THE MASS PARTICIPATION PULSE 2024

January 2024

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WELCOME
TO THE SECOND EDITION OF THE MASS PARTICIPATION PULSE REPORT

Established in the wake of lower than anticipated levels of event entries post-pandemic, our ambition for The Pulse is to provide actionable insight to support event organisers, brands and anyone else with an interest in seeing more people, taking part in more events, more often.

Our belief is that the best route to this growth is through better understanding current and potential event participants; why they take part, their behaviours, needs, thoughts and their attitudes towards active events. We hope that this report provides those insights, highlights trends and identifies opportunities to support the growth we all want to see.

While last year's report focused heavily on attitudes to events post-COVID, this edition of The Pulse sheds additional light on the ongoing cost-of-living crisis's impact on participants and event involvement. Happily, our research suggests that yes there are challenges, but also positive trends and clear opportunities for the mass events industry, suggesting there is cause for some optimism for the years ahead.

We hope you find this year's insights valuable. If you have questions, information to share to help improve the report or want to be involved in next year's Pulse – please don't hesitate to get in touch.

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KEY FINDINGS FROM THIS YEAR'S REPORT:

- People are doing more events. The median number of events people reported taking part in during 2023 is now back to the pre-pandemic levels we last saw in 2019

- Female participants are back, after being the group most likely to report taking part in fewer events immediately after the pandemic. Female participants increased participation levels by more than men in 2023 and are more positive about 2024

- A new generation is arriving, with almost 10% of people we spoke to having taken events and activity up since the end of the pandemic

- Younger participants (18-34 year olds) are most likely to plan on doing more events in 2024

- People plan to do more events, despite pressures on income. 41% of people we spoke to are planning to increase the number of events they will do in 2024 compared to last year

- Cost of living pressures are starting to hit home, with 58% reporting falls in disposable income in 2023 and 48% expecting levels of income to fall again this year

- Participants are concerned about rising event costs but see value in the great experiences events can offer

- Sustainability continues to grow in importance for event participants, with younger participants more than twice as likely to say event organisers are not doing enough around sustainability

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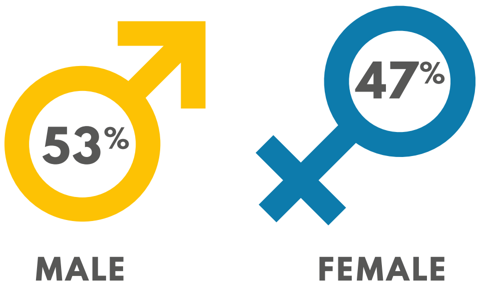
RESPONDERS PROFILE

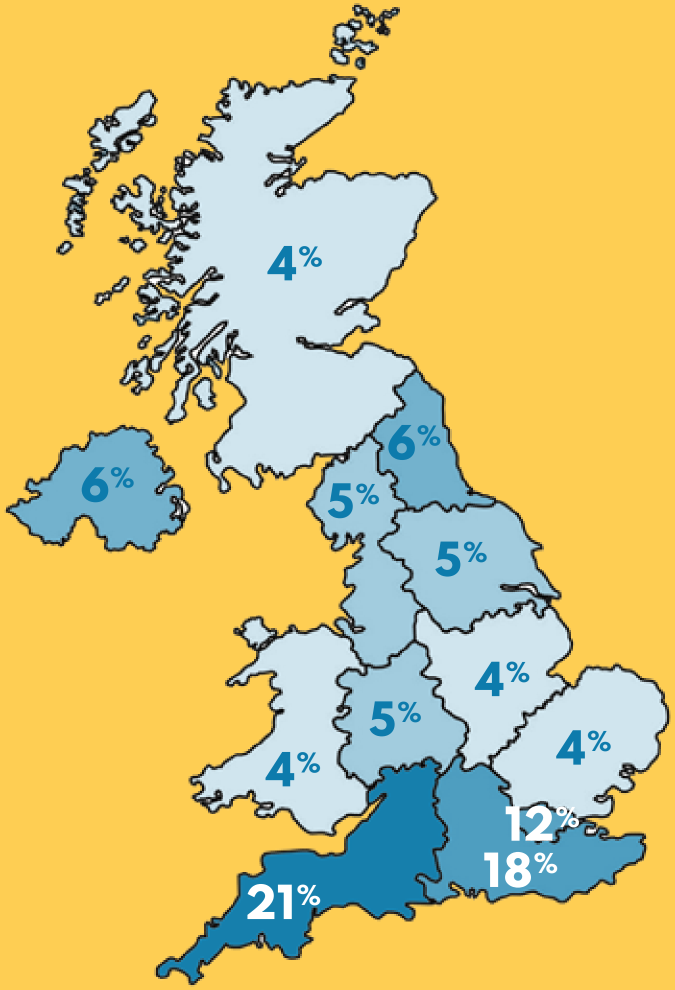
This year's report pulls together insight from almost 3,000 survey responses. Responses were from mass participation event participants recruited through event providers, entry platforms and sports media in the UK and Ireland throughout October 2023.

Respondents represented a range of age groups with an overall average age of 49, slightly older than the UK average of 41.

They represented all areas of the country and came from households with a range of income levels.

Pleasingly, responses were close to equally split between male and female participants although our respondents are less ethnically diverse than in 2022 so this is something we want to improve on in the future.





41 UK AVERAGE

AVERAGE RESPONDER AGE 49

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ACTIVITY

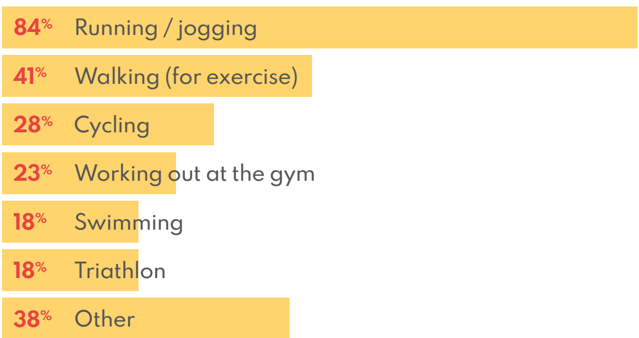
While running is clearly the most popular event and activity type, our respondents take part in a wide range of exercise types and events.

As you might expect, younger people were more likely to exercise at a gym, men more likely to cycle and women more likely to swim or walk for exercise.

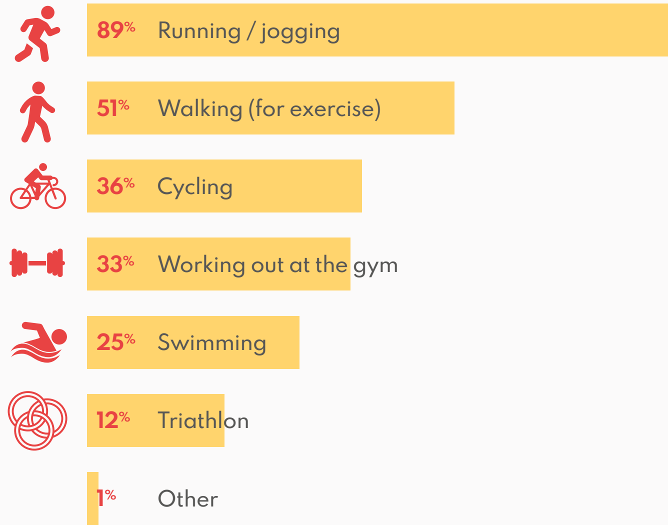
It is clear that very few people stick to just one regular activity or event type, suggesting only a small minority see themselves as being just 'a runner' or just 'a triathlete'. This indicates there may be opportunities to encourage people to 'jump' sport and try different activities or move between event types. It may also suggest an opportunity for activities like walking for exercise or swimming whose popularity in terms of a form of exercise are not matched in terms of event participation.

Post-pandemic, as you may expect, we have seen a fall in demand for virtual events with only 12% reporting that they "still enjoy taking part" in virtual events. This fall in demand is more acute for those under 35 years of age but perhaps reflecting cost of living pressures, virtual events remain more popular with those from households with lower levels of income.

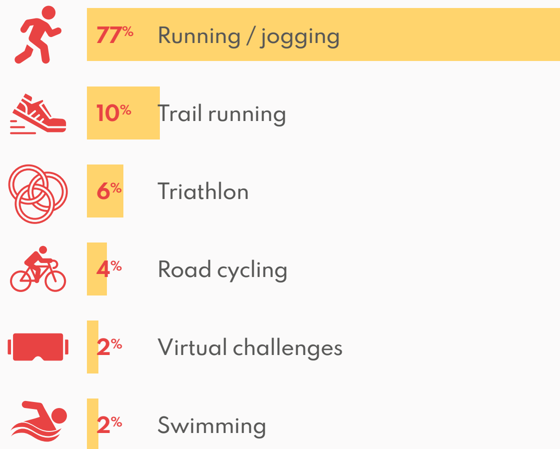
TYPES OF MASS PARTICIPATION EVENTS YOU HAVE TAKEN PART IN OVER THE LAST 5 YEARS



TYPES OF EXERCISE YOU DO REGULARLY



TYPES OF MASS PARTICIPATION EVENTS YOU DO MOST OFTEN



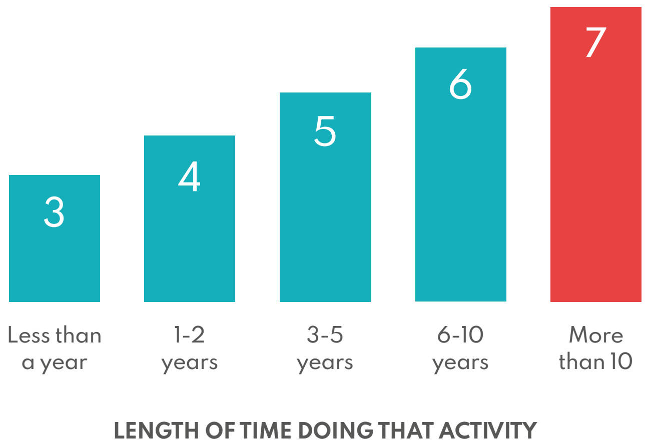
ACTIVITY

Given concerns over declining event participation in 2022 being driven by barriers to taking up exercise habits during COVID, we looked at how long respondents have been involved in physical activities.

Pleasingly, almost 10% had taken their activity up since the pandemic. This is even more encouraging given the positive relationship we found between the number of events people report taking part in each year and how long they have been taking part in their chosen activity.

This relationship also indicates that there is real value for event organisers in developing long term relationships with their participants.

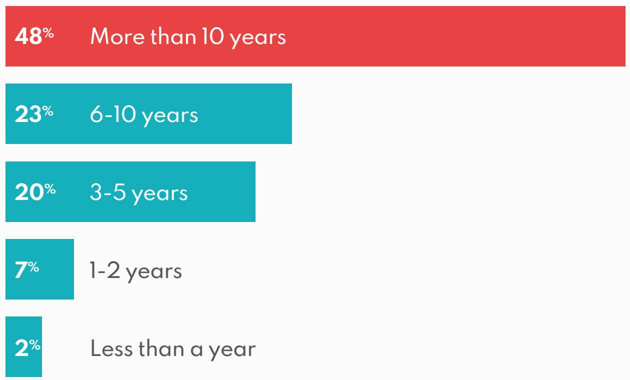
MEDIAN NUMBER OF EVENTS TAKEN PART IN THIS YEAR



While we need to be cautious about the assumptions we can make of the data, it is interesting to see the high percentages of people taking part in events that have also taken part in activities designed to get people active.

Overall, 37% of those we spoke to had taken part in an initiative to get people active, such as Couch to 5k, Run Together, jogscotland or This Mum Runs. 22% of respondents had taken part in Couch to 5k, rising to 40% of those who have been taking part in events for 2 years or less. This suggests that these initiatives are succeeding in breaking down barriers to event participation by helping people become more active.

HOW LONG HAVE YOU BEEN DOING THIS TYPE OF ACTIVITY?



PARTICIPATION

After a disappointing 2022 for some, it's reassuring to see the median number of events people report taking part in rising back to levels last reported in 2019.

Happily, we are also seeing positive intentions when it comes to participation in 2024.

41% are reporting they will do more events in 2024 vs only 12% who expect to do less, which bodes well for the year ahead.

Looking deeper into the data;
Whilst on average men did more events than women, women were more likely to say they increased the number of events they took part in during 2023.

It's also pleasing to see that 18-34yr olds were significantly more likely to report intending to increase the number of events they will take part in during 2024.

Highlighting the connection between fitness and mass participation events, fitness is the biggest single factor for people doing more events, with 30% sighting improved levels of fitness as a reason for increasing the number of events they will do.

HOW MANY MASS PARTICIPATION EVENTS DO YOU THINK YOU WILL HAVE PARTICIPATED IN BY THE END OF 2023?

MEDIAN NUMBER OF EVENTS

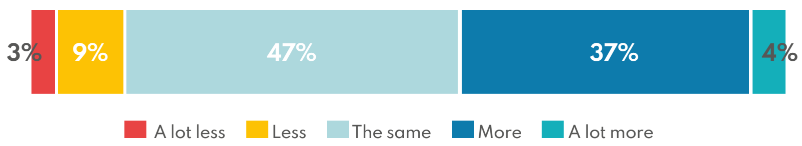
5 EVENTS IN 2023

4 EVENTS IN 2022

5 EVENTS IN 2019

2024

HOW DOES THE NUMBER OF EVENTS YOU EXPECT TO TAKE PART IN NEXT YEAR COMPARE TO THIS YEAR?



CHOOSING AN EVENT

For the second year we asked what factors participants considered when choosing which events to enter and the improvements they would like to see made to events.

DISTANCE **DATE**

PRICE **LOCATION**

CHOOSING AN EVENT

As in 2022, it's clear most participants chose their event first on distance, then on date, location and price before factoring in the course and the event reputation.

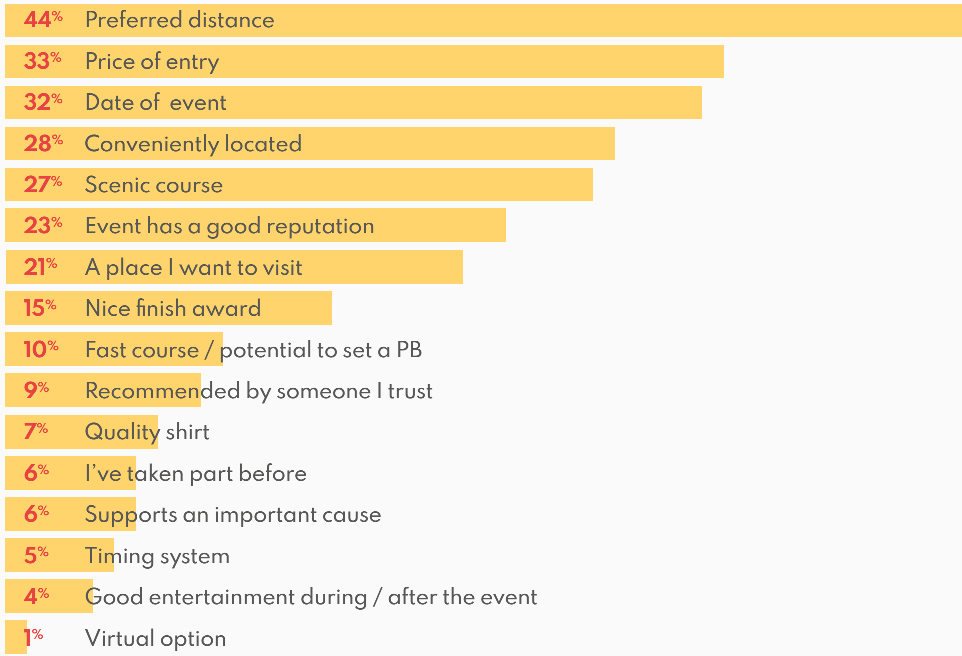
Although not a significant shift but perhaps reflecting current times, entry price has moved from 3rd place in 2022 to 2nd place this year in terms of consideration.

IMPROVING EVENTS

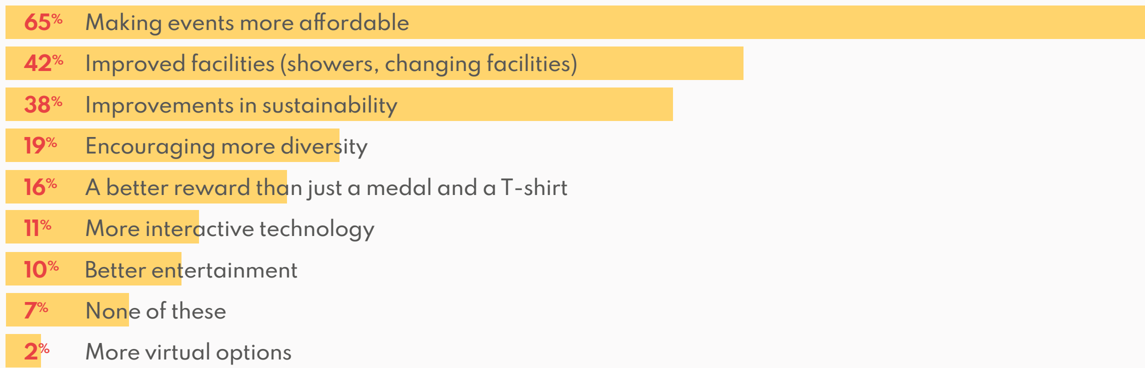
Again, there has been little change since 2022, with making events more affordable still the top request. Interestingly though the percentage of people selecting this option is unchanged since last year.

The biggest changes we have seen are in demand for improved sustainability and improvement in facilities, suggesting that perhaps participants are becoming more demanding as entry prices begin to rise.

WHICH OF THESE ARE MOST IMPORTANT WHEN CHOOSING AN EVENT TO TAKE PART IN?



WHICH OF THESE WOULD YOU MOST LIKE TO SEE IMPLEMENTED IN THE FUTURE?



Participants asked to pick 3 options.

WHY DO PEOPLE TAKE PART IN EVENTS?

Clearly all participants do not take part in events for the same reasons and most sign up for a mix of reasons.

Based on our research this year and last, we have identified that participants tend to be driven by 1 of 3 primary motivations which has enabled us to segment the audience for events into 3 roughly equally sized groups.

Socially motivated – those who are driven by sharing experiences and participating with others and see events as opportunity to spend time with friends and family, connect with others with a shared interest and have a great day out.

Health and fitness – those who are motivated by reaching a personal goal or milestone, maintaining motivation to keep a healthier lifestyle, losing weight, improving fitness, and feeling happier about themselves.

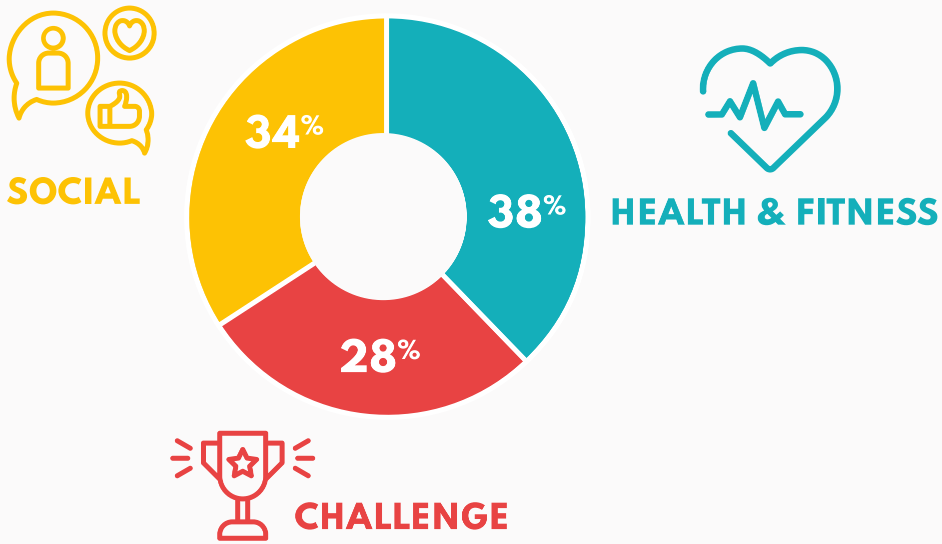
Personal challenge – those who are motivated by the challenge and opportunities events give them to push themselves, improve performance and test themselves and their capabilities.

Beyond this 'high-level' view we have further segmented the mass participation events audience to give us 8 distinct profiles and will be working in the months ahead with partners to develop personas for each segment to better understand their profile, behaviours and media use.
Our aim is to help others better recruit, retain and inspire each group to do more events, so look out for this research later this year.

WHY DO YOU TAKE PART IN MASS PARTICIPATION EVENTS?

MOTIVATION

Please rank the following factors from **1 (most motivating)** to **6 (least motivating).**



FINANCES

It will surprise nobody to know that participants are currently feeling the pinch.

58% had less disposable income in 2023 and 45% expect to see it fall again this year.

Although all are affected, younger and older participants are less impacted, with the mid range of 35-55 year olds most likely to be pessimistic about their finances in 2023 and the year ahead.

That said, event participants are still slightly wealthier than the general population, and 48% of respondents reported household income above £60k.

The most common level of spend on shoes, apparel & equipment remained at **£200-299pa** with a slight fall in the % spending **over £500pa (13%).**

Median spend on entries is up on last year at **£169pa** with an increase in the percentage of those spending more than **£300pa (22%).**

These figures suggest people may be prioritising event spend over apparel, or making the kit they have last a little longer.

It is also interesting to note that although related, household income is not the main influencing factor when it comes to level of spend on apparel and events.

WHAT IS YOUR HOUSEHOLD INCOME?

<£30K
17%

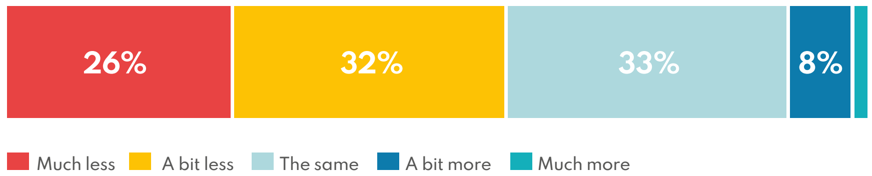
£30-60K
35%

£60-90K
27%

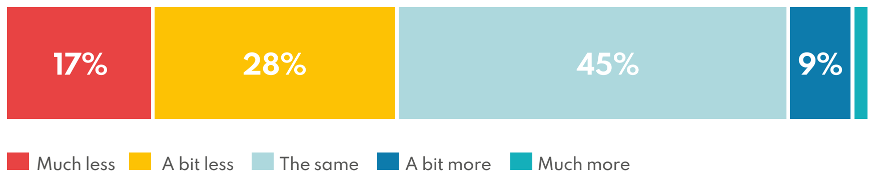
£90K+
21%

FINANCES

HOW HAS YOUR DISCRETIONARY INCOME CHANGED THIS YEAR COMPARED TO LAST YEAR?



HOW DO YOU THINK YOUR DISCRETIONARY INCOME WILL CHANGE NEXT YEAR COMPARED TO THIS YEAR?



Discretionary income is money that you have left to spend after you've paid tax and living expenses e.g. rent/mortgage, bills and food.

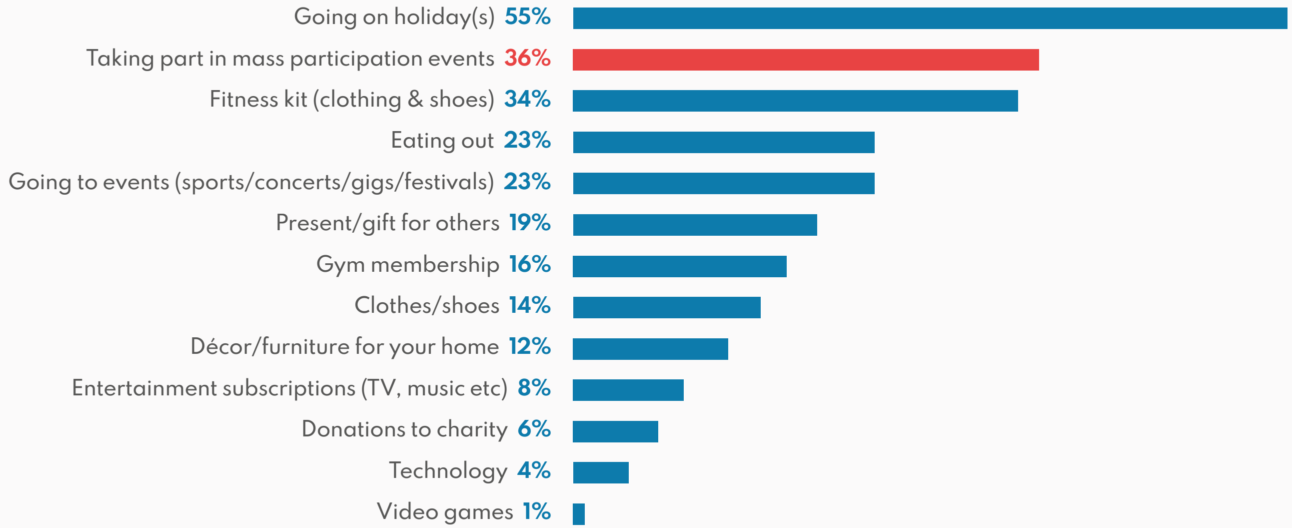
FINANCES

As disposable income levels fall, prioritising spend becomes much more important so we examined how event and kit spend compares with other demands on participant's income.

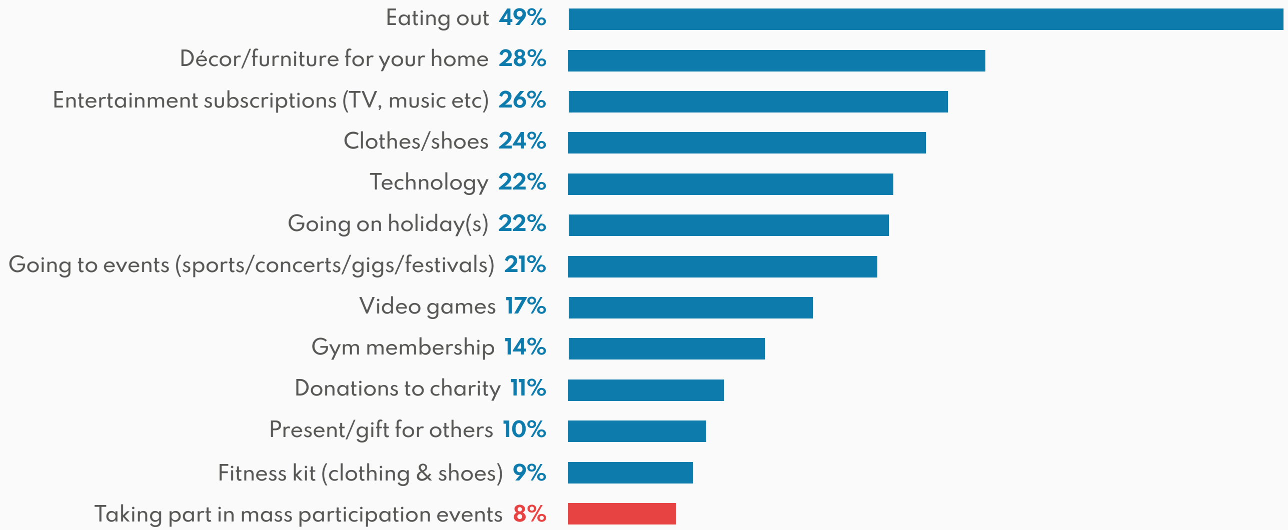
As with 2022, whichever way you ask the question it is pleasing to see that event spend is seen in the same category as holidays, experiences and rewards so is being protected by participants.

Clearly the impetus for event organisers is to make the case for events as experiences that deliver something special and beyond the everyday to ensure consumers continue to protect this spend and fund it by cutting back spend in other areas.

WHICH OF THESE ARE YOU MOST LIKELY TO PRIORITISE SPEND ON?



WHICH OF THESE ARE YOU MOST LIKELY TO CUT BACK ON IF YOU'VE GOT LESS TO SPEND?



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VALUE FOR MONEY

As well as looking at how spending is being prioritised, we were keen to explore attitudes to the value that events offer.

Asked if events are "good value for money" only 23% agreed vs 34% who felt events didn't offer good value for money.

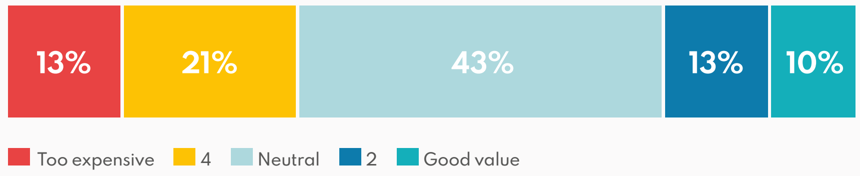
This is clearly concerning and shouldn't be ignored by event organisers, but digging deeper into the numbers it becomes apparent that age is a more significant influence on attitudes than household income. 18-34 year olds are significantly more likely to report events as offering value for money than older event participants.

Reassuringly, when participants are asked to choose between lower prices or a better event experience there is a reasonable preference for experience over cost. 47% are accepting of price rises to reflect the impact of inflation with only 25% keen to see organisers cut back on the overall spend on event experience to mitigate against increases in entry fees.

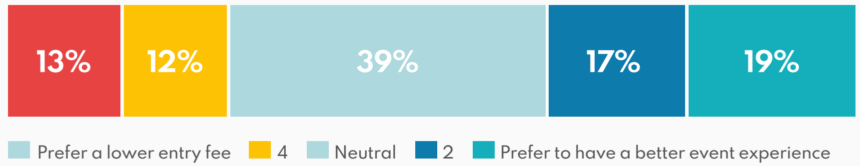
It's also interesting to see that for those who cut back on the number of events they took part in during 2023, while 41% did so for financial reasons, the majority 59%, did so for reasons that event organisers are much more able to influence.

WHY HAVE YOU TAKEN PART IN FEWER EVENTS THIS YEAR?

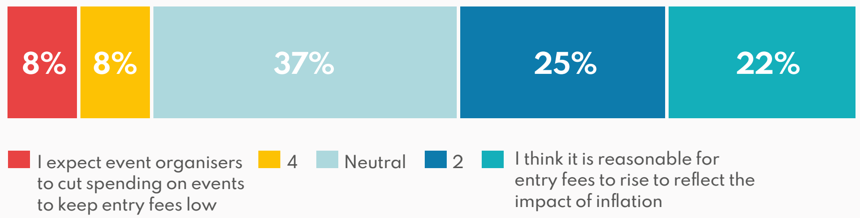
ARE EVENTS GOOD VALUE FOR MONEY?



COST VS EXPERIENCE



EFFECT OF INFLATION



VALUE FOR MONEY

BRANDS

With 25% of event participants spending £400 or more on apparel and footwear in 2023, and brands sponsoring many of the major events, we wanted to understand which brands are most important to event participants.

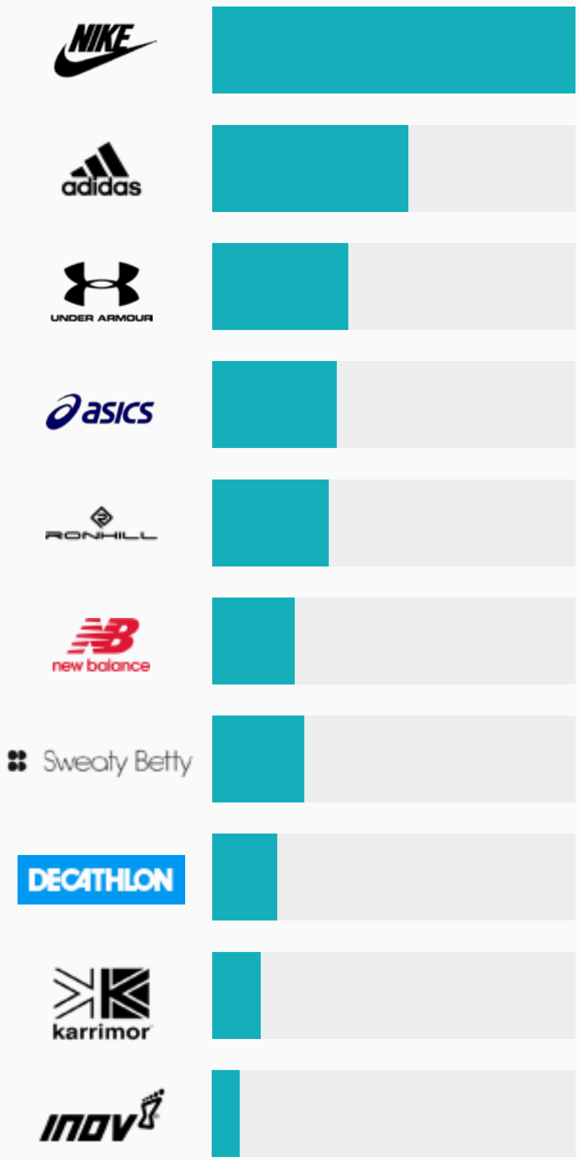
Unlike in 2022, this year we asked respondents for their 3 favourite brands for footwear and clothing unprompted (as opposed to choosing from our suggested brands).

Although this made little difference to the #1 brands, it has made a difference to which brands appear and the order they are ranked within the top ten.

FAVOURITE BRANDS

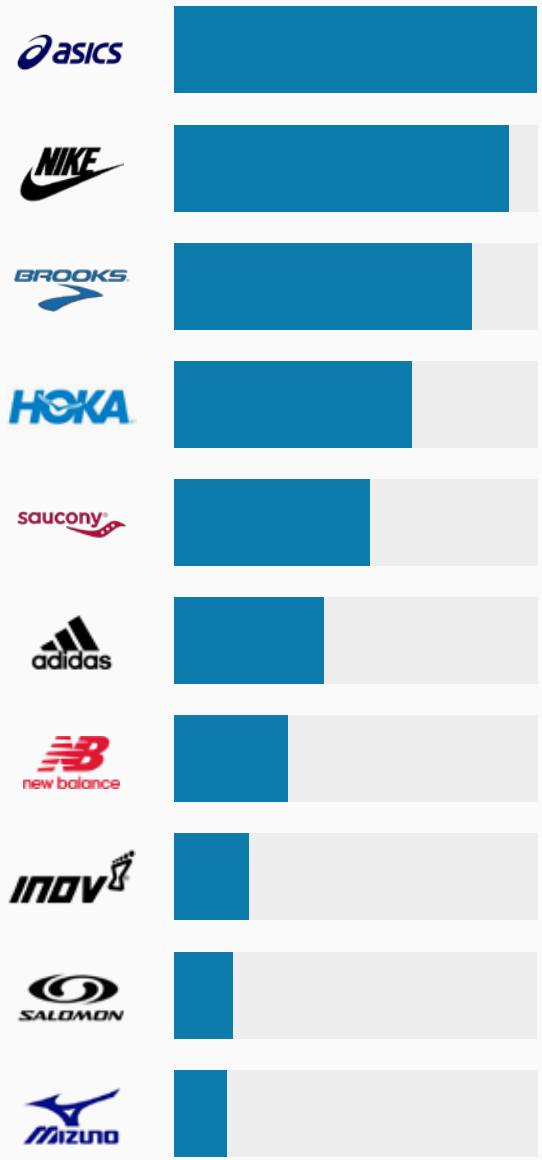
APPAREL

What are your three favourite brands of clothing to wear when exercising?



FOOTWEAR

What are your three favourite brands of footwear to wear when exercising?



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SUSTAINABILITY

As demands to do more about sustainability increase, we wanted to explore this area in more detail.

The 26% of respondents who felt like organisers are doing enough to make their events more sustainable was almost matched by the 24% that do not agree.

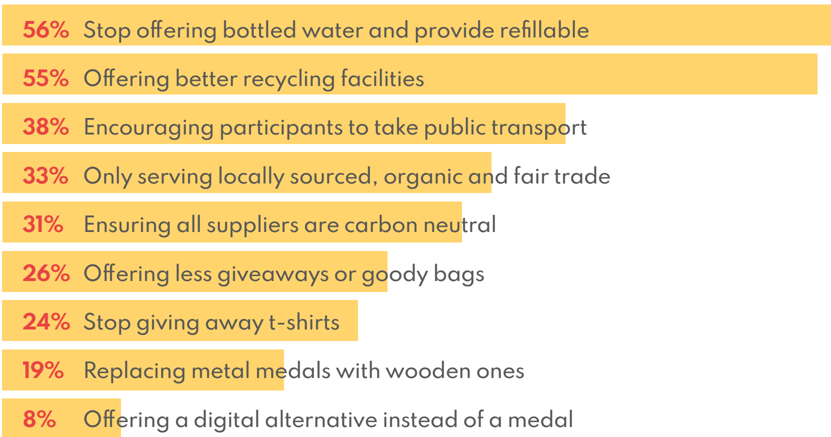
Digging deeper, 47% of respondents under 35 do not think event organisers are doing enough to make their events more sustainable.

So this is an issue that is and will become increasingly important to a growing segment of event participants.

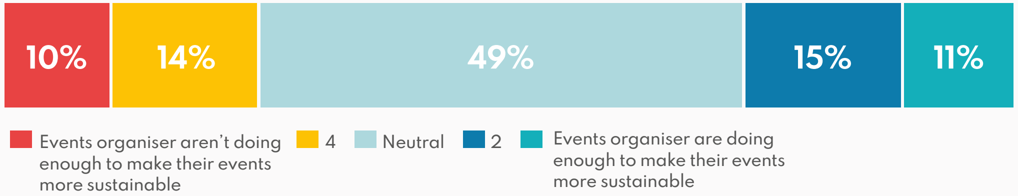
More difficult to decipher is what participants want organisers to do or the sacrifices they are willing to make to support greater levels of sustainability. Our view is that saying you are willing to make sacrifices and then being happy about them on event day are slightly different things so we think more testing and insight will be needed here to balance expectations and keep participants happy on event day.

Looking specifically at the option of offering additional payments to help offset carbon emissions, 35% would be willing to pay to help offset their emissions but less than half are willing to pay more than £5 to support this.

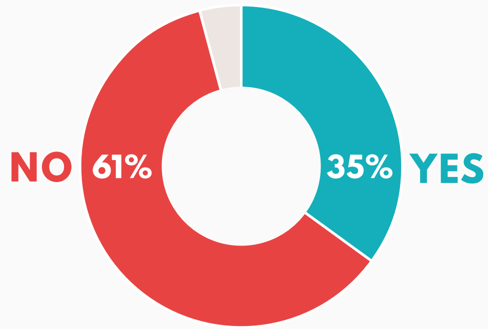
WHICH OF THESE SUSTAINABILITY INITIATIVES WOULD YOU MOST LIKE TO SEE IMPLEMENTED AT EVENTS IN THE FUTURE?



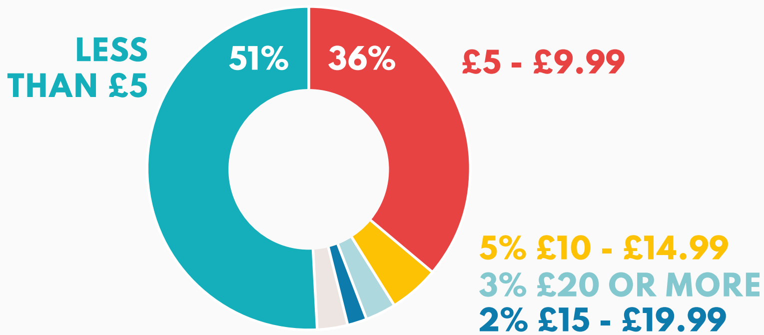
ARE EVENT ORGANISERS DOING ENOUGH TO MAKE THEIR EVENTS MORE SUSTAINABLE?



IF THERE WAS AN OPTION TO PAY TO CARBON OFFSET YOUR ENTRY WOULD YOU PAY IT?



HOW MUCH WOULD YOU BE WILLING TO PAY?



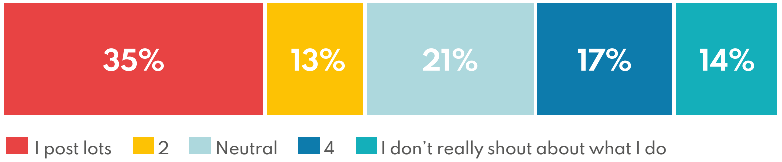
MARKETING & SOCIAL

97% of respondents are accessing one or more social media platforms or forums at least once a week so it is hardly surprising that after cross promotion by event organisers and the ubiquitous Google, social media is the third most popular channel for hearing about events.

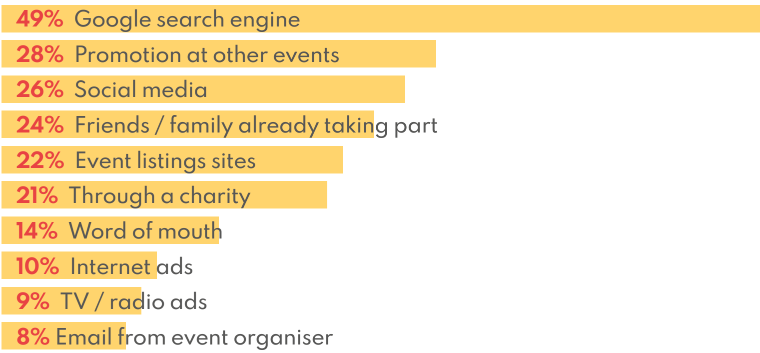
As with sustainability, we are seeing an emerging divide when it comes to age, with younger audiences more likely to be heavy social media users.
They also over index amongst the 31% of participants who say they "post a lot" about the events they take part in as opposed to those who are more passive consumers of information and posts about events.

Facebook remains the most popular platform across the board but again there are sharp differences across the generations and between men and women. We can see that younger audiences prefer Instagram, Snapchat and YouTube and men are more frequent users of X, LinkedIn and YouTube.

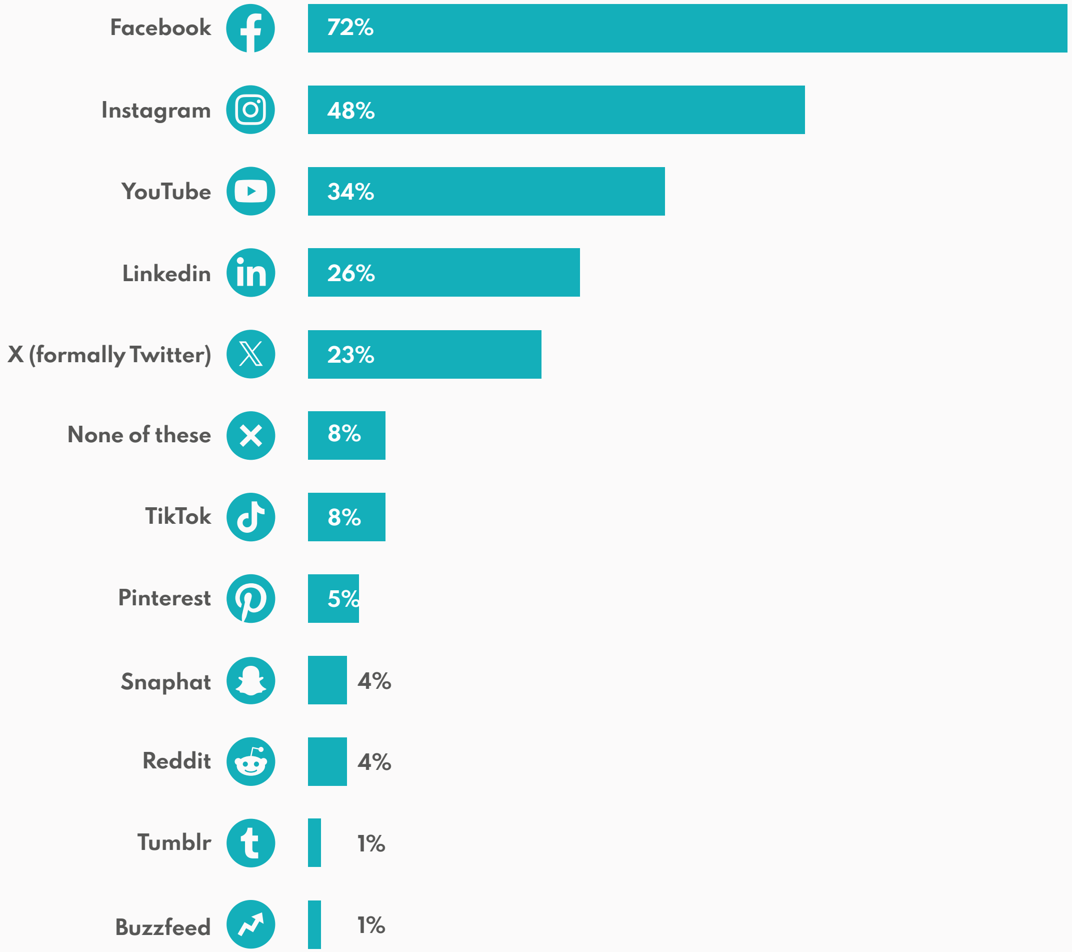
HOW OFTEN DO YOU POST ABOUT THE EVENTS YOU TAKE PART IN?



HOW DO YOU HEAR ABOUT THE EVENTS YOU TAKE PART IN?



WHICH OF THE FOLLOWING SOCIAL MEDIA PLATFORMS / FORUMS / SITES DO YOU USE OR CHECK ON A WEEKLY BASIS OR MORE?



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CHARITIES

More than a quarter of event participants we spoke to undertook some fundraising as part of participating in an event. We estimate that 7% of event participants' primary motivation for entering an event was to support a charity.

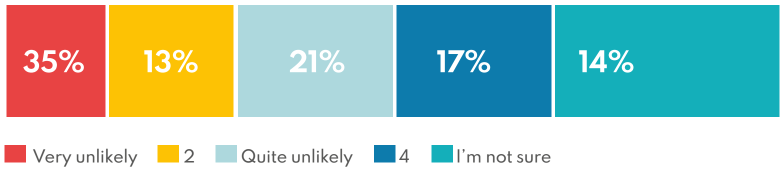
It is clear from the data that both event organisers and charities benefit from their relationship.

Events benefit through the recruitment of additional participants who are not predominantly motivated by fitness or experience and charities through events as a tool for acquiring new supporters.

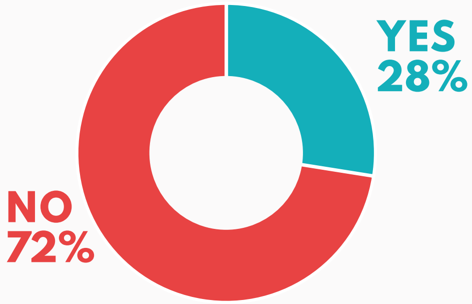
Of those we spoke to who did fundraise, almost one third 32% were fundraising for a specific charity for the first time and almost half, 49% were very or quite likely to fundraise for that charity again.

As an aside, given the difficulties some charities face in recruiting male fundraisers it is interesting to note that while women over index here as fundraisers, there was little or no gender variance in future likelihood to fundraise, suggesting again the potential of events as a valuable acquisition tool for charities.

HOW LIKELY ARE YOU TO FUNDRAISE FOR A CHARITY AS PART OF THE NEXT EVENT YOU TAKE PART IN?

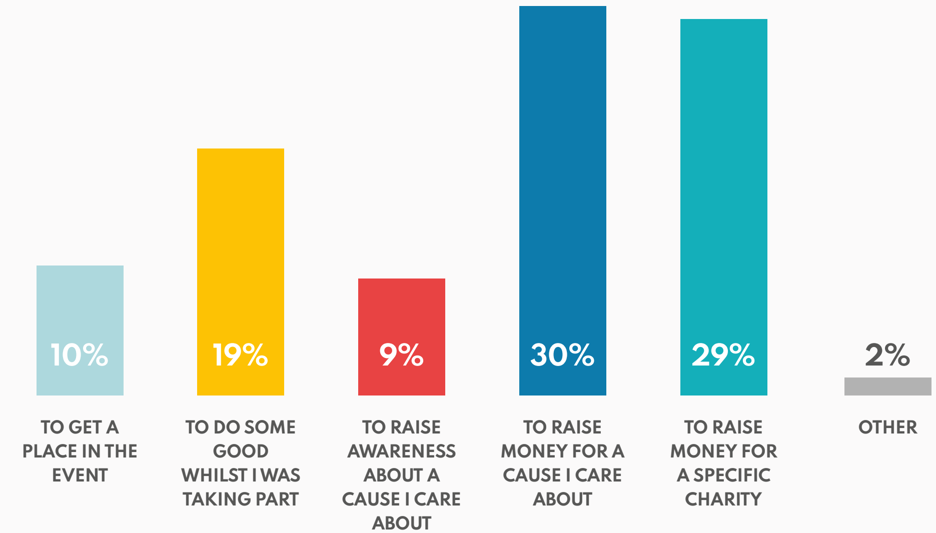


DID YOU FUNDRAISE FOR A CHARITY AS PART OF THE LAST MASS PARTICIPATION EVENT YOU TOOK PART IN?



HAD YOU FUNDRAISED FOR THE CHARITY PREVIOUSLY?

WHAT WAS THE MAIN REASON YOU DECIDED TO FUNDRAISE FOR THIS CHARITY AS PART OF THE LAST EVENT YOU TOOK PART IN?



FINAL THOUGHTS

After some dark days for the mass participation events industry since 2020, the data in this report suggests that while there are challenges ahead there is also cause for optimism with increasing levels of participation and new audiences being attracted to events.

These new and younger audiences may have different expectations of events and motivations for signing up, but if as our data suggests, the longer people take part in events, the more events they tend to take part in. If we can keep these audiences, engaged and excited about the experience events offer then their impact should continue to grow.

What is clear for us in this report is that mass participation events don't exist in a vacuum. Initiatives like Couch to 5k and others that get people active appear to have been successful in breaking down the fitness barrier to event entry that exists for many. If this flow through to events is to continue then initiatives like this need to flourish and there may be opportunities to think about initiatives with the potential to break these barriers down for activities other than running.

However, to drive the best possible growth in participation we need to address not just the flow of new participants into events, but also reduce the rate of people falling out of event participation along the way. To achieve this, we need to ensure people stay fit enough to take part, that events continue to evolve and give participants what they need in terms of value, and critically to protect against competition for attention and spend from other industries. Staying focused on communicating that the best mass participation events deliver experiences that can't be bought anywhere else is also critical.

If we can achieve that, then the future looks a lot brighter than the last 3 years.

WHAT NEXT FOR 2024?

Our ambition for The Pulse Report is to track changes in attitudes and behaviours of event participants, spot emerging trends, and identify opportunities to increase participation, building up a consistent pool of accessible data across multiple years.

We believe we're now the biggest survey of our kind in the UK, but to become a more useful cross industry resource and to better understand and build more insight around smaller segments of the audience and those disadvantaged or less well served in their communities, we need to grow the number or people we speak to each year.

If you are an event organiser, brand, charity, agency or media owner with an interest in seeing more people taking part in more mass participation events more often, we want to speak to you, so please get in touch.

OUR PARTNERS

This report is a collaborative effort and would not be possible without the efforts of our partners in sharing and promoting the survey to their customers, participants and audiences. Thank you.

Find a Race | Human Race | London Landmarks Half Marathon | Run Mummy Run
Running Industry Alliance | the great run company | realbuzz | ChampionChip
Ourea Events | World's Sports Group | race nation | Jane Tomlinson's Run For All

ABOUT MASSIVE

At massive we work in partnership with our clients to create, develop and deliver live event experiences that make a difference.

We've managed sponsorship activations for global brands, worked on the UK's most successful fundraising events and delivered the logistics, branding, wayfinding and staffing support for some of the world's biggest events.

METHODOLOGY

Our survey was in field for 4 weeks during October and November 2023 and we received 2,922 responses. We recruited participants directly and through our partner's mailing lists. For the purpose of this survey, we considered an 'event participant' to be anyone who had taken part in "an organised event that is open to all and involves physical activity like running, walking, cycling etc" at any point in the last 5 years. When asking respondents about number of events taken part in in 2023 we specified only those with a paid entry and specifically asked respondents not to include number of times they had taken part in regular free events such as parkrun.

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