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Report —— August 2026

The 2026 Retail Consumer in 5 Charts

Five charts reveal how consumers are engaging with retail in 2026 – and what retailers, CRE professionals, and advertisers can learn from their behavior.

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Key Takeaways

1. Retail trips are often short and focused, making convenience and a frictionless shopping experience especially important while giving brands a limited window to capture shoppers' attention in-store.

2. Retail is highly local, with nearly 60% of visits originating within five miles – making the consumers who live near a store central to site selection, marketing, and tenant fit.

3. Despite the attention on Gen Z's embrace of physical retail, older shoppers remain a core brick-and-mortar audience that retailers, advertisers, and property professionals shouldn't overlook.
4. Brick-and-mortar attracts a distinct income mix, giving brands an opportunity to tailor their in-store strategies to existing shoppers while finding new ways to reach affluent consumers who currently underindex.
5. Value is a powerful traffic driver, but consumers are also showing up for discovery and experience – suggesting that the strongest reasons to shop in person can be practical, experiential, or both.

Understanding Today's Retail Consumer

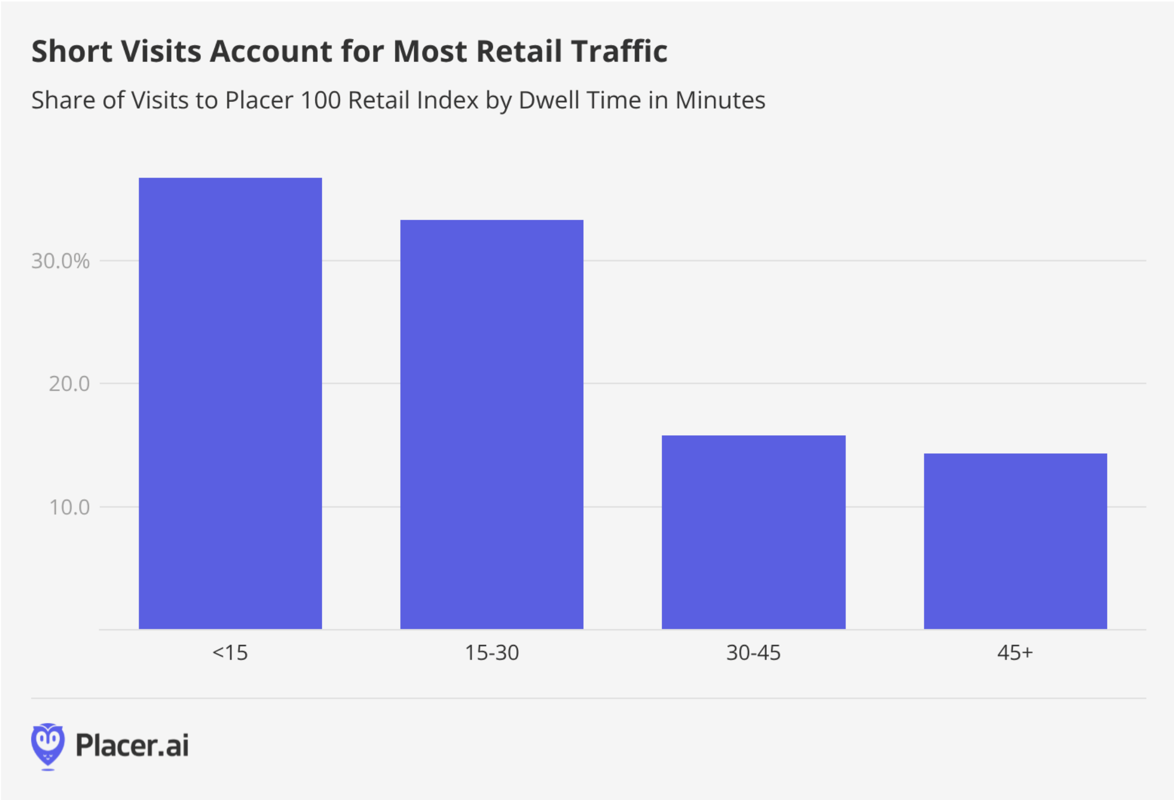
While much of the retail conversation centers on trends – from Gen Z's enthusiasm for brick-and-mortar to the growing importance of experiential retail – visitation data offers a window into how consumers are actually engaging with physical stores.

So what does the retail consumer look like in 2026? An analysis of the Placer 100 Retail Index reveals a shopper whose trips are often short and close to home, while highlighting meaningful differences in who visits physical stores across age and income groups. And a look at the retailers gaining the most traffic provides clues about what is resonating with consumers today, from compelling value to engaging in-store experiences.

The five charts that follow explore these behaviors and what they mean for retailers, advertisers, and CRE professionals looking to connect with today's brick-and-mortar consumer.

1. Short Visits Account for Most Retail Traffic

Retail visits tend to be brief, with the vast majority of visits to the Placer 100 Retail Index lasting less than 30 minutes and visits under 15 minutes representing the largest dwell-time bucket. The distribution suggests that many brick-and-mortar trips are relatively focused – making convenience and the ability to complete a shopping mission efficiently important considerations for retailers and shopping centers.



Why It Matters

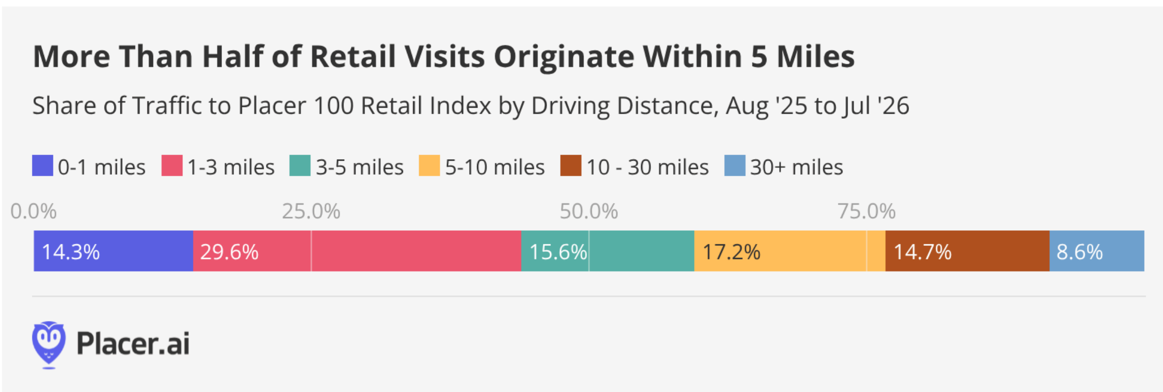
- **Retailers**: Reduce friction for mission-driven shoppers through intuitive layouts, easy product discovery, efficient checkout, and convenient pickup options.

- **Advertisers:** As more product discovery happens before the store visit, in-store advertising has an opportunity to do what digital channels can't by offering tactile experiences such as samples and product trials.

- **CRE Professionals**: Consider how tenant mix, parking, wayfinding, and property design can make quick trips easy while creating optional reasons for shoppers to stay longer.

2. More Than Half of Retail Visits Originate Within 5 Miles

Brick-and-mortar retail is highly local. Nearly 60% of visits originate within five miles of the store, including about 44% from within three miles. This means that choosing a location also means choosing a customer base, since the households surrounding a store are likely to account for a substantial share of its visitors.



Why It Matters

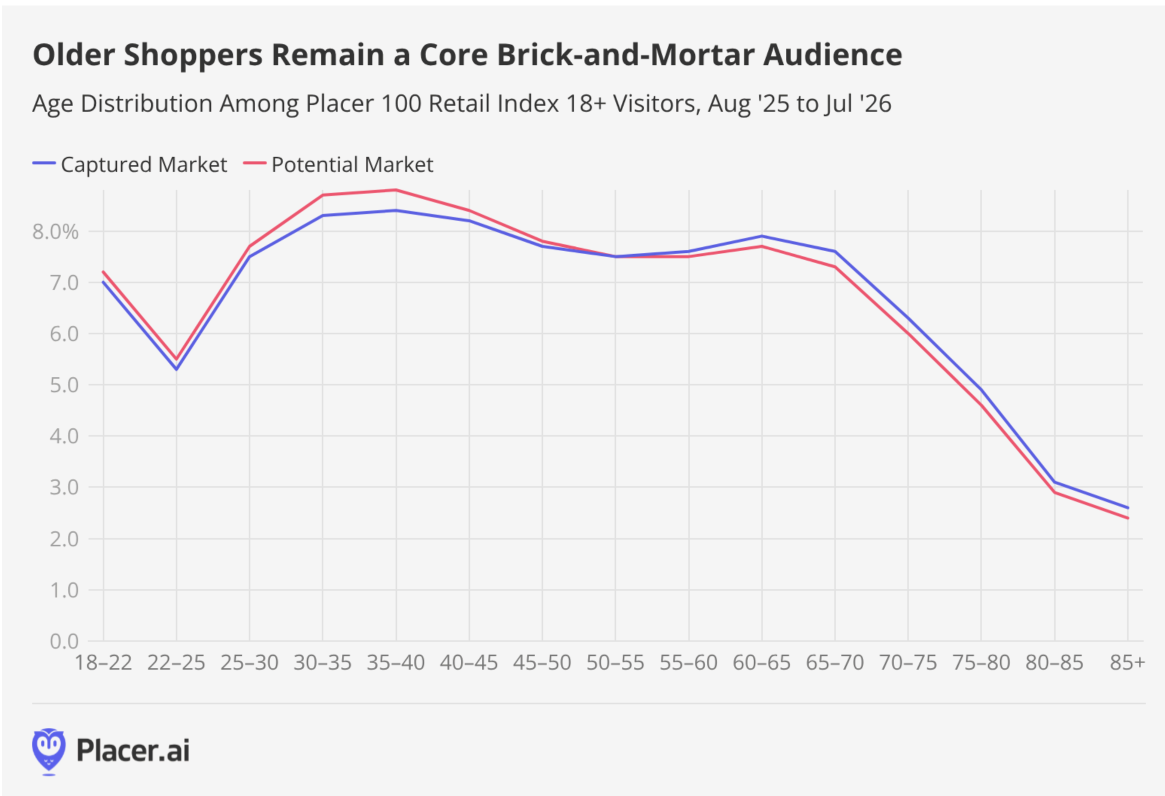
- **Retailers**: Evaluate prospective sites against the consumers a brand actually wants to reach – not just traffic, accessibility and nearby businesses.

- **Advertisers**: With so much retail traffic coming from nearby, localized campaigns can focus spending on the consumers most likely to visit a particular store.

- **CRE Professionals**: A strong location isn't equally strong for every tenant. Matching a property's surrounding population to a prospective tenant's customer profile can be as important as the site itself.

3. Older Shoppers Remain a Core Brick-and-Mortar Audience

Much of the conversation around brick-and-mortar retail has focused on Gen Z's embrace of in-person shopping. But older consumers remain an important part of the physical retail audience, with adults 55 and older generally overrepresented in the captured market of the chains making up the [Placer 100 Retail Index](). This suggests that brands looking to capitalize on renewed enthusiasm for offline shopping shouldn't overlook the generations that already have a strong affinity for it.



Why It Matters

- **Retailers**: The push to attract younger shoppers shouldn't come at the expense of older customers. Stores, merchandising, messaging, and experiences should serve the consumers already showing a strong propensity to visit in person.

- **Advertisers**: Don't let the attention surrounding Gen Z obscure an important offline audience. Older consumers' strong representation in stores makes them particularly relevant for campaigns designed to influence purchases at physical locations.

- **CRE Professionals**: Properties designed to appeal to the next generation of shoppers still need to work for today's older customers. Accessibility, ease of navigation, parking, seating, and a multigenerational tenant mix are all important considerations.

4. Brick & Mortar Retail Skews Toward Lower- and Middle-Income Consumers

Brick-and-mortar retail attracts a somewhat different income mix than the broader potential market. Households earning less than $100K are overrepresented among visitors to the Placer 100 Retail Index, while those earning more than $150K are underrepresented – highlighting opportunities at both ends of the income spectrum. Brands can tailor their in-store assortments, messaging, and promotions to better serve the consumers already visiting their stores while exploring strategies to attract more affluent shoppers who are already part of their broader potential market.

Why It Matters

- **Retailers**: A one-size-fits-all omnichannel strategy may leave opportunities on the table. Retailers can tailor their in-store offering to the consumers who already frequent physical locations while experimenting with ways to draw more high-income shoppers into stores.
- **Advertisers**: The audience for a store-based campaign may look different from a brand's overall audience. Campaigns intended to drive physical visits can account for the income profile of actual store visitors rather than relying solely on a brand's broader customer demographics.
- **CRE Professionals**: Use captured-market data to sharpen tenant selection. A prospective tenant's offline visitor profile can provide a more relevant measure

of fit than its overall brand audience – helping identify concepts whose in-store customers align with the consumers around a property.

5. Consumers Are Seeking Value and Experience

Consumers are rewarding retailers that give them a compelling reason to shop in person. Value-oriented retailers feature prominently among the Placer 100's fastest-growing chains, but retailers that combine value with discovery, browsing, or an experience that benefits from a physical store are also seeing strong gains. And for several leading brands – including Five Below, Hobby Lobby, Ross, and Citi Trends – growth is showing up not just across their footprints, but at the individual venue level as well.

Consumers Are Seeking Value and Experience

Placer 100 Top Gainers — Year-over-Year Visit Growth, Aug '25 to Jul '26

Top 10 on this metric (shade = growth)　Outside top 10

	Overall Visits	Average Visits per Venue
Five Below	17.1%	11.6%
Ollie's Bargain Outlet	17.0%	2.2%
Bass Pro Shops	16.5%	-0.4%
Hobby Lobby	16.0%	14.1%
Ross Dress for Less	15.1%	11.9%
Boot Barn	11.9%	1.6%
Citi Trends	11.8%	12.2%
Staples	11.8%	14.8%
Family Dollar	11.7%	1.6%
Barnes & Noble	11.5%	8.0%
Goodwill	10.6%	9.6%
T-Mobile	10.3%	6.3%
Michaels	6.6%	6.1%
Adidas	3.2%	6.5%

Purple = a top-10 finish on that metric; gray = grew but outside the top 10. Placer 100 Retail Index.

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Why It Matters

- **Retailers**: Value remains a powerful traffic driver, but it isn't the only way to win visits. Retailers can also draw shoppers by making the in-store experience worth the trip – through discovery, inspiration, selection, or experiences that are difficult to replicate online.

- **Advertisers**: Effective campaigns can highlight what makes an in-store visit worthwhile. For value-oriented brands, that might mean emphasizing deals and the thrill of discovery; for experiential retailers, it could mean showcasing the inspiration, selection, or experiences shoppers can only get in person.

- **CRE Professionals**: Consumers don't appear to be choosing between value or experience. Properties that offer both – and tenants that combine affordability with discovery or experiential appeal – may be especially well positioned to drive visits.

Understanding What Brings Consumers In

The five charts paint a clear picture of how consumers are engaging with brick-and-mortar retail in 2026. Visits are often short and close to home, older and lower- and middle-income consumers play an especially important role in physical retail, and the fastest-growing retailers show the continued appeal of both value and engaging in-store experiences. For retailers, advertisers, and CRE professionals, these patterns underscore the importance of aligning locations, experiences, and messaging with the consumers who actually visit – while identifying opportunities to reach those who don't.