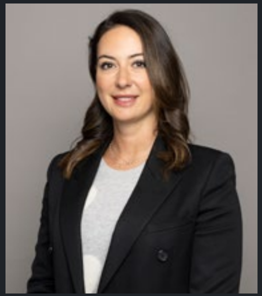

HOW WE SHOP
FROM PLAY TO PURPOSE
Image credit: Andrés Reisinger

FROM PLAY TO PURPOSE

EXAMINING A NEW WORLD OF EXPLORATIVE AND CONSUMER-CENTRIC RETAIL SOLUTIONS



I am delighted to introduce the **How We Shop: From Play to Purpose** report, an in-depth exploration of the consumer trends that are not only transforming the current retail and leisure landscape but also shaping the future of shopping experiences and redefining how brands engage with their audiences.

The retail sector and brand landscape is undergoing a significant transformation, driven by groundbreaking technologies such as AI, shifting consumer behaviours and an increasing demand for innovative experiences alongside sustainable choices. Understanding these changes is not merely advantageous; it is essential for staying ahead in an ever-evolving marketplace.

In this report, which reveals insights through the eyes of 2,000 UK consumers, we delve into the changing dynamics of shopping and leisure, examining the macro-trends that are defining the future of retail, hospitality and leisure. We cover a broad spectrum of topics, from how consumers shop, work and socialise, to the heightened focus on health and sustainability revealing three dominant trends—**Play-tail, Retail Surgery** and **EcoFluency**—which are at the forefront of the next wave of consumer and brand engagement.

Experiential retail is rapidly gaining momentum, with shopping destinations transforming into vibrant lifestyle hubs where dining, entertainment and social experiences now rival traditional shopping. At Westfield London and Westfield Stratford City, we're seeing significant growth in these areas. Global retailers are not only expanding their physical spaces but are also allocating more square footage to immersive in-store experiences. Simultaneously, brands are leveraging our retail media agency, Westfield Rise, to create innovative activations that enhance customer engagement.

Entertainment-led experiences are emerging as the new anchor attractions, replacing the traditional dominance of department stores. The demand for innovation and excitement is propelling the need for brand experiences that seamlessly integrate exploration, play and gamification, both in-store and online.

Health and wellbeing are priority areas, but surprisingly consumers are shunning traditional medical settings for more convenient and welcoming surroundings. Consumers are increasingly seeking personalised services that blend real-life interaction with the convenience of technology, all while prioritising safety and privacy. The brands that succeed will be those that master this delicate balance.

As expected, sustainability is no longer an optional consideration; it has become a significant factor in consumer decision-making. However, insight and transparency on sustainable practice is something that shoppers want more of from brands. Shoppers are more conscious than ever about environmental impact, and economic pressures are driving interest in pre-loved goods and brands that provide transparency and education. At Westfield destinations, we are collaborating closely with our retailers and brands to meet the growing consumer demand for sustainable practices, driving meaningful change across the retail landscape.

This report offers a comprehensive insight into the strategies shaping the future of retail, demonstrating our commitment to creating the very best customer experience through transforming our spaces, attracting the best brand experiences for our visitors and collaborating with all our partners to demonstrate positive change.

CANDICE MAYER-GILLET
Managing Director
Westfield Rise

TRENDS AT A GLANCE

PLAY-TAIL

Setting a new standard for the retail industry - from transaction to interaction, this movement encapsulates a new wave of multi-generational engagement, exploratory retail environments and the importance of gamifying the shopping experience.

RETAIL SURGERY

The quest for accessible, approachable and digitally enhanced medical wellbeing that breaks down conventional boundaries and barriers in a bid to normalise and democratise the pursuit of wellness and self care.

ECOFLUENCY

For a planet positive future, the need for accessible education and insights around green skills is imperative. Community based projects that merge cutting-edge technology with breeding positivity into the sustainable narrative around green skilling and circularity are key for future proofing the next generation.

> "It's all about content, experience and tapping into consumer values and culture. In turn, this will help foster 'communities of common interests' with brands at their core."

FOREWORD
By Ibrahim Ibrahim

Retail is in a state of metamorphosis. In future, consumers will engage with retailers and brands in completely new ways. Old systems and metrics are becoming increasingly redundant. We must move from sales per square metre to counting instead, surprises and shares per square metre. From traditional stores to immersive stages, from selling products to telling stories.

The cookie-cutter, one-size-fits-all approach to retail? It's a thing of the past. Audiences are tuning out, craving something more dynamic and exciting. Increasingly, physical retail won't just be about transactions and the distribution of goods. Like other aspects of our lives, it's becoming all about content, experience and tapping into consumer values and culture. In turn, this will help foster 'communities of common interests', with brands at their core.

To respond to future challenges, retail must embrace what I often refer to as the four pillars of 'Future Readiness':

Fast: It must be convenient, intuitive and devoid of complexity, responding to our increasingly hectic, stressful and precarious lives. Convenience is key.

Slow: It must deliver participatory and immersive experiences, with community, learning and entertainment at its heart.

Localised: Increasingly, consumers want to shop local. They're seeking authentic, unique products, services and experiences that are accessible and easy to get to.

Belonging: We are seeing a strong preference for brands with purpose and values at their heart. Where the focus is on what a brand stands for more than what it sells, and the ethos of building fandom is based on aligned values.

How We Shop: From Play to Purpose explores each of these pillars of through three key trends, influencing not only how consumers consume, but also how brands engage.

1. Brands embracing **Play-tail** know the importance of reinvention – shifting from what I call 'buy places' to 'join places' – focused on delivering ever-changing, compelling experiences curated by and for their communities.
2. Sustainable ambitions will leverage UK shoppers' values to make meaningful connections with brands through **EcoFluency**.
3. Shopping destinations that reinvent spaces to hero new categories will give locals new reasons to visit whilst attracting new audiences. **Retail Surgery** could very well see destinations like Westfield become Harley Street's biggest competitor!

And finally, in a world of tectonic shifts across the retail landscape, with change happening at warp speed, we are experiencing 'Retail Darwinism'. Consumer behaviours and expectations are evolving faster than brands can keep up. In this new era, it's not enough to merely respond – brands must predict and stay ahead to ensure survival and success.

Ibrahim Ibrahim

Retail expert, author, and Managing Director of Portland Design

OVERARCHING TRENDS

PLAY-TAIL

The future of retail is Play-tail. Savvy shoppers demand **greater interaction beyond transactions.** Spaces need to work harder to promote social connection and environments to spend time with friends and family.

RETAIL SURGERY

Our research demonstrates that **consumers want to be in the driver's seat when it comes to their health**, taking control over treatments with healthcare services that are more personalised to their needs and goals.

ECOFLUENCY

Concern around mounting environmental challenges, as well as cost of living pressures, continue to influence **consumer attitudes on consumption** requiring clear education to foster an eco-fluent future.

TREND 01

PLAY-TAIL

Across retail, entertainment venues and shared spaces, **consumers want to see amplified innovation, greater experience and interaction and over all, more excitement**. Almost half of UK consumers stated that the store experience has become boring.

This drives the appeal for innovative brand experiences that incorporate exploration, play and joy inside and outside stores including the gamification of leisure and retail settings.

AI tech in retail generates both excitement and concern, while some consumers look forward to smarter shopping and hyper-personalised advice, many fear job losses, less face-to-face interaction, and data misuse.

The future of retail hinges on **a reform of how we engage** and bring consumers along on a storytelling journey of purpose and engagement.

ENTERING A NEW WAVE OF PURPOSE & ENGAGEMENT

PLAY-TAIL

RETAIL AS AN ESCAPE

Shopping is so much more than a functional task. Think of retail as an explorative form of escapism, consumers are seeking new and awe inspiring experiences from physical to digital engagement.

96%

OF GEN Z WANT MORE FUN!

Younger shoppers seek more gamified and experiential spaces and activities in their free time

46%

of Brits look to shopping for a dose of escapism – it is no longer a functional activity.

47% OF UK CONSUMERS ARE CALLING FOR RETAILERS TO INNOVATE AND EXCITE.

Saying shops have become dull, the call for retailers to innovate and excite is clear.

33%

of under 35s are looking for more alcohol-free social spaces. As the trend for alcohol-free zones gains momentum, Gen Z is increasingly opting for spaces like adult playgrounds over traditional nightclubs.

43%

of Gen Z feel more excited about shopping when exposed to fun and innovative experiences hosted by brands.

OVER HALF

of Londoners often shop to escape the everyday or to experience something different.

PLAY-TAIL

DRIVING INNOVATIVE EXPERIENCES

MULTI-SENSORIAL PLAYSCAPES

GAMIFYING RETAIL

EDIBLE MERCH

62%

of Gen Zs and Millennials in London would spend more time with brands that incorporate play and games into the retail experience.

55%

of parents with kids aged 0-10 want more innovative playgrounds.

33%

of UK parents want more adult playgrounds and fun spaces for adults, like ball pits and mini golf.

MORE THAN 1 IN 3 GEN Z

prefer VR over traditional high streets in the UK.

46%

of Gen Z aged 18 and over are excited about AI-enhanced personalised, relevant recommendations and advertising.

47%

of Londoners are excited about 'smarter' shopping experiences enabled by AI technology, but just as many, 47%, fear wider adoption of AI will lead to job losses in retail.

FROM INNOVATIVE BLIND TASTE TESTING TO CAFE-IN-SHOP MERCH, MEMORABLE MOMENTS WITH FOOD ARE ON THE RISE.

52%

More than half of Londoners want to see more of F&B concepts and dining experiences that focus on fun and joy, e.g. through innovative flavours, dishes or unique design, rising to **62% of 25-34s in London.**

PLAY-TAIL

GEN Z SEEKS FUN, ALCOHOL-FREE SPACES

Gen Z are seeking access to alternative social spaces beyond home and work environments. The demand for fun and interactive settings such as adult playgrounds continues to rise, offering a fresh alternative to traditional entertainment and night-life venues.

36%

Of Gen Z 18+ want to see more playful leisure experiences for adults, such as ball pits and adventure playgrounds.

47%

of Londoners are excited about smart shopping.

49%

Of UK consumers are influenced by how brands present themselves in physical spaces/locations outside of their store when shopping.

FAMILIES REJOICE: MULTI-SENSORIAL PLAYSCAPES SET TO TRANSFORM HIGH STREETS.

52%

of parents in the UK want more fun and interactive places for family outings.

69%

Rising to 69% for those with kids aged 5-10.

1 IN 3

of under 35s in the UK want to have more access to fun spaces where they can socialise without alcohol.

36%	FEMALE GEN Z
40%	FEMALE MILLENIALS
41%	STUDENTS

40%

of UK Gen Zs and Millennials spend more time or money with brands that provide fun, innovative experiences.

"AT SOL DE JANEIRO, WE'VE SEEN FIRST-HAND THE IMPACT OF BRINGING OUR PRODUCTS DIRECTLY TO CONSUMERS THROUGH DYNAMIC, UNEXPECTED EXPERIENCES. BY GOING BEYOND TRADITIONAL RETAIL SETTINGS, THROUGH CREATIVE SAMPLING, ENGAGING GAMES, EXPERT CONSULTATIONS, OR EXCLUSIVE GIVEAWAYS, WE IMMERSE AUDIENCES INTO THE WARMTH, VIBRANT SPIRIT THAT SOL DE JANEIRO IS KNOWN FOR.

THE RISE OF 'PLAY-TAIL' HAS SET NEW STANDARDS FOR HOW CONSUMERS INTERACT WITH BEAUTY BRANDS, AND OUR RECENT ACTIVATIONS, LIKE THE 'UNLEASH YOUR SUMMER SELF' EVENT AT SEPHORA AND OUR SPACE NK WESTFIELD LONDON TAKEOVERS, DEMONSTRATES OUR ABILITY TO INNOVATE IN A WAY THAT FEELS AUTHENTIC."

Heela Yang

CEO & Co-Founder, Sol de Janeiro

TREND 02

RETAIL SURGERY

The desire for **easily accessible and convenient services** drives openness to non-traditional settings for health, wellness and aesthetic beauty services, such as wellness hubs in shopping centres and retail areas.

Digital wellbeing tools are used predominantly by younger generations, but **face-to-face interactions and services are still preferred by most UK consumers**, across generations, suggesting that environments that foster real-life interactions and provide tech-enabled convenience are likely to resonate with today's consumers.

NORMALISE & DEMOCRATISE THE PURSUIT OF SELF CARE

"THE GROWING DESIRE FOR ACCESSIBLE MEDICAL TREATMENTS HAS FUELLED DEMAND FOR VISION CARE IN MORE FAMILIAR RETAIL SPACES. BY INTEGRATING ADVANCED EYE CARE INTO SHOPPING CENTRES, WE'RE NORMALISING HEALTHCARE IN ENVIRONMENTS WHERE CONSUMERS ALREADY FEEL COMFORTABLE.

THE 'RETAIL SURGERY' TREND BRIDGES MEDICAL-GRADE CARE AND EVERYDAY ACCESSIBILITY, WITH 66% OF LONDONERS NOW PREFERRING HEALTHCARE IN RETAIL SPACES."

Rouven Mayer

Co-Founder & Co-CEO, Betterview

RETAIL SURGERY

FUTURE OF HEALTH & WELLNESS

Consumers aim to be in the driver's seat of their health services, signalling a need for more personalised care. Access to medical and aesthetic treatments on lunch breaks is on the rise. Dive into the future of wellness across our key findings.

68%

of UK adults want personalised healthcare. The majority of UK adults are now seeking more personalised, tailored healthcare services, signalling a major shift in consumer expectations.

71%

of UK Gen Z 18+ and Millennials say they want to be more in charge of their own health and treatments.

1 IN 4

UK adults turn to digital tools for wellbeing support as demand for tech-enabled care grows.

36%

of Brits would be happy to share their DNA for health reasons or to ensure they get a better product or service.

52%

of UK shoppers favour wellness hubs over GP clinics. Consumers are embracing the convenience of wellness hubs located in retail settings, with shopping centres emerging as popular alternatives to traditional clinics.

RETAIL WELLNESS HUBS ON THE RISE

66% of Londoners opt for non-emergency healthcare in retail settings including shopping centres.

"THE REPORT REVEALS THAT 68% OF CONSUMERS WANT PERSONALISED HEALTHCARE, AND PERSONALISATION HAS BEEN A KEY DRIVER IN THE DESIGN OF OUR NEWEST SPACE AT WESTFIELD LONDON. OUR HEALTHCARE SPACE WILL BE UNIQUE, COMPLETE WITH A RETAIL GALLERY, INTERACTIVE PHARMACY ZONES, AND A WELLNESS LOUNGE – BLENDING CUTTING-EDGE TECHNOLOGY WITH PERSONALISED CARE. BY COMBINING TREATMENTS, TOOLS, AND EXPERT GUIDANCE IN AN ENGAGING ENVIRONMENT, WE'RE REDEFINING THE HEALTHCARE EXPERIENCE TO MEET EVOLVING CONSUMER EXPECTATIONS."

Moustafa Tager

Pharmacy Manager at Prince Pharmacy

RETAIL SURGERY

ACCESSIBLE HEALTH CARE ON DEMAND

67%

Of shoppers are interested in access to health services such as dental, physiotherapy and other pain treatments within shopping centres.

61%

Of shoppers are interested in wellness services such as preventative health screeners (e.g. 'general health MOT'), stress management and therapies or counselling (e.g. talking therapies) pain treatments within shopping centres.

26%

Of UK adults are interested in heading to their nearest shopping centre for a non-surgical treatments

21%

Of female Millennials would get Botox if available at clinics located in shopping centres near them.

THE FUTURE OF FERTILITY: AUTOMATION OF ASSISTED REPRODUCTIVE TECHNOLOGY

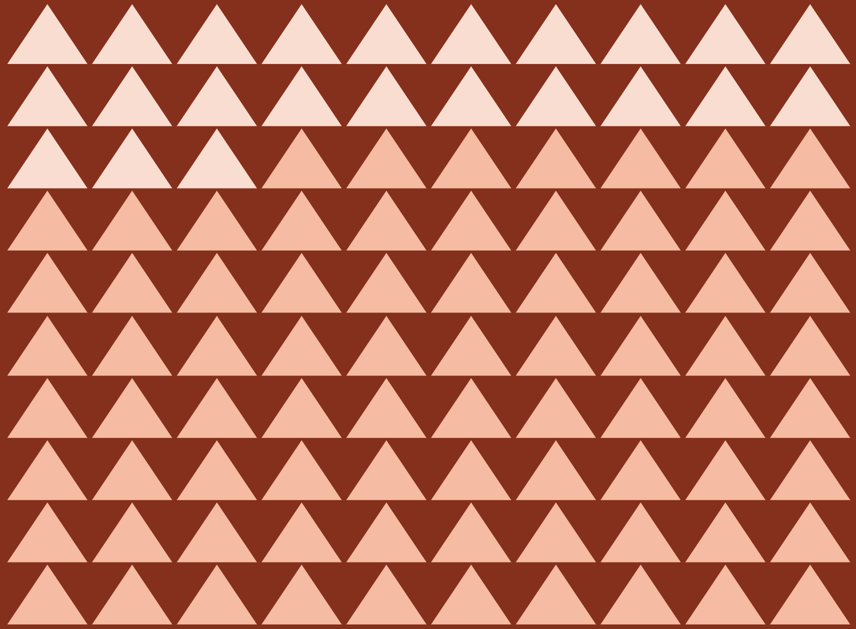
1 IN 5

Gen Z 18+ would get their fertility tested at clinics located in shopping centres.

RETAIL SURGERY

CONVENIENCE DRIVES HEALTHCARE IN RETAIL

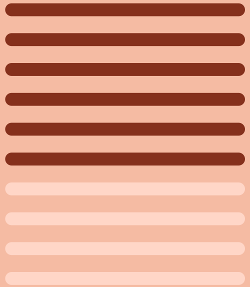
As half of UK shoppers prefer wellness hubs over GP clinics, retail spaces like shopping centres are set to become the go-to destinations for accessible health and wellness services.



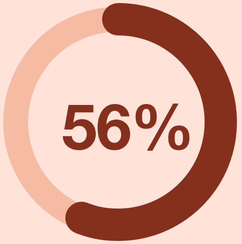
77%

Of UK adults prefer face-to-face services for mental wellbeing rather than digital or AI tools.

59%



of under 35s would visit a wellness hub over a clinic for aesthetic treatments.



Of under-35s in London are spending more on wellness services.

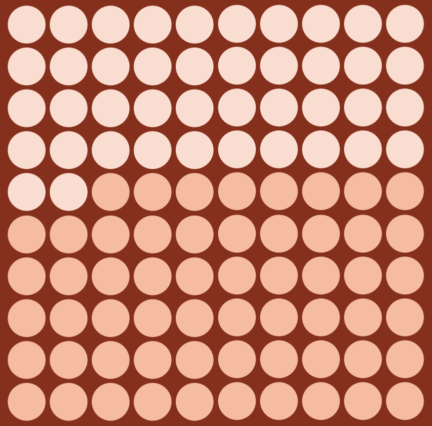
61%

Of UK consumers think convenience* is the main benefit of accessing health and wellness services in retail settings.

62% EXPERIENCE AND EXPERTISE ARE AS IMPORTANT AS CONVENIENCE

34% THINK RETAIL SETTINGS OFFER A MORE COMFORTABLE ENVIRONMENT THAN TRADITIONAL MEDICAL SETTINGS

20% EXPECT A BETTER EXPERIENCE THAN IN TRADITIONAL HEALTH CLINICS/HOSPITALS



58%

Of UK adults want non-emergency healthcare services available in retail settings like high streets and shopping centres.

71% OF MILLENNIALS ARE INTERESTED IN NON-SURGICAL AESTHETIC TREATMENTS IN SHOPPING CENTRES.

TREND 03

ECOFLUENCY

More than half of younger consumers are **open to diverting a significant proportion of their spend to pre-loved items** in the future and more pre-loved Retail offerings are a priority for many.

Providing **informative, easily accessible sustainability content and education** is also key as consumers still feel they have gaps in their knowledge when it comes to circularity (recycle,repair and reuse).

Consumers want brands to be more transparent about how their products are made by adopting **better technology or a universal sustainability grading system**.

CREATING A PLANET POSITIVE FUTURE

ECO-FLUENCY

SUSTAINABILITY SHIFTS PRIORITIES

Consumers are turning away from brands that lack eco-friendly options, with pre-loved fashion and repair services becoming increasingly popular. Building transparency and education will ensure future proofing the next generation.

65%

Of UK consumers want more reuse and repair options in the next five years. Consumers are increasingly prioritising sustainability, with a growing demand for repair and reuse services in retail.

77%

Of UK consumers are interested in using AI to make better choices. when shopping.

59%

Of UK consumers want brands to adopt a universal sustainability grading system.

64%

Of UK consumers are calling on brands to improve transparency in sourcing.

54%

of under 35s in London avoid brands that don't offer sustainable or environmentally friendly options.

SECOND-HAND FASHION SURGE

57% of Gen Z and Millennials are open to diverting the majority of their spend on clothing to pre-loved items to help the planet.

> NEARLY A DECADE AGO, WE SET OUT WITH A BOLD VISION: TO EMPOWER CONSUMERS TO SHAPE A MORE SUSTAINABLE FUTURE. SINCE THEN, OUR RATINGS HAVE GUIDED MILLIONS OF PEOPLE TO MAKE BETTER PURCHASING DECISIONS. WE KNOW THAT CONSUMERS INCREASINGLY WANT TO UNDERSTAND SUSTAINABILITY, AND THERE'S A GROWING NEED FOR A CONSISTENT, CREDIBLE SYSTEM FOR RETAILERS TO ENGAGE THEM ON THESE ISSUES.
>
> EARLIER THIS YEAR, WE PARTNERED WITH WESTFIELD TO DEVELOP THE SUSTAINABLE RETAIL INDEX (SRI) – THE FIRST INDUSTRY TOOL OF ITS KIND FOR THE COMMERCIAL REAL ESTATE SECTOR. IT EVALUATES BRANDS' SUSTAINABILITY COMMITMENTS, AMBITIONS, AND PERFORMANCE AT THE COMPANY, PRODUCT AND STORE LEVELS. THROUGH THIS WORK, WE AIM TO DRIVE GREATER TRANSPARENCY FOR CONSUMERS AND TO SUPPORT THE WHOLE RETAIL INDUSTRY TO DO BETTER, SO TOGETHER WE CAN HELP ACCELERATE THE SUSTAINABLE TRANSFORMATION WE SO URGENTLY NEED.

Sandra Capponi — Co-founder, Good on You

ECOFLUENCY

THE ECOFLUENCY REVOLUTION

FUTURE PROOFING

64%

Of UK consumers call on brands to adopt better technology to provide greater transparency about how their products and materials are sourced.

19%

Of UK consumers are interested in nature-inspired VR experiences during shopping trips

85%

Of Londoners are interested in AI tech/software which helps them to make more sustainable choices.

PRE-LOVED REVOLUTION

MORE THAN HALF

Of Gen Z and Millennials are open to diverting the majority of their clothing spend to pre-loved items to help the planet.

33%

Of women want to see more stores specialising in pre-loved, vintage or second-hand clothing.

GEN Z IS DRIVING A MAJOR SHIFT TOWARDS ECO-CONSCIOUS SHOPPING, FUELLING RAPID GROWTH IN THE SECOND-HAND FASHION MARKET.

FOCUS ON EDUCATION

1 IN 4

UK consumers would like to see more sustainability education and training from brands and retailers in the next 5 years.

This is **significantly higher in London, where nearly a third (31%)** are interested.

48%

Of UK consumers would spend more on brands that help them better understand sustainability.

38%

UK consumers admit they don't know a lot about reusing and re-purposing products.

ECOFLUENCY

AI IN RETAIL - EXCITEMENT MEETS CONCERN

The majority of Londoners are interested in AI-enabled shopping to help them make more sustainable choices, tailored advice and seamless transactions will become industry standard.

53% OF LONDONERS AGED 18–24 PREFER TO BUY ORGANIC OR ECO-FRIENDLY PERSONAL CARE AND BEAUTY PRODUCTS.

77% Of UK consumers are interested in using AI to make better, more sustainable shopping decisions.

40% Of Gen Z 18+ would like AI to give them tailored advice on how to find the most sustainable or environmentally friendly options when shopping.

66% Of Gen Z and Millennials are interested in sustainability.

61% Of UK women want to see more pre-loved shopping options in the next five years.

40% Of consumers are calling on shops and products to be packaging free

- **45%** DRIVEN BY BOOMERS
- **38%** WANT MORE OPTIONS TO REPAIR OR REFILL PRODUCTS
- **31%** WANT HIGH STREET BRANDS TO OFFER PRE-LOVED ALONGSIDE THEIR NEW COLLECTIONS

REPAIR OR REFILL

45% of Boomers want more options to repair or refill products.

RESEARCH METHODOLOGY

Trend forecasting & consultancy

Macro-trends shaping retail, leisure and hospitality provided by TrendBible, in collaboration with URW, The Academy and Headland.

Quantitative consumer research

Consistent with previous StudioAAPT research studies for “How We Shop”, the consumer research was conducted via a 10-minute online survey that included questions about current and expected future behaviours.

Survey sample

Nationally representative UK sample of 2,000 respondents aged 14+ as the base. Additional London boost sample of 1,000 respondents aged 14+ for further analysis. In total, 3,000 consumers. Questions related to the Retail Surgery trend only asked to those aged 18 and above. UK stats come from the nationally representative sample of 2,000. London stats come from the additional 1,000 boost sample.

Westfield

RISE

Your Vision, Our Stage

westfieldrise.com in