THE MASS PARTICIPATION PULSE 2025

January 2025

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WELCOME

TO THE THIRD EDITION OF THE MASS PARTICIPATION PULSE REPORT

Last year's report pointed towards 2024 being a strong year for event organisers, with 41% of our respondents planning to participate in more events. So, we're delighted to report that this has largely been the case, with significant growth seen across the industry with record ballot entries for events like the London Marathon and the Great North Run and substantial growth reported by event entry and fundraising platforms.

For a report that came about because of concerns about a slower-than-expected return to events post-pandemic, **It is particularly pleasing to see many of our partners, reporting event entry levels well beyond 2019 pre-pandemic levels.** This suggests that, as an industry, we are well and truly back on track and can start looking forward instead of back.

This year's report looks at many of the same metrics as previous reports but also aims to dig a little deeper into the **attitudes and behaviours of event participants** to understand; If the boom will continue? Who is taking part? And how event organisers can adapt and change what they do to sustain and grow the popularity of their mass participation events.

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KEY FINDINGS FROM THIS YEAR'S REPORT:

- Events overall and running events in particular, had a very positive year in 2024
- Event organisers are attracting new audiences to take part in events, with over a quarter of people we spoke to having taken up events since 2022
- These new event audiences are younger, well-educated, relatively wealthy and more likely to be female than existing event participants
- People are spending more on events and apparel, travelling further to take part and signing up earlier than at any time since the pandemic
- Event participants are more positive about the events they take part in with a doubling in the percentage who feel that events offer good value for money
- Participants put more value on the basics of toilet provision, clear signage and ease of getting to and from event sites than almost any other element of the event experience
- Social media and recommendations from friends and family are now the most common way for people to hear about events.
- Sentiment around finances for the year is more positive than we have seen at any point in the last 3 years but cost of living pressures have not gone away for many
- The year ahead is looking positive with 32% of respondents expecting to increase the number of events they plan to take part in this year

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WHO ARE OUR PARTICIPANTS?

This year's report pulls together insight from over 11,000 responses to our survey. As in previous years we had responses from across the UK and Ireland.

Our respondents were split 50/50 between males and females with an average age of 44.

WHAT IS CHANGING?

In 2023, we reported the emergence of a new generation of mass participation event participants, and based on our results for 2024, this trend seems to be accelerating. We're seeing more people who are new to taking part in events. With the percentage of people who have started taking part in events in the last 2 years or less, more than doubling since our last report.

HOW LONG HAVE YOU BEEN DOING THIS TYPE OF EXERCISE / EVENT?

44%	More than 10 years
30%	6-10 years
20%	1-2 years
6%	Less than a year

MORE PEOPLE ARE NEW TO THEIR SPORT

Last year, we found that only 9% of respondents had been running, swimming, or cycling for two years or less. This year, more than a quarter (26%) had taken up their sport in the last two years.

THESE NEW PARTICIPANTS ARE YOUNGER

We've seen the average age of respondents fall from 49 to 44, driven by an influx of younger participants. Overall, under 35s made up almost one-third of responses.

This is also being seen by event entry platforms. Our partners, Let's Do This saw event entries grow across all age groups, but they saw fastest growth in the 20–29 year age group driving down the average age of an event participant on the platform.

MORE LIKELY TO BE FEMALE

Participants who identified as female made up almost two-thirds (65%) of our under-35s, meaning the average age of the female event participants we spoke to was six years lower than the average age for those identifying as men (41 vs. 47). Additionally, 32% of all our female respondents had been taking part in events for less than two years, compared to only 20% of men.

ARE WELL-EDUCATED, HIGH EARNERS

As in previous years, we see that events in general, and running specifically, attract people with higher-than-average levels of household income, with 76% reporting income levels above the UK median and 23% with household incomes above £100K.

As a group, they also rank higher than the UK average for having a degree-level qualification, with 78% of females having a degree or higher qualification versus 64% of men.

PARTICIPANT BEHAVIOURS

People are taking part in the same number of events as 2019.

This year saw the average number of events people reported participating in stay level at 5.

This suggests that most of the growth in the events market we are seeing is being driven by new participants and that these people can be influenced to take part in more events each year if we can keep them engaged.

RUNNING STILL RULES

As in the last two years, most of our respondents are runners, (79%), including trail runners, with almost half (43%) reporting half marathons as their favoured distance.

Whilst we have less data from other sports, it appears that cycling and triathlon remain more popular with men than women, who are also overrepresented in marathons and even more so at ultra distances. However, the work of our partners such as Threshold Sports and others to break down these barriers does seem to be having an effect on these numbers.

70%	**Running**
9%	Trail running
9%	Road cycling
7%	Triathlon
2%	Swimming
1%	Off road cycling
1%	Mud obstacle
1%	Vitual events / challenges

HOW MANY MASS PARTICIPATION EVENTS DO YOU THINK YOU WILL HAVE PARTICIPATED IN BY THE END OF 2025?

MEDIAN NUMBER OF EVENTS

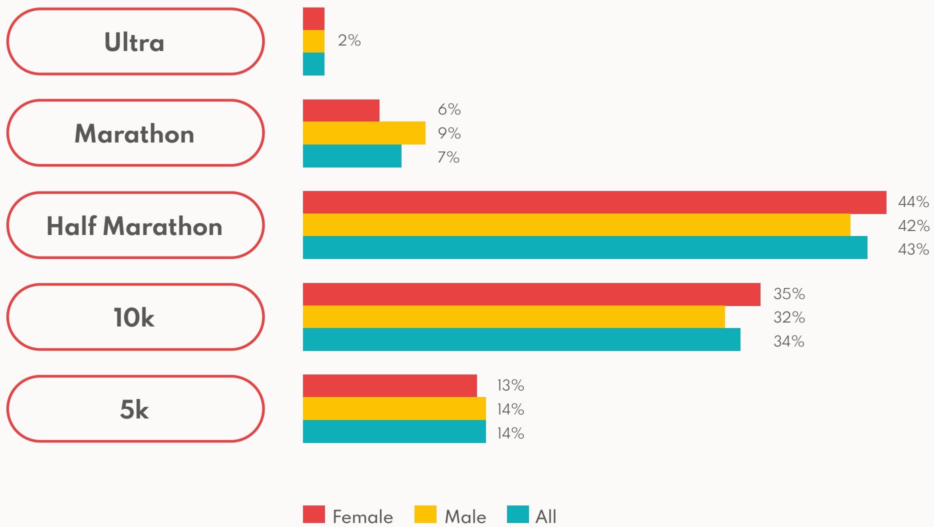
5 EVENTS IN 2024

5 EVENTS IN 2023

4 EVENTS IN 2022

5 EVENTS IN 2019

PREFERRED RUNNING DISTANCE



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PARTICIPANTS ARE SPENDING MORE AND TRAVELLING FURTHER

Compared to last year, we've seen a rise of almost 10% in the reported average spend on event entries. Men on average take part in slightly more events, so have a higher average spend, but the overall average spend in 2024 was £187.

After two years of slowing spend on fitness kit, both men and women spent more in 2024, with 18% spending more than £500 on kit and 20% spending between £200 and £295.

Our partners are also seeing people signing up for events earlier, on average up to 30 days sooner than in 2023 and travelling further to take part in events.

ROUGHLY **HOW MUCH DO YOU THINK YOU'LL HAVE SPENT** ON EVENT ENTRIES BY THE END OF THIS YEAR?

£187 **AVERAGE**

WHAT DO PARTICIPANTS THINK OF EVENTS?

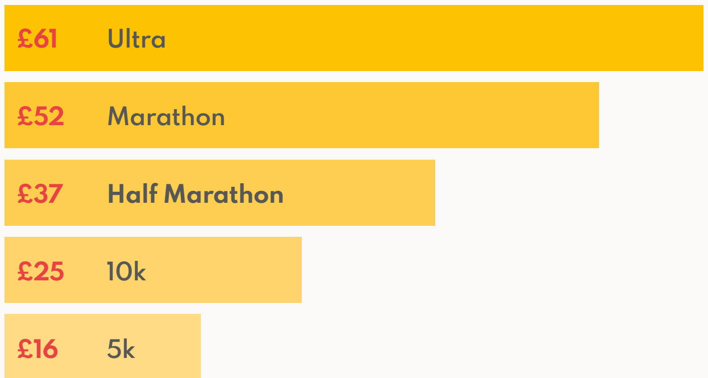
Looking at how participants view events, there are yet more positives for event organisers in our results.

An impressive 90% of participants think the events they take part in are well organised. People generally feel safe and secure when participating in events, with only 2% of men and 3% of women expressing any concerns about their safety at events.

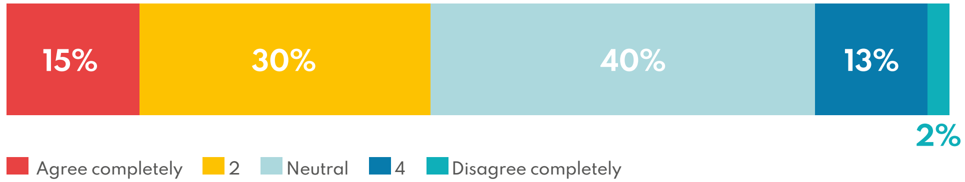
The perception of the value that events offer has also improved significantly since last year. Whether due to the higher quality of experience provided by organisers or other prices catching up, 45% of our respondents now think that events offer good value for money. Almost double the 23% who felt that way last year.

There is broad agreement around what a reasonable cost for an event is, but interesting to note that ‘fair’ prices are marginally higher for those who are newer to events.

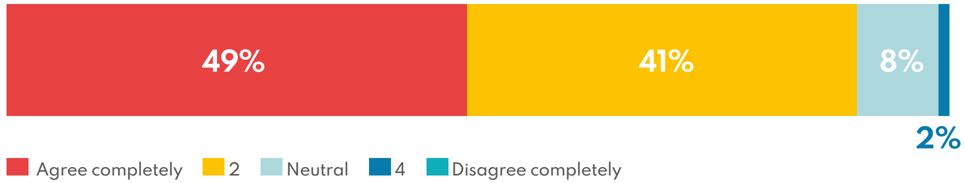
HOW MUCH DO YOU THINK IS A FAIR PRICE FOR THE FOLLOWING RUNNING EVENTS?



ARE EVENTS GOOD VALUE FOR MONEY?



THE EVENTS I TAKE PART IN ARE GENERALLY VERY WELL ORGANISED



I ALWAYS FEEL SAFE AND SECURE WHILE I’M TAKING PART IN EVENTS

SUSTAINABILITY

Last year, we looked in depth at attitudes towards sustainability and as part of that found a fairly even balance between those who thought event organisers were and weren't doing enough to make events more sustainable.

This year, we asked about progress towards being more sustainable, and a much larger number thought good progress was being made and only 7% disagreed. Though as before younger event participants (under 34) were most concerned about lack of progress being made, so this is an issue that will remain and increase in importance.

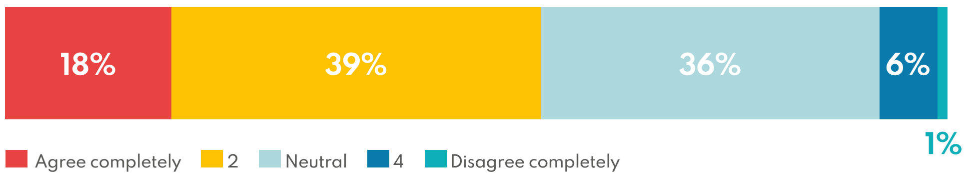
In 2023, the most popular initiative around sustainability with participants was to stop offering bottled water and provide refills (56% first choice of action). So, while it is disappointing that only 32% were in favour of event organisers no longer offering any disposable bottles of water, it is perhaps encouraging that less than half of people think this should continue.

Either way, this suggests that stopping the provision of bottled water is something that will need to be communicated carefully to event participants.

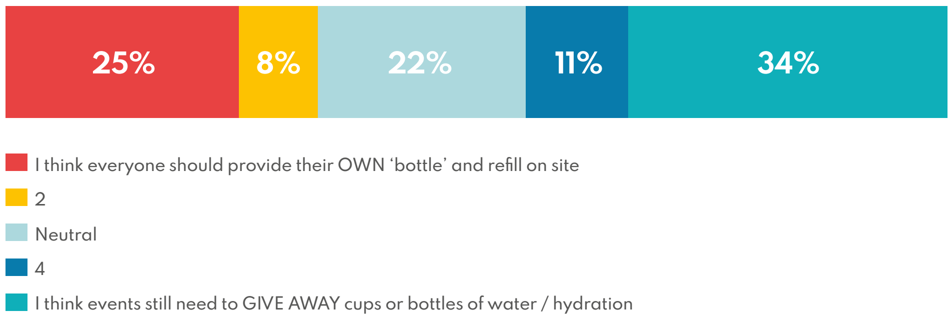
VIP TREATMENT

Asked by one of our partners to look at the issue of added extras, we found event participants are an egalitarian bunch, with only 11% supporting and 72% disagreeing (50% strongly so) with the idea of event organisers offering participants the opportunity to pay extra for VIP treatment at events. Though perhaps with 18% of those with a household income above £100K happy to consider this, it may be worth looking at for some organisers?

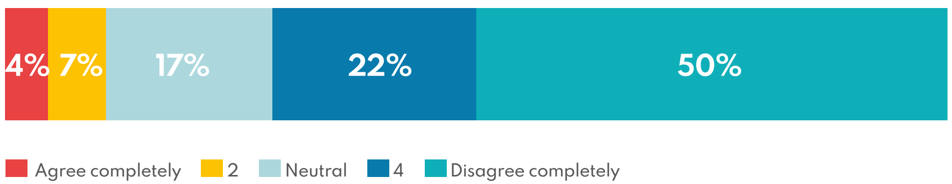
EVENT ORGANISERS ARE MAKING GOOD PROGRESS WHEN IT COMES TO MAKING EVENTS MORE SUSTAINABLE



EVENT PARTICIPANTS SHOULD REFILL THEIR OWN BOTTLES ONSITE



I WOULD PAY EXTRA FOR A VIP EXPERIENCE AT EVENTS



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HOW CAN WE GET PEOPLE TO TAKE PART IN MORE EVENTS?

CONFIDENCE

When we look at the biggest factors of those who were planning to do more events in 2025, confidence in levels of personal fitness and ability is the biggest single factor for all, but confidence in ability is an even bigger factor for female participants.

This suggests that, in addition to supporting prospective participants to achieve the right level of fitness to compete, event organisers could benefit from supporting participants and adapting the way they communicate about events to give people confidence that they are fit enough and capable of taking on the challenge of an event.

This is likely to be even more important if we want to move the new, younger, and female event participants being recruited now to take part in longer and more challenging events and distances.

COST OF LIVING CONCERNS HAVE **NOT GONE AWAY**

Whilst we previously found lack of fitness to be the main barrier to increased participation post-COVID, its relevance has almost halved since last year, reported as an issue by only 24% of participants in 2024 compared to 43% of participants in 2023.

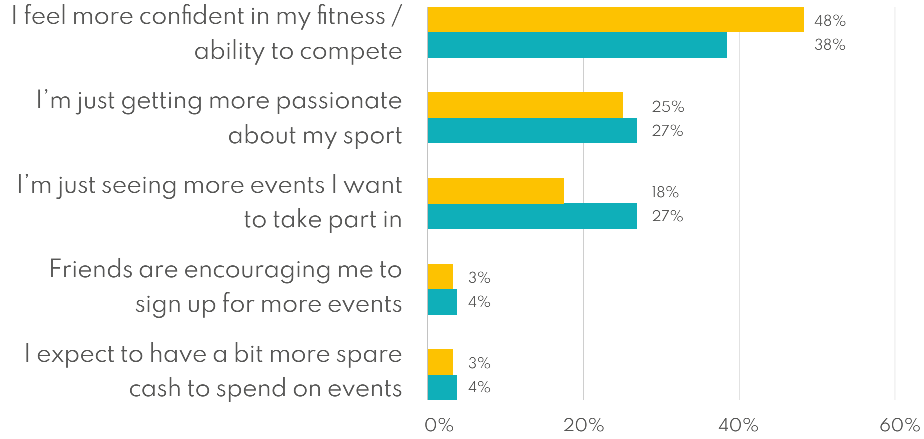
Having less disposable income is now the biggest single factor in people cutting back on the number of events they take part in. Of those participating in fewer events in 2024, 46% said this was due to having less spare cash.

TIME

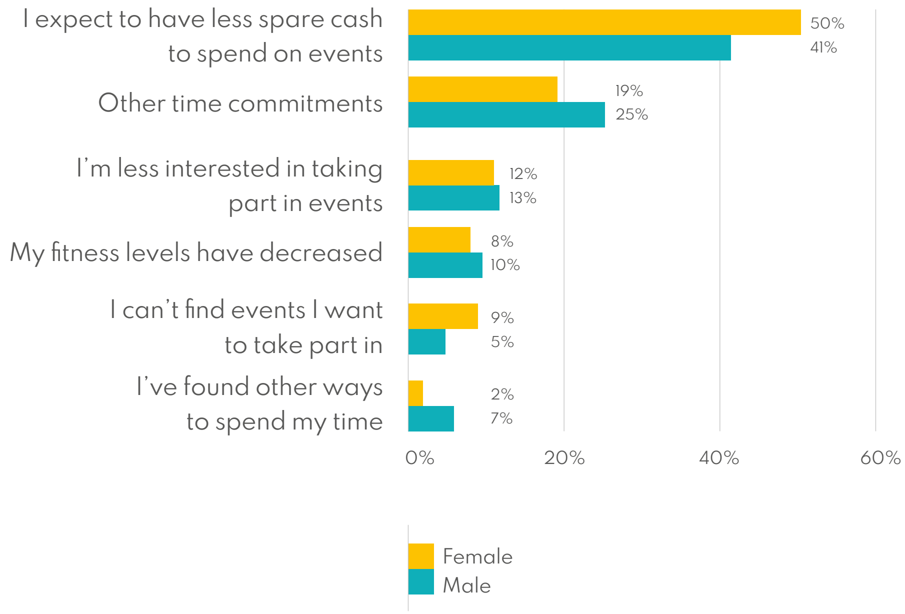
While finances are the biggest barrier to doing more events for older participants, for those under 35, the biggest barrier to doing more events is finding the time.

As a result for these participants the challenge is to fight for relevance and a place in their diaries as early as possible.

WHY DO YOU THINK YOU WILL TAKE PART IN MORE EVENTS?



WHY DO YOU THINK YOU WILL TAKE PART IN FEWER EVENTS?



REPEAT PARTICIPANTS

While the majority of participants search for new experiences and events each year, 30% of our respondents are happy to do the same event over multiple years.

Ensuring these participants sign up to events again is obviously the easiest way for organisers to secure participants entries for their events.

With most events not getting more than 10% of participants to sign up again, or anywhere near the 25% average figure for repeat sign-ups on the Let's Do This platform, it's clear that many organisers have an opportunity to increase sign-ups from their existing audience.

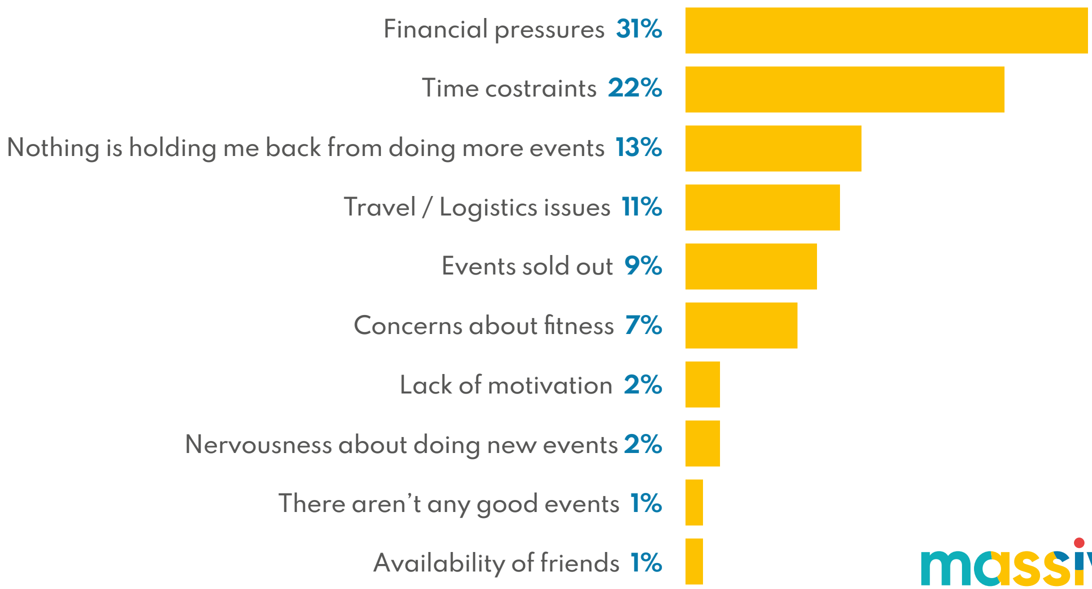
The top three factors most likely to get people to sign up again are the quality of the event experience, friends signing up, and the offer of discounts for repeat participants.

Last year, we reported that more than 34% of participants were motivated to take part in events for social reasons.

So, it is interesting to see the importance of friends taking part in events. For younger participants (those under 35) it was the one factor most likely to get them to sign up to events again. Suggesting that there may be lessons event organisers can take from successful running communities and online groups built around social interaction and connection. In addition, the fact that pressures around income have not gone away and people are attracted to the idea of discounts for repeat participants this may be one to consider for event organisers.

WHICH IF ANY OF THE FOLLOWING WOULD BE MOST LIKELY TO MAKE YOU TAKE PART IN THE SAME EVENT AGAIN?

WHAT, IF ANYTHING, IS THE MAIN THING HOLDING YOU BACK FROM DOING MORE EVENTS?



CHOOSING AND IMPROVING EVENTS

Over the last two years, there has been little change in the main factors participants consider when choosing which events to take part in: distance, date, price, and location are key. This year, we asked participants what is most important when they are at an event.

DISTANCE

DATE

PRICE

LOCATION

GET THE BASICS RIGHT

Surprisingly, beyond the atmosphere at the event, it is the practical elements such as **toilets**, **clear signage**, and **ease of getting to and from event sites** that participants value most highly.

Toilets are the most valued element of the event for almost all types of participants. Younger participants are the only group to rate event atmosphere above toilet provision, while women and men over 55 attach the most importance to good toilet provision.

RESPONDENTS ASKED TO SELECT UP TO 3 MOST IMPORTANT EVENT ELEMENTS

43%	Enough toilets
36%	Atmosphere on the route
33%	Easy to get to and from the event
33%	Clear directions & signage
25%	Getting a quality medal / reward
25%	Friendly marshals and volunteers
20%	Route not too crowded
17%	Good variety of hydration/fuel options
15%	A well organised baggage system
14%	Atmosphere at the finish
11%	Good public transport options
8%	Availability of food / drink after the event
7%	Being able to easily find friends and family after the race
6%	Length of time it take to cross the start line
2%	Entertainment after the race

HOW DO PARTICIPANTS HEAR ABOUT EVENTS?

Given the changing age profile of our respondents and the increasing importance of social connections, it is perhaps not surprising that social media has moved from being the third most common way to hear about events to being far and away the most popular method.

HOW DO YOU USUALLY HEAR ABOUT THE MASS PARTICIPATION EVENTS YOU TAKE PART IN?

53%	Social media
41%	Friends / family already taking part
40%	Through a charity
31%	TV / radio ads
27%	Event listings sites
23%	Google search engine
11%	Promotion at other events
5%	Email for event organiser
1%	Internet ads

Respondents asked to select up to three of their most frequently used sources.

THE ROLE OF CHARITIES FOR ORGANISERS

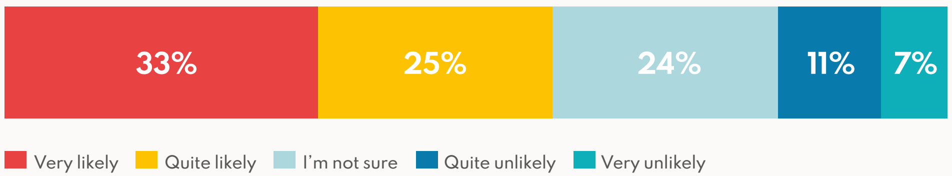
There appears to be a win-win relationship between charities and event organisers. Charities help to drive event recruitment as a significant way for participants to hear about events, and events support charities in recruiting new fundraisers.

Notably, 48% of those who fundraised for charities through participating in an event were supporting that charity for the first time and on average, participants raised £1,425, meaning that the event participants we spoke to for The Pulse raised well over £3 million in 2024.

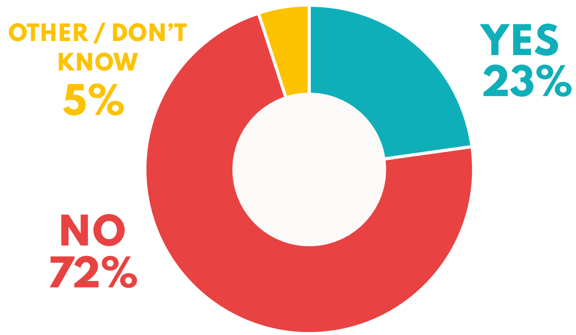
Clearly it is great news that 58% of fundraisers are likely to fundraise for a charity again, although there does seem to be an opportunity for charities to influence the 24% who are as yet undecided on whether to fundraise again and to better understand why almost 20% of fundraisers don't expect to support that charity again.

I FELT SUPPORTED AND THAT MY FUNDRAISING WAS APPRECIATED BY THE CHARITY

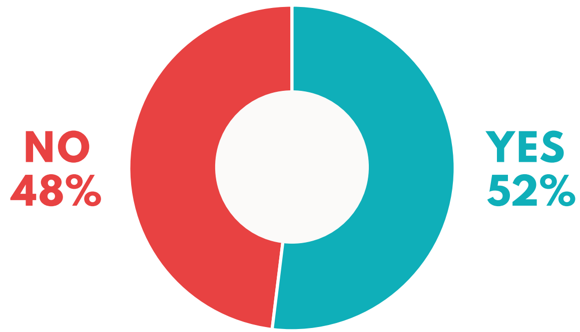
HOW LIKELY ARE YOU TO FUNDRAISE FOR A CHARITY AS PART OF THE NEXT EVENT YOU TAKE PART IN?



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



IF YES – HAD YOU FUNDRAISED FOR THE CHARITY PREVIOUSLY?



BRANDS

The relationship between fitness brands and events is obviously mutually beneficial, with each influencing and benefiting from the growing popularity of activities like running and cycling. Participants often place as much, if not more, importance on the brands they wear as on the events they participate in. This is reflected in spending habits, with 90% of participants spending at least £100 and 25% spending £400 annually or more on their gear.

As might be expected, newer event participants tend to spend more on average than those who are already established.

We asked again event participants to name their three favourite brands for both apparel and footwear (unprompted).

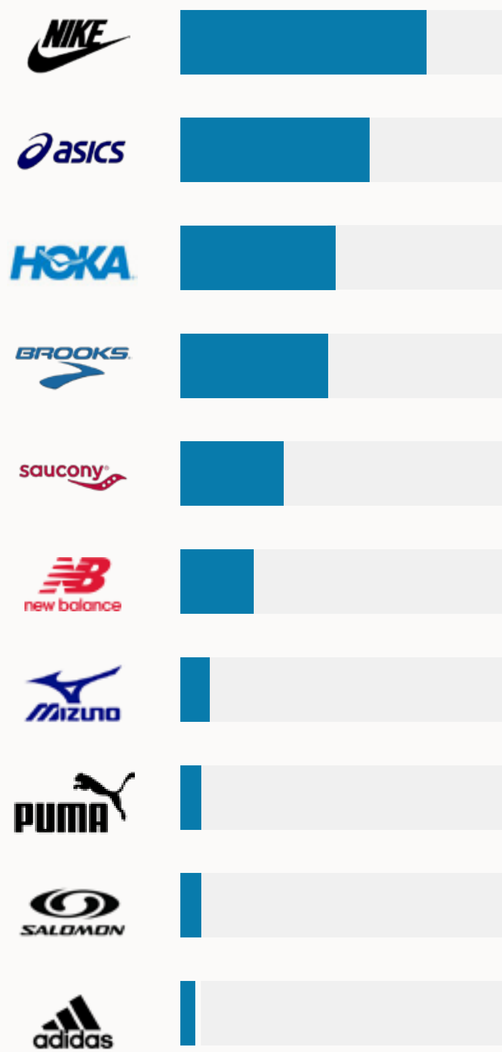
Nike remains the most popular brand for both footwear and apparel among both males and females. New audiences with different views of brands may be driving some changes in the makeup of our top 10 lists.

Sweaty Betty jumps to second place for apparel brands, which is particularly impressive given they are only relevant to 50% of our audience. Adidas has seen a decline in popularity, falling out of the top 10 from second place last year and ranking 10th for footwear in 2024.

Further down our top 10 lists, both Lululemon and Gymshark make their first appearances, with both being slightly more popular with females than males, in contrast to more established brands like Asics and Puma.

WHAT ARE YOUR THREE FAVOURITE BRANDS OF CLOTHING TO WEAR WHEN EXERCISING?

WHAT ARE YOUR THREE FAVOURITE BRANDS OF FOOTWEAR TO WEAR WHEN EXERCISING?



THE YEAR AHEAD

After a phenomenal year for events, with positive metrics almost across the board, what does the landscape for the year ahead look like?

In terms of available spend, things look hopeful. More people expect to see an increase in disposable income in 2025 than we saw last year (20% vs. 10% at the end of 2023), and fewer people expect to have less to spend (31% vs. 45% last year).

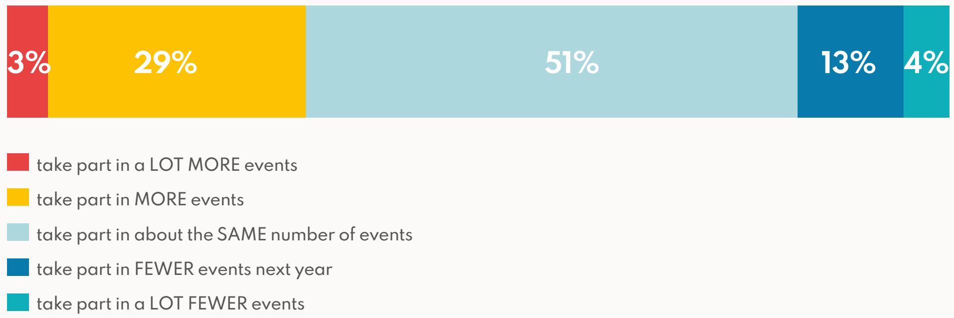
Reported intentions around event entry for 2025 are also good, with 32% of respondents expecting to increase the number of events they plan to take part in, and only 17% expecting to participate in fewer events.

This is backed up by data from our partners, with entries for 2025 already ahead of this point last year and a similar story around event fundraising pages.

However, it should be noted that sentiment is slightly less positive than it was at the end of 2023, with a decrease of 9% for those expecting to do more events and a 5% increase in those planning to do fewer events. This suggests that for those already taking part in events, growth may be beginning to slow a little.

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

THINKING ABOUT 2025, COMPARED TO THIS YEAR DO YOU THINK YOU WILL..



CONCLUSION

This year's Pulse paints a promising picture for 2025. Finally showing a robust recovery from the pandemic, with participation levels not only returning to but exceeding pre-pandemic figures. This resurgence is driven by a diverse and growing demographic of particularly younger and female participants, who are engaging more frequently and spending more on events and related activities.

Key insights to highlight are the importance of understanding and adapting to the evolving needs and preferences of participants. The increase in new participants, particularly those new to their sport, underscores the need for event organisers to provide supportive and inclusive environments. The demographic shifts towards younger and more female participants also suggests opportunities for targeted marketing and adapting the event experience to better suit their needs and preferences.

The positive perception of event organisation, safety, and value for money is a testament to the efforts of event organisers. However, the report also identifies areas for improvement, such as addressing barriers related to fitness confidence, social connections, and financial constraints. By focusing on these areas, organisers can further enhance participation rates and ensure sustained growth.

Looking ahead, the outlook for 2025 is optimistic, with many participants planning to increase their event involvement. However, the slight decrease in overall positive sentiment compared to last year suggests that growth may begin to stabilise. To maintain momentum, event organisers will need to focus on participant experience, tackle barriers to entry and continue to attract and retain the new generations of participant.

In conclusion, it has been a long time coming but the mass participation events industry is back on track, with significant opportunities for growth and development in the year and years ahead. By better understanding participant needs and trends; event organisers, brands, platforms and others can hopefully make the most of these opportunities and contribute to a vibrant and thriving industry.

GOOD LUCK.

OUR PARTNERS

A big thank you to our partners this year who have been an integral part of the Pulse's success so far.

We are always looking to grow this report with new partners and become established as the largest survey of its kind, enabling us to share more insight with the mass participation events community.

ABOUT MASSIVE

Massive specialise in supporting clients to design, develop and deliver mass, major and live outdoor events.

As well as audience insight and market research, we're trusted to deliver logistics, branding, wayfinding and staffing support for some of the world's biggest events, many of the UK's most successful fundraising events and manage sponsorship activations for global brands.

If you would like to know more please get in touch.

METHODOLOGY

Our survey was in field for 4 weeks during October and November 2024 and we received 11,449 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 2024 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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