

# FIFA Women's World Cup 2023 National Economic Impact Evaluation

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**FRESH INFO**



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# Glossary

| Term                               | Definition   |
|------------------------------------|--|
| AFC                                | Asian Football Confederation.  |
| Avoided future costs               | Costs that do not need to be borne in the future because they have already been incurred to host the event.  |
| Benefit-cost ratio (BCR)           | The gross benefit divided by the gross cost.   |
| CAF                                | Confederation of African Football.   |
| Carbon emissions                   | The volume of greenhouse gas emissions produced by the event, measured in terms of carbon dioxide equivalent (CO <sub>2</sub> e).  |
| CONCACAF                           | Confederation of North, Central America and Caribbean Association Football.  |
| CONMEBOL                           | Confederación Sudamericana de Fútbol (South American Football Confederation).  |
| Cost-benefit analysis (CBA)        | Cost-benefit analysis is a well-established evaluation framework that governments and businesses use to make and/or evaluate investment decisions. Any type of cost or benefit can be included in a CBA if it can be given a credible value.                                   |
| CO <sub>2</sub> e                  | Carbon dioxide equivalent – a measure used by scientists to convert different greenhouse gas emissions into a single unit with the same global warming properties as carbon dioxide.   |
| Consumer surplus                   | The difference between the price consumers pay and the price they are willing to pay.  |
| Counterfactual                     | The alternative scenario against which the results are compared.   |
| Day visitor                        | A visitor who does not stay overnight in a destination.  |
| Equivalent Advertising Value (EAV) | An approach to valuing media exposure that involves estimating the cost of buying the same amount of coverage at retail prices using industry ‘rate cards’. Multipliers may also be applied in cases where ‘earned’ media is believed to be worth more than ‘purchased’ media. |
| Event attendee                     | Anyone in the following groups who attended FIFA WWC in-person: spectators, volunteers, and FIFA staff and contractors, teams, broadcast/media staff and contractors.  |
| FIFA Fan Festival (FFF)            | Official fan zones providing entertainment and activities in Auckland, Hamilton, Wellington, and Dunedin.  |
| FIFA Zurich                        | FIFA, headquartered in Zurich, Switzerland.  |
| Financial cost or benefit          | A cost or benefit represented by an actual or expected financial transaction.  |
| FIFA WWC                           | FIFA Women’s World Cup 2023, co-hosted by New Zealand and Australia between 20 July and 20 August 2023.  |
| FIFA WWC Draw                      | The final draw for the FIFA WWC hosted in Auckland on 22 October 2022.   |
| FIFA WWC Play-Off Tournament (POT) | The final stage of the qualification process for the FIFA WWC in which 10 teams competed for the final three places in the FIFA WWC. The FIFA WWC Play-Off Tournament was hosted in Hamilton and Auckland between 17–23 February 2023.   |



|  |  |
|--|--|
| <b>Global Warming Potential (GWP)</b>    | The heat absorbed by any greenhouse gas in the atmosphere, as a multiple of the heat that would be absorbed by the same mass of carbon dioxide (CO <sub>2</sub> ). GWP is 1 for CO <sub>2</sub> . For other gases, it depends on the gas and the time frame. |
| <b>Gross monetised benefit</b>           | The aggregate value of the benefits that have been monetised in the CBA.   |
| <b>Gross monetised cost</b>              | The aggregate value of the costs that have been monetised in the CBA.  |
| <b>Host Cities</b>                       | In New Zealand: Auckland, Hamilton, Wellington, and Dunedin.   |
| <b>Spectator</b>                         | A person not involved in the delivery of the event who attended a FIFA WWC match and/or visited a FIFA Fan Festival site in New Zealand.   |
| <b>International visitor</b>             | A person whose usual residence is outside New Zealand.   |
| <b>LFS Australia</b>                     | Local FIFA Subsidiary Australia – a temporary organisation established to deliver the FIFA WWC in Australia.   |
| <b>LFS New Zealand</b>                   | Local FIFA Subsidiary New Zealand – a temporary organisation established to deliver the FIFA WWC in New Zealand.   |
| <b>MBIE</b>                              | Ministry of Business, Innovation and Employment.   |
| <b>MBIE’s event evaluation framework</b> | The method used by MBIE to evaluate the costs and benefits of events it funds.   |
| <b>Media exposure benefits</b>           | The projected net benefit to New Zealand of future tourism income that can be directly attributed to media exposure caused by the FIFA WWC.  |
| <b>Net benefit</b>                       | Total benefit less total cost.   |
| <b>Net Promoter Score (NPS)</b>          | A Net Promoter Score is a widely used customer loyalty and satisfaction measurement that lies between -100 and 100. A score of 100 indicates that 100% of people are likely to recommend the good, service, or experience to others.                         |
| <b>New Zealand resident</b>              | A person who usually lives in New Zealand.   |
| <b>Non-financial cost or benefit</b>     | A cost or benefit that is unpriced or of a social, cultural, or environmental nature.  |
| <b>OFC</b>                               | Oceania Football Confederation.  |
| <b>Overnight visitor</b>                 | A visitor who stays overnight in a destination.  |
| <b>Producer surplus</b>                  | The difference between what price producers are willing and able to supply a good for and what price they actually receive from consumers.   |
| <b>Social Cost of Carbon (SCC)</b>       | The SCC is an estimate, in dollars, of the economic damages that would result from emitting one additional tonne of carbon dioxide into the atmosphere.  |
| <b>Total benefit</b>                     | Total gross benefit generated by the FIFA WWC.   |
| <b>Total cost</b>                        | Total gross cost generated by the FIFA WWC.  |
| <b>UEFA</b>                              | Union of European Football Associations  |
| <b>Unique attendee</b>                   | A person who attended the FIFA WWC in-person (counted only once).  |
| <b>Visitor night</b>                     | One visitor staying one night in a destination in any form of private or commercial accommodation.   |



# 1 Executive summary

**FIFA had not yet released its carbon audit or global broadcast estimates at the time of writing so the results in this report are best estimates based on available information and may be subject to change.**

This evaluation has identified a net benefit to New Zealand of co-hosting the FIFA Women’s World Cup Australia and New Zealand 2023™ (FIFA WWC) of **\$109.5 million** and a benefit-cost ratio (BCR) of **1.34**. These are strong results relative to: (a) the projections developed in 2019; (b) national benchmarks for other sports events in New Zealand involving more than 10,000 attendees; and (c) the investment of \$101.1 million in the FIFA WWC by central and local government agencies. Spectator satisfaction was also high and comfortably outperformed national benchmarks.

In addition to strong economic results, this evaluation finds that hosting the FIFA WWC delivered a wide range of intangible benefits for football, women and communities in New Zealand including achievement of the government’s key objective of “increasing the visibility of, and value placed on, women in sport and wider society”. Research shows the benefits extended beyond these groups to a large and diverse segment of New Zealanders.

**Table 1: Summary of evaluation results, projections, and national benchmarks**

Source: FIFA WWC Impact Evaluation, Event Economics

| Measure                      | Result for FIFA WWC (2023) | Projections for FIFA WWC (2019) | National benchmark for large sports events <sup>1</sup> |
|------------------------------|----------------------------|---------------------------------|---|
| Net benefit (\$m)            | \$109.5                    | \$46.3                          | \$1.1   |
| Benefit-cost ratio           | 1.34                       | 1.29                            | 1.28  |
| International visitors       | 26,915                     | 22,706                          | 105   |
| International visitor nights | 312,008                    | 335,090                         | 942   |
| Spectator satisfaction       | 97%                        | n/a                             | 92%   |
| Spectator Net Promoter Score | 75                         | n/a                             | 58  |

Other key results for New Zealand include:

- 29 FIFA WWC matches hosted in New Zealand out of 64 including 24 group matches, 2 round of 16 matches, 2 quarter-finals and 1 semi-final.
- A total of 744,236 tickets were issued across the 29 matches played in New Zealand at an average of 25,663 per match.
- 258,527 unique attendees (counting each person only once) comprising 226,270 New Zealand residents and 32,257 international visitors.
- 1,582 official volunteers, 1,543 of whom lived in New Zealand.
- 26,915 international visitors attracted to New Zealand by the FIFA WWC (not all of the 32,257 international FIFA WWC attendees cited above were attracted to New Zealand by the event).
- 312,008 international visitor nights in New Zealand attributable to the FIFA WWC, with an average stay of 11.6 nights.

<sup>1</sup> Involving more than 10,000 attendees and evaluated using the Event Economics methodology. Many of these benchmark events were impacted by COVID-19, particularly in terms of international attendance.



- \$182.5 million of additional expenditure in New Zealand across FIFA WWC event operations and tourism.
- A provisional estimate<sup>2</sup> of \$22.5 million worth of media exposure for New Zealand (the estimated future value of tourism generated).
- 87% of spectators felt the FIFA WWC improved their understanding and appreciation of women's sport.
- Nearly 60% of New Zealand residents watched a game during the tournament.
- 50% of New Zealanders said they had recently advocated for or encouraged others to watch women's sport, up from 38% in 2022.
- 97% of FIFA WWC spectators were satisfied or very satisfied with their overall FIFA WWC experience.

## Introduction

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Australia and New Zealand were awarded co-hosting rights to the FIFA WWC on 26 June 2020 following a formal bidding process that began in 2019. In addition to being the first 32-team Women's World Cup, FIFA WWC was the first Women's World Cup to be hosted in multiple countries, and only the second World Cup tournament to do so following the FIFA Men's World Cup 2002 held in Japan and South Korea. It was also the first FIFA Women's World Cup to be held in the southern hemisphere, the first senior FIFA tournament to be held in Oceania, and the first FIFA tournament to be hosted across multiple confederations (with Australia in the Asian Football Confederation (AFC) and New Zealand in the Oceania Football Confederation (OFC)). New Zealand's co-hosting of the FIFA WWC involved three distinct events:

1. **FIFA WWC Draw** in Auckland on 22 October 2022.
2. **FIFA WWC Play-Off Tournament (inter-confederation play-offs)**, hosted in Hamilton and Auckland between 17 February and 23 February 2023.<sup>3</sup>
3. **FIFA WWC Tournament**, co-hosted in New Zealand and Australia between 20 July and 20 August 2023, with 32 teams playing 64 games over 32 days in nine Host Cities.

New Zealand hosted 16 teams for the group stage of the tournament (including the Football Ferns) and 29 matches across the Host Cities of Auckland, Hamilton, Wellington, and Dunedin.

This evaluation focuses on the costs and benefits of co-hosting the FIFA WWC in New Zealand relative to the counterfactual of the event being hosted in another country. Economic, social, cultural, and environmental impacts are considered in the evaluation to capture the wide range of impacts caused by the event. The evaluation includes relevant costs and benefits in the lead up to the event, including the Draw and Play-Off Tournament, as well as the FIFA WWC Tournament.

The Ministry of Business, Innovation, and Employment's (MBIE's) event evaluation framework has been used as the foundation for this evaluation. The framework is based on cost-benefit analysis (CBA) which is a well-established evaluation method used by government agencies and businesses.

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<sup>2</sup> Awaiting final audience estimates from FIFA.

<sup>3</sup> The official Play-Off Tournament matches were held between 18 February and 23 February. Two friendly matches were played on 17 February – New Zealand vs. Portugal and Argentina vs. Chile.



## Government investment

Planning and delivering the New Zealand component of the FIFA WWC required a considerable investment of time and money from a wide range of central and local government agencies. This investment began soon after New Zealand was awarded co-hosting rights in 2020 and extended beyond the conclusion of the FIFA WWC in August 2023. In aggregate, these agencies invested \$101.1 million in FIFA WWC-related initiatives (as shown in Table 2) with central government agencies contributing \$64.9 million (64.2%) and local government agencies the remaining \$36.1 million (35.8%).

**Table 2: Government investment in the FIFA WWC (\$m)**

Source: Relevant central and local government agencies

|                                    | Central government (\$m) | Local government (\$m) | TOTAL (\$m)    | Share         |
|------------------------------------|--------------------------|------------------------|----------------|---------------|
| Core delivery expense <sup>4</sup> | \$42.1                   | \$32.1                 | \$74.3         | 73.5%         |
| Leverage and legacy                | \$22.8                   | \$4.0                  | \$26.8         | 26.5%         |
| <b>TOTAL</b>                       | <b>\$64.9</b>            | <b>\$36.1</b>          | <b>\$101.1</b> | <b>100.0%</b> |
| Share                              | 64.2%                    | 35.8%                  | 100.0%         |               |

## Ticketing

A total of 2.04 million match tickets were issued across the tournament. The 29 matches hosted in New Zealand accounted for 37% of tickets issued (744,236) and the 35 matches hosted in Australia accounted for the remaining 63% (1,291,861). The number of tickets issued per capita was 0.15 for New Zealand matches compared with 0.05 for Australian matches.

**Table 3: Summary of FIFA WWC ticketing**

Source: FIFA

| Country     | Matches | Tickets issued | Share of tickets issued | Tickets issued per capita |
|-------------|---------|----------------|-------------------------|---------------------------|
| New Zealand | 29      | 744,236        | 37%                     | 0.15                      |
| Australia   | 35      | 1,291,861      | 63%                     | 0.05                      |
| Tournament  | 64      | 2,036,097      | 100%                    | 0.07                      |

## Event attendance

A total of 258,527 people attended the FIFA WWC in New Zealand in person. This figure counts each attendee only once, even if they interacted with the event multiple times, and includes those involved in the event (FIFA staff and contractors, teams, broadcast/media staff and contractors, volunteers) and spectators (people not involved in the delivery of the event who attended a FIFA WWC match and/or visited a FIFA Fan Festival site in New Zealand).

<sup>4</sup> Core delivery expenses are expenses required to meet FIFA requirements and/or deliver the essential (non-discretionary) components of the event. This may differ from how some government agencies categorised their expenditure.



Over 98% (254,753) of the 258,527 FIFA WWC attendees were spectators, with volunteers being the next largest group at 1,582. Of the 258,527 overall attendees, 87.5% were from New Zealand and the remaining 12.5% were from overseas (international visitors).

**Table 4: Count and composition of unique FIFA WWC attendees (counting each person only once)**

Source: Surveys of spectators and volunteers, FIFA WWC stakeholder surveys and interviews

|                     | New Zealand residents | International visitors | TOTAL          | Share         |
|---------------------|-----------------------|------------------------|----------------|---------------|
| FIFA                | 260                   | 328                    | 588            | 0.2%          |
| Teams               | 45                    | 816                    | 861            | 0.3%          |
| Broadcast and media | 136                   | 607                    | 743            | 0.3%          |
| Volunteers          | 1,543                 | 39                     | 1,582          | 0.6%          |
| Spectators          | 224,286               | 30,467                 | 254,753        | 98.5%         |
| <b>TOTAL</b>        | <b>226,270</b>        | <b>32,257</b>          | <b>258,527</b> | <b>100.0%</b> |
| Share               | 87.5%                 | 12.5%                  | 100.0%         |               |

## Impact on New Zealand

A total of 225,829 New Zealand residents experienced the FIFA WWC in person as spectators or volunteers. This figure counts each attendee only once, even if they interacted with the event multiple times. In aggregate, spectators and volunteers committed 3.32 million hours of time to the FIFA WWC, valued at \$34.3 million using value-of-time estimates provided by Waka Kotahi NZ Transport Agency. New Zealand residents also spent around \$29.3 million on event-related goods and services, excluding FIFA WWC tickets and merchandise, which are considered elsewhere.

The total value of the time and money invested in the FIFA WWC by New Zealand resident spectators and volunteers was therefore \$63.6 million. This is the cost that New Zealand resident spectators and volunteers incurred to access the benefits of attending the FIFA WWC, in addition to FIFA WWC tickets and merchandise which are considered elsewhere.

**Table 5: Engagement by New Zealand resident spectators and volunteers**

Source: Surveys of spectators and volunteers

|  | Spectators | Volunteers | TOTAL     |
|--|------------|------------|-----------|
| New Zealand residents                                    | 224,286    | 1,543      | 225,829   |
| Average time commitment per NZ resident (hours)          | 14.3       | 70.6       | 14.7      |
| Total time commitment by NZ residents (hours)            | 3,207,290  | 108,951    | 3,316,241 |
| Value of time and money commitment by NZ residents (\$m) | \$62.3     | \$1.3      | \$63.6    |
| Value-of-time commitment by NZ residents (\$m)           | \$33.2     | \$1.1      | \$34.3    |
| Value of expenditure by NZ residents (\$m)               | \$29.1     | \$0.2      | \$29.3    |





The FIFA WWC attracted 26,915 international visitors to New Zealand across the various attendee groups. This figure excludes international visitors who attended the FIFA WWC but were not attracted to New Zealand by the event. The exclusion of these attendees means that the international visitor numbers attributable to the FIFA WWC are lower than the gross attendee estimates presented in Table 4. The international visitation attributable to the FIFA WWC generated 312,008 visitor nights in New Zealand at an average of 11.6 nights per visitor.

**Table 6: Visitation to New Zealand attributable to the FIFA WWC**

Source: Surveys of spectators and volunteers, FIFA WWC stakeholder surveys and interviews

|                     | International visitors to New Zealand | Visitor nights in New Zealand | Average nights in New Zealand per visitor |
|---------------------|---------------------------------------|-------------------------------|---|
| FIFA                | 328                                   | 10,703                        | 32.6                                      |
| Teams               | 816                                   | 26,194                        | 32.1                                      |
| Broadcast and media | 607                                   | 9,409                         | 15.5                                      |
| Volunteers          | 26                                    | 745                           | 28.7                                      |
| Spectators          | 25,138                                | 264,958                       | 10.5                                      |
| <b>TOTAL</b>        | <b>26,915</b>                         | <b>312,008</b>                | <b>11.6</b>                               |

The FIFA WWC created an additional \$182.5 million of expenditure in New Zealand through three main channels:

- \$102.1 million through domestic event operations. This was driven by new money introduced into the economy to deliver the event (funds sourced from outside New Zealand).
- \$73.2 million through purchases of tourism goods and services by international event attendees.
- \$7.2 million through purchases of non-tourism goods and services by international organisations e.g., FIFA partners, sponsors, and teams.

**Table 7: Additional expenditure in New Zealand attributable to the FIFA WWC (\$m)**

Source: Surveys of spectators and volunteers, FIFA WWC stakeholder surveys and interviews

|   | Additional expenditure in New Zealand (\$m) |
|---|---|
| Event operations                            | \$102.1                                     |
| Purchases of tourism goods and services     | \$73.2                                      |
| Purchases of non-tourism goods and services | \$7.2                                       |
| <b>TOTAL</b>                                | <b>\$182.5</b>                              |

Other monetised impacts on New Zealand include:

- \$3 million of unpriced **carbon emissions** attributable to the FIFA WWC. These were mainly driven by international and domestic transport.
- \$22.5 million of **media exposure benefits** attributable to the coverage generated by the FIFA WWC.
- \$78.6 million of **non-attendee benefits** accruing to New Zealand residents. This is the amount New Zealand residents who did not attend the FIFA WWC would be willing to pay to host another FIFA WWC in New Zealand (around \$16 per non-attendee on average).



- \$18.5 million of **avoided future costs** due to planned capital projects being brought forward for the FIFA WWC.
- \$3.8 million of **other benefits**.

The cost-benefit analysis for New Zealand has identified a gross monetised cost of **\$323.2 million** and a gross monetised benefit of **\$432.6 million**. The net monetised benefit is therefore **\$109.5 million** and the benefit-cost ratio (gross benefit divided by gross cost) is **1.34**. This means that every \$1 of cost incurred by New Zealand returned a benefit of \$1.34 (a net benefit of \$0.34 per dollar).

**FIFA had not yet released its carbon audit or global broadcast estimates at the time of writing so the results for ‘carbon costs’ and ‘media benefits’ are best estimates based on available information and may be subject to change.**

**Table 8: Estimated costs and benefits to New Zealand of co-hosting the FIFA WWC**

Source: All sources listed in Table 13 in Section 2.3

| Measure                        | Value (\$m)    | Description   |
|--------------------------------|----------------|---|
| Government costs               | \$101.1        | Total cost to central and local government  |
| Public funds cost              | \$20.2         | Redistribution of public funds cost @ 20% as per Treasury guidelines                                  |
| Event attendee costs           | \$80.3         | Value of time and money devoted to the FIFA WWC by attendees  |
| Business costs                 | \$118.6        | Value of the resources consumed by businesses to service the additional demand caused by the FIFA WWC |
| Carbon costs <sup>5</sup>      | \$3.0          | Value of unpriced carbon production attributable to the FIFA WWC                                      |
| Other costs                    | \$0.0          | Other monetised costs   |
| <b>Total cost</b>              | <b>\$323.2</b> | <b>Total gross cost generated by the FIFA WWC</b>   |
| Event attendee benefits        | \$117.8        | Social value to FIFA WWC attendees (event attendee cost + estimated consumer surplus)                 |
| Business benefits <sup>6</sup> | \$191.6        | Value of additional business revenue caused by the FIFA WWC   |
| Media benefits <sup>7</sup>    | \$22.5         | Value of media exposure generated by the FIFA WWC (estimated future value of tourism generated)       |
| Non-attendee benefits          | \$78.6         | Social value accruing to non-attendees (option value/existence value/national pride)                  |
| Avoided future costs           | \$18.5         | Avoided future infrastructure costs due to projects being brought forward for the FIFA WWC            |
| Other benefits                 | \$3.8          | Other monetised benefits  |
| <b>Total benefit</b>           | <b>\$432.6</b> | <b>Total gross benefit generated by the FIFA WWC</b>  |
| <b>Net benefit</b>             | <b>\$109.5</b> | <b>Total benefit less total cost</b>  |
| <b>Benefit-cost ratio</b>      | <b>1.34</b>    | <b>Total benefit divided by total cost</b>  |

<sup>5</sup> Best estimate at time of writing – may be subject to change.

<sup>6</sup> Includes 10% of event income sourced from, and spent in, New Zealand, as per MBIE’s event evaluation guidelines.

<sup>7</sup> Best estimate at time of writing – may be subject to change.



## Comparison with forecast

MBIE's event evaluation framework was used during the due diligence phase to assess the potential benefits of co-hosting the FIFA WWC. Valid comparisons can therefore be made between the most recent projected impacts on New Zealand (produced in 2019) and the realised impacts presented in this report, noting that neither the Draw nor the Play-Off Tournament had been assigned to New Zealand at the time the projections were produced.

Realised gross costs were \$99.1 million (44%) higher than projected and realised benefits were \$164.4 million (61%) higher. The realised net benefit was \$65.3 million (148%) higher than projected and the realised benefit-cost ratio was 14 basis points (12%) higher than projected. Reasons for these variances include:

- the inclusion of the Draw, Play-Off Tournament, and Opening Ceremony costs and benefits in this evaluation (these were not included in the 2019 projections because they hadn't been assigned to New Zealand at that stage);
- the inclusion of non-attendee benefits in this evaluation (non-attendee benefits were not considered in the 2019 projections);
- the teams that were drawn to play in New Zealand as this was not finalised until February 2023 following the Play-Off Tournament. New Zealand was fortunate to host the United States team which was accompanied by the large group of supporters;
- changes in central and local investment levels during the planning phase as the requirements and opportunities of co-hosting the FIFA WWC became more certain.

**Table 9: Comparison of realised and projected impacts**

Source: FIFA WWC Impact Evaluation (2023), FIFA WWC Pre-Event Evaluation (2019)

| Measure                      | Realised (2023) | Projected (2019) <sup>8</sup> | Variance | Percentage variance |
|------------------------------|-----------------|-------------------------------|----------|---------------------|
| Gross cost (\$m)             | \$323.2         | \$224.1                       | \$99.1   | 44%                 |
| Gross benefit (\$m)          | \$432.6         | \$268.3                       | \$164.4  | 61%                 |
| Net benefit (\$m)            | \$109.5         | \$44.2                        | \$65.3   | 148%                |
| Benefit-cost ratio           | 1.34            | 1.20                          | 0.14     | 12%                 |
| International visitors       | 26,915          | 22,706                        | 4,209    | 19%                 |
| International visitor nights | 312,008         | 335,090                       | -23,082  | -7%                 |

<sup>8</sup> Taken from the final business case which was published in 2019. The monetary figures have been left in 2019-dollar terms to provide direct alignment with the figures presented in the business case. The realised figures are presented in 2023-dollar terms.



## Non-monetised costs and benefits to New Zealand

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The major non-monetised costs and benefits for New Zealand of hosting the FIFA WWC included:

- **Increased value, visibility, and perception of women's sport in New Zealand.** The long-term legacy of these visibility and perception impacts will depend on the extent to which they are leveraged and built upon in future years. The tournament also left a lasting impact and impression on a generation of young people and players who had an unprecedented opportunity to see the best players in the world, potentially inspiring future Football Ferns as well as players of other sporting codes.
- **Improved infrastructure.** Significant investments were made in stadia, training grounds, and football club infrastructure across New Zealand to comply with FIFA's requirements. Many of these changes will be long-lived, resulting in better facilities for a variety of sporting codes and communities and more appropriate environments for women that will reduce future barriers to participation in sport.
- **Potential growth in football participation.** Survey results indicate that around 17% of New Zealanders were inspired by the FIFA WWC to increase their participation in football, although actual changes are likely to be lower than intended changes. Early evidence of these changes will not be available until mid-2024 when registrations for the 2024 club season are complete.
- **Celebrating New Zealand and its unique culture on the world stage.** Co-hosting the FIFA WWC gave New Zealand an opportunity to showcase its culture, stories, and brand to a large global audience. The extensive leverage and legacy programme extended New Zealand's reach well beyond the football pitch to showcase our unique culture and tell the New Zealand story; promote New Zealand as a tourism destination; celebrate our leadership in gender equality and women's sport; and use sport diplomacy to improve our international and trade relationships.
- **Educational and training outcomes.** More than 100,000 students and young people around the country had the opportunity to participate in leverage and legacy and community engagement initiatives that were delivered for the FIFA WWC. The aim was to deliver programmes that would have a transformative impact on the lives of young people with a particular focus on young women and girls.
- **Other community engagement outcomes.** The government's leverage and legacy programme had important community engagement objectives including connecting people with the FIFA WWC, ensuring teams and their communities felt safe and welcome, and bringing people together to build community, enhance wellbeing, and protect the environment.
- **Enhanced event delivery capability.** The knowledge and experience gained from hosting the FIFA WWC will enhance New Zealand's major event capacity and capability, and the success of the event will enhance New Zealand's reputation as a safe and capable host for large global events.
- **Enhanced research capability.** Several innovations were developed within the post-event evaluation process for the FIFA WWC that could be applied to future major events including development of a shared research platform for the five central and local government stakeholders (MBIE, Auckland Council, Hamilton City Council, WellingtonNZ, and Dunedin City Council); development of a shared funding model across the five government stakeholders that resulted in savings for all funders; and the development of new survey techniques which are in the public domain and could be applied to future events involving multiple Host Cities.



## Monetised costs and benefits to Host Cities

Independent impact evaluations were commissioned and paid for by each Host City (Auckland, Hamilton, Wellington, and Dunedin). These Host City evaluations leveraged the research platforms funded by MBIE and used the same methodology and research provider as the national evaluation. The high-level results for each Host City are presented in Table 10, and the executive summaries from each Host City evaluation have been reproduced in Section 6.4. Note that the Host City evaluations don't sum to the national evaluation for two reasons:

1. some of the national costs and benefits accrued to areas outside the Host Cities;
2. financial transfers between regions (e.g., spend by domestic visitors) are included in the Host City evaluations but treated as zero sum in the national evaluation.

**Table 10: Summary of impacts on Host Cities**

Source: Independent evaluations commissioned by Host Cities

| Measure                     | Auckland | Hamilton | Wellington | Dunedin |
|-----------------------------|----------|----------|------------|---------|
| Gross cost (\$m)            | \$154.8  | \$19.6   | \$59.0     | \$27.3  |
| Gross benefit (\$m)         | \$203.6  | \$26.0   | \$83.6     | \$34.1  |
| Net benefit (\$m)           | \$48.9   | \$6.4    | \$24.6     | \$6.8   |
| Benefit-cost ratio          | 1.32     | 1.33     | 1.42       | 1.25    |
| Visitor nights <sup>9</sup> | 175,279  | 15,034   | 100,124    | 39,793  |

<sup>9</sup> Includes domestic and international visitor nights. The national evaluation only includes international visitor nights.



## 2 Introduction

### 2.1 Background

Australia and New Zealand were awarded co-hosting rights to the FIFA WWC on 26 June 2020 following a formal bidding process that began on 19 February 2019. The decision came after a vote by the FIFA Council, with the Australia and New Zealand (“AsOne”) bid earning 22 votes out of 35. Neither country had previously hosted a Tier One FIFA tournament.

In July 2019, midway through the bidding process, FIFA proposed an expansion of the Women's World Cup from 24 to 32 teams, starting with the 2023 edition. The proposal came following the success of the FIFA Women's World Cup 2019 in France and the prior edition of the tournament in 2015 in Canada, which after increasing from 16 to 24 teams set an attendance record for all FIFA competitions besides the men's FIFA World Cup. The expansion proposal was unanimously adopted by the FIFA Council on 31 July 2019.

In addition to being the first 32-team Women's World Cup, the FIFA WWC was the first Women's World Cup to be hosted in multiple countries, and only the second World Cup tournament to do so following the FIFA Men's World Cup 2002 held in Japan and South Korea. It was also the first FIFA WWC to be held in the southern hemisphere, the first Tier One FIFA tournament to be held in Oceania, and the first FIFA tournament to be hosted across multiple confederations (with Australia in the AFC and New Zealand in the OFC). In addition, FIFA introduced the first-ever Play-Off Tournament.

New Zealand's co-hosting of the FIFA WWC involved three distinct events:

1. **FIFA WWC Draw** in Auckland on 22 October 2022.
2. **FIFA WWC Play-Off Tournament (inter-confederation play-offs)**, hosted in Hamilton and Auckland between 17 February and 23 February 2023.<sup>10</sup>
3. **FIFA WWC Tournament**, co-hosted in New Zealand and Australia between 20 July and 20 August 2023, with 32 teams playing 64 games over 32 days in nine Host Cities.

New Zealand hosted 16 teams for the group stage of the tournament (including the Football Ferns) and 29 matches across the Host Cities of Auckland, Hamilton, Wellington, and Dunedin. The opening match between New Zealand and Norway, and the opening ceremony of the tournament, were hosted at Eden Park in Auckland on 20 July 2023. The final was played on 20 August 2023 at Stadium Australia in Sydney.

- Group stage: 20 July – 3 August
- Round of 16: 5 – 8 August
- Quarter-finals: 11 – 12 August
- Semi-finals: 15 – 16 August
- Third-place play-off: 19 August
- Final: 20 August

More information about the FIFA WWC is provided in Section 3.

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<sup>10</sup> The official Play-Off Tournament matches were held between 18 February and 23 February. Two friendly matches were played on 17 February – New Zealand vs. Portugal and Argentina vs. Chile.



## 2.2 Project scope

Fresh Information Limited (Fresh Info) was commissioned by MBIE to evaluate the costs and benefits to New Zealand of hosting the FIFA WWC. This evaluation focuses on the costs and benefits of hosting the FIFA WWC in New Zealand relative to the counterfactual<sup>11</sup> of the event being hosted in another country. Economic, social, cultural, and environmental impacts are considered in the evaluation to capture the wide range of impacts caused by the event.

The evaluation includes relevant costs and benefits in the lead up to the event, including the Draw and Play-Off Tournament, as well as the FIFA WWC Tournament.

Independent impact evaluations were also commissioned and paid for by each Host City. These Host City evaluations leveraged the research plan funded by MBIE and used the same methodology and research provider as this national evaluation. A summary of each Host City evaluation is included in Section 6.3.

## 2.3 Methodology

MBIE's event evaluation framework has been used as the foundation for this evaluation. The framework is based on cost-benefit analysis (CBA) which is a well-established evaluation method used by government agencies and businesses.

A CBA is based on welfare economics which is concerned with maximising societal wellbeing in the broadest possible terms. In practice this means that any type of cost or benefit can be included in a CBA if it can be given a credible monetary value. The main benefit of CBA is that it treats market and non-market costs and benefits equally, which means that non-financial<sup>12</sup> outcomes are given the same status as financial outcomes in the evaluation process.

There are three broad steps in the CBA process:

1. Identify all the relevant costs and benefits associated with the event. There are no restrictions on what can be included, but for practical reasons only material costs and benefits should be carried forward.
2. Assign a monetary value to each of the relevant costs and benefits. This is relatively easy in cases where there is an observable market price or financial transaction. It is more difficult when there are no market valuations to take guidance from, but various methods exist to assign monetary values to non-market costs and benefits.
3. Add up all the costs and benefits and if the gross benefit exceeds the gross cost, then the event has increased societal wellbeing, relative to the counterfactual of not investing in the event.

The table on the next page provides an overview of the evaluation framework that has been applied to the FIFA WWC.

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<sup>11</sup> The alternative scenario against which the results are compared.

<sup>12</sup> This includes social, cultural, and environmental outcomes as outlined in Table 11.



**Table 11: FIFA WWC Evaluation Framework**

Source: MBIE, Fresh Info

| Evaluation component  | Gross Cost (GC) | Gross Benefit (GB) | Net Benefit |
|---|-----------------|--------------------|-------------|
| <b>Government</b>   |                 |                    |             |
| Cost to central and local government agencies                             | 100%            | As measured        | GB – GC     |
| Redistribution of public funds cost <sup>13</sup>                         | 20%             | Nil                | GC          |
|   |                 |                    |             |
| <b>Social</b>   |                 |                    |             |
| Value of time and money devoted to the event by NZ resident attendees     | 100%            | 100% + CS          | CS          |
| Benefits accruing to NZ resident non-attendees                            | 0%              | 100%               | GB          |
|   |                 |                    |             |
| <b>Economic</b>   |                 |                    |             |
| Additional consumption of NZ goods and services                           | 100% x (1-PS)   | 100%               | PS          |
| Externally sourced funds spent in NZ by FIFA                              | 100% x (1-PS)   | 100%               | PS          |
| Commercial sponsorship by NZ resident companies                           | 100%            | 100% + ROI         | ROI         |
| Value of time and money devoted to the FIFA WWC by NZ resident businesses | 100%            | 100% + ROI         | ROI         |
| Event profit accruing to NZ   | 0%              | 100%               | GB          |
| Event income sourced from, and spent in, NZ <sup>14</sup>                 | 0%              | 10%                | GB          |
| Value of media exposure to NZ (conversion model)                          | 0%              | 100%               | GB – GC     |
|   |                 |                    |             |
| <b>Cultural</b>   |                 |                    |             |
| Māori outcomes  | As measured     | As measured        | GB – GC     |
|   |                 |                    |             |
| <b>Environmental</b>  |                 |                    |             |
| Environmental costs and benefits  | As measured     | As measured        | GB – GC     |

GC = gross cost; GB = gross benefit; CS = consumer surplus; PS = producer surplus; ROI = return on investment

<sup>13</sup> Equivalent to 20% of public sector investment, as per Treasury guidelines.

<sup>14</sup> Already counted as a cost elsewhere in the model. This line acknowledges the marginal value of internal expenditure relative to external (out of country) expenditure.





### 2.3.1 Research Plan

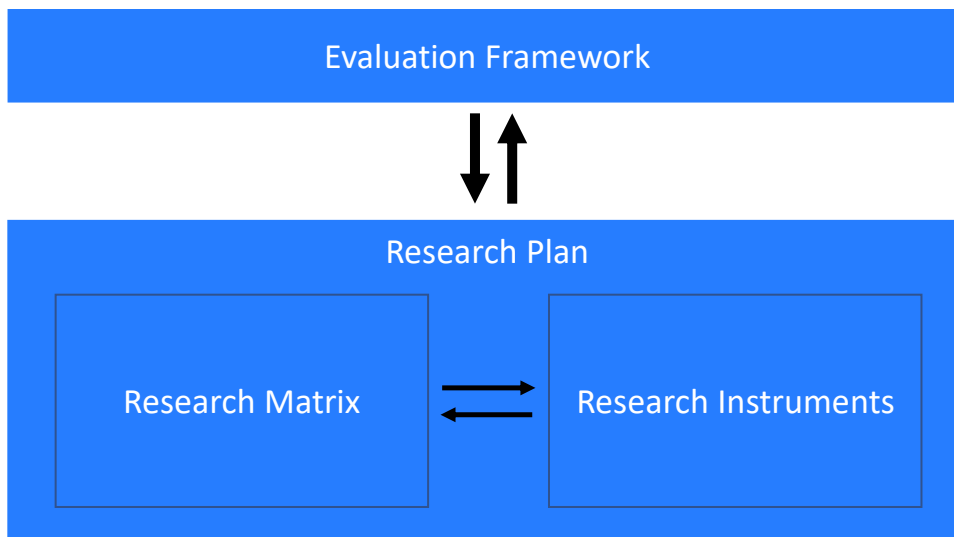
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A comprehensive research plan was developed at the outset of the project in consultation with MBIE to identify the research processes and instruments required to inform the evaluation. The Research Plan had two components:

1. A Research Matrix – a table showing how each component of the Evaluation Framework would be informed. The table included the source(s) of information (respondents) for each evaluation component in Table 11, as well as the specific research instruments used to collect the information.
2. Research Instruments – a description of the specific research instruments used to collect information from respondents.

**Figure 1: Relationship between the FIFA WWC Evaluation Framework and the FIFA WWC Research Plan**

Source: FIFA WWC Research Plan



The Research Matrix in Table 12 shows the evaluation components as rows, the information sources (respondents) as columns, and the specific research instruments used to collect the information as cells.

The information in Table 13 describes the specific research instruments used to collect information from respondents, who the respondents were, and what sample sizes were achieved (where applicable). The final Research Plan was provided to MBIE as a separate PDF document entitled “*Research Plan for FIFA Women’s World Cup 2023*”.



**Table 12: FIFA WWC Research Matrix**

Source: FIFA WWC Research Plan

| Evaluation component   | Central and local government agencies | FIFA | Teams | Event sponsors and partners | Volunteers | Spectators | NZ resident non-attendees | Sport NZ and football organisations |
|--|---------------------------------------|------|-------|-----------------------------|------------|------------|---------------------------|-------------------------------------|
| <b>Government</b>  |                                       |      |       |                             |            |            |                           |                                     |
| Cost to central and local government agencies                          | S1                                    |      |       |                             |            |            |                           | S1                                  |
| <b>Social</b>  |                                       |      |       |                             |            |            |                           |                                     |
| Value of personal time and money devoted to the event by NZ residents  |                                       |      |       |                             | S5         | S6         |                           |                                     |
| Benefits accruing to NZ resident non-attendees                         |                                       |      |       |                             |            |            | S7                        |                                     |
| <b>Economic</b>  |                                       |      |       |                             |            |            |                           |                                     |
| Additional consumption of NZ goods and services                        |                                       | S2   | S3    | S4                          | S5         | S6         |                           |                                     |
| Externally sourced funds spent in NZ                                   |                                       | S2   |       |                             |            |            |                           |                                     |
| Value of time and money devoted to the event by NZ resident businesses |                                       |      |       | S4                          |            |            |                           |                                     |
| Event profit accruing to NZ  |                                       | S2   |       |                             |            |            |                           |                                     |
| Event income sourced from, and spent in, New Zealand                   | S1                                    |      |       |                             |            |            |                           |                                     |
| Value of media exposure to NZ  |                                       | D1   |       |                             |            |            |                           |                                     |
| <b>Environmental</b>   |                                       |      |       |                             |            |            |                           |                                     |
| Value of unpriced carbon emissions                                     | D2                                    | D3   | S4    | S4                          | S5         | S6         |                           |                                     |
| Other environmental indicators (non- $\$$ )                            | D4                                    | D5   |       |                             |            |            |                           |                                     |
| Awareness and perception of sustainability initiatives (non- $\$$ )    |                                       |      |       |                             | S5         | S6         |                           |                                     |
| <b>Cultural</b>  |                                       |      |       |                             |            |            |                           |                                     |
| Perceptions of Māori cultural content and representation (non- $\$$ )  |                                       |      |       |                             | S5         | S6         |                           |                                     |



**Table 13: FIFA WWC Research Instruments**

Source: FIFA WWC Research Plan

| ID | Description of research instruments             | Respondents/source                    | Sample <sup>15</sup> | Draw<br>Oct 2022 | Play-Off<br>Feb 2023 | FIFA WWC<br>Jul 2023 |
|----|---|---------------------------------------|----------------------|------------------|----------------------|----------------------|
| S1 | Survey of central and local government agencies | Central and local government agencies | 36                   |                  |                      | ✓                    |
| S2 | Survey of FIFA                                  | FIFA                                  | n/a                  | ✓                | ✓                    | ✓                    |
| S3 | Survey of FIFA WWC teams                        | FIFA WWC teams                        | 14                   |                  |                      | ✓                    |
| S4 | Survey of event sponsors and partners           | Event sponsors and partners           | 3                    |                  |                      | ✓                    |
| S5 | Survey of volunteers                            | FIFA and Host City volunteers         | 421                  |                  | ✓                    | ✓                    |
| S6 | Survey of spectators                            | Match and FFF attendees               | 6,438                |                  | ✓ <sup>16</sup>      | ✓                    |
| S7 | Survey of NZ resident non-attendees             | NZ resident non-attendees             | 1,504                |                  |                      | ✓                    |
| D1 | Media distribution data                         | FIFA                                  | n/a                  |                  |                      | ✓                    |
| D2 | Carbon emissions data                           | Public sector agencies                | n/a                  |                  |                      | ✓                    |
| D3 | Carbon emissions data                           | FIFA                                  | n/a                  |                  |                      | ✓                    |
| D4 | Data on other environmental indicators          | Public sector agencies                | n/a                  |                  |                      | ✓                    |
| D5 | Data on other environmental indicators          | FIFA                                  | n/a                  |                  |                      | ✓                    |

<sup>15</sup> For the FIFA WWC Tournament.

<sup>16</sup> Match attendees only.



## 3 The event

### 3.1 Structure of the FIFA WWC

New Zealand's co-hosting of the FIFA WWC involved three distinct events:

1. **FIFA WWC Draw** in Auckland on 22 October 2022.
2. **FIFA WWC Play-Off Tournament (inter-confederation play-offs)**, hosted in Hamilton and Auckland between 17 February and 23 February 2023.<sup>17</sup>
3. **FIFA WWC Tournament**, co-hosted in New Zealand and Australia between 20 July and 20 August 2023, with 32 teams playing 64 games over 32 days in nine Host Cities.

#### 3.1.1 The FIFA WWC Draw

The Draw took place at the Aotea Centre in Auckland on 22 October 2022, prior to the completion of qualification. The three winners of the first-ever FIFA Play-Off Tournament were not known at the time of the Draw. The 32 teams were allocated into four pots based on the FIFA Women's World Rankings as at 13 October 2022. Pot One contained co-hosts New Zealand and Australia (both automatically placed in positions A1 and B1, respectively) along with the best six teams. Pot Two contained the next best eight teams, with the next best eight teams being allocated into the following pot (Pot Three). Pot Four contained the lowest ranked teams, along with the placeholders for the three Play-Off Tournament winners. The pots for the draws are shown below.

**Table 14: Pots for the FIFA WWC Draw**

Source: FIFA

| Pot 1             | Pot 2            | Pot 3                    | Pot 4                  |
|-------------------|------------------|--------------------------|------------------------|
| New Zealand (22)  | Canada (7)       | Denmark (18)             | Nigeria (45)           |
| Australia (13)    | Netherlands (8)  | Switzerland (21)         | Philippines (53)       |
| United States (1) | Brazil (9)       | Republic of Ireland (24) | South Africa (54)      |
| Sweden (2)        | Japan (11)       | Columbia (27)            | Morocco (76)           |
| Germany (3)       | Norway (12)      | Argentina (29)           | Zambia (81)            |
| England (4)       | Italy (14)       | Vietnam (34)             | Portugal <sup>18</sup> |
| France (5)        | China PR (15)    | Costa Rica (37)          | Haiti <sup>19</sup>    |
| Spain (6)         | South Korea (17) | Jamaica (43)             | Panama <sup>20</sup>   |

<sup>17</sup> The official Play-Off Tournament matches were held between 18 February and 23 February. Two friendly matches were played on 17 February – New Zealand vs. Portugal and Argentina vs. Chile.

<sup>18</sup> Play-Off Tournament Group A winner.

<sup>19</sup> Play-Off Tournament Group B winner.

<sup>20</sup> Play-Off Tournament Group C winner.



With the exception of UEFA<sup>21</sup>, teams from the same confederation could not be drawn in the same group. However, since each Play-Off Tournament group contained multiple confederations, the placeholders were identified by the seeded teams in their respective play-off pathways to avoid any Draw constraints. The Draw started with Pot One and ended with Pot Four, with the team selected being allocated to the first available group alphabetically. Pot One teams were automatically drawn to position 1 of each group, with the following positions drawn for the remaining pots. The 32 teams were drawn into eight groups (A – H) of 4 teams. Groups A, C, E, and G played all their group matches in New Zealand, and Groups B, D, F, and H played all their group matches in Australia. A full schedule for matches hosted in New Zealand is provided in Table 20.

**Table 15: Teams based in New Zealand for group stage**

Source: FIFA

| Group A     | Group C    | Group E       | Group G      |
|-------------|------------|---------------|--------------|
| New Zealand | Spain      | United States | Sweden       |
| Norway      | Costa Rica | Vietnam       | South Africa |
| Philippines | Zambia     | Netherlands   | Italy        |
| Switzerland | Japan      | Portugal      | Argentina    |

**Table 16: Teams based in Australia for group stage**

Source: FIFA

| Group B             | Group D  | Group F | Group H     |
|---------------------|----------|---------|-------------|
| Australia           | England  | France  | Germany     |
| Republic of Ireland | Haiti    | Jamaica | Morocco     |
| Nigeria             | Denmark  | Brazil  | Columbia    |
| Canada              | China PR | Panama  | South Korea |

### 3.1.2 The FIFA WWC Play-Off Tournament

The Play-Off Tournament (POT) determined the final three qualification spots for the FIFA WWC. New Zealand was confirmed as the sole host nation for the POT on 4 July 2022, with Auckland and Hamilton selected as the Host Cities. The POT took place from 17 to 23 February 2023<sup>22</sup> and featured ten teams from six confederations, as shown in Table 17 below.

**Table 17: Teams contesting the FIFA WWC Play-Off Tournament**

Source: FIFA

| Region                     | Confederation | Teams                    |
|----------------------------|---------------|--------------------------|
| Asia                       | AFC           | Chinese Taipei, Thailand |
| Africa                     | CAF           | Cameroon, Senegal        |
| North and Central Americas | CONCACAF      | Haiti, Panama            |
| South America              | CONMEBOL      | Paraguay, Chile          |
| Oceania                    | OFC           | Papua New Guinea         |
| Europe                     | UEFA          | Portugal                 |

<sup>21</sup> Union of European Football Associations.

<sup>22</sup> The official Play-Off Tournament matches were held between 18 February and 23 February. Two friendly matches were played on 17 February – New Zealand vs. Portugal and Argentina vs. Chile.



The 10 teams were split into three groups of three (Group A and B) or four (Group C). The winner of each group qualified for the FIFA WWC.

Four teams were seeded into groups based on the FIFA Women's World Rankings. In Groups A and B, two unseeded teams faced each other in a semi-final. The winner of the semi-final advanced to the POT final, playing against the seeded team for a spot in the FIFA WWC. In Group C, the two seeded teams faced an unseeded team in the semi-finals. The winners of the semi-finals faced each other in the POT final for a spot in the Women's World Cup.

New Zealand and Argentina (confirmed as guests on 8 December 2022) participated in friendly matches as part of the event, first against one of the seeded teams in Groups A and B, and then twice against each other. Friendly matches also took place between the semi-final loser of Groups A and B, as well as the two semi-final losers of Group C, thereby ensuring that all POT teams played two matches at the event.

The three teams that qualified for the FIFA WWC were:

- Portugal – winners of Group A
- Haiti – winners of Group B
- Panama – winners of Group C.

### 3.1.3 The FIFA WWC Tournament

The FIFA WWC started on 20 July 2023 and finished on 20 August 2023 (32 days). The opening match was contested between New Zealand and Norway at Eden Park in Auckland, and the final was played at Stadium Australia in Sydney. A total of 64 matches were played across the tournament including 48 group stage matches (round robin format) and 16 knock out matches. New Zealand hosted 29 matches including 24 group stage matches and 5 knock out matches. A full match schedule is provided in Appendix 1.

**Table 18: FIFA WWC tournament schedule**

Source: FIFA

|                      | Start       | End         | Matches played in New Zealand | Matches played in Australia | Total matches played |
|----------------------|-------------|-------------|-------------------------------|-----------------------------|----------------------|
| Group stage          | 20 Jul 2023 | 3 Aug 2023  | 24                            | 24                          | 48                   |
| Round of 16          | 5 Aug 2023  | 8 Aug 2023  | 2                             | 6                           | 8                    |
| Quarter-finals       | 11 Aug 2023 | 12 Aug 2023 | 2                             | 2                           | 4                    |
| Semi-finals          | 15 Aug 2023 | 16 Aug 2023 | 1                             | 1                           | 2                    |
| Third place play-off | 19 Aug 2023 | 19 Aug 2023 | 0                             | 1                           | 1                    |
| Final                | 20 Aug 2023 | 20 Aug 2023 | 0                             | 1                           | 1                    |
| TOTAL                | 20 Jul 2023 | 20 Aug 2023 | 29                            | 35                          | 64                   |



The 29 FIFA WWC matches played in New Zealand were allocated to four Host Cities through a bidding process coordinated by MBIE with Football Australia and New Zealand Football:

- Auckland (Eden Park, capacity 43,217)
- Hamilton (Waikato Stadium, capacity 18,009)
- Wellington (Wellington Regional Stadium, capacity 33,132)
- Dunedin (Dunedin Stadium, capacity 25,947)

Auckland hosted 9 matches (6 group stage matches and 3 knock out matches), Hamilton hosted 5 group stage matches, Wellington hosted 9 matches (7 group stage matches and 2 knock out matches) and Dunedin hosted 6 group stage matches.

**Table 19: Allocation of FIFA WWC matches played in New Zealand**

Source: FIFA

|                | Auckland | Hamilton | Wellington | Dunedin | TOTAL |
|----------------|----------|----------|------------|---------|-------|
| Group stage    | 6        | 5        | 7          | 6       | 24    |
| Round of 16    | 1        | 0        | 1          | 0       | 2     |
| Quarter-finals | 1        | 0        | 1          | 0       | 2     |
| Semi-finals    | 1        | 0        | 0          | 0       | 1     |
| TOTAL          | 9        | 5        | 9          | 6       | 29    |

A full schedule of the FIFA WWC matches played in New Zealand is provided in Table 20.

**Table 20: Schedule of FIFA WWC matches played in New Zealand**

Source: FIFA

|  | Stage         | Date       | Team 1        | Team 2        |
|--|---------------|------------|---------------|---------------|
| <b>Auckland</b><br>Eden Park                           | Group A       | 20/07/2023 | New Zealand   | Norway        |
|  | Group E       | 22/07/2023 | United States | Vietnam       |
|  | Group G       | 24/07/2023 | Italy         | Argentina     |
|  | Group C       | 26/07/2023 | Spain         | Zambia        |
|  | Group A       | 30/07/2023 | Norway        | Philippines   |
|  | Group E       | 1/08/2023  | Portugal      | United States |
|  | Round of 16   | 5/08/2023  | Switzerland   | Spain         |
|  | Quarter-final | 11/08/2023 | Japan         | Sweden        |
|  | Semi-final    | 15/08/2023 | Spain         | Sweden        |
| <b>Hamilton</b><br>Waikato<br>Stadium                  | Group C       | 22/07/2023 | Zambia        | Japan         |
|  | Group A       | 25/07/2023 | Switzerland   | Norway        |
|  | Group E       | 27/07/2023 | Portugal      | Vietnam       |
|  | Group C       | 31/07/2023 | Costa Rica    | Zambia        |
|  | Group G       | 2/08/2023  | Argentina     | Sweden        |
| <b>Wellington</b><br>Wellington<br>Regional<br>Stadium | Group C       | 21/07/2023 | Spain         | Costa Rica    |
|  | Group G       | 23/07/2023 | Sweden        | South Africa  |
|  | Group A       | 25/07/2023 | New Zealand   | Philippines   |
|  | Group E       | 27/07/2023 | United States | Netherlands   |
|  | Group G       | 29/07/2023 | Sweden        | Italy         |



|                               |               |            |              |              |
|-------------------------------|---------------|------------|--------------|--------------|
|                               | Group C       | 31/07/2023 | Japan        | Spain        |
|                               | Group G       | 2/08/2023  | South Africa | Italy        |
|                               | Round of 16   | 5/08/2023  | Japan        | Norway       |
|                               | Quarter-final | 11/08/2023 | Spain        | Netherlands  |
| Dunedin<br>Dunedin<br>Stadium | Group A       | 21/07/2023 | Philippines  | Switzerland  |
|                               | Group E       | 23/07/2023 | Netherlands  | Portugal     |
|                               | Group C       | 26/07/2023 | Japan        | Costa Rica   |
|                               | Group G       | 28/07/2023 | Argentina    | South Africa |
|                               | Group A       | 30/07/2023 | Switzerland  | New Zealand  |
|                               | Group E       | 1/08/2023  | Vietnam      | Netherlands  |

### 3.2 Team base camps

Base camps were used by all the FIFA WWC teams to stay in and train before and during the tournament. FIFA announced the hotels and training sites for the 29 qualified participating nations on 11 December 2022 and the three POT winners on 21 March 2023. It was the first World Cup to have dedicated team base camps for the 32 participating nations during the group stage of the tournament. The hotels and training sites used by teams hosted in New Zealand are shown in Table 21.

**Table 21: Team base camps in New Zealand**

Source: FIFA

| City             | Team                | Hotel                             | Training sites                  |
|------------------|---------------------|-----------------------------------|---------------------------------|
| Auckland         | Argentina           | Novotel Auckland Ellerslie        | Michaels Avenue Reserve         |
|                  | Italy               | Grand Millennium Auckland         | Shepherds Park                  |
|                  | New Zealand         | Pullman Auckland                  | Keith Hay Park                  |
|                  | Norway              | M Social Auckland                 | Seddon Fields                   |
|                  | Philippines         | Mövenpick Hotel                   | Olympic Park Auckland           |
|                  | Portugal            | Waipuna Hotel & Conference Centre | Māngere Centre Park             |
|                  | United States       | Sofitel Auckland Viaduct Harbour  | Bay City Park                   |
|                  | Vietnam             | Rydges Auckland                   | Fred Taylor Park                |
| Hamilton         | Zambia              | Novotel Hamilton Tainui           | Korikori Park                   |
| Tauranga         | Netherlands         | Trinity Wharf                     | Bay Oval                        |
| Palmerston North | Spain <sup>23</sup> | Cophthorne Palmerston North       | Massey Sport Institute          |
| Wellington       | South Africa        | InterContinental Hotel Wellington | Porirua Park                    |
|                  | Sweden              | NZCIS Accommodation Wellington    | NZ Campus of Innovation & Sport |
| Christchurch     | Costa Rica          | Distinction Christchurch Hotel    | Ngā Puna Wai Sports Hub         |
|                  | Japan               | Rydges Latimer Christchurch       | Christchurch Stadium            |
| Dunedin          | Switzerland         | Distinction Dunedin Hotel         | Tahuna Park                     |

<sup>23</sup> Spain relocated to Wellington midway through the tournament.





### 3.3 Ticketing

A total of 2.04 million match tickets were issued across the tournament at an average of 31,814 tickets per match. The 29 matches hosted in New Zealand accounted for 37% of tickets issued (744,236) and the 35 matches hosted in Australia accounted for the remaining 63% (1,291,861). The average number of tickets issued per match in New Zealand was 25,663 compared with 36,910 in Australia.

**Table 22: Summary of FIFA WWC ticketing**

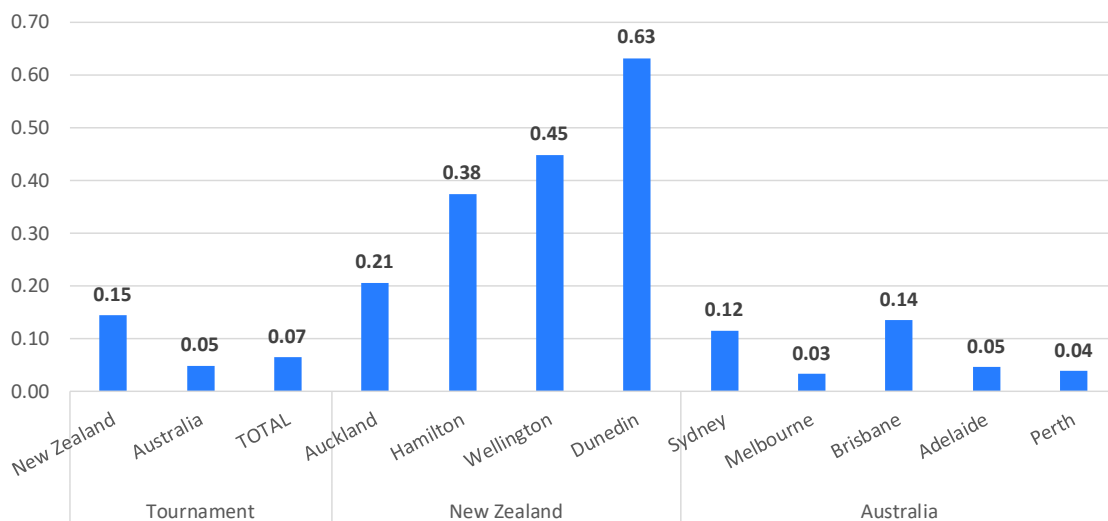
Source: FIFA

| Host City          | Matches   | Tickets issued   | Share of tickets issued | Average tickets issued per match |
|--------------------|-----------|------------------|-------------------------|----------------------------------|
| Auckland           | 9         | 350,719          | 17%                     | 38,969                           |
| Hamilton           | 5         | 67,489           | 3%                      | 13,498                           |
| Wellington         | 9         | 243,645          | 12%                     | 27,072                           |
| Dunedin            | 6         | 82,383           | 4%                      | 13,731                           |
| <b>New Zealand</b> | <b>29</b> | <b>744,236</b>   | <b>37%</b>              | <b>25,663</b>                    |
| Sydney             | 11        | 611,818          | 30%                     | 55,620                           |
| Melbourne          | 6         | 167,700          | 8%                      | 27,950                           |
| Brisbane           | 8         | 357,580          | 18%                     | 44,698                           |
| Adelaide           | 5         | 66,977           | 3%                      | 13,395                           |
| Perth              | 5         | 87,786           | 4%                      | 17,557                           |
| <b>Australia</b>   | <b>35</b> | <b>1,291,861</b> | <b>63%</b>              | <b>36,910</b>                    |
| <b>Tournament</b>  | <b>64</b> | <b>2,036,097</b> | <b>100%</b>             | <b>31,814</b>                    |

The number of tickets issued per capita was 0.15 for New Zealand matches compared with 0.05 for Australian matches, as shown in Figure 2. The per capita issuance rates in New Zealand ranged between 0.21 in Auckland and 0.63 in Dunedin. The highest per capita issuance rate in Australia was Brisbane at 0.14.

**Figure 2: Number of tickets issued per capita**

Source: FIFA, Stats NZ, Australian Bureau of Statistics





### 3.4 Government investment

Planning and delivering the FIFA WWC required a considerable investment of time and/or money from a wide range of central and local government agencies. This investment began soon after New Zealand was awarded co-hosting rights in 2020 and extended beyond the conclusion of the FIFA WWC in August 2023. The following central and local government agencies played some role in the planning and/or delivery of the FIFA WWC.

**Table 23: Central and local government agencies involved in FIFA WWC planning and/or delivery**

Source: MBIE, Fresh Info

| Central government agencies                     | Local government agencies     |
|---|-------------------------------|
| Aviation Security Service                       |                               |
| CERT NZ   | <b>Auckland</b>               |
| Civil Aviation Authority                        | Auckland Council              |
| Combined Threat Assessment Group                | Tātaki Auckland Unlimited     |
| Department of Conservation                      | Auckland Transport            |
| Department of Internal Affairs                  | Eke Panuku                    |
| Department of the Prime Minister and Cabinet    |                               |
| Fire and Emergency New Zealand                  | <b>Hamilton</b>               |
| Ministry of Business, Innovation and Employment | H3 Group                      |
| Ministry for Culture and Heritage               | Hamilton City Council         |
| Ministry for Ethnic Communities                 |                               |
| Ministry for Pacific Peoples                    | <b>Tauranga</b>               |
| Ministry for Primary Industries                 | Tauranga City Council         |
| Ministry for Women                              |                               |
| Ministry of Education                           | <b>Palmerston North</b>       |
| Ministry of Foreign Affairs and Trade           | Palmerston North City Council |
| Ministry of Health                              |                               |
| Ministry of Transport                           | <b>Wellington</b>             |
| Ministry of Youth Development                   | WellingtonNZ                  |
| National Emergency Management Agency            | Wellington City Council       |
| New Zealand Customs Service                     |                               |
| New Zealand Defence Force                       | <b>Christchurch</b>           |
| New Zealand Police                              | ChristchurchNZ                |
| New Zealand Story                               | Christchurch City Council     |
| New Zealand Trade and Enterprise                |                               |
| Sport New Zealand                               | <b>Dunedin</b>                |
| Te Puni Kōkiri                                  | Dunedin City Council          |
| Te Taura Whiri I te reo Māori                   |                               |
| Te Whatu Ora                                    |                               |
| Tertiary Education Commission                   |                               |
| Tourism New Zealand                             |                               |
| Waka Kotahi New Zealand Transport Agency        |                               |
| WorkSafe New Zealand                            |                               |



In aggregate these agencies invested \$101.1 million in FIFA WWC-related initiatives – as shown in Table 24 – with central government agencies contributing \$64.9 million (64.2%) and local government agencies the remaining \$36.1 million (35.8%).

Around 73.5% of government investment was directed to core delivery expenses and 26.5% to leverage and legacy initiatives.

**Table 24: Central and local government investment in the FIFA WWC**

Source: All relevant central and local government agencies

|                                     | Central government (\$m) | Local government (\$m) | TOTAL (\$m)    | Share         |
|-------------------------------------|--------------------------|------------------------|----------------|---------------|
| Core delivery expense <sup>24</sup> | \$42.1                   | \$32.1                 | \$74.3         | 73.5%         |
| Leverage and legacy                 | \$22.8                   | \$4.0                  | \$26.8         | 26.5%         |
| <b>TOTAL</b>                        | <b>\$64.9</b>            | <b>\$36.1</b>          | <b>\$101.1</b> | <b>100.0%</b> |
| Share                               | 64.2%                    | 35.8%                  | 100.0%         |               |

<sup>24</sup> Core delivery expenses are expenses required to meet FIFA requirements and/or deliver the essential (non-discretionary) components of the event. This may differ from how some government agencies categorised their expenditure.



## 4 Event attendance

### 4.1 Attendance profile

This section presents estimates of the number of people who attended FIFA WWC events in person in New Zealand. This includes people who attended a FIFA WWC match and/or visited a FIFA Fan Festival site in New Zealand. Each attendee is counted only once, even if they interacted with the event multiple times. All FIFA WWC attendees have been allocated to one of the following groups for presentation purposes:

- FIFA – FIFA Zurich staff and contractors, Local FIFA Subsidiary New Zealand (LFS New Zealand) staff and contractors, Local FIFA Subsidiary Australia (LFS Australia) staff and contractors, and match officials;<sup>25</sup>
- Teams – FIFA WWC players and team staff;
- Broadcast and media staff and contractors – Media Rights Licensees (MRLs) and independent media;
- Volunteers – all FIFA and Host City volunteers; and
- Spectators – people not involved in the delivery of the event who attended a FIFA WWC match and/or visited a FIFA Fan Festival site in New Zealand.

A total of 258,527 people attended the FIFA WWC in person in New Zealand. Over 98% (254,753) of the 258,527 FIFA WWC attendees were spectators, with volunteers being the next largest group at 1,582.

Of the 258,527 attendees, 87.5% were New Zealand residents and the remaining 12.5% were international visitors. It is important to note that not all international visitors who attended the FIFA WWC travelled to New Zealand because of FIFA WWC – some were visiting New Zealand for other reasons and chose to experience the FIFA WWC while they were here. This is discussed further in Section 5.2.

**Table 25: Count and composition of unique FIFA WWC attendees (counting each person only once)**

Source: Surveys of spectators (n=6,438) and volunteers (n=421), FIFA WWC stakeholder surveys and interviews

|                     | New Zealand residents | International visitors | TOTAL          | Share         |
|---------------------|-----------------------|------------------------|----------------|---------------|
| FIFA                | 260                   | 328                    | 588            | 0.2%          |
| Teams               | 45                    | 816                    | 861            | 0.3%          |
| Broadcast and media | 136                   | 607                    | 743            | 0.3%          |
| Volunteers          | 1,543                 | 39                     | 1,582          | 0.6%          |
| Spectators          | 224,286               | 30,467                 | 254,753        | 98.5%         |
| <b>TOTAL</b>        | <b>226,270</b>        | <b>32,257</b>          | <b>258,527</b> | <b>100.0%</b> |
| Share               | 87.5%                 | 12.5%                  | 100.0%         |               |

<sup>25</sup> FIFA planning pre-visits are included in these counts but were much lower than expected due to COVID-19.



## 4.2 Spectators

Spectators accounted for over 98% of all FIFA WWC attendees and were therefore an important segment from an evaluation perspective. The nearly four-week duration of the FIFA WWC in New Zealand gave spectators multiple opportunities to interact with the event. The results below are based on a post-event online survey of 6,438 spectators.

### 4.2.1 Value received by FIFA WWC spectators

Understanding the value to New Zealand residents of being able to experience the FIFA WWC in person is a critical part of estimating the social impact of the FIFA WWC. This was estimated by including the following question in the post-event survey of spectators:

*“How would you describe the value you gained from your FIFA Women’s World Cup 2023 experiences relative to the time and money you committed to them?”*

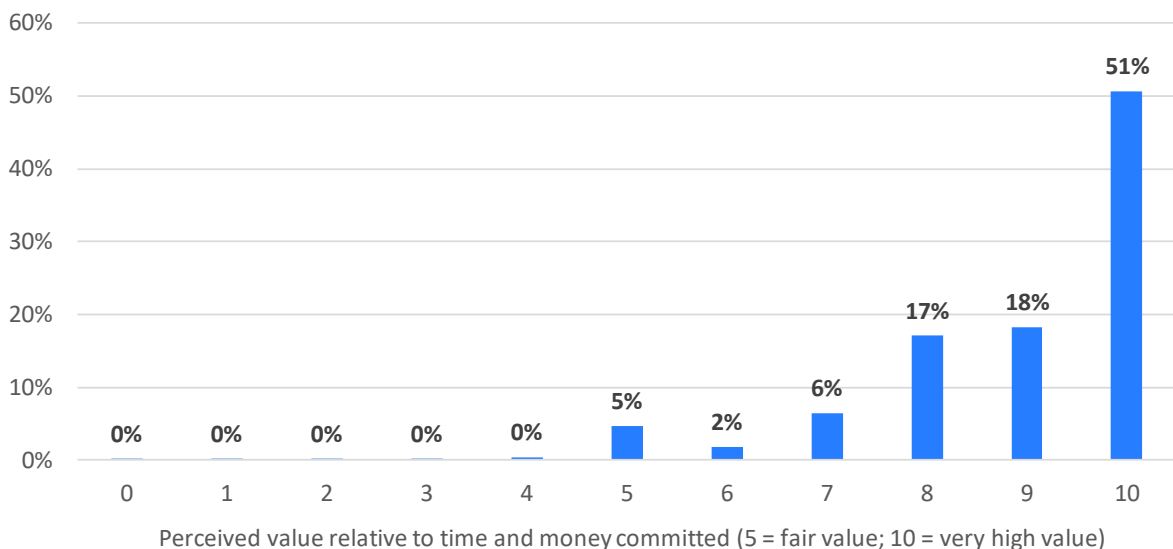
Respondents were presented with a value scale of 0 – 10 where:

- 0 is equivalent to “very low value”
- 5 is equivalent to “fair value”
- 10 is equivalent to “very high value”.

Almost 100% of respondents reported receiving “fair value” (5) or higher and 51% reported “very high value” (10), with an average score of 8.9 out of 10. This indicates that the value derived by an average spectator comfortably exceeded the value of the time and money they invested in the event and provides strong evidence of a positive and significant social value (consumer surplus) for spectators. These results are used to estimate the social value accruing to spectators in Section 6.

**Figure 3: Perceived value to spectators relative to the time and money committed to the FIFA WWC**

Source: Post-event survey of spectators (n=6,438)





## 4.2.2 Spectator satisfaction

A series of satisfaction questions were included in the post-event survey of spectators to determine the effectiveness of various components of the event. Respondents were presented with the list of responses shown in Figure 4 below and were asked:

*“How satisfied were you with the following aspects of the FIFA Women’s World Cup 2023?”*

The results in Figure 4 show the percentage of respondents who were satisfied or very satisfied with each component of the event.

Overall satisfaction was very high – with 97% of respondents being satisfied or very satisfied with their overall FIFA WWC experience. The components respondents were most satisfied with were:

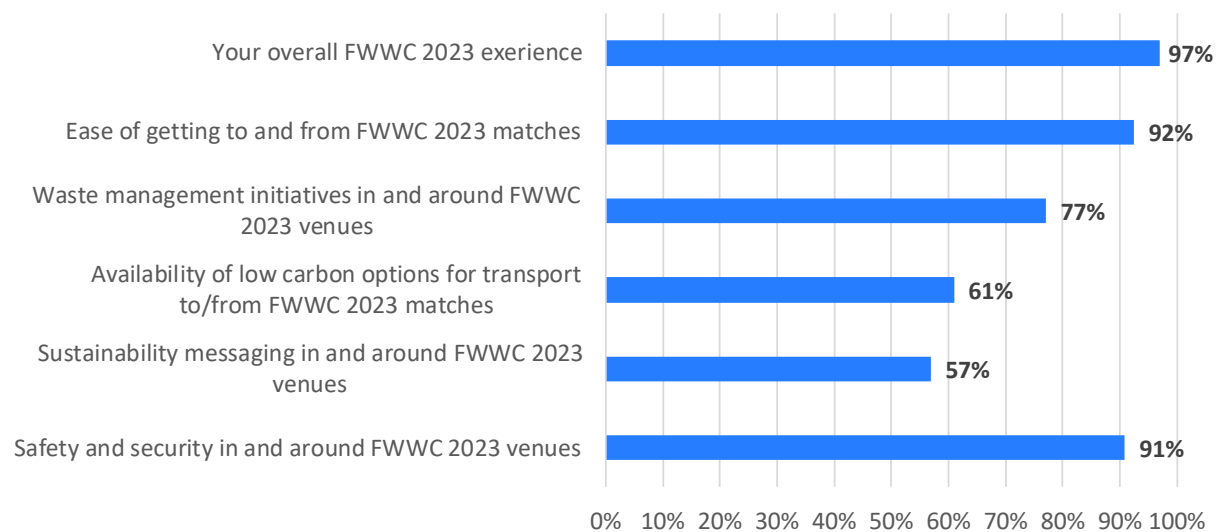
- ease of getting to and from FIFA WWC matches (92%)
- safety and security in and around FIFA WWC venues (91%).

The components respondents were least satisfied with were:

- sustainability messaging in and around FIFA WWC venues (57%)
- availability of low carbon options for transport to/from FIFA WWC venues (61%).

**Figure 4: Spectator satisfaction with key elements of the FIFA WWC**

Source: Post-event survey of spectators (n=6,438)



The following question was included in the post-event survey of spectators to calculate a Net Promoter Score<sup>26</sup>:

*“How likely would you be to recommend the FIFA Women’s World Cup 2023 to other people?”*

Respondents were presented with an 11-point scale of 0 (extremely unlikely) to 10 (extremely likely). Those scoring 6 or less are classified as “Detractors”, 7 or 8 as “Neutrals”, and 9 or 10 as “Promoters”. The Net Promoter Score of 75 was calculated by subtracting the percentage of respondents who were Detractors (4%)

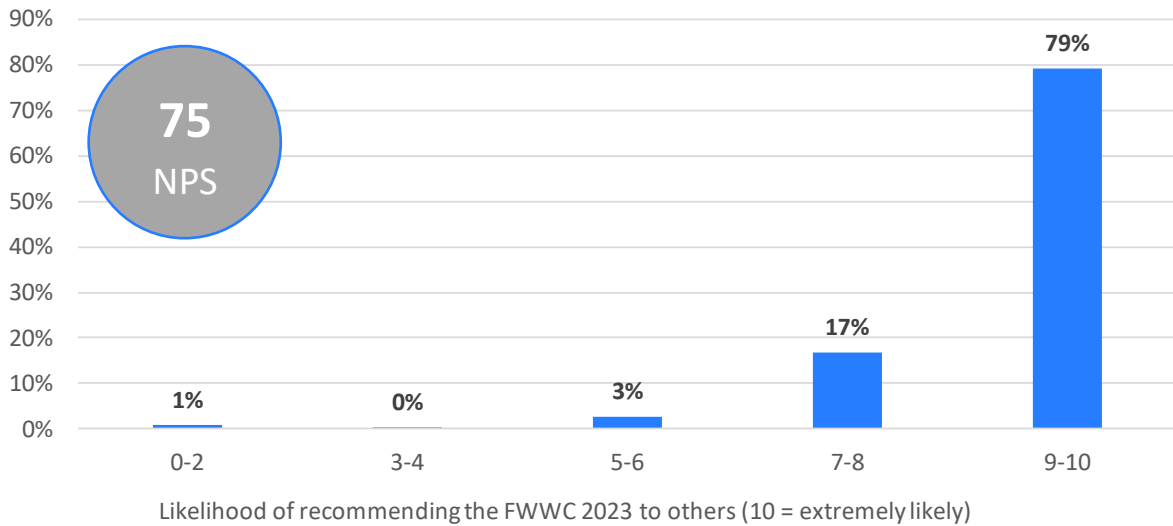
<sup>26</sup> A Net Promoter Score (NPS) is a widely used customer loyalty and satisfaction measurement that lies between -100 and 100. A score of 100 indicates that 100% of people are likely to recommend the good, service or experience in question to others.



from the percentage who were Promoters (79%). A Net Promoter Score of 75 would be considered very high in the commercial world and benchmarks well against companies like Apple (50) and Google (45).<sup>27</sup> It also benchmarks well against other large sports events (more than 10,000 attendees) held in New Zealand which have a median Net Promoter Score of 58<sup>28</sup>.

**Figure 5: Spectator likelihood of recommending FIFA WWC matches to other people**

Source: Post-event survey of spectators (n=6,438)



#### 4.2.3 Impact on spectator civic pride and liveability

Questions were included in the post-event survey of spectators to assess the impact of hosting the FIFA WWC on New Zealand residents' pride and liveability. Respondents who lived in a Host City were asked how strongly they agreed with the statements presented in Table 26. The results showed that:

- 91% of spectators living in a Host City thought that hosting the FIFA WWC increased their pride in their city
- 91% of spectators living in a Host City thought that hosting the FIFA WWC made their city a more enjoyable place to live.

**Table 26: Impact of hosting the FIFA WWC on resident pride and liveability**

Source: Post-event survey of spectators (n=6,438)

| Statements presented to respondents                               | Share of respondents who agreed or strongly agreed |
|---|--|
| Hosting the FIFA WWC increases my pride in my city                | 91%  |
| Hosting the FIFA WWC makes my city a more enjoyable place to live | 91%  |

<sup>27</sup> Net Promoter Scores sourced from <https://www.comparably.com/brands/google>.

<sup>28</sup> Based on large sports events since 2019 evaluated using Event Economics - a proprietary event evaluation model used by many local councils in New Zealand ([www.eventeconomics.com](http://www.eventeconomics.com)).



## 4.3 Volunteers

The 1,582 official volunteers in New Zealand, including 1,543 New Zealand residents, played a critical role in the delivery of the FIFA WWC despite only accounting for 0.7% of event attendees. The results in this section are based on a post-event online survey of 421 volunteers.

### 4.3.1 Value received by FIFA WWC volunteers

Understanding the value to New Zealand residents of being able to experience the FIFA WWC in person is a critical part of estimating the social impact of the FIFA WWC. This was estimated by including the following question in the post-event survey of volunteers:

*“How would you describe the value you gained from your FIFA Women’s World Cup 2023 experiences relative to the time and money you committed to them?”*

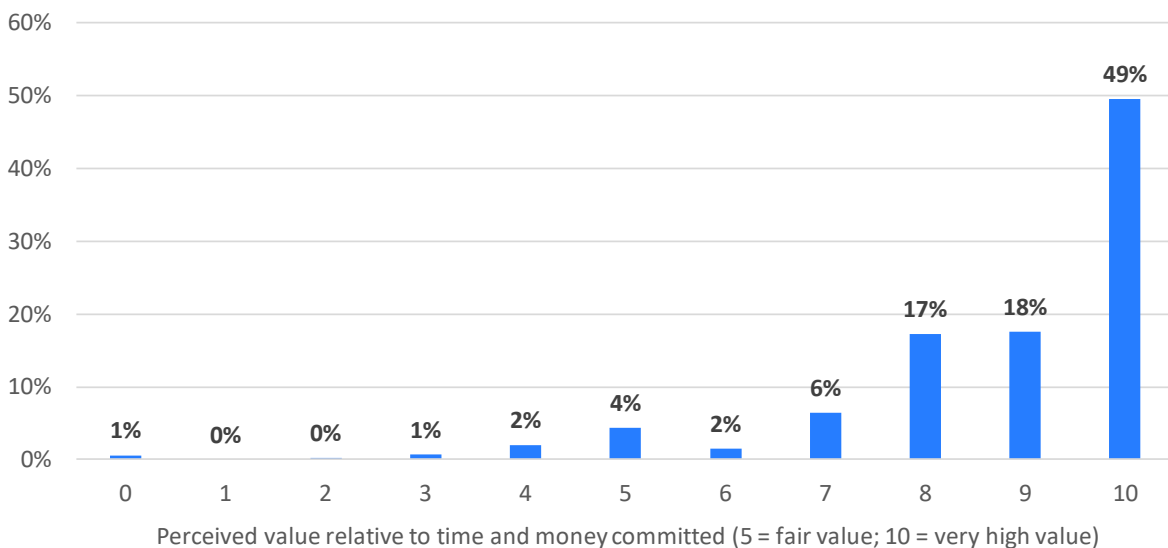
Respondents were presented with a value scale of 0 – 10 where:

- 0 is equivalent to “very low value”
- 5 is equivalent to “fair value”
- 10 is equivalent to “very high value”.

Around 96% of respondents reported receiving “fair value” (5) or higher and 49% reported “very high value” (10), with an average score of 8.8 out of 10. This indicates that the value derived by an average volunteer comfortably exceeded the value of the time and money they invested in the event and provides strong evidence of a positive and significant social value (consumer surplus) for spectators. These results are used to estimate the social value accruing to spectators in Section 6.

**Figure 6: Perceived value to volunteers relative to the time and money committed to the FIFA WWC**

Source: Post-event survey of volunteers (n=421)







### 4.3.2 Volunteer satisfaction

A series of satisfaction questions were included in the post-event survey of volunteers to determine the effectiveness of various aspects of their volunteering experience. Respondents were presented with the list of responses shown in Figure 7 below and were asked:

*“How satisfied were you with the following aspects of your volunteering experience at the FIFA WWC?”*

The results in Figure 7 show the percentage of people who were satisfied or very satisfied with each aspect of their volunteering experience.

Overall satisfaction was very high, with 96% of respondents being satisfied or very satisfied with their overall FIFA WWC volunteering experience. The components respondents were most satisfied with were:

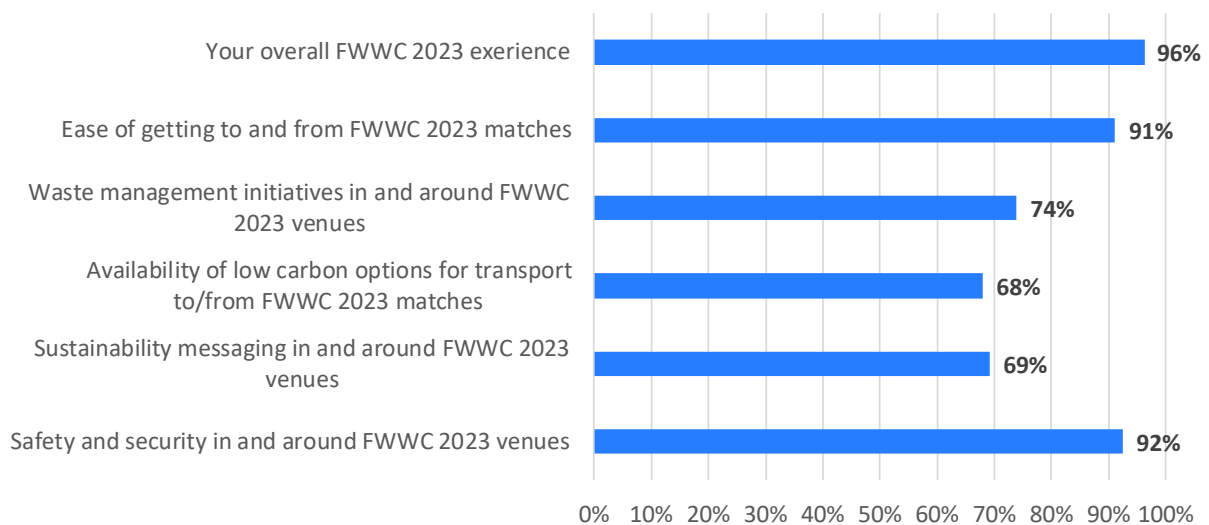
- safety and security in and around FIFA WWC events (92%)
- ease of getting to and from volunteering shifts (91%).

The components respondents were least satisfied with were:

- availability of low carbon options for transport to/from FIFA WWC events (68%)
- sustainability messaging in and around FIFA WWC venues (69%).

**Figure 7: Volunteer satisfaction with key elements of the FIFA WWC**

Source: Post-event survey of volunteers (n=421)





A question was included in the post-event survey of volunteers to calculate a Net Promoter Score (see definition on page 26). Respondents were asked on a scale of 0 – 10:

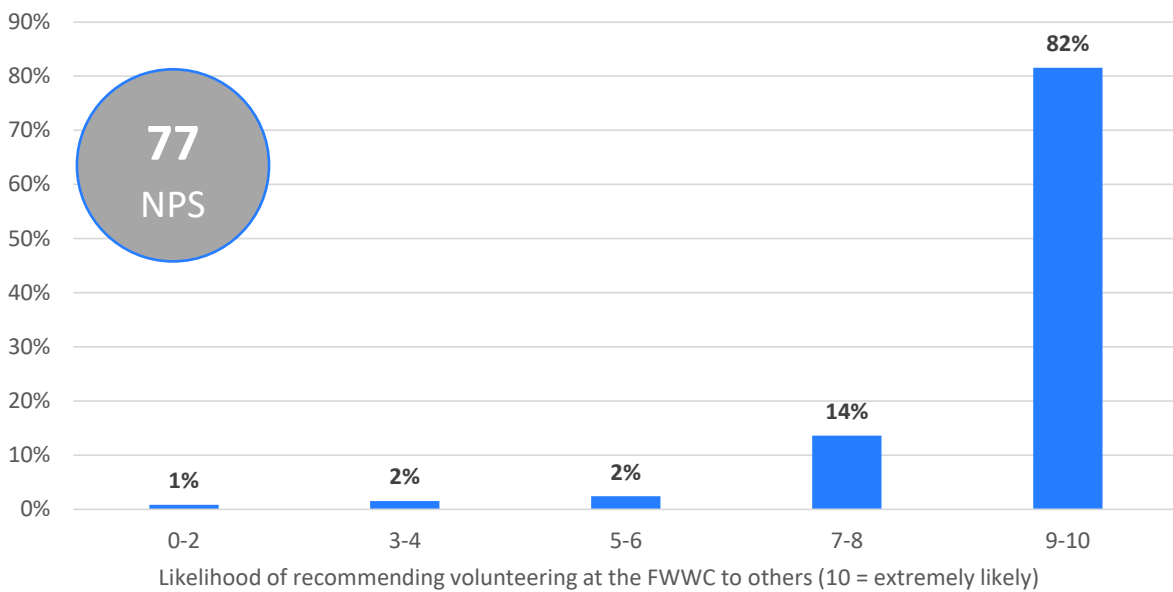
*“How likely would you be to recommend volunteering at the FIFA WWC to other people?”*

Those scoring 6 or less were classified as “Detractors”, 7 or 8 as “Neutrals”, and 9 or 10 as “Promoters”. The Net Promoter Score of 77 was then calculated by subtracting the percentage of respondents who were Detractors (5%) from the percentage who were Promoters (82%).

A Net Promoter Score of 77 would be very good for a business (Apple’s Net Promoter Score is 50 and Google’s is 45), but there is insufficient benchmark data available to know whether this is a good score for a volunteer programme.

**Figure 8: Likelihood of recommending volunteering at a FIFA WWC to others**

Source: Post-event survey of volunteers (n=421)





### 4.3.3 Impact on volunteer civic pride and liveability

Questions were included in the post-event survey of volunteers to assess the impact of hosting the FIFA WWC on their civic pride and liveability. Respondents who lived in a Host City were asked how strongly they agreed with the statements presented in Table 27. The results showed that:

- 96% of volunteers living in a Host City thought that hosting the FIFA WWC increased their pride in their city
- 95% of volunteers living in a Host City thought that hosting the FIFA WWC made their city a more enjoyable place to live.

**Table 27: Impact of hosting the FIFA WWC on volunteer pride and liveability**

Source: Post-event survey of volunteers (n=421)

| Statements presented to respondents                               | Share of volunteer respondents who agreed or strongly agreed |
|---|--|
| Hosting the FIFA WWC increases my pride in my city                | 96%  |
| Hosting the FIFA WWC makes my city a more enjoyable place to live | 95%  |

### 4.3.4 Accessibility of volunteer programmes

Accessibility was an important consideration when designing the volunteer programmes (FIFA and Host City programmes), so a question was included in the post-event volunteer survey asking respondents:

*“Do you have a long-term physical, mental, intellectual or sensory impairment/disability?”*

Around 7% of respondents answered ‘Yes’ to this question. A follow-up question was then presented to these respondents asking them:

*“Were your impairment/disability needs met as a volunteer?”*

Around 84% of respondents who reported having a long-term physical, mental, intellectual, or sensory impairment/disability said their needs were met as a volunteer.

**Table 28: Accessibility of volunteer programmes**

Source: Post-event survey of volunteers (n=421)

| Measure  | Share of respondents |
|--|----------------------|
| Share of respondents with a long-term physical, mental, intellectual, or sensory impairment/disability | 7%                   |
| Share of respondents whose impairment/disability needs were met as a volunteer                         | 84%                  |



## 5 Impact on New Zealand

This section presents data and commentary on the social, cultural, environmental, and economic impacts of the FIFA WWC on New Zealand. It is intended to be as comprehensive as possible, subject to data constraints. The results in this section provide the building blocks for the cost-benefit analysis for New Zealand presented in Section 6.

### 5.1 Event attendance by New Zealand residents

One of the key drivers of the social benefit to New Zealand of hosting the FIFA WWC is the level of in-person engagement New Zealand residents had with the event.

The purpose of this section is to identify the number of New Zealand residents who engaged with the event as spectators or volunteers and to understand how much time and money these groups committed to the FIFA WWC. This is used to inform the cost-benefit analysis in Section 6.

A total of 226,270 New Zealand residents attended the FIFA WWC in person. This figure counts each attendee only once, even if they interacted with the event multiple times, and includes those involved in the event (FIFA staff and contractors, teams, broadcast/media staff and contractors, volunteers) and spectators (people not involved in the delivery of the event who attended a FIFA WWC match and/or visited a FIFA Fan Festival site in New Zealand).

**Table 29: Count and composition of unique New Zealand resident FIFA WWC attendees**

Source: Post-event surveys of spectators (n=6,438) and volunteers (n=421), FIFA WWC stakeholder surveys and interviews

|                     | New Zealand residents | Share         |
|---------------------|-----------------------|---------------|
| FIFA                | 260                   | 0.1%          |
| Teams               | 45                    | 0.0%          |
| Broadcast and media | 136                   | 0.1%          |
| Volunteers          | 1,543                 | 0.7%          |
| Spectators          | 224,286               | 99.1%         |
| <b>TOTAL</b>        | <b>226,270</b>        | <b>100.0%</b> |



### 5.1.1 New Zealand resident spectators

Spectators accounted for around 99% of all New Zealand resident FIFA WWC attendees and were therefore an important segment from an evaluation perspective. The nearly four-week duration of the FIFA WWC in New Zealand gave spectators multiple opportunities to interact with the event.

The average time commitment to in-person FIFA WWC experiences by New Zealand residents was 14.3 hours per spectator across the entire event. This excludes time spent watching matches on television.

This is a significant amount of time when scaled across the event population (3.21 million person hours) that had an estimated value of \$33.2 million when combined with value-of-time estimates provided by Waka Kotahi NZ Transport Agency. This is a critical data point for estimating the social value New Zealand residents derived from attending the FIFA WWC because it is one of the costs that New Zealand resident spectators incurred to access the benefits of attending the FIFA WWC.

Another critical data point for estimating social value is the amount of money New Zealand resident spectators spent on event-related goods and services. This was estimated by asking respondents in the post-event survey of spectators:

- which event-related goods and services they spent money on
- how much money they spent on those goods and services
- how many people their reported expenditure covered (to avoid double-counting).

The methodology used to collect this information was consistent with the methodology used by MBIE to collect expenditure information from international visitors in its International Visitor Survey (IVS). The results showed that New Zealand residents spent around \$29.1 million on event-related goods and services excluding FIFA WWC tickets and merchandise, which are considered elsewhere.

The total value of the time and money invested in the FIFA WWC by New Zealand resident spectators was therefore \$62.3 million, comprising a value-of-time cost of \$33.2 million and an event-related expenditure cost (excluding FIFA WWC tickets and merchandise) of \$29.1 million. Collectively these represent the costs that New Zealand resident spectators incurred to access the benefits of attending the FIFA WWC, in addition to FIFA WWC tickets and merchandise which are considered elsewhere.

**Table 30: In-person engagement with the FIFA WWC by New Zealand resident spectators**

Source: Post-event survey of spectators (n=6,438)

|  | Value     |
|--|-----------|
| New Zealand residents                                    | 224,286   |
| Average time commitment per NZ resident (hours)          | 14.3      |
| Total time commitment by NZ residents (hours)            | 3,207,290 |
| Value of time and money commitment by NZ residents (\$m) | \$62.3    |
| Value-of-time commitment by NZ residents (\$m)           | \$33.2    |
| Value of expenditure by NZ residents (\$m)               | \$29.1    |



### 5.1.2 New Zealand resident volunteers

Volunteers played a critical role in the delivery of the FIFA WWC, and over 97% (1,543) of these people were New Zealand residents. The average time commitment to volunteering by New Zealand residents was 70.6 hours across the entire event. This is a significant amount of time when scaled across the volunteer population (108,945 person hours) that had an estimated value of \$1.13 million when combined with value-of-time estimates provided by Waka Kotahi NZ Transport Agency. This is a critical data point for estimating the social value New Zealand residents derived from volunteering at the FIFA WWC because it is one of the costs that New Zealand resident volunteers incurred to access the benefits of hosting the FIFA WWC.

Volunteers were also asked how much money they spent on volunteering at the FIFA WWC using the same methodology applied to spectators. The results show that volunteers from New Zealand spent around \$0.22 million on event-related goods and services excluding FIFA WWC tickets and merchandise, which are considered elsewhere.

The total value of the time and money invested in the FIFA WWC by New Zealand resident volunteers was therefore \$1.35 million, comprising a value-of-time cost of \$1.13 million and an event-related expenditure cost (excluding FIFA WWC tickets and merchandise) of \$0.22 million. Collectively these represent the costs that New Zealand resident volunteers incurred to access the benefits of hosting the FIFA WWC, in addition to FIFA WWC tickets and merchandise which are considered elsewhere.

**Table 31: Engagement with the FIFA WWC by New Zealand resident volunteers**

Source: Post-event survey of volunteers (n=421)

|  | Value   |
|--|---------|
| New Zealand residents                                    | 1,543   |
| Average time commitment per NZ resident (hours)          | 70.6    |
| Total time commitment by NZ residents (hours)            | 108,951 |
| Value of time and money commitment by NZ residents (\$m) | \$1.35  |
| Value-of-time commitment by NZ residents (\$m)           | \$1.13  |
| Value of expenditure by NZ residents (\$m)               | \$0.22  |

## 5.2 Tourism activity in New Zealand attributable to the FIFA WWC

One of the key drivers of the financial benefit to New Zealand of hosting the FIFA WWC was the amount of additional tourism expenditure the event created. Estimating this required a detailed understanding of the international tourism activity created by the FIFA WWC in New Zealand. The visitor activity created by the FIFA WWC was also an important input into the carbon production estimates in Section 5.4.

The purpose of this section is to identify the number, composition, and tourism behaviour of international visitors whose main reason for travelling to New Zealand was attending the FIFA WWC. This precludes international visitors who attended the FIFA WWC but were not attracted to New Zealand by the event. The exclusion of these attendees means that the visitor numbers presented below are in some cases lower than the attendee estimates presented in Section 5.1.

The results of the tourism analysis showed that the FIFA WWC attracted 26,915 international visitors to New Zealand. These visitors generated 312,008 visitor nights at an average of 11.6 nights per visitor. A visitor night is equivalent to one person staying one night in New Zealand in any form of private or commercial accommodation.



**Table 32: Number of people who visited New Zealand to attend the FIFA WWC**

Source: Post-event surveys of spectators (n=6,438) and volunteers (n=421), FIFA WWC stakeholder surveys and interviews

|                     | International visitors to New Zealand | Visitor nights in New Zealand | Average nights in New Zealand per visitor |
|---------------------|---------------------------------------|-------------------------------|---|
| FIFA                | 328                                   | 10,703                        | 32.6                                      |
| Teams               | 816                                   | 26,194                        | 32.1                                      |
| Broadcast and media | 607                                   | 9,409                         | 15.5                                      |
| Volunteers          | 26                                    | 745                           | 28.7                                      |
| Spectators          | 25,138                                | 264,958                       | 10.5                                      |
| <b>TOTAL</b>        | <b>26,915</b>                         | <b>312,008</b>                | <b>11.6</b>                               |

### 5.3 Additional expenditure in New Zealand attributable to the FIFA WWC

This section estimates the amount of additional expenditure that occurred in New Zealand due to the hosting of the FIFA WWC. Expenditure by New Zealand residents and businesses is not considered to be additional unless there is a high likelihood it would have been spent outside New Zealand in the absence of the event.

Additional expenditure was generated in New Zealand through two main channels:

1. The expenditure required to plan and deliver the event (event operations). This includes expenditure by central and local government agencies, and LFS New Zealand. LFS New Zealand's expenditure was funded through various channels including ticketing revenue, sponsorship revenue, government funding, and direct investment by FIFA Zurich.
2. Expenditure in New Zealand by international FIFA WWC attendees (international visitors). This includes expenditure on traditional tourism goods and services (accommodation, meals, transport, retail shopping etc) as well as expenditure on big-ticket items and/or goods and services that were of a business nature or not for personal consumption.

The estimates of additional expenditure in New Zealand due to the hosting of the FIFA WWC are presented below.

#### 5.3.1 Event operations

Financial data provided by FIFA have been combined with expenditure data provided by central and local government agencies to construct the estimates in Table 33. These estimates show that \$193.7 million was spent on the planning and delivery of the New Zealand component of the FIFA WWC, with \$193 million of this being spent in New Zealand.

Analysis of income sources shows that New Zealand was the source of \$90.9 million of the income required to fund this expenditure, so event operations resulted in a net inflow of expenditure to New Zealand of \$102.1 million (the difference between what it contributed to income and what it received in expenditure).



**Table 33: Additional expenditure in New Zealand attributable to FIFA WWC event operations (\$m)**

Source: LFS New Zealand, relevant central and local government agencies

|   | New Zealand (\$m) | Overseas (\$m)  | TOTAL (\$m)  |
|---|-------------------|-----------------|--------------|
| Source of event operations income           | \$90.9            | \$102.8         | \$193.7      |
| Destination of event operations expenditure | \$193.0           | \$0.7           | \$193.7      |
| <b>Net inflow/outflow</b>                   | <b>\$102.1</b>    | <b>-\$102.1</b> | <b>\$0.0</b> |

### 5.3.2 International visitors

The other major source of financial benefit for New Zealand was expenditure by visiting FIFA WWC attendees. This included FIFA, teams, independent broadcast and media staff, volunteers, and spectators.

Total expenditure in New Zealand by international FIFA WWC attendees was \$80.4 million. This included \$73.2 million on traditional tourism goods and services (accommodation, meals, transport, retail shopping etc) and \$7.2 million on goods and services that were of a business nature or not for personal consumption. Spectators were the largest source of expenditure in New Zealand at \$64.1 million (79.8% of total expenditure by visiting attendees), followed by FIFA at \$6.5 million (8.1%).

**Table 34: Additional expenditure in New Zealand by visiting FIFA WWC attendees (\$m)**

Source: Post-event surveys of spectators (n=6,438) and volunteers (n=421), FIFA WWC stakeholder surveys and interviews

|                     | Tourism goods and services (\$m) | Non-tourism goods and services (\$m) | TOTAL (\$m)   | Share         |
|---------------------|----------------------------------|--------------------------------------|---------------|---------------|
| FIFA                | \$0.5                            | \$6.0                                | \$6.5         | 8.1%          |
| Teams               | \$4.9                            | \$1.2                                | \$6.1         | 7.6%          |
| Broadcast and media | \$3.5                            | \$0.0                                | \$3.5         | 4.3%          |
| Volunteers          | \$0.1                            | \$0.0                                | \$0.1         | 0.1%          |
| Spectators          | \$64.1                           | \$0.0                                | \$64.1        | 79.8%         |
| <b>TOTAL</b>        | <b>\$73.2</b>                    | <b>\$7.2</b>                         | <b>\$80.4</b> | <b>100.0%</b> |
| Share               | 91.0%                            | 9.0%                                 | 100.0%        |               |





## 5.4 Impact on New Zealand's environment

This section presents indicators of the environmental impact of co-hosting the FIFA WWC including the amount and value of additional carbon emissions produced, and attendee perceptions of environmental performance.

**FIFA had not yet published its carbon audit at the time of writing so the results in this section are best estimates based on available information and may be subject to change.**

### 5.4.1 Carbon emissions attributable to the FIFA WWC

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An unintended consequence of a major event like the FIFA WWC is the production of additional greenhouse gases through the travel, tourism, and operational activity they create. Research was conducted to measure the volume and monetary value of additional greenhouse gases caused by the FIFA WWC so they could be included in the cost-benefit analysis in Section 6.

Carbon dioxide (CO<sub>2</sub>) is the most prevalent greenhouse gas after water vapour and has therefore become the proxy measure for greenhouse gas emissions. However, CO<sub>2</sub> is only one of many greenhouse gases that are emitted when humans undertake certain activities.<sup>29</sup> To consider the emission of other greenhouse gases, scientists have developed a measure called carbon dioxide equivalent, or CO<sub>2</sub>e. CO<sub>2</sub>e allows other greenhouse gas emissions to be expressed in terms of CO<sub>2</sub>, based on their relative global warming potential (GWP) e.g., CO<sub>2</sub> has a GWP of 1 and methane has a GWP of approximately 25.

Some would argue that the cost of greenhouse gas emissions is already fully internalised in the prices paid for goods and services in New Zealand, because there is a market price for carbon established through New Zealand's Emissions Trading Scheme. At the time of writing, the cost of one tonne of carbon was around NZ\$50.<sup>30</sup>

It is widely accepted that NZ\$50 per tonne is insufficient to cover the actual long-term cost of emitting an additional tonne of CO<sub>2</sub>e, otherwise referred to as the Social Cost of Carbon (SCC).<sup>31</sup> Work undertaken by the New Zealand government indicates that the SCC in 2023 was around \$93.<sup>32</sup>

This suggests that each additional tonne of carbon produced by the FIFA WWC imposed \$43 of unpriced detriment on society (the SCC of \$93 less the price paid of \$50). This figure was used to estimate the unpriced cost of additional carbon produced by the FIFA WWC.

It is important to note that the impacts of carbon production are not confined to the geographies in which the carbon is produced, i.e., carbon produced within a city's geographic boundary has an impact beyond that boundary. The analysis therefore focused on estimating the total amount of additional CO<sub>2</sub>e produced by the New Zealand component of the FIFA WWC and allocating it on a pro rata basis to the four Host Cities based on ticket sales.

The volume of additional CO<sub>2</sub>e produced by the FIFA WWC was estimated in two stages:

1. Estimating the gross amount of CO<sub>2</sub>e produced by each attendee group in relation to the FIFA WWC based on various data sources including surveys, interviews, the Ministry for the Environment's (MfE's) emissions factors and general research. The approach involved translating specific event-related activities into relevant units (e.g., person kilometres travelled for transport-related activities, visitor nights for

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<sup>29</sup> Other greenhouse gases are methane, nitrous oxide, and ozone – all of which occur naturally in the atmosphere.

<sup>30</sup> Based on the average price observed between 1 July 2023 and 15 August 2023.

<sup>31</sup> The SCC is an estimate, in dollars, of the economic damages that would result from emitting one additional tonne of carbon dioxide into the atmosphere.

<sup>32</sup> Based on the central case and expressed in 2023-dollar terms.



tourism-related activities, kWh of energy use etc) and then combining these with MfE’s emissions factors (estimates of CO2e produced per unit of various activities) to estimate the total amount of CO2e produced.

2. Estimating the percentage of gross CO2e that can be considered ‘additional’, to avoid attributing emissions to the FIFA WWC that would have been produced anyway. There was no scientific way of doing this so reasonable assumptions were applied.

The results of the analysis show that FIFA WWC attendees produced around 79,411 tonnes of CO2e across four activities:

- Event operations – the emissions created by the activities required to deliver the event.
- Transport to and from New Zealand – the emissions created by the transportation of people and equipment to and from New Zealand.
- Transport within New Zealand – the emissions created by the transportation of people and equipment within New Zealand.
- Other activity – mainly the emissions created by FIFA WWC-related tourism activity, e.g., accommodation, meals, entertainment etc.

Transport to and from New Zealand was the largest source of CO2e due to the emissions caused by long-haul air travel.

Of the 79,411 tonnes of CO2e produced by FIFA WWC attendees, it is estimated that 88% or 69,879 tonnes can be directly attributed to the FIFA WWC. It is assumed that the remaining 12% would have been produced by FIFA WWC attendees anyway through the everyday activities they would have undertaken had they not attended the FIFA WWC e.g., ‘normal’ living and tourism activities.

Applying the unpriced cost of CO2e of \$43 per tonne results in a total cost attributable to the FIFA WWC of \$3 million. This figure is included in the cost-benefit analysis in Section 6. Transport to and from New Zealand was the largest contributor to the \$3 million cost at \$2.58 million, followed by transport within New Zealand at \$0.31 million.

**Table 35: Production of CO2e by FIFA WWC functional areas**

Source: Post-event surveys of spectators (n=6,438) and volunteers (n=421), FIFA WWC stakeholder surveys and interviews, general research

|                      | Tonnes of CO2e produced by FIFA WWC attendees | Share of CO2e that is incremental | Tonnes of CO2e attributable to FIFA WWC | Cost per tonne of CO2e (unpriced) | Cost of CO2e attributable to FIFA WWC (\$m) |
|----------------------|---|-----------------------------------|---|-----------------------------------|---|
| Event operations     | 267   | 100%                              | 267                                     | \$43                              | \$0.01                                      |
| Transport to/from NZ | 60,063  | 100%                              | 60,063                                  | \$43                              | \$2.58                                      |
| Transport within NZ  | 9,557   | 75%                               | 7,168                                   | \$43                              | \$0.31                                      |
| Other                | 9,524   | 25%                               | 2,381                                   | \$43                              | \$0.10                                      |
| <b>TOTAL</b>         | <b>79,411</b>                                 | <b>88%</b>                        | <b>69,879</b>                           | <b>\$43</b>                       | <b>\$3.00</b>                               |



Segmenting carbon emissions by attendee group shows that spectators were the dominant source of carbon emissions. This was mainly due to transport-related carbon emissions.

**Table 36: Production of CO2e by FIFA WWC attendee group**

Source: Post-event surveys of spectators (n=6,438) and volunteers (n=421), FIFA WWC stakeholder surveys and interviews, general research

|                     | Tonnes of CO2e produced by FIFA WWC attendees | Share of CO2e that is incremental | Tonnes of CO2e attributable to FIFA WWC | Cost per tonne of CO2e (unpriced) | Cost of CO2e attributable to FIFA WWC (\$m) |
|---------------------|---|-----------------------------------|---|-----------------------------------|---|
| FIFA                | 1,615   | 86%                               | 1,384                                   | \$43                              | \$0.06                                      |
| Teams               | 3,628   | 83%                               | 3,005                                   | \$43                              | \$0.13                                      |
| Broadcast and media | 2,347   | 90%                               | 2,105                                   | \$43                              | \$0.09                                      |
| Volunteers          | 122   | 63%                               | 77                                      | \$43                              | \$0.00                                      |
| Spectators          | 71,699  | 88%                               | 63,309                                  | \$43                              | \$2.72                                      |
| <b>TOTAL</b>        | <b>79,411</b>                                 | <b>88%</b>                        | <b>69,879</b>                           | <b>\$43</b>                       | <b>\$3.00</b>                               |

#### 5.4.2 Satisfaction with environmental initiatives

Questions were included in the post-event surveys of spectators and volunteers to understand how satisfied respondents were with:

- Waste management initiatives in and around FIFA WWC events.
- Availability of low carbon options for transport to/from FIFA WWC events.
- Sustainability messaging in and around FIFA WWC events.

The results of this research showed that:

- 77% of spectators and 74% of volunteers were satisfied or very satisfied with waste management initiatives in and around FIFA WWC events.
- 61% of spectators and 68% of volunteers were satisfied or very satisfied with the availability of low carbon options for transport to and from FIFA WWC events.
- 57% of spectators and 69% of volunteers were satisfied or very satisfied with the sustainability messaging in and around FIFA WWC events.

**Table 37: Satisfaction with environmental initiatives**

Source: Post-event surveys of spectators (n=6,438) and volunteers (n=421)

| Environmental initiative   | Spectator satisfaction | Volunteer satisfaction |
|--|------------------------|------------------------|
| Waste management initiatives in and around FIFA WWC events               | 77%                    | 74%                    |
| Availability of low carbon options for transport to/from FIFA WWC events | 61%                    | 68%                    |
| Sustainability messaging in and around FIFA WWC events                   | 57%                    | 69%                    |



## 5.5 Media exposure for New Zealand

The FIFA WWC generated a significant amount of positive international media exposure for New Zealand. Determining the value of media exposure is difficult because the true value depends on the long-term outcomes generated by the exposure. The traditional approach to media valuation involves estimating what it would cost to buy the same amount of coverage at retail prices using industry 'rate cards'. Multipliers are often applied to these rates based on the belief that 'earned' media is worth more than 'purchased' media (up to four times according to some practitioners). This approach, known as Equivalent Advertising Value (EAV), is convenient because it can be calculated in a transparent manner, but may not bear any resemblance to the actual outcomes delivered by the exposure because it is based on cost rather than benefit principles.

The media valuation methodology used in this evaluation involved estimating the expected future tourism benefits caused by the media exposure using a conversion-based approach which considered:

- the markets that the media exposure occurred in
- the underlying probability of someone in that market visiting New Zealand (based on observed pre-COVID-19 visitation/population ratios)
- the value of an additional visitor from that market to New Zealand and the Host City (based on MBIE expenditure statistics)
- the extent to which the media coverage showcased New Zealand
- the level of viewer engagement with the content.

This approach is based on sales funnel logic which maps the steps involved in winning a new customer. The diagram below shows the progression from 'awareness' at the top of the funnel through to 'action' at the bottom. In practice the top of the funnel (the number of people made aware of something) is generally much wider than the bottom of the funnel (the number of people who actually do something).

**Figure 9: The sales funnel**

Source: Mailmunch.com



**FIFA had not released its audience estimates for the FIFA WWC at the time of writing. The results in this section are therefore based on the dedicated global audience estimates for the FIFA WWC 2019 in France, inflated by 25%, and will be updated when FIFA releases its dedicated global audience estimates for the FIFA WWC 2023.** The dedicated global audience includes those who watched live coverage, delayed coverage, or highlights of the FIFA WWC on television or through FIFA's digital channels.



The co-hosting arrangement effectively divided the tournament into a New Zealand component and an Australian component. Only the 16 teams that were based in New Zealand for the group phase ended up playing matches in New Zealand i.e., no teams based in Australia travelled to New Zealand for group phase or play-off matches. This had the effect of creating a sub-audience for matches played in New Zealand driven largely by the teams that were based here. A detailed analysis of viewership by market suggests that the sub-audience for matches played in New Zealand was around 598 million unique viewers.

The high quality, visual impact, and excitement of the media content generated by the FIFA WWC is expected to have raised awareness of, and interest in, New Zealand as a place to visit among this audience. This is likely to have the effect of growing visitation to New Zealand in future years. Using the conversion-based model described above, the net benefit of this future visitation to New Zealand is estimated to be \$22.5 million in 2023-dollar terms. This represents the value of additional tourism expenditure in New Zealand in the future caused by the FIFA WWC media exposure less the cost of the resources required to service the extra demand. This figure is included in the cost-benefit analysis in Section 6.

**Table 38: Value of FIFA WWC media exposure to New Zealand**

Source: FIFA, Fresh Info Media Value Calculator

| Market        | Estimated audience (million) | Estimated value of media exposure to New Zealand (\$m) |
|---------------|------------------------------|--|
| New Zealand   | 2.5                          | \$0.0  |
| Australia     | 2.4                          | \$2.3  |
| Asia          | 154.5                        | \$4.5  |
| Americas      | 220.5                        | \$7.5  |
| UK and Europe | 178.6                        | \$8.0  |
| Rest of World | 39.0                         | \$0.1  |
| <b>TOTAL</b>  | <b>597.5</b>                 | <b>\$22.5</b>  |

## 5.6 Avoided future costs for New Zealand

The investment by central and local government agencies in infrastructure to enable or support the FIFA WWC resulted in several planned maintenance projects or developments being brought forward. The full cost of FIFA WWC infrastructure is included in the cost-benefit analysis, so any offsetting benefits (avoided future costs) need to be estimated and included in the analysis. A line-item analysis of the costs incurred by central and local government agencies revealed around \$18.5 million of avoided future costs due to planned maintenance projects or developments being brought forward. The \$18.5 million of avoided future cost is included in the cost-benefit analysis in Section 6.



## 5.7 New Zealand resident non-attendees

Non-attendee benefits are benefits accruing to New Zealand residents who did not attend FIFA WWC, but nevertheless derived value from the event being hosted in New Zealand. The source of this value is personal and therefore difficult to define, but may include:

- enjoying the general atmosphere/vibrancy created by the FIFA WWC
- knowing that people you care about had the ability to attend the FIFA WWC, e.g., family and friends
- deriving a financial benefit from the FIFA WWC, e.g., as the owner of a business directly or indirectly impacted by the event
- seeing familiar people and scenery in the television coverage
- knowing they could attend the event if they wanted to (option value)
- just knowing and appreciating that the FIFA WWC is being held in New Zealand (existence value).

A randomised online survey was conducted of 1,504 New Zealand residents who did not attend the FIFA WWC to learn more about their interest in the FIFA WWC and the importance of it being hosted in New Zealand. The following questions were used to collect this information:

- *Were you aware that New Zealand recently co-hosted the FIFA Women's World Cup 2023 with Australia?*
- *How would you describe your level of interest in the FIFA Women's World Cup 2023?*
- *New Zealand and Australia had to bid against other countries to co-host the FIFA Women's World Cup 2023. How important is it to you that New Zealand was chosen to co-host the FIFA Women's World Cup 2023?*
- *How strongly do you agree with the following statements?*
  - *The FIFA Women's World Cup 2023 has inspired me to increase my participation in football.*
  - *The FIFA Women's World Cup 2023 has increased the visibility of women's sport in New Zealand.*
  - *Hosting events like the FIFA Women's World Cup 2023 increases my pride in New Zealand.*
  - *Hosting events like the FIFA Women's World Cup 2023 makes New Zealand a more enjoyable place to live.*
  - *It is important to continue supporting and showcasing women's sport in New Zealand.*



### 5.7.1 Awareness of the FIFA WWC among non-attendees

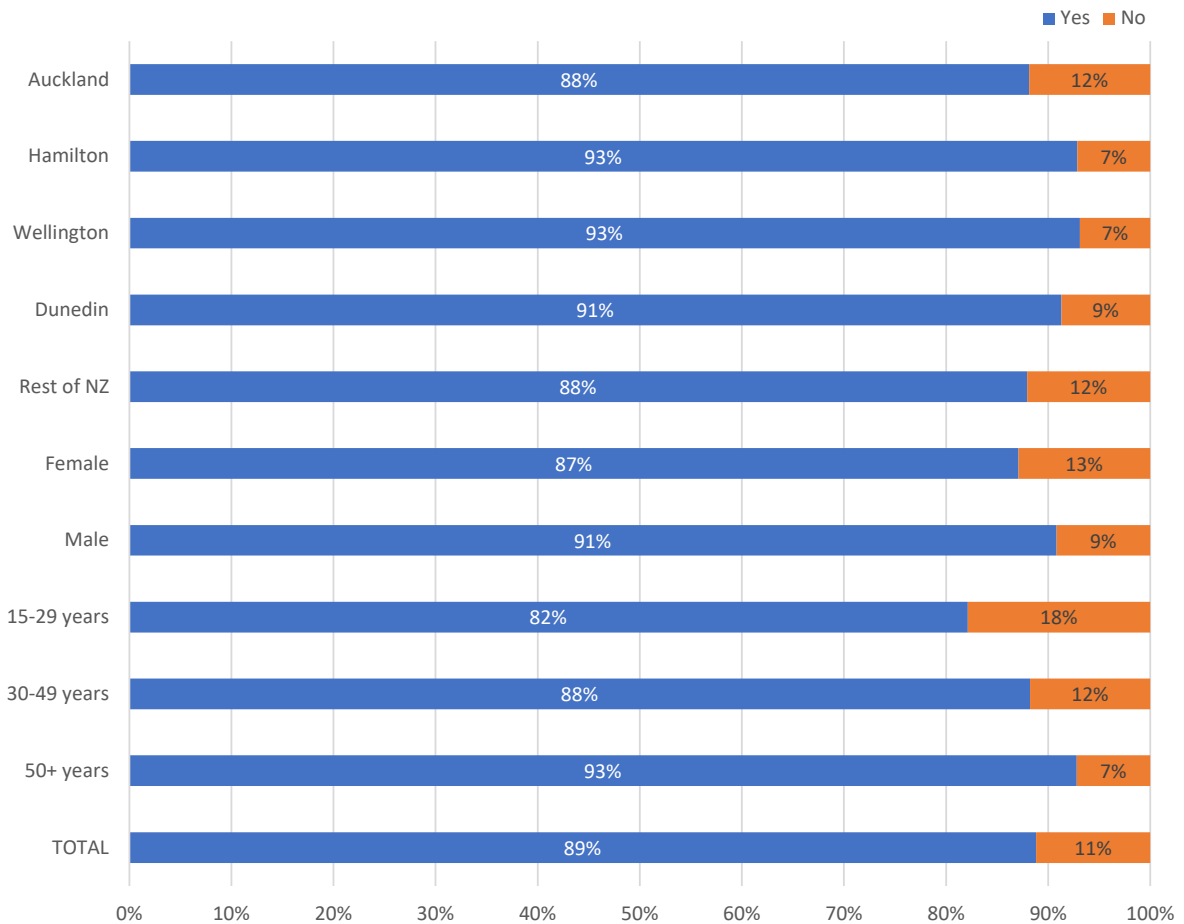
**Research question: Were you aware that New Zealand recently co-hosted the FIFA Women's World Cup 2023 with Australia?**

The results of the non-attendee survey showed that:

- Around 89% of respondents reported being aware that New Zealand recently co-hosted the FIFA WWC with Australia.
- Awareness was highest amongst:
  - Hamilton and Wellington residents (93% awareness)
  - Males (91% awareness)
  - Those aged 50 years or older (93% awareness).

**Figure 10: Awareness of the FIFA WWC among non-attendees**

Source: Post-event survey of FIFA WWC non-attendees (n=1,504)





## 5.7.2 Level of interest in the FIFA WWC among non-attendees

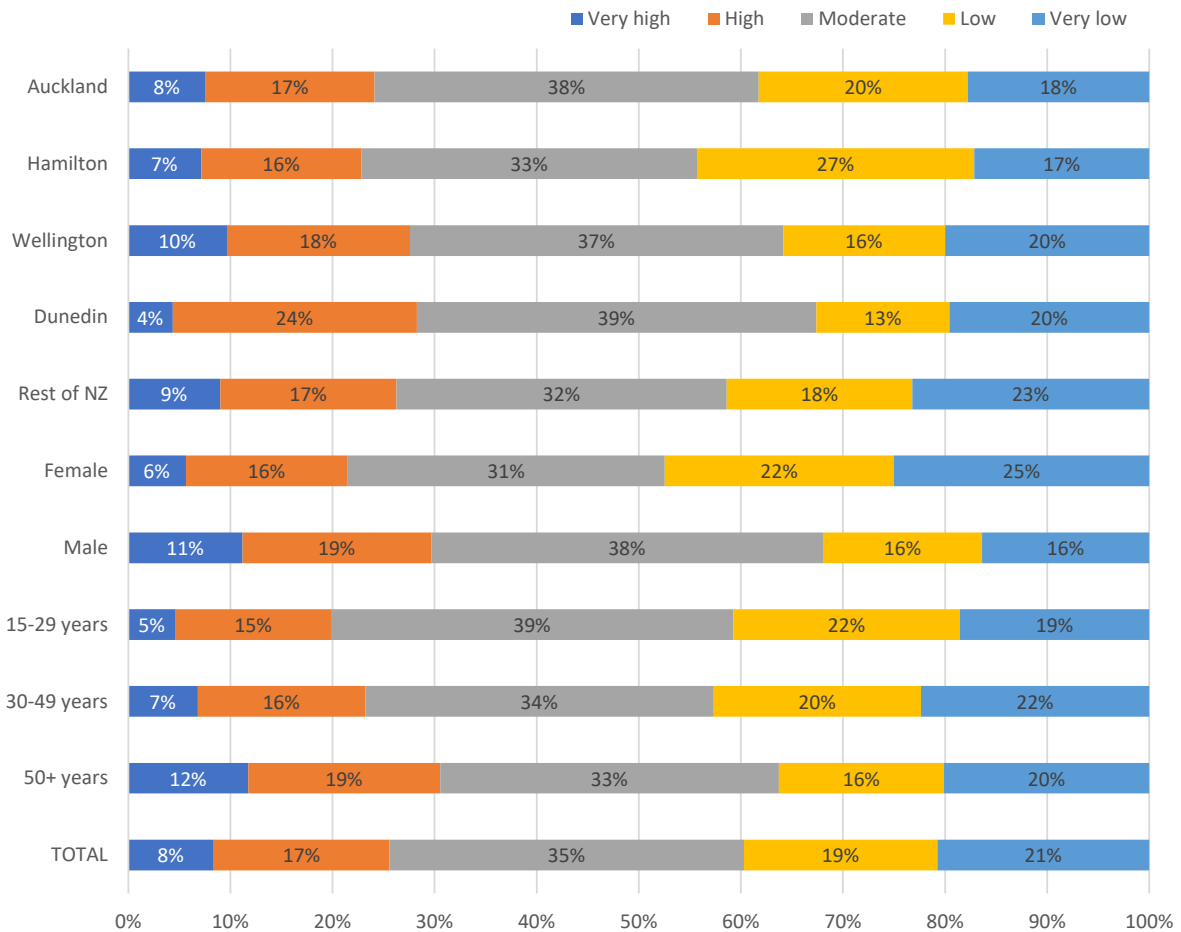
**Research question: How would you describe your level of interest in the FIFA Women's World Cup 2023?**

The results of the non-attendee survey showed that:

- Around 25% of respondents reported having 'high' or 'very high' levels of interest in the FIFA WWC.
- Interest in the FIFA WWC was highest amongst:
  - Dunedin and Wellington residents (28% high or very high levels of interest)
  - Males (30% high or very high levels of interest)
  - Those aged 50 years or older (31% high or very high levels of interest).

**Figure 11: Level of interest in the FIFA WWC among non-attendees**

Source: Post-event survey of FIFA WWC non-attendees (n=1,504)







### 5.7.3 Importance to non-attendees of New Zealand co-hosting the FIFA WWC

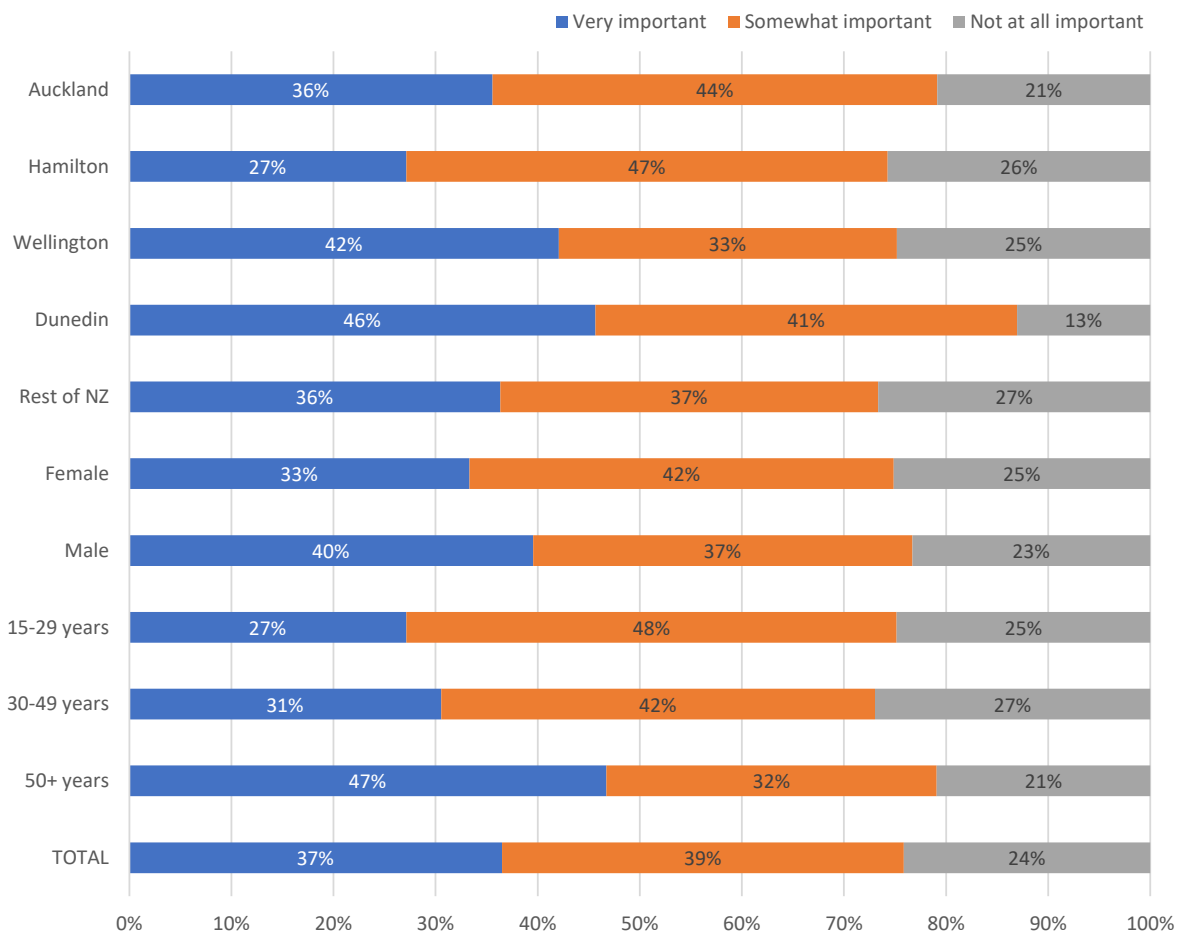
**Research question: New Zealand and Australia had to bid against other countries to co-host the FIFA Women's World Cup 2023. How important is it to you that New Zealand was chosen to co-host the FIFA Women's World Cup 2023?**

The results of the non-attendee survey showed that:

- Around 37% of respondents thought it was 'very important' for New Zealand to co-host the FIFA WWC, 39% thought it was 'somewhat important', and 24% thought that it was not at all important.
- The perceived importance of co-hosting the FIFA WWC in New Zealand was highest amongst:
  - Dunedin residents (87% somewhat important or very important)
  - Males (77% somewhat important or very important)
  - Those aged 50 years or older (79% somewhat important or very important).

**Figure 12: Importance to non-attendees of New Zealand co-hosting the FIFA WWC**

Source: Post-event survey of FIFA WWC non-attendees (n=1,504)





### 5.7.4 Potential impact of co-hosting the FIFA WWC on football participation

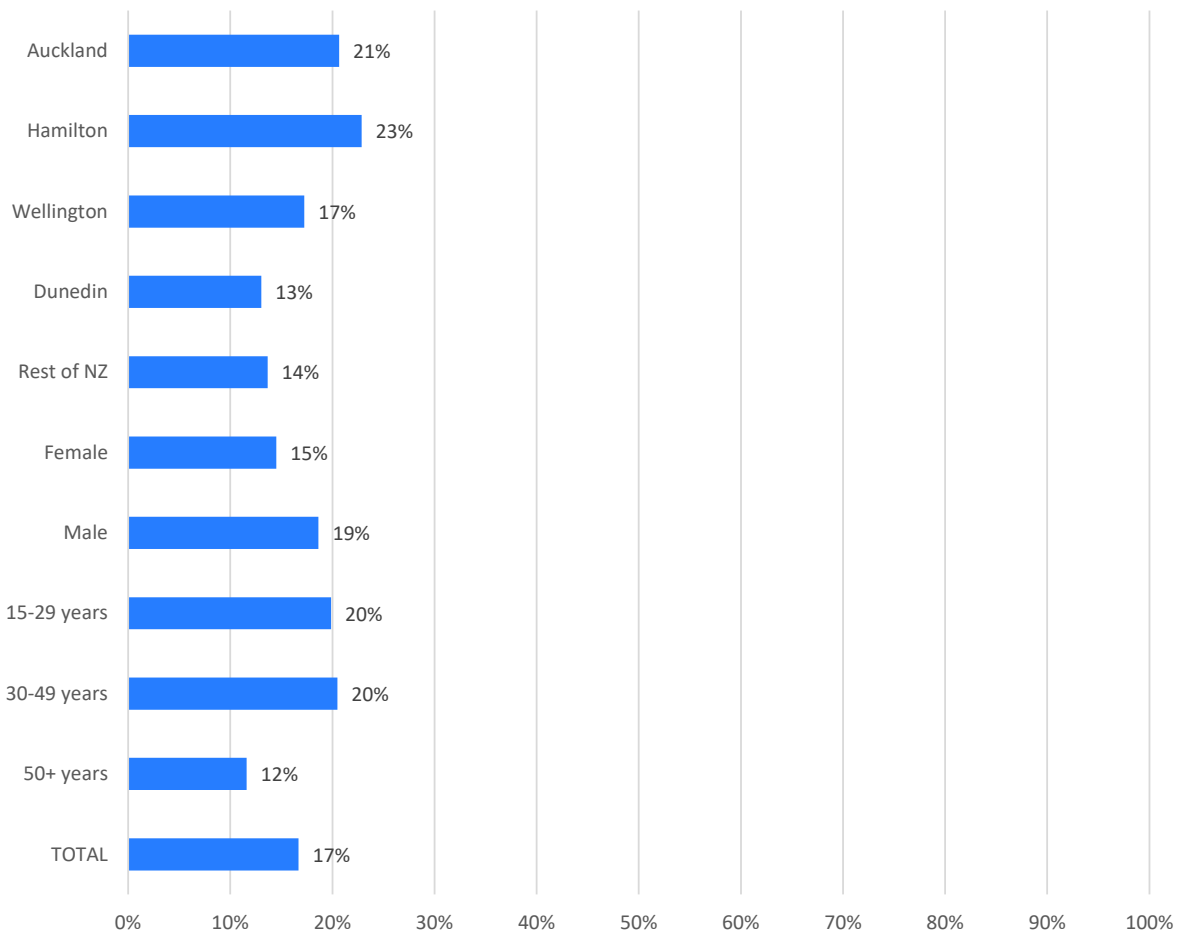
**Research question: How strongly do you agree with the following statement? The FIFA Women's World Cup 2023 has inspired me to increase my participation in football.**

The results of the non-attendee survey showed that:

- Around 17% of respondents agreed or strongly agreed that co-hosting the FIFA WWC in New Zealand had inspired them to increase their participation in football.
- The intention to increase participation in football was highest amongst:
  - Hamilton residents (23% agreed or strongly agreed)
  - Males (19% agreed or strongly agreed)
  - Those under 50 years of age (20% agreed or strongly agreed).

**Figure 13: Share of respondents who agree that the FIFA WWC has inspired them to increase their participation in football**

Source: Post-event survey of FIFA WWC non-attendees (n=1,504)





### 5.7.5 Impact of co-hosting the FIFA WWC on the visibility of women's sport in New Zealand

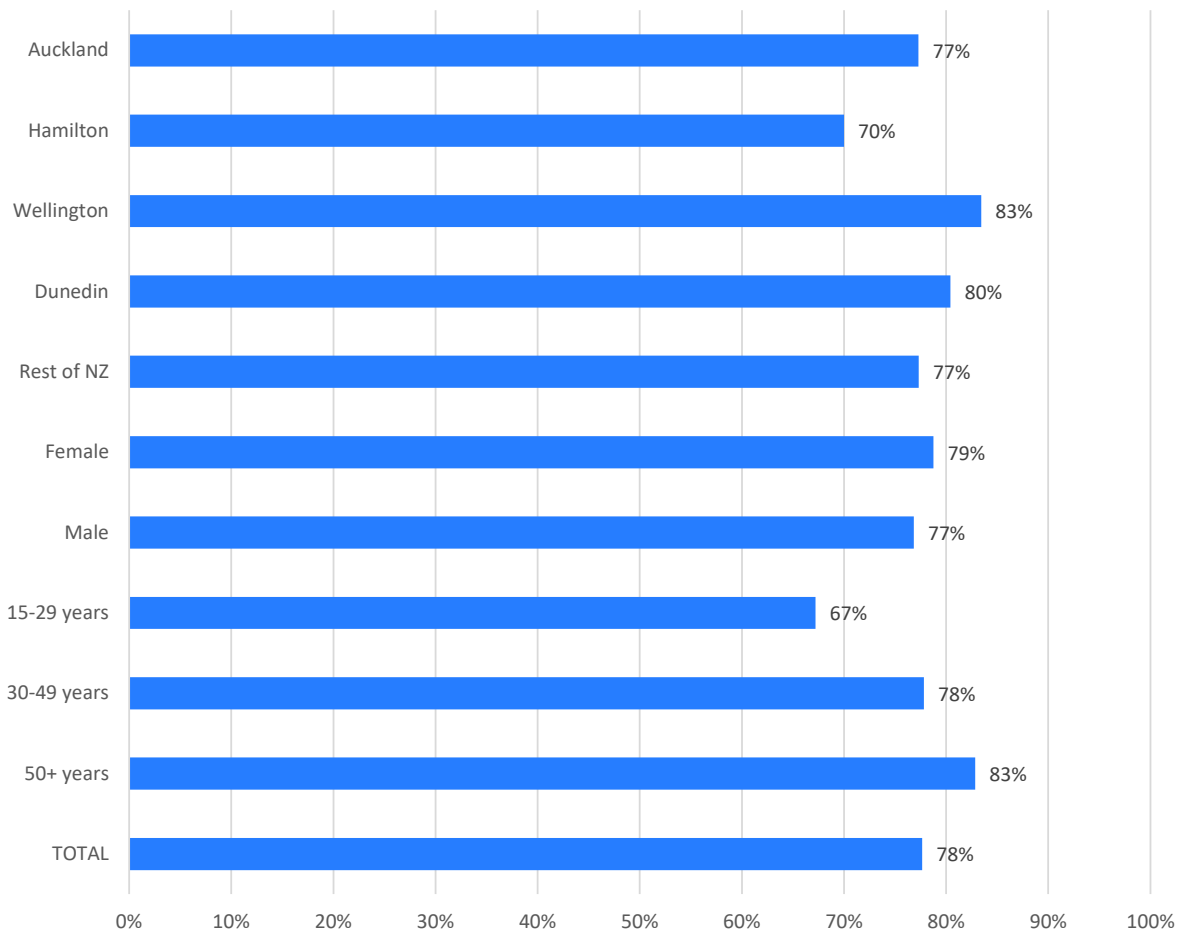
**Research question: How strongly do you agree with the following statement? The FIFA Women's World Cup 2023 has increased the visibility of women's sport in New Zealand.**

The results of the non-attendee survey showed that:

- Around 78% of respondents agreed or strongly agreed that co-hosting the FIFA WWC in New Zealand had increased the visibility of women's sport in New Zealand.
- The perception of increased visibility was highest amongst:
  - Wellington residents (83% agreed or strongly agreed)
  - Females (79% agreed or strongly agreed)
  - Those aged 50 years or older (83% agreed or strongly agreed).

**Figure 14: Share of respondents who agree that the FIFA WWC has increased the visibility of women's sport in New Zealand**

Source: Post-event survey of FIFA WWC non-attendees (n=1,504)





### 5.7.6 Impact of co-hosting the FIFA WWC on national pride

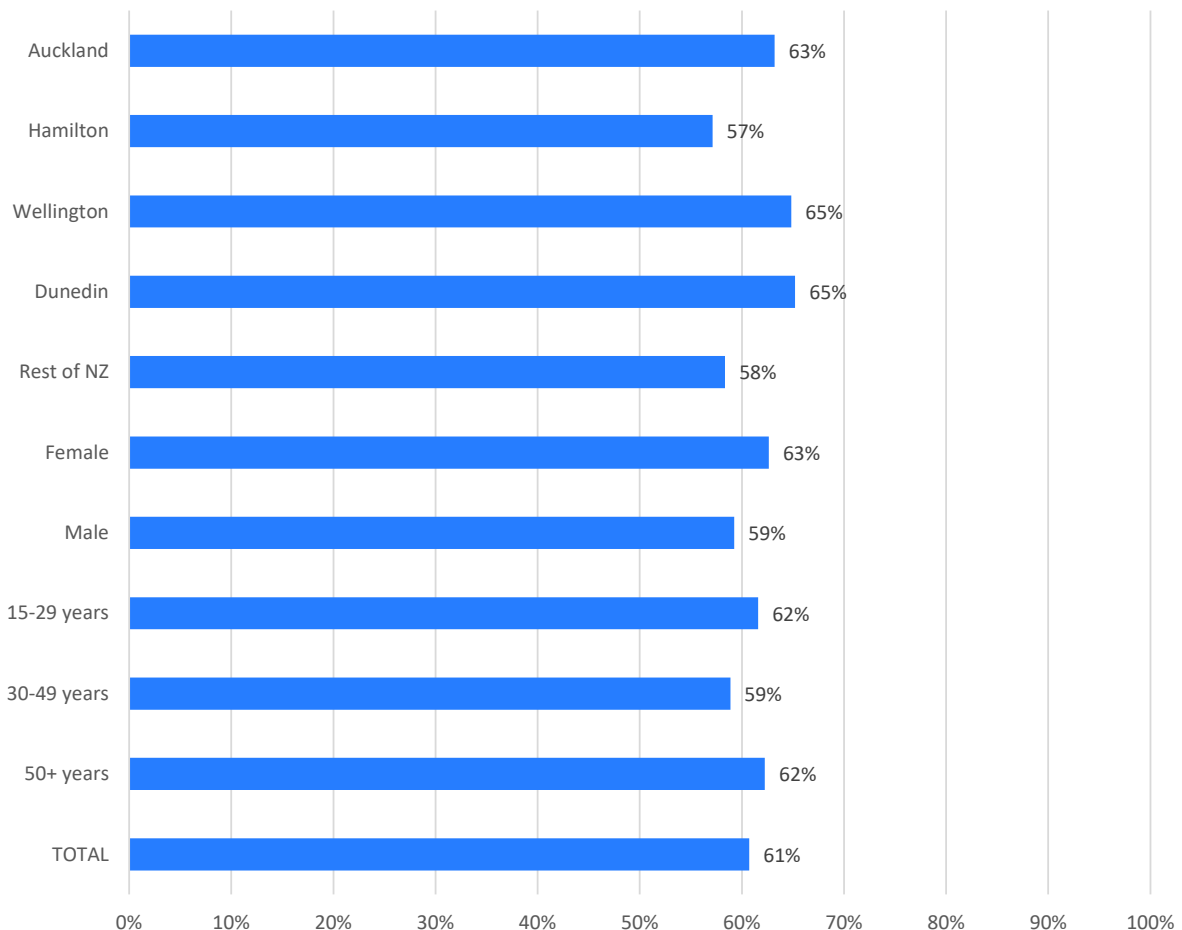
**Research question: How strongly do you agree with the following statement? Hosting events like the FIFA Women's World Cup 2023 increases my pride in New Zealand.**

The results of the non-attendee survey showed that:

- Around 61% of respondents agreed or strongly agreed that co-hosting events like the FIFA WWC in New Zealand increases their pride in New Zealand.
- The increase in national pride was highest amongst:
  - Wellington and Dunedin residents (65% agreed or strongly agreed)
  - Females (63% agreed or strongly agreed)
  - Those aged 15-29 years and 50 years or older (62% agreed or strongly agreed).

**Figure 15: Share of respondents who agree that hosting events like the FIFA WWC increases their pride in New Zealand**

Source: Post-event survey of FIFA WWC non-attendees (n=1,504)





### 5.7.7 Impact of co-hosting the FIFA WWC on liveability

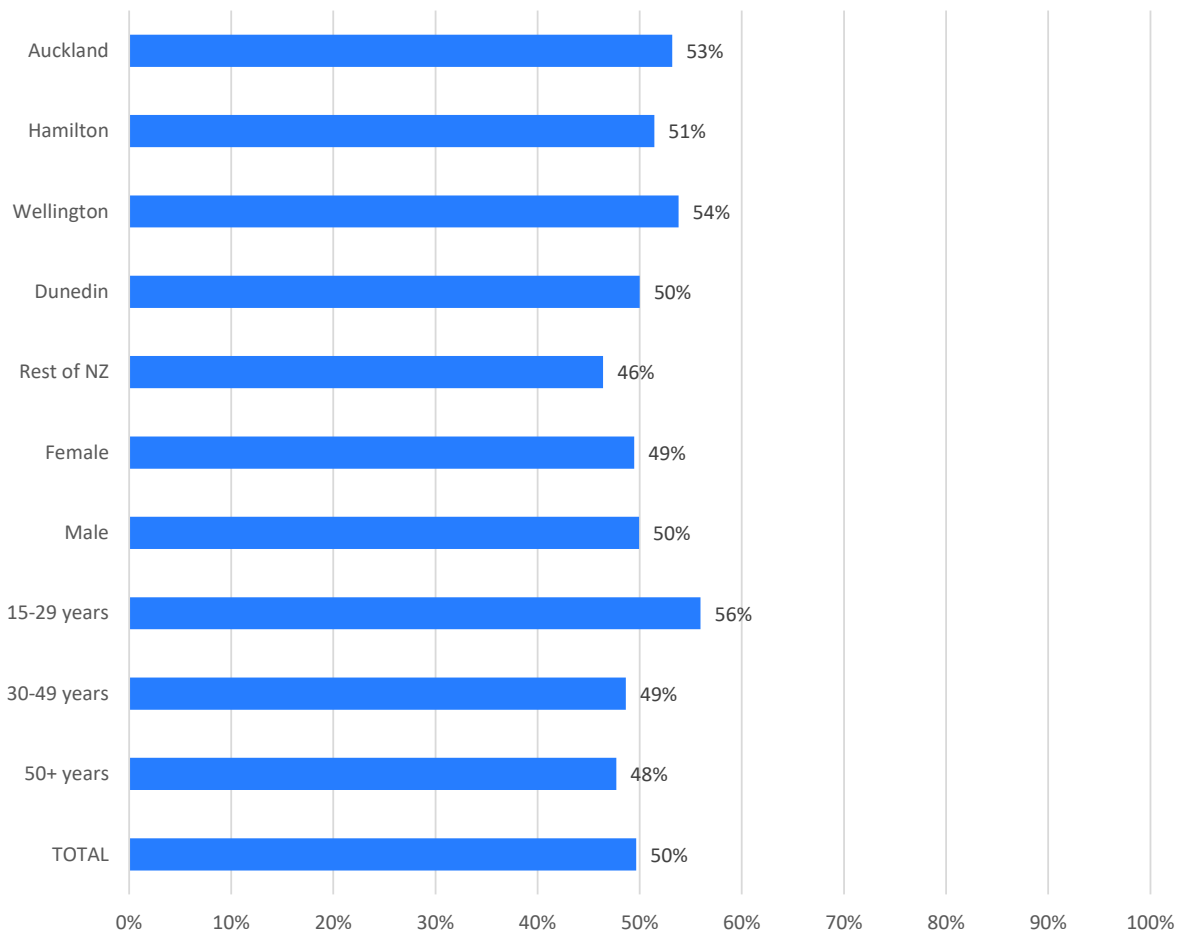
**Research question: How strongly do you agree with the following statement? Hosting events like the FIFA Women's World Cup 2023 makes New Zealand a more enjoyable place to live.**

The results of the non-attendee survey showed that:

- Around 50% of respondents agreed or strongly agreed that co-hosting events the FIFA WWC in New Zealand makes New Zealand a more enjoyable place to live.
- The perceived increase in liveability was highest amongst:
  - Wellington residents (54% agreed or strongly agreed)
  - Males (50% agreed or strongly agreed)
  - Those aged 15-29 years (56% agreed or strongly agreed).

**Figure 16: Share of respondents who agree that hosting events like the FIFA WWC makes New Zealand a more enjoyable place to live**

Source: Post-event survey of FIFA WWC non-attendees (n=1,504)





### 5.7.8 Importance of continuing to support and showcase women's sport in New Zealand

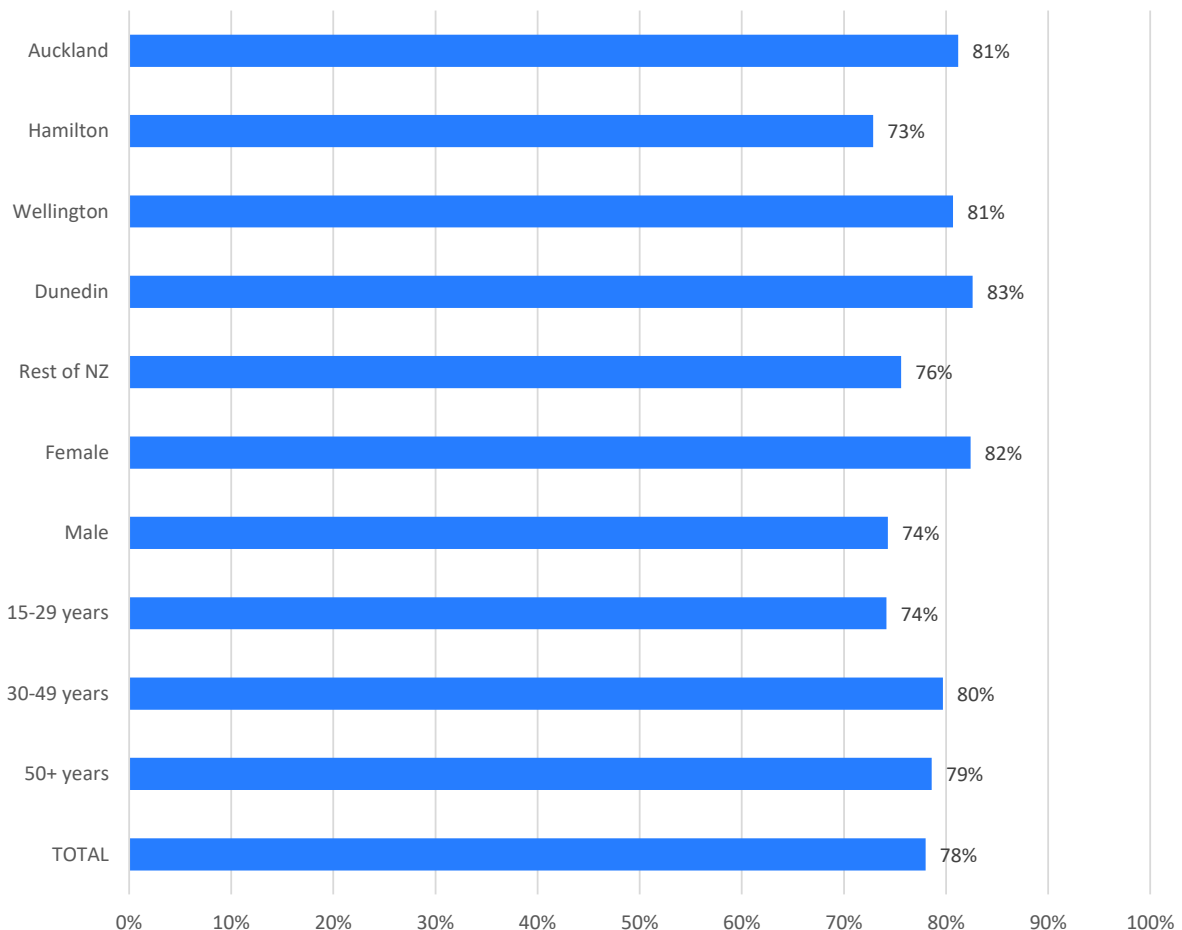
**Research question: How strongly do you agree with the following statement? It is important to continue supporting and showcasing women's sport in New Zealand.**

The results of the non-attendee survey showed that:

- Around 78% of non-attendee respondents agreed or strongly agreed that it is important to continue supporting and showcasing women's sport in New Zealand.
- The perceived importance was highest amongst:
  - Dunedin residents (83% agreed or strongly agreed)
  - Females (82% agreed or strongly agreed)
  - Those aged 30-49 years (80% agreed or strongly agreed).

**Figure 17: Share of non-attendee respondents who agree that it is important to continue supporting and showcasing women's sport in New Zealand**

Source: Post-event survey of FIFA WWC non-attendees (n=1,504)





### 5.7.9 Value to non-attendees

These results indicate that many New Zealand residents who did not attend the FIFA WWC still retained a high level of interest in the event and assigned a reasonable level of importance to New Zealand winning the right to co-host the FIFA WWC with Australia. This provides strong evidence of an underlying value to some New Zealand residents of hosting the FIFA WWC, even though they did not attend the event. The following question was included in the survey of non-attendees to estimate this value:

- *We are interested in understanding how much personal value you gained from the FIFA Women’s World Cup 2023 being co-hosted in New Zealand. This value may have been driven by the opportunity to participate in the event, and/or the feeling of pride you got from knowing it was being co-hosted in New Zealand. Please answer the following question to help us with this. **What is the maximum amount of money you would personally be willing to contribute to host a future FIFA Women’s World Cup event in New Zealand?***

The responses to this question allowed us to estimate the percentage of New Zealand resident non-attendees that would be willing to pay something to host a future FIFA WWC in New Zealand, as well as the average amount of money those people would be willing to pay. Combining these findings with previous results indicates that around 2.16 million New Zealand resident non-attendees would be willing to pay an average of \$36.40<sup>33</sup> each to host a future FIFA WWC in New Zealand, while the remaining 2.74 million non-attendees would be willing to pay nothing. The total non-attendee value for New Zealand residents is therefore estimated to be \$78.6 million (2,158,557 x \$36.40). This figure is included in the cost-benefit analysis in Section 6.

**Table 39: Count of FIFA WWC attendees and non-attendees**

Source: Post-event surveys of spectators (n=6,438) and volunteers (n=421), FIFA WWC stakeholder surveys and interviews, Statistics NZ

|                        | New Zealand residents |
|------------------------|-----------------------|
| FIFA WWC attendees     | 226,270               |
| FIFA WWC non-attendees | 4,897,830             |
| <b>TOTAL</b>           | <b>5,124,100</b>      |

**Table 40: Willingness to pay of NZ resident non-attendees to host a future FIFA WWC in New Zealand**

Source: Post-event survey of FIFA WWC non-attendees (n=1,504)

|  | Number of NZ residents | Average willingness to pay per resident | Total willingness to pay to host a future FIFA WWC event in NZ (\$m) |
|--|------------------------|---|--|
| Willing to pay to host a future FIFA WWC event in NZ     | 2,158,557              | \$36.4                                  | \$78.6   |
| Not willing to pay to host a future FIFA WWC event in NZ | 2,739,273              | \$0.0                                   | \$0.0  |
| <b>TOTAL</b>   | <b>4,897,830</b>       | <b>\$16.0</b>                           | <b>\$78.6</b>  |

<sup>33</sup> This value is 70% of the value derived from survey responses to control for the likely difference between notional and actual willingness to pay.



## 5.8 Cultural outcomes

Having a strong Māori cultural theme running through the FIFA WWC was a shared objective between government, FIFA, LFS New Zealand, Host Cities, and mana whenua. This included all major touchpoints such as stadia, FIFA Fan Festival sites, leverage and legacy activities, and media content delivered to domestic and international audiences.

FIFA had a strong focus on recognising and embracing the unique cultures of the host countries, including examples of mahi that has not been seen before in major events hosted in New Zealand.

### 5.8.1 The first-ever FIFA cultural panel – First Sisters of Country (FSOC)

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In a world first for FIFA, it established an all-wāhine cultural panel to ensure the unique indigenous cultures of both countries were respected throughout all aspects of the FIFA WWC. Named *First Sisters of Country, whānau by sea and sky* it was made up of six women – three wāhine Māori and three First Nations' Australians.

The all-wāhine cultural panel was set up to provide cultural input to ensure First Nations and Tangata Whenua voices informed cultural engagement initiatives and to ensure the tikanga and values of both countries were upheld during the tournament. The panel's role was to provide advice and guidance on a range of kaupapa, i.e., the cultural elements in pre-match ceremonies, team welcomes and the opening and closing ceremonies.

Some of the work the panel supported was the use of traditional place names in tournament communications and te reo Māori in signage. Some of the other clear visual elements the panel influenced during the tournament were the inclusion of First Nations' and Māori flags in stadia, cultural elements in pre-match ceremonies and team welcomes, and a highly visible presence at the opening ceremony.

The panel also provided guidance on other milestone achievements such as creating a bi-national tournament acknowledgement to both Māori and First Nations' communities, joining as members to indigenous-led business networks to encourage FIFA and the tournament to invest in Māori and First Nations' businesses, and several other significant cultural actions.

### 5.8.2 The Draw and Opening Ceremony

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The Draw live show in Auckland on 22 October 2022 included dual indigenous cultural performances that showcased to the world what is culturally important for New Zealand.

On 20 July 2023 New Zealand hosted the opening match and ceremony of the FIFA WWC. The beautiful game, female empowerment and the indigenous cultures of the co-hosts were the dominant themes in the official Opening Ceremony at Auckland's Eden Park. Commencing with pōwhiri, firstly to co-hosts Australia, then also to the competing nations, the ceremony then began with a video in which the story of Maui was portrayed on the screen acknowledging New Zealand and its people.

The cast included 240 local performers and more than 45 Māori and First Nations' performers were involved in the production. After the Opening Ceremony, the news headlines around the world pointed to the celebration of indigenous cultures.





### 5.8.3 Other examples of celebrating Māori culture

Other examples where aspects of Māori and First Nations' culture were incorporated include:

- **The brand design:** Māori and First Nations' design elements were incorporated into the branding and FIFA worked with a Māori weaver from Ngāti Porou to develop the taniko element into the brand.
- **The brand launch:** when FIFA launched its tournament brand, the first kupu or words heard in the launch video were in te reo Māori.
- **Bilingual place names:** this was followed by the use of bilingual place names for the Host Cities, which was a first for FIFA and continued throughout online content, broadcasts, and signage.
- **Pōwhiri:** or traditional welcoming ceremonies were held for FIFA officials during site visits and inspection tours in the early planning stages, as well as for teams and officials on arrival for the FIFA WWC.
- **Te reo Māori signage** was included in stadia and used alongside English to refer to place names.
- The use of **te reo and bilingual signage** was also adopted outside of stadia and by the Host Cities e.g., in wayfinding signage and te reo announcements in railway stations and on other public transport.
- FIFA agreed to **fly indigenous flags in stadia**, which was unprecedented for FIFA tournaments. It was also significant for New Zealand, as the Tino Rangatiratanga flag has not been used at any other World Cups over the last decade.

### 5.8.4 Effectiveness of cultural initiatives

To evaluate the effectiveness of these cultural initiatives, questions were included in the post-event surveys of spectators and volunteers to determine whether respondents felt there was a strong Māori cultural theme within the event. The survey results showed that 72% of spectators and 76% of volunteers felt there was a strong Māori cultural theme running through the event.

**Table 41: Awareness of Māori cultural themes within the event**

Source: Post-event surveys of spectators (n=6,438) and volunteers (n=421)

|   | Spectators | Volunteers |
|---|------------|------------|
| Share of respondents who felt there was a strong Māori cultural theme within the FIFA WWC event | 72%        | 76%        |

## 5.9 Legacy benefits for New Zealand of hosting the FIFA WWC

Legacy benefits are long-term benefits that extend well beyond the event period. The legacy of co-hosting the FIFA WWC was an important consideration for central and local government stakeholders during the due diligence, bidding, and planning phases.

To maximise the benefits of co-hosting the FIFA WWC, MBIE worked closely with other government organisations, New Zealand Football, Host Cities, and mana whenua to develop a leverage and legacy programme that focussed on delivering tangible benefits in the areas of education, sport, tourism, international relations, communities, business, health, arts and culture, and conservation. The initiatives in the programme aimed to champion equality for women and girls, engage communities, and share New Zealand's culture, stories, and brand with a large global audience. More than 50 projects were delivered in New Zealand and overseas across four key focus areas:



- Mana Wāhine – raising the profile of women and girls in sport and wider society
- Te Tangata – thriving communities
- Te Ao – enhancing our international reputation and relationships
- Ōhanga – economic prosperity.

Host Cities, Team Base Cities, FIFA, and New Zealand Football all delivered legacy programmes of their own, some components independently and others in partnership with other FIFA WWC stakeholders.

Some of the legacy benefits of co-hosting the FIFA WWC are immediately visible and highly certain, such as the upgrades to stadia and sports facilities and new public artworks around the country, while others are less visible (e.g., changes in perceptions regarding women’s sport) or certain (e.g., changes in football participation rates).

Discussions with key FIFA WWC stakeholders including government (MBIE as the lead agency for the FIFA WWC and other agencies as required), FIFA, Sport NZ, New Zealand Football, and the Host Cities have identified a range of actual or expected legacy benefits that can be organised under the following headings:

- Visibility and perception of women’s sport in New Zealand
- Infrastructure outcomes
- Football outcomes
- Celebrating New Zealand and its unique culture on the world stage
- Education and training outcomes
- Other community engagement outcomes
- Event delivery capability
- Research capability.

The specific actual or expected legacy benefits are described below.

### [5.9.1 Visibility and perception of women’s sport in New Zealand](#)

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A key government objective of co-hosting the FIFA WWC was “increasing the visibility of, and value placed on, women in sport and wider society”.<sup>34</sup> As part of the government’s *Women and Girls in Sport and Active Recreation Strategy*, Sport NZ partnered with the sport sector to run a series of projects designed to build participation, leadership, value, and visibility across women’s sport in the years leading up to the FIFA WWC.

For the FIFA WWC itself, many of these projects were focused on raising the value and visibility of women’s sport in New Zealand, including the *It’s Time* campaign. Evidence from post-event surveys of FIFA WWC spectators, volunteers, and non-attendees indicates that this objective was achieved:

- 98% of spectators, 99% of volunteers, and 78% of non-attendees felt that the FIFA WWC increased the visibility of women’s sport in New Zealand (Figure 18).
- 87% of spectators and 90% of volunteers felt that the FIFA WWC had improved their understanding and appreciation of women’s sport (Figure 19).

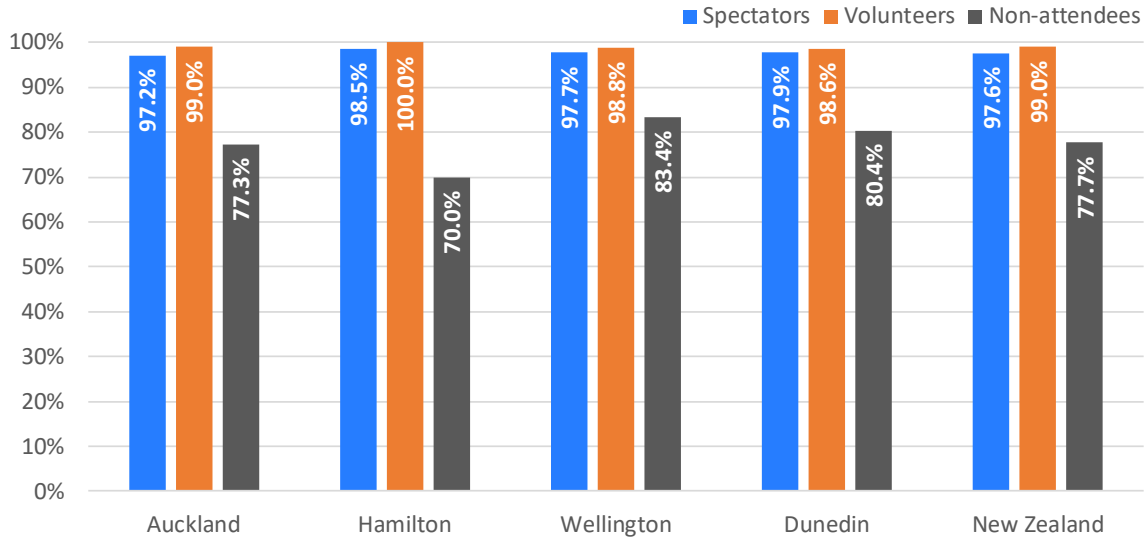
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<sup>34</sup> Puawānanga Crown Outcomes Framework, Maximising the impacts and benefits of the FIFA WWC for Aotearoa New Zealand.



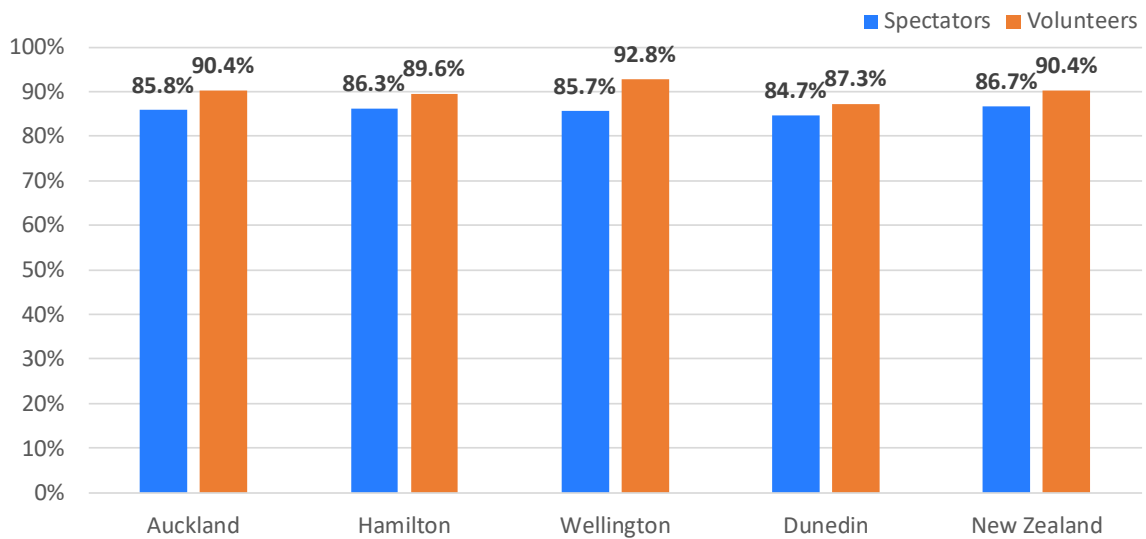
**Figure 18: Share of respondents who agreed or strongly agreed that “the FIFA WWC has increased the visibility of women’s sport in New Zealand”**

Source: Post-event surveys of spectators (n=6,438) volunteers (n=421), and non-attendees (n=1,504)



**Figure 19: Share of respondents who agreed or strongly agreed that “the FIFA WWC has improved my understanding and appreciation of women’s sport”**

Source: Post-event surveys of spectators (n=6,438), volunteers (n=421), and non-attendees (n=1,504)



Independent research conducted by Sport NZ as part of the *It's Time* campaign (2023 Women's Sporting Landscape) also found evidence of greater public awareness, interest, and engagement in women's sport following New Zealand's co-hosting of the FIFA WWC.

Sport NZ conducted baseline research in June 2022 which showed that awareness of female athletes was significantly lower than comparable male athletes, particularly in team sports. It also showed that the more visible female athletes were, the more New Zealanders were likely to know them by name, follow their journeys and become fans.



The research was repeated in August 2023 to understand how sentiment has changed since June 2022. This year's research shows that viewership of women's sport has grown by 29%, with the Rugby and Football World Cups generating significant interest for each sport, national team, and athletes.

Other key findings include:

- 45% of existing sports fans are watching women's sport, up from 35% in 2022.
- The marketability of female athletes and teams has risen by 21%, driven by increased awareness.
- 87% of New Zealanders heard or saw something about the FIFA WWC, with nearly 60% watching a game during the tournament.
- Following the FIFA WWC, over half of New Zealand indicated they were more interested in women's football.
- 50% of New Zealanders said they had recently advocated for or encouraged others to watch women's sport, up from 38% in 2022.
- Significantly more New Zealanders perceive women's sport as exciting (27% up from 21%) and having a positive influence on society (36% up from 31%).
- Three women's national teams are now in the top 5 for popularity (up from only one in 2022).

The infographic that Sport NZ released with this research is provided in Appendix 2.

A separate media and gender study<sup>35</sup> conducted by Sport NZ found that “the FIFA Women's World Cup 2023 has had the highest impact on gender balance since the beginning of this study with coverage of women's sport accounting for 45.5% of all sport news coverage during the tournament period”.

It is important to note that the FIFA WWC was the third of three women's world cup events hosted in New Zealand in an 18-month period, following the successful delivery of the 2022 ICC Women's Cricket World Cup in March and April 2022<sup>36</sup> and Rugby World Cup 2021 (played in 2022) in October and November 2022<sup>37</sup>. Hosting these three events in quick succession was a deliberate strategy to elevate women's sport in New Zealand and provide a platform for gender equality in sport and society more generally. While the results in this evaluation relate primarily to the FIFA WWC, they are likely to be influenced by the successful delivery of previous women's world cup events and other gender equality initiatives in New Zealand.

The long-term legacy of the visibility and perception impacts created by the FIFA WWC and the women's Cricket and Rugby World Cups in 2022 will depend on the extent to which they are leveraged and built upon, but are likely to include:

- greater respect for women's sport, and women generally;
- improved attitudes towards women's sport at all levels of competition;
- more resources being directed towards women's sport by government agencies and national sports organisations;
- women's sport becoming a stronger proposition for media, broadcasters, and commercial sponsors; and
- higher levels of participation in women's sport, leading to better social, cultural, and health outcomes for women.

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<sup>35</sup> Media and Gender Study – FIFA Women's World Cup Case Study (December 2023).

<sup>36</sup> Originally scheduled for February/March 2021 but moved to March/April 2022 due to COVID-19.

<sup>37</sup> Originally scheduled for October/November 2021 but moved to October/November 2022 due to COVID-19.



## 5.9.2 Infrastructure outcomes

Significant investments were made in stadia and football club infrastructure across New Zealand to comply with FIFA’s requirements, as described below.

### Stadia upgrades

The four stadia used for the FIFA WWC required significant upgrades to meet the needs of female athletes and comply with Sport NZ and FIFA requirements. These upgrades were funded through a mix of venue budgets, local and regional investment, and central government investment.

One significant area of investment was the installation of new LED lights at Eden Park in Auckland, FMG Stadium in Hamilton, and Sky Stadium in Wellington. The modern, high-specification LED systems provide better illumination and uniformity than the previous lights, and greater energy efficiency. The new lights at these stadia will improve the experience of future players, spectators, and broadcast audiences.

Another significant area of investment was the development of gender-equal facilities at each stadia including cubicle showers, privacy screens, cubicle toilets, baby-change tables, and accessible bathrooms. This investment built on the legacy of previous gender-equal investments for the 2022 women’s Cricket and Rugby World Cups.

In addition to lighting upgrades and gender-equal facilities, each stadium had a programme of work to upgrade systems relating to turf management, energy efficiency, access control, stadium management, IT, turnstiles, and other required infrastructure. All four New Zealand stadia also achieved green building certification as part of FIFA WWC readiness (two achieved 2-Green Star standard and two achieved 3-Green Star standard). In practical terms certification will enhance operational sustainability, reduce energy and water use, and deliver efficiencies in other areas including waste management and recycling.

These upgrades support the continued evolution of each venue, the services levels they can provide to users and guests, and the long-term viability of hosting major events in New Zealand.

**Table 42 Match venues benefitting from infrastructure upgrades due to the FIFA WWC**

Source: MBIE, Sport NZ

| Host City  | Stadium                                   |
|------------|---|
| Auckland   | Eden Park                                 |
| Hamilton   | Waikato Stadium (FMG Stadium)             |
| Wellington | Wellington Regional Stadium (Sky Stadium) |
| Dunedin    | Dunedin Stadium (Forsyth Barr Stadium)    |

### Training Grounds and Community Facilities

In total, 30 stadia and venues were upgraded as a result of the FIFA WWC. Training grounds and community facilities were also upgraded in Host Cities and Team-Base Camp cities to meet FIFA’s requirements. This included improvements to playing surfaces, lighting, training facilities and clubrooms, and gender-neutral upgrades to changing rooms. Many of these changes will be long-lived, resulting in better facilities for communities, football clubs and other sporting codes, and safer and more appropriate environments for women. The facilities in the table below benefitted from the FIFA WWC upgrades.



**Table 43: Training grounds and community facilities benefitting from infrastructure upgrades due to the FIFA WWC**

Source: MBIE, Sport NZ

| City             | Facility   |
|------------------|--|
| Auckland         | North Harbour Stadium<br>The Trusts Arena<br>Shepherds Park<br>Keith Hay Park<br>Bay City Park<br>Fred Taylor Park<br>Michaels Avenue Reserve<br>Seddon Fields<br>Olympic Park<br>Māngere Centre Park<br>McLennan Park |
| Hamilton         | Porritt Park<br>Gower Park<br>Korikori Park  |
| Tauranga         | Bay Oval   |
| Napier           | McClellan Park (gender neutral upgrades only)  |
| Palmerston North | Massey University  |
| Wellington       | Martin Luckie Park<br>Newtown Park<br>Porirua Park   |
| Christchurch     | Orangetheory Stadium<br>Avonhead Park<br>Ngā Puna Wai  |
| Dunedin          | Caledonian Sportsground<br>Tahuna Park<br>University #6  |

### 5.9.3 Football outcomes

Co-hosting the FIFA WWC not only showcased women's football in New Zealand, but football more generally. Matches were attended or watched on television by a large, diverse, engaged, and highly satisfied audience. Among other things, the enjoyment and goodwill surrounding the FIFA WWC has resulted in greater awareness of, and interest in, football in New Zealand.

Attendance records were broken in New Zealand multiple times, firstly at the opening match between the Football Ferns and Norway which at 42,137 set a new record for a men's or women's football match, and finally at the semi-final between Spain and Sweden which drew a crowd of 43,217.

The results of the non-attendee survey (n=1,504) indicate that 17% of respondents reported being inspired by the FIFA WWC to increase their participation in football. While actual changes in participation are likely to be lower than intended changes (not all intentions come to fruition), it is likely that the changes in awareness and perception created by the FIFA WWC will have long-term benefits for football in New Zealand at social, club, and high-performance levels for both women and men.



Early evidence of these benefits will not be available until mid-2024 when registrations for the 2024 club season are complete. Regular monitoring thereafter will determine the extent to which co-hosting the FIFA WWC has caused a step-change in the number and composition of people playing football in New Zealand, as well as their experience within clubs and the wider football community to keep them involved in the game.

#### 5.9.4 Celebrating New Zealand and its unique culture on the world stage

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Co-hosting the FIFA WWC gave New Zealand an opportunity to showcase its culture, stories, and brand to a large global audience. The extensive leverage and legacy programme that was wrapped around the tournament extended New Zealand's reach well beyond the football pitch to showcase our unique culture and tell the New Zealand story; promote New Zealand as a tourism destination; celebrate our leadership in gender equality and women's sport; and use sport diplomacy to improve our international trade relationships.

##### **Showcasing our unique culture and telling the New Zealand story**

Māori culture was integrated, celebrated, and showcased throughout the tournament, as well as through the wider activities and programmes. Kicking off in October 2022, Ngāti Whātua Ōrākei formally welcomed FIFA, the teams, officials, football legends, sponsors, media, and the tournament to Auckland and New Zealand with a large-scale pōwhiri in central Auckland ahead of the official tournament Draw.

Other projects that celebrated Māori culture included Poi Tukua, a series of national projects in partnership with iwi, FIFA, and Host Cities. Poi Tukua aimed to empower fans to celebrate women in sport, express pride for Māori culture, and welcome visitors to New Zealand. Poi were embraced by spectators in stadia and FIFA Fan Festivals, and through international media attention teams, media, broadcasters, international and domestic fans were educated about poi. Poi is now becoming an integral part of the way Kiwis celebrate women's sport.

In addition, iwi-led programmes that supported a wide range of outcomes relevant to local communities were delivered around the country, ranging from campaigns and billboards celebrating local wāhine toa and symposia on female empowerment and leadership, to waka workshops and experiences for visitors and a conference on Māori cultural tourism.

##### **Promoting New Zealand as a tourism destination**

In addition to attracting nearly 27,000 international visitors to New Zealand, the FIFA WWC provided a valuable platform to showcase our natural landscapes, people, and culture to a large global audience, ultimately growing brand desire for New Zealand.

Tourism New Zealand identified key moments in the lead up to, and during, the FIFA WWC to implement promotional activity. To ignite excitement for New Zealand through global coverage of the Draw in October 2022, content was shot at Eden Park to capture the welcome to incoming teams and guests for the tournament. The wero, or laying down of the taki within the pōwhiri, represented an invitation to the teams that were drawn to play their group matches in New Zealand. The welcome content was customised and extended to individual teams and received just under 1 million total video views and delivered 1.2 million total impressions.

In June 2023, to mark one-month to the tournament kick-off, Tourism New Zealand launched its Beautiful Game campaign. The campaign involved two teams of local schoolgirls playing football on a sustainably created, full-sized football pitch, set amongst the awe-inspiring backdrop of Aoraki Mount Cook National Park. This was broadcast around the world and the content received over 700 articles of media coverage.



The Tourism New Zealand insights team reports that there has been a lift in those who are interested in travelling to New Zealand for a live sporting event, and a rise in global appeal from July through October 2023. Whilst not wholly attributable to the FIFA WWC, these results indicate that the FIFA WWC has played a part in raising the profile of New Zealand as an international visitor destination.

### **Celebrating our leadership in gender equality**

To highlight New Zealand's role as a global leader and champion in gender equality, women around the country were celebrated and empowered through symposia, speaker events and panel discussions, online campaigns, digital billboards, exhibitions, and artworks. As an example, more than 7,000 people attended one of the EQUALIZE gender-equality speaker sessions around the country which featured 52 exceptional women, inspiring future generations and reaching millions on social media. All sessions are now available on YouTube and some are available on CNN.

*Wāhine Firsts* celebrated the Kiwi women who have achieved world firsts, leaving an enduring legacy from the tournament in an online exhibition. Also in the online space, a new history of women's football in New Zealand was created and is now available as a resource for schools and the public on Te Ara, the Encyclopaedia of New Zealand and the NZHistory website. A number of new public artworks around the country celebrated Kiwi women. One example was the creation of six large-scale permanent outdoor murals celebrating Māori and Pasifika Football Ferns and indigenous leaders by internationally renowned artist Mr G (Graham Hoete) and young female artists as part of Tūmanako 2.0, leaving a visible and inspiring legacy in the Host Cities.

### **Diplomacy and trade outcomes**

Offshore engagements, activations, events, and delegations were delivered around the world to raise the profile of both the FIFA WWC and New Zealand in key markets. The Ministry of Foreign Affairs and Trade, and other international posts, delivered 49 events in 26 countries. These events attracted more than 9,000 attendees including diplomats, government officials, businesses, journalists, academics, politicians, and members of the public. These events used sport diplomacy to promote New Zealand's values; raise awareness of New Zealand's role as a leader in gender equality; highlight a commitment to te ao Māori and New Zealand's unique culture on the world stage; and support and promote business, tourism, and trade initiatives around the world. Collectively, these projects and events have helped to enhance New Zealand's international reputation, profile, and connections.

One example from New Zealand Trade and Enterprise is the first-ever all-female trade delegation that went to Australia during the tournament, with 28 female-led businesses given the opportunity to build international connections, learn about the Australian business and export environment, and lay a robust foundation for ongoing growth. These female delegates and business owners will also participate in a sustainable business programme in 2024.

### **5.9.5 Educational and training outcomes**

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More than 100,000 students and young people around the country had the opportunity to participate in leverage and legacy and community engagement activations that were delivered for the FIFA WWC. The aim was to deliver programmes that would have a transformative impact on the lives of young people with a particular focus on young women and girls.

Through ongoing education programmes like Kōtuitui, led by New Zealand Football and Sport NZ, more than 30,000 students have so far had the opportunity to learn about different cultures and social sciences through the global lens of football.





The programmes aimed to build the confidence of young women and girls by growing leadership, resilience, and collaboration skills. A partnership between GirlBoss NZ and the Ministry of Education (GirlBoss Make Your Move) engaged thousands of young women around the country, opening up new potential career pathways and encouraging young women to explore careers in sports science, psychology, advanced medicine, surgery, and related fields. The Tertiary Education Commission also connected primary and intermediate school students with sports role models to educate them about future career pathways and work possibilities.

More than \$1 million was invested in hundreds of community-led initiatives aimed at improving access to sport, active recreation and wellbeing for women and girls who may face barriers, with part of the funding directed towards Pasifika women, girls, and communities.

### 5.9.6 Other community engagement outcomes

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In addition to the engagement outcomes outlined above, the government's leverage and legacy programme had important community engagement objectives including connecting people to and getting them excited about the tournament, ensuring teams and their communities felt safe and welcome, and bringing people together to build community, enhance wellbeing, and protect the environment. Some of the activations to connect community groups with the tournament included:

- EyesOnNZ – used a website and social media channels to raise the profile of the tournament, tell New Zealand's stories to the world, and provide a one-stop shop for all FIFA WWC events in New Zealand.
- Poi Tukua – following the successful use of poi at Rugby World Cup 2021 (played in 2022) and the Women's Cricket World Cup 2022, the objective of this programme was to cement poi as an international symbol of empowerment and support for women. Poi workshops were held around the country that allowed residents and visitors to learn about poi and make their own, and poi were made freely available to spectators at all matches. The twirling of poi at stadia and FIFA Fan Festivals was a unique point of difference that fans used to celebrate the female athletes and Māori culture.
- The Greatest Goal – an initiative that encouraged domestic and international football fans to donate native trees to New Zealand. The campaign to promote the project helped to raise the visibility of women in sport and resulted in more than 56,000 native trees being planted across New Zealand, leaving a positive legacy for our natural environment.
- FIFA Fan Festivals – each Host City created a vibrant destination in a central location called the FIFA Fan Festival that fans could visit free-of-charge. All FIFA Fan Festivals had big screens to watch matches on, as well as providing live entertainment, food and beverage, activities, and local cultural experiences. Around 170,000 fans visits were recorded across the four FIFA Fan Festivals between 20 July and 20 August.

These activations successfully expanded the reach and accessibility of the FIFA WWC for New Zealand residents, as well as providing a warm welcome and unique cultural experiences for international visitors. The level of engagement New Zealanders has with the FIFA WWC exceeded all expectations, with nearly 60% of the population watching a match in a stadium or on television.

### 5.9.7 Event delivery capability

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Every major event delivered in New Zealand improves its professional capacity and capability, making it easier to win and deliver future major events. This progression is evident within the FIFA events New Zealand has hosted – the Men's U17 World Cup in 1999, the Women's U17 World Cup in 2008, the Men's U20 World Cup in 2015 and the FIFA WWC in 2023. Bidding for the FIFA WWC was a legacy aspiration following New Zealand's successful hosting of the FIFA Women's U17 World Cup.



Co-hosting the FIFA WWC was arguably the largest and most complex sports event ever hosted in New Zealand. The New Zealand component of the event was largely planned and delivered by New Zealanders, many of whom were drawing on their previous major event experience (FIFA events, Rugby World Cup 2021 (played in 2022), Women's Cricket World Cup 2022, 36<sup>th</sup> Americas Cup in 2021, World Masters Games 2017, Rugby World Cup 2011), but also being exposed to new systems and processes that could be applied to future events.

The knowledge and experience gained from hosting the FIFA WWC will enhance New Zealand's major event capacity and capability, and the success of the event will enhance New Zealand's reputation as a safe and capable host for global events.

### 5.9.8 Research capability

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Several innovations have been developed within the post-event evaluation process that could be applied to future major events:

- **Development of a shared research platform.** Five central and local government stakeholders had an interest in the economic outcomes of hosting the FIFA WWC – MBIE, Tātaki Auckland Unlimited, Hamilton City Council, WellingtonNZ, and Dunedin City Council. The typical approach would be for each stakeholder to commission its own research, resulting in duplication of effort, inconsistent methods (and potentially results), high respondent burden, and high overall cost. The approach for the FIFA WWC was to design a single research platform that met the evaluation needs of all government stakeholders. This involved the development of data collection tools that collected national data (to meet MBIE's evaluation requirements) and regional data (to meet Host City requirements) and was facilitated by a mixed funding model which is described below. This approach delivered consistent data for all government stakeholders and ensured that data only had to be collected once from each respondent group. The system of data collection tools developed for the FIFA WWC is presented in a separate document entitled "*Research Plan for FIFA Women's World Cup 2023*".
- **Development of a shared funding model.** The shared research plan described above was facilitated by a shared funding model whereby MBIE contracted with the research provider to deliver a national evaluation and each Host City contracted independently with the research provider to deliver an evaluation for their region. The contract with MBIE covered the development of a research platform to meet national evaluation requirements. This allowed the Host City contracts to be priced on a marginal cost basis i.e., regions only had to pay for additions to the research platform to meet their evaluation needs. This approach resulted in much lower costs and efficiencies for Host Cities relative the alternative of each party commissioning stand-alone research.
- **Development of new survey techniques.** Collecting enough data to support a national evaluation and four Host City evaluations is challenging both from a survey design perspective, and in terms of respondent burden. Most data collection forms are designed for single-destination events and can't be easily scaled to accommodate multiple Host Cities. New data collection forms therefore had to be developed for the FIFA WWC that collected the necessary data points in the most efficient way possible. This involved the use of innovative logic flows and question structures that haven't previously been used in New Zealand. The data collection forms developed for the FIFA WWC are presented in a separate document entitled "*Research Plan for FIFA Women's World Cup 2023*". These forms are in the public domain and could be applied to future events involving multiple Host Cities.



## 6 Cost-benefit analysis

This section uses the results reported in previous sections to conduct a cost-benefit analysis for New Zealand. The cost-benefit analysis has been designed to estimate the value of the resources consumed by the FIFA WWC, including opportunity costs when market prices are not available. Benefits have also been estimated at an overall level so that the gross benefit can be subtracted from the gross cost to reveal the net benefit. This approach ensures that the full cost of the event is considered while also producing an accurate benefit-cost ratio (gross benefit divided by gross cost). All costs and benefits presented in this section are expressed in 2023-dollar terms.

### 6.1 Monetised costs and benefits to New Zealand

The analysis presented in this section focuses on the costs and benefits to New Zealand of co-hosting the FIFA WWC that can be monetised. Efforts have been made to monetise as many of the costs and benefits as possible to ensure that financial effects have the same standing as non-financial effects (social, cultural, and environmental) in the overall evaluation process. Material effects that have not been monetised are also noted in Section 6.2.

The **gross monetised cost** in the analysis represents the total value of financial and non-financial resources in New Zealand consumed by the FIFA WWC. This includes:

- 100% of central and local government investment in the FIFA WWC infrastructure and operating expenses. The resulting investment has been inflated by 20% to reflect deadweight loss, as per Treasury guidelines.
- Event attendee costs – the value of the time and money invested in the event by New Zealand resident attendees.
- Business costs – the value of the resources required to service additional demand in New Zealand caused by the FIFA WWC.
- Carbon cost – the unpriced cost of the additional CO<sub>2</sub>e that can be attributed to the FIFA WWC.

The **gross monetised benefit** in the analysis represents the total value that accrued to New Zealand businesses and consumers due to the co-hosting of the FIFA WWC. This includes:

- Event attendee benefits – the gross social value accruing to New Zealand resident event attendees, which is equivalent to the event attendee cost plus the consumer surplus derived from their investment of time and money.
- Business benefits – the value of additional business demand (revenue) for New Zealand businesses caused by the FIFA WWC.
- Media benefits – the value of the media exposure generated by the FIFA WWC to New Zealand. This is based on the estimated value of future tourism flows caused by the exposure and therefore represents an “outcomes” driven value rather than a traditional “equivalent advertising value”.
- Non-attendee benefits – the gross social value accruing to New Zealand resident non-attendees, delivered through option values, existence values, and national pride.
- Avoided future costs – the value of the planned infrastructure projects in New Zealand that were brought forward because of the FIFA WWC. These offset some of the government costs attributable to the FIFA WWC.



The cost-benefit analysis for New Zealand has identified a gross monetised cost of **\$323.2 million** and a gross monetised benefit of **\$432.6 million**. The net monetised benefit is therefore **\$109.5 million** and the benefit-cost ratio (gross benefit divided by gross cost) is **1.34**. This means that every \$1 of cost incurred by New Zealand returned a benefit of \$1.34 (a net benefit of \$0.34 per dollar).

**Table 44: Estimated costs and benefits to New Zealand of co-hosting the FIFA WWC**

Source: All sources listed in Table 13 in Section 2.3

| Measure                         | Value (\$m)    | Description   |
|---------------------------------|----------------|---|
| Government costs                | \$101.1        | Total cost to central and local government  |
| Public funds cost               | \$20.2         | Redistribution of public funds cost @ 20% as per Treasury guidelines                                  |
| Event attendee costs            | \$80.3         | Value of time and money devoted to the FIFA WWC by attendees  |
| Business costs                  | \$118.6        | Value of the resources consumed by businesses to service the additional demand caused by the FIFA WWC |
| Carbon costs <sup>38</sup>      | \$3.0          | Value of unpriced carbon production attributable to the FIFA WWC                                      |
| Other costs                     | \$0.0          | Other monetised costs   |
| <b>Total cost</b>               | <b>\$323.2</b> | <b>Total gross cost generated by FIFA WWC</b>   |
| Event attendee benefits         | \$117.8        | Social value to FIFA WWC attendees (event attendee cost + estimated consumer surplus)                 |
| Business benefits <sup>39</sup> | \$191.6        | Value of additional business demand (revenue) caused by FIFA WWC                                      |
| Media benefits <sup>40</sup>    | \$22.5         | Value of media exposure generated by the FIFA WWC (estimated future value of tourism generated)       |
| Non-attendee benefits           | \$78.6         | Social value accruing to non-attendees (option value/existence value/national pride)                  |
| Avoided future costs            | \$18.5         | Avoided future infrastructure costs due to projects being brought forward for the FIFA WWC            |
| Other benefits                  | \$3.8          | Other monetised benefits  |
| <b>Total benefit</b>            | <b>\$432.6</b> | <b>Total gross benefit generated by the FIFA WWC</b>  |
| <b>Net benefit</b>              | <b>\$109.5</b> | <b>Total benefit less total cost</b>  |
| <b>Benefit-cost ratio</b>       | <b>1.34</b>    | <b>Total benefit divided by total cost</b>  |

## 6.2 Non-monetised costs and benefits to New Zealand

The following impacts are noted as non-monetised costs or benefits to New Zealand of hosting the FIFA WWC. Additional details are provided in Section 5.9.

- **Visibility and perception of women’s sport in New Zealand.** A key government objective of co-hosting the FIFA WWC was “increasing the visibility of, and value placed on, women in sport and wider society”. Evidence from post-event surveys of FIFA WWC attendees, and research conducted by Sport NZ, indicates

<sup>38</sup> Best estimate at time of writing – may be subject to change.

<sup>39</sup> Includes 10% of event income sourced from, and spent in, New Zealand, as per MBIE’s event evaluation guidelines.

<sup>40</sup> Best estimate at time of writing – may be subject to change.



that this objective was achieved. The long-term legacy of these visibility and perception impacts will depend on the extent to which they are leveraged and built upon in future years.

- **Infrastructure outcomes.** Significant investments were made in stadia and football club infrastructure across New Zealand to comply with FIFA’s requirements. Many of these changes will be long-lived, resulting in better facilities for communities, football clubs and other sporting codes, and safer and more appropriate environments for women. The facilities in Table 45 benefitted from FIFA WWC upgrades.

**Table 45: Facilities benefitting from infrastructure upgrades due to the FIFA WWC**

Source: MBIE, Sport NZ

| City             | Facility  |
|------------------|---|
| Auckland         | Eden Park<br>North Harbour Stadium<br>The Trusts Arena<br>Shepherds Park<br>Keith Hay Park<br>Bay City Park<br>Fred Taylor Park<br>Michaels Avenue Reserve<br>Seddon Fields<br>Olympic Park<br>Māngere Centre Park<br>McLennan Park |
| Hamilton         | Waikato Stadium (FMG Stadium)<br>Porritt Park<br>Gower Park<br>Korikori Park  |
| Tauranga         | Bay Oval  |
| Napier           | McClellan Park – (gender-neutral upgrades only)   |
| Palmerston North | Massey University   |
| Wellington       | Wellington Regional Stadium (Sky Stadium)<br>Martin Luckie Park<br>Newtown Park<br>Porirua Park   |
| Christchurch     | Orangetheory Stadium<br>Avonhead Park<br>Ngā Puna Wai   |
| Dunedin          | Dunedin Stadium (Forsyth Barr Stadium)<br>Caledonian Sportsground<br>Tahuna Park<br>University #6   |

- **Football outcomes.** Co-hosting the FIFA WWC not only showcased and elevated women’s football in New Zealand, but football more generally. Survey results indicate that around 17% of New Zealanders were inspired by the FIFA WWC to increase their participation in football. While actual changes in participation are likely to be lower than intended changes (not all intentions come to fruition), it is likely that the changes in awareness and perception created by the FIFA WWC will have long-term benefits for football



in New Zealand at social, club, and high-performance levels. Early evidence of these benefits will not be available until mid-2024 when registrations for the 2024 club season are complete.

- **Celebrating New Zealand and its unique culture on the world stage.** Co-hosting the FIFA WWC gave New Zealand an opportunity to showcase its culture, stories, and brand to a large global audience. The extensive leverage and legacy programme extended New Zealand's reach well beyond the football pitch to showcase our unique culture and tell the New Zealand story; promote New Zealand as a tourism destination; celebrate our leadership in gender equality and women's sport; and use sport diplomacy to improve our international diplomatic and trade relationships.
- **Educational and training outcomes.** More than 100,000 students and young people around the country had the opportunity to participate in leverage and legacy and community engagement initiatives that were delivered for the FIFA WWC. The aim was to deliver programmes that would have a transformative impact on the lives of young people with a particular focus on young women and girls.
- **Other community engagement outcomes.** The government's leverage and legacy programme had important community engagement objectives including connecting people with the FIFA WWC, ensuring teams and their communities felt safe and welcome, and bringing people together to build community, enhance wellbeing, and protect the environment.
- **Event delivery capability.** Co-hosting the FIFA WWC was arguably the largest and most complex sports event ever hosted in New Zealand. The New Zealand component of the event was largely planned and delivered by New Zealanders, many of whom were drawing on their previous major event experience (FIFA events, Rugby World Cup 2021 (played in 2022), Women's Cricket World Cup 2022, 36<sup>th</sup> Americas Cup in 2021, World Masters Games 2017, Rugby World Cup 2011), but also being exposed to new systems and processes that could be applied to future events. The knowledge and experience gained from hosting the FIFA WWC will enhance New Zealand's major event capacity and capability, and the success of the event will enhance New Zealand's reputation as a safe and capable host for global events.
- **Research capability.** Several innovations were developed within the post-event evaluation process for the FIFA WWC that could be applied to future major events:
  - **Development of a shared research platform.** A single research platform was designed to meet the evaluation requirements of five government stakeholders: MBIE, Auckland Council, Hamilton City Council, WellingtonNZ, and Dunedin City Council. The resulting system of data collection tools is presented in a separate document entitled "Research Plan for FIFA Women's World Cup 2023".
  - **Development of a shared funding model.** The research platform described above was facilitated by a shared funding model whereby MBIE contracted with the research provider to deliver a national evaluation and each Host City contracted independently with the research provider to deliver an evaluation for their region. This approach resulted in much lower costs for all government stakeholders relative the alternative of each party commissioning stand-alone research.
  - **Development of new survey techniques.** Most data collection forms are designed for single-destination events and can't be easily scaled to accommodate multiple Host Cities. New data collection forms therefore had to be developed for the FIFA WWC that collected the necessary data points in the most efficient way possible. These forms are in the public domain and could be applied to future events involving multiple Host Cities.



### 6.3 Comparison with forecast

MBIE's event evaluation framework was used during the due diligence phase to assess the potential benefits of co-hosting the FIFA WWC. Valid comparisons can therefore be made between the most recent projected impacts on New Zealand (produced in 2019) and the realised impacts presented in this report, noting that neither the Draw nor Play-Off Tournament had been assigned to New Zealand at the time the projections were produced.

Realised gross costs were \$99.1 million (44%) higher than projected and realised benefits were \$164.4 million (61%) higher. The realised net benefit was \$65.3 million (148%) higher than projected and the realised benefit-cost ratio was 14 basis points (12%) higher than projected. Reasons for these variances include:

- the inclusion of Draw and Play-Off Tournament costs and benefits in this evaluation (these were not included in the 2019 projections because they hadn't been assigned to New Zealand at that stage).
- the inclusion of non-attendee benefits in this evaluation (non-attendee benefits were not considered in the 2019 projections).
- the teams that were drawn to play in New Zealand, as this was not finalised until February 2023 following the Play-Off Tournament. New Zealand was fortunate to host the United States team which was accompanied by the large group of supporters.
- Changes in central and local investment levels during the planning phase as the requirements and opportunities of co-hosting the FIFA WWC became more certain.

**Table 46: Comparison of realised and projected impacts**

Source: FIFA WWC Impact Evaluation (2023), FIFA WWC pre-event evaluation

| Measure                      | Realised (2023) | Projected (2019) <sup>41</sup> | Variance | Percentage variance |
|------------------------------|-----------------|--------------------------------|----------|---------------------|
| Gross cost (\$m)             | \$323.2         | \$224.1                        | \$99.1   | 44%                 |
| Gross benefit (\$m)          | \$432.6         | \$268.3                        | \$164.4  | 61%                 |
| Net benefit (\$m)            | \$109.5         | \$44.2                         | \$65.3   | 148%                |
| Benefit-cost ratio           | 1.34            | 1.20                           | 0.14     | 12%                 |
| International visitors       | 26,915          | 22,706                         | 4,209    | 19%                 |
| International visitor nights | 312,008         | 335,090                        | -23,082  | -7%                 |

<sup>41</sup> Taken from the final business case which was published in 2019. The monetary figures have been left in 2019-dollar terms to provide direct alignment with the figures presented in the business case. The realised figures are presented in 2023-dollar terms.



## 6.4 Monetised costs and benefits to Host Cities

Independent economic impact evaluations were commissioned and paid for by each Host City. These Host City evaluations leveraged the research plans funded by MBIE and used the same methodology and research provider as the national evaluation. The executive summaries from each Host City evaluation are presented below. Note that the Host City evaluations don't sum to the national evaluation for two reasons:

1. some of the national costs and benefits accrued to areas outside the Host Cities;
2. financial transfers between regions (e.g., spend by domestic visitors) are included in the Host City evaluations but treated as zero sum in the national evaluation.

**Table 47: Summary of impacts on Host Cities**

Source: Independent evaluations commissioned by Host Cities

| Measure                      | Auckland | Hamilton | Wellington | Dunedin |
|------------------------------|----------|----------|------------|---------|
| Gross cost (\$m)             | \$154.8  | \$19.6   | \$59.0     | \$27.3  |
| Gross benefit (\$m)          | \$203.6  | \$26.0   | \$83.6     | \$34.1  |
| Net benefit (\$m)            | \$48.9   | \$6.4    | \$24.6     | \$6.8   |
| Benefit-cost ratio           | 1.32     | 1.33     | 1.42       | 1.25    |
| Visitor nights <sup>42</sup> | 175,279  | 15,034   | 100,124    | 39,793  |

<sup>42</sup> Includes domestic and international visitor nights. The national evaluation only includes international visitor nights.





### 6.4.1 Monetised costs and benefits to Auckland

The cost-benefit analysis for Auckland has identified a gross monetised cost of **\$154.8 million** and a gross monetised benefit of **\$203.6 million**. The net monetised benefit is therefore **\$48.9 million** and the benefit-cost ratio (gross benefit divided by gross cost) is **1.32**. This means that every \$1 of cost incurred by Auckland returned a benefit of \$1.32 (a net benefit of \$0.32 per dollar).

**Table 48: Monetised costs and benefits to Auckland of hosting FIFA WWC**

Source: Independent evaluation for Auckland

| Measure                         | Value (\$m)    | Description   |
|---------------------------------|----------------|---|
| Government costs                | \$43.3         | Local government expenditure + population share of central government expenditure                 |
| Public funds cost               | \$8.7          | Redistribution of public funds cost @ 20% as per Treasury guidelines                              |
| Event attendee costs            | \$24.8         | Value of time & money devoted to FIFA WWC by attendees  |
| Business costs                  | \$76.5         | Value of the resources consumed by businesses to service the additional demand caused by FIFA WWC |
| Carbon costs                    | \$1.5          | Value of unpriced carbon production attributable to FIFA WWC                                      |
| Other costs                     | \$0.0          | Other monetised costs   |
| <b>Total cost</b>               | <b>\$154.8</b> | <b>Total gross cost generated by FIFA WWC</b>   |
| Event attendee benefits         | \$36.4         | Social value to FIFA WWC attendees (event attendee cost + estimated consumer surplus)             |
| Business benefits <sup>43</sup> | \$121.7        | Value of additional business demand (revenue) caused by FIFA WWC                                  |
| Media benefits                  | \$8.6          | Value of media exposure generated by FIFA WWC (estimated future value of tourism generated)       |
| Non-user benefits               | \$25.5         | Social value accruing to non-attendees (option value/existence value/national pride)              |
| Avoided future costs            | \$10.2         | Avoided future infrastructure costs due to projects being brought forward for FIFA WWC            |
| Other benefits                  | \$1.2          | Other monetised benefits  |
| <b>Total benefit</b>            | <b>\$203.6</b> | <b>Total gross benefit generated by FIFA WWC</b>  |
| <b>Net benefit</b>              | <b>\$48.9</b>  | <b>Total benefit less total cost</b>  |
| <b>Benefit-cost ratio</b>       | <b>1.32</b>    | <b>Total benefit divided by total cost</b>  |

<sup>43</sup> Includes 10% of event income sourced from, and spent in, Auckland, as per MBIE's event evaluation guidelines.



## 6.4.2 Monetised costs and benefits to Hamilton

The cost-benefit analysis for Hamilton has identified a gross monetised cost of **\$19.6 million** and a gross monetised benefit of **\$26 million**. The net monetised benefit is therefore **\$6.4 million** and the benefit-cost ratio (gross benefit divided by gross cost) is **1.33**. This means that every \$1 of cost incurred by Hamilton returned a benefit of \$1.33 (a net benefit of \$0.33 per dollar).

**Table 49: Monetised costs and benefits to Hamilton of hosting FIFA WWC**

Source: Independent evaluation for Hamilton

| Measure                         | Value (\$m)   | Description   |
|---------------------------------|---------------|---|
| Government costs                | \$5.0         | Local government expenditure + population share of central government expenditure                 |
| Public funds cost               | \$1.0         | Redistribution of public funds cost @ 20% as per Treasury guidelines                              |
| Event attendee costs            | \$2.1         | Value of time and money devoted to FIFA WWC by attendees  |
| Business costs                  | \$11.3        | Value of the resources consumed by businesses to service the additional demand caused by FIFA WWC |
| Carbon costs                    | \$0.2         | Value of unpriced carbon production attributable to FIFA WWC                                      |
| Other costs                     | \$0.0         | Other monetised costs   |
| <b>Total cost</b>               | <b>\$19.6</b> | <b>Total gross cost generated by FIFA WWC</b>   |
| Event attendee benefits         | \$3.1         | Social value to FIFA WWC attendees (event attendee cost + estimated consumer surplus)             |
| Business benefits <sup>44</sup> | \$17.8        | Value of additional business demand (revenue) caused by FIFA WWC                                  |
| Media benefits                  | \$1.4         | Value of media exposure generated by FIFA WWC (estimated future value of tourism generated)       |
| Non-user benefits               | \$2.6         | Social value accruing to non-attendees (option value/existence value/national pride)              |
| Avoided future costs            | \$0.9         | Avoided future infrastructure costs due to projects being brought forward for FIFA WWC            |
| Other benefits                  | \$0.1         | Other monetised benefits  |
| <b>Total benefit</b>            | <b>\$26.0</b> | <b>Total gross benefit generated by FIFA WWC</b>  |
| <b>Net benefit</b>              | <b>\$6.4</b>  | <b>Total benefit less total cost</b>  |
| <b>Benefit-cost ratio</b>       | <b>1.33</b>   | <b>Total benefit divided by total cost</b>  |

<sup>44</sup> Includes 10% of event income sourced from, and spent in, Hamilton, as per MBIE's event evaluation guidelines.



### 6.4.3 Monetised costs and benefits to Wellington

The cost-benefit analysis for Wellington has identified a gross monetised cost of **\$59 million** and a gross monetised benefit of **\$83.6 million**. The net monetised benefit is therefore **\$24.6 million** and the benefit-cost ratio (gross benefit divided by gross cost) is **1.42**. This means that every \$1 of cost incurred by Wellington returned a benefit of \$1.42 (a net benefit of \$0.42 per dollar).

**Table 50: Monetised costs and benefits to Wellington of hosting FIFA WWC**

Source: Independent evaluation for Wellington

| Measure                         | Value (\$m)   | Description   |
|---------------------------------|---------------|---|
| Government costs                | \$11.7        | Local government expenditure + population share of central government expenditure                 |
| Public funds cost               | \$2.3         | Redistribution of public funds cost @ 20% as per Treasury guidelines                              |
| Event attendee costs            | \$15.0        | Value of time & money devoted to FIFA WWC by attendees  |
| Business costs                  | \$29.0        | Value of the resources consumed by businesses to service the additional demand caused by FIFA WWC |
| Carbon costs                    | \$1.0         | Value of unpriced carbon production attributable to FIFA WWC                                      |
| Other costs                     | \$0.0         | Other monetised costs   |
| <b>Total cost</b>               | <b>\$59.0</b> | <b>Total gross cost generated by FIFA WWC</b>   |
| Event attendee benefits         | \$22.1        | Social value to FIFA WWC attendees (event attendee cost + estimated consumer surplus)             |
| Business benefits <sup>45</sup> | \$46.0        | Value of additional business demand (revenue) caused by FIFA WWC                                  |
| Media benefits                  | \$2.8         | Value of media exposure generated by FIFA WWC (estimated future value of tourism generated)       |
| Non-user benefits               | \$8.6         | Social value accruing to non-attendees (option value/existence value/national pride)              |
| Avoided future costs            | \$3.7         | Avoided future infrastructure costs due to projects being brought forward for FIFA WWC            |
| Other benefits                  | \$0.4         | Other monetised benefits  |
| <b>Total benefit</b>            | <b>\$83.6</b> | <b>Total gross benefit generated by FIFA WWC</b>  |
| <b>Net benefit</b>              | <b>\$24.6</b> | <b>Total benefit less total cost</b>  |
| <b>Benefit-cost ratio</b>       | <b>1.42</b>   | <b>Total benefit divided by total cost</b>  |

<sup>45</sup> Includes 10% of event income sourced from, and spent in, Wellington, as per MBIE's event evaluation guidelines.



#### 6.4.4 Monetised costs and benefits to Dunedin

The cost-benefit analysis for Dunedin has identified a gross monetised cost of **\$27.3 million** and a gross monetised benefit of **\$34.1 million**. The net monetised benefit is therefore **\$6.8 million** and the benefit-cost ratio (gross benefit divided by gross cost) is **1.25**. This means that every \$1 of cost incurred by Dunedin returned a benefit of \$1.25 (a net benefit of \$0.25 per dollar).

**Table 51: Monetised costs and benefits to Dunedin of hosting FIFA WWC**

Source: Independent evaluation for Dunedin

| Measure                         | Value (\$m)   | Description   |
|---------------------------------|---------------|---|
| Government costs                | \$8.1         | Local government expenditure + population share of central government expenditure                 |
| Public funds cost               | \$1.6         | Redistribution of public funds cost @ 20% as per Treasury guidelines                              |
| Event attendee costs            | \$3.6         | Value of time and money devoted to FIFA WWC by attendees  |
| Business costs                  | \$13.7        | Value of the resources consumed by businesses to service the additional demand caused by FIFA WWC |
| Carbon costs                    | \$0.3         | Value of unpriced carbon production attributable to FIFA WWC                                      |
| Other costs                     | \$0.0         | Other monetised costs   |
| <b>Total cost</b>               | <b>\$27.3</b> | <b>Total gross cost generated by FIFA WWC</b>   |
| Event attendee benefits         | \$5.2         | Social value to FIFA WWC attendees (event attendee cost + estimated consumer surplus)             |
| Business benefits <sup>46</sup> | \$21.9        | Value of additional business demand (revenue) caused by FIFA WWC                                  |
| Media benefits                  | \$1.6         | Value of media exposure generated by FIFA WWC (estimated future value of tourism generated)       |
| Non-user benefits               | \$2.1         | Social value accruing to non-attendees (option value/existence value/national pride)              |
| Avoided future costs            | \$3.1         | Avoided future infrastructure costs due to projects being brought forward for FIFA WWC            |
| Other benefits                  | \$0.1         | Other monetised benefits  |
| <b>Total benefit</b>            | <b>\$34.1</b> | <b>Total gross benefit generated by FIFA WWC</b>  |
| <b>Net benefit</b>              | <b>\$6.8</b>  | <b>Total benefit less total cost</b>  |
| <b>Benefit-cost ratio</b>       | <b>1.25</b>   | <b>Total benefit divided by total cost</b>  |

<sup>46</sup> Includes 10% of event income sourced from, and spent in, Dunedin, as per MBIE's event evaluation guidelines.



## 7 Appendices

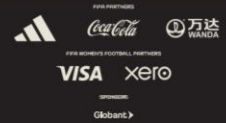


### Appendix 1: FIFA WWC Match Schedule

|     |  | Group Matches    |                |                  |                |                |                 |                   |                  | Round of Sixteen |                  |                |                | Quarter Finals   |                    | Semi Finals       |                 | 3 <sup>rd</sup> Place & Final |                 |                 |                  |                    |                    |                  |                    |                  |                  |                   |                     |                    |                  |                    |                  |
|-----|--|------------------|----------------|------------------|----------------|----------------|-----------------|-------------------|------------------|------------------|------------------|----------------|----------------|------------------|--------------------|-------------------|-----------------|-------------------------------|-----------------|-----------------|------------------|--------------------|--------------------|------------------|--------------------|------------------|------------------|-------------------|---------------------|--------------------|------------------|--------------------|------------------|
|     |  | THURSDAY 20 July | FRIDAY 21 July | SATURDAY 22 July | SUNDAY 23 July | MONDAY 24 July | TUESDAY 25 July | WEDNESDAY 26 July | THURSDAY 27 July | FRIDAY 28 July   | SATURDAY 29 July | SUNDAY 30 July | MONDAY 31 July | TUESDAY 1 August | WEDNESDAY 2 August | THURSDAY 3 August | FRIDAY 4 August | SATURDAY 5 August             | SUNDAY 6 August | MONDAY 7 August | TUESDAY 8 August | WEDNESDAY 9 August | THURSDAY 10 August | FRIDAY 11 August | SATURDAY 12 August | SUNDAY 13 August | MONDAY 14 August | TUESDAY 15 August | WEDNESDAY 16 August | THURSDAY 17 August | FRIDAY 18 August | SATURDAY 19 August | SUNDAY 20 August |
| NZL | AUCKLAND / TĀMAKI MAKĀURAU EDEN PARK                         | NZL v NOR        | USA v VIE      |                  | ITA v ARG      |                | ESP v ZAM       |                   |                  |                  |                  | NOR v PHI      | POR v USA      |                  |                    |                   |                 |                               |                 |                 |                  |                    |                    |                  |                    |                  |                  |                   |                     |                    |                  |                    |                  |
| AUS | SYDNEY / GADIGAL SYDNEY FOOTBALL STADIUM                     |                  |                |                  | FRA v JAM      |                | COL v KOR       |                   | ENG v DEN        |                  | GER v COL        |                | PAN v FRA      |                  |                    |                   |                 |                               |                 |                 |                  |                    |                    |                  |                    |                  |                  |                   |                     |                    |                  |                    |                  |
| NZL | DUNEDIN / ŌTEPOTI DUNEDIN STADIUM                            |                  | PHI v SLU      |                  | NED v POR      |                | JPN v CRC       |                   | ARG v RSA        |                  | SLU v NZL        |                | VIE v NED      |                  |                    |                   |                 |                               |                 |                 |                  |                    |                    |                  |                    |                  |                  |                   |                     |                    |                  |                    |                  |
| AUS | MELBOURNE / NAARM MELBOURNE RECTANGULAR STADIUM              |                  | NGA v CAN      |                  | GER v MAR      |                |                 |                   |                  |                  |                  | CAN v AUS      | JAM v BRA      |                  |                    |                   |                 |                               |                 |                 |                  |                    |                    |                  |                    |                  |                  |                   |                     |                    |                  |                    |                  |
| NZL | WELLINGTON / TE WHANGANUI-A-TARA WELLINGTON REGIONAL STADIUM |                  | ESP v CRC      |                  | SWE v RSA      |                | NZL v PHI       |                   | USA v NED        |                  | SWE v ITA        |                | JPN v ESP      |                  | ARG v ITA          |                   |                 |                               |                 |                 |                  |                    |                    |                  |                    |                  |                  |                   |                     |                    |                  |                    |                  |
| NZL | HAMILTON / KIRIKIRIROA WAIKATO STADIUM                       |                  |                | ZAM v JPN        |                |                | SLU v NOR       |                   | POR v VIE        |                  |                  | CRC v ZAM      |                | ARG v SWE        |                    |                   |                 |                               |                 |                 |                  |                    |                    |                  |                    |                  |                  |                   |                     |                    |                  |                    |                  |
| AUS | BRISBANE / MEANJIN BRISBANE STADIUM                          |                  | ENG v HAI      |                  |                |                |                 |                   | AUS v NGA        |                  | FRA v BRA        | IRL v NGA      |                |                  | KOR v GER          |                   |                 |                               |                 |                 |                  |                    |                    |                  |                    |                  |                  |                   |                     |                    |                  |                    |                  |
| AUS | PERTH / BOORLOO PERTH RECTANGULAR STADIUM                    |                  | DEN v CHN      |                  |                |                | CAN v IRL       |                   |                  |                  | PAN v JAM        |                | HAI v DEN      |                  | MAR v COL          |                   |                 |                               |                 |                 |                  |                    |                    |                  |                    |                  |                  |                   |                     |                    |                  |                    |                  |
| AUS | ADELAIDE / TARNTANYA HINDMARSH STADIUM                       |                  |                |                  | BRA v PAN      |                |                 | CHN v HAI         |                  | KOR v MAR        |                  |                | CHN v ENG      |                  |                    |                   |                 |                               |                 |                 |                  |                    |                    |                  |                    |                  |                  |                   |                     |                    |                  |                    |                  |
| AUS | SYDNEY / GADIGAL STADIUM AUSTRALIA                           |                  | AUS v IRL      |                  |                |                |                 |                   |                  |                  |                  |                |                |                  |                    |                   |                 |                               |                 |                 |                  |                    |                    |                  |                    |                  |                  |                   |                     |                    |                  |                    |                  |

\* NOTE: Match 1 is the Opening match including the Opening Ceremony
© FIFA

|   |   |  |   |   |   |  |  |
|---|---|--|---|---|---|--|--|
| <b>GROUP A</b>  | <b>GROUP B</b>  | <b>GROUP C</b>   | <b>GROUP D</b>  | <b>GROUP E</b>  | <b>GROUP F</b>  | <b>GROUP G</b>   | <b>GROUP H</b>   |
| New Zealand (NZL)<br>Norway (NOR)<br>Philippines (PHI)<br>Switzerland (SUI) | Australia (AUS)<br>Republic of Ireland (IRL)<br>Nigeria (NGA)<br>Canada (CAN) | Spain (ESP)<br>Costa Rica (CRC)<br>Zambia (ZAM)<br>Japan (JPN) | England (ENG)<br>Haiti (HAI)<br>Denmark (DEN)<br>China PR (CHN) | USA (USA)<br>Vietnam (VIE)<br>Netherlands (NED)<br>Portugal (POR) | France (FRA)<br>Jamaica (JAM)<br>Brazil (BRA)<br>Panama (PAN) | Sweden (SWE)<br>South Africa (RSA)<br>Italy (ITA)<br>Argentina (ARG) | Germany (GER)<br>Morocco (MAR)<br>Colombia (COL)<br>Korea Republic (KOR) |





## Appendix 2: Sport NZ Research Infographic

# 2023 Women's Sporting Landscape

The recent Rugby and Football World Cups in Aotearoa New Zealand drove big increases in interest and engagement with women's sport, according to our recent Sport NZ/Gemba research.

Gemba



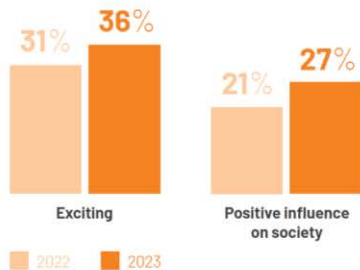
### Consumption of women's sport

Since July 2022, viewership of women's sport has increased by 29%.



### Perceptions of women's sport

Significantly more New Zealanders perceive women's sport as exciting and having a positive influence on society.



### Athlete Awareness

Marketability of female athletes and teams has risen, driven by increased awareness.



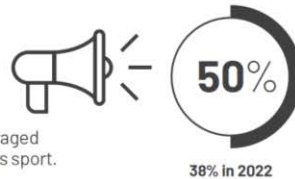
### National team interest

Three women's national teams are now in the top five most popular in New Zealand, up from only one in 2022.

- 1 The All Blacks (Men's Rugby Union)
- 2 The Black Ferns (Women's Rugby Union) 
- 3 Men's Rugby Sevens Team
- 4 The Silver Ferns (Women's Netball) 
- 5 Women's Rugby Sevens Team

### Advocacy for women's sport

Half of New Zealanders said they had recently advocated for or encouraged others to watch women's sport.

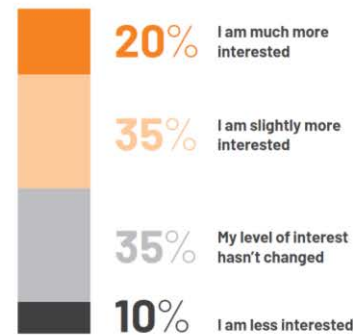


### FIFA Women's World Cup Impact

The majority of New Zealanders heard or saw something about the FIFA Women's World Cup 2023 and watched a game during the tournament.



Following the FIFA Women's World Cup 2023, over half of New Zealand indicated they were more interested in women's football.



Survey conducted in September 2023 based on a representative sample of 1007 New Zealanders. All increases displayed are statistically significant.

[sportnz.org.nz/its-time](https://sportnz.org.nz/its-time)

