



nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™

PARALYMPICS AND PARA- SPORTS

**THE RISE OF PARA-SPORTS,
THE GROWTH OF THE PARALYMPIC
GAMES AND THE OPPORTUNITIES
FOR FANS AND BRANDS.**





PARALYMPICS

GLENN LOVETT

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Over the past decade or so the Paralympic Games has established itself as a major sporting event in its own right. Each edition delivers hundreds of compelling stories created by thousands of athletes in front of millions of viewers.

By almost any measure, London 2012 was the most successful edition yet, building on another successful summer Games in Beijing four years earlier: more viewers, more recognition for athletes and more interest in para-sports. That has also stimulated new commercial opportunities for brands at either a global or national level, a chance to associate themselves with great athletes, growing profiles, and events that are growing in stature.

But the Paralympic Games is about more than sport, and it is here where the International Paralympic Committee believes it has its unique selling point: as London 2012 showed, the Games can be a driver of social change that goes far beyond a stadium, helping to shift attitudes towards those with an impairment. In fact IPC President Sir Philip Craven believes today the Paralympic Games are the world's number one sports event for driving social inclusion.

This Nielsen Sports report therefore examines not only the rising interest in the Paralympics, its growing status as a media product and how the Games already works for partners, but also notes the opportunity it provides to change attitudes – and, critically, what that might mean for current and future para-sports sponsors.

There is much work still to be done around the world to further increase awareness of and interest in para-sport but at a time when many brands are seeking to attach themselves to social causes, the opportunity around the Paralympic Games is undeniable.

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For the past four years the International Paralympic Committee has been working to capitalise on the success of London 2012, an event which helped change attitudes towards those with an impairment.

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Post Rio-2016, the IPC has a growing calendar of major events and a strategic plan in place leading to Tokyo 2020, designed to showcase para-sports and its athletes more than ever before.

1

LONDON 2012 TO RIO 2016

FOR THE PAST FOUR YEARS THE INTERNATIONAL PARALYMPIC COMMITTEE HAS BEEN WORKING TO CAPITALISE ON THE SUCCESS OF LONDON 2012.



The Paralympic opening ceremony at London 2012.

LONDON 2012

The London 2012 Paralympic Games may have been a sporting and organisational triumph but it also succeeded in changing attitudes towards disability and those with an impairment.

62% followed coverage of London 2012, with the event watched by three times more viewers than Beijing 2008.

Interest in future para-sport events doubled, from 27% to 43%.

The main driver of TV viewing shifted from simply a general interest in sport to a desire to support ParalympicsGB and a general interest in how people can overcome their disability through sport.

42% they would be more likely to watch coverage of Paralympic sport in future.

THE GROWTH OF THE SUMMER PARALYMPIC GAMES

BEIJING 2008 AND LONDON 2012

- BEIJING 2008
- LONDON 2012



3.8 BILLION
CUMULATIVE
TV AUDIENCE IN
BEIJING 2008

2.7 MILLION
TICKETS SOLD
TO SPECTATORS IN
LONDON 2012

Source: Nielsen/LOCOG State of the Nation Report, September 2012

THE INTERNATIONAL PARALYMPIC COMMITTEE

Based in the German city of Bonn, the International Paralympic Committee (IPC) is responsible for the organisation of the Paralympic Games and increasing awareness of the Paralympic Movement.

The organisation also acts as the **international federation for nine para-sports**, including athletics, swimming and shooting and therefore organises key non-Paralympic events such as world championships.

Since 1988, the Paralympic Games have been staged in the same city as the Olympic Games as part of the IPC's co-operation agreement with the International Olympic Committee.

Following Rio 2016, the **next summer Paralympics** will take place in **Tokyo in 2020**, while PyeongChang (2018) and Beijing (2022) are the next two winter Paralympic Games.

Around half of the **IPC's funding** comes from revenues generated from the Paralympic Games. The IPC also has a well-established **commercial programme**. Worldwide partners include Toyota, Visa, prosthetics and rehabilitation supplier Otto Bock, Samsung, Panasonic and Atos.

Allianz and BP are classified as **International Partners**, both of which also support a number of National Paralympic Committees.



South African sprinter Ilse Hayes celebrates a gold at the 2015 IPC Athletics World Championships in Doha, Qatar.

BUILDING THE BRAND

A further indication of the growth of the Paralympic movement and the success of London 2012 could be gleaned by the increased recognition of the Agitos, the IPC's brand logo.

By the time the London 2012 Paralympics finished 20 million people in the host country said they recognised the logo, compared to 0.5 million before the Games began.

The IPC's development arm, the Agitos Foundation was formed in 2012 and is the leading global organisation 'for developing Para sport as a tool for changing lives and contributing to an inclusive society for all' – 15% of the global population has an impairment, with 80% living in the developing world.

The Agitos Foundation, combined with the increasing global profile of the Paralympic Games, presents obvious opportunities for brands looking to align themselves with sport and with a cause; an entry point to showcase themselves as a force for good.



20
MILLION PEOPLE
IN THE UK
RECOGNISED
THE AGITOS AFTER
LONDON 2012

CASE STUDY

THE IPC VIEWPOINT

ALEXIS SCHAEFER, International Paralympic Committee Marketing and Commercial Director:

► We have a couple of agreements with our commercial partners to renew – we are already in discussions with all of those partners about renewals post-Rio 2016. That is going to take a lot of my time from now until the end of the year. Even as we approach the closing ceremony of Rio, PyeongChang is already on the horizon. A new cycle

for broadcasters will start – in major markets we have already started conversations with our partners. And as the IPC we are responsible not only for the Games, we are responsible for a number of different sports and for us 2017 is going to be a major year with world championships in sports like alpine skiing, ice sledge hockey, swimming and also going back to the stadium in London for the Paralympic world championships next year.

THE CAUSE

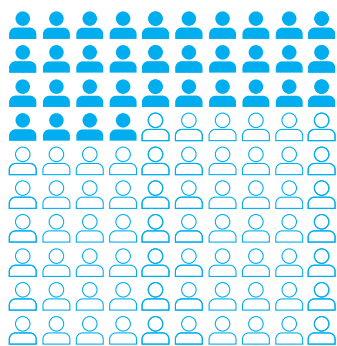
The Paralympic Games and para-sport are considered a cause as much as they are sport by the International Paralympic Committee. Through its major events, the organisation is able to showcase companies as a force for good and spearhead a perception change in terms of how people view impairment.

London 2012 was the catalyst for a significant attitudinal shift in the way residents of the UK view impairment – immediately after the Paralympics, 2 in 3 people believed the Games represented a breakthrough in attitudes.

Post-Games, **68%** of people said the Paralympics had been inspiring while **48%** wanted more coverage of Paralympic sport.

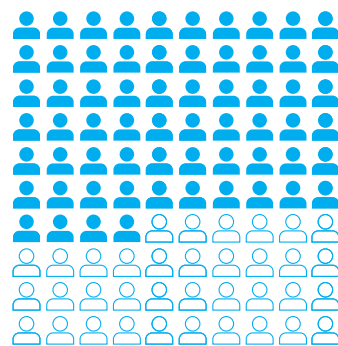
AN ATTITUDINAL SHIFT

PERCENTAGE OF PEOPLE WHO BELIEVE LONDON 2012 REPRESENTED A BREAKTHROUGH IN HOW PEOPLE WITH AN IMPAIRMENT ARE VIEWED.



MAY 2012

34%
OF PEOPLE



SEPTEMBER 2012

64%
OF PEOPLE

Source: Nielsen/LOCOG State of the Nation Report, September 2012

*all people 16+ (50.2m)

CASE STUDY

CHANNEL 4 AND THE PARALYMPIC GAMES

DAN BROOKE, Chief Marketing and Communications Officer, Channel 4:

► I am the Chief Marketing & Communications Officer for Channel 4 and also the board member responsible for championing diversity. The ‘Superhumans’ campaign for London 2012 was the biggest thing that has come out of my group. The Paralympics is a central part of Channel 4’s output, because we have a public service remit to do a variety of different things that it’s deemed would not be done to the same degree if it was left exclusively to the market. That includes a strong commitment to diversity but also to innovation and to alternative points of view and ways of seeing the world. It’s obvious to see how the Paralympics fit into that. I think that the Paralympics is an unusual thing in that it is extremely public service and what is called for us ‘remit-delivering’, but also capable of delivering a sizeable audience because it is, at least in the UK as a result of London 2012, a much more significant event than it was, I sense the mainstream nature of it is much further advanced in the UK than in almost any other country around the world. It uniquely as an event shares the opportunity to be something television viewers want to watch but is also a way of changing public attitudes towards disabled people. Both of those objectives are important for us.

ready did, from top to bottom. There are 30 different initiatives we’ve put together to do that because our view was that we needed to have a comprehensive approach to fundamentally change or develop the culture of the organisation and the people that we work with. The upshot of that is that of course nobody can remember 30 initiatives so while we will carry on with those – and we have a five year charter, with clear, measurable targets and we’ve committed to reporting our progress against it on an annual basis - we have decided to give each year a bit of an added focus as well.



Channel 4’s commitment to diversity manifests itself on-screen in programming such as *The Superhumans Show*.

“WE HAVE THE GOAL OF BECOMING ONE OF THE BEST DISABILITY EMPLOYERS.”

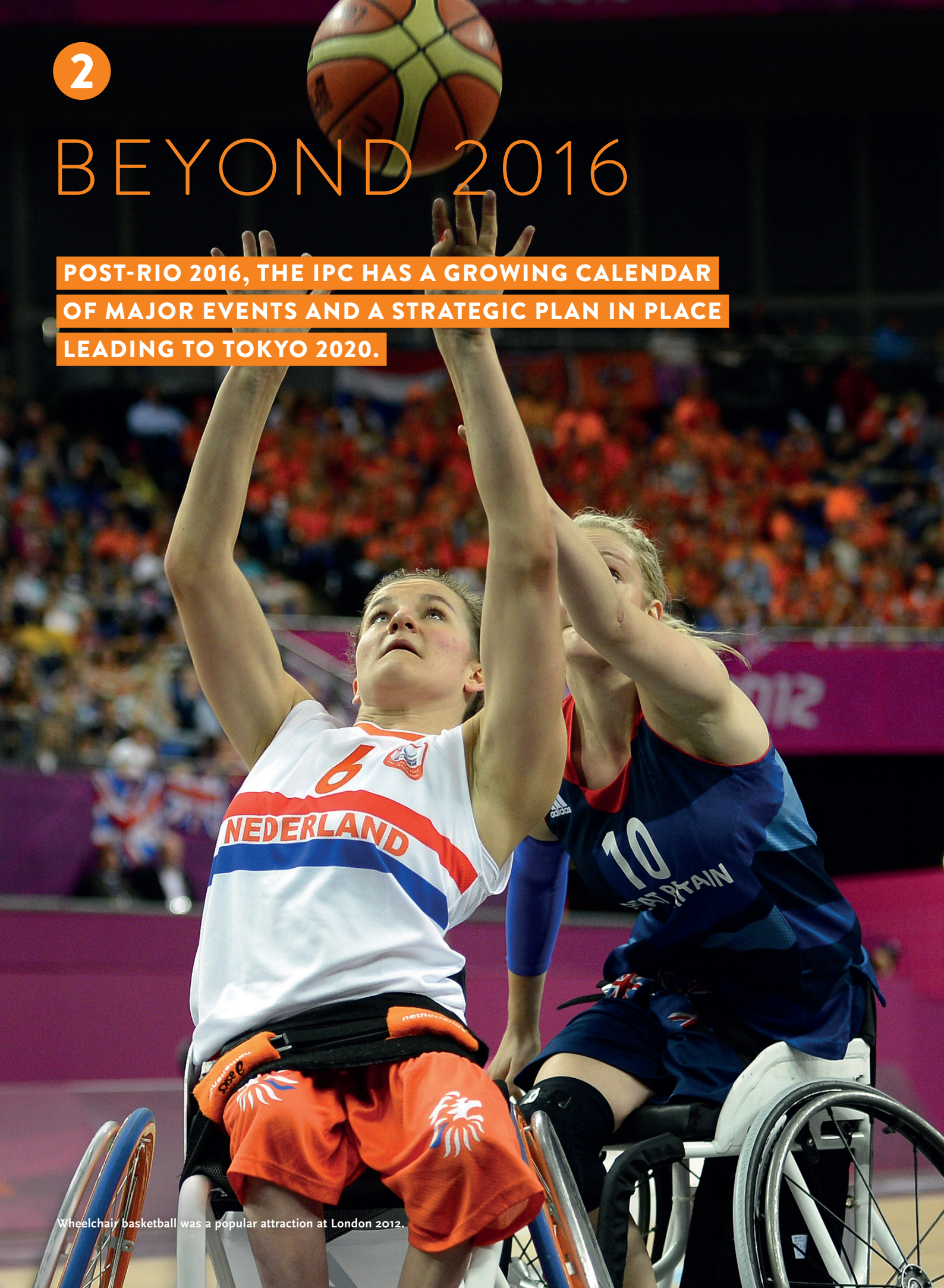
► The Paralympics has got us to think about our commitment to diversity in an even broader way. In January 2015 we published a 360 degree Diversity Charter, which aimed to say that across all the waterfronts of diversity – ethnicity, gender, sexuality and disability – and across all aspects of our business – inside our own organisation or with the production partners we work with – we were going to improve and bake in diversity more than we al-

► We’re going to have a ‘Year of...’ every year; 2016, because of Rio, is our Year of Disability. This is an additional commitment, which gives us extra energy and focus for a whole variety of activities. In addition, we’ve put out some commitments around the year – in 20 of our top shows we’re going to double the number of disabled people who appear; for the apprenticeships we offer inside the company, half of those are being guaranteed this year for people with disabilities; we offer a lot of work placements for young people, and we’ve committed that 30 per cent of those will be guaranteed for people with disabilities this year. Overall, we have the goal of becoming one of the best disability employers in the country as a result of the programme we are kicking off in 2016 – that’s where we’ll get to.

2

BEYOND 2016

POST-RIO 2016, THE IPC HAS A GROWING CALENDAR OF MAJOR EVENTS AND A STRATEGIC PLAN IN PLACE LEADING TO TOKYO 2020.



Wheelchair basketball was a popular attraction at London 2012.

COMMERCIALISING PARA-SPORTS

As well as building long term interest in the Paralympic Games, the IPC is working to raise the profile of other world-level para-sport events. 2017 is a vital one in that regard with a series of world championships scheduled, notably the World Para-Athletics Championships in London and the World Para-Swimming Championships in Mexico City. Doing so will help bridge the gap between Paralympic Games for sponsors, fans and broadcasters.

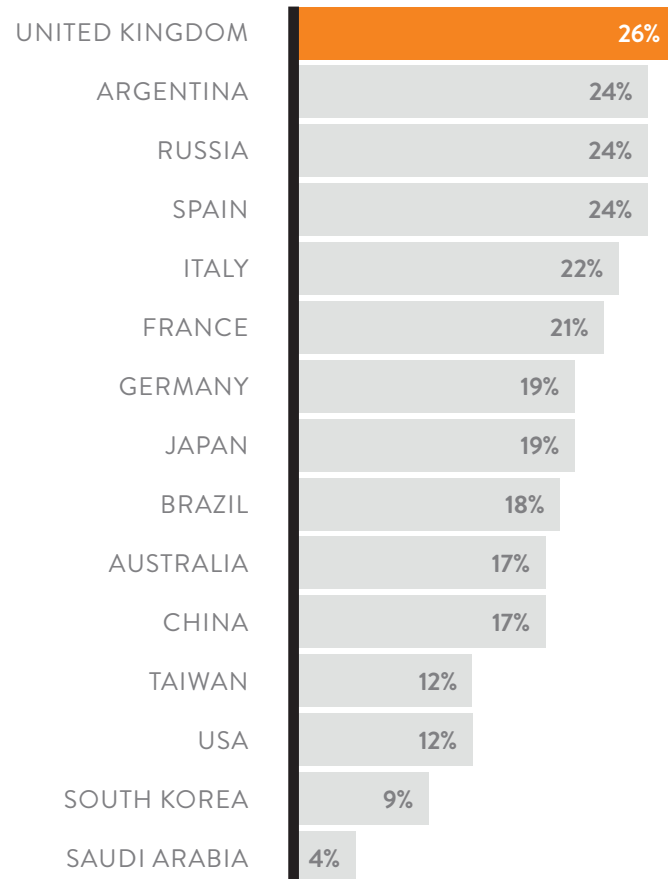
KEY PARA-SPORTS EVENTS 2016 - 17

- AUGUST 2016**
Rio 2016 Paralympic Games, Brazil
- FEBRUARY 2017**
IPC Nordic skiing World Championships, Finsterau, Germany
- SEPTEMBER 2017**
IPC Swimming World Championships, Mexico City, Mexico
- JANUARY 2017**
IPC Alpine Skiing World Championships, Tarvisio, Italy
- JULY 2017**
IPC Athletics World Championships, London, UK
- SEPTEMBER 2017**
IPC World Para Powerlifting Championships, Mexico City, Mexico

NEXT PARALYMPIC GAMES



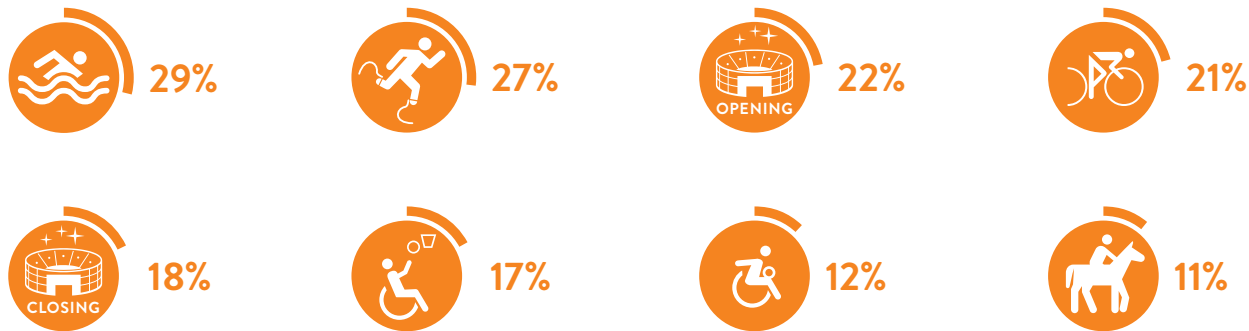
INTEREST IN THE PARALYMPICS



Source: Repucom SportsDNA: November 2015; selected markets, top 2 box

WHO WATCHED WHAT AT THE LONDON 2012 PARALYMPICS?

WATCHED TV COVERAGE



Source: Nielsen/LOCOG State of the Nation Report, September 2012

AWARENESS

The success of London 2012 propelled the Paralympic Games into a new era of viewership and media coverage. Since then, the IPC has begun to bundle broadcast agreements, with broadcasters encouraged to sign up for Sochi 2014 and Rio 2016. While Channel 4's UK coverage of the Paralympics and other para-sport events since 2012 has won plaudits, the IPC has trialled other broadcast models in other markets.

NEW BROADCAST MODELS

In Canada, for example, the broadcast rights were passed to the Canadian Paralympic Committee, which has built a consortium of some of Canada's largest media companies including CBC, Yahoo and Sportsnet to provide a record-breaking amount of coverage of Sochi 2014 and Rio 2016.

As well as rights fees, the IPC's goal is to increase awareness and interest in para-sports around the world: in London, the increased awareness of British Paralympians provides a model of how the strategy is working.



**CHANNEL 4
PLANS TO STREAM
700
HOURS OF SPORT
LIVE FROM THE RIO
2016 PARALYMPICS.**

AWARENESS OF BRITISH PARALYMPIANS

PRE- AND POST-PARALYMPIC GAMES IN THE UK

SEPTEMBER 2010

- 1 TANNI GREY-THOMPSON: 8%
- 2 ELEANOR SIMMONDS: 2%
- 3 DAVID WEIR: 1%
- 4 LEE PEARSON: 1%

SEPTEMBER 2012

- 1 ELEANOR SIMMONDS: 35%
- 2 DAVID WEIR: 27%
- 3 JONNIE PEACOCK: 18%
- 4 SARAH STOREY: 13%



Swimmer Eleanor Simmonds celebrates gold at London 2012.

Source: Nielsen/LOCOG State of the Nation Report, September 2012

GLOBAL AND NATIONAL

While the Paralympic Games already has an enviable portfolio of commercial partners, the IPC continues to work on developing commercial structures for national Paralympic federations. Several worldwide Games partners have parallel deals with a number of national committees, anchored around not only elite-level sport but also grassroots development of para-sport and the lowering of barriers to participation. That mission continues around the world.

IPC WORLDWIDE PARTNERS

TOYOTA

Signed a landmark contract in November 2014 to become an IPC partner and, from 2017, a partner of all National Paralympic Committees until 2024.

VISA

The first global sponsor of the IPC after signing a deal which began in 2002. It has exclusivity in the payment services category.

OTTO BOCK

Has had a relationship with the Paralympic Games since 1988 and is a partner of the IPC in the 'therapeutical medical devices' and 'rehabilitation and mobility healthcare products' categories.

SAMSUNG

Extended its contract with the IPC in October 2014, with the partnership now running at least until after the Tokyo 2020 Games.

ATOS

Signed its original deal in 1998 for IT services, with the most recent deal agreed in 2011.

PANASONIC

Signed its deal in October 2014.

ABOUT NIELSEN

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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IPC INTERNATIONAL PARTNERS

ALLIANZ

In addition to IPC deal, sponsors NPCs in Germany, Portugal, Australia, Bulgaria, Croatia, Hungary, Ireland, Switzerland and Turkey as "National Supporter".

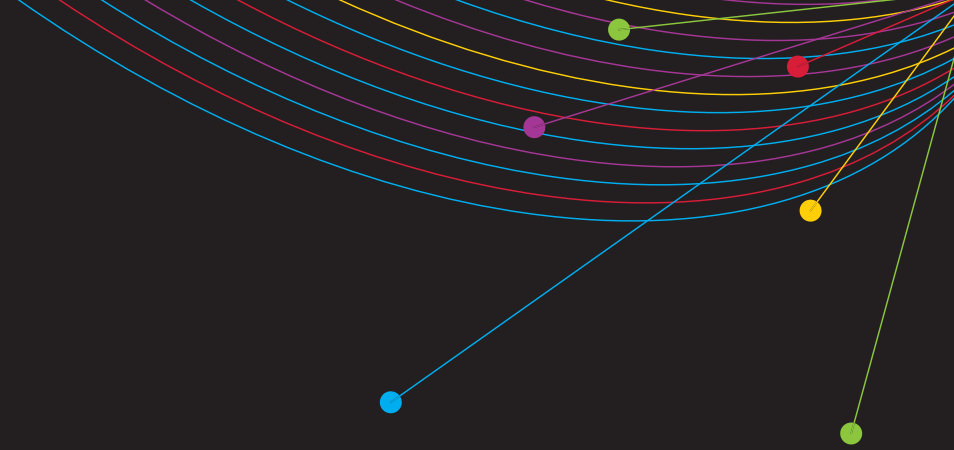
BP

Current deal in place until end of 2016; also sponsors NPCs in UK, USA, Angola, Azerbaijan, Georgia, Turkey and Trinidad & Tobago.

OFFICIAL LOGISTICS SUPPLIER

DB SCHENKER

Has worked with IPC since Athens 2004, providing logistics, freight forwarding and customs clearance services.



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