

Bradford Retail and Leisure Study - Housing Led Growth Scenario
Nexus Planning

Table 1: Population and Café/Restaurant Expenditure Per Capita

Zone	Population					Per Capita Expenditure - Café and Restaurant (£)					
	2026	2031	2036	2041	2043	2024	2026	2031	2036	2041	2043
1	51,211	51,590	51,943	52,716	52,788	799	811	852	897	943	952
2	30,560	31,242	33,606	34,830	34,830	1,169	1,187	1,247	1,312	1,379	1,393
3	45,886	46,750	47,907	48,075	48,075	1,133	1,150	1,209	1,272	1,336	1,350
4	27,072	28,483	30,226	31,687	31,687	443	450	473	497	523	528
5	32,312	33,591	34,947	36,229	36,469	906	920	967	1,017	1,069	1,079
6	40,036	41,035	42,127	43,447	43,447	579	588	618	650	683	690
7	29,338	30,278	31,534	33,335	33,578	761	772	812	854	898	907
8	25,924	26,366	27,178	27,982	28,148	599	608	639	672	707	714
9	41,085	41,518	42,434	43,107	43,288	704	715	751	790	830	839
10	29,400	29,833	30,749	31,422	31,603	321	326	342	360	379	382
11	72,448	73,501	75,124	77,344	77,692	418	424	446	469	493	498
12	58,788	62,382	68,260	73,909	74,368	419	425	447	470	494	499
13	49,996	51,132	52,025	52,960	52,960	461	468	492	517	544	549
14	28,311	30,171	32,031	33,929	33,929	559	567	596	627	659	666
15	61,259	61,808	62,106	62,293	62,293	943	957	1,006	1,058	1,112	1,123
Total	623,626	639,682	662,196	683,266	685,155						

Notes:

- a. Zones based on the postcode sectors as set out in the main Study
- b. Per capita expenditure derived from Experian MMG3 data (2025 report)
- c. Population derived from Experian MMG3 data (2025 report)
- d. Per capita expenditure projected forward using forecast growth rates taken from Figure 1a of Experian Retail Planner Briefing Note 23 (as set out in Table 8.1 of main report)

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Table 2: Total Available Café and Restaurant Expenditure

Zone	Expenditure (£m)					Growth (£m)
	<i>Café and Restaurant</i>					
	2026	2031	2036	2041	2043	2026-2043
1	41.5	44.0	46.6	49.7	50.3	8.7
2	36.3	39.0	44.1	48.0	48.5	12.2
3	52.8	56.5	60.9	64.3	64.9	12.1
4	12.2	13.5	15.0	16.6	16.7	4.6
5	29.7	32.5	35.5	38.7	39.4	9.6
6	23.5	25.3	27.4	29.7	30.0	6.4
7	22.7	24.6	26.9	29.9	30.4	7.8
8	15.8	16.8	18.3	19.8	20.1	4.3
9	29.4	31.2	33.5	35.8	36.3	6.9
10	9.6	10.2	11.1	11.9	12.1	2.5
11	30.7	32.8	35.2	38.1	38.7	8.0
12	25.0	27.9	32.1	36.5	37.1	12.1
13	23.4	25.1	26.9	28.8	29.1	5.7
14	16.1	18.0	20.1	22.4	22.6	6.5
15	58.6	62.2	65.7	69.3	70.0	11.3
Total	427.2	459.5	499.4	539.4	546.1	118.9

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

2024 Prices

Table 3: Cafe and Restaurant Patterns

Table 4: Cafe and Restaurant Monetary Spend

	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)	Zone 13 Cafe/Restaurant (£m)	Zone 14 Cafe/Restaurant (£m)	Zone 15 Cafe/Restaurant (£m)
Study Area																
Zone 1																
Cross Hills Village Centre	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Cross Roads Village Centre	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dog & Gun Inn, Denholme Road, Leeming, Overhops, BD22 9SN	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0
Eastburn Village Centre	1.9	1.9	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
Glusburn 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	0.0	0.0	0.0
Haworth Village Centre	4.4	3.5	0.2	0.0	0.3	0.2	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Keighley Golf Club, Howden Park, Utley, Sliden, Keighley, BD20 6DH	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	0.0	0.0
Lothensdale Village Centre	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Oakworth Village Centre	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Outfield Local Centre	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Overhops 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	0.0	0.0
Seaton Village Centre	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 1 Sub-Total	8.3	6.7	0.2	0.0	0.7	0.2	0.0	0.1	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0
Zone 2																
Addingham 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	0.0	0.0
Ben Rhydding Village Centre	3.0	0.0	2.3	0.0	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ben Rhysdyd Village Centre	1.9	1.9	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
Ilkley Town Centre	59.0	4.4	23.8	16.8	0.1	1.2	0.8	1.3	0.8	0.2	0.7	0.3	0.2	0.0	0.1	8.2
Kilnwick Village Centre	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sliden Town Centre	2.5	2.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 2 Sub-Total	66.7	8.6	26.2	16.8	0.1	1.4	1.6	1.3	0.8	0.2	0.7	0.3	0.2	0.0	0.1	8.2
Zone 3																
Brewers Fayre, Bradford Road, Sandbeds, Bingley, Keighley, BD20 5NH	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Burley in Wharfedale Village Centre	7.1	0.0	0.2	5.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	1.7
East Morton Village Centre	1.7	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0
Edwick Village Centre	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gusley Town Centre	22.4	0.0	0.5	7.8	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0	1.9	0.0	11.3
Menton Village Centre	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0
Moss & Moor, Coulsons Way, Ilkley, LS29 7HQ	3.0	0.0	0.2	1.5	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0
Olley Town Centre	10.0	0.0	2.0	5.1	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	1.2
Riddesden Local Centre	0.5	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.1	0.0
Sandbeds Local Centre	1.8	1.7	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Bradford Golf Club, Hawksworth Lane, Gusley, Leeds, LS20 8NP	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	0.0	0.0
The Dick Hudsons, Olley Road, Ilkley, BD16 3BA	0.8	0.0	0.0	0.3	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3 Sub-Total	49.0	1.7	2.9	21.6	0.3	0.9	0.1	0.7	0.0	1.7	0.0	0.0	3.2	0.4	1.3	14.2
Zone 4																
Ingrrow 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	0.0	0.0
Knighley Town Centre	18.8	2.7	1.4	2.8	0.0	1.9	0.4	0.0	0.1	0.0	0.0	0.0	0.0	0.2	0.0	1.1
Long Lee 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	0.0	0.0
Zone 4 Sub-Total	18.8	2.7	1.4	2.8	7.9	1.9	0.4	0.0	0.1	0.0	0.0	0.3	0.0	0.2	0.0	0.0
Zone 5																
Bingley St Ives Golf Club, St Ives Grove, Harden, Bingley, BD16 1AT	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	0.0	0.0
Bingley Town Centre	22.6	0.3	1.3	3.4	0.0	13.7	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.1	1.5
Crowdflatts Local Centre	0.3	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Cullingworth 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	0.0	0.0	0.0
Harden Local Centre	0.6	0.0	0.0	0.0	0.0	0.0	0.2	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0
Tarquin's Tea Rooms, Myrtle Park, Bingley, BD16 1HJ	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	0.0	0.0	0.0
The Coffee Mill, Haworth Road, Cullingworth, Bradford, BD13 5EE	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Ivy Kitchen, St Ives Grove, Harden, Bingley, BD16 1AT	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	0.0	0.0	0.0
Wilden Village Centre	1.1	0.0	0.0	0.0	0.0	0.2	0.1	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Woodbank Garden Centre & Nurseries, Harden Road, Harden, Bingley, BD16 1BE	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 5 Sub-Total	26.1	0.3	1.3	3.7	0.1	15.1	1.7	0.7	0.0	0.2	0.4	0.0	0.2	0.4	0.1	1.8
Zone 6																
Higher Ground, Hirst Lane, Bingley, Shipley, BD18 4NQ	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	0.0	0.0
Northcliffe Golf Club, High Bank Lane, Shipley, BD18 4UJ	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	0.0	0.0
Saltire Local Centre	16.6	0.3	0.0	0.3	1.2	2.0	4.9	0.7	0.0	0.0	0.1	0.0	0.0	0.2	0.0	4.9
Zone 6 Sub-Total	16.6	0.3	0.0	0.3	1.2	2.2	4.9	0.7	0.0	0.0	0.1	0.0	0.2	0.0	0.0	4.9
Zone 7																
Clayton Local Centre	0.8	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	0.0
Queensbury Village Centre	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Raggalls, Brighouse and Denholme Road, Queensbury, Bradford, BD13 1NA	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.7	1.2	0.1	0.0	0.0	0.0	0.0		

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

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Exp. with 5% Inflow (£m)	Surplus Expenditure (£m)
2026	314.7	299.0	314.7	0.0
2031	315.3	321.6	338.5	23.2
2036	318.5	349.5	367.9	49.4
2041	321.7	377.5	397.4	75.7
2043	321.1	382.2	402.3	81.3
Study Area Market Share (%)		70.0		

Notes:

- a. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure (March 2026)
b. Assumes constant market share claimed by Bradford facilities of 70.0% of Study Area expenditure

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

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq.m)
2026	0.0	0.0
2031	23.2	2,700
2036	49.4	5,700
2041	75.7	8,700
2043	81.3	9,300

Notes:

- a. Average sales density assumed to be £8,584 per sq.m at 2024 as derived from Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure (March 2026)
b. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure (March 2026)

Table 5d: Net Quantitative Capacity for Additional Café and Restaurant Floorspace in the Bradford Authority Area

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Residual Floorspace Capacity (sq m net)
2026	0.0	0.0	0.0	0
2031	23.2	0.0	23.2	2,700
2036	49.4	0.0	49.4	5,700
2041	75.7	0.0	75.7	8,700
2043	81.3	0.0	81.3	9,300

Notes:

- a. Average sales density assumed to be £8,584 per sq.m at 2024 as derived from Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure (March 2026)
b. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure (March 2026)

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Table 6: Population and Alcoholic Drinks Expenditure Per Capita

Zone	Population					Per Capita Expenditure - Alcoholic Drinks (£)					
	2026	2031	2036	2041	2043	2024	2026	2031	2036	2041	2043
1	51,211	51,590	51,943	52,716	52,788	361	366	385	405	426	430
2	30,560	31,242	33,606	34,830	34,830	490	497	523	550	578	584
3	45,886	46,750	47,907	48,075	48,075	487	494	520	547	574	580
4	27,072	28,483	30,226	31,687	31,687	225	228	240	253	265	268
5	32,312	33,591	34,947	36,229	36,469	395	401	421	443	466	471
6	40,036	41,035	42,127	43,447	43,447	268	272	286	301	316	319
7	29,338	30,278	31,534	33,335	33,578	342	347	365	384	403	407
8	25,924	26,366	27,178	27,982	28,148	293	297	313	329	346	349
9	41,085	41,518	42,434	43,107	43,288	321	326	342	360	379	382
10	29,400	29,833	30,749	31,422	31,603	168	171	179	189	198	200
11	72,448	73,501	75,124	77,344	77,692	204	207	218	229	241	243
12	58,788	62,382	68,260	73,909	74,368	242	246	258	272	285	288
13	49,996	51,132	52,025	52,960	52,960	219	222	234	246	258	261
14	28,311	30,171	32,031	33,929	33,929	269	273	287	302	317	320
15	61,259	61,808	62,106	62,293	62,293	378	384	403	424	446	450
Total	623,626	639,682	662,196	683,266	685,155						

Notes:

- a. Zones based on the postcode sectors as set out in the main Study
- b. Per capita expenditure derived from Experian MMG3 data (2025 report)
- c. Population derived from Experian MMG3 data (2025 report)
- e. Per capita expenditure projected forward using forecast growth rates taken from Figure 1a of Experian Retail Planner Briefing Note 23

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Table 7: Total Available Alcoholic Drink Expenditure

Zone	Expenditure (£m)				Growth (£m)	
	<i>Alcoholic Drinks</i>					
	2026	2031	2036	2041	2043	2026-2043
1	18.8	19.9	21.0	22.4	22.7	3.9
2	15.2	16.3	18.5	20.1	20.3	5.1
3	22.7	24.3	26.2	27.6	27.9	5.2
4	6.2	6.8	7.6	8.4	8.5	2.3
5	13.0	14.2	15.5	16.9	17.2	4.2
6	10.9	11.7	12.7	13.7	13.9	3.0
7	10.2	11.0	12.1	13.4	13.7	3.5
8	7.7	8.2	8.9	9.7	9.8	2.1
9	13.4	14.2	15.3	16.3	16.6	3.2
10	5.0	5.3	5.8	6.2	6.3	1.3
11	15.0	16.0	17.2	18.6	18.9	3.9
12	14.4	16.1	18.5	21.1	21.4	7.0
13	11.1	11.9	12.8	13.7	13.8	2.7
14	7.7	8.7	9.7	10.8	10.9	3.1
15	23.5	24.9	26.3	27.8	28.1	4.5
Total	194.8	209.7	228.2	246.8	249.9	55.2

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 8: Alcoholic Drinks Patterns

Table 9: Alcoholic Drinks Monetary Spend

Destination	Total Alcoholic Drinks (£/m)	Zone 1 Alcoholic Drinks (£/m)	Zone 2 Alcoholic Drinks (£/m)	Zone 3 Alcoholic Drinks (£/m)	Zone 4 Alcoholic Drinks (£/m)	Zone 5 Alcoholic Drinks (£/m)	Zone 6 Alcoholic Drinks (£/m)	Zone 7 Alcoholic Drinks (£/m)	Zone 8 Alcoholic Drinks (£/m)	Zone 9 Alcoholic Drinks (£/m)	Zone 10 Alcoholic Drinks (£/m)	Zone 11 Alcoholic Drinks (£/m)	Zone 12 Alcoholic Drinks (£/m)	Zone 13 Alcoholic Drinks (£/m)	Zone 14 Alcoholic Drinks (£/m)	Zone 15 Alcoholic Drinks (£/m)
Study Area																
Zone 1																
Cross Hills Village Centre	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	0.0	0.0	0.0
Cross Roads Village Centre	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	0.0	0.0	0.0
Dog & Gun Inn, Denholme Road, Leeming, Overhops, BD22 9SN	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Eastburn 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	0.0	0.0
Glusburn Village Centre	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Haworth Village Centre	0.4	4.5	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Keighley Golf Club, Howden Park, Uley, Sliden, Keighley, BD20 6DH	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	0.0	0.0
Lothersdale Village Centre	0.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Oakworth Village Centre	1.0	1.2	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Osfield 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	0.0	0.0
Overhops Village Centre	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stretton Village Centre	0.8	0.8	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 1 Sub-Total	9.7	7.8	0.0	0.0	0.3	1.0	0.0	0.4	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 2																
Addingham 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	0.0	0.0
Ben Rhydding Village Centre	1.1	0.0	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	0.0
Ben Rhydding 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	0.0	0.0	0.0
Ilkley Town Centre	16.8	0.4	7.5	3.7	0.1	0.0	0.0	0.0	0.0	0.0	0.0	1.4	3.5	0.0	0.0	0.1
Kidwick 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	0.0	0.0	0.0
Sliden Town Centre	3.2	0.7	2.5	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 2 Sub-Total	21.4	1.1	11.5	3.7	0.1	0.0	0.0	0.0	0.0	0.0	0.0	1.4	3.5	0.0	0.0	0.1
Zone 3																
Brewers Fayre, Bradford Road, Sandbeds, Bingley, Keighley, BD20 5NH	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	0.0	0.0
Burley in Wharfedale Village Centre	2.3	0.0	0.0	0.0	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
East Morton Village Centre	0.8	0.0	0.0	0.1	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0
Edwick 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	0.0	0.0	0.0
Gusley Town Centre	7.7	0.0	0.0	6.2	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0
Menston 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	0.0	0.0
Moss & Moss, Coulanes Way, Ilkley, LS29 7HQ	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	0.0	0.0
Olney Town Centre	1.3	0.0	1.4	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ridgeden Local Centre	0.4	0.1	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sandbeds Local Centre	1.1	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0
The Bradford Golf Club, Hawksworth Lane, Gusley, Leeds, LS20 8NP	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Dick Hudsons, Otley Road, Ilkley, BD16 3BA	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	0.0	0.0	0.0
Zone 3 Sub-Total	16.1	1.0	1.4	9.8	0.0	0.7	1.0	0.0	0.0	0.0	0.0	0.2	0.2	0.2	0.4	1.3
Zone 4																
Ingrow Local Centre	0.4	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	0.0
Keighley Town Centre	14.4	0.0	0.0	0.1	4.4	0.0	0.0	1.4	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0
Long Lee Local Centre	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 4 Sub-Total	15.1	0.4	1.0	0.3	5.3	0.0	1.4	0.0	0.0	0.2	0.0	0.2	0.0	0.0	0.0	0.0
Zone 5																
Bingley St Ives Golf Club, St Ives Grove, Harden, Bingley, BD16 1AT	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	0.0	0.0
Bingley Town Centre	10.0	0.1	0.0	0.0	0.0	6.2	1.5	0.1	0.0	0.0	0.3	0.2	0.2	1.0	0.0	0.4
Crowfield 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	0.0	0.0
Cullingworth Village Centre	2.3	0.0	0.0	0.0	0.0	2.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Harden Local Centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0
Targhett's Tea Rooms, Myrtle Park, Bingley, BD16 3HJ	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	0.0	0.0
The Coffee Mill, Haworth Road, Cullingworth, Bradford, BD13 5EE	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	0.0	0.0
The Ivy Kitchen, St Ives Grove, Harden, Bingley, BD16 1AT	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	0.0	0.0
Wilsden Village Centre	1.2	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	0.0	0.0
Woodbank Garden Centre & Nurseries, Harden Road, Harden, Bingley, BD16 1BE	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	0.0	0.0
Zone 5 Sub-Total	13.9	0.1	0.0	0.0	0.0	9.8	1.7	0.1	0.0	0.2	0.3	0.2	0.2	1.0	0.0	0.4
Zone 6																
Hasler Ground, Hirst Lane, Bingley, Shipley, BD18 4NQ	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	0.0	0.0
Northcliffe Golf Club, High Bank Lane, Shipley, BD18 4LJ	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	0.0	0.0	0.0
Saltare Local Centre	4.0	0.0	0.0	0.0	0.0	0.1	1.7	0.8	0.0	0.0	0.0	0.0	0.1	0.2	0.0	0.4
Zone 6 Sub-Total	4.1	0.0	0.0	0.0	0.0	0.3	1.7	0.8	0.0	0.0	0.0	0.0	0.2	0.0	0.4	0.7
Zone 7																
Clayton Local Centre	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0
Queniborough Village Centre	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Raggids, Brighouse and Denholme Road, Queniborough, Bradford, BD13 1NA	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Thornton Village Centre	2.3	0.0	0.0	0.0	0.0	0.0	0.8	1.0	0.2	0.0	0.0	0.0	0.4	0.0	0.0	0.0
Zone 7 Sub-Total	5.1	0.0	0.0	0.0	0.0	0.0	0.8	2.7	0.2	0.0	0.0	0.0	1.4	0.0	0.0	0.0
Zone 8																
Fab at The White Lion, Whitehall Road, Wake, Bradford, BD12 8LJ	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	0.0	0.0
Low Moor Village Centre	3.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	0.0	0.0
Oakenshaw Village Centre	0.5	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	0.0
Wake Local Centre	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 8 Sub-Total	4.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	0.0	0.0
Zone 9																
Birkenshaw Village Centre	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Drighlington Village Centre	2.5	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	0.0
Headfield Farm, Headfield Lane, Birkenshaw, Bradford, BD11 2DP	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Holme Wood Local Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Tong Garden Centre, Tong Lane, Bradford, BD4 0BY	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	0.0	0.0
Tong 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	0.0	0.0
Zone 9 Sub-Total	3.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Zone 10																
Bowling 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	0.0	0.0
East Bowling 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	0.0	0.0
East Bowling Local Centre	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0
Laisterdyke Local Centre	0.2	0.0	0.0	0.												

Bradford Retail and Leisure Study - Housing Led Growth Scenario
Nexus Planning

Table 10a: Estimated Capacity for Additional Licensed Premises Floorspace in Bradford Authority Area

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Exp. with 5% Inflow (£m)	Surplus Expenditure (£m)
2026	159.1	151.1	159.1	0.0
2031	159.4	162.7	171.3	11.9
2036	161.0	177.0	186.4	25.4
2041	162.6	191.5	201.6	39.0
2042	162.3	193.9	204.1	41.8
Study Area Market Share (%)		77.6		

Notes:

- a. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure (March 2026)
b. Assumes constant market share claimed by Bradford facilities of 77.6% of Study Area expenditure

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Table 10b: Gross Quantitative Capacity for Additional Licensed Premises Floorspace in Bradford Authority Area

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq.m)
2026	0.0	0
2031	11.9	1,400
2036	25.4	2,900
2041	39.0	4,500
2043	41.8	4,800

Notes:

- a. Average sales density assumed to be £8,584 per sq.m at 2024 as derived from Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure
b. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure

Table 10d: Net Quantitative Capacity for Additional Licensed Premises Floorspace in the Bradford Authority Area

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Residual Floorspace Capacity (sq m net)
2025	0.0	0.0	0.0	0
2030	11.9	0.0	11.9	1,400
2035	25.4	0.0	25.4	2,900
2040	39.0	0.0	39.0	4,500
2042	41.8	0.0	41.8	4,800

Notes:

- a. Average sales density assumed to be £8,584 per sq.m at 2024 as derived from Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure (March 2026)
b. Allows for increased turnover efficiency as set out in Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure (March 2026)