

GOOD FUTURES HORIZON SCAN

MASS PARTICIPATION

HORIZON

SCAN

JULY 2023



FOREWORD

For the past two decades, mass participation events have been one of the sector's biggest success stories. Starting out as an exciting and promising new category, the events sector quickly grew into reliable bankers that organisations could trust to rake in serious income year on year. From the success of sub-brands like Race for Life and Coffee Morning, these propositions and approaches were much copied across the sector and around the world.

Cut to the COVID pandemic, and everything suddenly got put on hold. And yes, income lagged during those years, but the sector made a Herculean effort to move events online and innovate in the virtual events space, building valuable digital skills and confidence along the way.

When restrictions finally lifted, hopes were high that the mass pax market could easily rebound back to its previous state. The expectation being that people would have a roaring appetite for in-person activities. One that could easily be sated by organised charity events. But this recovery is yet to materialise.

So why are events struggling? Well, to put it simply, as prices rise and consumers become more circumspect with their spending, they expect and demand value from their experiences. The baseline of frictionless engagement, serviced by technology, delivering connection, community and a little dash of magic, is now the norm, rather than the exception. New consumers have entered the market, whilst older audiences have retired from more demanding physical events. And then add in the challenge of sponsorship. Why sponsor someone else's cause when you could

give directly to a cause you personally believe in? Bluntly, the charity experience and portfolio hasn't been able to keep with consumer expectation and demand.

Let's dig into the numbers a bit more – Fundraising income from the biggest 25 events **fell by 4% in 2022**, despite it being the full year without restrictions. And it's not just that fewer people are participating in events, it's that **those who are participating are doing fewer events** in total and raising less for the sector. On top of that, the virtual events that charities had worked so hard to launch during the pandemic **have begun to lag** and look unlikely to rebound. And the cost of living crisis that continues to rage on isn't a promising outlook for the short-term future either.

But looking more closely at the narrative; numbers were slipping even before the pandemic hit. By 2019, **the top 25 events were making £143m**, where, a decade before, the **top 20 alone had raked in similar numbers** each year. Mass participation events were losing traction years prior to the crisis we're observing now. Events have been struggling to draw in new blood, and bankers have slowly become less reliable. There is of course the dream that events will rebound of their own accord, and that we'll see a future full of busy mass participation events backed by smiling major donors and partners flinging cash around en masse – but it feels unlikely.

Against this backdrop, mass participation teams will need to return to the innovation drawing board once again, to find the next injection of creativity and excitement that have historically made events so successful.

But it's not all bad news. As we return to normal post-pandemic, people are craving shared experiences and connections with others – the perfect opportunity for the sector to provide that. Accordingly, **81% of charities aim to be involved in UK mass pax events in 2023**, and **46% of previous participants** expect to increase the number of events they take part in this year. And despite the cost of living crisis potentially adding to slipping numbers, it's important to remember that even in difficult economic times, mass participation events are all about building sustained, authentic connections with supporters.

With all this in mind, we've split the report into two areas: threats and opportunities. The first section discusses the biggest threats to growth in the mass participation events sector, starting with the difference between incremental and radical innovation and how to innovate in the current environment; the sponsorship problem and building your supporters' confidence with asking for money; the future of virtual events and digital technology in in-person or hybrid events; and finally, acquisition and the issue of attracting new blood.

Section two looks at three key opportunity trends to consider as a starting-point for potential innovation. From the growing gaming and streaming market; building and communicating event sustainability; and delivering surprising and exciting moments of joy to audiences.

We hope that this Horizon Scan offers actionable inspiration now, rather than later.

Eef Leurs
Good Futures Trend Analyst



CHALLENGES



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INCREMENTAL VS RADICAL INNOVATION



The mass participation market has seen some great feats of incremental innovation over the past decades. But with events struggling to rebound to pre-pandemic levels (let alone to the levels of funding they were reaching a decade ago), how do we take this innovation one step further and rebuild the events market into something built specifically to cater for new audiences and new needs?

How are you investing in revitalising mass participation events? We need to be willing to experiment with new audiences, new events, marketing channels, delivery mechanisms, acquisition strategies, and sustainability practices.

INCREMENTAL VS RADICAL INNOVATION

Historically, the mass participation market has been great at incremental innovation in product. It's not for no reason that some products, like Cancer Research UK's Race for Life and Macmillan's World's Biggest Coffee Morning have been so successful for such a long time. And its achievements in pivoting towards hybrid and virtual events during the pandemic were impressive to say the least.

We need to see the importance of investing in mass pax properly.

But there are still some areas in which innovation in the market is struggling. We're seeing event participation and income drop, with competition for the audiences that are still willing to participate increasing. A quick trawl through this year's top 25 biggest events shows that fourteen of them are walk or trek based events, with other sporting events making up a further five and social events completing the list. Ultimately, this means we're operating in a market where a huge chunk of events, particularly sporting ones, are catering to the exact same audience: the relatively affluent 34-45+ demographic.

Lifting and shifting the same templates for a 10k run or coffee morning, or innovating incrementally on the basis



of events that were popularised a decade ago, no longer works to acquire or grow market share, and doesn't reflect the changing expectations and interests of audiences.

Younger audiences aren't signing up as much, primarily citing a lack of time to train or take part and fitness/health reasons; and older audiences, particularly the 65+ demographic, are unlikely to come back after COVID, largely citing health issues as their biggest barrier to entry.

And while some of these events used to be bankable year on year, we're quickly coming to realise that they have a shelf life. Events are tired and in need of future proofing and continuous innovation. To keep them going, we need to create cultures that innovate regularly, consistently, and freely.

So where do we go from here? We need mass participation events to reach and engage wider audiences; from

young people, to men, LGBTQIA+, BPOC, and more. And we don't just need them to fundraise, we need them to participate. People to engage, take part, raise awareness, and stand up for a cause. As we're seeing new needs and new audiences come up, we need to meet them with new products.

Essentially, we need to experiment. Mass participation is a challenging space to innovate in, and whilst consumer needs have moved on from where they were a decade ago, the charity market hasn't necessarily kept up. Combined with the challenges of lockdown, complicated governance, the cost of living crisis driving a focus on short-term ROI, and emerging technologies - these problems may feel insurmountable.

But to move forward, we need to see the importance of investing in mass pax properly, and to shift thinking beyond the traditional event template. We need to experiment based on current and future audience needs, focus on building a culture of innovation that's not afraid of failure, and create an inclusive market that appeals to a wider variety of audiences.

Whether it's innovating on event type, marketing channel, delivery mechanic, acquisition strategy, or even sustainability, how do we begin to cater to new audiences and expectations?

CASE STUDY



Disrupting a Market

Depop wasn't the first online marketplace for fashion resale (Ebay got there 18 years before them, and before most of Depop's customer base were even born). But, in the 12 years since Depop was founded in 2011, it has grown to a user base of over 30 million people, with a valuation of 1.6bn in 2021, when it was bought by Etsy.

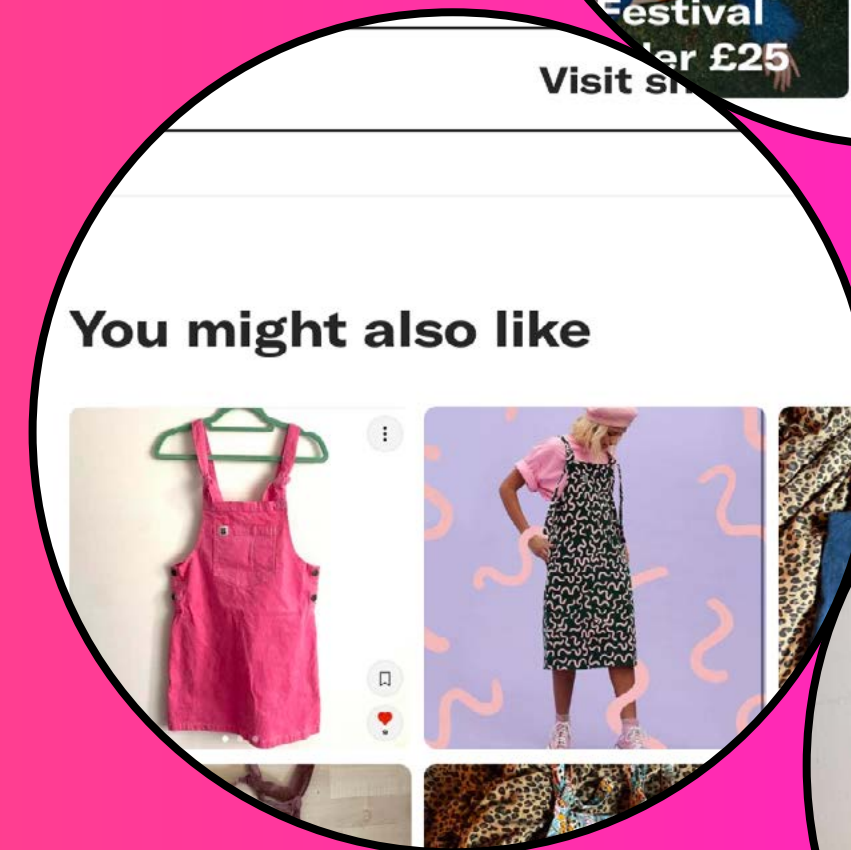
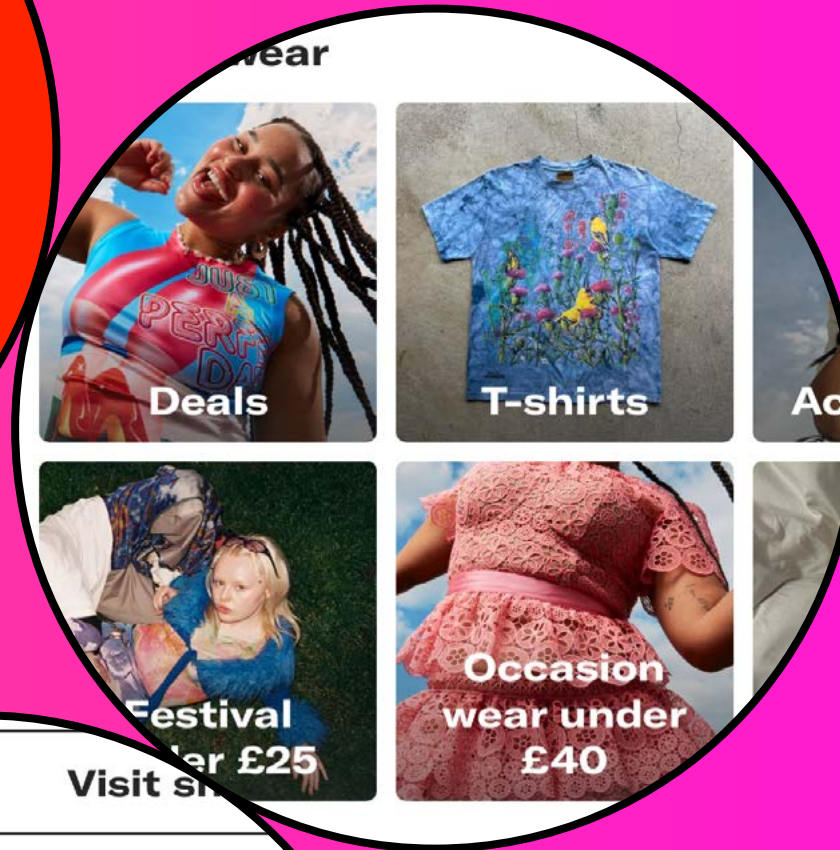
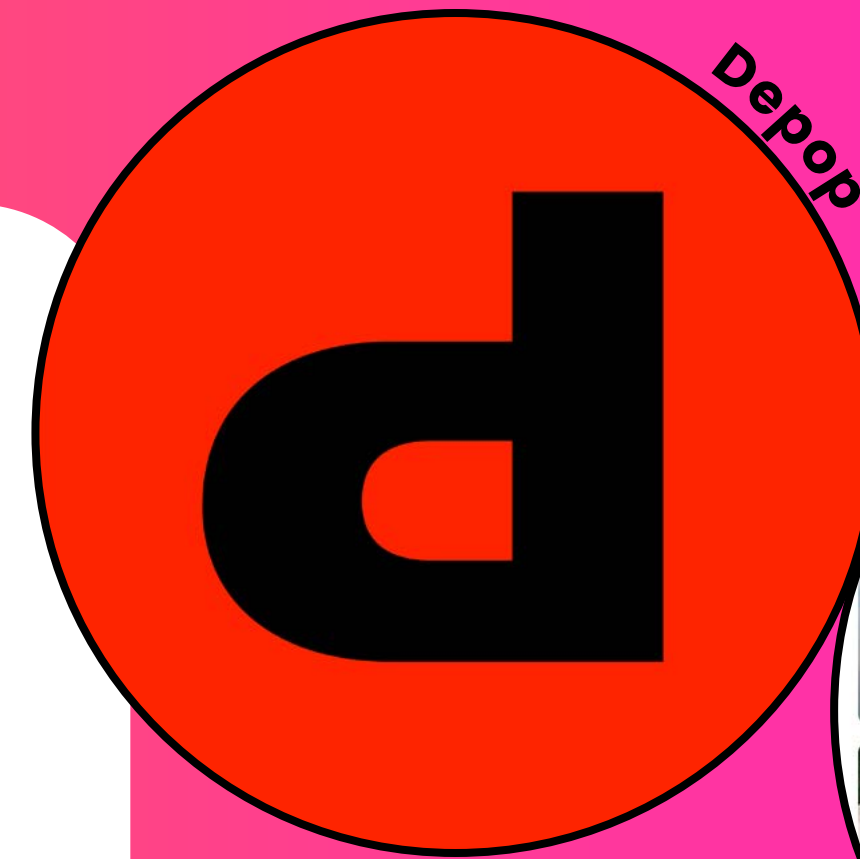
Whilst Ebay is still a tech business behemoth (having been involved in the creation, funding or growth of businesses like PayPal, Craigslist, Skype and Stubhub), its peer-to-peer offer declined in user numbers, revenue and (if you've been on it recently), UX.

Enter Depop. A social e-commerce platform that was designed, first, as a place to share and celebrate style between friends. Where Ebay gave you overwhelming choice, Depop gives you community, culture and curation.

So What: Depop's disruption wasn't about better tech or a radical offer, it was about audience. Rather than putting the user experience second, Depop have centred their audience and their values as foundational to their business model. Depop describes itself as the community-powered fashion ecosystem that's kinder on the planet and kinder to people.

Whilst Ebay gives users endless choice, Depop helps cater to personal taste, whilst enabling them to explore and expand their style and fashion. If Ebay was TK Maxx, with racks upon racks of endless choice, Depop stepped in as the personal stylist to help you find the gem you've been searching for.

Depop celebrated the lived experience of their users, empowering them to create with the Depop brand, making it very quickly the app of choice for younger audiences to discover new trends, upcycle their wardrobe and make a little extra cash.



SPONSORSHIP FATIGUE



Asking people for money is tough. Alongside the discomfort in making the ask, add into the mix the current cost of living crisis has tightened everyone's purse strings. Ultimately, this means that participants may decrease their targets and raise less overall; and non-participants' worries about sponsorship are a barrier to them getting involved in events at all.

Although there's some good news on the horizon, with almost **half of current fundraisers** set to increase their targets next time they decide to take part, sponsorship remains a huge barrier towards acquisition. Which is crucial in a sector struggling for new blood. Building your supporters' confidence and re-injecting fun into sponsorship will be key for maintaining donation levels.

SPONSORSHIP FATIGUE



We've probably all had the experience of that moment, when the sixth or seventh friend in as many weeks puts out the Facebook post saying they're doing The Great North Run/London Marathon/5k/10k/Fun Run/Swim/Tea Party/Fancy Dress Day for XXX amazing cause and asking their friends, family and acquaintances to sponsor them. And, as the potential donor, you feel that sense of exhaustion of 'not again.'

Getting people to ask for money is difficult. As much as they want to support your cause, they may feel uncomfortable, not have the time to commit to sponsorship, or feel that they don't have a sufficiently strong network to reach out to. And with the cost of living crisis pinching wallets across the country and showing limited signs of letting up, the pressure feels higher than ever.



There are two layers to the sponsorship problem: event participants decreasing their targets and raising less overall; and the people who feel so uncomfortable with sponsorship that they see it as a barrier to participating at all.

How are you giving your supporters the tools to continue to fundraise as they participate in events?

For the former group, there is some positive news on the horizon. **Nearly half of fundraisers** (45%) say they'll set a higher target the next time they decide to take part in an event. A further 39% are planning on raising the same amount next time, and only 6% say their target will be lower. Essentially, increasing targets are mostly down to experience and confidence with both fundraising and events (**34% of people** increasing their target state it's due to their building fundraising experience, and **30% cite** entering more challenging events). As people get past their initial worries about sponsorship, they become increasingly comfortable with the concept.

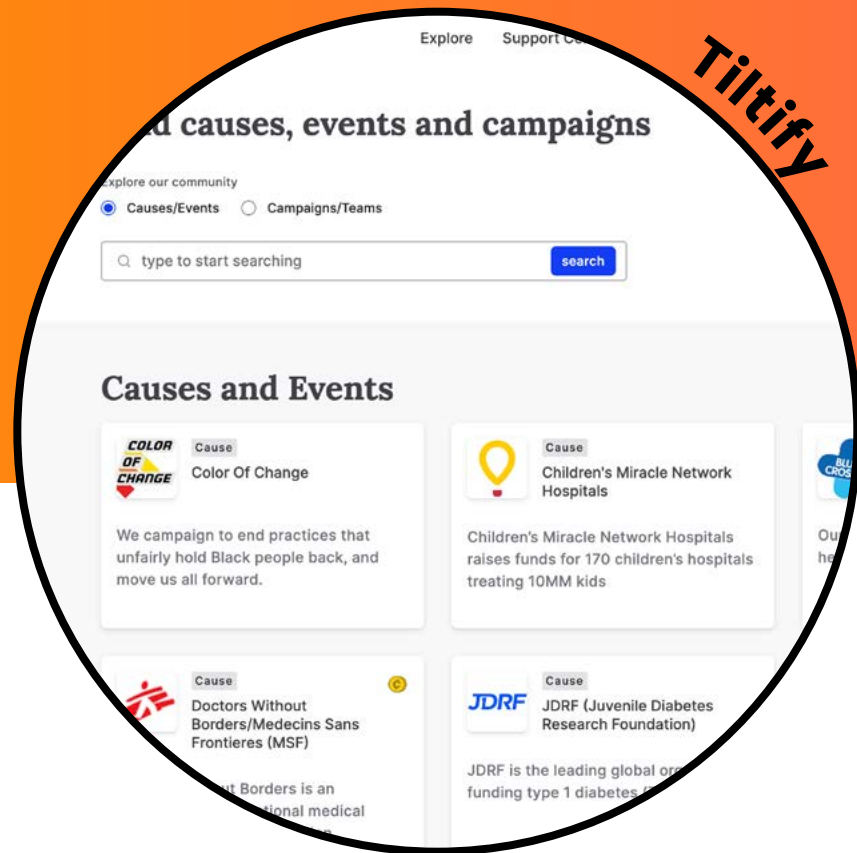
For those with decreasing targets, the top concern is (unsurprisingly) **the cost of living crisis**, followed closely by donor fatigue and the idea that it becomes harder to

ask someone a second time round. This latter issue is particularly interesting to focus on. Only **1% of people** who haven't taken part in an event before signed up for one in 2022, meaning that decreasing barriers around continued sponsorship will be increasingly important for keeping events afloat. How are you giving your supporters the tools to continue to fundraise as they participate in events, and how are you encouraging them to build confidence in doing so regularly (and maybe even increasing their targets)?

For non-eventers, sponsorship continues to be the second biggest barrier to taking part, just behind health or fitness reasons. **34% of people** state that they don't like asking people for money, which stacks onto the further 11% of people who feel that they're too busy to commit to fundraising. Interestingly, the 18-24 year old age group have the least concerns asking for donations. Only **19% of them** feel that this is a barrier, compared to about a third of every other age group. Instead, they're mostly concerned about finding the time to train or take part. Overcoming that challenge could potentially unlock a new audience with an open attitude towards sponsorship, and build their confidence in fundraising early-on to ensure continued engagement.

So let's dive into some ways other organisations and companies have overcome similar challenges.

CASE STUDIES



Making Sponsorship Fun

Tiltify is a community-based fundraising platform, with a focus on engagement and real time interaction. The platform recognises that most sponsorship that people engage with is essentially community fundraising and has brought these into the online space, where people are able to gamify the process as well. Instead of a Facebook post saying 'please sponsor me,' think of a poll asking how you should dress up for the London Marathon, with people donating towards the option they want to see.

So What: Tiltify's success comes from offering genuine, authentic interaction in a digital space. With live streaming and online communities thriving off the back of them (think of Twitch and Discord), how can you incorporate those principles into making sponsorship fun?

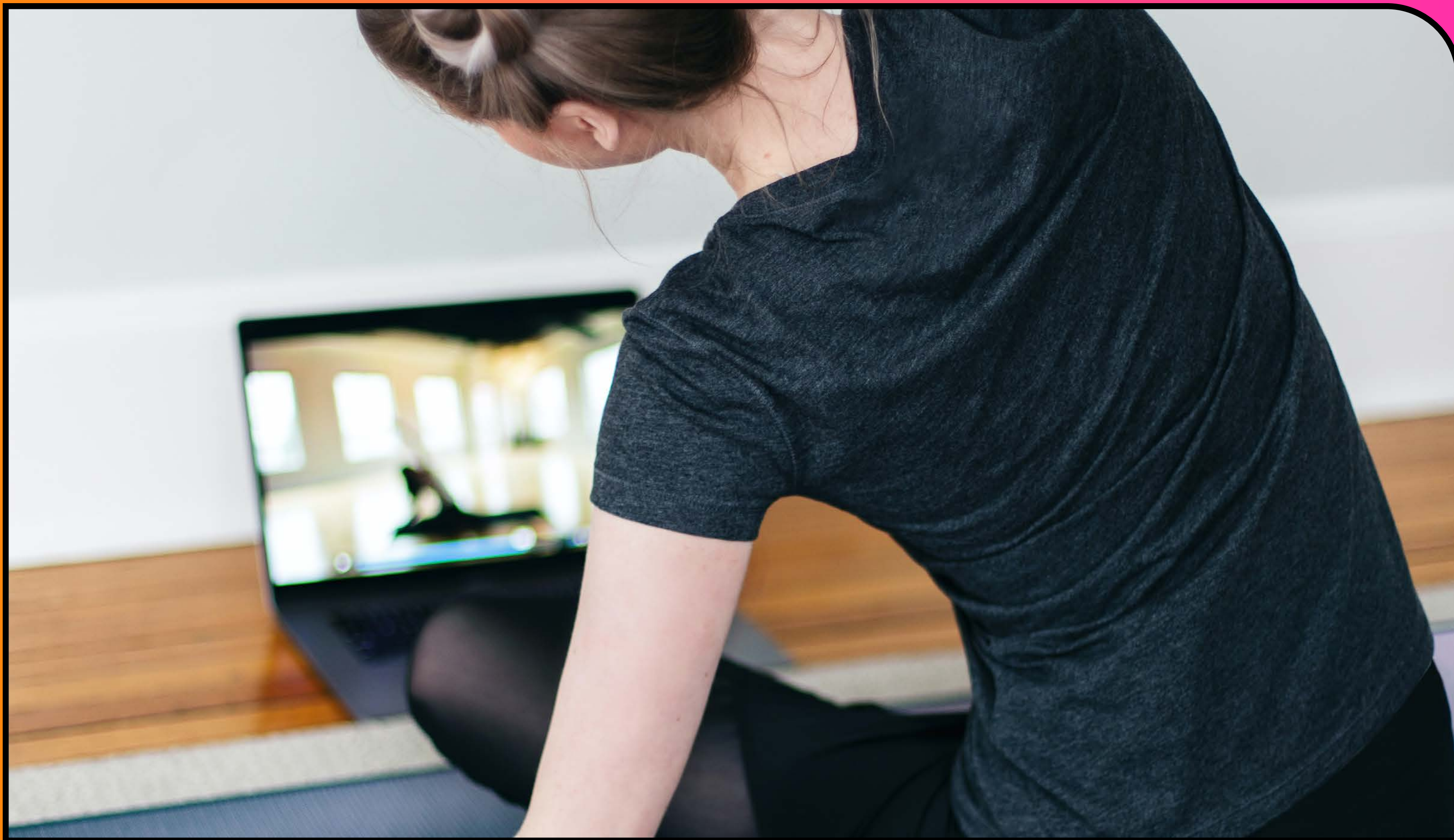


Creating With Your Brand

Recently, a **Wes Anderson inspired trend** swept TikTok. People were creating highly stylised video montages of their everyday lives, in the iconic (and immediately recognisable) style of the director. Picture whimsical music, symmetrical shots, pastel colour palettes and blank facial expressions.

So What: You might be thinking what this has to do with your organisation and sponsorship specifically. But the trend embodies the idea of giving someone the visual tools to tell a powerful story, in their own unique way. How are you giving people the opportunity to tell their own story with your branding? What resources are you providing them with throughout their sponsorship journey, that allow for them to colour in-between the lines of your brand imagery, supporting them through the donation ask whilst amplifying your brand image and subsequent awareness? And how are you making it fun and creative for them?

VIRTUAL VS IRL



In the wake of pandemic restrictions being lifted, virtual events are struggling. With audiences increasingly craving real-life experiences and connections, the value of virtual events is being challenged.

Yet, although virtual is unlikely to continue to be a major growth area, there is still an opportunity for innovation. Expect to see more hybrid events to create more accessible experiences for all audiences, with a focus on finding ways to deliver quality experiences that connect virtual participants to the event and the cause just as much as in-person audiences.

VIRTUAL VS IRL



As lockdowns closed public spaces, venues and in-person activities, charity teams rapidly pivoted in-person events, online. Yet now that restrictions have been lifted, virtual events **are stumbling** and many organisations are left unsure of what to do with them now.

This year, the first post-pandemic where events were able to operate entirely without restrictions, saw virtual event income drop by more than **50% on average**, with Facebook events in particular **taking a tumble**. When surveyed, **almost half of regular mass-pax participants** said they're unlikely to return to virtual events, with only 12% saying they'd continue to participate in virtual events. On top of that, virtual events saw the **average amount raised per participant** fall, while in-person events saw an increase.

In contrast, in-person events saw an income boom, as people increasingly crave the opportunity to get out and live their lives again. With audiences embracing activities that help make memories and real-life connections, we're expecting them to continue to choose in-person experiences, especially as the cost of living crisis continues to force prioritisation of spending.

So, although virtual is unlikely to be a big growth area over the coming years, could it still be an opportunity to innovate? How do we make sure we're continually

engaging the 12% of people who'd prefer to keep doing virtual events, because they feel more comfortable or out of convenience?

In future, applying these options will allow audiences to live and breathe events without even being there.

We'll likely see successful events evolve to accommodate hybrid models of participation, capitalising on the benefits of virtual and in-person events in equal measure. The key to creating a strong hybrid event? Creating a quality experience that allows the person participating on the other side of a screen to feel like they're a genuine part of the event, and feel connected to both the other participants and the cause they're supporting all at once.

One of the strategies to do so that we're expecting to see more of is the application of new technologies. Augmented reality (AR) and virtual reality (VR) hold huge potential to redefine hybrid events, as well as storytelling and engagement for in-person events. In future, applying these options will allow audiences to live and breathe events without even being there, as tapping into the

virtual experience economy will drive the creation of memorable experiences that are both purpose-focused and accessible.

The difficulty for organisations will be access to these technologies. New audiences are increasingly expecting seamless online experiences, complete with shiny tech tools and sleek interfaces. For organisations for whom the digital pivot is relatively recent, the tools, skills, and confidence to attract these audiences may simply not be an option. Despite the pandemic taking the pressure off of virtual events, it'll be important to keep investing in the digital aspect of events to engage new audiences with higher expectations. How are you overcoming the technological barriers of your organisation, and working to build the confidence and skill within your team to do so?



CASE STUDIES



New Technologies

Technology company District is hoping to drive a paradigm shift in the mass participation industry by driving the creation of **innovative, customer-centric technology platforms** to act as force multipliers.

The idea is that by having the right technological tools (anything from a good centralised platform to integrated AR), virtual events can become audience experiences that enrich people's lives and are worth paying for.

So What: In order to build fully engaging virtual or hybrid events, the creative and immersive application of technology will become a crucial part of delivering audience experiences. Particularly as virtual now once again faces competition from in-person events, how are you ensuring that your virtual offering not only runs smoothly, but offers an equally exciting and meaningful experience as your in-person events?



Hybrid Integration

As with many events, the London Marathon was forced to go virtual throughout the pandemic. In 2021, **they relaunched with a hybrid offer**, allowing runners to run both in person or virtually, by completing the distance at a time and place of their choosing while logging progress on the app. In comparison to 2019, the most recent in-person only event, participation doubled, with 80k runners taking part.

So What: Although in-person events are back to being the preferred mode of engagement, there is still a notable segment of supporters that intend to continue participating in events virtually; whether it's due to the accessibility or convenience of the location or residual fears about being in large crowds, can you employ hybrid events to ensure accessibility for all and decreased barriers to entry?



Keeping Audiences Engaged

During COVID, Airbnb faced an existential crisis. With travel largely banned across the world, bookings on the platform had plunged **by 72% by April 2020**. Yet the business saw a remarkable comeback. Essentially, they decided to focus on their core principle of hosting, and began investing solely into supporting their hosts throughout the pandemic, regardless of whether they were able to actively accommodate bookings at that point. Experiences moved online, but for the most part, the company pivoted their business towards simply valuing their community.

So What: Airbnb is an example of keeping your audience warm and nurturing your relationship with them, even through times where you may not be able to directly engage them anymore. Maybe hybrid or virtual events can no longer be part of your strategy moving forward, at least for the time being. How do you continue to invest in your relationship with your virtual-only participants?

ACQUIRING NEW SUPPORTERS



Mass participation events are struggling to attract new blood. And although the cost of living crisis is certainly exacerbating the problem in the short-term, the lack of innovation in events is simply failing to excite new audiences.

In the short-term, investing in existing relationships will be crucial for maintaining mass participation income. But how are we preparing for the future? From marketing in new ways and on different platforms, to new events and challenges, exciting partnerships with relevant brands or corporates – drawing in new audiences will mean getting creative.

ACQUIRING NEW SUPPORTERS



Mass participation events are struggling to get new people in. Whilst the gap in sign ups from regular participants is an issue right now, it's wildly exacerbated by the fact that there's so little new blood coming into the market each year. As mentioned in the previous chapter, only **1% of people** who haven't taken part in an event before have signed up for one in 2022, and only a further 8% had given it consideration. That's not a positive outlook for the future. Why aren't we seeing more people get involved?

In large part, it comes back to the innovation and sponsorship problem. The events that were drawing in audiences five or ten years ago just aren't cutting it anymore, and the cost of living is making the idea of sponsorship even more of a barrier to entry than it was previously.

How are you reaching these new audiences?

In the short-term, that makes it crucial to work harder on maintaining existing relationships and maximise the opportunities within those, but that won't save mass pax in the long-run. How do you nurture and encourage the next generation of participants?

Let's talk marketing. How are you reaching these new audiences? Are you acquiring through big marketing pushes, communities, word of mouth, digital? Whilst we're seeing charities become more active on platforms like Facebook and Twitter, there's still plenty of untapped potential in platforms like Instagram, LinkedIn, and TikTok (and maybe even the **new Threads app**). It's crucial to note that each of these platforms has its own, unique style of communication, and different niches and audiences live across each. At times, with thriving communities that are ripe for charities to tap into. Where does your potential new audience live? And how are you engaging them in authentic, meaningful ways?

In terms of existing event types, we know that the biggest preference for non-eventers is to engage with walking challenges (according to a **whopping 85% of them**), which indicates the importance of low entry barriers for new acquisitions. Looking beyond the existing offer, we're expecting **broader partnerships** with sticky brands to thrive over the coming years, to draw more eyeballs towards events-based fundraising.

In the next section of the report, we'll be diving into societal trends that could offer inspiration for innovating on entirely new event types, that capitalise on the needs, wants, and expectations of new audiences, and help with acquisition in the process.



CASE STUDY

Liquid Death

Historically speaking, the bottled water industry hasn't seen a lot of innovation. With most water sold being repurposed tap water, there's not much opportunity for differentiation. And yet, Liquid Death, a heavy metal-inspired canned water brand, has turned the market on its head. Most recently valued at **\$700 million**, it's become the fastest growing non-alcoholic beverage brand in history.

So What: Liquid Death is a great example of a company innovating in a seemingly static market. But how have they done this, and what lessons can we learn from them?

It comes down to a few key ways of differentiating themselves. Crucially, they've created a niche. They're targeting people who don't drink alcohol but still want a fun drink. And more specifically, the skateboarding, rock-listening, environmentally conscious amongst them. While going that niche may sound scary, their success shows that authenticity and commitment to branding attracts people beyond its core market.

Secondly, they're innovating in the sustainability space - something most bottled water companies (and many mass participation events) are still relatively early on their journey towards doing. In a world where climate anxiety is on the rise, audiences have a preference for sustainable products and events.

On top of that, they're experimenting with **creative communication**, outlandish **merchandise** and marketing, creative niche partnerships, and an exclusive tiered membership programme. Of course, Liquid Death has more licence to be as disruptive as it is than some organisations do. But they're showing the power of creating an authentic, niche community around a meaningful product.



TRENDS



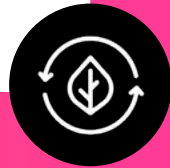
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Gaming



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Event
Sustainability

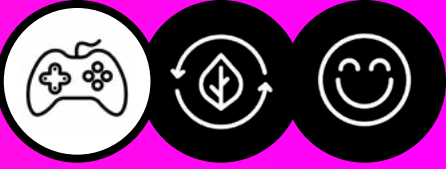


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Moments
of Joy



GAMING



With the global games industry booming, gaming has become the hot topic for charities. But beyond engaging potential supporters with streaming fundraising, how do you successfully build engagement with this new audience

People are turning to gaming for connection, social interaction, and belonging – they’re looking for community. And this should be the focus for charity entry into the space; the opportunity to tap into a community with pre-existing sponsorship models and philanthropic appetite. It’s a chance to leverage gaming to raise awareness, diversify income, attract new audiences, and foster support and community-led initiatives.

At \$200b a year, the global gaming industry is bigger than film and music put together. Within the UK alone, an estimated 44m people regularly play video games, and 45% of people are spending more time gaming than they did a year ago. It's not for no reason then, that gaming is a hot topic for a lot of charities. Increasing amounts of organisations have streaming fundraising opportunities, but there's serious untapped potential for broader ways of engaging the gaming community.

And the community aspect of gaming is what should be most appealing to charities. People are drawn into gaming because they're seeking connection, positive social interaction and a sense of belonging – which they find through multiplayer games and gaming-focussed streaming. In fact, almost half of young gamers engage with games in other ways, through gaming channels, podcasts, online gaming communities or gaming conventions. Tapping into gaming as a fundraising opportunity will be most effective when building a community around shared, inclusive values. It also means being active in spaces where gaming communities already thrive, such as Discord, Reddit and Twitch. Whether you're tapping into an existing community, or creating your own, how do you do so authentically, in order to build long-lasting engagement?



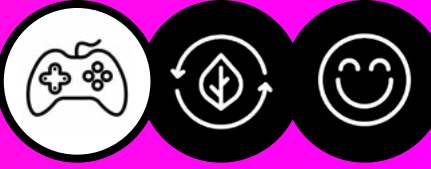
Yet some organisations make the mistake of thinking that gaming isn't their current or future audience. When thinking of a stereotypical gamer, you might have an image of a square-eyed teenager sat behind multiple monitors in their parents' basement – but that's not representative of the actual market. The average gamer in Europe is 31 years old, and Millennials are gaming more than any other age group. And while you might be picturing shooting games or zombie apocalypses as the typical game they're playing, there's strategy games, worldbuilding games, puzzle games, or even Candy Crush (famously played by audiences of all ages).

So what about streaming specifically? Consider Twitch, a platform built to host live video streams. Famous for streaming video gameplay, it's also home to livestreams of any other activity that the millions of people who use it are interested in. Streamers have the opportunity to interact with their audience, and the audience has a chat function to enable them to communicate with each other.

And, luckily for the charity sector, tons of creators in this space have a strong focus on philanthropy. Typically, streamers are used to asking for money (it's how they make streaming profitable in the first place), meaning sponsorship is less of an issue. From emergency appeals by streamers that raise over a million within days, to pre-existing mass participation events led by streamers, the top influencers are driving the community towards prioritising charitable giving.

Ultimately, the gaming space should be perceived as an opportunity to not only build mass participation events, but about raising awareness, or grow and build corporate partnerships for your events. It's a new way of diversifying income, bringing in new audiences, focussing on digital, and being more supporter- and community-led.

CASE STUDIES



ICRC x Fortnite

The International Committee of the Red Cross (ICRC) recently launched its **“Play by the Rules”** event, in partnership with a number of big Twitch streamers. The goal of the event is to challenge its participants to avoid committing war crimes in popular shooting games, particularly as they stream their gameplay. They’ve even created their own Fortnite mode to help teach players the rules of actual war.

So What: With more and more organisations tapping into the gaming space, how do you connect your events in this space to your organisation and cause? The ICRC has done a great job of embedding their mission into the nature of the event – which for many organisations is easier to do virtually than in real life. And though the event wasn’t monetised, it’s easy to see the potential of similar challenges in the mass participation space.



War Child

For their latest gaming collaboration, **War Child has teamed up with World War I game 11-11: Memories Retold**, to create themed downloadable content to raise awareness for their organisation. The charity has a history of tapping into the gaming community in a number of ways, from themed content, to mass streaming events, and even concerts of pieces from famous game soundtracks.

So What: The organisation has invested in a huge number of creative partnerships to build awareness of the charity within the gaming community. As a result, they have the ability to tap into these relationships to drive participation for their challenge events. How are you building your credibility with this audience, and driving genuine engagement before you even start the conversation about mass participation events?



St Jude’s Hospital

St Jude’s yearly **charity gaming livestream event** is a great example of mass participation in the gaming space done right. Typically, the event features interactive competitions, performances, video game face-off, key streaming influencers, as well as impact stories told by beneficiaries. The event is part of a larger, year-long fundraising campaign, which has raised more than **\$50m cumulatively** for the charity.

So What: The reason St Jude’s campaign works so well is down to a couple of things. From expanding their presence on relevant platforms over time to picking the right niche partnerships (both brand and creator) for their audience, as well as playing into the traditional gaming tournament style, and wrapping it all up by authentically embedding their impact story throughout all their events. Ultimately, it comes down to their investment in understanding the space they’re operating in.

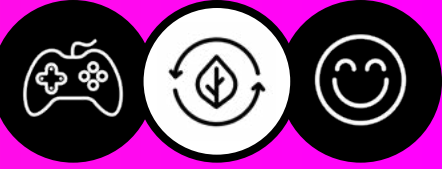
EVENT SUSTAINABILITY



Appetite for sustainability initiatives in everything from retail to investing to, you guessed it, events is on the up. Growing climate anxiety is driving demand for impactful sustainability practices across the board, and clear articulation of these initiatives.

Organisations will need to prioritise sustainability, going deeper into the social, economic, and governance aspects of the concept, whilst still maintaining the overall quality of the event. So, how are you integrating sustainability? And how are you effectively communicating these improvements to your participants?

EVENT SUSTAINABILITY



When asked what would improve mass participation events better, survey respondents went with **affordability as the top answer** – unsurprising during a cost of living crisis. Perhaps more surprisingly, when looking slightly beyond this, we find that **almost equal priority** is given to improving sustainability (in third place, with 35%) as it is to improving facilities (second place with 36%).

With climate change becoming increasingly visible, and **climate anxiety on the rise**, demands for clear, practical, and impactful sustainability initiatives are on the rise, regardless of the initial mission of the organisation participants are supporting. And we're only expecting this phenomenon to continue.

Value-alignment across industries is becoming a top concern for audience loyalty across the board. For instance, **93% of global retail consumers** now expect the brands they use to align with their views on environmental issues and they'll put their money where their mouth is. About **72% of people** consider sustainability in their purchasing decisions, and it's likely that these sentiments extend to the charitable events they're willing to take part in as well. Sustainable approaches are no longer nice to have, they're becoming fundamental.

Until now, sustainability hasn't always been a top priority for the mass participation space, with most of the focus

going **exclusively towards environmental outcomes**. Yet as emphasis on this issue begins to rise, organisations should focus on data gathering about sustainable impacts of their events, and **understanding broader sustainability concepts** surrounding social, economic, and governance issues.

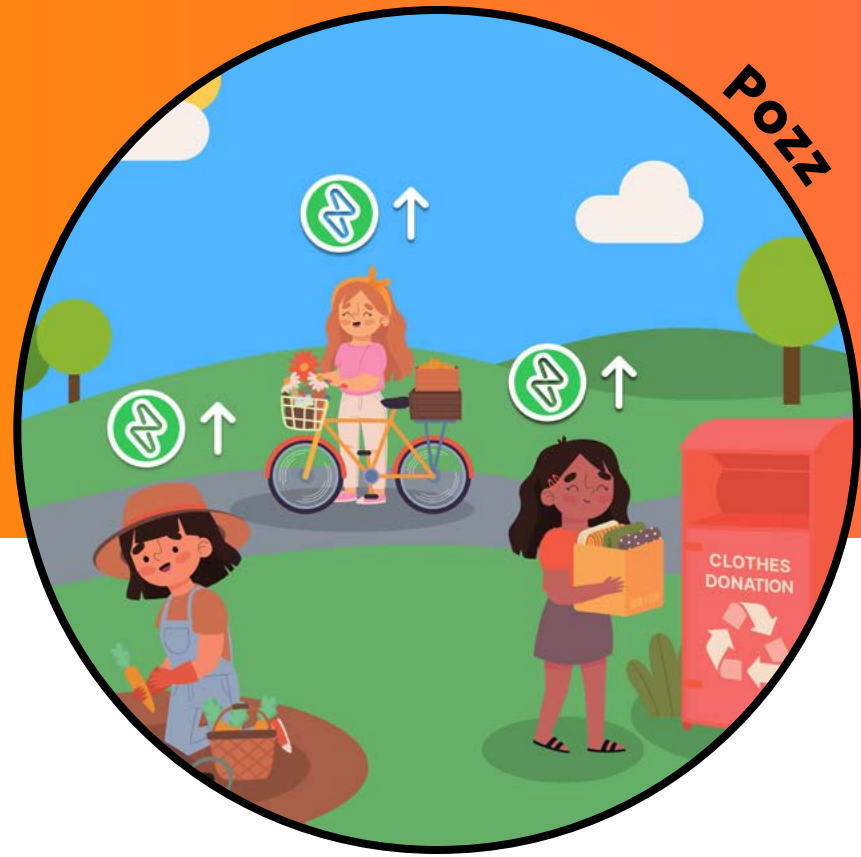
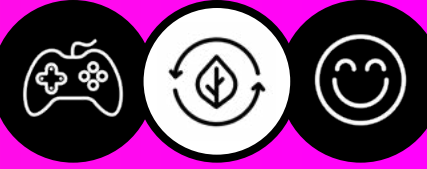
**Sustainable approaches
are no longer nice to
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fundamental.**

And beyond simply having these initiatives and improvements, communicating them in clear, transparent and convincing ways to your audience will be essential towards building loyalty and trust in the future. With the **backlash against greenwashing** heating up, the standards for total transparency about impact are rapidly increasing. Shout about your green credentials, but don't shy away from owning your failures either.

How are you integrating sustainability into your innovation approach? How do you balance improving sustainability with maintaining the overall quality of the event experience? And how do you communicate that you've made these improvements?



CASE STUDIES



Pozz

New platform Pozz is essentially a social media network aimed at children with the intention of fostering sustainability from a young age. At its core version, it aims to encourage small actions with big impacts through gamified challenges – think of challenges for taking short showers, or for composting.

So What: One way of incorporating sustainability into your event is to dedicate a specific aspect of your challenge or core premise to it – are you encouraging people to be particularly mindful of sustainability in the way you’ve set up the event?



Glastonbury

The iconic festival Glastonbury has long run a number of sustainability initiatives as part of its philosophy. This year, the festival was run entirely on renewable energy made from waste cooking oil, as well as a wholesale ban on **single-use plastic drink bottles** and disposable vapes. On top of that, tent retailers have launched initiatives to **refund any tents returned to them** under the campaign aiming to have ‘No Tent Left Behind’ at the campsite.

So What: Glastonbury is a good example of an event that has integrated sustainability throughout their event. Their green initiative is a comprehensive review of their total environmental impact. How thoroughly are you embedding climate-friendly initiatives into every single aspect of your event, and how are you leveraging your event partners to do the same?



Heineken

In summer 2022, Heineken began bringing pieces of Atlantic Forest with them to festivals, to create mini installations of urban forest inside biodomes, so that the public could have a moment of reconnection with nature between one show and another. The initiative was a part of the ‘Green Your City’ platform, which hopes to bring the sustainability lens to life, nightlife, and culture.

So What: By bringing these spaces of greenery and quiet to large cultural events, Heineken was hoping to show the importance of contact with nature, to stimulate more conscious and sustainable attitudes among festival goers. How are you integrating climate-friendly green spaces into the physical (or virtual) environment that you’re hosting your event in?

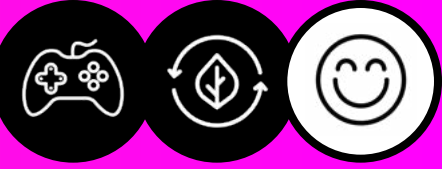
MOMENTS OF JOY



Nowadays, it seems as if every month throws a new crisis our way, from the cost of living crisis, to political upheaval, to environmental concerns. In turn, finding small moments of joy in the day to day has become a priority this year, to off-set everyday anxieties that accompany unrelenting polycrisis.

Brands are embracing the moments economy, with people chasing whimsy, playfulness, and opportunities to live life to its fullest extent. Yet brands are failing to live up to the excitement that audiences are craving. Within this context, mass participation events have a unique opportunity to help deliver this joy, create connections, and help people rediscover their lust for life.

MOMENTS OF JOY



Ever since the pandemic, it feels like we've lurched from one crisis to another. We sailed straight from COVID into a cost of living crisis, have had three Prime Ministers in that time, countless political reshuffles, war in Ukraine, and just logged the **hottest week on Earth** on record. On top of that, we're seeing a **mental health crisis** – probably not unrelated.

With all of these events coming at us seemingly faster and faster, the future seems more uncertain than ever. And so, more and more people are adopting a 'live in the now, worry about the future later' mindset. People have always enjoyed playful and surprising experiences, but they've taken on new meaning and urgency in times of polycrisis.

With so much going on, most of it out of our hands, day to day life can begin to feel overwhelming. So what do we do about it? For the average person, the answer is simple: enjoy yourself as much as you can. Maximum indulgence and excess are the name of the game.

"The purpose of existence is joy. If there is no joy, then what is the point?"

Deepak Chopra, SXSW 2023



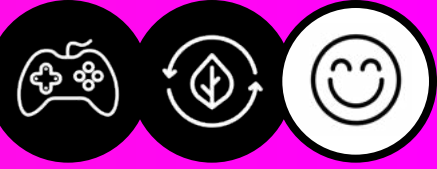
In response, we're seeing brands lean into the **moments economy**, with **83% of people** actively seeking out experiences that bring them joy and happiness. In fact, **61% of adults across the UK, US and China** crave brands that help them feel intense emotions. And nearly half of people explicitly say they want to avoid things that are predictable and formulaic. Most damningly, 70% of the same respondents say that they can't remember the last time a brand did anything that genuinely excited them. So how do you integrate this need for excitement into your mass participation offer? How are you delivering joy to your audiences, and facilitating moments that can help people rediscover their lust for life, or even just forget their day-to-day anxieties for a moment or two? Can we make engaging with big issues safe, light, and fun?

And mass participation events are uniquely positioned to be able to help tackle these issues. Another side effect of polycrisis means that audiences are reimagining what's important in their lives and are making conscious decisions to dedicate their time towards celebrating what really matters. For many of them, that includes fostering connection: the **majority of people** say events drive feelings of connection and make them feel part of a community.

Ultimately, regardless of the delivery mechanic used, fun, surprise, and excitement are becoming increasingly important tools for organisations that want to cut through the noise and deliver meaningful experiences to their audiences. Consider how you could go about delighting your supporters.



CASE STUDIES



Rembrandt House Museum

June 2023 saw Amsterdam's Rembrandt House Museum, showcasing the artists' classic Golden Age work, launch a pop-up tattoo studio. Surprising? Yes. Popular? Extremely. Dubbed the '**Poor man's Rembrandt Project**,' the sold out pop-up was intended to draw in younger audiences to the newly renovated museum, with famous tattoo artists offering tattoos inspired by Rembrandt's paintings and signature styles.

So What: Partnering with a series of tattoo artists is not the museum's usual fare, nor does it necessarily cater to its typical audience. It's a great example of a brand taking a risk with its event offering in order to attract new audiences, as well as tapping into the moments economy to genuinely surprise and delight its visitors.



IKEA

Ikea's taken a somewhat unconventional approach to draw consumers back to its store. During **Milan Design Week 2023**, the retailer organised raves at its exhibition space, in collaboration with a local vinyl shop. The idea was to create more memorable impressions on its audience and maximise potential of its retail spaces.

So What: When it comes to surprising your audiences, throwing a rave in your warehouse exhibition space goes a long way. With rave culture making a comeback in post-pandemic times, the brand was able to tap into the societal need for surprise, and some good old-fashioned hedonism. How are you creating these surprising and joyful experiences for your audience? How are you consciously building events around leaving a lasting impression?



Choose Love Garden

The Choose Love garden, an installation at the Chelsea Flower show in May 2023, was both stunning garden and political centrepiece at the same time. Created by asylum seekers and volunteers, the garden was built from sustainable materials from refugee camps with the "superadobe" building technique often found in refugee camps. After the show, the garden was moved to Good Food Matters in Croydon, working with those who have been displaced.

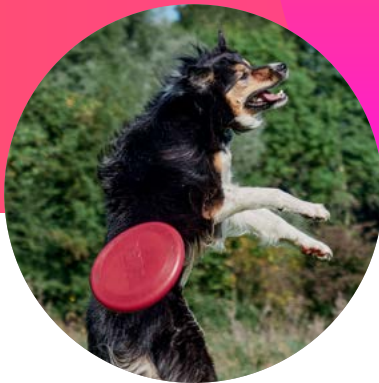
So What: The garden returns to the idea that we can make engaging with serious issues safe and light, and potentially even embed the learnings into small moments of joy for supporters. How are you tapping into restorative experiences to raise awareness for your mission?

SO WHAT?



1// Culture of Innovation

How are you fostering a culture of innovation? Recognise that innovation has to be a continuous process, and 'bankable products' will need to evolve year on year.



2// Be Willing To Fail

A large part of an innovative culture is being willing to fail, and fail fast. How are you accepting and encouraging failure within your organisation?



3// Attract New Audiences

How are you innovating with the audience of the future in mind? Consider new needs and wants as demographics evolve and new audiences come into the space, especially as old audiences may not come back.



4// Build Sponsorship Confidence

Sponsorship is a confidence game. What resources are you providing your existing and potential participants with in order to build experience and comfort in this area?



5// Co-Creating With Your Brand

What resources are you giving your supporters to communicate their own story with your branding? How do you let them co-create their sponsorship journey?



6// Considering Hybrid

With demand for in-person events soaring, yet some audiences still preferring virtual, how do you accommodate for both? How do you create accessible and inclusive events for all of your audiences?



7// Keeping Virtual Warm

If you can't continue to accommodate your virtual-first audience, how are you continuing to keep those relationships warm? What other ways can you continue to engage these supporters?

SO WHAT?

8//

Integrating New Tech (AR/VR)

Augmented and Virtual Reality technology will ultimately change the way we tell stories, towards a more immersive and creative experience. How can you begin to incorporate these into your events?



9//

Gaming Community

Gaming is built around a strong, collaborative community with a culture open to sponsorship. How do you authentically tap into and engage this community – or even build your own?



10//

Streaming Collaborations

Streaming collaborations seem to be everywhere right now. With huge potential for fundraising and mass participation, consider your event offering in this space. How can you stand out from the crowd?



11//

Ground-Up Sustainability

Superficial sustainability for the sake of sustainability is no longer enough. Audiences expect climate-friendly initiatives built in from the ground-up, embedded across all layers of an event.



12//

Transparency

Crucially, audiences expect transparency about the sustainability initiatives (and to be honest, everything else) in place. How do you communicate your climate impact to showcase the changes you've made, as well as own up to your mistakes?



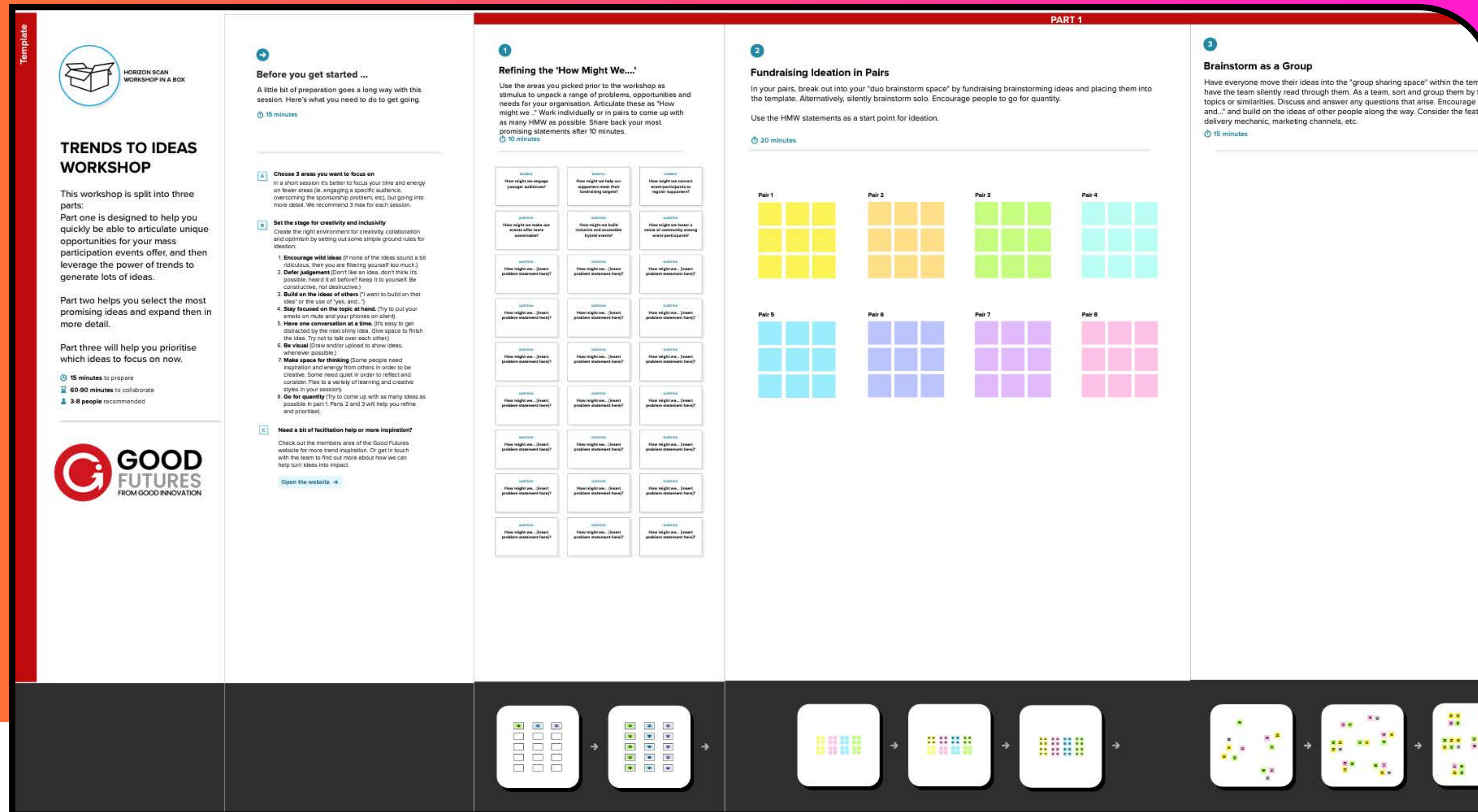
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Be Surprising

Your supporters want to be surprised. Audiences across the world are craving new, fun, light experiences. How are you providing joyful and exciting events in order to create lasting impressions?



WORKSHOP IN A BOX



To help you go from inspiration to action,
we've created a handy 'Workshop in a box'.

This toolkit will guide you through a 90 minute creative session, designed for 3–8 people.

This workshop is split into three parts:

1. Designed to help you quickly be able to articulate unique opportunities to expand your mass participation events offer.

2. Helps you select the most promising ideas and expand then in more detail.

3. Will help you prioritise which ideas to focus on, which ones might need a bit more thought, and which ones are (quite frankly) a bit crap.

Download the kit [here](#) or [visit the Mural](#).

CONTACT US

Want to discuss how you can use the horizon scan as an opportunity to innovate?

We're here to help.

Get in touch.

GoodFutures@goodinnovation.co.uk

Click **[here](#)** to find out more about Good Futures.