
Don't Miss the Next Boat

CHANCES AND CHALLENGES OF THE SECOND WAVE OF RUNNING FOR EUROPEAN ATHLETICS' MEMBER FEDERATIONS

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INTRODUCTION

Since the late 1960s, road running has been transformed from a competition between a small group of elite athletes into a leisure-time physical activity practiced by millions of people. Today, the huge groups of runners and joggers have completely different goals and abilities than winning a race. And only a small proportion of them is affiliated to an athletic club or school and as such to their national athletic federation. Most of them generally run and jog alone or in small, informal groups, so-called 'light running communities'. Nevertheless, millions of them increasingly participate in one of the many mass participation road running events, like the city marathons, half marathons, and shorter runs, such as the 10 miles, 10K's, 5K's or just 1K.

At first instance, athletic federations in Europe did not realize the potential of this growth for their organizations. They traditionally focussed on track and field and elite sport and tended to neglect the first wave of running that swept Europe from the 1970s onwards. In the last two decades, however, more and more (sport) organisations and athletic federations have become aware of the chances that the second wave of running offers. However, they face many challenges because they do not yet know how to break into this booming road running market successfully. Data, tools and strategies are lacking to profit significantly from this growth.

These chances and challenges have urged European Athletics to explore the potential of the growing road running market for its member federations. Professor Maarten van Bottenburg from Utrecht University in the Netherlands was therefore commissioned to conduct a study of the running trends that the member federations of European Athletics witness in their countries, how these member federations have responded to these trends, and what they can learn from each other in that respect.

1.1 RESEARCH QUESTIONS

The study was guided by the following research questions:

1. What are the main trends in mass participation road running throughout Europe?
2. What challenges and chances do the member federations of European Athletics face in responding to these market trends?
3. What management and marketing strategies have been developed by these member federations and how successful have they been in responding to the market trends in mass participation road running?
4. What can the member federations and European Athletics learn from this?

1.2 AIMS AND OBJECTIVES

The objectives of this research report is to give more insight into:

- the information that European Athletics' member federations have on the size, the development and segmentation of the running market in their country and their market share;

- the way(s) in which each member federation has responded to trends in the running market;
- the different structures that member federations have created – and the most successful and promising management and marketing strategies they have developed – to respond to trends in the running market in their country;
- the information gap on these topics.

The overall aim of this is to build up our understanding of trends in mass participation road running in all European countries so that European Athletics can best assist its member federations in developing well-considered and effective strategies to further expand the running market and increase their market shares.

1.3 METHODOLOGY

Various methods have been used to obtain the information needed: desk research, a web-based survey, and expert consultation.

1.3.1 DESK RESEARCH

Desk research was carried out to identify (trends in) the running market in Europe. This desk research was based on literature and internet search on mass participation road running events, requested research data from general population and specific sport participation surveys in various European countries, and a secondary analysis of three interrelated research projects on this subject in which the first author of this report was involved over the past five years.

The first of these research projects was carried out in 2005 to determine the size of the running market in the Netherlands, and the characteristics of the Dutch population that participates in jogging and running. This research, commissioned and financed by the Dutch Royal Athletic Union, involved a secondary analysis of two existing longitudinal datasets of population surveys in the Netherlands with approximately 13,000 respondents. In addition to this, a supplementary survey was carried out, using a stratified, disproportional sample of 1,000 non-runners and 1,300 runners, of whom 300 were members of an athletic club (Bottenburg, 2006a, 2006b). See appendix 3 for a summary of the research conclusions.

A second research project – in collaboration with the Mulier Institute, a Dutch centre for research on sports in society – was conducted between September 2008 and April 2009 among participants at the ten biggest mass participation road running events in the Netherlands, including the marathons of Amsterdam, Rotterdam, and Utrecht. In total, almost 55,000 runners responded to a survey of the participants of these running events. This study was commissioned and financed by the Dutch Royal Athletic Union and the organizations behind the participating running events. The survey was supplemented by in-depth interviews with 25 runners who participated in the Utrecht Marathon of April 13th, 2009 (Van Bottenburg & Hover 2009). See appendix 2 for a summary of the research conclusions.

A third research project – in collaboration with Jeroen Scheerder from the Katholieke Universiteit Leuven (Belgium) – focused on the growth of the running market from a historic and international comparative perspective. In this study, data time series on marathon participation available on the Internet (see for example www.arrs.net) were collected and

analyzed. In addition, journals and monographs were studied, taken from the expanding 'running literature', including biographies of forerunners of the running boom (Scheerder & Van Bottenburg 2009). This research project was part of a larger study on running in Flanders. See appendix 4 for a summary of the research conclusions.

1.3.2 WEB-BASED SURVEY

To answer the research questions about the market trends in mass participation road running throughout Europe and the management and marketing strategies developed by the national athletic federations to respond to these trends, a web-based survey of all fifty member federations of European Athletics was held. This Mass Participation Events Questionnaire consisted of 23 questions (totalling 39 items), mainly on trends, data management, marketing strategies and policy issues with respect to the road running market.

Each member federation of European Athletics was invited by email to log onto a special website and complete the survey one time only per federation (to prevent multiple responses from any country). It was indicated in the invitation letter that European Athletics considered completion of the survey a condition for payment of the 2010 European Athletics Support Programme. The email was sent to contact persons at each member federation. Their names and email addresses were provided by European Athletics.

The web-survey was opened from October 2nd to November 11th. A reminder was sent to those federations that did not respond within three weeks. After closing, two federations still sent their answers to the survey questions by email. In consultation with European Athletics, it was decided to include these data into the survey analysis as well.

In sum, 47 out of the 50 member federations (94%) took the time and effort to complete the full questionnaire. Only three countries, Cyprus, Greece and Montenegro, did not respond. The questionnaires were filled out by key persons in the member federations, like the CEO, the president, the general secretary, the general director, the international secretary, the technical secretary, the director of sport development, the sports director, etc.

The survey (N=47) therefore provides a representative assessment of road running trends in Europe according to European Athletics' member federations as well as a representative picture of the policy strategies by these member federations. As 94% of all federations have completed the same questionnaire by key persons, the results can be analyzed and compared at a cross-national level.

1.3.3 EXPERT CONSULTATION

Preliminary results of the Mass Participation Events Questionnaire were presented and discussed in plenary sessions and workshops at the European Athletics Mass Participation Events Conference, organized by European Athletics in Frankfurt from 7 to 8 December 2009. The remarks and conclusions drawn from these sessions and workshops with experts from the member federations were processed in the further survey analysis. Additional information was obtained by consultation of other experts in different European countries.

1.4 DEFINITION OF TERMS

In this study, road running was defined as *‘running or jogging on open roads, either in a recreational or competitive (at any level) context, and either within or outside the context of an athletic club.’*

1.5 PROJECT ORGANIZATION

The research project was carried out between July 2009 and March 2010. It was led and coordinated by prof. dr. Maarten van Bottenburg, who has a chair in Sport Development at the Utrecht School of Governance of Utrecht University. Prof. Jeroen Scheerder, who teaches sport policy and sport management at the Katholieke Universiteit Leuven in Belgium, and drs. Paul Hover, senior researcher at the W.J.H. Mulier Institute in the Netherlands, provided important data and critical comments at several stages of the research process. The technical process of the web-based survey was subcontracted to ISIZ, a specialist in the field of online research, domiciled in Amsterdam. The whole research process was followed and supported by Bill Glad, the member service manager of European Athletics.

1.6 REPORT STRUCTURE

The second chapter presents and discusses the main trends in mass participation road running and puts the rise and popularization of road running in a wider historical-sociological perspective. It also gives an overview of the size of today’s running market in Europe and estimates the market share of the athletic federations with respect to this market.

The third chapter first discusses main policy issues of the member federations with respect to the development of the road running market and then deals with the question in what respect member federations have changed their policies with respect to membership categories, data management and their relationship with event organizers.

In the fourth and final chapter, conclusions of the study are drawn and recommendations are presented and discussed about the lessons to be learnt from this study for European Athletics and its member federations.

The last part of the present research report consists of a bibliography and appendices (including the Mass Participation Events Questionnaire and summaries of two Dutch studies and one Flemish study described in section 1.3.1).

2 TRENDS IN MASS PARTICIPATION ROAD RUNNING

2.1 THE ORIGINS OF RUNNING AS A MASS PHENOMENON

That so many runners can be seen in the streets, huffing and puffing and sweating among shopping and business people, is not as self-evident as it seems to be nowadays. Only forty years ago, running generally meant competing in track and cross-country races through a school, university or athletic club. People felt embarrassed to run in public. Running was seen as a waste of energy, a frivolous pursuit. Those who started to run in public were often laughed and jeered at.

When the 'running guru' dr. George Sheehan picked up running again in the 1960s when he was 45 years old, he began in the privacy of his backyard because running was unheard of for a middle-aged man. Another pioneer in running, and the man who introduced aerobics, dr. Kenneth Cooper, advised those who felt embarrassed about running in public just to walk or to run on a treadmill at home (Stokvis & Van Hilvoorde, 2008). This especially held true for women. In an interview with *Runner's World*, Joan Benoit – the first women's gold medallist in the Olympic marathon – recalled that when she started running, she was so embarrassed to run in public that she would walk when cars passed her and pretended she was looking at the flowers. It was a popular belief that running was harmful and unhealthy for women.

If women participated in marathons, they had to remain clandestine. In 1966, Roberta Gibb hid behind a bush at the start of the Boston Marathon – the oldest annual city marathon in the world – and sneaked into the field, finishing as the first woman known to complete the Boston course (Sosienski, 2006). A few years later, number 261 in the Boston Marathon was assigned to K. Switzer. Not until two miles into the race did officials realize that Switzer actually was the 22-year old Katherine Switzer. They tried to rip the number off Switzer and remove her from the race, because women were still not allowed, but her team mates prevented them to do so (Derdeman, 1994).

The photographs of this famous moment in the history of running (like the one at the right) brought the issue of gender inequality in road racing to the public. In a period when the second wave of feminism addressed a wide range of gender inequalities, this situation soon became a political issue that led to a change of rules: the New York marathon allowed women to compete in 1971, and the Boston Marathon in 1972. The first women's Olympic Marathon was finally held in 1984.

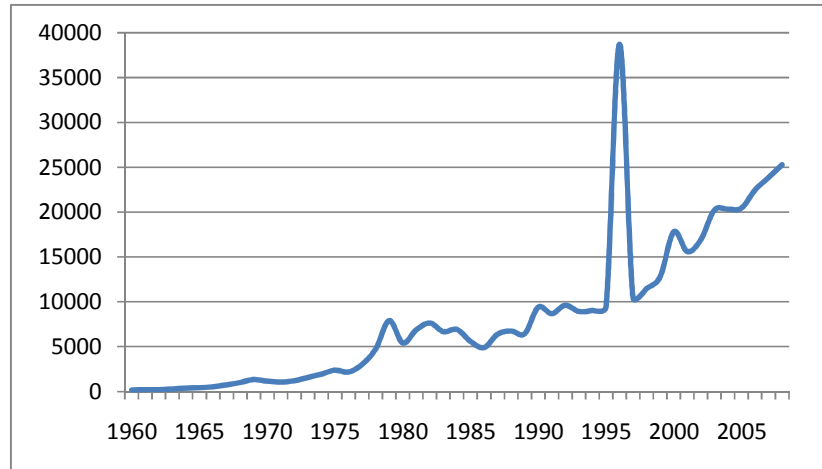


These flashbacks help to realize that today's mass participation in road running is a relatively recent development. Katherine Switzer, Joan Benoit, Ken Cooper (whose book *Aerobics* was published in 1968), James Fixx (author of the bestseller *The Complete Book of Running*, published in 1977), George Sheehan (author of the bestseller *Running & Being. The total experience*, published in 1978), and John Parker (author of the 'first running novel', *Once a runner*, published

in 1978) were among the forerunners of what is called 'the fitness revolution' and 'the running boom', which started in the 1970s.

Even the Boston Marathon, which already started in 1897, remained a small local event until the 1960s, with only a few hundred participants. Then the number of participants increased slowly and passed the 1,000 mark in 1968, and accelerated in the 1970s until a peak of almost 8,000 was reached in 1979. In the 1980s, these numbers remained relatively stable, followed again by a sharp increase after 1996, the centennial race, which attracted a record number of 38,708 entrants (see figure 1).

Figure 1: Year-by-year entrants Boston Marathon (1897-2008)



Source: <http://www.bostonmarathon.org/BostonMarathon/Participation.asp>

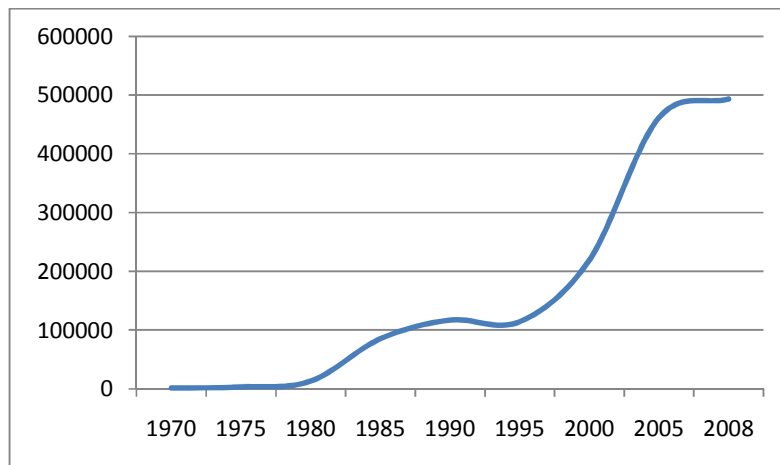
2.2 TWO WAVES OF RUNNING

The growth curve of the Boston Marathon repeated itself in Europe. Two waves can be identified, which can be shown statistically by the development of the number of marathons worldwide and the development of the number of people participating in these marathons.

The first wave of running started in the 1960s and spread and accelerated in the late 1970s. This was the time when other cities started an annual marathon tradition as well, like Budapest in 1961, Prague in 1963, Rome in 1965, New York in 1970, Athens in 1972, Honolulu in 1973, Berlin in 1974, Amsterdam in 1975, Paris in 1976, Madrid in 1978, Stockholm in 1979, and so on. Only a few of the present annual marathons started before the 1960s, like the world's oldest in Boston and Europe's oldest in Kosice, Slovakia, which started in 1924 for men, and in 1980 for women.

The growth of participants continued in the 1980s, but was followed by a period of stagnation in the early 1990s. At the end of that decade, however, the number of participants started to rise spectacularly again, leading to a second wave of running. The total number of marathon finishers again increased significantly, and even sharper than ever more (see figure 2).

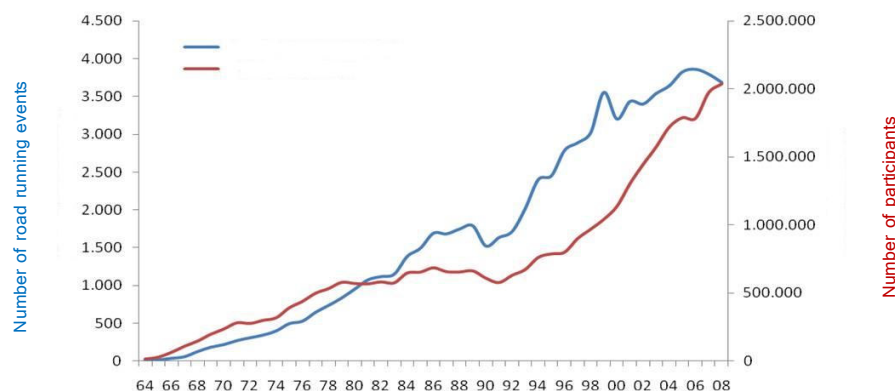
Figure 2: Marathon finishers in Europe, 1970-2005



Source: Calculation based on www.arrs.net; see Scheerder & Van Bottenburg 2009.

Additional data from individual countries point to the same waves of running. In Germany, for instance, both the number of running events and the number of participants particularly increased from the 1960s to the 1980s and then again from the middle 1990s onwards (see figure 3).

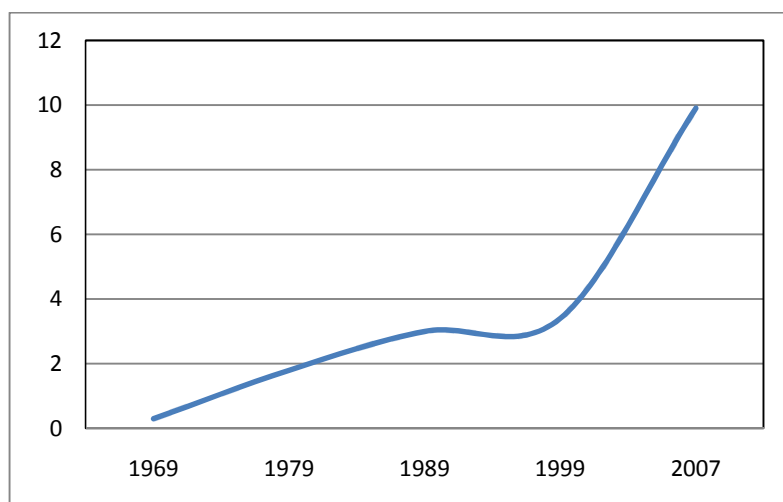
Figure 3: Number of road running events and their number of participants in Germany, 1964-2008



Source: Scheerder & Van Bottenburg 2009.

In Belgian Flanders, the number of people participating in running also multiplied by almost three over the last ten years, after a period of modest growth in the 1990s and a tenfold increase in the 1970s and 1980s; which again produces evidence of two waves of running during the last fifty years (see figure 4).

Figure 4: Percentage of the Flemish population (12-75 years) participating in running, 1969-2007

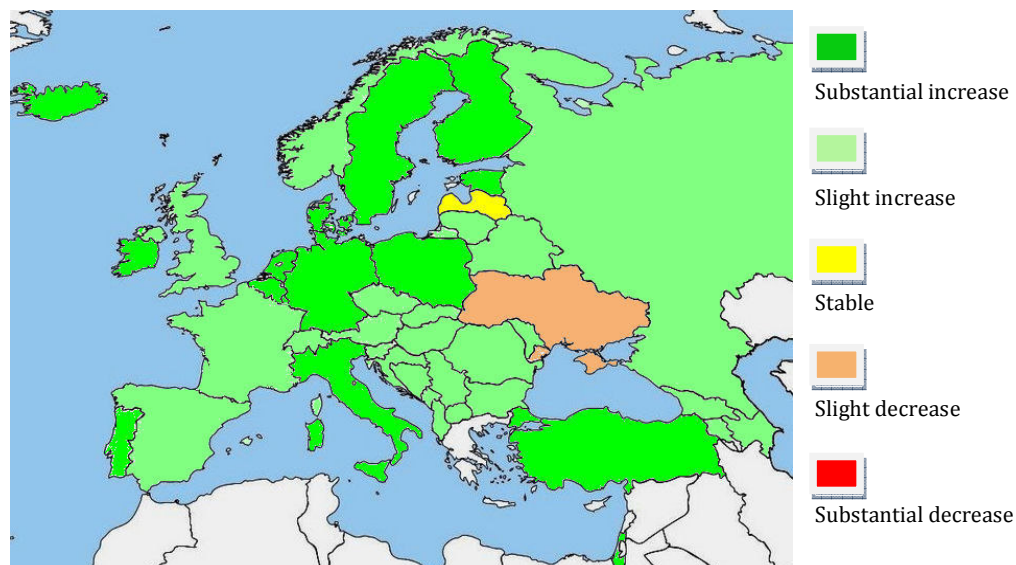


Source: Scheerder 2009.

2.3 RECENT TRENDS

Data from the Mass Participation Events Questionnaire and additional sources from European countries confirm this overall picture of a fierce growth in running over the last ten years (see figure 5). Only three countries (Andorra, Monaco, Ukraine) reported a decrease in the number of people participating in road running over the last ten years, while two countries (Gibraltar, Latvia) reported that this number has remained stable. All other member federations (i.e. 89 per cent) assessed that the number of people participating in road running in their country has increased. According to 25 member federations (53 per cent), this increase has been slightly; the other 17 member federations (i.e. 36 per cent) assessed this increase as substantial.

Figure 5: Assessment by member federations of the trend in road running in their countries



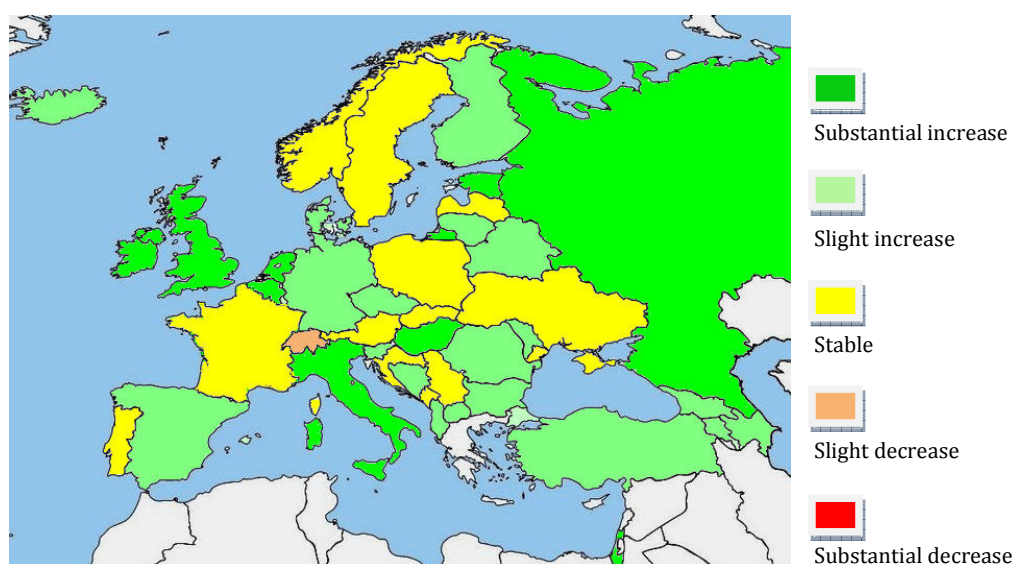
Source: Mass Participation Events Questionnaire (2009).

This expert assessment is supported by several trend data from individual countries.

- In the United Kingdom, for instance, the number of adults that participated in athletics, running and jogging at least once a month increased with 460,000 between 2005/2006 and 2007/2008, from 5.0 per cent to 6.1 per cent of the adult population. According to the Active People Survey, the biggest national population survey in Europe, 3.9 per cent participated in running at least once a week in 2007/2008; 258,000 more than a few years earlier (Sport England 2009).
- In the Netherlands, the percentage of the Dutch population (6 years and over) that participated at least once a year in running or jogging increased from 8 per cent (about 1.2 million people) in 1999 to 18 per cent (about 2.7 million) in 2007 (Breedveld, Kamphuis & Tiessen-Raaphorst 2008). Of all Dutch and Flemish participants in the ten major running events in The Netherlands (16 years and older) who considered running as their main sport in 2009, 71 per cent started to practice this sport after 1998 and 51 per cent after 2003 (Van Bottenburg & Hover 2009).
- In Germany, the number of participants in road running events sharply increased in Germany, from 970,000 in 1998 to over 2 millions in 2008 (information from the Deutscher Leichtathletik-Verband).
- In Flanders (Belgium), 58 percent of the present runners started to run after 1999, indicating a strong increase during the last decade (Scheerder 2009).

With respect to the trend in road running *events*, 32 member federations (68 per cent) reported that their number is increasing, while 14 member federations (30 per cent) described the trend in running events as stable, and only one (2 per cent) assessed the trend as slightly decreasing (see figure 6).

Figure 6: Assessment by member federations of the trend in road running events in their countries



Source: Mass Participation Events Questionnaire (2009).

As the maps show, the growth in road running is a broad European trend, not confined to a particular region or part of the Continent.

2.4 FROM COMPETING TO COMPLETING

Many pioneers of the first wave of running were former track athletes, who had stopped running after they left school or college, but who picked up running again after years of sedentary jobs with a high pressure of work in higher level management and professional staff positions. The same goes for the early adopters: although they did not have the same kind of 'track record' in running, many of them held higher level management and professional staff positions and tried to change their sedentary lifestyle and its culture of dining, smoking, and drinking (Stokvis & Van Hilvoorde 2008).

This trend was related to the rise of what was called 'western' or 'managerial diseases', resulting from increased smoking, new eating patterns, and decreased physical activity. Like aerobics, running became increasingly seen as a means to manage your body, to look good and impress others (Stokvis & Van Hilvoorde 2008). The pioneers and early adopters of the first running boom were still highly motivated by competition and running high mileage. Although many of them were in their thirties or forties when they picked up running again, in some circles "your time for the marathon was the be-all and end-all of your existence", as Bill Rodgers, the four times winner of the marathons of Boston and New York, put it (Rodgers & Douglas 2003: 8).

This can be contrasted with the second running boom, which started in the late 1990s, when new and larger groups of people took up running and jogging. Compared to the first running wave, women and middle aged men predominate in the second. The share of women in the number of finishers in major American marathons rose from 10 percent in 1980 to 26 percent in 1995 and 40 percent in 2005. In Europe, this trend can also be witnessed (Scheerder & Van Bottenburg 2009). At the same time, the average age of the marathon runners increased from 33 in 1980 to 39 in 2007. Today, in Flanders (Belgium), the Netherlands as well as the United Kingdom, at least 60 per cent of all participants in running is between 30 and 55 years of age; with female runners on average four years younger than male runners (Flanders: Scheerder 2009; Netherlands: Van Bottenburg & Hover 2009; UK: Active People Survey 2007/08). In general, these middle aged runners lead an active life. Most of them are employed and have a family, so that for them flexibility is one of the main advantages of running over other sports. The majority does not jog or run as a member of a club, school or team. They practice their sport on their own or in small informal groups, together with friends or colleagues (see table 1 for a socio-demographic breakdown of participants in Dutch running events).

Today, people participate in running and running events for other reasons than the former track athletes of the first running wave: as a survey covering runners aged between 15 to 65 years in the United Kingdom, The Netherlands, Germany, Belgium, France, Spain, and Italy (commissioned by Asics and conducted by market research institute Synovate) revealed, these people mainly run for getting fit, losing weight, having fun, and stress relief (see figure 7). Their challenge is finishing and not winning; 'completing' instead of 'competing'. They do not see marathons as competitive races for athletes and serious runners, but as a social (sporting) event which is within reach of almost everybody. As a result, the average finishing time at road running races has been getting slower over the last thirty years (Scheerder 2009).

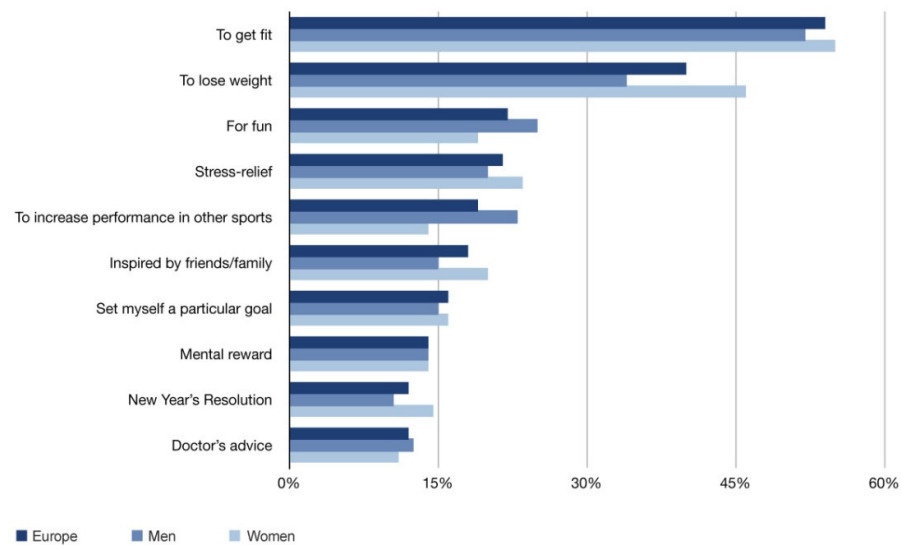
The organizers of road running events have anticipated on this trend. Today, they organize both a race and a run at the same time. The road running events are not only a competition between athletes, but also a running experience for people who like to participate in a mass event. To facilitate these people, several road running event organizers have expanded or abolished the time limits of their races. Moreover, they have introduced new running distances, like the 10 miles, 15K, 10K, 5K, and even 1K-runs, and have developed new running events to differentiate between target groups, like the introduction of business runs, women's runs and kids' runs.

Table 1: Runners participating in Dutch running events (2008/2009), by sex, age group, household, income level and social context of running

	Total	Sex		Age group				Household			Income level			
		Male	Female	<30	30-55	>55	Un-known	Singles, adults with no children living at home	Adults with children living at home	Other	≤ Standard income	1 to 2 times standard income	≥ 2 times standard income	Un-known2
Athletic club	23	22	26	12	23	35	19	23	24	20	23	24	21	26
Informal group	21	19	24	19	21	20	19	20	21	18	20	20	21	21
Alone	49	52	42	62	49	36	50	50	48	53	50	49	51	46
Other	7	6	8	6	7	9	12	7	7	9	7	7	6	8

Source: Van Bottenburg & Hover 2009, based on post race surveys of people who participated in one or more of the ten biggest Dutch running events (N = 54,778)

Figure 7: Reasons to run for people in eight western European countries (2008)



Source: Asics (<http://www.everythingaboutrunning.asics.eu>)

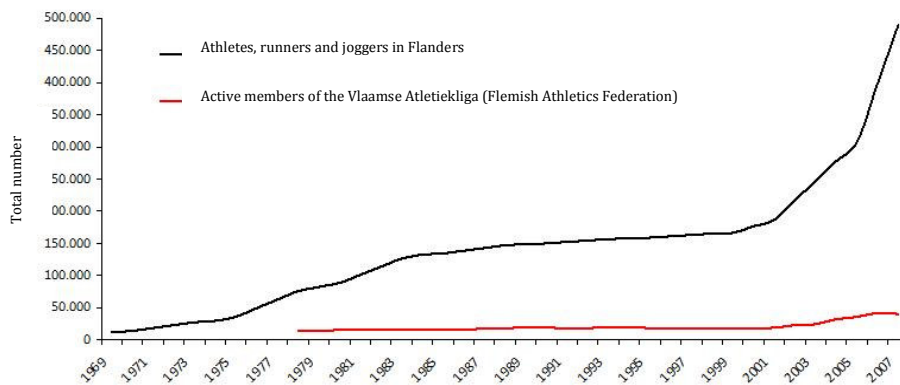
2.5 ATHLETIC FEDERATION'S DECLINING MARKET SHARES

While the mass participation running market in Europe has grown significantly, European Athletics' member federations only show a modest increase in their membership numbers. As a result, it can be concluded that their market shares are diminishing: the member federations represent a declining proportion of the total number of people participating in athletics (at least, if athletics as a sport is defined broadly to include running and jogging).

- In Germany, for example, the athletics federation counted 899,520 members in 2005, against 4.3 million Germans who described themselves as ambitious runners that year, and circa 13 million people who practiced running and jogging as a leisure sport (Kaiser 2005). The membership number of the athletics federation grew with 7 per cent from 1998 to 2008, while the number of participants in road running events increased with 110 per cent, from 971,579 in 1998 to 2,038,963 in 2008 (information from the Deutscher Olympischer Sportbund and the Deutscher Leichtathletik-Verband).
- In the Netherlands, the number of people participating in athletics, running or jogging increased with 750,000 over the last five years, while the Dutch athletic federation welcomed 30,000 new members during this period (Van Bottenburg & Hover 2009, NOC*NSF 2003-2008). In 2006, the potential running market in the Netherlands was estimated at 7 million people. Of the total population of 16 million people of six years and over, there were 11.2 million non-runners, of which 3.1 million indicated that they were interested in or expected to start running in the near future. A quarter of the Dutch population, or 3.9 million people, participated in running at least once a year. This included 1.6 million people who ran more than once a week; and an almost identical number (1.3 million) who regarded running as their main sport. Also 1.3 million people participated in a running event at least once a year (Van Bottenburg 2006). Yet, the total number of athletic club members in the Netherlands, does not exceed 130,000. As elsewhere, the overwhelming majority participates in running outside the context of a club.
- The Swedish Athletic Association reported in the Mass Participation Events Questionnaire that it has approximately 350,000 members, organized in around 1,000 clubs divided into 23 districts. In addition to these athletes, about half a million people participate in competition on main roads and cross-country and more than a million who run for exercise without taking part in any competition at all. The majority of these runners are not associated with an athletic club.
- UK Athletics reported in the same questionnaire that 125,000 adults are members of a club where they participate in athletics (including track and field, road running and jogging). This is 5 per cent of those who have participated in athletics in the last four weeks. In addition, there are 520,000 people who have taken part in organized competition in athletics in the last twelve months. Another 2 million participated in athletics in the last four weeks, without taking part in competitions.
- According to the athletic federation of Iceland, about two thirds of the total number of runners (estimated at 15,000) are not affiliated to the federation; also because the Constitution of the National Olympic and Sports Association of Iceland does not allow for the inclusion of unaffiliated athletes into the system.

- The Vlaamse Atletiekliga (VAL), the Flemish athletics federation in Belgium, counted 40,000 members in 2007, which was less than 10 per cent of the overall number of athletes, runners and joggers in Flanders that year (Scheerder 2009). Although the membership figure has risen in recent years, the market share of the VAL – i.e. the membership number as percentage of the overall number of runners and joggers – has dropped since the 1970s and quite dramatically since the turn of the millennium when the second running wave started (see figure 8).

Figure 8: Number of people in Flanders that participated in athletics, running and jogging (1969-2007) versus active members of the VAL (1978-2007)



Source: Scheerder 2009.

Although similar trend data sets could not be obtained in the context of this study for other European Athletics' member federations, the data presented in this chapter suggest that the declining market share is a broad process, possibly valid throughout Europe. The membership figures of the athletics federations in Europe seem to increase slightly, while the overall number of people participating in running and jogging is rising much faster; especially in the first decade of the 21st century.

As far as available data permit us to conclude, this second wave of running will continue in the years to come. In both the United Kingdom, the Netherlands and Flanders, athletics came out as the one sport that more than a million adults said they would like to participate in, or participate in more often in the near future (Sport England 2009; Van Bottenburg 2006; Van Bottenburg & Hover 2009; Scheerder 2009). The mass participation running market is still growing; but the athletic federations will not automatically profit from this growth.

3 POLICY STRATEGIES OF ATHLETIC FEDERATIONS

3.1 MAIN POLICY ISSUES

Many member federations of European Athletics traditionally focussed on track and field and elite sport and neglected the potential of the quickly growing number of road runners. During the last decade, however, many federations who missed the boat of the first wave of running have been looking for possibilities to jump on board during the second wave of running. However, they now often find themselves in a disadvantageous position to control the mass participation running event market and to profit from its growth; at least compared to those federations – like the Finnish, Swedish, and Danish – that already got involved themselves (or through affiliated groups of clubs and districts) in organizing road running events at an earlier stage.

Thus, it will hardly come as a surprise that the main policy issues of the member federations with respect to the development of the road running market are primarily to organize and get control of the running events, to promote and market running, and to recruit more club members out of the growing running market. Collaboration with the running industry and data collection and data management are of lower priority for a majority of the member federations (see table 2).

Table 2: Main policy issues for European Athletics' member federations with respect to the development of the road running market.

	Yes	No
Organization and control of running events	57%	43%
Promotion and marketing of running	53%	47%
Club membership recruitment	53%	47%
Collaboration with the running industry	36%	64%
Data collection and data management	34%	66%
Training of running coaches	32%	68%

To promote road running in their country, most member federations cooperate with road running event organizers and national and local governments. About half of the member federations cooperate with companies in the running industry, other companies (like sponsors) and the national sports confederation (see table 3).

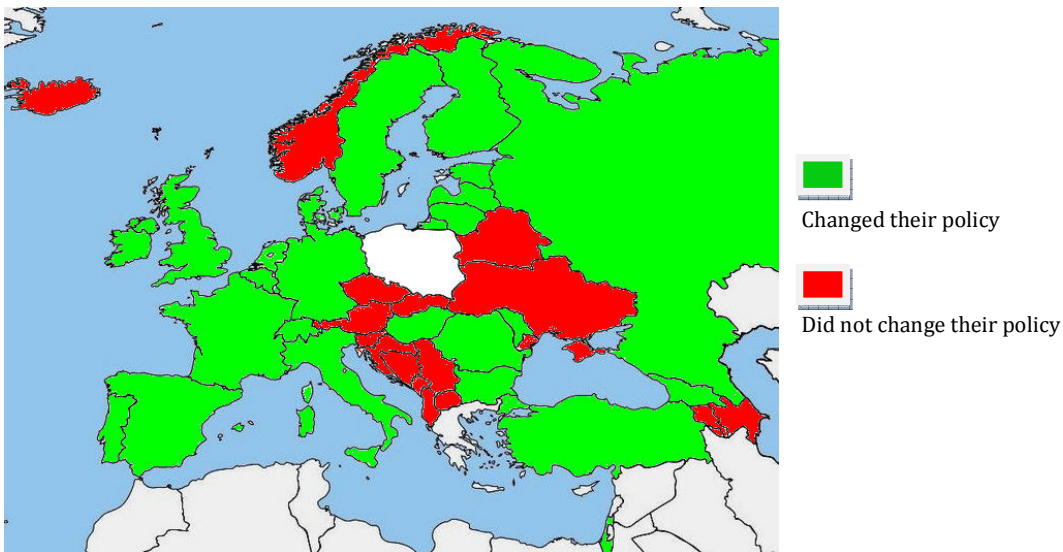
Table 3: Cooperation of European Athletics' member federations with other organizations to promote road running in their country.

	Yes	No	n.a.
Road running event organizers	77%	9%	15%
National/local government	70%	15%	15%
Other companies	55%	30%	15%
Companies in the running industry (shoes, magazines, drinks, etc.)	53%	32%	15%
National Sports Federation	51%	34%	15%

3.2 POLICY CHANGES

Six out of ten (28 out of 47) member federations of European Athletics recorded in the Mass Participation Events Questionnaire that they have changed their policies over the last ten years in anticipation of – or in reaction to – the opportunities and challenges that the trends in mass participation road running offer (see figure 9). The Portuguese athletic federation, for example, established a national program for walking and running with the support of the government and local authorities. In Hungary, the athletic federation stopped ignoring road running about ten years ago and established good relations with the private entities that had filled the gap and occupied the road running market.

Figure 9: Change of policy by member federations of European Athletics in anticipation of – or in reaction to – changes in the road running market

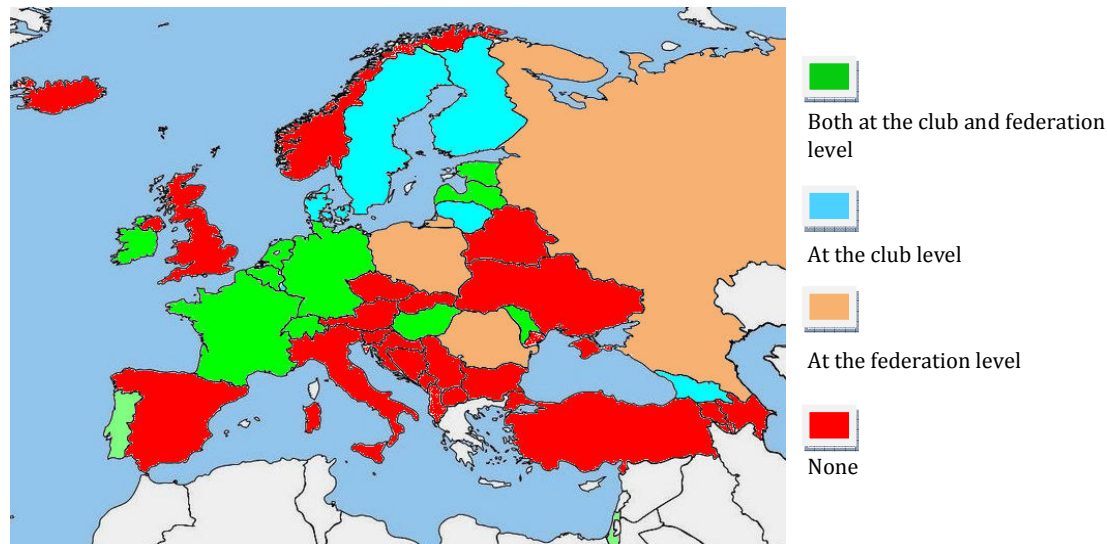


Source: Mass Participation Events Questionnaire (2009).

3.2.1 INTRODUCING NEW MEMBERSHIP CATEGORIES

For 21 of the 28 federations, this policy change meant among other things the introduction of new categories or types of membership; 7 introduced these new categories at the club level, 3 did so at the federation level, and 11 at both the club and the federation level. The German athletic federation, for example, decided to include walking and Nordic walking. In Ireland, the athletic federation introduced a 'Fit4Life'-programme and Fit4Life-membership category, to encourage the recreational runners and those competing in road races to join a group and become part of a club. And the Dutch athletic federation endorsed a 'Start to Run'-programme and introduced a new 'light' membership category (Dutch Runners) to include runners and joggers into the federation who prefer a great deal of flexibility and a minimum of obligations and rules of behaviour with respect to their membership. Against these federations, there were 26 member federations of European Athletics that did not introduce new categories or types of membership (see figure 10).

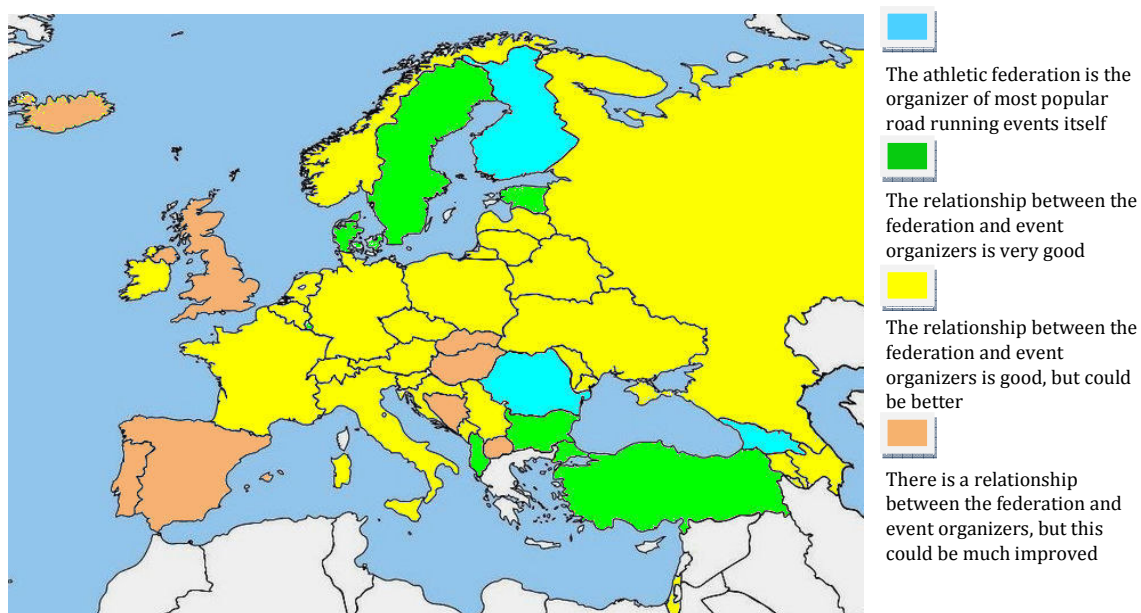
Figure 10: Introduction of new categories or types of membership for people who are interested in road running by member federations of European Athletics



3.2.2 IMPROVING RELATIONS WITH EVENT ORGANIZERS

As a consequence of their policy in the past, most member federations of European Athletics are now confronted with other – often commercial – entities that act as organizers of mass participation road running events. These agencies often meet the athletic federations with some indifference, reticence or even hostility; partly prompted by strained relations in the past, when the athletic federations rather hindered than assisted them.

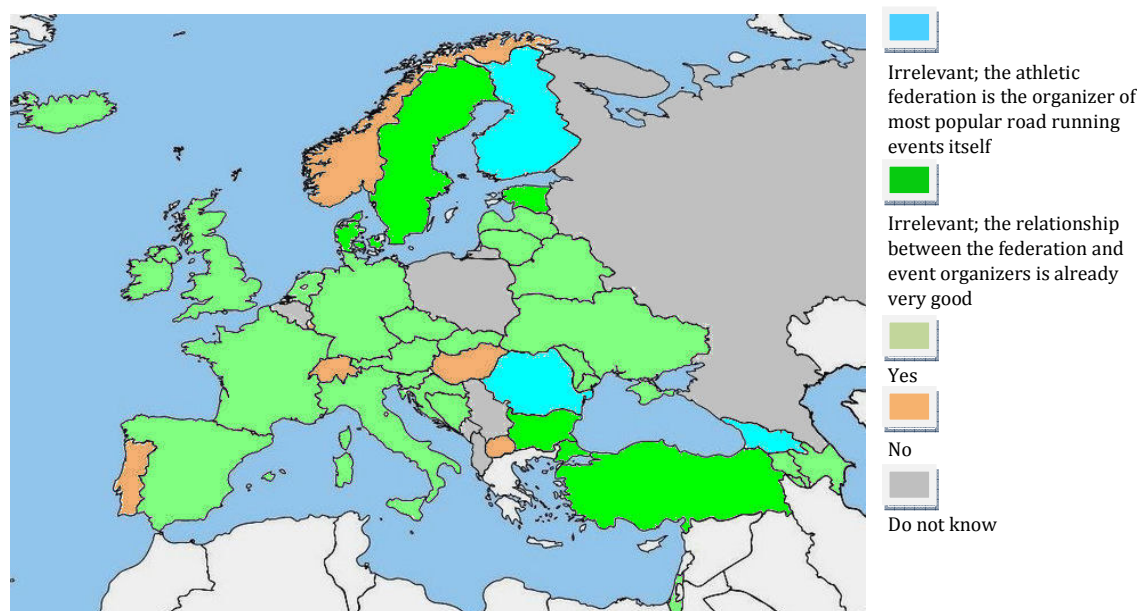
Figure 11: Characterisation by the member federations of their relationship with other organizations that are in charge of popular mass participation road running events



As figure 11 shows, there are a few countries (coloured blue) where the federation organizes the most popular road running events - Finland, Rumania, Georgia, Gibraltar, Monaco – and some other countries (coloured green) where the relationship between the athletics federation and other organizations that are in charge of popular mass participation road running events are characterised as very good - Sweden, Denmark, Albania, Bulgaria, Turkey -. In all other countries, the member federations indicate that the relationship could be better (coloured yellow) or much improved (coloured beige).

With the exception of the countries where the relationship between the member federations and the road running event organizers is good, most federations indicate that they are actively striving to change this relationship (coloured green in figure 12). Some respondents marked that they did not know the answer for their federation (coloured grey). For others, the question was irrelevant, either because their federation organizes the most popular road running events (coloured blue) or because the relationship is already characterized as very good (coloured yellow).

Figure 12: Are member federations actively striving to change the relationship with other organizations that are in charge of popular mass participation road running events?



3.2.3 GETTING MORE AND BETTER DATA

In the Mass Participation Events Questionnaire all member federations were asked what kind of data they have on the road running market (trends) in their country. On the basis of ten questions about this topic, a data management scale was computed for each member federation. If a federation indicated that it had data on all the requested topics with respect to road running participants, it could score a maximum of 20 points on this scale. Federations without any data would score 0 points. The results of this analysis show that only a few member federations (Armenia, the Netherlands, San Marino and the United Kingdom) have a rather complete overview of the road running market in their country, including data on the number of road runners and their social characteristics, the frequency of road running by people, their reasons to run, the social context of road running, the number of road running events, and the main trends in the running market (see figure 13).

Figure 13: Assessment of data management by European Athletics' member federations based on computed data management scale (minimum score = 0, maximum score = 20).

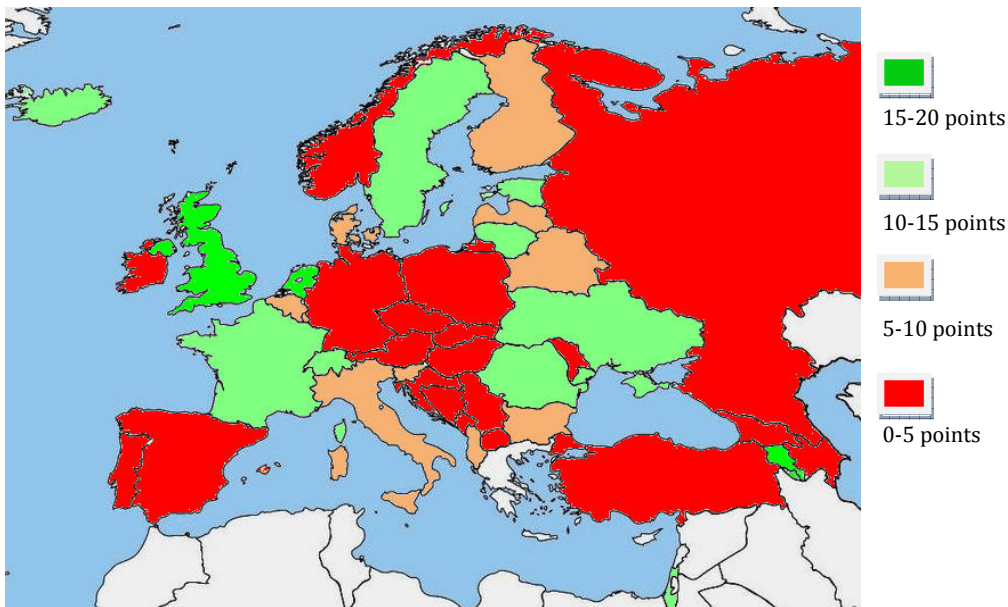
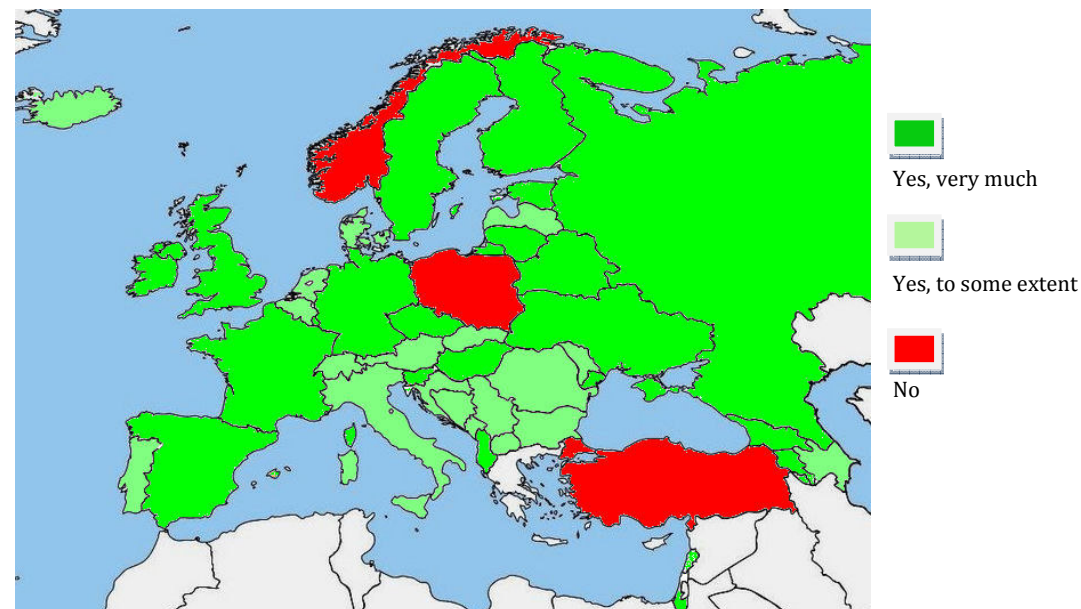


Figure 14 shows that most member federations see the need for improving this situation. At least, 44 out of 47 federations indicated in the Mass Participation Events Questionnaire that they attach importance to getting more and better data on the rapidly growing mass participation road running market. With three exceptions, this also holds true for those member federations that are currently only having poor market data at their disposal (see figure 14).

Figure 14: Does the member federation of European Athletics attached importance to getting more and better data on the mass participation road running market in their country?



4 CONCLUSIONS AND RECOMMENDATIONS

4.1 CONCLUSIONS

It has become evident from this study that the mass participation road running market is rapidly expanding throughout Europe. Two waves of running can be distinguished: the first one started in the late 1960s and continued until the late 1980s; the second wave of running started in the late 1990s and still keeps on going.

Compared to the first wave, the second wave attracts runners from a variety of social groups. The member federations of European Athletics, however, are facing difficulties to develop added value for these runners, hampering their ability to profit from this growth with an increase in club and/or federation membership numbers. Their main problem is that they focused too long during the first wave of running (only) on track and field and elite sport, without presenting themselves as the 'natural authority' of road running and mass participation road running events as well. As a consequence of this policy, most member federations are now confronted with other entities that act as organizers of mass participation running events.

Most of these road running event organizations operate outside the traditional sport organizational structure and attract an increasing number of participants, while the athletic federations only show a modest increase in their membership numbers. It can be concluded, in other words, that the market share of European Athletic member federations is diminishing: they represent a declining proportion of the total number of people participating in athletics, at least if running and jogging is included as a part of the athletic movement.

The situation where most member federations find themselves today, is not an easy one. It appears to be difficult to improve their relations with the main road running event organizers; partly because the federations rather hindered than assisted them in the past. Moreover, it proves to be difficult to convince individual runners and joggers of the added value of club or federation membership. These runners and joggers are not dependent on the athletic club's venue and facilities, neither on the instructions of their trainers and coaches, nor on their official competitions. They can run whenever and wherever they like. They can surf on the Internet to look for information on training schemes, running shoes and running clothes. And if they would like to, they can subscribe almost every weekend to a very well organized running event, varying from city marathons to runs over longer and shorter distances, without being affiliated to an athletic club or the athletic federation.

The challenge, therefore, is (1) to get to know the background, needs and objectives of the growing groups of runners and joggers, (2) to adapt and innovate the standard range of products and services of the athletic club and federation to become more competitive and better meet the needs of the growing ranks of runners and joggers, and (3) to improve the relationships with the road running industry and road running event organizers and collaborate with them in promoting running as a sport and proving the added value of a club or federation membership.

Promising steps have already been taken in this direction. There is a growing awareness among European Athletics' member federations of the urgency to change their policy in reaction and anticipation of their declining market share. Many (although not all) of European Athletics' member federations are striving to get control of main running events, to realise multi beneficial relationships with event other running event organizers, to collaborate more with the running industry, to introduce new membership categories and/or to pay more attention to data management. In this way, they have taken steps to (re)position themselves as the 'natural

authorities' of running and running events; i.e. an indispensable organization for all runners and joggers throughout their countries because of the added value they (can) have for all people who want to start and keep running.

4.2 RECOMMENDATIONS

To further improve the position of European Athletics and its member federations as the 'natural authorities' of road running and road running events, they need to adjust and focus their policy strategies.

The first challenge mentioned in the conclusions is to get to know the background, needs and objectives of the growing groups of runners and joggers. This asks for specific research data and more sophisticated forms of data management. In consultation with its member federations, European Athletics should define the kind of data on competitive and recreational road running that is vital for a modern marketing policy. Member federations should be stimulated - and possibly facilitated - to increase their insight in their changing market share and in the backgrounds, needs and objectives of the growing groups of people that enter the running market. This asks for data on the number of registered and non-registered runners, the frequency of their road running, their main social characteristics and reasons to run, and the social context in which they take part in running. Only a few member federations already possess such data, but almost all attach importance - at least to some extent - to getting more and better data on the mass participation road running market. Especially the United Kingdom and the Netherlands offer good practices in this respect.

The second challenge is to adapt and innovate the standard range of products and services of the athletic club and federation to become more competitive and better meet the needs of the growing ranks of runners and joggers. This requires innovativeness and creativity from the athletic federations. In consultation with its member federations, European Athletics should promote - and possibly facilitate - product development based on market data and good practices on what works, what should work and what does not work in tempting runners to become a member of an athletic club or the athletic federation. New membership categories should be introduced, so that the running possibilities can be further geared towards the characteristics, needs and objectives of the new groups of runners, who are predominantly between 30 and 55 years old, employed, often married with children, and thus living a very active, busy life. This asks for new membership categories and new membership packages, with 'light' forms of social and institutional bonding and high modes of flexibility. Such a strategy will require a change in the culture and structure of organized athletic sports and a new perspective on the function and role of the athletic clubs and athletic federation with regard to the growing running community. Countries like Germany, Ireland and the Netherlands offer several good practices in this respect. These examples, however, also show that the introduction of new membership categories is only a first step. Even these forerunners in innovative road running marketing are still looking by 'trial and error' for the optimum policy strategy. This trial and error process should be monitored closely at a European level, in order to avoid a situation in which each member federation is re-inventing the wheel.

The third challenge is to improve the relationships with the road running industry and road running event organizers and to collaborate with them in promoting running as a sport and proving the added value of an athletic club or federation membership. This points to the importance of a changed attitude on the part of the athletic federations towards more and better collaboration, communication and marketing. Most member federations of European Athletics have indicated that they indeed like to improve their relationship with both the running industry and the road running event organizers. However, their experiences show that it is by no means

an easy job to do so and profit from the growing road running market. This holds particularly true for those member federations who missed the boat of the first wave of running and did not get involved in organizing the main mass participation road running events. As they often meet indifference, reticence or even hostility from the side of the running event organizers, it will be of paramount importance to improve this relationship. This can only start with respect, and giving rather than taking. A better atmosphere needs to be created to get a running dialogue with the running industry, asking for diplomacy and good will from both sides. As a next step, the running event organizers could be stimulated to organize themselves in a committee or other body and be represented in the General Assembly or a road running committee of the athletic federation. Good practices in this respect can be found in Sweden, Denmark, Estonia, Luxembourg, Bulgaria, and Turkey, while member federations in countries like Hungary and the Netherlands offer examples of promising attempts to improve the relationships with the running industry and road running event organizers. Here too, European Athletics should collect these good practices and monitor and evaluate the improvements made in this respect.

All in all, it is to be recommended to focus the policy strategy of both European Athletics and its member federations towards becoming the 'natural authority' on road running and road running events. In consultation with its member federations, European Athletics should elaborate a coherent strategy in this direction. Above all, this will mean that European Athletics and its member federations should define and redefine their added value; both to the road running industry and event organizers and the individual road running participants. To inspire confidence as the 'natural authority' on road running and road running events, the federations should make clear that they not only want to profit from the growing road running industry, but also and primarily because of this added value. Such a strategy will also open up the way for cooperation with the government and companies with an interest in public health. After all, running is an important weapon in the battle against obesity and heart and vascular diseases, and their related health costs. It is indeed of the highest public value that the athletic federations don't miss the next boat!

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APPENDIX 1: MASS PARTICIPATION EVENTS QUESTIONNAIRE

Welcome to the Mass Participation Events Questionnaire!

The aim of the survey is to build up our understanding of the running and jogging market in all 50 European countries so that European Athletics can best assist its Member Federations.

The results will be presented in the Mass Participation Events Conference of 7-9 December 2009 in Frankfurt, and they will be available on the European Athletics website.

Your data will be processed and presented anonymously and kept under full confidentiality.

Before you go on with the first question, please be aware that in this questionnaire we define “road running” in the broadest terms. In other words, ***road running means running or jogging on open roads, either in a recreational or competitive (at any level) context, and either within or outside the context of an athletic club.***

1. According to your expert assessment, which of the following statements best describes the trend in road running over the last ten years in your country?

- ☐ The number of people participating has increased substantially
- ☐ The number of people participating has increased slightly
- ☐ The number of people participating has been stable
- ☐ The number of people participating has decreased slightly
- ☐ The number of people participating has decreased substantially
- ☐ Don't know

Your comments, if desired:

2. According to your expert assessment, which of the following statements best describes the trend in road running events over the last ten years in your country?

- ☐ The number of road running events has increased substantially
- ☐ The number of road running events has increased slightly
- ☐ The number of road running events has been stable
- ☐ The number of road running events has decreased slightly
- ☐ The number of road running events has decreased substantially
- ☐ Don't know

Your comments, if desired:

3. 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

Your comments, if desired:

4. Has your federation (and/or clubs) introduced new categories or types of membership for people who are interested in road running?

- ☐ Yes, both at the federation and the club level
- ☐ Yes, only at the federation level
- ☐ Yes, only at the club level
- ☐ No
- ☐ Don't know

Your comments, if desired:

5. Does your federation actively promote mass participation road running and road running events in your country? Please tick the appropriate boxes

- ☐ Yes, mass participation road running
- ☐ Yes, mass participation road running events
- ☐ No
- ☐ Don't know

Your comments, if desired:

6. Does your federation cooperate with other partners to promote road running in your country?

	Yes	No
Companies in the running industry (shoes, magazines, drinks, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Other companies	<input type="checkbox"/>	<input type="checkbox"/>
Road running event organisers	<input type="checkbox"/>	<input type="checkbox"/>
National / local government	<input type="checkbox"/>	<input type="checkbox"/>
National Sports Confederation	<input type="checkbox"/>	<input type="checkbox"/>
Other, namely	<input type="checkbox"/>	<input type="checkbox"/>

Your comments, if desired:

7. Who is the organiser (or are the organisers) of the most popular road running events in your country?

- ☐ My federation
- ☐ Other organisations (for example a foundation, commercial entity, governmental organisation)
- ☐ A combination of my federation and other organisations
- ☐ Don't know

Your comments, if desired:

8. How would you characterise the relationship between your federation and other organisations that are in charge of popular mass participation road running events?

- ☐ The relationship is very good
- ☐ The relationship is good but it could be better
- ☐ There is a relationship but it could be much improved
- ☐ There is no relationship
- ☐ Don't know

Your comments, if desired:

9. Is your federation actively striving to change this relationship?

- ☐ Yes
- ☐ No
- ☐ Don't know

Your comments, if desired:

10. What are the main policy issues for your federation with respect to the development of the road running market?

Please tick the appropriate boxes

- ☐ Organisation and control of running events
- ☐ Collaboration with the running industry
- ☐ Promotion and marketing of running
- ☐ Data collection and data management
- ☐ Club membership recruitment
- ☐ Training of running coaches
- ☐ Other, namely
- ☐ Don't know

Your comments, if desired:

11. Does your federation have data on the number of registered road runners in your country in 2008?

- ☐ Yes, ...
☐ No
☐ Don't know

Your comments, if desired:

12. Does your federation have data on the total number of registered road runners in your country of previous years?

- ☐ Yes, my federation has these data since...
☐ No
☐ Don't know

Your comments, if desired:

13. Does your federation have access to data from other sources on the number of people participating in road running in your country (either competitive or recreational and within or outside an athletic club)?

- ☐ Yes, reliable figures
☐ Yes, rough estimates
☐ No
☐ Don't know

Your comments, if desired:

14. Does your federation have specific data from any source in your country on:

	Yes	Partly	No	Don't know
The frequency of road running by people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The reasons to run by people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The social context of road running (alone, informal group, club)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The main social characteristics of road runners in your country (men/women, age groups)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Your comments, if desired:

15. Does your federation have data on the total number of sanctioned road running events in your country in 2008?

- ☐ Yes, reliable figures
☐ Yes, rough estimates
☐ No
☐ Don't know

Your comments, if desired:

16. Does your federation have data on the total number of non-sanctioned road running events in your country in 2008?

- ☐ Yes, reliable figures
☐ Yes, rough estimates
☐ No
☐ Don't know

Your comments, if desired:

17. Does your federation have information on the number of participants in the most popular road running events?

- ☐ Yes, quite complete
- ☐ Yes, but only partly
- ☐ No
- ☐ Don't know

Your comments, if desired:

18. Does your federation have access to data on the names and addresses of the participants in the most popular road running events?

- ☐ Always
- ☐ Often
- ☐ Sometimes
- ☐ Never
- ☐ Don't know

Your comments, if desired: Except, see comments on Q 19.

19. Which are the three biggest road running events in your country with respect to the number of participants?

1
2
3

- ☐ Don't know

Your comments, if desired:

20. How many participants did these three biggest road running events in your country have?

Do not know

Number of participants in [answer 19-1]:

☐

Number of participants in [answer 19-2]:

☐

Number of participants in [answer 19-3]:

☐

Your comments, if desired:

21. Does your federation attach importance to getting more and better data on the mass participation road running market?

- ☐ Yes, very much
- ☐ Yes, to some extent
- ☐ No
- ☐ Don't know

Your comments, if desired:

22. Please fill in:

Name:

Email:

Tel.:

Federation:

Position:

23. Are you willing to provide some further information on these topics by email or in a telephone interview?

- ☐ Yes
- ☐ No

Your comments, if desired:

You have reached the final question of this questionnaire. Many thanks for your cooperation.

APPENDIX 2: REPORT SUMMARY (1)

Bottenburg, M. van & Hover, P. (2009). *Running event participants. Research into the success factors of road running events based on an analysis of the motivation, experience and assessment of the participants*, Utrecht/'s-Hertogenbosch: Universiteit Utrecht/ W.J.H. Mulier Institute.

The popularity of practising the running sport has increased spectacularly in the Netherlands in the past four years. This has not been a constant development. It is possible to distinguish two waves of running. The term “wave of running” refers to a period of growth in participation after a period of reduction or stabilisation. The first “wave of running” started at the end of the 1960s and stagnated in the early 1990s. The second “wave of running” started at the end of the 1990s and there are indications that it is still continuing. In 2007 eighteen percent of the Dutch population of six years and older practised running, jogging or did keep-fit exercises.

Running events have contributed to the second wave of running. It meets a need of experienced runners. However, these events also provide a suitable range of activities for starting runners through low-threshold sub-events and, if required, guidance in the preparations by experienced runners. Events therefore also contribute to the continuity and new growth within the running sport. Since events meet a need of hundreds of thousands of runners and are therefore a basis for the second wave of running, the Royal Dutch Athletics Federation is interested in the participants of these running events. Its interest is also based on the fact that a very limited part of the runners practise their sport in a club or group context. Not only the Athletics Federation, but also event organisers are obviously fascinated by the purchasers of their product.

The Athletics Federation and organisers of ten major events are united in the Platform Running Events. This platform commissioned this study. The ten events that participate are: Tilburg ten Miles, Dam tot Damloop, 4 Mijl van Groningen, Marathon Eindhoven, Amsterdam Marathon, Zevenheuvelenloop, Egmond Halve Marathon, City Pier City Loop, Marathon Rotterdam and Utrecht Marathon. Based on the need of know-how of the platform, the study had a broad orientation. For example, it examined preparations, the social context, evaluated events, examined the intensity of running in the past and present, the interest in running-related products and services and socio-demographic features. The target group consists of Dutch and Belgian participants of 16 years and older. The data were collected through a personalised e-mail invitation and a web questionnaire. There were 54,778 complete and correctly filled-out questionnaires, which is a response of 43 percent. In addition, additional knowledge was obtained through 25 semi-structured in-depth interviews with runners from the target group. This study has made a contribution to the knowledge regarding a major and important segment in the runner's market: event runners. In this summary the most important results of all events will be described.

Almost sixty percent of the event runners are native men or women in the age group between 30 and 55 who carry out paid work. Most event runners are men (seventy percent). This share will probably decrease in the future, also because the sex ratio in young cohorts is distributed more evenly. About 50% of the event runners started to run in the past five years. Almost half of the runners whose main sport is running (more than half of all event runners) also do it more frequently than before. Event runners certainly do not stop within one year after the event: nine in ten runners expect that they will run as much or even more within that period.

About half of the event runners trains alone, a quarter is a member of an athletics club or a member of Dutch Runners (formerly Loopservice.nl) and almost one fifth trains in an informal running group. A small segment of the runners can be classified under “miscellaneous”. Members of athletics clubs train more frequently and longer distances compared to individual

runners. The athletics club is therefore an important context and stimulator for continuing and intensifying the practice of running sports.

More than one third of the event runners are interested in a membership of an athletics club. In this context individual assistance by professionals is the most requested service. It is estimated that the result of marketing campaigns of the Athletics Federation for participants of the ten events may lead to an increase in members of up to 41,000 members. This is a great challenge, because experience shows that event runners are a group that does not easily commit itself, as other providers also try to meet the wishes and needs of runners. It is possible to strengthen the position of the Athletics Federation by extending the cooperation with event organisations, introducing innovative concepts on the market, such as the Running Coach on a MP3-player, and stressing more emphatically that athletics clubs have a range of services, more than before, so that runners can join a running group in a "light" way, without too many obligations. It is not sure whether runners know about this sufficiently. Running events offer a channel to present this message in a better way. After all, this is a way to reach many potential members.

Running events are rated highly. They have a general average rating of 8.4 on a scale between 1 and 10. The various running sports events are not rated very differently in this respect. There is a variation between 7.9 and 8.6. This is a remarkable achievement for the organizers. There are often repeat visits: more than 80% of the runners had participated in a running event more frequently and 60% of the runners had already been a participant in the same running event. Participating in running events gives the runners positive energy. It is a focus for their training and an opportunity to compete, often with the encouragement of friends and family. Events are especially selected on the basis of the atmosphere and entourage, but the participation of friends and family is also often a reason to participate in a certain event.

The success of these events can be partly ascribed to the fact that the expected atmosphere at an event is of great importance when considering to register or not, in combination with the fact that this aspect has the highest rating. On a scale of 1-10 the events have an average rating of 8.6 with regard to this aspect. The aspect with the lowest rating (there are no insufficient ratings) is related to sanitary facilities (toilets, showers) and all the commotion on the track. These aspects that require improvement are very "actionable" for organizers (obviously up to a certain level).

Sponsor identification can be improved. About half of the company names that were connected to running events were identified by the participants as sponsor or non-sponsor. Sponsor targets may differ greatly, but it may be considered to be an elementary basic target that sponsors of an event are recognised.

Events have to meet the challenge to (further) focus on their positioning and (continue) meeting the various requirements and expectations of runners.

APPENDIX 3: REPORT SUMMARY (2)

Bottenburg, M. van (2006a). *The second wave of running. On the growth and volume of the running market in the Netherlands and how the Royal Dutch Athletics Federation can profit from it.* 's-Hertogenbosch: W.J.H. Mulier Institute.

This study shows that there is a second running wave. After the first running wave in the 1980s and its consolidation in the 1990s, a second running wave occurred at the turn of the century. Increasingly more people have been taking part in running, and runners have been participating in their sport more frequently than before.

The second running wave has been founded upon four cornerstone developments: (1) the increasing importance attached to physical condition (slimness, muscularity), fitness and health, (2) their importance particularly among women; which is related to (3) the growing possibilities of taking part in running in a way that suits the efforts of the individual to become slim, muscular, fit and healthy; and (4) decreasing barriers for participation in running through the commercialisation and improved professionalism of the various sports.

The Royal Dutch Athletics Federation is profiting from the growing running market. The athletic federation is growing faster than the average sports federation. Nevertheless its market share of the total running market shows that many possibilities available for further growth are not yet being taken advantage of. Only a small part of the total running market (108,000 people or 3% in 2005) is affiliated to an athletics club. What's more, the running market is growing faster than the athletics federation, resulting in a decreasing market share.

This small and slightly decreasing market share is not at all surprising considering the commercialisation and professionalisation of the running market. New commercial running event organizers are more effective than the traditional athletics clubs in responding to the changing needs of the runners, particularly the new group of runners who focus more on slimness, muscularity, fitness and health.

Traditionally sports clubs have to provide four types of services:

- facilities;
- training and instruction;
- competitions and tournaments;
- social environment and group bonding.

For various reasons these services do not appeal to the runners of today. First of all, there is a decreasing need for the facilities of the athletics club. Secondly, runners can find training and instruction at increasingly more places. Training programmes, training with a heart rate meter, clothing and nutrition tips, injury prevention and treatment can all be found on web sites, at commercial running suppliers and in running shops and magazines. Approximately one third of runners have consulted a Runners World magazine at some time; one seventh have obtained information from Atletiek Magazine. A quarter of the runners actively use specific web sites on running, for example for running programmes. Others get their running programmes through their friends, acquaintances and companies such as Asics, Nike, PK and Polar. And thirdly – in addition to this – due to the arrival of professional running events the athletics clubs have lost their monopoly in organising running competitions.

Last but not least, the modern runner has values that are different to the performance-oriented athlete who had long formed the core of the athletics club. Health and fitness are by far the most important reasons for running. Social contact and a pleasant environment are far less important

to the runner, even more so for competitions and tournaments. The runner welcomes social contacts, but in a different way than previously: he or she prefers weak ties to strong ties. Ties that you can look for and stop when ever you so wish, instead of long-term memberships. Ties with various networks at the same time, instead of intensive ties with clubs that require more dedication and loyalty.

It is essential for the athletic federation and athletic clubs to take account of the various groups of runners that can be distinguished in the running market. First of all men and women; secondly young people under the age of thirty, those above 30 and 40 years of age, and those above the age of 50; thirdly, club runners, events runners and occasional runners; and fourthly fitness runners and performance runners. By combining these groups it is possible to distinguish specific target groups with specific running behaviours and needs.

In order to be able to adequately respond to the behaviour and needs of these target groups, further innovations are required from the athletic federation as well as the athletics clubs. They should be stimulated to develop partially, fully or complementarily from supply-oriented, close communities that set rules, prohibitions and orders and that demand loyalty and dedication, into demand-oriented, flexible and casual communities with relatively few codes of contact, aimed at the – possibly temporary – realisation of the goals that the various groups of runners appear to have.

APPENDIX 4: REPORT SUMMARY (3)

Scheerder, J. & Boen, F. (Eds.) (2009). *Running in Flanders. The running market from a social scientific research perspective*. Ghent: Academia Press.

In this publication the findings from a large-scale study on leisure-time running are reported. More than 9900 people participated in an online survey. The data have been weighted by means of a representative sport participation survey. In this way, the researchers collected data on different characteristics with regard to running, among others, frequency, organizational context, motives, attitudes and expenses.

During the last decade the popularity of running has strongly increased in Flanders (Belgium). Nowadays, ten percent among 12 to 75 year old people actively participates in running. At the end of the 1990s this number equaled three percent. After a first wave of running in the 1970s, a second one can be distinguished since the late 1990s. Almost 58 percent of the present runners entered the running market after 1998, indicating the spectacular growth of running during the last ten years.

Generally, the success of the second wave of running can be explained by three main developments. First, new market segments have been reached by the providers of running products and running services. Especially women and elderly are now more present among runners compared to previous decades. Second, new types of organization have grown in popularity. At present, only one out of ten runners is an active member of an athletic club. On the other hand, informal running settings and more flexible organizational contexts have become very popular among runners. Easily accessible running programs, such as the Start to Run, have successfully convinced a lot of people to participate in recreational running. At the same time, commercial running events attract thousands of people. This kind of events also seems to be of interest to public agencies that include these events in their city and region marketing programs. Third, competition is no longer the only value why people participate in running. Practicing running for reasons of health, recreation and/or social contacts has gained in importance.

Five types of runners can be detected: (1) individual runners (41%), (2) social-competitive runners (26%), (3) companionship runners (18%), (4) health runners (9%), and (5) performance runners (7%). Such a diversity of runners requires a differentiation in how to reach these different segments. Moreover, the results from this study also indicate that the rise of the popularity of running still continues at present. Nine percent of the population in Flanders says to be sure that they will partake in running in the future. This implies that the number of runners could be almost twice the number of the actual runners. So, more efforts from running providers such as sport federations, governments as well as commercial organizations will be needed in order to meet the runners' variety of needs and demands.

From a social-psychological perspective, runners are characterized in terms of their underlying motives for engaging in running, and in terms of how strongly they identify as a runner. The results of the survey showed that although health-related and freedom-related reasons top the list, social reasons also play a significant role, especially among female and organized runners. In total, about one third of all runners claim to run because of social reasons. These findings suggest that, at least in Flanders, the traditional image of the lonely long-distance runner needs to be qualified. Moreover, the runners in this study reported to identify quite strongly as a runner and to feel connected with other runners. This is especially the case for competitive runners who are a member of a running club. Further analyses revealed that the more strongly runners identify as a runner, the more they perceive runners as a cohesive group. This perception of cohesiveness (i.e., entitativity) was in turn positively related to the belief that

runners constitute the prototypical sports(wo)men. To conclude, one cannot ignore the 'social side' of running, both on the track (i.e., running with and for your co-runners) and in the head (i.e., running because you feel like a runner).

Based on short post-race interviews immediately after the finish of a running event, we also explored the satisfaction of runners with their participation in the event and their intention to come back next year. Besides some general background and running characteristics, finishers also had to indicate to what extent they valued and were satisfied with four characteristics of running event organizations: location, ambiance, price/quality balance, and registration procedures. The results indicated that runners were in general very satisfied with the organization and reported a high estimated chance (i.e, 84%) that they would return one year later. Women proved to be somewhat more satisfied with the ambiance and their own running performance. Most importantly, perceived importance of and satisfaction with the location turned out to be the best predictors of the intention to come back next year. It can be concluded from these findings that organizers of running events are doing a good job in the eyes of their participants, and that the location of the running event is a crucial factor that attracts participants to a running event.