

Intelligent Investment

UK Retail Generational Survey 2026

REPORT

CBRE RESEARCH
MAY 2026

CBRE



Introduction

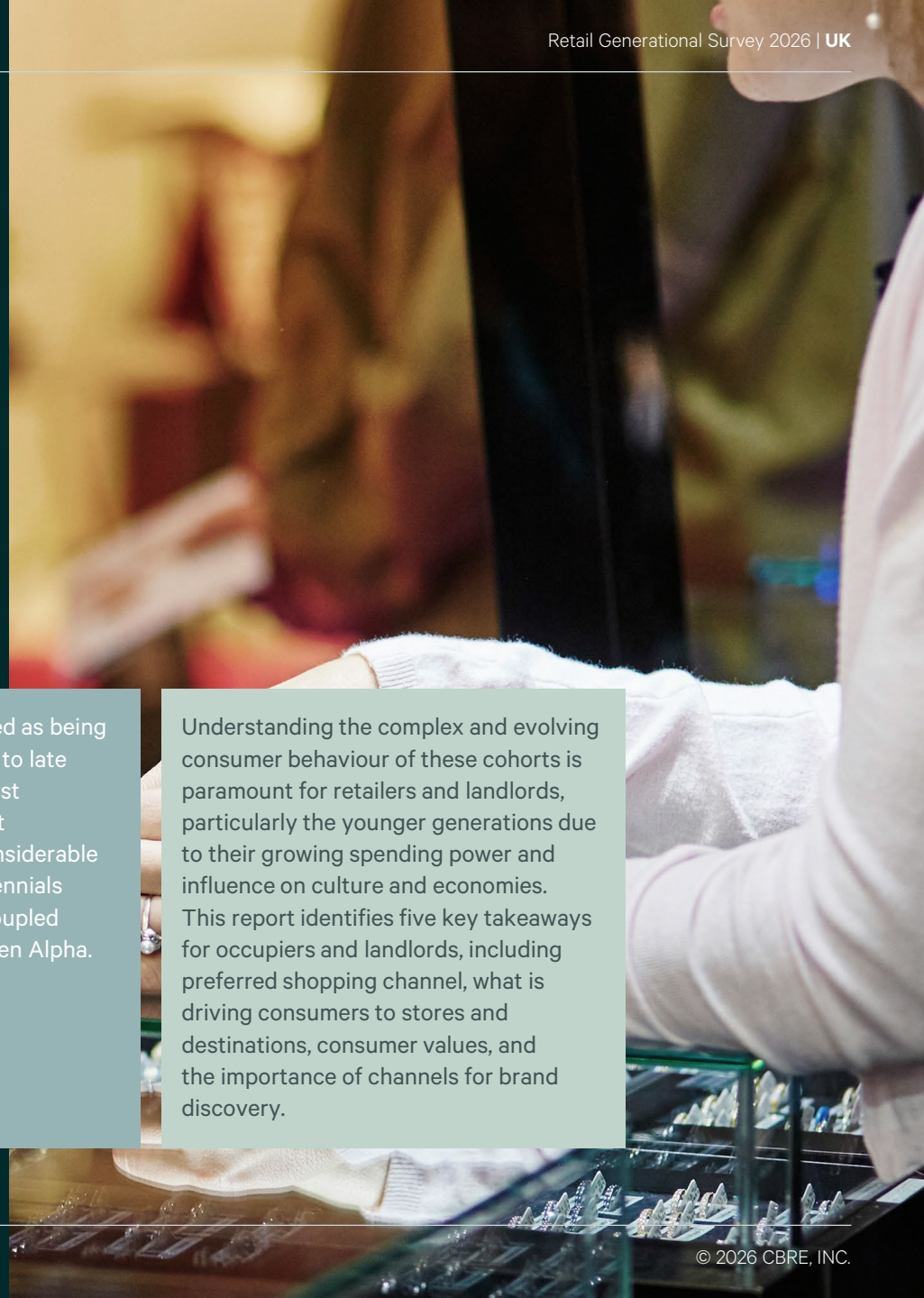
The CBRE UK Retail Survey 2026 delves into the evolving landscape of consumer behaviour, drawing insights from 2,000 respondents across three generations: Gen Alpha, Gen Z, and Millennials. By focusing on these cohorts, the report captures both current behaviours and emerging trends shaping the retail market, providing insights for landlords and retailers.

Gen Alpha describes the generation of people born between 2010 and 2025, largely comprising the children of Millennials. Despite the oldest members of this cohort being just 16 years old, they are already influencing the retail sector – through direct engagement with brands both online and offline, and by actively shaping household spending decisions. For the purposes of this survey, we have included respondents aged between 14-15 years old.

Preceding Gen Alpha, Gen Z stands as the first truly “digital native” generation, growing up with the internet, social media, and smartphones. This has significantly influenced their shopping habits and expectations. As this cohort spans from preteens to late 20s, we split respondents into Younger Gen Z (16–22-year-olds) and Older Gen Z (23–28-year-olds). With approximately 12.7 million Gen Z individuals in the UK as of the last census in 2021, their collective influence on retail is substantial and growing.

Millennials are typically defined as being born between the early 1980s to late 1990s and represent the largest consumer group. Their market significance is drawn from considerable spending power as many Millennials enter higher-earning years, coupled with their role as parents to Gen Alpha.

Understanding the complex and evolving consumer behaviour of these cohorts is paramount for retailers and landlords, particularly the younger generations due to their growing spending power and influence on culture and economies. This report identifies five key takeaways for occupiers and landlords, including preferred shopping channel, what is driving consumers to stores and destinations, consumer values, and the importance of channels for brand discovery.



Key findings

01

In-store remains the most preferred route to purchase, particularly for the younger generation, and product range is the leading driver of store visits. This reinforces the relevance of flagship and destination stores that cater to demand for greater choice and discovery.

02

Retailers should continue to invest in experience-led stores as store aesthetic, in-store events, and content creation opportunities are important for consumers. This is mainly driven by the younger generation seeking in-person experiences.

03

Tenant mix curation must evolve in line with how consumers choose to spend their leisure time. Eating out is the leading free-time activity, with cinema visits and sports & fitness also popular. This reinforces the growing role of experiential and leisure-led anchors within retail destinations.

04

Consumers value cost and convenience the most with delivery costs the biggest barrier to online shopping, followed by delivery timings. In-store retail can help alleviate these pressures, enabling faster access to products at a lower cost as well as supplementing online through click-and-collect.

05

TikTok is the most important channel for brand discovery reinforcing its growing importance within brand and destination marketing strategies. Over half of consumers have made a purchase based on an influencer recommendation.



A man with curly hair and a beard, wearing a dark blazer, is looking at a garment in a clothing store. He is holding a black shopping bag. The background shows racks of clothes and a warm, dimly lit interior.

01

In-store is the preferred channel

In-store remains the most preferred route to purchase, particularly for the younger generation, and product range is the leading driver of store visits. This reinforces the relevance of flagship and destination stores that cater to demand for greater choice and discovery.

Preference for in-store retail

Almost two-thirds of all respondents prefer buying products in-store. This is highest amongst the younger generation, with Younger Gen Zs leading the way for physical retail preference.

When asked which method of shopping is preferred across the different product categories, in-store was favoured for all except Gifts and Electronics. Furthermore, all product categories saw an increase in in-store preference when compared to the UK responses of [CBRE's 2022 Live-Work-Shop Survey](#). Gen Alpha has the highest preference for purchasing Clothing & Footwear in-store. This could be a result of this generation having more free time than older consumers and view shopping as more of a social activity.

WHAT LEADS CONSUMERS TO THE STORE?

Product range is the leading driver of store visits across all generations. This reinforces the relevance of the trend towards flagship and destination stores that cater to demand for greater choice and discovery. Full range stores are particularly valuable to the fashion and beauty segment, where consumers can try the product before they purchase.

56%

of respondents cited product range as a key driver of store visitation, making it the top factor across all generations

Source: CBRE Research

Figure 1: To what extent do you agree with the following statement? I prefer buying products in-store

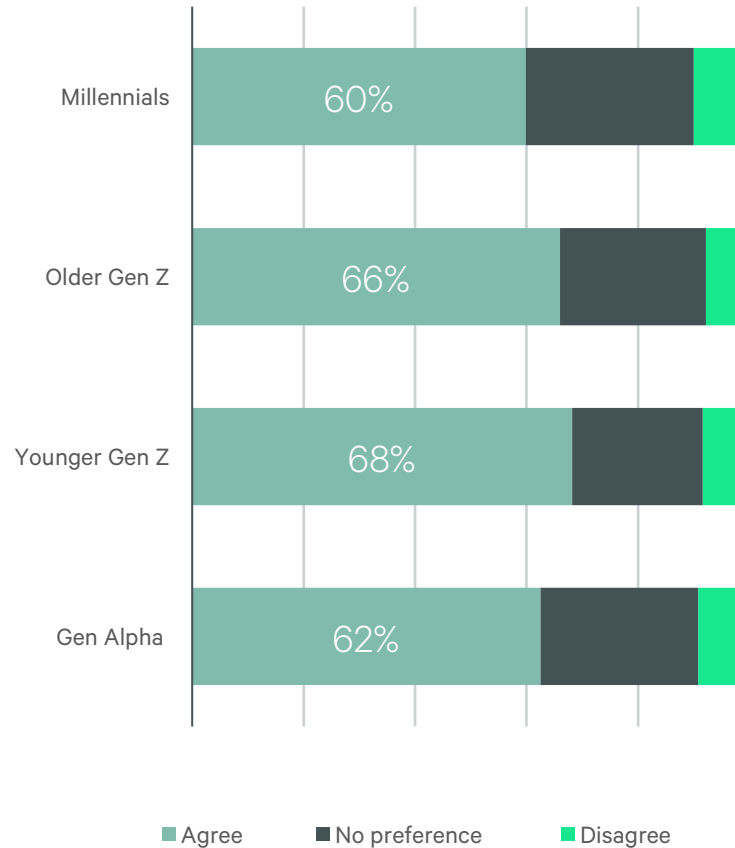
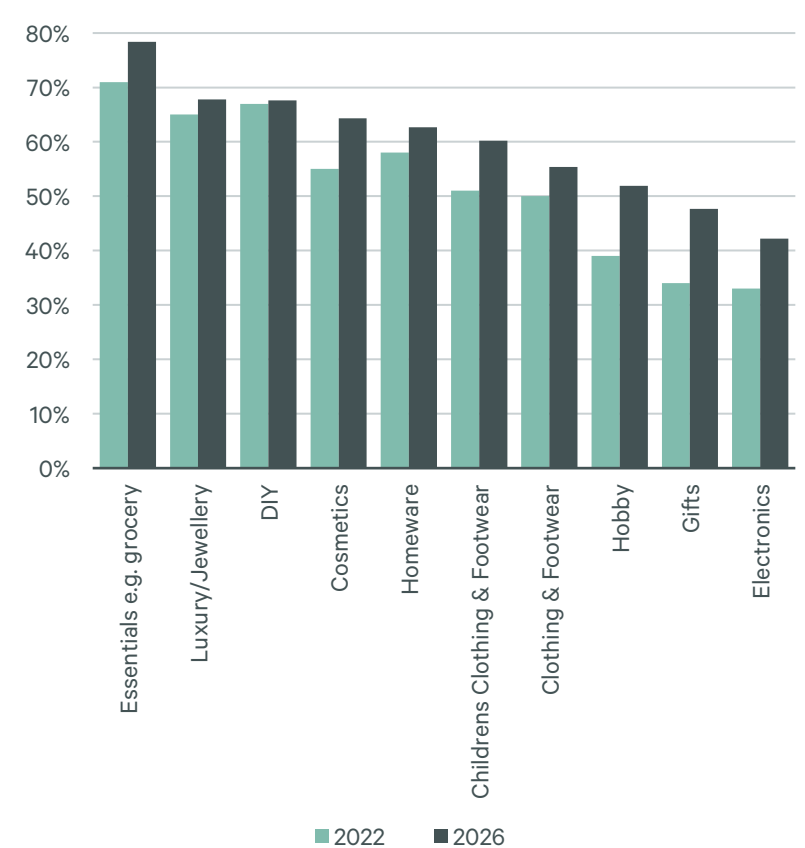


Figure 2: Which method of shopping do you prefer for the following types of products? (for those that have a preference and answered in-store)





02

Invest in experiential-led retail

Retailers should continue to invest in experience-led stores such as through innovative store design and hosting events to attract consumers, particularly the younger generation.

Experiential-led retail

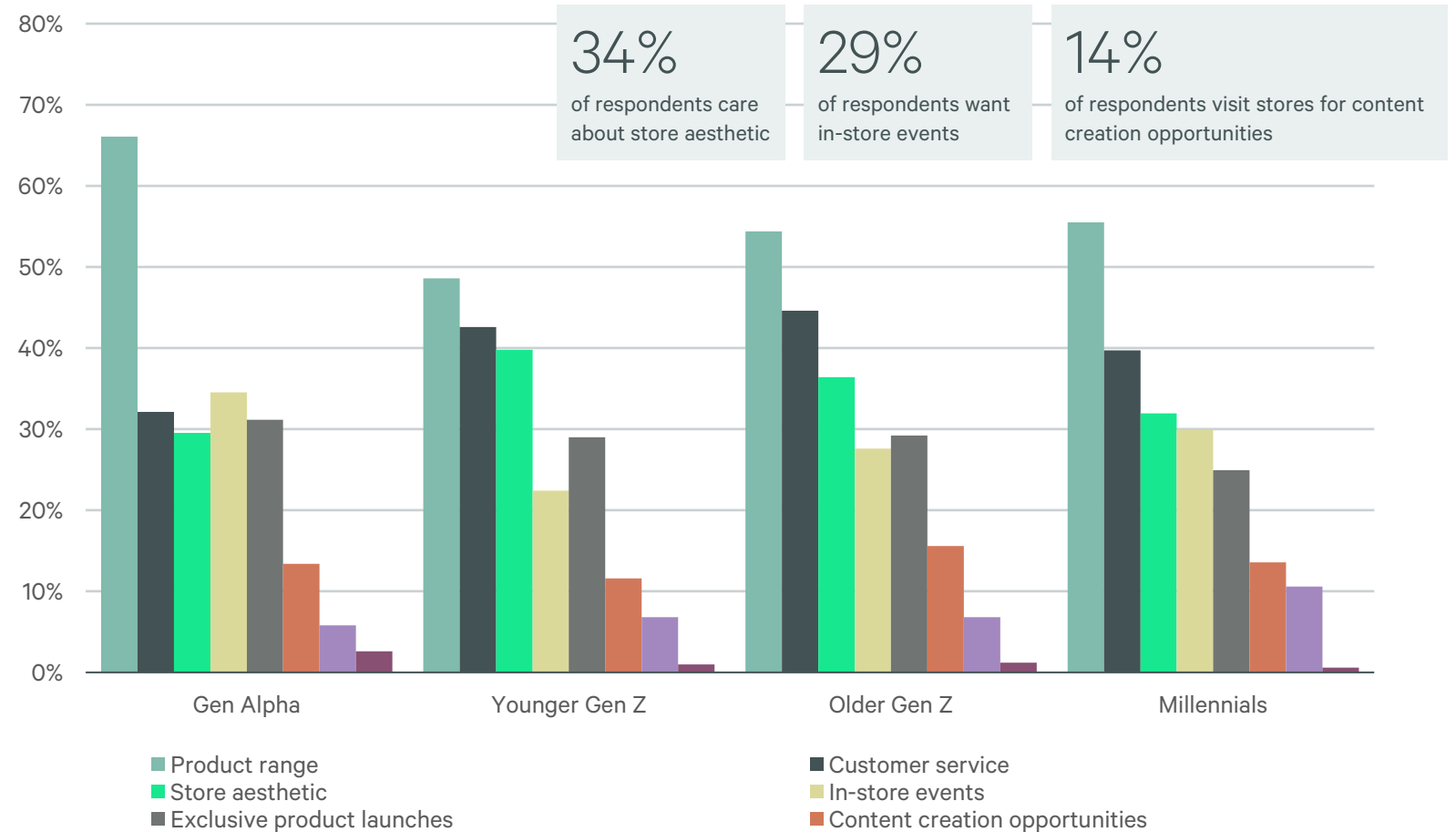
While product range and customer service are the most important drivers to the physical store, the survey results show experiential-led store features are also valuable to consumers.

Store aesthetic is the third most important factor overall, and is particularly appealing to Gen Z. A well-designed store is a crucial strategic investment as it can help to convey a brand’s identity, amplify its visibility, and engender consumer loyalty.

In-store events and exclusive product launches also over-index for Gen Alpha, suggesting receptivity to curated, event-led retail formats. For example, retailers that encourage interaction through concepts such as gamification, interactive product trials, or rotating pop-ups can enhance younger generations’ connection with a brand and drive repeat visits.

These results highlight that consumers want visually appealing and interactive shops. [Additionally, curating unique spaces can lead to consumers sharing their experiences via social media, the biggest driver of brand discovery.](#) 1 in 7 consumers now seek content creation opportunities when visiting a store.

Figure 3: What would make you want to visit a physical store (Select all that apply)



Source: CBRE Research



03

Importance of tenant mix curation

Tenant mix curation must evolve in line with how consumers choose to spend their leisure time. Eating out is the leading free-time activity, with cinema visits and sports & fitness also popular. This reinforces the growing role of experiential and leisure-led anchors within retail destinations.

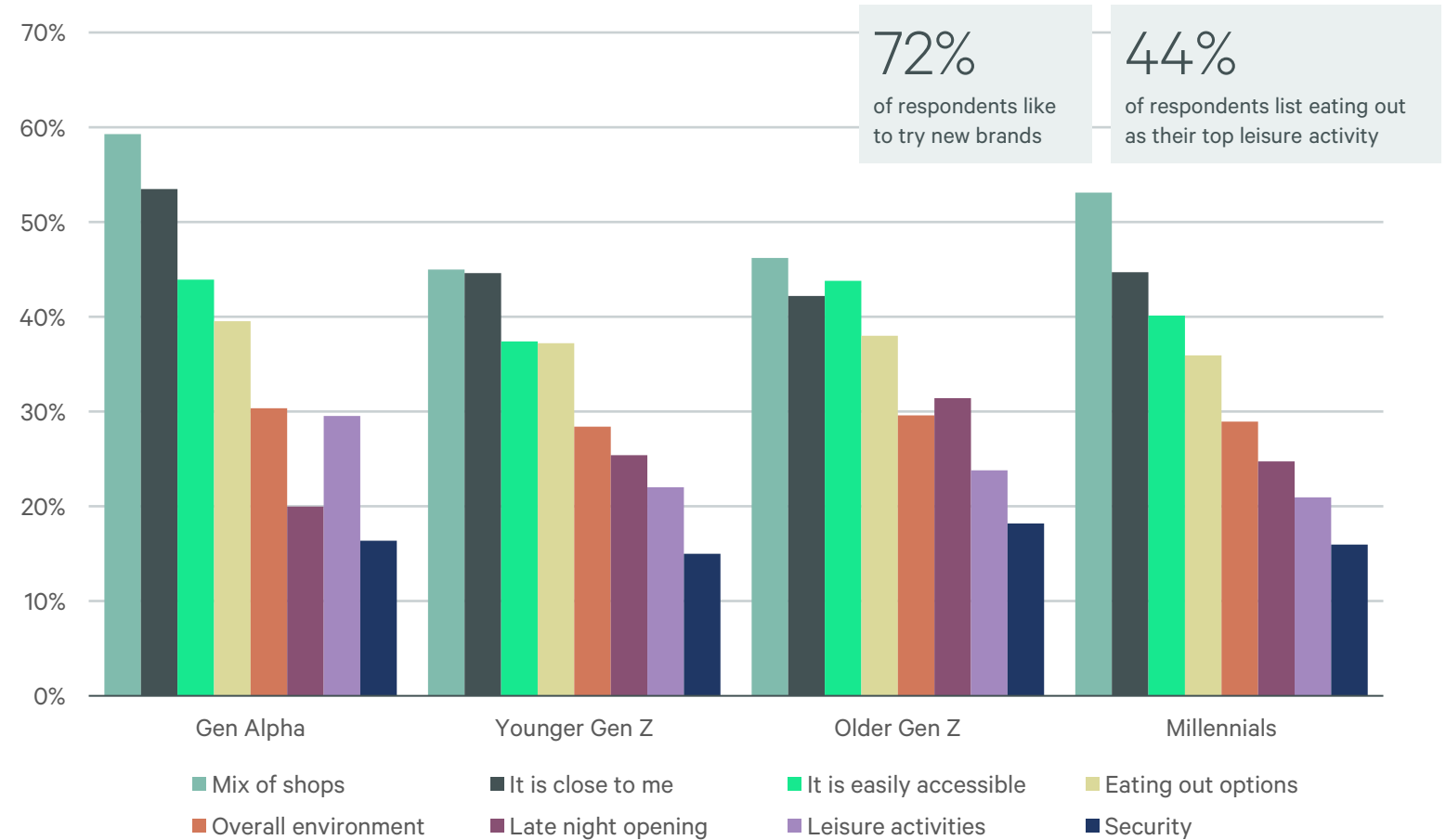
Tenant mix curation

The top factor driving consumers to retail destinations is the tenant mix. Therefore, landlords should prioritise leasing to complementary tenants and evolve the retailer mix in response to consumer trends and popularity. Making space for emerging and independent brands is important, supported by 72% of respondents citing they like to try new brands, and most popular amongst the youngest consumers. As trends change rapidly fuelled by social media, brands that gain popularity often pursue aggressive expansion, aiming to secure the best sites at competitive rents while demand is high. These leases could therefore be more flexible, driven by the need for agility. This is supported by our recent analysis of [prime shopping centre leasing metrics](#). While lease length has remained stable in recent years, the market has become more comfortable with break clauses.

Landlords should also curate destinations in line with how consumers choose to spend their leisure time. Outside of the convenience-led factors of proximity and accessibility, eating out emerges as the fourth most important factor. This is also the leading free-time activity for respondents, followed by cinema visits and sports & fitness. Key generational differences include Older Gen Z preferring sports & fitness over going out for alcoholic drinks, whereas Younger Gen Z and Millennials are the opposite. Gen Alpha show a stronger preference for the cinema, events, and competitive socialising (non-drinking activities). These results reinforce the growing role of experiential and leisure-led anchors within retail destinations. A wide range of food & beverage, leisure, and health and wellness will optimise retail destinations.

Source: CBRE Research

Figure 4: What factors would influence your decision to spend time at a retail destination? (Select all that apply)





04

Value of cost and convenience

Consumers value cost and convenience the most, with delivery costs the biggest barrier to online shopping, followed by delivery timings. In-store retail can help alleviate these pressures, enabling faster access to products at a lower cost as well as supplementing online through click-and-collect. Additionally, the store allows for product sizing and quality checks, which is valued across all generations.

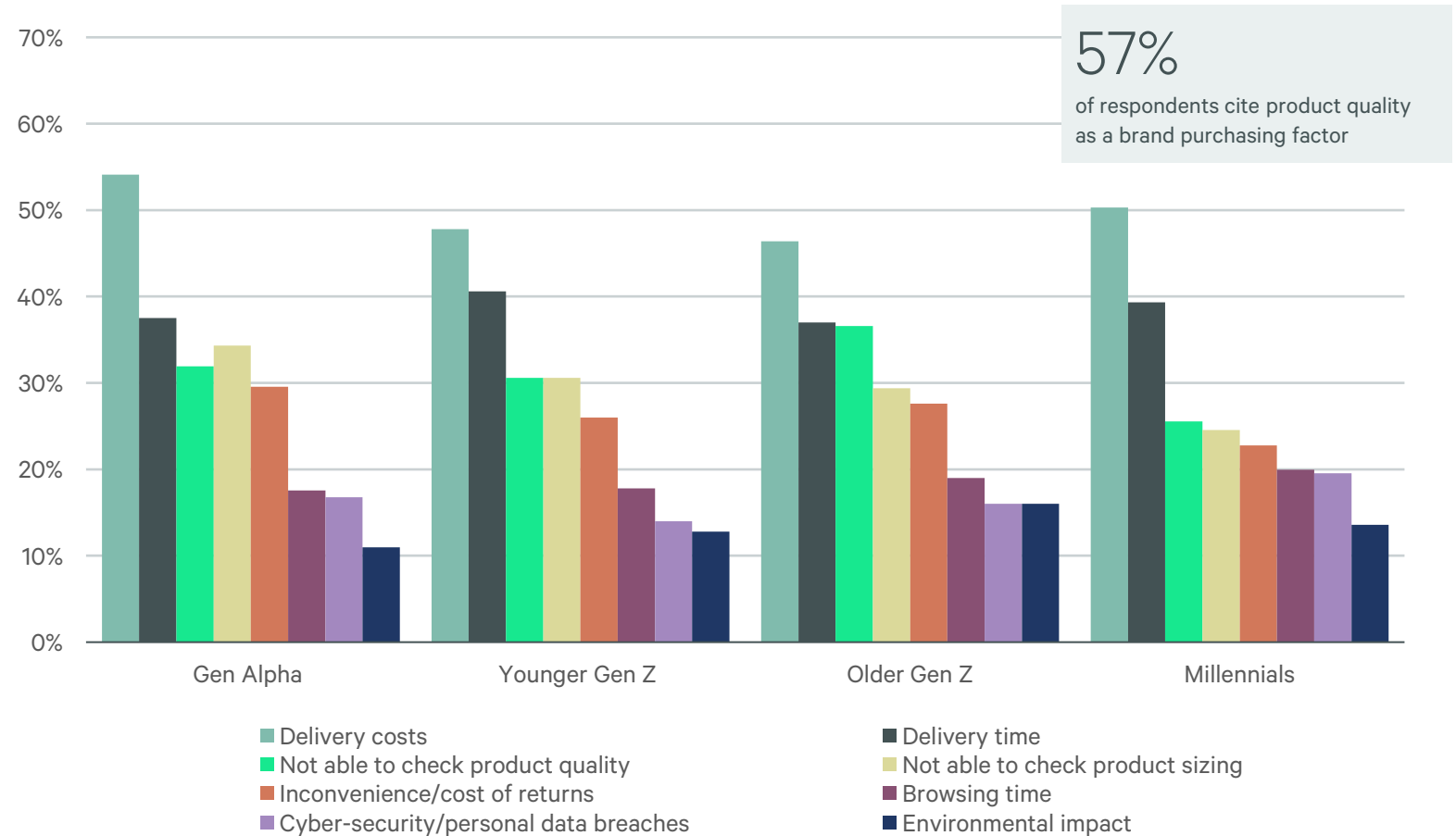
Factors that deter online shopping

Delivery costs are the biggest barrier to online shopping, followed by delivery timings. In-store retail can help alleviate these pressures, enabling faster access to products at a lower cost, either via direct purchases or click-and-collect services. Retailers should therefore ensure in-store product prices are competitive with any online discounts.

Not being able to check product quality and sizing are also significant deterrent factors for online shopping, particularly for the youngest generations. Product quality was listed as the most important factor when purchasing from a brand, selected by 57% of respondents. In-store experiences will help develop consumer confidence in a brand’s product quality. Investment in the fitting room technology – for example through smart mirrors – will also optimise the consumer journey and help to improve overall satisfaction.

The environmental impact of online shopping is cited by 13% of respondents as being a limiting factor, though this is low compared with other drivers. However, when asked about which channel is better for the environment, in-store is perceived as being greener.

Figure 5: What factors would be most likely to limit the amount of online shopping you do? (Select up to 3)



Source: CBRE Research



05

Social and community credibility for brands

TikTok is the most important channel for brand discovery, particularly for Gen Z, whose purchasing decisions are most influenced by influencers. This emphasises the importance of social media strategy for occupiers and landlords.

Brand discovery

TikTok is the most important channel for brand discovery with almost half of respondents listing it as a top three channel. It is particularly popular amongst Gen Z consumers, especially Younger Gen Z (63%). This emphasises the importance of creating social media-ready spaces in-store. Additionally, retailers must be aware of Gen Z-led expectations around social-to-shelf speed, as well as the often-short window in which products or brands trend.

Over half of respondents have purchased a product based on an influencer recommendation led by Younger Gen Z (67%). Unsurprisingly there has been a rise in influencer-led brands, many of which are expanding into physical retail. Landlords should continue to allow space for pop-ups for DTC brands trialling physical space, either as a standalone unit or as a concession.

Additionally, for Gen Z there isn't a significant difference between AI search and traditional advertising, which indicates this is a newly emerging channel with growing usage.

Gen Alpha place greater emphasis on word of mouth for brand discovery, as well as brand popularity in purchase decisions, highlighting the importance of social peers for this age group.

When purchasing from a brand, all generations value customer reviews after product quality and price. Social media reviews therefore play an important role in helping consumers assess quality and value.

Figure 6: Where are you most likely to discover new brands? (Select up to 3)

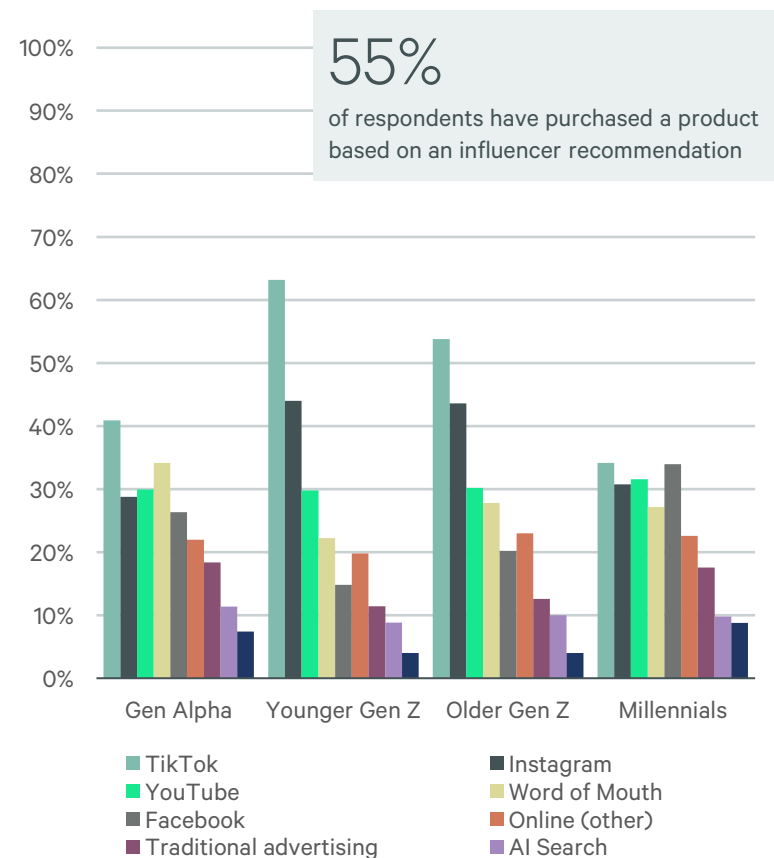


Figure 7: What's most important to you when purchasing from a brand? (Select up to 3)



Source: CBRE Research

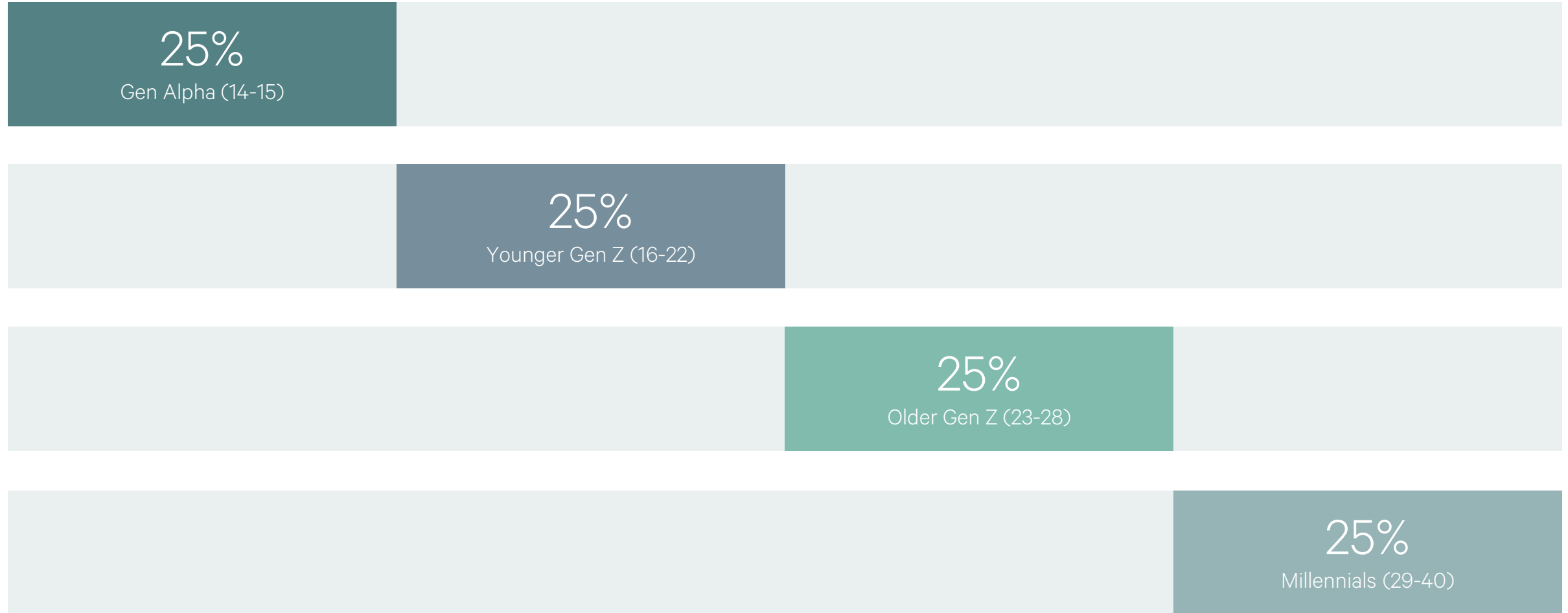


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Respondent Profile

Respondent Profile

The survey was conducted by Censuswide between 24 March and 2 April 2026, with 2,002 respondents aged 14–44.



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