

ICASA INQUIRY INTO TELEVISION SUBSCRIPTION BROADCAST SERVICES IN SOUTH AFRICA

World Rugby presentation – January 2021



World Rugby – Vision and Purpose

- World Rugby is the International Federation for Rugby Union.
- Our **Vision**: “A Global Sport for all – True to its Values”
- Our **Purpose**: “Growing Rugby by making it more relevant and accessible”
- We grow the sport through our pillars of Competition, Participation and Engagement.
- As a competition owner we generate revenue through commercial sponsorship and media rights.
- We redistribute our revenue to fulfil our Vision and Purpose.
- As a not for profit we fully support our membership and do not have external investment.



GLOBAL REACH

126

Members

20

Associate
Members

6

Regional
Associations



WORLD
RUGBY

Footprint in Africa

- 37 Countries Play Rugby
- 19 World Rugby Members ●
 - Botswana
 - Burkina Faso
 - Cameroon
 - Cote d'Ivoire
 - Eswatini
 - Ghana
 - Kenya
 - Madagascar
 - Mauritius
 - Morocco
 - Namibia
 - Nigeria
 - Rwanda
 - Senegal
 - **SOUTH AFRICA**
 - Tunisia
 - Uganda
 - Zambia
 - Zimbabwe
- 5 Associate Members of World Rugby
- Plus a further 13 Rugby Africa Members



Participation



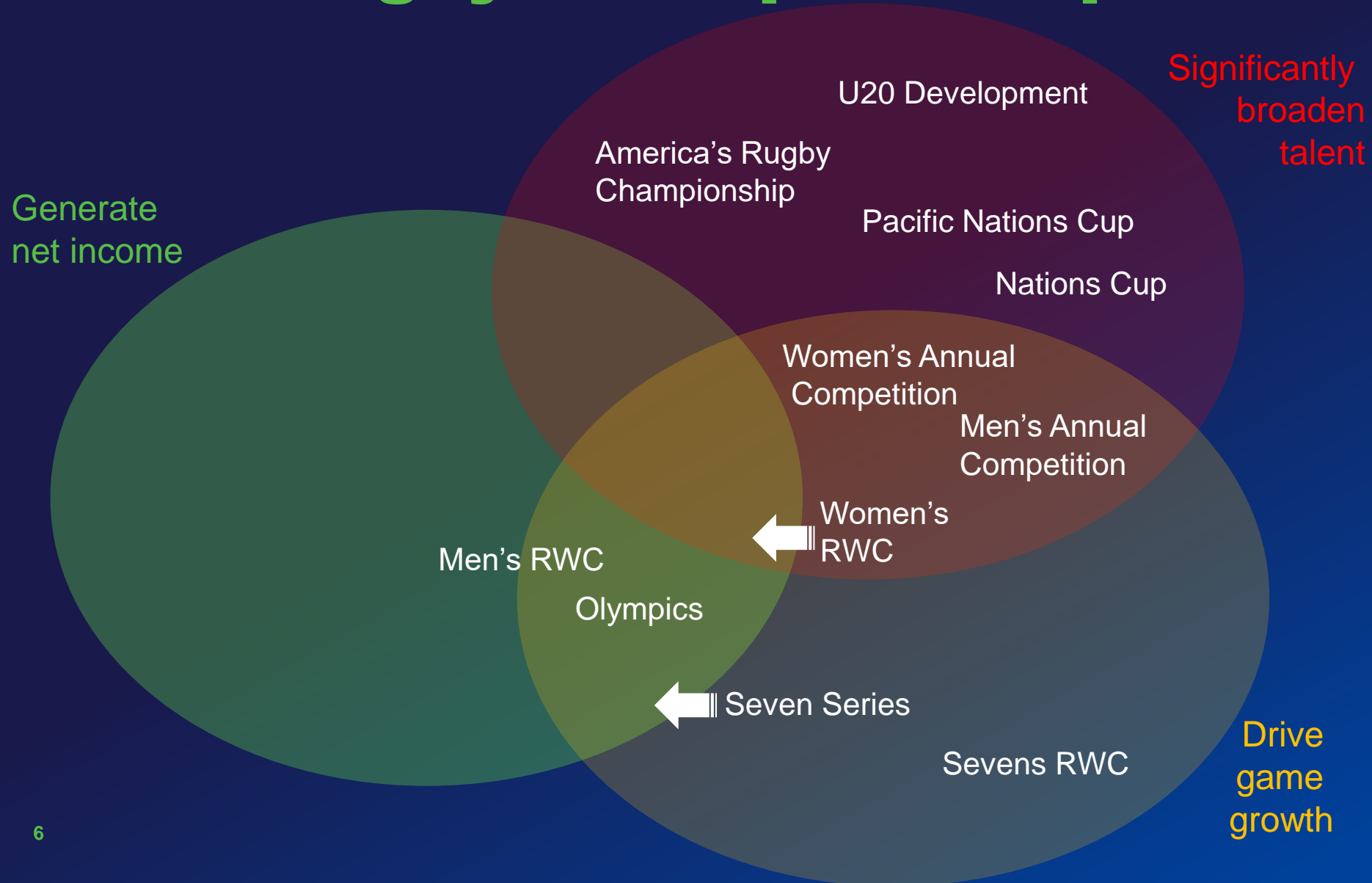
UNSTOPPABLE AFRICA



#TryAndStopUs
rugbyafrique.com



World Rugby – competition portfolio



Revenue Generation and Distribution

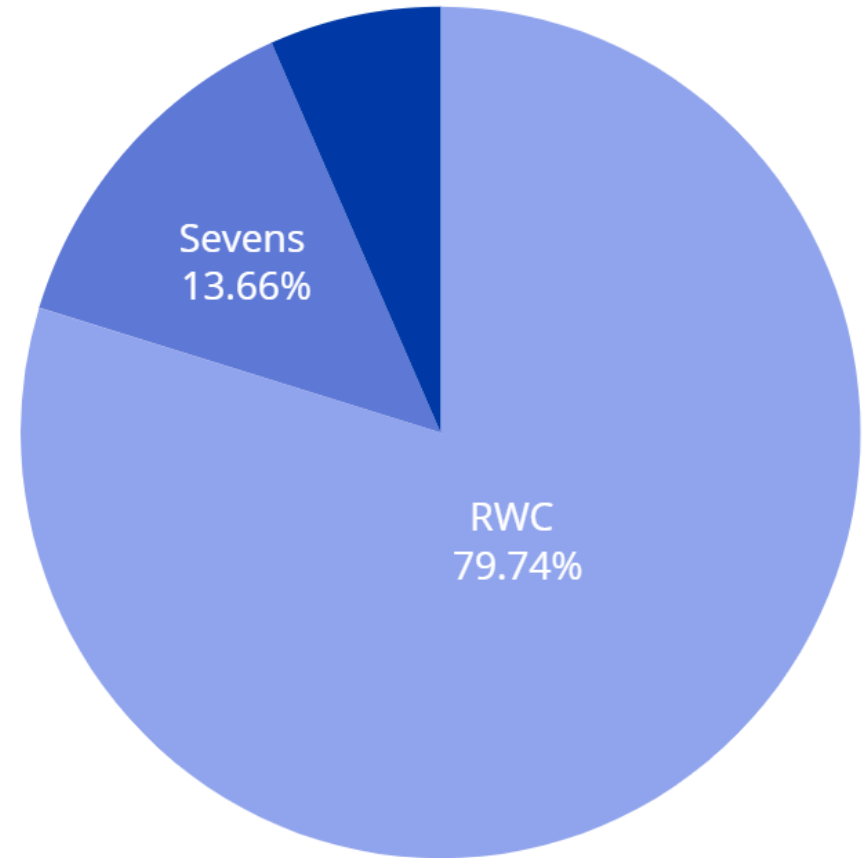
- World Rugby budgets on a four year funding cycle which links to our four year Rugby World Cup cycle.
- In the four year period 2016-2019 we generated sales of £463m with costs of £475m.
- The licensing of Rugby World Cup Rights for the 2019 tournament grossed revenues of £134.7m.
- 857m: RWC 2019 Global Broadcast Audience
- 44.9m: Watches South Africa's triumph over England in the Final.
- A combined 16.7 million in South Africa and England watched the Final.



Revenue Generation

£463M Sum of Amount GBP

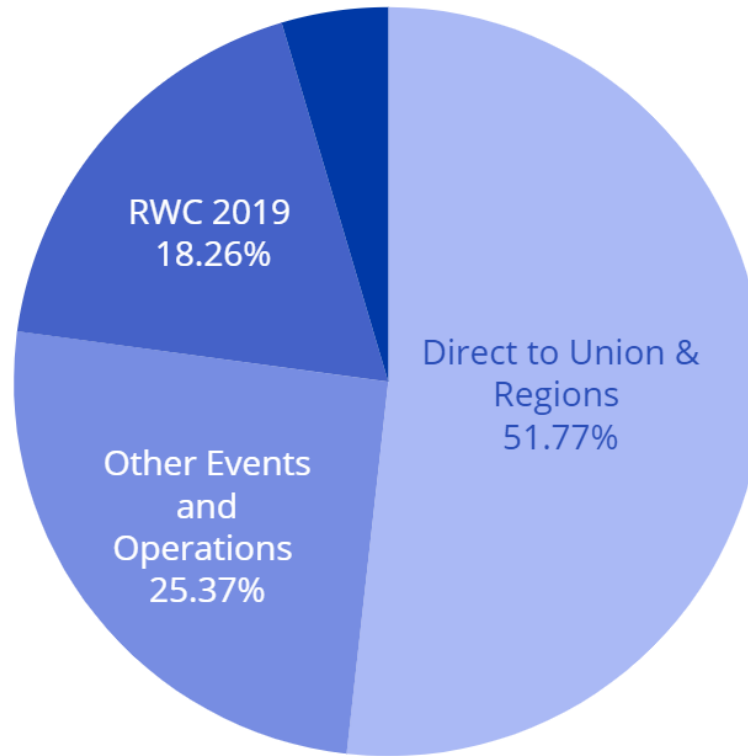
● RWC	£369.21M
● Sevens	£63.25M
● Other Event and Investment Income	£30.53M



Revenue Distribution

£475M Sum of Amount GBP

● Direct to Union & Regions	£245.92M
● Other Events and Operations	£120.53M
● RWC 2019	£86.72M
● Sevens Direct Costs	£21.84M



World Rugby - Developing the Game

- Increasing participation.
- Increasing capability and capacity for Unions and Regions to deliver and develop the game.
- Supporting domestic and regional competition provision.
- **Get into Rugby (GIR):** Introduces young people to rugby and training for adults. 8m people in the last 4 years.
- **Training and Education:** Global network of training courses: coaching, match officiating, first aid/player welfare, strength and conditioning, business leadership.
- **Impact Beyond:** Legacy programme supporting charitable organisations. Our recent work with Childfund across Asia delivered 1m player target linked to 2019 RWC.
- **Unstoppables:**



ICASA Proposed Licence Conditions

- Reduction in World Rugby revenue streams.
- Direct impact on World Rugby's ability to reinvest in growing the global game of rugby.
- World Rugby can balance revenue maximisation, audience reach and securing promotional and coverage commitments from broadcast partners in any relevant market.
- Affect on media rights approach in other African territories over which ICASA has no jurisdiction.
- Impact on multiple World Rugby competitions (i.e. Sevens as well as Rugby World Cup).



ICASA Proposed Licence Conditions

- **3 year term limits:** Affects World Rugby's ability to contract on a four year cycle.
- **Automatic renewal of rights:** World Rugby does not ordinarily grant renewal rights but should have freedom to choose.
- **Rights split / unbundling / wholesale must offer**
- Freedom to package global 48 match (6 week) tournament, to ensure the appropriate mix of revenue maximisation, audience reach, promotional and coverage commitments
- Adherence to Listed Events Legislation
- Proposed conditions will affect sports in different ways – different structures, format and volumes of content.



ICASA Proposed Licence Conditions

Rights split / unbundling / wholesale must offer (cont)

- Exclusivity is key to World Rugby's ability to effectively license its broadcast rights on a territorial basis.
- Consumers forced to purchase more broadcast packages.
- Greater competition in the market.
- World Rugby freedom to choose including launching its own platform.

