

2022

ANNUAL INDUSTRY REPORT

 RunSignup





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Intro and Methodology

Tens of millions of people participate in endurance events in the United States each year, and across the country, people dedicate their lives and earn their livelihoods from the creation of those events. Despite the size of the industry, there is no single aggregator of data for endurance events, and insight into the state of the market has remained elusive.

We mine RunSignup data annually to generate an overhead view of the endurance market. While specific facets of our technology and business model may impact some of the results, our large sample size makes it a robust source of information about the current state of the industry. In any instance where we believe the particulars of our platform may make our results different from the broader market, that is indicated in the description of the data. With our comprehensive data source, estimated to be around 35-40% of the US market, we are able to identify trends and provide recommendations to keep endurance events competitive in a crowded market. In this report we quantify and explore:

- **The rate and trajectory of COVID-19 recovery**
- **Shifts in event types and participant demographics**
- **Patterns in participant registration**
- **The success of promotional strategies**
- **Trends in event fundraising**
- **The impact of technology on race day**

Throughout this report, our statistics come from RunSignup registration and results data. The sample includes events with more than 2 people registered, including both imported and paid registrations. In order to aggregate the data for publication in early 2023, the dates shown are not a direct calendar year; rather, they cover December 1 (of the prior year) through November 30 of the stated year. Any exceptions in time range are noted.

The Return of Races

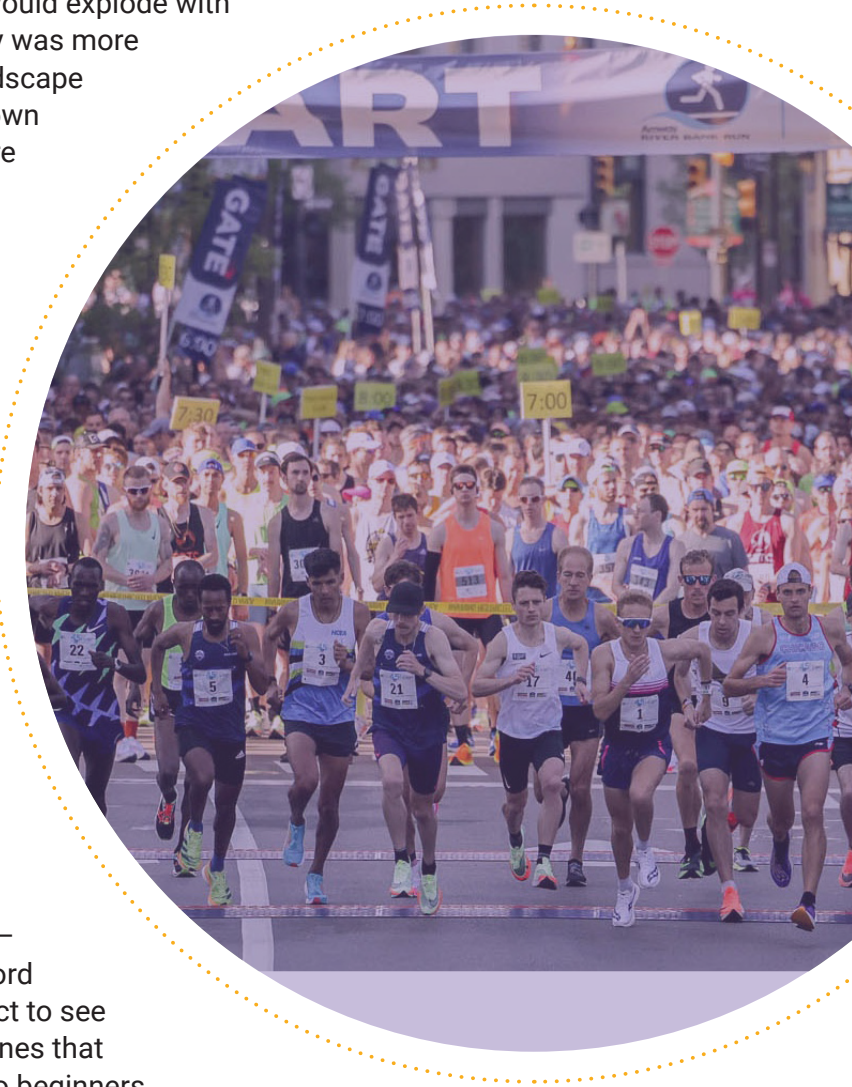
Entering 2022, optimism was high that events would explode with enthusiasm after the pandemic lows. The reality was more subdued: races are very much back, but the landscape of events *has* changed. Many races that shut down in 2020 or 2021 will never return, large events are struggling to reach previous participation rates, and prices have increased. Still, the gradual progress throughout the year suggests that 2022 was a success, if a slow one, and that more regrowth is coming.

What's next? With a high churn rate over the last few years and per-race participation still 10% below 2019 levels, there's room for expansion in the industry in 2023. Look for energetic race directors and timers to take advantage of the lighter racing schedules with new concepts and fresh ideas. The lessons of the pandemic – be nimble and unafraid to try new ideas – should help to create a new blueprint for events.

Two key challenges may determine the success of the industry in the coming years: attracting younger runners, and reaching the new runners – the people who are buying running shoes in record numbers, but not showing up to races. We expect to see success from events that reach those groups: ones that are inclusive of a range of runners, welcoming to beginners, encouraging of social participation, and supportive of charities.

Technology is changing, too, with new tools to automate emails, distribute race photos, make race day registration and check-in faster, and allow for faster training of new timers. Racing is traditionally a slow-changing industry, but races will need to adapt to newer technologies to keep up with recent trends.

Heading into 2023, we are cautiously optimistic that the endurance industry will continue to stabilize and even grow. It's a slow and steady marathon, not a mile sprint.



Data Set

These numbers represent all the events and registrations on RunSignup between 2018 and 2022, with a year defined as 12/1 of the previous year through 11/30 of the stated year. Because the RunSignup platform has increased market share over that period, growth in the overall data set cannot be taken as a representation of growth across the industry.

For a look at year-over-year participation growth or decline between the same cohort of events, see section 1.1. These charts should be used simply to gain a better understanding of the data that was analyzed.

Events on RunSignup

Event Type	2018 # Events	2019 # Events	2020# Events	2021 # Events	2022 # Events
Overall	42,738	49,671	46,893	59,885	68,720
5K and less	23,731	27,716	24,407	30,140	35,664
10K and less	4,022	4,671	5,046	6,142	6,777
Half Marathon and less	2,571	2,974	3,572	4,091	4,420
Marathon and less	1,036	1,233	1,640	1,971	2,151
Ultra	853	1,073	2,256	2,585	2,572
Triathlon	1,205	1,343	956	1,518	1,823
Unknown	9,320	10,661	9,016	13,438	15,313

With no sole aggregator of event data in the US, there is not a precise determination of the scope of the market. However, from our best pre-pandemic analysis of data from Running USA (reported 18.1 million registrations in 2019), online race calendars, and worldwide endurance

industry estimates from Eventbrite, we estimate the pre-COVID US market to be in the range of 22-30 million registrations. In 2022, we do not believe that the market has fully rebounded to its previous size.

Registrations on RunSignup

Event Type	2018 # Registrations	2019 # Registrations	2020 # Registrations	2021 # Registrations	2022 # Registrations
Overall	6,177,666	7,312,022	4,713,380	6,385,666	8,289,112
5K and less	3,715,467	4,580,738	2,677,195	3,810,273	5,103,643
10K and less	826,018	912,394	498,424	691,264	1,003,584
Half Marathon and less	798,872	873,443	564,017	632,755	848,975
Marathon and less	182,903	192,854	151,629	184,004	242,782
Ultra	78,893	109,810	290,792	259,726	227,236
Triathlon	94,842	106,087	36,554	116,272	145,656
Unknown	480,671	536,696	494,769	691,372	717,236

Our best estimation is that the 8,289,112 registrations on RunSignup in 2022 **represents at least 35-40% of the US race registration market.**



Using the RunSignup platform has been a game changer for our organization. It's extremely well thought out, user friendly, customizable, and most importantly, the customer service is superb. Our competitors love it!"

- RUSSELL JACKSON

First Responder Institute



01

The State of the Industry

The State of the Industry

Key Findings and Trends

- While events **grew an average of 16.4% compared to 2021**, the pandemic still had an impact. On average, participation in events was down 10% compared to 2019.
- Small, community races fared better in 2022 than large-scale events. **Races with more than 5,000 participants in 2019 were an average of 18.5% smaller in 2022**, while events with fewer than 500 participants actually grew 3.4%.
- Races are struggling to attract repeat participants to their events, with **just 14.1% of 2022 participants returning from 2021**. That's down from 18.4% in 2019.
- While some market stabilization has occurred, there continues to be a significant churn of events. **19.6% of 2019 events did not take place in 2022**, including 13.6% of events that did not recur in either 2021 or 2022.

Conclusions and Recommendations

- Events are back, but they are facing challenges in reaching participants. Get back to the basics with community engagement and smaller events to rebuild your brand and show newer runners the value of events.
- Traditions have been broken over the last 3 years. Re-engage lapsed participants with loyalty registration programs and targeted discounts. Bonus: use replacement tags to remind your MIA participants of a fun detail about the last time they joined your race.
- After years of over-saturation, there may be room in the racing calendar for new events. Seek out vacated race weekends and replace some of the older, more traditional events with new concepts that are inclusive of new runners and reward families and friends who participate together.

1.1

Participation Rates

The simplistic headline here is that event participation in 2022 was up compared to 2021 and 2020, but still lags a bit behind 2019 levels. To reach that conclusion, we pulled a few different reports that look at events that were on the RunSignup platform in two different years (2022 and either 2021 or 2019). This helps us to better understand the impact on individual events without skewing from new events and platform growth.

2022 Compared to 2021

First up is our annual analysis comparing the number of participants among events that were on our platform in both 2021 and 2022. From this, it's clear that most events were able to grow this year compared to last, with a 16.4% increase in participation for this set of events.

Growth was seen across all distances aside from ultramarathons, where the decrease in virtual challenges (often classified as ultramarathons because they exceed 26.2 miles) in 2022 may be a factor. As the virtual market stabilizes, we expect the ultra data to become more reliable.



Change in Event Participation 2021 to 2022

Event Type	# Events 2021	# Events 2022	# Participants 2021	# Participants 2022	Growth
Overall	40,437	41,413	4,734,413	5,510,735	16.4%
5K and less	20,176	20,908	2,740,143	3,308,476	20.7%
10K and less	4,316	4,366	585,462	699,261	19.4%
Half Marathon and less	2,988	3,024	550,587	638,399	15.9%
Marathon and less	1,433	1,404	153,794	182,538	18.7%
Ultra	1,645	1,571	172,722	160,097	-7.3%
Triathlon	1,242	1,258	101,054	103,372	2.3%
Unknown	8,637	8,882	430,651	418,592	-2.8%

2022 Compared to 2019

In normal years, we do not make a direct comparison of event participation in non-consecutive years. However, the chaotic circumstances of 2020 and 2021 means that our normal look at consecutive years can only tell part of the story. To counter the deficiencies in our 2021-2022 comparison, we also pulled a separate report that looked at participation numbers in 2019 and 2022 for events that were on the platform both years.

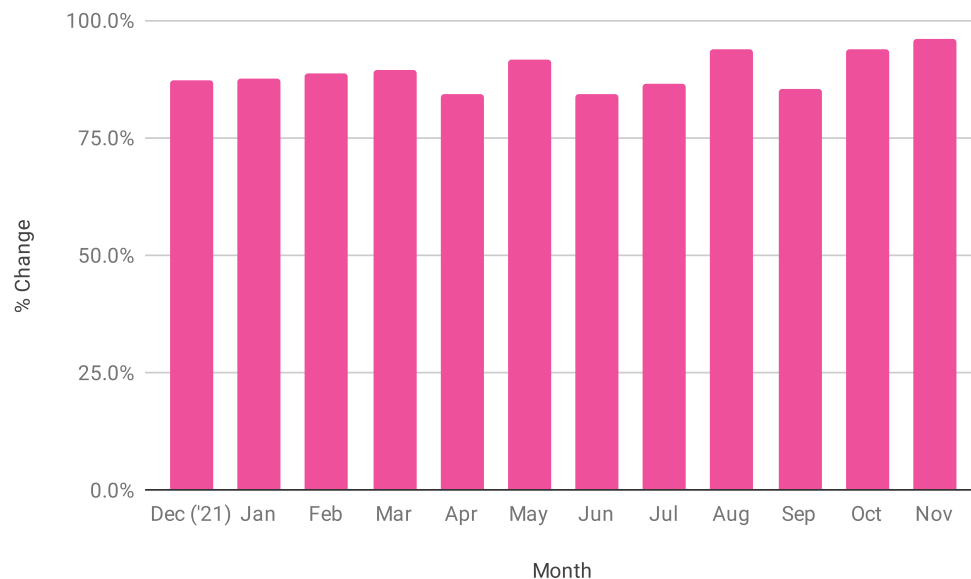
From this, we can see that the effects of COVID-19 on the endurance industry lingered throughout 2022. Overall, races that took place in both 2019 and 2022 had 10% fewer participants this year. There were positive signs at the end of the year, with average participation in August, October, and November down between 4-6%. September's poor performance (down 15%) may be partially attributed to the impacts of Hurricane Ian as rain and wind interrupted races across the east coast.

Change In Event Weekend Participation 2019 to 2021

Month	2019 Participants	2022 Participants	% Change
Dec ('21)	128,927	112,210	-13.0%
Jan	85,353	74,636	-12.6%
Feb	124,941	111,003	-11.2%
Mar	231,873	206,991	-10.7%
Apr	307,696	258,972	-15.8%
May	331,180	303,413	-8.4%
Jun	268,663	225,967	-15.9%
Jul	227,949	197,080	-13.5%
Aug	171,218	160,668	-6.2%
Sep	317,659	270,558	-14.8%
Oct	318,045	298,500	-6.1%
Nov	750,077	718,321	-4.2%
Overall	3,263,581	2,938,319	-10.0%

Note that this report differs from the 2021-2022 report in a few ways: First, it is looking at the numbers from an overall event weekend, regardless of the number of distances or options within the event (I.E., the Richmond Marathon with an 8K, half marathon, full marathon and virtual event in a single event weekend). Second, the matching process on this report is less refined, and it may not include events that were on the platform both years but did not use the renewal function. Lastly, the 2022 report by month only includes events in which the 2019 and 2022 version were held in the same month, omitting some events that may have postponed to a different date within the 2022 calendar year.

2022 Participation Rate Compared to 2019



Change 2019 to 2022 by Race Size

Throughout 2022, reports from our customers indicated that the largest races were struggling the most to achieve full recovery. Our internal Thanksgiving Day numbers backed this up, with races over 1,000 participants showing a drop in participation since 2019 while races under 1,000 participants actually grew.

The challenges for large races appear to be consistent for the entire year, as well, with races over 5,000 participants seeing the largest drop in participation (18.5%). However, mid-range races

(500-5,000) also saw a decline in participation, with only small races of under 500 participants seeing growth on average.

While it's impossible to pinpoint a single reason that large races have been the most impacted, we can identify a few likely contributors. These include: broken participant traditions, staffing challenges for large race teams that faced layoffs in 2020, changes in travel patterns, inflation, and the high cost of flights and hotel rooms for destination races.

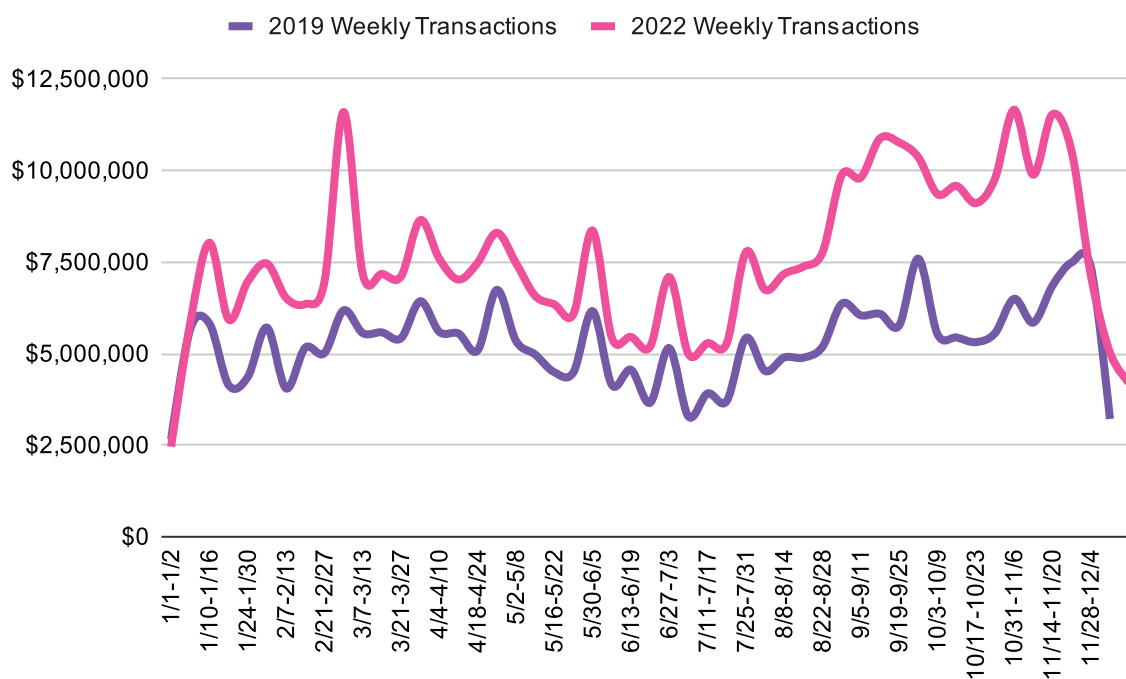
Race Size (in 2019)	2019 Participants	2022 Participants	% Change
Under 500	1,109,449	1,147,204	3.4%
501-1,000	726,779	626,488	-13.8%
1,001-5,000	1,405,592	1,164,547	-17.1%
5,000+	618,648	504,266	-18.5%

Transactions on the Platform

The final piece of data that we looked at was our internal weekly transaction report. This report is affected by new events and increased use of the RunSignup platform and thus does not reflect the experience of an individual event director. However, the report helps give an overview of

the rhythm of recovery in 2022. The overarching pattern is clear: the patterns of registrations over the course of 2022 closely resembled the patterns of 2019, suggesting that our traditional event patterns are resuming.

Weekly Transactions 2019 to 2022



Takeaways

- COVID-19 recovery continued in 2022, with events growing an average of 16% compared to 2021, but races are still struggling to reach pre-pandemic levels. While it currently looks like events are trending in the right direction, keep your expectations conservative as you head into budgeting for 2023.
- Registration rate increases are most common for events with fewer than 500 participants. Keep your focus on grassroots promotion efforts like loyalty programs, referral rewards, community outreach, and pricing incentives.

1.2

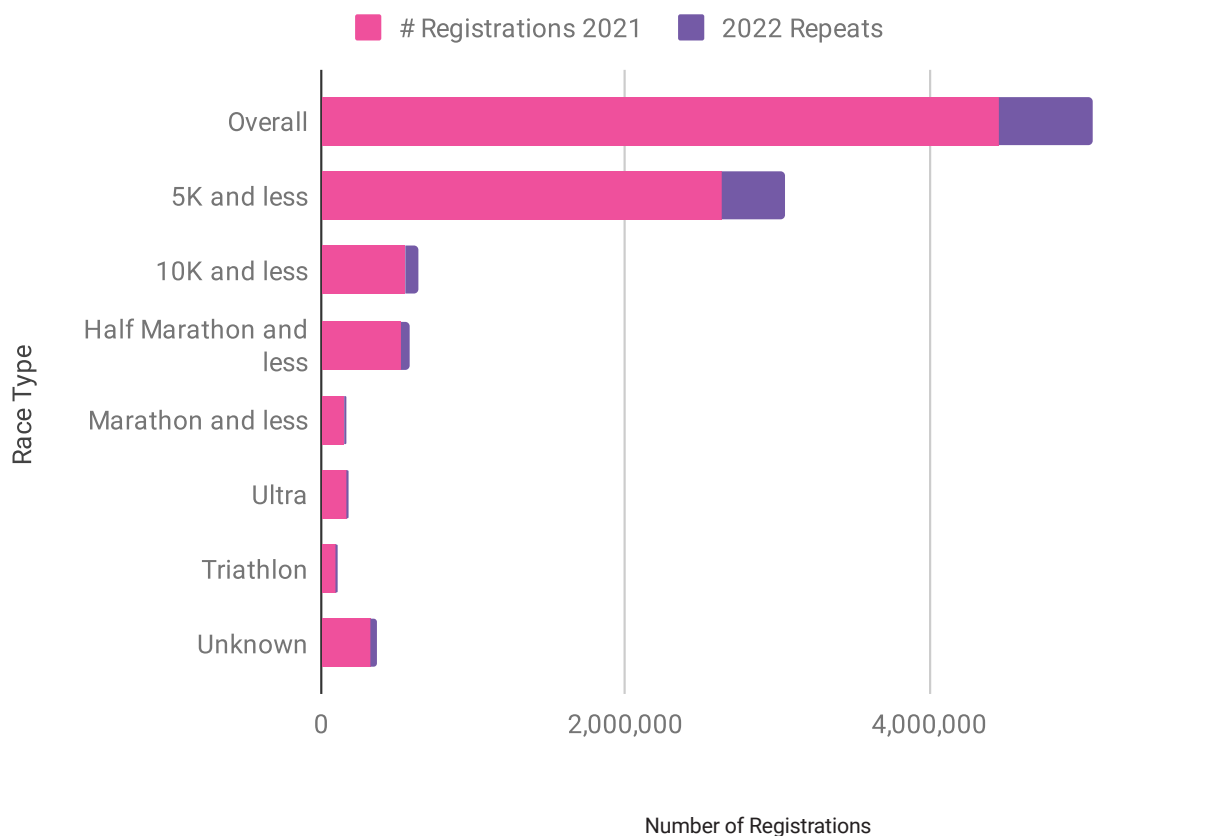
Repeat Participation

This metric looks at how many of your participants from a previous year returned to your event this year. With reduced flip-flopping between in-person and virtual events and general industry stabilization, more participants joined the same event in 2022 than we saw in the previous two years.

However, repeat participation still lags behind the standard we saw pre-pandemic. Perhaps most notable is the change in repeat participation in 10Ks and half marathons, with significantly fewer returning participants in 2022 than we saw in 2018 or 2019.



Repeats as a Percentage of Registrations in 2022



Repeat Participation by Year

Event Type	Repeat % 2018	Repeat % 2019	Repeat % 2020	Repeat % 2021	Repeat % 2022
Overall	18.5%	18.4%	10.1%	12.0%	14.1%
5K and less	17.9%	18.4%	9.9%	12.7%	15.7%
10K and less	24.0%	21.7%	11.9%	13.1%	15.2%
Half Marathon and less	20.3%	19.7%	11.5%	11.0%	10.0%
Marathon and less	14.3%	14.4%	7.2%	9.5%	10.2%
Ultra	13.5%	13.9%	8.1%	6.6%	9.5%
Triathlon	9.1%	8.0%	4.4%	7.9%	6.3%
Unknown	12.4%	13.1%	7.8%	11.5%	12.2%

10% of Half Marathoners Repeated in 2022
while
20% of Half Marathoners Repeated in 2018

Takeaways

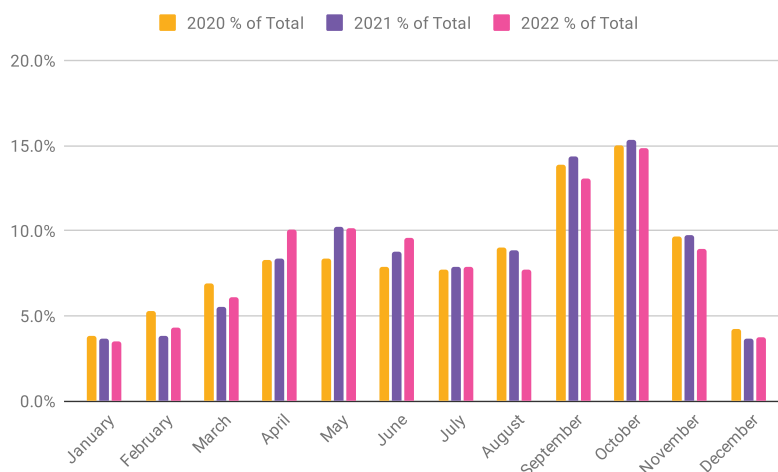
- Reach out to your previous participants – even if they’ve missed a few years. Loyalty programs and reserved entries can help make your previous participants feel like VIPs and bring them back to your event.
- Data from running shoe sales suggests that *running* is up, even while *running events* are down. Add beginner-friendly distances, offer training programs for new runners, and encourage social teams to help ease new runners into your races – and ensure a positive experience that will bring them back again.

1.3

Distribution of Events

The distribution of events in 2022 shifted slightly toward late winter/early spring compared to 2021, when postponements early in the year meant higher than normal participation in the fall.

However, the main patterns remain steady, with October, September, May, and April as the most popular months for racing. Nearly half (48.2%) of all events took place within those four months.



Events by Month

Month	2018 % of Total	2019 % of Total	2020 % of Total	2021 % of Total	2022 % of Total
January	3.2%	2.8%	3.8%	3.6%	3.5%
February	3.7%	3.6%	5.3%	3.8%	4.3%
March	7.2%	7.7%	6.9%	5.5%	6.1%
April	11.4%	9.9%	8.3%	8.4%	10.1%
May	10.2%	10.6%	8.4%	10.2%	10.2%
June	10.4%	10.7%	7.9%	8.7%	9.6%
July	7.6%	7.2%	7.7%	7.9%	7.9%
August	7.7%	8.3%	9.0%	8.8%	7.7%
September	14.5%	13.9%	13.8%	14.3%	13.1%
October	12.0%	12.0%	15.0%	15.3%	14.8%
November	8.9%	9.9%	9.6%	9.7%	9.0%
December	3.2%	3.3%	4.2%	3.7%	3.8%

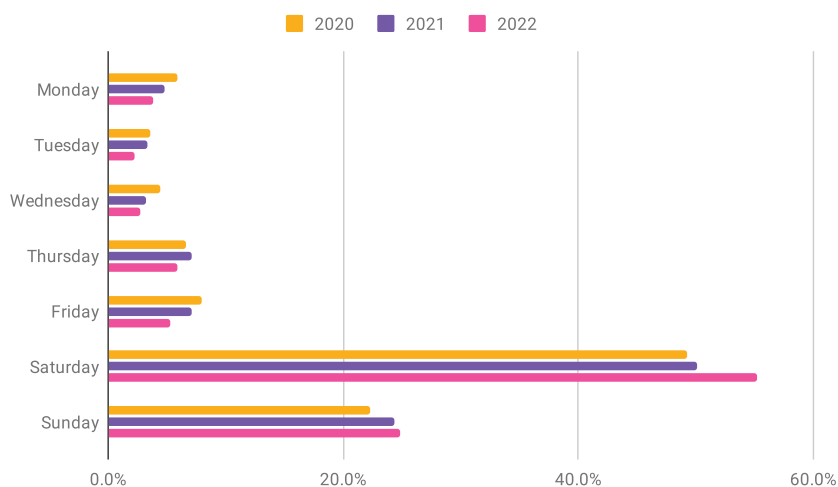
15%
of 2022 Events
Took Place in
October

Events by Day of the Week

Day	2018	2019	2020	2021	2022
Monday	2.5%	2.1%	5.8%	4.8%	3.8%
Tuesday	1.7%	2.0%	3.5%	3.3%	2.3%
Wednesday	3.2%	1.9%	4.4%	3.2%	2.8%
Thursday	4.6%	6.0%	6.6%	7.0%	5.9%
Friday	3.7%	3.8%	8.0%	7.1%	5.2%
Saturday	58.8%	58.6%	49.3%	50.1%	55.2%
Sunday	25.5%	25.4%	22.3%	24.4%	24.8%

55%
of Races Begin
on a Saturday

Weekends continue to dominate the racing scene, with trends showing signs of a return to 2019 patterns after some shifts due to virtual races and challenges. With virtual races and challenges often starting on a specified date instead of day of the week, 2020 & 2021 saw an increase in weekday “races”; however, with virtual participation falling, weekend participation is nearing pre-pandemic percentages.



If an event was multiple days, the day reported is the first day of the event.

Takeaways

- Winter is the clear offseason for races across the country. Take advantage of lack of competition with holiday themed races, indoor events, and races that give your participants “tough conditions bragging rights.”
- Saturdays continue to be the biggest racing days, but we know from earlier data points that some races are not returning. Look for the gaps they left in the schedule for prime racing dates.

1.4

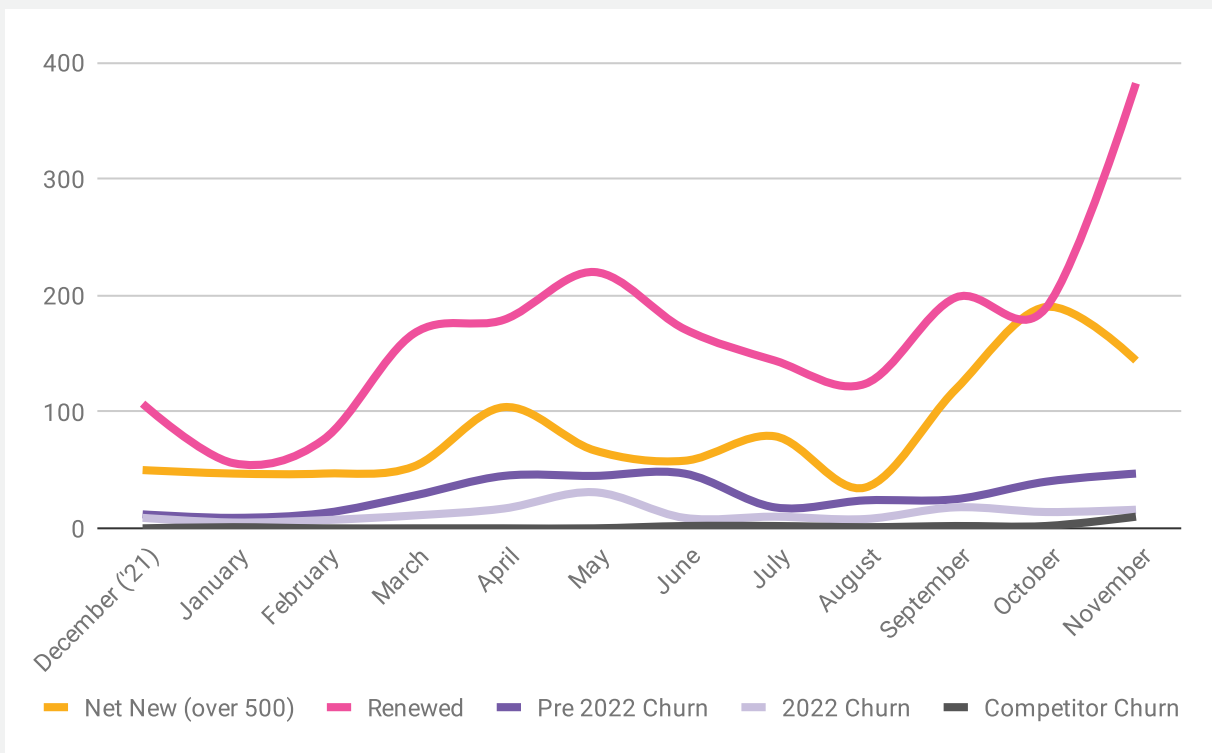
Churn

RunSignup internally tracks *churn*, including both events that do not recur and those that recur but change registration platforms. This allows us to evaluate the health of the industry and determine if there are emerging competitors with strengths we need to match.

Tabulating this report is a highly manual process; as such, this data represents only events over 500 participants that use our platform from year to year. Smaller events are excluded.

Due to the unique nature of event cancellations in 2020 and 2021, we are looking at churn from 2019 to 2022 to learn more about what percentage of races were permanently lost. To do this, we separated churn in which there was no race into two categories: races that did not happen in 2022 or 2021, and races that took place in 2021 but not 2022.

Competitor and No Race Churn 2019-2022 Compared to Race Renewals and New Races



	Total Events Over 500 In 2019	Total Events Over 500 in 2022	Net New Events over 500, 2020-2022	Re- newed (Same Month)	Re- newed (New Month)	Churn: Race in 2021, but not 2022	Churn: No race in 2021 or 2022	Churn: No race in 2021 or 2022	No Event Churn %	Competitor Churn Percent
December ('21)	130	157	50	99	8	9	12	0	16.2%	0.0%
January	71	103	47	48	8	5	9	1	19.7%	1.4%
February	96	123	47	63	13	7	13	0	20.8%	0.0%
March	206	220	53	130	37	11	28	0	18.9%	0.0%
April	241	283	104	148	31	17	45	0	25.7%	0.0%
May	296	287	67	170	50	31	45	0	25.7%	0.0%
June	229	229	58	140	31	9	47	2	24.5%	0.9%
July	183	223	79	131	13	10	18	2	15.3%	1.1%
August	168	159	35	97	27	8	24	1	19.0%	0.6%
September	253	317	119	154	44	18	25	2	17.0%	0.8%
October	256	379	190	161	28	14	40	2	21.1%	0.8%
November	465	526	144	359	23	16	47	10	13.5%	2.2%
Total	2594	3006	993	1700	313	155	353	20	19.6%	0.8%

The overall churn rate for 2019 events that did not recur in 2022 was 19.6%. Of that, 6% were races that happened in 2021 but did not recur this year, whereas 13.6% were races that have not happened since at least 2020. While it's possible that some of those races will return, the further we get from 2020, the less likely we'll see dormant races come back.

The 6% of *newly* lost races suggests some stabilization in the number of races dying each year – in 2018, 7.6% of races did not recur and in 2019 5.9% of races did not recur.

One other key data point that illustrates the ongoing chaos of 2022: 15.6% of the 2019 events that did recur in 2022 were held in a different month than in 2019.

14% of 2019 Races Were Not Held in 2021 or 2022

6% of 2019 Races Were Held in 2021, But Not 2022

Competitor churn has remained low over the last four years with the exception of a race series that acquired a company with their own registration platform. In 2022, competitor churn was just 0.8%.

Competitor Churn 2018-2021

Percent is percentage of events that did recur, but changed platforms

Competitor Losses	2018	2018 %	2019	2019 %	2020	2020 %	2021	2021 %	2022	2022 %	Total
New Events	710		834		1,027		1,320		1,652		5,543
EnMotive	6	0.4%	3	0.2%	38	2.6%	27	4.4%	0	0.00%	74
RaceRoster	4	0.3%	16	0.8%	8	0.6%	9	1.5%	8	0.42%	45
Active	0	0.0%	2	0.1%	6	0.4%	2	0.3%	2	0.11%	12
ItsYourRace	5	0.3%	3	0.2%	1	0.1%	2	0.3%	0	0.00%	11
CT/Athlinks	6	0.4%	1	0.1%	1	0.1%	2	0.3%	1	0.05%	11
Events.com	2	0.1%	3	0.2%	2	0.1%	3	0.5%	0	0.00%	10
Showclix	0	0.0%	8	0.4%	0	0.0%	0	0.0%	0	0.00%	8
RaceWire	5	0.3%	1	0.1%	0	0.0%	1	0.2%	0	0.00%	7
onecause	0	0.0%	6	0.3%	0	0.0%	0	0.0%	0	0.00%	6
Custom	0	0.0%	0	0.0%	5	0.3%	0	0.0%	0	0.00%	5
EventBrite	1	0.1%	0	0.0%	3	0.2%	1	0.2%	0	0.00%	5
RedPodium	2	0.1%	0	0.0%	2	0.1%	1	0.2%	0	0.00%	5
BlackBaud	4	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.00%	4
elitefeats	0	0.0%	2	0.1%	2	0.1%	0	0.0%	0	0.00%	4
RaceEntry	2	0.1%	0	0.0%	1	0.1%	1	0.2%	0	0.00%	4
Vertical Runner	1	0.1%	2	0.1%	0	0.0%	1	0.2%	0	0.00%	4
GetMeRegistered	1	0.1%	0	0.0%	2	0.1%	0	0.0%	1	0.05%	4
Classy	2	0.1%	0	0.0%	1	0.1%	0	0.0%	0	0.00%	3
Haku	2	0.1%	0	0.0%	0	0.0%	1	0.2%	0	0.00%	3
Lightbox Registrations	1	0.1%	1	0.1%	0	0.0%	1	0.2%	0	0.00%	3
Qgiv.com	0	0.0%	0	0.0%	1	0.1%	2	0.3%	0	0.00%	3
RacesOnline	2	0.1%	1	0.1%	0	0.0%	0	0.0%	0	0.00%	3
Other	8	0.5%	8	0.4%	8	0.6%	26	4.2%	8	0.42%	58

In 2022, Competitor Churn was **0.8%**



Takeaways

- It's likely that many of the 13.6% of 2019 races that skipped both of the last two years will not return. If you're looking to grow your race company, this is the time to snap up premium dates on your local calendar. Start small and grow your new events as the industry rebounds.
- Despite improvements, 2022 remained turbulent, with many races not returning and a host of events changing dates. Focus on rebuilding trust in the industry (and your race) to help recreate the sense of tradition that drove registrations pre-pandemic.

1.5

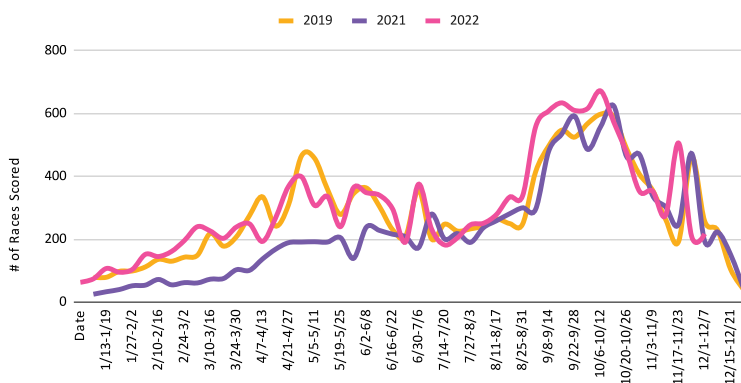
Timing Industry

As the backbone of the endurance industry, timer insights can shed some light on the state of the overall industry. This looks at a combination of scoring data and our annual Timer Market Survey (covered more in section 6) to draw a few conclusions.

Timed Events in 2022

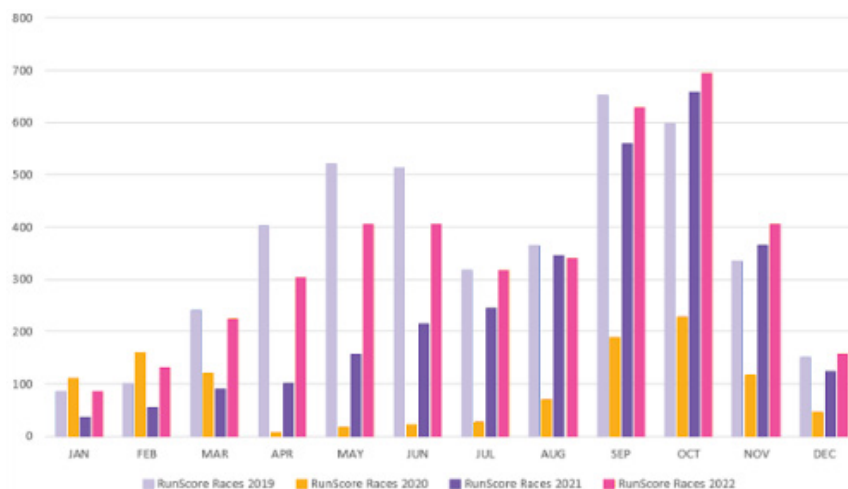
First, we looked at three of the major scoring software providers in the industry to compare the number of events they timed in 2019, 2021, and 2022. We started with aggregate data from The Race Director and the next-generation software RaceDay Scoring. This showed early 2022 looking similar to 2019 while scored events in August-October of 2022 actually exceeded the number in 2019. While it's possible some of that is due to new timers introducing RaceDay Scoring, it's an encouraging sign that in-person races were back in full force throughout the year.

RaceDay Scoring and Race Director Timed Events



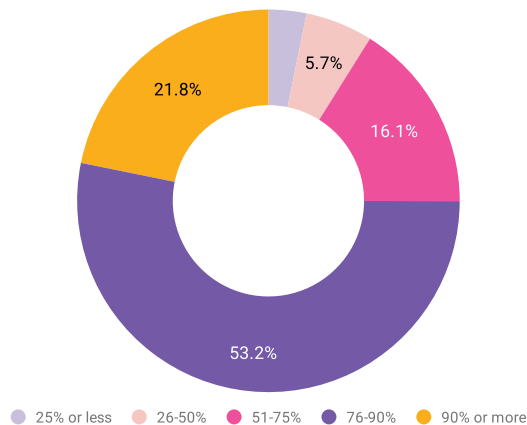
Events scored by RunScore showed a similar pattern, with 2022 events slightly lagging 2019 events early in the year. But by the last three months of the year, RunScore was scoring more events per month than in 2019.

RunScore Scored Events



Timer Perception

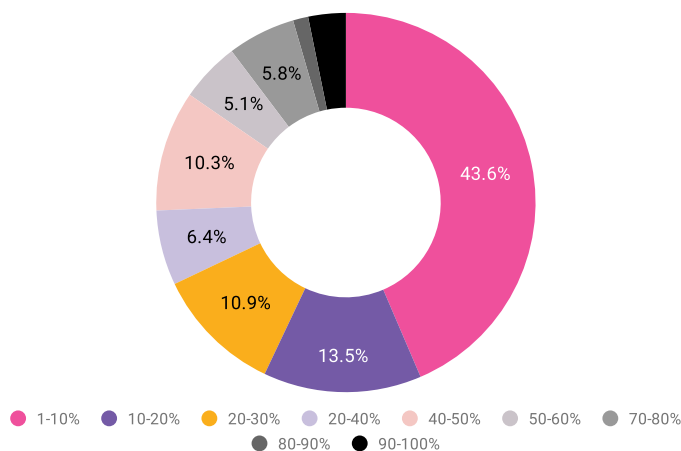
The remaining data for this section is pulled from our 2022 Timer Survey, and is used to evaluate the *perception* timers have of the industry at this moment. For more information about the purpose and methodology of that survey, see section 6.



The responses in this section mirror the findings in 1.1, with 53% of timers responding that their races are filling to 76-90% of their pre-pandemic numbers.

Compared to Pre-Pandemic, What Percentage of Participants Are You Seeing at Your Events?

53% of Timers Report Participation Rates are 76-90% of What They Saw in 2019



What Percentage of Your Events Do You Expect to Continue to Offer Virtual?

The virtual race market may be stabilizing. 44% of 2022 respondents (compared to 34% in 2021) indicated that they expect less than 10% of their races to maintain a virtual option. Just 15% of timers expect more than half their events to continue offering virtual options in 2023.

Takeaways

- By the end of the year, the number of scored races appears to be approaching 2019 levels, indicating a robust return to in-person racing. Races have the opportunity to re-institute themselves as annual traditions as their events become more consistent on the schedule.
- Timers report reduced participation at events throughout 2022. Heading into 2023, timers should be proactive with their clients, providing education and guidance on marketing their race, and caution about budgeting and expectations.



For us, it's about innovation, and it's about having a vision and producing products that will improve the experience for participants. Otherwise, we'd all be using a Google Form with a Paypal button, right? For us, it's about enriching that participant experience and giving them additional touchpoints, additional opportunities, things like RaceJoy and Results. It's about enriching that experience and RunSignup helps us with that".

- ERIC ARNDT

It's Race Time, Inc.



02

Event Trends

Event Trends

Key Findings and Trends

- In-person events have reclaimed the dominant position in the endurance market, with **87.6% of events and 92.8% of participants coming from in-person events in 2022**. Still, the rate of virtual events and participation continues to outpace pre-pandemic levels, when just 1% of participants were virtual.
- The majority of participants across all types of events identified as female, but the gap is smaller for in-person events. In 2022, **53% of in-person participants and 66.7% of virtual race participants were female**.
- While races in 2022 did slightly better at attracting younger runners than in 2022, the precipitous drop in 18-29 year-old participants since the mid 2010's continues to be a concern. In 2022, **13.9% of participants were 18-29, compared to 17.7% between 18-29 in 2018**.
- Major marathons and large marquee events may get most of the news coverage – but the majority of events are small. In 2022, **98.2% of virtual events and 95.4% of in-person events hosted fewer than 500 participants**.

Conclusions and Recommendations

- In-person race experiences should be your priority, but people haven't unlearned the virtual lesson. Providing an option for virtual participation has limited overhead and can help you pick up a few registrations on the margins and engage a wider base.
- Female participants lead the way for races. Make sure you include them in every marketing pitch and provide swag that will align with their style and fit preferences. Want to make your events more inclusive? 0.2% of participants identified as non-binary in the first year with the option available, and that number should increase as more races enable the feature.
- Participation by young Millennials and Gen Z continues to be a concern. Surveys show that those generations are motivated by supporting a good cause and social (rather than competitive) experiences with friends. Focus on social elements like teams and highlight your charity component in marketing for the 18-29 year-old age group.
- When making decisions about your event, don't let your perception be colored by the fate of large, premier events. Look to your peers and your local community to make decisions about financial viability and expected participation numbers.

2.1

Participation by Event Type

While in-person events are once again the default, virtual participation levels remain higher than they were in 2019 and before. More events are opting to increase registrations along the margins by offering virtual options in addition to their in-person events. Virtual challenges continue to maintain their own niche in the market.

Percent of Events by Type

Event Type	2018 % of Events	2019 % of Events	2020 % of Events	2021 % of Events	2022 % of Events
In-Person	97.9%	97.2%	59.8%	74.8%	87.6%
Virtual Race	2.1%	2.8%	33.9%	20.3%	10.5%
Virtual Challenge			6.3%	4.9%	1.9%

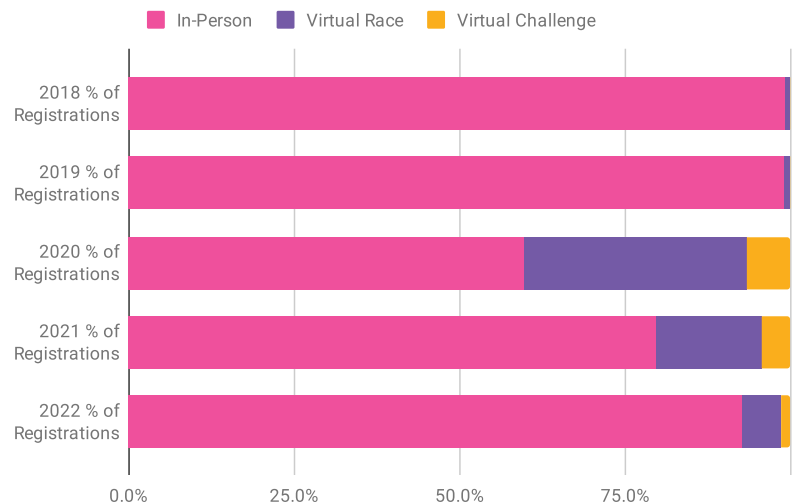
12% of Events in 2022 Were Virtual (or Challenges)
2% of Events in 2018 Were Virtual

Registrations by Event Type

Event Type	2018 % of Registrations	2019 % of Registrations	2020 % of Registrations	2021 % of Registrations	2022 % of Registrations
In-Person	99.2%	99.0%	59.8%	79.6%	92.8%
Virtual Event	0.8%	1.0%	33.4%	15.9%	5.7%
Virtual Challenge			6.7%	4.5%	1.5%

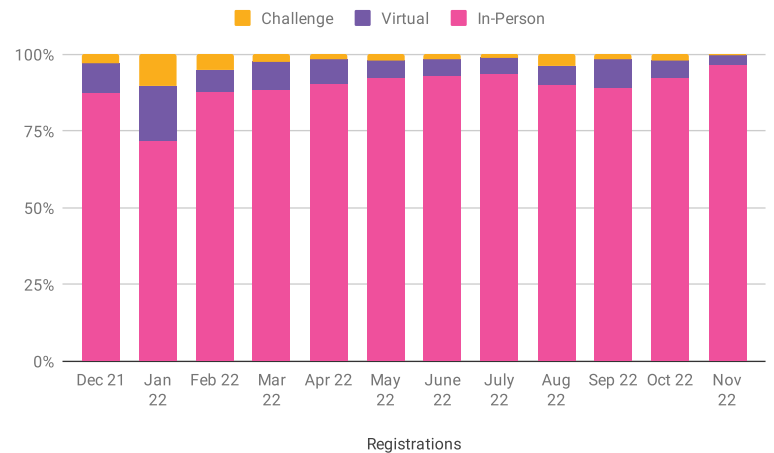
Percent of Registrations by Event Type

Registrations for virtual events and challenges also exceeded pre-pandemic participation while seeing a precipitous drop-off compared to 2020 and 2021. This likely reflects the normalization of virtual participation for those who cannot join in person, while signaling a strong preference for in-person when possible.



Registration Distribution by Month

The most obvious anomaly in virtual participation came in January 2022, when the Omicron variant led to event cancellations and conversions to virtual.



Takeaways

- Participants are choosing in-person events. Make sure the race experience is joyful and engaging to remind them *why* they chose the logistical challenges of joining an in-person event.
- The demand for virtual remains higher than it was before 2020. Keeping a virtual option alongside your in-person event can help increase registrations on the margins, provide a backup for participants who can't join in person, and make for easy transfers to virtual options if the in-person event is forced to cancel.
- If you're offering a virtual-only event, it needs to stand out. A fun (and new) theme, premium swag, or a personalized experience like a virtual challenge with regular milestones and rewards are necessary to interest participants in virtual options in 2023. Strong digital marketing skills may also be required to attract a large audience to a virtual-only event.

2.2

Participant Demographics

The participant gender breakdown in 2022 looked similar to most of the previous five years. While 2020 saw a large increase in the percentage of participants who identify as female, the

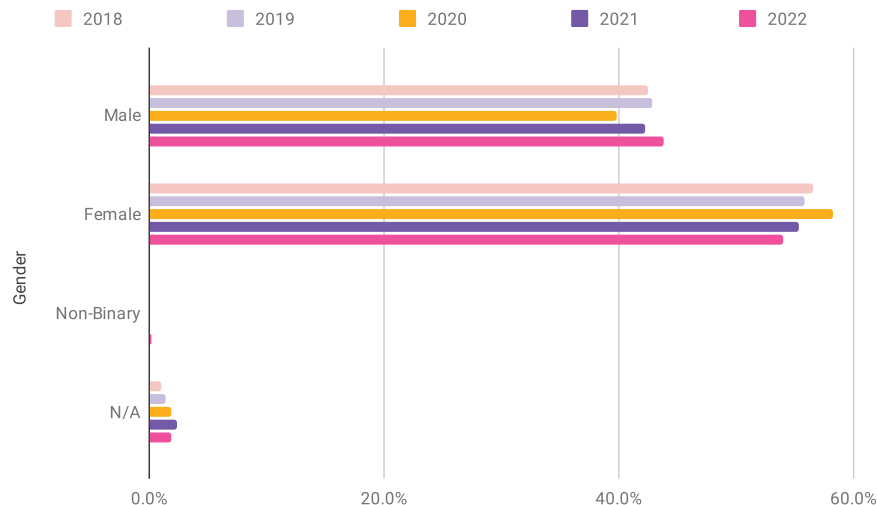
numbers from the last two years suggest that was an anomaly. Still, the majority of participants throughout 2022 were female, at 54%.

Overall Participation by Gender

Gender	2018 % of Total	2019 % of Total	2020 % of Total	2021 % of Total	2022 % of Total	% Change 2019-2022	% Change 2021-2022
Male	42.5%	42.8%	39.8%	42.2%	43.9%	2.3%	3.8%
Female	56.5%	55.8%	58.3%	55.4%	54.1%	-3.1%	-2.5%
Non-Binary					0.2%	-	-
N/A	1.0%	1.4%	1.9	2.4	1.9%	38.3%	-26.3%

With changes to the gender options on RunSignup, this year is the first year that these reports includes a non-binary category. The initial number is small but meaningful (0.2%), especially as the feature is new and many races have not yet enabled it. Additionally, the 2% of participants who

did not select a gender indicates that we continue to see both races that do not require gender (often virtual events) or bypass the system's gender collection and add their own custom question with additional gender identities.

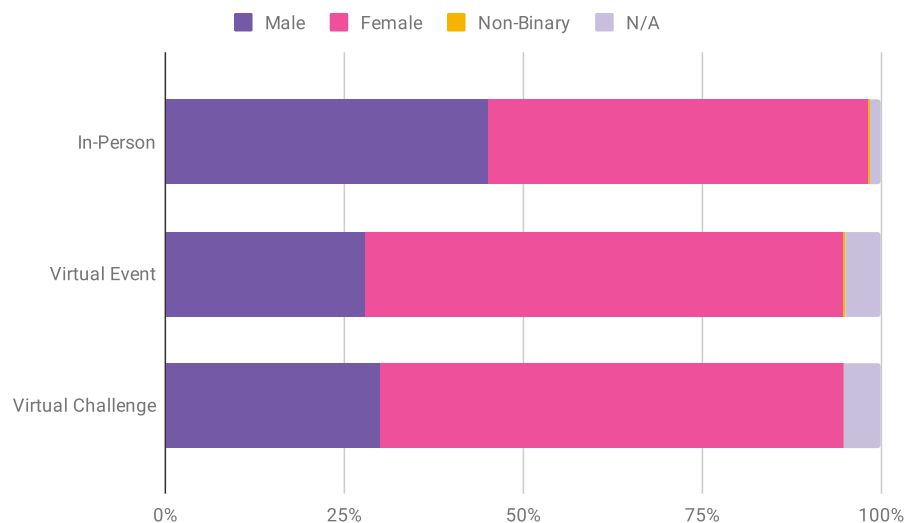


54% of 2022 Participants Identified As Female
0.2% of 2022 Participants Identified As Non-Binary

Gender by Event Type

Female participation continues to exceed male participation in every type of event, but the discrepancy is most glaring in virtual events. While a slight majority (53.1%) of in-person participants identify as female, 66.9% of virtual race registrants and 64.7% of virtual challenge registrants are female. Virtual races and challenges are also most likely to not require a gender, with 5% of virtual challenge and virtual race registrants not identifying a gender.

Gender	2020 Virtual Challenge	2021 Virtual Challenge	2022 Virtual Challenge	2020 Virtual Race	2021 Virtual Race	2022 Virtual Race	2020 In-Person	2021 In-Person	2022 In-Person
Male	32.6%	29.0%	30.0%	33.7%	30.6%	27.9%	44.0%	45.3%	45.1%
Female	65.3%	63.3%	64.7%	63.6%	65.1%	66.9%	54.5%	53.0%	53.1%
Non-Binary			0.1%			0.1%			0.2%
N/A	2.1%	7.7%	5.2%	2.7%	4.3%	5.0%	1.4%	1.7%	1.7%

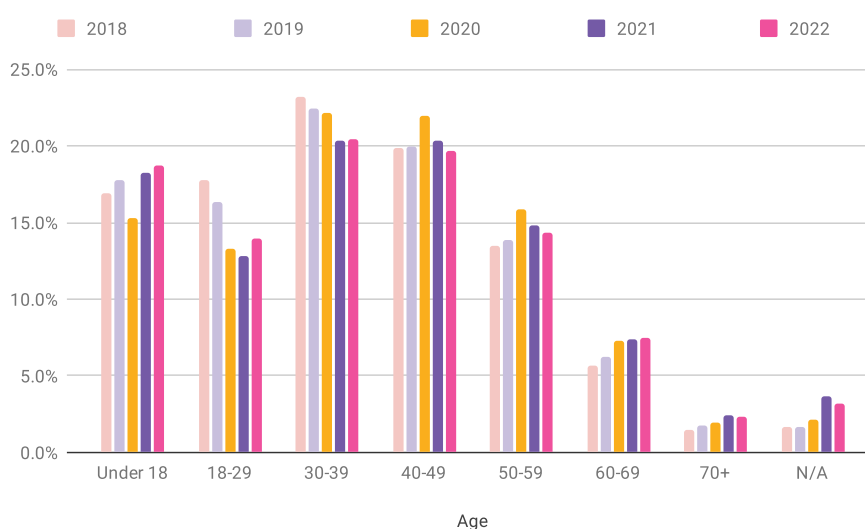


70% of 2022 Virtual Race Participants Identified as Female

Overall Participation by Age

Age	2018 % of Total	2019 % of Total	2020 % of Total	2021 % of Total	2022 % of Total	% Change 2019-2022	% Change 2021-2022
Under 18	16.9%	17.8%	15.3%	18.3%	18.7%	4.9%	2.2%
18-29	17.7%	16.4%	13.3%	12.8%	13.9%	-14.8%	8.4%
30-39	23.2%	22.4%	22.2%	20.3%	20.5%	-8.5%	0.7%
40-49	19.8%	19.9%	22.0%	20.3%	19.7%	-1.4%	-3.4%
50-59	13.5%	13.9%	15.8%	14.8%	14.3%	3.0%	-3.5%
60-69	5.7%	6.2%	7.3%	7.4%	7.4%	19.6%	0.1%
70+	1.5%	1.7%	2.0%	2.4%	2.3%	32.1%	-4.8%
N/A	1.7%	1.7%	2.1%	3.6%	3.2%	93.1%	-13.5%

After several years of concern over steadily falling rates of participation from young adults, 2022 saw a slight reversal of the trend. 14% of all participants were between 18-29, about a 1% increase compared to 2021. Still, the percentage of participants under 30 continues to lag significantly behind the endurance event industry's peak rates of participation in the mid-2010's. Perhaps the biggest challenge facing race directors is expanding the pipeline of young endurance event participants.



14% of 2022 Participants Were 18-29
while
18% of 2018 Participants Aged 18-29

Age by Event Type

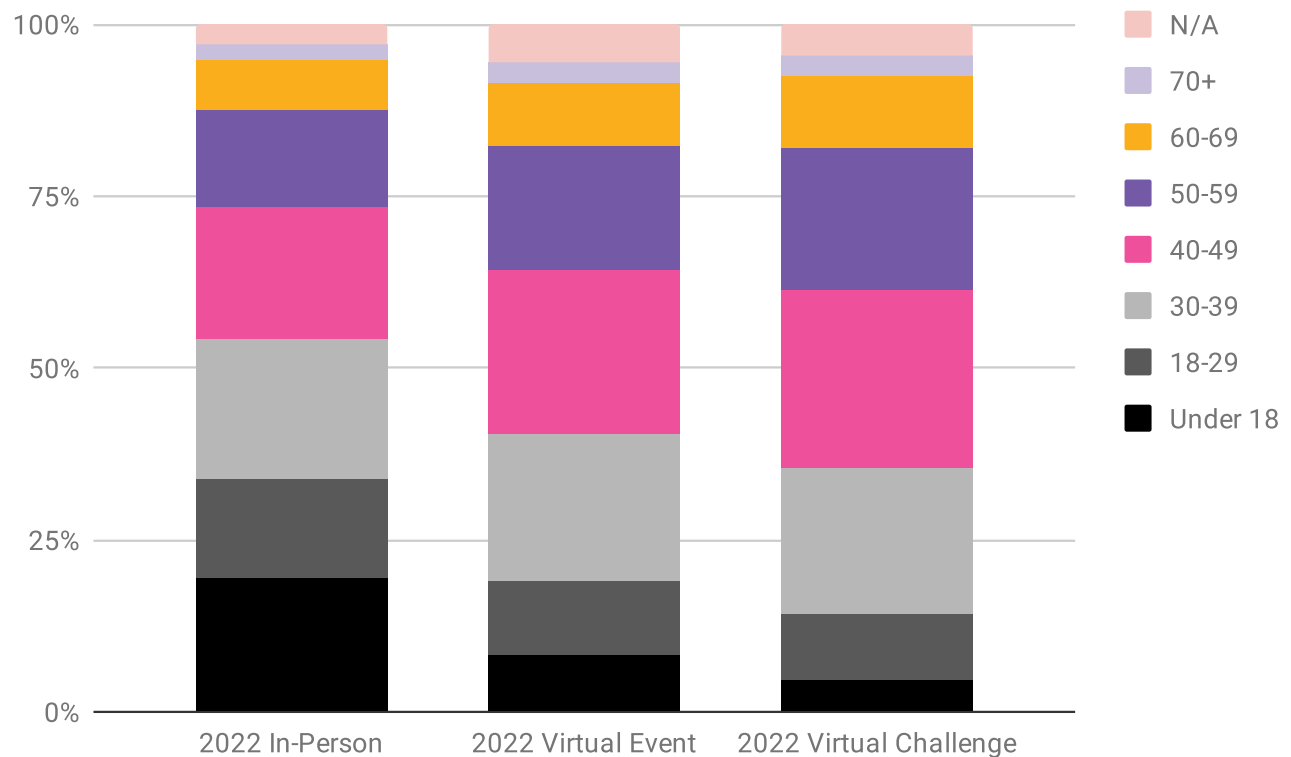
Age also appears to impact the event type that participants choose. Runners over 50 make up a larger share of participants in virtual events and challenges than they do for in-person events, while participants under 30 are much more likely to opt for an in-person event.

Multiple factors likely play a role in this trend, including the in-person risks for older adults, confidence participating in competitive events, and the desire to participate in social activities with family and friends.

Age	2020 Virtual Challenge	2021 Virtual Challenge	2022 Virtual Challenge	2020 Virtual Race	2021 Virtual Race	2022 Virtual Race	2020 In-Person	2021 In-Person	2022 In-Person
Under 18	8.0%	8.2%	4.9%	11.5%	10.5%	8.4%	18.3%	20.4%	19.5%
18-29	11.9%	9.5%	9.4%	13.2%	11.6%	10.6%	13.5%	13.2%	14.2%
30-39	23.7%	20.4%	21.2%	22.3%	21.9%	21.5%	21.9%	20.0%	20.4%
40-49	25.6%	24.8%	26.0%	22.7%	23.4%	23.9%	21.1%	19.5%	19.3%
50-59	18.0%	19.2%	20.6%	16.8%	17.3%	18.0%	15.0%	14.1%	14.0%
60-69	8.2%	9.6%	10.5%	8.3%	8.7%	9.1%	6.7%	7.0%	7.3%
70+	2.0%	2.7%	2.9%	2.3%	3.0%	2.9%	1.7%	2.3%	2.3%
N/A	2.5%	5.6%	4.5%	2.9%	3.7%	5.6%	1.7%	3.5%	3.0%

34% of Virtual Challenge Participants Were Over 50
while
24% of In-Person Participants Were Over 50

2022 Event Participation by Age



Takeaways

- Female participants make up the majority of race participants. Make sure you offer swag that is tailored to them and integrate female athletes into all your marketing images and messaging.
- Gen Z and younger Millennial participants are needed to sustain the current participation levels in the industry. Surveys indicate that both generations are socially aware and driven by social interactions – bring them back by beefing up your relationship with charity partners and incentivizing social teams for your event.
- Look for ways to build more welcoming events with inclusive gender options, virtual events for those who can't (or won't) attend in person, and distances that won't intimidate your beginners.

2.3

Event Size by Type

The key takeaway from this section is simple: while media attention and marketing efforts for race registration companies focus on the *largest* events, the vast majority of endurance events in the US are small, community affairs. Ninety-five percent of in-person events in 2022 had fewer

than 500 participants, with 72% registering under 100 participants. The pattern is similar, but even more pronounced for virtual events, with 98% of virtual events and 96% of virtual challenges drawing fewer than 500 participants.

In-Person Events by Size

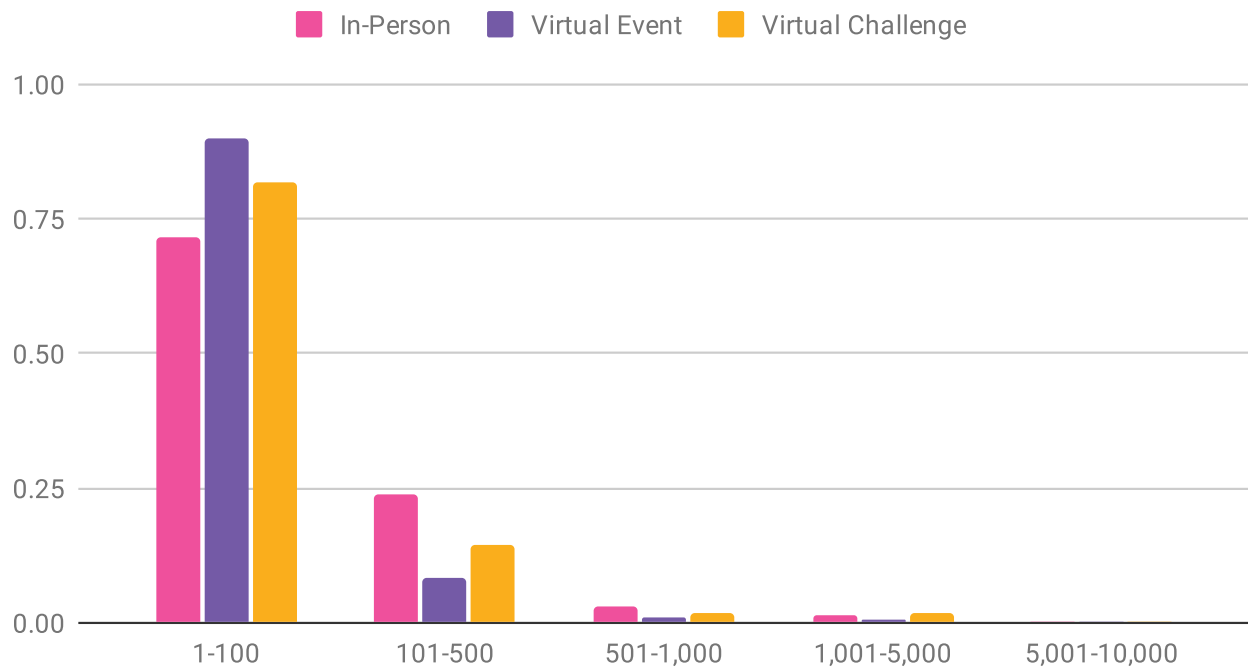
	2019 In-Person Events	2020 In-Person Events	2021 In-Person Events	2022 In-Person Events
1-100	68.9%	78.5%	74.0%	71.5%
101-500	25.4%	18.1%	22.1%	23.9%
501-1,000	3.4%	2.1%	2.3%	2.9%
1,001-5,000	2.1%	1.2%	1.5%	1.6%
5,001-10,000	0.1%	0.0%	0.0%	0.1%

Virtual Events by Size

	2019 Virtual Events	2020 Virtual Events	2021 Virtual Events	2022 Virtual Events	2020 Virtual Challenges	2021 Virtual Challenges	2022 Virtual Challenges
1-100	92.4%	78.3%	83.7%	89.8%	77.7%	78.9%	81.8%
101-500	6.5%	18.3%	13.8%	8.4%	17.9%	18.1%	14.4%
501-1,000	0.7%	2.2%	1.5%	1.0%	2.8%	1.7%	2.0%
1,001-5,000	0.4%	1.1%	1.0%	0.7%	1.4%	1.1%	1.8%
5,001-10,000	0.0%	0.1%	0.1%	0.1%	0.2%	0.1%	0.1%
10,000+	0.1%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%

95% of In-Person Events in 2022 Had Fewer than 500 Participants

2022 Size of Event by Type



Takeaways

- The endurance market is made up of much more than just large-scale races. When looking for growth opportunities, consider smaller community events that build the running community with less overhead.
- Look for resources and technology that are designed for your events, not ones geared towards major marathons. Local race directors, online forums, and sites like Race Director's Hub often provide more relevant guidance to small events.

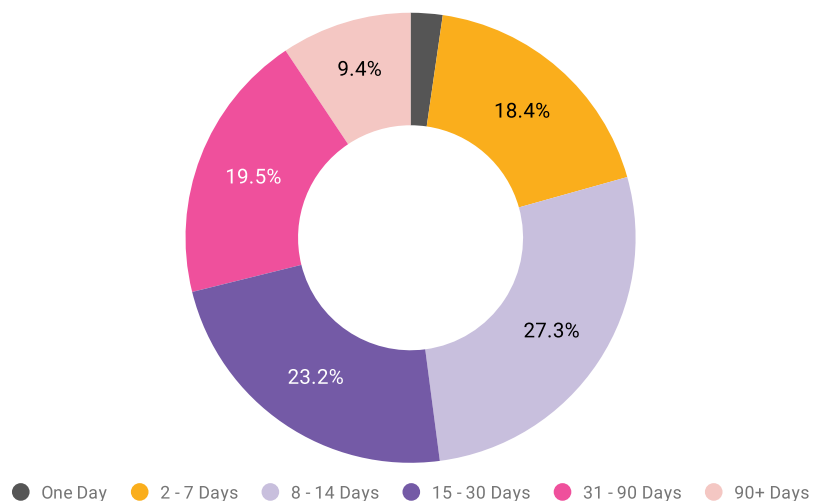
2.4

Length of Virtual Events

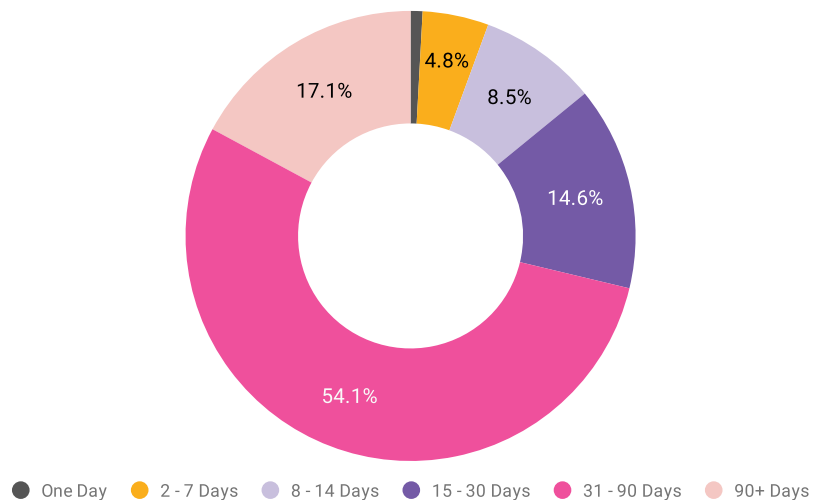
To succeed, virtual events and challenges are typically much longer than traditional events. Virtual races tend to exist around a tighter timeline, with 71% completing within a month, while virtual challenges are long-term commitments, with 71% running for at least a month.



Length of a Virtual Race



Length of a Virtual Challenge





Takeaways

- Flexible scheduling is the key selling point for virtual races and challenges. Even if you offer your virtual event alongside an in-person option, provide virtual participants at least one to two weeks to ensure they can fit it into their busy schedule.
- Virtual challenges require a commitment from both participants and race organizations, with successful challenges providing interaction and engagement for at least a month. Set up as many automated rewards as possible to limit headaches once the challenge is running.



My favorite feature is the reserved entry links and loyalty lists. They worked so well this year with all of our deferrals and trying to keep everybody in line. So having that reserved entry link for that specific group of people, and then syncing it up with that loyalty list so only those people can use that link, it worked out perfectly. We also use it with groups and teams with special pricing, and the functionality of that has helped us in more ways than we could imagine.”

- LYDIA THURSTON

OneAmerica 500 Festival Mini-Marathon



03

Registration Trends

Registration Trends

Key Findings and Trends

- Registration patterns in 2022 remained remarkably consistent, with **25.1% of registrations coming on race week and just 13.6% of registrations more than 3 months in advance**. Every race distance isn't the same, though – marathons saw just 7.1% of registrations on race week and 51.3% occurring more than 3 months prior to race day.
- There's no doubt about it: race prices have increased after the low overhead of virtual races caused a sharp price drop. In 2022, **10K prices were 11.8% higher than in 2021 and 5.9% higher than in 2019**.
- Merchandise provides a revenue boost for races, with **add-ons contributing an additional \$1,122.73 to events and store items adding \$1,748.50** to each event.
- More than $\frac{3}{4}$ of all race website views came from mobile devices, an increase since 2021. Perhaps even more important: transactions on mobile devices also rose, with **60% of transactions occurring on a mobile phone or tablet**.

Conclusions and Recommendations

- Prepare for registrations in the final months or weeks before your race, no matter how much you want to discourage procrastination. Enable inventory to manage your swag supplies and plan for easy on-site and online registration all the way up to the race start.
- Race budgets have been strained by the 2020 cancellations, increasing permitting and municipal fees, and inflation. Reassess your race budgets and event prices to ensure financial viability in 2023.
- Need to boost revenue? Easy add-ons (like upgraded t-shirts), on-site perks (like VIP parking), and premium swag items (like a branded race jacket) can help make up for lost revenue from decreased participation.
- Mobile isn't just important, it's the priority. If you aren't using a mobile-optimized RunSignup race website, make sure you test every step of your website and registration process on mobile – and limit extraneous questions to speed your registration pathway.

3.1

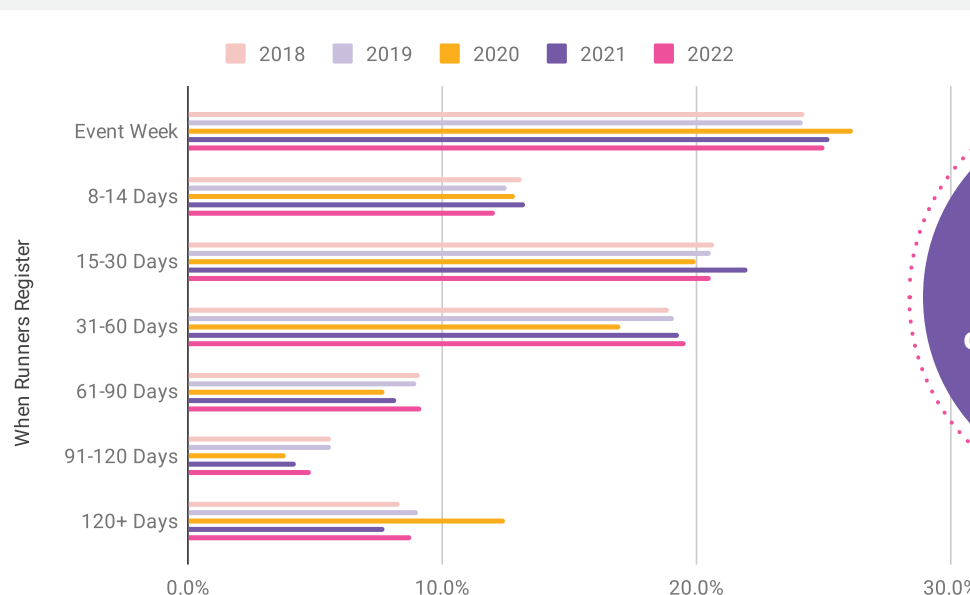
When Runners Register

Throughout all the chaos of the last few years, event registration patterns have remained remarkably consistent. As we've seen in previous years, procrastinators who wait until race week to register make up about a quarter of all participants. When we compare the patterns

to 2019, the biggest shift is a reduction in registrations more than 90 days out from race day – not surprising when you consider that recent limitations on long-term planning impacted both race's ability to open registration and runner's willingness to sign up.

When Runners Register

When Runners Register	2018	2019	2020	2021	2022	Change 2019-2022	Change 2021-2022
Event Week	24.3%	24.2%	26.1%	25.2%	25.1%	3.7%	-0.7%
8-14 Days	13.1%	12.5%	12.9%	13.3%	12.1%	-3.4%	-9.0%
15-30 Days	20.7%	20.6%	20.0%	22.0%	20.6%	0.1%	-6.6%
31-60 Days	18.9%	19.1%	17.0%	19.3%	19.5%	2.4%	1.2%
61-90 Days	9.1%	9.0%	7.7%	8.2%	9.2%	1.8%	11.9%
91-120 Days	5.6%	5.6%	3.9%	4.2%	4.8%	-14.8%	13.1%
120+ Days	8.3%	9.0%	12.4%	7.7%	8.8%	-3.1%	13.6%

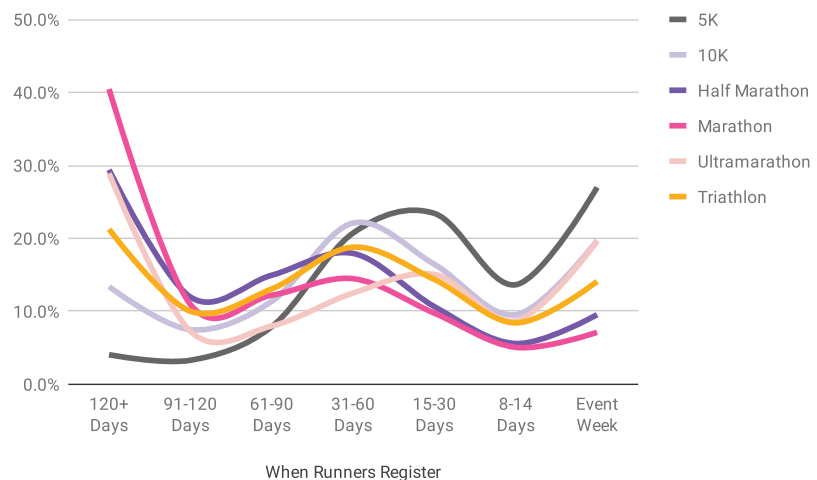


When Runners Register by Distance

When you break down the registrations by distance, the registration curve shows a little variation. Shorter events are much more likely to see race week registrations than events like marathons and triathlons, while those longer events have significantly more registrations more than 90 days

before race day. Longer training cycles and larger financial commitments most likely explain those differences. However, even with these variations, every event follows a similar pattern of early interest, a mid-cycle boost, and then a drop until the race week scramble to register.

When Runners Registered in 2022	5K	10K	Half Marathon	Marathon	Ultra-marathon	Triathlon
Event Week	27.0%	19.7%	9.5%	7.1%	19.6%	14.1%
8-14 Days	13.6%	9.5%	5.6%	5.1%	8.7%	8.4%
15-30 Days	23.4%	16.4%	10.6%	9.7%	15.1%	14.4%
31-60 Days	20.7%	22.1%	17.9%	14.5%	12.5%	18.8%
61-90 Days	7.9%	11.4%	14.9%	12.2%	8.0%	13.1%
91-120 Days	3.3%	7.5%	12.0%	10.9%	7.3%	10.0%
120+ Days	4.1%	13.4%	29.4%	40.4%	28.9%	21.3%



Takeaways

- Prepare for late registrations, especially for shorter distance races. Implement some cost-saving strategies to help manage the uncertainty, including dynamic bib assignment (no wasted chips!), inventory management (to prevent over-selling add-ons) and more generic giveaways that can be used across races if your ordering is inaccurate.
- Use pricing to encourage earlier registration, with price increases by date or registration numbers and time-limited coupons.
- Boost early registrations with flexible participant management options that allow participants the freedom to sign up now and decide later which distance they are capable of. Offering options to defer also ease the buying decision process and encourage early registrations.

3.2

Registration Times

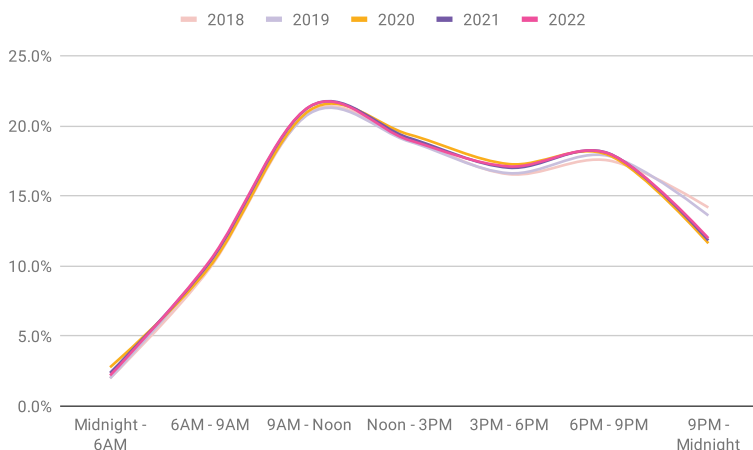
Online registration is always open. While traffic is light between midnight and 6:00am, participants are online and willing to sign up throughout the day and into the evening.



What Time do Participants Register?

Sign Up Hours	2018	2019	2020	2021	2022
Midnight - 6 AM	2.0%	2.0%	2.8%	2.4%	2.2%
6 AM - 9 AM	9.8%	10.2%	10.0%	10.3%	10.4%
9AM - Noon	20.9%	20.9%	21.1%	21.4%	21.4%
Noon - 3 PM	19.0%	18.9%	19.4%	19.1%	19.0%
3 PM - 6 PM	16.5%	16.6%	17.3%	17.0%	17.1%
6 PM - 9 PM	17.5%	17.9%	17.9%	18.0%	18.0%
9 PM - Midnight	14.2%	13.6%	11.6%	11.8%	12.0%

The only noticeable shift in the last 5 years is a reduction in the number of registrations occurring between 9pm and 12am, with a matching increase in registrations from 6pm to 9pm beginning in 2020.



Takeaway

- There's no "perfect" time for online event promotion. However, with 57.5% of participants registering between the working hours of 9am-6pm, it can be prudent to time your emails for those hours when you know they are more likely to be in front of a computer.

3.3

Pricing Trends

Average Price

Event prices have now risen beyond 2019 levels after the lower overhead of virtual races led to low prices in 2020 and 2021. Rising municipal

costs, inflation, lower participation numbers, and the debt accrued during the pandemic are likely all leading to the need to raise prices for events.

Price by Event Distance

Event Distance	2018 Average Price	2019 Average Price	2020 Average Price	2021 Average Price	2022 Average Price	Change 2021-2022	Change 2019-2022
1 mile	\$17.48	\$17.99	\$17.73	\$19.60	\$20.05	2.3%	11.5%
5K	\$26.40	\$28.05	\$26.39	\$27.40	\$28.94	5.6%	3.2%
10K	\$34.63	\$35.97	\$31.27	\$34.55	\$38.09	10.2%	5.9%
Half Marathon	\$66.33	\$63.09	\$53.13	\$58.38	\$65.29	11.8%	3.5%
Marathon	\$90.75	\$89.53	\$72.25	\$74.47	\$86.62	16.3%	-3.3%
Ultra	\$108.38	\$110.99	\$72.64	\$70.98	\$95.73	34.9%	-13.7%
Triathlon	\$91.26	\$90.50	\$88.41	\$97.15	\$99.64	2.6%	10.1%

Note: while the longest distances (marathons and ultramarathons) are still lagging 2019 prices, they are also the events that are still the most likely to be impacted by virtual events since many virtual challenges are recognized as races of more than 26 miles.

10K Prices were 6% Higher in 2022 Than in 2019

Number of Price Increases

Perhaps more surprising than increasing prices is that races are still implementing fewer price increases than they did in 2019. While some of this may be the result of later registration

openings due to continued uncertainty early in the year, it's clear that races still haven't fully resumed their pre-pandemic pricing patterns.

Event Distance	2018 # of Price Increases	2019 # of Price Increases	2020# of Price Increases	2021 # of Price Increases	2022 # of Price Increases	Change 2021-2022	Change 2019-2022
1 mile	0.5	0.6	0.4	0.5	0.6	20.0%	0.0%
5K	0.8	1	0.7	0.7	0.9	28.6%	-10.0%
10K	1.3	1.4	0.9	1.0	1.3	30.0%	-7.1%
Half Marathon	2	2.1	1.2	1.4	1.7	21.4%	-19.0%
Marathon	2.2	2.2	1.2	1.3	1.8	38.5%	-18.2%
Ultra	1.6	1.5	0.7	0.8	1.1	37.5%	-26.7%
Triathlon	2	2.2	1.5	2.0	2.4	20.0%	9.1%

Difference Between Minimum and Maximum Prices

In addition to fewer price increases, the difference between the lowest and highest prices for each distance continues to be less than it was in 2019 for most distances. This is

particularly true for longer events like marathons and ultramarathons, where virtual events and shortened registration periods have had the largest impact.

Event Distance	2018 Difference	2019 Difference	2020 Difference	2021 Difference	2022 Difference	Change 2021-2022	Change 2019-2022
1 mile	\$6.44	\$6.65	\$7.17	\$7.27	\$7.60	4.54%	14.3%
5K	\$8.36	\$10.38	\$10.85	\$8.94	\$9.61	7.49%	-7.4%
10K	\$10.39	\$11.53	\$10.90	\$10.73	\$12.33	14.91%	6.9%
Half Marathon	\$23.79	\$24.25	\$20.90	\$20.29	\$23.07	13.70%	-4.9%
Marathon	\$36.00	\$36.49	\$28.30	\$28.77	\$32.68	13.59%	-10.4%
Ultra	\$39.94	\$39.33	\$27.48	\$28.63	\$33.79	18.02%	-14.1%
Triathlon	\$29.83	\$28.35	\$27.90	\$29.90	\$32.23	7.79%	13.7%

\$12.33 separated the low and high price for a 10K in 2022



Takeaways

- Prices are increasing for products and events across the country. Stay focused on what the cost of your event needs to be to cover your expenses (including required profit) rather than trying to match 2019 prices that don't reflect the current climate in the industry.
- Pricing is a powerful tool to prompt action. Sketch out a plan for price increases for your event and use those increases to justify email marketing campaigns, social media posts, and advertising.
- Give your pricing a punch with creative displays that call out discounts (like for age) and include strike-through prices that show how much participants save when they register early. Pricing is only a motivator when you make it obvious!

3.4

Pricing Strategies

Time-sensitive calls to action are one of the most reliable methods for prompting non-committal registrants to pull the trigger. While fewer price increases in 2020 and 2021 meant fewer opportunities for time-sensitive calls to action, in 2022 we saw nearly a quarter of all registrations coming within three days of a price increase or registration close. As price increases continue to approach previous frequencies, expect to see this number rise to (or beyond) 2019 levels.

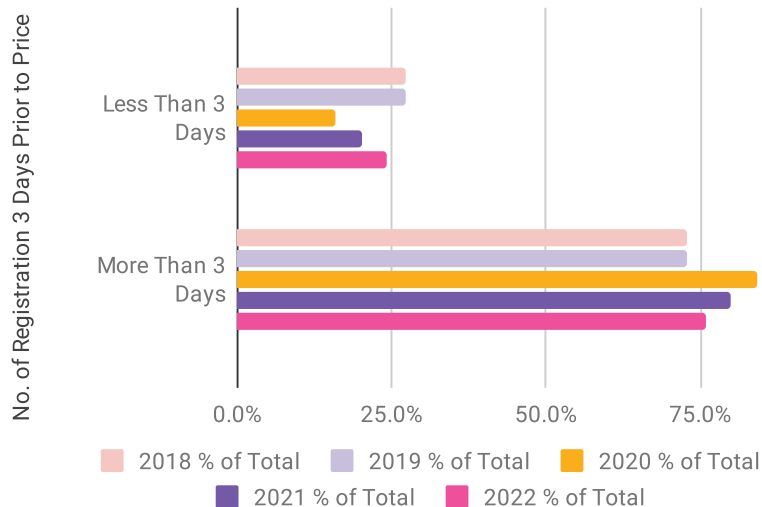


Percent of Signups Within 3 Days Prior to a Price Increase or Registration Close

Registration 3 Days Prior to Price Increase or Registration Close	2018 % of Total	2019 % of Total	2020 % of Total	2021 % of Total	2022 % of Total
Less Than 3 Days	27.3%	27.2%	15.8%	20.2%	24.1%
More Than 3 Days	72.7%	72.8%	84.2%	79.8%	75.9%

Takeaways

- We know that pricing strategies drive registrations, but that doesn't mean your only option is to add dozens of price increases. Consider other price-driven strategies like age-based pricing, discounts for group size, membership discounts, and loyalty programs to capitalize on the motivating power of price.
- For effective pricing, pick a strategy and stick to it. Offering too many discounts makes your pricing challenging to understand and dilutes the power of every discount and the value of your race.



3.5

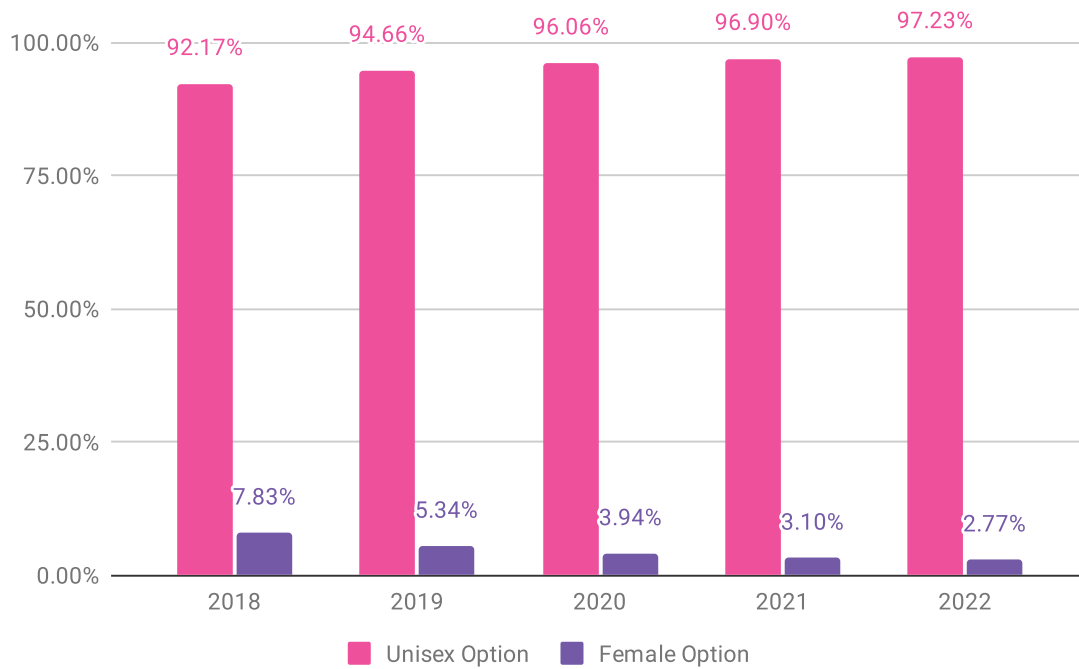
Giveaways

While female athletes continue to out-pace male athletes in registrations, shirts are increasingly offered only in unisex sizing. In 2022, only 3.1% of races offered a female-specific shirt size. Supply chain issues and event uncertainty may be contributing to the focus on providing just one simple option for giveaways.

Another trend that could be impacting the low number of female giveaway options within the system could be races are moving away from gendered language around shirts. Instead, some races are opting for more neutral choices like "Relaxed Fit" and "Fitted Cut".

3%
of Events
Offered a Female
Giveaway Size

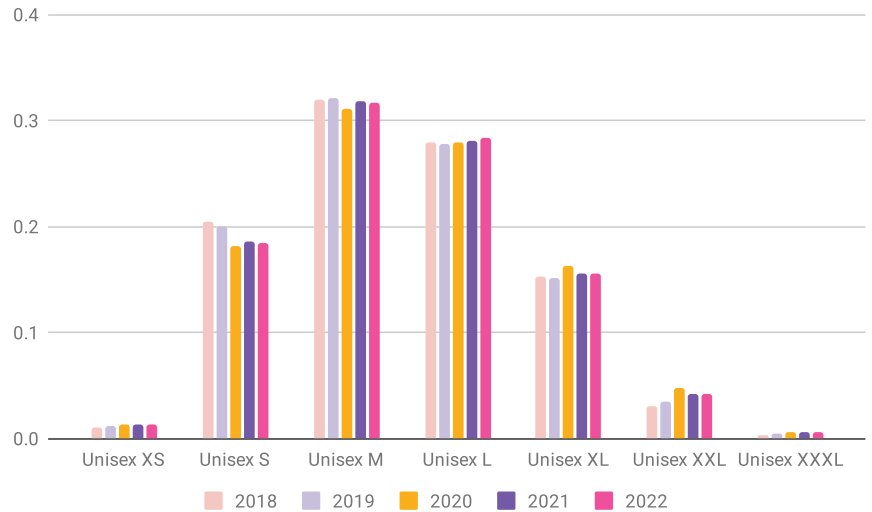
Giveaways Offered



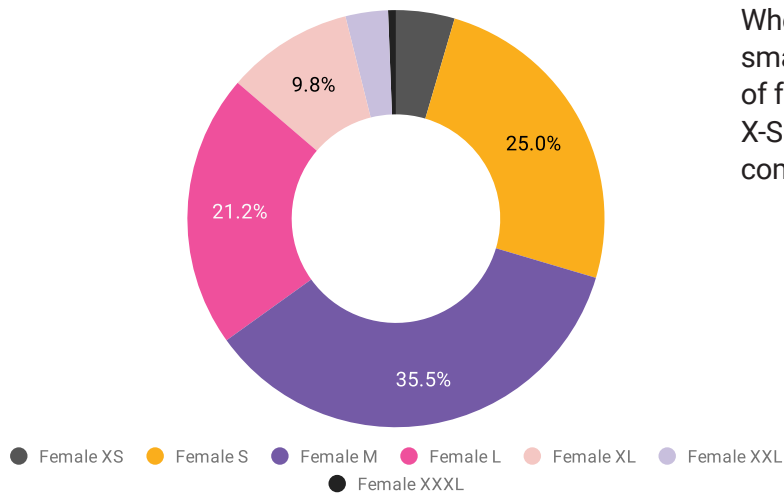
Unisex Size Breakdown

Average unisex shirt sizes increased during the virtual peak of 2020 and have largely returned to a distribution similar to 2019. However, unisex smalls continue to be less commonly requested, with small increases in mediums, larges, and x-larges making up the difference.

32% of Unisex Shirts Were Mediums



Female Shirt Breakdown 2021



When female shirt sizes are offered, smaller options are popular. 30% of female shirts were Small or X-Small, sizes that often do not have comparable options in unisex sizes.

Takeaways

- Women make up the majority of race participants. Whatever you call your shirt options, make sure you offer smaller, more fitted sizing options to cover the 30% of women who would order a size below unisex small.
- Supply chains remain inconsistent, and prices for t-shirts have increased over the last few years. Consider a creative giveaway like hats or gloves – or a no-frills event – to reduce the hassle of t-shirt supplies and make your race stand out.

3.6

Merchandise

Swag can be an alternative revenue stream for savvy events who offer merchandise through add-on or store items. The average price of both

add-ons and store items has increased steadily since 2018, indicating that people are willing to spend a little more for more premium items.

Purchases with Add-Ons

Purchases with Add-Ons	2018	2019	2020	2021	2022
Percent of Registrations with Add-Ons	17.9%	15.8%	22.3%	16.8%	15.3%
Percent of Revenue with Add-Ons	2.8%	3.2%	5.0%	4.0%	4.0%
Average Amount Paid for Add-Ons	\$6.48	\$8.21	\$7.91	\$10.31	\$12.40
Average Event Revenue from Add-Ons	\$1,066.43	\$1,236.81	\$837.38	\$936.99	\$1,122.73

Store items, in particular, often have a higher price point. This is because add-ons are often (but not always) used for slight upgrades that only interest participants (such as \$5 for a tech shirt instead of cotton), whereas store items tend to be more premium items that may appeal to participants and spectators alike (like a jacket or light-up hat).

\$1,123 Average Event Revenue from Add-Ons

\$1,749 Average Event Revenue from Store Items

Purchases with Store Items:

Purchases with Store Items	2018	2019	2020	2021	2022
Percent of Registrations with Store Items	1.4%	1.2%	2.2%	2.0%	1.4%
Percent of Revenue with Store Items	1.0%	0.9%	1.8%	1.5%	1.0%
Average Amount Paid for Store Items	\$30.73	\$29.48	\$27.72	\$32.76	\$36.24
Average Event Revenue from Store Items	\$1,140.49	\$1,152.14	\$1,222.28	\$2,098.37	\$1,748.50

Takeaways

- High quality merch can be a great way to boost revenue with little additional overhead. If you're investing in swag as a driver of revenue, make sure you're also investing the time to promote the items on your website and in your email and social media campaigns.
- While additional revenue is an obvious perk, merch can also help you build your brand. When you offer premium items that people really want to wear (or use), those items become walking billboards for your event(s)!

3.7

Mobile Adoption

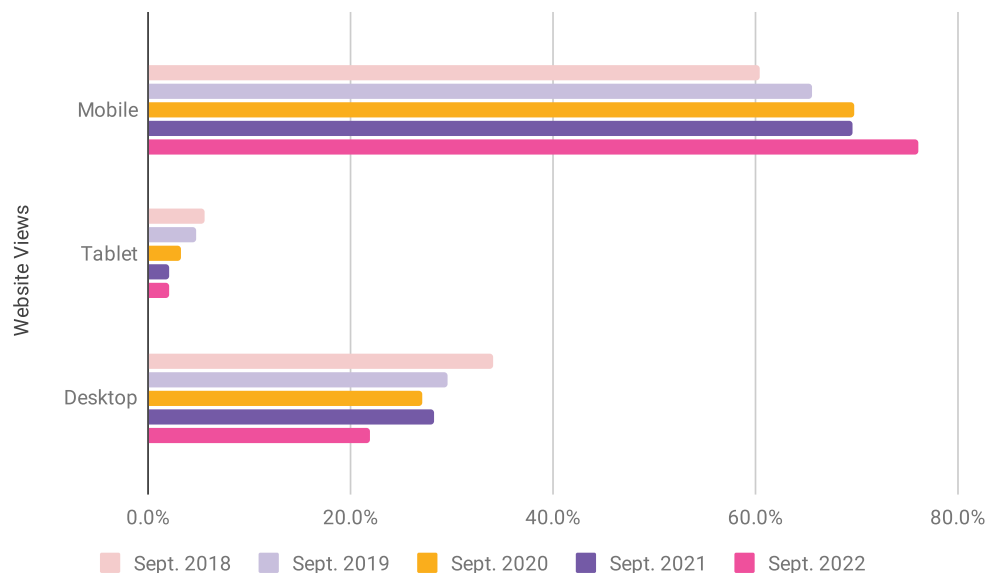
Mobile continues to cement itself as the device of choice for viewing race websites. After stalling at 70% in 2021, mobile took another leap in 2022 with more than 76% of all 2022 website views

coming from mobile devices. Meanwhile, the frequency of tablet usage has dropped from 6% in 2018 to just 2% in 2022.



Website Views by Device Type

Website Views	Sept. 2018	Sept. 2019	Sept. 2020	Sept. 2021	Sept. 2022
Mobile	60.5%	65.6%	69.7%	69.7%	76.0%
Tablet	5.5%	4.7%	3.2%	2.1%	2.0%
Desktop	34%	29.6%	27.1%	28.3%	21.9%



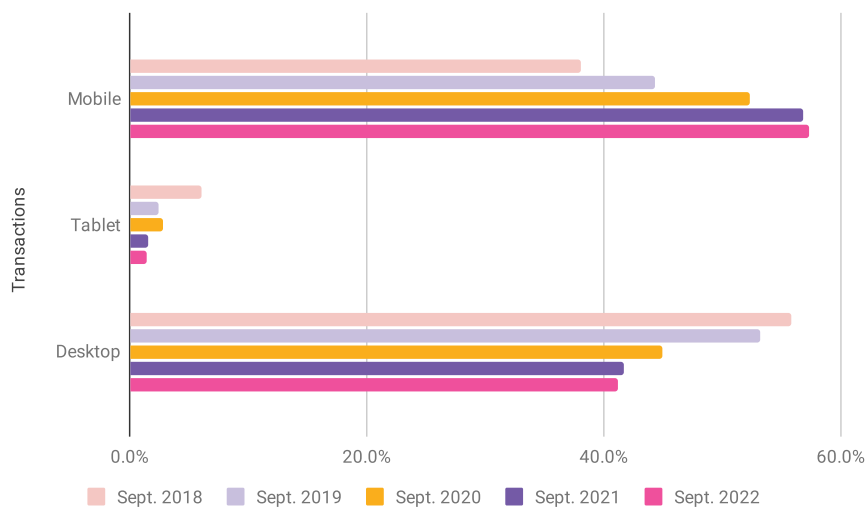
Transactions by Device Type

Like website views, transactions on mobile devices continued to increase in 2022 with 57.4% of all transactions taking place on mobile. Mobile-first user designs and the increasing regularity

of making purchases by phone have significantly reduced the inclination to switch to a desktop before registering.

Transactions	Sept. 2018	Sept. 2019	Sept. 2020	Sept. 2021	Sept. 2022
Mobile	38.1%	44.4%	52.3%	56.8%	57.4%
Tablet	6.1%	2.4%	2.8%	1.5%	1.5%
Desktop	55.8%	53.2%	45.0%	41.7%	41.2%

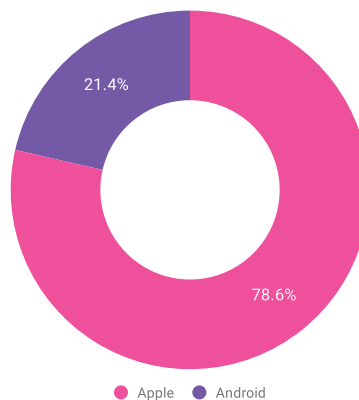
60% of Transactions Take Place on a Mobile Device or Tablet



Device Type

Device Type	Sept. 2018	Sept. 2019	Sept. 2020	Sept. 2021	Sept. 2022
Apple	74.0%	76.4%	76.3%	75.3%	78.6%
Android	26.0%	23.1%	23.4%	24.7%	21.4%

Apple continues to lead the mobile market, with their share of devices used to view race websites increasing slightly to 78.6%.





Takeaways

- Mobile is first. RunSignup websites, email, and registration pathways are designed for mobile, but no matter what technology you use, it's key that you always test your communications and registrations on a mobile device.
- As transactions on mobile devices increase, focus on creating registration pathways that are mobile-friendly with limited open-ended questions, no extraneous data collection, and platforms that (securely) save credit card data and key participant information.
- Remember the mobile option when making decisions about race day registration options. As people become comfortable registering on their phones, it's increasingly easy to use a QR code to direct race day registrants to sign up on their phones instead of setting up physical kiosks or dealing with paper registrations.



If we're running a special promotion we will go through and specifically target on the email list, excluding current participants and only pull in past participants. Then we can send a special promotion just to the people who haven't signed up yet. We also use email for follow-up emails. As soon as our race photos are uploaded from our race on Sunday, we will send a wrap up, using those replacement tags to make it easy to download your finisher certificate and find your results, etc."

- JASON CHANCE

TCR Event Management



04

Promotion Trends

Promotion Trends

Key Findings and Trends

- Referral rewards continue to be a cost-effective way to expand your funnel and increase your registrations. **In 2022, referral refunds had a cost per acquisition of just \$0.98.**
- Across the last five years, approximately 30% of participants have joined teams when they are available, with **30.4% of participants opting to join a team in 2022.**
- RunSignup's free email marketing continues to increase in adoption, with **421 million emails sent in 2022.** The result of those emails? RaceInsights estimates that **12.9% of registrations came from the integrated email marketing system.**
- More race website views come from organic search than from paid Google ads, with **22% of 2022 race website views initiating from organic search.**

Conclusions and Recommendations

- Boost your referral rewards programs by stacking financial and swag rewards – and to get the most out of your referral program, make sure you promote the rewards on your website and social media sites, and via registration follow-up emails.
- Offering teams can boost your registrations, but they also make your event more *fun*. Consider t-shirt contests, photo competitions, and team spirit awards to keep energy high throughout your event.
- Email marketing is a key component of any race marketing campaign, but costs can add up quickly as your contact lists grow. Cut your costs with a free email marketing platform, and save time with set it and forget it automated emails.
- Your website is the public messenger for your race. Make sure yours is SEO-optimized so potential participants can find it, and include dynamic components that automatically update key details like current price, upcoming price increases, and fundraising leaders.

4.1

Coupons

While coupon usage appears to be on the rise, the 6.1% of 2022 registrations attributed to coupons is down from 8% in 2019. However, the ROI on coupons has actually improved since 2019, with an ROI of 367% in 2022. Notably, the average discount from coupons has hovered between \$10-13 since 2018, indicating that large discounts aren't necessary to encourage registrations.

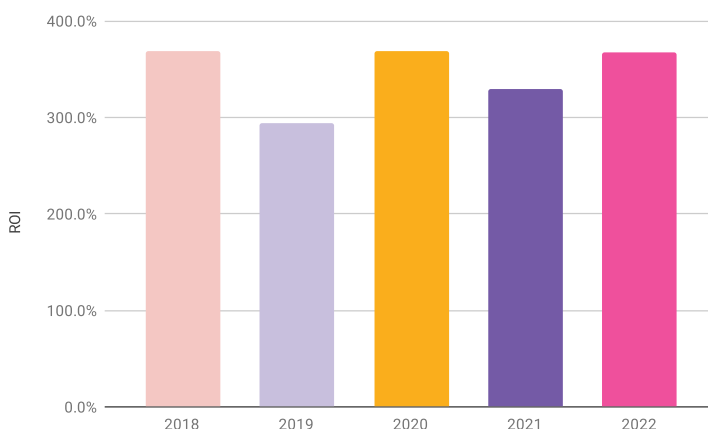
Coupon Usage and ROI

Coupons	% of Registrations Using Coupons	ROI	Average Discount	Total Discounts	Net Revenue From Coupons
2018	7.5%	369.0%	\$10.92	\$3,559,383	\$13,132,704
2019	8.0%	294.0%	\$13.88	\$5,696,303	\$16,748,501
2020	5.5%	368.3%	\$10.71	\$2,117,844	\$7,800,917
2021	5.8%	328.7%	\$12.75	\$3,156,602	\$10,376,051
2022	6.1%	367.3%	\$12.14	\$4,126,419	\$15,156,513

\$12.14 Average Discount for a Coupon

Takeaways

Coupon ROI



- Small, but meaningful discounts can motivate action – in many cases, \$10-15 is enough to prompt sign-ups. There's no need to undervalue your event with excessively large coupons.
- Like with all pricing strategies, your plan for coupons needs to be made with intention. Choose a few key promotions or partnerships to discount via coupons, make every coupon time-limited, and stick to your plan.

4.2

Referral Rewards

The pandemic and subsequent growth of online activity and virtual events were ideal conditions for referral rewards, with a whopping 17% of 2020 transaction dollars attributed to referrals (when enabled). As regular racing has returned, so have regular rates of success with referral rewards programs, with 6% of transactions from referrals in 2022.

Despite the return to earth, referrals remain one of the most effective ways to recruit participants and engage them as ambassadors. In fact, the ROI of referrals actually improved compared to 2019 while the CPA decreased to just under \$1 per successful referral.

Percent of Registrations and Transactions from Referral Rewards

	2018	2019	2020	2021	2022
# Total Registrations	6%	6%	13%	7%	5%
# Total Transactions	6%	7%	17%	8%	6%

**6% of Transactions
are from Referrals
(When Enabled)**

Across most metrics (including the number of completed registrations, the amount of registration dollars, and the ROI of referrals) referral programs in 2022 were similar to or slightly better than we saw in 2019.

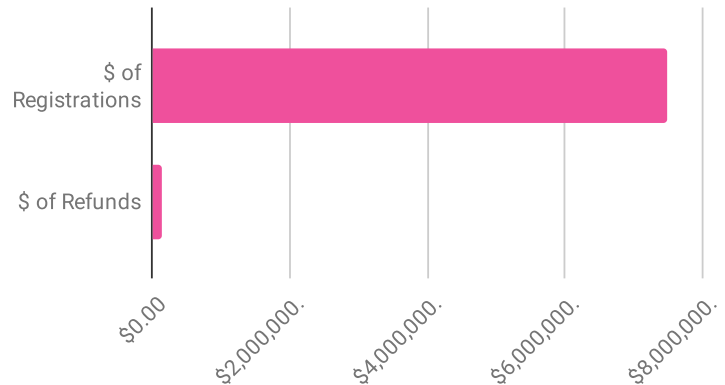
\$0.98 Cost Per Acquisition for Each New Registration via Referral Reward Refunds

Referral Rewards Results

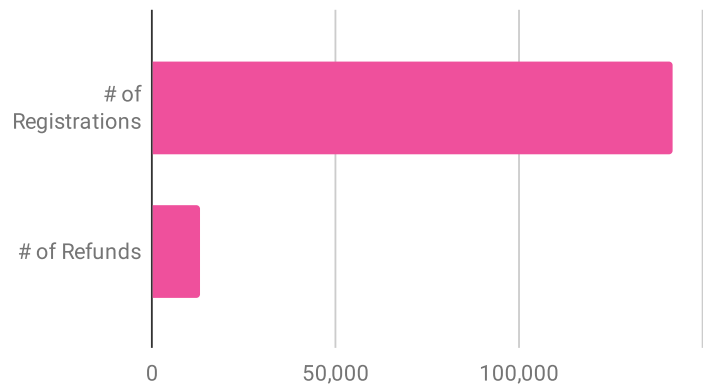
	2019	2020	2021	2022	Change 2019-2022	Change 2021-2022
No. Referral Codes	304,559	436,761	482,857	314,446	3.2%	-34.9%
No. Event Page Views	2,074,611	12,853,014	6,283,731	1,979,469	-4.6%	-68.5%
No. Sign Up Page Views	274,629	646,415	335,613	240,335	-12.5%	-28.4%
No. Completed Registration Transactions	104,639	232,034	141,411	115,943	10.8%	-18.0%
No. Completed Registrations	129,485	269,548	165,991	141,830	9.5%	-14.6%
Completed Registration Amounts	\$6,314,452.28	\$12,123,526.60	\$8,322,654.42	\$7,481,605.57	18.5%	-10.1%
No. Referral Refunds	10,131	21,937	20,601	13,210	30.4%	-35.9%
Estimated Referral Refund Amounts	\$132,523.64	\$233,854.27	\$231,603.46	\$139,539.18	5.3%	-39.8%
Estimated ROI	4665%	5084%	3493%	5262%	12.8%	50.6%
Estimated CPA	\$1.02	\$0.87	\$1.40	\$0.98	-3.9%	-30.0%

Why are referrals so cost-effective? When you set your thresholds high (but attainable), many participants will refer a friend or two, while falling short of the number required to receive a refund.

Value of Registrations vs. Cost of Refund Rewards



of Registrations vs. # of Refunds



Takeaways

- Referrals work because people trust recommendations from family and friends more than they trust traditional advertising. However, referral programs do require work to motivate sharing. Highlight your referral program on your race website and set up registration follow-up emails to remind participants of the rewards offered for referring to your event.
- Cultivate super-supporters with stacked rewards programs. For example, offer a \$15 refund for 5 referrals, a high quality coffee cup for 10 referrals, and a premium jacket for 15 referrals. Most participants won't achieve 15 referrals (or even 5), but a few motivated people will - and rewarding them well will ensure they continue to be ambassadors for your event for years to come.

4.3

Groups/Teams

Group/team participation has remained steady over the last 5 years, with 30.4% of participants opting to join a group this year (when offered). Among the data points in this report, teams may be the most unflappable one, maintaining a steady rate of success across virtual, hybrid, and in-person events.

30% of Participants Joined a Team When They Were Offered.

Group Participation and Size

Year	% Participants in Groups	Average Group Size
2017	30.6%	6.0
2018	28.9%	6.4
2019	29.4%	6.4
2020	31.4%	6.6
2021	29.8%	6.8
2022	30.4%	6.8

The average size of each team has crept up slightly, with 6.8 participants per team in both 2021 and 2022. Some events encourage team members to invite more participants by providing incentives based on the size of the team. Incentives can be financial, in the form of automated refunds, or they can be premium swag or on-site perks like a team tent.

Takeaways

- The best promotion for your event is a participant who loves the event and brings others along for the fun. Inspire participants to recruit their friends and family by offering and highlighting your team options.
- Larger teams engender a more social and interactive race day, and ensure a positive experience for your participants. Provide incentives for teams that reach certain size thresholds to reward their efforts and motivate them to continue to recruit.
- For teams that aren't scored competitively, always allow participants of different events/distances (including virtual and in-person options) to join the same team. An inclusive team option drives multi-generational participation and inspires participation by beginners.

4.4

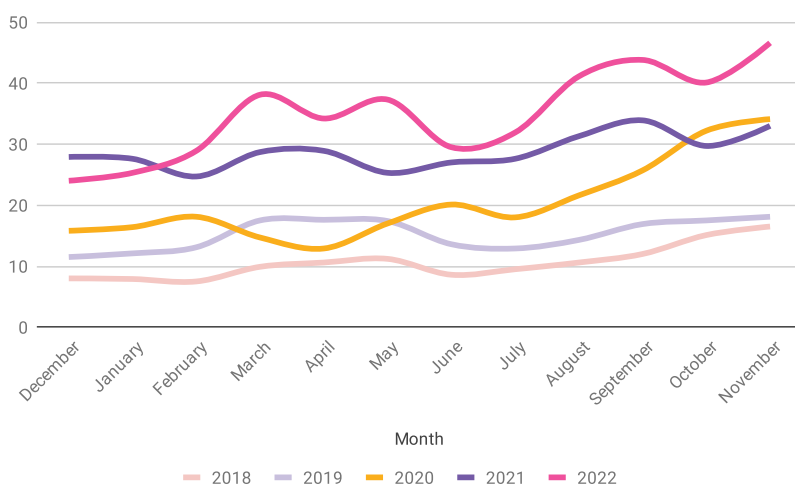
Email Marketing

RunSignup's integrated email marketing platform gives race directors a free and easy way to reach current and former participants, volunteers, fundraisers, donors, and custom lists of contacts. Over the last five years, usage of the email marketing platform has grown consistently, with an additional boost following the release of Email V2 and Email for Organizations in 2022.

While some of this growth is tied to an increasing number of events on the RunSignup platform, it also represents a number of events looking to save money on email costs and keep their communications within their event registration platform. As Email V2 expands its automation features, we expect to see more events opting to move away from paid email.

421 Million Free Emails Were Sent by Race Directors in 2022

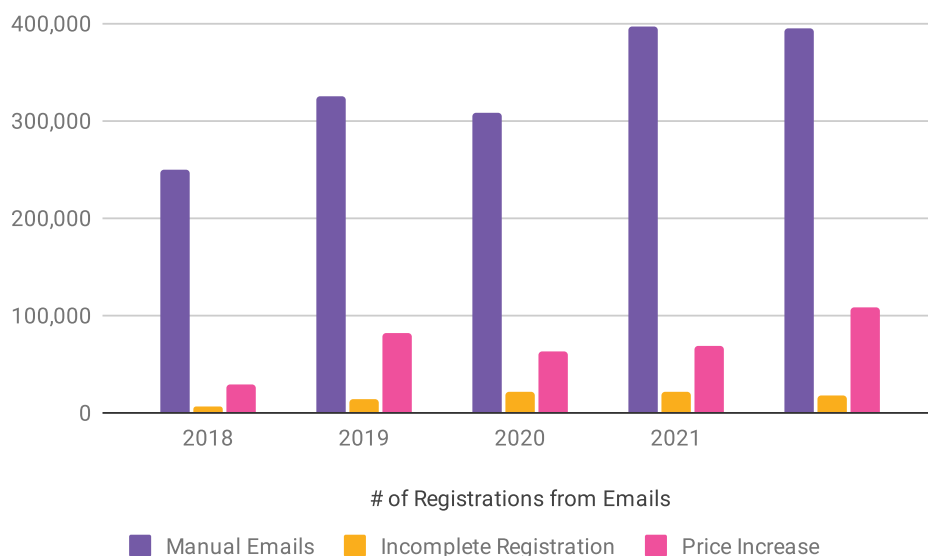
Total Emails Sent via Email Marketing (in Millions)



While race directors can prepare and send emails at any time, automated emails that are built into the platform simplify the process of sending some standard types of emails by allowing modifications to pre-defined emails.

Automated emails include:

- **Incomplete Registration emails** to prompt a supporter who begins, but does not complete, the registration process
- **Price Increase emails** to send reminders about upcoming price increases to current and previous participants
- **RaceJoy emails** to educate participants on best practices for using the runner tracking app
- **Registration follow-up emails** to provide key updates to participants after they register, such as sending reminders to refer the event to friends and family or recruit team members



8.5% of 2022 Paid Registrations Resulted from Free RunSignup Emails

Registrations from Emails

Email demonstrates a great power to actually prompt registrations, with 8.5% of all paid registrations in 2022 resulting from emails sent from the RunSignup system.

Of those, manual emails (ones drafted and scheduled by race directors) are still the

most effective, but automated price increase emails and incomplete registration emails also contributed a significant number of registrations. In 2022, automated price increase emails accounted for 1.9% of registrations. As Email V2 incorporates more automated emails, look for this percentage to increase.

Takeaways

- Email marketing is one of the cornerstones of race marketing in 2022. Opt for free email tools that give you the flexibility to decide who and how often to email without juggling the financial implications.
- Enable automated emails and never leave money on the table. Automating your emails will reduce stress and overhead while ensuring you capture every registration and build up your participation on the margins.
- Registrations from registration follow-up emails can't be quantified here, but they are crucial to support your other marketing efforts. Use your registration follow-up emails to encourage participants to refer their friends, remind supporters of fundraising incentives, and drive participants to recruit people to join their team.

4.5

Google Analytics

The data in this section is from our Google Analytics data for September of each year, providing an overview of how participants find and interact with event websites. This is the

same data used to evaluate mobile adoption in Section 3.7. Google data does not capture every session or visit; rather, the reports are based on the volume in the first chart below.

Traffic Volume Represented

	Sept 2018	Sept 2019	Sept 2020	Sept 2021	Sept 2022
Sessions	4,636,812	6,238,604	7,168,916	8,689,521	9,686,580
Transactions	\$17,848,933	\$23,070,205.85	\$19,119,072	\$31,723,172	\$38,113,609

Referral Sources for events are usually race calendars like RunningintheUSA.com, websites for timers or race series', or non RunSignup race websites (like scottcoffeerun.com). Referrals saw a slight upswing in 2021, although the percentage remained below that of 2019.

Organic Search is a link from Google that is not a paid ad. The high ranking of RunSignup event websites, and the increasing number of events using those websites as their main website, means organic search is key to driving traffic to event websites.

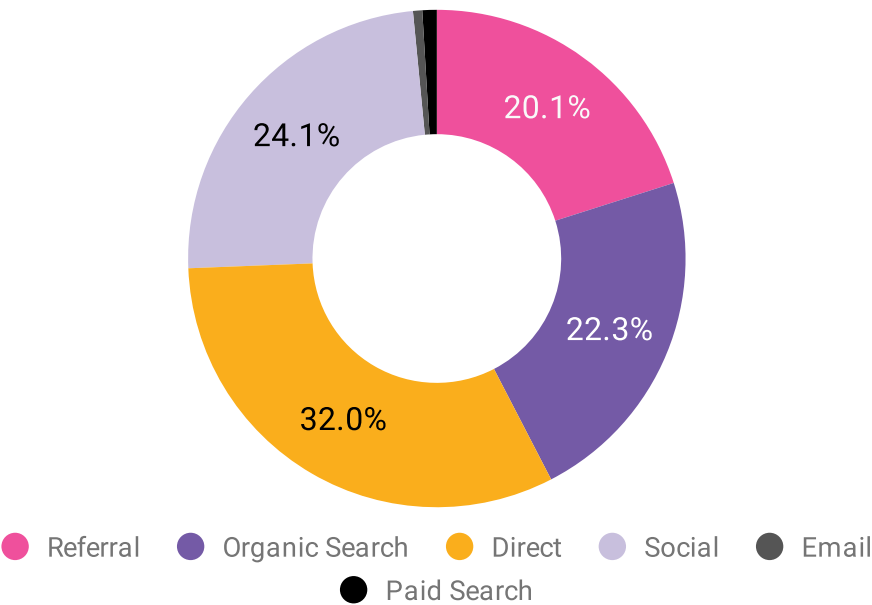
Paid Search, on the other hand, is a minor-driver of website traffic and usually utilized only by larger, high-budget events.

Direct Traffic, or typing the exact URL, has been the largest driver of traffic over the last two years. Some of this is likely incorrect attribution of traffic driven by emails.

Social Sources are covered in detail later in this section.

In 2022, Social, Referral, and Organic Search each made up 20-24% of the total traffic sources.

Sources of Website Views



20% Website Traffic from Referral Sources

22% Website Traffic from Organic Search

24% Website Traffic from Social Sources

Note: the low attribution to email as a source of traffic is likely due to incorrect source tracking between Google Analytics and different email clients. For example, a link in an email on a mobile phone opens the browser with a direct link and is counted as such. The 12.9% of transactions from email reported by RaceInsights (Section 4.6) is likely more accurate, but even with RaceInsights there are a number of links from an email to an event’s private domain that we cannot track.

Traffic Sources

Source	Sept 2018	Sept 2019	Sept 2020	Sept 2021	Sept 2022
Referral	35.8%	26.9%	19.4%	21.0%	19.8%
Organic Search	28.3%	29.8%	17.1%	29.6%	22.0%
Direct	20.0%	24.6%	35.5%	31.0%	31.5%
Social	13.8%	16.6%	24.9%	16.1%	23.7%
Email	0.6%	0.7%	1.0%	0.4%	0.6%
Paid Search	0.4%	0.3%	0.5%	0.7%	0.9%

Google summarizes all social sources into a single source type, but for events, Facebook made up 96% of the traffic driven by social media. Instagram has gained some prominence in the last few years, but continues to languish between 2-4% of all social traffic.

Social Sources

Source	Sept 2018	Sept 2019	Sept 2020	Sept 2021	Sept 2022
Facebook	93.7%	95.3%	96.5%	95.5%	95.7%
Instagram	1.8%	2.5%	1.5%	1.7%	2.1%
Instagram Stories	2.0%	0.9%	0.5%	1.0%	0.5%
Twitter	1.5%	0.7%	0.8%	0.7%	0.5%
Other	1.0%	0.6%	74.0%	1.1%	1.1%

Social Interactions are how Google Analytics defines the connection between social media and conversions. Contributed social conversions are interactions that were followed by a conversion, but not immediately, whereas a last interaction social conversion led directly to the conversion.

Social Value

Social Value	Sept 2018	Sept 2019	Sept 2020	Sept 2021	Sept 2022
Contributed Social Conversions	8.9%	8.6%	17.7%	10.0%	9.7%
Last Interaction Social Conversions	4.6%	4.4%	9.6%	6.0%	5.7%

While social media drove more conversions in 2022 than 2019, it was not as effective as it had been in 2020, and lagged slightly behind the number of conversions in 2021.

Takeaways

- Referral sources are a great (often free) way to expand your reach, contributing 20% of all website views. While many large race calendars automatically add RunSignup events, expand your reach by making sure you seek out local calendars via running clubs, running stores, timers, and local media.
- Social media continues to drive large amounts of traffic – almost exclusively through Facebook. If you are going to invest money in just one form of digital advertising, Facebook still has the highest potential reach.
- Far more participants find races via organic search than from Google Ads. If you aren't using an SEO-optimized RunSignup race website, take the time to review your SEO and make sure you're showing up in local searches.

4.6

RaceInsights

RaceInsights, RunSignup's integrated analytics engine, tracks every click, registration, and transaction on each race's website and analyzes the sources to show race directors the true impact of their marketing efforts. Our aggregate data shows that the largest source of transaction dollars is people going directly to a race's website, whether that is ScottCoffeeRun.com or RunSignup.com/ScottCoffeeRun. Additional sources of registration are shown below.

20% of Transaction \$ Came from Google. 13% of Transaction \$ Came from Email.

This data likely under-reports Google and Facebook as web referral sources since many events use these sources to drive traffic to their independent event websites before sending registrants to RunSignup. However, events that use RunSignup's free race website as their primary or only website would have accurate search engine attribution.

While Google and RunSignup Affiliates (such as RunningInTheUSA.com or HalfMarathons.net) are the most significant direct drivers of transactions, the biggest shift in this data is the increase in transactions driven by email. While some of that boost may be attributed to an increase in the percentage of races using RunSignup's free email marketing*, it's clear that a strong email strategy is a key driver of action.

**RaceInsights only reports emails sent from the RunSignup platform (with other emails recorded as direct traffic), so the true number of registrations from emails likely far exceeds the 13% reported.*

Source of Transactions

Source	2018	2019	2020	2021	2022
Google	16.8%	18.4%	14.0%	17.1%	19.5%
Email	6.1%	7.2%	5.3%	7.7%	12.9%
Facebook	4.8%	4.6%	12.2%	6.1%	6.9%
RunSignup Affiliates	12.1%	9.7%	7.1%	10.2%	17.2%
Bing	0.2%	0.2%	0.6%	0.9%	1.2%
Yahoo	0.2%	0.3%	0.3%	0.4%	0.5%

Takeaways

- Email is highly effective. If you're promoting your event on a tight marketing budget, free emails can go a long way towards spreading the word and prompting sign ups.
- RunSignup affiliates like race calendar websites are also an increasing driver of registrations. While many known race calendars

automatically add events from RunSignup, don't neglect smaller referral sources. Seek out local calendars with running clubs, running stores, and timers and make sure your event is included anywhere runners are looking for their next event.



We are just 1 week into our 8-week long Virtual Superhero Challenge & 5k and we have already exceeded our goals! Thanks to RunSignup we were able to create a seamless registration experience for our participants. Beyond registration, the software also allowed us to automatically create fundraising pages for every participant with no effort on their part. This has proven to be a powerful motivator. Our hope was that 400 people would participate and raise \$25,000 for our mission. With 7 weeks to go, we have 770 participants who have already raised more than \$55,000!"

- Sparrow's Nest of Hudson Valley



05

Give Trends

Give Trends

Key Findings and Trends

- High dollar donations can bring in real money for your cause, with 14.7% of donation dollars coming from donations of more than \$500 – despite making up just 0.4% of the total donations made. On the flip side, people are most likely to donate a small amount, with **41.6% of donations coming in for less than \$10.**
- The biggest way to boost fundraising dollars? Activate peer-to-peer fundraising. On average, **events with peer-to-peer fundraising raised 709% more than those with simple donations only.**
- A simpler way to grow donation dollars is to enable a checkbox donation at checkout. The feature **increased the average amount raised to \$4,735 compared to just \$1,020 raised when an event only allows donations during registration.**
- Fundraisers that successfully sync their RunSignup and Facebook Fundraisers raised 177% more than those in 2022, but the added overhead of syncing means most fundraisers never sync their campaigns. In 2022, **89.3% of the total dollars raised by races with the integration enabled were made via the RunSignup Fundraising pages.**

Conclusions and Recommendations

- Create donation pages that appeal to a wide range of donors. Add donation levels that range from less than \$10 to more than \$1000 and add descriptive names that make the impact of the donation come to life.
- Peer-to-peer fundraising is a boon to fundraising-focused events. Cultivate your top fundraisers with financial and digital rewards throughout the fundraising process and provide personal reach-outs for your most ambitious fundraisers.
- Provide multiple opportunities for participants to donate, including during registration and via checkbox at checkout. Participants may skip through the registration process quickly, but still be willing to add a small donation in the final step when given a final, simple prompt.
- Support your fundraisers through tutorials, suggested language, and multiple options to share their fundraising pages on social media.

5.1

Donations

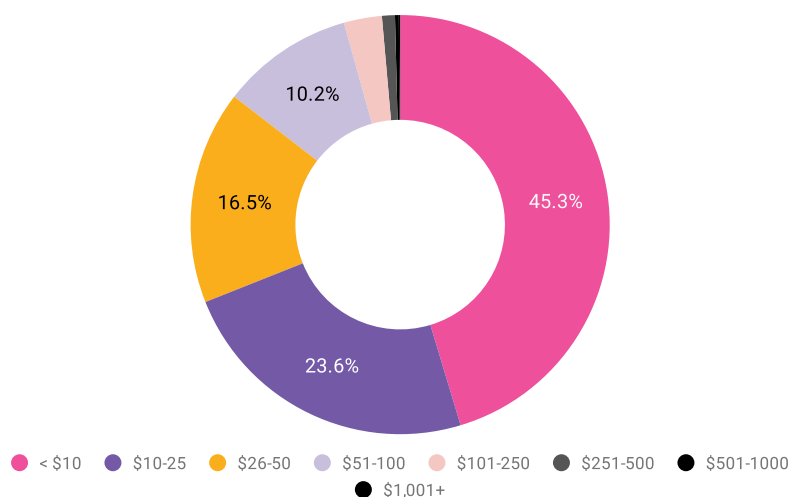
We examined both the average number of donations made on our platform and the value of those donations across 2022. Over the last year, the percentage of donations for less than \$10 has decreased, with a subsequent increase in donation amounts ranging from \$10-500.

66% of Donations Were for \$25 or Less Making Up 18% of Total Donation Dollars in 2022

Number of Donations by Dollar Amount

Amount of Donation	2018	2019	2020	2021	2022
<\$10	46.5%	46.0%	47.8%	45.3%	41.6%
\$10-\$25	24.9%	24.8%	24.2%	23.6%	24.5%
\$26-\$50	16.1%	16.2%	15.8%	16.5%	17.5%
\$51-\$100	9.0%	9.2%	8.8%	10.2%	11.3%
\$101-\$250	2.5%	2.7%	2.4%	2.9%	3.4%
\$251-\$500	0.8%	0.8%	0.8%	1.0%	1.2%
\$501-\$1,000	0.2%	0.2%	0.2%	0.3%	0.3%
\$1,001+	0.1%	0.1%	0.1%	0.1%	0.1%

Number of Donations by Dollar Amount in 2022

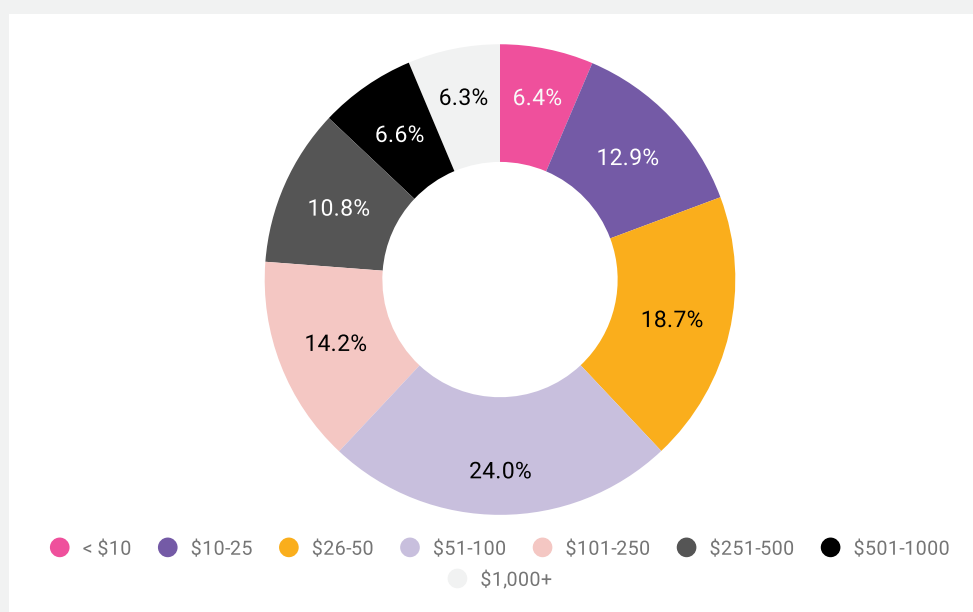


People are most likely to donate a small amount (41.6% of donations were less than \$10), but all those small donations still added up to 5.7% of the total donation dollars collected. On the flip side, 14.7% of donation dollars came from donations over \$500, despite a mere 0.4% of all donations being made in that amount.

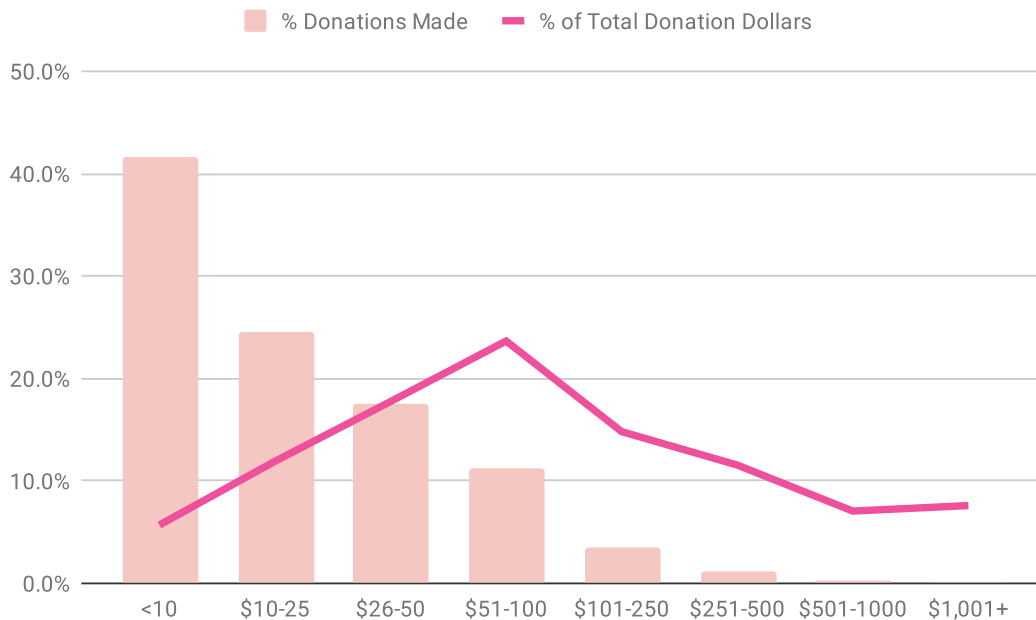
Total Value of Donations by Dollar Amount

	2018	2019	2020	2021	2022
<\$10	7.8%	7.5%	7.6%	6.4%	5.7%
\$10-\$25	15.2%	14.5%	15.3%	12.9%	11.9%
\$26-\$50	20.3%	19.7%	20.4%	18.7%	17.7%
\$51-\$100	23.6%	23.3%	23.7%	24.0%	23.7%
\$101-\$250	13.8%	14.5%	13.1%	14.2%	14.8%
\$251-\$500	9.6%	9.8%	9.6%	10.8%	11.5%
\$501-\$1,000	5.2%	5.5%	5.5%	6.6%	7.1%
\$1,001+	4.5%	5.2%	4.9%	6.3%	7.6%

Total Value of Donations by Dollar Amount in 2022



% of Donations Made vs. % of Total Donation Dollars



24% of Donation Dollars Came from Donations of \$51-100
Even Though Just 11% of Donations Were for \$51-100

Takeaways

- Welcome all donors. A single \$10 donation may not go very far, but the cumulative effect of many \$10 donations can be significant. Make every donor feel valued by including a low-dollar donation option and an automatic thank-you email.
- Encourage donors to increase their donation amount by setting donation levels based on real-world examples of the impact to your organization. You just might get an extra \$20 from a donor when they are confronted with just how much of a difference a little more money can make.
- Don't be afraid to ask for donations as high as \$1,000. While most donors will contribute smaller amounts, nearly a quarter of 2021 donation dollars came from donations over \$250, despite those making up only 1.4% of total donations. It just takes a few high-dollar donors to make a big difference!

5.2

Fundraising

There are three basic ways to raise more on RunSignup:

- Simple donations during registration
- Basic checkbox on the checkout page (with a pre-set donation amount)
- Peer-to-Peer Fundraising (where participants raise money from their own community)

Among the 18,000+ events that enabled some type of donation collection, those who engaged participants as fundraisers raised significantly more for their cause. Races that enabled fundraising saw significantly higher average totals of money.

Although this increase reflects the value of supporters who are willing to personally fundraise for causes they believe in, some of the trend is likely due to enhancements of our peer-to-peer fundraising software and an increase in the number of large, professional peer-to-peer fundraising events on the platform.

While peer-to-peer fundraising is the clear winner for organizations with committed supporters and the bandwidth to provide guidance, a check box on the checkout page is the most overlooked way to boost donations. Only a small percentage of events enable the checkbox, yet events that do raise markedly more money on average than those that only collect donations during registration.

\$8,254 Average Amount Raised by Events with Peer-to-Peer Fundraising
\$4,735 Average Amount Raised by Events with Simple Donations and a Check Box Option

Money Raised by Fundraising Type

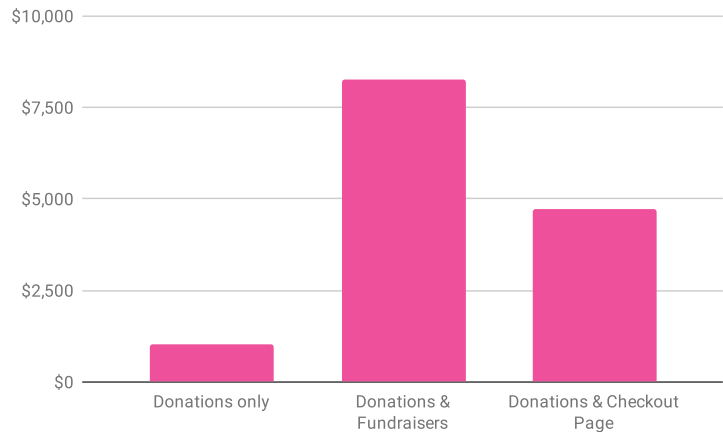
	Average Total Raised by Each Event					% of All Transactions (Including Registrations)				
Type of Donations	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
Donations Only	\$581	\$670	\$969	\$1,011	\$1,020	3.8%	4.0%	6.4%	5.5%	4.6%
Donations & Fundraisers	\$4,745	\$5,907	\$5,733	\$7,382	\$8,254	6.6%	7.7%	11.4%	11.6%	10.7%
Donations & Checkout Page	\$1,903	\$3,186	\$3,037	\$4,178	\$4,735	0.8%	1.6%	2.4%	2.5%	2.2%

Adding a Donation Checkbox Increases the Number of Donations by 311%

Number of Donations by Fundraising Type

	Number of Events					Number of Donations per Event				
Type of Donations	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
Donations Only	9,537	10,505	10,404	11,849	13,459	24	27	43	41	37
Donations & Fundraisers	2,068	2,288	3,116	3,460	3,893	91	111	107	121	126
Donations & Checkout Page	649	867	1,260	1,291	1,423	102	127	172	190	152

Races and nonprofits have long had a symbiotic relationship, with participants introduced to new causes and nonprofit supporters joining new events. Despite the financial tumult of the last few years, fundraising continues to hold a central role at events.



Takeaways

- Peer-to-peer fundraising is the clear leader if you want to *maximize* fundraising dollars. However, peer-to-peer fundraising isn't a set-it-and-forget-it enterprise: if you're interested in engaging fundraisers, make sure you have the resources to inspire and support them. If you can do that, you may just build lifelong advocates for your cause!
- On the flip side, enabling the checkbox option on checkout is incredibly easy for both you and the donor. But the results aren't small – races with the checkbox enabled raise more than 4 times as much and collect donations from significantly more donors.

5.3

Facebook Fundraising

RunSignup first introduced the RunSignup – Facebook Fundraiser Integration in July of 2019 and it quickly became a valuable resource for fundraising events. In 2022, \$1.1 million dollars were raised on Facebook through the integration.

However, with recent changes at Meta, some nonprofit organizations have reported issues with the integration, and as of this writing, we are still awaiting a fix from Meta to the Fundraiser API to

resolve our customers' issues. We've seen value from the integration to our customers in the last few years, and hope that Meta will continue to support their success – but in the meantime, some caution is recommended.

Luckily, the vast majority (89.3%) of donations collected through the integration were actually made on RunSignup in 2022.

Percent of Donations via Facebook and RunSignup

Type of Donations	2019 % of Donations	2020 % of Donations	2021% of Donations	2022 % of Donations
Facebook	6.4%	15.0%	13.1%	10.7%
RunSignup	93.6%	85.0%	86.9%	89.3%

Fundraisers Raise 177% More When They Sync Their RunSignup and Facebook Fundraisers

To get a sense of the impact that RunSignup's free Facebook Fundraiser Integration can have on the efforts of individual fundraisers, we looked at the top 100 events using the integration in 2022 (those with the highest volume of donations). On average, connected fundraisers raised 177% more than those who only raised money via RunSignup.

While this data is volatile year over year due to the small sample size evaluated, one thing has been clear every year: the ability to connect to a Facebook fundraiser helps fundraisers reach a wider audience and solicit more donations.

Top 100 Events with Facebook Fundraising Activated

	2020	2021	2022
Average # Donations on Facebook	5.1	6.7	5.2
Average Amount Raised on Facebook	\$239.53	\$372.30	\$277.72
Average # Donations on RunSignup	1.3	1.2	0.9
Average Amount Raised on RunSignup	\$91.51	\$115.09	\$100.19

Takeaways

- Fundraisers benefit from the reach available when they share their fundraising page on Facebook, and it's worth keeping an eye on the status of the RunSignup – Facebook Fundraiser integration. Regardless, work on campaigns to encourage your fundraisers to share their RunSignup fundraising pages across social media platforms.
- Keep fundraisers engaged with fun milestones and badges to reward them for their efforts and encourage them to keep sharing their fundraising page.



Race directors take to [the Raceday CheckIn App]. It's very easy to train volunteers and there are less lines at packet pickup. With the RaceDay CheckIn App, we're able to help race directors. And then, when another timer comes after one of my races, if they don't have that same suite of products to offer the race director, they don't have much of a chance of taking that race away from me."

- SHAWN DOUGHERTY
Good Times Event Services



06

RaceDay Trends

RaceDay Trends

Key Findings and Trends

- **Race day registrations made up 2.4% of all race registrations in 2022**, a total of 9.5% of all the registrations on race week.
- The improved RaceDay CheckIn App saw widespread use in 2022, with **10.1% of events using the RaceDay CheckIn App to check-in a record 32.1% of participants.**
- RaceJoy, the GPS-based runner-tracking app, saw record engagement in 2022, with **196,150 spectators tracking 128,194 participants and sending an incredible 755,052 cheers.**
- Timers are more than just timers, with 78% of timers reporting that they offer services beyond race timing. Timers continue to expand their roster of services, too, with **36.3% of timers adding new services in 2022.**

Conclusions and Recommendations

- Race day registrations are inevitable and can provide a last minute bump to your registrations. Leave online registration open until the gun goes off and add on-site signage with QR codes and quick text links to encourage participants to skip the line and register on their own mobile devices.
- An efficient check-in process ensures happy participants and limited time in line. Create configurations and presets for your volunteers that will enable them to see all the information they need, while limiting the opportunity for human error.
- Make your race more interactive by helping on-site and remote spectators engage with their runners through RaceJoy's interactive features. Want to get even more cheers? Link to easy how-to's on your website to educate your spectators and participants.
- Savvy timers are nimble and trusted as industry experts. Diversify your services to expand your market share and build your book of business.

6.1

RaceDay Registration

Anecdotally, we've been hearing tales of worsening procrastination as a result of the pandemic for years. While our race week data doesn't really back that up, there was a slight uptick in RaceDay registrations this year. In 2022, 2.4% of all registrations took place on race day, a total of 9.5% of race week registrations.

Percent of Registrations on Race Week and Race Day

Year	% of Race Week Registrations on RaceDay	% Total Registrations on RaceDay
2018	9.0%	2.2%
2019	9.3%	2.3%
2020	11.8%	3.1%
2021	8.9%	2.2%
2022	9.5%	2.4%

10% of Race Week Registrations Processed on Race Day

Takeaways

- Maximize registrations by leaving online registration open until the gun goes off, allowing people to register from their laptops before they leave their house, or their phones as they arrive in your parking lot. Post on-site signage with QR Codes and quick text options to encourage people to skip the line and register on their own from their own devices.
- Offer on-site kiosks (instead of paper forms) for those uncomfortable registering on their phones and sync your registration with your timing software to keep your data accurate and your volunteers happy.
- Reduce frustration and get people out on course quickly by limiting the questions asked during RaceDay registration to the absolute essentials.

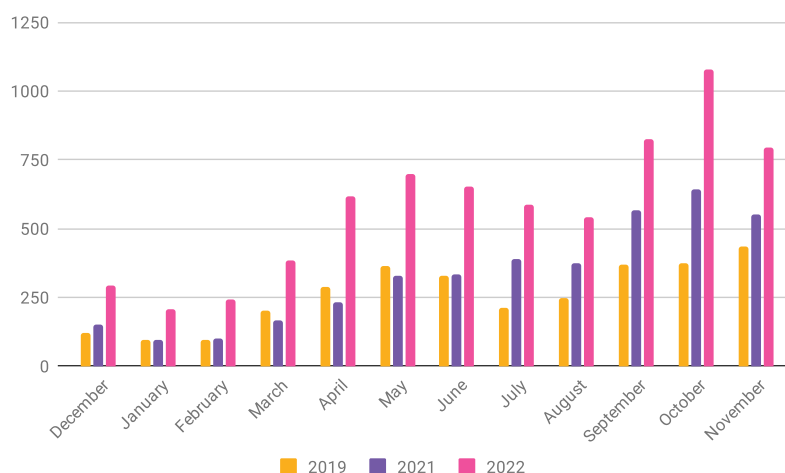
6.2

RaceDay CheckIn App Usage

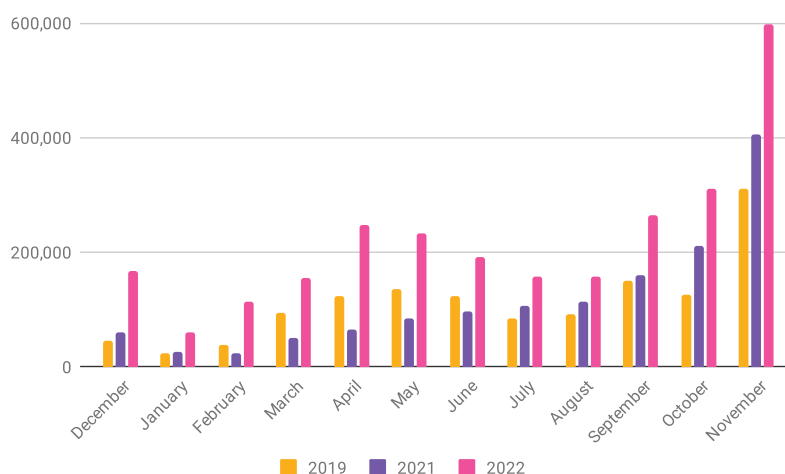
Usage of the RaceDay CheckIn App has grown tremendously over the past few years, especially since the release of a new and improved version in 2021. In 2022, the app saw a significant increase in both the percentage of races using the app for CheckIn (10.1%) and the number of overall participants checked in via the app (32.1%).

32% of all 2022 Participants were Checked In with the RaceDay CheckIn App

Races Using the RaceDay CheckIn App



Participants Checked In by the RaceDay CheckIn App



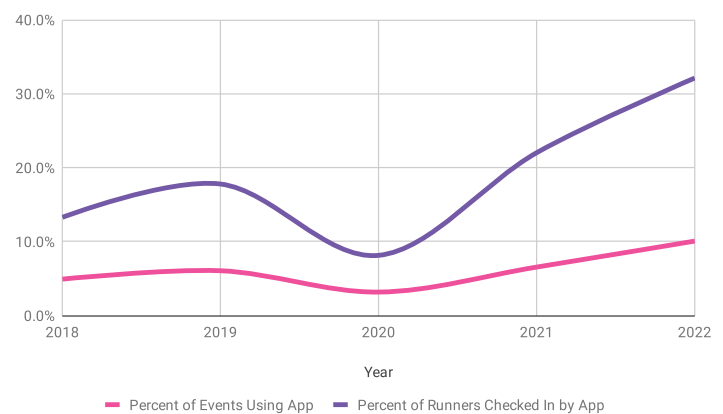
The percentage of participants checked in by the app continues to grow at a faster rate than the number of events utilizing the app. While that indicates that the app is often relied on to manage larger events that need to check-in many people quickly and efficiently, races of all sizes are opting for the CheckIn App for a smoother bib pickup. In 2022, the app was used by more than 3,000 races with fewer than 200 participants – and also by races as large as 17,000+ participants.

CheckIn App Usage

Year	Participants Checked in by App	Participants Not Checked In by App	Events Using CheckIn App	Events Not Using CheckIn App	% Runners Checked In with App	% Events Using the CheckIn App
2018	820,285	5,357,381	2,102	40,636	13.3%	4.9%
2019	1,300,495	6,011,527	3,008	46,663	17.8%	6.1%
2020	383,492	4,329,888	1,486	45,407	8.1%	3.2%
2021	1,405,871	4,979,795	3,922	55,963	22.0%	6.5%
2022	2,662,177	5,626,935	6,918	61,802	32.1%	10.1%

Percent of Runners and Events Using App

17,455 Participants Checked In by Largest Event Using the RaceDay CheckIn App But 3,000 Races Also Used the App to Check in Fewer than 200 Participants



For the second year in a row, in the 2022 Timer Survey (see sections 6.6-6.8), responding timers voted the RaceDay CheckIn App as the RaceDay product they were **most** happy with.

Takeaways

- Customize your RaceDay CheckIn App presets and configurations to give your on-site CheckIn team all the information they need while limiting opportunities for human error. Then, keep all your check-in data in one place by using the RaceDay CheckIn App to track your volunteers as well as your participants.
- Train your volunteers to operate the RaceDay CheckIn App on their own devices for a speedy and efficient packet pickup with limited technical support. Don't forget to bring a few backup devices and power supply options just in case!
- Save money in 2023 with dynamic bib assignment via the RaceDay CheckIn App. If your timer is up for it, it'll reduce pre-race overhead and save chip costs – and with the RaceDay CheckIn App's label printing capabilities, you can still add professional labels to your bib.

6.3

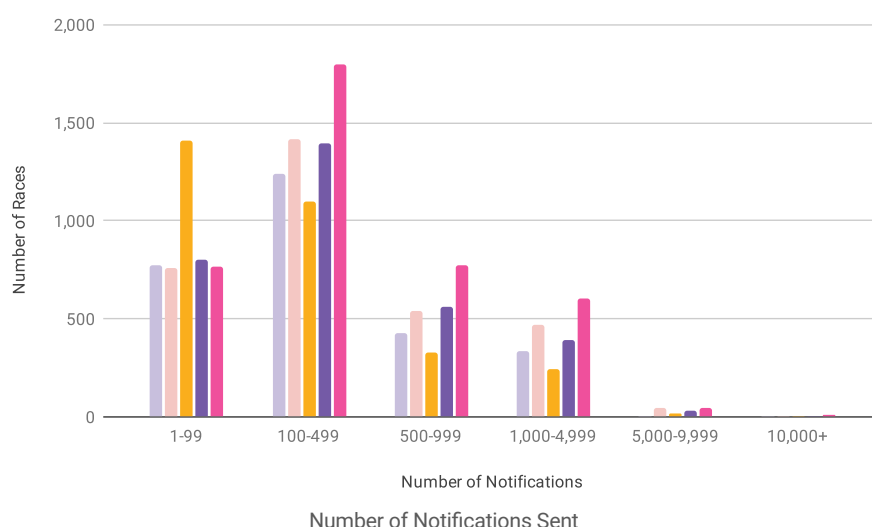
Scored Results Notifications

More races sent results notifications in 2022 than in any year prior, with nearly 4,000 events providing notifications. The most noticeable trend over the last few years has been an increase in large events offering notifications (12 events sent more than 10,000 notifications each) and a subsequent reduction in the percentage of events sending just a small number of notifications. However, plenty of small races still provide notifications – in 2022,

64% of the events that sent notifications sent fewer than 500 of them.

Even as newer technologies like GPS tracking become integrated into events, results notifications remain a core way that races can keep participants happy. The best part? Even small races can offer a big race experience via notifications.

Number of Events vs. Number of Notifications Sent



Number of Notifications	2018 # of Events	2019 # of Events	2020 # of Events	2021 # of Events	2022 # of Events
10,000+	5	5	3	3	12
5,000-9,999	3	42	20	33	43
1,000-4,999	335	468	244	392	606
500-999	424	543	330	563	773
100-499	1,239	1,415	1,097	1,394	1,798
1-99	774	759	1,408	800	766

Takeaway

- Runner tracking is key to engaging spectators (even those from a distance) and creating a better race experience. Consider a range of technologies to bring your race day to life for participants and spectators of all technology comfort levels. A combination of GPS tracking and results notifications will allow a range of people to interact with your event.

6.4

The Race Director

The Race Director scoring software, our legacy scoring software created by Roger Bradshaw, inched closer to pre-pandemic usage rates, with 13,676 events utilizing The Race Director to score 4,925,025 participants. However, this is an incomplete look at the scoring of races as timers continue to move from The Race Director software to the next generation scoring software, RaceDay Scoring. For more information on usage of both systems, see section 1.5.



The Race Director Usage

	2018	2019	2020	2021	2022
Total Races	15,403	15,340	5,078	10,259	13,676
Total Participants	4,996,330	6,438,967	1,452,755	3,409,159	4,925,052
Average Race Size	324	420	286	332	360

Takeaway

- Look for scoring software data to continue to shift over the next few years as legacy scoring options are replaced with newer technologies. For timers who need to train staff on a rolling basis, look for newer options with an easy learning curve.

6.5

RaceJoy GPS Tracking

RaceJoy had yet another record setting year, with more spectators tracking runners than ever before. With the continued reduction of virtual events (and subsequent ability to race and spectate in-person), we saw a decrease in events using RaceJoy compared to 2021.

The RaceJoy App is currently available through any Certified Timer, making it an accessible option for events seeking a low-cost solution to runner tracking.

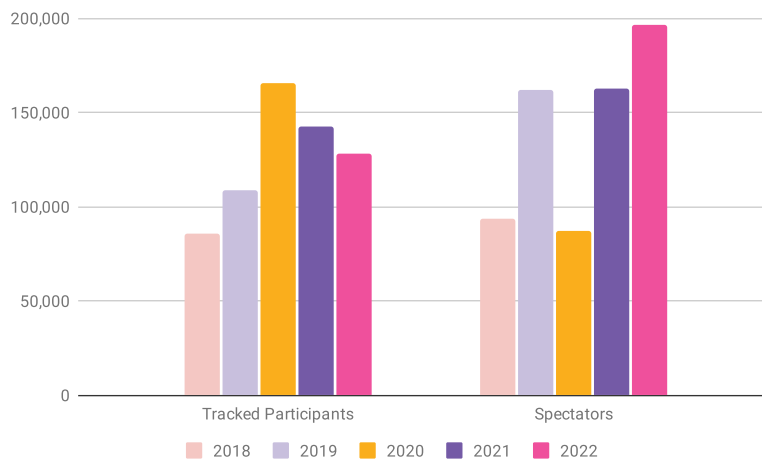
However, with more timers certified to offer RaceJoy and more races familiar with the technology, the number of events offering RaceJoy still exceeds pre-pandemic levels. In addition, engagement through the app has increased, with higher numbers of participants tracked and more spectators following along. In 2022, 27.9% more progress issues were sent and 57.5% more cheers were issued than in 2021.



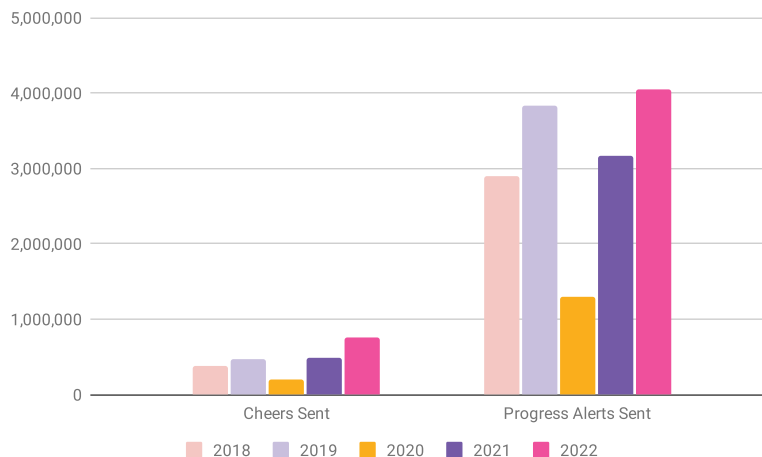
RaceJoy Usage

RaceJoy Usage	2018	2019	2020	2021	2022	Change 2019-2022	Change 2021-2022
Races	197	410	1,097	1,215	829	102.2%	-31.8%
Tracked Participants	86,005	108,451	165,373	142,650	128,194	18.2%	-10.1%
Spectators	93,513	162,109	87,038	162,735	196,150	21.0%	20.5%
Progress Alerts	2,904,057	3,823,954	1,303,158	3,168,372	4,052,806	6.0%	27.9%
Cheers Sent	381,245	477,053	198,375	479,363	755,052	58.3%	57.5%

RaceJoy Usage: Tracked Participants and Spectators



RaceJoy Usage: Cheers and Progress Alerts Sent



Takeaways

- The increased spectator tracking and cheer sending indicates that participants and spectators are embracing the on-site experience. To capitalize on this trend, it's important for races to consider spectator engagement services like RaceJoy in addition to traditional chip-based tracking options.
- A fun and supportive race experience is key to welcoming newer runners to your race course.

Provide technology that makes the race more fun and allows runners to bring their community along on the run.

- Link to RaceJoy how-to's on your website and send automated RaceJoy reminder emails to ensure that your participants and their spectators can get the most out of the app on race day.

2022 Timer Survey Purpose & Methodology

Purpose:

RunSignup issues an annual timer-specific market survey to help us understand the unique needs of timers. This information is used to provide industry insights to timers and helps guide our technology road map. In 2022, we looked at:

- The profile of a timing company
- The types of services offered by timing companies
- The role of remote timing
- Trends in technology usage

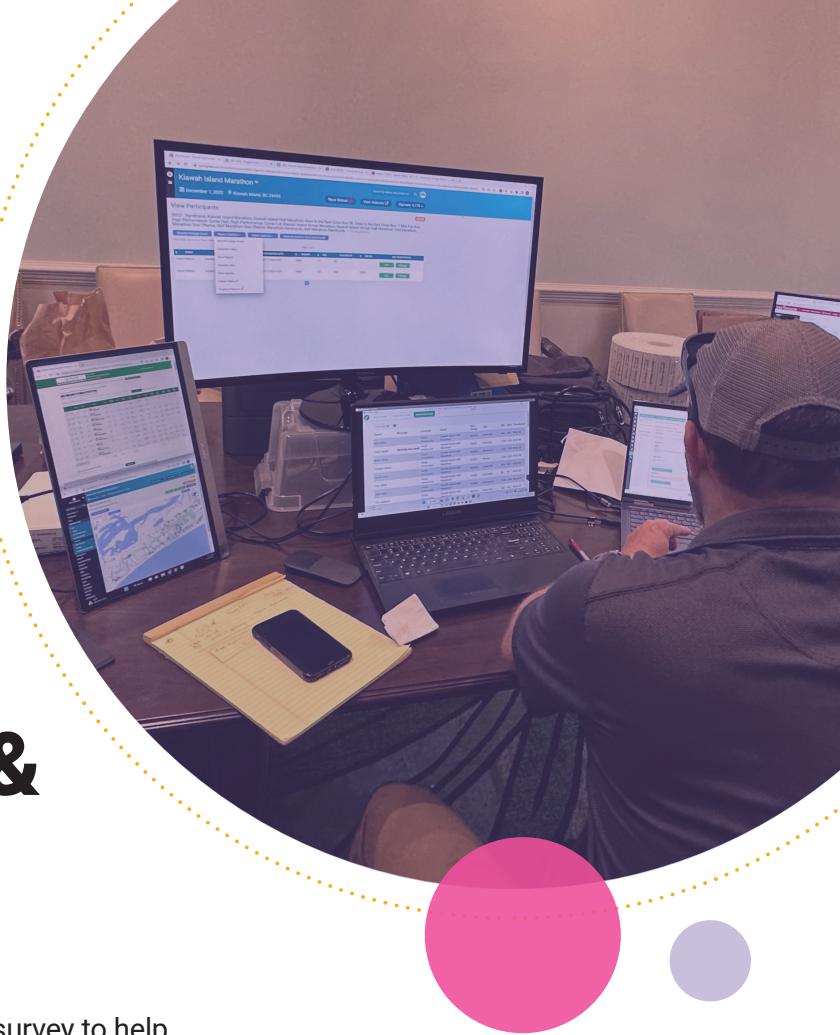
Contact and identifying information was not required for participation in the survey.

Survey Collection

This timer-specific survey was issued in November of 2022. Timers were reached for response in multiple ways, including through email (to RunSignup's email list), through partner organizations, on RunSignup's social media and blogs, and through Facebook groups targeting timers.

While efforts were made to reach timers outside the RunSignup network, it can be assumed that RunSignup users are overrepresented in the sample, influencing answers about software and hardware choices.

☰ 217 Survey Responses



6.6

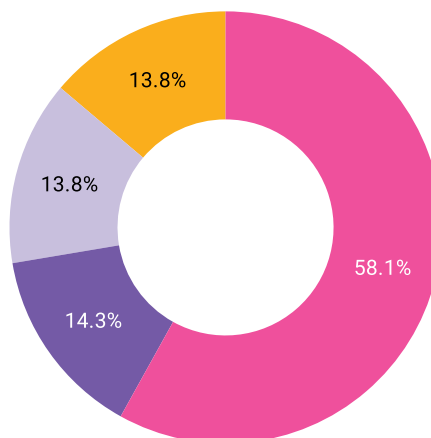
The Timing Business

The following set of questions establishes the ownership, staffing patterns, and scope of timing businesses. Notably, while 86.2% of respondents indicated that they owned part or all of the timing business, a majority of them (62.7%) noted that they also work at least a part-time job outside of timing.

63%

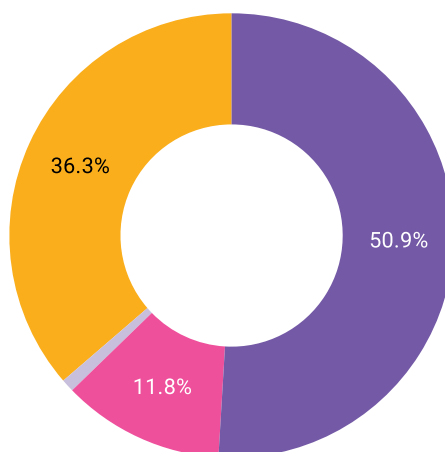
**of Timers Also
Work a Part or
Full-Time Job**

Do You Own or Partially Own a Timing Business?



● I'm the head honcho
 ● My spouse & I are co-head honchos
 ● I co-own it with one or more partners
 ● I work for someone who thinks they are the head honcho

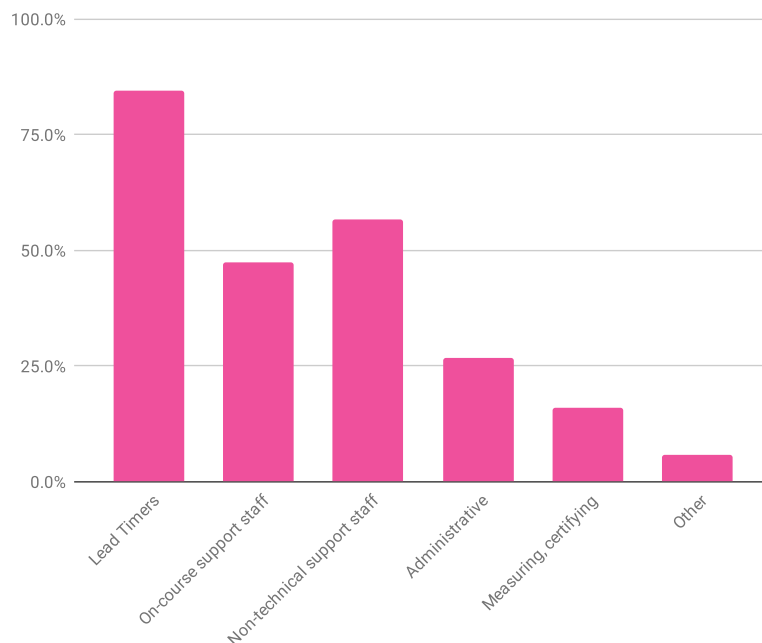
Do You Have Another "Real" Job?



● Yes, I have a full-time job separate from timing
 ● Yes, I have a part-time job separate from timing
 ● Because of COVID-19, I had to get another job
 ● No, timing related services is my job

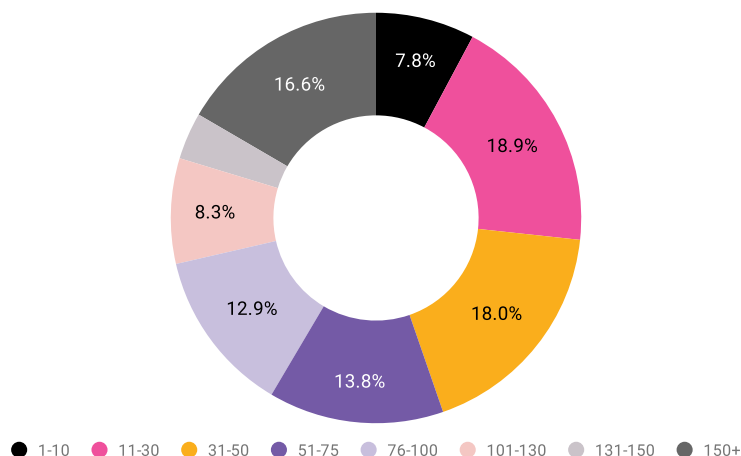
What Types of Staff is Involved With Your Timing Business?

Unsurprisingly, lead timers are the most commonly employed staff. On-course and non-technical support staff are the next most common, with some companies also employing administrative positions and/or people to measure and certify courses.



How Many Races Do You Time or Provide Other Race Day Services To?

Despite small teams and other jobs, timing companies are productive, providing services to dozens (or even hundreds) of events each year. While businesses range widely in scope, an impressive 55% of them support more than 50 events each year.



29% of Timers Provide Services to More than 100 Races Per Year

Takeaways

- Despite being a crucial piece of the endurance industry, race timing companies are typically small teams with hands-on owners. Regardless, they provide services to a wide range of events each year, with 92.2% of them working with more than 10 events each year.
- Timing companies work with many races each year, and as such, are positioned to provide recommendations and advice to races on a variety of topics. Have a question? Ask your timer.

6.7

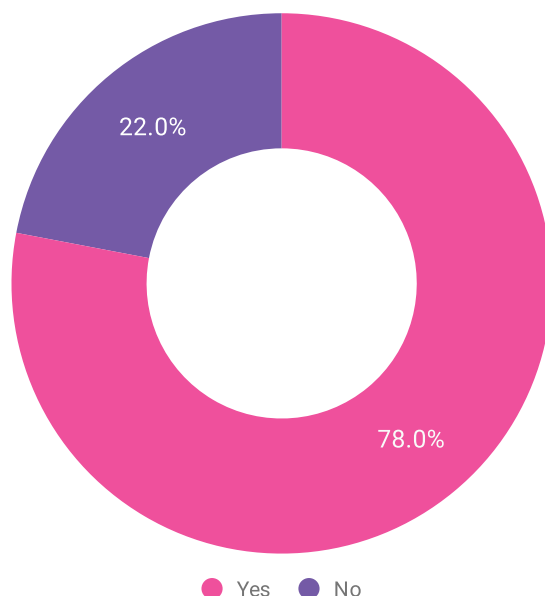
Event Services

Do You Provide Services Outside of Timing?

The majority of timers (78%) offer additional services beyond race timing, a number that has remained steady over the previous 4 years. Providing an array of services can help timing companies increase profit margins and remain competitive in a tough market.



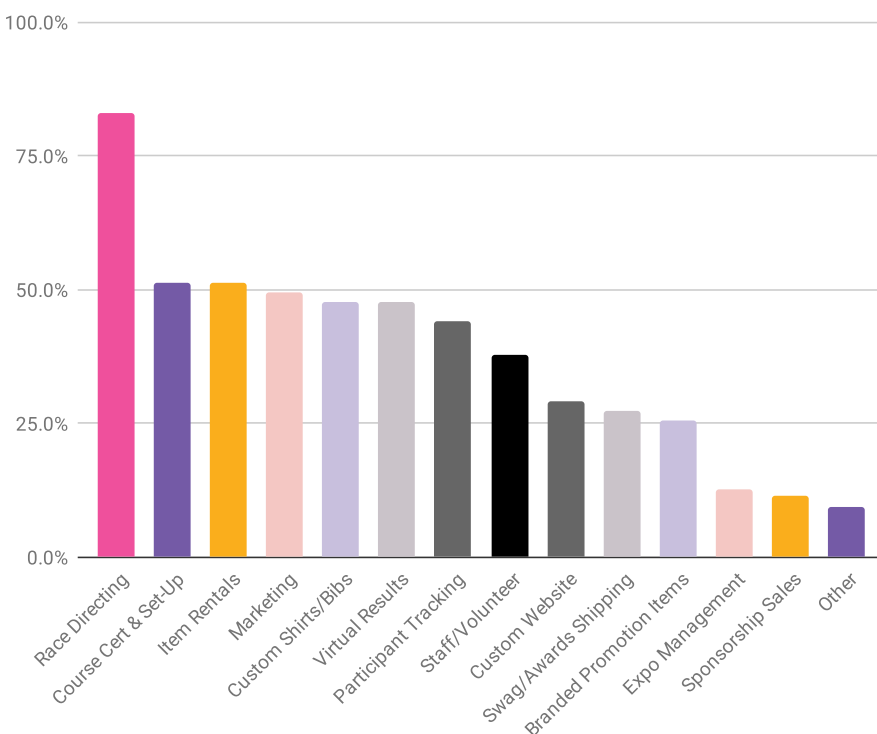
Do You Provide Services Outside of Timing?



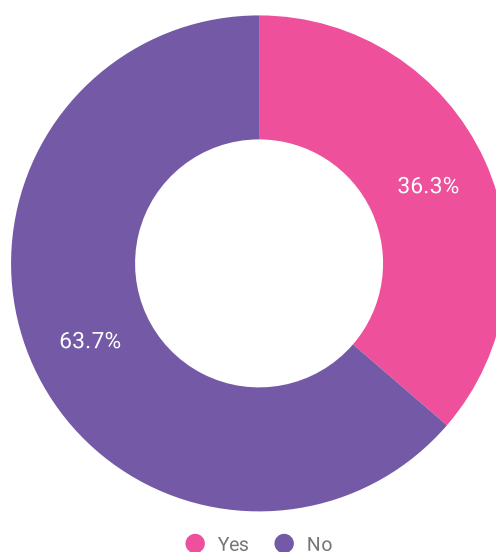
The most common services offered by timers include race directing, course certification & setup, equipment rental, and event marketing.

What Other Services Do You Provide?

Timers continue to expand their range of services, with 36% of timers adding new service offerings in 2022. New service options included video streaming, photography & photo tagging, race day registration & check-in, and more.



Did You Start Offering New Services or Technology This Year?



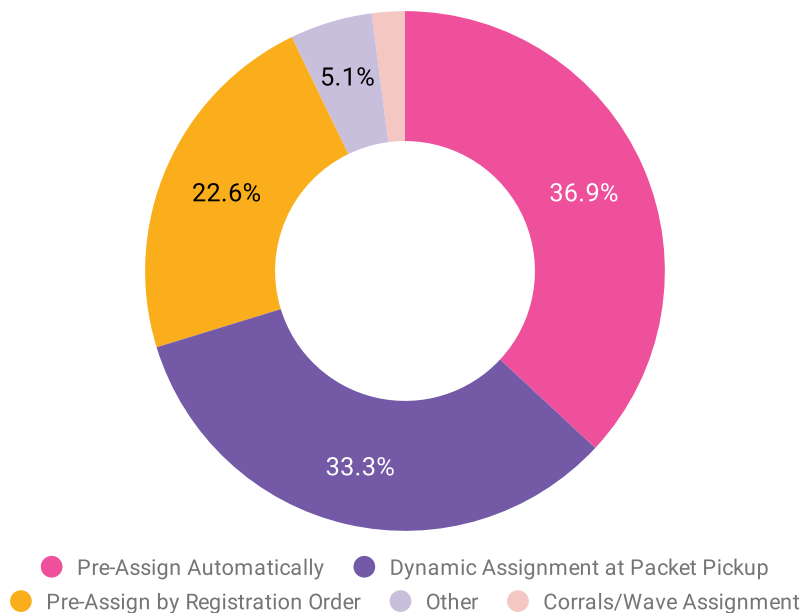
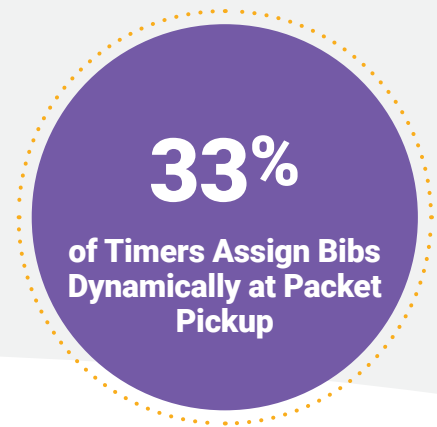
Takeaway

- Profit margins in race timing are small, with many providers supplementing their timing income with an outside revenue source. To maximize every race relationship, consider expanding your roster of services with add-on services.

6.8

Bib Assignment

As technology and participant behavior have evolved, so have timing processes. In 2022, a third of all timers reported that they assign bibs dynamically at packet pickup rather than relying on legacy processes like pre-assigning bibs alphabetically or by registration order.



Takeaways

- Opting for dynamic bib assignment to reduce waste and speed up the packet pickup process? Customize the presets and configurations in your RaceDay CheckIn App to prevent human errors in assigning. Set up bib number validation, prevent duplicate bib numbers, and connect with a label printer to keep the right bib with the right runner.
- There's no one "right" way to assign bibs. Take the unique needs of your race into consideration and keep open communications between race directors and timers to ensure an easy race morning.

6.9

Timing Technology

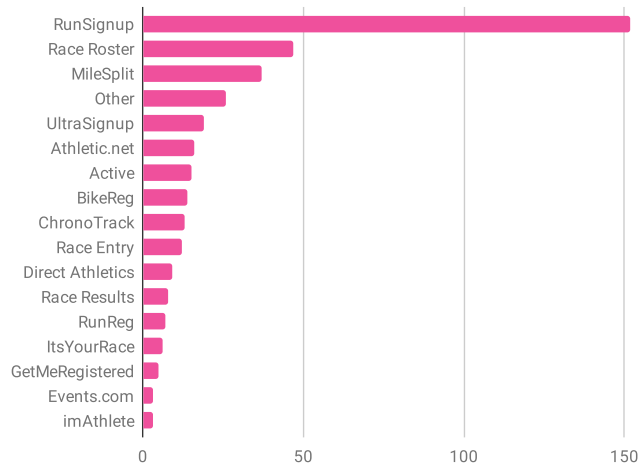
While timers don't always manage registration for races, their position as technology experts in the endurance industry helps us understand trends in registration technology.

Responses in this section are likely impacted by the disproportionate number of RunSignup users in the sample, with an overrepresentation of technology that more tightly integrates with RunSignup. Where possible, we included both responses from our survey and data from The Race Director software (shown in section 6.4) to provide additional context.

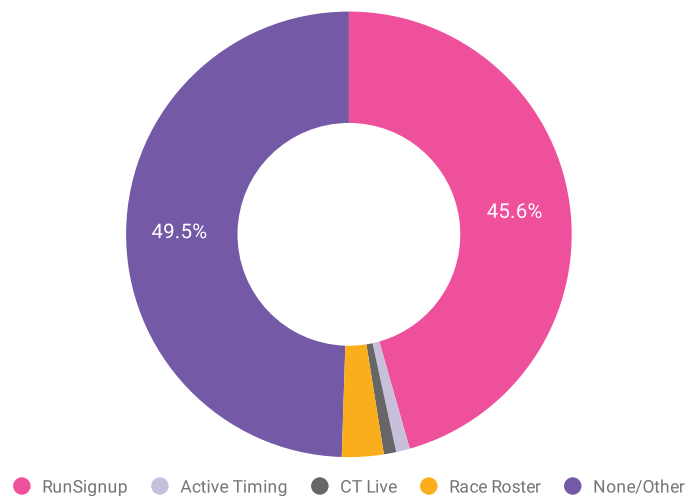
Registration Company

As expected, RunSignup was the most used registration platform by both the timer survey, and Race Director users. As the endurance registration market has contracted over the last few years, this once-extensive list has shrunk to a relatively small group of registration options.

Registration Company (from Timer Survey)



Races by Registration Company Integration (from Race Director data)



Timing Hardware

Next, we looked at timer preferences for timing hardware. The set of data from The Race Director has some bias – IPICO, RFID, and MYLAPS timers are more likely to use The Race Director, whereas ChronoTrack timers often use RunScore or CTLive. However, looking at both Race Director data and survey data provide a larger sample of the market.



Race Director Data

Timing Hardware	% Using
IPICO	16.7%
RFID	21.5%
MYLAPS	22.0%
None	7.4%
ChronoTrack	10.0%
RACE RESULT	7.4%
Trident	10.3%
Other	4.6%

Timer Survey Responses

Timing Hardware	% Using
MYLAPS	27.3%
FinishLynx	22.2%
Agee Race Timing	18.0%
RACE RESULT	17.0%
IPICO	14.4%
ChronoTrack	13.4%
Trident	12.9%
RFID	11.3%
Other	9.8%
None/Manual	7.7%
RM Timing	4.6%
Jaguar	2.6%
ABM	1.6%
Blue Box	1.6%
J-Chip	1.6%
Summit	1.0%

MYLAPS Hardware Was Used by 27% of Survey Respondents and 22% of Races Scored by The Race Director

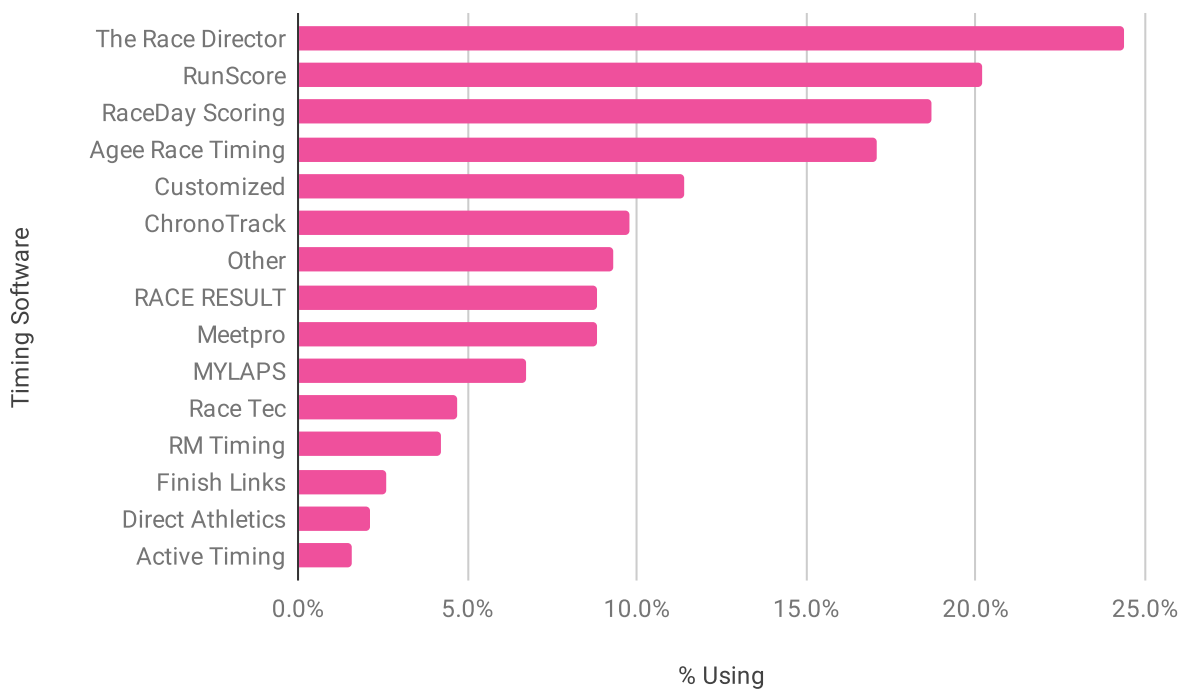
Scoring Software

After years of market dominance by The Race Director and RunScore, the 2022 software preferences show more variety. The top four responses, including RaceDay Scoring and Agee Race Timing in addition to the two legacy platforms, were each used by 17-24% of respondents. While the dominance of RunSignup owned software (The Race Director and RaceDay Scoring) is likely

impacted by the customer-heavy sample, adoption of RaceDay Scoring is increasing with new timers coming into the industry and the approaching sunset of The Race Director.

Two notes on this question: 1) timers who use more than one software solution, depending on the circumstances, could indicate both options, and 2) respondents were asked to exclude track & field events in their response.

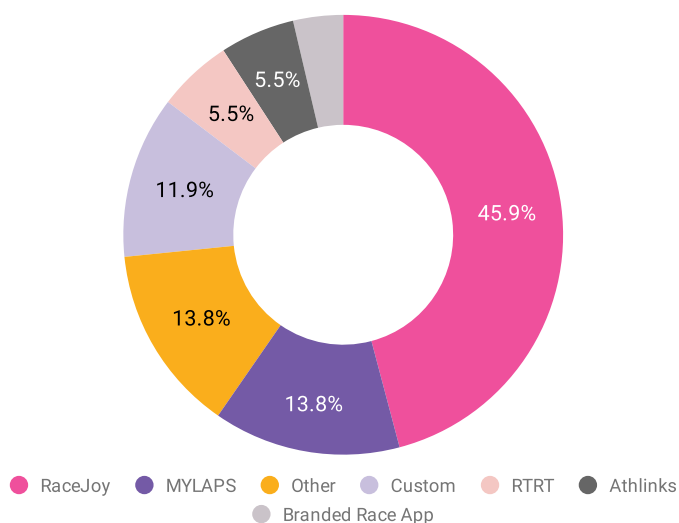
Scoring Software (Survey Respondents)



Participant Tracking

Timing isn't only about results, with timers often providing participant tracking both during and after the event. While RaceJoy was the most frequently offered, timers also offered tracking via MYLAPS, RTRT, Athlinks, and custom apps.

If You Are Using an App to Provide Tracking, Which One Do You Use?



Takeaways

- The timing market has a range of technology options for registration, software, hardware, and tracking solutions. Don't get complacent with older technology that hasn't been modernized to meet the fast-paced demands of timing in 2023.
- Set aside time to learn new technologies and pick those with a fast learning curve and robust set of documentation to help get your entire team trained, fast.



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