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RaceTrends

Annual Statistical Report

15/17



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 RunSignUp

Abraham

running  usa



RaceTrends

Annual Statistical Report

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intro and methodology

Millions of people participate in endurance events each year. Over the last several years, a number of voices in the running community have talked about the running bubble and the decline in the number of endurance event finishers. But for event directors, real data about the state of industry to corroborate these statements remains elusive.

RunSignUp collaborated with RunningUSA and Peter Abraham to produce Race Trends: 2017 Annual Statistical Report. We mined RunSignUp's registration data from the past three 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 Promotion impacts
- Registration patterns
- Fundraising and donation campaigns
- 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 the RunningUSA conference, 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
Overall	21,150	31,357	37,472	3,560,588	4,983,970	5,060,076
5K and less	12,382	17,766	21,132	1,930,06	2,797,52	3,158,12
10K and less	1,957	3,187	3,324	352,227	540,756	644,334
Half Marathon and less	997	1,438	1,894	334,483	533,129	549,626
Marathon and less	424	655	77	66,547	123,366	121,760
Ultra	310	497	647	32,484	50,837	55,275
Triathlon	464	711	1,009	34,166	64,048	85,604
Unknown	4,616	7,103	8,692	810,620	874,313	445,356

A large next generation “fun run” race series that accounted for over 800,000 registrations in 2016 did not use RunSignUp in 2017 due to legal problems with Active. We replaced those fun run participants with another 800,000 participants from more traditional endurance races. This

creates some skewing of data, but the results are still valuable. We have noted any instances in which we think this skewing could have impacted the data.

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 **1.5% increase in the number of registrations** from 2016 to 2017, despite reports on the declining number of race finishers from Running USA and the New York Times
- Fifteen percent of participants in 2017 had run that race in the previous year. **Twenty-six percent of 10K runners were repeat participants**, whereas marathons, triathlons, and ultramarathons retained 13%, 8%, and 8% of participants respectively.
- **Registration prices increased** across all race distances except the marathon; marathons were also the only distance to see a decrease in participation.

2 CONCLUSIONS

- While there may be fewer officially timed finishers, overall registrations are still increasing on RunSignUp. This can be explained by a diversification of events, with many events that are less about the finish times and more about fun and community or charity activities.
- For shorter races, repeat participants make up a significant number of registrations. Longer races do not attract as many repeat finishers.
- Marathons faced a decline in popularity in 2017, and are feeling pricing pressure as a result.

3 RECOMMENDATIONS

- Use creative promotions and unique themes to create a memorable, social RaceDay experience that participants are eager to share with friends and family.
- Market your event to past participants through a Loyalty Program, email marketing, and Facebook custom audiences
- Add shorter distance races to marathon events and use price increases to appeal to a larger base - both budget-conscious runners and procrastinators, and to provide strong calls to action.

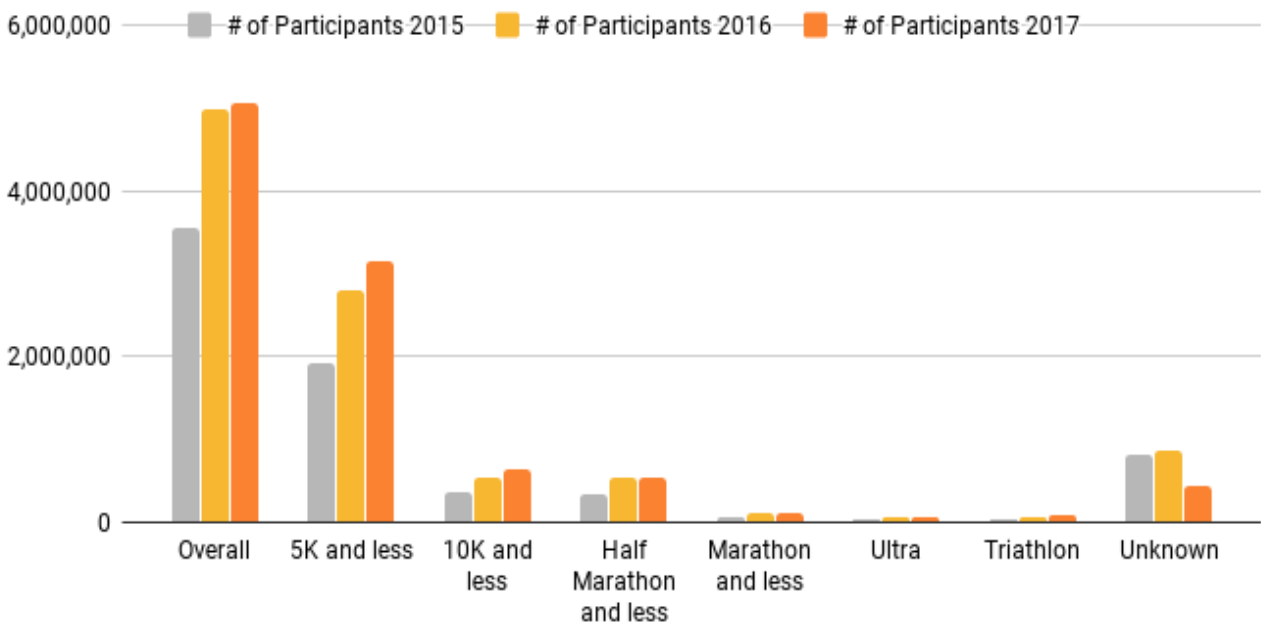
race growth 1.1

Races that used RunSignUp in 2016 and 2017 had an overall growth rate of 1.5% on a per race basis, which contrasts with Running USA Finisher data. This is likely due to the fact that many events are not timed. While there may be fewer timed finishers, there is an increase in the number of runners and non-runners participating in fun runs and charity-driven events.¹

The growth across RunSignUp races may also be related to continued improvement in our suite of marketing tools such as automated email marketing,

referral rewards, and Facebook Custom Audience reports. As race directors adapt to these tools and integrate them into their marketing plans, they are able to engage with current and potential participants more consistently throughout the race lifecycle and motivate them to register - and bring along their family and friends.

Registration Totals



¹ "The Slowest Generation: Younger Athletes are Racing with Less Concern to Time", The Wall Street Journal. <https://www.wsj.com/articles/the-slowest-generation-1379643581>

RACE TYPE	# RACES 2015	# RACES 2016	# RACES 2017	# PARTICIPANTS 2015	# PARTICIPANTS 2016	# PARTICIPANTS 2017	GROWTH
Overall	21,150	31,357	37,472	3,560,588	4,983,970	5,060,076	1.5%
5K and less	12,382	17,766	21,132	1,930,06	2,797,52	3,158,12	12.9%
10K and less	1,957	3,187	3,324	352,227	540,756	644,334	19.2%
Half Marathon and less	997	1,438	1,894	334,483	533,129	549,626	3.1%
Marathon and less	424	655	77	66,547	123,366	121,760	-1.3%
Ultra	310	497	647	32,484	50,837	55,275	8.7%
Triathlon	464	711	1,009	34,166	64,048	85,604	33.7%
Unknown	4,616	7,103	8,692	810,620	874,313	445,356	-49.1%

takeaways

1

While overall growth is small and conventional wisdom is that race growth has stalled, it IS possible to grow. Step out of your comfort zone with creative themes and twists for your RaceDay and use digital marketing to spread the word.

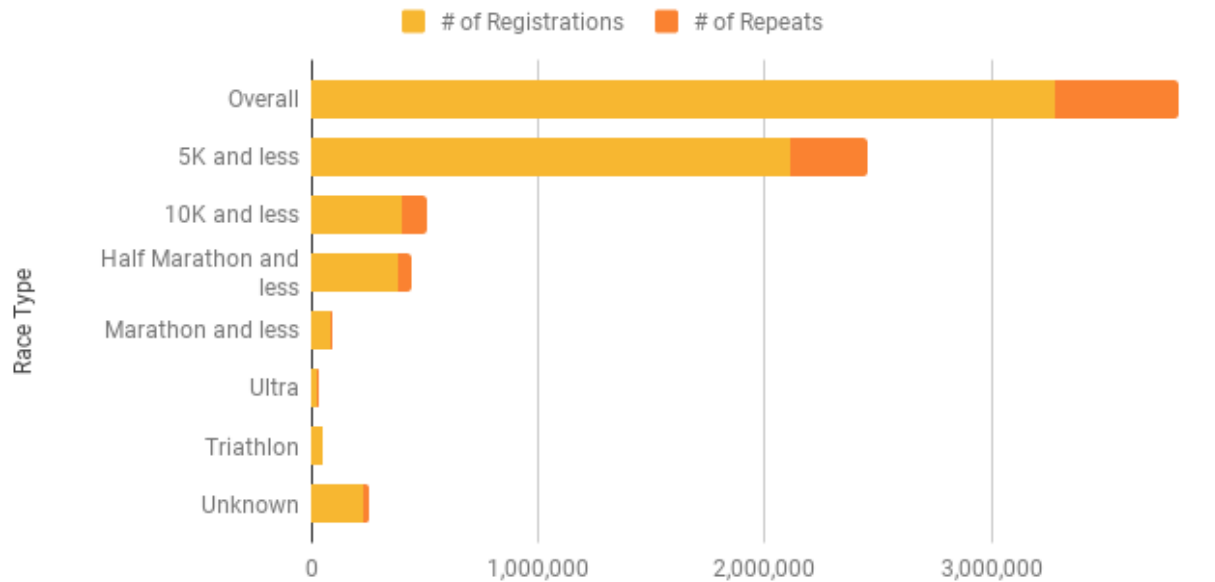
2

Focus on what happens before and after registration - promotions and a great Race Day experience - to drive registrations and referrals. Registration numbers are simply a product of how well you spread the word about your race to potential participants, and in turn, how much your event motivates those participants to spread the word for you.

repeat participants 1.2

Across all race distances, 15% of registrants had run the race in the previous year. Twenty-six percent of all 10K runners were repeat participants in 2017, whereas marathons, triathlons, and ultramarathons retained 13%, 8%, and 8% of participants respectively. This indicates that shorter races - which often involve shorter training schedules and less travel - may have better success at attracting loyal customers, while longer races, with their greater time commitments, may need expand their marketing to new participant pools.

2017 Repeat Participants



RACE TYPE	# OF REGISTRATIONS	# OF REPEATS	REPEAT %
Overall	2,485,367	363,074	15%
5K and less	1,394,920	228,478	16%
10K and less	274,097	72,125	26%
Half Marathon and less	234,422	39,943	17%
Marathon and less	46,604	6,100	13%
Ultra	14,527	1,227	8%
Triathlon	26,276	2,111	8%
Unknown	494,521	13,090	3%

takeaways

1

Don't neglect last year's participants in your marketing plan. Automated emails and Facebook Custom Audiences of previous participants (excluding current registrants) can help you to reach previous participants in multiple arenas.

2

Use referral programs, Lookalike Audiences on Facebook, and remarketing campaigns to seek out new participants to replace those who only participate in an event once.

3

Add shorter distances to long distance events and market them to the local population. Use shorter events as an opportunity for participants to build a tradition of participating in the event without committing to extended training and travel.

pricing 1.3

Average registration prices increased in 2017 for every distance except marathons, reflecting the decline in the popularity of that distance.

Note: ultramarathons represent the smallest percentage of our business, and thus the prices from year to year can be more significantly impacted by a small number of price outliers.

RACE TYPE	2015 AVG PRICE	2016 AVG PRICE	2017 AVG PRICE	% INCREASE
5K	\$25.68	\$25.75	\$26.38	2.4%
10K	\$31.92	\$31.78	\$33.10	4.2%
Half Marathon	\$57.69	\$61.21	\$64.46	5.3%
Marathon	\$87.49	\$85.93	\$84.13	-2.1%
Ultra	\$102.42	\$102.10	\$112.38	10.1%
Triathlon	\$90.09	\$87.42	\$89.18	2.0%

Average # of Price Increase

RACE TYPE	2015	2016	2017	% INCREASE
5K	0.7	0.7	0.8	14.3%
10K	0.9	1	1.2	20.0%
Half Marathon	1.5	1.7	1.9	11.8%
Marathon	1.5	1.5	1.8	20.0%
Ultra	1.2	1.3	1.6	23.1%
Triathlon	1.7	1.9	2.0	5.3%

Generally, races are moving towards more price increases during registration.

Average Difference Between Min and Max Price

There is an average of \$7-30 in price difference from the lowest to highest price for races. The longer the distance and higher the registration price, the greater the range in price.

RACE TYPE	2015	2016	2017	% INCREASE
5K	\$7.48	\$7.99	\$8.36	4.6%
10K	\$8.86	\$9.40	\$9.78	4.0%
Half Marathon	\$18.32	\$19.97	\$23.0	15.3%
Marathon	\$26.38	\$27.4	\$29.52	7.7%
Ultra	\$45.18	\$30.42	\$32.12	5.6%
Triathlon	\$25.67	\$34.12	\$27.52	-19.3%

takeaways

1

Price increases are common, and expected by runners. Use them as a strong call to action to drive early registrations. Communicate the deadlines clearly to maximize the benefit of your price increases.

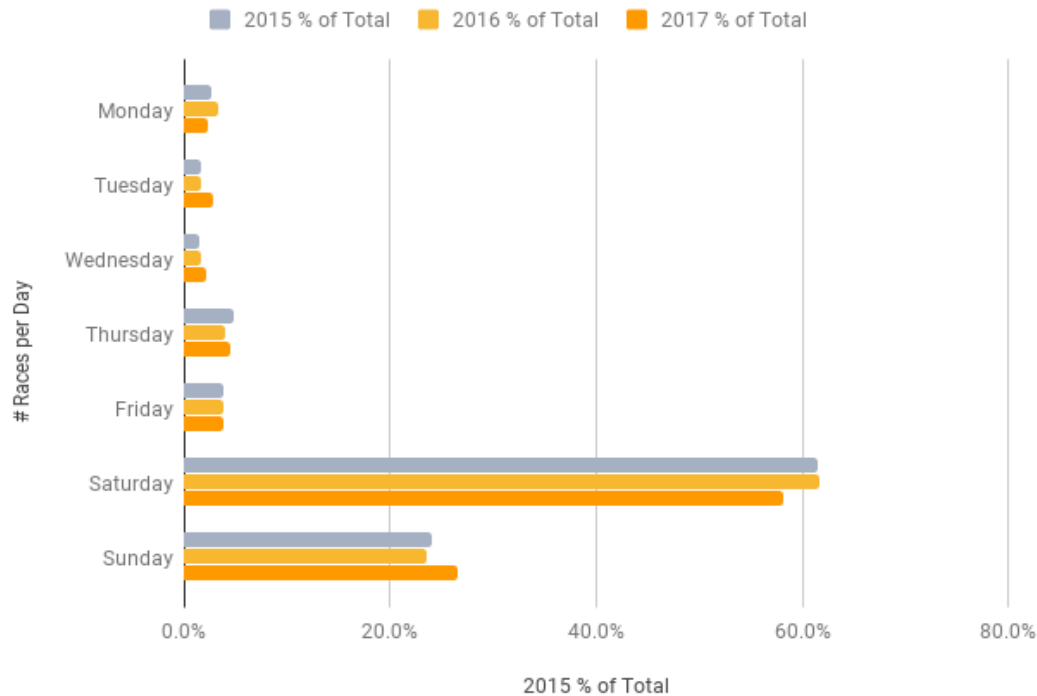
2

For longer races, there is pricing pressure. Think of focusing more resources on having shorter events tied to your premier marathon events.

3

Allow runners to transfer from one event to another after registration. The knowledge that they can switch to a shorter event if their training gets derailed removes some of the hesitation to register early. You can also implement a small fee for the transfer as another source of revenue.

Race Days



Races per Day

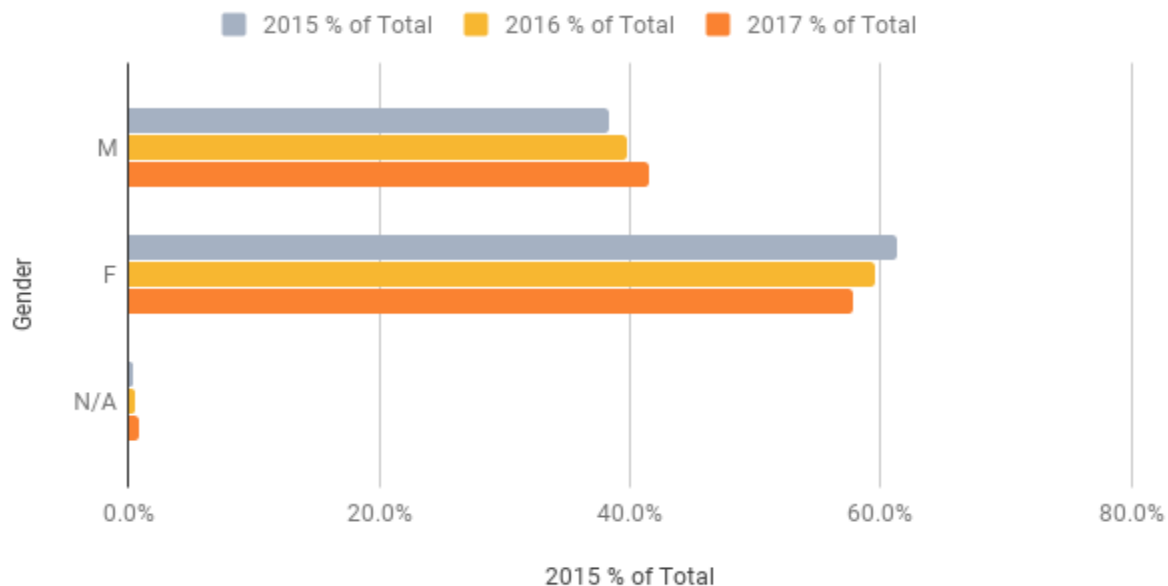
DAY	2015 % OF TOTAL	2016 % OF TOTAL	2017 % OF TOTAL
Monday	2.7%	3.3%	2.3%
Tuesday	1.6%	1.7%	2.8%
Wednesday	1.5%	1.7%	2.1%
Thursday	4.8%	4.0%	4.5%
Friday	3.9%	3.9%	3.8%
Saturday	61.5%	61.7%	58.1%
Sunday	24.0%	23.6%	26.5%

Races are consistently held on weekends, with Saturday more dominant than Sunday.

gender and age trends 1.5

Consistently, more women than men register for races. This mirrors the shift in running evolving from a solitary to a social experience, and in races shifting from competitive runs to charity and donation-focused events. The last three years have seen a small uptick in the percentage of males participating; however, since the change is still minor, we will have to see the next few years' of data to determine if this represents a true pattern.

2015 % of Total vs. Gender

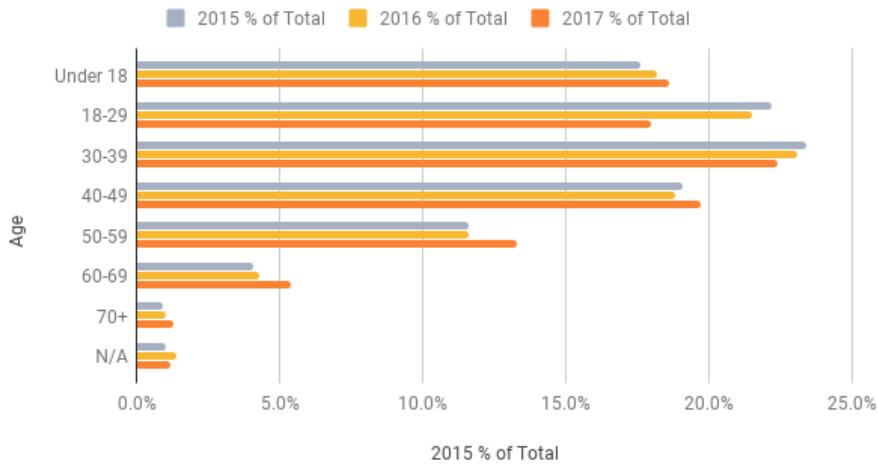


GENDER	2015 % OF TOTAL	2016 % OF TOTAL	2017 % OF TOTAL
F	61.2%	59.6%	57.8%
M	38.4%	39.8%	41.5%
N/A	0.4%	0.5%	0.8%

While there is a wide range in participant's ages, there's a clear drop off as you get into the 50's and 60's...and 59% of participant's are under the age of 40.

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.

Age



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

takeaways

1

Include women in images and marketing materials that promote your brand.

2

A variety of distances and levels of competitiveness can help to draw out a variety of generations. Create marketing to encourage the whole family to come out!

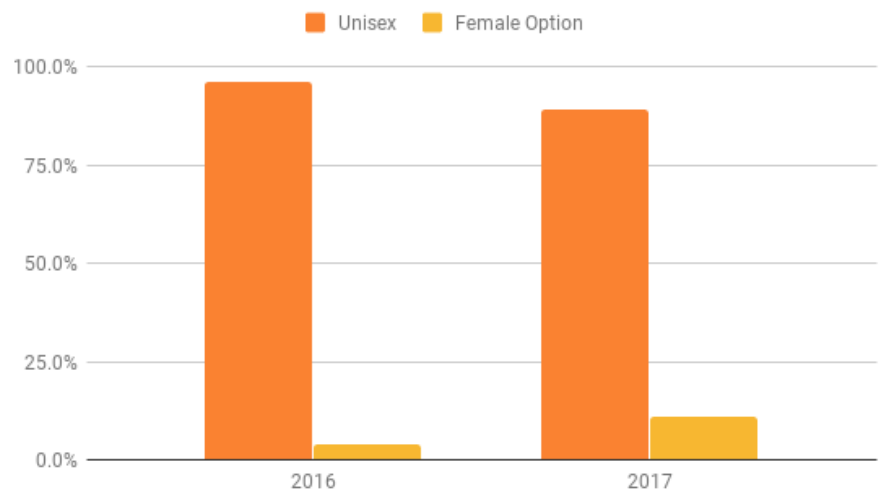
3

Think tech: the majority of runners are under 40, and are accustomed to slick technology. Mobile registration, RaceDay online registration, and notifications are basic expectations for younger runners; GPS Tracking provides real-time updates and mechanisms for social and sponsor engagement.

giveaways 1.6

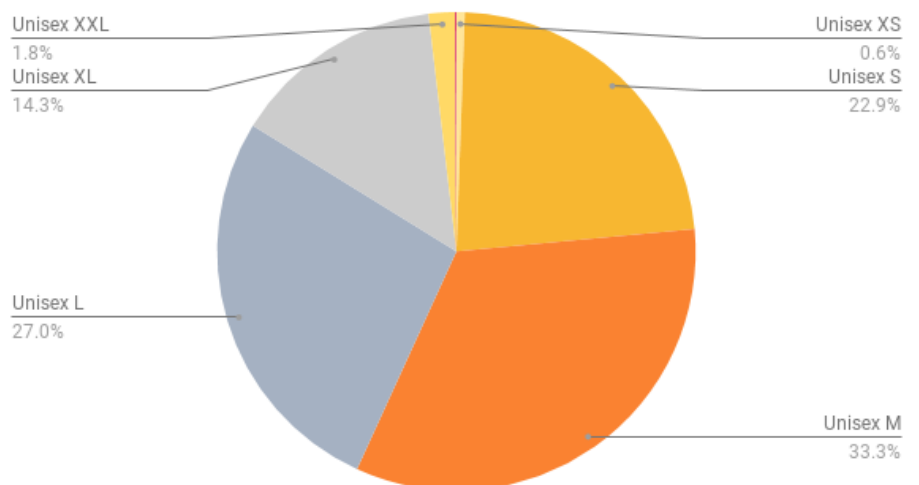
Most races offer unisex shirts; only 3.8% of 1.6 million race shirts are female size and fit.

% Female Option



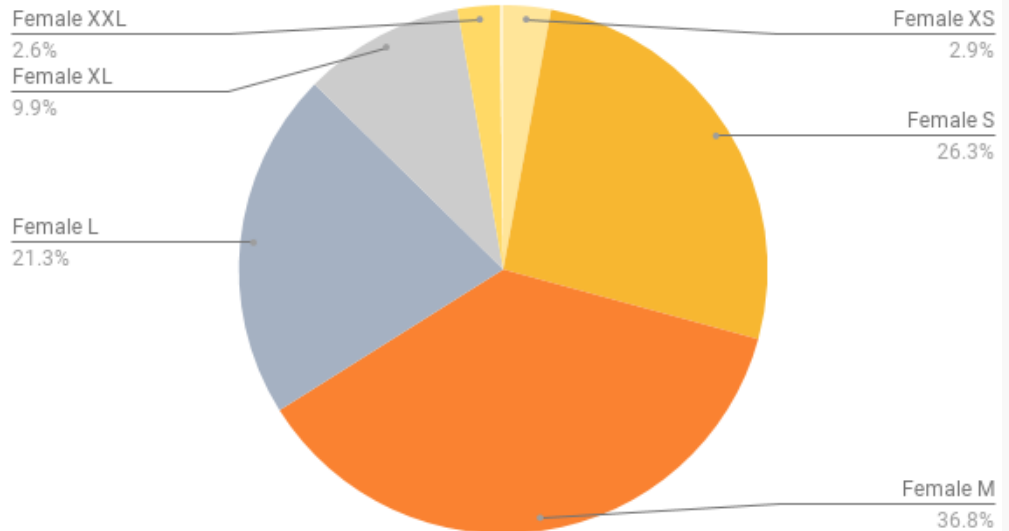
For unisex shirts, the size breakdown is:

Unisex Shirt Sizes 2017



For female shirts, the breakdown is:

Female Shirt Sizes



takeaway

1

Women make up the majority of event registrants (58%) - make them feel welcome and valued with gender-specific giveaway options. It's a win-win for you: runners are more likely to wear a giveaway item (advertising for your event) when it fits them well!

promotion

1

KEY FINDINGS AND TRENDS

- Coupons are being used more frequently, and are helping to convert interest into commitment - the average **ROI on coupons increased from 310% in 2016 to 340% in 2017.**
- Six percent of registrations come from Referral Rewards, with percentages extending to eighteen percent when significant rewards are offered. The financial returns are impressive with a **CPA (Cost per Acquisition) of typically less than \$1, and ROAS (Return on Ad Spend) typically 1,000%+.**
- When races have groups or teams, **over 30% of runners join a group.** That number increases when groups or teams offer prizes and incentives.
- Our RaceInsights data shows that the **largest source of registrations is people going directly to a race's website.**

2

CONCLUSIONS

- Participants respond to discounts, and as a result, coupons are increasingly common in the endurance event industry.
- Referral Rewards may be the most effective marketing campaign to boost registrations.
- Races that have groups and teams, even if there are no incentives attached to joining, add a social element that many participants seek when registering for events.
- Above all, SEO (Search Engine Optimization) is critical for races to create traffic to their website and convert page views to registrations.

3

RECOMMENDATIONS

- Incorporate coupons into your pricing strategy and set time limits to encourage action.
- Implement Referral Rewards for an immediate (and cost-effective!) impact on registrations.
- Add groups and teams to your next event. Encourage group joining by offering team discounts, refunds, or prizes.
- If you aren't using a RunSignUp website, check your SEO (Search Engine Optimization) to ensure it is easy find you on Google, and don't forget about Facebook ads, email marketing, and affiliate listings.

2.1 coupons

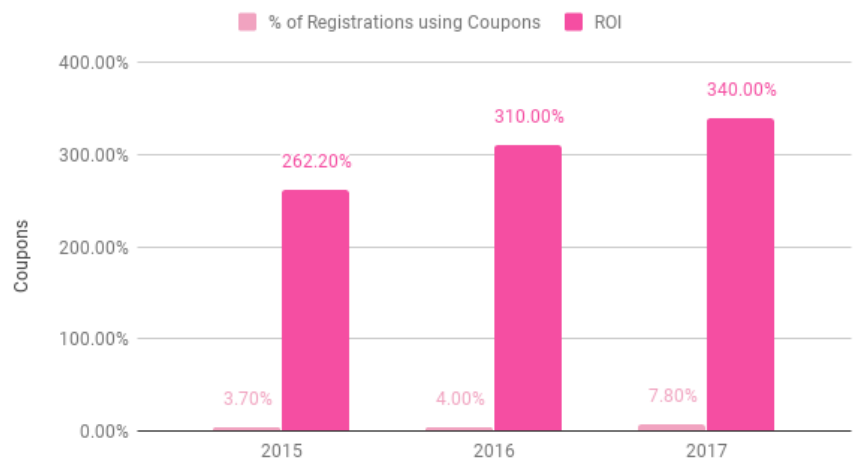
Coupon usage increased from 4% of registrations in 2016 to 7.8% of registrations in 2017. The average discount also increased from \$12.04 to \$15.69. But the

payback was excellent - there was an increase in ROI from 310% to 340%.

COUPONS	% OF REGISTRATIONS USING COUPONS	ROI	AVERAGE DISCOUNT	TOTAL DISCOUNTS	NET REVENUE FROM COUPONS
2015	3.70%	262.20%	\$13.03	\$2,137,204	\$5,604,445
2016	4%	310%	\$12.04	\$2,907,418	\$9,012,947
2017	7.80%	340%	\$15.69	\$3,684,319	\$12,526,890

Our numbers exclude about 120,000 100% off coupons. These are typically used for Groupon/Living Social style promotions, as well as for sponsor and elite free entries.

Coupons



takeaways

1

Use coupons as a call to action to sign up for a race.

2

Add time-limited coupons to your referral rewards program to provide a "gift" that a referrer can use to entice their friends to sign up for your race.

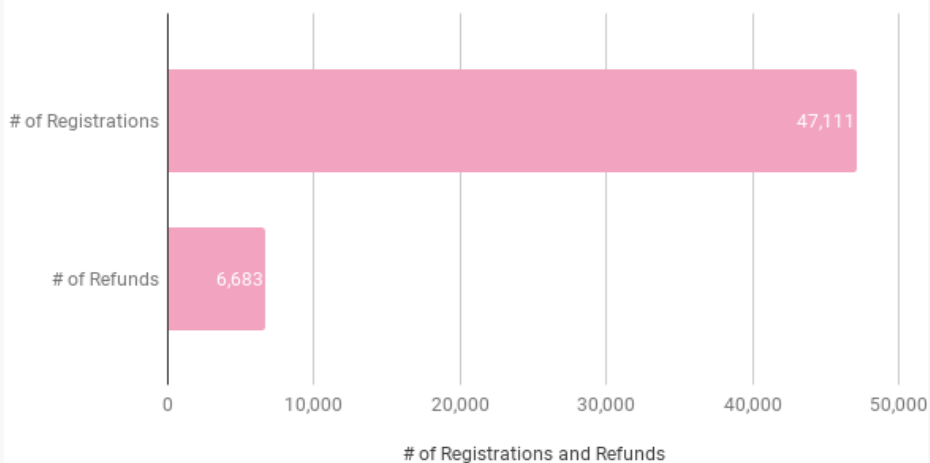
referrals 2.2

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%+:

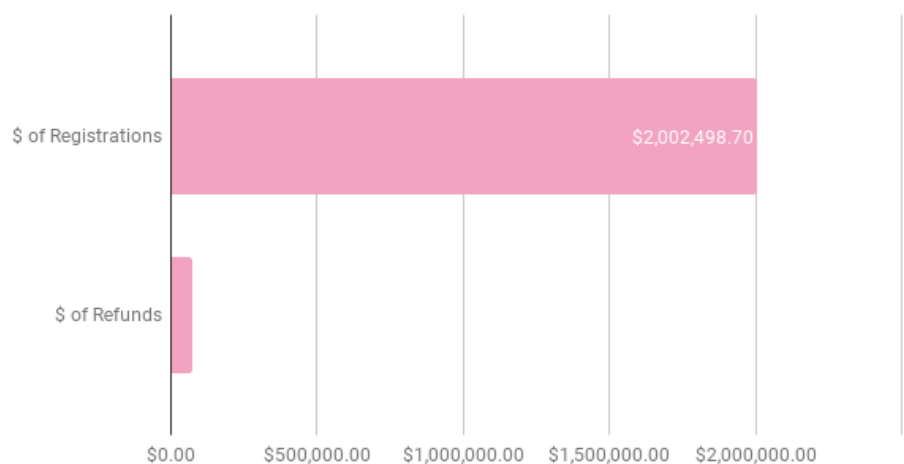
Referral Rewards Payback - # of Registrations



Referrals represent 14 new participants for each refund, measured across all races with Referral Rewards programs.

That is a ROAS of over 2,700%. 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%+.

2017	
No. Referral Codes	126,629
No. Race Page Views	1,482,153
No. Sign Up Page Views	78,389
No. Completed Registration Transactions	38,508
No. Completed Registrations	47,111
Completed Registration Amounts	\$2,002,498.70
No. Referral Refunds	6,683
No. Physical Referral Refunds	5,749
(Multiple refunds on a single day are merged into one physical refund)	
Estimated Referral Refund Amounts	\$70,552.69
Estimated ROI	\$1,931,946.01 (2,738%)
Estimated CPA	\$1.50

takeaways

1

Implement Referral Rewards for an immediate impact on registrations. There is no more trustworthy advocate for your event than 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.

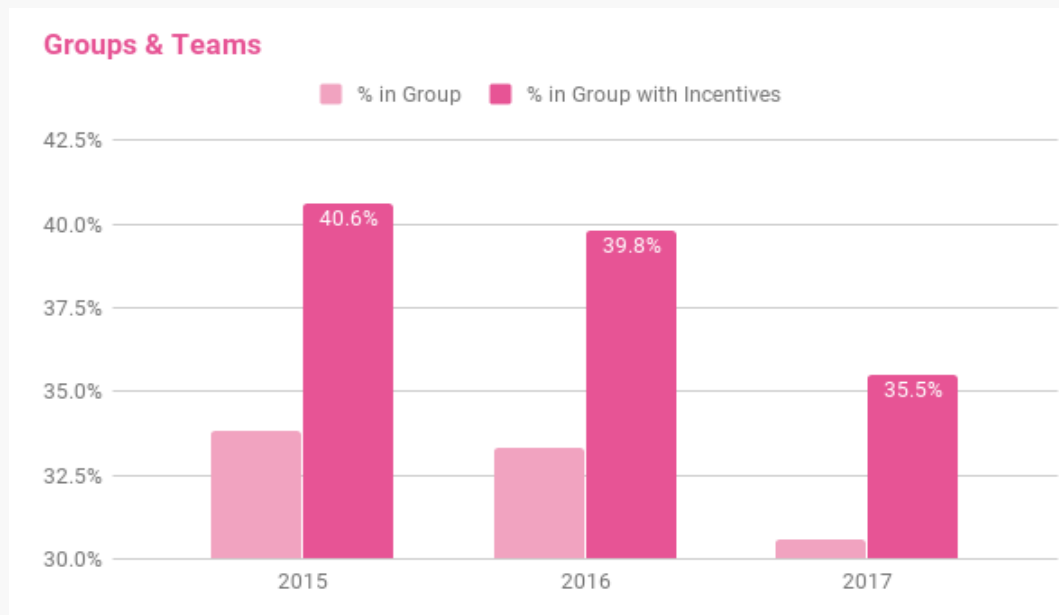
groups & teams 2.3

Adding groups or teams to your race is a viral strategy for growing your race. Groups/teams meet an increasing demand for races to be social, shared experiences, and many races offer a social group option with no tangible prizes or competitive aspect. For those events, the simple chance to participate with family and friends is the reward. Other races provide benefits to the largest teams, or give lower prices (or refunds) to teams reaching a

specified size.

Of the races that had teams, we saw over 30% of participants signup with a team rather than as an individual. When there were incentives for teams, that number increased to over 35%.

Note: The “fun run” series that departed this year had a robust social group component, likely accounting for the slight drop in group joining this year.



“

We did a lot of team and relay stuff: Everybody wants to do it with someone else, everyone wants to be a part of a group, everybody wants to do it with their friends...so why not create a team.

Dee Stathis

”

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

takeaways

1

Offer a social team option, and use your email and social media marketing to ensure that participants know about the program.

2

Use flexible participant management options to allow participants to create and join teams themselves either during or after registration.

3

Provide incentives for teams. Either offer a discount/refund for teams of specific sizes, or reward your biggest teams with something tangible - custom shirts, a tent on race day, a private port-a-potty...be creative!

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.¹ Our aggregate data shows that the largest source of registrations is people going directly to a race's website, whether that is PittsburghMarathon.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. PittsburghMarathon.com). However, races that use RunSignUp's race website as their primary or only website would be counted.²

Google	19.1%
Email	6.5%
Facebook	5.5%
RunSignUp Affiliates	2.9%
Bing	1.3%
Yahoo	0.3%

¹ Since not all races use RunSignUp's free email marketing system, the email category is probably under-reported on an overall basis.

² For example, Google "Scott Coffee Run". The first search result will direct you to the Scott Coffee's race website on RunSignUp. This web referral source would attribute the click on RunSignUp.com/ScottCoffeeRun to Google.

“

We're really excited about the impact that RaceInsights will have on our ability to grow our national program. The demographic graphs are simple to understand, but give us all the information that we need to determine the regions to target and the promotion graphs will help us to understand what marketing efforts are resulting in registrations.

Tamara Conan, Healthy Kids Running Series

”

RunSignUp affiliates drive 2.9% of registrations. There are over 100 affiliate websites that either integrate RunSignUp's API feed of new races into their website or use the automated calendar widget to generate their own race calendar. RunningintheUSA.com and HalfMarathons.net are two of the largest RunSignUp affiliates

that automatically list all RunSignUp races. Local running store calendars can be important as well; while there are a number of running stores and running clubs that use RunSignUp's automatic race calendar widget, make sure you are listed on the popular local race calendars in your community.

takeaways

1

Pay attention to your SEO, as Google is more important for finding a race than Facebook.

2

Don't forget Facebook - races that advertise heavily generate as many as 70% of their registrations from Facebook.

3

Use effective email marketing and "call to action" incentives like price increases (read more later).

4

List your race in as many local race and running club calendars as possible.

email marketing 2.5

We used our RaceInsights data this year to augment our understanding of what marketing tools are most effective in terms of driving registrations and optimizing marketing spend. As covered above, the free RunSignUp Email Marketing system accounted for 6.5% of registrations as a direct referral source. This means that people clicked on an email link to the

race's website or registration path and signed up for the event.

The second set of data that we gathered is a drill-down look at the effectiveness of two automated emails that the RunSignUp email marketing system sends - Price Increases and Incomplete Registrations. We started collecting this data in November, 2017. Therefore, the stats are from a smaller

sample, as only 787 races turned on automated price increase emails and only 2,321 races turned on incomplete registration emails.

However, the trends are material. Automated emails are free and require no effort from the race director. **In November 2017, 2,483 registrations (0.5%) came from the price increase email and 392 from the incomplete registration email.**

takeaways

1

Send emails - especially ones with a "Call to Action" to SignUp and a motivating factor to drive action - price changes, time-limited coupons, etc.

2

Setup automated emails to automatically promote price increases, holiday specials or "last chance" price changes.

3

Turn on incomplete registration emails. These messages get automatically sent to people who did not complete registration several days after they started to register.

registration

1 KEY FINDINGS AND TRENDS

- Nearly **29% of race registrations took place during race week**, a significant increase from 21.5% in 2016.
- **Over a quarter (27.8%) of all registrations take place within the 3 day period prior to a price increase** or registration closing date.
- **Mobile devices account for over 60% of race website traffic**, but 60% of transactions still occur via desktop.

2 CONCLUSIONS

- Runners are increasingly signing up on RaceDay and the days leading up to the event, rather than weeks or months in advance.
- Price and time-based incentives motivate runners to sign up.
- While conversion is still lower on mobile devices, the number of transactions completed on mobile is rising faster than the number of mobile users clicking on race websites.

3 RECOMMENDATIONS

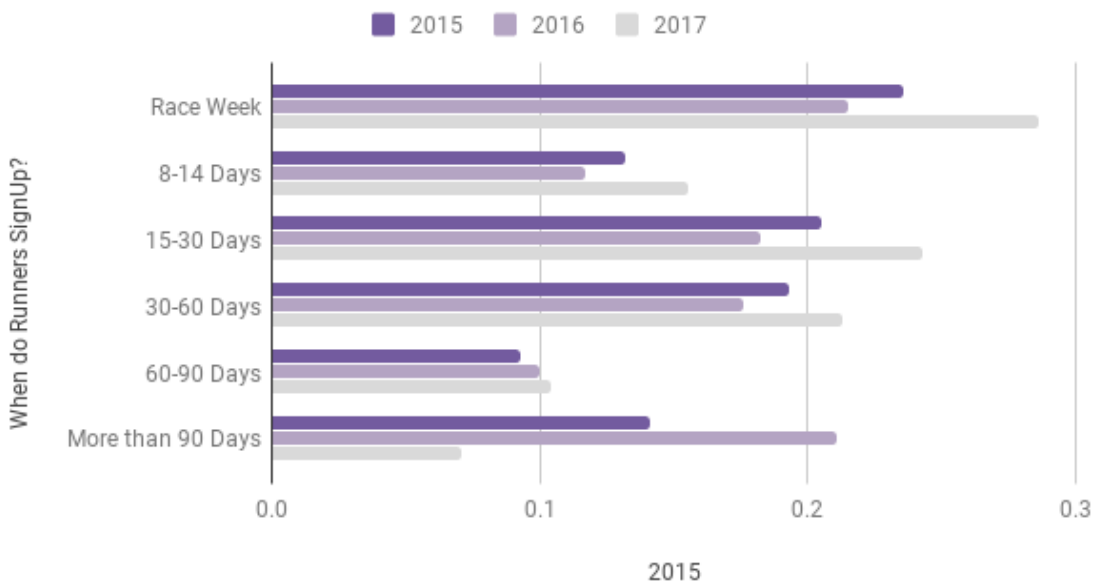
- Keep registration open until the gun goes off! Use RaceDay Go to cut labor and save time with online registration, kiosk and mobile registration, and real-time syncing with timer software.
- Set up automated emails to notify past and current participants of upcoming price increases to encourage early registration.
- Make sure that your race's website has mobile responsiveness. All of RunSignUp's race websites are automatically configured for mobile devices.

registration days 3.1

In 2017, there was a significant increase in the number of people signing up during race week. Most races keep registration open through the gun time of their race rather than closing registration 3-7 days before the event.

Note: while our numbers demonstrate this trend, our 2016 data is potentially skewed by the large "fun run" series that left RunSignUp and was known for aggressive early marketing campaigns.. The 2018 data will be more reliable.

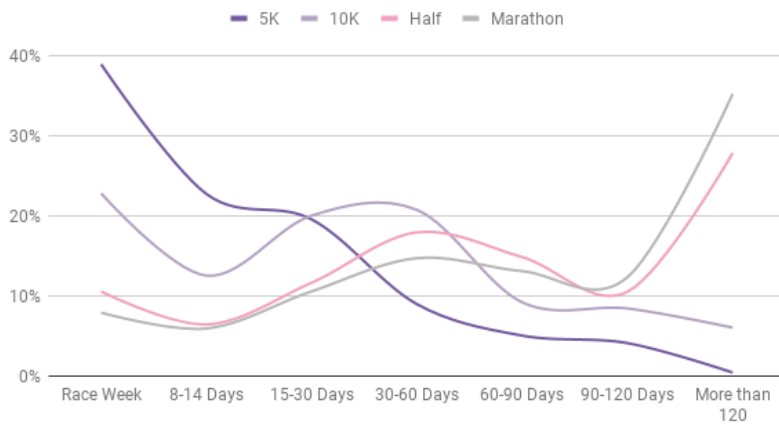
When do Runners SignUp?



WHEN DO RUNNERS SIGNUP?	2015	2016	2017
Race Week	23.6%	21.50%	28.60%
8-14 Days	13.2%	11.70%	15.50%
15-30 Days	20.5%	18.20%	24.30%
30-60 Days	19.3%	17.60%	21.30%
60-90 Days	9.3%	10.00%	10.40%
More than 90 Days	14.1%	21.10%	7.10%

Looking at the SignUp timeframe data by race distance shows some differences depending on the event. Shorter distances see fewer early registrations, with 5K runners showing a significant tendency to make later decisions, while longer distances tend to get early commitments to allow for longer training cycles.

SignUp # of Days Before Race



	5K	10K	HALF	MARATHON
Race Week	39%	23%	11%	8%
8-14 Days	23%	13%	6%	6%
15-30 Days	20%	20%	12%	11%
30-60 Days	9%	21%	18%	15%
60-90 Days	5%	9%	15%	13%
90-120 Days	4%	8%	11%	12%
More than 120	0%	6%	28%	35%

takeaways

1

Open your race early, particularly for longer events that require a lengthy training cycle.

2

Leave registration open until the gun goes off - RaceDay Go 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

Promote your race throughout it's full lifecycle to capture participants with variable levels of motivation.

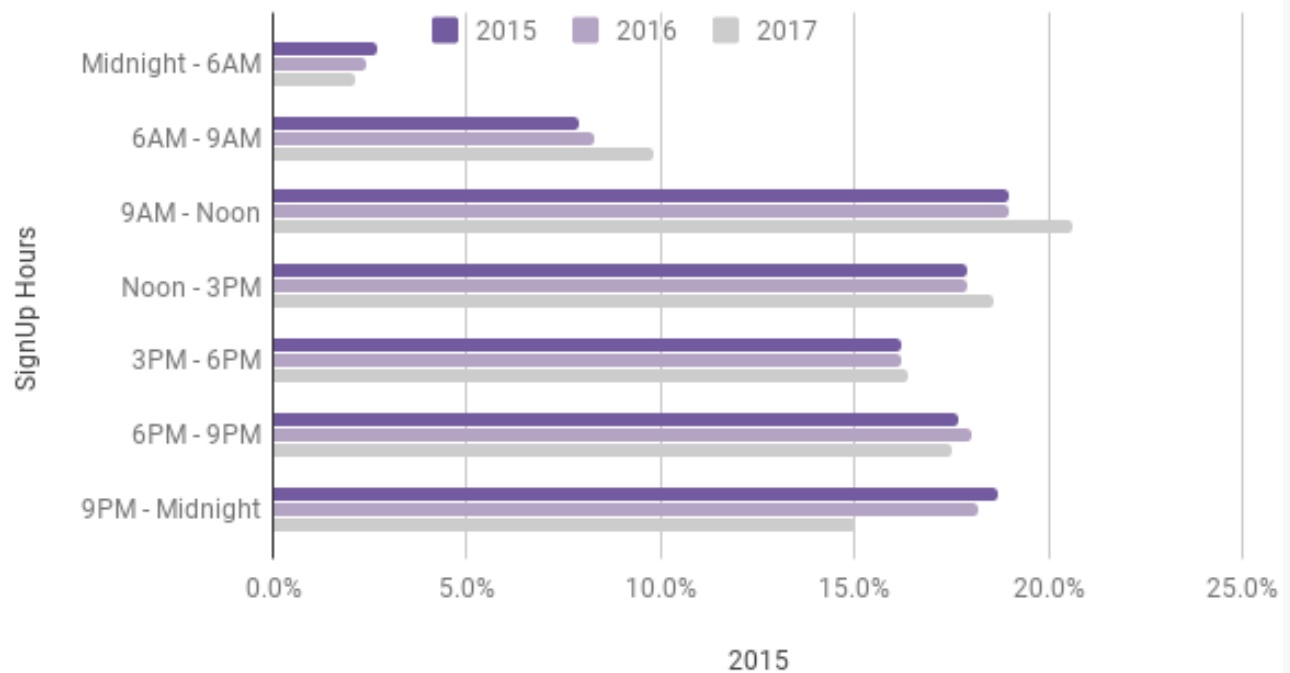
4

Provide incentives to early registrants with strong "calls to action" like price increases. Longer, more expensive races often have as many as 5 price increases.

registration times 3.2

With work computers, laptops at home, and mobile phones, participants are online and ready to register throughout the day. SignUps do drop off significantly after midnight, with a bump during the early work hours of 9:00am-noon.

SignUp Hours



SIGNUP HOURS	2015	2016	2017
Midnight - 6AM	2.7%	2.7%	2.1%
6AM - 9AM	7.9%	7.9%	9.8%
9AM - Noon	19.0%	19.0%	20.6%
Noon - 3PM	17.9%	17.9%	18.6%
3PM - 6PM	16.2%	16.2%	16.4%
6PM - 9PM	17.7%	17.7%	17.5%
9PM - Midnight	18.7%	18.7%	15.0%

takeaways

1

Roll out emails and ad campaigns in the morning when participants are likely online.

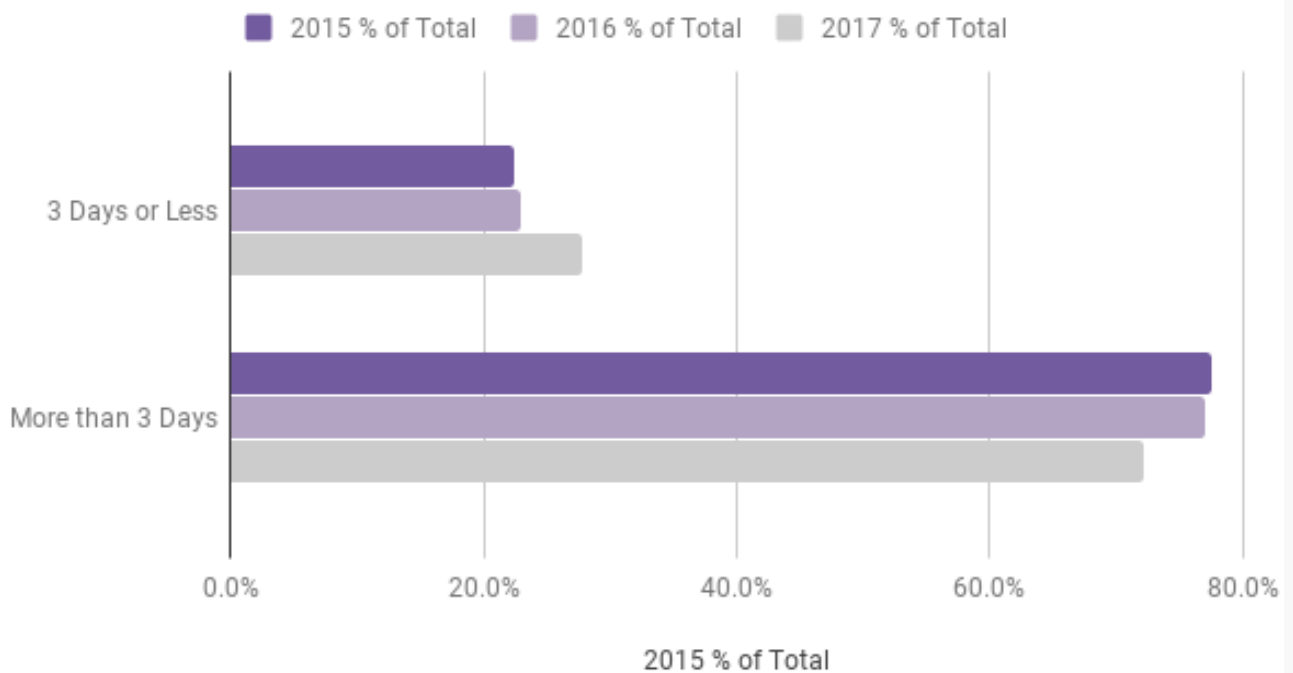
2

Run evening specials when people are getting home, from 6:00pm-midnight. The biggest single hour for registration is 8-9PM.

pricing strategies 3.3

Over a quarter (27.8%) 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





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

takeaways

1

Don't just HAVE price increases, take advantage of them. Make sure you are 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

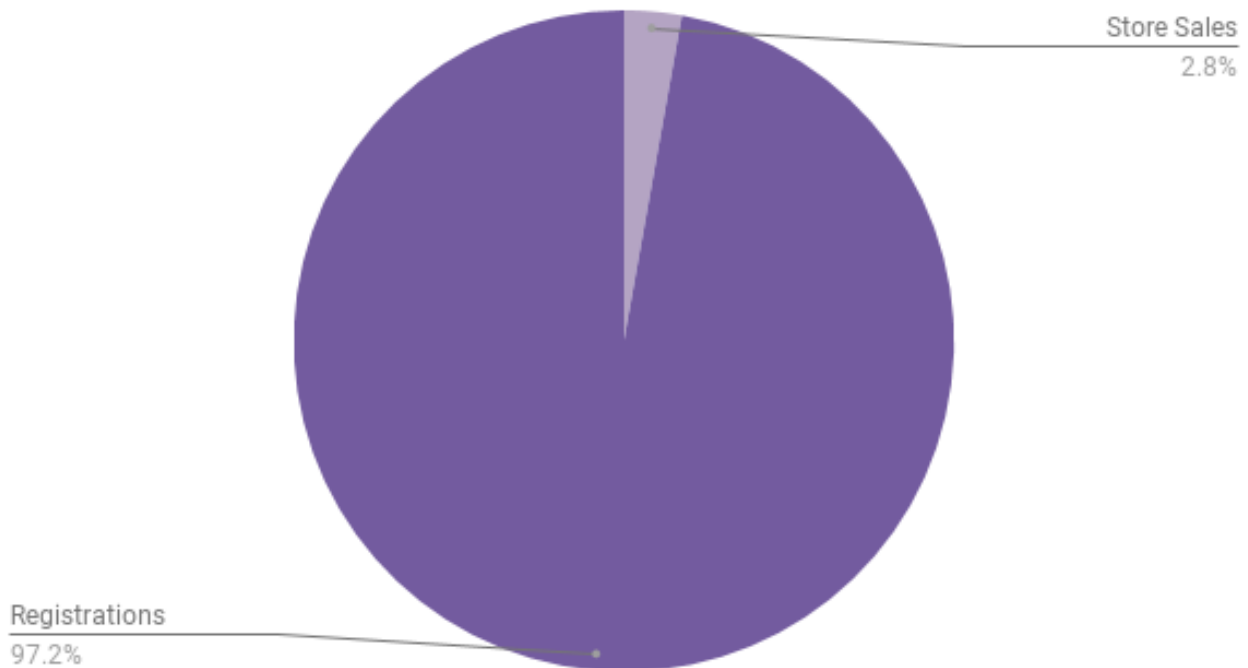
When you offer coupons, tie them to strict timelines to inspire immediate action.

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 1,911 races that had an add-on option, the percentage of total sales value derived from add-ons declined to 2.9% in 2017, down from 5.6% in 2016. This drop is likely due to the loss of the large “fun run series” that offered a large variety of merchandise.

2017 Store Revenue



STORE SALES	2015	2016	2017
# of Races			2453
Store Sales	\$1,932,837	\$4,209,643	\$2,101,020
Registrations	\$41,953,509	\$74,680,457	\$72,543,404
% Store Sales	4.6%	5.6%	2.9%

takeaways

1

Add-ons are more than just a chance to increase revenue. When you offer experiential add-ons - VIP parking passes, access to a post-race event, names on your bib - you boost both your bottom line and the impression a participant has of your event.

2

Enable participant self-management options for your add-ons to allow participants to edit their selections without race director intervention.

web analytics 3.5

This section looks at RunSignUp's overall web analytics to create an overview of how participants find race websites and what devices they use.

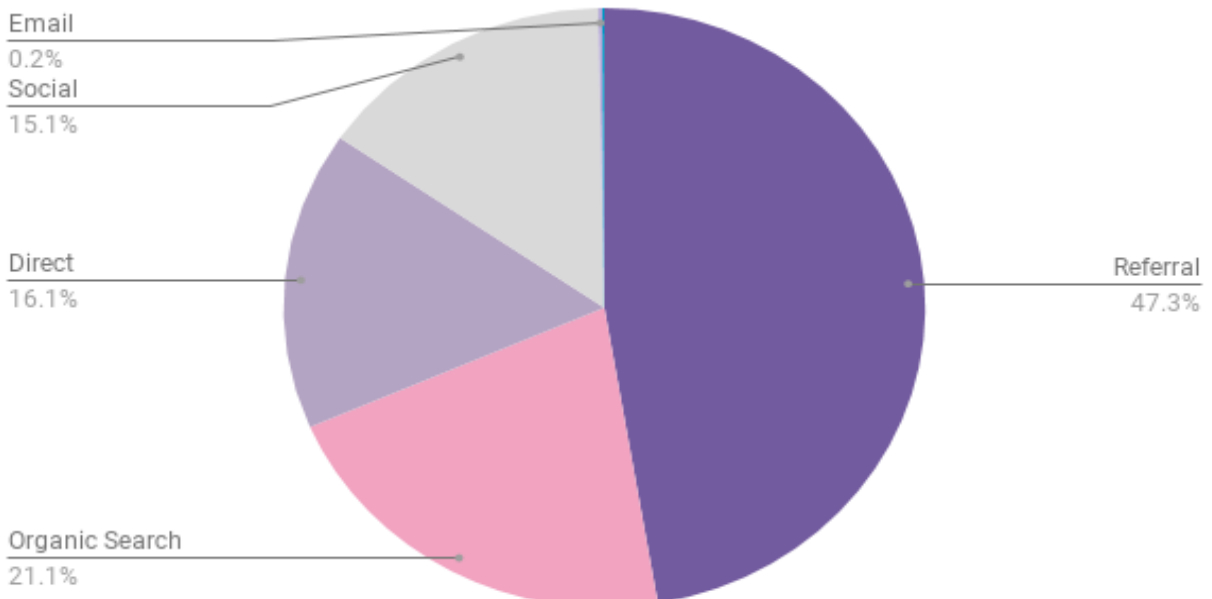
This data is based on reports from Google Analytics for September of each year 2015-2017. This chart

shows the volume of traffic and \$ of transactions processed that were reported to Google Analytics (it does not capture all sessions and traffic, but the data is reported on this volume).

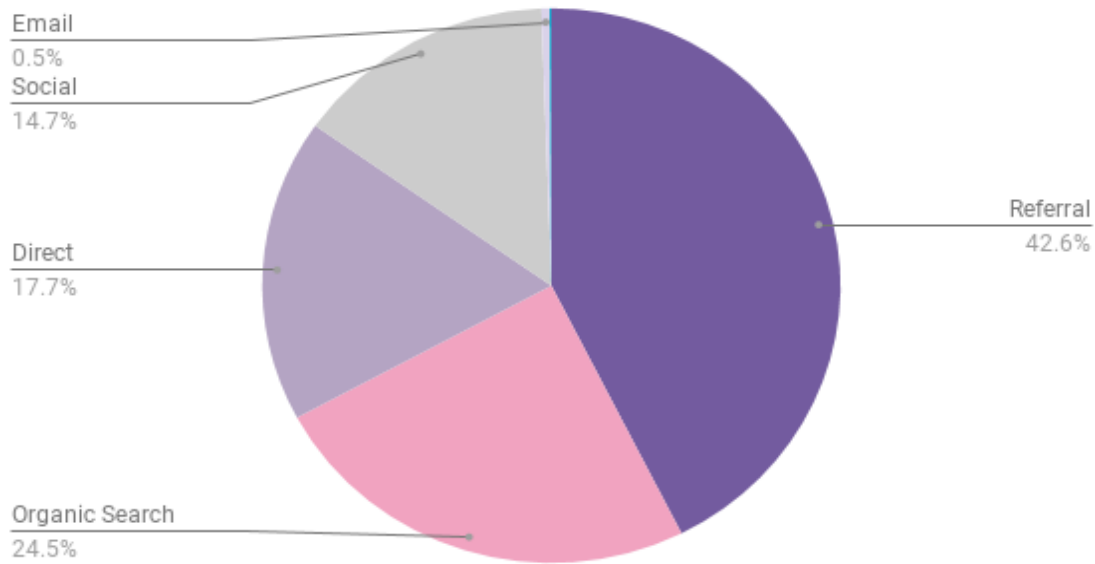
	SESSIONS	\$ TRANSACTIONS
Sept 2015	1,782,000	\$ 8.7M
Sept 2016	2,866,000	\$ 12.8M
Sept 2017	3,421,377	\$13.5M

The following charts show the source of those visits.

Sept. 2016 of Web Visitors



Sept. 2017 Source of Web Visitors



SOURCE	SEPT. 2015	SEPT. 2016	SEPT. 2017
Referral	53%	47%	42%
Organic Search	18%	21%	24%
Direct	15%	16%	18%
Social	12%	15%	15%
Email	0.4%	0.2%	0.5%
Paid Search	0.1%	0.1%	0.1%

web analytics 3.5

Referrals are the primary source of website traffic, representing either race calendars like RunningintheUSA.com (at 7.5%) or websites for races, timers, or race series (like VTMTS.com or pittsburghmarathon.com). Direct traffic is made up of runners who came directly to the race webpage or to the RunSignUp.com homepage.

The growth from 2016 to 2017 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 39% of visitors coming from organic search and social interactions, they remain the best way for a race to attract visitors.

Note the low rates for email; this may be 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.

Social Value

Google Analytics tracks social interactions. These are 97% on Facebook with small share from Twitter and Instagram. The contribution to overall race revenue is relatively small, but growing:

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

takeaways

1

Search engine optimization (SEO) is crucial! Many people are searching for an event online, and you need to ensure they can find your event. If you aren't using an optimized RunSignUp website, google your own event to see how easily it pops up.

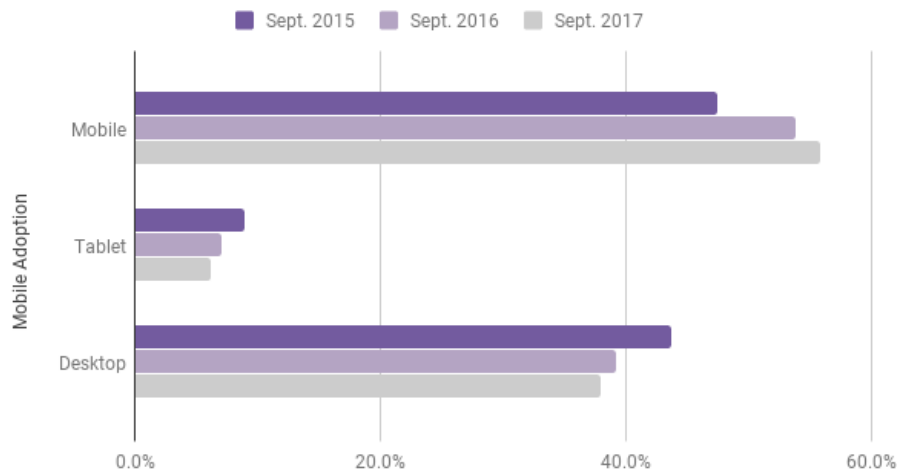
2

Race calendars are reliable sources of information for runners. In addition to public calendars like RunningInTheUSA.com and affiliates that automatically load local RunSignUp races, make sure your event is on any calendars at local running stores and running clubs.

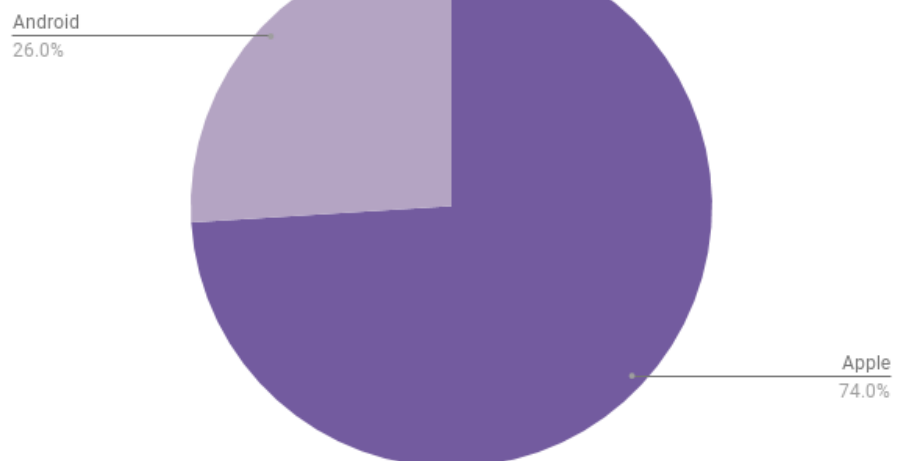
mobile adoption 3.6

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 54% in 2016 to 56% in 2017. Views on both tablets and desktops fell during the same time period.

Mobile Adoption Sept. 2015 to 2016



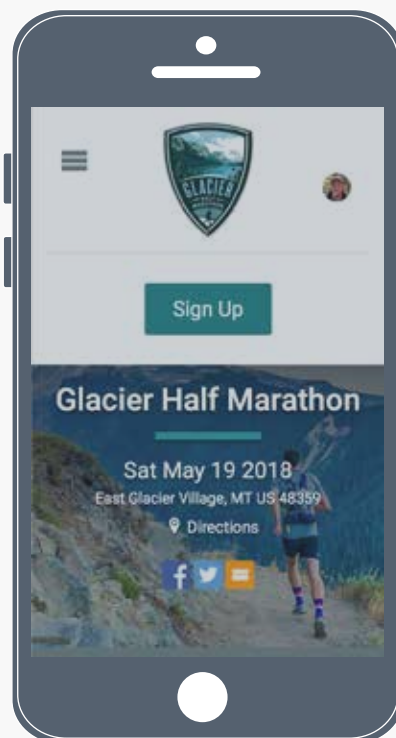
Apple stayed at a dominant 70% market share in 2015 and 2016 among visitors to RunSignUp Race Websites:



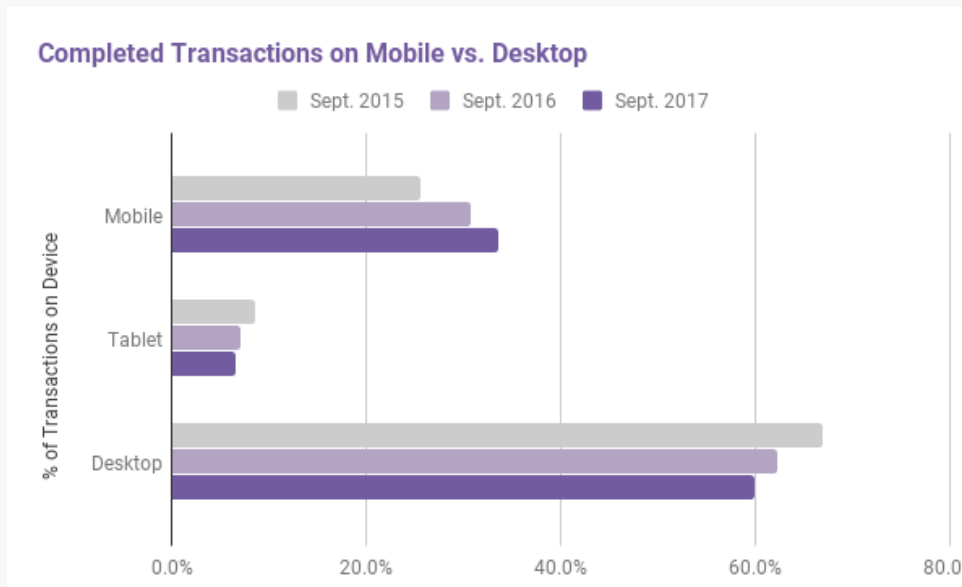
mobile adoption 3.6

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

+60%
TRAFFIC IS FROM
MOBILE
USERS



While the traffic is now over 60% 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 continued improvements in mobile technology.

% OF TRANSACTIONS ON DEVICE	SEPT. 2015	SEPT. 2016	SEPT. 2017
Mobile	25.6%	30.7%	33.5%
Tablet	8.5%	7.0%	6.5%
Desktop	66.9%	62.2%	60.0%

takeaways

1

Know the technology your participants are using. Test your website, registration and kiosks on a variety of mobile devices, with an emphasis on Apple products.

2

Participants are increasingly comfortable finalizing a registration - not just scouting events - on their mobile devices. Keep your registration simple to capitalize on mobile conversions.

donations & fundraising

1

KEY FINDINGS AND TRENDS

- The majority of donors make relatively small donations, with 71.1% of donors contributing \$25 or less. However, we found that **36.4% of all donation money collected was from the 0.003% of donors who contributed more than \$500.**
- A checkbox donation option during registration encourages giving. **Races raised \$1,244 on average from checkbox donations,** as compared to \$527 raised by events with traditional open-ended donations or donation levels.
- Races that engage fundraisers are the most successful at collecting donations, with **fundraising-enabled races raising on average \$4,165.**

2

CONCLUSIONS

- A successful donation campaign needs to reach many small donors, and a few big contributors.
- Donations that are as easy as a simple click make participants more likely to give during registration, particularly when they sign up via mobile.
- A community that is engaged in fundraising can reach a wider range of potential donors through peer-to-peer engagement.

3

RECOMMENDATIONS

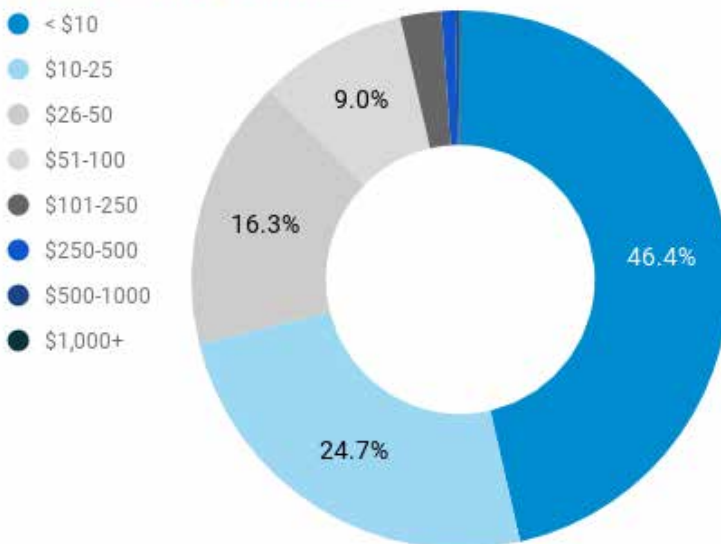
- Create donation levels to encourage a range of donors. Use donation level names and descriptions to demonstrate the value of each donation. For example, provide short descriptions of how donor dollars will be used by the charity.
- Add a checkbox donation option to your checkout to give runners a low-effort option to contribute.
- Activate your network of supporters as fundraisers to maximize your fundraising capabilities. Offer fundraising rewards and share stories of fundraising dollars at work to keep your fundraisers engaged and motivated.

4.1 number and value of donations

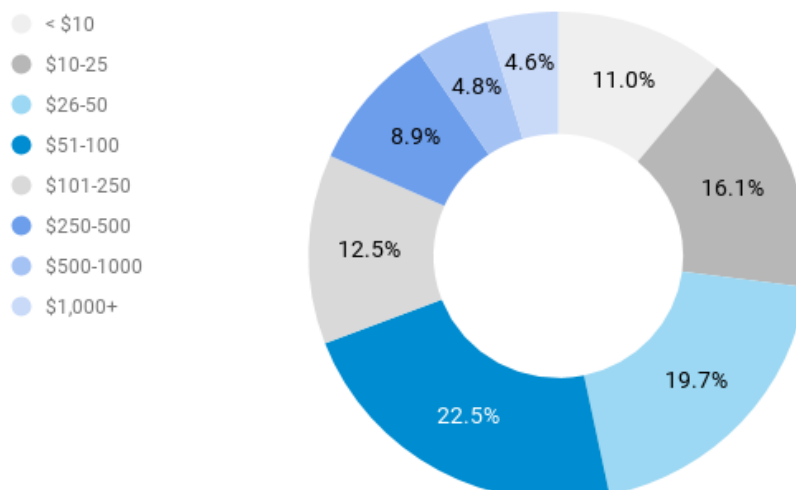
The figure below shows the average number and value of donations in 2017. The wide range of donation amounts is instructive: it's important to engage donors of all levels. While a donation less than \$10 may not seem like much, these donations aggregated to \$885,000+ in 2017 (7% of all

donations collected). On the flip side, while only 0.003% of people donated more than \$500, those donation levels still account for 36.4% of all donation dollars collected on the site.

Number of Donations



Value of Donations



donations 4.1

DONATION AMOUNT	NUMBER OF DONATIONS	VALUE OF DONATIONS
< \$10	144,220	\$885,989
\$10-25	76,740	\$966,990
\$26-50	50,711	\$1,221,545
\$51-100	27,821	\$1,706,694
\$101-250	7,680	\$1,821,761
\$250-500	2,554	\$1,466,448
\$500-1000	701	\$2,316,214
\$1,000+	223	\$2,310,340

takeaways

1

Setup a wide variety of donation levels, and assign real values to your levels with names or descriptions that demonstrate the difference those dollars can make to the organization.

2

Offer a low donation level (under \$10) to keep participants of limited means feeling engaged and needed by your mission.

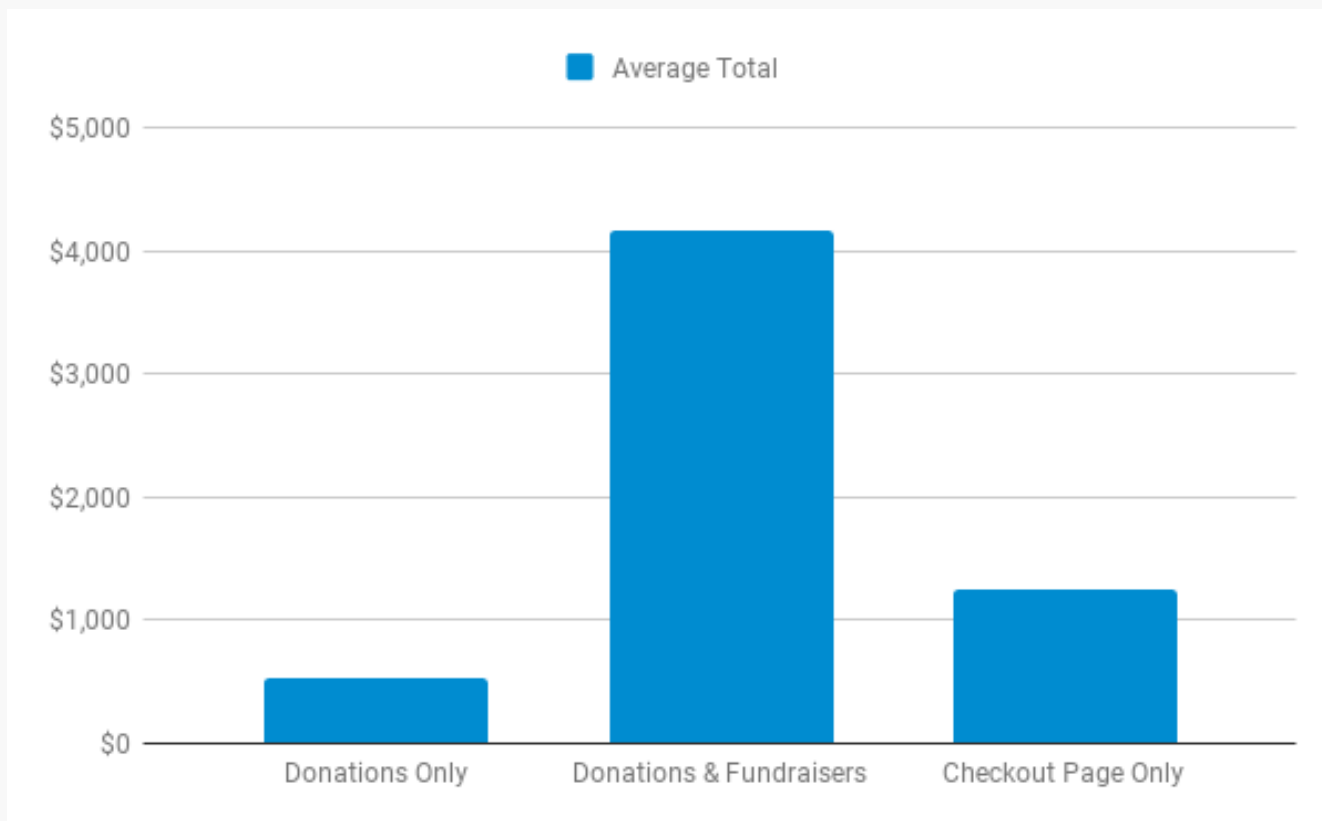
3

Suggest a high donation level (over \$500) to get participants thinking big. If you don't ask, you'll never get it!

4.2 donations vs. fundraising

There are 3 major ways to get donations - simple donations (with or without recommended donation levels), fundraisers, or by having a “donate” checkbox with a specified amount (\$1, \$5, etc.) on the checkout

page. Across 9,874 races that had one of those options available, the results show that races with fundraisers raise the most money:



donations vs. fundraising 4.2

	AVERAGE TOTAL	NUMBER OF RACES	NUMBER OF DONATIONS PER RACE	% OF ALL TRANSACTIONS (INCLUDING REGISTRATIONS)
Donations Only	\$527	7,643	22	3.5%
Donations & Fundraisers	\$4,156	1,754	77	6.3%
Checkout Page Only	\$1,244	477	81	0.5%

takeaways

1

If you have an engaged community, turn on Fundraisers to enable them to help you raise money.

2

Use incentives to encourage participants to become fundraisers, and motivate them to seek out donations. Incentives can be monetary (either a reduced registration fee or a refund when a fundraising threshold is reached) or simply motivational like fundraising goal tracking and fundraising milestone badges.

3

Add the checkbox for a donation to a charity even if you have main donations turned on.

RaceDay

1

KEY FINDINGS AND TRENDS

- In the first full year of the SignUp App, **40% of RaceDay registrations came through the App**; however, only 14% of those registrations took advantage of the RunSignUp credit card swiper.
- The 518,937 photos uploaded to the RunSignUp photo platform over an 8 month period received 3,188,992 pageviews - **that's 6 pageviews for every photo uploaded.**
- Usage of **the RaceJoy GPS tracking app grew 58% from 2016 to 2017**, with 73,040 participants and 118,692 spectators utilizing the technology in 2017.

2

CONCLUSIONS

- As more participants look to register on RaceDay, race directors are exploring technology to make the registration process faster and more efficient.
- Photos are a major draw of traffic to a Race Website and provide an opportunity for monetization - even if the photos themselves are free.
- Races that have groups and teams, even if there are no incentives attached to joining, add a social element that many participants seek when registering for events.

3

RECOMMENDATIONS

- Take the efficiency of RaceDay SignUp a step further by utilizing a RunSignUp credit card swiper to eliminate cash and add a level of security for participants paying by card.
- Use sponsor logo watermarks on your RaceDay photos as a selling point for sponsors, providing them a high visibility option for them while providing additional value to your participants, as well.
- Implement runner tracking, and provide ample training for participants and spectators to ensure that they are maximizing the benefits.

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. In late 2016, we released a RaceDay SignUp App specifically designed to speed the process of RaceDay registration with efficient design and a card swiper capability. In the first year of the SignUp App, 40% of RaceDay registrations came through the App. However, only 14% of the registrations on the SignUp App took advantage of the card swiper.

Here are the totals for RaceDay Registrations:

Total RaceDay Registrations	85,064
Number of App SignUps	33,613
Number using card swiper	4,360

takeaways

1

If you don't have RaceDay Registration, you're missing out on eager participants. Rather than fight the trend, integrate technology to make the RaceDay registration process faster and more efficient.

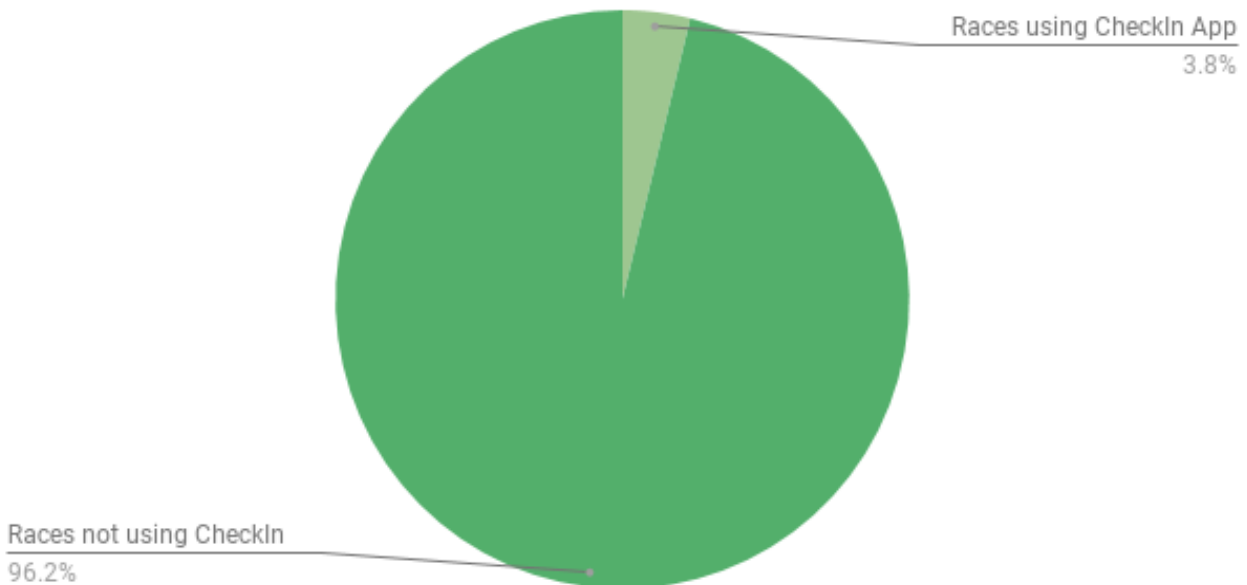
2

Invest in card swipe technology to speed transactions on RaceDay morning and increase the security of your fee collection.

5.2 checkin app usage

As with RaceDay registration, there are multiple methods for checking runners in on RaceDay: on paper, online, or using an online/offline CheckIn App. This year, only 3.8% of races took advantage of the the RaceDay CheckIn App, but those 1,429 races checked in 13% of all registered runners. This suggests that larger races are more likely to take advantage of the App.

Percent of total races that checked runners in via the CheckIn App



“

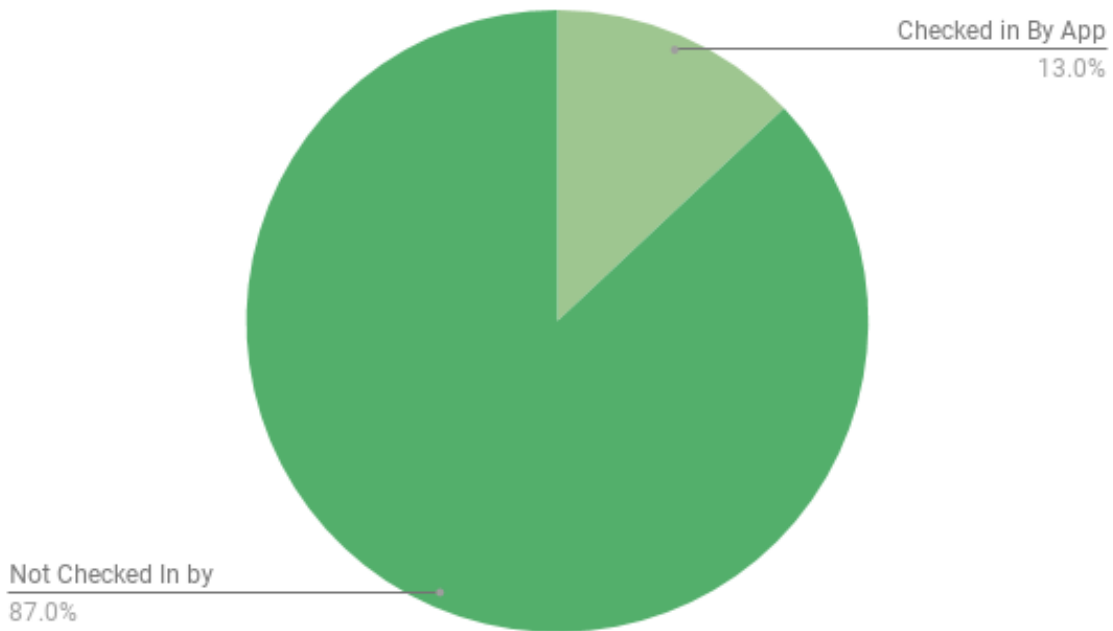
Using a CheckIn App has sped things up quite a bit for us. We rarely have lines at packet pickup now; our volunteers at packet pickup love it, and the ability to see how many people have checked in at any given time – even if I’m not at packet pickup – helps me out as a race owner.

Crisp McDonald, GO Race Productions

”

checkin app usage 5.2

Percent of total runners checked in via the CheckIn App.



takeaways

1

Mirror the big race players with easy RaceDay technology like a CheckIn App.

5.3 TXT results notifications

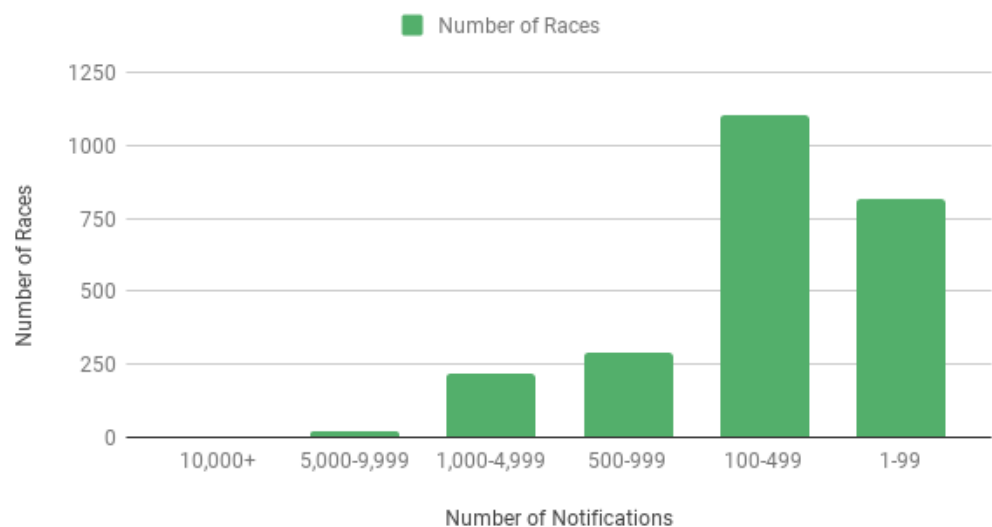
The industry has changed since the days of waiting for the next day's local paper to see your results. Today, runners are accustomed to instant results, at their fingertips. In 2017, we saw 2,459 races use our TXT results notifications, sending

a total of 1,130,396 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 12% of races on RunSignUp took advantage of free TXT notifications.

Seventy-eight percent 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



takeaways

1

RaceDay technology isn't just for the big guys - small and medium races are also providing fast results with notifications.

2

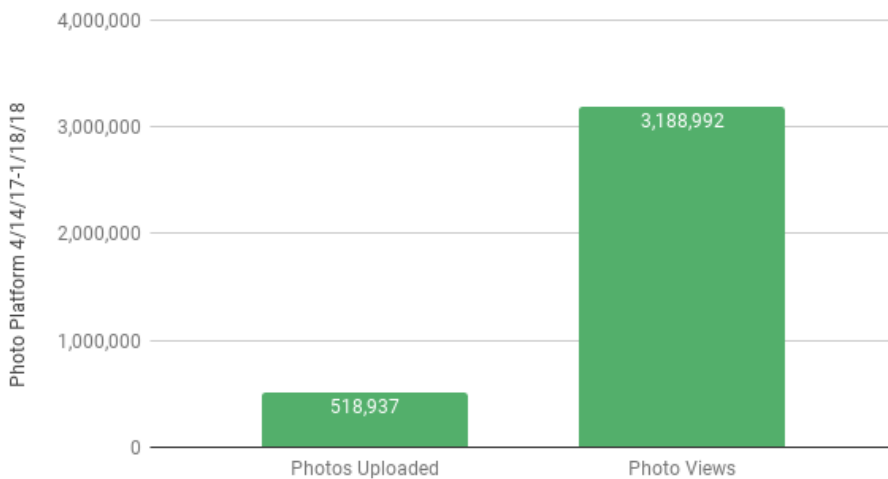
There are multiple ways to interact live on RaceDay, beyond just traditional TXT notifications. Consider a live leaderboard on-site or RaceJoy's GPS tracking notifications.

RaceDay Photos 5.4

The importance of a great RaceDay experience is widely accepted, but an experience is nearly impossible to define. The elements that make up an experience are varied, but there's one thing we know for sure: everyone likes to reminisce about their day via amazing photos. We have started to track the photos that are posted and viewed on our RaceDay Photo Platform to get a better picture of runner's interactions around photos. The data on this one isn't perfect (yet) - currently, we can only pull photo views for the range of 4/14/17-1/18/18, so this

data set does not follow the same date range as the other data sets in this report and represents ~8 months.

Photo Platform 4/14/17-1/18/18



Seventy-eight percent of races that sent notifications sent fewer than 500, indicating that small to medium races are getting in on the technology game.

takeaways

1

Photos equate to pageviews. Take advantage of those views by including a sponsor logo as a watermark on your photos, providing an extra value you can use to secure a sponsor.

2

Photos are a chance to extend RaceDay memories beyond the race course and encourage runners to share the fun with their greater online network. There's no better promotion for your event than the viral sharing of race photos and the subsequent online chatter about the event.

5.5 The Race Director

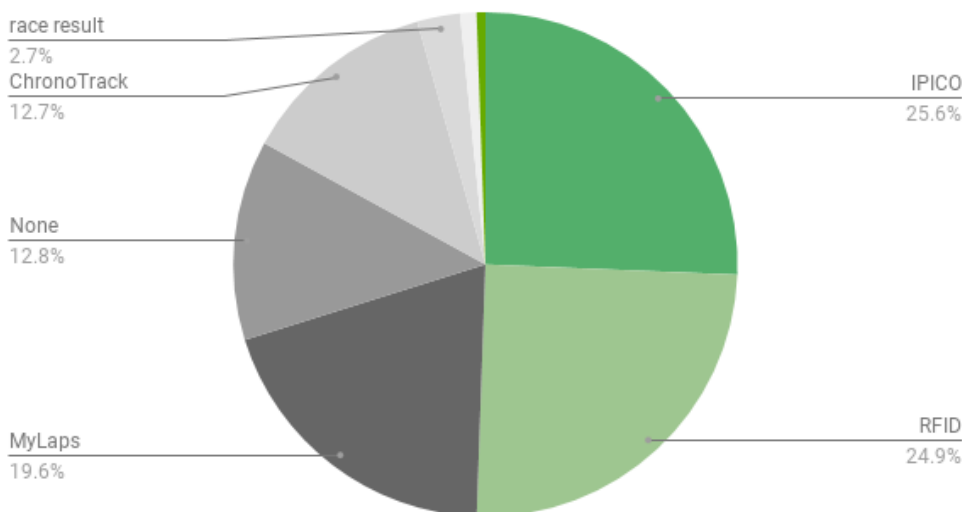
The Race Director is one of the most popular scoring software packages that timers use, with hundreds of timers using it to score over 20,000 races and 8.7 million registrations. Since The Race Director is used more with some timing systems than others (for example a lot of IPICO, RFIS and MYLaps timers 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



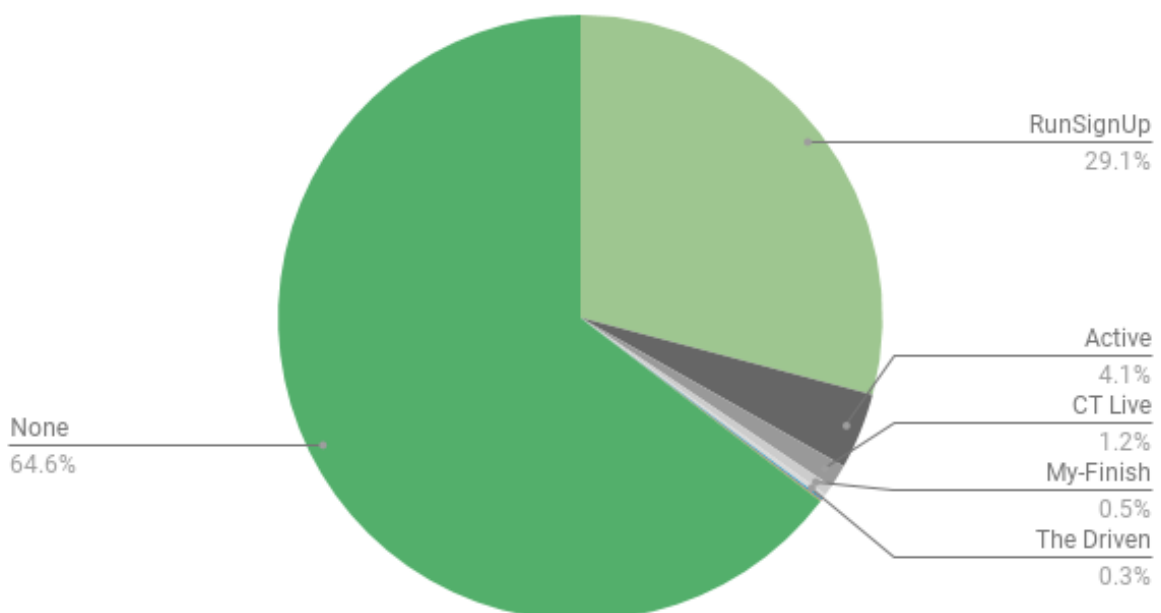
The Race Director 5.5

The full data on Chip Timing Systems:

SYSTEM	# RACES	# PARTICIPANTS
IPICO	5,226	1,934,053
RFID	5,075	2,119,362
MyLaps	3,996	2,107,220
None	2,614	639,330
ChronoTrack	2,579	1,598,722
race result	560	199,592
Trident	214	63,434
IPICO TUHF	55	27,088
AMB	22	3,539
Winning Time	21	6,871
J-Chip	7	15,322
DAG	7	696
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



The full data
on Registration
Integrations:

REGISTRATION	# RACES	# PARTICIPANTS
RunSignUp	5930	2,260,768
Active	829	463,548
CT Live	254	134,177
My-Finish	108	101,137
The Driven	53	62,732
Race Roster	17	9,422
XACT	10	2,027
SignMeUp	8	3,309
IM Athlete	1	140
None	13168	5,677,978

takeaways

1

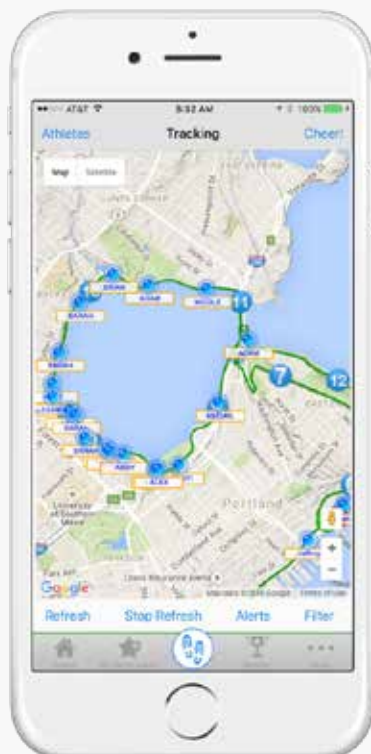
The Race Director is an open platform, working with a variety of hardware options and registration systems. You don't need to pick a complete package - instead, use open solutions that allow you to select the best technology for each component of your event.

RaceJoy GPS Tracking 5.6

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 58% from 2016 to 2017, with an average of 953 users for every race that activated the app. The app impacts race day for

two groups - participants and spectators - and allows for interaction via progress alerts (to either/ both participant and spectator and/or posting to social media) as well as the sending of cheers from spectator to participant.

2017 RACEJOY USAGE	
Races	207
Tracked Participants	73,040
Spectators	118,692
Progress Alerts	2,312,161
Cheers Sent	283,598



The largest single race usage of the app in 2017 was the Philadelphia Marathon, with 10,862 Participants and 18,450 Spectators. Results from that race give an indication of the adoption of RaceDay technology when it is available.

2017 RACEJOY USAGE: PHILADELPHIA MARATHON	
Total Users	18,689
Participants	5,440
Spectators	13,249
# of Phones Tracked	4,190
# of times main RaceJoy race page accessed	217,630
# of GPS Progress Alerts Issued	218,231
# of Cheers	24,383
# of GPS Alerts to Facebook	1,448
# of GPS Alerts to Twitter	448

takeaways

1

When thinking about the RaceDay experience, remember the impact of interaction between spectators and participants, and work to increase the points at which they can interact to improve the experience of both.

2

Don't just *offer* RaceDay technology. As a race, you need to actively share the benefits of the technology. Without widespread adoption, you limit the benefit to your event.

