

Sports Fundraising Market Snapshot



As an agency that specialises in mass participation and fundraising we're passionate about giving our clients the best market insight possible.

We recently worked with a cohort of 30 of the UK's biggest charities and our data partner justcharity.org to produce The Sports Fundraising Monitor, an in-depth report on the state of the UK sports fundraising market. This summary report gives a snapshot of what we discovered, which we think are the 25 most successful sports fundraising events in the UK* and based on our findings what we expect to see happening in the market over the next 12 months. If you'd like to find out more, drop us a line at: hello@wearemassive.co.uk

Which are the most important events for fundraisers?

We estimate that the 25 most successful sports fundraising events in the UK, collectively enabled charities to fundraise over £120M in 2016. This was a 3% increase on the amount raised in the previous 12 months. Whilst the 25 is dominated by running events, MOB events are represented by Tough Mudder, with 3 in the top 25, and trekking and walking make appearances through The South Coast Challenge and the Thames Path Challenge. Overall we estimate that of the 25, 12 saw an increase in fundraising, five held steady and eight saw falls in the fundraising income raised through them last year.

1	Virgin London Marathon	Run	UP
2	Great North Run	Run	HOLD
3	Prudential RideLondon	Cycle	DOWN
4	Royal Parks Half Marathon	Run	UP
5	Brighton Marathon Weekend	Run	UP
6	Edinburgh Marathon Festival	Run	UP
7	Great Manchester Run	Run	DOWN
8	Asics Greater Manchester Marathon	Run	UP
9	Thames Path Challenge	Trek	HOLD
10	Vitality British 10k	Run	DOWN
11	Vitality Bath Half Marathon	Run	DOWN
12	Great Birmingham Run	Run	DOWN
13	Great South Run	Run	DOWN
14	Tough Mudder London West	MOB	UP

15	Bank of Scotland Great Scottish Run	Run	HOLD
16	Vitality Reading Half Marathon	Run	HOLD
17	Deep River Rock Belfast Marathon	Run	DOWN
18	Brighton Half Marathon	Run	UP
19	South Coast Challenge	Trek	UP
20	Tough Mudder London South	MOB	UP
21	Vitality Run Hackney Half Marathon	Run	HOLD
22	Bupa London 10	Run	DOWN
23	Tough Mudder Midlands	MOB	UP
24	Great North Swim	Swim	UP
25	Bournemouth Marathon Festival	Run	UP

Fastest Growers:



3 events in particular have grown fundraising by a significant amount in 2016.

What trends are we seeing?

The market is growing

We have seen the overall amount raised from sports fundraising events in the UK rise in the 12 months to the end of 2016. Across online giving pages from all sports events we looked at we saw an increase of 11% in 2016, an increase on the 6% growth we reported in 2015.

Average values are increasing

Whilst not true for every activity, overall average values were up on the last 12 months by 9%.

In an encouraging change to what we saw in 2015, average fundraiser values have risen faster than participation levels meaning overall growth was driven by an increase in value and not by simply recruiting more volume.

Increased competition

With the recent shake up of fundraising regulations and the impact on data permissions, increasingly charities are looking to invest in and grow income from mass participation events and sports fundraising. We're already seeing early signs of an increasing gap between bigger and smaller charity brands and we only expect competition for participants to increase as more charities enter the market.

Mud is still good

Last year we forecast income from MOB events would continue to grow. In 2016 the rate of growth has slowed significantly from 2015 but it is still the fastest growing activity we're seeing with overall income increasing by more than 15% across the market. However, as we expected, the rapid rise in the number of events and participants has meant that MOB events are bucking the value trend, with average values falling by up to 10%.

So what next for sports fundraising events?

Continued growth?

The fitness and wellbeing market appears to be on a rising trajectory. We are seeing increasing pressure from charities, social movements and the government to increase physical activity. The recent release of Sport England's Active Nation sports strategy and the largest ever investment in tackling inactivity, all suggest we will see continued growth in the market and we expect to see the number of events out there increase again in 2017.

Events becoming increasingly diverse

As fitness and wellness becomes more aspirational and experiential interactions with brands become the norm, we expect to see more diversity in the types of events being offered. Whilst there are not yet any big third party players in the virtual market, smaller companies are starting to offer virtual events with charity places and we expect to see these grow in the next few years.

A slowing in growth of average values?

While improvements in how charities communicate the impact of fundraisers activities and better stewardship will have played a part in increasing average fundraising values, the external economy will also have played a role in this trend. As disposable incomes come under pressure we expect to see at least a slowing in the level of increase in average fundraising values, but barring any major financial shocks in the rest of the year we still think income will grow.

Overall we're optimistic for this year and we expect to be reporting an overall increase in income again in 2017. We're looking forward to seeing how the charities and events we work with can capitalise on this growth. In the meantime if you want to know more about the events market or how we can help events work harder for you, get in touch.



*Our definition of sports events only includes events based around physical activities and those which are open to any charity, so this excluded all events that are owned or associated with a single or small group of charities such as Race for Life or Moonwalk.

Fundraising data is based on figures supplied by our data partner justcharity.org who provide data from Just Giving, BTmydonate, Virgin Money Giving, Everyday Hero, Classy, Crowdrise and GoFundraise. We have considered only UK pages and annual totals are based only on pages that received their first donation and last donation between January 1st 2015 & April 1st 2016 for 2015 and one year later for 2016 figures.