

Nathaniel Lichfield & Partners Limited
Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 1: Population Growth

Sub Zone		Population					11-'16	11-'21	11-'26
		2001	2011	2016	2021	2026			
1	Newcastle East	80,795	83,113	84,172	85,365	86,888	1,060	2,252	3,775
2	Newcastle West	14,053	14,456	14,640	14,848	15,113	184	392	657
3	Kidsgrove	25,888	26,631	26,970	27,352	27,840	340	721	1,210
4	Stoke	19,374	19,455	19,793	20,164	20,518	338	709	1,064
5	Rural South	10,049	10,432	10,673	10,950	11,223	241	518	791
TOTAL		150,159	154,086	156,250	158,678	161,582	2,163	4,592	7,496
5a	Rural South	5,728	5,946	6,084	6,242	6,397	137	295	451
5b	Rural South	4,321	4,486	4,589	4,708	4,826	104	223	340

Notes:

2001 Census Population from Experian MMG3 (2011) - 2009 Prices

Population projected forward using ONS mid-year population estimates (2002 and 2008) and sub national (2008) population projections (published May 2010) for the Borough of Newcastle-under-Lyme, Stoke-on-Trent UA and Shropshire UA

2009 Prices Inclusive of VAT where applicable

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Table 2a: Convenience Retail Expenditure Growth by Zone

Sub Zone		Convenience Spending per Person (£)					11-'16	11-'21	11-'26
		2009	2011	2016	2021	2026			
1	Newcastle East	1,770	1,761	1,789	1,830	1,870	28	69	109
2	Newcastle West	1,950	1,939	1,970	2,015	2,060	31	76	121
3	Kidsgrove	1,853	1,843	1,872	1,915	1,957	29	72	114
4	Stoke	1,846	1,836	1,865	1,908	1,950	29	72	114
5	Rural South	1,945	1,934	1,965	2,010	2,054	31	76	120

Notes:

Experian local estimates for 2009 convenience goods expenditure per person (including retail business e-tailing but excluding other special forms of trading: 3.2% in 2009; 4.0% in 2011; 4.8% in 2016; 5.0% in 2021; and 5.3% in 2026.

Forecast annual growth rates of: 0.3% ('09-'10); 0.0% ('10-'11); 0.4% ('11-'12); and 0.5% ('12-'13 and annually thereafter)

2009 Prices Inclusive of VAT where applicable

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Table 2b: Comparison Retail Expenditure Growth by Zone

Sub Zone		Comparison Spending per Person (£)						11-'16	11-'21	11-'26
		2009	2011	2016	2021	2026				
1	Newcastle East	2,594	2,578	3,141	3,961	4,994	563	1,383	2,416	
2	Newcastle West	2,931	2,914	3,550	4,476	5,645	636	1,562	2,731	
3	Kidsgrove	2,661	2,645	3,223	4,064	5,124	578	1,419	2,479	
4	Stoke	2,801	2,784	3,392	4,277	5,393	608	1,493	2,609	
5	Rural South	3,161	3,142	3,828	4,827	6,086	686	1,685	2,944	

Notes:

Experian local estimates for 2009 comparison goods expenditure per person (including retail business e-tailing but excluding other special forms of trading: 7.5% in 2009; 9.5% in 2011; 10.4% in 2016; 10.2% in 2021; and 10.0% in 2026.

Forecast annual growth rates of: 0.4% ('09-'10); 1.2% ('10-'11); 2.4% ('11-'12); and 4.7% ('12-'13 and annually thereafter)

2009 Prices Inclusive of VAT where applicable

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Table 3a: Total Convenience Retail Expenditure and Growth

Sub Zone		Spending Power (£million)						11-'16	11-'21	11-'26
		2009	2011	2012	2016	2021	2026			
1	Newcastle East	143.0	146.4	147.0	150.6	156.2	162.5	4.2	9.9	16.1
2	Newcastle West	27.4	28.0	28.1	28.8	29.9	31.1	0.8	1.9	3.1
3	Kidsgrove	48.0	49.1	49.3	50.5	52.4	54.5	1.4	3.3	5.4
4	Stoke	35.8	35.7	35.9	36.9	38.5	40.0	1.2	2.8	4.3
5	Rural South	19.5	20.2	20.3	21.0	22.0	23.1	0.8	1.8	2.9
TOTAL		273.7	279.4	280.6	287.8	299.0	311.2	8.4	19.6	31.8
5a	Rural South	11.1	11.5	11.6	12.0	12.5	13.1	0.5	1.0	1.6
5b	Rural South	8.4	8.7	8.7	9.0	9.5	9.9	0.3	0.8	1.2
TOTAL		19.5	20.2	20.3	21.0	22.0	23.1	0.8	1.8	2.9

Notes:

Experian local estimates for 2009 convenience goods expenditure per person (including retail business e-tailing but excluding other special forms of trading: 3.2% in 2009; 4.0% in 2011; 4.8% in 2016; 5.0% in 2021; and 5.3% in 2026.

Forecast annual growth rates of: 0.3% ('09-'10); 0.0% ('10-'11); 0.4% ('11-'12); and 0.5% ('12-'13 and annually thereafter)

2009 Prices Inclusive of VAT where applicable

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Table 3b: Total Comparison Retail Expenditure and Growth

Sub Zone		Spending Power (£million)					11-'16	11-'21	11-'26
		2009	2011	2016	2021	2026			
1	Newcastle East	209.6	214.3	264.4	338.1	433.9	50.1	123.9	219.7
2	Newcastle West	41.2	42.1	52.0	66.5	85.3	9.8	24.3	43.2
3	Kidsgrove	68.9	70.4	86.9	111.2	142.7	16.5	40.7	72.2
4	Stoke	54.3	54.2	67.1	86.2	110.7	13.0	32.1	56.5
5	Rural South	31.8	32.8	40.9	52.9	68.3	8.1	20.1	35.5
TOTAL		405.7	413.8	511.3	654.8	840.8	97.5	241.1	427.1
5a	<i>Rural South</i>	18.1	18.7	23.3	30.1	38.9	4.6	11.4	20.3
5b	<i>Rural South</i>	13.7	14.1	17.6	22.7	29.4	3.5	8.6	15.3
TOTAL		31.8	32.8	40.9	52.9	68.3	8.1	20.1	35.5

Notes:

Experian local estimates for 2009 comparison goods expenditure per person (including retail business e-tailing but excluding other special forms of trading: 7.5% in 2009; 9.5% in 2011; 10.4% in 2016; 10.2% in 2021; and 10.0% in 2026.

Forecast annual growth rates of: 0.4% ('09-'10); 1.2% ('10-'11); 2.4% ('11-'12); and 4.7% ('12-'13 and annually thereafter)

2009 Prices Inclusive of VAT where applicable

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Table 4: Main Food Shopping Patterns

Centre/Facilities	Market Share (%)					TOTAL	Zone 5a Rural South	Zone 5b Rural South
	Zone 1 Newcastle East	Zone 2 Newcastle West	Zone 3 Kingsgrove	Zone 4 Stoke	Zone 5 Rural South			
Newcastle-under-Lyme Borough								
Kingsgrove Town Centre	0.0	0.7	0.9	0.0	0.0	0.4	0.0	0.0
Newcastle-under-Lyme Town Centre								
Morrisons, Goose Street	14.7	8.7	0.0	6.9	3.0	6.5	7.0	0.0
Other stores	1.8	2.9	0.0	0.0	0.6	1.0	0.0	0.9
Newcastle-under-Lyme Town Centre Sub-Total	16.5	11.5	0.0	6.9	3.6	7.5	7.0	0.9
Kingsgrove Area Foodstores								
Aldi, Liverpool Road	0.7	2.9	11.8	0.0	0.0	3.2	0.0	0.0
Tesco, Liverpool Road	0.0	1.5	32.7	0.0	0.8	7.5	0.0	1.3
Other stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kingsgrove Area Sub-Total	0.7	4.4	44.5	0.0	0.8	10.7	0.0	1.3
Newcastle-under-Lyme Area Foodstores								
Morrisons, Lower Milehouse Lane	23.2	30.9	8.6	2.8	2.1	13.4	5.0	0.0
Sainsbury's, Liverpool Road	19.8	10.7	2.3	2.1	4.7	8.0	9.8	1.3
Other stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle-under-Lyme Area Sub-Total	43.0	41.6	10.9	4.9	6.7	21.4	14.8	1.3
Other Destinations in Newcastle-under Lyme Borough								
Asda, Wolstanton Retail Park	15.5	13.0	14.7	3.6	1.3	9.8	1.5	1.3
Other stores	3.2	4.3	1.2	0.0	1.3	1.9	3.3	0.0
Other Newcastle-under-Lyme Borough Sub-Total	18.7	17.3	15.8	3.6	2.6	11.7	4.8	1.3
Sub-Total	79.0	75.5	72.1	15.4	13.6	51.7	26.5	4.8
Outside of Newcastle-under-Lyme Borough								
Asda, Scotia Road, Tunstall	1.4	0.7	13.5	0.0	0.0	3.4	0.0	0.0
Morrisons, Festival Park, Stoke-on-Trent City Centre (Hanley)	0.7	0.7	4.0	3.7	0.8	2.0	1.8	0.0
Morrisons, Maer Lane, Market Drayton	0.0	0.7	0.0	0.0	47.1	9.3	42.8	50.5
Sainsbury's, Minton House, London Road, Stoke	1.3	3.6	0.7	20.3	0.0	5.0	0.0	0.0
Tesco Express, Amison Street, Longton	0.0	0.7	0.0	4.9	0.0	1.1	0.0	0.0
Tesco Extra, Bath Road, Longton	2.0	0.7	0.0	10.2	0.6	2.6	1.5	0.0
Tesco, Newcastle Road, Stoke	7.9	3.6	0.0	15.7	2.4	5.8	4.7	0.9
Other stores	7.7	13.6	9.7	29.8	35.7	19.2	22.8	43.8
Outside of Newcastle-under-Lyme Sub-Total	21.0	24.5	27.9	84.6	86.4	48.3	73.5	95.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

Source: NEMS Household Telephone Survey (June 2011) - Excludes Don't Know/Don't Do, Other and Internet/Mail Order responses

Weightings afforded to Primary Main Food Destination and Secondary Main Food Destinations are 5/7 Primary Destination and 2/7 Secondary Destination

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Table 5: Top-Up Shopping Patterns

Centre/Facilities	Market Share (%)					TOTAL	Zone 5a Rural South	Zone 5b Rural South
	Zone 1 Newcastle East	Zone 2 Newcastle West	Zone 3 Kidsgrove	Zone 4 Stoke	Zone 5 Rural South			
Newcastle-under-Lyme Borough								
Kidsgrove Town Centre	0.0	4.6	6.3	0.0	0.0	2.1	0.0	0.0
Newcastle-under-Lyme Town Centre								
Morrisons, Goose Street	7.2	4.6	0.0	0.0	0.0	2.3	0.0	0.0
Other stores	8.4	7.6	0.0	2.4	0.0	3.6	0.0	0.0
Newcastle-under-Lyme Town Centre Sub-Total	15.7	12.1	0.0	2.4	0.0	6.0	0.0	0.0
Kidsgrove Area Foodstores								
Aldi, Liverpool Road	0.0	0.0	7.5	0.0	0.0	1.6	0.0	0.0
Tesco, Liverpool Road	0.0	1.5	26.3	0.0	0.0	5.7	0.0	0.0
Other stores	2.4	0.0	32.5	0.0	0.0	7.3	0.0	0.0
Kidsgrove Area Sub-Total	2.4	1.5	66.3	0.0	0.0	14.5	0.0	0.0
Newcastle-under-Lyme Area Foodstores								
Morrisons, Lower Milehouse Lane	10.8	6.1	2.5	1.2	0.0	4.2	0.0	0.0
Sainsbury's, Liverpool Road	9.6	3.0	0.0	0.0	1.3	2.9	2.9	0.0
Other stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle-under-Lyme Area Sub-Total	20.5	9.1	2.5	1.2	1.3	7.0	2.9	0.0
Other Destinations in Newcastle-under Lyme Borough								
Asda, Wolstanton Retail Park	6.0	1.5	1.3	1.2	0.0	2.1	0.0	0.0
Other stores	36.1	43.9	10.0	0.0	29.3	23.1	57.1	5.0
Other Newcastle-under-Lyme Borough Sub-Total	42.2	45.5	11.3	1.2	29.3	25.1	57.1	5.0
Sub-Total	80.7	72.8	86.3	4.9	30.7	54.7	60.0	5.0
Outside of Newcastle-under-Lyme Borough								
Asda, Scotia Road, Tunstall	0.0	0.0	1.3	0.0	0.0	0.3	0.0	0.0
Morrisons, Festival Park, Stoke-on-Trent City Centre (Hanley)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Morrisons, Maer Lane, Market Drayton	0.0	3.0	0.0	0.0	21.3	4.7	14.3	27.5
Sainsbury's, Minton House, London Road, Stoke	0.0	1.5	1.3	14.6	0.0	3.6	0.0	0.0
Tesco Express, Amison Street, Longton	0.0	0.0	1.3	0.0	0.0	0.3	0.0	0.0
Tesco Extra, Bath Road, Longton	0.0	0.0	0.0	3.7	0.0	0.8	0.0	0.0
Tesco, Newcastle Road, Stoke	3.6	1.5	0.0	3.7	1.3	2.1	2.9	0.0
Other stores	15.7	21.2	10.0	73.2	46.7	33.7	22.9	67.5
Outside of Newcastle-under-Lyme Sub-Total	19.3	27.3	13.8	95.1	69.3	45.3	40.0	95.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

Source: NEMS Household Telephone Survey (June 2011) - Excludes Don't Know/Don't Do, Other and Internet/Mail Order responses

2009 Prices Inclusive of VAT where applicable

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Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 6: Convenience Shopping Patterns (Main Food and Top-Up Combined)

Centre/Facilities	Market Share (%)						Zone 5a Rural South	Zone 5b Rural South
	Zone 1 Newcastle East	Zone 2 Newcastle West	Zone 3 Kidsgrove	Zone 4 Stoke	Zone 5 Rural South	TOTAL		
Newcastle-under-Lyme Borough								
Kidsgrove Town Centre	0.0	1.3	1.7	0.0	0.0	0.6	0.0	0.0
Newcastle-under-Lyme Town Centre								
Morrisons, Goose Street	13.6	8.0	0.0	5.9	2.6	5.9	6.0	0.0
Other stores	2.8	3.6	0.0	0.4	0.5	1.4	0.0	0.7
Newcastle-under-Lyme Town Centre Sub-Total	16.4	11.6	0.0	6.3	3.0	7.3	6.0	0.7
Kidsgrove Area Foodstores								
Aldi, Liverpool Road	0.6	2.4	11.2	0.0	0.0	2.9	0.0	0.0
Tesco, Liverpool Road	0.0	1.5	31.8	0.0	0.7	7.2	0.0	1.1
Other stores	0.4	0.0	4.9	0.0	0.0	1.1	0.0	0.0
Kidsgrove Area Sub-Total	1.0	3.9	47.9	0.0	0.7	11.2	0.0	1.1
Newcastle-under-Lyme Area Foodstores								
Morrisons, Lower Milehouse Lane	21.4	27.2	7.7	2.6	1.7	12.1	4.3	0.0
Sainsbury's, Liverpool Road	18.3	9.6	2.0	1.8	4.1	7.2	8.7	1.1
Other stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle-under-Lyme Area Sub-Total	39.7	36.9	9.6	4.3	5.9	19.3	12.9	1.1
Other Destinations in Newcastle-under Lyme Borough								
Asda, Wolstanton Retail Park	14.1	11.2	12.6	3.2	1.1	8.6	1.3	1.1
Other stores	8.2	10.3	2.5	0.0	5.5	5.1	11.3	0.8
Other Newcastle-under-Lyme Borough Sub-Total	22.3	21.5	15.1	3.2	6.6	13.7	12.6	1.9
Sub-Total	79.3	75.1	74.2	13.8	16.2	52.1	31.5	4.9
Outside of Newcastle-under-Lyme Borough								
Asda, Scotia Road, Tunstall	1.2	0.6	11.6	0.0	0.0	3.0	0.0	0.0
Morrisons, Festival Park, Stoke-on-Trent City Centre (Hanley)	0.6	0.6	3.4	3.2	0.7	1.7	1.5	0.0
Morrisons, Maer Lane, Market Drayton	0.0	1.1	0.0	0.0	43.4	8.6	38.6	47.3
Sainsbury's, Minton House, London Road, Stoke	1.1	3.3	0.8	19.5	0.0	4.8	0.0	0.0
Tesco Express, Amison Street, Longton	0.0	0.6	0.2	4.2	0.0	0.9	0.0	0.0
Tesco Extra, Bath Road, Longton	1.7	0.6	0.0	9.2	0.5	2.3	1.3	0.0
Tesco, Newcastle Road, Stoke	7.3	3.3	0.0	14.0	2.2	5.3	4.4	0.7
Other stores	8.8	14.8	9.8	36.2	37.1	21.3	22.7	47.1
Outside of Newcastle-under-Lyme Sub-Total	20.7	24.9	25.8	86.2	83.8	47.9	68.5	95.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

Source: NEMS Household Telephone Survey (June 2011) - Excludes Don't Know/Don't Do, Other and Internet/Mail Order responses
Weightings afforded to Main Food (Primary and Secondary combined)/Top up Shopping Destinations are 70%/30%

2009 Prices Inclusive of VAT where applicable

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Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 7: Convenience Retail Turnover 2011

Centre/Facilities	Expenditure (£ Million)					STUDY AREA TOTAL	INFLOW	OVERALL TOTAL	Zone 5a Rural South	Zone 5b Rural South
	Zone 1 Newcastle East	Zone 2 Newcastle West	Zone 3 Kidsgrove	Zone 4 Stoke	Zone 5 Rural South					
Expenditure 2011	146.4	28.0	49.1	35.7	20.2	279.4			11.5	8.7
Newcastle-under-Lyme Borough										
Kidsgrove Town Centre	0.0	0.4	0.8	0.0	0.0	1.2	0.1	1.2	0.0	0.0
Newcastle-under-Lyme Town Centre										
Morrisons, Goose Street	19.9	2.2	0.0	2.1	0.5	24.8	6.2	31.0	0.7	0.0
Other stores	4.1	1.0	0.0	0.1	0.1	5.3	0.3	5.6	0.0	0.1
Newcastle-under-Lyme Town Centre Sub-Total	24.0	3.3	0.0	2.2	0.6	30.1	6.5	36.5	0.7	0.1
Kidsgrove Area Foodstores										
Aldi, Liverpool Road	0.9	0.7	5.5	0.0	0.0	7.1	0.8	7.9	0.0	0.0
Tesco, Liverpool Road	0.0	0.4	15.6	0.0	0.1	16.1	4.0	20.2	0.0	0.1
Other stores	0.5	0.0	2.4	0.0	0.0	2.9	0.2	3.1	0.0	0.0
Kidsgrove Area Sub-Total	1.4	1.1	23.5	0.0	0.1	26.1	5.0	31.1	0.0	0.1
Newcastle-under-Lyme Area Foodstores										
Morrisons, Lower Milehouse Lane	31.3	7.6	3.8	0.9	0.4	44.0	11.0	54.9	0.5	0.0
Sainsbury's, Liverpool Road	26.8	2.7	1.0	0.6	0.8	31.9	8.0	39.8	1.0	0.1
Other stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle-under-Lyme Area Sub-Total	58.0	10.3	4.7	1.6	1.2	75.8	19.0	94.8	1.5	0.1
Other Destinations in Newcastle-under Lyme Borough										
Asda, Wolstanton Retail Park	20.6	3.1	6.2	1.2	0.2	31.3	7.8	39.2	0.1	0.1
Other stores	12.0	2.9	1.2	0.0	1.1	17.2	1.9	19.1	1.3	0.1
Other Newcastle-under-Lyme Borough Sub-Total	32.6	6.0	7.4	1.2	1.3	48.5	9.7	58.2	1.4	0.2
Sub-Total	116.0	21.1	36.4	4.9	3.3	181.7	40.2	221.9	3.6	0.4
Outside of Newcastle-under-Lyme Borough										
Asda, Scotia Road, Tunstall	1.8	0.2	5.7	0.0	0.0	7.7			0.0	0.0
Morrisons, Festival Park, Stoke-on-Trent City Centre (Hanley)	0.9	0.2	1.7	1.1	0.1	4.0			0.2	0.0
Morrisons, Maer Lane, Market Drayton	0.0	0.3	0.0	0.0	8.8	9.1			4.4	4.1
Sainsbury's, Minton House, London Road, Stoke	1.6	0.9	0.4	6.9	0.0	9.8			0.0	0.0
Tesco Express, Amison Street, Longton	0.0	0.2	0.1	1.5	0.0	1.7			0.0	0.0
Tesco Extra, Bath Road, Longton	2.5	0.2	0.0	3.3	0.1	6.0			0.1	0.0
Tesco, Newcastle Road, Stoke	10.7	0.9	0.0	5.0	0.4	17.0			0.5	0.1
Other stores	12.9	4.2	4.8	12.9	7.5	42.3			2.6	4.1
Outside of Newcastle-under-Lyme Sub-Total	30.3	7.0	12.7	30.8	16.9	97.6			7.9	8.3
Total	146.4	28.0	49.1	35.7	20.2	279.4			11.5	8.7

Notes:

Source: Tables 3a, 6

Rounding errors may occur

Inflow is set at 5% of turnover for town centre floorspace and foodstores up to 500 sq. m (net convenience sales area), 10% for foodstores up to 1,000 sq. m (net) and 20% for foodstore up to 2,000 sq. m (net)

Zone 5 is split into two (Zones 5a and 5b). Zone 5a is the area within Newcastle-under-Lyme Borough and Zone 5b is the area outside of Newcastle-under-Lyme Borough. This allows for an assessment of expenditure retention in the Borough.

2009 Prices Inclusive of VAT where applicable

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Table 8: Convenience Retail Turnover 2016

Centre/Facilities	Expenditure (£ Million)					STUDY AREA TOTAL	INFLOW	TOTAL
	Zone 1 Newcastle East	Zone 2 Newcastle West	Zone 3 Kidsgrove	Zone 4 Stoke	Zone 5 Rural South			
Expenditure 2016	150.6	28.8	50.5	36.9	21.0	287.8		
Newcastle-under-Lyme Borough								
Kidsgrove Town Centre	0.0	0.4	0.8	0.0	0.0	1.2	0.1	1.3
Newcastle-under-Lyme Town Centre								
Morrisons, Goose Street	19.8	2.3	0.0	2.2	0.5	24.8	6.4	31.2
Other stores	4.0	1.0	0.0	0.1	0.1	5.3	0.3	5.6
Newcastle-under-Lyme Town Centre Sub-Total	23.8	3.3	0.0	2.3	0.6	30.1	6.7	36.7
Kidsgrove Area Foodstores								
Aldi, Liverpool Road	0.9	0.7	5.6	0.0	0.0	7.2	0.8	8.1
Tesco, Liverpool Road	0.0	0.4	16.0	0.0	0.1	16.5	4.2	20.7
Other stores	0.5	0.0	2.5	0.0	0.0	3.0	0.2	3.1
Kidsgrove Area Sub-Total	1.4	1.1	24.1	0.0	0.1	26.8	5.1	31.9
Newcastle-under-Lyme Area Foodstores								
Morrisons, Lower Milehouse Lane	31.1	7.7	3.9	1.0	0.4	44.0	11.3	55.3
Sainsbury's, Liverpool Road	31.6	3.2	1.1	0.7	1.0	37.7	8.2	45.9
Other stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle-under-Lyme Area Sub-Total	62.7	10.9	5.0	1.6	1.4	81.7	19.5	101.2
Other Destinations in Newcastle-under Lyme Borough								
Asda, Wolstanton Retail Park	20.5	3.2	6.3	1.2	0.2	31.5	8.1	39.6
Other stores	11.9	2.9	1.2	0.0	1.1	17.2	2.0	19.2
Other Newcastle-under-Lyme Borough Sub-Total	32.4	6.1	7.6	1.2	1.4	48.7	10.0	58.7
Sub-Total	120.4	21.8	37.5	5.1	3.5	188.4	41.4	229.8
Outside of Newcastle-under-Lyme Borough								
Asda, Scotia Road, Tunstall	1.8	0.2	5.9	0.0	0.0	7.8		
Morrisons, Festival Park, Stoke-on-Trent City Centre (Hanley)	0.9	0.2	1.7	1.2	0.1	4.1		
Morrisons, Maer Lane, Market Drayton	0.0	0.3	0.0	0.0	9.0	9.3		
Sainsbury's, Minton House, London Road, Stoke	1.5	0.9	0.4	7.2	0.0	10.0		
Tesco Express, Amison Street, Longton	0.0	0.2	0.1	1.5	0.0	1.8		
Tesco Extra, Bath Road, Longton	2.4	0.2	0.0	3.4	0.1	6.1		
Tesco, Newcastle Road, Stoke	10.6	0.9	0.0	5.1	0.5	17.1		
Other stores	12.9	4.2	4.9	13.3	7.7	43.1		
Outside of Newcastle-under-Lyme Sub-Total	30.2	7.1	13.0	31.7	17.5	99.4		
Total	150.6	28.9	50.5	36.9	21.0	287.8		

Notes:

Source: Tables 3a, 6

Rounding errors may occur

Assumes that Sainsbury's (Liverpool Road) trades at company average sales density at 2012, and turnover grows pro-rata to the growth in spending power thereafter

Redistribution of expenditure is on a pro-rata basis (commensurate reduction in the turnover of all other stores to account for uplift in the Sainsbury's Liverpool Road turnover)

Expenditure inflow is assessed to increase at the same rate as expenditure within the Study Area (Study Area-wide growth rate adopted)

2009 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 9: Convenience Retail Turnover 2021

Centre/Facilities	Expenditure (£ Million)					STUDY AREA TOTAL	INFLOW	TOTAL
	Zone 1 Newcastle East	Zone 2 Newcastle West	Zone 3 Kidsgrove	Zone 4 Stoke	Zone 5 Rural South			
Expenditure 2021	156.2	29.9	52.4	38.5	22.0	299.0		
Newcastle-under-Lyme Borough								
Kidsgrove Town Centre	0.0	0.4	0.9	0.0	0.0	1.3	0.1	1.3
Newcastle-under-Lyme Town Centre								
Morrisons, Goose Street	20.5	2.4	0.0	2.3	0.6	25.7	6.6	32.3
Other stores	4.2	1.1	0.0	0.1	0.1	5.5	0.3	5.8
Newcastle-under-Lyme Town Centre Sub-Total	24.7	3.4	0.0	2.4	0.7	31.2	6.9	38.1
Kidsgrove Area Foodstores								
Aldi, Liverpool Road	0.9	0.7	5.9	0.0	0.0	7.5	0.8	8.4
Tesco, Liverpool Road	0.0	0.4	16.6	0.0	0.1	17.2	4.3	21.5
Other stores	0.5	0.0	2.5	0.0	0.0	3.1	0.2	3.3
Kidsgrove Area Sub-Total	1.5	1.1	25.0	0.0	0.1	27.8	5.3	33.1
Newcastle-under-Lyme Area Foodstores								
Morrisons, Lower Milehouse Lane	32.3	8.0	4.0	1.0	0.4	45.7	11.8	57.4
Sainsbury's, Liverpool Road	32.8	3.3	1.2	0.7	1.1	39.1	8.5	47.6
Other stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle-under-Lyme Area Sub-Total	65.0	11.3	5.2	1.7	1.5	84.8	20.3	105.1
Other Destinations in Newcastle-under Lyme Borough								
Asda, Wolstanton Retail Park	21.3	3.3	6.6	1.2	0.2	32.7	8.4	41.1
Other stores	12.3	3.0	1.3	0.0	1.2	17.9	2.0	19.9
Other Newcastle-under-Lyme Borough Sub-Total	33.6	6.3	7.9	1.2	1.4	50.5	10.4	60.9
Sub-Total	124.9	22.6	38.9	5.4	3.7	195.5	43.0	238.5
Outside of Newcastle-under-Lyme Borough								
Asda, Scotia Road, Tunstall	1.9	0.2	6.1	0.0	0.0	8.1		
Morrisons, Festival Park, Stoke-on-Trent City Centre (Hanley)	0.9	0.2	1.8	1.2	0.1	4.3		
Morrisons, Maer Lane, Market Drayton	0.0	0.3	0.0	0.0	9.5	9.8		
Sainsbury's, Minton House, London Road, Stoke	1.6	1.0	0.4	7.5	0.0	10.4		
Tesco Express, Amison Street, Longton	0.0	0.2	0.1	1.6	0.0	1.9		
Tesco Extra, Bath Road, Longton	2.5	0.2	0.0	3.5	0.1	6.3		
Tesco, Newcastle Road, Stoke	11.0	1.0	0.0	5.4	0.5	17.8		
Other stores	13.4	4.4	5.1	13.9	8.1	44.8		
Outside of Newcastle-under-Lyme Sub-Total	31.3	7.3	13.5	33.1	18.3	103.5		
Total	156.2	29.9	52.4	38.4	22.0	299.0		

Notes:

Source: Table 3a and Table 6

Rounding errors may occur

Inflow - See Note attached to Table 8

2009 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 10: Convenience Retail Turnover 2026

Centre/Facilities	Expenditure (£ Million)					STUDY AREA TOTAL	INFLOW	TOTAL
	Zone 1 Newcastle East	Zone 2 Newcastle West	Zone 3 Kidsgrove	Zone 4 Stoke	Zone 5 Rural South			
Expenditure 2026	162.5	31.1	54.5	40.0	23.1	311.2		
Newcastle-under-Lyme Borough								
Kidsgrove Town Centre	0.0	0.4	0.9	0.0	0.0	1.3	0.1	1.4
Newcastle-under-Lyme Town Centre								
Morrisons, Goose Street	21.4	2.5	0.0	2.4	0.6	26.8	6.9	33.7
Other stores	4.4	1.1	0.0	0.1	0.1	5.7	0.3	6.0
Newcastle-under-Lyme Town Centre Sub-Total	25.7	3.6	0.0	2.5	0.7	32.5	7.2	39.7
Kidsgrove Area Foodstores								
Aldi, Liverpool Road	1.0	0.7	6.1	0.0	0.0	7.8	0.9	8.7
Tesco, Liverpool Road	0.0	0.4	17.3	0.0	0.1	17.9	4.5	22.3
Other stores	0.6	0.0	2.7	0.0	0.0	3.2	0.2	3.4
Kidsgrove Area Sub-Total	1.5	1.2	26.0	0.0	0.1	28.9	5.5	34.4
Newcastle-under-Lyme Area Foodstores								
Morrisons, Lower Milehouse Lane	33.6	8.3	4.2	1.0	0.4	47.5	12.2	59.8
Sainsbury's, Liverpool Road	34.1	3.5	1.2	0.7	1.1	40.7	8.9	49.5
Other stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle-under-Lyme Area Sub-Total	67.7	11.8	5.4	1.8	1.5	88.2	21.1	109.3
Other Destinations in Newcastle-under Lyme Borough								
Asda, Wolstanton Retail Park	22.2	3.4	6.9	1.3	0.3	34.0	8.7	42.7
Other stores	12.8	3.1	1.3	0.0	1.3	18.6	2.1	20.7
Other Newcastle-under-Lyme Borough Sub-Total	35.0	6.6	8.2	1.3	1.5	52.6	10.9	63.4
Sub-Total	129.9	23.5	40.5	5.6	3.9	203.4	44.8	248.2
Outside of Newcastle-under-Lyme Borough								
Asda, Scotia Road, Tunstall	1.9	0.2	6.3	0.0	0.0	8.5		
Morrisons, Festival Park, Stoke-on-Trent City Centre (Hanley)	1.0	0.2	1.8	1.3	0.1	4.4		
Morrisons, Maer Lane, Market Drayton	0.0	0.3	0.0	0.0	9.9	10.3		
Sainsbury's, Minton House, London Road, Stoke	1.7	1.0	0.4	7.8	0.0	10.9		
Tesco Express, Amison Street, Longton	0.0	0.2	0.1	1.7	0.0	1.9		
Tesco Extra, Bath Road, Longton	2.6	0.2	0.0	3.7	0.1	6.6		
Tesco, Newcastle Road, Stoke	11.4	1.0	0.0	5.6	0.5	18.5		
Other stores	13.9	4.5	5.3	14.5	8.5	46.7		
Outside of Newcastle-under-Lyme Sub-Total	32.6	7.6	14.0	34.4	19.2	107.8		
Total	162.5	31.2	54.5	40.0	23.1	311.2		

Notes:

Source: Table 3a and Table 6

Rounding errors may occur

Inflow - See note attached to Table 8

2009 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 11: Summary of Convenience Retail Performance 2011 to 2026

Centre	2011	2016	2021	2026
<i>Available Expenditure</i>				
Kidsgrove	32.4	33.2	34.4	35.8
Newcastle-under-Lyme	131.3	138.0	143.2	149.0
Other Newcastle-under-Lyme Borough	58.2	58.7	60.9	63.4
Sub-Total	221.9	229.8	238.5	248.2
<i>Benchmark Turnover</i>				
Kidsgrove	31.9	31.9	31.9	31.9
Newcastle-under-Lyme	125.5	125.5	125.5	125.5
Other Newcastle-under-Lyme Borough	49.2	49.2	49.2	49.2
Sub-Total	206.6	206.6	206.6	206.6
<i>Expenditure Deficit/Surplus</i>				
Kidsgrove	0.5	1.3	2.5	3.9
Newcastle-under-Lyme	5.8	12.5	17.7	23.5
Other Newcastle-under-Lyme Borough	9.0	9.5	11.7	14.2
Sub-Total	15.3	23.2	31.9	41.6

Notes:

Source: Tables 7, 8, 9, 10

Benchmark Turnover based upon national-multiple retailers' company average sales density and independent floorspace trading at the average sales densities listed at Average Sales Density*.

2009 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 12: Convenience Retail Capacity (sq.m) at 2011, 2016, 2021 and 2026

Centre	AT 2011			BY 2016			BY 2021			BY 2026		
	Expenditure Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expenditure Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expenditure Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expenditure Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m
Kidsgrove	0.5	9,900	47	1.3	9,900	127	2.5	9,900	253	3.9	9,900	393
Newcastle-under-Lyme	5.8	10,900	535	12.5	10,900	1,142	17.7	10,900	1,623	23.5	10,900	2,154
Other Borough	9.0	10,400	870	9.5	10,400	915	11.7	10,400	1,129	14.2	10,400	1,366
Sub-Total	15.3			23.2			31.9			41.6		

Notes:

Source: Table 11

Capacity is assessed using the current average sales density amongst existing convenience retailers in Newcastle-under-Lyme and Kidsgrove

For other Retail Floorspace, a sales density equivalent to the mid-point of the Kidsgrove and Newcastle-under-Lyme sales densities is adopted

2009 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 13: Comparison Shopping Patterns

Centre/Facilities	Market Share (%)					TOTAL	Zone 5a Rural South	Zone 5b Rural South
	Zone 1 Newcastle East	Zone 2 Newcastle West	Zone 3 Kingsgrove	Zone 4 Stoke	Zone 5 Rural South			
Newcastle-under-Lyme Borough								
Kingsgrove Town Centre	0.1	0.5	7.4	0.4	0.0	1.7	0.0	0.0
Newcastle-under-Lyme Town Centre	42.7	27.5	7.2	11.7	9.0	19.8	17.3	2.1
Other Destinations in Newcastle-under Lyme Borough								
Freeport Talke Outlet Mall	1.3	2.0	4.5	1.2	0.3	1.9	0.7	0.0
Wolstanton Retail Park	6.8	1.5	2.2	1.5	0.2	2.5	0.4	0.0
Other destinations	2.3	6.1	7.4	0.1	0.8	3.4	0.8	0.5
Other Newcastle-under-Lyme Borough Sub-Total	10.5	9.6	14.0	2.8	1.3	7.7	1.9	0.5
Newcastle-under-Lyme Borough Sub-Total	53.3	37.6	28.7	15.0	10.3	29.2	19.1	2.6
Outside of Newcastle-under-Lyme Borough								
Crewe Town Centre	0.1	11.7	2.4	0.4	0.6	3.0	0.4	0.8
Festival Retail Park & Festival Heights, Stoke-on-Trent	15.5	9.1	17.4	11.6	3.4	11.6	5.7	1.7
Longton Town Centre	0.6	0.4	0.3	8.3	0.3	2.0	0.3	0.3
Market Drayton Town Centre	0.0	0.0	0.0	0.0	37.3	7.3	35.1	39.1
Manchester City Centre	1.5	2.0	2.0	0.7	1.0	1.4	1.3	0.8
Ravenside Retail Park, Fenton	1.2	0.5	0.4	3.8	0.0	1.2	0.0	0.0
Shrewsbury Town Centre	0.0	1.2	0.0	0.6	10.2	2.3	5.2	14.2
Springfield Retail Park. Stoke-on-Trent	1.7	2.0	0.0	6.1	0.9	2.2	0.9	0.9
Stoke Town Centre	0.8	0.6	0.1	4.6	0.6	1.4	1.0	0.4
Stoke-on-Trent City Centre (Hanley)	16.9	19.1	27.7	27.7	4.9	19.4	8.4	2.0
Telford Town Centre	0.0	0.0	0.0	0.0	12.1	2.3	3.9	18.7
Tunstall Town Centre	0.8	1.2	9.7	0.0	0.0	2.4	0.0	0.0
Other destinations	7.6	14.6	11.2	21.0	18.4	14.4	18.8	18.4
Outside of Newcastle-under-Lyme Sub-Total	46.7	62.4	71.3	85.0	89.7	70.8	80.9	97.4
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

Source: NEMS Household Telephone Survey (June 2011) - Excludes Don't Know/Don't Do, Other and Internet/Mail Order responses

2009 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 14: Comparison Retail Turnover 2011

Centre/Facilities	Expenditure (£ million)					STUDY AREA TOTAL	INFLOW	TOTAL	Zone 5a Rural South	Zone 5b Rural South
	Zone 1 Newcastle East	Zone 2 Newcastle West	Zone 3 Kidsgrove	Zone 4 Stoke	Zone 5 Rural South					
Expenditure 2011	214.3	42.1	70.4	54.2	32.8	413.8			18.7	14.1
Newcastle-under-Lyme Borough										
Kidsgrove Town Centre	0.3	0.2	5.2	0.2	0.0	6.0	2.0	7.9	0.0	0.0
Newcastle-under-Lyme Town Centre	91.4	11.6	5.1	6.3	3.0	117.3	39.1	156.4	3.2	0.3
Sub-Total	91.6	11.8	10.3	6.6	3.0	123.3	41.1	164.4	3.2	0.3
Other Destinations in Newcastle-under Lyme Borough										
Freepport Talke Outlet Mall	2.8	0.8	3.2	0.7	0.1	7.6	43.0	50.6	0.1	0.0
Wolstanton Retail Park	14.6	0.6	1.5	0.8	0.1	17.6	5.9	23.5	0.1	0.0
Other destinations	5.0	2.6	5.2	0.1	0.3	13.2	4.4	17.5	0.2	0.1
Other Newcastle-under-Lyme Borough Sub-Total	22.5	4.0	9.9	1.5	0.4	38.4	53.3	91.7	0.4	0.1
Newcastle-under-Lyme Borough Sub-Total	114.1	15.8	20.2	8.1	3.4	161.7	94.4	256.0	3.6	0.4
Outside of Newcastle-under-Lyme Borough										
Crewe Town Centre	0.3	4.9	1.7	0.2	0.2	7.4			0.1	0.1
Festival Retail Park & Festival Heights, Stoke-on-Trent	33.2	3.8	12.2	6.3	1.1	56.7			1.1	0.2
Longton Town Centre	1.3	0.2	0.2	4.5	0.1	6.3			0.1	0.0
Market Drayton Town Centre	0.0	0.0	0.0	0.0	12.2	12.2			6.6	5.5
Manchester City Centre	3.2	0.8	1.4	0.4	0.3	6.1			0.2	0.1
Ravenside Retail Park, Fenton	2.5	0.2	0.3	2.1	0.0	5.1			0.0	0.0
Shrewsbury Town Centre	0.0	0.5	0.0	0.3	3.3	4.2			1.0	2.0
Springfield Retail Park, Stoke-on-Trent	3.7	0.9	0.0	3.3	0.3	8.2			0.2	0.1
Stoke Town Centre	1.7	0.2	0.1	2.5	0.2	4.8			0.2	0.1
Stoke-on-Trent City Centre (Hanley)	36.3	8.0	19.5	15.0	1.6	80.4			1.6	0.3
Telford Town Centre	0.0	0.0	0.0	0.0	3.9	3.9			0.7	2.6
Tunstall Town Centre	1.6	0.5	6.8	0.0	0.0	9.0			0.0	0.0
Other destinations	16.2	6.2	7.9	11.4	6.0	47.7			3.5	2.6
Outside of Newcastle-under-Lyme Sub-Total	100.1	26.3	50.2	46.1	29.4	252.1			15.1	13.7
Total	214.3	42.1	70.4	54.2	32.8	413.8			18.7	14.1

Notes:

Source: Tables 3b, 13

Rounding errors may occur

2009 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 15: Comparison Retail Turnover 2016

Centre/Facilities	Expenditure (£ million)					STUDY AREA TOTAL	INFLOW	TOTAL
	Zone 1 Newcastle East	Zone 2 Newcastle West	Zone 3 Kidsgrove	Zone 4 Stoke	Zone 5 Rural South			
Expenditure 2016	264.4	52.0	86.9	67.1	40.9	511.3		
Newcastle-under-Lyme Borough								
Kidsgrove Town Centre	0.3	0.3	6.5	0.3	0.0	7.4	2.5	9.8
Newcastle-under-Lyme Town Centre	112.8	14.3	6.3	7.8	3.7	144.9	48.3	193.2
Sub-Total	113.1	14.6	12.7	8.1	3.7	152.2	50.8	203.0
Other Destinations in Newcastle-under Lyme Borough								
Freeport Talke Outlet Mall	3.5	1.0	3.9	0.8	0.1	9.4	53.2	62.5
Wolstanton Retail Park	18.0	0.8	1.9	1.0	0.1	21.8	7.3	29.0
Other destinations	6.2	3.2	6.4	0.1	0.3	16.2	5.4	21.7
Other Newcastle-under-Lyme Borough Sub-Total	27.7	5.0	12.2	1.9	0.5	47.4	65.8	113.2
Newcastle-under-Lyme Borough Sub-Total	140.8	19.5	24.9	10.1	4.2	199.6	116.6	316.2
Outside of Newcastle-under-Lyme Borough								
Crewe Town Centre	0.4	6.1	2.1	0.3	0.3	9.1		
Festival Retail Park & Festival Heights, Stoke-on-Trent	41.0	4.7	15.1	7.8	1.4	70.0		
Longton Town Centre	1.6	0.2	0.2	5.6	0.1	7.7		
Market Drayton Town Centre	0.0	0.0	0.0	0.0	15.2	15.2		
Manchester City Centre	3.9	1.0	1.8	0.5	0.4	7.6		
Ravenside Retail Park, Fenton	3.1	0.2	0.4	2.6	0.0	6.3		
Shrewsbury Town Centre	0.0	0.6	0.0	0.4	4.2	5.2		
Springfield Retail Park, Stoke-on-Trent	4.6	1.1	0.0	4.1	0.4	10.2		
Stoke Town Centre	2.2	0.3	0.1	3.1	0.3	5.9		
Stoke-on-Trent City Centre (Hanley)	44.7	9.9	24.1	18.6	2.0	99.4		
Telford Town Centre	0.0	0.0	0.0	0.0	4.9	4.9		
Tunstall Town Centre	2.0	0.6	8.4	0.0	0.0	11.1		
Other destinations	20.0	7.6	9.7	14.1	7.5	59.0		
Outside of Newcastle-under-Lyme Sub-Total	123.6	32.4	62.0	57.1	36.7	311.7		
Total	264.4	52.0	86.9	67.1	40.9	511.3		

Notes:

Source: Tables 3b, 13

Rounding errors may occur

Expenditure inflow is assessed to increase at the same rate as expenditure within the Study Area (Study Area-wide growth rate adopted)

2009 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 16: Comparison Retail Turnover 2021

Centre/Facilities	Expenditure (£ million)					TOTAL	TOTAL	TOTAL
	Zone 1 Newcastle East	Zone 2 Newcastle West	Zone 3 Kidsgrove	Zone 4 Stoke	Zone 5 Rural South			
Expenditure 2021	338.1	66.5	111.2	86.2	52.9	654.8		
Newcastle-under-Lyme Borough								
Kidsgrove Town Centre	0.4	0.4	8.3	0.4	0.0	9.4	3.1	12.5
Newcastle-under-Lyme Town Centre	144.2	18.3	8.0	10.1	4.8	185.4	61.9	247.3
Sub-Total	144.6	18.6	16.3	10.5	4.8	194.8	65.0	259.8
Other Destinations in Newcastle-under Lyme Borough								
Freeport Talke Outlet Mall	4.5	1.3	5.0	1.1	0.2	12.0	68.1	80.1
Wolstanton Retail Park	23.1	1.0	2.4	1.3	0.1	27.8	9.3	37.1
Other destinations	7.9	4.1	8.2	0.1	0.4	20.8	6.9	27.7
Other Newcastle-under-Lyme Borough Sub-Total	35.5	6.4	15.6	2.5	0.7	60.6	84.3	144.9
Newcastle-under-Lyme Borough Sub-Total	180.1	25.0	31.9	12.9	5.4	255.3	149.4	404.7
Outside of Newcastle-under-Lyme Borough								
Crewe Town Centre	0.5	7.8	2.7	0.4	0.3	11.7		
Festival Retail Park & Festival Heights, Stoke-on-Trent	52.4	6.1	19.3	10.0	1.8	89.6		
Longton Town Centre	2.1	0.2	0.3	7.2	0.2	9.9		
Market Drayton Town Centre	0.0	0.0	0.0	0.0	19.7	19.7		
Manchester City Centre	5.0	1.3	2.2	0.6	0.5	9.7		
Ravenside Retail Park, Fenton	4.0	0.3	0.5	3.3	0.0	8.1		
Shrewsbury Town Centre	0.0	0.8	0.0	0.5	5.4	6.7		
Springfield Retail Park, Stoke-on-Trent	5.9	1.4	0.0	5.3	0.5	13.0		
Stoke Town Centre	2.8	0.4	0.1	4.0	0.3	7.6		
Stoke-on-Trent City Centre (Hanley)	57.2	12.7	30.8	23.9	2.6	127.2		
Telford Town Centre	0.0	0.0	0.0	0.0	6.4	6.4		
Tunstall Town Centre	2.6	0.8	10.8	0.0	0.0	14.2		
Other destinations	25.6	9.7	12.5	18.1	9.7	75.7		
Outside of Newcastle-under-Lyme Sub-Total	158.0	41.5	79.3	73.3	47.4	399.5		
Total	338.1	66.4	111.2	86.2	52.9	654.8		

Notes:

Source: Tables 3b, 13

Rounding errors may occur

Inflow - See note attached to Table 15

2009 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 17: Comparison Retail Turnover 2026

Centre/Facilities	Expenditure (£ million)					STUDY AREA TOTAL	INFLOW	TOTAL
	Zone 1 Newcastle East	Zone 2 Newcastle West	Zone 3 Kidsgrove	Zone 4 Stoke	Zone 5 Rural South			
Expenditure 2026	433.9	85.3	142.7	110.7	68.3	840.8		
Newcastle-under-Lyme Borough								
Kidsgrove Town Centre	0.5	0.5	10.6	0.5	0.0	12.1	4.0	16.1
Newcastle-under-Lyme Town Centre	185.1	23.4	10.3	12.9	6.2	237.9	79.5	317.4
Sub-Total	185.6	23.9	20.9	13.4	6.2	250.0	83.5	333.5
Other Destinations in Newcastle-under Lyme Borough								
Freeport Talke Outlet Mall	5.7	1.7	6.4	1.4	0.2	15.4	87.4	102.8
Wolstanton Retail Park	29.6	1.3	3.1	1.7	0.1	35.7	11.9	47.6
Other destinations	10.2	5.2	10.6	0.1	0.5	26.7	8.9	35.6
Other Newcastle-under-Lyme Borough Sub-Total	45.5	8.2	20.0	3.1	0.9	77.8	108.3	186.1
Newcastle-under-Lyme Borough Sub-Total	231.1	32.1	40.9	16.6	7.0	327.7	191.8	519.5
Outside of Newcastle-under-Lyme Borough								
Crewe Town Centre	0.6	10.0	3.5	0.5	0.4	15.0		
Festival Retail Park & Festival Heights, Stoke-on-Trent	67.2	7.8	24.8	12.8	2.4	115.0		
Longton Town Centre	2.7	0.3	0.4	9.2	0.2	12.7		
Market Drayton Town Centre	0.0	0.0	0.0	0.0	25.5	25.5		
Manchester City Centre	6.4	1.7	2.9	0.8	0.7	12.5		
Ravenside Retail Park, Fenton	5.2	0.4	0.6	4.2	0.0	10.4		
Shrewsbury Town Centre	0.0	1.1	0.0	0.7	7.0	8.7		
Springfield Retail Park, Stoke-on-Trent	7.6	1.7	0.0	6.8	0.6	16.7		
Stoke Town Centre	3.5	0.5	0.2	5.1	0.4	9.7		
Stoke-on-Trent City Centre (Hanley)	73.4	16.3	39.5	30.7	3.4	163.3		
Telford Town Centre	0.0	0.0	0.0	0.0	8.2	8.2		
Tunstall Town Centre	3.3	1.0	13.9	0.0	0.0	18.2		
Other destinations	32.9	12.5	16.0	23.3	12.5	97.2		
Outside of Newcastle-under-Lyme Sub-Total	202.8	53.2	101.7	94.1	61.3	513.1		
Total	433.9	85.3	142.7	110.7	68.3	840.8		

Notes:

Source: Tables 3b, 13

Rounding errors may occur

Inflow - See note attached to Table 15

2009 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 18: Summary of Comparison Retail Performance 2011 to 2026

Centre	2011	2016	2021	2026
Available Expenditure				
Kidsgrove	7.9	9.8	12.5	16.1
Newcastle-under-Lyme	156.4	193.2	247.3	317.4
Freeport	50.6	62.5	80.1	102.8
Wolstanton	23.5	29.0	37.1	47.6
Other Destinations in the Borough	17.5	21.7	27.7	35.6
Other Newcastle-under-Lyme Borough	91.7	113.2	144.9	186.1
Sub-Total	256.0	316.2	404.7	519.5
Expected Turnover				
Kidsgrove	6.6	7.3	8.0	8.9
Newcastle-under-Lyme	138.9	153.4	169.3	186.9
Freeport	64.8	71.5	79.0	87.2
Wolstanton	25.8	28.5	31.5	34.7
Other Destinations in the Borough	17.5	19.4	21.4	23.6
Other Newcastle-under-Lyme Borough	90.7	100.1	110.6	122.1
Sub-Total	236.2	260.8	287.9	317.9
Expenditure Deficit/Surplus				
Kidsgrove	1.3	2.5	4.5	7.2
Newcastle-under-Lyme	17.5	39.8	77.9	130.4
Freeport	-14.2	-9.0	1.1	15.6
Wolstanton	-2.3	0.5	5.7	12.9
Other Destinations in the Borough	0.0	2.3	6.3	12.0
Other Newcastle-under-Lyme Borough	-7.3	-0.3	12.4	30.4
Sub-Total	11.6	42.0	94.8	168.0

Notes:

Source: Tables 14, 15, 16, 17

Benchmark turnover based upon NLP assumptions

Assumes that other destinations in Newcastle-under-Lyme Borough are trading at Benchmark levels

Household Survey suggests that approximately 15% of Freeport turnover derives from Newcastle-under-Lyme Borough. In-flow to other comparison retail destinations in the Borough is approximately 20% and it is considered reasonable to include within the comparison capacity assessment for new floorspace growth attributable to this inflow. Accordingly, it is considered appropriate to apportion only 35% of the deficit/surplus associated with Freeport to the Borough (15% of turnover from the Borough+20% inflow)

2009 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Newcastle-under-Lyme Borough Retail and and Town Centres Study

Table 19: Comparison Retail Capacity (sq.m) at 2011, 2016, 2021 and 2026 (taking account of floorspace efficiencies)

Centre	AT 2011			BY 2016			BY 2021			BY 2026		
	Expenditure Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expenditure Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expenditure Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expenditure Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m
Kidsgrove	1.3	3,750	358	2.5	4,059	620	4.5	4,571	984	7.2	5,047	1,430
Newcastle-under-Lyme	17.5	6,500	2,700	39.8	7,036	5,661	77.9	7,923	9,836	130.4	8,748	14,912
Other Borough	-7.3	4,500	-	-0.3	4,871	-	12.4	5,485	2,258	30.4	6,056	5,012
Sub-Total	11.6			42.0			94.8			168.0		

Notes:

Source: Table 18

Capacity Assessed assuming sales density for town centre floorspace

For other Retail Floorspace, a sales density equivalent to the mid-point of the Kidsgrove and Newcastle-under-Lyme sales densities is adopted

2009 Prices Inclusive of VAT where applicable