2021

ANNUAL INDUSTRY REPORT

Give Signup | Run Signup

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Intro and
Methodology

Tens of millions of people participate in endurance events in the United States each year, and across the country people dedicate their lives and earn their livelihoods from the creation of those events. Despite the size of the industry, there is no singular aggregator of data for endurance events, and insight into the state of the market has remained 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 of the results, our large sample size makes it a robust source of information about the current health of the industry. Anywhere we believe the particulars of our platform may make our results different from the broader market, it is indicated in the description of the data. With our comprehensive data source — estimated to be around 30–40% 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 quantify and explore:

- **The rate and trajectory of COVID-19 recovery**
- **The shifting prevalence of in-person and virtual events**
- **Patterns in participant registration**
- **The success of various promotional strategies**
- **Trends in peer-to-peer fundraising events**
- **The impact of technology on event day**

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 2020, 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.

Summary
A Return to Normal?

After a tumultuous 2020, the theme of 2021 was simple: recovery and adaptation. While the seventh iteration of this report still reflects uncertainty and interruption, the overall patterns show a clear and defined trend back towards "normal". In-person events are back, the timing of registrations resembles pre-pandemic years, prices are swinging closer to 2019 levels, and the results of key promotional strategies are remarkably similar to previous years.

Normal, of course, may still look a little different in the future. Virtual events, while their prominence will likely continue to fade, are here to stay. Tools like QR codes, RaceJoy runner tracking, and the RaceDay CheckIn App have permanently shifted expectations around efficiency and experience on event day. The lessons learned from a hybrid year will help event organizers stay nimble and manage a variety of unexpected circumstances in the future, from a fallen tree on a race course to major weather events.

There are still significant challenges in the coming year if the industry wants to close the gap and regain the approximately 23% of participants who did not return in 2021. First, innovation and creativity are required to re-engage younger participants while bringing new, often older virtual participants into the fold. Second, event directors will need persistence and flexibility to rebuild trust and loyalty and re-institute themselves as reliable community traditions.

While some events from 2019 will never resume, participant enthusiasm for events has returned, making the theme for 2022 equally simple:

opportunity.

Data **Set**

These numbers represent all the events and registrations on RunSignup between 2017 and 2021, with a year defined as 12/1 of the previous year through 11/30 of the stated year. Because the platform has seen growth in the form of increased market share, growth here cannot be taken as a representation of growth across the industry.

For a look at year-over-year participation growth or decline between the same cohort of events, see section 1.1. These charts should be used simply to gain a better understanding of the data that was analyzed.

Events on RunSignup

Event Type	2017 # Events	2018 # Events	2019 # Events	2020 # Events	2021 # Events
Overall	35,376	42,738	49,671	46,893	59,885
5K and less	19,588	23,731	27,716	24,407	30,140
10K and less	3,295	4,022	4,671	5,046	6,142
Half Marathon and less	2,033	2,571	2,974	3,572	4,091
Marathon and less	796	1036	1233	1640	1,971
Ultra	677	853	1,073	2,256	2,585
Triathlon	913	1,205	1,343	956	1,518
Unknown	8,074	9,320	10,661	9,016	13,438

Data **Set**

Because there is no single aggregator of event data in the US, there is not a precise determination of the market. However, from our best pre-pandemic analysis of data from Running USA[1] (reported 18.1 million registrations in 2019), online race calendars, and worldwide endurance industry estimates from Eventbrite[2], we estimate that the pre-COVID US market was in the range of 22-30 million registrations.

Registrations on RunSignup

Event Type	2017 # Events	2018 # Events	2019 # Events	2020 # Events	2021 # Events
Overall	5,249,820	6,177,666	7,312,022	4,713,380	6,385,666
5K and less	3,063,399	3,715,467	4,580,738	2,677,195	3,810,273
10K and less	719,224	826,018	912,394	498,424	691,264
Half Marathon and less	707,912	798,872	873,443	564,017	632,755
Marathon and less	141,807	182,903	192,854	151,629	184,004
Ultra	64,990	78,893	109,810	290,792	259,726
Triathlon	78,615	94,842	106,087	36,554	116,272
Unknown	473,873	480,671	536,696	494,769	691,372

Our best estimation is that the 6,385,666 registrations on RunSignup in 2021 **represents at least 30-40% of the US race registration market.**

1. Running USA 2019 U.S. Running Trends Report
2. Eventbrite IPO

Participants are appreciative and very grateful that we tried something last year and that we're bringing back the virtual option this year. This is a race for a cause – it's a small community and we have a lot of repeat participants and it's so important to keep the lines of communication open."

- MINDY CONKLIN
Hitting Cancer Below the Belt
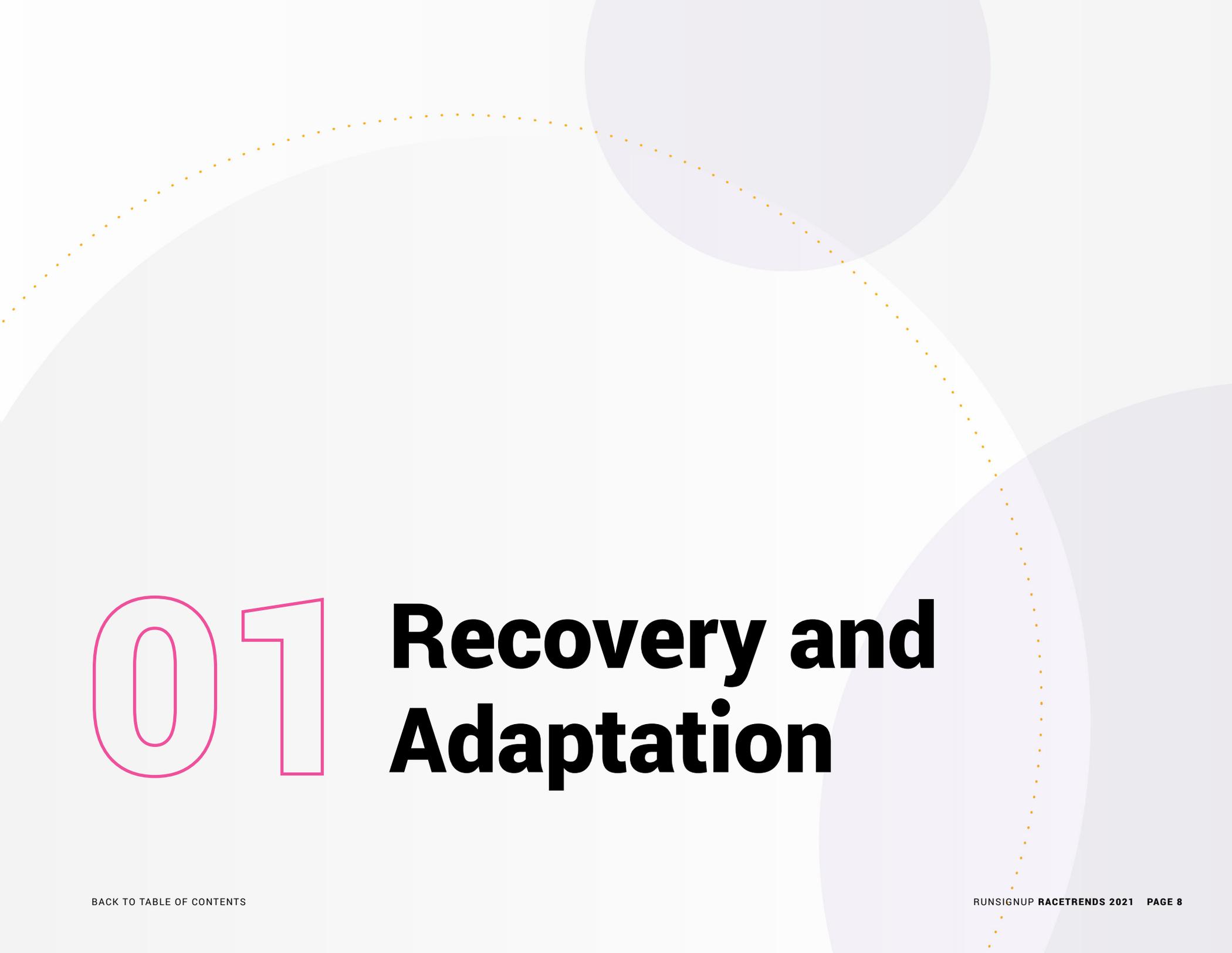
01 Recovery and Adaptation

Recovery and Adaptation

Key Findings and Trends

- While events **grew an average of 21.6% compared to 2020**, the impact of the pandemic is clear when looking at participation in 2021 versus 2019. On average, **participation in events fell 23% compared to 2019**.

- The shifting event types, from in-person to virtual and back again, has made it harder to attract repeat participants, with just **12% of 2020 participants returning to the same event in 2021**.

- Fall registrations remained artificially high due to event postponements, with a **record 15.3% of events taking place in October**. However, the overall distribution of events returning inched closer to pre-pandemic patterns.

- There continues to be a significant churn of events, with **18% of the events from the second half of 2019 not occurring in 2021**.That includes 10.7% of events that skipped both 2020 and 2021.

Conclusions and Recommendations

- **Recovery is still in progress.** Re-engage lapsed participants with loyalty programs, build trust via transparency and flexible participant management options, and get creative with a bold experience to attract newer, younger participants to your events.

- **Loyalty has been impacted by broken traditions.** Rebuild your base by engaging the participants who have continued to join your events over the last two years as ambassadors, implementing robust referral rewards programs and incentives for teams.

- **Refine your event day processes to help keep your events safe and on-schedule.** With less tolerance for cancellations and postponements, modifications to your start line and packet pickup can help your events stay up and running.

- **It's likely that a number of pre-pandemic races won't return.** Take advantage of the gaps in the racing schedule to build out innovative new events for your community.

1.1
Participation Rates

Overall Growth
21.6%
Compared to 2020

The headline here is that event participation in 2021 was up compared to 2020, but still lags behind 2019 levels. To get to that conclusion, we used a few different reports that looked at events that were on our platform in two different years (2021 and either 2020 or 2019). This helps us to better understand the impact on individual events without skewing from new events and platform growth.

2021 Compared to 2020

First up is our annual analysis comparing the number of participants among events that were on our platform in both 2020 and 2021. From this, it's clear that most events were able to grow this year compared to last, with an 21.6% increase in participation for this set of events.

Growth was seen across all distances aside from ultramarathons, where the decrease in virtual challenges (often classified as ultramarathons because they exceed 26.2 miles) in 2021 may be a factor.

Change in Event Participation 2020 to 2021

Event Type	# Events 2020	# Events 2021	# Participants 2020	# Participants 2021	Growth
Overall	25,750	30,573	2,931,698	3,563,568	21.6%
5K and less	12,581	15,139	1,627,902	2,087,625	28.2%
10K and less	2,889	3,475	387,897	462,989	19.4%
Half Marathon and less	2,224	2,363	400,095	423,101	5.8%
Marathon and less	1003	1,060	87,832	109,334	24.5%
Ultra	995	1,654	141,748	120,203	-15.2%
Triathlon	581	828	23,733	63,733	168.5%
Unknown	5,477	6,536	268,122	296,583	10.6%

2021 Compared to 2019

The unusual circumstances of 2020 and 2021 make our normal comparison of consecutive years less useful than usual. Many events cancelled in 2020 and thus do not show up on the report (leading to a smaller sample size), and many that did take place were artificially reduced in size in 2020. To counter that, we also pulled a separate comparison that looked at participation numbers in 2019 and 2021 in events that were on the platform both years.
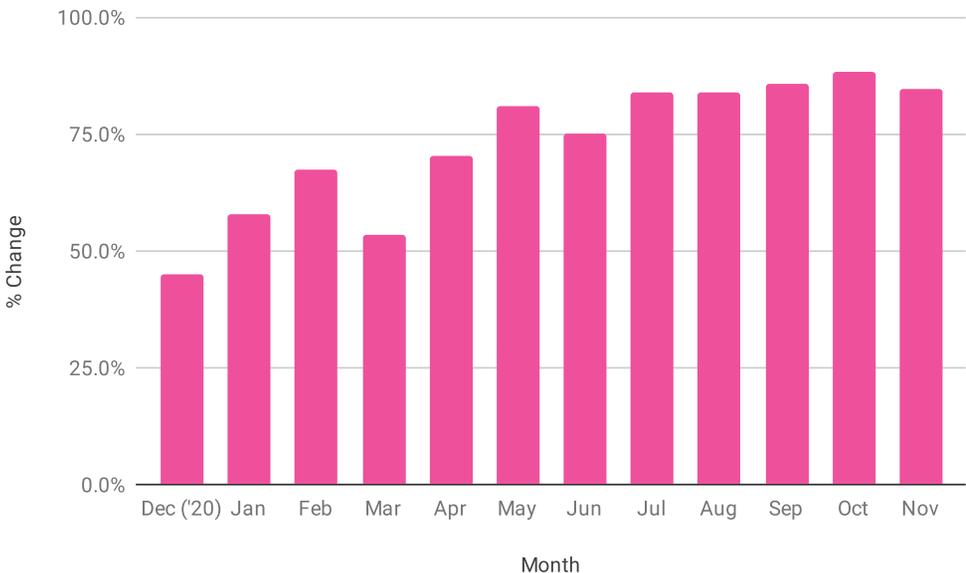
From this, we can see the continued impact of COVID-19 on the endurance industry, with the average race seeing a 23% decrease in participation in 2021 compared to 2019. This did improve throughout the year, though, and in the best month, October, average participation was only down 11.9%.

Change in Event Weekend Participation 2019 to 2021

Month	2019 Participants	2021 Participants	% Change
Dec ('20)	109,370	49,334	-54.9%
Jan	69,125	39,934	-42.2%
Feb	81,831	55,245	-32.5%
Mar	167,155	88,949	-46.8%
Apr	179,328	125,775	-29.9%
May	237,501	192,230	-19.1%
Jun	201,404	150,972	-25.0%
Jul	188,173	157,589	-16.3%
Aug	172,337	144,265	-16.3%
Sep	348,724	299,392	-14.1%
Oct	336,360	296,396	-11.9%
Nov	781,152	659,423	-15.6%

Note: This report differs from the first one in a few ways: First, it is looking at the numbers from an overall event weekend, regardless of the number of distances or options within the event (I.E., the Philadelphia Marathon with an 8K, half marathon, and full marathon 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 report by month only includes events in which the 2019 and 2021 version were held in the same month, omitting some events that may have postponed to a different date within the 2021 calendar year. The overall figure of 23% decrease for the year does include events that postponed to a later 2021 date.

While variable restrictions impacted specific events and municipalities, the lingering impact of the pandemic was relatively consistent across the country. Broken down by regions (we set the regions as defined by the Bureau of Economic Analysis), all but one region saw an average drop of 21-25% in participation. The outlier, the Rocky Mountain Region with just a 15% drop, is also the region with the fewest repeat events represented and is thus the most likely to be affected by a few highly successful events.

Drop In Participation in 2021

23%

Compared to 2019 For Events on the Platform in Both Years

Percent of 2019 Participants

Regional Change in Event Weekend Participation 2019 to 2021

	2019 Participants	2021 Participants	% Change
Far West	313,881	239,276	-24%
Great Lakes	753,975	569,469	-24%
Mideast	762,658	599,902	-21%
New England	199,069	156,006	-22%
Plains	184,805	137,784	-25%
Rocky Mountain	165,893	140,704	-15%
Southeast	1,039,862	799,903	-23%
Southwest	315,121	238,705	-24%

Percent of 2019 Event Weekend Participation
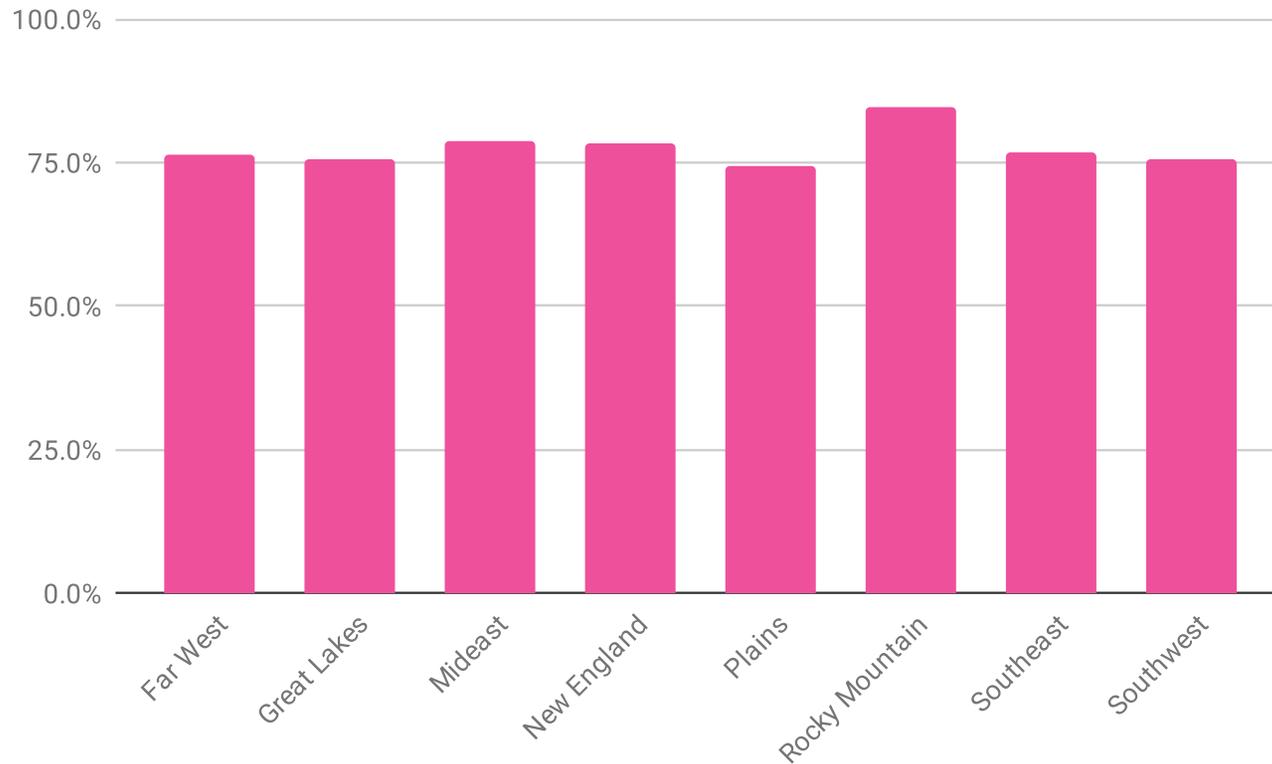
Regions as defined by the Bureau of Economic Analysis
Far West: AK, CA, HI, NV, OR, WA
Great Lakes: IL, IN, MI, OH, WI
Mideast: DE, DC, MD, NJ, NY, PA
New England: CT, ME, MA, NH, RI, VT

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 piece of data that we looked at was our internal weekly transaction report. This one is affected by new events and increased use of our platform and does not reflect the experience of an individual event director, however, it helps give an overview of the rhythm of recovery in 2021. The overarching pattern is clear. The year began with lower transaction volumes, surpassed 2019 transaction volumes mid-year, and closed out with a solid lead over 2019.

The other important visual here is how normal the transaction pattern was. Whether overall transactions for a specific week were below or above 2019 levels, the spikes and valleys were remarkably similar, suggesting that our traditional event patterns are resuming.

Weekly Transactions 2019 to 2021

Legend: 2019 Weekly Transactions — 2021 Weekly Transactions
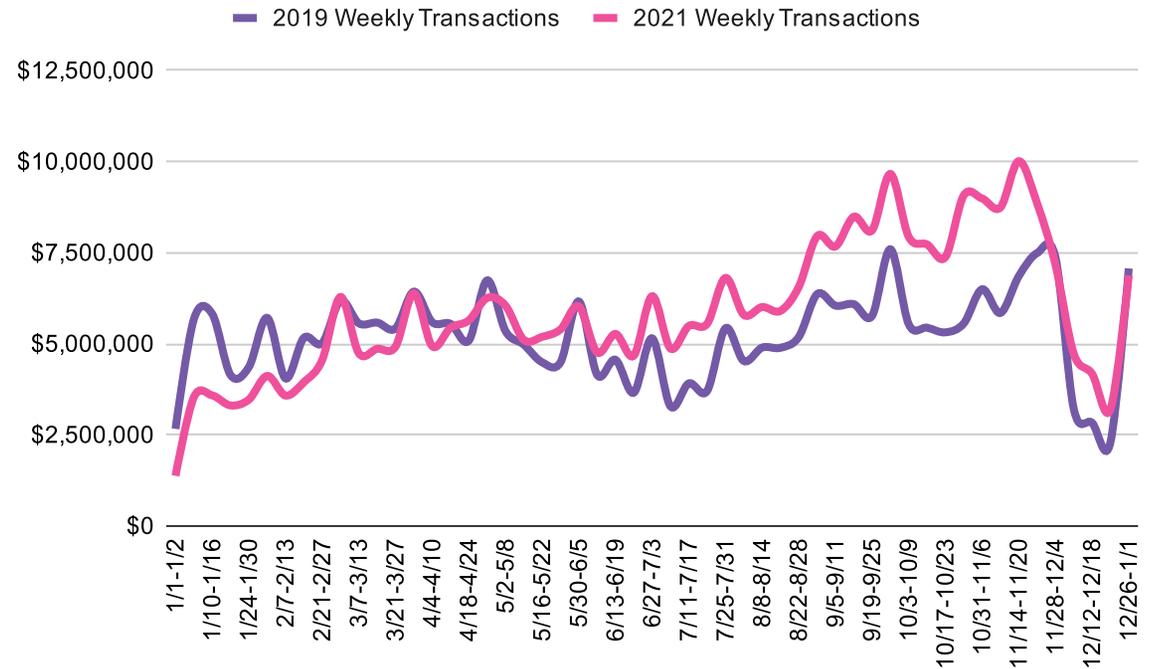
Takeaways

• Events have recovered significantly compared to 2020 but they still saw an average 23% decline in participation compared to 2019, with events earlier in the year hit the hardest. Consider loyalty programs and callbacks to vintage swag to re-engage pre-pandemic participants who have been slow to return.

• Don't abandon virtual options entirely without a plan to integrate your virtual participants into on-site events. They continue to boost overall registrations and ensure financial viability for many events.

1.2
Repeat Participation

12%
of 2020 Participants
Returned to the Event
in 2021

With market uncertainty and the subsequent shifting of event types between in-person and virtual, relatively few 2020 participants joined the same event in 2021. Twelve percent of participants repeated in 2021, a slight improvement over the 10.1% seen in 2020, but still a significant drop from the 18.4% who returned between 2018 and 2019.

While it's a number to watch as the events stabilize, the decline in repeat participation in 2020 and 2021 can likely be attributed to the flip-flopping of races from in-person to virtual and back again, with the runner profiles differing for different event types.

■ # Registrations 2020   ■ Repeat % 2021

Race Type

- Overall
- 5K and less
- 10K and less
- Half Marathon and less
- Marathon and less
- Ultra
- Triathlon
- Unknown

0   1,000,000   2,000,000   3,000,000

Number of Registrations
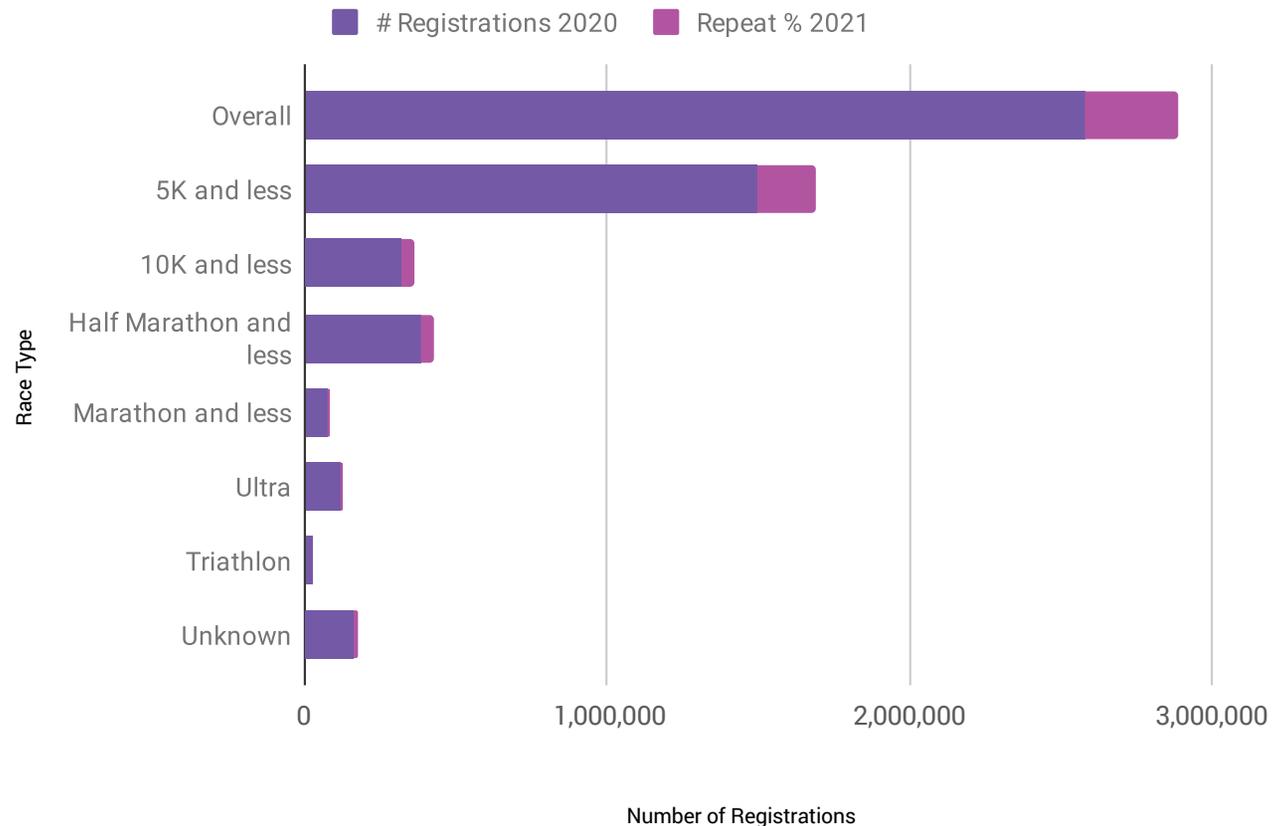
Repeat Participation by Year

Event Type	Repeat % 2017	Repeat % 2018	Repeat % 2019	Repeat % 2020	Repeat % 2021
Overall	17.3%	18.5%	18.4%	10.1%	12.0%
5K and less	16.7%	17.9%	18.4%	9.9%	12.7%
10K and less	24.6%	24.0%	21.7%	11.9%	13.1%
Half Marathon and less	18.5%	20.3%	19.7%	11.5%	11.0%
Marathon and less	11.5%	14.3%	14.4%	7.2%	9.5%
Ultra	13.6%	13.5%	13.9%	8.1%	6.6%
Triathlon	10.1%	9.1%	8.0%	4.4%	7.9%
Unknown	10.2%	12.4%	13.1%	7.8%	11.5%

13.1% Repeat 10K Runners in 2021 vs
24.6% Repeat 10K Runners in 2017

Takeaways

- Events have recovered significantly Take the initiative to reach out to past participants across years. Loyalty programs and reserved entries can help you show your previous participants that you haven't forgotten them and are excited to welcome them back to your events.

- With so many non-traditional events over the last two years, many new participants may not be used to a "normal" race day. Consider beginner-friendly distances, fun themes, and social teams to help ease previously virtual participants into in-person racing.

- Provide virtual opportunities, either as standalone events or alongside your in-person events, to keep the pipeline of virtual-to-real participation open – and expand your base of potential participants.

1.3
Distribution of Events

The distribution of events in 2021 tilted towards the fall as spring events were cancelled or delayed to allow for distribution of the COVID-19 vaccine and the subsequent increase in outdoor gathering limits.

Over the last two years, October has overtaken September as the most heavily populated month for events; it remains to be seen if that will revert as postponed events return to their spring dates.
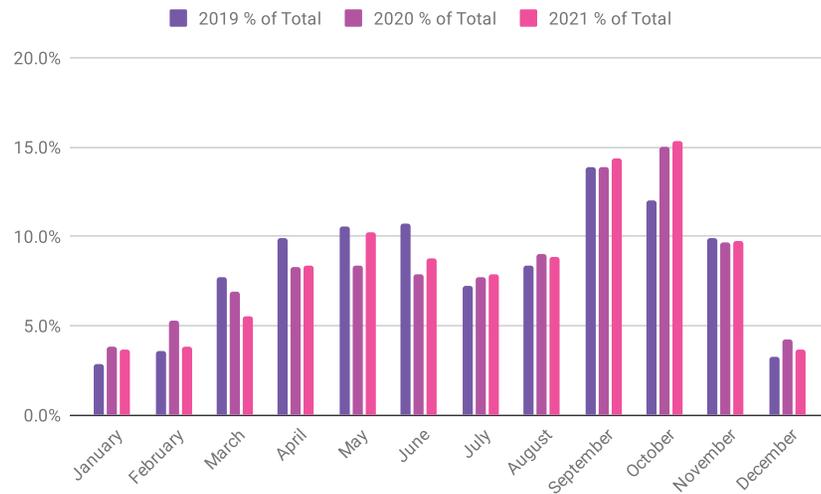
Month	2017 % of Total	2018 % of Total	2019 % of Total	2020 % of Total	2021 % of Total
January	3.2%	3.2%	2.8%	3.8%	3.6%
February	3.7%	3.7%	3.6%	5.3%	3.8%
March	6.2%	7.2%	7.7%	6.9%	5.5%
April	11.9%	11.4%	9.9%	8.3%	8.4%
May	10.6%	10.2%	10.6%	8.4%	10.2%
June	9.8%	10.4%	10.7%	7.9%	8.7%
July	7.9%	7.6%	7.2%	7.7%	7.9%
August	7.9%	7.7%	8.3%	9.0%	8.8%
September	13.5%	14.5%	13.9%	13.8%	14.3%
October	13.5%	12.0%	12.0%	15.0%	15.3%
November	8.7%	8.9%	9.9%	9.6%	9.7%
December	3.1%	3.2%	3.3%	4.2%	3.7%

15.3%
of 2021 Events Took Place in October

While weekends continue to dominate the racing industry, with 74.5% of all events taking place on a Saturday or Sunday, the proliferation of virtual and nontraditional events has led to more events on weekdays. In particular, virtual events and challenges often begin on the first day of the week or a set point in a month (like the 1st or 15th), leading to more events that begin mid-week.
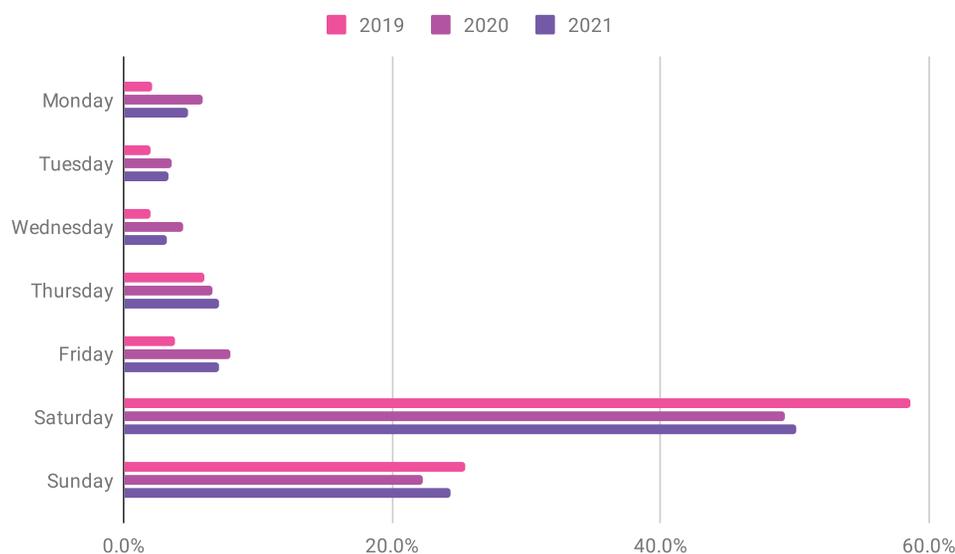
If an event was multiple days, the day reported is the first day of the event.

Day	2017	2018	2019	2020	2021
Monday	2.3%	2.5%	2.1%	5.8%	4.8%
Tuesday	2.9%	1.7%	2.0%	3.5%	3.3%
Wednesday	2.2%	3.2%	1.9%	4.4%	3.2%
Thursday	4.5%	4.6%	6.0%	6.6%	7.0%
Friday	4.0%	3.7%	3.8%	8.0%	7.1%
Saturday	58.4%	58.8%	58.6%	49.3%	50.1%
Sunday	25.7%	25.5%	25.4%	22.3%	24.4%

Takeaways

- While there may still be some disruptions to the event calendar, look for 2022 event distribution to more closely resemble 2019. With municipalities more comfortable with outdoor events and established processes for modifying events, we expect to see a return to a robust spring race season.

- Looking for an event weekend with little competition? The one monthly trend that has held throughout the last few years is that the winter months – especially December, January, and February – lag behind the rest of the year. Get creative with a winter race designed for hardy participants looking for a challenge!

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.

Due to the unique nature of event cancellations in 2020 and 2021, we are looking only at the churn data between July-December of 2021, and comparing it to events during that period of 2019 rather than in 2020.

Percent of Churn Compared to 2019 Event Totals
(over 500 Participants)
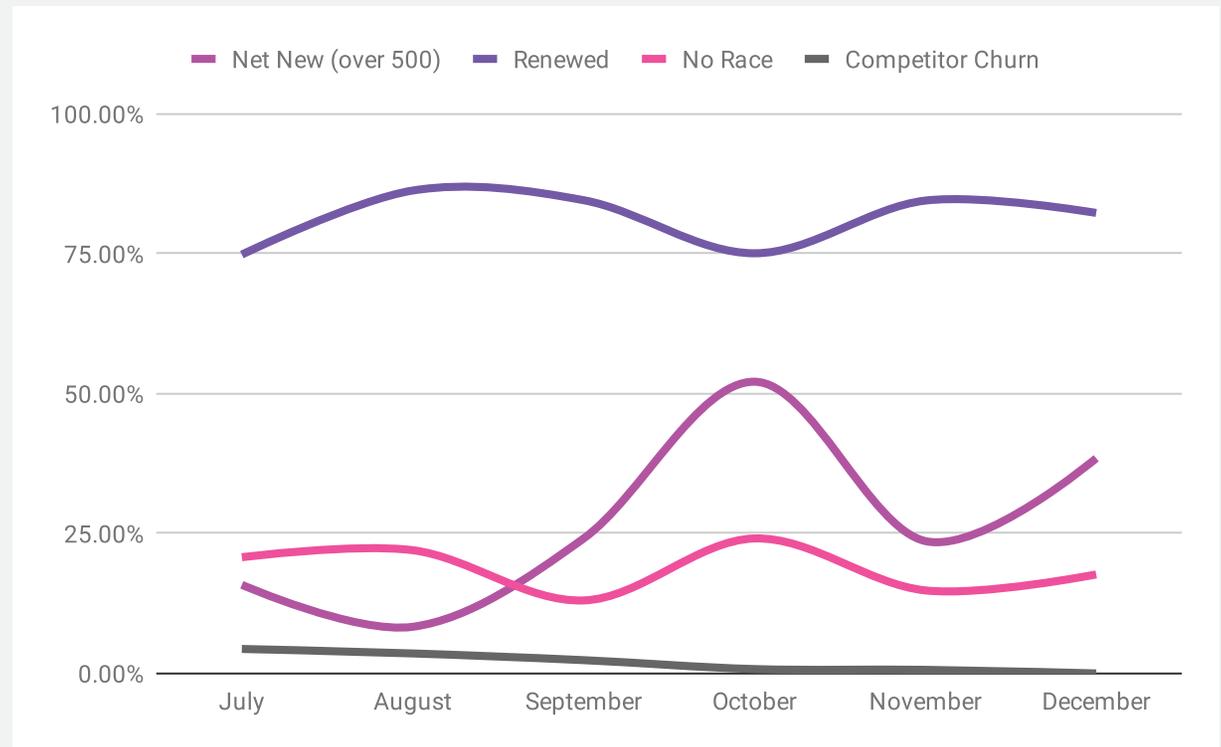
Event Type	Total Events Over 500 In 2019	Total Events Over 500 in 2021	Net New 2020/2021	Renewed (Same Month)	Renewed (New Month)	Churn: 2020 Event, But No 2021	Churn: No Event 2020 or 2021	Competitor Churn #	No Event Churn %	Competitor Churn Percent
July	183	166	29	121	16	16	22	8	20.8%	4.4%
August	168	159	14	121	24	26	11	6	22.0%	3.6%
September	253	275	61	177	37	14	19	6	13.0%	2.4%
October	257	327	134	172	21	26	36	2	24.1%	0.8%
November	465	503	110	373	20	13	56	3	14.8%	0.6%
December	130	157	50	99	8	11	12	0	17.7%	0.0%
Total	1456	1587	398	1063	126	106	156	25	18.0%	1.7%

The overall churn rate for events that did not recur during this six-month period was 18%. In comparison, it was 5.9% in 2019 and a whopping 38.4% in 2020. One other key data point that illustrates the unusual patterns of 2021: 10.6% of the 2019 events that did recur in 2021 were held in a different month than in 2019.

10.7% of 2019 Events Did Not Recur in 2020 OR 2021
7.3% of 2019 Events Were Held in 2020, But Not in 2021
*Only includes the second half of each year.

Competitor Churn 2018-2021

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

Competitor Losses	2018	2018 %	2019	2019%	2020	2020%	2021	2021%	Total
New Events	710		834		1,027		1,320		3,891
EnMotive	6	0.4%	3	0.2%	38	2.6%	27	4.4%	74
RaceRoster	4	0.3%	16	0.8%	8	0.6%	9	1.5%	37
ItsYourRace	5	0.3%	3	0.2%	1	0.1%	2	0.3%	11
Active	0	0.0%	2	0.1%	6	0.4%	2	0.3%	10
CT/Athlinks	6	0.4%	1	0.1%	1	0.1%	2	0.3%	10
Events.com	2	0.1%	3	0.2%	2	0.1%	3	0.5%	10
Showclix	0	0.0%	8	0.4%	0	0.0%	0	0.0%	8
RaceWire	5	0.3%	1	0.1%	0	0.0%	1	0.2%	7
onecause	0	0.0%	6	0.3%	0	0.0%	0	0.0%	6
Custom	0	0.0%	0	0.0%	5	0.3%	0	0.0%	5
EventBrite	1	0.1%	0	0.0%	3	0.2%	1	0.2%	5
RedPodium	2	0.1%	0	0.0%	2	0.1%	1	0.2%	5
BlackBaud	4	0.3%	0	0.0%	0	0.0%	0	0.0%	4
elitefeats	0	0.0%	2	0.1%	2	0.1%	0	0.0%	4
RaceEntry	2	0.1%	0	0.0%	1	0.1%	1	0.2%	4
Vertical Runner	1	0.1%	2	0.1%	0	0.0%	1	0.2%	4
Classy	2	0.1%	0	0.0%	1	0.1%	0	0.0%	3
GetMeRegistered	1	0.1%	0	0.0%	2	0.1%	0	0.0%	3
Haku	2	0.1%	0	0.0%	0	0.0%	1	0.2%	3
Lightbox Registrations	1	0.1%	1	0.1%	0	0.0%	1	0.2%	3
Qgiv.com	0	0.0%	0	0.0%	1	0.1%	2	0.3%	3
RacesOnline	2	0.1%	1	0.1%	0	0.0%	0	0.0%	3
Other	8	0.5%	8	0.4%	8	0.6%	26	4.2%	50

Takeaways

- Some events that cancelled in 2020 may not be returning, with 10.7% of 2019 events skipping both 2020 and 2021. This opens new opportunities for ambitious race directors and timers to introduce new concepts to their communities and capture some of the participants from events that have disappeared.

- If you have missed the last two years and want to get back on the event calendar in 2022, start communicating with your previous participants **now**. When coming back from an absence, it's more important than ever that you remind your supporters of what makes your event special.

1.5

COVID-19 and Timers

Timers are the backbone of the endurance industry and provide good insights into the trends in the industry. We used a combination of scoring data and our annual timer market survey to shine some light on the return of events in 2021.
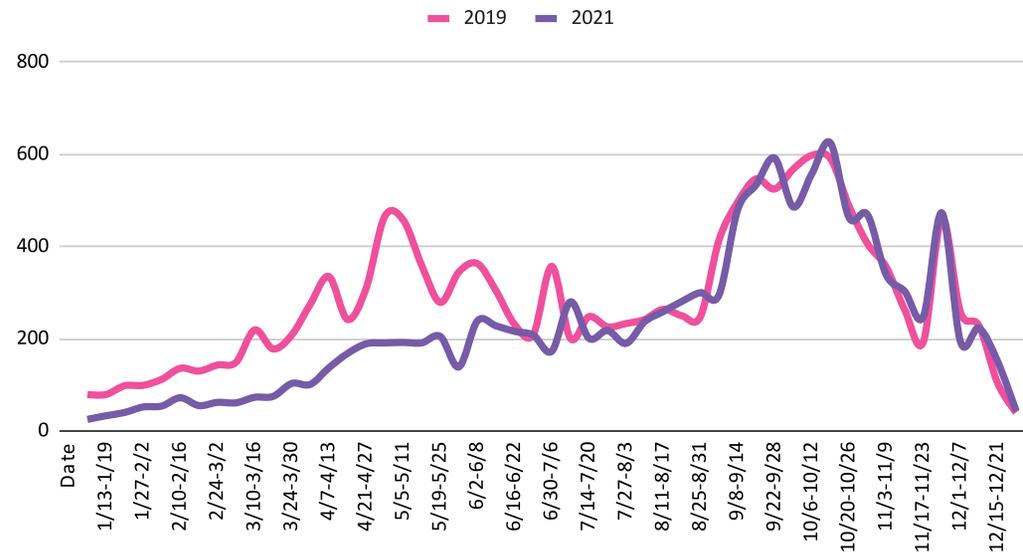
Timed Events in 2021

To start with, we collected data from a few of the major scoring software providers in the industry and compared the number of events they timed in 2019 to their event count in 2021.

First, we looked at The Race Director and the next generation software, RaceDay Scoring. Aggregate data shows progress throughout the year, with fewer than half as many scored races in early Q1, but slightly more timed races in 2021 than in 2019 by the end of the year.

Despite a slow start, the end of 2021 saw a similar number of timed events as in 2019.

## RaceDay Scoring and Race Director Timed Events

Timed Events in 2021 as % of 2019 Events (by Date)
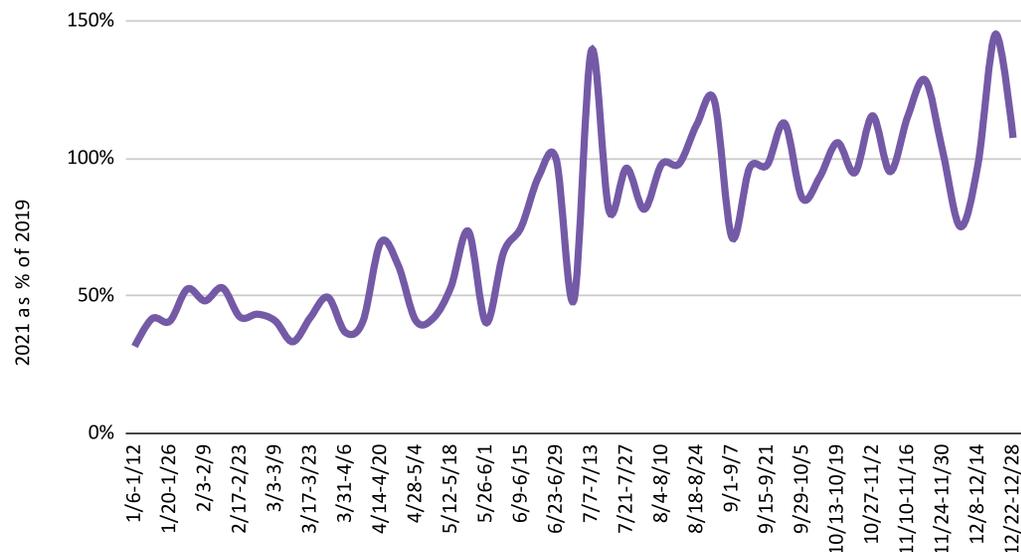
RunScore Timed Races 2019-2021

In addition to our data on RaceDay Scoring and The Race Director, Alan Jones, the founder of RunScore (now owned by Race Roster) shared data from his software for a more complete picture of the industry. The conclusion is similar : after a quiet Q1, timed races began to return through the summer and fall, with October 2021 actually seeing more timed events than the same month in 2019.

RunScore Races

Legend: RunScore Races 2019 ■ RunScore Races 2020 ■ RunScore Races 2021
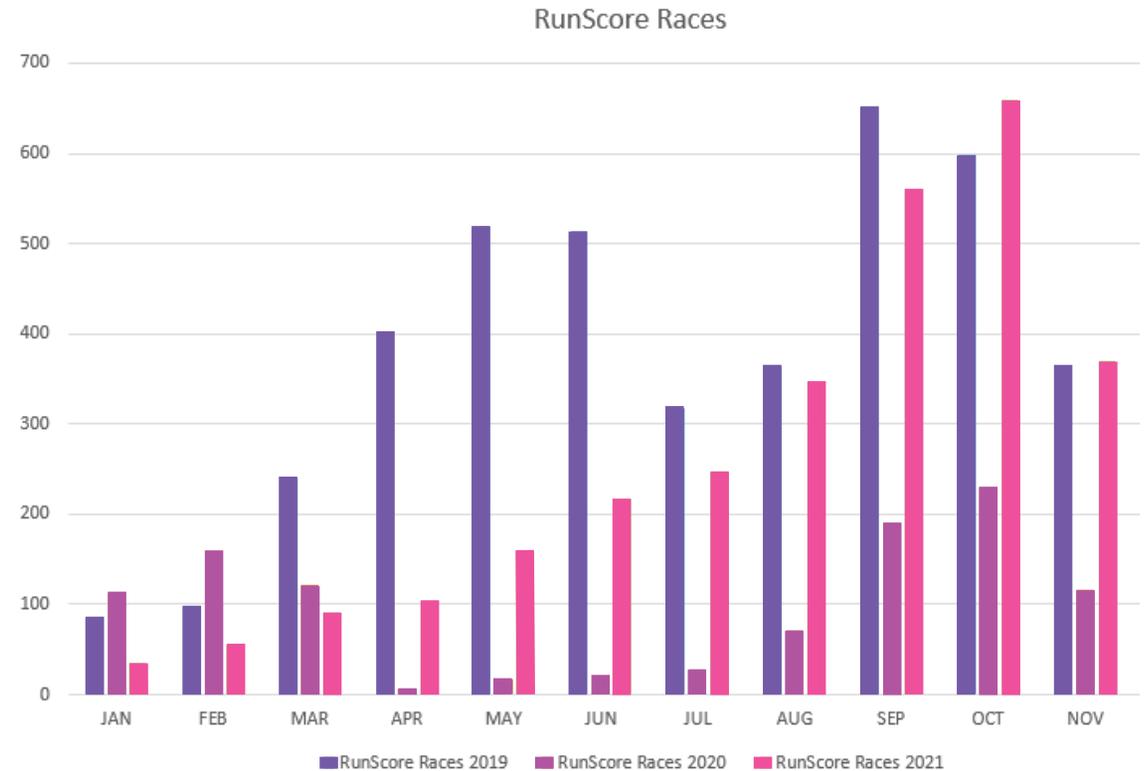
Timer Perception

The remaining data for this section is pulled from our 2021 Timer Survey, and is used to evaluate the perception timers have of the industry at this moment. For more information about the purpose and methodology of that survey, see section 6.

We asked timing companies to share their experience recovering from the COVID-19 pandemic, including how many of their events have cancelled, included a virtual option, or seen participation numbers fall.

Half of all timers surveyed indicated that less than 10% of their events have cancelled without the intention of returning. While any number of permanent cancellations will have ripple effects for the industry, it is positive that only 2% of timers expected more than 50% of their events to cancel permanently.

What Percentage of Your Events Are Permanently Cancelled?

50-60%
1.4%
40-50%
3.6%
30-40%
5.7%
20-30%
14.3%

1-10%
50.7%

10-20%
22.9%
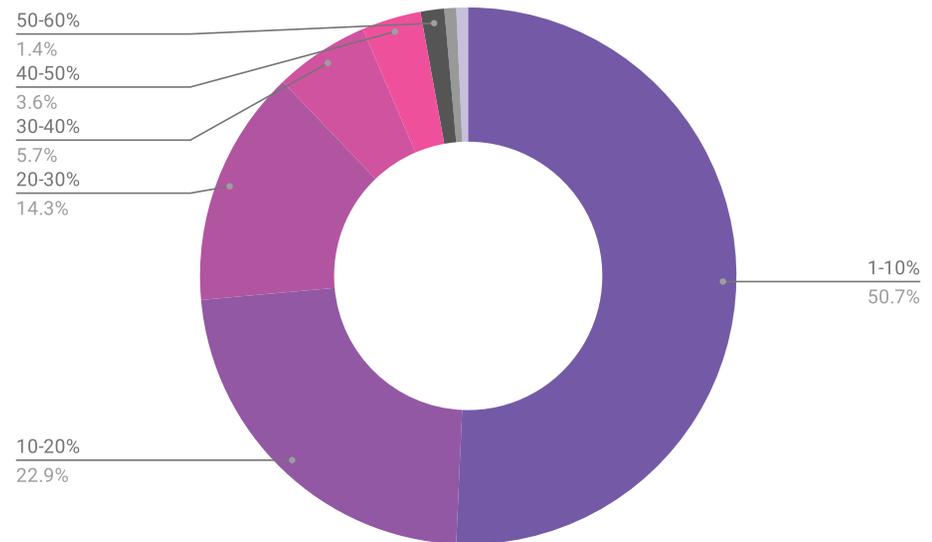
50.7% of Timers Expect Less than 10% of Their Events to Cancel Permanently
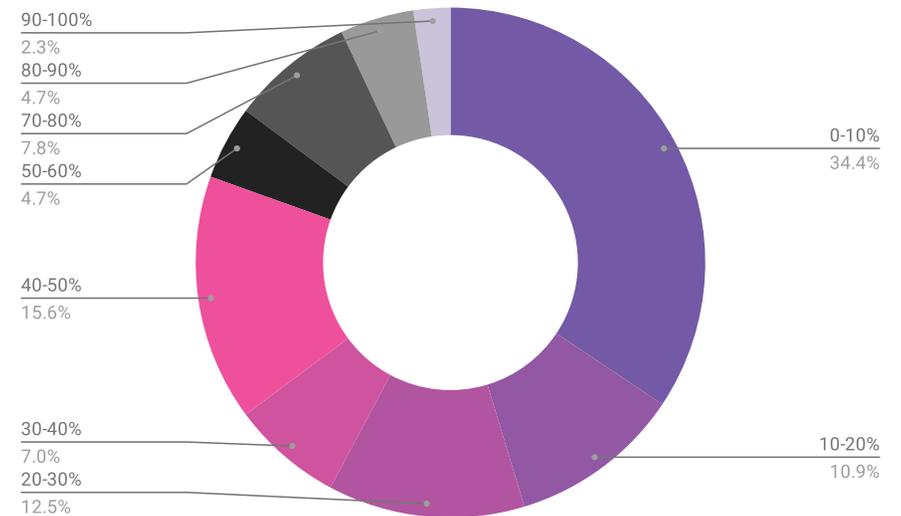
The timer survey suggests that there has been some reduction in participation for events that have moved forward, with 53.2% of timers reporting less than 90% of participants registering for their events. This is in line with the participation declines reported in section 1.1.

What Percentage of Participants Are You Seeing at Your Events?

90% or more
11.4%

25% or less
2.9%

26-50%
12.6%

76-90%
35.4%

51-75%
37.7%
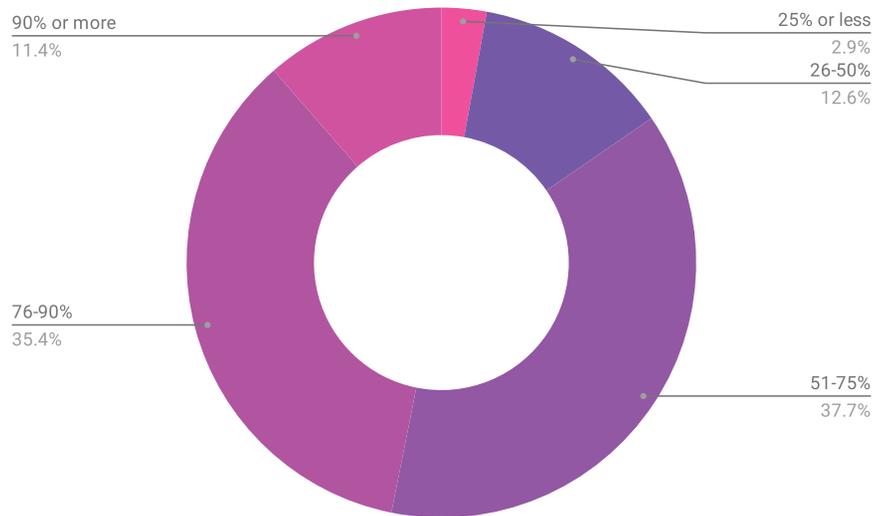
Virtual fatigue shows up in the survey. When asked whether events will offer a virtual choice in the future, more than a third responded that they expect less than 30% of their events to offer virtual moving forward. Just 20% of timers expect more than half their events to provide a virtual option.

What Percentage of Your Events Do You Expect to Offer Virtual?

90-100%
2.3%

80-90%
4.7%

70-80%
7.8%

50-60%
4.7%

0-10%
34.4%

40-50%
15.6%

10-20%
10.9%

30-40%
7.0%

20-30%
12.5%

Takeaways

- Timers are key to the success of the industry over the next few years. Now is the time to refresh your technology and reintegrate timing as an essential part of event day.

- Virtual fatigue is setting in. While we expect to continue to see far more interest in virtual than there was pre-pandemic, smaller events and those that are focused on experience may begin to opt-out of virtual options.

As the world is shifting and changing we needed many options for our program. We offered in-person, virtual, and a "fluid' option that allows girls to ebb in and out of virtual and in-person. And we took that same approach to our fundraising event and re-envisioned what could be possible."

- LIZ WIAN
Girls on the Run

02 Event Trends

Event
Trends

Key Findings and Trends

- Participants still opted for virtual at much higher rates than in 2019 but "real" events were the winner in 2021, with **in-person options making up 20.3% of events and 79.6% of participants.**

- Male participation has returned to pre-pandemic levels, with **male registants making up 42.2% of all registrations and 44% of in-person registrations.** Women still dominate (especially in virtual events) but the gap is closing slightly.

- Events struggled to capture younger participants, with **18-29 year olds making up just 12.8% of all participants.** That can be partially attributed to younger participants continuing to eschew virtual but they also represented fewer in-person participants than in 2019.

- While large, marquee events get most of the news coverage, the majority of events are small. In 2021 **83.7% of virtual events and 74% of in-person events hosted fewer than 100 participants.**

Conclusions and Recommendations

- Participants are excited to return to events. There will be ups and downs in 2022, but focus on getting your participants back in-person and providing an experience to remember.

- The profile of virtual participants is different from those that opt to join in-person. Make sure you provide a path forward for both your traditional, pre-pandemic participants and your virtual recruits from 2020 and 2021. Whether it's via hybrid events, through an annual virtual challenge, or with a beginners race series, it's vital that events help transform newer participants into regulars.

- Events have struggled to reach Millenials and Gen Z. Two things those generations report to care about? Experiences with friends, and supporting a good cause. Reach out to 18-29 year olds with social elements like teams, and appeal to their sense of good by working closely with your charity partner.

- When evaluating the state of the industry, don't let your perception be skewed by the fate of large, premier events. Look to your peers and your local community to make decisions about safety and financial viability.

2.1
Participation by Event Type

The pandemic took virtual events mainstream after years of operating on the margins of the industry. In 2021 participants flocked back to in-person events but an interest in virtual remains. More than a quarter of all 2021 events were virtual, significantly more than the 2.8% that were virtual pre-pandemic.

Percent of Events by Type

Event Type	2017 % of Events	2018 % of Events	2019 % of Events	2020 % of Events	2021 % of Events
In-Person	98.1%	97.9%	97.2%	59.8%	74.8%
Virtual Event	1.9%	2.1%	2.8%	33.9%	20.3%
Virtual Challenge				6.3%	4.9%

25.3% of events in 2021 were virtual events or challenges
**2.8%** of events in 2019 were virtual

Registrations by Event Type

Event Type	2017 % of Registrations	2018 % oof Registrations	2019 % of Registrations	2020 % of Registrations	2021 % of Registrations
In-Person	99.2%	99.2%	99.0%	59.8%	79.6%
Virtual Event	0.8%	0.8%	1.0%	33.4%	15.9%
Virtual Challenge				6.7%	4.5%

Participants continued to register for the virtual events offered, with 20.4% of all 2021 registrations coming from virtual events or challenges. Some, but likely not all, of these virtual registrations came in events that are traditionally in-person but were forced to go virtual due to COVID-19.

Percent of Registrations by Event Type

The percentage of events that were in-person increased gradually throughout the year, with a slight reversion in early fall as news of the Delta variant spread.
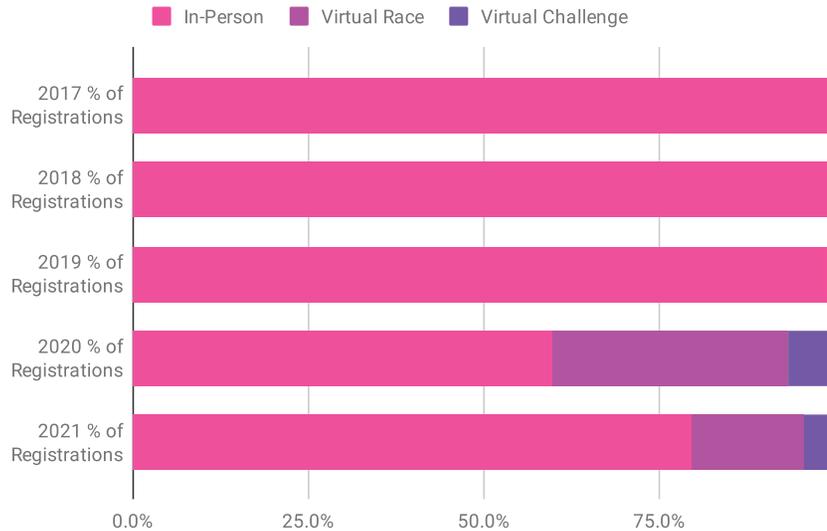
Registration Distribution by Month

Regardless of the event type chosen, it's important for event directors to understand and highlight the unique *benefits* of that event type.

- **In-Person Events** are popular for their competitive possibilities, camaraderie, and joyful on-site experiences.

- **Virtual Events** are popular for their flexible schedules and locations, unique swag options, and beginner-friendly logistics.

- **Virtual Challenges** are popular for their sense of accomplishment, creative themes, inclusiveness, and value (lasting weeks or months at a low cost).
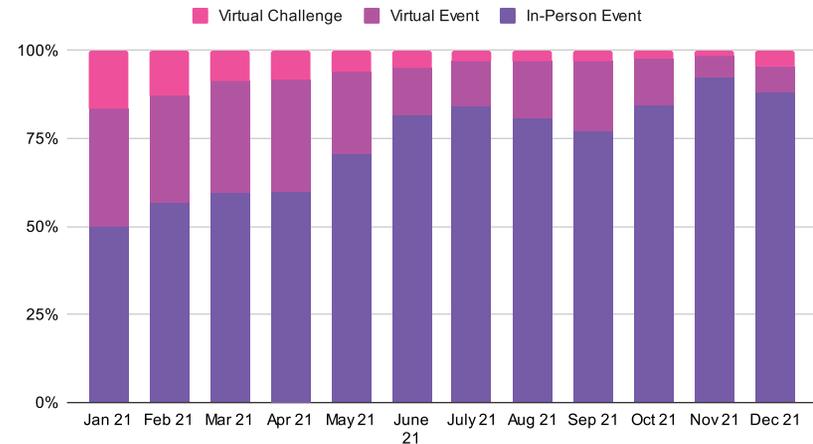
Takeaways

- There is room for a variety of event types within the endurance industry. Regardless of the event type you choose, *quality* will be the most important predictor of success. If you continue to offer virtual events or options, make sure you put the same thought and attention into a virtual event that you do for a live one. This means adding experiential elements (like runner tracking and spectator cheers), high-quality swag items, and an engaging theme or concept.

- If you're shifting away from virtual, make sure you don't abandon your new virtual participants along the way. Provide beginner-friendly distances, encourage social teams to help newer runners gain confidence, and carefully craft your messaging to participants who previously only joined virtually.

2.2
Participant Demographics

After a noticeable shift in 2020, the overall gender breakdown in 2021 reverted to a pattern similar to that of 2019. Although the return of in-person events brought men back, males continue to trail females in overall participation, making up 42.2% of the total field.

More participants than ever indicated neither a male nor a female gender, likely due to both an increase in virtual and non-competitive events in which gender is not collected and an increase in alternative options for gender identity. In future years, more flexible gender options in registration will likely create further shifts.

Overall Participation by Gender

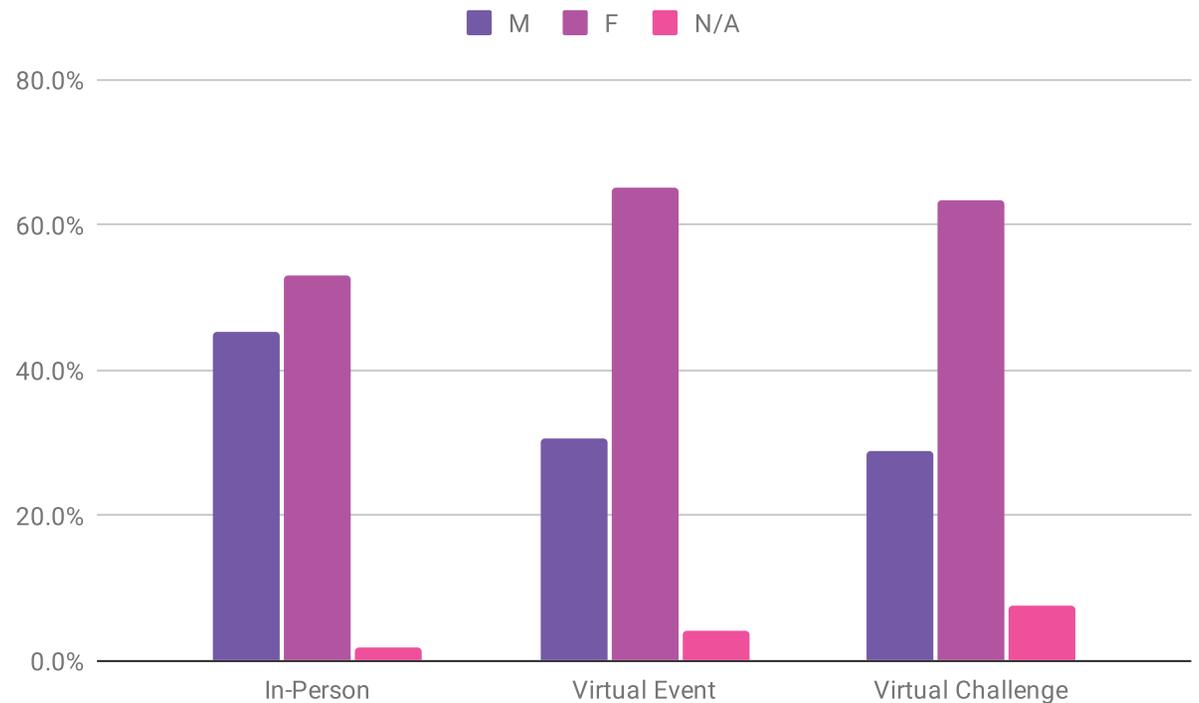| Gender	2017 % of Total	2018 % of Total	2019 % of Total	2020 % of Total	2021 % of Total	% Change 2019-2021	% Change 2020-2021
Male	41.3%	42.5%	42.8%	39.8%	42.2%	-1.5%	5.6%
Female	56.7%	56.5%	55.8%	58.3%	55.4%	-0.7%	-5.2%
N/A	2.0%	1.0%	1.4%	1.9%	2.4%	74.7%	21.6%
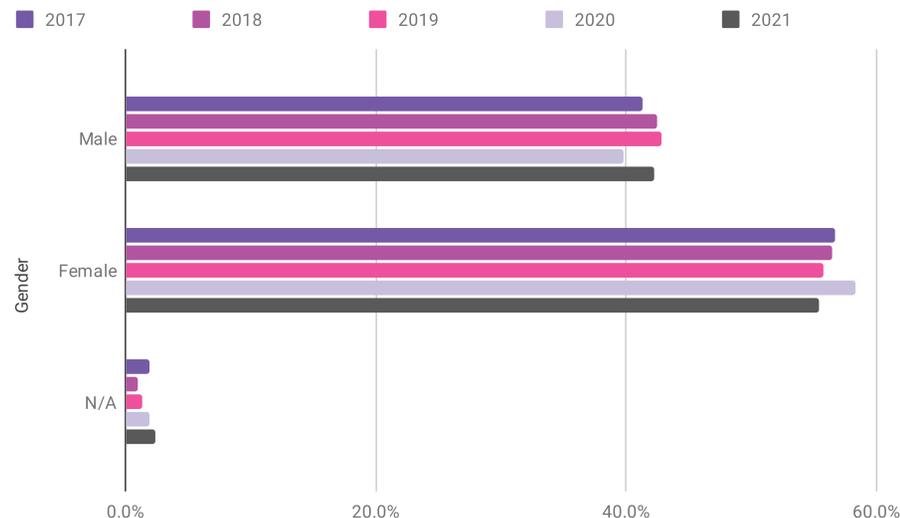
55.4% of 2021 Participants Identified As Female

Gender by Event Type

Female participation exceeds male participation in every type of event, but the discrepancy is most obvious in virtual events. While a slight majority (53%) of in-person participants identify as female, 65% of virtual events and 63% of virtual challenge registrants are female. It is worth noting that the gender gap in virtual events was actually even greater pre-pandemic, with females making up 72.2% of virtual participants in 2019.

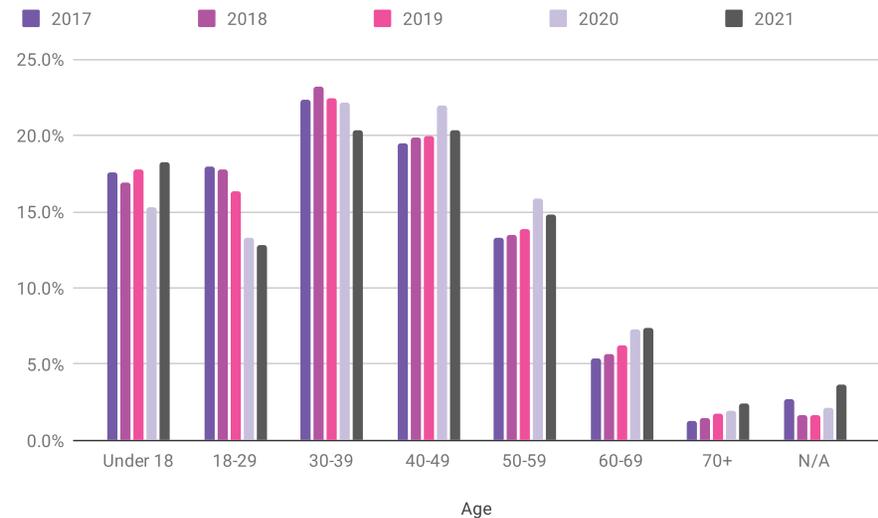| Gender	2019 In-Person	2019 Virtual	2020 In-Person	2020 Virtual	2020 Virtual Challenge	2021 In-Person	2021 Virtual	2021 Virtual Challenge
Male	43.0%	25.1%	44.0%	33.7%	32.6%	45.3%	30.6%	29.0%
Female	55.6%	72.2%	54.5%	63.6%	65.3%	53.0%	65.1%	63.3%
N/A	1.4%	2.7%	1.4%	2.7%	2.1%	1.7%	4.3%	7.7%

Overall Participation By Age

Age	2017 % of Total	2018 % of Total	2019 % of Total	2020 % of Total	2021 % of Total	% Change 2019-2021	% Change 2020-2021
Under 18	17.6%	16.9%	17.8%	15.3%	18.3%	2.7%	16.1%
18-29	17.9%	17.7%	16.4%	13.3%	12.8%	-21.9%	-4.3%
30-39	22.3%	23.2%	22.4%	22.2%	20.3%	-9.2%	-8.9%
40-49	19.5%	19.8%	19.9%	22.0%	20.3%	2.0%	-8.0%
50-59	13.3%	13.5%	13.9%	15.8%	14.8%	6.6%	-6.8%
60-69	5.4%	5.7%	6.2%	7.3%	7.4%	19.5%	1.3%
70+	1.3%	1.5%	1.7%	2.0%	2.4%	38.4%	18.9%
N/A	2.7%	1.7%	1.7%	2.1%	3.6%	119.2%	41.2%

Unlike males, younger runners have not returned to their 2019 participation rates. Participation under 18 did bounce back in 2021, likely in part because cross country returned in much of the country; however, the 18-29 age group fell from 16.4% in 2019 to 12.8% in 2021.

12.8% of 2021 Participants Aged 18-29
**16.4%** of 2019 Participants Aged 18-29

Age by Event Type

Age	2019 In-Person	2019 Virtual	2020 In-Person	2020 Virtual	2020 Virtual Challenge	2021 In-Person	2021 Virtual	2021 Virtual Challenge
Under 18	17.9%	7.7%	18.3%	11.5%	8.0%	20.4%	10.5%	8.2%
18-29	16.4%	11.9%	13.5%	8.0%	11.9%	13.2%	11.6%	9.5%
30-39	22.4%	24.5%	21.9%	20.4%	23.7%	20.0%	21.9%	20.4%
40-49	19.9%	25.5%	21.1%	10.5%	25.6%	19.5%	23.4%	24.8%
50-59	13.9%	18.2%	15.0%	8.2%	18.0%	14.1%	17.3%	19.2%
60-69	6.2%	7.6%	6.7%	13.2%	8.2%	7.0%	8.7%	9.6%
70+	1.7%	2.2%	1.7%	11.9%	2.0%	2.3%	3.0%	2.7%
N/A	1.7%	2.4%	1.7%	13.2%	2.5%	3.5%	3.7%	5.6%

The participation of various age groups is clearly impacted by event type. Younger participants (under 30) are significantly more likely to choose an in-person event, while older participants (40+) make up a larger proportion of participants in virtual events and virtual challenges.

Keep the pandemic in mind when looking at age trends. The greater threat of COVID-19 for older adults may help explain why younger participants were more willing to participate in-person while older participants opt for virtual for safety reasons.

31.5% of Virtual Challenge Participants Were Over 50
53.8% of In-Person Participants Were Under 40

2021 Event Participation by Age

Legend:
- N/A
- 70+
- 60-69
- 50-59
- 40-49
- 30-39
- 18-29
- Under 18
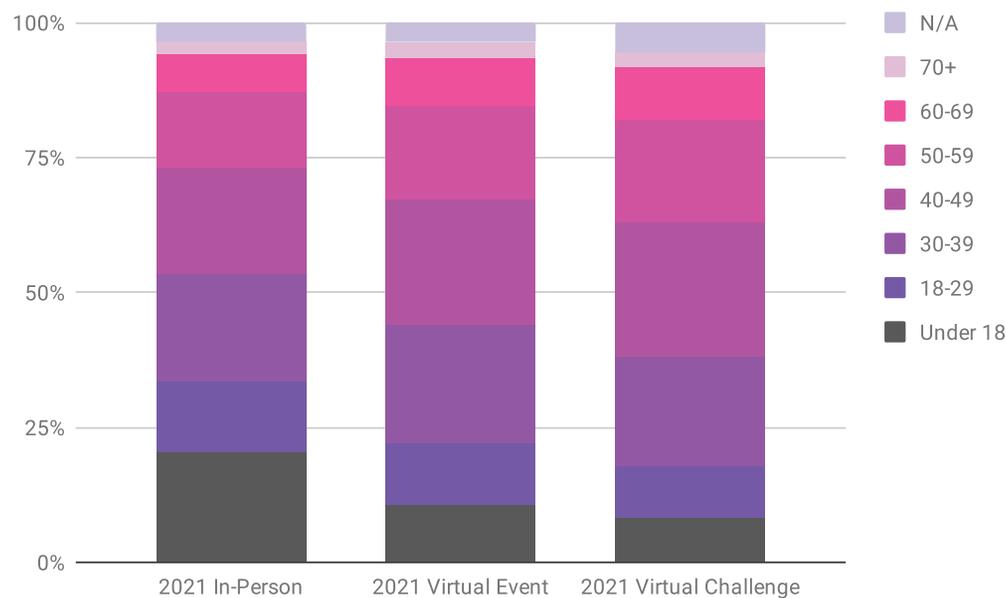
Takeaways

- The majority of participants are still female. Reward them for their support with giveaways tailored for their bodies, awards celebrations that treat genders equally, media coverage for female athletes, and representation in all your promotional materials.

- Older runners continue to opt for virtual options even as younger runners return to in-person racing. Before phasing out virtual options entirely, make sure you have alternatives for older participants who may not feel safe in-person, yet.

- The disappearing trend of younger participants is concerning for the future of the industry. Gen Z and Millennial participants have tremendous social awareness and a love of social activities – bring them back by beefing up your relationship with charity partners and encouraging team participation at your event.

2.3

Event Size by Type

The key takeaway from this section applies to *all* types of events: while media attention focuses on the largest events, the vast majority of endurance events in the US are small, community affairs. Ninety-six percent of in-person events in 2021 had fewer than 500 participants, with 74% registering under 100 participants. The pattern is similar, but even more pronounced, for virtual events, with 97.5% of virtual events and 97% of virtual challenges drawing fewer than 500 participants.

Event Size by Event Type

	2019 In-Person Events	2020 In-Person Events	2021 In-Person Events	2019 Virtual Events	2020 Virtual Events	2021 Virtual Events	2020 Virtual	2021 Virtual
1-100	68.9%	78.5%	74.0%	92.4%	78.3%	83.7%	77.7%	78.9%
101-500	25.4%	18.1%	22.1%	6.5%	18.3%	13.8%	17.9%	18.1%
501-1,000	3.4%	2.1%	2.3%	0.7%	2.2%	1.5%	2.8%	1.7%
1,001-5,000	2.1%	1.2%	1.5%	0.4%	1.1%	1.0%	1.4%	1.1%
5,001-10,000	0.1%	0.0%	0.0%	0.0%	0.1%	0.1%	0.2%	0.1%

96.1% of In-Person Events Had Fewer Than 500 Participants

2021 Size of Event by Type

■ In-Person   ■ Virtual Event   ■ Virtual Challenge
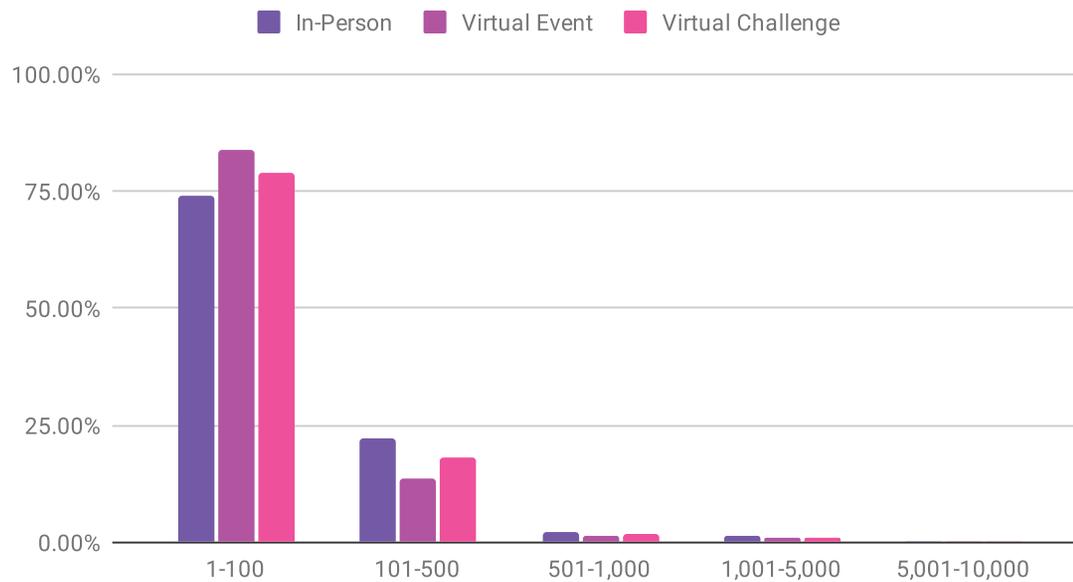
Takeaway

- When making decisions about your event, including how to adapt to events with COVID-19, look to resources designed for events like yours. World Marathon Majors may not be the best example for a 300-person local 5K; instead, seek out guidance from local event directors, online forums, and resources like Race Directors HQ.
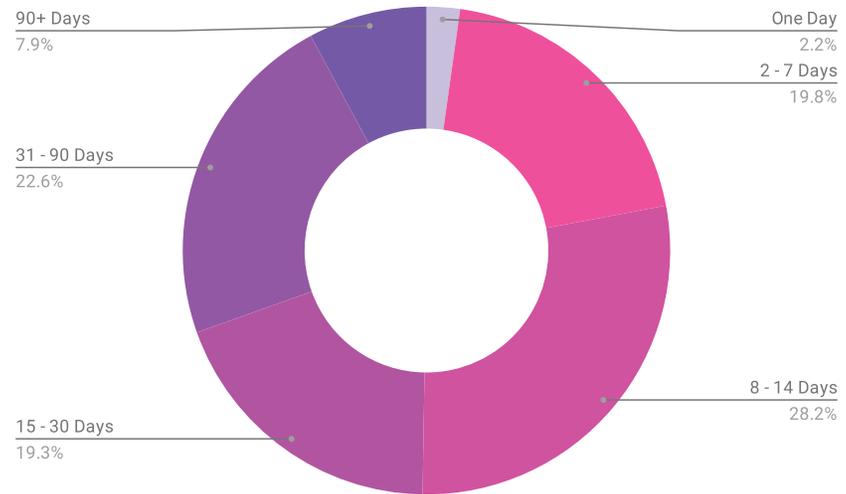
2.4

Length of Virtual Events

The ability to participate over a range of days or weeks is a key feature of virtual events and challenges. Nearly half of all virtual events allow 2-14 days for participants to complete their registered event. Virtual challenges are more likely to last for 1-3 months, with just over half continuing for 31-90 days.

65.7%

of Challenges Are More than 30 Days

Length of a Virtual Race

90+ Days
7.9%

One Day
2.2%

2 - 7 Days
19.8%

8 - 14 Days
28.2%

15 - 30 Days
19.3%

31 - 90 Days
22.6%

Length of a Virtual Challenge

90+ Days
15.3%

One Day
0.5%

2 - 7 Days
7.5%

8 - 14 Days
11.7%

15 - 30 Days
14.6%

31 - 90 Days
50.4%
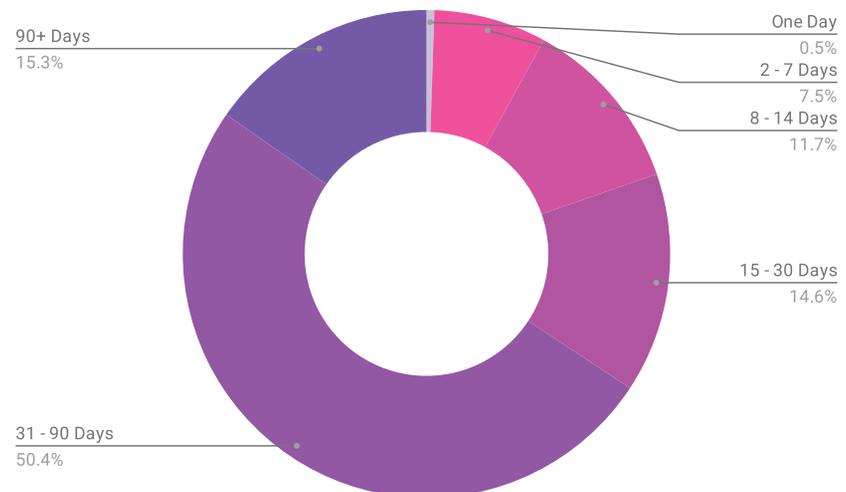
Takeaways

- Flexible scheduling is a major selling point for a virtual event. Even if you offer your virtual event alongside an in-person option, provide virtual participants at least 1-2 weeks to ensure they can accommodate it in their schedule.

- Virtual challenges can be a big commitment for an organization, with long periods of active participation. But that burden can also be a benefit, if you're up for it — engaging consistently with participants over the course of weeks or months is a shortcut to building loyalty.

We are always looking for ways to provide more value to our clients without incurring additional costs. RunSignup allows us to be heroes in delivering effective and efficient online revenue generation solutions that help our nonprofits raise more."

- HANK ZEMOLA, CEO,
Special Events Management, Inc.

03 Registration Trends

Registration Trends

Key Findings and Trends

- Despite reports of widespread procrastination, race week registrations in 2021 were only marginally higher than pre-pandemic, with **25.2% of registrations coming on race week, compared to 24.2% in 2019.** Overall, registration patterns for the year were remarkably normal.

- 2021 shifted closer to pre-pandemic pricing patterns, with the number and range of price increases ticking back up and **5K's ringing in at $27.40 on average – just 2.3% lower than in 2019.**

- Merchandise continues to help close some of the gap from lost registration dollars, with add-ons contributing an **additional $936.99 to events and store items adding $2,098.37** to each event.

- Mobile continues to dominate website views, with phone views holding steady at **69.7% of all event website views.** The big change? Transactions are increasingly from mobile as well, with **58.3% of all transactions coming from a mobile device or tablet**.

Conclusions and Recommendations

- On average, runners are returning to their pre-pandemic registration patterns. Focus your promotional efforts around the same peaks that have traditionally been drivers of action — registration opening, a price increase 1-2 months before race day, and the approach of race week.

- Average prices for events are trending back towards "normal", especially if we exclude virtual events with different pricing considerations. Instead of stressing about the "right" price, focus on ways to use price as an incentive to register via price increases and strike-through pricing.

- Swag can be a big seller. If you have a loyal base or a fun theme, consider premium swag as an add-on or store item to bring in additional revenue. To make the most of your merchandise, make sure you include items that are sized for women — the majority of event participants.

- Stop thinking of mobile as secondary. If you aren't using a mobile-optimized GiveSignup | RunSignup event website, make sure you test every step of your website on mobile – and minimize additional questions to speed your registration process.

3.1
When Runners Register

Despite the upheaval in 2021, registration patterns looked surprisingly normal compared to pre-pandemic years. As we've seen for each of the last five years, procrastinators who register on race week make up a quarter of all participants. The biggest shift was a reduction in participants registering more than 90 days before an event— not surprising, since many events opened registration later than normal and a number of participants waited for indications that an event would be able to proceed before signing up. As a result, a record percentage of registrations came between 15-60 days before the event.

25.2%
of 2021 Registrations Were on Event Week

When Runners Register

When Runners Register	2017	2018	2019	2020	2021	Change 2019-2021	Change 2020-2021
Race Week	25.0%	24.3%	24.2%	26.1%	25.2%	4.4%	-3.5%
8-14 Days	13.4%	13.1%	12.5%	12.9%	13.3%	6.1%	3.3%
15-30 Days	20.7%	20.7%	20.6%	20.0%	22.0%	7.2%	10.3%
31-60 Days	18.1%	18.9%	19.1%	17.0%	19.3%	1.2%	13.4%
61-90 Days	8.8%	9.1%	9.0%	7.7%	8.2%	-9.0%	6.1%
91-120 Days	5.8%	5.6%	5.6%	3.9%	4.2%	-24.7%	10.1%
120+ Days	8.3%	8.3%	9.0%	12.4%	7.7%	-14.7%	-38.0%
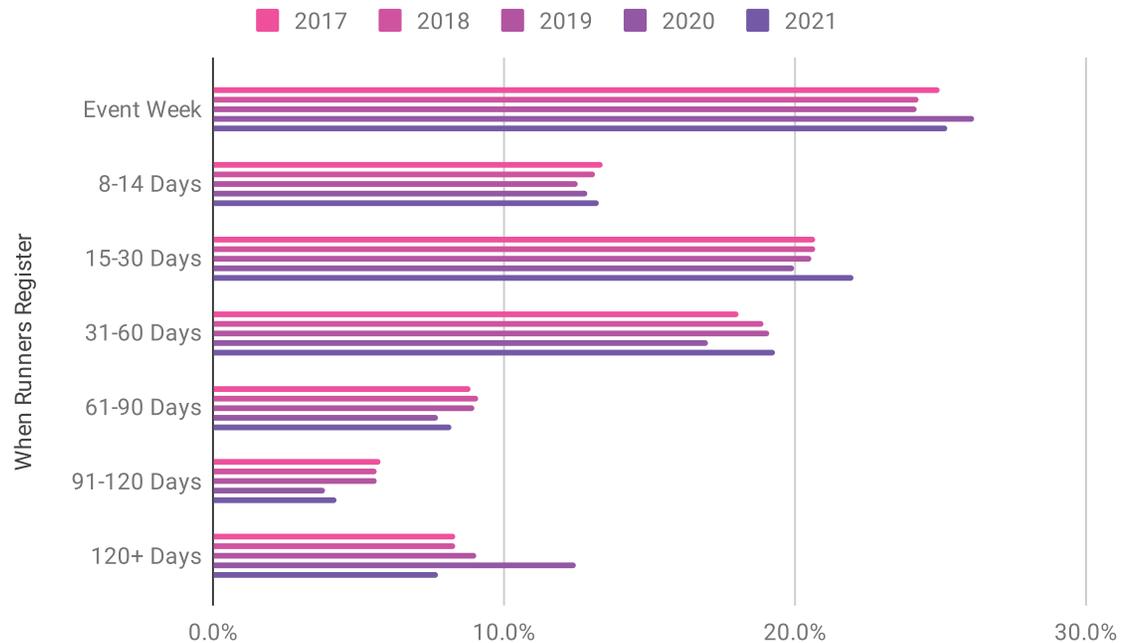
When Runners Registered in 2021	5K	10K	Half Marathon	Marathon	Triathlon
Event Week	26.6%	20.3%	10.0%	11.1%	14.6%
8-14 Days	14.9%	11.4%	6.1%	6.0%	9.2%
15-30 Days	24.8%	18.1%	12.5%	11.5%	16.0%
31-60 Days	20.1%	21.7%	19.0%	18.1%	21.9%
61-90 Days	7.0%	10.5%	14.4%	10.1%	14.0%
91-120 Days	2.6%	8.5%	11.6%	9.1%	9.3%
120+ Days	4.0%	9.7%	26.3%	34.1%	15.0%

When Runners Register by Distance

Similarly, the registration curve by event distance closely resembles previous years with early interest, a mid-cycle hump, and then a drop before the race week scramble. In general, longer distances with longer training cycles see more registrations early, while shorter distances are most likely to get a boost in the final week.

Note: Some of the very early registrations may be artificially inflated by events that opened registration, then delayed to a later date. However, we don't believe this was enough to impact the overall trends.

When Runners Register

86.4% of 5K Runners Registered Within the Last 60 Days
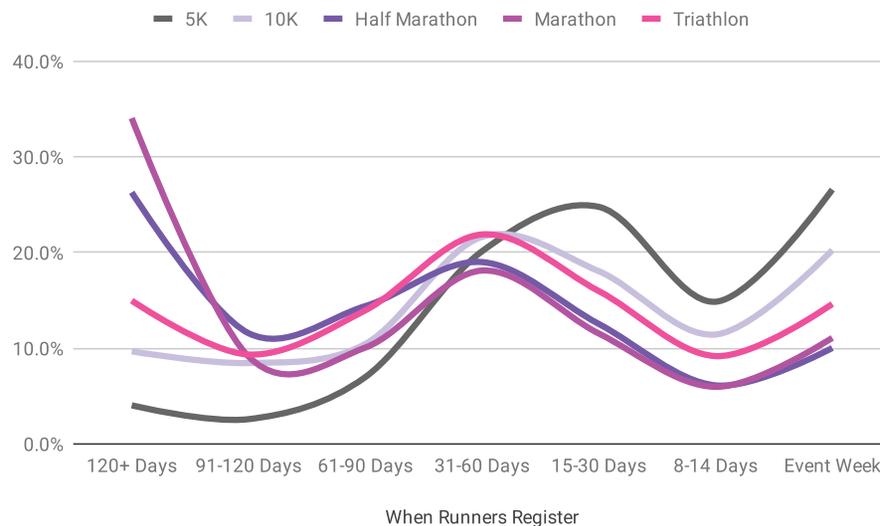
Takeaways

- Runners haven't changed that much in the last two years. Continue to focus your promotions at times you have traditionally found success – registration opening, a price increase 1-2 months before race day, and on race week.

- Participants in shorter distances, especially 5K's, are the least likely to register early. Implement a few cost-saving strategies to reduce guessing, including dynamic bib assignment (no wasted chips!), inventory management (no over-ordering of small t-shirts), and strong price incentives for registering before your ordering deadline.

3.2
Registration Times

The internet – and online registration – is always open. While traffic is minimal between midnight and 6 am, participants are online and willing to sign up throughout the day and into the evening.

Takeaway

- There does not appear to be a "perfect" time for online event promotions, with registrations scattered throughout the day. However, with 57.5% of participants registering between the working hours of 9 am – 6 pm, it can be prudent to reach out to potential participants while you know they are more likely to be in front of a computer.

What Time do Participants Register?

Sign Up Hours	2017	2018	2019	2020	2021
Midnight - 6 AM	2.0%	2.0%	2.0%	2.8%	2.4%
6 AM - 9 AM	9.7%	9.8%	10.2%	10.0%	10.3%
9AM - Noon	20.5%	20.9%	20.9%	21.1%	21.4%
Noon - 3 PM	18.6%	19.0%	18.9%	19.4%	19.1%
3 PM - 6 PM	16.5%	16.5%	16.6%	17.3%	17.0%
6 PM - 9 PM	17.6%	17.5%	17.9%	17.9%	18.0%
9 PM - Midnight	15.0%	14.2%	13.6%	11.6%	11.8%

The only clear movement over the last three years has been a reduction in the number of people registering for events in the late evening, between 9:00 pm and midnight.
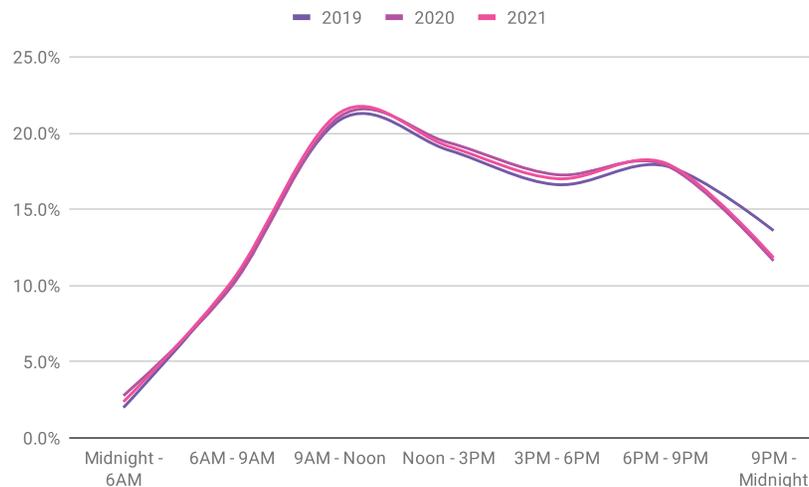
58% of Registrations Were Between 9:00 am-6:00 pm

3.3
Pricing Trends

Average Price

Event prices in 2021 increased compared to 2020 for all race distances besides ultramarathons. However, for most distances prices are still lower in 2021 than they were in 2019, with the longest distances showing the largest change in prices since pre-pandemic racing.

The growth of virtual events, where the overhead is often lower and less tied to the distance of the event, is still the likely culprit for the lower prices overall, especially for long distance events. However, the increases compared to 2020 suggest that events are gradually trending back to their pre-COVID pricing schedules.

Price by Event Distance

Event Distance	2017 Average Price	2018 Average Price	2019 Average Price	2020 Average Price	2021 Average Price	Change 2020-2021	Change 2019-2021
1 mile	$17.01	$17.48	$17.99	$17.73	$19.60	10.5%	8.9%
5K	$26.06	$26.40	$28.05	$26.39	$27.40	3.8%	-2.3%
10K	$33.01	$34.63	$35.97	$31.27	$34.55	10.5%	-3.9%
Half Marathon	$64.14	$66.33	$63.09	$53.13	$58.38	9.9%	-7.5%
Marathon	$92.48	$90.75	$89.53	$72.25	$74.47	3.1%	-16.8%
Ultra	$113.59	$108.38	$110.99	$72.64	$70.98	-2.3%	-36.0%
Triathlon	$89.75	$91.26	$90.50	$88.41	$97.15	9.9%	7.3%

Note: Long-distance challenges end up being categorized as ultra-distance events, likely causing the significant downturn in average prices for Ultramarathons the last two years.

5K Prices in 2021 Were Down Just 2.3% Compared to 2019

Number of Price Increases

It wasn't just average prices that were below 2019 thresholds. The number of price increases per event also stayed low as uncertainty about event dates and the continued inclusion of virtual events contributed to simpler pricing setups. However, increased stability and attempts to ramp participation numbers back up did lead to more price increases in 2021 than in 2020.

Event Distance	2017 # of Price Increases	2018 # of Price Increases	2019 # of Price Increases	2020# of Price Increases	2021 # of Price Increases	Change 2020-2021	Change 2019-2021
1 mile	0.5	0.5	0.6	0.4	0.5	25.0%	-16.7%
5K	0.8	0.8	1	0.7	0.7	0.0%	-30.0%
10K	1.2	1.3	1.4	0.9	1.0	11.1%	-28.6%
Half Marathon	2.0	2	2.1	1.2	1.4	16.7%	-33.3%
Marathon	1.9	2.2	2.2	1.2	1.3	8.3%	-40.9%
Ultra	1.6	1.6	1.5	0.7	0.8	14.3%	-46.7%
Triathlon	1.9	2	2.2	1.5	2.0	33.3%	-9.1%

Difference Between Minimum and Maximum Prices

In addition to lower overall pricing and fewer price increases, the difference between the lowest and highest prices for each distance continues to be less than it was in 2019. This is particularly true for longer events like marathons and ultramarathons, where virtual events and shortened registration periods have had the largest impact.

$10.73 Separated the Low and High Price for a 10K in 2021

Event Distance	2017 Difference	2018 Difference	2019 Difference	2020 Difference	2021 Difference	Change 2020-2021	Change 2019-2021
1 mile	$6.35	$6.44	$6.65	$7.17	$7.27	1.39%	9.3%
5K	$8.20	$8.36	$10.38	$10.85	$8.94	-17.60%	-13.9%
10K	$9.56	$10.39	$11.53	$10.90	$10.73	-1.56%	-6.9%
Half Marathon	$22.88	$23.79	$24.25	$20.90	$20.29	-2.92%	-16.3%
Marathon	$30.50	$36.00	$36.49	$28.30	$28.77	1.66%	-21.2%
Ultra	$32.37	$39.94	$39.33	$27.48	$28.63	4.18%	-27.2%
Triathlon	$27.38	$29.83	$28.35	$27.90	$29.90	7.17%	5.5%

Takeaways

- Prices will likely continue to trend upwards in 2022 as in-person events come back full-force and supply chain issues force cost increases. Stay focused on what the cost of your event *needs* to be to cover your expenses (including required profit) rather than trying to match 2020 prices that don't reflect the current climate in the industry.

- 2022 is the year to get back to a pre-planned schedule for pricing. Outline your planned price increases in advance, and share them widely. A clearly articulated pricing scheme can help you reach both bargain hunters and procrastinators – but they have to know when it's time for them to buy.

- Want to give your price increases an extra punch? Use strike-through pricing to demonstrate the deal that registrants are getting and remind them that they will save if they register *now*.

3.4
Pricing Strategies

Time-based calls to action are a reliable method for prompting potential registrants to commit. Twenty percent of participants registered within 3 days of a price increase or registration in 2021, fewer than the 27% who registered during that period in 2019. However, time-based calls-to-action showed more impact in 2021 than 2020.

Worth noting: the number of price increases also remained lower in 2021 than in pre-pandemic years, meaning there were fewer opportunities for time-based calls to action to contribute to this statistic.

20.2%
of All 2021 Registrations Were Within 3 Days of a Price Increase or Registration Close

Registration 3 Days Prior to Price Increase or Registration Close	2017 % of Total	2018 % of Total	2019 % of Total	2020 % of Total	2021 % of Total
Less Than 3 Days	27.8%	27.3%	27.2%	15.8%	20.2%
More Than 3 Days	72.2%	72.7%	72.8%	84.2%	79.8%

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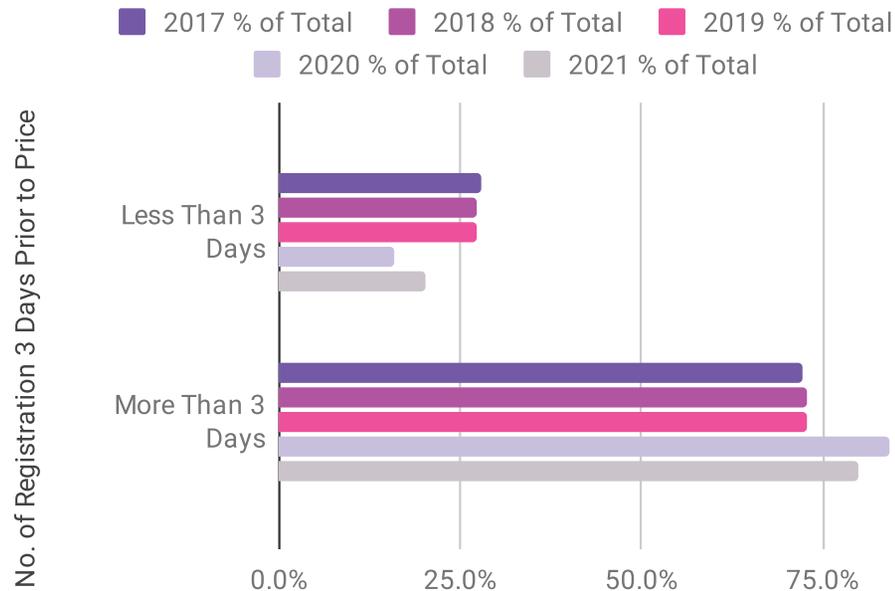
Takeaway

- Pricing is a tried and true marketing strategy. While the pandemic has made registration patterns less predictable, deadlines still drove one-fifth of all registrations. Continue to communicate deadlines and price increases to strengthen your calls-to-action.
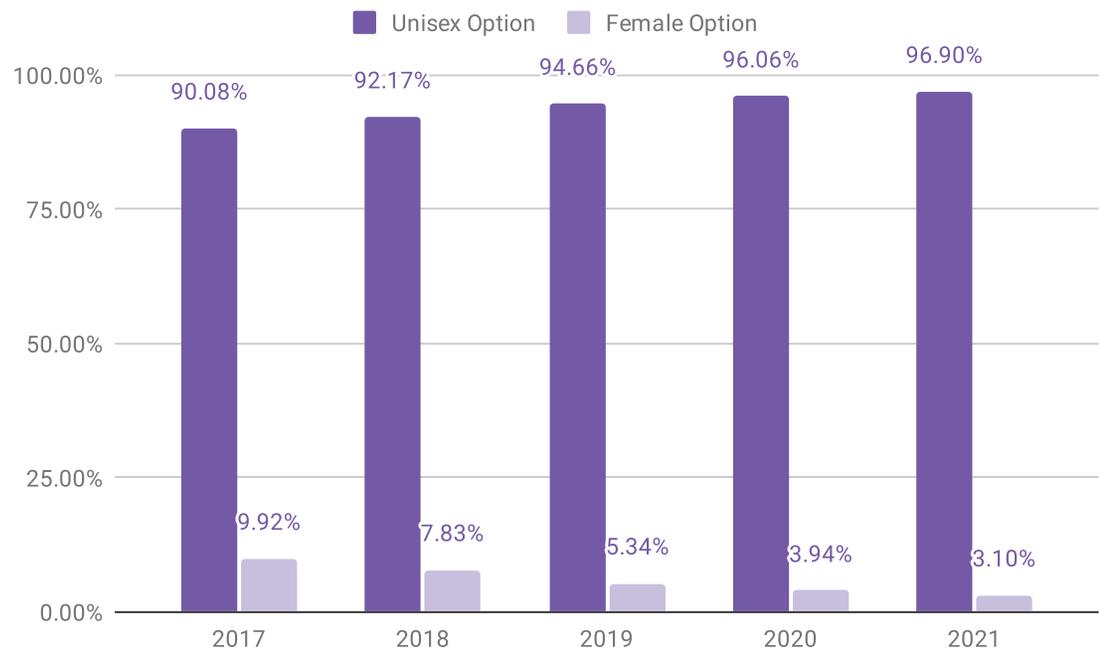
3.5
Giveaways

While female athletes continue to out-pace male athletes in registrations, shirts are increasingly offered only in unisex sizing, with only 3.1% of races offering a female-specific shirt size. Supply chain issues and event uncertainty may be contributing to the focus on offering one simple option for giveaways.

3.1%

of Events Offered a Female Giveaway Size

Giveaways Offered

Legend: Unisex Option, Female Option

| Year	Unisex Option	Female Option
2017	90.08%	9.92%
2018	92.17%	7.83%
2019	94.66%	5.34%
2020	96.06%	3.94%
2021	96.90%	3.10%

Average shirt sizes have gotten larger over the last few years, with the trend accelerating in 2020. In 2021, we saw a bit of normalization, with shirt sizes more in line with those in 2019.

Unisex Size Breakdown

Legend: 2017, 2018, 2019, 2020, 2021
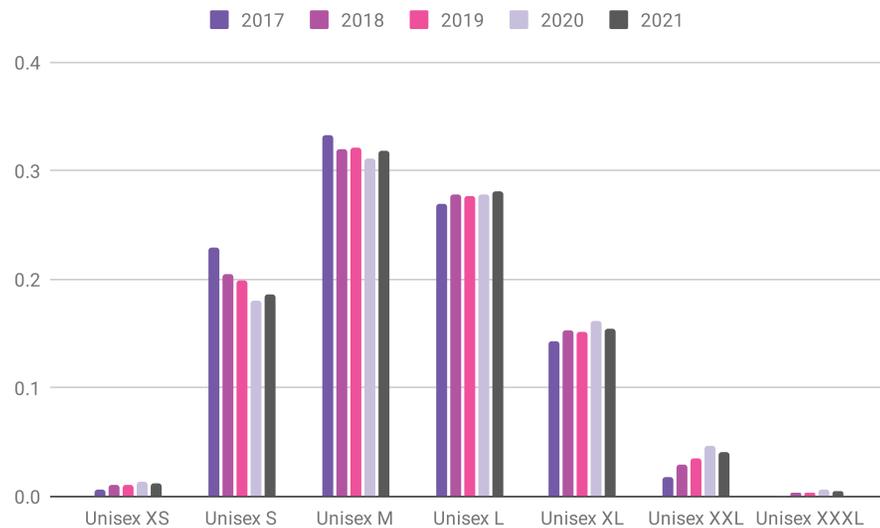
When female shirt sizes are offered, smaller options are popular. 29.7% of female shirts were Smalls or X-Smalls, sizes that often do not have comparable options in unisex sizes.

Female Shirt Breakdown 2021

Female XXL 3.4%
Female XL 10.0%
Female L 21.1%
Female M 35.6%
Female XS 4.9%
Female S 24.8%
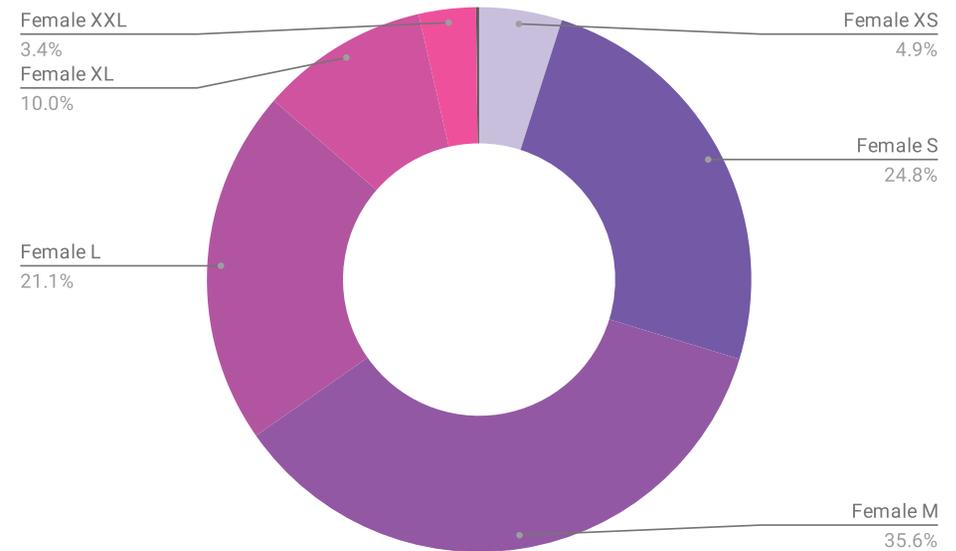
31.9% of Unisex Shirts Were Mediums

Takeaways

- Swag can be a significant driver of registrations, particularly for virtual and themed events, where female participation exceeds male participation. Offer high quality swag in gender-specific sizing — the higher price is worth it to attract more participants to your event.

- Volatile supply chains and registration patterns made swag numbers and sizing difficult to estimate this year. Order early and use inventory management tools to ensure participant orders don't exceed available swag.

3.6
Merchandise

Swag can also be an alternative stream of revenue for savvy events who offer merchandise via add-on or store items. The *percent* of event revenue from swag decreased slightly in 2021 because registration revenue grew, but on average, add-ons and store items provided more revenue dollars than ever to events that offered them.

Takeaways

- Brand your event. Whether you highlight the cause you support, focus on the historical nature of the event, or lean into your creative theme, a consistent and desirable brand is the first step to increasing revenue through merchandise.

- Add-ons are offered only to event participants, while store items can be bought anytime, by anyone. If your event has a marquee name and premium swag, consider a store with commemorative items that will appeal to spectators as well as participants.

Purchases with Add-Ons

Purchases with Add-Ons	2018	2019	2020	2021
Percent of Registrations with Add-Ons	17.9%	15.8%	22.3%	16.8%
Percent of Revenue with Add-Ons	2.8%	3.2%	5.0%	4.0%
Average Amount Paid for Add-Ons	$6.48	$8.21	$7.91	$10.31
Average Event Revenue from Add-Ons	$1,066.43	$1,236.81	$837.38	$936.99

While add-ons tend to be lower-cost items or upgrades (like a tech shirt instead of a cotton one), store is more often used for premium swag. This is reflected in the average amount paid for each, with $10.31 average for add-ons, and $32.76 paid for store items.

Purchases with Store Items:

Purchases with Store Items	2018	2019	2020	2021
Percent of Registrations with Store Items	1.4%	1.2%	2.2%	2.0%
Percent of Revenue with Store Items	1.0%	0.9%	1.8%	1.5%
Average Amount Paid for Store Items	$30.73	$29.48	$27.72	$32.76
Average Event Revenue from Store Items	$1,140.49	$1,152.14	$1,222.28	$2,098.37

**$2,098.37 Average Event Revenue** from Store Items

3.7
Mobile Adoption

For the first time since we began reporting on trends, the percent of website views on mobile devices held steady rather than rising. Mobile still dominates, though, with nearly 70% of all page views coming from mobile devices.

71.8%

Traffic is From Mobile or Tablet Users
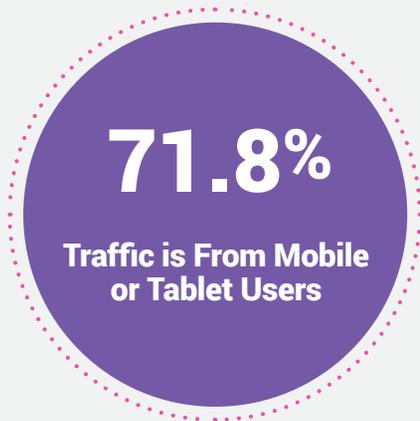
Website Views by Device Type

| Website Views	Sept. 2017	Sept. 2018	Sept. 2019	Sept. 2020	Sept. 2021
Mobile	55.8%	60.5%	65.6%	69.7%	69.7%
Tablet	6.2%	5.5%	4.7%	3.2%	2.1%
Desktop	38.0%	34%	29.6%	27.1%	28.3%
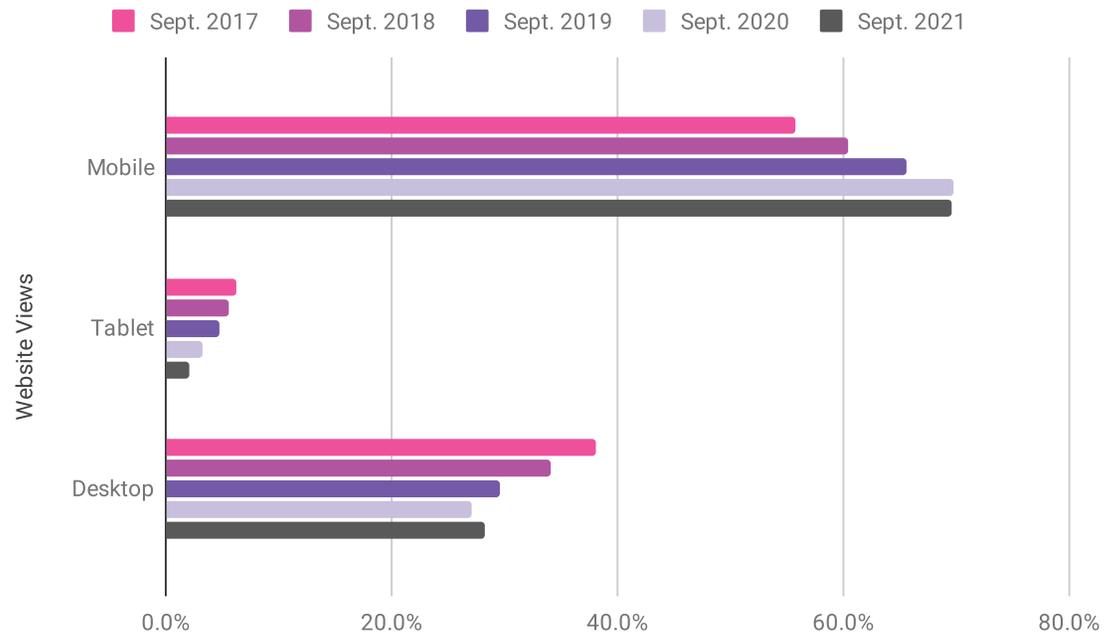
The percent of transactions made on mobile devices continued to rise, with a full 56.8% of transactions taking place on phones. Improved user experiences for mobile users and the increasing regularity of making purchases via mobile phone continues to move transactions away from desktop devices.

Transactions by Device Type

| Transactions	Sept. 2017	Sept. 2018	Sept. 2019	Sept. 2020	Sept. 2021
Mobile	33.5%	38.1%	44.4%	52.3%	56.8%
Tablet	6.5%	6.1%	2.4%	2.8%	1.5%
Desktop	60.0%	55.8%	53.2%	45.0%	41.7%

58.3% Transactions Take Place on a Mobile Device or Tablet
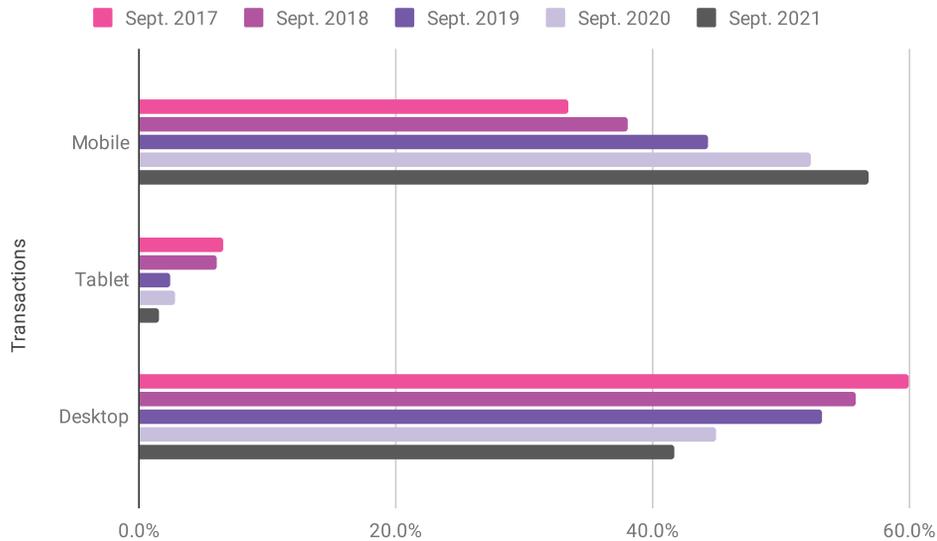
Apple continues to lead the mobile market, making up 75% of mobile devices accessing RunSignup in 2021. Android's market share has held constant over the last few years, retaining 23-26% every year since 2017.

Device Type

Device Type	Sept. 2017	Sept. 2018	Sept. 2019	Sept. 2020	Sept. 2021
Apple	74.0%	74.0%	76.4%	76.3%	75.3%
Android	26.0%	26.0%	23.1%	23.4%	24.7%

■ Sept. 2017 ■ Sept. 2018 ■ Sept. 2019 ■ Sept. 2020 ■ Sept. 2021

Android
24.7%

Apple
75.3%
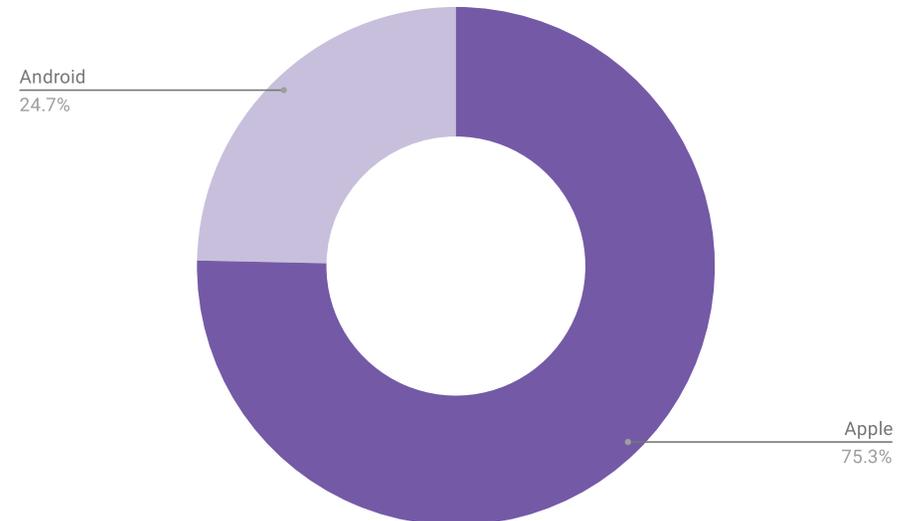
Takeaways

- Mobile is first. RunSignup websites and emails are designed to be mobile-friendly, but no matter what technology you use, every website, email, and registration process should be tested on a mobile device.

- People aren't just researching events on their phones anymore – they're registering on their phones too. Limit registration fields and questions to prevent incomplete registrations on mobile devices.

- For the fifth year in a row, Android users have made up approximately a quarter of all event website visitors. Make sure your team has access to both types of devices to test your website and registration.

Think outside of the box. Think of ways to engage participants. Keep them engaged and have them feel a part of something versus an ambiguous virtual event. People really don't understand what this means. Give them something to do that is creative. More importantly, if you can offer a cause for them to rally behind versus just a fun experience, events will have much higher engagement and success like with Steps for Students."

- SURAIYA CULP
The Devil's in the Details Events

04 Promotion Trends

Promotion
Trends

Key Findings and Trends

- Referral rewards continue to be a significant driver of event registrations, with **8% of transaction dollars coming from referrals** when they are enabled.

- The simple act of offering social teams can both boost registrations and make your event day more fun and engaging. In 2021, **29.8% of registrants joined a team when the option was available.**

- Usage of the free RunSignup email marketing platform continues to rise, with **341.7 million emails sent in 2021.** The result of those emails? RaceInsights estimates that **7.7% of registrations came from the integrated email marketing system.**

- A strong search engine presence is key, with Google estimating that **organic search led to 29.6% of page views and RaceInsights attributing 17.1% of registrations to Google search.**

Conclusions and Recommendations

- Social connections continue to bring in registrations and enhance events. Encourage participants to bring their friends and family through premium incentives for referrals and recognition of your key referrers.

- Use teams to grow your event and make event day more engaging. Consider t-shirt contests, photo competitions, and team spirit awards to keep energy high throughout your event.

- Email marketing allows you to reach a wide audience of past and current participants, but traditional platforms can be costly. Cut your costs with a free email marketing platform, and save time with set it and forget it automated emails.

- Your website is a crucial marketing tool. RunSignup's free event websites allow you to build a professional, multi-faceted website in minutes, with built-in SEO to ensure potential participants can find you.

4.1
Coupons

Coupon usage remained low in 2021, with just 5.8% of transactions using a coupon code (compared to 8% in 2019). This, along with the decreased frequency of price increases, is likely the result of the disruptions to normal pricing patterns and marketing strategies.

Takeaways

- Coupon usage grew slightly in 2021, and we expect to see that continue in 2022 as events reintroduce their traditional strategies for pricing and marketing. Plan ahead and be intentional about when and why you offer coupons.

- Discounts don't need to be huge to motivate action – the average discount over the last few years has ranged between $10 to $15. Don't undervalue your event with excessively large coupon amounts.

Coupon Usage and ROI

Coupons	% of Registrations Using Coupons	ROI	Average Discount	Total Discounts	Net Revenue From Coupons
2017	7.8%	340.0%	$15.69	$3,684,319	$12,526,890
2018	7.5%	369.0%	$10.92	$3,559,383	$13,132,704
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

$12.75 Average Discount for a Coupon

Coupon ROI
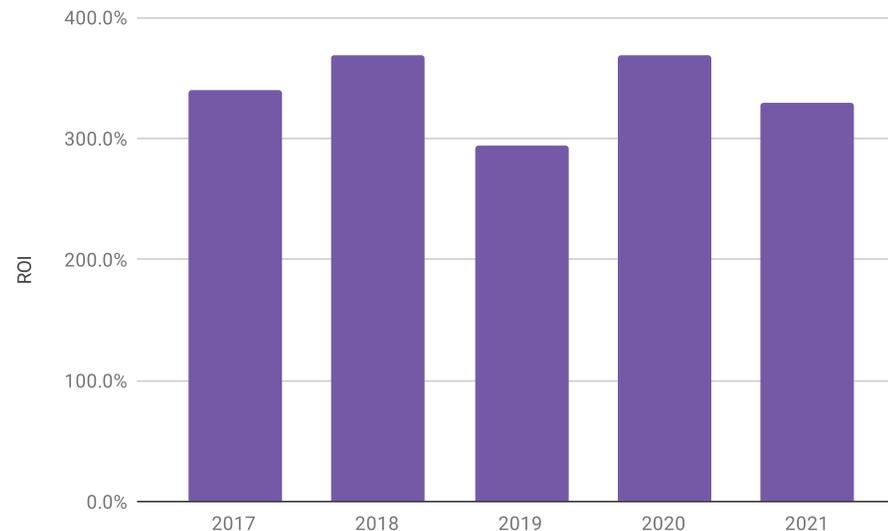
4.2
Referral Rewards

Referral rewards had a massive year in 2020, with the surge of online activity and virtual events leading to a whopping 17% of transactions coming from referrals. In 2021, as events returned to in-person options, the effectiveness of referrals dropped closer to pre-pandemic levels.

When Enabled, 8% of Registration Dollars Are From Referrals

Regardless of the decline compared to 2020, referrals remain one of the most effective ways to recruit participants and engage your existing supporters as ambassadors, with 8% of transactions continuing to come from referrals and an impressive CPA of $1.40.

$1.40 Cost Per Acquisition for Each New Registration via Referral Reward Refunds

## Percent of Registrations and Transactions From Referral Rewards

	2017	2018	2019	2020	2021
# Total Registrations	6%	6%	6%	13%	7%
# Total Transactions	6%	6%	7%	17%	8%

Referral Rewards Results

	2019	2020	2021	Change 2019-2021	Change 2020-2021
No. Referral Codes	304,559	436,761	482,857	58.5%	10.6%
No. Event Page Views	2,074,611	12,853,014	6,283,731	202.9%	-51.1%
No. Sign Up Page Views	274,629	646,415	335,613	22.2%	-48.1%
No. Completed Registration Transactions	104,639	232,034	141,411	35.1%	-39.1%
No. Completed Registrations	129,485	269,548	165,991	28.2%	-38.4%
Completed Registration Amounts	$6,314,452.28	$12,123,526.60	$8,322,654.42	31.8%	-31.4%
No. Referral Refunds	10,131	21,937	20,601	103.3%	-6.1%
Estimated Referral Refund Amounts	$132,523.64	$233,854.27	$231,603.46	74.8%	-1.0%
Estimated ROI	4665%	5084%	3493%	-25.1%	-31.3%
Estimated CPA	$1.02	$0.87	$1.40	37.3%	60.9%

Why are referrals so cost effective? When you set your thresholds high (but attainable), many participants will refer a friend or two but fall short on the number of referrals needed to receive a refund, saving you money in the long run.

Value of Registrations vs. Cost of Refund Rewards
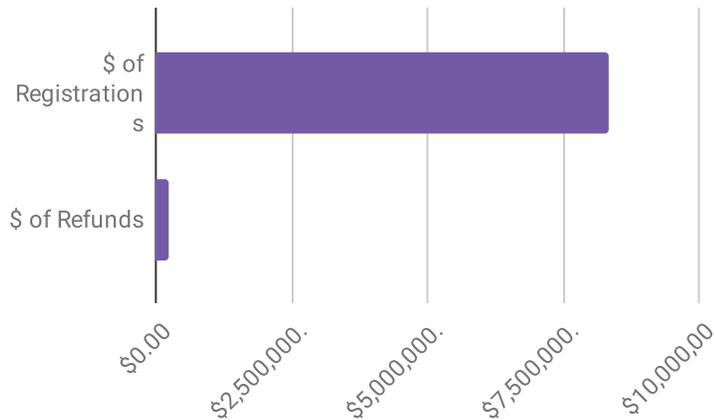
Referral Rewards Results
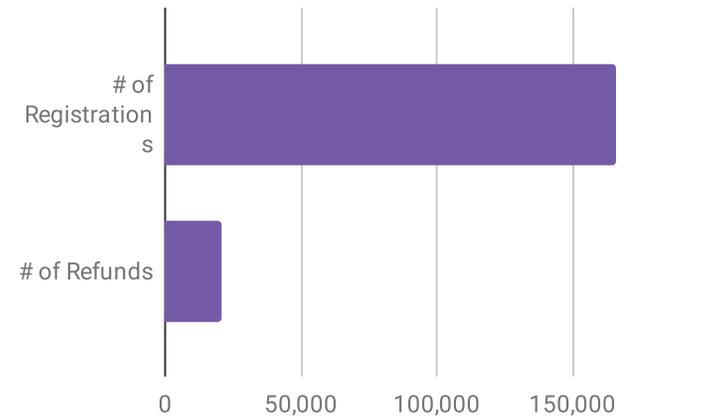
Takeaways

- Referrals work because people trust recommendations from family and friends, and even as online engagement drops back to pre-pandemic levels, referral rewards remain one of the most effective ways to spread the word. Set up registration follow-up emails to remind your participants of the rewards offered for referring to your event.

- Cultivate super supporters with stacked rewards programs that offer different rewards for different thresholds. For example, offer a $15 refund for five referrals, a limited-run hat for 10 referrals, and a premium jacket for 15 referrals. Most participants won't achieve 15 referrals (or even five), but a few motivated people will — and recognizing them will ensure they continue to be ambassadors for your event for years to come.

4.3
Groups/ Teams

Group/team participation has remained steady over the last five years, with 29% of participants opting to join a group this year (when offered). As hybrid and virtual events have become more common, social teams are a good way to encourage friends and family to participate "together" from anywhere.

29.8% of Participants Joined a Team When Offered

Group Participation and Size

Year	% Participants in Groups	Average Group Size
2017	30.6%	6.0
2018	28.9%	6.4
2019	29.4%	6.4
2020	31.4%	6.6
2021	29.8%	6.8

The average size of each team has crept up gradually, with 6.8 participants per team in 2021. Some events encourage larger groups by providing incentives based on the size of the team. Incentives can be financial, in the form of automated refunds, or they can be premium swag or on-site perks, like a team tent.

Takeaways

- The best marketer for your event is a participant who loves the event. Encourage participants to recruit their friends and family by highlighting and promoting your team option.

- Provide incentives for groups/teams that reach a predetermined size threshold. Larger teams make for a more social and interactive race day and ensure a positive experience for your participants.

- Unless you have competitively scored teams, always allow participants of different events/distances (including virtual and in-person options) to join the same team. An inclusive team option drives multi-generational participation and rewards participation by beginners.

4.4

Email Marketing

RunSignup's integrated email marketing platform gives event organizers a free and easy way to reach their supporters, including current and former participants, volunteers, fundraisers, donors, and custom lists of contacts. Over the last four years, usage of the email marketing platform has more than doubled, from 131 million emails sent in 2018 to nearly 342 million emails sent in 2021.

While some of this growth is tied to an increase in the number of events on the RunSignup platform, it also represents a growing number of events looking to save money on email costs and keep their communications within their event platform. With a second generation email marketing platform rolling out in 2022, including more flexible email templates, we expect to see reliance on email marketing continue to rise.

341.7 Million Free Emails Were Sent by Event Organizers in 2021

Total Emails Sent via Email Marketing (in Millions)

Month
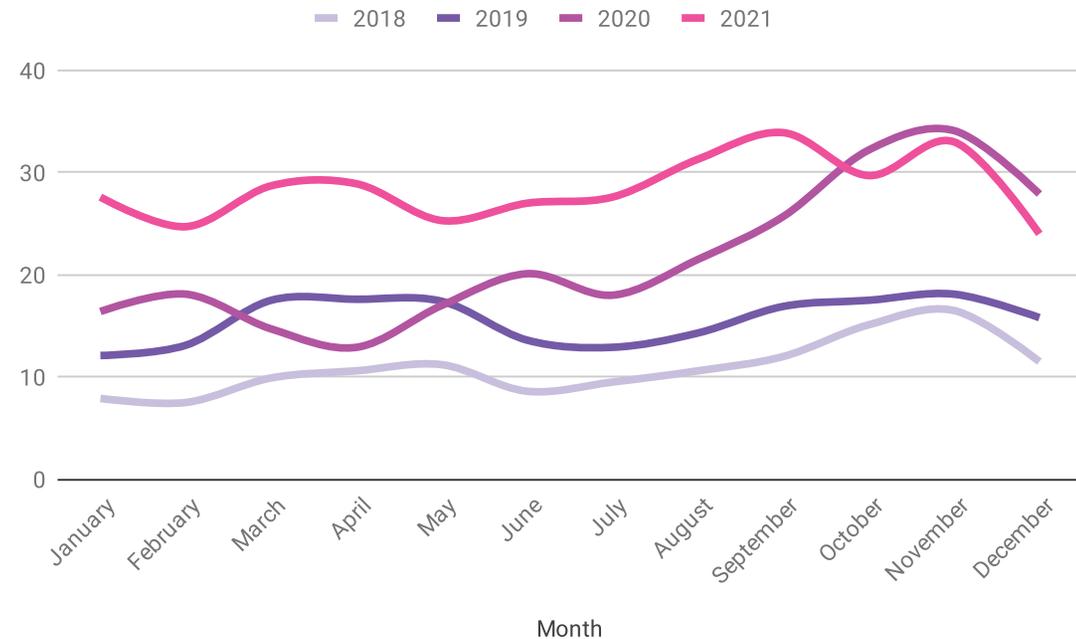
While event organizers can prepare and send emails at any time, automated emails built into the platform simplify the process by allowing modifications to certain pre-defined emails. Automated emails include:

- **Incomplete registration emails** to prompt a supporter who begins but does not complete the registration process

- **Price increase emails** to send reminders of upcoming price increases to current and previous participants

- **RaceJoy emails** to educate participants on best practices for using the runner tracking app

- **Registration follow-up emails** to provide key updates to participant *after* they register, such as sending reminders to refer the event or recruit team members

2018 **2019** **2020** **2021**
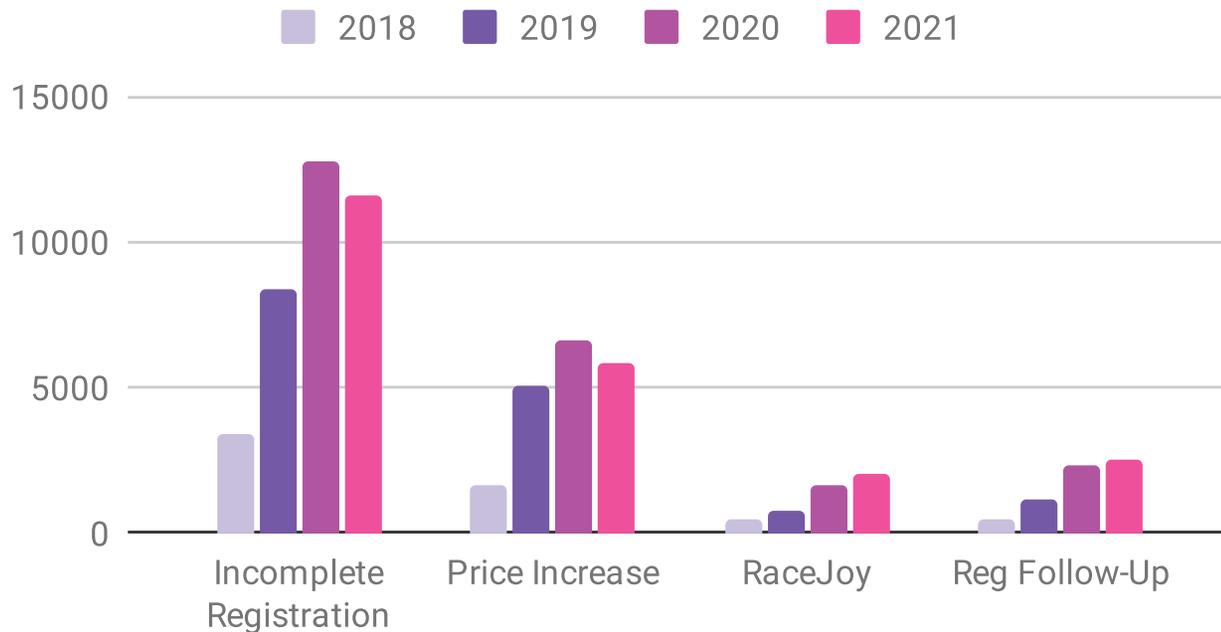
# of Races with Automated Emails Enabled

Events with Automated Emails Enabled

Events are most likely to enable automated emails for incomplete registrations, but the strong call to action included in price increase emails are more likely to drive registrations.

Takeaways

- Don't leave money on the table: Automated emails can save you time and reduce stress, but more importantly, they can help you capture more registrations by ensuring you get your emails out at the optimal time to drive action.

- Email marketing is a powerful communication tool for events, both for marketing and critical communications about event day. Take advantage of free email marketing and stop making decisions about who and when you should email based on email list caps and tiered pricing programs.

- Signups from registration follow-up emails can't be quantified from this data, but they are crucial to support your other marketing efforts. Use your registration follow-up emails to encourage participants to refer their friends, remind supporters of fundraising incentives, and drive participants to recruit people to join their team.

4.5

Google Analytics

The information in this section is from our Google Analytics data for September 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.

29.6% Website Traffic From Organic Search
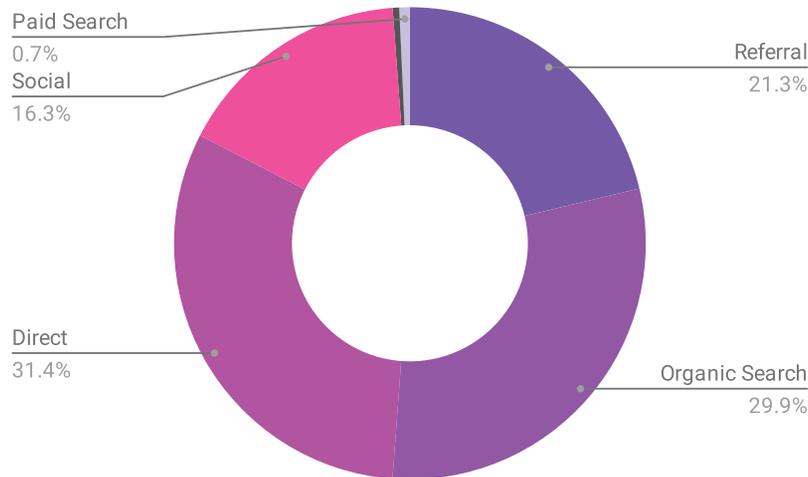
21% Website Traffic From Referral Sources

16.1% Website Traffic From Social Sources

Traffic Volume Represented

	Sept 2017	Sept 2018	Sept 2019	Sept 2020	Sept 2021
Sessions	3,421,377	4,636,812	6,238,604	7,168,916	8,689,521
Transactions	$13,253,653	$17,848,933	$23,070,205.85	$19,119,072	$31,723,172

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 7.7% 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.

Sources of Website Views

Paid Search 0.7%
Social 16.3%
Referral 21.3%
Direct 31.4%
Organic Search 29.9%

Organic search rebounded as a source of website traffic in 2021, as experienced participants began to seek out new events again. Along with that, social sources fell to 16.1% in 2021, bringing referrals from social more in line with what we saw in 2019.

Traffic Sources

Source	Sept 2017	Sept 2018	Sept 2019	Sept 2020	Sept 2021
Referral	42.3%	35.8%	26.9%	19.4%	21.0%
Organic Search	24.4%	28.3%	29.8%	17.1%	29.6%
Direct	17.6%	20.0%	24.6%	35.5%	31.0%
Social	14.6%	13.8%	16.6%	24.9%	16.1%
Email	0.5%	0.6%	0.7%	1.0%	0.4%
Paid Search	0.1%	0.4%	0.3%	0.5%	0.7%

Referral sources for events are usually race calendars like RunningintheUSA.com, websites for timers or race series', or non RunSignup event websites (like philadelphiamarathon.com). Referrals saw a slight upswing in 2021, although the percentage remained below that of 2019.

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. After a drop in 2020, when fewer participants were looking for

events, Organic Search reclaimed it's position as the second most prominent source of traffic. 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 by the next set of charts.

Google groups all social sources into a single source type, but for events, Facebook makes up 96% of the traffic driven by social media. Instagram has gained importance in the last few years, reaching 2.7% of traffic driven by social sources in 2021, but the emphasis remains on Facebook.

Social Sources

Source	Sept 2017	Sept 2018	Sept 2019	Sept 2020	Sept 2021
Facebook	93.4%	93.7%	95.3%	96.5%	95.5%
Instagram	3.8%	1.8%	2.5%	1.5%	1.7%
Instagram Stories	n/a	2.0%	0.9%	0.5%	1.0%
Twitter	1.7%	1.5%	0.7%	0.8%	0.7%
Other	1.1%	1.0%	0.6%	74.0%	1.1%

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, whereas a last interaction social conversion led directly to the conversion.

While social media drove more conversions in 2021 than 2019, it was not as effective as it had been in 2020.

Social Value

Social Value	Sept 2017	Sept 2018	Sept 2019	Sept 2020	Sept 2021
Contributed Social Conversions	9.0%	8.9%	8.6%	17.7%	10.0%
Last Interaction Social Conversions	4.5%	4.6%	4.4%	9.6%	6.0%

Takeaways

- Google is a primary avenue for finding events, contributing nearly 30% of all website traffic. If you aren't using an SEO-optimized RunSignup event website, test your Google ranking by searching for events in your area and consider a professional SEO audit.

- While social media, particularly Facebook, continues to contribute a significant amount of website traffic, its dominance has decreased as in-person events resumed. Maintain a social media presence, but consider reducing spend on social media advertising if your ROI begins to drop.

- Many large race calendars automatically add events from RunSignup, but 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.

4.6
RaceInsights

RaceInsights, RunSignup's integrated analytics engine, tracks every click, registration, and transaction on each event's website and analyzes the sources to show event directors the true impact of their marketing efforts. Our aggregate data shows that the largest source of registration is people going directly to an event's website, whether that, as an example, is ScottCoffeeRun.com or RunSignup.com/ScottCoffeeRun. Additional sources of registration are shown below.

17.1% of Registrations Came From Google

Source of Registrations

Source	2018	2019	2020	2021
Google	16.8%	18.4%	14.0%	17.1%
Email	6.1%	7.2%	5.3%	7.7%
Facebook	4.8%	4.6%	12.2%	6.1%
RunSignup Affiliates	12.1%	9.7%	7.1%	10.2%
Bing	0.2%	0.2%	0.6%	0.9%
Yahoo	0.2%	0.3%	0.3%	0.4%

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. However, events that use RunSignup's event website as their primary or only website would have accurate search engine attribution.

Facebook drove half as many registrations in 2021, but continued to lead to registrations at a higher rate than 2019. Meanwhile, mirroring the data from Google, RaceInsights showed that Organic Search contributed more registrations in 2021 than in 2020.

Takeaways

• Email marketing drove more registrations in 2021 than any previous year, and since RaceInsights only reports emails sent from the RunSignup platform (with other emails recorded as direct traffic), the true number of registrations from emails likely far exceeds the 7.7% reported. If you're promoting your event on a tight marketing budget, free emails can go a long way toward spreading the word and prompting signups.

• Facebook was responsible for half as many registrations in 2021 than 2020, but the platform still motivated a not insignificant 6.1% of signups this year. Make sure your social sharing images and language are customized to show your event in its best light.

Individual conversations [with participants] are about getting them excited about the event, getting them excited about the cause. And from there, we give them email templates and the tools they need to maximize the donation size. As long as they're excited about it, then, individually, they're going to have some agency, they're going to want to raise money, they're going to feel empowered to raise money, and that's going to increase the donors per participant."

- DAVID GORMLEY
HERO Swim

05 Give Trends

Give
Trends

Key Findings and Trends

- Higher dollar donations (those over $100) increased in 2021, with **4.3% of donations and 37.9% of donation dollars coming from donations of more than $100**. On the flip side, people are most likely to donate a small amount, with **45.3% of donations coming in for less than $10.**

- Adding peer-to-peer fundraising to your event greatly increases your total event revenue. On average, **events with peer-to-peer fundraising raised 630% more than those with simple donations only.**

- A checkbox donation option on the checkout page is a surprisingly effective way to increase donations, i**ncreasing the average amount raised to $4,178, compared to just $1,011 raised when an event only allows donations during registration.**

- Fundraisers that link their RunSignup fundraiser to a Facebook fundraiser via the free integration are much more likely to meet their personal goals and raise more for your organization. In 2021, **61.8% of fundraisers with linked fundraisers met their goal; on average, they raised $1,105.30 each.**

Conclusions and Recommendations

- Provide an opportunity for every potential donor with a range of fundraising levels and meaningful descriptions explaining how donation dollars impact your cause. Once a donation has been captured, take the time to thank your donors (and invite them to future events), no matter how small their contribution.

- Peer-to-peer fundraising is a powerful tool to expand your pool of potential donors. More than that, it's an opportunity to build lasting relationships with your super supporters by creating opportunities for communication.

- For maximum impact, give registrants multiple chances to donate, including during registration and at checkout. Registrants who may rush through registration often decide to give when given a final, simple prompt.

- Every fundraiser wants to feel successful. Providing them with the tools they need to succeed, including guidance on linking their RunSignup fundraiser with a Facebook fundraiser, ensures a positive experience with your organization and makes them more likely to return in the future.

5.1
Donations

We examined both the average number of donations made on our platform and the value of those donations across 2021. Over the last year, total donations on the platform have grown and we have seen a slight upward trend in the amount and value of donations over $25. However, we still continue to see individual donations made across a range of amounts.

68.9% of Donations Were for Less than $25. Making Up 19.3% of Total Donation Dollars in 2021.

People are most likely to donate a small amount (45.3% of donations were less than $10), but all those small donations still added up to 6.4% of the total donation dollars collected. On the flip side, 12.9% of donation dollars came from donations over $500, despite a mere 0.4% of all donations being made in that amount.

Number of Donations by Dollar Amount

Amount of Donation	2017	2018	2019	2020	2021
<$10	46.4%	46.5%	46.0%	47.8%	45.3%
$10-$25	24.7%	24.9%	24.8%	24.2%	23.6%
$26-$50	16.3%	16.1%	16.2%	15.8%	16.5%
$51-$100	9.0%	9.0%	9.2%	8.8%	10.2%
$101-$250	2.5%	2.5%	2.7%	2.4%	2.9%
$251-$500	0.8%	0.8%	0.8%	0.8%	1.0%
$501-$1,000	0.2%	0.2%	0.2%	0.2%	0.3%
$1,001+	0.1%	0.1%	0.1%	0.1%	0.1%

Number of Donations by Dollar Amount in 2021

$101-250 2.9%
$51-100 10.2%
$26-50 16.5%
$10-25 23.6%
< $10 45.3%
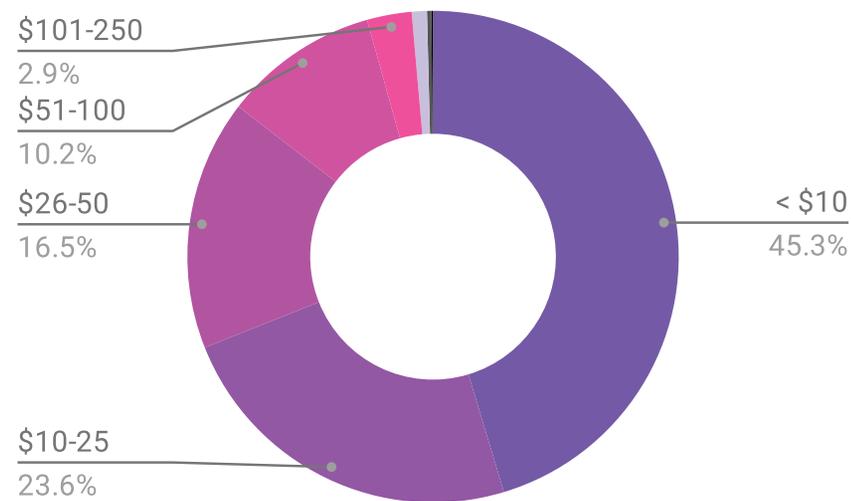
Total Value of Donations by Dollar Amount

	2017	2018	2019	2020	2021
<$10	7.8%	7.8%	7.5%	7.6%	6.4%
$10-$25	14.9%	15.2%	14.5%	15.3%	12.9%
$26-$50	20.3%	20.3%	19.7%	20.4%	18.7%
$51-$100	23.4%	23.6%	23.3%	23.7%	24.0%
$101-$250	13.5%	13.8%	14.5%	13.1%	14.2%
$251-$500	9.7%	9.6%	9.8%	9.6%	10.8%
$501-$1,000	5.6%	5.2%	5.5%	5.5%	6.6%
$1,001+	4.8%	4.5%	5.2%	4.9%	6.3%

Total Value of Donations by Dollar Amount in 2021

$1,000+ 6.3%
$501-1000 6.6%
$251-500 10.8%
$101-250 14.2%
< $10 6.4%
$10-25 12.9%
$26-50 18.7%
$51-100 24.0%
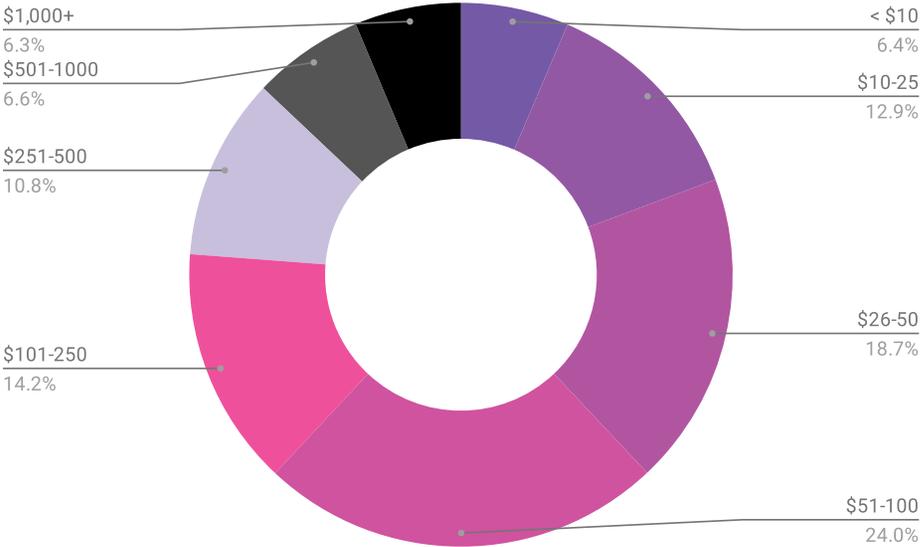
% of Donations Made vs. % of Total Donation Dollars

Legend: ▮ % Donations Made — ▬ % of Total Donation Dollars
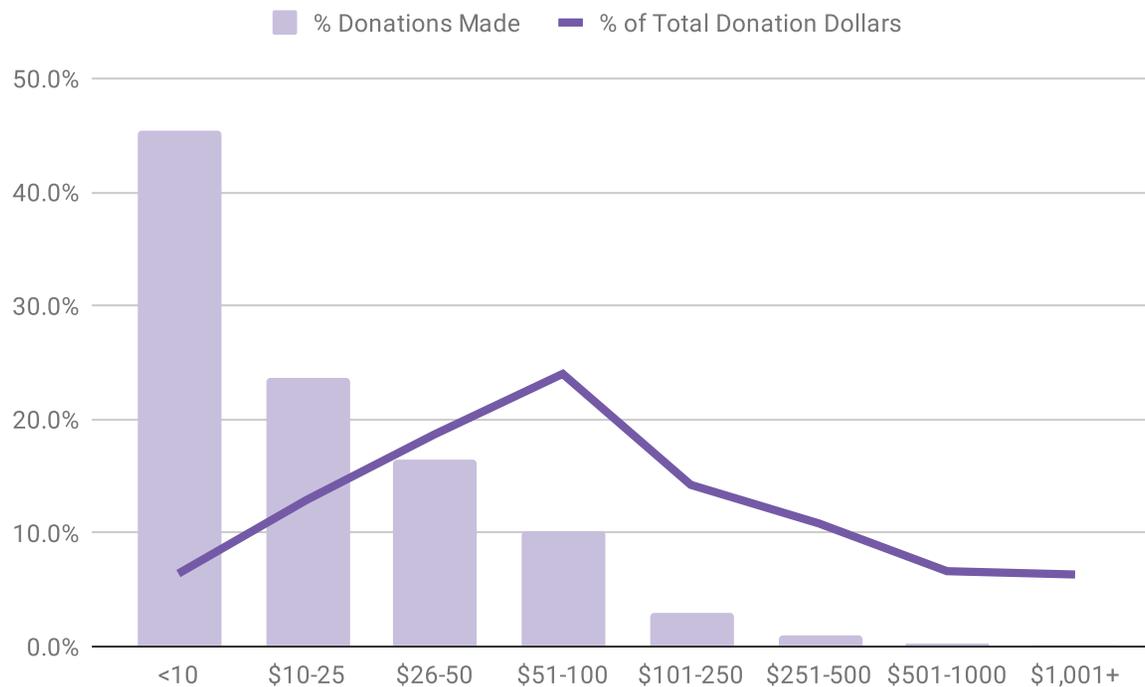
24% of donation dollars came from donations of $51-100 even though just 10% of donations were for $51-100.

(Chart: bar chart showing % Donations Made and line showing % of Total Donation Dollars across donation ranges: <10, $10-25, $26-50, $51-100, $101-250, $251-500, $501-1000, $1,001+. Y-axis 0.0% to 50.0%.)

Takeaways

- Make room for all kinds of donors. A single $10 donation may not go very far, but the cumulative effect of many $10 donations can be significant. Make every donor feel worthwhile by including a low-dollar donation option and an automatic thank-you email.

- Encourage donors to increase their donation amount by sharing real-world examples of the impact their gift makes on your mission. You just might get an extra $20 from a donor who understands how much of a difference a little more money can make.

- Don't shy away from asking for donations over $250 and even those as high as $1,000. While most of your donations will be smaller, nearly a quarter of 2021 donation dollars came from donations over $250, despite those making up only 1.4% of total donations. It just takes one or two high-dollar donors to make a big difference!

5.2
Fundraising

There are three basic ways to raise more on RunSignup:

- Simple donations during registration

- Basic 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 15,000+ events that enabled some type of donation collection, those who engaged supporters as fundraisers earned significantly more for their cause. Over nearly every metric, peer-to-peer fundraising events raised more in 2021 than in previous years, with donations making up a greater percentage of total transactions, more donations per event, and a higher average amount raised. While these increases do show that supporters are eager to support causes they believe in, some of the trend is likely due to improvements in our peer-to-peer fundraising software (like new gamification elements) and an emphasis on supporting fundraising events on our platform.

While peer-to-peer fundraising is the clear winner for organizations with committed supporters and the bandwidth to provide guidance, a checkbox on the checkout page can be a simple way to boost donations with minimal effort. Only a small percentage of events enable the checkbox, yet events that do enable it raise markedly more money on average than those that only collect donations during registration.

Money Raised by Fundraising Type

Type of Donations	Average Total Raised by Each Event					% of All Transactions (Including Registrations)				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
Donations Only	$527	$581	$670	$969	$1,011	3.5%	3.8%	4.0%	6.4%	5.5%
Donations & Fundraisers	$4,156	$4,745	$5,907	$5,733	$7,382	6.3%	6.6%	7.7%	11.4%	11.6%
Donations & Checkout Page	$1,244	$1,903	$3,186	$3,037	$4,178	0.5%	0.8%	1.6%	2.4%	2.5%

195% More Donations Per Race When a Checkbox Donation Is Enabled.

Number of Donations by Fundraising Type

Type of Donations	Number of Events					Number of Donations per Event				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
Donations Only	7,643	9,537	10,505	10,404	11,849	22	24	27	43	41
Donations & Fundraisers	1,754	2,068	2,288	3,116	3,460	77	91	111	107	121
Donations & Checkout Page	477	649	867	1,260	1,291	81	102	127	172	190

Events and nonprofits have long had a symbiotic relationship in which participants join events and are introduced to a cause, and supporters of a cause discover a new event because they want to help the organization. Despite the financial tumult of the last two years, generosity at events has grown.
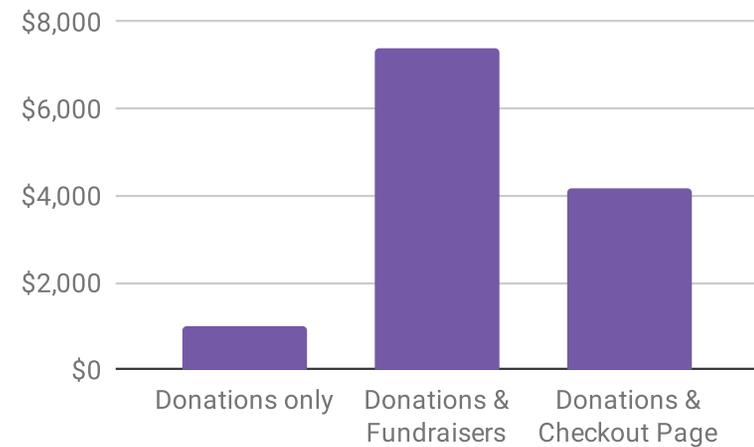
Takeaways

- Peer-to-peer fundraising events aren't just about raising more money now. While engaging your supporters as fundraisers increases your event revenue, it does more than that – it provides you with an opportunity to create stronger relationships and transform donors into lifelong advocates. If your organization has the time and energy, enabling and encouraging fundraising will help you raise more.

- Limited on time but still interested in boosting your donations? Enable the checkbox option at checkout to give your participants one last chance to donate to the cause.

5.3
Facebook Fundraising

Since introducing the free RunSignup – Facebook Fundraiser Integration in July 2019, nonprofits on the platform have raised more than $2.3 million on Facebook through connected fundraisers.

Linking a Facebook fundraiser to a RunSignup fundraiser makes it easier for your supporters to reach a wider audience and increase total donations. A slightly lower percentage of 2021 fundraising dollars were made on Facebook than in 2020, which is in line with a general drop in Facebook activity as in-person events rebounded. However, 13.1% of fundraising dollars on the platform came from Facebook even though just 5.4% of fundraisers linked to a Facebook fundraiser, demonstrating the importance of making donating *easy.*

Percent of Donations via Facebook and RunSignup

Type of Donations	2019 % of Donations	2020 % of Donations	2021% of Donations
Facebook	6.4%	15.0%	13.1%
RunSignup	93.6%	85.0%	86.9%

61.8% of Fundraisers reached their goal when RunSignup and Facebook Fundraising were enabled, while **just 15.7% reached their goal** with a RunSignup fundraiser alone

To get a sense of the impact that RunSignup's free Facebook Fundraiser Integration has on the efforts of individual fundraisers, we looked at the top 20 events using the integration in 2021 (those with the highest volume of donations via Facebook). On average, connected fundraisers raised 770% more than those who only raised money via RunSignup, and fundraisers with linked Facebook fundraisers were significantly more likely to reach their personal goals.

While this data is more volatile year over year due to the small sample size evaluated, one thing has been clear every year: connecting a Facebook fundraiser helps fundraisers reach their goals and raise more for your organization.

Top 20 Events with Facebook Fundraising Activated

	2019	2020	2021
Average # of Donations on Facebook	4.71	8.26	10.7
Average Amount Raised on Facebook	$210.23	$353.24	$641.95
Average # of Donations on RunSignup	7.05	2.85	2.6
Average Amount Raised on RunSignup	$447.15	$211.87	$154.44

Top 20 Events with Facebook Fundraising Activated: Individual Goal Attainment

	% of Fundraisers Who Reached Their Personal Goal	Average # of Donations per Fundraiser	Average Amount Raised Per Fundraiser
RunSignup + Facebook Fundraisers	61.8%	14.7	$1,105.30
RunSignup Fundraiser Only	15.7%	1.5	$127.04

Takeaways

- Empower your fundraisers by enabling the RunSignup-Facebook Fundraiser Integration. The ease of donating, expanded pool of potential donors, and lowered processing fees offset the loss of some donor data. More than that, setting up your fundraisers for success ensures they have a good experience with your organization and helps transform them into lifelong advocates.

- Peer-to-peer fundraising isn't a "set it and forget it" tool – fundraisers need support and guidance to succeed. Provide them with how-tos and technical support to help them get their fundraiser linked to Facebook and expand their pool of potential donors.

I know with RunSignup, I'm using the best and offering the best technology to my events. I'm not obligated to use their products and can easily use whatever my events prefer, but it is great when I'm able to help a race innovate and solve problems through the technology I can bring to the table. RunSignup steps up with its technology to solve the problems race directors and participants want and need."

- RICHARD LITTRELL
DoMore Race Services
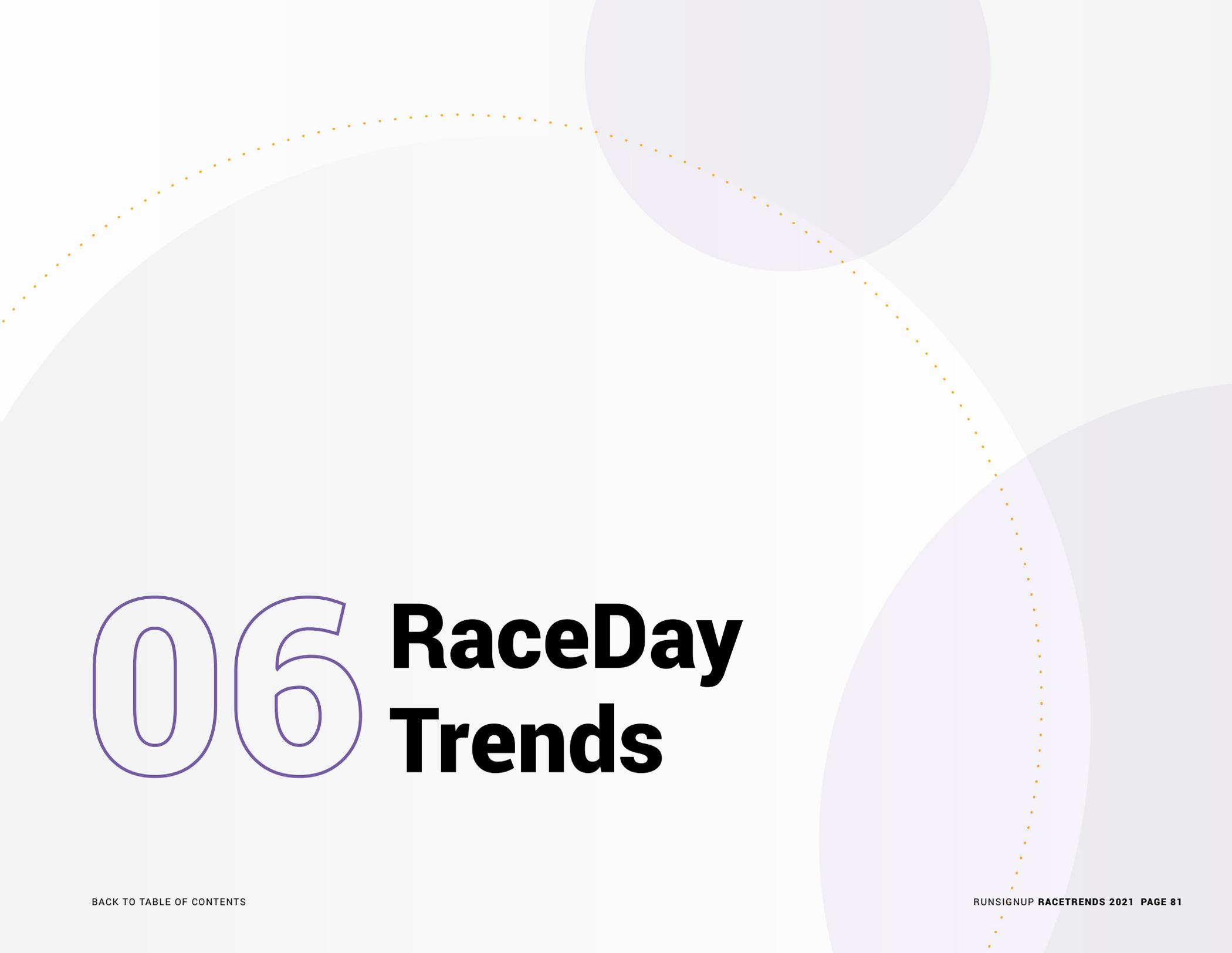
06 **RaceDay Trends**

RaceDay
Trends

Key Findings and Trends

- The RaceDay CheckIn App took off in the second half of 2021, with **6.5% of events using the RaceDay CheckIn App to check-in a record 22% of participants.**

- RaceJoy, the GPS-based runner-tracking app, continued its growth trend in 2021. Engagement on the app exploded in 2021, with **87% more spectators tracking participants and sending 142% more cheers than in 2020.**

- Timing businesses are largely worker-owned, with **89.3% timers reporting that the fully or partially own their business, despite the fact that 54.8% also have a full or part-time job** to supplement their timing income.

- A majority of timers (77.7%) offer additional services beyond timing, and services continue to expand. **In 2021, 38% of timers added new services.**

Conclusions and Recommendations

- As efficiency and touchless processes take priority, the RaceDay CheckIn App has taken a new role as the most beloved RaceDay tool. Provide training to your volunteers ahead of event day for a seamless experience.

- With in-person events back, so is the need for runner tracking and remote spectating. If you're working with your timer to offer RaceJoy, make sure you are educating participants on the basics of the app – and encouraging their "fans" to engage via tracking and cheers.

- Timing businesses often operate with lean teams and tight margins. Stay ahead of the game by keeping up with the latest technology and opting for options that make it easy to train new staff.

- Savvy timers are increasing their service offerings to stay competitive and build their book of business. Diversify your options to expand your market share.

6.1
RaceDay Registration

After a year of extreme procrastination in 2020, the percentage of registrations coming on race week and race day 2021 were similar to the patterns we saw pre-pandemic. In 2021, 2.2% of all registrations took place on race day, and 8.9% of race week registrations took place on race day.

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Takeaways

- To maximize registrations, make race day registration easier and more accessible. Leave online registration open until the gun goes off, add QR codes to help people register on their own devices, and implement on site registration for participants who aren't comfortable registering on a phone.

- Speed race day registration by limiting the questions asked when participants register last minute.

Percent of Registrations on Race Week and Race Day

Year	% of Race Week Registrations on RaceDay	% Total Registrations on RaceDay
2017	9.5%	2.4%
2018	9.0%	2.2%
2019	9.3%	2.3%
2020	11.8%	3.1%
2021	8.9%	2.2%

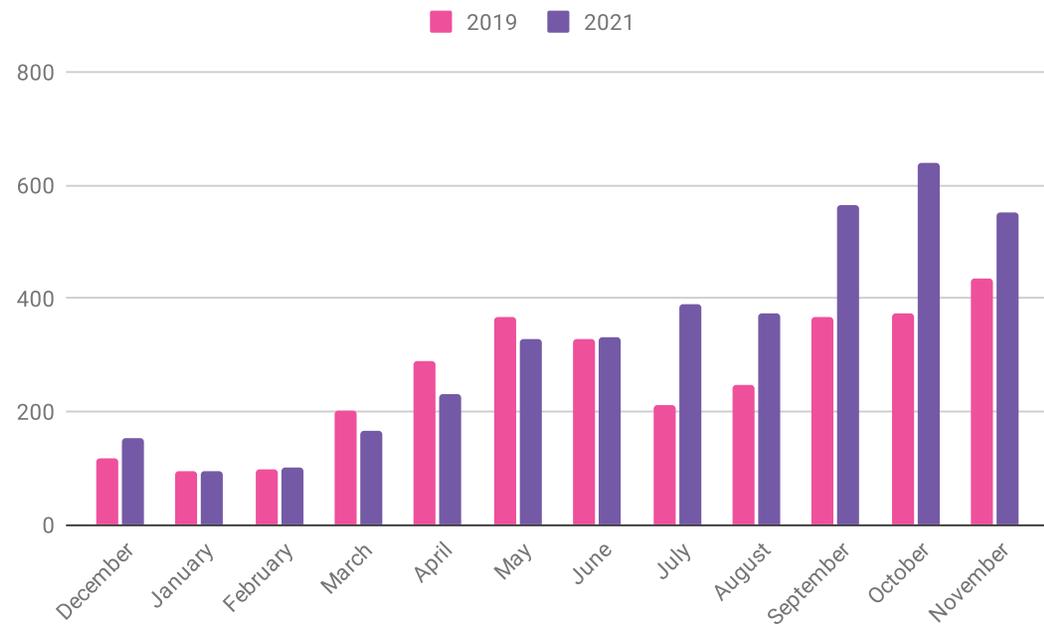**8.9%** of Race Week Registrations Came on **Race Day**

6.2

RaceDay CheckIn App Usage

The release of a new and improved RaceDay CheckIn App in 2021 was well timed to help events manage in-person participation efficiently and with limited contact. As a result, the CheckIn App set new usage records in 2021 despite the fact that 20% of events were virtual (requiring no check-in technology). The increase in app usage is particularly noticeable later in the year, as events tested out new technologies to help streamline their event day, reduce lines, and eliminate touchpoints.

Events Using the RaceDay CheckIn App

The percentage of runners checked in using the RaceDay CheckIn app grew at a faster rate than the number of events using the app. This indicates the app was adopted by larger scale events that need to efficiently check-in a larger number of participants.

RaceDay CheckIn App Usage

Year	Participants Checked in By App	Participants Not Checked In By App	Events Using CheckIn App	Events Not Using CheckIn App	% Runners Checked In with App	% Events Using the CheckIn App
2017	658,020	4,591,800	1,492	33,884	12.5%	4.2%
2018	820,285	5,357,381	2,102	40,636	13.3%	4.9%
2019	1,300,495	6,011,527	3,008	46,663	17.8%	6.1%
2020	383,492	4,329,888	1,486	45,407	8.1%	3.2%
2021	1,405,871	4,979,795	3922	55,963	22.0%	6.5%

Percent of Runners and Events Using RaceDay CheckIn App

Legend: ■ Percent of Events Using App ■ Percent of Runners Checked In by App
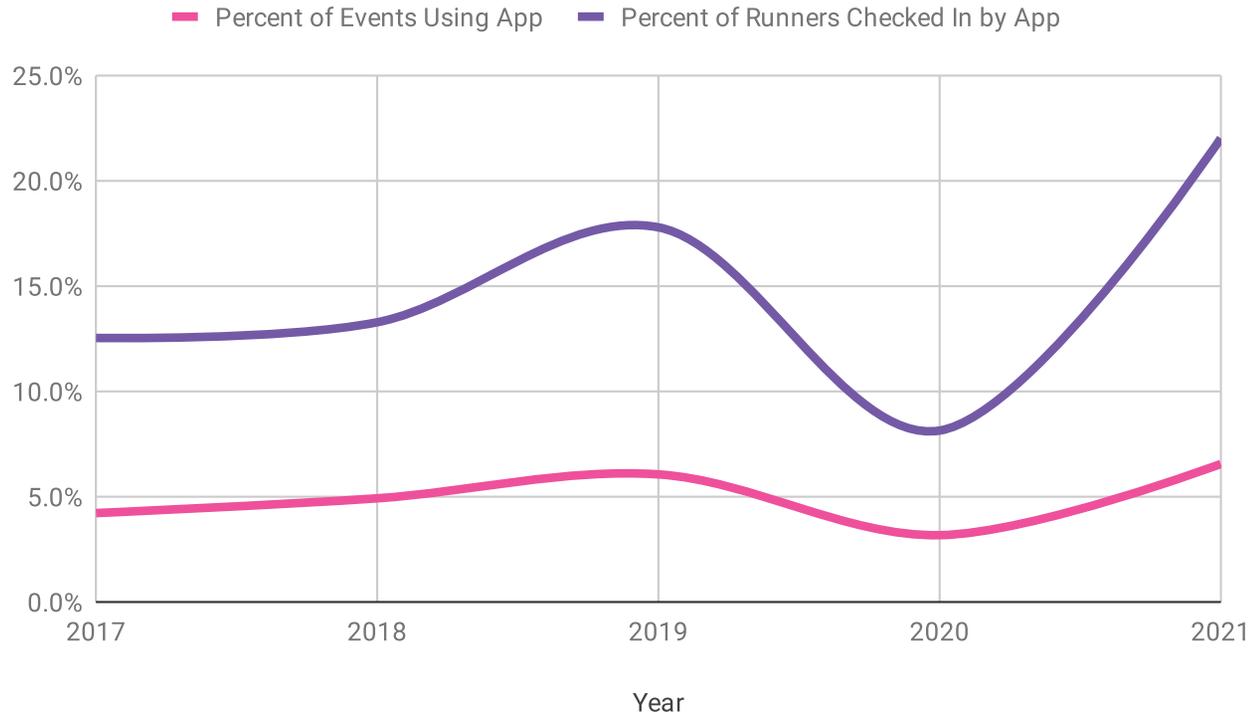
22% of All Participants Were Checked In With the RaceDay CheckIn App

In the 2021 Timer survey (see sections 6.6-6.8), responding timers reported the RaceDay CheckIn App provided the most value of all the RaceDay products during 2021.

Takeaways

- Train your volunteers to operate the RaceDay CheckIn App on their own mobile devices for a speedy and efficient packet pickup with limited technical support. Note: it's a good idea to have backup devices and backup power supplies on hand, just in case!

- Worried about rising event costs in 2022? Implementing dynamic bib assignment via the RaceDay CheckIn App can help you save money on the margins by eliminating the need to pay for unused chips.

6.3

Scored Results Notifications

This reports the usage of the RaceDay Results notifciations that includes sending instant results to particiants and spectators via text or email. In 2021, the average number of results notifications sent per event increased, suggesting that events offering notifications were larger on average. This pattern of notifications sent is more similar to pre-pandemic years than it is to 2020, when the events sending notifications were most likely to send fewer than 99. In 2021, more than 1,300 events sent between 100-499 notifications, while 428 events sent more than 1,000 notifications.

As events return in-person, runner tracking options are increasingly important. However, with real-time GPS tracking providing a more realistic remote tracking experience, it will be interesting to see if usage of results notifications continues to grow.

Takeaway

- Consider a range of technologies to bring your race day to life. Participants (and their remote spectators) have a range of comfort levels with different tracking strategies, and offering both GPS tracking and results notifications allows a wider range of people to remain engaged in your event.

Number of Events vs. Number of Notifications Sent
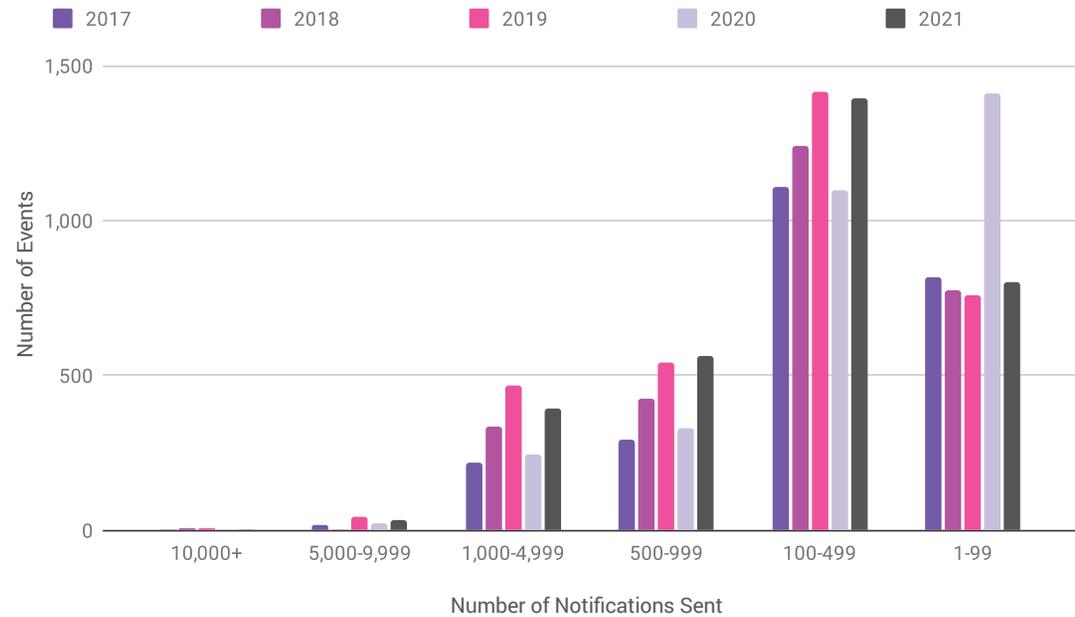
Number of Notifications	2017 # of Events	2018 # of Events	2019 # of Events	2020 # of Events	2021 # of Events
10,000+	3	5	5	3	3
5,000-9,999	18	3	42	20	33
1,000-4,999	221	335	468	244	392
500-999	292	424	543	330	563
100-499	1,107	1,239	1,415	1,097	1,394
1-99	818	774	759	1,408	800

6.4

The Race Director

The Race Director scoring software, our legacy scoring software created by Roger Bradshaw, saw a rebound in usage in 2021 with 10,259 events utilizing The Race Director to score 3,409,159 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.

3,409,159

Participants Timed By The Race Director

The Race Director Usage

	2017	2018	2019	2020	2021
Total Races	15,040	15,403	15,340	5,078	10,259
Total Participants	5,952,791	4,996,330	6,438,967	1,452,755	3,409,159
Average Race Size	396	324	420	286	332

Takeaway

- Look for scoring software data to continue to shift over the next few years as legacy scoring options are replaced by newer technologies. With a high demand for new timers, timing software solutions with an easy learning curve, like RaceDay Scoring, will have more bandwidth to grow.

6.5
RaceJoy GPS Tracking

141.6%
More Cheers Sent in 2021 than 2020

RaceJoy had another record setting year, with 1,215 events offering the GPS runner-tracking option. While the total number of tracked participants decreased slighlty in 2021, spectator engagment and use of the app increased significantly in 2021.

In 2020, RaceJoy shifted from an on-site tracking option designed to help spectators find and follow their runners to a race anywhere tool to enhance the virtual race experience. Because of that, more participants utilized the app than ever; however, fewer spectators engaged with participants of virtual events. In 2021, we saw the reverse: slightly fewer participants used the app than in 2020 (although more than in any pre-pandemic year), but cheer-sending and spectator usage ticked back up.

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

RaceJoy Usage

| RaceJoy Usage	2017	2018	2019	2020	2021	Change 2019-2021	Change 2020-2021
Races	207	197	410	1,097	1,215	196.3%	10.8%
Tracked Participants	73,040	86,005	108,451	165,373	142,650	31.5%	-13.7%
Spectators	118,692	93,513	162,109	87,038	162,735	0.4%	87.0%
Progress Alerts	2,312,161	2,904,057	3,823,954	1,303,158	3,168,372	-17.1%	143.1%
Cheers Sent	283,598	381,245	477,053	198,375	479,363	0.5%	141.6%

Races Offering RaceJoy
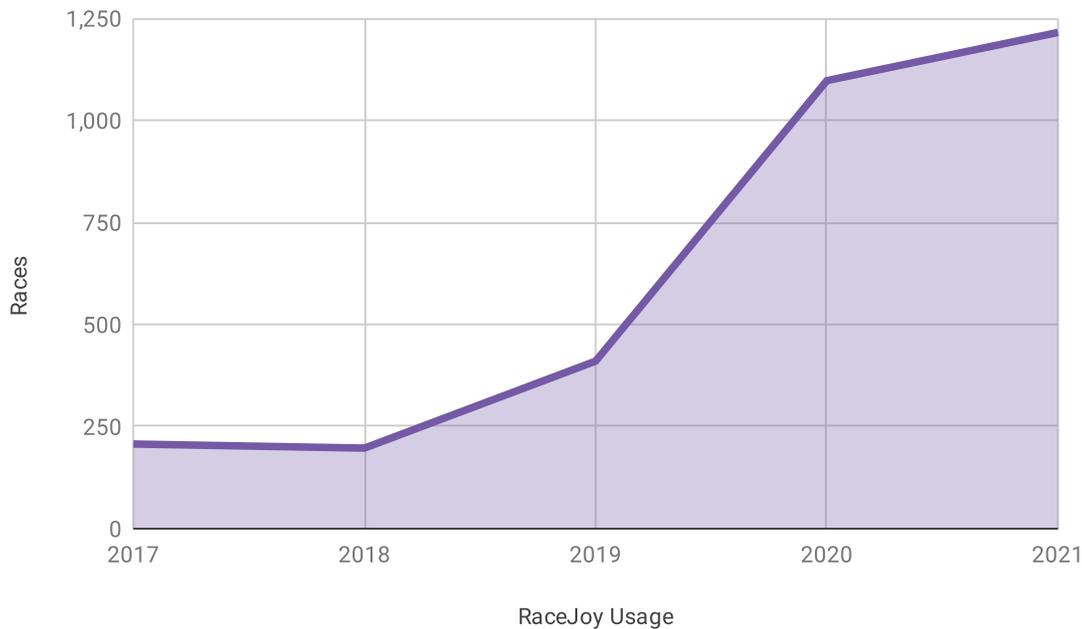
RaceJoy Usage: Tracked Participants and Spectators

RaceJoy Usage: Cheers Sent
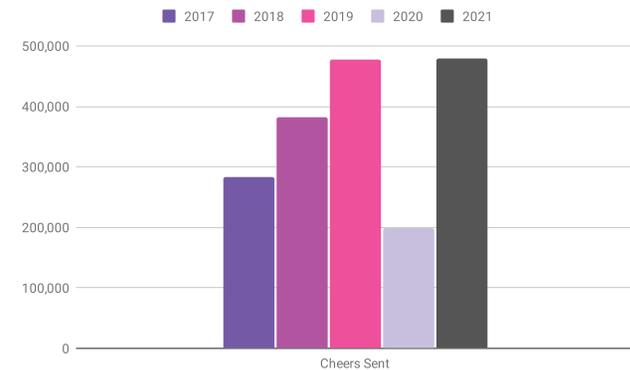
Takeaways

- Engagement and the race day experience is the name of the game as in-person events return. Offer RaceJoy runner tracking to participants to expand the number of spectators for your event without drastically increasing the number of people on-site. Encourage cheer-sending to mimic a large crowd along your race course.

- RaceJoy can be a key point of connection for hybrid events with both in-person and virtual options. Record a unique audio experience that both types of participants can enjoy, creating an event with a unified experience for runners in different geographical locations

2021 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 road map. In 2021, we looked at:

- **The profile of a timing company**

- **The types of services offered by timing companies**

- **The role of remote timing**

- **Trends in technology usage**

Contact and identifying information was not required for participation in the survey.

Survey Collection

This timer-specific survey was issued in November of 2021. Timers were reached for response in multiple ways, including through email (to RunSignup's email list), on RunSignup's social media and blogs, and through Facebook groups targeting timers.

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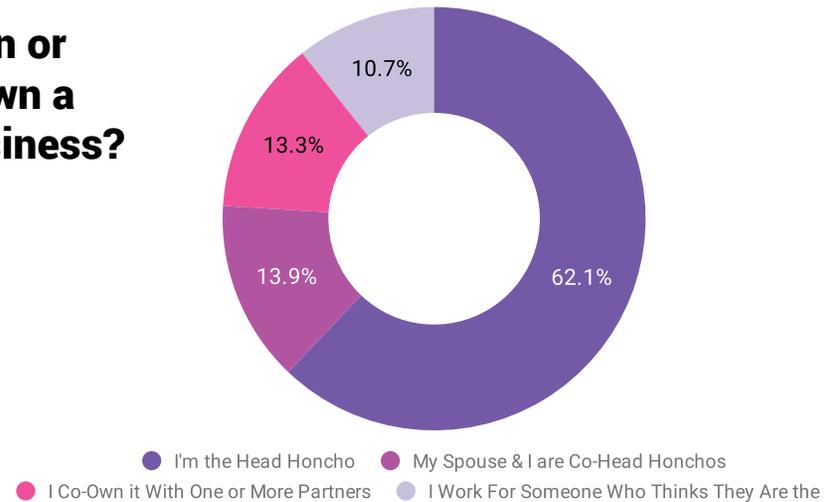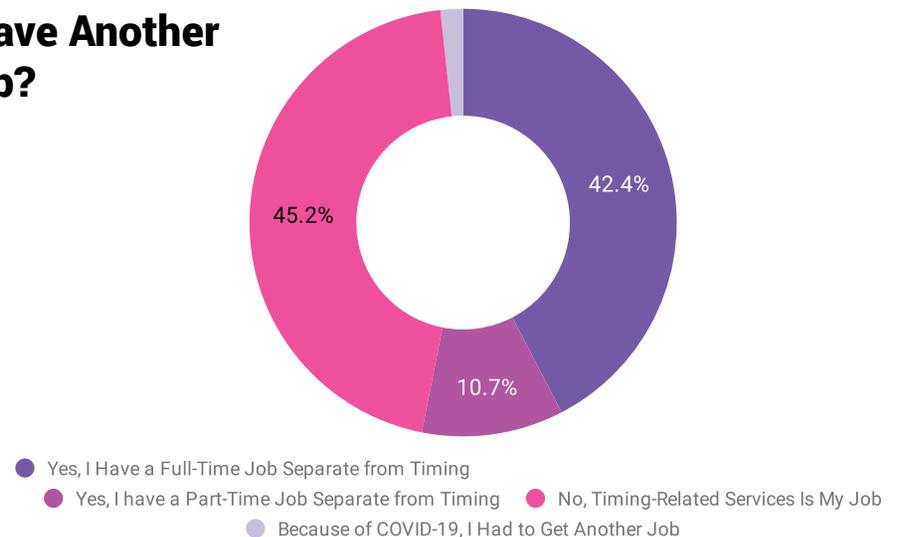
180 Survey Responses

6.6

The Timing Business

This set of questions establishes the ownership and staffing patterns of timing businesses, as well as the number of events each company served. Notably, while 89.3% of respondents indicated that they owned part or all of the timing business, a majority of them (54.8%) noted that they also work at least a part-time job outside of timing.

### Do You Own or Partially Own a Timing Business?

- 62.1% — I'm the Head Honcho
- 13.9% — My Spouse & I are Co-Head Honchos
- 13.3% — I Co-Own it With One or More Partners
- 10.7% — I Work For Someone Who Thinks They Are the

Do You Have Another "Real" Job?

- 42.4% — Yes, I Have a Full-Time Job Separate from Timing
- 10.7% — Yes, I have a Part-Time Job Separate from Timing
- 45.2% — No, Timing-Related Services Is My Job
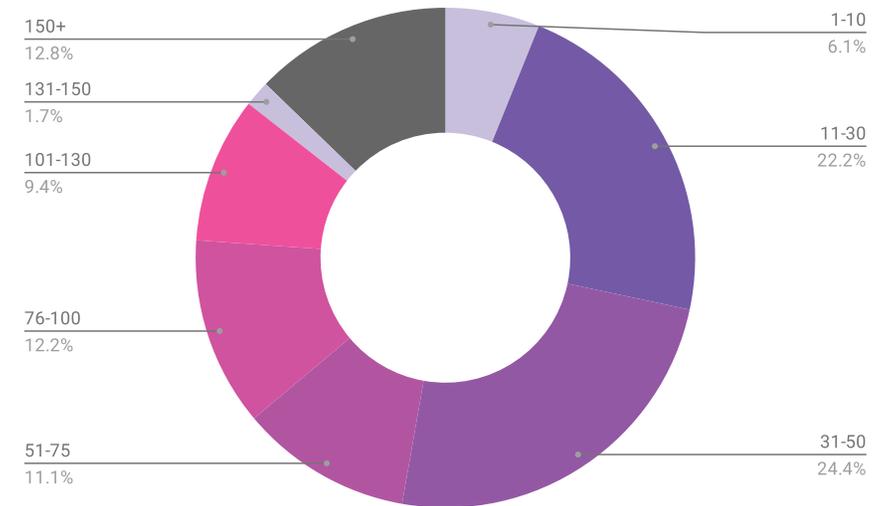- Because of COVID-19, I Had to Get Another Job

Unsurprisingly, lead timers are the most commonly employed staff. Additionally, many businesses employ on-course support, non-technical staff, administrators, and people to certify and measure courses.

What Types of Staff is Involved With Your Timing Business?
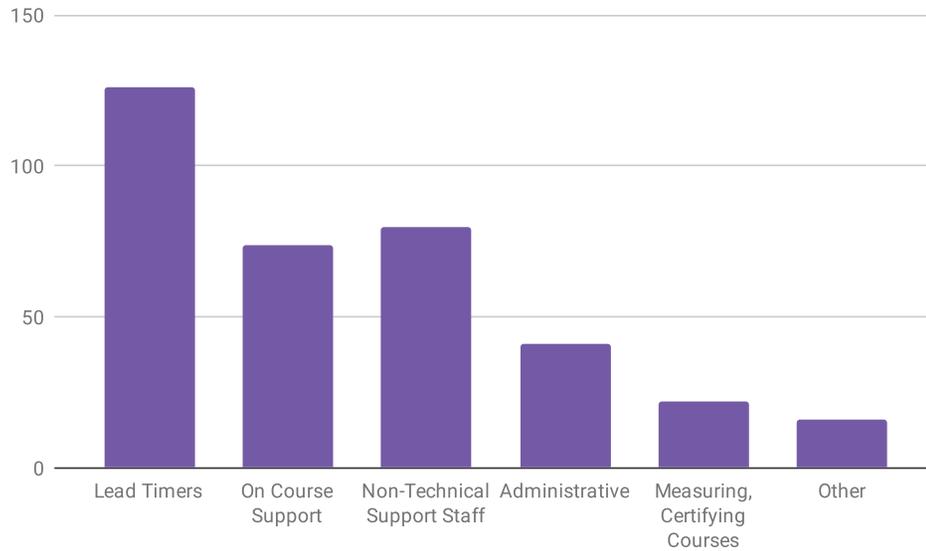
These lean, mean timing machines service dozens (or even hundreds) of events each year. While businesses range widely in scope, and impressive 47.2% of them support more than 50 events each year.

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

- 150+ — 12.8%
- 131-150 — 1.7%
- 101-130 — 9.4%
- 76-100 — 12.2%
- 51-75 — 11.1%
- 1-10 — 6.1%
- 11-30 — 22.2%
- 31-50 — 24.4%

Takeaways

- Race timing is a labor of love, with services often provided by small teams led by hands-on owners. Despite this, they provide services to a wide range of events each year, with nearly a quarter (23.9%) of businesses supporting more than 100 races each year.

- Profit margins in race timing are small, with many providers supplementing their timing income with an outside revenue source. Time and resources for training and new technologies may be limited.

6.7
Event Services

The majority of timers (77.7%) offer additional services beyond race timing. Providing a wide array of services can help timing companies remain competitive and increase profit margins — and over the last two years, virtual race services have supplied something of a lifeboat for some timing companies.
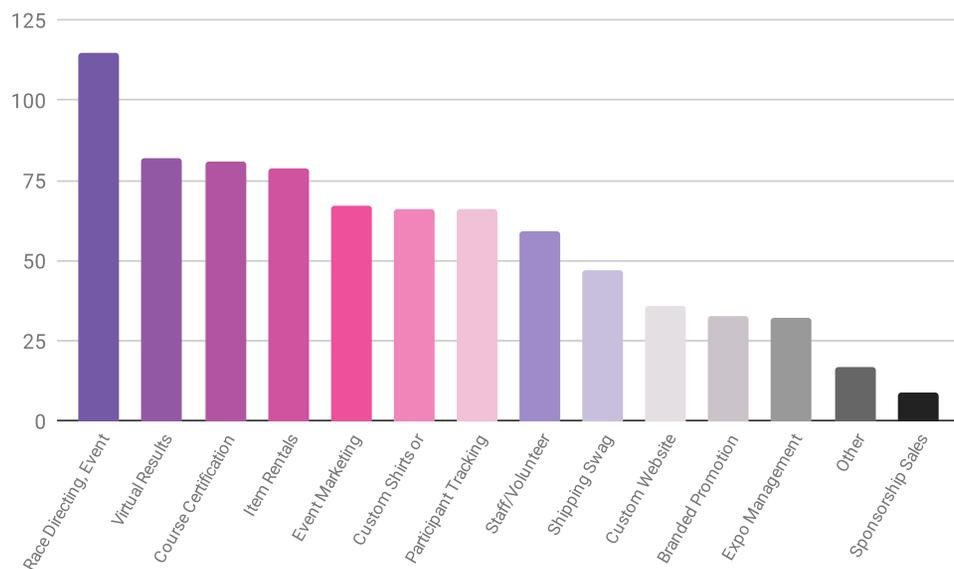
78%

of Timers Offer Services Beyond Timing

Do You Provide Services Outside of Timing?

No
22.3%

Yes
77.7%
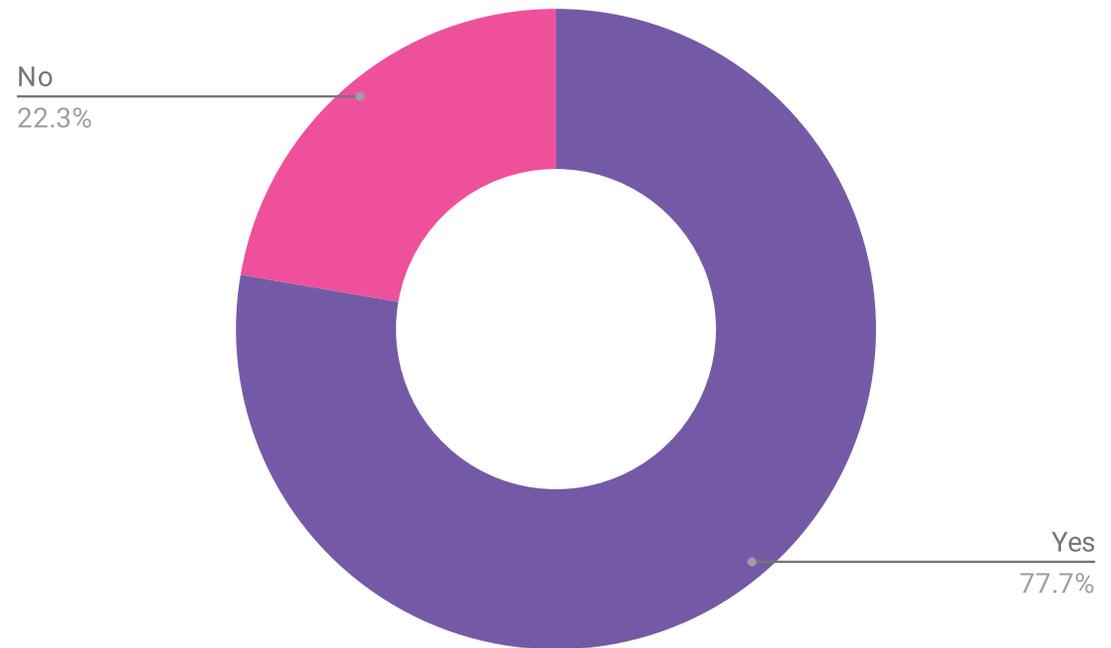
The most common services offered by timers include race directing and event management, virtual results, course certification, equipment rental, and event marketing.

What Other Services Do You Provide?

Timers continue to expand their range of services, with 38% of timers adding additional services to their menu in 2021. New service options included the return of chip timing, QR code readers for accessing results, runner tracking, swag shipping, and video boards.

Did You Start Offering New Services or Technology This Year?

Yes
37.9%

No
62.1%
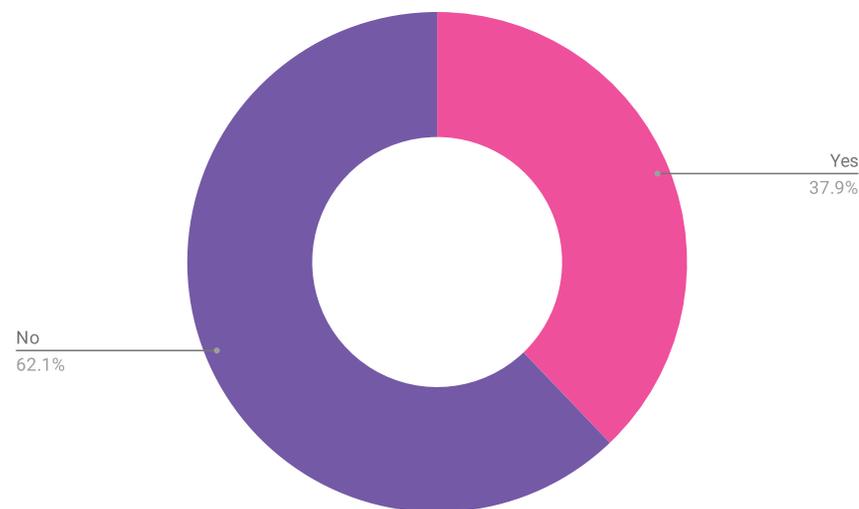
Takeaway

- Make your timing business indispensable by expanding your roster of services. Timers who can help their clients throughout the race lifecycle will build stronger relationships, foster loyalty, and create a more stable business.
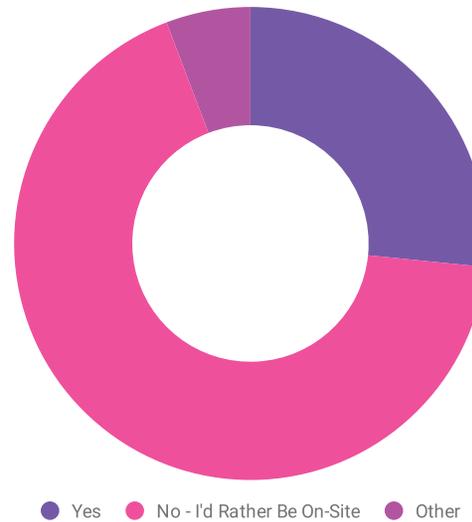
6.8

Remote Timing

Remote timing, or producing results without having a timer physically on-site, has been a hot concept in 2021. Just over a quarter of all timers reported that they planned to do some remote timing this year.

27%

of Timers Plan To Time Remotely In 2022

Do You Plan on Remote Timing This Year?

● Yes   ● No - I'd Rather Be On-Site   ● Other

Remote timing comes with some benefits for both the timer and the event. Negating the need for travel saves time and money for the timer and expands the geographical region that they can cover. For the race, remote timing is often less expensive.

On the other hand, timers shared a few of the obstacles that keep them from remote timing. These include the challenges of relying on race staff to correctly set up unfamiliar timing equipment, unstable internet/cellular conditions, difficulty responding quickly to problems and complexities, and missing out on relationship-building with the event.

Takeaway

• Remote timing has both pros and cons. Adding it to your set of options can help you expand your book of business without requiring significantly more staff, but savvy timers will make sure they evaluate races on an individual basis to determine if they are a good fit for remote timing.

6.9
Timing Technology

Timers are frequently seen as the technology experts in the endurance industry, and we survey their preferences to help us understand trends in the market.

Responses in this section are likely impacted by the disproportionate number of RunSignup users in the sample, with an overrepresentation of software 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).

Registration Company

As expected, RunSignup was the most used registration platform by both the timer survey and Race Director users. As the endurance registration market has contracted over the last few years, this list has shrunk to a relatively small group of registration options.

Registration Company (fromTimer Survey)
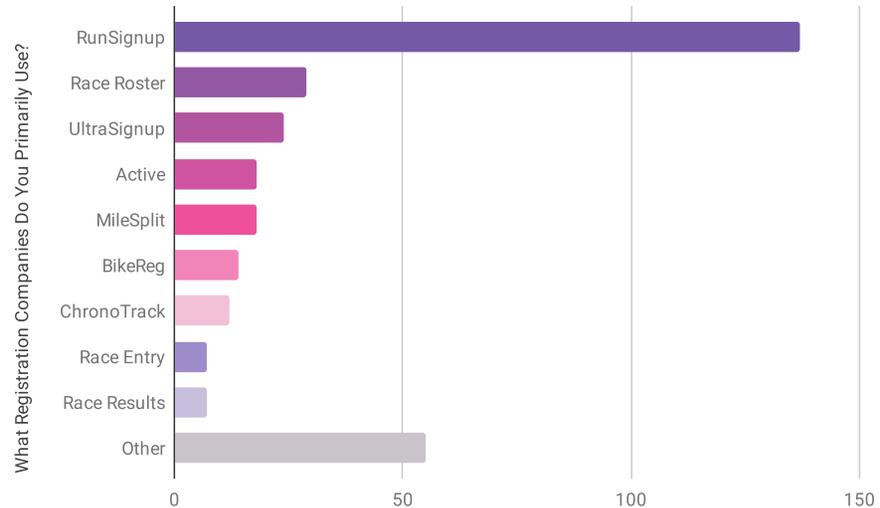
Races by Registration Company Integration (from Race Director data)
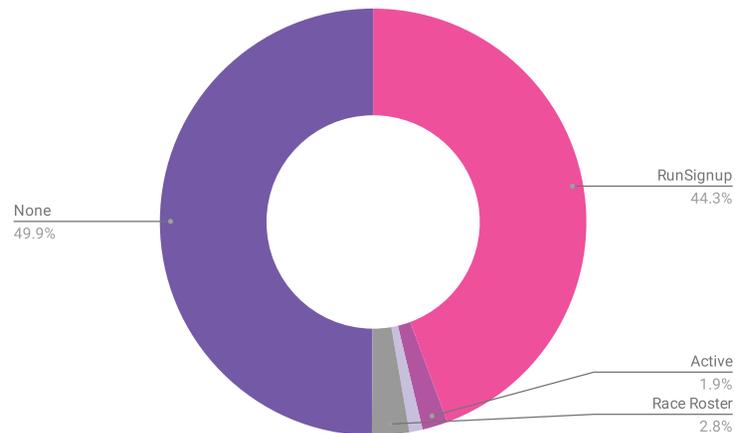
Timing Hardware

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

Race Director Data

Scoring Hardware	Percent of Races
IPICO	22.3%
RFID	19.9%
MYLAPS	18.4%
None	11.4%
ChronoTrack	11.3%
RACE RESULT	6.2%
Trident	9.6%
Other	0.8%

Timer Survey Responses

Scoring Hardware	Percent of Timers
MYLAPS	18.6%
FinishLynx	16.5%
RACE RESULT	14.8%
Other	13.5%
ChronoTrack	10.1%
RFID	10.1%
IPICO	8.9%
Trident	6.3%
Jaguar	1.3%

MYLAPS Hardware Was Used By 18.6% of Survey Respondents and 18.4% of Races Scored By The Race Director

Scoring Software

For the first time we saw change in the top two scoring software choices, with the next generation scoring solution, RaceDay Scoring, bumping out long-time leader RunScore. While the dominance of RunSignup owned software 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 cross-country events in their response.
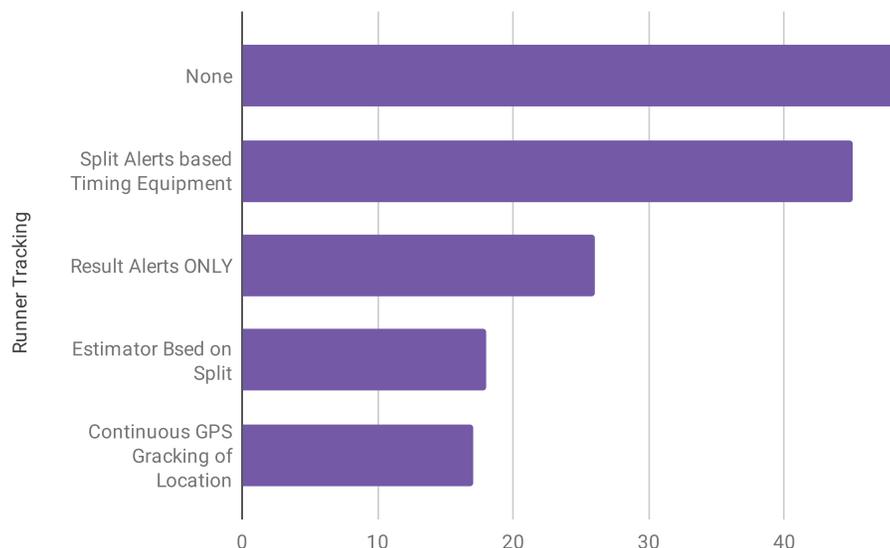
Scoring Software (Survey Respondents)

68.8%
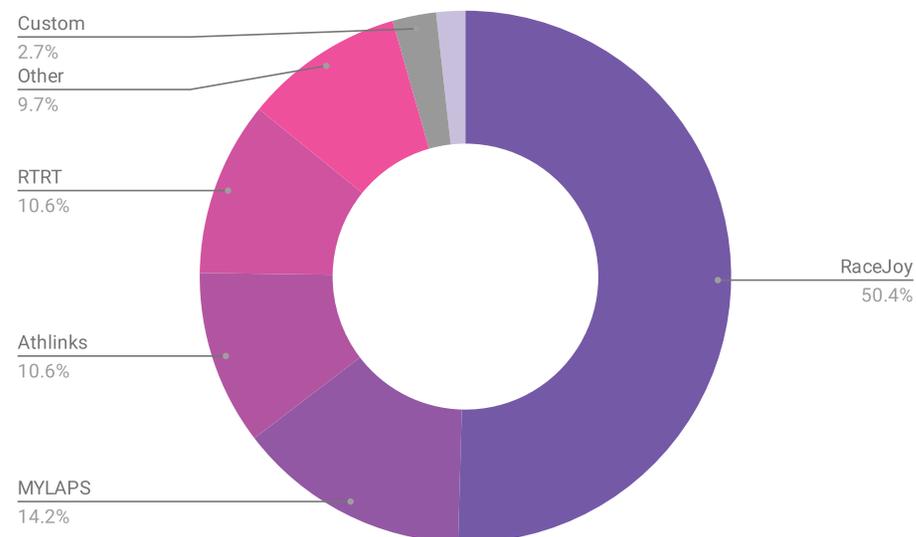of Timers Offered Some Type of Participant Tracking
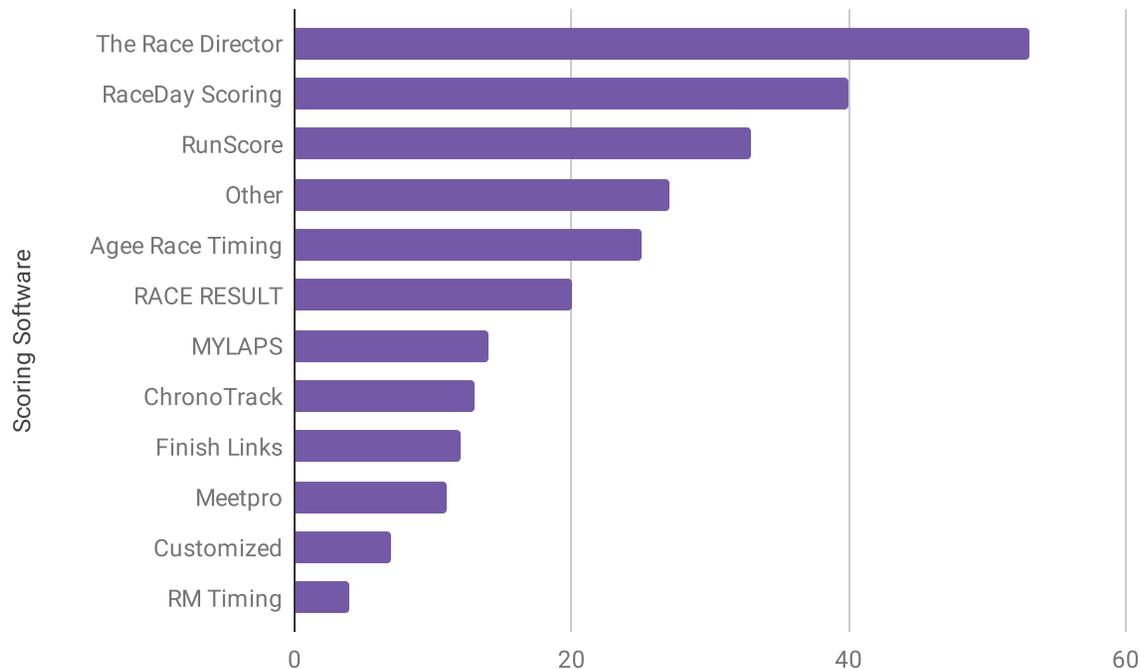
Participant Tracking

In addition to final results, timers are often the providers of participant tracking both during and after the event. While RaceJoy was the most frequently offered, timers also offered tracking via MYLAPS, RTRT, and Athlinks.

What Type of Participant Tracking Do You Offer?

Runner Tracking

- None
- Split Alerts based Timing Equipment
- Result Alerts ONLY
- Estimator Bsed on Split
- Continuous GPS Gracking of Location

(x-axis: 0, 10, 20, 30, 40)

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

- Custom 2.7%
- Other 9.7%
- RTRT 10.6%
- Athlinks 10.6%
- MYLAPS 14.2%
- RaceJoy 50.4%

Takeaways

- Look for open technology platforms that allow you to pick and choose the registration, software, hardware, and tracking solutions that make the most sense for your timing business.

- To scale your business quickly, consider easy-to-use technology solutions with a fast learning curve and a robust set of documentation and training options.

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