



RUNDAY 2021

UKRAINIAN RUNNING MARKET REPORT

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INTRODUCTION

Recreational running and jogging are increasingly popular in Ukraine, and as a result the number of races, marathons and time trials being organised is increasing every year.

However, despite the boom in runner numbers, the market for amateur and recreational sports events is relatively young and underdeveloped. Beyond a handful of well-known marathons which are organised together with large sponsors, there are very few competitive events or local less-competitive 'community' style races such as parkrun (UK) and Runday (UA).

By interviewing a cross-section of event organisers, this report examines how existing race and event organisers are working, what motivates them, what challenges they face, and how organisations like Runday can improve the situation to get more people running, and increase the running and sports tourism markets.

The research is based on a series of in-depth semi-structured interviews conducted with 15 race organisers from 7 different cities in Ukraine.

- 60% of respondents are organising weekly running events in one specific city with up to 100 runners
- 40% are involved in organising large races with up to 16,000 runners in different Ukrainian cities.
- 6.6% of the respondents are female and 93.4% male.
- 46.6% of respondents are based in Kyiv.
- the average number of events organised by respondents in the sample group is 61 races/events.

MEASURING PROGRESS

The last 5 years has seen a rapid growth in the running market in Ukraine. In 2015 there were under 4,000 runners participating in the largest marathon in Kyiv. By 2019 the number of participants at the same event had increased by approximately 420% - there were 16,800 runners.

The market started to grow actively in about 2015, after Ukraine's Maidan revolution, when running became more popular and a fashionable way to spend free time. Bloggers and other influencers also started promoting running and healthy lifestyles, and people started joining running movements and clubs.

"Now my job promoting running is much easier - because running is seen as a cool and fashionable thing to do - all the bloggers and influencers are constantly promoting healthy lifestyles"

As runners started to join clubs, most of them set personal goals like an example, running 10 kilometres or a half-marathon, and they work with coaches, trainers, or running clubs to achieve these goals.

With time, running in smaller regional cities gained popularity - lots of towns opened their first running clubs and held their first races. With new opportunities and new events taking place across the country, athletes started travelling to run and 'sports tourism' started to develop. By 2017 runners started actively looking for trips, where they can attend running events and visit new places at the same time. In the same year, when Ukraine signed a visa-free travel agreement with the European Union, additional barriers for attending international races were removed. As a result, many more athletes from Ukraine started going abroad to attend marathons and other events and experience the more developed running and recreational sports markets in Europe.

Since 2019 an increasing number of large events like triathlon and trail runs have been organised and are becoming more popular.

IMPACT OF COVID-19

COVID-19 had a dramatic impact on the running market in Ukraine. The majority of races and events were cancelled, some of them moved online. Our respondents explained, that this caused many people to stop training and lose motivation, as their main motivation was to train for a specific race.

Many professional race organisers had to quit their jobs and move to other more stable industries.

ORGANISERS

This section is based on a series of in depth interviews with race and event organisers in Ukraine. Some of the respondents were volunteers who organise free weekly 'community' races with Runday, and others organise commercial events.

01. MOTIVATION

We identified that the majority of organisers are motivated to contribute to their community and change the lives of their runners: better diet, lifestyle, and better quality of leisure time.

They also aim to impact people's behavior and mindset - to grow the running market in Ukraine and have a better and healthier country. Fundraising events are also becoming more popular, and we believe this is one of the areas that have great potential for growth.

02. RUNDAY PLATFORM FEEDBACK

53.5% of respondents are currently organising free events on the Runday platform. They are usually holding small to medium events of up to 100 people.

They are using their organiser dashboard the most. The organisers are generally satisfied with the existing technologies, but they would like to be able to edit their results table after uploading race results, see more statistics from events (like the number of new runners, runners statistics and progress, list of runners attending a specific event, those who achieved a "personal best" or other badges achieved during the event). They also mentioned that the "team" functionality on the existing Runday platform is very useful, and they would like it to be improved by adding "Team calculator".

03. PAID EVENTS

80% of organisers, who are using Runday platform currently say that they would be willing to organise paid events on Runday platform.

They estimate that it will be 1 paid event once per 1-2 months with approximately 300 runners.

They also mentioned that those the absolutely essential things to have on the platform:

- List of registered participants
- Integration with other timing solutions
- Fast results uploading (so they can identify winners straight after the event and give them prizes)

They also said that they would prefer to have a basic free system and then buy additional features (like timing solution, e-mail communications, etc) additionally, rather than paying for using the platform.

04. COMPETITION AND EXISTING TECHNOLOGIES

The early adopters that will more likely switch to Runday platform after its release are organising community events.

They are mostly using a timer on their smartphones for tracking race results, and they use Facebook for all the communications, events listings and results listings, etc. They also have the ambition to organise paid events.

Paid event organisers are usually using Ukrainian platforms - so they can speak the same language and resolve the problems quickly. If they have enough resources, they build their own websites, so they can control their database, easily edit runner information, use IP telephony, CRM systems, and sell merchandise on their website.

Usually, the platform providers ensure that: runners receive an email receipt after paying for tickets and use these emails to get their start numbers on the event day. The majority of organisers said that they want to have their own runner database or have access to a wide range of dedicated runners to promote their events.

The merchandise market in Ukraine is very competitive.

Event organisers often try to reduce their costs, comparing different suppliers and ordering the products with the lowest price.

Large event organisers usually negotiate lower prices by having a high volume, or they just find partners, that can provide free merchandise for their events.

So, at the moment on-platform merchandise does not seem to have a high perspective as an additional revenue stream. However, partnering with one of the merchandise providers in the country to provide a t-shirt for runners is a great way to increase consumer satisfaction, the number of returning consumers and brand awareness.

The running market in Ukraine is growing rapidly, and it has great potential for the next 10 years. As we have identified, events, races and recreational running is still in its infancy outside of Ukraine's major cities, offering huge potential for growth. Running is an increasingly popular trend and "upper-class activity" - as it was in Europe in 1970s.

CONCLUSION

POPULARITY

A number of influencers promote healthy lifestyles as well as regular running, and it creates a demand for running events, which in turn affects the supply. The number of race organisers and events is growing rapidly.

COVID-19 IMPACT

The global COVID pandemic in 2021 had a negative short-term impact on races and recreational running, however, its impact on people's health and social life means the demand for community running events is likely to be strong as life returns to normal and social restrictions are lifted. We also expect to see a strong rebound in sports tourism.

THE MARKET

In Ukraine, the event/race market is still relatively small, there are very few race event listing platforms. Their main target consumer is usually marathon organisers - not those who are organising small community events. They charge high fees, which pushes away organisers of free events and fun runs. It creates a huge gap and high entry barriers for new race organizers.

ORGANISERS

The organisers prefer to work with local service providers, also as the market is fairly competitive, they are ready to spend extra time to keep their costs low - but this will not last long - the quality and creativity competition is expected to increase.