Town Centre Monitoring Report 2022

Planning

14 April 2023

Contents

1. Summary

The town centre land use survey took place between 10th October and 4th November 2022 and covered all retail premises in designated shopping frontages in Wandsworth borough. Following the introduction of the combined planning use class in 2020, for the purposes of this report premises were classified into six broad retail categories. Vacant units were recorded where a judgement was made that they were not trading on the day of the site survey which was confirmed where possible with additional research.

The following report shows that boroughwide vacancy rate has increased slightly from 12.1% in 2021 to 12.4% in 2022. While the overall Town Centre vacancy rate has remained the same at 10.7%, the individual circumstances of each Town Centre vary. For example, Wandsworth Town Centre recorded a vacancy rate of 23% in 2022 compared to 17% in 2021, whereas Clapham Junction recorded a vacancy rate of 6% compared to 9% in 2021. The vacancy rates of Local Centres have increased by 1.4% and Important Local Parades by 1.3%.

2. Introduction

1. Surveys of all the Town Centres, Local Centres, and Important Local Parades have been carried out in the Borough of Wandsworth on a biennial basis since 1988. They cover approximately 2,500 properties and the last survey was carried out in 2022. The survey collects information on all ground floor units within the protected shopping frontages. Details of the occupier, use and use class were collected enabling changes in the number of units and use class to be monitored over time. The boundaries used in this report include all the shopping frontages detailed in the Council's adopted Local Plan, 2016.

2. The information is broken down into Core Shopping frontages, Secondary Shopping frontages, Protected Other frontages, and Important Local Parades. This format enables the role of each shopping frontage to be monitored. Given their local role and catchments, retail uses in the Local Centres would be expected to concentrate on convenience (food) shopping, with comparison (durable/non-food) shopping being concentrated in the town centres. Protected Core Shopping frontages are defined in the Council's Local Plan policies as being key areas in terms of shopping function, containing a high proportion of retail uses; protected Secondary Shopping frontages are defined as playing an important complementary shopping role, containing a mix of retail, non-retail and other services appropriate to a shopping frontage; the protected Other frontages are defined as playing a complementary shopping role - these frontages also contain a range of town centre uses. The Important Local Parades have a key role in contributing to sustainable development, providing access to day-to-day necessities, such as food, newsagents, pharmacies, and post offices, within walking distance from home.

3. The survey is a snapshot record, undertaken by observation in the field and the researcher makes a judgement as to the nature of the occupier on that day. Information is not requested from landlords, but where available status is verified by an alternative data source. A judgement will be taken by the surveyor in the field as to whether the business is operating, but not open on the survey day. This would include for example, businesses only opening in the evenings.

4. The survey includes all businesses in designated shopping frontages in the borough. Units being refurbished are included in the vacancy count. In a small number of instances where it is advertised on-site that the existing/new business will be opening in the very near future, the premises will be recorded as occupied.

3. Structural changes to retailing

1. There are well-documented changes to the retail sector resulting from growth in multichannel retailing, primarily internet shopping, which has resulted in debate about the amount of shopping needed in the High Street. The most recent research suggests[1] that, over the longer-term, there will be demand for additional retail and leisure floorspace, although it is noted that this research was carried out prior to the pandemic. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to influence retailing in the high street and from traditional stores.

2. It has never been more important to monitor vacancy rates and the make-up of centres in the borough and such land use surveys are likely to be the most accurate way to measure change as planning permission for the change of use between many town centre uses is no longer required.

3. The section below looks in detail at changes introduced to the Use Class Order and permitted development rights, in particular the creation of Class E, the combined commercial class. This is perhaps the most significant change made affecting the planning of centres in decades.

[1] https://www.wandsworth.gov.uk/media/8003/retail_needs_assessment_june_2020.pdf

4. Changes to permitted development rights

In recent years the government has introduced changes to permitted development rights affecting town centres, which have made it easier to change between uses without needing planning permission, although some are subject to a prior approval process. Some of the more significant changes to PD rights affecting town centres allow:

<table>
<tr><td rowspan="2">Came into force in May 2013</td><td>change to a flexible use (A1, A2, A3 or B1 Use Classes) from A1, A2, A3, A4, or A5 for a temporary period of up to 2 years.

Some exemptions but no prior approval process.</td></tr>
<tr><td>change from B1 office to residential. Initially this change was temporary until 30th May 2016 but was subsequently made permanent in April 2016[2].

Some exemptions and limited prior approval process.</td></tr>
<tr><td rowspan="2">Came into force in April 2014</td><td>change of use and some associated physical works from a small shop or provider of professional/financial services (A1 and A2 uses) to residential use (C3).

Some exemptions and prior approval process.</td></tr>
<tr><td>retail to banks and building societies (deposit-takers) - allows change of use from a shop (A1) to a bank or a building society.

No prior approval process and few exemptions.</td></tr>
<tr><td>Came into force in April 2015</td><td>change of use from shops (A1) to financial and professional services (A2).

There is no prior approval process and no exemptions.</td></tr>
<tr><td>Came into force in April 2017</td><td>changes to permitted development rights to allow change of use from shops (A1 Use Class) to financial services (A2 Use Class).
The Council has made an Article 4 Direction to restrict this change in various centres across the borough.</td></tr>
<tr><td>Came into force in September 2020[3]</td><td>extending some temporary permitted development rights; takeaway food operations from restaurants, cafes and drinking establishments, and some emergency development rights.

Streamlining the existing 16 Use Classes into 11 by introducing three new broad Use Classes. The significant change being the introduction of the combined commercial class, (See also Section below for more detail.)
Class E - subsuming the existing A1, A2, A3, B1 (including R&D) and selected D1 and D2 Use Classes which includes retail, food, financial services, indoor sport and fitness, medical or health services, nurseries, offices and light industry. Class E will also include ‘other services which it is appropriate to provide in a commercial, business or service locality’. This is expected to comprise uses such as travel agents and post offices which were previously classified within Class A1.
Class F1 - A new Learning and Non-Residential Institutions Use Class, known as F1, embraces the remaining parts of the existing D1 Use Classes that are not included within the new Class E. This will include education, non-commercial galleries, law courts, libraries, museums, places of worship and public halls.
Class F2 - A new Local Community Use Class, known as F2, will comprises part of the current A1 and D2 Use Classes and includes small corner shops*, local community halls, outdoor recreational areas and swimming pools.
* meeting criteria which means that this protection is unlikely to be applicable in this borough

Drinking establishments are categorised as sui generis.

For any reference to Permitted Development rights, and for restrictions to them or applications for Prior Approval, the Use Classes in effect prior to 1 September 2020 will be used until the end of July 2021.</td></tr>
</table>

Please note PD rights may be amended by later versions of the General Permitted Development Order.

[2] The Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2016 introduced other changes including launderettes being included in Class M- retail and specified sui generis uses to dwelling houses.

[3] https://www.gov.uk/guidance/ensuring-the-vitality-of-town-centres

5. Introduction of combined business class

Class E (Commercial, business and service)

This new single use class amalgamates previous use classes (A1) Shops, (A2) financial/professional services, (A3) cafés/restaurants, (D1 part) medical health facilities, creche and nurseries (D2 part) indoor sports/fitness, and (B1) office/business/light industrial uses.

The sui generis use class amalgamates many of the remaining use classes, including pubs and bars, hot food takeaway and cinemas.

Use	Use Class prior to 31st August 2020	Use Class from 1st September 2020
Shop	A1	E(a)
Financial & professional services (not medical)	A2	E(c)
Café or restaurant	A3	E(b)
Pub, wine bar or drinking establishment	A4	Sui generis
Takeaway	A5	Sui generis
Office other than a use within Class A2	B1a	E(g)(i)
Clinics, health centres, creches, day nurseries, day centre	D1	E(f)
Cinemas, concert halls, bingo halls and dance halls	D2	Sui generis

The above table is a simplified list identifying the relevant associated retail uses.

Class E more broadly covers uses previously defined in the revoked Classes A1/2/3, B1, D1(a-b) and 'indoor sport' from D2(e):[4]

- E(a) Display or retail sale of goods, other than hot food
- E(b) Sale of food and drink for consumption (mostly) on the premises
- E(c) Provision of:
  - E(c)(i) Financial services,
  - E(c)(ii) Professional services (other than health or medical services), or
  - E(c)(iii) Other appropriate services in a commercial, business or service locality
- E(d) Indoor sport, recreation, or fitness (not involving motorised vehicles or firearms)
- E(e) Provision of medical or health services (except the use of premises attached to the residence of the consultant or practitioner)
- E(f) Creche, day nursery or day centre (not including a residential use)
- E(g) Uses which can be carried out in a residential area without detriment to its amenity:
  - E(g)(i) Offices to carry out any operational or administrative functions,
  - E(g)(ii) Research and development of products or processes
  - E(g)(iii) Industrial processes

[4] https://www.planningportal.co.uk/info/200130/common_projects/9/change_of_use

Since this change in legislation an Article 4 Direction (as modified by the Secretary of State) came into force on 29th July 2022 to remove permitted development rights regarding the change of use from class E use to C3 use (dwellinghouses).[5] The effect of the Direction means that a change of use from a commercial, business and service use to residential in certain locations would require planning permission and will be assessed against Local Plan policies. The Article 4 direction covers 62 areas across the borough where the main concentrations of commercial and business uses are located, including areas within centres and parades of all sizes.

6. Methodology

1. Survey results have historically been reported using the former use class order, however following the amalgamation of use classes in September 2020, this report builds on the methodology used in previous reports of a broader classification of the type of retail use into Convenience, Durables and Service categories. Details of the predominant uses in each Retail Category are described in the table below. The predominant use in some units may be unclear, however this overall classification allows comparison of the structure of overall uses in each area. For example, a Post Office may be categorised as a service retailer if it provides mainly postal services, but as a convenience retailer if it incorporates a majority of floorspace as a newsagent and stationery.

2. These retail categories are used to compare the proportion of each use between centres and within each centre considering the hierarchy of protected frontage. This shows the variation in retail categories within centres, for example the predominance of Durable/Non-food outlets in the Core frontages and more Food and Leisure outlets in the Secondary and Other Frontages.

3. This approach also allows monitoring of changes within the new E use class, to show the type of business occupying previously vacant premises, and the changing composition of retail categories in different areas of the borough.

[5] https://www.wandsworth.gov.uk/change-of-use-from-class-e-to-c3/

7. Retail Category Definitions

Convenience Retailer	Baker & Confectioner Butcher Chemist Convenience Store Cosmetics & Beauty Products Shop Delicatessen Fishmonger Florist	Greengrocer Mini Supermarket Newsagent Off Licence Pet Shop Post Office Sandwich Shop Supermarket
Durable/Non-food	Bookseller Card Carpet Carpets & Flooring Charity Children's & Infants' Wear Clothes Clothes, Crafts, Glass & Gifts Cosmetics & Beauty Products Department Store Discount Store DIY & Home Improvement	Footwear Furniture Haberdashery Homeware Jewellery, Watches & Silver Ladies' Wear & Accessories Mobile Phone Phone / Vape Sports, Camping & Leisure Goods Stationer Telephones & Accessories Toys, Games & Hobbies
Food and Leisure	Bakery/Café Bar and Restaurant Café Fast Food & Take Away Restaurant	Restaurant and Bar Sushi Bar Take Away/Restaurant Wine Bar/Restaurant
Services	Amusement Arcade Barber Beauty Salon Computer Repair Shop Cosmetics & Beauty Products Shop Courier Services Dry Cleaner & Launderette Electrical Repairs Funeral Director Glazier Hair and Beauty Salon Hairdresser Health Clinic Insurance Services Internet Café Launderette	Nail Salon Opticians Pet Grooming Phone Repairs Photo Processing Photography Studio Picture Framing Shop Post Office Print Shop Shoe Repairs & Key Cutting Tailor Tanning Salon Tattoo Parlour Taxi Hire Travel Agent Undertaker
Financial and Business	Accountant Bank & Building Society Betting Shop	Estate Agent Office Solicitor
Public Service/Facilities	Chiropodist Cinema Dentist Doctor's Surgery Education Centre Gymnasium Health Clinic Library	Medical Clinic Osteopath Physiotherapist Place of Worship School Sports & Leisure Facilities Veterinary Practice Yoga Studio

8. Summary of Vacancies

The overall number of vacant units recorded in the borough has increased by 28 since 2021 with 289 vacant units recorded in 2022. The overall vacancy rate in all frontages has increased slightly to 12.4% in 2022 from 12.1% in 2021.

*Table 1. **Boroughwide** - Vacant Units by year (All frontages)*

	2004	2006	2008	2010	2012	2014	2016	2018	2020*	2021*	2022	Average
Total Units	2346	2354	2308	2328	2322	2280	2300	2308	2120	2160	2329	2260
Vacant Units	181	170	217	218	211	177	188	251	279	261	289	215
Vacancy Rate	7.7%	7.2%	9.4%	9.4%	9.1%	7.8%	8.2%	10.9%	13.2%	12.1%	12.4%	9.5%

**Tooting Market and Broadway Market were not surveyed in 2021. Tooting Market, Roehampton Local Centre and around a third of Local Parades were not surveyed in 2020.*

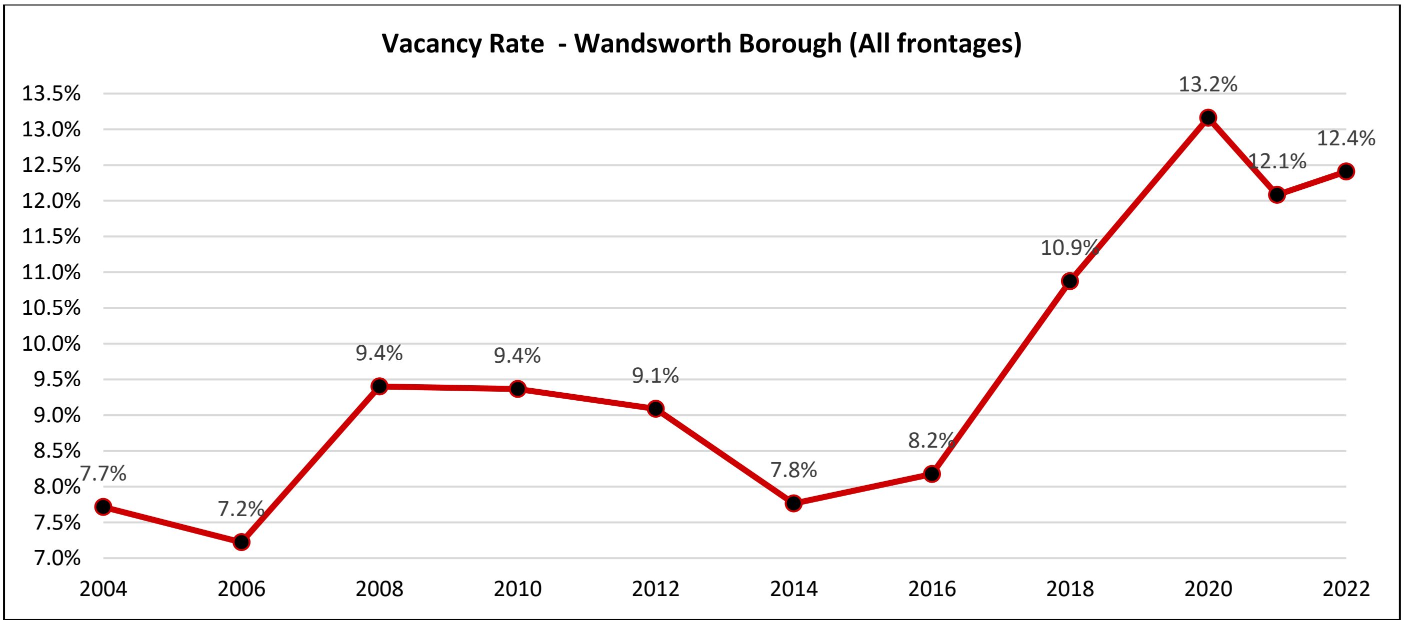


*Table 2. **Town Centres** - Vacant Units by year (All frontages)*

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	1441	1453	1445	1462	1464	1413	1435	1443	1406	1304	1442	1426
Vacant Units	96	84	118	123	120	80	110	131	182	139	155	118
Vacancy Rate	6.7%	5.8%	8.2%	8.4%	8.2%	5.7%	7.7%	9.1%	12.9%	10.7%	10.7%	8.3%

*Table 3. **Local Centres** - Vacant Units by year (All frontages)*

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	559	559	555	562	553	546	561	562	528	556	558	555
Vacant Units	49	52	61	58	62	59	43	70	68	76	84	62
Vacancy Rate	8.8%	9.3%	11.0%	10.3%	11.2%	10.8%	7.7%	12.5%	12.9%	13.7%	15.1%	11.1%

*Table 4. **Important Local Parades** - Vacant Units by year (All frontages)*

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	346	342	308	304	305	321	304	303	186	300	301	302
Vacant Units	36	34	38	37	29	38	35	50	29	46	50	38
Vacancy Rate	10.4%	9.9%	12.3%	12.2%	9.5%	11.8%	11.5%	16.5%	15.6%	15.3%	16.6%	12.7%

9. Retail Categories by Frontage

The tables and chart below show the percentage of all units by retail category and the year-on-year change in retail categories. These show for example, that the majority of Food and Leisure businesses are found in Other protected frontages, and that Durable/Non-food outlets are generally in Core frontages. It should be noted that the area covered by different types of protected frontage vary in each High Street and may not be representative of individual areas.

Table 5. Percentage of units in protected frontages by retail category

Retail Category	Core	Secondary	Other	Important Local Parade	All
Food and Leisure	11%	22%	26%	18%	21%
Durable/Non-food	32%	20%	14%	8%	18%
Services	15%	20%	18%	20%	18%
Convenience Retailer	16%	14%	10%	20%	13%
Financial and Business	7%	9%	10%	10%	10%
Public Service/Facilities	3%	3%	6%	6%	5%
Pubs and Bars	1%	3%	4%	1%	3%
Closed/Vacant	13%	9%	13%	17%	13%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Percentage of trading units in protected frontages by retail category

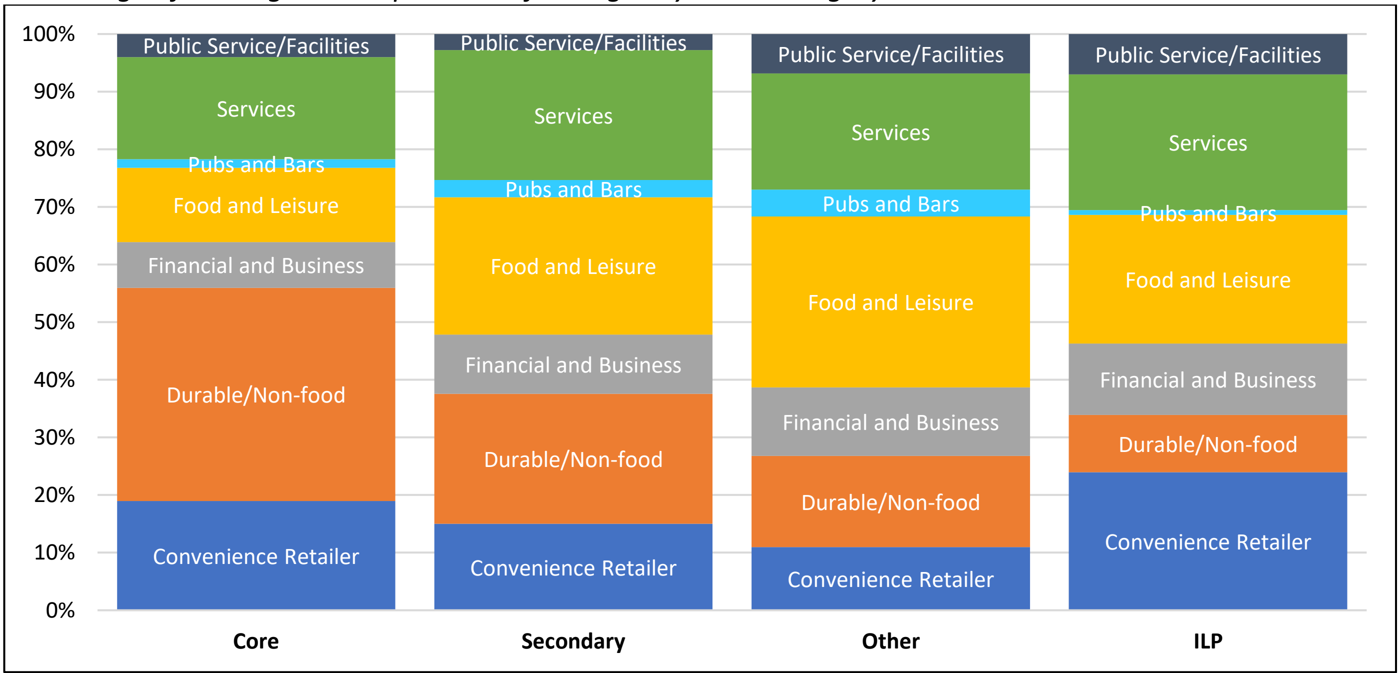
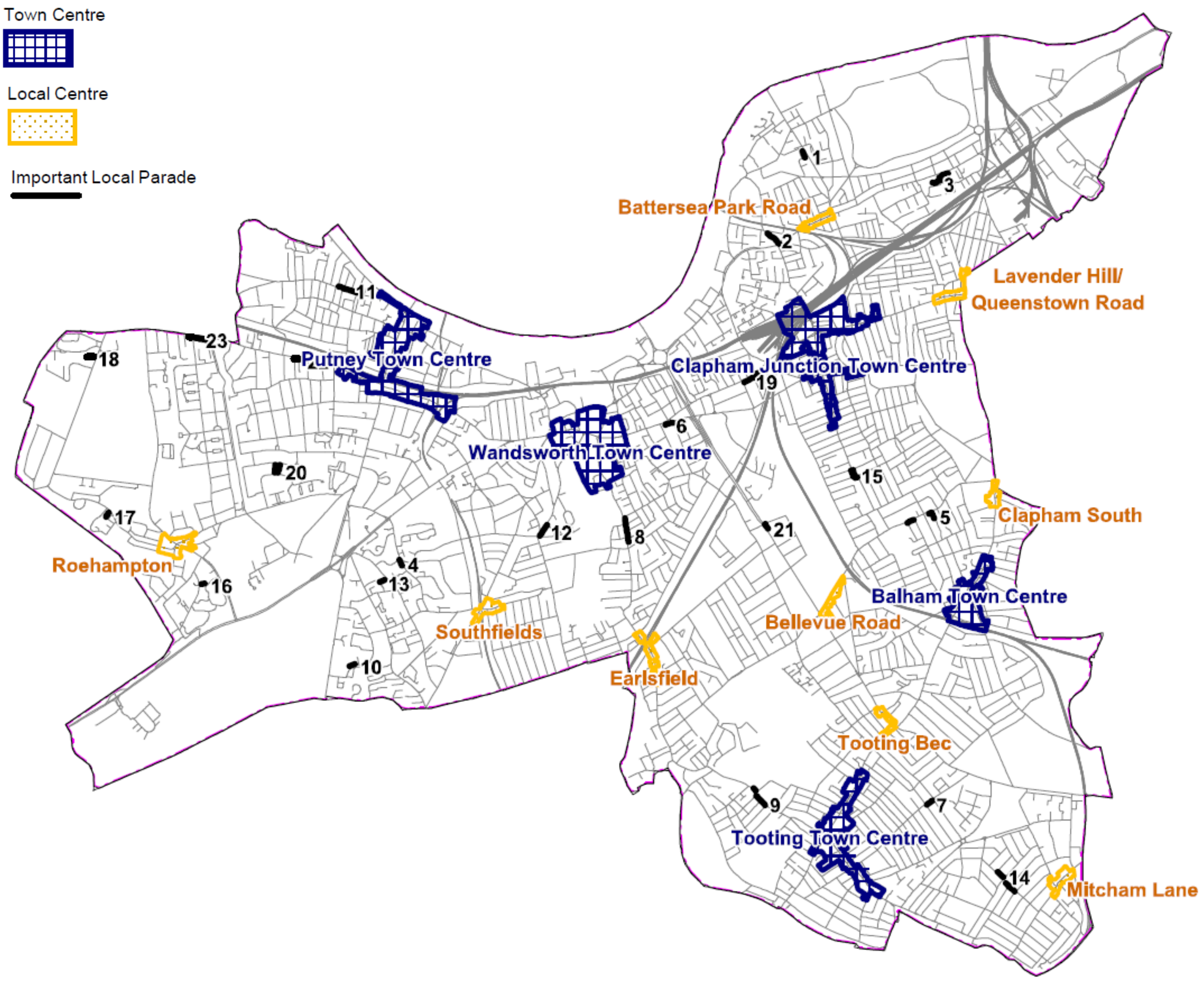


Table 6. Change in Percentage of trading units in protected frontages by retail category – 2021 to 2022

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	-0.5%	-0.8%	-1.1%	0.2%	0.3%	0.4%	0.5%
Secondary	-0.4%	0.4%	-0.7%	0.6%	-0.3%	1.4%	-0.5%
Other	-0.5%	1.8%	-2.7%	0.8%	0.0%	-1.4%	-0.1%
ILP	-1.1%	-0.8%	0.3%	-1.5%	-0.3%	-0.5%	1.8%
Total	-1.1%	0.6%	-1.5%	0.5%	-0.1%	0.1%	0.7%

10. Town Centres

There are 5 town centres in the Borough: Balham, Clapham Junction, Putney, Tooting, and Wandsworth. The adopted Local Plan sets out how the borough's centres are positioned within a hierarchy: there are 5 town centres (Balham, Clapham Junction, Putney, Tooting, and Wandsworth), nine local centres, and 23 Important Local Parades. Within the town and local centres, particular areas of the centres are designated as Core Shopping frontages, Secondary Shopping Frontages, and Protected Other frontages. The spatial arrangement of the hierarchy of centres is displayed in the map below, and further information on the location of the individual frontages can be found on pages 83 to 91 of the Wandsworth Core Strategy[6].



[6] https://www.wandsworth.gov.uk/media/3753/local_plan_core_strategy.pdf
https://maps.wandsworth.gov.uk/

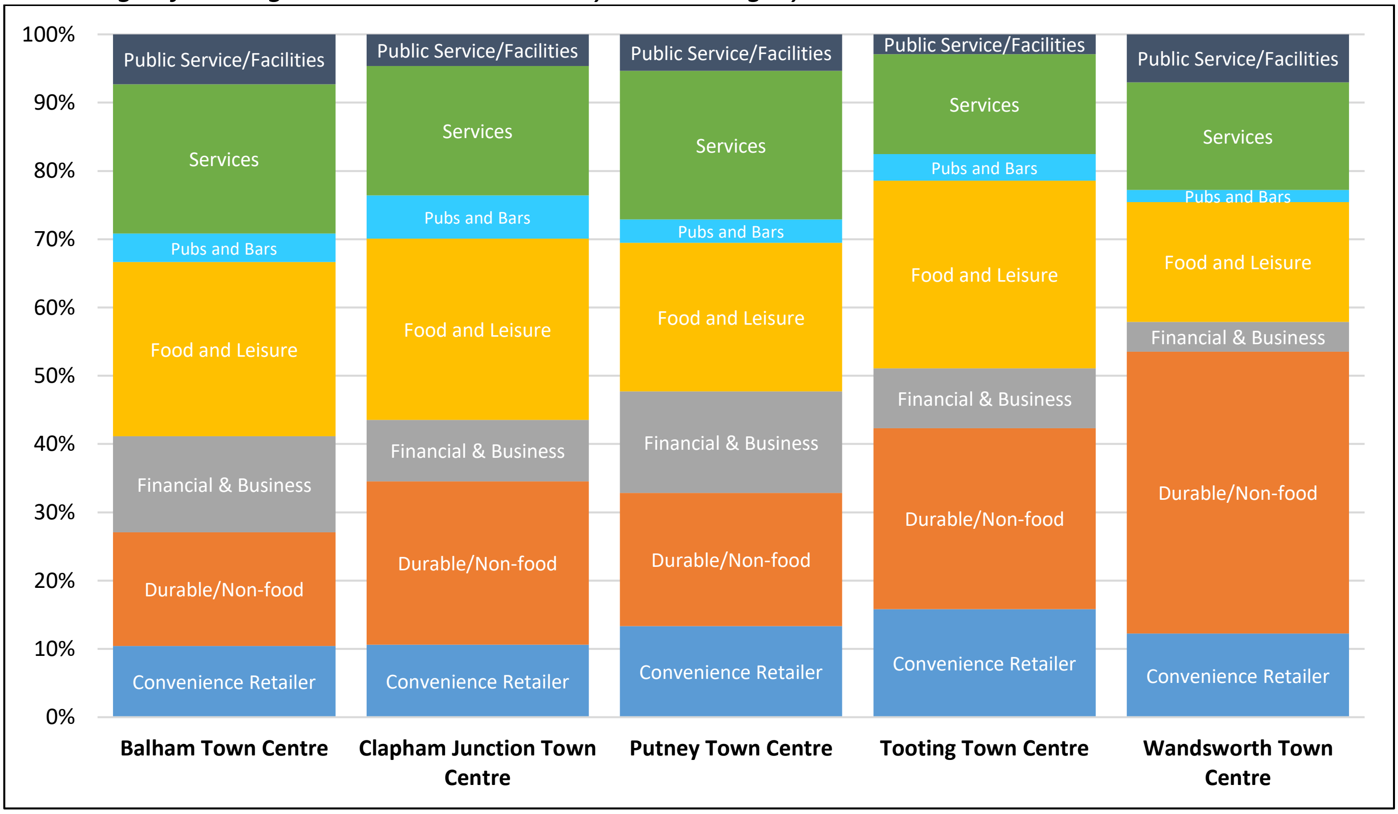
11. Town Centre - Retail Categories

The table and chart below show the percentage of all units in the retail categories that are in each Town Centre as a proportion of that category. This allows comparison of the categories between Town Centres, and shows for example, that Balham and Putney have a high proportion of Financial and Business units compared to other Town Centres, Clapham Junction has a higher proportion of Pubs and Bars, and Wandsworth a high proportion of Durable/Non-food businesses. The differences in structure of uses in each Town Centre illustrates the market forces, character, and demographic of each area. It is also important to consider the influences of the large indoor shopping centres in Putney and Wandsworth and two large indoor markets in Tooting.

Table 7. Percentage of trading units in Town Centres by retail category

Town Centre	Convenience Retailer	Durable/ Non-food	Financial & Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Balham	10%	17%	14%	26%	4%	22%	7%
Clapham Junction	11%	24%	9%	27%	6%	19%	5%
Putney	13%	19%	15%	22%	3%	22%	5%
Tooting	16%	27%	9%	27%	4%	15%	3%
Wandsworth	12%	41%	4%	18%	2%	16%	7%
Total	13%	24%	10%	25%	4%	18%	5%

Percentage of trading units in Town Centres by retail category



12. Changes in Retail Categories between 2021 - 2022

There have been minor changes in comparison with the retail categories recorded in 2021 as the table below illustrates. In Tooting, there is a notable decrease in Financial and Business and Convenience Retailers, which was offset by an apparent 6.5% increase in Food and Leisure units which is due to Tooting Market and Broadway Market being surveyed in full for the first time since 2018. Wandsworth saw 2.5% decrease in Food and Leisure units whereas Clapham Junction saw a 2.6% increase.

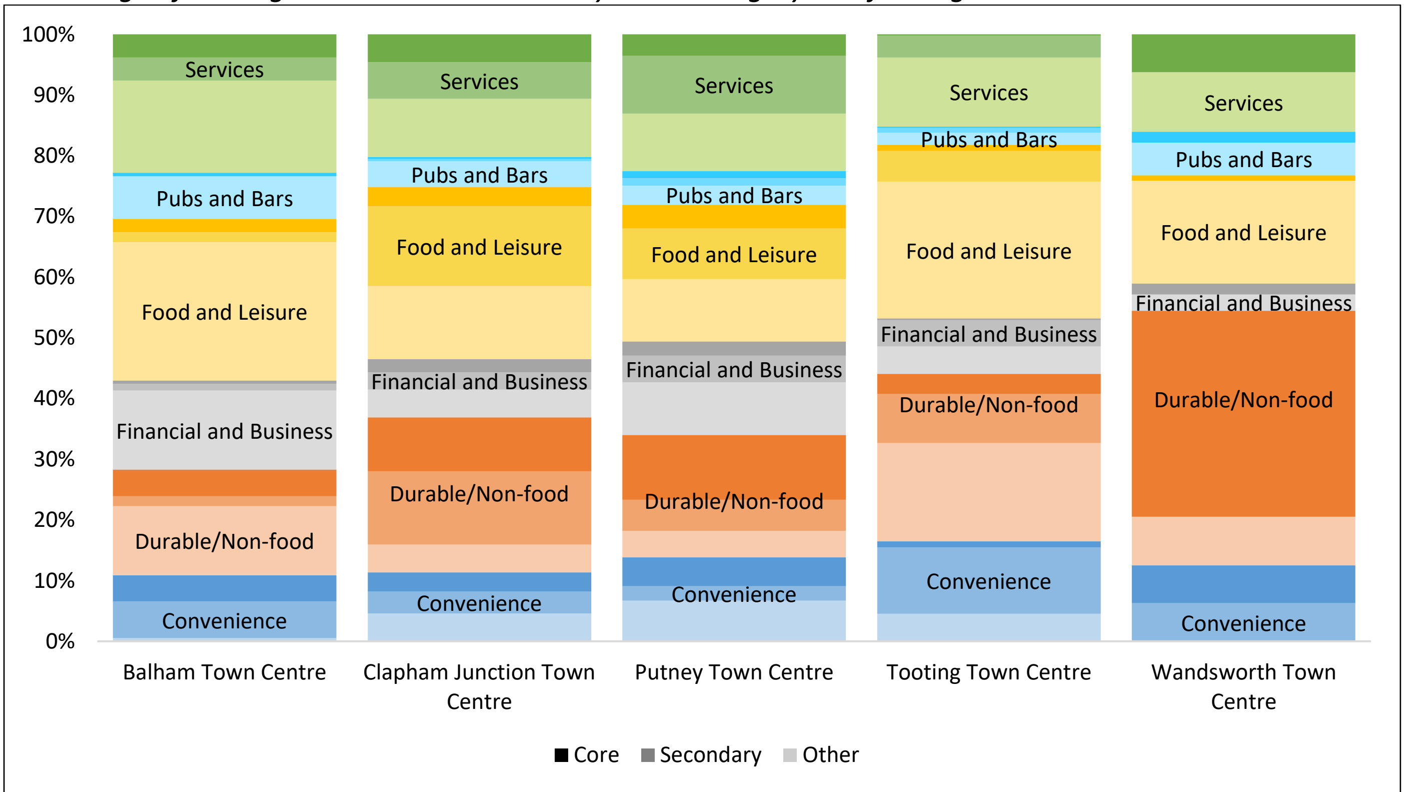
Table 8. Change in Percentage of trading units in Town Centres by retail category – 2022 compared to 2021

Town Centre	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Balham	-0.6%	1.7%	-1.9%	0.5%	0.2%	-0.1%	0.3%
Clapham Junction	-1.4%	-1.1%	-1.0%	2.6%	0.3%	0.9%	0.7%
Putney	0.4%	-0.5%	-1.1%	-1.2%	0.4%	1.8%	0.3%
Tooting	-3.2%	2.5%	-5.2%	6.5%	0.9%	-0.4%	-1.1%
Wandsworth	-0.7%	2.2%	-0.6%	-2.5%	0.8%	-0.2%	1.0%
Total	-1.0%	1.3%	-2.5%	1.9%	0.2%	0.3%	-0.2%

13. Town Centre retail categories by frontage

The chart below illustrates the diverse spread of retail uses in each Town Centre by frontage, showing that Core Frontages (in the darkest shade) often provide a larger proportion of Durable/Non-Food and Convenience units. Secondary and Other Frontages (in the lighter shades) generally provide a higher proportion of Services, Pubs and Bars, Food and Leisure, and Financial and Business units.

Percentage of trading units in Town Centres by retail category and frontage



14. Town Centres – Retail Categories by Frontage

Table 9. Town Centres – Convenience Retailers

Town Centre	Core	Secondary	Other
Balham	26%	6%	8%
Clapham Junction	14%	11%	8%
Putney	18%	18%	6%
Tooting	17%	17%	15%
Wandsworth	12%	0%	12%

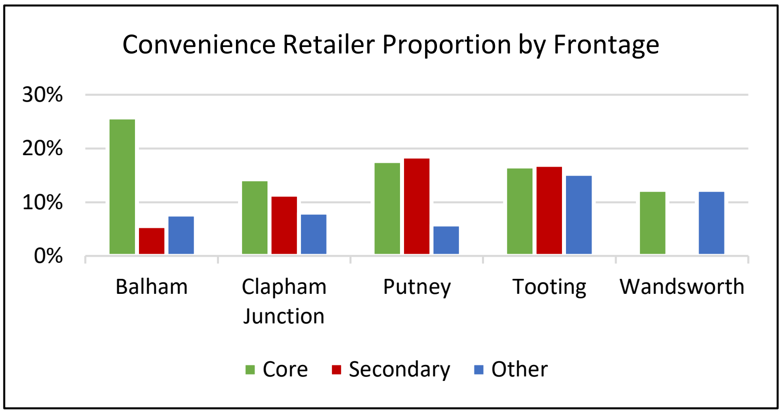


Table 10. Town Centres – Services

Town Centre	Core	Secondary	Other
Balham	23%	39%	20%
Clapham Junction	21%	15%	22%
Putney	13%	26%	24%
Tooting	4%	13%	16%
Wandsworth	12%	0%	16%

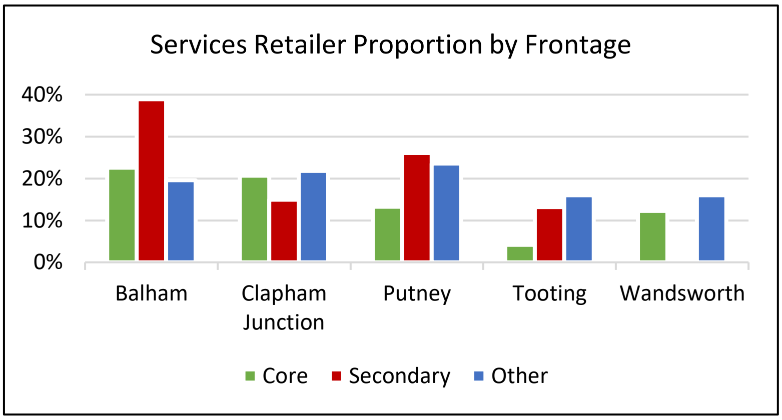
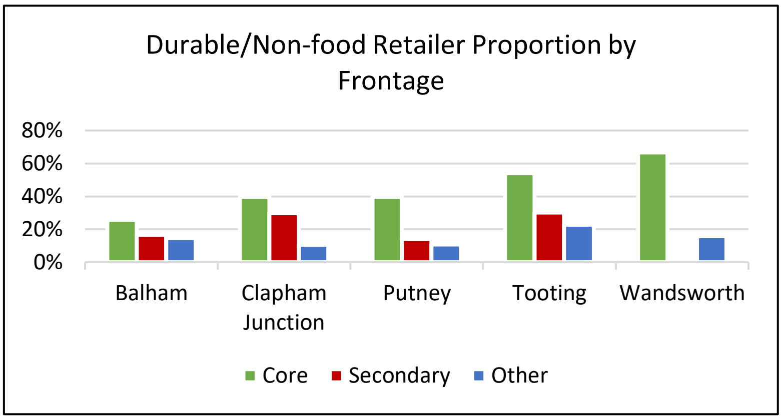


Table 11. Town Centres – Durable/Non-food

Town Centre	Core	Secondary	Other
Balham	26%	17%	15%
Clapham Junction	40%	30%	10%
Putney	40%	14%	11%
Tooting	54%	30%	23%
Wandsworth	67%	0%	16%



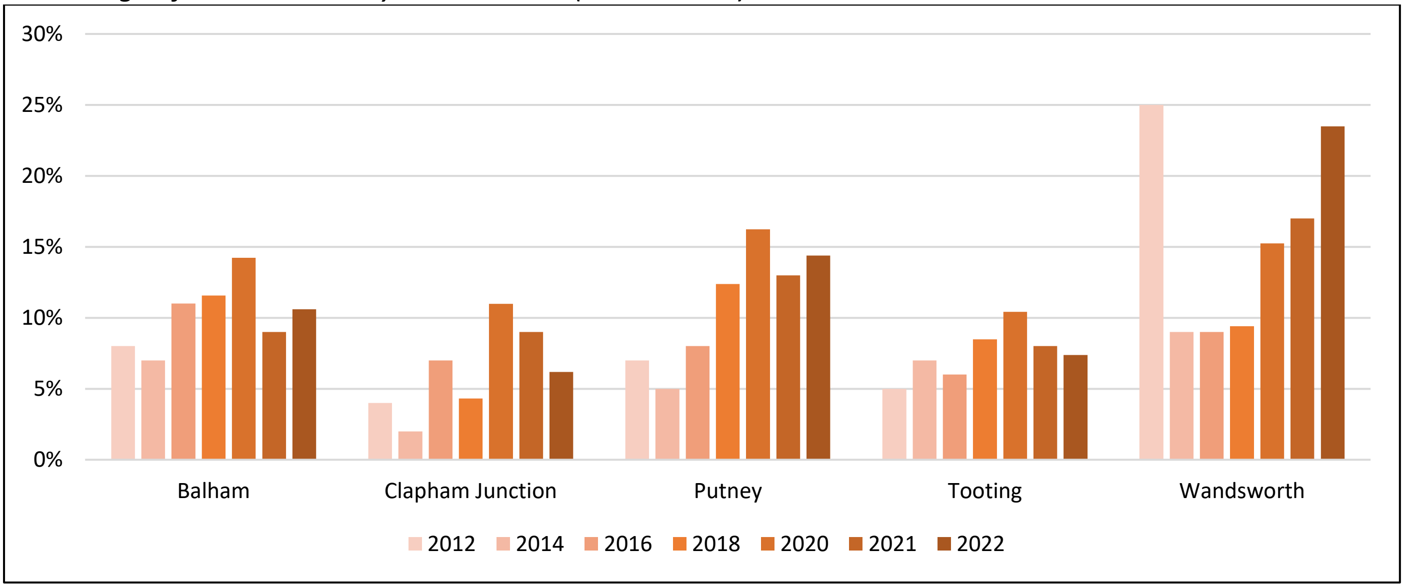
15. Town Centres – Summary of Vacancies

The table and chart below show the change in the percentage of vacant units in each of the Town Centres between 2014 and 2022. These are described in greater detail in the individual Town Centre sections of this report, but they show that vacancy rates have decreased in Clapham Junction and Tooting with minor increases in Balham and Putney and a more pronounced increase in Wandsworth.

Table 12. Number of Units and Percentage of Vacant Units by Town Centre (2014 - 2022)

Town Centre	2014		2016		2018		2020		2021		2022	
	No Units	% Vacant	No Units	% Vacant	No Units	% Vacant	No Units	% Vacant	No Units	% Vacant	No Units	% Vacant
Balham	209	7%	214	11%	216	12%	217	14%	218	9%	217	11%
Clapham Jctn	323	2%	322	7%	324	4%	328	11%	325	9%	323	6%
Putney	307	5%	306	8%	307	12%	308	16%	306	13%	306	14%
Tooting	430	7%	450	6%	448	8%	403	10%	309	8%	447	7%
Wandsworth	144	9%	143	9%	149	9%	151	15%	148	17%	149	23%
Total	**1,413**	**6%**	**1,435**	**8%**	**1,443**	**9%**	**1,407**	**13%**	**1,306**	**11%**	**1,442**	**11%**

Percentage of Vacant Units by Town Centre (2012 - 2022)



16. Change in Vacant Units - 2021 – 2022

Units may become vacant for various reasons such as a change in ownership, a drop in trade, or a move to a larger or smaller unit for economic reasons. Units may also have been recorded as vacant both in 2021 and 2022 but may have been occupied by a successful business in the intervening period.

Across the five Town Centres a total of 155 units were recorded as closed/vacant in 2022. 72 of the 155 vacant units recorded in 2022 were also recorded as closed/vacant in 2021, and 6 were recorded as under renovation in 2021. Of the 155 vacant units the largest proportion of previous uses in 2021 were 25 Food and Leisure units, 13 Financial and Business units and 11 Durable/Non-Food units. 11 of the 155 vacant units were not surveyed in 2021.

17. Town Centres – Vacancies by Frontage

The town centres vary in size and have largely retained their level of retail use and low vacancy rates. The total number of units across all the protected frontages shows little change over the longer term. The overall vacancy rate in 2022 has remained the same at 11%. The vacancy rates across Core and Other frontages are slightly above average and since 2021 they have increased by 0.3% across Core frontages and by 1.1% across Other frontages. Across Secondary frontages the vacancy rate has decreased by 2.2%.

Table 13. Vacant Units by year - Town Centres (All frontages)

	2004	2006	2008	2010	2012	2014	2016	2018	2020*	2021*	2022	Average
Total Units	1441	1453	1445	1462	1464	1413	1435	1443	1406	1306	1442	1428
Vacant Units	96	84	118	123	120	80	110	131	183	139	155	122
Vacancy Rate	7%	6%	8%	8%	8%	6%	8%	9%	13%	11%	11%	9%

**Tooting Market was not surveyed in 2020 or 2021. Broadway Market was not surveyed in 2021.*

Vacant Units by year - Town Centres (All frontages)

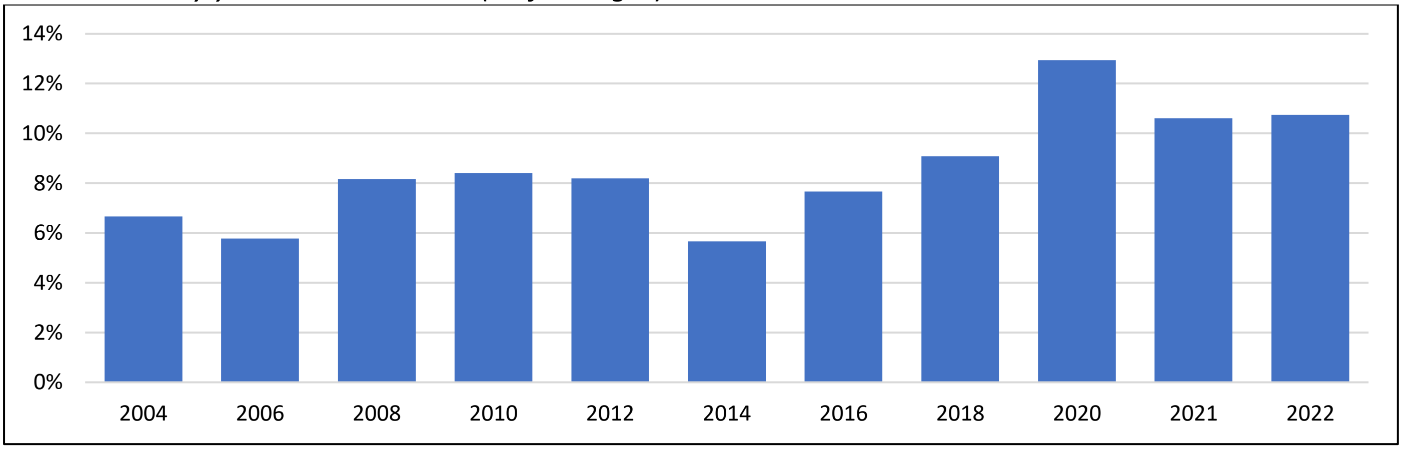


Table 14. Vacant Units by year - Town Centres (Core frontages)

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	273	276	275	307	308	282	278	277	279	275	275	280
Vacant Units	9	7	14	36	41	15	18	29	36	31	32	24
Vacancy Rate	3%	3%	5%	12%	13%	5%	6%	10%	13%	11%	12%	8%

Table 15. Vacant Units by year - Town Centres (Secondary frontages)

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	371	371	367	373	351	337	357	354	359	354	354	360
Vacant Units	33	28	26	29	18	12	24	26	42	32	24	27
Vacancy Rate	9%	8%	7%	8%	5%	4%	7%	7%	12%	9%	7%	7%

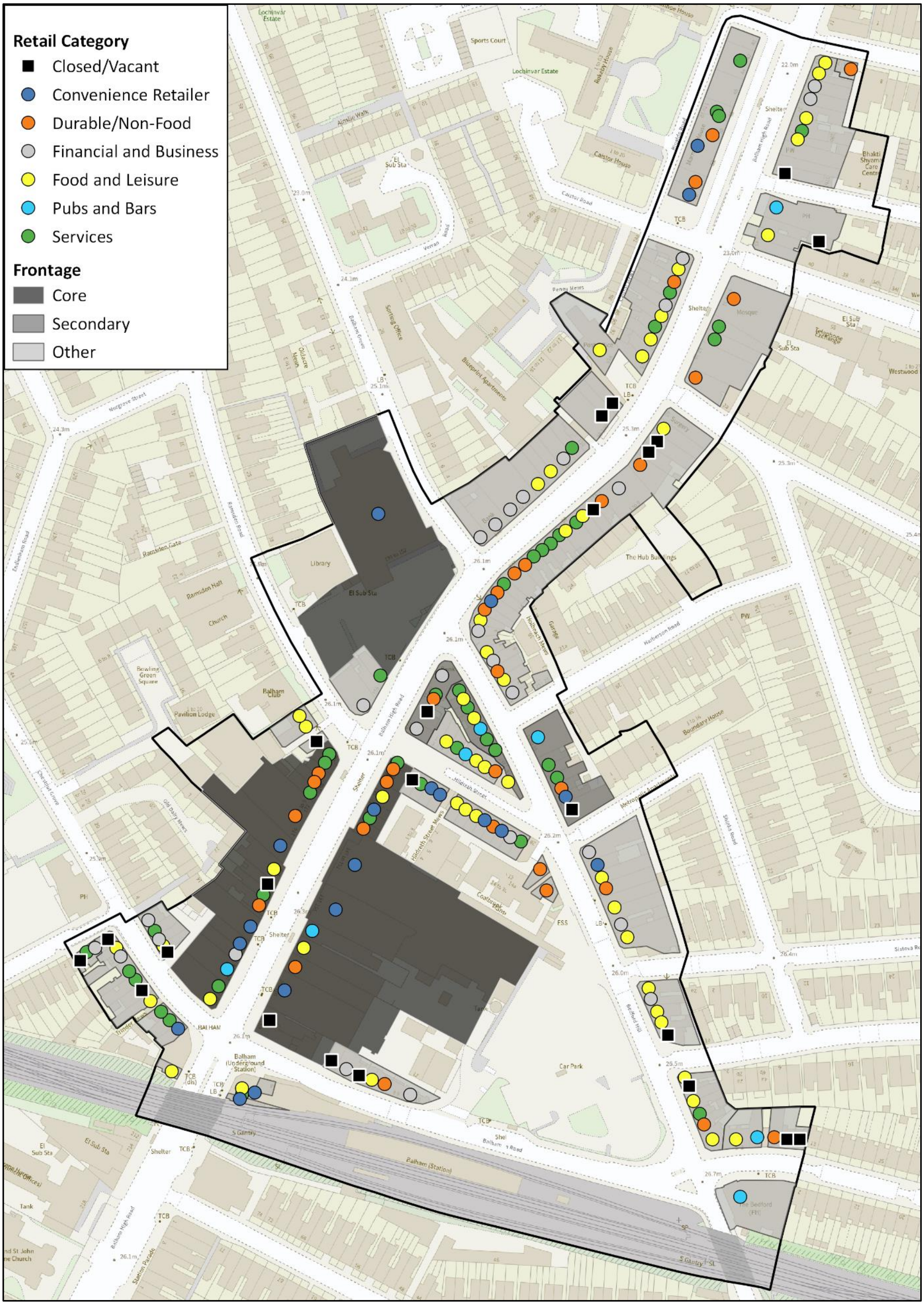
Table 16. Vacant Units by year - Town Centres (Other frontages)

	2004	2006	2008	2010	2012	2014	2016	2018	2020*	2021*	2022	Average
Total Units	797	806	803	782	805	794	800	812	768	677	806	786
Vacant Units	54	49	78	58	61	53	68	76	104	76	99	68
Vacancy Rate	7%	6%	10%	7%	8%	7%	9%	9%	14%	11%	12%	9%

**Tooting Market was not surveyed in 2020 or 2021. Broadway Market was not surveyed in 2021.*

18. Balham Town Centre - Headline results

The combined vacancy rate in Balham Town Centre (all uses) has increased from 9% in 2021 to 11% in 2022. While the number of vacant units in Core and Secondary frontages have remained the same in 2022, there was a slight increase in the number of vacant units in the Other frontages, increasing from 10% to 12%.



19. Balham Town Centre – Vacancies by Frontage

- There were 23 vacant/closed units in Balham Town Centre of which 9 were newly vacant (including 3 units previously recorded as Financial and Business and 3 recorded Food and Leisure).
- 13 units recorded as vacant/closed in 2021 were again recorded as vacant/closed in 2022.
- Most vacant units were in Other protected frontages, including 7 at Balham High Road and 3 at Chestnut Grove.

Table 17. Vacant Units by year (All designated frontages) – Balham Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	215	217	214	214	212	209	214	216	218	218	215	215
Vacant Units	21	18	16	17	16	14	23	25	31	20	23	20
Vacancy Rate	10%	8%	7%	8%	8%	7%	11%	12%	14%	9%	11%	9%

Vacant Units by year (All designated frontages) – Balham Town Centre

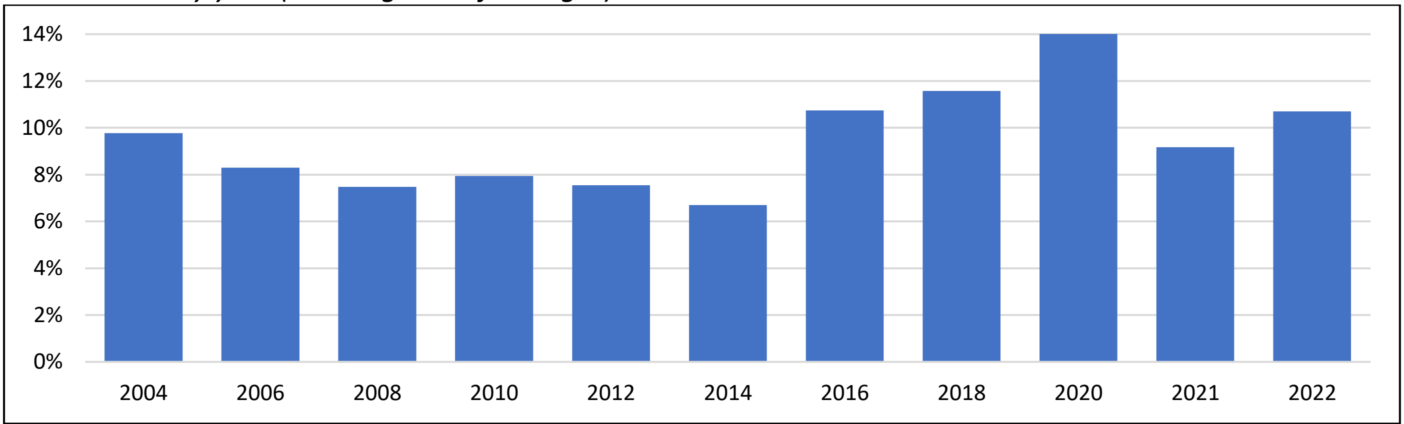


Table 18. Vacant Units by Year (Core frontages) - Balham Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	32	33	33	33	34	33	33	33	33	33	33	33
Vacant Units	0	1	0	1	2	2	1	4	4	2	2	2
Vacancy Rate	0%	3%	0%	3%	6%	6%	3%	12%	12%	6%	6%	5%

Table 19. Vacant Units by Year (Secondary frontages) - Balham Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	67	67	67	38	38	21	20	20	20	20	20	36
Vacant Units	8	4	4	4	3	0	0	0	2	2	2	3
Vacancy Rate	12%	6%	6%	11%	8%	0%	0%	0%	10%	10%	10%	7%

Table 20. Vacant Units by Year (Other frontages) - Balham Town Centre

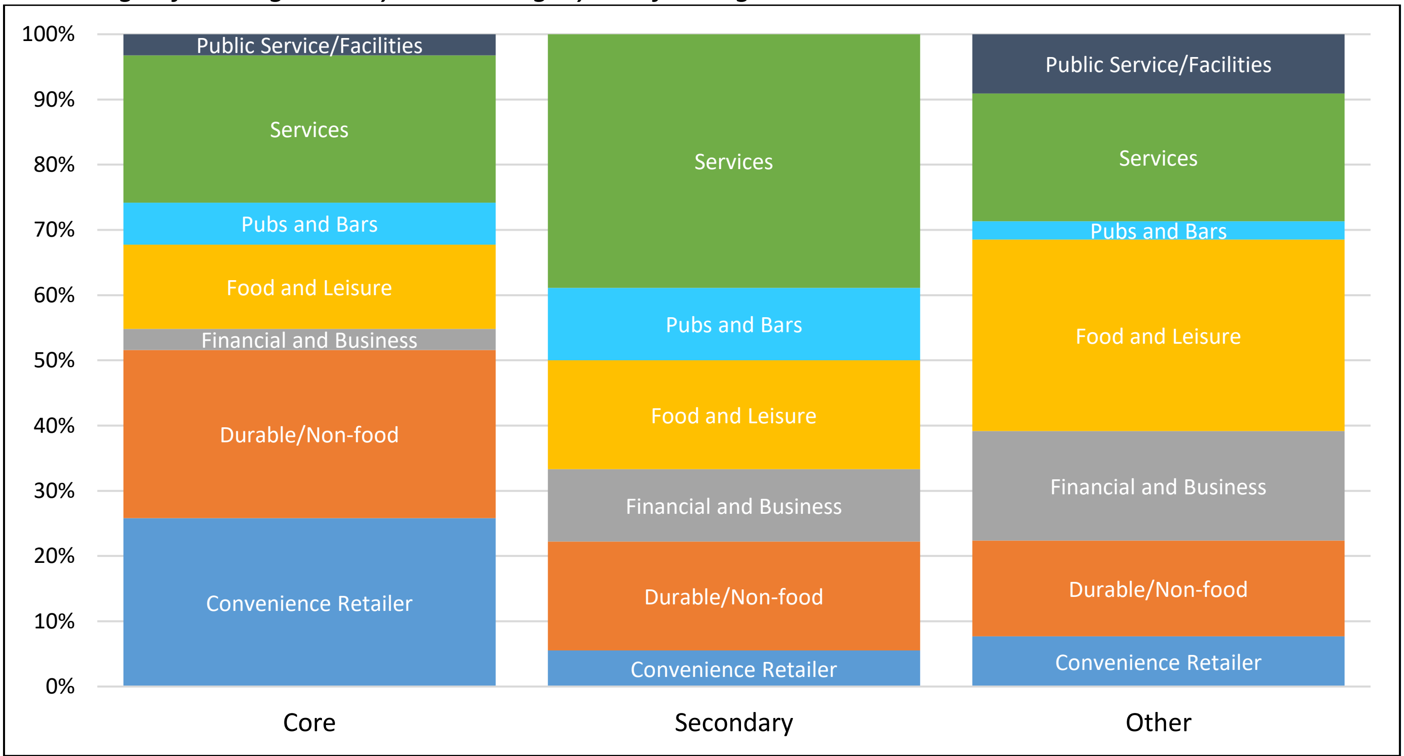
	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	116	117	114	143	140	155	161	163	165	165	162	146
Vacant Units	13	13	12	12	11	12	23	21	25	16	19	16
Vacancy Rate	11%	11%	11%	8%	8%	8%	14%	13%	15%	10%	12%	11%

20. Balham Town Centre – Retail Categories

Table 21. Percentage of trading units by retail category and frontage - Balham Town Centre

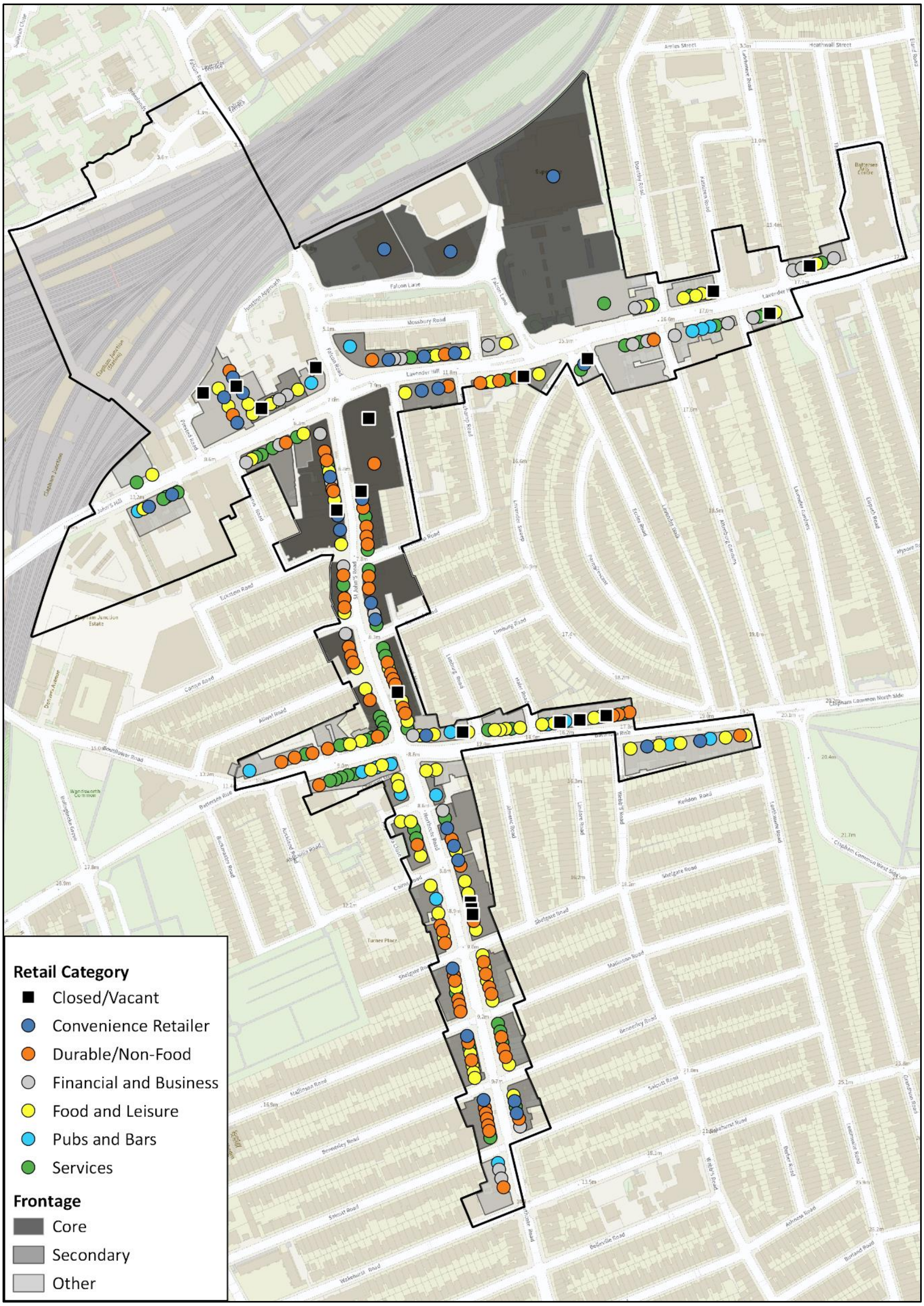
Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	26%	26%	3%	13%	6%	23%	3%
Secondary	6%	17%	11%	17%	11%	39%	0%
Other	8%	15%	17%	29%	3%	20%	9%
Total	26%	26%	3%	13%	6%	23%	3%

Percentage of trading units by retail category and frontage - Balham Town Centre



21. Clapham Junction Town Centre - Headline results

The combined vacancy rate in Clapham Junction Town Centre (all frontages) had remained consistently low between 2004 to 2018 - generally between 2-5%. In 2022 the all frontage vacancy rate was 6%, a decrease from the 9% vacancy rate in 2021. There was a 1% decrease in the vacancy rate in the Core and Other frontages and a 7% decrease in the Secondary Frontages.



22. Clapham Junction Town Centre – Vacancies by Frontage

- In 2022 there were 20 vacant units in Clapham Junction Town Centre, which is a reduction on the 30 vacancies recorded in 2021, but still slightly above the average of 17.
- 9 of these 20 vacant units were newly vacant, including national non-food chain store closures and two restaurants.
- 11 of the vacant units were also recorded as vacant in the 2021 survey, and 6 units have remained vacant since the 2020 survey.
- Lavender Hill had the most vacant units (5), followed by Battersea Rise (4).

Table 22. Vacant Units by year (All designated frontages) - Clapham Junction Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	334	335	333	334	334	323	322	324	328	325	321	329
Vacant Units	11	10	11	10	14	6	21	17	36	30	20	17
Vacancy Rate	3%	3%	3%	3%	4%	2%	7%	5%	11%	9%	6%	5%

Vacant Units by year (All designated frontages) - Clapham Junction Town Centre

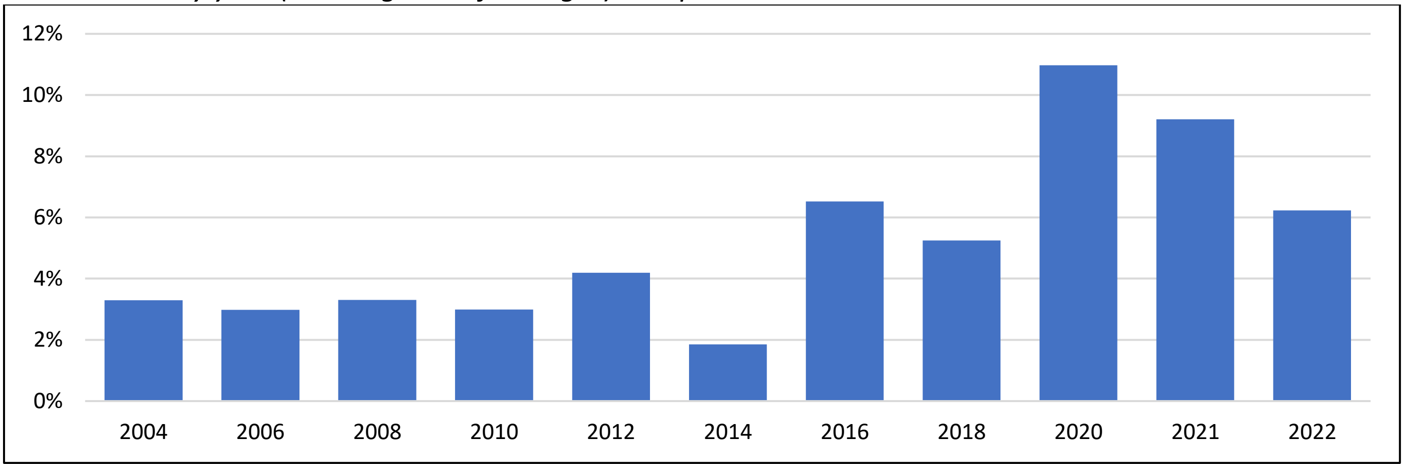


Table 23. Vacant Units by year (Core frontages) - Clapham Junction Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	68	69	69	69	69	69	68	68	69	68	67	69
Vacant Units	0	0	3	1	3	1	5	6	6	5	4	3
Vacancy Rate	0%	0%	4%	1%	4%	1%	7%	9%	9%	7%	6%	4%

Table 24. Vacant Units by year (Secondary frontages) - Clapham Junction Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	76	77	76	93	93	100	116	117	119	119	119	99
Vacant Units	4	5	3	4	4	0	9	7	14	13	5	6
Vacancy Rate	5%	6%	4%	4%	4%	0%	8%	6%	12%	11%	4%	6%

Table 25. Vacant Units by year (Other frontages) - Clapham Junction Town Centre

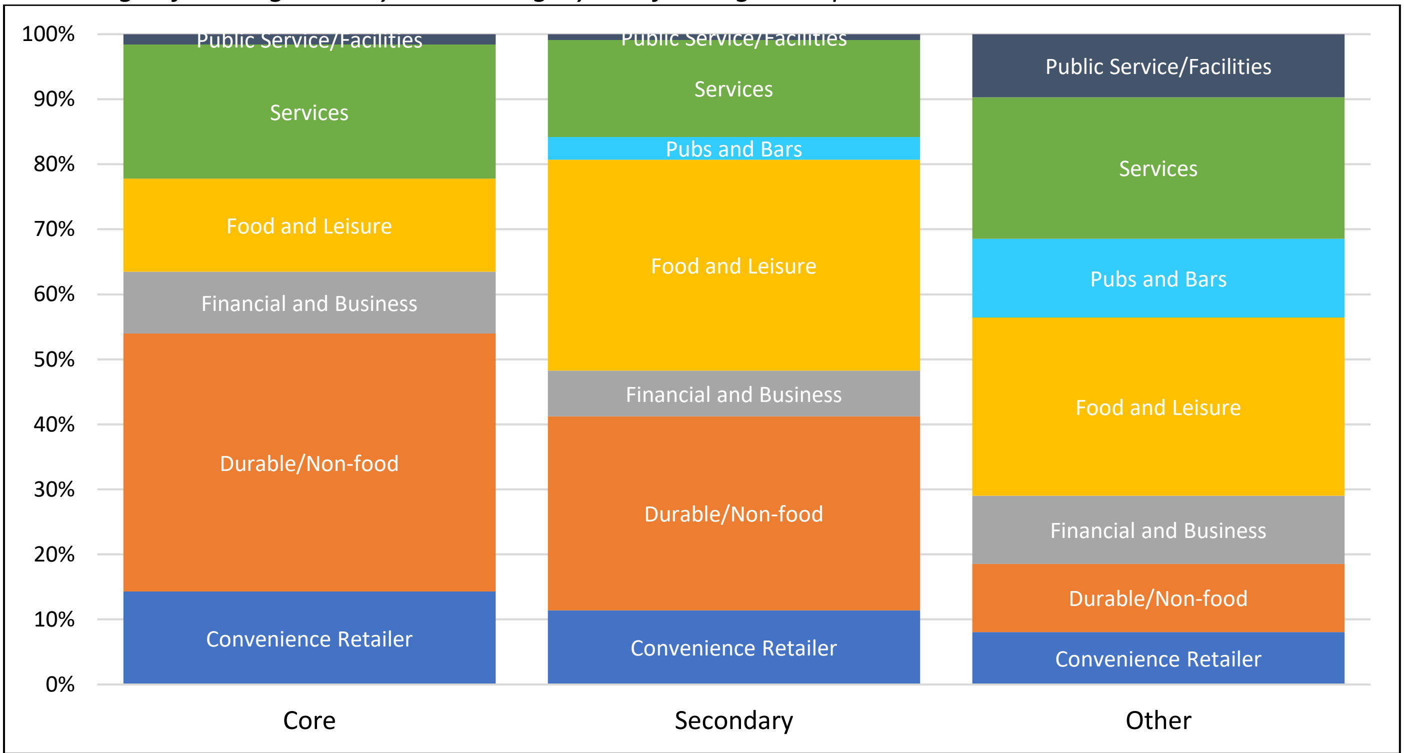
	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	190	189	188	172	172	154	138	139	140	138	135	162
Vacant Units	7	5	5	5	7	5	7	4	16	12	11	7
Vacancy Rate	4%	3%	3%	3%	4%	3%	5%	3%	11%	9%	8%	5%

23. Clapham Junction Town Centre - Retail Categories

Table 26. Percentage of trading units by retail category and frontage - Clapham Junction Town Centre

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	14%	40%	10%	14%	0%	21%	2%
Secondary	11%	30%	7%	32%	4%	15%	1%
Other	8%	10%	10%	27%	12%	22%	10%
Total	**11%**	**24%**	**9%**	**27%**	**6%**	**19%**	**5%**

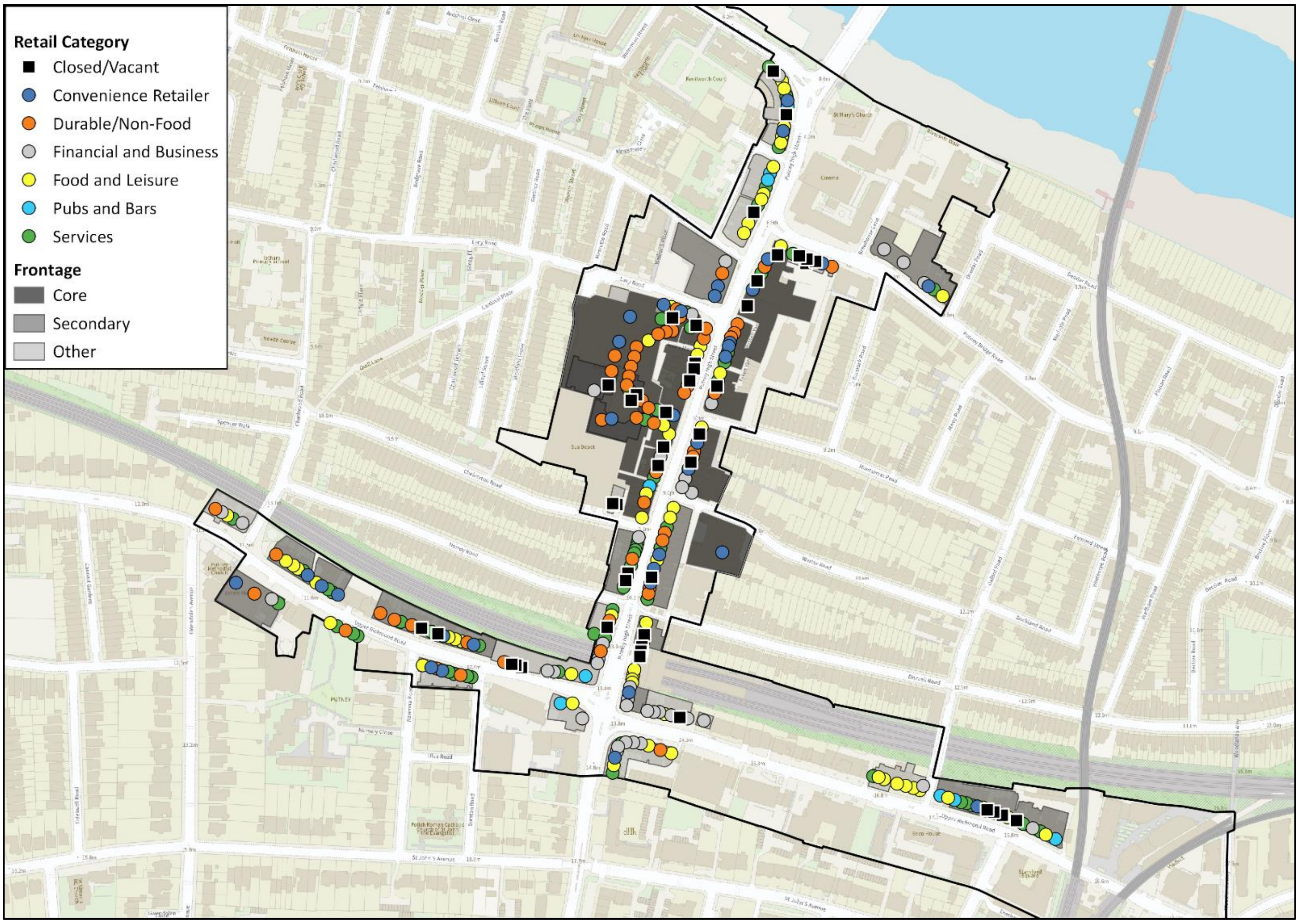
Percentage of trading units by retail category and frontage - Clapham Junction Town Centre



24. Putney Town Centre – Headline Results

In 2022, 44 units were recorded as closed/vacant across all frontages in Putney Town Centre (a vacancy rate of 14%), which is a slight increase on the 40 vacancies in 2021.

Core frontages saw the same number of vacancies in 2020, 2021, and 2022 (16 units). Secondary frontages had 2 fewer vacancies whereas the vacancy rate of Other Frontages increased from 8% in 2021 to 13% in 2022.



25. Putney Town Centre – Vacancies by Frontage

- 24 of the 44 vacant units in 2022 were newly vacant, including:
  - 11 Food and Leisure units, including 7 restaurants and 3 cafes.
  - 5 Durable/Non-food units, including two national stationery retailers.
  - 4 Financial and Business units, including a betting shop, estate agents, and a travel agency.
- 20 units recorded as closed/vacant in 2021 remained unoccupied in 2022, with 8 of these units being in Core frontages.
- Putney High Street had 27 vacant units (including 5 in Putney Exchange) and Upper Richmond Road had 10 vacant units.

Table 27. Vacant Units by year (All designated frontages) - Putney Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	317	315	312	315	315	307	306	307	308	306	306	310
Vacant Units	18	13	15	21	22	15	26	38	50	40	44	27
Vacancy Rate	6%	4%	5%	7%	7%	5%	8%	12%	16%	13%	14%	9%

Vacant Units by year (All designated frontages) - Putney Town Centre

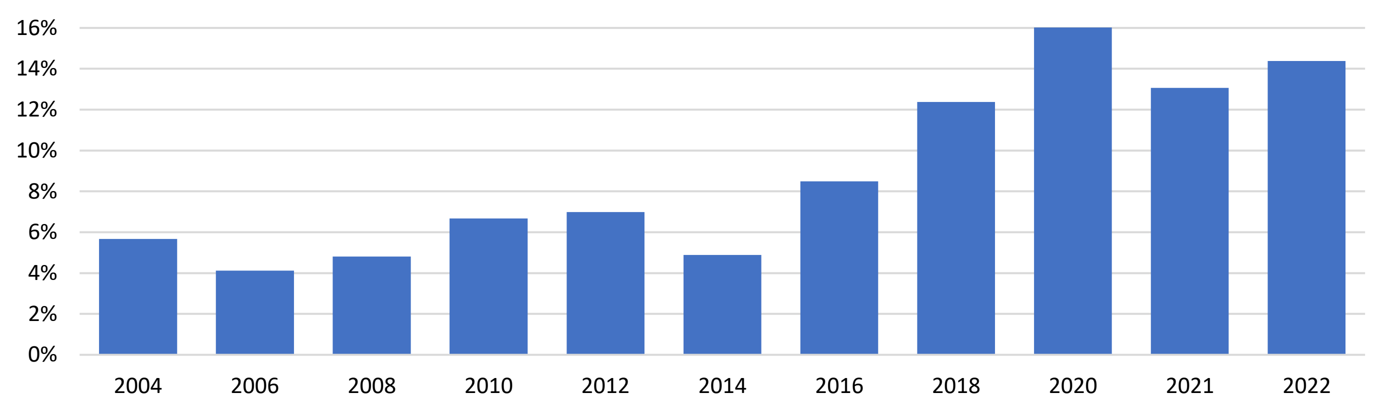


Table 28. Vacant Units by year (Core frontages) - Putney Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	95	94	94	92	91	89	85	85	85	84	84	89
Vacant Units	4	3	3	9	7	6	6	15	16	16	16	9
Vacancy Rate	4%	3%	3%	10%	8%	7%	7%	18%	19%	19%	19%	10%

Table 29. Vacant Units by year (Secondary frontages) - Putney Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	103	102	100	107	107	105	107	106	107	105	105	105
Vacant Units	6	5	5	7	5	7	9	13	19	15	13	9
Vacancy Rate	6%	5%	5%	7%	5%	7%	8%	12%	18%	14%	12%	9%

Table 30. Vacant Units by year (Other frontages) - Putney Town Centre

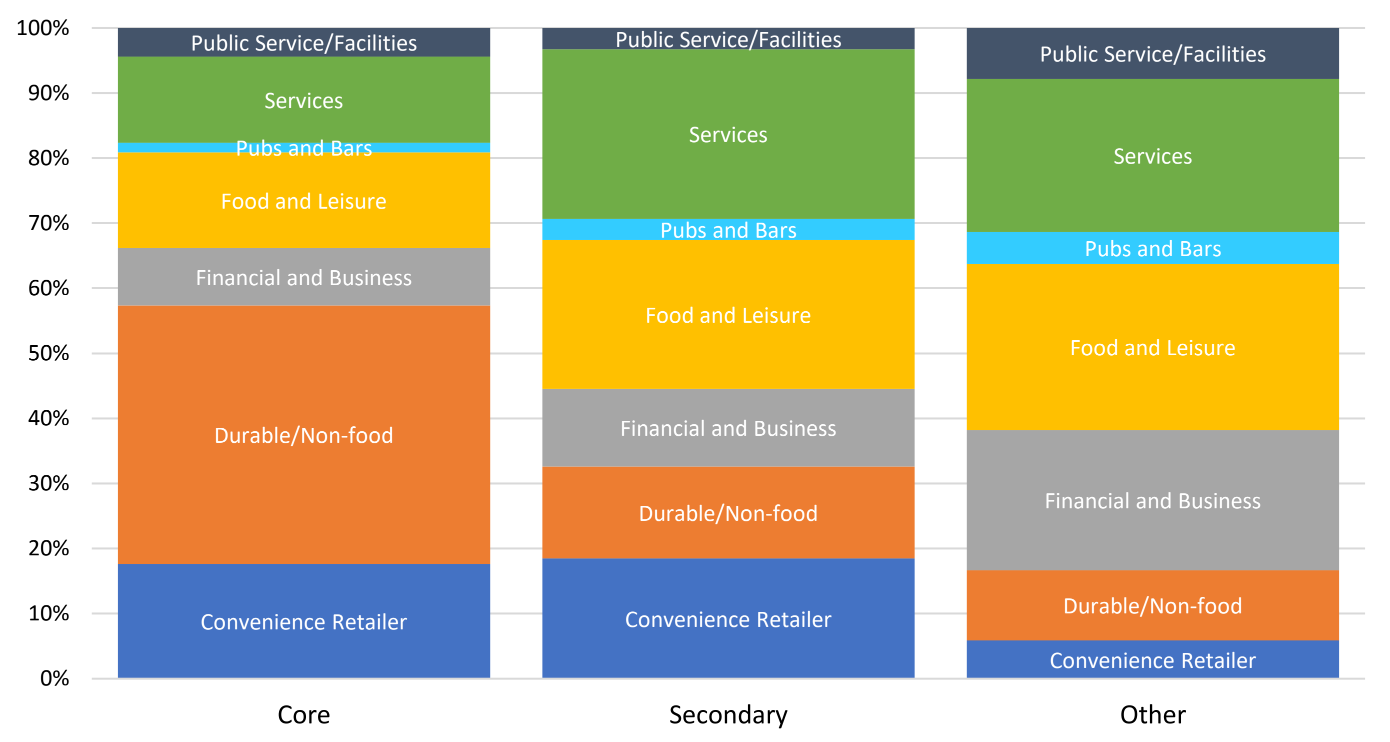
	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	119	119	118	116	117	113	114	113	116	117	117	116
Vacant Units	8	5	7	5	10	2	11	7	15	9	15	9
Vacancy Rate	7%	4%	6%	4%	9%	2%	10%	6%	13%	8%	13%	7%

26. Putney Town Centre - Retail Categories

Table 31. Percentage of trading units by retail category and frontage - Putney Town Centre

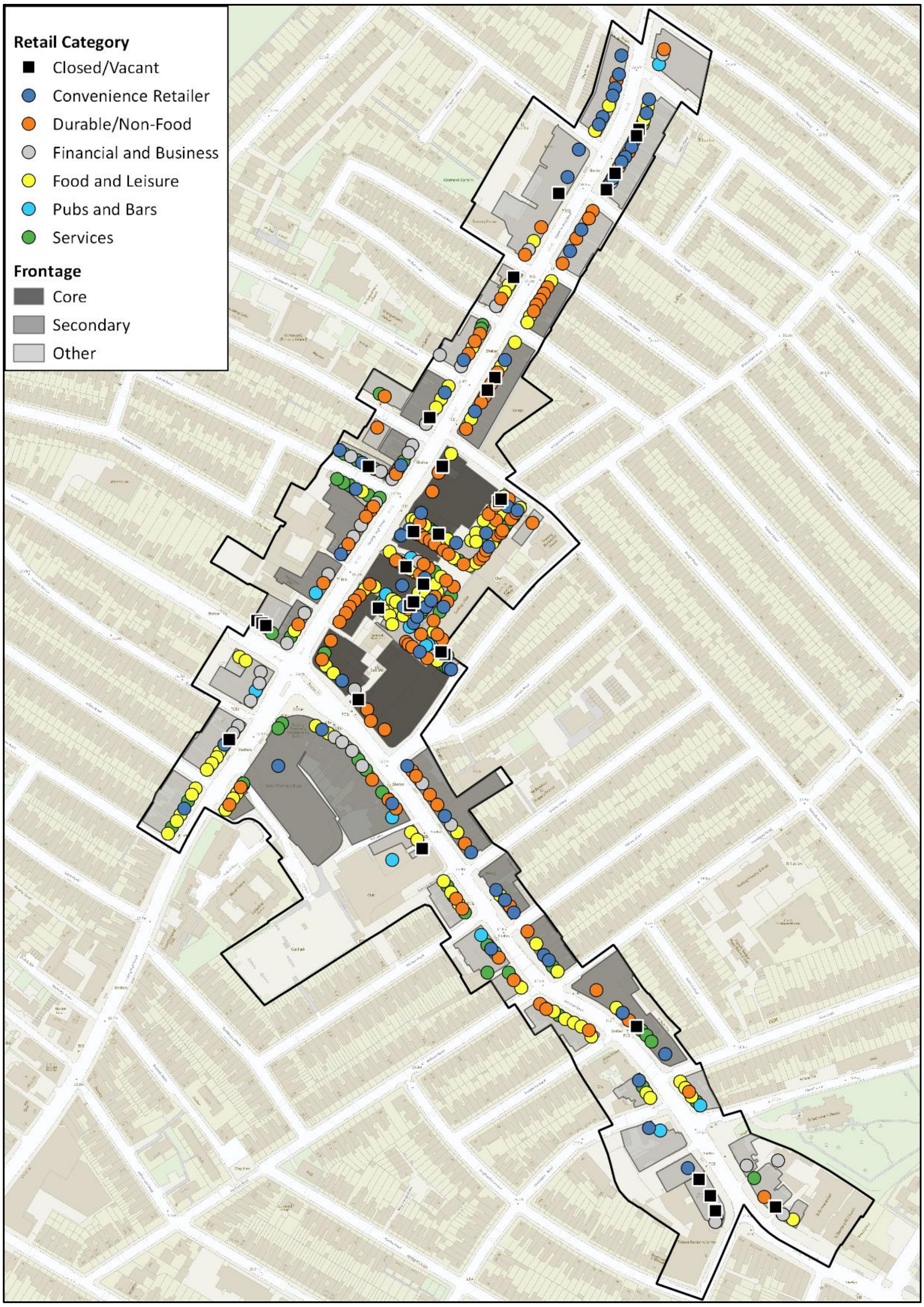
Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	18%	40%	9%	15%	1%	13%	4%
Secondary	18%	14%	12%	23%	3%	26%	3%
Other	6%	11%	22%	25%	5%	24%	8%
Total	**13%**	**19%**	**15%**	**22%**	**3%**	**22%**	**5%**

Percentage of trading units by retail category and frontage - Putney Town Centre



27. Tooting Town Centre – Headline Results

The vacancy rate in Tooting Town Centre has reduced from 8% in 2021 to 7% in 2022. The combined vacancy rate (all frontages) has remained consistently low since 2004 - generally between 3-7%. Vacant units on Core frontages remain unchanged and there was an increase of two units in Secondary frontages. The total number of units in Other frontages was higher than previously recorded as Tooting Market was not surveyed in 2020 and both Tooting Market and Broadway Market were not surveyed in 2021. Therefore, while the number of vacant units in Other frontages has increased from 21 in 2021 to 27 in 2022, the vacancy rate for Other frontages has actually decreased from 12% in 2021 to 9% in 2022.



28. Tooting Town Centre – Vacancies by Frontage

- There were 33 vacancies in Tooting Town Centre in 2022. 15 of 33 vacant units are newly vacant while 7 of the vacant units 2021 remain unoccupied. The other 11 vacant units (all in either Tooting Market or Broadway Market) were not surveyed in 2021.
- 4 Financial and Business units were newly vacant in 2022 which includes 2 estate agents, a betting shop and bureau de change.
- The 2022 survey was the first to record the 14 units within the 'Yard Market' extension to Tooting Market that opened in 2018.
- Most vacant units were on Upper Tooting Road. In Tooting Market there were 4 vacant units and in Broadway Market there were 7 vacant units.

Table 32. Vacant Units by year (All designated frontages) - Tooting Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020*	2021*	2022	Average
Total Units	399	407	410	408	432	430	450	448	403	309	444	413
Vacant Units	17	14	27	22	21	32	26	38	42	24	33	27
Vacancy Rate	4%	3%	7%	5%	5%	7%	6%	8%	10%	8%	7%	7%

**Tooting Market was not surveyed in 2020. Tooting Market and Broadway Market were not surveyed in 2021.*

Vacant Units by year (All designated frontages) - Tooting Town Centre

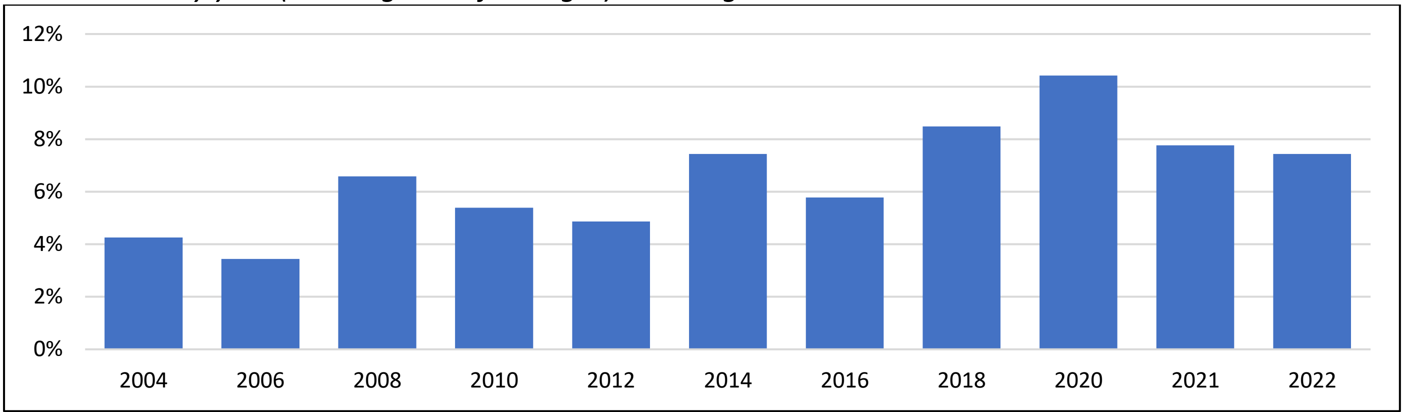


Table 33. Vacant Units by year (Core frontages) - Tooting Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	29	28	29	27	27	28	27	26	27	26	26	27
Vacant Units	0	0	2	2	1	1	1	1	1	1	2	1
Vacancy Rate	0%	0%	7%	7%	4%	4%	4%	4%	4%	4%	8%	4%

Table 34. Vacant Units by year (Secondary frontages) - Tooting Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	104	103	103	113	113	111	114	111	113	110	110	110
Vacant Units	5	5	7	4	6	5	6	6	7	2	4	5
Vacancy Rate	5%	5%	7%	4%	5%	5%	5%	5%	6%	2%	4%	5%

Table 35. Vacant Units by year (Other frontages) - Tooting Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020*	2021*	2022	Average
Total Units	266	276	278	268	292	291	309	311	263	173	308	276
Vacant Units	12	9	18	16	14	26	19	31	34	21	27	21
Vacancy Rate	5%	3%	6%	6%	5%	9%	6%	10%	13%	12%	9%	7%

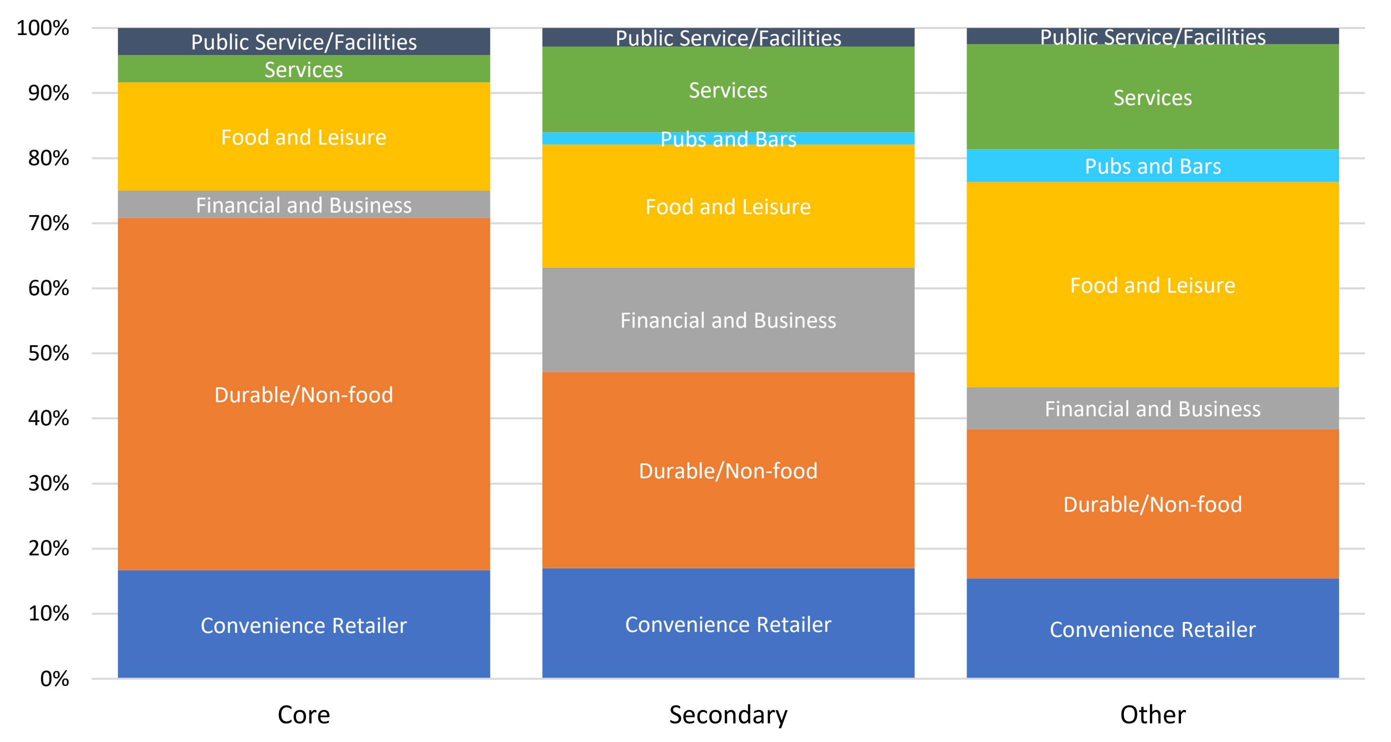
**Tooting Market was not surveyed in 2020. Tooting Market and Broadway Market were not surveyed in 2021.*

29. Tooting Town Centre – Retail Categories

Table 36. Percentage of trading units by retail category and frontage - Tooting Town Centre

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	17%	54%	4%	17%	0%	4%	4%
Secondary	17%	30%	16%	19%	2%	13%	3%
Other	15%	23%	6%	32%	5%	16%	3%
Total	**16%**	**27%**	**9%**	**27%**	**4%**	**15%**	**3%**

Percentage of trading units by retail category and frontage - Tooting Town Centre



30. Wandsworth Town Centre – Headline Results

The combined vacancy rate in Core and Other frontages in Wandsworth Town Centre has increased to 23%, compared to the 17% recorded in 2020. There were 35 units recorded as vacant or closed in 2022, which is 10 more than in 2021. Units in the Core Frontage saw an increase from 11% to 12%, but Other frontages saw an increase from 21% in 2021 to 32% in 2022. In Southside Shopping Centre, 16 units were recorded as vacant/closed (45.7% of the total closed/vacant units in Wandsworth Town Centre), including 11 units internal units and 5 units external units along Garratt Lane.

The protected frontages in Wandsworth Town Centre consist of Core Shopping frontages and protected Other frontages only; there are no Secondary frontages designated within Wandsworth Town Centre. Apart from Sainsbury's in Garratt Lane, all the Core Shopping frontages are entirely within the indoor Southside shopping centre. Regeneration over recent years has reconfigured the shopping centre and the units within it therefore it is not possible to make a direct comparison with previous years' survey results and vacancy rates in the recent past have reflected the complete remodelling of the interior. This is reflected in the total number of units in the protected frontages which has reduced markedly in recent years from 170 units in 2012, to 143 in 2016, with 149 units recorded in 2022 following newly created or subdivided units.

31. Wandsworth Town Centre – Vacancies by Frontage

- There were 35 vacancies in Wandsworth Town Centre of which 21 were recorded as vacant in 2021 and 14 were newly vacant.
- Of the newly vacant units, 6 were Food and Leisure units.
- Notable closures include HSBC, Body Shop, Costa, and 2 hairdressers.
- Of the 25 units recorded as vacant in 2021, 4 units had been occupied in 2022 including an Amazon Fresh convenience store and the reopening of the Spread Eagle pub.

Table 37. Vacant Units by year (All designated frontages) - Wandsworth Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	177	178	177	169	170	144	143	149	151	150	149	160
Vacant Units	28	27	52	43	47	13	13	14	23	25	35	29
Vacancy Rate	16%	15%	29%	25%	28%	9%	9%	9%	15%	17%	23%	18%

Vacant Units by year (All designated frontages) - Wandsworth Town Centre

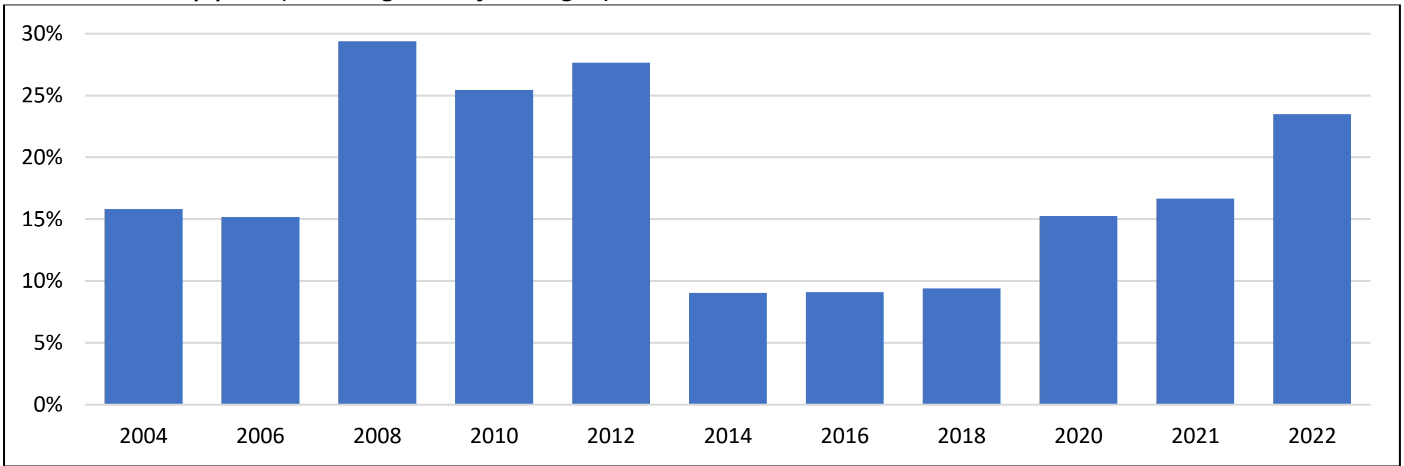


Table 38. Vacant Units by year (Core frontages) - Wandsworth Town Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	49	52	50	86	87	63	65	65	65	64	65	65
Vacant Units	5	3	6	23	28	5	5	3	9	7	8	9
Vacancy Rate	10%	6%	12%	27%	32%	8%	8%	5%	14%	11%	12%	14%

Table 39. Vacant Units by year (Other frontages) - Wandsworth Town Centre

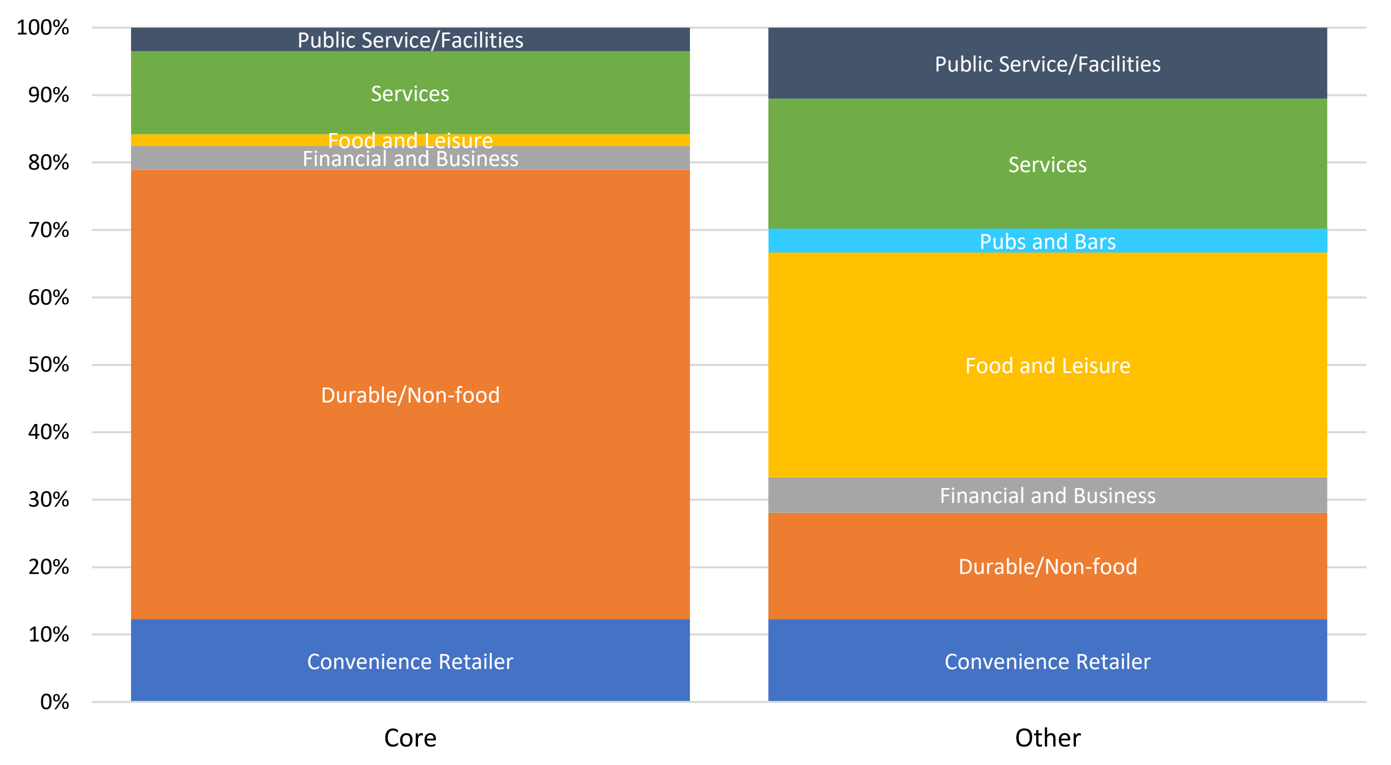
	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	106	105	105	83	83	81	78	84	86	86	84	89
Vacant Units	14	17	36	20	19	8	8	11	14	18	27	17
Vacancy Rate	13%	16%	34%	24%	23%	10%	10%	13%	16%	21%	32%	20%

32. Wandsworth Town Centre – Retail Categories

Table 40. Percentage of trading units by retail category and frontage - Wandsworth Town Centre

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	12%	67%	4%	2%	0%	12%	4%
Other	12%	16%	5%	33%	4%	19%	11%
Total	**12%**	**41%**	**4%**	**18%**	**2%**	**16%**	**7%**

Percentage of trading units by retail category and frontage - Wandsworth Town Centre



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33. Local Centres – Headline Results

The vacancy rate in all Local Centres has increased slightly between 2021 and 2022 from 14% to 15%. The vacancy rate has remained at consistent levels with increases in Core, Secondary and Other frontages. Vacancies have been above average for the last four surveys.

**Roehampton Local Centre was not surveyed in 2020.*

34. Local Centres – Vacancies by Frontage

Table 41. Vacant Units by year (All designated frontages) - Local Centres

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	559	559	555	562	553	546	561	562	528	558	558	556
Vacant Units	49	52	61	58	62	59	43	70	68	76	84	62
Vacancy Rate	9%	9%	11%	10%	11%	11%	8%	12%	13%	14%	15%	11%

Vacant Units by year (All designated frontages) - Local Centres

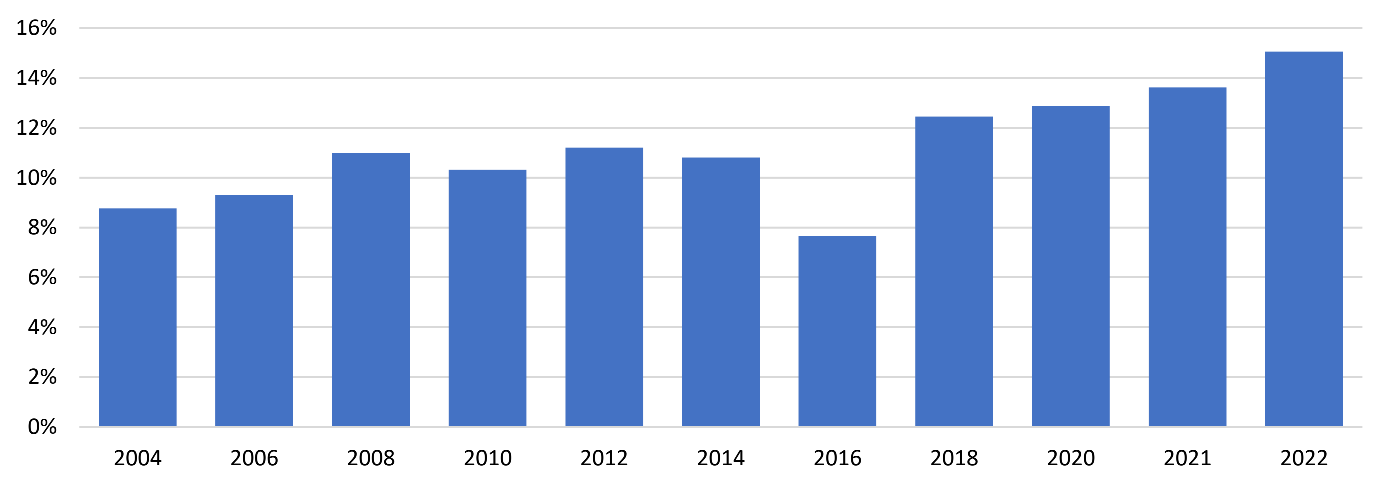


Table 42. Vacant Units by year (Core frontages) - Local Centres

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	126	128	126	126	125	104	105	104	99	103	103	115
Vacant Units	9	10	9	12	13	11	5	12	11	15	17	12
Vacancy Rate	7%	8%	7%	10%	10%	11%	5%	12%	11%	15%	17%	10%

Table 43. Vacant Units by year (Secondary frontages) - Local Centres

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	137	136	136	142	141	159	163	163	153	161	161	149
Vacant Units	13	17	18	14	16	19	10	21	25	22	24	18
Vacancy Rate	9%	13%	13%	10%	11%	12%	6%	13%	16%	14%	15%	12%

Table 44. Vacant Units by year (Other frontages) - Local Centres

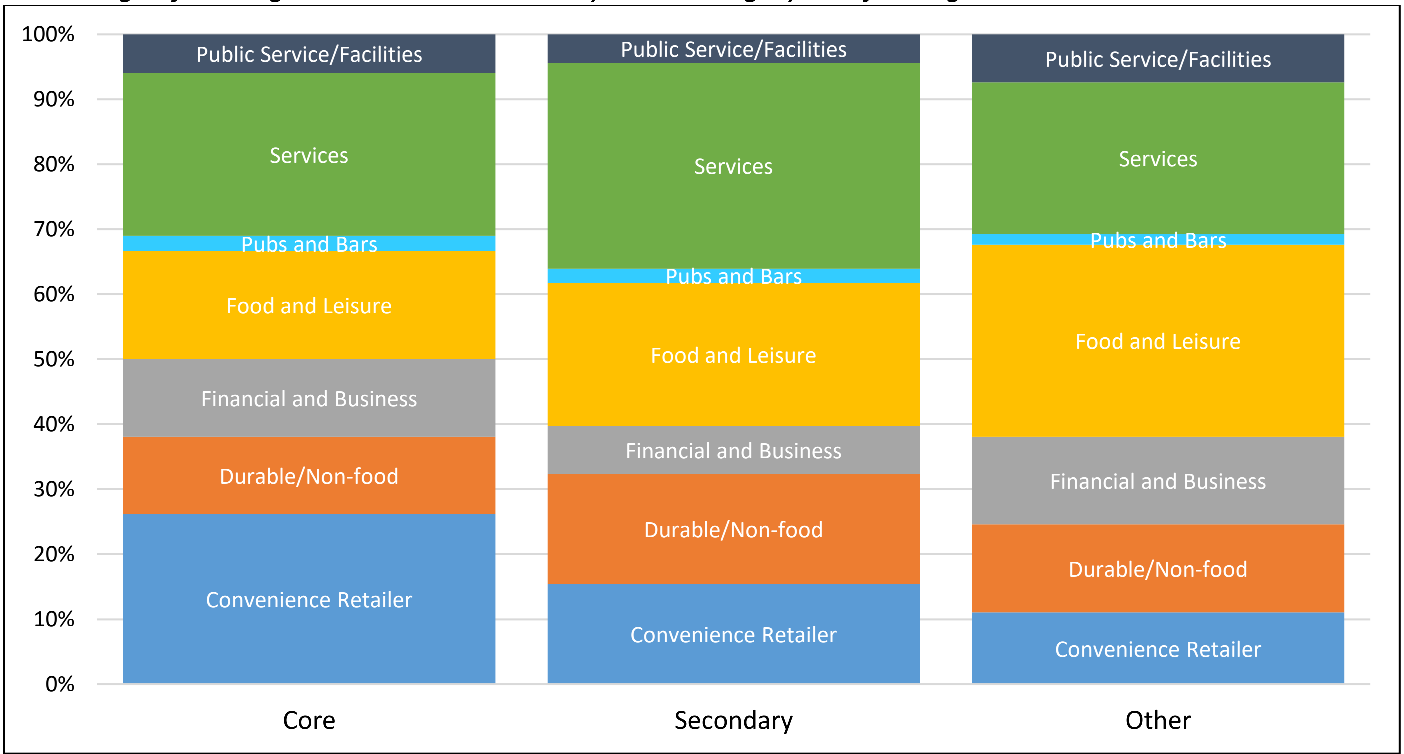
	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	296	295	293	294	287	283	293	295	276	294	294	291
Vacant Units	27	25	34	32	33	29	28	37	32	39	43	33
Vacancy Rate	9%	8%	12%	11%	11%	10%	10%	13%	12%	13%	15%	11%

35. Local Centres – Retail Categories by Frontage

Table 45. Percentage of trading units in Local Centres by retail category and frontage

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	26%	12%	12%	17%	2%	25%	6%
Secondary	15%	17%	7%	22%	2%	32%	4%
Other	11%	14%	14%	30%	2%	23%	7%
Total	**15%**	**14%**	**11%**	**25%**	**2%**	**26%**	**6%**

Percentage of trading units in Local Centres by retail category and frontage

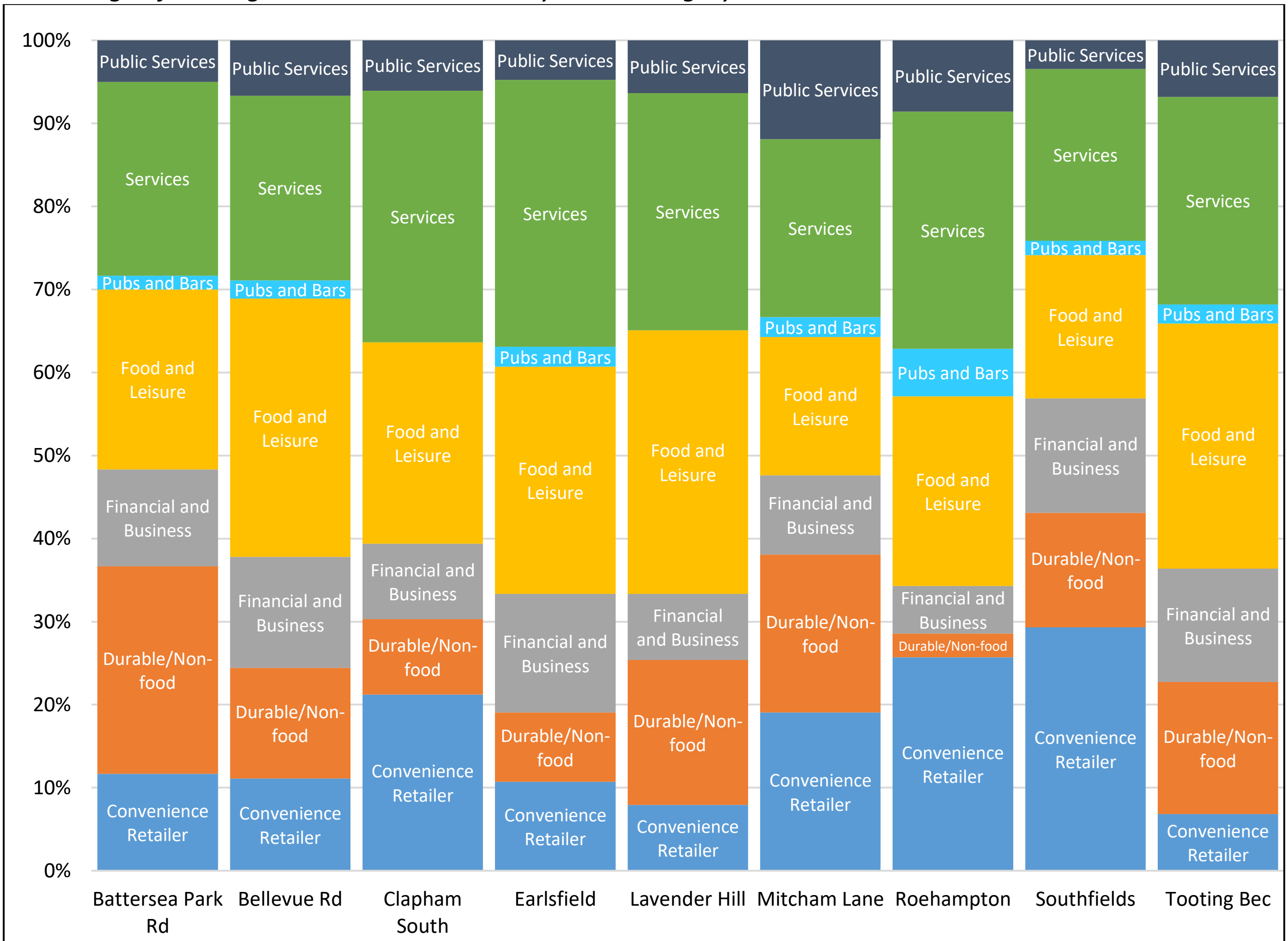


36. Local Centres – Retail Categories by Centre

Table 46. Percentage of trading units in Local Centres by retail category

Local Centre	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Services
Battersea Park Rd	12%	25%	12%	22%	2%	23%	5%
Bellevue Rd	11%	13%	13%	31%	2%	22%	7%
Clapham South	21%	9%	9%	24%	0%	30%	6%
Earlsfield	11%	8%	14%	27%	2%	32%	5%
Lavender Hill	8%	17%	8%	32%	0%	29%	6%
Mitcham Lane	19%	19%	10%	17%	2%	21%	12%
Roehampton	26%	3%	6%	23%	6%	29%	9%
Southfields	29%	14%	14%	17%	2%	21%	3%
Tooting Bec	7%	16%	14%	30%	2%	25%	7%
Total	15%	14%	11%	25%	2%	26%	6%

Percentage of trading units in Local Centres by retail category



37. Local Centres - change in Retail Categories between 2021 - 2022

Due to the lower number of retail units in each local centre, the change in the types of businesses may be affected by only one or two units changing. For example, in Mitcham Lane out of 12 Service retailers in 2021, 3 became vacant, and 1 changed use category resulting in an 4.7% decrease. Similarly in Tooting Bec, the change of use of 2 units to an accountants and estate agents results in a 4.3% increase in Financial and Business units.

Table 47. Change in Percentage of trading units in Local Centres by retail category – 2022 compared to 2021

Local Centre	**Convenience Retailer**	**Durable/ Non-food**	**Financial and Business**	**Food and Leisure**	**Pubs and Bars**	**Services**	**Public Service/ Facilities**
Battersea Park Rd	0.2%	2.0%	-1.4%	-1.3%	0.0%	0.4%	0.1%
Bellevue Rd	-0.5%	-0.6%	-0.6%	3.2%	-0.1%	-1.0%	-0.3%
Clapham South	0.0%	0.0%	0.0%	0.0%	0.0%	-3.0%	3.0%
Earlsfield	0.1%	0.1%	-1.0%	-2.0%	0.0%	2.7%	0.1%
Lavender Hill	-0.1%	-1.9%	-0.1%	-2.1%	0.0%	2.8%	1.5%
Mitcham Lane	-0.5%	3.8%	-3.5%	3.6%	0.2%	-4.7%	1.0%
Roehampton	0.0%	0.0%	0.0%	-2.9%	0.0%	0.0%	2.9%
Southfields	-0.8%	-0.5%	1.1%	-0.2%	0.1%	0.1%	0.3%
Tooting Bec	-0.2%	-0.4%	4.3%	-0.7%	-0.1%	-2.9%	-0.2%
Total	-0.4%	0.2%	-0.3%	-0.3%	0.0%	0.0%	0.7%

38. Battersea Park Road Local Centre

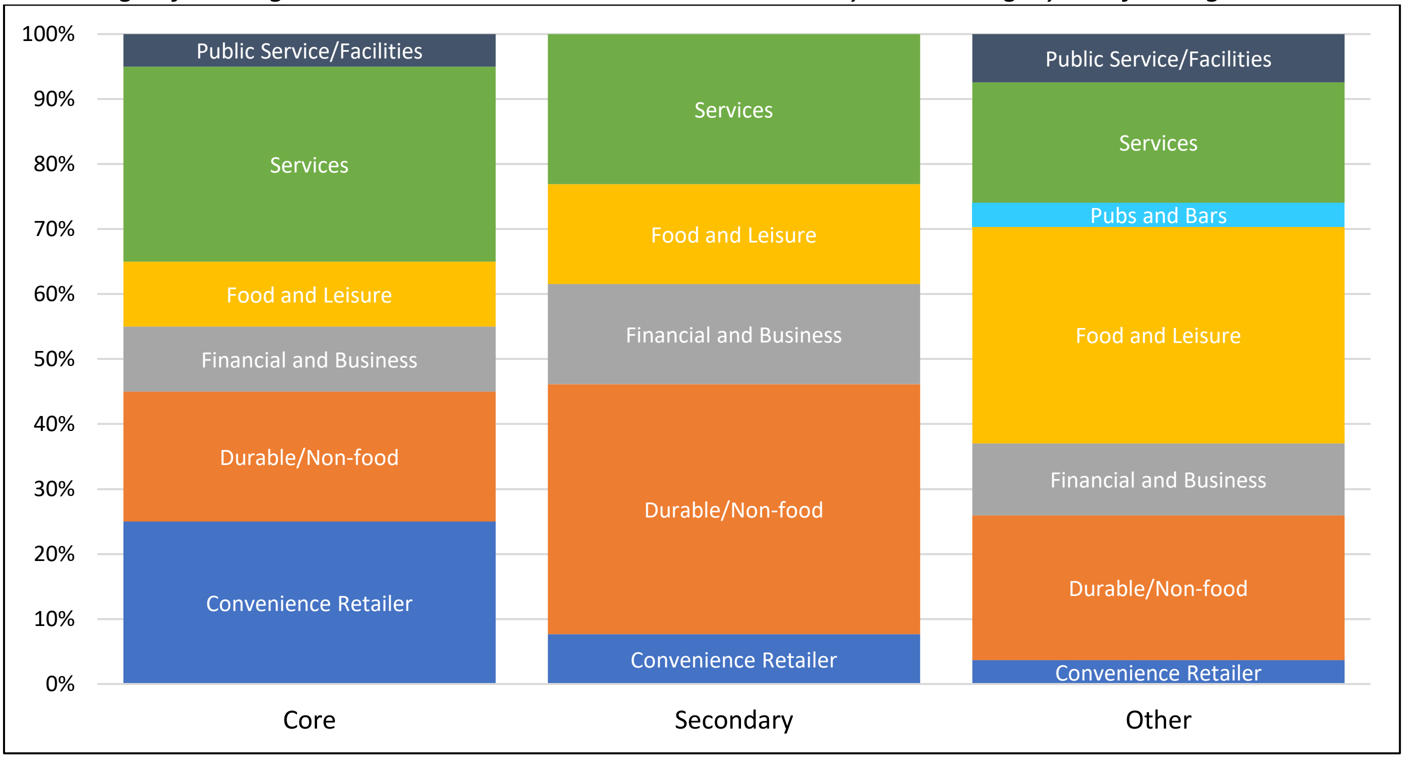
Table 48. Vacant Units by year (All designated frontages) - Battersea Park Road Local Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	70	68	68	68	67	64	67	67	68	68	68	68
Vacant Units	5	6	10	8	8	4	4	3	6	4	5	6
Vacancy Rate	7%	9%	15%	12%	12%	6%	6%	4%	9%	6%	7%	8%

Table 49. Percentage of trading units in Battersea Park Road Local Centre by retail category and frontage

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	25%	20%	10%	10%	0%	30%	5%
Secondary	8%	38%	15%	15%	0%	23%	0%
Other	4%	22%	11%	33%	4%	19%	7%
Total	**12%**	**25%**	**12%**	**22%**	**2%**	**23%**	**5%**

Percentage of trading units in Battersea Park Road Local Centre by retail category and frontage



39. Bellevue Road Local Centre

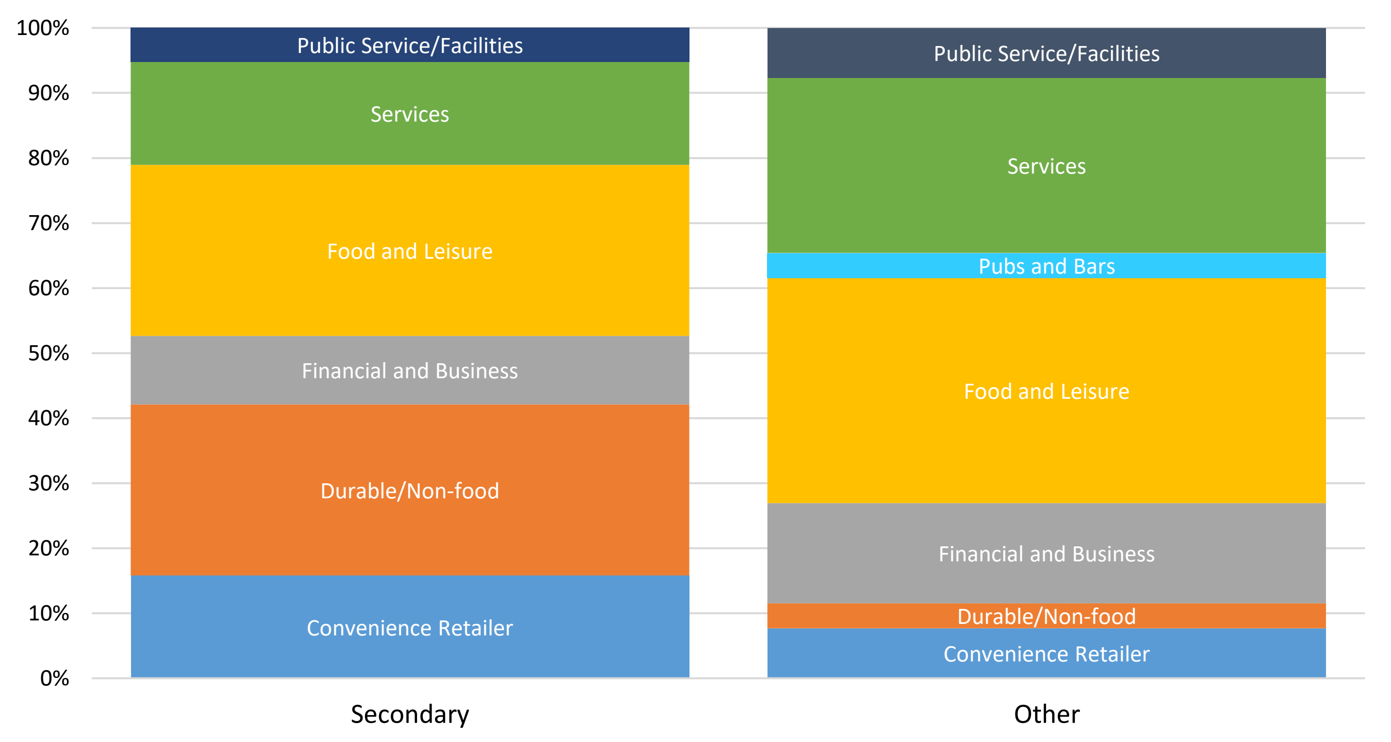
Table 50. Vacant Units by year (All designated frontages) - Bellevue Road Local Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	49	50	50	51	49	47	48	48	48	48	48	49
Vacant Units	2	3	1	2	5	3	1	4	6	2	0	3
Vacancy Rate	4%	6%	2%	4%	10%	6%	2%	8%	13%	4%	0%	5%

Table 51. Percentage of trading units in Bellevue Road Local Centre by retail category and frontage

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Secondary	16%	26%	11%	26%	0%	16%	5%
Other	8%	4%	15%	35%	4%	27%	8%
Total	**11%**	**13%**	**13%**	**31%**	**2%**	**22%**	**7%**

Percentage of trading units in Bellevue Road Local Centre by retail category and frontage



40. Clapham South Local Centre

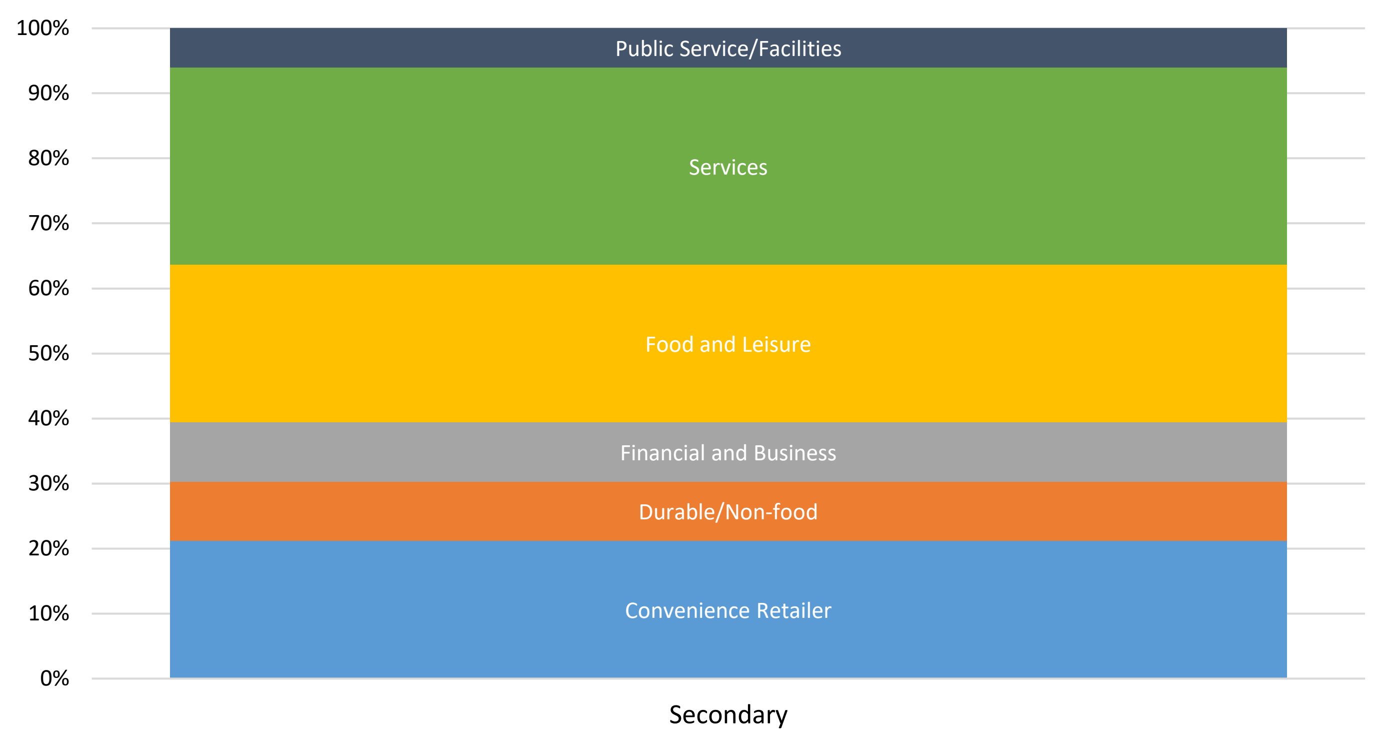
Table 52. Vacant Units by year (All designated frontages) - Clapham South Local Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	32	31	31	36	35	35	36	37	37	36	36	35
Vacant Units	2	2	2	5	3	2	1	4	6	3	3	3
Vacancy Rate	6%	6%	6%	14%	9%	6%	3%	11%	16%	8%	8%	9%

Table 53.Percentage of trading units in Clapham South Local Centre by retail category and frontage

Frontage	Convenience Retailer	Durable/Non-food	Financial and Business	Food and Leisure	Services	Public Service/ Facilities
Secondary	21%	9%	9%	24%	30%	6%
Total	**21%**	**9%**	**9%**	**24%**	**30%**	**6%**

Percentage of trading units in Clapham South Local Centre by retail category and frontage



41. Earlsfield Local Centre

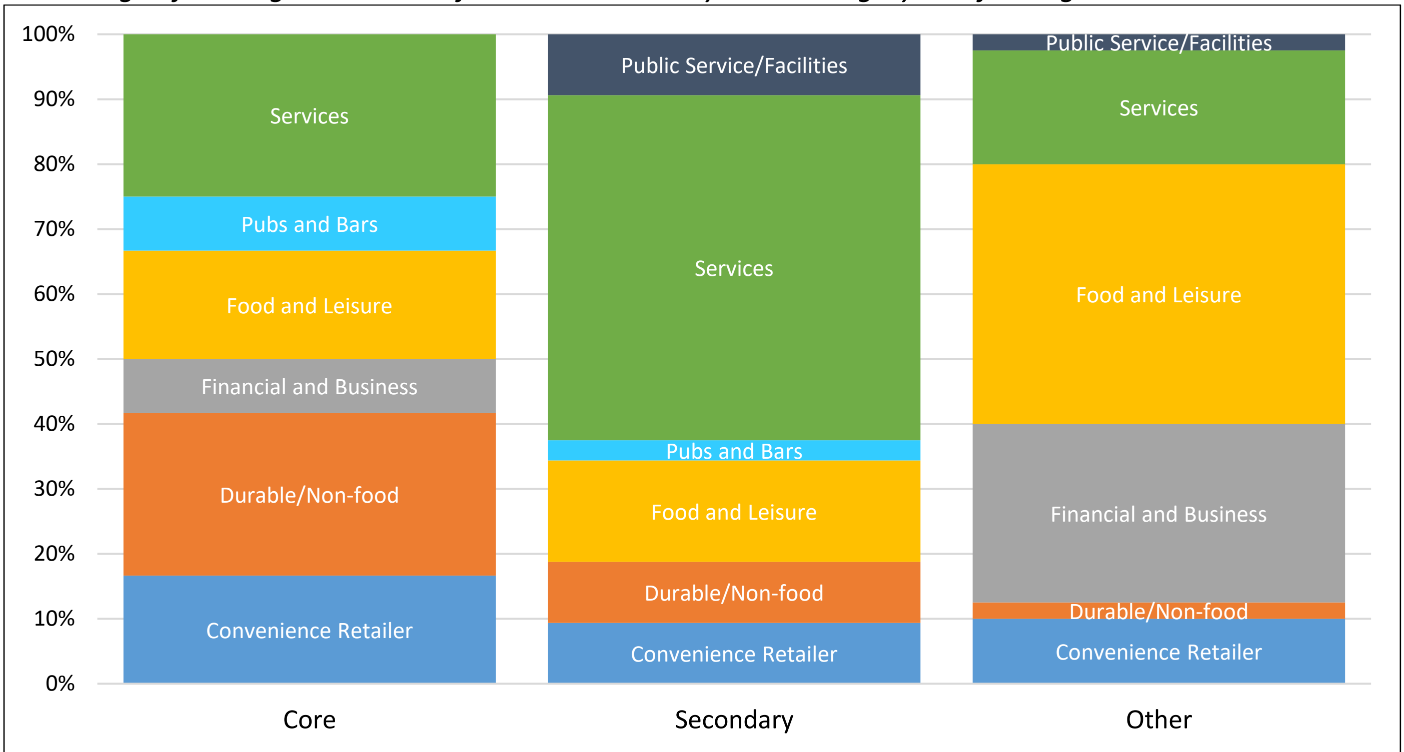
Table 54. Vacant Units by year (All designated frontages) - Earlsfield Local Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	95	93	91	92	92	93	95	94	94	93	93	93
Vacant Units	4	6	3	3	4	2	6	6	6	8	9	5
Vacancy Rate	4%	6%	3%	3%	4%	2%	6%	6%	6%	9%	10%	6%

Table 55.Percentage of trading units in Earlsfield Local Centre by retail category and frontage

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	17%	25%	8%	17%	8%	25%	0%
Secondary	9%	9%	0%	16%	3%	53%	9%
Other	10%	3%	28%	40%	0%	18%	3%
Total	**11%**	**8%**	**14%**	**27%**	**2%**	**32%**	**5%**

Percentage of trading units in Earlsfield Local Centre by retail category and frontage



42. Lavender Hill/Queenstown Road Local Centre

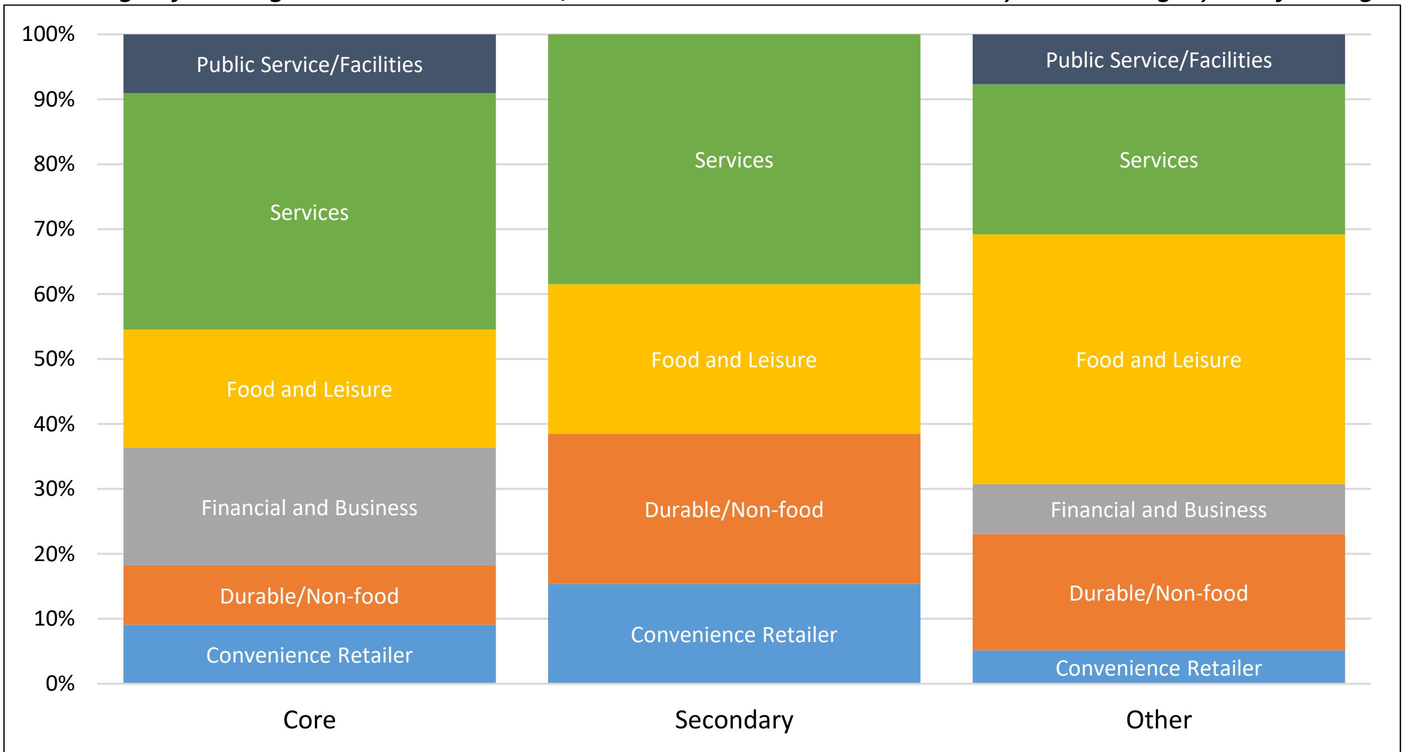
Table 56. Vacant Units by year (All designated frontages) - Lavender Hill/Queenstown Road Local Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	72	73	73	73	73	72	74	74	74	74	75	73
Vacant Units	17	10	13	11	13	20	11	20	6	12	12	13
Vacancy Rate	24%	14%	18%	15%	18%	28%	15%	27%	8%	16%	16%	18%

Table 57. Percentage of trading units in Lavender Hill/Queenstown Road Local Centre by retail category and frontage

Frontage	Convenience Retailer	Durable/Non-food	Financial and Business	Food and Leisure	Services	Public Service/ Facilities
Core	9%	9%	18%	18%	36%	9%
Secondary	15%	23%	0%	23%	38%	0%
Other	5%	18%	8%	38%	23%	8%
Total	**8%**	**17%**	**8%**	**32%**	**29%**	**6%**

Percentage of trading units in Lavender Hill/Queenstown Road Local Centre by retail category and frontage



43. Mitcham Lane Local Centre

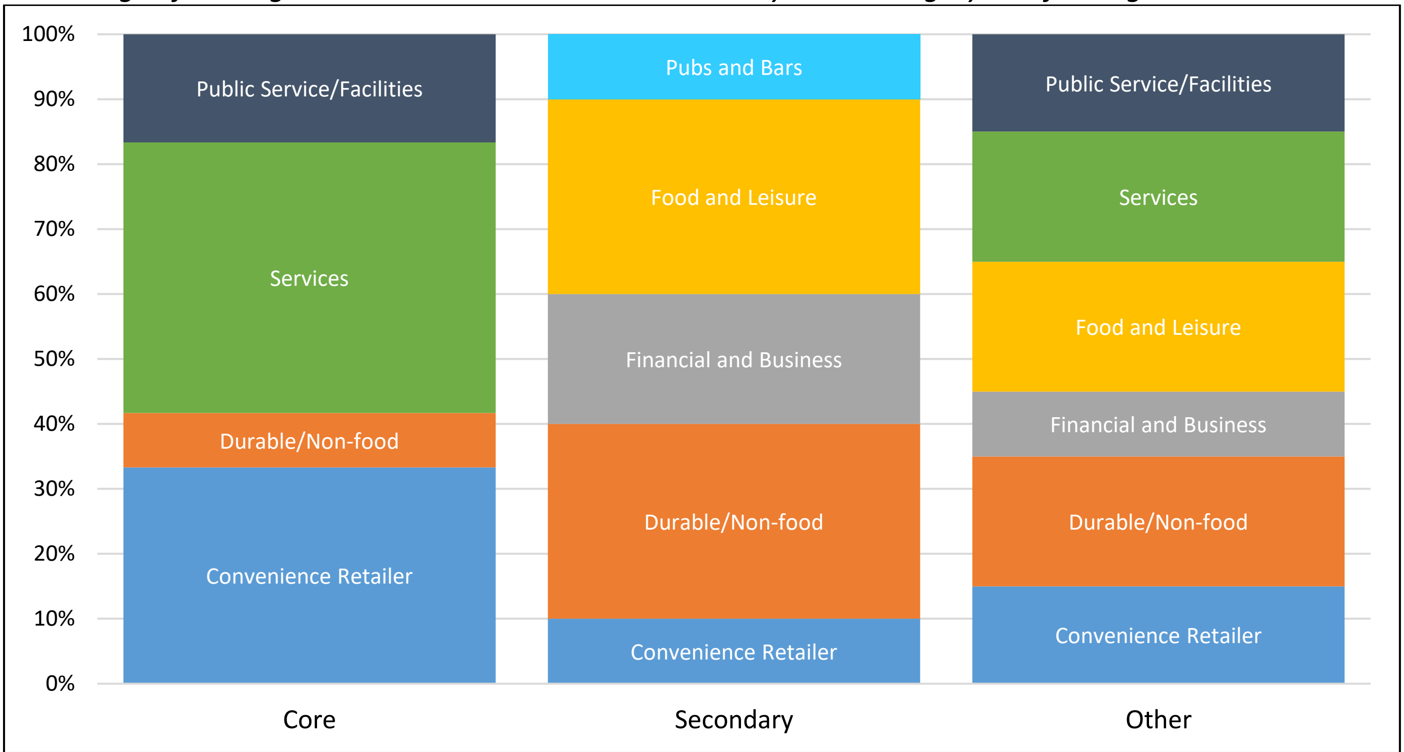
Table 58. Vacant Units by year (All designated frontages) - Mitcham Lane Local Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	61	62	63	63	62	63	65	65	65	65	65	64
Vacant Units	7	10	13	10	9	18	8	14	16	17	22	13
Vacancy Rate	11%	16%	21%	16%	15%	29%	12%	22%	25%	26%	34%	21%

Table 59. Percentage of trading units in Mitcham Lane Local Centre by retail category and frontage

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	33%	8%	0%	0%	0%	42%	17%
Secondary	10%	30%	20%	30%	10%	0%	0%
Other	15%	20%	10%	20%	0%	20%	15%
Total	**19%**	**19%**	**10%**	**17%**	**2%**	**21%**	**12%**

Percentage of trading units in Mitcham Lane Local Centre by retail category and frontage



44. Roehampton Local Centre

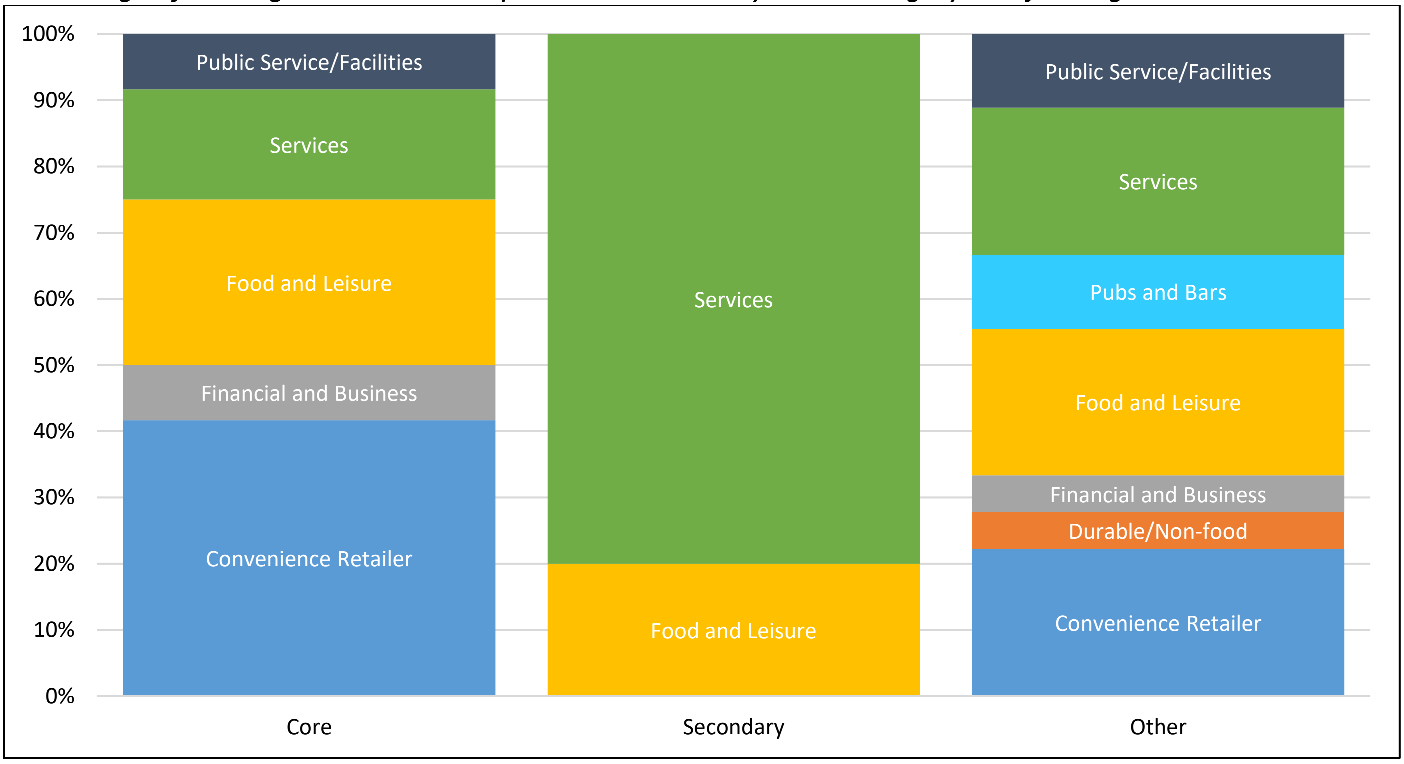
Table 60. Vacant Units by year (All designated frontages) - Roehampton Local Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	51	52	49	49	49	48	49	50	Not surveyed	47	47	49
Vacant Units	3	7	9	8	8	4	5	6		10	10	7
Vacancy Rate	6%	13%	18%	16%	16%	8%	10%	12%		21%	21%	14%

Table 61. Percentage of trading units in Roehampton Local Centre by retail category and frontage

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	42%	0%	8%	25%	0%	17%	8%
Secondary	0%	0%	0%	20%	0%	80%	0%
Other	22%	6%	6%	22%	11%	22%	11%
Total	**26%**	**3%**	**6%**	**23%**	**6%**	**29%**	**9%**

Percentage of trading units in Roehampton Local Centre by retail category and frontage



45. Southfields Local Centre

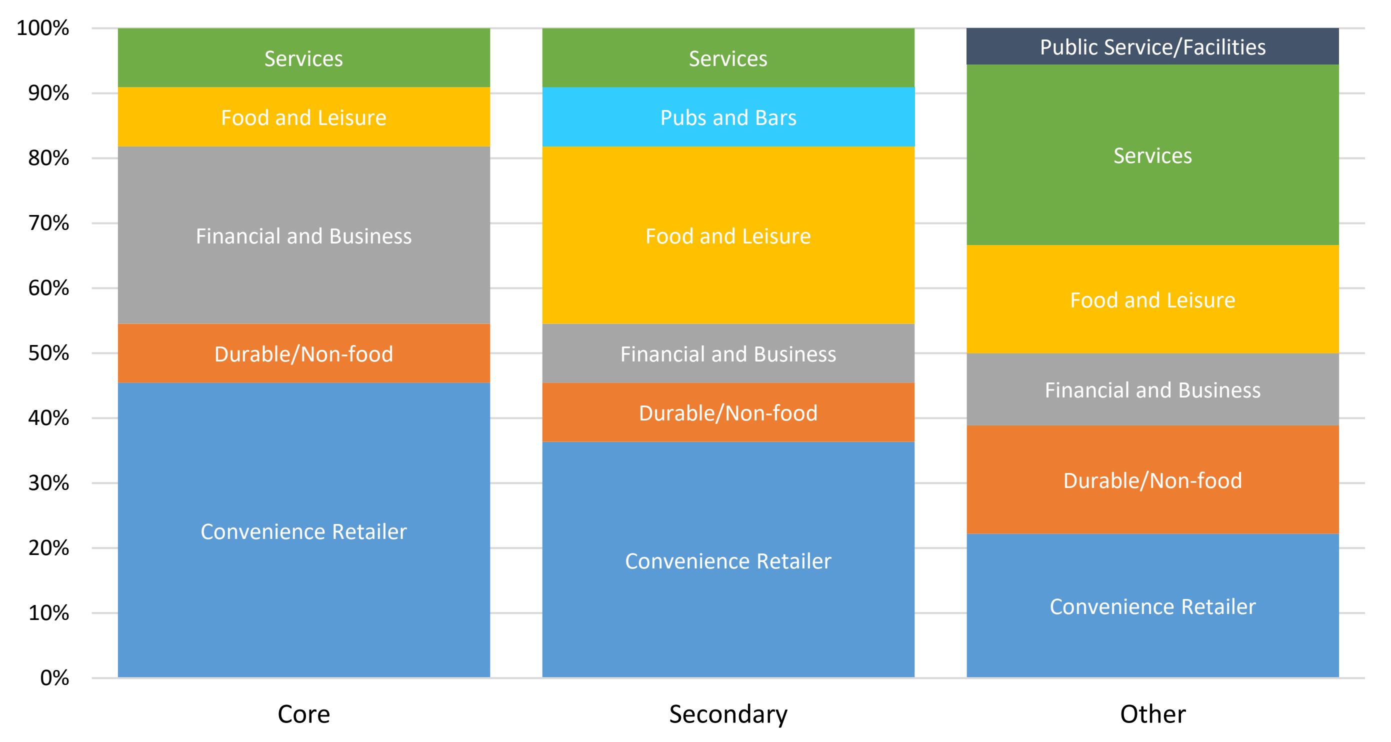
Table 62. Vacant Units by year (All designated frontages) - Southfields Local Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	75	75	75	75	71	69	71	70	70	71	71	72
Vacant Units	5	3	4	5	8	3	3	5	9	7	12	6
Vacancy Rate	7%	4%	5%	7%	11%	4%	4%	7%	13%	10%	17%	8%

Table 63. Percentage of trading units in Southfields Local Centre by retail category and frontage

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	45%	9%	27%	9%	0%	9%	0%
Secondary	36%	9%	9%	27%	9%	9%	0%
Other	22%	17%	11%	17%	0%	28%	6%
Total	**29%**	**14%**	**14%**	**17%**	**2%**	**21%**	**3%**

Percentage of trading units in Southfields Local Centre by retail category and frontage



46. Tooting Bec Local Centre

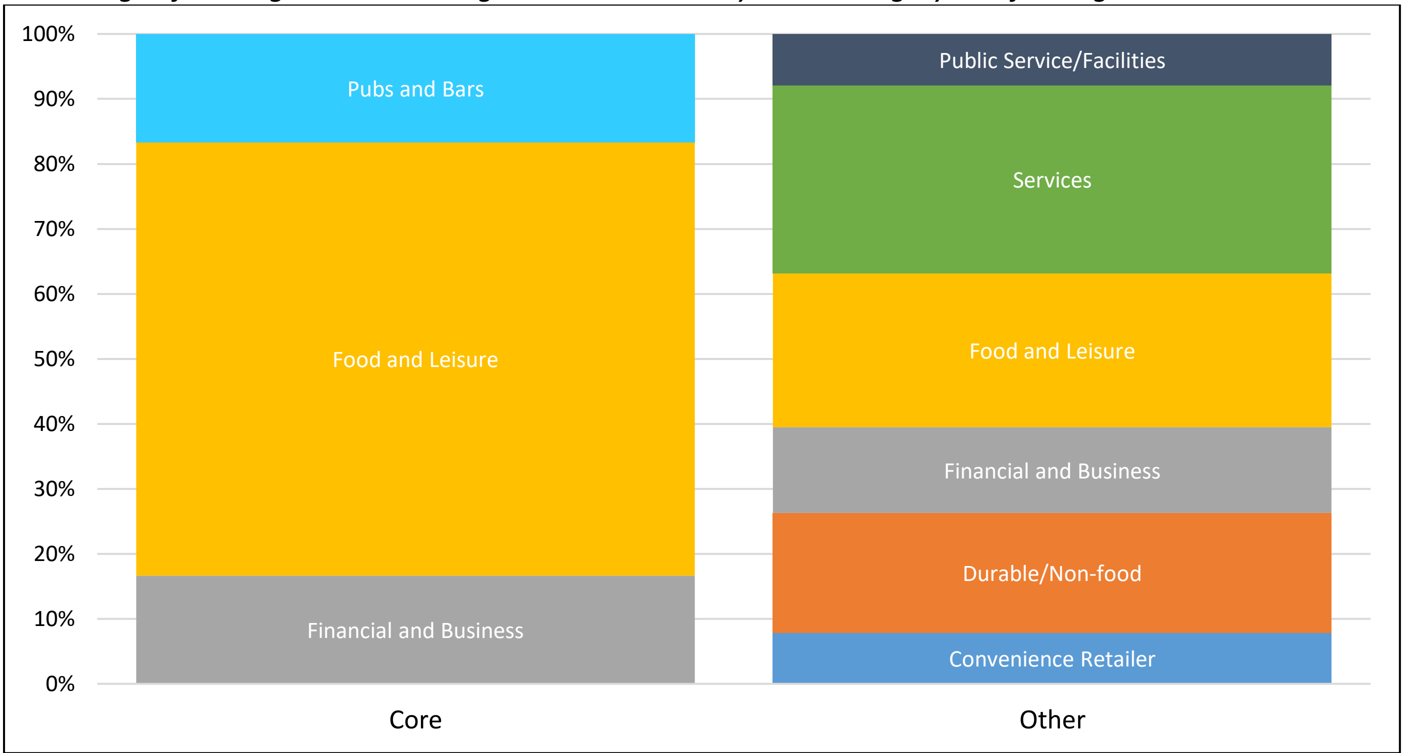
Table 64. Vacant Units by year (All designated frontages) - Tooting Bec Local Centre

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	54	55	55	55	55	55	56	56	56	56	55	55
Vacant Units	4	5	6	6	5	3	4	7	12	13	11	7
Vacancy Rate	7%	9%	11%	11%	9%	5%	7%	13%	21%	23%	20%	13%

Table 65. Percentage of trading units in Tooting Bec Local Centre by retail category and frontage

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	0%	0%	17%	67%	17%	0%	0%
Other	8%	18%	13%	24%	0%	29%	8%
Total	**7%**	**16%**	**14%**	**30%**	**2%**	**25%**	**7%**

Percentage of trading units in Tooting Bec Local Centre by retail category and frontage



47. Important Local Parades - Vacant Units by year

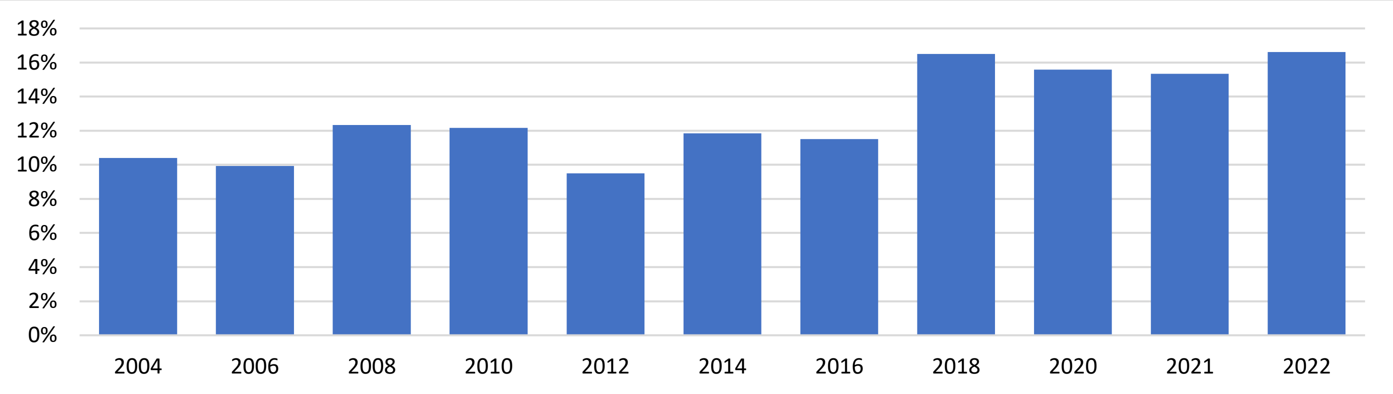
The vacancy rate in the Important Local Parades has increased slightly from 15% in 2021 to 17% in 2022.

Table 66. Vacant Units by year in All Retail Frontages in the Important Local Parades

	2004	2006	2008	2010	2012	2014	2016	2018	2020*	2021	2022	Average
Total Units	346	342	308	304	305	321	304	303	186	300	301	302
Vacant Units	36	34	38	37	29	38	35	50	29	46	50	38
Vacancy Rate	10%	10%	12%	12%	10%	12%	12%	17%	16%	15%	17%	13%

**Around a third of Local Parades were not surveyed in 2020*

Vacancy rate by year in All Retail Frontages in the Important Local Parades

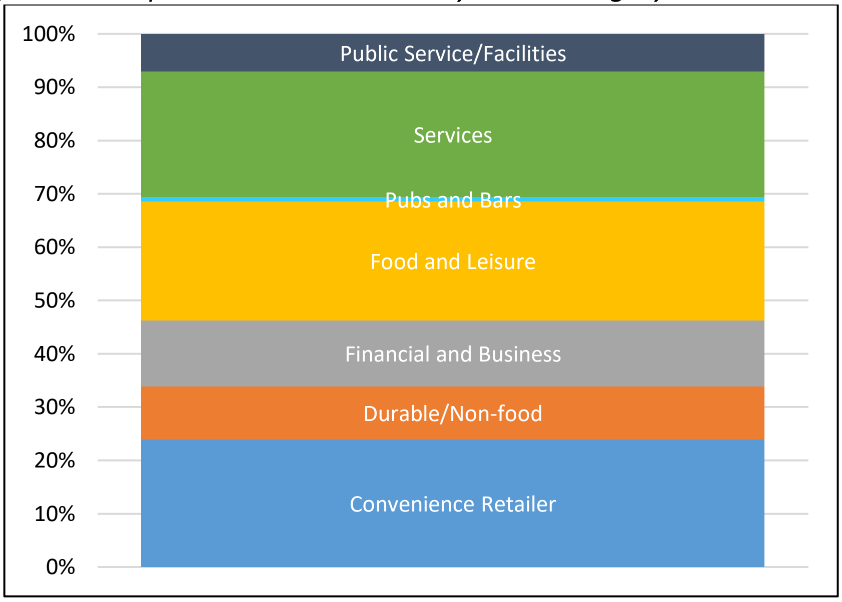


48. Important Local Parades – Retail Categories

Table 67. Percentage of trading units in the Important Local Parades by retail category

Convenience Retailer	Durable/Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
24%	**10%**	**12%**	**22%**	**1%**	**24%**	**7%**

Percentage of trading units in Important Local Parades by retail category



Important Local Parades

Vacant Units by year

ILP 1
152-168 Battersea Bridge Road

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	6	6	6	6	6	6	6	6	6	7	7	6
Vacant Units	0	0	0	0	0	0	0	1	2	2	1	1
Vacancy Rate	0%	0%	0%	0%	0%	0%	0%	17%	33%	29%	14%	9%

ILP 2
141-185 Battersea High Street

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	19	19	19	19	19	19	19	19	19	19	19	19
Vacant Units	5	5	5	3	3	4	1	4	5	9	7	5
Vacancy Rate	26%	26%	26%	16%	16%	21%	5%	21%	26%	47%	37%	24%

ILP 3
275-305 Battersea Park Road

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	14	14	13	13	13	13	14	14	14	14	14	14
Vacant Units	2	1	3	2	2	7	2	5	3	2	4	3
Vacancy Rate	14%	7%	23%	15%	15%	54%	14%	36%	21%	14%	29%	22%

ILP 4
129-139 Beaumont Road

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	7	7	7	7	7	7	7	7	7	1	2	6
Vacant Units	0	1	0	1	2	2	7	7	7	0	1	3
Vacancy Rate	0%	14%	0%	14%	29%	29%	100%	100%	100%	0%	50%	42%

ILP 5
2-14 Blandfield Road/55-61 & 81-95 Nightingale Lane

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	19	19	18	18	18	18	18	18	18	18	18	18
Vacant Units	5	3	4	7	3	1	3	3	4	2	1	3
Vacancy Rate	26%	16%	22%	39%	17%	6%	17%	17%	22%	11%	6%	18%

ILP 6
47-67 East Hill

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	10	10	10	10	10	10	10	10	10	10	10	10
Vacant Units	1	0	0	1	1	0	0	2	2	1	2	1
Vacancy Rate	10%	0%	0%	10%	10%	0%	0%	20%	20%	10%	20%	9%

ILP 7

135-153 Franciscan Road

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	9	9	9	9	9	9	9	9	9	9	9	9
Vacant Units	0	0	1	1	0	1	0	0	0	0	0	0
Vacancy Rate	0%	0%	11%	11%	0%	11%	0%	0%	0%	0%	0%	3%

ILP 8

171-227 Garratt Lane

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	29	29	29	29	29	29	29	29	29	29	29	29
Vacant Units	3	4	3	3	2	3	6	4	6	3	7	4
Vacancy Rate	10%	14%	10%	10%	7%	10%	21%	14%	21%	10%	24%	14%

ILP 9

812-842 & 911-919 Garratt Lane

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	20	20	20	20	20	20	20	20	20	20	20	20
Vacant Units	2	0	1	0	1	1	0	0	1	3	5	1
Vacancy Rate	10%	0%	5%	0%	5%	5%	0%	0%	5%	15%	25%	6%

ILP 10

74-88 Inner Park Road

	2004	2006	2008	2010	2012	2014	2016	2018	2021	2022	Average
Total Units	7	7	7	7	7	7	7	7	7	7	7
Vacant Units	0	0	0	0	0	0	0	2	1	1	0
Vacancy Rate	0%	0%	0%	0%	0%	0%	0%	29%	14%	14%	6%

ILP 11

50-94 Lower Richmond Road

	2004	2006	2008	2010	2012	2014	2016	2018	2021	2022	Average
Total Units	23	23	23	23	23	23	23	22	22	22	23
Vacant Units	2	1	2	3	2	2	3	2	3	3	2
Vacancy Rate	9%	4%	9%	13%	9%	9%	13%	9%	14%	14%	10%

ILP 12

169-201 Merton Road

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	16	16	16	16	16	16	15	15	15	16	16	16
Vacant Units	1	2	1	0	0	0	1	1	3	3	3	1
Vacancy Rate	6%	13%	6%	0%	0%	0%	7%	7%	20%	19%	19%	9%

ILP 13

2-12 Montfort Place

	2004	2006	2008	2010	2012	2014	2016	2018	2021	2022	Average
Total Units	4	4	4	4	4	4	4	4	4	4	4
Vacant Units	0	0	0	0	0	1	1	0	0	1	0
Vacancy Rate	0%	0%	0%	0%	0%	25%	25%	0%	0%	25%	8%

ILP 14

58-86 & 91-111 Moyser Road

	2004	2006	2008	2010	2012	2014	2016	2018	2021	2022	Average
Total Units	21	21	21	21	21	21	20	20	20	20	21
Vacant Units	2	1	3	3	3	2	1	1	1	1	2
Vacancy Rate	10%	5%	14%	14%	14%	10%	5%	5%	5%	5%	9%

ILP 15

172-184 & 175-189 Northcote Road/48, 59-63 Broomwood Road

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	14	13	13	13	13	13	13	15	15	15	15	14
Vacant Units	0	0	2	2	0	1	1	3	0	0	0	1
Vacancy Rate	0%	0%	15%	15%	0%	8%	8%	20%	0%	0%	0%	6%

ILP 16

1-11 Petersfield Rise

	2004	2006	2008	2010	2012	2014	2016	2018	2021	2022	Average
Total Units	4	4	4	4	4	4	4	4	4	4	4
Vacant Units	0	1	1	0	0	0	0	0	0	0	0
Vacancy Rate	0%	25%	25%	0%	0%	0%	0%	0%	0%	0%	5%

ILP 17

1-7 Portswood Place

	2004	2006	2008	2010	2012	2014	2016	2018	2021	2022	Average
Total Units	6	6	6	6	6	6	6	6	6	6	6
Vacant Units	0	2	0	1	1	1	1	1	2	1	1
Vacancy Rate	0%	33%	0%	17%	17%	17%	17%	17%	33%	17%	17%

ILP 18

1-6 Rockingham Close

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	4	4	4	4	4	4	4	3	3	4	4	4
Vacant Units	0	0	0	0	0	0	0	0	0	0	0	0
Vacancy Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

ILP 19

115-141 St Johns Hill

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	17	17	17	17	17	17	17	17	16	17	17	17
Vacant Units	1	1	1	4	0	1	1	0	0	0	1	1
Vacancy Rate	6%	6%	6%	24%	0%	6%	6%	0%	0%	0%	6%	5%

ILP 20

323-409 Tildesley Road

	2004	2006	2008	2010	2012	2014	2016	2018	2021	2022	Average
Total Units	20	20	20	20	20	20	20	20	20	20	20
Vacant Units	6	7	7	5	8	8	6	12	13	11	8
Vacancy Rate	30%	35%	35%	25%	40%	40%	30%	60%	65%	55%	42%

ILP 21

314-324 Trinity Road

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	Average
Total Units	6	6	6	6	6	6	6	5	5	5	5	6
Vacant Units	0	0	0	1	0	0	0	1	0	0	0	0
Vacancy Rate	0%	0%	0%	17%	0%	0%	0%	20%	0%	0%	0%	3%

ILP 22

271-299 Upper Richmond Road

	2004	2006	2008	2010	2012	2014	2016	2018	2021	2022	Average
Total Units	13	11	11	11	12	12	12	12	12	12	12
Vacant Units	1	0	0	0	1	1	1	1	1	0	1
Vacancy Rate	8%	0%	0%	0%	8%	8%	8%	8%	8%	0%	5%

ILP 23

349-393 Upper Richmond Road

	2004	2006	2008	2010	2012	2014	2016	2018	2021	2022	Average
Total Units	21	21	21	21	21	21	21	21	21	21	21
Vacant Units	1	1	2	0	0	0	0	0	0	0	0
Vacancy Rate	5%	5%	10%	0%	0%	0%	0%	0%	0%	0%	2%