2022 FIFA World Cup stadiums only reflects the days they have been used out of a potential 60 years of use, which tends to underestimate them considerably.

Sources : Greenhouse Gas Accounting Report - FIFA World Cup 2022 (SouthPole & ASTAD, 2021), Carbon Market Watch, 2018 FIFA World Cup Sustainability report, UEFA Euro 2016 Social responsibility and Sustainability report, online survey of 11,121 ticket holders (November 1 - 26, 2023), EY analysis



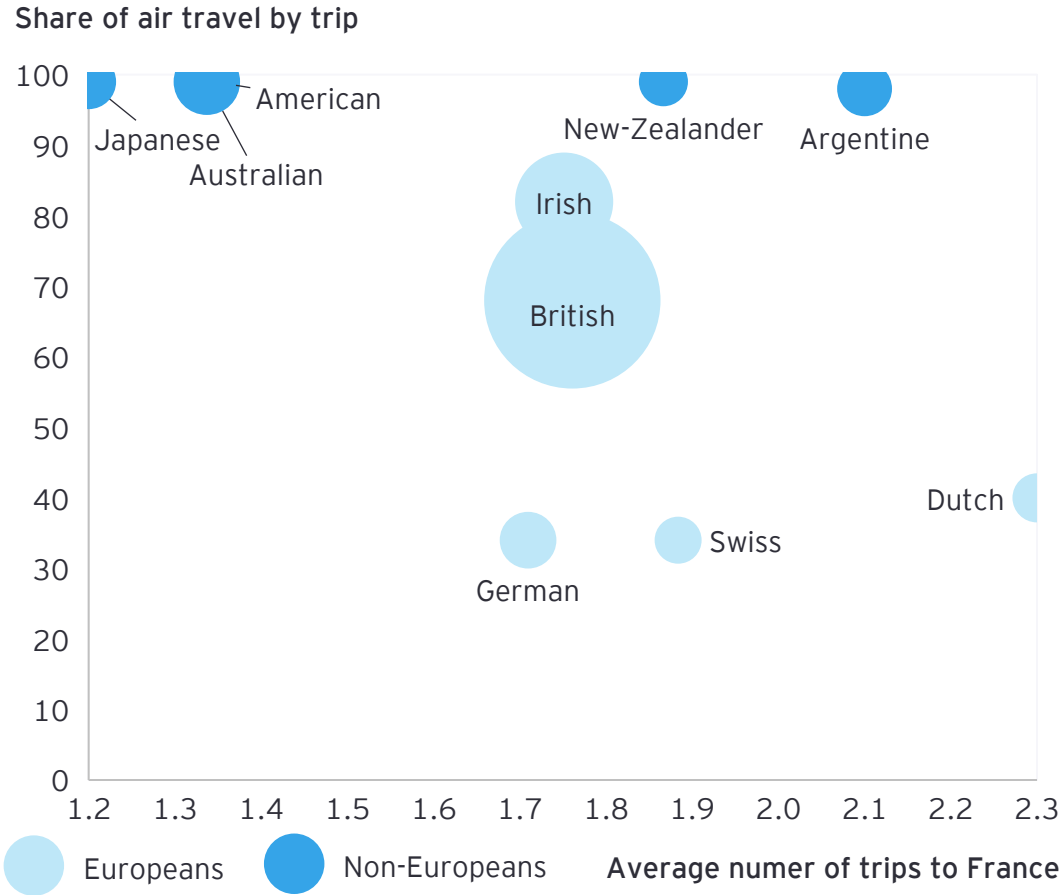
The gap between matches encouraged some visitors to stay longer, but also increased the average number of trips to France by visitor

The average number of trips to France is particularly high, including for European visitors, a logical consequence of the proximity of these audiences and the schedule of matches.

If this phenomenon is easily explained for neighbouring countries, it may be surprising for some much more distant clienteles, such as New Zealanders or Argentines, who came on average 1.9 and 2.1 times to France on the occasion of the event. Many of these fans seem to have returned to attend their teams' matches during the finals, no matter how far their country is from France (46% of them have come to France more than once).

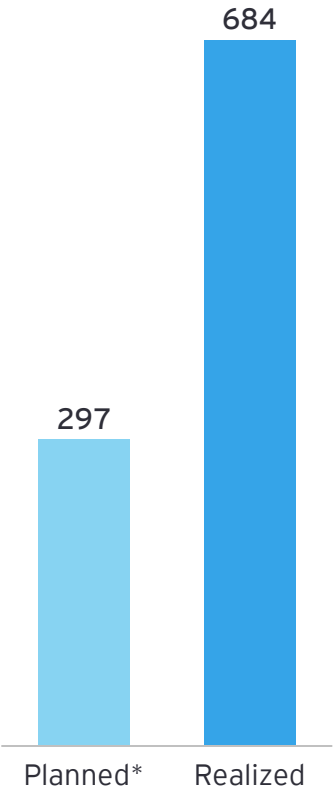
This phenomenon is the cause of much higher emissions than expected for the event: the carbon offset program of France 2023 provided for the compensation of about 300ktCO₂eq. related to air traffic of international passengers, v. 684ktCO₂eq realised. It should be noted, however, that the compensation program planned by France 2023 remains very ambitious.

Figure 15: Average number of trips to France and share of air travel in these trips, by nationality



Note: The size of the bubbles is proportional to the number of visitors.
 *Anticipated emissions under the carbon offset program.

Figure 23: Air traffic emissions from international visitors, ktCO₂eq.



Source: Online survey of 11,121 ticket holders (November 1 - 26, 2023), EY analysis



80% of the participating teams and a third of the audience come from island and/or non-European countries, which explains the share of air traffic (82%) in the event's emissions

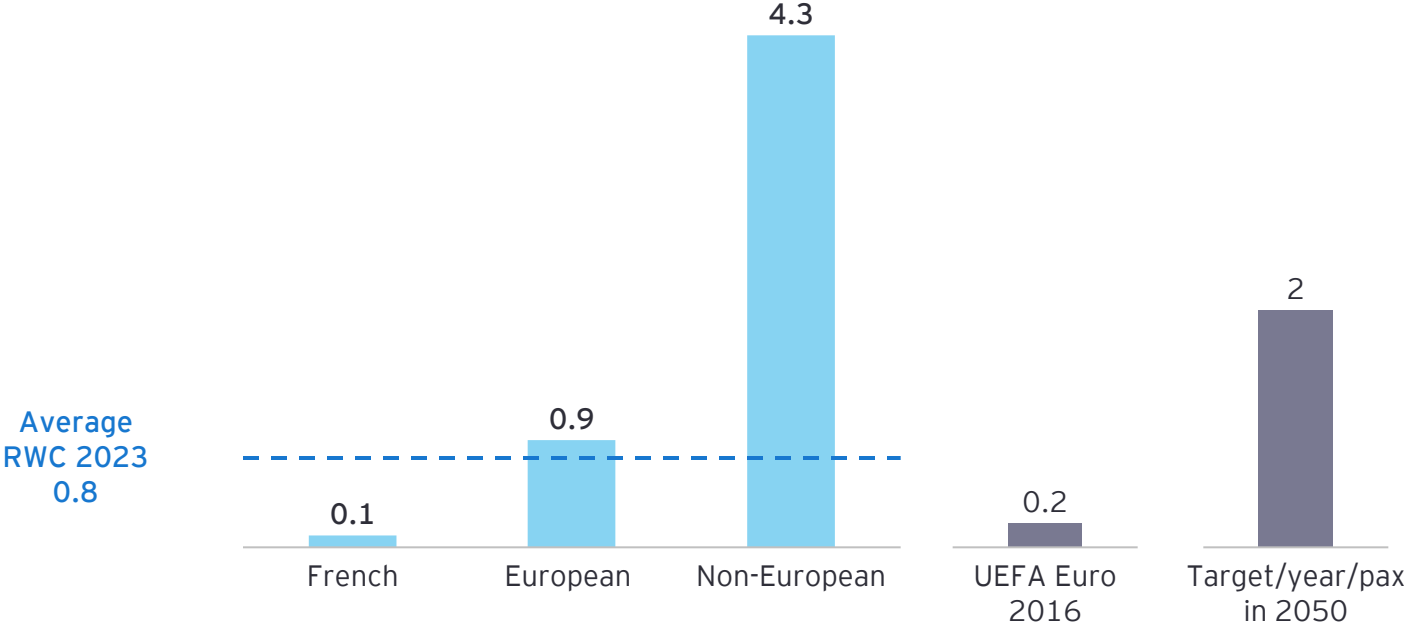
Travel is the largest source of greenhouse gas emissions for Rugby World Cup 2023, accounting for 94% of the carbon impact.

Air traffic alone is responsible for 82% of the competition's GHG emissions. This high level is due to the locations of the rugby nations: 80% of the teams and a third of the audience are based outside Europe or in island countries.

Consequently, the carbon impact of non-European visitors is four times higher than that of Europeans (excluding the French). Their travel-related emissions average 4.3 tCO₂eq, which is more than twice the individual annual carbon footprint targeted by the Paris Agreement for 2050 (2 tCO₂eq/year/person).

In total, non-Europeans make up 12% of visitors but account for 58% of the emissions.

Figure 16: Greenhouse gas emissions related to travel during Rugby World Cup 2023 per visitors, in tCO₂eq.



Source: Online survey of 11,121 ticket holders (November 1 - 26, 2023), EY analysis



Rugby World Cup 2023 emphasised the use of low-carbon mobility for in-city travel

84% of in-city visitor travel during Rugby World Cup 2023 were done using low-carbon mobility (public transport or walking), compared to 39% of the usual trips by the French population.

This high proportion demonstrates the potential role of major sporting events in promoting eco-responsibility; public transportation is more frequently used when it's harder to travel by car, which can lead to changes in certain habits. Major sporting events can also act as incubators, providing an opportunity to test large-scale mobility policies. For instance, Nantes introduced free public transportation on match days.

84%

of in-city visitor travel done via low-carbon mobility (public transport, walking or cycling).

Figure 19: Means of transport used by visitors of RWC 2023 for in-city travel, in % of respondents

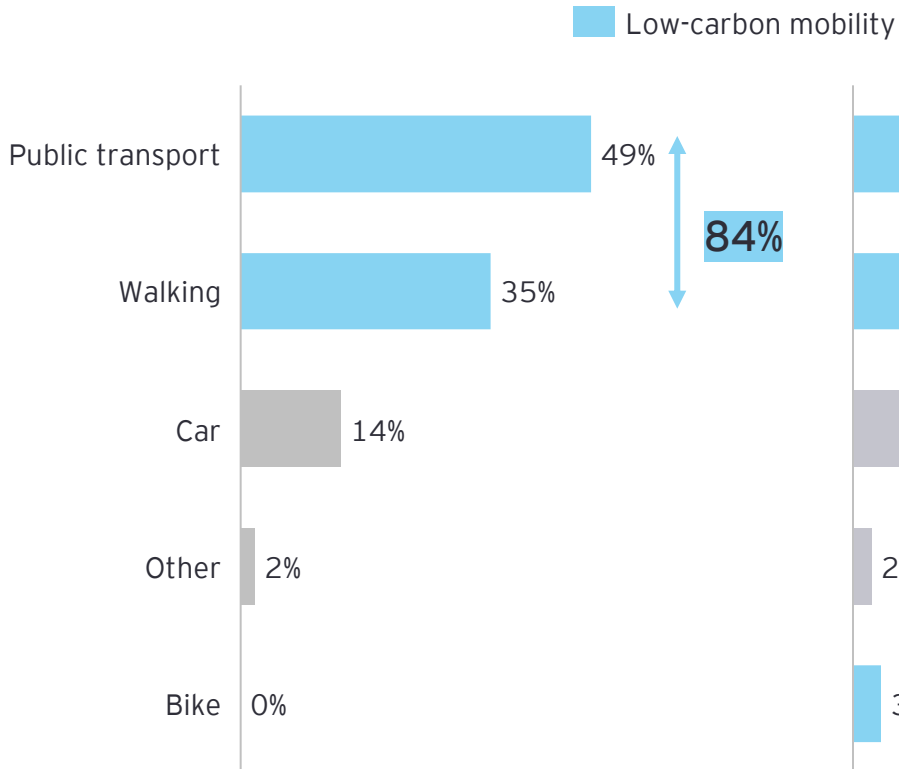


Figure 20: Means of transport of French people in urban areas with more than 100,000 inhabitants in 2019

France 2023's significant efforts to promote carbon-free travel were mitigated by the dispersal of base camps across the country and the match schedule

In partnership with SNCF, France 2023 implemented an ambitious low-carbon mobility plan for the teams, aiming to carry out 80% of their travel within France by train or bus.

Ultimately, 56% of the kilometres travelled by the teams were by train or bus.

The carbon footprint per player varied twofold depending on the team, influenced by factors such as the location of matches, the accessibility of the city where their base camp was located by train, and whether the team qualified for the knockout stages.

This outcome highlights the challenge of reconciling two contradictory objectives: ensuring that all regions benefit from the event, regardless of their accessibility by sustainable transportation, and minimising the event's environmental impact.

Indeed, the significant proportion of private jet flights is related to the deliberate distribution of the twenty base camps across various regions, in line with the concept of a "World Cup for all regions."

Figure 21: Distribution of kilometres travelled by the teams between cities, by means of transport

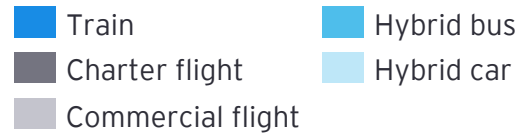
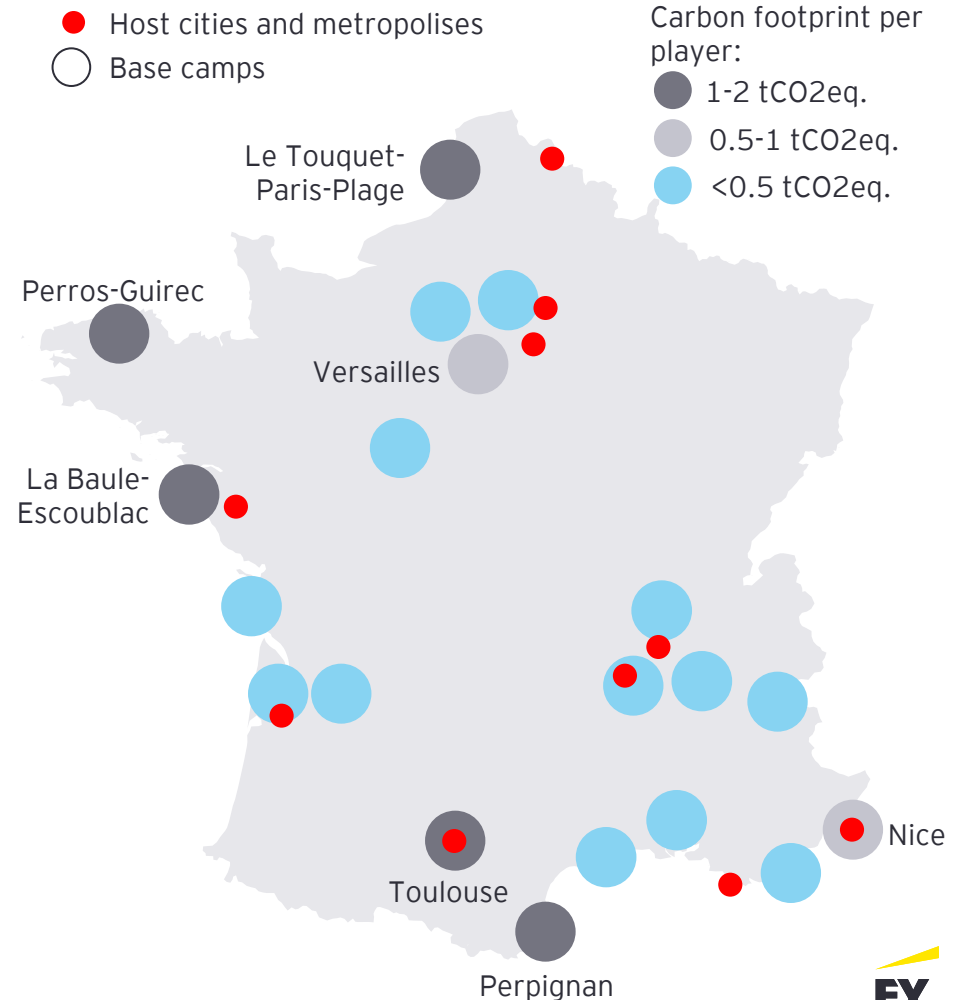


Figure 22: Team base camps during the group stages and carbon footprint per player related to travel between their team's cities



Excluding transport, other emission categories make up 6% of the event's carbon footprint, over which the organiser has limited control

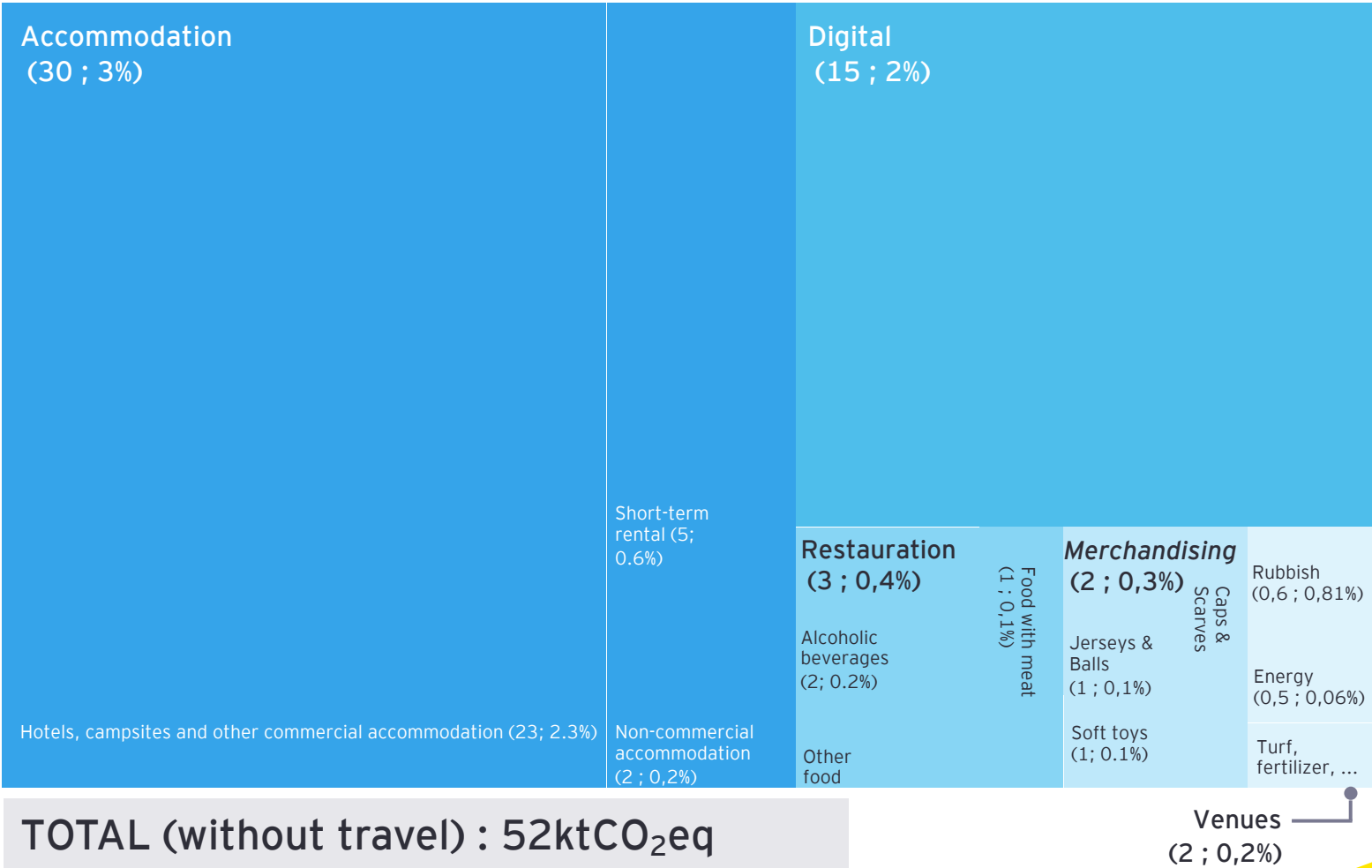
Apart from transportation, the other emission sources account for 6% of the carbon footprint of Rugby World Cup 2023.

Out of these 52ktCO₂eq, the scope for an organiser to make improvements is limited. It is difficult to reduce emissions related to visitor accommodation and watching matches, which together account for 5% of the carbon footprint.

Thus, France 2023 focused its measures to reduce the event's environmental impact on stadium catering, merchandising, and infrastructure. To achieve this, it implemented a responsible purchasing policy, waste reduction, sorting, and recycling, among other strategies.

While the potential for emission reduction in these areas is small, it's still achievable. Only 13% of the waste collected in the stadiums was recycled. Eliminating meat-based meals from stadiums could avoid 1ktCO₂eq, representing a 24% decrease in catering-related emissions. Selling only textiles manufactured in France could reduce emissions from merchandising by nearly 85% compared to products made in Asia.

Figure 23: Greenhouse gas emissions related to Rugby World Cup 2023 by categories (excluding transport), in ktCO₂eq and as a % of the overall carbon impact of the event



Source : EY analysis





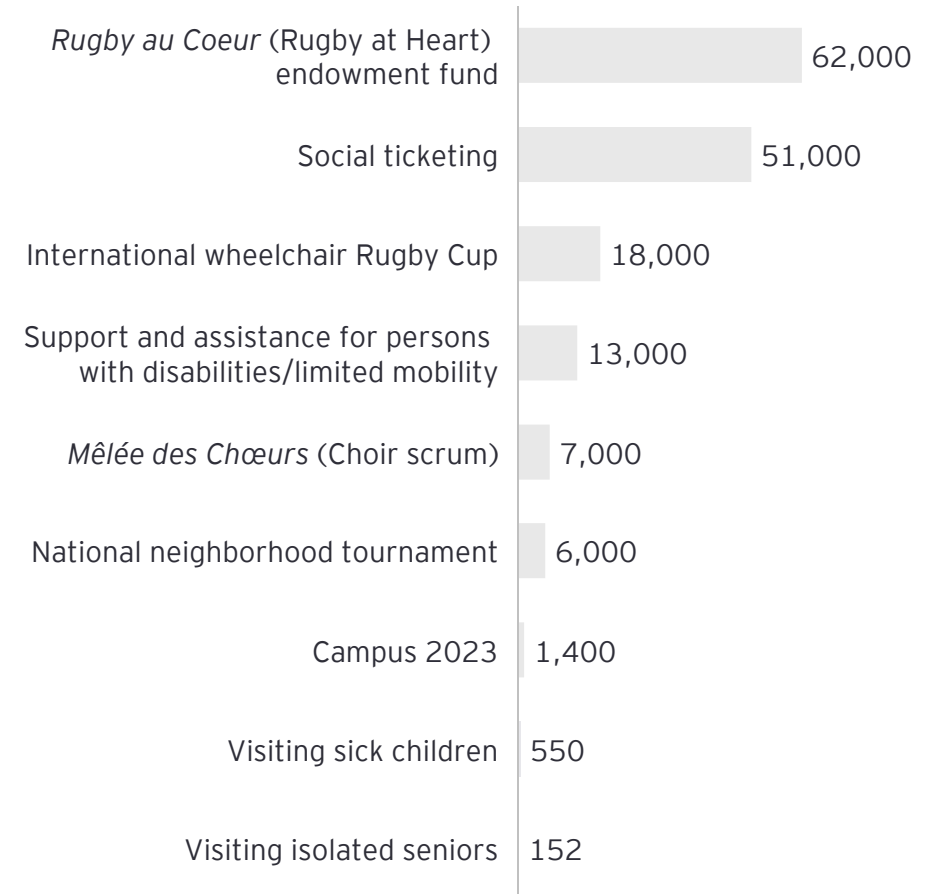
3

Social impact

Key figures related to social impact projects led by France 2023

<p>160K</p> <p>People have directly benefited from Rugby World Cup 2023 social programmes</p>	<p>12</p> <p>Projects set up by France 2023 dedicated to the social impact of the event</p>
<p>985K€</p> <p>The valorisation of the investment of the sponsors of the event in the social projects led by France 2023</p>	<p>9</p> <p>Official members, "non-commercial" partners of Rugby World Cup 2023 linked to social projects led by France 2023</p>
<p>1st</p> <p>Attribution of the 1st government label "<i>Terrain d'égalité</i>" (Field of equality) to France 2023 for its action in favor of inclusion and equality</p>	<p>210</p> <p>Projects supported by the <i>Rugby au Cœur</i> (Rugby at heart) endowment fund</p>

Figure 24: Number of direct beneficiaries of social impact projects led by France 2023



France 2023 has implemented around twenty social projects focusing on inclusion, education, training, and employment



Sources: France 2023, Rugby World Cup 2023 review (Ministry of Sports and Olympic Games, Nov. 2023), EY analysis



Rugby World Cup 2023 received significant media coverage, with record television viewership in France

According to World Rugby, Rugby World Cup 2023 in France was "the most watched of all time," with outstanding audio-visual and media performances. The tournament generated 3.1 billion impressions on social and digital media, more than any other rugby event.

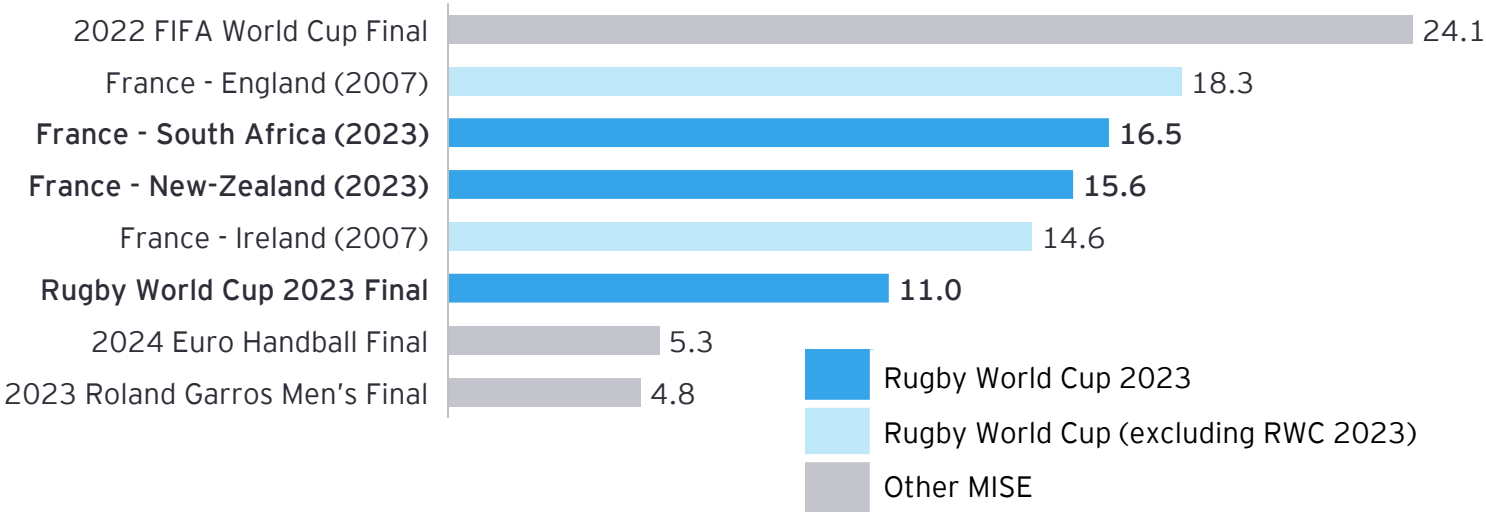
In total, the matches were viewed for a total of 1.33 billion hours, a figure exceeding the viewership from the previous two Rugby World Cups.

In France, 9 out of the top 10 TV audiences of 2023 were related to Rugby World Cup 2023. Cumulatively, over 230 million people followed the event on TF1, M6, and *France Télévision*.

Figure 25: Match viewing hours, in billions



Figure 26: Comparison of TV audiences for Rugby World Cup 2023 with other sporting events in France, in millions of viewers



Sources : World Rugby, France 2023, EY analysis



The excitement surrounding Rugby World Cup 2023 shows how passionate the French were about the event

The French were passionate about the event. According to a survey conducted by IFOP in October 2023, 65% of them watched at least one match of Rugby World Cup 2023. The league presidents interviewed believe that this enthusiasm was greater than in 2007. This feeling is attributed to several factors, such as the recent strong performances of the French national rugby team, which has players with whom the French can identify (like Antoine Dupont, Charles Ollivon, etc.).

Additionally, according to the French Rugby Federation, during Rugby World Cup 2023, no fewer than 200,000 French team jerseys were sold, surpassing the sales recorded during the previous edition in Japan, for all teams combined.

Rugby World Cup 2023 also demonstrated how, in a short period, sports can bring people together and foster connections. Eighty-three percent of the French who followed the competition said that the event was an opportunity to share and reconnect with family or friends.

40%

of French people who watched at least one match of Rugby World Cup 2023 were watching this competition for the first time. This figure is even higher among the youngest viewers (52% among 18-34 year-olds), and among women (46%).

Testimonies about the popular enthusiasm

"The excitement is clearly greater in 2023 than in 2007. You can feel the popular enthusiasm, the desire to share or celebrate. This might be related to the current social context or the restrictions experienced during Covid-19. »

President of a regional rugby league

"I feel like the entire population has fully embraced the World Cup. [...] We can see that even non-premium matches are drawing interest. »

President of a regional rugby league

"Since mid-August, everyone has been talking about rugby, learning the rules, and asking questions!

The demand for tickets and to be in the stadiums is growing stronger, regardless of which teams are playing. »

President of a regional rugby league

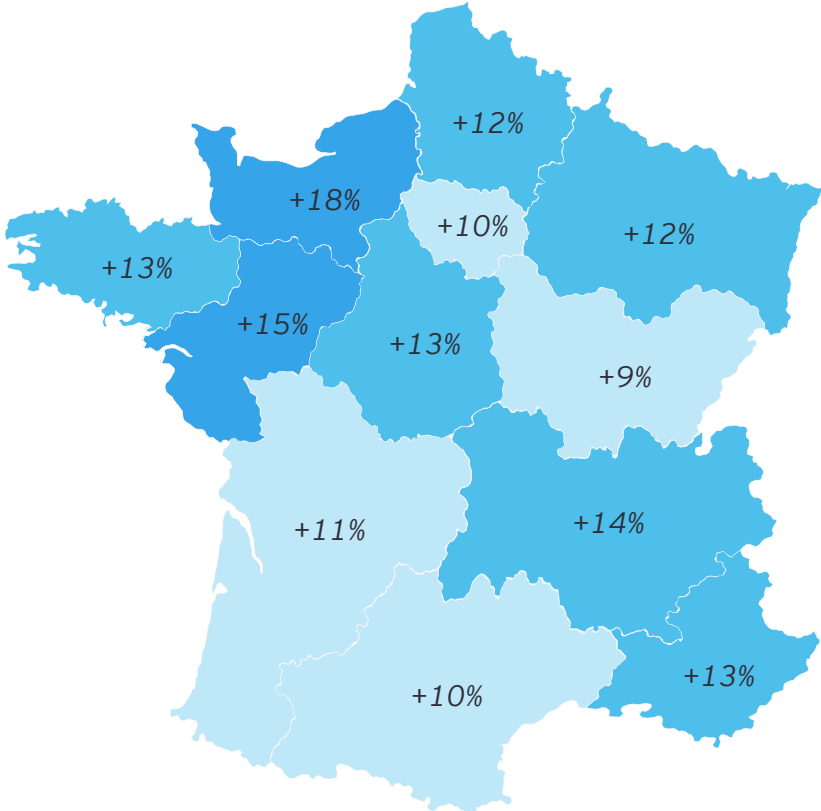
The main consequence of this enthusiasm is that the number of registered members in clubs affiliated with the FFR has increased by +12% in a year

The number of registered members in clubs affiliated with the French Rugby Federation (FFR) increased by 12% in one year. The rugby community attributes this increase to the impact of Rugby World Cup. They also point out that the number of registered members had already been on an upward trend in recent years (an average annual increase of 4% between 2019 and 2023) thanks to the return of members after COVID-19, the good results of the men's and women's French teams, the efforts of governing bodies, and the numerous local outreach activities carried out by clubs.

This "Rugby World Cup 2023 effect" is noticeable across all regional rugby leagues, both in regions that hosted matches, where the growth was 12% between 2023 and 2024 (compared to 4% on average between 2019 and 2023), and in regions that did not host any matches, where the growth was also 12% (compared to 4% previously).

Moreover, as expected, the regional rugby leagues with an already well-established rugby culture (like Nouvelle-Aquitaine and Occitanie) experience a less significant "Rugby World Cup 2023 effect" compared to other regional leagues (particularly Pays de la Loire).

Figure 27: Evolution in the number of registered members in clubs affiliated with the French Rugby Federation (FFR) from February 1, 2023 to February 1, 2024, by regional league



Sources: FFR data, interviews with regional rugby leagues (September - October 2023), EY analysis

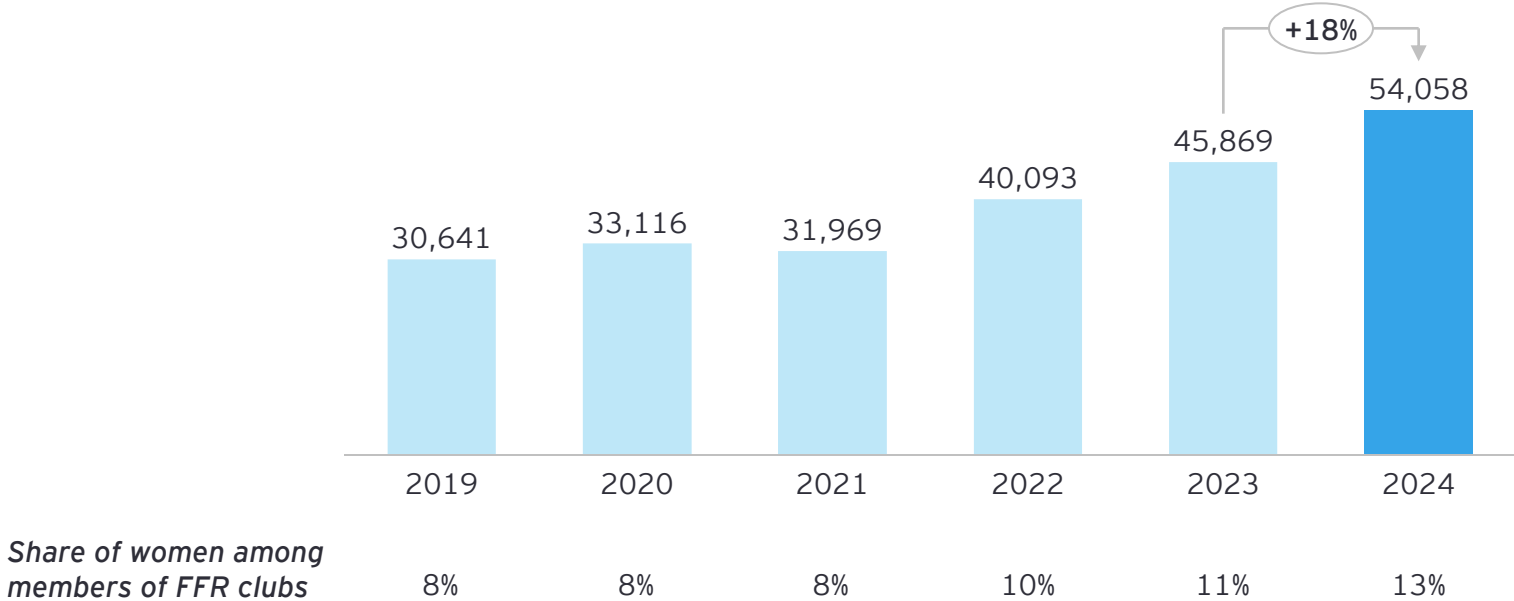
Rugby World Cup 2023 appears to have attracted new audiences to clubs affiliated with French Rugby Federation

Regional rugby leagues report the return of former members to their ranks, with Rugby World Cup 2023 serving as a "catalyst" for re-joining club activities. They also emphasise rugby's appeal to new types of registered players.

The number of girls and women in rugby clubs increased by 18% in one year, reflecting a trend observed in recent years, with an average growth rate of 11% between 2019 and 2023. The interviews suggest that the increase in female members mainly concerns the youngest age categories, where the sport is mixed-gender.

Women were present in the stadiums during Rugby World Cup 2023, representing 25% of the spectators. The survey of ticket holders also reveals that 82% of them felt encouraged in their day-to-day rugby-related activities (such as watching more rugby on TV, on social media, or online).

Figure 28: Evolution in the number of female registered members in clubs affiliated with the French Rugby Federation between 2019 and 2024 (data as of February 1st)



Sources: Interviews with regional rugby leagues (September - October 2023), FFR data, EY analysis



Supporting inclusion and accessibility - Projects implemented by France 2023 (1/2)

Project	Stake	Key actions	Number of beneficiaries
#1 - Social ticketing	<ul style="list-style-type: none"> Make the event accessible to all audiences 	<ul style="list-style-type: none"> Purchase of tickets by the State for the benefit of health facility staff Purchase of tickets by local authorities for the benefit of people in need (unaccompanied minors, young people from the priority neighbourhoods urban policy) 	<ul style="list-style-type: none"> ~51,000 beneficiaries of solidarity tickets
#2 - International wheelchair Rugby Cup	<ul style="list-style-type: none"> Make the event accessible to all audiences 	<ul style="list-style-type: none"> organisation by France 2023 and with the financial support of the State of the International Wheelchair Rugby Cup, in parallel with Rugby World Cup 2023 	<ul style="list-style-type: none"> 144 athletes ~18,000 spectators
#3 - Reception and support for people with disabilities/PRMs	<ul style="list-style-type: none"> Make the event accessible to all audiences 	<ul style="list-style-type: none"> 1% of the ticket office reserved for the public with PWD/PRM free admission for the latter and a ticket upgraded at the lowest rate for their companions Implementation of door-to-door transport devices for people with reduced mobility Provision of audio description services and provision of tablets for the visually impaired 	<ul style="list-style-type: none"> 7,500 people with reduced mobility or disabilities and 6,500 companions
#4 - Rugby is my pride	<ul style="list-style-type: none"> Supporting Inclusion and Promoting Diversity 	<ul style="list-style-type: none"> Highlighting the fight to defend the rights of LGBT+ people in sport through video clips and events 	<ul style="list-style-type: none"> N.A.
#5 - <i>Célébrons nos différences</i> ("Let's celebrate our differences")	<ul style="list-style-type: none"> Supporting inclusion and promoting diversity 	<ul style="list-style-type: none"> Organisation of a photo challenge dedicated to the celebration of all differences in partnership with UNESCO and Canon Exhibition of the winning photos in the host cities and metropolises 	<ul style="list-style-type: none"> 200 participants ~230,000 people attended the exhibitions

Sources: France 2023, Rugby World Cup 2023 review (Ministry of Sports and Olympic Games, Nov. 2023), EY analysis

Supporting inclusion and accessibility - Projects implemented by France 2023 (2/2)

Project	Stake	Key actions	Number of beneficiaries
#6 - Reaching out with isolated seniors	<ul style="list-style-type: none"> Supporting the inclusion of people in need 	<ul style="list-style-type: none"> Fight against the isolation of seniors, by allowing isolated elderly people to attend a Rugby World Cup 2023 match surrounded by volunteers from the Little Brothers of the Poor association and apprentices from Campus 2023 	<ul style="list-style-type: none"> 152 isolated seniors
#7 - National neighbourhood tournament	<ul style="list-style-type: none"> Supporting the inclusion of people in need 	<ul style="list-style-type: none"> Tournament for children aged 8 to 13 from Priority neighbourhoods of the 10 host cities and metropolises of the competition Organisation of citizen workshops and activities to raise children's awareness of aspects of life in society (road safety, environmental preservation, etc.) Opportunity for the most assiduous children to attend a Rugby World Cup 2023 match 	<ul style="list-style-type: none"> 6,000 children participated, 1,320 of whom were brought to a Rugby World Cup match
#8 - Visiting sick children	<ul style="list-style-type: none"> Supporting the inclusion of people in need 	<ul style="list-style-type: none"> Welcoming sick children, accompanied by their families and a volunteer from the Petits Princes association, at a Rugby World Cup 2023 match Distribution of <i>kits</i> (containing <i>goodies</i>, a small rugby ball, and a calendar and a marker) and educational content on rugby in 10 hospitals Visiting sick children in hospitals by international players 	<ul style="list-style-type: none"> 30 sick children attended a Rugby World Cup 2023 match 520 sick children benefiting from kits
#9 - Integration of statutory refugees	<ul style="list-style-type: none"> Supporting the inclusion of people in need 	<ul style="list-style-type: none"> For statutory refugees, organisation of job dating sessions in the host cities and metropolises of Rugby World Cup 2023 	<ul style="list-style-type: none"> 559 participating statutory refugees

Sources: France 2023, Rugby World Cup 2023 review (Ministry of Sports and Olympic Games, Nov. 2023), EY analysis

Committing to Education, Training and Employment - Projects implemented by France 2023

Project	Stake	Key actions	Number of beneficiaries
#10 - Campus 2023	<ul style="list-style-type: none"> Developing training and promoting professional integration 	<ul style="list-style-type: none"> Creation of an apprenticeship training centre (CFA), allowing young women and men to take advantage of the organisation of Rugby World Cup 2023 to train in sports, tourism and security professions 	<ul style="list-style-type: none"> 1,400 apprentices
#11 - <i>Mêlée des Choeurs</i> (Choir scrum)	<ul style="list-style-type: none"> Promoting the educational virtues of sport and rugby 	<ul style="list-style-type: none"> Interpretation of the national team anthems by a children's choir from the schools and high schools of the host academies Training of the children who participated in the singing and consolidation of their knowledge of the countries qualified for Rugby World Cup 2023 	<ul style="list-style-type: none"> 7,000 children supervised by 300 teachers from the French Ministry of Education
#12 - <i>Rugby au Cœur</i> (Rugby at Heart) endowment fund	<ul style="list-style-type: none"> Promoting the educational virtues of sport and rugby 	<ul style="list-style-type: none"> Funding for education, inclusion and equity projects through donations from patrons 	<ul style="list-style-type: none"> ~62,000 people benefiting from projects supported by the <i>Rugby au Cœur</i> endowment fund
#13 - Volunteer Program	<ul style="list-style-type: none"> Developing training and promoting professional integration 	<ul style="list-style-type: none"> Mobilisation of volunteers in all areas of the event, including spectator reception and tournament services, including accreditations, communication and marketing activities, media operations and sports presentations 	<ul style="list-style-type: none"> 4,400 volunteers mobilised by France 2023 for Rugby World Cup 2023

Note: the voluntary program is not part of the France 2023 CSR scheme, but is part of the skills development objective supported by the organising committee.



Methodology

Glossary

Term	Definition
Companions	Person who does not hold tickets but who made the trip to France specifically for the event.
Net Economic Injection	The net economic injection is the total expenditure made in France by international economic actors, from which are deducted leakages (i.e. expenditure by French economic actors abroad).
Accredited population	All accredited persons (Organising Committee, World Rugby, World Rugby guests, media, security, etc.).
'Travel' Program	Nearly 285,000 tickets were sold to travel agencies that organised tours around the matches for their customers. Included in this category are all spectators who have obtained tickets through a travel agency.
Spectators	Rugby World Cup 2023 ticket holders.
Total value added	Total value added includes direct, indirect and induced value added, and corresponds to the contribution to French GDP.
Visitors	Includes spectators, their companions and accredited persons.

The main ingredients of the impact assessment

 **4**
 Nearly 15,000 respondents responded to the survey

 **~60**
 Interviews with organisers, partners and public authorities

~70
 Documents read

Target	Method of administration	Answers (completed)
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Ticket holders	Online	11,121
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Visitors to RWC 2023	On-site	1,537
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Volunteers	Online	1,700
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Shopkeepers	Online	72
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Impact	organisations met	Interviews
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Social	<ul style="list-style-type: none"> • Heads of social programs of France 2023 • Project managers of programs supported by France 2023 • Regional Leagues • Sponsors, etc. 	27
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Environmental	<ul style="list-style-type: none"> • Stadium Managers • France 2023 Teams 	19
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Local	<ul style="list-style-type: none"> • Local authorities and tourism stakeholders in the metropolitan areas of Bordeaux and Nantes 	7
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List of the main external sources mobilised



Note: A glossary of terminologies used in this study is available in the appendices.

This study measures the economic impact derived from international economic actors and the carbon impact of all activities directly related to the event

OBJECTIVES OF THE IMPACT STUDY

WHAT THE IMPACT STUDY IS NOT



Evaluate the direct, indirect and **short-term induced economic impact** of Rugby World Cup 2023 at the national level, incurred by the activities and expenses of international visitors, as well as the expenses of international sources related to the organisation



Assess the environmental impact of Rugby World Cup 2023 caused by the activities of all visitors and personnel involved



Evaluate the specific short-term social impact specific to Rugby World Cup 2023, particularly through a mapping of the initiatives implemented by the Organising Committee



A financial analysis or an audit of the quality of the organising committee's performance






A study on the satisfaction of visitors, partners, sponsors and guests



An assessment of the long-term social impact (on the country's image, legacy, changes for beneficiaries of social impact programs)





Several categories of visitors are distinguished in the study: spectators, accredited population and occasional visitors

Breakdown of the number of visitors by category, nationality and reason for stay

		Reason for stay			TOTAL by nationality	TOTAL by category	TOTAL
	Nationality	Sport fans Came specifically for Rugby World Cup 2023	Occasional Came for other reasons and attended a game				
	Spectators (with scanned tickets)	French	488,000	26,000	514,000	901,000	1,055,000
		Internationals	378,000	9,000	387,000		
	Companions	French	17,000	0	17,000	38,000	
		Internationals	21,000	0	21,000		
	Accredited	French	99,000	0	99,000	116,000	
		Internationals	17,000	0	17,000		
TOTAL - Visitors	French	604,000	26,000	630,000			
	Internationals	416,000	9,000	425,000			
	All nationalities	1,020,000	35,000				

Occasional spectators are excluded from the calculation of the economic impact and carbon impact.

The scope of calculation of the economic impact and the environmental impact differ, as these two approaches meet different objectives

OBJECTIVE		ECONOMIC NET IMPACT		ENVIRONMENTAL IMPACT		
		Measuring the net impact of international actors on French territory		Measuring all GHG emissions related to the event		
		 France	 International	 France	 International	
SCOPE	Visitors*	Spectators and companions	✗	✓	✓	✓
		Accredited	✗	✓	✓	✓
	Visitor Activities*	Accommodation and catering	✗	✓	✓	✓
		Tourist activities	✗	✓	✓	✓
		Other purchases (merchandising)	✗	✓	✓	✓
		Travel to France	✗	~ **	✓	✓
		Travel in France	✗	✓	✓	✓
	Other	Infrastructures	✗	N.A.	✓	N.A.
SYNTHESIS		Only flows from abroad to French stakeholders are included.		All sources of emissions directly related to the event are included.		

*"Occasionals", i.e. spectators who travelled for reasons other than RWC 2023 but who took advantage of their presence to go there, are not taken into account in the calculation of the economic or environmental impact.

**For travel to France, only expenses made with French companies are included.

Sources: Measuring the impact of a tourism event (DGE), EY analysis



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