

# China's Summer Sports Market Recap 2024





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# About our social listening analysis

We analyzed social media data to uncover new trends and evolving preferences in summer sports, identifying emerging opportunities and market dynamics in China. We sought to understand which sports people are doing, with whom, why they do them, and their preferred brands.



Over 134 million posts analyzed



Over 60 summer sports included



Over 3.4 million posts mentioning more than 90 different sporting goods brands



2.8 million posts mentioning 105 athletes from China and around the world

## Distribution of posts about summer sports by platform



**Douyin**  
50.9%

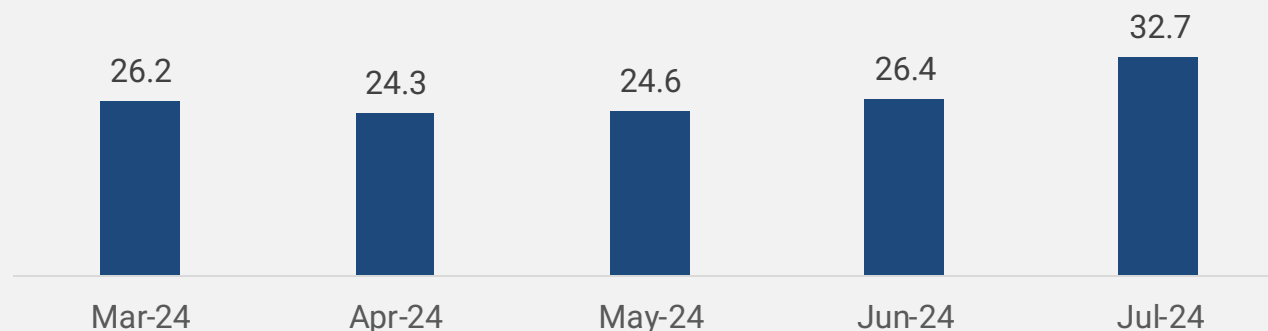


**Weibo**  
41.3%



**Xiaohongshu**  
7.7%

## March-July 2024 posts about engaging in summer sports *in million mentions*







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# The pulse of summer sports in China

# Evolving demand and government/brand support drives summer sports synergy

The sports market in China is experiencing significant growth, with the market size reaching USD 461 billion in 2022, a 6% year-over-year growth. Moreover, social media posts related to summer sports reached 134 million between March to July 2024, 34% y-o-y growth. With more government support and evolving consumer demands, there are more opportunities for brands to tap into.

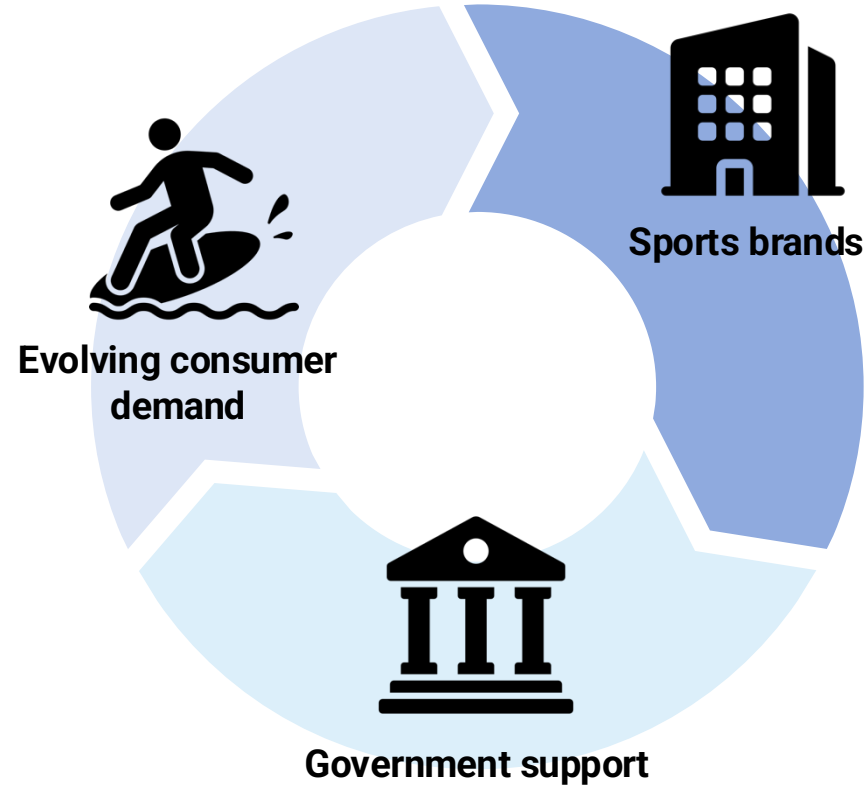
## Growing sports diversity and emerging consumer groups:

Consumers are open to exploring new sports, and interest in outdoor sports is expanding from tier-1 and tier-2 cities to lower-tier cities

Examples: 骑马 Horseback riding and 溯溪 river tracing

**Rising sophistication:** Consumer demand is becoming more refined, and there is growing expectation for multi-function, multi-purpose, and smart products

Examples: 防风 windproof, 防水 waterproof, and 速干 quick-drying sportswear



**Athlete/event sponsorships:** Brands endorse events and athletes, known for sportsmanship and wide visibility and are less prone to scandals than celebrities.

Examples: Nike sponsors Zheng Qinwen after her gold win and launched custom T-shirts, and Anta sponsored the official uniform for the Chinese team at Paris 2024

**Sports events:** Organizing activities for deeper consumer engagement and encourage brand loyalty  
Example: lululemon #夏日乐挑战 Summer Sweat Games with 10,000+ participants across 40+ cities

**Government support:** The government aims to build China into a sporting powerhouse by 2035  
Example: Hosting of international events such as the Hangzhou Asian Games in 2022 and the Chengdu FISU World University Games in 2023

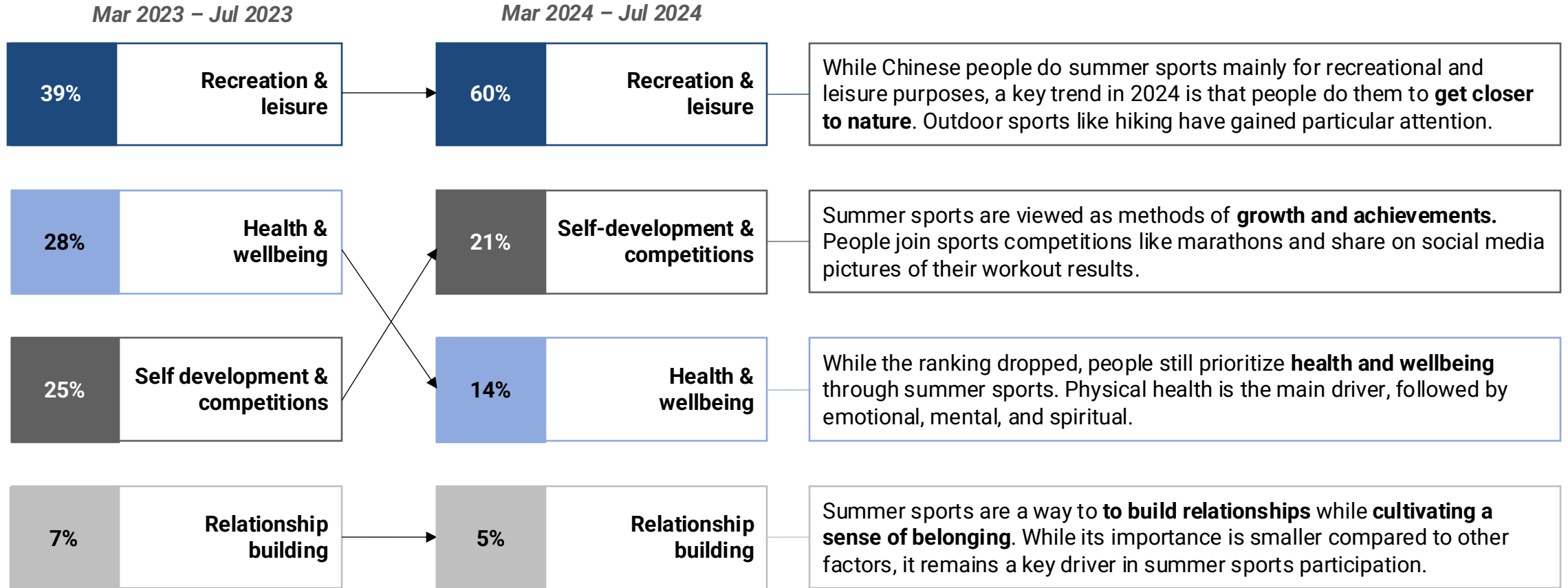
**Local governments and revitalization:** Attracting consumers to travel and do outdoor sports  
Examples: Local government contributes to Hainan becoming a surfing destination through competitions and business collaborations

Source: People's Daily Online, Global Times, WeChat, Daxue Consulting social listening analysis

# Drivers for doing sports are shifting in China

According to social listening, among 1.7 million posts on users sharing why they do summer sports, recreation and leisure is the key driving factor. This shift opens up the market to a wealth of casual athletes.

## Top motivations for summer sports participation in China and mention percentages



Data source: Daxue Consulting social listening analysis

# The focus of sports is shifting from achievement to enjoyment

Chinese people are increasingly seeking joy in sports, as reflected in the growing trend of engaging in activities with others and creating shared memories, rather than solely focusing on achieving good results.



“I DO SPORTS TO WIN”



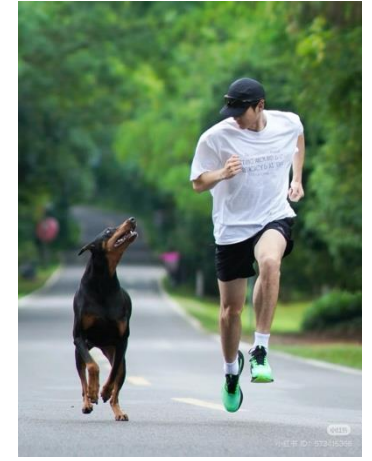
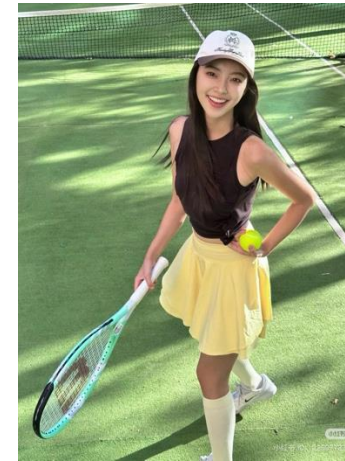
“WE DO SPORTS FOR FUN”

China has a **long-standing tradition of excelling in individual sports**. Its top Olympic-winning summer sports include badminton, swimming, and table tennis. Despite the nation's collectivist values, there is still strong emphasis on **individual achievements** and more preference for **low-contact sports**.

Among individual sports, **indoor sports have generally been more popular** than outdoor sport due to government investment in indoor sports infrastructure, along with consumer preference for controlled environments and greater accessibility to these sports.



Chinese consumers are **placing more importance on the process** rather than the results. On social media, many users share energetic, passionate, and motivated posts of them doing sports. Ways to make summer sports fresh and exciting include **doing them with others, trying new sports, and investing in new gear and clothes**.



Sources: Xiaohongshu, Chinese Academy of Social Sciences, The Economist



# Chinese consumers are redefining sports as a shared experience

Chinese social media is buzzing with people enjoying summer sports. While sports can be a personal pleasure, more people are sharing the experience with their partners, family members, friends, and even pets.

## Alone



#我的运动日常  
(#MyDailyWorkout)  
#我的徒步  
(#MyHikingDay)  
#见人不如健身  
(#WorkoutOverSocializing)  
#自律 (#Discipline)

Solo sports posts highlight **self-discipline, strength, and self-healing through nature**. Sharing these moments online fosters a **sense of community**, making solo pursuits empowering.

## Pets



#宠物活动 (#PetActivities)  
#带着宠物去户外  
(#TakeYourPetOutdoors)  
#和狗狗一起运动  
(#DoingSportsWithMyDog)  
#和狗狗一起健身  
(#WorkoutWithMyDog)

**Pets are** not just for companionship. Owners treat them **like family** and want to share with them their adventures.

## Partners



#情侣运动 (#CouplesSports)  
#情侣健身日常  
(#CouplesFitnessRoutine)  
#小情侣的日常  
(#DailyLifeOfAYoungCouple)  
#我和室友的日常  
(#DailyLifeWithMyBoyfriend)

Summer sports are becoming **a popular way for couples to bond, build trust, and create lasting memories** together.

## Family



#户外亲子运动  
(#Parent-ChildOutdoorSports)  
#亲子徒步  
(#Parent-ChildHiking)  
#亲子运动 (#Parent-childsports)  
#父子时光  
(#Father-SonMoments)

Sports have become **a way for adults to connect with their parents as well**, allowing them to relive cherished memories together.

## Friends



#一起享受大自然的美  
(#EnjoyingTheBeautyOfNatureTogether)  
#一起跑过就是我们界  
(#RunningTogetherDefinesOurWorld)  
#好肌友 (#MuscleBuddies)

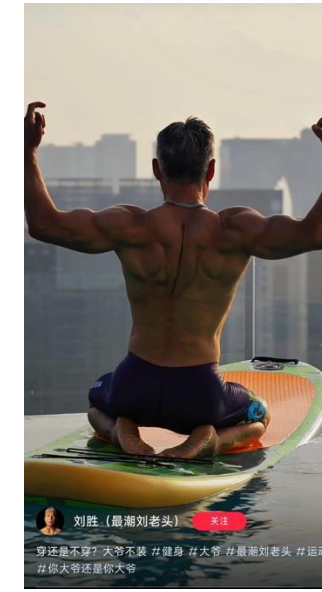
Sports are increasingly being used as **a means to forge new friendships** hence driving the demand for sports clubs.

Source: Xiaohongshu



# People over 50 years old join the sports craze

The current enthusiasm for summer sports in China isn't limited to Gen-Z. People in their 50s and older are actively participating in both outdoor and indoor sports—not just for fitness, but to enjoy time with friends, create lasting memories with their children, and maintain a youthful, attractive appearance.



Sports choices for those over 50 have evolved beyond traditional senior activities, reflecting not only a wider variety of options but also a growing eagerness to try new sports.

They usually do sports alone, with friends or with their children.

## Related hashtags:

- #父子健身 (#FatherAndSonFitness)
- #让年龄成谜 (#LetAgeBeAMystery)
- #老年运动 (#SeniorFitness)
- #带着父母去徒步 (#TakeYourParentsHiking)
- #中老年人的健康生活 (#TheHealthyLifeOfMiddleAgedAndSeniors)
- #年轻态银发 (#YouthfulSilverhair)



133K fans on XHS



138K fans on XHS

**Silver influencers** are redefining late adulthood life, **encouraging retirees to stay active** through summer sports. In so doing, they are opening up new opportunities for older generations to stay fit, social, and vibrant well into their golden years.

Source: Xiaohongshu





2

New directions in  
summer sports trends

  
daxueconsulting



# Chinese sports market diversifies with rising stars and passing fads

While not among the top 15 summer sports mentioned on social media, city walk, river tracing, rock climbing, American football/rugby, and baduanjin were among the top 15 fastest growing sports, with discussions between March and July 2024 growing by over 60% year-over-year.



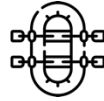











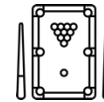
## Most discussed summer sports on social media

Mar 2024 – Jul 2024

% is y-o-y change in mentions

Since 2021, **fishing has become a popular activity among Chinese youth**. It is primarily a way to reconnect with nature and disconnect from daily stresses, as it requires patience.

The debut of **breakdancing** as an Olympic sport at Paris 2024, combined with the success of related TV shows and the hashtag #丝滑霹雳舞 (#SmoothBreakDancing) going viral on Douyin, **significantly increased hype and interest**.

	Hiking / Mountaineering	12.2% <sup>+29%</sup>		Athletics	6.4% <sup>+11%</sup>		Rafting	2.5% <sup>+43%</sup>
	Running	11.1% <sup>+19%</sup>		Swimming	4.8% <sup>-14%</sup>		Horse-riding	2.1% <sup>+41%</sup>
	Fishing	10.5% <sup>-12%</sup>		Soccer	4.6% <sup>+18%</sup>		Table tennis	2.0% <sup>+76%</sup>
	Breakdancing	9.7% <sup>+184%</sup>		Surfing	3.7% <sup>+55%</sup>		Badminton	1.8% <sup>+34%</sup>
	Basketball	7.4% <sup>+27%</sup>		Camping	3.5% <sup>-22%</sup>		Pool / Snooker	1.7% <sup>+36%</sup>

Data source: Daxue Consulting social listening analysis






# Water sports is diversifying to surfing, rafting, and snorkeling

Water sports account for 14.5% of online conversations and show significant growth potential. Chinese consumers are becoming more adventurous, increasingly favoring niche sports that require higher skill levels. As a result, the base-skill of swimming is feeding high-level activities like surfing and rafting.

## Top five most mentioned water sports on social media

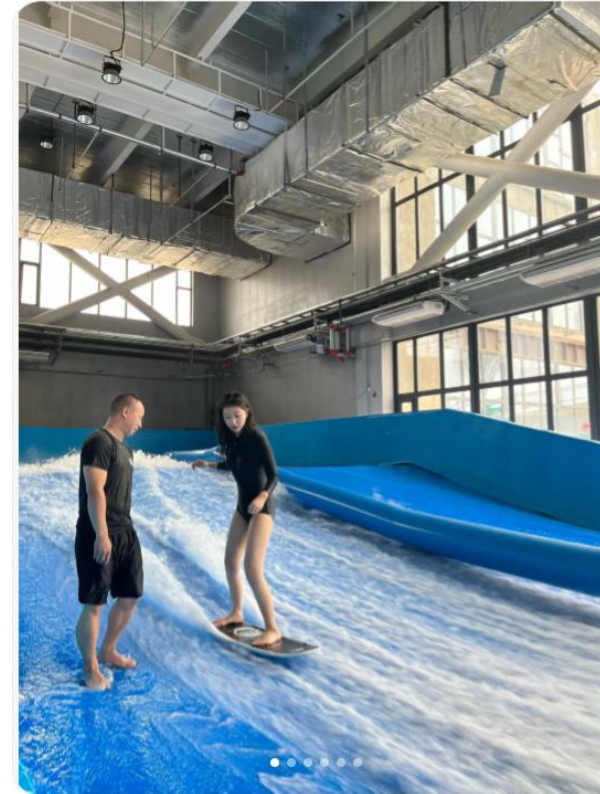
Mar 2024 – Jul 2024

% is y-o-y change in mentions

1		Swimming	-14%
2		Surfing	+55%
3		Rafting	+43%
4		Diving	+57%
5		Snorkeling/ Free-diving	+33%

Even though the number of posts about swimming on social media decreased, swimming remains **the top favorite water sport among Chinese HNWIs**, recording the highest y-o-y growth in popularity among wealthy individuals in 2024, **along with sailing**.

Data source: Daxue Consulting social listening analysis, Hurun (2024)



张开心脑袋精

关注

### Indoor surfing in Urumqi 🌊

As the farthest city from the sea, learning to surf seemed impossible. But now, with the opening of an indoor surfing center, you can add a whole new experience to your life!

No need to worry if you're a complete beginner—the coach will guide you step by step.

(...)

说点什么...

👍 470

🌟 356

💬 21



**#IndoorSurfing** (190 million views on Xiaohongshu) **offers a surfing experience to those living far from the coast**, fueling the growing surfing trend across the country.








# Pain-and-gain activities like river tracing bring people outdoors

Outdoor activities have become a must-have in Chinese consumers' travel plans. In fact, outdoor sports dominate conversations on Chinese social media, accounting for 27.1% of all sports-related posts. As people crave niche and adventurous activities, river tracing and similar outdoor experiences taking off and becoming "glamorous" sports like golf, tennis, and cycling.

## Top five outdoor sports most mentioned on Chinese social media

Mar 2024 – Jul 2024

% is y-o-y change in mentions

1		Hiking/ Mountaineering	+29%
2		Fishing	-12%
3		Camping	-22%
4		Rock climbing	+212%
5		River tracing	+217%

Despite fishing and camping experiencing in decline in mentions and negative y-o-y growth, they are not necessarily suggesting they were not sticky but rather that they **are stabilizing** from last year's boom.

The success of the docufilm Free Solo, the debut of rock climbing as an Olympic sport at Tokyo 2020, and the popularity of indoor sport climbing have all contributed to the rise of the sport in China.



能吃十碗糯米饭

关注

**Let's go river tracing and become children of nature.**

River tracing is an opportunity to connect closely with nature, allowing us to rediscover ourselves and feel the power and beauty of the natural world. In this fast-paced society, river tracing offers us a chance to relax and unwind.

(...)

说点什么...

651 88 22

River tracing is gaining popularity thanks to its **adventurous appeal** and the **stunning natural landscapes** it offers. It's a **social, group-friendly activity** that allows participants show off their physiques and latest outdoor gear, both online and offline.

Data source: Daxue Consulting social listening analysis, Hurun (2024)

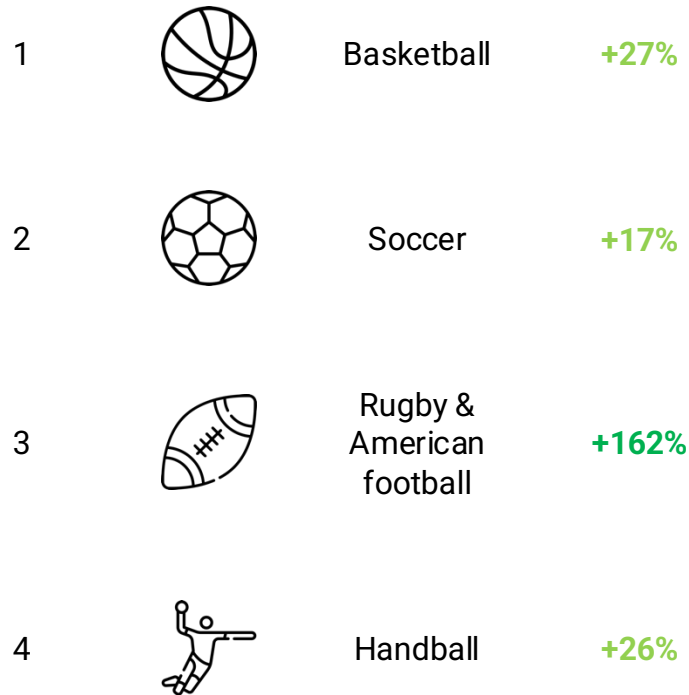
# Contact sports gradually lose stigma

Basketball remains the most practiced team ball sport in China. Meanwhile, soccer is appealing to a growing audience, and tag football is opening doors for higher contact sport American football.

## Top four most mentioned team ball sports on Chinese social media

Mar 2024 – Jul 2024

% is y-o-y change in mentions



Data source: Daxue Consulting social listening analysis



Rugby and American football are gaining traction both online and offline, especially due to the **rising popularity of tag football**—a **minimal-contact version** where participants wear Velcro tags that opponents pull to stop them. With **lower physical contact**, less emphasis on body strength, and the option for mixed-gender teams, tag football has become more popular than its traditional counterparts.

Soccer's popularity is increasing in China, with **billions of views for the 2022 FIFA World Cup** and trending discussions for the 2024 EURO Cup on Douyin.

Adding to the momentum, soccer star **Kylian Mbappé** recently launched an official account on Xiaohongshu and starred in an ad promoting the platform ahead of the 2024 Paris Olympic Games. This move highlights both the growing importance of soccer in China and Chinese fans' increasing significance in the global soccer market.



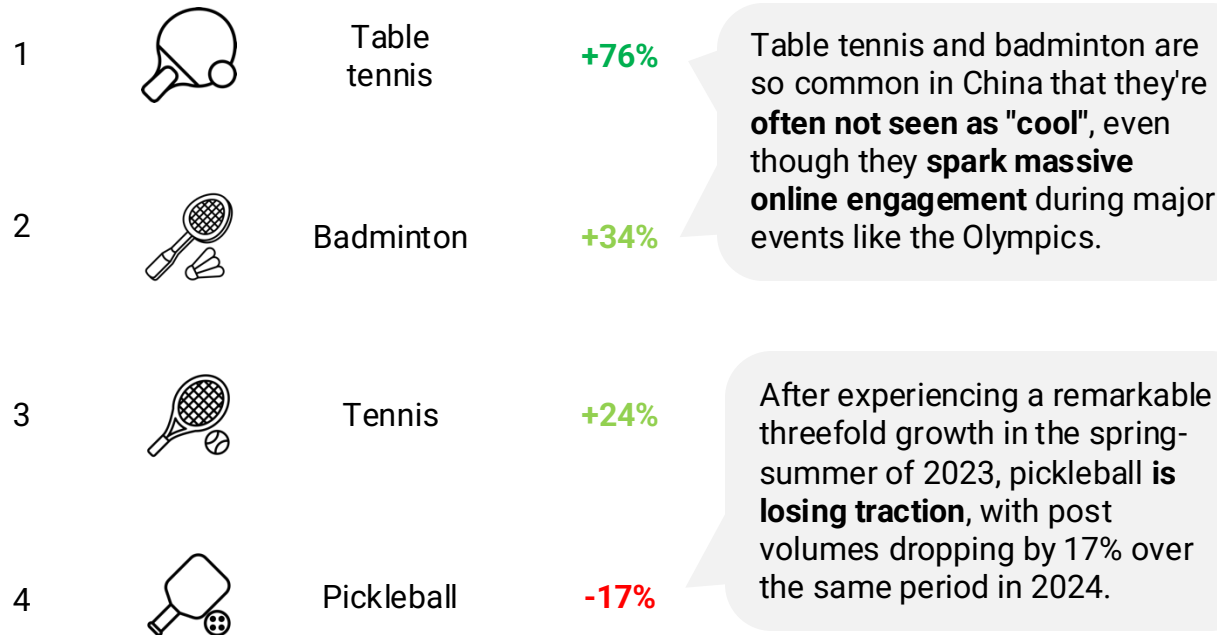
# Tennis climbs up the racquet sports ranking and imposes as a lifestyle trend

Despite the widespread popularity of table tennis and badminton, racquet sports account for only 5.7% of social media posts in China. Surprisingly, golf ranks within the top five, while tennis continues to thrive, imposing itself as a symbol of elegance and an elevated lifestyle.

## Top four most mentioned racquet sports on Chinese social media

Mar 2024 – Jul 2024

% is y-o-y change in mentions



Data source: Daxue Consulting social listening analysis

Tennis **continues to gain momentum**, merging the current fitness craze with the frenzy for vintage and old-money aesthetics, and establishing as a fashion and lifestyle trend.



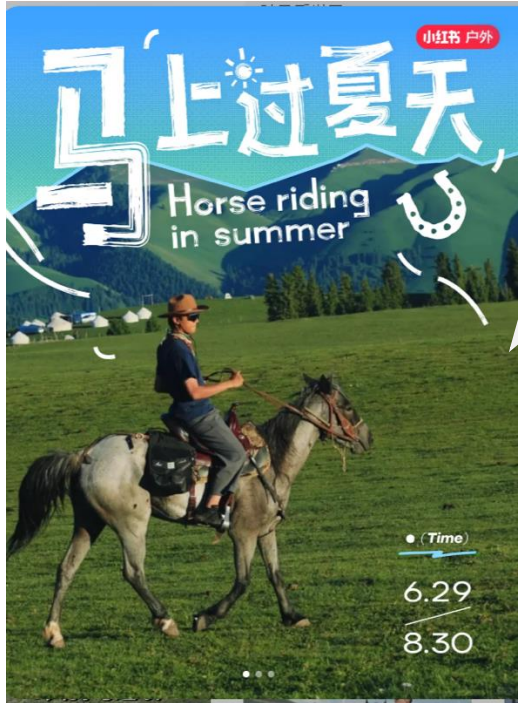
Xiaohongshu is filled with posts of users showcasing their tennis outfits, and Zheng Qinwen's gold medal victory is likely to further enhance the sport's appeal in China, as the young tennis player has garnered a remarkable success among the wider public.

#网球穿搭 (**tennis outfit**) 180M views  
#城市网球风 (**courtcore**) 58.4M views  
#courtcore 10M views  
#tenniscore 6M views



# Horse-riding rises as summer escape and elite educational investment

Driven by Douyin and KOLs, equestrian sports are booming among young Chinese urbanites, now accounting for 2.2% of summer sports conversations and nearly 50% growth. For the upper middle class, horseback riding is not just a trend but an educational investment that builds character and offers advantages for overseas university admissions.



During summer 2024, Xiaohongshu rode the wave of the rising horseback riding trend by **launching two promotional campaigns encouraging users to share their summer horseback riding experiences**, offering prize incentives. The official hashtags of the campaigns, #骑马看世界 (#ExploreTheWorldOnHorseack) and #马上过夏天 (#SummerOnHorseback) gained 32.5 million and 36.7 million views, respectively.

However, horse riding has evolved beyond just a holiday activity. In recent years, equestrian clubs have **emerged in tier-1 cities**, bringing this experience from the grasslands to urban settings. While less popular than tenniscore, **equestrian fashion is becoming a trend**. It align perfectly with the old-money style and other popular fashion trends.

Images source: Xiaohongshu

## AMBITIOUS PARENTS ENROLL THEIR CHILDREN IN HORSEBACK RIDING CLASSES

- Since the implementation of the "double reduction" policy, sports training has been on the rise, with specific sports such as fencing and equestrianism attracting significant attention due to their **status as bonus points for studying abroad**.
- Horseback riding possesses **fashionable and social attributes**, making them particularly favored by women.
- People **enhance their demeanor** and **refine their personalities** through learning sports such as fencing and equestrianism.



### Horseback riding first experience for 2-year-olds | Beijing family activity

Do you have a 2-year-old who loves horses? Today's surprise was a horseback riding lesson! Although there was some initial nervousness when they first got on the horse, as soon as they sat down, the kid straightened his back and was instantly filled with joy!

(...)

This horseback riding experience not only let the children enjoy the fun of riding, but also taught them courage, confidence, and independence.



# Table tennis athletes dominated discussions during the Summer Olympics

Athletes frequently mentioned on social media often become top brand ambassadors for both global and local companies. However, their commercial value isn't just tied to online buzz—it depends more on how they can be used to build compelling narratives around their image.

## Most discussed athletes on social media

% of posts about athletes among those doing sports from Mar to Jul 2024

## BRANDS THEY ENDORSE IN CHINA

Her success and youthful energy make her an attractive choice for brands aiming to connect with younger consumers and promote a **dynamic brand identity**.

Although Pan Zhanle hasn't received widespread mention from sports enthusiasts, his appeal has sparked a **substantial and devoted fan base**.

	Sun Yingsha	21.7%	Hisense, Coca-Cola, Yili, PLCO4VR, China Post, Vanward, Yibao, Junlebao, Kang Shifu, Li Ning, P&G, Master Kong, Junlebao, C'estbon and Tide.
	Wang Chuqin	18.5%	Coca-Cola, Yili, Keihl's, pico4, Li Ning, Panasonic Air Conditioning, Baxy, P&G
	Quan Hongchan	8.2%	Coca-Cola, Blue Moon, Yili, Wahaha
	Chen Meng	5.1%	Hisense, Li Ning and Dior
	Ma Long	4.9%	Prada, ERDOS, Omega, L'Oréal, Shuanghu, AUX, Nanfu Battery, KONO, Audi, Biotherm, Visa, Coca-Cola, Lion King, Mc Donald's, Li Ning
	Sheng Lihao	4.7%	N/A
	Fan Zhendong	3.6%	Rimowa, jellycat, Anta, Yili
	Pan Zhanle	2.7%	Mentholatum, Trip.com, Nongfu, GERM, ZEEKR, AUPU

The number of endorsements does not necessarily correlate with an athlete's popularity at a given time; instead, it is **more closely linked to their underlying commercial value**.

Data source: Daxue Consulting social listening analysis, news outlets, brands' announcements

# Popular Chinese athletes are favored by local and international brands

It is strategic for brands to choose athletes over celebrities for endorsements due to their positive image and reliability. Athletes' appeal and alignment with brand values help boost visibility through unboxing videos, social media endorsements, and public appearances.

## REASONS WHY POPULAR ATHLETES WERE CHOSEN



### Positive image and higher reliability

- In recent years, popular athletes are preferred by Chinese brands for their **lower risk of scandal as compared to celebrities**
- They embody positive attributes that are aligned with the brands' or nation's positive image
- Example: Ctrip uses athlete endorsements to promote Chinese domestic tourism

### Brand alignment

- Companies look for athletes whose personal brand aligns with the company's values and image
- **Athletes who are young, perform well, and have international appeal** generally generate significant buzz during tournament period, thus bringing positive publicity to the brand they endorse
- Example: CHAGEE collaborates with Zheng Qinwen to enhance her international presence and reinforce their health-focused brand image



## COMMON COLLABORATION MODEL OTHER THAN ADS



### Unboxing videos

- Athletes showcase the unboxing process or contents of their bags
- The point is to **integrate the brand's products to enhance authenticity and reliability**

### Endorsement videos

- Athletes create videos offering blessings or endorsements of new products and upload on their personal social media accounts
- This collaboration method **leverage athletes' personal influence to expand the brand's reach**



### Brand event appearances

- Champions attend brand events or new branch openings
- Directly associate their public image with the brand to **boost exposure and impact**

Sources: Ctrip, Chagee, Xiaohongshu



3

The summer sports  
effect on other  
industries

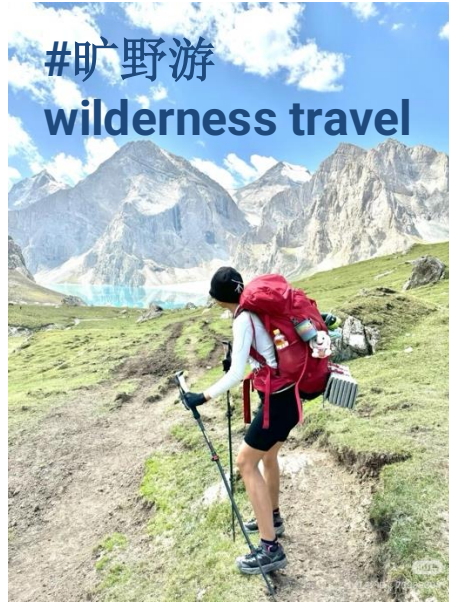
  
daxueconsulting



# Tourism: Chinese travelers spice up their trips with outdoor adventures

Just a few years ago, sports were primarily a daily routine. However, Chinese people are increasingly incorporating sports in their travel plans.

On social media, Chinese travelers **share their outdoor sports and travel experiences**. On XHS, @芋泥奶奶 shares her 15-day journey to Zhangjiajie Forest Park.



## FACTORS DRIVING "SPORTS & TRAVEL" IN CHINA



**Novelty**

Chinese consumers are seeking **fresh and exciting experiences**. They want to try activities in less controlled environments.



**Challenge**

They **seek mental and physical challenge** through new activities, especially those living in cities or living more monotonous lives.



**Value**

They want to **maximize value for their money** (新价比), especially on experiences that enrich their lives, help them relax, and satisfy their curiosity.



**Nature**

There is a growing desire to **connect with nature** through full sensory immersion. With the most UNESCO geoparks in the world, China has drawn many Chinese tourists to these sites.



*In August, the evenings in Zhangjiajie often bring light rain, and the waterproof nature of my jacket was very nice, allowing me to **fully enjoy the outdoors!***

Sources: Xiaohongshu, CNR Culture Media Co., Ltd.



# Skincare: Outdoor sports change beauty standards with acceptance of tan skin

Traditional Chinese beauty standards favor pale skin. However, modern standards are embracing more tan skin, creating the need for beauty brands to develop products like foundation and sunscreen for darker skin tones.

While many Chinese people **still prefer having fair skin** and wear sunscreen, facekinis, parasols, and even long sleeves to protect themselves from the sun, more people are becoming **accepting of darker skin tones**.

勇气 *courage*    健康 *healthy*    更加自由  
*liberating*

美黑 *beautifully tanned*

酷 *cool*

小小自恋一下  
*a little bit of self admiration*



## Three years of living by the sea

The sun has become my friend, gifting me a tanned complexion. My family often says, "Girls shouldn't get this dark; it's not pretty, and no one likes it." But I enjoy it, and I think it **looks great**.

Impact on the beauty industry:

- **Need for beauty products catered to darker skin tones** such as tinted sunscreen, more inclusive foundation shades, self-tanning products
- **Need to position marketing messages to appeal to consumers seeking a tanned look**, through strategies like emphasizing the benefits of achieving a tanned appearance without sun damage and collaborating with influencers with tan skin, such as @黑珍珠 Dani and @Hey ~ Mia

Sources: Weibo, Xiaohongshu, iiMedia Research

# Fashion: Athleisure is the new streetwear

As sports become cool, they evolve into a fashion sensation, pervading various contexts and inspiring diverse styles and combinations. Meanwhile, fast-fashion brands have joined the sports craze by integrating high-performance technology into everyday outfits.

The surge in sports enthusiasm is fueling new fashion trends that **blend seamlessly with popular styles** like cleanfit, new vintage, dopamine dressing, and old money, creating **unique hybrids that resonate across various contexts**.

**Casualwear brands** like Uniqlo and Muji have embraced the sporty style trend by **launching performance-driven** clothing lines such as AIRism, Sport Utility Wear, and Muji Labo. These collections feature quick-dry technology, sweat-proof fabrics, and materials that help regulate temperature and allow the skin to breathe.



The Muji Labo Summer 2024 collection features key attributes such as **breathability, waterproofing, and UV protection**, ensuring comfort and functionality for warm-weather activities.

**#athflow**  
(athleisure + elegance)

**#urbancore**  
**#都市运动风**

**#山系户外风**  
(yamastyle)



Uniqlo's AIRism line offers main features such as a **cool-to-the-touch feel, breathability, a soft and smooth texture that's gentle on the skin, and moisture-wicking with quick-drying capabilities**.



Sources: Muji, Uniqlo

**#sportychic**

**#blokecore**  
**#混搭球衣风**

**#gorpcore**

# Luxury: Consumers shift luxury spending to sporting goods

After recording a 12% year-over-year rise in 2023, China's personal luxury goods market faces new pressures from the economic slowdown, increased overseas purchases, and a growing preference for experiential luxury over traditional displays of wealth. In this context, high-end sports-related products turn into a new symbol of social status and sophistication.

**During 2024H1, the world's top two luxury groups recorded a slowdown in revenue due to deceleration in Asia-Pacific**



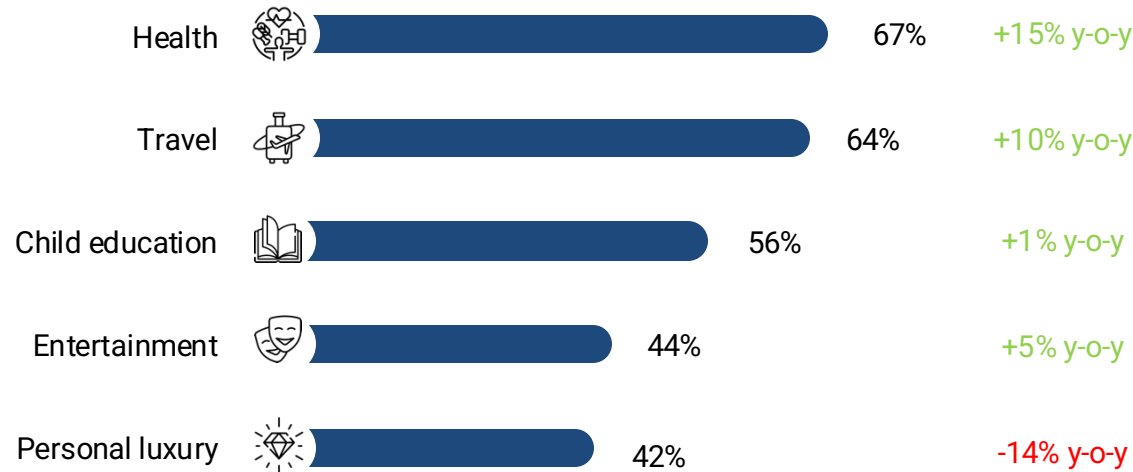
**-11%**  
(Gucci -19%)



**+2%**  
(Asia, excl. Japan sales -10%)

**Which categories of consumer goods will you increase spending on in the next year?**

(2024, N=750 HNWIs with at least RMB 10 million in assets)



Data source: Bain (2024), Kering, LVMH, Hurun (2024), Xiaohongshu

In the last few years, high-end sports brands **have started opening stores in upscale malls**, alongside luxury brands.



For example, Arc'teryx has **stores in prestigious locations**, such as Plaza 66 and iAPM in Shanghai, SKP in Beijing, and Taikoo Hui Mall in Guangzhou, among others.



As luxury consumption shifts towards experiences, brands dive into sports fashion and accessories to **deliver a well-rounded luxury experience**.





**4**

**Heavy hitters and  
rising stars**

  
**daxueconsulting**



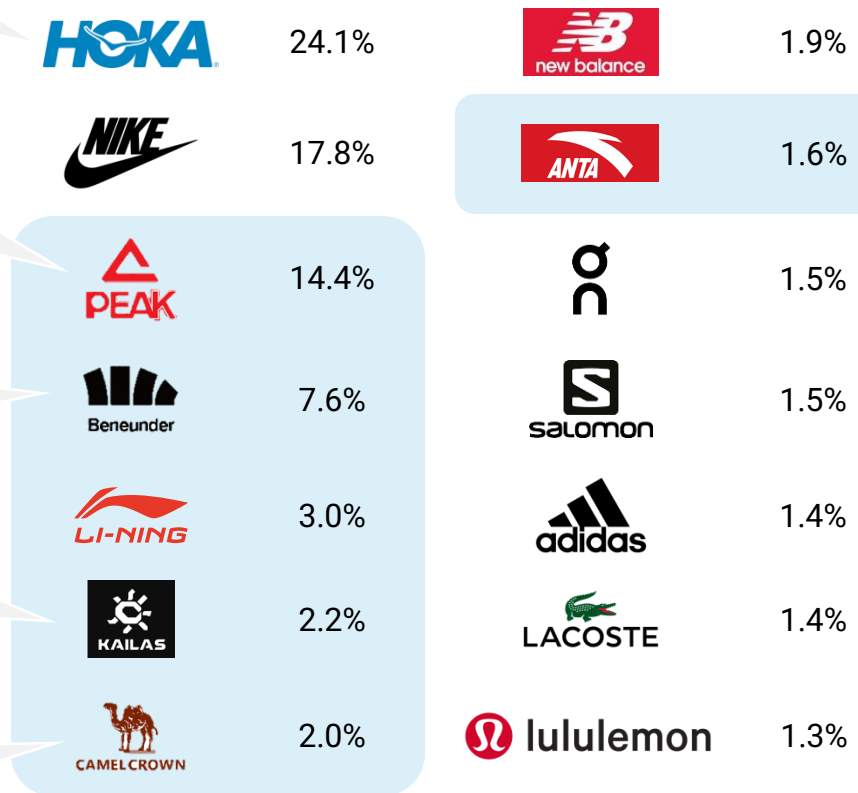
# Chinese consumers shift focus to domestic and niche sports brands

Five of the top seven brands are homegrown, showcasing the rise of Chinese brands. Furthermore, niche brands are also gaining traction, giving traditional players a run for their money, with Salomon and Kailas appearing within the top 14. Meanwhile, Helly Hansen, Beneunder, Lacoste, Hoka, Peak, Kailas, Salomon, Asics, and Arc'teryx recorded the most impressive year-over-year growth.

Top 14 most mentioned sports brands by people who posted about summer sports on Chinese social media

Mar 2024 – Jul 2024

■ Domestic brands



In July 2024, Hoka's **online mentions skyrocketed**, driven by significant buzz around its campaign featuring actor **Li Xian (李现)**, driving it to number one.

Peak, a **Guochao** brand rising from the ashes, invested heavily in **rebranding** and new product design, and **sponsored the Brazilian and Serbian teams** during Paris 2024.

The enthusiasm for outdoor activities has boosted the visibility of Beneunder, specialized in **sun protection** clothes and accessories.

The brand sponsors professional trail runners and has recently opened **pop-up stores** in Shanghai and Shenzhen, achieving impressive reach.

**Celebrity endorsements** are a key feature of this homegrown outdoor brand, renowned for its hiking jackets.

**Nostalgia** in fashion has sparked interest in New Balance models like the 2002R and 327. Their shoes are also known for their **comfort and support**, making them especially suitable for long walks.

During the analyzed period, social media engagement with sporty individuals mentioning **Adidas stagnated**. Moreover, the brand's marketing team is facing serious allegations of embezzlement and bribery.

Lacoste's online visibility peaked in March 2024 after appointing **Wang Yibo as its global ambassador**, aiming to attract a younger audience. Traditionally linked with tennis and golf, the brand also launched a breakdancing campaign to further boost its appeal to youth.

Data source: Daxue Consulting social listening analysis

# Nike is bringing back its competitive edge but results remain uncertain

In fiscal 2024, Nike's Greater China unaudited revenue was USD 7.5 billion, an 8% year-over-year revenue growth excluding currency changes. However, its leadership position in China faces intense pressure with the rise of domestic giants like Anta China and Li-Ning, whose revenue were USD 8.8 billion and USD 3.9 billion, respectively in 2023, and niche brands like Hoka and On.

## NIKE HAS BEEN LOSING ITS SWOOSH

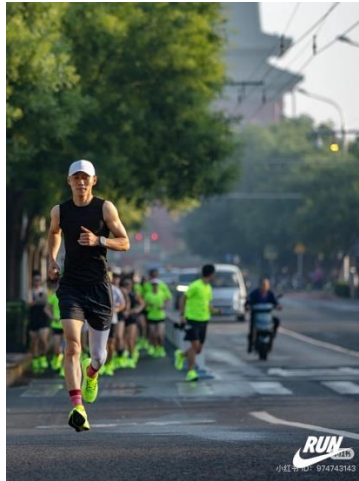
**Underinvestment in grassroots marketing:** Nike's expansion from footwear towards lifestyle products have opened doors for brands like Hoka and On, who target niche markets and build strong community relationships.

**Perceived low value for money (性价比):** The products of local sports brands are **perceived to be of comparable**, if not superior, quality to Nike's. They are also viewed as **more affordable**, appealing to Chinese consumers, who make rational choices.

**Reputational risks:** Nike has been involved in issues like the Xinjiang Cotton incidence and its Paris Summer Olympics ad, where it didn't sit well with Chinese consumers. Meanwhile, local competitors benefit from their homegrown status and **leverage Guochao (国潮)**.

## NIKE RETURNS TO ITS ROOTS

**Product innovation:** Nike is investing into creating superior products that inspire "new technologies, new systems, and new standards". It built Nike Digital Technology Center in Shenzhen in 2021 and announced plans in 2023 to establish its Nike Sport Research Lab in Shanghai.



**Seamless omnichannel interactions:** Nike entered **social commerce** in 2024 in China by launching live broadcasts on Douyin. It also **held various offline events**, including community city runs and Spring Festival themed Nike by You workshops.



**Hyper-localization:** In March 2024, it opened Jordan World of Flight in Beijing, the fourth in the world. The store **incorporates local architectural elements** like 京砖 (gold bricks), which are the same flooring material used in the Forbidden City, and art installations dedicated to Jordan Brand history to **resonate with the local basketball community**. It also offers **exclusive products** like the Wings Collection and **customizable** hands-on service for making one-and-only Jordan products.

Sources: Weibo, Nike, Inc., ANTA SPORTS, Li Ning (China) Sports Goods Co., Ltd

# HOKA'S success in China: focused product strategy and community engagement

HOKA is a French sportswear brand known for their year-round professional outdoor and running shoes. Founded by two athletes who wanted to design shoes better suited for downhill running in 2009, HOKA entered China in 2017 and has since gained recognition from many professional athletes and outdoor enthusiasts.

## HOKA'S KEY SUCCESS FACTORS IN CHINA: PRODUCT INNOVATION + COMMUNITY ENGAGEMENT + RETAIL EXPERIENCE



### Product design and innovation:

Instead of diversifying into other product categories, HOKA **focuses on its outdoor and running shoes**. It offers shoes tailored to specific usage scenarios, such as marathons and cross-country running, and ensures they are **light and extra comfortable**.

### Community engagement:

HOKA focuses on building a relationship with its community to encourage running and foster brand loyalty. In 2024, it hosted the HOKA Fly Run Carnival in Yucun, Anji, where nearly 1,000 outdoor enthusiasts across China gathered.

### Retail expansion and experiential spaces:

HOKA is **expanding its physical stores** while also selling partnering with third-party retailers. Its stores **go beyond traditional retail**, providing spaces for activities like product testing on treadmills, attending local talks on nutrition, and learning about running.



# Outopia: a premium Chinese trail running brand bidding for global fame

Founded in Shanghai in 2021 by Aaron Jackson and Alexis Hou, Outopia has become synonymous with high-quality sports gear among trail runners in China. With shirt prices ranging from RMB 450 to 990, the brand positions itself as a premium sportswear label. Outopia plans to expand internationally in the coming years.



Outopia combines merino wool with synthetic fibers to create innovative, high-quality trail running gear. With a team of dedicated trail runners, they understand the sport's demands, leading to designs like the WindFlyer 2.0, which features a sleeve opening for easy smartwatch access. Their products also incorporate advanced technologies like Nuyard and Lincspun for superior performance.



The sportswear brand builds its reputation by teaming up with pro trail runners in top competitions worldwide.

Moreover, they are hosting their own events, open to both amateurs and pros, fostering a community of like-minded enthusiasts around its name.

Sources: Taobao, Xiaohongshu

# Salomon: A middle-class icon in today's sports fashion

Part of the Amer Sports Group, the French skiing and hiking brand Salomon has gone urban, becoming a must-have for gorpcore and yama-style enthusiasts. Like its sister brand Arc'teryx, Salomon targets mid-to-upper-market consumers who are willing to pay extra for premium sportswear. Their shoes are renowned for being comfortable and functional, while also offering versatility and style.

## Focus on DTC channels

Salomon has rapidly expanded its offline stores, growing **from 13 in 2019 to 139** by September 2024. Like Arc'teryx and Lululemon, Salomon is opening stores in high-end malls such as Kerry Center in Shanghai and Mixc in Chongqing.



Image sources: Salomon, Xiaohongshu, Esquire, Dewu



## Most popular Salomon shoes in China (Sept 2023)



XA PRO



XT QUEST



XT-6

Salomon shoes have gained international attention through high-profile collaborations with luxury brands and celebrity endorsements. **Rihanna** took the spotlight at the 2023 Super Bowl Halftime Show wearing the MM6 Maison Margiela x Salomon Cross Low, putting the brand on the fashion radar.

Chinese celebrities, like actor and singer **Wei Daxun**, are also sporting Salomon shoes, showcasing their broad appeal and growing influence in the fashion world.





**5**

**Hypotheses on the  
future of summer  
sports in China**

  
**daxueconsulting**



# Hypotheses on the future of the summer sports market in China

1. **Enthusiasm for outdoor sports and reconnecting with nature will drive demand for niche and natural travel destinations. Domestically, this will also boost development of rural areas blessed with natural beauty, which are abundant in China.**
2. **With parents shifting their focus from mere academic success to holistic development, there will be a rising interest in sports promoting teamwork, leadership, and confidence, and accomplishments in sports could start to be valued more by society and schools.**
3. **As Chinese premium sportswear brands invest in quality and performance innovation, they are well-poised for global recognition and will increasingly look to the global market.**
4. **Athleisure is taking up more space in fashion, and in order for fashion brands to compete in streetwear, office wear, and other areas, they will have to improve the comfort and breathability, even if their products are not designed for sports.**
5. **Outdoor sports and athleticism being associated with status will shift beauty standards from preferring pale and blond to accepting more tan and toned physiques. In turn, the beauty and fashion industry will have to keep up with these changes or risk being seen as old school.**
6. **As consumer segments diversify, brands will focus more on engaging with sports communities, known for their strong brand loyalty. It will become more important to not only foster social and emotional engagement but also demonstrate rational value by proving the brand's products superior quality.**



**ABOUT**

  
**daxueconsulting**

# Daxue Consulting in 6 characteristics

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- 1** A China-origin growth-centric advisory firm helping companies uncover hidden opportunities in East Asia
- 2** 700 projects since 2012, 60% from returning clients
- 3** Research-intensive strategy consulting
- 4** 40+ strong globally-educated multi-cultural team with local understanding of each target country
- 5** 50,000+ mentions of our work on the internet
- 6** We are creatively analytical and analytically creative



# Our mission

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**Our mission is to help companies uncover and harness hidden opportunities in uncharted territory**

Through our market research and strategy consulting, we equip businesses with the knowledge and guidance to achieve growth in East Asia



# What we do

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## STRATEGIC RESEARCH

- ✓ Pricing
- ✓ Competitive Benchmarking
- ✓ Sensory (Taste & Test)
- ✓ Consumer Understanding
- ✓ Market Sizing
- ✓ Trends Report
- ✓ Brand Audit

## BRANDING & STRATEGY

- ✓ Naming
- ✓ Brand Book
- ✓ Brand Positioning
- ✓ Brand Activation
- ✓ Toolkit
- ✓ Co-branding Strategy
- ✓ China Messaging Strategy Localization

## SALES & DISTRIBUTION

- ✓ Route-to-market
- ✓ Distribution Mapping
- ✓ Brand Activation
- ✓ Toolkit
- ✓ Retail Safari
- ✓ Channels Strategy

## MANAGEMENT CONSULTING

- ✓ Market Entry Strategy
- ✓ Business Plan
- ✓ Learning Expedition
- ✓ PMO
- ✓ Growth Models
- ✓ Prospective And Foresight
- ✓ Product / Market Fit



# Our values

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## **Freedom enriches creativity & responsibility**

*Freedom to manage and envision her or his mission increases the sense of responsibility to that mission.*

## **Our clients' goals are our goals**

*We see ourselves as an extension of our clients' business in China or their target country, hence, we advise them as if we were in their shoes and investing along with them.*

## **Embrace change enthusiastically**

*Similar to how markets are constantly changing, our mindset is also always evolving. We value routine only when it helps us improve and we value change because it helps to keep pace with the times.*

## **Intellectual humility gives clarity**

*Only through the lenses of humility can knowledge be seen clearly. At Daxue Consulting, we are humble toward science and the truth. We interpret data in a way that lets it speak for itself, even if contradicts our hypothesis.*

## **Knowledge is meant to be shared**

*While our projects team dives deep to provide catered research to clients, the media team shares insights publicly. At the same time, we foster a culture of sharing knowledge in our team, each individual works to increase their own knowledge and freely share ideas with each other.*

# 400+ clients since 2012

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EN PROVENCE

Elizabeth Arden  
NEW YORK

Kiehl's

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LAUDER  
COMPANIES

P&G

SHANGRI-LA  
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SANDRO

The Coca-Cola Company

ROSEWOOD  
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paris

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ANDROS

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