

# 2020 Olympics for All: Paralympics Survey

- Report -

- Conducted in March 2018 -



# The Paralympics: Ample potential reflected in public sentiment

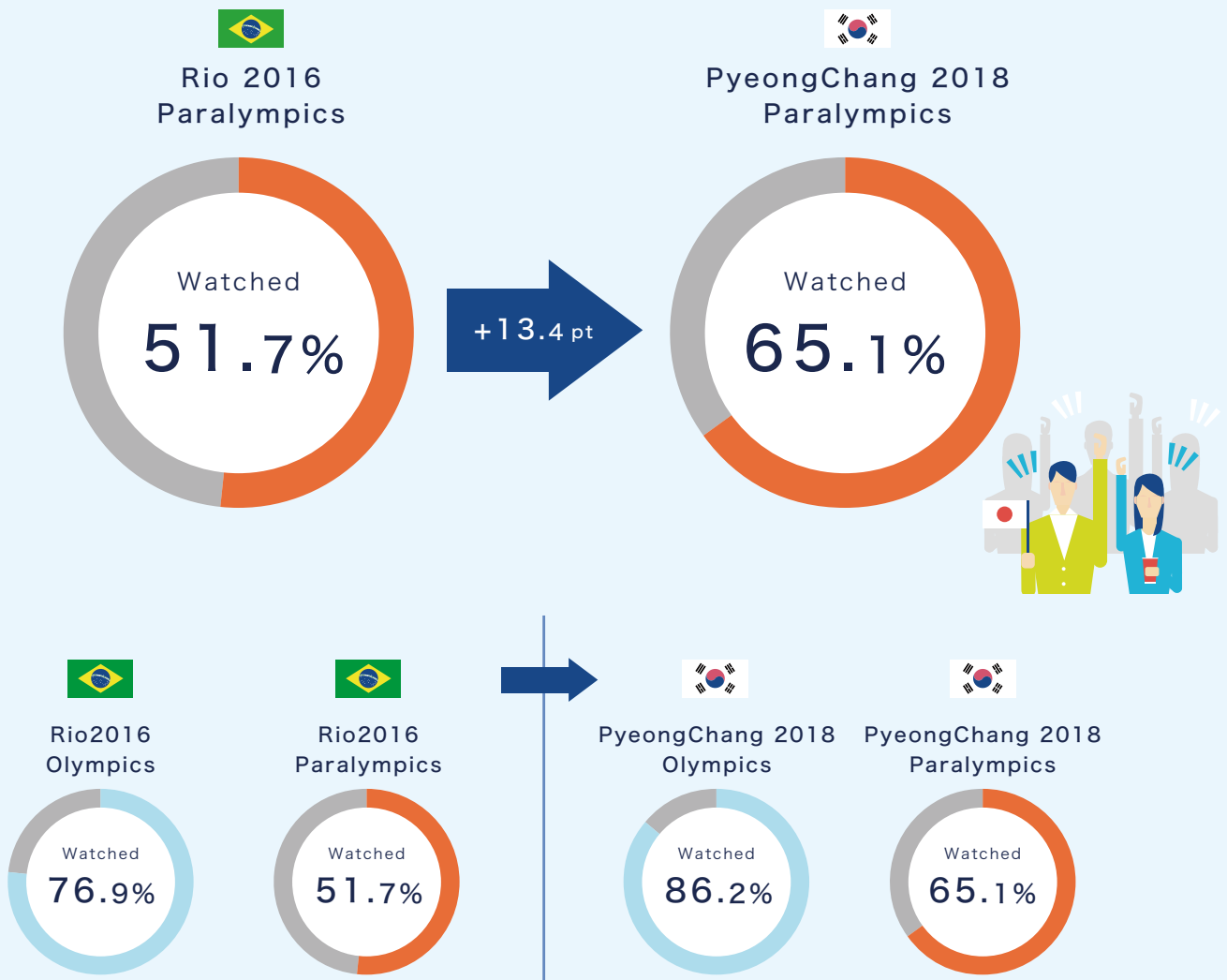
The Paralympics provide an abundance of excitement. Among several athletes whose performance attracted attention at the PyeongChang 2018 Paralympic Games, Momoka Muraoka took home five medals, including a gold medal in alpine skiing, while Gurimu Narita won gold in snowboarding. Undoubtedly, new stars will shine at the 2020 Paralympic Games in Tokyo.

In March 2018, Dentsu conducted a survey of popular awareness regarding the Paralympics. Across the nation, 3,000 men and women aged 15–69 were polled. The questions put to them focused on people’s expectations for, and image of, the Paralympics and other related issues. We hope the insights provided by the survey will prove useful.

## 1 A growing number of people are watching the Paralympics.

Of the survey respondents, 51.7% said they had watched the 2016 Rio Paralympics (at the venue or on television), while 65.1% had watched the 2018 PyeongChang Paralympics. This 13.4-point rise in just two years indicates steadily growing public interest in the Paralympics.

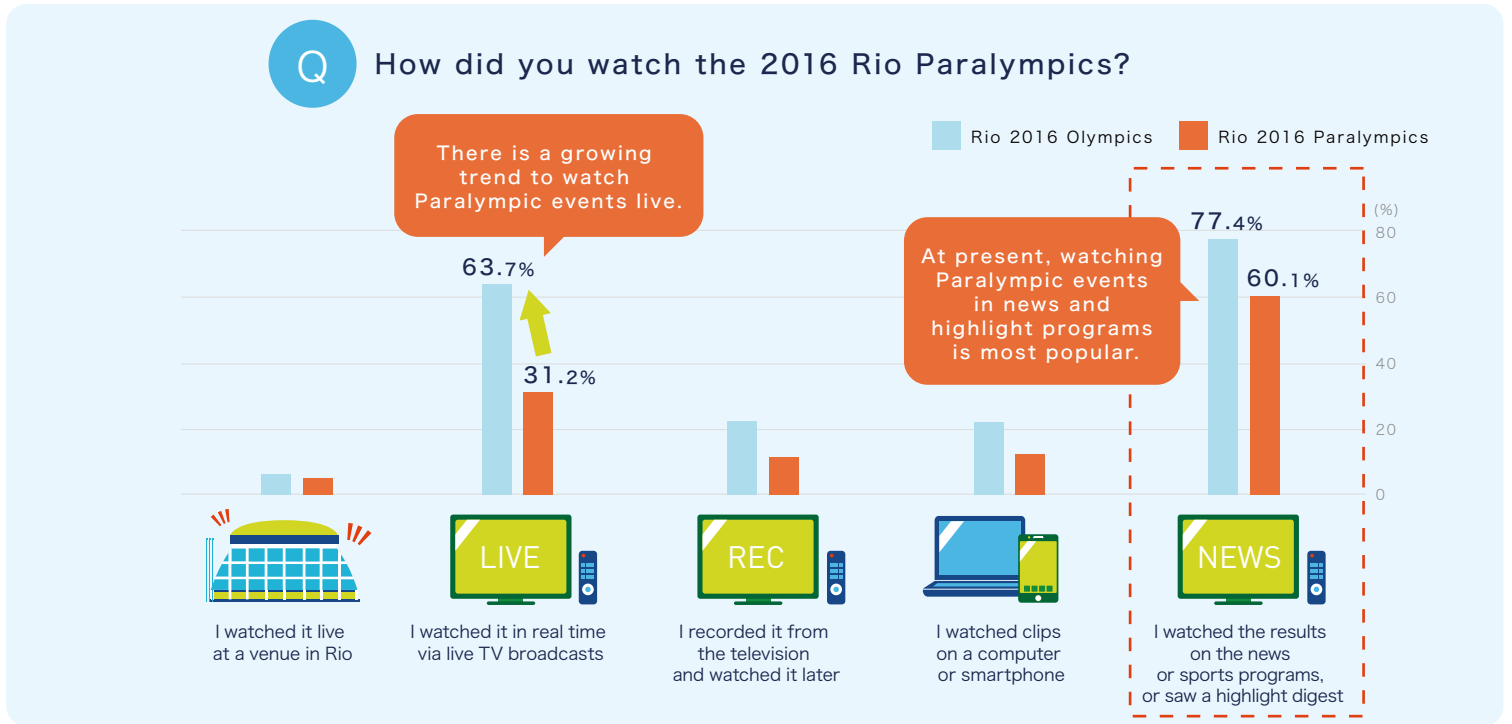
Q How much of the Olympic and Paralympic Games did you watch at the venue, on television, or using digital or some other media?



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## At present, people mostly watch the Paralympics on the news or as Games highlights.

When asked how, in Japan, they had watched the 2016 Rio Paralympics, 31.2% of the respondents said they had watched in real time, on television or using some other device. That is about half the number who said they had watched the Olympics. Further, 60% said they had not watched those Paralympics at the venue or in a live TV broadcast, but had seen highlights on the news or in digest programs. During the 2020 Tokyo Olympics, those polled will have the chance to go to the venue or watch events live on television. Thus, the number of people watching the Paralympics may increase to the level of those watching the Olympics.



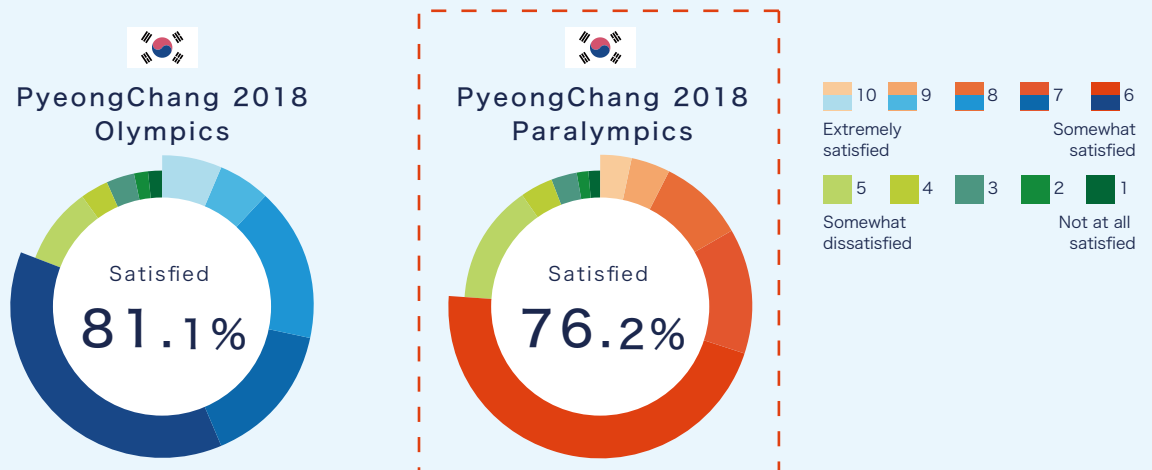
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## Some 80% of respondents said they were equally satisfied with what they had watched of the Paralympics and Olympics.

Of those who had watched these events, 81.1% said they were satisfied with what they had seen of the Olympics, 76.2% said the same of the Paralympics, and about 80% said this about what they had seen of both events. Despite the slight difference in the percentages, there was no difference in respondents' levels of satisfaction after they had viewed either or both Games.

Q

**Are you glad you watched the 2018 PyeongChang Olympics and Paralympics? Rate your degree of satisfaction out of 10 (with one indicating little satisfaction and 10 complete satisfaction).**



## 4 More reasons were given for enjoying the Paralympics than the Olympics.

When those who were highly satisfied with the 2018 PyeongChang Paralympics were asked their reasons, in addition to being “impressed by the drive displayed by the athletes,” they expressed positive opinions regarding the media and TV programs that covered the Paralympics. They also noted that “the commentary was detailed and easy to understand” and “the programs’ coverage was good.” The reasons given for satisfaction with the Olympics roughly reflect the following:

- Differences in amount of media exposure.
- Differences in familiarity with athletes and events.
- Participation by Japanese athletes.

Meanwhile, various reasons have been given for satisfaction being derived from watching the Paralympics, rather than the Olympics. They include the fact that the public are being exposed to interesting media accounts of athletes’ lives, as well as reports of their sports-related achievements and training progress.



If you were highly satisfied with what you saw of the 2018 PyeongChang Olympics and Paralympics, what is the reason?



### Reasons for Satisfaction with the 2018 PyeongChang Paralympics

Responses included the drive displayed by the athletes and media coverage.



Seeing them **try hard and not give up** made me realize I also need to try harder, which was a positive influence. (Female, teen)



I remember being very moved by the struggle of these athletes who did not seem to be “disabled,” and **I got a sense of how wonderful sports are and of their appeal.** (Male, 20s)



**The coverage of the athletes in the Paralympics was better.**  
The Olympic coverage focused too much on certain athletes. (Female, 50s)



**I learned a lot watching events I had never seen before.** (Female, 20s)



**The commentary was detailed and easy to understand** for events with which I was not familiar. (Male, 40s)



### Reason for Satisfaction with the 2018 PyeongChang Olympics

Three main themes stand out: **Media exposure, athlete recognition, and the athletes’ performance.**

#### Difference in amount of media exposure



There was very little Paralympic TV coverage, but I was able to watch **nearly the entire Olympics live on television.** (Female, 50s)



I felt there was very little live coverage of Paralympic events. I guess if you don’t watch it live, you can’t get excited about it. (Male, 50s)

#### Differences in athlete and event recognition



My sense is that the Olympics are much better known and a major sporting event. And, in information from the news and other sources, **there were many people I had heard of before, making the Olympics seem more familiar.** (Male, 50s)



#### Japanese athletes’ performance

**I watched many events** in which Japanese athletes participated. (Female, 50s)

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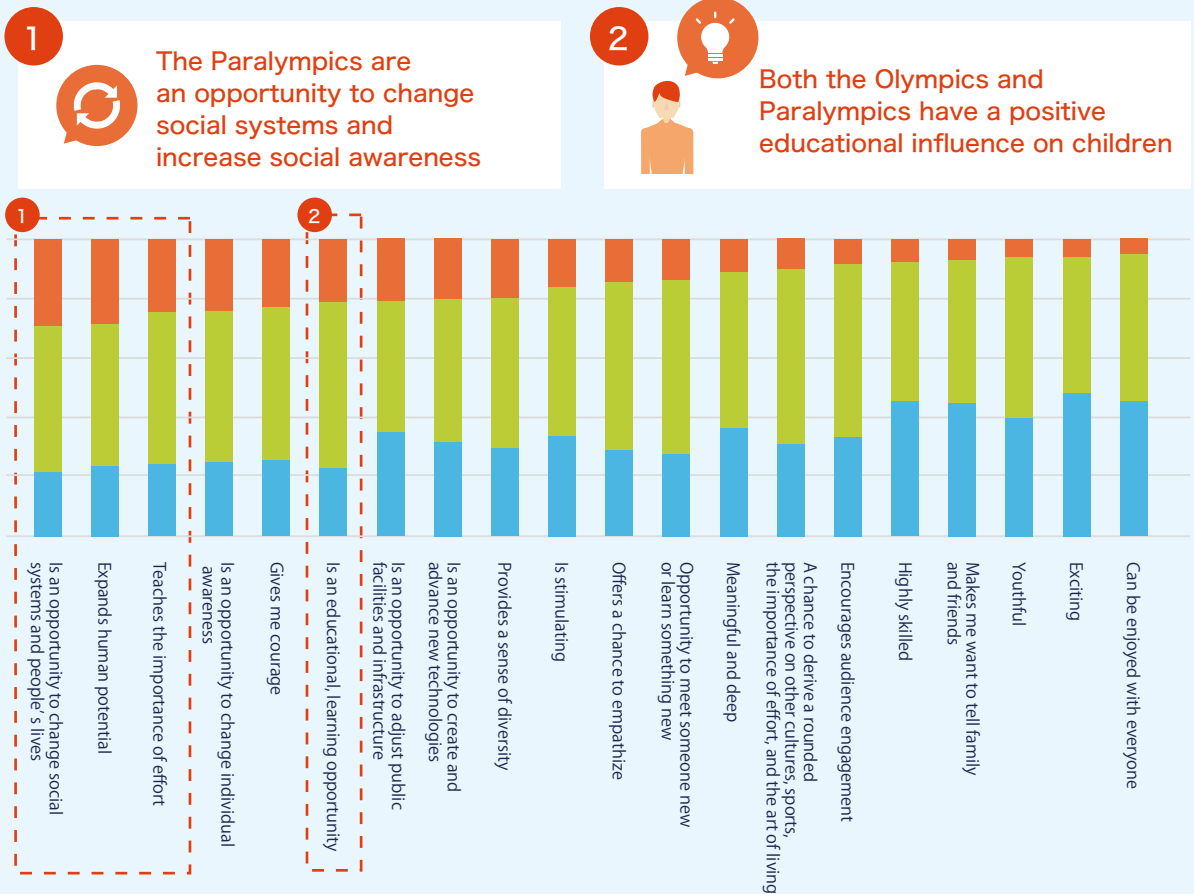
# The Paralympics are perceived as an opportunity to bring about social change.

We compared the image and values associated with the Olympics and Paralympics. The latter scored higher in terms of being perceived as an opportunity to: · Change social systems and people's lives (29.3%) · Expand human potential (28.8%) and · Teach the importance of effort (24.6%) In addition, many people see the Paralympics as an opportunity to boost social awareness. Nearly 60% of the respondents indicated that both the Olympics and Paralympics provide: · Educational and learning opportunities for adults and children · A chance to empathize · An opportunity to meet new people or learn something new · A chance to derive a rounded perspective on other cultures, sports, the importance of effort, and the art of living · Encouragement for audience engagement

The most frequently expressed views regarding the Paralympics are, "gives people with disabilities hope (something to aim for)" at 72.6%; "conveys the appeal of sports" at 53.0%; and "contributes to raising national awareness" at 52.6%. The most common image of the Paralympics appears to be as a chance to raise awareness and bring about change in people and the world.



Which of the following describes the image and values you associate with the Olympics/Paralympics?



Which of the following reflects your views on the Paralympics?



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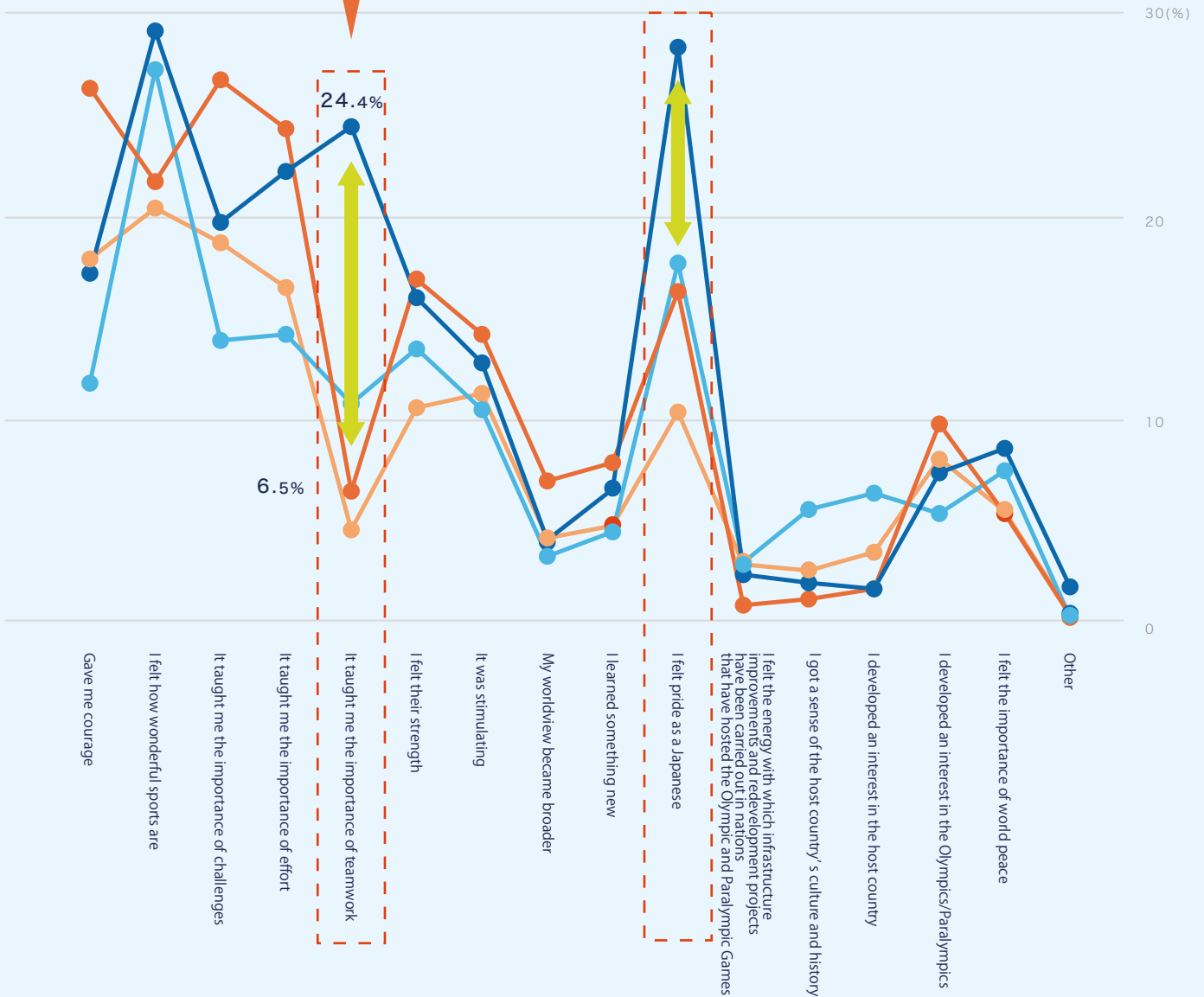
# Weak image in terms of both teamwork and the athletes representing Japan is an issue.

Comparing differences in the feelings of people who watched the Olympics and Paralympics, the Paralympics scored higher in the “gives me courage” and “taught me the importance of challenges” categories. Meanwhile, there were major differences between the Olympics and Paralympics in terms of “taught me the importance of teamwork” and “made me proud to be Japanese” categories. Boosting popular interest in the Paralympics as representing team sports and instilling awareness that some of the participating athletes represent Japan remain issues facing the Paralympics.



Having watched the Olympics and Paralympics, how did your feelings change?

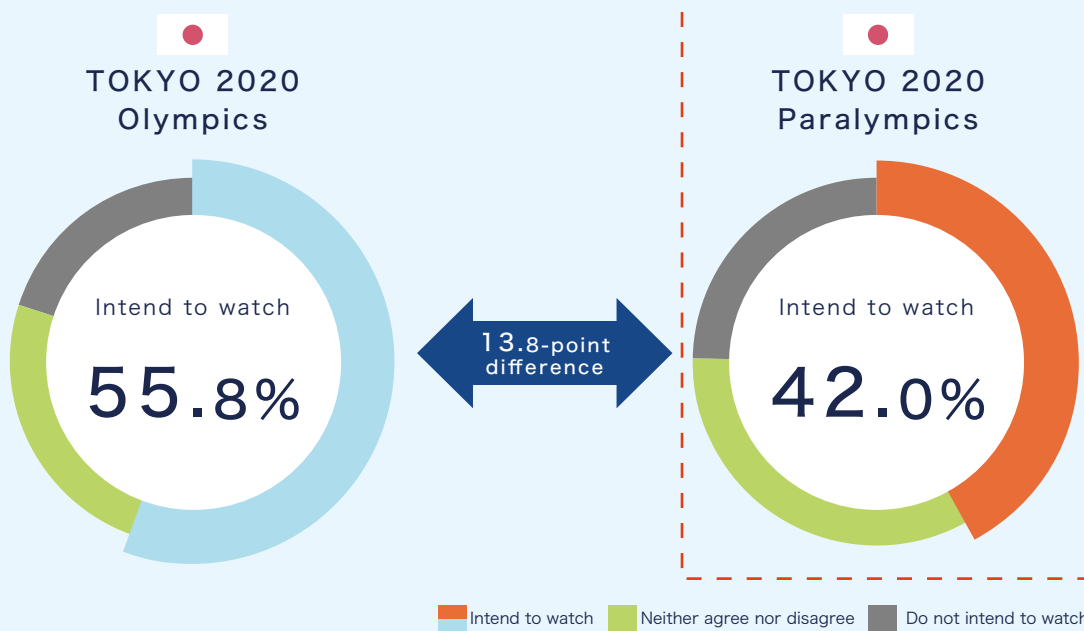
■ Rio 2016 Olympics 
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 ■ PyeongChang 2018 Olympics 
 ■ PyeongChang 2018 Paralympics



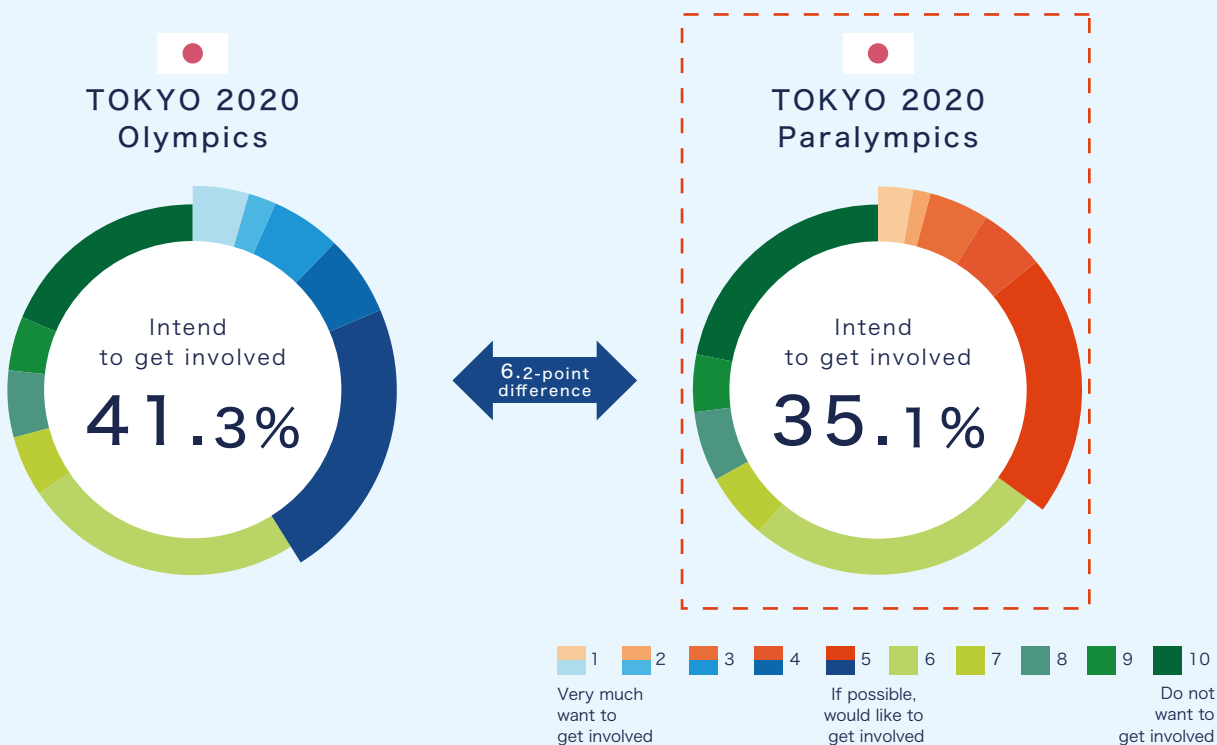
# 7 Respondents shared their plans regarding the 2020 Tokyo Paralympics.

Some 42% of respondents said they want to watch and 35.1% they want to become involved. While the number of respondents who said they want to watch the Paralympics was 13.8 points lesser than the number of those who said they prefer to watch Olympics (55.8%), there was only a 6.2-point difference in the number of respondents who said they want to become involved with the Olympics (41.3%), rather than the Paralympics. That said, the Paralympics stand out in that not only did many respondents indicate they want to watch, but a large number said they want to get involved in the games.

Q Do you want to watch the 2020 Tokyo Olympics and Paralympics?



Q Do you want to get involved with the 2020 Tokyo Olympics and Paralympics?



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# Expectations of involvement are high among the young.

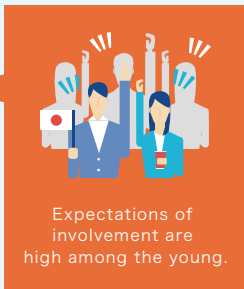
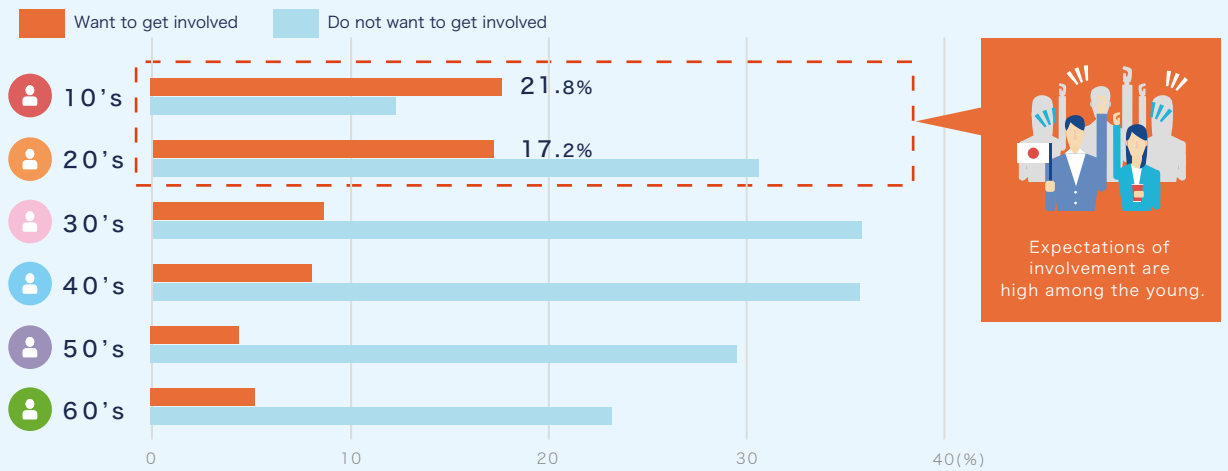
When asked why they want to be involved with the 2020 Tokyo Paralympics, perspectives differed by generation.

- Teenagers anticipate the potential for meeting new people and learning new things.
- People in their 20s tend to seek exciting competitions that are “fun to watch” and “fun sports”.
- People in their 30s expect excitement when it comes to watching sports that are “fun to watch” and “provide excitement”.
- People in their 40s expect involvement will provide excitement and fun, as they indicated by ticking boxes with the wording, “provide excitement” and “are impressive and enjoyable to watch”.
- People in their 50s see social significance in the event and “believe support will encourage athletes to try harder”.
- People in their 60s expect to be encouraged by athletes’ performance that is “impressive and enjoyable to watch”.



## Do you want to get involved with the 2020 Tokyo Paralympics?

### By age



## Did anything in particular make you want to get involved with the 2020 Tokyo Paralympics?

### By age



\* Tied in 3rd and 4th places for those in their 30s



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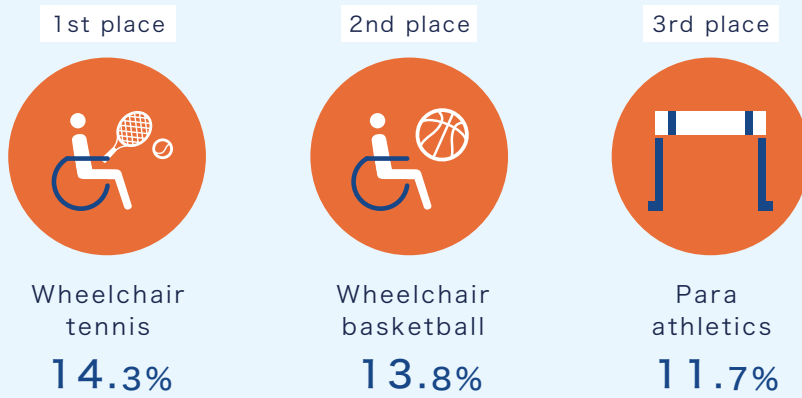
While wheelchair tennis is considered the most popular sport by all age groups, indications are that other events may take the lead among some age groups.

The events people want to watch most at the 2020 Tokyo Paralympics are: 1. Wheelchair tennis (14.3%), 2. Wheelchair basketball and 3. Para athletics. That said, many people in their 60s indicated their interest in a wide range of well-known events, including table tennis, Para swimming, Para athletics, judo, boccia, and wheelchair tennis. People in their teens and 20s indicated interest in shooting Para sport events, canoeing, taekwondo, equestrian events, and wheelchair rugby.

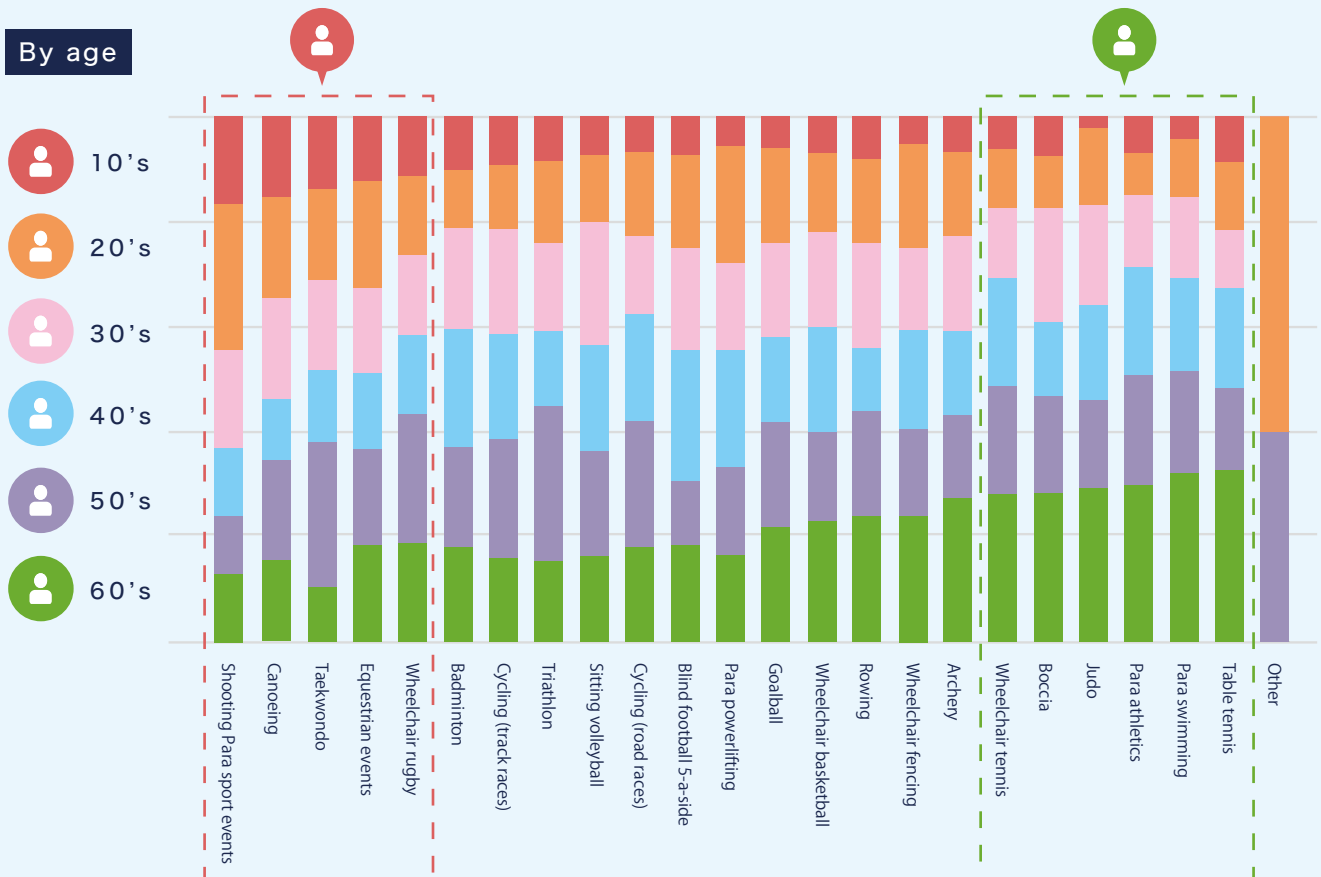


What events scheduled for the 2020 Tokyo Paralympics do you want to watch?

### Top Three Events People Intend to Watch



What events scheduled for the 2020 Tokyo Paralympics do you want to watch?



The Paralympics will provide not only the fun and emotional highs expected of all sports, but also an opportunity to change society and people as the number of those watching and becoming involved with the Games increases.

The 2020 Tokyo Paralympics are two years from now. People who have never before watched the Paralympics will be watching Para sports either at venues or their live coverage in the run-up to the Games. This will lead to a broader understanding of Para sports and boost popular interest.

Survey method	Internet survey
Extractive frame (a system used to obtain answers to questions)	Mighty Monitor (the Internet surveillance monitor operated by Intage Inc., a Japan-based marketing research and services company)
Survey area	Nationwide
Survey targets	Men and women aged 15-69
Excluded from survey	Those involved in mass communications, advertising, and market research
Response objectives /cell setting conditions	There were 3,000 respondents, divided according to gender/age/area
Survey period	March 23-26, 2018
Survey conductor	INTAGE Ink.