

GLOBAL REACH OF RUGBY 2019

A NIELSEN STUDY
FOR WORLD RUGBY



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Foreword – World Rugby Chairman



On behalf of World Rugby, I am pleased to present the results of our annual survey on the global reach of the game. The research conducted by Nielsen in November 2019 paints a very positive and progressive picture of how our sport developed and grew in 2019, thanks largely to the game-changing Rugby World Cup in Japan.

Of course it is important to acknowledge that the results presented in this document were compiled before the COVID-19 pandemic began, and it will provide important insights as we continue the collective drive to return to international rugby as soon as it is safe to do so.

The research reinforces our belief that 2019 was a momentous year for rugby, with rising interest from both nations where rugby has been established for decades and countries that have more recently fallen in love with the oval ball game. Driven by the growth of the women's game and sevens, especially within rugby's emerging nations, the year culminated in a ground-breaking Rugby World Cup in Japan that inspired an entire continent and whose positive outcomes will resonate for years to come.

Rugby World Cup 2019, the first held in Asia, was the most watched rugby event ever with more than 857 million people around the world viewing our showcase tournament, a 26 per cent increase from the 2015 edition. The tournament truly captured the host country's imagination and boosted national pride, excitement and engagement in the country but also attracted new audiences around the globe outside rugby's traditional borders.

In rugby's emerging nations, rising interest translated into a significant fanbase which almost doubled since 2013 to reach 168 million. Among these emerging nations, Brazil and India have experienced the most notable increases in fans of men's rugby, 56 and 64 per cent respectively, between 2018 and 2019.

It has also been a tremendous year for women in rugby with female players now accounting for 25 per cent of the global playing population. I am delighted to see interest in the women's game grow both in established and emerging nations and, maybe more importantly, having more women interested in rugby as illustrated in the survey with a 29 per cent increase in the number of female rugby fans.

The combined success of RWC 2019 and significant growth of women in rugby are promising signs ahead of the much-anticipated Rugby World Cup 2021 in New Zealand. I sincerely believe the tournament will be a beacon of hope for the rugby world after a disrupted 2020 and will inspire more women to embrace rugby and its core values.

While these results are very encouraging, my sole focus remains on the future and taking the sport forwards. Significant developments have been made regarding player safety, as reflected in perceptions improvements in a vast majority of countries, and player welfare will remain our top priority.

While the global pandemic has disrupted our environment, we know we can rely on the character-building values demonstrated by so many during the crisis to continue to grow the game globally with progressive and sustainable change.

To conclude, I would like to recognise the enormous contribution from member unions, regional associations, players, partners, fans, and the wider rugby family in continuing to make our game so special and so well loved around the world.

Sir Bill Beaumont

Chairman, World Rugby

Methodology

Nielsen's Annual "Global Reach of Rugby" providing global fan trends and insights was conducted in November 2019. It collected data from 17 nations to obtain an understanding of the current state of global rugby and the progress that World Rugby, unions and the wider rugby family have made in growing the game over the past year.

To compile the data, Nielsen undertook in-depth 30-minute online interviews with participants across 11 established rugby nations and six emerging rugby nations, with 500 nationally representative respondents per country. In addition to the nationally representative samples, a secondary group of 500 rugby followers per country was interviewed.

The nations participating in Nielsen's research were:

- Rugby established nations: Argentina, Australia, England, France, Ireland, Italy, Japan, New Zealand, Scotland, South Africa, Wales
- Rugby emerging nations: Brazil, China, Germany, India, Russia, USA

The questionnaires covered the following topics:

- Type of rugby interest, entry route and length of interest
- Competition awareness and interest
- Rugby World Cup
- Men's, women's and sevens rugby: attitudes and behaviours
- World Rugby brand ratings
- Player welfare and safety perceptions

The research can be compared with data gathered in December 2018 and November 2017.

The "Global Reach of Rugby" is combined with findings from Nielsen SportsDNA, a separate, universal study used by Nielsen globally for every sport, surveying 1,000 nationally representative online respondents between the ages of 16-69 in 36 countries on their interest in rugby union to identify how many people are 'very interested', 'interested', 'a little interested' or 'not interested at all' in rugby. In both India and China, the survey sample is 2,000 respondents, representative of the urban online population across the 11 biggest cities in each country.

The population figures used for extrapolations are based on the total population for each country aged 16-69 as this is the population represented by the survey sample.

Nielsen then establish the relationship between those levels of interest in rugby and 10 publicly available statistics for every country (Number of rugby clubs, registered rugby players, male rugby players, female rugby players, total population, urban population, GDP, Facebook users, internet penetration and mobile cellular subscriptions).

The result of this regression analysis is a predictive model which allows them to forecast rugby interest in a further 49 countries where primary research is not available, by building a statistical correspondence between the surveyed 36 countries and the 49

unsurveyed countries, predicting the absolute number of rugby union fans across the total 85 countries globally.

This model has an R^2 value of 0.96 for 'Top 2 Box Interest', meaning it can predict 96 per cent the 36 surveyed data points to within one standard deviation (+/-5%) from the actual 'Top 2 Box' score (i.e. the number of people interested or very interested in rugby).

World Rugby can compare annual results for all 85+ countries from studies undertaken by Nielsen in November 2019, May 2018 and May 2017, and annual data for 13 countries going back to May 2013.

Executive summary

Across the globe, interest¹ in rugby is growing rapidly. There were 877 million rugby followers in 2019, up 11 per cent since 2018. There were also 405 million fans² and 126 million avid fans³, marking an 18 per cent and 17 per cent increase since 2018, respectively.

In 2019, this growth was epitomised by the trail-blazing and game-changing Rugby World Cup held in Japan which led to increased awareness and engagement with the sport. The tournament, which was the first in Asia, generated unprecedented interest growth across the globe. 2019 also saw substantial growth in rugby interest in emerging nations and the accelerated rise of women in rugby. Additionally, important developments were made regarding player welfare and safety, as demonstrated by a significant reduction in the concussion rate at Rugby World Cup 2019.

Spurred on by Rugby World Cup 2019, interest in men's rugby is up to 63 per cent in established nations and 30 per cent in emerging nations, a 11 per cent and 15 per cent increase compared to 2018, respectively. In established nations, one of the most notable statistics came from South Africa, where a massive 84 per cent stated an interest in men's rugby. In Brazil, 41 per cent of people declared an interest in men's rugby, providing the highest level for all emerging nations. The outlook for women's rugby is equally encouraging as highlighted by the rise in interest in established nations to 45 per cent and in emerging nations to 27 per cent.

Asia's first Rugby World Cup created a surge in interest for rugby across the continent. The number of rugby fans grew to 38 per cent in Japan, and 14 per cent in India, marking a 138 per cent and a 75 per cent increase compared to 2018, respectively. Engagement with the tournament was not limited to Asia, though, as fans passionately followed the tournament all around the world. In established nations, France was particularly engaged with rugby in 2019, and excitement builds in the country ahead of hosting Rugby World Cup 2023.

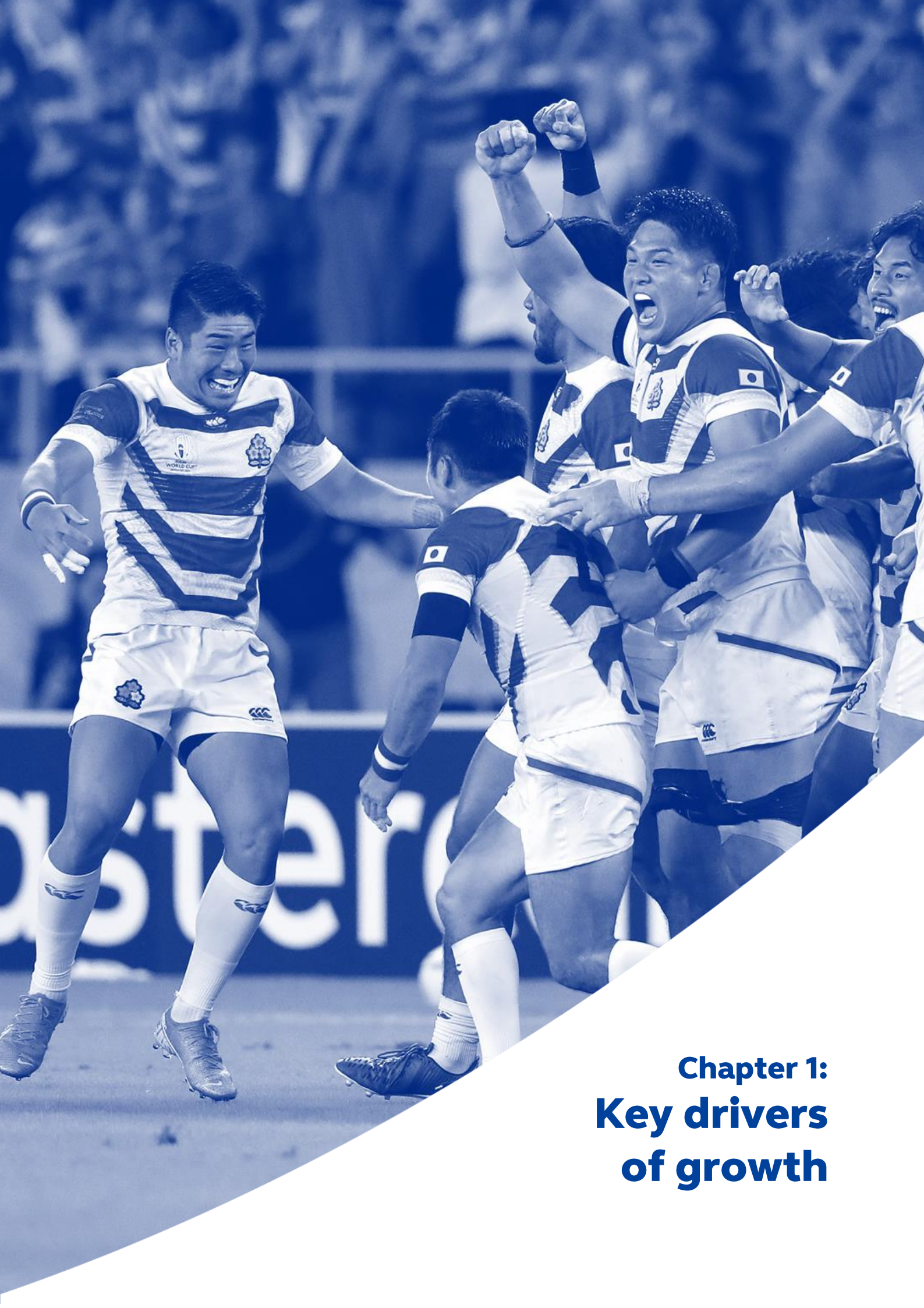
There were also significant improvements in perceptions of rugby. Positive values such as teamwork, discipline and fair play which are frequently associated with rugby, became increasingly recognised in rugby's established nations. Another important perception of rugby – that it is a safe sport for children – also significantly increased.

World Rugby's primary objective is to advance player welfare and safety, and further significant strides were made in this area in 2019. The successful introduction of the High Tackle Sanction Framework reflects World Rugby's ongoing commitment to making sure the sport is even more enjoyable and safer for all.

¹ Rugby followers relate to respondents self-classifying as being either 'a little interested, interested or very interested' in rugby union

² Rugby fans related to respondents self-classifying as being either 'interested or very interested' in rugby union

³ Rugby avid fans relate to respondents self-classifying as being 'very interested' in rugby union



Chapter 1: Key drivers of growth

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- Rugby interest is growing in emerging nations. The number of rugby fans across the surveyed emerging nations has almost doubled since 2013, with Brazil and India showing the most impressive levels of growth.
- Rugby is associated with a host of positive values and two thirds of followers in established nations agree that men's rugby sets a positive example.
- Rugby World Cup 2019, hosted by Japan, was the most watched rugby event ever as more than 857 million people around the world watched the action.

2019 was a momentous year for rugby, with rising interest across the globe, sparked by a ground-breaking Rugby World Cup, and strong growth in emerging nations and women's rugby. World Rugby held its flagship men's 15s tournament in Asia for the first time and it became the most watched in history. Held across Japan and won by South Africa, Rugby World Cup 2019 encouraged growing interest in the sport in both established and emerging nations, helping to attract a significant number of new fans to the game. Throughout 2019, World Rugby continued its drive to promote women in rugby, creating the 'Try and Stop Us' campaign and launching a bespoke women.rugby website.

Emerging nations driving rugby's global rise in interest

The number of rugby fans across the surveyed key emerging nations has almost doubled since 2013, up to 168 million. Brazil and India are the emerging nations with the most notable increases in rugby fans, with 25 per cent of Brazilians classifying themselves as fans of men's rugby while 23 per cent of those in India do also. These figures represent year-on-year increases of 56 per cent and 64 per cent respectively.

Growth in emerging nations has continued with rugby attracting a fresh, new audience. In emerging nations, the average length of time a fan has been following the men's game is just five years, with two thirds of all new followers being introduced by rugby sevens or touch rugby.

Following the successful Olympic debut of rugby sevens at Rio 2016, the sport will again be on display at the Tokyo Games in 2021, providing a further springboard for growth. Following the Rio 2016 Olympic Games, sevens interest in Brazil has risen by almost 10 per cent to 42 per cent. The rise of sevens in Brazil is also reflected by increasing interest in the 15s game. In Brazil, 43 per cent are followers of rugby, a 15 per cent increase year-on-year, and in India, 30 per cent are followers, a 25 per cent year-on-year increase. Brazilian men's rugby fans have only been following the sport for, on average, 3.4 years, which highlights the success of the 2016 Olympic Games in attracting new fans to the sport.

Rugby is increasingly becoming a key part of society in emerging nations. This is most noticeably demonstrated in India, where 49 per cent of followers agree that men's rugby is an important part of their life. In both Brazil and India, traditionally nations focused on football and cricket respectively, half of rugby followers say they keep up-to-date with men's rugby news.

Rugby's positive values key to the sport's attraction

Rugby is associated with a host of positive, character-building values with many followers recognising discipline, fair play, passion and teamwork as the sport's core values. More than two thirds of rugby followers in established nations agree that men's rugby sets a positive example. In established nations, this figure is highest in France, with 77 per cent agreeing that men's rugby sets a positive example, while in emerging nations an impressive 72 per cent of Brazilian rugby followers also agreed. In 2019, the association of 'teamwork' and 'passion' with rugby increased significantly in established nations and in emerging nations people became more likely to believe that rugby is 'exciting' compared to 2018.

World Rugby worked hard to encourage fair play in rugby throughout 2019 with the ongoing Keep Rugby Clean initiative, an anti-doping education and awareness programme. All 20 participating teams at Rugby World Cup 2019 in Japan supported the initiative as World Rugby continued its drive to ensure rugby remains a fair sport.

Rugby World Cup 2019 attracting new fans

Rugby World Cup 2019, hosted by Japan, was the most watched rugby event ever as more than 857 million people around the world watched the action, representing a 26 per cent increase from the 2015 edition. RWC 2019 saw an increase in awareness of the tournament in all nations; specifically, a jump to 31 per cent in emerging nations and a rise to 71 per cent in established nations.

The tournament, which saw South Africa crowned champions, increased interest in the event in established nations to 49 per cent. In emerging nations, more than one third of those who were aware of the tournament said that they watched six or more live games. This was particularly striking in the US and in Brazil, where more than half of those who were aware of the tournament said that they watched six or more live games, despite the time difference.

Held in Asia for the first time, Rugby World Cup 2019 encouraged growing interest in rugby across the continent. There was impressive growth in south-east Asia, where Thailand, the Philippines, Malaysia and Vietnam featured in the top 20 for TV figures globally. Asia is becoming a key region for rugby growth, and in India, the Philippines, South Korea and Vietnam, avid fans of the game have at least doubled since 2017.

The tournament successfully attracted and engaged a host of new fans, particularly in emerging nations. In Brazil, 68 per cent of Rugby World Cup followers were doing so for the first time, as were 47 per cent in the US and 61 per cent in China. The tournament supported World Rugby's drive to grow rugby beyond its traditional borders, and in emerging nations 83 per cent of people aware of Rugby World Cup 2019 think rugby will become more popular as a consequence.

Rugby World Cup 2019 was more than just a sporting event and encouraged positive feeling in Japan and beyond. Nine out of 10 people in Japan believed that hosting Rugby World Cup 2019 captured the population's imagination, boosting national pride, excitement and engagement in the country. The tournament is also expected to leave an important legacy by encouraging more people to watch and play the game with 2.25 million people taking part in the Impact Beyond legacy programme across Asia.

In established nations, more than half of those aware of the tournament agree it was likely to encourage children to play more rugby, while 48 per cent agree that they will watch more rugby as a result. The figures in emerging nations showed 76 per cent of those aware of Rugby World Cup 2019 agree that the tournament has encouraged them to watch more rugby, while 73 per cent believe the tournament will encourage children to play more, and in greater numbers.



Chapter 2: Rise of Women in Rugby

Chapter 2: Rise of Women in Rugby

- Women now account for a quarter of the global playing population.
- In May 2019, it was announced there had been a sharp rise of 28 per cent in participation since 2017 with 2.7 million involved in the game globally.
- The number of female rugby fans is growing, demonstrated by a 29 per cent increase across 36 surveyed nations since 2018.

Women's rugby has been identified by World Rugby as one of its top three priorities with the development of women in rugby recognised as the single greatest opportunity for the sport to grow in the next decade.

Female participation on the rise

Driven by a rise of young females playing rugby, women now account for a quarter of the global playing population. There has been a sharp 28 per cent rise in participation since 2017 with 2.7 million females involved in the game globally, and for the second year running, more young girls have got into rugby globally than boys.

It is not just female participation that is on the rise, female rugby fanhood is growing too. Across 36 surveyed nations, there were more than 141million female rugby fans in 2019, which marks a 29 per cent increase since 2018.

As the global governing body, World Rugby has paved the way forward with its commitment to the normalisation of women at every level in rugby. In November 2017, World Rugby launched its ambitious Accelerating the global development of women in rugby 2017-25 strategic plan with the goal of giving women involved in rugby equity on and off the field.

Try and Stop Us

A core component of World Rugby's strategy is to continue to raise the profile and increase interest in women's rugby among fans worldwide. 2019 represented another landmark year, with the decision to adopt a gender-neutral approach to the naming of its major tournaments, a first for a major sporting federation.

World Rugby also launched a new and unique brand identity 'Women in Rugby', a new website www.women.rugby, and a global marketing campaign, 'Try and Stop Us', which aimed to engage directly with women's audiences across established and emerging nations.

Through a group of global, trailblazing 'Unstoppable' women in rugby from 15 different countries, World Rugby communicated a core message that rugby builds confidence with its impactful campaign message – start rugby, become unstoppable.

Women's rugby attracting new fans

The 2019 findings demonstrated continued growth with women's rugby experiencing a substantial increase in interest in established and emerging nations. In established nations, 43 per cent of Japanese people and 60 per cent of South Africans are interested

in women's rugby. In emerging nations, 41 per cent of Brazilians are interested also. These figures represent year-on-year increases of 67 per cent, 22 per cent and 32 per cent, respectively.

Since 2018, positive perceptions of women's rugby have increased with teamwork and passion cited as the values at its core. Across both established and emerging nations, three quarters of those questioned agree that women's rugby is both character building and confidence instilling.

With greater investment and focus given to women in rugby over the past year, there have been dramatic improvements in the standard of the game and knowledge of women's rugby. More than 70 per cent of women's rugby followers agree that the standard of the sport is increasing every year, while more than two thirds of followers agree that knowledge of women's rugby is increasing each year.



JAPAN 2019

#RWC2019

RWC 2019 FINAL

E14

E13

SOCIÉTÉ GÉNÉRALE

mastercard

DHL

LAND ROVER

Emirates FLY BETTER

Heineken

RUGBY
WORLD CUP™
JAPAN 2019

Chapter 3: Rugby World Cup 2019

Chapter 3: Rugby World Cup 2019 – a game-changer for Japan

- The Japanese public was captivated by the tournament with 68 per cent of those aware that the tournament took place in Japan agreeing that it was the best sporting event they had watched in 2019.
- Japanese people followed the tournament in huge numbers, as demonstrated by the broadcast figures, with a total cumulative audience of 425 million tuning in across Japan.
- Rugby World Cup 2019 has created an important and enduring legacy, with 85 per cent of those aware that the tournament was held in Japan agreeing that rugby will become more popular as a result.
- Rugby interest is soaring throughout Japan, with the number of avid fans quadrupling, and the number of fans increasing by 138 per cent in 2019.

2019 was a game-changer for rugby in Japan, and throughout Asia, with interest in all forms of the sport soaring to new heights. The successful Rugby World Cup held in Japan was the catalyst, driving a huge growth in interest, awareness and participation, building up to and following the tournament.

Aside from record economic and on-field success, Japan 2019 also generated significant social benefits with increases in excitement, wellness and national pride, demonstrating the enormous value of hosting to the national mood.

It also attracted ‘Niwaka’ or new fans to the sport by presenting rugby in an exciting, more accessible way.

Japan’s iconic red and white shirts were on display throughout the country with more than 200,000 Brave Blossoms jerseys sold during the tournament. Match tickets also were in high-demand, and a record 99.3 per cent of capacity – or 1.84 million – sold.

Rugby becoming an important part of life in Japan

In Japan, there were more than 49 million rugby followers in 2019, representing 60 per cent of the population⁴. There has been a growth of 138 per cent in the number of rugby fans in the country since 2018. Rugby World Cup has helped to convert rugby followers into avid fans, with the latter now accounting for 16 per cent of the population, quadrupling from four per cent in 2018.

Propelled by Rugby World Cup 2019, interest in men’s rugby grew from 37 per cent to 59 per cent, while interest in the women’s game rose to 47 per cent from 28 per cent during 2019. Ahead of the Tokyo Olympic Games, interest in rugby sevens has also increased considerably, from 36 per cent to 53 per cent.

⁴ Japanese population aged 16-65 represents 82.6 million people

Supporters of rugby in Japan became more committed to the sport, demonstrated by a decline in the percentage of Japanese rugby followers who had never watched a men's rugby match, from 25 per cent to 19 per cent, and an increase in the number who kept up-to-date with men's rugby news, from 27 per cent to 35 per cent. Rugby is gradually becoming more influential throughout the country, with 14 per cent of rugby followers agreeing that men's rugby is an important part of their life.

Rugby's positive values resonate in Japan

Rugby is widely seen as a sport associated with positive values and behaviours. These values are becoming increasingly recognised by Japanese society. Perceptions of rugby in the country have improved, with 61 per cent of Japanese rugby followers in 2019 believing that men's rugby sets a positive example, compared to 39 per cent the previous year.

Rugby World Cup 2019 catalyst for continental growth in rugby interest

The recent growth of rugby in Asia can be largely accredited to the successful Rugby World Cup held in Japan from September to November 2019.

In 2009, the World Rugby Council selected Japan as hosts and with it came Asia's first Rugby World Cup. A huge number who had not followed rugby previously across the world's most populous and youthful continent fully immersed themselves in rugby. In Japan, almost half of men's rugby fans have been interested in the sport for less than a year and, despite Japan featuring in every Rugby World Cup since the inaugural tournament in 1987, more than half of those who followed the tournament were following it for the first time.

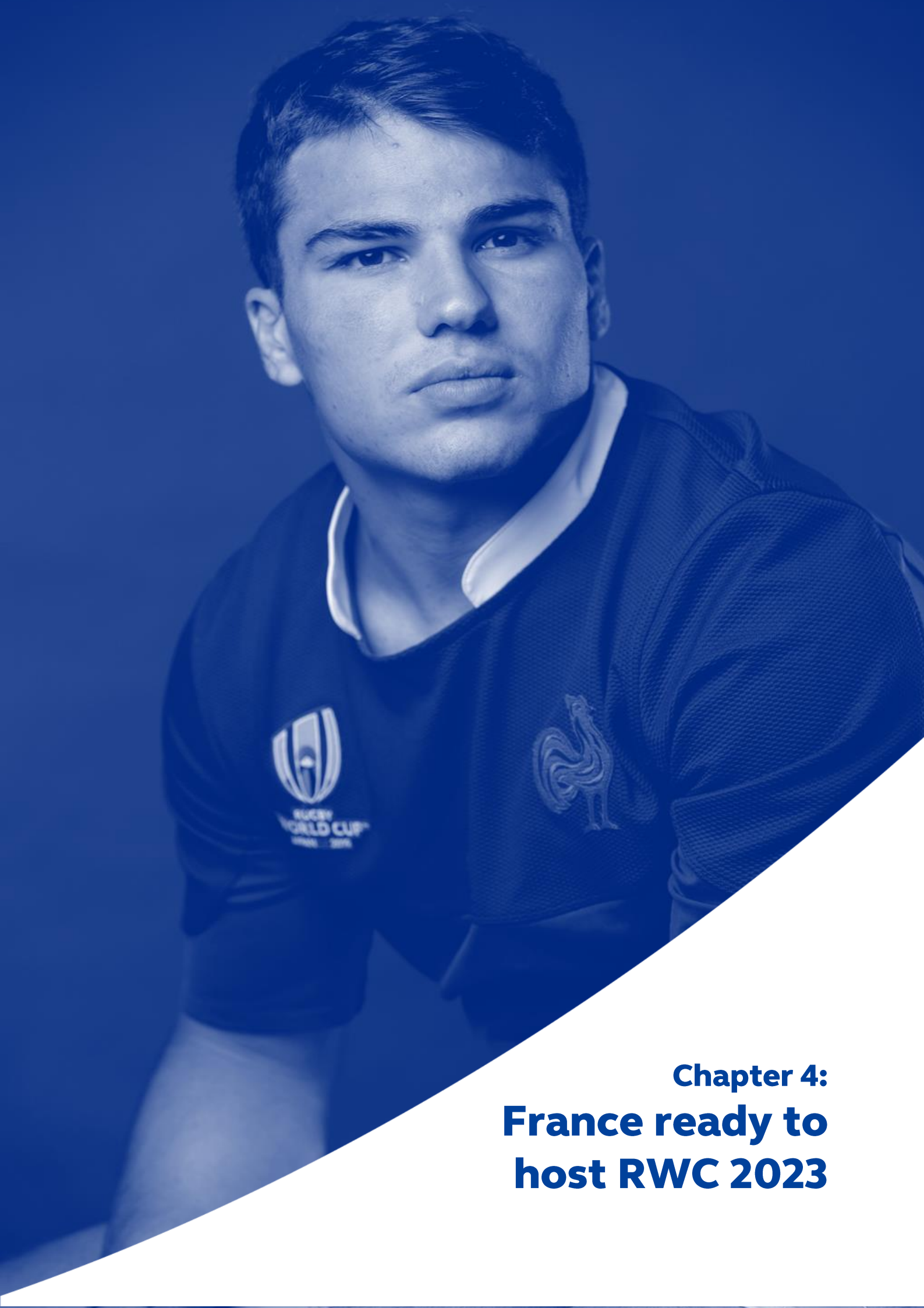
The hosts had a successful tournament, with the Brave Blossoms topping their pool and becoming the first Asian nation to make it through to the knockout phases of a Rugby World Cup. While they were knocked out by eventual winners South Africa in the quarter-finals, their strong performances inspired widespread Japanese interest. Almost a third of Japanese people who were aware of Rugby World Cup said that they watched a minimum of six live games, and fewer than one in 10 did not watch a game or follow it in the news.

The vast Japanese interest in the tournament was also reflected in the broadcast figures, with a total cumulative audience of 425 million people in Japan tuning in. Japan's quarter-final clinching victory, which was played just hours after Typhoon Hagibis had swept through the country, was watched by a domestic record rugby TV audience of 54.8 million, greater than the FIFA 2002 World Cup final, which was also held in Japan.

Driven by Rugby World Cup, 2019 also saw a large increase in the percentage of Japanese rugby followers supporting the Brave Blossoms, rather than club rugby, rising from 15 per cent to 42 per cent. The Japanese team featured in several exciting games during their Rugby World Cup campaign and the Japanese public were captivated by the tournament, with 68 per cent of those aware of the tournament agreeing that it was the best sporting event they had watched in 2019. The overall interest in Rugby World Cup increased in Japan from 26 per cent to 43 per cent, and 87 per cent of Japanese people who were aware of the tournament agreed that it captured the nation's imagination.

Record Rugby World Cup legacy

World Rugby believed hosting Rugby World Cup in Japan would provide an opportunity to reach and engage a new demographic of fans, grow the game and leave a long-term legacy. Eighty-eight per cent of Japanese people aware of the tournament agreed that it would improve the standard of rugby in the country, while 74 per cent agreed that it would encourage children to play more. Eighty-eight per cent of Japanese people aware of the tournament agreed that hosting Rugby World Cup in Asia for the first time ever was good for the sport, while 85 per cent agreed that rugby will become more popular as a result.



Chapter 4:
France ready to
host RWC 2023

Chapter 4: France ready to host Rugby World Cup 2023

- In 2019, there were almost 20 million French rugby fans, 44 per cent of the population⁵.
- Rugby is in France's DNA with 60 per cent of men's fans keeping up-to-date with the sport's latest news on a regular basis – the highest percentage in the world.
- A high proportion of those aware of Rugby World Cup 2019 were engrossed in it with 47 per cent saying that they watched six or more live games.
- The positive values associated with rugby are recognised in France as French rugby followers believe the sport is a force for good with 77 per cent agreeing that men's rugby sets a positive example.

France is a nation with a rich rugby history and a passionate fan base having played their first test match more than a century ago in 1906 against New Zealand. Interest in the sport continues to grow to this day, boosted by their status as hosts of the next Rugby World Cup in 2023. The French population is eagerly looking forward to hosting Rugby World Cup, with both traditional and new fans hoping to see France lift the Webb Ellis Cup for the first time.

A passionate rugby nation with interest building in Rugby World Cup

Rugby is an established part of the public consciousness in France with 68 per cent of people aware of Rugby World Cup and 45 per cent interested in it. A high proportion of those aware of Rugby World Cup 2019 were engrossed in it with 47 per cent saying that they watched six or more live games.

In 2019, there were almost 20 million French rugby fans, which accounts for 44 per cent of the population. Rugby is in France's DNA with 60 per cent of men's rugby fans keeping up to date with the sport's latest news on a regular basis – this is the highest percentage in the world. Sixty-five per cent of France's population are followers of rugby and 19 per cent say they are very interested in the sport. This level of engagement guarantees Les Bleus widespread support wherever they play.

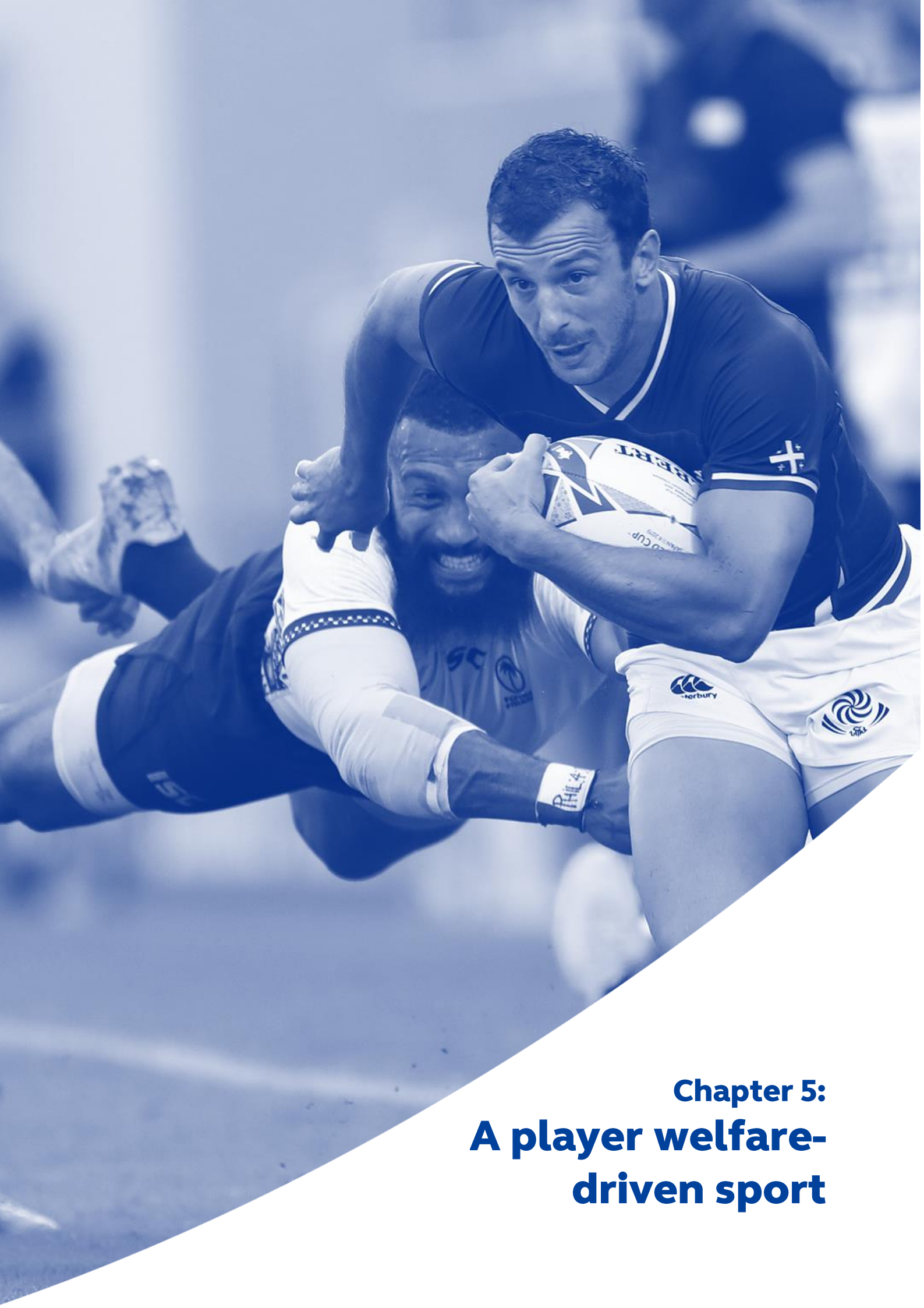
The positive values associated with rugby are recognised in France as followers of French rugby believe the sport is a force for good with 77 per cent agreeing that men's rugby sets a positive example. Again, this is the highest score in all global nations. This focus on the social impact of hosting is a cornerstone of France 2023.

France have reached the men's Rugby World Cup final three times and will be determined to go one better in front of their own fans in 2023. If the French fans' obvious passion inspires the players on the pitch and matches Les Bleus' ambitions off it then Rugby World Cup 2023 is set to be a fantastic tournament.

⁵ French population aged 16-65 in the survey

Emergence of new French rugby fans

Rugby is growing in France, and the number of avid fans in the country has increased to more than eight million. A large proportion of these French men's rugby fans have followed the sport for a long time with 36 per cent of fans having an interest spanning more than 30 years. But there are also a sizeable number of new fans, with 14 per cent following the sport for less than two years. The emergence of a new fan base in France is also demonstrated by the fact that 20 per cent of those who were engaged in Rugby World Cup 2019 were experiencing the tournament for the first time. These statistics indicate that new fans are being introduced to rugby on a consistent basis in France, laying the groundwork for a well-supported Rugby World Cup 2023.



Chapter 5: A player welfare- driven sport

Chapter 5: A player welfare-driven sport

- Player safety perceptions have improved, with 15 out of 17 nations surveyed agreeing that rugby is safer now than five years ago.
- Rugby World Cup 2019 saw significant innovation and improvements in player safety.
- Japan 2019 saw a 28 per cent reduction in overall incidence of concussion and a 37 per cent reduction in tackle concussion incidence when compared to the elite competition average.
- World Rugby's Law Review Group approved closed trials for several proposed law changes, including reducing tackle height to the waist to limit the risk of head injuries, and introducing a 50:22 kick rule which will encourage more space on the pitch and thereby fewer tackles and injuries.

Player welfare is the number one priority of World Rugby and its member unions. Its protocols, laws and educational programmes – centred on evidence-based research and supported by independent experts – are protecting and supporting players at all levels.

By working with scientific institutions and experts over many years, World Rugby has conducted and supported extensive research on injury management, creating a comprehensive understanding of injury trends and causes. World Rugby and its medical and scientific experts and partners are also collaborating on the next step – a research-based approach to injury prevention targeting common causes of injury and factors that increase injury risk, for example, the tackle.

In 2019, this approach led to a dramatic 28 per cent decrease in the concussion rate at Rugby World Cup 2019 and in elite competitions.

Perceptions about player safety

Across the globe, perceptions about player safety in rugby have improved, with 15 out of 17 nations surveyed agreeing that rugby is safer now than five years ago. There are also positive perceptions about the welfare of children playing rugby, with 92 per cent of parents agreeing that they have never stopped their children participating in rugby due to risk of injury.

Marcoussis Player Welfare symposium

In 2019, a three-day Player Welfare symposium was held at Marcoussis in Paris, attended by senior medical figures, administrators, coaches and players' representatives. Following the symposium, World Rugby's Law Review Group (LRG) met to discuss potential rule amendments to further prevent rugby injury. The LRG approved closed trials for several proposed law changes, including reducing tackle height to the waist to limit the risk of head injuries, and introducing a 50:22 kick rule which will encourage more space on the pitch and thereby fewer tackles and injuries.

Also launched globally by World Rugby in 2019 was the Activate warm-up programme with the objective to reduce the risk of soft-tissue injuries and concussion at elite and community levels. The programme is being run in more than 100 countries with soft

tissues injuries reduced by 26 and 40 per cent (youth and adult), while concussion risk is reduced by 29 and 60 per cent (youth and adult).

Rugby World Cup 2019: Innovation in player safety

Rugby World Cup 2019 saw significant innovation and improvements in player safety, as demonstrated by a 28 per cent reduction in overall incidence of concussion and a 37 per cent reduction in tackle concussion incidence when compared to the elite competition average.

The tournament was the first Rugby World Cup to feature the High Tackle Sanction Framework, a tool that provided a step-by-step method for grading a high tackle and ultimately helped lead to a reduction in dangerous collisions. A pre-tournament awareness programme devised by World Rugby led to greater understanding, while stricter refereeing also meant that yellow card sanctions rose by 74 per cent and red cards by 138 per cent versus the 2018 elite competition average. Players were aware that if they broke high-tackle regulations, they would likely receive a card, and this quickly became a strong deterrent.