

First Annual

RunSignUp Registration Trends



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Purpose

The endurance event industry has been growing for the majority of the last two decades and yet there is very limited trend data available to race directors and industry professionals. Running USA puts together comprehensive annual reports on the number and demographics of race finishers across the country; however, due to the increasing number of events without finishers and the limitations on data that Running USA can access, there remain a number of trends that are not analyzed. Some of the outstanding questions include:

- Are races growing?
- When do runners sign up?
- When do races happen?
- What is the best day for an event?
- What are gender and age trends?
- How effective are pricing strategies?
- How effective are marketing promotions?
- How can races maximize donations?
- How much revenue do add-ons and store items generate?
- Where (on the web) do runners come from?
- How many participants sign up on mobile?

RunSignUp has collaborated with <u>Running USA</u> and <u>Peter Abraham</u> and mined the RunSignUp registration data from the past two years to find benchmarks and trends that the endurance industry can learn from.

This data is based on RunSignUp registration and result data. The following are totals from all events with more than two people registered, including both participants registering online and imported registrations. For the purpose of this study, a race with multiple distances, such as a 5K and a 10K, is counted as two events.

Event Type	# of Events (2015)	# of Events (2016)	# Registrations (2015)	# Registrations (2016)
Overall	21,150	31,357	3,560,588	5,241,503
5K and less	12,382	17,766	1,930,061	2,820,749
10K and less	1957	3,187	352,227	558,261
Half Marathon and less	997	1438	334,483	524,492
Marathon and less	424	655	66,547	122,928
Ultra	310	497	32,484	44,022
Triathlon	464	711	34,166	62,653
Unknown	4,616	7,103	810,620	1,108,398

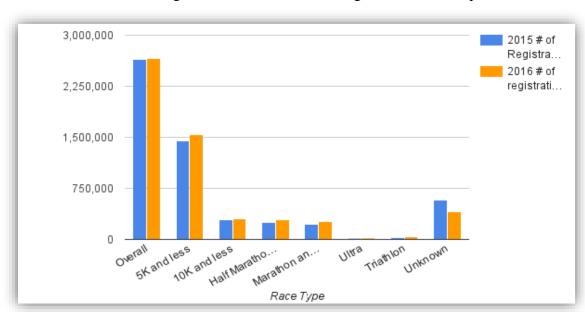
In the future, we hope other registration companies will provide similar data that can be aggregated to arrive at an even better understanding of industry trends. This first year effort is worthwhile as there is statistically significant volume to provide some interesting insights.

We welcome further feedback - please direct suggestions to Johanna Goode - johanna@runsignup.com.

Are Races Growing?

Overall Race Growth

Contrary to public perception, races on RunSignUp *did* grow slightly overall in 2016. For races that used RunSignUp in 2015 and 2016, there was overall growth of 0.5%. Some of the growth at various distances was likely the result of races clarifying the definition of their race distance in the system (Unknown events has a large decrease from 2015 to 2016).



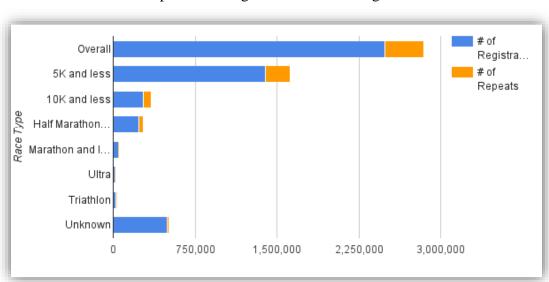
2015 # of Registrations and 2016 # of Registrations and Imports

	2015 # of	2016 # of registrations +		
Race Type	Registrations	Imports	Growth	# of Races
Overall	2,647,637	2,661,225	0.5%	15,415
5K and less	1,444,840	1,542,819	6.8%	8,941
10K and less	284,599	301,218	5.8%	1,544
Half Marathon and less	243,737	290,870	19.3%	726
Marathon and less	218,797	257,721	17.8%	645
Ultra	15,111	19,315	27.8%	233
Triathlon	26,742	38,714	44.8%	414

- 1. While overall growth is small and conventional wisdom is that race growth has stalled, it IS possible to grow your event!
- 2. Focus on promotional activities (see later in this report) and delivering a unique race day experience.

Repeat Participants

Across all race distances 15% of participants were repeats. The highest repeat ratio was the 10K category, with triathlons, ultras and marathons coming in at 8%, 8% and 14% respectively. This suggests that longer events require a larger commitment, create less loyalty and draw more once-in-a-lifetime participants.



of Repeats as a Segment of Overall Registrations

Repeat Participants			
	# of Registrations	# of Repeats	Repeat $\%$
Race Type			
Overall	2,485,367	363,074	15%
5K and less	1,394,920	228,478	16%
10K and less	274,097	72,125	26%
Half Marathon and less	234,422	39,943	17%
Marathon and less	46,604	6,100	13%
Ultra	14,527	1,227	8%
Triathlon	26,276	2,111	8%
Unknown	494,521	13,090	3%

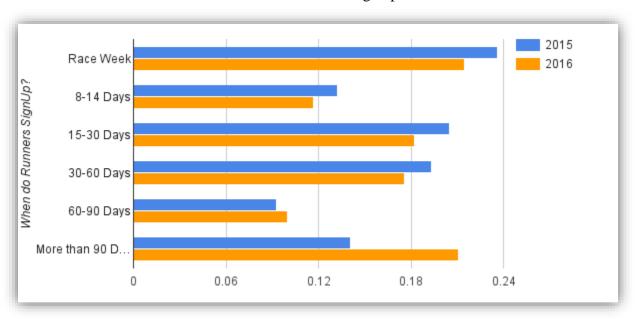
- 1. Don't neglect last year's participants in your marketing plan.
- 2. Attract new participants with promotional activities that reach outside your existing circle (e.g., new geographic areas or new demographic groups) and craft messages that present your event as a destination-worthy attraction.
- 3. Add shorter distances to long distance events to create more opportunities for local participants to repeat their participation.

When Do Runners SignUp?

How Far in Advance Do Participants Register?

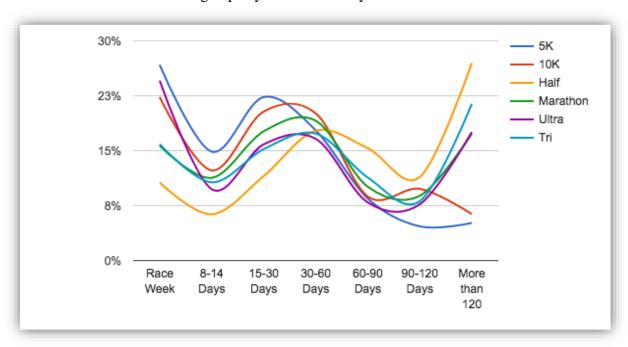
The most noticeable upshot from this section is that a lot more people signed up for races >90 days before the race in 2016 than 2015. This increase is likely an anomaly influenced by a number of races that use more advanced promotional activities like BlackLight Run, Night Nation, Bubble Run, The Glo Run, etc. Those runs - and their ability to get early commitments from runners - provide some lessons for traditional events to learn from, as they demonstrate that there is ample opportunity for early registrants. On the flip side, keeping registration open through race week (and race morning) is also key to maximizing participation.

When do Runners SignUp?



When do Runners SignUp?	2015	2016
Race Week	23.6%	21.50%
8-14 Days	13.2%	11.70%
15-30 Days	20.5%	18.20%
30-60 Days	19.3%	17.60%
60-90 Days	9.3%	10.00%
More than 90 Days	14.1%	21.10%

We can also look at this data by race distance. Half Marathons stand out for their tendency to draw early registrations, and fewer race week registrations than any other distance. Shorter distances – 5K's and 10K's – are seeing significantly fewer early registrations, and tend not to spike in registration until the 60 day mark.



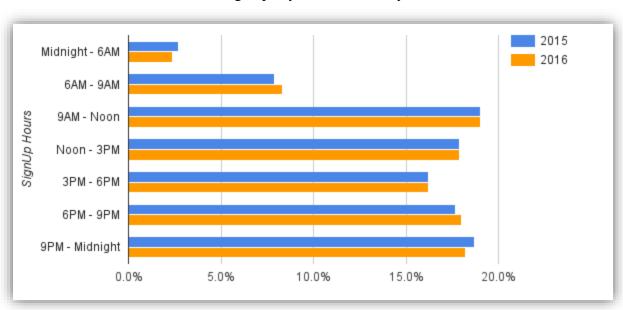
SignUps by Number of Days Before Race

	5K	10K	Half	Marathon	Ultra	Tri
Race Week	27%	22%	11%	16%	25%	16%
8-14 Days	15%	12%	6%	11%	10%	11%
15-30 Days	22%	20%	12%	18%	16%	15%
30-60 Days	18%	20%	18%	19%	17%	17%
60-90 Days	8%	9%	15%	10%	8%	11%
90-120 Days	5%	10%	11%	9%	8%	8%
More than 120	5%	6%	27%	17%	18%	21%

- 1. Open your race early.
- 2. Promote early and often.
- 3. Provide incentives to early registrants with strong "calls to action".
- 4. Keep online registration open throughout race week, and on race morning, to capture latedeciders.

Time of Day for Race SignUps:

With the prevalence of online registration, registering for races is a 24-hour a day business. You see spikes at lunchtime and in the evenings when people are home from work, with a noticeable drop from midnight to 9am, but it's clear that online registration is making it convenient for participants to register whenever they have a free moment.



SignUps by Hour of the Day

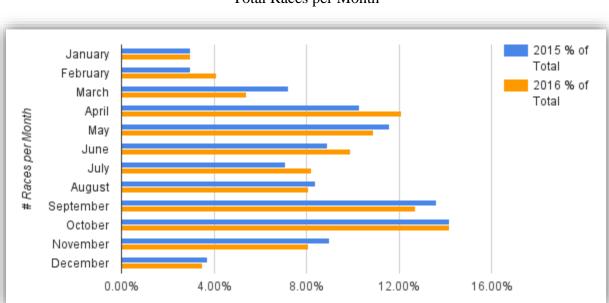
SignUp Hours	2015	2016
Midnight - 6AM	2.7%	2.4%
6AM - 9AM	7.9%	8.3%
9AM - Noon	19.0%	19.0%
Noon - 3PM	17.9%	17.9%
3PM - 6PM	16.2%	16.2%
6PM - 9PM	17.7%	18.0%
9PM - Midnight	18.7%	18.2%

- 1. Send email and run ads in the morning.
- 2. Run "midnight specials" from 6-12PM the biggest single hour is 8-9PM.
- 3. Make sure you're "open" 24/7 for **whenever** potential participants happen to be online.

What is the Best Day for an Event?

Distribution of Races by Month:

Predictably, more races are offered in the spring and fall than any other time of year. These months have easier logistics, less threat of weather cancellations, and a greater likelihood of PR's for your runners... but if you are introducing a new event in those months, you're also likely to see a lot of competition.

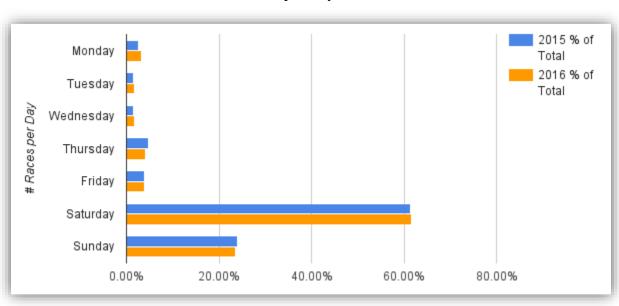


Total Races per Month

# Races per Month	2015 % of Total	2016 % of Total
January	3.00%	3.00%
February	3.00%	4.10%
March	7.20%	5.40%
April	10.30%	12.10%
May	11.60%	10.90%
June	8.90%	9.90%
July	7.10%	8.20%
August	8.40%	8.10%
September	13.60%	12.70%
October	14.20%	14.20%
November	9.00%	8.10%
December	3.70%	3.50%

Distribution of Races by Day of the Week:

Unsurprisingly, the bulk of races are on weekends, but you will find a range throughout the week. Two types of events you're likely to see on a weekday: 1) Corporate team events drawing the local corporate community out after work, and 2) Running clubs or stores that offer an evening race series to keep their community engaged.



Total Races per Day of the Week

# Races per Day	2015 % of Total	2016 % of Total
Monday	2.70%	3.30%
Tuesday	1.60%	1.70%
Wednesday	1.50%	1.70%
Thursday	4.80%	4.00%
Friday	3.90%	3.90%
Saturday	61.50%	61.70%
Sunday	24.00%	23.60%

- 1. Be creative! Use challenging weather or an unusual day as a reason that your event is unique, instead of a handicap.
- 2. If you are preparing an event during prime race season, make sure you scour the race lists in nearby areas and prepare for any overlap in participant pools.

What do Races Charge?

Average Price by Distance

Average Prices have increased for Half Marathons and down, while decreasing for the longer events.

Race Type	2015 Average Price	2016 Average Price	Increase
5K	\$25.68	\$26.02	1.3%
10K	\$31.92	\$33.54	5.1%
Half Marathon	\$57.69	\$60.24	4.4%
Marathon	\$87.49	\$85.34	-2.5%
Ultra	\$102.42	\$98.95	-3.4%
Triathlon	\$90.09	\$87.59	-2.8%

Registration Price Increases

Generally, races are moving towards more price increases during registration. Longer distances tend to have more price increases, likely because they also have longer registration periods (see How Far in Advance Do Participants Register?).

Average # of Price Increases			
Race Type	2015	2016	% Increase
5K	0.7	0.7	0.0%
10K	0.9	0.8	-11.1%
Half Marathon	1.5	1.7	13.3%
Marathon	1.5	1.6	6.7%
Ultra	1.2	1.4	16.7%
Triathlon	1.7	1.9	11.8%

Price Increase Ranges

There is an average of \$7-30 in price difference from the lowest to highest price for races, with longer (thus more expensive) races seeing a greater spread in pricing.

Average Difference Between Min and Max Price			
Race Type	2015	2016	% Increase
5K	\$7.48	\$7.97	6.6%
10K	\$8.86	\$9.61	8.5%
Half Marathon	\$18.32	\$19.86	8.4%
Marathon	\$26.38	\$27.38	3.8%
Ultra	\$45.18	\$29.94	-33.7%
Triathlon	\$25.67	\$33.93	32.2%

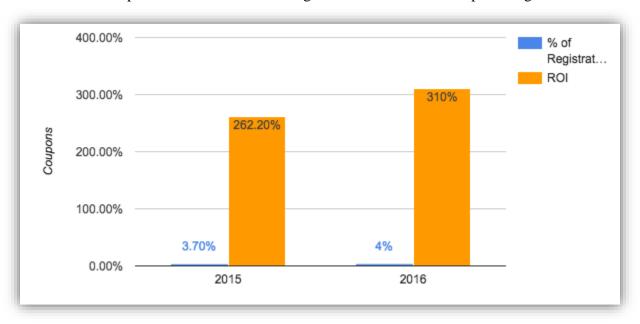
- 1. Use price increases as a promotional tool by creating a call to action for early registration.
- 2. For longer races, there is pricing pressure. Think of focusing more resources on having shorter events tied to your premier marathon events.
- 3. Add event switching for runners. This lets them signup early and know they can switch to a shorter event later if their training does not go as planned. It can also produce additional revenue if you add a switch cost.

Coupon Usage

Coupons impact the "real price" paid, but can also be a driver of registrations. Coupon use increased on a percent basis in 2016 to 4% of registrations from 3.7% in 2015. However, the average discount declined from \$13.03 to \$12.04, and resulted in an increase in Return on Investment (ROI) from 262% to 310%.

Coupons	Note: excludes 100% coupons					
	Number of Registrations using Coupons	% of Registrations using Coupons	Average Discount	Total Discounts	Net Revenue from Coupons	ROI
2015	163,954	3.70%	\$13.03	2137204	5604445	262.20%
2016	241,458	4%	\$12.04	\$2,907,418	\$9,012,947	310%

Coupons as Percent of Total Registrations & ROI for Coupon Usage



These numbers exclude about 120,000 100% off coupons. These were used for Groupon/Living Social type marketing purposes, as well as for sponsor and elite free entries.

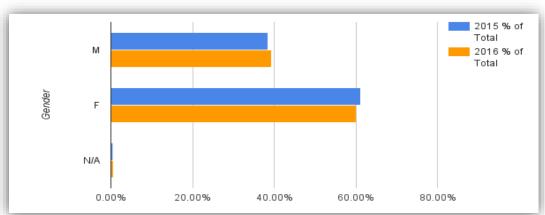
- 1. Use coupons as a call to action to sign up for a race.
- 2. Add coupons to your Referral Rewards Program to provide a "gift" a referrer can use to entice their friends to signup for your race.
- 3. Keep coupon generation judicious: you want people to feel like the coupon is a one-time opportunity to save money; if you have a new coupon every week, you lose some of the power of the call to action.

What are the Gender and Age Trends?

Gender Trends

RunSignUp's Gender trends mirror that of national studies: while there was a slight decrease in the gap between genders from 2015 to 2016, female dominance remains.

Gender as a Percent of Total Registrations (2015 vs 2016)

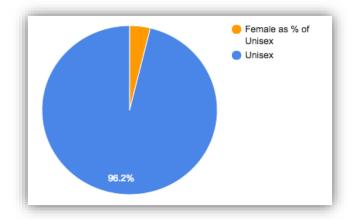


Gender	2015 % of Total	2016 % of Total	
M	38.40%	39.30%	
F	61.20%	60.20%	
N/A	0.40%	0.50%	

Giveaways by Gender

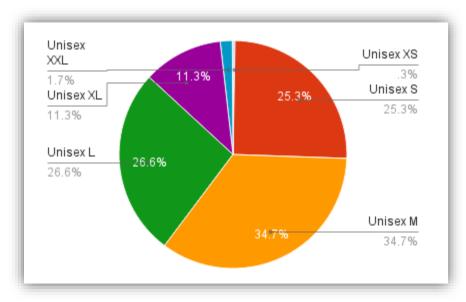
Giveaways are free items offered to all registrants; most commonly, events offer shirts as their giveaways. Most races offer Unisex shirts, with only 3.8% of 1.6 Million shirts classified as Female.

Female Shirt Giveaways vs Unisex Shirt Giveaways



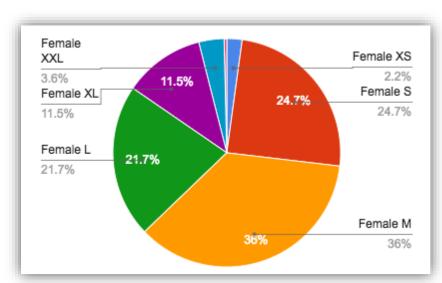
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While individual events will be unique, we also extracted data indicating the popularity of various sizes to help give events an idea what sizes to expect to sell. For Unisex Shirts, the size breakdown is:



Unisex Sizes Selected in 2016

For Female Shirts, the breakdown is:

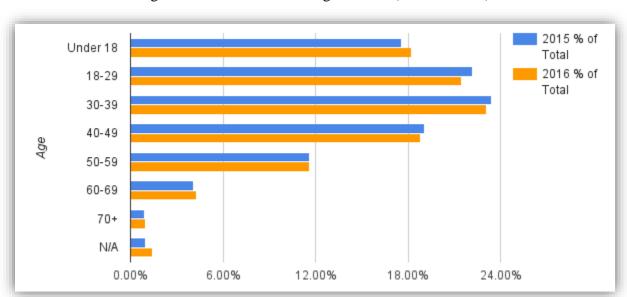


Female Sizes Selected in 2016

- 1. Since women make up 60% of participants, you should consider offering Female sizes and fits. Since few races are offering this, it can be a differentiator.
- 2. Runners run small! While you should always anticipate a range, small and medium sizes make up over 60% of the giveaway orders – whether they are unisex, or female only.

Age Trends

Millennials matter – but then, so do participants across a large age spectrum. We can only speculate, but believe that the uptick in registrations under 18 are likely due to an increase in family friendly, non-traditional events such as color or glow runs. Nevertheless, a majority of participants - 58.8% in 2016 - were 30+.



Age as a Percent of Total Registrations (2015 vs 2016)

Age	2015 % of Total	2016 % of Total
Under 18	17.60%	18.20%
18-29	22.20%	21.50%
30-39	23.40%	23.10%
40-49	19.10%	18.80%
50-59	11.60%	11.60%
60-69	4.10%	4.30%
70+	0.90%	1.00%
N/A	1.00%	1.40%

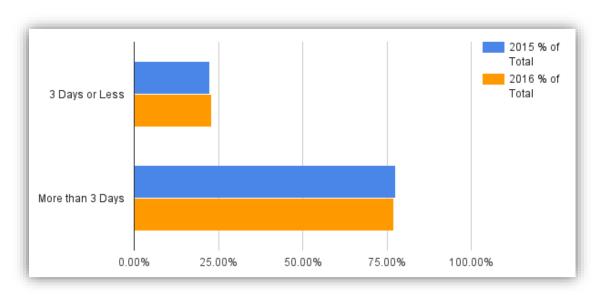
- 1. Remember to have reasons for various age groups to pick your race.
- 2. Think tech: 62.8% of runners are under 40, and are accustomed to slick technology at their fingers. Mobile registration, race day online registration, photos, and notifications are basic expectations for younger runners.
- 3. Encourage cross-generational participation by creating teams that family members from all age groups can join.

How Effective are Pricing Strategies?

Pricing Strategies - SignUps 3 Days Before Price Increase:

Nearly a quarter (23%) of all registrations take place within the 3 day periods prior to a price increase or registration closing date. This highlights the need for strong, time-based incentives to motivate runners to register.

Percent of SignUps 3 Days Prior to Price Increase or Registration Close



% of SignUps 3 Days Prior to Price Increase/Registration close		
	2015 % of Total	2016 % of Total
3 Days or Less	22.50%	23.00%
More than 3 Days	77.50%	77.00%

Takeaways:

Don't just HAVE price increases, take advantage of them. Make sure you are sending emails
to past participants who have not registered, as well as to current registrants (to encourage
them to invite their friends) and using social media to make runners aware of the
countdown on your current price.

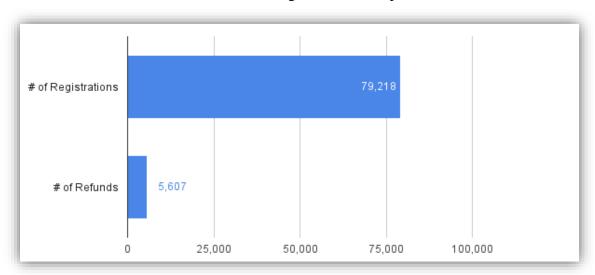
How Effective are Marketing Strategies?

Referrals

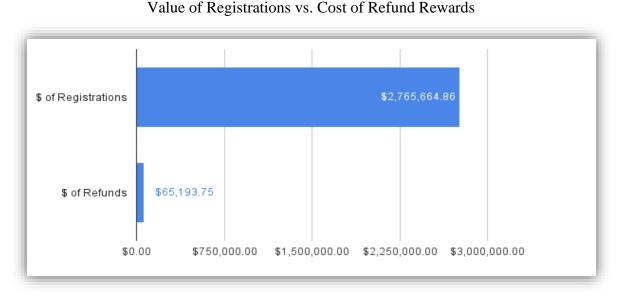
Referrals have proven to be an effective method for driving registrations. RunSignUp introduced Referral Rewards in February, 2016, where a race can initiate a refund if a participant gets additional people to signup for the race via a unique referral link.

This is probably THE MOST EFFECTIVE program you can run to increase participation in your race. The numbers are impressive, with about 7% of registrations coming from referrals (that pays for the processing fee!). The financial returns are also impressive: the CPA (Cost per Acquisition) is typically less than \$1, and the ROAS (Return on Ad Spend) typically 1,000%+:

Referral Rewards Results: # of Registrations Compared to # of Refunds



Yes, that is 14 new participants for each refund across all race programs since March 2016



Yes, that is a ROAS of over 4,200%. See if you can get over 200% on Facebook ads!

Before the release of Referral Rewards, referrals only contributed 1-2% of total registrations. Since it was introduced, races that have implemented it have seen referrals increase to ~7% of registrations coming from referrals.

Some races implement aggressive refund rewards - for example, referring 5 registrations to receive a refund equal to the entire cost of the original registration. This can be particularly beneficial because a participant with fewer than 5 referrals will be of no cost to the race, while still driving 1-4 friends to register. These programs can get 10-18% rates of adoption with CPA of around \$1.00 and ROI of 3,000%+. Here is an example from one large race series:

No. Referral Codes	21,888
No. Race Page Views	190,206
No. Sign Up Page Views	16,580
No. Completed Registration Transactions	9,073
No. Completed Registrations	10,897
Completed Registration Amounts	\$403,270.60
No. Referral Refunds	484
Estimated Referral Refund Amounts	\$11,487.00
Estimated ROI	\$391,783.60 (3,411%)
Estimated CPA	\$1.05

Takeaways:

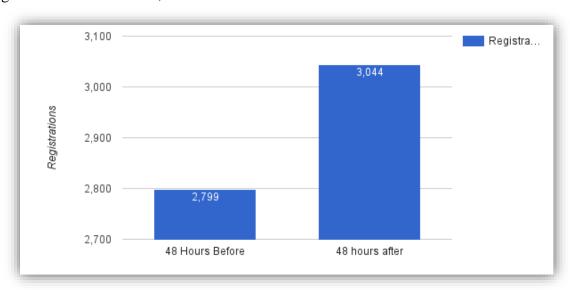
- 1. Implement Referral Rewards for an immediate impact on Registrations.
- 2. Set a high referral number, like 3 or 5 friends, and set a high refund like the entire price of registration.

RunSignUp

Email Marketing

We did an analysis of the impact of emails. In a sample of 50,000 emails sent in July - November, 2016, the number of registrations over the 48 hours after an email was sent increased by 9% as compared to the 48 hours before the email was sent, proving that emails do have an impact.

Registrations in Thousands, 48 Hours Before an Email Send vs. 48 Hours After an Email Send



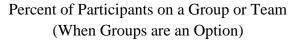
Email	
	Registrations in Thousands
48 Hours Before	2,799
48 hours after	3,044
Total	5,843
Increase	9%

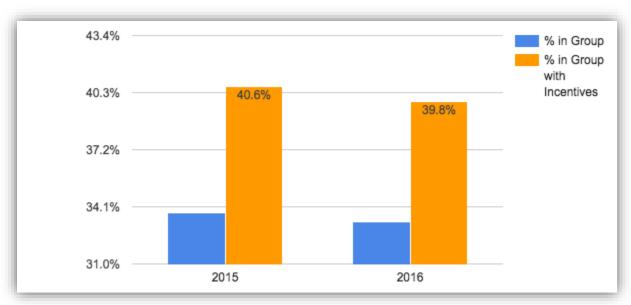
- 1. Send Emails especially ones with a "Call to Action" to SignUp now with some reason behind it either price changes, special celebrations, etc.
- 2. Setup Automated Emails promote price increases, Holiday Specials or "Last Chance" pricing for you.

Groups & Teams

Adding Groups or Teams to your race takes advantage of running communities to grow events via viral adoption. It also meets an increasing demand for races to be social, shared experiences. Many races successfully introduce Social Groups with no real prizes or meaning or benefit beyond added camaraderie. However, other events will encourage larger, more engaged groups by giving prizes to the largest teams, or automatically offering lower prices to larger teams.

Of the races that had teams, we saw over 33% of participants signup with a team rather than as an individual. When there were incentives for teams, that number increased to nearly 40%.





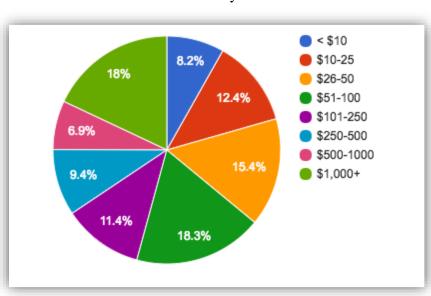
Groups & Teams				
	% in Group	% in Group with Incentives	Average Size	Average Size with Incentives
2015	33.8%	40.6%	5.3	6.5
2016	33.3%	39.8%	5.5	6.6

- 1. Offer Social Teams as a key part of your race.
- Provide incentives for teams either offer a discount/refund or a prize based on team size (creative idea we saw: a race gives the largest team a free tent to hang out in on race day).

How Do Races Maximize Donations?

Donation Amounts

Donation collection from 2016 suggests that events benefit from suggesting a wide range of potential donations. While donations of smaller amounts happen in significantly greater quantity, the spread of donation levels is broad, and there are donors committed to significant dollar amounts. In fact, the donation level that raised the second most (18% of total donations) was those that were \$1,000+, despite only 531 donors contributing at that level. It pays to seek out higher donations!

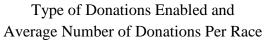


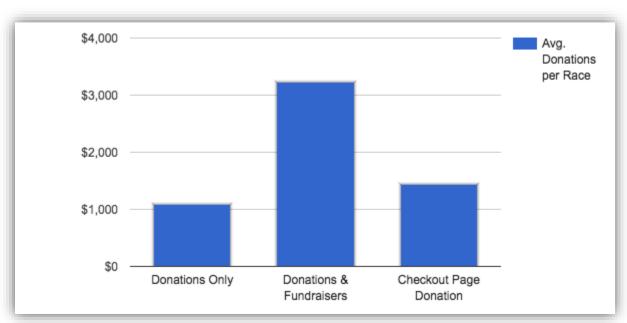
Value of Donations by Donation Level

Donation Amount	Number of Donations	Total Donations
< \$10	164,862	\$921,113
\$10-25	63,052	\$1,392,467
\$26-50	37,986	\$1,730,208
\$51-100	21,359	\$2,055,790
\$101-250	6,353	\$1,278,831
\$250-500	2,454	\$1,060,741
\$500-1000	872	\$780,569
\$1,000+	531	\$2,023,820

There are 3 major ways to get donations - simple donations, having fundraisers, or by having a "donate" checkbox on the checkout page. Across 9,455 races that had one of those options available, the results show that races with fundraisers raise the most money:

Types of Donations





	# of Races	Avg. Number of Donations per Race	Total Donations	Avg. Donations per Race	% of All Transactions (including Registrations)
Donations Only	7,663	37	\$8,315,172	\$1,085	7.7%
Donations & Fundraisers	1,537	59	\$4,974,516	\$3,236	4.6%
Checkout Page Donation	245	246	\$354,339	\$1,446	0.3%

Takeaways:

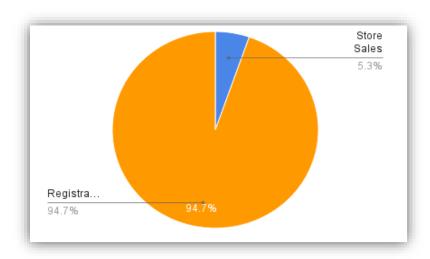
- 1. If you have an engaged community, get Fundraisers to help you raise money.
- 2. Add the checkbox for a donation to a charity even if you have main donations turned on.
- 3. Set some high level Donation Levels the second highest category of total funds raised is \$1,000+. You won't get it if you don't ask for it!

RunSignUp

How Much Revenue is Generated by Store Items?

A race store allows for retail purchases during *and* outside the registration path. For the 1,9,11 races who had an add-on option, the percentage of total sales value derived from add-ons grew from 4.4% in 2015 to 5.3% in 2016.

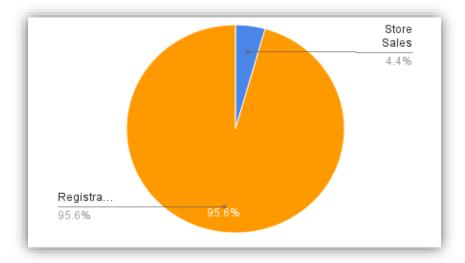
Store Revenue as a Percentage of Total 2016 Revenue



2015 Store Sales	
	2015 Revenue
Store Sales	\$1,932,837
Registrations	\$41,953,509

2016 Store Sales	
	Revenue
Store Sales	\$4,209,643
Registrations	\$74,680,457

Store Revenue as a Percentage of Total 2015 Revenue



Where (On the Web) Do Runners Come From?

In this section, we look at RunSignUp's overall web analytics for an overview of how participants find race websites and what devices they use. The data is based on reports from Google Analytics for September of 2015 and 2016. This chart shows the volume of traffic and \$ of transactions processed that were reported to Google Analytics (it does not capture all sessions and traffic, but the data is reported on this volume).

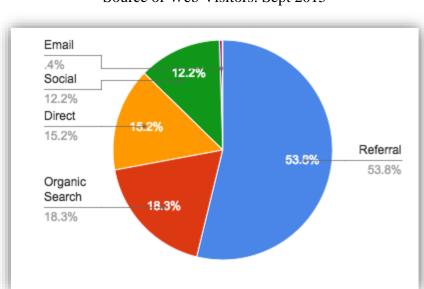
	Sessions	\$ Transactions
Sept. 2015	1,782,000	\$ 8.7M
Sept 2016	2,866,000	\$ 13.3M

Sources of Web Traffic

Referrals were the primary source of traffic to RunSignUp, representing either race calendars like RunningintheUSA.com (at 7.5%) or websites for races, timers, or race series (like <u>VTMTS.com</u> or <u>BlacklightRun.com</u>. Direct traffic is made up of runners who came directly to the race webpage or to the RunSignUp.com homepage.

The growth from 2015 to 2016 is in both Search (such as Google) and Social (like Facebook or Twitter). Search is still larger than Social, which might be somewhat explained by the high ranking of RunSignUp Race Websites in Google. With 36% of visitors coming from these two sources, they remain the best way for a race to attract visitors.

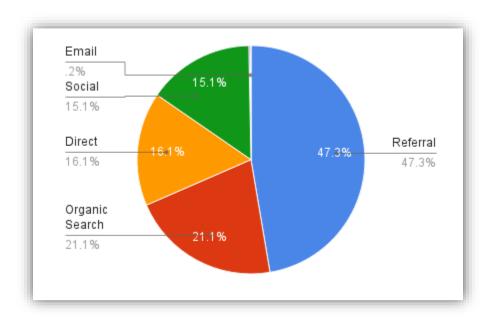
Note the low rates for email; this may be due to incorrect source tracking in Google Analytics and different email clients - for example a link on an email in a mobile phone pops the browser with a direct link.



Source of Web Visitors: Sept 2015

RunSignUp

Source of Web Visitors: 2015



Source	Sept. 2015	Sept. 2016
Referral	53%	47%
Organic Search	18%	21%
Direct	15%	16%
Social	12%	15%
Email	0.4%	0.2%
Paid Search	0.1%	0.1%

Social Value

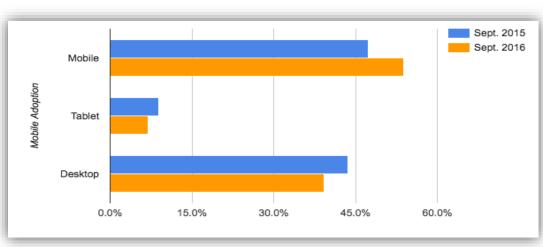
Google Analytics also tracks social interactions. These are 97% on Facebook, 1.6% on Twitter and 0.6% on Instagram as of September, 2016. The contribution to overall race revenue is relatively small, but growing:

Social Value	Sept. 2015	Sept. 2016
Contributed Social Conversions	6.2%	7.5%
Last Interaction Social Conversions	3.9%	4.1%

- 1. Make sure your event shows up on national and local race calendars contact local timers and running stores to see if they can list your event.
- 2. If you are not using a RunSignUp Website, study the basics of SEO (and make sure you're mobile friendly) to ensure you are showing up in google.

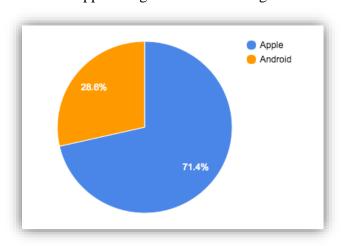
How Many Participants SignUp on Mobile?

It's no secret that mobile matters in all online interactions – even google rankings are now impacted by a website's mobile friendliness. The percentage of visitors to RunSignUp who view the site on a mobile phone or tablet now outranks the percentage who are on a traditional desktop (60.8% to 39.2%).



Mobile Adoption September 2015 vs September 2016

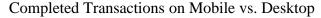
Those mobile visitors are predominantly coming from Apple devices, with Android devices making up 28.6% of the site visitors.

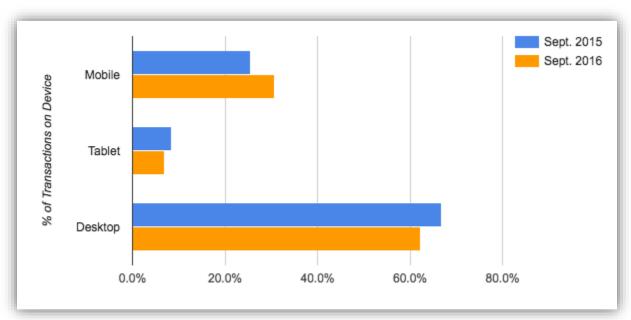


Apple Usage vs Android Usage

Mobile Adoption	Sept. 2015	Sept. 2016
Mobile	47.4%	53.8%
Tablet	8.9%	7.0%
Desktop	43.7%	39.2%
Apple	70%	70%
Android	28%	28%

While mobile traffic exceeds desktop traffic, the conversions on those devices is somewhat lower. However, it is interesting to note that the number of transactions completed on mobile is rising faster than the number of mobile users clicking on race websites. The improvement in conversion is due to both the increasing willingness of runners to signup on their mobile devices and the continued improvements in mobile technology.





% of Transactions on Device	Sept. 2015	Sept. 2016
Mobile	25.6%	30.7%
Tablet	8.5%	7.0%
Desktop	66.9%	62.2%
Apple	70%	72%
Android	25%	26%

Takeaways:

1. This may sound like a broken record...but your race website and registration site **must** be mobile friendly.

Conclusion

After years of growth, the Endurance Industry is looking for new ways to maintain momentum. Creative marketing options and an expansion beyond traditional races are key to preventing stagnation in today's market; this report is a launching point to build a holistic understanding of events. We believe that sharing data about the industry will help the *whole* industry, and look forward to years of building on this report and collaborating with other registration providers to create a long-term view of trends in endurance.