



European Athletics and the Mass Participation Event Market

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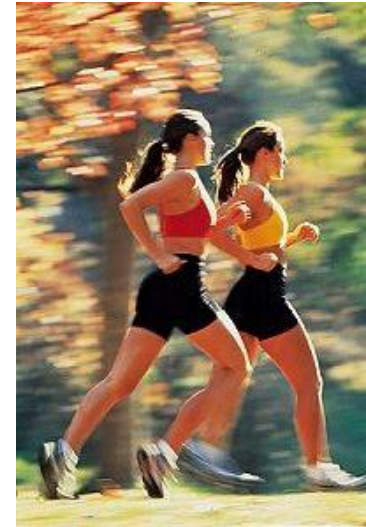
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Introduction



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Structure

1. Introduction
2. Methodology
3. Trends
4. Size of the market
5. Policy strategies
6. Conclusions



2. Methodology

- ✓ Secondary analysis of longitudinal datasets of Dutch population surveys (N=12,000; N=1,000) in 2005
- ✓ Stratified, disproportional survey of Dutch population (N=1,000 non-runners; N=1,300 runners) in 2005
- ✓ Post race surveys (N=54,778 participants of ten biggest road running events in the Netherlands) in 2008/2009
- ✓ In-depth interviews (N=25 participants in Utrecht Marathon)
- ✓ International-comparative analysis of marathon participation data
- ✓ Mass Participation Event Questionnaire (N=47 out of 50 member federations of European Athletics) in 2009



3. Trends: a flashback

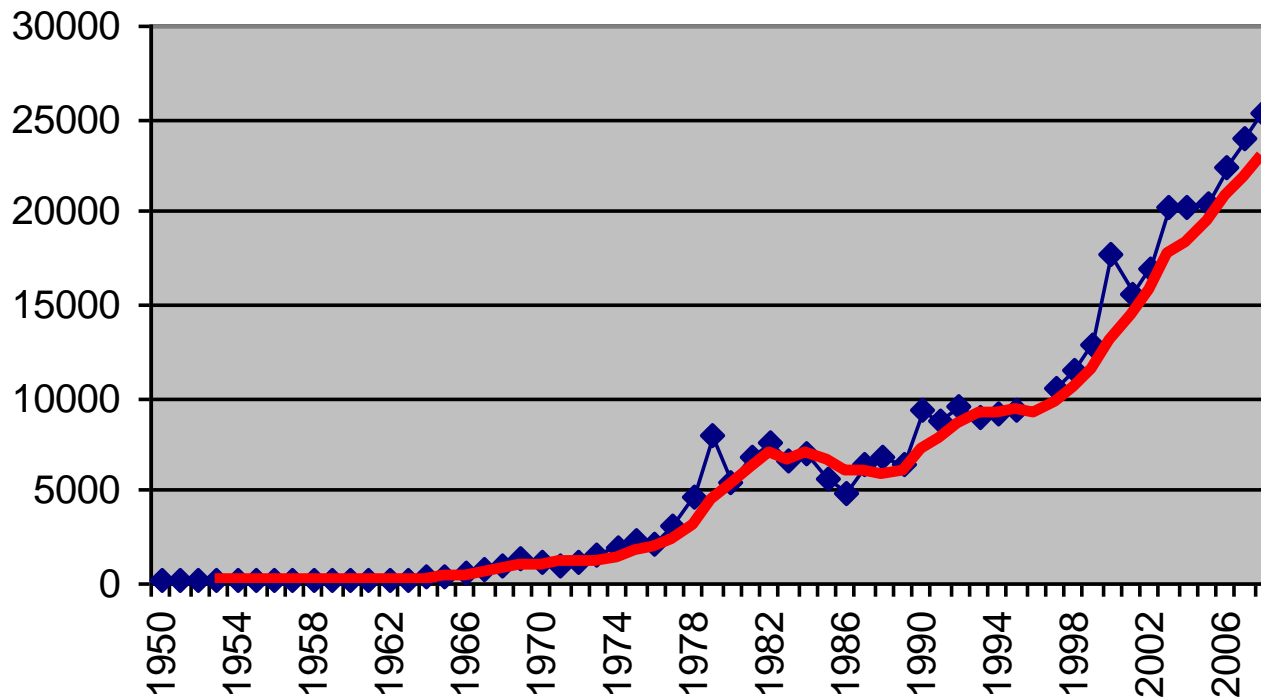
- Katherine Switzer, Boston, late 1960s



3. Trends: two waves of running (Boston)

Entrants, Boston Marathon, 1950-2008
(excl the centennial race of 1996 with 38,708 participants)

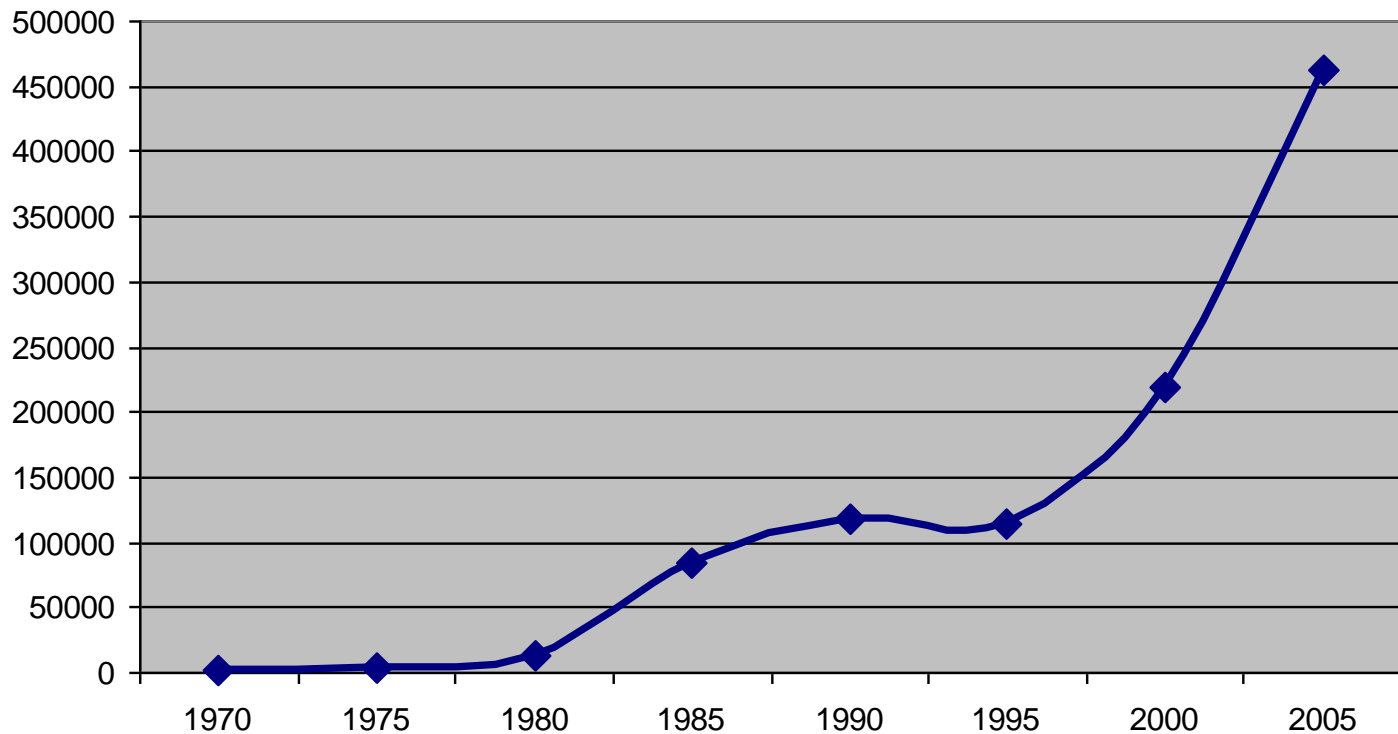
Source: www.bostonmarathon.org



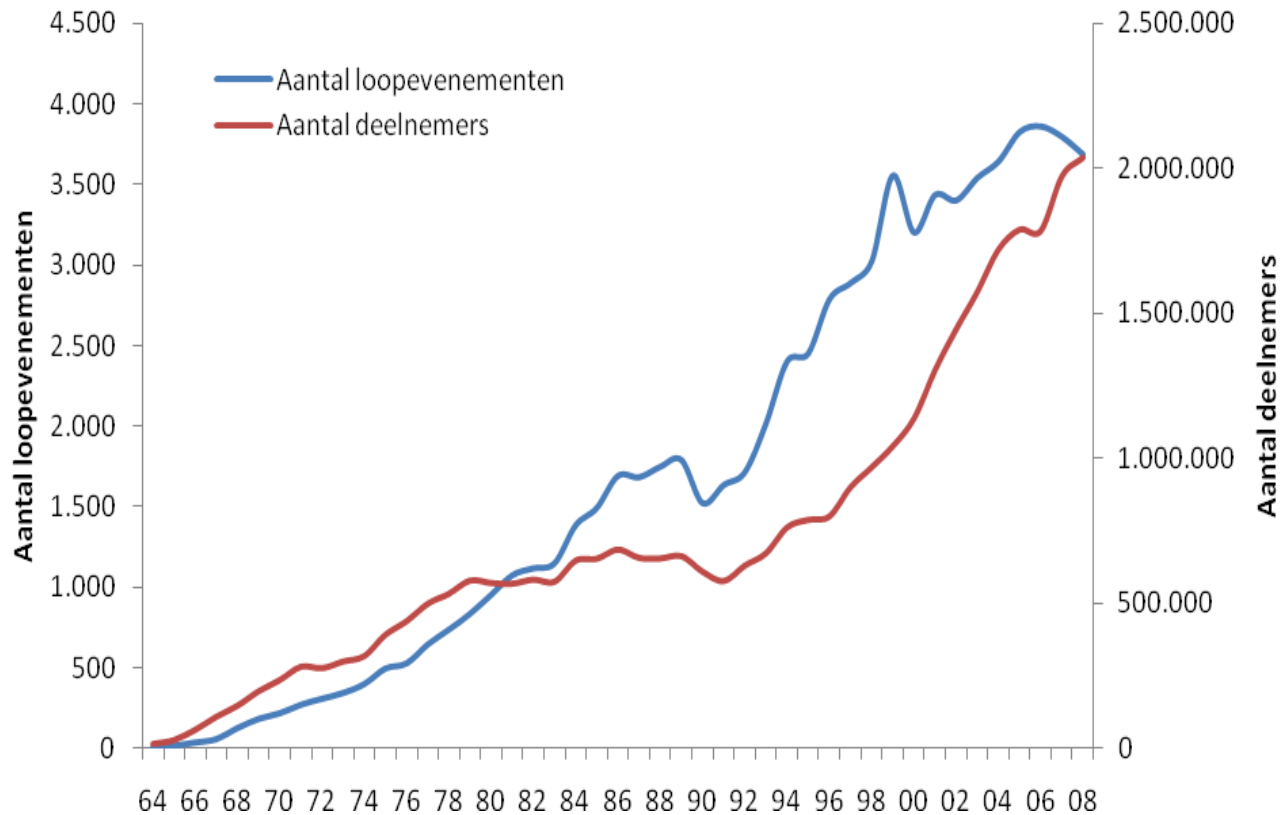
3. Trends: two waves of running Europe

Marathon finishers in Europe, 1970-2005

Source: calculation based on www.arrs.net (Scheerder & Van Bottenburg 2009)



3. Trends: two waves of running Germany

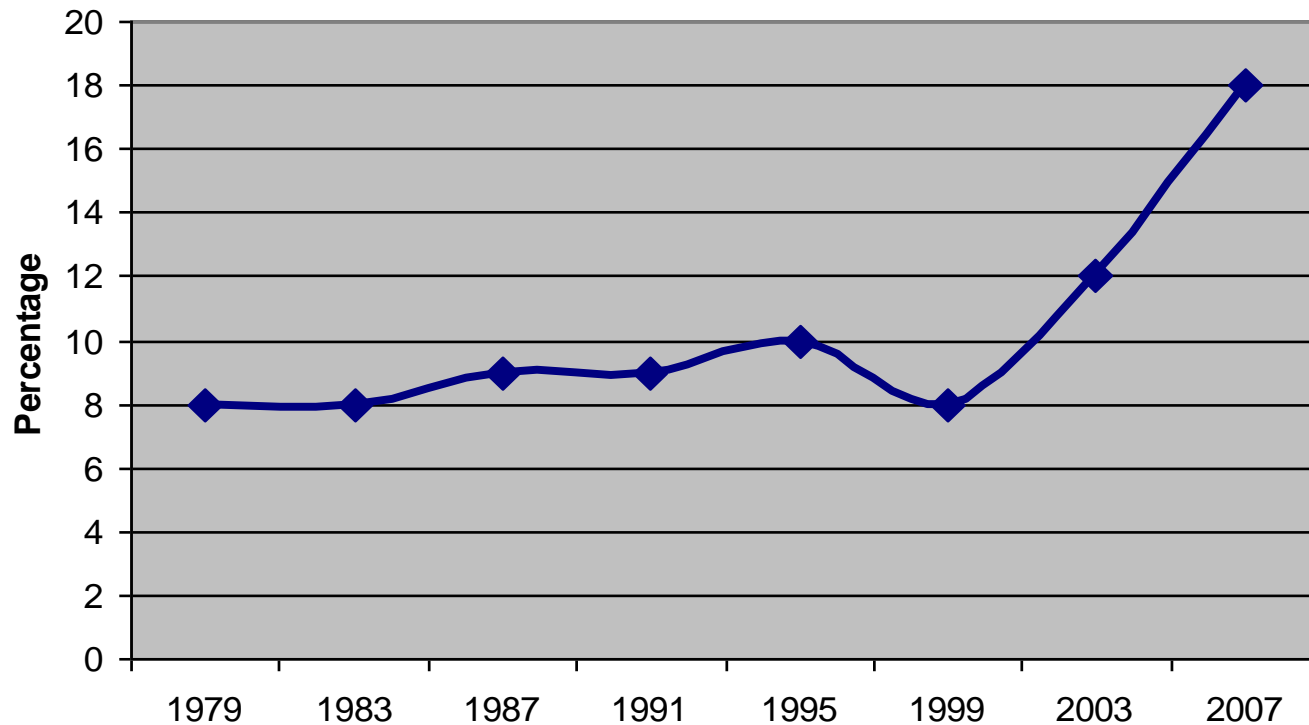


Bron: Scheerder & van Bottenburg (2009: 63)

3. Trends: two waves of running: The Netherlands

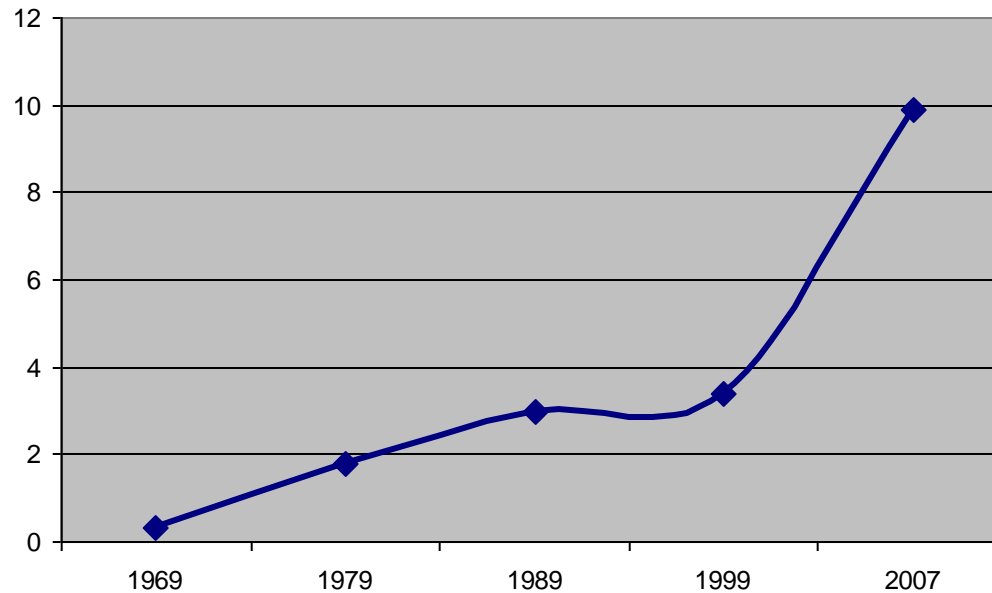
Percentage of Dutch population participating in
running/jogging (1979-2007)

Source: AVO (SCP 2008)



3. Trends: two waves of running: Flanders (Belgium)

Percentage of Flemish population participating in running/jogging
(1969-2007)



Bron: Scheerder 2009



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3. Trends

	REGION					
	Northern Europe	Western Europe	Southern Europe	Eastern Europe	Western Asian Europe	Total
The number of people participating has increased substantially	5	5	3	1	2	16
The number of people participating has increased slightly	2	3	8	8	3	24
The number of people participating has been stable	1	0	1	0	0	2
The number of people participating has decreased slightly	0	1	1	1	0	3
The number of people participating has decreased substantially	0	0	0	0	0	0
Total	8	9	13	10	5	45



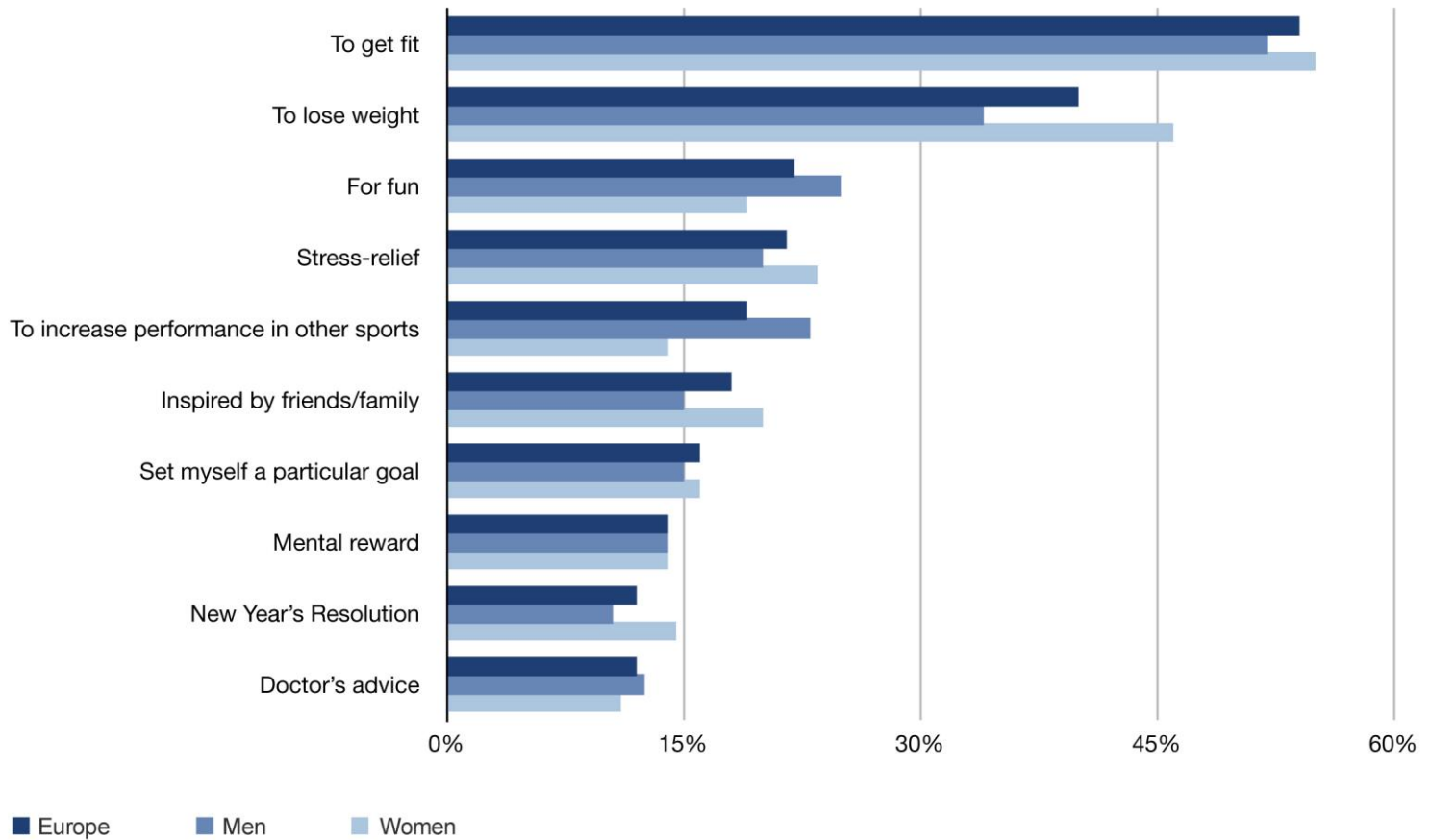
3. Trends

	REGION					
	Northern Europe	Western Europe	Southern Europe	Eastern Europe	Western Asian Europe	Total
The number of road running events has increased substantially	3	2	1	2	2	10
The number of road running events has increased slightly	4	3	7	5	3	22
The number of road running events has been stable	1	3	5	3	0	12
The number of road running events has decreased slightly	0	1	0	0	0	1
The number of road running events has decreased substantially	0	0	0	0	0	0
Total	8	9	13	10	5	45



3. Trends

Top 10 reasons for European runners to start



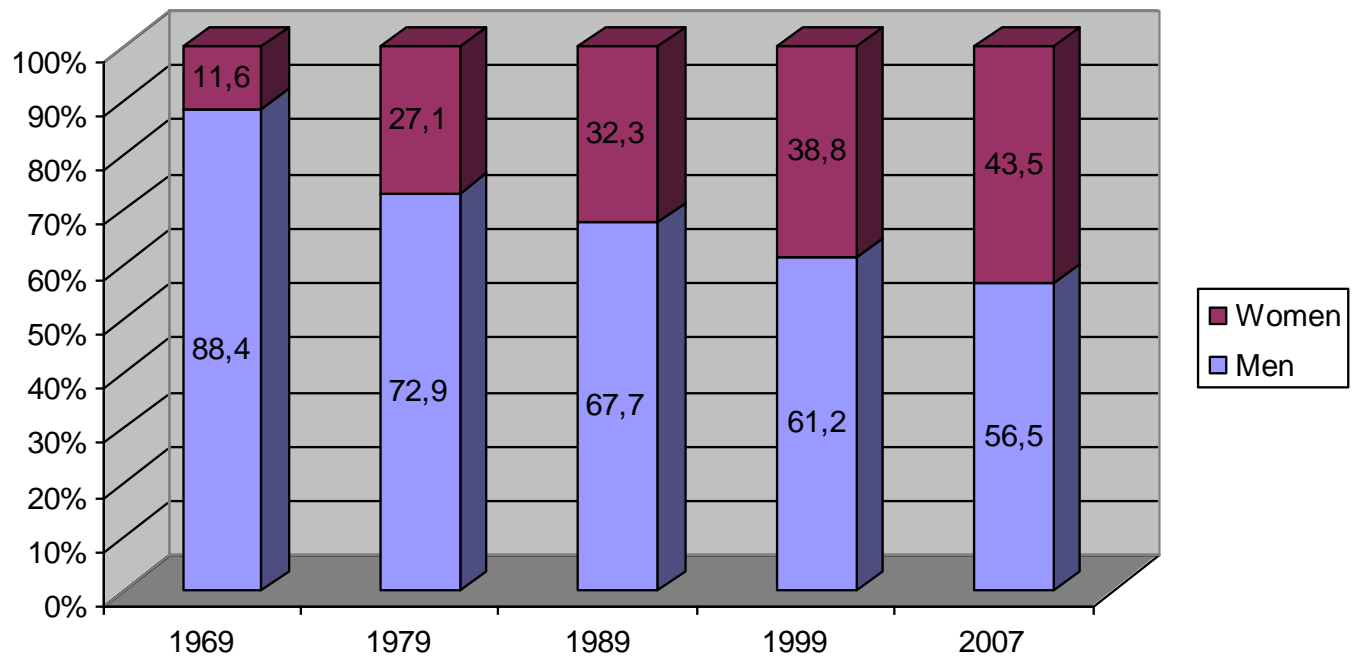
Source: Asics 2009



3. Trends

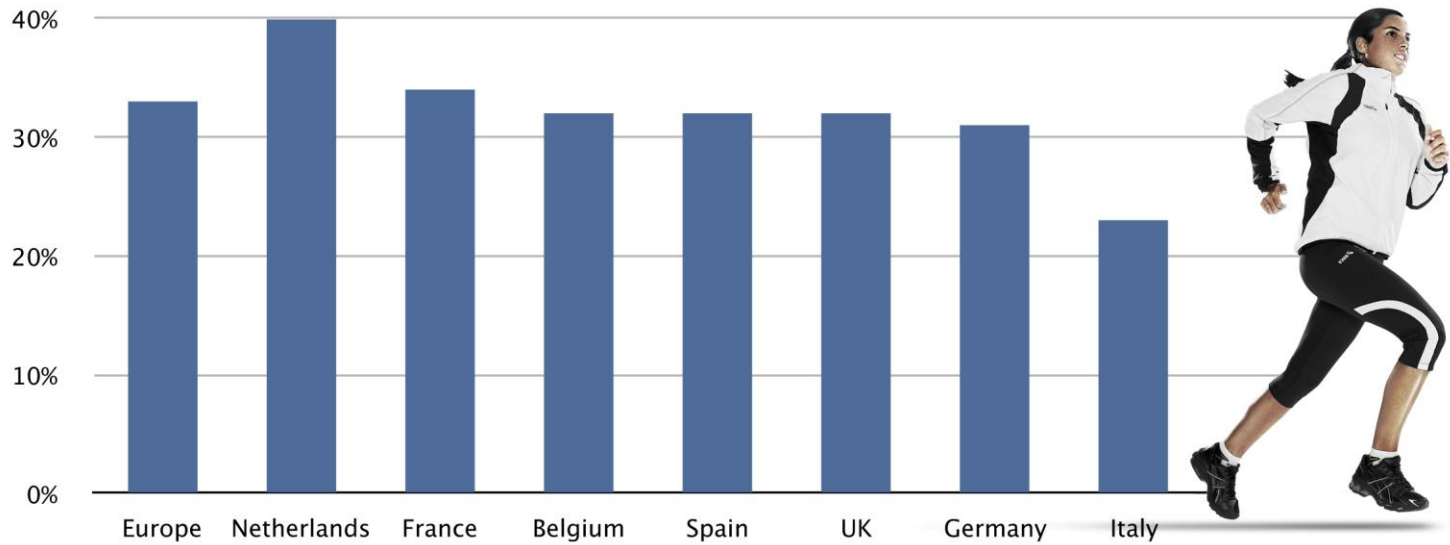
Men-women ratio of participants in running and jogging in Flanders, Belgium, 1969-2007

Source: Scheerder 2009



3. Trends

Percentage of all female runners that started less than one year ago



Source: Asics 2009

4. Size of the market

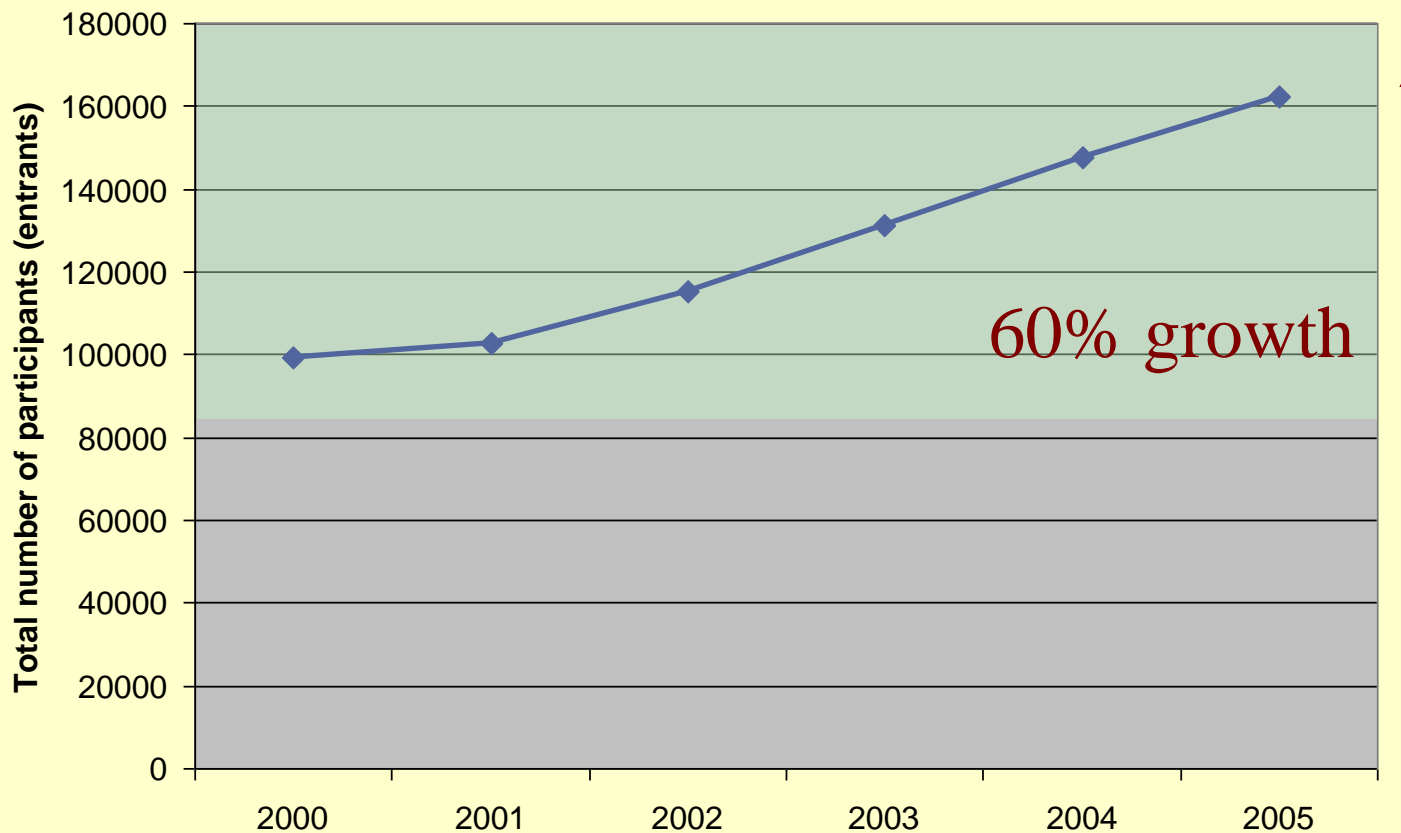
Road running event	Country	Participants
1 DHL Stafetten	Denmark	99260
2 JP Morgan Corporate Challenge Frankfurt	Germany	81091
3 Carrera El Corte Ingles	Spain	55000
4 Goteborgsvarvet	Sweden	50000
5 Volate a Peu	Spain	43000
6 Great North Run	UK	40000
Dublin Marathon	Ireland	40000
8 Real Berlin Marathon	Germany	35000
Lidingo Loppet	Sweden	35000
Dam tot Damloop	Nederland	35000



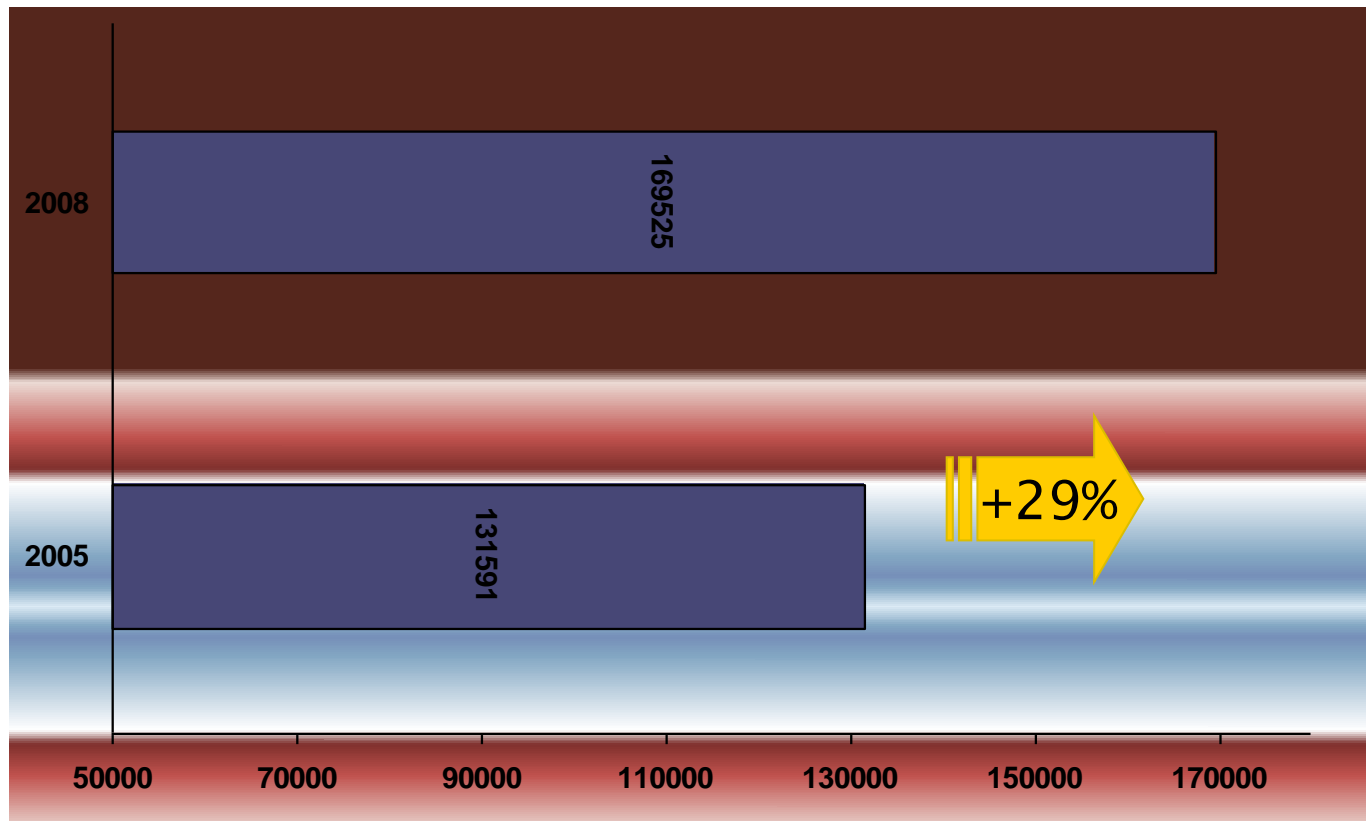


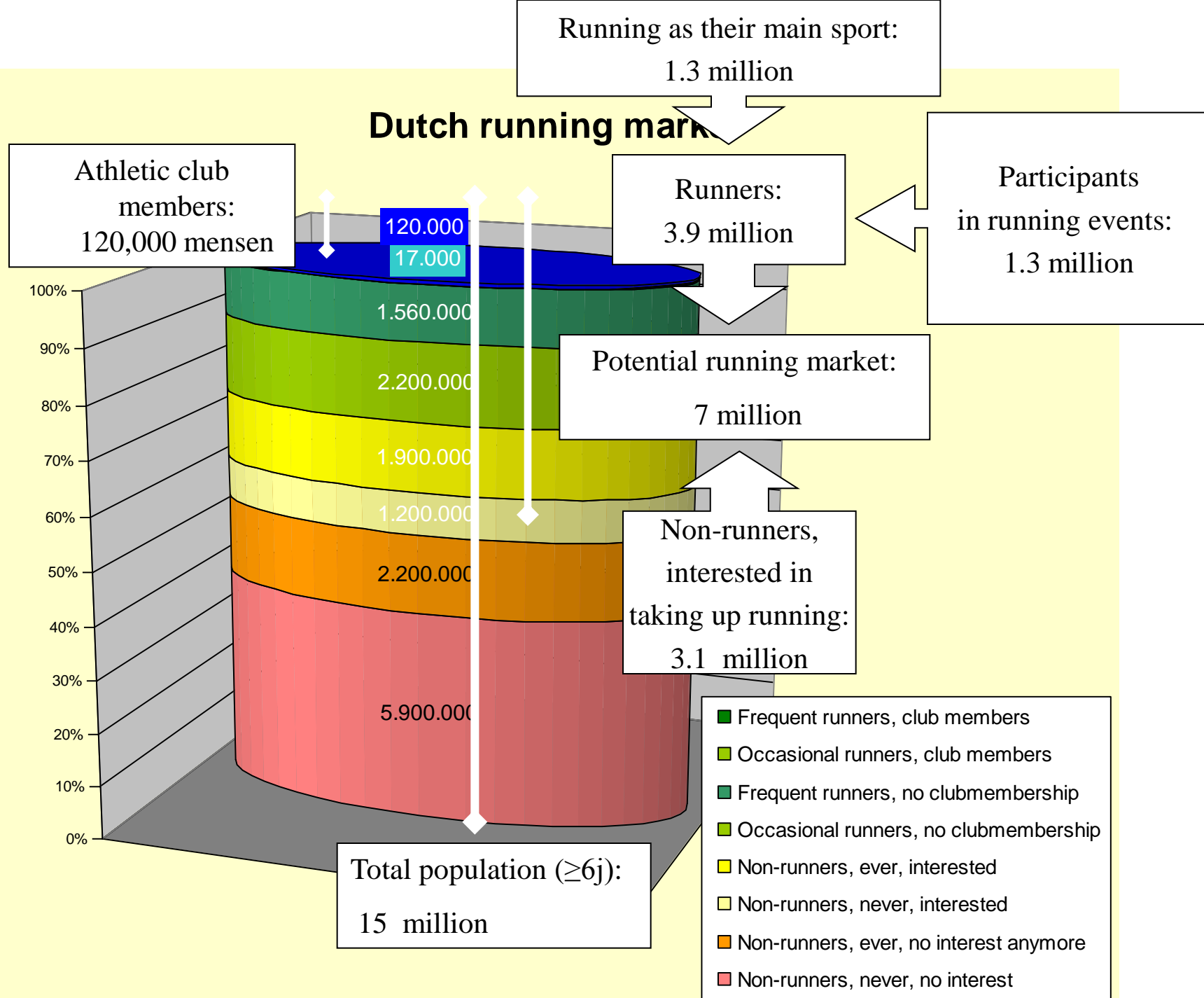
Entrants 25 biggest road running evens in the Netherlands, 2000-2005

(Source: ChampionChip Nederland, road running event organisations)

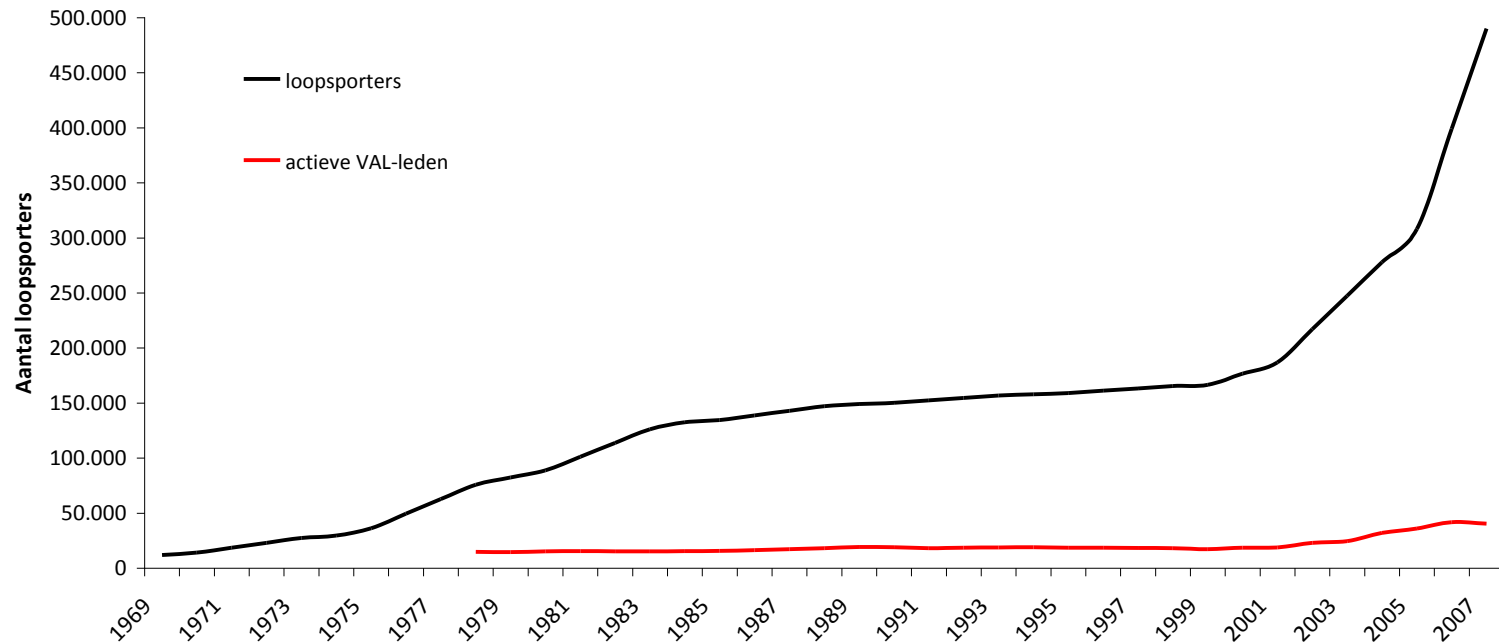


Number of participants at the seven biggest
Mass Participation Running Events
in the Netherlands, 2005 - 2008





4. Size of the market the market share of the VAL (Flanders, Belgium)



Bron: Scheerder (2009: 99)



5. Policy Strategies

Has your federation changed its policy over the last ten years in anticipation of - or in reaction to - changes in the road running market?

	Yes	No	Don't know	Total
Northern Europe	8	0		8
Western Europe	7	2		9
Southern Europe	5	8		13
Eastern Europe	5	4	1	10
Western Asian Europe	3	2		5
Total	28	16	1	45



5. Policy Strategies

Has your federation changed its policy over the last ten years in anticipation of - or in reaction to - changes in the road running market?

	Yes	No	Don't know
Participation in road running has increased substantially	14	1	1
Participation in road running has increased slightly	11	13	0
Participation in road running has been stable	1	1	0
Participation in road running has decreased slightly	2	1	0
Participation in road running has decreased substantially	0	0	0



5. Policy Strategies

Has your federation changed its policy over the last ten years in anticipation of - or in reaction to - changes in the road running market?

	Yes	No	Don't know
The number of road running events has increased substantially	10	0	0
The number of road running events has increased slightly	13	9	0
The number of road running events has been stable	4	7	1
The number of road running events has decreased slightly	1	0	0
The number of road running events has decreased substantially	0	0	0



5. Policy Strategies

		Is your federation actively striving to change this relationship?		
		Yes	No	Don't know
Relationship between federation and organisations that are in charge of popular mass participation road running events	The relationship is very good	0	7	1
	The relationship is good but it could be better	18	1	4
	There is a relationship but it could be much improved	4	4	
	There is no relationship	0	1	



6. Conclusions



6. Conclusions

- The running market is booming (for the second time)
- The membership figures of athletic federations are rising
- Nevertheless, their market share is decreasing
- Many athletic federations have changed their policy
 - New categories / types of membership
 - More cooperation with partners in the running market
 - More and better marketing information
- Two strategies
 - Promotion of running to enlarge the market
 - Encourage runners to join clubs to increase the market share
- By no means an easy job!



Thanks! Questions?



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