



# A GLOBAL SPORT FOR ALL – TRUE TO ITS VALUES

WORLD RUGBY STRATEGIC PLAN  
2021-25



# EXECUTIVE SUMMARY

## BACKGROUND

World Rugby is an organisation and a movement – everyone has a say, and everyone should feel connected with the sport, its advancement and success.

As an organisation, World Rugby leads and guides a sport that has enjoyed significant growth over recent years – across participation, audiences, markets and revenues.

Against a challenging societal and sporting backdrop exacerbated by the COVID-19 pandemic, this Strategic Plan articulates how World Rugby proposes to lead the sport, inspire participation and engagement, support players and grow revenues for the benefit of everyone in the global rugby family in the coming decade.

## OUR VISION

A global sport for all - true to its values

## OUR VALUES

Integrity, solidarity, respect, discipline, passion

## OUR PURPOSE

Growing rugby by making it more relevant and accessible

**THE NEXT STRATEGIC PLAN**

World Rugby plans to fulfil its Purpose and Vision by focusing relentlessly on the three pillars of Competition, Participation and Engagement – underpinned by evolving the game itself, our Product.

This new Strategic Plan will drive the organisation forwards from 2021 onwards. It is a plan for World Rugby as an organisation, based around a Vision and Purpose endorsed by our stakeholders. It will be implemented through a series of annual priorities set by the organisation's Executive Committee. And while it is envisaged that the framework set out here – Competition, Participation, Engagement, Product, Ways of Working – could remain in place for the next decade, given the pace of change in the sector the content of these pillars should be reviewed within the next five years.

**DELIVERING THE NEXT STRATEGIC PLAN**

Without increased revenues, World Rugby will not be able to invest at the levels required to grow rugby globally. Operating competitions profitably, building commercial partnerships, strengthening the brand of the sport and driving value from audiences, will all be critical to our success. We believe that delivering this strategic plan, in partnership with unions, regional associations, partner organisations and commercial partners, will take the sport of rugby from strength to strength in the years to come.

## Strategic Plan Overview

<b>Vision</b>	A global sport for all - true to its values		
<b>Purpose</b>	Growing rugby by making it more relevant and accessible		
<b>Values</b>	INTEGRITY • RESPECT • SOLIDARITY • PASSION • DISCIPLINE		
<b>Pillars</b>	<b>Competition</b> <ul style="list-style-type: none"> <li>Optimise the portfolio</li> <li>Raise standards and competitiveness</li> <li>Build the global calendar</li> </ul>	<b>Participation</b> <ul style="list-style-type: none"> <li>Drive retention</li> <li>Grow women's rugby</li> <li>Target growth markets</li> </ul>	<b>Engagement</b> <ul style="list-style-type: none"> <li>Promote brand rugby</li> <li>Enhance stakeholder relations</li> <li>Drive audience engagement and value</li> </ul>
	<b>The Game (our product)</b> <ul style="list-style-type: none"> <li>Player Welfare &amp; experience</li> </ul>	<ul style="list-style-type: none"> <li>Forms of the game</li> </ul>	<ul style="list-style-type: none"> <li>Utilise expert and audience input</li> </ul>
<b>Culture</b>	<b>Ways of Working</b> <ul style="list-style-type: none"> <li>Responsible</li> <li>Commercial</li> <li>Efficient and Effective</li> </ul>		

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# BACKGROUND AND CONTEXT



# COVID-19 – TACKLING THE CORONAVIRUS CHALLENGE

It would be remiss of any attempt to develop and present a strategic plan at the end of 2020 to not reflect the global COVID-19 pandemic. No individual, family or organisation has been left untouched by the pandemic. Sport has been hard hit in terms of the ability to stage events and matches from community to the elite level. Rugby, as a team and contact-based sport, and one commercially very dependent on match-day revenues, has been among those most adversely affected.

The sport has responded as one might hope to the situation – by pulling and working together to support those most in need. From World Rugby's perspective that has meant a focus on several key areas:

- Assessing and addressing the most urgent funding needs of member unions severely hit financially by COVID-19
- Streamlining our own costs in order to maximise financial support to member unions

- Generating and sharing intelligence and lessons on the COVID-19 pandemic as it has spread around the world
- Working with colleagues across the sport to develop and issue optional COVID-19 law trials
- Creating – in partnership with stakeholders – return-to-play protocols and guidance
- Driving collaboration on the global calendar – both in the short-term and long-term
- Managing effective communication and correspondence with member unions, regional associations and partner organisations
- Shaping and managing the media narrative to assist with understanding and place rugby near the front of the queue for sport's return

In many ways, it is hard to predict what the health, economic, sporting and rugby

landscapes will look like in six months' time, let alone in the years ahead. We do not fully understand the long-term impact of the pandemic. In general, we tend to overestimate the effect of a systemic shock in the short run and underestimate the effect in the long run.

However, as World Rugby successfully concludes its current Strategic Plan, it has never been more important to map a route ahead for the sport.

# THE SPORTS SECTOR – A PERIOD OF TRANSITION

The sports sector as a whole was facing an uncertain, but optimistic, future as the COVID-19 pandemic hit. The optimism was driven by increasing leisure time and spend, the power of sport to deliver live audiences and shared experiences, and the ability to use new technology, and to reach untapped markets. Against that, uncertainty was being driven by increased competition for attention, market saturation for many leading sports, and a feeling that sports rights were potentially reaching a value ceiling. In many ways COVID-19 has accelerated many of these shifts:

- The rise of Esports has taken a step-change as it has filled the vacuum left as traditional sports have had a hiatus
- Those striking rights deals now are struggling to retain previous levels
- Sponsors – many of whom are in business distress themselves – are exerting even more scrutiny over the return on investment from any partnership arrangements
- The struggles of traditional broadcast partners and models has meant that

alternative routes to audiences – such as large-scale streaming services, or going direct to consumer – have become more appealing

- Many sports bodies – including World Rugby – have found that the appetite for sports stories and information has remained as strong as ever despite the absence of live content, illustrating the value of fan-engagement and compelling content
- Outside investment into certain parts of the sports sector – including rugby union – has increased
- A lack of trust in global leadership in general, sport included, and the need to be relevant, authentic and purpose-driven on key global issues such as diversity, inclusion and climate change

As the international federation for rugby union it is World Rugby's role to help and lead the sport – and its constituent parts – to navigate and thrive in this uncertain future sporting landscape.





## RUGBY – STRONG FOUNDATIONS BUT CHALLENGES AHEAD

There is no question that rugby has had – on most measures – a successful past 10 years.

- The sport now has 128 member and associate unions – up from 117 in 2009
- Some 9.6m people play the sport globally – up from 3.7m in 2009
- In almost all markets, the sport is perceived as more exciting than it was
- In almost all markets, the sport is perceived as safer than it was

- Nielsen research suggests that in traditional rugby markets the number of fans has increased by two-thirds over the past decade and in emerging markets such as the USA, Brazil, China and India, the number of fans has doubled

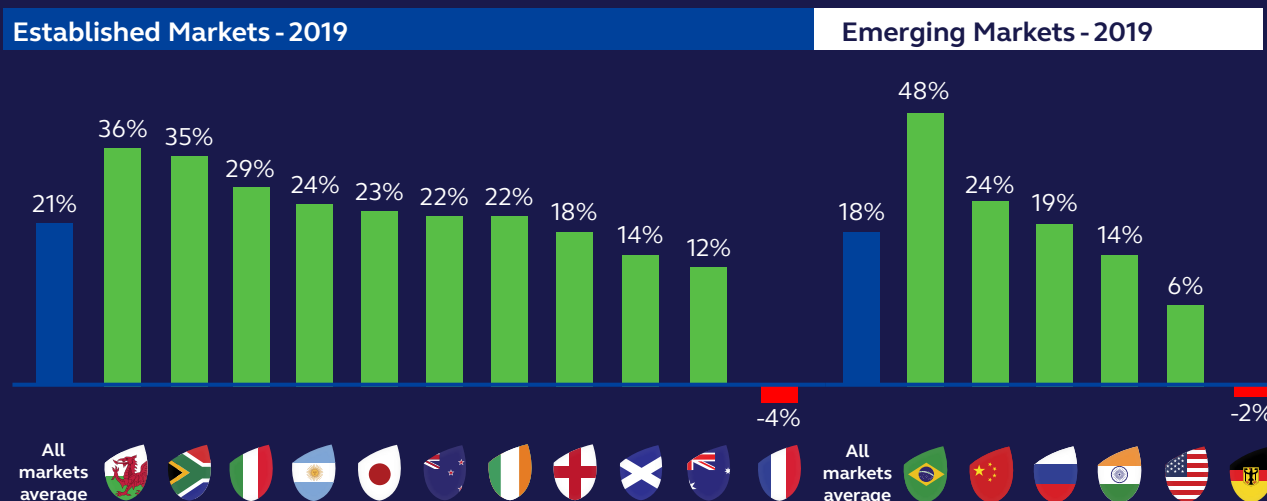
However, against this backdrop, we must tackle several key challenges faced by sports:

- All sports and forms of entertainment are in an increasingly competitive environment, fighting for attention, relevance and share of audience and revenue. Rugby needs to be more flexible

and dynamic to succeed in this environment

- The need to be purpose-driven and align with societal trends
- Time pressures and the availability of suitable options mean that people are flocking to shorter time-frame pursuits
- Technology and cultural change has driven a preference for spontaneous and flexible activities rather than those which require scheduling
- Ever-shortening attention-spans
- The relative complexity of rugby union vs other sports and leisure activities
- The current global club and international calendar, which is not straight-forward for fans to follow
- Economically over two-thirds of global revenues within the sport are generated in the UK and France, with both markets relatively mature and saturated
- The high levels of rights fragmentation in rugby frustrates media partners and erodes total value propositions

Do you feel that rugby is becoming more or less safe/risky that 5 years ago?





## WORLD RUGBY – A SUCCESSFUL FEDERATION AIMING EVER HIGHER

As the international federation for the sport World Rugby has also thrived over the past decade. Successive World Cups have generated increasing interest, audiences and revenues – the men's

Rugby World Cup is one of the planet's biggest sporting events. Olympic status has been won and enjoyed. The values of the organisation continue to be highly-prized by participants and partners. And the body itself is rated highly for governance and trustworthiness. The Association of Summer Olympic International Federations annual audit puts World Rugby in the top bracket of their assessment of 33 such federations.

Finally, at an operational level the organisation has a strong network of partnerships with both member unions, and the regional associations that have now become established.

However, as well as these strengths the organisation also faces a number of challenges – both immediate and on the horizon. World Rugby's competition model

and underlying business model is heavily skewed. Currently the organisation is highly-g geared to the commercial success of the men's Rugby World Cup. This in turn is highly dependent on a select few commercial markets and potential hosts. The competition portfolio overall requires some rationalisation, as well as a stronger narrative across the range of events. With the organisation's success being intrinsically linked to the health of the sport and its member unions, it needs to continuously seek understanding and cooperation at a strategic

level. Finally, and, perhaps inescapably as an international federation and arbiter of the game, World Rugby can be perceived to be at the root of any issues the sport faces – in any form, anywhere – by a range of stakeholders.

The purpose of this strategic plan is to set out how World Rugby proposes to act, behave and deliver in the coming decade. How we intend to embrace opportunities and tackle challenges in a united fashion, and thus bring benefit to the whole sport.





# VALUES, VISION AND PURPOSE





## OUR VALUES

Inherent in everything we do are our values of **integrity, respect, solidarity, passion and discipline**. These values were developed in partnership with our member unions at the 2009 General Assembly and have stood the test of time.

### INTEGRITY

Integrity is central to the fabric of the game and is generated through honesty and fair play

### RESPECT

Respect for team-mates, opponents, match officials and those involved in the game is paramount

### SOLIDARITY

Rugby provides a unifying spirit that leads to lifelong friendships, camaraderie, teamwork and loyalty which transcends cultural, geographic, political and religious differences

### PASSION

People have a passionate enthusiasm for the game. rugby generates excitement, emotional attachment and a sense of belonging

### DISCIPLINE

Discipline is an integral part of the game both on and off the field and is reflected through adherence to the laws, the regulations and rugby's core values

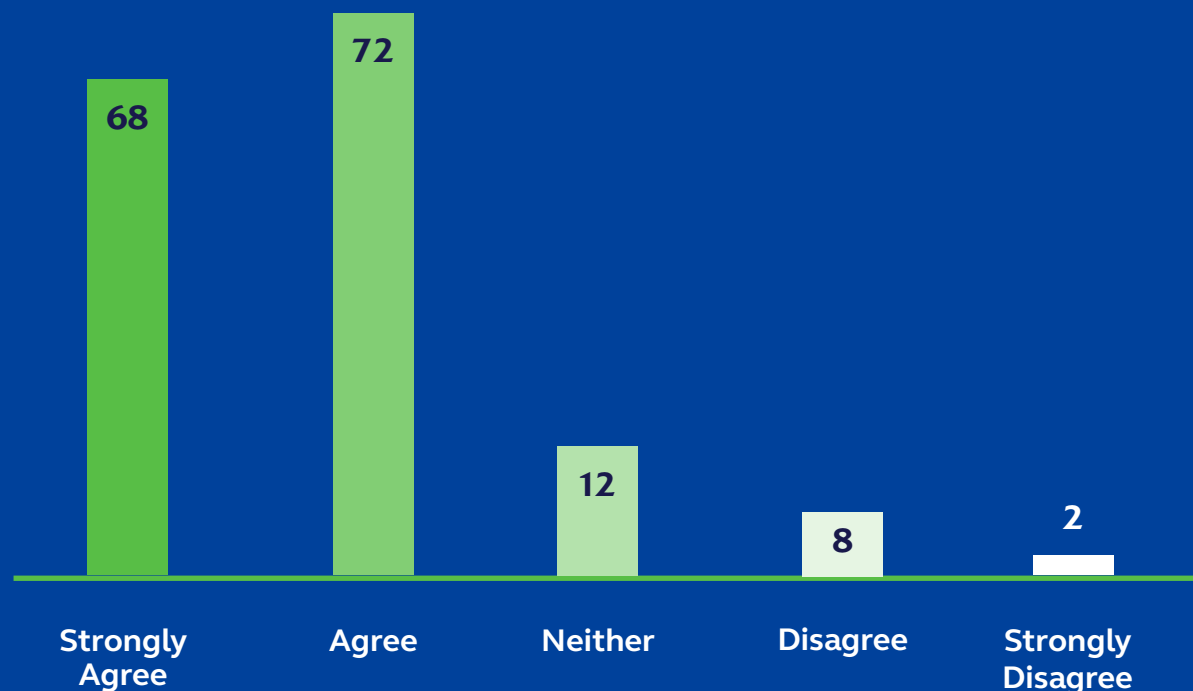


World Rugby recently canvassed its Executive Committee, Council, colleagues, unions, regional associations and partner bodies as to their views on these values. The vast majority - some 87 per cent - see these values as world-leading.

It was particularly positive that as well as feeling that the values themselves were powerful, those within the sport also see them as being strongly adhered to. However, World Rugby needs to ensure this positive view is maintained and also consider how these values translate and resonate to those outside the sport. They are an important differentiator in the competitive audience-engagement landscape and fundamental to the image of the sport and its ability to attract new participants and fans.

Integrity is central to the fabric of the game and is generated through honesty and fair play

## Values and Adherence to Values



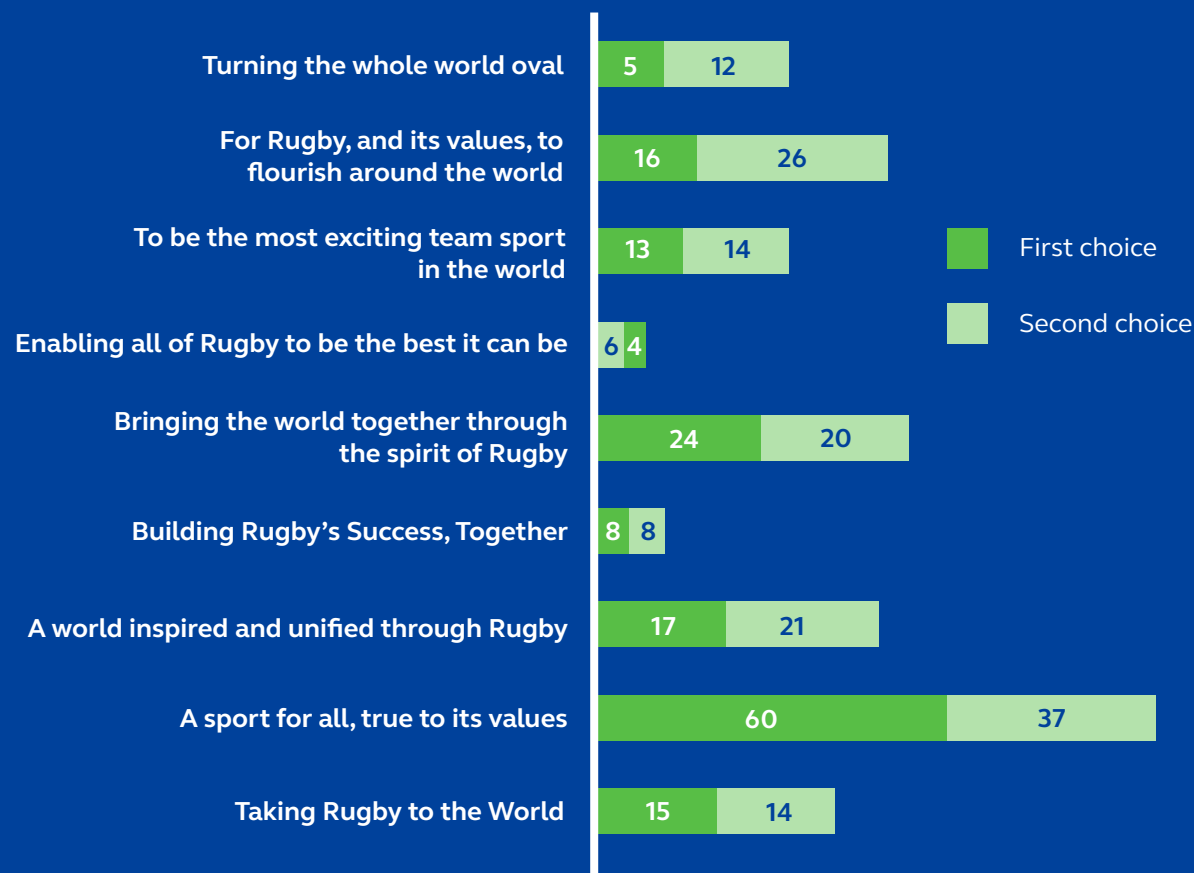
**Q:** In comparison to the other sports, how strongly do you agree/disagree with the following statements: 'Rugby Union leads the sporting world in terms of'...

## OUR VISION: A GLOBAL SPORT FOR ALL – TRUE TO ITS VALUES

World Rugby's Vision of driving a Sport for all – true to its values has been in place for a decade. That facet of the sport – being suitable for all shapes and sizes, wanting to be inclusive and provide a home for everyone and anyone – remains as strong today as it did 10 years ago. When asked to consider alternative ambitions, respondents from within the sport remain wedded to this Vision.

What has changed in the last decade is our experience. The men's Rugby World Cup in Japan showed the potential for the sport to look beyond its traditional homelands, to activate new markets. This ambition drives our renewed Vision, to become a global sport for all – true to its values.

Please consider the following hypothetical vision statements. Choose the two that you feel best capture a suitable vision for the sport



*Note: Several of these paraphrase other sports and rugby bodies*



## OUR PURPOSE: GROWING RUGBY BY MAKING IT MORE RELEVANT AND ACCESSIBLE

Having clarity of purpose is crucial to World Rugby's success. How can the organisation genuinely realise its vision of A sport for All – true to its values? How does it define its role vis-à-vis the other organisations operating in rugby's busy landscape?

As a membership organisation World Rugby's core role is to serve and support its member unions and regional associations. Their health and success is an indicator of World Rugby's success. As the sport's regulator, law-maker, key funder and operator of many of its leading competitions, World Rugby can best serve the sport by ensuring that it remains relevant and accessible in the decade ahead.

Being accessible – to participants, spectators and audiences – means that player welfare concerns are addressed to make the sport ever-safer, ensuring the sport is open and inclusive, that high-quality, appealing content is readily available to fans new and old, that competition structures are exciting, engaging and effective, and that unions have appropriate capability and capacity.

Being relevant means ensuring that the sport is attractive, that people are aware of it and what it offers, that it chimes with 21st century lifestyles, behaviours and values.

This Strategic Plan sets out how we plan to fulfil this purpose and deliver our vision.





# WORLD RUGBY STRATEGIC PLAN





## STRATEGIC FRAMEWORK

Developing a new strategic plan against the uncertain and ever-changing backdrop has been challenging. Developing it in the current virtual working environment has also brought both benefits and challenges. In order to help shape discussion, assemble ideas and consider future communication, the following framework has been developed and adopted by World Rugby's Executive Committee.

This framework forms the structure for the Strategic Plan as described below, section by section.



## COMPETITION

Like many international federations, global and regional competitions are at the heart of what World Rugby is about. Rugby is recognised as a sport that organises such competitions well, to the benefit of athletes, officials, spectators, audiences, hosts and partners.

As the sport has grown so has the range of competitions, as World Rugby has sought to satisfy demand wherever it can. Although all World Rugby events earn revenues through some combination of gate receipts, hospitality, sponsorship, merchandising and broadcast, only one – the men's Rugby World Cup – generates a net income for World Rugby. In order to ensure that its portfolio can be financially sustainable

going forwards World Rugby will need to do two things:

1. Ensure that all current and future competitions are considered carefully in terms of what they deliver for the sport and;
2. Financial support for each event should be tailored to its requirements, which in some cases may mean marketing and broadcast spend, for example, is focused where it is most appropriate.

Growing and diversifying revenues from our competitions must be a priority for World Rugby if investment in the growth of the game is to be maintained and increased in the decade to come.

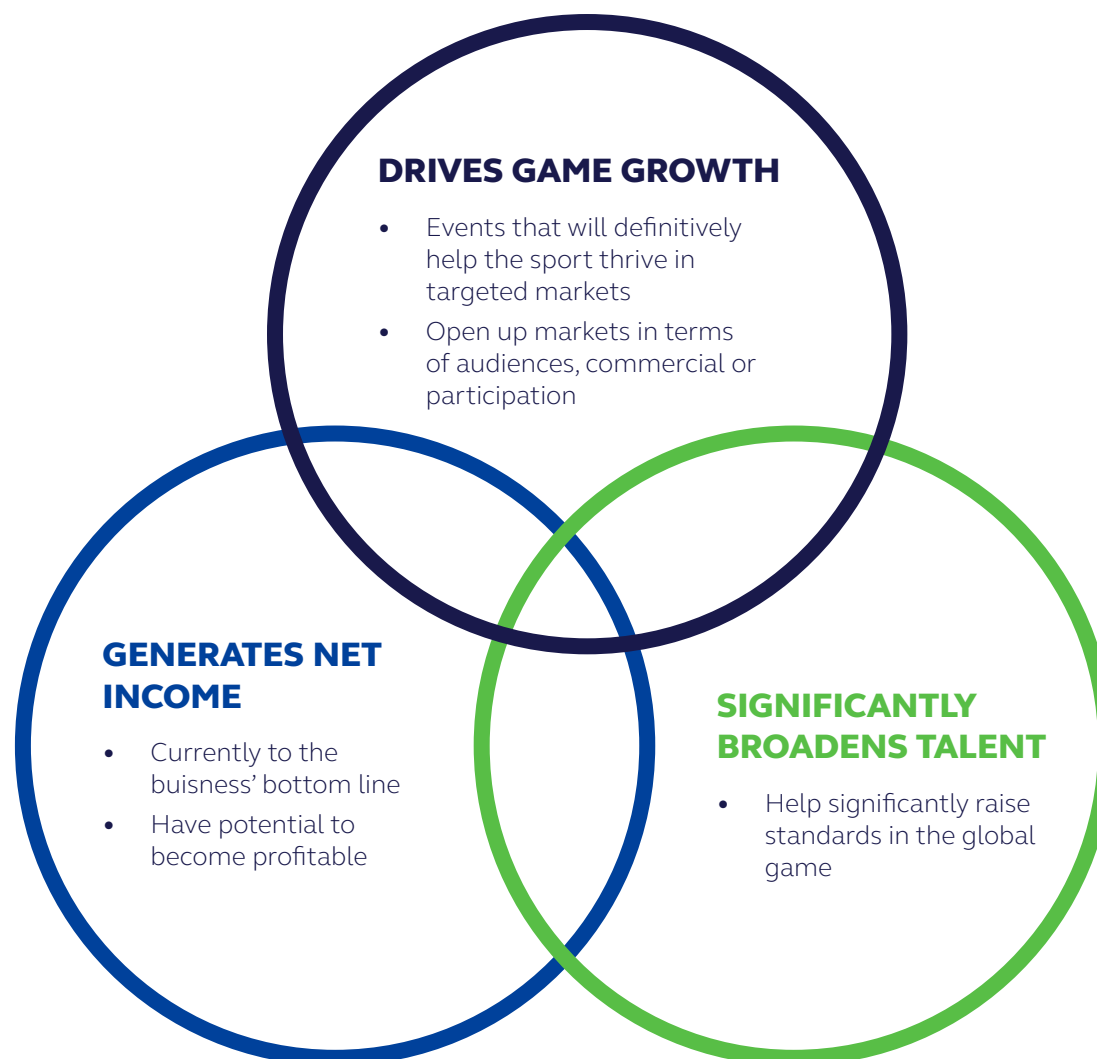


## COMPETITION CATEGORISATION

Previous attempts at categorising competitions have been based on the level of competition – e.g. pinnacle v age-group. The approach being adopted now by World Rugby is to very much focus on the core purpose of each event or competition – is it to generate net income, is it to broaden the talent base or is it to drive game growth? Some competitions may be striving to do all three (and possibly succeed) but in practice most will benefit from having their core purpose identified and focused upon. This approach enables the level of investment – particularly in marketing, broadcast and content production – to be targeted where it is most effective (e.g. towards events more likely to drive game and audience growth). It will also ensure that World Rugby's strong track record of working with partners to successfully operate and deliver competitions will continue.

Categorising competitions in this way also enables us to consider adapting the approach we take for specific competitions such as the U20 Championship and HSBC World Rugby Sevens Series.

## Proposed approach for categorising competitions



## RAISING STANDARDS AND COMPETITIVENESS

One indicator of the health of a sport is how competitive it is. If we are to fulfil an ambition of creating 'A global sport for all' then we need to see more nations having the opportunity and ability to compete at higher levels, all the way up to Rugby World Cup. High Performance investment will target sustained improvements in capability and pinnacle performance, especially where they lead to a potential economic return for the sport.

Looking at the current portfolio we can identify some clear gaps that are holding the global game back. In particular, the lack of competition pathways for elite women's 15s, and for men's 15s in emerging nations have been identified as barriers to raising competitive levels. World Rugby intend to address these two issues by launching new international competitions in both areas.



## THE GLOBAL CALENDAR

Currently only 46 per cent of international matches played are 'meaningful' in a competitive sense. With all the evidence showing that fans, spectators and audiences find competitive fixtures more compelling World Rugby will continue to work with stakeholders - as it has done during the 2020 COVID-19 pandemic – to improve the current situation and develop competition models and formats that drive growth. As well as the calendar itself, World Rugby will also seek to work with partners to help improve the annual narrative of the sport in the eyes of its followers around the world. By working together and cross-promoting as far as possible all stakeholders stand to gain from an improved awareness and appetite amongst fans and new audiences alike.

	STATE OF PLAY	GAME CHANGERS	MATCH RESULTS
COMPETITION PORTFOLIO	<ul style="list-style-type: none"> <li>Majority of events not self-sufficient</li> <li>One-size fits-all approach to marketing and broadcasting events is unsustainable and inefficient</li> </ul>	<ul style="list-style-type: none"> <li>Reconfigure portfolio around three categories               <ul style="list-style-type: none"> <li>Profit-making</li> <li>Broadening the talent base</li> <li>Generating game growth</li> </ul> </li> <li>Broadcasting and marketing investment to match event role</li> <li>Reset for Sevens Series</li> </ul>	<ul style="list-style-type: none"> <li>Major events such as RWC 2021, Olympics and RWC 2023 even more successful than preceding versions</li> <li>By 2025 World Rugby has a more balanced portfolio with fewer competitions needing significant subsidisation</li> <li>A relaunch of the Sevens Series by 2022 which works for players, the sport and finances</li> </ul>
STANDARDS AND COMPETITIVENESS	<ul style="list-style-type: none"> <li>High Performance support required by many unions</li> <li>Lack of suitable opportunities for emerging nations and the women's game</li> </ul>	<ul style="list-style-type: none"> <li>HP remains targeted at ensuring sustainable competitiveness levels</li> <li>New annual women's and men's emerging nations competitions</li> </ul>	<ul style="list-style-type: none"> <li>HP-supported unions deliver competitive performances at RWCs and Olympics</li> <li>New men's and women's competitions launched by 2022</li> </ul>
GLOBAL CALENDAR	<ul style="list-style-type: none"> <li>Only 46% of international fixtures are 'meaningful'</li> <li>Sport suffers from a lack of compelling annual narrative</li> </ul>	<ul style="list-style-type: none"> <li>Work with stakeholders to build a compelling narrative and cross-promotion for the sport across the international and club games</li> </ul>	<ul style="list-style-type: none"> <li>Development of a more compelling competition structure that delivers more meaningful matches by 2024</li> <li>A more unified approach to promoting the international competition cycle</li> </ul>





## PARTICIPATION

### RETENTION

With much of the focus currently on the impact of COVID-19 on the sport's finances we shouldn't forget the enormous impact that's been felt by the game's grassroots. With so little community rugby union – particularly of the contact kind – being played during 2020, there's a risk that a whole generation of players have lost the 'habit' of playing. The rationale to focus attention on keeping people in the game

as much as attracting them has heightened considerably. Keeping facilities, clubs and opportunities to play available will be a big part of the recovery programme from 2021 onwards. World Rugby's role here is to support players, coaches, officials and clubs by building the capacity and capability of their unions and regional associations. As ever, player welfare continues to be priority number one throughout our participation plans.

## WOMEN'S RUGBY

As we approach the halfway stage of the World Rugby 2017-25 Women's Development Plan there's little doubt that the women's game, and indeed the role of women in the game, has been transformed. More young women have been getting into rugby each year than men, with over a quarter of participants now being female. However, there remains considerable progress to be made – in all areas from leadership to competition, from the grassroots to commercial aspects. World Rugby is committed to the success of women's rugby as it represents the single biggest opportunity to grow the sport. As well as developing the new women's annual international tournament World Rugby will review its Women's Plan during 2021 to ensure it is fit for purpose and sufficiently stretching. Maintaining funding of the women's game – especially in these challenging times – is a stated priority for World Rugby and was made a condition of its recent COVID-19 relief

programme. We will seek to build upon and extend the success of the 'Try and Stop Us' marketing campaign. And finally, although we as an organisation and the sport as a whole has far more women involved in the sport – including at leadership levels – than ever before, we will look at how to accelerate this.





## GROWTH MARKETS

Although a global sport with World Rugby now having 128 full and associate members, participation in rugby union remains a niche activity in most countries. World Rugby aims to continue the broad global development of the game by working with unions and regional associations to build their capacity and capability. It is through our support of unions in this manner, rather than direct action, that we can best build sustainable growth.

Commercially, rugby lacks the universal presence of say football, and unlike cricket (with India) or basketball (with the USA and China), does not have an economic powerhouse market to rely upon. The sport as a whole – and all of its stakeholders – would benefit if a virtuous circle of participation, audience, fan, high performance and commercial success could be generated in major markets. As we are currently doing with USA Rugby, Major League Rugby and other stakeholders, we will seek opportunities to work with unions and commercial partners to build sustainable growth for the benefit of the whole sport.

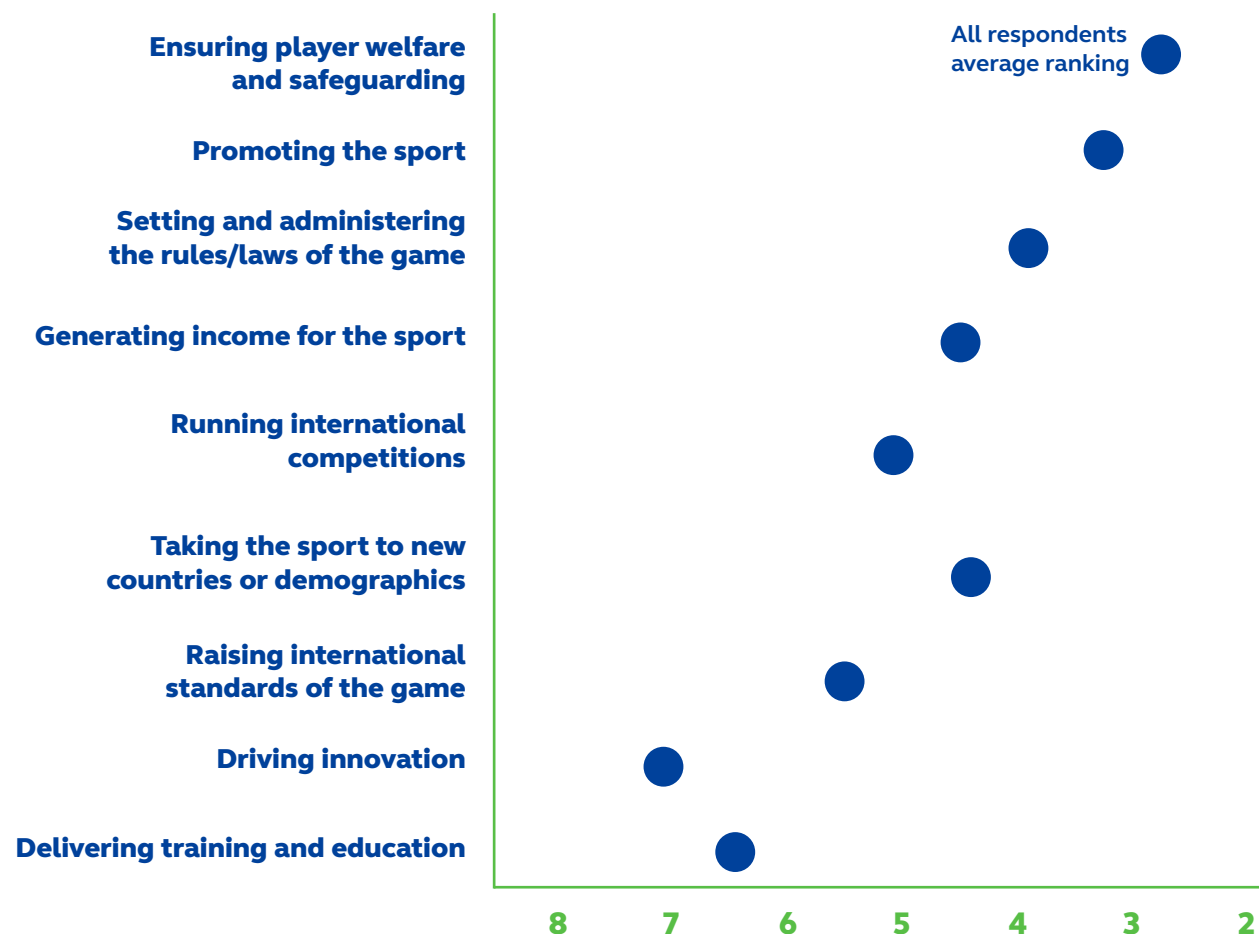
	STATE OF PLAY	GAME CHANGERS	MATCH RESULTS
RETENTION	<ul style="list-style-type: none"> <li>80% of participation occurs in the top 20 countries</li> <li>Covid-19 has devastated community clubs and changed habits</li> </ul>	<ul style="list-style-type: none"> <li>Union Fund maintained to the benefit of participants in current major markets</li> <li>Increase capacity of unions to sustain participants (players, coaches, officials, support staff, volunteers)</li> <li>Behavioural insight and intelligence shared between stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>The sport is able to recover the ground lost through the Covid-19 pandemic by 2023, and reach 10m overall participants (5m active players across 15s and sevens) by 2025</li> </ul>
WOMEN'S RUGBY	<ul style="list-style-type: none"> <li>Currently halfway through 2017-25 Plan</li> <li>Participation and presence greatly improved but still plenty of opportunity to activate further</li> </ul>	<ul style="list-style-type: none"> <li>Union Fund to target female participation in established markets</li> <li>Women's Rugby plan to be reviewed in 2021</li> <li>Extend and embed Try and Stop Us global marketing campaign</li> <li>Participation and leadership programmes to be developed and implemented in partnership with Unions and Regional Associations</li> </ul>	<ul style="list-style-type: none"> <li>An updated Women's Rugby Plan to be produced in 2021</li> <li>Further editions and evolutions of the Try and Stop Us global marketing campaign to help drive awareness and interest in women's rugby</li> </ul>
GROWTH MARKETS	<ul style="list-style-type: none"> <li>Participation still highly skewed – a few saturated markets vs many with low rates</li> <li>Capacity-building is the best way for World Rugby to support broad growth</li> </ul>	<ul style="list-style-type: none"> <li>Target markets to be identified and supported on the basis of participation potential, union capability and capacity, commercial sustainability, and High Performance potential</li> </ul>	<ul style="list-style-type: none"> <li>Working in partnership World Rugby to activate one major new market for the sport by 2025</li> </ul>

# ENGAGEMENT

## BRAND RUGBY

One of the strong messages that came out of the 2019 World Rugby General Assembly was the desire to see the sport – and all its benefits – more widely-recognised and promoted. Similarly, the recent stakeholder survey saw ‘promoting the sport’ as second only to player welfare as a priority for World Rugby. While some major unions have sophisticated research, insight and marketing tools and functions, most are not resourced in this way. World Rugby believes it can play a role both in facilitating knowledge-sharing across the sport as well as generating insight and materials for regional associations and unions to deploy to their benefit. These could range from marketing materials and communications toolkits through to evidence-based research on the benefits of rugby. We must also understand and champion the health and social benefits of participation, crucial to government funding, curriculum inclusion and parental decision-making. World Rugby will work in partnership with its stakeholders to identify what is required in this area.

Considering the traditional roles of an International Federation, please put the following in order of importance for World Rugby



## STAKEHOLDER RELATIONS

While World Rugby does have – via its competitions and media – a direct relationship with participants, players, officials and fans, much of what it does is in partnership with key stakeholders – particularly regional associations, member unions, organisations like International Rugby Players, and commercial and broadcast partners. In the main these relationships are healthy, being built around a common passion for the sport and shared values. However, World Rugby should always be looking to understand and service its partners as well as it can – given how much of what it does is ‘business-to-business (B2B)’. Looking ahead we plan to introduce two approaches which we believe will improve further what we do here:

1. Implement and utilise a Customer Relationship Management (CRM) system which will enable us to communicate and work with stakeholders better than ever before; and,
2. Create an annual ‘State of the Union’ survey which will invite all stakeholders to assess how we are performing in different areas.

Crucially, both these measures will enable us to better understand the genuine needs of our partners, and therefore address them.



## AUDIENCE ENGAGEMENT

World Rugby’s ability to reach audiences and engage them has transformed over the past decade. And despite the sporting hiatus created by COVID-19 we continue to provide news and content to followers of the sport around the world. These efforts are not altruistic. Building audiences and engaging them is crucial to

World Rugby’s – and the sport’s – commercial future.

The commercial, broadcast and content strategy for World Rugby over the next decade will be focused on growing rugby’s audiences around the world, delivering compelling and relevant content to fans and developing new and increased revenues for re-investment in the game.

	STATE OF PLAY	GAME CHANGERS	MATCH RESULTS
<b>MARKETING THE SPORT AND BRAND RUGBY</b>	<ul style="list-style-type: none"> <li>Relative to other activities, the sport suffers from concerns over safety and its complexity</li> <li>Currently a minority sport in most markets</li> </ul>	<ul style="list-style-type: none"> <li>Create and distribute a toolkit that will help partners promote the sport</li> <li>Build and maintain ongoing media campaign about the benefits of the sport and management of safety aspects</li> </ul>	<ul style="list-style-type: none"> <li>Independent annual research to show enhanced perceptions as well as a 10% increase in global Followers and Fans by 2025</li> </ul>
<b>STAKEHOLDER RELATIONSHIP MANAGEMENT</b>	<ul style="list-style-type: none"> <li>World Rugby is primarily a B2B operation – working with Unions, Regional Associations, commercial and other partners</li> </ul>	<ul style="list-style-type: none"> <li>Implementing a cross-platform relationship and communication platform to engage through all touchpoints</li> <li>World Rugby will survey partners for regular feedback – and act upon it</li> </ul>	<ul style="list-style-type: none"> <li>Annual ‘State of the Union’ survey to set and monitor World Rugby Net Promoter Scorew</li> </ul>
<b>AUDIENCE ENGAGEMENT</b>	<ul style="list-style-type: none"> <li>Participation still highly skewed – a few saturated markets vs many with low rates</li> <li>Capacity-building is the best way for World Rugby to support broad growth</li> </ul>	<ul style="list-style-type: none"> <li>Evolving to an ‘always-on’ content approach looking beyond specific events</li> <li>Formal data strategy will seek to create insight and value</li> </ul>	<ul style="list-style-type: none"> <li>Value of audience engagement activity to increase by 50% by 2025</li> </ul>

In the main audience engagement has been built through servicing the World Rugby tournament portfolio from a build-up, coverage and reporting perspective. This encompasses more than 20 annual events. Looking ahead we envisage this approach evolving in four key aspects:

1. We will adapt coverage and content to reflect the status of each competition – those more

focused on commercial activity and/or driving game growth will be supported more strongly.

2. Building on the lessons of the past six months’ hiatus we will look to have more of an ‘always-on’ presence thus building interest, attention and engagement in between events.

3. We aim to develop highly-resonant creative content that can cut through to an audience

beyond the traditional rugby world, to the benefit of the whole sport.

4. As well as building audiences for direct commercial return, we will also develop a data strategy to ensure that insight and value from audience data are being maximised – we will need to be more “direct-to-consumer” in our approach.



## THE GAME (PRODUCT)

Underpinning and driving Competitions, Participation and Engagement is the critical building block of the game itself. World Rugby has purposefully termed this pillar of work as ‘Product’ to reflect the need and desire to think about the game as an entertainment form as well as a sport. In order to succeed the sport must take a look at itself through multiple prisms – from administrators, players, and participants, through to spectators, audiences and partners too.

### PLAYER WELFARE AND EXPERIENCE

A consistent number one priority for World Rugby is the issue of player welfare – from the elite end of the game through to the grassroots. Ensuring the safety and welfare of players is our top concern. World Rugby prides itself on its commitment, investment and stringent processes in this area. Our ambition is to enhance this unrelenting focus by delivering even more leadership, and driving even greater collaboration

working hand-in-hand with unions and player bodies.

Recruitment and retention are inextricably linked to the quality of the player and match experience. World Rugby recognises this and will partner with regional associations and unions to enhance its efforts in training and education to support the development of coaches, match officials, medics and administrators throughout the pathway. The recent experience of moving much of this effort digitally during the pandemic will be built upon to extend the reach of such services, where feasible.

### FORMS OF THE GAME – ACCESSIBILITY

World Rugby sees the 15s game as a core part of the sport’s future and in established rugby markets it is how at least two-thirds of people first get involved in the sport. But in emerging markets, while 15s and sevens drive around a third of interest apiece, other formats such as Touch and Tag, or Beach and Snow, also entice and enthrall





## EXPERT AND AUDIENCE INPUT

World Rugby recognises the depth and range of expertise within the game and intends to enhance how it taps into this. More and more Council members are now bringing their experience and insight to World Rugby's committees, and they are increasingly being joined by players, player representatives, coaches and other experts from right across the sport. The current Governance Review of our Committee structures and procedures will look to build upon this and ensure that in the future World Rugby benefits from a range of views and expertise.

Similarly, we know how important it is that our competitions and content meet audience expectations, if not exceed them. We need insight and innovation as never before. World Rugby recognises that it does not have a monopoly on understanding what works for audiences. During 2020 we have set up a Fan Panel which enables us – and our partners – to test out concepts and changes, where appropriate. We will increasingly couple this with wider communication to potential fans to help inform decisions. This approach – always having the player or (potential) fan at the forefront of our mind – is essential for us to cut through the very cluttered and competitive landscape we operate in.

newcomers. As the landscape for participants, audiences, sponsors and hosts gets ever more competitive it would be remiss of World Rugby not to look at how the sport must evolve to fit in around modern lifestyles. A careful balance needs to be struck here between looking to enhance the sport's offer, without making it appear more fragmented, and also between acknowledging the local market expertise of unions, and supplementing it. The strategy consultation process has helped identify a number of areas where World Rugby believes it could make a difference:

In response to the views expressed by Development Directors, World Rugby intends to assist emerging nations by developing and sharing the sort of non-contact products that many established unions use to both introduce players to the sport and also sustain their involvement. This is a particularly pertinent issue given the current pandemic.

World Rugby intends to work with stakeholders to look at how the community game should evolve so as to remain as accessible and attractive to participants as possible. We will build upon the recent union-led development of 'Game On' guidelines, which offer a far more flexible approach to the laws of the game in order to help fixtures to take place. Developing a 'Community Code' that unions can adopt or adapt as appropriate will help the sport – at the community level – respond to the challenges of being a 21st century sport.

	STATE OF PLAY	GAME CHANGERS	MATCH RESULTS
<b>PLAYER WELFARE AND EXPERIENCE</b>	<ul style="list-style-type: none"> <li>Player welfare viewed as a leading priority for the sport and World Rugby</li> <li>Need to promote a pathway of lifelong participation to include and recognize support roles such as coaching, match officiating, medical and administration</li> </ul>	<ul style="list-style-type: none"> <li>Sustained investment into an ongoing programme of researching a range of physical and mental player welfare concerns, as well as law review, trial and change processes</li> <li>Target further injury prevention and injury management initiatives</li> <li>Develop a broad range of Training &amp; Education material to support the development of coaches, match officials, medics and administrators throughout the pathway.</li> </ul>	<ul style="list-style-type: none"> <li>Independent research to show that Rugby is perceived as a world leading sport in assessing and addressing player welfare issues</li> <li>Injury incidence and severity rates continue to stabilise</li> <li>Game metrics e.g. Ball in play, tries, passes, dead time continue to improve.</li> <li>By 2025 develop 1 coach for every 15 players, 1 medic and 1 administrator per squad of players, 1 qualified match official for every match, 1 administrator per union</li> </ul>
<b>FORMS OF THE GAME</b>	<ul style="list-style-type: none"> <li>The sport currently features a number of alternative formats, stages and player numbers</li> <li>Opportunities need to reflect modern lifestyles as much as possible</li> </ul>	<ul style="list-style-type: none"> <li>World Rugby will work with relevant Unions to create a non-contact product that can be deployed where appropriate</li> <li>Building on the success of 'Game On' a more flexible and practical 'Community Code' is developed for 15s</li> </ul>	<ul style="list-style-type: none"> <li>During 2021-25 World Rugby to develop and deploy a non-contact product offering with emerging Unions</li> <li>'Community Code' to be rolled out from end-2021 onwards</li> </ul>
<b>EXPERT AND AUDIENCE INPUT</b>	<ul style="list-style-type: none"> <li>Players, coaches, officials and fans are at the heart of the sport</li> <li>The more that decisions - where relevant in the community and professional game - are informed by their views, the better</li> </ul>	<ul style="list-style-type: none"> <li>More player and expert input than ever before, via World Rugby Committees, consultations and its relationship with bodies such as International Rugby Players</li> <li>A Fan Panel and wider research tools will be utilised to assess audience appetite</li> </ul>	<ul style="list-style-type: none"> <li>A 360° approach to thinking about the game will become the norm – interventions will only be implemented if they've been appropriately tested</li> </ul>



## WAYS OF WORKING



As described earlier World Rugby is a well-respected international federation and its values continue to resonate. However, in delivering this Strategic Plan we need to consider how it operates going forwards.

### A RESPONSIBLE PARTNER

World Rugby cannot deliver its purpose without the support of others, be they regional associations, unions, partner organisations or commercial partners. In order to earn and retain that support World Rugby recognises that it needs to continue being seen as a responsible partner – one you would want to and feel safe doing business with. Three areas of initial focus will be Diversity and inclusion, Sustainability and Governance.

#### *Diversity and inclusion*

Rugby prides itself on being a sport for all shapes and sizes, a sport for all. World Rugby would like to see itself in a similar way. Great strides have been made in recent years – particularly in the area of female representation – but there remains progress to be made. World Rugby has already started the process of looking internally at how it can improve diversity and inclusion in all it does. As well as being the right thing to do this is also a business imperative for an organisation and sport

that wants to reach new demographics and markets. How an organisation communicates – both internally and externally – is key to success. Especially for an organisation such as World Rugby where so much of what we do is ‘business-to-business’ in nature. World Rugby will aspire to use inclusive and collaborative language and tone. For example, we shall no longer refer to ‘tier one’ and ‘tier two’ unions and our portrayal guidelines will reflect the world we wish to connect with.

#### *Sustainability*

Most organisations are analysing their own and their stakeholders’ environmental credentials through formal processes to determine future collaboration. Commercial partners are increasingly mindful of business practices and consumption patterns. In recent years, World Rugby has introduced a variety of environmental and social sustainability measures to get our own house in order, to the point where our actions have been recognised by the UN, IOC, GAISF and other international federations. However, this is not the time to rest on laurels. World Rugby will look to use the UN Sports for Climate Action Declaration and Framework to help shape its actions going forwards.

## WORLD RUGBY STRATEGIC PLAN

### *Governance*

Assessment by the Association of Summer Olympic International Federations as well as Nielsen research shows that World Rugby is well-regarded for governance. In order to ensure that this continues an independently-chaired Governance Review is currently taking place and will make recommendations during 2021.

### **COMMERCIALLY-MINDED**

Without increased revenues, World Rugby will not be able to invest at the levels required to grow rugby globally. World Rugby has enjoyed sustained revenue growth over the past decade – driven primarily by the success of the men's Rugby World Cup. Despite the current commercial climate, a focus on driving value can help us generate the income necessary for the sport to flourish.

### *Maximise rights value*

We will maximise rights values by developing our rights proposition and increase the yield from our growing digital assets. We will unbundle rights and establish women's rugby as a standalone commercial programme. As with many other sports bodies we intend to leverage data further to support our business and our partnerships.

### *De-risk our business*

By building direct relationships, in-house

expertise and greater control over rights delivery, we will reduce our reliance on third parties and the risk of key agency personnel leaving. We will also prioritise longer deals across more properties.

### **AN EFFICIENT AND EFFECTIVE ORGANISATION**

### *Fit for purpose*

As the strategic direction of World Rugby evolves so must the shape of the organisation itself. During 2021 we will conduct a People and Organisation Review to ensure we have the relevant skills, experience, structure and systems aligned to successfully deliver our priorities. We will also look to build upon the recent experience of working virtually to think more creatively about how we organise our work and deliver.

### *Drive efficiency*

As well as the afore-mentioned plan to develop the in-house commercial unit instead of relying on agencies and rising commissions costs, we will also seek cost efficiencies where possible. For example, we will look at outsourcing areas such as resource-intensive tournament time delivery. Overall we will look to cap operating costs as a proportion of revenues at their current levels. This will allow us to both provide sufficient services to the sport as well as maximise the investment available.



	STATE OF PLAY	GAME CHANGERS	MATCH RESULTS
<b>RESPONSIBLE</b>	<ul style="list-style-type: none"> <li>Pressure from commercial partners to ensure we continue to be seen as an attractive partner</li> <li>Requirement to set a leadership example for the sport in terms of governance</li> </ul>	<ul style="list-style-type: none"> <li>An extensive range of diversity measures – across recruitment and retention, communications, portrayal, monitoring – to be activated</li> <li>World Rugby to create and publish a formal Sustainability Charter, based around the UN Sports for Climate Action Declaration and Framework</li> <li>Independent Governance Review taking place</li> </ul>	<ul style="list-style-type: none"> <li>World Rugby to report and action diversity and inclusion metrics</li> <li>Sustainability Charter in place by end of 2021 and performance reviewed on an annual basis</li> <li>Governance Review to conclude during 2021 and recommendations be implemented by 2024</li> </ul>
<b>COMMERCIAL</b>	<ul style="list-style-type: none"> <li>Strong track record in sponsorship and broadcast activation around men's RWC</li> <li>Potential to drive greater value through more control and digital in particular</li> </ul>	<ul style="list-style-type: none"> <li>Increased digital offer and yield</li> <li>Women's rugby commercial programme to launch</li> <li>Developing and deploying in-house expertise</li> </ul>	<ul style="list-style-type: none"> <li>Digital sponsorship revenues to double by 2025</li> <li>£5m reduction in cost of sales by 2025</li> <li>Budgeted commercial revenue targets to be hit</li> </ul>
<b>EFFICIENT AND EFFECTIVE</b>	<ul style="list-style-type: none"> <li>New strategic plan will require the organisation to evolve</li> <li>To maximise both support offered and investment into the game we must balance having sufficient capability and capacity, with being as lean as possible</li> </ul>	<ul style="list-style-type: none"> <li>People and Organisation review to be conducted and implemented</li> <li>All functions to be delivered in most efficient way – whether in-house or outsourced</li> </ul>	<ul style="list-style-type: none"> <li>Organisational capability and delivery to be assessed annually through stakeholder and colleague feedback</li> <li>Operating costs to be monitored relative to revenue</li> </ul>



# THE STRATEGIC PLAN ON A PAGE



This new Strategic Plan will drive the organisation forwards from 2021 onwards. It is a plan for World Rugby as an organisation, based around a Vision and Purpose endorsed by our stakeholders. It will be implemented through a series of annual priorities set by the organisation's Executive Committee. And while it is envisaged that the framework set out here – Competition, Participation, Engagement, Product, Ways of Working – should remain in place for the next decade, given the pace of change in the sector, the content of these pillars should be reviewed within the next five years.

<b>Vision</b>	A global sport for all - true to its values		
<b>Purpose</b>	Growing rugby by making it more relevant and accessible		
<b>Values</b>	INTEGRITY • RESPECT • SOLIDARITY • PASSION • DISCIPLINE		
<b>Pillars</b>	<b>Competition</b> <ul style="list-style-type: none"> <li>• Optimise the portfolio</li> <li>• Raise standards and competitiveness</li> <li>• Build the global calendar</li> </ul>	<b>Participation</b> <ul style="list-style-type: none"> <li>• Drive retention</li> <li>• Grow women's rugby</li> <li>• Target growth markets</li> </ul>	<b>Engagement</b> <ul style="list-style-type: none"> <li>• Promote brand rugby</li> <li>• Enhance stakeholder relations</li> <li>• Drive audience engagement and value</li> </ul>
	<b>The Game (our product)</b> <ul style="list-style-type: none"> <li>• Player Welfare &amp; experience</li> </ul>	<ul style="list-style-type: none"> <li>• Forms of the game</li> </ul>	<ul style="list-style-type: none"> <li>• Utilise expert and audience input</li> </ul>
<b>Culture</b>	<b>Ways of Working</b> <ul style="list-style-type: none"> <li>• Responsible</li> <li>• Commercial</li> <li>• Efficient and Effective</li> </ul>		





# WORLD RUGBY SCORECARD



## MATCH RESULTS SUMMARY

COMPETITION	PARTICIPATION	ENGAGEMENT	PRODUCT	WAYS OF WORKING
<ul style="list-style-type: none"> <li>Major events such as RWC 2021, Olympics and RWC 2023 even more successful than preceding versions</li> <li>By 2025 World Rugby has a more balanced portfolio with fewer competitions needing significant subsidisation</li> <li>A relaunch of the Sevens Series by 2022 which works for players, the sport and finances</li> </ul>	<ul style="list-style-type: none"> <li>The sport is able to recover the ground lost through the COVID-19 pandemic by 2023, and reach 10m overall participants (5m active players across 15s and sevens) by 2025</li> </ul>	<ul style="list-style-type: none"> <li>Independent annual research to show enhanced perceptions as well as a 10% increase in global Followers and Fans by 2025</li> </ul>	<ul style="list-style-type: none"> <li>Independent research to show that rugby is perceived as a world leading sport in assessing and addressing player welfare issues</li> <li>Injury incidence and severity rates continue to stabilise</li> <li>Game metrics e.g. Ball in play, tries, passes, dead time improve.</li> <li>By 2025 develop 1 coach for every 15 players, 1 medic and 1 administrator per squad of players, 1 qualified Match Official for every match, 1 administrator per Union</li> </ul>	<ul style="list-style-type: none"> <li>World Rugby to report and action diversity and inclusion metrics</li> <li>Sustainability Charter in place by end of 2021 and performance reviewed on an annual basis</li> <li>Governance Review to conclude during 2021 and recommendations be implemented by 2024</li> </ul>
<ul style="list-style-type: none"> <li>HP-supported Unions deliver competitive performances at RWCs and Olympics</li> <li>New men's and women's competitions launched by 2022</li> </ul>	<ul style="list-style-type: none"> <li>An updated Women's Rugby Plan to be produced in 2021</li> <li>Further editions and evolutions of the Try and Stop Us global marketing campaign to help drive awareness and interest in women's rugby</li> </ul>	<ul style="list-style-type: none"> <li>Annual 'State of the Union' Survey to set and monitor World Rugby Net Promoter Score</li> </ul>	<ul style="list-style-type: none"> <li>During 2021 -25 World Rugby to develop and deploy a non-contact product offering with emerging unions</li> <li>'Community Code' to be rolled out from end-2021 onwards</li> </ul>	<ul style="list-style-type: none"> <li>Digital sponsorship revenues to double by 2025</li> <li>£5m reduction in cost of sales by 2025</li> <li>Budgeted commercial revenue targets to be hit</li> </ul>
<ul style="list-style-type: none"> <li>Development of a more compelling competition structure that delivers more meaningful matches by 2024</li> <li>A more unified approach to promoting the international competition cycle</li> </ul>	<ul style="list-style-type: none"> <li>Working in partnership World Rugby to activate one major new market for the sport by 2025</li> </ul>	<ul style="list-style-type: none"> <li>Value of audience engagement activity to increase by 50% by 2025</li> </ul>	<ul style="list-style-type: none"> <li>A 360° approach to thinking about the game will become the norm – interventions will only be implemented if they've been appropriately tested</li> </ul>	<ul style="list-style-type: none"> <li>Organisational capability and delivery to be assessed annually through stakeholder and colleague feedback</li> <li>Operating costs to be monitored relative to revenue</li> </ul>