RaceTrends
ANNUAL STATISTICAL REPORT

15/18

Run Signup

table
of contents

intro
and methodology

Tens of millions of people participate in endurance events each year. After several years of ballooning participation, the industry is flooded with concerns that the running bubble has popped. However, for event directors, real data about the state of industry remains elusive.

We mined RunSignup's registration data from the past four years to generate transparent statistics, identify trends in the industry, and provide recommendations to keep endurance events competitive in a crowded market. In this report, we quantify and explore:

- General growth trends and statistics
- Marketing strategies and results
- Patterns in registration
- How races maximize their fundraising potential
- The impact of RaceDay technology

Our statistics come from RunSignup's registration and result data. The sample includes races with more than 2 people registered[1]. In order to collate the data for publication in early 2019, 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.

---

1   Includes both online registrations and participant imports.

trends
of races and participants

RACE TYPE	# RACES 2015	# RACES 2016	# RACES 2017	# PARTICIPANTS 2015	# PARTICIPANTS 2016	# PARTICIPANTS 2017	# PARTICIPANTS 2018
Overall	21,150	31,357	37,472	3,560,588	4,983,970	5,060,076	6,228,326
5K and less	12,382	17,766	21,132	1,930,06	2,797,52	3,158,12	3,784,837
10K and less	1,957	3,187	3,324	352,227	540,756	644,334	840,115
Half Marathon and less	997	1,438	1,894	334,483	533,129	549,626	781,374
Marathon and less	424	655	774	66,547	123,366	121,760	189,670
Ultra	310	497	647	32,484	50,837	55,275	71,875
Triathlon	464	711	1,009	34,166	64,048	85,604	101,927

A large "fun run" race series that accounted for over 800,000 registrations in 2016 did not use RunSignup in 2017. We replaced those fun run participants with another 800,000 participants from more traditional endurance races, which creates some skewing of data during that period of transition.

We welcome further feedback - please direct comments to Johanna Goode - johanna@runsignup.com.

race growth
& signup trends

1

KEY FINDINGS AND TRENDS

- RunSignup saw a **23.1% increase in the number of registrations** from 2017 to 2018.

- However, when we compared races that were held in 2017 AND 2018 with registration on RunSignup, **participation numbers were essentially even:** 4,336,935 in 2017 and 4,331,563 in 2018. This reinforces general reports of flat to declining number of race finishers from Running USA and the New York Times.

- 18.4% of participants in 2018 had run that race in the previous year**. Twenty-four percent of 10K runners were repeat participants,** whereas marathons, triathlons, and ultramarathons retained 14%, 9%, and 13% of participants respectively.

- **Registration prices increased** across all race distances except the ultramarathons; which decreased 4.2%.

2

CONCLUSIONS

- Participation is relatively steady from race to race and overall registrations are still increasing on RunSignup. This indicates that runners are seeking diversity in their participation - trying new events each year, and prioritizing events with unique, fun elements (and often, those that are untimed).

- Repeat finishers are elusive for longer distances, and turnover rates are high for all events.

- Marathons reversed its participation decline in 2018 even with an increase in registration pricing.

3

RECOMMENDATIONS

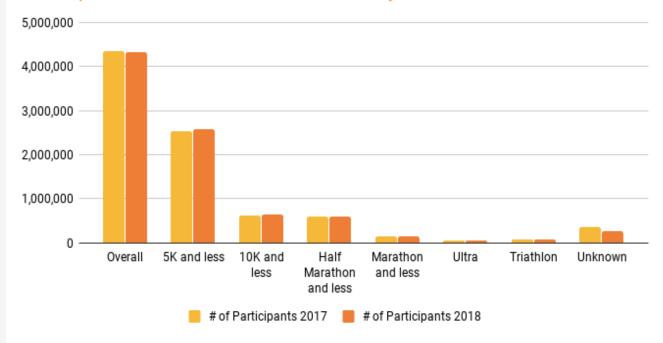- Cultivate a distinctive brand for your race and use email marketing, social media, and referral programs to reinforce the message that your race is unique.

- Take advantage of your Race CRM to maintain year-round communication with your participants and encourage participation across your events.

- Broaden your base by offering something for everyone - multiple race distances and price points that increase over time.

race growth 1.1

Races that used RunSignup in 2017 and 2018 remained about the same with a slight decrease of -0.1% on a per race basis. While this does indicate a tight marketplace for events, it also suggests that the pool of participants is relatively steady across the entire industry.

As the market continues to tighten, brand loyalty and efficient, inexpensive marketing are increasingly key to creating sustainable events. Two trends that we see in many successful race organizations are

the cross-promotion of events in their purview and year-round communication.

The cross-promotion of events enables large organizations to leverage their participant data, keeping runners in their revenue stream even when they are seeking new race experiences. A Race CRM that tracks participant history allows a race organization to find multiple personalized touchpoints throughout the year - keeping them engaged and thinking about races even during the offseason.

Participant Totals For Renewed Races Only

RACE TYPE	# RACES 2017	# RACES 2018	# PARTICIPANTS 2017	# PARTICIPANTS 2018	GROWTH
Overall	25,310	26,356	4,336,935	4,331,563	-0.1%
5K and less	14,034	14,452	2,525,323	2,587,402	2.5%
10K and less	2,493	2,675	616,472	635,430	3.1%
Half Marathon and less	1,626	1,729	595,103	590,548	-0.8%
Marathon and less	627	629	135,477	135,256	-0.2%
Ultra	418	446	37,906	38,846	2.5%
Triathlon	818	903	73,587	74,721	1.5%
Unknown	5,294	5,522	353,067	269,360	-23.7%

takeaways

1

Use your Race CRM to create more personalized marketing - participants who feel valued will value your event. Personalized marketing can include targeted Facebook ads, email marketing that evokes memories of previous race participation, and coupons that reward loyalty.

2

Focus on what makes your race special. Whether it's a beautiful race course, premium swag, a fun theme, or a no-frills approach, embrace your identity and hammer it in all your marketing. Participants are facing a plethora of choices and it is essential that you create a narrative that your race is unique in the marketplace.

repeat participants 1.2

Across all distances, 18% of registrants ran the race in the previous year. Twenty-four percent of all 10K runners were repeat participants in 2018, whereas marathons, triathlons, and ultramarathons retained 14%, 9%, and 13% of participants respectively. Short races should explore loyalty programs to entrench themselves in the traditions of their participants. On the flip-side, longer events - with their more intensive training and travel commitments - must include extensive community outreach to bring in new runners each year.

2018 Repeat Participants

of Registrations 4,069,769   # of Repeats 748,549

RACE TYPE	# OF REGISTRATIONS	# OF REPEATS	REPEAT %
Overall	4,069,769	748,549	18%
5K and less	2,448,225	435,595	18%
10K and less	584,478	141,680	24%
Half Marathon and less	567,785	114,813	20%
Marathon and less	130,039	17,659	14%
Ultra	34,683	4,471	13%
Triathlon	69,702	6,037	9%
Unknown	234,857	28,294	12%

takeaways

1

Even for long races with small numbers of repeat participants, word of mouth is key. Identify your most loyal participants - those that have returned several times - and turn them into virtual ambassadors with referral rewards programs.

2

Maximize the efficiency of your referral programs by offering both refunds and swag rewards. Adding swag rewards to a referral refund program increases the percentage of registrations from referrals from 6% to 11.6%.

3

Expand the options at your race with a variety of race differences, allowing participants to return to your event regardless of ups and downs in their training schedules.

pricing 1.3

Average registration prices increased in 2018 for every distance except ultramarathons, with relatively aggressive increase percentages. These increases could reflect rising permitting costs, an increased emphasis on expensive swag and post-race parties, or an effort by events to increase revenue amongst concern about falling participation. and post-race parties, or an effort by events to increase revenue amongst concern about falling participation.

RACE TYPE	2015 AVG PRICE	2016 AVG PRICE	2017 AVG PRICE	2018 AVG PRICE	INCREASE
5K	$25.68	$25.75	$26.38	$26.48	0.4%
10K	$31.92	$31.78	$33.10	$34.91	5.5%
Half Marathon	$57.69	$61.21	$64.46	$67.58	4.8%
Marathon	$87.49	$85.93	$84.13	$94.11	11.9%
Ultra	$102.42	$102.10	$112.38	$107.70	-4.2%
Triathlon	$90.09	$87.42	$89.18	$89.69	0.6%

Average # of Price Increase

RACE TYPE	2015	2016	2017	2018	% INCREASE
5K	0.7	0.7	0.8	0.8	0.0%
10K	0.9	1	1.2	1.3	8.3%
Half Marathon	1.5	1.7	1.9	2	5.3%
Marathon	1.5	1.5	1.8	2.1	16.7%
Ultra	1.2	1.3	1.6	1.5	-6.3%
Triathlon	1.7	1.9	2.0	2.1	5.0%

The number of price increases during a race's lifecycle crept up slightly, but remained relatively stable from 2017 to 2018. Shorter events tend to have one, possibly two increases, while longer races generally have two, possibly three increases.

Average Difference Between Min and Max Price

While increased distance (and thus price) naturally leads to a larger gap between the minimum and maximum price, that gap is marginally growing across all distances.

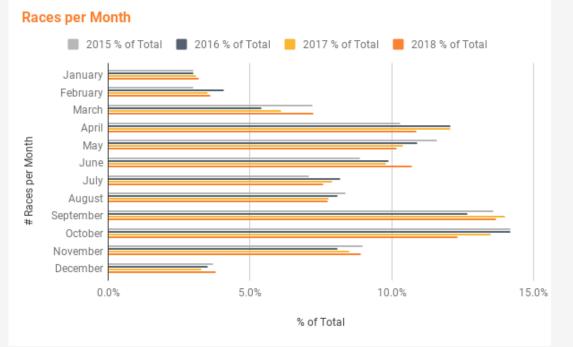| RACE TYPE	2015	2016	2017	2018	% INCREASE
5K	$7.48	$7.99	$8.36	$8.38	0.2%
10K	$8.86	$9.40	$9.78	$10.52	7.6%
Half Marathon	$18.32	$19.97	$23.02	$23.93	4.0%
Marathon	$26.38	$27.41	$29.52	$36.31	23.0%
Ultra	$45.18	$30.42	$32.12	$41.16	28.1%
Triathlon	$25.67	$34.12	$27.52	$30.52	10.9%

takeaways

1

Price increases are only effective if your runners know about them. Coordinate all your marketing efforts to hammer the key dates, making your increases strong time-limited calls to action.

2

Offering multiple price increases is a win-win. A low opening offer makes the race accessible to thriftier runners while locking them in early; a race week price gives procrastinators an option - at a premium price.

3

Use flexible participant management options to drive runners to sign up early. The ability to transfer between events or races - or even to swap bibs - if the need arrises gives participants the confidence to register in advance. Bonus: small fees for transfer options can provide additional revenue to the race.
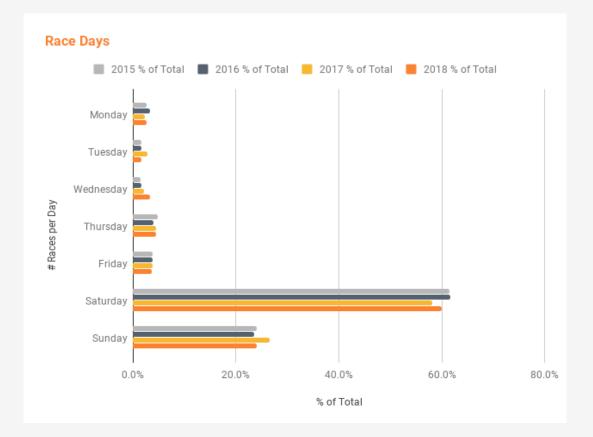
races by month and day 1.4

Races per Month

Legend: ■ 2015 % of Total ■ 2016 % of Total ■ 2017 % of Total ■ 2018 % of Total

As expected, the majority of races hover around the milder spring and fall months. However, as races look to reduce direct competition, there is a minor increase in the percent of races occurring in the less popular summer and winter.

Races per Month

MONTH	2015 % OF TOTAL	2016 % OF TOTAL	2017 % OF TOTAL	2018 % OF TOTAL
January	3.0%	3.2%	3.1%	3.2%
February	3.0%	4.1%	3.5%	3.6%
March	7.2%	5.5%	6.1%	7.2%
April	10.3%	11.9%	12.1%	10.9%
May	11.6%	10.7%	10.4%	10.2%
June	8.9%	9.6%	9.8%	10.7%
July	7.1%	7.9%	7.9%	7.6%
August	8.5%	8.0%	7.8%	7.8%
September	13.6%	12.8%	14.0%	13.7%
October	14.2%	14.1%	13.5%	12.3%
November	9.0%	8.3%	8.5%	8.9%
December	3.7%	3.9%	3.3%	3.8%

Race Days

Races per Day

DAY	2015 % OF TOTAL	2016 % OF TOTAL	2017 % OF TOTAL	2018 % OF TOTAL
Monday	2.7%	3.5%	2.3%	2.7%
Tuesday	1.6%	1.8%	2.8%	1.7%
Wednesday	1.5%	1.8%	2.1%	3.3%
Thursday	4.8%	4.3%	4.5%	4.5%
Friday	3.9%	4.2%	3.8%	3.7%
Saturday	61.5%	59.9%	58.1%	60.0%
Sunday	24.0%	24.5%	26.5%	24.1%

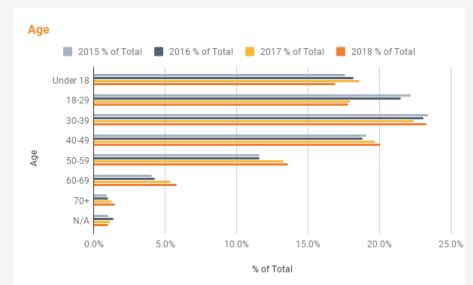Races are consistently held on weekends (84%), with Saturday (60%) more dominant than Sunday (24%).

gender and age trends 1.5

Consistently women have dominated the endurance market over the last four years and continue to (57.2% to 42.1%). However, the percentage of men has been slowly creeping up, gradually moving towards more equal representation of both genders in endurance events.

Gender

GENDER	2015 % OF TOTAL	2016 % OF TOTAL	2017 % OF TOTAL	2018 % OF TOTAL
M	38.4%	39.8%	41.5%	42.1%
F	61.2%	59.6%	57.8%	57.2%
N/A	0.4%	0.5%	0.8%	0.7%

Age

Legend: 2015 % of Total | 2016 % of Total | 2017 % of Total | 2018 % of Total

18-49 year-olds make up the bulk of the marketplace. While those above 50 remain limited, there has been a slight uptick amongst older adults, suggesting a need for a multi-generational approach to RaceDay.

Note: the drop in the 18-29 year-old age range from 2016 to 2017 can likely be attributed to the departure of a major "fun run" series that targets much of their marketing to millennials. 2018 was consistent with 2017 in the 18-29 year-old age range.

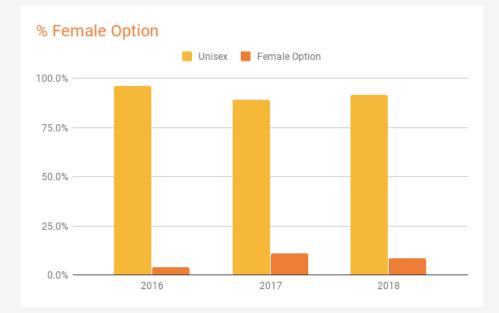| AGE	2015 % OF TOTAL	2016 % OF TOTAL	2017 % OF TOTAL	2018 % OF TOTAL
Under 18	17.6%	18.2%	18.6%	16.9%
18-29	22.2%	21.5%	18.0%	17.8%
30-39	23.4%	23.1%	22.4%	23.3%
40-49	19.1%	18.8%	19.7%	20.1%
50-59	11.6%	11.6%	13.3%	13.6%
60-69	4.1%	4.3%	5.4%	5.8%
70+	0.9%	1.0%	1.3%	1.5%
N/A	1.0%	1.4%	1.2%	1.0%

takeaways

1

Including both women and men in your marketing images, and offering gender-specific sizing makes all runners feel welcome at your event.

2

Increase your participation along the margins with kids runs and awards schemas that recognize older adults for their participation.

3

RaceDay technology matters. Younger runners expect instant results, text notifications, runner tracking, and computerized check in. High tech events appease impatient young runners, excite millennials, and limit lines for runners of all ages.

giveaways 1.6

Most races offer unisex shirts; only 8.5% of 1.7 million race shirts are female size and fit.

% Female Option

Unisex Female Option

For unisex shirts, the size breakdown is:

Unisex Shirt Sizes

Unisex XXL
3.0%

Unisex XL
15.3%

Unisex XS
1.0%

Unisex S
20.5%

Unisex L
27.9%

Unisex M
32.0%

For female shirts, the breakdown is:

Female Shirt Sizes

Female XXL
2.5%

Female XL
10.0%

Female L
21.1%

Female XS
3.7%

Female S
25.9%

Female M
36.6%

---

takeaway

1

Women make up the majority of event registrants (57%), yet are most likely to receive a shirt that won't fit. You're spending money on your giveaway: give people one that fits, and you can earn that money back in the form of free advertising.

race churn 1.7

Over the past year, we have been collecting stats on what happens to races over 500 people that use our platform from year to year. For example, in November, 2018, we looked at the 290 races over 500 participants that used RunSignUp races that occurred in November 2017 to see what happened to them this year.

There are basically three outcomes and stats:

- Renewed races - 90.2%
- No race held - 6%
- Switched to another platform - 3.2%

The meaningful number for the industry is that 6% of races over 500 die. The reality is that the more people, the lower that % is - for example, the number of races over 1,000 that do not recur is less than 3%. However, those larger do still reflect some of the negative pressure that is reported by Running USA in the flat to slight decrease seen in total participants in races.

Internally at RunSignup, we also track races that recur but do not stay on our platform. This allows us to determine if there are emerging competitors or if we are lacking in specific features or support offerings. 3.2% is a relatively low number of races to lose, given that many races change based on the ownership of the timer (this accounts for the top 3 competitors in the list to the left).

takeaways

1

Races are feeling pressure, and some are folding. Larger races tend to be more stable and able to withstand shifts in the market, whereas smaller events - with smaller financial margins - can struggle with the pool of potential participants is squeezed.

2

Race cancellations impact the entire industry by creating a sense of mistrust amongst participants. Be transparent in your communications with your participants to give them confidence that your event is thriving and their money will not be lost to a cancellation.

	Losses Since Nov 2017
	120
EnMotive	9
RaceWire	6
CT/Athlinks	6
ItsYourRace	6
BlackBaud	4
Events.com	3
Shopify	3
Race Roster	3
Haku	3
Lightbox	2
Classy	2
Vertical Runner	2
Red Podium	2
Eastside Racing	1
Eventbrite	1
Active	1
Crowdrise	1
GetMeRegistered	1
Raceplanner	1
Race Entry	1
RacesOnline	1
RaceMenu	1
Athlete Guild	1
Race Forum	1
LocalRaces	1
Other	1

promotion

1 KEY FINDINGS AND TRENDS

- While coupon usage has plateaued, their effectiveness is still rising with the average **ROI on coupons increasing from 340% in 2017 to 369% in 2018**.

- Referral programs with refund and or swag rewards are inexpensive ways to increase participation, with an average of **13 participants referred to your event for every refund given.**

- When races have groups or teams, **on average 28.9% of runners join a group,** and the average size of each group is rising**.**

- For races that turned them on, **automated emails led to 14% of registrations in 2018,** with 12% resulting from price increase emails and another 2% coming from incomplete registration emails**.**

2 CONCLUSIONS

- Participants react to the strong call to action of a coupon, even when the actual amount of the discount is limited.

- Referral rewards continue to be one of the most effective methods of promotion.

- Social connection is a driving force in the industry, and offering groups is a free way to promote running as a social activity.

- Email marketing works - and can be time-efficient with automated emails.

3 RECOMMENDATIONS

- Coupons are key to any marketing strategy - but you don't have to undervalue your event to offer them. Small discounts can be big registration boosts.

- Implement Referral Rewards AND SWAG Rewards for an immediate (and cost-effective!) impact on registrations.

- Add groups and teams to your next event, and encourage members to bring more friends with incentives based on team size.

- Turn on automated emails to ensure that you're maximizing the value of your price increases - instantly.

2.1 coupons

Coupon usage slightly decreased from 7.8% of registrations in 2017 to 7.5% of registrations in 2018. The average discount also decreased from $15.69 in 2017 to $10.92 in 2018. But the payback was excellent and improving - the ROI of coupons increased from 340% to 369%.
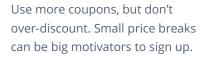
COUPONS	% OF REGISTRATIONS USING COUPONS	ROI	AVERAGE DISCOUNT	TOTAL DISCOUNTS	REVENUE FROM COUPONS
2015	3.7%	262.20%	$13.03	$2,137,204	$5,604,445
2016	4%	310%	$12.04	$2,907,418	$9,012,947
2017	7.8%	340%	$15.69	$3,684,319	$12,526,890
2018	7.5%	369.0%	$10.92	$3,559,383	$13,132,704

Our numbers exclude about 150,000 100% off coupons. These are typically used for used for Groupon/Living Social style promotions, as well as for sponsor and elite free entries.

Coupons

takeaways

1

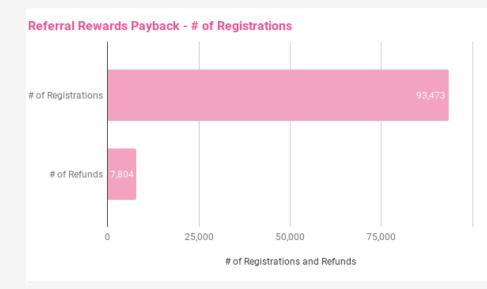Use more coupons, but don't over-discount. Small price breaks can be big motivators to sign up.

2

Combine referral rewards and coupons by adding a time-limited coupon that a referrer can share to entice their friends to register.

referrals 2.2

Referrals are a key tool for driving registrations. RunSignup introduced Referral Rewards in February, 2016, where a race can initiate a refund if a participant gets additional people to sign up for the race via a unique referral link.
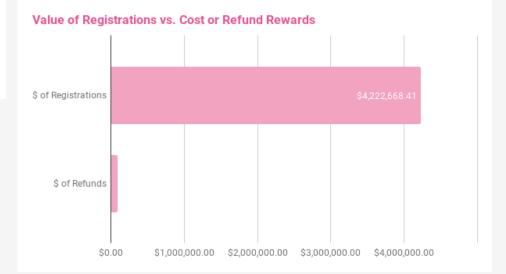
This is probably THE MOST EFFECTIVE promotion you can run to increase participation in your race.

Approximately 6% of registrations come from referrals (that pays for the processing fee!). And the financial returns are even more impressive with CPA (Cost per Acquisition) of typically less than $1, and ROAS (Return on Ad Spend) typically 1,000%+:

Referral Rewards Payback - # of Registrations

Referrals represent 13 new participants for each refund, measured across all races with Referral Rewards programs.

That is a ROAS of over 4,700%. It's rare to get over 200% on Facebook ads!

Value of Registrations vs. Cost or Refund Rewards

Some races implement aggressive Referral Rewards - for example, referring 5 registrations to receive a refund equal to the entire cost of the original registration. This can be particularly beneficial because a participant with fewer than 5 referrals will be of no cost to the race, while still driving 1 to 4 friends to register. These programs can get 10-18% rates of adoption with CPA of around $1.00 and ROI of 3,000%+.

2018	
No. Referral Codes	219,432
No. Race Page Views	4,227,62
No. Sign Up Page Views	243,865
No. Completed Registration Transactions	73,235
No. Completed Registrations	93,473
Completed Registration Amounts	$4,222,668.41
No. Referral Refunds	7,804
No. Physical Referral Refunds	6,875
(Multiple refunds on a single day are merged into one physical refund)	
Estimated Referral Refund Amounts	$87,047.72
Estimated ROI	$4,135,620.69 (4,751%)
Estimated CPA	$0.93

takeaways

1

Implement Referral Rewards for an immediate impact on registrations. There is no more trustworthy advocate for your event then the friend of a potential participant!
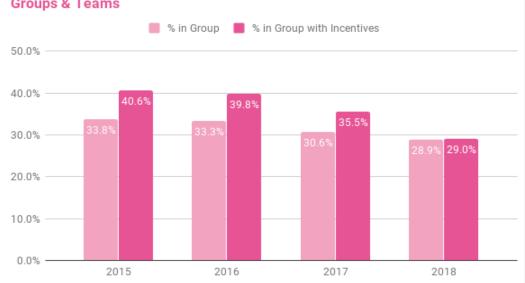
2

Set a high referral number, - three to five referrals - with a high potential refund such as the full cost of registration. This provides real motivation to refer, while ensuring that many participants will make referrals without reaching the threshold for a refund.

groups & teams 2.3

Viral marketing - race promotion by your participants, to potential participants - is the cheapest and most effective way to reach more runners. Groups and teams are central to the philosophy of viral marketing, encouraging athletes to include their family and friends in their event. Bonus: a more social, shared RaceDay experience is also more memorabe - making participants on teams more likely to return to your event.

Of the races that had teams, we saw over 28.9% of participants signup with a team rather than as an individual, with an average group size of 6.39%.

Incentives based on group size can spark competitiveness amongst groups and encourage more aggressive recruiting. Note: our numbers for group incentives can only reflect those with refund incentives, but many races provide tangible incentives such as private porta potties or a tent.

Groups & Teams

■ % in Group   ■ % in Group with Incentives

Year	% in Group	% in Group with Incentives
2015	33.8%	40.6%
2016	33.3%	39.8%
2017	30.6%	35.5%
2018	28.9%	29.0%

> **"** *If you want to be on a team, once you hit that 5-member mark, the original four members will get their $5 discount, and then anybody else that registers receives that $5 discount. That's a huge hit, and the way the system handles it is beautiful. I don't have to do anything - you set it up once, and it works. For that race...it's been highly successful because it encourages people to bring their friend, bring their family. We have people that sign up ten people just because they want them on their team.* **"**

GROUPS & TEAMS	% IN GROUP	% IN GROUP WITH INCENTIVES	AVERAGE SIZE	AVERAGE SIZE WITH INCENTIVES
2015	33.8%	40.6%	5.3	6.5
2016	33.3%	39.8%	5.5	6.6
2017	30.60%	35.50%	6	7.1
2018	28.9%	29.0%	6.39	7.7

takeaways

1

Teams don't have to be competitive to count. Maximize their value by encouraging team activity (team shirts, team photo area, team finisher awards) on RaceDay to create the best overall experience.

2

Eliminate the labor of managing teams by allowing participants to create and manage their teams on their own.

3

Increase the size of your teams with incentives based on team size. Incentives can be as simple as automatic refunds, or they can be creative VIP experiences or swag given on RaceDay.

RaceInsights 2.4

RaceInsights, powered by RunSignup Analytics, tracks every click, registration, and transaction on each race's website and analyzes the sources to show race directors the true ROI of marketing efforts such as Facebook advertising and automated emails. Our aggregate data shows that the largest source of registrations is people going directly to a race's website, whether that is PhiladelphiaMarathon.com or RunSignup.com/ScottCoffeeRun.

Our data likely underreports Google and Facebook as web referral sources since many races use these sources to drive traffic to their independent race websites (i.e. PhiladelphiaMarathon.com). However, races that use RunSignUp's race website as their primary or only website would be counted.

Source	2017	2018
Google	19.1%	16.8%
Email	6.5%	6.1%
Facebook	5.5%	4.8%
RunSignup Affiliates	2.9%	3.1%
Bing	1.3%	0.2%
Yahoo	0.3%	0.2%

Points of Clarification:

Since not all races use RunSignup's free email marketing system, the email category is likely under-reported across all events.

For example, Google "Scott Coffee Run". The first search result will direct you to the race website on RunSignup; this referral source would attribute the click on runsignup.com/ScottCoffeeRun to Google.

> *Being able to use RaceInsights within RunSignup to see where our ad dollars are being spent properly helps us create better performing campaigns - the stuff I'm looking for when I'm marketing.*
>
> Erik Young, Sour Fish Events

3.1% of registrations are driven by either RunSignup's own race search page, or by one of the 100+ affiliate websites that share publish race calendars with our events. Affiliates either integrated directly without API feed of new races, or use an automated calendar widget on their website.

RunningintheUSA.com and HalfMarathons.net are two of the largest RunSignup affiliates that use the API to include all RunSignup races, while running stores and clubs often use the race calendar widget.

takeaways

1
Use a free RunSignup race website for built-in SEO that makes it easy for people to find your event on Google.

2
Facebook leads to only 4.8% of registrations, but money matters. Events that prioritize it can see as much as 70%.

3
Include strong calls to action in your emails. Your metric of success is not opens, it is driving traffic (and registrations) to your site.

4
List your race in as many local race and running club calendars as possible.
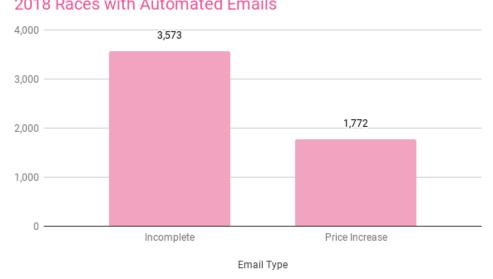
email marketing 2.5

Our RaceInsights data improves our understanding of of what marketing tools drive the most registrations for the least marketing spend. As covered above, the free RunSignup Email Marketing system accounted for 6.1% of registrations as a direct referral source. This captures people that clicked on an email link to the race's website or registration path and signed up.

The second set of data is a drill-down look at the effectiveness of two automated emails that the RunSignup email marketing system sends - Price Increases and Incomplete Registrations.
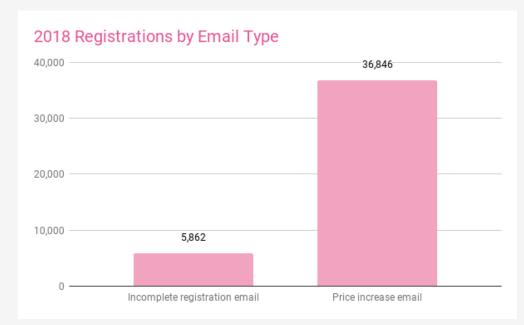
Automated emails are free and require no effort from the race director. In 2018, 36,846 registrations (12%) came from the price increase email and

5,862 (2%) from the incomplete registration email.

There is a lot of room for races to take advantage of automated emails as a tool - in 2018, 3,573 races turned on Incomplete registration emails, and 1,772 activated the price increase email.

2018 Races with Automated Emails

2018 Registrations by Email Type

Incomplete registration email	5,862
Price increase email	36,846

takeaways

1

Make emails actionable. Always include a specific, time-limited call to action - a price change, an expiring coupon, or swag that requires early registration.

2

Turn on automated emails for price increases! While many races may send price increase emails manually, customizing the automatic email reduces labor and eliminates human error (forgetfulness).

3

Turn on incomplete registration emails. People who start - but do not finish - registering demonstrate a high level of interest and sometimes simply need a reminder to convince them to sign up.

registration

1 **KEY FINDINGS AND TRENDS**

- Nearly **24% of race registrations took place during race week,** a slight decrease from 26.6% in 2017.

- **Over a quarter (27.1%) of all registrations take place within the 3 day period prior to a price increase** or registration closing date.

- **Mobile devices account for 66% of race website traffic,** but 56% of transactions still occur via desktop.

2 **CONCLUSIONS**

- Runners are increasingly signing up on race day and the days leading up to the event, rather than weeks or months in advance.

- Runners procrastinate. Race week (and RaceDay) registration is key to maximizing participation.

- Mobile devices continue to dominate for race website views, and while more people still register on a desktop device, the gap between mobile and desktop transactions is narrowing.

3 **RECOMMENDATIONS**

- Fast online registration and on-site registration kiosks can help streamline RaceDay, allowing you to accommodate procrastinators without lengthy lines and excessive data entry.

- Build your marketing campaigns - both social media and email marketing - around your registration and pricing schedule.

- Ensure the mobile responsiveness of both your race website and your registration path. RunSignup's free websites are automatically configured for mobile devices.

registration days 3.1

In 2018, there was a slight decrease in the number of people signing up during race week; however, the trend continues to indicate that over 25% of participants wait until the last week. To accommodate this, most races keep registration open through the gun time of their race.

Early registration (more than 90 days out) also rebounded back close to it's pre-2017 levels. We saw some skewing of early registration numbers in 2017 with the loss of a large fun run series that marketed aggressively early, but early registration has settled out at nearly 15% of participants.
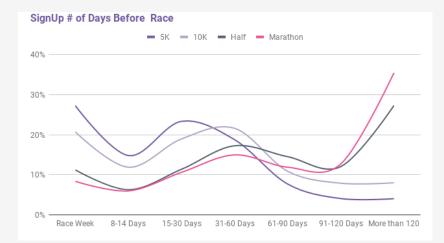
When do Runners SignUp?

WHEN DO RUNNERS SIGNUP?	2015	2016	2017	2018
Race Week	23.6%	21.5%	26.6%	23.8%
8-14 Days	13.2%	11.7%	14.5%	12.9%
15-30 Days	20.5%	18.2%	22.7%	20.6%
30-60 Days	19.3%	17.6%	19.9%	18.8%
60-90 Days	9.3%	10.0%	9.7%	9.1%
More than 90 Days	14.1%	21.1%	6.6%	14.7%

There are differences by event. Shorter distances see fewer early registrations than long distances with their longer training cycles and travel distances. On the flip side, race week accounts for 27% of 5K registrations, but just 8% of marathons).

SignUp # of Days Before Race

	5K	10K	HALF	MARATHON
Race Week	27%	21%	11%	8%
8-14 Days	15%	12%	6%	6%
15-30 Days	23%	19%	11%	11%
30-60 Days	19%	22%	17%	15%
60-90 Days	8%	11%	15%	12%
90-120 Days	4%	8%	12%	13%
More than 120	4%	8%	27%	35%

takeaways

1

Long races have a long training cycle - open your event early to allow participants to prepare. Have a short race? Opening early can set your race apart from other 5K's that kick off late.

2

Never close registration! The RaceDay Suite Technology Suite makes race day registration easy! Cut labor and save time with online registration, kiosk and mobile registration, and real-time syncing with timer software.

3

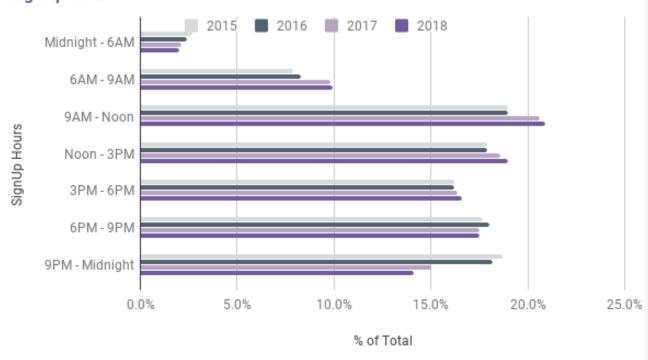Skip the "off" season. Promote your race year-round to capture the widest audience.

4

Longer, more expensive races often have as many as 5 price increases. Regardless of your race distance, pricing is a powerful tool for motivating athletes to act (and register).

registration times 3.2

Registration is a 24-hour affair, with computer (and mobile) access readily available. However, there is an expected drop between midnight and 6:00am, and slow movement between 6:00am and 9:00am.

SignUp Hours

SIGNUP HOURS	2015	2016	2017	2018
Midnight - 6AM	2.7%	2.4%	2.1%	2.0%
6AM - 9AM	7.9%	8.3%	9.8%	9.9%
9AM - Noon	19.0%	19.0%	20.6%	20.9%
Noon - 3PM	17.9%	17.9%	18.6%	19.0%
3PM - 6PM	16.2%	16.2%	16.4%	16.6%
6PM - 9PM	17.7%	18.0%	17.5%	17.5%
9PM - Midnight	18.7%	18.2%	15.0%	14.1%

takeaways

1

There's no bad time to run a promotion (except the middle of the night). Don't overthink time of day - people are online all day!
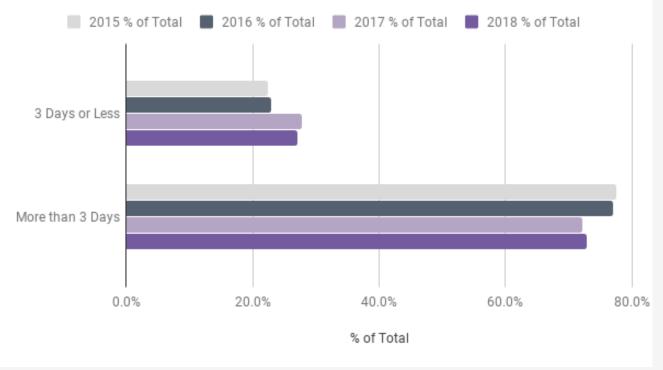
2

Activity spikes ar lunchtime, and again after dinner. Hit people while they are looking for a distraction.

pricing strategies 3.3

Over a quarter (27.1%) of all registrations take place within the 3 day period prior to a price increase or registration closing date. This highlights the need for strong, time-based incentives to motivate runners to register.

% of SignUps 3 Days Prior to Price Increases or Registration Close

Legend: 2015 % of Total · 2016 % of Total · 2017 % of Total · 2018 % of Total

% of Total

% OF SIGNUPS 3 DAYS PRIOR TO PRICE INCREASE/REGISTRATION CLOSE	2015 % OF TOTAL	2016 % OF TOTAL	2017 % OF TOTAL	2018 % OF TOTAL
3 Days or Less	22.5%	23.0%	27.8%	27.1%
More than 3 Days	77.5%	77.0%	72.2%	72.9%

takeaways

1

Price increases are powerful. Maximize their impact by sending emails to past participants who have not registered, as well as to current registrants (to encourage them to invite their friends) and using social media to make runners aware of the countdown on your current price.
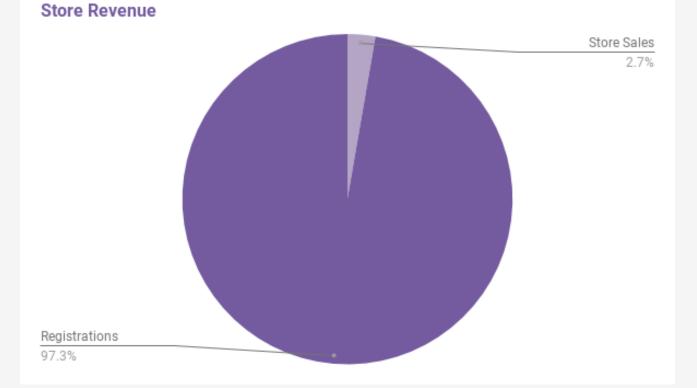
2

Coupons can be great engines to drive registration, but time limits make them much more effective. Include deadlines!

race store & add-ons 3.4

Many races include merchandise for sale, via add-on and store items. Add-ons are merchandise for sale to participants during (but not outside) the registration path. A race store has merchandise for sale to participants and the general public both during and outside the registration path.

Of the 2,453 races that had an online store in 2018, the percentage of total sales value derived from store sales slightly declined to 2.8% in 2018, down from 2.9% in 2017.

Store Revenue

Store Sales
2.7%

Registrations
97.3%

RunSignup

STORE SALES	2015	2016	2017	2018
# of Races			2,453	2,660
Store Sales	$1,932,837	$4,209,643	$2,101,020	$2,553,027
Registrations	$41,953,509	$74,680,457	$72,543,404	$91,187,688
% Store Sales	4.6%	5.6%	2.9%	2.8%

takeaways

1

Stores provide an opportunity to expand your brand beyond just a t-shirt. Offer unique apparel and novelty items with a clear tie-in to your event for an added revenue source. Bonus: non-participants can access the store to purchase items and support your cause (even if they can't be there).

2

Include an add-on for flexible purchase options. Enabling participant management will allow participants to purchase an add-on with the peace of mind that they can edit the size or color later.
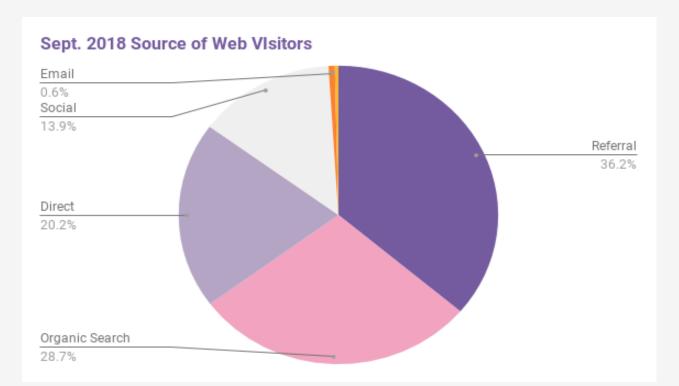
web analytics 3.5

The data in this section looks at Google Analytics data for September of each year 2015-2018 to create an overview of how participants find race websites (and what devices they use).

This shows the volume of traffic and $ of transactions

processed as reported to Google Anayltics. Google does not capture all sessions and traffic, rather, the data is reported on the volume below.

	SEPT 2015	SEPT 2016	SEPT 2017	SEPT 2018
Sessions	1,782,000	2,866,000	3,421,377	4,636,812
& Transactions	$ 8.7M	$ 12.8M	$13,253,653	$17,848,933

The following charts show the source of those visits.

Sept. 2018 Source of Web Visitors

Email 0.6%
Social 13.9%
Referral 36.2%
Direct 20.2%
Organic Search 28.7%

Referrals, representing either race calendars like RunningintheUSA.com or websites for races, timers, or race series (like VTMTS.com or philadelphiamarathon.com), are the primary source of web traffic at 35.8%.. Direct traffic, or runners who came directly to the race webpage or to the RunSignup.com homepage, make up an even 20% of traffic..

The growth from 2017 to 2018 is in organic search. Search is still larger than Social, which might be somewhat explained by the high ranking of RunSignup Race Websites in Google. With 42% of visitors coming from organic search and social interactions, they remain strong sources for attracting visitors.

Note the low rates for email; this is likely due to incorrect source tracking in Google Analytics and different email clients - for example a link on an email in a mobile phone pops the browser with a direct link. The 6.1% reported by RaceInsights is more accurate, but even with that there are a number of links that from the email to a race's private domain website that we can not track.

SOURCE	SEPT. 2015	SEPT. 2016	SEPT. 2017	SEPT. 2018
Referral	53%	47%	42.3%	35.8%
Organic Search	18%	21%	24.4%	28.3%
Direct	15%	16%	17.6%	20.0%
Social	12%	15%	14.6%	13.8%
Email	0.4%	0.2%	0.5%	0.6%
Paid Search	0.1%	0.1%	0.1%	0.4%

"
We tell all the races that we work with not to worry about having a professional build their website, or even to put it on their organization (school or church) website. We tell them just to focus on using RunSignup.

- Brad McCleary, Bodies Race Company
"

Social Value

Google Analytics tracks social interactions. These are 93% on Facebook with a small share from Twitter and Instagram.

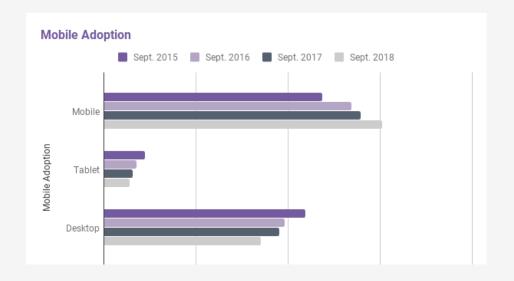| SOCIAL VALUE	SEPT. 2015	SEPT. 2016	SEPT. 2017	SEPT. 2018
Contributed Social Conversions	6.2%	7.5%	9.0%	8.9%
Last Interaction Social Conversions	3.9%	4.1%	4.5%	4.6%

takeaways

1

If you aren't using a RunSignup website that has been optimized for Google, engage an expert to improve your SEO (Search Engine Optimization) and ensure that runners can find your site.
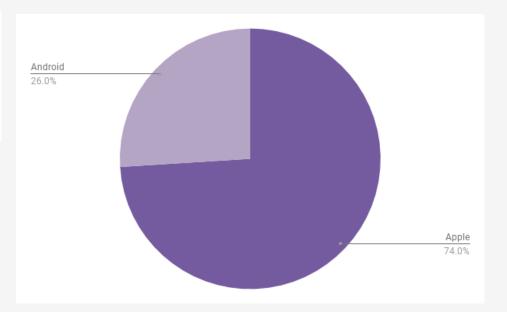
2

Runners are more likely to register for an event when they are referred by a source they trust. RunSignup automatically shares race calendar information with many affiliates, but check with your local running experts (stores, clubs, etc.,) to make sure you're on as many lists as possible!

mobile adoption 3.6

It's a mobile world, and the data indicates that mobile internet usage isn't going anywhere. Mobile devices continued to dominate as the device type most used to view RunSignup races, increasing from 56% in 2017 to 61% in 2018. Views on both tablets and desktops continue to fall during the same time period.

Mobile Adoption

Apple remained at a dominant 74% market share in 2018 among visitors to RunSignup Race Websites:

MOBILE ADOPTION	SEPT. 2015	SEPT. 2016	SEPT. 2017	SEPT. 2018
Mobile	47.4%	53.8%	55.8%	60.5%
Tablet	8.9%	7.0%	6.2%	5.5%
Desktop	43.7%	39.2%	38.0%	34%
Apple	70%	70%	74%	74%
Android	28%	28%	26%	26%

+60.5%
TRAFFIC IS FROM MOBILE

While the traffic is now 66% mobile and tablet, the conversions on those devices is somewhat lower. However, it is interesting to note that the number of transactions completed on mobile is rising faster than the number of mobile users clicking on race websites. The improvement in conversion is due to both the increasing willingness of runners to signup on their mobile devices and the

Completed Transactions on Mobile vs. Desktop

	Sept. 2015	Sept. 2016	Sept. 2017	Sept. 2018
Mobile	25.6%	30.7%	33.5%	38.1%
Tablet	8.5%	7.0%	6.5%	6.1%
Desktop	66.9%	62.2%	60.0%	55.8%

takeaways

1

Test your technology. Always review your website and registration path on a mobile device - both Apple and Android, if possible.

2

Transactions on mobile devices are steadily increasing. Make your registration path as simple (and short) as possible to capture potential participants while they are on their mobile devices.

donations & fundraising

1 **KEY FINDINGS AND TRENDS**

- The majority of donors make relatively small donations, with 71.4% of donors contributing $25 or less. However, we found that **19.3% of all donation money collected was from the 1.08% of donors who contributed more than $250.**

- A checkbox donation option during registration encourages giving. **Races raised $1,903 on average from checkbox donations,** as compared to $581 raised by events with traditional open-ended donations (without fundraisers).

- Races that engage fundraisers are significantly more successful, with **fundraising-enabled races raising on average $4,745.**

2 **CONCLUSIONS**

- A successful donation campaign casts a wide net, asking for big dollar donations while continuing to encourage even minor donations.

- Simple donations - like a checkbox - capture fundraising dollars even from those with the shortest attention span and those on small mobile devices.

- Peer to peer fundraising is optimal for raising the most money. Take advantage of a highly engaged community.
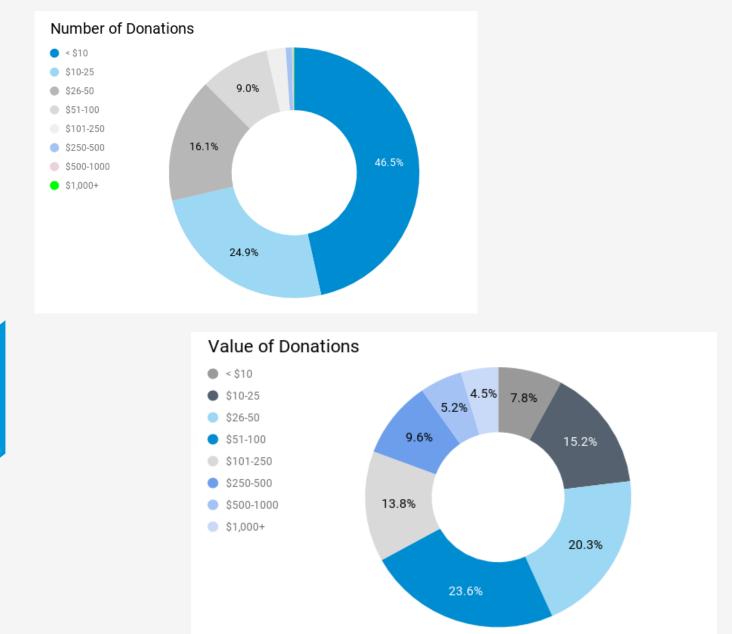
3 **RECOMMENDATIONS**

- Setup donation levels for a variety of donors - from small dollars ($10) to pie-in-the-sky options like $1000. Include creative names and descriptions for your levels to bring the value of donations to life.

- Include a checkbox donation option to give registrants a low-effort way to contribute.

- Engage the most loyal supporters of your cause including them as fundraisers for the event. Offer fundraising rewards and share fundraising success stories to keep fundraisers active and motivated.

4.1 number and value of donations

The figure below shows the average number and value of donations in 2018. The wide range of donation amounts is instructive: it's important to engage donors of all levels. While a donation less than $10 may not seem like much, these donations aggregated to $1,214,145 in 2018 (7.8% of all donations collected). On the flip side, while only 1.08% of people donated more than $250, those donation levels still account for 19.3% of all donation dollars collected on the site.

Number of Donations

- < $10
- $10-25
- $26-50
- $51-100
- $101-250
- $250-500
- $500-1000
- $1,000+

9.0%
16.1%
46.5%
24.9%

Value of Donations

- < $10
- $10-25
- $26-50
- $51-100
- $101-250
- $250-500
- $500-1000
- $1,000+

4.5%
7.8%
5.2%
15.2%
9.6%
13.8%
20.3%
23.6%

DONATION AMOUNT	NUMBER OF DONATIONS	VALUE OF DONATIONS
< $10	197,790	$1,214,145
$10-25	105,783	$2,357,254
$26-50	68,333	$3,151,942
$51-100	38,046	$3,664,06
$101-250	10,559	$2,135,0501
$250-500	3,400	$1,488,881
$500-1000	879	$799,091
$1,000+	299	$702,499

takeaways

1

Create donation levels that reflect the type of impact they will make for your nonprofit - and include a wide range of donation amounts.

2

Include a low-dollar donation option ($10) to allow even your cash-strapped participants feel like they are making a difference.

3

Suggest a high donation level (over $500). If you don't ask, you'll never get it - and your participants won't know how big of an impact they can make!

4.2 donations vs. fundraising

RunSignup fundraising has three distinct options - a basic donate checkbox on the checkout page (with a set donation amount), simple donations (with or without donation levels) during registration, and fundraising (where participants raise money from their full network). Across 12,254 races that had one of those options available, the results show that races with fundraisers raise significantly more money.

	AVERAGE TOTAL	NUMBER OF RACES	NUMBER OF DONATIONS PER RACE	% OF ALL TRANSACTIONS (INCLUDING REGISTRATIONS)
Donations Only	$581	9,537	24	3.8%
Donations & Fundraisers	$4,745	2,068	91	6.6%
Checkout Page Only	$1,903	649	102	0.8%

takeaways

1

If you have an engaged community, turn on fundraising to enable them to help you (more).

2

Incentives - whether monetary (a reduced registration fee or a refund for reaching a fundraising threshold) or simply motivational (like fundraising goal tracking or a milestone badge) can motivate your fundraisers to reach higher.

3

Even if you have more complex donations turned on, a checkbox donation option can capture participants who support your cause - but raced past the donations module.

RaceDay

1 KEY FINDINGS AND TRENDS

- In 2018, **44% of RaceDay registrations came through the RaceDay SignUp app**.

- Of the races that sent notifications, **72% of them sent fewer than 500 TXT notifications.**

- Usage of the RaceJoy GPS tracking app **grew 18% from 2017 to 2018**, with 86,005 participants and 93,513 spectators utilizing the technology in 2018.

2 CONCLUSIONS

- Modern technology maximizes participation by allowing for RaceDay registration - without lengthy lines or scrambling to input paper registrations.

- Mid-sized (and even small) races are implementing high tech features to enhance their RaceDay experience.

- Spectators are looking for a way to engage on RaceDay, tracking options create a better race experience for participants and spectators alike.

3 RECOMMENDATIONS

- Take your RaceDay Signup App to the next level with a RunSignup credit card swiper to eliminate cash and add a level of security for participants paying by card.

- RaceDay technology is increasingly expected by your runners. Set your race apart with instant finisher data, notifications, and even video results.

- Get RaceDay Certified and earn the ability to offer all your RunSignup races RaceJoy, for free...or, for a fee (for you)!

signup app usage 5.1

As noted in section 3.1, runners are looking for RaceDay registration. In addition to old-school paper registrations, some races leave their regular online registration open through RaceDay. The number of RaceDay registrations that came through the SignUp App increased 11% in 2018 (44%) from 2017 (40%). The percent of registrations on the SignUp App that took advantage of the card swiper increased from 13% to 13.8%.

Here are the totals for RaceDay Registrations:

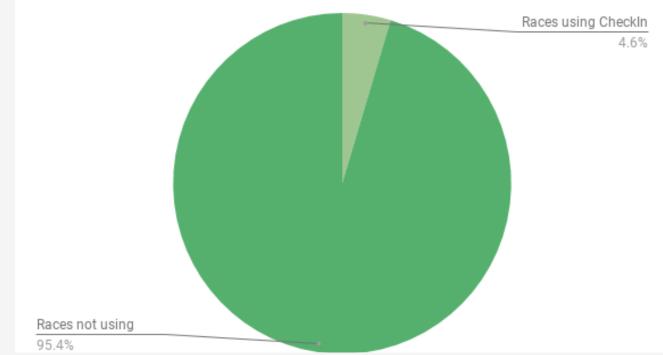|	2017	2018
Total RaceDay Registrations	85,064	84,986
Number of App SignUps	33,613	37,334
Number Using Card Swiper	4,360	5,162
% App SignUps	39.5%	43.9%

takeaways

1

We all know it would be more convenient if runners would register week in advance - but they won't. Rather than miss out on potential revenue, upgrade to modern technology and enable registration until race kicks off.

2

Invest in card swipe technology to accommodate cash-less participants - securely and reliably.

5.2 checkin app usage

RaceDay CheckIn "technology" can range from pen and paper to a multi-location, online-offline CheckIn solution. This year, only 4.6% of races took advantage of the the RaceDay CheckIn App, but those 1,429 races checked in 11% of all registered runners. This suggests that larger races are more likely to take advantage of the App.
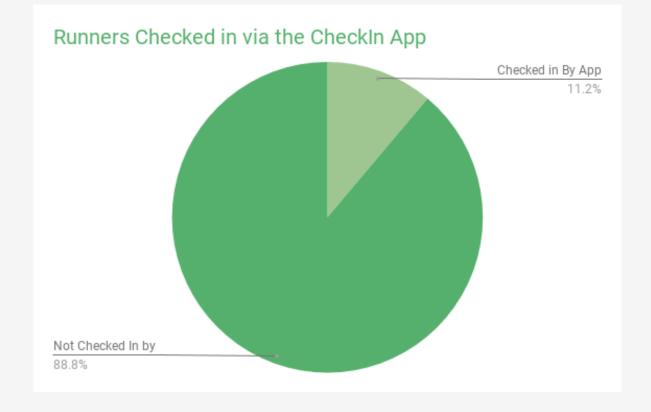
Races that Checked Runners in via the CheckIn App

Races using CheckIn
4.6%

Races not using
95.4%

> "I think part of what allows us to [grow] is the ability of RunSignup to bring in more runners - where the industry seems to be flat, we are actually growing, and I think a part of that is that we can provide these extra services for a fraction of the price."
>
> Troy Rebert, Knoxville Track Club

Runners Checked in via the CheckIn App

Checked in By App
11.2%

Not Checked In by
88.8%

takeaways

1

For a faster, better tracked CheckIn experience, copy the big guys and train your volunteers to use the RaceDay CheckIn App.
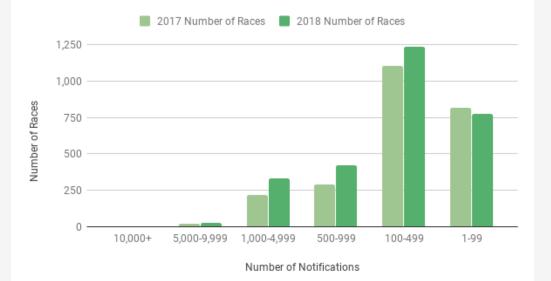
5.3 TXT results notifications

Once upon a time, racers got their results in the local newspaper the next day. Today, runners are accustomed to instant results, at their fingertips. In 2018, we saw 2,805 races use our TXT results notifications, sending a total of 1,523,729

results notifications. While there are other methods of sending notifications and the true number of races using notifications is likely higher, it is interesting that only 6.4% of races on RunSignup took advantage of free TXT notifications in 2018.

72% of races that sent notifications sent fewer than 500, indicating that small to medium races are getting in on the technology game.

Here is a breakdown of the number of the number of races sending a range of notifications.

Number of Races vs. Number of Notifications

Legend: ■ 2017 Number of Races ■ 2018 Number of Races

X-axis (Number of Notifications): 10,000+ | 5,000-9,999 | 1,000-4,999 | 500-999 | 100-499 | 1-99
Y-axis (Number of Races): 0, 250, 500, 750, 1,000, 1,250

takeaways

1

Races of all sizes are getting into the RaceDay technology game. Large events are expected to have cutting edge technology, but small and medium events can set themselves apart by mirroring the big dogs.
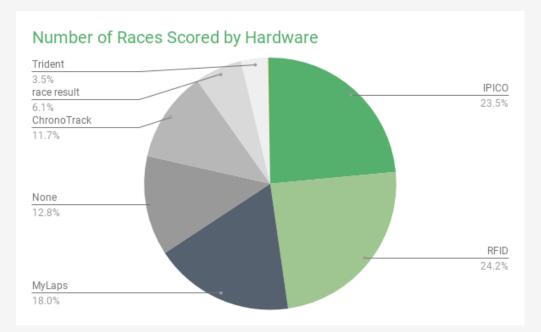
2

Don't limit your RaceDay technology to TXT notifications. Consider a live leaderboard on-site or RaceJoy's GPS tracking notifications.

5.4 The Race Director

The Race Director is one of the most popular scoring software packages that timers use, with hundreds of timers using it to score over 15,000 races and 5 million registrations. Since The Race Director is used more with some timing systems than others (for example a lot of IPICO, RFID and MYLaps timers use The Race Director, while relatively few Chronotrack timers use The Race Director and use either RunScore or CTLive), the results are a bit skewed, but are still interesting. Also of note: all of our registration data is based on US customers; approximately 3% of the users of The Race Director are international.

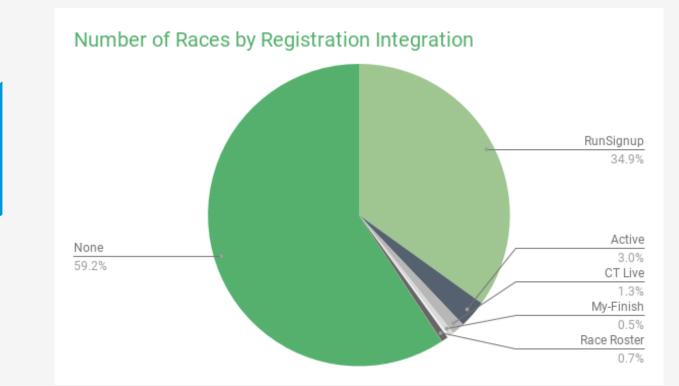| THE RACE DIRECTOR 2017 DATA	
Total Races	20,378
Total Participants	8,715,238
Average Race Size	428

We also took a look at the percentages of races and participants scored by The Race Director using each hardware system.

Number of Races Scored by Hardware

Trident 3.5%
race result 6.1%
ChronoTrack 11.7%
None 12.8%
MyLaps 18.0%
IPICO 23.5%
RFID 24.2%

The full data on Chip Timing Systems:

SYSTEM	# RACES	# PARTICIPANTS
IPICO	3,620	1,013,113
RFID	3,732	1,240,467
MyLaps	2,774	1,085,750
None	1,971	408,048
ChronoTrack	1,796	816,069
race result	935	291,038
Trident	536	125,989
IPICO TUHF	10	4,474
AMB	13	969
Winning Time	8	2,292
J-Chip	6	7,916
DAG	2	205
Trident UHF	2	9

Finally, we evaluated the number of races using the Race Director and importing participant data from a registration system. Note: this only takes into account the number of races that linked their registration with The Race Director via an integration for importing participant data or exporting to results, not the total number of races hosting registration on each site (hence the large number of "none").

Number of Races by Registration Integration

RunSignup
34.9%

None
59.2%

Active
3.0%

CT Live
1.3%

My-Finish
0.5%

Race Roster
0.7%

The full data on Registration Integrations:

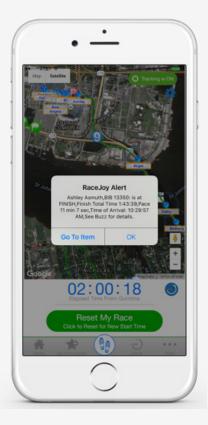| REGISTRATION	# RACES	# PARTICIPANTS
RunSignup	5,005	1,557,238
Active	428	192,603
CT Live	193	71,239
My-Finish	78	71,163
The Driven	34	10,488
Race Roster	100	100,000
XACT	5	6,721
SignMeUp	1	541
IM Athlete	0	0
None	8,492	2,723,436

takeaways

1

The Race Director, and the next generation RaceDay Scoring products are open platforms, working with a variety of hardware options and registration systems. You don't need to pick a complete package - instead, use open solutions that allow you to select the best technology for each component of your event.

RaceJoy GPS Tracking 5.5

RaceJoy is a mobile app that allows runners to be tracked by friends and family throughout a race course via real-time GPS tracking. Usage of the app increased 18% from 2017 to 2018, with an average of 911 users for every race that activated the app.

The overall usage of RaceJoy between 2017 and 2018 was limited due to the new minimum price for RaceJoy. There are 4.8% fewer races in 2018; however, the participants' usage increased 18%. This means participants adoption of the technology continues to increase. In addition, there was a 34% increase in cheers showing that spectators really like to support and engage with participants.

2017 RACEJOY USAGE	2017	2018
Races	207	197
Tracked Participants	73,040	86,005
Spectators	118,692	93,513
Progress Alerts	2,312,161	2,904,057
Cheers Sent	283,598	381,245

The largest single race usage of the app in 2018 was the Philadelphia Marathon, with 6,336 Participants and 16,651 Spectators. There are not any Facebook GPS Alerts for 2018 because Facebook disabled this capability in 2018. Results from that race give an indication of the adoption of RaceDay technology when it is available.

RACEJOY USAGE: PHILADELPHIA MARATHON	2018
Total Users	22,987
Participants	6,336
Spectators	16,651
# of Phones Tracked	5,390
# of times main RaceJoy race page accessed	278,635
# of GPS Progress Alerts Issued	371,536
# of Cheers	41,322
# of GPS Alerts to Facebook	0
# of GPS Alerts to Twitter	1,185

takeaways

1

The RaceDay experience is about more than just the racers. Spectators may not be paying, but their interactions can be crucial to the paying customers - and accurate tracking can make both participants and spectators happy.

2

Promote the technology you offer. You can't impress your runners if they don't know about your cutting edge offers!

Run Signup

RaceTrends

ANNUAL STATISTICAL REPORT

15/18