

# FIFA Women's World Cup 2023

## International Visitor Dispersion Report

4 July 2023

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# About this Report

## Overview

MI Global Partners (MIGP) has been commissioned by Ministry of Business, Innovation and Employment (MBIE) to undertake predictive modelling of international spectator behaviour whilst visiting New Zealand for the upcoming FIFA Women’s World Cup 2023 (FWWC 2023).

The objective of this report is to understand where and when the tournament spectators are likely to arrive, how long they are likely to stay, and where they may visit while they are in New Zealand (i.e., likely dispersion of visitors).

This report identifies the volume of international visitors by regional tourism organisation (RTO), how this changes throughout the tournament and potential capacity constraints.

It should be noted that MIGP projected between 24,000 and 29,300 international visitors to New Zealand for the FWWC 2023 in November 2022 based on early ticket sales and historic major event information. This report relies on additional ticketing, airline and accommodation data and insights to refine this projection.

## Disclaimer

It should be noted that specific airline, hotel and ticketing data is commercially sensitive and therefore MIGP had to rely on broad and anecdotal insights as well as publicly available data sets (i.e., Stats NZ) to assist with the development of the model.

MIGP has therefore prepared this report in conjunction with and relying on information provided by third parties. We do not imply, and it should not be construed that we have performed any audit or due diligence procedures on any of the information provided to us.

Accordingly, MIGP do not accept any responsibility for errors or omissions, or any loss or damage as a result of any persons relying on this report for any purpose other than that for which it has been prepared.

The report should not be provided to any other persons other than representatives of the New Zealand Government or made public without the prior written consent of MIGP.

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# Section 1 Introduction



# FWWC 2023 in Context

## Introduction

The FIFA Women’s World Cup (FWWC) was first contested in 1991 and has been held every four years since. Six countries have hosted the FWWC with China (1991 and 2007) and USA (1999 and 2003) each hosting the tournament twice. Sweden (1995), Germany (2011), Canada (2015) and most recently France (2019), have been the other hosts of this major global event.

The tournament was originally contested by 12 nations across three groups, playing a total of 26 matches. The tournament has grown to 16 teams and 32 matches in 1999, 24 teams and 52 matches in 2015, while the 2023 edition will host 32 teams across 64 matches. The FWWC 2023 will be held over four weeks commencing in Auckland on July 20<sup>th</sup> 2023, with the final played in Sydney on August 20<sup>th</sup> 2023.

Australia will host 35 matches across 5 cities (Sydney, Brisbane, Melbourne, Adelaide and Perth) and six venues, while New Zealand will host 29 matches across four host cities and venues (Auckland, Wellington, Dunedin and Hamilton).

## The growth of the FIFA Women’s World Cup

The FWWC has grown significantly since its inception and is now regarded as one of the biggest sporting events in the world, and by far the premier single sport women’s event.

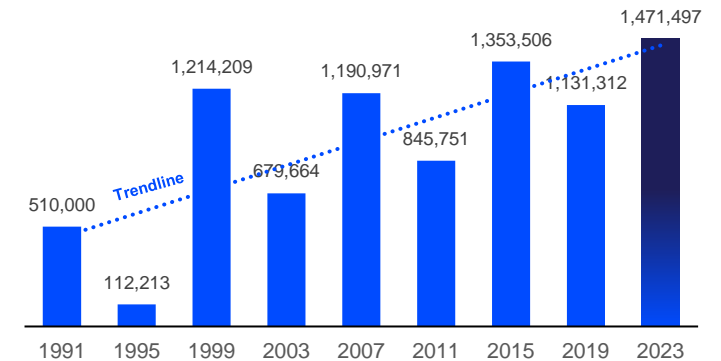
Attendance has increased from 510,000 in 1991 to 1.35 million in Canada 2015. Although some of this increase can be attributed to the expansion from 12 teams to 24 teams, average attendances have also increased significantly.

FWWC 2023 is expected to be the largest attended FWWC in history, with early forecasts of nearly 1.5 million tickets sold for the tournament.

Outside of strong attendances, the FWWC 2019 in France also saw 1.12 billion global broadcast viewers, up 30% from the 2015 edition in Canada. This included over 260 million live viewers of the final between the USA and the Netherlands, more than doubling the audience from the 2015 final. 481.5 million people also tuned into FWWC 2019 on digital platforms, a substantial increase from the 86 million digital viewers from FWWC 2015.

In addition, and in support of the significant growth of this event, SportsPro (list of the world’s most marketable properties in sport) listed the FIFA Women’s World Cup at number 13 in 2020, ahead of Formula One, LA Liga, NFL, Wimbledon, UFC and the ICC Cricket World Cup at that time.

FWWC Gross Attendances (1991 – 2023)



# Methodology

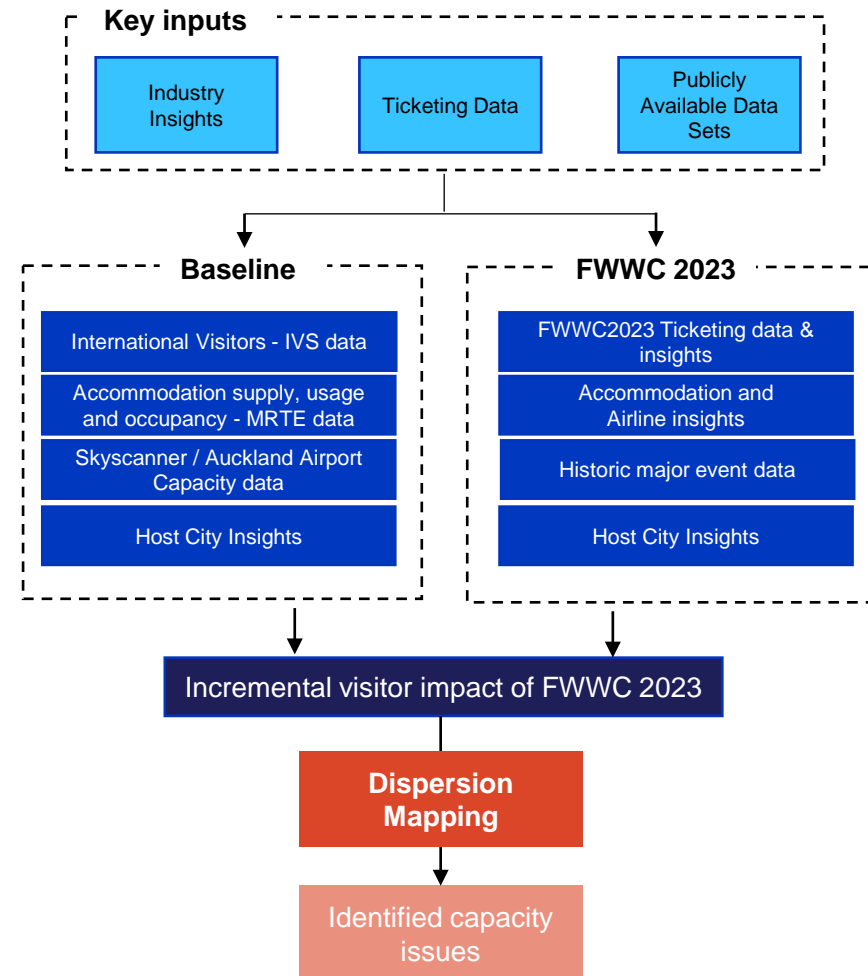
## Approach

MIGP developed a predictive visitor dispersion model utilising publicly available data and insights garnered via stakeholder engagement with the four Host Cities, and industry experts including FIFA Ticketing, a major airline, Auckland Airport, a third-party online travel operator, Holiday Parks and AirBnB.

The model assessed the impact of FWWC 2023 against a baseline scenario in July / August 2023 without New Zealand hosting the tournament (i.e., typical seasonal visitation), and therefore only the incremental international visitors attending the FWWC 2023 were modelled.

Six key steps were undertaken:

1. Established the baseline scenario of the number of expected international visitors, accommodation supply, use and occupancy, typical airline load factors, searches and bookings.
2. Utilised interim ticketing data (June 2023) and insights from the FIFA Ticketing team to forecast final tournament international attendee numbers by match.
3. Utilised ticketing, airline, and accommodation data and insights to calculate the expected international visitors (spectators) to New Zealand for the FWWC 2023.
4. Utilised ticketing data by match and aviation insights to determine likely arrival and departure dates of international spectators.
5. Utilised ticketing data by match and historic (2019) international visitor spend to map the likely dispersion of visitors by RTO during July and August, and their respective visitation journey throughout their stay in New Zealand.
6. Overlaid infrastructure supply data and insights to determine capacity issues by RTO.



# Methodology

## Key insights used in the development of the model

1. Current international visitation still tracking at only ~70% of pre-Covid levels (2019).
2. Commercial Information
3. Expectations that the international sales are close to peak, with only a small incremental uplift expected between now and tournament completion. The majority of the uplift in sales expected in the knockout phase once teams have completed their group matches, however these sales are unlikely to be new visitors.
4. Peak in airline international arrival data seen for the 18<sup>th</sup> – 22<sup>nd</sup> July 2023, particularly from the US.
5. Domestic travel load factors projected to be 7% pts higher than the current (i.e., June average)
6. Domestic travel data showing peaks around five of the marquee New Zealand and USA group matches hosted in Auckland (3) and Wellington (2). The data shows significant arrivals into host cities the day before the match and departures the day following the match meaning dwell time is minimal.
7. Airlines are not increasing capacities on both international or domestic routes throughout the tournament.
8. Hotel occupancy in Auckland for the tournament tracking to increase by 5% points on the 2023 July baseline.
9. AirBnB seeing increased listings and bookings during major events. Additionally, demographics of typical AirBnB users aligned with ticket sales (i.e., families), there is expectation that AirBnB will far exceed its current market share (20-30%) of accommodation.
10. THL and Holiday Parks are yet to see a significant spike in rentals over the tournament period, significantly less than the Rugby World Cup 2011 and 2017 Lions Tour.



## RTOs and Regions

For the purposes of this report and the dispersion mapping in Section 5, the RTOs will be referenced as the relevant region.

RTO	Region
Auckland Limited	Auckland
WREDA	Wellington
Hamilton & Waikato Tourism	Waikato
Enterprise Dunedin	Dunedin
Destination Queenstown	Queenstown
ChristchurchNZ	Christchurch
Lake Wanaka Tourism	Wanaka
Destination Rotorua	Rotorua
Tourism Bay of Plenty	Bay of Plenty
Mackenzie Region	MacKenzie
Destination Great Lake Taupa	Taupō
Northland Inc	Northland
Development West Coast	West Coast
Hawke's Bay Tourism	Hawke's Bay
NRDA	Nelson-Tasman
CEDA	Manawatu
Venture Taranaki	Taranaki
Visit Fiordland	Fiordland
Visit Southland	Southland
Destination Marlborough	Marlborough
Sum of Visit Ruapehu	Ruapehu
Destination Coromandel	Coromandel
Tourism Waitaki	Waitaki
Tourism Central Otago	Central Otago
Trust Tairāwhiti	Gisborne
Venture Timaru	Timaru
Destination Wairarapa	Wairarapa
Destination Kaikōura	Kaikōura
Hurunui Tourism	Hurunui
Visit Whanganui	Whanganui
Destination Clutha	Clutha





## Section 2 Executive Summary



# Executive Summary

## Key insights on the impact of FWWC 2023

1. As of 21<sup>st</sup> June 2023, Commercial Information tickets have been sold across the 29 New Zealand matches with over half of these tickets (53%) attributed to six marquee group matches that include host New Zealand and the number 1 ranked nation and FWWC 2019 winner the United States.
2. Commercial Information  
Commercial Information For the purpose of this analysis, the 450,000 tickets sold has been projected.
3. 85,000 of these tickets are expected from those residing from overseas, with people from the United States accounting for two-thirds of all international ticket sales.
4. Using ticket, airline and accommodation data, MIGP projected the international spectators to New Zealand for the FWWC 2023 to be ~23,000 (Range between 20,500 and 25,500). It is expected that two-thirds of these visitors (~14,900) will be from the United States, with the remaining 8,100 coming from Australia, Asia (China, Philippines, Japan), Europe (UK, Germany, Switzerland, Spain, Sweden and the Netherlands), Canada and the Middle East.
5. Of these 23,000 international spectators, 22,400 are expected to arrive in July (12.4% increase in international visitors compared to the baseline) and 600 (0.3% increase) in August.
6. It is projected that 13,850 will arrive prior to the United States opening match on the 22<sup>nd</sup> July with a second influx of 8,600 arriving by the 1<sup>st</sup> August (US third group match). A final influx of 600 expected to arrive across the knockout matches.
7. It is projected that Auckland will account for 39% of all international bed nights across the tournament, followed by 13% Wellington, 3% Hamilton and 3% Dunedin, while all other RTOs account for the remaining 37%. Queenstown and Christchurch will account for 16% and 7% of international bed nights respectively.
8. Although this report projects a fall in international visitors compared to the original projection report completed in November 2022, ticketing and airline data is showing a potential increase in length of stay (+3 nights or +25%), meaning total bed nights and international visitor spend should not be too dissimilar to the original projections.



# Executive Summary

The map depicts the maximum number of FWWC 2023 international visitors by RTO, with the supporting text outlining when this is likely to occur.

The lighter blue circles represent the four host cities of Auckland, Waikato (Hamilton), Wellington and Dunedin and the dark blue circles representing the other RTOs.

## Auckland

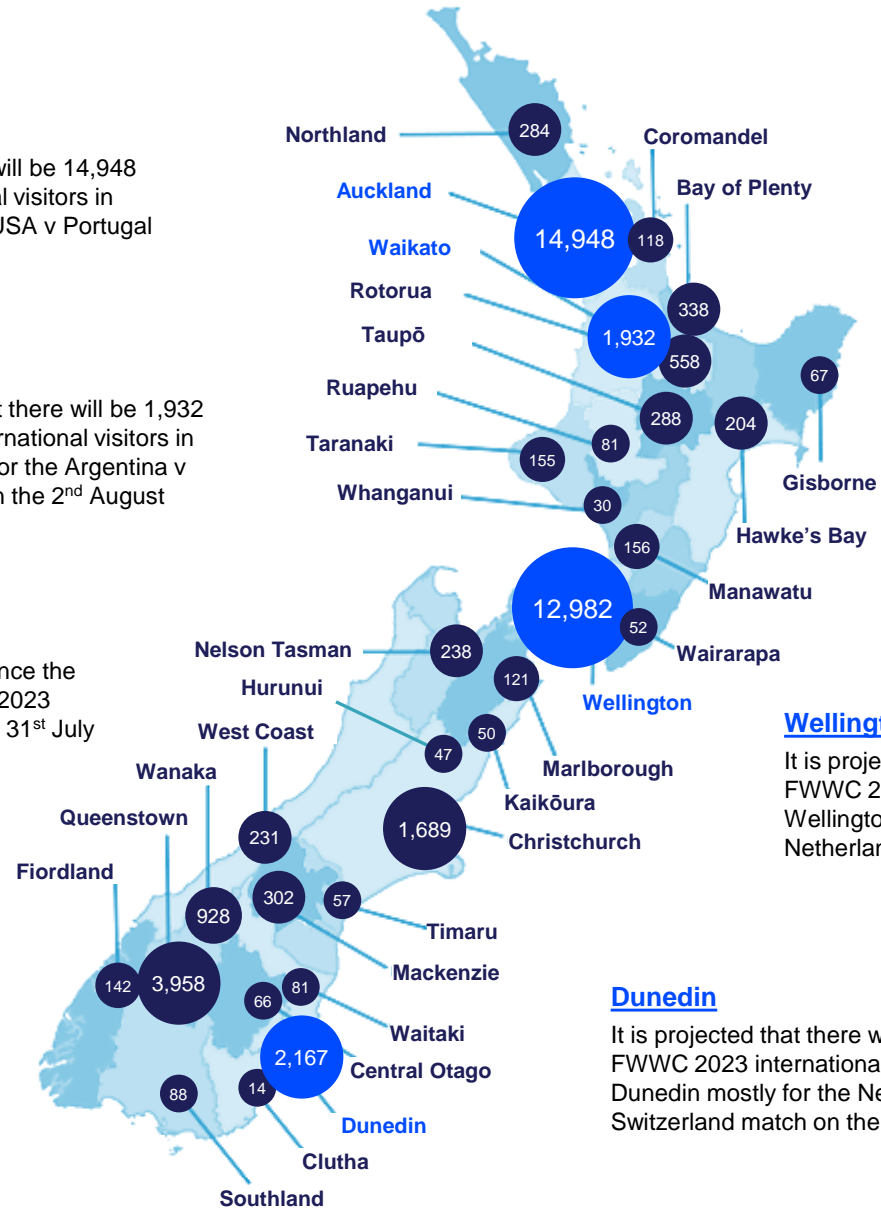
It is projected that there will be 14,948 FWWC 2023 international visitors in Auckland mostly for the USA v Portugal match on the 1<sup>st</sup> August

## Hamilton

It is projected that there will be 1,932 FWWC 2023 international visitors in Hamilton mostly for the Argentina v Sweden match on the 2<sup>nd</sup> August

## All other RTOs

All other RTOs will experience the highest number of FWWC 2023 international visitors on the 31<sup>st</sup> July



## Wellington

It is projected that there will be 12,982 FWWC 2023 international visitors in Wellington mostly for the USA v Netherlands match on the 27<sup>th</sup> July

## Dunedin

It is projected that there will be 2,167 FWWC 2023 international visitors in Dunedin mostly for the New Zealand v Switzerland match on the 30<sup>th</sup> July

# Executive Summary

Based on the projected international visitation and dispersion of 23,000 spectators across 36 days of the tournament (including a few days pre and post tournament), there is only one potential capacity issue identified.

Wellington is hosting New Zealand vs Philippines on the 25<sup>th</sup> July followed by the United States second group match versus Netherlands on the 27<sup>th</sup> July.

It is projected that the majority of United States fans will travel to Wellington, mostly the day of or the day before the match creating a potential accommodation issue.

However, hotel data 6 weeks out from the tournament suggests there is still unutilised capacity in Wellington’s hotels and other available accommodation, and insights from AirBnB suggest listings are strong and likely to further increase closer to the tournament start to meet any unmatched demand.



Maximum number of international FWWC 2023 visitors during each four-day block

RTO	13th July - 16th July	17th July - 20th July	21st July - 24th July	25th July - 28th July	29th July - 1st Aug	2nd Aug - 5th Aug	6th Aug - 9th Aug	10th Aug - 13th Aug	14th Aug - 17th Aug
Auckland	1,630	7,390	10,941	7,094	14,948	7,023	5,933	5,350	6,796
Wellington	397	781	2,100	12,982	3,931	2,202	1,443	5,211	734
Waikato	134	264	708	1,624	838	1,932	488	379	249
Dunedin	111	218	1,806	1,055	2,167	467	404	313	205
Queenstown	903	1,778	2,601	3,824	3,958	3,805	3,287	2,553	1,673
Christchurch	385	759	1,110	1,632	1,689	1,623	1,403	1,089	714
Wanaka	212	417	610	897	928	892	771	599	392
Rotorua	127	251	366	539	558	536	463	360	236
Bay of Plenty	77	152	222	327	338	325	281	218	143
MacKenzie	69	136	199	292	302	291	251	195	128
Taupō	66	130	189	279	288	277	239	186	122
Northland	65	128	187	275	284	273	236	183	120
West Coast	53	104	152	223	231	222	192	149	98
Hawke’s Bay	47	92	134	197	204	196	170	132	86
Nelson-Tasman	54	107	156	230	238	229	198	153	101
Manawatu	36	70	102	150	156	150	129	100	66
Taranaki	35	70	102	150	155	149	129	100	65
Fiordland	32	64	93	137	142	136	118	92	60
Southland	20	40	58	85	88	85	73	57	37
Marlborough	28	55	80	117	121	117	101	78	51
Ruapehu	18	36	53	78	81	78	67	52	34
Coromandel	27	53	77	114	118	113	98	76	50
Waitaki	19	36	53	78	81	78	67	52	34
Central Otago	15	30	43	63	66	63	55	42	28
Gisborne	15	30	44	64	67	64	55	43	28
Timaru	13	26	37	55	57	55	47	37	24
Wairarapa	12	23	34	50	52	50	43	34	22
Kaikōura	11	22	33	48	50	48	41	32	21
Hurunui	11	21	31	45	47	45	39	30	20
Whanganui	7	14	20	29	30	29	25	20	13
Clutha	3	6	9	13	14	13	11	9	6

## Section 3 Establishing a Baseline



# International Visitation

Despite all international borders remaining open, international visitors to New Zealand in 2023 is tracking at 70% of pre Covid levels in 2019.

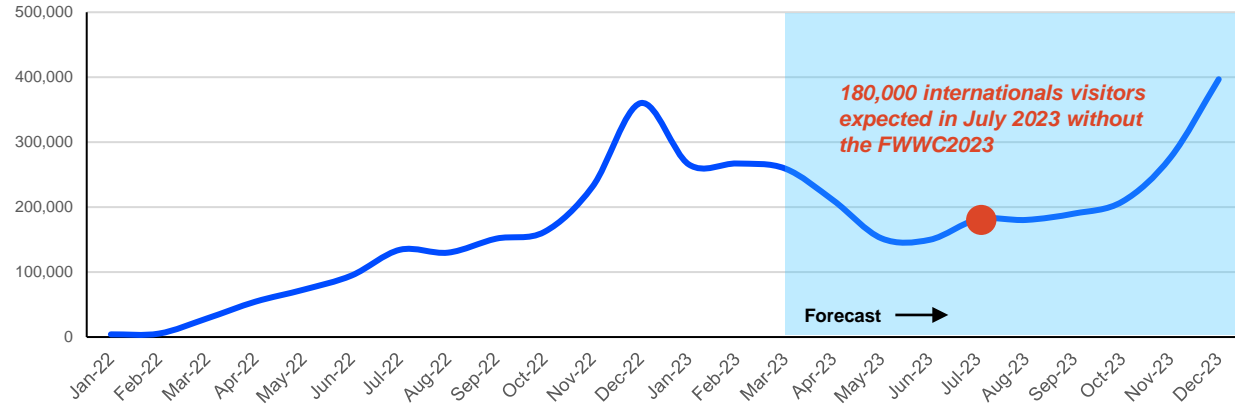
Without the FWWC 2023 tournament, it is projected that on average both July and August will see 180,000 international visitors each month, down from 255,585 in July 2019 and 251,131 in August 2019.

In 2019, Australia accounted for 40% of all international arrivals, followed by 10% China, 9% United States and 6% from the United Kingdom.

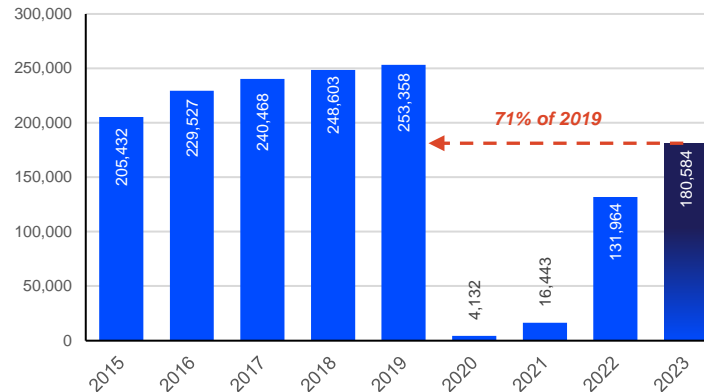
As the recovery from Covid-19 continues, 2022/23 data shows Australian arrivals are up 11% points to 51% of all arrivals and the US and UK arrivals up 1% point each to 10% and 7% respectively. Chinese arrivals are down nearly 400,000 since 2019 to account for just 2% of international arrivals.

*For July 2023 (without FWWC 2023), it is projected 180,000 internationals will visit New Zealand*

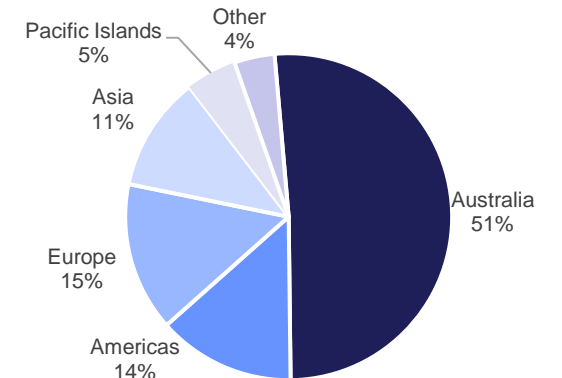
Monthly International Arrivals (2022 – 2023 Forecast)



Average July / August International Arrivals (2015 – 2023)



Country of residence of international visitors (2022/23)



## Airline seat capacities and typical load factors

July 2023 is expected to see a capacity of 680,000 seats arriving in New Zealand, which equates to just under 22,000 per day.

69% of these seats are from short haul flights and neighbouring Oceania / Pacific nations including Australia (56%), while the other 31% is from Asia (18%), Americas (11%) and the Middle East (2%).

Of these, it is expected that 15,530 seats will be occupied per day, which is an average load factor of 70.9%.

Based on the 180,000 international arrivals for the month of July, it is therefore estimated around 5,800 internationals will arrive in New Zealand per day (38%), and the remaining ~9,700 (62%) being returning New Zealand nationals.

This is in line with historic July border crossing data, which suggests 42% of July arrivals are international visitors.

*It is estimated that July 2023 without the FWWC 2023 would see 15,530 arrivals per day, equating to a load factor of 71%*

Seat Capacity and estimated arrivals by region – July 2023

Region	Monthly Seat Capacity	Daily Seat Capacity	Average Daily Seats Occupied	Average Load Factor
<b>Short Haul Flights</b>				
Australia	382,405	12,336	8,861	71.8%
Pacific Island	84,619	2,730	1,961	
<b>Long Haul Flights</b>				
Asia	121,433	3,917	2,695	
Americas	75,561	2,437	1,677	68.8%
Middle East	15,159	489	336	
<b>Total</b>	<b>679,176</b>	<b>21,909</b>	<b>15,530</b>	<b>70.9%</b>

*Note: Load factor is a metric used in the airline industry that measures the percentage of available seating capacity that has been filled with passengers. A high load factor indicates that an airline has sold most of its available seats and is preferred over a low load factor.*

# Accommodation Supply

According to the Accommodation Survey conducted in 2019, there are nearly 3,000 accommodation establishments and 137,000 rooms / units available across New Zealand.

Hotels account for 41% share of total guest nights despite only accounting for a total of 25% share of the accommodation capacity. The average occupancy across all 533 hotels across New Zealand during the July and August months is 62%.

It should be noted that the Accommodation Survey does not account for AirBnB and paid private home accommodation. It is believed that AirBnB have a market share of between 20-30% of all accommodation in New Zealand. This varies by urban versus regional areas, with regional areas seeing a higher share due to a lack of other accommodation options. It also varied by type of travel (i.e., leisure indexes higher over business travel) and demography (i.e., younger age groups also index higher).

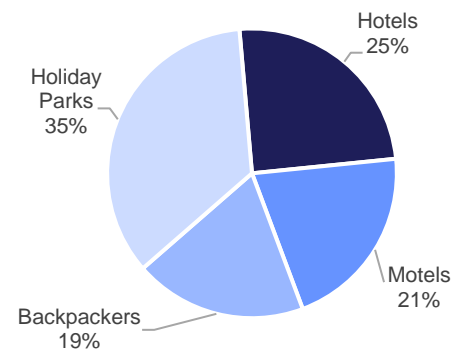
Families can also preference AirBnB over hotels due to travel group size and the significant costs associated with multiple hotel rooms.

NZ Accommodation (excluding AirBnB / Private Homes) – July / Aug 2019 Average

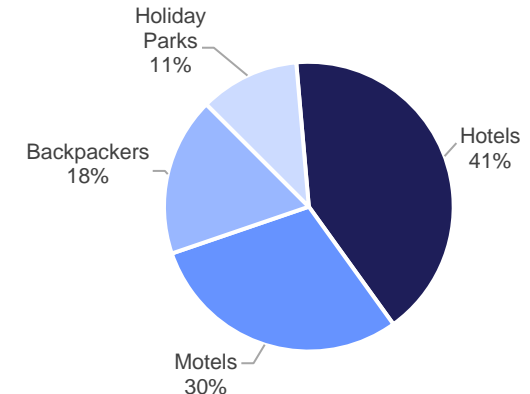
Type	Number of establishments	Daily capacity (stay-units)	Stay-unit nights occupancy	Daily guest arrivals	Occupancy	Avg Nights
Hotels	533	33,973	21,094	19,256	62%	1.85
Motels	1,663	28,657	15,105	14,244	53%	2.02
Backpackers	364	26,453	9,021	4,073	34%	2.54
Holiday Parks	394	48,001	5,658	4,146	12%	2.67
<b>Total</b>	<b>2,954</b>	<b>137,083</b>	<b>50,878</b>	<b>41,720</b>	<b>37%</b>	<b>2.06</b>

Source: Accommodation Survey 2019

Share of Capacity (excludes AirBnB)



Share of Occupancy (excludes AirBnB)





## Hotel accommodation by RTO

The table outlines the total hotel capacity and average occupancy as per July and August 2019 for each of the RTOs.

In total, there are 530 hotel establishments and 33,914 units / rooms available across New Zealand.

On average, hotels have an occupancy of 61%, with the four FWWC 2023 host cities having an average occupancy of 64.5%.

It should be noted that this data is sourced from the accommodation survey in 2019, with recent Accommodation Data Programmer (ADP) April 2023 data indicating Auckland alone has added a further 640 stay units (10,900 in total) since the beginning of Covid-19.

Hotel accommodation (excluding AirBnB / Private Homes) by RTO – July / Aug 2019 Average

RTO	Number of establishments	Daily capacity (stay-units)	Stay-unit nights occupancy	Daily guest arrivals	Occupancy	Avg Nights
Auckland	83	10,263	7,511	6,901	73%	1.75
Bay of Plenty	8	465	234	194	50%	1.92
Canterbury	49	3,252	1,976	1,753	61%	1.81
Central Otago	12	173				
Clutha	8	87				
Coromandel	9	166	61	65	37%	1.95
Dunedin	16	818	412	406	50%	1.55
Fiordland	6	553	125	165	23%	1.51
Gisborne	5	167				
Hawke's Bay	18	545	292	248	54%	1.83
Hurunui	6	131				
Mackenzie	4	414				
Manawatu	14	478	215	229	45%	1.41
Marlborough	13	304	98	122	32%	1.52
Nelson-Tasman	10	374	148	143	40%	1.73
Northland	28	1,078	322	321	30%	1.68
Queenstown	38	3,250	2,684	1,803	83%	2.78
Rotorua	22	1,828	1,206	1,343	66%	1.76
Ruapehu	8	385	242	288	63%	1.96
Southland	19	497	216	166	43%	1.72
Taranaki	20	623	275	250	44%	1.75
Taupō	8	532	273	311	51%	1.72
Timaru	6	103				
Waikato	21	917	550	462	60%	1.98
Wairarapa	10	226	89	87	39%	1.83
Waitaki	10	391	128	167	33%	1.43
Wanaka	10	466	306	213	66%	3.28
Whanganui	3	112				
Wellington	40	3,829	2,861	2,404	75%	1.83
West Coast	29	1,489	330	440	22%	1.38
<b>Total</b>	<b>530</b>	<b>33,914</b>	<b>20,553</b>	<b>18,500</b>	<b>61%</b>	<b>1.90</b>

Source: Accommodation Survey 2019

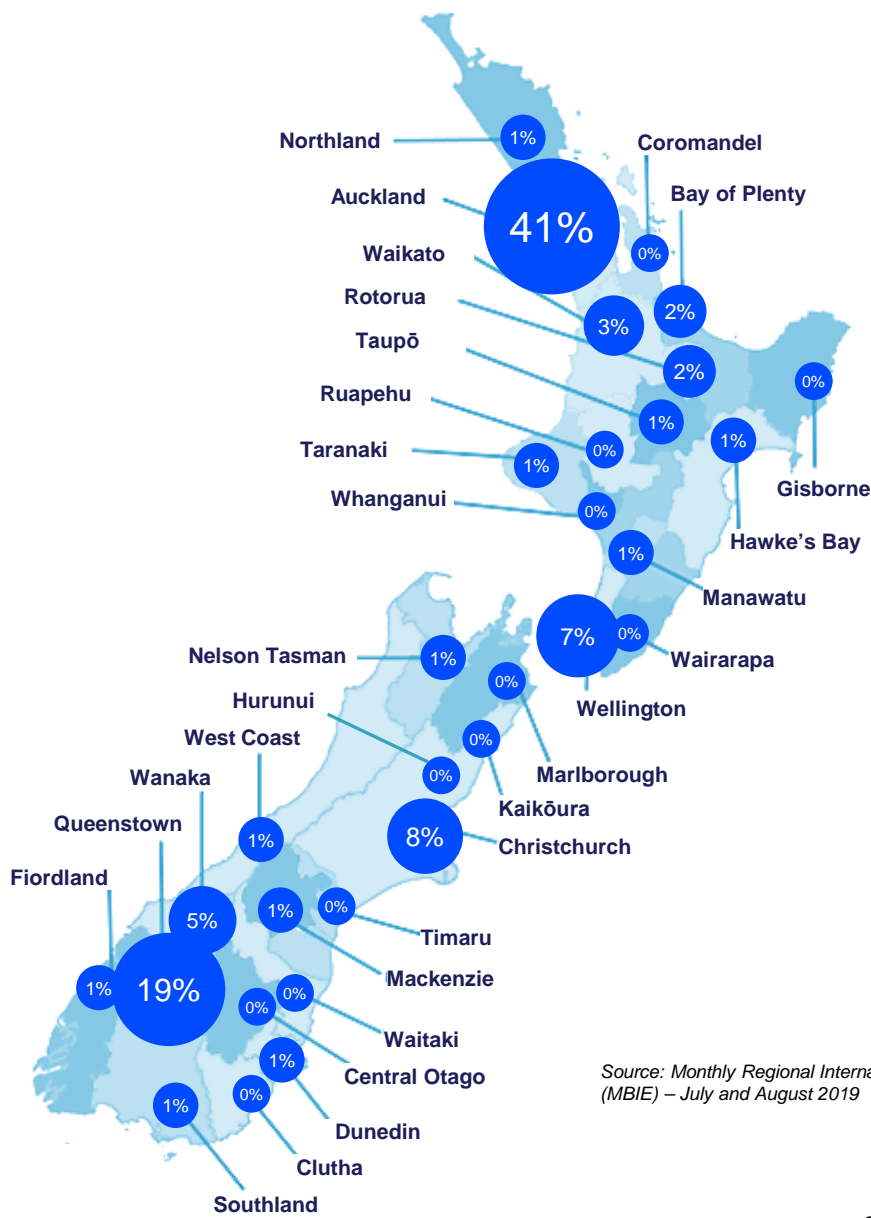
COMMERCIAL IN CONFIDENCE

## Tourism spend by RTO

Historically, throughout the winter months, Auckland accounts for 41% of all international tourism spend, double the second highest RTO in Queenstown (19%).

The other FWWC 2023 host cities in Wellington, Hamilton (Waikato) and Dunedin account for 7%, 3% and 1% of international tourism spend.

Spend by RTO can differ by the origin of the international visitor. This underlying data will be weighted according to the expected origin of FWWC 2023 visitors, which will then be utilised as a baseline proxy for the dispersion of international tourists across New Zealand for FWWC 2023, outside of match attendance.



Source: Monthly Regional International Tourism Estimates (MBIE) – July and August 2019

## Summary of baseline data

1. International visitors to New Zealand in 2023 is tracking at 70% of pre Covid levels in 2019, with 180,000 international visitors expected in July 2023 without the FWWC 2023.
2. The average load factor in June and July (outside of school holidays) for long haul flights to New Zealand is 68.8%, and short haul flights is 71.8%.
3. According to the Accommodation Survey conducted in 2019, there are nearly 3,000 accommodation establishments and 137,000 rooms / units available across New Zealand (excludes AirBnB and paid private homes).
4. In total and prior to Covid-19, there are 530 hotel establishments and 33,914 units / rooms available across New Zealand.
5. On average hotels have an occupancy of 61%, with the four FWWC 2023 host cities having an average occupancy of 64.5%.
6. It is estimated that AirBnB have a market share of between 20-30% of all accommodation in New Zealand.
7. Historically, throughout the winter months, Auckland accounts for 41% of all international tourism spend, more than double the second highest RTO in Queenstown (19%).
8. The other FWWC 2023 host cities in Wellington, Hamilton (Waikato) and Dunedin account for 7%, 3% and 1% of international tourism spend.



## Section 4 Impact of FWWC 2023



# Ticket Sales

As of 21<sup>st</sup> June 2023, Commercial Information tickets have been sold across the 29 New Zealand matches.

Over half of these tickets (53%) have been attributed to six marquee group matches that include host New Zealand and the number 1 ranked nation and FWWC 2019 winner the United States.

The three quarter-finals and semi-finals account for another 19% of all tickets sold making 72% of all tickets sold attributed to nine marquee matches, a third of all matches in New Zealand.

The nine matches in Auckland account for 50% of all tickets, with matches in Wellington, Dunedin and Hamilton accounting for 35%, 10% and 5% respectively.

Commercial Information For the purpose of this analysis, the 450,000 tickets sold has been projected.

Current and projected FWWC 2023 Ticket Sales by Host City

Venue	# of matches	Current Total Tickets Sold*	% of Current Tix Sold	Projected Total Tickets Sold	% of Projected Tix Sold
Auckland	9	<span style="background-color: #cccccc;">Commercial Info</span>	50%	194,723	43%
Wellington	9	<span style="background-color: #cccccc;">Commercial Info</span>	35%	160,280	36%
Dunedin	6	<span style="background-color: #cccccc;">Commercial Info</span>	10%	60,056	13%
Hamilton	5	<span style="background-color: #cccccc;">Commercial Info</span>	5%	34,940	8%
<b>Total</b>	<b>29</b>	<span style="background-color: #cccccc;">Commercial Info</span>	<b>100%</b>	<b>450,000</b>	<b>100%</b>

Current and projected FWWC 2023 Ticket Sales by Match

Venue	Team A	Team B	Match Type	Current Total Tickets Sold*	Projected Total Tickets Sold
AUC	New Zealand	Norway	Opening	<span style="background-color: #cccccc;">Commercial Info</span>	32,218
DUN	Philippines	Switzerland	Group	<span style="background-color: #cccccc;">Commercial Info</span>	10,677
WEL	Spain	Costa Rica	Group	<span style="background-color: #cccccc;">Commercial Info</span>	15,930
HAM	Zambia	Japan	Group	<span style="background-color: #cccccc;">Commercial Info</span>	9,015
AUC	United States	Vietnam	Group	<span style="background-color: #cccccc;">Commercial Info</span>	30,541
DUN	Netherlands	Portugal	Group	<span style="background-color: #cccccc;">Commercial Info</span>	10,677
WEL	Sweden	South Africa	Group	<span style="background-color: #cccccc;">Commercial Info</span>	15,930
AUC	Italy	Argentina	Group	<span style="background-color: #cccccc;">Commercial Info</span>	14,252
WEL	New Zealand	Philippines	Group	<span style="background-color: #cccccc;">Commercial Info</span>	23,821
HAM	Switzerland	Norway	Group	<span style="background-color: #cccccc;">Commercial Info</span>	7,325
AUC	Spain	Zambia	Group	<span style="background-color: #cccccc;">Commercial Info</span>	10,180
DUN	Japan	Costa Rica	Group	<span style="background-color: #cccccc;">Commercial Info</span>	7,340
WEL	United States	Netherlands	Group	<span style="background-color: #cccccc;">Commercial Info</span>	29,500
HAM	Portugal	Vietnam	Group	<span style="background-color: #cccccc;">Commercial Info</span>	5,634
DUN	Argentina	South Africa	Group	<span style="background-color: #cccccc;">Commercial Info</span>	6,673
WEL	Sweden	Italy	Group	<span style="background-color: #cccccc;">Commercial Info</span>	14,160
DUN	Switzerland	New Zealand	Group	<span style="background-color: #cccccc;">Commercial Info</span>	18,017
AUC	Norway	Philippines	Group	<span style="background-color: #cccccc;">Commercial Info</span>	10,180
WEL	Japan	Spain	Group	<span style="background-color: #cccccc;">Commercial Info</span>	10,030
HAM	Costa Rica	Zambia	Group	<span style="background-color: #cccccc;">Commercial Info</span>	5,634
AUC	Portugal	United States	Group	<span style="background-color: #cccccc;">Commercial Info</span>	30,541
DUN	Vietnam	Netherlands	Group	<span style="background-color: #cccccc;">Commercial Info</span>	6,673
HAM	Argentina	Sweden	Group	<span style="background-color: #cccccc;">Commercial Info</span>	7,332
WEL	South Africa	Italy	Group	<span style="background-color: #cccccc;">Commercial Info</span>	8,850
AUC	Norway**	Japan**	Rd 16	<span style="background-color: #cccccc;">Commercial Info</span>	20,360
WEL	Spain**	New Zealand**	Rd 16	<span style="background-color: #cccccc;">Commercial Info</span>	21,019
WEL	Japan**	United States**	QF	<span style="background-color: #cccccc;">Commercial Info</span>	21,040
AUC	Spain**	Sweden**	QF	<span style="background-color: #cccccc;">Commercial Info</span>	21,652
AUC	Norway**	Japan**	SF	<span style="background-color: #cccccc;">Commercial Info</span>	24,798
<b>Total</b>				<span style="background-color: #cccccc;">Commercial Info</span>	<b>450,000</b>

Source: FWWC 2023 Ticketing Report

\* As of 21<sup>st</sup> June 2023

\*\* Projected teams based on current ranking

# International Ticket Sales

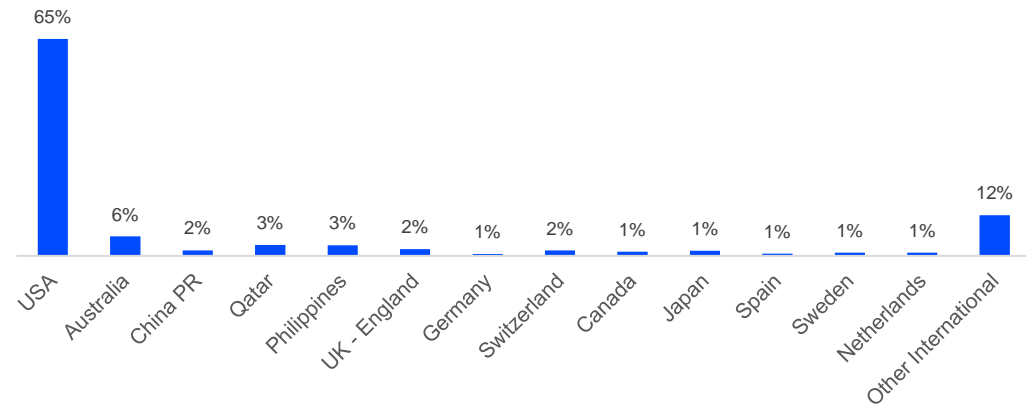
As of 21<sup>st</sup> June 2023, just over Commercial Informa tickets have been sold to people who have registered their FIFA ticketing account using an overseas location.

Considering a proportion of these sales are large group sales for local attendees, anomalies and outdated account details, it is projected the actual ticket sales for international attendees is 85,000 (17% of all projected sales).

Although it is projected that an additional 195,000 tickets will be purchased prior to the completion of the tournament, it is expected that international sales will be minimal and mostly expected to be for the Quarter Finals and Semi Finals where the United States is expected to play. Other small increases are expected across the marquee group matches.

It is projected that sales from the United States will account for over two-thirds of all international ticket sales.

Share of international ticket sales



Projected FWWC 2023 International Ticket Sales by Match


Venue	Team A	Team B	Match Type	Projected Total Tickets Sold
AUC	New Zealand	Norway	Opening	5,596
DUN	Philippines	Switzerland	Group	1,570
WEL	Spain	Costa Rica	Group	848
HAM	Zambia	Japan	Group	605
AUC	United States	Vietnam	Group	9,694
DUN	Netherlands	Portugal	Group	725
WEL	Sweden	South Africa	Group	959
AUC	Italy	Argentina	Group	3,321
WEL	New Zealand	Philippines	Group	3,830
HAM	Switzerland	Norway	Group	1,265
AUC	Spain	Zambia	Group	1,304
DUN	Japan	Costa Rica	Group	562
WEL	United States	Netherlands	Group	12,425
HAM	Portugal	Vietnam	Group	405
DUN	Argentina	South Africa	Group	585
WEL	Sweden	Italy	Group	2,335
DUN	Switzerland	New Zealand	Group	1,748
AUC	Norway	Philippines	Group	2,449
WEL	Japan	Spain	Group	1,619
HAM	Costa Rica	Zambia	Group	250
AUC	Portugal	United States	Group	11,777
DUN	Vietnam	Netherlands	Group	495
HAM	Argentina	Sweden	Group	1,398
WEL	South Africa	Italy	Group	591
AUC	Norway**	Japan**	Rd 16	1,693
WEL	Spain**	New Zealand**	Rd 16	905
WEL	Japan**	United States**	QF	4,970
AUC	Spain**	Sweden**	QF	4,358
AUC	United States**	Sweden**	SF	6,771
<b>Total</b>				<b>85,053</b>

Source: FWWC 2023 Ticketing Report

\* As of 21<sup>st</sup> June 2023

\*\* Projected teams based on current ranking

# Projected International Spectators – Ticketing Data

The ticketing data and other historic major events suggests that each international ticketing purchaser will attend on average  matches each.

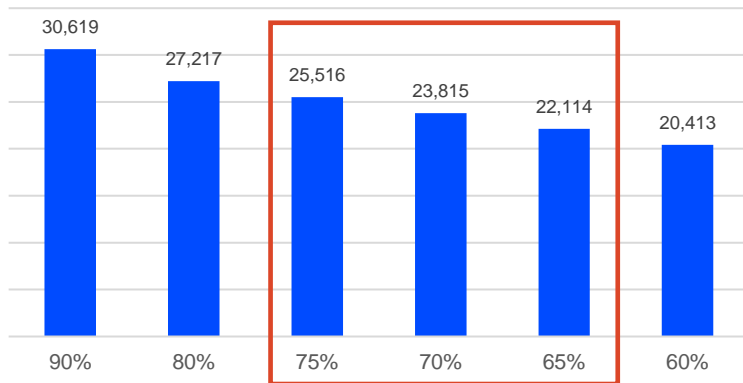
When estimating new visitors for an event, you must consider only those that are travelling to the host region specifically for the event (i.e., in-scope visitors). There are always a proportion of international attendees that are in the host region for other reasons and would visit the region regardless of hosting the event (i.e., out of scope).

The percentage of attendees in scope can vary between 60% and 90%, depending on the event type and geographical location of the host region.

Using historic major event data, it is estimated that the in-scope percentage will range between 65% - 75% for this event (e.g. RWC 2011 – 76%, Asian Cup 2015 – 71%). Therefore, it is projected that using ticketing data, the unique international spectators will range between 22,000 and 25,500.

It should be noted that the original projections completed in November 2022 using early ticketing data and historic major event data, projected the unique international visitors of between 24,000 and 29,300.

Projecting Unique International Visitors by In scope %



*Using the ticketing data, it is estimated that between 22,000 – 25,500 unique international spectators will visit New Zealand for the FWWC 2023, down ~10% from the original November 2022 projections*



# Projected International Spectators – Skyscanner Data

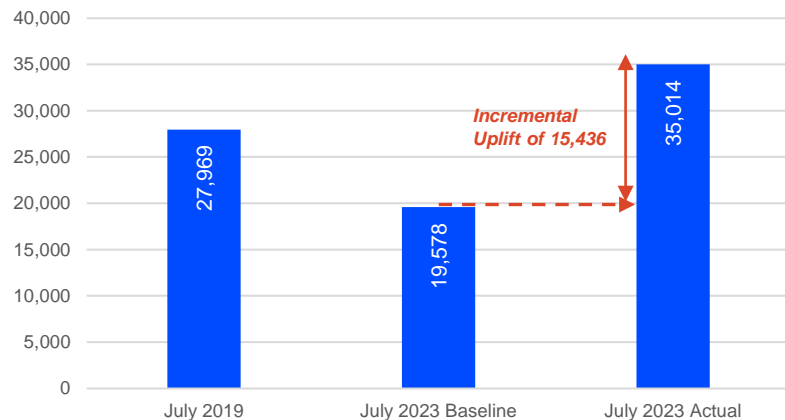
Skyscanner is an Online Travel Agency (OTA) where consumers can research, compare and book flights across several airlines.

A review of Skyscanner data indicated there has been a significant uplift in searches for international flights to New Zealand for July 2023 compared to July 2019.

US customer data found that searches for July 2023 to New Zealand are up 25% against July 2019, and 79% against a July 2023 baseline (i.e., 70% of 2019).

This results in an incremental uplift of 15,436 searches from US customers to New Zealand for the FWWC 2023.

Searches – US to New Zealand



Source: Skyscanner

According to consumer research conducted in 2019\*, Skyscanner has a market share of ~16% of all airline ticket purchasing.

Using the Skyscanner market share and the incremental uplift for July 2023 that could be attributed to the FWWC 2023 (i.e., 15,436), it is estimated that a total of 96,149 searches have been made across all channels from the US to travel to New Zealand for the FWWC 2023.

According to other consumer research\*\* conducted, travel has an overall average conversion rate of 4.7%, with top performers converting up to 18.2%.

By applying these conversion rates, we can estimate that total US bookings for FWWC 2023 is between 4,519 (i.e., 4.7% conversion) and 17,499 (i.e., 18.2% conversion).

*Using the expectation that 65% of all international spectators are from the US, the total estimated international visitors for FWWC 2023 using the Skyscanner data is between 6,917 and 26,785.*

\*[https://www.consumerinsight.co.kr/etravel/report\\_view.aspx?idx=3116#:~:text=Despite%20the%20fiercer%20competition%20of,is%20the%20second%2Dlargest%20player.](https://www.consumerinsight.co.kr/etravel/report_view.aspx?idx=3116#:~:text=Despite%20the%20fiercer%20competition%20of,is%20the%20second%2Dlargest%20player.)

\*\*<https://www.ruleranalytics.com/blog/insight/travel-marketing-statistics/>



# Projected International Spectators – Airline Data

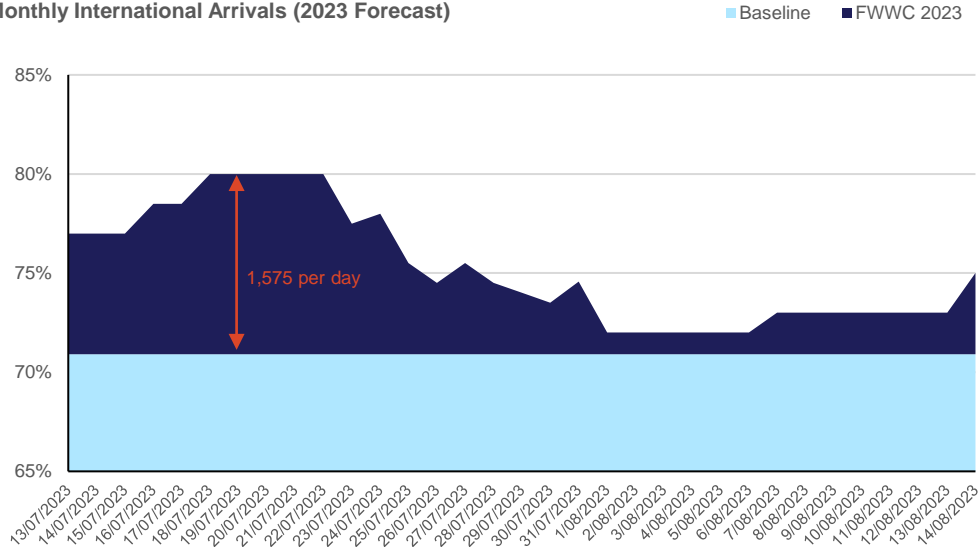
MIGP sourced specific load factor data from the airline industry to determine whether there was an uplift in flight occupancy during the tournament, both from Australia and long-haul flights from Asia and North America.

This data is commercially sensitive and therefore MIGP have accumulated the data points to demonstrate this uplift.

The data has identified a peak uplift in load factor from the 18<sup>th</sup> and the 22<sup>nd</sup> July 2023, consistent with the start of the tournament. This equates to a peak of 1,575 international visitor arrivals per day during this period that can be attributed to the tournament.

Overall, from the 13<sup>th</sup> July to the 14<sup>th</sup> August (i.e., the day prior to the last FWWC 2023 in New Zealand), the airline data estimates the international visitors to be 23,092, with a range between 20,624 and 25,561.

Monthly International Arrivals (2023 Forecast)

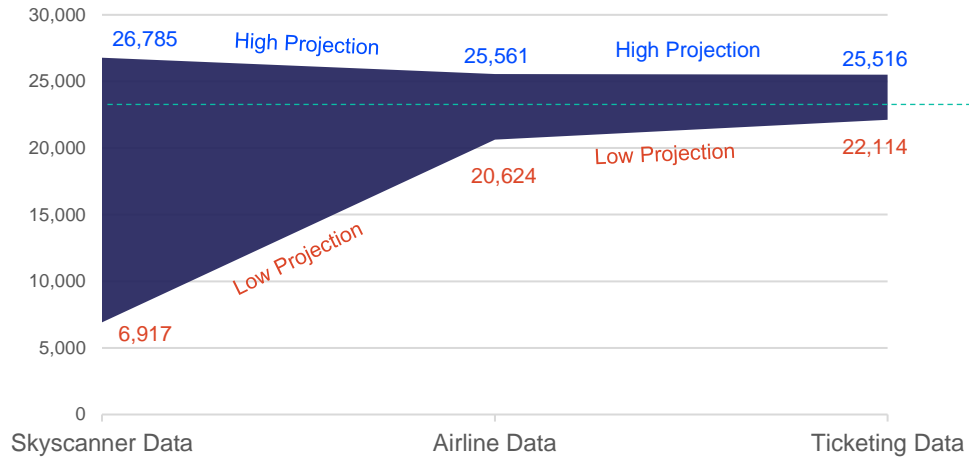


*Using the airline data, it is estimated that between 20,600 – 25,600 unique international spectators will visit New Zealand for the FWWC 2023*

# Projected International Spectators

Using the three data sources, MIGP project the international spectators to New Zealand for the FWWC 2023 to be ~23,000.

International Visitor Projections



It is expected that two-thirds of these visitors (~14,900) will be from the United States, with the remaining 8,100 coming from Australia, Asia (China, Philippines, Japan), Europe (UK, Germany, France, Spain), Canada and the Middle East.



## Supporting Accommodation Data

MIGP undertook consultation with a third-party online travel operator, Holiday Parks and AirBnB to understand current and forecasted bookings across several accommodation options for the tournament. Although there are no specific data points to support the 23,000 visitors, insights include:

1. Hotel occupancy in Auckland for the tournament tracking to jump 5% points on the 2023 July baseline.
2. 57% of international hotel bookings thus far have originated from the United States which closely aligns with ticketing data.
3. 62% of hotel bookings for the tournament window in Auckland, followed by 28% in Wellington, 6% in Dunedin and 4% Hamilton which again which closely aligns with ticketing data.
4. 80% of forecasted hotel bookings in Auckland during the tournament expected to be internationals, up from a baseline of 40%.
5. AirBnB seeing increased listings and bookings during major events and with demographics of typical uses of AirBnB aligned with ticket sales (i.e., families), expectation that AirBnB will far exceed its current market share (20-30%) of accommodation.
6. THL and Holiday Parks are yet to see a significant spike in rentals over the tournament period, significantly less that Rugby World Cup 2011 and the 2017 Lions Tour.



# Arrivals and Departures

MIGP have utilised the international ticketing sales for each match and the airline data to predict the likely arrival and departure of the 23,000 international visitors.

# Commercial Information

Projected FWWC 2023 International Ticket Sales by Date and Match

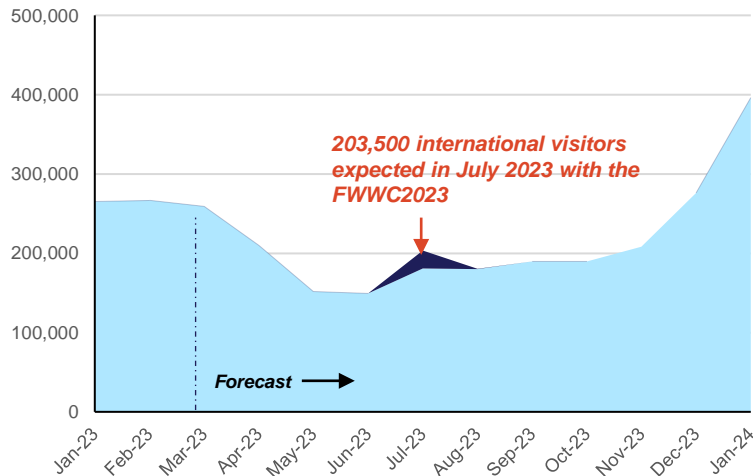
Date	Match 1	Venue 1	Projected Tix Sold	Match 2	Venue 2	Projected Tix Sold
20 July 2023	Opening   NZL v NOR	AUC	5,596			
21 July 2023	Group   PHI v SUI	DUN	1,570	Group   ESP v CRC	WEL	848
22 July 2023	Group   USA v VIE	AUC	9,694	Group   ZAM v JPN	HAM	605
23 July 2023	Group   NED v POR	DUN	725	Group   SWE v RSA	WEL	959
24 July 2023	Group   ITA v ARG	AUC	3,321			
25 July 2023	Group   NZL v PHI	WEL	3,830	Group   SUI v NOR	HAM	1,265
26 July 2023	Group   ESP v ZAM	AUC	1,304	Group   JPN v CRC	DUN	562
27 July 2023	Group   USA v NED	WEL	12,425	Group   POR v VIE	HAM	405
28 July 2023	Group   ARG v RSA	DUN	585			
29 July 2023	Group   SWE v ITA	WEL	2,335			
30 July 2023	Group   SUI v NZL	DUN	1,748	Group   NOR v PHI	AUC	2,449
31 July 2023	Group   JPN v ESP	WEL	1,619	Group   CRC v ZAM	HAM	250
1 August 2023	Group   POR v USA	AUC	11,777	Group   VIE v NED	DUN	495
2 August 2023	Group   ARG v SWE	HAM	1,398	Group   RSA v ITA	WEL	591
5 August 2023	R16   ESP v NZL*	WEL	905	R16   NOR v JAP*	AUC	1,693
11 August 2023	QF   JAP v USA*	WEL	4,970	QF   ESP v SWE*	AUC	4,358
15 August 2023	SF   USA v SWE*	AUC	6,771			

\* Projected teams based on current ranking

# Impact of FWWC 2023

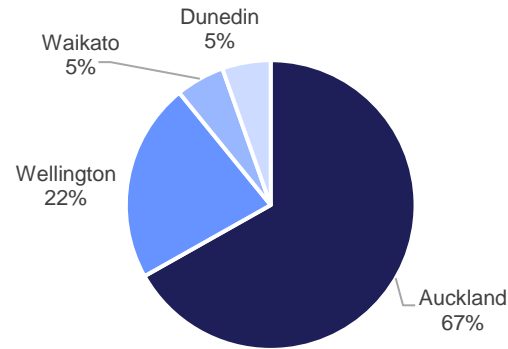
A total of 23,000 international visitors (spectators) are expected to visit New Zealand for the FWWC 2023, with 22,400 arriving in July (12.4% increase in international visitors compared to the baseline) and 600 (0.3% increase) in August.

Monthly International Arrivals (2023 Forecast) ■ Baseline ■ FWWC 2023

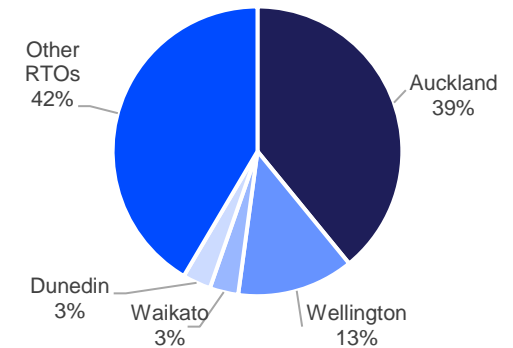


The dispersion of these international visitors is detailed in the following section; however, the graphics below summarises the total proportion of bed nights across the host cities and other RTOs.

Share of Bed Nights (Host Cities Only)



Share of Bed Nights (Incl Other RTOs)



Third party accommodation data indicates that Auckland accounts for 62% of all current booking in the four host cities, followed by 28% Wellington, 4% Hamilton and 6% Dunedin which closely aligns with the distribution of bed nights above.

# Section 5 Visitor Dispersion Mapping



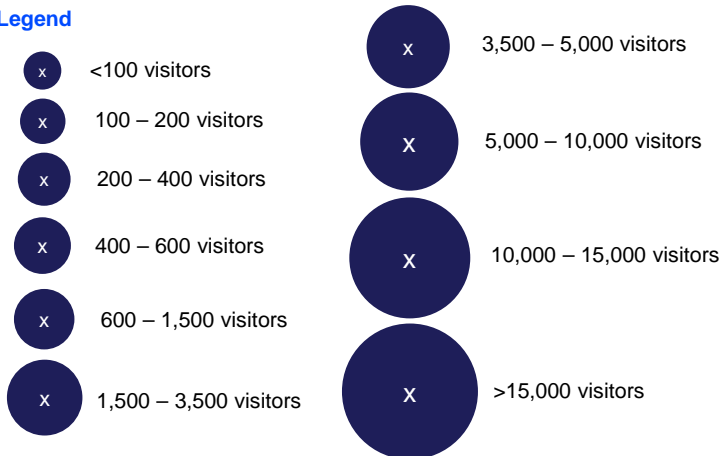
# Introduction

The dispersion of FWWC 2023 international visitors was determined by using the net international visitor data by day (i.e., how many visitors are in New Zealand each day taking into consideration arrivals and departures), international ticket sales by match and the historic visitor spend by RTO in July and August reweighted using the split of US and other international visitors.

The analysis was conducted from Thursday 13<sup>th</sup> July to Thursday 17<sup>th</sup> August and split over nine (9) four-day blocks.

The graphic depicts the maximum number of international visitors in the RTO over each of the four-day blocks as well as key dates, matches and projected international match attendees in each of the host city.

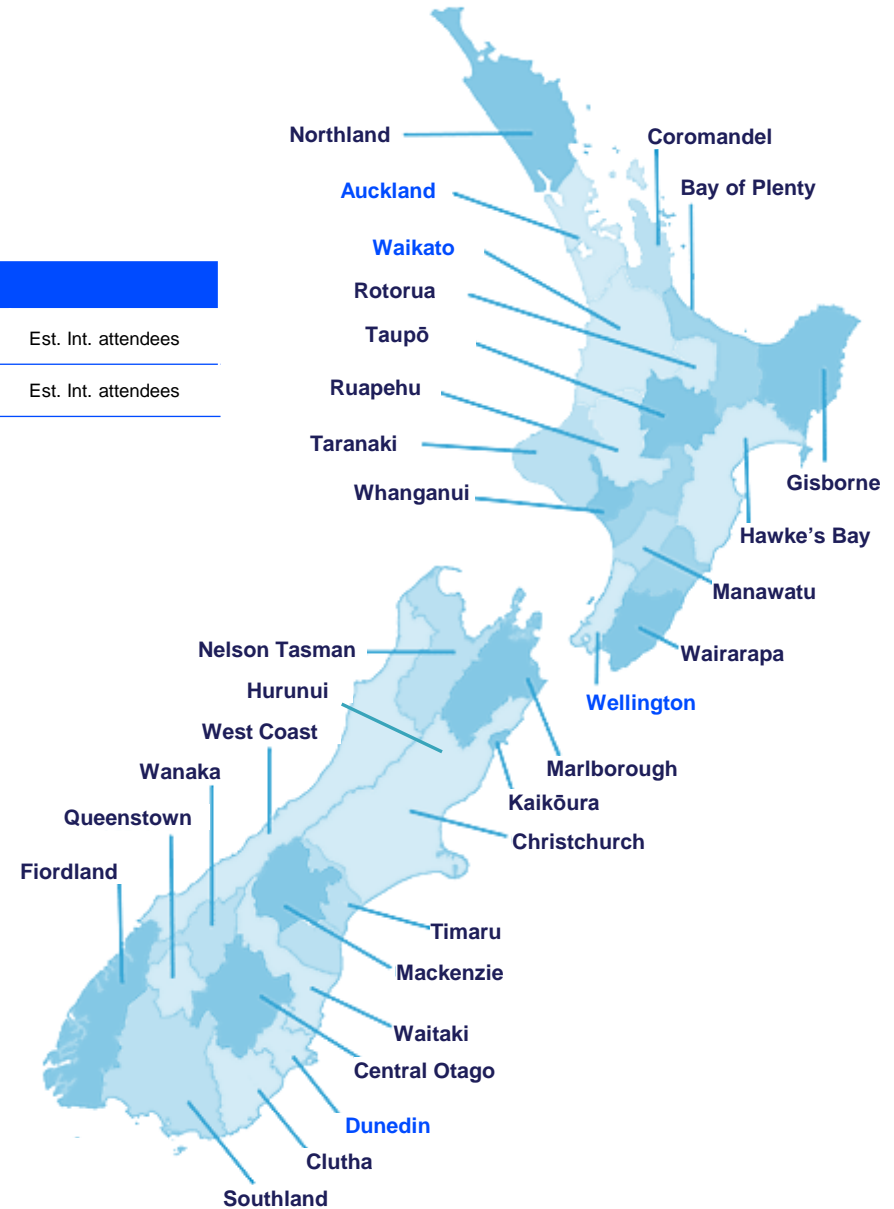
### Legend



### Host City

Key date 1	Match 1	Est. Int. attendees
Key date 2	Match 2	Est. Int. attendees

- X Host City
- X Non-Host City



# 13<sup>th</sup> July – 16<sup>th</sup> July 2023

It is projected that 4,632 international visitors would have arrived in New Zealand by the 16<sup>th</sup> July 2023 for the FWWC 2023.

With Auckland being the only entry port for all long-haul flights (i.e., outside of Australia and Pacific Islands), the majority of visitors will arrive in Auckland before dispersing across the country prior to the first match being played.

**Auckland**  
No matches

**Hamilton**  
No matches





# 17<sup>th</sup> July – 20<sup>th</sup> July 2023

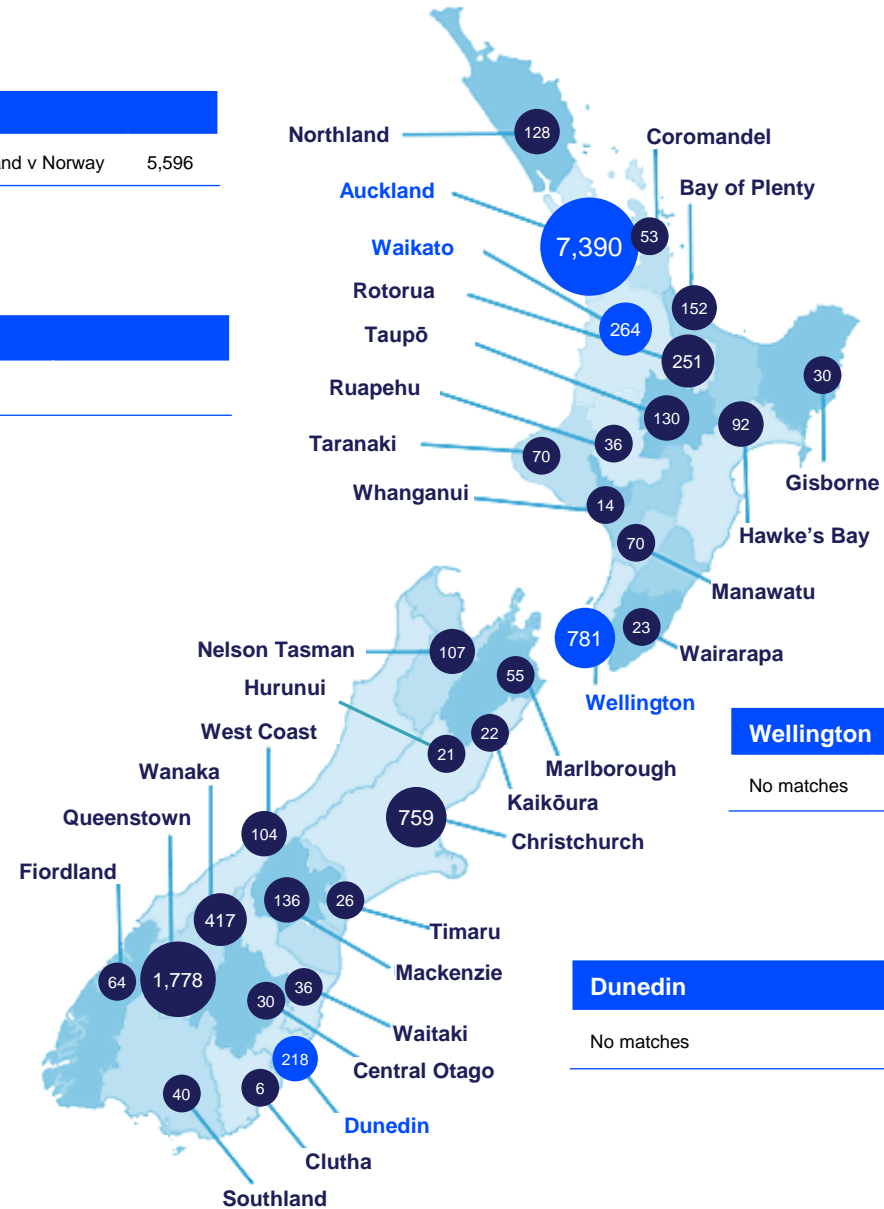
It is projected that 10,694 international visitors would have arrived in New Zealand by the 20<sup>th</sup> July 2023 for the FWWC 2023.

With the opening match played between New Zealand and Norway on the 20<sup>th</sup> July, it is expected that 7,390, or 69% of all international visitors will be in Auckland, however only 5,596 will attend the match.

1,778 international visitors will be in Queenstown, while Wellington and Christchurch and will see 781 and 759 international visitors during this four-day block.

Auckland		
20 <sup>th</sup> July	New Zealand v Norway	5,596

Hamilton		
No matches		



Wellington		
No matches		

Dunedin		
No matches		

## 21<sup>st</sup> July – 24<sup>th</sup> July 2023

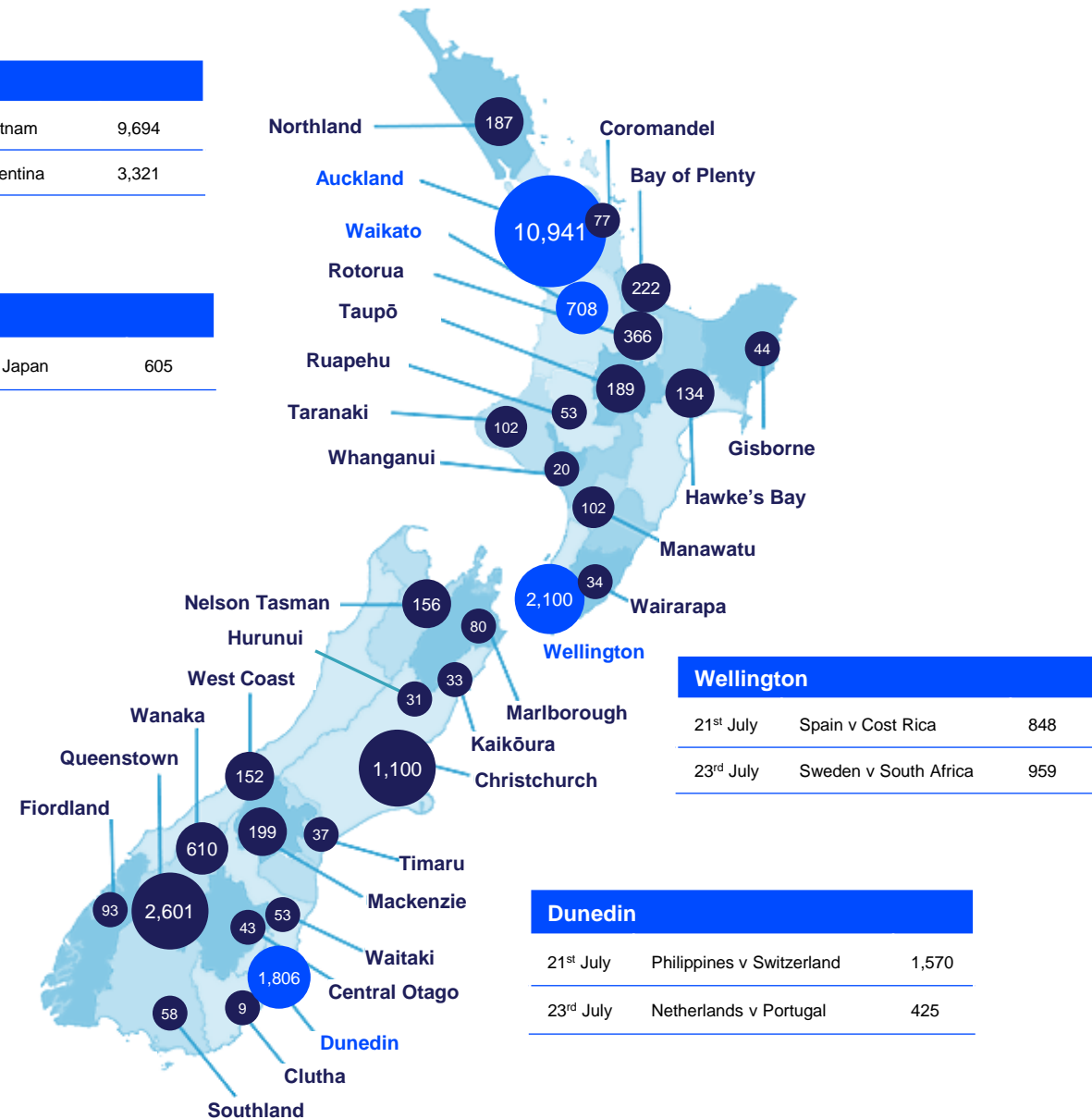
It is projected that 16,438 international visitors would have arrived in New Zealand by the 24<sup>th</sup> July 2023 for the FWWC 2023.

With the first of the US matches (USA v Vietnam) played in Auckland on the 22<sup>nd</sup> July, it is expected that 10,941, or 67% of all international visitors will be in Auckland, with the majority attending the match.

After this match, fans will continue to disperse across the country. By hosting their first two matches, Wellington and Dunedin will start to see dispersion of fans (2,100 and 1,806 respectively) during this four-day block.

Auckland		
22 <sup>nd</sup> July	USA v Vietnam	9,694
24 <sup>th</sup> July	Italy v Argentina	3,321

Hamilton		
22 <sup>nd</sup> July	Zambia v Japan	605



## 25<sup>th</sup> July – 28<sup>th</sup> July 2023

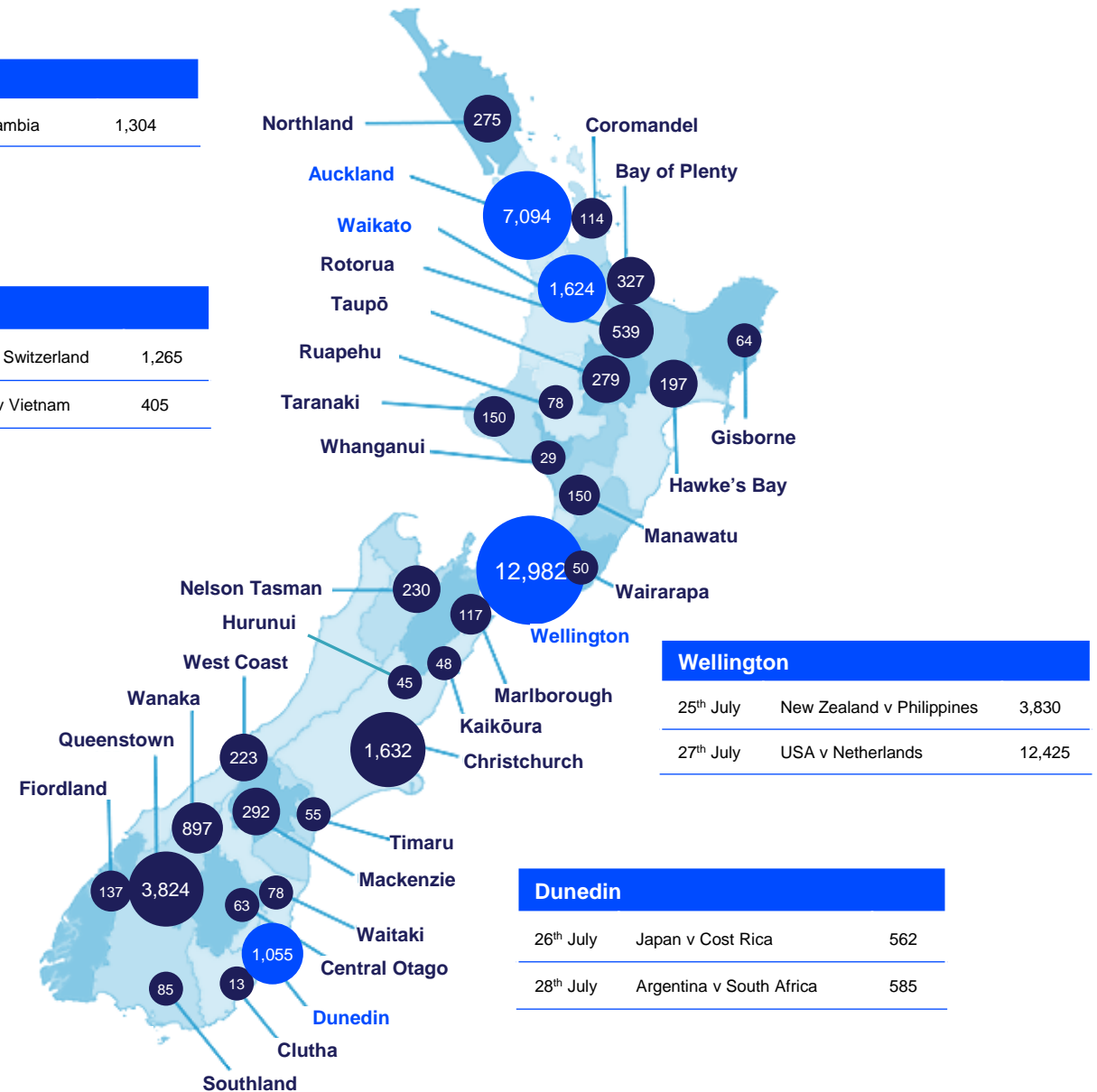
It is projected that 20,196 international visitors would have arrived in New Zealand by the 28<sup>th</sup> July 2023 for the FWWC 2023.

It is projected that a large contingent of international visitors will travel from Auckland to Wellington prior to the United States second group match on the 27<sup>th</sup> July. Airline data suggests that most will arrive the day before the match, with the majority expected to leave Wellington the day after.

Hamilton will also experience its first influx of travellers (1,624) for the Norway v Switzerland match on the 25<sup>th</sup> July. This is potentially made up of day trips from Auckland and overnight stays.

Auckland		
26 <sup>th</sup> July	Spain v Zambia	1,304

Hamilton		
25 <sup>th</sup> July	Norway v Switzerland	1,265
27 <sup>th</sup> July	Portugal v Vietnam	405



## 29<sup>th</sup> July – 1<sup>st</sup> August 2023

It is projected that a peak of 22,167 international visitors are in New Zealand for FWWC 2023 by the 31<sup>st</sup> July 2023, prior to the first departures.

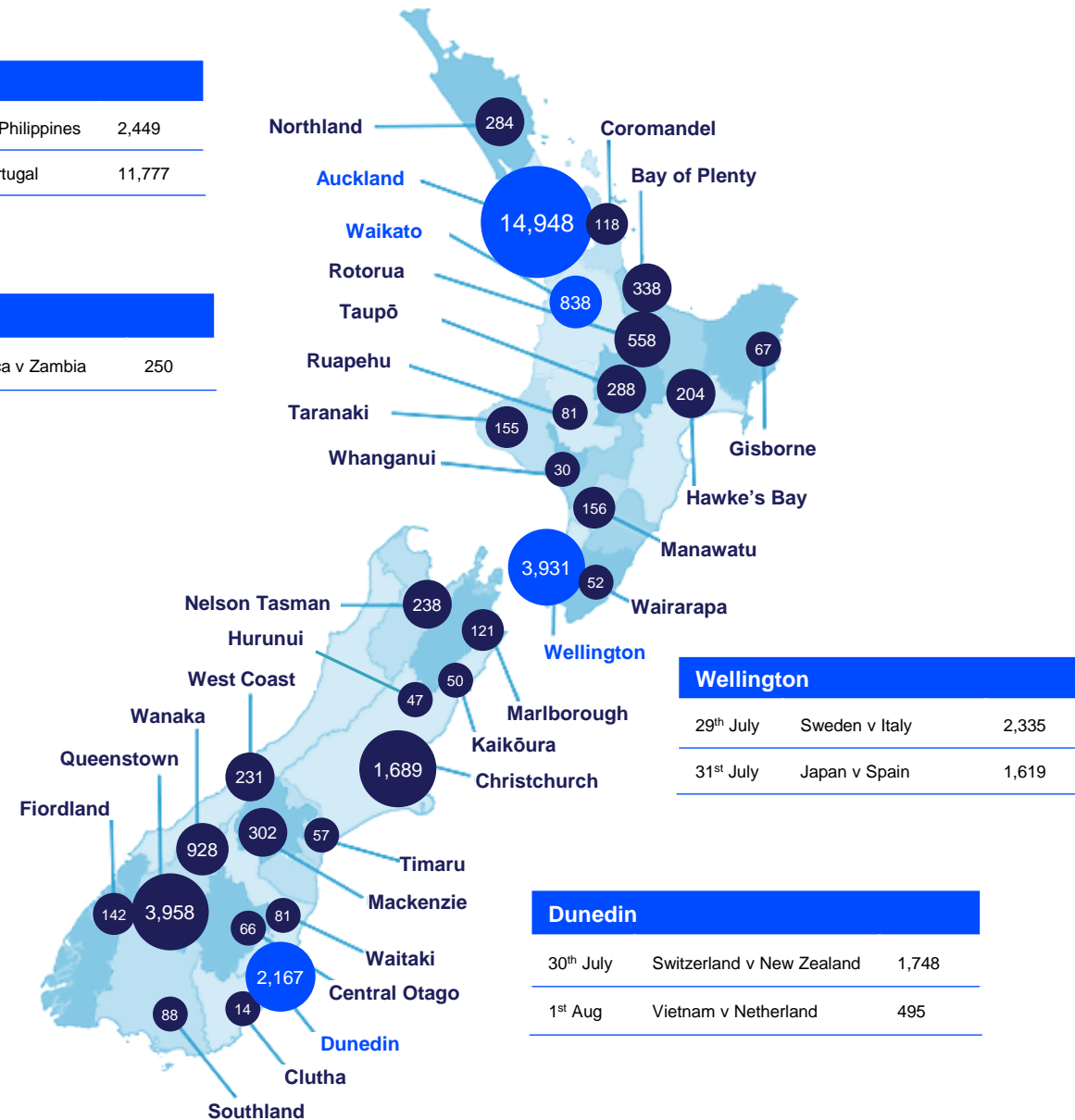
It is projected that the majority of these visitors will descend on Auckland (mostly from Wellington) for the United States final group match on the 1<sup>st</sup> August.

Although a large proportion of internationals would have left Wellington after the United States second match, there is still expected to be 3,931 international visitors in the city mostly attending the Sweden v Italy match on the 29<sup>th</sup> July and Japan v Spain two days later.

Dunedin will experience its biggest influx (2,167) of international (and no doubt domestic) visitors for New Zealand's final group match versus Switzerland on the 30<sup>th</sup> July.

Auckland		
30 <sup>th</sup> July	Norway v Philippines	2,449
1 <sup>st</sup> Aug	USA v Portugal	11,777

Hamilton		
31 <sup>st</sup> July	Costa Rica v Zambia	250



## 2<sup>nd</sup> August – 5<sup>th</sup> August 2023

It is projected that 4,900 FWWC 2023 visitors will have departed New Zealand after the completion of the Group Stage, with 17,743 visitors remaining by the 5<sup>th</sup> August.

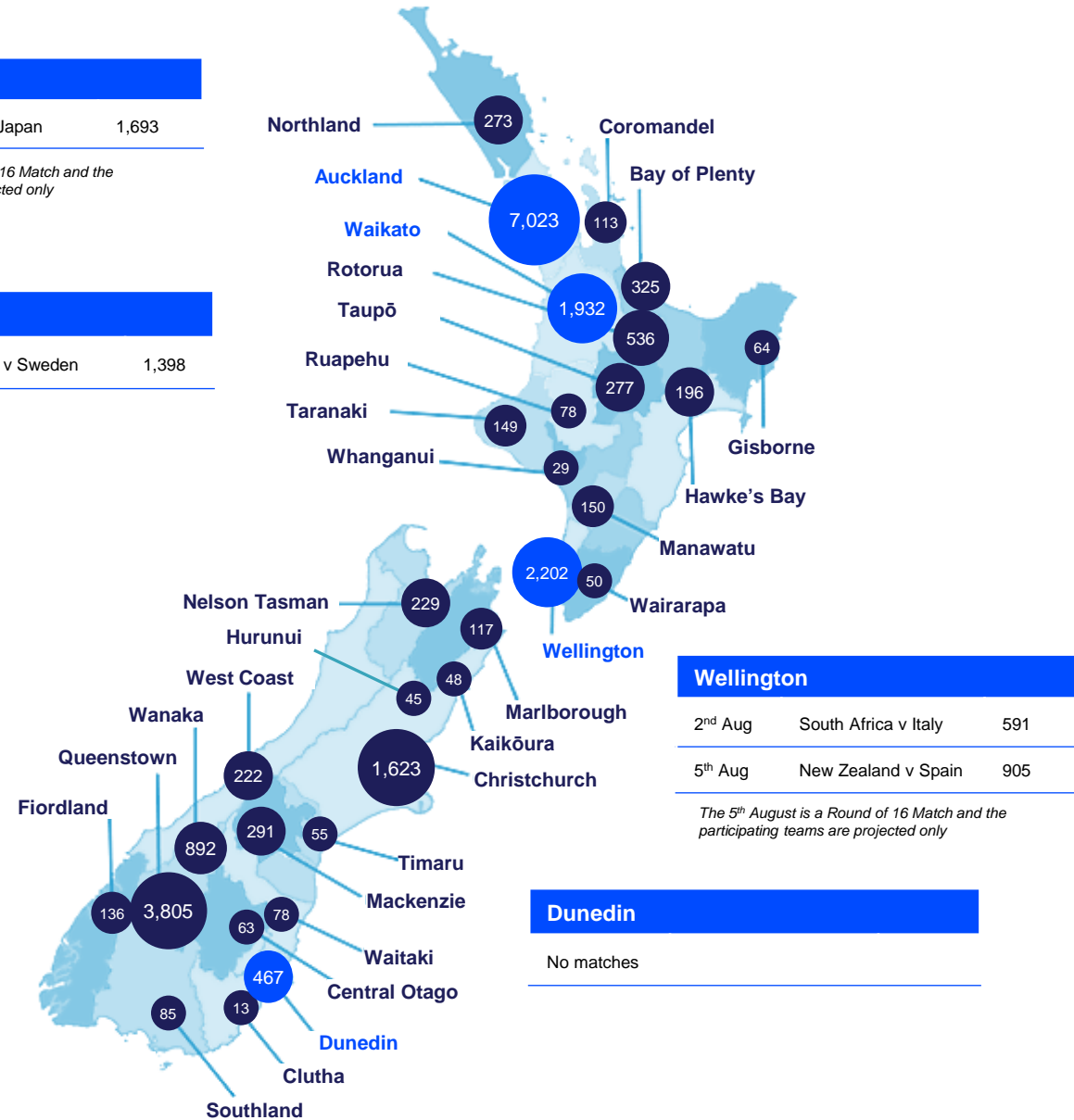
Despite this, Hamilton will experience its biggest influx (1,931) of international visitors for their final match of the tournament, Argentina versus Sweden on the 2<sup>nd</sup> August.

The majority of departures will impact the other host cities in Auckland (7,023), Wellington (2,202) and Dunedin (467) with visitation remaining consistent across the other non-host RTOs.

Auckland		
5 <sup>th</sup> Aug	Norway v Japan	1,693

*The 5<sup>th</sup> August is a Round of 16 Match and the participating teams are projected only*

Hamilton		
2 <sup>nd</sup> Aug	Argentina v Sweden	1,398



# 6<sup>th</sup> August – 9<sup>th</sup> August 2023

It is projected that 14,032 international visitors would still remain in New Zealand by the 9<sup>th</sup> August 2023 for the FWWC 2023.

With no matches being played within this four-day block, all RTOs will experience a decrease in visitor numbers.

**Auckland**  
No matches

**Hamilton**  
No matches



**Wellington**  
No matches

**Dunedin**  
No matches

# 10<sup>th</sup> August – 13<sup>th</sup> August 2023

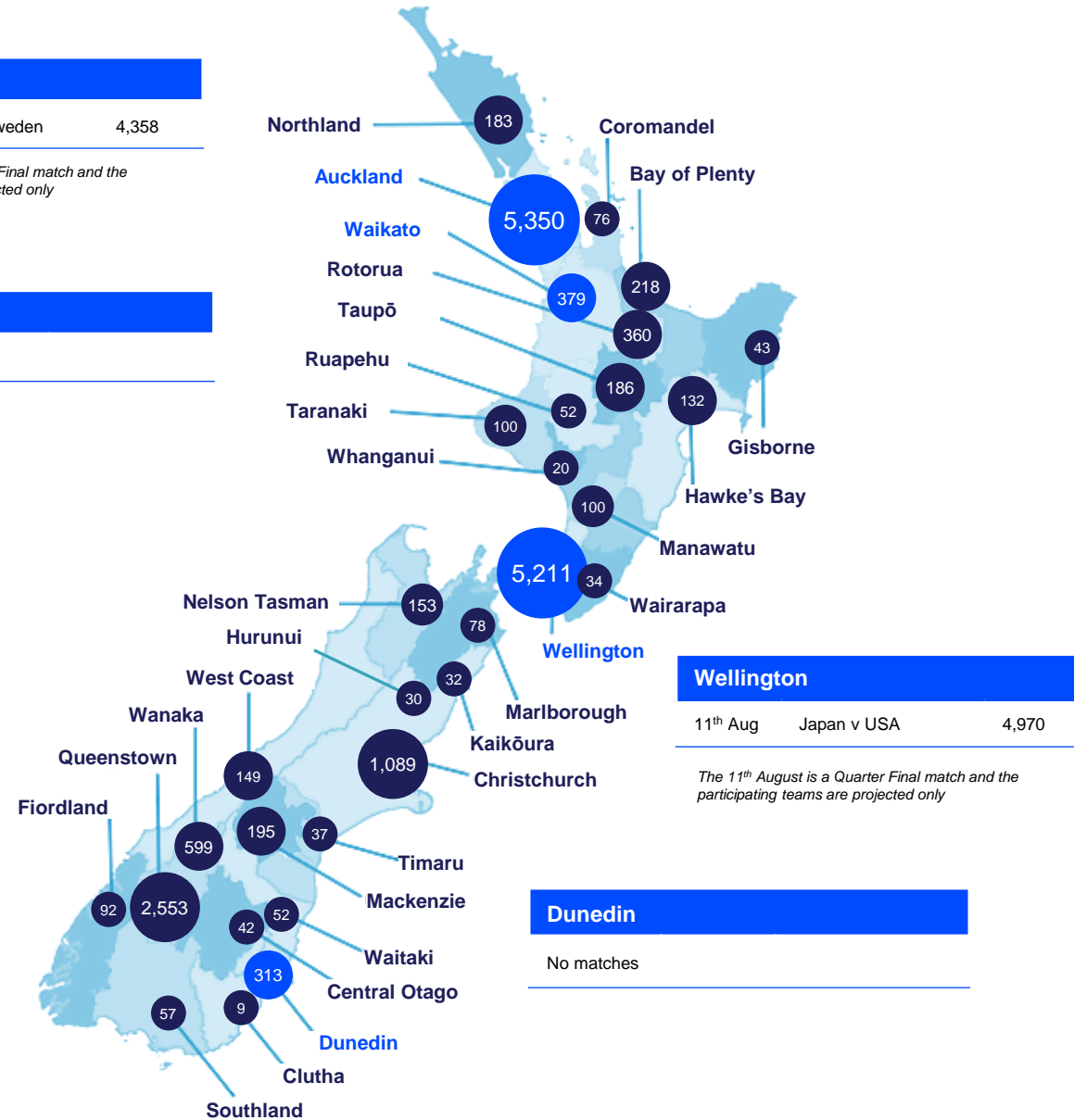
It is projected that 10,264 international visitors will be in New Zealand for FWWC 2023 by the 13<sup>th</sup> August 2023.

It is projected that the majority of these visitors will descend on Auckland (5,350) and Wellington (5,211) for the quarter final matches, with the remaining visitors dispersed across the country.

Auckland		
11 <sup>th</sup> Aug	Spain v Sweden	4,358

*The 11<sup>th</sup> August is a Quarter Final match and the participating teams are projected only*

Hamilton		
No matches		



# 14<sup>th</sup> August – 17<sup>th</sup> August 2023

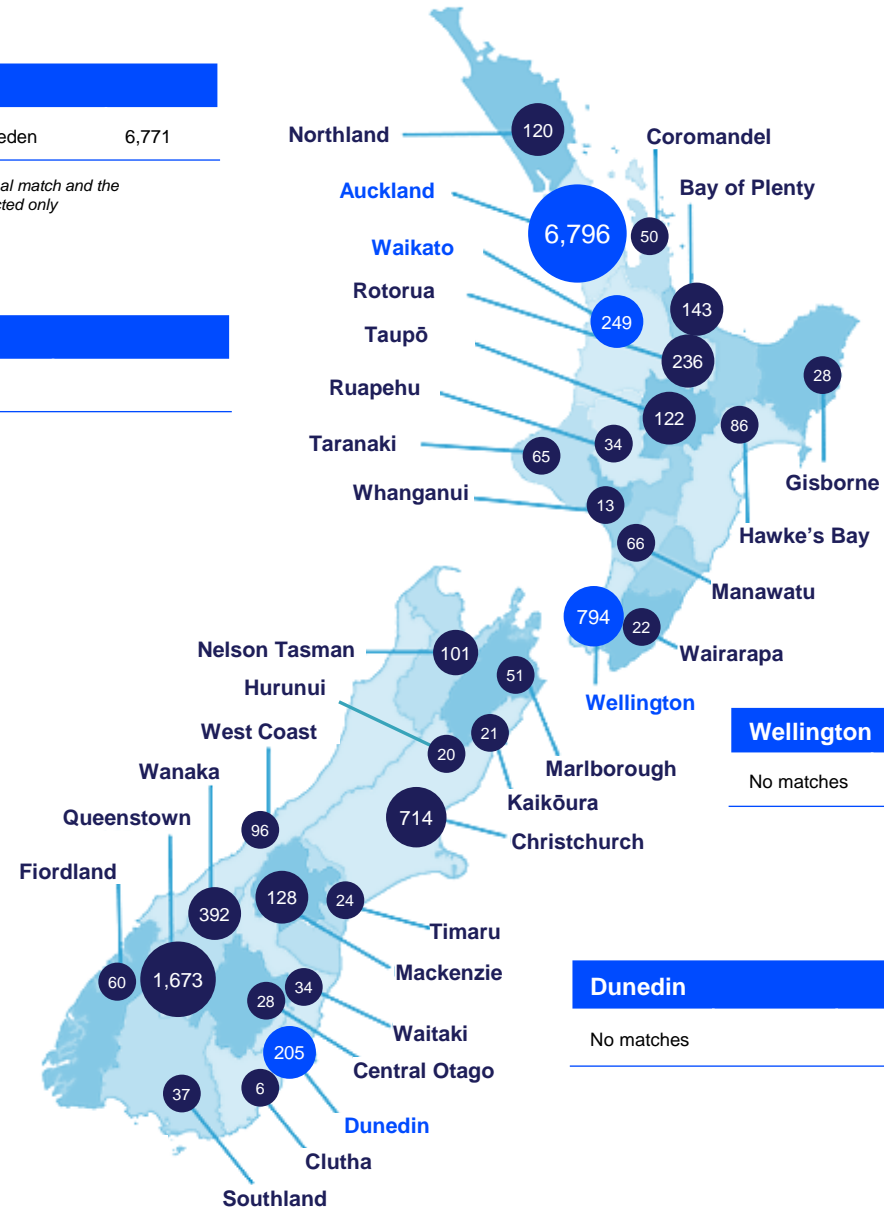
It is projected that all remaining 4,789 international visitors will depart New Zealand by the 18<sup>th</sup> August 2023, following New Zealand's the final match of the tournament, a semi-final match on the 15<sup>th</sup> August.

It is projected that the majority of the remaining visitors will descend on Auckland (mostly from Wellington) for this final match.

Auckland		
15 <sup>th</sup> Aug	USA v Sweden	6,771

*The 15<sup>th</sup> August is a Semi Final match and the participating teams are projected only*

Hamilton		
No matches		



Wellington		
No matches		

Dunedin		
No matches		



## Section 6

# Potential Capacity Issues



# Identified Capacity Issues

Based on the projected international visitation and dispersion of 23,000 spectators across 36 days of the tournament (including a few days pre and post tournament), there is only one potential capacity issue identified.

Wellington is hosting New Zealand vs Philippines on the 25<sup>th</sup> July followed by the United States second group match versus Netherlands on the 27<sup>th</sup> July.

It is projected that the majority of United States fans will travel to Wellington, mostly the day of or the day before the match creating a potential accommodation issue.

However, hotel data 6 weeks out from the tournament suggests there is still unutilised capacity in Wellington’s hotels and other available accommodation, and insights from AirBnB suggest listings are strong and likely to further increase closer to the tournament start to meet any unmatched demand.



Maximum number of international FWWC 2023 visitors during each four-day block

RTO	13th July - 16th July	17th July - 20th July	21st July - 24th July	25th July - 28th July	29th July - 1st Aug	2nd Aug - 5th Aug	6th Aug - 9th Aug	10th Aug - 13th Aug	14th Aug - 17th Aug
Auckland	1,630	7,390	10,941	7,094	14,948	7,023	5,933	5,350	6,796
Wellington	397	781	2,100	12,982	3,931	2,202	1,443	5,211	734
Waikato	134	264	708	1,624	838	1,932	488	379	249
Dunedin	111	218	1,806	1,055	2,167	467	404	313	205
Queenstown	903	1,778	2,601	3,824	3,958	3,805	3,287	2,553	1,673
Christchurch	385	759	1,110	1,632	1,689	1,623	1,403	1,089	714
Wanaka	212	417	610	897	928	892	771	599	392
Rotorua	127	251	366	539	558	536	463	360	236
Bay of Plenty	77	152	222	327	338	325	281	218	143
MacKenzie	69	136	199	292	302	291	251	195	128
Taupō	66	130	189	279	288	277	239	186	122
Northland	65	128	187	275	284	273	236	183	120
West Coast	53	104	152	223	231	222	192	149	98
Hawke’s Bay	47	92	134	197	204	196	170	132	86
Nelson-Tasman	54	107	156	230	238	229	198	153	101
Manawatu	36	70	102	150	156	150	129	100	66
Taranaki	35	70	102	150	155	149	129	100	65
Fiordland	32	64	93	137	142	136	118	92	60
Southland	20	40	58	85	88	85	73	57	37
Marlborough	28	55	80	117	121	117	101	78	51
Ruapehu	18	36	53	78	81	78	67	52	34
Coromandel	27	53	77	114	118	113	98	76	50
Waitaki	19	36	53	78	81	78	67	52	34
Central Otago	15	30	43	63	66	63	55	42	28
Gisborne	15	30	44	64	67	64	55	43	28
Timaru	13	26	37	55	57	55	47	37	24
Wairarapa	12	23	34	50	52	50	43	34	22
Kaikōura	11	22	33	48	50	48	41	32	21
Hurunui	11	21	31	45	47	45	39	30	20
Whanganui	7	14	20	29	30	29	25	20	13
Clutha	3	6	9	13	14	13	11	9	6



## Contact Details

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## About MI Global Partners

Over the past 22 years, MI Global Partners has been leading and partnering to deliver the world's best events, sports and place projects.

As a purpose-led company, MIGP's suite of sustainability services guide clients through a co-created sustainability journey with strong engagement, innovation, and with strategic, operational and commercial integration.

Our experience has given us the insights and unique capacity to understand the full project lifecycle – from Inception to Celebration.

We are major event specialists. We have been involved in every Summer Olympic Games since Sydney 2000 and every Rugby World Cup since 2003. Our event services include event strategy, feasibility, bidding, operational delivery and post-event evaluation.

Sport is our passion. We have assisted major sporting codes around the globe with the development of strategic projects from competition expansion and facilities planning to growth, community impact, policy development and governance.

Place is at the heart of what we do. We have created and delivered iconic place projects across Sport, Arts and Culture. Our skills include strategy, feasibility, business case development, project delivery support and post project evaluation.

As a business we strive to shape and advance the world of event, sport and place delivery. We are committed to doing what it takes to deliver the very best for our clients and their project outcomes for today and into the future.