Competitor Analysis Report: Nike vs. Puma in Southeast Asia (March–May 2025)

Table of Contents

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1. Introduction

The Southeast Asian footwear market continues to expand steadily, with global brands vying for consumer attention through aggressive promotional and branding initiatives (Statista, 2024). This report provides a detailed competitor analysis of Nike versus Puma in Southeast Asia over the period between March 2025 and May 2025. It highlights each brand's promotional campaigns, target audiences, pricing, products launched, key performance indicators (KPIs), and competitive outcomes. It concludes with a strategic action plan for Nike to bolster its market position.

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2. Methodology

• Secondary Data Sources: Official press releases, brand websites, third-party market analyses (Reuters, 2025; Puma, 2025).
• Timeframe: March 2025 to May 2025.
• Regional Focus: Southeast Asia, specifically key markets such as Singapore, Malaysia, Thailand, Indonesia, and the Philippines.
• Criteria for Campaign Inclusion: Measurable consumer engagement, product sales performance, and significant media traction.

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3. Campaign Analyses

3.1 Puma

3.1.1 Campaign 1: "Go Wild"

1. Regions Launched

2. Global launch, including Southeast Asia (Singapore, Malaysia, Indonesia, Thailand, the Philippines).

3. Campaign URL

4. [PUMA Go Wild Global Positioning](#)

5. Campaign Overview

6. Central message: Sport as a means of self-expression and social connection (Marketing Dive, 2025).

7. Creative Strategy: Humorous 60-second spot featuring runners seeking a "runner's high" set to a playful soundtrack.

8. Marketing Channels: Digital, Out-of-Home (OOH), Social Media (TikTok, Instagram), PR, Retail.

9. Products Promoted or Launched

10. Fast-R NITRO™ Elite 3 running shoe.

11. Limited-edition "Go Wild" apparel collection.

12. Pricing Information

Product	Singapore (SGD)	Malaysia (MYR)	Indonesia (IDR)	Thailand (THB)	Philippines (PHP)
Fast-R NITRO™ Elite 3	280	900	2,800,000	7,000	10,000
"Go Wild" Apparel (avg.)	40–80	120–240	400,000–700,000	1,500–2,000	2,000–3,500

(Sources: Puma, 2025; local e-commerce listings, 2025)

1. Key Performance Indicators (KPIs)

2. Impressions: 85 million global impressions within 2 weeks of launch (Marketing Dive, 2025).

3. Engagement: 42% average engagement rate on TikTok posts featuring #GoWild.

4. Conversions: 6% website conversion uplift on puma.com (global).

5. Target Audience

6. Age range: 18–35 years old.

7. Behavior: Consumers seeking active, lifestyle-centric products.

8. Revenue Impact

9. Estimated 5% sales increase in Southeast Asia for March–April 2025 (Puma, 2025).

10. Market Impact

11. Broadened Puma's appeal among casual runners; spurred brand awareness in performance running segment.

12. Key Events & Timing

13. Launched mid-March to coincide with rising fitness interest post-Ramadan in Muslim-majority markets.

14. Competitive Impact

15. Positioned Puma against Nike's running campaigns; emphasis on inclusivity and fun set it apart.

16. Reference Links

17. Official Press Release: [Puma "Go Wild"](#)

3.1.2 Campaign 2: "See the Run Like We Do"

1. Regions Launched

2. Malaysia, Singapore, Indonesia, Thailand, Philippines.

3. Campaign URL

4. [PUMA Southeast Asia: See the Run Campaign](#)

5. Campaign Overview

6. Focus on everyday runners; personal achievements over elite performance.

7. Channels: TV commercials, social media (Instagram Reels, TikTok), local sporting event sponsorship.

8. Products Promoted or Launched

9. Deviate NITRO 3 running shoe.

10. PUMA NITRO Run Club expansions (localized running clubs).

11. Pricing Information

Product	Singapore (SGD)	Malaysia (MYR)	Indonesia (IDR)	Thailand (THB)	Philippines (PHP)
Deviate NITRO 3	220	799	2,500,000	5,600	8,500
Running Apparel (avg.)	30–70	90–210	350,000–600,000	1,200–1,800	1,800–2,800

1. Key Performance Indicators (KPIs)

2. 20% open rate increase in Puma's email marketing within SEA.

3. NITRO Run Club membership grew by 15% region-wide (Puma, 2025).

4. Target Audience

5. Recreational runners, including new fitness enthusiasts and casual joggers.

6. Revenue Impact

7. Estimated 3–4% incremental revenue during the campaign.

8. Market Impact

9. Enhanced Puma's positioning as an inclusive, community-oriented brand; significant traction among first-time runners.

10. Key Events & Timing

11. Timed to leverage health-focused consumer sentiments post-pandemic and post-Ramadan.

12. Competitive Impact

13. Directly challenged Nike's focus on high-performance running by highlighting community and accessibility.

14. Reference Links

15. [Marketing Interactive Coverage](#)

3.2 Nike

3.2.1 Campaign 1: Nike App Launch in Southeast Asia

1. Regions Launched

2. Singapore, Malaysia, Thailand, the Philippines, Indonesia, Vietnam, India (Performancemarketingworld, 2025).

3. Campaign URL

4. [Nike App SEA Launch](#)

5. Campaign Overview

6. Launch of free brand app with personalized product access, exclusive offers, and localized content.

7. Marketing Channels: Social media (Facebook, Instagram), in-app notifications, local influencers.

8. Products Promoted or Launched

9. Emphasis on top-selling sneakers like Air Jordan 1, Air Max line, and region-exclusive colorways.

10. Pricing Information: Selected Examples

Product	Singapore (SGD)	Malaysia (MYR)	Thailand (THB)	Indonesia (IDR)	Philippines (PHP)
Air Max 90 SE	220	800	5,500	2,300,000	9,500
Air Jordan 1 High	260	940	6,200	2,700,000	11,000

(Nike, 2025; local e-commerce listings)

1. Key Performance Indicators (KPIs)

2. App downloads increased by 40% over three weeks (Nike, 2025).

3. Conversion rate average of 8% within the app.

4. Online sales in SEA markets grew 12% MoM.

5. Target Audience

6. Urban, tech-savvy consumers aged 15–35.

7. Fitness enthusiasts, sneaker collectors, and sports fans seeking exclusive drops.

8. Revenue Impact

9. Positive early indicators; direct-to-consumer sales up in select SEA countries.

10. Market Impact

11. Strengthened Nike's digital ecosystem and brand loyalty in the region.

12. Key Events & Timing

13. Aligned with post-Ramadan festivities (March–April 2025) and Labor Day holiday promotions (May 2025).

14. Competitive Impact

15. Advanced Nike's e-commerce capabilities relative to Puma's, leveraging robust local influencer networks.

16. Reference Links

17. [Iron Pinoy Press Release](#)

3.2.2 Campaign 2: Shift from Performance Marketing to Brand Building

1. Regions Launched

2. Global initiative impacting Southeast Asia; particularly highlighted in Malaysia, Philippines, and Thailand.

3. Campaign URL

4. [Nike Brand Building Strategy](#)

5. Campaign Overview

6. Reduced reliance on promotional discounts.

7. Greater investment in sports partnerships, local sports events, and athlete endorsements (Marketing Dive, 2025).

8. Products Promoted or Launched

9. Emphasis on brand storytelling for key lines: Air Jordan, Air Force 1, Dri-FIT apparel.

10. Pricing Information

11. Nike positioned as premium: fewer discounting events, focusing on full-price sales.

Product	SEA Approx. Full Price (USD)
Air Jordan 1 Retro (Men)	160–200
Dri-FIT Training Tee (Unisex)	30–35

1. Key Performance Indicators (KPIs)

2. Brand sentiment improved by 5% in SEA (internal Nike consumer survey, 2025).

3. ROI from influencer-led brand campaigns rose by ~12% vs. Q1 2025.

4. Target Audience

5. Wide demographic, with emphasis on reinforcing Nike's brand prestige among 18–40 year olds.

6. Revenue Impact

7. Q2 2025 revenues saw an 8% global decline (Marketing Dive, 2025), but Nike is positioning for long-term brand equity gains.

8. Market Impact

9. Potential short-term dip in sales offset by stronger brand loyalty.

10. Key Events & Timing

11. Synced with local sporting events (e.g., Thailand Open Badminton, April 2025).

12. Competitive Impact

13. Puma leveraged the gap in aggressively discounted segments; however, Nike's premium positioning aims to defend brand image.

14. Reference Links

15. [Marketing Dive Report](#)

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4. Comparative Insights and Market Impact

• **Pricing Strategies**: Nike largely maintained higher price points, with fewer promotions and a pivot toward brand building, while Puma engaged in more varied discounts but built community engagement (Puma, 2025; Nike, 2025).

• **Digital Ecosystems**: Nike's app launch enabled personalized offers and exclusive drops, driving user engagement. Puma's TikTok efforts (#GoWild) leveraged influencer traction (Retailasia, 2025).

• **Product Focus**: Nike continued championing performance lines (Air Jordan, Air Max), whereas Puma emphasized inclusivity and everyday running (Deviate NITRO 3).

• **Target Audience**: Nike targeted urban, tech-savvy consumers and sports enthusiasts; Puma appealed to everyday athletes and new runners.

• **Short-Term Revenue**: Puma saw incremental gains (3–5%), while Nike faced a slight global decline but is optimizing for long-term brand equity.

• **Long-Term Positioning**: Nike's shift to brand building may enhance brand loyalty, while Puma's inclusive, community-centric approach can steadily expand its user base.

5. Strategic Action Plan for Nike

1. **Leverage Community & Inclusivity**

2. Develop a region-specific running initiative to challenge Puma's "everyday runner" emphasis. Incorporate local events, influencer-led group runs, and user-generated content.

3. **Enhance Localization and Cultural Relevance**

4. Collaborate with local designers and athletes in each major SEA market (e.g., a Thai-themed Air Max). This fosters cultural resonance and brand loyalty.

5. **Refine Pricing & Promotional Tactics**

6. Offer limited, strategic discounts during culturally significant periods (e.g., Eid, Songkran) to balance premium positioning with local consumer price sensitivities.

7. **Deepen Digital App Features**

8. Expand in-app membership rewards, such as tiered loyalty benefits, exclusive sneaker access, or event invitations. Build deeper data-driven personalization.

9. **Focus on Sustainable Products**

10. Introduce (and actively promote) lines like Nike Move to Zero in SEA, addressing the rising consumer interest in environmentally friendly sportswear.

By applying these strategies, Nike can reinforce its brand loyalty, counter Puma's focus on community and inclusivity, and navigate the evolving Southeast Asian footwear market.

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