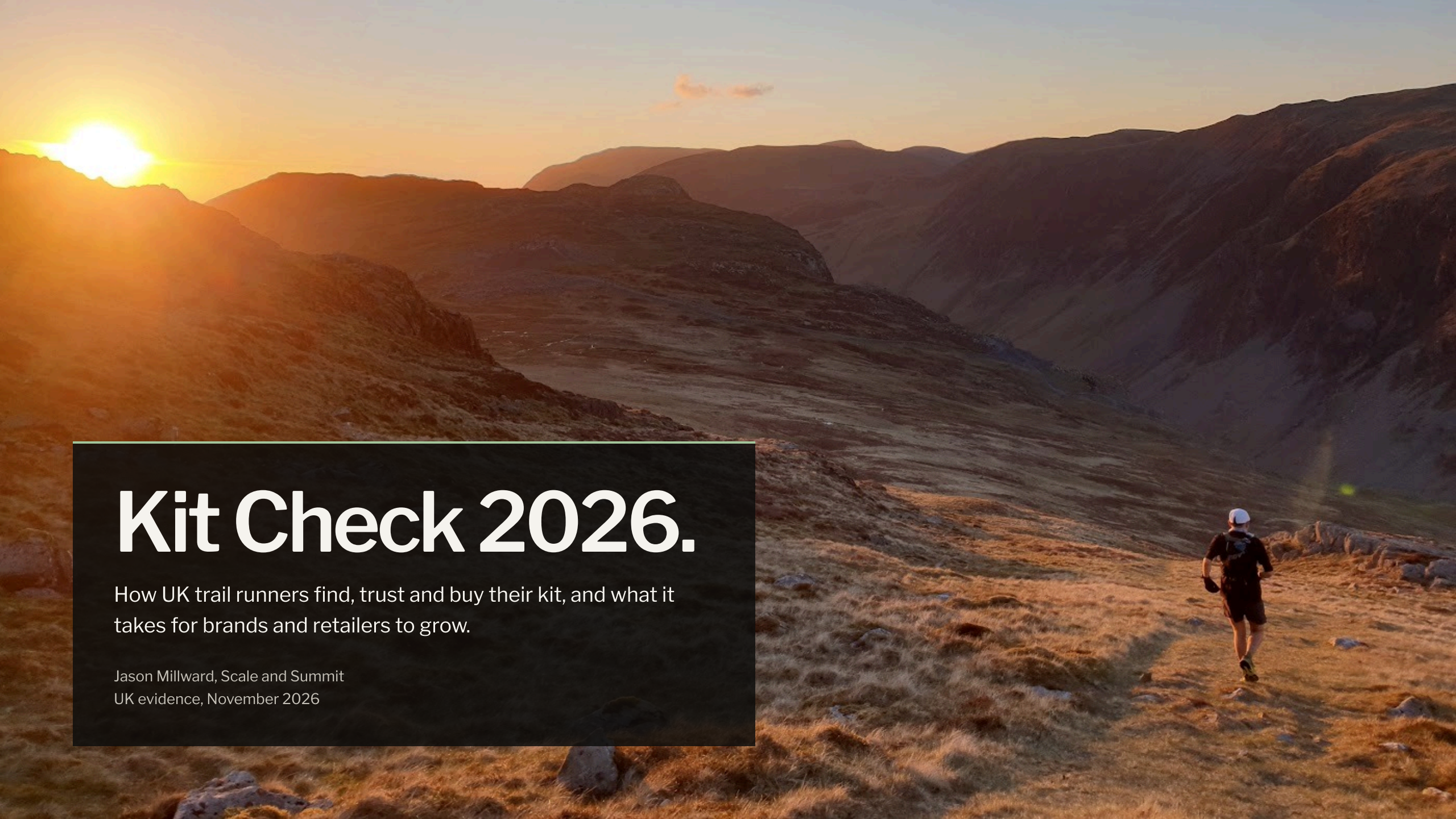


Kit Check 2026.

How UK trail runners find, trust and buy their kit, and what it takes for brands and retailers to grow.

Jason Millward, Scale and Summit
UK evidence, November 2026

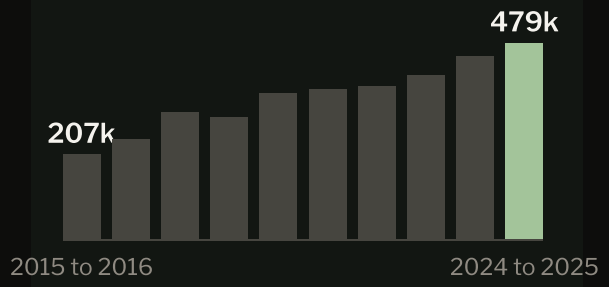
The market on one page.

A committed audience that has more than doubled since 2015, buys online and in shops, and a market under heavy discounting.

The market

2.3x

Adults in England fell or trail running, 2015 to 2025. 34% are women.

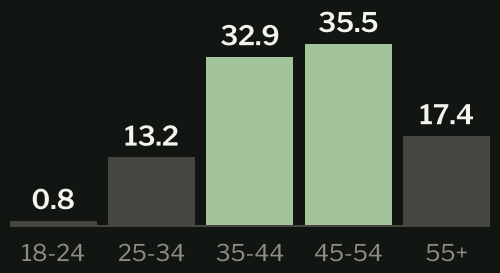


Sport England Active Lives

The buyer

68%

Of British trail and ultra runners are 35 to 54. 55% are in a club.



UCLan, British respondents, 2022

How they buy

83%

Use the internet to buy or research outdoor kit. Half still buy in a shop.



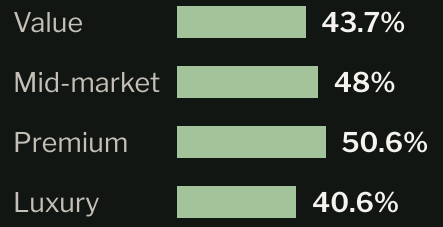
- **49%** buy online
- **34%** research online, buy in a shop
- **17%** buy in a shop

NZTE via Toluna, 415 UK outdoor buyers, 2025

The pressure

Up to half

Of UK sports shoe listings were on sale in October 2026 (41% to 51% by retailer type), at 32% to 37% off.



Data Purl, UK online retailers

Growth is a handful of numbers, and profit is the test.

Every action in this report moves one of eight numbers. The evidence shows where the UK trail market gives each one room to move.

Profitable growth

Revenue

Visitors

Discovery splits by age. Search is trusted three times more than social.

Conversion

37% are unsure of their shoe; 85% check reviews first.

Order value

Race kit lists and small add-ons at the shoe checkout.

Repeat

54% of outdoor buyers replace worn kit; only 17% of runners change shoes yearly.

Profit kept

Margin

Comfort, durability and quality outrank price.

Discounting

Up to half of sports shoe listings are on sale.

Returns

Fit is the top reason shoppers return, named by 57.6%.

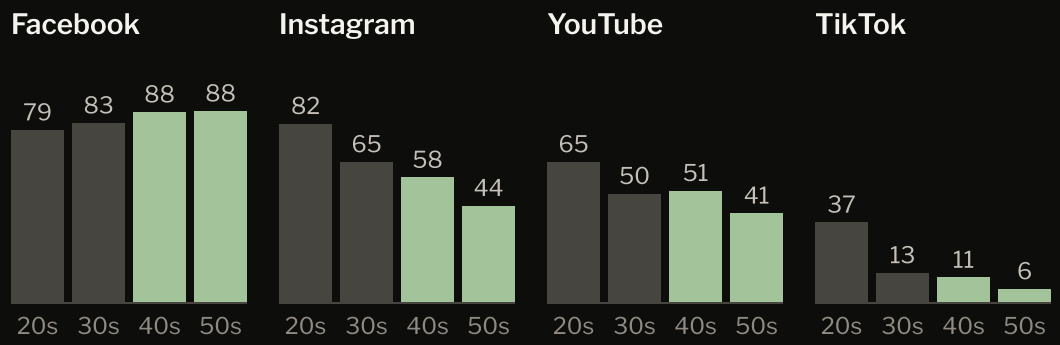
Acquisition cost

27% trust social ads; word of mouth leads at 34%.

The next five slides take these as five levers, each with what a brand and a retailer should do and how to measure it.

Acquisition: be found where trust is built.

Runners using each platform for running content, by age



Running Studies 2025, 2,112 UK runners. Green: runners in their 40s and 50s, the core trail buyer.

59% vs 19%

Trust in search engine results against social media. Ofcom 2025.

+149%

AI-referred visits to UK retail sites in a year. Adobe 2026.

For brands

Own the search for your brand and every model name, organic first, paid where retailers outbid you.

Put social budget against the age you sell to: Facebook and YouTube for your 35 to 54 core, creators for under-45s.

Get onto race kit lists and sponsor pages, and feed retailers full product data.

For retailers

Win the searches big multi-brand sites are losing: terrain, race and problem pages.

Time campaigns to race entry in January and early September, and six to eight weeks before each race.

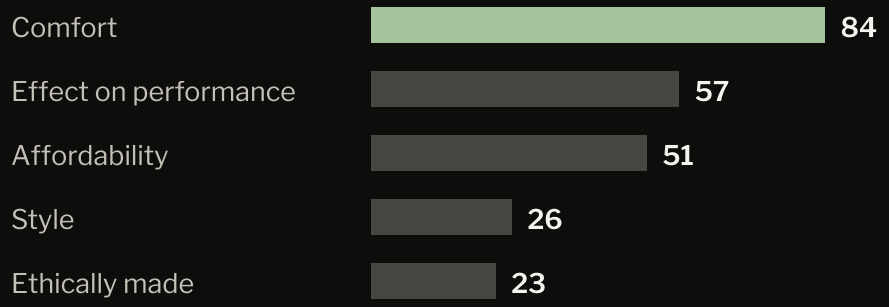
Partner with clubs: for club runners, the club is where they hear about races and kit.

Measure: new customers and their cost by channel, not clicks or returning buyers.

Profit lens: only 27% trust social ads, 9% of over-55s. Heavy retargeting can buy sales you'd mostly get anyway.

Conversion: answer the fit question before checkout.

What matters in choosing running shoes, out of 100



Running Studies 2025, 2,112 UK runners. Trail runners rate comfort highest of the race types, at 86.

37%
Of UK runners aren't sure they wear the right type of shoe. SportsShoes 2026.

85%
Of UK shoppers check at least one review site before buying. Feefo, a review platform, 2026.

For brands

On every shoe: terrain in plain English, forefoot width in millimetres, and fit against the last version.

Collect reviews that mention terrain, fit and durability, and show them beside the size selector.

Show where to try it on, and consider a wear trial: On already offers members 30 days.

For retailers

Make race kit specs filterable: taped seams, hood, hydrostatic head, lumens, bivvy size.

Offer trail fitting advice in store, by phone or video, saved to the customer's account.

Show delivery cost, arrival date and return terms on the product page.

Measure: conversion by product page, and size-related returns by model.

Profit lens: fit is the top reason UK shoppers return items (57.6% name it), and each return costs the margin and the postage twice.

One product page, two jobs.

A brand gives a reason to buy direct. A retailer helps someone choose between brands and buy here. The fit answers are the same.

Brand website

Job: a reason to buy direct

brand website / trail shoes / model

Photos and video

Model name, version 5 · Price

- **Terrain and fit:** wet rock, mud, hardpack · forefoot 98mm
- **What changed from version 4:** roomier toe box, deeper lugs, 20g lighter
- **Size** with fit note: half a size small
- **Every size and width,** exclusive colours
- **Delivery, returns,** free size exchange
- **Try it:** stockists with your size nearby, 30-day wear trial
- **Our range compared** by terrain and distance
- **Warranty, repair,** trade-in
- **Reviews** filtered by terrain and fit
- **Register your shoes:** replacement reminder

Why: 36% of outdoor buyers have bought from brand websites, against 23% from Amazon, but chains reach more (Sports Direct 50%). Direct needs a reason: range, newness, trial and aftercare, at full price.

Retailer website

Job: choose between brands, buy here

retailer website / trail running / shoes / model

Photos and video

Brand, model name · Price

- **Club and member price,** price match
- **Terrain and fit:** wet rock, mud, hardpack · forefoot 98mm
- **Fits like:** two models from other brands with a similar width
- **Size** with fit note: half a size small
- **In stock at 3 shops nearby:** click and collect, book a fitting
- **Delivery, returns,** free size exchange
- **Staff pick:** tested by our team on local trails
- **Add to the basket:** trail socks, blister kit
- **Reviews** filtered by terrain and fit
- **Fit profile saved,** back in stock by size

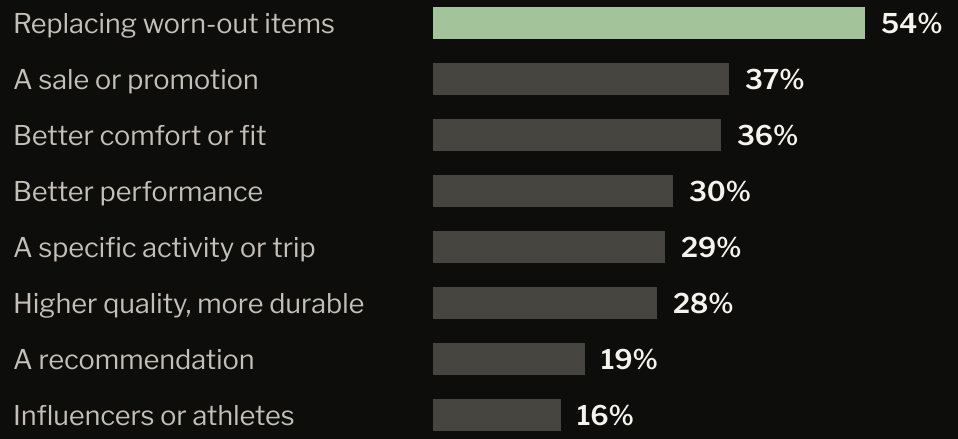
Why: 34% of outdoor buyers research online and buy in a shop, and specialists beat the big chains on customer score. A retailer wins on choice, advice and convenience, not on one brand's story.

☐ Same on both: the fit answers, sizes, delivery and returns, reviews ☐ Different: what each business is there to do

An illustrative layout with invented details, not a real product or a client's site.

Retention: prompt the replacement runners keep putting off.

Main reasons for buying outdoor kit in the past year



NZTE via Toluna, 2025, 415 UK outdoor kit buyers.

17%
Of UK runners change their running shoes at least once a year. SportsShoes 2025.

59.7%
Of UK shoppers reconsider a retailer after a damaged delivery. Sendcloud 2025.

For brands

Replacement reminders timed to each customer's own buying interval, by model.

Warn owners before an update changes the fit, and point them to the closest match.

Care, repair and trade-in, as Rab, Montane, OMM and inov-8 already do.

For retailers

Saved fit profiles and back-in-stock alerts by size.

Race-calendar email: entry, training, kit check and post-race.

Membership built on service (exchanges, warranty, advice) rather than points.

Measure: repeat rate at twelve months, email and SMS share of revenue, time to second order.

Profit lens: a repeat order carries no acquisition cost, so it's usually the most profitable sale you make.

Margin: don't let the market's discounting set your price.

Share of in-stock UK sports shoe listings on sale, October 2026



Data Purl, about 21,000 products tracked weekly at UK online retailers. Average discount on sale items: 32% to 37%. Listings, not sales.

43% vs 33%

Outdoor buyers putting comfort in their top three considerations, against price. NZTE 2025.

-1.3%

Annual change in UK footwear prices, below a year earlier every month since April 2025. ONS.

For brands

Know contribution by product after discount, returns, delivery and media. The bestseller is often not the earner.

Sell end of line deliberately, through one outlet route, not every channel at once.

Agree pricing terms with retailers; use exclusives, bundles and launches to hold full price.

For retailers

Benchmark the real price after club, partner and loyalty discounts on your hero products.

Compete on expertise and range depth, where Sports Direct and JD can't follow.

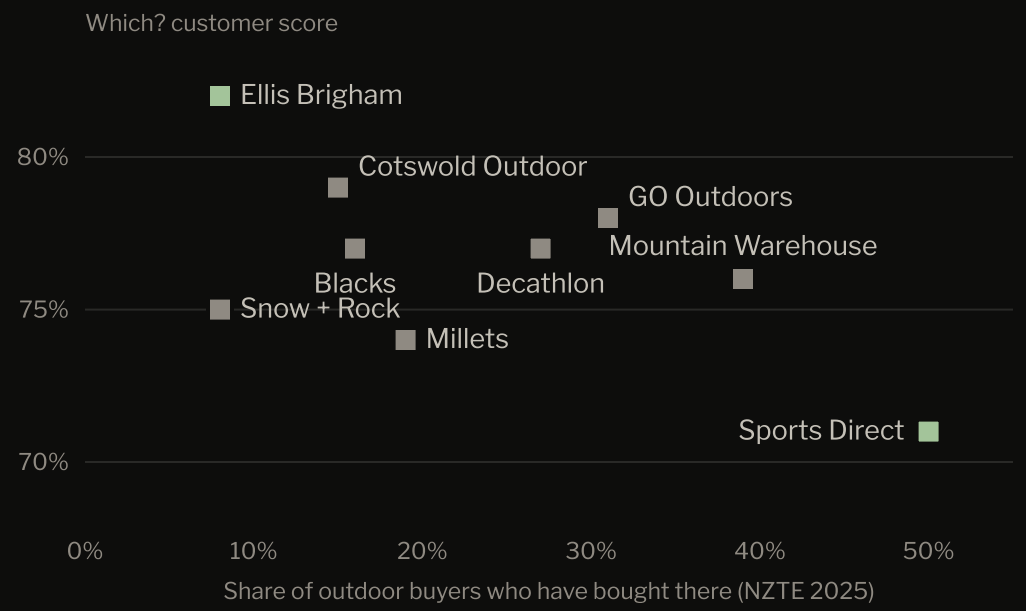
Set delivery thresholds by category: lower for nutrition and socks, standard for shoes.

Measure: full-price sell-through, average discount, contribution per order.

Profit lens: on a 50% margin, a 20% discount needs 67% more units to earn the same contribution.

Channels: give each one a job.

The biggest outdoor retailers aren't the best rated



36% vs 23%

Outdoor buyers who've bought from a brand's website, against Amazon. NZTE 2025.

110 to 72

Cotswold Outdoor Group stores, 2019 to 2025.

Measure: contribution and full-price share by channel, not revenue alone.

For brands

Your own site for full price, newness, the full size range and customer data.

Specialists for fitting and credibility; big chains for reach on agreed terms; marketplaces only where you control price.

Fund in-store and on-site media with key retailers: Cotswold shops with screens sold 13.3% more Hoka units, in the supplier's own case study.

For retailers

Be the place for advice and range depth: specialists and brands selling direct top the Which? ratings.

Join the shop and the site: fitting shortlists, stock by store, and returns either way.

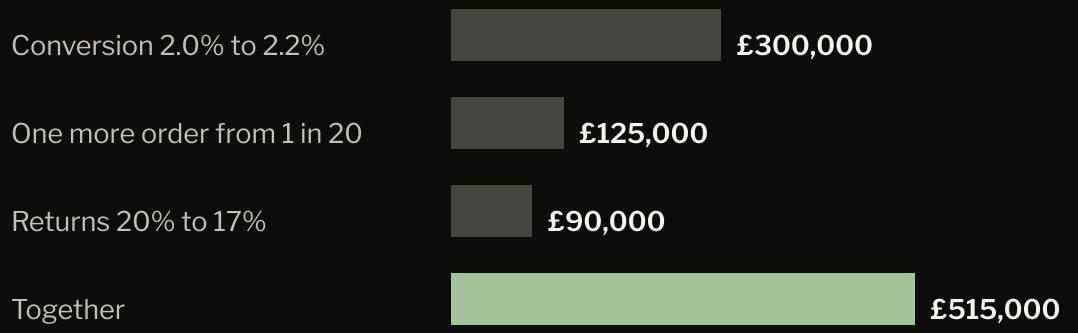
Sell media to brands as well as stock.

Profit lens: a channel that sells volume at a deep discount can cost more than it brings.

What small changes are worth to a £3m online brand.

An illustration with invented round numbers, not a result or a forecast: 1.2 million visits, converting at 2%, with a £125 average order.

Extra revenue a year, on the same traffic



Revenue before costs, and before returns on the extra orders: 17% growth without more advertising. The arithmetic: 24,000 orders from 20,000 customers; 2,400 more orders at £125; 1,000 more repeat orders; 3% of £3m gross sales kept rather than refunded.

None of these needs more advertising. They come from the same visitors and the same customers, so most of the gain reaches profit.

The Growth Review works out which changes are realistic for a particular business, from its own sales, costs and customer data, and ranks them by the profit at stake.

What I'd do in the first ninety days.

For a £1m to £10m outdoor or trail brand selling online. The order matters: find the money before spending more to chase it.

Month one

Find where the money is

- Contribution by product, channel and customer, after discounts, returns and media
- Baselines for conversion, returns by reason, and repeat rate
- Check the tracking; read the reviews and return notes
- Two questions after every order: where they first saw it, and why they bought here

Month two

Fix the leaks

- Rebuild the top twenty product pages: terrain, width, fit against the last version, reviews
- Delivery and returns shown up front; free size exchange first
- Brand and model search covered; discount rules written down
- Stop the spend that only reaches existing customers

Month three

Build what compounds

- Email and SMS flows: welcome, replacement, race calendar, care
- Two tracked acquisition tests, such as a podcast and a club partnership
- A job for each channel: own site, specialists, chains, marketplaces
- A twelve month plan, with the numbers it should move

Eight questions to ask of your ecommerce this quarter.

If the answer to any of these is "not sure", that's where the profit is hiding.

The question	Why it matters in the UK trail market	Lever
Do you know the contribution per order of your top products, after discounts, returns and media?	Up to half of UK sports shoe listings are on sale. The bestseller is often not the earner.	Margin
What share of your sales is at full price, and which way is it moving?	UK footwear prices have been below a year earlier every month since April 2025.	Margin
Do your product pages answer fit: terrain, width in millimetres, and change from the last version?	37% of runners aren't sure they wear the right shoe, and fit is the top reason shoppers return (57.6%).	Conversion
How many of your returns become size exchanges rather than refunds?	66.1% of shoppers respond well to being offered an exchange.	Conversion
What share of last year's customers bought again, and do you prompt the replacement?	54% of outdoor buyers were replacing worn-out kit, but only 17% of runners change shoes yearly.	Retention
Is your paid social reaching new customers, at the ages you sell to?	27% trust social ads, and 9% of over-55s.	Acquisition
Do you own the search results for your brand and model names?	59% trust search engine results, and nearly half of searchers don't spot the paid ones.	Acquisition
Does each channel have a clear job, judged on contribution rather than revenue?	Sports Direct reaches half of outdoor buyers and comes last on customer score.	Channels

The evidence behind this.

This is the short edition. The full edition adds 48 slides of UK evidence, every figure sourced and checked: the buyer, race kit rules, discovery and trust, retailers, prices and returns.

I'm Jason Millward: five years at inov-8, then Head of Ecommerce at Naturewall and CafePod. Scale and Summit gives outdoor, cycling and fitness brands senior ecommerce leadership: a Growth Review, strategy and advisory, or a fractional Head of Ecommerce.

Find out where to focus first.

The Growth Review turns your own sales, costs and customer data into three priorities and a ninety day plan.

Ask about a Growth Review

scaleandsummit.com hello@scaleandsummit.com