

Globalization, digital influence, and local market screening: Evidence from half-marathon running footwear choices

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Abstract:

The globalization of the sports industry and the rapid expansion of digital communication environments have profoundly changed consumer behavior in sport-related markets. Running footwear is a particularly dynamic segment of the sports equipment industry, where global brands, technological innovation, and digital information sources shape purchasing decisions. However, the extent to which global market trends are reflected in local recreational running communities remains insufficiently explored. The aim of this study was to examine the distribution and temporal dynamics of running footwear brands among recreational runners participating in a local running event and to assess whether global market trends are reflected in local consumer choices. Data were collected through systematic observation of footwear brands worn by participants in the 5 km race held as part of the Osijek half-marathon event in Croatia. The dataset included eight consecutive editions of the event from 2018 to 2025, covering a total of 2,284 runners. The analysis employed descriptive statistics, linear regression trend analysis, Pearson correlation coefficients, and hierarchical cluster analysis using Ward's method. The results show that two global brands – Nike and Adidas – consistently dominate the observed sample, accounting for approximately two thirds of all observed footwear choices. At the same time, smaller performance-oriented brands such as Saucony, Brooks, and Hoka show gradual growth over the analyzed period. Trend analysis indicates increasing diversification of brand presence, while correlation patterns suggest competitive substitution between dominant brands. The findings suggest that although global market leaders maintain strong positions, local running communities selectively adopt emerging brands, reflecting processes of glocalization and local market filtering. These results contribute to sport marketing and sport management research by illustrating how global industry structures interact with local consumption patterns in recreational sport contexts.

Keywords: recreational runners, global sport markets, sport consumption, consumer behavior, sport marketing

Introduction

The globalization of the sports industry has transformed sport into a transnational economic and cultural system where production, distribution, communication, and consumption increasingly operate across national borders. In contemporary sport markets, globalization is reflected in the expansion of multinational corporations, global sponsorship networks, and international media ecosystems which intensify competition for consumer attention and spending. These processes can be understood as transnational flows of capital, technology, people, and cultural meaning (Appadurai, 1996). Within the sportswear and running footwear sector, globalization has contributed to the emergence of highly concentrated market structures, with a limited number of global brands maintaining structural advantages through economies of scale, technological innovation, and global marketing infrastructures (Andrews & Ritzer, 2007; Giulianotti & Robertson, 2007). Large multinational sportswear companies invest heavily in research and development, global marketing campaigns, and athlete sponsorship programs, which strengthen their brand visibility and market influence across different regions. Recent research also highlights that digital platforms, global media ecosystems, and transnational marketing networks increasingly accelerate the diffusion of sport products and brand meanings across geographic boundaries (Giulianotti, 2023).

However, globalization does not necessarily result in complete homogenization of consumption patterns. The concept of glocalization explains how global products and meanings are interpreted and adapted within specific local contexts, producing hybrid consumption outcomes (Robertson, 1995). In sport markets, local factors such as retail availability, income levels, pricing structures, and community norms can significantly influence how global trends are adopted and diffused. Consequently, although global sportswear brands dominate many international markets, their actual distribution within local recreational sport communities may vary depending on local market conditions and consumer preferences (Smith & Stewart, 2010).

Digitalization further amplifies globalization processes by transforming how sport consumers access information and interact with brands. Networked media environments restructure sport consumption through interactivity, data exchange, and platform-based visibility (Hutchins & Rowe, 2013). Digital technologies increasingly shape how consumers search for product information, evaluate alternatives, and share experiences with other sport participants (Ko, Kim, & Valacich, 2022). Recent research confirms that digital media environments significantly influence sport consumer decision-making and engagement, particularly through interactive platforms and user-generated content (Kim, Kim, & Zhang, 2023; Han, Lee, & Kim, 2022). Recent sport marketing research further emphasizes that digital transformation is reshaping value co-creation processes between sport brands and consumers, enabling interactive relationships in which users actively participate in creating brand meaning through digital platforms and social media engagement (Stegmann, Nagel, & Ströbel, 2023). Within recreational running communities, online forums, training platforms, and social media groups frequently function as important sources of product information. These digital environments play a central role in shaping consumer perceptions and brand preferences, as runners actively exchange experiences and evaluations through online communities (Thompson & Sato, 2021). Runners often exchange experiences related to footwear comfort, injury prevention, durability, and performance benefits. These interactions help build collective knowledge within running communities and may significantly influence purchasing decisions.

Electronic word-of-mouth (eWOM) is one of the most influential mechanisms by which digital environments affect consumer choice. Running footwear is often considered a high-involvement purchase, as runners associate footwear selection with performance outcomes, comfort, and injury prevention. Consequently, consumers actively seek diagnostic information before making purchasing decisions. Previous research demonstrates that eWOM significantly influences consumer attitudes, trust, and purchase intentions in digital environments (Hennig-Thurau et al., 2004; Cheung & Thadani, 2012). Social influence processes within online sport communities further reinforce these dynamics by enabling runners to exchange recommendations and experiences related to different footwear models and brands (Pizzo et al., 2023).

At the individual level, consumer decisions in sport equipment markets can also be explained using customer-based brand equity frameworks. Brand equity reflects the value associated with brand awareness, perceived quality, and brand loyalty, which together reduce perceived risk and increase consumer confidence during purchasing decisions (Aaker, 1991; Keller, 1993). From a broader consumer behavior perspective, perceived value theory also emphasizes the trade-off between perceived quality, benefits, and sacrifice in consumer decision-making processes (Zeithaml, 1988). In sport equipment markets such as running footwear, these mechanisms influence how consumers interpret product quality, technological innovation, and brand reputation when choosing footwear. In the context of running footwear, well-established brands often serve as signals of technical competence, reliability, and product innovation.

Recreational running has experienced significant global growth over the past decades and has become one of the most popular forms of mass-participation sport. Running events attract millions of participants worldwide and represent an important segment of the broader sport participation landscape. Previous research on running participation identifies multiple motivational drivers among recreational runners, including health improvement, personal challenge, social interaction, and achievement goals (Clough, Shepherd, & Maughan, 1989).

Half-marathon participants in particular often occupy a position between casual recreation and more serious endurance sport involvement. Participation in such events requires a substantial investment of time and effort in training preparation and equipment selection. Research using the Motivations of Marathoners Scale (MOMS) indicates that long-distance runners frequently demonstrate higher levels of commitment to training routines and sport-related consumption activities (Masters, Ogles, & Jolton, 1993). Consequently, runners participating in half-marathon events often show strong engagement with running-related products such as footwear, apparel, wearable devices, and training technologies. Technological innovations in the running equipment industry – including advanced cushioning systems, carbon-plated racing shoes, and lightweight materials – continuously reshape competition among footwear brands and may influence purchasing decisions among recreational runners (Ramsey, Wretenberg, & Felländer-Tsai, 2022).

Participant sport events therefore provide valuable empirical environments for observing sport consumption behavior. Previous studies in sport tourism research indicate that participation in recurring sport events can significantly influence participants' behavioral intentions, destination attachment, and future participation decisions (Kaplanidou & Gibson, 2010). These events attract large numbers of active consumers whose equipment choices may reflect broader trends in the running footwear market. Recent sport management research suggests that participant sport events provide important contexts for examining the interaction between motivations, social influence, and consumption practices among recreational athletes (Baker, Funk, & McDonald, 2023). Qualitative research on endurance sport participants also shows that committed amateur athletes often develop strong identities around their sport participation, which can influence consumption patterns related to sport equipment and performance technologies (Lamont & Kennelly, 2012). Participation decisions in sport events are also shaped by motivational factors and perceived constraints, which may influence both participation frequency and consumption behavior related to sport travel and equipment purchases (Buning & Gibson, 2016). Recurring sport events can also contribute to the development of place attachment and

destination image among participants, further strengthening the relationship between sport participation, travel experiences, and consumer behavior (Kaplanidou, Jordan, Funk, & Ridinger, 2012). Research also suggests that the perceived fit between sport events and their host destinations can influence future behavioral intentions and participation decisions among active sport tourists (Hallmann & Breuer, 2010).

Despite the extensive literature on sport globalization and the digital transformation of sport consumption, relatively little empirical research has examined how global footwear market dynamics are reflected in local recreational running communities. Most existing studies focus either on global market analyses or survey-based consumer research. Direct observation of equipment choices among recreational runners participating in running events remains relatively rare.

Furthermore, the interaction between global brand dominance, digital information flows, and local market constraints has not been sufficiently explored in smaller regional markets. Running events, particularly mass-participation races such as half-marathons, provide a valuable empirical setting for examining these dynamics because they gather large numbers of recreational athletes whose equipment choices may reflect broader consumer trends within the running community.

Therefore, the aim of this study is to examine whether global trends in the running footwear industry are reflected in the local consumption patterns of recreational runners and to analyze the dynamics of brand distribution over time. By combining longitudinal observational data with statistical analysis of brand distribution patterns, this study contributes to sport management research by providing empirical evidence on how global sport industry structures are reflected in local recreational sport consumption environments.

Material & methods

To test the proposed hypotheses, an observational dataset of running footwear brands used by participants in a recurring road race event was collected and analyzed using descriptive statistics, regression trend analysis, Pearson correlation coefficients, and hierarchical cluster analysis. Statistical analyses were performed using Microsoft Excel and IBM SPSS Statistics. The significance level was set at $p < .05$ for all statistical tests.

Based on the theoretical framework of sport globalization, digital diffusion, and consumer brand behavior, the following hypotheses were formulated:

H1: Global sportswear brands (e.g., Nike and Adidas) dominate running footwear choices among recreational runners participating in local running events.

H2: The distribution of running footwear brands changes over time, reflecting the diffusion of emerging brands within the recreational running market.

H3: Competitive dynamics exist between dominant brands, resulting in negative correlations in their market shares over time.

Data were collected by observing the footwear brands worn by participants in the 5 km race held as part of the Osijek half-marathon event in Croatia. The race is organized annually and serves as a pre-event for the main half-marathon race. Footwear brands were recorded for each registered runner crossing the finish line. The observation period covered eight consecutive race editions between 2018 and 2025. The total sample included 2,284 runners, representing an average of approximately 286 participants per event. The recorded brands included Nike, Adidas, Asics, Mizuno, Saucony, Brooks, and Hoka. All other brands were categorized as "Other".

The collected data were aggregated by year and analyzed using several statistical techniques. Descriptive statistics were used to calculate the average share and standard deviation for each brand across the observed years. Linear regression analysis was applied to examine temporal trends in brand shares. Pearson correlation coefficients were calculated to explore relationships between changes in brand shares. In addition, hierarchical cluster analysis using Ward's method was conducted to identify groups of brands with similar temporal patterns.

Results

The analysis examined the distribution and temporal dynamics of running footwear brands among participants in the Osijek Ferivi Half Marathon event from 2018 to 2025. Descriptive statistics, regression trend analysis, Pearson correlation analysis, and hierarchical cluster analysis were used to explore patterns in brand shares over time.

Table 1 shows the distribution of running footwear brands among participants across the eight observed years. The table includes both the percentage shares and the absolute number of runners wearing each brand. Nike and Adidas are the two most frequently observed brands across the entire dataset, followed by Asics, Saucony, Brooks, and Mizuno. Smaller shares are recorded for Hoka and other brands.

Table 1: Share of running footwear brands among participants in the Osijek Ferivi Half Marathon across years

YEAR	NIKE	ADIDAS	ASICS	MIZUNO	SAUCONY	BROOKS	HOKA	OTHER	TOTAL
2025	30%	36%	15%	3%	6%	5%	5%	1%	100%
2024	43%	29%	18%	4%	3%	3%	1%	13%	100%
2023	33%	33%	13%	2%	7%	3%	1%	9%	100%
2022	32%	24%	10%	4%	8%	3%	4%	15%	100%
2021	40%	26%	5%	5%	6%	2%	1%	17%	100%
2020	33%	33%	5%	6%	4%	2%	0%	18%	100%
2019	48%	35%	7%	3%	4%	1%	1%	1%	100%
2018	46%	27%	12%	2%	1%	2%	0%	10%	100%
AVERAGE	38%	30%	10%	3%	5%	3%	2%	11%	100%

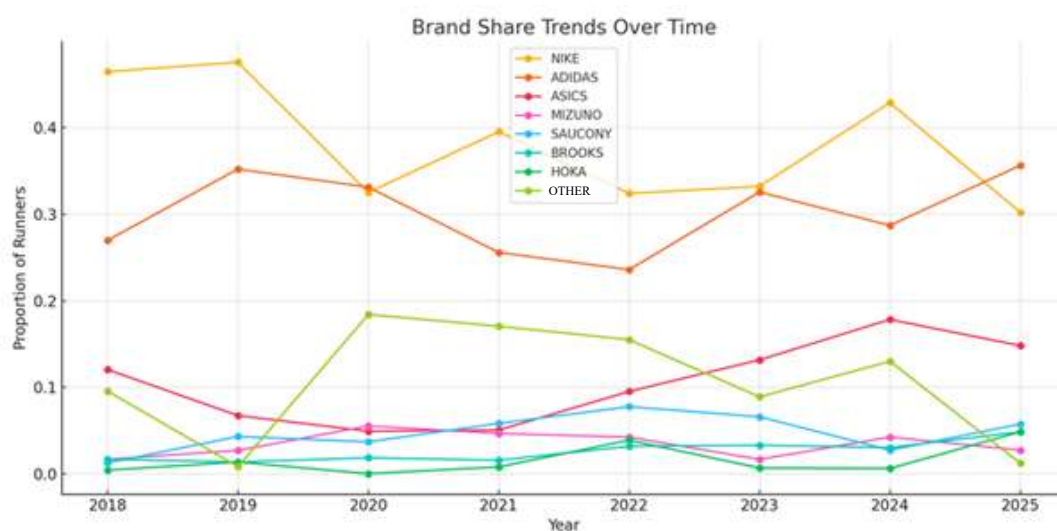
Number of runners

YEAR	NIKE	ADIDAS	ASICS	MIZUNO	SAUCONY	BROOKS	HOKA	OTHER	TOTAL
2025	100	118	49	9	19	16	16	4	331
2024	142	95	59	14	9	10	2	43	331
2023	101	99	40	5	20	10	2	27	304
2022	92	67	27	12	22	9	11	44	284
2021	102	66	13	12	15	4	2	44	258
2020	53	54	8	9	6	3	0	30	163
2019	177	131	25	10	16	5	5	3	372
2018	112	65	29	4	3	4	1	23	241
AVERAGE	110	87	31	9	14	8	5	27	286

Source: Authors' research

Figure 1 illustrates the changes in brand shares across the eight-year observation period. The trend lines show fluctuations in the relative presence of different brands among race participants.

Figure 1: Trend lines of brand shares over time



Source: Authors' research

To contextualize the observed brand distribution among runners, estimated global market share ranges of major running footwear brands were compiled from publicly available industry reports and market analyses. Figure 2 shows the estimated global market shares of major running footwear brands based on the compiled market reports.

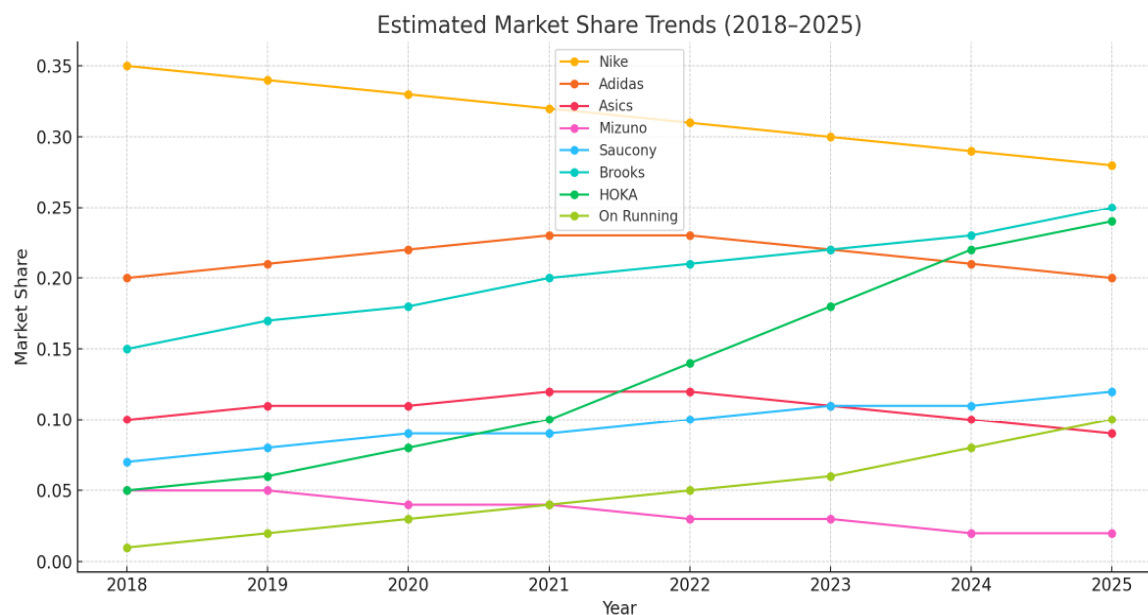
Table 2: Estimated market share ranges of major running footwear brands and data sources

Brand	Market share (%)	Source
Nike	25% – 35%	Custom Market Insights , Maximize Market Research
Brooks	22% – 25%	RunRepeat
HOKA	10% – 24%	Custom Market Insights
Adidas	5% – 25%	Maximize Market Research
Saucony	7% – 12.6%	Custom Market Insights , Runner's World
Asics	5% – 12.5%	Custom Market Insights , Runner's World
New Balance	7.4% – 10%	Runner's World
On Running	3.7% – 10%	Runner's World
Mizuno	1.7% – <5%	Runner's World , Custom Market Insights

Source: Authors' research

As shown in Table 2, Nike holds the largest share of the global running footwear market according to most industry estimates. Other brands such as Brooks, Hoka, and Saucony also occupy significant positions within the performance running segment. Compared with these global estimates, the distribution observed among participants in the Osijek running event demonstrates stronger dominance of Nike and Adidas, while several globally growing brands appear less represented in the local sample. These differences suggest that local market conditions and product availability may influence the adoption of global footwear trends.

Figure 2: Global market share of major running footwear brands



Source: Authors' research

Figure 3 compares the estimated global market shares with the distribution of brands observed among participants in the analyzed running event.

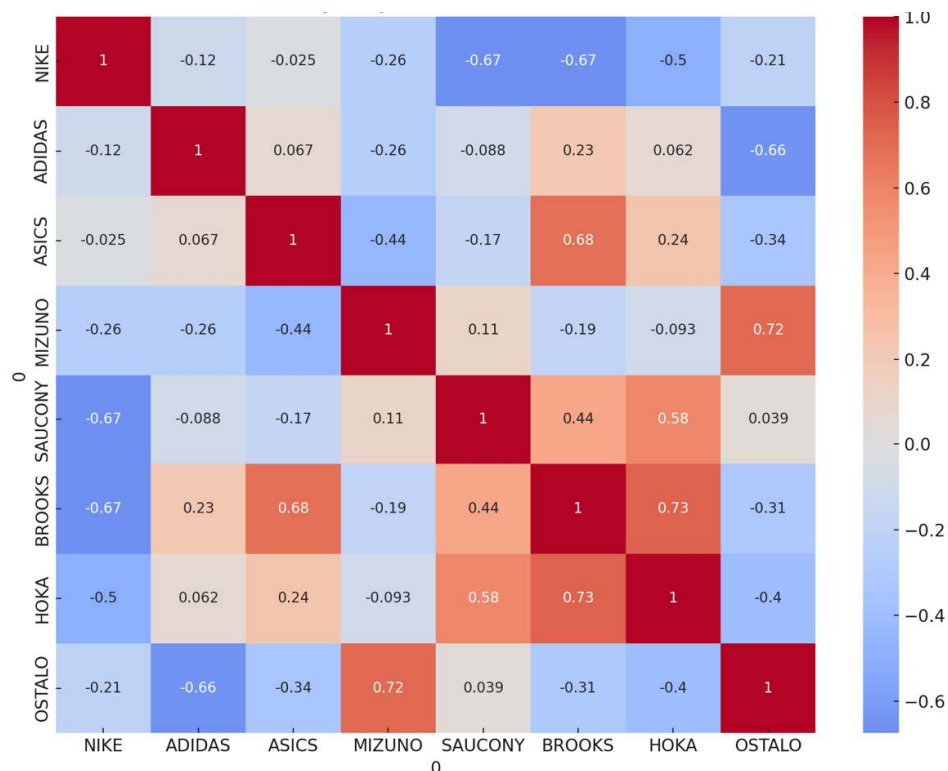
Figure 3: Comparison of global market share and brand distribution in the race sample



Source: Authors' research

Pearson correlation coefficients were calculated to examine relationships between changes in brand shares across the observed years. The correlation matrix is presented in Figure 4.

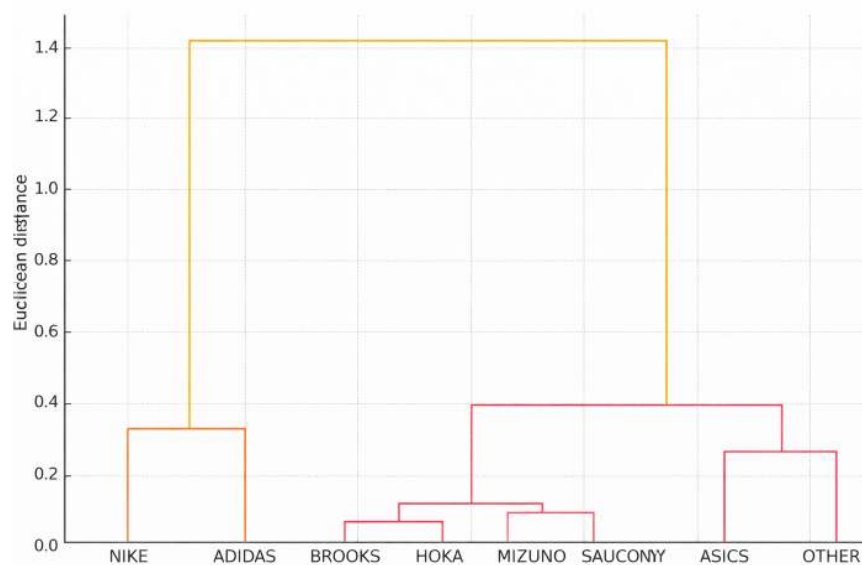
Figure 4: Pearson correlation matrix of brand shares



Source: Authors' research

To identify groups of brands with similar temporal patterns, a hierarchical cluster analysis using Ward's method was conducted. The results are presented in Figure 5.

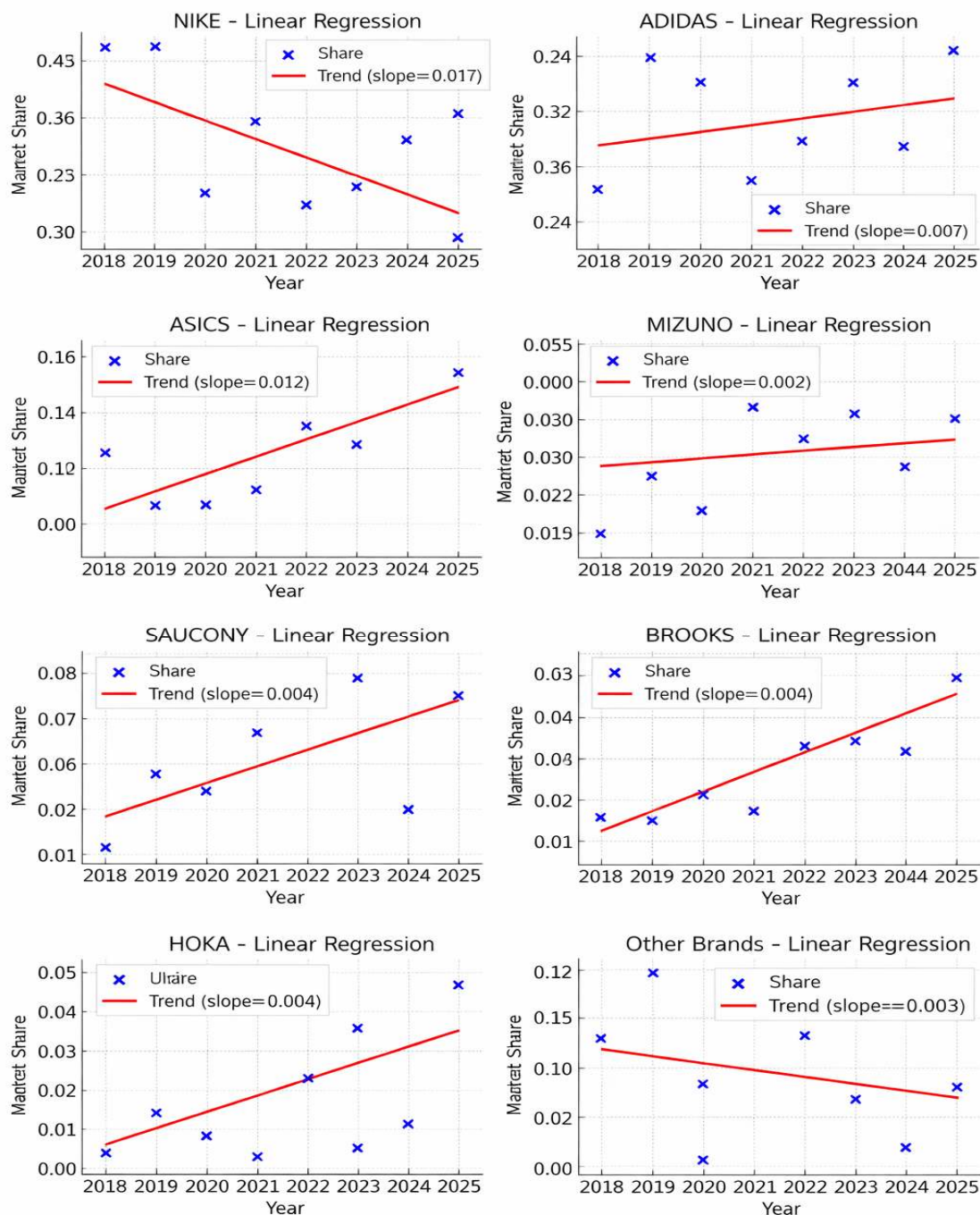
Figure 5: Hierarchical cluster analysis of running footwear brands



Source: Authors' research

Linear regression analysis was performed to examine temporal trends in brand shares across the eight-year observation period. The regression results are presented in Figure 6.

Figure 6: Linear regression analysis of brand share trends



Source: Authors' research

Discussion

The purpose of this study was to examine whether global trends in the running footwear industry are reflected in the local consumption patterns of recreational runners participating in a recurring road race event. The descriptive results presented in Table 1 indicate a clear dominance of Nike and Adidas throughout the observed eight-year period. Together, these two brands account for the majority of footwear choices among race participants, representing approximately two thirds of all observed footwear selections. Figure 1 illustrates moderate fluctuations in brand shares over time, indicating that although dominant brands maintain strong positions, the distribution of footwear brands among runners gradually varies across years.

These findings align with broader structural characteristics of the global sportswear industry. From the perspective of globalization theory, the dominance of Nike and Adidas reflects the concentration of market power among a small number of multinational sportswear corporations operating within transnational flows of capital, technology, and symbolic value (Andrews & Ritzer, 2007; Giulianotti & Robertson, 2007). These companies benefit from large-scale marketing infrastructures, technological innovation capabilities, and strong brand equity, which reinforce their visibility and credibility among both professional athletes and recreational sport participants. As suggested by brand equity theory, well-established brands reduce perceived uncertainty in consumer decision-making and function as signals of product quality and reliability (Aaker, 1991; Keller, 1993). At the same time, the descriptive results also indicate gradual diversification of brand presence during the analyzed period. Brands such as Saucony, Brooks, and Hoka show moderate growth in representation among runners. Although their shares remain smaller compared to the dominant brands, the observed trends suggest that specialized performance-oriented brands are gradually gaining visibility within recreational running communities. This pattern reflects the innovation-driven nature of the running footwear industry, where technological developments continuously reshape competition. Advances such as carbon-plated racing shoes, advanced cushioning systems, and lightweight materials have accelerated product differentiation and contributed to the diffusion of new brands within recreational markets (Ramsey, Wretenberg, & Felländer-Tsai, 2022).

The comparison between local observations and global market estimates provides further insights into these dynamics. Table 2 and Figure 2 present estimated global market shares of major running footwear brands based on industry reports and market analyses, while Figure 3 compares these global estimates with the brand distribution observed in the analyzed race event. The comparison suggests partial alignment between global market structures and local consumption patterns. While Nike's global dominance is clearly reflected in the observed sample, certain brands that have experienced strong growth in global performance running markets – particularly Hoka and Brooks – appear less represented in the local dataset. This discrepancy suggests that the diffusion of emerging brands may occur at different speeds across regional markets and may be influenced by local factors such as retail availability, pricing structures, and consumer familiarity with specific brands.

Additional insights into competitive dynamics among brands are provided by the correlation analysis presented in Figure 4. The Pearson correlation matrix indicates several negative relationships between the shares of dominant brands, suggesting competitive substitution effects within the running footwear market. In practical terms, increases in the share of one dominant brand may coincide with decreases in the share of another, reflecting dynamic competition among major sportswear companies within the same consumer segment.

The hierarchical cluster analysis presented in Figure 5 further illustrates similarities in temporal patterns among certain brands. Brands with comparable growth trajectories are grouped in the same clusters, indicating that some emerging performance-oriented brands follow similar diffusion dynamics within the recreational running market.

Regression trend analysis provides additional evidence of gradual shifts in brand shares over time. The regression results presented in Figure 6 indicate that while dominant brands remain highly represented, several smaller brands display positive trend coefficients, suggesting increasing adoption among runners during the observed period.

These findings can also be interpreted in relation to the growing role of digital communication environments in shaping consumer awareness. These findings are particularly relevant for sport marketing research because they illustrate how brand equity, digital communication, and community influence interact within recreational sport markets. Social media platforms, online running communities, and digital training applications enable runners to exchange experiences, reviews, and product recommendations. Previous research shows that user-generated content and sport social media interactions play an important role in shaping brand perceptions and consumer engagement within sport markets (Filo, Lock, & Karg, 2015). These environments facilitate processes of value co-creation in which consumers actively participate in shaping brand meanings through interaction and content sharing (Woratschek, Horbel, & Popp, 2022).

Electronic word-of-mouth and influencer marketing further strengthen these mechanisms. Influencers and experienced runners often function as opinion leaders whose recommendations influence product evaluations among followers. Research indicates that perceived credibility and product-influencer fit significantly affect consumer attitudes toward brands and purchasing intentions (De Veirman, Cauberghe, & Hudders, 2017; Belanche, Casaló, Flavián, & Ibáñez-Sánchez, 2021). In the running segment, social media interactions between brands and consumers contribute to the construction of authentic brand narratives within running communities (Geurin & Burch, 2017).

Another important aspect relates to the omnichannel nature of contemporary consumer journeys. Runners frequently combine multiple information sources during the decision-making process, including online reviews, social media exposure, and physical product testing in retail environments. Customer journey research shows that consumers move between channels during the search and purchase process, integrating digital and physical experiences (Lemon & Verhoef, 2016; Verhoef, Kannan, & Inman, 2015). In smaller regional markets, this process may produce differences between globally diffused brand preferences and locally realized purchasing choices. This pattern can also be interpreted through the concept of globalization, which explains how global trends are adapted within specific local market contexts (Robertson, 1995).

The characteristics of the observed sample can also be interpreted in relation to the specific nature of recreational running communities. Previous research identifies multiple motivational drivers among recreational runners, including health improvement, personal challenge, social interaction, and achievement goals (Clough, Shepherd, & Maughan, 1989). Participation in half-marathon events often represents a form of serious leisure in which individuals invest significant time and resources into training and equipment (Masters, Ogles, & Jolton, 1993). Consequently, runners participating in such events may demonstrate higher involvement in product selection and greater sensitivity to performance-related equipment attributes.

From a sport management perspective, participant sport events represent valuable environments for observing sport-related consumption behavior. Running events bring together large numbers of athletes whose equipment choices reflect broader consumer behavior trends within the running community. Such events therefore provide important empirical contexts for understanding how global industry structures interact with local consumption patterns.

Overall, the findings of this study suggest that recreational running communities operate within a broader global sports marketplace but adapt global trends through local market conditions, digital information flows, and social influences within running communities. Future research could expand this approach by incorporating survey-based data on runners' motivations, purchasing criteria, and information sources. One limitation of the study is that the analysis focuses on a single running event and does not include direct survey data on runners' motivations or purchasing criteria.

Conclusions

This study examined the distribution and temporal dynamics of running footwear brands among recreational runners participating in a local running event over an eight-year period. The findings indicate that the local running community reflects broader structural characteristics of the global sports footwear market, particularly the strong dominance of multinational sports brands.

Nike and Adidas consistently maintained the largest shares among participants, confirming the continued influence of globally established brands within recreational sport markets. At the same time, the analysis revealed gradual diversification of brand presence over time, with performance-oriented brands such as Saucony, Brooks, and Hoka gaining visibility among runners. These trends suggest that innovation-driven segments of the running footwear industry are gradually diffusing into local recreational running communities.

The results also highlight the role of competitive dynamics among dominant brands, as indicated by negative correlations between the market shares of leading brands. This pattern reflects substitution effects in consumer choice within the running footwear market. Furthermore, the observed differences between global market estimates and the local distribution of brands suggest that local market conditions – such as product availability, pricing, and retail networks – continue to shape consumption outcomes despite increasing globalization and digital information flows.

From a sport management perspective, the study demonstrates that participant sport events represent valuable empirical environments for observing sport-related consumption patterns. Recreational running events gather large numbers of athletes whose equipment choices reflect broader consumer behavior trends in the running community. Future research could expand this approach by integrating survey-based data on runners' motivations, purchasing criteria, and information sources, thereby providing deeper insights into the mechanisms through which global industry trends translate into local consumer behavior. These findings may also provide practical insights for sport event organizers, sport retailers, and sport marketers by highlighting how global brand dynamics and digital information flows influence equipment choices among recreational runners.

Declaration of generative AI and AI-assisted technologies in the writing process

During the preparation of this paper the authors used ChatGPT (OpenAI) in order to improve language clarity and academic writing style. After using this tool, the authors reviewed and edited the content as needed and take full responsibility for the content of the publication.

Conflicts of interest The authors declare no conflict of interest.

Limitations

This study has several limitations that should be considered when interpreting the findings. First, the analysis is based on data collected from a single running event, which may limit the generalizability of the results to other contexts or geographic regions. Second, the study relies on observational data and does not include direct information on participants' motivations, purchasing criteria, or socioeconomic characteristics. Third, the analysis focuses on brand-level identification without distinguishing between specific footwear models, which may also influence consumer choice. Future research could address these limitations by incorporating survey-based data and expanding the analysis to multiple events and regions.

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