IS MASS PARTICIPATION DEAD?

RICK JENNER
Participation showing positive signs
Sector appears to be in good health

Growth in race starts in last 3 years

- **RUNNING**: 10% (x42%)
- **CYCLING**: 6% (x36%)
- **TRIATHLON**: 66% (x23%)

Proportion of participants doing events

Source: Multisport Research 2014-2017
But there are pressing challenges
Have we reached an inflection point?
• Failed to anticipate change
• Struggled to adapt and catch up
• Challenged business models
• Belated focus on the customer
• Missed opportunities to lead and profit
1. DIGITAL INNOVATION
Virtual racing
Virtual challenges

The Races Are Virtual but the Running Is Real
Could virtual boost “traditional” events?

How you think virtual events will impact on your participation in traditionally organised sporting events in the future?

- **More**: 18%
- **No Difference**: 70%
- **Less**: 2%

Source: April 2019, sample: 431 adults taken part in or aware of virtual events.
2. CONSUMER BEHAVIOUR
### Changing sporting habits

- **Growth of doorstep sports**
- **Vulnerability of cycling and swimming**
- **Decline in team sports**
- **Thriving of niche sports**
- **Innovation in fitness**

**Source:** Sport England, Active Lives. Taken part at least twice in past 28 days.
Innovation in fitness
Live experiences thriving
<table>
<thead>
<tr>
<th>Event</th>
<th>Taken part in last year</th>
<th>Rating experience Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music concert or festival</td>
<td>38%</td>
<td>67%</td>
</tr>
<tr>
<td>Cultural event</td>
<td>36%</td>
<td>64%</td>
</tr>
<tr>
<td>Sports match</td>
<td>25%</td>
<td>48%</td>
</tr>
<tr>
<td>Participation sports event</td>
<td>7%</td>
<td>51%</td>
</tr>
<tr>
<td>esports / gaming</td>
<td>3%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Source: April 2019, sample: 3996 adults.
3. CONSUMER ENGAGEMENT
5 million UK users

40% of VMLM runners will share it on Strava
## Most Popular Foods on Strava in the UK

<table>
<thead>
<tr>
<th>Food</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coffee</td>
<td>40,724</td>
</tr>
<tr>
<td>Cake</td>
<td>37,882</td>
</tr>
<tr>
<td>Beer</td>
<td>33,581</td>
</tr>
<tr>
<td>Wine</td>
<td>10,870</td>
</tr>
<tr>
<td>Pizza</td>
<td>5,684</td>
</tr>
<tr>
<td>Chocolate</td>
<td>5,338</td>
</tr>
<tr>
<td>Eggs</td>
<td>5,065</td>
</tr>
<tr>
<td>Bacon</td>
<td>4,842</td>
</tr>
<tr>
<td>Sandwich</td>
<td>4,159</td>
</tr>
<tr>
<td>Burger</td>
<td>3,254</td>
</tr>
</tbody>
</table>
Storytelling
4. COMMERCIAL DEMANDS
Brands are story-tellers too
Brands need to prove ROO

- Bespoke to their business
- Must evidence impact
- Participation sport lags far behind
MONEY FOLLOWS THE AUDIENCE
For example…
Visa signs ground-breaking seven-year women's football deal with UEFA

Women's Super League: Barclays agree multi-million sponsorship deal

Boots inks FA deal to sponsor UK and Ireland national women's teams
IS MASS PARTICIPATION DEAD?

FAR FROM IT, BUT...
1. Understand and engage the audience
2. New models, new partnerships
3. Digital first with live experience
4. Work together for the benefit of all
THANK YOU

/Rime/light/ Sport

THE AGENCY OF THE ACTIVE WORLD

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