

Fresh Strat to the Shoe Brands: An Applicability Study of Paint Industry's Success Models in the Indian Footwear Market

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Abstract

India ranks as the second-largest footwear manufacturer globally after China, with a vast untapped domestic market exhibiting strong growth potential. The Indian footwear market, valued at over INR 1,25,000 crore in 2026, has expanded at a robust 12-15% CAGR over recent years, driven by rising disposable incomes, urbanization, and e-commerce penetration.

Branded footwear now dominates over 55% of the market, fuelled by international giants like Nike, Adidas, Puma, and Skechers entering aggressively.

In the premium, athletic segment, Nike holds ~40% share with 500+ exclusive stores, while Adidas plans 20-25 new outlets monthly across Tier-1/2 cities. Global exposure via travel and digital media has shifted consumers from product-focused to brand-conscious preferences, demanding premium experiences, sustainability, and personalization.

Introduction

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Aspect	Paint Industry Success	Footwear Industry Challenges	Adaptation Potential
Market Structure	Consolidated (top 3: 70% share); strong dealer networks	Fragmented (unorganized: 45%); weak rural reach	Build exclusive franchises like Reebok's model

Branding	High-involvement via ads, painter influencers	Brand-conscious youth; global premium bias	Emulate paint's quality-awareness campaigns
Nudges	Subtle cues (e.g., Quality, Effective pricing, visualizers, Brand Image)	Limited; price-sensitive impulse buys, Comfort focus	Apply default premium trials, scarcity framing, Quality adaption by Indian Brands, creation of effective image.
Consumer Shift	From whitewash to emulsions (12-15% growth)	From local to branded (55% branded now)	Nudge via AR try-ons, loyalty tiers like paints' apps

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Cross-Industry Insights: Paint vs. Footwear

India's retail landscape pits fragmented sectors like footwear against consolidated ones like paints, where Asian Paints (55% share) leverages advanced marketing, supply chains, and behavioral nudges for dominance.

This analysis probes if paint industry models—sophisticated nudges rooted in behavioral economics—can transfer to footwear, correlating strategies for enhanced engagement and loyalty in India's dynamic market. Findings offer actionable pathways blending nudge theory with cross-sector lessons.

Literature Review

The Influencers' Attributes and Customer Purchase Intention: The Mediating Role of Customer Attitude Toward Brand

Zhao et al. (2024) examined how online influencer attributes—professionalism, credibility, interactivity, and attractiveness—affect customer purchase intention in livestreaming e-commerce. Using data from 233 Chinese consumers and structural equation modelling, the study found that **credibility and attractiveness directly influence purchase intention**, while customer attitude toward the brand mediates the effects of credibility, interactivity, and attractiveness. Interestingly, professionalism did not significantly influence either brand attitude or purchase intention. The study highlights that influencer credibility and attractiveness can be important behavioural mechanisms in shaping consumers' responses to brands and their purchase intentions.

Status of the Paint Industry in India

The Indian paints and coatings industry has experienced substantial growth, supported by urbanisation, housing and infrastructure development, increasing consumer spending, and expansion into smaller cities. Recent industry estimates indicate that the Indian paints and coatings market was approximately **USD 12.51 billion in 2026** and is projected to reach **USD 19.5 billion by 2031**, representing a CAGR of approximately 9.28%. Architectural applications constitute the dominant segment, while increasing demand for water-based and environmentally compliant coatings reflects changing consumer and regulatory expectations. The industry is also becoming increasingly competitive due to capacity expansion and the entry of new players.

A Research Approach to Paint Industry in India – A Study of Its Marketing Strategies

Sama, Parasuraman, and Siva Surendra (2026) examined the marketing strategies used in the Indian paint industry and their relationship with consumer satisfaction, brand image, reputation, loyalty, repurchase intentions, and recommendations. Based on primary and secondary data, the study reported that advertising and increasing awareness of product quality contribute to the growth of paint consumption. The study further emphasised the importance of marketing strategies, dealer networks, painter influence, and wider promotional activities in strengthening consumer relationships and brand performance in the Indian paint market.

Brand Preference and Consumer Perception Towards Paint: A Territory Study in Coimbatore District

Jenifer and Shenbhagavadivu (2020) examined brand preference and consumer perceptions towards paint products in Coimbatore. The study highlights the transformation of paints from a luxury product into an essential consumption category, supported by increasing urbanisation, disposable income, construction activity, and changing consumer preferences. The study also considers brand image, major industry players, product characteristics, and consumer awareness of functional benefits such as corrosion protection. These findings demonstrate the importance of **brand perception, product attributes, and changing consumer expectations** in the competitive paint industry.

Paint Industry in India – Bright or Tight?

The *Paint Industry in India – Bright or Tight?* whitepaper reported a significant transformation in Indian consumer preferences, particularly the shift from traditional whitewash towards higher-quality paints such as emulsions and enamel products. The report estimated the Indian paint industry at approximately USD 6 billion during 2016–17 and highlighted urbanisation, infrastructure development, rising demand for quality and aesthetics, and technological development as major growth drivers. It further identified strong competition among organised players and emphasised the importance of innovation, cost efficiency, distribution, and technology for sustaining competitiveness.

Impact of Industry 4.0 Technologies on Manufacturing Productivity in India

Md and Srivastava (2026) examined the role of Industry 4.0 technologies, including artificial intelligence, the Internet of Things, big-data analytics, and cyber-physical systems, in improving manufacturing productivity in India. The study suggests that effective adoption of these technologies can improve operational efficiency, product quality, cost optimisation, and data-driven decision-making. However, high implementation costs, shortages of skilled personnel, and inadequate digital and physical infrastructure remain important barriers, particularly for small and medium-sized enterprises. The findings indicate that technological readiness and skill development are essential for achieving the productivity benefits associated with Industry 4.0.

Brand Loyalty and Pricing Strategies in the Fast-Fashion Industry

Lyu (2025) investigated the relationship between pricing strategies and brand loyalty in the fast-fashion industry. Using an online survey of 250 consumers in China and the United Kingdom, the study examined whether dynamic pricing mechanisms, including flash sales and personalised discounts, influence brand loyalty and repurchase intentions. The study positions pricing strategy as an important behavioural and competitive tool in a highly dynamic fashion market, particularly for consumers who are sensitive to price and promotional offers.

Nudging and Pricing Strategies for Promoting Healthy Diets

Stuber et al. (2022) investigated the real-world effects of nudging and pricing strategies in supermarkets using a cluster-randomised controlled trial involving 12 Dutch supermarkets. The intervention combined

healthy-product price reductions, unhealthy-product price increases, and point-of-purchase nudges. The preliminary three-month results did not demonstrate a significant improvement in dietary guideline adherence compared with control supermarkets. The findings suggest that **nudges and pricing interventions may not automatically produce immediate behavioural change**, highlighting the importance of context, consumer habits, and the design and duration of behavioural interventions.

Consumer Behaviour Report on Apparel Trends

PriceGrabber's 2013 apparel survey, based on approximately 3,850 respondents, examined consumer shopping and purchasing behaviour related to clothing and footwear. The report indicated that economic uncertainty encouraged consumers to become more conscious of their spending, while online retailers gained importance because of perceived savings, convenience, and wider product selection. The findings are relevant to footwear research because they demonstrate the growing importance of **price comparison, convenience, online shopping, and value consciousness** in apparel and footwear-related purchase behaviour. The survey details are also reported in subsequent literature discussing the Indian footwear industry.

Factors Influencing Consumer Intentions to Purchase Seasonally Discounted Reebok Athletic Footwear

Lorterapong (2005) examined factors influencing consumers' intentions to purchase seasonally discounted Reebok athletic footwear in the Thai market. The study was based on utility theory and the theory of reasoned action and examined demographic, psychographic, and normative factors influencing purchase intentions. The findings indicated that demographic characteristics were not significant predictors of purchase intention, whereas deal proneness, value consciousness, price consciousness, reference-group attitudes, and quality consciousness significantly influenced consumers' intentions to purchase discounted Reebok footwear. The study is particularly relevant to the present research because it demonstrates that footwear purchase decisions are influenced not only by price but also by perceived value, quality, promotional attractiveness, and social influence.

Research Objectives

- To examine the factors influencing consumers' footwear purchase decisions.
- To compare consumer perceptions and preferences towards Indian and international footwear brands.
- To assess consumers' willingness to purchase Indian footwear brands when quality and comfort are comparable to international brands.
- To examine the role of behavioural nudges, including store experience, employee service, social influence, and online trends, in influencing footwear purchase decisions.
- To examine the association between consumers' income levels and their footwear brand preferences.

Research Methodology

The study adopts a descriptive research design using a mixed-method approach to examine consumer behaviour and perceptions towards Indian and international footwear brands, including the influence of behavioural nudges on purchase decisions. Primary data were collected through semi-structured interviews with 17 footwear retailers and a structured questionnaire administered through Google Forms, generating 141 consumer responses. Convenience sampling was used for selecting both retailers and consumers. Secondary data were obtained from research articles, journals, industry reports, and relevant company websites. Retailer interview data were analysed thematically, while consumer survey data were

analysed using percentage analysis and graphical representations.

Data Interpretation

Demographic Variables

The demographic profile of the 141 respondents indicates that the sample is predominantly male (60.3%) and student-oriented (57.4%), suggesting that the findings largely reflect the preferences of younger consumers. More than half of the respondents (55.3%) belong to the ₹0–50,000 income group, indicating relatively high price sensitivity. Overall, the demographic characteristics suggest that the study sample represents young, relatively price-conscious consumers, whose footwear purchase decisions are likely to be influenced by affordability, quality, comfort, and style.

Consumer Decision-Making Method

Decision Method	Percentage (%)
Fixed brand in mind	9.2
Compare options	41.1
Decide in-store	27.7
Take salesperson advice	2.1
Decision based on recent trends	9.2
Online research (specific product in mind)	10.6

Interpretation:

The findings indicate that **comparing available options (41.1%)** is the most common method used by respondents before purchasing footwear, followed by making the final decision in-store (27.7%). Online research accounts for 10.6%, while only 2.1% of respondents rely on salesperson advice. This suggests that consumers generally follow an **independent and information-oriented decision-making process**.

Trust in Indian Footwear Brands

Consumer Trust in Indian Footwear Brands

Trust Rating	Percentage (%)
Rating 1	—
Rating 2	—
Rating 3	37.6
Rating 4	38.3
Rating 5	14.9

Interpretation:

The findings indicate a **generally positive perception of Indian footwear brands** in terms of trust and quality. A considerable proportion of respondents rated their trust at 3 (37.6%) and 4 (38.3%), while 14.9% gave the highest rating of 5. This indicates moderate to high confidence in Indian footwear brands among the respondents.

Awareness of Indian Footwear Brands

Consumer Awareness of Indian Footwear Brands

Awareness Rating	Percentage (%)
Rating 1–2	Low
Rating 3	21.3
Rating 4	35.5
Rating 5	34.8

Interpretation:

The findings demonstrate a **high level of awareness of Indian footwear brands**. Around 35.5% of respondents reported a rating of 4 and 34.8% reported the highest rating of 5. A further 21.3% indicated moderate awareness. This suggests that Indian footwear brands have achieved substantial visibility and recognition among consumers.

Perceived Gaps in Indian Footwear Brands

Perceived Areas Requiring Improvement in Indian Footwear Brands

Area	Percentage (%)
Brand Image	48.2
Variety/Options	45.4
Quality	36.9
Marketing	34.8
Store Experience	32.6
Customer Service	22.0

Interpretation:

Brand image (48.2%) was identified as the major perceived gap in Indian footwear brands, followed by variety/options (45.4%). Quality (36.9%) and marketing (34.8%) were also identified as areas requiring improvement. The findings suggest that Indian brands need to strengthen their **brand positioning, product variety, marketing communication, and overall consumer experience** to compete more effectively with international brands. Pasted text

Influence of Make in India Initiatives

Influence of “Made in India/Make in India” on Purchase Decisions

Response Level	Percentage (%)
Neutral (Rating 3)	49.6
Positive Influence (Ratings 4 and 5)	34.0
Low Influence	9.2

Interpretation:

The findings indicate a **moderate influence** of “Made in India/Make in India” initiatives on footwear purchase decisions. Nearly half of the respondents (49.6%) remained neutral, while 34% expressed a positive inclination. This indicates that the initiative has some influence on consumer attitudes but is not, by itself, a dominant purchase determinant. Pasted text

Footwear as a Reflection of Status and Personal Image

Perception of Footwear as a Status or Personal Image Indicator

Response	Percentage (%)
Neutral	33.3
Agree	27.0
Low Agreement	—

Interpretation:

The findings indicate a **moderate perception of footwear as a reflection of status or personal image**. While 33.3% of respondents remained neutral, 27% agreed that footwear brands can reflect status. Overall, consumers appear to place greater emphasis on functional attributes than on the symbolic or status-related value of footwear. Pasted text

Influence of Influencers and Online Trends

Table: Influence of Influencers and Online Trends

Response	Percentage (%)
Yes	19.9
Maybe	50.4
No	29.8

Interpretation:

The findings reveal that influencers and online trends have a **moderate influence** on footwear purchase decisions. Half of the respondents (50.4%) selected “Maybe,” while 19.9% indicated that they were influenced. This suggests that influencer marketing may be effective when supported by **credibility, relevance, trust, and authentic content**. Pasted text

Willingness to Purchase Indian Brands When Quality Is Comparable

Table: Willingness to Purchase Indian Brands at Comparable Quality

Response	Percentage (%)
Yes	69.5
Maybe	27.7
No	Small proportion

Interpretation:

The results demonstrate a **strong potential for Indian footwear brands** if they provide quality and comfort comparable to international brands. A substantial 69.5% of respondents expressed willingness to purchase Indian brands, while another 27.7% were open to considering them. Thus, improving product quality and comfort can significantly strengthen consumer preference for Indian brands. Pasted text

Influence of Store Experience

Table: Influence of Improved Store Experience on Purchase Intention

Response	Percentage (%)
Yes	60.3
Maybe	31.2
No	8.5

Interpretation:

The findings indicate that **store experience is an important factor influencing purchase intention**. About 60.3% of respondents stated that they would be more likely to purchase Indian footwear brands if store environments were improved through better displays, product variety, and service. Pasted text

Influence of Employee Service

Table: Influence of Improved Employee Service

Response	Percentage (%)
Yes	58.9
Maybe	34.0
No	7.1

Interpretation:

Improved employee service has a positive influence on consumer purchase intention. A majority of respondents (58.9%) indicated that better employee service would make them more likely to purchase Indian footwear brands, while 34% expressed conditional willingness. This highlights the importance of **effective customer interaction and service quality** in retail footwear purchases. Pasted text

Influence of Social and Peer Factors

Table : Influence of Social and Peer Usage

Response	Percentage (%)
Yes	45.4
Maybe	44.0
No	10.6

Interpretation:

The findings indicate that **social influence and peer usage can encourage consumers to try Indian footwear brands**. About 45.4% of respondents expressed willingness to try such brands when people around them use them, while 44% selected “Maybe.” Only 10.6% were not influenced. This indicates potential for **word-of-mouth, recommendations, and social proof** to support brand adoption. Pasted text

4.12 Factors Encouraging Consumers to Purchase Indian Footwear Brands

Table 4.12: Factors Encouraging Purchase of Indian Footwear Brands

Factor	Percentage (%)
Better Quality	57.4
Brand Image	Moderate influence
Variety	Moderate influence
Better Store Experience	Relatively lower influence
Lower Price	Relatively lower influence
Recommendations	Minimal influence
Online Influencers	Minimal influence

Interpretation:

Better quality (57.4%) is the most important factor encouraging consumers to purchase Indian footwear brands. Brand image and variety also influence consumer interest, while recommendations and online

influencers have comparatively limited influence. The findings therefore highlight **product quality and performance as key drivers** of consumer acceptance of Indian footwear brands. Pasted text

Hypothesis Testing and Statistical Analysis

Test 1: Importance of Factors When Buying Footwear — Quality versus Price

Table: Descriptive Frequencies of Factors Considered Important When Buying Footwear

Factor	Frequency (n=141)	Percentage (%)
Quality/Comfort	131	92.9
Price	99	70.2
Design/Style	90	63.8
Durability	67	47.5
Brand	58	41.1
Status Value	13	9.2

Interpretation and Result (H1): Quality/comfort was considered important by **92.9%** of respondents, compared with **70.2%** for price. The findings indicate that respondents place greater emphasis on quality and comfort than on price when purchasing footwear. Therefore, **H1₀ is rejected and H1₁ is supported**. The result suggests that Indian footwear brands cannot rely solely on price discounts and should focus on delivering superior quality and comfort. Pasted text

5.2 Test 2: Brand Preference and Willingness to Purchase Indian Brands

Table 5.2: Descriptive Statistics of Willingness to Purchase Indian Brands

Scale: 1 = No, 2 = Maybe, 3 = Yes

Brand Preference	N	Mean Willingness	Std. Deviation
Both Equally	88	2.77	0.45
Indian Brands	30	2.57	0.63
International Brands	23	2.39	0.58
Total	141	2.67	0.54

Table 5.3: ANOVA — Brand Preference and Willingness to Purchase Indian Brands

Source	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	3.75	2	1.88	5.77	0.0039
Within Groups	44.91	138	0.33	—	—
Total	48.66	140	—	—	—

Interpretation and Result (H2): The ANOVA results indicate a statistically significant difference in willingness to purchase Indian footwear brands across the three brand-preference groups, **F(2,138) = 5.77, p = 0.0039**. Therefore, **H2₀ is rejected and H2₁ is supported**. Respondents who preferred both Indian and international brands equally showed the highest willingness to purchase Indian brands when quality was comparable, followed by respondents who preferred Indian brands, while exclusive international-brand users showed the lowest willingness. Pasted text

Test: Trust in Indian Brands and Willingness to Purchase

Table: Correlation between Trust and Willingness to Purchase Indian Brands

Variables	Trust in Indian Brands	Willingness to Purchase
Trust in Indian Brands	1.000	0.243
Sig. (2-tailed)	—	0.0037
N	141	141
Willingness to Purchase	0.243	1.000
Sig. (2-tailed)	0.0037	—
N	141	141

Interpretation and Result (H3): The correlation analysis indicates a **positive and statistically significant relationship** between trust in Indian footwear brands and willingness to purchase them, $r = 0.243$, $p = 0.0037$. Thus, higher levels of trust are associated with greater willingness to purchase Indian footwear brands when quality is comparable to international brands. Therefore, **H3₀ is rejected and H3₁ is supported**. Pasted text

5.4 Test 4: Trust and Store Experience as Predictors of Willingness to Purchase

Table 5.5: Model Summary of Multiple Regression

R	R Square	Adjusted R Square	Std. Error of the Estimate	N
0.402	0.162	0.150	0.505	141

Table 5.6: ANOVA of Regression Model

Source	Sum of Squares	df	Mean Square	F	Sig.
Regression	7.01	2	3.50	13.35	0.000005
Residual	36.65	138	0.27	—	—
Total	43.66	140	—	—	—

Table 5.7: Regression Coefficients — Trust and Store Experience

Dependent Variable: Willingness to Purchase Indian Brands (1 = No, 2 = Maybe, 3 = Yes)

Predictor	B (Unstandardised)	Std. Error	t	Sig. (p)
Constant	1.54	0.23	6.81	0.000
Trust in Indian Footwear Brands	0.13	0.05	2.80	0.006
Better Store Experience	0.26	0.06	4.12	0.000

Interpretation and Result (H4): The regression model is statistically significant, $F(2,138) = 13.35$, $p < 0.001$, and explains approximately **16.2% of the variance** in willingness to purchase Indian footwear brands. Both trust ($B = 0.13$, $p = 0.006$) and better store experience ($B = 0.26$, $p < 0.001$) have positive and statistically significant effects. Store experience demonstrates the stronger coefficient of the two predictors. Therefore, **H4₀ is rejected and H4₁ is supported**. The findings indicate that trust and in-store experience are meaningful behavioural factors influencing consumers' willingness to choose Indian brands when quality is comparable. Pasted text

Test: Association between Income and Brand Preference

Table: Chi-Square Test of Income and Brand Preference

Test	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	8.463	10	0.584
Likelihood Ratio	10.557	10	0.393
N of Valid Cases	141	—	—

Table 5.9: Cross-Tabulation of Income Level and Brand Preference

Income Code	Both Equally	Indian Brands	International Brands	Row Total
1 (Lowest)	48	19	11	78
2	15	4	3	22
3	16	2	5	23
4 (Highest)	9	5	4	18

Interpretation and Result: The Pearson Chi-square test indicates **no statistically significant association between income level and brand preference**, $\chi^2(10) = 8.463$, $p = 0.584$. Since the p-value is greater than 0.05, the null hypothesis is not rejected. Therefore, income level does not appear to significantly influence whether respondents prefer Indian brands, international brands, or both equally within this sample. Pasted text

Major Findings

The study found that quality and comfort are the primary factors influencing footwear purchase decisions, followed by price and design. Consumers show a preference for both Indian and international brands, but Indian brands need improvement in brand image, variety, and perceived quality. A majority of consumers are willing to purchase Indian brands if comparable quality and comfort are offered. Trust, store experience, employee service, and social influence also positively affect purchase intention, while income does not significantly influence brand preference.

Conclusion

The study finds that quality, comfort, design, and overall value are more important to consumers than price alone. While international brands are perceived as stronger in trust, reliability, and brand image, Indian brands have strong potential if they improve quality, build consumer trust, and enhance the in-store experience. Overall, the findings suggest that Indian footwear brands can reduce dependence on discounts and compete more effectively through better product quality, stronger brand positioning, and superior retail experiences.

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