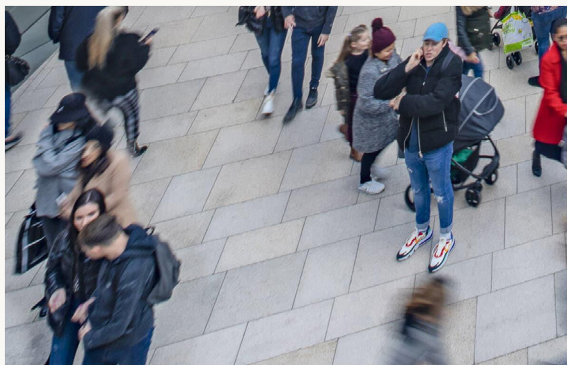
Prescient

How satisfied are UK shoppers with their retail centres?

2025 Shopper Sentiment Report



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About Prescient Research

Since 2019, Prescient Research has been tracking the performance of UK, Australian and New Zealand retail centres through customer sentiment. During this time, we have collected over 88,000 individual responses directly from shoppers in-centre.

11,201
Responses

3.6-6.4%
Margin of error

167
Retail centres

5 minutes
Duration of survey

About this report

This report presents and analyses paid responses from a national sample comparing 167 retail centres with 35 different landlords across the UK in 2024 and 2025. The insights uncover how shoppers see retail centres performing today, and what could be actioned to increase their spend, visitation and advocacy in the future.

Wondering how your retail centres compare?

Prescient Research can offer individual landlord performance insights. Simply reach out to us and we will arrange a private presentation with your team.

www.prescient.properties

Methodology

Prescient Research has been collecting paid responses from customers of retail centres since 2021. These responses have been gathered from across the UK through fou;r different paid online panels which are ISO 20252 compliant. To ensure the respondent provides accurate information, they need to have visited the nominated retail centre within the last month.

Prescient Research has reinvented sentiment research for places.

Through technological innovation we are changing the way places measure customer sentiment, so you can proactively anticipate the needs of your customers.

Prescient Voice is a customer sentiment platform designed by property experts, for property experts.

Others only measure. We inform decisions.

Visitation	Capture feedback	Measure with data	Identify insights	**Empower teams**	Unlock the true value
The value we deliver	Automated collection	Data APIs	Identify trends Benchmark performance Dashboard (Prescient Voice)	**Centre-specific recommendations** **Automated monthly action plans** **Urgent notifications**	Custom consultancy

Major UK retail landlord.

Commencing collection in 2021, Prescient Research services have been implemented across 13 centres including all retail asset types: full price, outlet and inner-city centres.

Over the three years of measuring shopper sentiment, the portfolio-wide increase in sentiment is 11%, which equates to a significant change in shopper dwell time, frequency of visitation and on-site spend.

The evidence.

The program has been such a success that the NPS+ sentiment measure Prescient Research delivers is the top reported metric to assess customer performance.

13 centres
790,000 sqm

28,345
Customer responses

21,667
Improvement suggestions

1,162
Urgent notifications

+11%
Average sentiment improvement

NPS+ top reported metric

Credits

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01

Executive summary

Topline insights

Definitions

The following definitions are used throughout this report:

TRADITIONAL SHOPPING CENTRES

01

Super Regional

The largest centres, 140,000+ sqm, with a broad retail, dining, and entertainment mix, including flagship stores

02

Regional

Large centres, 75,000–140,000 sqm, featuring diverse retail, strong anchors, and leisure options

03

Major Town Centre

Medium-sized hubs, 37,000–75,000 sqm, serving as primary shopping destinations with national and local retailers

04

Town Centre

Smaller precincts, under 37,000 sqm, focused on high-street brands, convenience, and local services

DISCOUNT AND LARGE FORMAT

05

Retail Parks

Out-of-town destinations with big-box stores, homeware and electronics, designed for easy access and parking

06

Outlets

Discount-driven centres offering branded goods at reduced prices, positioned as destination shopping

COMPARISON GROUPS

07

UK Benchmark

The average score of all responses for all UK retail centres

08

Leading Centres

The top quartile of centres in the UK based on NPS+ performance

Executive summary

UK retail centre customer sentiment

01

Sentiment vs expectation gap

While overall sentiment is positive, many customers feel their experience does not exceed expectations, highlighting an opportunity for centres to elevate their service and offerings.

02

Strong loyalty, but weak differentiation

Most shoppers indicate they plan to return, but fewer see their preferred centre as significantly better than alternatives, making differentiation a key challenge for retail centres.

03

Demographic and centre type variations

Sentiment varies by customer group and centre type, with town centres and outlet malls performing well, whilst larger regional centres face higher expectations that are harder to meet.

The value of customer sentiment

04

Direct link between satisfaction and spend

A 1% increase in satisfaction leads to an average £38 increase in spending per visit, proving the financial impact of improving customer experience.

05

Increased visitation frequency

Higher satisfaction correlates with a 3.46x increase in annual visits, reinforcing the role of sentiment in driving footfall.

06

Return on investment

Any initiative that improves sentiment by 1% at a cost lower than £38 per visitor should be viewed as a sound investment for retail landlords.

Executive summary

Opportunities for improved sentiment

01

Close the fulfilment gap

76% of customers leave their preferred retail centre without feeling fully satisfied, and almost one in eight rate fulfilment below 6/10. Addressing unmet needs through a stronger retail mix, better services and added conveniences can increase loyalty and spending.

02

Improve specific touchpoints

Play areas, entranceways and seating ranked among the lowest-rated aspects of retail centres. For example, seating areas score in the bottom three touchpoints, indicating discomfort and lack of appeal. Upgrading cleanliness, comfort and accessibility in these spaces is an opportunity to improve sentiment.

03

Enhance wayfinding and signage

Confusion associated with navigating the centre negatively impacts satisfaction. Centres with clear signage and effective wayfinding tools perform better, and guest services see up to an 8% higher rating in preferred centres – suggesting that well-designed navigation contributes to better experiences.

04

Invest in service and retail staff engagement

High-performing centres differentiate themselves through service. Retailer in-store experiences have a 36% correlation with sentiment, meaning better-trained retailer staff and proactive customer assistance can drive higher overall satisfaction.

05

Increase personalisation and promotions

Higher sentiment correlates with increased spend, and the most satisfied customers spend an extra £38 per visit. Targeted promotions, loyalty rewards and tailored digital engagement can make visits feel more rewarding and increase basket size.

06

Create a more engaging atmosphere

Centres that offer seasonal activations, entertainment and interactive retail experiences perform better. Centre promotions and entertainment have a 20% correlation with overall sentiment, demonstrating the value of immersive experiences in boosting satisfaction.

02

How happy are customers with their retail centres?

Customer satisfaction with UK retail centres remains strong, yet the data indicates that many shoppers feel their expectations are not fully met.

The NPS+ metric indicates that while shoppers are generally satisfied, fewer feel their visit exceeded expectations. This highlights a gap between experience and aspiration, which landlords must address to retain and grow advocacy.

Encouragingly, loyalty remains high, with the majority of customers intending to return. The challenge for retail centres is to differentiate their offering, ensuring customers see their preferred destination as better than the competition.

How do we measure sentiment?

Net Promoter Score+ (NPS+) is a methodology developed by Prescient Research – tailored to suit retail landlords and physical places.

NPS+ measures more than a likelihood to recommend. It includes shopper satisfaction, their likelihood to return and whether customers view a retail centre as better than its competitors.

Combined, these scores form the NPS+ metric, offering a holistic measure of satisfaction designed specifically for physical places.

NPS+ Score = % Promoters – % Detractors

0	1	2	3	4	5	6	7	8	9	10
Detractors							Passives		Promoters	

NPS+ is expressed as a figure from -100 to +100

A **negative** score signifies there are more detractors than promoters.

A **positive** score signifies there are more promoters than detractors.

NPS+ Customer Sentiment Metrics

CSAT (CUSTOMER SATISFACTION)

Satisfaction

My most recent visit to your centre was satisfying.

TRADITIONAL NET PROMOTER SCORE (NPS)

Advocacy

I am likely to recommend your centre to family, friends and colleagues.

NPS (Net Promoter Score) measures the percentage of customers rating their likelihood to recommend a company, a product or a service to a friend or colleague. This measure was designed for fast-moving consumer goods by management consultancy Bain and Company.

+ SENTIMENT METRICS FOR PLACES

Fulfilment

My most recent visit provided everything I wanted.

Loyalty

I am likely to return to your centre in the future.

Preference

I think your centre is better than similar-sized shopping centres.

What is the sentiment of UK customers with their retail centres?

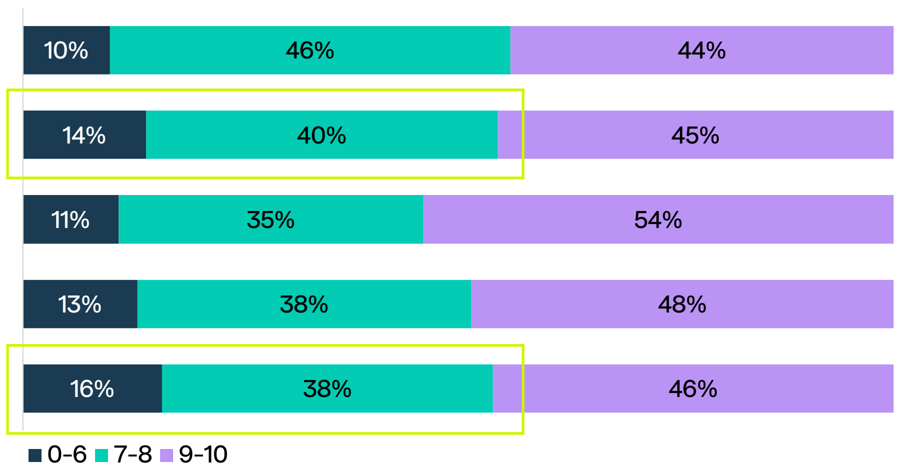
While overall sentiment scores are positive, the data highlights two aspects where it is more difficult to please customers: Fulfilment and Preference.

Satisfaction levels are good, with most shoppers reporting a positive experience. **Loyalty** is also strong, with a majority indicating they will return.

Advocacy performs slightly lower, suggesting fewer customers see their retail centre as significantly better than alternatives.

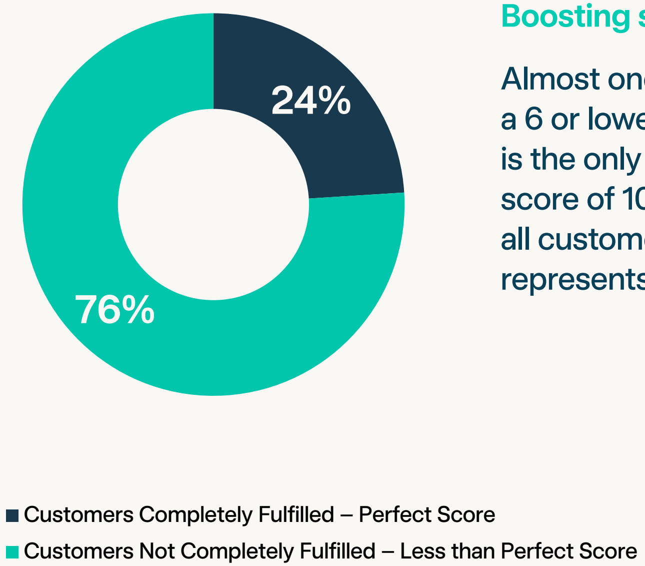
With more than **one in ten customers rating each metric 6 or below**, the opportunity lies in closing the expectation gap, ensuring that retail centres not only meet but exceed customer expectations, turning satisfied shoppers into loyal advocates.

NPS+ Statements 2025



		Mean Score (out of 10)	NPS Score (out of 200)
Satisfaction	My most recent visit to your centre was satisfying.	8.2	34
Fulfilment	My most recent visit provided everything I wanted.	8.0	31
Loyalty	I am likely to return to your centre in the future.	8.4	43
Advocacy	I am likely to recommend your centre to family, friends and colleagues.	8.2	35
Preference	I think your centre is better than similar-sized shopping centres.	8.0	30

The main opportunity lies in understanding why customers do not feel that they obtained ‘everything that they wanted’ from their most recent shopping experience.



Boosting sales by addressing ‘Fulfilment’

Almost one in eight customers rated their ‘Fulfilment’ a 6 or lower, but a more enlightening statistic is the only one-quarter that rated this a perfect score of 10/10. This implies that three-quarters of all customers are not completely satisfied, which represents a significant upsell opportunity.

What is driving dissatisfaction with ‘Fulfilment’? – our hypothesis

As online retailers continue widening their range of products, customers transfer these expectations to physical retail centres. In response, ask yourself:

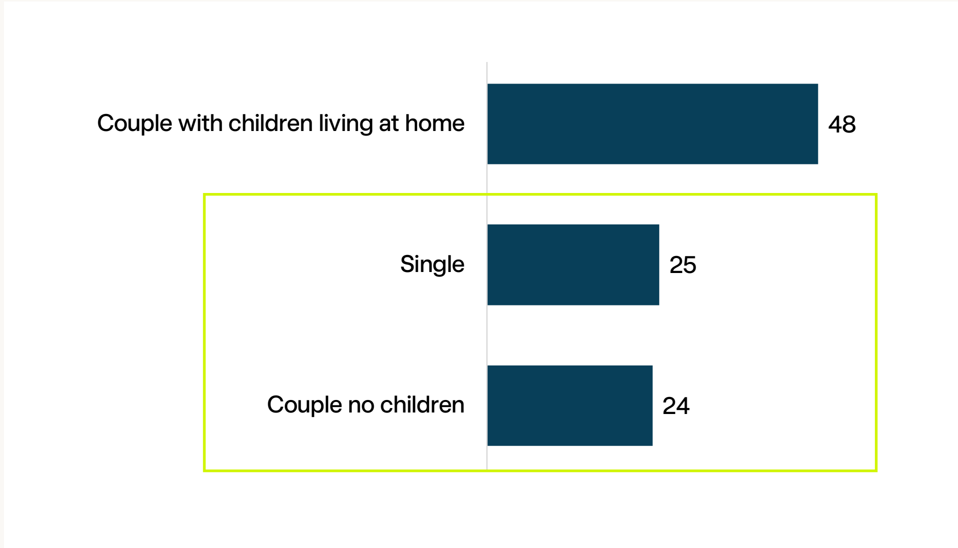
- Do you have the ideal retail/brand mix?
- Are there any temporary activations that could satisfy your customers without introducing new brands?
- Are there any services that could provide a more complete retail mix?

How does sentiment differ by living situation?

When examined by living situation, **NPS+** performs much higher amongst Couples with children living at home. In contrast, Singles and Couples without children have lower levels of satisfaction. This could reflect a strong focus on delivering family-friendly experiences within retail centres.

A future opportunity is to explore how centres can better satisfy Singles and Couples who may well have greater disposable income.

NPS+ by Living Situation



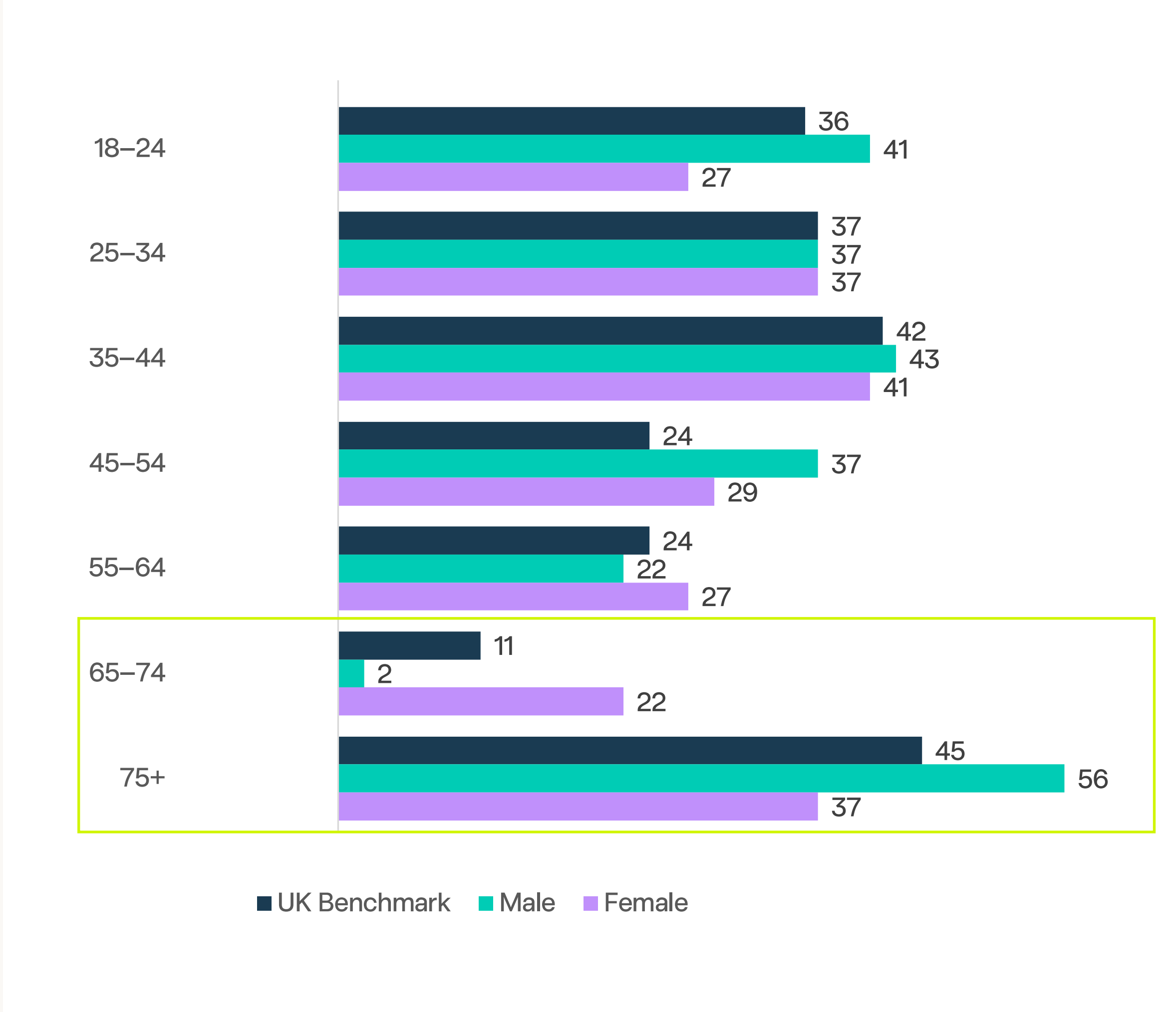
Singles and Couples without children have much lower levels of satisfaction compared to those with children.

How does sentiment differ by age and gender?

Overall, there is a trend towards lower NPS+ as we age, hitting its lowest at 65-74 years before increasing significantly again at 75 years+.

Males aged 65-74 years reported the lowest NPS+ of all demographic groups.

NPS+ by Age



How has sentiment changed over time?

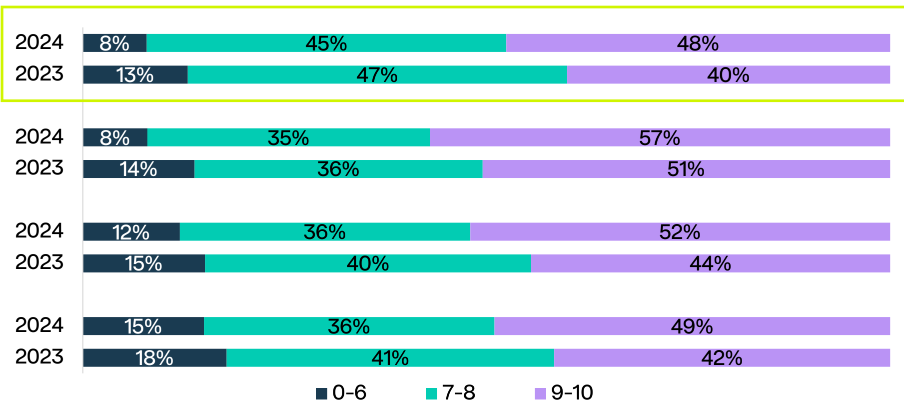
The latest NPS+ data reveals a solid year-on-year increase in customer sentiment across all metrics. However, key performance indicators vary across different shopper demographics and centre types.

Overall **Satisfaction** has increased the most between 2023 and 2024, up by a modest 3% by mean score, but 13 points using a NPS scale (promoters minus detractors).

The other three metrics also increased in a similar manner over the past two years. In previous years, a NPS of +40 would represent a very high performing centre. However, with improvement in the past year, this score is now aligned with the UK Benchmark.

Adjusting to more positive customer sentiment can pose a challenge for retail landlords aiming to outperform national benchmarks.

NPS+ Statements – 2024 vs 2023



Metric	Statement	Year	0-6	7-8	9-10	Mean Score (out of 10)	NPS Score (out of 200)
Satisfaction	My most recent visit to your centre was satisfying.	2024	8%	45%	48%	8.3	40
		2023	13%	47%	40%	8.0	27
Loyalty	I am likely to return to your centre in the future.	2024	8%	35%	57%	8.5	49
		2023	14%	36%	51%	8.2	37
Advocacy	I am likely to recommend your centre to family, friends and colleagues.	2024	12%	36%	52%	8.3	40
		2023	15%	40%	44%	8.0	29
Preference	I think your centre is better than similar-sized shopping centres.	2024	15%	36%	49%	8.1	34
		2023	18%	41%	42%	7.9	24

Please note: The 'Fulfillment' statement was not asked prior to 2024.

Now let's explore NPS+ by retail centre type, as defined by their size (GLA), or the type brands/product they offer.

Traditional Retail Centres

Super Regional

The largest centres, 140,000+ sqm, with a broad retail, dining and entertainment mix, including flagship stores

Major Town Centre

Medium-sized hubs, 37,000–75,000 sqm, serving as primary shopping destinations with national and local retailers

Regional

Large centres, 75,000–140,000 sqm, featuring diverse retail, strong anchors and leisure options

Town Centre

Smaller precincts, under 37,000 sqm, focused on high-street brands, convenience and local services

Large Format Retail Centres

Retail Park

Out-of-town destinations with big-box stores, homewares and electronics, designed for easy access and parking

Outlet Centre

Discount-driven centres offering branded goods at reduced prices, positioned as destination shopping

Which centre types have the happiest customers?

Customer satisfaction varies slightly across different retail centre typologies.

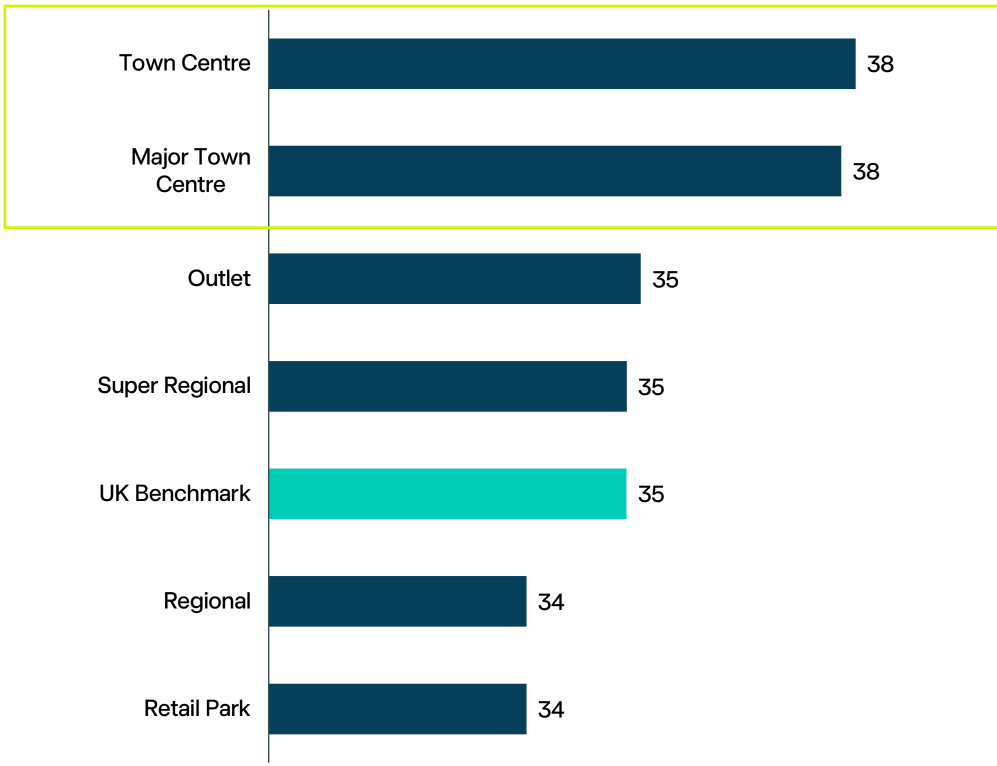
Town Centres and Major Town Centres – the smallest traditional retail centres – emerge as the top-performing formats, scoring highest in NPS+ .

Outlet Centres also perform well overall, benefitting from their value-driven appeal and strong retail mix.

Retail Parks, while achieving similar sentiment, continue to face challenges related to 'Fulfilling needs' and 'Likelihood to return' (two of the five NPS+ metrics). This is likely due to customers travelling further to these locations with specific purchasing intent.

NPS+ by Centre Typology

Scores in NPS format (-100 to +100)



Compared to all other types, Outlet customers indicate the strongest levels of 'Loyalty' – intention to return (47% Net Agreement).

However, Outlet customers are also the most likely to have very low 'Fulfilment' – needs unfulfilled (27% Net Agreement).

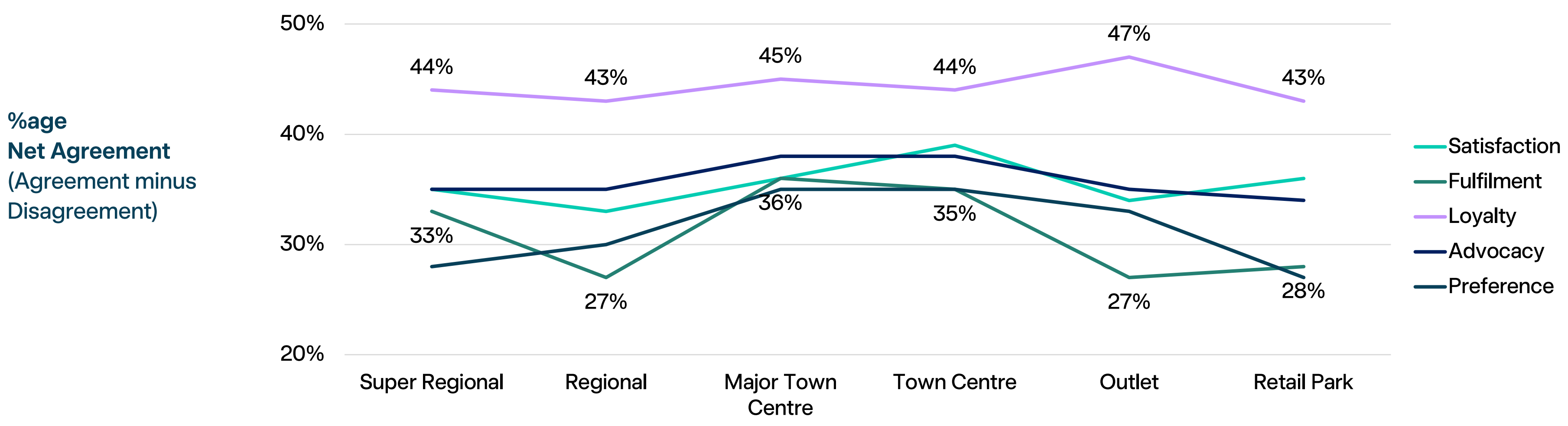
How do the NPS+ metrics differ by centre type?

Loyalty – the likelihood of returning to the centre – has the highest levels of Net Agreement across all centre types.

In contrast, Net Agreement with Fulfilment and Preference are both low. Outlet and Regional centres report the lowest levels of **Fulfilment** at 27% Net Agreement, which suggests many customers are leaving with their needs unfulfilled.

The data also suggests that centre size relates to **Preference** for that centre. The larger the centre, the less likely customers are to prefer that centre when compared with other similar-sized centres. This implies that as centres increase in size, customers are less likely to recognise the differences between centres. As such, successfully differentiating and shifting customer visitation between larger centres is likely to be more challenging.

NPS+ Statements – by Centre Type



Customers respond to the survey based on their most recent shopping experience.

They are then asked whether this most recent shopping experience was at their **Preferred Centre**, or at a **Non-Preferred Centre**.

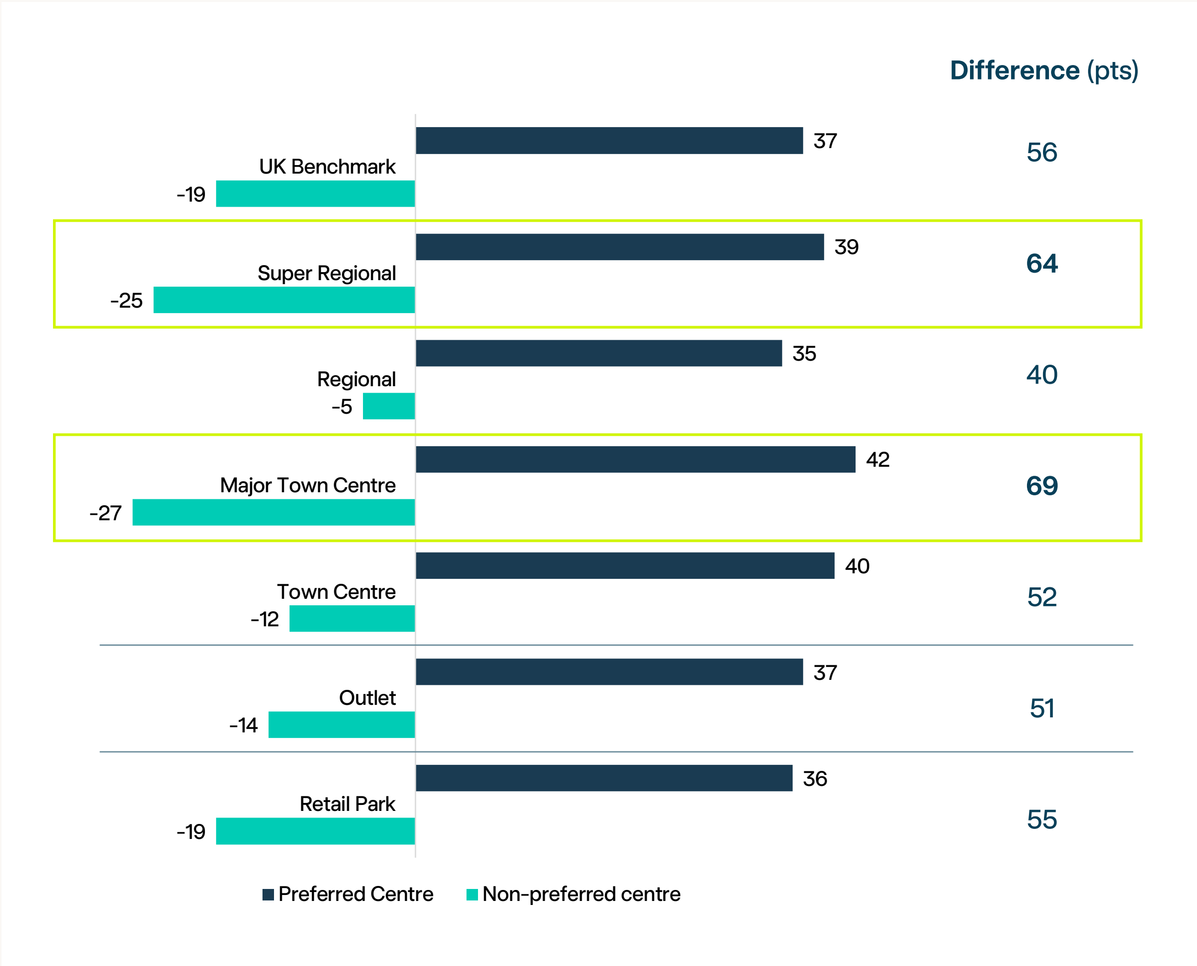
How does customer sentiment change when comparing Preferred and Non-Preferred centres?

There is a significant difference between the customers' sentiment when comparing their perceptions of their 'Preferred' and 'Non-Preferred' centres.

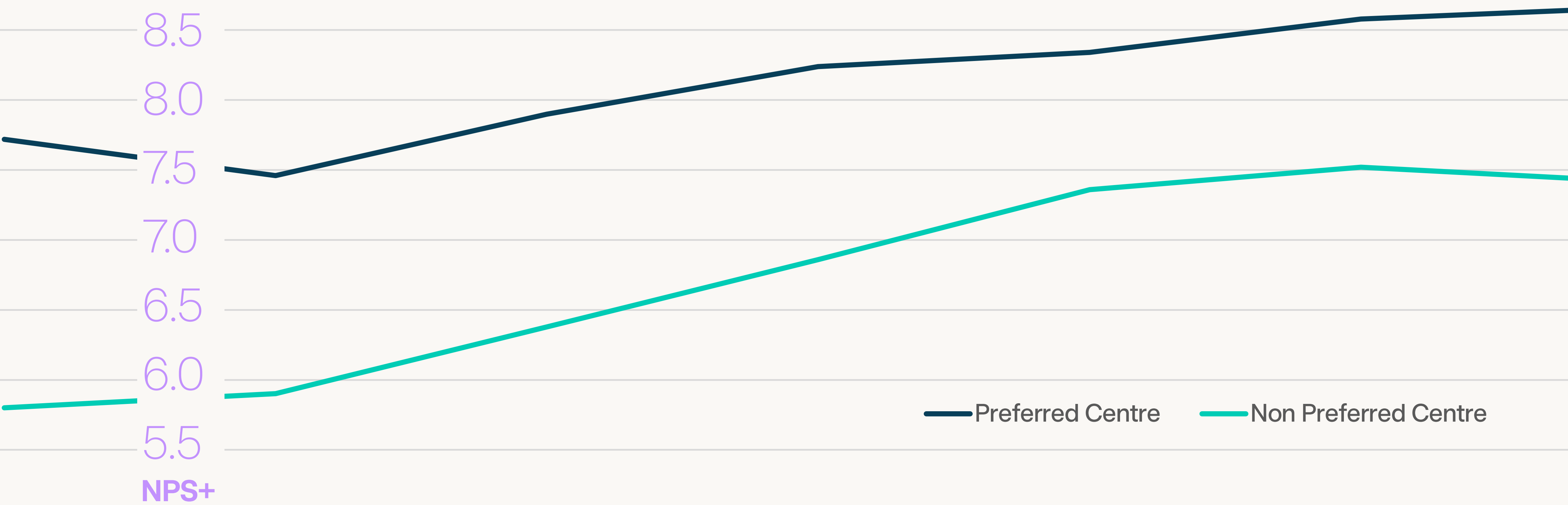
Overall, the differences are generally around 50-60 points (25-30%). **Major Town Centres** (69 points) and **Super Regional** centres (64 points) represent the largest differences. This suggests closing the gap between being the Preferred and Non-Preferred centre is particularly challenging for these two centre sizes.

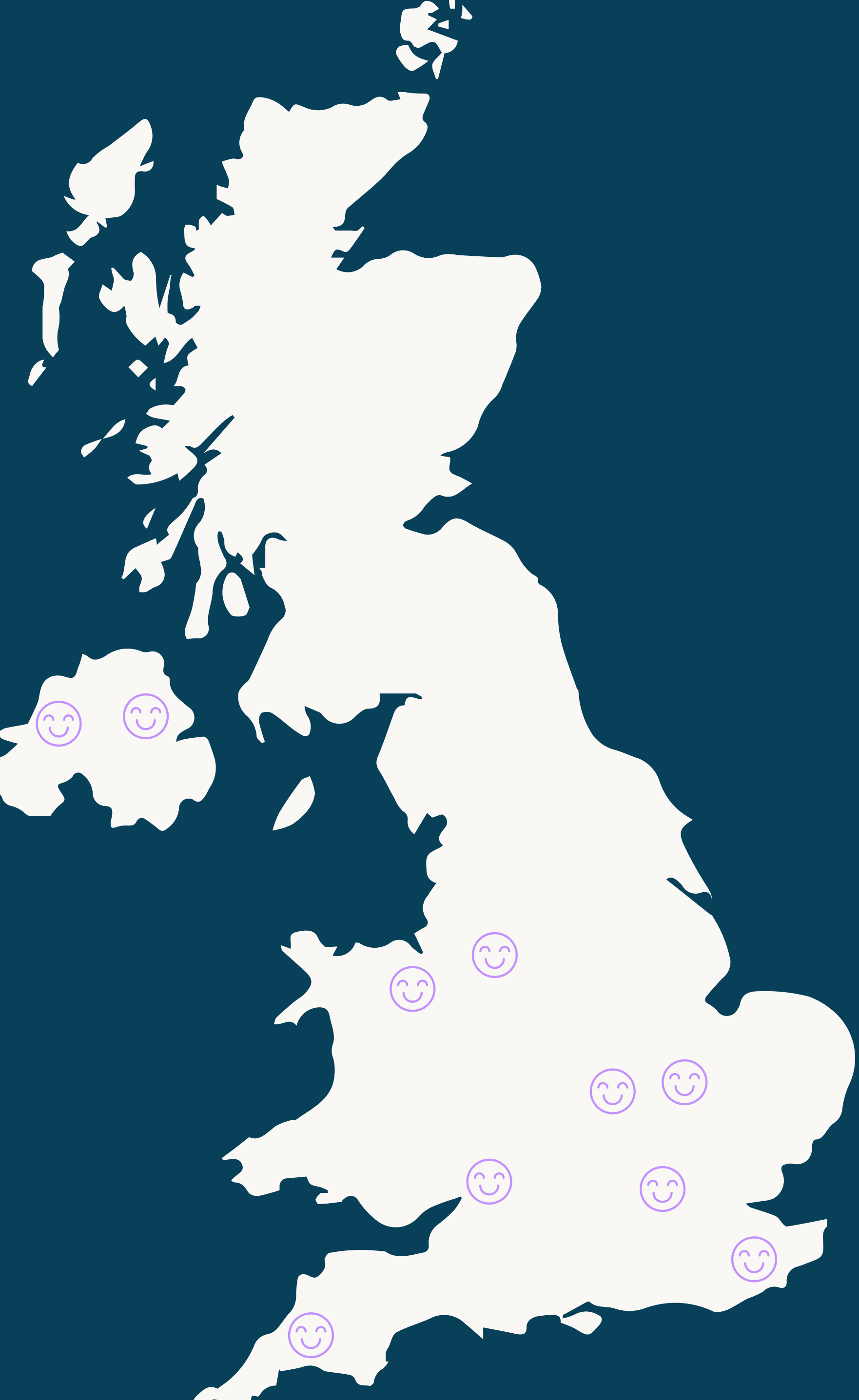
NPS+ by Preferred and Non-Preferred Centre

Scores in NPS format (-100 to +100)



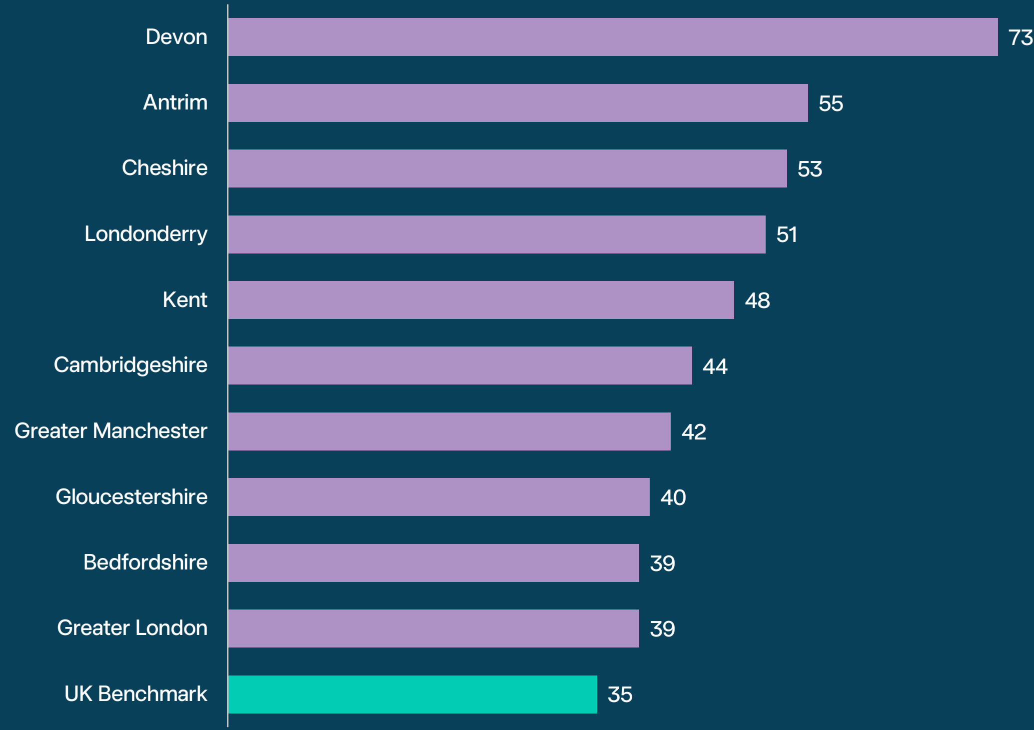
Regardless of spend category, customers at Non-Preferred Centres are consistently less positive.





Where are the happiest customers?

There appears to be a skew towards centres in counties which are more Southern, near coastal areas or in Northern Ireland.



03

How valuable is customer satisfaction?

The evidence is clear: more satisfied customers spend more.

The most satisfied customers are the biggest spenders – and spend data indicates an increase £38 per visit for every 1% increase in satisfaction.

The most satisfied customers are also the most regular visitors – the data indicates that they visit their centre 3.46 times more often for every 1% increase in satisfaction.

Centres that ascertain exactly what satisfies their customers and invest accordingly, are able to unlock increased loyalty and spend.

The data indicates that satisfaction and spend are strongly correlated.

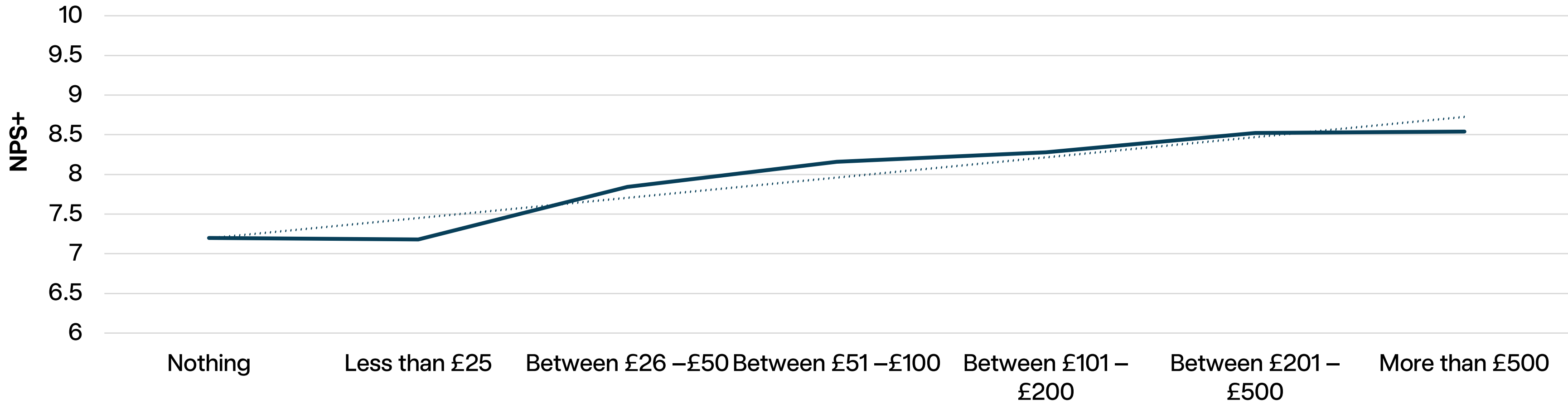
The data reveals that the most satisfied customers spend over £38 each visit.

There is no difference in sentiment between spending 'Nothing' and 'Less than £25'. However, for all amounts greater than £25, the sentiment gradually increases. Whilst spend might be driving sentiment, it is more logical that sentiment is driving spend.

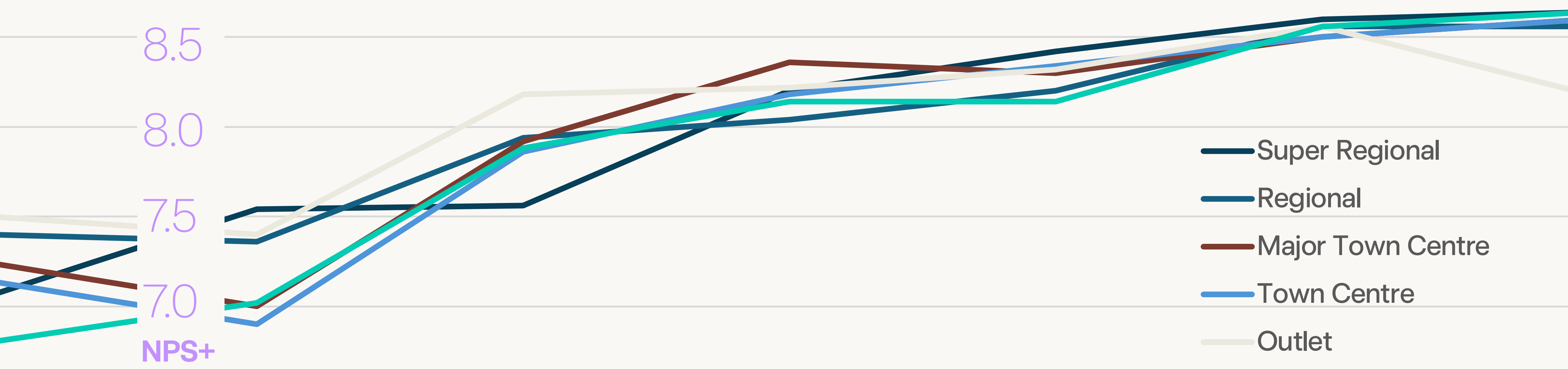
For every 1% increase in NPS+, spend increases by £38.46 per visit.

Mean NPS+

For each spending group – out of 10.



Regardless of centre type, a clear relationship between sentiment and spend exists.



A 1% increase in sentiment equates to a £38 increase in spend. Therefore, any investment which improves the customers' sentiment by 1%, and costs less than £38 per visitor to implement, should be viewed as a good investment.

How does positive sentiment drive visitation?

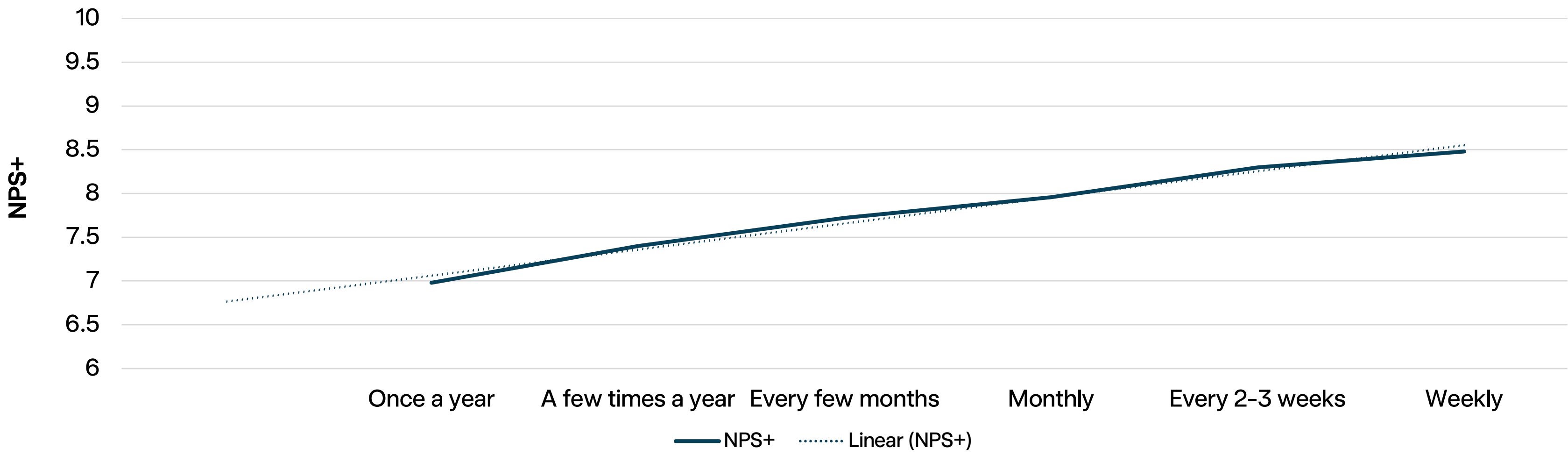
Similar to spend, there is a strong relationship between sentiment and frequency of visitation.

The evidence is clear – for every 1% increase in sentiment (as measured by NPS+), there is an increase in visitation by 3.46 times. For example, if a customer visits only twice per year, a 1% increase in that same customer's sentiment will likely increase their visitation to 7 times per year.

For every 1% increase in satisfaction, customers are likely to visit 3.46 times more during the year.

Mean NPS+

For each visitation frequency – out of 10.



04

What factors are most related to sentiment?

We use linear regression to determine which touchpoints and themes most strongly relate to customer sentiment.

Those factors that correlate more strongly could be interpreted as being more important for supporting a positive perception of the customers' retail centre experience. Those with a weaker relationship to sentiment should not be viewed as unimportant. Rather, they are merely less likely to directly drive positive sentiment.

Which touchpoints drive positive sentiment?

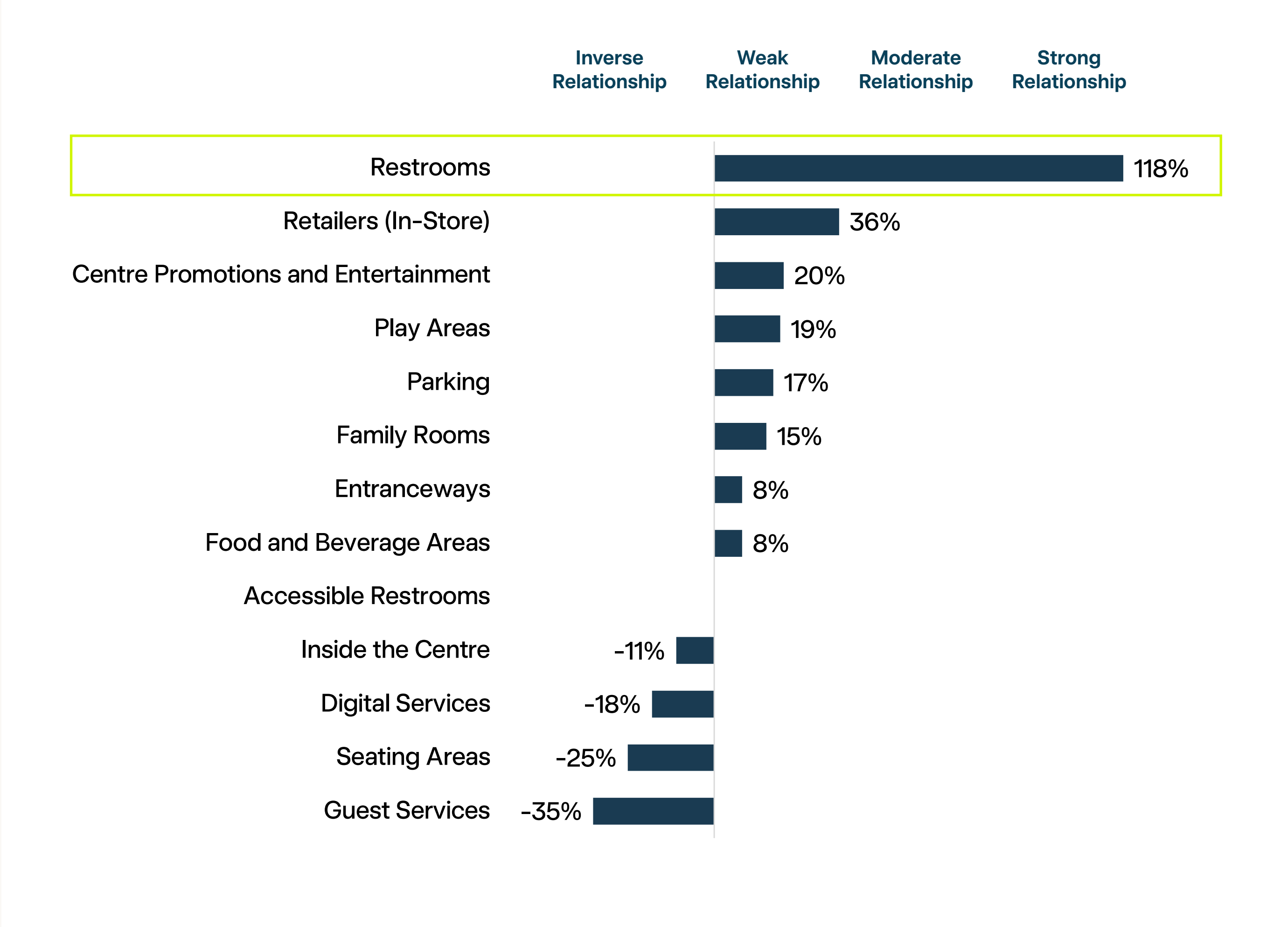
While most touchpoints have a positive relationship with sentiment, some have an inverse relationship.

Linear regression finds the best-fitting straight line between two variables, showing their relationship and allowing predictions based on how one variable influences the other.

An inverse (or negative) relationship indicates that the more positive the customer is overall (NPS+), the less likely they are to be satisfied by that touchpoint.

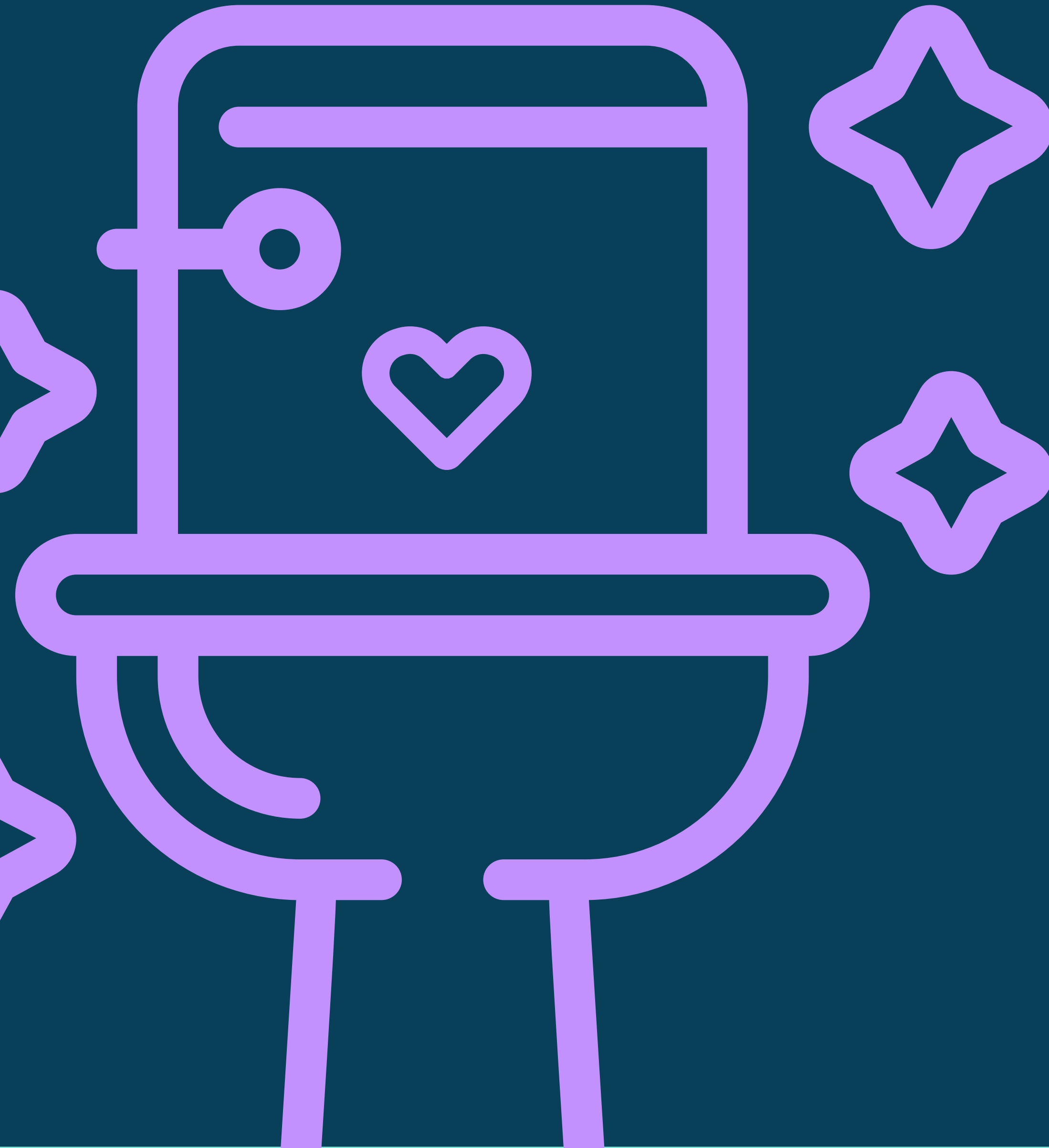
Thus, customers with very positive sentiment are less likely to be satisfied by Guest Services, Seating Areas Digital Services and the experience Inside the Centre, possibly indicating high expectations associated with these touchpoints.

Strength of Relationship Between Touchpoints and Sentiment
(%age relationship between the touchpoint scores and NPS+)



The importance of great restrooms

Our research suggests that if your customers are happy with the restroom experience it is highly likely they will have a positive sentiment towards the overall retail centre.



What are the top drivers of sentiment by centre type?

Whilst overall, great restrooms are strongly related to positive experience, this can vary by centre typology.

Restrooms remain most influential for **Super Regionals and Retail Parks.**

For Regionals, Play Areas have a stronger relationship.

For Major Town Centres, Centre Promotion and Entertainment plays a stronger role.

For Town Centres, Parking has the strongest relationship.

And for Outlet Centres, the In-store Retail experience is most associated with satisfaction.

Satisfaction Drivers Overall by Centre Type

Traditional Retail Centres

Super Regional

Restrooms
Parking
Play Areas

Major Town Centre

Centre Promotion and Entertainment
Retailer (In-store)
Restrooms

Regional

Play Areas
Centre Promotions and Entertainment
Restrooms

Town Centre

Parking
Restrooms
Retailer (In-store)

Large Format Retail Centres

Retail Park

Restrooms
Retailer (In-store)
Play Areas

Outlet Centre

Retailer (In-store)
Centre Promotions and Entertainment
Restrooms

04

How do retail centre touchpoints perform?

Touchpoints are distinct elements of the retail centre experience within the customer journey. In addition to asking about the sentiment, we also ask about the performance of specific ‘touchpoints’.

The results provide an indication of those aspects of the experience which are performing well and those which are not. These insights empower you to identify strengths and address any weakenesses within the customer experience.

How do individual touchpoints perform with customers?

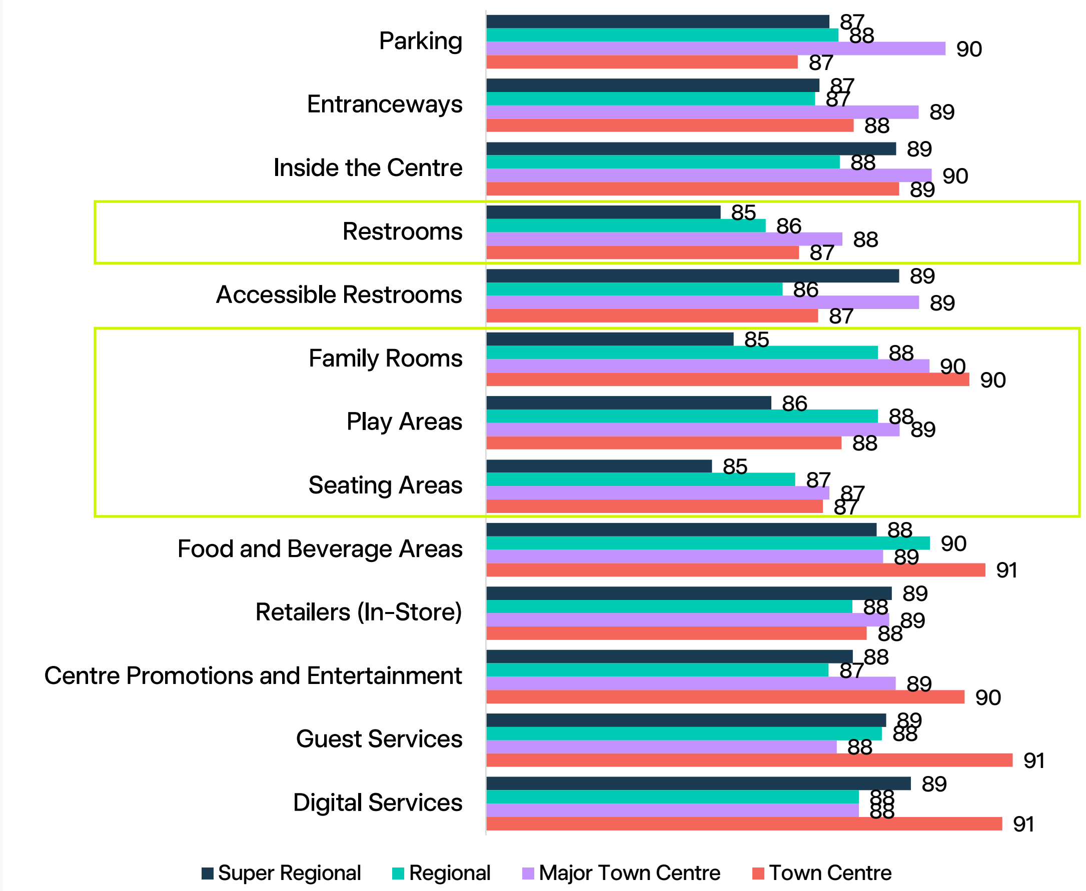
Touchpoint scores indicate challenges for Super Regional centres in managing high traffic and even higher customer expectations.

Although there is tight scoring across all four centre types, one area of deviation exists for **Super Regionals**. The touchpoints which drop below 87 are Restrooms, Family Rooms, Play Areas and Seating Areas.

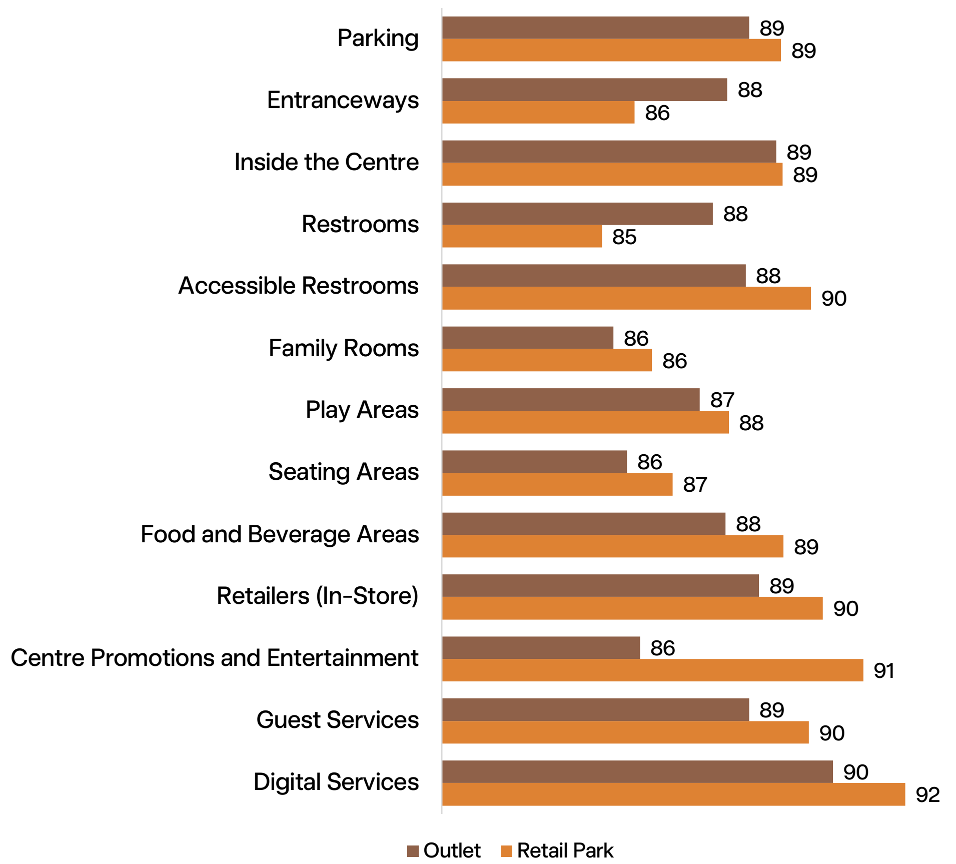
Inversely, **Town Centres** perform above 90 for Food and Beverage Areas, Guest Services and Digital Services.

The Size-Prestige Heuristic is a cognitive shortcut where consumers perceive larger places as better, more valuable and prestigious, assuming greater size means higher quality and superior offerings.
These much higher expectations of Super Regional centres can be harder to meet, hence the lower satisfaction with key touchpoints.

Touchpoint Satisfaction – Traditional Retail Centres (out of 100)



Touchpoint Satisfaction – Retail Parks and Outlet Centres (out of 100)



How do individual touchpoints perform with customers?

Touchpoint scoring for Retail Parks and Outlet Centres is similar to traditional centres. The range of scoring is very tight, ranging only 7 points (85 to 92).

For **Retail Parks**, the lower scoring touchpoints are Restrooms (85), Entranceways (86) and Family Rooms (86). While the higher scoring are Digital Services (92), Centre Promotions and Entertainment (91). In fact, Digital Services at Retail Parks is the highest of all the typologies.

For **Outlet Centres**, the lower scoring touchpoints are Family Rooms (86), Seating Areas (86) and Centre Promotions and Entertainment (86). While the higher scoring touchpoints are Digital Services (90), Guest Services (89) and Parking (89).

In our research, customers are asked how each of the touchpoints could be improved.

?

Q

‘What one change would you make to improve the experience of this touchpoint?’

How could retail centres improve the experience for the lowest scoring touchpoints?

The themes below have been distilled from over 1,254 individual comments asking customers to provide improvement feedback.

Play Areas

Cleanliness and maintenance

Regular cleaning and upkeep to keep play areas safe and hygienic for children. Well-maintained equipment reduces wear and tear.

Interactive and diverse

More diverse play equipment and interactive features to cater to different age groups and keep children entertained

Supervision and safety

Staff presence, secure fencing and soft surfaces to ensure a safer play environment and provide reassurance for parents

Entry Areas

Clear signage and wayfinding

Well-placed, visible signage making it easier for visitors to navigate key areas such as parking, restrooms and major stores.

Open and efficient entry points

Automated doors, wider access points and touchless entry for a smoother, more accessible experience

Tidiness and aesthetic appeal

Clean, well-maintained and welcoming entrances that create a positive first impression

Seating Areas

Comfortable and ergonomic

Seating with cushioning, back support and ergonomic design to enhance visitor comfort.

Spacious seating and quiet zones

More room between seats and designated quiet zones for those seeking a break from the shopping experience

Consistent aesthetic

Thoughtfully designed seating areas that complement the shopping centre’s overall look and feel

Which touchpoints perform better at customers' preferred centres?

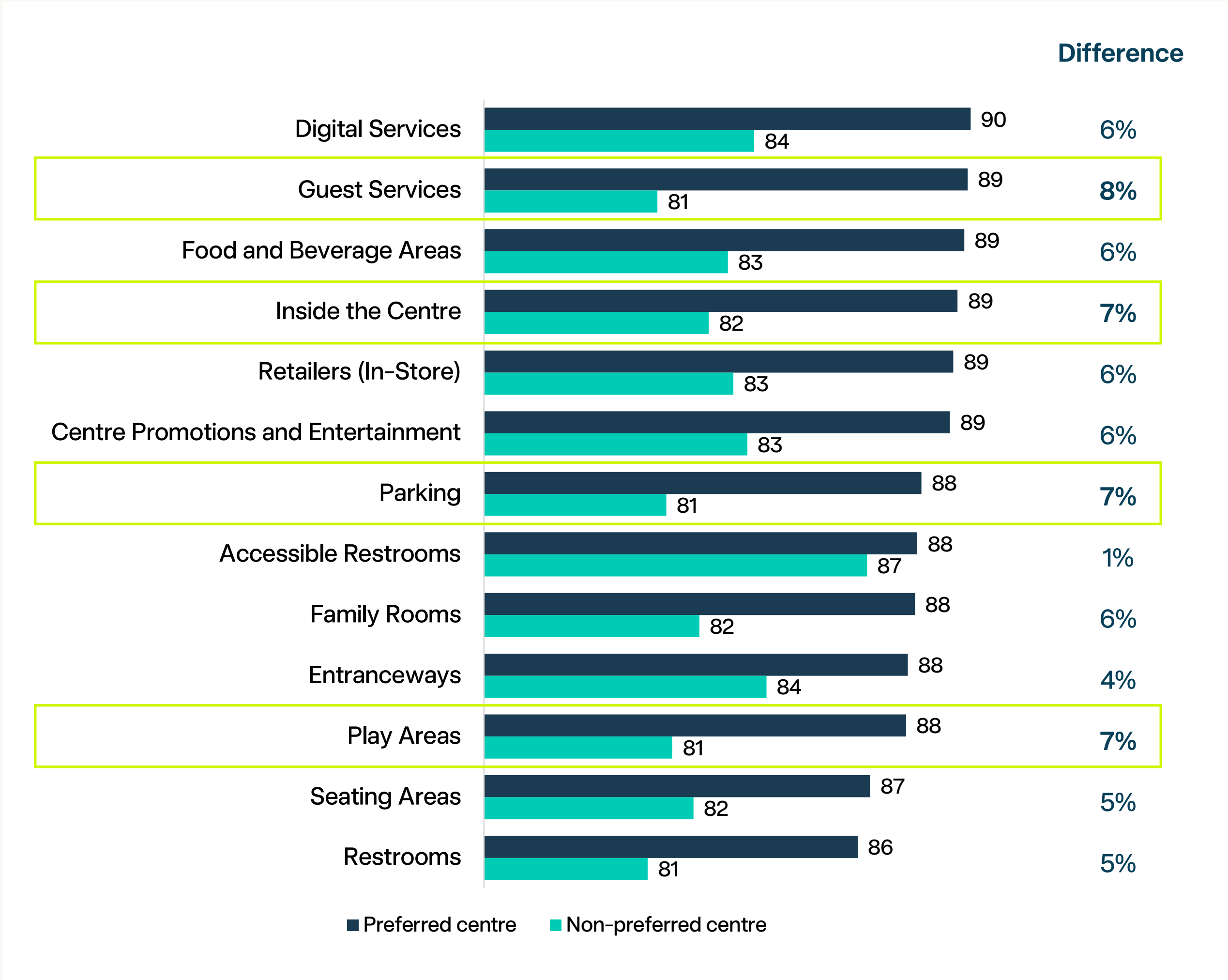
Whilst the Preferred centres outperform the Non-Preferred centres on every touchpoint, the difference varies significantly.

The touchpoints that perform better at preferred centres include:

- Guest Services (8%);
- Inside the Centre (7%);
- Parking (7%); and
- Play Areas (7%).

For centres looking to increase market share these four touchpoints are potentially the most influential.

Touchpoint Satisfaction: Preferred vs Non-Preferred Centre (out of 100)



What are experience themes?

In addition to answering questions about touchpoint performance, customers are also asked about experiential themes. Unlike touchpoints, these six themes are present across the customer experience.

Cleanliness

ENTRANCEWAYS – RESTROOMS – FAMILY ROOMS – FOOD AREAS

The touchpoint is clean and well presented.

Safety

PARKING – ENTRANCEWAYS – RESTROOMS – FAMILY ROOMS

The touchpoint is safe.

Maintenance

SEATING AREAS – ENTRANCEWAYS – RESTROOMS – INSIDE THE CENTRE

The touchpoint is well maintained and in good working order.

Design

SEATING AREAS – RESTROOMS – FAMILY ROOMS – FOOD AREAS

The touchpoint is well designed and suited to my needs.

Service

GUEST SERVICES – DIGITAL SERVICES

The touchpoint offers a good level of service.

Experience

GUEST SERVICES – DIGITAL SERVICES – INSIDE STORES – CENTRE PROMOTIONS

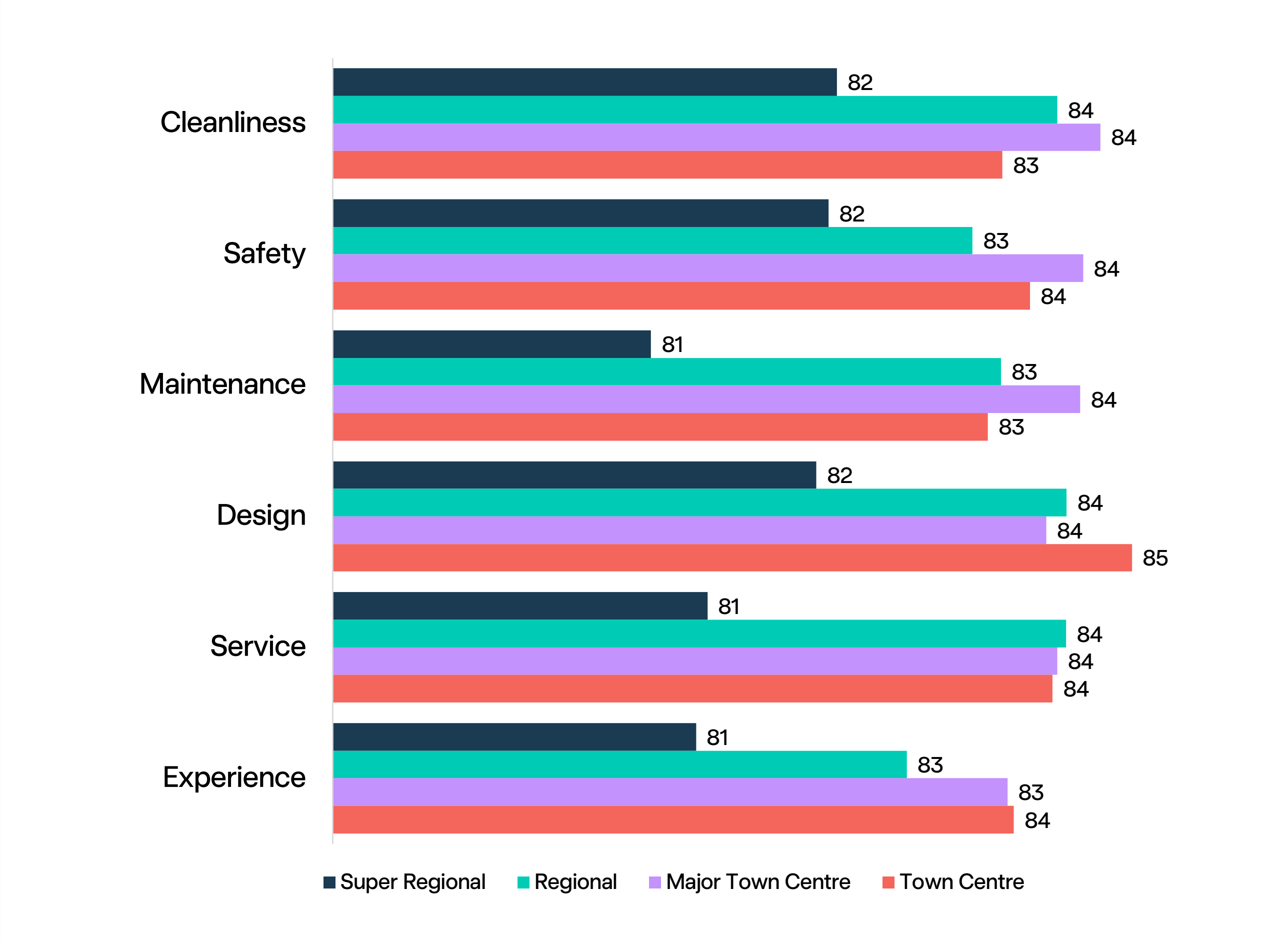
The touchpoint provides a positive experience.

How do the traditional retail centres perform across the six themes?

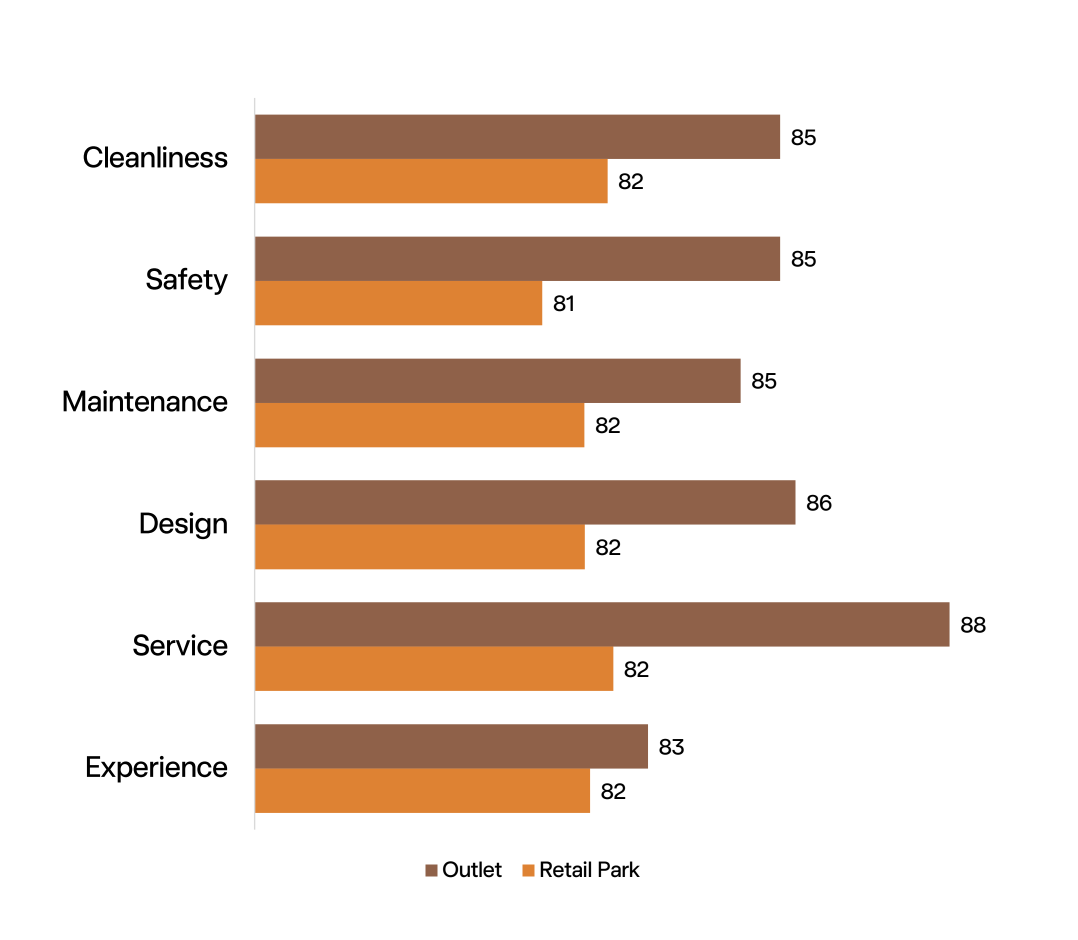
Whilst variation is slight, Super Regional centres consistently under-perform across all metrics.

It could be argued that Cleanliness, Maintenance and Safety are harder to deliver for **Super Regionals**. However, inversely, Design, Service and Experience should be easier to deliver. This provides an opportunity to question what is influencing this lower performance and can it be addressed.

Thematic Satisfaction (out of 100)



Thematic Satisfaction (out of 100)



How do the traditional retail centres perform across the six themes?

The performance of Outlet Centres is notably higher than Retail Parks and all the other typologies.

Surprisingly, the data indicates that Service at **Outlet Centres** is very high – at least four points above all other retail types. This trend continues for Design, Cleanliness, Maintenance and Safety, all of which Outlet Centres are the highest performing typology.

Conversely, **Retail Parks** perform consistently low with all scores tightly clustered between 81-82/100.

05

How do the Leading Centres differ?

In diagnosing how centres can improve customer sentiment, it is worth reviewing the top-performing centres for inspiration.

In the following section, we have compared the top quartile (25%) of high-performing centres to the general UK Benchmark.

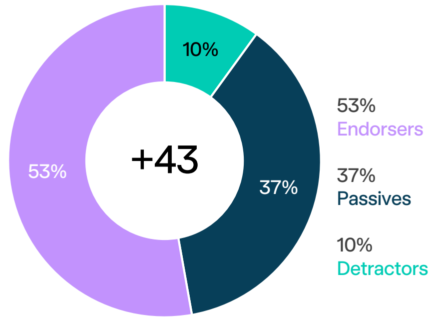
How does the sentiment of Leading Centre customers differ from the UK Benchmark?

When comparing the NPS+ breakdown of Endorsers, Passives and Detractors of Leading Centres vs the UK Benchmark, slight shifts of between 2-3% make the difference.

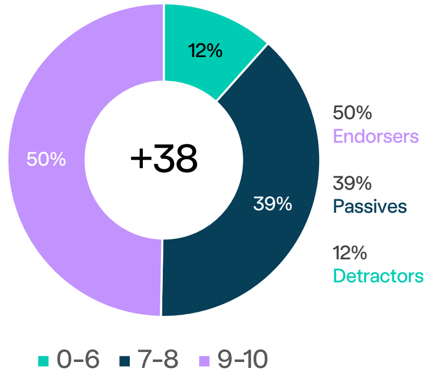
Leading Centres have 3% more Endorsers, and 2% fewer Passives and Detractors, which together deliver an improvement in performance of 5 points (+38 to +43).

Leading Centres have 3% more Endorsers, 2% fewer Passives and Detractors.

NPS+ Leading Centre



NPS+ UK Benchmark

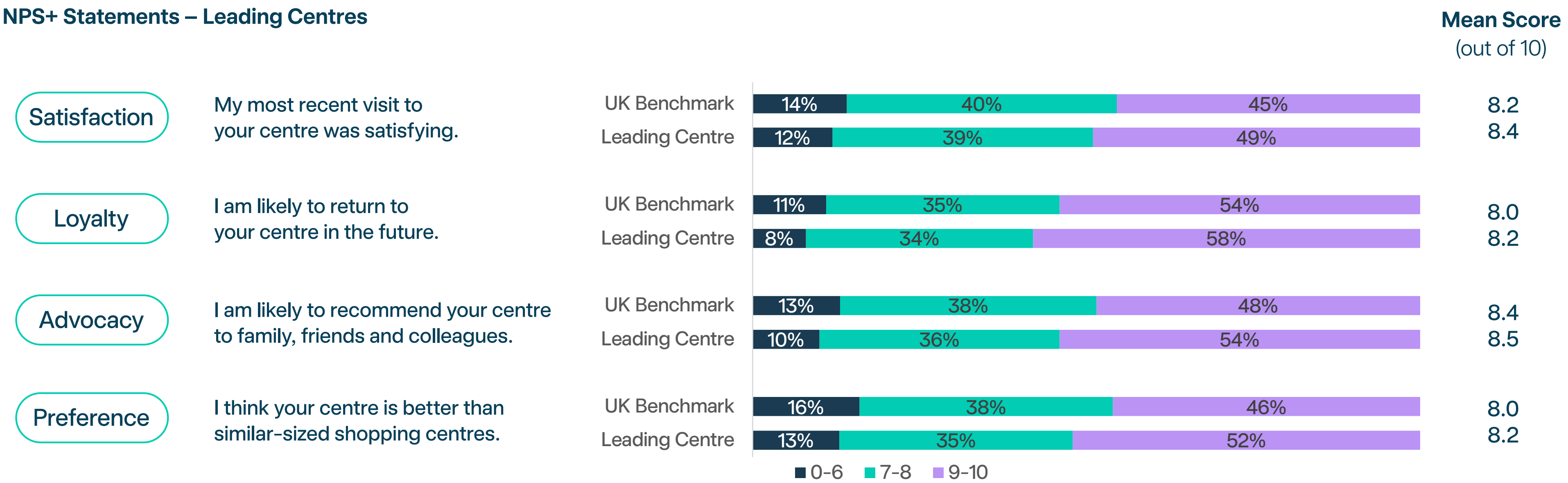


How do the Leading Centres compare across the NPS+ metrics?

Leading Centres provide a consistently better experience for customers across all metrics.

For average centres looking to improve, these findings suggest 'consistency' of experience is key.

NPS+ Statements – Leading Centres



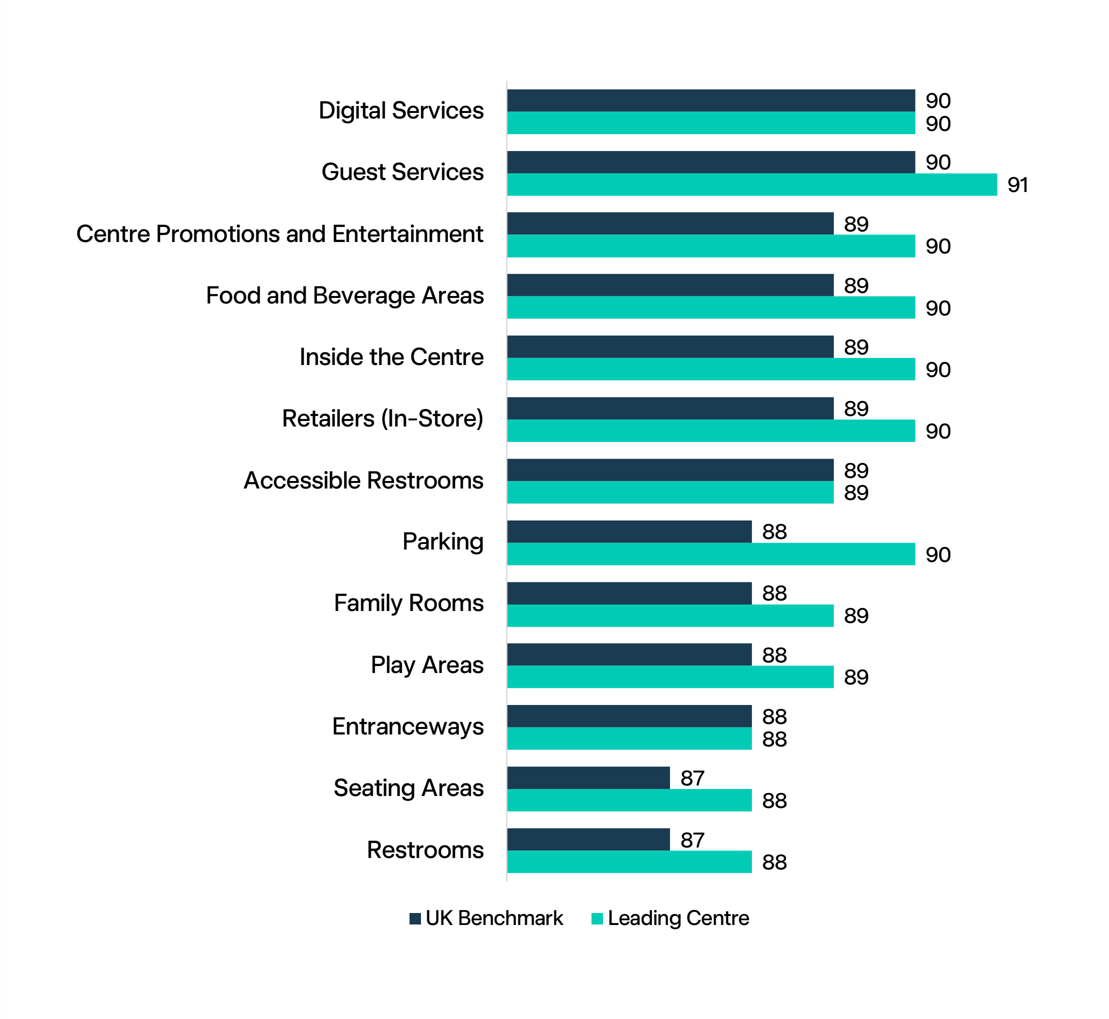
Please note: The 'Fulfillment' statement was not asked prior to 2024.

How do Leading Centres differ from the UK Benchmark across the various touchpoints?

Leading Centres offer a superior experience across all but two touchpoints: Digital Services and Accessible Bathrooms.

Across the board, Leading Centres consistently marginally outperform the benchmark by one point, with the exception being Parking, where Leading Centres out perform by two points.

Touchpoint Scores – UK Benchmark vs Leading Centre (out of 100)



06

Want to know more about your centre?

While the insights in this report represent one of the most comprehensive studies on UK retail centres, your centre will have its own unique contextual challenges.

Please contact us if you would like to know how your centres performed against the UK Benchmark.

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APPENDIX

Where are the customer opportunities (by centre type)?

Nuanced sentiment differences exist for each centre type creating differentiated customer opportunities.

The following pages offer topline summaries for each Centre type: Super Regional, Regional, Major Town Centres, Town Centres, Outlet Centres and Retail Parks.

It is a synthesis of the quantitative data and customer comments. These findings highlight the highest performing factors that are driving sentiment as well as opportunities for improvement.

Super Regionals

Super Regional Centres offer the most comprehensive shopping experience, but their scale makes it harder to meet high customer expectations. While they score +35 NPS+, preference scores are lower than smaller centres, suggesting challenges for differentiation.

Highest performing factors supporting satisfaction

- A wide variety of flagship stores and exclusive retail offerings
- A strong mix of dining, leisure and entertainment options
- High foot traffic driven by destination appeal, with an average +38% preference from returning customers
- Well-integrated public transport access and parking availability

Opportunities for improvement

- Wayfinding and navigation can be challenging due to centre size, with signage satisfaction at 86/100.
- Customer experience touchpoints, such as restrooms (87/100) and seating (88/100), score lower than smaller centres.
- Personalisation and tailored promotions are less effective in larger spaces.
- High expectations mean differentiation from other large centres is crucial.

Regionals

Regional Centres attract a diverse shopper base but struggle with fulfilment, as 27% of customers leave without feeling their needs were fully met.

Highest performing factors supporting satisfaction

- Strong anchor retailers and a balanced mix of national and local brands
- Good accessibility, often featuring ample parking (88/100) and major transport links
- Dining and entertainment offerings, with food and beverage areas rated 90/100
- High customer retention rates and repeat visits, with +40 NPS+

Opportunities for improvement

- Customers report lower fulfilment scores, with only 27% net agreement
- Limited differentiation compared to similar-sized centres
- Lack of premium and unique offerings that could elevate sentiment
- Potential to improve restrooms (85/100) and seating (86/100)

Major Town Centres

Major Town Centres perform well due to their role as primary shopping destinations, scoring +37 NPS+, but must focus on enhancing customer experience.

Highest performing factors supporting satisfaction

- Convenient locations within town centres, offering strong foot traffic
- Well-balanced mix of high-street brands and essential services
- Competitive pricing and promotions attract regular visitors
- Strongest performance in customer loyalty and preference, with loyalty net agreement at 41%

Opportunities for improvement

- Wayfinding and entrance design (86/100) could be enhanced to improve accessibility
- Play areas and family-friendly amenities score lower than expected (85/100)
- Digital services, including online engagement and mobile integration, lag behind larger centres
- Opportunity to improve event programming to create a more engaging atmosphere

Town Centres

Town Centres score the highest for satisfaction, with an NPS+ of +38, but their smaller scale limits customer fulfilment compared to larger retail formats.

Highest performing factors supporting satisfaction

- Strong community appeal with a localised, convenient offering
- High performance in customer service and retail staff engagement
- Positive shopper sentiment towards food and beverage areas (91/100)
- Well maintained and accessible, with a focus on ease of navigation

Opportunities for improvement

- Limited retail diversity results in shoppers seeking additional options elsewhere
- Seating areas (88/100) and play spaces (85/100) underperform in customer satisfaction
- Expansion of experiential retail and events could further drive engagement
- Parking and transport access could be optimised to accommodate demand

Retail Parks

Retail Parks are highly rated for convenience and accessibility, scoring +34 NPS+, but struggle with fulfilment due to their specialised retail mix.

Highest performing factors supporting satisfaction

- Easy access and ample parking make them attractive to shoppers with specific purchase intent.
- Big-box retailers cater to homeware, furniture and electronics needs effectively.
- Customers appreciate the straightforward, no-frills shopping experience.
- High loyalty and repeat visitation levels, with a net agreement of 43%

Opportunities for improvement

- Restrooms (85/100) and seating (86/100)
- Lack of variety in dining and entertainment leads to lower sentiment scores
- Digital engagement and promotional activity (88/100) underperform compared to traditional centres
- Potential to enhance play areas and family-friendly facilities

Outlet Centres

Outlet Centres excel in price-driven appeal, with the highest loyalty score of +47 NPS+, but need to improve overall fulfilment, as 27% of customers leave without finding everything they wanted.

Highest performing factors supporting satisfaction

- Strongest customer loyalty of all centre types, with high intention to return
- Value-driven proposition makes them a preferred choice for bargain hunters
- Well-maintained and designed spaces contribute to positive sentiment
- Service levels, particularly retailer engagement (91/100), score highly

Opportunities for improvement

- Fulfilment scores are the lowest among all centre types, with gaps in stock availability and product selection (27% net agreement).
- Restrooms (85/100) and seating (86/100) could be improved to enhance visitor comfort.
- Digital and wayfinding tools (88/100) could be strengthened to improve navigation.
- Need for a stronger balance between discounts and experiential offerings to encourage longer dwell times

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