

Appendix 6: Quantitative Leisure Capacity Assessment

Table 1: Population and Café/Restaurant Population and Expenditure Per Capita

Zone	Population					Per Capita Expenditure - <i>Café and Restaurant</i>					
	2024	2029	2034	2039	2040	2022	2024	2029	2034	2039	2040
1	84,113	85,392	86,453	87,462	87,706	564	555	583	611	635	641
2	14,288	14,542	14,694	14,753	14,742	795	782	822	861	896	903
3	77,752	78,570	79,235	79,962	80,071	644	634	666	697	726	731
4	45,256	45,646	46,020	46,425	46,530	695	684	719	752	783	789
5	42,084	42,464	42,994	43,524	43,610	569	560	588	616	641	646
6	25,573	25,956	26,347	26,747	26,831	518	510	536	561	584	588
7	25,564	26,028	26,475	26,831	26,907	704	693	728	762	793	800
8	20,033	20,175	20,266	20,431	20,478	738	726	763	799	831	838
9	65,709	66,103	66,489	66,880	66,974	792	779	819	857	892	899
10	34,989	36,040	36,874	37,585	37,721	911	896	942	986	1,026	1,035
11	57,047	58,234	59,180	59,755	59,860	965	950	998	1,045	1,087	1,096
12	84,250	86,179	87,882	89,458	89,793	740	728	765	801	834	840
13	12,100	12,456	12,750	13,050	13,094	830	817	858	899	935	943
Total	588,758	597,785	605,659	612,863	614,317						

- Notes:
- a. Zones based on the postcode sectors as set out in the main Study
 - b. Per capita expenditure derived from Experian MMG3 data (2024 report)
 - c. Population derived from Experian MMG3 data (2024 report).
 - e. Per capita expenditure projected forward using forecast growth rates taken from Figure 1a of Experian Retail Planner Briefing Note 21

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Table 2: Total Available Café and Restaurant Expenditure

Zone	Expenditure (£m)					Growth (£m)
	<i>Café and Restaurant</i>					2024-2040
	2024	2029	2034	2039	2040	
1	46.7	49.8	52.8	55.6	56.2	9.5
2	11.2	12.0	12.6	13.2	13.3	2.1
3	49.3	52.3	55.2	58.0	58.6	9.3
4	31.0	32.8	34.6	36.4	36.7	5.8
5	23.6	25.0	26.5	27.9	28.2	4.6
6	13.0	13.9	14.8	15.6	15.8	2.7
7	17.7	19.0	20.2	21.3	21.5	3.8
8	14.5	15.4	16.2	17.0	17.2	2.6
9	51.2	54.1	57.0	59.7	60.2	9.0
10	31.4	34.0	36.4	38.6	39.0	7.7
11	54.2	58.1	61.8	65.0	65.6	11.4
12	61.3	66.0	70.4	74.6	75.5	14.1
13	9.9	10.7	11.5	12.2	12.3	2.5
Total	414.9	443.0	470.0	495.0	500.1	85.2

- Notes:
- a. Zones based on the postcode sectors as set out in the main Study
 - b. Figures derived from multiplying per capita expenditure with population within each zone using data provided at Table 1

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Table 3: Cafe and Restaurant Patterns

	Total Cafe/Restaurant (%)	Zone 1 Cafe/Restaurant (%)	Zone 2 Cafe/Restaurant (%)	Zone 3 Cafe/Restaurant (%)	Zone 4 Cafe/Restaurant (%)	Zone 5 Cafe/Restaurant (%)	Zone 6 Cafe/Restaurant (%)	Zone 7 Cafe/Restaurant (%)	Zone 8 Cafe/Restaurant (%)	Zone 9 Cafe/Restaurant (%)	Zone 10 Cafe/Restaurant (%)	Zone 11 Cafe/Restaurant (%)	Zone 12 Cafe/Restaurant (%)	Zone 13 Cafe/Restaurant (%)
Study Area														
Zone 1														
Zone 1 - Stoke-on-Trent	22.4%	47.5%	0.0%	35.0%	31.3%	33.2%	31.3%	19.4%	15.2%	16.8%	0.0%	8.6%	8.8%	7.5%
Fenton Town Centre	0.1%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hanley Town Centre	19.0%	37.1%	0.0%	33.7%	24.8%	20.9%	31.3%	19.4%	15.2%	16.8%	0.0%	2.9%	7.9%	7.5%
Octagon Retail Park, Etruria Road, Stoke-on-Trent	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ravenside Retail Park, Victoria Road, Fenton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Shelton Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sneyd Green Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stoke-on-Trent Town Centre	4.6%	12.9%	0.0%	5.3%	10.2%	11.7%	2.0%	0.0%	0.0%	0.9%	0.0%	2.6%	2.1%	0.0%
Victoria Road Retail Park, Fenton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Century Retail Park, Etruria Road, Stoke-on-Trent	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Festival Heights Retail Park, Greyhound Way, Stoke-on-Trent	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Festival Retail Park, Ridge House Drive, Stoke-on-Trent	2.0%	1.1%	0.0%	4.4%	0.0%	10.8%	3.7%	1.4%	0.0%	2.1%	0.0%	0.0%	0.0%	1.4%
Intu Potteries Shopping Centre, City Centre (Hanley)	3.4%	10.4%	0.0%	1.3%	6.4%	12.4%	0.0%	0.0%	0.0%	0.0%	0.0%	5.7%	0.9%	0.0%
Zone 2 - Newcastle-under-Lyme														
Audley	0.2%	0.0%	4.7%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Betley Village Centre	0.5%	0.0%	15.2%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Bignall End	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Maskeley	0.7%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Onneley Local Centre	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wrinnehill Village Centre	0.1%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 - Staffordshire Moorlands														
Blithie Bridge Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Forsbrook Village Centre	0.2%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 - Stoke-on-Trent														
Adderley Green Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dresden District Centre														
Longton Town Centre	1.3%	2.7%	0.0%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
Meir Retail Park, Uttoxeter Road, Meir	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Phoenix Retail Park, Longton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Longton Exchange Shopping Centre, Longton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Longton Retail Park, Longton	0.2%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Meir Town Centre	0.5%	1.6%	0.0%	0.0%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4 - Newcastle-under-Lyme														
Etruria Way Retail Park, Stoke-on-Trent	0.6%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4 - Stoke-on-Trent														
Springfields Retail Park, Newcastle Road, Stoke-on-Trent	0.1%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
Trent Vale Village Centre	0.4%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%
Trentham Local Centre	1.4%	3.0%	8.0%	2.1%	4.6%	0.0%	0.0%	0.0%	0.0%	1.2%	2.5%	0.0%	0.0%	0.0%
Zone 5 - Staffordshire Moorlands														
Brown Edge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 - Stoke-on-Trent														
Burslem Town Centre	0.5%	0.0%	0.0%	0.0%	0.0%	4.5%	2.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
Mill Hill Village Centre	0.2%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Norton Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Smallthorne Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 - Stoke-on-Trent														
Sandyford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Silverstone Crescent (Packmoor)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tunstall Town Centre	1.3%	0.0%	0.0%	0.0%	4.7%	1.2%	21.8%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7 - Newcastle-under-Lyme														
Freeport Talke Outlet Mall, Pit Lane, Talke Pits	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harrishead Village Centre														
Kidsgrove Town Centre	0.6%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	10.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Talke Village Centre	0.5%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%
Zone 8 - Staffordshire Moorlands														
Biddulph Moor	0.5%	0.0%	0.0%	0.0%	0.0%	5.4%	1.4%	8.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Biddulph Town Centre	0.9%	0.0%	0.0%	0.0%	0.0%	4.8%	1.0%	14.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brown Lees	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gillow Heath Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 8 - Stoke-on-Trent														
Bradley Green Village Centre	0.1%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 9 - Staffordshire Moorlands														
Alton Village Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Ash Bank Village Centre	0.3%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Bagnall Village Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Chisley Town Centre	2.0%	0.0%	0.0%	2.1%	0.0%	5.4%	2.1%	11.4%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%
Cheddleton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dilhorn Local Centre	0.2%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dimmingsdale Local Centre	0.2%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Endon Village Centre	0.8%	6.0%	1.2%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Froggall Village Centre	0.1%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollington Village Centre														
Ipstones Village Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Leek Town Centre	1.0%	0.0%	0.0%	1.1%	0.0%	5.2%	0.0%	9.4%	4.1%	25.3%	0.0%	4.4%	1.2%	0.0%
Oakamoor Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Onecote Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stanley Local Centre	0.4%	1.1%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
Stanley Village Centre	0.4%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Stockton Brook Village Centre														
Team Village Centre	1.1%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Thorncliffe Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Upper Hulme Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Werrington Village Centre	0.3%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 10 - Stafford														
Barlaston	0.1%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eccleshall Town Centre														
Hilderstone Village Centre	0.2%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Oulton Village Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stone Town Centre	5.0%	2.5%	0.0%	10.5%	4.1%	0.0%	0.0%	1.3%	0.0%	2.1%	41.8%	0.0%	0.0%	3.2%
Swynnerton Village Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%	0.0%	0.0%
Zone 11 - Cheshire East														
Alsager Town Centre	2.5%	1.4%	2.0%	0.0%	0.0%	1.5%	1.4%	3.9%	0.0%	0.0%	0.0%	21.6%	0.0%	0.0%
Asbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Church Lawton Village Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Congleton Retail Park, Congleton														
Scholar Green Village Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%
Congleton Town Centre	6.0%	2.2%	5.6%	0.0%	0.0%	0.0%	1.7%	8.8%	30.1%	0.0%	0.0%	39.2%	1.2%	0.0%
Rode Heath	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%
Zone 12 - Newcastle-under-Lyme														
Baldwin's Gate	0.5%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	1.0%	0.0%	1.2%	3.7%
Blackbrook Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Chesterton	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Clayton	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%
Hill Chorlton Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0					

Notes:

a. Market shares derived from NEMS household survey

Table 5a: Estimated Capacity for Additional Café/Restaurant Floorspace in Authority Area

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2024	83.0	83.0	0.0	0.0
2029	83.6	88.6	0.0	5.0
2034	84.7	94.0	0.0	9.4
2039	85.5	99.0	0.0	13.5
2040	85.9	100.0	0.0	14.2
Study Area Market Share (%)		20.0		

Notes:
a. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure
b. Assumes constant market share claimed by Manchester facilities of 20.0% of Study Area expenditure

Table 5b: Gross Quantitative Capacity for Additional Café and Restaurant Floorspace in Authority Area

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq.m) Min
2024	0.0	0
2029	5.0	600
2034	9.4	1,100
2039	13.5	1,600
2040	14.2	1,700

Notes:
a. Average sales density assumed to be £8,584 per sq.m at 2023 as derived from Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure
b. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure

2022 Prices

Table 5a: Estimated Capacity for Additional Café/Restaurant Floorspace in Town Centre

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2024	57.8	57.8	0.0	0.0
2029	58.2	61.7	0.0	3.5
2034	58.9	65.5	0.0	6.5
2039	59.5	68.9	0.0	9.4
2040	59.8	69.6	0.0	9.9
Study Area Market Share (%)		13.9		

Notes:
a. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure
b. Assumes constant market share claimed by Manchester facilities of 13.9% of Study Area expenditure

Table 5b: Gross Quantitative Capacity for Additional Café and Restaurant Floorspace in Town Centre

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq.m) Min
2023	0.0	0
2028	3.5	400
2033	6.5	800
2038	9.4	1,100
2040	9.9	1,200

Notes:
a. Average sales density assumed to be £8,584 per sq.m at 2023 as derived from Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure
b. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure

2022 Prices

Table 6: Licensed Premises Population and Expenditure Per Capita

Zone	Population					2022	Per Capita Expenditure (£)				
	2024	2029	2034	2039	2040		2024	2028	2033	2038	2040
1	84,113	85,392	86,453	87,462	87,706	245	241	253	265	276	278
2	14,288	14,542	14,694	14,753	14,742	331	326	342	358	373	376
3	77,752	78,570	79,235	79,962	80,071	257	253	266	278	290	292
4	45,256	45,646	46,020	46,425	46,530	289	284	299	313	326	328
5	42,084	42,464	42,994	43,524	43,610	239	235	247	259	269	271
6	25,573	25,956	26,347	26,747	26,831	213	210	220	231	240	242
7	25,564	26,028	26,475	26,831	26,907	276	272	285	299	311	313
8	20,033	20,175	20,266	20,431	20,478	297	292	307	322	335	337
9	65,709	66,103	66,489	66,880	66,974	320	315	331	346	361	363
10	34,989	36,040	36,874	37,585	37,721	354	348	366	383	399	402
11	57,047	58,234	59,180	59,755	59,860	490	482	507	531	552	556
12	84,250	86,179	87,882	89,458	89,793	291	286	301	315	328	330
13	12,100	12,456	12,750	13,050	13,094	322	317	333	349	363	366
Total	588,758	597,785	605,659	612,863	614,317						

- Notes:
- a. Zones based on the postcode sectors as set out in the main Study
 - b. Per capita expenditure derived from Experian MMG3 data (2024 report)
 - c. Population derived from Experian MMG3 data (2024 report).
 - e. Per capita expenditure projected forward using forecast growth rates taken from Figure 1a of Experian Retail Planner Briefing Note 21

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Newcastle-under-Lyme Retail and Leisure Study Update
Nexus Planning

Table 7: Total Available Licensed Premises Expenditure

Zone		Expenditure (£m)				Growth (£m)
		Licensed Premises				
	2024	2029	2034	2039	2040	2024-2040
1	20.3	21.6	22.9	24.1	24.4	4.1
2	4.7	5.0	5.3	5.5	5.5	0.9
3	19.7	20.9	22.0	23.2	23.4	3.7
4	12.9	13.6	14.4	15.1	15.3	2.4
5	9.9	10.5	11.1	11.7	11.8	1.9
6	5.4	5.7	6.1	6.4	6.5	1.1
7	6.9	7.4	7.9	8.3	8.4	1.5
8	5.9	6.2	6.5	6.8	6.9	1.1
9	20.7	21.9	23.0	24.1	24.3	3.6
10	12.2	13.2	14.1	15.0	15.2	3.0
11	27.5	29.5	31.4	33.0	33.3	5.8
12	24.1	25.9	27.7	29.3	29.7	5.6
13	3.8	4.1	4.4	4.7	4.8	1.0
Total	173.9	185.7	197.0	207.4	209.5	35.7

- Notes:
- a. Zones based on the postcode sectors as set out in the main Study
 - b. Figures derived from multiplying per capita expenditure with population within each zone using data provided at Table 6

2022 Prices

Newcastle-under-Lyme Retail and Leisure Study Update
Nexus Planning

Table 9: Licensed Premises Patterns

Destination	Total Cafe/Restaurant (£m)	Zone 1 Cafe/Restaurant (£m)	Zone 2 Cafe/Restaurant (£m)	Zone 3 Cafe/Restaurant (£m)	Zone 4 Cafe/Restaurant (£m)	Zone 5 Cafe/Restaurant (£m)	Zone 6 Cafe/Restaurant (£m)	Zone 7 Cafe/Restaurant (£m)	Zone 8 Cafe/Restaurant (£m)	Zone 9 Cafe/Restaurant (£m)	Zone 10 Cafe/Restaurant (£m)	Zone 11 Cafe/Restaurant (£m)	Zone 12 Cafe/Restaurant (£m)
Study Area													
Zone 1													
Fenton Town Centre													
Hanley Town Centre	6.5	0.5	1.3	1.0	2.7	0.7	0.3	0.1	0.0	0.0	0.0	0.0	0.0
Octagon Retail Park, Etruria Road, Stoke-on-Trent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ravenside Retail Park, Victoria Road, Fenton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Shelton Local Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sneyd Green Local Centre	0.9	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stoke-on-Trent Town Centre	11.1	1.1	0.3	8.6	1.1	0.3	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Victoria Road Retail Park, Fenton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Century Retail Park, Etruria Road, Stoke-on-Trent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Festival Heights Retail Park, Greyhound Way, Stoke-on-Trent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Festival Retail Park, Ridge House Drive, Stoke-on-Trent	0.4	0.0	0.0	0.0	0.2	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0
Intu Potteries Shopping Centre, City Centre (Hanley)	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 2 - Newcastle-under-Lyme	1.6	0.0	0.0	0.0	0.9	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Audley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Betley Village Centre	3.0	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bignall End	1.5	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Signal End	0.9	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Madeley	1.7	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Onneley Local Centre	0.9	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wrinnehill Village Centre	1.4	0.8	0.0	0.4	0.8	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3 - Staffordshire Moorlands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Blythe Bridge Village Centre	0.2	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Forsbrook Village Centre	0.3	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3 - Stoke-on-Trent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Adderley Green Local Centre	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dresden District Centre	0.3	0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Longton Town Centre	0.6	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Meir Retail Park, Uttoxeter Road, Meir	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Phoenix Retail Park, Longton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Longton Exchange Shopping Centre, Longton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Longton Retail Park, Longton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Meir Town Centre	0.2	0.0	0.1	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0
Zone 4 - Newcastle-under-Lyme	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Etruria Way Retail Park, Stoke-on-Trent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 4 - Stoke-on-Trent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Springfields Retail Park, Newcastle Road, Stoke-on-Trent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Trent Vale Village Centre	0.8	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0
Trentnham Local Centre	4.8	3.1	0.3	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0
Zone 5 - Staffordshire Moorlands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Brown Edge	0.5	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 5 - Stoke-on-Trent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Burslem Town Centre	3.1	0.5	0.0	0.4	1.7	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Mill Hill Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Norton Local Centre	0.8	0.0	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Smallthorpe Local Centre	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 6 - Stoke-on-Trent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sandford	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Silverstone Crescent (Packmoor)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tunstall Town Centre	3.8	0.0	0.0	0.0	0.8	2.9	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Zone 7 - Newcastle-under-Lyme	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fresport Talke Outlet Mall, Pit Lane, Talke Pits	0.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Harriseshed Village Centre	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kidsgrove Town Centre	2.5	0.0	0.0	0.0	0.0	0.2	1.6	0.0	0.0	0.0	0.0	0.0	0.7
Talke Village Centre	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 8 - Staffordshire Moorlands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Biddulph Moor	0.9	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0
Biddulph Town Centre	2.7	0.0	0.0	0.0	0.0	0.5	2.1	0.0	0.0	0.0	0.0	0.0	0.0
Brown Lees	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gillow Heath Local Centre	0.2	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0
Zone 8 - Stoke-on-Trent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bradley Green Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 9 - Staffordshire Moorlands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Alton Village Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Ash Bank Village Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0
Bagnall Village Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Cheadle Town Centre	2.0	0.0	0.2	0.0	0.8	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0
Cheddleton	0.3	0.0	0.3	0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0
Dilhorn Local Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dimmingsdale Local Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Endon Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Froggall Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Hollington Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ipton Village Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0
Leek Town Centre	3.2	0.0	0.0	0.0	0.3	0.0	0.4	0.3	2.0	0.2	0.0	0.0	0.0
Oakmoor Village Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0
Onecote Village Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0
Stanley Local Centre	0.3	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Stanley Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stockton Brook Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Team Village Centre	0.6	0.0	0.2	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0
Thorndcliffe Village Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0
Upper Hulme Local Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0
Werrington Village Centre	0.4	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Zone 10 - Stafford	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Barlaston	0.9	0.0	0.0	0.5	0.3	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Eccleshall Town Centre	8.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.5	0.0	0.0	0.0	1.2
Hildersstone Village Centre	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Oulton Village Centre	0.3	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stone Town Centre	11.0	0.0	0.4	1.0	0.0	0.0	0.0	0.0	0.0	8.9	0.0	0.0	0.7
Swynerton Village Centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0
Zone 11 - Cheshire East	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Alsager Town Centre	4.8	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	4.6	0.0	0.0	0.0
Astbury	0.3	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0
Church Lawton Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Congleton Retail Park, Congleton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Scholar Green Village Centre	0.3	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.0
Congleton Town Centre	9.1	0.0	0.0	0.0	0.0	0.3	0.8	2.4	0.0	5.7	0.0	0.0	0.0
Rode Heath	0.3	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0
Zone 12 - Newcastle-under-Lyme	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Baldwin's Gate	0.8	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0
Blackbrook Local Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chesterston	0.8	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0
Clayton	1.5	0.0	0.0	0.0	0								

Table 10a: Estimated Capacity for Additional Licensed Premises Floorspace in Newcastle-under-Lyme Authority Area

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2024	63.6	63.6	0.0	0.0
2029	64.0	67.9	0.0	3.9
2034	64.9	72.1	0.0	7.2
2039	65.5	75.9	0.0	10.3
2040	65.8	76.6	0.0	10.9
Study Area Market Share (%)		36.6		

- Notes:
- a. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure
 - b. Assumes constant market share claimed by Manchester facilities of 36.6% of Study Area expenditure

Table 10b: Quantitative Capacity for Licensed Premises Floorspace in Newcastle-under-Lyme Authority Area

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq.m) Min
2024	0.0	0
2029	3.9	500
2034	7.2	900
2039	10.3	1,200
2040	10.9	1,300

- Notes:
- a. Average sales density assumed to be £8,512 per sq.m at 2023 as derived from Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure
 - b. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure

2022 Prices

Table 10a: Estimated Capacity for Additional Licensed Premises Floorspace in Town Centre

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2024	32.9	32.9	0.0	0.0
2029	33.2	35.2	0.0	2.0
2034	33.6	37.3	0.0	3.7
2039	33.9	39.3	0.0	5.4
2040	34.1	39.7	0.0	5.6
Study Area Market Share (%)		18.9		

- Notes:
- a. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure
 - b. Assumes constant market share claimed by Manchester facilities of 18.9% of Study Area expenditure

Table 10b: Quantitative Capacity for Licensed Premises Floorspace in Town Centre

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq.m) Min
2024	0.0	0.0
2029	2.0	200
2034	3.7	400
2039	5.4	600
2040	5.6	700

- Notes:
- a. Average sales density assumed to be £8,512 per sq.m at 2023 as derived from Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure
 - b. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure

2022 Prices

Appendix 7: Proposed Boundary Maps























































