catchpoint

2025

Athletic Footwear and Apparel Digital Experience

Benchmark Report

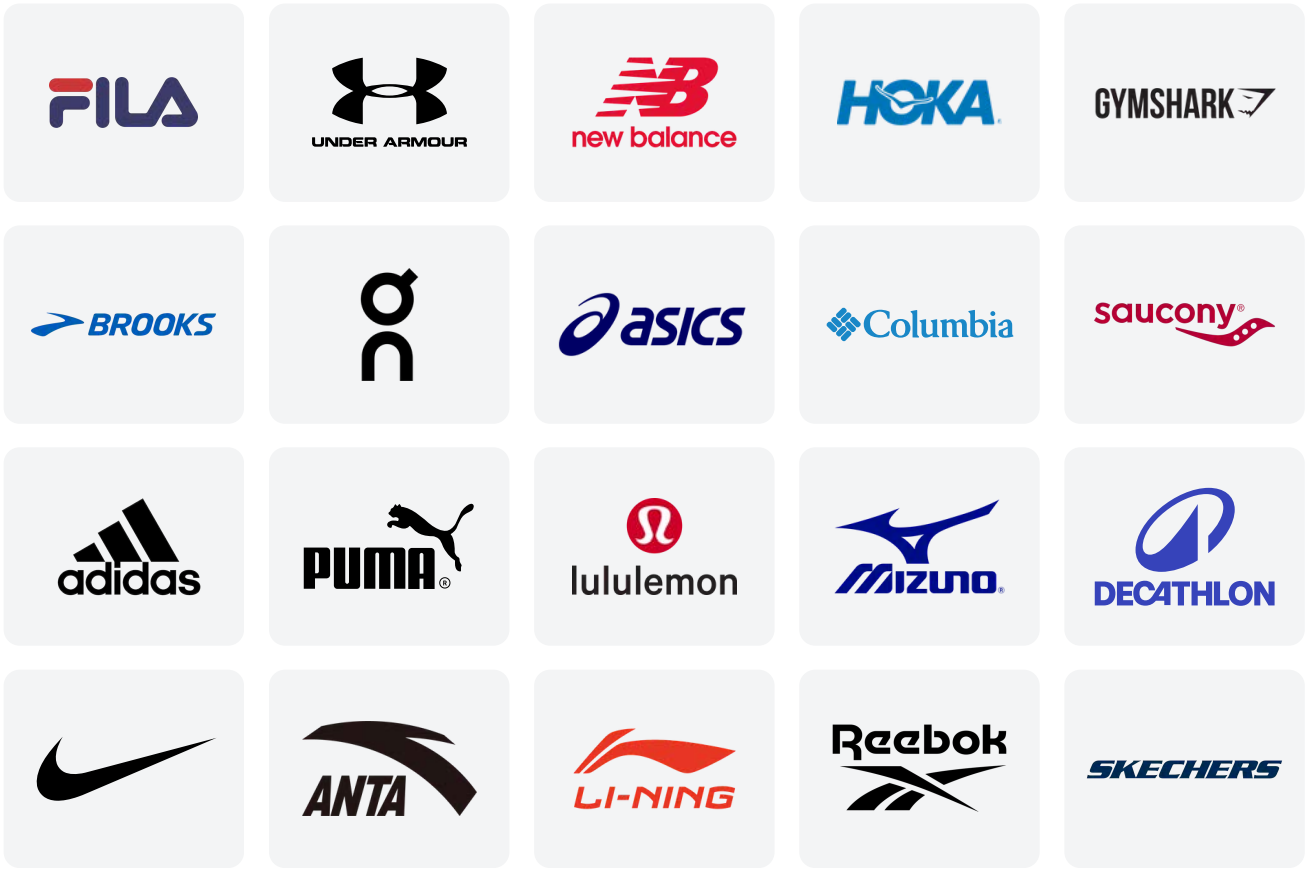
Catchpoint Industry Benchmarks

Executive Summary

Athletic brands are facing a troubling gap between what their dashboards report and what customers actually experience online. This risk is magnified heading into one of the busiest retail seasons of the year. This report analyses the top 20 athletic footwear and apparel brands by revenue, with performance measurements taken from over 120 locations around the globe and ranked using the Digital Experience Score, a holistic view of website and application performance from the users perspective.

Digital experience is no longer optional — it's survival. Poor website performance doesn't just kill online sales, it destroys in-store revenue too. **Nike's** digital platforms generate $12.1 billion of its $49.3 billion total revenue. Meanwhile, digitally influenced sales now represent 62% of all U.S. retail, rising to 70% by 2027. When your website fails, customers don't wait—they buy from competitors.

A single slow-loading page can hand customers directly to competitors who've mastered digital-first performance. The findings in this report challenge assumptions, expose blind spots, and reveal why only a handful of brands are truly delivering for customers.



Key takeaways

Big brands lose out to smaller brands on digital experience

- Smaller brands routinely beat market leaders like **Adidas** and **Nike** on digital experience
- **Nike** ranked #16 out of 20 brands for customer experience, **Adidas** performed only slightly better at #11.
- Meanwhile, **Fila, Under Armour,** and **New Balance** outperform the giants with exceptional digital experiences

Downtime costs tens of millions and erodes trust

- **Adidas'** uptime rates at just 92.4%, far below the 99.9% reliability standard for enterprise sites
- That's about 56 hours offline every month, potentially costing up to $19 million monthly or $225 million annually*

Technical metrics are a mirage – they don’t reflect customer experience

- Tech dashboards don't predict the customer's reality — nearly half (43%) of brands move five or more places between technical metrics and actual user experience
- **Skechers** ranks #4 for technical stats yet #20 for real user experience , while **Fila** flips from #8 on tech to #1 for experience
- A "green" dashboard means nothing if real customers aren't satisfied

Cloud-based monitoring is blind to user experience

- Real customers connect through consumer broadband, mobile networks, and regional ISPs, with far higher latency and variability than a hyperscale cloud data center
- In our tests, cloud agents often showed 1–3 second load times, while actual customers in the same cities waited **15–25 seconds**
- Geographic location and ISP created gaps of 10–15×, even when testing the same brand in the same city.

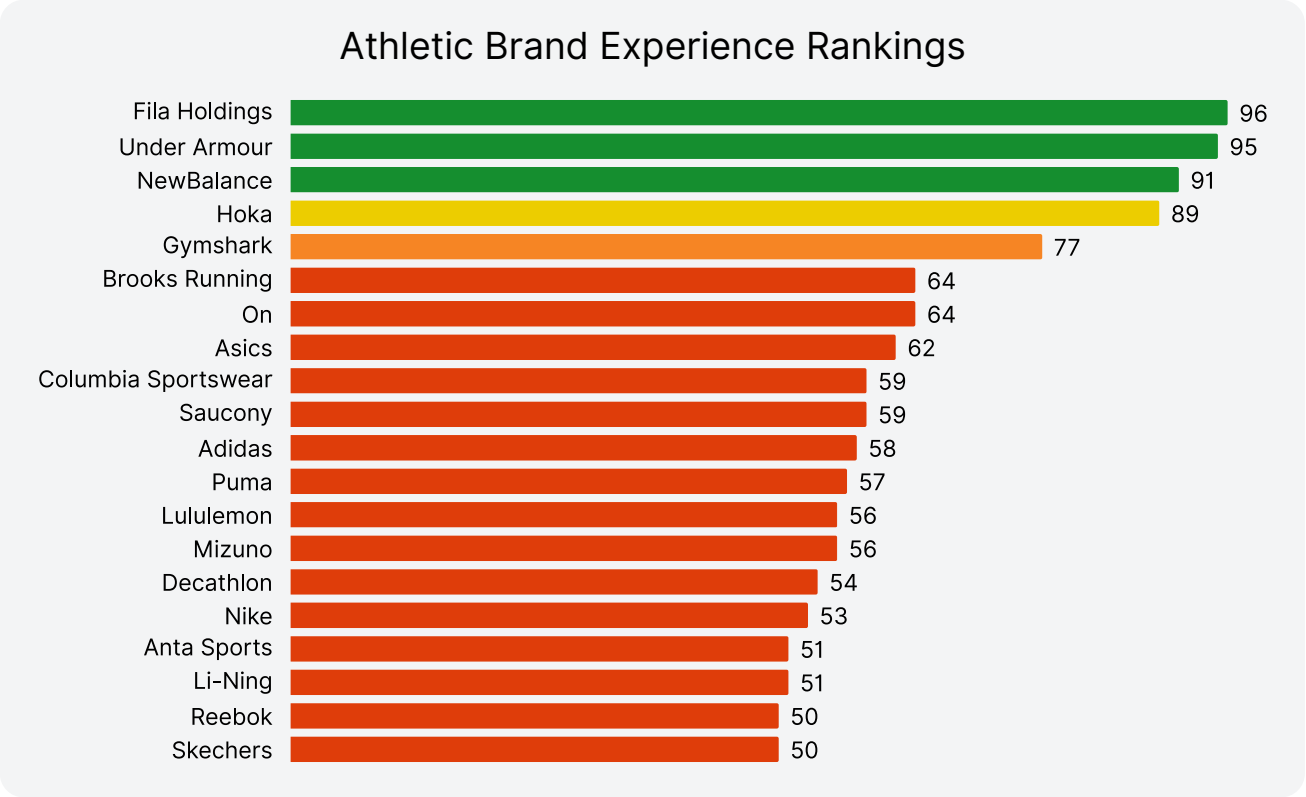
Digital experience is non-negotiable

- Nike spent **$4.3B on advertising and promotion in FY2024.**
- Yet during our testing, Nike’s site ran at only 92.9% availability — far below enterprise standards.
- This contrast underscores the importance of aligning marketing investment with Internet resilience. Even modest reallocation of spend toward site speed and stability could improve ROI by ensuring market reach translates into actual customer engagement and sales.

**Calculated using Gartner’s average downtime cost estimate ($5,600 per minute).*

Experience Score Rankings

The table below shows all evaluated athletic brand websites ranked by their overall digital Experience Score.



Understanding the Digital Experience Score

The Digital Experience Score is a single, user-centric metric (0–100) that reflects how customers actually experience a brand's digital touchpoints. Unlike raw infrastructure metrics, it combines device, network, and application factors into a holistic view of experience quality.

How it's calculated

The score is built from three dimensions:

- **Endpoint score** – end-user device performance (e.g., CPU, memory constraints)
- **Network score** – connectivity quality (packet loss, latency, round-trip time)
- **Application score** – web/app performance (load times, CLS, responsiveness, error rates)

How to read the scores

- **Leading (90–100):** Seamless, fast, globally consistent experiences
- **Strong (83–89):** Solid performance, with room to optimize consistency or stability
- **Competitive (66–82):** Acceptable but with risks, especially on mobile or in certain regions
- **Challenged (<66):** Digital friction is likely hurting satisfaction, conversion, and loyalty

For full details, see our guide to the Digital Experience Score.

Insight 1: Performance separates winners from losers

Most brands are underperforming, and revenue doesn't guarantee performance.

Only **20%** of the tested brands delivered exceptional digital experiences.

- Just four — **Fila (#1, 96), Under Armour (#2, 95), New Balance (#3, 91),** and **HOKA (#4, 89)** — land in the "Leading" or "Strong" tiers.
- The other 16 brands sit in the "Challenged" category, with experience scores below 66.

The industry's two largest players dramatically underperform:

- **Nike**, despite generating nearly **$50 billion annually,** ranked **#16** with a 52.6 experience score.
- **Adidas was firmly mid table at #11** with a 57.8 experience score and concerning 92.2% availability.

So what?

Some might ask: if even the leaders score modestly, does this matter? The answer is yes because disruption doesn't wait. Challenger brands like **On** and **Hoka** are already growing fast by capturing the revenue that giants leave behind:

- Nike shed $28 billion in market value, while **On Running grew 40% year-over-year.**
- Hoka's revenue jumped 24%, helping drive Deckers' overall 16% sales gain to nearly $5 billion.

When giants stumble, losses are amplified at global scale and create a strategic opening, one the disruptors are already exploiting.

53% of mobile visitors

leave a page that takes longer than **3 seconds** to load.

40% of users

abandon a site that takes over **3 seconds** to load.

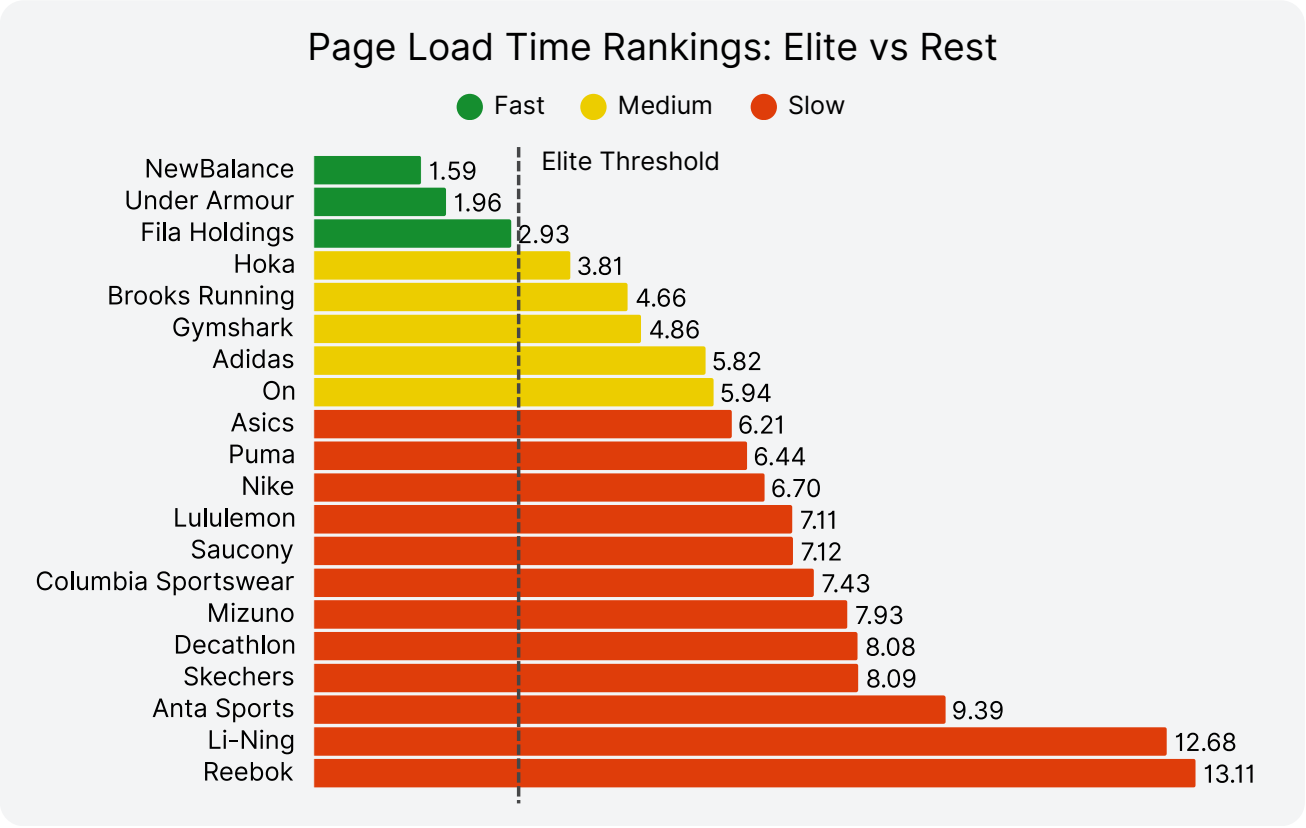
47% of consumers

expect a web page to load in **2 seconds or less.**

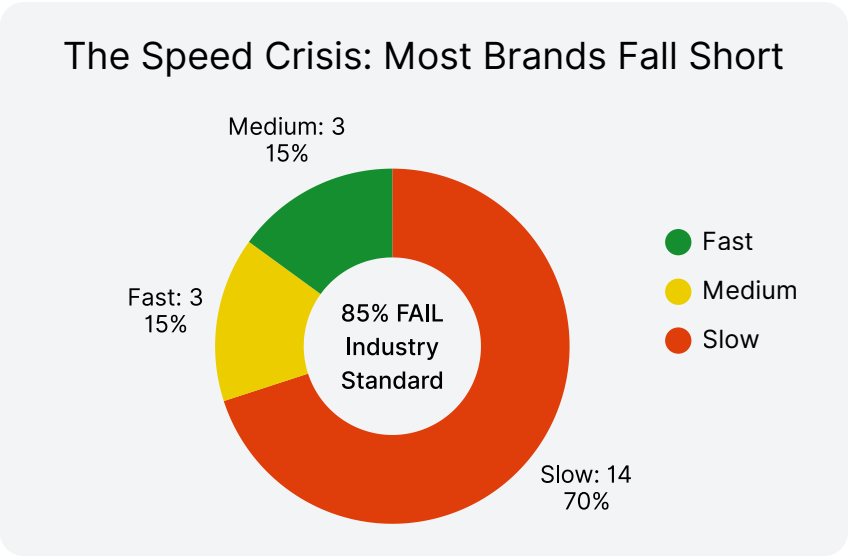
Source

The performance crisis is real

Most brands simply aren't fast enough. Only a handful clear the 3-second industry threshold while the majority crawl well beyond customer tolerance.



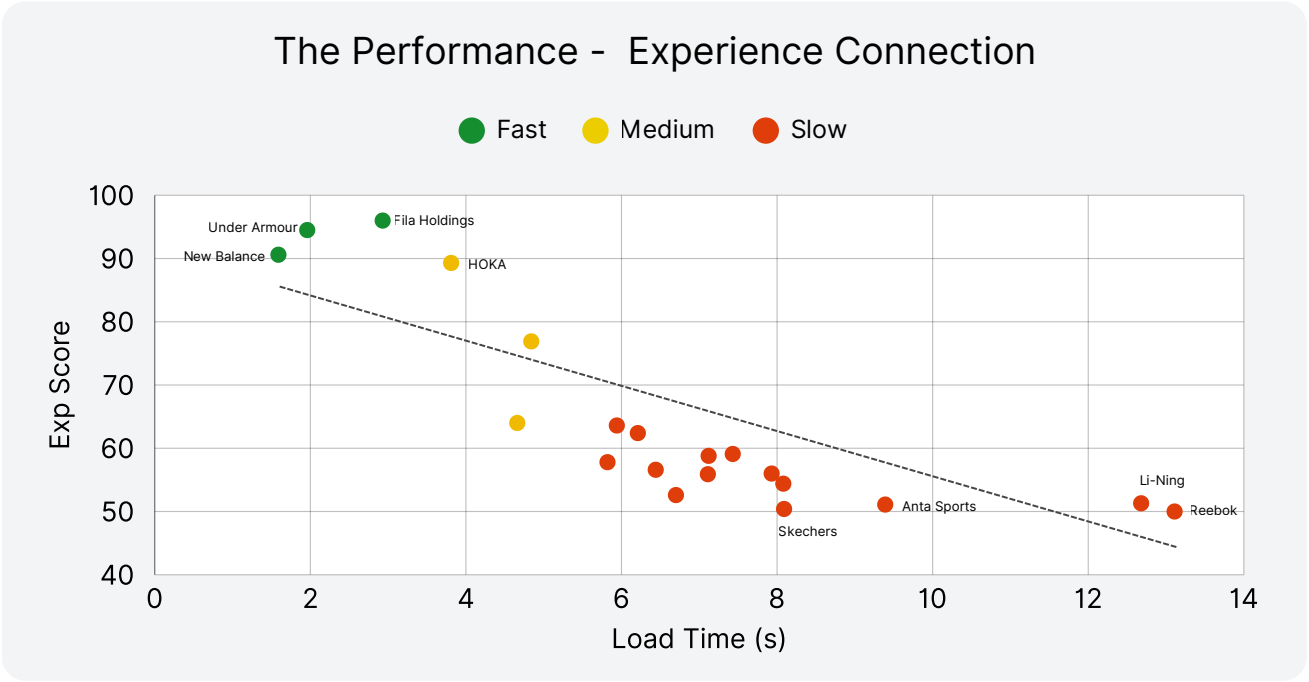
- Only **3 brands** (15%) load in under 3 seconds, the expectation from customers
- The median site takes **6.6 seconds**, more than double that standard
- **70% of brands** exceed 5 seconds



85% of brands fail the industry standard.

Speed and experience move in perfect harmony

The data makes it clear: faster sites consistently deliver better experiences, not by coincidence, but by cause and effect.



The faster the site, the higher the experience score

- Correlation between load times and experience scores: **-0.829** — the slower a site loads, the worse the customer experience
- The performance elite — **New Balance, Under Armour, Fila, HOKA** — average 2.6s load times and a 92.6 score.
- Bottom performers average 10.8s loads and a 50.7 score — a **320% gap.**
- The fastest performer loads **8.2x faster** than the slowest.

Why the performance elite wins

The top performers haven't just optimized their websites—they've recognized that in today's instant-gratification economy, slow is the new down. When customers can abandon a slow site and reach a competitor in seconds, speed becomes the ultimate competitive advantage.

Takeaway:

The question isn't whether you can afford to optimize for speed—it's whether you can afford not to when 85% of your competitors are leaving this advantage on the table.

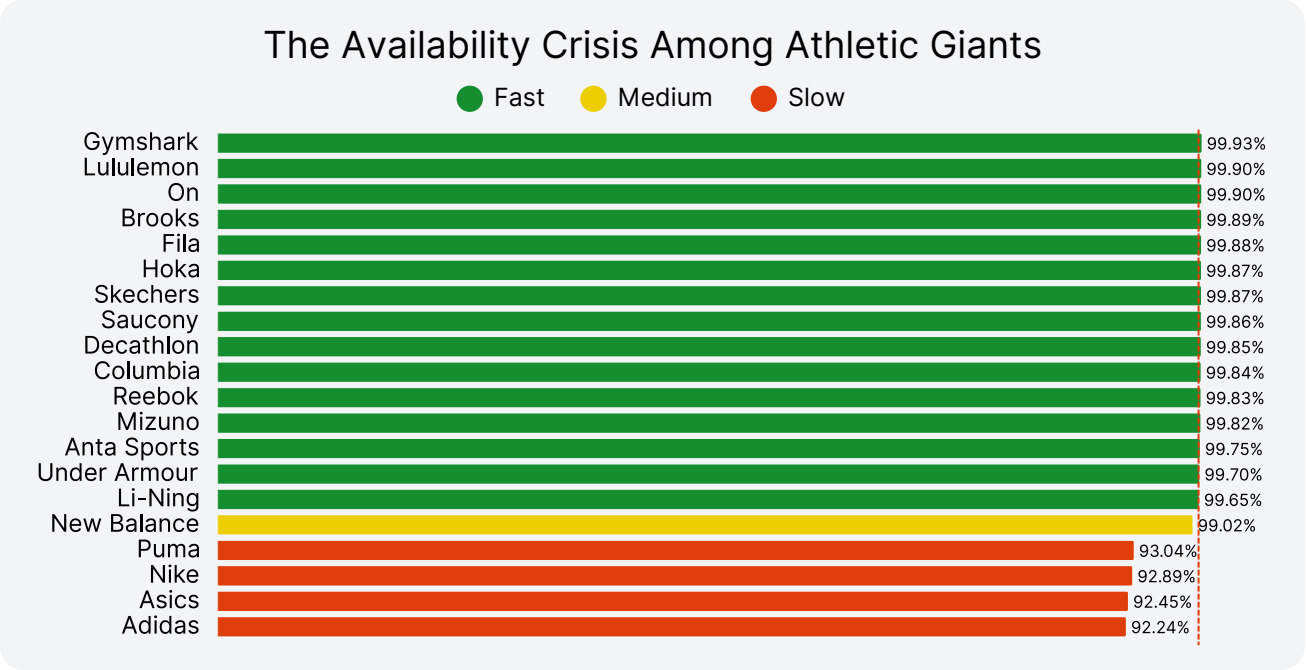
Curious how your brand compares?

Get a Free Retail Assessment with one of our Internet Performance Monitoring experts.

Insight 2: The giants of the industry are struggling to stay online — and it's costing them

The biggest names, **Nike, Adidas, Puma,** and **Asics,** operate with sub-par reliability, well below enterprise standards.

- **The gap is huge: Gymshark** runs at 99.93%, **Adidas** just 92.24%
- **The giants are in crisis: Nike, Adidas, Puma,** and **Asics** all fall under 93% availability.
- **Challengers excel: Gymshark, On,** and **Brooks** prove near-perfect uptime is possible, consistently above 99.8%.



Challengers hit near-perfect uptime. Giants like **Adidas** and **Nike** lag dangerously behind.

The downtime bill for giants

When availability slips below enterprise standards, the financial impact is staggering. **Nike** and **Adidas**, the two biggest names in athletic retail, are losing hundreds of millions each year simply because their sites don't stay online.

- **Nike (92.9% availability)**
  - ~51 hours of downtime per month
  - **$17M** lost monthly
  - **$200M+** lost annually
- **Adidas (92.2% availability)**
  - ~56 hours of downtime per month
  - **$19M** lost monthly
  - **$225M+** lost annually

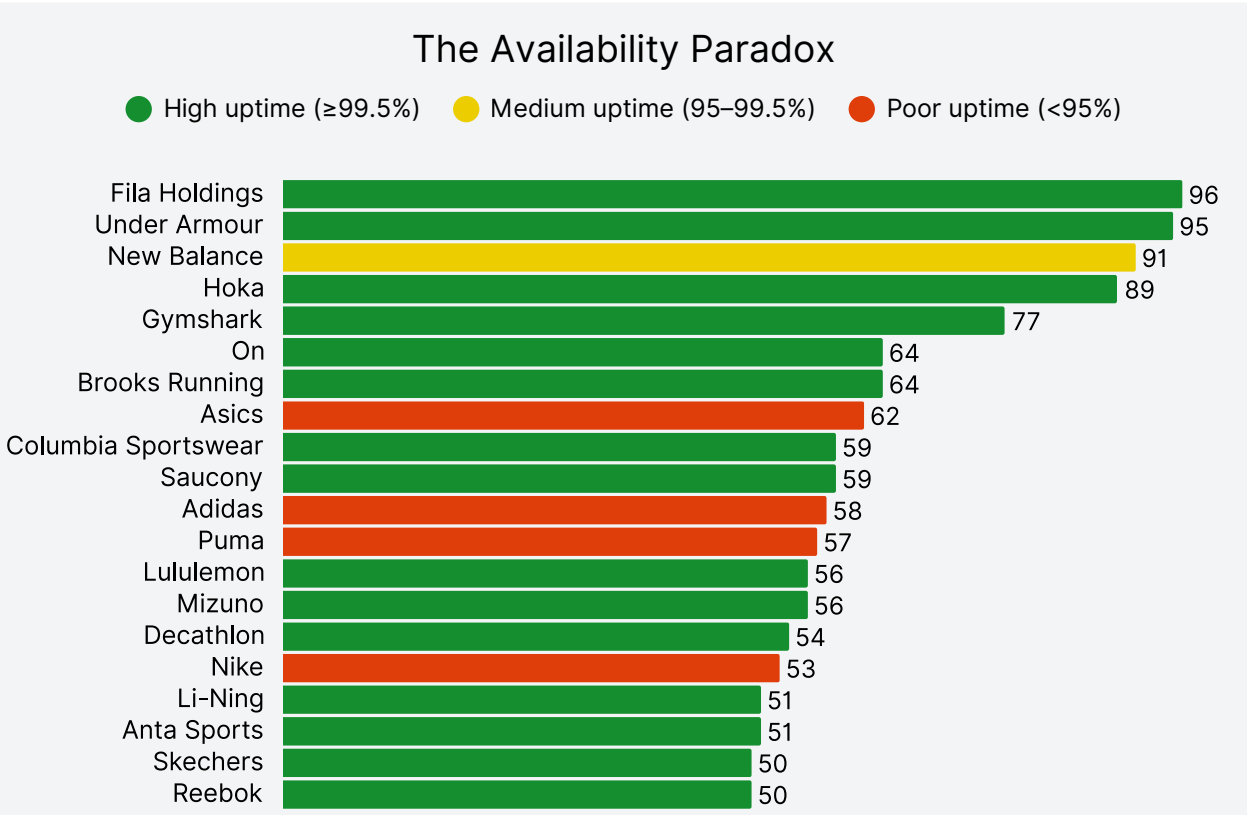
** Downtime costs calculated using Gartner's $5,600/minute industry benchmark.*

Takeaway:

The giants aren't just failing technically. They're leaking hundreds of millions in lost sales and eroded trust.

The availability paradox

Perfect uptime doesn't guarantee good experiences. Over half of high-uptime brands still fail customers.



- **16 of 20 brands (80%)** run at ≥99.5% availability.
- Yet more than half still deliver weak experiences (<66)
- **Adidas, Puma,** and **Lululemon** illustrate this paradox clearly: high uptime, weak experiences.

Takeaway:

Availability is table stakes. Giants lose revenue when they can't stay online — but even perfect uptime means nothing without speed, stability, and usability.

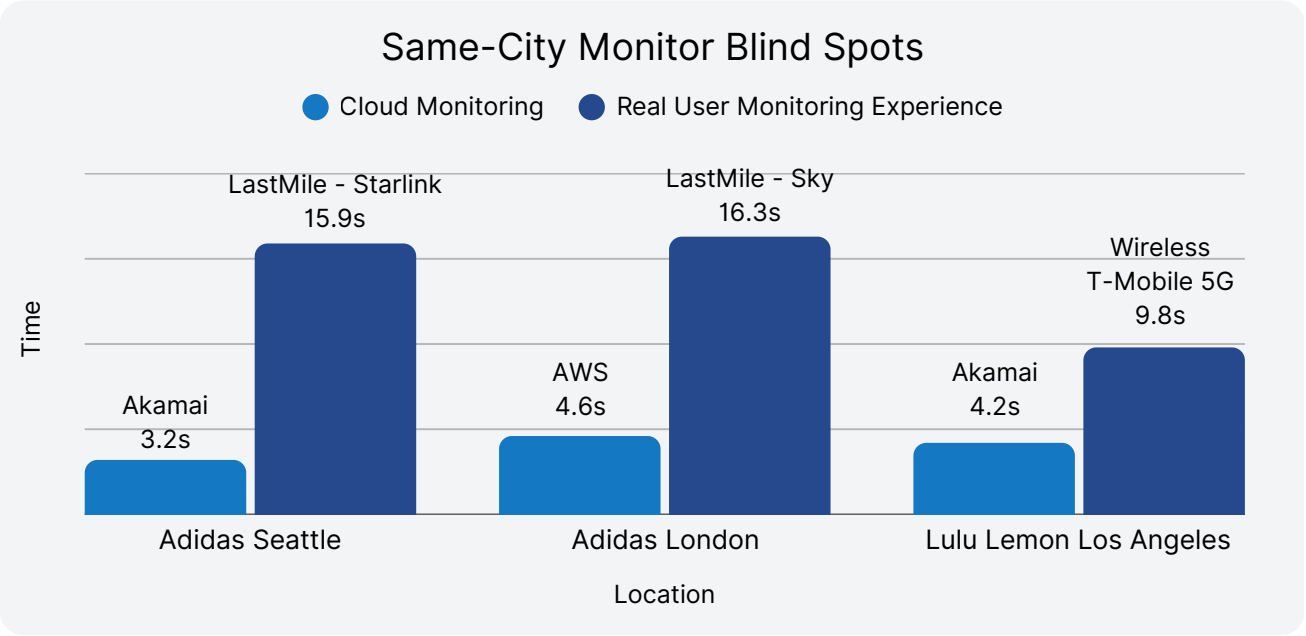
Insight 3: The monitoring blind spot - when location determines reality

In the same city, for the same website, real customers waited up to 15× longer than cloud dashboards suggested.

Cloud dashboards don't match customer reality. In our snapshot tests of **Nike, Adidas**, and **Lululemon**, the same websites showed radically different load times, sometimes 8–15× slower experiences, depending on where the performance was measured. Cloud agents running in controlled, data-center environments tended to showed fast results, while last-mile monitoring (simulating real users on consumer ISPs) exposed much slower, less reliable experiences.

Same-city monitoring blind spots

This chart shows how monitoring vantage point alone can change the performance story.



Cloud monitoring shows 3–5s load times, but local ISP users in the same cities waited 15–16s — up to 14× slower.

Why this matters: same-city comparisons remove geography. The only difference is **how monitoring is done:**

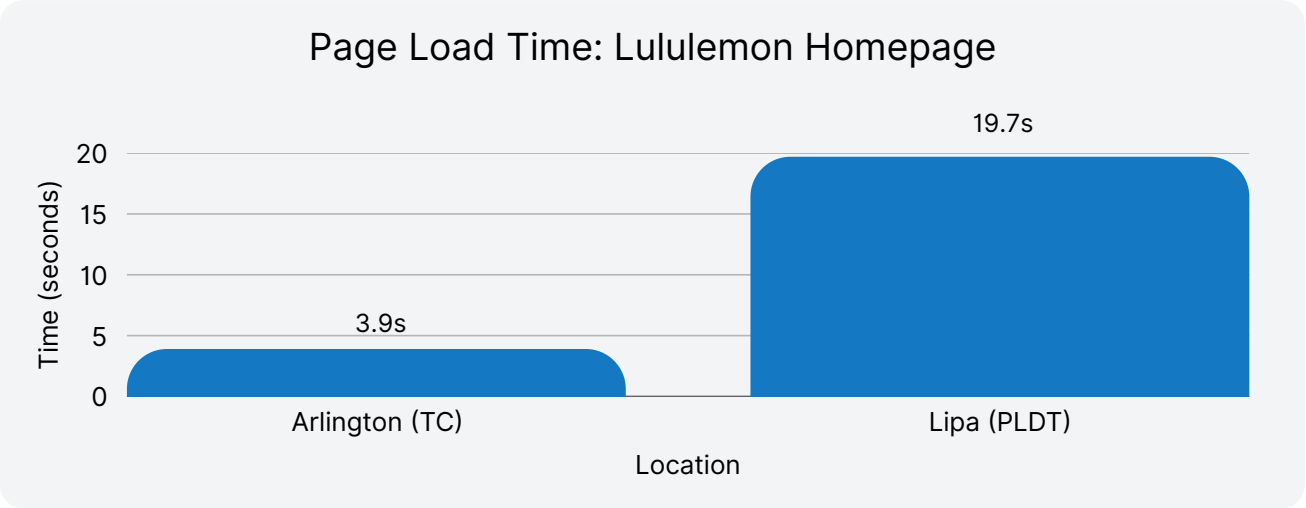
- Cloud and backbone vantage points run on optimized infrastructure and premium routes.
- Real customers connect over broadband, mobile, or satellite with variable performance.

Takeaway:

Performance gaps this large directly impact conversion rates and customer satisfaction. Brands should prioritize last-mile testing in key markets to identify where real users face unacceptable load times.

Lululemon: The global expansion blind Spot

Perfect uptime doesn't guarantee good experiences. Over half of high-uptime brands still fail customers.

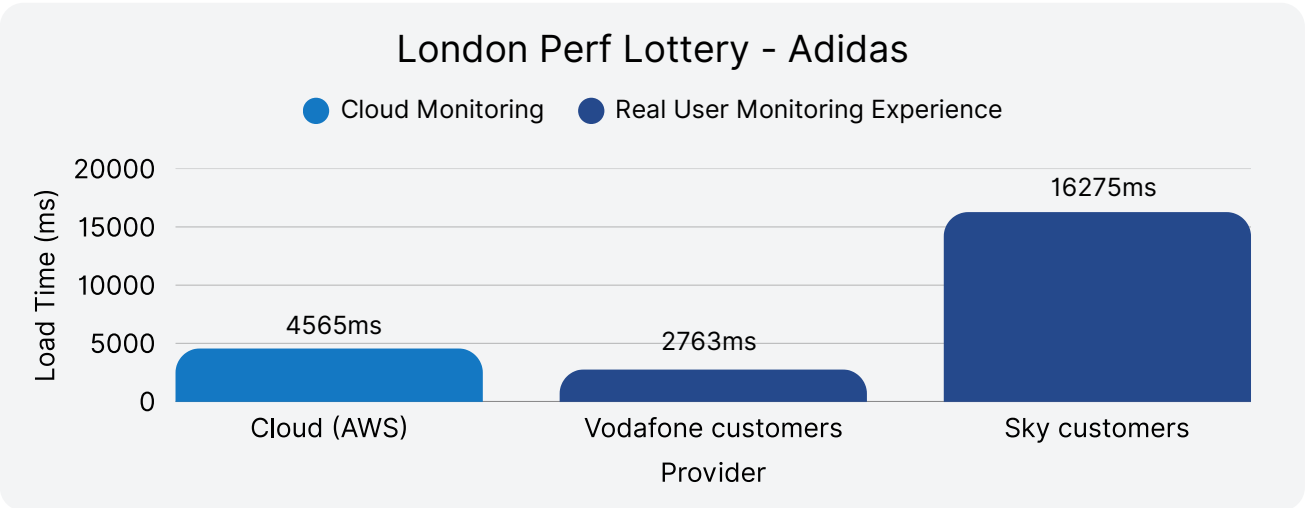


3.9s from a U.S. cloud vantage vs. 19.7s for PLDT broadband users in the Philippines — a 15.8s gap.

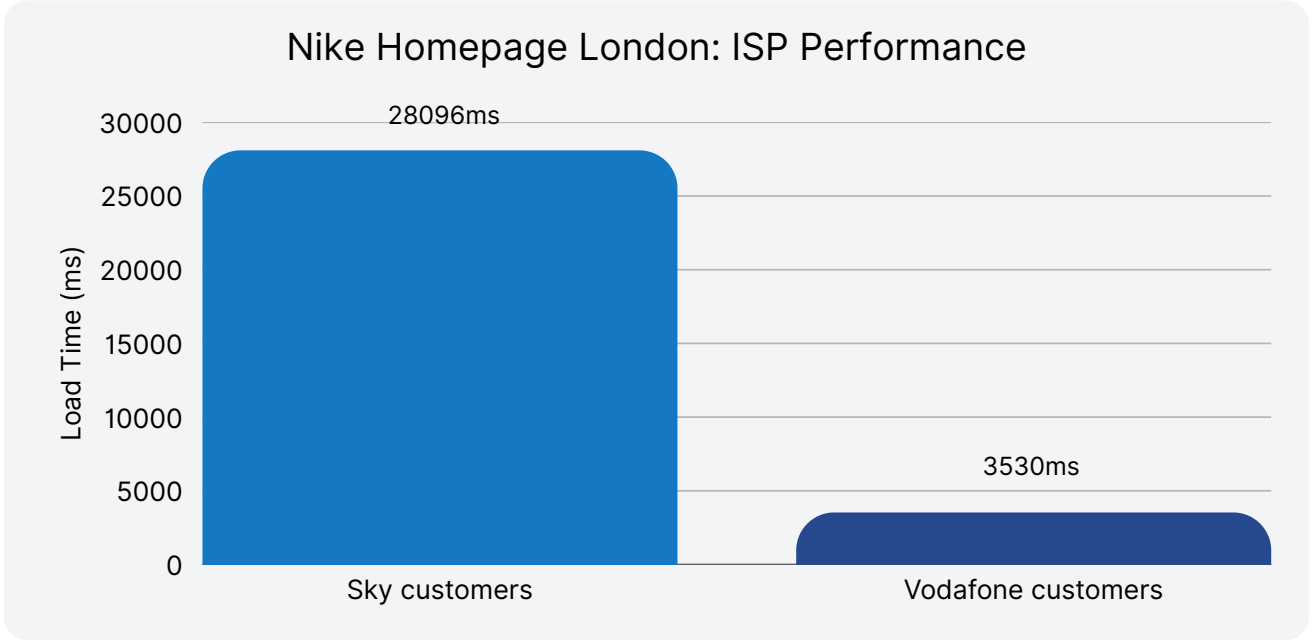
Beyond city-level tests, the gaps widen globally. U.S.-based monitoring creates a false sense of security: what looks fine at home is unusable abroad. These aren't edge cases; they appear in key expansion markets.

The lastmile ISP lottery

Even within one city, user experience can vary wildly based on ISP.



AWS Cloud shows ~4.6s. Vodafone users load in 2.8s (39% faster), while Sky customers wait 16.3s (3.6× slower)



Nike users on Sky wait 28s vs. 3.5s for Vodafone — an 8× difference in the same city.

The blind spot: Cloud dashboards flatten these differences into a "steady" number, masking the 5–8× swings real customers feel.

Takeaway:

For user experience, cloud monitoring alone is useless

Cloud agents are valuable for QA and server diagnostics. But for customer reality, they are misleading:

- They fail to capture the variability of real ISPs, mobile, and last-mile connections.
- They mask dramatic gaps where real users wait up to 15× longer than cloud "guarantees."

To truly optimize for customer experience, brands must:

- Monitor from last-mile, ISP, and mobile perspectives—alongside cloud.
- Focus remediation on where users struggle, not just where applications perform well under ideal conditions.
- Use these insights to guide optimizations that matter most for real-world customers, not just infrastructure health.

Insight 4: When dashboards lie - The technical vs reality gap

The most dangerous assumption in digital performance management? That green dashboards mean happy customers.

We ranked all 20 brands twice: once by customer experience, once by traditional technical metrics. The results expose a disconnect that explains why so many digital teams fail despite "perfect" infrastructure monitoring.

Complete Athletic Brands Performance Rankings

Exp Rank	Brand	Experience Score	Traditional Rank	Rank Difference
1	Fila Holdings	96	8	**+7**
2	Under Armour	95	3	+1
3	New Balance	91	1	-2
4	Hoka	89	2	-2
5	Gymshark	77	6	+1
6	Brooks Running	64	9	+3
7	On	64	14	**+7**
8	Asics	62	18	**+10**
9	Columbia Sportswear	59	16	**+7**
10	Saucony	59	12	+2
11	Adidas	58	17	**+6**
12	Puma	57	10	-2
13	Lululemon	56	7	**-6**
14	Mizuno	56	11	-3
15	Decathlon	54	5	**-10**
16	Nike	53	19	+3
17	Anta Sports	51	13	-4
18	Li-Ning	51	20	+2
19	Reebok	50	15	-4
20	Skechers	50	4	**-16**

- **Positive Rank Difference:** real users experience the site better than the technical metrics suggests (over-performer).
- **Negative Rank Difference:** the site looks better on paper than it feels to users (under-performer).

What are technical metrics?

In addition to the Digital Experience Score, we evaluated each brand's website across eight core technical metrics. These capture how a site performs from an infrastructure and browser perspective, and are commonly used in digital performance monitoring.

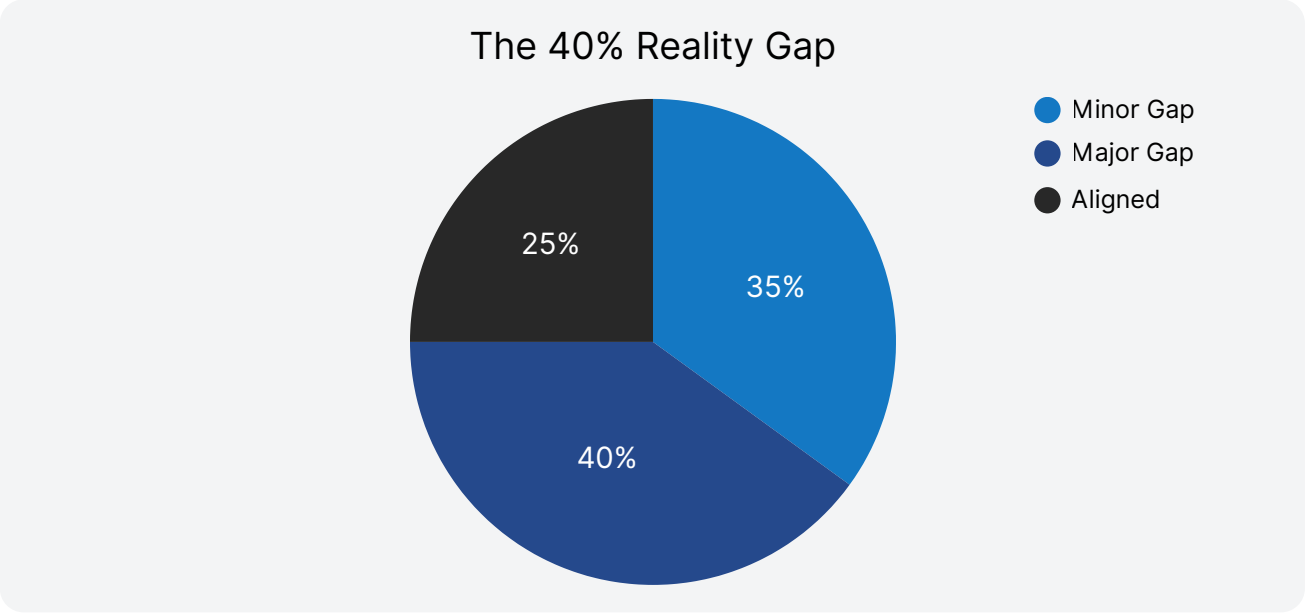
Metrics tested:

- **Availability** (16%) – Uptime percentage (target ≥99.9%)
- **Document Complete** (12%) – Time until all key page elements are loaded (≤3s)
- **Page Load Time** (12%) – Time until entire page is fully loaded (≤3s)
- **Response Time** (12%) – Time to complete a full request (≤500ms)
- **Time to First Byte** (12%) – Time to receive first byte from server (≤200ms)
- **Largest Contentful Paint** (12%) – Time to load main content block (≤2.5s)
- **Cumulative Layout Shift** (12%) – Visual layout stability (<0.1)
- **DNS Lookup Time** (12%) – Time to resolve domain to IP address (≤100ms, ideally <50ms)

Ranking methodology:

- Availability was weighted more heavily (16%) because downtime directly translates into lost sales and trust.
- The other seven metrics were weighted equally (12% each) to reflect the balance of speed, responsiveness, and stability that shape customer experience.

The dashboard deception: when good metrics mask bad experiences

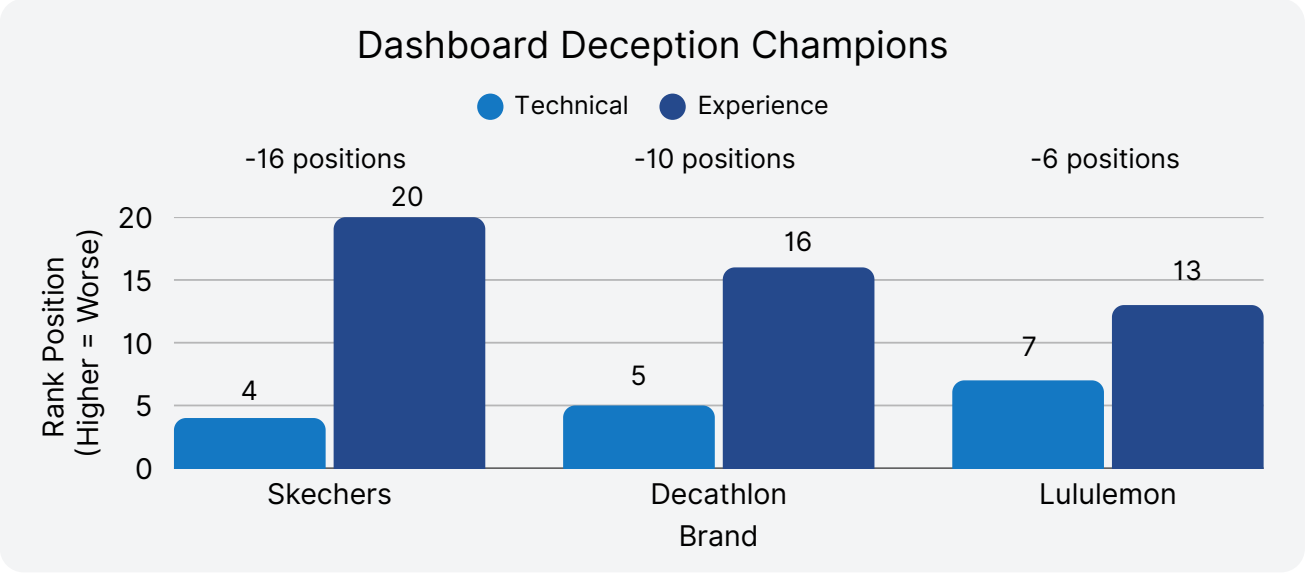


40% of athletic brands shift by 5+ places between technical and experiencerankings — proving dashboards don't tell the whole story.

This gap explains why digital teams struggle to improve business metrics despite green dashboards—they're optimizing for the wrong measures while customers suffer in silence.

The green dashboards, red reality club

Some brands shine in technical checklists but fall apart in real life.



Skechers (-16), Decathlon (-11), and Lululemon (-6) all look strong on paper but deliver weak experiences in practice.

The hidden gems: modest tech, exceptional experience

Asics: the biggest comeback story

- Technical rank: #18 → Experience rank: #8 **(+10 positions)**
- Shows how customer-focused optimization beats raw infrastructure

Fila: from middle pack to market leader

- Technical rank: #8 → Experience rank: #1 **(+7 positions)**
- Demonstrates user-centric execution trumps technical perfection

The alignment champions: strong on both fronts

Only two brands successfully convert technical strength into customer experience:

- **Under Armour:** Technical #3 → Experience #2 (+1 position)
- **New Balance:** Technical #1 → Experience #3 (-2 positions)

Both prove that well-designed systems can excel across multiple performance dimensions simultaneously.

Takeaway:

Traditional monitoring misses what actually drives satisfaction. Green dashboards are not enough: customers judge performance in real time.

Conclusion: Digital experience decides the winners

Across performance, availability, technical metrics, and monitoring blind spots, one truth cuts through: what customers actually experience online is often far worse than dashboards suggest.

- Performance separates winners from losers: Only four brands deliver acceptable load times, while 85% fail the 3-second benchmark.
- Availability is table stakes: giants like Nike and Adidas suffer hundreds of millions in downtime costs while smaller challengers stay online.
- Technical metrics mislead: nearly half of brands look “green” on dashboards yet fail customers in practice.
- Cloud monitoring hides reality: in the same city, real users wait up to 15× longer than cloud dashboards report.

The lesson is clear: digital excellence doesn’t come from infrastructure metrics or perfect uptime alone. It comes from monitoring and optimizing the real customer journey, across devices, networks, and geographies.

In today’s fragmented and unforgiving market, digital experience is no longer optional. It is the ultimate competitive advantage.

Testing methodology

This benchmark evaluated 20 of the world's largest athletic footwear and apparel companies, compiled by global revenue rankings to ensure representation of the industry's most influential brands.

Timeframe

All data was collected between August 1 and August 31, 2025, providing a consistent one-month snapshot of real-world performance across all monitored sites.

Monitored Pages

We tested the public homepages of each company — the first touchpoint for most shoppers. This provided a standardized basis for comparison, capturing how a typical visitor experiences each brand's digital storefront.

Testing Locations

Tests were conducted from **123 global monitoring locations** across six continents:

- **26** North American agents
- **97** international agents, including the UK, Germany, India, Japan, Australia, South Africa, and Brazil

Agent types used

Catchpoint's Global Agent Network includes cloud, wireless, last mile ISP, and backbone agents, each offering distinct vantage points to measure performance across region

- **Cloud agents** operate within major public cloud providers (AWS, Azure, Google, etc.), detecting performance issues inside cloud data centers.
- **Wireless agents** simulate real-world mobile access (3G/4G/5G) across carriers, revealing issues unique to cellular users.
- **Last-mile ISP agents** run on actual residential broadband networks, capturing the true end-user experience with each local ISP.
- **Backbone agents** are placed in Tier 1 and Tier 2 ISPs, providing a core Internet perspective to spot global trends, routing anomalies, and CDN-level outages.

Why variety matters

Using these varied agents delivers comprehensive visibility, ensuring both global averages and regional nuances in performance are accurately detected and differentiated.

About Catchpoint

Trusted by the world's leading brands who understand in the digital age performance is paramount, Catchpoint is dedicated to monitoring what matters from where it matters to catch issues across the Internet Stack before they impact business.

The Catchpoint Platform offers a comprehensive suite of Internet Performance Monitoring(IPM) capabilities, including Internet Synthetics, RUM, BGP, Tracing, performance optimization, and advanced analytics, all supported by high-fidelity data and flexible visualizations. Leveraging thousands of global vantage points inside the critical systems that make the Internet work, Catchpoint provides unparalleled visibility into what affects customer experiences, workforce efficiency, network performance, websites, applications, and APIs.

Today's digital world requires resilience and exceptional performance, which is why *The Internet Relies on Catchpoint*.

Learn more about IPM

Curious how your brand compares?

Get a free assessment with one of our IPM experts.