

Don't miss the next boat: Europe's opportunities and challenges in the second wave of running

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By Maarten Van Bottenberg, Jeroen Scheerder, Paul Hover

ABSTRACT

Road runners and joggers are the largest group of athletics participants in Europe and the running market is expanding rapidly. However, few in this group consider themselves to be inside the traditional sport of athletics and only a small proportion is currently affiliated to an athletic club and thus to their national athletic federation. During the first running wave, which took place from the late 1960s through the 1980s, federations tended to ignore road running and 'missed the boat' on the opportunities it offered. This study, a condensed and edited version of a report commissioned by European Athletics, examines the policy issues federations face in regaining market share. Based on desk research, an on-line survey of European Athletics' 50 Member Federations and consultations with experts, it describes the running market's history and major trends, including a second running wave that has now been taking place for more than 10 years in most countries. It identifies the main challenges faced by European Athletics, the federations and athletics clubs and then concludes with a set of recommendations, including working together with existing event organisers and (re)positioning themselves as the 'natural authority' on road running, to ensure they catch the next boat.

AUTHORS

Prof. Dr. Maarten van Bottenberg, holds a chair in Sport Development at the Utrecht School of Governance of Utrecht University.

Prof. Jeroen Scheerder, teaches Sport Policy and Sport Management at the Katholieke Universiteit Leuven in Belgium.

Dr. Paul Hover is a senior researcher at the W.J.H. Mulier Institute in the Netherlands.

Introduction

Since the late 1960s, road running has transformed from competitions between a small number of elite athletes to an activity practiced by millions of people. Today, huge groups of runners and joggers of all ability levels regularly participate in this element of athletics with a variety of goals and motivations other than winning races. Most generally practice their sport alone or in small informal groups. Nevertheless, millions also take part in one or more of the many mass participation road running events, like the city marathons, half-marathons, and shorter runs, such as 10 miles, 10km, 5km or even just 1km. In fact, road runners and joggers are the largest group of athletics participants, but few of

them would consider themselves to be athletes or even a part of the sport of athletics. This is reflected in the fact that only a small proportion of the road runners and joggers in any country is currently affiliated to an athletic club or school and thus to their national athletic federation.

In the first instance, athletic federations in Europe did not realise the potential and opportunities of this growing movement for their organisations. They tended to remain focussed on track and field and high-performance and to neglect the first wave of running and jogging that swept Europe in the 1970s. In the last two decades, however, more and more federations have become aware of the opportunities that road running offers and that they 'missed the boat' the first time around. However, few have figured out how to successfully break into the market, which is currently booming as a second wave of growth is taking place throughout the continent. Manifestly, the federations lack effective strategies, tools and data to regain market share and profit significantly.

Awareness of the opportunities and challenges led European Athletics to explore the potential of mass participation road running in the interest of its 50 Member Federations. It commissioned a study of the market trends that the federations are witnessing in their countries, how they have responded to these trends, and what they can learn from each other.

The project was led and coordinated by Prof Dr Maarten van Bottenburg and carried out between July 2009 and March 2010. It included a web-based survey and was conducted by ISIZ, a specialist in the field of online research, based in Amsterdam. The process was followed and supported by Bill Glad, the Member Services Manager of European Athletics.

The project was guided by the following research questions:

- What are the main trends in the mass participation road running market in Europe?
- What opportunities and challenges do European Athletics' Member Federations face in responding to these trends?

- What management and marketing strategies have been developed by Member Federations and how successful have they been in responding to the trends?
- What can the Member Federations learn from the experiences of each other?

The aim of this report is to build understanding so that European Athletics can best assist its Member Federations in developing well-considered and effective strategies to profit from the further expansion the running market and increase their market shares. In other words, to provide a platform that will help the federations to catch the next boat.

The objectives are to give more insight into:

- the information that European Athletics' Member Federations have on the size 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.

Note: In the study and in this report, road running is 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.'*

Methodology

Desk research

Desk research was carried out to identify (trends in) the running market in Europe. This research was based on literature and internet searches 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 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. Commissioned and financed by the Royal Netherlands Athletic Union (Atletiekunie), it 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 (VAN BOTTENBURG, 2006a, 2006b).

A second research project – carried out 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 10 largest 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 Atletiekunie and the organisations behind the participating running events. The survey was supplemented by in-depth interviews with 25 runners who participated in the Utrecht Marathon of 13 April 2009 (VAN BOTTENBURG & HOVER, 2009).

A third research project – carried out 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 analysed. In addition, journals and monographs taken from the expanding 'running literature', including biographies of the forerunners of the running boom, were studied (SCHEERDER & VAN BOTTENBURG, 2009).

Web-based survey

To answer the research questions about 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 50 European Athletics Member Federations was conducted. 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 federation was invited by e-mail to log onto a special website and complete the survey one time only per federation (to prevent multiple responses from any country). Sent to contacts whose names and e-mail addresses were provided by European Athletics, the e-mail indicated that completion of the survey was considered a condition for payment of the 2010 European Athletics Member Federation Support Programme grant.

The web-survey was opened from 2 October to 11 November 2009. A reminder was sent to those federations that did not respond within three weeks. After closing, two federations sent their answers to the survey questions by email. In consultation with European Athletics, it was decided to include these data in the analysis.

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 in by key figures in the federations, i.e. president, CEO general secretary, general director, international secretary, technical secretary, director of sport development, sports director, etc.

The survey (N=47) therefore provides a representative assessment of trends in Europe according to the federations as well as a representative picture of the policy strategies employed by the federations. As 94% of the fed-

erations completed the same questionnaire, the results can be analysed and compared at a cross-national level.

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, organised 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.

Trends in mass participation road running

The origins of road 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, was not always as self-evident as it seems to be nowadays. Only 40 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; those who started to run in public were often laughed and jeered at. For most people, running was seen as a waste of energy, a frivolous pursuit.

When the 'Running Guru' Dr. George Sheehan picked up running again in the 1960s at the age of 45 years, he began in the privacy of his backyard because running was unheard of for a middle-aged man. Another running pioneer, and the man who introduced aerobics to the world, Dr. Kenneth Cooper, advised those who felt embarrassed about running in public just to walk or to run on a treadmill at home (STOKVIS & 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 or pretend 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, which had been staged since 1897 – and sneaked into the field, finishing as the first woman known to complete the Boston course (SOSIENSKI, 2006). A few years later, number 261 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 teammates prevented them from doing so (DERDEMAN, 1994).



The photographs of this famous moment in the history of running brought the issue of gender equality in road racing to the public. In a period when the second wave of feminism addressed a wide range of 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 us to realise that today's mass participation in road running is a relatively recent development. Switzer, Benoit, Cooper (whose book *Aerobics* was published in 1968), Sheehan (author of the bestseller *Running & Being. The total experience*, published in 1978), James Fixx (author of the bestseller *The Complete Book of Running*, published in 1977), 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 remained a small local event until the 1960s, with only a few hundred participants. Then, the number of participants increased slowly, passing the 1,000 mark in 1968, and the growth 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, when the centennial race attracted a record number of 38,000 (see Figure 1).

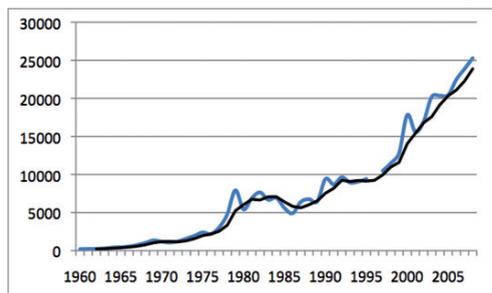


Figure 1: Year-by-year growth in the number of Boston Marathon entrants (1897-2008)

Source: <http://www.bostonmarathon.org/Boston-Marathon/Participation.asp> (excluding the historic 100th running of the Boston Marathon in 1996 attracted a record number of 38,708 official entrants)

Two waves of running

The growth curve of the Boston Marathon was mirrored in Europe and other parts of the world. Worldwide, two 'running waves' can be identified, shown statistically by the develop-

ment of the number of marathons and the development of the number of people participating in these marathons.

The first wave started in the 1960s and accelerated in the late 1970s. This was the time when other cities, including many in Europe started an annual marathon tradition, including 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 again to rise spectacularly, leading to what we call the second wave of running. At the same time, the total number of marathon finishers in Europe also increased significantly (see Figure 2).

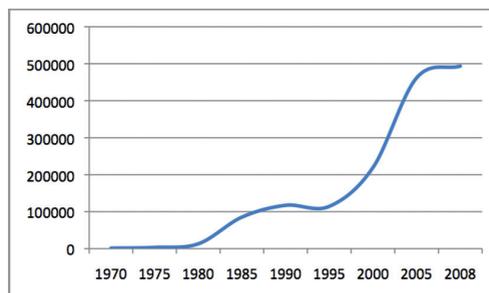


Figure 2: Marathon finishers in Europe, 1970-2005

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

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

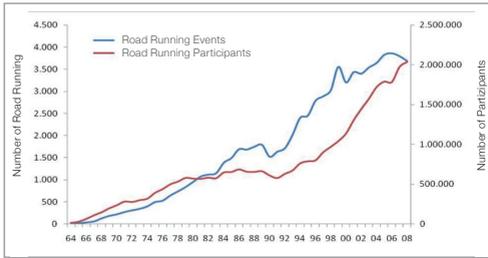


Figure 3: Number of road running events and participants in Germany, 1964-2008

Source: Scheerder & Van Bottenburg 2009.

In Belgian Flanders, the number of people participating in running also multiplied by almost three over the last 10 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).

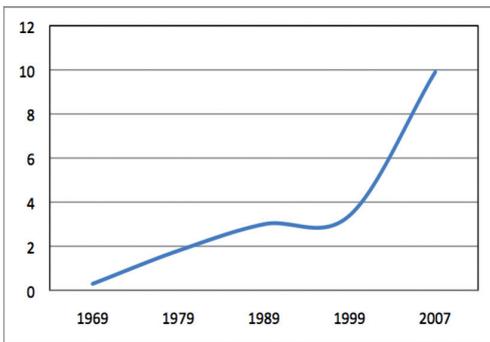


Figure 4: Percentage of the Flemish population (12-75 years) participating in running, 1969-2007

Source: Scheerder 2009.

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 in the last 10 years (see Figure 5). Only three federations (Andorra, Monaco, Ukraine) reported a decrease in the number of people participating in road running in their countries over the last 10 years, while two countries (Gibraltar, Latvia) reported that this number has remained stable. All others Member Federations (i.e. 89%) assessed that

the number of people participating in road running in their country has increased. According to 25 Member Federations (53%), this increase has been slight; the other 17 Member Federations (36%) assessed this increase as substantial.

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 by 460,000 between 2005/2006 and 2007/2008, from 5.0 to 6.1% of the adult population. According to the Active People Survey, the biggest national population survey in Europe, 3.9% participated 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% (about 1.2 million people) in 1999 to 18% (about 2.7 million) in 2007 (Breedveld, Kamphuis & Tiessen-Raaphorst, 2008). Of all people in the Netherlands who considered running as their main sport in 2009, 71% started to practice this sport after 1998 and 51% after 2003 (VAN BOTTENBURG & HOVER, 2009).
- In Germany, the number of participants in road running events increased sharply, from 970,000 in 1998 to over two million in 2008 (information from the Deutscher Leichtathletik-Verband).

With respect to the trend in road running events, 32 Member Federations (68%) reported that the number is increasing in their countries, while 14 Member Federations (30%) described the trend in running events as stable, and only one (2%) assessed the trend as slightly decreasing (see Figure 6).

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

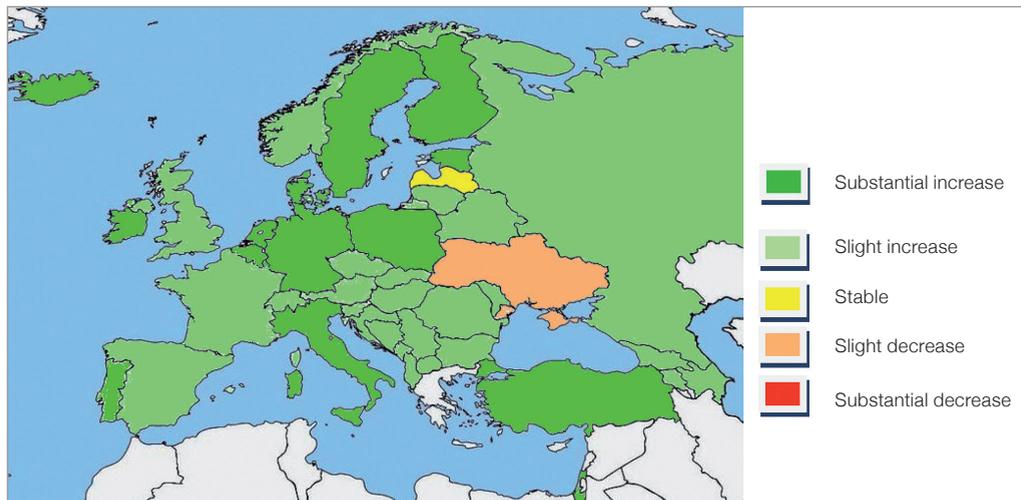


Figure 5: Assessment by Member Federations of the trend in road running in their countries

Source: Mass Participation Events Questionnaire (2009)

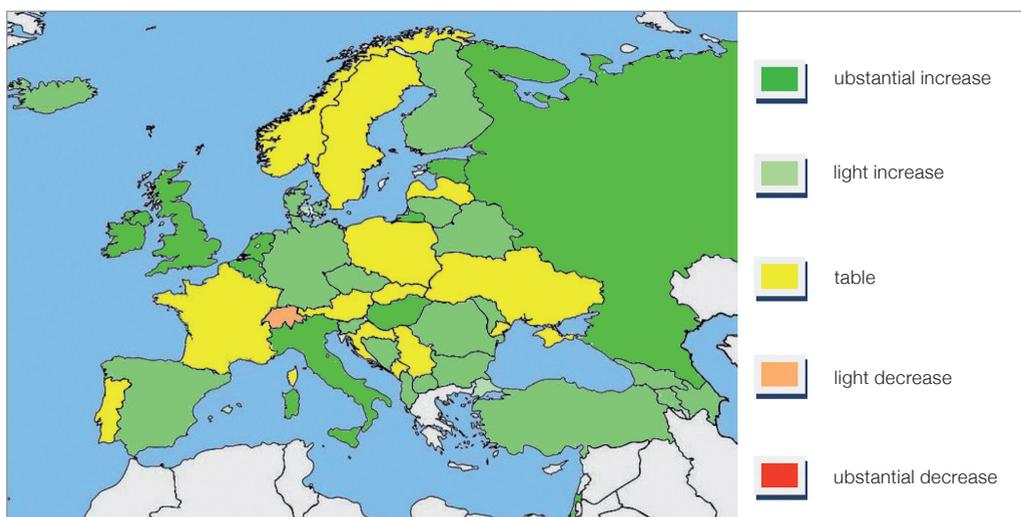


Figure 6: Assessment by Member Federations of the trend in road running events in their countries

Source: Mass Participation Events Questionnaire (2009)

From competing to completing

Many pioneers of the first wave were former track athletes, who had stopped running after they left school or college but picked up running again, possibly after years at sedentary jobs with a high pressure of work in high-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 wanted to change their sedentary lifestyle and its culture of dining, smoking, and drinking (STOKVIS & 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 & HILLVOORDE, 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 (or picked it up 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 wave, which started in the late 1990s, when new and larger groups of people took up running and jogging. Compared to the first 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, a similar trend can be seen.

At the same time, the average age of marathon runners increased from 33 in 1980 to 39 in 2007. Today, both in the Netherlands and the United Kingdom, 60% of all participants in running events are between 30 and 55 years of age; with female runners on average four years younger than male runners (Netherlands: VAN BOTTENBURG & HOVER, 2009; UK: Active People Survey 2007/08). In general, these middle-aged runners lead active lives; most of them are employed and have families. Therefore, they can be expected to see flexibility as one of the main advantages of running over other sports. We do know that the majority does not run or jog as a member of a club, school or other type of formal 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 who led the first running wave: 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 that 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 that 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 organisers of road running events seem to have anticipated this trend. Today, they organise 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 want to take part in a mass participation event. To facilitate these people, several road running event organisers have expanded or abolished the time limits of their races. Moreover, they have introduced new race distances, like the ten miles, 15km, 10km, 5km, and even 1km, and have developed new events to differentiate between target groups, like the introduction of business runs, women's runs and kids' runs.

Declining market shares of athletics federations

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 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).

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-known ²
Athletic club	23		22	6	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)

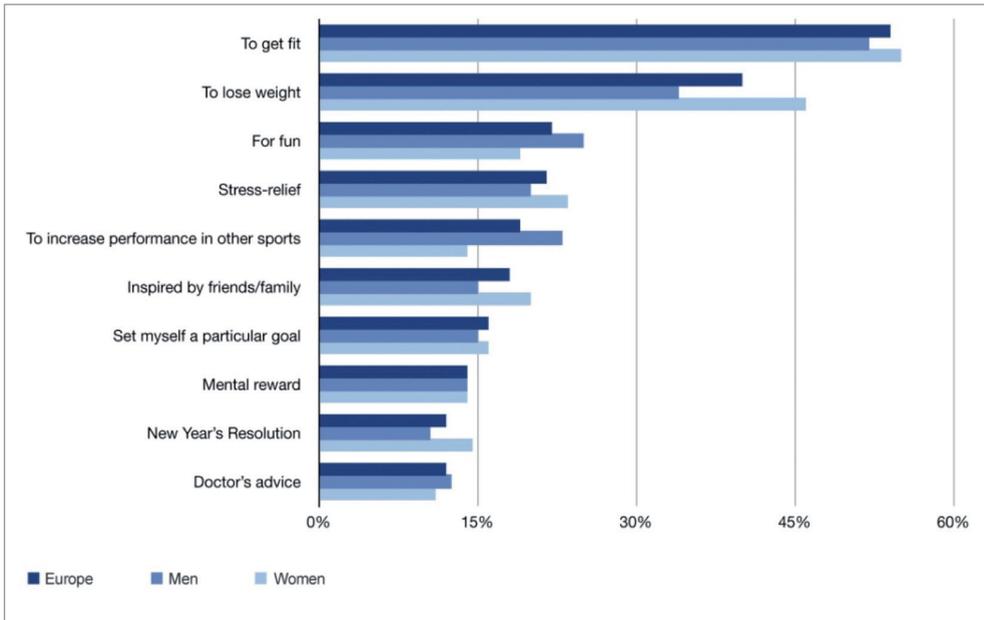


Figure 7: Reasons to run for people in eight western European countries (2008)

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

- 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 of the federation grew 7% from 1998 to 2008, while the number of participants in road running events increased 110%, 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, including running or jogging, increased 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 six years old 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 competitions on main roads and cross-country and more than a million 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. This is 5% of those who said they had participated in athletics (including running) in the last four weeks. In addition, there were 520,000 people who had taken part in organised competition in athletics in the previous twelve months. Another 2 million had participated in athletics in the previous four weeks, without taking part in competitions.
- According to the athletic federation of Iceland, which has a total population of 330,000, about two thirds of the total number of runners (estimated at 15,000) are not formally linked to the federation; in part because the Constitution of the National Olympic and Sports Association of Iceland does not allow for the inclusion of those unaffiliated to a club into the system.
- The Vlaamse Atletiekliga (VAL), the Flemish athletics federation in Belgium, counted 40,000 members in 2007, which was less than 10% 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 in Belgium (see Figure 8).

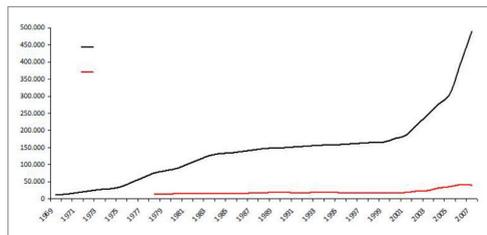


Figure 8: Number of people in Flanders who participated in athletics, running and jogging (1969-2007) and were active members of the VAL (1978-2007)

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 here 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 be increasing 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, the 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.

Athletic Federation Policy

Main policy issues

Many of European Athletics' Member Federations maintained their traditional focus on track and field and high-performance sport throughout the 1970s and 1980s while neglecting 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. However, they often find themselves in a disadvantageous position to control the mass participation running event market and profit from its growth; at least compared to a small number of federations that got involved themselves (or through affiliated groups of clubs and districts) in organising road running events at an earlier stage.

Thus, it will hardly come as a surprise that the main policy issues of the federations with respect to the development of the road running market are primarily to organise 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 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
Organisation 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 federations say they cooperate with road running event organisers and national and local governments. About half of the 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 organisations to promote road running in their country.

	Yes	No	n.a.
Road running event organisers	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 Confederation	51%	34%	15%

Policy changes

Sixty percent (28 out of 47) of European Athletics' Member Federations responding to the Mass Participation Events Questionnaire say that they have changed their policies over the last 10 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 programme for walking and running with the support of the government and local authorities. In Hungary, the athletic federation began promoting road running about 10 years ago and established good relations with the private entities that had filled the gap and occupied the road running market.

Results related to policy initiatives suggested in the survey are follows:

Introducing new membership categories:

For 21 of the 28 federations who have changed policy, change meant among other things the introduction of new categories or types of membership; seven introduced these new categories at the club level, three did so at the federation level, and 11 at both the club and the federation level. The German athletic feder-

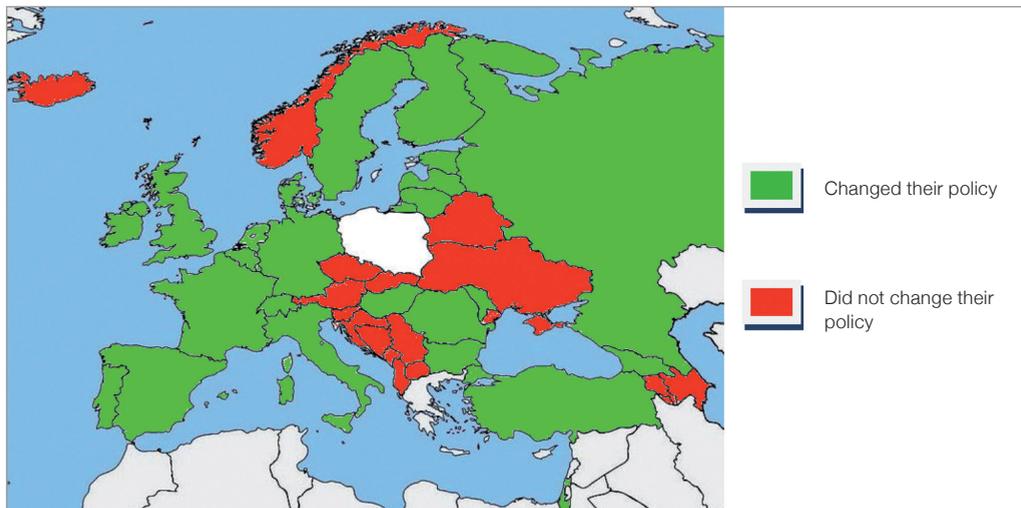


Figure 9: Change of policy by European Athletics' Member Federations in anticipation of – or in reaction to – changes in the road running market

Source: Mass Participation Events Questionnaire (2009).

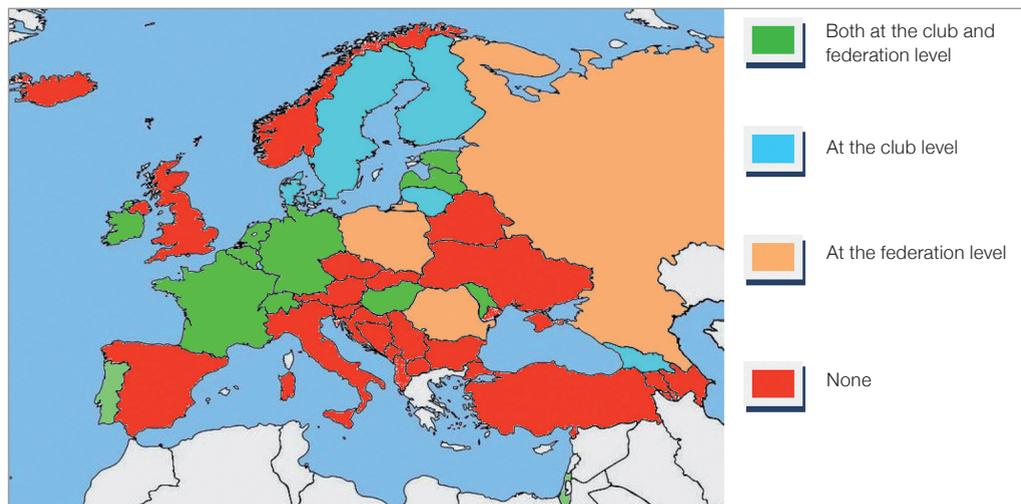


Figure 10: Introduction of new categories or types of membership for people interested in road running by European Athletics Member Federations

ation, 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 federa-

tion endorsed a 'Start to Run'-programme and introduced a new 'light' membership category (Dutch Runners) to include runners and joggers into the federation. In contrast, there were 26 federations that did not introduce new categories or types of membership (see Figure 10).

Improving relations with event organisers:

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

As Figure 11 shows, there are a few countries (coloured blue) where the federation organises the most popular road running events - Finland, Romania, Georgia, Gibraltar, Monaco – and some other countries (coloured green) where the relationship between the athletics federation and other organisations 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 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 federations and the road running event organisers is good, most federations indicate that they are actively striving to change this relationship (coloured green in Figure 11). 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 organises the most popular road running events (coloured blue) or because the relationship is already characterised as very good (coloured yellow).

Getting more and better data: In the Mass Participation Events Questionnaire all federations were asked what kind of data they have on the road running market (trends) in their country. On the basis of 10 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

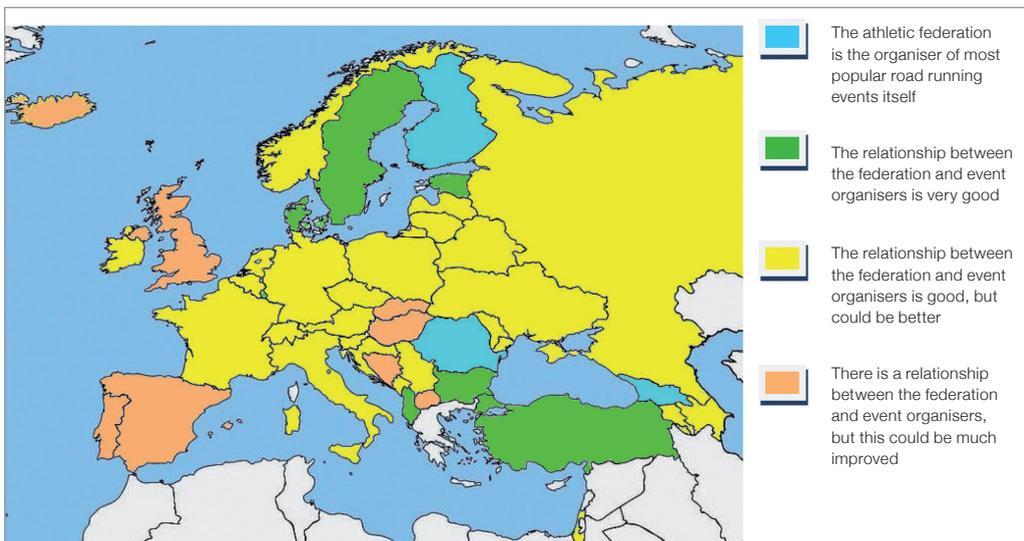


Figure 11: Characterisation by the Member Federations of their relationship with other organisations that are in charge of popular mass participation road running events

data would score 0 points. The results of this analysis show that only a few 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 12).

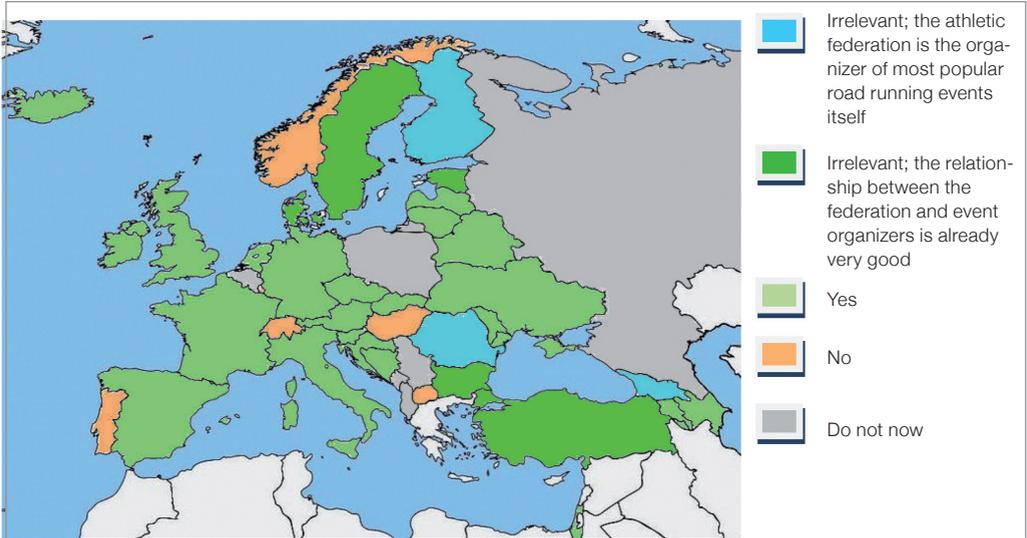


Figure 11: Are Member Federations actively striving to change the relationship with other organizations that are in charge of popular mass participation road running events?

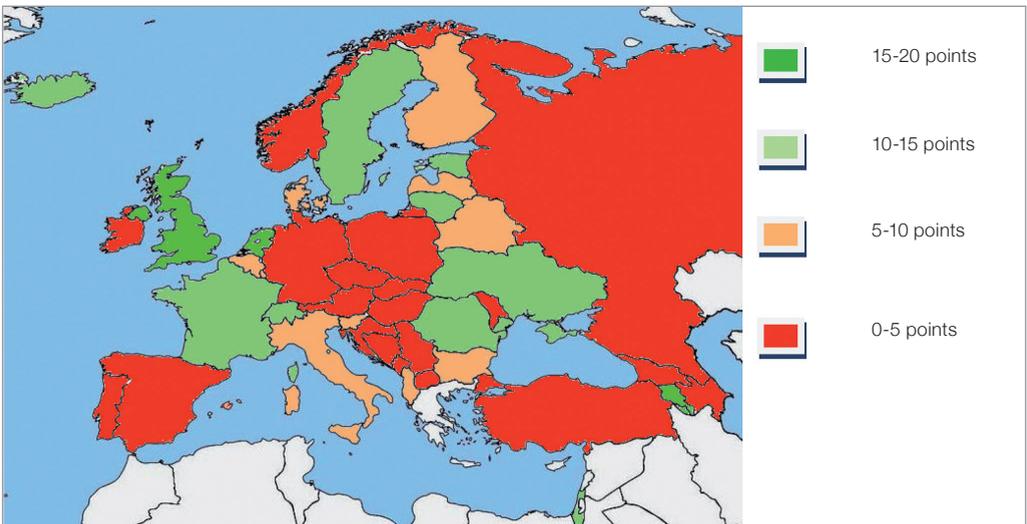


Figure 12: Assessment of data management by European Athletics' Member Federations based on computed data management scale (minimum score = 0, maximum score = 20).

Figure 13 shows that most federations see the need for improving this situation. At least, 44 out of 47 indicated 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 federations that currently only have poor market data at their disposal (see Figure 13).

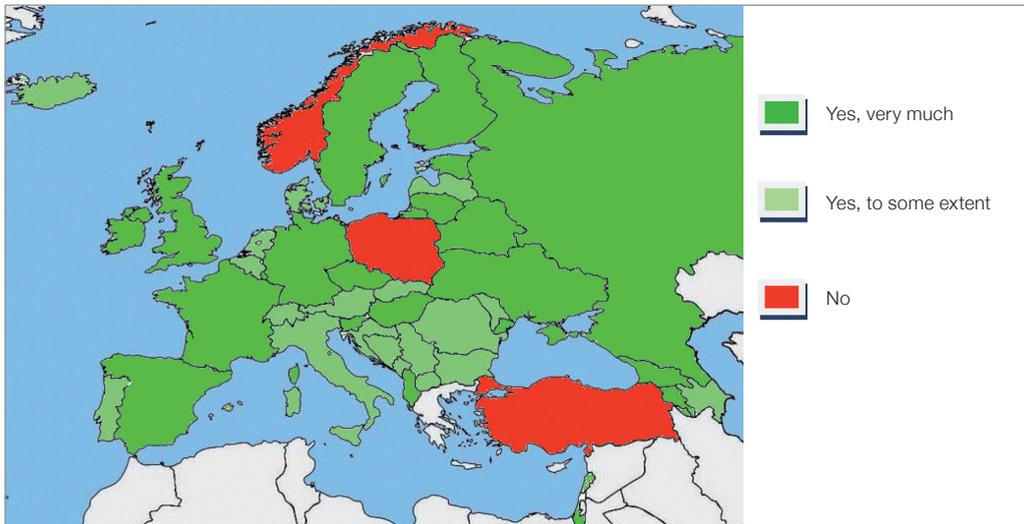


Figure 13: Does the Member Federation of European Athletics attached importance to getting more and better data on the mass participation road running market in their country?

Conclusions

It has become evident from this study that the mass participation road running market is rapidly expanding throughout Europe as a second wave of running, which started in the late 1990s, draws in more and more participants. Compared to the first wave, the new runners are from a wider variety of social groups and they have a wider variety of goals and motivations for participating.

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 through an increase in club and/or federation membership numbers. Their main problem is that during the first wave of running they focused too long on track and field and high-performance sport, without presenting themselves as the 'natural authority' of road running. As a consequence

of this policy, they 'missed the boat' and most federations are now confronted with other entities that act as organisers of mass participation running events.

Most of these event organisers operate outside the traditional organisational structure of the sport. Importantly, they are attracting an increasing number of participants, while the federations only show a modest increase in their membership numbers. It can be concluded, in other words, that the market share of European Athletics' 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 in which 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 organisers.

Moreover, it is proving to be difficult to tempt individual runners and joggers to take up a club or federation membership. These runners and joggers are not dependent on the athletic club's venues and facilities, on the instructions of their trainers and coaches, or on their official competitions. They can run whenever and wherever they like. They can surf the Internet to look for information on training schemes, running shoes and running clothes. And if they would like to, they can enter a very well organised running event almost every weekend without being affiliated to a traditional organisation.

The challenges, therefore, are (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 organisers 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 federations are striving to get control of main running events, to create multi beneficial relationships with running event organisers, 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. as an indispensable organisation 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.

Recommendations

To take advantage of the opportunities with regard to road running and road running events and further improve their position, European Athletics and its Member Federations need to adjust their policy strategies. Our recommendations for doing so are structured around the three challenges identified in our conclusions.

The first challenge mentioned is for the federations to get to know the background, needs and objectives of the growing ranks of runners and joggers. This calls 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. 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 entering the running market. Data is required 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 federations already possess such data, but almost all recognise that it is in their interest and attach importance - at least to some extent - to getting more and better data on the mass participation road running market. The United Kingdom and the Netherlands offer examples of good practice in this respect.

The second challenge is to adapt and innovate the standard range of products and services offered by the athletic clubs and federations so they can become more competitive and better meet the needs of runners and joggers. Again, it is in the interest of both to do so as it is the key to increasing membership. The strategy in this area requires innovation and creativity. In consultation with its Member Federations, European Athletics should promote - and possibly facilitate - product development based on market data and analysis of 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. This calls for categories and service packages with 'light' forms of social and institutional bonding and high flexibility. Such a strategy will also require a change in the culture and structure of athletics and a new perspective on the function and role of the athletic clubs and athletics federations with regard to the growing running community. Countries like Germany, Ireland and the Netherlands offer several examples of good practice 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 process should be monitored closely by European Athletics, in order to avoid a situation in which each federation is re-inventing the wheel.

The third challenge is to improve the relationships with the road running industry and road running event organisers. The aim should be to collaborate with them on promoting running as a sport integral to athletics and providing the added value of an athletic club or federation membership. This points to the importance of a changed attitude on the part of the federations towards more and better collaboration, communication and marketing. Most federations have indicated that they would indeed like to improve their relationship with both the running industry and the road running event organisers. However, their experiences show that it is by no means an easy job to do so. This process must start with respect, and an approach of giving rather than taking. A better atmosphere needs to be created to open a running dialogue with the industry, calling for diplomacy and good will from both sides. As a next step, the running event organisers could be stimulated to organise themselves in a committee or other body and be represented in the General Assembly or a road running

committee of athletic federations. Examples of good practices in this respect can be found in Sweden, Denmark, Estonia, Luxembourg, Bulgaria, and Turkey, while the 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 organisers. Here too, European Athletics should collect these examples, monitor them and evaluate the improvements made in this respect.

Finally, it is to be recommended that both European Athletics and its Member Federations focus on jointly becoming the 'natural authority' on road running and road running events. In consultation with its federations, European Athletics should elaborate a coherent strategy in this direction. Above all, this will mean defining and redefining added value; both to the road running industry and event organisers and the individual road running participants. To inspire confidence as the 'natural authority', the sport's traditional organisations should make clear that they not only want to profit from the growing road running industry, but also and primarily because of the wish to add 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 can be an important weapon in the battle against obesity, heart and vascular diseases and other maladies associated with a sedentary lifestyle, and a way to reduce the related healthcare costs. It is indeed of high public interest that the European Athletics and its Member Federations don't miss the next boat!

Please send all correspondence to:

Prof. Dr. Maarten van Bottenburg

*Utrecht School of Governance of
Utrecht University*

m.vanBottenburg@uu.nl

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