



RaceTrends

Annual Industry Report 2023





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A Look to Growth

Tens of millions of people participate in endurance events in the United States each year and many more earn their livelihoods from the creation of those events. Despite the scale of the industry, there is no singular aggregator of data for endurance events and insight into the state of the market remains elusive.

We mine RunSignup data annually to generate an overhead view of the endurance market. While specific facets of our technology and business model may impact some results, the large sample size makes it a robust source of information about the state of the industry.

To be transparent we make note of any instance where we believe the particulars of our platform may make our results different from the broader market. With our comprehensive data source – around 40% of the US market – we are able to identify trends and provide recommendations to keep endurance events competitive in a crowded market.

In this report we will quantify and explore:

- **The status of industry recovery from COVID-19**
- **Shifts in event types and participant demographics**
- **Patterns in participant registration**
- **The success of promotional strategies**
- **Trends in event fundraising**
- **Race Day technology and the timing industry**

Throughout this report, our statistics come from RunSignup registration and results data. The sample includes events with more than 2 people registered, including both imported and paid registrations. In order to aggregate the data for publication in early 2024, the dates shown are not a direct calendar year; rather, they cover December 1 (of the prior year) through November 30 of the stated year. Any exceptions in time range are noted.

After a turbulent few years 2023 looks to be a turning point for the industry and an opportunity to shift focus from recovery to growth. While there may be no true “back to normal”, per-race participation and churn rates suggest a return to 2019 enthusiasm levels. With that new baseline, races can redirect focus to the future.

In 2024 we expect an emphasis on marketing and growth. With small and mid-sized races leading the way in participant growth, races should invest heavily in two important (yet different) arenas: community and automation. While connecting with your community through running clubs and local influencers is time-intensive, personal connections break through the noise of traditional advertising. On the flip side, smart automation for everything from email to pricing incentives to photo tagging gives you back some of that time – while maintaining frequent touch points with your runners.

In addition to traditional marketing strategies, creativity is required to reach the most elusive groups: young runners (under 30) and new runners who have not joined races. Successful events will need to be creative and bold in testing new marketing avenues, and races need to focus on inclusivity to attract new runners. To expand your participant pool, create races that embrace social participation, support charities, and offer a range of race distances.

Looking to 2024, we are excited for the possibilities. While industry expansion is difficult, new technologies and a re-invigorated set of race professionals provide hope for an even bigger future.



Data Set

This is the set of data used for the majority of this report. These numbers represent all events and registrations on RunSignup between 2019 and 2023, with a year defined as 12/1 of the previous year through 11/30 of the stated year.

Because the RunSignup platform has increased market share over those five years, growth in this overall data set cannot be taken as an indication of growth across the industry. For a better understanding of per-race participation growth throughout the industry, see section 1.1. These charts should be used simply to better understand the data that was analyzed.

Events on RunSignup

Event Type	2019 # Events	2020# Events	2021 # Events	2022 # Events	2023 # Events
Overall	49,671	46,893	59,885	68,720	75,510
5K and less	27,716	24,407	30,140	35,664	40,105
10K and less	4,671	5,046	6,142	6,777	7,427
Half Marathon and less	2,974	3,572	4,091	4,420	5,024
Marathon and less	1,233	1,640	1,971	2,151	2,279
Ultra	1,073	2,256	2,585	2,572	2,703
Triathlon	1,343	956	1,518	1,823	2,023
Unknown	10,661	9,016	13,438	15,313	15,949

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

calendars, and worldwide endurance industry estimates from RunSignup, we estimate the pre-COVID US market to be in the range of 22-30 million registrations.

Registrations on RunSignup

Event Type	2019 # Registrations	2020 # Registrations	2021 # Registrations	2022 # Registrations	2023 # Registrations
Overall	7,201,237	4,713,380	6,385,666	7,717,532	9,374,018
5K and less	4,580,738	2,677,195	3,810,273	5,103,643	5,817,438
10K and less	912,394	498,424	691,264	1,003,584	1,089,038
Half Marathon and less	873,443	564,017	632,755	848,975	921,360
Marathon and less	82,069	151,629	184,004	242,782	258,281
Ultra	109,810	290,792	259,726	227,236	219,557
Triathlon	106,087	36,554	116,272	145,656	160,006
Unknown	536,696	494,769	691,372	145,656	908,338

Our best estimate is that the 9,374,018 registrants on RunSignup in 2023 represents at approximately 40% of the US race registration market.

“

“We love the tools and resources that RunSignup provides, and the athletes love it too! They all agree that the system is geared towards communicating with them effectively, and is aesthetically pleasing as well. Keep up the great work and we can’t wait to see the newest advances.”

- JASON C,
TCR Event Management



01 The State of the Industry

The State of the Industry



Key Findings and Trends

- The endurance industry has rebounded from COVID-19. Events **grew an average of 9.8% compared to 2022** and per-race **participation trails 2019 levels by just 1%**.
- While small community events thrived in 2023, large-scale events continued to struggle. Races with **fewer than 500 participants grew an average of 13.6% compared to 2019**. On the flip side, **races with more than 5,000 participants were down 15.9%**.
- Most participants do not return to the same event year after year. **Just 16.1% of 2022 participants repeated an event in 2023**. For longer distances, the repeat rate is even lower – only **11.3% of marathon participants registered for the same event** the following year.
- The endurance industry has largely stabilized. **5% of 2022 races with more than 500 participants did not recur in 2023**, on par with pre-pandemic race churn. In 2018 and 2019 the churn rate was 6% and 5.5% respectively.

Conclusions and Recommendations

- It's time to start talking about growth again. Find opportunities to engage new runners through training programs, community partnerships, and walker-friendly time limits.
- Larger races are finding it challenging to re-grow their events. While emulating the personal touch of smaller events may help rebuild enthusiasm, consider adjusting your expectations and budget to the new reality.
- Even the best race retains only a small percentage of participants year over year. Re-engage lapsed participants with loyalty registration programs and flashbacks to previous events while keeping a marketing focus on expanding your reach. Race churn appears to be stable. Opportunities to add new races may be limited, but keep an eye out for the gaps left by the 5% of races that have died.

1.1 Participation Rates

2023 Compared to 2022

Up first for the annual analysis is comparing the total participants for events hosted on our platform in both 2022 and 2023 to determine per-race participation growth. Across all distances, participation grew 9.8% from 2022 to 2023.

Growth is the least pronounced for ultramarathons, where declining interest in virtual challenges (often classified as ultramarathons because they exceed 26.2 miles) may be a factor.



Change in Event Participation 2022 to 2023

Event Type	# Events 2022	# Events 2023	# Participants 2022	# Participants 2023	Growth
Overall	50,734	51,318	5,094,594	5,595,382	9.8%
5K and less	26,263	27,102	3,178,682	3,519,634	10.7%
10K and less	5,158	5,207	631,679	712,304	12.8%
Half Marathon and less	3,591	3,643	565,538	635,182	12.3%
Marathon and less	1,656	1,685	144,370	165,755	14.8%
Ultra	1,925	1,906	120,912	122,608	1.4%
Triathlon	1,509	1,591	106,945	117,923	10.3%
Unknown	10,632	10,184	346,468	321,976	-7.1%

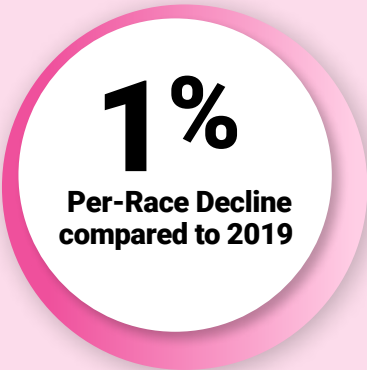
2023 Compared to 2019

Next, we review the per-race growth of 2023 races compared to 2019 races. The chaotic circumstances of 2020 and 2021 has made it useful to view participation through a longer lens. The good news? Since per-race participation was just 1% lower than in 2019, future reports will no longer need to look to 2019 as a benchmark.

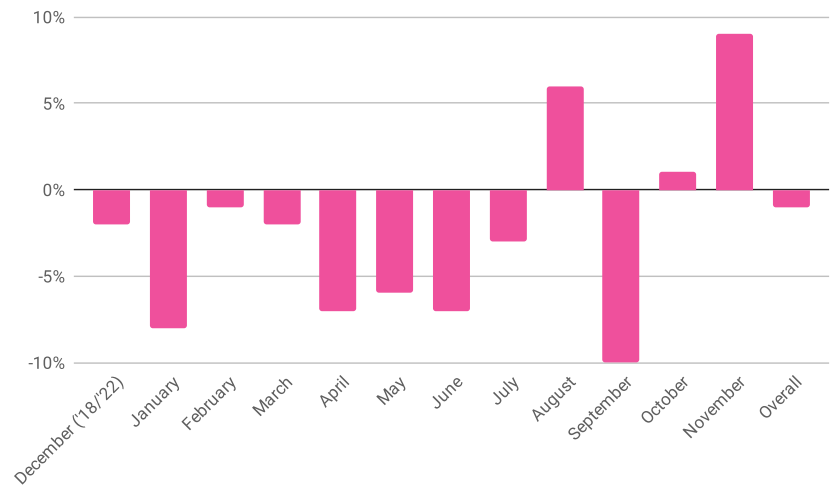
Change In Event Weekend Participation 2019 to 2023

Month	2019 Participants	2023 Participants	% Change
December ('18/'22)	119,166	116,704	-2%
January	86,074	78,870	-8%
February	122,158	120,764	-1%
March	203,758	200,319	-2%
April	318,890	295,707	-7%
May	324,689	305,520	-6%
June	235,063	219,280	-7%
July	227,225	221,157	-3%
August	150,568	159,375	6%
September	290,384	260,092	-10%
October	287,764	291,385	1%
November	687,033	746,290	9%
Overall	3,052,772	3,015,463	-1%

Note that this report differs from the 2022-2023 report in a few ways: First, it's looking at the numbers from an overall event weekend, regardless of the number of distances or options within the event (I.E., the Richmond Marathon with an 8K, half marathon, and full marathon and virtual event is a single event weekend). Second, the matching process on this report is less refined and it may not include events that were on the platform both years but did not use the renewal function. Lastly, the 2022 report by month only includes events in which the 2019 and 2022 version were held in the same month, omitting some events that may have postponed to a different date within the 2022 calendar year.



Per-Race Participation Compared to 2019



Change by Race Size from 2019 to 2023

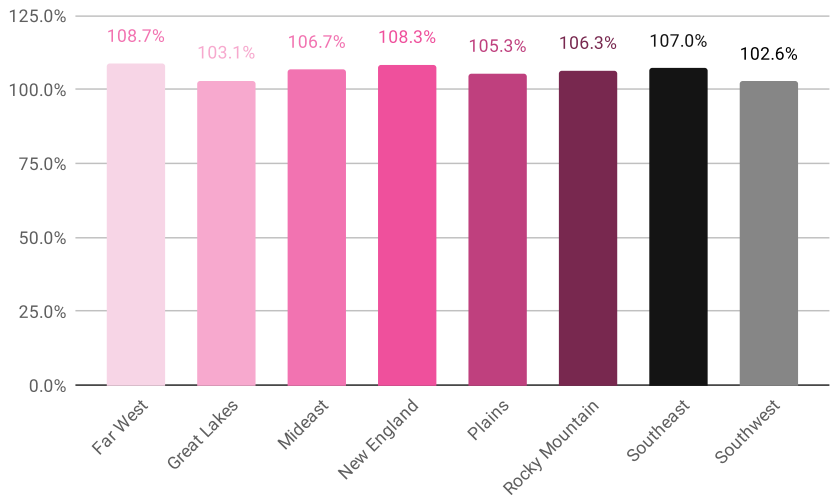
Despite significant good news in the participation data, the largest races still struggled to reach prior numbers in 2023. While small races grew 13.6% over the last year, mid-sized races (501-5,000 participants) still lagged 5-7% behind their 2019 numbers and large races (over 5,000) remained 15.9% down.

While it's impossible to pinpoint a single reason that large races continue to show the impact of the pandemic, we can identify a few likely contributors. These include: increasing travel costs, interrupted participant traditions, and challenges for large race teams that have not fully re-staffed after pandemic layoffs.

Race Size (in 2019)	2019 Participants	2023 Participants	% Change
Under 500	1,015,080	1,152,877	13.6%
501-1,000	688,120	653,111	-5.1%
1,001-5,000	1,317,306	1,224,283	-7.1%
5,000+	542,282	456,059	-15.9%

Regional Changes to Per Race Participation

While there may be hyper-local variation, the uptick in participation was seen relatively consistently across the country. Every region saw growth of 3-9% from 2022 to 2023.



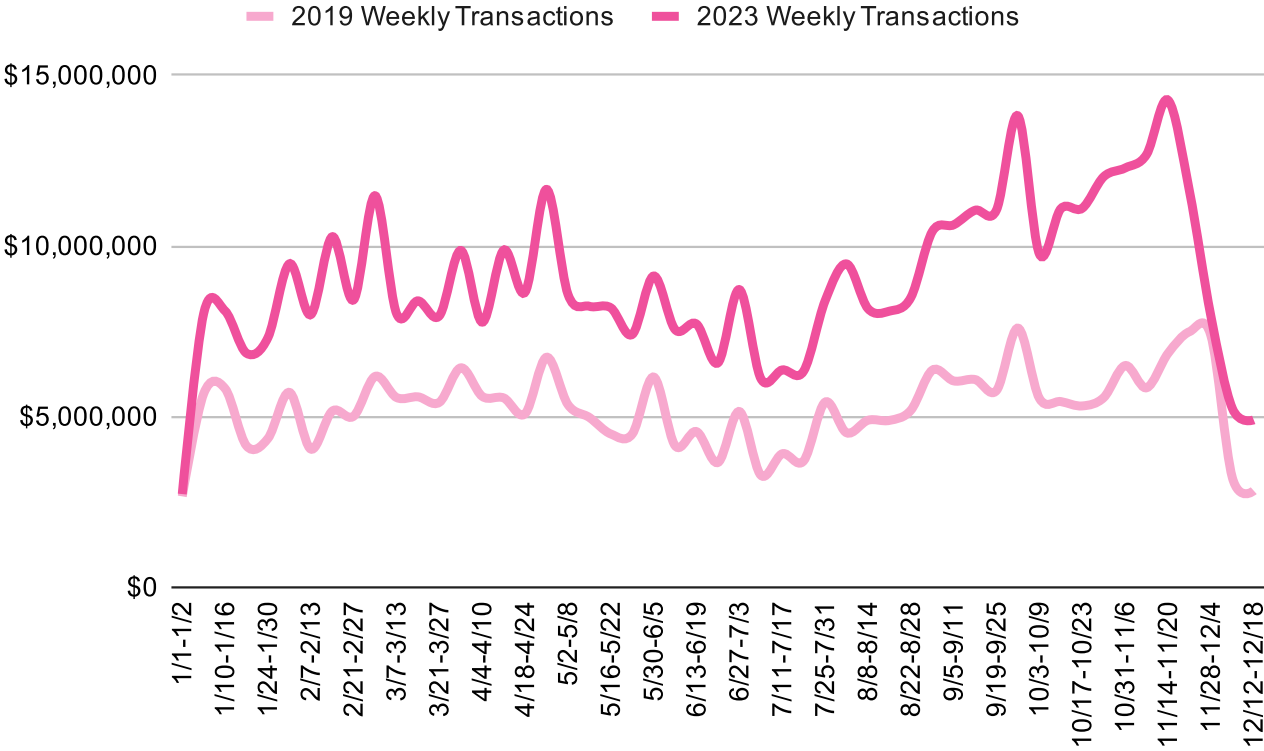
Regions as defined by the Bureau of Economic Analysis
Far West: AK, CA, HI, NV, OR, WA
Great Lakes: IL, IN, MI, OH, WI
Midwest: DE, DC, MD, NJ, NY, PA
New England: CT, ME, MA, NH, RI, VT
Plains: IA, KS, MN, MO, NE, ND, SD
Rocky Mountains: CO, ID, MT, UT, WY
Southeast: AL, AR, FL, GA, KY, LA, MS, NC, SC, TN, VA, WV
Southwest: AZ, NM, OK, TX

Transactions on the Platform

The final data that we reviewed for this section is our internal weekly transaction report. This report is impacted by new events and increased market share of the RunSignup platform and does not reflect the experience of an individual race director.

However, it provides a clear visual of the **patterns** of registration. From this, it's easy to see that the industry spikes and valleys look much like they did pre-pandemic.

Weekly Transactions 2019 to 2023



Takeaways

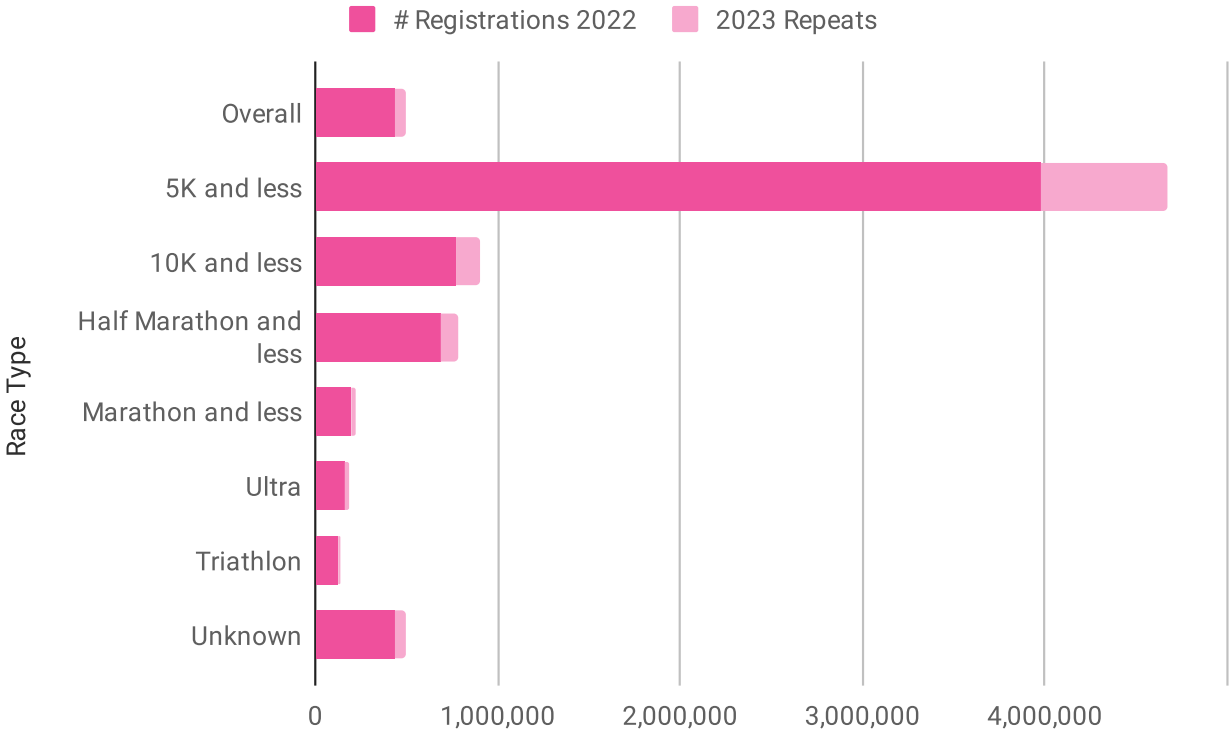
- We no longer need to look to 2019 as the benchmark for the entire endurance industry – in 2023, per-race participation varied only slightly from 2019. In 2024, it's time to turn attention from recovery to growth.
- While small events are flourishing and mid-sized events are hanging on, the largest events continue to struggle to regain previous participation levels. In addition to promoting longer and further, focus on your local community to bypass concerns about travel and cost. Re-engage your core runners with loyalty programs, referral rewards, and community outreach.

1.2 Repeat Participation

This metric looks at how many of your participants from 2022 returned to your event this year. As the industry has stabilized with less flip-flopping between in-person and virtual events, repeat participation has improved, with 16% of 2022 participants returning to the same event in 2023.



Percentage of 2022 Registrants who Repeated in 2023

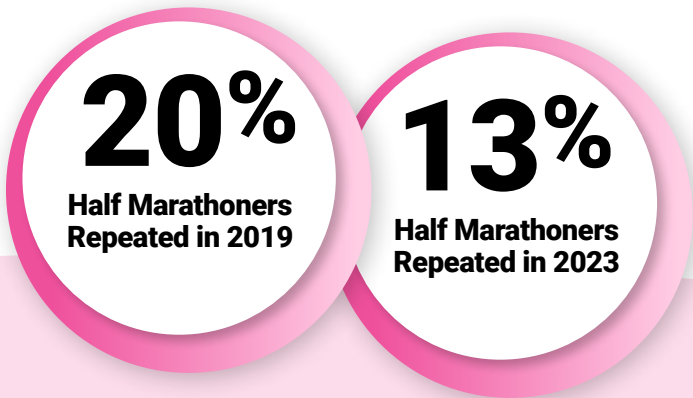


Repeat participation in 2023 increased across all distances, with 10K participants the most likely to re-join the same event the following year. In general, shorter events like 10K's and 5K's are the most likely to draw repeat participants. On the other hand, triathlon and ultramarathon participants are the least likely to repeat, likely due the commitment and training required.

While repeat participation is becoming more common again, events still are not drawing repeat participants at the rate they did before the pandemic. Half marathons, in particular, have seen a decline in repeat participation.

Repeat Participation by Year

Event Type	Repeat % 2019	Repeat % 2020	Repeat % 2021	Repeat % 2022	Repeat % 2023
Overall	18.4%	10.1%	12.0%	14.1%	16.1%
5K and less	18.4%	9.9%	12.7%	15.7%	17.3%
10K and less	21.7%	11.9%	13.1%	15.2%	18.2%
Half Marathon and less	19.7%	11.5%	11.0%	10.0%	12.6%
Marathon and less	14.4%	7.2%	9.5%	10.2%	11.3%
Ultra	13.9%	8.1%	6.6%	9.5%	10.1%
Triathlon	8.0%	4.4%	7.9%	6.3%	8.5%
Unknown	13.1%	7.8%	11.5%	12.2%	13.7%



Takeaways

- Retaining participants is not a given. Implement dedicated retention efforts like loyalty programs to incentivize previous participants to return. Nothing sparks action like being treated as a VIP.
- FOMO is powerful. Use images and stories from previous years in your email and social communications to remind lapsed participants of the joy of race day.
- Regardless of participant retention, every race needs to reach new runners each year. Add beginner-friendly distances, offer training programs for new runners, and encourage social teams to help ease new runners into your races – and ensure a positive experience that will bring them back again.

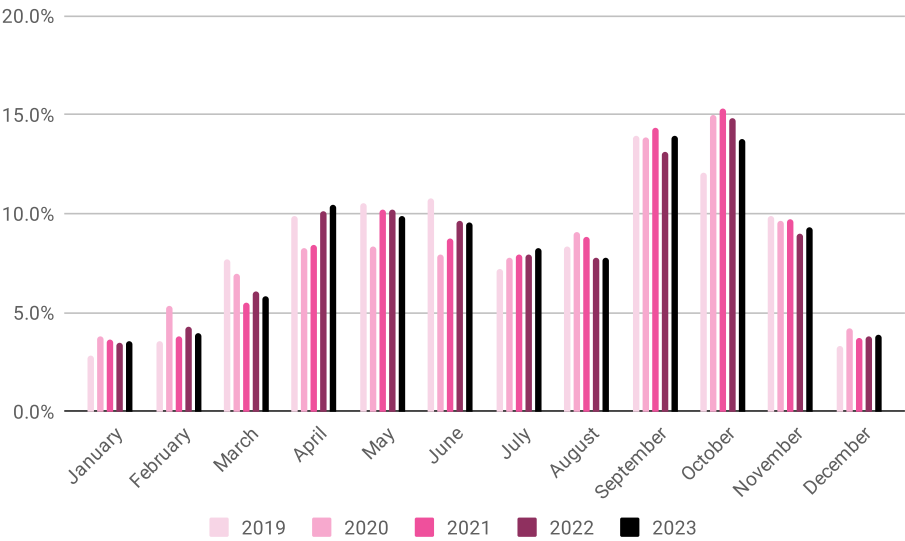
1.3 Distribution of Events

There was a normalization of monthly event distribution in 2023 after years of artificial shifts caused by COVID-19 postponements. For each of the previous years, a COVID surge in the winter/spring led to additional races in the already-crowded fall months; this year, September/October races fell closer to pre-pandemic levels.

The main patterns have remained steady, however. October, September, April, and May are the most popular months for racing, with 48% of all races taking place during those four months. November, and its ever-increasing number of Turkey Trots, hosts an additional 9% of races.

Events by Month

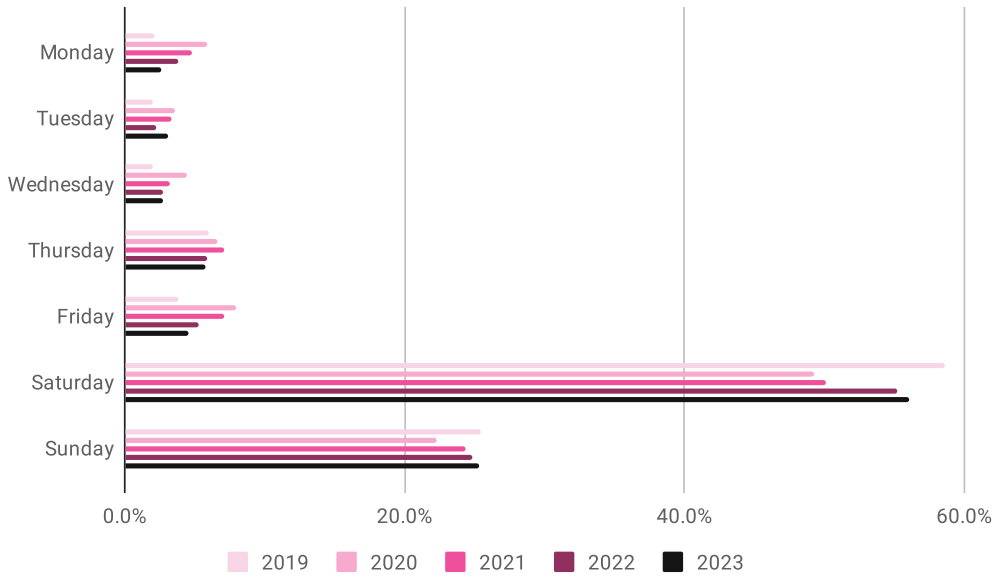
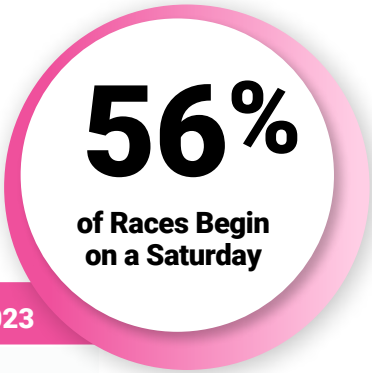
Month	2019 % of Total	2020 % of Total	2021 % of Total	2022 % of Total	2023 % of Total
January	2.8%	3.8%	3.6%	3.5%	3.5%
February	3.6%	5.3%	3.8%	4.3%	4.0%
March	7.7%	6.9%	5.5%	6.1%	5.8%
April	9.9%	8.3%	8.4%	10.1%	10.4%
May	10.6%	8.4%	10.2%	10.2%	9.9%
June	10.7%	7.9%	8.7%	9.6%	9.6%
July	7.2%	7.7%	7.9%	7.9%	8.2%
August	8.3%	9.0%	8.8%	7.7%	7.8%
September	13.9%	13.8%	14.3%	13.1%	13.9%
October	12.0%	15.0%	15.3%	14.8%	13.7%
November	9.9%	9.6%	9.7%	9.0%	9.3%
December	3.3%	4.2%	3.7%	3.8%	3.9%



Unsurprisingly, weekends dominate the racing scene. While the preponderance of virtual races led to a slight uptick of weekday races in 2020 and 2021, the 2023 weekly patterns closely resemble those of 2019. Saturdays lead the way with 56% of races while Sundays offer 25% of all races.

Events by Day of the Week

Day	2019	2020	2021	2022	2023
Monday	2.1%	5.8%	4.8%	3.8%	2.6%
Tuesday	2.0%	3.5%	3.3%	2.3%	3.1%
Wednesday	1.9%	4.4%	3.2%	2.8%	2.7%
Thursday	6.0%	6.6%	7.0%	5.9%	5.7%
Friday	3.8%	8.0%	7.1%	5.2%	4.5%
Saturday	58.6%	49.3%	50.1%	55.2%	56.1%
Sunday	25.4%	22.3%	24.4%	24.8%	25.3%



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

Takeaways

- Take advantage of the racing downtimes. Take advantage of the lack of competition in the summer and winter with fun races that play into the adverse conditions through fun themes, unique courses, and bragging rights.
- Weekends are popular race days for a reason, but running can be an everyday sport. Look for opportunities to engage your community during the week through fun runs and low-frills races. Building grassroots love for your events can make a big difference with registration opens for your premier races!

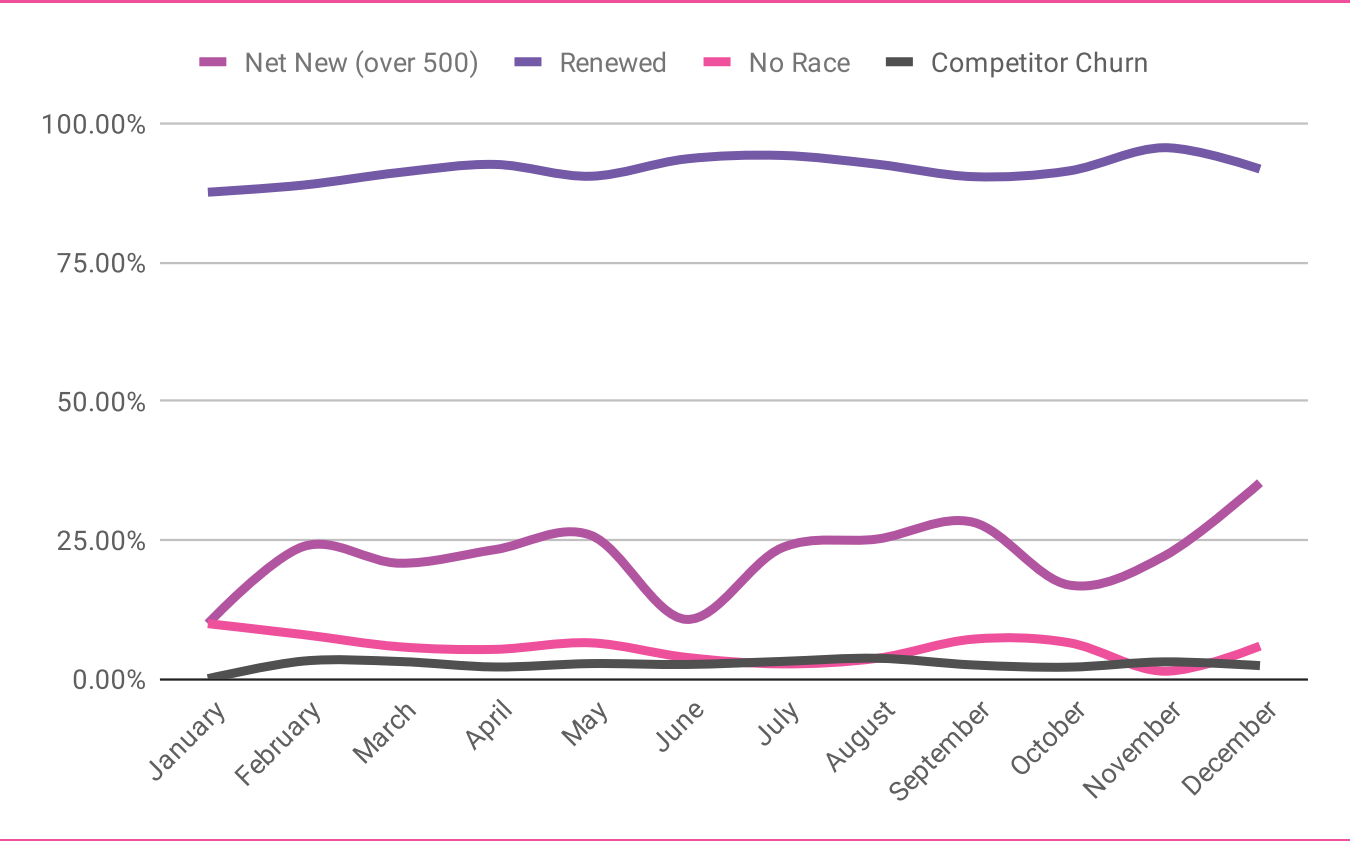
1.4 Churn

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

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

Note: This report is based on a calendar year (January -> December) instead of the offset year (December -> November) represented in most of our reports.

Competitor and No Race Churn 2022-2023 Compared to Race Renewals and New Races

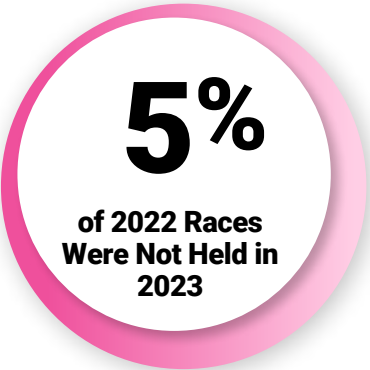


Churn 2022-2023

	Total Events Over 500 In 2022	Total Events Over 500 in 2023	Net New Events 2023	Renewed (Same Month)	Renewed (New Month)	Competi- tor Churn	No Race Churn	Competi- tor Churn %	No Race Churn %
January	121	118	12	95	11	0	12	0.0%	9.9%
February	126	142	30	106	6	4	10	3.2%	7.9%
March	226	253	47	186	20	7	13	3.1%	5.8%
April	284	329	66	226	37	6	15	2.1%	5.3%
May	294	342	76	239	27	8	19	2.7%	6.5%
June	234	244	25	188	31	6	9	2.6%	3.8%
July	225	265	153	199	13	7	6	3.1%	2.7%
August	163	192	41	137	14	6	6	3.7%	3.7%
September	323	383	91	270	22	8	23	2.5%	7.1%
October	385	417	65	290	62	8	25	2.1%	6.5%
November	593	698	131	556	11	18	8	3.0%	1.3%
December	170	216	60	152	4	4	10	2.4%	5.9%
Total	3,144	3,599	797	2544	258	82	156	2.6%	5.0%

The overall churn rate for 2022 events that did not recur in 2023 was 5%. That churn rate is very consistent with pre-pandemic churn rates. For example, the churn rate was 6% in 2018 and 5.6% in 2019. This suggests a relatively healthy market, with a small percentage of races disappearing each year and new events taking their place.

One other key insight from this year’s churn report is the normalization of race patterns. In particular, a large number of races from October 2022 (65) occurred in a different month in 2023, likely returning to their original time frame after pandemic-related postponements.



Competitor Churn

Competitor churn has remained low over the last four years. The biggest drivers of competitor churn have come from a race series that acquired a company with their own registration platform, changes in partnerships and strategy for timing companies, and potentially unsustainable sales strategies with aggressive financial incentives. Regardless, new races on the platform continue to out-pace both competitors and no race churn.

Competitor Churn 2019-2023

Percent is percentage of total churn (not percentage of total events)

Competitor Losses	2019	2019 %	2020	2020 %	2021	2021 %	2022	2022 %	2023	2023 %
New Events	834		1,027		1,320		1,652		889	
EnMotive	3	0.2%	38	2.6%	27	4.4%	0	0.0%	5	0.3%
Race Roster	16	0.8%	8	0.6%	9	1.5%	8	0.4%	29	1.5%
ItsYourRace	3	0.2%	1	0.1%	2	0.3%	0	0.0%	1	0.1%
Active	2	0.1%	6	0.4%	2	0.3%	2	0.1%	5	0.3%
CT/Athlinks	1	0.1%	1	0.1%	2	0.3%	1	0.1%	26	1.4%
Events.com	3	0.2%	2	0.1%	3	0.5%	0	0.0%	0	0.0%
Showclix	8	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
RaceWire	1	0.1%	0	0.0%	1	0.2%	0	0.0%	1	0.1%
onecause	6	0.3%	0	0.0%	0	0.0%	0	0.0%	1	0.1%
Custom	0	0.0%	5	0.3%	0	0.0%	0	0.0%	0	0.0%
EventBrite	0	0.0%	3	0.2%	1	0.2%	0	0.0%	0	0.0%
RedPodium	0	0.0%	2	0.1%	1	0.2%	0	0.0%	1	0.1%
BlackBaud	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
elitefeats	2	0.1%	2	0.1%	0	0.0%	0	0.0%	1	0.1%
Race Entry	0	0.0%	1	0.1%	1	0.2%	0	0.0%	1	0.1%
Vertical Runner	2	0.1%	0	0.0%	1	0.2%	0	0.0%	0	0.0%
Classy	0	0.0%	1	0.1%	0	0.0%	0	0.0%	1	0.1%
GetMeRegistered	0	0.0%	2	0.1%	0	0.0%	1	0.1%	0	0.0%
Haku	0	0.0%	0	0.0%	1	0.2%	0	0.0%	1	0.1%
Lightbox Registrations	1	0.1%	0	0.0%	1	0.2%	0	0.0%	0	0.0%
Qgiv.com	0	0.0%	1	0.1%	2	0.3%	0	0.0%	0	0.0%
RacesOnline	1	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Other	8	0.4%	8	0.6%	25	4.1%	8	0.4%	3	0.1%

Takeaways

- Race churn has stabilized, but there will always be some races that do not recur. Keep an eye out for turnover – new gaps in the race calendar mean new opportunities for race directors.
- After several turbulent years events that were postponed between 2020-2022 appear to have reverted to their original timeline. Take advantage of the more reliable race calendar to create a long-term marketing plan with time for multiple calls to action before race day.

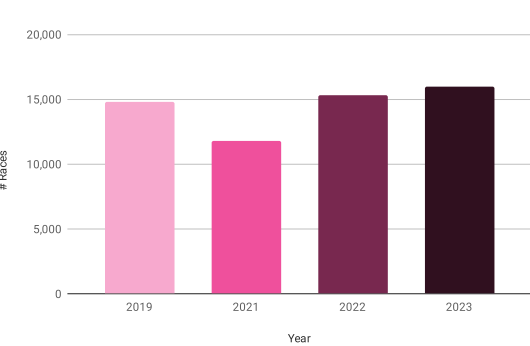
1.5 Timing Industry

As the backbone of the endurance industry, timer insights can shed some light on the state of the overall industry. This looks at scoring software data from three major scoring software platforms to draw a few conclusions.

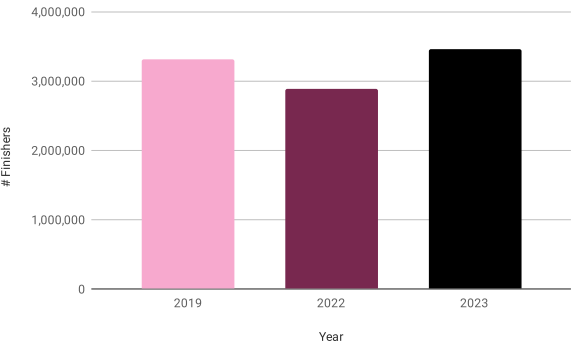
Timed Events in 2023

We started with aggregate data from The Race Director and the next-generation software RaceDay Scoring. This shows growth in both the number of races timed and the total finishers scored. While it's possible some increase is due to new timers moving to RaceDay Scoring, it's an encouraging sign that timing companies are back to full capacity

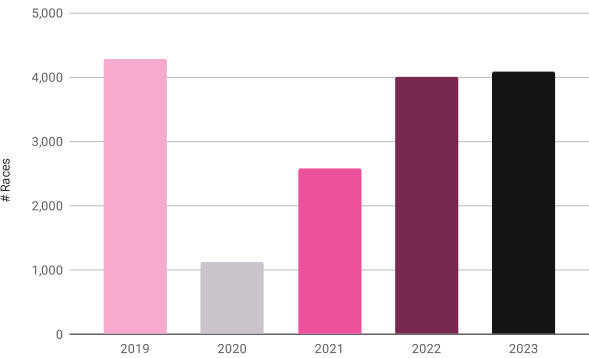
RaceDay Scoring and Race Director
Timed Races



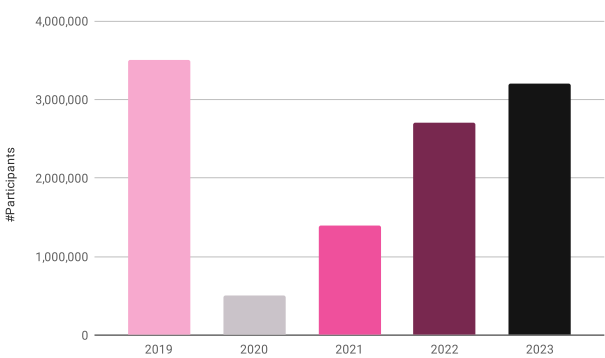
Finishers Scored By RaceDay Scoring
or The Race Director



RunScore Timed Races



Participants in RunScore Races



Race and participant data from RunScore is similarly positive. While both fall just shy of 2019 numbers, the 2023 data surpasses 2022.

Takeaway

- The timing industry has rebounded and the demand for scoring is high. To stay competitive in 2024, timers should be proactive with clients, providing education and guidance for the whole race cycle.

“

Having all the data electronic makes it easy for us, having all that info combined in one place and reducing errors of a paper-based check-in process. It is a thing of beauty to have so many of the logistics of the race in one place; data stays accurate and up to date, it is integrated across various services and tools, and it makes the job of race directing a lot easier.”

- LUKE N,
Scout Mountain Ultras Race Director



02 Event Trends



Event Trends

Key Findings and Trends

- In-person events continue to dominate the market with **90.9% of events and 95.7% of participants coming from in-person events**. Regardless, the rate of virtual participation continues to outpace pre-pandemic levels – in 2023, 4.7% of participants were virtual compared to just 1% in 2019.
- While the **majority of 2023 participants identified as female (53.4%)**, the gap between female and male participation is closing. In virtual races the difference is much more pronounced with **65.2% of virtual race participants identifying as female**.
- There's reason for cautious optimism that young adults are beginning to return to racing. **14.8% of 2023 participants were between 18-29**, the highest percentage since 2019. However, with participation that still lags behind pre-pandemic levels, there is still work to be done by the industry.
- Major marathons and marquee large events get most of the media attention, but they don't tell the whole story. **The vast majority of events (95.4%) have fewer than 500 participants and only 11.7% of participation takes place at events with more than 5,000 participants.**

Conclusions and Recommendations

- In-person race experiences should be your priority. Use virtual options to keep previous participants engaged if they have to miss race day and to boost registration on the margins. But be cautious: with limited opportunity, keep your overhead low.
- The gender gap in participation is shrinking, but female participants still lead the way. Make sure you include them in every marketing pitch and provide merch that aligns with their style and fit preferences.
- It's encouraging that young adult participation is rising, but the industry is still figuring out how to effectively reach and market to younger runners. Don't be afraid to experiment with new marketing platforms and focus on event elements that are proven to draw young Millennials and Gen Z: charity support and social experiences.
- Large, premier, events are only one small part of the endurance industry and most runners experience small to mid-sized races, not mega-events. Focus on races that look like yours when making predictions about participation and decisions about financial viability.

2.1 Participation by Event Type

While virtual options remain more common than pre-COVID, they are increasingly less common. In general, there are two buckets of remaining virtual events:

- Niche virtual-only events with popular themes, premium swag, and significant digital marketing.
- Low key virtual options connected to in-person events to encourage maximum participation (from anywhere).

Percent of Events by Type

Event Type	2019 % of Events	2020 % of Events	2021% of Events	2022 % of Events	2023 % of Events
In-Person	97.2%	59.8%	74.8%	87.6%	90.9%
Virtual Race	2.8%	33.9%	20.3%	10.5%	7.9%
Virtual Challenge		6.3%	4.9%	1.9%	1.3%

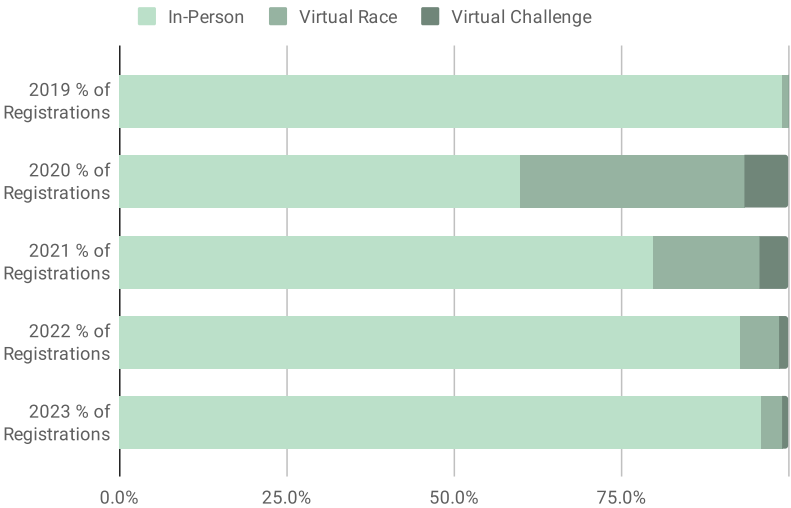
9.2% of 2023 Events Were Virtual (Or Challenges)
2.8% of 2019 Events Were Virtual

Registrations by Event Type

Event Type	2019 % of Registrations	2020 % of Registrations	2021 % of Registrations	2022 % of Registrations	2023 % of Registrations
In-Person	99.0%	59.8%	79.6%	92.8%	95.7%
Virtual Event	1.0%	33.4%	15.9%	5.7%	3.2%
Virtual Challenge		6.7%	4.5%	1.5%	1.0%

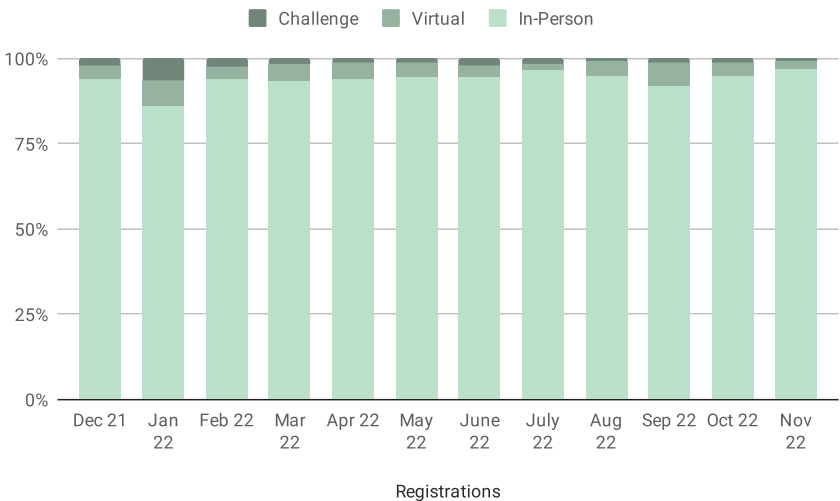
Interest in virtual participation also continues to drop off. However, there does appear to be continued normalization of virtual as an option, with more virtual registrations in 2023 than prior to the pandemic.

Percent of Registrations by Event Type



Registration Event Type by Month

In the first year without a major COVID disruption, virtual participation was relatively consistent throughout the year. However, virtual does seem to attract a little more interest during the wintery weather of January.



Takeaways

- The demand for virtual events has dropped off significantly. That said, providing a virtual option can still increase your registrations on the margins, but keep it low overhead.
- There is still a niche for virtual-only events, but they need to stand out. If you want to organize a virtual-only event, make sure you're prepared with a unique theme, premium swag, and a personalized experience. Strong digital marketing skills are also required to find the right target audience for your virtual event.

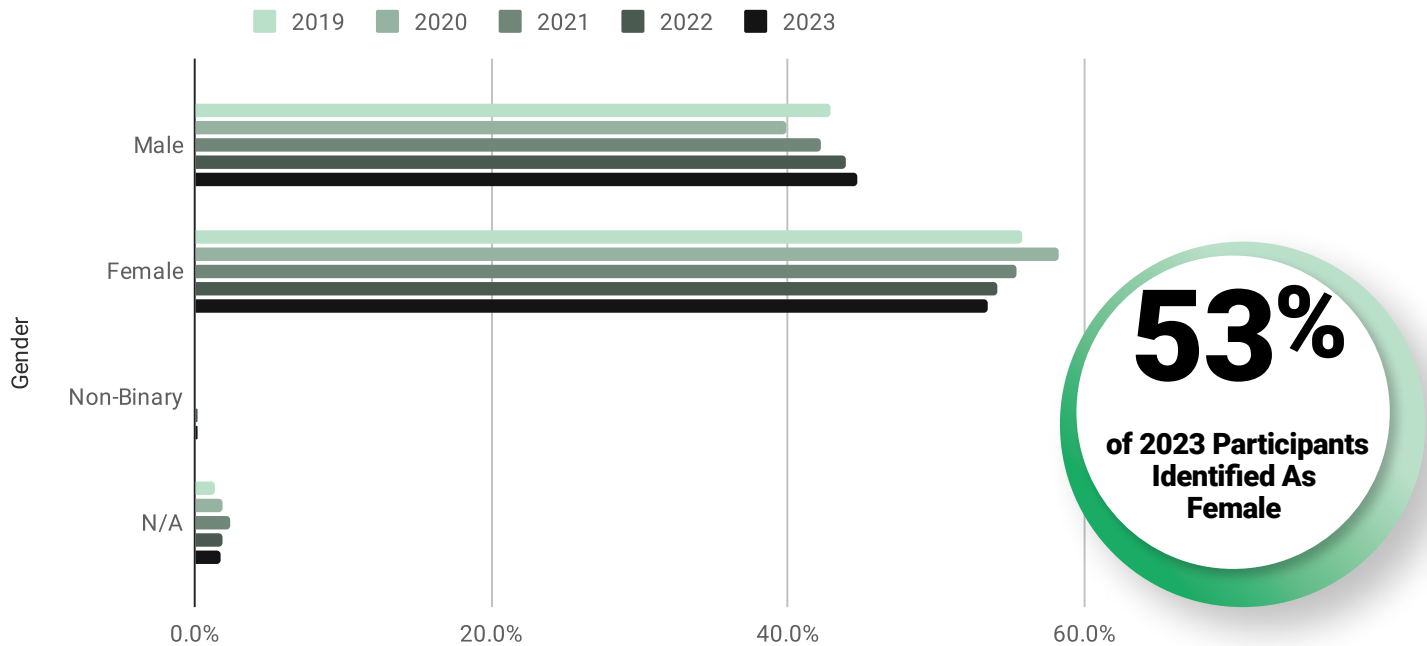
2.2 Participant Demographics

The participant gender breakdown in 2022 looked similar to previous years. While a small majority of participants identify as female, the gap between male and female participants has shrunk slightly, a trend that continued in 2023. Overall, 53.4% of 2023 participants identified as female.

Overall Participation by Gender

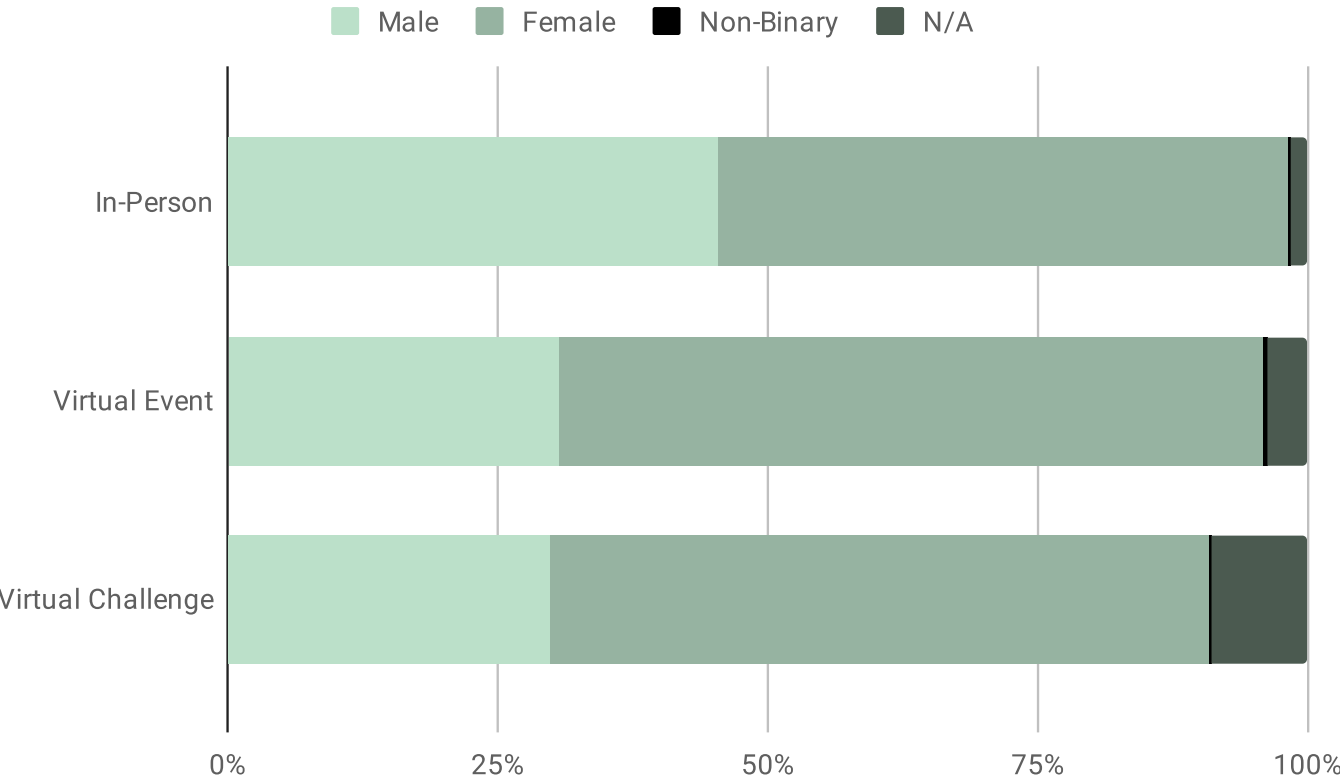
Gender	2019 % of Total	2020 % of Total	2021 % of Total	2022 % of Total	2023 % of total	% Change 2019-2023	% Change 2022-2023
Male	42.8%	39.8%	42.2%	43.9%	44.7%	4.3%	1.8%
Female	55.8%	58.3%	55.4%	54.1%	53.4%	-4.2%	-1.2%
Non-Binary	-	-	-	0.2%	0.2%	-	-1.6%
N/A	1.4%	1.9	2.4	1.9%	1.7%	25.7%	-10.0%

Some fun runs and virtual events don't require a gender field. In 2023 1.7% of registrants did not identify a gender in registration. Additionally, in the first full year since a non-binary category was included in the defaults on RunSignup, 0.2% of participants indicated that they are non-binary. We anticipate the number may grow as more races enable the option.



Gender by Event Type

Gender	2021 Virtual Challenge	2022 Virtual Challenge	2023 Virtual Challenge	2021 Virtual Race	2022 Virtual Race	2023 Virtual Race	2021 In-Person	2022 In-Person	2023 In-Person
Male	29.0%	30.0%	29.9%	30.6%	27.9%	30.7%	45.3%	45.1%	45.3%
Female	63.3%	64.7%	61.0%	65.1%	66.9%	65.2%	53.0%	53.1%	52.9%
Non-Binary		0.1%	0.2%		0.1%	0.3%	-	0.2%	0.2%
N/A	7.7%	5.2%	8.9%	4.3%	5.0%	3.8%	1.7%	1.7%	1.6%



65% of 2023 Virtual Race Participants Identified As Female

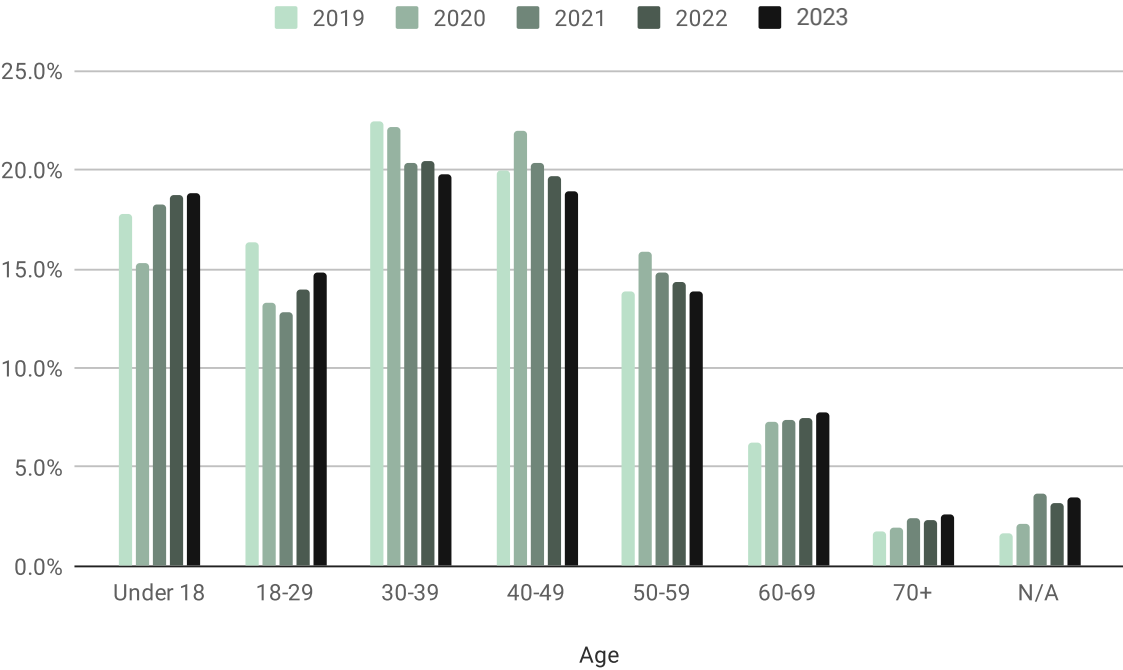
After several years of falling participation from young adults, 2023 provided a little room for cautious optimism. 14.8% of 2023 participants were between 18-29 years old, the second consecutive increase after pandemic lows. Still, the percentage of participants under 30 continues to lag behind rates in the late-2010's, when 18-29 year olds made up 17-22% of all participants.

Overall Participation by Age

Age	2019 % of Total	2020 % of Total	2021 % of Total	2022 % of Total	2023 % of Total	% Change 2019-2023	% Change 2022-2023
Under 18	17.8%	15.3%	18.3%	18.7%	18.8%	5.8%	0.9%
18-29	16.4%	13.3%	12.8%	13.9%	14.8%	-9.3%	6.0%
30-39	22.4%	22.2%	20.3%	20.5%	19.8%	-11.5%	-3.4%
40-49	19.9%	22.0%	20.3%	19.7%	18.9%	-5.4%	-4.2%
50-59	13.9%	15.8%	14.8%	14.3%	13.8%	-0.6%	-3.6%
60-69	6.2%	7.3%	7.4%	7.4%	7.8%	24.8%	4.2%
70+	1.7%	2.0%	2.4%	2.3%	2.6%	49.1%	11.4%
N/A	1.7%	2.1%	3.6%	3.2%	3.5%	109.8%	7.9%

Age also impacts the type of event participants choose. Runners over 50 make up a much larger share of participants at virtual races and challenges than in-person events, while participants under 30 tend to opt-for in-person participation.

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

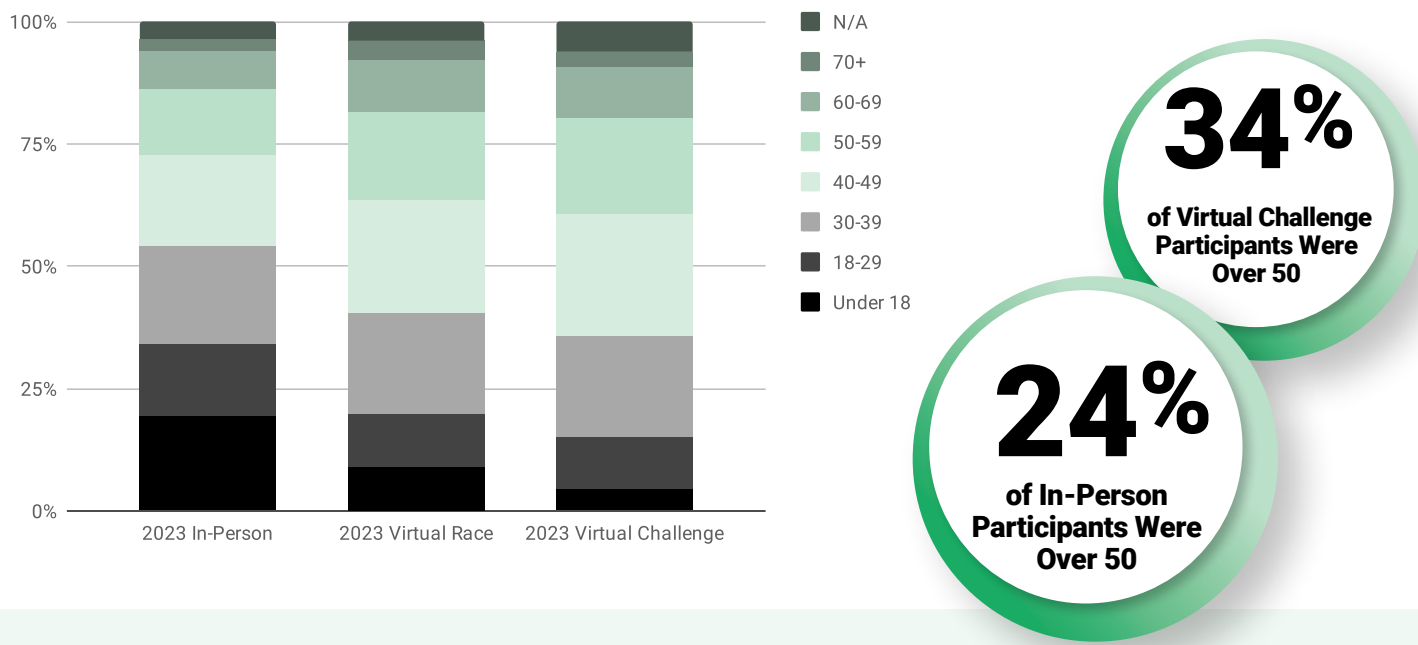


15% of 2023 Participants Were 18-29 While 16% of 2019 Participants Aged 18-29

Age by Event Type

Age	2021 Virtual Challenge	2022 Virtual Challenge	2023 Virtual Challenge	2021 Virtual Race	2022 Virtual Race	2023 Virtual Race	2021 In-Person	2022 In-Person	2023 In-Person
Under 18	8.2%	4.9%	4.5%	10.5%	8.4%	9.0%	20.4%	19.5%	19.3%
18-29	9.5%	9.4%	10.6%	11.6%	10.6%	10.7%	13.2%	14.2%	15.0%
30-39	20.4%	21.2%	20.7%	21.9%	21.5%	20.7%	20.0%	20.4%	19.8%
40-49	24.8%	26.0%	25.0%	23.4%	23.9%	23.2%	19.5%	19.3%	18.7%
50-59	19.2%	20.6%	19.5%	17.3%	18.0%	18.1%	14.1%	14.0%	13.6%
60-69	9.6%	10.5%	10.4%	8.7%	9.1%	10.5%	7.0%	7.3%	7.6%
70+	2.7%	2.9%	3.1%	3.0%	2.9%	3.8%	2.3%	2.3%	2.6%
N/A	5.6%	4.5%	6.2%	3.7%	5.6%	4.0%	3.5%	3.0%	3.4%

2023 Event Participation by Age



Takeaways

- While the gap is closing, the majority of race participants are still female. Offer merch tailored to them and integrate female athletes in your marketing images and messaging.
 - Young adults turned out at a slightly higher rate in 2023, but concerns about their engagement with endurance sports remain. For marketing to younger participants, think beyond email and Facebook. Surveys indicate that both
- generations are socially aware and driven by social interactions; strong charity partnerships and active team programs can motivate younger runners.

 - Build more welcoming events with inclusive gender options, virtual options for those who can't (or won't) attend in person, and beginner-friendly distances.

2.3 Event Size by Type

Though large events tend to get the most media attention, the majority of endurance events in the US are small community affairs. In fact, ninety-five percent of in-person events in 2023 had fewer than 500 participants. Virtual events are typically small, as well. Ninety-five percent of virtual challenges and 98% of virtual events are for fewer than 500 participants.

For this report, we look at each individual event separately (I.E., a 5K and a 10K are two events). A full race weekend may include multiple of the events below.

In-Person Events by Size

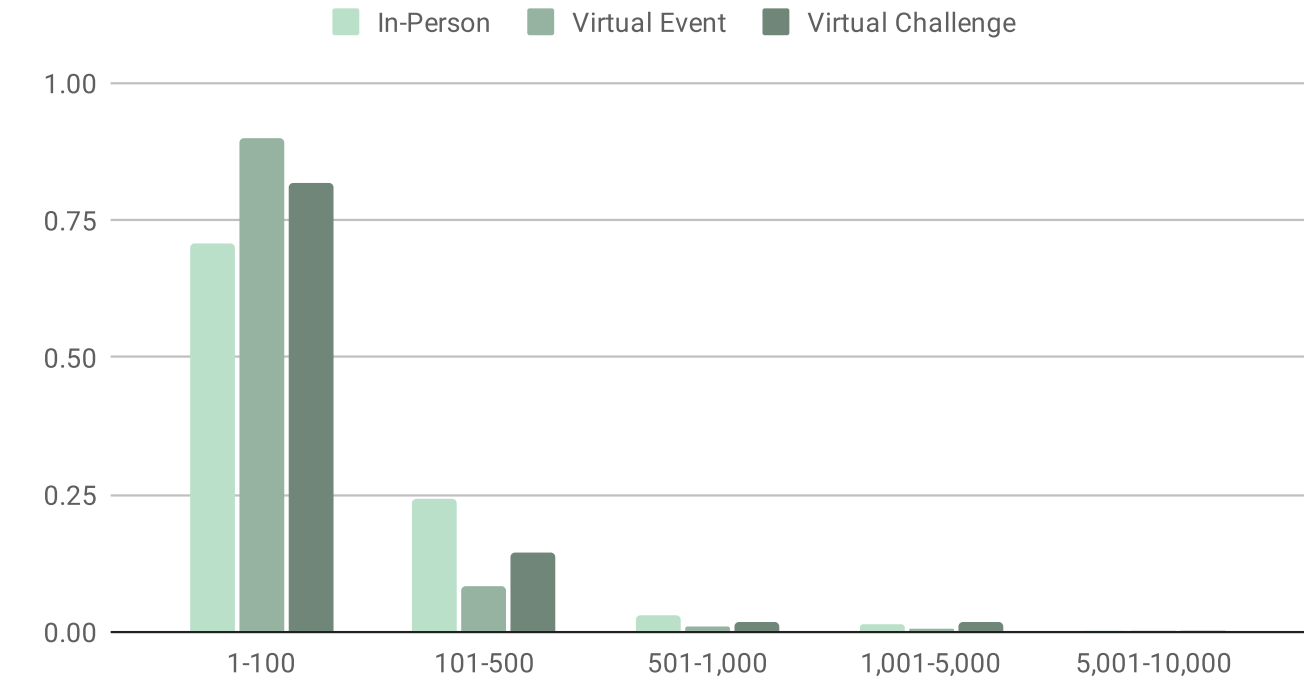
	2020 In-Person Events	2021 In-Person Events	2022 In-Person Events	2023 In-Person Events
1-100	78.5%	74.0%	71.5%	71.0%
101-500	18.1%	22.1%	23.9%	24.4%
501-1,000	2.1%	2.3%	2.9%	3.0%
1,001-5,000	1.2%	1.5%	1.6%	1.6%
5,001-10,000	0.0%	0.0%	0.1%	0.1%
10,001+	0.0%	0.0%	0.0%	0.0%

Virtual Events by Size

	2020 Virtual Events	2021 Virtual Events	2022 Virtual Events	2023 Virtual Events	2021 Virtual Challenges	2022 Virtual Challenges	2023 Virtual Challenges
1-100	78.3%	83.7%	89.8%	91.6%	78.9%	81.8%	80.1%
101-500	18.3%	13.8%	8.4%	6.6%	18.1%	14.4%	14.7%
501-1,000	2.2%	1.5%	1.0%	1.2%	1.7%	2.0%	3.3%
1,001-5,000	1.1%	1.0%	0.7%	0.6%	1.1%	1.8%	1.6%
5,001-10,000	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%
10,000+	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

95% of In-Person Events in 2023 Had Fewer than 500 Participants

2023 Size of Event by Type



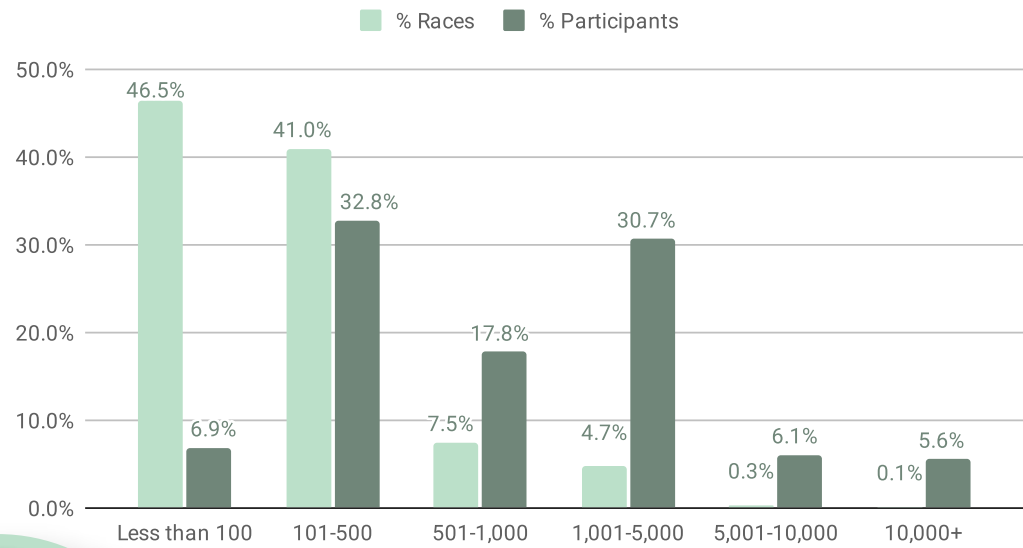
Participation in Races of Various Sizes

Finally, we evaluated the percentage of participants joining events of all sizes and compared that to the percentage of race weekends of that size. For this report, we looked at a full race weekend, not a single event within the weekend

While nearly half of all races (46.5%) had fewer than 100 participants, a relatively small percentage (6.9%) of all participants were competing at races of that size. On the flip side, 5.6% of participants compete in races with more than 10,000 participants, despite them making up just 0.02% of all races.

Percent of Races by Size Compared to Percent of Participants

Race size here includes all event distances within a single weekend.



6%
Registrations were for a Race with More than 10,000 Participants

Takeaways

- Learn from small events. The majority of the endurance industry is made up of community events with a personal connection to the runners in the area. To grow your business, start by building connections with that local running community and the organizations that they regularly come out to run with.
- The challenges and resources of a major marathon are very different from a nonprofit 5K. Seek out mentorship from races like your own through online forums like the Race Director’s Hub and local experts like timers and race management companies.

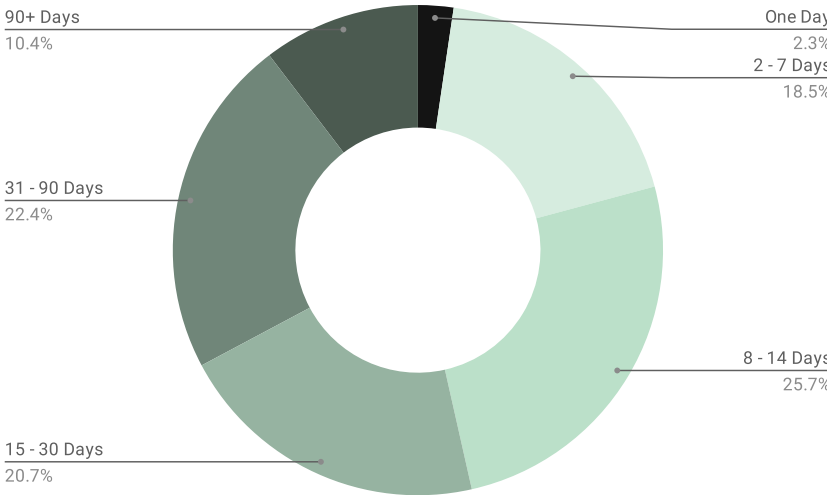


2.4 Length of Virtual Events

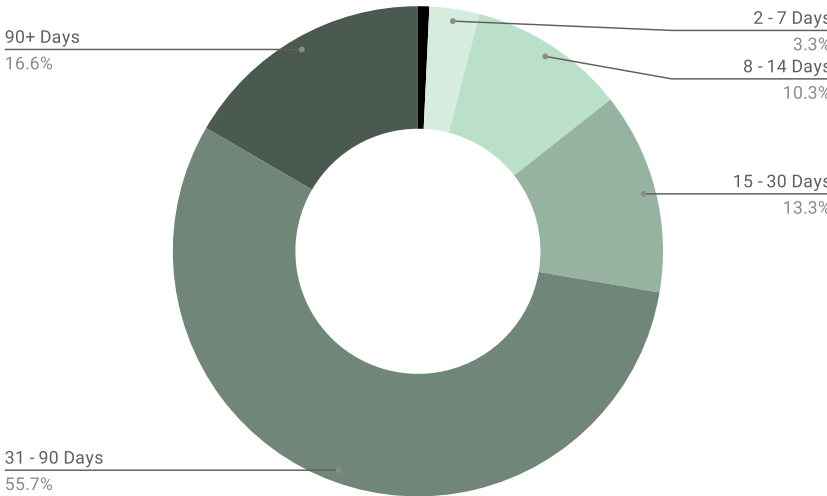
Unlike in-person races, virtual events and challenges typically require longer participation timelines. However, there are still differences between the two. Virtual events tend to have a prescribed timeline, with 67% of them running between 1-30 days. On the other hand, virtual challenges can be prolonged engagements, with 72% of them running for more than 31 days.

72%
of Virtual Challenges Run for More Than 30 Days

Length of a Virtual Race



Length of a Virtual Challenge





Takeaways

- Flexibility is a key motivator for someone to participate in a race virtually instead of in-person. If you're hosting a virtual event (or attaching one to your in-person option), provide a long enough timeline for everyone to complete their run.
- A virtual challenge should be just that: a challenge. Keeping participants engaged for a month or more requires a commitment, but it's also what makes them worthwhile for participants. Set up as many automated rewards as possible to keep people excited to continue.

“

RunSignup email is helpful to target participants based on the event they signed up for, and to know that they are current participants. We have used other [email] platforms in the past, but this way we are targeting the correct audience for each event.

Participant safety is our number one priority, and being able to send out updates with any course changes or weather updates is a key element to race day safety. Being able to use the features and functions from a phone at the beach is a huge plus!”

-Vicki V,
EventPower



03 Registration Trends

Registration

Trends

Key Findings and Trends

- Registration patterns in 2023 remained remarkably consistent with **24.8% of registrations processing on race week** and just **13.9% of registrations happening more than 3 months in advance**. All race distances aren't equal though – marathons saw just 7.1% of registrations on race week and 50.4% occurring more than 3 months prior to race day.
- There is no question that inflation and rising costs have led to increased prices for races. In 2023 prices increased for all distances and **10K prices were 4.4% higher than in 2022 and 10.5% higher than in 2019**.
- Mobile is first. In 2023 **73.5% of race website views were on a mobile phone or tablet**. Even more significant, a majority of 2023 transactions (**60.4%**) also took place on a mobile device or tablet.
- Easy payments lead to lower dropout rates and a better registration experience. Since the release of Apple Pay **31% of registrants paid with Apple Pay or a Saved Credit Card**.

Conclusions and Recommendations

- Consistently, a quarter of registrations take place on race week. Implement tools to manage the procrastination, such as inventory to track merch supplies and easy options for on-site and online registration up until the event starts.
- Race budgets are strained by rising costs. Continually reassess your race budget and event prices to ensure continued financial viability.
- Mobile is THE priority. If you aren't using a mobile-optimized RunSignup race website, test every step of your website and registration process on mobile and simplify your registration path with fewer custom questions.
- Make payments easy with an online option that provides as much payment flexibility as possible. The faster they can checkout, the more likely a participant will complete the registration process.



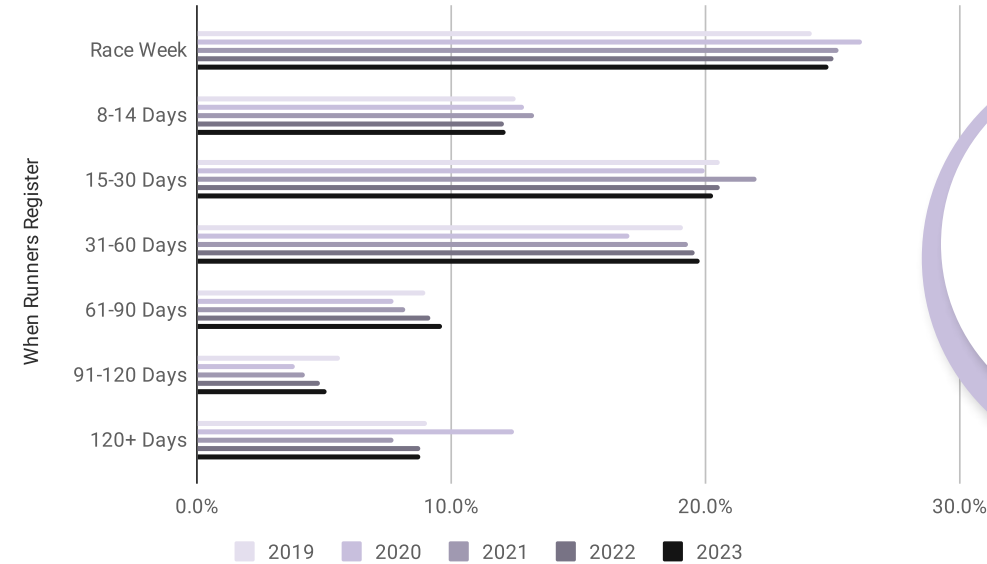
3.1 When Runners Register

The timing of registrations has been remarkably consistent over the last few years. As we've seen each of the previous years, procrastinators who wait until race week to register make up about a quarter of all participants. Across the board, registration patterns in 2023 looked very similar to those in

2019. The largest shift was a slight reduction in registrations more than 120 days before race day – which isn't surprising considering all the interruptions to long-term planning since 2020.

When Runners Register

When Runners Register	2019	2020	2021	2022	2023	Change 2019-2023	Change 2022-2023
Event Week	24.2%	26.1%	25.2%	25.1%	24.8%	-5.1%	-1.0%
8-14 Days	12.5%	12.9%	13.3%	12.1%	12.1%	-5.8%	0.2%
15-30 Days	20.6%	20.0%	22.0%	20.6%	20.3%	1.5%	-1.4%
31-60 Days	19.1%	17.0%	19.3%	19.5%	19.8%	16.2%	1.2%
61-90 Days	9.0%	7.7%	8.2%	9.2%	9.7%	25.2%	5.4%
91-120 Days	5.6%	3.9%	4.2%	4.8%	5.1%	32.4%	6.4%
120+ Days	9.0%	12.4%	7.7%	8.8%	8.8%	-29.5%	0.0%

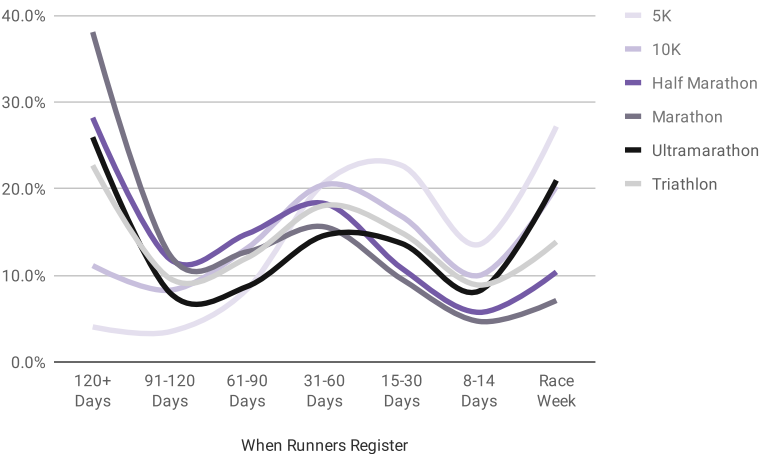


When Runners Register by Distance

Registration patterns by distance all follow a similar pattern of early interest, a mid-cycle boost, and then a drop until the race week scramble to register. However, the timing of those spikes and dips do vary when you break registrations down by the distance of the event. Shorter events like 5K's have the highest rate of last minute registrations, while

longer events like marathons and ultramarathons pull in a significant portion of their registrations more than 90 days before the race. Longer training cycles and larger financial commitments for long distance events (and triathlons) likely explain those differences.

	5K	10K	Half Marathon	Marathon	Ultra-marathon	Triathlon
Race Week	27.2%	20.3%	10.4%	7.1%	21.0%	13.9%
8-14 Days	13.5%	10.0%	5.7%	4.7%	8.2%	8.9%
15-30 Days	22.7%	16.8%	10.8%	9.5%	13.7%	14.9%
31-60 Days	20.7%	20.5%	18.3%	15.6%	14.6%	18.0%
61-90 Days	8.4%	13.1%	14.8%	12.7%	8.7%	12.0%
91-120 Days	3.5%	8.3%	11.8%	12.3%	8.0%	9.6%
120+ Days	4.0%	11.1%	28.2%	38.1%	25.9%	22.7%



Takeaways

- Late registrations aren't becoming *more* common, but they aren't going away either. Plan for a late rush and implement cost-saving strategies to manage uncertainty. Dynamic bib assignment can reduce wasted chips, and inventory management can prevent over-promising merch.
- Design a pricing strategy for your entire registration period. Price increases and time-limited coupons can drive earlier registrations.

- While you may not be able to prevent late registrations, significant price hikes for the last week can help you increase revenue to offset the inconvenience and cost of uncertainty.
- Consider flexible participant management options that allow participants the freedom to sign up *now*. Easy distance changes, bib transfers, and deferral options give participants the confidence to take the leap early in the training process.

3.2 Registration Times

The true value of online registration is that it’s always open. Traffic is notably lighter between midnight and 6:00am, but participants are online and ready to sign up throughout the day and late into the night.

What Time do Participants Register?

Sign Up Hours	2019	2020	2021	2022	2023
Midnight - 6 AM	2.0%	2.8%	2.4%	2.2%	2.2%
6 AM - 9 AM	10.2%	10.0%	10.3%	10.4%	10.6%
9AM - Noon	20.9%	21.1%	21.4%	21.4%	21.3%
Noon - 3 PM	18.9%	19.4%	19.1%	19.0%	18.8%
3 PM - 6 PM	16.6%	17.3%	17.0%	17.1%	17.0%
6 PM - 9 PM	17.9%	17.9%	18.0%	18.0%	18.2%
9 PM - Midnight	13.6%	11.6%	11.8%	12.0%	12.0%



Takeaway

- Mix up the timing of your digital promotions to reach more people. Peak interest happens between 9am and noon, but potential participants are online consistently throughout the workday and evening.



3.3 Pricing Trends

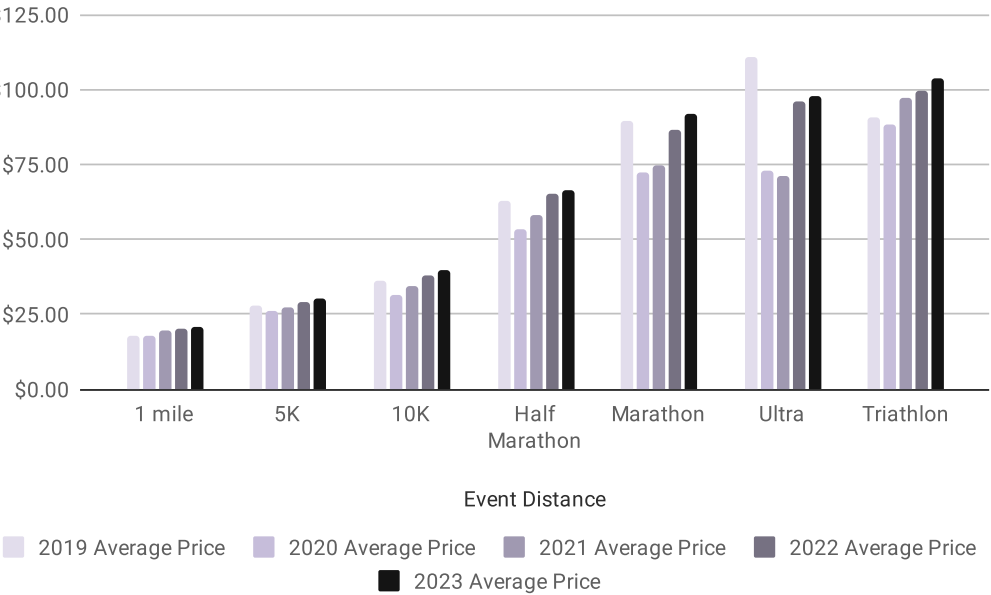
Average Price

Event prices continued to rise in 2023, with average prices for all distances increasing when compared to 2022. Inflation, rising municipal costs, debt accrued during the pandemic, and challenges re-growing events are all likely factors leading to higher prices. Prices in 2020 and 2021 were artificially low due to the reduced overhead of virtual events. However, prices in 2023 have also exceeded 2019 levels for nearly all distances.

Note: Ultramarathons still lag 2019 prices, likely because they are also the events that are still the most likely to be impacted by virtual event pricing. Many virtual challenges are recognized as races of more than 26 miles.

Average Price by Event Distance

Race Distance	2019 Average Price	2020 Average Price	2021 Average Price	2022 Average Price	2023 Average Price	Change 2022-2023	Change 2019-2023
1 mile	\$17.99	\$17.73	\$19.60	\$20.05	\$20.71	3.3%	15.1%
5K	\$28.05	\$26.39	\$27.40	\$28.94	\$29.97	3.6%	6.8%
10K	\$35.97	\$31.27	\$34.55	\$38.09	\$39.75	4.4%	10.5%
Half Marathon	\$63.09	\$53.13	\$58.38	\$65.29	\$66.44	1.8%	5.3%
Marathon	\$89.53	\$72.25	\$74.47	\$86.62	\$91.62	5.8%	2.3%
Ultra	\$110.99	\$72.64	\$70.98	\$95.73	\$97.65	2.0%	-12.0%
Triathlon	\$90.50	\$88.41	\$97.15	\$99.64	\$103.46	3.8%	10.1%



The Role of Price Increases

Interestingly, races in 2023 continue to utilize fewer price increases than they did in 2019. Despite their power to motivate action, races average just .5 to 2.5 price increases throughout their registration cycle. Unsurprisingly, longer distances with higher average price points typically have longer buying cycles and more price increases.

Number of Price Increases

Race Distance	2019 # of Price Increases	2020# of Price Increases	2021 # of Price Increases	2022 # of Price Increases	2023 # of Price Increases	Change 2022-2023	Change 2019-2023
1 mile	0.6	0.4	0.5	0.6	0.6	0.0%	0.0%
5K	1	0.7	0.7	0.9	0.9	0.0%	-10.0%
10K	1.4	0.9	1.0	1.3	1.3	0.0%	-7.1%
Half Marathon	2.1	1.2	1.4	1.7	1.7	0.0%	-19.0%
Marathon	2.2	1.2	1.3	1.8	2	11.1%	-9.1%
Ultra	1.5	0.7	0.8	1.1	1.3	18.2%	-13.3%
Triathlon	2.2	1.5	2.0	2.4	2.5	4.2%	13.6%

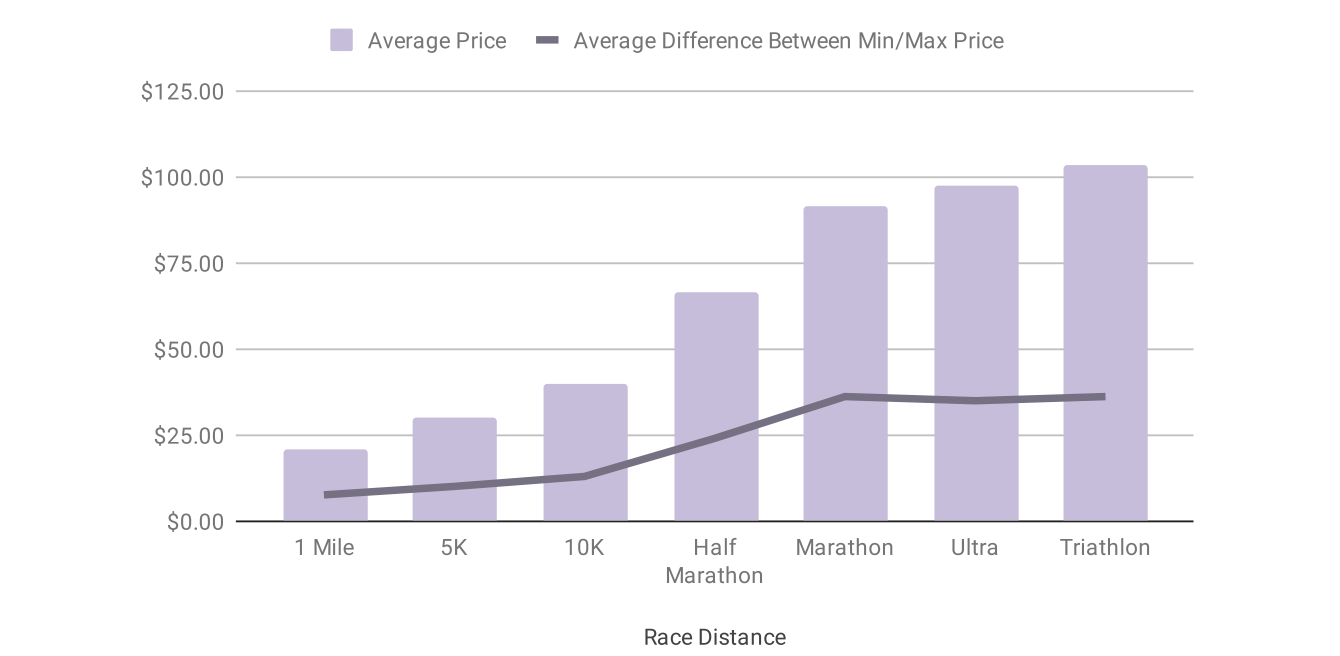
As you would expect, the longer the distance (and higher overall price), the greater the difference between a race’s minimum and maximum prices.

Difference Between Minimum and Maximum Prices

Race Distance	2019 Difference	2020 Difference	2021 Difference	2022 Difference	2023 Difference
1 mile	\$6.65	\$7.17	\$7.27	\$7.60	\$7.67
5K	\$10.38	\$10.85	\$8.94	\$9.61	\$10.13
10K	\$11.53	\$10.90	\$10.73	\$12.33	\$13.02
Half Marathon	\$24.25	\$20.90	\$20.29	\$23.07	\$24.09
Marathon	\$36.49	\$28.30	\$28.77	\$32.68	\$36.23
Ultra	\$39.33	\$27.48	\$28.63	\$33.79	\$35.02
Triathlon	\$28.35	\$27.90	\$29.90	\$32.23	\$36.23

\$36.23 Separated the Low and High Price for a Marathon in 2023

Average 2023 Price Compared to Difference Between Minimum and Maximum Prices



Minimum and Maximum Prices

Finally, we take a look at the average minimum price and average maximum price across distances. We can verify that prices are increasing both at the open of registration and at the highest price point.

Note: this data includes both races that have price increases, and those with a single fixed price.

Average Minimum Prices

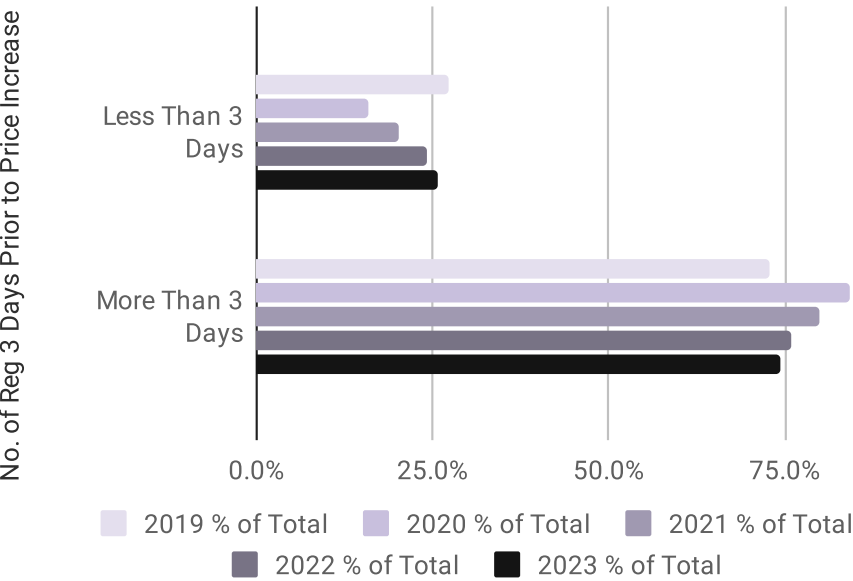
Race Distance	2019 Avg Minimum Price	2020 Avg Minimum Price	2021 Avg Minimum Price	2022 Avg Minimum Price	2023 Avg Minimum Price	Change 2022-2023	Change 2019-2023
1 mile	\$16.70	\$16.74	\$18.31	\$18.52	\$19.21	3.7%	15.0%
5K	\$25.24	\$24.44	\$25.59	\$26.67	\$27.51	3.1%	9.0%
10K	\$32.29	\$29.05	\$31.97	\$34.45	\$36.06	4.7%	11.7%
Half Marathon	\$54.50	\$48.20	\$52.74	\$57.95	\$59.17	2.1%	8.6%
Marathon	\$77.76	\$65.77	\$67.08	\$76.64	\$80.24	4.7%	3.2%
Ultra	\$99.01	\$67.74	\$65.52	\$87.87	\$88.85	1.1%	-10.3%
Triathlon	\$79.04	\$79.50	\$86.13	\$86.74	\$88.78	2.4%	9.7%

3.4 Pricing Strategies

How do you drive action? Deadlines. More than a quarter of all registrations in 2023 were driven by pending deadlines, including price increases and the close of registration. This shows time-based calls to action are a reliable method for prompting registrants to (finally) pull the trigger. While fewer price increases in 2020 and 2021 led to fewer opportunities for time-sensitive calls to action, it's clear price-motivated registration has fully returned.

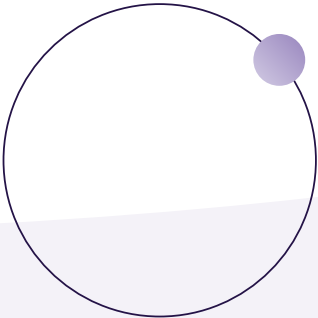
No. of Registration 3 Days Prior to Price Increase or Registration Close	2019 % of Total	2020 % of Total	2021 % of Total	2022 % of Total	2023 % of Total
Less Than 3 Days	27.2%	15.8%	20.2%	24.1%	25.6%
More Than 3 Days	72.8%	84.2%	79.8%	75.9%	74.4%

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



Average Maximum Prices

Race Distance	2019 Avg Maximum Price	2020 Avg Maximum Price	2021 Avg Maximum Price	2022 Avg Maximum Price	2023 Avg Maximum Price	Change 2022-2023	Change 2019-2023
1 mile	\$19.27	\$18.74	\$20.91	\$21.59	\$22.23	3.0%	15.4%
5K	\$30.83	\$28.34	\$29.21	\$31.22	\$32.43	3.9%	5.2%
10K	\$39.78	\$33.61	\$37.14	\$41.77	\$43.45	4.0%	9.2%
Half Marathon	\$71.94	\$58.12	\$64.00	\$72.64	\$73.68	1.4%	2.4%
Marathon	\$102.51	\$78.76	\$81.75	\$96.67	\$103.00	6.5%	0.5%
Ultra	\$123.82	\$77.55	\$76.47	\$103.56	\$106.18	2.5%	-14.2%
Triathlon	\$101.77	\$97.18	\$108.30	\$112.45	\$117.68	4.7%	15.6%



Takeaways

- Prices have increased for products and events across the country. Re-evaluate your budget at the start of every year to make sure your pricing structure covers your expenses in 2024 dollars.
- Take advantage of the power of pricing. Create a pricing plan that incorporates price increases and utilizes email marketing, social media, and your website to motivate registrants to act while the price is low.
- Pricing isn't only about driving earlier registrations. You know that some percentage of participants will always procrastinate – setting a high final price point can also help you boost last minute revenue.

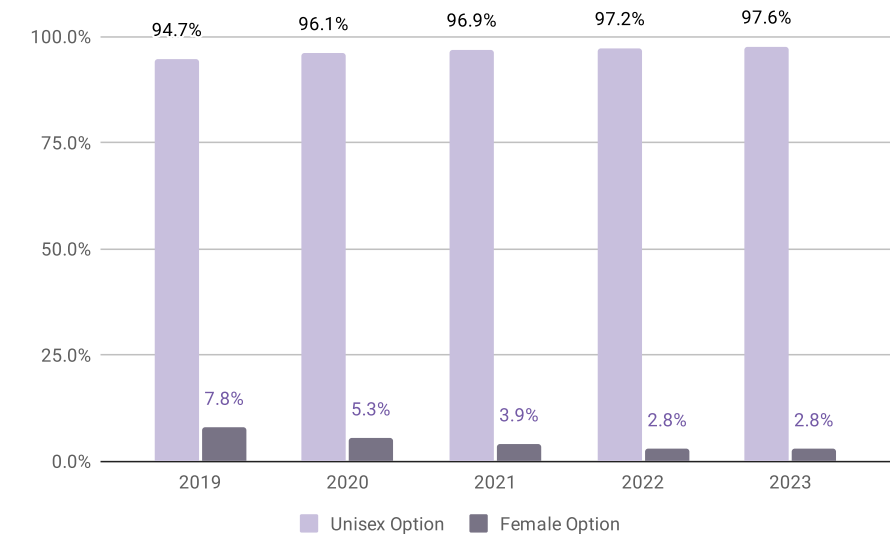
Takeaway

- Pricing drives registrations. While price increases are valuable, look for additional pricing strategies like age-based pricing, discounts for group size, membership discounts, and loyalty programs to capitalize on the motivating power of price. A word of caution though: too many promotions dilutes the power of discounts. Pick one or two pricing strategies and make sure potential participants know about them!

3.5 Giveaways

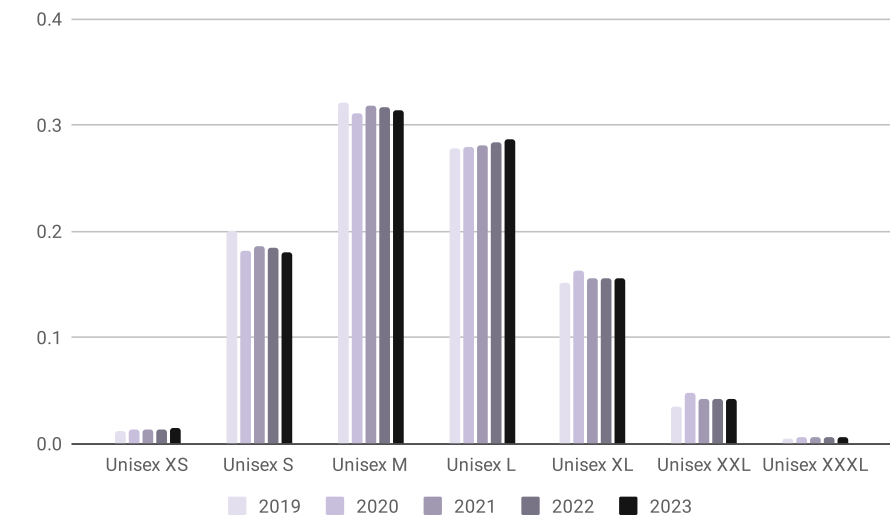
While female athletes are overrepresented in endurance events, shirt giveaways tend to only be available in unisex sizes. In 2023, only 2.8% of races offered a female-specific shirt size. Increasing shirt costs may be contributing to races streamlining their race options.

Additionally, the RunSignup system can only track races that use the automated options for female shirts. It's likely that this leads to an undercount of women's cut shirts, especially as some races may opt for non-gendered wording like "relaxed cut" and "fitted shirt".



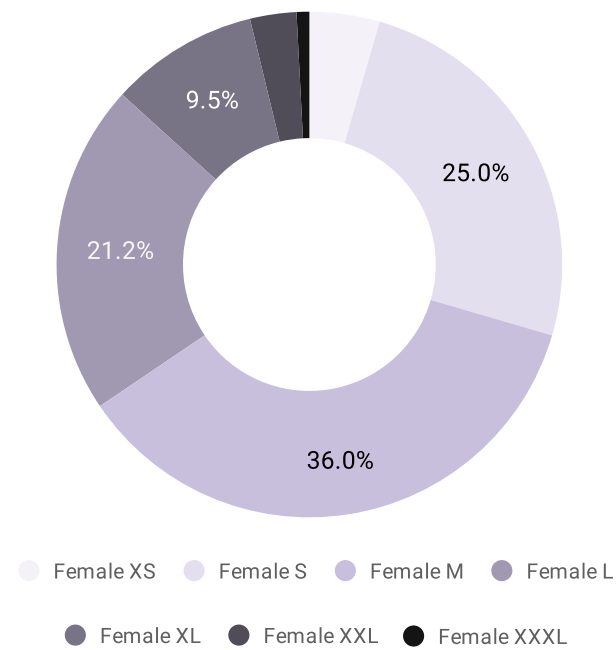
Among the races offering unisex race shirts, medium and large are the clear leaders, with 60% of registrants opting for one of those sizes.

Unisex Shirt Size Breakdown



Medium is also the most common selection when female shirt sizes are offered. However, it's worth noting that 30% of female shirts were small or x-small, sizes that often don't have comparable options in unisex sizes.

Female Shirt Size Breakdown



Takeaways

- Women make up the majority of endurance participants. Regardless of how you name your shirt options, make sure you offer smaller, more fitted sizing options for the 30% of women who would order a size below unisex small.
- Worried that your participants have too many shirts and yours will go to waste? Offer a discount for participants who opt out of getting the shirt.
- With shirt costs rising, consider if it's still the right giveaway for your event. Creative options like hats and gloves may get more mileage than another t-shirt.

3.6 Merchandise

Merch can be a revenue booster for events with a brand name or premium swag. There are two ways to add paid merchandise on RunSignup, either as an add-on (offered only during registration) or a store item (offered during and/or outside of registration). In 2023, 14% of registrants purchased an add-on item when it was available.

\$1,045 Average Event Revenue from Add-Ons
\$1,899 Average Event Revenue from Store Items

Purchases with Add-Ons

Purchases with Add-Ons	2019	2020	2021	2022	2023
Percent of Registrations with Add-Ons	15.8%	22.3%	16.8%	15.3%	14.3%
Percent of Revenue with Add-Ons	3.2%	5.0%	4.0%	4.0%	3.4%
Average Amount Paid for Add-Ons	\$8.21	\$7.91	\$10.31	\$12.40	\$11.54
Average Event Revenue from Add-Ons	\$1,236.81	\$837.38	\$936.99	\$1,122.73	\$1,045.73

Store items typically have a higher price point than add-ons. This is because add-ons are often (but not always) used for upgrades for participants (such as \$5 for a tech shirt instead of cotton), whereas store items are likely to be luxury items that appeal to participants and spectators alike (such as a jacket or light-up hat). The average amount spent on store items has steadily increased since 2019.

\$11.54 Average Cost of Add-Ons
\$37.37 Average Cost of Store Items

Purchases with Store Items:

Purchases with Store Items	2019	2020	2021	2022	2023
Percent of Registrations with Store Items	1.2%	2.2%	2.0%	1.4%	1.3%
Percent of Revenue with Store Items	0.9%	1.8%	1.5%	1.0%	1.0%
Average Amount Paid for Store Items	\$29.48	\$27.72	\$32.76	\$36.24	\$37.37
Average Event Revenue from Store Items	\$1,152.14	\$1,222.28	\$2,098.37	\$1,748.50	\$1,899.68

Takeaways

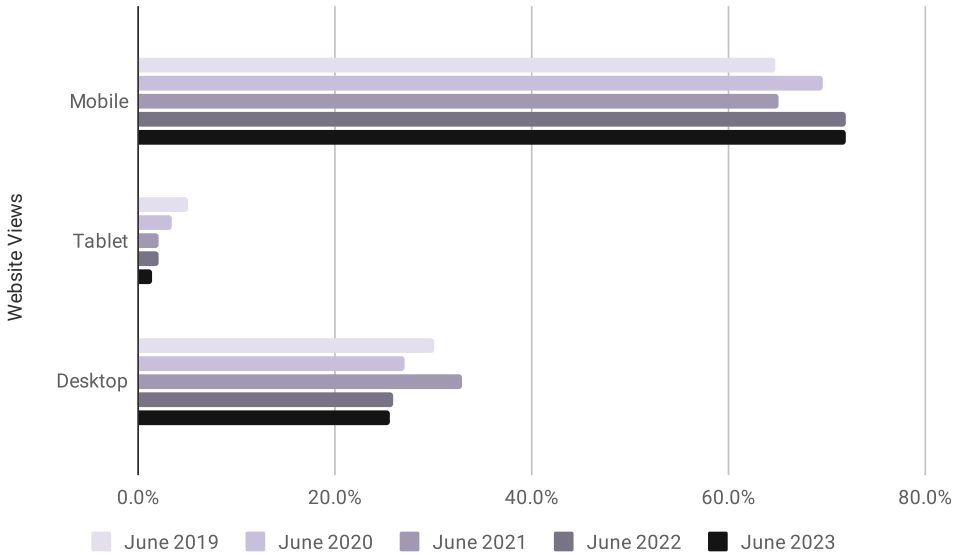
- Looking to make up for increasing costs? High quality merchandise can provide a nice boost with low overhead. If you're investing in swag to drive revenue make sure you're also investing time to promote the items through your website, email, and social media campaigns.
- Add-ons don't have to be physical items. Experiential upgrades like VIP parking passes, race-day tents, and skip-the-line check-in can help you increase your per-participant revenue.

3.7 Mobile Adoption

Mobile IS first. For a snapshot of how registrants are relying on mobile, we used the Google Analytics data from race websites in June of each year. In 2023 72% of website views were on mobile devices (and another 1.5% were on tablets).

Website Views by Device Type

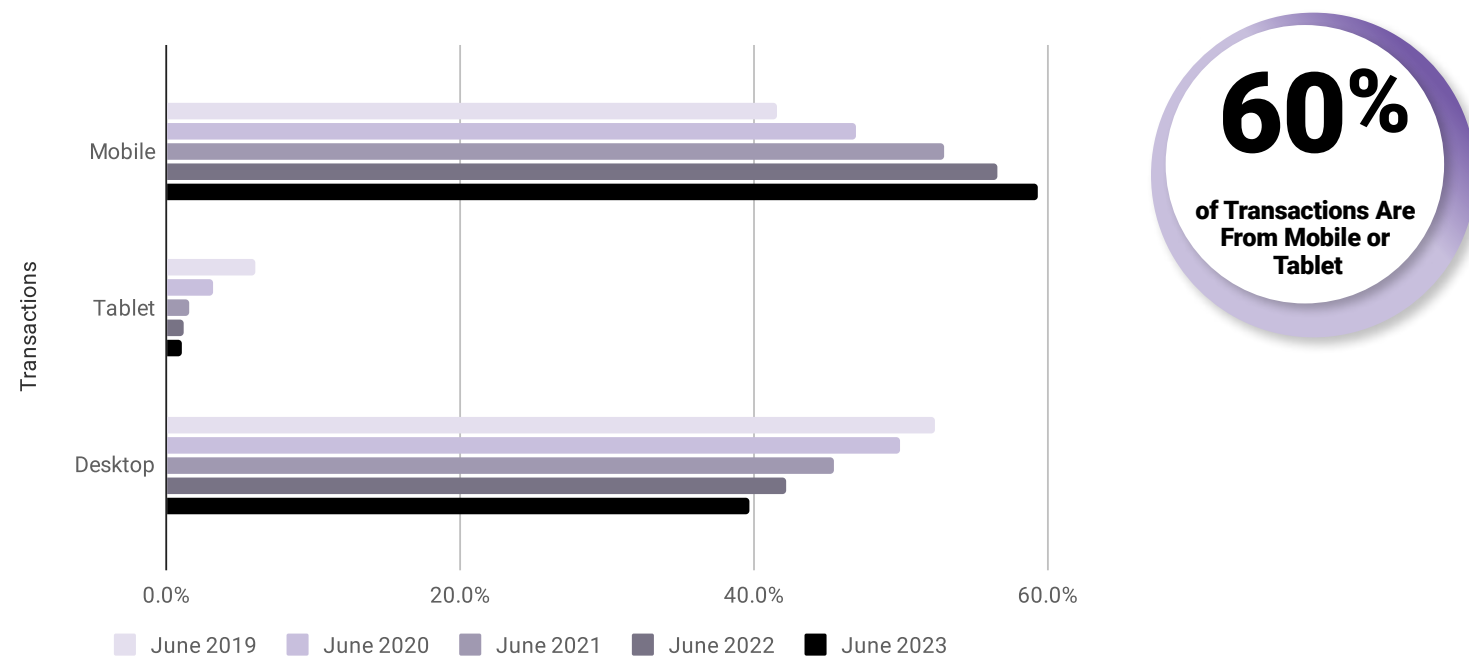
Website Views	June 2019	June 2020	June 2021	June 2022	June 2023
Mobile	64.8%	69.6%	65.0%	71.9%	72.0%
Tablet	5.1%	3.3%	2.1%	2.1%	1.5%
Desktop	30.2%	27.1%	32.8%	26.0%	25.6%



Transactions by Device Type

Phones aren't just for research anymore. In 2023 60% of all transactions took place on a mobile device or tablet. We've also seen increased participant confidence in registering on mobile rise consistently each year and expect to see additional increases next year due to the release of Apple Pay for registrations in July 2023.

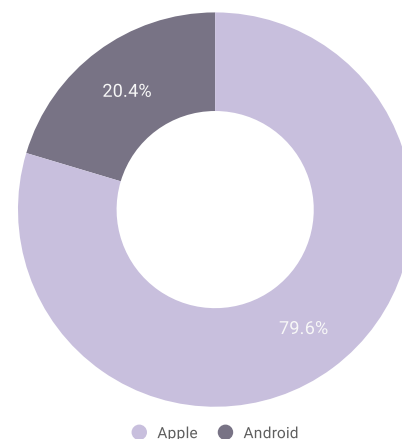
Website Views	June 2019	June 2020	June 2021	June 2022	June 2023
Mobile	41.6%	46.9%	53.0%	56.5%	59.3%
Tablet	6.0%	3.2%	1.6%	1.2%	1.1%
Desktop	52.4%	50.0%	45.4%	42.2%	39.6%



Device Type

Apple continues to lead the mobile market. In 2023 the share of mobile views coming from Apple devices rose slightly to 80%.

Device Type	June 2019	June 2020	June 2021	June 2022	June 2023
Apple	72.0%	71.5%	74.8%	77.6%	79.6%
Android	28.0%	28.5%	25.2%	22.4%	20.4%



80% of Mobile Traffic is on Apple Devices

Takeaways

- Mobile isn't optional. RunSignup optimizes our websites, email, and registration pathways for a mobile experience. No matter what technology you use, it's crucial that you test all communications and registrations on mobile devices.
- People are increasingly comfortable with spending money on their phones. Make sure it's easy for them to do things with limited open-ended questions, no extraneous data collection, (securely) saved credit card data, and Apple Pay.
- Take advantage of easy mobile registration to limit (or eliminate) the need for on-site registration kiosks. Signage with QR codes directly to your registration can make it simple for race day registrants to sign up on their phones without requiring additional hardware..

3.8 Payments

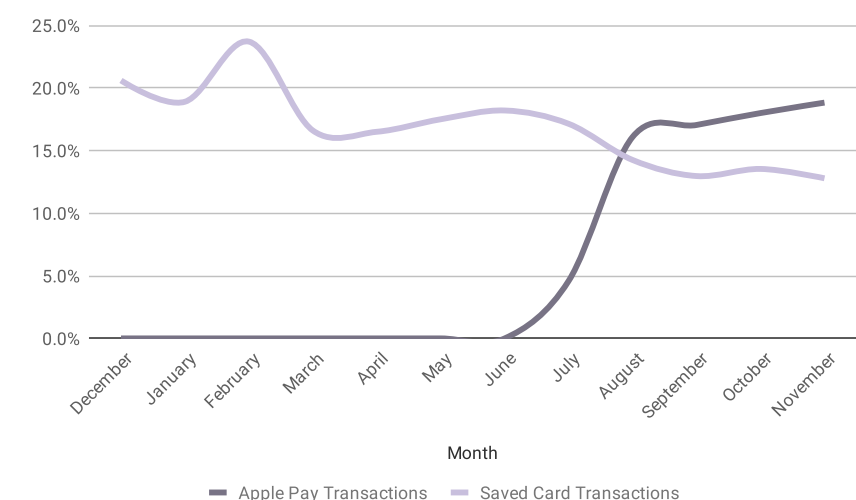
At its core, online registration is about convenience. RunSignup has had the option to securely save credit card data since 2015 and in July of 2023 we introduced the ability to pay via Apple Pay. Both payment options increased the speed of completing a registration and reduced the dropout rate, particularly for the 60% of transactions that took place on a mobile device.

Since the introduction of Apple Pay, the percentage of transactions that take place via a saved credit card has fallen slightly, with some registrants likely opting for Apple Pay instead of accessing a saved card. All told, since Apple Pay was fully enabled, 31% of registrants have sped up their registration process via either a saved credit card or Apple Pay.

Payments Made Via Apple Pay or Saved Credit Card



Device Type	Apple Pay Transactions	Saved Card Transactions	% Transactions with Apple Pay or Saved Card
December	0.0%	20.6%	20.6%
January	0.0%	18.9%	18.9%
February	0.0%	23.7%	23.7%
March	0.0%	16.6%	16.6%
April	0.0%	16.5%	16.5%
May	0.0%	17.5%	17.5%
June	0.0%	18.2%	18.2%
July	4.6%	17.1%	21.7%
August	16.1%	14.2%	30.3%
September	17.0%	13.0%	30.0%
October	18.0%	13.5%	31.5%
November	18.8%	12.8%	31.6%



Takeaway

- Prioritize making registration easy. Saved credit cards and mobile payment options can reduce cart abandonment, but review your entire registration process. Make sure unnecessary data collection is eliminated and your registration platform has mobile-friendly inputs.

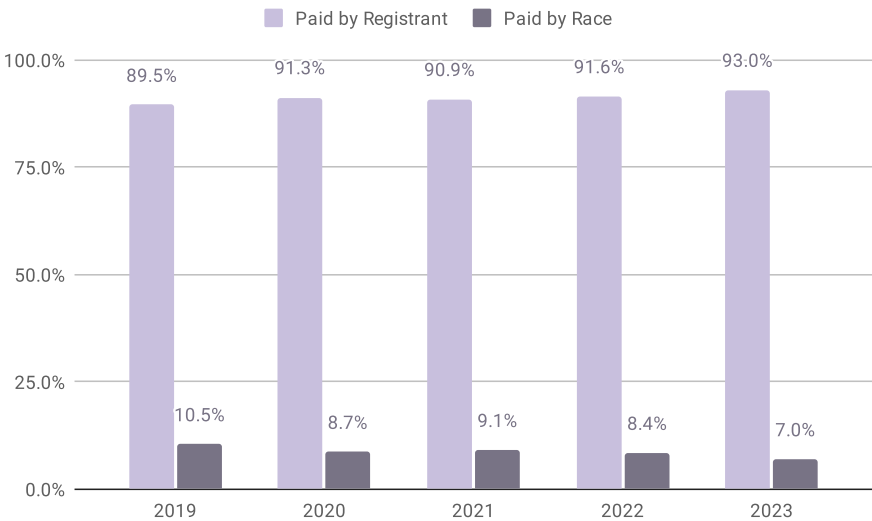
3.9 Processing Fees

Processing fees are inevitable in online registration or ticket purchase. Fees are how registration companies pay for the infrastructure and development required and, in many cases, cover credit card processing fees.

Unlike major concert tickets, processing fees for races tend to be relatively low (at RunSignup, they are 6% + \$1/per transaction). Additionally, races can opt to pass the processing fee onto registrants, absorb the fee themselves, or split it.

Fees are overwhelmingly covered by the end user (registrant or donor), with just 7% of 2023 fees paid by the race.

Year	Paid by Registrant	Paid by Race
2019	89.5%	10.5%
2020	91.3%	8.7%
2021	90.9%	9.1%
2022	91.6%	8.4%
2023	93.0%	7.0%



Takeaways

- Processing fees are expected as a part of the online purchasing experience. Save revenue by passing fees onto your participants or giving them the option to cover fees (they often will!).
- Fees can also be an additional source of revenue. RunSignup partners can add an additional fee to the checkout process to boost their income with a minimal impact to each participant.



I was delighted and relieved to find an online registration site by runners. It's about time a race registration site exudes attention to detail and provides nurturing support 24/7. They have exceeded my expectations."

- Helene N,
National Nurses Half Marathon & 8K



04 Marketing Trends



Marketing Trends

Key Findings and Trends

- Referral rewards are a cost-effective way to expand your funnel, with a **2023 cost per acquisition of just \$1.30**. On average, **5% of a race's transactions are attributed to referrals** when they are enabled.
- Across each of the last five years approximately 30% of participants have joined teams when they are available, with **30.5% of participants opting to join a team in 2023**.
- More events are using RunSignup's free email marketing to send more emails than ever, with **553 million emails sent in 2023**. The result of those emails? RaceInsights attributes **17% of 2023 transactions to the RunSignup email system**.
- **Google's organic search resulted in 26.6% of all race website views in 2023**, while paid search contributed just 0.3% of race website views.

Conclusions and Recommendations

- Referral rewards programs work, but only if you take the time to invest in them. Make sure you're promoting your rewards on your website, social media, and emails and stack your incentives to provide extra motivation to super-supporters.
- Team options can boost your registrations, but more than that they make the event experience even more fun. Consider fun contests, photo competitions, and team spirit awards to keep energy high throughout the event.
- Email marketing is a key component of any race marketing campaign, but costs can add up quickly as your contact lists grow. Cut your costs with free email and track the success of your emails through RaceInsights Analytics.
- Your website is the public face of your race. Make sure that your site is SEO-optimized so potential participants can easily find it and include dynamic content for details like price and fundraising leaders to ensure it's always up to date.

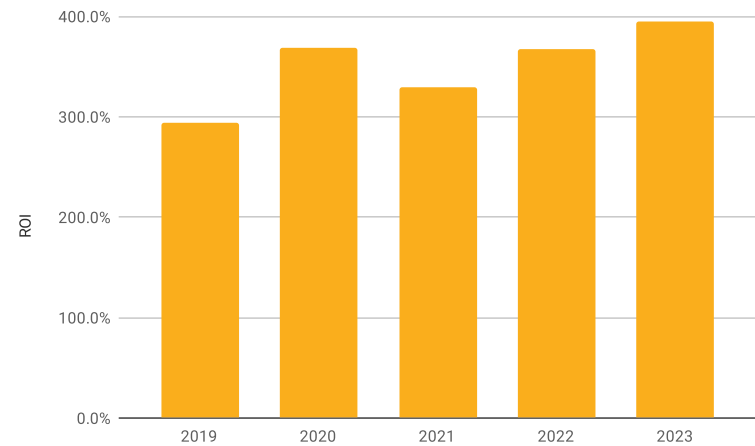
4.1 Coupons

Coupons are a quick and easy way to motivate potential participants to sign up. In 2023 6.4% of registrations used a coupon to discount their registration. The average discount amount has steadily remained under \$15, indicating that even small price breaks can prompt action.

Coupon Usage and ROI

Coupons	% of Registrations Using Coupons	ROI	Average Discount	Total Discounts	Net Revenue From Coupons
2019	8.0%	294.0%	\$13.88	\$5,696,303	\$16,748,501
2020	5.5%	368.3%	\$10.71	\$2,117,844	\$7,800,917
2021	5.8%	328.7%	\$12.75	\$3,156,602	\$10,376,051
2022	6.1%	367.3%	\$12.14	\$4,126,419	\$15,156,513
2023	6.4%	394.6%	\$12.65	\$5,065,230	\$19,988,624.88

Coupon ROI



\$12.65 Average Discount for a Coupon

The ROI on coupons has continually improved over the last five years, with average races having an ROI of 395% on coupons. That means that they collected 395 times as much in registration dollars as they waived in coupons.

Takeaways

- The goal of most coupons is to drive action and it doesn't take a huge price break to do that. Coupons of \$10-15 appear to be the sweet spot for many events.
- Be cautious with your coupon strategy. To avoid over-discounting your race, pick just a few key promotions or partnerships to discount via coupons. Then, make every coupon time limited and promote them across your channels.

4.2 Referral Rewards

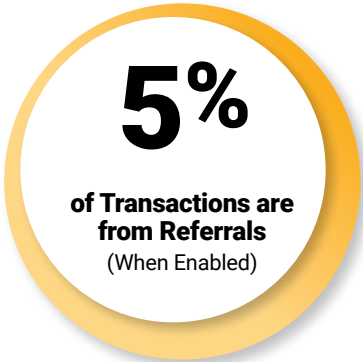
Referral rewards programs have been one of the most consistently successful promotional tools on the RunSignup platform since they were introduced in 2016. In 2023, the total percent of registrations and transactions attributed to referrals fell slightly to 5%. We attribute this to two factors:

- Referral programs had inflated levels of success throughout the pandemic because of the increase in online activity and virtual events.
- Enabling a referral rewards program is now one of the "suggested settings" for race directors as they complete their race setup. While we do this because we know referral programs work, it also leads to some percentage of races who enable the referral setup but do not follow through to promote the option to their participants.

Regardless, referrals continue to be an effective way to engage existing supporters as ambassadors. **With a low cost per acquisition of just \$1.30, referrals are significantly less expensive than traditional advertising.**

Percent of Registrations and Transactions from Referral Rewards

	2018	2019	2020	2021	2022	2023
# Total Registrations	6%	6%	13%	7%	5%	5%
# Total Transactions	6%	7%	17%	8%	6%	5%



\$1.30 Cost Per Acquisition for Each New Registration via Referral Reward Refunds

Referral Rewards Results

	2019	2020	2021	2022	2023
# Referral Codes	304,559	436,761	482,857	314,446	491,218
# Event Page Views	2,074,611	12,853,014	6,283,731	1,979,469	12,468,330
# Sign Up Page Views	274,629	646,415	335,613	240,335	367,436
# Completed Registration Transactions	104,639	232,034	141,411	115,943	160,483
# Completed Registrations	129,485	269,548	165,991	141,830	201,870
Completed Registration Amounts	\$6,314,452.28	\$12,123,526.60	\$8,322,654.42	\$7,481,605.57	\$9,863,442.23
# Referral Refunds	10,131	21,937	20,601	13,210	22,534
Estimated Referral Refund Amounts	\$132,523.64	\$233,854.27	\$231,603.46	\$139,539.18	\$261,581.30
Estimated ROI	4665%	5084%	3493%	5262%	3671%
Estimated CPA	\$1.02	\$0.87	\$1.40	\$0.98	\$1.30

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

Value of Registrations vs.
Cost of Refund Rewards



The Sweet Spot: Reward Thresholds

All referral programs are not created equal. The sweet spot for referrals is typically 3-5 referrals for a reward – high enough to be challenging, but low enough to be perceived as attainable. Also, to motivate participants the refund has to be high enough to be meaningful. On average, events with a referral threshold of 3-5 referrals offer a refund of \$20.13.

Average Refund Offered by
of Referrals Required

# Referrals Required for Refund	Average Refund
1-2	\$6.15
3-5	\$20.13
6-10	\$21.55
11-19	\$27.26
20+	\$13.13

Takeaways

- The best advertising for your event? Personal recommendations from participants in your event. Create a referral program to incentivize participants to share the event with friends and family.
- The refunds in a RunSignup referral program are automated, but that doesn't mean you shouldn't spend any time on the program. Participants need to know about your referral rewards. Make sure your program is highlighted on your website, included in registration follow-up emails, and shared on your social media.
- Cultivate super supporters with stacked rewards programs that incorporate refunds, merch, and on-site perks like VIP parking. Most participants won't achieve the high threshold of 15-20 referrals, but a few motivated people will – and rewarding them well will ensure they continue to be ambassadors for your event for years to come.

4.3 Groups/Teams

Whether they are social or competitive teams, participating in events *together* has evergreen popularity. Group/team joining has remained remarkably steady over the last 5 years, with 31% of participants opting to join a group this year (when offered).



Group Participation
and Size

Year	% Participants in Groups	Average Group Size
2019	29.4%	6.4
2020	31.4%	6.6
2021	29.8%	6.8
2022	30.4%	6.8
2023	30.5%	6.9

While the average size of each team has also remained relatively consistent, we have seen a gradual increase in team size. In 2023 there was an average of 7 participants per team.

Takeaways

- Providing incentives based on team size spurs existing participants to invite their friends and family. Make sure you communicate your group/team incentives to current participants to encourage them to promote your event to their network.
- If your teams are strictly social, always allow participants in different events/distances to join the same team. An inclusive team option drives multi-generational participation and inspires beginners to join in.
- The promotional power of teams doesn't end when a participant registers. Team participation engenders a more social and interactive race day, ensuring a positive experience for your participants and leading to better word of mouth marketing.

4.4 Email Marketing

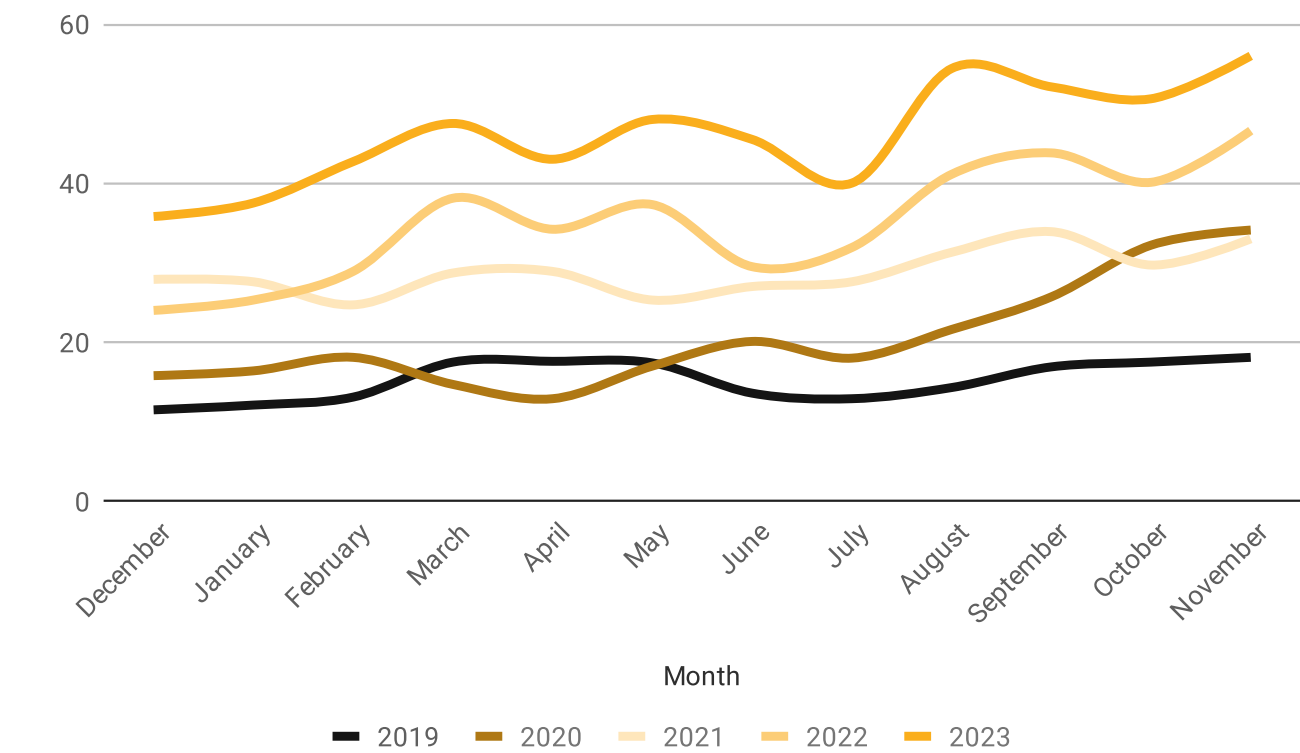
RunSignup’s integrated email marketing platform gives race directors a free and easy way to reach current and former participants, volunteers, fundraisers, donors, and custom lists of contacts. Over the last five years usage of the email marketing platform has grown consistently, with an additional boost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

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

553

Million Free Emails
Were Sent by Race
Directors in
2023

Total Emails Sent via Email Marketing (in Millions)



Takeaways

- Email marketing is a cornerstone of event promotion. Opt for free email tools that give you the flexibility to decide who and how often to email without juggling the financial burdens.
- Save time with pre-built email templates that include common replacement tags to make your emails more personal and informative. Pre-built emails can help you with everything from your registration launch to your pre-event debrief.

4.5 Google Analytics

The data in this section is from our Google Analytics data for June of each year, providing an overview of how participants find and interact with event websites. This is the same data used to evaluate mobile adoption in Section 3.7. Google data does not capture every session or visit; rather, the reports are based on the volume in the first chart below.

Traffic Volume Represented

	June 2019	June 2020	June 2021	June 2022	June 2023
Sessions	4,802,362	5,647,270	6,023,060	6,156,981	7,538,035
Transactions	\$17,171,019	\$13,428,707	\$21,390,862	\$25,035,787.99	\$30,762,386.84

Referral Sources for events are usually race calendars like RunningintheUSA.com, websites for timers or race series’, or non RunSignup race websites (like scottcoffeerun.com).

Organic Search is a link from Google that is not a paid ad. The high ranking of RunSignup event websites, and the increasing number of events using those websites as their main website, means organic search is key to driving traffic to event websites. Paid Search, on the other hand, is a minor-driver of website traffic and usually utilized only by larger, high-budget events.

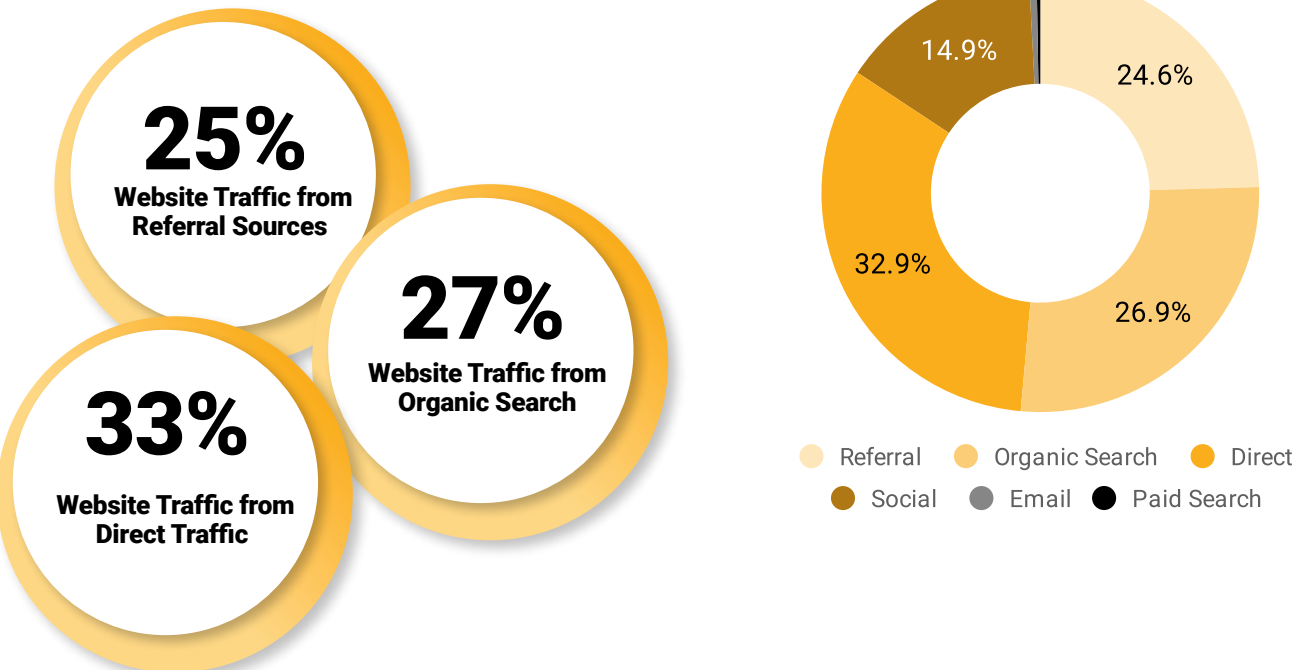
Direct Traffic, or typing the exact URL, has been the largest driver of traffic over the last two years. Some of this is likely incorrect attribution of traffic driven by emails.

Social Sources are covered in detail later in this section.

In 2023, Direct Traffic, Referral Sources, and Organic Search made up the majority of website traffic with each making up 25%-33% of all traffic. Meanwhile, traffic from social sources has continued to fall post-pandemic.



Sources of Website Views



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

Traffic Sources

Source	June 2019	June 2020	June 2021	June 2022	June 2023
Referral	31.4%	18.5%	22.0%	24.8%	24.3%
Organic Search	31.9%	17.2%	24.1%	26.5%	26.6%
Direct	20.2%	33.7%	35.1%	31.5%	32.6%
Social	14.9%	27.9%	17.1%	15.3%	14.7%
Email	0.8%	1.5%	0.5%	0.7%	0.6%
Paid Search	0.1%	0.5%	0.6%	0.5%	0.3%

Google aggregates all social sources into a single source type, but we drill down another layer to see which social sources are driving traffic. Facebook remains overwhelmingly dominant, accounting for 93% of all social traffic. However, Instagram (and Instagram stories) continue to gain prominence, collectively making up 6% of 2023 social traffic.

Social Sources

Source	June 2019	June 2020	June 2021	June 2022	June 2023
Facebook	96.6%	95.9%	95.4%	93.6%	92.6%
Instagram	1.6%	1.6%	0.8%	4.2%	4.6%
Instagram Stories	0.4%	1.4%	2.4%	0.8%	1.5%
Twitter	0.7%	0.7%	0.6%	0.6%	0.6%
Other	0.7%	0.4%	0.8%	0.8%	0.7%

Social Interactions are how Google Analytics defines the connection between social media and conversions. Contributed social conversions are interactions that were followed by a conversion, but not immediately. A last interaction social conversion is when the conversion happens immediately. The impact of social media referrals and conversions has declined since the social media heyday of 2020.

Social Value

Social Value	June 2019	June 2020	June 2021	June 2022	June 2023
Contributed Social Conversions	8.1%	20.5%	9.9%	8.4%	7.2%
Last Interaction Social Conversions	3.9%	11.0%	5.7%	4.8%	4.1%

Takeaways

- Organic Search drives more than a quarter of all traffic. If you aren’t already using an SEO-optimized RunSignup race website, spend time on an SEO review to ensure you’re showing up in local searches.
- Referral sources expand your reach and contribute 24% of all website views. While many large race calendars automatically add RunSignup events, expand your reach by making sure you seek out local calendars via running clubs, running stores, timers, and local media.
- While social media continues to contribute to website views and registrations, its importance has declined post-pandemic. Focus your financial resources on the most proven social source, Facebook, but take the time to explore newer social media options to reach new (and younger) participants.

4.6 RaceInsights

RaceInsights, RunSignup’s integrated analytics engine, tracks every click, registration, and transaction on each race’s website and analyzes the sources to quantify the impact of marketing efforts. Our aggregate data shows that the largest source of registration is direct traffic to a race’s website, whether that is ScottCoffeeRun.com or RunSignup.com/ScottCoffeeRun. Additional sources of registration are shown below.

Source of Transactions

After some pandemic-related variation, transaction sources in 2023 look similar to 2019. The top three sources of transactions include:

- **RunSignup affiliates** (such as RunningInTheUSA.com or HalfMarathons.net) account for 22% of transactions. Affiliates automatically populate races via the RunSignup API, but races can also seek out local event calendars to expand their reach.
- **Google searches** account for another 20% of transactions. This demonstrates the need to have an SEO-optimized website that’s easily found based on event and location data.
- **Email marketing** from RunSignup’s email accounts for 16.8% of all transactions. We anticipate this will increase as more events take advantage of free email.

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

Additionally, RaceInsights only reports emails sent from the RunSignup platform (with other emails recorded as direct traffic), so the true number of transactions from emails likely far exceeds the 17% reported.

20% of Transactions Came from Google
17% of Transactions Came from RunSignup Email

Source	2019	2020	2021	2022	2023
Google	22.1%	13.2%	19.2%	19.6%	20.2%
Email	16.8%	8.6%	11.4%	16.3%	16.8%
Facebook	7.3%	20.3%	8.8%	7.1%	6.1%
RunSignup Affiliates	22.4%	11.5%	15.2%	21.8%	22.4%
Bing	1.3%	0.6%	0.9%	1.0%	1.2%
Yahoo	0.6%	0.4%	0.4%	0.5%	0.5%

Takeaways

- Email is still powerful. If you’re promoting your event on a tight marketing budget, free emails can go a long way towards spreading the word and prompting sign ups.
- RunSignup affiliates like race calendar websites are also an increasing driver of registrations. While many known race calendars automatically add events from RunSignup, don’t neglect smaller referral sources. Seek out local calendars with running clubs, running stores, and timers and make sure your event is included anywhere runners are looking for their next event.



“We look to past events to plan for future years and we also pull a lot of different reports. For instance, the fundraiser report so we can see who has achieved fundraising incentives and what fundraiser swag they get, and we pull financial reports to see manual donations. We try to have everything run through GiveSignup as much as possible to keep all that information in one place.”

-Allie K,
Red Shoe Shuffle Run and Walk



05 Give Trends

Give Trends

Key Findings and Trends

- High dollar donations bring in real money for your cause. In 2023 **16.2% of donation dollars came from donations of more than \$500** despite making up just 0.6% of total donations made. On the other hand, people are most likely to donate small amounts with **40.2% of donations coming in for less than \$10.**
- Peer to peer fundraising boosts donation dollars. On average, **events with peer to peer fundraising raised 748% more than those with simple donations only.**
- The simplest way to grow donation dollars is to enable a checkbox donation at checkout. This feature **increased the amount raised to \$3,735 compared to just \$986 raised when there is not a donation prompt in checkout.**
- Peer to peer fundraising is a powerful way to earn revenue through events. But peer to peer fundraising events also vary widely. Peer to peer fundraising events with **a few super-engaged fundraisers can see them raise an average of \$9,840.65,** while events that require everyone to be a fundraiser regardless of their engagement level can raise just \$92.37 per fundraiser.

Conclusions and Recommendations

- Setup your donation options to appeal to a wide range of donors. Add donation levels that are appropriate for every donor, from less than \$10 to more than \$1,000. To further prompt action, add descriptive names that make the impact of the donation come to life.
- Peer to peer fundraising is a boon to fundraising events. Cultivate your supporters and help them become top fundraisers through financial and digital rewards throughout the fundraising process. For your most ambitious fundraisers, personal reach-outs may be required.
- Provide multiple opportunities for participants to donate, including as standalone donations outside of registration, during the registration process and at checkout via checkbox. Even if participants skip through the registration path quickly, they may still be willing to add a small donation in the final step if given a final, simple prompt.
- Evaluate the goals of your fundraising event to determine the best setup of your peer to peer fundraising. Regardless of what you choose, give fundraisers support in the form of tutorials, suggested language, and multiple options to share their fundraising pages on social media.

5.1 Donations

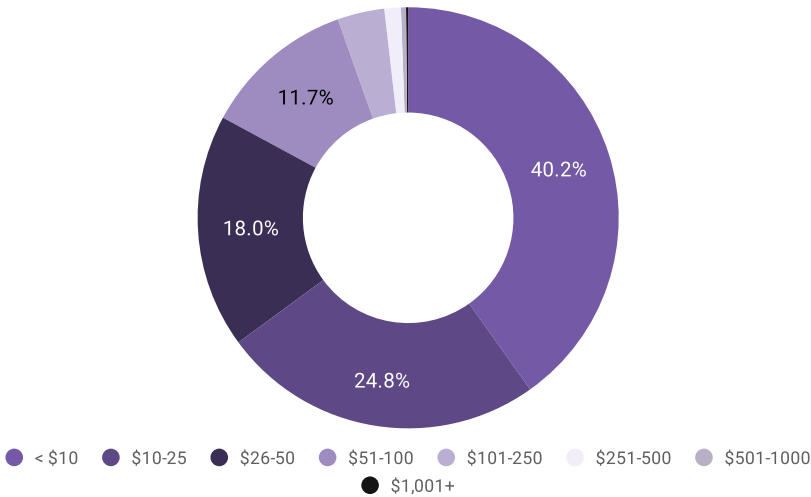
The data over the last five years shows that people are giving more. We investigated the dollar amount of donations on our platform by both the number of donations in a specific range and the total value of those donations. The percentage of donations under \$10 has fallen from 46% to 40%. There were also slight increases in the percentage of donations made for over \$100.

66% of Donations Were for \$25 or Less Making Up 18% of Total Donation Dollars in 2023

Number of Donations by Dollar Amount

Amount of Donation	2019	2020	2021	2022	2023
<\$10	46.0%	47.8%	45.3%	41.6%	40.2%
\$10-\$25	24.8%	24.2%	23.6%	24.5%	24.8%
\$26-\$50	16.2%	15.8%	16.5%	17.5%	18.0%
\$51-\$100	9.2%	8.8%	10.2%	11.3%	11.7%
\$101-\$250	2.7%	2.4%	2.9%	3.4%	3.6%
\$251-\$500	0.8%	0.8%	1.0%	1.2%	1.3%
\$501-\$1,000	0.2%	0.2%	0.3%	0.3%	0.4%
\$1,001+	0.1%	0.1%	0.1%	0.1%	0.2%

Number of Donations by Dollar Amount in 2023

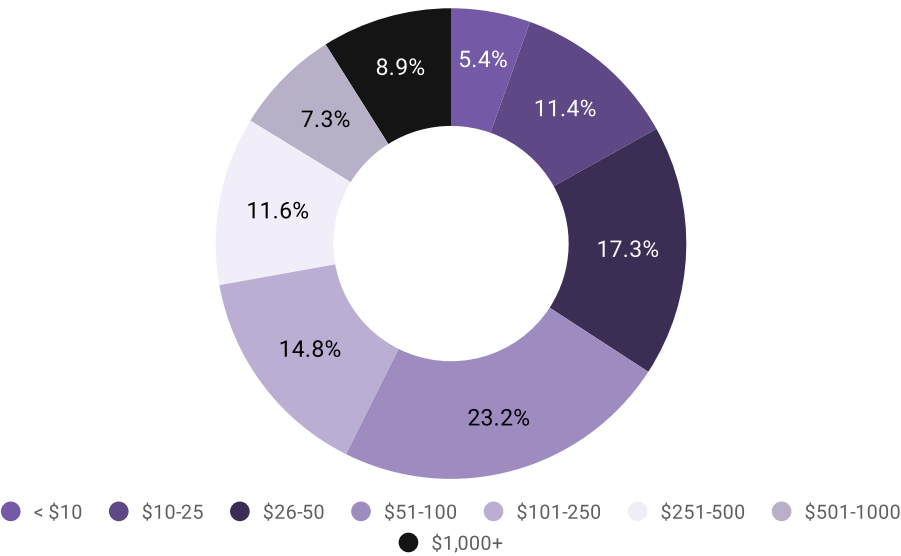


Despite the slight decline of small dollar donations, the majority of people still give less than \$25 dollars. That said, small donations do add up: in 2023 66% of donations were under \$10, but made up 18% of total donation dollars. On the flip side, just 0.6% of all donations were for more than \$500, but that small group made up an impressive 16% of all donation dollars.

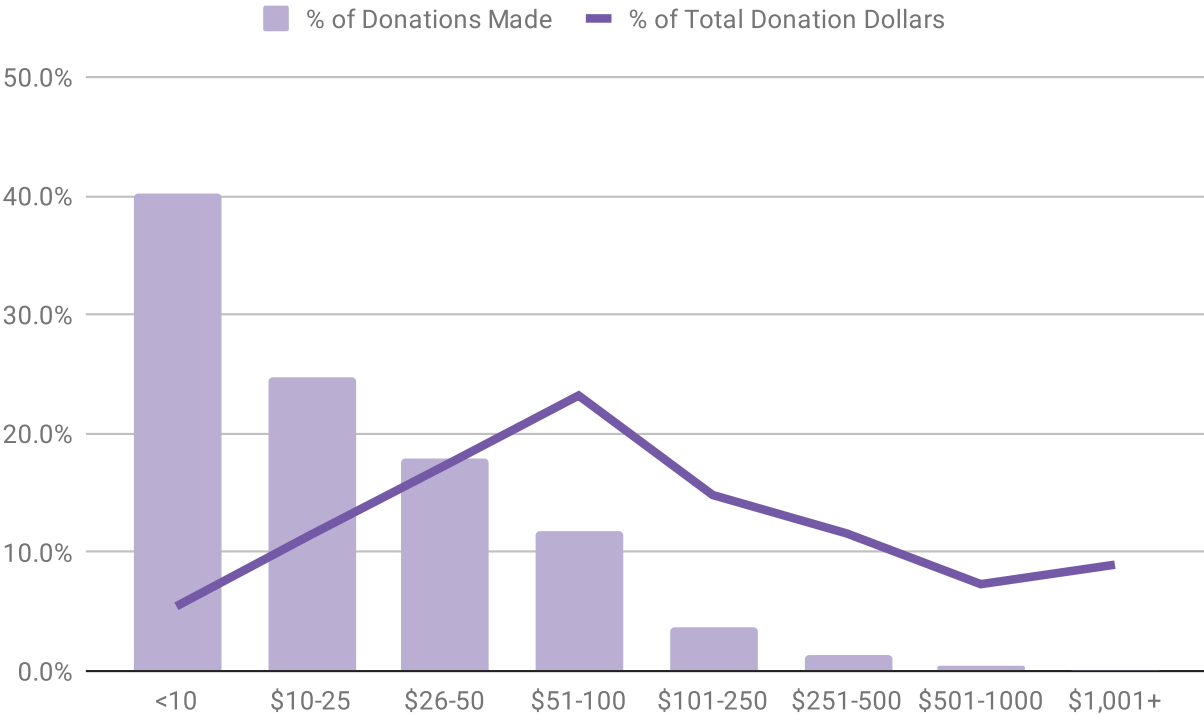
Total Value of Donations by Dollar Amount

	2019	2020	2021	2022	2023
<\$10	7.5%	7.6%	6.4%	5.7%	5.4%
\$10-\$25	14.5%	15.3%	12.9%	11.9%	11.4%
\$26-\$50	19.7%	20.4%	18.7%	17.7%	17.3%
\$51-\$100	23.3%	23.7%	24.0%	23.7%	23.2%
\$101-\$250	14.5%	13.1%	14.2%	14.8%	14.8%
\$251-\$500	9.8%	9.6%	10.8%	11.5%	11.6%
\$501-\$1,000	5.5%	5.5%	6.6%	7.1%	7.3%
\$1,001+	5.2%	4.9%	6.3%	7.6%	8.9%

Total Value of Donations by Dollar Amount in 2023



% of Donations Made vs. % of Total Donation Dollars



28% of Donation Dollars Came from Donations of \$250+
Even Though Just 1.9% of Donations Were for \$250+

Takeaways

- Meet donors where they are. A single \$10 donation may not go very far, but the cumulative impact of thousands of \$10 donations is significant. Make sure your low-dollar donors still feel like they’re making a difference by including a low-dollar donation option and an automatic thank-you email.
- Ask for more. While the majority of your donors give small amounts, high dollar donations do go far. In 2023 less than 2% of donors contributed more than a quarter of all donation dollars through donations of \$250 or more.
- Make donations tangible by setting donation levels based on real-world examples of the impact to your organization. A donor may give an extra \$20 when they can visualize the actual difference a little more money can make.

5.2 Fundraising & Donation Options

- There are three basic ways a race can raise more on RunSignup:
- Simple Donation option during and outside of registration
 - Easy checkbox on the checkout page (with a pre-set donation amount)
 - Peer to Peer Fundraising (where participants raise money from their own community)

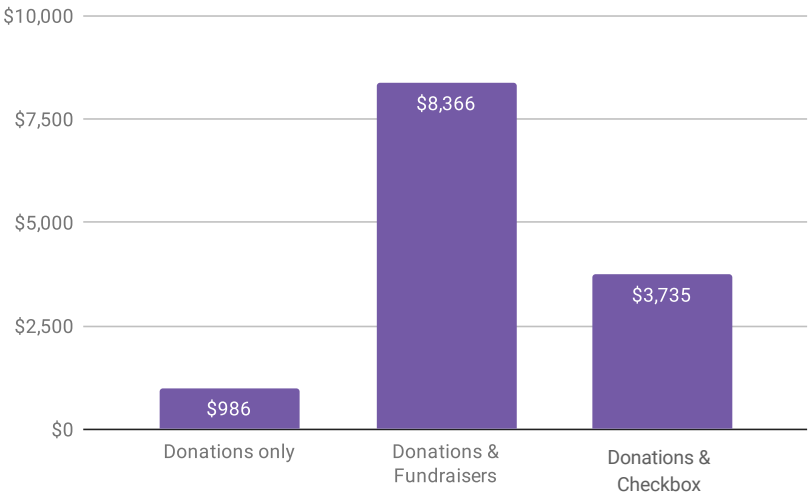
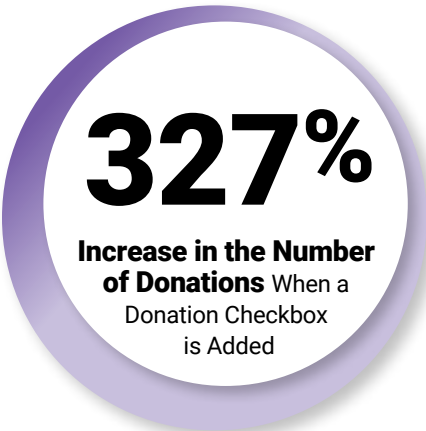
Among the 21,000+ races that enabled some type of donation collection, those who engaged participants as fundraisers raised significantly more for their cause. On average, races with peer to peer fundraising collected 2.8 times as many donations and raised nearly nine times as much as races that only enabled donations. The personal passion of fundraisers, along with motivating gamification features, makes fundraising a clear winner for nonprofits with engaged supporters.

While peer to peer fundraising provides an opportunity to maximize donations, races that lack the bandwidth to provide guidance to fundraisers have another option to boost revenue. Adding a checkbox option on the checkout page is easy and races that enable it raise markedly more on average than those who only prompt donations via the donate step in registration.

\$8,366 Average Amount Raised by Races with Peer-to-Peer Fundraising
\$3,735 Average Amount Raised by Races with Simple Donations and a Check Box Option
\$986 Average Amount Raised by Races with Simple Donations Only

Money Raised by Fundraising Type

Type of Donations	Average Total Raised by Each Event					% of All Transactions (Including Registrations)				
	2019	2020	2021	2022	2023	2019	2020	2021	2022	2023
Donations Only	\$670	\$969	\$1,011	\$1,020	\$986	4.0%	6.4%	5.5%	4.6%	4.3%
Donations & Fundraisers	\$5,907	\$5,733	\$7,382	\$8,254	\$8,366	7.7%	11.4%	11.6%	10.7%	10.1%
Donations & Checkbox	\$3,186	\$3,037	\$4,178	\$4,735	\$3,735	1.6%	2.4%	2.5%	2.2%	1.9%



Number of Donations by Fundraising Type

Type of Donations	Number of Events					Number of Donations per Event				
	2019	2020	2021	2022	2023	2019	2020	2021	2022	2023
Donations Only	10,505	10,404	11,849	13,459	15,072	27	43	41	37	33
Donations & Fundraisers	2,288	3,116	3,460	3,893	4,191	111	107	121	126	125
Donations & Checkbox	867	1,260	1,291	1,423	1,761	127	172	190	152	108

Races and nonprofits have long had a symbiotic relationship, with participants introduced to new causes and nonprofit supporters joining new events. Despite the ups and downs of the previous 5 years, donations and fundraising continue to hold a central role in the endurance industry.

Takeaways

- If your primary goal is to maximize fundraising dollars, peer to peer fundraising is your best option. However, a successful peer to peer fundraising enterprise doesn't mean just enabling fundraisers and walking away. If you're interested in engaging fundraisers, make sure you have the resources to inspire and support them. If you can do that, you may build lifelong advocates for your nonprofit!
- Make fundraising fun. Activate gamification features like milestones and badges and customize the fundraising experience.
- If you're looking to boost donations but know you don't have the ability to truly support fundraisers, enabling the checkbox donation option is simple for you and your donors. The action is easy, but the results are big – races with the checkbox switched on collect from more donors and raise more than 3 times as much.

5.3 Facebook Fundraising

RunSignup first introduced the Facebook Fundraiser Integration in July of 2019 and it rapidly became a prized resource for fundraising events. In 2023, \$786,080.84 were raised on Facebook through the integration.

However, changes at Meta in 2022 led to reduced confidence in the integration. In 2023 Meta announced they would no longer cover payment processing fees for donations and would be switching to paypal for donation payment processing. Some customers continue to use the integration successfully, but we have seen reduced usage of the integration over the last two years.

We have seen our customers using the integration gain tons of value from it and hope Meta will continue to support their success in the future. In the meantime, some caution is recommended. However, due to the overhead for fundraisers to sync their fundraiser with Facebook, the vast majority (92%) of donations collected through the integration were made on RunSignup.

Percent of Donations via Facebook RunSignup

Type of Donations	2019 % of Donations	2020 % of Donations	2021% of Donations	2022 % of Donations	2023 % of Donations
Facebook	6.4%	15.0%	13.1%	10.7%	7.6%
RunSignup	93.6%	85.0%	86.9%	89.3%	92.4%



To understand the impact RunSignup’s free Facebook Fundraiser Integration can have for individual fundraisers, we reviewed the top 100 events using the integration in 2023 (those with the highest volume of donations). On average, connected fundraisers raised 121% more than those who only raised money via RunSignup.

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

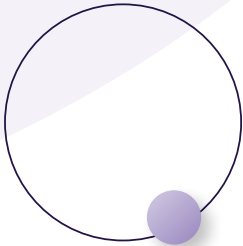
Top 100 Events with Facebook Fundraising Activated

	2020	2021	2022	2023
Average # Donations on Facebook	5.1	6.7	5.2	3.8
Average Amount Raised on Facebook	\$239.53	\$372.30	\$277.72	\$211.26
Average # Donations on RunSignup	1.3	1.2	0.9	1.0
Average Amount Raised on RunSignup	\$91.51	\$115.09	\$100.19	\$95.59

Takeaways

- If your primary goal is to maximize fundraising dollars, peer to peer fundraising is your best option. However, a successful peer to peer fundraising enterprise doesn’t mean just enabling fundraisers and walking away. If you’re interested in engaging fundraisers, make sure you have the resources to inspire and support them. If you can do that, you may build lifelong advocates for your nonprofit!
- Make fundraising fun. Activate gamification features like milestones and badges and customize the fundraising experience.
- If you’re looking to boost donations but know you don’t have the ability to truly support fundraisers, enabling the checkbox donation option is simple for you and your donors. The action is easy, but the results are big – races with the checkbox switched on collect from more donors and raise more than 3 times as much.

5.4 Peer to Peer Fundraising Results



The big questions around peer to peer fundraising always center on how many people will fundraise for them and how much each of them will raise. Unfortunately, that’s not really a question our data can answer – there is just too much variability in fundraising events.

Incentives like fundraising minimums and fundraising rewards, settings like requiring all participants to be fundraisers, and the enthusiasm of a nonprofit’s built-in base all impact fundraising results considerably.

However, to give events some idea what the possibilities of peer to peer fundraising are, we reviewed a sample of 50 of the top fundraising events in 2023.

Individual Fundraisers

Individual fundraisers raised an average of \$145.50, collecting an average of 1.3 donations. But if you isolate specific events you see how much variation exists. For example, an event with less productive fundraisers had more than 20,000 fundraisers, but many did not get any donations and collectively raised an average of \$92.50 per fundraiser. On the flip side, an event with highly productive fundraisers had only 28 fundraisers – but each raised an average of \$9,840.65 through 50.7 donations.

The biggest difference between those extremes is a decision to require (or not) every participant to become a fundraiser. For some events, it’s valuable to widely spread the idea of fundraising by making everyone a fundraiser. For others, it’s preferable to apply a high level of attention to a small number of fundraisers who make the personal choice to fundraise for the nonprofit.

Performance of Fundraisers Across a Range of Events

	# Fundraisers	Donations per Fundraiser	\$ Raised per Fundraiser
Average	1,592	1.3	\$145.50
Low Productivity Fundraisers	20,031	0.1	\$92.37
High Productivity Fundraisers	28	50.7	\$9,840.65

Fundraising Teams

Fundraising teams allow fundraisers to join forces to meet their goal and can make fundraising more fun. As with individual fundraisers, there’s high variability in the productivity of fundraising teams. The average race had 58 teams with 15.4 team members on each team, with each team raising a total of \$4,555.97 and 47.8% of them reaching their goal. Highly productive teams raised as much as \$13,726.62, while low productivity teams raised just \$657.90.

Like with individual fundraisers, requiring participants to join fundraising teams reduces the per-team revenue. It’s up to the individual race to weigh the benefits of a small number of passionate fundraisers versus a large number of fundraisers of capricious levels of commitment.



Performance of Fundraising Teams Across a Range of Events

	Number of Teams	Fundraisers per Team	% Teams Met Their Fundraising Goal	\$ Raised per Team
Average	58	15.4	47.8%	\$4,555.97
High Productivity Team	11	5.4	63.6%	\$13,726.62
Low Productivity Team	207	14.6	19.5%	\$657.90

Takeaways

- No two fundraising events look the same. Pick your race settings based on the priorities of the race and understand the tradeoffs of having many fundraisers versus a small number of valuable fundraisers.
- Regardless of the setup you choose, fundraisers need guidance and motivation. Include fundraising how-to’s and tips for success and offer multiple rewards to encourage continued engagement. No matter how many (or how few) fundraisers you have, they require help to succeed.



“The nice thing about training our team on [RaceDay Scoring] is it’s very logical and intuitive. It’s easy to go and find things you want to reference and change as you’re timing a race. It’s been pretty easy. I’ve seen timing software that can do what RDS can do, but they were very cumbersome and complex – you need to be a really tech-y guy to make it work. That’s the nice thing about RaceDay Scoring. You don’t have to be a developer to understand it and get it to do all the things you need it to do.”

-Shawn D,
Good Times Event Services



06 RaceDay Trends

RaceDay Trends

Key Findings and Trends

- Race day registrations made up 2.4 of all race registrations in 2023, a total of 9.8% of race week registrations.
- The RaceDay CheckIn App continues to see widespread adoption in 2023 with **33% of events using the RaceDay CheckIn App to check-in a record 39.3% of participants.**
- RaceJoy, the GPS-based runner-tracking app, saw significant engagement in 2023 **with 182,943 spectators tracking 119,823 participants and sending 703,749 cheers.**
- Despite operating with small teams, timers offer a wide breadth of services to the large numbers of races. While **59.3% of timing businesses have just 1 full time employee, 57% of them provide services to more than 50 events each year. And they don't just offer timing, 81.6% of them help races with services beyond timing.**

Conclusions and Recommendations

- RaceDay registrations are inevitable - embrace the last minute revenue bump and make it easier for procrastinators to register. Leave online registration open until the gun goes off and add on-site signage with QR codes and quick text links to encourage participants to skip the line and register on their own mobile devices.
- An efficient check-in process means a line-free experience and happier participants and volunteers. Create configurations and presets for your volunteers that enable them to see all the information they need, while limiting the opportunity for human error.
- Find opportunities to make your race experience more interactive, both on-site and remotely. RaceJoy can help you engage participants and spectators wherever they are – add help resources to your website to make it easy for them to connect.
- Savvy timers are nimble and trusted as industry experts. Diversify your services to expand your market share and build your book of business.

6.1 RaceDay Registration

Anecdotally, we’ve been hearing that procrastination among runners is worsening. For the very worst procrastinators, the RaceDay registrants, that doesn’t appear to be true. In 2023 2.4% of registrations took place on RaceDay, relatively consistent with each prior year (aside from a slight 2020 uptick).

Percent of Registrations on Race Week and Race Day

Year	% of Race Week Registrations on RaceDay	% Total Registrations on RaceDay
2019	9.3%	2.3%
2020	11.8%	3.1%
2021	8.9%	2.2%
2022	9.5%	2.4%
2023	9.8%	2.4%

2.4% of Registrations Were on RaceDay

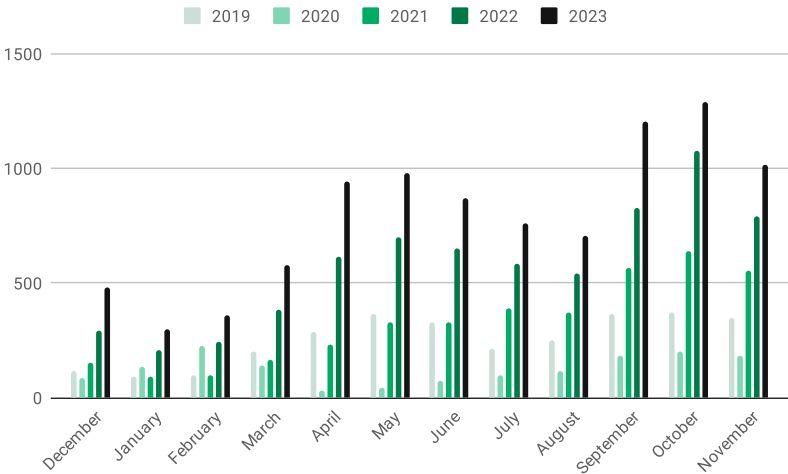
Takeaways

- To maximize participation (and revenue) never close registration. Leave online registration open until the gun goes off, allowing people to register from home before they leave or on their phones from your parking lot. For people uncomfortable registering on their phones, offer on-site kiosks (instead of paper forms) for fast, accurate, syncing with your timing software.
- Get people out on course quickly by limiting the questions required during RaceDay registration to the absolute essentials.
- Procrastination is a revenue opportunity. Increasing the cost for late registrations encourages earlier commitment while providing a revenue boost from the late deciders.

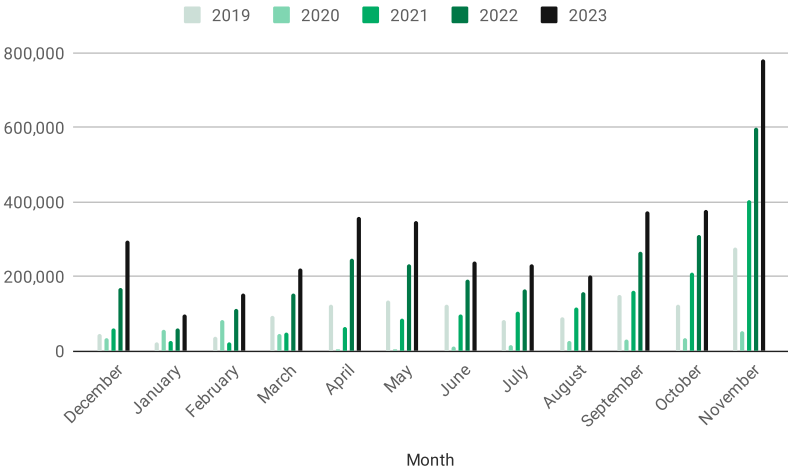
6.2 CheckIn App Usage

The RaceDay CheckIn App has seen continued increases in usage, especially since the release of a new and improved version in 2021. In 2023, one third of all races used the app to check-in 39% of all registered participants.

Races Using the RaceDay CheckIn App



Participants Checked In by the RaceDay CheckIn App

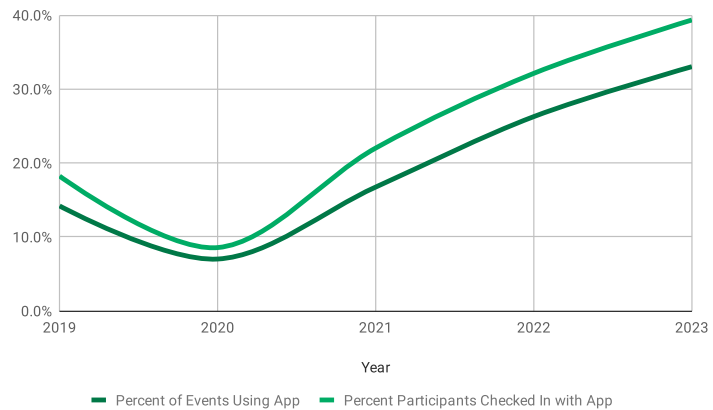


The RaceDay CheckIn App is often associated with large races, and it is true that the RaceDay CheckIn App is often used to check-in many people efficiently – the largest race using the RaceDay CheckIn App in 2023 checked in more than 21,000 participants. However, small races also appreciate technology: the average race using the CheckIn App had just 389 participants.

CheckIn App Usage

Year	Participants Checked in by App	Participants Not Checked In by App	Races Using CheckIn App	Races Not Using the CheckIn App	% Runners Checked In with App	% Races Using the CheckIn App
2019	1,312,363	5,999,659	3038	18161	17.9%	14.2%
2020	403,174	4,310,206	1513	20,089	8.6%	7.0%
2021	1,405,871	4,979,795	3,922	19,508	22.0%	16.7%
2022	2,662,177	5,626,935	6,918	19,419	32.1%	26.3%
2023	3,687,449	5,686,569	9486	19241	39.3%	33.0%

Percent of Runners and Events Using App



21,196 Participants Checked In By Largest Event Using the RaceDay CheckIn App But

5,000 Races Also Used the App to Check In Fewer Than 200 Participants

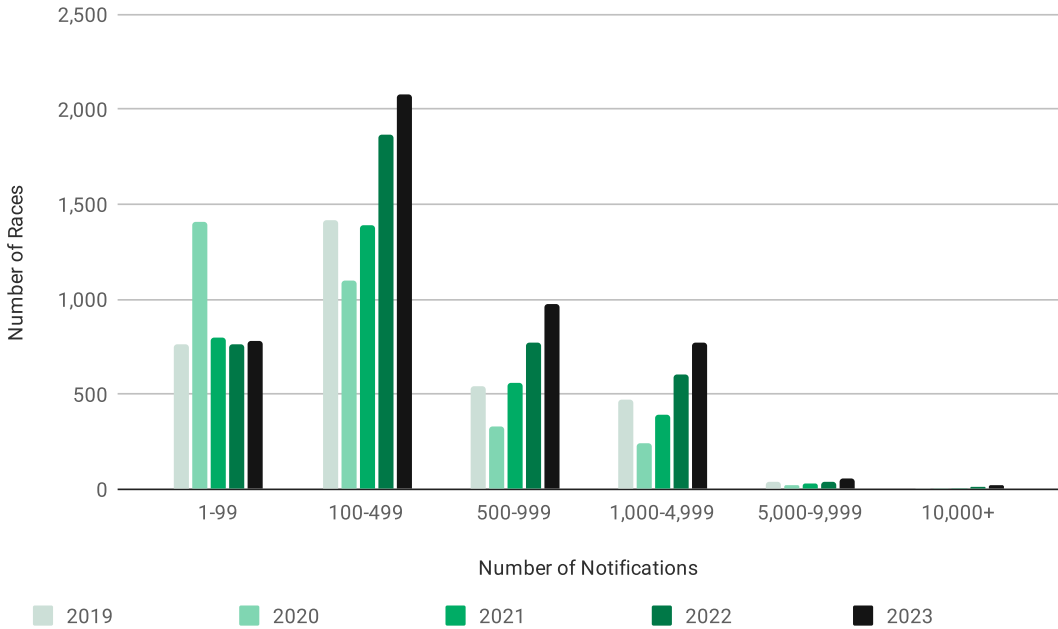
For the third year in a row, in the 2023 Timer Survey (see sections 6.6-6.8), responding timers voted the RaceDay CheckIn App as the RaceDay product they were **most** happy with.

Takeaways

- RaceDay should be easy, no matter how large (or small) your event. Participants are increasingly familiar with the process of checking into events via a QR code, making the process even simpler. Use replacement tags in your confirmation email and pre-race emails to make sure it's easy for everyone to access their QR code for check-in.
- Make check-in even easier on your volunteers by allowing them to use their own devices. Bringing extra backup devices and a power supply ensures limited technical support is needed!
- Save money in 2024 with dynamic bib assignment through the RaceDay CheckIn App. Dynamic bib assignment reduces pre-race overhead and saves chip costs, and the app's label printing capabilities mean you can still add personalized labels to your bibs.

6.3 Scored Results Notifications

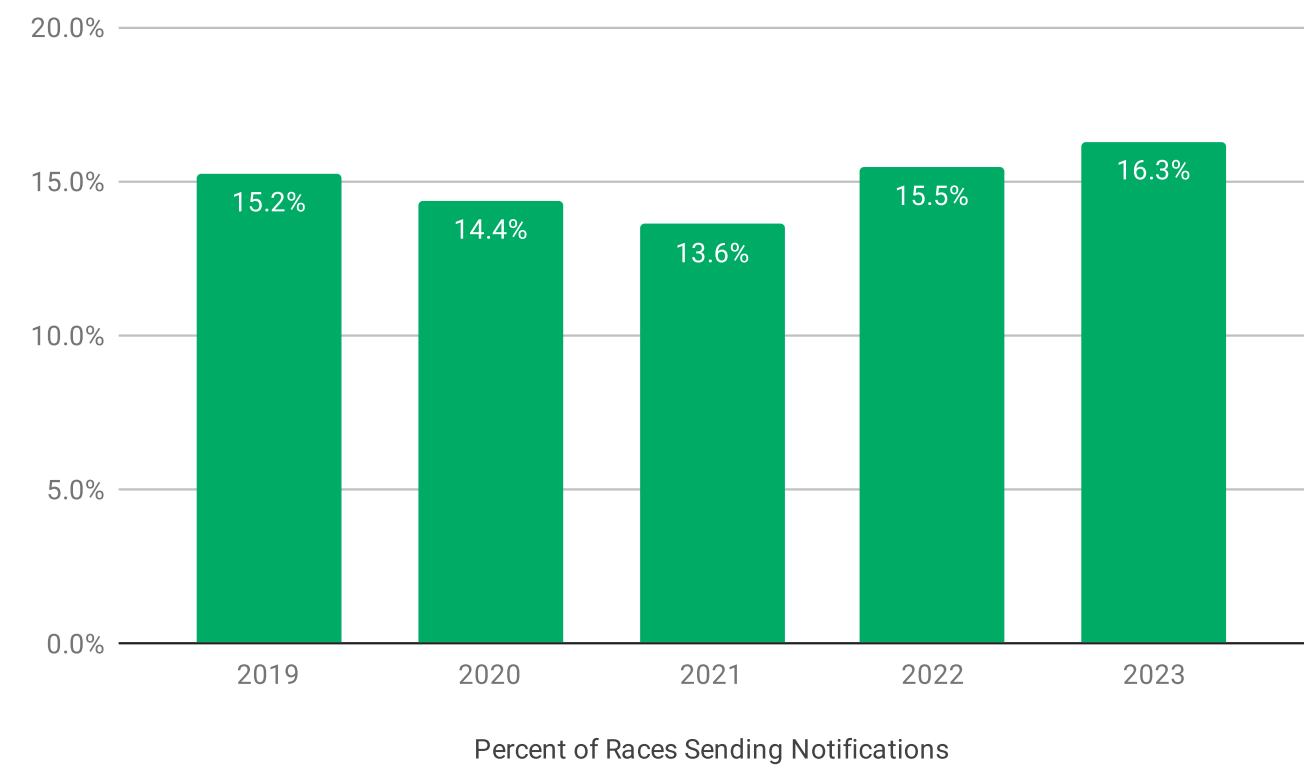
More races sent results notifications in 2023 than in any year prior, with more than 4,500 races providing notifications. Over the last few years, the number of large events offering notifications has increased (18 races in 2023 sent more than 10,000 notifications), while the number of very small races sending notifications has remained relatively steady (778 races sent fewer than 99 notifications). It's clear that notifications are one of the core race day technologies that are accessible to races of all sizes.



Number of Notifications	2019 # of Events	2020 # of Events	2021 # of Events	2022# of Events	2023 # of Races
10,000+	5	3	3	12	18
5,000-9,999	42	20	33	43	60
1,000-4,999	468	244	392	606	773
500-999	543	330	563	773	974
100-499	1,415	1,097	1,394	1,798	2,075
1-99	759	1,408	800	766	778

The percentage of total races utilizing notifications rose slightly in 2023, with just over 16% of all races taking advantage of the technology. While there was a slight decline in 2020 with fewer virtual races offering notifications, the share of races that provide them has remained relatively constant at 14-16% each year.

Percent of Races Sending Notifications



Takeaway

- Races are all about providing an experience to participants and spectators (even those “watching” from home). Notifications are an easy way to engage spectators with the race course. To offer an experiential element to participants and spectators of all technology comfort levels, offer a combination of results notifications and live GPS tracking.

6.4 The Race Director

The Race Director Usage

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

5.2

Million Participants
Timed by The Race
Director

Races & Participants Timed by The Race Director

	2019	2020	2021	2022	2023
Total Races	15,340	5,078	10,259	13,676	13,578
Total Participants	6,438,967	1,452,755	3,409,159	4,925,052	5,150,802
Average Race Size	420	286	332	360	379

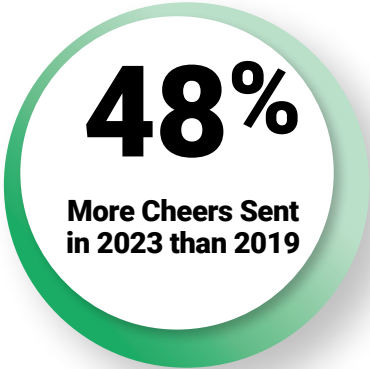
Takeaway

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

6.5 RaceJoy GPS Tracking

RaceJoy usage fell very slightly in 2023 after multiple years of record-setting usage. However, usage and engagement remains much higher than pre-pandemic. While 2020 and 2021 had more races using the app to enhance virtual experiences, engagement through the app has grown with more spectators, progress alerts, and cheers sent.

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



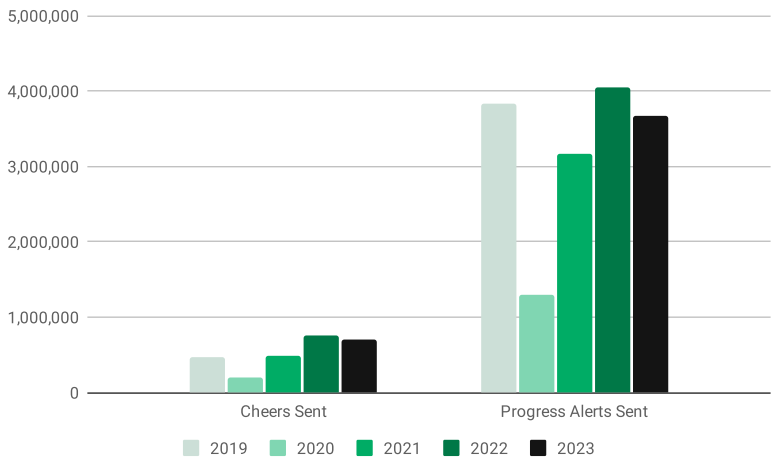
RaceJoy Usage

RaceJoy Usage	2019	2020	2021	2022	2023	Change 2019-2023	Change 2022-2023
Races	410	1,097	1,215	829	781	90.5%	-5.8%
Tracked Participants	108,451	165,373	142,650	128,194	119,823	10.5%	-6.5%
Spectators	162,109	87,038	162,735	196,150	182,943	12.9%	-6.7%
Progress Alerts	3,823,954	1,303,158	3,168,372	4,052,806	3,675,122	-3.9%	-9.3%
Cheers Sent	477,053	198,375	479,363	755,052	703,749	47.5%	-6.8%

RaceJoy Usage: Tracked Participants and Spectators



RaceJoy Usage: Cheers and Progress Alerts Sent



Takeaways

- The key to returning participants? A better race experience. Implement runner tracking tools like RaceJoy that increase spectator engagement and expand the race experience to include remote participants cheering from home.
- A fun, supportive, race experience is key to welcoming newer runners. Offer technology that makes the race more fun and allows runners to bring their community along on the run.
- Link to RaceJoy how-to's on your website and schedule RaceJoy reminder emails to ensure that your participants and their spectators can get more out of the app on race day.

2023 Timer Survey Purpose & Methodology



Purpose:

RunSignup issues an annual timer-specific market survey to help us understand the unique needs of timers. This information is used to provide industry insights to timers and helps guide our technology roadmap. In 2023 we looked at:

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

Survey Collection

This survey was issued in November of 2023. Timers were reached for response through multiple channels, including email (to RunSignup’s email list), partner organizations, RunSignup’s social media and Facebook groups targeting timers.

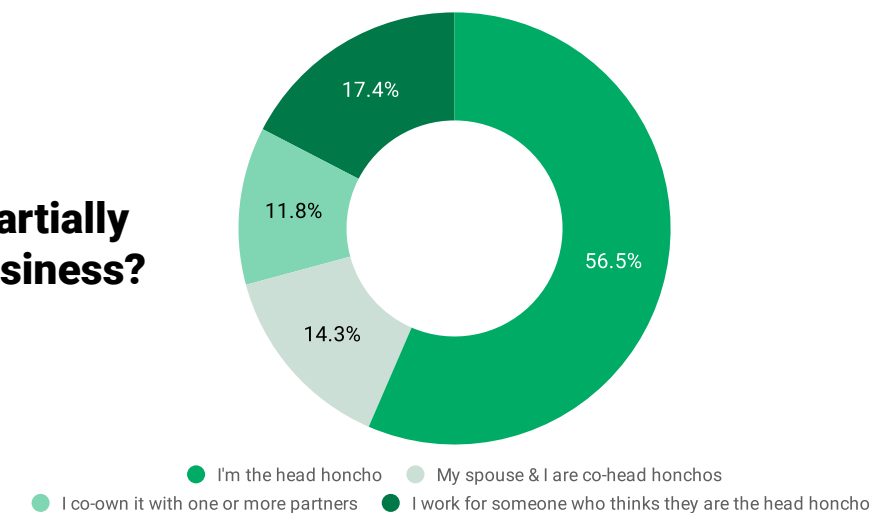
While efforts were made to reach timers outside the RunSignup network, it can be assumed that RunSignup users are overrepresented in the sample, influencing answers about software and hardware choices.

list **161 Survey Responses**

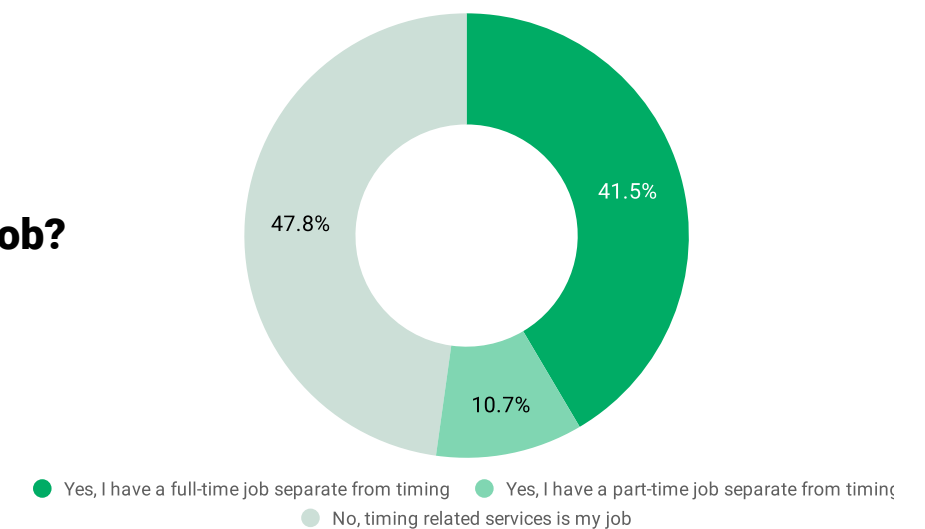
6.6 The Timing Business

This set of questions establishes the ownership, staffing patterns, and scope of timing businesses. It’s clear that timing businesses require passion: while 83% of respondents indicated that they own part or all of the timing business, a majority (52%) of them also work at least a part-time job outside of timing.

Do You Own or Partially Own a Timing Business?



Do You Have Another “Real” Job?



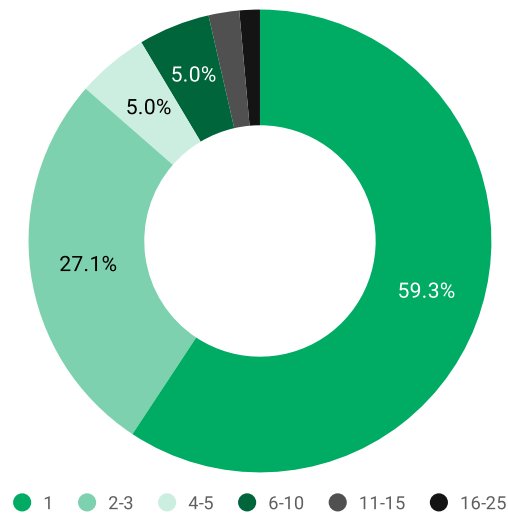
52% of Timers Also Work a Part or Full-Time Job

A majority of respondents still indicate they work at least part time in addition to their timing role. However, 2023 respondents included a higher percentage of full-time timers than any previous year. While it’s possible that this variation is due to differences in the pool of respondents, it also appears that some timers who picked up outside jobs due to COVID-19 have returned to full-time timing.

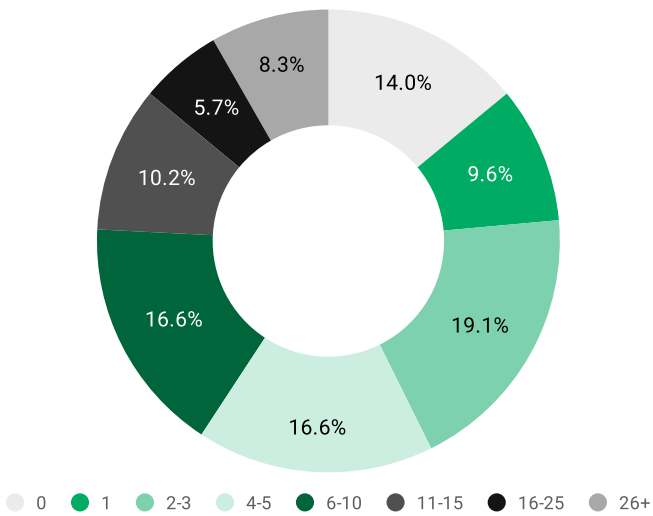
	2019	2020	2021	2022	2023
Yes, I have a full-time job separate from timing	46.5%	43.8%	42.5%	50.9%	41.5%
Yes, I have a part-time job separate from timing	12.2%	8.1%	10.7%	11.8%	10.7%
Because of COVID-19, I had to get another job	-	5.0%	1.7%	0.9%	-
No, timing related services is my job	41.3%	43.1%	45.2%	36.3%	47.8%

Timing companies employ relatively few full-time employees – in fact, 59% of them have just one full-time employee. Due to the challenging schedules of a timing business, part-time employees and contractors make up a large percentage of on-site timing teams. Nearly a quarter of all timing companies employ more than 10 part-time employees or contractors.

How Many Full-Time Employees Work at Your Timing Business



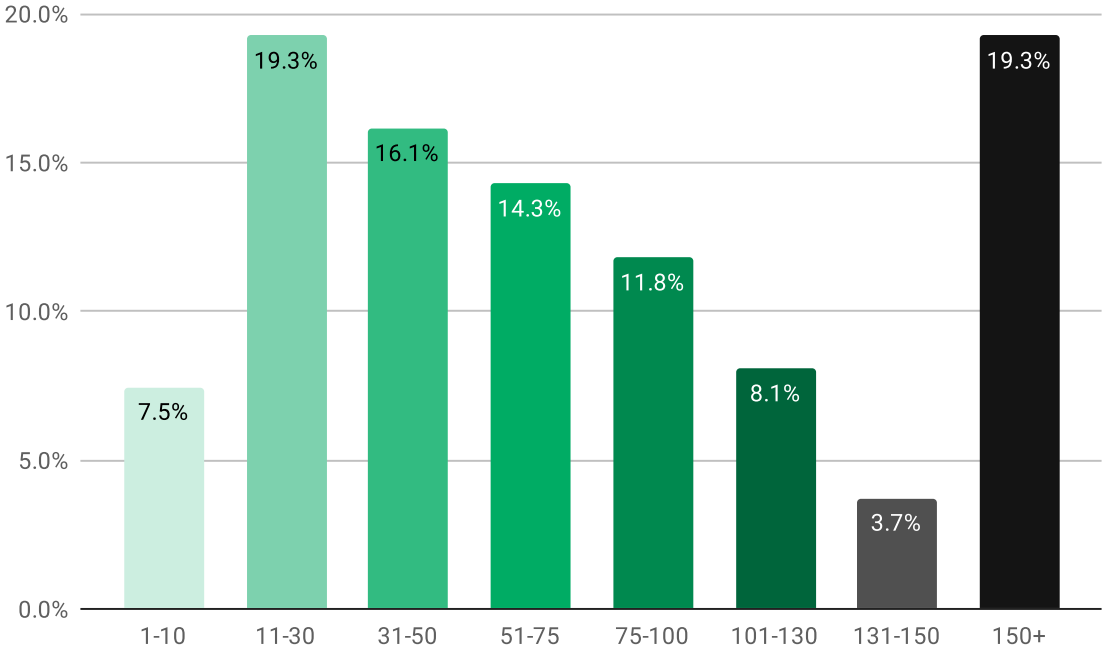
How Many Part-Time Employees Work at Your Timing Business



59% of Timing Businesses Have Just 1 Full-Time Employee

Despite small teams and additional work responsibilities, timing companies are incredibly productive. Most timing companies provide services to dozens (or even hundreds) of events each year. While businesses range widely in scope, an impressive 57% of them support more than 50 events each year.

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



Takeaways

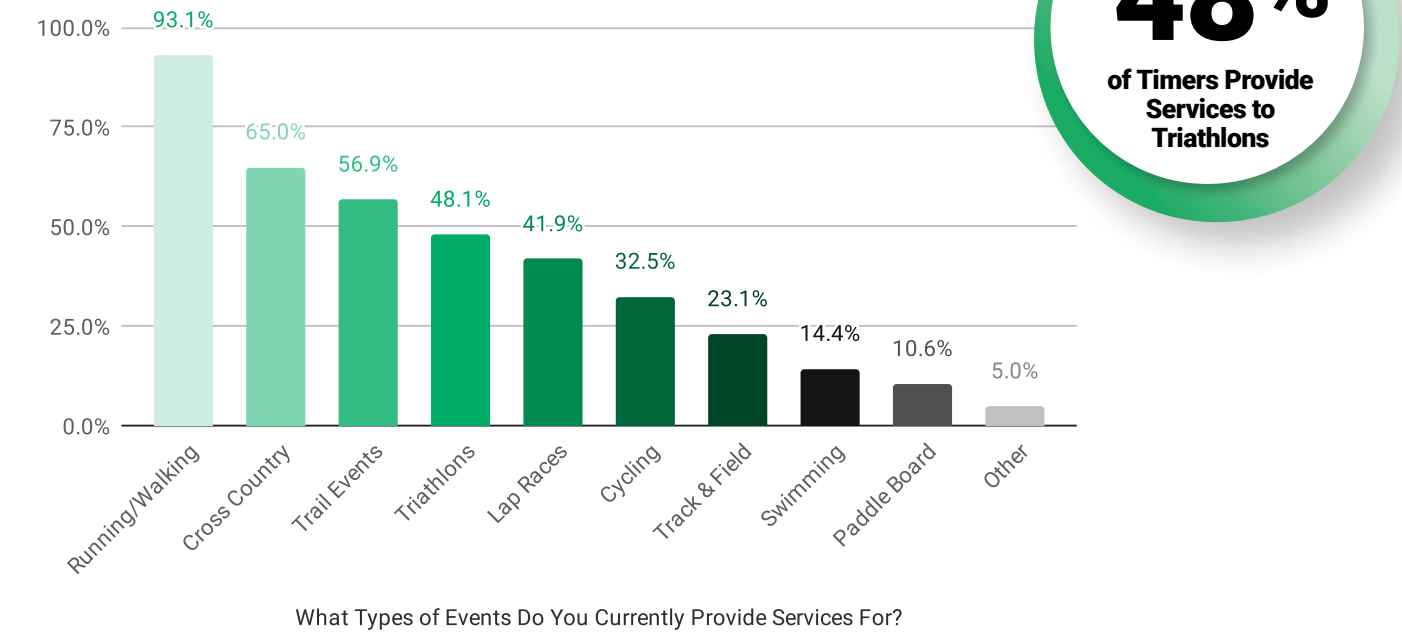
- Despite being **absolutely crucial** to the endurance industry, race timing companies are typically small teams with hands-on owners. These lean crews are complemented by part-time employees and contractors, allowing them to service dozens of races each year.
- The many races serviced by a timing company each year provides them with a wealth of experience and knowledge. Have a question about your race? Ask your timer.



6.7 Event Services

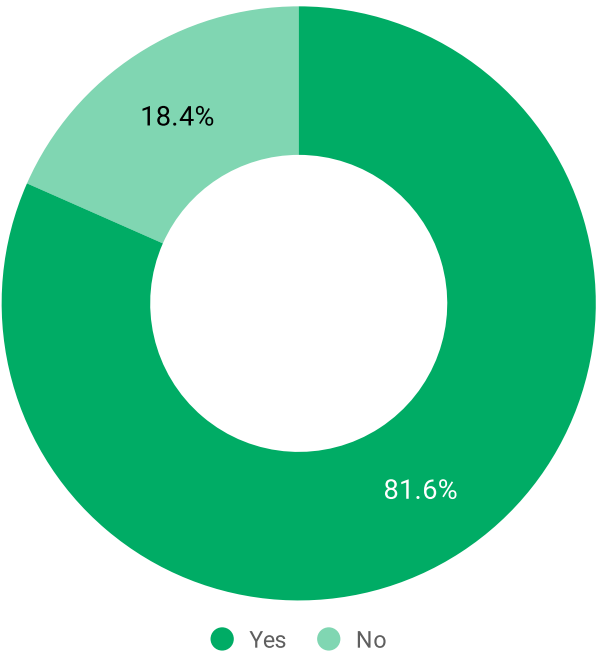
While most timers (93%) provide services for traditional run/walk events (like 5Ks and marathons), timing extends to many other types of events. Cross country, trail events, and triathlons are the next most common, but timers also time non-running events like cycling, swimming, and paddle boarding.

What Types of Events Do You Currently Provide Services For?



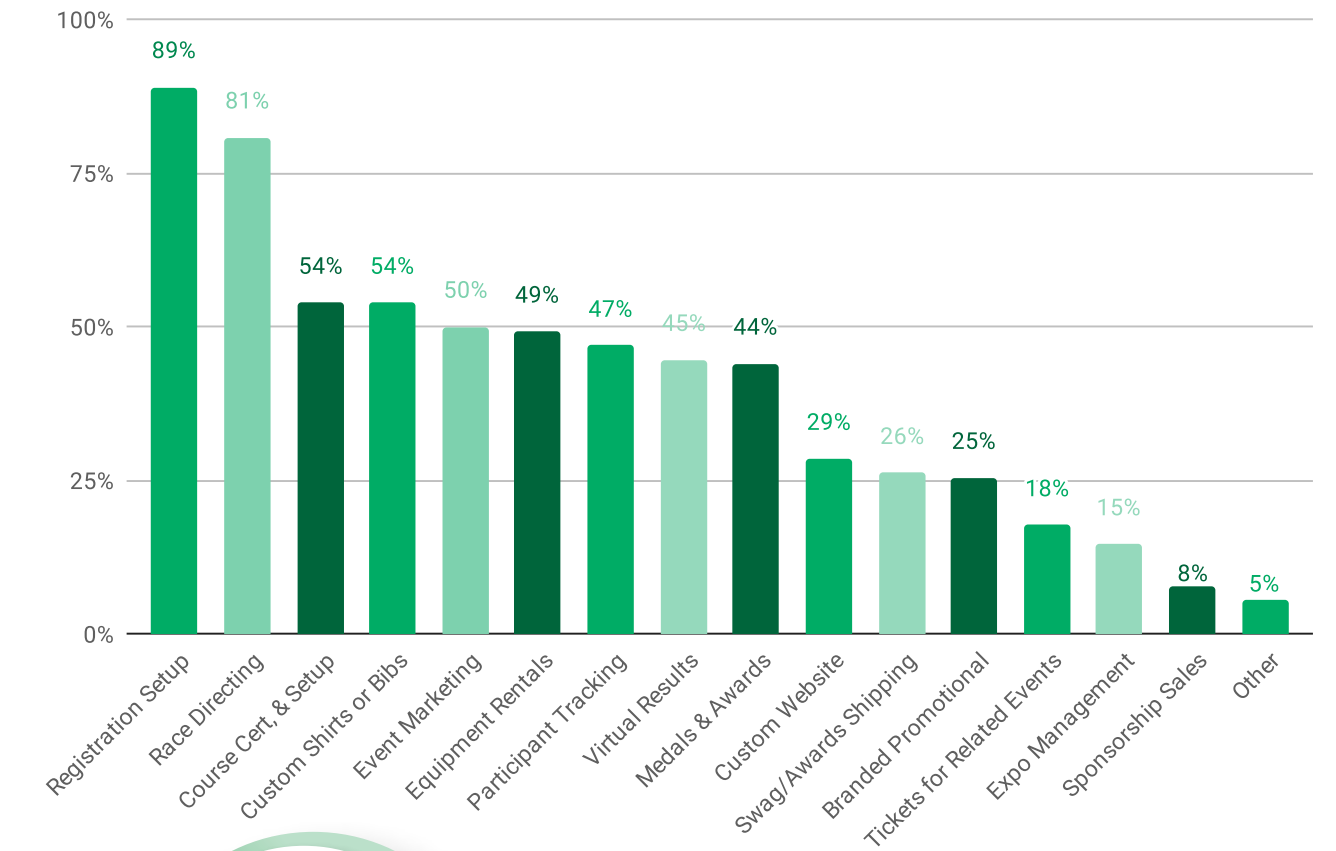
As we've seen each of the last 5 years, the majority of timers (82%) offer services beyond timing. Providing a range of services helps timing companies increase profit margins and provides a competitive advantage.

Do You Provide Services Outside of Timing?



The most common additional services provided by timers include registration setup, race directing, course certification and setup, and custom shirts or bibs.

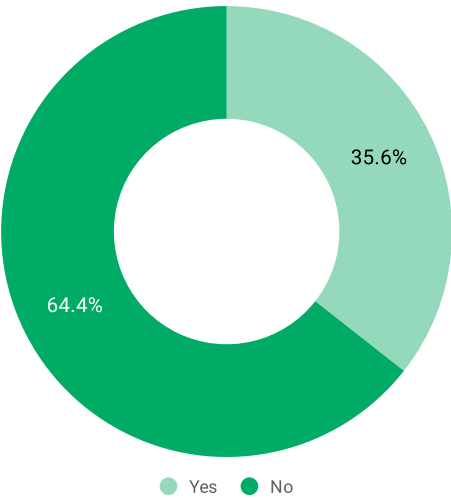
What Other Services Do You Provide?



Timers continue to innovate, with 36% of timers adding additional services or technologies to their 2023 offerings. New service options included LED Video Boards, QR Codes and CheckIn App, and Ticketing.

Did You Start Offering New Services or Technology This Year?

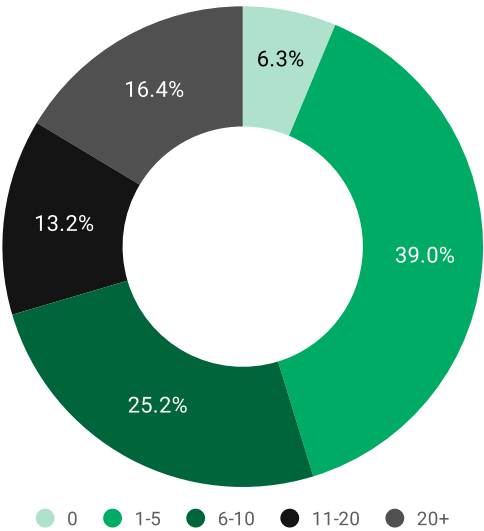
36% of Timers Added New Services or Technologies in 2023



How Many Events Has Your Timing Business Added This Year?

55% of Timers Added More than 5 New Events in 2023

Responding race timers report largely growing businesses, with just 6% reporting that they added no new events in 2023. The majority, 55%, added more than 5 new events within the year.



Takeaways

- Timing companies operate on tight margins, but responding timers indicate that they are growing their businesses. Keep up by diversifying the events you time and adding new services to your roster.
- For race directors evaluating timing companies, look for a timer that’s experienced in a range of race operations and able to provide direction and advice in your process.

6.8 Timing Technology

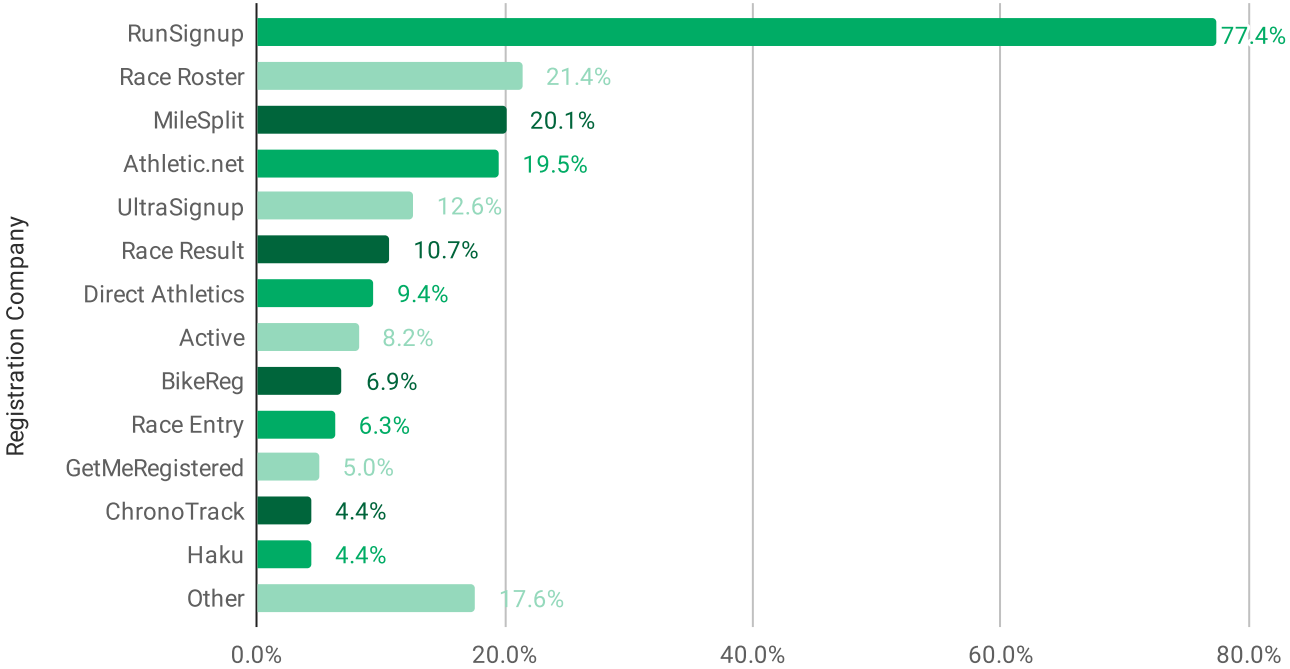
As Section 6.7 suggests, timers are often experts in a range of technologies. Understanding their preferences for registration, timing hardware and software, and runner tracking can provide insight into their priorities.

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

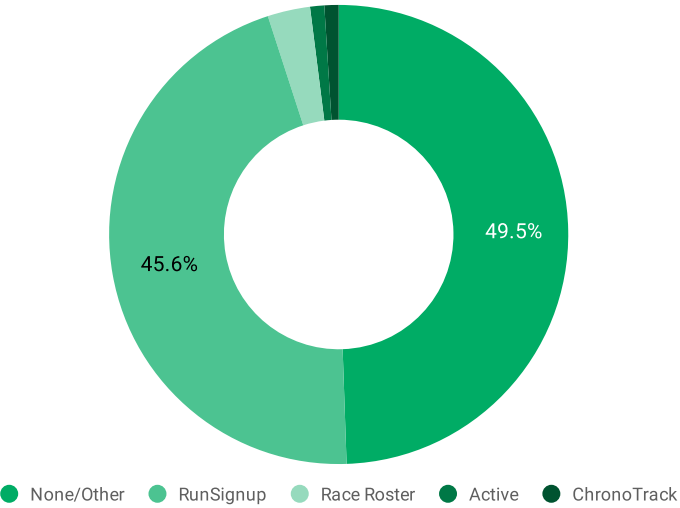
Registration Company

As expected, RunSignup was the most used registration platform by both the timer survey and Race Director users. Most notable, however: the once-extensive registration market has seen considerable consolidation in the last few years, with just 3 providers used by more than 20% of timers.

Registration Platforms Used



% Races by Registration
Company Integration (from
Race Director data)



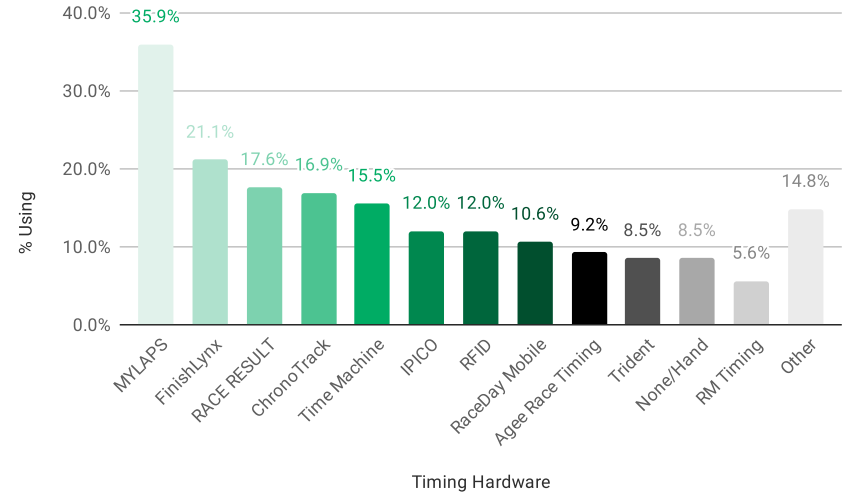
Timing Hardware

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

Race Director Data

Timing Hardware	% Using
RFID	26.1%
MYLAPS	21.1%
IPICO	15.9%
ChronoTrack	10.3%
Trident	9.2%
race result	7.4%
Unknown	5.5%
Custom File	2.2%
None/Other	2.3%

Timer Survey Responses



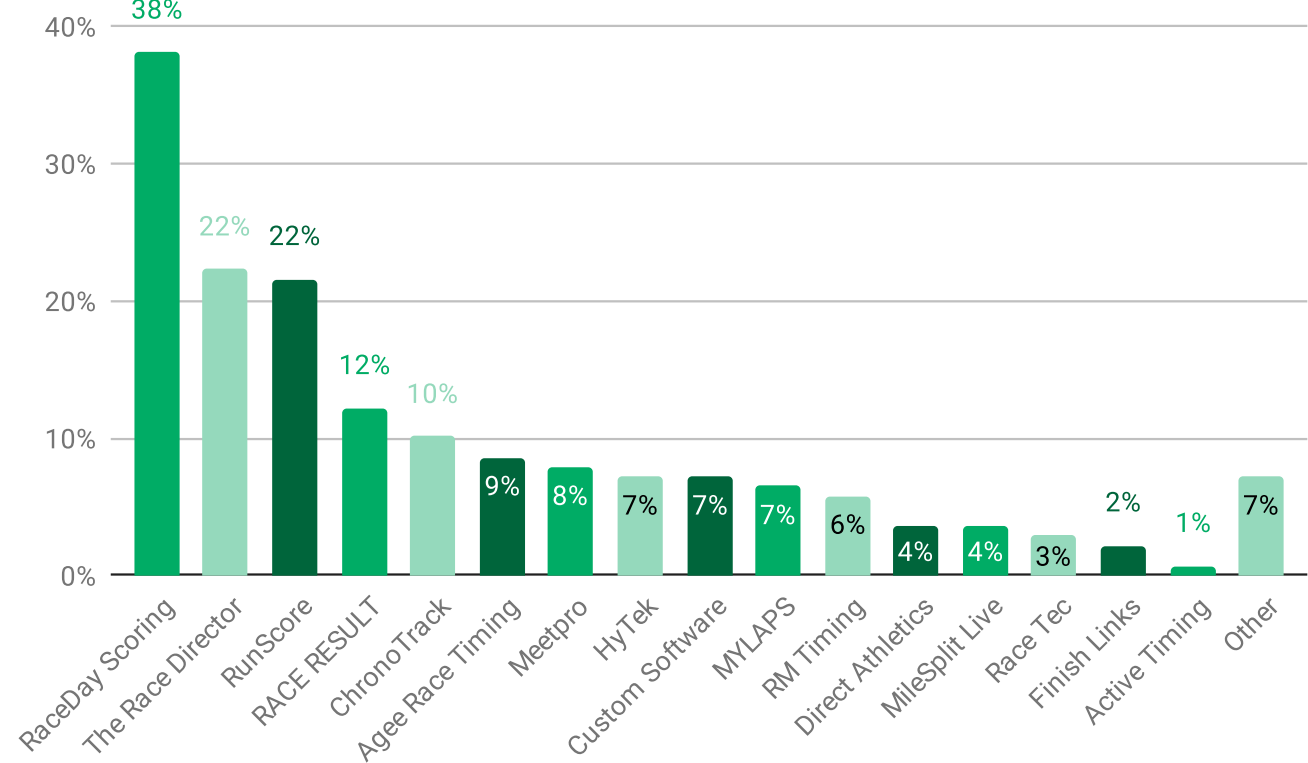
**MYLAPS Hardware Was Used By
36% of Survey Respondents and
21% of Races Scored By The Race Director**

Scoring Software

For years, two scoring software systems dominated the endurance market: The Race Director and RunScore. For the first time in 2023 the most-used software was a next-generation software option, RaceDay Scoring. Additionally, usage of RACE RESULT increased over previous years, making it the fourth most common software option. While the dominance of RunSignup owned software (The Race Director and RaceDay Scoring) is likely impacted by the customer-heavy sample, adoption of RaceDay Scoring is increasing with new timers coming into the industry and the approaching sunset of The Race Director.

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

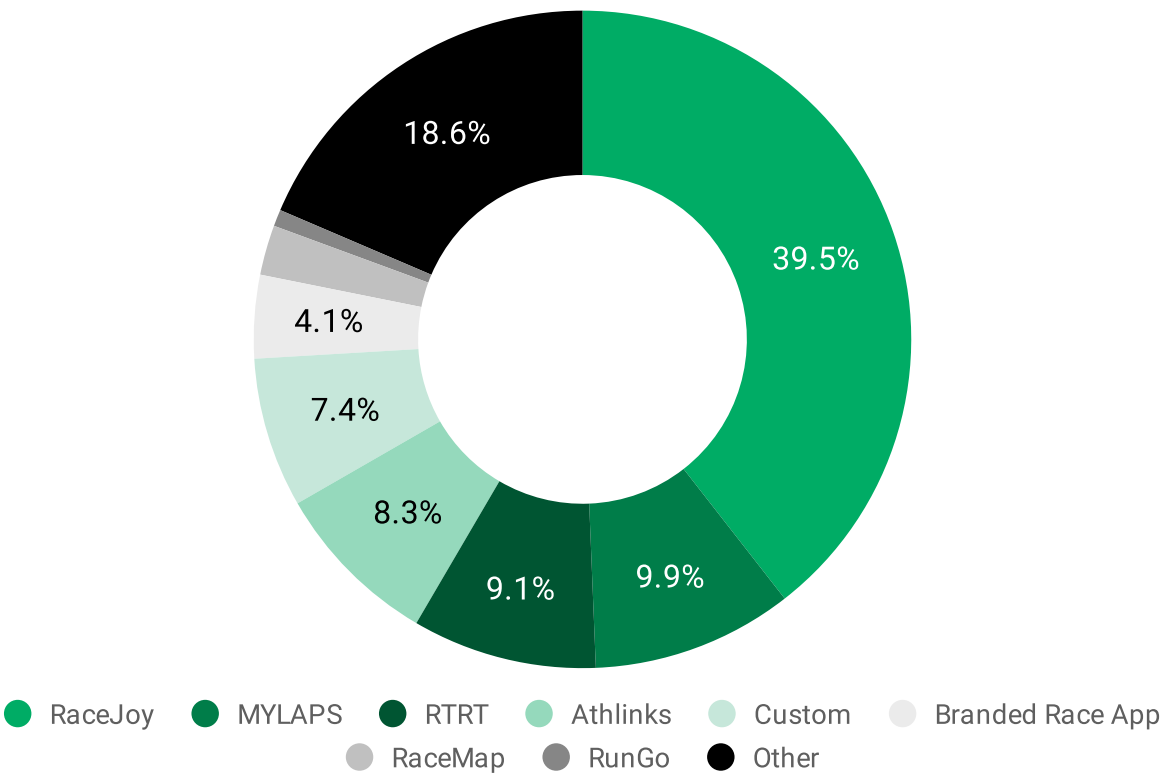
Scoring Software (Survey Respondents)



Participant Tracking

Timing isn't only about hard results, with many timers providing participant tracking options both during and after the event. While RaceJoy was the most frequently used, timers also offered tracking via MYLAPS, RTRT, Athlinks, and more.

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



Takeaways

- After years of iterative improvements, the next generation of timing technology is here and legacy products are being upgraded to meet the fast-paced demands of timing in 2024.
- Don't get complacent with older technology. Set aside time to learn new technologies, prioritizing options with a fast learning curve and robust documentation to get your entire team trained, fast.



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