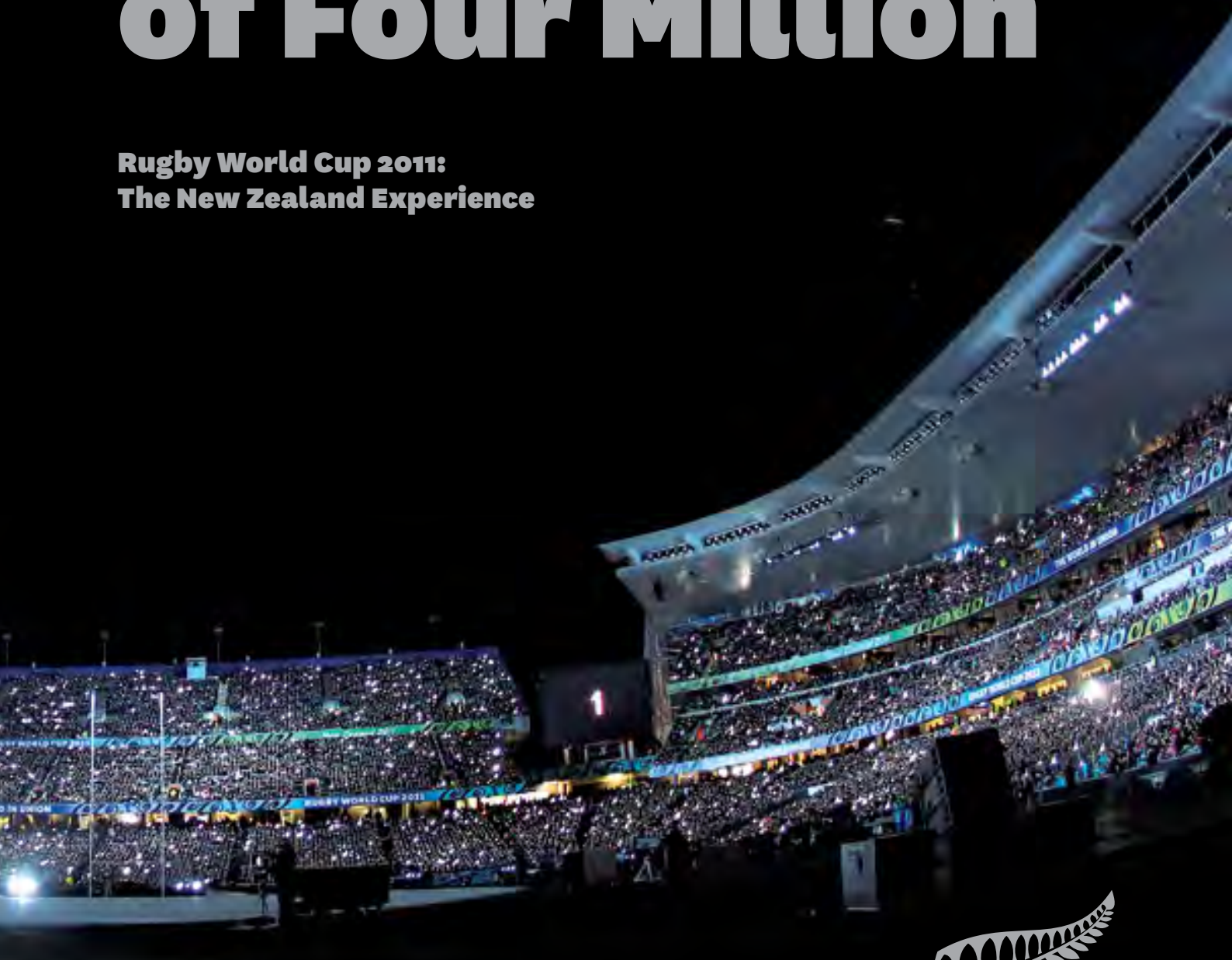


The Stadium of Four Million

**Rugby World Cup 2011:
The New Zealand Experience**



**NEW ZEALAND
2011**

About this report

Every four years, the Rugby World Cup is hosted by a nation with a passion for the sport. As part of New Zealand's hosting of the 2011 tournament, it committed to showing how the event unfolded.

The Stadium of Four Million documents New Zealand's journey from the bargaining table with the International Rugby Board to the cheers that erupted when the final whistle blew.

Acknowledgements

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Welcome...



For New Zealand, the 2011 Rugby World Cup exceeded all expectations. Both on and off the field, the tournament was a resounding success.

Over 45 days, at 48 matches, in 12 venues, the eyes of the sporting world were firmly fixed on New Zealand. And our stadium of four million did not disappoint.

As the host nation, New Zealand had a lot to gain. More than 130,000 visitors from over 100 countries came to take part - far exceeding predicted numbers. As a result, we saw a marked boost in economic activity that's had long-lasting and very positive effects on our regions.

During the tournament, New Zealanders up and down the country opened their doors and invited the world to come on in. Alongside the official match schedule, the REAL New Zealand festival also saw our communities 'adopting' teams to give them a truly Kiwi experience, while our largest cities embraced their visitors and showed off the best we had to offer.

Brand New Zealand has never been in better shape, with the country getting unprecedented exposure to the world's media. Our outstanding scenery, unique culture, delicious wine and food, and thrilling activities have helped cement our place as an international tourist destination. We're still seeing spin-off benefits for our tourism industry and we expect this momentum to continue.

And, as a nation, our sense of pride in our country and what we are capable of achieving received a tremendous boost from the celebrations. Here at home the Rugby World Cup will be remembered for instilling pride in our country like never before.

I'm extremely proud of the way New Zealand embraced the tournament. And I'm equally proud of the All Blacks and their efforts on the field to take the Cup - I couldn't think of a better way to end this magnificent event.

Rt Hon John Key
Prime Minister
Minister of Tourism



PART A:

Keeping Score

Introduction

A defining moment

23 October 2011. The Rugby World Cup final. It was an epic moment when, after an intense match with France that had millions of viewers around the world on the edge of their seats, the All Blacks emerged victorious.

Kiwis throughout the country - the crowd that formed the 'stadium of four million' - were jubilant. It was the biggest sporting event in New Zealand's history and it meant the world to them.

New Zealanders might have taken home the Webb Ellis Cup, but the long-term benefits of hosting the tournament are likely to be more significant.

The Rugby World Cup exposed New Zealand to the world, helped create better stadiums and roads, improved tourist infrastructure, forged new business links, enhanced community pride and strengthened the volunteer network for future events.

The tournament also gave thousands of visitors to the country an experience they will never forget. Kiwis opened their homes and hearts, providing a greeting unprecedented in Rugby World Cup history and unlikely to be replicated in any other country.

20 teams

48 matches

12 venues

45 days

133,000+ international visitors¹

¹ This is Statistics New Zealand estimate of overseas Rugby World Cup visitor arrivals. Other estimates suggest visitor arrivals could have been as high as 157,750.



Sir Colin Meads

Winning the hosting rights

New Zealand based its bid to host the 2011 Rugby World Cup (RWC) on the concept of a stadium of four million people. This was built on the premise that every New Zealander would participate in its success.

New Zealand's proposal also promised fans, officials and participants an unforgettable rugby experience in a country known for its hospitality, creativity and passion for rugby.

The bid to the International Rugby Board (IRB) in Dublin in 2005 was led by the New Zealand Rugby Union (NZRU) with support from the New Zealand Government.

A dynamic team of influential New Zealanders was assembled to present to the IRB. It comprised the Rugby Union Chairman and Chief Executive, All Blacks Captain (at the time) Tana Umaga, All Blacks legend Sir Colin Meads and the Prime Minister. It was the first time a head of government had ever presented to the IRB.

However, perhaps the most persuasive component of the presentation came from Sir Colin Meads, who told them:

In the rugby world, there is simply no place like New Zealand. No greater country to tour, no better place to hold the Rugby World Cup. I know that people think we don't have the venues but I tell them New Zealand is one big rugby stadium and it's got four million people in it.

The government's objectives

The New Zealand Government recognised that the RWC would generate many economic, cultural and social benefits. Accordingly, it provided significant financial backing to ensure the tournament's success.

The government had two clear objectives:

- to support a successful tournament through appropriate organisation, engagement and funding, and by ensuring that key facilities, such as venues, were ready
- to maximise the opportunities and ensure enduring benefits for New Zealand.



Tana Umaga



New Zealand's RWC Bid Team (L-R, Sir Colin Meads, Tana Umaga, Rt Hon Helen Clark, Jock Hobbs and Chris Moller celebrating the announcement by the IRB in Dublin in 2005.



IRB Chairman Syd Miller announces that New Zealand will be the hosts of Rugby World Cup 2011, watched by New Zealand's Jock Hobbs.



Making it all happen

As with any major event, the preparations started early.

When the hosting rights were awarded in 2005, new organisational structures had to be created to tackle the wide range of tasks involved. Sporting bodies and rugby heroes, businesses, local communities, Māori and Pacific peoples, and the public service were engaged to help, and a range of programmes and campaigns were set up to deliver the experience.

The key organisations created for the event

Rugby New Zealand 2011 Limited

Rugby New Zealand 2011 Limited (RNZ 2011) was established in 2006 as a joint venture between the New Zealand Rugby Union and the government. It was charged with planning and delivering the Rugby World Cup and meeting the obligations of the Host Union Agreement, which was made between the International Rugby Board and the New Zealand Rugby Union.

These obligations included supporting the rugby teams (such as with travel, accommodation and catering), developing a VIP programme, providing match and training venues to a standard beyond that typically seen in New Zealand, and supporting media and fans in and around venues.

To deliver on the promise of a stadium of four million, the matches were spread across New Zealand instead of just concentrating on the main centres. This decision could have reduced potential revenues but it was considered essential to engage the whole country.

“People think we don't have the venues but I tell them New Zealand is one big rugby stadium and it's got four million people in it.” – Sir Colin Meads

More than 35 government agencies had to work closely on issues such as border control, transport, public order and security, VIP hosting, trade and tourism.



RNZ 2011 and its regional partners were responsible for delivering over 1.35 million seats at tournament matches, booking almost 60,000 room nights at 125 properties around New Zealand, and providing nearly 1.4 million meals for teams, VIPs, workers, media and ticket holders throughout the tournament.

Early in the planning phases, RNZ 2011 signed agreements with the regions that were hosting matches and/or teams. These towns and cities acted as bases for teams, visitors and media. Regions formed coordination groups comprising local government, venues, provincial rugby unions and other community bodies. RNZ 2011 worked closely with each region to ensure consistent standards and set up a tournament information system that connected all venues to media and broadcasters.

The coordination office

Due to the complex nature of the event, more than 35 government agencies had to work closely on issues such as border control, transport, public order and security, VIP hosting, trade and tourism. This work was coordinated by a dedicated RWC office, which was established in 2007 within the Ministry of Economic Development.

The goal of the coordination office was to deliver seamless support and services by sharing expertise, resources and information. It coordinated core government services related to the RWC, monitored government investment (particularly stadia) and developed communications and marketing materials. It also administered event-related legislation² to control ambush marketing, a term used to describe businesses which associate themselves with an event without the consent of the event organiser.

NZ 2011 Office

The NZ 2011 Office was established to deliver some of the programmes and campaigns associated with the Rugby World Cup.

The NZ 2011 Office recognised that the 'stadium of four million' concept would mean finding a way to engage all New Zealanders, not just those interested in rugby. As part of realising that goal, the office organised the nationwide REAL NZ Festival and a business engagement programme, which included the NZ 2011 Business Club and the REAL Sector Showcase. It also supported the business and festival activities at Queens Wharf, including the Cloud - Auckland's specially-developed promotional venue. More details about these programmes and activities are provided in the following sections.

² The Major Events Management Act 2007 was passed to control ambush marketing and ensure that the country was able to deliver the RWC 2011.



THE TOURNAMENT GAVE THOUSANDS OF VISITORS TO THE COUNTRY AN EXPERIENCE THEY WILL NEVER FORGET.

To boost the workforce, an army of volunteers needed to be recruited.



The programmes and campaigns

Volunteer programme

To boost the workforce, an army of volunteers needed to be recruited. The government contributed NZ\$6 million of the NZ\$8.4 million required to develop and run the volunteer programme. The programme included hosts at key sites to enhance visitors' experience. See page 41 for more information.

REAL New Zealand Festival

The REAL New Zealand Festival celebrated New Zealand and its people – the arts, culture, heritage, sport, food and wine, stories, landscapes and industries. As part of the festival, 1,236 events across these diverse genres were staged throughout the country.

Key to the festival's success was its connection to the tournament. It was important that the festival and the tournament be seen by visitors and New Zealanders as two sides of same experience. See page 60 for more information.

Community engagement programme

The NZ 2011 Office worked with many local government authorities and community organisations to engage communities in the tournament. Their message was simple: get involved in the RWC and give guests a warm welcome and an experience they will never forget.

The NZ 2011 Office developed programmes to make it easy for schools, businesses and communities to get involved and become part of the nation of four million hosts. Initiatives included an education programme for all primary and intermediate students, free training for staff in hotels and restaurants, and a range of other activities, such as bunting sales, the Adopt a Second Team programme and the Best-dressed Street competition. See page 59 for more information.



Business engagement programme

Amongst the 133,000 international visitors were many business people, media and other distinguished visitors. A particular focus was given to organising events to showcase New Zealand businesses and help them make connections with these visitors.

In addition to the REAL New Zealand Showcase and the NZ 2011 Business Club (both detailed below), the business engagement programme also included the NZ 2011 Ambassadors programme, which used ex-All Blacks to promote trade and tourism; an international business media programme; and a commercial VIP programme. See page 82 for more information.

REAL New Zealand Showcase

The REAL New Zealand Showcase highlighted the best of New Zealand business and industry. Events were staged to demonstrate New Zealand's capabilities, creativity and innovation to a broad audience. The focus was on areas where New Zealand has a unique offering to promote to the world. These included agritech (agricultural technology), film production, yacht-building, forestry, food and wine.

The REAL New Zealand Showcase provided a nationwide platform for business connections during the tournament. It targeted 16 sectors and staged over 200 events. See page 83 for more information.

NZ 2011 Business Club

The NZ 2011 Office developed a business club to facilitate networking during the tournament. Using an online platform, New Zealand businesses were able to identify other business people who might have similar interests to host at various events. See page 86 for more information.

Event centres and fan-zones

Fan-zones formed an important part of the Rugby World Cup. They provided a place for fans to meet as well as watch matches on outdoor screens. All New Zealand cities and towns hosting RWC matches had fan-zones.

Queens Wharf and the Cloud

In Auckland, the government and local government bought Queens Wharf – an attractive waterfront site adjacent to the central business district – to provide a focal point for the Rugby World Cup celebrations. It was purchased from Ports of Auckland for NZ\$40 million.

Queens Wharf was a major drawcard for fans in Auckland. It became the country's biggest fan-zone, holding up to 10,000 people at a time. It was also home to the Cloud, a purpose-built events venue. See page 30 for more information.

Māori partnership initiatives

Māori culture, business, communities and people were an intrinsic part of the tournament – from the opening to the closing ceremony. Visitors were welcomed onto marae (traditional Māori meeting places), Māori cultural events were staged, matches were aired on Māori television, and Māori wardens provided security at games. These events helped provide an experience that visitors will never forget. See page 54 for more information.

“Fan-zones formed an important part of the Rugby World Cup. They provided a place for fans to meet as well as watch matches on outdoor screens.”



Highlights from the Rugby World Cup

About this summary report

KPMG was commissioned by the Ministry of Economic Development to provide an independent analysis of the impact of the 2011 Rugby World Cup (RWC) on New Zealand. This summary report sets out KPMG's key findings.

The event in a nutshell

On Sunday 23 October 2011, an estimated 41.8 million people – including more than 61,000 spectators – watched the All Blacks win the 2011 Rugby World Cup.³

The match was the culmination of a six year period between the decision to bid for the hosting rights and the actual event.

The RWC was an exceptional tournament in many ways. It received an unprecedented level of government support, and it had a unique concept: the 'stadium of four million'.

The results

- The vision of a **stadium of four million** was realised.
- **Over 133,000 international visitors** travelled to New Zealand for the event.
- The tournament was an operational and sporting success that either **met or exceeded the expectations** of the international rugby community, media and sponsors.
- There was **widespread and enthusiastic support throughout the country**, not just in locations where matches were held.
- **Local pride and national unity increased**, despite the difficult economic environment and the significant impact of the Canterbury earthquakes.
- The activity during and leading up to the tournament provided a **tangible stimulus to the New Zealand economy**.
- The **enduring benefits** for the country include positive visitor experiences, new connections, new major event capability, infrastructure developments and an increased interest in volunteering.

³ Viewing figures from the International Rugby Board *Rugby World Cup 2011 Broadcast and Distribution Report*. p. 8.

Attendance

The consistently high attendances at the rugby matches demonstrated the tournament's success.

There were approximately 1.48 million match-day attendances. Stadium capacity utilisation across the entire tournament reached 94 percent, and three-quarters of all games had 88 percent or higher capacity utilisation.⁴

Twenty-two percent of tickets sold by Rugby New Zealand 2011 Ltd (RNZ 2011) were purchased internationally. The Ireland vs. Wales quarter-final had the highest proportion of international ticket sales (39 percent) followed by the South Africa vs. Australia quarter-final (38 percent).

According to Statistics New Zealand, an estimated 133,200⁵ visitors from more than 100 countries attended the RWC. These results exceeded pre-tournament forecasts, which estimated between 71,000 and 85,000 visitors would attend.⁶

While nearly 42 percent of international arrivals during the tournament were Australian residents, only 63 percent of those were Australian citizens, with the remainder being mostly New Zealand, UK, Irish, South African and French citizens. More than 38,000 visitors arrived from Europe, which exceeded pre-tournament forecasts of 30,000.⁷

In the Ministry of Economic Development's International Visitor Survey (IVS), 87 percent of respondents who travelled specifically for the RWC came from countries that had teams playing in the tournament.

Figure 1: International attendance by country of residence

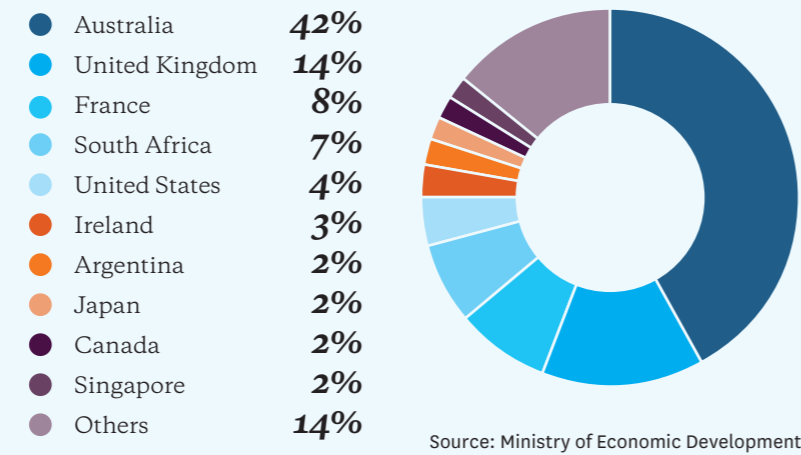
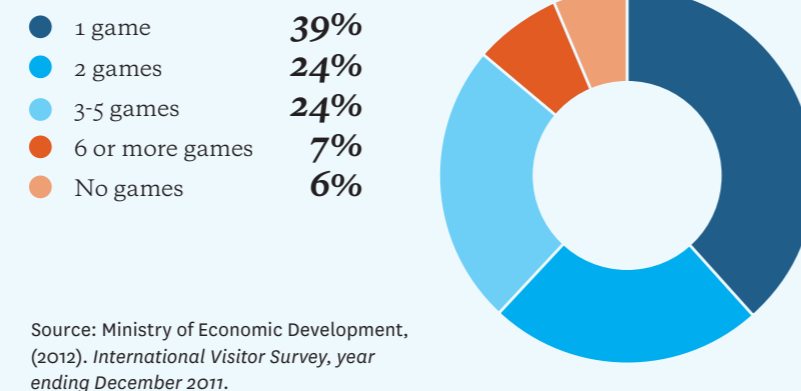


Figure 2: Number of games attended by international visitors travelling for the RWC



Analysis of arrival and departure information indicates that visitors from participant countries stayed an average of 13 days, ranging from an average of six days for Namibian visitors to 38 days for visitors from Wales. Two percent of visitors who came for other reasons also attended a game.⁸

Overall, attendance at the RWC 2011 compared favourably against previous tournaments on a range of measures.

Table 1: Attendance at the Rugby World Cup, 2003-2011

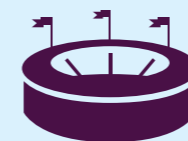
EVENT	INTERNATIONAL ATTENDANCE	CAPACITY UTILISATION	AGGREGATE ATTENDANCE**	LENGTH OF STAY
RWC 2003 in Australia ⁹	65,000	89%	1.8 million	15-36 days depending on country of origin
RWC 2007 in France ¹⁰	Figures unavailable	95%	2.2 million	Figures unavailable
RWC 2011	133,200	94%	1.5 million	6-38 days depending on country of origin

Note: Figures are not directly comparable as they were not calculated according to a consistent methodology.

** Attendance estimates based on ticket sales.

The key themes

Four key themes emerged from the government's objectives¹¹ for the tournament. These themes are discussed in more detail in the following sections of this summary report.



1. Demonstrate major event capability to the world



2. Provide a stimulus to the New Zealand economy in 2010 and 2011



3. Promote Brand New Zealand to the world to achieve tourism and business benefits



4. Build social cohesion by engaging New Zealanders in the event

⁴ RNZ 2011 match attendance data.

⁵ Statistics New Zealand. (2011). *International Travel and Migration: October 2011 Report*. pp. 3-4.

⁶ Horwarth Asia Pacific and Market Economics. (2006). *Estimated Impact of the 2011 Rugby World Cup*.

⁷ Ministry of Economic Development and Tourism New Zealand. (2010). *Preliminary Forecasts of International Visitor Activity in New Zealand during Rugby World Cup 2011*.

⁸ Ministry of Economic Development (2012). *International Visitor Survey, year ending December 2011*.

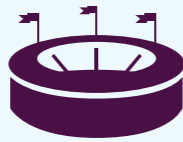


⁹ URS Finance and Economics. (2004). *Economic Impact of the Rugby World Cup 2003 on the Australian Economy - Post Analysis*. pp. ES-3 and 3-12.

¹⁰ Centre de Droit et d'Economie du Sport. (2008). *The Economic Impact and Social Utility of the 2007 Rugby World Cup in France*. p. 11.

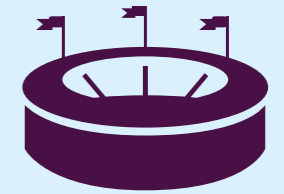
¹¹ Cabinet Business Committee paper, CBC 10 (85) (6 August 2010).

Table 2: The government's programmes and the key themes

This table shows how some of the RWC programmes and campaigns aligned with some of the key themes.

	EVENT CAPABILITY 	BRAND NZ  NEW ZEALAND	SOCIAL COHESION 
Culture and tourism programmes			
Giant rugby ball		✓	
Targeted marketing campaigns		✓	
Ambassador programme		✓	
Business engagement programmes			
REAL New Zealand Showcase		✓	✓
The Cloud at Queens Wharf		✓	✓
NZ 2011 Business Club		✓	
International media and VIP programme	✓	✓	
Promote Auckland		✓	
Community engagement programmes			
Elevating the silver fern as the national emblem		✓	✓
REAL New Zealand Festival	✓	✓	✓
Education programme			✓
Adopt a Second Team			✓
Best-dressed Street			✓
Volunteer programme	✓	✓	✓

Demonstrating major event capability



One of the government's key goals in bidding for the tournament was to demonstrate New Zealand's ability to host major events.

There were two major dimensions to consider. Firstly – and of primary importance to the International Rugby Board (IRB) – was New Zealand's ability to host a commercially successful major event in a global context. Secondly, its ability to deliver an operationally excellent and well-run tournament that would meet the expectations of participants and visiting spectators.

Following the New Zealand Rugby Union's (NZRU) successful bid, some commentators expressed concern that New Zealand's infrastructure would not meet the demands of the tournament.¹²

Key challenges for the government and other participating bodies were:

- providing adequate infrastructure (e.g. stadia, roads, transport links)
- ensuring a smooth administrative pathway for a large number of visitors
- providing sufficient accommodation
- generating sufficient match-day attendance and general support to create a suitable atmosphere
- demonstrating risk management capability.

Commercial results

In March 2012, the IRB announced that the RWC 2011 was the second-highest revenue-earning event in the history of the tournament, with gross commercial revenues of GBP142 million (NZ\$273 million¹³). These revenues were within 3 percent of those achieved for RWC 2007 in France. RWC 2011 also garnered higher broadcast revenues (GBP93 million, equivalent to NZ\$179 million¹⁴) and similar sponsorship revenues. Corporate travel and hospitality were the only areas to show lower commercial revenue than the 2007 Rugby World Cup.

The IRB noted that the 2007 tournament was hosted at the height of the global economic boom, while the RWC 2011 was staged amidst an uncertain economic climate, in a smaller domestic marketplace and in a non-European timezone.

The RWC 2011 demonstrated that major events can be a commercial success in New Zealand and comparable with the results achievable in the larger countries, including those in the northern hemisphere. The 12-hour time difference to the major rugby markets (and other sporting markets) of Europe and Africa does not have to be a barrier to New Zealand hosting major events. The recent announcement that New Zealand will host the World Masters Games in 2017 reinforces this view.

Infrastructure

In most cases, New Zealand successfully provided the necessary infrastructure to host the tournament. Successes include stadia works in Auckland, Dunedin, Whangarei, Taranaki and Nelson, and road infrastructure projects in Auckland and Dunedin.

Transport infrastructure performed very well across the country – despite Auckland suffering major transport problems on opening night as a result of a larger than expected influx of people at the waterfront.

Key transport providers, such as Air New Zealand, implemented back-up plans and ensured maintenance was performed outside the tournament period.

Administration

RNZ 2011 was set up as an independent entity to organise the event. It was jointly owned by the government and NZRU.

There is widespread recognition, including from the IRB, that, in logistical terms, RNZ 2011 delivered the tournament to a very high standard and that New Zealand can be considered a centre of excellence in major event capability.

The government also set up a RWC coordination office to manage administration around the tournament and facilitate interagency projects. This included the creation of the Major Events Border Steering Group. Under the leadership of New Zealand Customs, the key border agencies (Immigration New Zealand, Ministry of Primary Industries, and Aviation Security) set up a process to transfer most teams through the arrivals process in around 20 minutes.¹⁵

¹² See 2009 NZPA article "Accommodation worries for RWC" at www.tvnz.co.nz/travel-news/accommodation-worries-rwc-2841362

¹³ Conversion based on mid-point exchange rate for March 2012.

¹⁴ Ibid.

¹⁵ Ministry of Economic Development, unpublished report. *Delivering the Rugby World Cup*. p. 3.

Accommodation

Overall, New Zealand was able to provide sufficient accommodation for visitors, despite visitor numbers being greater than forecast and the loss of Christchurch accommodation.

Tourism New Zealand identified a pattern towards “free and independent travel”, typified by the widespread use of camper vans, and developed a website to help those visitors.¹⁶

Accommodation providers reported an uneven experience across the country. Auckland providers were full, while other parts of the country were not as occupied as anticipated, particularly in the South Island (such as in Queenstown). This is likely to be because the geographic momentum moved northwards for the knockout phases of the competition. Regional areas such as Hawkes Bay and Northland, however, hosted many tourists throughout the RWC.

Community support

The community engagement programme ensured widespread and enthusiastic support for the Rugby World Cup. Spectators and locals embraced initiatives such as the Fan Trail, which led spectators on foot from the Auckland waterfront to Eden Park, or the fan-zones that were set up throughout the country. More spectators than anticipated walked the Fan Trail, saying it was one of their highlights of the tournament.¹⁷

Risk management

The earthquakes in Canterbury presented significant challenges for the tournament organisers, particularly the devastating Christchurch earthquake on 22 February 2011. Christchurch had been scheduled to host eight matches, including two quarter-finals. However, due to widespread damage and infrastructure issues, the matches had to be reallocated to other regions. The contingency planning was effective in achieving this.

Outcome and legacy

New Zealand’s delivery of the RWC demonstrated that the country is able to successfully host major global events. Significant features include the cooperation between the government and event organisers, the infrastructure investment delivered to support the tournament, and the mobilisation of communities nationwide to act as hosts. This latter feature was unique in the history of the tournament.

Feedback received by RNZ 2011 Ltd indicates that the delivery of the tournament, particularly around matches and venues, met and often exceeded expectations from the international rugby community, media and sponsors.

An understanding of the planning and operational excellence required to deliver major events is now embedded within government and the wider sports community. This capability is being applied to the FIFA Under-20 World Cup and the Cricket World Cup in 2015, and the World Masters Games in 2017.

Financial outcomes for New Zealand



Economic benefits

The economic impact of large sports events can be difficult to quantify as it is calculated on the basis of money spent that would not have been otherwise.

For the purposes of this report, some of the publicly-available data on economic activity that was driven, or given greater impetus, by the RWC has been summarised.

Statistics New Zealand international migration figures indicate that the RWC met the attendance forecasts and surpassed the visitor forecast. It remains to be seen how it performed against the economic forecasts in the longer term.

Independent economic analysis

The Ministry of Economic Development commissioned Market Economics Limited to quantify the medium-term impacts of the RWC on the New Zealand economy.

Market Economics Limited used a computable general equilibrium (CGE) methodology to generate the results. CGE models consider the impact of spending in the years leading up to and including an event as well as subsequent years. These models are used widely by economists to assess the medium to long-term economic implications of major sporting events (such as the 2000 Sydney Olympics and the 2006 Melbourne Commonwealth Games).

The CGE modelling estimated a medium term net expansion of the New Zealand economy in the order of 0.34 percent of GDP (NZ\$573 million¹⁸). Using the same methodology it is estimated that the medium term impact on the Auckland regional economy was in the order of 0.52 percent of GDP (\$322 million¹⁹). A summary of the national economic analysis is included in Part C.

Another, Input Output, methodology may be used to estimate the short term impact on the flows of money or goods among various sectors or industrial groups within an economy of a known influx of tourist or increases in capital spending such as happened around the RWC.

Using this methodology Market Economics assessed the short term impacts of the RWC on the New Zealand economy (2006-2012) as being in the order of \$1,730 million and that it sustained the equivalent of 29,990 jobs for the duration of one year.²⁰ Within the Auckland regional economy the assessed short term impact was \$728 million and that the equivalent of 13,940 jobs were sustained for the duration of one year.²¹

Both methodologies lead to the conclusion that, overall, the RWC provided an economic stimulus to the New Zealand economy in generally difficult economic times.

Outcome and legacy

Overall, the RWC provided an economic stimulus to the New Zealand economy in generally difficult economic times.

Statistics New Zealand reported an overall increase in gross domestic product in the September and December 2011 quarters. The RWC spanned both of those quarters. Strong growth in retail, accommodation and restaurants expenditure contributed to that outcome.

Spending by spectators and participants is captured in the retail, accommodation and restaurant industry figures.

According to Statistics New Zealand, overseas visitor spending increased 5.7 percent during the RWC. This figure includes spending by international spectators and participating teams. The combined volume of expenditure by overseas visitors in the September and December 2011 quarters was 16.2 percent higher when compared with the same period in 2010.

The impact of the 133,200 international visitors is mainly captured in the December 2011 quarter, since visitor spending is measured when they depart the country. Comparing unadjusted numbers, spending by international visitors was up NZ \$141 million from the December 2010 quarter.

¹⁶ Tourism New Zealand, unpublished report. *Rugby World Cup Marketing Campaign*. p. 11.

¹⁷ Auckland Council. (2011). *Rugby World Cup 2011: Evaluation Report*. p. 31.

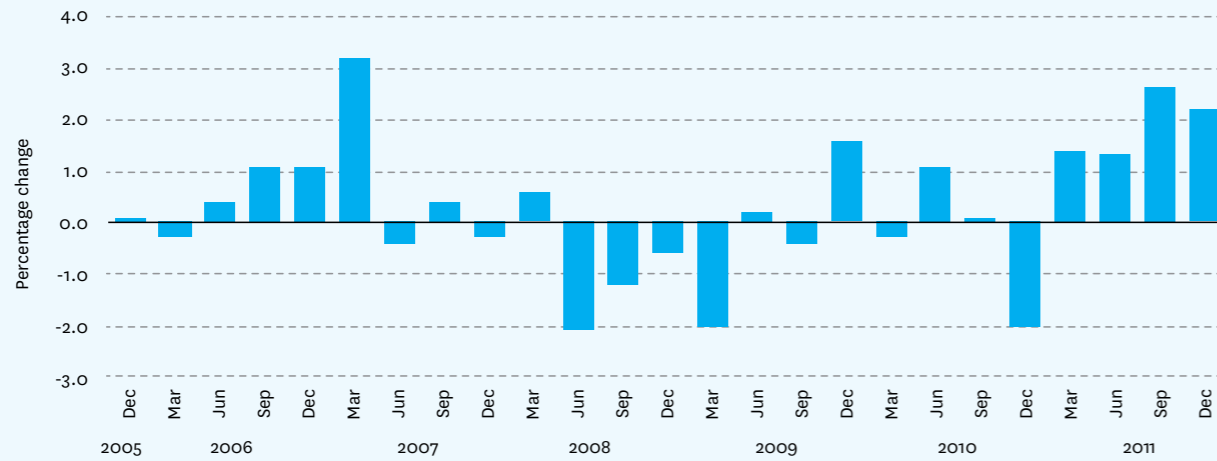
¹⁸ Conversion based on mid-point exchange rate for March 2012.

¹⁹ Auckland Council Group, *Rugby World Cup 2011: Evaluation Report, September 2012*. p. 56.

²⁰ Market Economics email to MBIE 20 September 2012.

²¹ Auckland Council Group, *Rugby World Cup 2011: Evaluation Report, September 2012*. pp 53-54.

Figure 3: Gross domestic product - retail, accommodation and restaurants, quarterly change



Notes: Seasonally-adjusted chain-volume series expressed in 1995/96 prices.
Source: Statistics New Zealand

Retail, accommodation and restaurant activity was up 2.2 percent in the December 2011 quarter, following a 2.6 percent increase in the September 2011 quarter. Activity in retail, accommodation and restaurants was at its highest quarterly level since the series began in 1986.

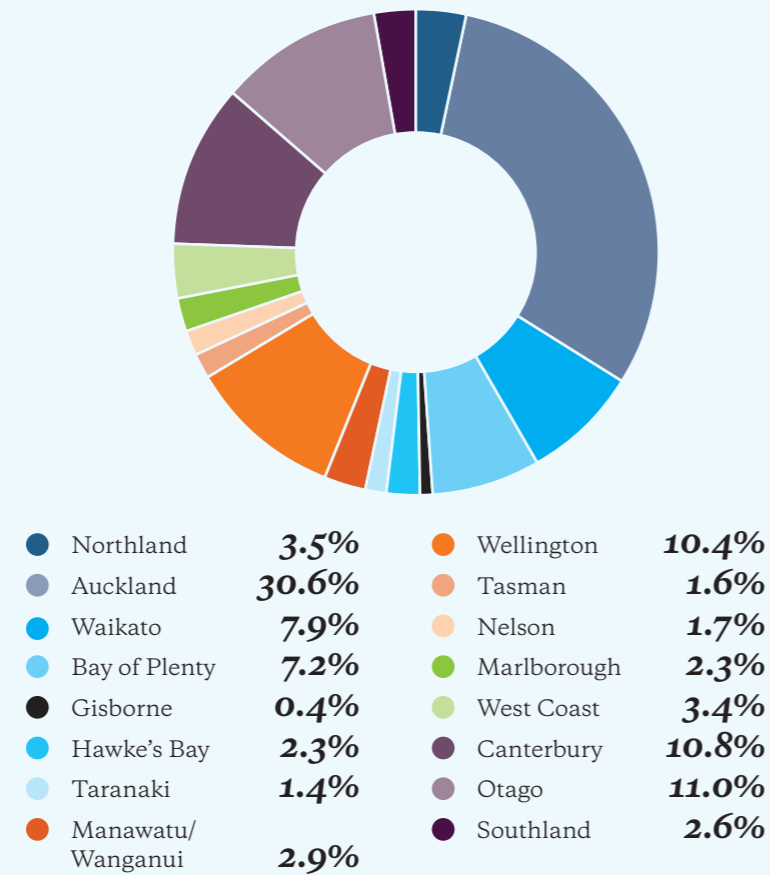
Retail trade activity for the September and December 2011 quarters combined was 5.7 percent higher than the same period in 2010. In the December 2011 quarter, retail trade activity increased 2.3 percent, and accommodation and restaurants activity increased 1.9 percent.²²

According to the Tourism Industry Association's post-RWC survey, respondents reported variable results. While there was a benefit from increased international visitors, decreased domestic tourism and distance from game venues negatively impacted some operators.

However, in general, spending by international visitors was higher than usual across New Zealand. Figure 4 shows the percentage of electronic transactions by overseas cards (volume) in each region during the Rugby World Cup.

22 Statistics New Zealand. (2012). *Gross Domestic Product: December 2011 quarter*. p. 9.

Figure 4: Electronic transactions by overseas cards (volume) (1 September 2011-31 December 2011)



Source: Ministry of Economic Development

Other economic measures

- The IRB estimates that economic activity in New Zealand was boosted by more than NZ\$500 million.
- NZ\$269 million was spent on RWC tickets.
- Expenditure for the delivery of the event by RNZ 2011 was NZ\$177 million.
- There was an estimated increase in tourism expenditure of between NZ\$220 million and NZ\$340 million.
- Customs and excise revenue was NZ\$108 million higher than forecast in the second half of 2011, caused in part by the RWC.
- There was significant investment in stadium development, including budgets of NZ\$280 million for Eden Park in Auckland, NZ\$60 million for Stadium Christchurch and NZ\$198 million for Dunedin.
- More than NZ\$280 million was committed to other related infrastructure developments (e.g. the Manukau Harbour Crossing and the SH88 realignment in Otago).
- The total direct economic impact for the Wellington region was estimated to be more than NZ\$94 million.²³
- Total spending in the Nelson-Tasman region is estimated to be more than NZ\$14 million.²⁴
- Air New Zealand expected a NZ\$30 million benefit due to demand generated by the Rugby World Cup.
- Auckland International Airport Limited stated the company's financial performance benefited from travel related to the RWC 2011.
- Electronic card transaction figures showed spending on consumables was up 9.3 percent in September and 6 percent in October, and spending on accommodation was up by 11.7 percent in September and 9.7 percent in October. All retail spending was up 0.7 percent in September and 1.5 percent in October.²⁵

23 Angus & Associates. (2012). *RWC 2011 Wellington Region Economic Impact Report*. p. 10.

24 Nelson Regional Economic Development Agency. (2012). *Nelson Tasman Regional Economic Impact Assessment, Rugby World Cup 2011*. p. 4.

25 Statistics New Zealand Electronic Card Transaction Data. (October 2011).

Promoting Brand New Zealand



The Rugby World Cup provided an opportunity to showcase the country, ensure repeat visits and generate positive word-of-mouth publicity when visitors returned home.

The formal brand proposition for the RWC promoted the triple themes of culture, tourism experiences, and business creativity and innovation.²⁶

The NZ 2011 Office enabled central government to coordinate activities across these themes in order to showcase the country as both a tourist destination and a place to do business.

Broadly speaking, the themes of culture and tourism were supported by the REAL New Zealand Festival programme, and the themes of business creativity and innovation were supported by the business engagement programme – specifically the REAL New Zealand Showcase, the Business Club and the Cloud.

Auckland was the gateway through which most international visitors arrived and the tournament hub. This presented an opportunity to promote Auckland as New Zealand's international city.

Culture and tourism

Strategy

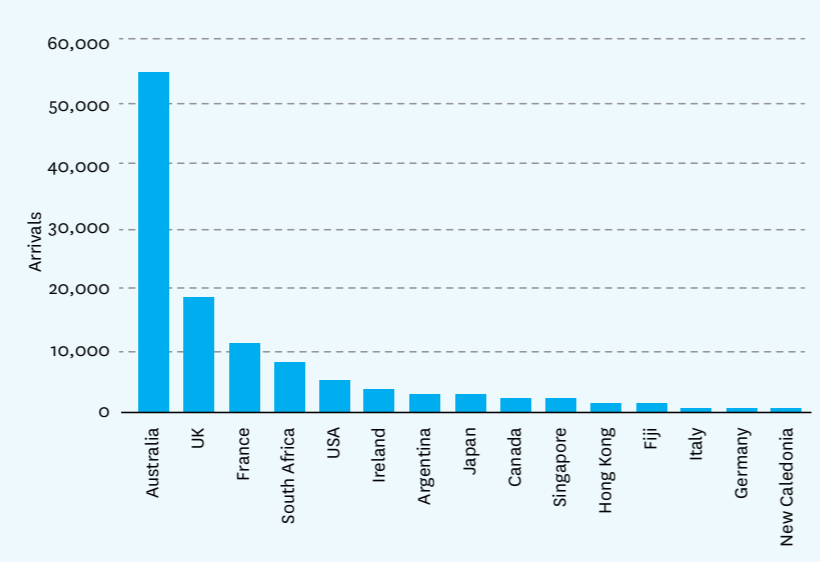
The culture and tourism strategy built on New Zealand's points of cultural difference to create a distinct experience, with a view to encouraging return visits. Key examples include the influence of Māori culture at the opening ceremony and before each game, and the exceptional level of support for the Tongan team.

Tourism New Zealand (TNZ) developed a marketing campaign to support the RWC and drive tourism to New Zealand. Key audiences were identified as rugby fans and their families, expatriate New Zealanders, corporate sponsors, guests and VIPs. These audiences were targeted within specified market types.

Table 3: Tourism New Zealand target markets²⁷

MARKET TYPE	GEOGRAPHICAL AREA
Principal rugby nations and primary tourism markets	England, Australia, Japan, USA
Principal rugby nations and secondary tourism markets	Scotland, Ireland, Wales, South Africa, Italy, France, Argentina, Canada
Rugby nations' ex-pat destinations	Hong Kong, Mainland China, South East Asia (inc. Singapore), Middle East
Other rugby nations and not tourism markets	Romania, Georgia, Russia, Africa, Tonga, Fiji, Samoa

Figure 5: RWC arrivals by country of residence²⁸



²⁶ New Zealand 2011 Office, unpublished report. *New Zealand 2011 Post-tournament Leverage Programme Summary*. p. 2.

²⁷ Tourism New Zealand, unpublished report. *Rugby World Cup 2011 Marketing Campaign*. p. 5.

²⁸ Tourism New Zealand, unpublished report. *Rugby World Cup 2011 Evaluation Summary*. p. 1.

As part of the marketing campaign, a giant rugby ball was set up in Paris, London, Tokyo, Sydney and Auckland. When it appeared in France during the 2007 Rugby World Cup, Air New Zealand and others in the tourism industry noted that it was particularly effective in generating interest in New Zealand and the RWC 2011.

Annual visitor numbers from France to New Zealand have increased since 2007, peaking in 2011 during the tournament.²⁹

Social media

Social media was used to promote events and provide tourism information.

Highlights from the social media campaign:

- RNZ 2011's Facebook pages generated 1.5 million friends or followers.
- The REAL New Zealand Festival online marketing campaign recorded approximately 1,300 Twitter followers and 4,500 tweets. It also had around 11,900 Facebook followers, 60 percent of whom were based offshore, and nearly 5,800 blog views.³⁰
- TNZ's social media campaign recorded over 134,000 views on the New Zealand 100% Pure YouTube channel. TNZ also created the Capture 100% Pure You app.³¹

Feedback and legacy

Four different surveys conducted during and after the RWC sought feedback on New Zealand as a holiday destination.

In response to one survey, 83 percent of respondents said they were very likely to recommend New Zealand as a holiday destination, and 69 percent said they were very likely to return for a holiday.³² In another survey, 97 percent said they would recommend New Zealand as a travel destination, and 93 percent wanted to return some time in the future.³³

The survey data indicates that the RWC may have a significant tourism legacy. Tangible success will be measured by continuing tourism from target markets but it will be difficult to isolate RWC from other influences.

The RWC 2015 organisers also stand to benefit from New Zealand's marketing efforts. The Facebook page and database have been passed on to England to assist them with their campaign for the next tournament.

Business engagement programme

The prime objective of the business engagement programme was to create connections.³⁴ It was delivered through four sub-programmes, all of which were primarily oriented toward networking and promotion:

- The REAL New Zealand Showcase: a platform for New Zealand firms and industries to hold networking and promotional events
- The Cloud: a purpose-built venue on Queens Wharf that served as the main hub for the Auckland fan-zone, REAL New Zealand Festival events, business networking and hosting, and sector showcase programmes

- The NZ 2011 Business Club: a network that helped New Zealand businesses make new connections, particularly with international visitors
- The NZ 2011 Commercial VIP Programme: similar to the business club, this programme connected New Zealand businesses with senior and influential visiting business people.

The main themes of the programmes were business creativity and innovation. More detailed information about these programmes is covered in Part B of this report.

Legacy

Despite the (unsurprising) fact that only a small percentage of overseas ticket holders were interested in doing business whilst in New Zealand for the RWC, the Business Club database acquired around 4,500 overseas members. New Zealand business people have made thousands of new connections, which may drive future business growth and investment opportunities.

The business engagement programme could be considered a success in terms of the number of connections made; however, tangible success will only be realised if those connections mature and develop into business relationships that generate export revenue, provide investment opportunities for New Zealand businesses globally or bring investment into New Zealand.

²⁹ Statistics New Zealand historical monthly visitor figures, table ITM007AA.

³⁰ New Zealand 2011 Office, unpublished report. *REAL New Zealand Festival Project Report*. p. 12.

³¹ Tourism New Zealand, unpublished report. *Rugby World Cup Marketing Campaign*. p. 20.

³² Ministry of Economic Development (2012). *International Visitor Survey, year ending December 2011*.

³³ Tourism New Zealand, unpublished report. *Queens Wharf Survey and Rugby World Cup 2011 Evaluation Summary*.

³⁴ New Zealand 2011 Office, unpublished report. *NZ2011 Overview Report*. p. 21.



Building social cohesion

International media programme

The large contingent of international media in the country was identified as an opportunity to significantly boost New Zealand’s profile. It was anticipated that increased media coverage would provide a global advertising banner on which to base tourism campaigns, and that a higher profile could lead to increased business activity and potential inwards investment.

TNZ oversaw the programme, which involved more than 1,000 accredited media from 39 countries. It implemented two work-streams: the first provided base service and media activities; and the second was a targeted programme for 59 key media and rights-holding broadcasters.

Outcome and legacy

An IRB-commissioned survey of international media found that 82 percent of respondents scored the quality of New Zealand’s hosting of the RWC between 8 and 10 out of 10 (with 10 being extremely satisfied).³⁵

TNZ reports that 80 percent of the media they hosted were highly satisfied with their experience and the remaining 20 percent were satisfied.

Promoting Auckland as an international city

Strategy

Promoting Auckland as New Zealand’s international city was a key government objective.³⁶ Auckland invested NZ\$98 million to make the most of the opportunities associated with the RWC.³⁷

Providing Auckland with the right infrastructure to deliver a major international event was an important part of this investment. This included providing venues for locals and tourists to celebrate the event.

Promotional activities were driven primarily by the region. However, several initiatives and investments also had support at a national level as they supported the broader objectives of the RWC.

Outcome and legacy

Auckland demonstrated it is able to host a major event. This may well improve its chances of securing the rights to host other major international events. Certainly, the investment in infrastructure and the institutional knowledge gained during the RWC is likely to be beneficial in future bids. Auckland’s successful bid to host the World Masters Games in 2017 is one such example.

New infrastructure has also left a legacy for Auckland. The varied use of the Queens Wharf facilities during the RWC is now seen as a model for future tournaments and major events.

The major initiatives

The community engagement programme comprised four major initiatives:

- elevating the silver fern as the national emblem
- an education programme
- Adopt a Second Team
- Best-dressed Street.

Elevating the silver fern as the national emblem

The initiative to elevate the silver fern as the national emblem was intended to create a sense of unified and widespread support for the All Blacks and a common brand symbol. It also aligned with Brand New Zealand.

57,000 packs (570 kilometres) of bunting branded with the silver fern were sold as part of this initiative.

Education programme

The RWC 2011 education programme involved distributing activity books to primary and intermediate school students throughout New Zealand, including home-schooled and kura (Māori immersion schools) students. Content was aligned with the New Zealand curriculum and endorsed by the Ministry of Education. It was based mainly around the social sciences.

In July 2011, 450,000 books plus teachers’ notes were sent out.

Adopt a Second Team

The education programme was the springboard for the Adopt a Second Team programme. It gave schools and local communities a chance to support another team alongside the All Blacks. Toolkits were sent to RSAs, retirement villages, businesses, hospitals and community groups.

Wairarapa’s connection with the Georgian team and Marlborough’s welcome to the Russian team were notable as particular successes of the programme. More information and stories are included in Part B.

Best-dressed Street

The Best-dressed Street competition called for residents to decorate their streets according to two themes: their adopted second team or a general RWC theme. The competition ran from mid-July to 23 September 2011. Asics Drive in Mangere, Auckland, was awarded the prize for its exceptional entry. See page 62 for more information.

Christchurch

Christchurch continued to be involved in the tournament, despite the relocation of matches due to the earthquakes. The marine sector, for example, organised the Canterbury Marine Festival to replace the cancelled Christchurch Boat Show.

Teams also made special efforts to support Christchurch. The Scottish rugby team donated the NZ\$78,000 that it had raised through dinners and other events, the Wallabies spent time with schoolchildren, and the All Blacks visited the local community.

35 Tourism New Zealand, unpublished report. *Rugby World Cup 2011 Evaluation Summary*. p. 9.

36 Cabinet Business Committee paper, CBC 10 (85). (6 August 2010).

37 Auckland Regional Steering Group for Rugby World Cup 2011. (2009). *2011 and Beyond; Auckland’s Rugby World Cup Legacy*. p. 4.

38 NZ 2011 Office, unpublished report. *Community Engagement Executive Summary*.

39 Ibid.

The Cloud on Queens Wharf also hosted Canterbury Week during the quarter-finals to showcase Canterbury's business innovation.

The RWC 2011 Roadshow

The RWC 2011 Roadshow toured 27 towns and cities in a custom-painted truck. On arrival, it transformed into an events centre.

Daily coverage of the local events aired on early morning television, ensuring a national audience. Cumulative statistics indicate that the roadshow reached 1.6 million viewers.⁴⁰

Outcome and legacy

Anecdotal information suggests that the level of community engagement was the most significant legacy of the Rugby World Cup in New Zealand.

Social cohesion, however, can be difficult to quantify. The level and enthusiasm of participation in the various community engagement programmes was a good outcome, but that may not demonstrate a legacy as such.

One possible measure is an increased interest in rugby, either through more players or more spectators. In terms of increased player numbers, official figures will not be available until September 2012 but anecdotal evidence suggests registrations are increasing for this season.

REAL New Zealand Festival

The REAL New Zealand Festival was designed to present New Zealand as a multi-faceted country rather than simply a rugby destination. It comprised more than 1,200 events and covered categories as diverse as arts, music, food and wine, heritage, business, sport and music.⁴¹

The programme received funding from the Lottery Grants Board (NZ\$9.5 million), the Ministry of Culture and Heritage's Cultural Diplomacy International Programme, local bodies and independent producers.

The festival was a key part of the RWC's overall success. Events were spread throughout the country, including regions where there were no matches, and this helped to build the stadium of four million. It also provided opportunities for regions to showcase themselves and give visitors a more diverse experience.

Further details, including a summary of the festival, are included in Part B.

Outcome and legacy

Post-tournament reports indicate two main legacy outcomes:⁴²

- Many of the events were so successful that they may become annual events.
- The festival demonstrated event-holding capability in new places – for example, the REAL Tauranga Festival.

The volunteer programme

More than 5,500 volunteers received training through the official tournament volunteer programme.⁴³ While the training was not primarily directed at promoting Brand New Zealand, volunteers' performance suggests that it aligned with wider New Zealand objectives.

The government funded NZ\$6 million of the total NZ\$8.4 million cost of the volunteer programme. This investment helped ensure a strong contingent of hosts at key sites who could enhance the visitor experience. The funding was intended to also help develop a lasting volunteer legacy.

Outcome and legacy

The volunteer programme can be considered a major success story. RNZ 2011 Ltd believes that one of its key legacies will be increased recognition of the value of volunteering in New Zealand. It also stated that it will raise the bar in regard to volunteer programmes for future sporting and major events.

An independent report⁴⁴ assessed the programme against three success criteria:

- the effect on customers
- volunteers' experiences
- the immediate and long-term benefits to the voluntary sector.

The report concluded that the programme elicited very positive customer and volunteer feedback, but was less conclusive on sector benefits.

Key response data

Customers

There was positive anecdotal feedback from organisations that used the RWC volunteers – including Eden Park, which may use volunteers at future events.⁴⁵

A survey of New Zealanders found that 90 percent agree or strongly agree that the Rugby World Cup volunteers contributed positively to visitors' overall experience of the tournament.⁴⁶

Volunteers

Almost 80 percent of volunteers rated their personal experience of the programme as 6 or 7 out of 7 on a satisfaction scale.⁴⁷

Benefits

Responses to a post-tournament survey of 47 percent of volunteers found that 49 percent are likely to volunteer for another organisation, group or club; and 45 percent are likely to volunteer for another event.⁴⁸

The New Zealand Experience

- **Tangible outcomes were achieved for each of the four key themes that emerged from New Zealand's Rugby World Cup hosting experience. Many of the investments made in hosting the Tournament will provide New Zealand with future benefits.**
- **However it is the intangible elements of hosting the Tournament and the impact they had on the nation that will define the event for most New Zealanders in the future. In a challenging time for the country, particularly Canterbury residents, this event lifted spirits and reaffirmed New Zealanders' belief in the things that make their country special.**



⁴⁰ New Zealand 2011 Office, unpublished report. *REAL New Zealand Festival Post-tournament Briefing Notes*. p. 1.

⁴¹ New Zealand 2011 Office, unpublished report. *REAL New Zealand Festival Project Report*. p. 11.

⁴² Rugby World Cup Limited. (2011). *Volunteer Programme Report*. p. 3.

⁴³ Ibid.

⁴⁴ 'Customers' refers to RWC spectators and organisations that used volunteers (e.g. stadia, local councils).

⁴⁵ Brettell, D. (2011). *Independent Analysis of RWC 2011 Volunteer Programme*. pp. 5-9.

⁴⁶ UMR Omnibus Results, unpublished report. *Reaction to Volunteering during the Rugby World Cup*. p. 6.

⁴⁷ Victoria University and AUT University. (2011). *Experiences and Legacies of Rugby World Cup 2011 Volunteer Programme*. p. 4.

⁴⁸ Victoria University and AUT University. (2011). *Experiences and Legacies of Rugby World Cup 2011 Volunteer Programme*. p. 2 and 9.



PART B:

The Complete Experience

An insight into how the RWC unfolded across the country

About this section

This section documents the Rugby World Cup experience across the country. It looks at what happened in communities and the regions, provides an insight into the perceptions of international visitors, and discusses the spin-off for businesses and the environment.

It draws on programme reports, tourism statistics, regional impact reports (including regional surveys) and Rugby New Zealand 2011 (RNZ 2011) reports.

Primary data collection was also undertaken. This included surveys of international ticket purchasers and international media, an analysis of New Zealand's international arrival cards, interviews, and information from the Ministry of Economic Development's International Visitor Survey.



New Zealand's biggest cities may have played a leading role in hosting the matches, but every region across the country lent a little magic to the tournament.

The tournament across the country

New Zealand's biggest cities may have played a leading role in hosting the matches, but every region across the country lent a little magic to the tournament.

Up and down the country, the energy and excitement of the Rugby World Cup was palpable, reinforcing the idea that New Zealand is indeed a stadium of four million people, all cheering the teams on from the sidelines.

Local government played a vital role in this success in the regions. Twenty-four councils actively participated, despite only twelve of those councils hosting matches in their city.

Attendance and participation

In total, 48 matches were played by 20 teams across 12 venues. Total attendance at matches was 1,475,688, of which 952,000 came through domestic ticket sales, 331,801 from overseas tickets sales and the remaining 191,887 tickets were sold through hospitality packages. The matches were well supported throughout the country, with an average attendance of 90 percent. Many matches were also sold out (see Part C for game-by-game figures).

Rugby fans who couldn't make it to a live match, however, were able to watch it on the big screen at the fan-zones dotted across the country, or on television.

Town and cities throughout New Zealand welcomed and hosted the teams, and took part in the plethora of activities built around the tournament.



THE CITIES AND TOWNS THAT HOSTED TEAMS OR MATCHES





International visitors in the regions

International visitors travelled all around the country during the RWC. Although the actual travel patterns of international visitors are not known, electronic payment card data has provided some insight. Figure 6 estimates that just over a third of all international visitor days were spent in Auckland, with Otago, Canterbury and Wellington together accounting for another third.



International visitors travelled all around the country during the RWC.



Figure 6: Share of international RWC 2011 visitor days across New Zealand

● Auckland	36%
● Otago	13%
● Canterbury	11%
● Wellington	10%
● Waikato	7%
● Bay of Plenty	6%
● Other North Island	9%
● Other South Island	8%



Source: Ministry of Economic Development

The remainder of this section illustrates how the tournament impacted on some of the regions around the country.

Auckland

Auckland hosted the opening ceremony and match, the semi-finals and the final, as well as 11 other matches. Matches were held at Eden Park and North Harbour Stadium.

In addition to the Queens Wharf fan-zone, (see page 7 or overleaf), four other fan-zones around the city were set up to allow people to gather together and celebrate during the knockout stages. A sixth fan-zone was opened in the central city for the final game.

A coordination group⁴⁹ was established to lead the planning and delivery of the tournament in Auckland. This group managed 139 projects associated with the RWC.

Auckland City invested about NZ\$100 million into the hosting of the event. Approximately NZ\$65 million of this money funded infrastructure improvements, such as railway station upgrades and the Eden Park redevelopment (NZ\$10 million). The remainder went towards operational programmes, such as welcome ceremonies and other preparations.

Over 2,500 people volunteered in Auckland as part of the official volunteering programme.

Auckland RWC 2011 attendance

Stadia

Eden Park crowds totalled 633,453 over 11 games, peaking at 61,000 for the final. An additional 110,884 spectators attended the four pool matches at North Harbour Stadium.

Fan-zones

The Queens Wharf fan-zone attracted over a million people during the tournament, and a further 125,000 people visited the five additional fan-zones in the greater Auckland area.

More than 120,000 people used the Fan Trail, the official track for those wanting to walk to the stadium and enjoy the entertainment provided along the way. The Fan Trail linked Auckland's Queens Wharf to matches at Eden Park.

The opening night on Auckland's waterfront brought together up to 150,000 residents and visitors. Many more gathered in parks and other venues across Auckland to enjoy the fireworks display, the largest ever in New Zealand.

The opening night on Auckland's waterfront brought together up to 150,000 residents and visitors.



⁴⁹ The group comprised Auckland Tourism, Events and Economic Development (ATEED); Auckland Council; Auckland Transport; Waterfront Auckland; Regional Facilities Auckland; Eden Park; North Harbour Stadium and training venues; the Auckland, North Harbour and Counties Manukau rugby unions; Auckland Airport; and New Zealand Police.



Queens Wharf & the Cloud

Queens Wharf was a major drawcard for fans in Auckland. It became the country's biggest fan-zone, holding up to 10,000 people at a time.

Rugby matches were aired live on multiple indoor and outdoor screens, while food and beverage outlets and other facilities provided catering. The popularity of the Queens Wharf fan-zone resulted in it being expanded to Cooks Wharf to cope with the demand. It was extended again to Marsden Wharf for the final.

Queens Wharf was also home to the Cloud, REAL NZ Festival events (including concerts) and the giant rugby ball. The Cloud - a purpose-built venue - hosted concerts, business events, REAL NZ Showcase events and areas for media, business meetings and VIPs.

When games were not showing, the Cloud became an exhibition space, showcasing New Zealand business innovation and creativity through displays and a video produced by NZTE. The event centre also featured the event Taste at the Cloud, which gave visitors a chance to sample New Zealand cuisine and wine, including from some of New Zealand's top chefs.

During the tournament, over 300 formal bookings for more than 8,000 people were made for the Business Lounge. The daily business networking sessions became very busy in the last weeks of the RWC.

International ticket purchasers rated their satisfaction with the Queens Wharf fan-zone and the Cloud at 7.7 out of 10.



Since its redevelopment for the RWC, Auckland's downtown waterfront has become a valuable asset for the public.

Ongoing benefits

Auckland, as New Zealand's biggest city and the main focus of tournament activities, stood to gain the most from New Zealand's hosting of the RWC.

To capitalise on the opportunities, Auckland City developed the plan, 2011 and Beyond: Auckland's Rugby World Cup Legacy. The interim report, *Rugby World Cup 2011: Evaluation Report*, assesses the achievement of the plan's ambitions. A summary of some of the findings are reported below, including results from a survey of Auckland residents and businesses, and visiting media.

The survey results indicate that the RWC encouraged both Aucklanders and visitors to celebrate their city. There were 1,396 respondents to the survey: 471 domestic visitors, 852 international visitors and 73 media.⁵⁰ It illustrated visitors' favourable impression of Auckland's involvement in the tournament and the benefit this could have for future tourism.

Table 4: Perception of Auckland's contribution to the tournament

STATEMENT	DOMESTIC VISITORS	INTERNATIONAL VISITORS	VISITING MEDIA
Auckland is a great place for an event of this kind	93.4% agree	90.9% agree	87.7% agree
	0.6% disagree	2.2% disagree	4.1% disagree
Likely to recommend Auckland to others as a place to visit	88.3% likely/very likely	92.0% likely/very likely	87.7% likely/very likely
	1.7% unlikely/very unlikely	2.2% unlikely/very unlikely	2.8% unlikely/very unlikely



There were mixed perceptions from the Auckland business community on the economic benefits derived from hosting the event. However, 76 percent of respondents to a survey of Auckland RWC 2011 Business Club members agreed that the RWC "increased awareness of Auckland as a place to invest and do business". Sixty-four percent said it "increased my business network in New Zealand" and 52 percent felt that it "increased my business network internationally". Auckland City indicated that a number of significant business deals are in the pipeline as a result of the Cup.

Making the most of the waterfront

Since its redevelopment for the RWC, Auckland's downtown waterfront has become a valuable asset for the public. This view is supported by an Auckland City survey of Auckland residents⁵¹ that found that 78.8 percent agreed that improvements to the CBD and waterfront will reap long-term benefits for Auckland.

A range of projects from Queens Wharf to the new Wynyard Quarter were fast-tracked for completion before the RWC. The projects included:

- the joint purchase of Queens Wharf by the Auckland Regional Council and the New Zealand Government
- upgrading Queens Wharf and Shed 10 (a historic cargo shed), and building the Cloud
- developing the Viaduct Events Centre
- building the Wynyard Crossing Bridge and developing the first stage of the Wynyard Quarter, which encompasses Karanga Plaza, Jellicoe Street, North Wharf and Silo Park.

⁵⁰ The media results are partial as full survey results were not available at the time of reporting.

⁵¹ The survey results are based on a sample of 1,009 respondents and quoted and weighted to the Auckland population.

Following the RWC 2011, Queens Wharf remains a public space jointly owned by Waterfront Auckland and the government, while the Cloud and Shed 10 are available for hire for other events. Shed 10 also receives cruise ship passengers during the summer season.

Taking pride in Auckland

Auckland residents considered the RWC had a positive impact on the city. Auckland City's post-tournament survey indicated that:

- 89 percent were proud of the way Auckland hosted visitors for the RWC
- 86 percent were proud of how the Auckland region looked and felt during the tournament
- 88 percent felt that the RWC generated a greater sense of community spirit in Auckland.

Use of public transport

To encourage the use of public transport, travel to matches was free for all RWC ticketholders. About 600,000 people used this option to get to the matches in Auckland. More broadly, approximately 6.6 million people used Auckland public transport in September 2011 - 1 million more than in September 2010.

The survey of Auckland residents indicated that 36.5 percent felt more likely to consider using public transport to get around Auckland as a result of their experience during the RWC.

Improvements to transport infrastructure fast-tracked for RWC 2011

- There were major improvements to streets around Eden Park and upgrades to the Kingsland and Morningside rail stations, as they serve the stadium.
- New bus shelters were built, footpaths improved, and other improvements made along the Fan Trail.
- Auckland Airport extended its northern runway and upgraded the international and domestic terminals. The completion of the Manukau Harbour Crossing reduced the motorway drive time between the airport and CBD by 20 minutes.

Positioning Auckland as a major events destination

Auckland's role in hosting the RWC helped demonstrate its capability in successfully hosting events.

According to the Auckland City survey, over 89 percent of residents, international and domestic visitors, and visiting media agreed with the statement "regardless of which team wins/won, the RWC 2011 in Auckland has been a successful event". Eighty-three percent of Auckland residents agreed that with the statement "Auckland should bid to host future events".

Despite some operational challenges caused by larger than anticipated crowds during the opening night, over 69 percent of residents, international and domestic visitors, and visiting media viewed the events associated with the RWC in Auckland as well-organised and professional.



The economic benefits to the Wellington region from RWC 2011 totalled NZ\$94 million – almost double the original forecast.



Wellington

Wellington hosted eight matches during the tournament, including two quarter-finals. The total number of tickets sold for Wellington matches was around 268,000, of which approximately 72,000 were international sales. Domestic sales to people outside the Wellington region accounted for 44 percent of total sales.

A Wellington City Council report⁵² estimated the economic benefits to the Wellington region from RWC 2011 totalled NZ\$94 million – almost double the original forecast (based on Wellington’s initial allocation of four games). This included direct expenditure by domestic and international visitors attending RWC matches in Wellington as well as direct tournament expenditure by officials, teams, staff and media. A further NZ\$13 million was contributed by people who visited the region as a result of the tournament but did not attend matches.

A survey of 491 visitors to Wellington, undertaken for Wellington City Council, was used to estimate spending by visitors attending matches. It found international fans spent on average around NZ\$277 each per day, while domestic visitors spent around NZ\$151. These were significantly higher than historical norms. Most of this expenditure went towards food, drinks and accommodation.

Half of the visitors surveyed reported that the tournament was the main reason for their visit to Wellington, while a further 14 percent said it was a one of the reasons they visited. Satisfaction ratings were exceptionally high, averaging 9 out of 10 for visitors’ RWC experience overall. Wellington’s fan-zone also rated well, scoring an average 8 out of 10.

As well as the economic gain accruing from RWC visitors, Wellingtonians benefited in other ways. A survey of 500 residents found that they saw benefits for their community.

Residents embraced the tournament, attending associated events in large numbers. Total attendance at the local fan-zone equated to everyone in the region visiting at least once. Thirteen percent of all respondents indicated they had attended matches, and 8 percent of respondents attended at least one festival event.

Survey respondents were asked about whether they agreed or disagreed with a number of statements relating to social and cultural outcomes of the event. On a scale of 1 to 10, with 10 being the highest score, the following statements received the highest level of agreement:

- The event instilled a sense of pride in the community – 7.6
- The event brought people together within the local community – 7.5
- The event encouraged local people to get involved – 7.4
- The event promoted multiculturalism – 7.1
- The event made the region a better place to live – 6.8

The Wellington City Council report concluded that the RWC 2011 was a success for the region. The report also noted that the hosting of matches was likely to produce long-term benefits for the region’s economy as it enhanced Wellington’s event management capabilities and reputation.

⁵² Angus & Associates Ltd. (2012). *Economic Impact Report RWC, Wellington Region.*

Nelson

Nelson hosted three pool games during the tournament. Average attendance was 14,600, four percent lower than capacity. Locals and other New Zealand residents turned out for the games in large numbers, while international attendance averaged 2,390 per game.

A Nelson Economic Development Agency report⁵³ estimates that NZ\$14 million was spent in the region as a direct result of the RWC. This includes NZ\$5 million spent by domestic and international visitors attending RWC matches in Nelson; expenditure by officials, teams, staff and media; and money spent on upgrading Trafalgar Park, the regional stadium.

Trafalgar Park’s \$7.4 million upgrade included new turf, upgraded facilities (including media facilities) and new lighting. The upgrade was seen to have enhanced its ability to gain hosting rights for other events, such as Super 15 rugby games and football (FIFA) tournament games. It is therefore likely to bring future benefits to the region.

The tournament uplifted and mobilised the local community. Residents attended events, warmly welcomed and hosted teams and fans, and volunteered their time. After the matches in the city concluded, a fan-zone was set up during the semis and finals as a way of bringing the energy of the tournament back to Nelson.

The Economic Development Agency’s report indicated that the impact of the RWC differed across the wider region, partly reflecting the different type of visitors to the region during the tournament. The positive impact of visiting fans was greatest for those in businesses in proximity to the Trafalgar Park venue. Elsewhere in Nelson, Richmond and Tasman, businesses did not experience a lift in custom. Rather, a number reported a fall in trading during the tournament.



⁵³ John Cook & Associates. (2012). *Nelson Tasman Regional Economic Impact Assessment – Rugby World Cup 2011.*

The tournament uplifted and mobilised the local community. Residents attended events, warmly welcomed and hosted teams and fans, and volunteered their time.



The Otago stadium was one of the region's highlights – and not just locally but around the country. Almost everyone involved – including journalists and teams – lauded its atmosphere and design.



Christchurch

Christchurch had originally been scheduled to host five pool matches and two quarter-finals at the newly-renovated AMI Stadium. Unfortunately, the city and the stadium were badly impacted by earthquakes, particularly the devastating earthquake on 22 February 2011. As a result, all the RWC games scheduled for Christchurch were re-allocated to other centres.

Three pool matches stayed in the South Island, with Nelson, Dunedin and Invercargill hosting an additional game each. The other two games were re-allocated to Wellington and North Harbour, in Auckland. Christchurch's two quarter-finals were played at Eden Park in Auckland.

The rescheduling also meant some changes to team bases. Queenstown hosted Georgia as well as Ireland, Romania and England. Hanmer Springs in North Canterbury became a new team base and hosted Australia for four nights. Read more about the RWC in Christchurch on page 70.

Dunedin

Dunedin hosted four games for the Rugby World Cup. Attendance averaged 25,000, with two matches selling out. Over 25 percent of those attending matches in Dunedin were international visitors.

Dunedin's Town Hall was home to the fan-zone, which became a popular venue with locals and visitors alike. During the first match between New Zealand and France, around 2,000 fans gathered in front of the big screen to cheer their side on.

The Otago stadium was one of the region's highlights - and not just locally but around the country. Almost everyone involved - including journalists and teams - lauded its atmosphere and design. The stadium, which opened in August 2011, is the world's only permanently enclosed, natural turf stadium. While it has a capacity of 30,000, this was reduced to 26,000 during the RWC to accommodate the space required by the large media contingent.

In summing up the regions participating in the tournament, an Otago Daily Times journalist commented:

“Now, as the finals head to the North Island, Otago and Southland can reflect with pride on their role in what has - so far at least - been a giant New Zealand-wide festival...The Rugby World Cup took off here as it did elsewhere in the country.”



RWC infrastructure investment

To prepare for the Rugby World Cup, new stadia were built or transformed, roads improved and public transport upgraded.

Stadia

Eden Park, Auckland

Eden Park was transformed. It was the most significant redevelopment in its 100-year history. The NZ\$280 million redevelopment included a government contribution of NZ\$190 million. The improvements included:

- increasing seating capacity to 60,000 specifically for the RWC. This was later reduced to a permanent seating capacity of 50,000
- constructing a fully-integrated facility with a full concourse, electronic ticketing, upgraded seating, improved access, state-of-the-art screen displays and electronics, improved lighting and sound systems to enhance the sporting atmosphere, 48 new corporate boxes and two VIP lounges
- improving and streamlining the transport options, including adding a new bus terminal and a new walkway to the Kingsland railway station.

Christchurch stadium

Prior to the devastating earthquakes in Canterbury, the Christchurch stadium underwent a NZ\$60 million upgrade, with the government contributing NZ\$15 million towards the task. Its capacity was boosted to 40,000, making it the second-largest sporting venue in New Zealand. The new 13,000-seat Deans Stand was the centrepiece of the redevelopment. Unfortunately, the facilities were badly damaged in the earthquakes and could not be used during the tournament.

New Forsyth Barr/Otago Stadium in Dunedin

The Forsyth Barr/Otago Stadium opened on 5 August 2011, becoming New Zealand's largest multi-purpose indoor venue and the world's first rugby stadium to have a transparent roof over a grass playing surface. The budget for the build was NZ\$198 million, which included a NZ\$15 million contribution from the government.

Other stadium upgrades

Trafalgar Park in Nelson was upgraded at a total cost of NZ\$7.4 million, which included a government contribution of NZ\$1.5 million.

The Northland Event Centre in Whangarei also benefited from improvements. The cost of the upgrade was NZ\$16 million. The government contributed NZ\$2.5 million towards the cost.





Road, airport and railway infrastructure

The SH20 Manukau Harbour Crossing, Auckland

The SH20 Manukau Harbour Crossing, which is part of the Auckland Western Ring Route, was fast-tracked ahead of the Rugby World Cup. It now provides a north to south motorway alternative to the SH1 motorway.

The new harbour crossing opened in September 2010 while the SH20-1 Manukau Extension opened in January 2011. They improved access to and from Auckland International Airport, gave rugby fans another route to get to Eden Park and other venues, and helped relieve congestion and improve safety on Auckland's roads.

The construction cost for the harbour crossing was NZ\$230 million.⁵⁴

SH88 realignment, Otago

State Highway 88 - which is the main route to and from the Port of Otago - was realigned to improve the flow of traffic from the centre of Dunedin to the university campus and port. While the work needed to happen anyway, it was fast-tracked to meet the transport needs of Dunedin's new stadium and a new University of Otago building.

The project cost around NZ\$25 million.⁵⁵

Street improvements around Auckland's Eden Park

The upgrade of Sandringham Road was fast-tracked along with the redevelopment of Eden Park and the Kingsland railway station. The upgrade significantly improved traffic and pedestrian safety, and led to faster and more reliable travel for buses and cyclists.

The project included the realignment of the road outside the Kingsland railway station and a new link between Sandringham Road and Walters Road. Along with helping manage crowds, the new link improved pedestrian access to Eden Park.

Overall, the work has significantly improved safety and accessibility during major events at Eden Park.

Airport and railway infrastructure

As the main station serving Eden Park, Kingsland railway station needed some important improvements ahead of the Rugby World Cup. Its upgrade included widening and lengthening both railway platforms to increase passenger capacity and improve overall safety and operation.

Morningside railway station, which is the main stop for fans from the western suburbs, was also refurbished.

Airports around the country also benefited ahead of the Rugby World Cup:

- Auckland International Airport's international terminal had a major makeover, along with improved border processing, an extended northern runway and the construction of two new hotels at the airport.
- Wellington Airport's international terminal was upgraded, doubling the number of passengers able to be processed from 500 to 1,000 per hour.
- Christchurch Airport's new terminal opened in April 2011 at a cost of NZ\$161,428,000.⁵⁶

⁵⁴ NZTA reported cost: www.nzta.govt.nz/projects/mhc/about/

⁵⁵ www.nzta.govt.nz/planning/what-funding/board-decisions/20100429-sh88-realignment.html

⁵⁶ www.christchurchairport.co.nz/en/about-us/media-centre/media-releases/2011/



This new infrastructure was not driven specifically by the RWC, but it did play a role in bringing forward the work.

Other investments

A number of other investments were made to support the successful delivery of the RWC:

- Wellington City Council brought forward some projects, including reintroducing buses into Manners Street to make the public transport system quicker and more reliable; upgrading Courtenay Place; improving links between the CBD and the Wellington Regional Stadium; and improving the pedestrian route between the cruise ship terminal and the city centre. The artificial training surface at ASB Sports Centre and Te Whaea were also completed ahead of the RWC.
- Auckland City Council made improvements to Auckland's bus network by buying more modern buses and improving the route from the airport to the CBD.
- Telecom and Vodafone collaborated on a multimillion-dollar investment at Eden Park. As a result, 255 new antennae and 13 kilometres of cable were installed. Both companies also ensured services were maintained in other areas that were likely to have more crowds or traffic, such as at fan-zones, public transport stations and busy arterial routes or airport-to-CBD corridors.

The benefits for New Zealand

Some significant investments in infrastructure were brought forward because of the RWC. Along with supporting the successful delivery of the event, this new infrastructure has brought many other long-term benefits.

The investment in stadia should mean that further investment is not required for upcoming major events, like the FIFA Under-20 World Cup or the Cricket World Cup in 2015.

Apart from the stadia, the largest infrastructure investments were three road improvement projects in Auckland and Dunedin. Along with contributing to a successful tournament, the improvements helped improve the general transport infrastructure in those regions.

Other substantial infrastructure investments were not significantly influenced by the RWC, but they did support it and have improved New Zealand's ability to host major events in the future.



Some significant investments in infrastructure were brought forward because of the RWC. Along with supporting the successful delivery of the event, this new infrastructure has brought many other long-term benefits.





International perspectives - what the tourists experienced

The Rugby World Cup brought unprecedented numbers of fans to our shores. These fans, which came from all corners of the world, infused the country with energy and passion for the sport. They came despite the global financial crisis, Christchurch's earthquakes, language barriers or currency fluctuations. Many travelled more than 24 hours to get here.

The RWC was seen as an opportunity to boost tourism and strengthen New Zealand's reputation as a world-class destination. Visitor numbers were almost twice what New Zealand had originally anticipated. In 2008, 71,000 international visitors were expected,⁵⁷ while in 2010 the forecast⁵⁸ was for 85,000. The final result was more than 133,000.

Feedback from international visitors

A survey⁵⁹ of RWC visitors revealed overwhelming satisfaction with the tournament and New Zealand more generally. The survey was sent to 37,345 international ticket purchasers, with 12,259 completing the survey.

Survey respondents gave New Zealand an average rating of 9.1 out of 10 for its hosting of the tournament. Their overall enjoyment of attending the RWC was also high, at 8.9 out of 10.

Satisfaction with RWC venues scored 8.7, and tournament information was rated at 8.9 out of 10.

Fans were least satisfied with RWC ticketing, giving it a score of 8.1 out of 10, which is still a high rating. Anecdotal evidence suggests that the process for dealing with unwanted tickets and pricing were the main reasons for the lower score.

Visitors said they found New Zealand a warm and welcoming place and this extended to customer service, which received an overall rating of 8.7. However, visitors were less impressed with prices. Satisfaction with New Zealand's value for money scored 7 out of 10. This may have been a result of price hikes, particularly around accommodation, and the high value of the New Zealand dollar.

Here are some of the other rating highlights from the survey:

- Information on travel in New Zealand - 8.6
- Ease of doing business in New Zealand - 8.1
- Māori cultural experiences - 7.8
- Festival events (e.g. the REAL NZ Festival) - 7.8

Many visitors said they would recommend New Zealand as a holiday destination. Eighty-three percent said they were very likely to do so, while a further 9 percent said they were quite likely. Almost 70 percent said they were very likely to return to New Zealand, and a further 17 percent said they were quite likely to.



The survey highlighted how a major event can generate visitors. Respondents were asked to choose from statements that best described the reason for their visit to New Zealand. Seventy-six percent said they came to New Zealand specifically for the RWC, while 13 percent altered planned travel to coincide with the RWC. The remaining 11 percent said their plans coincided with the RWC.

Visitor numbers

On arriving in New Zealand, all passengers must fill out an international arrival card. Around tournament time, a question on the RWC was added to capture information about visitors' reasons for travel. Analysis of the arrival card data found that over 133,000 visitors came to New Zealand for the RWC 2011.⁶⁰ However, the survey of international ticket purchasers revealed that a number of the visits were made by individuals making multiple trips to New Zealand for the RWC - 8 percent of visitors made two visits and 4 percent made three or more visits.

Australia was the main source of arrivals for the Rugby World Cup, bringing in 55,200 visitors. Large numbers of visitors also came from the United Kingdom (19,100), France (11,100), South Africa (8,500), the United States (5,500) and Ireland (4,300).

Compared to 2010, visitor numbers from South Africa, France, Ireland and Argentina were up by over 300 percent during September and October 2011. This result was significantly different to historical fluctuations in visitors from these countries.

The average length of stay for RWC visitors from participating countries was 13.2 days, compared to 19 days for other visitors arriving during the same period.⁶¹ The average length of stay for all RWC visitors was 13.5 days. Visitors from Scotland and Tonga spent the most time in New Zealand, averaging 27 and 26 days respectively, while visitors from Australia and Japan averaged eight days.

Visitors from countries that didn't have a team in tournament also turned up for the Cup. Visitors from Singapore and Hong Kong were the most significant RWC attendees from non-participating countries, with 2,200 and 1,500 visits each. Visitors from both of these countries stayed in the country nine days on average. The high number of RWC visitors from Singapore and Hong Kong may reflect the number of ex-pats from traditional rugby-playing nations working in these countries or growing popularity for the sport. In terms of length of stay, German visitors had the longest length of stay, averaging 31 days, followed by people from the Netherlands with 22 days, and Swiss visitors with 21 days.

Forty percent of visitors who came for the RWC were in New Zealand for the first time.

Read more about how the numbers stack up for RWC visitors and non-RWC visitors in Part C.

Many visitors said they would recommend New Zealand as a holiday destination. Eighty-three percent said they were very likely to do so, while a further 9 percent said they were quite likely.



⁵⁷ www.rugbyworldcup.com/mediazone/news/newsid=2027271.html

⁵⁸ www.med.govt.nz/sectors-industries/tourism/tourism-research-data/other-research-and-reports/rugby-world-cup-2011-preliminary-forecasts

⁵⁹ The survey was conducted by the Ministry of Economic Development with the assistance of RNZ 2011 Ltd.

⁶⁰ Alternative methods can be used to estimate the number of international visitors for the Rugby World Cup. One estimate of 157,750 was based on the detailed analysis of information from the ticket sales database, together with data from core providers of ticket-and-travel packages and hospitality packages. In the analysis, it was noted that not all flights in the period around the RWC were issued with arrival cards.

⁶¹ For visitors who indicated they were here for the RWC 2011 on their arrival card, length of stay is calculated by matching arrival and departure information. For other visitors, length of stay is estimated from a sample of the intended length of stay reported on arrival cards.

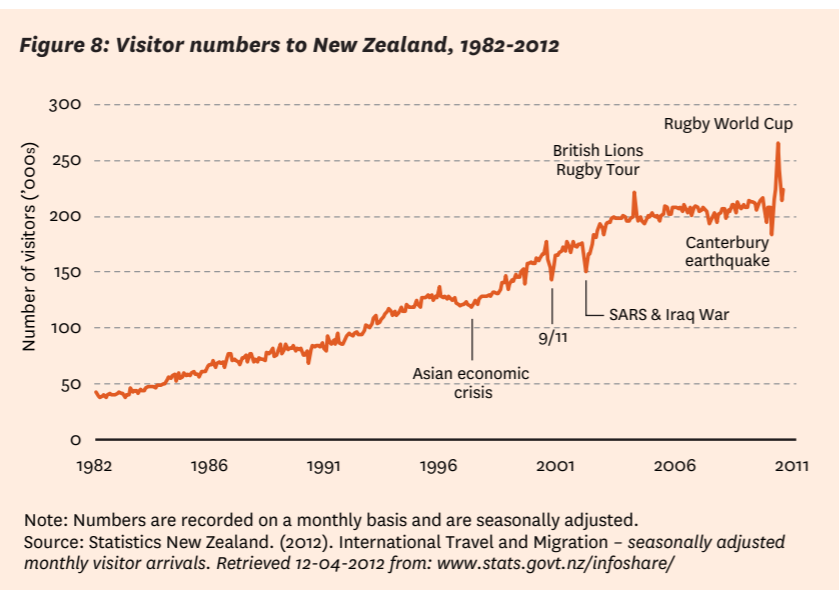
Overall, the tournament provided a real boost to the tourism industry during the shoulder season.



Overall, the tournament provided a real boost to the tourism industry during the shoulder season. As illustrated in figure 7 below, although thousands of international visitors came for the RWC in September and October 2011, the total did not reach summer month peaks. The total influx during RWC was 140,000 below the 360,000 peak in December 2011.

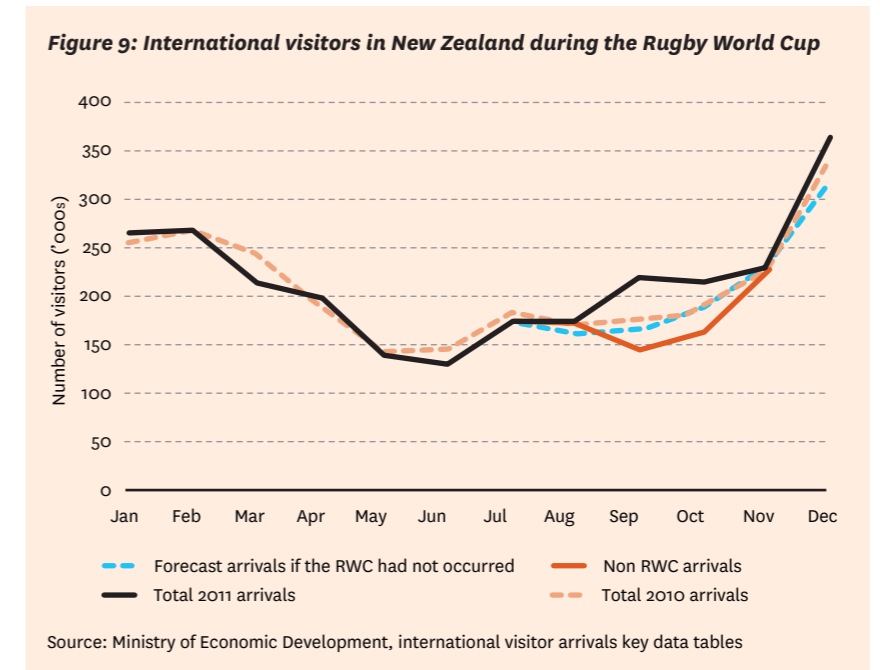


Figure 8 below illustrates the lift in visitor numbers during the RWC 2011 compared to other years. It also shows the impact of other positive and negative events that have influenced visitor numbers to New Zealand - for example, the British Lions rugby tour, the outbreak of the virus SARS and the Iraq war.



Major events alter normal visitor patterns to a destination. Although major events usually increase visitor numbers, some visitors may choose not to visit a region to avoid the event. This displacement of normal visitors during major events is a well-known effect which both Tourism New Zealand and our national airline, Air New Zealand, took steps to try to mitigate.

Figure 9 below compares actual international visitor numbers in 2011 with a forecast of potential overseas arrivals (July-December) had the RWC not occurred. Clearly the RWC arrivals greatly exceeded both the numbers of people estimated as likely to come to New Zealand if the event had not occurred and also the actual arrivals during the latter part of 2010. The graph also allows a comparison to be made between visitors arriving in 2011 who said they were in New Zealand for reasons other than the Rugby World Cup and the presumed numbers of people who would have come to New Zealand anyway. On this basis it is possible that 20,000 potential visitors in September and 25,000 potential visitors in October may have altered their plans to travel to New Zealand over those two months, and that one possible reason for this was the fact that the RWC was being held here.



Visitor expenditure

Overseas visitors who came for the Rugby World Cup spent around NZ\$390 million, according to estimates from the International Visitors Survey.⁶² Overall, tourist expenditure for 2011 was NZ\$5.8 billion, 3 percent higher than 2010.

Between 60 and 75 percent of rugby visitors' expenditure can be regarded as a net increase in tourism spending - that is, an increase in what would have been spent by visitors if the RWC was not held in New Zealand.⁶³ Tourism expenditure in 2011 was between NZ\$220 million and NZ\$340 million higher as a result of the Rugby World Cup, even after taking sampling uncertainty into account.

The International Visitors Survey found that the average expenditure of adults who indicated that they were here for the RWC was \$3,400, compared with the average of NZ\$2,400 for all visitors.

⁶² Statistics New Zealand's International Visitor Survey is based on interviews of tourists departing from New Zealand airports. Estimates are subject to sampling error - for example, the relative margin of error for the estimate of Rugby World Cup visitors' spend is ± 20 percent.

⁶³ The net increase in expenditure takes into account international visitor displacement during September and October 2011.





NEARLY 50,000 VISITORS GOT A TASTE OF NEW ZEALAND WHEN THEY VISITED THE GIANT RUGBY BALL.

Branding and media

The success of the Rugby World Cup was important to New Zealand's brand and reputation.

As a small country, we have to clearly communicate to the world about what we can offer: both in terms of business and trade as well as sport and culture.

Government agencies collaborated closely to communicate a consistent New Zealand brand. Tourism New Zealand (TNZ) continued to focus its brand communication on New Zealand's stunning landscapes, welcoming people and captivating experiences. New Zealand Trade and Enterprise worked alongside TNZ to promote its key message that New Zealand is a creative and innovative place to do business. They also jointly promoted the message "open for business" after the major earthquake in Christchurch in February 2011.

These messages underpinned many of the activities surrounding the tournament, including:

- TNZ's giant rugby ball, which was exhibited in London, Paris, Tokyo and Sydney before the tournament to promote New Zealand and raise awareness about the RWC in key markets. The giant ball was a temporary inflatable venue hosting an audiovisual show that transformed the ball into a variety of New Zealand environments - from beaches, volcanoes and bush walks to the sidelines of a rugby match. Nearly 50,000 visitors got a taste of New Zealand when they visited the giant rugby ball. It generated 62 million media impressions and 160 million broadcast impressions. The giant rugby ball's final home was on Queens Wharf during the tournament.
- The Innovation Showcase at the Cloud included displays of creative and innovative New Zealand products and an eight-minute video, which featured the best of the country's landscapes, activities, business ideas and people.
- The aim of the RWC international media programme led by TNZ was to ensure that visiting media enjoyed their non-rugby experience and communicated positive holiday and business sentiments to their audiences through news stories, blogs, tweets and word of mouth. A total of 1,013 accredited media from 39 countries travelled to New Zealand to cover the RWC, creating substantial opportunities for enhanced branding and showcasing.
- B-roll material (high-definition footage of New Zealand) was created specifically for the RWC. The resource proved extremely popular with broadcast media. It is estimated that at least 20 international broadcasters made use of this resource on multiple occasions.
- Business and community engagement programmes were designed to demonstrate that New Zealand is a creative, innovative nation, attractive for investment, a great place to do business and a fun, breath-taking place to visit.

Alongside the branding promotion, the New Zealand Fern (silver fern) was elevated as New Zealand's national emblem. It featured prominently in promotional material. New Zealanders have a history of using the silver fern as their national team symbol and this was clearly visible during the tournament.





Māori culture also provided a clear point of difference and strong visual elements that helped to further build New Zealand's brand.

Influencing a country's brand takes time, particularly for changes to be enduring. Some preliminary indicators of the success of the branding work are discussed below.

Tourism marketing value of the RWC

Research undertaken around the time of the RWC shows a positive impact on both awareness of New Zealand and the levels of interest in visiting the country.

Following the tournament, interest in visiting New Zealand increased by an average of 59 percent across the key tourism markets of Australia, United Kingdom, Japan, USA and Germany.

Table 5: Impact of the RWC on interest in visiting New Zealand

MARKET	PRE-EVENT: AWARENESS OF HOST NATION	POST-EVENT: AWARENESS OF HOST NATION	POST-EVENT: INCREASED INTEREST IN VISITING NZ
Australia	44%	67%	37%
UK	47%	80%	60%
Japan	32%	49%	74%
USA	17%	18%	68%
Germany	36%	47%	57%
Average total	35%	52%	59%

Source: Tourism New Zealand

International business marketing value from RWC

A survey⁶⁴ of primarily international business visitors to the Cloud found that their perceptions of New Zealand business had changed after visiting the Innovation Showcase and watching the eight-minute video on New Zealand (as set out in table 6). This work concluded that there was a powerful shift in perceptions of New Zealand business around innovation, technical advancement, creativity and ingenuity. This shift was supported by the key messages in the showcase and video: "we do things differently" and "New Zealand is a great place to do business".

Around 60 percent of those surveyed said they were likely to invest or do business in New Zealand, and more than a third said they were actively looking for opportunities. The survey of international ticket purchasers, while not focused on business visitors, found that 30 percent were quite likely or very likely to return to New Zealand for business.

International media perceptions of New Zealand

A survey of RWC-accredited international media⁶⁵ showed that, aside from covering the RWC, 39 percent also covered travel/tourism, 26 percent sport/recreation, 12 percent food and beverage, and 9 percent business in New Zealand.

⁶⁴ Further details on the survey conducted by Nielsen on behalf of New Zealand Trade and Enterprise can be found at: www.nzte.govt.nz/features-commentary/In-Brief/Pages/Kiwi-innovation-icons-on-show-at-The-Cloud-spark-attitude-shift.aspx

⁶⁵ The survey received 134 responses.

The accredited media were asked to rate the quality of New Zealand's hosting of the Rugby World Cup. This question received an average rating of 8.9 out of 10 (with 10 being extremely satisfied). Other satisfaction ratings include:

- Rugby World Cup match venues - 8.4
- Quality of information provided on New Zealand - 8.7
- Overall customer service experience in New Zealand - 8.1
- Information on travel in New Zealand - 8.2
- Māori cultural experiences - 7.8
- Ease of doing business in New Zealand - 7.9
- Festival events (e.g. the REAL NZ Festival) - 7.9
- Overall value for money while in New Zealand - 6.9

Table 6: Changed perceptions on New Zealand business after visiting the Cloud

ATTRIBUTE	NUMBER OF VISITORS SELECTING ATTRIBUTE
Creativity	↑ 22% to 72%
Innovation	↑ 35% to 66%
Technologically advanced	↑ 44% to 59%
Ingeniousness	↑ 33% to 48%

There was a powerful shift in perceptions of New Zealand business around innovation, technical advancement, creativity and ingenuity.





**33 PERCENT OF
NEW ZEALANDERS
WERE INSPIRED
TO VOLUNTEER OR
SPEND MORE TIME
VOLUNTEERING.**

Volunteers

Rugby World Cup volunteers were vital to the success of the tournament. Through their warm, welcoming attitude, volunteers helped create an experience visitors will never forget.

While they might have shared distinctive teal blue uniforms, the volunteers themselves came from all walks of life – such as the retired banker, the mother of six, the law student or the former Silver Ferns national netball coach.

In the spirit of *manaakitanga* (the act of hosting and caring for people), volunteers adopted the tagline “With Open Arms”. They certainly lived up to this motto.

By tournament’s end they had proven their worth, including with the international media. *The Guardian* correspondent Shaun Edwards cited the volunteers as one of the top three things that England could learn from New Zealand when they hold the Rugby World Cup in 2015 (27 October 2011):

The first is the volunteer stewarding that made life so easy from first to last. Initially, the pale blue uniforms tended towards slightly naff. However, very soon the sight of one proved particularly reassuring, especially when trying to exit stadiums around midnight.

Work to assemble the volunteer workforce kicked off 18 months before the tournament. At its peak, a total of 38 people were part of the organising team. Approximately 18,000 New Zealanders registered to volunteer, 8,000 were interviewed, and 5,564 were successfully recruited.

Volunteers were deployed around the country – including in Christchurch. Collectively, they undertook more than 51,000 scheduled shifts, ringing up more than 357,000 hours. Their roles were diverse. Some helped match-goers at stadiums; others assisted with transport and logistics or assisted the media.

Feedback from volunteers

Feedback from spectators and the general public was overwhelmingly positive. Respondents to a survey⁶⁶ were asked, “How would you rate the contribution of these volunteers to your experience of the RWC 2011 tournament?” The average rating by international ticket purchasers was 8.9 out of 10.

A survey of New Zealand residents⁶⁷ found that:

- 90 percent agreed that volunteers “have contributed positively to visitors’ overall experience of the tournament”
- 85 percent agreed that “they have enhanced New Zealand’s reputation as a destination for major events”
- 33 percent of New Zealanders were inspired to volunteer or spend more time volunteering.

The experience for the volunteers was also positive with surveys⁶⁸

**Volunteers helped
create an experience
visitors will never forget.**



⁶⁶ The survey was answered by 12,259 international ticket purchasers.

⁶⁷ The UMR survey results are based on a telephone survey of a nationally-representative sample of 750 New Zealanders of 18 years of age and over.

⁶⁸ Research undertaken by Victoria University and the Auckland University of Technology.



highlighting four standout responses:

- “We had a great time.”
- “We were proud to be part of the delivery of the event.”
- “We were well prepared to do the job.”
- “We’d do it again.”

Volunteers rated their experience as 6.15 out of 7 on average, while they gave the overall organisation of the Team 2011 volunteer programme 6.04 out of 7.

The survey results also indicate that participation in the Team 2011 volunteer programme increased young people’s (18-24 years old) confidence. Forty-eight percent of young people strongly agreed it helped them be more confident about volunteering in the future, while 35 percent strongly agreed that it would help with applying for jobs in the future. These results were higher than the rates for older volunteers.

The volunteers’ legacy

One of the aims of the volunteer programme was to provide long-term benefits by increasing the interest in volunteering and creating future resources.

The most tangible legacy is the 5,564 trained and experienced volunteers who will be available for future events. Team 2011 volunteers have been asked to sign up to VolunteerNet, an online community designed to connect volunteers to opportunities throughout New Zealand. Sign-up rates are encouraging and the Ministry of Economic Development has built a complementary database of potential volunteers for future events. As an example, at least 200 Team 2011 volunteers answered a call for help from Triathlon NZ for an event in Auckland just three weeks after the RWC final.

The experience with Team 2011 volunteers has also created additional demand from the major stadiums at Eden Park, Wellington, Waikato and Dunedin.

At the end of the Rugby World Cup, RNZ 2011 gave the government all the key material that was used to develop and successfully operate the volunteer programme, along with an overview document summarising the programme. This material will extend the existing resources available to the public through VolunteerNet and the Sport New Zealand (formerly SPARC) website (www.sportnz.org.nz).



An independent review

An independent review⁶⁹ of the volunteer programme was highly complimentary, observing that it provided value, generated very positive experiences for volunteers, and benefited the broader voluntary sector:

The RWC organising committee could justly claim to have conducted a well-planned and managed programme, if the broader voluntary sector had the capacity and was willing to learn from the programme, it could be a truly positive ‘springboard’ for longer-term growth of volunteering in NZ.

Measured by all feedback, New Zealand can be proud of the contribution which their volunteers made to the success of RWC. The organising committee can be hugely pleased, gratified and relieved, and, last but not least, the volunteers themselves have good cause to feel a deep inner pride.

To read more about volunteers’ stories, see Let’s hear it for the RWC 2011 Volunteers on page 74.

Volunteers rated their experience as 6.15 out of 7 on average, while they gave the overall organisation of the Team 2011 volunteer programme 6.04 out of 7.



⁶⁹ The review was carried out by David Brettell, a consultant who provided advisory services to the volunteer programme, managed a similar programme for the Sydney Olympic Games in 2000, and advised at Beijing’s 2008 Olympic Games.

**MĀORI CULTURE
PLAYED A CENTRAL
ROLE IN RUGBY WORLD
CUP CELEBRATIONS.**





Māori partnership

Māori culture played a central role in Rugby World Cup celebrations.

The opening of the tournament featured the largest canoe fleet in living memory, with six hundred paddlers taking to the water in Waitemata Harbour. Then, later that evening, millions watched the opening ceremony on television.

The story of the nation's creation was told with *mana* (respect) and *kōtahitanga* (a spirit of unity). The world saw that Māori culture underpins New Zealand culture as a whole.

The preparations for this historic moment began much earlier. In 2008, Te Puni Kōkiri (New Zealand's Ministry of Māori Development) started working with RWC coordination groups to support the tournament and the REAL New Zealand Festival. Their aim was to ensure that there was meaningful Māori engagement throughout the tournament. The Rugby World Cup was seen as an opportunity to support Māori culture and promote New Zealand's national identity to the world.



A number of projects with a strong Māori presence were developed to support the RWC and the REAL New Zealand Festival. Most of these projects were initiatives led by iwi and Māori communities themselves.

Throughout the Cup, teams were welcomed to marae, towns and tribal regions around the country. Scottish team members went to Te Rau Aroha Marae in Bluff, the Italian team were welcomed onto Nelson's Wakatū Marae, and the Canadian team were invited to the Waitangi Treaty Grounds in Northland.

The presence and value of Māori culture at the RWC is best summed up by the English newspaper *The Telegraph*, which said:

What New Zealand has, is something of huge worth: a defining cultural pivot around which the whole event could spin. How the coordinator of London's 2012 Olympics must envy New Zealand's cultural coherence...the haka is one of the grand sights of world sport and at the heart of the whole opening ceremony.

Waka Māori

Waka Māori is a special building resembling a large-scale contemporary Māori canoe that was built in Auckland for the RWC. It was used to host events, promote business and add to the visitor experience. The concept was developed by the Māori *hapu* (sub-tribe) Ngāti Whātua o Ōrākei. Their objectives were to:

- tell the story of Māori people by profiling New Zealand Māori rugby
- create a dynamic and colourful space where Māori would want to be, thereby attracting tourists
- use RWC for business opportunities with Pākehā, Māori and international visitors
- raise the profile of Māori innovation, business, arts, culture and entertainment.

The concept was realised in the form of a 74-metre long and 16.6-metre high construction at the Auckland Viaduct. The waka was built using 100-percent recyclable textile and wood and is capable of being resized and reassembled elsewhere. The waka has 501 square metres of floor space, full sound, lighting, air-conditioning and heating, and can hold up to 600 people.

During the RWC, it featured five showcases of Māori culture:

- Waka Mānu, an opening gala for business networking
- Waka Ngahau, a series of live entertainment shows
- Waka Tākaro, a Māori rugby exhibition and Māori rugby club
- Herenga Waka, an artisans' village
- Waka Pakihi, a business sector showcase.

At Herenga Waka, which comprised three large pavilions, Māori from the *iwi* (tribe) Ngāti Whātua showcased carving and weaving exhibitions, traditional tattoo artists, and a contemporary Māori art gallery.

There were 397,000 visits to Waka Māori.

A survey of 482 visitors was undertaken to gather feedback on the experiences of both domestic and international visitors.⁷⁰ Respondents rated their overall satisfaction with Waka Māori at 8.2 out of 10. There was an estimated NZ\$9 million of direct spend as a result of visitors' attendance.

Māori Television broadcast and activities programme

Māori Television was the first indigenous broadcaster to be a lead free-to-air broadcaster of a major global sporting event. Māori Television developed:

- **Māori language commentaries.** It broadcast all 48 RWC games in a bilingual format. Broadcasts were also available on the iwi radio network.
- **In-fill programming.** Significant in-fill programming was produced to present both Māori culture and New Zealand culture while the RWC was underway.
- **Arrangements with international broadcasters.** Māori Television liaised with several international broadcasters to promote broadcasting packages, including with BSkyB, ESPN and TG4.
- **In-stadia content.** Māori Television produced audio-visual material for stadia and other hosting venues to promote local stories and images.
- **A tourism trailer.** Māori Television produced a short Māori-themed video trailer that was used at i-sites (information centres), key hosting venues and other tourism distribution channels.

The story of the nation's creation was told with *mana* (respect) and *kōtahitanga* (a spirit of unity). The world saw that Māori culture underpins New Zealand culture as a whole.



⁷⁰ The survey was undertaken by Te Puni Kōkiri in collaboration with the Ministry for Culture and Heritage and Ngāti Whātua o Ōrākei (www.tpk.govt.nz/en/in-print/our-publications/publications/waka-maori-he-purongo-rangahau-waka-maori-survey-report/?s=829019d2-f304-4105-9346-9b0e48bd0876&ts=1).

**THE VISION OF A STADIUM
OF FOUR MILLION
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NEW ZEALAND.**





The local experience at Te Puna Rugby Club

Many people hoped that the RWC would open doors and foster business partnerships here and overseas. Yet few would have imagined that rugby players themselves could become an export commodity.

Te Puna Rugby Club, a small but passionate club from the Bay of Plenty, experienced this first-hand.

Like most intersections between sport and business, the Te Puna Rugby Club began its links with France through social contacts. Then, once the word got out that Te Puna Rugby Club was opening its doors to French rugby supporters, members received an overwhelming response.



While the club was open to visitors throughout the tournament, members organised one special day on 25 September, the day after the French played the All Blacks in Auckland. A group of 70 French rugby supporters was welcomed on to the adjacent Tutereinga Marae with a *pōwhiri* (welcoming ceremony), followed by a *hāngī* (food cooked in an earth oven) and a seafood feast. The food was cooked by club promotions manager Tommy Kapai Wilson's brother, Stephen, a chef recently returned from nearly three decades living in Paris.



Amongst the group that day were around 40 foresters from Aquitaine, which is in south-western France, the French rugby heartland. The foresters had been in the Bay of Plenty on a forestry field trip and were linked up to the Te Puna Rugby Club through the NZ 2011 Business Club. Mr Wilson saw membership at the business club as an opportunity to establish contacts in France in the hope of exporting "good, free-range rugby players who can earn \$50,000 in France".

He described the September event as a wonderful way to celebrate Te Puna's French heritage.

"We got to tell our story to locals. Before then, there had been a reluctance to acknowledge our French *whakapapa* (ancestry). There's been a ripple effect, locally," he said.

The day's events included a *kapa haka* (traditional Māori music song and dance) performance and a viewing of the *Takitimu waka* (Māori war canoe) that once carried 120 paddling warriors.

"Our French friends left with a tear in their eye and new song in their hearts," Mr Wilson said.

Well, not all of them left. There were still French foresters sleeping on the floor of his house two days after the final.

The tale of Te Puna was a favourite with the French media, and local rugby personality and former All Black, Bull Allen, is said to be making a documentary on the club.

Stories from New Zealand communities

Ultimately, the vision of a stadium of four million was realised. But it wouldn't have happened without the mammoth effort of communities across New Zealand.

These communities embraced the tournament in a multitude of ways: they welcomed the 19 visiting teams with parades, showed their support for adopted nations, waved flags, and worked hard to break down cultural and language barriers. The community engagement programme run by the NZ 2011 Office encouraged many of these activities.

International visitors were welcomed into homes and marae, and treated to genuine Kiwi hospitality.

In Auckland, the Pacific Island community - especially the Tongans - embraced the event with great enthusiasm, helping set the flavour of the whole tournament.

Christchurch continued to be involved in the wider festival activities, despite the challenges associated with the ongoing earthquakes. Team members visited the damaged stadium and city, boosting spirits by their very presence, and also raised cash to help the victims.

A thousand stories could be written about people's experience of the tournament including the reaction of the teams and visiting fans. Here are just a small selection of these stories.⁷¹

The curtain raiser: RWC 2011 Roadshow

In the lead-up to the tournament, a roadshow was organised to create a buzz around the country. It gave people throughout New Zealand the opportunity to experience what the RWC would be like.

More than 27,000 New Zealanders attended roadshow events. Kicking off in Bluff on 4 July, the roadshow toured 27 towns and cities across the country with a very special cargo: the Webb Ellis Cup. Locals were eager to have their photo taken with it as well as take part in the REAL New Zealand Festival and other activities.

Through the roadshow, locals showed how they would welcome visitors and teams to their region. Each day, the two best-dressed attendees were awarded a prize of tickets to RWC matches in their region. People came dressed as rugby balls, goal posts, a potato, sushi and even a Webb Ellis Cup.

A thousand stories could be written about people's experience of the tournament.



⁷¹ The New Zealand community section is compiled from programme completion reports and interviews.



The REAL New Zealand Festival

The REAL New Zealand Festival was the Rugby World Cup's first-ever festival and New Zealand's first nationwide festival. It required a huge commitment from the government, cities and community organisations. The budget of more than NZ\$40 million was made up of funding from the Lotteries Commission, central and local government and the private sector.

The festival celebrated New Zealand and presented the country through arts, culture, heritage, sport, food and wine, stories, landscapes and business.

It was managed out of the NZ 2011 Office and included a team of 18 people.

Festival highlights

- Over the course of the festival, there were 1,236 events across many genres.
- More than one million people visited Queens Wharf in Auckland during the festival; 95,709 people attended 490 shows at the giant rugby ball; and opening hours were extended to cater for the demand.
- The festival included the biggest showcase of New Zealand music ever. Ninety-nine bands played on Queens Wharf and another 40 concerts around the country featured New Zealand musicians.
- More than 85,000 people saw NZOnScreen - a showcase of classic New Zealand television and films - at Auckland's Queens Wharf and on Wellington's waterfront.
- The event Rugby RUCKus in Tolaga Bay attracted more than 1,500 people.
- The music festival Kiwi Day Out at Auckland Domain was attended by more than 70,000 people on Labour Day (24 October).
- The Whanganui Festival of Glass attracted 4,000 people over 10 days, 40 percent of them from out of town.
- In Wellington, more than 11,000 visitors saw the exhibition, The Story of Ka Mate: The World's Best Known Haka at Te Papa.
- The inaugural Port Chalmers Seafood Festival attracted 6,500 people, 30 percent more than expected. It will now be an annual event.
- 26,016 visitors saw the Oranges at Halftime exhibition at 38 locations throughout New Zealand, mostly in small towns. That equates to an average of 377 visitors per day between 8 August and 16 October.
- The World of Wearable Art (WOW) Icons on Tour exhibition attracted 346,422 people at seven venues.

The REAL New Zealand Festival's vision was to present a community-owned, nationwide festival of New Zealand for international and local audiences. New Zealanders and visitors believed it achieved that.

International media gave the festival events a satisfaction rating of 7.9 out of 10, while international ticket purchasers gave it a rating of 7.8.

Historian Jock Phillips summarised New Zealanders' pride in the festival:

In New Zealand's not too distant past, our 'culture' was defined as rugby, racing and beer - and people weren't joking. But if there's one thing that's become clear in this crazy Rugby World Cup, it's that we can proudly embrace art and music and fashion and food and all our country's quirks as Aotearoa's culture...No matter which way the games go, we can be proud that the REAL New Zealand Festival has been a terrific boost to all our creative communities.



THE WORLD OF WEARABLE ART (WOW) ICONS ON TOUR EXHIBITION ATTRACTED 346,422 PEOPLE AT SEVEN VENUES.





Neighbours united: The Best-dressed Street competition

One expression of community involvement in the Rugby World Cup occurred, quite literally, at street level. The NZ 2011 Office encouraged suburban streets around the country to decorate their houses and streets in rugby or national themes, using flags, banners, bunting or lights for inspiration.

The winner was Asics Drive, Favona, in the Auckland suburb of Mangere for their superb effort.

For Asics Drive residents, it all started when neighbours tried to outdo one another by “dressing” their houses. In the end, they decided to combine their efforts and enter the competition.

For their efforts Asics Drive won a fully-catered street party that included a local band, a marquee, decorations, lighting, heating and even an event manager to help organise and run the party.

On the day, six members from New Zealand’s 1987 Rugby World Cup-winning squad – Captain David Kirk, Joe Stanley, John Kirwan, AJ Whetton, Michael Jones and Buck Shelford – surprised everyone by turning up and joining in.

“We have had so much fun getting to know our neighbours throughout this comp,” said resident Jenny Marshall.

“It’s been hilarious coming home from work every day to see what else your neighbours have added. We had so much fun at the RWC opening ceremony. All the neighbours came out into our street and watched it on the big screen. The kids totally loved it, and we created memories that will last a lifetime.”



The learning game: education and the Rugby World Cup

Children across the country embraced RWC-related activities. The school curriculum was used to harness this interest.

The RWC 2011 education programme focused on the tournament as a significant world event. It aimed to enhance student learning across a range of activities via three key components: the New Zealand Rugby Union’s Ruggerland activity sheets; RNZ 2011’s KidZone learning unit, which encouraged children to adopt a second team; and the RWC 2011 activity books.

The books were aligned to the New Zealand curriculum and were endorsed by the Ministry of Education. They were designed by Learning Media. They represented one of the biggest-ever shipments of education material in New Zealand, with delivery to 480,000 students. A separate print run of 50,750 activity books and 2,000 teachers’ guides was also done for Niue, Samoa, Tonga and the Cook Islands.

New Lynn Primary School students with RWC 2011 activity books. Source: NZ 2011 Office.





Adopt a Second Team

Communities around New Zealand were challenged to adopt a second rugby team and cheer them on.

The top prize for the competition was shared by Christchurch's Chisnallwood Intermediate School and Masterton Intermediate.

The Christchurch students adopted Romania. They were given a special behind-the-scenes look at their final training session in Palmerston North. They also enjoyed a VIP stadium tour and got a sneak peek into the team changing rooms and media centre. Players and management later autographed caps and t-shirts and also posed for photos with them.



Adopt every team!

Auckland's Campbells Bay School adopted all the rugby teams. Children learned about the customs, culture and history of the participating countries while exploring their own identity as New Zealanders. They made mock video news reports from Romania, and students performed Fijian dances or prepared food from all the participating cultures.

Deputy Principal Duncan Millward said the programme had helped build cultural awareness among the children.

"The Rugby World Cup booklet was a great starter for us and gave us great ideas, but the classes just took ownership of the cultures and went above and beyond," he said.

The programme's finale was a cultural expo in the school hall. Video news reports, kids in costumes, models, displays and food stalls showcased the culture of their adopted visiting teams and showed the high level of engagement each class had with the RWC.

The guest of honour at the expo, Rugby World Cup CEO Martin Snedden, was impressed.

He commented to the *NZ Herald*: "Listen to the noise. This is learning. They're having fun and they're excited. They've captured what the adult population has captured, but in their learning."



From Georgia to the Wairarapa

One remarkable story that must be told is the relationship that grew between Wairarapa and the Georgian rugby team.

Wairarapa RWC events coordinator Catherine Rossiter-Stead was responsible for the development of the social media tools that helped spark and coordinate the initiative. Facebook, in particular, proved central to what became an emotional experience for Wairarapa people, the Georgian players and their supporters.

Rossiter-Stead had made contact with Facebook pages in Georgia nearly a year before the Cup.

"I was very fortunate to get in touch with the guy who runs the Georgian national rugby team page. He had thousands of people on that page, and he started getting people to add me as a friend. And because he's got contacts with the Georgian rugby management, they saw what we were doing," she said.

Rossiter-Stead drew on her teaching background to get local schools interested and involved. She linked them and the Project Georgia content into a pre-existing site for e-lessons throughout the Wairarapa.

The Project Georgia Facebook page quickly became a two-way channel between Georgia and the Wairarapa.

"The fact that half the [Georgian] management team - and some of the players - had signed up to our Facebook profile and page was probably the key to everything we did in the Wairarapa. Before they got here, they had already bought in to what we were trying to do. So when we put the engagement initiatives out to the team, there was only one that they didn't agree to."

"We will never forget the warmth, the friendship, the attention, which Wairarapa people and your team shared with us." – George Nijaradze, Georgian Rugby Union President





The reception proper began as soon as the team arrived from Wellington. The first town en route, Featherston, had wanted to do something special.

“When the team came over, they were met by this massive group - the local MP, the mayor of South Wairarapa, and loads of school kids and loads of people who had taken the morning off just to meet them. Rain was pouring down, but the players got off the bus to meet and mingle.”

Rossiter-Stead recalls the team’s reaction: “They could not believe it. All these kids were waving Georgian flags and dressed in red and white all along State Highway 2. The best thing about this was that the coach, Richard Dixon, had heard when he was in Featherston that there was a girl, Tyler Hart, in a wheelchair in Greytown waiting patiently in the rain. She was on a corner, and he stopped the bus and some of the players got off the bus to say thank you to her. It was a magic moment. That was the measure of the coach and the team.”

The next day the team went to a marae, said Rossiter-Stead: “They had an opera singer with them...I think he used to play way back, but basically he was a big Georgian rugby fan - and his singing was just beautiful. Singing is very much like in the Māori culture, so we heard many Georgian songs during their stay.”

The following day, the team lunched with VIPs.

“We had a local choral group who sang the Georgian anthem and the opera singer joined in, and they also sang the New Zealand anthem and ‘The World in Union’.”

In the evening, following a plan hatched by former All Black captain Brian Lochore, the team dined with local families, recounted Rossiter-Stead.

“You can imagine what the favourite dessert was - pavlova! So we put the pavlova recipe on the website in Georgian.”

The team reciprocated by holding a banquet.

“The president of the Georgian Rugby Union cooked a meal. He put on this incredible spread of food - Georgian cheeses and Georgian wine. About 50 locals attended and the Georgians dressed in national costume.”

The Georgians (in their Cossack costumes) were also in the parade. Again, local schoolchildren turned out in force.

“We had so many schools. Most people were in red and white and many with the ‘Wairarapa Loves Georgia’ t-shirts. We had people all down both sides of Queen Street in Masterton shouting ‘Georgia! Georgia! Georgia!’ For us, the most amazing thing was that [*the Georgians*] all turned up in the national dress. I cannot tell you the feeling of walking by them and hearing people saying, ‘Wow! Look at what they’re wearing! Omigod, they’re so sexy!’ And chanting ‘Georgia!’ We had a massive big red tractor, a big red bus, classic red cars, banners.”

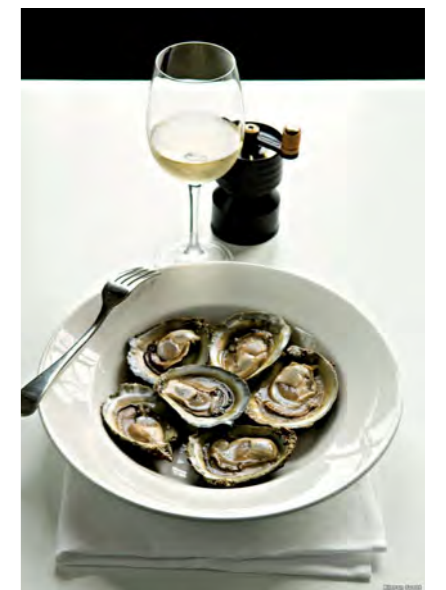
Since Wairarapa did not host a game, the community sent a large contingent to the Georgia vs. Romania and Georgia vs. Argentina games in Palmerston North.

“When the game finished they came all the way over to where we were in the stand - there were hundreds of us - all dressed in red and white, and with the ‘Wairarapa loves Georgia’ t-shirts on. They came over to say a personal thank you to us all. So, even though we didn’t have a match, it didn’t matter. We went to them.”

In a letter to the *Wairarapa Times*, George Nijaradze, the Georgian Rugby Union president, expressed his gratitude to the Wairarapa community.

I kept saying this in New Zealand, and I will repeat it now: it is very hard to surprise the Georgians with hospitality, but what we saw in Wairarapa exceeded all our expectations. We - all of us - will never forget the warmth, the friendship, the attention, which Wairarapa people and your team shared with us. During those nine days we felt completely at home, surrounded by friends.

After such a warm welcome, tourism in both directions is on the cards.





From Russia to Marlborough

When faced with the challenge of how to make the Russian team welcome, Marlborough locals came up with striking innovations, like writing street signs in Cyrillic script and erecting them all over Blenheim.

The centrepiece of the regional effort was the welcome at the airport, followed by a trip to the marae and a visit to the Omas Aviation Museum for the capping ceremony.

Susan Witihira, who headed the Marlborough region's RWC effort said the best moments were the training sessions.



"They were held mid-week, but about 300 people turned up. When the Russian team ran onto the field, everyone stood up and cheered, and the guys stopped and looked around to see what everyone was cheering at. When they realised it was them, they just couldn't believe it. They said it was more people than they got at their games in Russia. They welcomed school kids along to one of their training sessions and a few (i.e. 50) parents came too. The boys did a haka, and they were blown away by that. I just loved every minute of it. It completely took over my life and I loved it," she said.



Southland's experience

The celebrations on the streets of Southland were the end-product of years of preparation.

As Amanda Dowling of Venture Southland explained, the region's bid started in 2006 with the formation of an umbrella organisation called Spin it Wide.

"When we put our bid in to host games, it was joint, with Queenstown and Dunedin and ourselves. Spin It Wide meant that we'd spin it out to all the neighbouring regions, and not just ourselves," she said.

Ultimately, it was the RWC 2011 Roadshow - which started in Southland - that finally kicked things into gear.

"It coincided with the time when everyone was starting to realise, 'Wow! It really is here.' Definitely the buzz started from that, and then grew as [the roadshow] went up the country. People saw the truck pull into town, and it was pretty impressive."

Around that same time, Dowling and her colleagues began putting out requests to see if locals would host visitors. In that respect, the city's limited accommodation infrastructure helped to mobilise the community response.

"We've only got about 1800 beds in the city and by the time the teams and the managers and the media had taken them, we needed home hosting. A lot of people started to ring in then.

"The phones [also] went crazy with everyone trying to find bunting. [Invercargill] Mayor Tim [Shadbolt] went on the front page of the paper saying, 'We know there are thousands of metres out there. Get it up!'"

On the crest of the sudden enthusiasm, the tournament became a showcase for the region's produce. Oysters, Dowling said, always get a lot of media attention.

"We also had Taste of Southland menus at restaurants. We put on a lot of stuff - there were shows, theatre, dancing in the street. That was the locals - they just loved it - the city came alive. Another big thing was to get people out to our smaller regions - Stewart Island, Riverton, the Catlins. And that was interesting. Smaller communities are used to doing things for themselves. Smaller regions with smaller budgets are used to standing up and sorting themselves out. So, in many ways they were ahead of the city. They were painting sheep in Lumsden."

The hard work paid off.

"We had some ministers from similar-sized cities here and they were blown away with the facilities we had here for a city of this size."

On the back of this experience, Southland is feeling capable of taking on other challenges in future, including celebrating the FIFA Under-20 World Cup or hosting other international events.

On the back of this experience, Southland is feeling capable of taking on other challenges in future, including celebrating the FIFA Under-20 World Cup or hosting other international events.





Christchurch and the earthquakes

Following the re-allocation of Christchurch's RWC games to other venues, the challenge became to find other ways to include the city's residents in the RWC festivities.

Within a couple of minutes of the February quake, Richard Stokes, the Christchurch City Council's marketing manager, realised the implications for the city's hosting plans. Even so, the ultimate announcement that the games would be transferred elsewhere still came as a shock.

"Even though we probably all knew the answer, to actually hear it was quite a blow," he said.

Given the traditional ties that the Canterbury province had with rugby, the task of helping the public to feel part of the tournament was essential.

Christchurch people attended the RWC 2011 Roadshow in July, yet inevitably, the city did miss the build-up that the rest of the country experienced.

"People had a lot of other stuff on their minds. We've found that with nearly every event we've put on - that engagement with the event is very late. That certainly happened around Rugby World Cup as well. In the week leading in to Rugby World Cup, after seeing the images of the Tongan community, I know I was thinking, 'Oh crikey, the rest of the country's on to something that's not quite here yet.'"

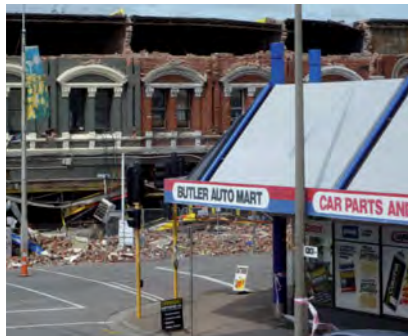
The fan-zone in Hagley Park - originally destined for Cathedral Square - became the new focus of activity. The concept was the same - creating a mini stadium with the big screens - but the new fan-zone missed the vibrancy of the retail and hospitality areas, and lacked the Rugby Road walkway that was planned between the Square and AMI Stadium. As much as possible, the REAL New Zealand Festival and Christchurch Arts Festival activity was held in conjunction with the fan-zone to create a kind of one-stop-shop for rugby and culture.

As Philip Tremewan, Director of the Christchurch Arts Festival, commented: "We timed a lot of shows around the games on the big screen. It wasn't a case of art versus sport - it was a case of art and sport, and people enjoyed them both. It was really about putting a bit of light and warmth, a bit of heart and soul back into Christchurch."

The Arts Festival was rescheduled to coincide with the RWC, and then adjusted further to suit residents' needs. Events were held over a series of weekends during the tournament, instead of nightly over 3-4 weeks, to accommodate people who found it hard to go out at night and make their way around the city. Similarly, the schools' programme was adapted as it was felt that children were tired of being bussed to sites. Instead, storytellers and musicians travelled to schools to perform or hold workshops.

Organisers came up with novel responses to challenges such as cold nights. As Richard Stokes explained: "We had a community fan-zone at QEII Park for 'drive-in rugby'. Like drive-in movies, they could bring their cars and park up and watch the rugby."

However, the Hagley Park fan-zone remained the focus throughout. Without help, the substantial costs involved would have been beyond the council's stretched resources.



"We were hugely appreciative of the help we got from NZ 2011 to allow us to do that, otherwise we would have had to cut back the fan-zone and not operate it right through the tournament.

"We had nights when the big matches were on when we were really chocka, and then some of the mid-week matches when it was really cold and we'd only have 20 or 30 people there. For those big games, there was such a good feeling in there - people just wanting to watch the big games together and enjoying the atmosphere and thinking, 'This is something that will probably never happen again - watching Rugby World Cup games together in the middle of Hagley Park.'"

For the opening night ceremony, performers decked out in the Canterbury rugby colours by way of support. Stokes said this meant a lot to the community.

"The decision to dress the boys at the opening ceremony at Eden Park in a Canterbury rugby jersey was a master stroke in terms of people here - it really hit a note with us."

On weekend mornings there was a junior rugby tournament at the fan-zone, organised in conjunction with the Canterbury Rugby Football Union. Stokes describes the scene: "We had built a mini field and a mini stadium. And at the start of each of those games, we pumped the national anthem in through the speakers. These seven/eight/nine-year-olds would be lined up across the field facing the crowd with the national anthem going. For those kids, that was their test match. So, yes, these were little things - we had our highlights, but in a different way from the people who were in the stadiums with 50,000 people."

Stokes said the visits by overseas teams proved a real tonic.

"We were delighted that the Scottish team came to our fan-zone. They weren't scheduled to, but a number of their team and management came up from Dunedin, and the team had raised about \$78,000 [for earthquake recovery] through dinners and things. The way they engaged with us at the fan-zone was something special."

One sector that has continued to benefit from RWC-related activity has been the Christchurch arts community, with the RWC 2011 Events Village becoming a makeshift cultural centre.

"One of the problems we had post-earthquake was that so many performance venues in Christchurch were no longer operational and our performing arts and events industries were haemorrhaging without things happening. So, with support from [the Ministry of Economic Development], we've got temporary venues in Hagley Park. That's been a lifeline for our events industry and [it] will run through until at least the end of March."

It seems fitting that the seven-metre-high sculpture of the Webb Ellis Cup - originally built in Christchurch and then shipped to Auckland for the opening ceremony - was returned, taking pride of place at the Hagley Park fan-zone. It's still there - a sad reminder, perhaps, of the pivotal role Christchurch was to play in the tournament, but also a tribute to the contribution Canterbury rugby has made to New Zealand rugby and the success of the All Blacks over the years.





A Pacific event

Months before the tournament kicked off, Rugby World Cup Minister Murray McCully stressed that the government was determined to make it a Pacific event, not just a New Zealand one. The 50,000 strong Tongan community in Auckland certainly rose to that challenge.

The Tongans became a very visible part of the tournament even before their team faced off against the All Blacks in the opening match. Some community support was entirely spontaneous, built on the spadework done by the Tonga RWC Komiti⁷² 2011, which was set up in February 2011 and endorsed by the Ministry of Pacific Island Affairs. The 12 committee members came from various sectors - business, creative, community, church, government, and the Tongan media. All were Tongans, said committee chairwoman Rachel Afeaki-Taumoepeau.

“We all came together to go about showcasing the Kingdom of Tonga, not only to the local Tongan community and to the New Zealand public, but to the over 100,000 visitors from around the world,” she said.

The 7,000 Tongans who turned up at Auckland airport to welcome the team on its arrival were the first sign of just how comprehensively that message had been taken on board. More crowds were waiting for the team bus when it arrived in Epsom, said Afeaki-Taumoepeau.

“I was at the Greenwoods Corner community Adopt a Second Team welcome in Epsom and there were about 2,500 people waiting there. I thought what it showed Tongan people was that, from day one, Tongan supporters were consistent, right up to the time the team left.”

⁷² Komiti is the Tongan word for committee.

The welcomes helped set the tone for the tournament and swept aside any doubts and hesitations as to whether the community would embrace the event.

The intensity of the Tongan community involvement was repeated everywhere the team played.

Afeaki-Taumoepeau and her husband went to Wellington for the France vs. Tonga game, where they were part of another warm Tongan welcome.

“Everybody was a Tongan supporter. You were either jumping on the wave of supporting the Tonga team or just a mad rugby supporter. I had so many Tongan friends telling me about their non-Tongan friends who were deciding on a team to support, like people from Denmark coming in and supporting Tonga.”

As the tournament progressed, it came to provide a positive focus for the entire Tongan community.

“I think it was just such a wonderful period where, I believe, even the Tongan community was so elated to be unified and to be celebrating through rugby. I think the brilliant aspect of our Komiti, and the objective of showcasing Tonga, was that it wasn't solely to do with rugby. We were showcasing Tonga via business, via culture, via community and via church. In every centre the team travelled to there was a community church service celebrated by the local community before they left [for the game].”

For Afeaki-Taumoepeau, some of this was latent community pride finally being allowed to bubble to the surface. Some of it was also due to the success of the Adopt a Second Team strategy.

“I think the whole concept of adopting a second team to engage the local community and the schools really did work. The Tongan rugby team donated rugby balls to each of the seven participating schools, and the schools gifted them an artwork.”

The education system both locally and in Tonga worked in unison in that respect, Afeaki-Taumoepeau said.

“There were about 85 school boys from various high schools in Tonga who came over. And they all went to the opening match and the pool game up in Whangarei too - so for them that was such an experience.”

At a business level, the RWC gave this small Pacific nation an opportunity to highlight their local products via the Pasifika Showcase at the Cloud on Auckland waterfront. The four key products at the showcase were watermelon, coconuts, coffee and Heilala vanilla.

Tonga's Ministry for Tourism also launched its new brand at the Cloud at a function attended by a number of business personalities from New Zealand and Tonga. Because the RWC coincided with the regional Pacific Leaders' Forum, business-minded Tongan people were able to mix with political leaders at the event.

The tournament experience enabled Tonga to express important aspects of its identity - to itself, to Auckland, and to the wider world.

“What we'd like to do next year - or the year after - is a celebration of being Tongan in New Zealand, and celebrating successful Tongans across New Zealand, starting with Auckland. By successful Tongans, I mean in business, science, youth development and community. One of our key sponsors has offered to set up a charity to promote local grassroots Tongan rugby in New Zealand and develop teams,” Afeaki-Taumoepeau said.





Let's hear it for the RWC 2011 volunteers

Volunteers turned out in their thousands, injecting energy and thoughtfulness into their work, whether it was greeting visitors, providing directions or assisting with the logistics around the event.

The volunteers were chosen primarily because of their strong customer-focus skills and, for the operational roles in the stadia, on the basis of their experience working in venues and on sports tournaments.

The thoughtfulness of a volunteer in New Plymouth demonstrated just how some members of Team 2011 took the notion of customer service to heart. Knowing that the after-match bus from Taranaki Stadium into town cost a gold coin, one volunteer withdrew money from her own account so that she would have gold coins on hand to give to those who were caught short.

Volunteer Programme Manager at RNZ 2011 Ltd, Brendon Ward, re-told the story: "People would come out and ask her where to catch the bus and she'd say, 'Over there. It costs a gold coin - do you have any money?' and if they didn't, she'd give them a dollar coin."

Ward felt that if volunteers were to be successful, then they themselves needed to have a good experience.

"One of the things I was really strong on, all the way through the process with my team, was that the better we made the experience for the volunteer, the better the experience would be for the spectator or punter. If the volunteers were having a great time, then everyone they touched or served, would have a great time."

The uniform, with its eye-catching teal blue jacket, meant the volunteers were easy to spot among the crowds. For many of the volunteers, collecting the uniform and putting it on for the first time was a high point. The pride in the uniform was widely shared. When Kevin Hales, a volunteer supervisor in Wellington, was asked what it felt like to put on the uniform he replied, "Like I'd just walked on stage."



By tournament's end, all the volunteers had their own special moments to savour.

Stephen Rimene, a volunteer and team leader at Wellington Regional Stadium said: "It was great knowing that every time I put the uniform on, I was about to show the world what New Zealand was like as a host nation. It gave me so much joy to know I was helping visitors to our country. Giving them a lasting impression of what this country is all about and giving them an experience they would never forget."

Like most volunteers, Stephen got his fair share of odd requests.

"But none stranger than a stalker asking me to hold their clothes while they tried to get on the field. Wrong person to ask, I think."

In some respects, the volunteers themselves were the main beneficiaries of the programme. Volunteer Betty-Anne Rutter cited one such example of a woman in her late sixties who had recently lost her husband.

"She lived on her own. She didn't get out much and she didn't have a lot of confidence. She put her name down for this, and she was quite anxious in the beginning but by the end of it, she'd gathered an inner strength. So for her, she will take that into her life. She hadn't caught a bus, or done anything, since her husband died. It took a lot of convincing. When I was looking for volunteers for one of the public training sessions, I phoned this lady and spoke to her, and she was anxious as the training was at Onewa Domain and she'd have to catch a bus to get there. I said to her, 'Come on, you can do this.' At the end of the tournament, she came to me and said it had been wonderful and that she had gained a lot of confidence. You could see that her life was going to be enhanced because she had more self-confidence in her own ability to engage with people," Rutter said.

The enthusiasm and dedication were evident to Brendon Ward as he walked the Auckland Fan Trail from Queens Wharf to Eden Park one evening.

For many of the volunteers, collecting the uniform and putting it on for the first time was a high point.





“The volunteers along the Fan Trail were outstanding. They were giving messages of encouragement like, ‘You’re half way there’ and, ‘Last hill’ and, ‘You’ve only got 15 minutes to go’. There were so many different things that they were doing to make it a more enjoyable and pleasant experience. I also think that sort of thing is infectious. When the volunteers are doing that, and are so visible, you can’t help but get wrapped up in that. You’d have to be a bit of a scrooge to not get into it,” he said.

From the outset, the organisers were mindful of the potential for a sense of let-down once the RWC excitement was over. The participants in the volunteer programme, Brendon Ward said, were encouraged to sign up with VolunteerNet and urged to do other volunteering work in their communities.

“We’ve encouraged people to think about how they can use their skills and experience to benefit themselves and their community. We’ve just done some research in conjunction with Victoria University where we’ve asked people if the experience has given them confidence to go out and find a job, or be interviewed. Youth, in particular, have come back and said that they feel considerably more confident, empowered, and able to go and front up for a job.”

Betty-Anne Rutter is looking at volunteering in the Volvo Ocean Race.

“I certainly wouldn’t hesitate to put my name down as a volunteer again because there are lots of groups in the community that look for volunteers – whether it be a hospice or a sporting event. I’m fairly certain that a lot of people will be encouraged to participate as volunteers in future events,” she said.

In some cases, the contacts made via the volunteer programme became a catalyst for enduring connections. Betty-Anne Rutter said she befriended a couple who were travelling around in a motor home.

“They live in Dubai. He was from South Africa and she was English. They came out for seven weeks for the tournament and they were travelling around in their motor home. I met them at one of the games and I said, ‘Look, when you’re in Auckland again, come and stay. You can park your motor home at our place.’ And they did,” she said.



Environmental responsibility

In 2007, the government agreed that it would work with partners⁷³ to deliver an environmentally-sustainable major event.⁷⁴ An environmental responsibility programme was created to maintain New Zealand’s reputation for good environmental standards by ensuring that New Zealand was a good, responsible host.

The programme was designed to benefit the regions, which could set their own goals based on issues that were relevant to them.

Approach

The purpose of the environmental responsibility programme was to:

- deliver environmental objectives by providing lasting benefits for New Zealand
- deliver an environmentally-responsible major sporting event
- contribute to meeting visitors’ environmental expectations of New Zealand.

The programme focused on the host regions. It tried to promote the use of low-impact modes of transport – such as public transport and walking – to get people to and from stadia. This was taken up by regions, with improvements in public transport, walking routes to stadia, fan trails, and park and ride/walk options.

Steps were also taken to reduce the environmental impact of waste and there were resource improvements at stadia and around the host regions. The energy use at the stadia and training facilities was considered along with the sustainable procurement of goods and services used as part of the RWC or associated infrastructure.

Carbon emissions from flights

Air New Zealand (the country’s national carrier) has high standards in relation to environmental responsibility. Air New Zealand is a world-leader in examining every aspect of flight operations to reduce carbon emissions by saving fuel. They also provide customers with ways to offset their carbon emissions.

Air New Zealand was the supreme winner of the 2012 Energy Efficiency and Conservation Authority Awards for their efforts in this field. The awards celebrate excellence and innovation in energy efficiency and renewable energy in New Zealand.



⁷³ Rugby New Zealand Ltd Ltd, Rugby World Cup Ltd and host regions.

⁷⁴ New Zealand 2011 Office, unpublished report. *Environmental Responsibility Programme for RWC 2011 Final Report.*

During the Rugby World Cup, over 500 tonnes of plastic, aluminium and glass drinks containers and cardboard packaging were collected from around 2500 Love NZ public place recycling bins.



Long-term benefits

Outside of the RWC, the environmental responsibility programme delivered lasting national and regional benefits. These benefits included:

- establishing a credible, environmentally-responsible standard, both for future Rugby World Cups and for large-scale events held in New Zealand
- the development of two greening guides⁷⁵ for future events in New Zealand:
 - *The Greener Events Guide*, which is useful for anyone organising a festival, conference, sports event or similar. It is full of practical tips, resources and information to help ensure events are both successful and environmentally responsible
 - *The Major Event Greening Guide*, which is designed to help organisers ensure their event is both successful and environmentally responsible. It outlines ways to develop and implement an environmental strategy and action plan, and offers practical tips, resources and checklists
- national and regional legacies - for example, improved recycling facilities in host cities
- infrastructure improvements - for example, stadium construction using recycled construction waste and technologies to reduce energy use or improved energy efficiency at stadia as a result of energy audits.

Through visible national programmes (e.g. Love NZ-branded recycling bins), New Zealand demonstrated its commitment to environmental responsibility. Information about some of these initiatives is provided below.

Love NZ: Recycle with Care campaign

The Love NZ: Recycle with Care campaign is designed to encourage recycling in New Zealand. Through the campaign, the number of Love NZ permanent recycling bins nationwide has increased to around 1000 and a further 2000 mobile event recycling bins have been made available for use in sports stadia, concert venues and other public arenas.

During the Rugby World Cup, over 500 tonnes of plastic, aluminium and glass drinks containers and cardboard packaging were collected from around 2500 Love NZ public place recycling bins. That equates to around 118 forty-foot containers of waste collected over a six to eight-week period.

Twenty-seven councils and 18 corporate and industry sponsors have signed on as partners for the programme beyond the RWC 2011.



Living Legends

To celebrate New Zealand's hosting of Rugby World Cup, 17 rugby legends joined thousands of volunteers to plant native trees throughout New Zealand.⁷⁶ As a result of the programme:

- over 85,000 trees were planted during 2011, and 170,000 more are expected to be planted by the end of 2015
- seventeen regions and their communities have got involved
- there has been improved biodiversity and habitats in participating regions.



⁷⁵ The guides are available from the Ministry for the Environment's website: www.mfe.govt.nz/publications/sus-dev/greener-events-guide/index.html

⁷⁶ Living Legends is a joint venture of Project Crimson, an environmental charity with 20 years' experience in community-based native restoration projects, and The Tindall Foundation. It has the support of major sponsors the Department of Conservation and Meridian Energy.

A large sign on a hillside that reads "ALL BLACKS" in white capital letters on a black metal frame. The sign is set against a backdrop of a grassy hillside under a blue sky with scattered white clouds. The letters are bold and blocky, mounted on a dark metal structure that spans across the width of the sign. The hillside is covered in green and brownish vegetation, and the sky is a clear blue with some light, wispy clouds on the right side.

ALL BLACKS

**ALL BLACKS LEGENDS
PLAYED A VITAL ROLE.
ACTING AS AMBASSADORS
FOR NEW ZEALAND, THEY
USED THEIR CONSIDERABLE
PROFILES TO SUPPORT
THE GOVERNMENT'S
INITIATIVES.**



The spin-off for business

The Rugby World Cup showcased New Zealand to the world. And business was primed and ready.

Through a number of programmes and events, New Zealand businesses were able to develop international business links and promote themselves, particularly around the creativity and innovation of some of the country's key industries. These events helped business and industry make the most of the opportunity to market New Zealand as a great place to do business and invest. The New Zealand Government provided support and coordination as required through the NZ 2011 Office and New Zealand Trade and Enterprise (NZTE).



The main focus of the overall business programme, however, was to make connections. Feedback suggests that some useful relationships were initiated, and a number have genuine potential for future growth.

Business events enabled many international visitors to interact with both small and large New Zealand businesses, often in new environments and with new people. For example, beef producers from Argentina, Wales and New Zealand could meet formally and informally, thanks to links made through the 2011 Business Club, an initiative developed by the NZ 2011 Office and NZTE.



All Blacks legends also played a vital role. Acting as ambassadors for New Zealand, they used their considerable profiles to support the government's initiatives. The Ambassadors programme, which was led by ex-All Blacks, was set up before the tournament to promote the RWC and New Zealand business in key overseas markets. Over 140 events were staged during 2010 and 2011 as part of the programme.

Sixteen different sectors also ran their own programme of events, with 250 events held throughout September and October 2011. These events were jointly coordinated and promoted under the REAL New Zealand Showcase brand.

While journalists came for rugby, New Zealand took the initiative to invite international business media to ensure that businesses also benefited from the increased global focus on the country.



Many sectors saw benefits, including agribusinesses, the marine industry and New Zealand's burgeoning superyacht business, the wood industry, the information and communication technology sector, and the aviation industry.



Showcasing New Zealand business to the world

The REAL New Zealand Showcase put New Zealand's businesses and business people centre stage. Through events held across the country, the showcase provided a platform for the business community to enhance sector growth plans and ambitions.

It comprised 16 individual sector showcases that presented more than 250 events. The sectors were agribusiness, marine, aviation, ICT, bioscience, clean energy, forestry, seafood, wine, equine, fashion, music, film, education, rugby and investment.

The sector showcases were run jointly by the NZ 2011 Office and selected industry associations. The NZ 2011 Office provided NZ\$2 million and NZTE gave NZ\$4.2 million to fund the showcases, including the Cloud on Queens Wharf.⁷⁷ Funding was given if applicants could demonstrate that the showcase was sector-led (e.g. the sector was responsible for delivering the programme and controlling content).⁷⁸

Feedback reports from sector organisations indicate that they considered the showcases to have beneficial outcomes for most sectors - in terms of contacts made, exposure generated and activities completed. Showcase participants appreciated the opportunity to promote their industries in ways they considered would be most effective. The general experience was that while many sector bodies had largely been regulatory-based, the showcases offered an opportunity to market their sectors more effectively using the New Zealand silver fern brand. Some sectors combined their events (for example, super-yachts and wine) and this was considered to be a positive move.

The main benefit of the programme is best summarised by a letter sent to the Rugby World Cup Minister Hon. Murray McCully on behalf of the sector leaders, which stated:

Many positive outcomes were driven out of the REAL New Zealand Showcase programme, including the sector leaders working together to share our strategies and programmes and finding joint marketing and promotion opportunities in New Zealand and offshore. This unique onshore effort allowed more businesses within our sectors to participate than when we stage offshore-based promotions. Leveraging off a major event such as RWC 2011 provided opportunity for collaboration across all sectors.

The agribusiness showcase

Agriculture is the backbone of New Zealand's economy and has world-leading farming and food production systems. It was only fitting that the sector had its own unique showcase and programme of events.

Exhibition events were planned throughout the country to maximise opportunities for international visitors to connect with New Zealand agribusiness leaders. The events were supplemented by tailored programmes for specific visitors.

The Waikato Agribusiness Showcase attracted about 60 domestic and international guests. Feedback from the event was positive. As well as meeting international visitors, companies commented on the value of networking with other New Zealand industry players.



⁷⁷ REAL New Zealand Showcase Final Report (p. 2); and NZTE's Rugby World Cup Overview Report (p. 3).

⁷⁸ New Zealand 2011 Office, unpublished report. NZ 2011 Overview Report. pp. 11-12.

The REAL New Zealand Showcase put New Zealand's businesses and business people centre stage.



Many visiting companies and organisations also received tailored tours – like the French agricultural consortia La Maisadour; a British meat processing company, which had a technology tour of New Zealand meat plants; or an Argentinean dairy VIP.

The Manawatu agribusiness showcase tours had a mix of visitors from Argentina, Russia and Brazil. It led to Argentinian interest in investing in the New Zealand dairy industry and in buying New Zealand dairy farm technology. A follow-up farm visit was also arranged by the NZ Angus Society for a leading Argentinian Angus genetics importer.

Winning with Wood Showcase

The New Zealand Forestry and Wood Processing Festival 2011 (Winning With Wood) involved a series of events to promote the whole wood value chain. It culminated in the New Zealand Wood Timber Design Awards in Auckland on 11 October.

The National Wood Innovation Showcase promoted New Zealand as a source of high-quality sustainable wood, wood products and wood technology through websites, the REAL Festival and NZTE offshore offices. It enhanced existing initiatives to raise the profile and value of the forestry and wood processing sector in New Zealand.

Specific events included:

- **The Forest Industries Expo.** It was held just prior to the tournament in Rotorua. It attracted 108 exhibitors and 2,200 trade visitors (including overseas visitors and delegations) over three days. The RWC 2011 and the REAL NZ Showcase provided an opportunity to re-energise the expo that had been cancelled in 2010, resulting in a shift in date and venue. Support events associated with the Expo – including technology clinics – were well attended.
- **The Winning with Wood Showcase.** The event was attended by 70 regional and sector leaders. The Bay of Plenty regional forests and wood processing strategy was launched at the event.
- **The Forestry Industry Conference.** This event in Rotorua attracted 80 attendees. The conference focused on the innovative use of wood in commercial construction. The keynote speaker, Italian earthquake reconstruction expert Paulo Lavischi, spoke at a series of workshops targeting architects in an additional four New Zealand centres.
- **The NZTE Innovation Breakfast.** It attracted 70 people and featured a presentation on the importance of innovation across the whole forest sector value chain.
- **The Forest Industries Training and Education Council (FITEC) Training Awards.** The event in Rotorua attracted a record crowd of 430.

Marine Showcase

The marine industry is one of New Zealand's largest manufacturing industries, with more than \$2.2 billion in annual sales, including export sales of more than NZ\$700 million. It played a leading role in the sector showcase during the Rugby World Cup.

NZ Marine delivered five events during the tournament:

- **The Auckland International Boat Show.** The event was rescheduled to coincide with the Rugby World Cup. It was the centrepiece for showcasing New Zealand's marine industry. It was attended by 16,204 visitors (including exhibitors, VIPs and media), although gate sales were down 20 percent on 2010 sales. There were a record number of exhibitors (210) and estimated sales were approximately NZ\$15-20 million, with a high number of exhibitors reporting qualified leads. The association also reported an increase in media coverage compared to previous years.
- **The Super-yacht Captains Forum.** 140 delegates attended the forum at Auckland's Viaduct Harbour along with 30 speakers from 10 countries, 33 captains and 15 industry sponsors. Closer working relationships were forged with future super-yacht customers. The international media partnership with the Super Yacht Report has meant the New Zealand marine/tourism story has been told globally to key audiences.
- **The International Boat-building Competition.** Six super-yacht industry companies were involved in the event: three super-yacht builders (Alloy Yachts, Fitzroy and Cookson/Southern Spars) and two super-yacht interior companies (Specialist Marine Interiors and Superyacht Interiors New Zealand).
- **The NZ Marine National Yard Tours.** Eleven companies held open invitation yard tours.
- **The Canterbury Marine Festival.** This event replaced the Canterbury Boat Show, which was cancelled due to the Christchurch earthquakes. The festival provided a promotional opportunity for the Canterbury/South Island marine industry, water-related recreational clubs and associates. It was a free event so the Canterbury community could have a go at marine/water-related activities.

The Rutherford Innovation Showcase

The Rutherford Innovation Showcase put the spotlight on New Zealand's information and communications technologies (ICT) industry. The industry includes wireless infrastructure, business productivity software, health IT, transport and logistics technologies, digital content, payments, agribusiness, geospatial, security and communications technology.

The ICT showcase included four new events plus the Canterbury Software Summit, which had been held for the past five years:

- **The Canterbury Software Summit.** 400 delegates attended, up 70 percent on 2010.
- **The Square Kilometre Array Research and Industry Forum.** The Wellington event was organised by NZTE. It attracted more than 100 delegates from academia, engineering, science and technology sectors. International VIPs, media and New Zealand CEOs were hosted at a dinner on 22 September and then at the RWC game of Australia vs. USA on 23 September.
- **Digital Content Forum.** This Wellington event was oversubscribed and attracted over 300 people. The forum had both national and international speakers.





- **Technology Trade and Investment Forum.** Attended by over 250 people, the Auckland-based forum included presentations on the 2011 TIN100 emerging companies. Trade Minister Tim Groser, NZTE Chief Executive Peter Chrisp and NZICT Chairman Bennett Medary spoke about trade, internationalisation, investment and doing business in China and India. An interactive session involved ICT companies from recent China and India trade missions.
- **Future Cities Forum.** The forum showcased how technology will change the way cities are designed and operate. A dinner attended by about 60 people was held at Villa Maria winery in Auckland.



Based on post-event surveys for the events where registration was required, over 80 percent of respondents rated the networking aspect of these events as either good or excellent.

Aviation showcase

The Flair Aviation Trade Show was a new event for New Zealand's aviation industry. About 50 exhibitors displayed products and nine new innovative products were launched at the event. The live public displays over three days were viewed by almost 5,000 visitors, including around 600 international visitors.



In addition to the public displays, 38 workshops and seminars were held with a total attendance of 1,330. The showcase is set to become a biannual event, with the next event scheduled for 2013.

NZ 2011 Business Club

The NZ 2011 Business Club helped form new relationships and networks. It was developed to link business people during the tournament in relaxed and informal environments where locals could host visitors with common interests. Venues and events included a local brewery, dinners and cocktail events.

The registration process for the NZ 2011 Business Club database enabled local businesses to promote events and issue invitations to overseas visitors under the NZ 2011 Business Club name. RSVPs went directly to the New Zealand hosts. In this way, the responsibility for hosting - and for following up on potential business benefits - was devolved to local firms.

The results

Prior to the tournament, RNZ 2011 surveyed offshore ticketholders and found that only 3 percent were interested in doing business in New Zealand.⁷⁹ The Business Club initiated a strategy to convert visitors' interests to business as well as sport and travel.⁸⁰ Thirty percent of respondents to a post-tournament survey of international ticket purchasers indicated that they were quite likely or very likely to return to New Zealand for business.⁸¹

By the end of the RWC, 10,018 people had joined the NZ2011 Business Club, with 4,478 registrations coming from people in other countries.

A total of 552 events were held, resulting in an estimated 20,000 new business connections.⁸² There is representation from 118 countries on the Business Club database.

⁷⁹ New Zealand 2011 Office, unpublished report. *NZ 2011 Overview Report*. p. 10.

⁸⁰ New Zealand 2011 Office, unpublished report. *NZ 2011 Overview Report*. p. 22.

⁸¹ Ministry of Economic Development surveys of international ticket purchasers. The pre- and post-tournament results are not directly comparable as they were different surveys.

⁸² New Zealand 2011 Office, unpublished report. *NZ 2011 Overview Report*. p. 23.

The Business Club legacy

Through the Business Club, there is now a database of 10,000 individuals that can be used by central and local government agencies as well as NGOs, like chambers of commerce or KEA, an organisation that reaches out to expatriate Kiwis and friends of New Zealand.

Business media

A targeted business media programme was developed to showcase New Zealand's economic potential and key industries. It was aimed at strategic trade and investment markets that were either not represented at the RWC or did not have a high rugby profile. Media itineraries included interviews and events with senior sector and business leaders.

Media involved in the programme included CNBC Asia, Dow Jones (Singapore), *21st Century Business Herald* (China), *Business Times* (Singapore), *Expert* (Russia), *RBC Daily* (Russia), *Bisnis Indonesia* (Indonesia), *Daily News and Analysis* (India), *Sanlian Life Week* (China) and Freelance Correspondents. Edelman, a leading international public relations firm, was employed to help develop the programme.

CNBC Asia produced a special programme that put New Zealand in the spotlight. It also showcased interviews with chief executives that were broadcast to almost 400 million homes worldwide, 79 million of which were in Asia-Pacific. CNBC's feature programme *Managing Asia* screened a special series where four New Zealand CEOs shared their game plan on how to charge ahead in business.

The programme developed with Edelman showcased key sectors, raising their profile in the targeted markets and building New Zealand brand awareness in China, India, Singapore, Indonesia and Russia.

Commercial VIPs

The commercial VIP programme identified very senior and influential visiting business people and connected them to business people in New Zealand.

It proactively targeted individuals and groups representing trade and investment opportunities, primarily via NZTE's offshore network, or through relationships with RWC travel agencies, and local companies.

More than 400 visiting business people participated in the programme and 16 targeted events were organised, including:

- dinners with selected international and local guests, hosted by ministers and senior local business people
- large networking events at the Cloud
- networking events at the Waka Māori and other venues.





Both the Cloud and the Taste at the Cloud festival gave businesses an opportunity to meet with small groups of international business people and to sell the New Zealand story. Over 146 tours were undertaken with a wide range of international business people.

The programme also involved embassies, high commissions and trade promotion agencies from participating countries to help promote opportunities for visiting nationals and companies. Of the 20 rugby teams participating, specific projects were undertaken with six trade promotion agencies representing 10 teams.



The NZ 2011 Office also hosted four larger functions in Auckland, including:

- **The NZ 2011 Ambassadors Function at the Cloud.** The event was hosted by Minister Murray McCully and was attended by the NZ 2011 Ambassadors and over 250 international and domestic business guests.
- **Investing NZ.** Finance Minister Bill English and New Zealand Superfund Chief Executive Adrian Orr hosted an event on investing in New Zealand. More than 80 international and domestic guests attended.



The First Impressions online training programme

The Rugby World Cup created the impetus for many businesses to hone their customer relations skills. It also provided an important reminder that thousands of New Zealanders are already personal ambassadors as they deal with international visitors every day.

The NZ 2011 Office worked with the RWC 2011 volunteer programme team to adapt their volunteer online training tool First Impressions for the event.

The online training programme was made available to frontline organisations in sectors such as retail, hospitality and transport. It helped participants polish their customer service skills and provided information about the customs, culture and languages of visiting teams and fans. The programme also provided information on New Zealand and informed users about the REAL New Zealand Festival, showcase events and activities running alongside the tournament.

The free programme took about two hours to complete, but its modular design meant participants could log on and off as time and work commitments allowed. Ultimately, 4,613 people completed the course.

The success of the programme has meant it will continue to be used. For example, secondary school tourism students are offered the training by the Aviation, Tourism and Travel Training Organisation. Students can gain three unit-standard credits towards an NCEA tourism qualification by completing the training and a related worksheet.

In addition to the online training, the programme Match Ready was developed to assist businesses in the tourism, hospitality, transport, accommodation, retail and services sectors get ready for the RWC. The website provided practical actions such as staff training, consent and licensing advice and business tips.

Match Ready had over 4200 visits with over 12,300 page views between 8 June and 23 October 2011.

E-tendering portal

A website was set up in 2009 to make procurement opportunities related to the RWC easily accessible to New Zealand businesses. Regional and national partners involved in delivering the tournament (and supporting activity) loaded tenders on the site, with opportunities ranging from signage to hospitality or promotional events for the national REAL NZ Festival. Forty-five requests for expressions of interest, proposals and tenders were loaded on the site between 9 September 2009 and 15 July 2011.

The online training programme helped participants polish their customer service skills and provided information about the customs, culture and languages of visiting teams and fans.



The Romanian rugby team try their hand at performing a haka while in Southland.



PART C:

Behind the Scenes

Supporting information

About this section

This section provides more information about the research and data used in the preparation of this report.

Advice from the Chief Economist

The Ministry of Economic Development's Chief Economist provided the following advice on economic impacts.

While the benefits of an event like the RWC may be substantial, considerable judgement needs to be applied to the quantitative assessment of their effects to reach a judgement about the overall benefit of the event to the economy.

Ideally, a fit-for-purpose assessment of a major event – or any other intervention – will be a cost-benefit analysis (CBA), which will measure additionality at the national level. If the project is substantial, it will have involved general equilibrium considerations. It will always distinguish clearly between additional costs (relating to actual resource use in the economy, reflecting the best alternative uses that the resources could be put to) and additional benefits resulting from the project, both defined in relation to a clear counterfactual. It will assess real resource impacts and not fiscal or financial effects, the analysis of which may be required, but which involve different elements.

In New Zealand, the Treasury has identified that CBA is the appropriate framework where the public sector is assessing:

- (i) the impacts, outcomes or objectives achieved or contributed to by its actions, and
- (ii) the cost effectiveness of the interventions that it delivers or administers.

Treasury note that CBA should consider impacts across all sectors of the economy by thinking about the inter-relationships between sectors and capture all benefits and costs regardless of to whom they accrue. This implies a range of techniques may be needed to undertake a full and defensible CBA (e.g. computable general equilibrium modelling to consider the impact across all sectors), but these are part of/inputs to a CBA, not alternatives to it.

Impact of the Rugby World Cup 2011

New Zealand's selection by the International Rugby Board to host the 2011 RWC imposed certain costs on the country that would have not been incurred if the event had been held elsewhere. Most of these related to infrastructure – construction of sporting facilities in particular, which provide services over decades and not just during the period of the RWC. Costs were mainly incurred by central government and local government.

Benefits were mainly related to additional non-residents visiting New Zealand to attend the RWC. They spent foreign exchange on goods and services, leading (other things being equal) to an increase in GDP. At the same time, other tourists may have decided not to travel to avoid higher prices and congestion associated with the RWC.

The first issue is assessing the net amount of this additional expenditure. This can be done by attempting to estimate what "normal" tourism spending would be, and comparing it with the actual expenditure. This is not without its difficulties.

Some approaches to estimating the impacts of major events start with all associated expenditures – capital and operating costs, and receipts from additional tourism – and multiply these expenditures up using assumptions about further expenditures undertaken by those who receive the initial spending as income. This approach, usually known as "economic impact analysis" results in misleadingly large estimates of impact for two reasons:

- not distinguishing between costs – resources that could be used for other valuable purposes – and benefits arising from additional resources from overseas, and
- assuming that unemployed resources are available to meet all additional demands for goods and services.

Treasury guidance requires an assumption of full employment as a starting assumption, so issues of displacement and additionality must be directly confronted in the analysis – including the costs and benefits of additional employment. CGE and input-output analysis can be helpful in examining linkages within the economy, and modelling quantity and price responses of the event if it is large in relation to the economy as a whole. To assess the net economic benefit, the CBA framework needs to be applied so that all relevant costs and benefits are considered.

An important modelling restriction is to assume that the economy both begins and ends at full employment (except in exceptional circumstances that can be ignored in practice). Governments' fiscal and monetary policy settings aim to maintain the economy at or near full employment. A well-constructed CGE model will be calibrated on this basis and estimate employment displacement effects. However, input-output analysis lacks this sophistication.

If there are spillover effects of the event, which will tend to lead to economic benefits over time (for example, word-of-mouth effects from additional visitors telling their friends that New Zealand is a great place to holiday, and who subsequently take their advice) and, if the net benefits of these spillovers can be quantified, these should also be estimated and included.

Roger Procter

Chief Economist, Ministry of Economic Development

Economic impacts analysis

This analysis was prepared for the Ministry of Economic Development by consultants Market Economics in conjunction with Gravitas and Sapere Research Group.



Introduction and key issues

This analysis summarises the economic impact of the RWC 2011 on the New Zealand economy. To quantify the impact, Market Economics (ME) has identified the key stakeholders that played a role in delivering the event, and estimated the effects of their combined activities and associated expenditure throughout the economy. The key stakeholders were the tournament organisers, teams and officials, the commercial partners (broadcasters, sponsors, worldwide partners, master licence holders, suppliers), national and international media, facility providers (including stadiums, central and local government entities), and the core spectator groups, (including businesses hosting clients and staff, international visitors to New Zealand and domestic spectators).

Based on this understanding of the event's structure, ME has gathered information from the stakeholders on their RWC-related operational and capital expenditure (over the years leading up to and including the tournament and by location across the country) and looked at how that expenditure was funded. The expenditure and activity data was analysed using ME's national computable general equilibrium (CGE) model.

Key assumptions

The data gathered for this study, which provides the inputs for the economic impact modelling, is extensive and is drawn from a range of sources. Information has been gathered from key stakeholders using in-depth interviews, including wherever possible access to activity and expenditure data.

Expenditure by other stakeholder groups – such as international media, the teams, and international and domestic visitors travelling to and within New Zealand for the event – has been estimated based on targeted surveys⁸³ and a range of other data sources.⁸⁴ To support the expenditure estimates, detailed analysis was undertaken about the travel activity patterns of the teams, spectator activity around matches, and travel activity by international visitors and by domestic match attendees. The calendar of matches by location, and the training and match-related itinerary of the teams, provides a central framework for the data gathering and analysis.

The expenditure information has been analysed and cross checked (where possible) within the time available. The data which was directly provided to ME by key stakeholders is robust. However, some stakeholders were able to provide only limited information, meaning there is limited robust information on some expenditure in New Zealand.⁸⁵

⁸³ Carried out by Gravitas Research and Strategy Limited in conjunction with ME.

⁸⁴ Other key data sources include use of ticket sales data, tourism statistics (IVA, IVS), the Ministry of Economic Development's survey of international ticket holders and customised electronic transaction data provided by BNZ Marketview (and Paymark).

⁸⁵ Commercial sensitivity is often a reason for withholding information and this is a common obstacle for economic impact studies. There is also no obligation for stakeholders to provide the information.

The main gaps in the expenditure data are:

- the operational costs faced by the sponsors and worldwide partners (alternative estimates of their international hosting and in-stadium hospitality activity have been derived from ticket and package sales patterns) and tourism and hospitality service providers
- the implementation costs of the in-stadium official hospitality programme and general operational costs of Rugby Travel and Hospitality Ltd
- international broadcaster costs (excluding their payments made to the official broadcaster and personnel-based expenses, which have been captured/estimated)
- the commercial licensing fees paid by official tournament sponsors and suppliers, insofar as these related to New Zealand-based companies making these offshore payments.

In order to develop estimates of the total expenditure patterns to be used in the economic modelling, ME has applied known expenditure patterns and ratios within stakeholder groups (for example, across host region consortia where commonly required match-related activities in the stadiums were provided by some, but not all), and estimates of expenditure associated with identifiable activity patterns around the event. ME considers these assumptions are appropriate based on their understanding of this event, and their experience with analysing large-scale events and the tourism and leisure industry. The core assumptions that potentially have a significant effect on the economic impact results are as follows:

- The full cost of the redevelopment/development of stadia and new stadia facilities⁸⁶ has been attributed to the RWC 2011 – i.e., it is assumed that these capital projects would not have taken place in the short to medium term future in the absence of the tournament.
- The purchase of Queens Wharf in Auckland has been excluded but the structural works carried out post-purchase have been attributed to the tournament and included.
- All non-Auckland⁸⁷ host region expenditure has been treated as local government expenditure – i.e., the regional consortia generally included local tourism, economic development, rugby unions, stadia, regional and local government agencies but, by and large, the majority of costs or funding was sourced from local government and, in most cases, local government was also the full or part owner of the stadia and training facilities.
- For all private businesses, it is assumed that expenditure specific to the RWC was outside of their normal operation and the additional expenditure was funded by taking a reduced operating surplus (profit). That is, it was not part of “business as usual” annual spending.
- International visitors are estimated at 157,750. This is based on the detailed analysis of information from the ticket sales database together with data from core providers of ticket-and-travel packages and hospitality packages.⁸⁸ However, some international travellers who would otherwise have visited New Zealand during the RWC period were discouraged from visiting because of the event. This was in the order of 40,000 persons.⁸⁹ The net addition in international visitor numbers is in the order of 117,750 (115,000-120,000).

⁸⁶ Stadia developments attributed to the tournament include Eden Park, Forsyth Barr (Dunedin), AMI Stadium (Christchurch), Toll Stadium (Whangarei), North Harbour Stadium (media tower), Trafalgar Park (Nelson), Waikato Stadium (Hamilton) and other smaller capital projects at other facilities.

⁸⁷ In the Auckland region, the hosting activities of the Auckland Council Group and the two stadiums have been identified separately.

⁸⁸ While the total international visitor count from these sources (157,750) is greater than the Statistics New Zealand estimate (133,000) based on arrival card counts of those who identified that they were here for the RWC, we note that not all flights in the period around the RWC were issued with arrival cards which sought that data, not all international visitors used commercial services, and there is an unknown non-response rate to the RWC question on arrival cards.

⁸⁹ Ministry of Economic Development estimate based on comparison of trends in arrivals.

- The RWC also affected international outbound travel by New Zealand residents, with a very significant downturn in outbound numbers in the September-October period (in the order of 45,000-50,000 travellers). As a consequence, not all of the ticket and hospitality expenditure by New Zealand households and businesses can be seen as simply a transfer of spending within the economy. Rather, a significant amount was expenditure diverted away from international travel and instead into the New Zealand economy.⁹⁰
- The longer term effects on international travel are unknown yet – specifically whether those international visitors discouraged by the RWC simply changed the timing of their travel to New Zealand (in which case the net impact of the RWC may be understated), and New Zealand residents still travelled internationally at some other time (in which case the RWC net impact may be overstated).

Medium-run economic impacts

Using the data gathered on RWC-related expenditure (and associated funding information), ME have analysed the medium-term impacts of the RWC on New Zealand’s economy using CGE methodology. The key purpose of applying a CGE method is that it considers the impacts of the years leading up to and including the tournament (essentially the ‘spending’ years contributing to short-run impacts) and also the subsequent years when the impacts of that spending are played out in the economy (i.e., when the repayments of loans used to fund large capital projects are taken into account).

Overview of CGE methodology

CGE models have been widely used by economists to assess the medium to long-run economic implications of major sporting events (e.g. the Melbourne 2006 Commonwealth Games and the 2000 Sydney Olympics). CGE models quantitatively describe how agents within an economy (businesses, government, households and importers/exporters) simultaneously interact when stimulated by a major event. They explicitly account for the efficiency-maximising behaviour of firms, the utility-maximising behaviour of households, while ensuring that household and government budgetary constraints are met. By simulating the decision-making processes of these agents, CGE models show the economic implications of sporting events in terms of changes in gross domestic product (GDP), employment, government revenue and spending, savings, investments and balance of trade.

Underpinning CGE models are detailed and comprehensive databases of the transactions that occur within an economy including those that occur during the event. The CGE model used in this study is based on the latest available national accounts from Statistics New Zealand. It is a static (single period) and multi-regional (covering Auckland and rest of New Zealand economies) model with fixed endowments of factors of production.

Further to the overriding assumptions outlined above, core assumptions relied upon for the ME CGE analysis are:

- The CGE model is based on the 2007 year, as this is the date of the most recent inter-industry transaction table released by Statistics New Zealand. Data has been deflated to 2007 dollar terms using appropriate producers price index (PPI) and consumers price index (CPI) deflators. The implication of this is that the results are also expressed in 2007 NZ\$ and 2007 employment terms.
- Related to the above, a limitation of the CGE model is that the economic structures implicit in the model (that is, the way in which the national economy works) reflects the economy as at 2007 and is therefore before the global financial crisis (GFC). The structure of the New Zealand economy has changed as a result of the GFC and, furthermore, by the Christchurch earthquakes. Without further work and updated datasets from Statistics New Zealand (currently unavailable) it is unknown what implication these changes might have on the RWC economic impact results.

⁹⁰ Average spending per New Zealander travelling overseas is around \$3,000 (NZSNA, 2011).

- There are many scenarios under which the CGE can be run. According to a Cambridge University Report: “Factor mobility assumptions are a useful way to categorise CGE model results as describing short-run, medium-run or long-run adjustments to economic shocks. In the short run, some factors – usually capital – are immobile and the economy’s production response is therefore limited. Analyses of long-run adjustment assume that all factors are fully mobile and, in addition, long-run changes in factor supply and productivity occur.”⁹¹ For this study, ME have adopted a ‘medium-run CGE closure’ scenario. In broad terms, this scenario assumes the changes in the factors of production are limited (constrained) by their price and that the rates of investment and household consumption are assumed to be fixed. This scenario also assumes that the government balances its budget.
- These assumptions do not define a fixed period of time. That is, it is not possible to pinpoint the future year in which the following CGE results apply.

Medium-run impact results

The CGE modelling shows that hosting the RWC would result in a medium-term net expansion of the New Zealand economy in the order of 0.34 percent, equating to NZ\$₂₀₀₇ 573 million of gross domestic product (GDP). That is, the New Zealand economy would grow as a result because of the net direct and flow-on expenditure by organisers, government, spectators, sponsors, teams and media. It would have a slightly greater medium-term impact on the labour market, in the order of 0.35 percent or sustaining around 7,840 MEC⁹² 2007 years.⁹³

Table 7: Net economic impacts – medium term

Increase in real GDP 2007 NZ\$ (m)	\$573
Increase in real GDP	0.34%
Increase in labour MEC ₂₀₀₇ Years	7,840
Increase in labour	35%

Short-run economic impacts

Using the data gathered on RWC-related expenditure (and associated funding information), M.E have analysed the short term impacts of the RWC 2011 Tournament on New Zealand’s economy using an Input-Output (IO) methodology. While the tournament itself was eight weeks long from teams’ arrival to final team departure, the short term impacts capture annual operational and capital expenditure activity from the year ending June 2006 (when first expenditures occurred) through to the year ending June 2012.

Overview of Input Output Methodology

At the core of any IO analysis is a set of data that measures, for a given year, the flows of money or goods among various sectors or industrial groups within an economy. These flows are recorded in a matrix or ‘IO table’ by arrays that summarise the purchases made by each industry (its inputs) and the sales of each industry (its outputs) from and to all other industries. By using the information contained within such a matrix, IO practitioners are able to calculate mathematical relationships for the economy in question. These relationships describe the interactions between industries, specifically, the way in which each industry’s production requirements depend on the supply of goods and services from other industries. With this information it is possible to calculate, given a known influx of tourists or increases in capital spending, all of the necessary changes in production that are likely to occur throughout supporting industries within the wider economy. For example, if one of the changes is a surge in restaurant spending, then the IO model would calculate all of the additional output that would also occur in industries supporting the restaurant industry (e.g. food producers, electricity providers, kitchen equipment manufacturers), as well as the industries that, in turn, support these industries.

⁹¹ Burfisher, M.E. (2011). *Introduction to Computable General Equilibrium*, Cambridge University Press, New York.

⁹² MEC or “modified employment count” is the ME calculation of employment that takes into account both non-employee working proprietors (NEWP) and the employee count (EC) identified by Statistics New Zealand. The Statistics New Zealand LEED data shows that the NEWP component accounts for about 12 percent of the total workforce (2011).

⁹³ An MEC year refers to sustaining one MEC (job – whether full or part time) for the duration of one year. The results are expressed in 2007 MEC equivalents.

As with all modelling approaches, IO analysis relies on certain assumptions for its operation. Among the most important is the assumption that the input structures of all industries (i.e. technical relationships) are fixed. In the real world, however, technical relationships will change over time as a result of new technologies, relative price shifts causing substitutions, and the introduction of new industries. For this reason, IO analysis is generally regarded as most suitable for short-run analysis, where economic systems are unlikely to change greatly from the initial snapshot of data used to generate the base IO tables.

All expenditure data gathered from spending stakeholders in the event has been coded by year, location and to one of the 48 sectors that make up the economy. This allowed the IO model to estimate changes in final demand and allow for reductions in the spending that stakeholders within the economy would have ordinarily made. This ensures the who pays question is answered fully by the modelling.

Further to the overriding assumptions outlined above, three core assumptions are specifically relied upon for the M.E IO analysis as follows:

- The IO model is based on the 2007 year, as this is the date of the most recent inter-industry transaction table released by Statistics New Zealand. Data has been deflated to 2007 dollar terms using appropriate PPI and CPI deflators.
- Unless otherwise advised, it has been assumed that capital expenditure that is not funded by grants is funded over the long term by a loan structure.⁹⁴ This assumption therefore excludes the possibility that capital projects were funded from accumulated savings.
- For central, local government and households, operating expenditure related to the Tournament has been offset by a decrease in the consumption of final demand. This decrease has been distributed, *pro-rata*, across the industries of the economy according to the underlying (2007) final demand patterns for those agents (i.e., the way in which those agents purchase goods and services in a normal (non RWC) year).

Short-run impact results

The IO modelling shows the RWC 2011 Tournament results in a short term net expansion of the New Zealand economy (total value added over the 2006 to 2012 period) in the order of \$₂₀₀₇1,730 million. That is, the economy grew as a result of hosting the RWC 2011 because of the direct and flow-on effects of more money being spent *in* New Zealand than being spent *out* of New Zealand, as well as the greater flow-on effects of increased spending on RWC related activities compared to the decrease in normal spending in the economy.

Expressed in employment terms, the RWC 2011 Tournament resulted in a short term impact on the labour market (jobs) over the same time period in the order of 29,990 MEC₂₀₀₇ years.⁹⁶ That is, in total the Tournament sustained the equivalent of 22,890 jobs for the duration of one year.

	Up to 2009	2009	2010	2011	2012	Sub Total
Value Added* NZ\$ ₂₀₀₇ (m)	\$(16)	\$48	\$270	\$432	\$996	\$1,730
Jobs MEC ₂₀₀₇ Years	70	700	3,780	6,190	19,260	29,990

These impacts will be offset in the longer term by the repayment of loans used to fund the capital development projects required to deliver the Tournament, or future reduced spending by both government and businesses in response to their spending on RWC 2011 related activities. The net additional impact, accounting for these repayments and reductions in spending, is captured in the medium run results described above.

⁹⁴ All loan repayments have been based on a 6.0% per annum compounding interest rate, spread over a 25 year period.

⁹⁵ MEC is the M.E calculation of employment which takes into account both non-employee working proprietors (NEWP) and the employee count (EC) identified by Statistics NZ. The Statistics NZ LEED data shows that the NEWP component accounts for about 12% of the total workforce (2011).

⁹⁶ An MEC year refers to sustaining one MEC (job - whether full or part time) for the duration of one year. The results are expressed in 2007 MEC equivalents.

Conclusion

The timing of the tournament (and associated build-up) - coinciding with the global recession and the contraction of the New Zealand economy - adds to the significance of the event's short-term economic impacts. At a time when the labour market was in decline, the RWC sustained valuable jobs and stimulated export earnings. Longer term, the impacts of the tournament on the New Zealand economy are less once repayments and reduced future spending offsets the short-term gains. The medium-term economic impacts, as covered in the scope of this study and described above, are however reasonably significant. Importantly, these economic outcomes form one part of a wider set of national impacts resulting from hosting the RWC, not all of which can be quantified.

Match attendance

Total attendance: 1,475,688 (RNZ 2011 Ltd)

Total international ticket sales: 331,801 (RNZ 2011 Ltd)

Reported New Zealand sales: 952,000

Implied RWCL tickets: 191,887 (calculated based on above information)

MATCH	TEAMS	VENUE	ATTENDANCE
1	Tonga vs. New Zealand	Eden Park	60,214
2	Romania vs. Scotland	Rugby Park Stadium	12,592
3	Fiji vs. Namibia	Rotorua International Stadium	10,052
4	France vs. Japan	North Harbour Stadium	28,519
5	England vs. Argentina	Otago Stadium	27,477
6	Australia vs. Italy	North Harbour Stadium	25,731
7	Ireland vs. USA	Stadium Taranaki	20,823
8	South Africa vs. Wales	Wellington Regional Stadium	33,331
9	Samoa vs. Namibia	Rotorua Stadium	12,752
10	Tonga vs. Canada	Northland Events Centre	17,174
11	Scotland vs. Georgia	Rugby Park Stadium	10,267
12	USA vs. Russia	Taranaki Stadium	13,931
13	New Zealand vs. Japan	Waikato Stadium	30,484
14	Argentina vs. Romania	Rugby Park Stadium	12,605
15	South Africa vs. Fiji	Wellington Regional Stadium	33,262
16	Australia vs. Ireland	Eden Park	58,678
17	Wales vs. Samoa	Waikato Stadium	30,804
18	England vs. Georgia	Otago Stadium	20,117
19	France vs. Canada	McLean Park	14,230
20	Italy vs. Russia	Trafalgar Park	12,415
21	Tonga vs. Japan	Northland Events Centre	17,364
22	South Africa vs. Namibia	North Harbour	26,839
23	Australia vs. USA	Wellington Regional Stadium	33,824
24	England vs. Romania	Otago Stadium	25,687
25	New Zealand vs. France	Eden Park	60,856

Table 9: Match attendance figures

MATCH	TEAMS	VENUE	ATTENDANCE
26	Samoa vs. Fiji	Eden Park	60,327
27	Ireland vs. Russia	Rotorua Stadium	25,661
28	Argentina vs. Scotland	Wellington Regional Stadium	26,937
29	Namibia vs. Wales	Taranaki Stadium	14,710
30	Japan vs. Canada	McLean Park	14,335
31	USA vs. Italy	Trafalgar Park	14,977
32	Georgia vs. Romania	Arena Manawatu	13,228
33	Samoa vs. South Africa	North Harbour Stadium	29,754
34	Australia vs. Russia	Trafalgar Park	16,307
35	France vs. Tonga	Wellington Regional Stadium	32,763
36	England vs. Scotland	Eden Park	58,213
37	Argentina vs. Georgia	Arena Manawatu	13,754
38	New Zealand vs. Canada	Wellington Regional Stadium	37,665
39	Wales vs. Fiji	Waikato Stadium	28,476
40	Ireland vs. Italy	Otago Stadium	28,027
41	QF1: Ireland vs. Wales	Wellington Regional Stadium	35,787
42	QF2: England vs. France	Eden Park	49,105
43	QF3: South Africa vs. Australia	Wellington Regional Stadium	34,914
44	QF4: New Zealand vs. Argentina	Eden Park	57,912
45	SF1: France vs. Wales	Eden Park	58,629
46	SF2: New Zealand vs. Australia	Eden Park	60,087
47	Bronze final: Australia vs. Wales	Eden Park	53,013
48	Final: New Zealand vs. France	Eden Park	61,079
Total attendance			1,475,688

Survey of international ticket purchasers

The Ministry of Economic Development surveyed overseas ticket purchasers to get feedback on their experience in New Zealand. The database of overseas resident ticket purchasers was provided by RNZ 2011 in late 2011. The database contained 37,645 records,⁹⁷ from which an invitation to participate in the survey was sent to 37,156 unique ticket purchasers. Of these, valid responses were received from 12,259 respondents, resulting in a response rate of 33 percent.

Q1: During which part of the tournament did you attend Rugby World Cup 2011?

STAGE	DISTRIBUTION
Pool stage	51%
Knockout (quarters, semis and finals) stage	21%
Both pool and knockout stages	29%

Q2: How many trips did you make to New Zealand for the Rugby World Cup 2011?

NUMBER OF TRIPS	DISTRIBUTION
One trip	88%
Two trips	8%
Three trips	2%
Four or more trips	2%

Q3: How many nights did you stay in NZ on RWC trip(s)*

LENGTH OF STAY	DISTRIBUTION
0 to 2 nights	3%
3 or 4 nights	8%
5 or 6 nights	6%
7 to 9 nights	8%
10 to 13 nights	14%
14 to 16 nights	11%
17 to 20 nights	14%
21 to 27 nights	14%
28 to 34 nights	9%
35 or more nights	13%

*groupings can be recalculated if required.

Q4: Which of the following statements best describes your visit to New Zealand for the Rugby World Cup 2011?

REASON	DISTRIBUTION
Plans coincided with the RWC	11%
Altered planned travel to New Zealand in 2011/12 to coincide with the RWC 2011	13%
Came specifically for the RWC	76%

⁹⁷ The database captured customers purchasing tickets through RNZ 2011's online sales system. The database did not capture customers who bought tickets through other providers nor those that acquired tickets outside of this system (for example, through the official Travel and Hospitality Programme).

Q5: Satisfaction with New Zealand (rating 1: low to 10: high)				
REASON	MEAN	STD. ERR.	[95% CONF. INTERVAL]	
Overall value for money while in New Zealand	7.0	0.02	7.0	7.1
Overall customer service experience in New Zealand	8.7	0.01	8.6	8.7
Information on travel in New Zealand	8.6	0.01	8.6	8.6
Māori cultural experiences	7.8	0.02	7.8	7.9
Queens Wharf fanzone and the Cloud	7.7	0.02	7.7	7.7
Ease of doing business in New Zealand	8.1	0.02	8.1	8.2
Festival events (e.g. the REAL NZ Festival)	7.8	0.02	7.7	7.8

Q6: Recommend New Zealand as a holiday destination	
Very unlikely	3%
Quite unlikely	1%
Neither likely nor unlikely	2%
Quite likely	9%
Very likely	83%
Don't know	0%
NA	0%

Q7: Return to New Zealand for a holiday		Q8: Return to New Zealand for business	
Very unlikely	4%	Very unlikely	6%
Quite unlikely	3%	Quite unlikely	6%
Neither likely nor unlikely	4%	Neither likely nor unlikely	12%
Quite likely	17%	Quite likely	10%
Very likely	69%	Very likely	20%
Don't know	2%	Don't know	8%
NA	1%	NA	38%

Note that the response rate to this question is comparable to other response rates. However, given that the survey was not targeted at business visitors, it is difficult to interpret the neutral and negative responses.

Q9: Overall enjoyment from attending the Rugby World Cup (rating 1: low to 10: high)				
REASON	MEAN	STD. ERR.	[95% CONF. INTERVAL]	
New Zealand's hosting of the Rugby World Cup	9.1	0.01	9.1	9.1
Rugby World Cup match venues	8.7	0.01	8.7	8.8
Quality of Rugby World Cup tournament information	8.9	0.01	8.9	9.0
Rugby World Cup ticketing	8.1	0.02	8.1	8.2

Q10: Contribution of volunteers to your experience of the Rugby World Cup (rating 1: low to 10: high)				
REASON	MEAN	STD. ERR.	[95% CONF. INTERVAL]	
Contribution of volunteers to your experience of the Rugby World Cup	8.9	0.01	8.9	8.9

For weighting and estimation purposes, 188 records with missing or invalid email addresses were included with the 37,156 ticket purchasers invited to participate in the survey. That is, a total of 37,344 records were retained for weighting purposes, as summarised in table 10 below.

Table 10: Overseas ticket purchasers and sample composition by country		
COUNTRY/COUNTRY GROUPING	DATABASE POPULATION	ACHIEVED SAMPLE
Argentina	664	282
Australia	13,458	4,030
Canada	1,181	414
United Kingdom – England, Northern Ireland, Scotland, Wales ^A	8,468	2,391
France	2,332	911
Ireland	2,308	561
Italy	227	103
Japan	787	401
South Africa	1,774	518
USA	2,401	623
Other RWC participant countries – Fiji, Georgia, Namibia, Romania, Russia, Samoa, Tonga	186	60
Brazil	82	30
Chile	127	45
French Polynesia	68	36
Germany	353	81
Hong Kong	377	99
Malaysia	119	42
Netherlands	204	60
New Caledonia	154	92
Singapore	511	133
Spain	194	97
Switzerland	237	75
United Arab Emirates	181	59
Other RWC non-participant countries	951	363
Missing ^B	0	753
Total	37,344	12,259

A. Individual countries that comprise the United Kingdom had to be aggregated because the original ticket purchaser database overwhelmingly recorded "United Kingdom", as distinct from identifying specific countries within the United Kingdom.

B. Due to 753 survey responses providing either no country of residence or in insufficient detail to classify, these responses were assigned the overall mean weight ($=37,344 / 12,259 = 3.046$), and weights for other countries specified in this table adjusted accordingly so the sum of weights equalled the ticket purchaser database total of 37,344.

International visitors

Table 11: International visitors by participating countries

RWC PARTICIPANT COUNTRIES	HERE FOR THE RWC		NOT HERE FOR THE RWC	
	AVERAGE LENGTH OF STAY	NUMBER OF VISITORS	MEAN INTENDED	TOTAL ARRIVALS
Australia	8.0	55,152	9.2	333,184
France	18.9	11,136	42.4	5,888
UK	19.9	9,232	29.2	17,792
South Africa	12.7	8,336	27.9	4,480
England	23.0	6,752	34.6	15,408
USA	14.5	5,312	19.7	37,696
Combined Ireland	22.3	4,336	36.0	3,728
Argentina	15.5	2,992	20.7	1,920
Japan	8.4	2,736	19.7	16,672
Canada	18.5	2,560	28.0	8,880
Fiji	19.9	1,440	37.3	5,216
Scotland	26.9	944	31.2	1,536
Wales	24.8	880	40.3	512
Italy	17.3	848	23.2	2,464
New Zealand	13.3	752		
Samoa	17.6	608	22.3	4,064
Tonga	25.0	544	26.1	3,472
Russia	15.3	368	60.6	848
Namibia	5.3	96	21.7	48
Georgia	13.7	48	81.0	32
Romania	26.0	48	40.6	192

Table 12: International visitors by non-participating countries

RWC PARTICIPANT COUNTRIES	HERE FOR THE RWC		NOT HERE FOR THE RWC	
	AVERAGE LENGTH OF STAY	NUMBER OF VISITORS	MEAN INTENDED	TOTAL ARRIVALS
Hong Kong (SAR)	9.0	1,520	18.1	6,208
United Arab Emirates	15.3	800	18.7	2,464
Germany	31.0	784	80.6	13,360
New Caledonia	9.2	784	10.0	4,112
Malaysia	11.2	704	18.0	10,288
China, People's Republic of	16.2	608	21.7	39,184
French Polynesia	9.7	528	13.2	3,936
Switzerland	20.7	528	50.0	2,896
Netherlands	21.8	496	42.8	3,712
Other	17.4	6,224		

*Analysis based on sample of arrival cards.

Marae team welcomes

Marae across the country opened their doors to officially welcome teams from around the world to New Zealand for the Rugby World Cup.

From heartland New Zealand in the rural provinces to the biggest cities, New Zealanders stood together to *pōwhiri* (welcome) the world. This was the first time Rugby World Cup teams and visitors were welcomed to a host country in this way.

Marae team welcomes demonstrated the unique impact Māori had on New Zealand's hosting of the the Rugby World Cup. The 15 marae that officially welcomed teams from around the world to New Zealand for the Rugby World Cup 2011 are listed below.

Table 13: Marae team welcomes

TEAM	REGION	HOST MARAE
Canada	Northland	Waitangi Treaty Grounds
IRB match officials	Northland	Waitangi Treaty Grounds
France	Auckland	Orakei Marae
Tournament support staff	Auckland	Orakei Marae
IRB staff	Auckland	Orakei Marae
Tonga	Auckland	Papakura/Whātāpaka Marae
New Zealand	Waikato	Turangawaewae Marae
Namibia	Gisborne	Te Poho o Rawiri Marae
Fiji	Tauranga	Huria Marae
Samoa	Rotorua	Te Papaïouru Marae
South Africa	Taupo	Waihi Marae
USA	Whanganui	Pūtiki Marae
Georgia	Masterton	Te Ore Ore Marae
Wales	Porirua	Takapūwāhia Marae
South Africa	Wellington	Te Raukura (Te Wharewaka)
Italy	Nelson	Wakatū Marae
Russia	Blenheim	Omaka Marae
Scotland	Invercargill	Te Rau Aroha Marae

Table 14: Joint pōwhiri and civic ceremonies

TEAM	REGION
Australia	Auckland iwi and region
England	Ngai Tahu and region
Japan	Auckland iwi and region
Romania	Ngai Tahu and region
Argentina	Ngai Tahu and region
Ireland	Ngai Tahu and region

Source: wakamaori.co.nz/maori-culture/marae/ and www.rugbyworldcup.com/home/news/newsid=2044206.html



NEW ZEALAND 2011

The silver fern is an unofficial national emblem of New Zealand. The first sports team to wear the silver fern was the 1888 New Zealand Natives Rugby team on its tour of Britain. The silver fern is a species of tree fern (cyathea dealbata) native to New Zealand.

