SHARE-OF-SEARCH BRIEF · EUROPE

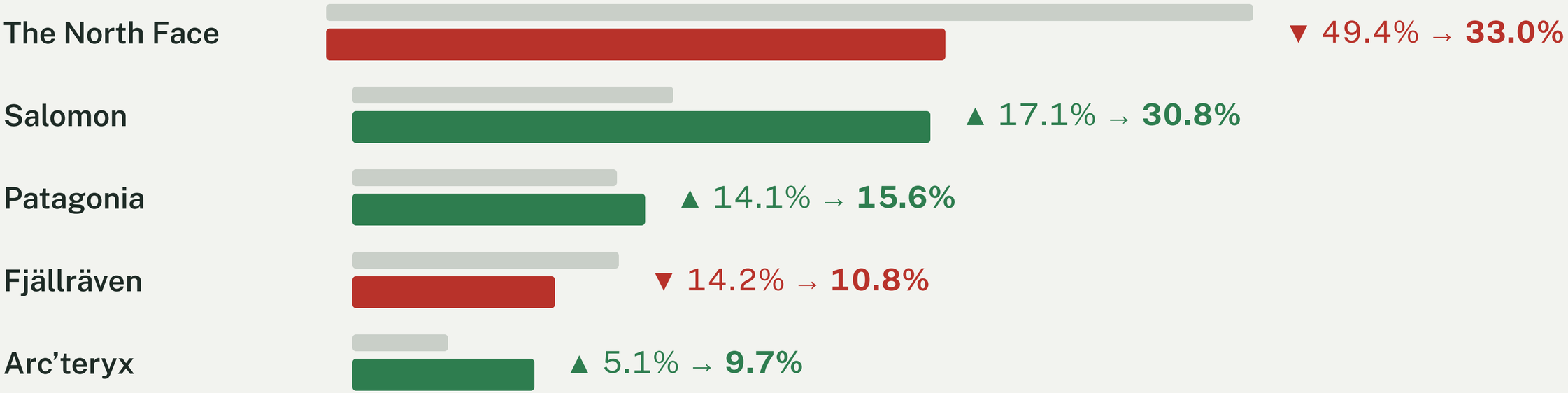
WHO'S WINNING SEARCH IN EUROPEAN OUTDOOR CATEGORY?

In this case study, I compared The North Face, Salomon, Patagonia, Fjällräven and Arc'teryx across six markets, plus the category demand behind them, from October 2021 to September 2026.

Musa Ayuba · Independent analysis from public Google Trends data · October 2026

SHARE OF SEARCH, SIX-MARKET AVERAGE

THE NORTH FACE LOST A THIRD OF ITS SHARE. SALOMON TOOK IT.



Thin grey bar: Oct 2021 to Sep 2022. Thick bar: Oct 2025 to Sep 2026, green and ▲ where share rose, red and ▼ where it fell. Source: Google Trends brand topics, NL, DE, UK, FR, BE and SE, simple average.

SHARE OF SEARCH BY MARKET, LAST 12 MONTHS

THREE DIFFERENT LEADERS ACROSS SIX MARKETS

Market	The North Face	Salomon	Patagonia	Arc’teryx	Fjällräven
United Kingdom	**44.5%**	24.5%	15.5%	10.8%	4.6%
Netherlands	**37.2%**	28.7%	14.3%	11.2%	8.7%
Germany	**37.1%**	24.3%	18.0%	10.8%	9.8%
France	31.0%	**48.8%**	11.7%	6.9%	1.6%
Belgium	33.7%	**35.9%**	16.0%	8.1%	6.3%
Sweden	14.5%	22.8%	18.2%	10.6%	**34.0%**

Bold: the leader in each market. Share of the five brands’ combined search interest, Oct 2025 to Sep 2026. Source: Google Trends brand topics.

CATEGORY DEMAND, LAST 12 MONTHS AGAINST 2021–22

SEARCH DEMAND IS MOVING TO TRAIL RUNNING

Trail running

+133%

Up 106% to 267% across markets, and still up 23% on last year. Busiest from April to September.

Rain jackets

+38%

Steady growth in every market. Searches spike in September.

Fleece

+1%

Flat over four years. Searches peak in November.

Median change in Google Trends interest across markets, Oct 2025 to Sep 2026 against Oct 2021 to Sep 2022. Each category on its own scale. Trail running for Sweden not available.

WHAT IT MEANS

THREE POSITIONS, THREE DIFFERENT JOBS

THE LEADER LOSING GROUND

The North Face: defend the core

The North Face share went down from 49% to 33%. The advice would be to protect the UK, Netherlands and Germany, where it still leads, and win back the trail searches it is ceding to Salomon.

THE FAST RISERS

Salomon and Arc’teryx: turn interest into loyalty

Growth this fast could mean new customers. Use CRM, community and repeat-purchase programmes to keep them once the trend cools.

THE STEADY PLAYERS

Patagonia and Fjällräven: follow the demand

Both brands lean on slower categories. The advice would be to build a credible place in trail running, and time campaigns to rain-jacket peaks in September and fleece in November.

Based on public search data only: hypotheses to test against each brand’s own sales and customer data.

HOW THIS WAS DONE

A METHOD THAT WORKS FOR ANY CATEGORY

1

Pick the set

Four or five competing brands, entered as Google Trends topics so every language counts.

2

Pull each market

Five years of monthly interest per country, then each brand’s share of the set’s total.

3

Add demand

Each product category pulled on its own, to read growth and seasonality without one swamping another.

4

Compare windows

Compare the latest 12 months against the first year and the year before, so trends and momentum both show.

Limits: Trends is relative and sampled, so it compares brands within a market, not absolute volumes between markets. The six-market figures are a simple, unweighted average.

Sources: Google Trends brand and category topics, Oct 2021 to Sep 2026. Full data and dashboard available on request.