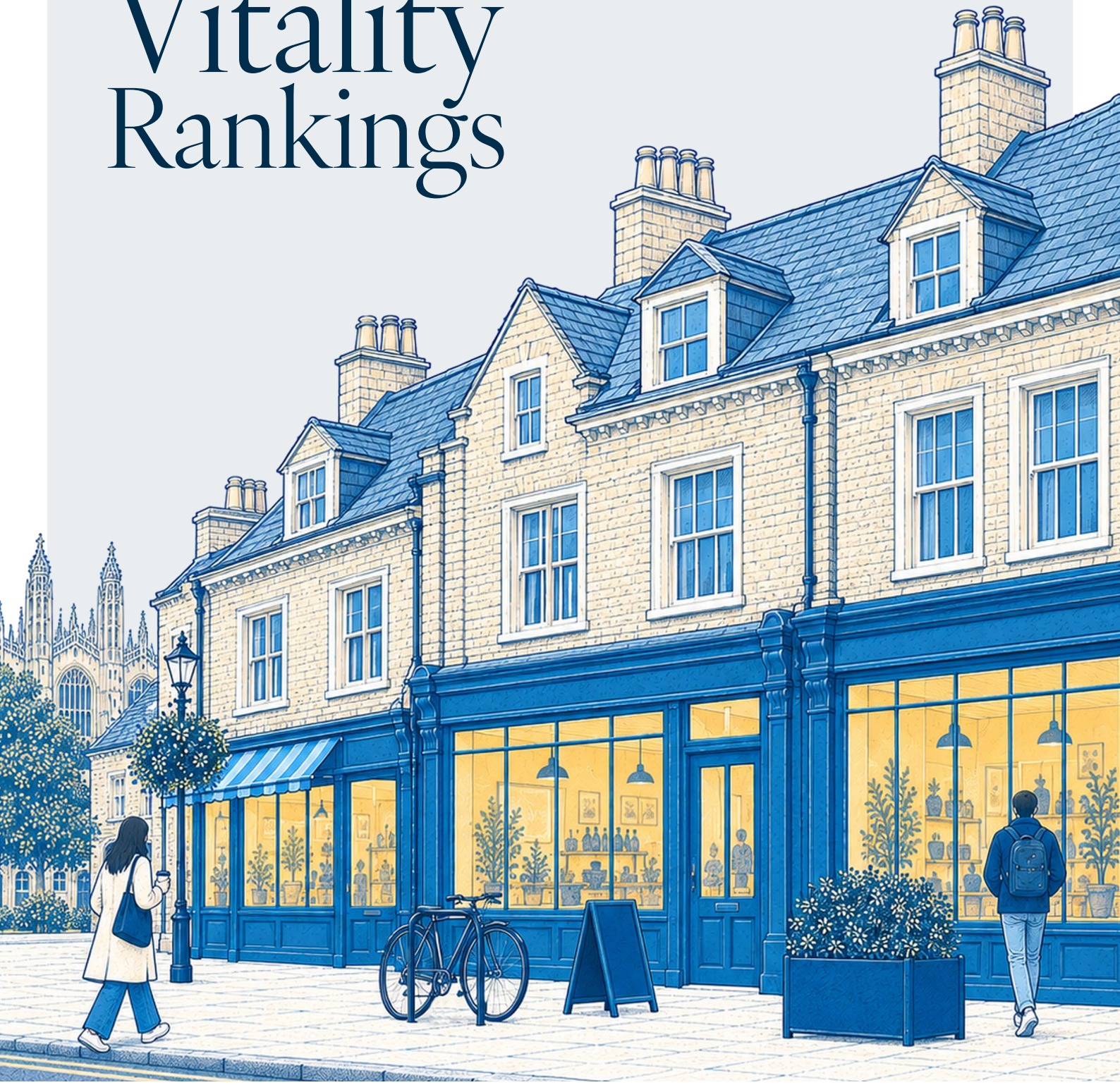
NEWMARK

the Retail Vitality Rankings



DATA-LED INSIGHT INTO THE UK RETAIL LANDSCAPE

EDITION 001 — 2026

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Foreword

Small indulgences are reshaping retail destinations.

Consumer demand for small luxuries and self-gifting are giving some locations the edge over their competitors. Large centres and luxury destinations in particular are benefitting.

In this year's Retail Vitality Rankings, we are seeing larger centres regain ground, with city centres, larger towns and out-of-town malls benefiting from changing consumer and tenant behaviour. For shoppers, both the quality and quantity of the offer are becoming increasingly important.

Many retailers are focusing their expansions on larger stores in established destinations, where stronger footfall, longer dwell times and a wider tenant mix can support better trading performance. The growth of destination retail and location-based entertainment is also helping centres to give customers more reasons to stay longer and spend more.

We are also seeing continued momentum in categories linked to affordable indulgence.

Beauty, gifting and collectables are benefiting from consumer demand for accessible treats and self-gifting, while wellness and health brands continue to expand, taking prominent space on high streets and in shopping centres. These sectors are highly competitive, with social media accelerating consumer awareness and increasing demand for new concepts and standout locations.

Travel hubs are emerging as stronger retail locations. Stations that have benefited from investment, particularly those connected to strong retail, food and leisure offers, are increasingly acting as destinations in their own right. Elsewhere, the reuse of vacant or obsolete retail space is helping to drive the revival of some weaker centres, with public and private-sector partnerships often playing an important role.

Luxury destinations such as Knightsbridge continue to rank highly despite wider global headwinds of reduced consumer spending power and the UK's challenges around international luxury shoppers following changes to VAT free shopping. However, these locations are supported by continued customer interest in their evolving tenant mixes – a trend that also helps the larger retail centres.

David Harper

Managing Partner,
Head of UK Retail

Social media is accelerating consumer awareness and increasing demand for new concepts and standout locations.

David Harper

1000

RETAIL CENTRES WERE ASSESSED FOR THE 2026 RETAIL VITALITY REPORT

+254

BIGGEST SINGLE-YEAR RISE 26'

+5

CENTRES CLIMBED THE TOP 50

Introduction

The shift in spending behind this year's rankings.

Andy Metherell

Head of Consultancy & Analytics

Newmark's Consultancy & Analytics team create the UK Retail Vitality Rankings on an annual basis to report on the retail health of 1,000 standalone malls, city and town centres across the country.

To account for evolving consumer demands, occupier behaviour and place-management strategies, we employ a multi-variate analysis. This recognises the fact that no one factor dictates the success of retail centres, and many elements are taken into account by visitors and commercial businesses when making their decisions.

New variables added to our analysis this year are the presence of health & beauty and gifting/collectables floorspace. These categories reflect consumers' desire for self-gifting little luxuries at a time of increasing pressure on their wallets. They also demonstrate the influence of social media on product requirements, as well as the growth of both beauty brands and health organisations on our high streets.

Entertainment services and catering floorspace remain key to retail destinations, given their value as differentiators against online retail. Therefore, we have increased their impact accordingly, whilst the core variables of vacancy, market size and offer suitability still have a significant impact on centre vitality scoring.

The 2026 rankings are also driven by occupiers taking larger floorplates – or upsizing existing stores - in larger retail centres. These bigger units provide the opportunity for tenants to enhance customer engagement via exciting shopfits that coordinate with their online marketing. They also provide space for the display of a broader product range.

Several of the small affluent centres have fallen in the rankings as the larger centres surge. However, they retain their position in the top 50 and are still benefitting from home working and localised shopping patterns.

Top 50 Retail Centres

A look at the country's highest-ranking retail destinations.

Cambridge City Centre and Chelsea – King's Road have maintained their top spots in the 2026 Newmark Retail Vitality Rankings, continuing to benefit from affluent catchments, strong visitor appeal and well-established retail, dining and leisure offers.

SHOPPER SPEND PA

£18bn
LONDON WEST END

£5.4bn
GLASGOW

£4.5bn
BIRMINGHAM

Cambridge has retained its top spot. This is supported by its historic core, where retail floorspace is tightly constrained, alongside a highly affluent catchment and a robust evening economy. Chelsea's strength, meanwhile, reflects its premium retail and leisure mix around King's Road and Sloane Square.

Larger city centres have overall climbed the rankings this year. Manchester City Centre rises nine places to third, Edinburgh climbs ten places to fifth and Liverpool moves into seventh. Glasgow records one of the strongest gains in the top 25, up 20 places to eleventh.

This points to stronger demand for major urban destinations that can combine flagship retail with a broader day-to-evening offer.

Shopping centres have performed well in this year's rankings, with several recording encouraging gains. Trafford Centre and Westfield London both rise seven places, while Westfield Stratford City continues to hold a strong top-12 position. Bluewater also remains a leading destination, ranking thirteenth this year.

Centres with a strong retail core are particularly well positioned to attract both local spend and wider visitor expenditure. This is especially true where they are supported by experience-led uses, food and beverage offerings, and a clear sense of place.

2026		2025	↑↓
1	Cambridge City Centre	1	0
2	Chelsea - King's Road	2	0
3	Manchester City Centre	12	↑9
4	Knightsbridge	8	↑4
5	Edinburgh City Centre	15	↑10
6	Kingston upon Thames	3	↓3
7	Liverpool City Centre	11	↑4
8	Leeds City Centre	9	↑1
9	Bath City Centre	4	↓5
10	Trafford Centre	17	↑7
11	Glasgow City Centre	31	↑20
12	Westfield Stratford City	10	↓2
13	Bluewater	5	↓8
14	Oxford City Centre	20	↑6
15	Milton Keynes City Centre	7	↓8
16	Westfield London	23	↑7
17	Brighton City Centre	14	↓3
18	Wimbledon Village	6	↓12
19	Richmond	13	↓6
20	Kensington High Street	16	↓4

Affluent smaller centres hold their ground, while regional destinations surge.

Looking further into the rankings, smaller affluent locations have remained in the top 50 of the rankings. Cobham, Wimbledon and Guildford benefit from high-spending local catchments and a strong blend of retail, hospitality and leisure. Their appeal is supported by regular local spend and a clear sense of place, rather than reliance on comparison shopping alone.

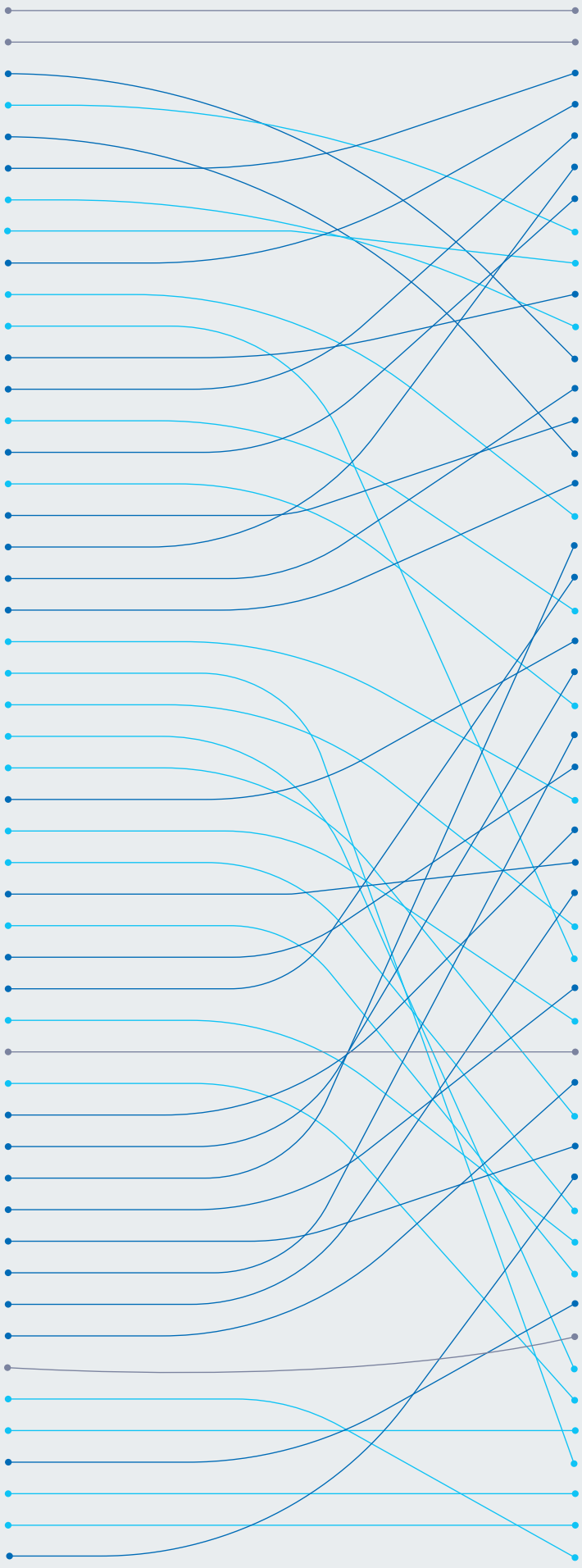
Several locations have also recorded notable gains. MetroCentre rises 52 places to 45th, while Leamington Spa climbs 24 places and Shrewsbury improves by 11 places. Their progress reflects the importance of a rounded retail, leisure and hospitality offer.

Transport hubs also perform well, with King's Cross, London Bridge and Clapham Junction all featuring in the top 50. Their high levels of daily passenger footfall, alongside growing residential and worker populations, support a broad mix of convenience retail, F&B, and leisure offer.

A number of locations that featured in the top 25 last year now sit within the 26–50 rankings, including Cobham, Harrogate, St Albans, Marlborough, Berkhamsted and Reigate. This reflects the competitive nature of the rankings, with relative movement driven both by changes in individual centre performance and by stronger gains elsewhere.

2026		2025	↑↓
21	York City Centre	26	↑5
22	Sloane Street	58	↑36
23	Chester City Centre	30	↑7
24	Birmingham City Centre	46	↑22
25	Victoria Street	36	↑11
26	Cobham	21	↓5
27	Clapham Junction	33	↑6
28	Wimbledon	39	↑11
29	King's Cross	28	↓1
30	Shrewsbury	41	↑11
31	Harrogate	25	↓6
32	St Albans	19	↓13
33	London Bridge	40	↑7
34	St Ives (Cornwall)	34	↑0
35	Guildford	49	↑14
36	Nottingham City Centre	27	↓9
37	Marlborough	22	↓15
38	Berkhamsted	18	↓20
39	Hampstead	32	↓7
40	Canary Wharf	37	↓3
41	Reigate	24	↓17
42	Cribbs Causeway	29	↓13
43	Islington - Upper Street	35	↓8
44	Brent Cross	44	0
45	MetroCentre	97	↑52
46	Bristol - Clifton	51	↑5
47	Marlow	43	↓4
48	London West End	59	↑11
49	Leamington Spa	73	↑24
50	Muswell Hill	38	↓12

Down Up No change



2026 RANK		2025 RANK		
1	Cambridge City Centre	1	Cambridge City Centre	— 0
2	Chelsea - King's Road	2	Chelsea - King's Road	— 0
3	Manchester City Centre	3	Kingston upon Thames	↓ 3
4	Knightsbridge	4	Bath City Centre	↓ 5
5	Edinburgh City Centre	5	Bluewater	↓ 8
6	Kingston upon Thames	6	Wimbledon Village	↓ 12
7	Liverpool City Centre	7	Milton Keynes City Centre	↓ 8
8	Leeds City Centre	8	Knightsbridge	↑ 4
9	Bath City Centre	9	Leeds City Centre	↑ 1
10	Trafford Centre	10	Westfield Stratford City	↓ 2
11	Glasgow City Centre	11	Liverpool City Centre	↑ 4
12	Westfield Stratford City	12	Manchester City Centre	↑ 9
13	Bluewater	13	Richmond	↓ 6
14	Oxford City Centre	14	Brighton City Centre	↓ 3
15	Milton Keynes City Centre	15	Edinburgh City Centre	↑ 10
16	Westfield London	16	Kensington High Street	↓ 4
17	Brighton City Centre	17	Trafford Centre	↑ 7
18	Wimbledon Village	18	Berkhamsted	↓ 20
19	Richmond	19	St Albans	↓ 13
20	Kensington High Street	20	Oxford City Centre	↑ 6
21	York City Centre	21	Cobham	↓ 5
22	Sloane Street	22	Marlborough	↓ 15
23	Chester City Centre	23	Westfield London	↑ 7
24	Birmingham City Centre	24	Reigate	↓ 17
25	Victoria Street	25	Harrogate	↓ 6
26	Cobham	26	York City Centre	↑ 5
27	Clapham Junction	27	Nottingham City Centre	↓ 9
28	Wimbledon	28	King's Cross	↓ 1
29	King's Cross	29	Cribbs Causeway	↓ 13
30	Shrewsbury	30	Chester City Centre	↑ 7
31	Harrogate	31	Glasgow City Centre	↑ 20
32	St Albans	32	Hampstead	↓ 7
33	London Bridge	33	Clapham Junction	↑ 6
34	St Ives (Cornwall)	34	St Ives (Cornwall)	— 0
35	Guildford	35	Islington - Upper Street	↓ 8
36	Nottingham City Centre	36	Victoria Street	↑ 11
37	Marlborough	37	Canary Wharf	↓ 3
38	Berkhamsted	38	Muswell Hill	↓ 12
39	Hampstead	39	Wimbledon	↑ 11
40	Canary Wharf	40	London Bridge	↑ 7
41	Reigate	41	Shrewsbury	↑ 11
42	Cribbs Causeway	43	Marlow	↓ 4
43	Islington - Upper Street	44	Brent Cross	— 0
44	Brent Cross	46	Birmingham City Centre	↑ 22
45	MetroCentre	49	Guildford	↑ 14
46	Bristol - Clifton	51	Bristol - Clifton	↑ 5
47	Marlow	58	Sloane Street	↑ 36
48	London West End	59	London West End	↑ 11
49	Leamington Spa	73	Leamington Spa	↑ 24
50	Muswell Hill	97	MetroCentre	↑ 52

Macro Trends Reshaping Retail

UK retail is becoming more selective, experiential and location-led.

Will Chamberlain

Associate Director
New Business

The strongest destinations combine practical access with a compelling reason to stay.

Will Chamberlain

The UK retail sector is becoming more selective, experiential and location-led. Retailers are concentrating investment in the strongest destinations, while consumers continue to prioritise value, convenience and smaller moments of reward.

Prime Gets Pricier:
Retailers are consolidating into fewer, larger and more productive stores in high-footfall locations. Flagships now support sales, service, fulfilment and brand-building, intensifying demand for the best high streets and dominant regional destinations across the UK. The trend is visible across Oxford Street, where M&S has renewed its 100,000 sq ft Pantheon flagship, while New Era has committed to a 10-year lease for a prominent store near Selfridges.

Retail as a Day Out:
Shopping destinations are expanding beyond traditional retail. Food and beverage, leisure, wellness and family entertainment are becoming central to placemaking, driving longer dwell times and creating more frequent reasons to visit. The strongest schemes use leisure and hospitality as anchors rather than add-ons. SuperPark at Braehead provides family entertainment, while Westfield Stratford is building a dedicated dining zone around food, live music, and social occasions.

The Affordable-Luxury Economy:
Consumers are still value-conscious but continue to spend on accessible rewards. Beauty, gifting, collectables, premium confectionery, coffee and social food occasions are helping to drive frequent, discovery-led spending. Together, they are enhancing the vitality of destinations with a strong retail offer. In a selective spending environment, brands such as MINISO, Pop Mart, and PURESEOUL are benefiting from demand for discoverable, giftable, and shareable products that offer an accessible sense of reward.

The strongest destinations combine practical access with a compelling reason to stay. They offer retailers high-quality space, while giving consumers a broader choice of shopping, leisure, hospitality and services.

Prime Gets Pricier:
M&S's transformed flagship demonstrates the continued investment in large, high-profile stores that can trade, build brand awareness, and create a destination.

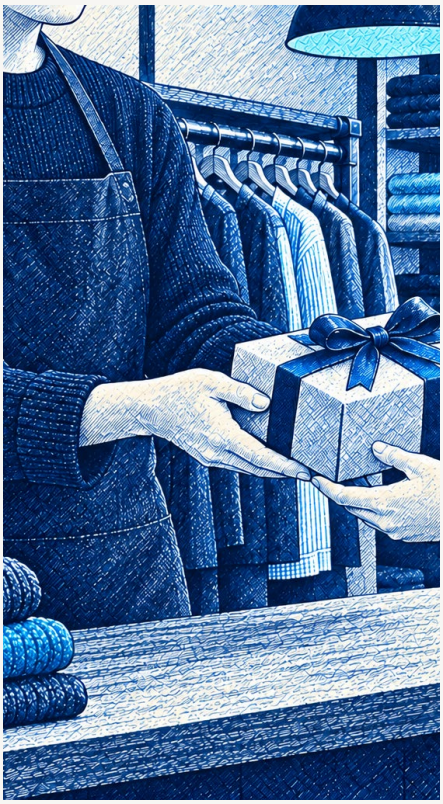
Retail as a Day Out:
The 30,000 sq ft SuperPark at Frasers Plus Braehead adds a major family-leisure draw, extending dwell time and supporting spend across Retail and F&B.

Affordable-Luxury Economy:
MINISO's continued rollout reflects demand for accessible beauty, gifting, licensed collectables and discovery-led purchases that provide an everyday treat.

Top 50 Retail Locations

A look at the regions and formats dominating the top 50.

The 2026 rankings continue to show a strong concentration of high-performing retail locations in London and the South East, particularly among larger, well-connected and experience-led destinations. Alongside established central London destinations, transport hubs such as King's Cross, Clapham Junction and London Bridge perform well.



The 2026 ranking points to a more concentrated retail market, in which dominant destinations are gaining an increasing share of retailer demand. London remains prominent, but leading regional locations also perform well where they offer the scale, catchment and sales potential required to support national and international brands.

Limited new supply and lower vacancy are supporting the strongest markets.

Physical retail remains important, but the economics of operating stores have become more demanding. This is driving occupiers to assess locations more closely on profitability and take a more data-led approach. Retailers are increasingly concentrating investment in locations that strengthen brand visibility, deliver strong customer reach and operational efficiency, with secondary locations likely to be reviewed.

Limited new supply and lower vacancy are supporting the strongest markets. In larger shopping centres, retailers are increasingly relocating within a scheme or taking larger units to refresh formats, consolidate stores or broaden their offer.

Where management and leasing are coordinated, landlords can assemble units and facilitate these moves more easily.

This is often more difficult on high streets. Fragmented ownership can make it harder to coordinate retailer moves, combine units and deliver wider improvements. While prime locations are better placed to attract investment and rental growth, secondary centres need to address outdated or surplus space through repurposing and other active asset-management.

CAMBRIDGE

5.9%

VACANCY, BELOW THE 14% NATIONAL AVERAGE

CHELSEA

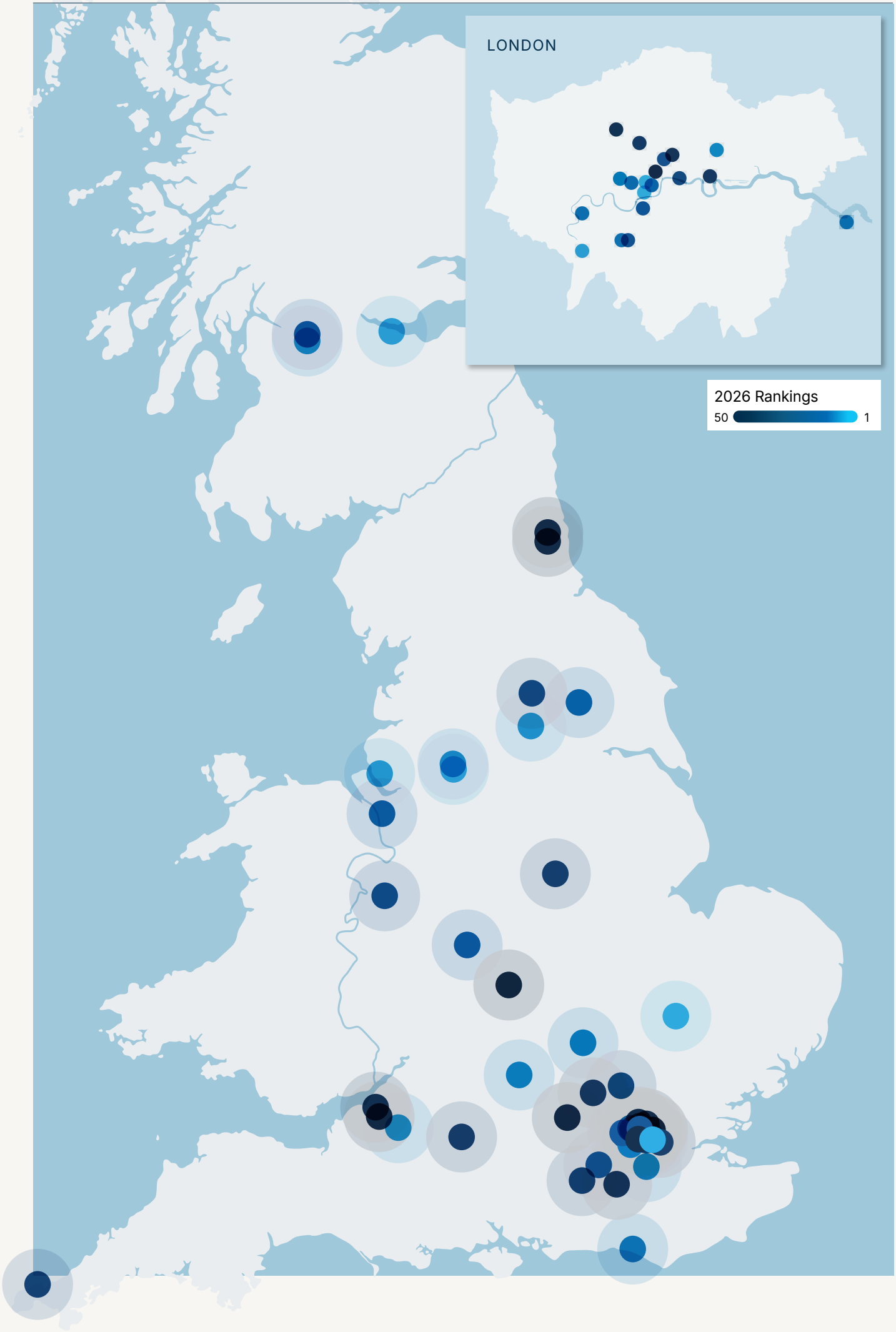
7.0%

HEALTH & BEAUTY

MANCHESTER

15.6%

ENTERTAINMENT SERVICES


LONDON
2026 Rankings
50
1

New Entrants

New entrants are absorbing prime space and driving rents higher.

James Ebel
Vice Chairman

Appetite from international brands, especially from North America, is reducing availability and increasing rents across prime pitches – especially in London.

We are continuing to see strong international appetite for retail space in London and across the UK. Retailer demand for prime locations is high, however supply is limited and, as a result, rents are being pushed up in the most sought-after areas.

For North American brands, the UK remains a natural first step for international expansion, given the similarities in consumer groups, spending habits and the wider retail environment. US operators remain very active, but there is also a noticeable increase in interest from Canadian brands at the moment.

London is still the number one entry point for brands looking to establish a European presence. Its scale, sophisticated consumer base and strong tourism offer significant brand-building opportunities. Increasingly, brands are also using their online sales and customer data to help determine where physical stores will perform best.

Demand for the West End's best streets remains strong, particularly Oxford Street, Regent Street, Bond Street, Covent Garden, Marylebone High Street and King's Road. Availability across these locations is now limited and competition is increasing for the right units in the prime streets.

Recent entrants include Garage, SKIMS, Restoration Hardware, Gentle Monster, Raising Cane's, KITH, Sephora and Edikted. These brands reinforce London's position as the key launch market for operators embarking on international expansion.

Case Study

Braehead Shopping Centre

Located in Renfrewshire, Scotland, Braehead Shopping Centre is one of the highest climbers in the 2026 Retail Vitality Rankings, rising 213 places to #261. The improvement follows Frasers Group's acquisition of the 1.1m sq ft destination in late 2025 and reflects a reduced vacancy rate, a strengthened health & beauty and gifting offer, and significant new investment in family leisure. The centre's evolution demonstrates how proactive ownership and a refreshed occupier mix can materially enhance destination vitality.

Key Performance Highlights:
Braehead rose 213 places in the 2026 Retail Vitality Rankings, representing the largest improvement of any shopping centre in the UK. The uplift is underpinned by reduced vacancy, improved entertainment provision, and continued retailer recommitment.

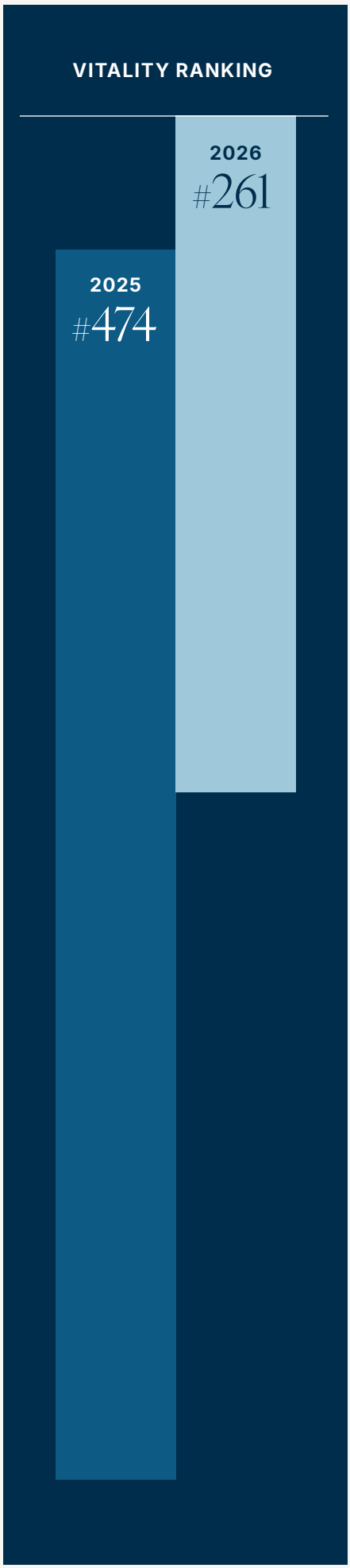
New Brand Arrivals & Expansions:
Braehead's retail and leisure mix has strengthened through a combination of major investment, new brands, and upgraded stores, including:

SuperPark:
The 30,000 sq ft indoor activity concept made its UK debut at Braehead, creating a major family-leisure anchor. With adventure, sport and freestyle activities, it extended dwell time across the destination.

Primark:
The value-fashion anchor expanded by 20% to 64,645 sq ft and completed a full store refurbishment, providing a significant vote of confidence in the centre.

MINISO, BPerfect, and Office:
These new additions enhance the beauty, gifting, fashion and accessible-lifestyle offer, aligning with demand for affordable and discovery-led purchases.

Snowflake Gelato and Stack & Still:
New food and beverage operators add affordable, treat-led and social occasions to the wider retail and leisure visit.



#261

RETAIL VITALITY RANKING #261

Braehead rose 213 places, representing the largest improvement of any shopping centre in the UK.

Braehead's Strategic Growth Drivers

Ownership-Led Transformation: Frasers Group's £220m acquisition has created a clear investment and repositioning narrative for the 1.1m sq ft Scottish destination.

Entertainment-Led Retail: SuperPark's UK debut adds a substantial leisure draw, extending dwell time and supporting spend across food, beverage, gifting and retail.

Resilience Through Reinvestment: Primark's expansion, upgrades by established occupiers, and a growing beauty, gifting and leisure mix are reshaping Braehead as a more diverse, all-day destination.

+213

UP 213 PLACES FROM 2025

Retail Occupiers

Retailers are prioritising profitable stores over wide coverage.

Amanda Wakefield
UK Head of Retail Agency

The best space continues to attract strong demand, while secondary units often require greater flexibility and, in some cases, repurposing.

Amanda Wakefield

Many occupiers are prioritising sales and profitability over market coverage, also factoring brand building and omnichannel approach into their expansion strategies.

We are seeing occupiers continue to invest in new store formats, particularly across fashion, beauty and lifestyle. Stores are increasingly being used to build brand awareness, showcase the brand and create a stronger customer experience as younger consumers are treating experiential shopping as part of the visit.

This is putting greater focus on high quality fit outs, experiential elements and formats that support brand discovery, social media engagement and omnichannel services such as click-and-collect, returns and customer service.

At the same time, we are seeing retailers are rationalising their networks, reducing exposure to smaller or lower-performing locations and concentrating investment in fewer, better stores. This is driving demand for larger units in dominant centres, prime city centre pitches and well-performing retail parks. These locations allow brands to offer a fuller range, reach a wider catchment and benefit from stronger visibility.

Retailers are also becoming more selective around pitch, often prepared to wait for the right unit rather than commit to secondary space with limited footfall, visibility or adjacencies. As a result, the gap between prime and secondary locations is widening. The best space continues to attract strong demand, while secondary units often require greater flexibility and, in some cases, repurposing. Newmark's data analytics can help with these selection challenges.

Overall, occupiers are taking a more targeted approach, prioritising locations that can deliver sales performance, customer engagement and brand relevance.

Case Study

Trafford Centre, Manchester

Located in Greater Manchester, The Trafford Centre is the highest-ranked shopping centre in the 2026 Retail Vitality Rankings. Its rise from #17 to #10 reflects a significant reduction in vacancy, strong weighted spend, and an increasingly diverse retail, leisure and hospitality mix. The centre's performance is underpinned by a significant investment from international fashion brands, a growing food and beverage proposition and high occupancy across entertainment, health and beauty and gifting categories.

Key Performance Highlights:
Trafford Centre rose seven places to become the highest-ranked shopping centre in the 2026 Retail Vitality Rankings. The improvement has been supported by a material reduction in vacancy (10.8%), with suitable retail space now increasingly difficult to secure for prospective tenants.

New Brand Arrivals & Expansions:
Occupier activity has been particularly strong over the past 12 months, with a mix of flagship investment, new market entrants, and expanded leisure and food and beverage provision, including:

Zara, Pull&Bear, Bershka, and Stradivarius:
Inditex has enlarged and upgraded its Trafford Centre presence, including an expanded Zara, a larger Pull&Bear, the arrival of Bershka, and a new 13,500 sq ft Stradivarius flagship store.

Urban Outfitters and Boux Avenue:
Urban Outfitters opened a 7,500 sq ft store, while Boux Avenue selected Trafford Centre for a major northern flagship.

Uniqlo and Lululemon:
Uniqlo has committed to a second Manchester location, while Lululemon has upsized, reinforcing the destination's strength in full-price fashion and athleisure.

Shake Shack, Joe & The Juice, Läderach, and Bunsik:
New operators are expanding the centre's food and beverage offer across quick service, premium confectionery, coffee and social dining.

#10

RETAIL VITALITY RANKING #10

Trafford Centre rose 7 places to become the highest ranked shopping centre in the UK.

Trafford Centre's Strategic Growth Drivers:

Flagship Store Strategy:
Larger, better configured stores are enabling brands to combine trading, brand building, and omnichannel service. The Inditex investment is a clear endorsement of Trafford Centre's regional scale and consumer draw.

More Reasons to Visit:
A growing mix of food, beverage, beauty, gifting, and entertainment is creating a full-day proposition. New operators extend the centre's appeal across family, social and treat-led missions.

Scarcity Strengthens Demand:
A significant reduction in vacancy has made suitable space increasingly difficult to acquire. This reinforces Trafford Centre's ability to curate its offer and capture demand from brands seeking a high-footfall North-West presence.

+7

UP 7 PLACES FROM 2025

Case Study

Glasgow City Centre

Glasgow City Centre is one of the highest climbers in the top 25 in the 2026 Retail Vitality Rankings. The improvement has been driven by one of the strongest catchment spending profiles in the rankings, as well as lower vacancy and continued investment across its core retail destinations. It also has the 4th highest amount of health and beauty floorspace of the 1,000 locations assessed, underpinning its role as Scotland's leading destination for fashion, beauty and lifestyle retail.

Key Performance Highlights:
Glasgow City Centre rose 20 places to #11 in the 2026 Retail Vitality Rankings. The improvement has been supported by a 1.2% reduction in vacancy since 2025. This provides a strong platform for retailers across the city centre's core shopping destinations, particularly Buchanan Street, Princes Square, Buchanan Galleries and St. Enoch Centre.

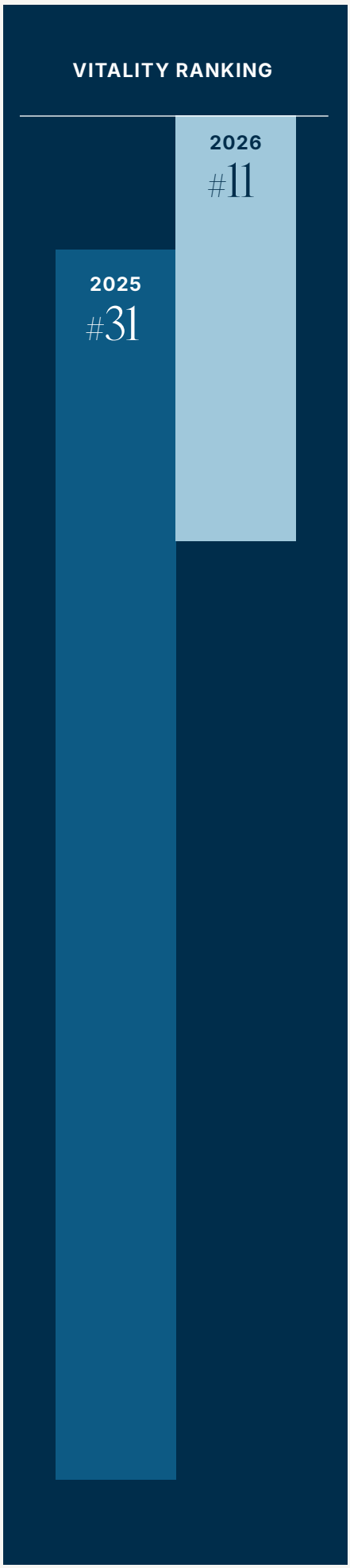
New Brand Arrivals & Expansions:
Glasgow City Centre has seen continued occupier activity since 2025, with new fashion, jewellery and F&B openings alongside major investment from established retailers. Activity across the city centre reflects growing confidence in the city's prime retail core:

Pandora:
Pandora has opened a new store on Buchanan Street, strengthening the city centre's jewellery offer and adding further activity to Glasgow's prime retail pitch.

MINISO:
The international retailer has opened on Buchanan Street opposite H&M, its second Glasgow store following a launch at Glasgow Central Station. This reflects an ongoing UK expansion programme and further international representation on the prime pitch.

Jigsaw and Style Scouts UK:
Jigsaw has returned to Glasgow with a 1,338 sq ft boutique at Princes Square, while Glasgow-founded luxury handbag specialist Style Scouts UK has also taken space at the arcade. Both arrivals followed a repositioning programme that brought Princes Square to full occupancy.

John Lewis:
John Lewis has committed £20 million to refurbish its Buchanan Galleries store, part of a £50 million programme across five UK stores.



#11

RETAIL VITALITY RANKING #11

Glasgow City Centre rose 20 places to #11 in the 2026 Retail Vitality Rankings.

Glasgow's Strategic Growth Drivers:

Catchment scale and spend:
Glasgow has the second-highest weighted catchment spend of all locations assessed, behind only the West End. This supports the case for flagship formats and the city's leading health and beauty provision.

Constrained prime supply:
Low vacancy and limited availability on Buchanan Street are supporting rental growth and pushing retailer requirements outward to Argyle Street.

Landlord investment in the prime core:
Buchanan Galleries has secured consent for a comprehensive transformation, introducing a destination food hall, an additional retail and leisure unit and improved public space, with the first phase of investment now underway.

+20

UP 20 PLACES FROM 2025

Hospitality Occupiers

Hospitality remains essential, but cost pressure narrows choices.

Simon Carson
Head of Leisure, Food & Beverage

Successful destinations are using hospitality to create new reasons to visit.

Simon Carson

Catering and other hospitality options remain key to towns and shopping malls despite cost pressures making operators more selective about site selection.

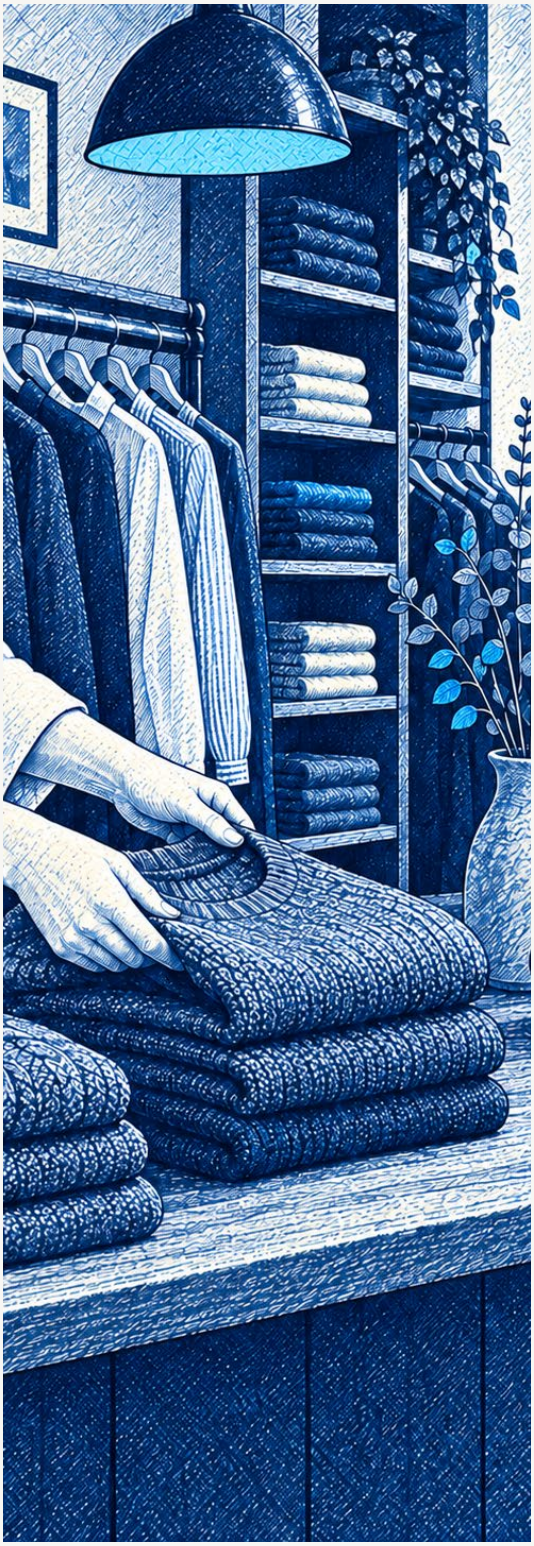
Locations that outperform their peers tend to have a strong F&B and experiential offer, but the opportunity is now broader than simply adding more places to eat. Successful destinations are using hospitality to create new reasons to visit.

The mix is becoming more diverse. We are seeing growing demand for a range of hospitality providers, including dessert and treat-led operators, coffee, matcha and health-focused concepts, alongside established casual-dining brands.

Rather than treating food and beverage as a supporting use, developers and asset managers are increasingly positioning it at the heart of a scheme. Hospitality led concepts can drive footfall, increase dwell time and help create a more vibrant, adaptable retail environment.

Cost discipline is influencing where hospitality brands choose to open, shaping wider expansion strategies for them and making the quality of the location increasingly important. Pressures from increasing cost of goods and salaries mean that F&B brands in particular are undertaking greater due diligence before opening new sites.

However, while site selections for hospitality brands have become more refined, they remain a vital element of retail centres, helping to create more differentiated and compelling destinations.



Case Study

Livingston

Livingston is one of the largest risers in the 2026 Retail Vitality Rankings, climbing 254 places from #604 to #350, one of the biggest single-year improvements recorded in this year's results. As West Lothian's principal retail destination, the town combines a mainstream and outlet offer of national scale, giving retailers the flexibility to trade full-price and outlet formats within the same location. The improvement reflects renewed occupier demand, a series of significant brand upsizings and continued landlord investment in both retail and leisure.

Key Performance Highlights:
The rise has been supported by a reduction in vacancy since 2025 as new lettings have absorbed available space across the town. The Centre extends to approximately one million sq ft with more than 150 stores and restaurants, attracting over 15.8 million visitors a year. Livingston Designer Outlet trades directly opposite, forming Scotland's largest outlet destination.

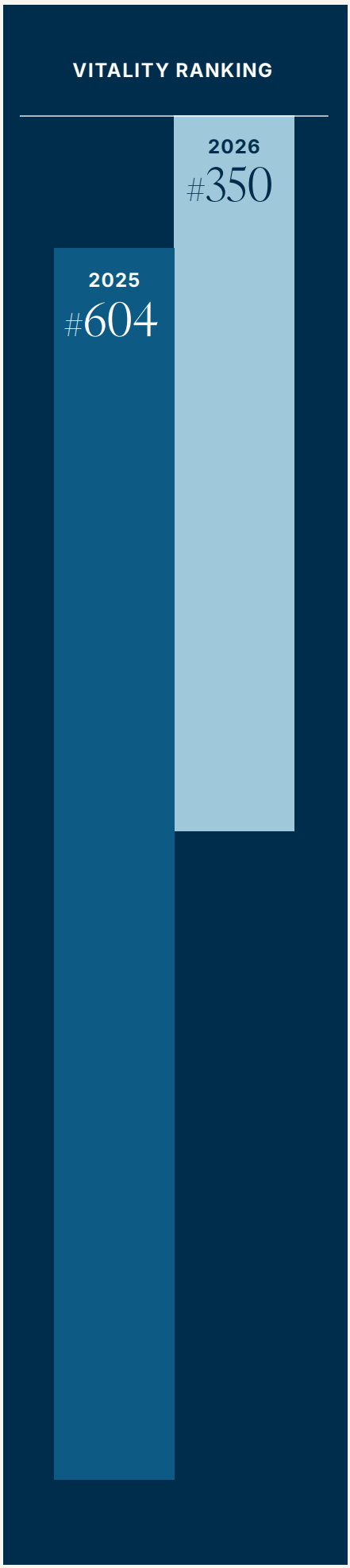
New Brand Arrivals & Expansions:
Livingston has seen sustained occupier activity across both destinations since late 2025, with new gifting, lifestyle, F&B and outdoor brands opening alongside significant upsizings by established retailers:

Gifting and lifestyle arrivals:
MINISO, Flying Tiger Copenhagen and The Works have all opened at The Centre, alongside Scotland's first ArrowHeadz store, materially strengthening the town's gifting offer.

JD Sports and new F&B:
JD Sports has tripled the size of its store at The Centre, which now trades as the retailer's largest in the country, while Wingstop has added a 4,780 sq ft restaurant to the catering offer.

Nike upsizing at the outlet:
Nike is relocating to a unit almost double its previous size, alongside store refits by Castore and NEXT and new arrivals Hamilton & Brown and Tikka Nation.

Outdoor and premium growth:
Columbia has opened its only Scottish store, joining Monsoon, Belstaff and Crocs and reinforcing an outdoor cluster alongside The North Face, Adidas, New Balance and Castore. Meanwhile, Calvin Klein has more than doubled its floorspace at the main entrance.



#350

RETAIL VITALITY RANKING #350

Climbing 254 places, Livingston is one of the largest risers in the 2026 Retail Vitality Rankings.

Livingston's Strategic Growth Drivers:

Resilient category mix:
A high percentage of gifting and health and beauty retailers gives Livingston strong exposure to two of the better-performing comparison categories, supporting repeat visits and reducing reliance on discretionary fashion spend.

Outlet trading momentum:
Livingston Designer Outlet has continued to grow sales through the first half of 2026, following its most successful fourth quarter on record.

Investment and leisure diversification:
Almost £5 million has been committed to regenerating The Centre, now delivering a 22-lane bowling and gaming venue, while the outlet broadens its own leisure and dining offer.

+254

UP 254 PLACES FROM 2025

Top 5 Centres by Region

The top five centres in each region are typically led by city centres, with London, the South East and the North East being the notable exceptions.

Derby is among the most improved locations this year, rising 118 places in the overall rankings to reach fourth in the East Midlands. Larger city centres and major shopping malls have also continued to climb, with Glasgow rising 20 places into the national top 25. Scale, occupier mix and catchment depth remain the strongest predictors of performance, with MetroCentre, Trafford Centre and the Westfield schemes all holding leading positions in their regions.

City centres lead most remaining regions, though the strongest malls and market towns rank just as highly.

Bluewater ranks top in the South East, ahead of strong city centres including Oxford, Milton Keynes and Brighton. With Cribbs Causeway and Meadowhall also ranking highly, the best out-of-town malls continue to compete directly with major city centres. Affluent market towns remain well represented, including Shrewsbury and Leamington Spa in the West Midlands, Harrogate in Yorkshire and Marlborough in the South West.

SCOTLAND

1	Edinburgh City Centre	City Centre
2	Glasgow City Centre	City Centre
3	Aberdeen City Centre	City Centre
4	St Andrews	Town - Small
5	Edinburgh - Old Town	Neighbourhood

NORTH WEST

1	Manchester City Centre	City Centre
2	Liverpool City Centre	City Centre
3	Trafford Centre	Out of Town Mall
4	Chester City Centre	City Centre
5	Wilmslow	Town - Medium

WALES

1	Cardiff City Centre	City Centre
2	Monmouth	Town - Small
3	Swansea City Centre	Town - Large
4	Conwy	Town - Small
5	Gorseinon	Neighbourhood

WEST MIDLANDS

1	Birmingham City Centre	City Centre
2	Shrewsbury	Town - Large
3	Leamington Spa	Town - Large
4	Stratford-upon-Avon	Town - Medium
5	Solihull	Town - Large

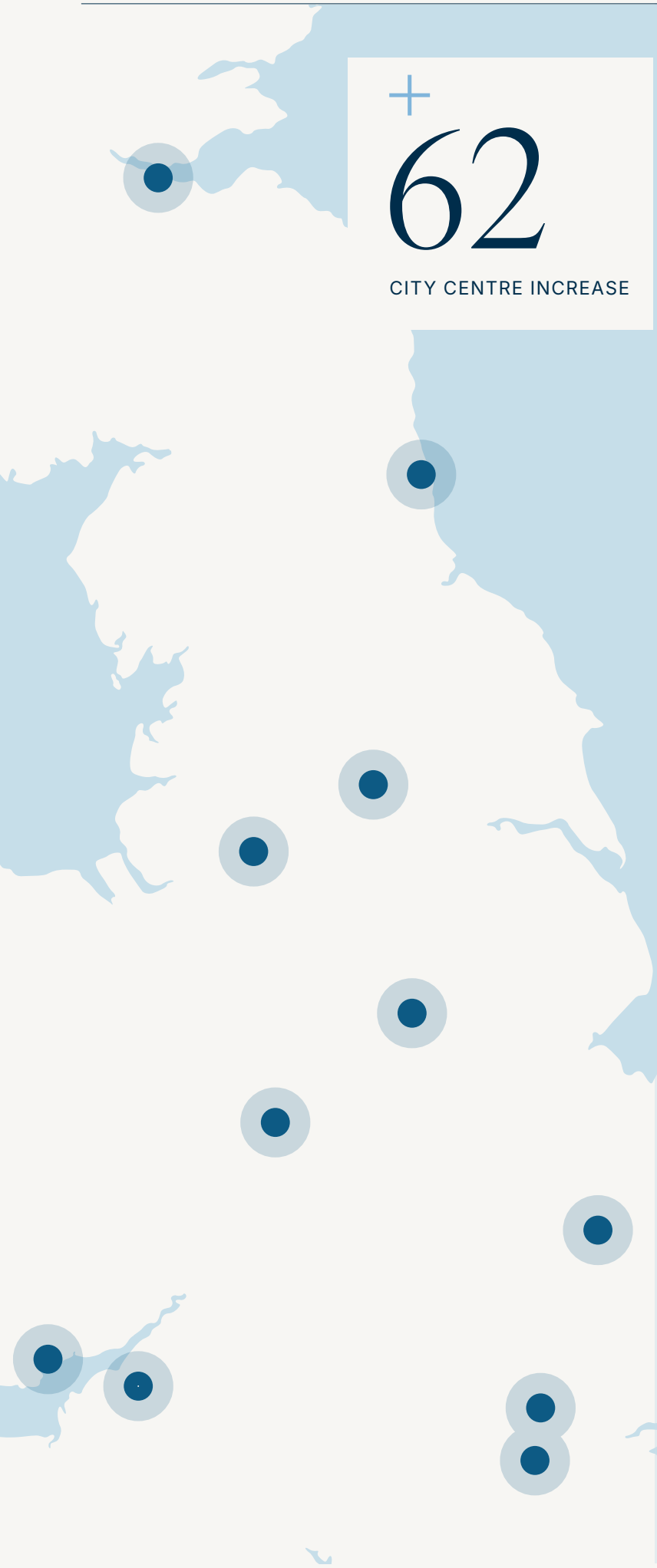
SOUTH WEST

1	Bath City Centre	City Centre
2	St Ives (Cornwall)	Town - Small
3	Marlborough	Town - Small
4	Cribbs Causeway	Out of Town Mall
5	Bristol - Clifton	Neighbourhood

+59

LARGE TOWN INCREASE

Source: Newmark



+62

CITY CENTRE INCREASE

NORTH EAST

1	MetroCentre	Out of Town Mall
2	Newcastle upon Tyne	City Centre
3	Yarm	Neighbourhood
4	Morpeth	Town - Small
5	Cramlington	Town - Small

YORKSHIRE AND THE HUMBER

1	Leeds City Centre	City Centre
2	York City Centre	City Centre
3	Harrogate	Town - Large
4	Meadowhall	Out of Town Mall
5	Ilkley	Town - Small

EAST MIDLANDS

1	Nottingham City Centre	City Centre
2	Stamford	Town - Medium
3	Leicester City Centre	City Centre
4	Derby	City Centre
5	West Bridgford	Town - Small

EAST OF ENGLAND

1	Cambridge City Centre	City Centre
2	St Albans	Town - Medium
3	Berkhamsted	Town - Small
4	Watford	City Centre
5	Hitchin	Town - Medium

GREATER LONDON AUTHORITY

1	Chelsea - King's Road	London District
2	Knightsbridge	London District
3	Kingston upon Thames	Town - Large
4	Westfield Stratford City	Out of Town Mall
5	Westfield London	Out of Town Mall

SOUTH EAST

1	Bluewater	Out of Town Mall
2	Oxford City Centre	City Centre
3	Milton Keynes City Centre	City Centre
4	Brighton City Centre	City Centre
5	Cobham	Town - Small

Analysis by Region

Grouping centres by region shows where vitality concentrates.

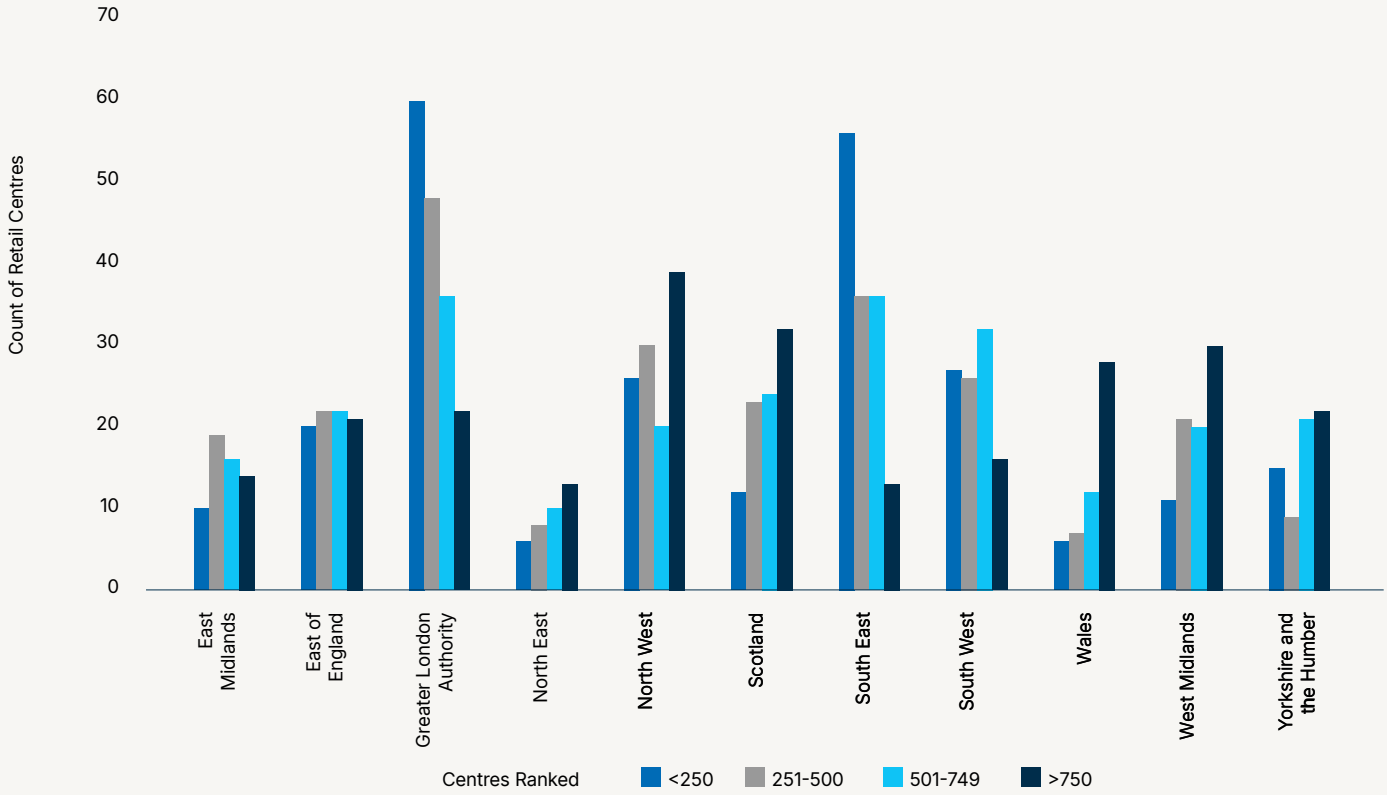
The chart below groups retail centres by region and aggregates their number by rank quartiles to better understand regional differences in the 2026 Retail Vitality Rankings and determine if certain regions exhibit greater vitality.

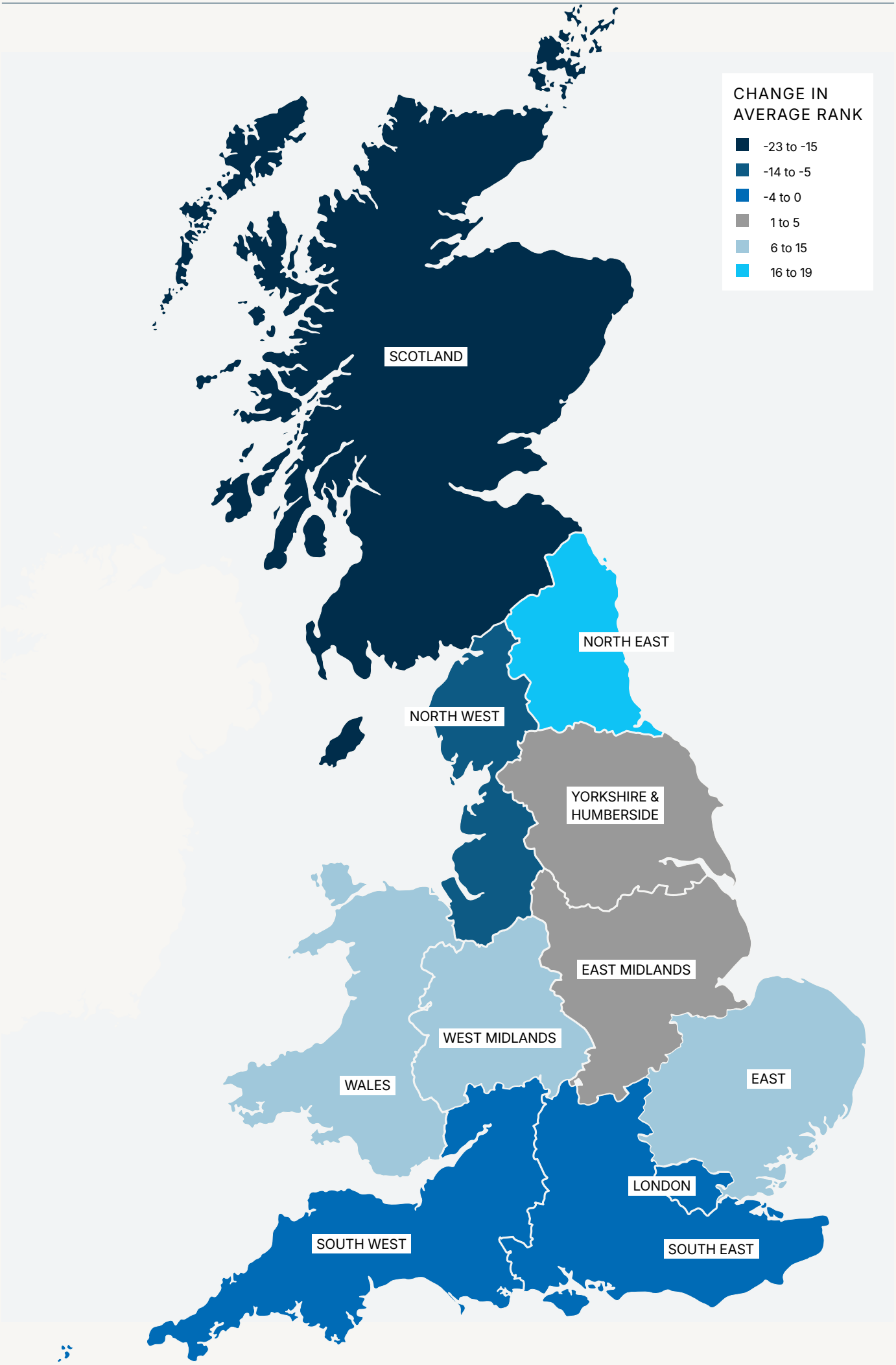
The Greater London Authority area boasts the most retail centres ranked within the top 250, followed by South East. This indicates that these regions have the greatest levels of vitality. In contrast, larger proportions of retail centres in the North West and Scotland rank below 750th place. The map and table to the right display regional changes in average rank since the 2025 Vitality Index. Darker shades denote a worsening of average position. The North East and West Midlands have shown notable improvements in their average rankings. Meanwhile, Scotland experienced the most significant average fall, followed by North West.

	2026	2025	↑↓
East of England	515	521	↑7
Greater London Authority	389	388	↓1
South West	465	465	0
South East	384	383	0
Yorkshire and The Humber	557	561	↑5
North West	539	529	↓10
Scotland	581	558	↓23
East Midlands	515	519	↑4
West Midlands	589	603	↑14
North East	593	612	↑19
Wales	698	707	↑9

Figures rounded

Count of Centre by Rank and Region




CHANGE IN AVERAGE RANK
-23 to -15
-14 to -5
-4 to 0
1 to 5
6 to 15
16 to 19
SCOTLAND
NORTH EAST
NORTH WEST
YORKSHIRE & HUMBERSIDE
EAST MIDLANDS
WEST MIDLANDS
WALES
EAST
LONDON
SOUTH WEST
SOUTH EAST

Top 5 Centres by Centre Type

Vitality leaders vary widely by type of retail centre.

In the city centre category, Cambridge leads the rankings ahead of Manchester, with Edinburgh, Liverpool and Leeds completing the top five.

In London, upmarket centres such as Chelsea (King's Road) and Knightsbridge top the London - District category, alongside Wimbledon Village, Richmond and Kensington High Street.

Affluent and visitor-driven locations perform strongly in the neighbourhood category, including Bristol - Clifton, Bowness-on-Windermere and Edinburgh's Old Town.

UK #1 HIGH STREET
Cambridge

LONDON'S #1 NEIGHBOURHOOD
Holborn

LONDON'S #1 DISTRICT
Chelsea

Top 5 City Centres

NEIGHBOURHOOD		
1	Bristol - Clifton	South West
2	Bowness-on-Windermere	North West
3	Brighton - Queens Road	South East
4	Yarm	North East
5	Edinburgh - Old Town	Scotland

LONDON DISTRICT		
1	Chelsea - King's Road	Greater London Authority
2	Knightsbridge	Greater London Authority
3	Wimbledon Village	Greater London Authority
4	Richmond	Greater London Authority
5	Kensington High Street	Greater London Authority

LONDON NEIGHBOURHOOD		
1	Holborn - The Brunswick	Greater London Authority
2	Fulham - High Street	Greater London Authority
3	Earlsfield	Greater London Authority
4	Tooting - Tooting Bec	Greater London Authority
5	Hendon - Brent Street	Greater London Authority

Category leaders 2026

#1 OUT-OF-TOWN
Trafford Centre
North West
#10
Overall ranking

#1 LARGE TOWN
Kingston Upon Thames
London
#6
Overall ranking

#1 MEDIUM TOWN
St Albans
East of England
#32
Overall ranking

#1 SMALL TOWN
Cobham
South East
#26
Overall ranking

Trafford Centre leads the out-of-town mall category, ahead of Westfield Stratford City and Bluewater.

Cobham tops the list for small towns, while the remaining four are all affluent towns from across the South of England.

Kingston upon Thames leads the large towns and St Albans the medium towns, reflecting the same concentration of affluent southern locations.

UK #1 SMALL TOWN
Cobham

UK #1 MEDIUM TOWN
St Albans

UK #1 LARGE TOWN
Kingston Upon Thames

SMALL TOWN

1	Cobham	South East
2	St Ives (Cornwall)	South West
3	Marlborough	South West
4	Berkhamsted	East of England
5	Reigate	South East

MEDIUM TOWN

1	St Albans	East of England
2	Tunbridge Wells	South East
3	Wilmslow	North West
4	Winchester City Centre	South East
5	Farnham	South East

LARGE TOWN

1	Kingston upon Thames	Greater London Authority
2	Shrewsbury	West Midlands
3	Harrogate	Yorkshire and The Humber
4	Leamington Spa	West Midlands
5	Cheltenham	South West

OUT-OF-TOWN

1	Trafford Centre	North West
2	Westfield Stratford City	Greater London Authority
3	Bluewater	South East
4	Westfield London	Greater London Authority
5	Cribbs Causeway	South West

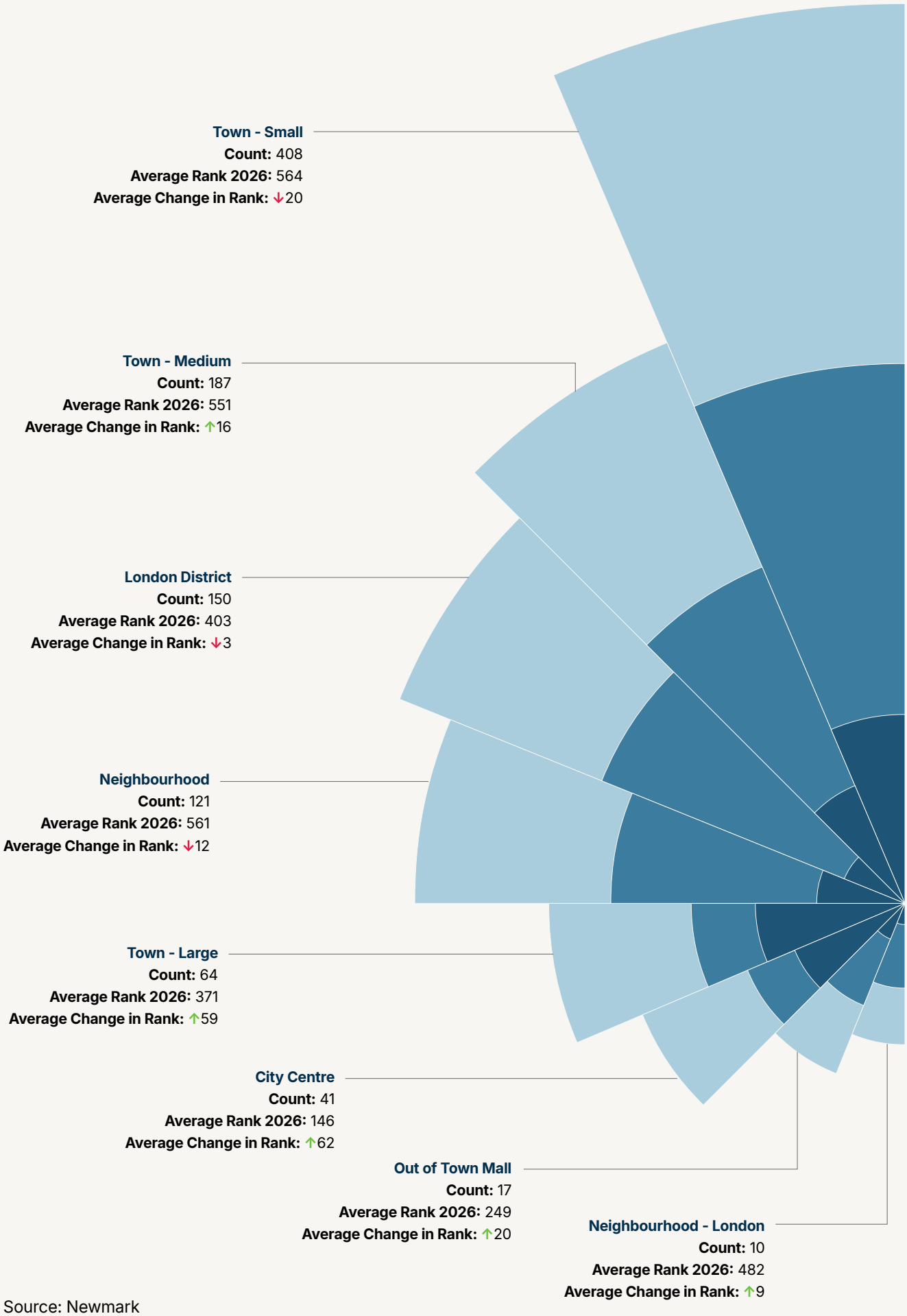
Analysis of Results by Centre Type

In 2026, city centres and large towns recorded the greatest increases in average rank, rising 62 and 59 places respectively. Small towns and neighbourhood centres saw the steepest falls, dropping 20 and 12 places.

City centres and out of town malls are on average ranked the best with 146 and 249, while small towns are ranked the lowest with 564.

Small towns host the highest number of retail centres, followed by medium towns and London districts.

	COUNT	AV. RANK	↑↓
City Centre	41	146	↑62
London District	150	403	↓3
Neighbourhood	121	561	↓12
Neighbourhood-London	10	462	↑9
Out of Town Mall	17	249	↑20
Town- Large	64	371	↑59
Town- Medium	187	551	↑16
Town- Small	408	564	↓20



Source: Newmark

Landlords

Smart asset management sustains value across every type of location.

Josh Braid
Director
Retail Leasing

Proactive asset management can help add and maintain value to investments across a range of locations, including improving secondary locations by creating opportunities to diversify.

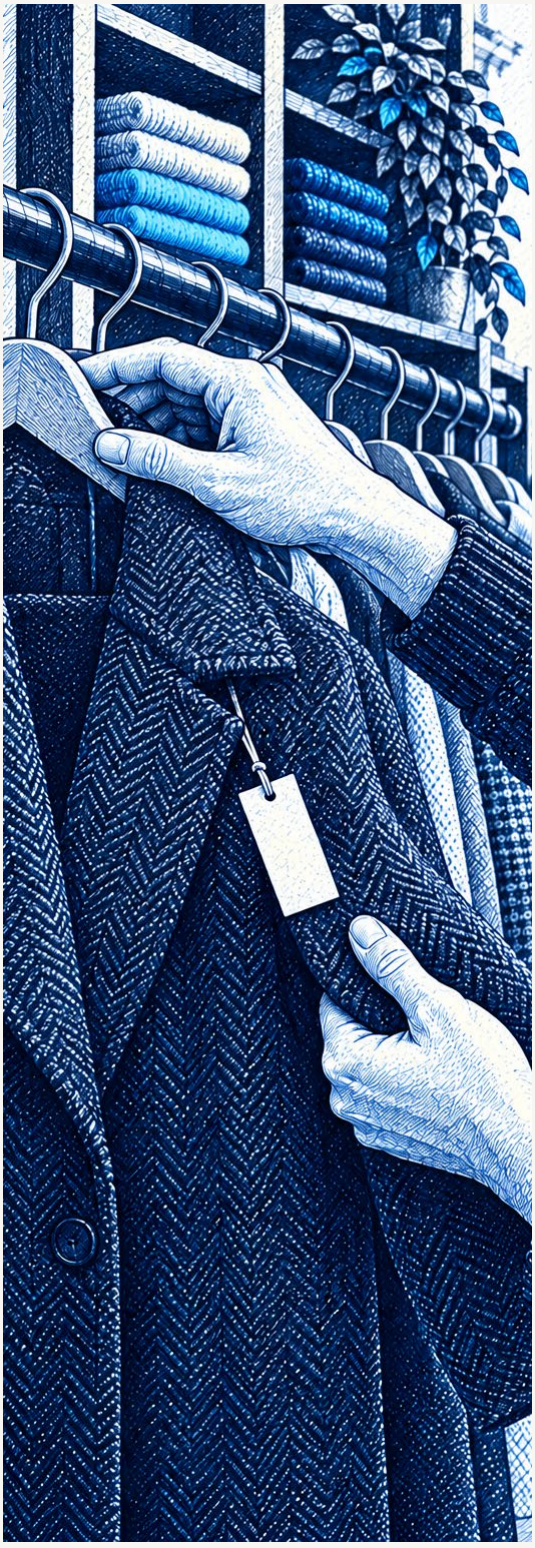
Newmark's Retail Vitality Rankings demonstrate the value of proactive asset management. Some weaker destinations have improved their position by repurposing obsolete retail space and introducing complementary uses that better support footfall and long-term relevance.

The retail and leisure offer must be aligned with the local consumer base. A mismatch between local demand and retail or leisure supply can limit trading performance, even in centres with reasonable footfall.

There are investment opportunities in larger, dominant retail destinations. For example, regional malls are changing hands as investors target established catchments, scale and the potential to improve tenant quality, rental income and customer experience through active management.

However, non-prime streets and retail locations can also offer value, particularly where pricing reflects vacancy or underperformance. Unlocking this potential requires a targeted asset-management strategy, combining active leasing, physical improvements and a broader occupier mix suited to local customer demand.

Ultimately, non-prime centres need to establish a distinct identity rather than compete directly with prime retail destinations. A well-curated mix of value, independents, leisure and experiential shopping can create a stronger reason to visit, increase dwell time and support more sustainable long-term performance.

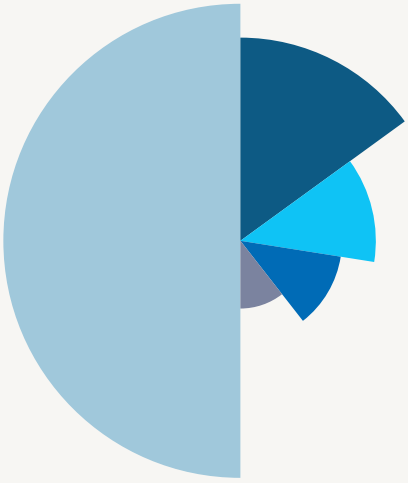


Shopper Spend & Worker Spend

We use gravity modelling to distribute consumer spending across UK retail centres. This approach highlights a centre's attractiveness by comparing its ability to draw shopper expenditure against competing retail centres.

The model is calibrated using a combination of GPS mobility data, which provides insights into annual visitor numbers and where those visitors travel from. It is also informed by consumer movement surveys that we carry out on behalf of councils and landlords. We also incorporate proprietary data regarding centre size, brand presence and how far shoppers are willing to travel for those particular brands. Higher levels of shopper spend correlate to stronger and more vital retail centres.
While hybrid working remains common, there has been a clear shift back toward office-based work. Our shopper spend data comprises of three demand layers: home, work or tourism-based spending. The worker spend serves as a risk indicator, as centres that are overly dependent on worker spending may experience lower annual visitors. Examples include transport hubs, the City of London and Kings Cross, as shown in the accompanying table.

Top 5 Retail Centres by Shopper Expenditure (£b per annum)



London West End
£18bn

Glasgow
£5.4bn

Birmingham
£4.5bn

Manchester
£4.3bn

Leeds
£3.8bn

Top 5 Retail Centres by Worker Expenditure %

Victoria Street (London)
80.4%

London City
71.1%

Canary Wharf
55.7%

Euston (London)
52.0%

Kings Cross (London)
30.0%

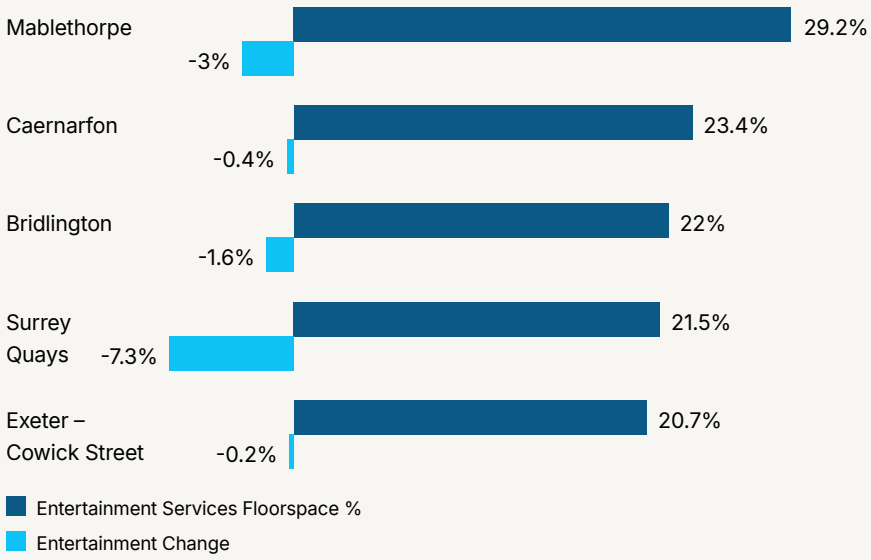
Source: Newmark

Entertainment Services & Pubs, Clubs and Bars

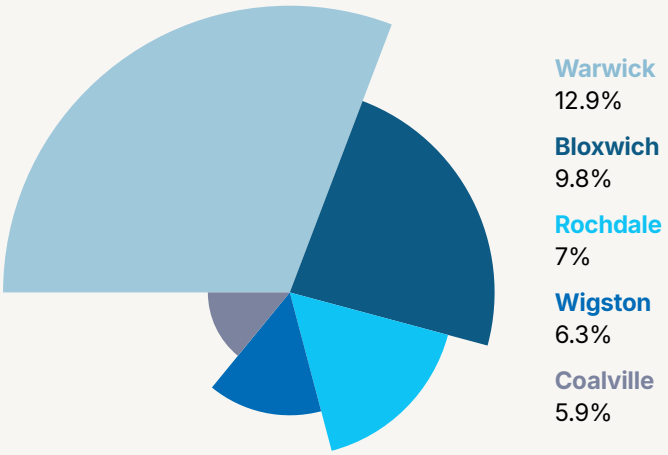
The entertainment sector is changing from a traditional, venue-led model towards a more diverse, experience-led offer. Consumers increasingly value activities that are social, interactive and memorable, such as competitive socialising, live events, gaming and experiential dining. Streaming and home entertainment continue to compete with cinemas, meaning that traditional operators increasingly need to offer premium formats, events or experiences that cannot easily be replicated at home.

Pubs, bars and clubs remain central to the night-time economy, although the sector continues to face pressure from changing social habits, rising operator costs, and post-pandemic recovery. Younger consumers increasingly favour hybrid spaces that combine food, music and social experiences, rather than traditional drinking-led formats. The strongest centres are typically those with a diverse and well-integrated leisure, hospitality and retail offer that can attract visitors throughout the day and evening. Strengthening this sector not only boosts evening economy activity but also enhances a centre's identity and cultural offer. It is therefore an important indicator of vitality of the centre.

Top 5 Retail Centres by Entertainment Services Floorspace



Top 5 Retail Centres by Pub, Clubs & Bars Floorspace Change



Source: Newmark

Health & Beauty and Gifting

The health & beauty sector has continued to outperform many retail categories over the past year. This has been supported by consumers placing greater emphasis on personal wellbeing, skincare and self care, with trends such as Korean beauty gaining significant popularity. This growth is encouraging health & beauty brands to expand their physical presence and take larger space within retail centres.

Gifting has become increasingly important in recent years, supported by a demand for affordable luxury, collectables and products that offer personalisation. Brands such as Pop Mart have benefitted from this trend, as consumers are drawn to limited edition items and products that are easily shared online. Social media is increasingly influencing product discovery, particularly among the younger consumers, while older shoppers are seeking gifts that feel more premium and memorable.

Top 5 Retail Centres by Health & Beauty Floorspace

Ashford (Surrey)
29.6%

Spennymoor
29.3%

Mill Hill
26.7%

Hendon Central
26.3%

Saltash
24.6%

Top 5 Retail Centres by Gifting Floorspace

Glastonbury
10.2%

Swanage
8.7%

Cardigan
8.4%

Bowness-on-Windermere
8.2%

Diss
8.2%

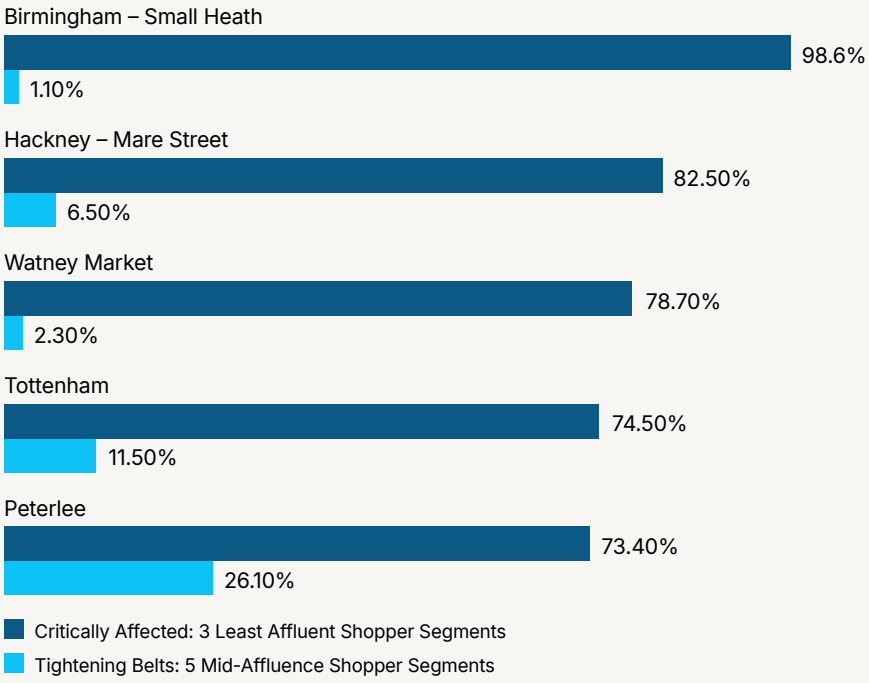
Source: Newmark

Affluence Levels of Consumer Groups

The cost-of-living crisis resonates differently across various groups in Newmark's proprietary consumer segmentation (Shopper Segments), most notably impacting those in less affluent circumstances.

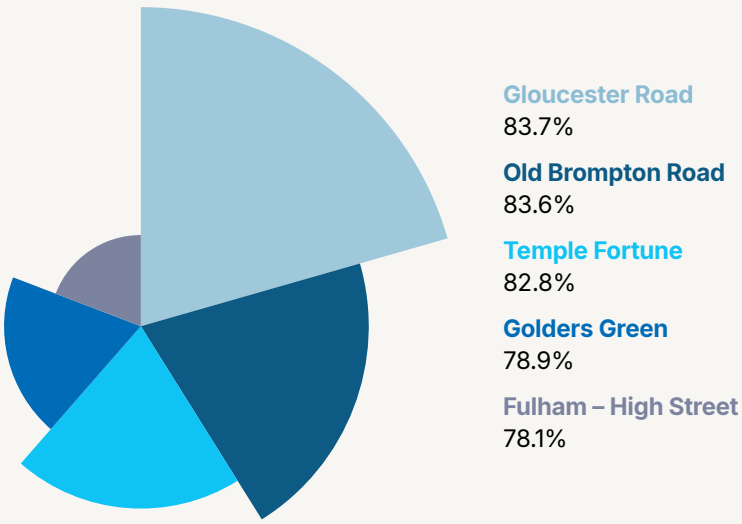
These individuals, classified as 'Critically Affected', encompass the three least affluent Shopper Segments. Their income typically comes from inconsistent, lower-paying jobs and government support, with limited opportunities for wage growth. This group faces particularly high levels of personal inflation, as a significant portion of their income is allocated to essentials such as food, housing and utilities, all which have experienced substantial price increases. These challenges are also affecting the five mid-income shopper segments, often referred to as the 'squeezed middle'. These consumers are experiencing rising mortgage payments, food costs and expenditure on leisure and clothing, all of which contribute to higher personal inflation. However, they are generally better placed to manage these pressures by adjusting their spending, seeking higher paid roles or negotiating pay increases with their employers. In contrast, the two most affluent shopper segments are supported by family wealth or substantial savings. Retail centres that cater to these consumers are typically more resilient during periods of economic uncertainty.

Top 5 Retail Centres by Critically Affected Shoppers



Top 5 Retail Centres by Affluent Shoppers

Percentage of shoppers within the two most affluent shopper groups



Source: Newmark

Appendix

Newmark Shopper Segments

Appendix

Newmark Shopper Segments

Shopper Segment 1

Annual Salary Per Capita	£70,000
Adult Age	20-59 yrs
Child Age	Few Children
House Price	Very High
Geographical Area	Inner City / Suburbs
Social Group	AB
Qualifications	Very High
Employment Type	Professional
Newspaper Readership	Financial / Quality
Car Ownership	Low
Internet Usage	Very High
Example Locations	Kensington, Chelsea, Knightsbridge, Notting Hill Gate

MOST PURCHASED BRANDS

Alo Yoga
Ralph Lauren
Canada Goose
Third Space
Paul Smith
Burberry
Selfridges & Co
Lululemon
Apple
Reiss
Coach
Wholefoods Market

Shopper Segment 2

Annual Salary Per Capita	£60,000
Adult Age	40+ yrs
Child Age	15+ yrs
House Price	Very High
Geographical Area	Suburbs / Rural
Social Group	AB
Qualifications	High
Employment Type	Professional
Newspaper Readership	Financial / Quality
Car Ownership	High
Internet Usage	Above Average
Example Locations	Guildford, Tunbridge Wells, Epsom, Bath, Berkhamsted

MOST PURCHASED BRANDS

Barbour Levi's
Hobbs
Waitrose & Partners
L.K.Bennett
Hackett
Radley
John Lewis & Partners
Castle Fine Art
M&S
Jo Malone
Whistles

Appendix

Newmark Shopper Segments

Shopper Segment 3

Annual Salary Per Capita	£50,000
Adult Age	30-64 yrs
Child Age	5-19 yrs
House Price	Above Average
Geographical Area	Rural
Social Group	AB
Qualifications	Above Average
Employment Type	Professional, White Collar
Newspaper Readership	Regional / Quality
Car Ownership	Very High
Internet Usage	High
Example Locations	Salisbury, Thame, Bury St Edmunds, Grantham, Harrogate

MOST PURCHASED BRANDS

Disney Store
Mint Velvet
JoJo Maman Bébé
Seasalt
M&S
John Lewis & Partners
Phase Eight
Lululemon
Jigsaw
Oliver Bonas
L'Occitane
Sweaty Betty

Shopper Segment 4

Annual Salary Per Capita	£42,000
Adult Age	30-74 yrs
Child Age	0-15 yrs
House Price	Average
Geographical Area	Towns / Suburbs
Social Group	ABC1
Qualifications	Above Average
Employment Type	White & Blue Collar
Newspaper Readership	Regional / Mid Market
Car Ownership	High
Internet Usage	High
Example Locations	Ruislip, Clacton-on-Sea, Maidstone, Potters Bar

MOST PURCHASED BRANDS

Crew Clothing
Superdry
M&S
Waterstones
Sainsbury's
Holland & Barrett
Trespass
Robert Dyas
Dunelm
Timberland
Next
White Stuff

Appendix

Newmark Shopper Segments

Shopper Segment 5

Annual Salary Per Capita	£34,000
Adult Age	30-74 yrs
Child Age	5-15 yrs
House Price	Below Average
Geographical Area	Towns / Suburbs
Social Group	BC1C2
Qualifications	Average
Employment Type	White & Blue Collar
Newspaper Readership	Regional / Mid Market
Car Ownership	Average
Internet Usage	Average
Example Locations	Glasgow, Plymouth, Birmingham, Leicester

MOST PURCHASED BRANDS

Costco
River Island
JD
TK Maxx
Reserved
Grape Tree
Tesco
Next
Clarks
Sainsbury's
Mountain Warehouse
Zara

Shopper Segment 6

Annual Salary Per Capita	£26,000
Adult Age	30-64 yrs
Child Age	5-19 yrs
House Price	Below Average
Geographical Area	Towns / Suburbs
Social Group	C1C2D
Qualifications	Below Average
Employment Type	White & Blue Collar
Newspaper Readership	Mid Market
Car Ownership	Average
Internet Usage	Average
Example Locations	Coventry, Swansea, Torquay, Swindon, Hastings

MOST PURCHASED BRANDS

ASDA
Morrisons
Clarks
Regatta
H&M
Claire's
Next
Deichmann
Boots
New Look
Costco
Tesco

Appendix

Newmark Shopper Segments

Shopper Segment 7

Annual Salary Per Capita	£22,000
Adult Age	20-44 yrs
Child Age	0-19 yrs
House Price	Low
Geographical Area	Inner City / Suburbs
Social Group	BC1
Qualifications	Above Average
Employment Type	Professional, White Collar
Newspaper Readership	Quality / Mid Market
Car Ownership	Below Average
Internet Usage	Very High
Example Locations	Bristol: Clifton, Leeds: Headingley, Oxford: Headington

MOST PURCHASED BRANDS

Apple
Uniqlo
FootAsylum
Weekday
Shein
END.
Vinted
Pure Gym
Blank Street Coffee
Urban Outfitters
Gymshark
Zara

Shopper Segment 8

Annual Salary Per Capita	£18,000
Adult Age	35-59 yrs
Child Age	0-15 yrs
House Price	Low
Geographical Area	Small Towns / Suburbs
Social Group	C1C2D
Qualifications	Below Average
Employment Type	White & Blue Collar
Newspaper Readership	Regional / Popular
Car Ownership	Low
Internet Usage	Average
Example Locations	Tottenham, Leyton, Burnley, Stratford, Mansfield, Corby

MOST PURCHASED BRANDS

B&M
Primark
Iceland
The Gym Group
Matalan
Greggs
Temu
Lidl
CeX
Sports Direct
JD
The Works

Appendix

Newmark Shopper Segments

Shopper Segment 9

Annual Salary Per Capita	£12,000
Adult Age	20-59 yrs
Child Age	0-19 yrs
House Price	Low
Geographical Area	Small Towns / Suburbs
Social Group	C1C2D
Qualifications	Low
Employment Type	Blue Collar / Unskilled
Newspaper Readership	Popular
Car Ownership	Low
Internet Usage	Low
Example Locations	Colne, Bradford, Luton, Blackburn, Braehead

MOST PURCHASED BRANDS

Aldi
Peacocks
CeX
Savers
Londis
Card Factory
Primark
KFC
Bon Marche
Pep&Co
Home Bargains
Shoezone

Shopper Segment 10

Annual Salary Per Capita	£9,500
Adult Age	20-59 yrs
Child Age	0-19 yrs
House Price	Very Low
Geographical Area	Small Towns / Suburbs
Social Group	C2DE
Qualifications	Very Low
Employment Type	Blue Collar / Unskilled
Newspaper Readership	Popular
Car Ownership	Very Low
Internet Usage	Low
Example Locations	Jarrow, Sheffield, East Kilbride, Rhyl, Toxteth

MOST PURCHASED BRANDS

Bargain Booze
McDonalds
Farmfoods
Poundland
H&T Pawnbrokers
Costcutter
Pep&Co
Ladbrokes
Cash Converters
Oxfam
George @ ASDA
The Money Shop

Conclusion

Online trends now set the pace for physical retail centres.

Online trends are shaping retail centres to an increasing degree, with virtual trends and promotion boosting the performance in the physical world. Future location placemaking and store location strategies need to transition from omnichannel to digitally-led.

The success of many physical retailers – including popular health & beauty and gifting/ collectible tenants - is underpinned by embracing technology and its rapid evolution.

From the popularity of specific brands to more broad consumer trends, online marketing creates awareness and excitement. This marketing is often in the form of personal recommendations or demonstrations via social media videos – and never has digital 'word of mouth' been a more powerful tool.

The evolution of AI's capabilities, and regular usage levels amongst consumers, will also reshape retail and marketing in the future. Large Language Models are increasingly inserting adverts and paid-for recommendations into search responses, and even without direct advertising, successful brands are optimising their online marketing, product information and overall presence to maximise returns in consumer questions to their new AI advisors.

Some consumers are also using technology to monitor their health data, improving their understanding and awareness of potential health issues. Healthcare occupiers are responding by growing their presence on high streets and this could help give smaller high streets new ways of attracting visitors.

As technology develops rapidly, the most innovative retail brands and centres will provide offers that maximise the usage of this tech – for consumer engagement, for performance improvement, and for ways in which we can't yet imagine.

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CITY CENTRES ON AVERAGE RANK HIGHEST OF ANY CENTRE TYPE.

+ 254

LIVINGSTON. MOST IMPROVED LOCATION BY 254 PLACES.

– 20

BERKHAMSTED. BIGGEST DROP IN THE TOP 50 BY 20 PLACES.

Cambridge & Chelsea

STAYED CONSISTENT, MAINTAINING THE TOP SPOT 2 SPOTS FROM 2025.

From the popularity of specific brands to more broad consumer trends, online marketing creates awareness and excitement.

Andy Metherell

Contact

For more information, please contact our team.

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NEWMARK

the Retail Vitality Rankings

DATA-LED INSIGHT INTO THE UK RETAIL LANDSCAPE

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