

Rugby World Cup 2019™

Review of outcomes

EY

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**RUGBY
WORLD CUP™**
JAPAN 日本 2019

PROFESSIONAL SERVICES SUPPLIER

Scope and purposes of this report

Rugby World Cup 2019 (RWC 2019) opened on 20 September 2019 as the first Rugby World Cup to be held in Japan, or indeed, anywhere in Asia. After 44 days of excitement, it closed on 2 November with South Africa crowned world champions.

During the tournament, a major typhoon struck Japan, resulting in the cancellation of three matches. Meanwhile, Japan team beat several contenders to place for the quarter-finals for the first time. Its performance helped to increase excitement about the tournament. Chairman Sir Bill Beaumont summarized the event by saying, "Rugby World Cup 2019 in Japan will be remembered as one of the great, if not the greatest of all Rugby World Cups." From the perspective of economic impact, RWC 2019 brought 242,000 inbound spectators to Japan from other countries, generating total impact of ¥646.4 billion (£4,309 million). This is discussed in more detail in the separately published Economic Impact Analysis Report of RWC 2019.

The results of RWC 2019 extend far beyond the economic realm. Sold-out stadiums communicated the appeal of rugby, 'niwaka fans (newcomers)' emerged as the drivers of RWC 2019 boom and tournament operations successfully withstood a major typhoon. This report reviews RWC 2019's achievements and outcomes, using surveys and analyses to identify the reasons them. The objective of this report is to serve as reference when planning for future major international sporting events in Japan.

This report uses RWC 2019 data and findings from surveys to describe:

1. RWC 2019's results
2. Reasons behind RWC 2019 results
3. Insights that can be used when organizing similar tournaments in the future

Please refer to the Economic Impact Analysis Report of RWC 2019 for the methods used to measure economic impact and the rationale behind calculations.



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Survey and analysis approach of this report

This report was created on the basis of findings from two surveys conducted together with data in the possession of RWC 2019 Organizing Committee, purchaser database, and media/SNS etc. viewing data. In Chapter 5, "How was the decision made to cancel matches during the typhoon?," documents related to event administration and interviews with members of the Organizing Committee were also used to summarize, analyze and develop observations regarding the events.

| Name | (1) Ticket purchaser survey | (2) Japan resident survey | | | | | | | | | | | | | | | |
|----------------------|--|--|----------------|--------------------|-----------------|---|--|-----------|--|----------------------------------|--|--|----------------|----------------|--|------------------|--|
| Outline | <ul style="list-style-type: none"> ▶ Survey of ticket purchasers for the purpose of calculating the economic impact of Rugby World Cup ▶ The ticket purchaser database was used to send surveys to ticket purchasers immediately after the end of the tournament ▶ There were two types of survey conducted, one for Japan residents (consumption behavior associated with rugby attendance), and one for non-Japan residents (general consumption behavior while in Japan) | <ul style="list-style-type: none"> ▶ Survey performed of domestic consumer residing in Japan* for the purpose of understanding Rugby World Cup attendance and viewing ▶ The survey was transmitted after the tournament to a randomly selected sample using a respondent panel from an internet survey company ▶ The survey was conducted in two stages, primary survey (overview survey of whether the tournament had been viewed etc.) and secondary survey (survey of tournament attendance and viewing) | | | | | | | | | | | | | | | |
| Number of questions | <ul style="list-style-type: none"> ▶ For Japan residents: 16 ▶ For non-Japan residents: 44 | <ul style="list-style-type: none"> ▶ Primary survey: 11 ▶ Secondary survey: 23 | | | | | | | | | | | | | | | |
| Sample and responses | <table border="0"> <thead> <tr> <th></th> <th>Japan resident</th> <th>Non-Japan resident</th> </tr> </thead> <tbody> <tr> <td>Scope of survey</td> <td>Ticket purchasers on RWC 2019 official site 267,000</td> <td>Ticket purchasers on RWC 2019 official site 50,000</td> </tr> <tr> <td>Responses</td> <td>Return rate: 35% 95,081 (maximum n for ticket purchaser survey)</td> <td>Return rate: 11% 5,391</td> </tr> </tbody> </table> | | Japan resident | Non-Japan resident | Scope of survey | Ticket purchasers on RWC 2019 official site 267,000 | Ticket purchasers on RWC 2019 official site 50,000 | Responses | Return rate: 35% 95,081 (maximum n for ticket purchaser survey) | Return rate: 11% 5,391 | <table border="0"> <thead> <tr> <th></th> <th>Japan resident</th> </tr> </thead> <tbody> <tr> <td>Primary survey</td> <td>80,000 (n for survey of tournament attended/viewed or not)</td> </tr> <tr> <td>Secondary survey</td> <td> <ul style="list-style-type: none"> ▶ Did not watch RWC 2019 ⇒ End of survey ▶ Watched RWC 2019 ⇒ To secondary survey (however, due to the large number of TV spectators at home etc., this group was limited to 1/10 of the sample) 5,688 (n for survey of attendance/viewing) </td> </tr> </tbody> </table> | | Japan resident | Primary survey | 80,000 (n for survey of tournament attended/viewed or not) | Secondary survey | <ul style="list-style-type: none"> ▶ Did not watch RWC 2019 ⇒ End of survey ▶ Watched RWC 2019 ⇒ To secondary survey (however, due to the large number of TV spectators at home etc., this group was limited to 1/10 of the sample) 5,688 (n for survey of attendance/viewing) |
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| Language | Japanese, English | Japanese | | | | | | | | | | | | | | | |

* The Japan resident survey covered people between 15 and 79 years of age

01

RWC 2019 by the numbers Outcome review: Facts and data

1. Size and nature of event
2. Sold-out stadiums
3. RWC 2019 as a social phenomenon
4. Foreign spectators visiting Japan and international exchange
5. Event administration and volunteers



01 RWC 2019 by the numbers

1. Size and nature of event

Tournament period

44 days

Rugby World Cup is a long event, requiring 44 days in spite of being only a single sport. This 44-day period is much greater than the 17 days of the Summer Olympics and the 32 days of the FIFA World Cup.

Event period



Host cities

12

Tournament volunteers
13,000

Participating teams
20

Match venues

12

Match played

45

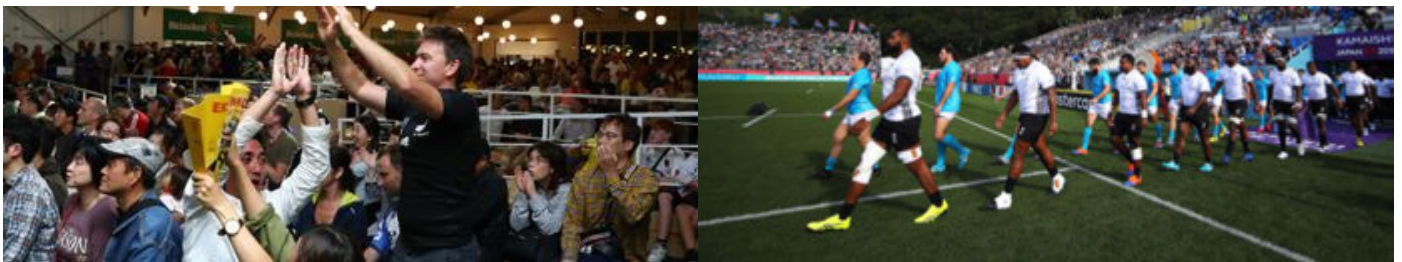
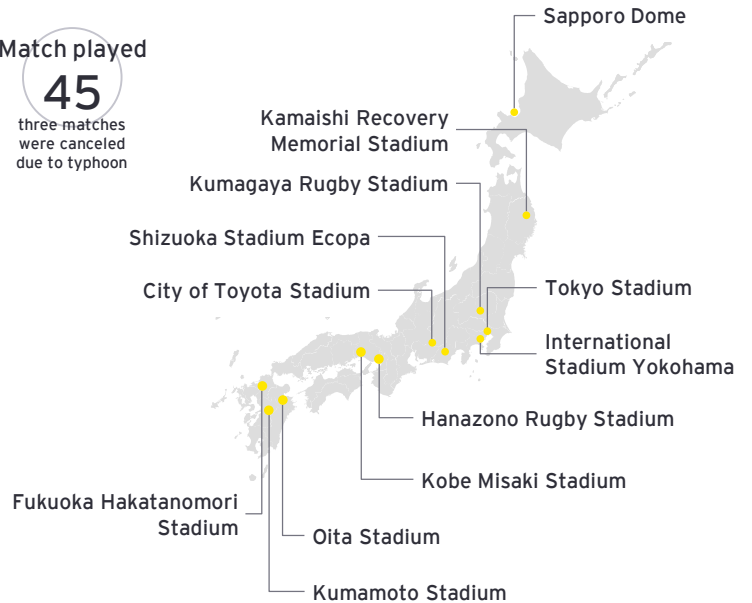
three matches were canceled due to typhoon

Fanzones

16

Official team camps

55



Host cities

12 cities around Japan

Compared to the Olympics, which are usually held in a single city, Rugby World Cup is distinguished by matches in a large number of locales. This event visited 12 distinctive cities, from Sapporo in the north to Kumamoto in the south, each of which tied connected the matches to their unique local histories, cultures, traditions, arts and other tourism resources as they welcomed their guests. At the Kamaishi Recovery Memorial Stadium in Iwate, the organizers highlighted the architectural design of the venue which also includes a number of disaster-preparedness facilities like heliports and earthquake-proof water storage tanks.

Fanzones

16 venues around Japan

RWC 2019 contributed significantly to the spread of fanzones, a new form of spectator culture. 16 fanzones were set up in the 12 host cities, attracting a total of 1,137,288 spectators and outdoing the previous England 2015 (1,055,000) to set a new Rugby World Cup record despite adverse weather leading to three fewer matches and closed fanzones. Chapter 3 contains a detailed analysis of fanzone spectator profiles and motivations.

01 RWC 2019 by the numbers

2. Sold-out stadiums



Total number of stadium spectators

1.704 million
(Excluding 3 canceled matches)

Highest number of stadium spectators

70,103

Number of tickets sold

1.837 million
(Including 3 canceled matches)

Ticket sales rate

99%

Ticket revenue

¥ **38.9** bn
(£259 m)

Hospitality package sales

¥ **10** bn
(£67 m)

RWC 2019 recorded total number of 1,704,443 stadium spectators, surpassing the 1.47 million of New Zealand 2011 in spite of the fact that it was being held for the first time ever in a country without a strong rugby tradition. The highest number of stadium spectators, 70,103, was recorded by the final match in which South Africa was victorious over England. International Stadium Yokohama, which hosted the final, is a major stadium with one of the largest capacities in Japan, and this match set a new attendance record for it.

RWC 2019 set a high goal for ticket sales of "stadiums sold out for all matches." Thanks to sales efforts by the local governments in the host cities and strong performance of the Japan team, the event sold a total of 1.718 million tickets, excluding the three matches that were canceled. If the canceled matches are included, a total of 1,837,000 tickets were sold, for a sales rate of 99%, almost completely meeting the target. Chapter 2 contains an examination and observation to identify the backgrounds and factors that produced these sold-out-stadiums.

RWC 2019 generated a total of ¥38.9 billion (£259 million) in ticket revenues, making a significant contribution to the overall profitability of the event. RWC 2019 also sold a large number of hospitality packages that added food, expert explanations, lounge access and other services to the admission ticket.* According to STH Japan, the official hospitality provider for the event, packages were purchased by a total of 63,000 guests from Japan and other countries, generating sales in excess of ¥10 billion (£67 million).

*Hospitality programs provided by sponsor companies for their own guests are excluded.

01 RWC 2019 by the numbers

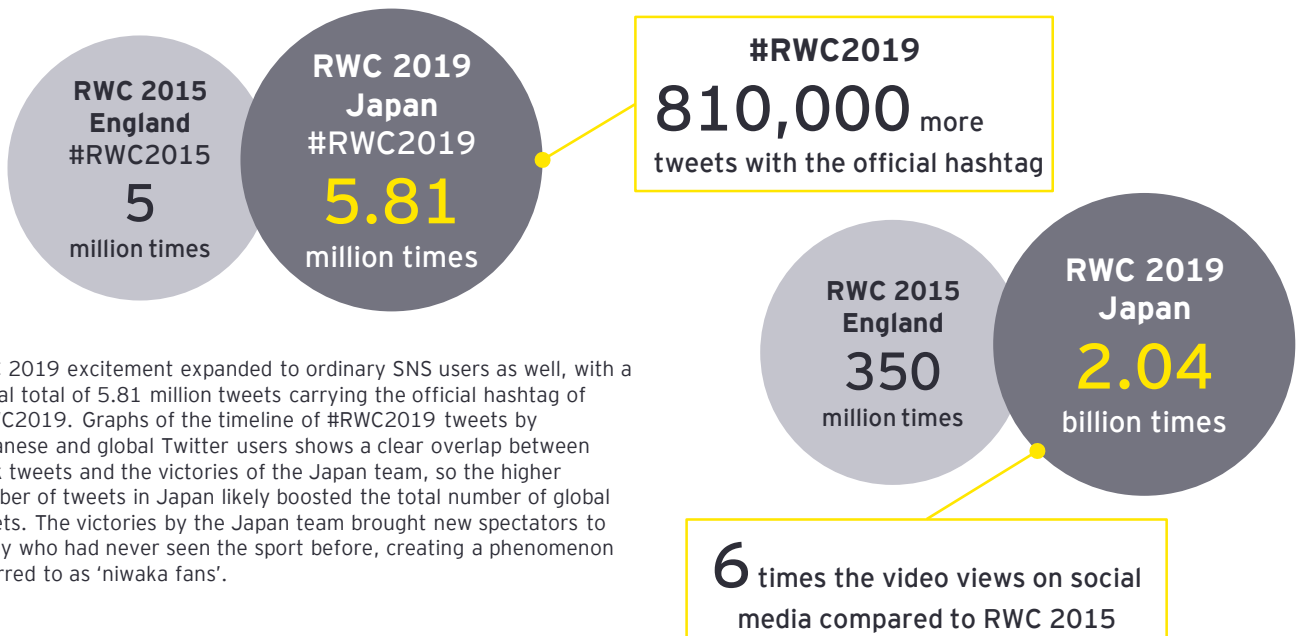
3. RWC 2019 as a social phenomenon

Cumulative Audience on TV
857.28 million viewers

The excitement brought by RWC 2019 did more than fill stadiums with fans. Globally, RWC 2019-related TV broadcasts attracted a total of 857.28 million viewers, which is 26% increase from RWC 2015. For domestic television broadcasting, the match in which Japan defeated the powerful Scotland to go on to its first quarter-final recorded a peak viewing rate of 53.7% in the Kanto region*.

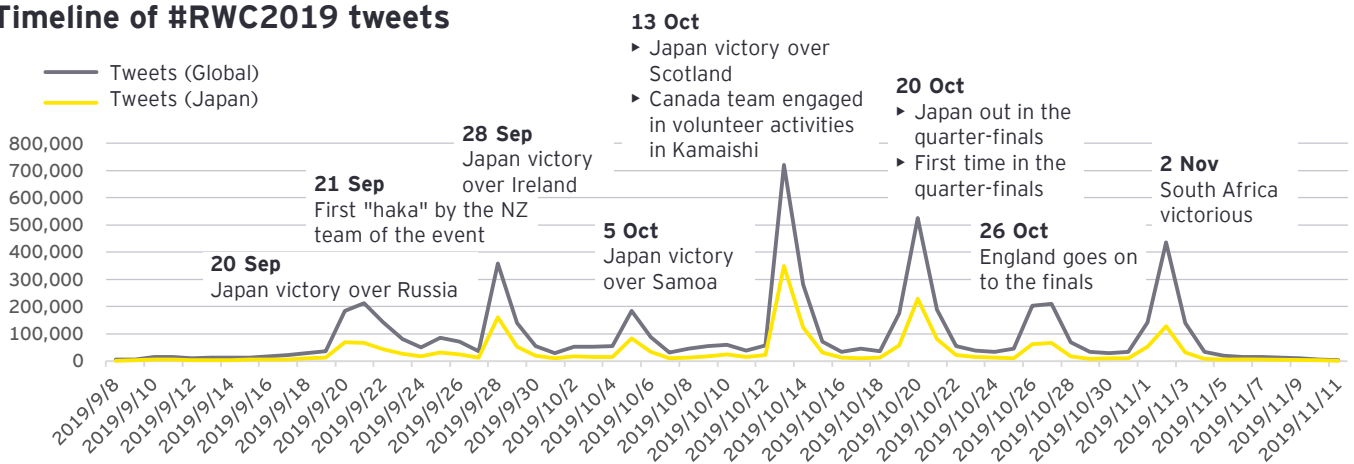
Video views on social media
2.04 bn views

RWC 2019 official site also produced extraordinarily strong results for digital viewing, including video content and streaming. Videos published on social media during the period were played 2.04 billion times, roughly six-fold the numbers of the previous RWC in 2015.



RWC 2019 excitement expanded to ordinary SNS users as well, with a global total of 5.81 million tweets carrying the official hashtag of #RWC2019. Graphs of the timeline of #RWC2019 tweets by Japanese and global Twitter users shows a clear overlap between peak tweets and the victories of the Japan team, so the higher number of tweets in Japan likely boosted the total number of global tweets. The victories by the Japan team brought new spectators to rugby who had never seen the sport before, creating a phenomenon referred to as 'niwaka fans'.

Timeline of #RWC2019 tweets



* Kanto region is an area which comprises Tokyo and the six surrounding prefectures.

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01 RWC 2019 by the numbers

4. Foreign spectators visiting Japan and international exchange

Spectators visiting Japan

242,000^{*1}

An estimated 242,000 people visited Japan from other countries specifically to watch RWC 2019, many traveling great distances from Europe and elsewhere that are home to the strongest rugby teams. Calculating from the location information provided by ticket purchasers, 28.2% of purchases were from overseas, a total of 518,000 tickets. Most of the visitors enjoyed tourism, meals and other excursions together with the matches, giving them an opportunity to become more familiar with Japanese culture. Chapter 4 contains a detailed analysis of their behavior.



RWC 2019 was the first Rugby World Cup in history to be held in Asia. World Rugby believed that RWC 2019 had the potential to be a powerful game-changer for rugby in Asia. The World Rugby program "Impact Beyond 2019", run in partnership with the Japan Rugby Football Union (JRFU), Asia Rugby and 22 unions, achieved an incredible 2.25 million new rugby participants across Asia, including more than 1.18 million in Japan. "Impact Beyond 2019" consists of several programs, such as education programs in which students and children from Asia were invited to Japan to experience rugby.

Impact Beyond 2019
participants from around
Asia

2.25 million^{*2}

Japanese elementary
schools adopting
tag rugby

6,616^{*2}

As part of the Impact Beyond program, approximately 769,000 children from 6,616 elementary schools in Japan played Tag Rugby, a sport that is safe and enjoyable without physical contact. Rugby workshops were also held at rugby schools around Japan, mainly in the cities hosting RWC2019, and through them 29,000 children (in junior high school or younger) experienced rugby for the first time.

*1 Approach to calculating RWC 2019 inbound visitor numbers. - Calculated using the "number of ticket purchasers residing in other countries" on the JR2019 official ticketing website and the "average number of accompanying people visiting Japan with ticket purchasers residing in other countries" from an e-mail survey. For people purchasing tickets by other methods, calculations used the same average number of accompanying people.

*2 Numbers from "Impact Beyond 2019" (World Rugby).

01 RWC 2019 by the numbers

5. Event administration and volunteers

Matches played

45

3 matches canceled due to typhoon

Security incidents

0

Registered volunteers

Approx. **13,000**

After the opening on 20 September 2019, a total of 45 thrilling, exciting matches were played in RWC 2019 before the tournament ended on 2 November. RWC 2019 Organizing Committee, which was responsible for event administration, worked in close coordination with World Rugby and Rugby World Cup Limited, local governments in host cities, relevant ministries and agencies, and other organizations to produce a safe and secure event. During RWC period, Japan was struck by a major typhoon that forced the cancellation of three matches, but process of crisis response enabled the event administration to keep the athletes, spectators and all of the staff safe. Chapter 5 of this report contains analysis and observations of the timeline leading up to the decision to cancel matches during the typhoon based on interviews with RWC 2019 Organizing Committee members and others.

More than 1.7 million fans from around the world visited stadiums during the event, but there were zero incidents of security such as terrorism or crowding leading to crushing. Cyber-security has also become a greater risk in recent years, and during RWC 2019, 12 distributed denial-of-service attacks, which are potentially harmful to servers and network equipment, were detected, but they were locked out of the network to prevent damage, resulting in a safe and secure tournament both in the stadiums and in cyberspace.

The initial plan was to recruit 10,000 official volunteers for RWC 2019, but applications were received from 38,000, a new record for a Rugby World Cup. After lotteries and documentary reviews, approx. 13,000 registered as volunteer staff, working to support stadium operations and guide spectators from nearby train stations and airports. The staff cheerfully greeted guests as they entered venues and smiled widely for commemorative photographs on visitors' smartphones, a strong demonstration of Japanese-style hospitality for both domestic and international spectators. There were numerous posts on social media on the volunteer staff during the event, many expressing how attractive they found Japan to be and how warm and friendly its people are.



02

Why stadiums sold out Survey analysis of RWC 2019 ticket purchasers

1. Sold-out stadiums
2. Breakdown of RWC 2019 ticket purchasers
3. RWC 2019 ticket purchasing motivations
4. Timeline of ticket purchasing
5. Summary: Why stadiums sold out



02

Why stadiums sold out

1. Sold-out stadiums

According to the Rugby World Cup 2019 Organizing Committee, a total of 1.704 million people attended RWC 2019 (based on venue admissions), with a total of 1.837 million ticket purchasers (1.718 million excluding matches canceled because of typhoon). The tournament had a ticket sell-out rate in excess of 99%. These numbers are lower than the previous England 2015, but the sell-out rate was the higher than any previous tournament so far. Stadiums were sold out for virtually all matches, and the enthusiasm and excitement were broadly communicated throughout the tournament period, including stadiums with maximum capacity of roughly 70,000, bringing significant public attention to RWC 2019.

From the very beginning, RWC 2019 set a goal of "sold-out stadiums for all matches". This was an obvious goal for the Japan tournament because Rugby World Cup is one of the most famous global sports events and attracts large numbers of spectators. Nonetheless, Japan is not one of the world's leading countries when it comes to rugby, and prior to RWC 2019, the number of rugby spectators was by no

means large. According to the Japan Rugby Football Union, Japan Rugby Top League ("Top League" below) were around 450,000-500,000 per year from spectator (total attendance),^{*1} and selling out RWC 2019 would require four times more spectators than the Top League was bringing in in a year. When the FIFA World Cup was held in Japan in 2002, 1.44 million spectators were attracted,^{*2} but at the time, the domestic soccer league brought in 5.73 million spectators (total attendance) per year.^{*3} FIFA World Cup 2002 and RWC 2019 were held in vastly different times and environments, so simple comparisons would not be appropriate; suffice it to say that "selling out stadiums" was not an easy task for RWC 2019.

The question in this chapter is why stadiums were sold out in spite of all the challenges. To answer this, we examine ticket purchasing data for the tournament and the results from a ticket purchaser survey and Japan resident survey to identify the background and factors at work among spectators that led to "sold-out stadiums".^{*4}

Number of RWC 2019 spectators: Comparison against FIFA World Cup 2002

| | RWC 2019 Japan | FIFA World Cup 2002 Japan/Korea |
|----------------------------|--|---|
| Tournament spectators | 1.837m (Number of tickets purchased, including tickets for matches canceled because of typhoon) | 1.44m^{*2} (Attendance at venues in Japan) |
| Domestic league spectators | Annual Top League spectators 0.45m - 0.5m^{*1} (2015-2018 actuals) Number of matches 122-123 | Annual J League spectators 5.73m^{*3} Number of matches 504 (2002, Actuals) |

RWC 2019 ticket prices: Comparison against other rugby tournaments and matches

| RWC 2019 Average ticket unit price | Test Match 2018 Japan-New Zealand average ticket unit price ^{*1} | Top League 2018 Average ticket unit price ^{*1} |
|---------------------------------------|---|--|
| ¥21,175 (£141) | ¥11,515 (£77) | ¥1,404 (£9.4) |

The high prices for RWC 2019 tickets were viewed as a hurdle to selling out stadiums. Average ticket prices for the tournament were over ¥20,000 (£133, actuals) compared to an average ¥1,404 (£9.4) for Top League (2018 actuals) and an average ¥11,515 (£77) for the Japan-New Zealand test match (2018 actuals).^{*1}

*1 From Japan Rugby Football Union data.

*2 FIFA.com, Fact Sheet (https://www.jtb.or.jp/wp-content/uploads/2014/12/report2004_4-2.pdf).

*3 J.LEAGUE Data Site, J League annual attendance figures (<https://data.j-league.or.jp/SFTD12/>).

*4 The "ticket purchasing data" used in this report consists of purchaser information and purchase history data for tickets sold on the official site. Approximately 25% of all tickets were not sold on the official site (instead sold through agencies, related parties, same-day on-site sales etc.), but for the purposes of this report, it is assumed that tickets sold through other channels exhibit the same trends as those sold on the official site, and estimates are therefore calculated based on the ratios for official site sales.

02

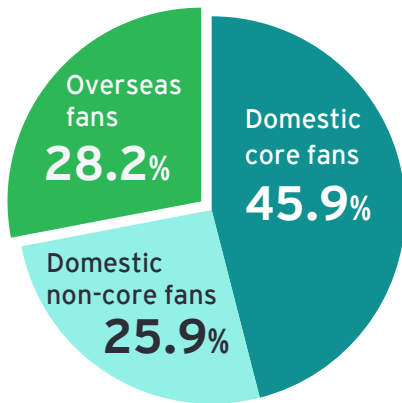
Why stadiums sold out

2. Breakdown of RWC 2019 ticket purchasers

What kinds of people filled the stadiums? We analyze ticket purchasing data and the results of a survey of ticket purchasers to get a glimpse into who the spectators were. In this context, "ticket purchasing data" refers to purchaser information and purchasing history data for tickets sold on RWC 2019 official site (75% of all tickets sold [1.383 million]). Ticket purchasers were requested to complete the survey, and responses were received from a total of 99,000 domestic and international ticket purchasers, representing 31% of the 317,000 ticket purchasers on the official site.

3 types of spectators purchased RWC 2019 tickets

Breakdown by tickets purchased

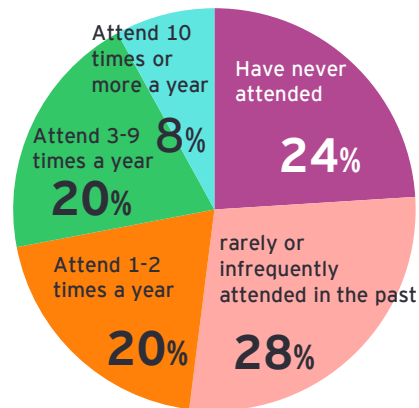


Overseas fans

Ticket purchasing data indicates that overseas fans accounted for 28.2% of total tickets purchased (518,000).

See Chapter 4 of this report for an analysis of the profiles and behavior of international spectators coming to Japan to attend RWC 2019.

Ticket purchasers categorized by previous rugby experience (Japan spectators)



Japan spectators: 'Core fans' who regularly attend rugby

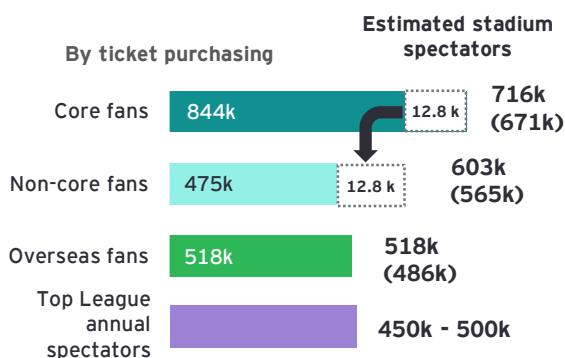
For this report, we consider people who responded that they "attend at least 1 rugby match a year" on the purchaser survey to be regular rugby watchers prior to RWC 2019 and refer to them as core fans. The purchaser survey indicates that 48% of ticket purchasers in Japan were core fans and they purchased 45.9% of all tickets (estimated 844,000).

Japan spectators: 'Non-core fans' with little experience attending rugby matches

People who responded that they "have never attended" or "rarely or infrequently attended in a past" on the purchaser survey were considered to be non-core fans, and this report examines their profiles and trends, comparing and contrasting them with core fans. The purchaser survey indicates that 52% of Japan ticket purchasers were non-core fans, accounting for 25.9% of the total tickets purchased (estimated 475,000).

Breakdown of stadium spectators by category

Total number of spectators, based on ticket purchasing volume



It should be noted that ticket purchasers were not necessarily the people who actually went to the stadiums. Core fans purchased on average 5.3 tickets each, and survey data indicates that 2.2 of those tickets were used by family members, friends and others accompanying the purchaser to the match. Estimates based on ticket purchasing data and survey data indicate that non-core fans accounted for an average of 15% of the people accompanying core fans to the stadiums. In other words, 128,000 tickets were for non-core fans.

Incorporating this correction, 3 types of spectators, Japan core fans, Japan non-core fans and overseas fans each accounted for around one third of the spectators in RWC 2019 stadiums. We estimate that total core fans were 716,000 (671,000 if matches canceled due to typhoon are excluded), with 603,000 non-core fans (565,000 if canceled matches are excluded) and 518,000 overseas fans (486,000 if canceled matches are excluded). The Top League attracts 450,000-500,000 spectators per year, so each of RWC 2019 categories on its own was greater than or equal to annual Top League spectators.

*Brackets indicate totals accounting for matches canceled due to typhoon. Top League annual spectator numbers come from 2015-2018 actuals.

02

Why stadiums sold out

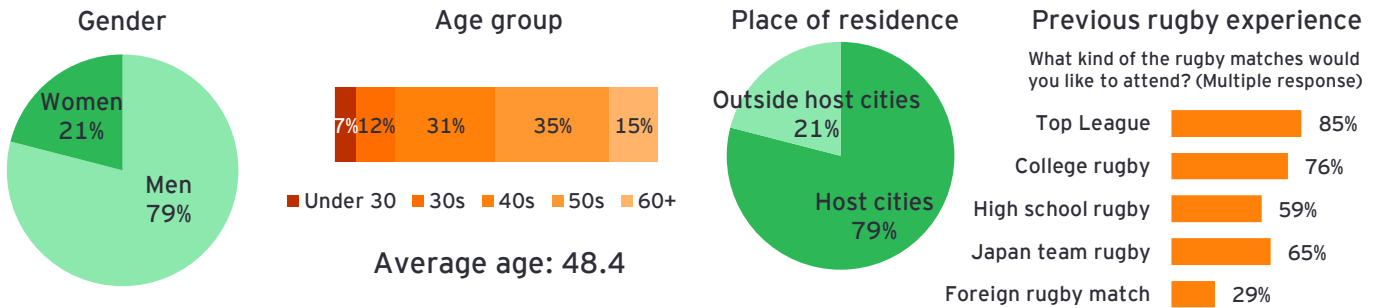
2. Breakdown of RWC 2019 ticket purchasers

Ticket purchaser profile

What kinds of people purchased tickets? A total of 1.9 million people registered user IDs with RWC 2019 official site, of which, 317,000 purchased at least one ticket. Categorizing ticket purchasers by place of residence, 267,000 were Japan residents and 50,000 were non-Japan residents. Their ticket purchasing history and survey responses (Japan response rate 35%, non-Japan response rate 11%) help us to further round out the profiles.

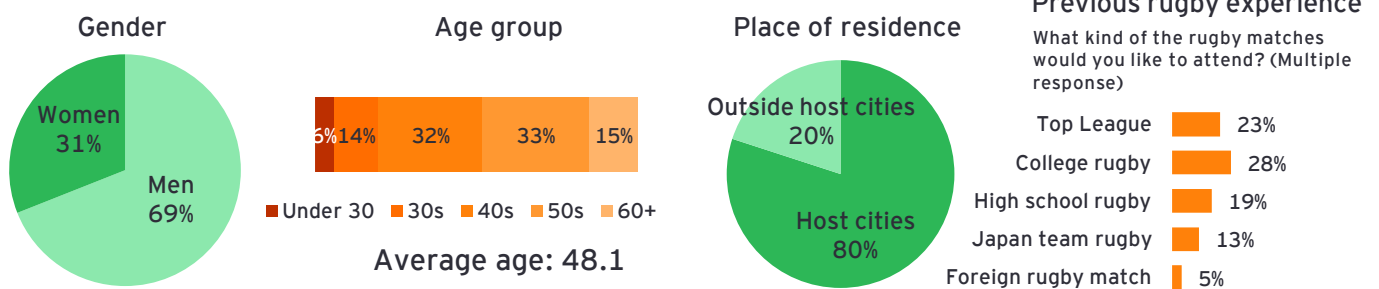
Basic information on core fans

This report defines core fans as ticket purchasers residing in Japan who attend 1 time and more a year (48% of ticket purchasers residing in Japan). By gender, roughly 80% were men; the age group was primarily 40s and 50s, and 80% were residents of the host city. The most common previous rugby experience was the Top League at 85%, followed by college rugby at 76%.



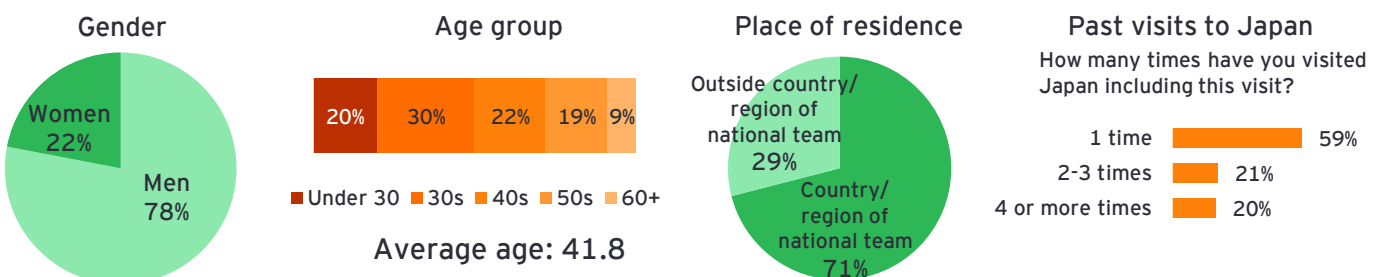
Basic information on non-core fans

This report defined non-core fans as the other 52% of ticket purchasers residing in Japan. Ages and places of residence were virtually the same as core fans, but by gender, women accounted for 31%, notably higher than for core fans. Their most common previous rugby experience was college rugby at 28%.



Basic information on overseas fans

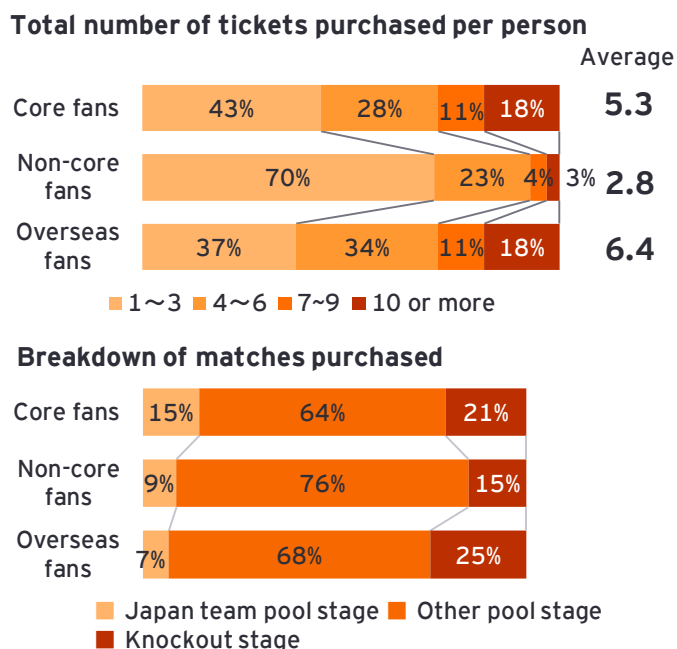
There were 50,000 ticket purchasers living in other countries. The gender breakdown was virtually equivalent to Japan core fans at 78% men, and by age, 30s and younger accounted for 50%. Some 29% of this group were residents countries and regions from which teams were not participating in RWC 2019, and for around 60%, it was their first visit to Japan.



Breakdown of average number of tickets purchased and matches purchased

Ticket purchasing history data was used to identify the number of tickets purchased per person and the breakdown of matches purchased (pool stage of Japan team, pool stage of other teams, finals tournament) for each group (core fans, non-core fans and overseas fans).

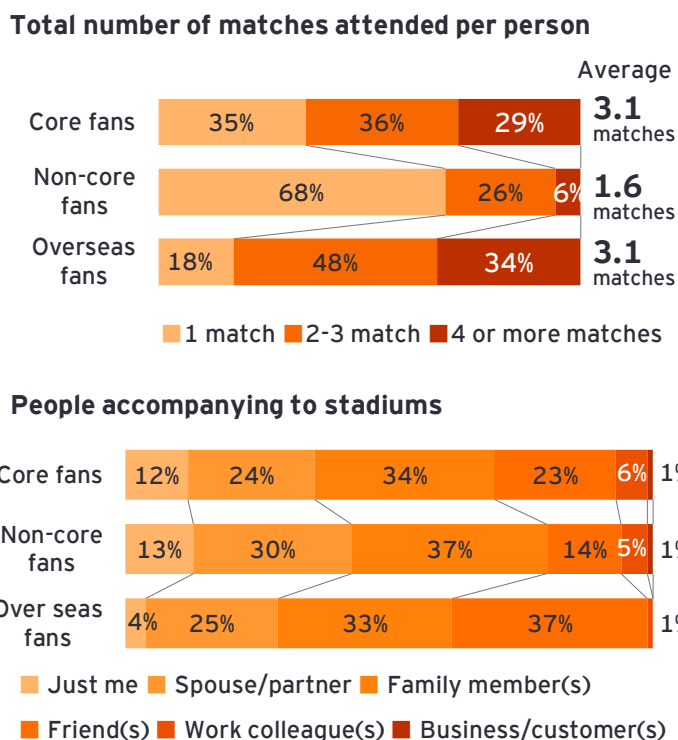
- ▶ Core fans purchased an average of 5.3 tickets each, significantly more than non-core fans. The percentage of Japan team matches purchased was also higher than for other spectator groups.
- ▶ Non-core fans purchased an average of 2.8 tickets each. Their tickets had higher percentages than other spectator groups of pool stage matches in which the Japan team was not playing.
- ▶ Overseas fans purchased an average of 6.4 tickets each, the highest of all the spectator groups. Their tickets had a higher percentage of knockout matches than other spectator groups.



Total number of matches attended, accompanying persons

These figures illustrate number of matches attended per person and the people accompanying purchasers to matches broken down by core fans, non-core fans and overseas fans. They are based on the ticket purchaser survey.

- ▶ Core fans attended an average of 3.1 matches at stadiums, more than non-core fans. Roughly 90% of core fans were accompanied by family members and friends when attending stadium matches, while 10% attended by themselves.
- ▶ Non-core fans attended an average of 1.6 matches at stadiums. Like core fans, roughly 90% of non-core fans were accompanied to stadium matches by family members and friends. Numbers also indicate that 10% of non-core fans, who had never watched much rugby before, went to stadiums by themselves, which is an indication of the amount of attention received by RWC 2019.
- ▶ Overseas fans attended an average of 3.1 matches at stadiums, on par with core fans. Some 96% of overseas fans were accompanied by others when attending matches at stadiums, which indicates that most purchased tickets and stayed in Japan for a long period of time together with family members and friends to attend multiple matches.



Data source supplement

Aggregated values based on ticket data*

▶ Gender ▶ Age group ▶ Place of residence ▶ Average number of tickets purchased per person ▶ Breakdown of matches purchased

*Survey data used for core fan/non-core fan categorization

Survey data

▶ Rugby experience ▶ Previous visits to Japan ▶ Total number of matches attended per person ▶ People accompanying to stadiums

02

Why stadiums sold out

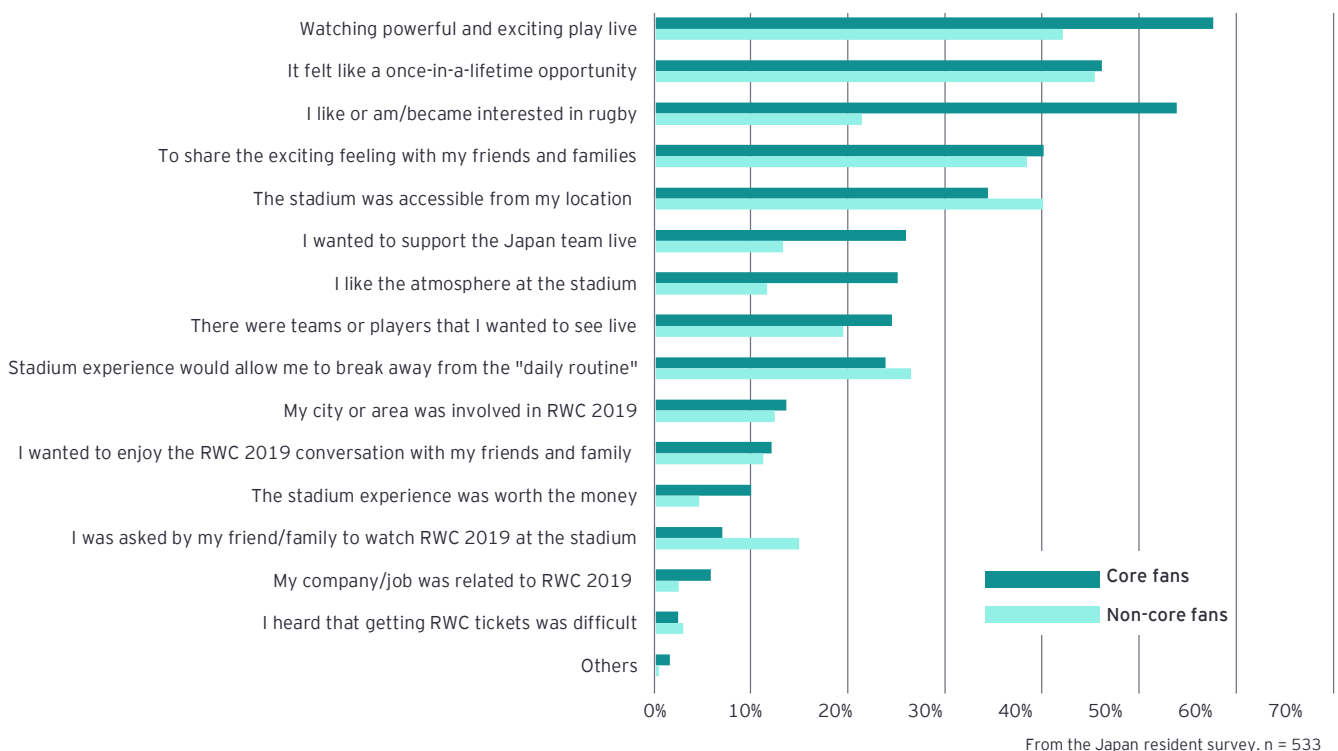
3. RWC 2019 ticket purchasing motivations

Spectators filled stadiums to capacity during the tournament. What motivated them to purchase tickets? A survey of Japan residents conducted after the tournament (Japan resident survey) explored the ticket purchasing motivations of core fans and non-core fans.

Ticket purchasing motivations

Survey question: Select up to 5 important reasons why you purchased tickets.

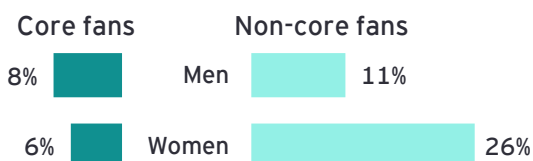
<Respondents> People who answered that they bought a ticket for RWC 2019



For core fans, the top motivation to purchase tickets was "watching powerful and exciting play live", followed by "I like or am/became interested in rugby". In short, they purchased tickets to be able to experience firsthand the thrills of rugby.

For non-core fans, the top motivation to purchase tickets was "it felt like a once-in-a-lifetime opportunity". This was a special event, the first time Rugby World Cup had been held in Japan or anywhere else in Asia, and that had a large impact on people who had never really watched much rugby before. Compared to core fans, there were also high numbers of people responding "the stadium was accessible from my location" and "I was asked by my friend/family to watch RWC 2019 at the stadium". With matches in 12 cities round Japan, the tournament was easily accessible, which combined with the excitement of and invitations from other people to give non-core fans more motivation to purchase tickets.

Percentage responding "I was asked by my friend /family to watch RWC 2019 at the stadium"



Breaking down core fan and non-core fan motivations by gender, more non-core fan women than men responded "I was asked by my friend /family to watch RWC 2019 at the stadium". The 'niwaka fan phenomenon' was one of the more talked-about topics for the tournament, and many of the people referred to as 'niwaka fans' probably purchased tickets because they were influenced by the people around them.

02

Why stadiums sold out

4. Timeline of ticket purchasing

There were 1.837 million tickets to RWC 2019, and despite the size of that number, they were almost completely sold out. When were these tickets sold? What was the trigger event? How was it done? Tickets to the tournament went on sale in January 2018 and were released in a series of stages, including both lottery and first-come first-served sales. This section summarizes the timings at which Japan resident core fans and non-core fans purchased tickets during each stage.

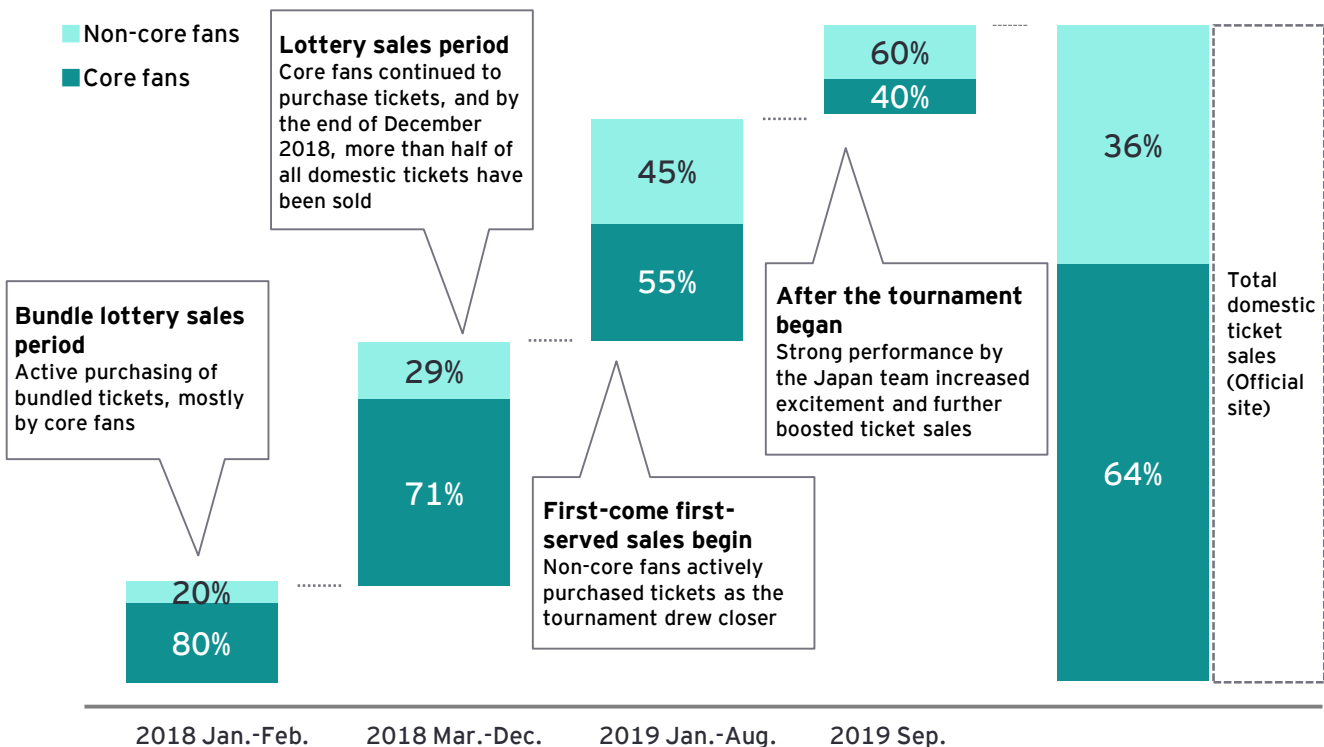
2018, Jan. - Dec.: Core fans purchase bundled tickets

Applications for ticket purchase began being accepted in January 2018, and at this time there were lotteries for team packages that allowed attendance at all pool stage matches of a favorite team, and stadium packages that allowed attendance at all pool stage matches in specific venues. These bundles were popular with core fans who already understood the excitement of rugby and provided the initial momentum for ticket sales. They accounted for roughly half of all ticket purchases by Japan residents during 2018. The graph provides a clear indication of the size of core fan purchases during 2018. While there were fewer core fans than non-core fans, they purchased large volumes of tickets during the initial stages of sales, and additional purchases were made not just for themselves, but to invite non-core fans to attend as well. The existence of core fans provided significant momentum during the initial stages of ticket sales for the tournament, and it was this group that generated much of the driving force that led to "sold-out stadiums".

2019, Jan. - Start of RWC: Active purchasing by non-core fans

In January 2019, first-come first-served sales began initially for people who are not selected in the lottery, and then for the general public. Due to the large volume sold in the previous year in the lottery stage, this phase began with shortages, particularly for the most desirable matches. News reports and SNS postings made the public aware of the shortage, and as the start of the tournament drew closer and global excitement built for RWC 2019, ticket sales to non-core fans grew rapidly. This was a period of significant advances towards the goal of selling out; large numbers of tickets were purchased, and not just popular matches like those played by the Japan team. After the tournament began, strong performance by the Japan team further increased public awareness and brought another boost to non-core fan ticket purchases. As can be seen from the graph, after the tournament began, non-core fans purchased a larger percentage of tickets than core fans.

Timeline of number of tickets purchased by Japan residents



02

Why stadiums sold out

5. Summary: Why stadiums sold out

This chapter examined the results from the ticket purchaser survey and Japan resident survey to explore the background and factors leading to “sold-out stadiums”, focusing primarily on the spectators themselves. The spectators who filled the tournament’s stadiums were categorized as core fans, non-core fans and overseas fans. The contribution was particularly large for core fans, who purchased an estimated total 844,000 tickets. Their support was instrumental to the success of RWC 2019, not just for ticket sales, but also for encouraging rugby attendance around the country.

Core fans actively purchased tickets from the early stages and played a key role in selling out stadiums

Core fans already enjoyed rugby attendance before the tournament, and viewed RWC 2019, the first Rugby World Cup Japan, as a precious, once in a lifetime event. Their desire to purchase provided strong initial momentum to ticket sales and made significant contributions to “selling out stadiums”. From the very early stages, core fans purchased tickets for a wide range of matches, not just those played by the Japan team, and they actively worked to expand the circle of rugby viewing by purchasing tickets for their family members and friends (non-core fans) and attending the matches together.

Expanding the number of non-core fans who had not previously been regular rugby viewers

Non-core fans, people who had little or no contact with rugby prior to the tournament, also purchased large numbers of tickets and were a one important factor in selling out stadiums. Some of the momentum for their ticket purchases came from the fear of missing a prestigious event, and also from the easy access to local venues. Strong performance by the Japan team after the start of the tournament further increased awareness of RWC 2019 among non-core fans and led to additional ticket purchases. One of the major achievements of the event was the development of new rugby fans as evidenced by the fact that non-core fans purchased a greater percentage of tickets than core fans after the start of the tournament, and they purchased tickets to matches even if the Japan team was not playing.

International tournament brings in overseas fans

RWC 2019 was somewhat different from previous tournaments because it was the first to be held in Japan or Asia, and it brought many overseas fans to the country, creating a new layer of spectators that had not previously been seen in Japanese rugby stadiums. Overseas fans purchased large numbers of tickets to support their home country teams and to attend matches played by major rugby powerhouses. The number of spectators from overseas was roughly on par with the number of domestic Japanese core fans and non-core fans.



03

Who were the 'niwaka fans'?

Survey analysis of RWC 2019 domestic spectators

1. RWC 2019 domestic spectators: Highlights and trends
 2. RWC 2019 domestic spectators: Hours watched and SNS browsing/posts
 3. RWC 2019 domestic spectators: Viewing motivations and psychology
 4. RWC 2019 Non-core fans: Categorization and analysis
 5. Summary: Who were the RWC 2019 'niwaka fans'?
- Bonus report: RWC 2019 enthusiasm spread beyond the stadiums



03

Who were the 'niwaka fans'?

1. RWC 2019 domestic spectators: Highlights and trends

RWC 2019 excitement went beyond just filling up stadiums. The domestic television broadcast of the match where Japan beat the powerful Scotland to gain eligibility for the quarter finals, recorded a peak viewing rate of 53.7% in the Kanto region* as passion for this "once in a lifetime" event spread beyond the stadium to the general public.

The tournament also generated online excitement on SNS services like Twitter, where users became increasingly active as the tournament progressed. The #RWC2019 official hashtag on Twitter showed sharp growth mostly on the weekends when most of the matches played, and there was similar growth in the official tournament account's followers and views.

A key factor in the excitement about RWC 2019 inside and outside stadiums was a group that came to be known as 'niwaka fans'. People did not necessarily start off being rugby fans or even knowing very much about the laws and players, but they nonetheless cheered until they were hoarse. This was something not seen in past sporting events, and it caught the attention of the media. We wanted to find out more about their attributes, what motivated them to attend RWC 2019, and how they felt afterwards.

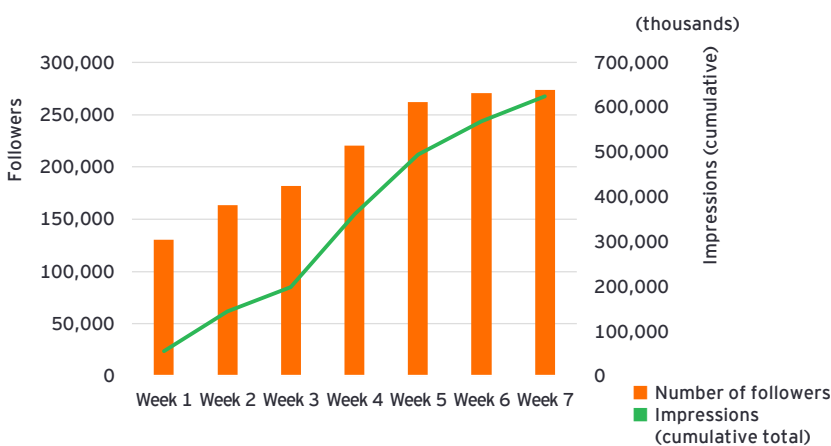
This chapter uses survey results to identify hours watched and places of viewing for tournament spectators and to understand exactly who were the 'niwaka fans' so instrumental in building excitement for the tournament.

Excitement during the event

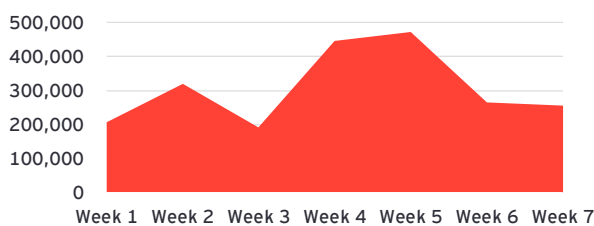
Domestic peak viewing rate of RWC 2019 Japan-Scotland match



Number of RWC 2019 official Twitter followers and impressions

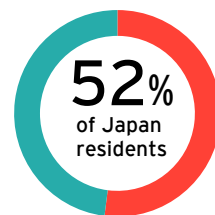


Number of #RWC2019 tweets by domestic users



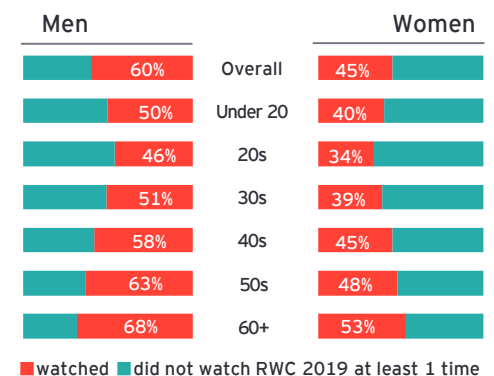
Viewing population (domestic)

People who watched RWC 2019



Percentage of people responding that they had viewed at least 1 Rugby World Cup match during the event regardless of viewing format (stadium, TV etc.). Findings from Internet survey with a sample of 80,000 domestic residents between 15 and 79 years of age. The collected sample was weighted back for population percentages by prefecture, gender and age.

People who watched RWC 2019: Gender and age breakdown



The gender and age breakdown of Japan spectators indicates that 60% of men and 45% of women watched RWC 2019. Regardless of gender, the older the age group, the higher the percentage of viewers.

(n=80,000)

* Kanto region is an area which comprises Tokyo and the six surrounding prefectures.

Exploring 'niwaka fans' assuming that they were kinds of "non-core fans"

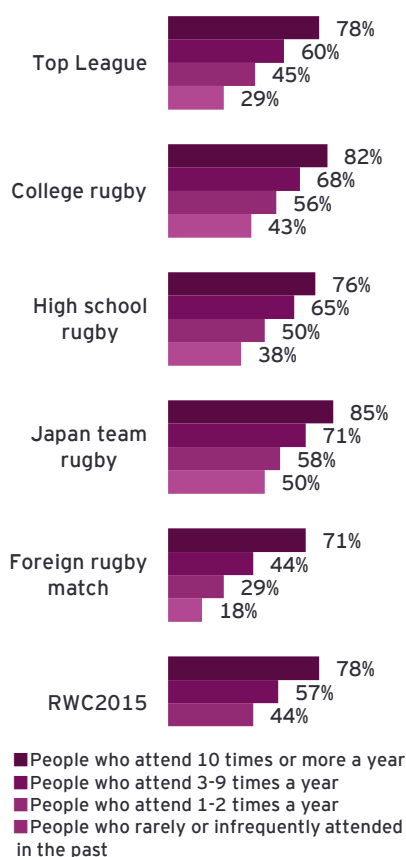
What kind of people watched RWC 2019? To find out more about spectators, this chapter follows the same approach as Chapter 2 in dividing spectators into two categories based on previous rugby experience. People who watched at least 1 rugby match a year, whether it be Top League, college rugby or something else, were defined as "core fans", while people who had never before watched rugby or rarely watched it were defined as "non-core fans". What came to be called 'niwaka fans' were the non-core fans, and their profiles and trends are analyzed and observed in this chapter.

According to survey results, core fans made up 25% of the people who viewed RWC 2019, with the remaining 75% non-core fans. This indicates that RWC 2019 event successfully attracted people who had little or no experience with rugby viewing before.

Breakdown of RWC 2019 domestic spectators - Core fans and non-core fans

Survey question: How often did you watch rugby matches before RWC 2019?

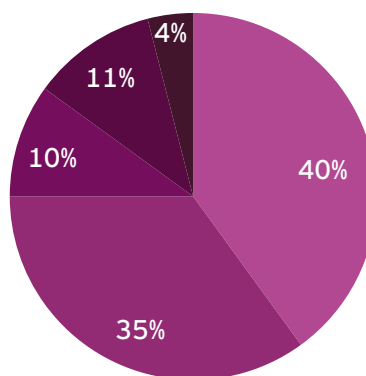
What is your experience attending/watching rugby matches? (Multiple response)



People who regularly watched rugby (regardless of Top League, college rugby etc.)

Core fans

25%

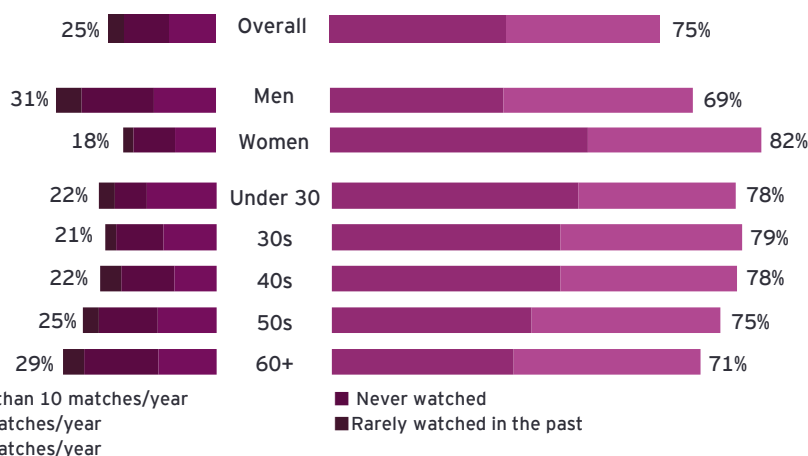


People who had never before watched rugby or rarely watched it

Non-core fans

75%

Legend for pie chart:
 - Have never attended/watched in the past (darkest purple)
 - Attend/watch 1-2 times a year (dark purple)
 - Attend/watch 3-9 times a year (medium purple)
 - Attend/watch 10 times or more a year (lightest purple)



(n=5,688)

Looking at the breakdown of core fans and non-core fans by gender, a higher percentage of women were non-core fans than men. By age group, younger generations were more likely to be non-core fans and therefore had a tendency to be unfamiliar with the sport. To investigate previous rugby experience before RWC 2019, the survey asked "What kinds of rugby matches have you previously watched?", and among those who reported previous experience, the most popular answer was tournaments in which the Japan team played, followed by college rugby. A smaller number of respondents had watched the Top League, Japan's national league.

03

Who were the 'niwaka fans'?

2. RWC 2019 domestic spectators: Hours watched and SNS browsing/posts

Spectator behavior: Focusing on hours watched

The number of spectators is the most readily understood metric of RWC 2019 excitement, but "hours watched" (i.e., the amount of time they spent watching RWC 2019), is likewise important. A total of 45 matches were played in RWC019 (excluding matches canceled due to typhoon) and many were broadcast on TV, primarily Japan team matches and those between major rugby powerhouses. All matches were also provided via on-demand streaming services.

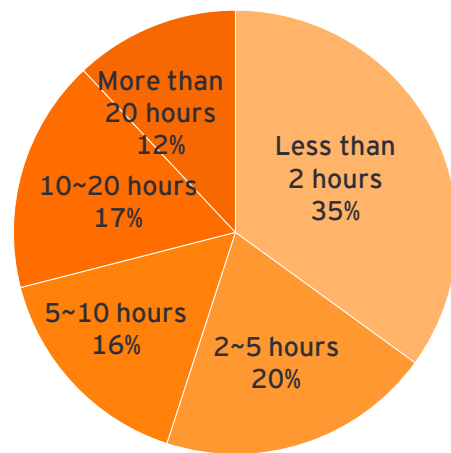
The figure below breaks down RWC 2019 hours watched at stadiums, and through public viewing and TV broadcasts by age, gender and core fan/non-core fan category.

Hours watched: Japan spectators overall

Average hours watched

6.8 hours

Average viewing was 6.8 hours per person. While people viewing less than 2 hours accounted for 35% of the total, people viewing 10 hours or more were 29%. Some 45% of core fans and 23% of non-core fans viewed 10 hours or more, which helped raise average hours watched overall. For both core fans and non-core fans, hours watched increased with age.



Hours watched: Core fans versus non-core fans (overall/by gender/by age)

| Average hours watched (h) | Core fans | | | | | | Non-core fans | | | | | Average hours watched (h) |
|---------------------------|-----------|-----|-----|-----|-----|----------|---------------|-----|-----|-----|-----|---------------------------|
| 12.1 | 23% | 22% | 15% | 14% | 26% | Overall | 38% | 22% | 17% | 15% | 8% | 5.9 |
| 13.2 | 27% | 21% | 15% | 13% | 24% | Men | 35% | 21% | 17% | 18% | 9% | 6.5 |
| 9.3 | 14% | 23% | 16% | 17% | 30% | Women | 43% | 23% | 15% | 12% | 7% | 5.2 |
| 8.4 | 13% | 13% | 19% | 23% | 32% | Under 30 | 51% | 21% | 13% | 10% | 5% | 3.9 |
| 9.0 | 18% | 15% | 14% | 21% | 32% | 30s | 43% | 27% | 15% | 11% | 4% | 4.4 |
| 12.0 | 18% | 22% | 22% | 14% | 24% | 40s | 41% | 21% | 15% | 15% | 8% | 5.6 |
| 12.9 | 25% | 25% | 12% | 11% | 27% | 50s | 36% | 20% | 20% | 16% | 8% | 6.4 |
| 13.4 | 28% | 23% | 14% | 12% | 23% | 60+ | 32% | 23% | 17% | 18% | 10% | 7.1 |

(n=5,688)

Spectator behavior: Focusing on SNS

There are more ways to enjoy a tournament than just watching it. For RWC 2019, this included finding out more about individual athletes, re-watching exciting play, and learning the stories behind key stories. RWC 2019 provided content over the official site and multiple SNS platforms, and this content was viewed by large numbers of people. As they encountered information that could not be learned just by watching matches, people developed a sense of familiarity with athletes and teams and began to share information with those around them, further increasing interest and engagement with RWC 2019.

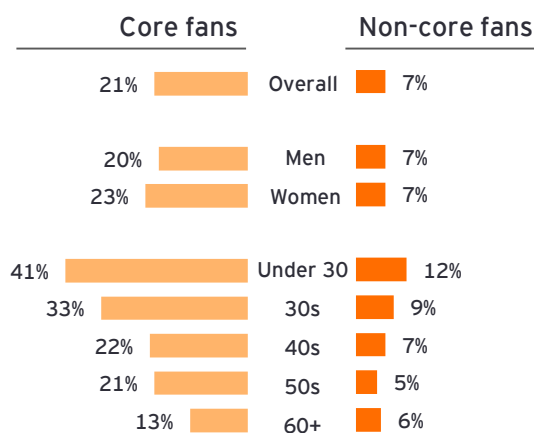
The information below shows spectator behavior in terms of official SNS browsing and SNS posts, with the most reached contents in Twitter and Instagram respectively.

Hours watched: Japan spectators overall

Percentage responding "I viewed RWC 2019 official tournament SNS at least once a week" during the event



Official SNS browsing: Core fans versus non-core fans (overall/by gender/by age)

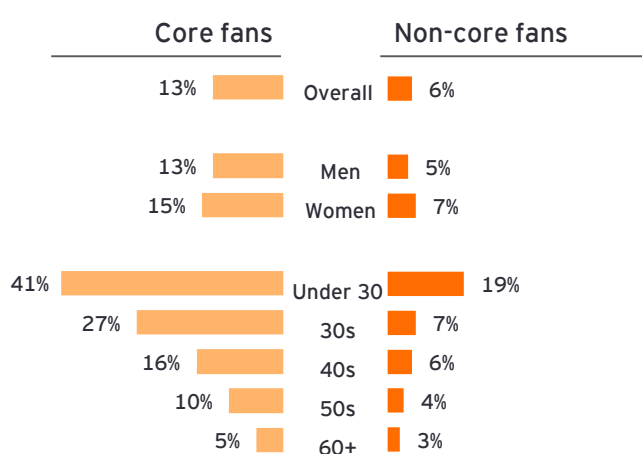


SNS posts: Japan spectators overall

Percentage responding "I posted about RWC 2019 on an SNS service at least once" during the event



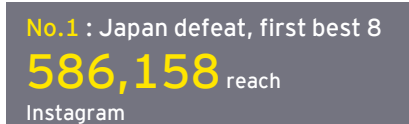
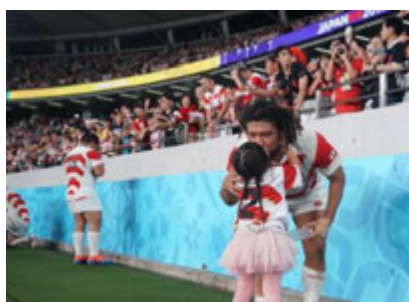
Posts to SNS services: Core fans versus non-core fans (overall/by gender/by age)



(n=5,688)

Official tournament SNS services: Twitter, Facebook, Instagram

Top reach



The percentage of people browsing official tournament SNS accounts at least once a week was highest among under 30. This trend held true for both core fans and non-core fans, but was particularly pronounced for younger generations of core fans, with roughly 40% browsing the official tournament SNS at least once a week. A similar trend was observed with SNS posts, the percentage was higher the younger the age group.

Twitter and the Twitter logo are registered trademarks of Twitter, Inc. and its affiliated companies.

03

Who were the 'niwaka fans'?

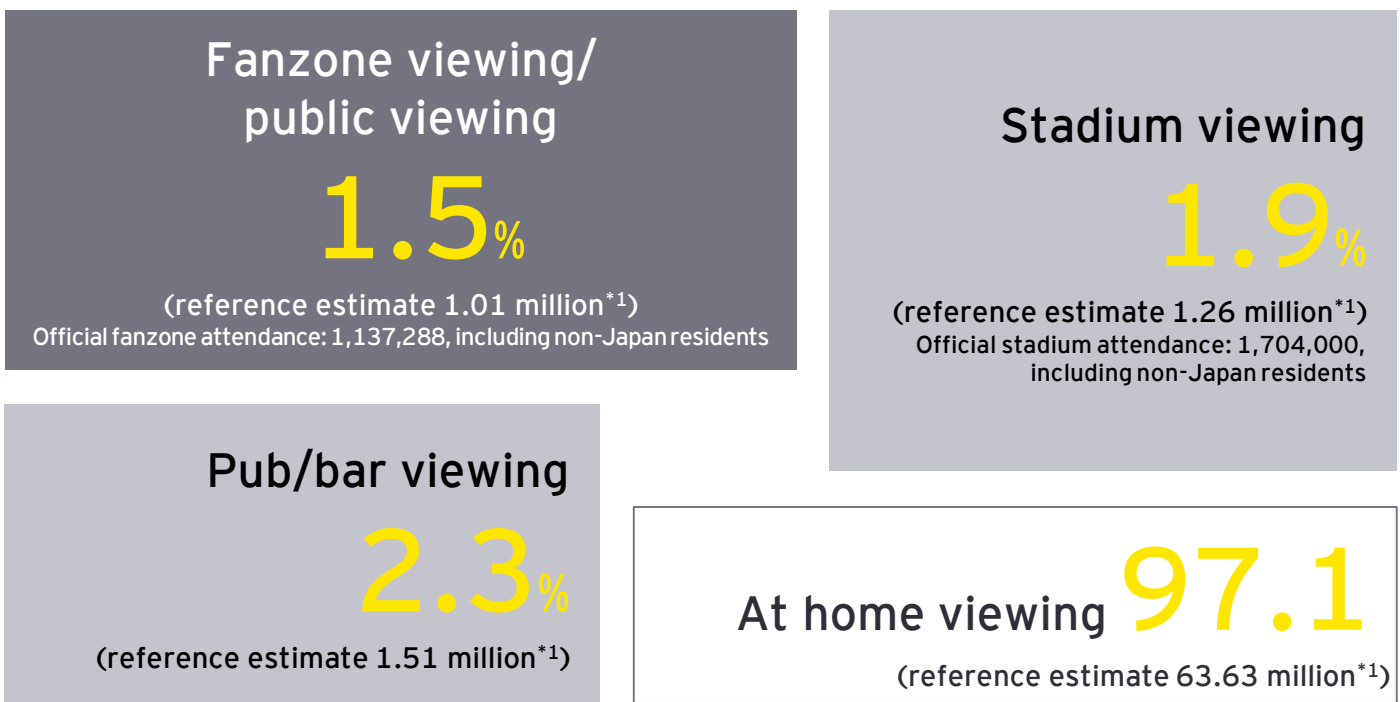
2. RWC 2019 domestic spectators: Hours watched and SNS browsing/posts

Where RWC 2019 was watched: Focusing on viewing locations

One point of focus in the analysis of spectator behavior is "viewing location". RWC 2019 was watched in many different places, not just the official venues prepared and operated specifically for the tournament (the stadiums, fanzones and public viewings) but also local sports bars and pubs.

RWC 2019 viewing locations

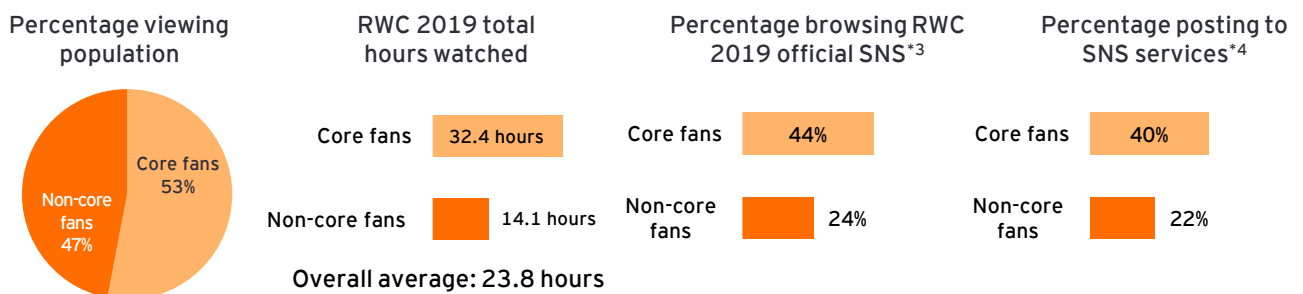
Survey question: Where did you watch RWC 2019? (multiple response)



Japan residents (126 million*²)
(n=80,000)

Stadium spectators

Among people responding that they attended RWC 2019 at stadiums, 53% were core fans, and indeed, this was the place of viewing with the highest core fan percentage. Non-core fans who attended matches in stadiums recorded a total of 14.1 hours watched, nearly triple the level of non-core fans viewing at home on TV.



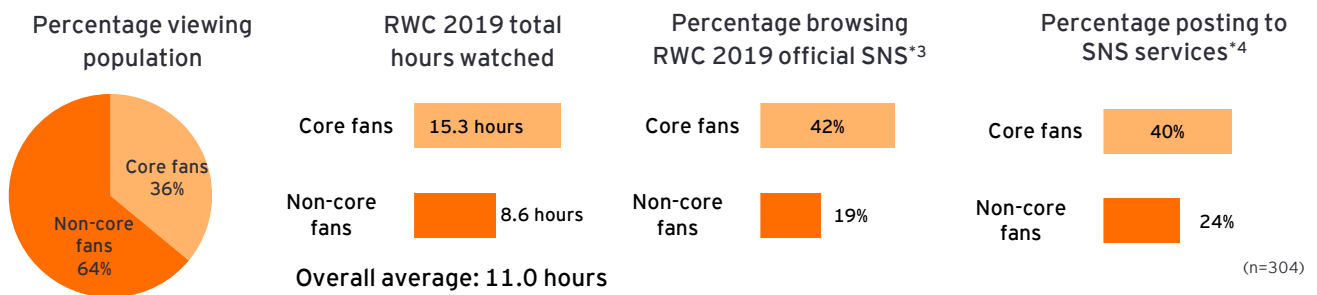
(n=624)

*1 Arithmetical estimate found by multiplying the Japan resident population by the response rate. This is a reference value that does not account for differences between the survey sample (age 15-79) and actual population structure

*2 Japan resident population as at 1 September 2019

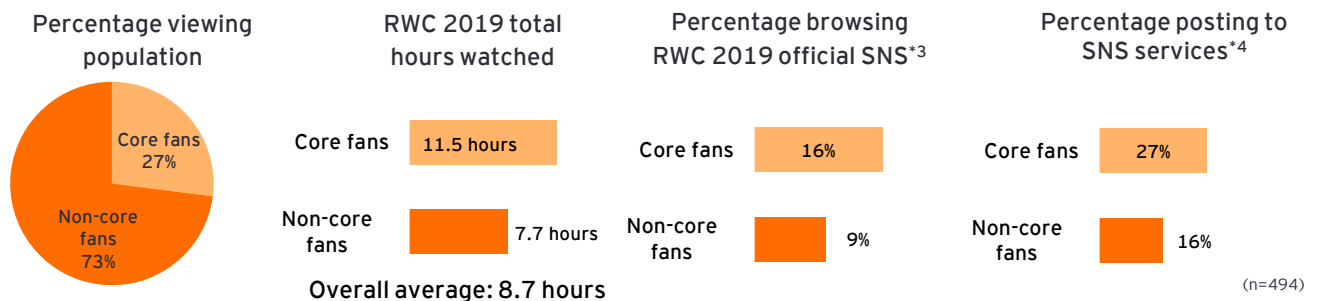
Fanzone and public viewing spectators

Non-core fans accounted for 64% of people viewing RWC 2019 at fanzones and public viewings, and this place of viewing had one of the highest percentages of non-core fans. Both core fans and non-core fans who viewed the tournament at these locations had high SNS posting rates.



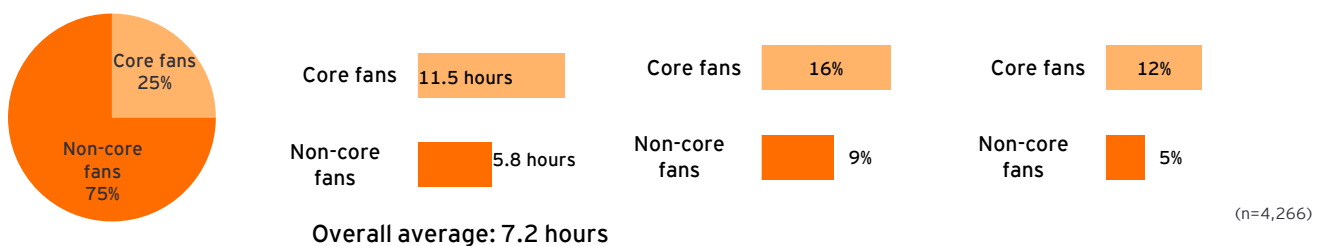
Pub/bar spectators

Non-core fans accounted for 73% of the people responding that they viewed RWC 2019 at pubs and bars, and this place of viewing had one of the highest percentages of non-core fans. The location provided for easy viewing of the matches while enjoying food and drink, which is presumably why so many non-core fans were attracted.



At home spectators

Non-core fans accounted for 75% of people saying they viewed RWC 2019 only at home, and this place of viewing had the highest percentage of non-core fans. Television viewing appears to have been fairly approachable even for people with no previous rugby experience.



*3 Percentage of people browsing Twitter, Facebook or Instagram at least once a week

*4 Percentage of people posting about RWC 2019 on Twitter, Facebook, Instagram or other SNS service at least once

03

Who were the 'niwaka fans'?

3. RWC 2019 domestic spectators: Viewing motivations and psychology

The survey found that 52% of Japan residents viewed RWC 2019. Some 75% of these people are the non-core fans who had never watched rugby before or only watched it a few times, and their motivations for viewing were presumably different from those of core fans who already liked rugby. The survey conducted for this report included several questions that directly and indirectly asked about viewing motivation and psychology, and we used the findings to try to analyze spectators. This section reviews results for the direct questions, "Motivations and reasons for watching RWC 2019" and "Attractions and values perceived in RWC 2019 tournament".

Motivations and reasons for watching RWC 2019

Survey question: Select up to 5 major motivations and reasons for watching RWC 2019.



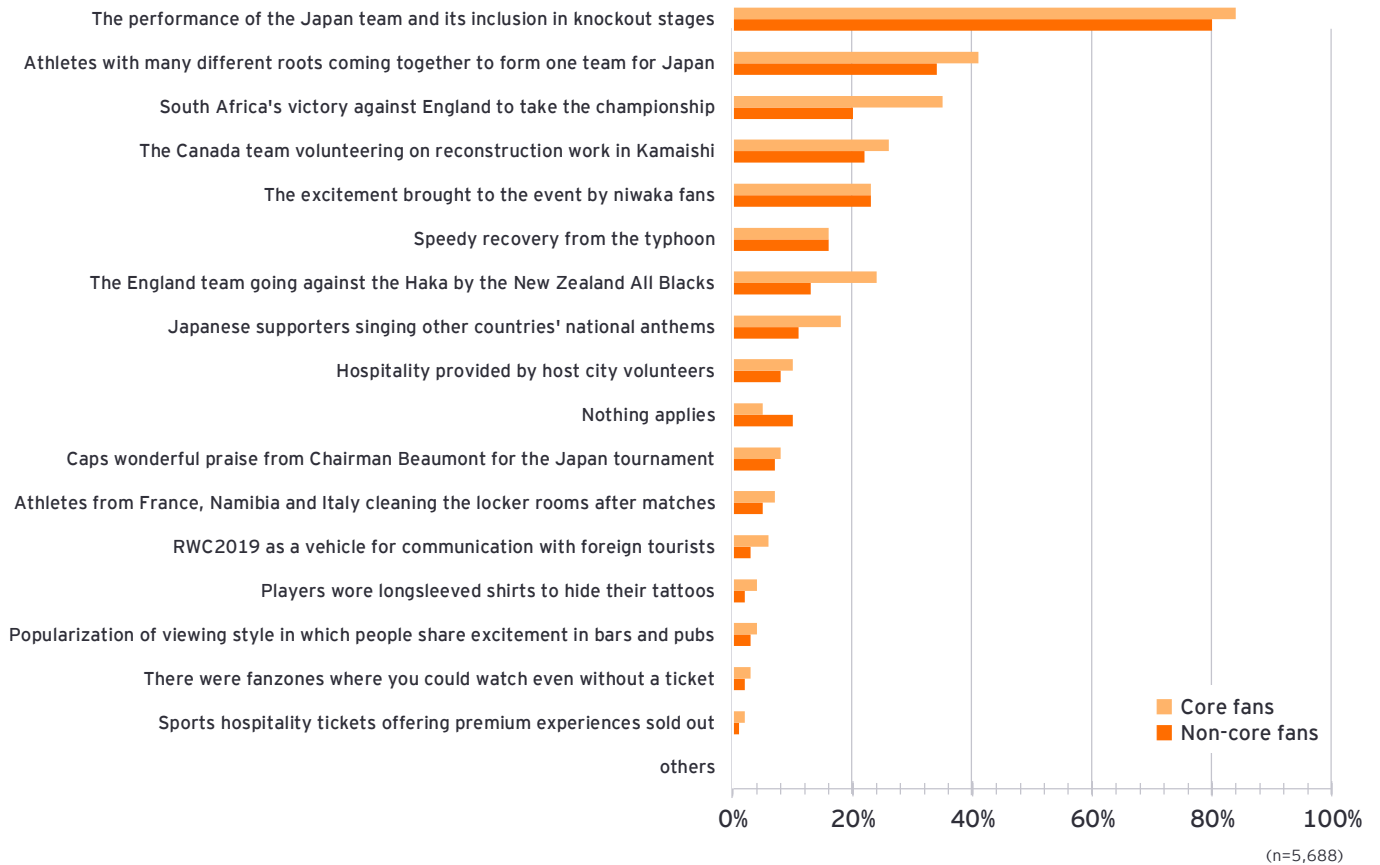
The top viewing motivation for both core fans and non-core fans was "I wanted to cheer the Japan team". The second for core fans was "I like or am/became interested in rugby". for non-core fans, "I wanted to share the excitement with friends and family". Passive motivations like "I saw how excited everyone else was" and "I saw information on news shows, variety programs and other media" also stood out for non-core fans.



Rugby World Cup 2019™ - Review of outcomes

Attractions and values perceived in RWC 2019 tournament

Survey question: Select up to 5 stories in which you perceived attraction and value for RWC 2019.



The survey asked respondents "What were stories in which you perceived attraction and value for RWC 2019"? Roughly 90% said, "The performance of the Japan team in making it to the knockout stages", which was the most common answer for both core fans and non-core fans. The next most popular response was "Athletes with many different roots came together to form ONE TEAM for Japan". The survey did not find any major differences in responses between core fans and non-core fans, though fewer non-core fans selected events that occurred after the defeat of the Japan team like "South Africa defeating England in the championship" and "The England Team resisting the haka", indicating that the focus for most non-core fans was the Japan team.



03

Who were the 'niwaka fans'?

4. RWC 2019 Non-core fans: Categorization and analysis

To this point in the chapter, we have confirmed RWC 2019 Japan spectator profiles and a viewing behavior from the following perspectives.

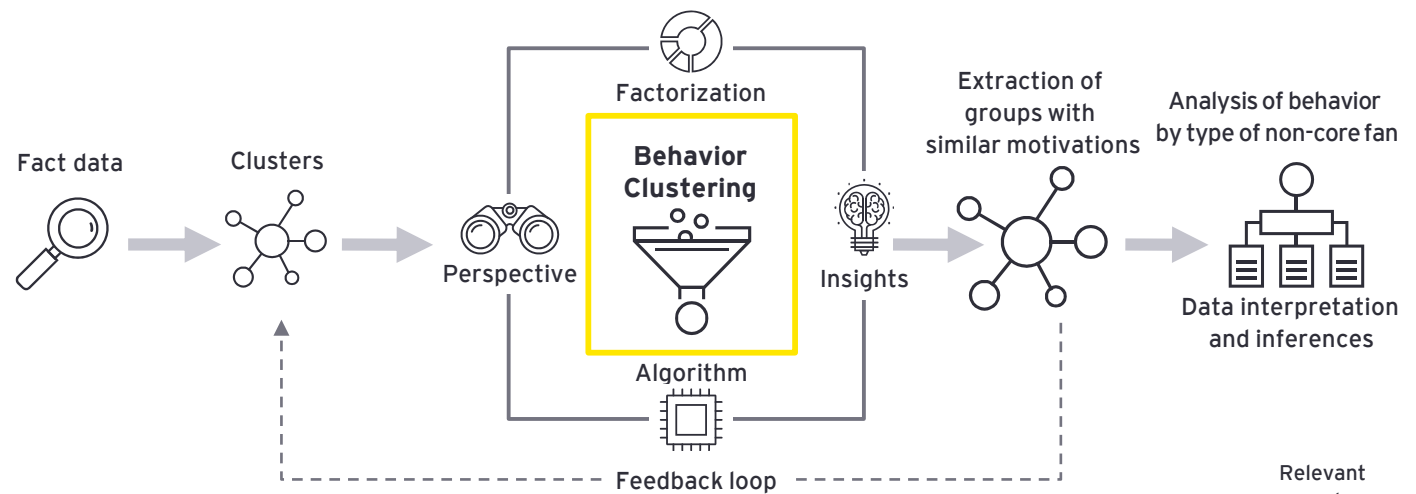
- ▶ How many people viewed RWC 2019 and what were the percentages of core fans and non-core fans?
- ▶ Who were RWC 2019 spectators in terms of rugby experience, hours watched and viewing locations?
- ▶ What were the motivations of RWC 2019 spectators to watch the tournament, and which stories did they find particularly attractive or valuable?

Using the survey data to tabulate attributes and hours watched for core fans and non-core fans enabled us to visually represent RWC 2019 spectators and identify basic characteristics and trends for core fans and non-core fans.

On top of these basic observations, we used statistical approaches to analyze viewing profiles and both gain a deeper understanding of the non-core fans who accounted for 75% of all spectators and obtain insights that will contribute to the spread of rugby in Japan. This group contains a mixture of different characteristics, and by gathering similar characteristics together into a number of types we can begin to efficiently draw a picture of these people and obtain insights into useful measures for them going forward. On this basis, we used variables obtained from the survey like RWC 2019 viewing motivation to categorize non-core fans into 5 types of non-core fan, one example being the "Japan team supporter". These categories and the clearer picture they give of spectators helped us to search for an answer to the question posed in this chapter, "Who were the 'niwaka fans'?"

Non-core fans were categorized into Types A-E as shown below based on data similarities with no randomness. However, the interpretation of the data, including the naming, does involve inference. From the next page onward we identify the key features of the five types, explore their perceptions and psychologies, and study their satisfaction and future intentions to watch rugby in light of the preferences and behavior patterns revealed.

Analyzing viewing profiles to identify non-core fan types



RWC 2019 Non-core fans ('niwaka fans')
Categorization into 5 types based on viewing motivation

| Type | Description | Relevant percentage |
|----------|--|---------------------|
| A | Japan team supporter People who watched RWC 2019 with national pride | 30% |
| B | Sports lover People who discovered the excitement of rugby through RWC 2019 | 17% |
| C | RWC enthusiast People who fully enjoyed the tournament and drove the RWC 2019 boom | 7% |
| D | Sociability motivated People who enjoyed RWC 2019 excitement for their communication | 17% |
| E | Trend follower People who were influenced by those around them to watch the event | 29% |

A Japan team supporter

People who watched RWC 2019 with national pride

Characteristics of this type

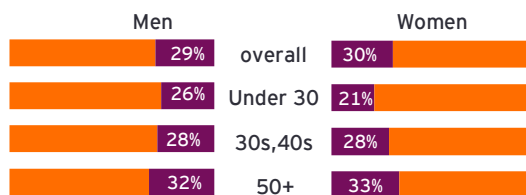
Based on the results of a survey of RWC 2019 viewing motivations, we categorized people whose primary purpose was to cheer the Japan team as 'Japan team supporter', and this type accounted for 30% of all non-core fans. This type does not have high levels of interest in rugby itself or specific athletes, although 65% of them already began watching with the Japan-Russia match, which was the first games of the tournament. They were type of people who watched RWC 2019 with national pride.

This type of non core fan accounted for 30% of spectators watching the tournament at home on TV., and a preference for easy viewing formats. Another feature of this type is the emphasis on the entertainment aspects of sports viewing. They presumably considered the experience of cheering the Japan team at the first Rugby World Cup ever to be held in Japan as a form of "once in a lifetime" entertainment.

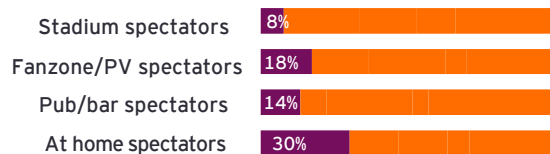
When asked about future intentions to watch rugby, they were not positive about viewing Top League matches, but were very interested in the Japan team matches at the Olympics and World Cup. Some 76% responded "I would watch as long as it is free", and most will probably prefer television viewing as was the case for RWC 2019.

Relevant percentage **30%**

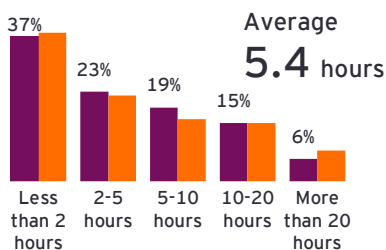
Percentages by gender and age



Breakdown by place of viewing

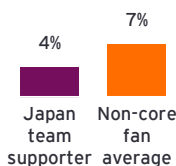


RWC 2019 hours watched



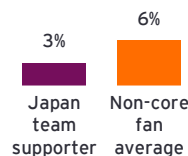
Official tournament SNS browsing*1

*1: Percentage of people viewing the official tournament SNS (Twitter, Facebook, Instagram) at least once a week

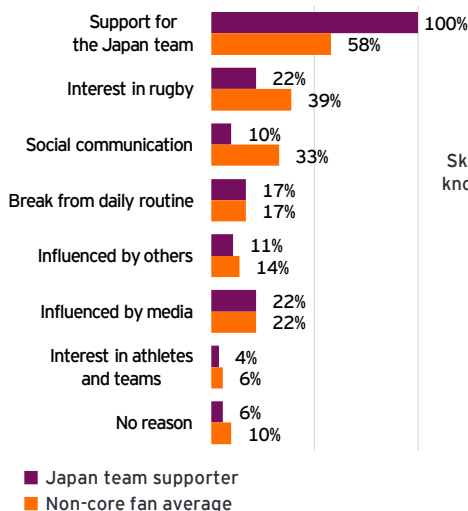


SNS posting*2

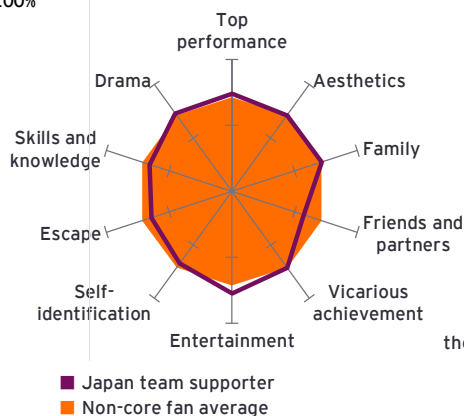
*2: Percentage of people posting about RWC 2019 on Twitter, Facebook, Instagram or other SNS service at least once



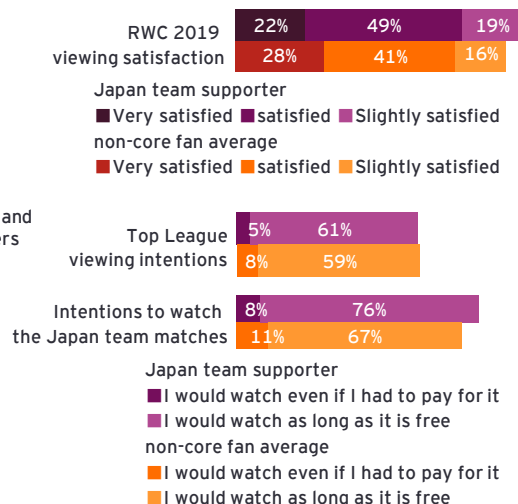
RWC 2019 viewing motivation factors



Factors emphasized in general sports viewing*3



RWC 2019 viewing satisfaction and future intentions to watch rugby*4



*3: Created using the non-core fan average selection rate as 50%

*4: Ranked at 7 levels: very satisfied, satisfied, slightly satisfied, Neutral, slightly dissatisfied, dissatisfied, and very dissatisfied

(n=4,047)

B

Sports lover

People who discovered the excitement of rugby through RWC 2019

Characteristics of this type

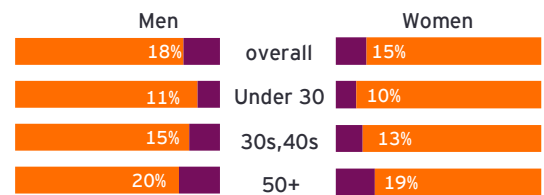
There were people whose RWC 2019 viewing motivations were more content-oriented ("I am interested in rugby, or I became interested in rugby" and "I wanted to watch powerful and exciting play live"). They were categorized as 'sports lover', and they accounted for 17% of non-core fans.

This type of non-core fan spent 8.6 hours watching the tournament, above the average for non-core fans. They had not previously viewed rugby, but were attracted to the sport by RWC 2019, attended matches even if the Japan team was not playing, and presumably enjoyed watching the world's powerhouse teams play.

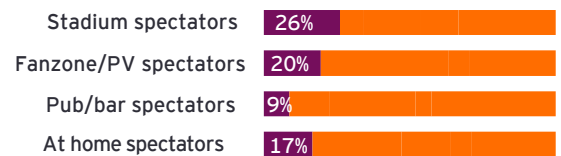
Most of the people in this group had positive intentions about future rugby viewing. Their interest was probably heightened by watching the powerful, world-class play of RWC 2019 and encountering the ruggie spirit of fair play and devoted. This group already enjoyed sports viewing, and it is hoped that the tournament provided the trigger for rugby viewing to become more of a habit.

Relevant percentage **17%**

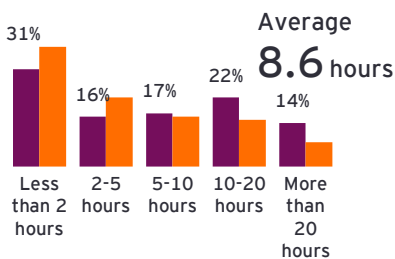
Percentages by gender and age



Breakdown by place of viewing

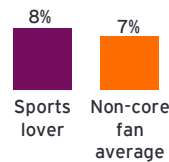


RWC 2019 hours watched



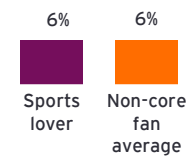
Official tournament SNS browsing*1

*1: Percentage of people viewing the official tournament SNS (Twitter, Facebook, Instagram) at least once a week

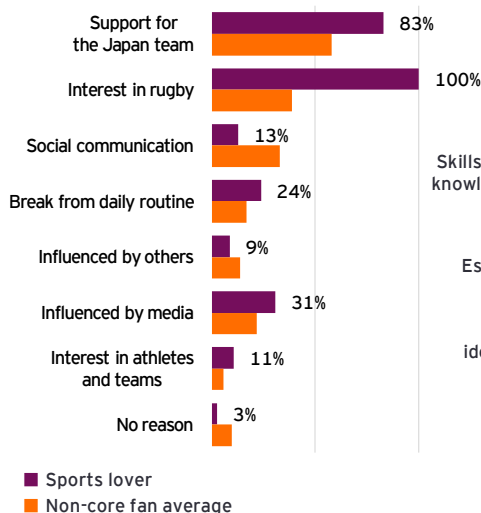


SNS posting*2

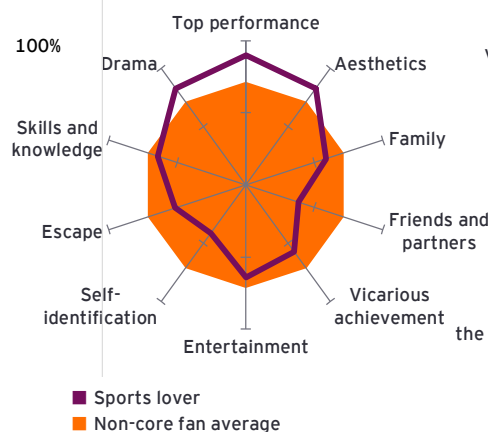
*2: Percentage of people posting about RWC 2019 on Twitter, Facebook, Instagram or other SNS service at least once



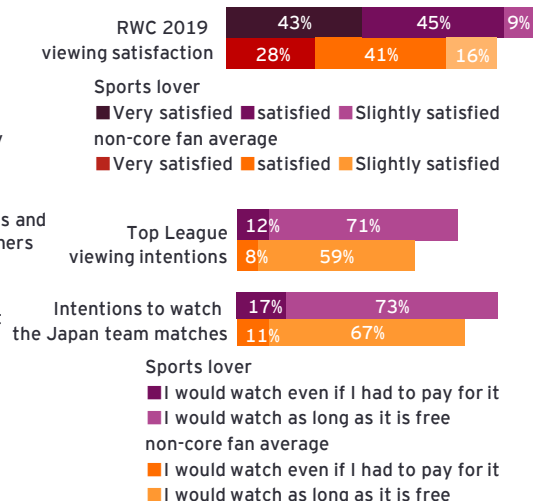
RWC 2019 viewing motivation factors



Factors emphasized in general sports viewing*3



RWC 2019 viewing satisfaction and future intentions to watch rugby*4



*3: Created using the non-core fan average selection rate as 50%

*4: Ranked at 7 levels: very satisfied, satisfied, slightly satisfied, Neutral, slightly dissatisfied, dissatisfied, and very dissatisfied

(n=4,047)



RWC enthusiast

People who fully enjoyed the tournament and drove the RWC 2019 boom

Characteristics of this type

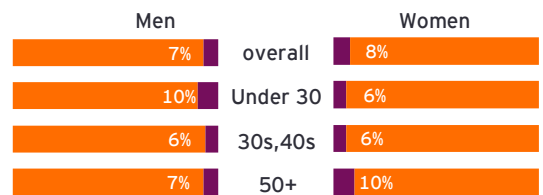
In addition to cheering the Japan team and interest in rugby, people who responded that their viewing motivation was "I want to share the exciting feeling with those around me" were categorized as 'RWC enthusiast', and they accounted for 7% of non-core fans.

This group on average spent 9.2 hours viewing the tournament, which was on par with core fans. Indeed, 19% watched for more than 20 hours, and the large number of people who were "hooked" on rugby as a result of the tournament is one of the characteristics of this group. Among the five types, this category had the highest percentage of people regularly accessing the official tournament SNS to obtain up-to-date information and making their own rugby-related posts. They made significant contributions to expanding the RWC 2019 boom.

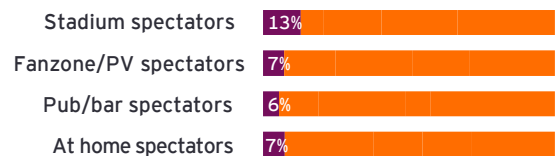
The tournament was their first encounter with the excitement of rugby, but they cheered for a large number of matches and shared their excitement with those around them, further building momentum for the tournament. This group may be the true 'niwaka fans' in that they jumped into a new, previously unknown world, and fully enjoyed its attractions. Both satisfaction and future intentions to watch rugby were high, and when asked about Japan team matches, 25% said "I would watch even if I had to pay for it".

Relevant percentage **7%**

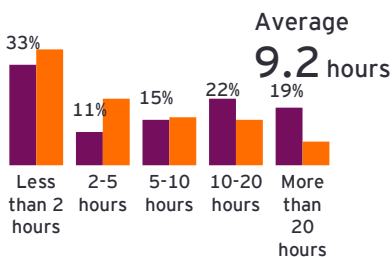
Percentages by gender and age



Breakdown by place of viewing

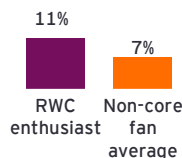


RWC 2019 hours watched



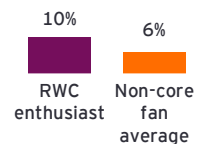
Official tournament SNS browsing*1

*1: Percentage of people viewing the official tournament SNS (Twitter, Facebook, Instagram) at least once a week

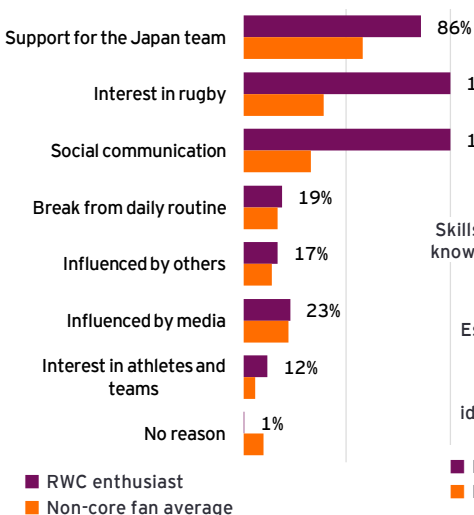


SNS posting*2

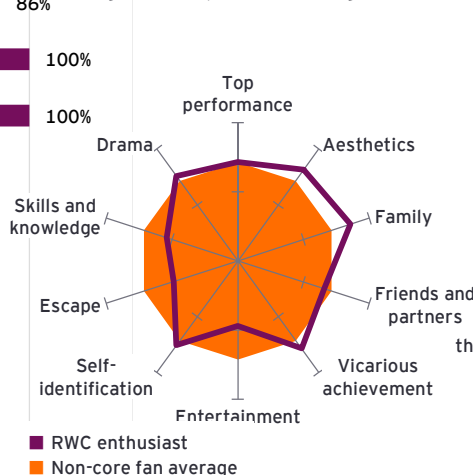
*2: Percentage of people posting about RWC 2019 on Twitter, Facebook, Instagram or other SNS service at least once



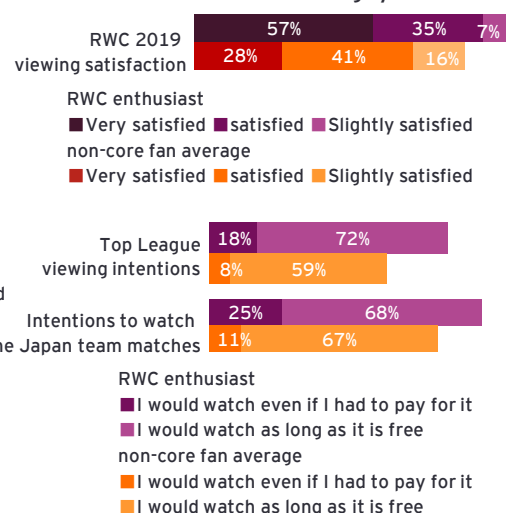
RWC 2019 viewing motivation factors



Factors emphasized in general sports viewing*3



RWC 2019 viewing satisfaction and future intentions to watch rugby*4



*3: Created using the non-core fan average selection rate as 50%

*4: Ranked at 7 levels: very satisfied, satisfied, slightly satisfied, Neutral, slightly dissatisfied, dissatisfied, and very dissatisfied

(n=4,047)

D

Sociability motivated

People who enjoyed RWC 2019 excitement for their communication

Characteristics of this type

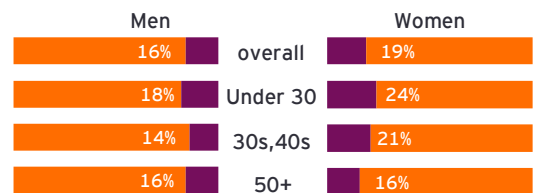
'Sociability motivated' were people whose responses indicated that social interaction was a large part of the motivation for watching the tournament, for example, "I wanted to enjoy the tournament as a topic of conversation and interaction", and "The tournament was a topic of conversation and something I needed for communication purposes". They accounted for 17% of non-core fans.

People in this category had little interest in rugby itself but were sensitive to new, popular events, and a larger percentage than average non-core fans both accessed official tournament SNS and posted to SNS services themselves. Most of the people who viewed in fanzones, pubs and bars are categorized in this type.

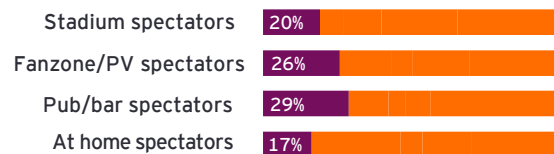
The viewing satisfaction was the same as the average for non-core fans, as were future intentions to watch rugby. Viewed from a different perspective, RWC 2019 was enjoyed at a wide range of locations, including fanzones and pubs, and brought in even people with little interest in rugby, which indicates that the tournament was successful in reducing the hurdles and providing enjoyment for everyone.

Relevant percentage **17%**

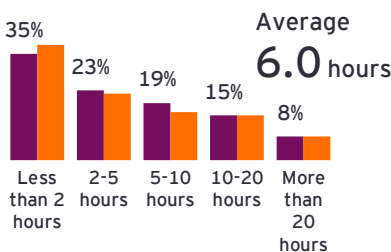
Percentages by gender and age



Breakdown by place of viewing

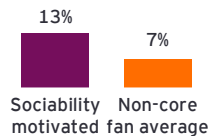


RWC 2019 hours watched



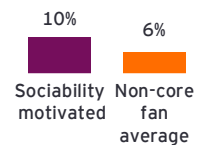
Official tournament SNS browsing*1

*1: Percentage of people viewing the official tournament SNS (Twitter, Facebook, Instagram) at least once a week

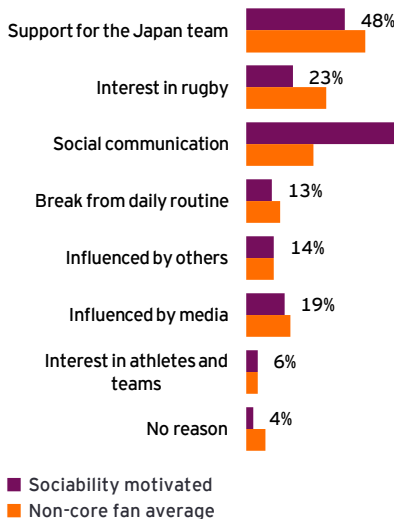


SNS posting*2

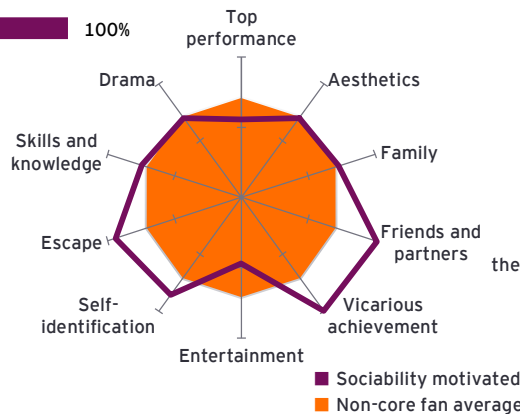
*2: Percentage of people posting about RWC 2019 on Twitter, Facebook, Instagram or other SNS service at least once



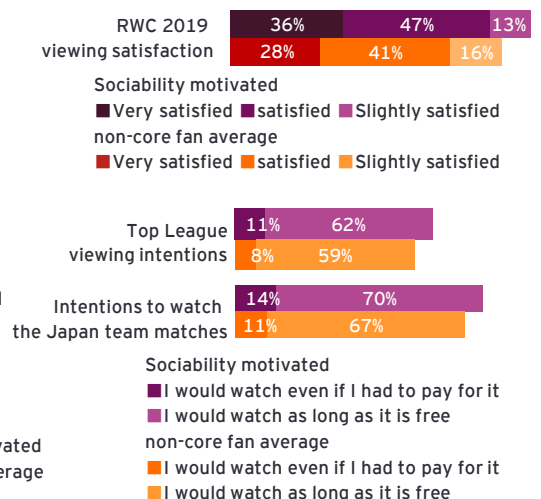
RWC 2019 viewing motivation factors



Factors emphasized in general sports viewing*3



RWC 2019 viewing satisfaction and future intentions to watch rugby*4



*3: Created using the non-core fan average selection rate as 50%

*4: Ranked at 7 levels: very satisfied, satisfied, slightly satisfied, Neutral, slightly dissatisfied, dissatisfied, and very dissatisfied

(n=4,047)



Trend follower

People who were influenced by those around them to watch the event

Characteristics of this type

'Trend follower' had more passive viewing motivations. They watched RWC 2019 because they were invited by friends, family members and others around them, or they were influenced by the excitement of those around them.

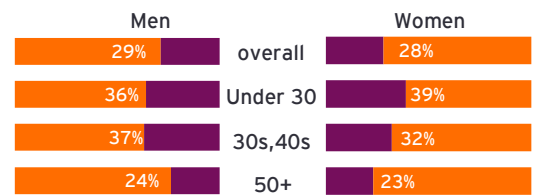
This category accounted for 29% of non-core fans. There were zero who responded that they wanted to cheer the Japan team, and only a tiny 2% indicated interest in athletes or teams.

Despite the lack of interest in the outcome of Japan team matches or rugby itself, this type of non core fan accounted for 33% of spectators in stadiums. Presumably, they were motivated by the enthusiasm of rugby fans and their own sensitivity to trends.

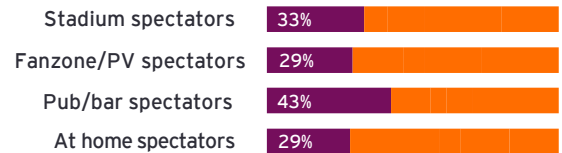
Satisfaction and future viewing intentions were both lower than the average for non-core fans. However, this group was by no means positive about rugby viewing from the start, and the fact that more than half replied "I want to watch Japan team matches regardless of whether I have to pay for them" can be taken as an indication that RWC 2019 made a considerable contribution to the spread of rugby in Japan.

Relevant percentage **29%**

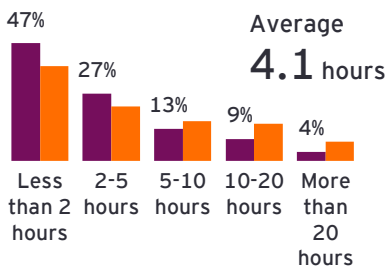
Percentages by gender and age



Breakdown by place of viewing

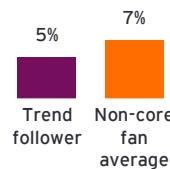


RWC 2019 hours watched



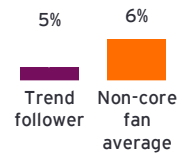
Official tournament SNS browsing*¹

*1: Percentage of people viewing the official tournament SNS (Twitter, Facebook, Instagram) at least once a week

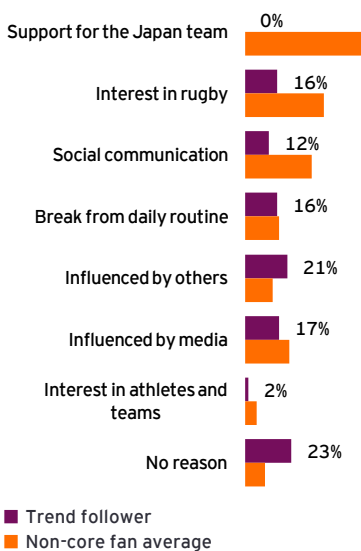


SNS posting*²

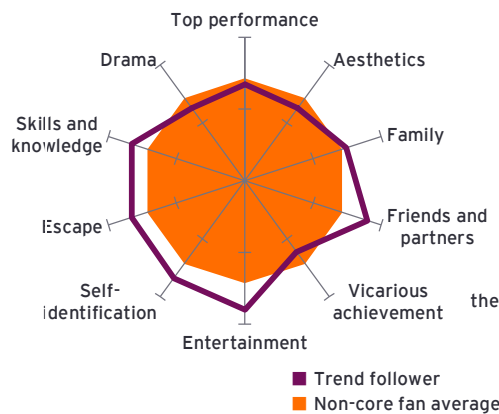
*2: Percentage of people posting about RWC 2019 on Twitter, Facebook, Instagram or other SNS service at least once



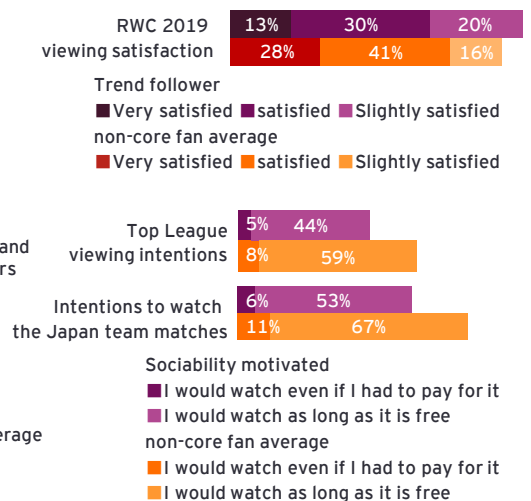
RWC 2019 viewing motivation factors



Factors emphasized in general sports viewing*³



RWC 2019 viewing satisfaction and future intentions to watch rugby*⁴



(n=4,047)

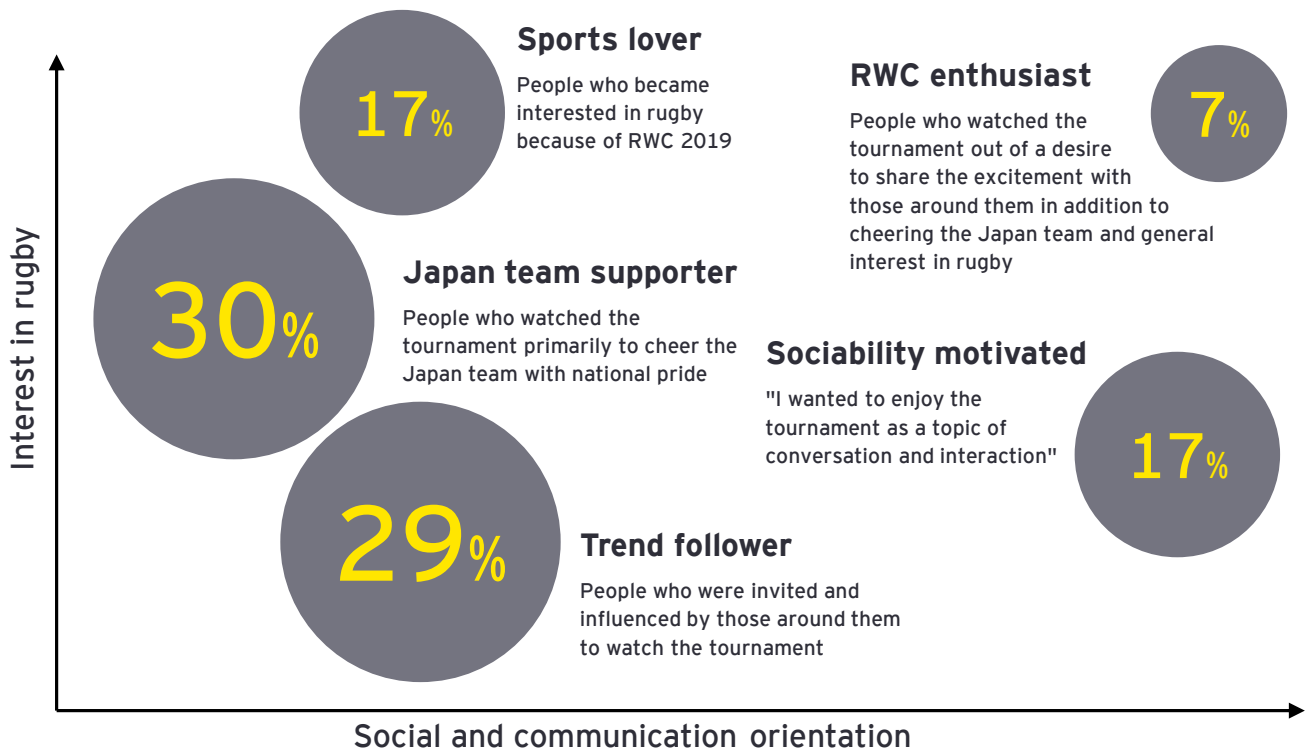
03

Who were the 'niwaka fans'?

5. Summary: Who were the RWC 2019 'niwaka fans'?

This chapter focused on the spectators who were significant drivers of the RWC 2019 excitement. We divided spectators into 'core fans' and 'non-core fans' to compare their hours watched, viewing locations, SNS browsing and posting, and other viewing behavior, and also used viewing motivations and stories that they found valuable or attractive to gain insights into their viewing psychology. Non-core fans who had little if any experience with rugby prior to the tournament accounted for 75% of all spectators, which indicates that RWC 2019 attracted the attention of the broad-spectrum of people throughout Japan and demonstrates the significance of the tournament as the first Rugby World Cup to be held in Japan.

During the latter half of the chapter, we analyzed the non-core fans to explore 'niwaka fans' in greater detail as the key people who built excitement for the tournament and helped to turn it into a social phenomenon. Data similarity was used to categorize non-core fans into five types based on similar behavior patterns.



By analyzing these viewing profiles, we found that 'niwaka fans', while instrumental in building excitement for RWC 2019, were not a homogenous group and indeed had many different levels of sports viewing experience and viewing motivations. For other sports events, fans tend to be fixed, and one of the most significant outcomes of RWC 2019 was the opportunity it provided large numbers of people who had little or no experience with rugby to encounter the sport.

For example, 'sports lover' who enjoy sports as a matter of course were able to discover the attractions of rugby during the tournament and will presumably continue to watch it. There were also 'sociability motivated', who enjoyed RWC 2019 in fanzones and pubs for its trendiness, and the creation of this new relationship with sports is another achievement of the tournament.

The greatest achievement of the 'niwaka fan' phenomenon, however, was the 'RWC enthusiast' who were comparable to core fans in the amount of time they spent watching the tournament and spread their enthusiasm for the event on SNS services. Despite a lack of familiarity with rugby's rules and history, they were able to boldly jump into this new world and fully enjoy the tournament. Indeed, it was this group that drove the excitement surrounding RWC 2019. The 'RWC enthusiast' demonstrated high levels of viewing satisfaction and future rugby viewing intentions, which indicates that this type of non-core fan has the potential to grow and develop into core rugby fans in the future.

Looking back on RWC 2019, Sir Bill Beaumont, the chairman of World Rugby said, "This was an extraordinarily innovative tournament that brought new spectators to rugby". As interests and enjoyments become increasingly diverse and communities increasingly fragmented, RWC 2019 brought a common topic of conversation to people throughout Japan and an opportunity for many people to enjoy an "once in a lifetime" event, and in that, it was a unique and unprecedented tournament. It is hoped that the tournament will serve as a trigger to spread and establish the culture of sports in Japan.



Bonus report: Enthusiasm for RWC 2019 spread beyond the stadiums

People who enjoyed watching rugby at fanzones and public viewings

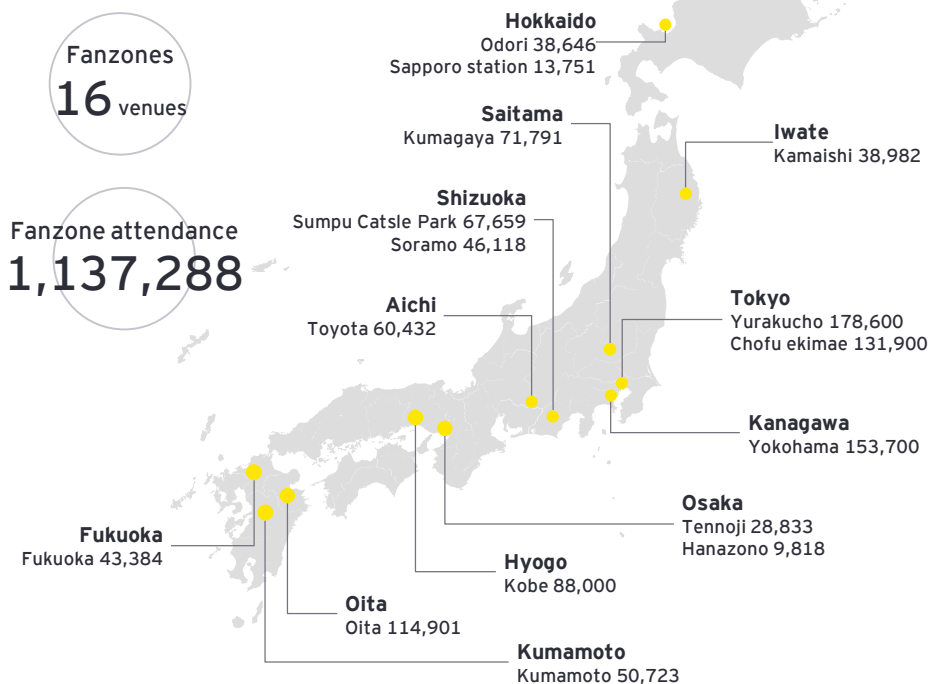
Places where they could enjoy the festive atmosphere together with domestic and international fans

People of many nationalities, wearing rugby jerseys that they liked regardless of their relationship with the team, came together to view matches on large screens. They also enjoyed the stage events before and after the matches, often with a beer in their hand. For RWC 2019, the 12 host cities set up 16 fanzones where they offered programs that highlighted local customs and flavors.

Fanzones ("FZ" below) attracted a wide range of people, in part because admission was free. Some were core fans unable to purchase the tickets they wanted but unwilling to give up on watching exciting matches, some were 'niwaka fans' who wanted to cheer the Japan team or enjoy the festive atmosphere. Rugby has always been considered a sport that allows for a variety of values and ways of enjoyment. The FZs were a distillation of rugby's wide appeal. They were filled throughout the tournament, recording a total of 1,137,000 guests, a new record high for Rugby World Cup.

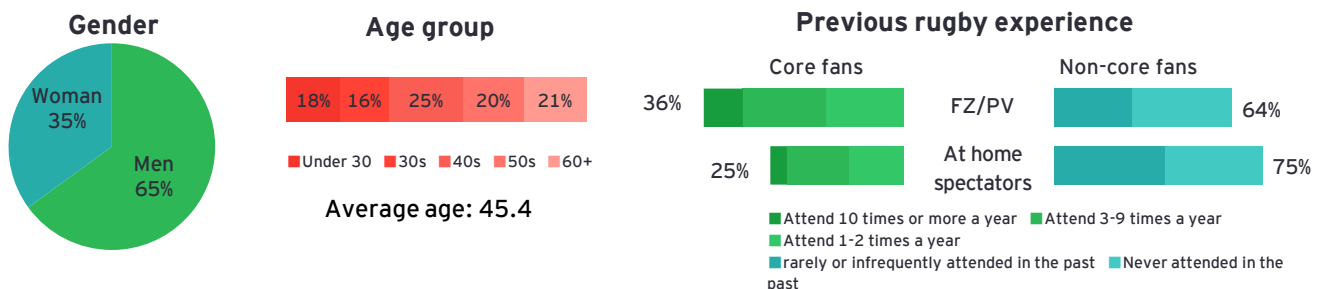
Like FZs, there were also public viewings (PV below) around the country; those registered with the Organizing Committee themselves numbered 237 venues (excluding FZs), and they too contributed greatly to the RWC 2019 excitement. In this "Bonus Report", we use data from the Japan resident survey to draw a picture of the people who watched the tournament at FZs and PVs.

Fanzones number of admissions



Basic information on FV/PV spectators

Core fans accounted for 36% of the people who responded that they experienced RWC 2019 at FZs and PVs. The percentage of core fans was higher than spectators watching on TV at home.



Bonus report: Enthusiasm for RWC 2019 spread beyond the stadiums

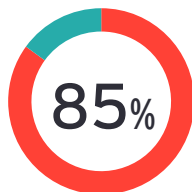
Viewing profiles

- ▶ FZ/PV spectators stayed an average of 5.2 hours, and 85% were repeaters, watching at least 2 matches.
- ▶ Asked about accompanying people, the top answer for FZ/PV was "Just me", at 30%.

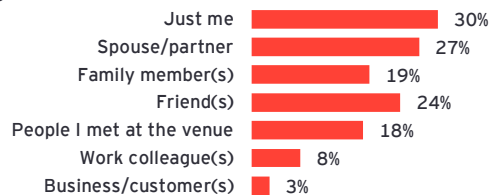
Total time in FZs/PVs*1
5.2 hours

Total RWC 2019 hours watched*1
11.0 hours

Percentage of people watching at least 2 matches at FZs and PVs



Accompanying spectators*2



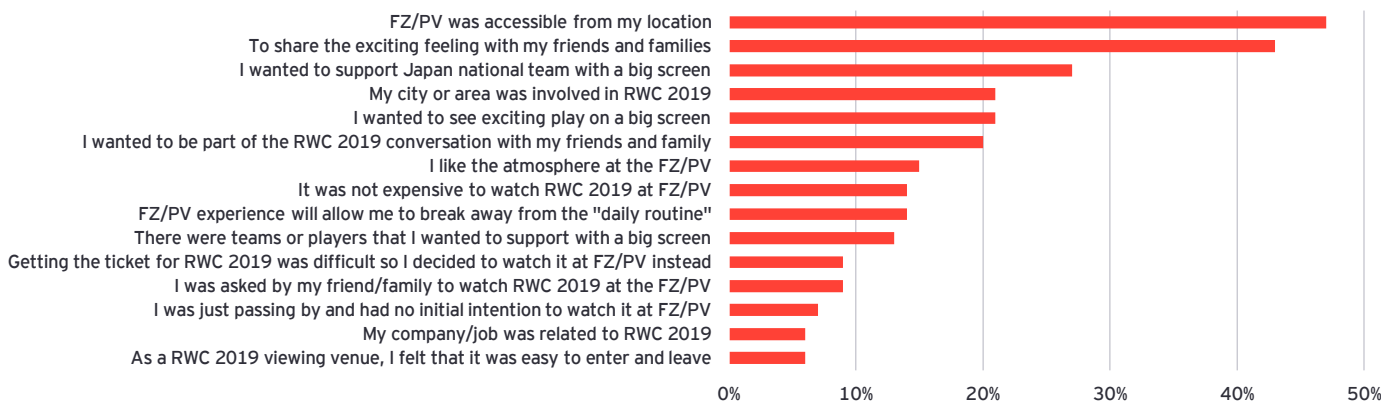
*1 Tournament period total
*2 Who did you watch with at FZs/PVs? (multiple response)

Viewing motivations and future intentions to watch rugby

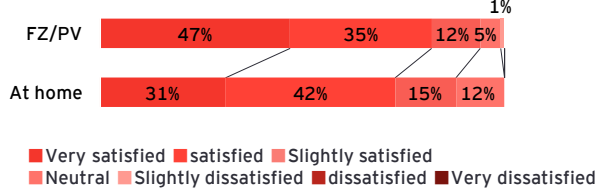
- ▶ The top reason for watching at FZs/PVs was "accessible from my location", and nearly 50% of respondents said that they chose FZs/PVs because of easy access.
- ▶ Compared to those who only watched on TV at home, FZ/PV spectators had higher satisfaction with the tournament, and 34% responded that they wanted to watch the Top League even if they had to pay for it. FZs and PVs therefore helped to attract new rugby fans during the tournament.

Reasons for watching at FZs and PVs

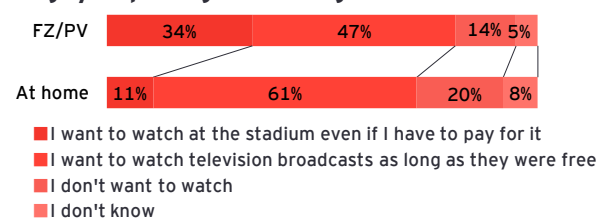
Survey question: Select the 5 most important reasons for viewing at pubs and bars.



Tournament satisfaction



Rugby Top League viewing intentions



How were FZs/PVs accepted by people?

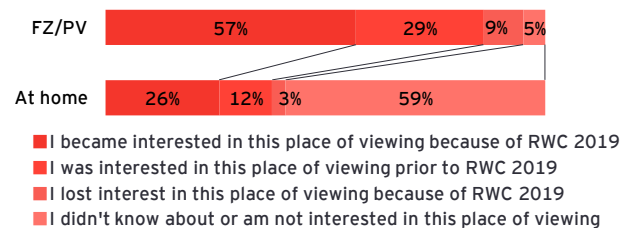
FZs and PVs were featured widely in the media as places symbolic of the excitement about RWC 2019 outside of the stadiums. We investigated people's awareness of and interest in FZs and PVs.

The "Interest in FZs and PVs" graph indicates that more than half of actual FZ/PV spectators "became interested in FZs and PVs because of RWC 2019".

26% of non-FZ/PV spectators responded that they "became interested because of the tournament", which indicates that RWC 2019 FZs and PVs raised awareness of a relatively new viewing style.

Interest in FZs/PVs

Describe your interest in viewing at FZs and PVs (single response).



(n=304)

Bonus report: Enthusiasm for RWC 2019 spread beyond the stadiums

People who enjoyed watching rugby at pubs and bars

Pub/bar viewing was popular with younger generations

Many foreign nationals visited Japan from Europe and Oceania for RWC 2019. During the event, pubs and bars were busy virtually every day with spectators who already had a culture of viewing sports in pubs. According to the survey, an estimated 1.2 million visited pubs and bars. This viewing style, in which spectators of all nationalities come together to experience the thrills and excitement of rugby, while enjoying food and drinks offered a different kind of attraction and value than stadiums and FZ. This section contains profile data of RWC 2019 pub/bar spectators. It is based on Japan resident survey.



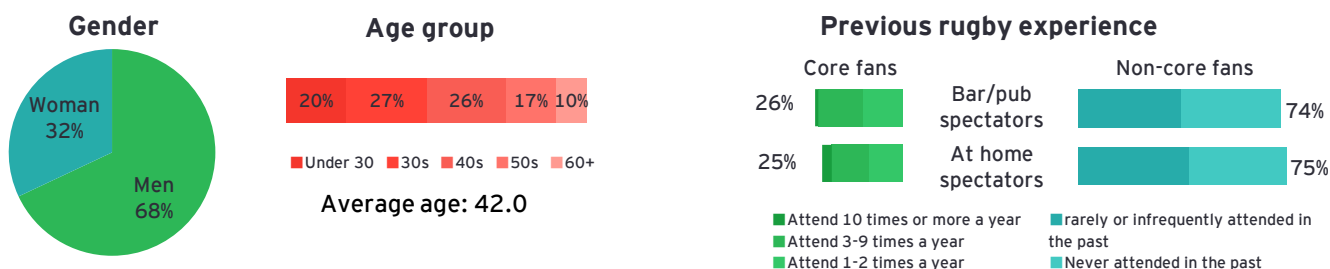
Estimated from survey data (n = 80,000)



OITA GODO NEWS COMPANY (3 October 2019)

Basic information on bar/pub spectators

The average age of people responding that they watched RWC 2019 at bars and pubs was 42, and younger people below 30 accounted for half. The ratio of core fans to non-core fans was roughly the same as for TV spectators at home, indicating that people with relatively little rugby experience enjoyed RWC 2019 at bars and pubs.



Bonus report: Enthusiasm for RWC 2019 spread beyond the stadiums

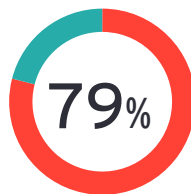
Viewing profiles

- ▶ Pub/bar spectator stayed an average 6.7 hours, and 79% were repeaters who watched two or more matches.
- ▶ "Friends" top the list of people accompanying spectators to bars and pubs, significantly outpacing other groups at 42%.

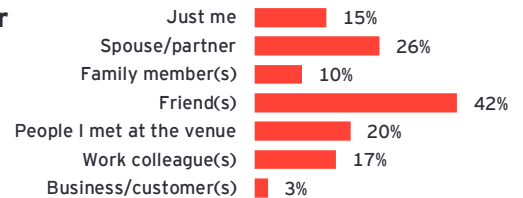
Total time in pub/bar*¹
6.7 hours

Total RWC 2019 hours watched*¹
8.7 hours

Percentage of people watching at least 2 matches at pub and bar



Accompanying spectators*²



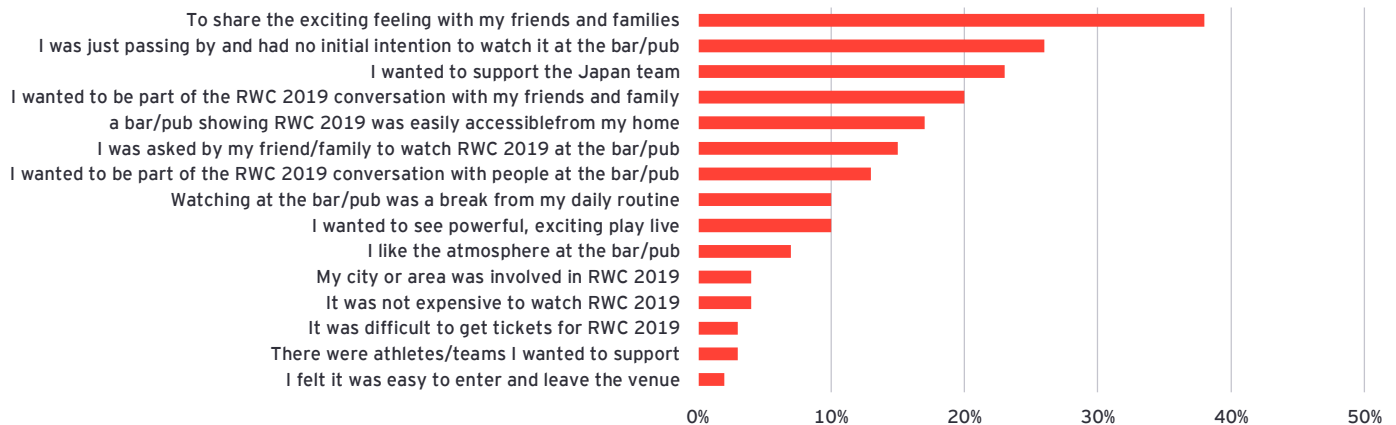
*1 Tournament period total
*2 People accompanying on pub/bar viewing (multiple response)

Viewing motivations and future intentions to watch rugby

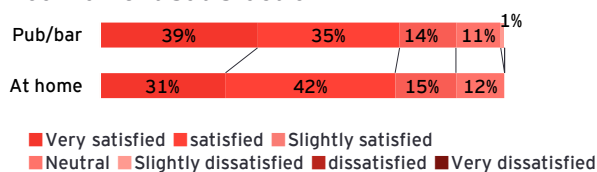
- ▶ The top reason for viewing matches at pubs and bars was "I want to share the exciting feeling with friends and families" at 40%. Pubs and bars presumably satisfied the desire to enjoy RWC 2019 with others.
- ▶ Nearly 20% of pub/bar spectators said they wanted to watch Top League matches even if they have to pay for them, and it can be inferred that a certain number of people developed a strong interest in rugby because pub/bar viewing.

Reasons for pub/bar viewing

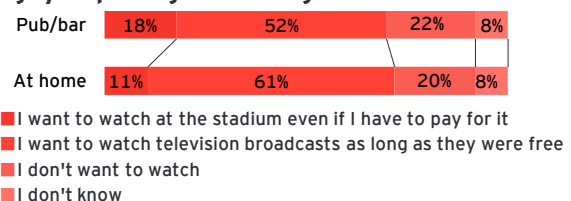
Survey question: Select the 5 most important reasons for viewing at pubs and bars.



Tournament satisfaction



Rugby Top League viewing intentions



RWC 2019 created opportunities for sports viewing at bars and pubs

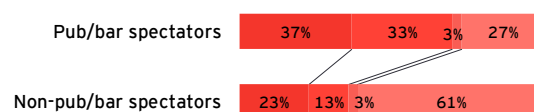
Pubs and bars provided an easy option for watching RWC 2019 to people who would have been satisfied enjoying the quadrennial rugby event at home but also had a desire to watch it with someone outside of home and share the excitement with others.

As can be seen from the "reasons for pub/bar viewing" graph, these viewing locations were an opportunity to share the excitement and functioned as a place to make connections with other people.

As can be seen from the "interest in bar/pub viewing" graph, RWC 2019 generated interest in future pub/bar viewing for 37% of those who went there. The tournament therefore provided people with a new form of viewing experience.

Interest in pub/bar

Describe your interest in pub/bar viewing (single response).



- I became interested in this place of viewing because of RWC 2019
- I was interested in this place of viewing prior to RWC 2019
- I lost interest in this place of viewing because of RWC 2019
- I didn't know about or am not interested in this place of viewing

(n=494)



04

What did inbound spectators do while in the country?

Survey analysis of RWC 2019 inbound spectators

1. RWC 2019 inbound spectators: Highlights and trends
2. RWC 2019 inbound spectators: Where they visited while in the country
3. RWC 2019 inbound spectators: tourist activities and satisfaction
4. RWC 2019 inbound spectators: behavior analysis
5. Summary: What did RWC 2019 inbound spectators do while in the country?



04

What did inbound spectators do while in the country?

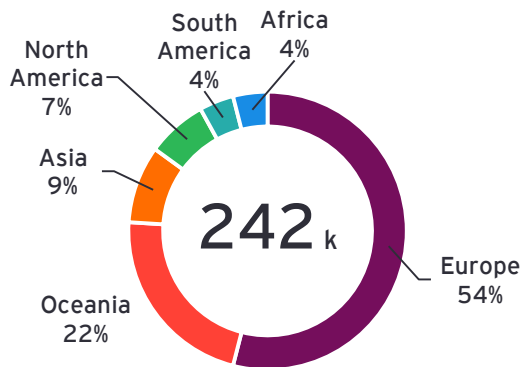
1. RWC 2019 inbound spectators: Highlights and trends

According to estimates in the economic impact analysis report, 242,000 inbound spectators visited Japan to attend RWC 2019, and stayed in Japan for an average of 17 days (16 nights), and consumed ¥686,117 (£4,574) each. Inbound spectators, clad in their national team's jersey, were an unusual sight on Japanese streets, and helped to underscore, in a very natural way, the extraordinary nature of the Rugby World Cup.

As described in Chapter 2 and Chapter 3, there was more to RWC 2019 than just the excitement of rugby viewing. Inbound spectators also provided a boost to tourism. The tournament lasted for a long 44 days, and foreign visitors used the time between matches to visit other parts of Japan, engaging in sightseeing and many other activities. This fusion of sports and tourism has come to be referred to as "sports tourism," and RWC 2019 provides an excellent example. Studying and analyzing where these people went, what activities they engaged in, whether they were satisfied or dissatisfied, and other aspects of the behavior and psychology of inbound spectators has significant implications for the expansion of inbound demand and the development of sports tourism.

This chapter draws a picture of the people visiting Japan for RWC 2019 based on the ticket purchasing data provided by the Organizing Committee and a survey of ticket purchasers (for non-Japan residents). *1

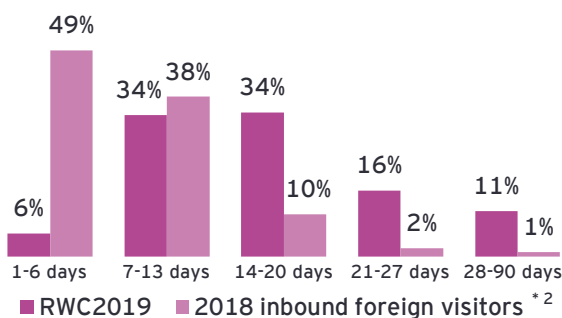
Total number of inbound spectators



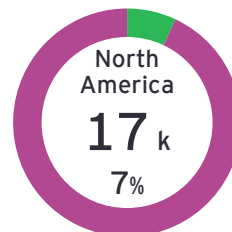
Consumption per person



Number of days inbound visitors stayed



Profile of inbound spectators for RWC 2019



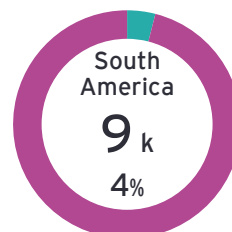
Average number of nights: 13.6 nights

Average number of matches attended: 2.9 matches

Percentage first-time visitors to Japan: 60%

Participating teams: USA, Canada

Satisfaction, intentions to visit again



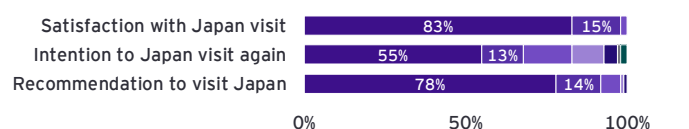
Average number of nights: 15.7 nights

Average number of matches attended: 3.4 matches

Percentage first-time visitors to Japan: 83%

Participating teams: Uruguay, Argentina

Satisfaction, intentions to visit again



n=5,391

* 1 The survey provides data on the ticket purchasers, not stadium spectators
 * 2 See Japan Tourism Agency, Consumption Trends Survey for Foreigners Visiting Japan (2018 data, tourism and leisure purposes)



Spectators from around the world

It was expected that RWC 2019 would mostly attract spectators from countries playing in the tournament, and the results do indeed show large percentages visiting from Europe and Oceania where many of the rugby powerhouse countries are located.*³ Japan was the only team from Asia in RWC 2019, but inbound spectators from Asia still accounted for 9% of the total.

* 3 Tabulated on the basis of place of residence rather than nationality

Satisfaction with Japan visit:

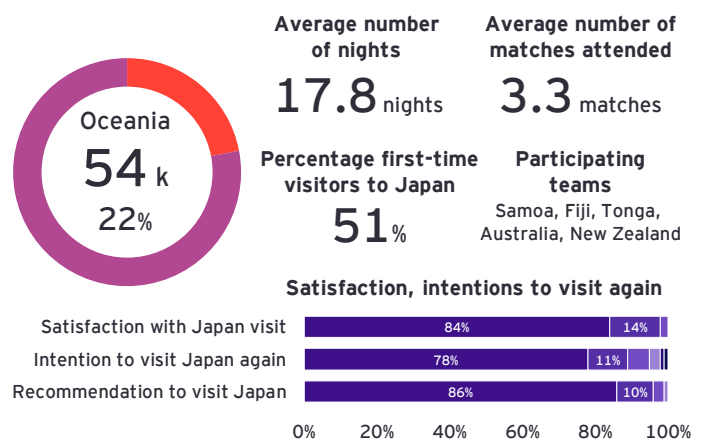
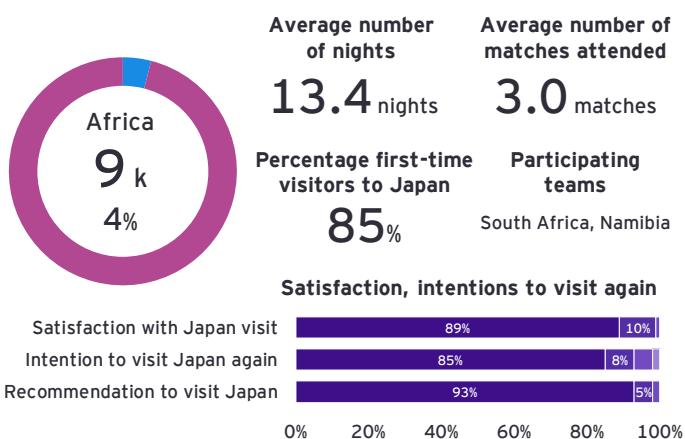
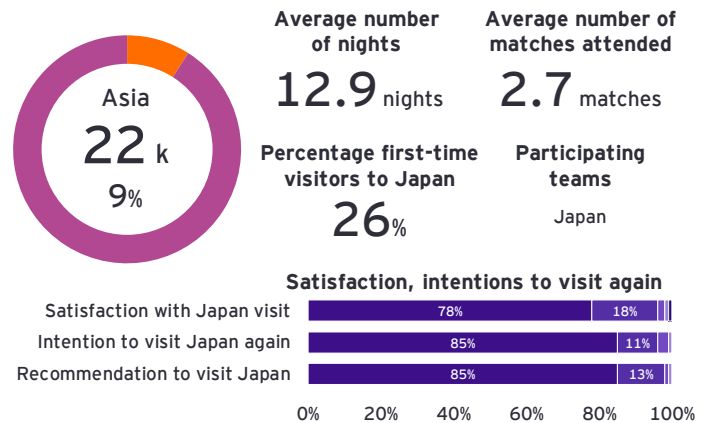
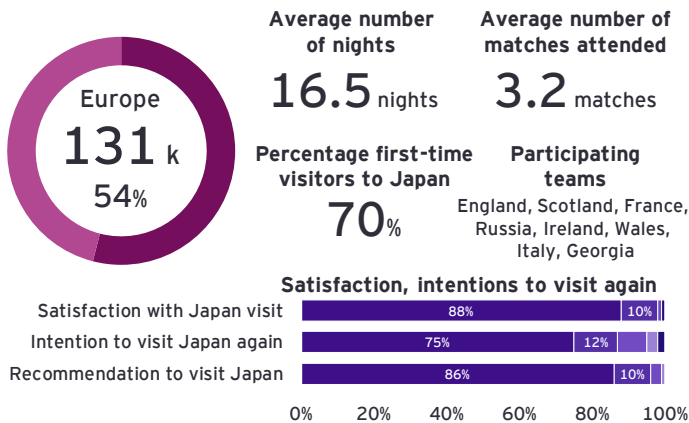
Very satisfied Satisfied Slightly satisfied Neutral Slightly dissatisfied Dissatisfied Very dissatisfied

Intentions to visit Japan again:

Absolutely want to come again Want to come again Somewhat want to come again Can't say Don't really want to come again Don't want to come again Will never come again

Recommendation of visit Japan:

Would absolutely recommend Would recommend Might recommend Can't say Might not recommend Wouldn't recommend Absolutely wouldn't recommend



04

What did inbound spectators do while in the country?

2. RWC 2019 inbound spectators: Where they visited while in the country

RWC 2019 was held in 12 cities around Japan, requiring inbound spectators to travel to different parts of the country depending on their teams' schedules. For example, inbound spectators attending all matches played by the Australia team would visit four prefectures from Hokkaido in the north to Kyushu in the south, a total straight-line distance of 2,800 km that crosses virtually all of Japan.

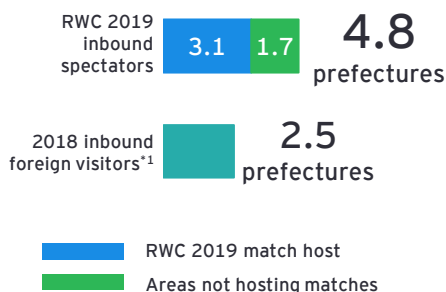
Model case
(following the Australia team's matches)

- ▶ 21 September: Sapporo (pool)
- ▶ 29 September: Tokyo (pool)
- ▶ 5 October: Oita (pool)
- ▶ 11 October: Shizuoka (pool)
- ▶ 19 October: Oita (quarterfinals)

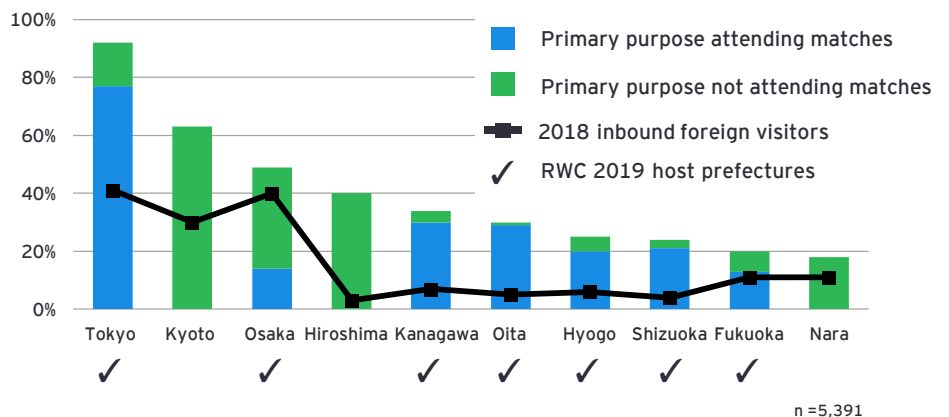


This is one example of the lines of movement for spectators following the schedule of Australia team matches, but widening the scope to inbound spectators as a whole, one can observe similar trends of visiting multiple areas, primarily in and around the match hosts. The "Average number of prefectures visited" graph shows that spectators coming to Japan for RWC 2019 visited on average 4.8 prefectures. This included an average of 1.7 prefectures where no matches were played, which indicates that inbound spectators went to other areas for purposes not related to the tournament. Among the "prefecture visit rate top 10" were Kyoto, Nara and Hiroshima, none of which hosted matches.

Average number of prefectures visited



Prefecture visit rates of RWC 2019 inbound spectators*2 TOP10

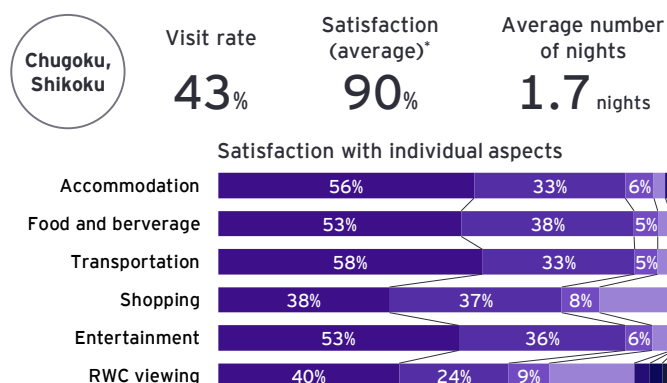
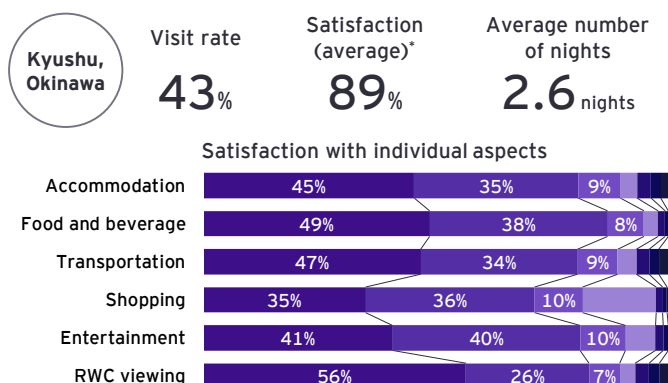
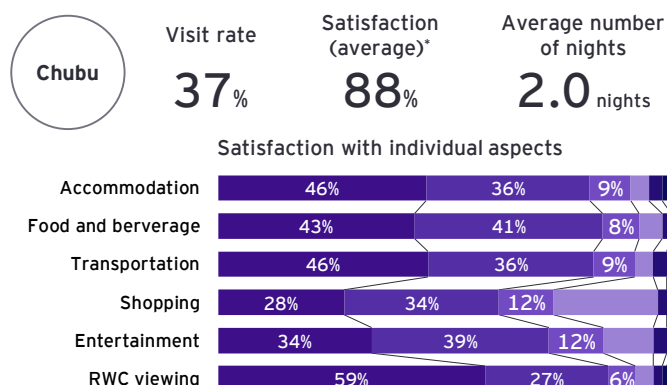
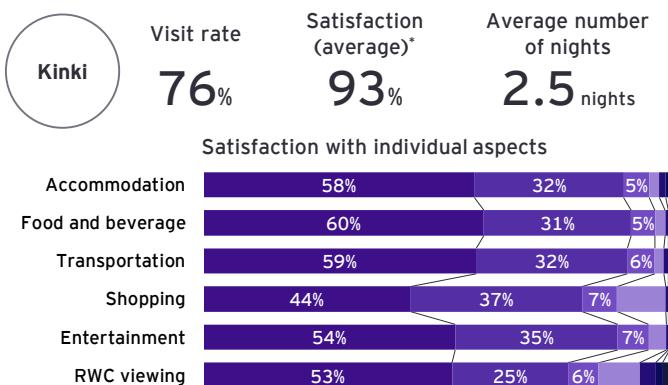
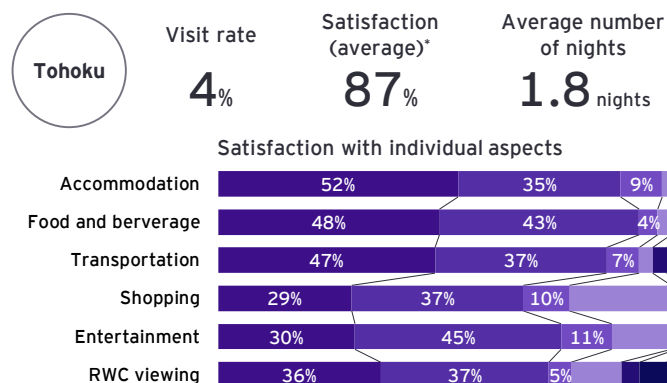
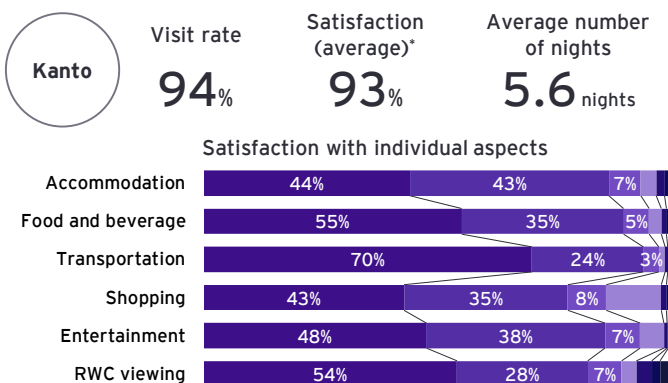
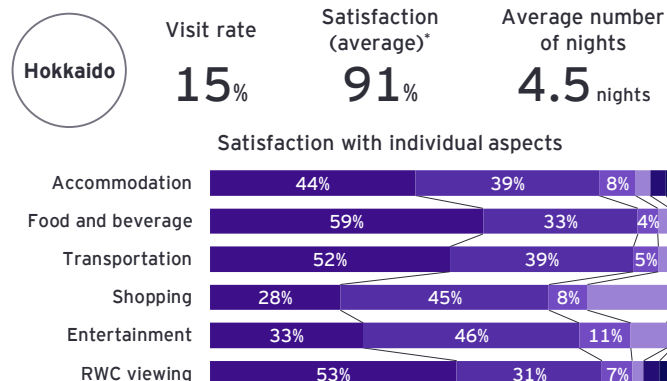


* 1 See Japan Tourism Agency, Consumption Trends Survey for Foreigners Visiting Japan (2018 data, tourism and leisure purposes)
 * 2 The visit rate is calculated as a percentage of survey respondents (n = 5,391) (multiple prefectures can be selected)

RWC 2019 regional visit rates, average numbers of nights and satisfaction *1

The survey asked inbound spectators about whether they visited prefectures and if they did, the number of nights stayed. It also contained questions about satisfaction with the accommodation, food and beverage, transportation, shopping, entertainment, and RWC viewing (if matches were attended) in the prefectures visited. There were differences in visit rates and numbers of nights due to the numbers of matches played, but satisfaction was generally high for all regions visited.

- Very satisfied
- Satisfied
- Slightly satisfied
- Ordinary
- Slightly dissatisfied
- Dissatisfied
- Very dissatisfied



* Percentage of people responding "very satisfied," "satisfied" or "somewhat satisfied" in a 7-level ranking of "very satisfied," "satisfied," "Slightly satisfied," "Neutral," "Slightly dissatisfied," "dissatisfied" and "very dissatisfied"

n=5,391

04

What did inbound spectators do while in the country?

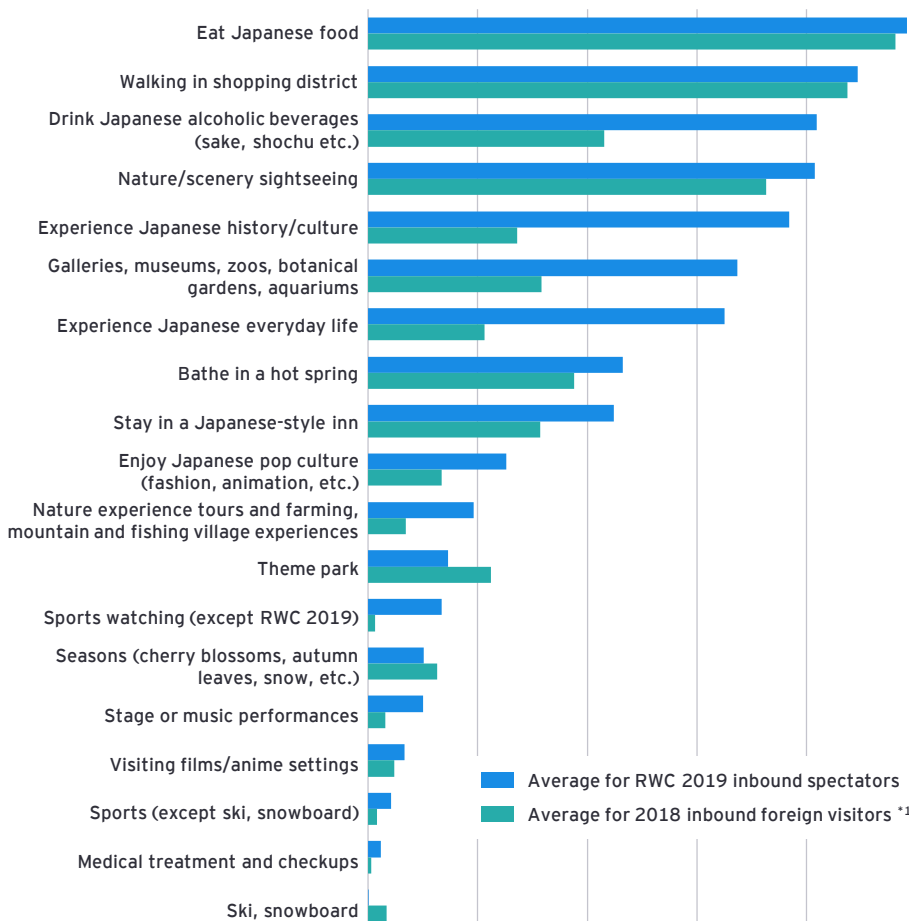
3. RWC 2019 inbound spectators: tourist activities and satisfaction

In addition to attending matches, what kinds of tourism did inbound spectators engage in while in the country? The Japan Tourism Agency conducts a survey of activities by inbound foreign visitors while in Japan, and the same questions were asked of RWC 2019 inbound spectators. This section compares RWC 2019 inbound spectators to ordinary inbound foreign visitors to identify activity rates and satisfaction.



Activities of inbound spectators

Survey question: What among the following activities did you carry out during this trip? (Multiple response)



The activities of RWC 2019 inbound spectators while in Japan exhibited different trends from ordinary inbound tourists.

More people than normal experienced activities like "drink Japanese alcoholic beverages," "experience Japanese history and culture" and "Experience Japanese everyday life," but fewer visited theme parks.



*1 See Japan Tourism Agency, Consumption Trends Survey for Foreigners Visiting Japan (2018 data, tourism and leisure purposes)

n=5,391

04

What did inbound spectators do while in the country?

4. RWC 2019 inbound spectators: behavior analysis

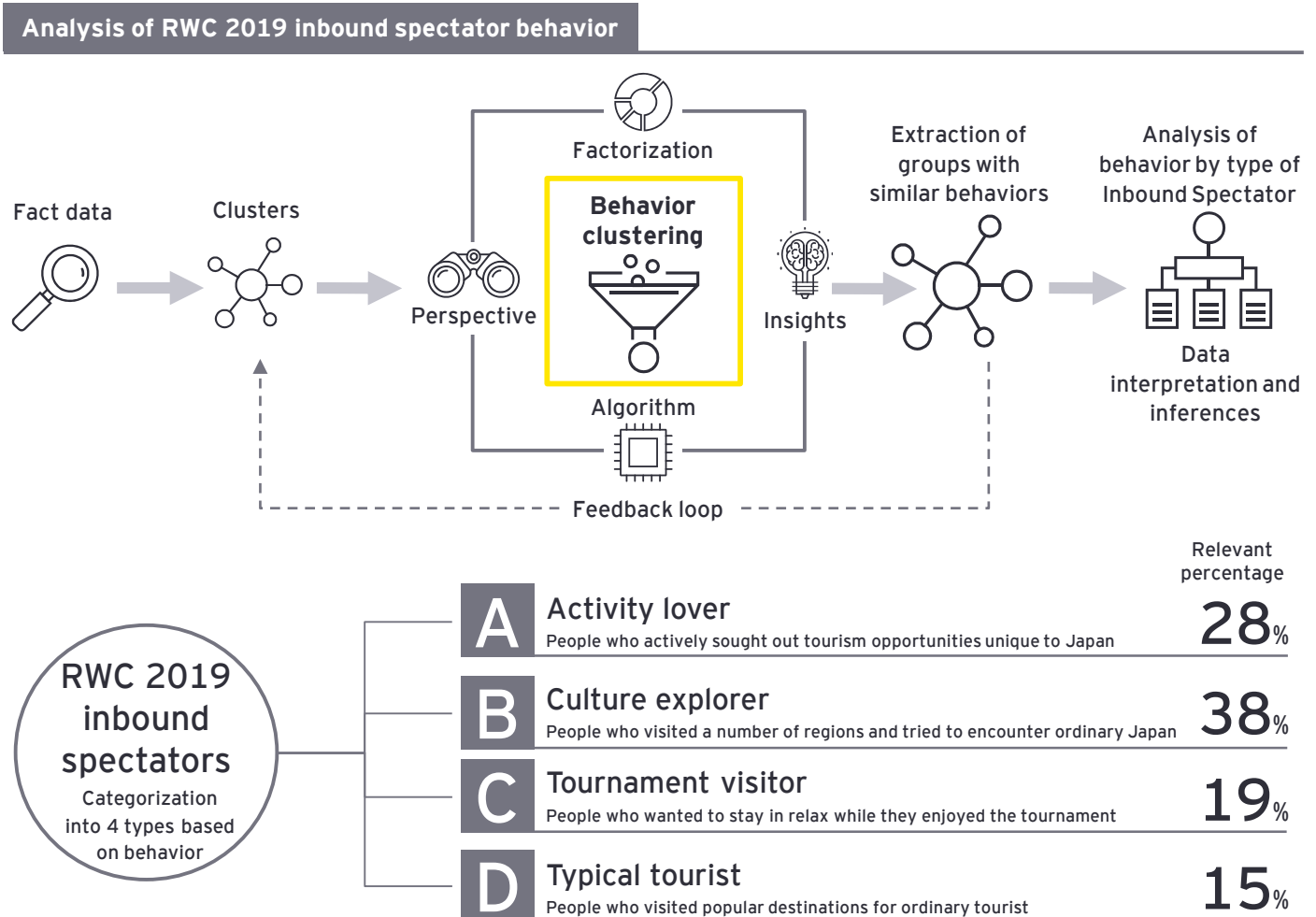
To this point, this chapter has examined the profiles and activities of inbound spectators for RWC 2019, focusing on the following perspectives.

- ▶ How many people visited Japan from different parts of the world to attend RWC 2019 and how long were they estimated to stay in Japan?
- ▶ What kinds of regions did inbound spectators visit and stay in, and where they satisfied with accommodations and food?
- ▶ What kinds of activities did inbound spectators engage in between matches, and what was their level of satisfaction?

Tournament data, including data from surveys, was tabulated from a number of different angles, including place of residence and places visited. Inbound spectators for RWC 2019 were compared against ordinary inbound visitors, and spectators from different regions were compared against each other to draw a picture of inbound spectators and identify specific attributes and trends.

For the remainder of this chapter, we use statistical approaches to draw a clearer picture of spectators, seeking an answer to the question at the heart of the chapter, "What did inbound spectators do while in the country?", and also hints that can be used to further expand inbound demand and develop sports tourism. This group contains a mixture of different characteristics, and by gathering similar characteristics together into a number of types, we can begin to efficiently draw a picture of these people and obtain insights into useful measures for them going forward. For the purposes of this report, we placed inbound spectators into four categories according to their activities and other variables based on survey data and ticket purchaser data.

Inbound spectators were categorized into Types A-D as shown below based on data similarities without arbitrariness. However, the interpretation of the data, including the naming, does involve inference. In the following pages, we discuss the distinguishing features of the four types, explore their awareness and psychology, and evaluate satisfaction in light of their preferences and behavior patterns.



A

Activity lover

People who actively sought out tourism opportunities unique to Japan

Characteristics of this type

This group accounted for 38% inbound spectators for RWC 2019 engaged in numerous tourist activities that were unique to Japan like "drinking sake", "bathing in hot springs" and "enjoying Japanese history and culture". All of the inbound spectators included in this type responded that they had "stayed at a Japanese-style inn" as part of their accommodations.

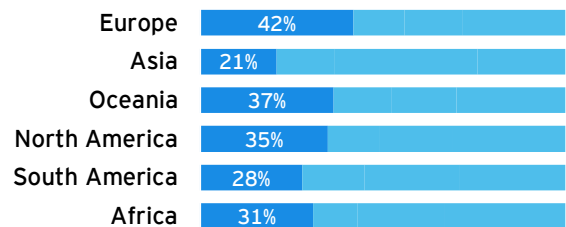
This group visited 5.9 prefectures, of which 2.3 were not host cities, indicating that they traveled broadly beyond rugby venues and actively enjoyed tourism opportunities. Both days in Japan and consumption were significantly above average, indicating a trend not to stint on spending for value.

This category was also the most satisfied with Japan and the most likely to recommend it as a destination, and it is expected that they will communicate positive experiences upon returning home.

Relevant percentage

38%

Percentage by place of residence



Average number of nights

18.5 nights

Average number of matches attended

3.3 matches

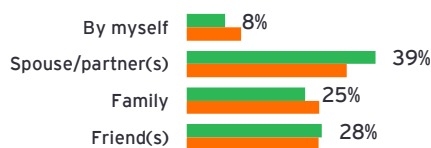
Number of prefectures visited (of which, outside host cities)

5.9
(2.3)

Average consumption per person

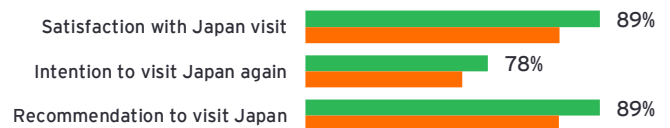
¥775k
(£5,172)

Accompanying people

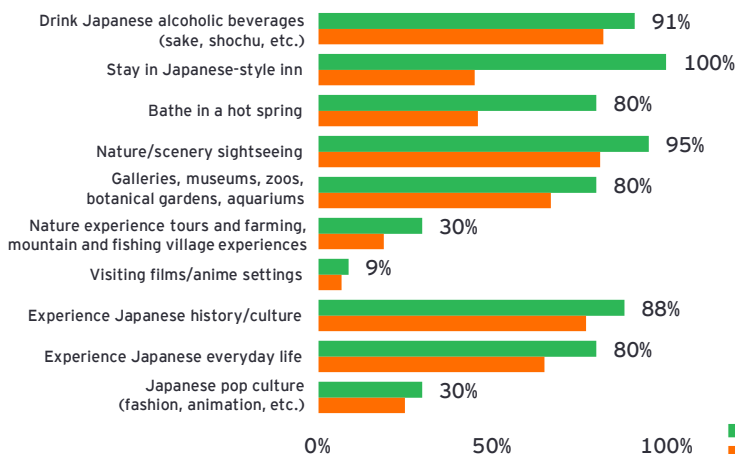


Satisfaction and future intentions

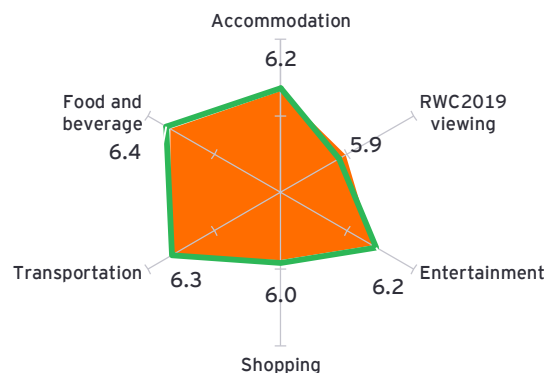
(percentage of respondents giving the highest marks in a 7-level grading system)



Activities while in Japan



Satisfaction with activities



■ Activity lover
■ Inbound spectator average

n=5,391

B

Culture explorer

People who visited a number of regions and tried to encounter ordinary Japan

Characteristics of this type

This group accounted for 28% of the inbound spectators for RWC 2019, and they spent their time encountering Japan's ordinary life, history, culture and nature with activities like "experience everyday life in Japan", "encounter Japanese history and culture" and "nature/scenery sightseeing". One distinguishing characteristic is that there were zero in this group who stayed at Japanese-style inn, preferring instead to stay at hotels and private residences.

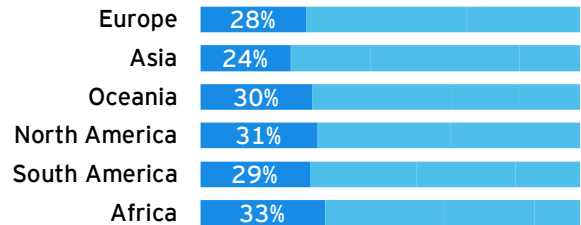
This group was second only to the Activity lover group in terms of number of prefectures visited and was willing to travel outside of host cities.

This category was the highest for intentions to visit Japan again, with 79% responding "absolutely want to come again". Satisfaction with individual consumption activities (accommodation, Food and beverage, transportation etc.) was also generally higher than other categories, indicating that for spectators who wanted to experience ordinary Japanese life, this trip was both full and satisfying.

Relevant percentage

28%

Percentage by place of residence



Average number of nights

15.6 nights

Average number of matches attended

3.1 matches

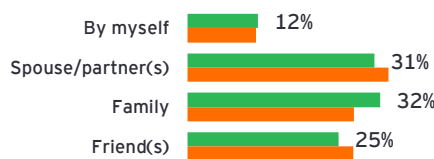
Number of prefectures visited (of which, outside host cities)

4.7
(1.6)

Average consumption per person

¥683k
(£4,560)

Accompanying people

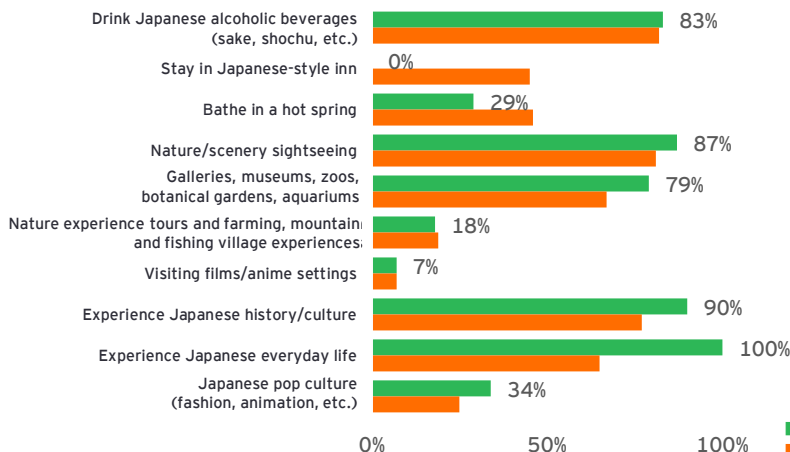


Satisfaction and future intentions

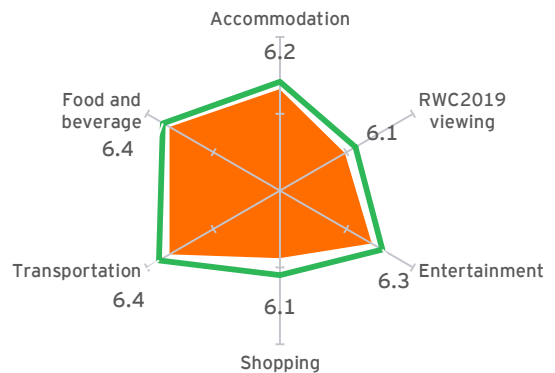
(percentage of respondents giving the highest marks in a 7-level grading system)



Activities while in Japan



Satisfaction with activities



n=5,391



Tournament visitor

People who wanted to stay in relax while they enjoyed the tournament

Characteristics of this type

This group accounted for 19% of inbound spectators for RWC 2019 and was characterized by generally few activities, preferring to spend time relaxing when not at rugby matches. This was a particularly common category for people visiting Japan from other parts of Asia, and it was also distinguished by a relatively large number traveling alone.

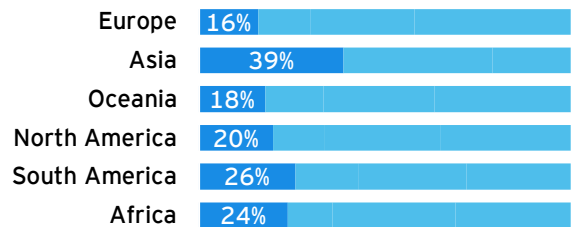
The average length of stay was relatively short at 13.2 nights, and stays are assumed to have been primarily in host cities.

Both satisfaction and future intentions were lower than other categories, and satisfaction with individual activities like shopping and entertainment was also below average. If the low satisfaction is taken to mean high expectations, then it can be assumed that the shopping and entertainment were not as good as expected.

Relevant percentage

19%

Percentage by place of residence



Average number of nights

13.2

 nights

Average number of matches attended

2.7

 matches

Number of prefectures visited (of which, outside host cities)

3.4

(0.9)

Average consumption per person

¥570k

(£3,806)

Accompanying people

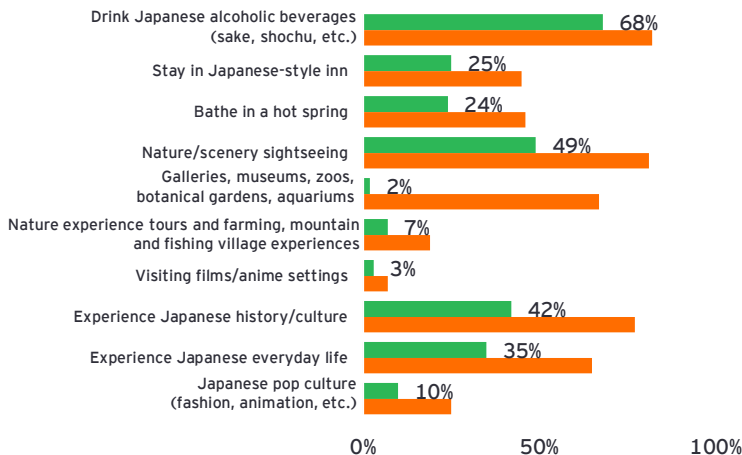


Satisfaction and future intentions

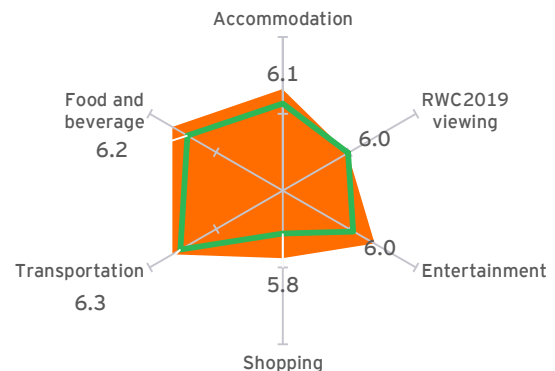
(percentage of respondents giving the highest marks in a 7-level grading system)



Activities while in Japan



Satisfaction with activities



■ Tournament visitor
■ Inbound spectator average

n=5,391



Typical tourist

People who visited popular destinations for ordinary tourist

Characteristics of this type

This group accounted for 15% of inbound spectators for RWC 2019 and consisted of people who focused their tourism on popular destinations for foreign travelers and famous sights, for example, "galleries, museums, zoos, botanical gardens, aquariums" and "nature, scenery, sightseeing". One characteristic of this category is that there were zero people opting to "experience everyday life in Japan" and there was no particular emphasis among them on "experiencing Japan". Rather, they are presumed to have simply identified enjoyable destinations to which to travel.

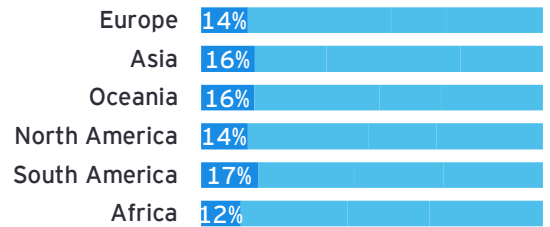
There were no significant differences from the average inbound spectator in terms of number of nights, number of matches or spectating behavior, but delving into more detailed data indicates that spending on accommodation was several percentage points higher than average.

In terms of satisfaction for individual items, this category was less satisfied than average, the exceptions being RWC 2019 viewing and transportation. This is interpreted as many of the inbound visitors in this group having high expectations for accommodations, Food and beverage, shopping and entertainment, and therefore being less satisfied than average.

Relevant percentage

15%

Percentage by place of residence



Average number of nights

14.6

 nights

Average number of matches attended

3.0

 matches

Number of prefectures visited (of which, outside host cities)

4.2

(1.4)

Average consumption per person

¥611k

(£4,076)

Accompanying people

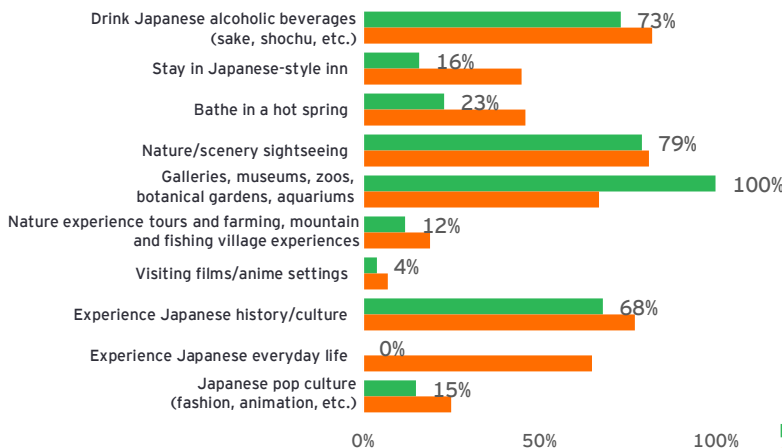


Satisfaction and future intentions

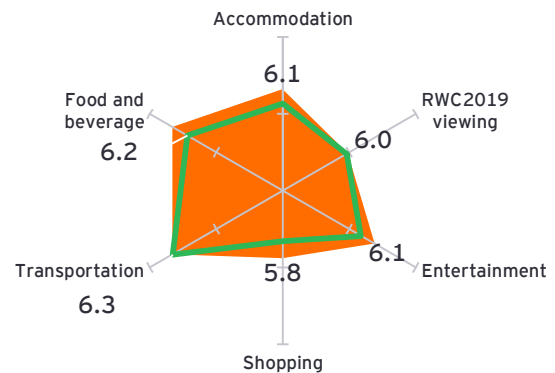
(percentage of respondents giving the highest marks in a 7-level grading system)



Activities while in Japan



Satisfaction with activities



n=5,391

What did inbound spectators do while in the country?

5. Summary: What did RWC 2019 inbound spectators do while in the country?

The focus of this chapter was, "How were the inbound spectators for RWC 2019 different from ordinary inbound foreign travelers?" It used ticket purchaser data and survey findings to analyze the distinguishing features of inbound spectators for the tournament and their activities while in Japan. Among the features distinguishing inbound spectators were the many who visited from Europe and Oceania, areas from which Japan ordinarily receives relatively few visitors. Many among them were visiting Japan for the first time because of RWC 2019. In addition, many inbound spectators traveled long distances around Japan following the matches of their national teams, which resulted in a trend towards longer stays. While in Japan, they visited multiple prefectures, enjoyed Japanese cuisine and sake, and encountered Japanese culture. They also engaged in many activities, including tourism and shopping. While there were slight differences in satisfaction depending on the type of activity, most of the visitors seem to have had good impressions of their experiences in Japan.

The latter half of this chapter focused on the behavior and psychology of spectators using data similarity to identify four types of behavior patterns and inbound spectator categories. These categories provided insights into the theme of this chapter, "What did RWC 2019 spectators do?". Spectators have different preferences, and these appear to have led to differences in activities and satisfaction while in Japan.

Insight from behavior analysis

- ▶ Among inbound spectators for RWC 2019, 38% actively participated in a variety of activities while in Japan, and overall, the more activities done, the more likely the inbound visitor was to be satisfied and willing to recommend Japan to others. Activities increased opportunities to communicate with Japanese people, which presumably increased their understanding of and familiarity with Japan.
- ▶ Among inbound spectators for RWC 2019, 28% came expecting to experience ordinary life in Japan, and on the whole, they were satisfied with the basic elements of staying in Japan: accommodation, food and beverage, transportation, shopping and entertainment. They also showed higher intentions to visit Japan again. RWC 2019 seems to have been a good fit with people wanting to enjoy "the real Japan".
- ▶ Among inbound spectators for RWC 2019, 19% wanted to relax during their time in Japan. They are characterized by generally fewer activities and relatively low degrees of satisfaction. People looking for relaxed stays presumably emphasized more day-to-day elements like shopping than tourist activities.
- ▶ Among inbound spectators for RWC 2019, 15% emphasized sightseeing, museums and other popular tourist destinations. As a whole, they were satisfied with the rugby viewing and transportation, but reported relatively low satisfaction with shopping, accommodation and food. The indication from this experience is that it may be better to emphasize tourism for people who are coming to Japan without any strong awareness of the country.

Japan is scheduled to host a large number of global sports events going forward, which will increase the opportunities for "sports tourism", a style of tourism that combines matches with sightseeing. It should also be emphasized that further measures are needed so that the inbound boom brought by RWC 2019 becomes permanent rather than ending as a transit phenomenon. For this to happen, it will be important to first understand the preferences and expectations of inbound visitors, increase the attraction and value of tourism in Japan, and communicate the appeal broadly.





05

How was the decision made to cancel matches during the typhoon?

Results and experiences: Crisis response lessons for future global sports events

1. Overview of RWC 2019 operational plans and response plans in the event of typhoon approach or strike
2. Response plans and realities at each phase
3. Summary: Evaluation of RWC 2019 typhoon response and lessons learned



05

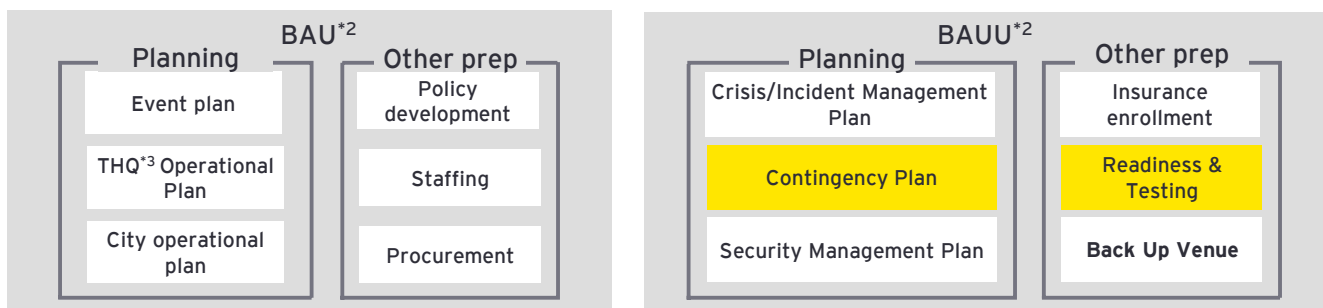
How was the decision made to cancel matches during the typhoon?

1. Overview of RWC 2019 operational plans and response plans in the event of typhoon approach or strike

Typhoon No. 19 (Hagibis), which occurred during RWC 2019, produced record-breaking rains and winds and brought enormous damage to a large swath of Japan, disrupting Japanese society in general, including the many foreign nationals that had traveled to the country for the tournament. Japan frequently experiences direct strikes by typhoons, and it was known during the planning for this tournament that there would need to be sufficient responses and preparations in place in the event of typhoon approach or strike.

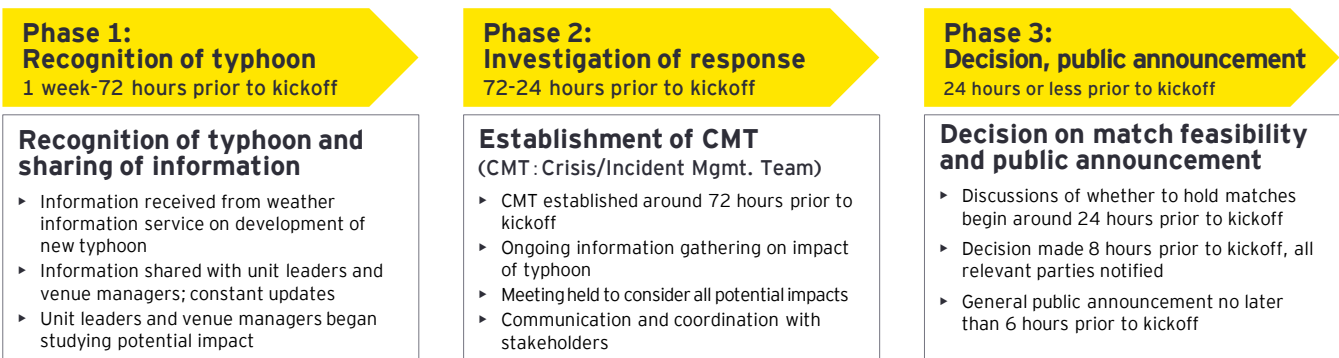
Beginning about a year out, the RWC 2019 Organizing Committee, responsible for event administration, ("Organizing Committee" below) ran numerous simulations, formulated a detailed Contingency Plan, and shared it with everyone involved. Nonetheless, the process of deciding to cancel matches for the first time in Rugby World Cup history required the consideration of responses that have not been anticipated in the original plan, and this proved to be difficult within the limited time available. This chapter reviews the process of responding to Typhoon No. 19 and presents the lessons learned from this experience. It is based on interviews with members of the Organizing Committee and operational documents in the possession of the Organizing Committee.

RWC 2019 tournament operations*1



*2 BAU stands for "business as usual" and refers to ordinary operations; "BAUU" stands for business as unusual and refers to crisis/incident response.
 *3 THQ: Tournament Head Quarter

Outline: Contingency Plan in the Event of Typhoon Approach or Strike*1



Contingency Plan

The Organizing Committee formulated three types of plan according to a hierarchy of BAUU response. The "Crisis/Incident Management Plan" presented basic "risk" concepts and decision-making frameworks for each level of the risk. The "Contingency Plan" provided responses and processes for different types of risk. The "Security Management Plan" contained means to evacuate venues and ensure safety.

The "Contingency Plan" selected typhoon, earthquake, terrorism and other events considered to have high-frequency and the potential to do large damage, and provided specific, concrete responses for each of the risks. The Organizing Committee emphasized typhoon in particular because "the timing of the tournament coincided with typhoon season," "Typhoons No. 21 and No. 24 occurred during the same period the previous year and inflicted significant damage on Japan," and "impact would be extremely large if a typhoon were to strike." It therefore prepared a detailed "Contingency Plan in the Event of Typhoon Approach or Strike" that organized response into three phases.

*1 Excerpted from the RWC 2019 Organizing Committee document "Overview of RWC 2019 Crisis/Incident Management Plan"

Readiness & Testing

Planning is a necessary condition, but not a sufficient condition, in crisis response. Effectiveness must be ensured by running tests ahead of time to verify that plans can be executed when an event occurs and validate the outcomes.

The Organizing Committee provided a "Readiness & Testing" period between the fall of 2018 and the start of the tournament in 2019 as a time to put the finishing touches on preparations and validate both BAU and BAUU operations.

Validations examined concrete situations, posing scenarios like "a typhoon strikes during a match between Japan and Scotland to determine if the Japan team will continue on to the finals tournament," and brought everyone involved together for real-life discussions about the kinds of response that would be required in different circumstances and who would make decisions when. Typhoon No. 19 did indeed strike just as the scenario posited, and the process of validating operations proved to be a great aid in actual response. However, response was not necessarily implemented exactly as envisioned, and the real-life experience taught numerous lessons.

2. Response plans and realities at each phase

Phase 1
5 October-6 October

Recognition of typhoon
Response and lessons learned

Typhoon No. 19 was first recognized during the regular morning meeting on 5 October. At that point in time, it was impossible to accurately predict the typhoon's path, but the potential to impact multiple matches at the end of the pool stage was recognized and initial response began.

Plan

Actual

Lessons Learned

4-8 October

5 October

Timely and comprehensive information gathering network

Recognition of typhoon
Swift provision of information from the weather information service when a potential typhoon is recognized

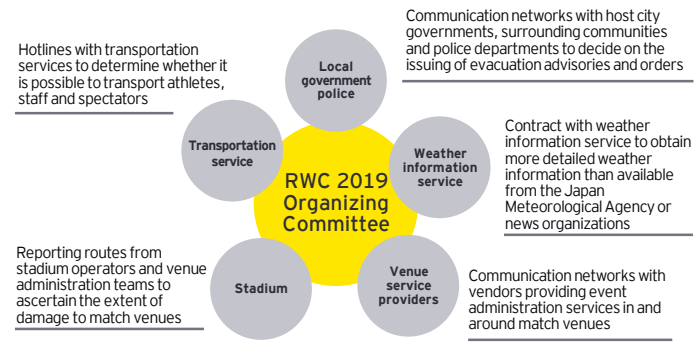
- ▶ Recognition of a tropical depression to the southeastern offshore of Japan based on information provided by the weather information service
- ▶ The Organizing Committee shared information that a tropical depression was forecast to develop into a typhoon and approach Japan during the 11-14 October period, potentially impacting the final matches of the pool stage

One of the most basic components of crisis response is the timely gathering and sharing of information. For RWC 2019, networks were in place with transportation services and host city governments so that the organizers were able to obtain the information they required when they required it. For typhoon response in particular, a contract was signed with a weather information service to gain early access to weather information and expert advice on potential paths and impacts. One comment that came out of interviews with members of the Organizing Committee was, "We had an information network in place in advance and were able to avoid a situation in which we lacked the information necessary to make decisions," underscoring the essential and important role of the information gathering framework.

Information sharing and updates
The Organizing Committee was notified of the typhoon forecast and potential impact. Up-to-date information was shared from that time

6 October

Information gathering framework when typhoon approach/strike forecast



Impact study
Unit leaders and venue managers began studying the potential impacts on matches and venues

- ▶ Sharing of the development of the tropical depression into Typhoon No. 19
- ▶ It became more likely that the typhoon would approach Kyushu and Okinawa around 12-13 October (at this point in time, an accurate path could not be predicted)

Testing the Contingency Plan with 2 typhoons

Right before the start of tournament, Typhoon No. 15 struck on the Japanese islands, and during the event, Typhoon No. 18 approached. The Organizing Committee was able to use its experiences dealing with these two typhoons in its response to Typhoon No. 19.

Typhoon No. 15 caused large-scale power outages, mostly in the Kanto region, and taught the importance of providing information about typhoons, particularly to foreign nationals may have little experience with them, and the potential for typhoons to impact event administration even if they do not strike on the day of a match. In responding to Typhoon No. 18, the organizers experienced a situation that required them to study "backup venues for matches," something not contained in the initial plan. Nonetheless, the Organizing Committee found that they were required to make maximum effort to hold the matches. Realistic testing is extremely difficult for contingency plans, and these were extraordinarily useful lessons that could not be learned from theory alone.

*Excerpted from the RWC 2019 Organizing Committee document "Typhoon Contingency Plan"
*Excerpted from the RWC 2019 Organizing Committee document "Lessons Learned from Typhoon No. 19 Crisis Response"

2. Response plans and realities at each phase

Phase 2

7 October-8 October

Investigation of responses

Response and lessons learned

On 8 October, when more precise forecasts of the typhoon's path were available and it was almost certain that it would strike Japan, the Organizing Committee established a cross-functional Crisis/Incident Management Team (CMT). The team was tasked with gathering information on how the typhoon would impact tournament and with coordinating with participating teams, host city governments and other stakeholders.

Plan

Actual

Lessons learned

8-10 October

Information gathering and investigation meetings

Meetings were held to gather necessary information and investigate potential impacts

Communication and coordination with stakeholders

The organizers began communications and coordination with Rugby World Cup Limited ("RWCL" below) and host cities

Establishment of CMT

The CMT was established around 72 hours prior to kickoff for potentially impacted matches, and a statement was issued that the tournament had moved to a "BAUU" stance

7 October

- ▶ The potential impact on four matches scheduled for 12-13 October began to be studied with typhoon's path prediction information at this point in time.
 - ▶ New Zealand v Italy (Toyota)
 - ▶ Ireland v Samoa (Fukuoka)
 - ▶ USA v Tonga (Hanazono)
 - ▶ Wales v Uruguay (Kumamoto)
- ▶ RWCL and the Organizing Committee studied backup venues for Kyushu matches
- ▶ The Organizing Committee visited Tokyo and Saitama and approached them about possible use of Tokyo Stadium and Kumagaya Rugby Stadium as backups

8 October

- ▶ The CMT was established ahead of plan and a statement issued inside and outside of the organization that it had transitioned to "BAUU"
- ▶ Impacted matches were reconsidered as the typhoon changed course
 - ▶ Australia v Georgia (Shizuoka)
 - ▶ New Zealand v Italy (Toyota)
 - ▶ England v France (Yokohama)
 - ▶ USA v Tonga (Hanazono)
 - ▶ Namibia v Canada (Kamaishi)
 - ▶ Japan v Scotland (Yokohama)
- ▶ Adjustments were made to hold the 12 October Ireland v Samoa match (Fukuoka) and 13 October Wales v Uruguay match (Kumamoto) as planned

Establishment of CMT and publication of statement

The Contingency Plan in the Event of Typhoon stipulated, "If, 72 hours prior to the kickoff of a match, there is a high probability of a typhoon striking near the venue, a CMT (equivalent to a "Disaster Response Headquarters" at an ordinary company) will be established and notifications issued by the tournament operations headquarters to relevant parties inside and outside the organization." The reason for using 72 hours prior to kickoff as the standard for establishing a CMT is because this is when weather forecasts become precise enough that a typhoon's path can be predicted with certainty. In this tournament, the CMT was established 96 hours prior to kickoff, ahead of plan because Typhoon No. 19 was extremely strong and highly likely to have significant impact on general event administration, and at this point in time a statement was issued to relevant parties inside and outside the organization that it had moved to a BAUU stance. It is important to make a timely decision on the transition from "BAU" to "BAUU" and to share the decision throughout the organization so that it is able to work as one to respond to a crisis like a typhoon. For this tournament, the entire organization was able to align its perceptions because guidelines on when to move to "BAUU" and the specific trigger event (the issuing of a "CMT Establishment Statement") had been defined in advance.

Additional investigation of options and control of load

During typhoon response, it is crucial to go beyond just the sponsor (RWCL) and major stakeholders (host city governments), and also listen to what other stakeholders like the media, teams and national rugby associations are saying. These stakeholders made numerous requests, raising the need to investigate options that were not in the original plan: "postponement of matches," "change of venues" and "spectator-less matches."

Investigating and making arrangements for additional options places load on the working-level staff. An attitude of flexibility and a willingness to entertain additional options is helpful in securing the understanding and cooperation of stakeholders, but it is also important to manage the workload within the scope of the organization's resources.

*Excerpted from the RWC 2019 Organizing Committee document "Typhoon Contingency Plan"

*Excerpted from the RWC 2019 Organizing Committee document "Lessons Learned from Typhoon No. 19 Crisis Response"

Phase 3
9 October-13 October

Decision, public announcement Response and lessons learned

The Organizing Committee and RWCL investigated all possibilities right up until the final moment to enable matches to go forward. With the typhoon maintaining its strength, the organizers considered backup venues and postponements, options that had not been in the original plan, but ultimately decided that safety was paramount and therefore canceled three matches.

Plan

Actual

| 10-12 October | 9 October | 10 October | 15:00 |
|---|---|--|---|
| <p>Discussions about holding matches</p> <p>Discussions began with a target of determining whether matches can be played by 24 hours prior to kickoff.</p> | <p>9:00</p> <ul style="list-style-type: none"> Discussion of postponing the 12 October New Zealand v Italy match Discussion of holding the 13 October Japan v Scotland match without spectators or postponing to the next day | <p>10:30</p> <ul style="list-style-type: none"> The people responsible in RWCL and the Organizing Committee held discussions and made a final decision to cancel those two matches on 12 October | <ul style="list-style-type: none"> Consultation between RWCL and the Organizing Committee. Discussion of the timing and content of the announcement should the Kamaishi match be canceled |
| <p>11-13 October</p> <p>Decision on whether to play matches and notification to relevant parties</p> <p>Notification of decisions on whether to play matches were made to relevant parties with a target of 8 hours prior to kickoff.</p> | <p>10:00</p> <ul style="list-style-type: none"> Adjustments began to postpone New Zealand v Italy to the next day | <p>12:00</p> <ul style="list-style-type: none"> At the press conference, it was announced that New Zealand v Italy (Toyota) and England v France (Yokohama), both scheduled for 12 October, were canceled | <p>20:30</p> <ul style="list-style-type: none"> Publication on the official website of the status of the Kamaishi match. This was accompanied by reminders to spectators to stay safe |
| <p>Public announcement of whether matches will be played</p> <p>General public announcement was made no later than 6 hours prior to kickoff.</p> | <p>16:00</p> <ul style="list-style-type: none"> Discussions of using Oita as a backup venue for England v France Potential to postpone Namibia v Canada investigated, but difficulties encountered in transportation and security staffing | <p>16:00</p> <ul style="list-style-type: none"> The intention to hold the Australia v Georgia match (Shizuoka) the next day as planned was also confirmed. Preparations were made to provide assistance to the stranded because of the potential for transportation services to suspend operations | <p>19:45</p> <ul style="list-style-type: none"> Ireland v Samoa match (Fukuoka) played as planned |
| | <p>19:00</p> <ul style="list-style-type: none"> Discussions of using Oita as a backup venue for England v France Potential to postpone Namibia v Canada investigated, but difficulties encountered in transportation and security staffing | <p>19:15</p> <ul style="list-style-type: none"> Australia v Georgia (Shizuoka) played. Assistance provided to the stranded because of disruptions to transportation services | <p>13 October</p> |
| | | <p>12 October</p> | <p>5:00</p> <ul style="list-style-type: none"> Conference call with the Kamaishi Stadium manager to confirm the status of damage on the ground |
| | | <p>9:00</p> <ul style="list-style-type: none"> Discussions between RWCL and the Organizing Committee of the feasibility of playing Namibia v Canada (Kamaishi) the next day | <p>5:50</p> <ul style="list-style-type: none"> Announcement of the cancellation of Namibia v Canada (Kamaishi) |
| | | <p>10:00</p> <ul style="list-style-type: none"> Meeting with the Kamaishi venue manager | <p>7:00</p> <ul style="list-style-type: none"> Sharing of the situation on the ground in Hanazono, Kumamoto and Yokohama, confirmation of the restoration of transportation services |
| | | <p>13:30</p> <ul style="list-style-type: none"> Written opinions received from the Governor of Iwate and Mayor of Kamaishi seeking early announcement of the cancellation of the match for reasons of public safety | <p>7:15</p> <ul style="list-style-type: none"> Announcement that USA v Tonga (Hanazono) and Wales v Uruguay (Kumamoto) would be played |
| | | | <p>8:00</p> <ul style="list-style-type: none"> Coordination to enable Japan v Scotland (Yokohama) to be played as planned. Finalization of policy allowing the spectators to bring in their own beverages |
| | | | <p>10:45</p> <ul style="list-style-type: none"> Announcement that Japan v Scotland (Yokohama) would be played and spectators were allowed to bring in beverages |

*Excerpted from the RWC 2019 Organizing Committee document "Typhoon Contingency Plan"

*Excerpted from the RWC 2019 Organizing Committee document "Lessons Learned from Typhoon No. 19 Crisis Response"

05

How was the decision made to cancel matches during the typhoon?

2. Response plans and realities at each phase

Phase 3
9 October-13 October

Decision, public announcement Response and lessons learned

Lessons learned

Clear definition of the final decision-maker

The decision on whether or not to play a match carries with it the weight of all of the expectations of the athletes, fans around the world and everyone else involved. Before the tournament ever began, RWCL and the Organizing Committee clearly defined the final decision-maker who would bear this responsibility, and it was under the leadership of this decision-maker that many of the issues were discussed and resolved. This process built up a trust for the decision-maker in RWCL and the Organizing Committee and facilitated the response to crisis.

Clearly articulated standards for decision-making

The Rugby World Cup is significant on many levels, ranging from "a quadrennial tournament to determine the best rugby team in the world" to "an opportunity to broadcast the appeal and excitement of rugby to the entire world," "an opportunity to bring in large amounts of money from broadcasting rights, sponsorship revenues and ticket revenues" and "an opportunity for the host country and cities to stimulate tourism demand."

The response to crisis will differ depending on priorities. In Phase 2 of the typhoon response, consideration was given to a number of additional options not in the original plan, but RWCL and the Organizing Committee ultimately came to a decision on the basis of the priorities first articulated.

The highest priority is the safety of human life. Next is ensuring fair treatment for all teams as the tournament to determine the best team in world rugby. Playing and broadcasting matches follows those two in importance. By adhering to these priorities, the organizers came to the decision to cancel three matches, the first time this has ever happened in Rugby World Cup history. According to interviews with those involved, the decisions were made with the understanding of almost all stakeholders. This experience underscored the importance of clearly articulating standards for decision-making in advance and adhering to them during BAUU.

Management of expectations with advance information on the timing of announcements

The Organizing Committee set a time limit of "general public announcement no later than 6 hours prior to kickoff" for the announcement of whether a match will be played and made its announcements ahead of that schedule, successfully minimizing inquiries. Almost all stakeholders waited for the announcement from the Organizing Committee and RWCL before taking action, which further contributed to their safety. In reviewing the response to the typhoon, the organizers were able to effectively control expectations by publishing appropriate information to the fans following the games and other interested parties, and by fully sharing the expected timing of decisions.

Match schedule during the typhoon approach period

| | | |
|------------------------|---------------------------------|----------|
| 11 Oct (Fri.) 19:15 | Australia v Georgia Shizuoka | Played |
| 12 Oct (Sat.) 13:45 | New Zealand v Italy Toyota | Canceled |
| 12 Oct (Sat.) 17:15 | England v France Yokohama | Canceled |
| 12 Oct (Sat.) 19:45 | Ireland v Samoa Fukuoka | Played |
| 13 Oct (Sun.) 12:15 | Namibia v Canada Kamaishi | Canceled |
| 13 Oct (Sun.) 14:45 | USA v Tonga Hanazono | Played |
| 13 Oct (Sun.) 17:15 | Wales v Uruguay Kumamoto | Played |
| 13 Oct (Sun.) 19:45 | Japan v Scotland Yokohama | Played |

3. Summary: Evaluation of RWC 2019 typhoon response and lessons learned

Evaluation of response to Typhoon No. 19 (domestic)

With Typhoon No. 19 approaching and making a direct strike on Japan, the decision was made by RWC 2019 to cancel three matches for the first time ever in Rugby World Cup history. Cancellation was a difficult decision, but a survey of domestic residents found that 64% graded the decision as either "good" or "very good." The typhoon did not cause a single injury or fatality among the athletes, spectators and staff, and the decision to allow spectators to bring in their own beverages and other measures taken to ensure safety enabled the Japan v Scotland match to be played on 13 October, which earned additional understanding and support from many stakeholders.

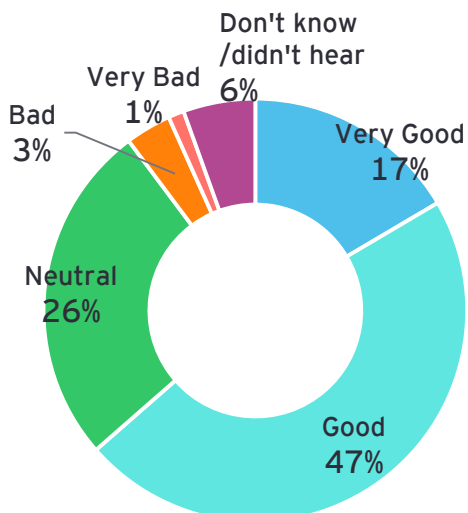
Lessons learned in responding to the typhoon

This chapter reviewed the three phases of the Contingency Plan in the Event of Typhoon and commented on seven lessons learned by RWCL and the Organizing Committee. Four of these lessons are applicable to all forms of crisis response, not just typhoons.

- ▶ Have a network in place for timely and comprehensive information gathering
- ▶ Have a flexible attitude and be willing to study additional options
- ▶ Build mechanisms for final decision-making and test them beforehand
- ▶ Articulate standards for decision-making and adhere to them in actual practice

The holding of RWC 2019 gave Japan many experiences in running international sports events, something that it has relatively little experience with. The experiences and lessons from RWC 2019, including the response to typhoon, a specific weather risk for Japan, will be viable assets for future global events here and elsewhere in the world.

Survey question: What is your opinion of the cancellation of matches due to Typhoon No. 19?



Public survey of domestic residents of Japan. n=5,688



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- ▶ Fanzone attendance referenced from data in the possession of the RWC 2019 Organizing Committee
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- ▶ Total number of stadium spectators in RWC 2019 <https://www.rugbyworldcup.com/news/538422>, accessed on 25 February 2020
- ▶ Number of tickets sold, sales rate and ticket revenue
Referenced from data in the possession of the RWC 2019 Organizing Committee
- ▶ Number of guests and sales of hospitality packages referenced from data in the possession of the RWC 2019 Organizing Committee

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- ▶ Social medias related data
Referenced from data in the possession of the RWC 2019 Organizing Committee
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- ▶ Percentage of ticket purchases from overseas
Referenced from data in the possession of the RWC 2019 Organizing Committee
- ▶ Number of spectators visiting Japan
Calculated by EY using data from the RWC 2019 Organizing Committee
- ▶ Impact Beyond 2019 related data
Referenced from data in the possession of World Rugby

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- ▶ Number of registered Volunteers
Referenced from data in the possession of the RWC 2019 Organizing Committee
- ▶ Number of volunteer applications <https://www.rugbyworldcup.com/news/351554>, accessed on 25 February 2020

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- ▶ Annual J League spectators <https://data.j-league.or.jp/SFTD12/>, accessed on 18 May 2020

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- ▶ Breakdown by tickets purchased (Japan and overseas) referenced from data in the possession of the RWC 2019 Organizing Committee
- ▶ Breakdown by tickets purchased (Core fans and Non-core fans)
Graph made by EY using the ticket purchasing data and the ticket purchaser survey
- ▶ Ticket purchasers categorized by previous rugby experience (Japan spectators)
Graph made by EY using the ticket purchasing data and the ticket purchaser survey

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- ▶ Data related to core fans, non-core fans, and overseas fans
Graph made by EY using the ticket purchasing data and the ticket purchaser survey

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- ▶ Ticket purchasing motivations
Graph made by EY using the Japan resident survey

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- ▶ Timeline of number of tickets purchased by Japan residents
Made a graph by EY using the ticket purchasing data and the ticket purchaser survey

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- ▶ Domestic peak viewing rate of RWC 2019 Japan-Scotland match
Video Research study
- ▶ Number of RWC 2019 official Twitter followers and impressions referenced from data in the possession of the RWC 2019 Organizing Committee
- ▶ Number of #RWC2019 tweets by domestic users
Graph made by EY
- ▶ Viewing population (domestic)
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- ▶ People who watched RWC 2019: Gender and age breakdown
Graph made by EY using the Japan resident survey

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- ▶ Data calculated by EY using the Japan resident survey
- ▶ Fanzones number of admissions referenced from data in the possession of the RWC 2019 Organizing Committee

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- ▶ Number of RWC 2019 inbound spectators
Referenced from data in the possession of the RWC 2019 Organizing Committee
- ▶ Data related to RWC 2019 inbound spectators
Calculated by EY using ticket purchaser database and ticket purchaser survey
- ▶ Data related to inbound visitors in 2018 Consumption Trends Survey for Foreigners Visiting Japan (2018 data, tourism and leisure purposes), Japan Tourism Agency, accessed via <http://www.mlit.go.jp/kankocho/siryoutoukei/syohuhtyou.html>, 15 May 2020

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- ▶ Documents from the RWC 2019 Organizing Committee, "Overview of RWC 2019 Crisis/Incident Management Plan", "Typhoon Contingency Plan" and "Lessons Learned from Typhoon No. 19 Crisis Response"
- ▶ Opinion of the cancellation of matches due to typhoon
Graph made by EY using the data of Japan resident survey

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