Global Running Culture 2025

Redtorch × RUNNING INDUSTRY ALLIANCE

SPORT ON SOCIAL

Jonny Murch
CEO, Co-Founder

Dear Friends and Colleagues,

Running is more than a sport. It’s a culture – rich, diverse and constantly evolving. Understanding that culture is key to building meaningful connections between brands and the millions of people who lace up their shoes every day for reasons as varied as self-expression, social belonging, health and high performance.

At Redtorch, we believe in the power of data-led insight to decode what drives consumers and unlock growth for brands. As an independent Research and Creative Agency dedicated to making sport more relevant, we created SportOnSocial Global Running Culture to help brands see the running world through the eyes of the runner – not the marketer.

This report tracks digital signals from search and social across 10 key markets and combines them with audience data to reveal how running culture differs globally – and what’s driving interest in each market. From Brazil’s tech-savvy runners who treat street races and social apps like Strava as part of the experience to community-driven crews blending competition with connection, the data shows the nuance behind the global running boom.

We’re proud to partner with Running Industry Alliance, who have shared their perspective on the development of the running industry and to welcome the global viewpoint of World Athletics. Whether you're a brand, retailer, federation or event, we hope it helps you better understand – and better serve – today’s runners.

Let’s grow together, by connecting into global running culture.

Methodology

Search trends and cultural signals

Google holds over 90% of the global search engine market share and serves nearly 4 billion users worldwide.

Redtorch used web and YouTube searches on Google Trends and Baidu Index data to track running-related search terms, topics and queries across platforms and cultures.

The search terms were grouped into keyword clusters – from training and performance to lifestyle, wellness, events and gear – to reflect the full spectrum of running interest. These clusters not only capture functional behaviours but surface cultural signals through the language people use around motivation, identity and community.

Real Voices from the Ground
To bring cultural insights to life, the report features short video vox pops from runners around the world. These clips share firsthand perspectives from everyday runners, capturing local behaviours and cultural trends that add depth and human context to the report's insights.

How does it work?

To identify trends from the past 12 months, we analysed global search behaviour for 'running' between June 2024 and May 2025 and compared it with the same period over the previous five years.

Audience & Market Lens
The analysis focuses on anyone searching for "**running**" – from avid runners to the running-curious – across 10 key markets identified through Global Web Index as having the highest interest in running globally: Brazil, China, France, Germany, India, Japan, Mexico, Spain, United Kingdom and United States.

Top and 'rising' searches
The analysis uses both top and rising searches to explore global interest in running. Top searches show consistently high-volume terms, while rising searches reveal fast-growing queries that signal emerging behaviours and shifts in attention.

Cultural Lens
Cultural signals provide an understanding of how running is more than a physical activity – shaped by motivation, barriers and context. By connecting search behaviour with cultural context, this research identifies what drives interest in running and distinguishes between passive content consumers and active participants.

Measuring brand visibility in search

The proportion of searches that included brand or product mentions within our running keyword clusters were analysed to understand which brands crop up most frequently in searches around running.

We identified running-related searches that referenced brands (e.g. Nike running shoes, adidas Duramo Speed) and calculated each brand's share of visibility – the percentage of total brand-related search volume they occupied within each market.

We also assessed the nature of branded searches in each market, distinguishing between brand-led queries (e.g. "**Nike running shoes**") and product-led queries (e.g. "**adidas Duramo Speed**") to reveal whether audiences are driven by overall brand affinity or specific product interest.

The number of brands shown per market reflects local search dynamics. Brand inclusion was based on visibility within each market's top searches and searches with the most YoY growth ('rising' searches) so the mix and volume of brands naturally varies – only those meeting the visibility threshold in each market were featured.

This method provides a directional measure of top-of-mind awareness and search-driven relevance. It helps identify which brands dominate the conversation, and how they're being discovered and recalled by running audiences.

Worldwide

Product/Brand-led Markets

Redtorch

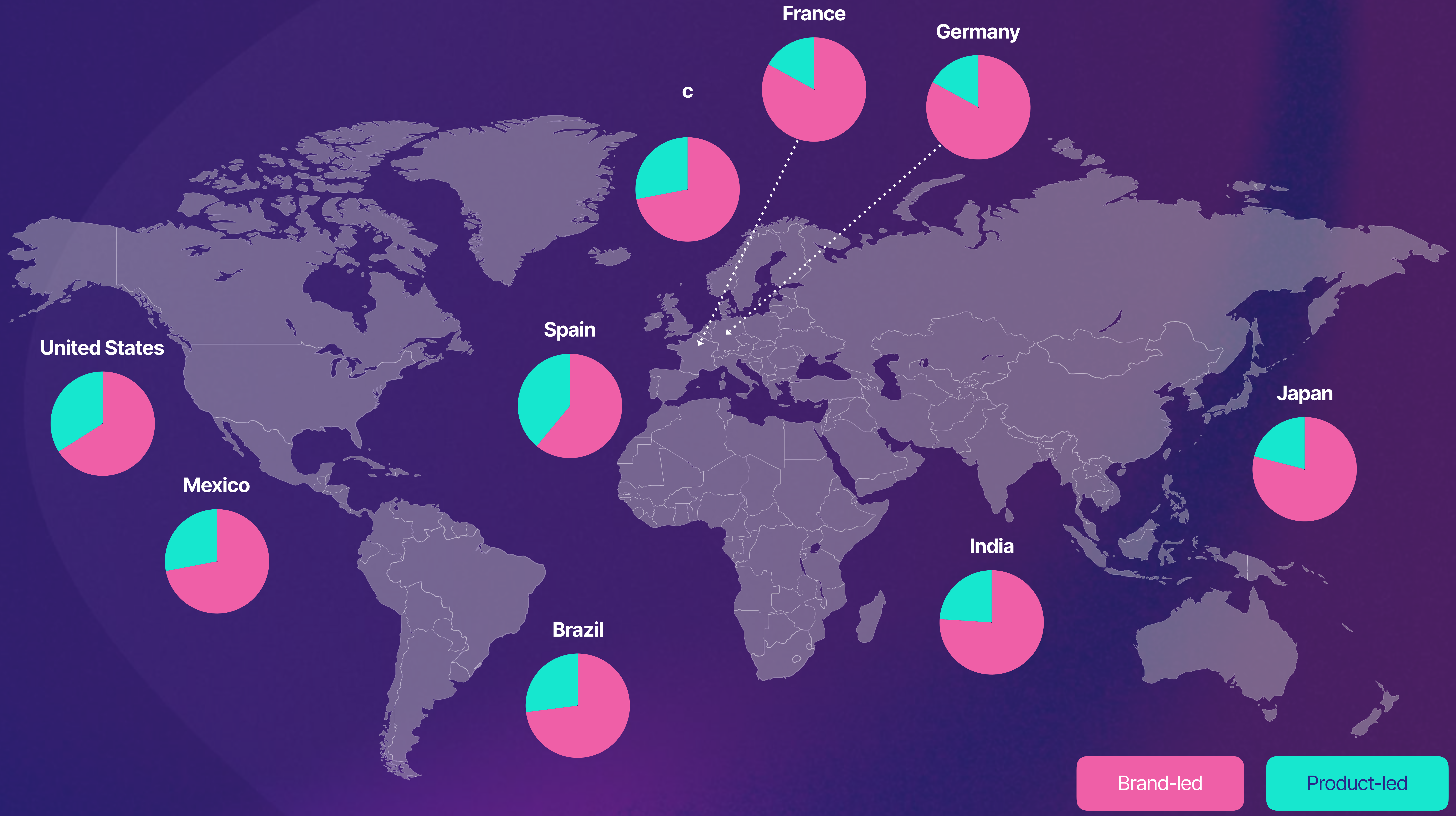
Globally, brand visibility is 73% brand-led and 27% product-led. All markets gain most of their visibility through brand names, with a smaller proportion driven by flagship products.

Brand-led = searches for generic brand names, e.g. Nike, Nike Store etc
Product-led = searches for specific products, e.g. Nike Pegasus 41

Brand-led Markets
Germany and France are the most brand-focused markets – 83% of visibility comes from generic brand searches. Nike leads in both, especially in France where it accounts for half of all visibility, driven by searches for Nike, Nike Running and Nike Store.

There is still some product-driven searches, namely for ASICS Novablast 4 (France) and Nike Pegasus 41 (Germany).

Product-led Markets
Spain leads the way in product-led discovery – with 31% of all visibility driven by flagship products. Brand still leads overall, but a wide range of Nike, ASICS, adidas and New Balance running shoes play a significant role in search interest and overall visibility.



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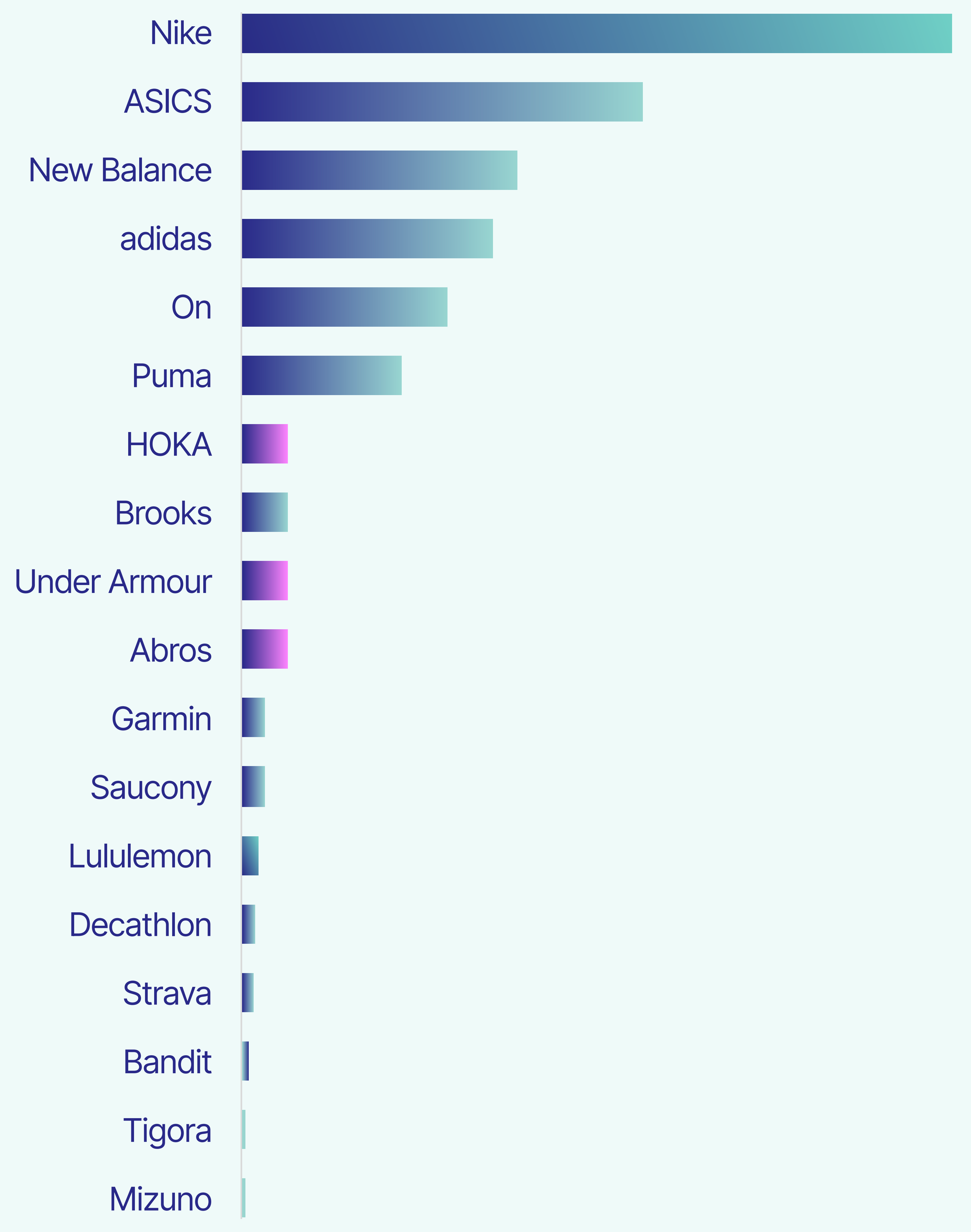
Global Share of Visibility



Global running visibility is 73% brand-led, yet a solid 27% of attention is now in model-specific searches. As high-quality products become talking points among runners, brand loyalty is giving way to product-led discovery. For example, conversations around standout shoes (not just the brands behind them) are taking centre stage.

Top performers

Nike tops global visibility, fuelled largely by master-brand searches, despite a healthy 32% of its current share coming from specific products – namely the Pegasus and Alphafly ranges. ASICS is the most product-oriented among the top performers, whereas New Balance sits at #3 almost entirely on brand strength.

Overperforming brands

Swiss brand On climbs into the global top five despite its relatively new appearance on the scene (2010). The brand's path varies by market: pure brand discovery in countries such as the UK and Brazil; Cloud-family model searches in Mexico, demonstrating how consistent product naming resonates with audiences and can shift awareness to high-quality products rather than big name brands.

Search terms

Searches conducted in local languages were translated into English to ensure all relevant brand queries were captured and compared consistently across markets.


Associação
Associação

Worldwide: Running Culture

Families turn runs into weekend bonding.

Searches for "**parent-child run registration**" (+100 % increase in China) and "**running shoes for kids**" (+70 % increase in India) – particularly across Asian markets – suggest parents are actively planning fun runs and buying child-specific gear. Running is evolving from a solo fitness activity to a shared family ritual.

Relevance

As running evolves into a shared family activity, brands have an opportunity to shape this behaviour – by creating products, experiences and stories that support intergenerational participation. This opens the door to family-first ecosystems: junior sizing that mirrors adult styles, parent-child content challenges and event partnerships that reward running together.

Slow and social miles gain status.

Rising interest in "**Zone 2 training**", "**what is pace when running**", "**Sunday Running Club**" - all of which increased by 250% on average in Germany – and "**run clubs near me**" (+200% increase in USA) point to a growing shift toward conversation-paced runs and community-led experiences, rather than chasing PBs.

Brands should consider shifting from the "performance-only" mindset that has long shaped running culture. There's growing value in supporting the social side of the sport – through inclusive pacing tools, promoting social run groups and showcasing ambassadors of all body types on social media to help running feel welcoming to everyone.

Digital challenge platforms set next-year goals now.

Searches for "**London Marathon 2025**" "**European Running Championships**" alongside "**Garmin run 2025**" have increased 250% in the past year. The search data identifies how runners plan well in advance by joining app-based challenges, mapping out races and starting training early. Preparing together has become part of the experience.

Brands can support runners throughout the journey, offering training content, timely product drops and partnerships with race apps.

Engaging consistently pre, during and post key events helps build community and keep the brand top of mind.

Female-specific running kit has moved from "nice-to-have" to non-negotiable.

Over the past 12 months, searches for "**women's running shoes**" have risen 200% in the US, "**women's running glasses**" are up 100% in Brazil and "**running shorts for women**" have climbed 80% in the UK. Interest in female-only events like Spain's "**Carrera de la Mujer**" has also grown (+130%). Over the last five years, searches for "**HOKA running shoes women**" have surged 600% – signalling a sustained and accelerating shift toward women-specific running gear and experiences.

Women are raising the bar on what they expect from running gear: fit-first, performance-tested and style-conscious.

Brands that deliver inclusive sizing, collaborate with credible female voices and spotlight everyday runners can build deeper, lasting loyalty.

Running, Redefined

By Alessio Punzi, Head of Running at World Athletics

Not the Third Running Boom – a Paradigm Shift
This isn't a simple bounce-back or a rehash of previous booms. What defines the current moment isn't just that more people run – it's the wider range of reasons they do it and the far broader map on which it's happening.

It's a shift in how running functions – for individuals, brands and culture.

What sets this moment apart is reach. The trend is truly global. Participation in mature markets has soared past pre-pandemic levels. China is limiting marathon permits to manage quality of delivery. Gulf races draw expats and locals alike. African races have regional and global pull. Southeast Asia is a hotspot. Brazil's industry is world-class. Where operators struggle, outdated business models – not demand – are usually to blame.

From Utility to Identity
Running has gone from being globalised to truly global – practiced everywhere, shaped locally. And it's not just about racing. Many who never pin on a bib still drive the industry: they buy shoes, use apps, engage with content.

That cultural elasticity has driven growth but also fragmented the space. For organisers, brands, and federations, the question isn't just "how do we attract runners?" it's "which version of running are we even talking about?"

No single playbook fits all. It's no longer just "how do we get people to show up?" It's "who are we designing for – and why are they here?" And also: "how do we impact the broader community – including those who don't run yet?" If the focus stays only on the already-converted, the wider potential is lost.

A Younger, More Committed Base
Young adults are entering the sport in large numbers. The 20–29 age group is now the fastest-growing in many city marathons – and often the second-largest overall. At the TCS New York City Marathon, under-30 finishers rose from 15% to 19% between 2019 and 2024. In Los Angeles, from 21% to 28%.

For many, running adds structure in a stage of life often defined by uncertainty. It's a proxy milestone – a way to reclaim agency and measure progress. Also, Gen Z spend differently, prioritising long-term health earlier than previous generations. Running isn't just a hobby – it's an investment.

Tech at the Centre
Elite innovation now shapes the recreational experience. Carbon-plated shoes, wearables, AI coaching – they're not niche. These tools help runners stay injury-free, motivated and engaged.

This matters. By 2030, one in six people will be over 60. For running to remain sustainable, it must remain accessible. Tech is making that possible.

New Terrain, New Intentions
Trail running is growing fast. It appeals to those seeking a less structured, more immersive experience. For many, success now includes solitude, landscape, effort, and self-reliance – not just time and rank.

Cultural Signals, Not Just Stats
Platforms like Strava, TikTok and YouTube (not to mention the Chinese-language social media) have become central to how runners express and share their journeys. The digital layer is no longer a side effect. It's where running culture takes shape.

That's why this report matters. By tracking search and media signals, it helps decode how running lives and evolves beyond race day.

Elite Inspiration
Elite athletes still anchor the sport. But their value isn't only in performance – it's in what they represent. Marathoners like Sifan Hassan and Eliud Kipchoge have a recognisable online voice and use it meaningfully. In today's culture, that matters.

The World Athletics Road Running Championships – next in Copenhagen in 2026 – reflect the evolution of event formats. These races combine elite and mass participation, built to meet broader expectations.

Collaboration remains key. At World Athletics, we see event organisers as the sport's central enablers. They turn interest into action. We're committed to helping them stay relevant – through advocacy, data, innovation and convening. A report like this is great in that it helps them decode cultural signals and better target their offering.

Running now stretches across motivations, ages, and contexts. That's what makes it durable. Not a trend – but a reflection of how millions choose to live.

It's no longer just "how do we get people to show up?" It's "who are we designing for – and why are they here?"

Vox Pops

Featuring runners from Germany, Brazil and France

Running Isn't Just Booming - It's Evolving with Pace and Purpose

By Rebecca (Becs) Richardson, CEO & Co-Founder, Running Industry Alliance (RIA)

The global running industry is thriving but it is the way the UK and Ireland are showing up in this moment that is setting them apart. Across retail, events, brands, services and communities, we are seeing a distinct energy: bold, values-driven, collaborative and fast-evolving.

At Running Industry Alliance (RIA), we work across the full ecosystem – brands, retailers, events, charities, services, media, communities, buying groups, distributors and NGBs. And from every sector, one thing is clear: we are in a boom moment but one that requires intention, not assumption.

A Culture-Driven Boom

The pandemic changed our relationship with movement. What began as survival and self-care has evolved into ritual, identity, and belonging – more than ever before. Today's runners span generations, genders, ethnicities, backgrounds and ability levels and they bring new expectations to the table.

We are seeing powerful growth in hybrid identities: the casual runner who races ultras, the weekend club member who leads a local community run, or the new runner entering through charity-led, tech-led or event-based programmes. This cultural expansion brings opportunity but also responsibility.

Retail That Builds Relationships

In a financially stretched landscape, consumers are still investing but with greater scrutiny. Retailers in the UK and Ireland are stepping up as trusted guides, not just gear providers. Whether online or in-store, the expectation is clear: educate me, connect with me, know me.

We are seeing real innovation in service, tech, and product curation especially from running specialists who are combining personalisation with purpose. And across the board, transparency, sustainability and local relevance are becoming make-or-break factors.

Events as Meaningful Meeting Points

Events are more than races, they are anchors of connection. They offer a vital space where community becomes experience. Whether it's a grassroots trail run, a city centre 10k or a multi-day ultra, these gatherings are where identity, story and shared purpose meet the elements.

Runners increasingly seek more than medals: they want belonging, values, safety and inclusion. Events across the UK and Ireland are answering that call with boutique formats, family-friendly options, inclusive race policies and integrated sustainability measures – and most importantly they are fostering community. Events are a place where the ecosystem lives and breathes in real time.

Brands: Listening, Leading and Co-Creating

Consumers today want brands that stand for something and the UK and Ireland are proving to be tough but loyal markets. Runners here ask smart questions, expect authenticity and respond to brands that listen before they lead.
From local startups to global giants, successful brands are engaging in real conversations supporting community crews, forming meaningful charity partnerships, launching inclusive campaigns and innovating in response to real needs. It's no longer about just creating product. It's about creating value, relevance and resonance.

Media, Services, and Sector Unity

The power of media, platforms and service providers has never been more influential. Runners consume through stories and community, not just specs and features. Trusted sources, local insight and purpose-led storytelling matter deeply.

Services and suppliers are also evolving to meet this moment from sustainable packaging to inclusive tech. Sector-wide, there's a rising recognition that shared knowledge, not silos, will power the next wave of growth.

Collaboration Is the Competitive Edge

If there is one thing that defines our market right now, it is this: collaboration is our superpower.

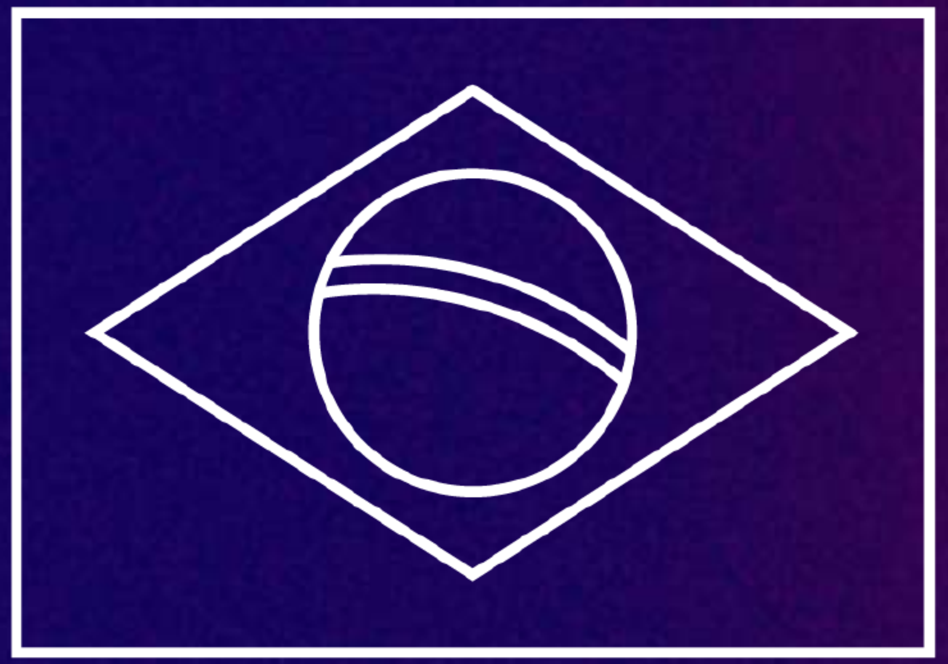
We may currently lack real-time market data compared to some other regions, but we make up for it with proximity, openness, and willingness to work together. That is where RIA plays its part – creating the space and structure to connect, align and move the industry forward – together.

The global running boom is real however cultural relevance, connection and shared purpose are what will define who leads it.

Let's keep moving forward together with pace and purpose.

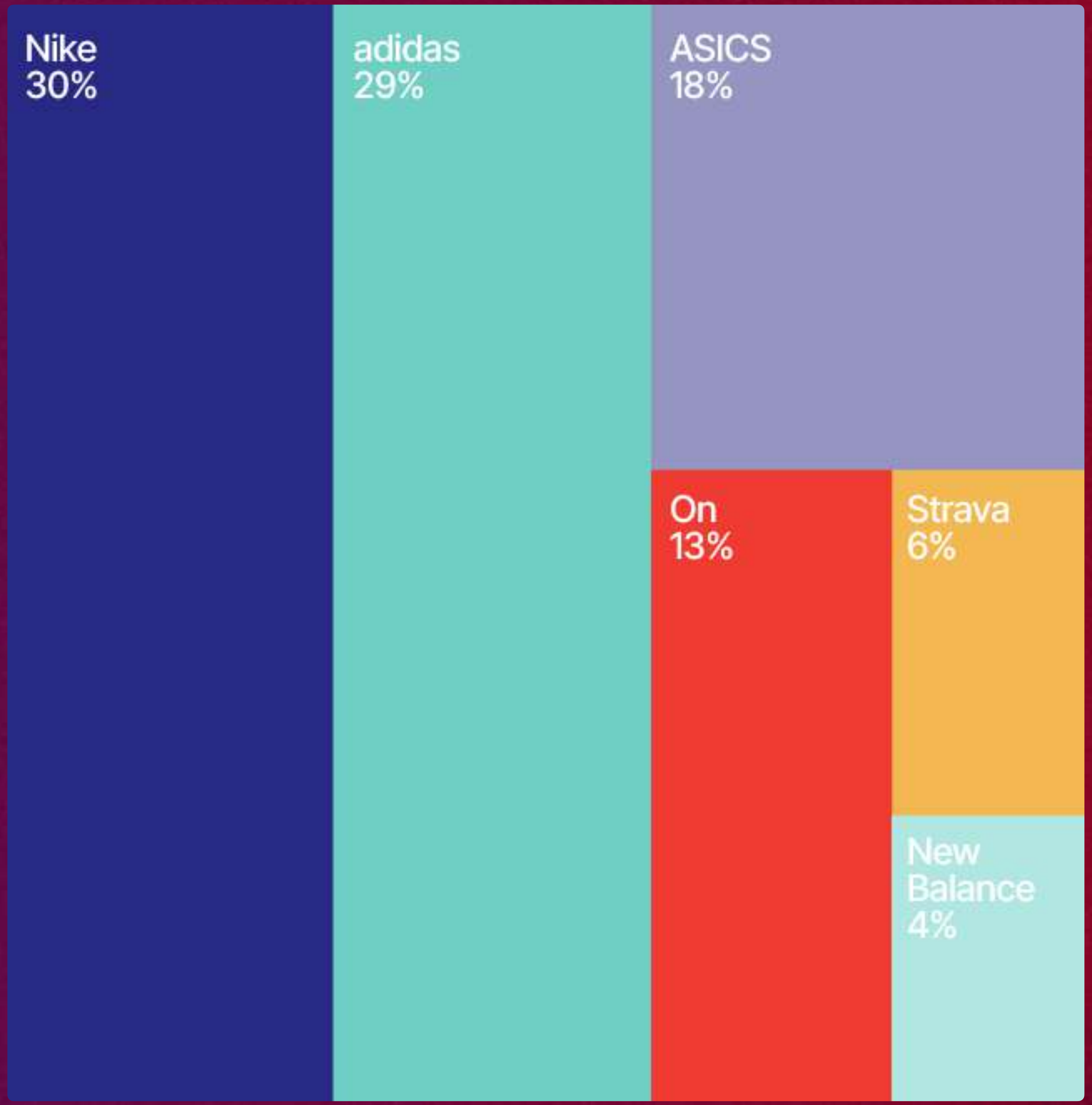
"The power of media, platforms and service providers has never been more influential. Runners consume through stories and community, not just specs and features."

Key markets



Brand Visibility

Nike and adidas compete for top spot in a market that is still largely brand-led. adidas now leans slightly product-first, whereas Nike remains mostly brand-driven.



Top Performers

Nike's visibility is almost entirely brand-led (76%) and fuelled by brand-name searches, e.g. Nike, Nike Store, Nike Corrida. In contrast, adidas benefits from 55% product-led visibility thanks to a rise in searches for the Duramo line. ASICS' split mirrors that of Nike, with the Novablast 4 shoe driving the 23% share of product-led interest.

Overperforming Brands

On secures 13% of Brazilian visibility, 45% higher than its global share. Generic queries for On give the Swiss company a brand-led resonance only beaten in visibility share in the Mexican market.

Search terms

Searches conducted in local languages were translated into English to ensure all relevant brand queries were captured and compared consistently across markets.

Brazil: Running Culture

Everyday Elite

Everyday runners are embracing high-tech shoes, making performance features the new standard.

Searches for "**Fila Racer Speedzone**" (3,600% increase), "**Nike Pegasus 41**" (1,950% increase) and "**adidas Duramo Speed**" (+140% increase) have all risen sharply over the past year. The spike highlights growing demand for advanced, tech-driven footwear – with features like carbon plates, high-stack foam and strong energy return now expected by everyday runners. Everyday runners now treat speed, bounce and style as the norm.

Relevance

This surge reflects a mindset change: advanced features like carbon plates and energy return are no longer reserved for elite athletes. Everyday runners want the feeling of speed, power and progression – even on a casual 5km. There's growing space for brands to connect emotionally by celebrating this pursuit of performance at every level.

From Just Running to Running Right

Women are moving from basic searches to performance-focused gear tailored to their needs.

Over the past five years, Brazilian women have consistently searched for gender-specific running content – but in the last 12 months, their behaviour has become more focused and confident. Searches for "**women's running shoes 2025**", "**high support running sports bra**" (up +680%) and "**workout sheet for beginner women**" (up +540%) show a move away from general discovery toward more technical, personalised needs.

It's a shift from simply starting to run, to running well, running strong and running in a way that fits their goals and their bodies.

The rise in technical, female-focused searches reflects a more confident and informed running audience in Brazil. There's space for brands to show up early with performance-led products designed for women – not just through empowerment messaging, but by backing her goals with gear that meets her standards.

Review-First Runners

Runners are turning to YouTube reviews first when choosing running gear.

In Brazil, searches for "**best running shoes 2024**" (+550%), "**men's On Running sneakers**" (+70%) and "**unboxing Pegasus 41**" (+210%) have all climbed sharply in the past 12 months. The trend shows runners are turning to YouTube to research gear before stepping into a store. Creator-led reviews and unboxings are now a trusted part of the decision-making journey – with audiences valuing honest opinions from real runners over polished retail messaging.

YouTube creators are becoming a key part of how runners discover and evaluate new gear – often before visiting a brand's own channels. Real voices, like runners and coaches, carry more weight than polished campaigns. As unboxing content becomes part of the decision-making journey, brands have an opportunity to elevate the packaging experience – turning the first impression into a shareable, trust-building moment.

Street-Race Socialisers

Running together is the new night out.

Over the past 12 months, searches for "**corridas de rua SP 2025**" (+3550%) and "**Strava**" (+60%) have surged while "**corridas de rua 2024**" has emerged as a trending term. Runners are embracing street races and social apps as central to the running experience.

Planning routes, tracking progress and sharing achievements are now part of the culture – blending competition with community.

As Strava feeds and local race calendars shape how new runners engage with the sport, especially younger audiences, brands have a clear role to play. Spotlighting street-ready kits, curated playlists and Strava club activations can help runners capture, share and celebrate the moment. Social-first race-day drops and creative content formats can turn everyday runs into a sense of shared belonging.

Vox Pops

Featuring a runner from Brazil

China: Running Culture

Parent–Kid Pace

Parent-child runs grow in popularity as weekends are turned into active family time.

There is a rising interest in family-friendly fitness, as proven in searches for "**parent–child run registration**" (+100%) and "**kids' running shoes**" (+45%). Parent–child fun runs are growing across China, often organised by schools and/or WeChat parent groups.

These short, low-pressure runs offer families a way to spend time together outdoors while building healthy habits in a relaxed setting.

Relevance

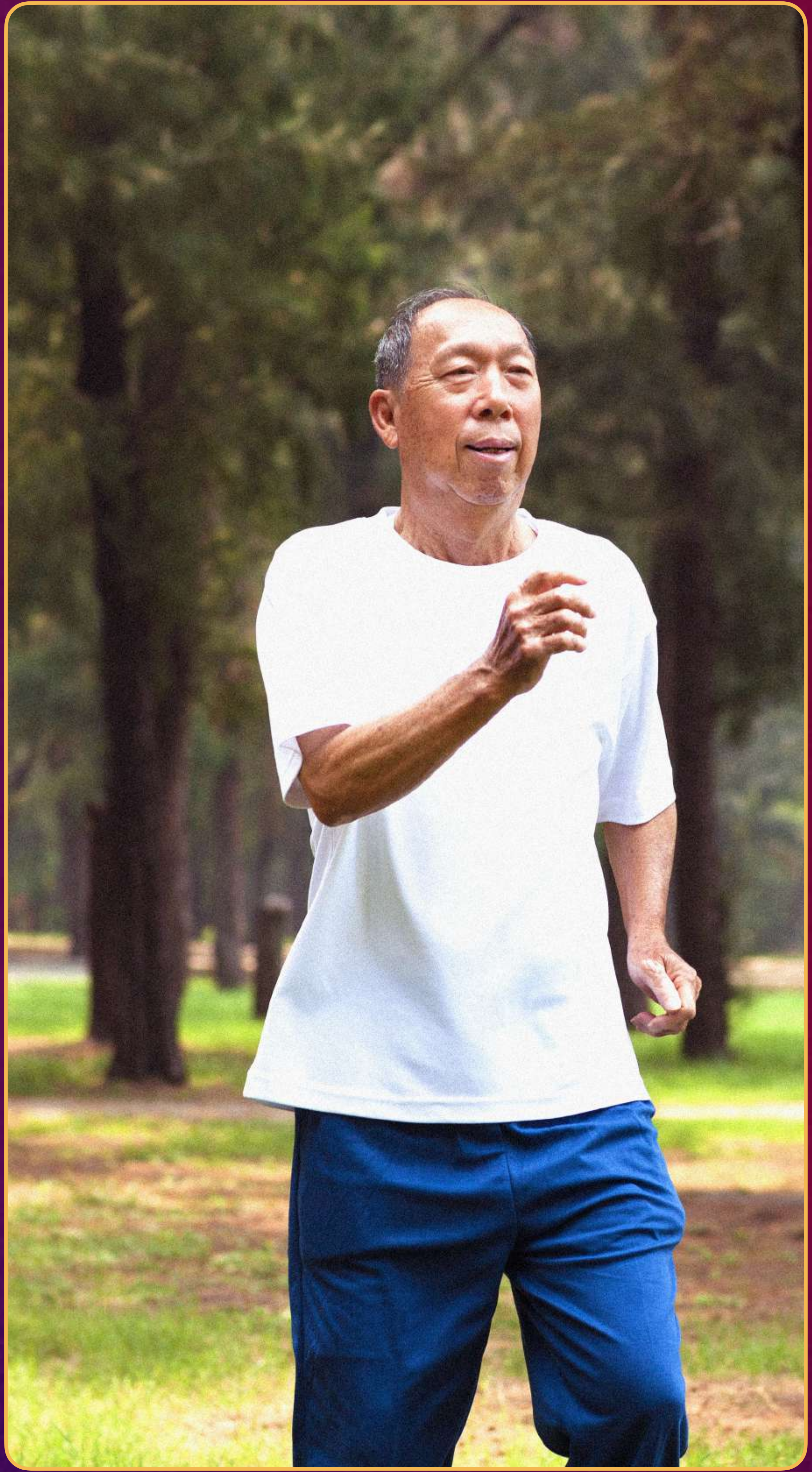
This is a chance to connect with families through joy, not competition. Brands can offer playful, durable product ranges for adults and kids, and support family-focused experiences that encourage movement as a shared routine.

Cardio Confidence

Men embrace running for overall health, with rising interest in its sexual wellness benefits.

In China, interest in running to support male health is growing. Searches for "**running for erectile dysfunction**" are up +60%, with medical influencers on local platforms linking regular cardio to improved circulation, energy levels and confidence.

This is a culturally sensitive but growing space. Pushing too far into male performance messaging risks alienating women and broader audiences. A better approach may be to frame running through the lens of overall health and vitality.



Gentle Stride

Older adults opt for gentle running to improve long-term health and well-being.

A +20% rise in searches for "**which is harder on the knees: running or skipping?**" suggests growing awareness around joint care and safe exercise choices.

More midlife/older adults in China are adopting light running to support heart health, manage stress and stay active.

This group of people has the time, money and motivation to invest in their health. Brands that focus on comfort, injury prevention and consistency can build strong connections. Campaigns built around expert tips and community events help drive long-term loyalty.

Vox Pops

Featuring a runner from China

Brand Visibility

France is a strongly brand-led market (mirroring Germany's 83% emphasis on brands). Nike dominates with nearly half of all brand visibility, while ASICS and national retailer Decathlon succeed with a more balanced split between brand-led and product-led searches.

Top Performers

Nike accounted for almost 50% of brand visibility due to generic searches for Nike and Nike Store, as well as open searches for Nike running products which accounted for 87% of searches. ASICS ranks 2nd, with a more balanced mix of product searches (42%), through searches for its Novablast range.

Overperforming Brands

National retailer Decathlon captured 7% of brand visibility in France, a significantly higher share than in other markets. This was driven by Decathlon's near-even split between brand-led (53%) and product-led (47%) searches, including generic searches for the brand, coupled with an interest in their Kiprun collection.

Search terms

Searches conducted in local languages were translated into English to ensure all relevant brand queries were captured and compared consistently across markets.

France: Running Culture

Hybrid Runs

Runners shift towards hybrid fitness events as they blend running with functional training.

In France, interest in hybrid fitness races is rising fast. Over the past 12 months, searches for "**HYROX**" have surged, while "**survival run**" has increased by +2,000%. This marks a sharp contrast to the previous five years, where neither term saw notable interest.

French runners are now actively looking for training content and event rules – pointing to growing interest in versatile, gym-based race formats that blend endurance with strength.

Relevance

This signals a shift in how people define running. It's no longer just about pure running but multi-discipline performance where running is one part. For brands, this presents an opportunity to design gear that works across different disciplines. Marketing needs to evolve and reflect this hybrid style of movement.

Creator Coaching

Runners turn to local YouTubers for relatable coaching and advice over generic training plans.

In France, searches for local YouTube channels like "**Running Addict**", "**Runwise**" and "**RMC Running**" have surged over the past 12 months. This signals a shift in how runners are finding information – turning away from brand-led content and towards relatable, home-grown creators for training tips, gear reviews and race-day advice.

As more runners search for creators over big brands, there's a clear opportunity for brands to build relevance by collaborating with these trusted local voices within their community.

Force féminine

Female runners drive demand for tailored gear and cause-led events.

In France, searches for “running woman” (+14%), "**ASICS Novablast 4**" and "**Pink October 2024 race**" have all seen strong growth over the past 12 months. The latter two are breakout terms, meaning they've spiked rapidly after little to no prior activity.

Surging interest in women-specific gear and events signals a shift away from unisex products toward tailored solutions that reflect female runners' needs and identity.

Women aren't just asking for better products. They're choosing brands that align with their values and fit their bodies. To connect with this growing audience, brands should focus on delivering inclusion and performance together.

City-run Tourism

Runners turn regional races into lifestyle weekends as they combine sport and travel.

In the past 12 months, searches for "**Toulouse run experience**" have surged, while "**Run in Reims 2024**" is up +500%. This points to growing interest in regional running events across France – not just as races, but as experiences that blend sport, travel and lifestyle.

Brands can position these regional runs as experiences so they can connect more effectively with the French audience.

Vox Pops

Featuring a runner from France

Brand Visibility

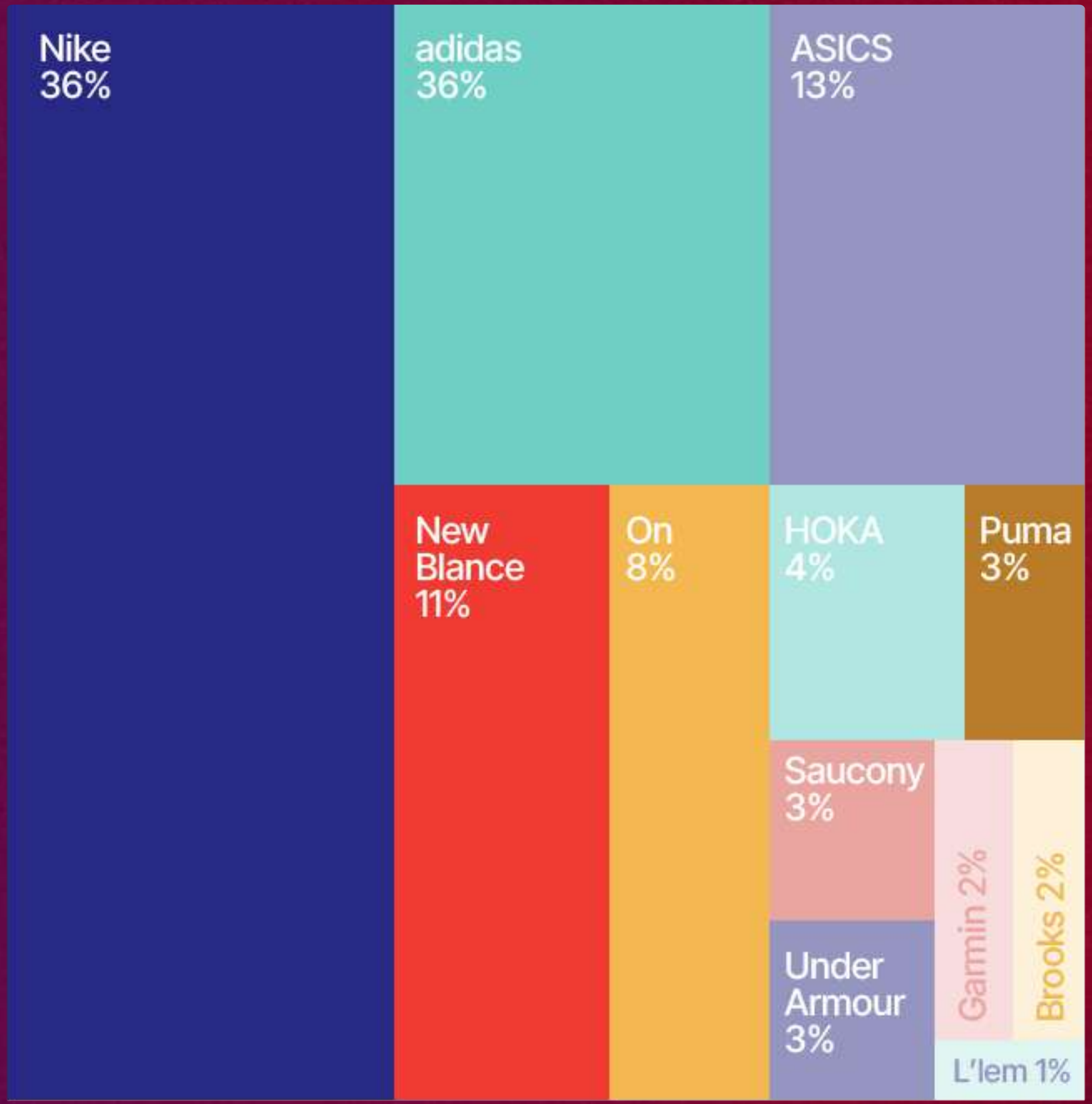
Germany shows the strongest brand loyalty among major markets: 83% of searches are brand related, with Nike, adidas, ASICS and New Balance collectively accounting for 75% of brand visibility.

Top Performers

Brand name searches accounted for the majority of visibility in Germany, but growing interest in specific products – like Nike's Pegasus 41 and ASICS Novablast 4 – helped drive the 17% product-led share. HOKA's visibility stood out (the majority of its presence fuelled by searches for the HOKA Mach 6), offering a contrast to Germany's otherwise brand-dominated landscape.

Overperforming Brands

Several other brands held smaller shares of visibility in the German market, including Saucony, Lululemon and Garmin. Lululemon and Garmin were primarily driven by brand-name searches, while Saucony's visibility was more product-led thanks to interest in its Endorphin Speed 4 running shoes.



Search terms

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Germany: Running Culture

Creator–Coach Culture

Runners turn to relatable YouTube creators over elites for trusted running advice.

Beginner runners in Germany are increasingly turning to relatable YouTube creators for advice, gear tips and training support. Searches for "**running essentials**" on YouTube have increased by +4,400% in the past year and fitness influencer "**Julia Reppel**" has seen a sharp rise in interest.

Rather than looking to elite athletes, runners are now seeking guidance from peers – mid-pack mentors who feel more accessible, authentic and relevant to their own journeys.

Relevance

Authentic YouTube creators are getting ahead of the bigger premium brands by influencing consumer decisions before shoppers even set foot in a store. Brands that partner with credible, community-rooted creators can build trust and long-term relevance.

Sunday Club Boom

Sunday running clubs boom as community and self-care replace competition.

Sundays have traditionally been a day of rest in Germany, with time spent relaxing, enjoying the outdoors and connecting with loved ones. This cultural rhythm aligns with a growing trend: searches for "**Sunday Running Clubs**" have risen by +450% over the past 12 months.

This movement is less about competition and more about tradition, exploring new places, resetting for the week ahead and reclaiming movement as a form of self-care.

This represents a valuable opportunity for brands. Sunday running is a consistent and culturally ingrained behaviour and the rise of these social running groups reflects a broader desire for community, well-being and outdoor connection.

The emphasis on being outside also opens up space for trail-friendly gear, supported by marketing that speaks to peace, nature and recharging through movement.

Zone 2 Zen

Runners embrace low-intensity Zone 2 training as a smarter path to endurance and well-being.

Five years ago, German runners were focused on high-intensity methods, with searches for "**anaerobic training running**" up +1,350%. But in the past 12 months, interest has shifted towards sustainable performance with "**zone 2 training**" up +250% and "**what is pace when running?**" up +60%. This likely reflects a deeper desire to optimise running efficiency and recognise the long-term health benefits of lower-intensity training.

Germans tend to pride themselves on excellence and aim to be the best in their endeavours. For many runners, that now means tracking thresholds and building endurance rather than chasing medals or finish times.

More runners in Germany are embracing smarter, lower-intensity training. It’s a clear behavioural shift towards considered, long-term fitness. Brands have a real opportunity to connect by offering tools, products and guidance that support better recovery, steady progress and overall well-being.

How Influencers are Shaping Running Culture

Influencers are reshaping the running space – making the sport feel more relatable, inclusive and accessible. With race vlogs, training tips and honest reviews, they offer a level of authenticity brand content often misses.

Macro-influencers and media-style creators, e.g. The Running Channel, focus on reach and visibility, often partnering with global brands to deliver campaign-style content. Micro-influencers, by contrast, tend to drive higher engagement through personal storytelling and stronger ties within local or niche running communities.

Influencer partnerships vary widely in form and impact. Long-term collaborations – such as former rugby player-turned elite distance runner Jonny Davies' work with Lululemon – help build trust and reinforce shared values. A standout example is "Run The Capitals", when Jonny ran 960km in 11 days. In partnership with Lululemon and the mental health charity CALM, the campaign aimed to raise awareness about prevention and mental well-being. Jonny shared daily updates, community runs and emotional reflections to ensure content was highly personal and relatable. This went far beyond product promotion. It showed how brands and influencers can co-create powerful, purpose-led content that builds real emotional connections.

Short-term campaigns are tactical partnerships that boost visibility and sales through launches, reviews, discount codes and product-focused content.

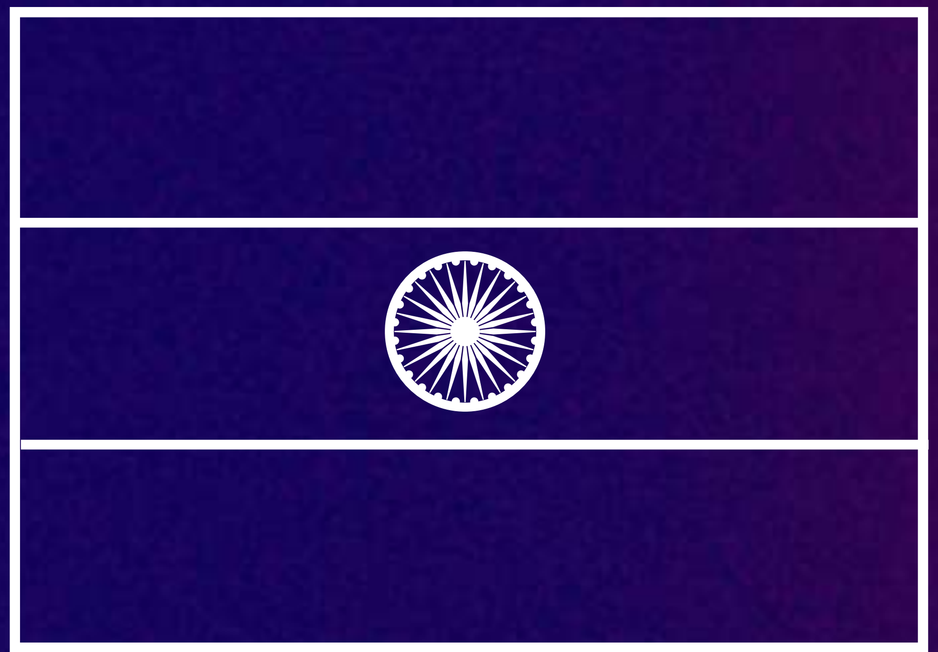
Running clubs create connection and consistency, with influencers playing a key role both off- and online. They also lead inclusive, identity-driven communities built on shared values. A great example is "Runners and Stunners", a female running group founded by Jennifer Mannion and powered by Lululemon. It shows how brands can support diverse audiences through authentic, community-led partnerships.

Runners in different countries engage with influencer and brand content in different ways, shaped by local culture and media habits. In the UK and Brazil, runners often turn to trusted YouTube creators for gear reviews. These influencers are seen as reliable sources of honest and detailed advice that help guide purchase decisions. In Germany and France, where runners prefer mid-pack mentors and everyday voices over elite athletes or global campaigns, local and relatable creators perform better. In Spain, where runners connect most with real, unfiltered training journeys and are less interested in polished brand content, authenticity is particularly important.

In India, Google Trends shows fewer searches related to influencers, but GWI data reveals a highly engaged audience. Indian runners are more likely to follow fitness experts or organisations on social media and are motivated by content that offers inspiration, advice and a sense of community. This shows a clear gap in the market and an opportunity for brands to develop local, influencer-led strategies that meet these needs.

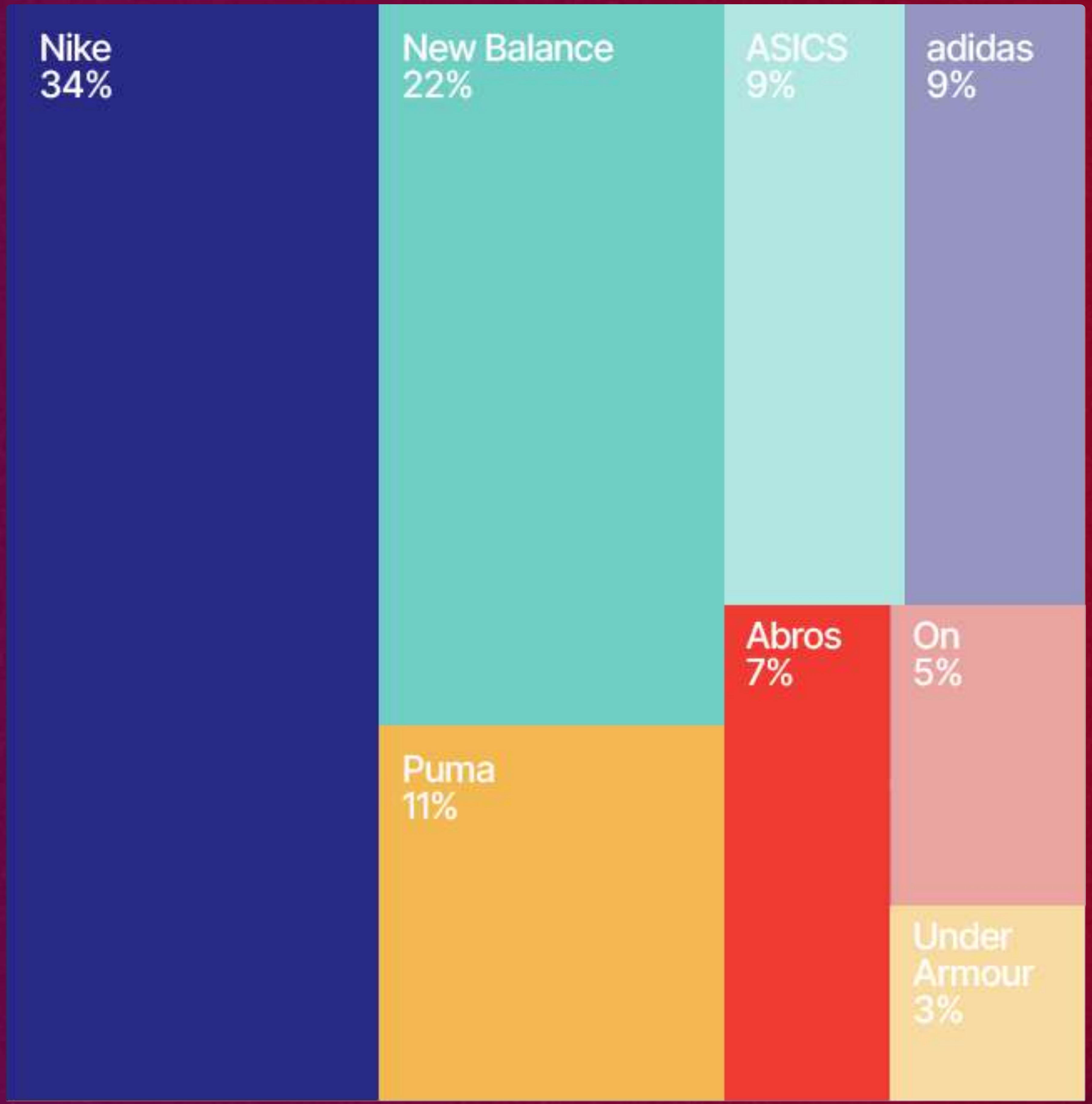
Searches conducted in local languages were translated into English to ensure all relevant brand queries were captured and compared consistently across markets.


580
2023/2024



Brand Visibility

The Indian market is strongly brand-led, yet value-driven local labels, e.g. Abros, still have space to compete alongside global heavyweights. India is also the only market where Nike's visibility tilts more toward product than brand.



Top Performers

Nike maintains #1 spot but shows its highest product-led mix worldwide, thanks to rising searches for the Pegasus, Revolution and Alphafly ranges alongside the core brand term. New Balance also holds strong brand visibility thanks to rising interest in general brand terms New Balance and New Balance running shoes.

Overperforming Brands

Indian sports-shoe company, Abros, maintains a clear presence through simple brand searches – proving that a low-price domestic name can win mind-share even in a market dominated by global giants like Nike, New Balance and Puma.

Search terms

Searches conducted in local languages were translated into English to ensure all relevant brand queries were captured and compared consistently across markets.

India: Running Culture

Home-Grown Brand

Local brand Abros gains ground with runners through pride, price and cultural relevance.

Appearing three times in searches over the past 12 months – but only once in the last five years – "**Abros running shoes**" and "**Abros shoes**" are both up +250% across web and YouTube searches.

Runners in smaller cities are choosing Abros for comfort, style and the pride of buying Indian-made. This surge reflects a wider shift: local brands earning mainstream trust, cultural relevance and everyday visibility once reserved for global names.

Relevance

The rise of brands like Abros reflects a broader shift: local players are gaining ground by being faster to market, more affordable and more culturally attuned. For international brands, staying relevant increasingly depends on how well they adapt to local expectations around style, storytelling and value.

Budget Bro

Budget-minded men drive demand for reliable, affordable running shoes.

Searches for terms like "**best running shoes for men under ₹1000**" are up on average +700% in last 12 months, led by male consumers who simply want good-quality footwear at the right price. They often use the same pair for running, walking and commuting. Brand name, design, performance features or sustainability are not deal-breakers: they want something that works within their budget.

For a growing group of price-conscious male consumers, practicality outweighs performance or brand prestige. They're seeking one reliable, versatile shoe that fits into everyday life – from running to commuting. Meeting these expectations isn't just about affordability, but about earning trust through durability and consistency.

Her First 5k

More women who enter running are searching for gear that fits their needs and stories that reflect their journey.

Top searches on YouTube from runners over the last 12 months featured "**women running shoes**", "**running girl**" and "**girls running**", suggesting that female runners are actively searching for shoes specifically made for them. Campus running shoes for women searches have surged and running girl is trending on YouTube.

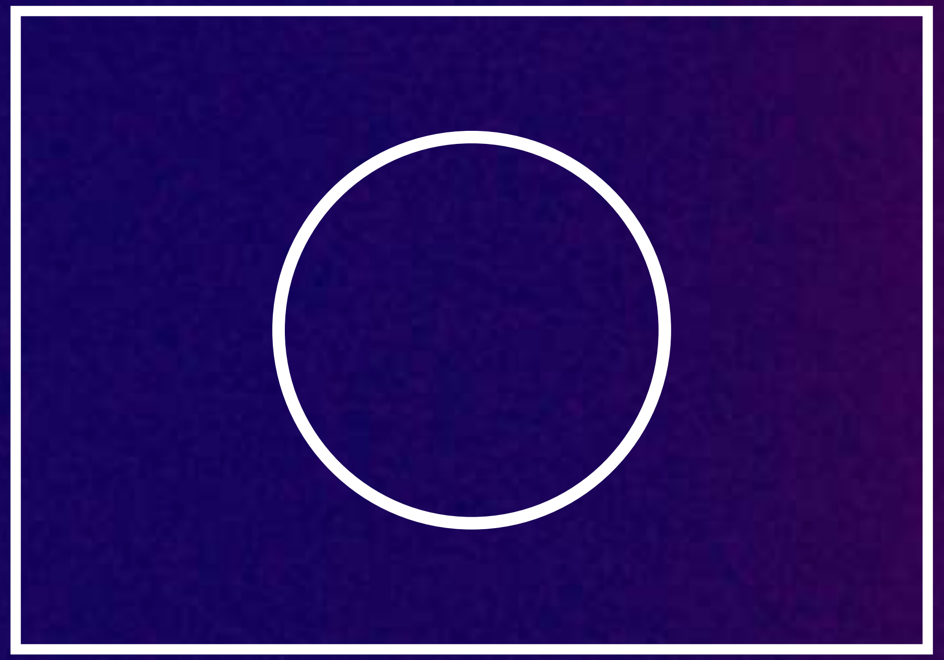
Brands can prioritise fit and comfort for women to help drive loyalty. Campaigns that feature real women, relatable stories and inclusive community events build trust as well as long-term brand relevance.

Family on the Move

Families are running together – driving demand for inclusive gear and shared experiences.

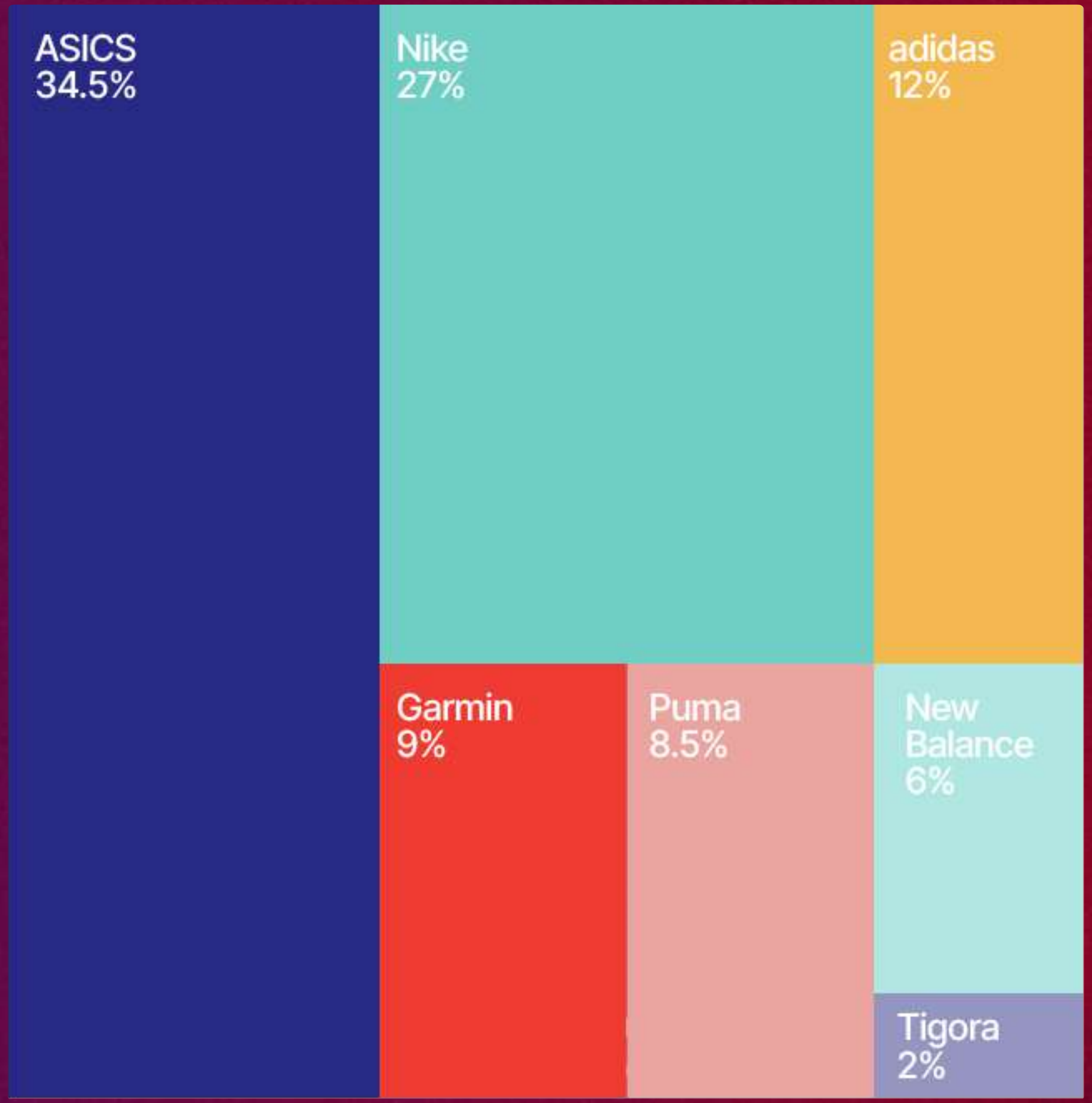
"**Running shoes for kids**" search interest increased by +70% this year indicating that families are starting to make running part of life by getting their children involved as well. It's becoming less about competition and more about fun, health and bonding.

Brands could consider creating playful, durable kids' ranges in bold colours, and partnering with schools or communities to co-develop fun run programmes. Brands can therefore build lasting emotional connections with both parents and young runners.



Brand Visibility

ASICS achieves its highest visibility share in its home market, surpassing Nike, which records its lowest visibility across all regions.



Top Performers

69% of ASICS searches in its home market were brand-led, driven by searches of ASICS and ASICS running shoes. However, strong interest in specific models such as Novablast 5 contributed to a notable 31% product-led share – highlighting a balanced mix of brand awareness and targeted product demand in Japan's largest running brand.

Overperforming Brands

Puma's visibility in Japan stands at 8.5% – its highest across all markets – and is entirely brand-led, driven by a rise in open searches for Puma in both English and Japanese.

Garmin – a brand focused on running smartwatches – has its highest visibility in Japan, driven entirely by brand name searches. This brand focus is likely because runners may be less familiar with individual watch models as they are with running shoe names.

Search terms

Searches conducted in local languages were translated into English to ensure all relevant brand queries were captured and compared consistently across markets.

Japan: Running Culture

The Park is the Platform

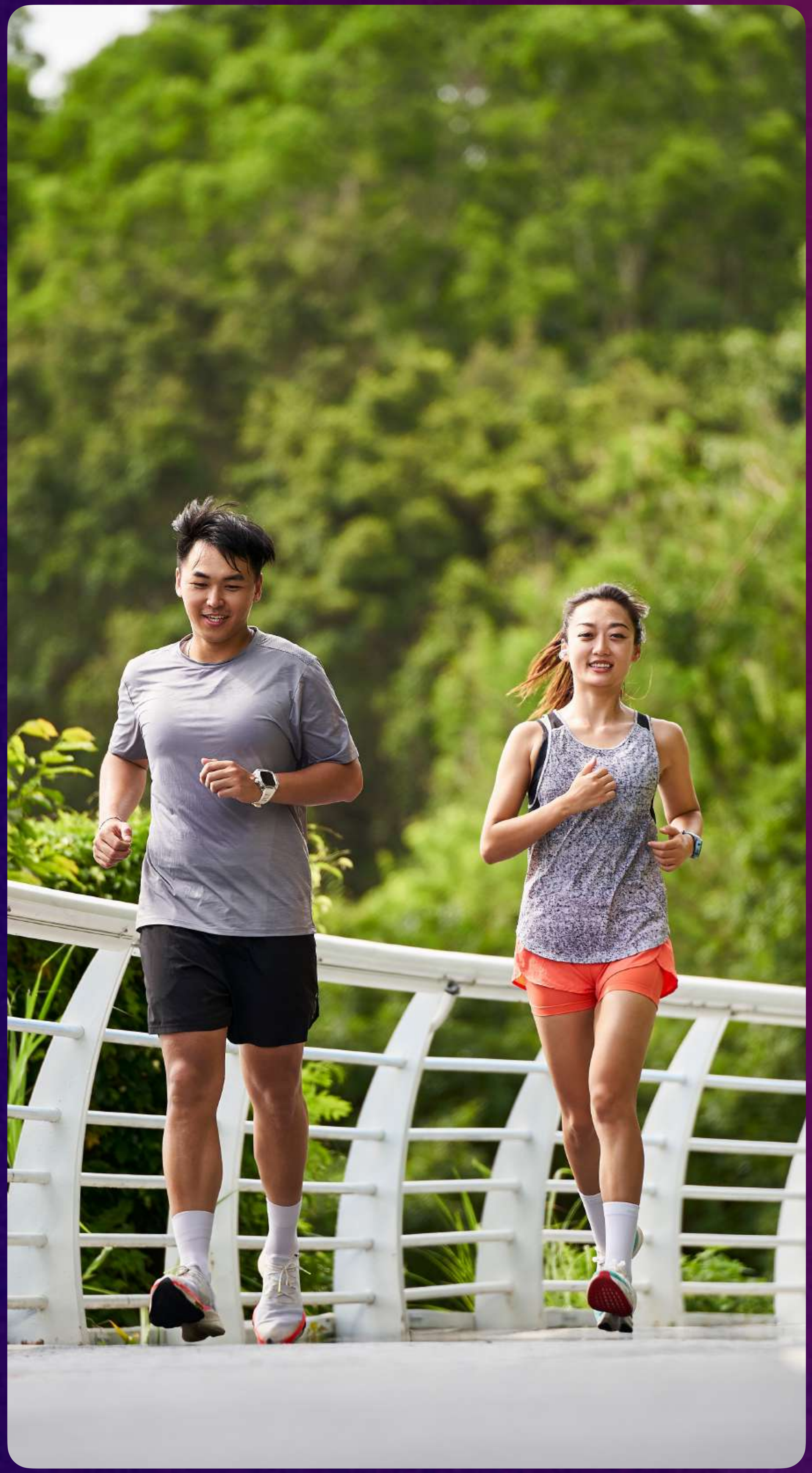
Runners turn city parks into flexible, app-powered run clubs.

An increase in searches for "**Yoyogi Park running**" (+60%) and "**create a running route**" (+50%) over the past 12 months show a growing interest in casual, self-organised running. Runners are using apps to plan loops, track their progress and share routes with others.

While traditional running clubs still have their place, these open park loops offer a more flexible, community-driven way for people to stay active and connect.

Relevance

Brands don't always need to be there in person to be part of the experience. Supporting these popular loops through virtual run clubs, app-based challenges or digital badges can help build strong community ties in a way that feels natural to self-led runners.



Layered for Light

Runners embrace full-kit sun protection as a performance essential.

Searches in Japan for "**running sunburn prevention**" have surged over +1,800% in the past 12 months, with "**running sunglasses**" up +2,800% and "**running cap**" up +3,100% over the past five years. This points to a clear shift from interest in individual sun protection items to a broader focus on complete sun protection solutions.

Sun protection has become a non-negotiable part of running, as more runners prioritise health, comfort and performance during outdoor activity. Brands can stay relevant by offering UPF-rated fabrics, breathable accessories and sun-focused product bundles.

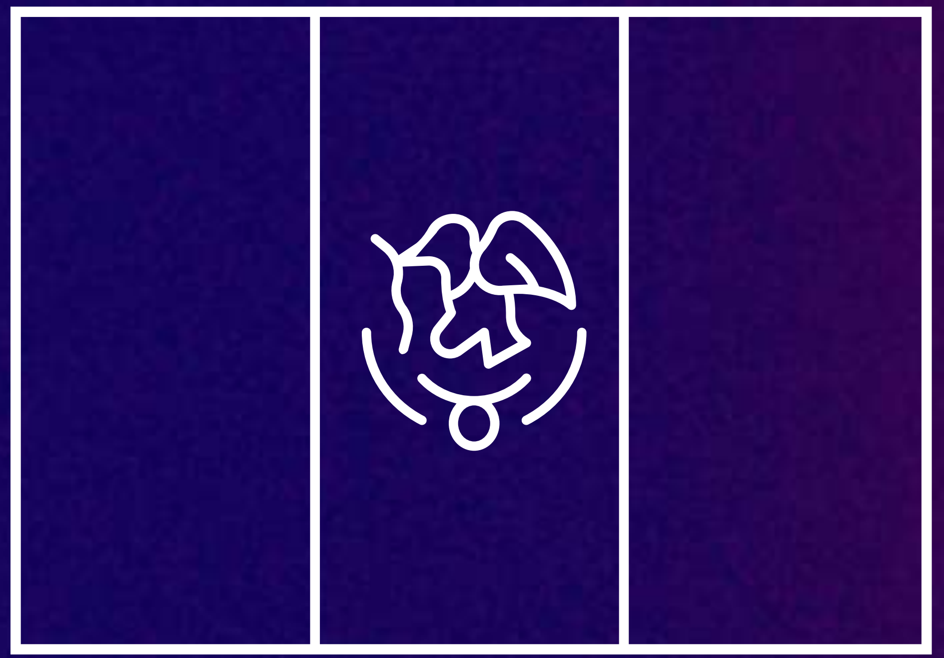
Beginner Boom

A surge of beginner runners drives demand for trusted guidance and gear.

Over the past year, searches for "**running for beginners**" (+40%), "**how to run faster in a relay**" (+300%) and "**running tips**" (+40%) have all seen sharp increase – pointing to a growing focus on learning and self-improvement among runners.

These trends suggest growing interest in the fundamentals of running, likely driven by beginners looking to build healthier habits through physical activity and finding trusted gear to help them get started.

Beginner runners represent a key opportunity to build long-term brand relationships in Japan, where trust in a brand often carries more weight than product features alone.



Brand Visibility

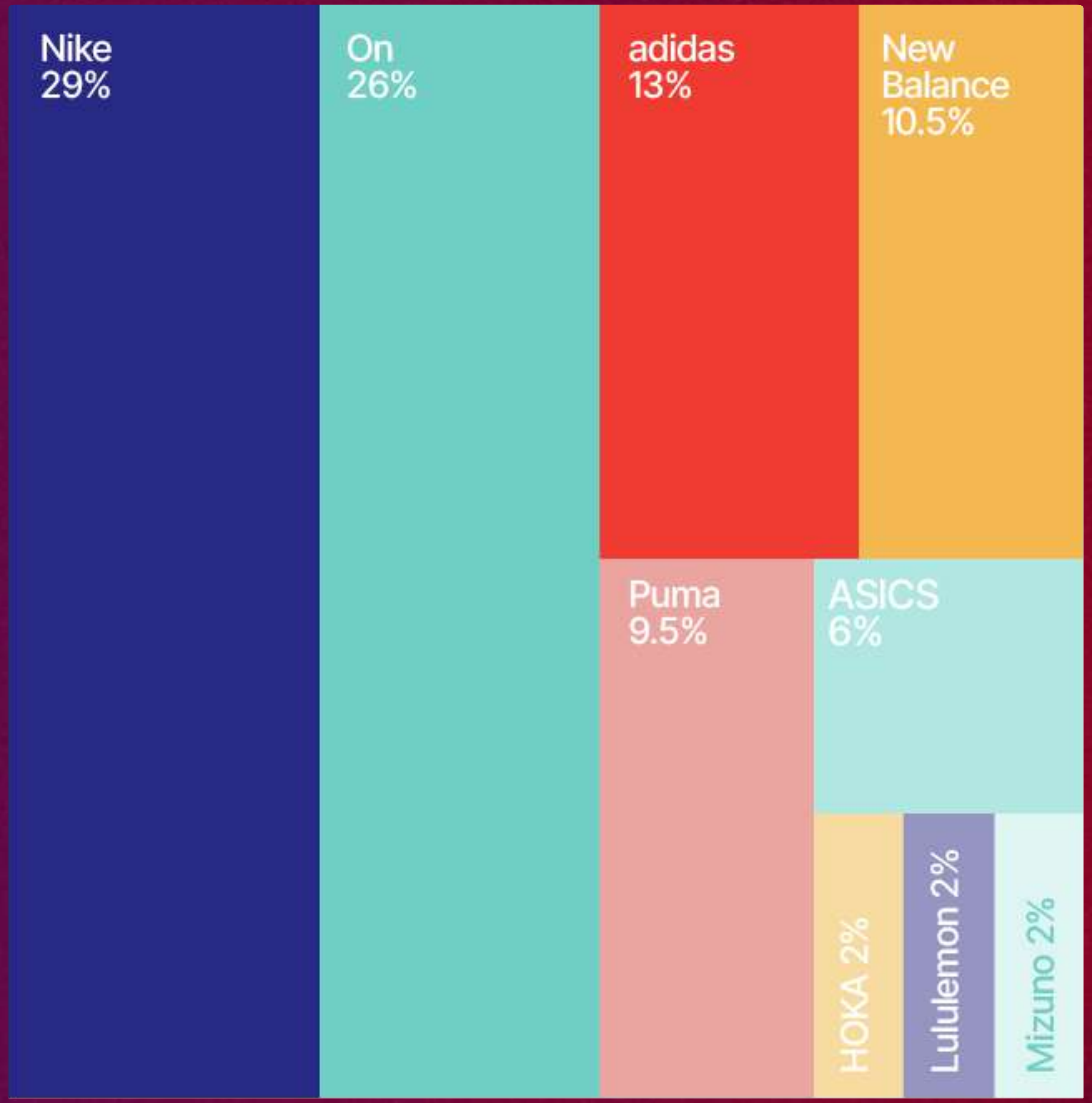
On is challenging Nike for top spot with some of the strongest competition across all markets. While the landscape remains predominantly brand-led, On's surge is being driven by product searches – showing its potential to overtake Nike.

Top Performers

Nike still holds #1 spot and is 72% brand-led, driven by mass searches for terms like Nike and Nike Store. In contrast, On's visibility is more product-led, fuelled by interest in its Cloud and Cloudmonster ranges. On's consistent and memorable product-naming appears to have resonated particularly well with the Mexican audience, a market where the brand's visibility is currently at its highest.

Overperforming Brands

New Balance and ASICS have followed a similar product-led path to On, with surging interest in New Balance 530 and ASICS Novablast 4. adidas, however, holds more overall visibility than both – fuelled entirely by brand-driven searches. focus is likely because runners may be less familiar with individual watch models as they are with running shoe names.



Search terms

Searches conducted in local languages were translated into English to ensure all relevant brand queries were captured and compared consistently across markets.

Mexico: Running Culture

Run-fest Retail

Retail events turn running gear discovery into social, community-led experiences.

Searches for "**Running Fest Liverpool 2024**" (in-reference to an event hosted by the Mexican department store named 'Liverpool') increased by 950% and "**INNOVASPORT**" by 600% have risen sharply in the past year, showing how retail is evolving into an experience.

Community-led activations are turning shoe shopping into events – blending product discovery with fitness culture and changing how people connect with sports brands.

Relevance

Retail is no longer just transactional but social and immersive, too. Brands can co-create festival-style activations with try-ons, gait analysis and live content. Use these moments to grow loyalty apps and turn browsers into long-term fans.

She's Powered On

Women drive On's growth, drawn to its mix of style, comfort and identity.

Over the past five years, On's growth in Mexico was largely driven by male consumers, with searches like "**tenis On Running hombre**" rising by +1,400%. But in the past 12 months, that momentum has shifted – searches for female-focused terms like "**tenis On Cloud mujer**" have climbed +190%, suggesting more women are choosing On for its mix of performance, style and everyday comfort.

The brand is increasingly resonating with women who see activewear as part of their daily identity – balancing fitness, fashion and city living.

This is not only about product fit but also about emotional connection. Women are looking for gear that reflects their lifestyle and brands that speak to their values. Developing women-specific collections, sharing real stories through female coaches and building inclusive communities will lead to stronger long-term loyalty.

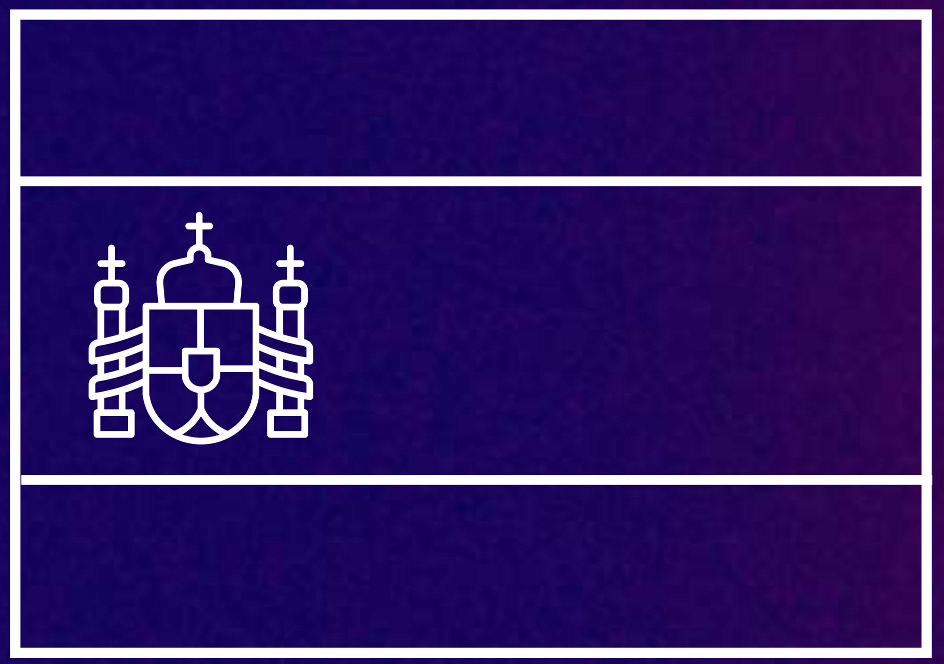
Dawn Patrol

Morning runs are rising as a daily ritual, driving demand for versatile, feel-good gear.

"**Morning run**" and "**run to live**" searches rose by +110% and +90% respectively. More people are looking to start their day with a run, possibly in a public park, using this time to reset and clear their minds before work.

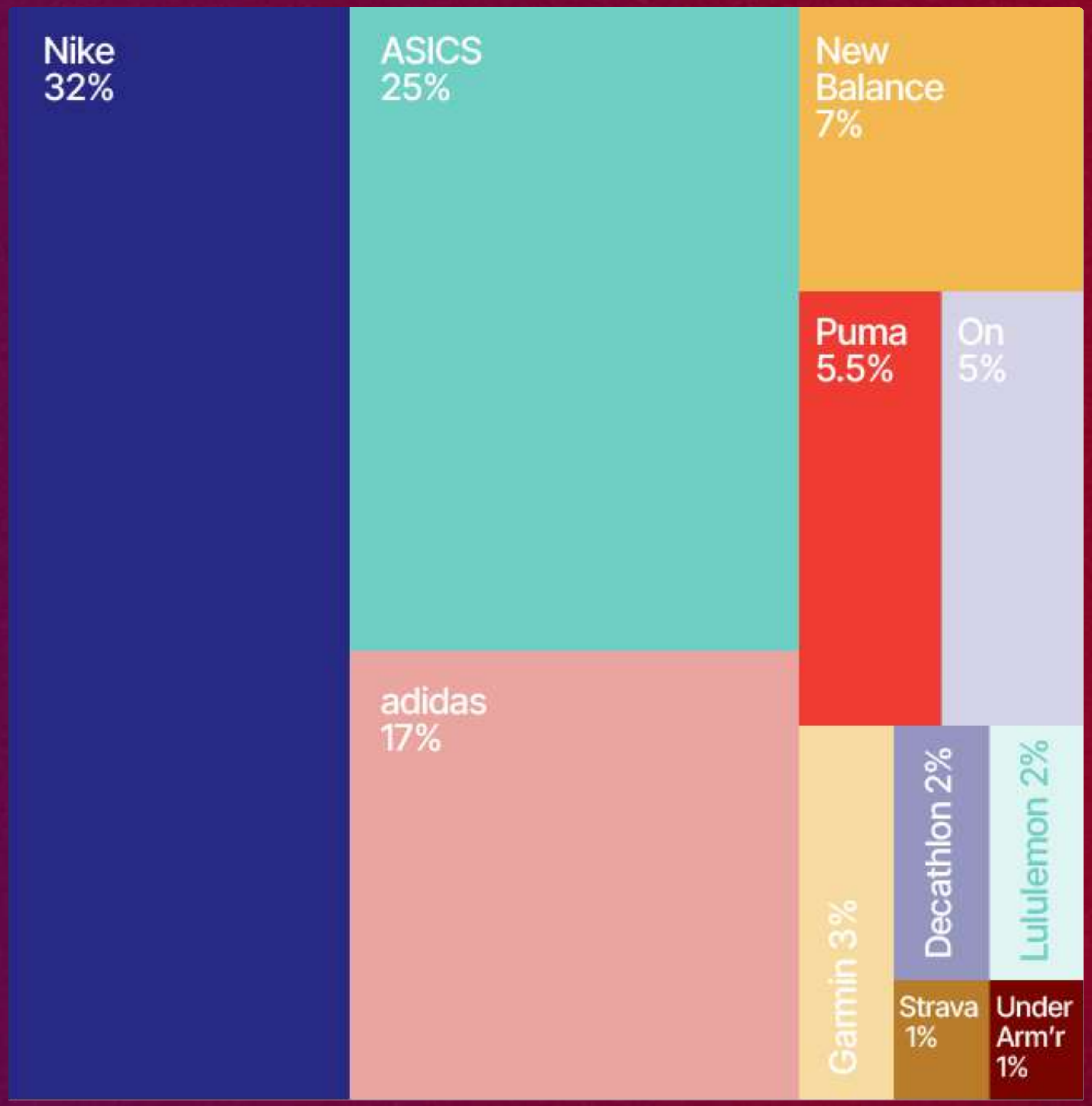
This lifestyle creates demand for breathable, quick-dry clothing, easy-to-wear footwear and smart-looking gear that can transition into the workday. Brands can tap into this habit with morning-focused campaigns, community park runs and messaging that reflects energy, well-being and daily confidence.


Carrera por la Juventud Vol.2
1



Brand Visibility

Spain is the most product-curious market and its rankings most closely mirror the global picture, with the top four – Nike, ASICS, adidas, New Balance – accounting for over 80% of the market's brand visibility.



Top Performers

Unlike other markets, where some brands are almost entirely brand-led, each of the top four brands in Spain sees a more balanced mix of brand and product searches driving visibility. New Balance (71%), Nike (62%) and adidas (56%) lean more towards brand-led searches, while ASICS stands out with 66% of its visibility driven by product interest – particularly in the Novablast, Superblast and Gel Nimbus ranges.

adidas captures 17% of brand visibility in Spain, comfortably ahead of its global position where it trails just behind New Balance. With a higher-than-average proportion of product-led searches, adidas benefits from strong brand recognition while also driven by flagship products like Supernova and Duramo.

Overperforming Brands

Search terms

Searches conducted in local languages were translated into English to ensure all relevant brand queries were captured and compared consistently across markets.

Spain: Running Culture

Together on the Tarmac

Local running clubs boom as runners seek community and brand-led connection.

Over the past 12 months, web searches in Spain for "**Oysho running club**" have increased by +2,450%, “running club” by +80%, and "**Deporvillage**" has seen a sharp rise in interest. This points to a growing movement of runners seeking out local clubs – many of them led by retailers or fashion-sport brands like Oysho.

After years of solo, app-based training, more runners are turning to community-led experiences for motivation, connection and a sense of belonging.

Relevance

Running clubs are becoming brand spaces. Rather than relying on one-off activations, brands can build ongoing communities that serve as retail touchpoints and content creators. This will keep engagement high and audiences loyal.

After-Dark Running

Evening races on the rise, combining exercise with culture, community and nightlife energy.

More runners in Spain are signing up for night-time events that feel more like festivals than races. This is reflected in rising search terms like "**Seville night race**" (+800%), laser run (+110%) and "**trail running**" which has moved from the top 15 search terms to the top 10 over the past five years.

These events suit Spain’s warm climate and late-night lifestyle, offering cooler temperatures, a party-like atmosphere and a social finish-line experience.

Night runs are a chance to blend performance with nightlife. Brands can respond with reflective apparel drops, LED-friendly race gear and activations around post-race events that feel fun, energetic and culturally on point.

Female Fashion & Finish Lines

There is a rising interest in female-only events and running gear as more women get into running.

Searches for "**Running shoes for women**" remain dominant across both five-year and 12-month data. Interestingly, over the past 12 months, searches for "**Carrera de la Mujer**" (+130%) and "**running glasses for women**" (+80%) have seen strong growth in search interest.

This highlights a rising interest in performance-focused running accessories as well women-specific events that create welcoming spaces where women can run together.

Brands that support these events through inclusive messaging and women-led partnerships, alongside products designed around genuine female performance, can tap into changing attitudes to build deeper emotional connections and long-term trust with female runners.

Creators in Motion

Runners connect more with real, relatable creator content than polished brand ads.

Over the past 12 months, Spanish runners have shown growing interest in content creators who offer authentic experiences and detailed product advice. Searches for "**TRAILRUNNINGReview**" and "**Correr una Maratón**" have risen sharply, reflecting demand for in-depth, story-led content – especially on YouTube.

This marks a shift in trust toward peer-led voices and relatable running journeys over polished brand campaigns.

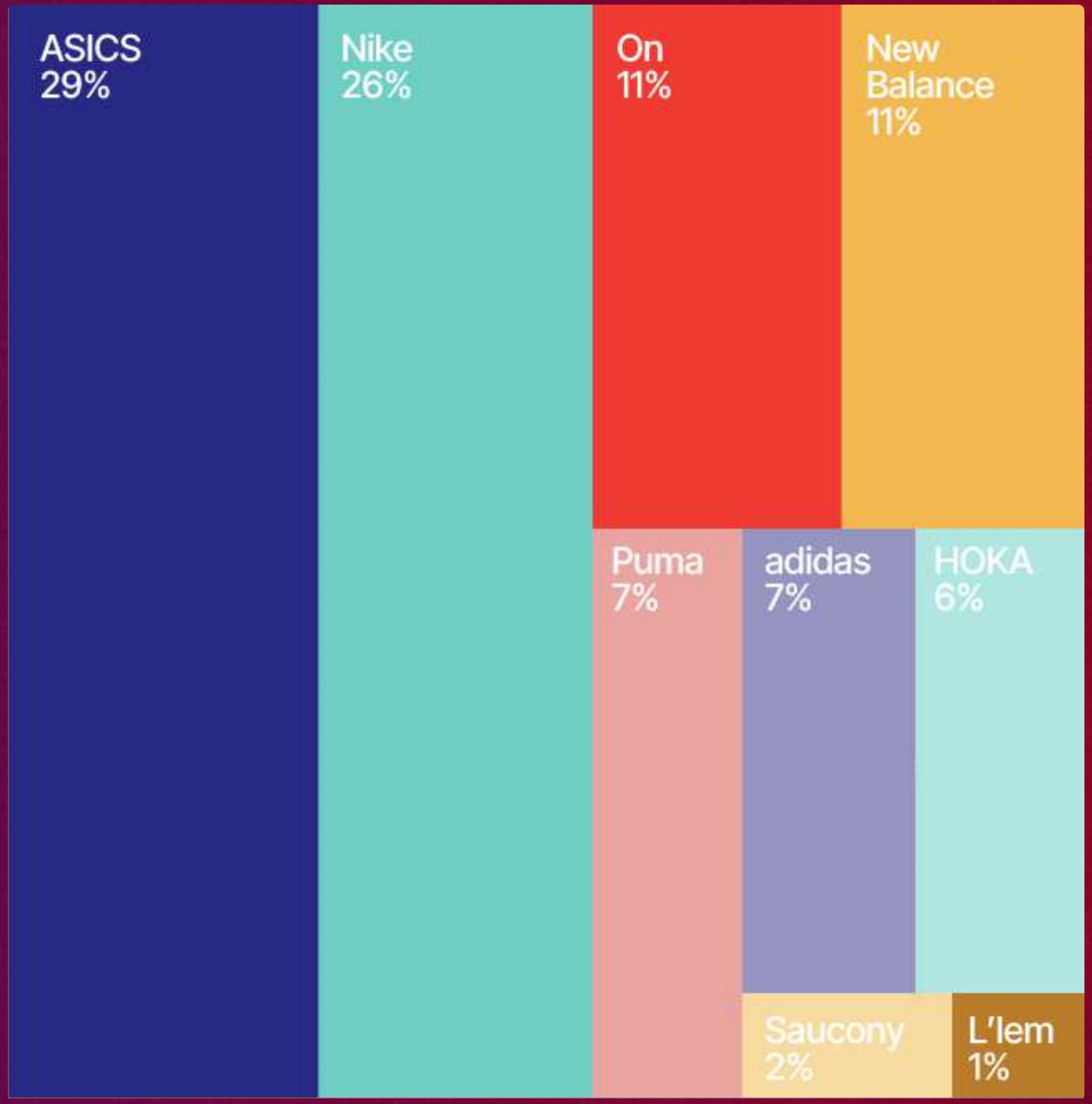
Spanish runners are looking for stories they can connect with, not just tips or polished highlights. Flawless ads and influencer posts are no longer enough. Brands that share real progress, personal challenges and consistent effort can build stronger emotional connections.

Vox Pops

Featuring a runner from Spain

Brand Visibility

The UK market is mostly brand-led, although rising interest in a variety of ASICS products has been integral to outperforming Nike's brand visibility.



Top Performers

ASICS climbed to the top due to rising demand for their Novablast, Superblast and Gel Nimbus ranges, giving the brand a majority (64%) product-led profile. Nike remained a close second but leans heavily on master-brand searches such as Nike, Nike Store and Nike Running (which account for 78% of its visibility).

On has captured 11% of UK visibility – +23% higher than its global share – driven entirely by brand searches. This contrasts sharply with Mexico, where On's visibility is highest and largely powered by model-specific queries for the Cloud range, despite Mexico and the UK having identical overall brand-led vs product-led splits.

Searches conducted in local languages were translated into English to ensure all relevant brand queries were captured and compared consistently across markets.

United Kingdom: Running Culture

Creator Gear Reviews

UK runners turn to YouTube creators for trusted gear reviews before buying.

People in the UK are following and looking to creators like Ben Parkes over a general running website on social media for their running information. There has been a +1050% increase in searches for "**Ben Parkes**" over the last 12 months and +200% increases in searches for "**running channel**" and +4000% increase in "**running shoe reviews**" over the last five years.

This shows that users are seeking out reviews on shoes and are likely to get their opinion before making a purchase if it comes from someone they trust. Users feel more connected with the reviewer as they can see them reviewing it.

Relevance

Brands should seek out these trusted creators/ reviewers and work or collaborate with them to gain credibility more effectively than through standard online advertising methods, e.g. display ads.

Offering an affiliate link or even an exclusive offer could even drive traffic to the gear they promote.

Prime to Perform

Runners look to YouTube for warm-up and recovery advice.

In the past 12 months, interest in running preparation has grown significantly. Searches for "**cool down exercises**" and "**warm up before running**" have surged, while "**pre-run stretches**" has seen a steady increase (+50%).

This points to a growing number of runners actively looking for ways to improve technique, avoid injury and make running more enjoyable. YouTube content now dominates Google search results for these queries, highlighting the role of video in guiding everyday routines.

As more runners seek guidance on warmups, cool downs and running technique, there's growing space for brands to play an educational role. Creating useful, expert-led content not only meets this demand but also builds trust – helping position the brand as a go-to resource while naturally directing attention to relevant gear.

Women-fit Wave

Women's running gear searches rise, driven by demand for better fit and female-focused design.

There has been a significant increase in searches for "**running shorts women**" (+80%), "**ASICS running shoes women**" (+50%) and "**women's sneaker**" (+70%) over the last 12 months. This indicates a growing interest in and market for female-specific running designs and content.

Likely driven by a social shift towards mass participation and people getting into running since COVID-19, this has shown itself on socials as and through influencers and run clubs sharing their experiences as "real" females getting into running and learning to be kind to oneself while doing so.

Evidence suggests this isn't a passing trend as more and more women in the UK participate in running. It's important that brands cater for all sizes and every fit. Some users have reported that a better fit is important: they don't want shorts or leggings to slide down on a run. Brands that have a specific fit-first focus on women runners, e.g. Oiselle, gain a sense of loyalty from users.

Running the First Mile

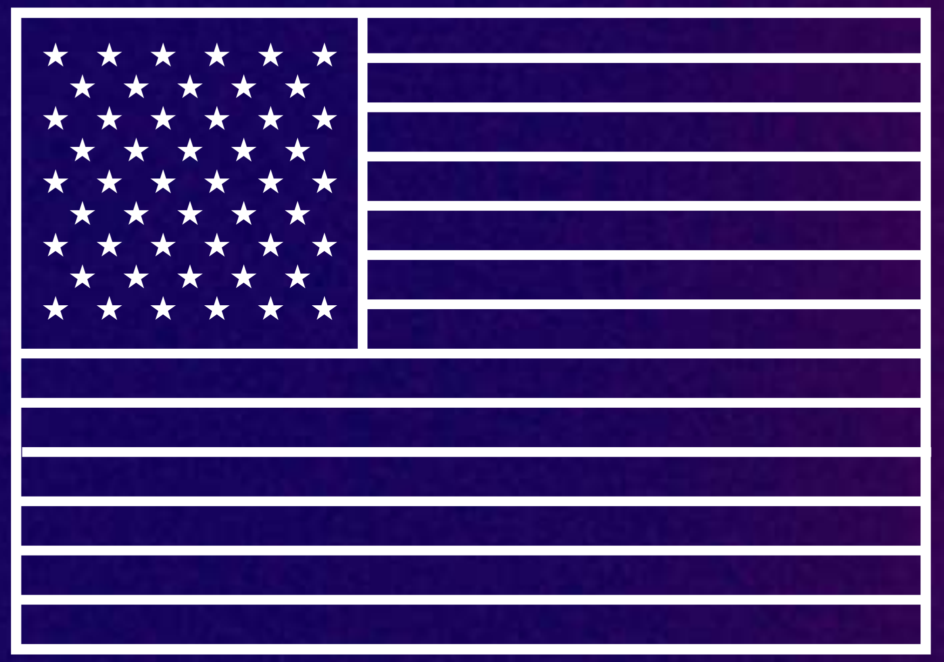
Beginner runners drive search growth, seeking guidance and confidence over performance.

YouTube has seen a sharp rise in search interest around "**beginner runners**", especially "**start running for beginners**" (+110%) and "**5k runs near me**" (+50%) have increased significantly over the last 12 months. It's an indication that this running boom is being driven by first-timers, not finishers. These runners are looking for gear, but also guidance to help them gain confidence outside of competition.

With attention shifting from elite club athletes to everyday runners, there's growing value in storytelling that reflects real experiences. It's less about technical specs and more about how gear makes people feel – the confidence to start, the motivation to keep going, the belief that running is for them.

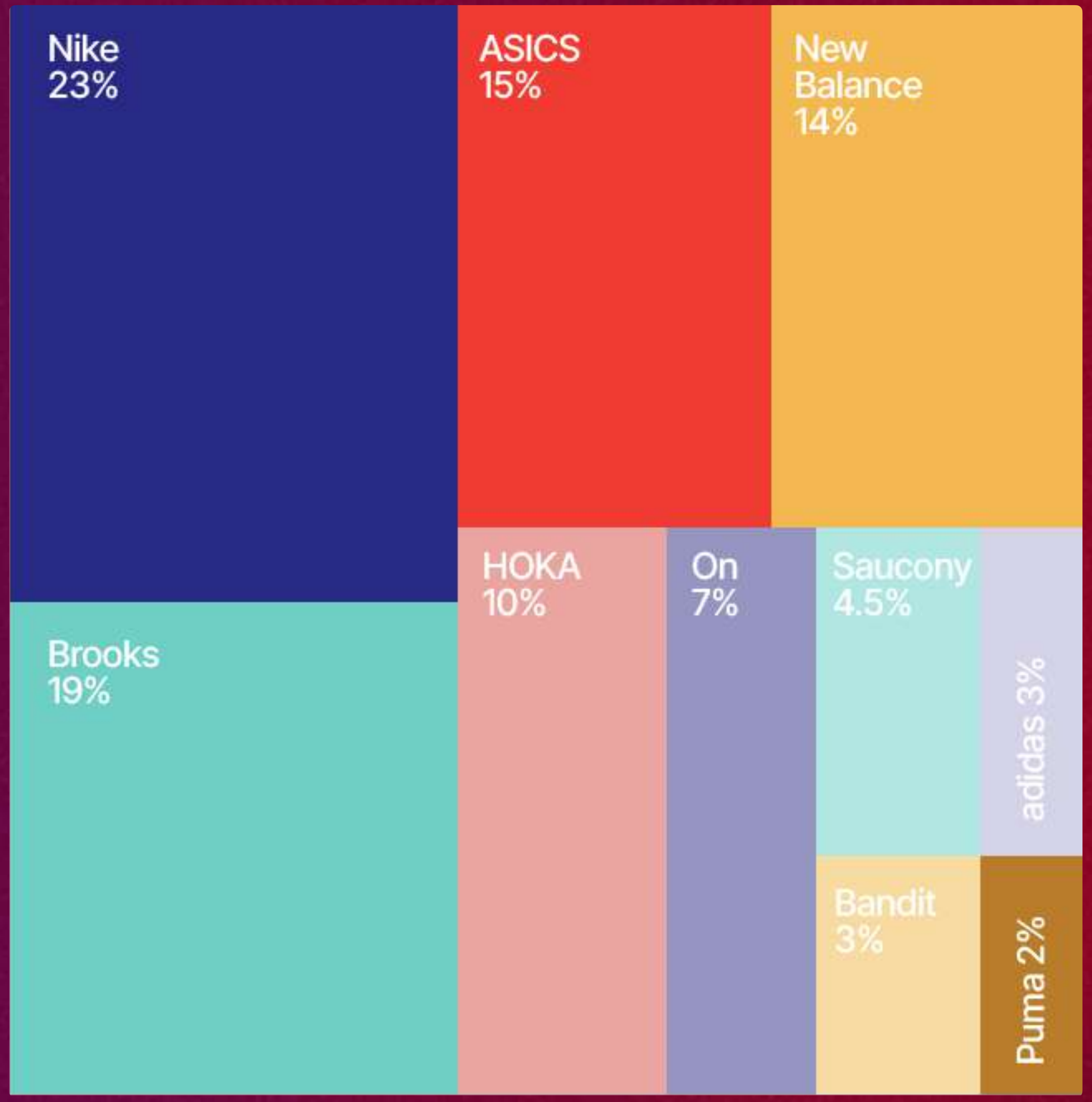
Vox Pops

Featuring runners from the United Kingdom



Brand Visibility

Nike ranks #1 overall thanks to its strong brand presence, though its visibility share is lower than in most other markets. The US running market is mostly brand-led, however some of Nike's share is being eroded by product-led competitors like Brooks and ASICS.



Top Performers

Nike's visibility is entirely brand-led, driven by searches for terms like Nike, Nike Running and Nike Store. In contrast, Brooks and ASICS are 87% and 54% product-led, respectively, with visibility driven by rising searches for specific running shoes.

This contrast suggests that while Nike maintains a dominant brand presence in the United States, other brands are using strong product demand to build their visibility and compete with Nike.

HOKA captures 10% of US visibility – about four times its worldwide share. A mix of brand searches and fast-rising product terms like "Mach 6" shows the brand is winning in both awareness and innovation as it shows the brand is winning in both awareness and innovation, while the US cements its place as the second-most balanced market for brand-led vs product-led demand.

Overperforming Brands

Search terms

Searches conducted in local languages were translated into English to ensure all relevant brand queries were captured and compared consistently across markets.

USA: Running Culture

Kit Stacking

American runners build full gear stacks, using kit to optimise performance and express identity.

Searches for "**GPS watch**" (+650%) and "**best running shoes 2025**" have both risen sharply in the past 12 months. Notably, "**best running shoes [year]**" has consistently surged on YouTube from 2022 through to 2025 – indicating more than just seasonal curiosity.

For many runners, researching and evaluating gear has become a ritual – a recurring part of how they engage with the sport.

Relevance

The American runner is assembling the "best" gear to optimise their performance. From the right shoes to the right Strava segment to the right watch, this stacking of kit reflects a mindset of self-optimisation through tools that quantify progress.

For brands, this means value is judged not on performance alone but on how well a product integrates with an existing kit or tech stack. Brands should position themselves across social media and search not as standalone products but as integrated performance tools.

Club-Run Revival

Runners shift from solo goals to social run clubs, prioritising community over competition.

An increase in searches for "**run clubs near me**" (+200%) and "**5km runs near me**" reflects a broader shift in running culture.

Runners are moving away from individual performance goals like PBs and races towards community-driven, experience-based local participation. People are actively choosing connection and enjoyment over metrics in their running behaviour.

Belonging and community are becoming central to the running experience through local runs and small-scale events.

Brands should look to get involved in these events, either by participating or helping support the ecosystem. These initiatives are often low cost but carry high social value.

Her-Spec Products

Women in the US drive demand for running gear designed specifically for female fit and performance.

An increasing number of women in the US are no longer settling for gear designed around the male body.

They're actively searching for products that fit comfortably and perform well, as shown by a sharp rise in searches like "**running vest women**" (+70%), "**running shorts women**" (+40%) and "**running shoes women**" (+200%) over the past 12 months.

This isn't a small shift. It signals a mainstream change in how US women approach purchasing decisions. They're seeking purpose-built products and expect brands to evolve with them. Those that don't risk losing cultural relevance.

Indie Kit Buzz

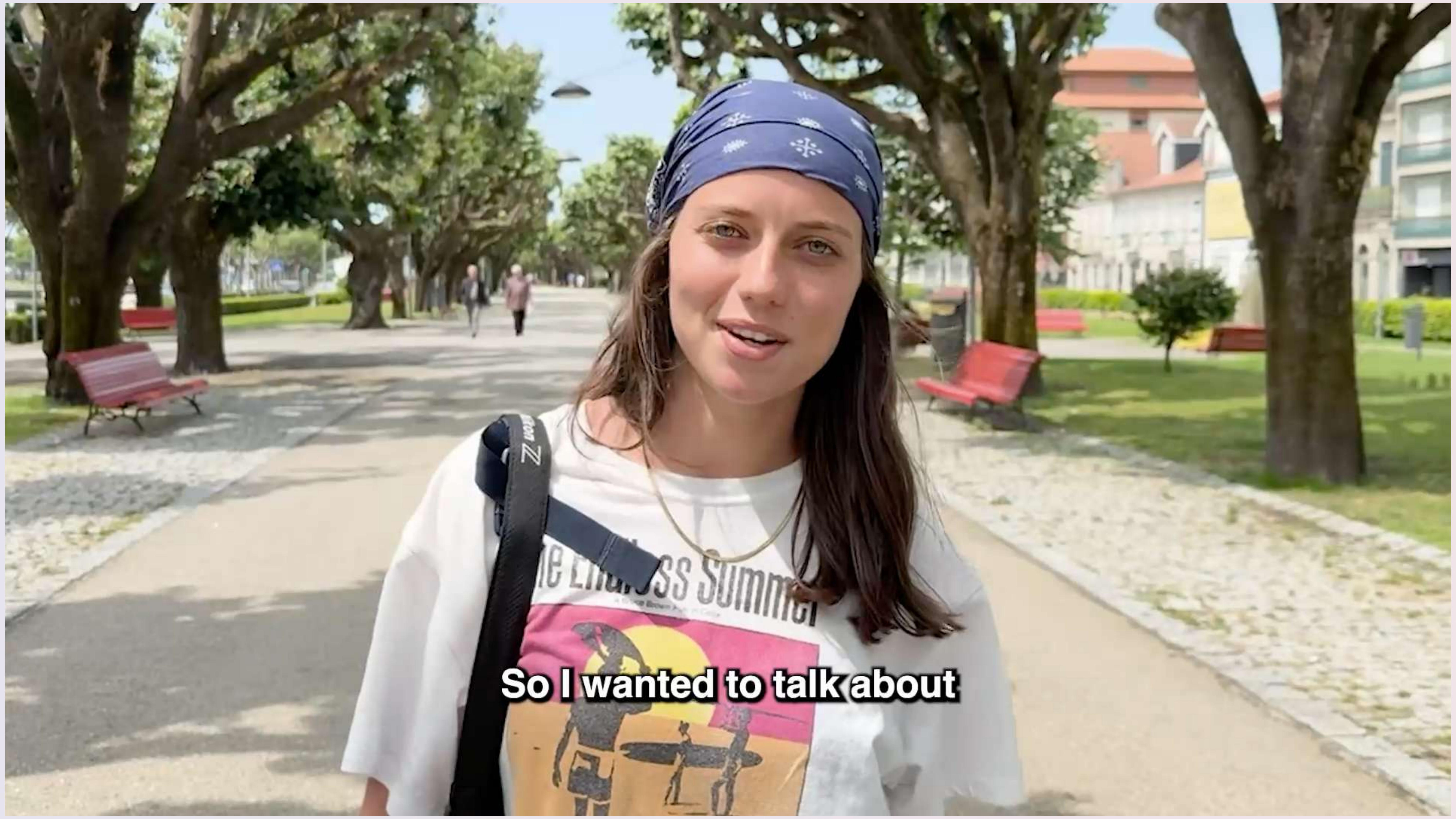
US runners turn to indie running brands that reflect personal values over mainstream performance labels.

Runners are increasingly searching for independent running brands such as "**Bandit Running**" (+70%) over the past 12 months and "**Tracksmith**" (+300%) and "**satisfy running**" (+300%) over the past five years.

This shows US runners are moving away from mass-market kit towards independent, niche, community-led brands that feel more aligned with personal identity than pure performance metrics.

Runners are looking for gear that makes a statement, something with a clear point of view – whether that's sustainability, gender expression or broader cultural relevance. Brands can collaborate with these smaller independents to tap into that sense of meaning and connect with runners on a deeper level.

Vox Pops



Featuring a runner from the USA


Lois Stobbs
Veterans Day 10K
115

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