

RUGBY WORLD CUP > 2011
ACTIVATION ANALYSIS > STATISTICS, STRATEGIES, TACTICS & TRENDS



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Introduction: Challenges & Solutions > RWC sponsors faced many challenges in 2011 including recession, earthquakes, early kick-offs, pricy travel and a small host nation. But tournament equity benefited from NZ's rugby passion, talented team and inspirational stories.

Quotes & Statistics Snapshot > Mobile outperforms traditional online, social media stats soar, NZ 2011 down on most France 2007 metrics (including terrestrial TV viewing, attendance, percentage of tickets sold and overseas visitors).

Get Up & Go To Work > With early morning kick offs, European sponsors used apps, utilities and giveaways to get consumers out of bed, while broadcasters offered seamless, multi-platform live coverage for home, mobile and office.

TV Down & Social/Mobile Up > Despite broadcaster innovation and NZ viewing records, traditional TV audiences fell - but sponsors turned to social media and smartphones to drive record breaking rugby mobile and online engagement.

Getting There & Being There > To combat high travel costs, organisers/sponsors experimented with promotions/incentives/competitions to entice overseas visitors, while in NZ late kick offs were leveraged with enhanced hospitality and original ambient initiatives.

Fanpaign: Fans Are The Campaign > Once activation was built on supporter calls-to-action and brand-backed 'good luck' messages, but increasingly the work itself is a consumer-created expression of support and a fan-team connection mechanism.

New Zealand's Rich Rugby Stories > New Zealand may be a small media market, but it has a rich rugby history. Steeped in rugby romance, New Zealand's rugby passion provided creatives with inspirational stories - and advertisers love stories.

Sponsor Error = Ambush Avalanche > The controversy around the axed All Black sponsor Telecom New Zealand's 'Abstain For The Game' campaign shows how rights holder errors provide opportunity for ambush/guerrilla work.

New Fans Vs Rugger Buggers > Traditionally seen as exclusive, traditional rugby audiences: some rugby advertisers turned to younger, diverse demographics (and markets), while others stuck to clichés and sexism.

Learnings
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Introduction: Challenges & Solutions

The International Rugby Board (IRB)'s Rugby World Cup (RWC) is rugby's top prize and preeminent global property, but for advertisers, partners and sponsors New Zealand 2011 presented as many challenges as it did opportunities. From macro issues like the recession and earthquakes, to micro problems such as the awkward timing of matches for big northern hemisphere markets, the cost of travel for overseas fans, the relatively small size of host population and the small capacity of its largely low-fi stadiums.

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Of course, there were some positives for sponsors to leverage too. 2011 was a relatively quiet sports year, thus providing an opportunity for the RWC to stand out. The return of the tournament to New Zealand, a country considered by many as the RWC's spiritual home, was a potential plus. Certainly tournament equity was boosted by a host country fan base for which rugby is the number one sport, a host team ranked number one in the world and boasting the world's number one rugby brand - the All Blacks.

Furthermore, tournament sponsors love a story to base their creative strategies around and this competition came with a ready-made, over-arching narrative: could the sport's biggest brand and top ranked team, led by the planet's two best players and playing on home soil, finally overcome its reputation for choking?

For organisers and marketers there was also the choice between focusing on widening rugby's demographic appeal and boosting its emerging market development, or prioritising the sport's traditional fan base. New Zealand may be a rugby heartland, but long term RWC sponsors realise that a more inclusive, global approach is critical to the future success of tournaments such as the Rugby Sevens at the 2016 Rio Olympics and the 2019 RWC in Japan.

Less Business, More Rugby > Another major challenge was that Rugby New Zealand 2011 (RNZ 2011) had a lot to live up to.

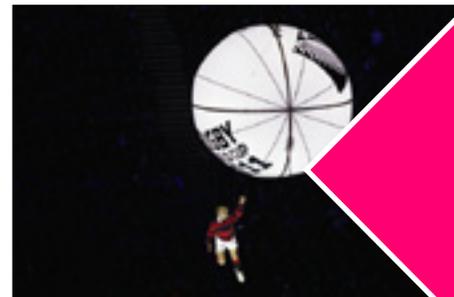
The RWC has enjoyed astronomical growth since its 1987 debut with each tournament breaking the previous host's records. This culminated in France 2007 which drove a 28% rise in the number of registered rugby players, a TV reach of 238 countries and, according to a Deloitte survey, a cumulative audience of 4.3bn.

Continuing this ballooning growth curve was always going to be a challenge for the IRB and RNZ 2011. Particularly considering that New Zealand's population is just 4m compared with France's 66m. France's success left the IRB with a quandary - how could it continue the growth rate and take the tournament to the next level?

The answer was that it didn't even try. For the IRB the 2011 tournament was less about business and more about rugby.

"Taking this year's tournament to New Zealand was not a business decision, it was a rugby decision," said IRB CEO Mike Miller. "We knew we were giving it to a special rugby country, but we knew we would be 30% down on our usual surplus of profits as a result and there has been a bit of belt-tightening."

So for several sponsors the focus was more on stories, romantic rugby stories, than simple statistics. Prioritising deeper engagement through richer content rather than just maximising eyeballs. This seems to have been the sensible strategy, as most

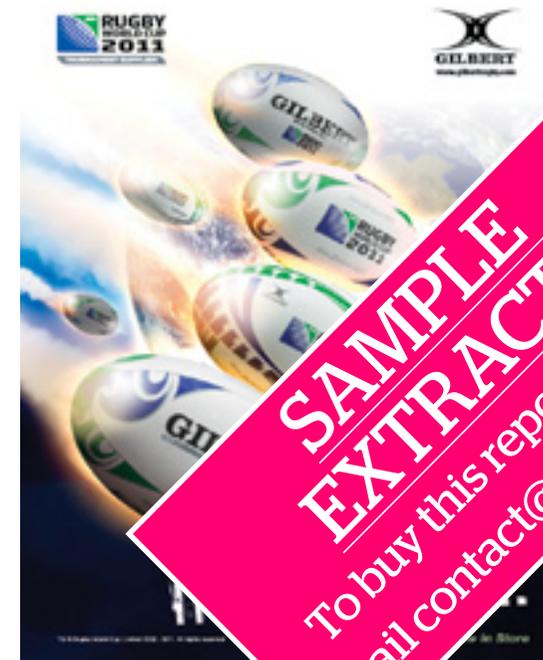


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Quotes & Statistics Snapshot

A quick overview of the data collected thus far shows that mobile has outperformed traditional online, and that social media engagement soared during this world cup. But it also suggests that most NZ 2011 metrics were down on those of France 2007: including lower traditional TV viewing, smaller attendances, a lower percentage of tickets sold and fewer overseas visitors travelling to the host nation.



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“We have shown the world that our great little country can deliver a globally significant event with a host of challenges.”

Brian Roche - RNZ 2011 Chairman

“For the tournament to be contested in the sport’s spiritual home with the host nation ranked as number one in the world and among the strongest sport brands in the world, further enhances brand equity and the appeal of Rugby World Cup.”

Professor Simon Chadwick - Director Centre for the International Business of Sport at Coventry University

“RWC is one of the world’s top 3 major sports events and the largest in the world this year. Alongside the more established rugby nations, fans will be able to see emerging nations such as Russia (playing in their first RWC), and Romania (where participation has risen 222% since 2003) - adding to the appeal of the Tournament and inspiring further growth.”

Mike Miller - CEO IRB

“Taking this year’s tournament to New Zealand was not a business decision, it was a rugby decision. We knew we were giving it to a special country, a country where everybody has got an opinion on rugby. But it is only a country of 4m and we will be 30% down on our usual surplus of profits as a result. We knew that at the time of awarding the RWC to New Zealand in November 2005 and there has been a bit of belt-tightening as a result.”

Mike Miller - CEO IRB

“This Tournament will be like no other: it will attract stronger than ever interest across the world, which will in turn boost commercial interest in and activity around the event.”

David Arthur - Researcher, Economic Impact on Global Rugby CIBS

“The digital offering has been one of the success stories of the RWC. In partnership with RNZ we provided an integrated platform that’s easily accessible for fans around the world, while generating maximum promotion of the event. We are delighted with the record numbers of fans that have become involved in rugby’s showcase event, even though they may not have been able to make it to New Zealand.”

Dominic Rumbles - RWC Head of Communications

“RWC 2011 has generated considerable buzz across the social media network, with Heineken doubling its presence on Twitter and exceeding 10 million views on YouTube by the end of the Tournament. RWC 2015 will continue to increase its social media presence to support the event.”

Handwritten text: Heineken Global Brand Manager



Economic Data

US \$11.7bn

Sport-led NZ economic activity by end of the decade

US \$1.67bn

Amount RWC will drive into the global sports economy

US \$654m

Total economic activity generated by visitors

US \$224.5m

RNZ ticket revenue target (achieved with 2 matches left)

US \$204.1m

Tournament accommodation spend (NZ 2011)

US \$62.8m

Total regional economic boost of final from short-term commerce flow spending by international fans, businesses & sponsors (eg bars, clubs, shops, hotels, bookmakers & marketing)

IRB Revenues

£150m

IRB global game development investment in the 2009-2012 cycle

£80m

Net surplus boost to the game via IRB RWC 2011 revenue from the commercial programme (inc broadcast, sponsorship, travel & hospitality)

95%

Of IRB revenue accounted for by RWC

NZ '11 Vs France '07

85%

Of all tickets sold in New Zealand 2011

94%

Of all tickets sold France 2007

1,477,294

Total attendance at RWC New Zealand 2011

2,246,685

Total attendance at RWC France 2007

60,000

New Zealand 2011 RWC Final attendance (Ed-

80,430

RWC Final 2007 (Stade De France, Paris, France vs South Africa)
NB The record RWC final crowd is 82,000 at the 2003 final featuring Australia v Eng

> Sources
RNZ 2011
MasterCard Economic Impact On
Global Rugby By Centre for the
International Business of Sport (CIBS)
at Coventry University
PWC





Get Up & Go To Work

At this tournament a major hurdle for northern hemisphere advertisers, broadcasters and sponsors was the time difference - as most matches kicked off in the early hours of the morning. So several northern hemisphere team sponsors and rugby advertisers turned to innovative technologies, branded utilities and enticing giveaways - from rugby-themed alarm apps to mobile technologies and even free breakfast pies - to solve the unsociable hours challenge and get consumers in front of live games.

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Connecting live in-game was a challenge that was further exacerbated by the number of weekday matches taking place during the morning commute or in working hours. Recorded matches and highlights shows don't fully solve the problem; after all, consumers have more ad skipping tools and skills than ever.

European broadcasters aimed to meet the challenge by offering seamless, multi-platform live coverage, replays and highlights across TV, online, social networks and mobile in the hope of providing flexible offering for early risers, on-the-move commuters and those at their office desks.

Guinness' Alarm App Wake Up Call > Q: How do you get British and Irish rugby fans up at the crack of dawn to watch live matches (and your adverts) on the other side of the world?

A: The Guinness Alarm Call Mobile App wakes up fans with a direct alarm call from a famous Rugby player to remind them that a game is about to start.

Guinness, a brand deeply engaged in rugby, but not an official sponsor of the Rugby World Cup, is determined not to miss out on New Zealand's party and is running an integrated campaign revolving around its 1759.guinness.com website.

A content-driven platform which, as well as the alarm app, includes links to the brand's 'Get Your Team Round' Facebook tool which allows users to invite their friends over so they can enjoy the match together, as well as video blogs from the tournament (including one from England captain Lewis Moody).

Without any official RWC rights to leverage (or tickets to give away), Guinness instead linked with The Times to run a competition giving away 10,000 subscriptions to The Times Online to fans of the Guinness Great Britain Facebook Page. The Times, of course, is now behind an online pay wall, so the beer brand is offering rich content (including rugby content) through this giveaway.

The integrated campaign is supported by a TV commercial, The Flag, featuring two battling factions/teams (Black and Red) playing a form of "Capture the Flag". The visual creative reflects

rugby features such as line-outs, scrums and tackles, all running under the 'Made Of More' tagline.

AMV BBDO's creative idea here, of course, emulates the life and energy of the famous Guinness 'surge'.

Of course, the brand does have rights with northern hemisphere rugby's 6 Nations competition, so there is also a text-to-win competition running on limited edition 8, 10 and 18-can rugby packs of Guinness 'Draft In a Can'.

To enter, consumers simply needed to text the code found inside their pack, along with the name of the team they are supporting, for the chance to win tickets for them and three friends to every RBS 6 Nations game of their chosen team during the 2012 competition. There were also two runner up prizes of a pair of 2012 RBS 6 Nations tickets.

And what better way to get round not having any rights in the tournament than leveraging a brand's rights from another tournament in the same sport?

Genius!

O2's 'Get Up For England' Breakfast Giveaway

> Official England Rugby Union sponsor O2 launched an integrated campaign, Get Up For England, to promote its backing for the team in the Rugby World Cup.

With the 2011 tournament held in New Zealand, European fans had to set the alarm for the early morning games. To solve this challenge O2's campaign was built around helping supporters get out of bed for the matches. The brand's ads promote its 90,000 specially created England Rugby Breakfast Packs.

The mobile service provider sent out the breakfasts for customers to enjoy from the comfort of their sofa.

The awareness element of the initiative was a Get Up For England With O2 TV spot. The ad featured England team coach Martin Johnson and eight England players - including Jonny Wilkinson, Lewis Moody, James Haskell and Chris Ashton - help a fan get out of bed early for a match.

The 60-second spot shows the stars encourage the supporter by helping him out of bed,



Guinness > Made Of More



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- > Click text below for activation links
- Guinness > 1759 Website
- Guinness > Made Of More TVC
- O2 > Get Up For England TVC
- O2 > Get Up For England Website
- O2 > Get Up For England Priority
- ITV > RWC Website
- IBM > Smarter Data Website
- IBM > Smarter Data ITV Ident 1
- IBM > Smarter Data ITV Ident 2



Sponsor Error = Ambush Opportunity

The biggest pre-tournament marketing story was All Black sponsor Telecom New Zealand's axed 'Abstain For The Game' campaign. When a rights holder's campaign misfires it opens up a world of ambush opportunity. Sponsor error can cause public and political backlash which in turn leads to a guerrilla free-for-all. A feeding frenzy followed the furore over TNZ's aborted initiative. Ambush brands, competitors and consumers were quick to leverage it with clever tactical work and creative piggy-backing on the sponsor's misfortune.



Telecom NZ Axes 'Abstain For The Game' > All Blacks sponsor Telecom New Zealand was forced to pull its 'Abstain For The Game' campaign after an avalanche of public complaints and media criticism.

Part of the official sponsor's 'Backing Black' initiative, the campaign's original objective was to galvanise support behind the home team as it chased rugby glory on home soil. The idea was simple, abstain from sex during the tournament (which lasts almost two months) to show support for the home team.

The campaign, which was cancelled before all the elements were rolled out, was initially fronted by All Black legend Sean Fitzpatrick and was spearheaded by TV spots and online video. There were also press and outdoor executions and a digital hub.

Other rumoured elements of the campaign included plans to give participants black rubber finger rings. During the planning stage, it has been reported that ideas included posters being placed at eye level in men's urinals in bars and restaurants urging men who are urinating to 'Think of your mum in a bikini... abstain for the All Blacks' and placing cold showers outside popular bars to show that publicans were committed to hosing down anyone tempted to break their vow of chastity.

The campaign certainly made its mark - generating headlines around the world. The initiative received criticism from multiple parties. The Young Women's Christian Association suggested handouts of black condoms would be more effective than the 'Abstain' campaign.

Even Prime Minister John Key joined the chorus of criticism saying the campaign was "living proof" that not all advertisement money was wisely spent.

Agency Saatchi & Saatchi says the campaign aimed to be a tongue-in-cheek, fun, and a light-hearted way to get rugby people, and all New Zealanders, talking about the Rugby World Cup and letting them share their support for the All Blacks in an authentic New Zealand way.

"It's not rocket science. It is entertaining, pro-

vocative, and good natured. I think it will appeal to true rugby loving heartland supporters," said Saatchi global chief executive and Telecom NZ board member Kevin Roberts.

Nevertheless, despite Saatchi's defence of its work, the campaign was cancelled and the telecom company's retail head Alan Gourdie sent an apologetic email to staff.

"It's been a torrid 24 hours in the glare of public spotlight, as well as in that of our own team's views and opinions. Nothing like a full and frank exchange of views! But even before the full campaign was properly kicked off, it's pretty obvious to all that we misjudged public opinion. So you may or may not be surprised to hear that following the strong reaction yesterday, we won't be proceeding with the 'Abstain' campaign. I would like to give a personal apology for any embarrassment the campaign has caused," said Gourdie.

Moa's Anti-Abstinence Ambush > While advertising legislation around the world is steadily reducing the number of 'beer gets you sex' ad messages from alcohol brands, this piece of Rugby World Cup guerrilla work from beer brand Moa takes the opposite approach with a 'sex gets you beer' message.

To make the most of the controversy and media frenzy around official All Blacks sponsor Telecom New Zealand's disastrous 'Abstain For the game' campaign, Moa's ambush work encouraged consumers to have as much sex as possible during the Rugby World Cup.

They even offered consumers a reward for their sexual activities.

Customers were encouraged to visit Moa Beer's Facebook page before the tournament kicked off on 9 September. There they were invited to post the number of points they thought Dan Carter would score during the RWC and then match each of his points with a sexual encounter during the period.

Those who guess the right points total and the match it with the right number of sexual encounters will receive a case of Moa 1.5L magnums.

Moa supported the campaign with Moa



Telecom NZ > Abstain For The Game



"Telecom NZ's 'Abstain For The Game' certainly made its mark. The initiative received criticism from multiple parties - ranging from the Prime Minister to the Young Women's Christian Association. The sponsor and its agency admitted to misjudging public opinion, pulled the campaign and apologised for any embarrassment caused.

> Learnings: Challenges & Solutions

From innovation and original thinking, to new technologies and future facing media platforms, both organisers and sponsors, and advertisers and ambushers alike used creative thinking and tech-led tactics to try and solve the specific activation challenges faced by New Zealand's 2011 Rugby World Cup. With the competition returning to a major media market for England 2015, the learnings from this competition may turn out to be most relevant to future rugby tournaments in less established markets such as Rio 2016 and Japan 2019.



Purchase > The full interactive pdf 'Rugby World Cup 2011 Activation Analysis' report retails at £250 (excluding VAT).

The report is approximately 45 pages and includes analysis, opinion, trends, tactics, strategies, quotes and statistics - as well as comprehensive links to the creative executions and relevant websites, films and social media platforms.

The report is delivered as a single-use file; discount rates for multiple users are available.

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About Us > The activation of sponsorship rights is now more creatively and strategically complex than ever - but the potential rewards are far greater too. The challenge for sponsorship marketers is to keep up with the most relevant ways of maximising value and to keep ahead of the competition.

Activative provides intelligence and insights services that help our clients - rights owners, brands, agencies and professional services - stay at the forefront of this evolving landscape. We focus on emerging strategies and tactics, original and innovative ideas, future facing media and new technologies across the sponsorship community - from sports, music, arts and culture, to education, ecology, cause and corporate social responsibility.

Our role is to advise, analyse, explore, filter and stimulate marketers across the entire space - from traditional sponsorships, to brand tie-ins, strategic collaborations and commercial partnerships. Activative provides clients and subscribers with trends insights, activation stimulus, creative idea generation, competitor/sector analysis and strategic planning. Through our interactive trends, reports and showcases, online monitoring source and our research and consultancy we guide sponsorship professionals through this changing space.

The old sponsorship model, based on one directional brand-biased claims, vanilla hospitality, badging brands with logos, eye-ball metrics, cost per thousand, reach and frequency, is being replaced by one based on authenticity, customisation, dialogue, interactivity and permissive engagement. Sponsorship is flourishing in this new communications environment as brands seek symbiotic passionate platforms around which to build consumer conversations.

So Activative looks beyond the sponsorship stalwarts of logo rights, arena billboards, shirt sponsorship, celebrity spokespeople, on-pack ticket promotions and traditional above-the-line advertising, and focuses on original ideas and fresh initiatives that leverage new technologies and trends, including: ambush and guerrilla work, branded content and entertainment, blogs and social media, consumer creation and generation, experiential and interactive, gaming and video, utilities, word of mouth and relationship marketing.

We seek out the unconventional, champion daring ideas and analyse breakthrough thinking. The team is committed to innovative thinking. We are not a mouthpiece for the profession, the rights holders or the sponsors themselves. The real value in our work lies in linking trends and making connections, exploring new ideas and identifying original approaches. We offer independent research and objective analysis and use this to make directional insights and actionable recommendations. <

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