



# Breaking Records The Asian Sneaker market 2025

Everything Brands needs to know to breakthrough and dominate the Asia Sneaker Market in 2025



# Introduction



1. Understanding the Global Sneaker Market

2. Consumer Spending and Market Behavior

3. The Chinese Market

4. The Southeast Asian Market

5. The Rise of Value-Driven and Emotionally-Resonant Brands

6. Diverse Consumer Groups and Their Roles

7. Executive Summary

# Index

# 1. Understanding the Global Sneaker Market



# The sneaker market in Asia: an **overview**

The global sneaker market is projected to reach **\$34 billion** by 2025, and approximately **\$37.4 billion** by 2030. China is the largest footwear consumer, responsible for **17.9%** of global volume.

In terms of emerging markets, Southeast Asia presents strong growth potential. With a population exceeding **650 million** and an average age of 31, of which 63% are under 40, the region is experiencing rapid urbanisation and middle-class expansion<sup>[1]</sup>. Demand for affordable, fashionable footwear is rising quickly.



<sup>[1]</sup> Tim Chuah. (2025). Euromonitor International. The Rise of Chinese Brands is Reshaping Southeast Asia's Consumer Landscape

# Key market trends and consumer expectations

In recent years, the global sneaker industry has experienced remarkable growth, driven primarily by three key trends: casualization, functionality, and sustainability.

## Casualization

This trend reflects the growing use of sneakers beyond athletic settings. Consumers now wear sneakers in daily life, workplaces, and even formal occasions, turning them into essential fashion and lifestyle items. This shift has expanded the consumer base significantly and blurred the lines between performance shoes and lifestyle sneakers.

## Functionality

At the same time, the market is becoming increasingly polarized. Geopolitical risks and economic uncertainties have made it especially difficult for mid-range brands. On one end, luxury athletic footwear continues to gain traction, while on the other, budget-conscious consumers are flocking to affordable performance products. In this context, modern consumers are not just seeking cheaper options—they are seeking the best possible quality within their budget. As a result, there is rising demand for durability, quality, and versatility, particularly in markets experiencing economic headwinds<sup>[2]</sup>

## Sustainability

Sustainability has also emerged as a major driver in consumer decision-making. Shoppers increasingly prioritize brands that use eco-friendly materials, ethical manufacturing practices, and align with broader societal values. In line with regulatory shifts—such as the EU Strategy for Sustainable Textiles and California's Climate Corporate Data Accountability and Risk Acts passed in October 2023—brands are being pushed to extend product lifecycles and reduce environmental footprints.

<sup>[2]</sup> Marguerite LeRolland. (2024). Euromonitor International. Top Trends in Global Apparel and Footwear in 2024 and Beyond



# 2. Consumer Spending and Market Behavior



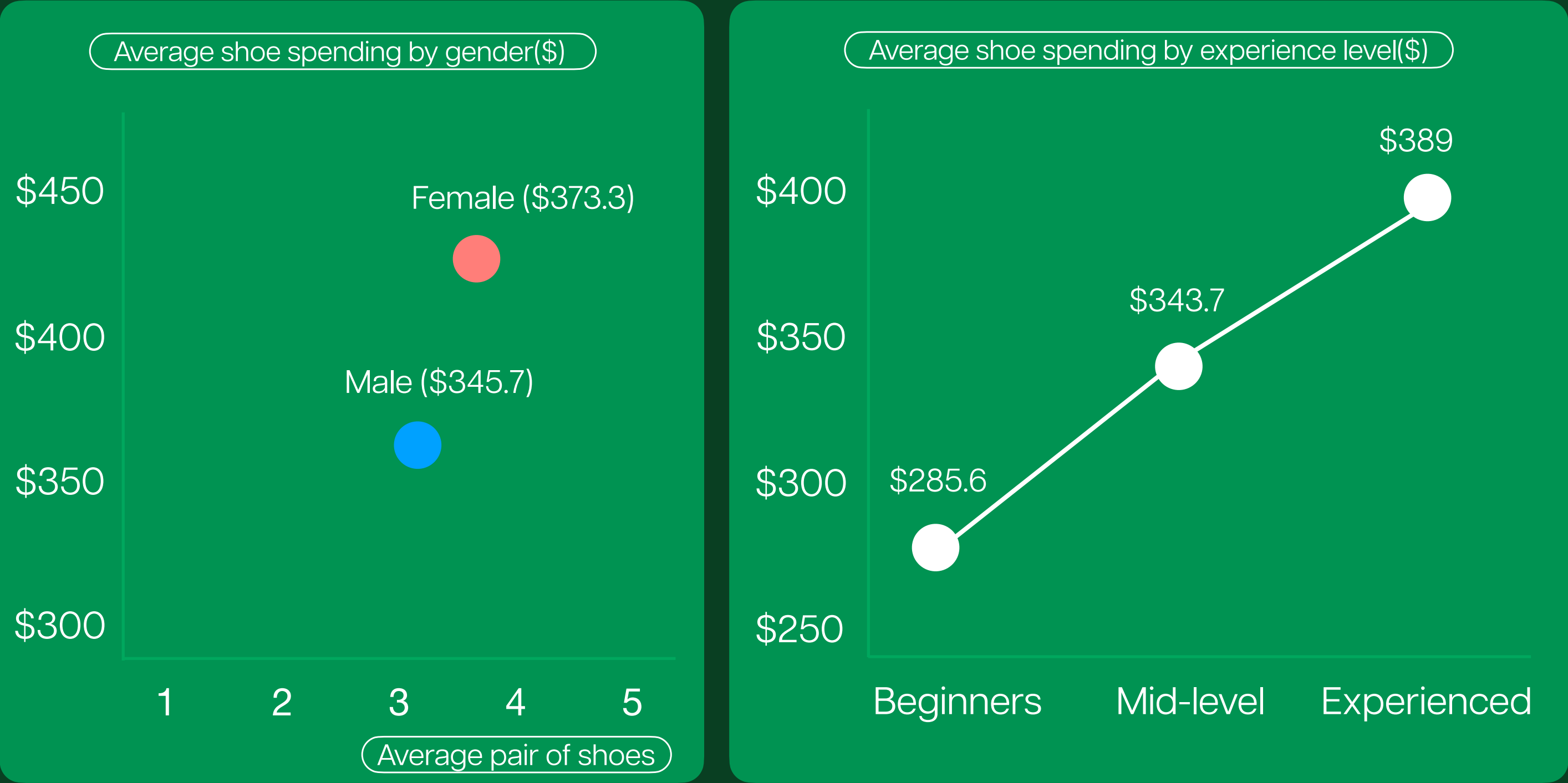


# Spending patterns in the global sneaker market

In terms of annual spending, Chinese consumers purchase around **1.7 pairs** per year with an average price of **\$17**. In Southeast Asia, sneaker consumption per capita is expected to reach **1.35 pairs** by 2025. These data reflect the average shoe budget for people in different regions. Notably, 92% of the global footwear market is non-luxury, confirming the dominance of mass and value segments<sup>[3]</sup>.

<sup>[3]</sup> Statista. (2024). Footwear - Southeast Asia

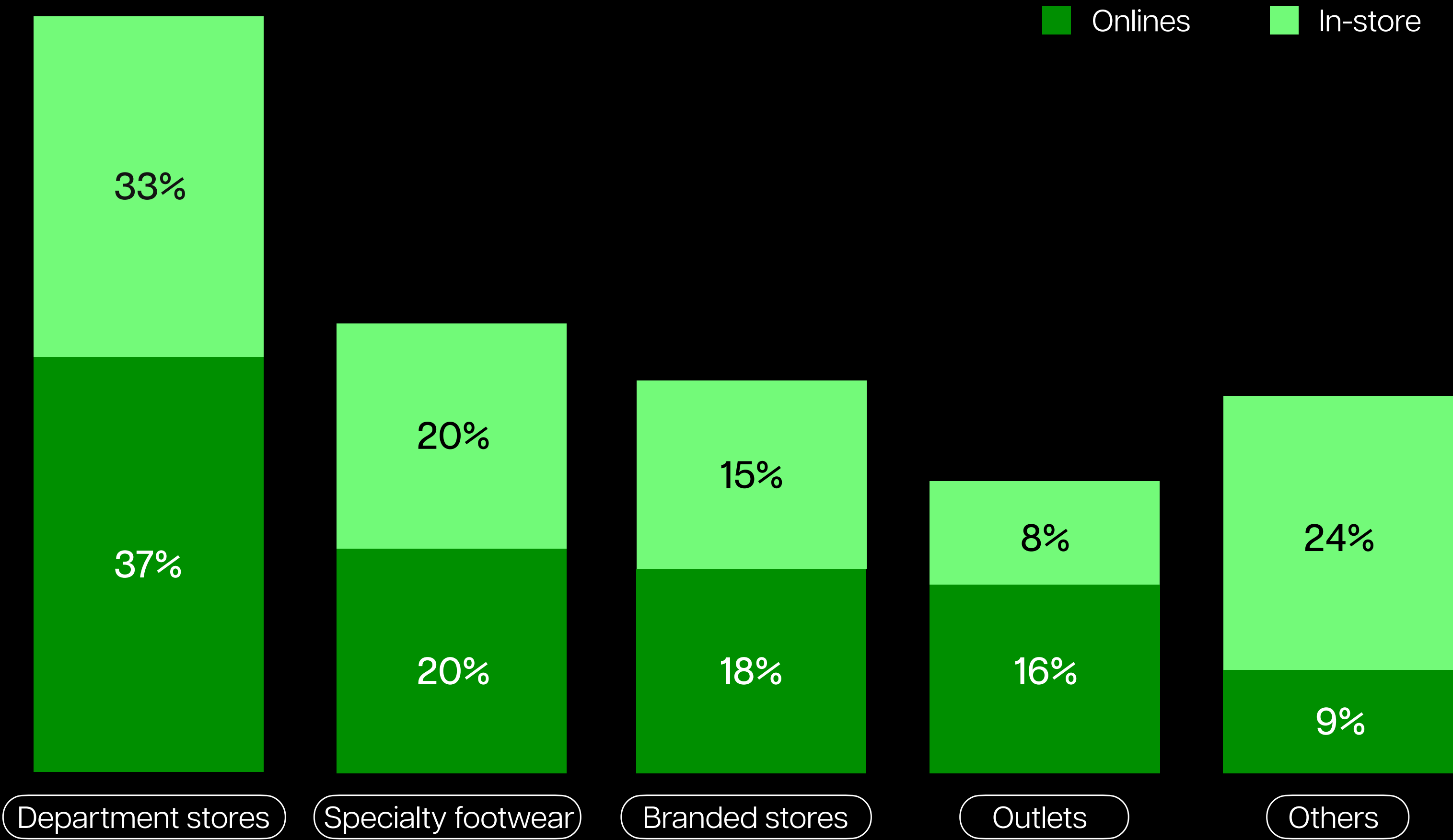
Gender differences also play a role: female runners spend an average of \$373.3 per year on shoes, about 8% more than male runners at \$345.7, though men purchase more pairs annually (3.5 pairs vs. 3.1). Among more experienced runners (8+ years), annual spending reaches \$389, compared to \$343.7 for mid-level runners and \$285.6 for beginners. These insights support a tiered product strategy—one that caters to both high-usage athletes and everyday lifestyle users.





# Distribution channels and digital trends

Despite the digital boom, 4.6 billion consumers still prefer buying shoes in physical stores, while 2 billion now favor online shopping. Department stores lead in-store shopping with a 33% share, followed by specialty shoe websites (20%) and online brand stores (16%). It is estimated that by the next few years, 75% of footwear purchases will occur online.

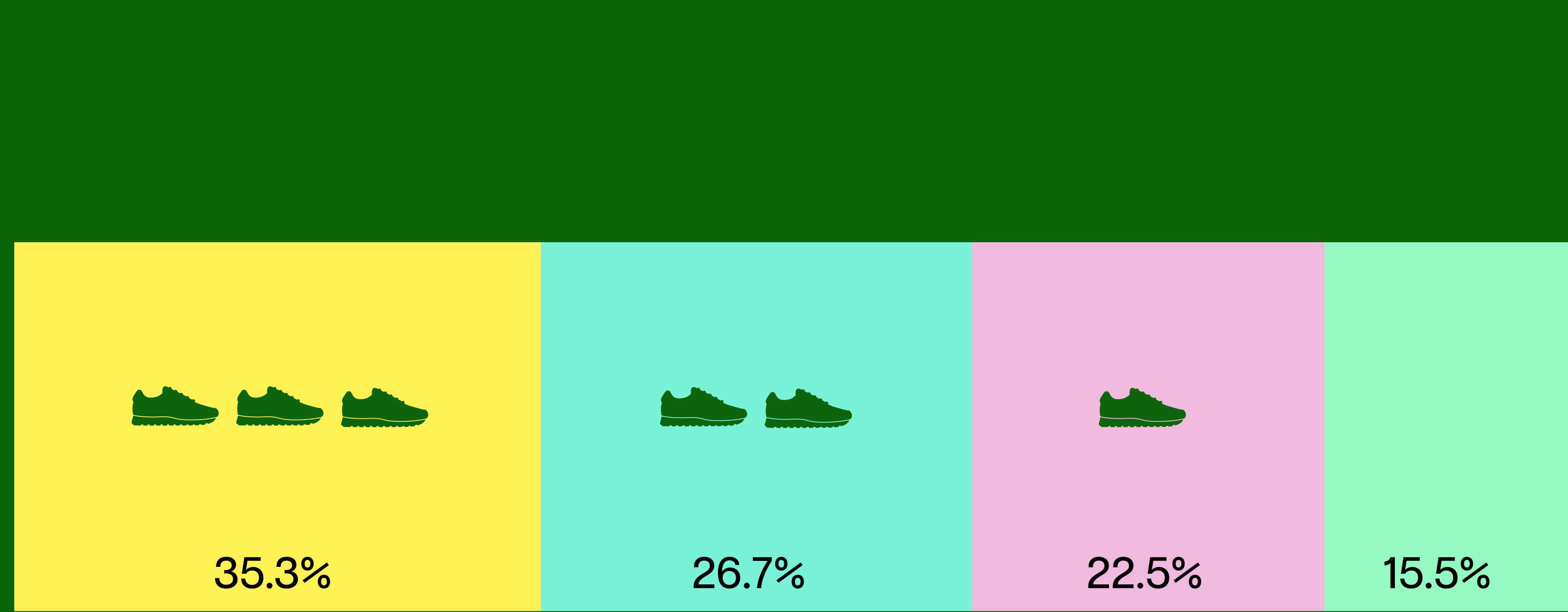




# Shopping frequency and demographics

Globally, 35.3% of consumers buy more than three pairs of shoes per year, 26.7% buy two pairs, 22.5% buy one pair, and 15.5% of people don't buy any.

73% of adults purchase shoes at least once every six months. Meanwhile, 48% of parents buy new shoes for their children one to two times per month—revealing an opportunity for family or children's product lines.



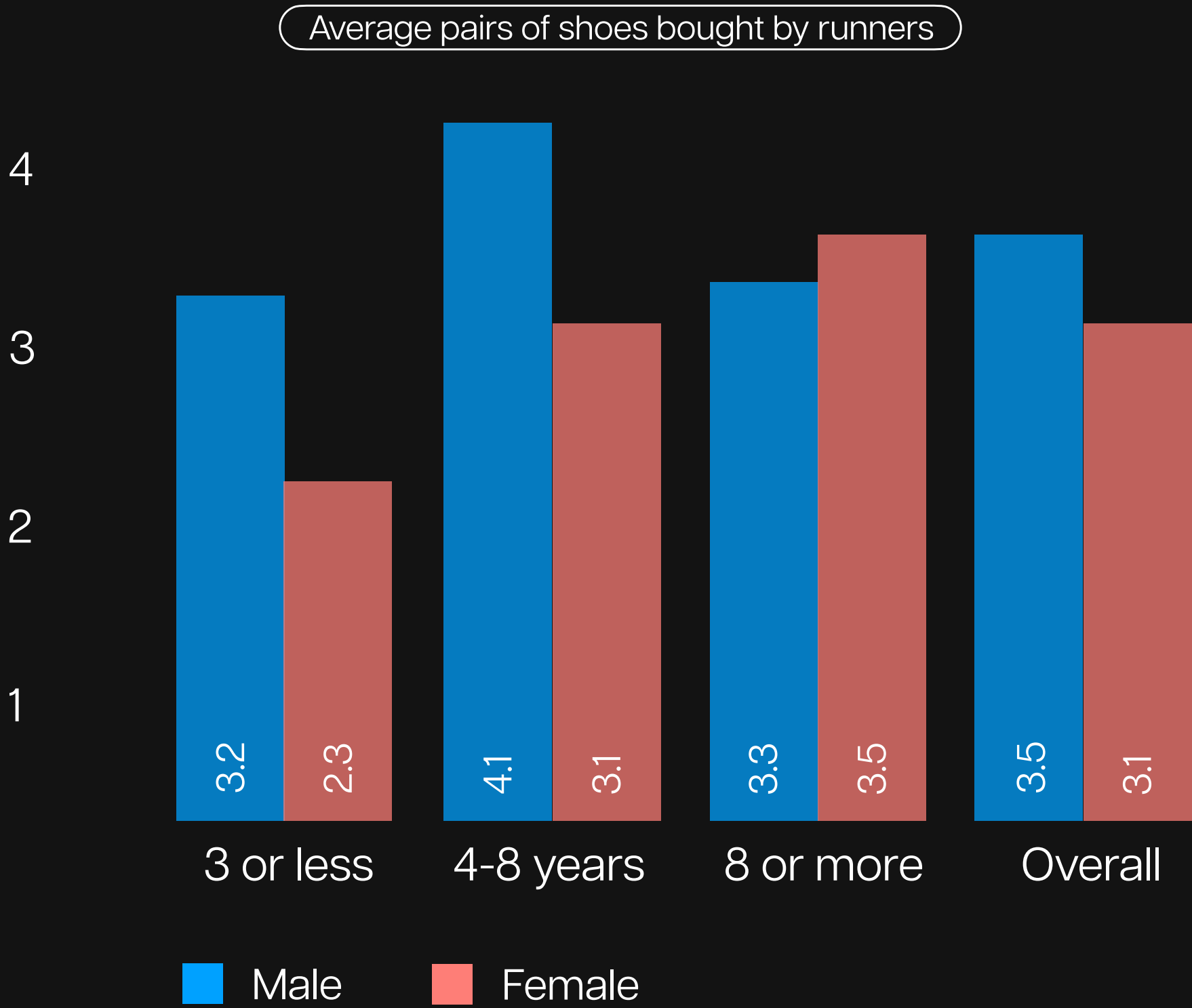
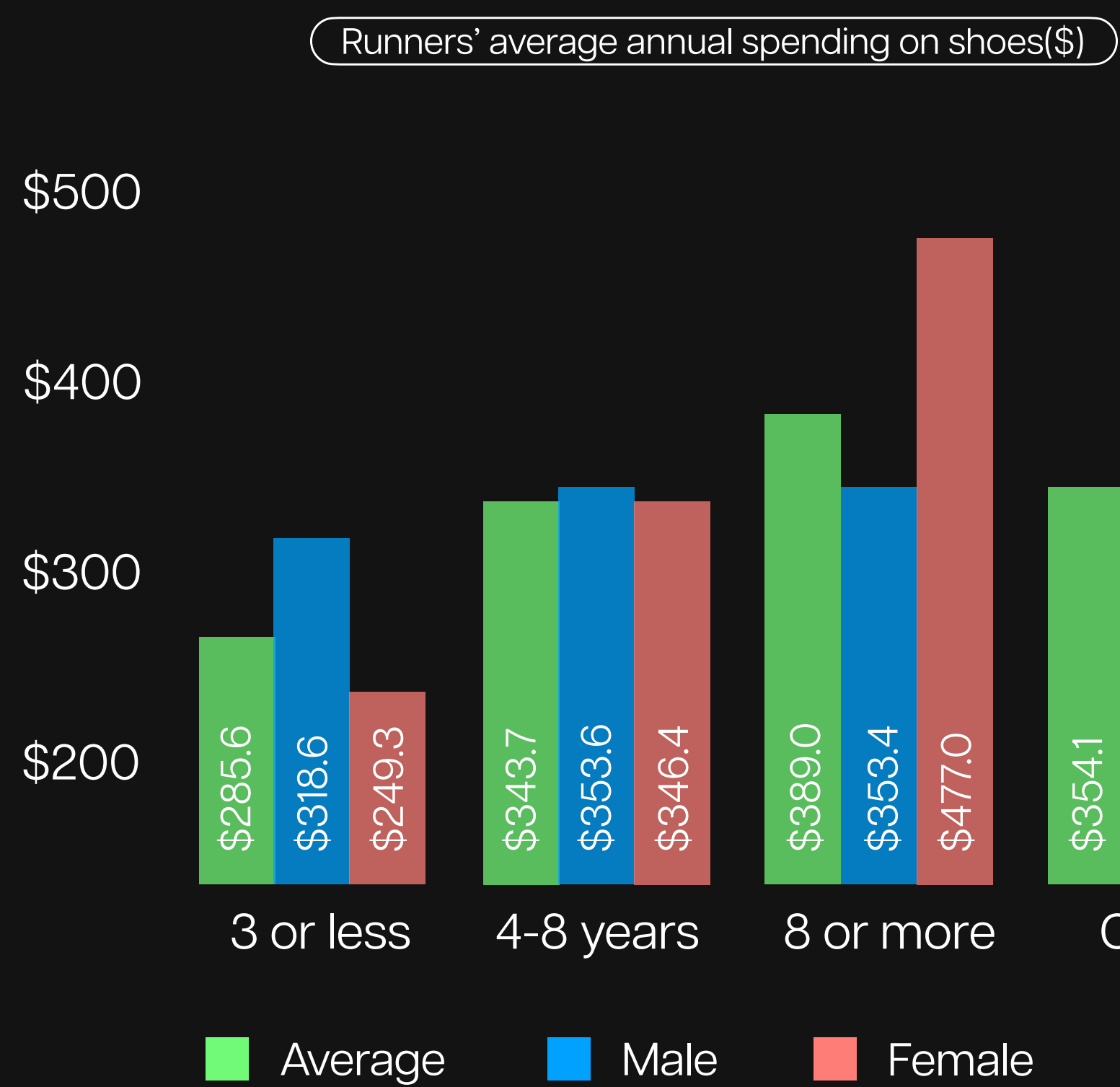
Frequency and proportion of consumer purchases



# Runners' consumption behaviour

On average, runners globally spend approximately \$3,541 annually on footwear, a figure that encompasses various types of shoes used across training, competition, and lifestyle needs.

Experience plays a critical role in spending patterns. Runners with over eight years of experience tend to invest more in performance footwear, spending an average of \$389 per year specifically on running shoes. Those with 4 to 8 years of running experience spend around \$343.7 annually, while novice runners (with less than 3 years of experience) spend roughly \$285.6 per year.





# Runners' consumption behavior

Among these groups, male runners with 4 to 8 years of experience exhibit the highest average annual expenditure at approximately \$353.6, purchasing an average of 4.1 pairs per year. Overall, male runners tend to purchase about 3.5 pairs annually.

Interestingly, female runners with over eight years of experience allocate a higher total footwear budget, spending approximately \$477 per year. Although they purchase slightly fewer pairs on average (3.1 pairs annually), those with extensive experience tend to consume up to 3.5 pairs of running shoes each year due to higher usage intensity<sup>[4]</sup>.

These insights suggest that sneakers brands can effectively tailor their product offerings based on runner experience and gender. Premium, performance-oriented shoes may resonate strongly with experienced athletes, while comfort-driven, accessibly priced options may better serve less experienced or lifestyle-focused consumers. Understanding these behavioral patterns will be essential for shaping brands' product roadmap and messaging across key consumer segments.



# 3. The Chinese Market



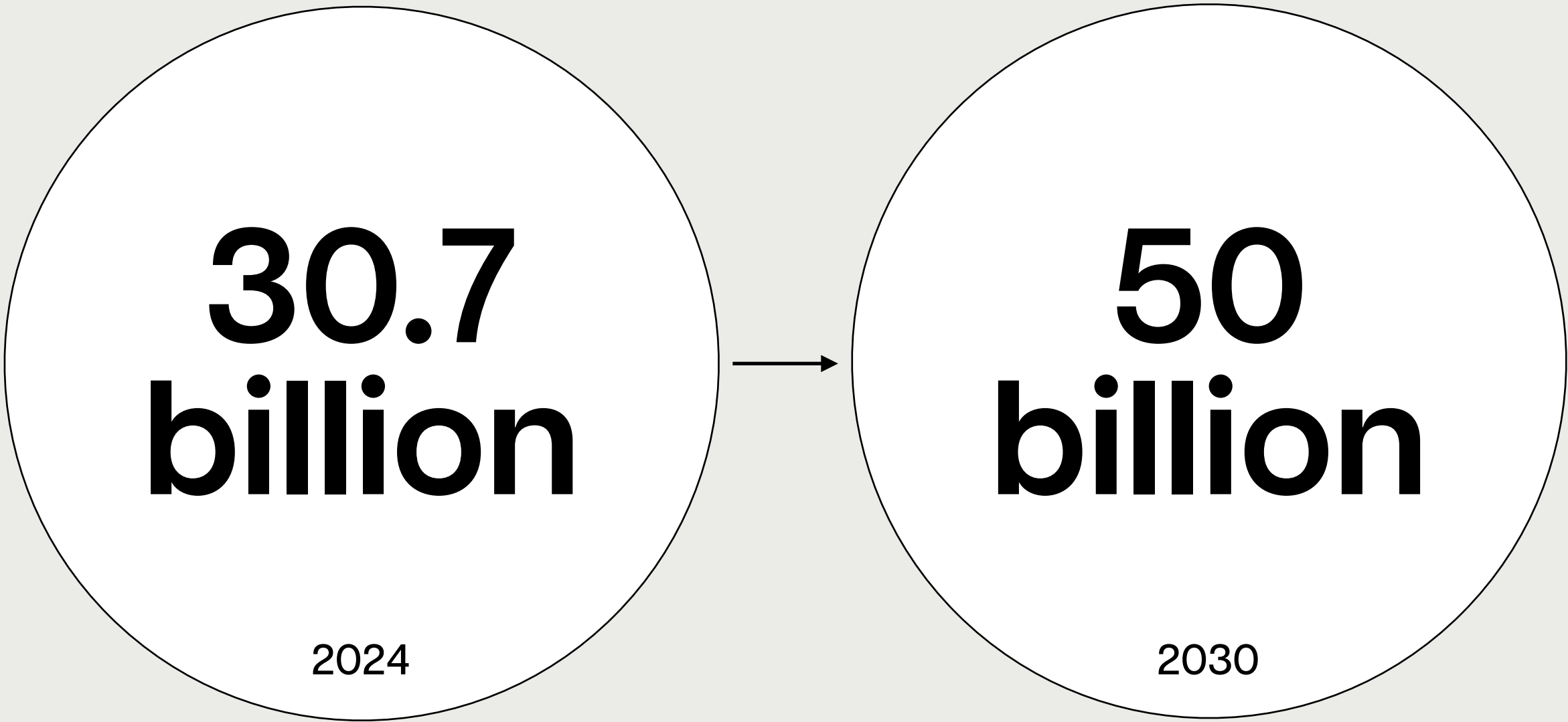
# The booming Chinese running shoe market

The Chinese running shoe market has experienced rapid expansion in recent years, driven by a combination of supportive government policies, the booming race economy, and the widespread popularity of running as a mainstream fitness activity.

As of 2024, the market size for running shoes in China has reached 30.7 billion RMB, with projections indicating it will exceed 50 billion RMB by 2030, maintaining a steady compound annual growth rate (CAGR) of 8–10%. More broadly, the athletic footwear and apparel sector is expected to surpass 500 billion RMB by 2025, with the youth segment growing even faster, at an estimated CAGR of 12.5%.

China now boasts over 500 million active runners, making running the most popular form of exercise nationwide. This massive participant base offers an expansive and diversified consumer foundation for the running shoe industry.

Market size





# Market segments and positioning spaces

The global sneaker market is characterized by diversity, evident not only in price points and product features, but also in regional, demographic, and cultural variations. To compete effectively on the international stage, sneaker brands must identify and understand their most relevant market segments, then strategically position themselves within these areas.



# The two forces of China's running growth

Growth in the Chinese market is primarily driven by two key engines:

**Firstly**, the policy support. The recently implemented Education Power Strategy Plan (2024–2035) mandates a minimum of two hours of daily physical activity for primary and secondary school students. This policy has directly triggered a surge in demand for physical education testing shoes. According to Douyin E-Commerce data, sales of such shoes in **March 2025 grew by 976% month-over-month**, with brands like Anta and Li-Ning entering the top five best-selling lists. This policy-backed youth segment is becoming increasingly influential in driving growth.



**Secondly**, the rise of the race economy. In 2024 alone, 671 road running events were held nationwide in China, attracting 6.56 million participants. An estimated 18,000 runners completed marathons in under three hours, indicating a sharp increase in professional-grade racing demand. This shift is fueling interest in high-performance footwear equipped with features like responsive midsoles and carbon plates<sup>[5]</sup>.





# The key consumer segments

What are the key consumer segments in the Chinese market?

## 1. Youth Fitness Testing Segment

Over 20 million students were affected by the 2024 national reform in physical education exams. Parents are increasingly attentive to performance footwear for their children, particularly in the 200–400 RMB price range. This group represents a highly responsive and rapidly growing consumer base.



## 2. Serious and Competitive Runners

Approximately 64% of Chinese runners own more than two pairs of running shoes, with “serious runners” (those with marathon PBs under 4 hours) spending an average of 1,200 RMB annually on footwear. This group pays close attention to midsole responsiveness, carbon plate stiffness, and other performance metrics.

## 3. Women Runners – A Rising Segment

Female participation in running is increasing rapidly. However, the market still lacks product lines tailored to women’s foot anatomy, aesthetic preferences, and niche use cases (e.g., recovery shoes for postpartum or prenatal exercise). There is substantial untapped potential in the female running shoe category.





# The key consumer segments

What are the key consumer segments in the Chinese market?

## 4. Silver Economy – Elderly Consumers

As China becomes an aging society, demand is rising for walking and jogging shoes designed for older adults. These consumers require footwear that prioritizes cushioning, slip resistance, stability, and easy on/off access, representing a sizeable and underserved segment.



## 5. Heavyweight Runners

There is a clear market gap for runners with larger body types who need enhanced arch support and shock absorption. Purpose-designed shoes for this group can meet specific biomechanical needs while providing market differentiation.



## 6. Youth Students

In China, where over 20 million students are impacted by mandatory fitness testing—children and teenagers have emerged as a high-growth, high-need consumer segment. Their physiological development requires not only frequent shoe replacements due to fast foot growth, but also footwear that supports proper biomechanics and athletic development.



## 7. Lower-Tier City Runners

Runners in third-tier and lower cities represent a high-growth group. However, the penetration of professional running shoes in these regions remains relatively low<sup>[6]</sup>. By offering high cost-performance products and building accessible sales channels (e.g., e-commerce, localized distributors), brands can effectively tap into this underdeveloped but promising market.





# Consumer stratification in China’s running shoe market

From a pricing perspective, the Chinese running shoe market demonstrates clear consumer stratification across price tiers. The premium segment (800 RMB and above) is primarily dominated by international brands, accounting for approximately 35% of total market share. Brands like HOKA and On Running have gained notable traction within this tier, particularly through their signature maximalist midsole designs.

The mid-range segment (400–800 RMB) is fiercely competitive, where leading domestic brands such as Xtep and Li-Ning have achieved strong performance, jointly capturing more than 60% of market share in this category. Meanwhile, the mass-market segment (below 400 RMB) is characterized by emerging brands and value-driven products.



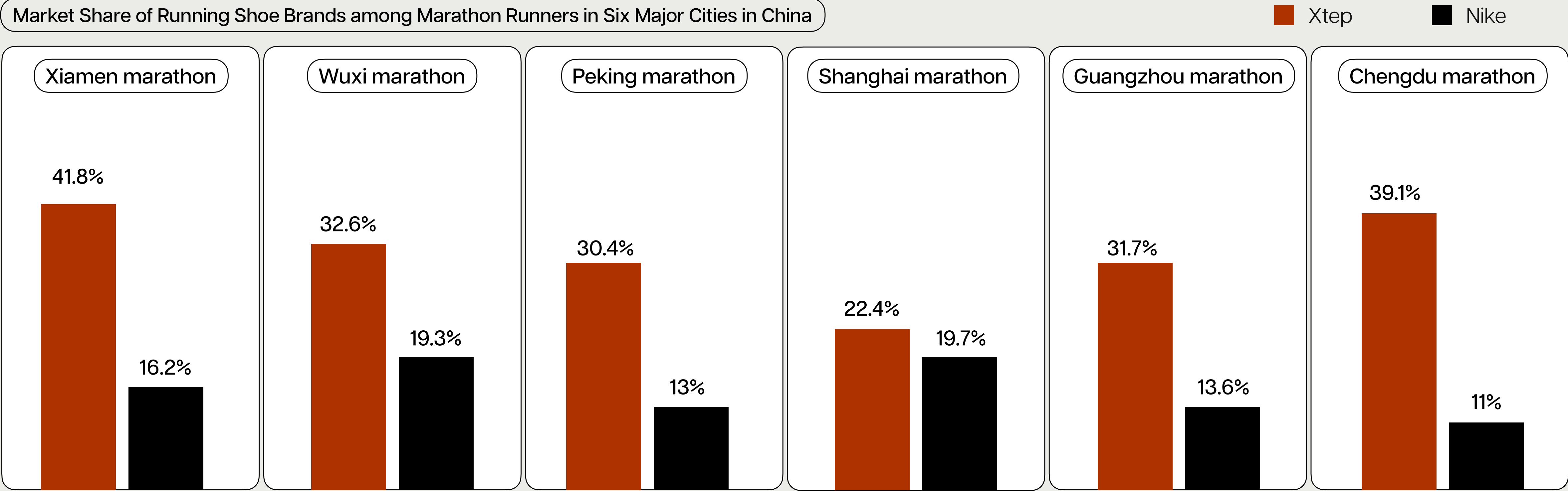


# Chinese footwear gains ground

Domestic brands are increasingly closing the gap with international competitors in professional performance. In 2024, among runners in China who completed marathons in under 3 hours, four out of the top ten most-worn shoe brands were domestic, with Xtep leading the pack at 31.7%. Conversely, wear rates for traditional international giants like Nike have shown signs of decline.

In public preference rankings, domestic brands now stand shoulder to shoulder with international ones, signaling a shift in both technical capability and consumer perception of Chinese footwear brands.

Market Share of Running Shoe Brands among Marathon Runners in Six Major Cities in China



\*Data from: Yuepao data research institute



# Product development trends

The Chinese running shoe market is witnessing the emergence of several distinctive product development trends, reflecting both technological innovation and evolving consumer expectations:

## 1. Technology Democratization and Use-Case Segmentation

Brands are increasingly extending advanced technologies—once reserved for elite competition models, such as carbon plates and next-generation midsole foams—into mass-market offerings.

Product portfolios are also becoming more granular, with specialized models designed for a wide range of scenarios, including race-day performance, tempo training, casual jogging, and even daily commuting. This “every foot has its fit” approach aims to satisfy a growing demand for purpose-built footwear that caters to various fitness goals, body types, and running levels.



# Product development trends

The Chinese running shoe market is witnessing the emergence of several distinctive product development trends, reflecting both technological innovation and evolving consumer expectations:

## 2. Extreme Value-for-Money

Domestic brands are redefining cost-performance expectations by offering high-spec products at accessible price points. This trend reflects a broader movement in which Chinese consumers increasingly seek premium function at affordable prices.



# Product development trends

The Chinese running shoe market is witnessing the emergence of several distinctive product development trends, reflecting both technological innovation and evolving consumer expectations:

## 3. Lightweight Comfort as a Core Priority

Lightweight construction has become a critical selling point, especially for speed-focused models and physical fitness test shoes aimed at students. Among the general running population, comfort and protective cushioning remain top priorities, emphasizing the need for well-balanced designs that cater to both performance and everyday wearability.



# Product development trends

The Chinese running shoe market is witnessing the emergence of several distinctive product development trends, reflecting both technological innovation and evolving consumer expectations:

## 4. Sustainability and Eco-Friendly Materials

Although still in its early stages, the trend toward sustainable design is gaining momentum. A growing number of brands are experimenting with bio-based or recycled materials for uppers and midsoles, reflecting both environmental awareness and long-term innovation potential. While cost remains a limiting factor, sustainability is increasingly viewed as a differentiator for future growth, especially among younger and eco-conscious consumers<sup>[7]</sup>.

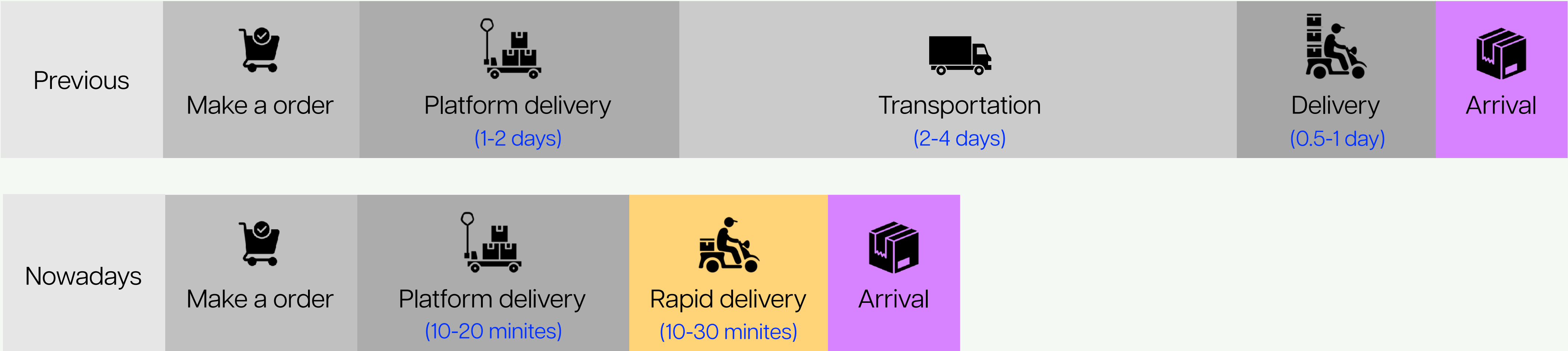


# Evolving sales channels and marketing strategies

In terms of sales channels and marketing strategies, the Chinese market is undergoing rapid evolution. The rise of on-demand retail—enabled by food delivery infrastructure—has made instant delivery a reality. Collaborations between brands and platforms like Meituan Flash Sale now allow consumers to receive running shoes within 30 minutes, satisfying spontaneous and time-sensitive shopping needs.

Moreover, brands are increasingly focused on direct consumer engagement. For example, Xtep announced a comprehensive Direct-to-Consumer (DTC) strategy, aimed at improving the retail experience and streamlining distribution efficiency<sup>[8]</sup>. Platforms like Douyin (TikTok China) and Xiaohongshu (RED) serve as hidden catalysts of consumption<sup>[9]</sup>, where KOL and KOC reviews, product placements, and social seeding campaigns shape purchasing behavior across multiple consumer segments.

Hashtag campaigns such as #StreetRunningFestival (#马路生活节) have transformed professional athletic events into cultural celebrations, blurring the line between elite competition and everyday participation. While marathon sponsorships remain a standard promotional tactic, top-tier brands are going further by developing proprietary race IPs and nurturing loyal running communities. Examples include Xtep’s “X Runner Tribe (特跑族)” and 361°’s “Track 3” 10K series (三号赛道), which help build user stickiness and accumulate long-term brand equity.





# The future of running shoes in China

In conclusion, China's running shoe market is in a phase of robust development, marked by consistent expansion, evident stratification, and increasingly diversified consumer demands. With strong policy support, rising fitness consciousness, and rapid channel innovation, the market offers abundant opportunities for brands that can tailor their strategies to specific segments and adapt to evolving competitive dynamics.



# Navigating positioning models

In the context of China’s evolving running shoe market, a highly strategic and differentiated positioning is the one which can be defined as “performance-per-price professionalism.” This positioning capitalizes on a structural gap within the market—an overlooked space between two dominant pricing and performance models<sup>[10]</sup>

On a global scale, the running shoe market is typically divided between two ends of the spectrum: At the top are international giants like Nike and Adidas, which follow a “high-performance, high-brand premium” model. These brands command top-tier pricing by leveraging extensive R&D capabilities and large-scale marketing budgets. At the lower end, a wide range of affordable or local brands focus on “low-price, basic functionality”, targeting casual users and light fitness participants.



# The niche of accessible professionalism

In between lies a neglected "value-performance" segment. Consumers in this segment are typically dedicated amateur runners, experienced enthusiasts, or performance-driven general users, and they share three defining characteristics:

The trajectory of China's domestic running shoe industry has created fertile ground for this value-driven niche. Leading local brands such as Anta, Li-Ning, and Xtep have made significant strides in closing the gap with, or even surpassing, international players in terms of performance technology. For example, Xtep now leads in carbon-plated footwear adoption among sub-3-hour marathon runners, while brands like Erke have driven down the entry price for carbon-plate running shoes to as low as ¥399, proving that affordable technical excellence is not only achievable but commercially viable.

## Technically Informed:

These consumers possess a deep understanding of running shoe technologies—such as midsole compounds, carbon plate applications, and upper material construction. They are skeptical of brand marketing hype and instead value objective performance data.

## Moderately Price-Sensitive:

While they are willing to pay for real performance gains, they are unwilling to subsidize excessive brand premiums or marketing overhead. Their core pursuit is maximum value per yuan (RMB)—authentic innovation at a rational price.

## Functionally Purposeful:

Their usage scenarios are highly specific, including tempo runs, long-distance training, and even competitive racing, rather than just casual wear or street-style fashion.



# Value-driven performance as the new standard

Despite this momentum, many performance-oriented shoes in the market still suffer from two key issues:

1. Top-tier models from global brands remain prohibitively expensive for most consumers.
2. Domestic offerings, while affordable, often lag in design innovation and brand storytelling, limiting emotional connection and perceived prestige.

This is precisely where brands can establish a powerful brand narrative. By adopting the positioning of “elite-level performance made accessible,” they can appeal to the large and growing cohort of value-conscious but performance-demanding consumers. This segment is no longer content with either underwhelming budget shoes or overpriced premium options; they are looking for professional-grade functionality at a realistic price.



# 4. The Southeast Asian market





# A diverse and fast-growing landscape

The Southeast Asian running shoe market is a rapidly growing, dynamic, and highly diverse landscape, marked by surging online consumption and increasingly complex consumer expectations. With an annual e-commerce growth rate exceeding 100%, the sports and outdoor footwear sector in the region has already surpassed \$300 million in market size, indicating immense potential for brands that can localize and scale effectively.

However, notable differences exist among individual countries. Vietnam leads in terms of overall spending on sportswear and outdoor categories, while Indonesia holds the largest market share in the running shoe segment. Meanwhile, the Philippines dominates in outdoor activity gear and fitness accessories. These variations highlight the importance of tailored strategies for market entry and expansion across the region.





# Consumer buying behaviors

Southeast Asian consumers exhibit a unique blend of preferences shaped by their lifestyles, cultural norms, and economic conditions. Three key characteristics define their buying behavior:

## 1. Fusion of Functionality and Fashion

The rising popularity of the athleisure trend reflects a growing demand for sneakers that balance performance and everyday style. Consumers seek footwear that is both technically functional and visually appealing—offering comfort, ergonomic design, and fashion-forward aesthetics. In markets like Malaysia, there is particularly strong interest in models that deliver cushioning, urban versatility, and all-day wearability<sup>[11]</sup>.



# Consumer buying behaviors

Southeast Asian consumers exhibit a unique blend of preferences shaped by their lifestyles, cultural norms, and economic conditions. Three key characteristics define their buying behavior:

## 2. High Price Sensitivity

The macroeconomic backdrop in many Southeast Asian countries has made consumers especially value-conscious. Promotional offers, bundling deals, and membership incentives play a significant role in influencing purchase decisions. The market is primarily dominated by mid-to-low price segments, although preferences vary by country. For instance, Thai consumers show strong affinity for running shoes priced between \$0–\$100, while Singaporean shoppers demonstrate higher demand for mid- to premium-tier products





# Consumer buying behaviors

Southeast Asian consumers exhibit a unique blend of preferences shaped by their lifestyles, cultural norms, and economic conditions. Three key characteristics define their buying behavior:

## 3. Professional Meets Casual

While professional performance footwear continues to see robust growth—particularly in countries like Vietnam, where running and hiking are widespread<sup>[12]</sup>—there is also steady demand for casual sportswear shoes in more lifestyle-oriented markets. This dual nature of the market presents opportunities for brands to offer segmented product lines that cater to both serious athletes and style-driven urban consumers.



# A three-tier structure

The competitive landscape of Southeast Asia's running shoe market is characterized by a three-tier structure: dominant international players, rising local brands, and strategically positioned Chinese entrants.

Western giants such as Nike and Adidas maintain strong influence across the region, especially in the high-end performance and lifestyle segments. In countries like Vietnam, these brands continue to command a significant share of the premium market, supported by widespread brand awareness and a legacy of high-performance credibility. Meanwhile, Japanese brand ASICS has carved out a unique position by blending technical excellence with slightly more accessible pricing, gaining popularity particularly in the professional running segment in Vietnam.

Beyond these global players, local brands are increasingly making their presence felt. In Vietnam, Biti's has successfully expanded into the running category with its "Hunter" line, which targets urban consumers seeking affordability and local identity. Vietrek, a domestic brand specializing in outdoor and hiking footwear, is steadily gaining traction among adventure enthusiasts. In Indonesia, ORTUSEIGHT is an emerging name capturing local market share by focusing on youth-centric design and functional value.

While these local brands have achieved notable success, many still concentrate on aesthetic appeal and price competitiveness, and often lack the technological edge and R&D capacity to compete directly with established international brands on innovation and performance. This opens up opportunities for strategically positioned players to fill the gap.

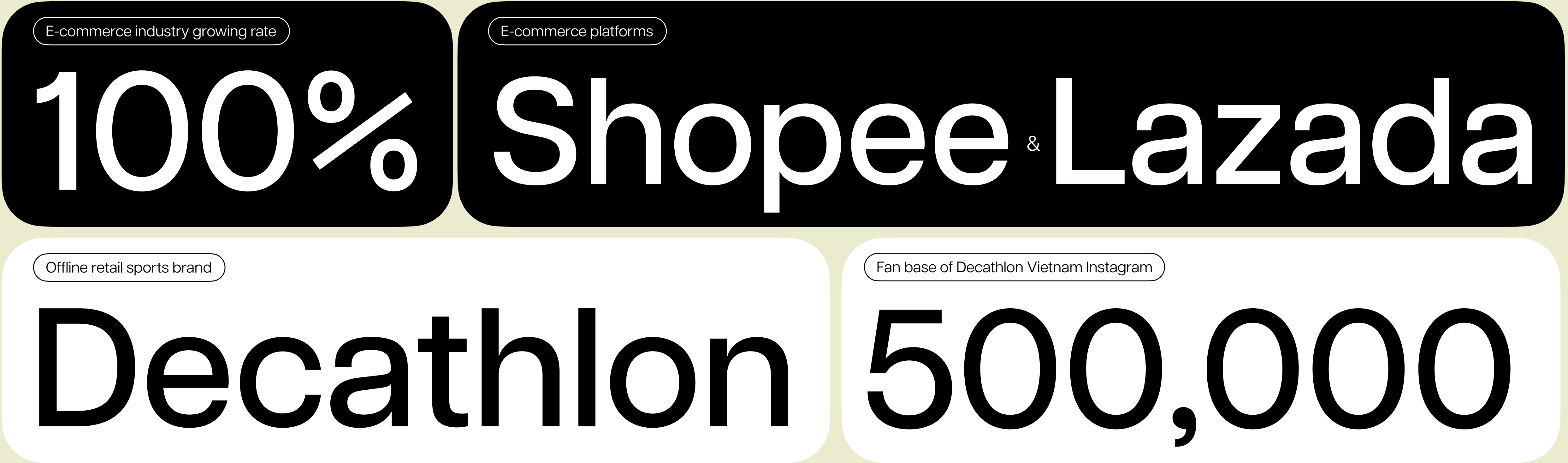
At the same time, Chinese brands have made significant inroads in fitness equipment and sports accessories and are now eyeing footwear as a growth category. Leveraging their strengths in cost efficiency, e-commerce expertise, and agile supply chains, these brands are well positioned to scale quickly—particularly if they can tailor their design sensibilities to local consumer tastes.



# A hybrid approach

E-commerce is playing an increasingly vital role in the distribution of running shoes across Southeast Asia. The sports and outdoor segment of the e-commerce industry is growing at an annual rate exceeding 100%<sup>[13]</sup>, significantly outpacing traditional offline channels. Platforms like Shopee and Lazada dominate the digital retail landscape, providing brands and sellers with access to broad consumer bases and leveraging platform-specific marketing tools, seamless logistics, and data-driven campaign strategies.

Despite the rapid rise of online channels, offline retail still holds strategic importance, especially for providing tangible product experiences and building consumer trust. For example, Decathlon, a French sportswear giant, operates a multi-channel distribution strategy in Vietnam, maintaining seven physical stores while actively engaging online audiences through social media—with nearly 500,000 Instagram followers. This hybrid approach—combining the convenience and reach of e-commerce with the trust and experiential value of brick-and-mortar stores—illustrates the optimal path forward in Southeast Asia's evolving retail ecosystem.





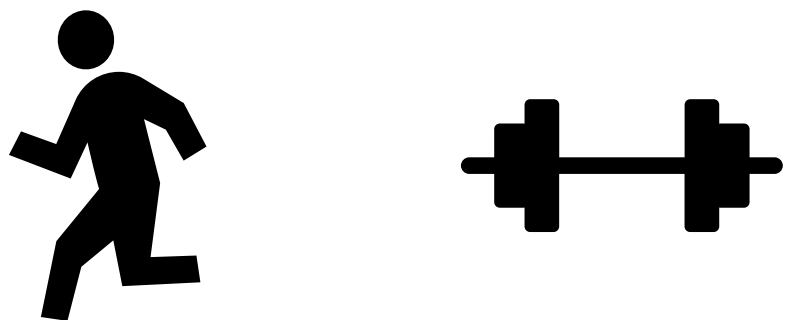
# Rising incomes, rising expectations

The youthful demographics of Southeast Asia further enhance the region’s appeal. In Vietnam, nearly 70% of the population is under the age of 35, and approximately one-third identify as sports enthusiasts<sup>[14]</sup>. Post-COVID, there has been a marked increase in health consciousness and physical activity participation, fueling ongoing demand for both performance-oriented and lifestyle-focused athletic footwear.

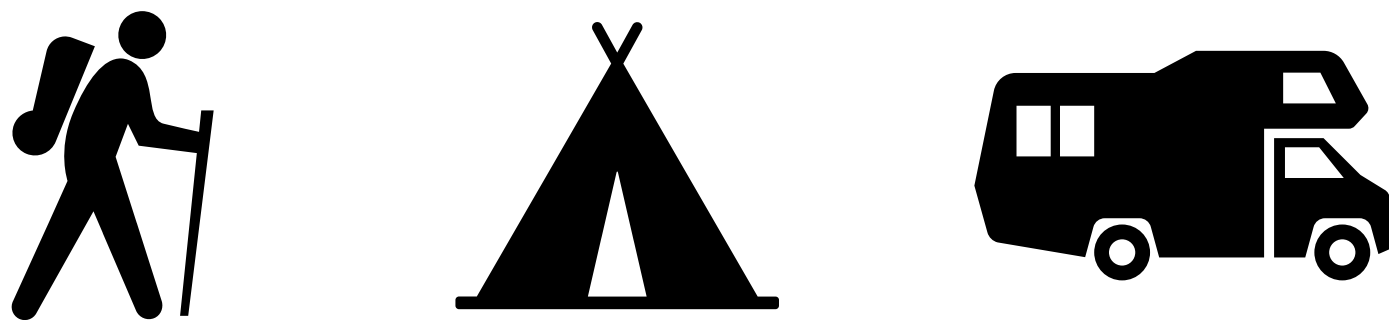
At the same time, rapid economic development and the expansion of the middle class are driving higher disposable incomes, resulting in greater consumer willingness to invest in quality sports products. However, Southeast Asian consumers remain highly price-sensitive while being fashion-conscious. To succeed, brands must strike a delicate balance—offering affordability, comfort, and style, while differentiating through innovation, functionality, and increasingly through sustainability certifications.

Beyond the core running and fitness categories, the growth of outdoor activities such as hiking, trekking, and camping presents further opportunities. The rising popularity of these pursuits has expanded consumer demand for multi-functional and technically advanced footwear, particularly in countries like Vietnam, Indonesia, and the Philippines. For brands, this trend offers a chance to diversify into adjacent product categories that combine performance, durability, and outdoor versatility.

Not only



But also...





# Southeast Asia's footwear future

Southeast Asia presents a highly dynamic and rapidly evolving landscape for running shoe brands. Its youthful demographics, rising health awareness, expanding middle class, and booming e-commerce infrastructure create favorable conditions for both performance-driven and lifestyle-oriented footwear offerings. However, the market's diversity—across consumer preferences, price sensitivity, and levels of brand development—demands a highly localized and adaptable approach.

Southeast Asia offers both volume potential and strategic positioning. By integrating value pricing, product comfort, regional partnerships, and digital-first strategies, brands can carve out a meaningful presence in this fast-growing, competitive market—particularly as consumer demand shifts toward versatile, stylish, and functional athletic footwear.



# Unlocking Southeast Asia's running shoe market

The Southeast Asian running shoe market is expanding rapidly and brimming with potential, yet it remains fragmented in terms of competition and is evolving quickly in terms of consumer maturity. This dynamic environment offers a compelling opportunity for brands with a clear and credible value proposition.



# The rise of value-conscious runners

Brands' optimal positioning in this region lies in targeting the “pragmatic performance-seeker”—a growing segment of runners who demand genuine technical functionality but remain conscious of price-to-value ratios. This audience includes:

These consumers are not willing—or in many cases, not able—to pay the high markups of global sportswear giants, yet they also feel underserved by entry-level local or generic brands whose products may fall short in cushioning, stability, or long-distance comfort. This creates a strategic whitespace between premium international offerings and basic domestic options.

**1.** Serious amateur runners seeking improvements in race performance.

**2.** Fitness enthusiasts who are beginning to track personal bests and explore technical gear.

**3.** Young, practical consumers who are skeptical of marketing hype and focused on real-world performance.



# 5. The Rise of Value-Driven and Emotionally-Resonant Brands



# From functionality to emotional connection

In the increasingly saturated and competitive global consumer landscape, a significant shift has taken place: consumers are no longer solely motivated by functionality or status. They now seek brands that offer emotional value, cultural meaning, and a sense of personal identification. This phenomenon has catalyzed the rise of what can be termed "value-driven and emotionally-resonant brands." These are brands that not only deliver on product performance but also embody values, stories, and experiences that consumers can emotionally connect with.

A compelling example of this shift can be found on TikTok, where viral videos often expose the production reality of luxury goods—highlighting that high-end sneakers or fashion items are often assembled using components sourced from the same Chinese factories that supply budget brands. This revelation has weakened the perceived aura of luxury and empowered a new generation of savvy consumers who prioritize authentic value and emotional engagement over brand labels alone. It has further encouraged emerging brands to focus less on traditional prestige and more on cultural storytelling, ethical production, and emotional intimacy.





# Emotional resonance as the new blueprint

The foundation is:

# Technical superiority

More focus on:

# Emotionally-resonant

In a market increasingly driven by meaning and narrative, the brand must go beyond just technical superiority. While midsole technology and supply chain efficiency are foundational, they are not enough. Success depends on the ability to embed emotional storytelling, community engagement, and value-based branding into their identity. The real opportunity lies in building brands that runners don't just wear, but believe in.

The rise of emotionally-resonant branding is not a trend but a redefinition of how trust and loyalty are built. This evolution offers a blueprint for transformation: from anonymous manufacturer to meaningful cultural presence.



# Branding in the age of social platforms

Moreover, the growing importance of social platforms like TikTok, Xiaohongshu, and Instagram has transformed branding from a top-down message to a participatory, co-created experience. Consumers now expect to be part of the brand journey: not passive recipients of advertisements but active co-creators of meaning. In this context, emotional branding is no longer optional; it's essential. Brands that create emotional resonance through storytelling, shared values, and community involvement are significantly more likely to foster lasting loyalty<sup>[15]</sup>.





# Turning performance into stories

Brands can harness this emotional momentum by identifying stories deeply embedded in their identity. By elevating these narratives through athlete testimonials, behind-the-scenes R&D content, community-sourced storytelling, and educational campaigns about patented technology, they can form an emotional arc that consumers can follow and contribute to.

Further, emotional storytelling should not be treated merely as a marketing tactic, but as an embedded brand principle. For example, promoting shoes through real runner journeys—such as students training for exams, parents pursuing fitness, or first-time marathoners—can shift a brand from being merely a producer of goods to a partner in personal growth. These stories, when authentically told, generate identification, advocacy, and long-term loyalty.

As the market shifts toward meaning-driven consumption, brands that fail to offer an emotional or value-based hook risk fading into commoditization. The real opportunity lies in forging a relationship with consumers not only through price or performance—but by becoming a narrative they want to be part of.



# 6.Diverse Consumer Groups and Their Roles





# Understanding the spectrum of sneaker users

The sneaker market is no longer defined by a single type of user—it is increasingly shaped by a complex mosaic of demographic and psychographic segments, each with distinct preferences, motivations, and usage scenarios. Understanding these diverse consumer groups is essential for brands to design products and campaigns that resonate meaningfully and specifically.



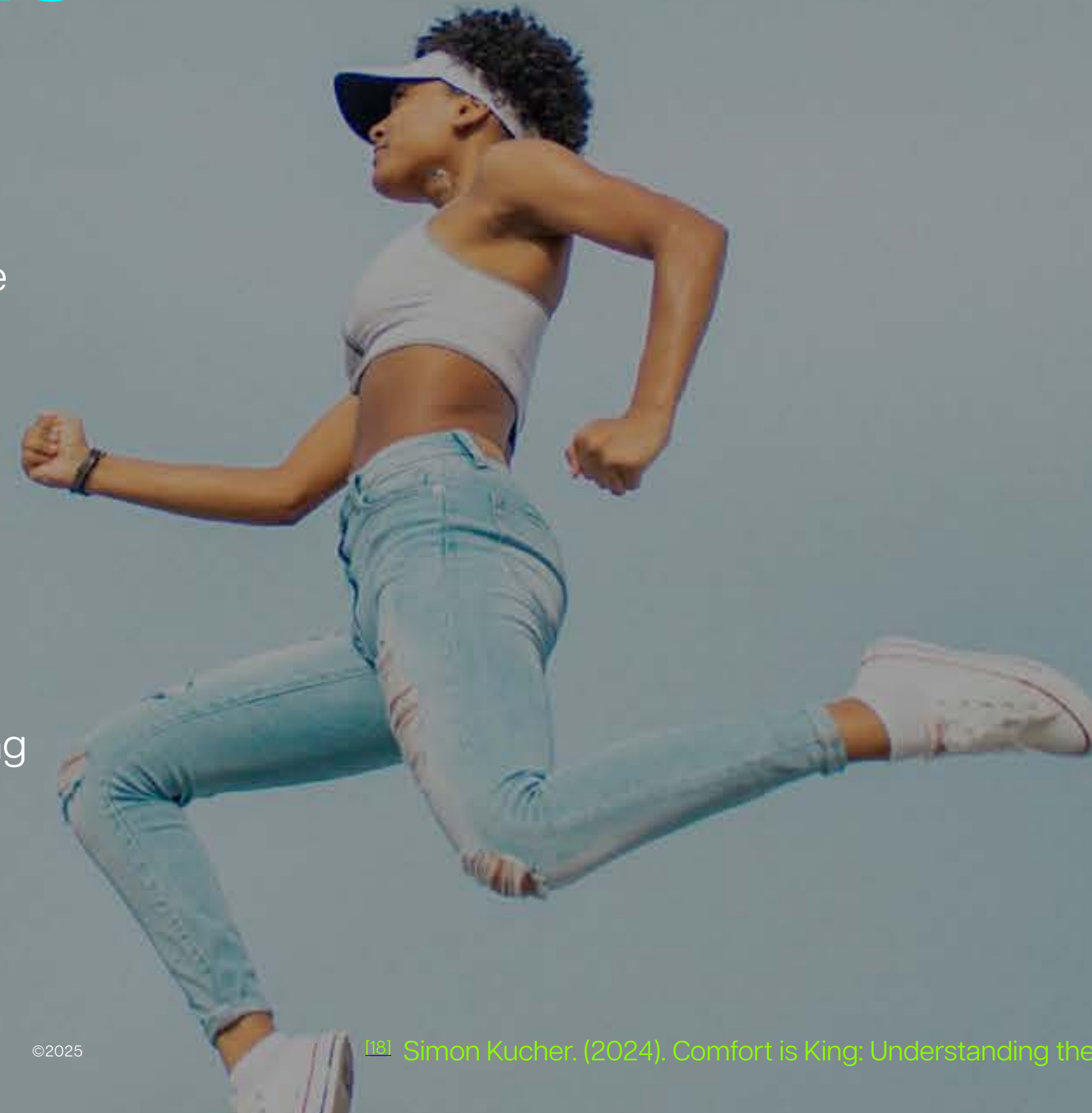
# The key consumer clusters

The analysis focuses on five key consumer clusters—Gen Z, children and teens, parents, white-collar professionals, and senior citizens—highlighting the behavioral and psychological traits that influence their sneaker choices.

## 1. Gen Z: The Value-Conscious Trendsetters

Born between 1997 and 2012, Gen Z is shaping sneaker culture more profoundly than any previous generation. As digital natives, they are accustomed to fast-paced information, online communities, and algorithm-driven discovery, yet they deeply value authenticity, transparency, and emotional storytelling. For them, a sneaker is not merely functional—it is a form of identity expression.

Behaviorally, these individuals seek products that enhance mobility, relieve stress from prolonged standing or walking, and reflect subtle personal style<sup>[18]</sup>. Brands can cater to this demographic by developing minimalist silhouettes with advanced cushioning and ergonomic features.





# The key consumer clusters

The analysis focuses on five key consumer clusters—Gen Z, children and teens, parents, white-collar professionals, and senior citizens—highlighting the behavioral and psychological traits that influence their sneaker choices.

## 2. Children and Teens: Growing Fast, Running Fast

This segment presents a two-pronged market: the users (children) and the buyers (their parents). For young runners or students preparing for national fitness exams, comfort, cushioning, and breathability are critical, while their feet are growing rapidly—often requiring a new size every few months. Parents, meanwhile, focus on durability, safety, and reasonable price<sup>[17]</sup>. Building trust with this group requires science-backed product design, anti-slip features, and affordability. Positioning the brand as a reliable companion in a child's sports and academic journey can create long-term brand loyalty from an early age.



# The key consumer clusters

The analysis focuses on five key consumer clusters—Gen Z, children and teens, parents, white-collar professionals, and senior citizens—highlighting the behavioral and psychological traits that influence their sneaker choices.

## 3. Parents: The Multi-Tasking Lifestyle Optimizers

Millennial and Gen X parents today are more involved, more informed, and more brand-savvy than ever. Many are health-conscious, balancing work, parenting, and personal fitness. They demand versatility: a sneaker must serve for daycare drop-offs, office commuting, and weekend jogging.

These consumers are also influenced by broader narratives—brands that champion environmental values, community support, or family health gain emotional traction. A comfort-first, value-focused message can appeal strongly to this group, especially if accompanied by storytelling centered on wellness and resilience.



# The key consumer clusters

The analysis focuses on five key consumer clusters—Gen Z, children and teens, parents, white-collar professionals, and senior citizens—highlighting the behavioral and psychological traits that influence their sneaker choices.

## 4. White-Collar Workers: Understated Comfort Seekers

From tech workers and teachers to retail staff and freelancers, white-collar workers increasingly rely on sneakers as part of their daily uniform. The post-pandemic “smart casual” dress code has blurred the lines between formal and functional, creating demand for footwear that is stylish yet supportive.

Behaviorally, these individuals seek products that enhance mobility, relieve stress from prolonged standing or walking, and reflect subtle personal style<sup>[18]</sup>. Brands can cater to this demographic by developing minimalist silhouettes with advanced cushioning and ergonomic features.



# The key consumer clusters

The analysis focuses on five key consumer clusters—Gen Z, children and teens, parents, white-collar professionals, and senior citizens—highlighting the behavioral and psychological traits that influence their sneaker choices.

## 5. Seniors: Mobility and Confidence Reimagined

With aging populations worldwide, especially in China, Japan, and Western Europe, the senior demographic is growing rapidly—and evolving. Today's seniors are more mobile, more tech-savvy, and more active than ever before. However, their core footwear needs remain unchanged: safety, stability, and ease of use. Behaviorally, seniors value functional credibility, health benefits, and comfort<sup>[19]</sup>. Brands can target this group with specific product lines that feature wider toe boxes, anti-slip soles, breathable materials, and easy-on/off design. Communicating through trusted health influencers or community fitness programs can strengthen trust.



# 7. Executive Summary



## Let’s take a closer look at the most critical insights from the report

By leveraging these insights and recalibrating their market approach, brands can unlock new growth opportunities and strengthen their foothold in China’s ever-evolving consumption market.

### Customer needs from functionality to emotional connections

In a market increasingly driven by meaning and narrative, the brand must go beyond just technical superiority. Success depends on the ability to embed emotional storytelling, community engagement, and value-based branding into their identity.

### Spectrum of users has been expanded

The sneaker market is no longer defined by a single type of user— it is increasingly shaped by a complex mosaic of demographic and psychographic segments, each with distinct preferences, motivations, and usage scenarios.

### The main sneaker market trends in Asia are:

In recent years, the global sneaker industry has experienced remarkable growth, driven primarily by three key trends: casualization, functionality, and sustainability.

### China’s running shoe market is in a phase of robust development,

As of 2024, the market size for running shoes in China has reached 30.7 billion RMB, with projections indicating it will exceed 50 billion RMB by 2030, maintaining a steady compound annual growth rate (CAGR) of 8–10%.

### Growth in the Chinese market is primarily driven by two key engines:

Firstly, the policy support. The recently implemented Education Power Strategy Plan (2024–2035) mandates a minimum of two hours of daily physical activity for schools

### South East sneaker market growing on a fast pace

With an annual e-commerce growth rate exceeding 100%, the sports and outdoor footwear sector in the region has already surpassed \$300 million in market size, indicating immense potential for brands that can localize and scale effectively.



# With our rich experience and deep understanding of brand development in the Asian market, we have distilled the path to success into key actionable insights:

Approach the market with a strategic mindset:

---

Ensure your brand ethos resonates with Chinese consumers.

Balance global and local perspectives:

---

Ensure your brand ethos resonates with Chinese consumers.

Remain agile:

---

Ensure your brand ethos resonates with Chinese consumers.

Implement effectively:

---

Ensure your brand ethos resonates with Chinese consumers.

Contact us for more: [enquiries@brandingrecords.com](mailto:enquiries@brandingrecords.com)



# Branding Records

Thank you.