

RECREATIONAL RUNNING CONSUMER RESEARCH STUDY

NIELSEN SPORTS

April 2021



**WORLD
ATHLETICS™**

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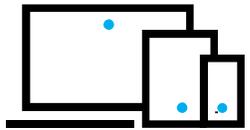
WORLD ATHLETICS & NIELSEN SPORTS RECREATIONAL RUNNING STUDY



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METHODOLOGY



- Fieldwork was conducted using an online methodology
- Data is based on 8414 interviews collected across 10 countries:
 - Australia, Colombia, France, India, Japan, Kenya, Mexico, South Africa, UK, USA
- Data collected between 26th March – 15th April 2021

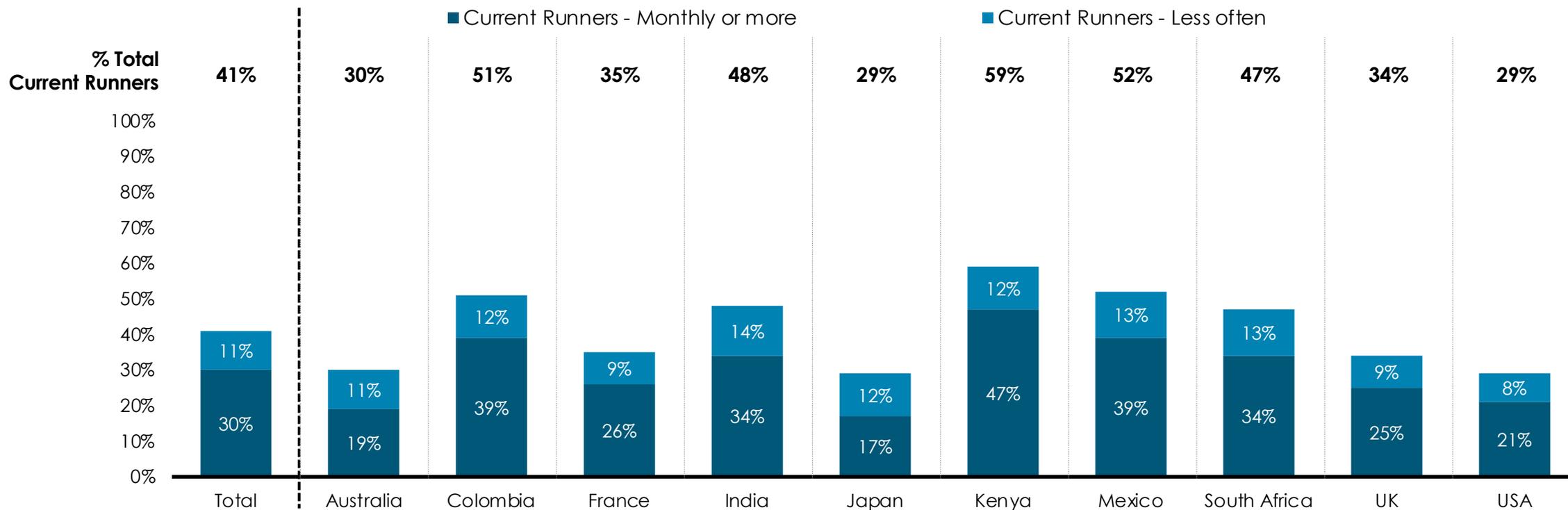
SAMPLE GROUP



- 500 nationally representative respondents per country
 - Representative on age / gender & region
- In addition to this we collected 500 people who run once or per month or more in each country

HIGH LEVELS OF RUNNING PARTICIPATION

- Across the ten surveyed markets, 4 in 10 people consider themselves to be runners.
- 30 per cent of those run at least once a week.



Q: Which particular sports or activities do you do / play at least once a month in season?

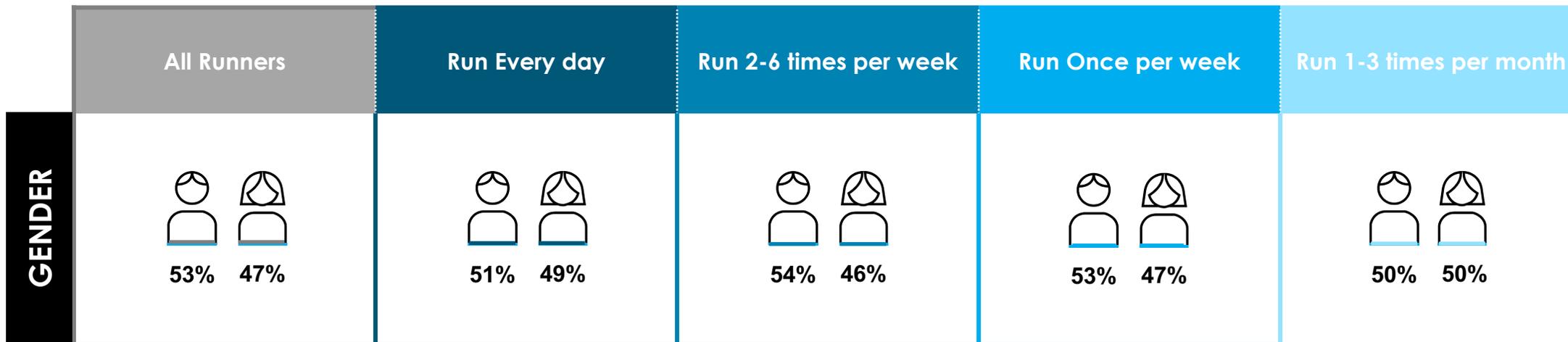
Q: And how often do you take part in running or jogging?

Q: In the past, have you ever taken part in running or jogging?

Base size: n=500 nationally representative respondents per country

A SPORT EQUALLY APPEALING TO BOTH GENDERS

- Distinct from other participation sports, recreational running has an equal participation split. Of all runners, 53% are men and 47% are women
- Males and Females are equally represented across all running frequency groups

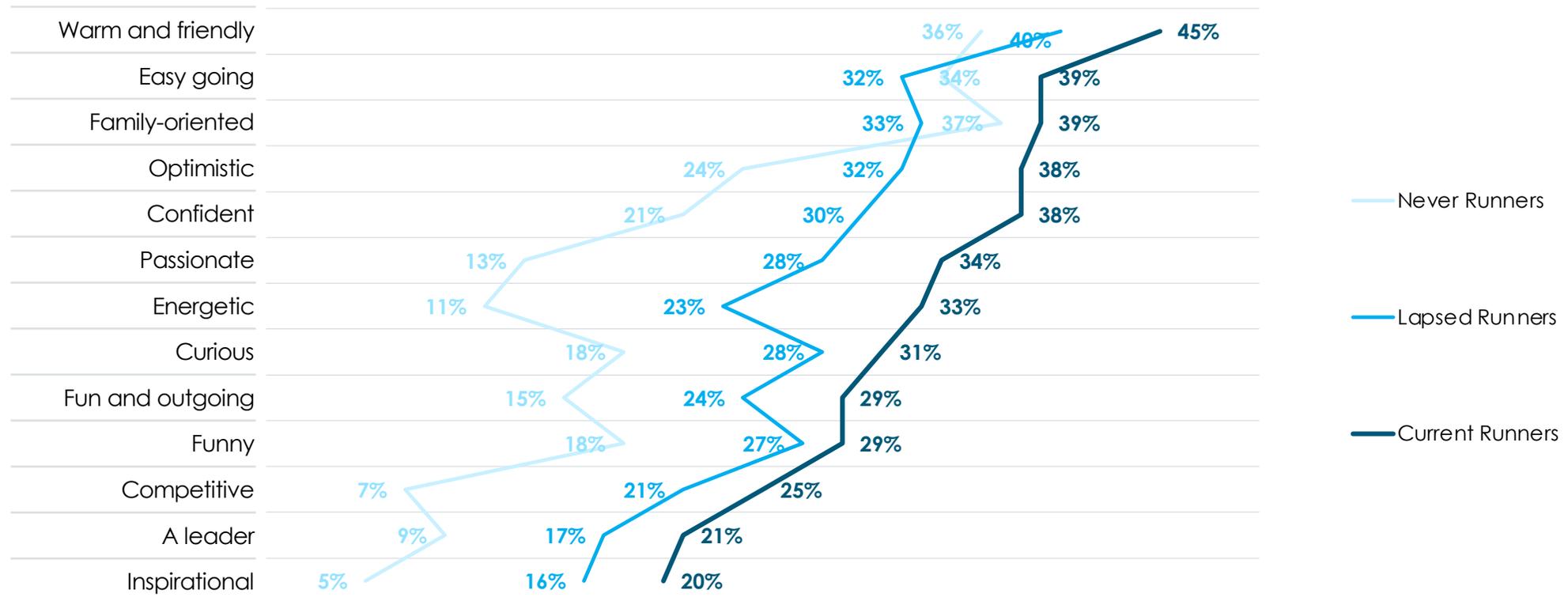


Q: Please indicate your gender

Base size: Gen Pop (5000) Current Runners (5488) Every day (1157) 2-6 times per week (2898) Once per week (709) 1-3 times per month (236) Less often (488)

RUNNERS ARE POSITIVE PEOPLE

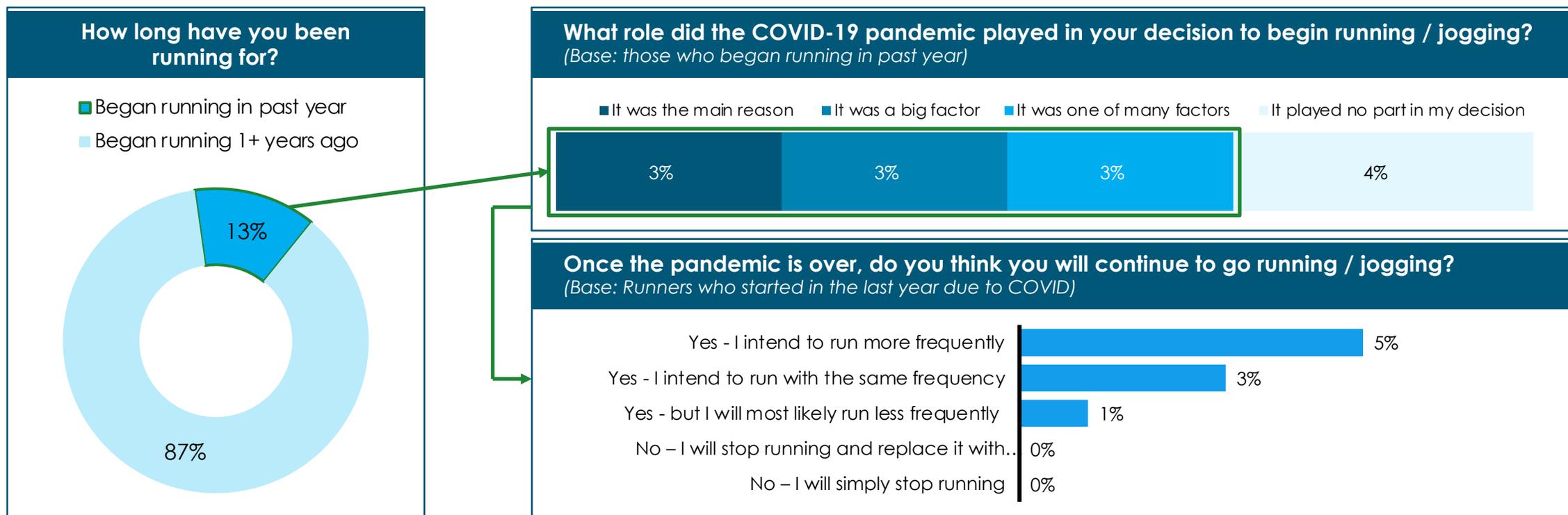
- Runners show greater confidence to associate themselves with positive personality characteristics
- They are more likely to consider themselves to be warm and friendly, family oriented, optimistic and passionate



Q: Which of the following characteristics would you use to describe yourself?
 Base size: Gen Pop (5000) Never Runners (1033) Lapsed Runners (1893) Current Runners (5488)

COVID IMPACT ON RUNNING

- 13% of all runners began in the past year (since April 2020), the majority of whom (9% of all runners) say that COVID-19 played at least some part in their decision.
- All OF this group (9% of all runners) intend to carry on running once the pandemic is over.



Q: How long have you been running for?

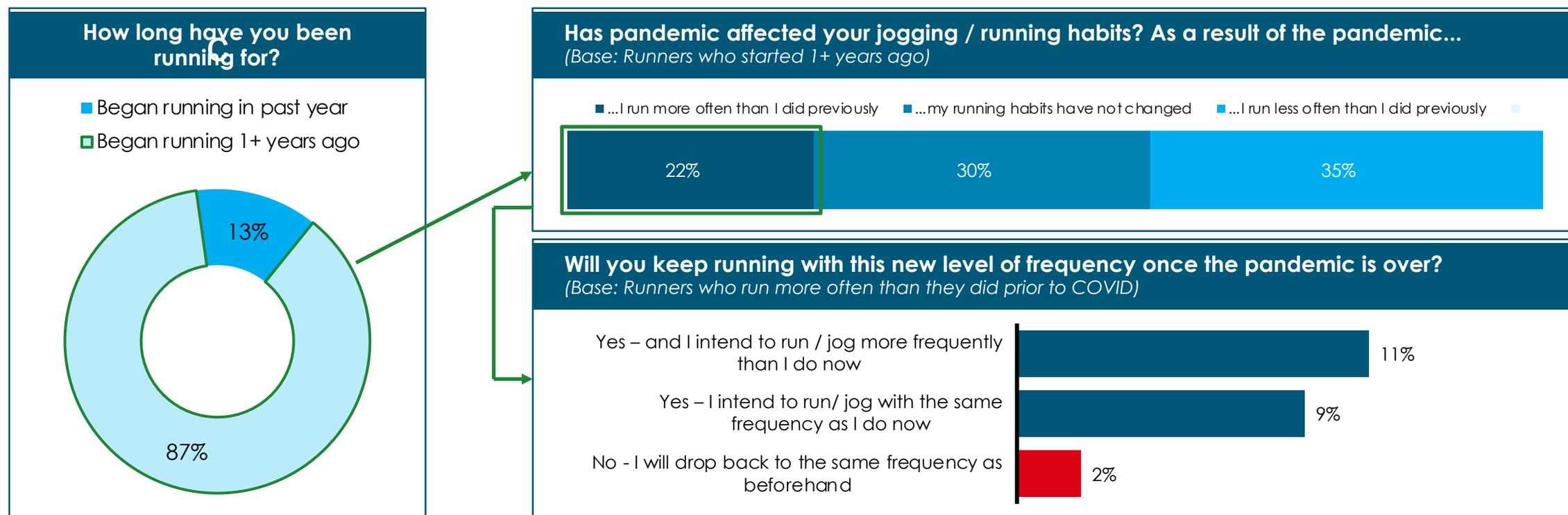
Q: You mentioned that you began running in the last year. What role would you say the COVID-19 pandemic played in your decision to begin running / jogging?

Q: Once the pandemic is over, do you think that you will continue to go running / jogging?

Base size: Current Runners (5488) Runners who started in the last year (728) Runners who started in the last year due to COVID (534)

COVID IMPACT ON RUNNING

- Over a fifth (22%) of all runners claim to run more often than they did previously as a result of COVID-19
- And most of this group (20%) will continue to run more often once the pandemic is over



Q: How long have you been running for?

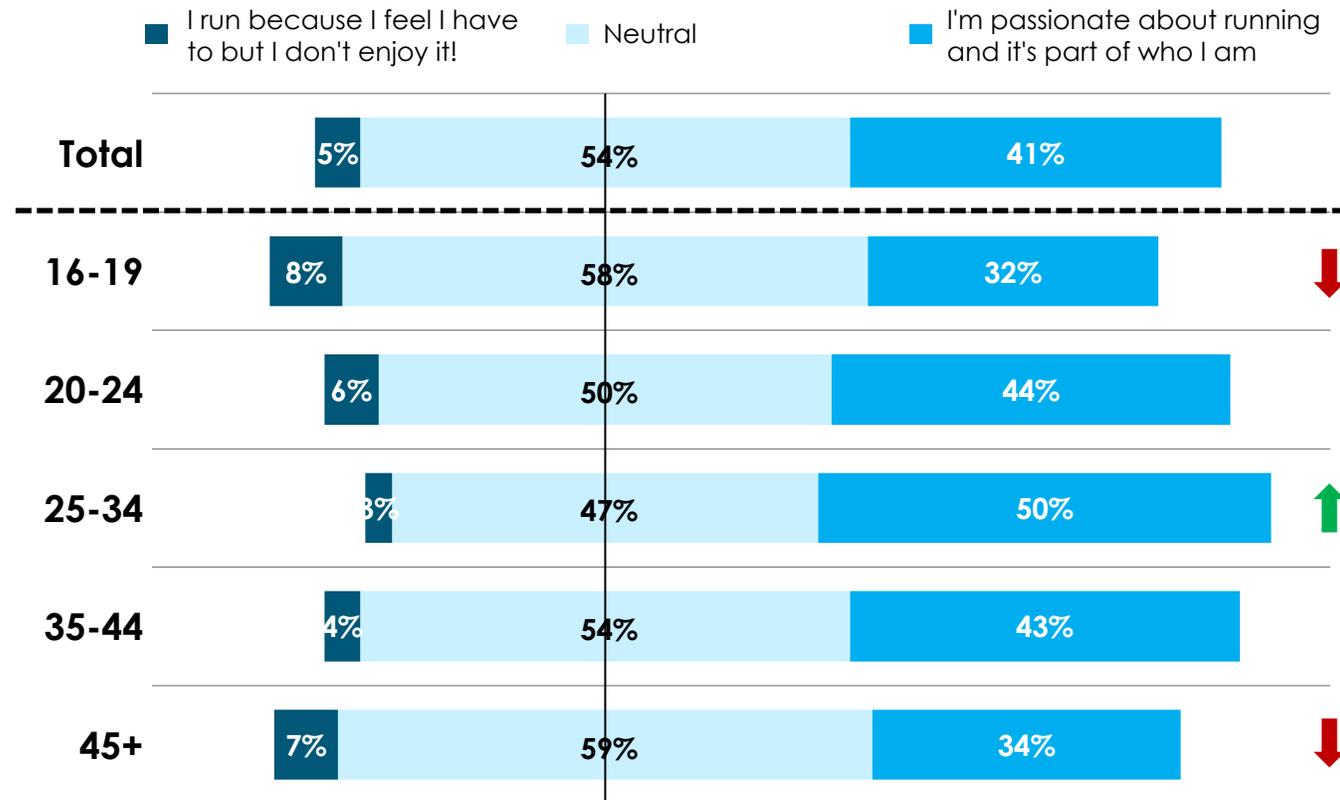
Q: Has the COVID-19 pandemic affected your jogging / running habits in any way? As a result of the pandemic...

Q: You mentioned that you run more often than you did previously as a result of the COVID-19 pandemic. Do you think you will keep running with this new level of frequency once the pandemic is over?

Base size: Current Runners (5488) Runners who started 1+ years ago (4954) Runners who run more often than prior to COVID (1221)

THOSE AGED 25-34 ARE MOST LIKELY TO BE PASSIONATE ABOUT RUNNING

- 50 per cent agreed that it's part of who they are



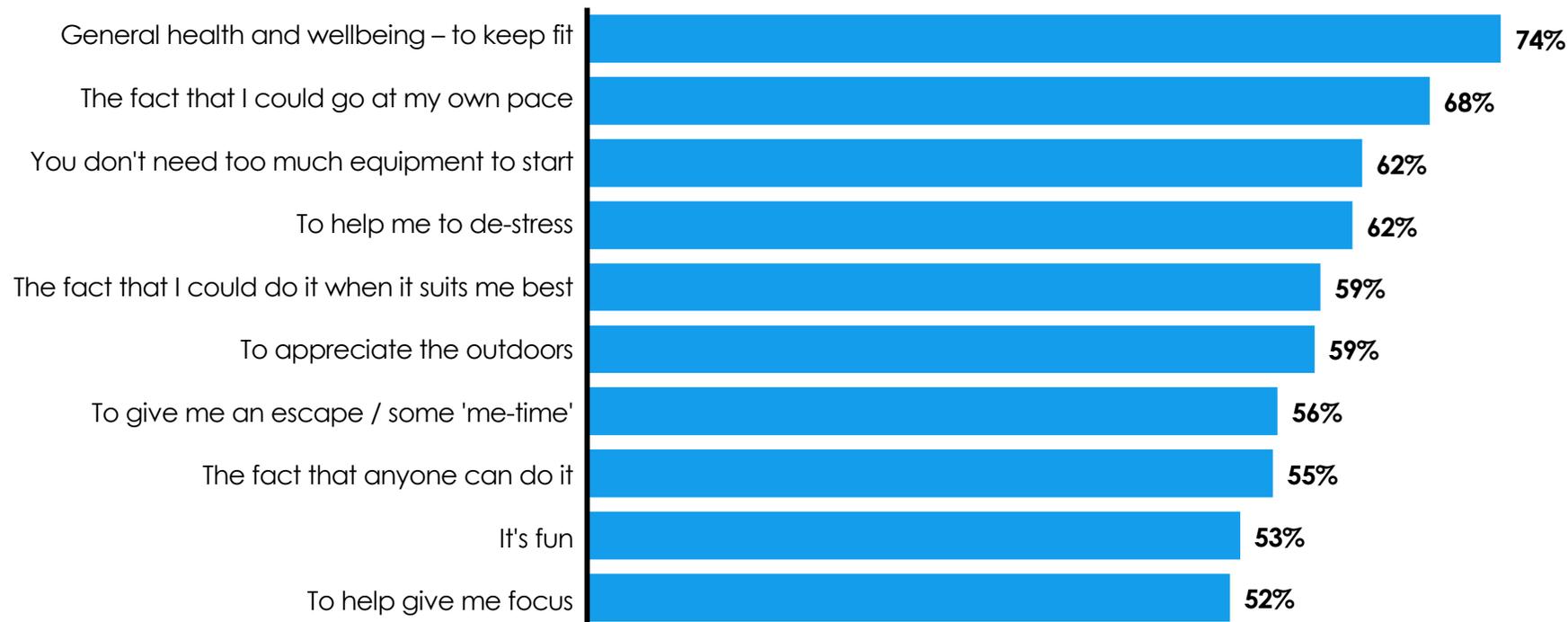
Q: How emotionally connected you feel to running?
Base size: Current Runners (5488) 16-19 (228) 20-24 (617) 25-34 (1386) 35-44 (1254) 45+ (2003)

↑ ↓ Represents a significant increase / decrease vs. total runners @ 95% confidence

INFLUENTIAL FACTORS ON DECISION TO RUN

- For current runners, the biggest factors in the decision to run are health reasons, the ability to go at your own pace and not needing much equipment

Thinking about the reasons why you run, how influential are the following factors on your decision to run?



RUNNING IS GOOD FOR MIND AS WELL AS BODY

- Three quarters (73%) of all runners agree that 'Running is good for my mind as well as my body'

Running is good for my mind as well as my body

