

**AColorBright** *Insights*

# Decoding next-gen Running Brands



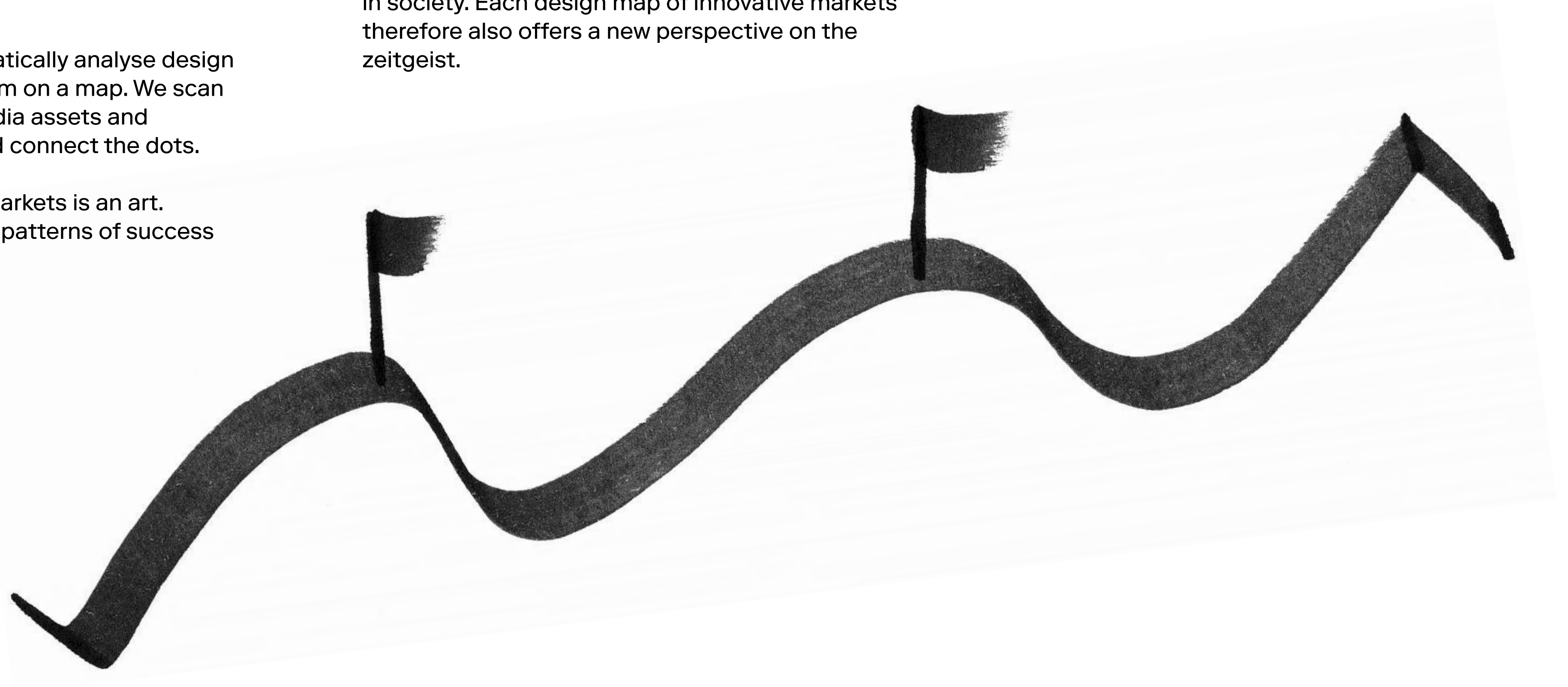
# All maps are wrong; some are useful

Brand maps are an long established tool for marketeers to analyse competition. Like every single map in the world, they're wrong by definition. But they're still helpful. They reduce complexity and help us see bigger patterns.

For our design maps, we systematically analyse design elements in markets and put them on a map. We scan hundreds of websites, social media assets and products to identify patterns and connect the dots.

Positioning brands in crowded markets is an art. Zooming out helps us to identify patterns of success and potential niches.

But each map also contains some insights into other markets and society at large. Successful brands reflect people's needs. The systematic analysis of brands shows us what moves consumers and what resonates in society. Each design map of innovative markets therefore also offers a new perspective on the zeitgeist.



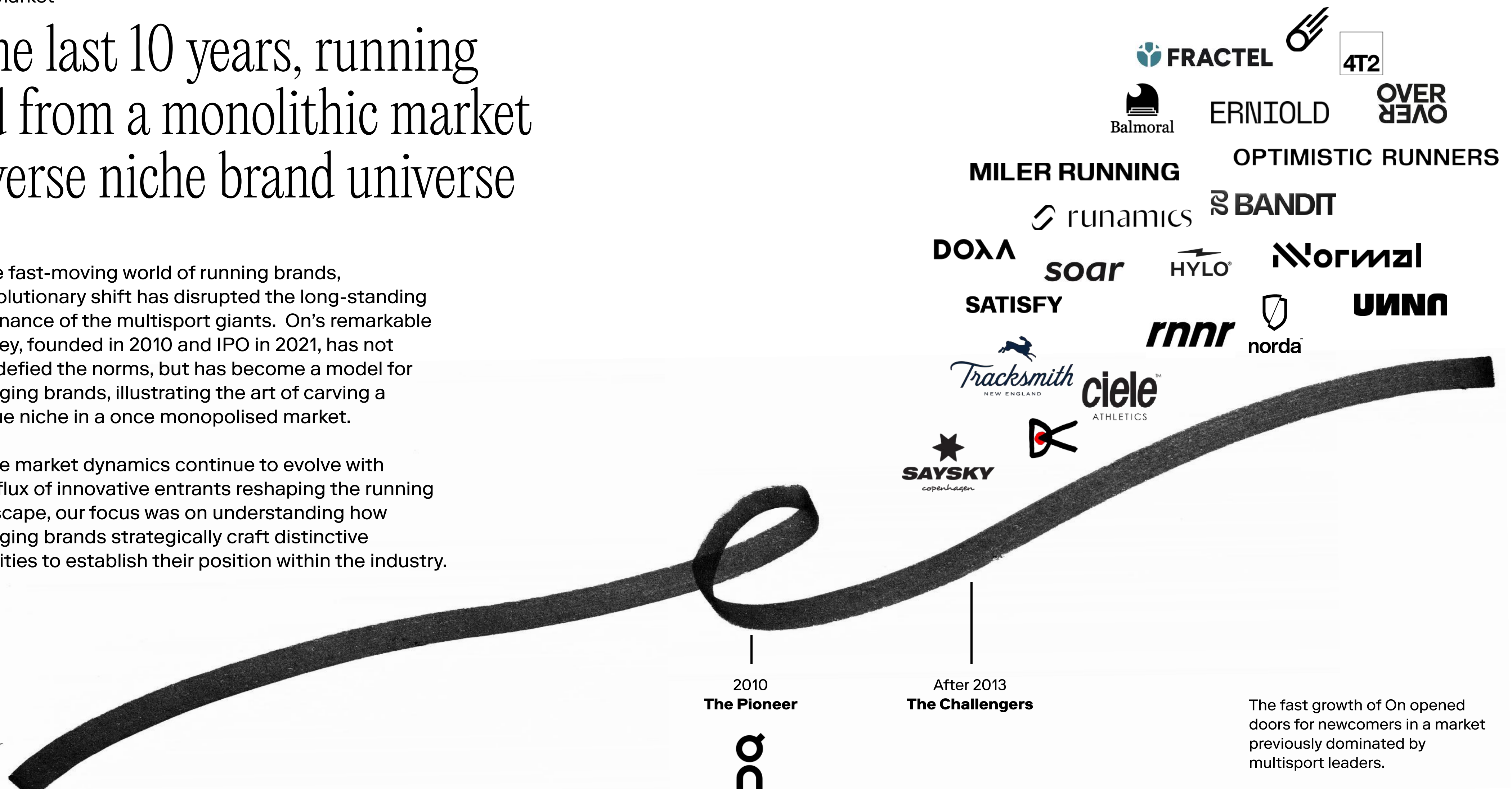
The Market

# Over the last 10 years, running evolved from a monolithic market to a diverse niche brand universe

In the fast-moving world of running brands, a revolutionary shift has disrupted the long-standing dominance of the multisport giants. On's remarkable journey, founded in 2010 and IPO in 2021, has not only defied the norms, but has become a model for emerging brands, illustrating the art of carving a unique niche in a once monopolised market.

As the market dynamics continue to evolve with an influx of innovative entrants reshaping the running landscape, our focus was on understanding how emerging brands strategically craft distinctive identities to establish their position within the industry.

**The Leaders**



2010  
**The Pioneer**


























After 2013  
**The Challengers**



The fast growth of On opened doors for newcomers in a market previously dominated by multisport leaders.

The Brands

# We decoded design patterns of 20+ next generation running brands

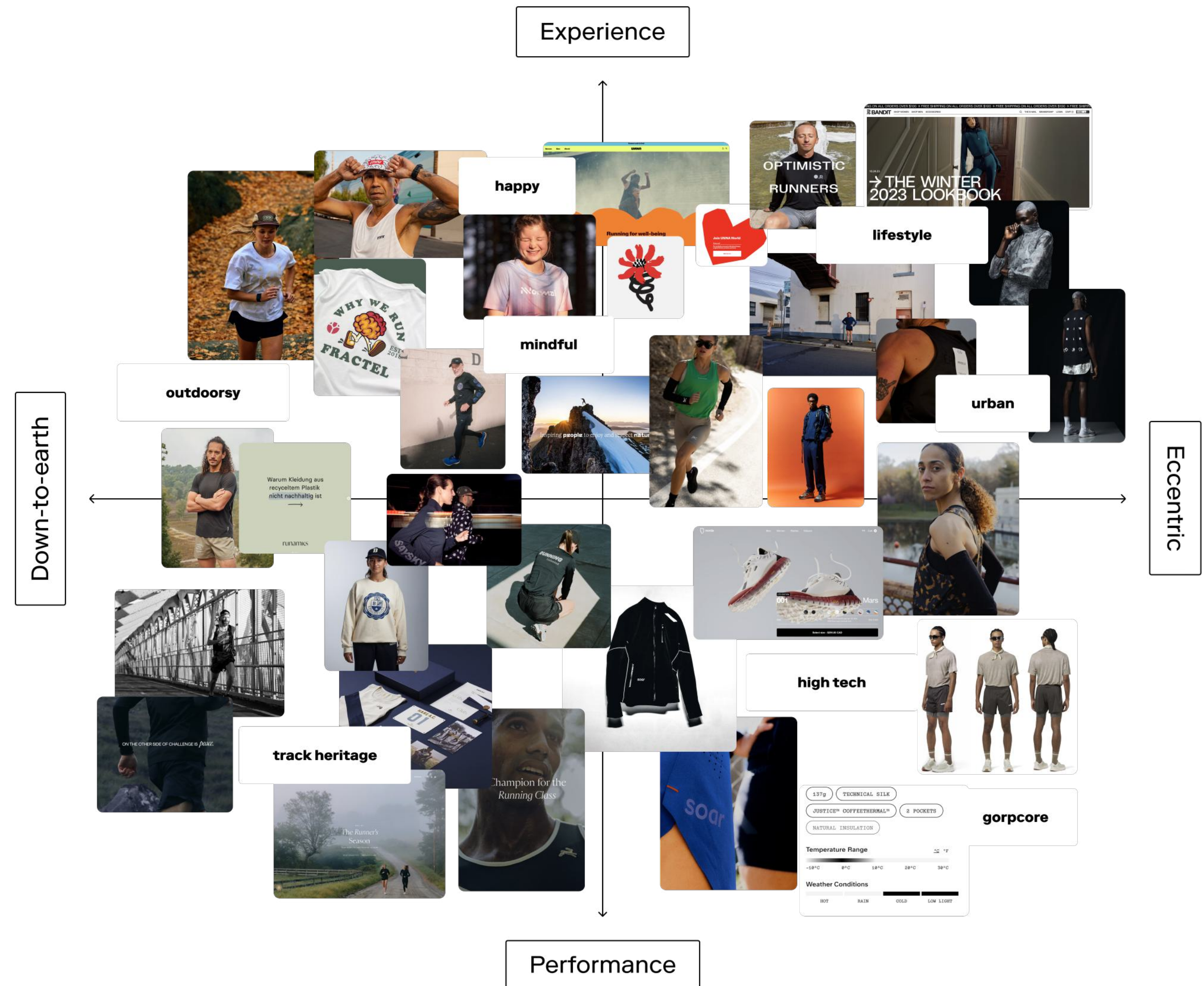
Logo	Brand name	Founding year	Headquarters	Logo	Brand name	Founding year	Headquarters
	<u>Saysky</u>	2013	Denmark		<u>Runamics</u>	2019	Germany
	<u>District Vision</u>	2014	United States		<u>Bandit</u>	2020	United States
	<u>Tracksmith</u>	2014	United States		<u>Erniold</u>	2020	Australia
	<u>Ciele Athletics</u>	2015	Canada		<u>Hylo Athletics</u>	2020	United Kingdom
	<u>Satisfy</u>	2015	France		<u>Norda</u>	2020	Canada
	<u>Soar</u>	2015	United Kingdom		<u>4t2</u>	2021	Netherland
	<u>Doxa</u>	2016	Denmark		<u>Near earth</u>	2021	Germany
	<u>Balmoral</u>	2018	Canada		<u>Over Over</u>	2021	United Kingdom
	<u>Fractel</u>	2018	Australia		<u>Unna</u>	2021	Sweden
	<u>Miler Running</u>	2019	United States		<u>NNormal</u>	2022	Spain
	<u>rnr</u>	2019	United States		<u>Optimistic Runners</u>	2023	Germany
	<u>Circle Sportswear</u>	2019	France				

# The visual landscape of running brands

At the heart of the dynamic world of running brands is a fundamental question: What drives your run? Is it a journey of self-discovery or a quest for a personal best? As we explore this question, let us consider how these motivations are intertwined.

Recently there has been a noticeable shift in the market. Many brands are embracing uniqueness and blending into the gorpcore dominated streetwear. However, in the ever-changing fashion scene, every major trend paves the way for its opposite. Enter the anti-trend—a movement towards down-to-earth, mindful running experiences that turns away from flashy embellishments. It's all about the real essence of running, without the unnecessary frills.

Using the visual landscape, we explore how each brand carves out its own space, shaping the visual story of running in today's world.

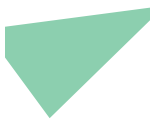


# Brand map



## Running Realkeepers

Committed to authenticity and a genuine running experience, Running Realkeepers look for brands that honour the heritage of running while embracing modern community values.



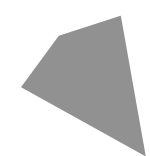
## Fashion Pacers

Fashion Pacers aspire to make a bold statement with their running attire, seeking a sense of community rooted in shared stylistic preferences over mere athletic endeavours.



## Mindful Joggers

Mindful joggers value the holistic benefits of running, prioritise both physical health and mental wellbeing, and approach running with a joyful spirit.



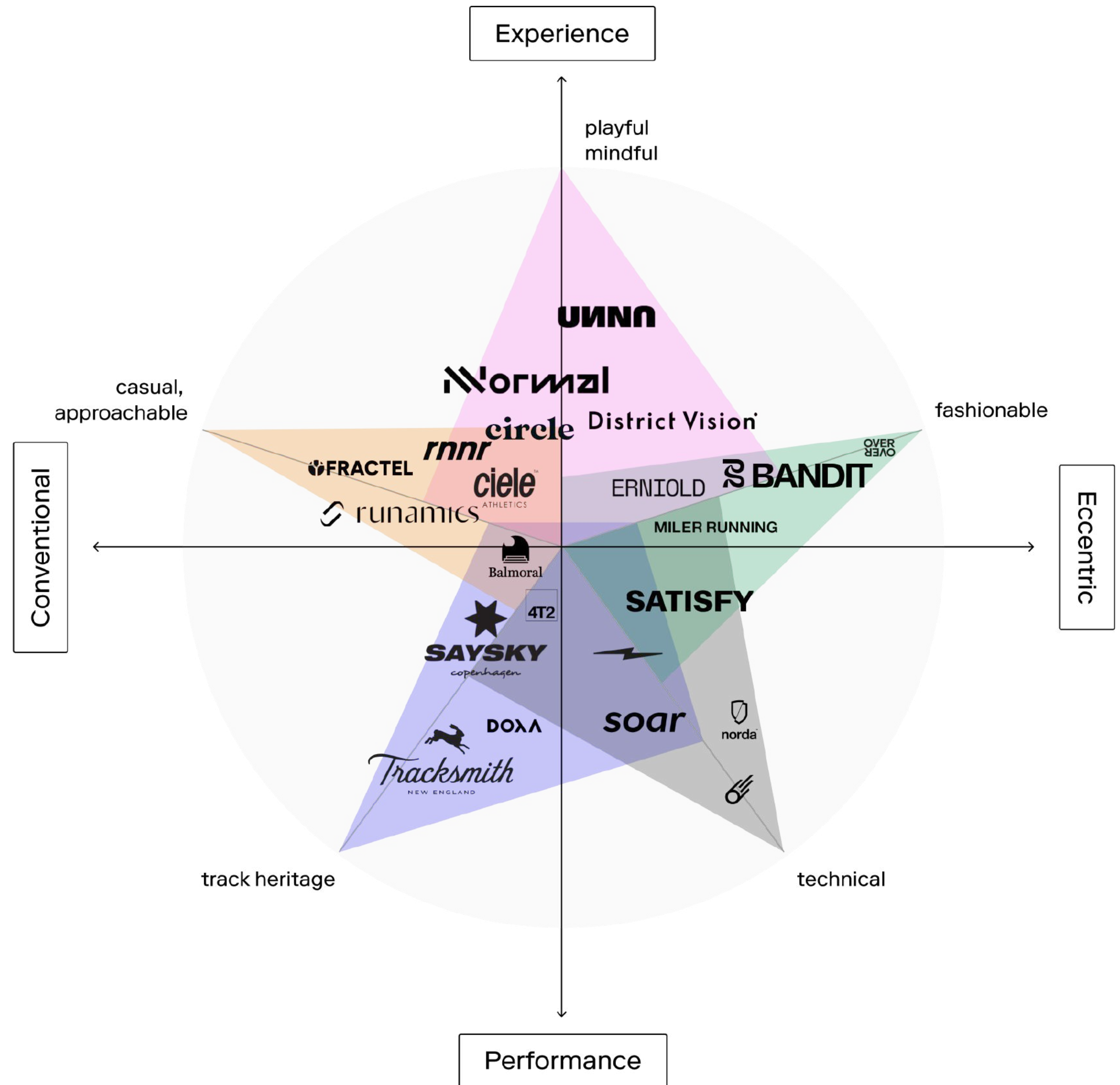
## Precision Performers

Precision Performers, avid seekers of sophistication, are drawn to innovative products with advanced performance features that emphasise comfort and a distraction-free running experience.



## Runners Next Door

For Next Door Runners, simplicity and comfort are essential in their quest for uncomplicated, motivational running apparel.

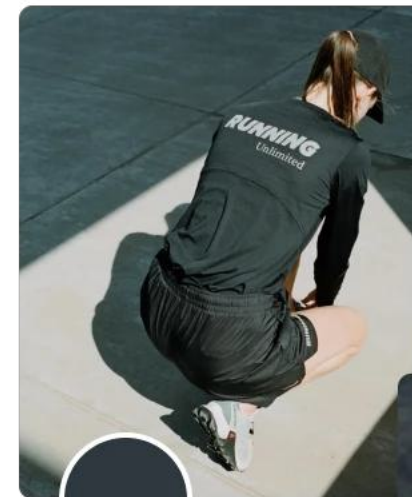


# 1 — Running Realkeepers



*Race Day Is Sacred*

We believe in competition and the meritocracy of racing. Not because winning and losing are particularly important, but because competition sends us on an innately human journey. The profound physical and mental demands of training and racing lead to a richer and more sensitive and thrilling life. They make us better human beings.



Champion for the Running Class



## Colours

Reflecting a commitment to tradition, the colour palette of these brands features navy blue and classic colours in subdued tones.

## Type

Typography choices echo heritage and formality, utilising humanistic fonts, high-contrast serifs, and scripts—a nod to clubs and traditional societies. Typesetting is clear, non-experimental, and efficient.

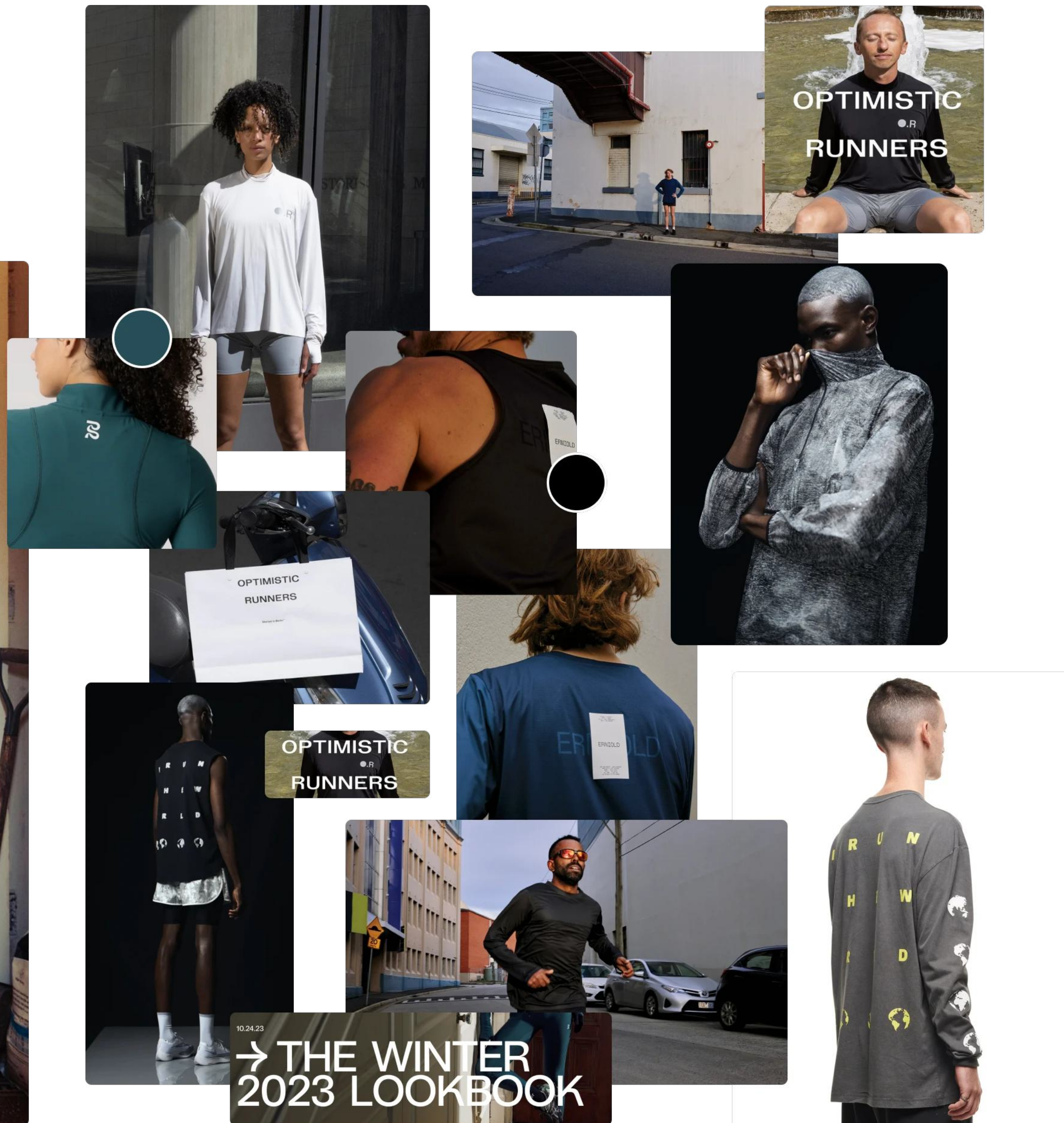
## Photography

Picturesque landscapes and trails dominate the photography, evoking a sense of pure connection with the environment during a run. Emphasis is placed on runners together, underscoring the communal nature of the sport that resonates with Running Realkeepers.

## Visuals

With a feel reminiscent of the close bonds formed during the college run, brands are using emblems and coloured bands to bring back the varsity style.

# 2 — Fashion Pacers



## Colours

In the realm of fashion-forward running brands, dark tones and monochromatic, high-contrast schemes dominate the colour palette.

## Type

Typeface choices, such as (neo-)grotesque with stylistic twists, enhance the contrast, with many brands adopting a single typeface for a cohesive branding approach.

## Photography

Photography for fashion-forward brands is heavily influenced by fashion, featuring models in studio or urban settings before and after their run. Rather than capturing the dynamic action of running, this approach reinforces the narrative that the brand's running gear transcends functionality to become a unique fashion statement.

## Visuals

Distinctive and iconic branding elements, seamlessly woven into stylish garments, contribute to the overall identity and emphasise the fashion-forward image of these brands.



# 3— Precision Performers



**Satisfy®**  
Since launching in 2015, Satisfy® develops technical equipment that reduce distractions to help runners unlock the High.

**SOAR CUSTOM PROGRAMME**

Designed to remove distractions in the pursuit of The High.

Engineered in Germany and manufactured by some of Europe's best garment makers.

Drawcord waist system

Adjust the fit, and regulate temperature

## Colours

The sleek and high-contrast colour palette of performance brands reflects their technical focus, minimising tonality for a modern, futuristic and tech-savvy aesthetic.

## Type

Typography takes a meticulous approach, with (neo)grotesque sans serifs and monospace fonts dominating, reinforcing the technical edge. Satisfy labels, using a monospace font, contribute to the tech-inspired aesthetic, evoking an industrial and technical environment.

## Photography

The photography captures the meticulous precision of these brands, presenting intricate shots of products and their technical features. With an artistic approach that puts the product first, the visual language is consistently maintained, reinforcing the brand's commitment to self-optimisation, amplification and focus.

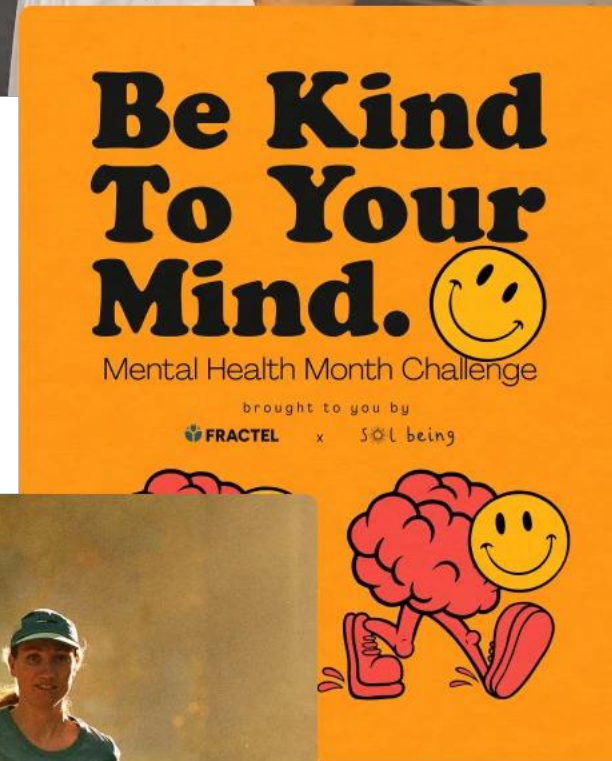
## Visuals

A nod to technology is seen in the consistent use of numbers, dates and precise geometric elements such as grids and lines. Brands such as Norda use grids to give a technological feel to background elements in shoe photography. The overall visual aesthetic remains highly functional and minimally decorative, embodying the Precision Performers' commitment to technical excellence.

# 4 — Runners Next Door



Warum Kleidung aus recyceltem Plastik nicht nachhaltig ist →



Warum Kleidung aus recyceltem Plastik nicht nachhaltig ist →  
runamics



## Colours

The colour palette is organic and nature-inspired, enveloping a space that is soft, calm and gentle, characterised by warm and earthy tones.

## Type

The typography follows a friendly and dynamic approach, often with a vintage charm. Serifs, script, hand lettering and display fonts feature prominently, serving not only functional but also decorative and illustrative purposes. These brands embrace delightful variety, often incorporating multiple and evolving typefaces.

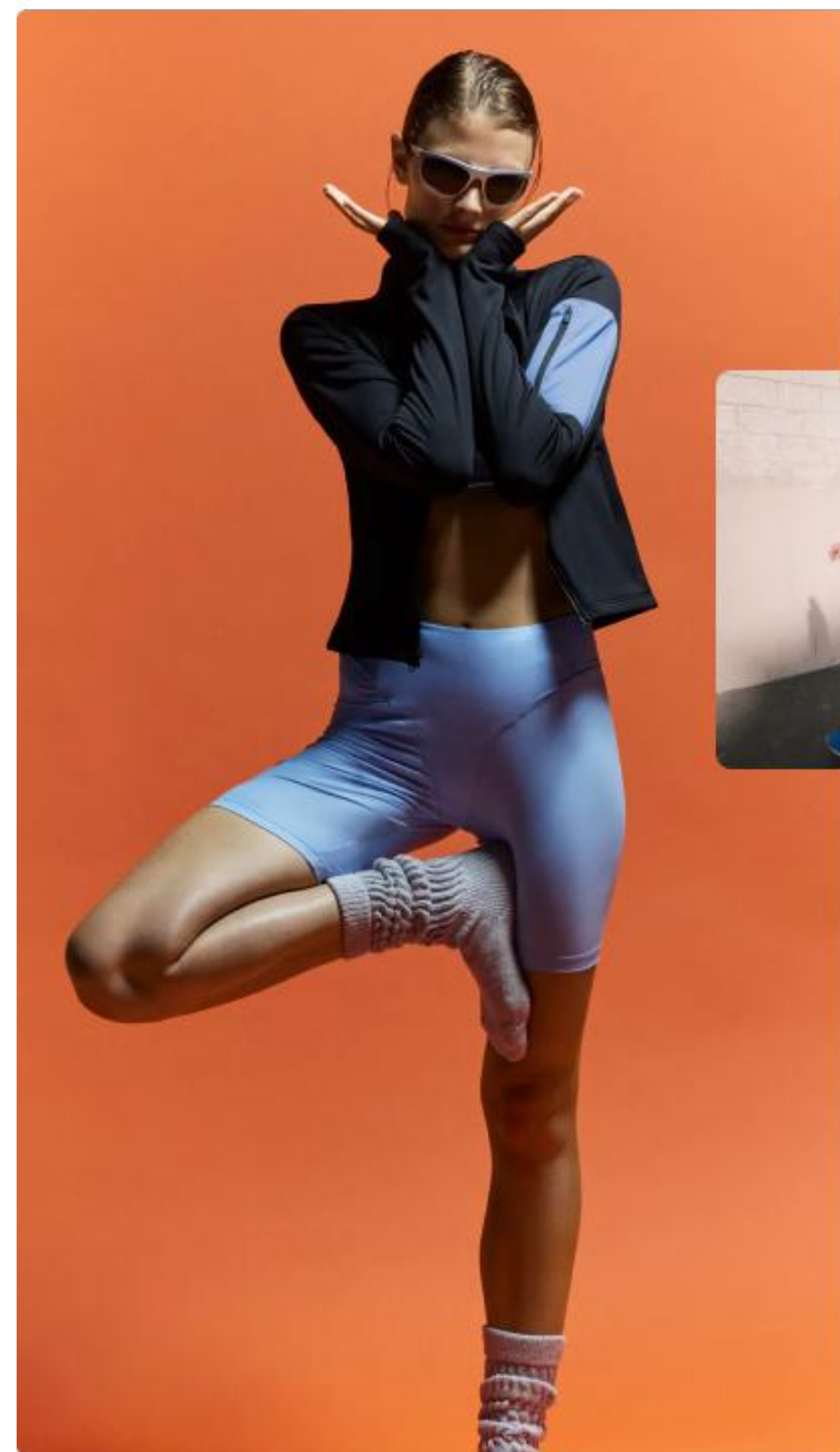
## Photography

Photography captures runners in natural or familiar urban settings, connecting with the routine and accessible aspects of running. Brands use a flexible visual language and imagery that defies strict guidelines, effectively conveying an approachable and welcoming atmosphere.

## Visuals

Visual elements, often used as prints on T-shirts or in social media, include quotes in decorative fonts, comic-style imagery and analogue techniques such as printing, adding a human and relatable touch to the overall aesthetic.

# 5— Mindful Joggers



## Colours

The colour palette reflects the emotional spectrum, which can lean towards either a calming or uplifting direction. Joyful, mindful running brands opt for vibrant hues and bold colour combinations, using solid and primary colours to evoke vitality and positivity. Whereas those seeking a more serene and introspective vibe incorporate gradients and natural, softer tones, reminiscent of the muted palette seen in brands such as District Vision.

## Type

Playful brands use bold typography and display decorative fonts, with some, such as Nnormal, even venturing into experimental font combinations. For a more serene approach, brands combine display and decorative fonts with reliable all-rounders, resulting in a calm and minimalist typeface.

## Photography

Photography captures genuine moments of joy and authentic expression, with snapshots taken in spontaneous rather than staged environments. The editorial style is candid, with spontaneous and occasionally quirky subjects. This approach is consistent with the narrative, emphasising the positive emotional impact of running and shifting the focus from appearance to feeling, grounding the experience and making it more relatable.

## Visuals

Elements include the use of large blocks of colour and hand-drawn illustrations, adding a personal touch to the overall aesthetic.

# Stuff that we expect to see more of in the next years

## Niche-niche gadgets

You can't enter the market with branding alone. Product innovation is key to earning the trust of early adopters. But finding space for product innovation in running is hard. Good shoes are extremely expensive to make, and hats are everywhere. But what about smaller gadgets? Near Earth, for example, promises nothing less than the finest running socks.

## Celebrity-founded brands

The big brands, obviously, use world record holders and professional runners as testimonials. But nothing gives a running brand more credibility than being founded by runners. From brands founded by former runners, like 4t2, to major collaborations between brands and runners, like Nnormal, we think there's more to come.

## As diverse as runners

Put on your shoes and go for a run. Running is the most inclusive sport there is. Yet most brands don't show a diverse image of runners at all, but stereotypical body types. We believe there is room in the market for more inclusive and diverse brands.

## Beyond personal best

Most running brands are very performance-oriented and dead serious. But running is more than just chasing the next personal best. We think there is room for brands that celebrate the fun and mindful experience of running. Unna and District Vision show how it can be done.



# Questions and opinions beyond the data

IS THERE A BRAND FOR PEOPLE WHO DON'T ALREADY (OR WILL NEVER) HAVE THE STEREOTYPICAL BODY OF A RUNNER?

Would you keep the Satisfy's label or rip it off?

WHO'S BUYING THIS STUFF?  
I'M STILL RUNNING IN MY (GIRLFRIEND'S) NIKE LEGGINGS.

Who's the new running star?

FASHION FORWARD BRANDS ARE OUT. MINDFUL BRANDS ARE IN. TIME TO GET A TAROT ON YOUR MOOD-BOARD.

Has someone done running underwear yet?

THE ONLY TIME I SEE PEOPLE WEARING ON IS IN AIRPORT LOUNGES.

Some running brands are getting really big ... how can their website be so bad?

ARE YOU EVEN A CLUB MEMBER?

IS GEN Z INTO RUNNING?

Put a finger down if you've ever collaborated with a brand.

DOES A BRAND FOUNDED BY A RUNNER HAVE A BETTER SHOT AT SUCCESS?

Product innovation is key to earning the trust of early adopters.

# Feeling inspired?

## Get in touch

We are thrilled to work with brands from small to large on branding, community building and digital products.

