



State of the Industry:

2024

RaceTrends Report





Today's **Agenda**

- Introduction
- The State of the Industry
- Event Trends
- Registration Trends
- Marketing Trends
- GiveTrends
- RaceDay Trends



Data Parameters



- RunSignup is an employee owned event technology company
- Report represents an estimated 45-50% of endurance market share.
- Year is 12/1/2023-11/30/2024 (unless otherwise stated)
- Some trends may be impacted by specific features of the RunSignup platform.
- Survey data is from the 2024 Timer Market Survey.

Data Set

Events on RunSignup

Event Type	2020 # Events	2021 # Events	2022 # Events	2023 # Events	2024 # Events
Overall	46,893	59,885	68,720	75,510	85,284
5K and less	24,407	30,140	35,664	40,105	45,778
10K and less	5,046	6,142	6,777	7,427	7,427
Half Marathon and less	3,572	4,091	4,420	5,024	6,053
Marathon and less	1,640	1,971	2,151	2,279	2,487
Ultra	2,256	2,585	2,572	2,703	2,806
Triathlon	956	1,518	1,823	2,023	2,156
Unknown	9,016	13,438	15,313	15,949	17,500

Events are single event distances.

Registrations on RunSignup

Event Type	2020 # Registrations	2021 # Registrations	2022 # Registrations	2023 # Registrations	2024 # Registrations
Overall	4,713,380	6,385,666	7,717,532	9,374,018	10,808,867
5K and less	2,677,195	3,810,273	5,103,643	5,817,438	7,054,314
10K and less	498,424	691,264	1,003,584	1,089,038	1,225,822
Half Marathon and less	564,017	632,755	848,975	921,360	1,020,249
Marathon and less	151,629	184,004	242,782	258,281	284,930
Ultra	290,792	259,726	227,236	219,557	244,904
Triathlon	36,554	116,272	145,656	160,006	165,945
Unknown	494,769	691,372	145,656	908,338	812,703

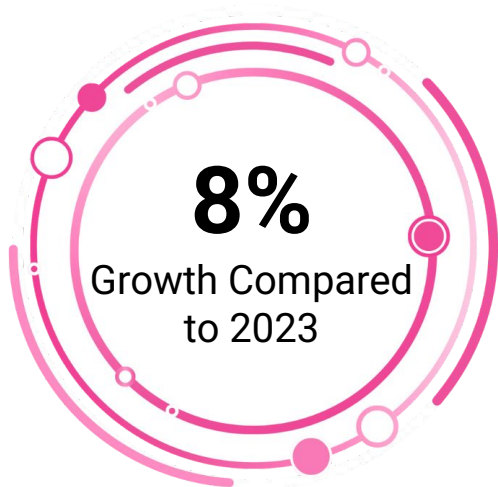
Includes paid, free, and imported registrations.



The State Of the Industry



Participation Up Since 2023



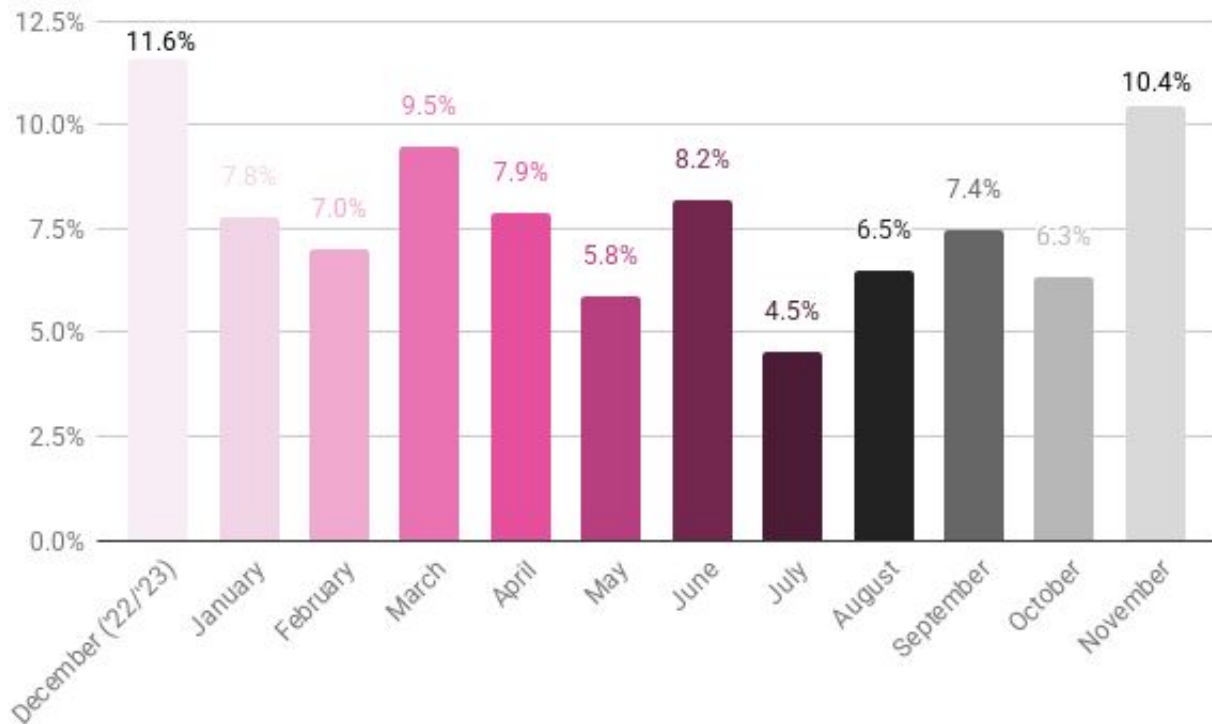
Change in Event Participation 2023-2024

Event Type	# Events 2023	# Events 2024	# Participants 2023	# Participants 2024	Growth
Overall	56,468	58,636	7,764,367	8,403,284	8.2%
5K and less	30,532	31,034	4,931,999	5,397,200	9.4%
10K and less	5,677	5,745	923,713	1,005,491	8.9%
Half Marathon and less	3,944	3,952	813,702	863,193	6.1%
Marathon and less	1,855	1,894	233,053	237,297	1.8%
Ultra	2,021	2,022	164,546	187,907	14.2%
Triathlon	1,700	1,756	141,642	146,832	3.7%
Unknown	10,739	12,233	555,712	565,364	1.7%

Participation

Month-to-Month

Monthly Changes to Per-Race Participation Compared to 2023



Large Races Improvement



Participation by 2023 Event Size

Size	2023 Participants	2024 Participants	Percent Change
Less than 500	2,620,632	2,882,647	10.0%
501-1,000	1,351,852	1,443,498	6.8%
1,001-5,000	2,339,916	2,519,134	7.7%
5,000+	876,828	921,599	5.1%

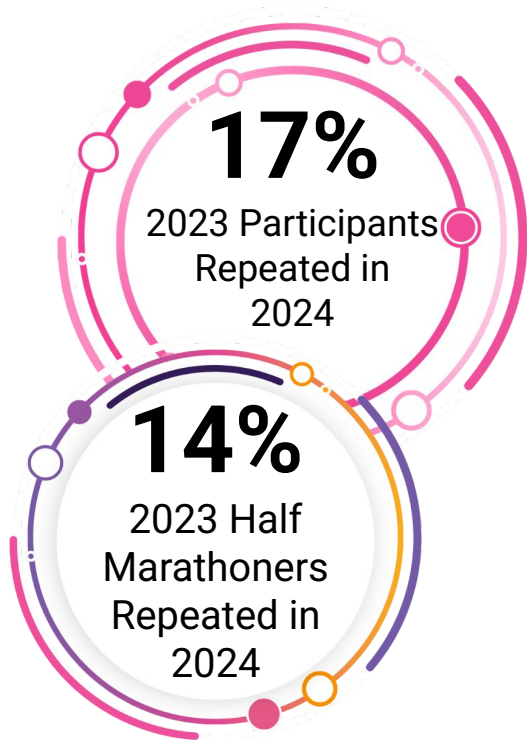
Top 100 Largest Races

- On average, races grew 11.1% compared to last year; just 16 races had fewer participants.
- On average, races were 1.3% smaller than 2019; 36 races grew compared to 2019.
- 32 races exceeded 20,000 participants
- There were 13 races new to the list in 2024. 2 races were brand new.

2024 Top 100 List

2024 Rank	2024 Finishers	2023 Finishers	2019 Finishers	Change '23-'24	Change '19-'24	Name	Location	Registration Provider 2024
1	65,520	61,480	53,519	6.6%	22.4%	TCS New York City Marathon + Abbott Dash to the Finish Line 5k	New York, NY	In-House
2	61,341	57,640	45,852	6.4%	33.8%	Bank of America Chicago Marathon + Abbott Chicago 5k	Chicago, IL	Haku
3	43,338	37,557	60,636	15.4%	-28.5%	AJC Peachtree Road Race	Atlanta, GA	Let's Do This
4	41,388	34,974	41,197	18.3%	0.5%	BOLDERBoulder	Boulder, CO	Configio
5	40,321	39,906	42,342	1.0%	-4.8%	Walt Disney World Marathon Weekend	Lake Buena Vista, FL	Haku
6	34,697	35,445	35,127	-2.1%	-1.2%	Boston Marathon + BAA 5k	Boston, MA	In-House
7	31,455	28,025	34,565	12.2%	-9.0%	Independence Blue Cross Broad Street Run	Philadelphia, PA	RunSignup
8	30,253	26,113	32,285	15.9%	-6.3%	Hot Chocolate 15K/5K - Chicago	Chicago, IL	Enmotive
9	28,456	25,416	26,818	12.0%	6.1%	RBC Brooklyn Half	Brooklyn, NY	In-House
10	27,897	25,773	34,832	8.2%	-19.9%	Lilac Bloomsday Run	Spokane, WA	ClickM
11	27,843	24,769	24,659	12.4%	12.9%	United Airlines NYC Half	New York, NY	In-House
12	27,525	28,394	25,729	-3.1%	7.0%	Philadelphia Marathon Weekend - AACR Marathon, Dietz & Watson Philadelphia Half Marathon, and Rothman Orthopaedics 8K	Philadelphia, PA	Race Roster
13	27,305	26,287	32,362	3.9%	-15.6%	Disney Princess Half Marathon Weekend Presented by Corkcicle	Orlando, FL	Haku
14	26,827	22,107	26,967	21.4%	-0.5%	Honolulu Marathon	Honolulu, HI	Real Buzz
15	26,765	22,365	29,287	19.7%	-8.6%	Cooper River Bridge Run	Charleston, SC	Race Roster

Repeat Participation

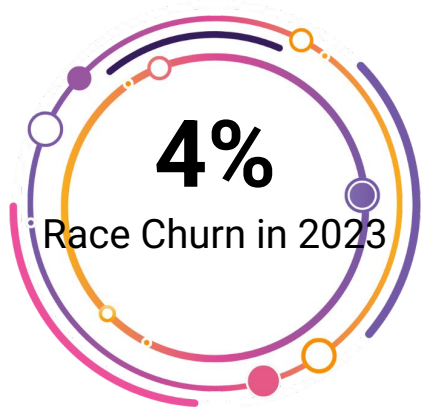


Percent of Participants Who Repeat the Following Year

Event Type	Repeat % 2020	Repeat % 2021	Repeat % 2022	Repeat % 2023	Repeat % 2024
Overall	10.1%	12.0%	14.1%	16.1%	17.4%
5K and less	9.9%	12.7%	15.7%	17.3%	18.5%
10K and less	11.9%	13.1%	15.2%	18.2%	19.7%
Half Marathon and less	11.5%	11.0%	10.0%	12.6%	13.7%
Marathon and less	7.2%	9.5%	10.2%	11.3%	12.0%
Ultra	8.1%	6.6%	9.5%	10.1%	11.5%
Triathlon	4.4%	7.9%	6.3%	8.5%	7.9%
Unknown	7.8%	11.5%	12.2%	13.7%	14.9%

Tracks returners to the same distance.

No Race Churn



Lowest Churn Rate since we started tracking churn.

Churn 2023-2024

Month	Competitor Churn	No Race Churn
January	1.7%	5.8%
February	0.7%	4.9%
March	0.8%	6.2%
April	1.8%	6.6%
May	1.4%	3.7%
June	2.8%	3.2%
July	1.5%	1.9%
August	0.5%	5.2%
September	1.8%	4.7%
October	1.2%	5.2%
November	0.5%	1.6%
December	0.9%	2.3%
Total	1.2%	3.9%

Distribution of Races

Percent of Races Compared to Participation



Events vs Participation

Races by Month

Month	2020 % of Total	2021 % of Total	2022 % of Total	2023 % of Total	2024 % of Total
January	3.8%	3.6%	3.5%	3.5%	3.5%
February	5.3%	3.8%	4.3%	4.0%	3.9%
March	6.9%	5.5%	6.1%	5.8%	6.3%
April	8.3%	8.4%	10.1%	10.4%	10.3%
May	8.4%	10.2%	10.2%	9.9%	9.8%
June	7.9%	8.7%	9.6%	9.6%	10.0%
July	7.7%	7.9%	7.9%	8.2%	7.6%
August	9.0%	8.8%	7.7%	7.8%	8.3%
September	13.8%	14.3%	13.1%	13.9%	13.8%
October	15.0%	15.3%	14.8%	13.7%	13.0%
November	9.6%	9.7%	9.0%	9.3%	9.4%
December	4.2%	3.7%	3.8%	3.9%	4.2%

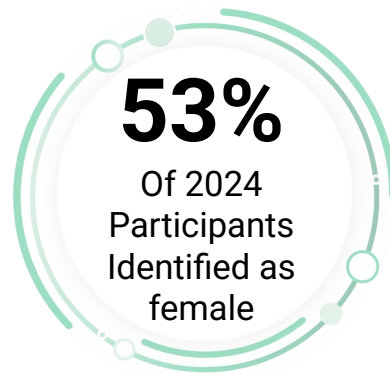
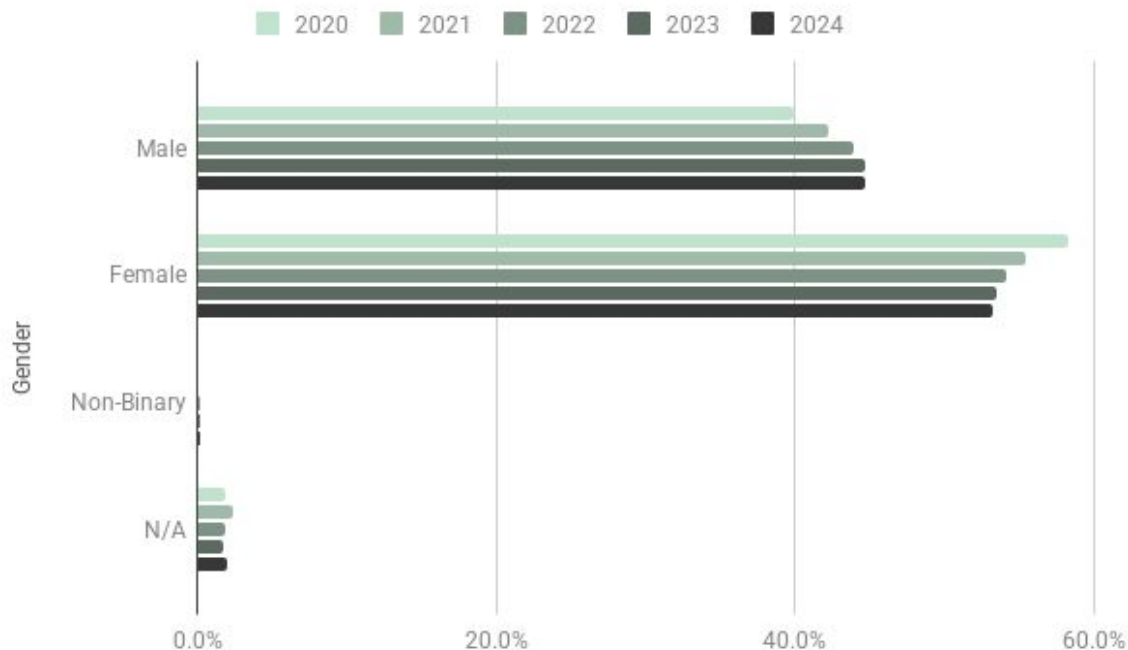


Event Trends



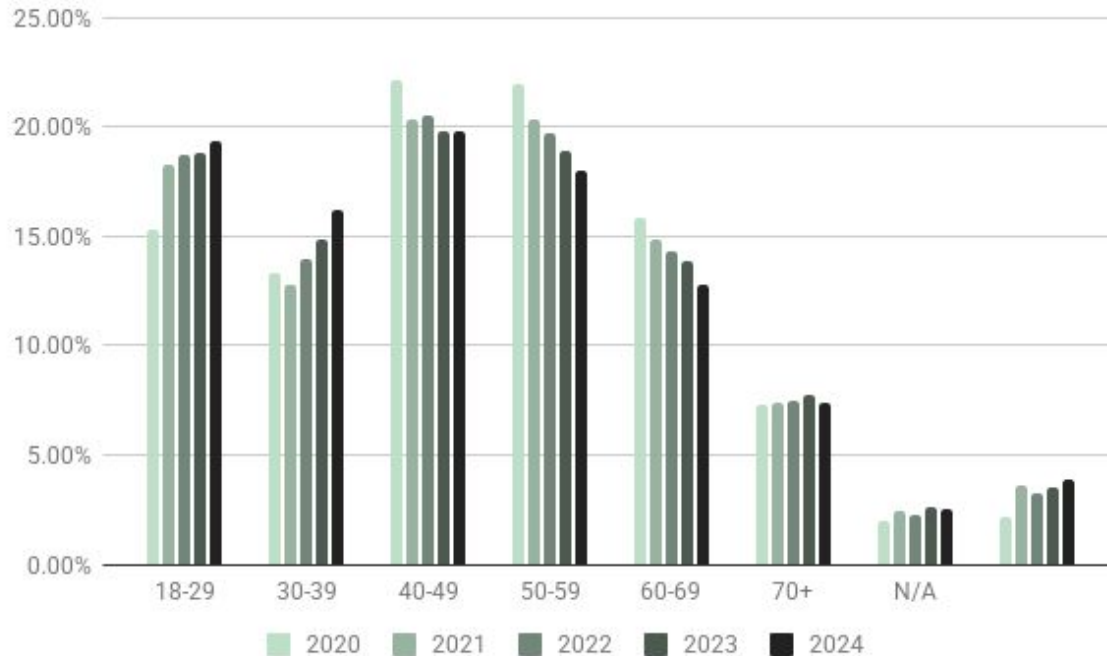
Participation By Gender

Percent of Participants by Gender



Participation By Age

Percent of Participants by Age



16%

Of 2024 Participants
Were 18-29

19%

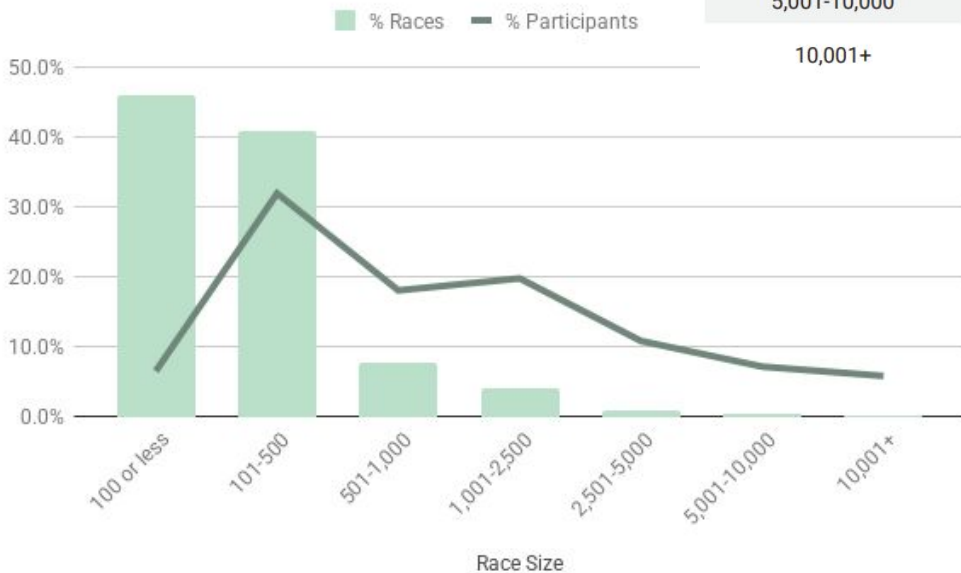
Of 2024
Participants
Were Under 18

38%

Of 2024
Participants
Were 30-49

Race Sizes

Race Size Compared to % Registrations



Race Size

	2022	2023	2024
100 or less	48.0%	48.4%	46.0%
101-500	40.2%	39.5%	40.9%
501-1,000	7.1%	7.2%	7.8%
1,001-2,500	3.5%	3.6%	3.9%
2,501-5,000	0.8%	0.9%	0.9%
5,001-10,000	0.3%	0.3%	0.3%
10,001+	0.1%	0.1%	0.1%

0.4%

Races Had More
Than 5,000
Participants

13%

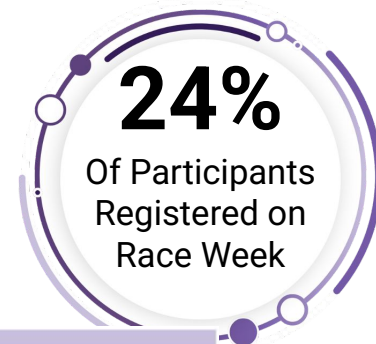
Of Participants
Joined a Race
Over 5,000



Registration Trends



When Runners Register

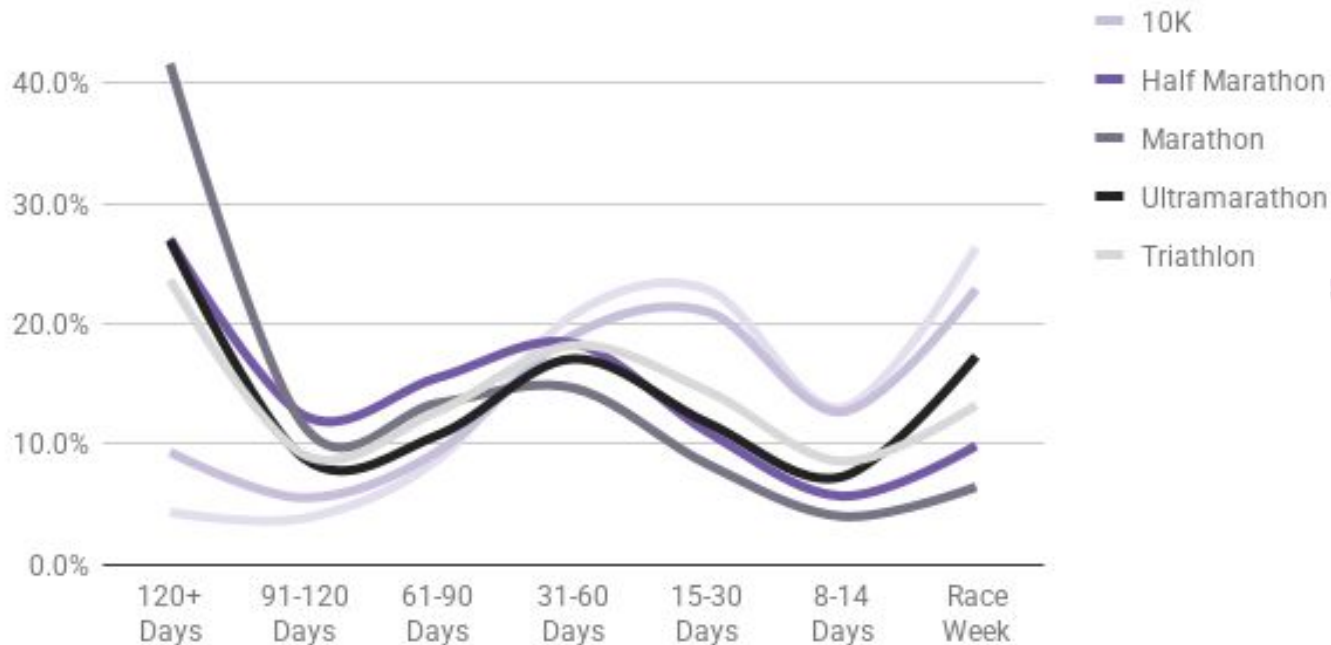


When Runners Register

When Runners Register	2020	2021	2022	2023	2024	Change 2023-2024
Event Week	26.1%	25.2%	25.1%	24.8%	23.9%	-3.8%
8-14 Days	12.9%	13.3%	12.1%	12.1%	11.7%	-3.5%
15-30 Days	20.0%	22.0%	20.6%	20.3%	20.7%	1.9%
31-60 Days	17.0%	19.3%	19.5%	19.8%	20.0%	1.3%
61-90 Days	7.7%	8.2%	9.2%	9.7%	9.7%	0.1%
91-120 Days	3.9%	4.2%	4.8%	5.1%	5.3%	3.1%
120+ Days	12.4%	7.7%	8.8%	8.8%	8.8%	6.8%

When Runners Register By Distance

2024 When Runners Register by Distance



62%

Of 5K Runners
Registered in the
Last Month

53%

Of Marathon
Runners Registered
3+ Months Before
Race Day

Average Prices



Average Event Price by Distance

Race Distance	2020 Average Price	2021 Average Price	2022 Average Price	2023 Average Price	2024 Average Price	Change 2022-2023	Change 2023-2024
1 mile	\$17.73	\$19.60	\$20.05	\$20.71	\$21.41	3.3%	3.4%
5K	\$26.39	\$27.40	\$28.94	\$29.97	\$30.48	3.6%	1.7%
10K	\$31.27	\$34.55	\$38.09	\$39.75	\$41.85	4.4%	5.3%
Half Marathon	\$53.13	\$58.38	\$65.29	\$66.44	\$66.56	1.8%	0.2%
Marathon	\$72.25	\$74.47	\$86.62	\$91.62	\$92.66	5.8%	1.1%
Ultra	\$72.64	\$70.98	\$95.73	\$97.65	\$101.79	2.0%	4.2%
Triathlon	\$88.41	\$97.15	\$99.64	\$103.46	\$104.23	3.8%	0.7%

Price Increases

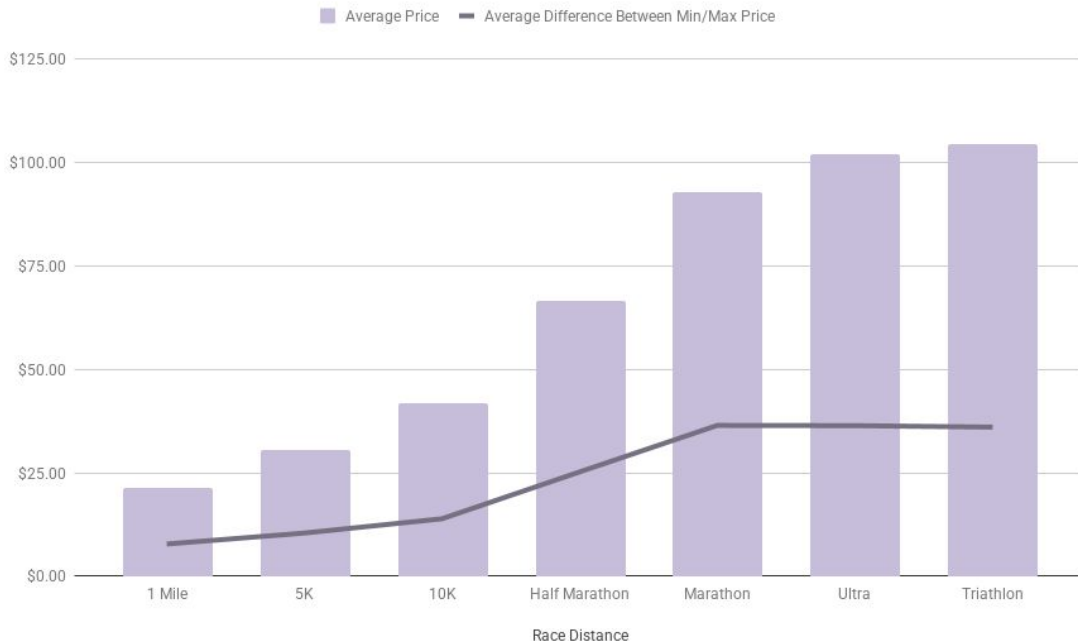


Average Number of Price Increases by Distance

Race Distance	2020 # of Price Increases	2021 # of Price Increases	2022 # of Price Increases	2023 # of Price Increases	2024 # of Price Increases	Change 2023-2024
1 mile	0.4	0.5	0.6	0.6	0.7	16.7%
5K	0.7	0.7	0.9	0.9	1.0	11.1%
10K	0.9	1.0	1.3	1.3	1.3	0.0%
Half Marathon	1.2	1.4	1.7	1.7	1.7	0.0%
Marathon	1.2	1.3	1.8	2	2.1	5.0%
Ultra	0.7	0.8	1.1	1.3	1.3	0.0%
Triathlon	1.5	2.0	2.4	2.5	2.5	0.0%

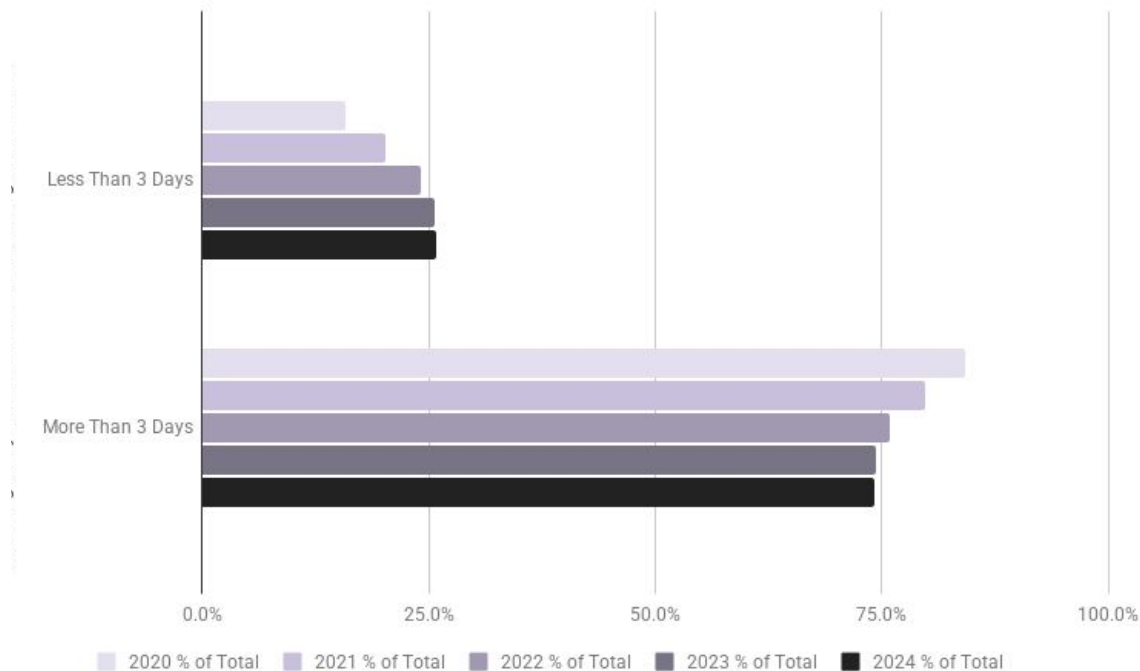
Minimum & Maximum Prices

Average 2024 Price Compared to Difference Between Minimum & Maximum



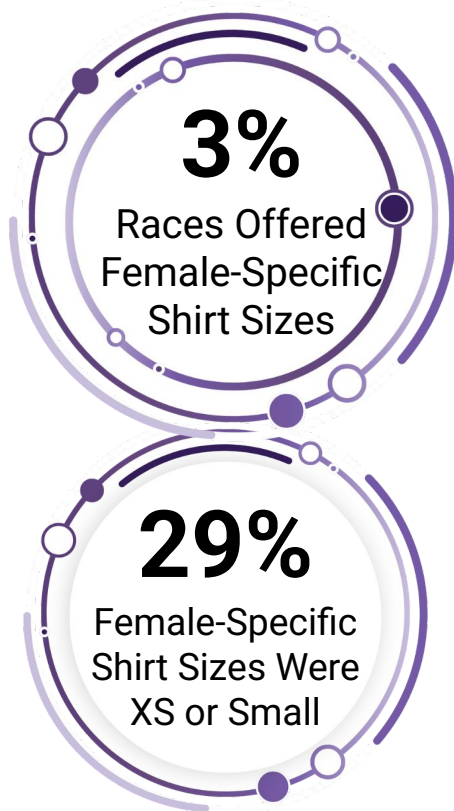
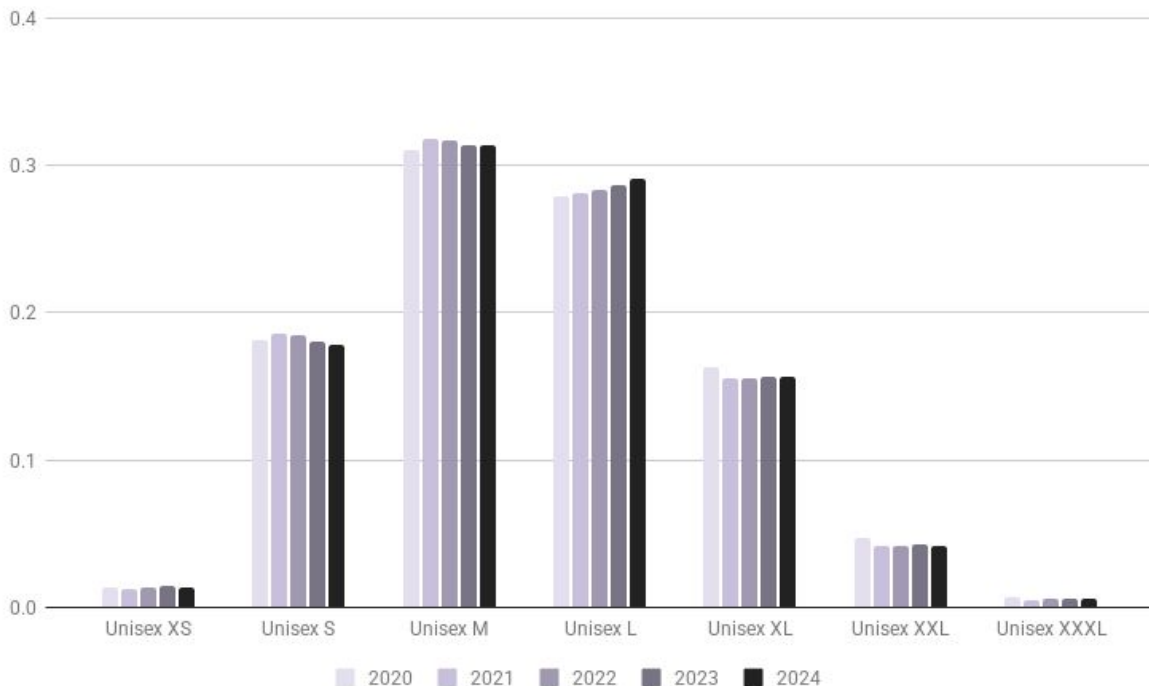
Distance	Min Price	Max Price
1 Mile	\$19.86	\$22.99
5K	\$27.86	\$33.1
10K	\$38.09	\$45.66
Half Marathon	\$59.86	\$73.30
Marathon	\$80.57	\$104.65
Ultra	\$92.31	\$111.68
Triathlon	\$90.25	\$118.28

Pricing Incentives



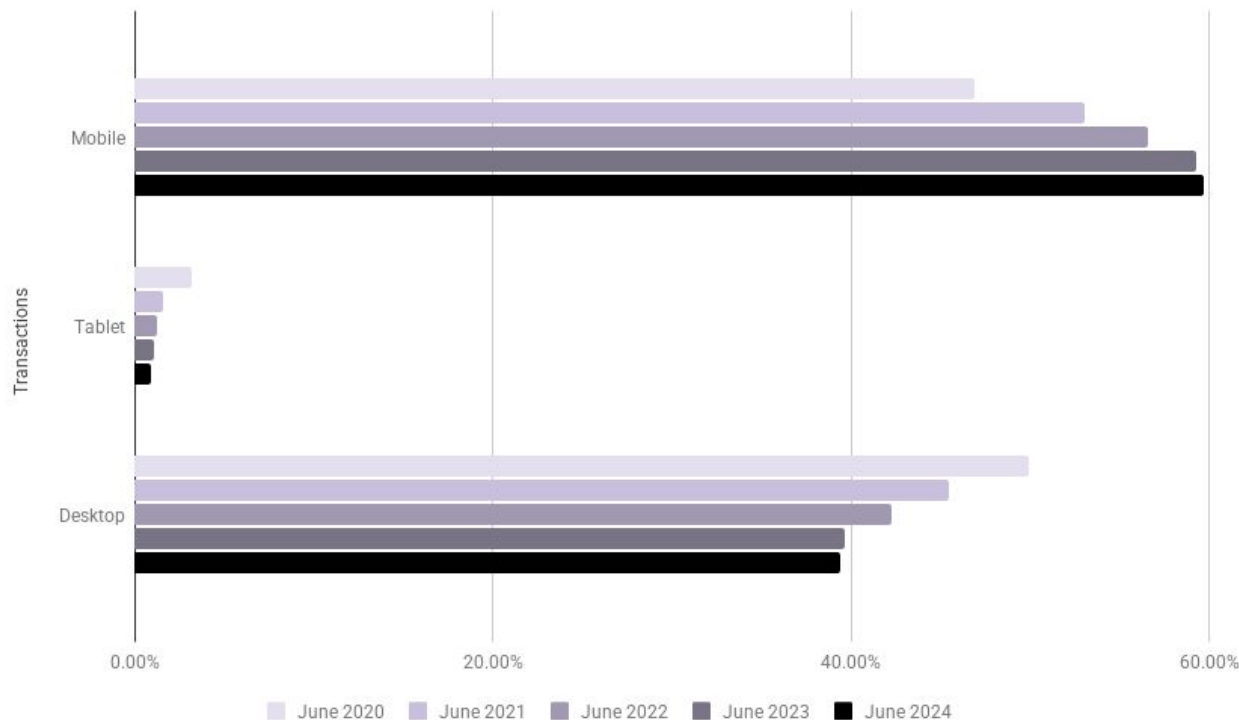
Giveaway Sizing

Unisex Shirt Sizing



Mobile Adoption

Race Website Views by Device Type



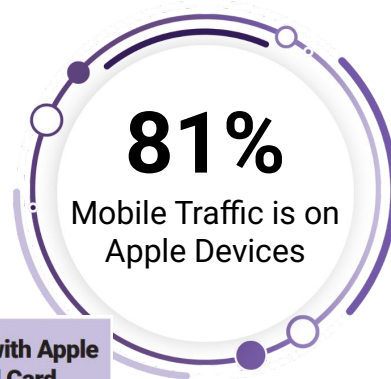
74%

Website Views
Are on Mobile or
Tablet

61%

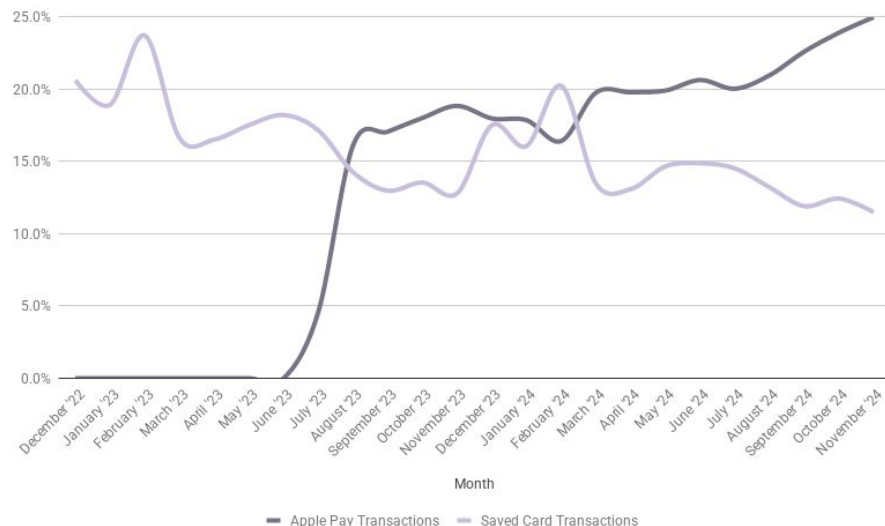
Transactions
Are on Mobile
or Tablet

Payments



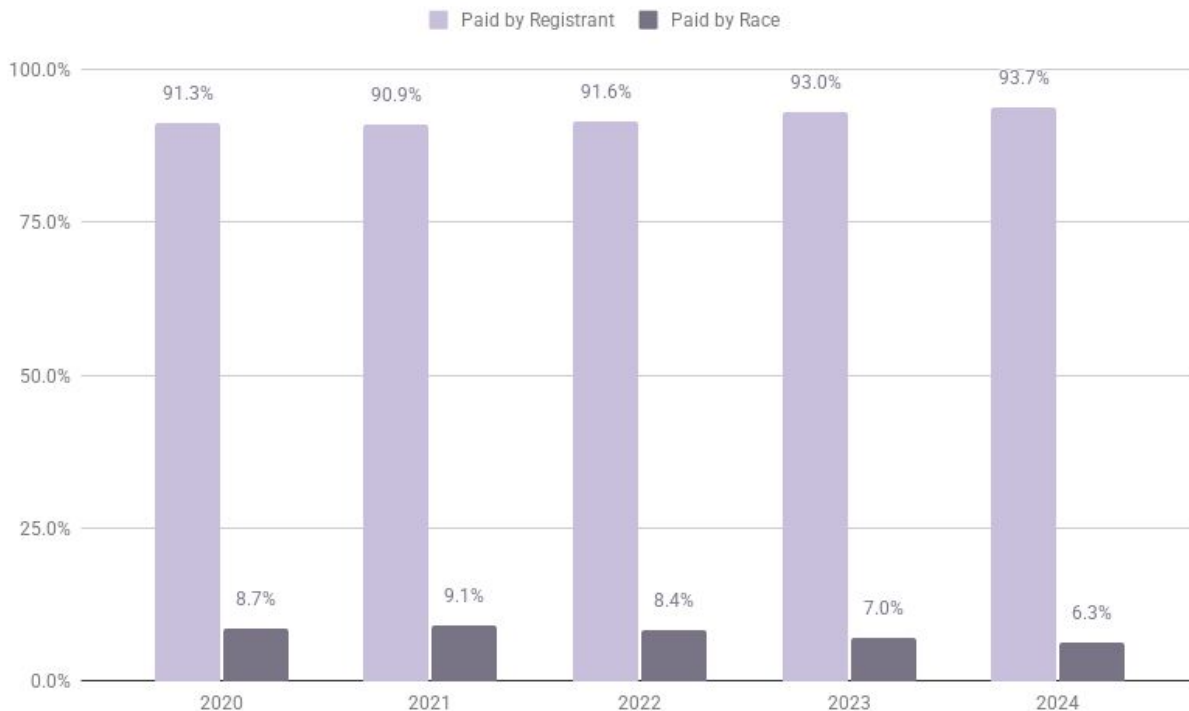
Payments With Apple Pay & Saved Credit Cards

Device Type	Apple Pay Transactions	Saved Card Transactions	% Transactions with Apple Pay or Saved Card
December '23	18.0%	17.5%	35.5%
January '24	17.8%	16.1%	33.9%
February '24	16.4%	20.2%	36.6%
March '24	19.7%	13.5%	33.2%
April '24	19.8%	13.1%	32.8%
May '24	19.9%	14.6%	34.5%
June '24	20.6%	14.9%	35.5%
July '24	20.0%	14.5%	34.5%
August '24	20.9%	13.2%	34.1%
September '24	22.6%	11.9%	34.5%
October '24	23.9%	12.4%	36.3%
November '24	25.0%	11.5%	36.4%



Processing Fees

Processing Fees Paid By Registrants vs The Race

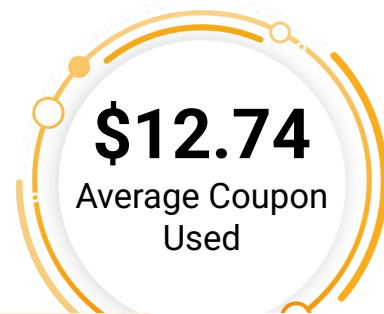




Marketing Trends



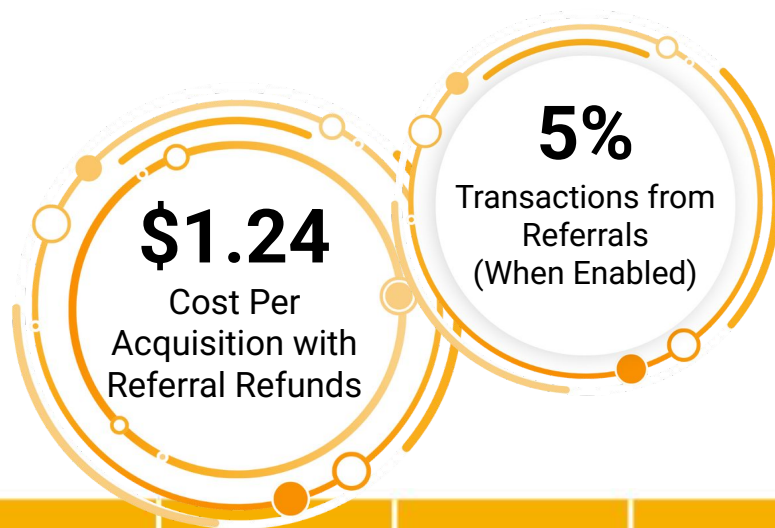
Coupons



Coupon Usage

Coupons	% of Registrations Using Coupons	ROI	Average Discount	Total Discounts	Net Revenue From Coupons
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
2024	6.3%	383.3%	\$12.74	\$5,454,683.20	\$20,910,165.78

Referral Rewards



Referral Rewards Results

	2020	2021	2022	2023	2024
# Total Registrations	13%	7%	5%	5%	6%
# Total Transactions	17%	8%	6%	5%	7%

Groups and Teams

Percent of Participants Who Join Teams

Year	% Participants in Groups	Average Group Size
2020	31.4%	6.6
2021	29.8%	6.8
2022	30.4%	6.8
2023	30.5%	6.9
2024	31%	7.1



Website Traffic Sources

Website Traffic Sources via Google Analytics

Source	June 2020	June 2021	June 2022	June 2023	June 2024
Referral	18.5%	22.0%	24.8%	24.3%	24.1%
Organic Search	17.2%	24.1%	26.5%	26.6%	21.5%
Direct	33.7%	35.1%	31.5%	32.6%	39.4%
Social	27.9%	17.1%	15.3%	14.7%	9.6%
Email	1.5%	0.5%	0.7%	0.6%	0.5%
Paid Search	0.5%	0.6%	0.5%	0.3%	0.3%

24%

Website Traffic
from Referral
Sources

22%

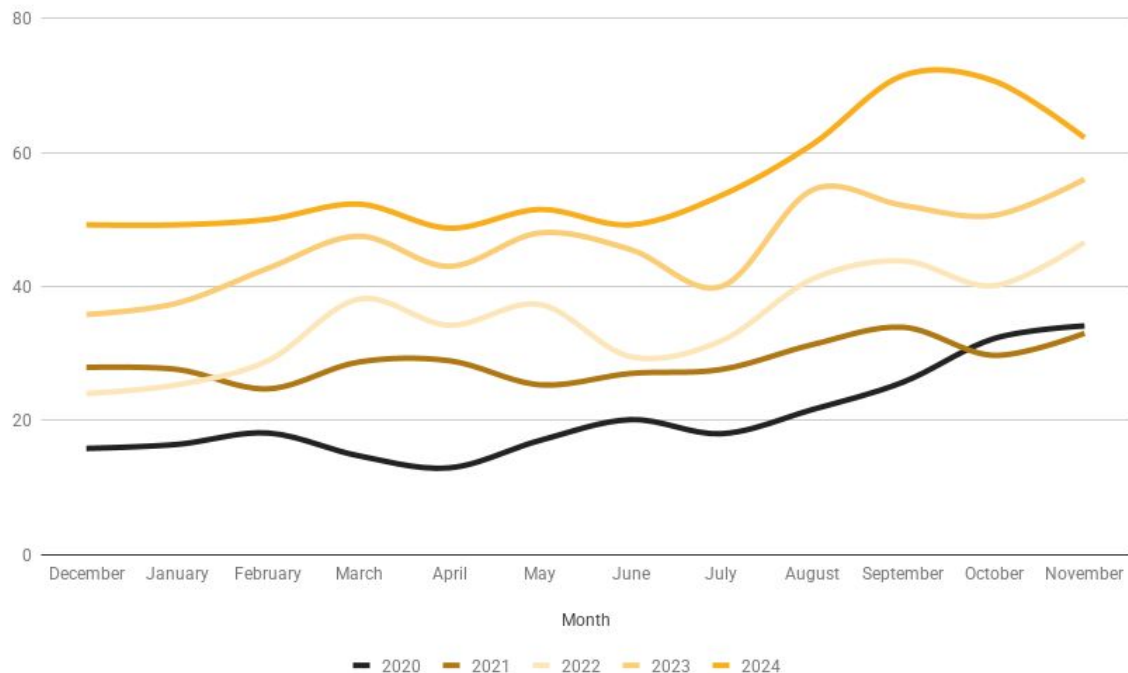
Website Traffic
from Organic
Search

39%

Website Traffic
from Direct
Traffic

Email Marketing

Free Emails Sent



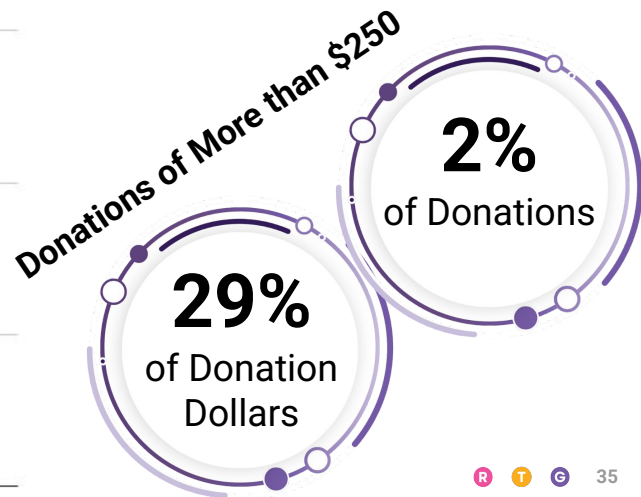
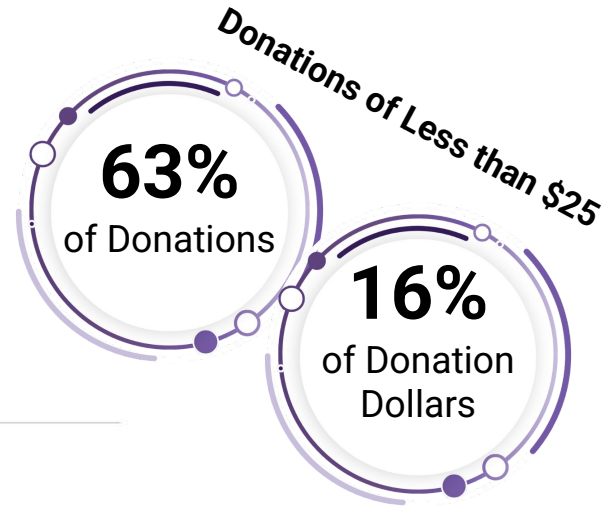
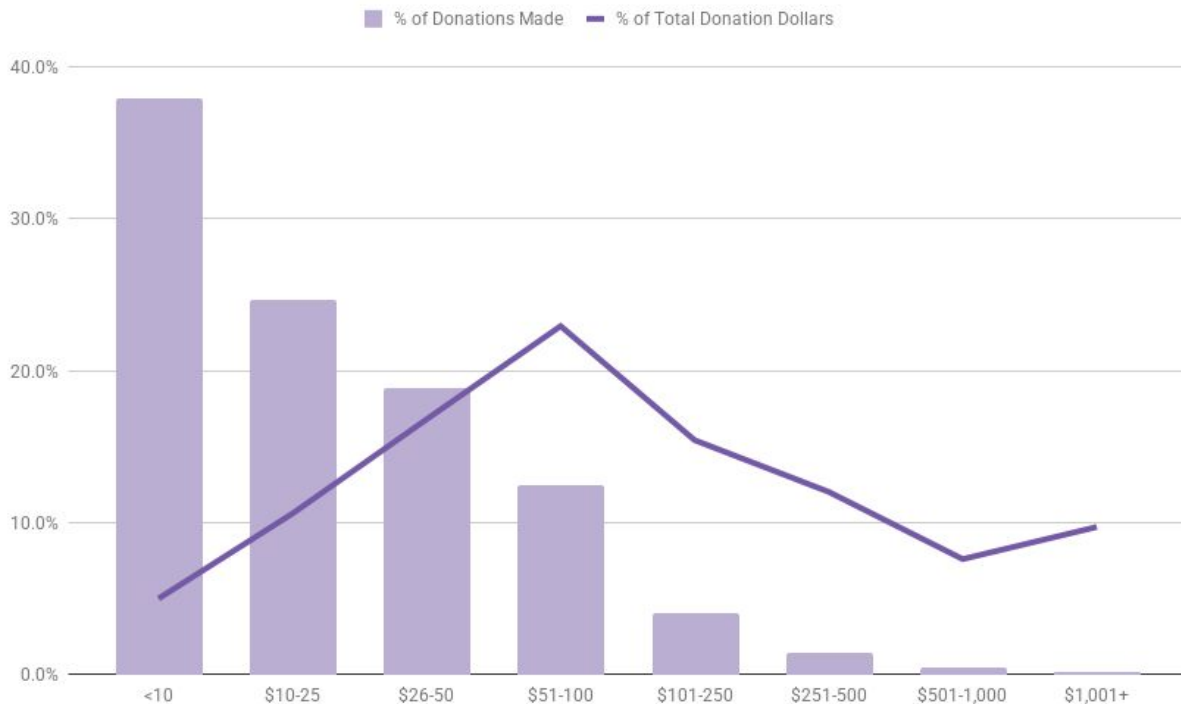


GiveTrends



Donation Amounts

% of Donations Made vs % of Total Donation Dollars

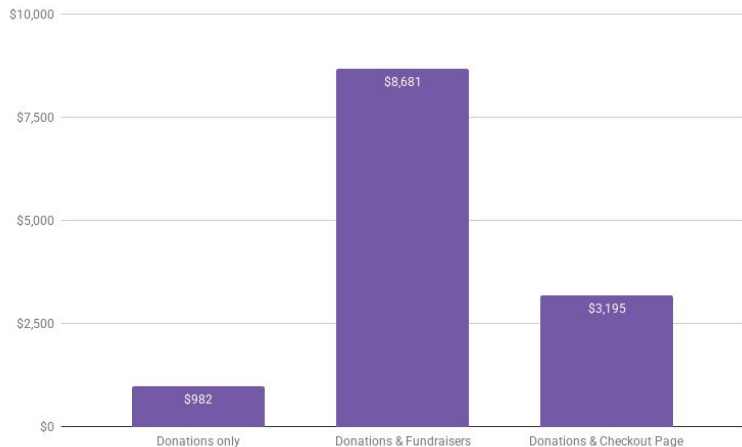


Donation & Fundraising Options

of Events and Donations by Donation Type

Type of Donations	Number of Events					Number of Donations per Event				
	2020	2021	2022	2023	2024	2020	2021	2022	2023	2024
Donations only	10,404	11,849	13,459	15,072	16,510	43	41	37	33	32
Donations & Fundraisers	3,116	3,460	3,893	4,191	4,955	107	121	126	125	122
Donations & Checkout Page	1,260	1,291	1,423	1,761	2,120	172	190	152	108	86

Per-Race Donation Totals by Type





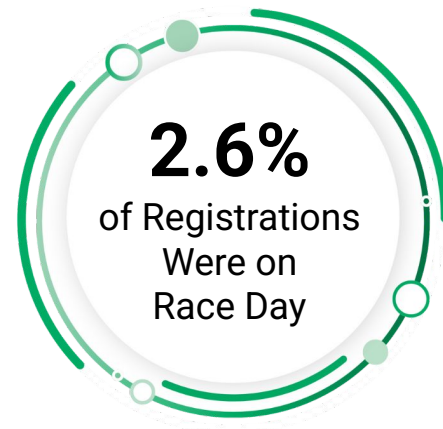
RaceDay Trends



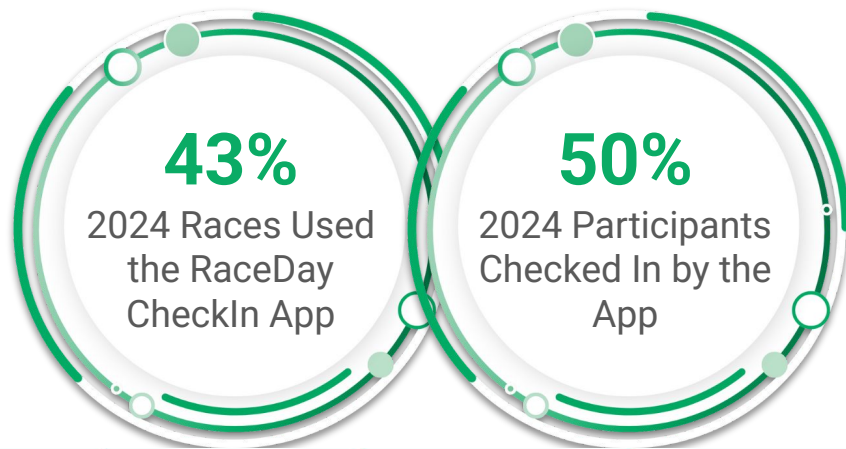
RaceDay Registration

% of Registrations on Race Week

Year	% of Race Week Registrations on RaceDay	% Total Registrations on RaceDay
2020	11.8%	3.1%
2021	8.9%	2.2%
2022	9.5%	2.4%
2023	9.8%	2.4%
2024	10.7%	2.6%

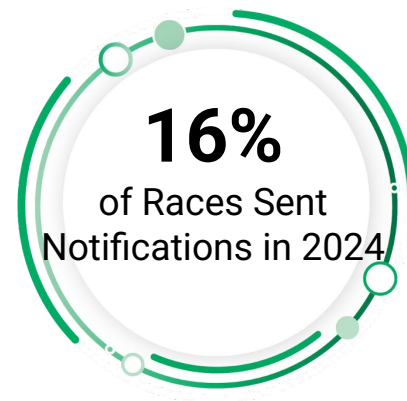
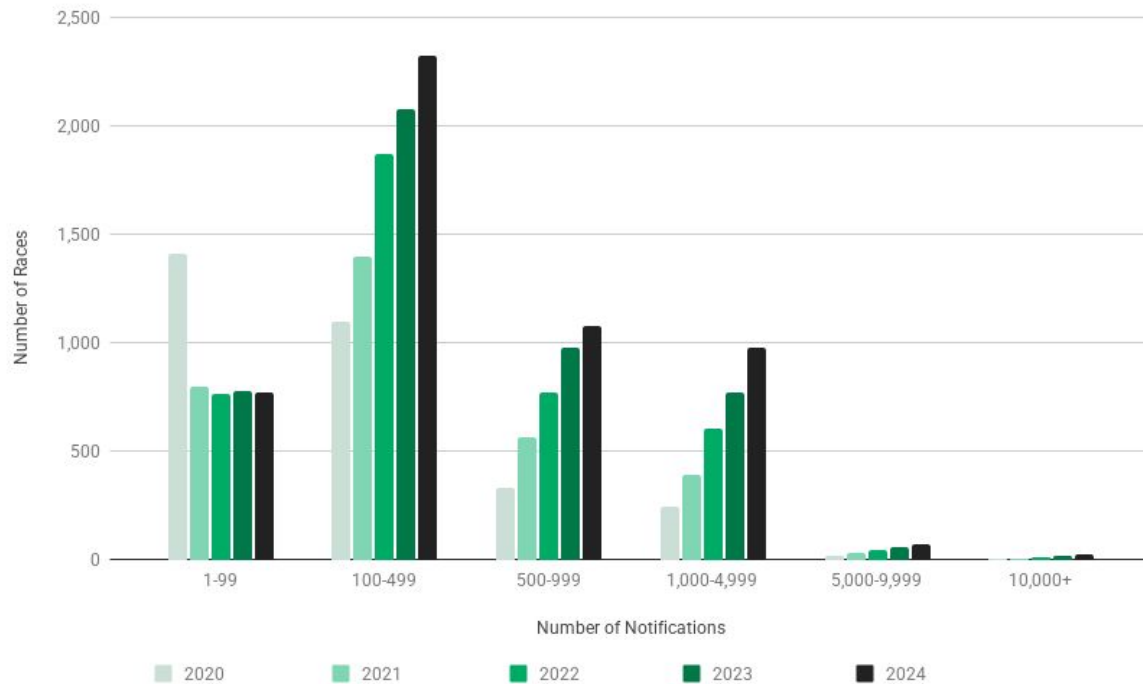


CheckIn App Usage

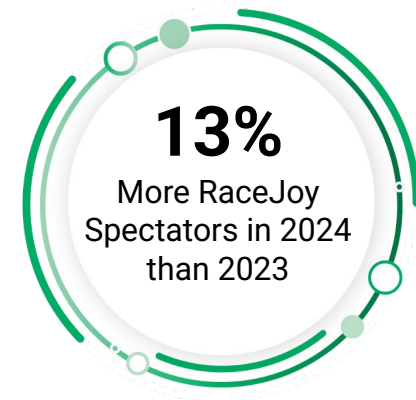


Year	Participants Checked in by App	Participants Not Checked In by App	Races Using CheckIn App	Races Not Using the CheckIn App	% Runners Checked In with App	% Races Using the CheckIn App
2020	403,174	4,310,206	1,513	20,089	8.6%	7.0%
2021	1,405,871	4,979,795	3,922	19,508	22.0%	16.7%
2022	2,662,177	5,626,935	6,918	19,419	32.1%	26.3%
2023	3,687,449	5,686,569	9,486	19,241	39.3%	33.0%
2024	5,429,969	5,378,898	14,122	19,135	50.2%	42.5%

Scored Results Notifications



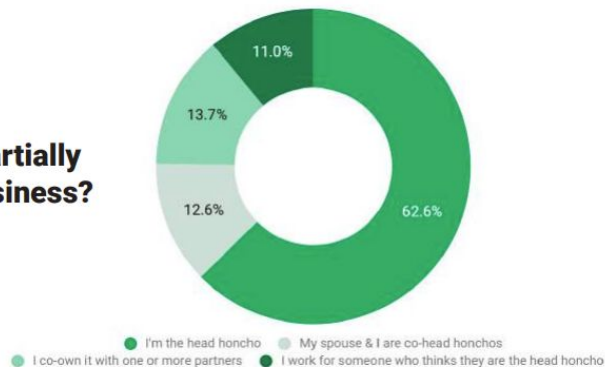
RaceJoy



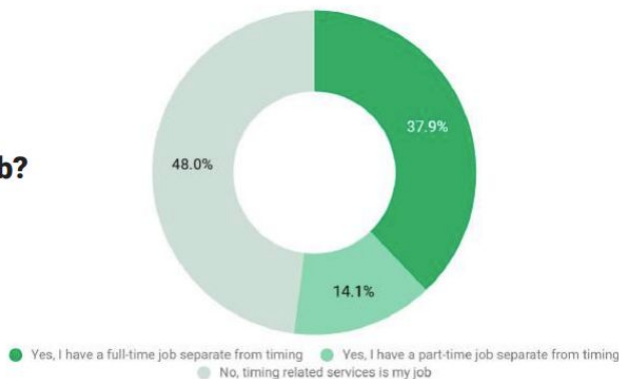
RaceJoy Usage	2020	2021	2022	2023	2024	Change 2023-2024
Races	1,097	1,215	829	781	875	12.0%
Tracked Participants	165,373	142,650	128,194	119,823	121,240	1.2%
Spectators	87,038	162,735	196,150	182,943	206,455	12.9%
Progress Alerts	1,303,158	3,168,372	4,052,806	3,675,122	3,759,351	2.3%
Cheers Sent	198,375	479,363	755,052	703,749	722,173	2.6%

Timing Business

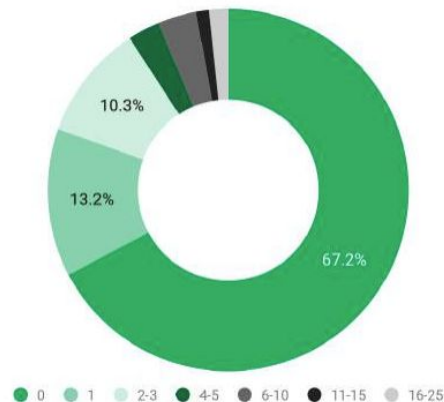
Do You Own or Partially Own a Timing Business?



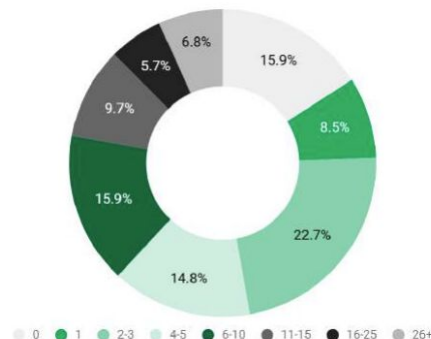
Do You Have Another "Real" Job?



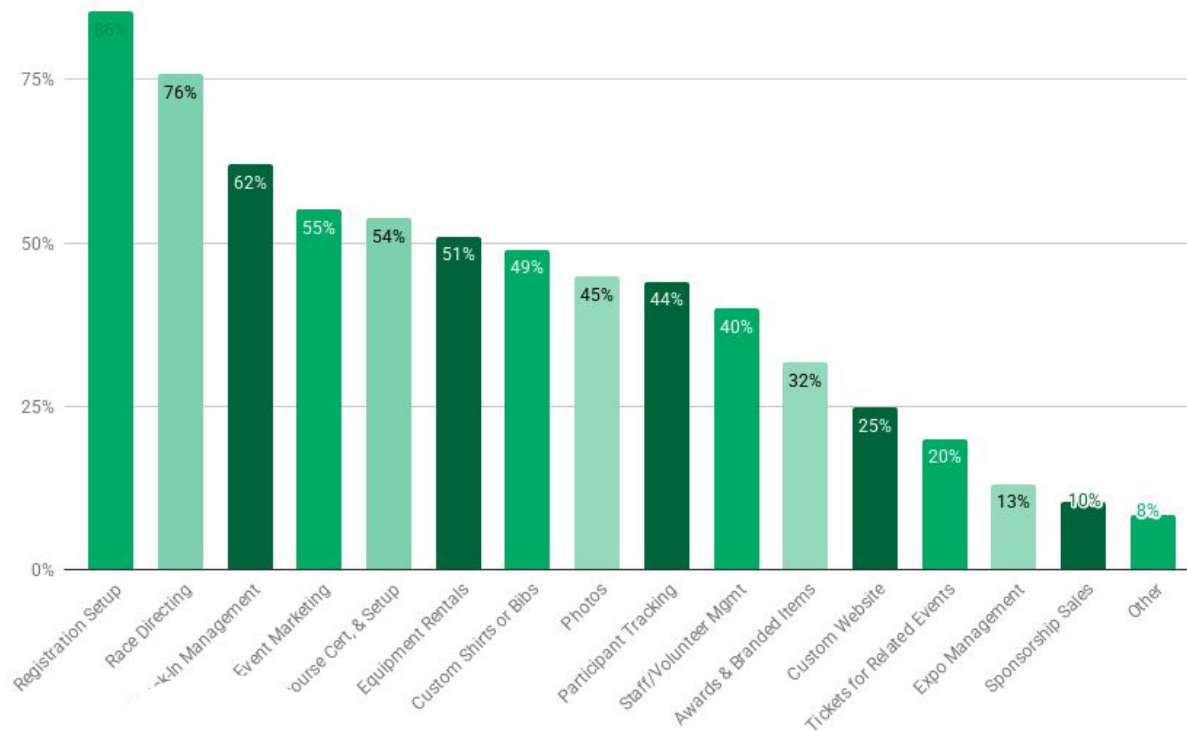
How Many Full-Time Employees Work at Your Timing Business



How Many Part-Time Employees Work at Your Timing Business



Timing Services



What Services Do You Offer (Beyond Timing)



A person is running on a rocky trail with a waterfall in the background. The person is wearing a blue cap, a white tank top with purple accents, and black shorts. They are running on a large, mossy rock. The waterfall is cascading over several rocks, and the surrounding area is lush with green foliage. The image has a purple overlay on the left side where the text is located.

Questions?

RunSignup.com/trends
johanna@runsignup.com

