



# Industry Update

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# Agenda

- Race Participation
- Participant Trends
- Pricing



Photo: Ville to Ville Relay



# Data Parameters



- RunSignup represents an estimated 40-50% of endurance market share.
- Unless otherwise noted, 2023 “Year” is December 1, 2022-November 30, 2023. Mid-year 2024 is December 1, 2023-May 31, 2024.
- Data includes 75,510 race events and 9,374,018 participants from 2023 (including imported registrations). Mid-year 2024 data includes 49,161 race events and 5,089,533 participants.
- Reports that involve participation comparisons look at the cohort of races on the RunSignup platform for *both* years
- Registration data (not finisher).
- Some trends may be impacted by specific features of the RunSignup platform.





# Race Participation



Photo: Ventura Marathon



# Participation Rebounded in 2023

**10%**

Growth  
2022-2023

**1%**

Decline  
2019-2023

## Change in Event Participation 2022-2023

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%

# Per-Race Participation Showed Post-Pandemic Rebound

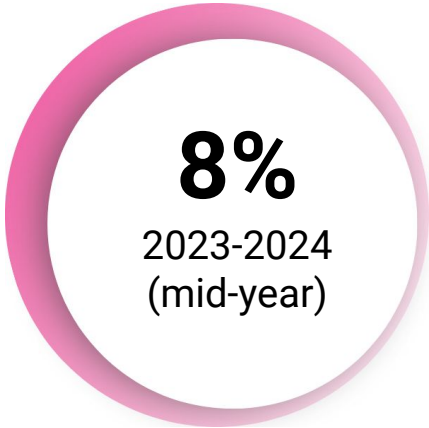


Change in Race Weekend Participation 2019-2023

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%

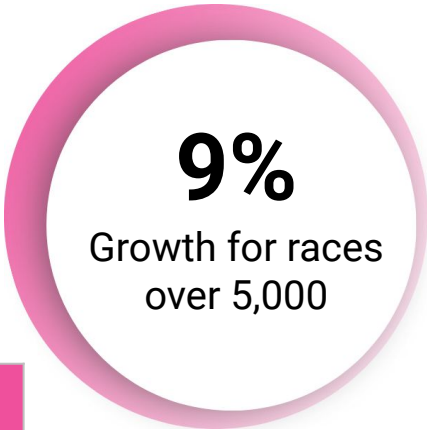
Overall	3,052,772	3,015,463	-1%
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# Participation Continues to Grow



Per-Race Participation 2023 to 2024			
Month	2023 Registrations	2024 Registrations	Percent Change
December ('23)	298,794	335,837	12.4%
January	190,116	205,611	8.2%
February	292,840	313,344	7.0%
March	401,743	443,452	10.4%
April	615,891	661,128	7.3%
May	622,622	653,683	5.0%
Total	2,422,006	2,613,055	7.9%

# Participation Continues to Grow



Per-Race Participation 2023 to 2024		
Race Size (Starting Year)	Change 2019-2023	Change 2023-2024
Under 500	13.6%	8.7%
501-1,000	-5.1%	5.4%
1,001-5,000	-7.1%	8.9%
5,000+	-15.9%	8.7%



# No Race Churn (over 500)

2018 No Race Churn was 6%

2019 No Race Churn was 5.6%

2023 No Race Churn was 5.9%

Churn 2023-2024			
Month	Competitor Churn	No Race Churn	New Race Growth
January	1.5%	5.3%	7.9%
February	0.7%	4.9%	12.4%
March	0.8%	6.2%	16.1%
April	1.8%	6.6%	10.4%
May	1.4%	3.7%	10.6%

Churn 2022-2023			
Month	Competitor Churn	No Race Churn	New Race Growth
January	0.0%	9.9%	0.8%
February	3.2%	7.9%	1.1%
March	3.1%	5.8%	2.0%
April	2.1%	5.3%	12.3%
May	2.7%	6.5%	3.2%
June	2.6%	3.8%	7.0%
July	3.1%	2.7%	5.9%
August	3.7%	3.7%	2.1%
September	2.5%	7.1%	6.2%
October	2.1%	6.5%	-1.2%
November	3.0%	1.3%	10.7%
December	2.4%	5.9%	8.4%



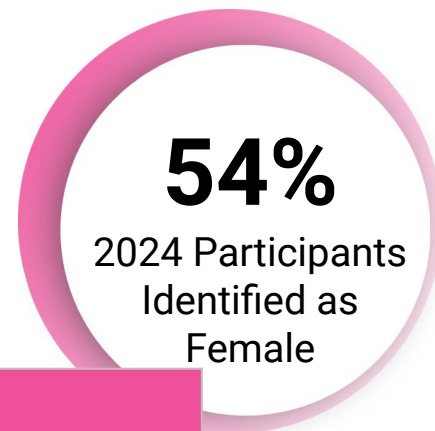
# Participant Trends



Photo: Negative Split



# Participant By Gender



Percent of Participants by Gender						
Gender	2019%	2020%	2021%	2022%	2023%	2024**
Male	42.8%	39.8%	42.2%	43.9%	44.7%	42.8%
Female	55.8%	58.3%	55.4%	54.1%	53.4%	53.5%
Non-Binary	-	-	-	0.2%	0.2%	0.2%
N/A	1.4%	1.9%	2.4%	1.9%	1.7%	3.6%

\*\* - Mid-year numbers

# Participant By Age

**16%**

2024 Participants  
Between 18-29

## Percent of Participants by Gender

Age	2019%	2020%	2021%	2022%	2023%	2024**
Under 18	17.8%	15.3%	18.3%	18.7%	18.8%	15.8%
18-29	16.4%	13.3%	12.8%	13.9%	14.8%	15.7%
30-39	22.4%	22.2%	20.3%	20.5%	19.8%	21.2%
40-49	19.9%	22.0%	20.3%	19.7%	18.9%	19.3%
50-59	13.9%	15.8%	14.8%	14.3%	13.8%	13.7%
60-69	6.2%	7.3%	7.4%	7.4%	7.8%	7.8%
70+	1.7%	2.0%	2.4%	2.3%	2.6%	2.7%
N/A	1.7%	2.1%	3.6%	3.2%	3.5%	3.9%

\*\* - Mid-year numbers





# Pricing Trends



Photo: Swim to the Moon





# Average Prices



Average Price by Distance						
	2019	2020	2021	2022	2023	2024**
1 Mile	\$17.99	\$17.73	\$19.60	\$20.05	\$20.71	<b>\$21.51</b>
5K	\$28.05	\$26.39	\$27.40	\$28.94	\$29.97	<b>\$31.95</b>
10K	\$35.97	\$31.27	\$34.55	\$38.09	\$39.75	<b>\$43.12</b>
Half	\$63.09	\$53.13	\$58.38	\$65.29	\$66.44	<b>\$69.36</b>
Marathon	\$89.53	\$72.25	\$74.47	\$86.62	\$91.62	<b>\$99.53</b>
Ultra	\$110.99	\$72.64	\$70.98	\$95.73	\$97.65	<b>\$116.04</b>
Triathlon	\$90.50	\$88.41	\$97.15	\$99.64	\$103.46	<b>\$108.75</b>

Change '19	Change '23
19.6%	3.9%
13.9%	6.6%
19.9%	8.5%
9.9%	4.4%
11.2%	8.6%
4.6%	18.8%
20.2%	5.1%

# Price Increases

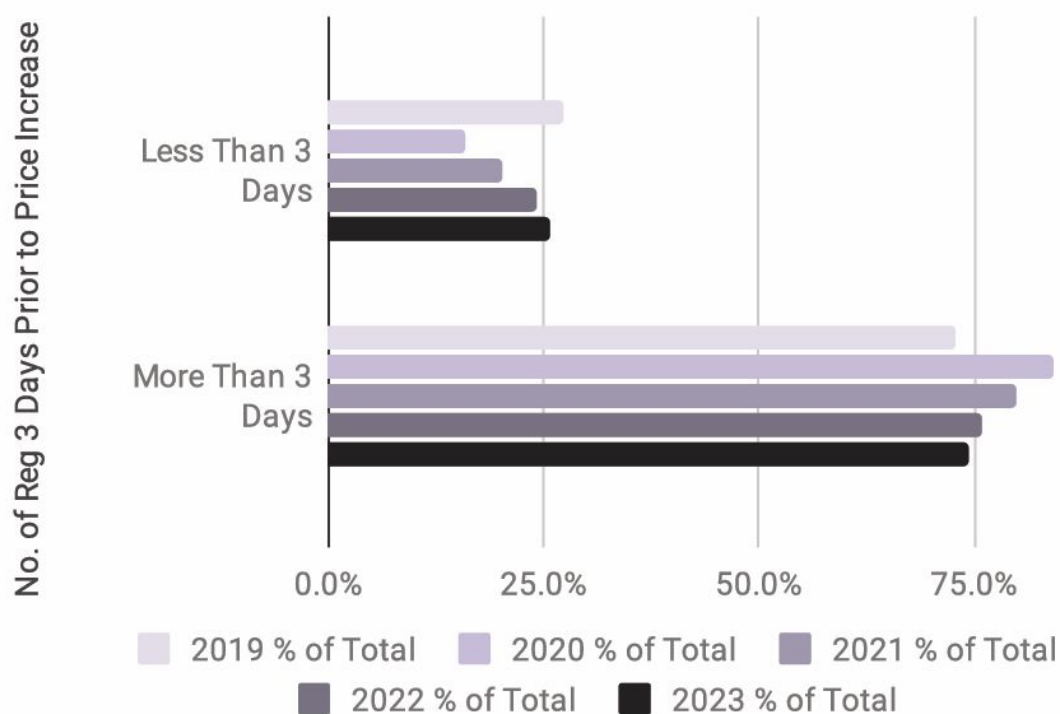
**2.4**

Price Increases for  
a marathon.

## Average Number of Price Increases

	2019	2020	2021	2022	2023	2024**
1 Mile	0.6	0.4	0.5	0.6	0.6	0.8
5K	1.0	0.7	0.7	0.9	0.9	1.2
10K	1.4	0.9	1.0	1.3	1.3	1.6
Half	2.1	1.2	1.4	1.7	1.7	2.0
Marathon	2.2	1.2	1.4	1.7	1.7	2.4
Ultra	1.5	0.7	0.8	1.1	1.3	1.4
Triathlon	2.2	1.5	2.0	2.4	2.5	2.7

# Price Incentives

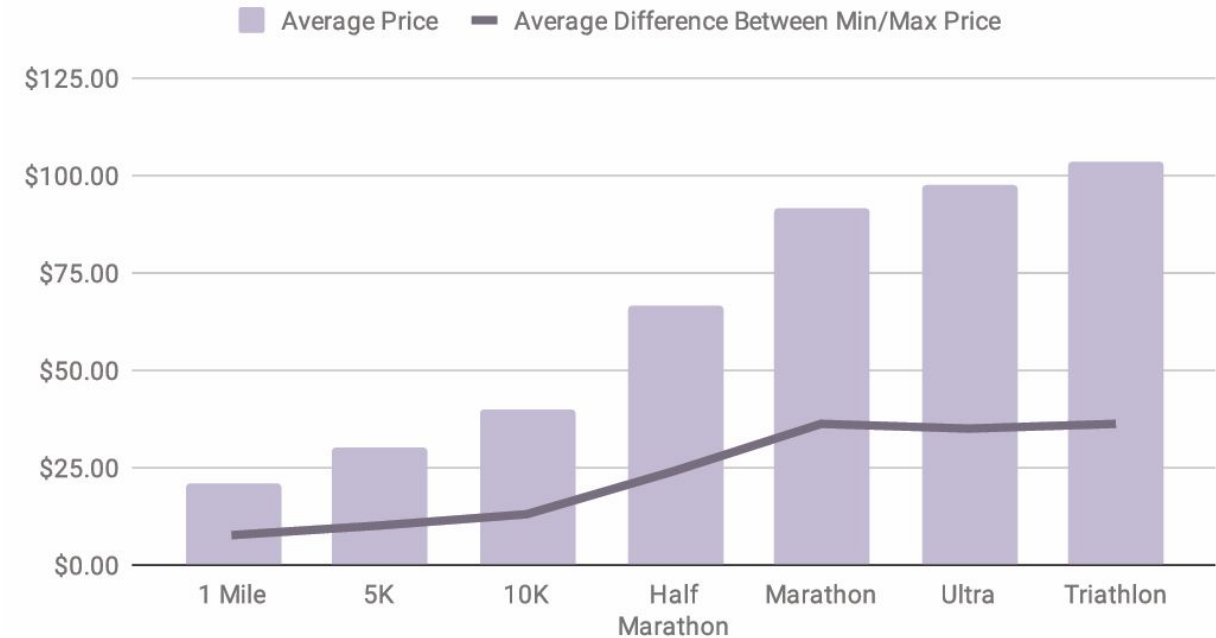


**26%**

Of Registrations Were  
Within 3 Days of a  
Price Increase or  
Reg Close

# Minimum & Maximum Prices

Average 2023 Price Compared to Difference Between Minimum & Maximum



Distance	Min Price	Max Price
1 Mile	\$19.21	\$22.23
5K	\$27.51	\$32.43
10K	\$36.06	\$43.45
Half Marathon	\$59.17	\$73.68
Marathon	\$80.24	\$103.00
Ultra	\$88.85	\$106.18
Triathlon	\$88.78	\$117.68

# Payments

**35%**

May Payments  
were by Saved  
Method

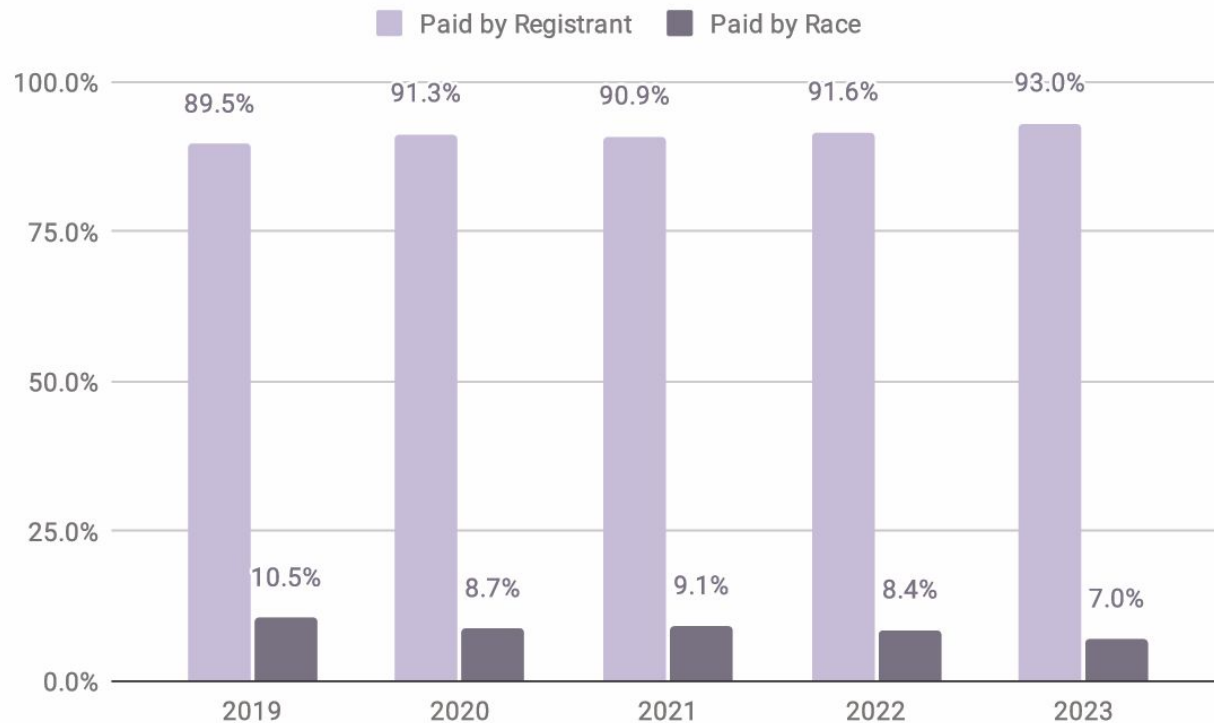
## Saved Payments

Month	Apple Pay Transactions	Saved Credit Card Transactions	% Transactions with Apple Pay or Saved Credit Card
May '23	0.0%	17.5%	17.5%
June '23	0.0%	18.2%	18.2%
July '23	4.6%	17.1%	21.7%
August '23	16.1%	14.2%	30.3%
September '23	17.0%	13.0%	30.0%
October '23	18.0%	13.5%	31.5%
November '23	18.8%	12.8%	31.6%
December '23	18.0%	17.5%	35.5%
January '24	17.8%	16.1%	33.9%
February '24	16.4%	20.7%	37.1%
March '24	19.7%	13.5%	33.3%
April '24	19.8%	13.1%	32.9%
May '24	19.9%	14.6%	34.5%



# Processing Fees

## Processing Fees Paid By Registrants vs The Race



**93%**

Processing Fees  
Are Paid By  
Registrants



# Questions?

