

Wandsworth Town Centre and Retail Needs Assessment Final Report

Wandsworth Borough Council

Tuesday, June 23, 2020

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Contents

1.0	Introduction	1
	Background	1
2.0	Town centre market trends	2
	Consumer expenditure	2
	Mode of travel	5
	Demand for Class A floorspace	6
	Tourism, culture and entertainment	10
	Summary	11
3.0	Hierarchy of centres	12
	New London Plan Hierarchy	12
	Relative attraction of centres	15
	Property indicators	16
4.0	Retail need assessment	24
	Population and expenditure	24
	Existing spending patterns	24
	Need for convenience goods floorspace	26
	Need for comparison goods floorspace	29
5.0	Other town centre uses	32
	Food and beverage	32
	Other Class A1 and A2 service uses	34
	Commercial leisure	34
6.0	Accommodating growth	42
	Introduction	42
	Strategy for accommodating growth	43
	Spatial strategy	45
7.0	Strategic policy analysis	50
	Overview	50
	Hierarchy of centres	52
	Floorspace projections and allocations	54
	Impact test	55

	Sequential approach	57
	Impact and sequential test summary	58
8.0	Area specific policy review	60
	Overview	60
	Protected shopping frontages and local shops	60
	Balham Town Centre	63
	Clapham Junction Town Centre	64
	Putney Town Centre	65
	Tooting Town Centre	66
	Wandsworth Town Centre	67
9.0	Summary and conclusions	69
	Wandsworth Borough's needs	69
	Strategy for accommodating growth	71
	Policy review	72
	Strategic priorities for town centres	74
	Future monitoring	76

Appendices

- Appendix 1 Methodology
- Appendix 2 Study area
- Appendix 3 Centre health checks
- Appendix 4 Operator requirements
- Appendix 5 Convenience goods capacity
- Appendix 6 Comparison goods capacity
- Appendix 7 Food/beverage capacity
- Appendix 8 Stakeholder contacts

1.0 Introduction

Background

1.1 Lichfields was commissioned by the London Borough of Wandsworth to prepare the Wandsworth Retail and Town Centre Needs Assessment published in April 2013 (WRTCNA). This report supersedes the WRTCNA. It updates the retail and leisure projections and provides a more comprehensive analysis of the role and function of designated centres within and surrounding the Borough.

1.2 The study seeks to provide robust evidence and main objectives are to:

- identify the Borough's needs for convenience and comparison retail, wider retail uses (Class A2-5) and commercial leisure uses over a 15 year period;
- assess the Borough's capacity to meet these needs taking account of protected shopping frontages, and other areas of the borough identified for retail and mixed use development, including at Battersea Power Station, the CAZ and Vauxhall Nine Elms Battersea (VNEB);
- quantify available expenditure within catchment areas, identifying expenditure flows and new retail and related development in nearby boroughs;
- update the qualitative assessment of need and capacity to include identification of gaps in provision and the range/mix of retailer representation;
- assess the role and function of Wandsworth's hierarchy of Town and Local Centres and Important Local Parades, including town centre health checks;
- provide recommendations on appropriate Local Plan interventions/policies to meet needs and accommodate growth.

1.3 Experian's latest expenditure projections and deductions for home shopping were published in February 2020, and therefore take account of Experian's recent views on general retail market conditions and the post Brexit economy. However, Experian's projections do not reflect the potential impact of the coronavirus pandemic. This study assumes this impact will be short-term and there will be a return underlying growth over the long-term.

2.0 Town centre market trends

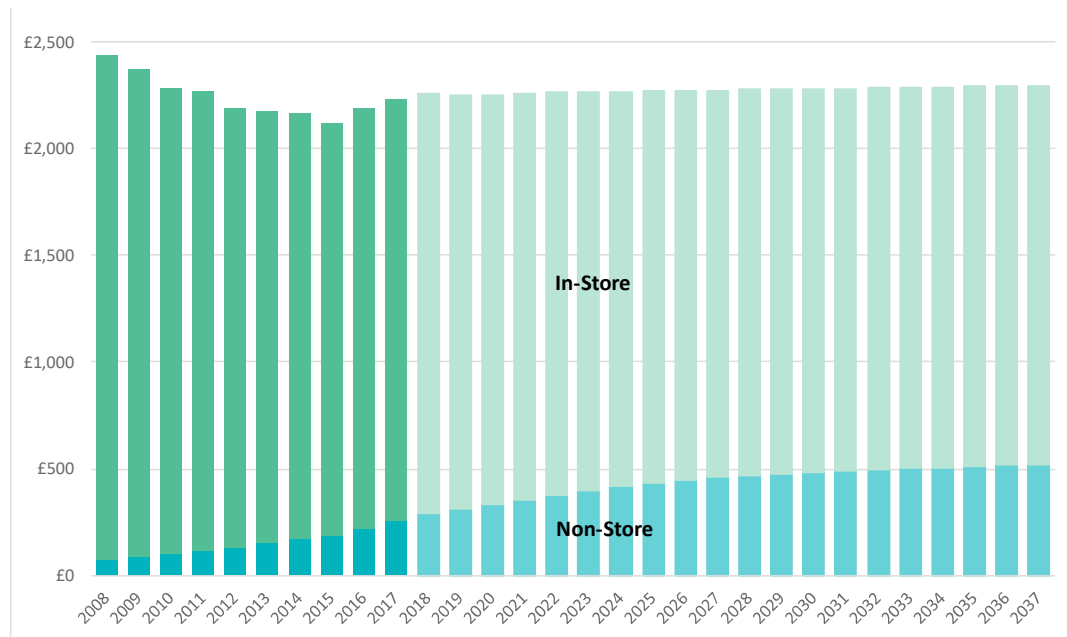
2.1 This section outlines underlying trends that are likely to influence the need for retail and town centre facilities in Wandsworth Borough and the prospects for attracting new investment. The relevant results from a household shopper survey have also been reviewed and summarised.

Consumer expenditure

2.2 Historic trends indicate that consumer expenditure has consistently grown in real terms, generally following a cyclical growth trend. Expenditure growth has fuelled demand for new retail floorspace, including major out-of-centre development. Since the last recession expenditure growth has been much slower. The demand for retail floorspace has reduced. Underlying trends still show consistent growth that should continue in the future. Experian's latest post Brexit forecasts suggests slower growth in the short-term and home shopping/ internet spending is expected to grow at a faster rate than traditional shopping. Experian's short-term expenditure projections (2020 and 2021) expect retail and leisure growth but do not reflect the coronavirus pandemic. These projections now seem optimistic and at least a short-term fall in expenditure on comparison goods, food/beverage (consumed away from the home), cultural and leisure spend now seems likely. The convenience goods/food store sector could benefit from a transfer of expenditure due to the temporary closure of pubs, bars, restaurant and cafés. Home delivery retail businesses could also benefit. At present there is no available data to confirm these potential impacts or the effectiveness of the Government's counter measures.

2.3 For convenience goods, Experian's latest forecasts (February 2020) anticipate limited growth (0.1% per annum). Actual average growth in convenience goods expenditure growth per capita in the UK between 2008 to 2018 and forecast future growth is shown in Figure 2.1.

Figure 2.1 UK average convenience goods retail expenditure per person (£ per annum)



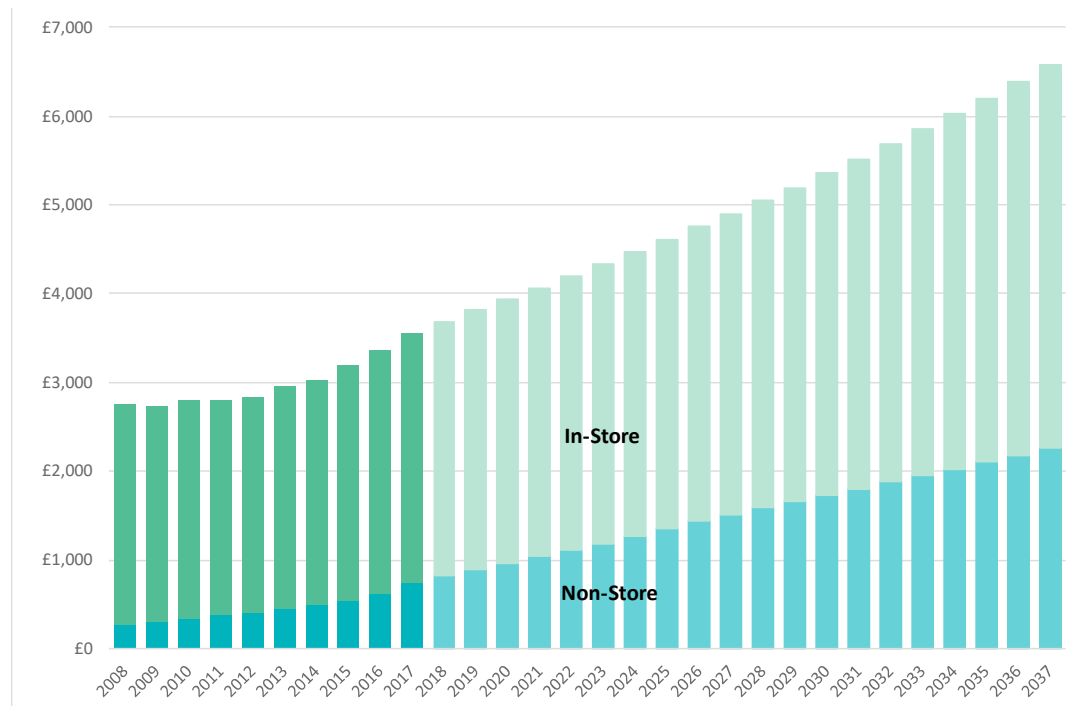
Source: Experian Briefing Note 17 (February 2020)

2.4 Figure 2.1 indicates that convenience goods expenditure per person decreased between 2008 and 2015 but recovered up to 2018. Experian expects slow growth in the future, but most of the

growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Wandsworth Borough is likely to relate to population growth, high current levels of trading and/or qualitative areas of deficiency.

- 2.5 For comparison goods, higher levels of growth are expected in the future (3.0% to 3.2% per annum), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends. Actual and forecast average growth in comparison goods expenditure growth per capita is shown in Figure 2.2. As indicated above, the short-term growth projections for 2020 and possibly 2021, now seem optimistic in the light of the coronavirus pandemic. Nevertheless, the long-term strategy for Wandsworth Borough will need to assume a return to underlying growth and should plan for this potential growth.

Figure 2.2 UK average comparison goods retail expenditure per person (£ per annum)



Source: Experian Briefing Note 17 (February 2020)

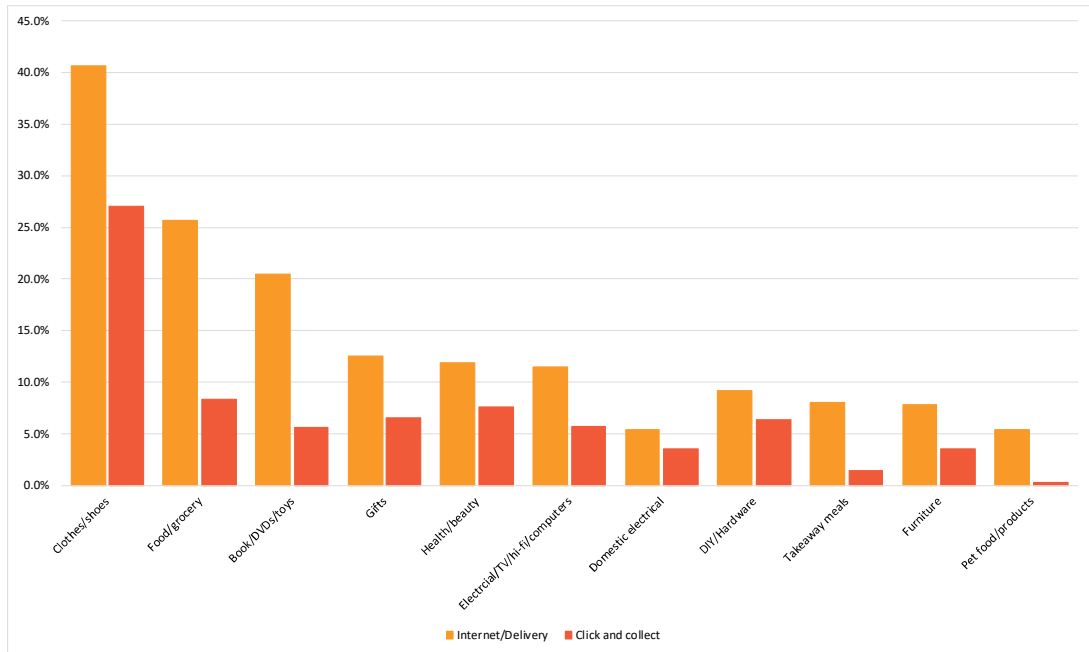
- 2.6 New forms of retailing (multi-channel and home shopping) have and will continued to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. 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. National trends within this sector will have implications for all areas including Wandsworth Borough, because they have affected the amount of expenditure growth that is available to support development and reduced operator demand for new floorspace. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 17 (February 2020) states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for close to 20% of total retail sales."

... We expect the SFT market share to continue to increase over the forecast period, reaching 26% by 2025 and around 30% by 2030."

- 2.7 The floorspace capacity assessment in this Study makes an allowance for future growth in e-tailing based on Experian projections and household shopper survey results.
- 2.8 Figure 2.2 indicates that comparison goods expenditure per person grew slowly between 2008 and 2014, but higher growth was achieved up to 2018. Experian expect steady growth in the future. Even allowing for disproportionately higher growth in non-store sales, comparison goods expenditure available for traditional forms of retailing is still expected to grow in real terms. The implications of these trends on the demand for retail and food/beverage space have been considered. Some operators provide online sales from their traditional premises e.g. food store operators and click/collect operations, therefore growth in online sales may not always mean there is a reduction in the need for traditional retail floorspace.
- 2.9 Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.
- 2.10 Assessing future expenditure levels needs to consider the likely pace of economic growth. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study provides a long-term view for the plan period. Growth trends in population, home shopping/internet sales and in turnover efficiency also need to be considered and a balanced approach taken.
- 2.11 Reflecting these national trends, the Wandsworth household survey results undertaken in January 2020, indicate that 73% of households regularly buy items from the internet for home delivery and 45% of households regularly buy via click and collect. Over 20% of households do most of their non-food shopping via internet/delivery.
- 2.12 Based on the household survey results, the main products regularly purchased via internet/delivery or via click and collect are shown in Figure 2.3.
- 2.13 These results indicate that a wide range of goods are purchased via the internet for delivery and click and collect. Clothing/shoes and food/grocery shopping are the items most often purchased via the internet, although food and grocery shopping via click and collect is less popular. At present delivery is about twice as popular as click and collect, but both activities are significant.

Figure 2.3 Items regularly purchased via the internet of click and collect (% of respondents)

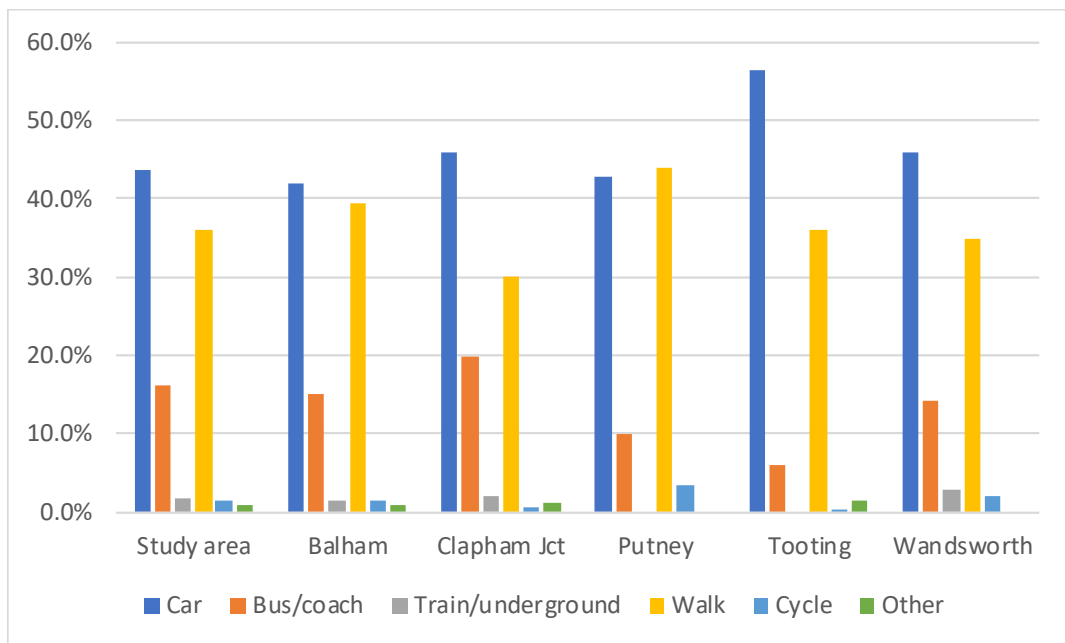


Mode of travel

2.14

Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by a variety of means of travel. The results for food and non-food shopping (excluding internet/home shopping) indicated by the household survey results are shown in Figures 2.4 and 2.5.

Figure 2.4 mode of travel for main food shopping (% of household respondents)

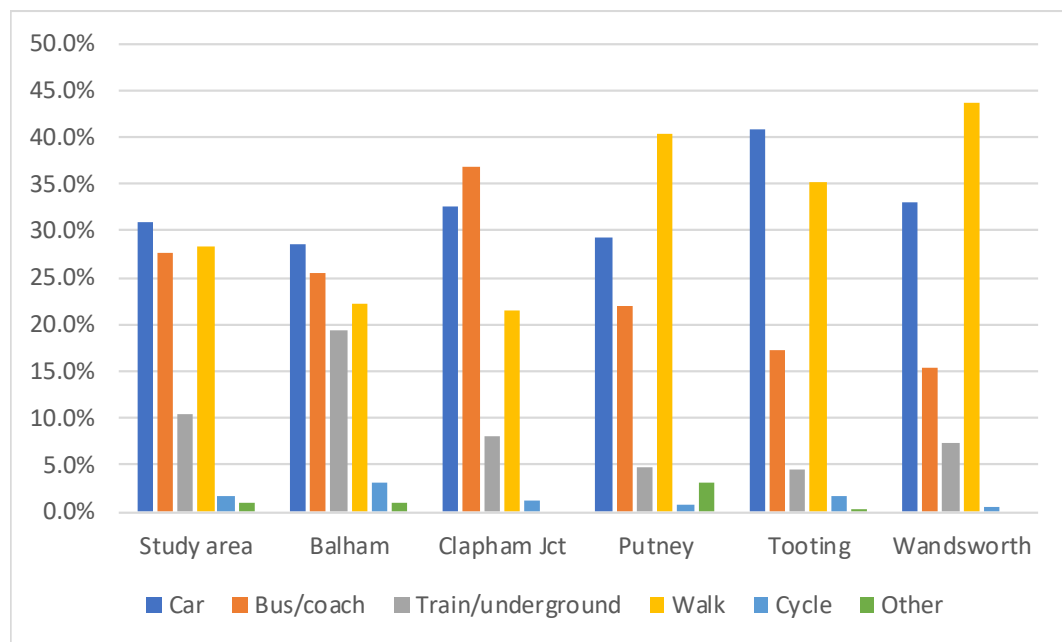


Source: NEMS Household Telephone Survey result 2020

2.15 Shopping by car (driver or passenger) is the most popular mode of travel for main food shopping trips within all study area zones, with a study area average of 43.6%, which is similar to the car usage recorded in the 2012 survey. However, based on Lichfields' recent experience car usage is lower in London when compared with other parts of the country i.e. normally 70% to 80% of households for main weekly shopping.

2.16 A significant proportion of households walk or use the bus for their food shopping, with a study area average of 52.2%, which is slightly higher than the results in the 2012 survey. These results suggest that whilst many households still choose to do bulk food shopping trips by car, more households chose to walk or use the bus for main food shopping. These results suggest many households may be undertaking smaller but more frequent food and grocery shopping trips than in 2012. This trend mirrors the significant growth in small convenience stores since 2012.

Figure 2.5 Mode of travel for non-food shopping (% of household respondents)



Source: NEMS Household Telephone Survey result 2020

2.17 A lower proportion of households do their non-food shopping by car (30.9%) when compared with food shopping (43.6%). Public transport (bus, train and underground) are used more for non-food shopping, suggesting customers are prepared to travel longer distances for non-food shopping.

2.18 These results indicate that town centres accessible by a variety of means of transport, with car parking and a large residential catchment population within walking distance should have the best prospects for being successful shopping destinations.

Demand for Class A floorspace

2.19 Lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the past decades. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but have now increased to 12.4% in 2020. GLA Town Centre Health Check data suggests the London average vacancy rate (8.6% in 2016) was lower than the UK average. It is possible there will be a sharp increase

in shops vacancies in most town centres as and when the impacts of the coronavirus pandemic are felt.

- 2.20 Data obtained in 2018 suggest there were 232 vacant Class A1-A5 shop units (excluding other use class units e.g. B1/D1/D2) within Wandsworth Borough's designated core, secondary and other frontages and Important Local Parades, with floorspace totalling 33,800 sq.m. This includes 132 vacant units in all frontages within the five main Town Centres (an average vacancy rate of 9.7%) and 100 vacant units in Local Centres and Important Local Parades (an average vacancy rate of 13.1%). The overall vacancy rate (10.9%) is slightly lower than the Goad UK average of 12.4%, but higher than the GLA average (8.6%). Overall, the vacancy figures suggest all centres in the Borough are performing satisfactorily in challenging market conditions.
- 2.21 A combination of slower economic growth and multi-channel shopping has had a significant impact on the retail and leisure sectors, and continuing uncertainties are still having an effect. Many high profile national operators have failed, leaving major voids within centres and retail parks. The latest operators to experience difficulties include Debenhams, House of Fraser, New Look, Carpetright, Prezzo, Chimichanga, Strada, Byron, Marks & Spencer and Jamie Oliver, which indicates current market conditions are challenging. It seems likely the coronavirus pandemic will result in further casualties both multiples and independents.
- 2.22 Many town centre development schemes have been delayed or cancelled and the demand for traditional bulky goods retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth, with discount operators taking market share from the main operators.
- 2.23 Property owners, landlords and funds have also come under pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e. an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all of its debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets. These trends are likely to be exacerbated by the coronavirus pandemic, at least in the short-term.
- 2.24 Whilst the CVA process has created headaches for landlords in terms of rent negotiations, at the same time newly freed-up space has opened up new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

Food store operators

- 2.25 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).
- 2.26 The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. Taking Sainsbury's as an example, data provided by Mintel indicates that the number of Sainsbury's Local stores increased by 76% between 2011 and 2016.
- 2.27 Several proposed larger food stores have not been implemented across the country. There has been a move away from larger stores to smaller formats, reflecting changes in customers' shopping habits. The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. There are Aldi and/or Lidl stores in Balham, Clapham Junction and Tooting. The discount sector is continuing to expand, and Lidl is listed as having an additional requirement in Wandsworth Borough (source: The Requirements List – February 2020).

Comparison retailers

- 2.28 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers have sought large out-of-centre stores, for example Next and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends have slowed significantly and are unlikely to change for the foreseeable future.
- 2.29 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This can lead to the relocation of retailers creating more vacant units in town centres. The retail warehouse sector is generally less well represented in London and existing retail parks have been redeveloped for more intensive mixed use development.
- 2.30 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger national, regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. Polarisation of investment in the larger centres is likely to continue in the future.
- 2.31 In general operator demand for space has decreased since the last recession and, of those national multiples looking for space, many prefer to locate in larger or purpose-built centres, e.g. Croydon, Kingston, Westfield and the West End outside of the Borough. Centres in Wandsworth are at a lower level in the hierarchy and whilst these centres have attracted recent investment, multiple operator demand may be lower in these centres in the future. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping.
- 2.32 The continuation of these trends will influence future operator requirements in Wandsworth Borough with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in the main centres. However, smaller vacant units could still be attractive to independent traders and non-retail services, assuming a return to normal levels of growth following the coronavirus pandemic.
- 2.33 The potential expansion proposals at Croydon, if implemented, could attract occupier demand and reduce the prospects for attracting investment in other parts of South and South West London including Wandsworth Borough.

Charity and discount shops

- 2.34 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will end. Planning policies cannot control the amount of charity shops because they fall within Class A1, the same category as other shops. In many centres, charity shops have occupied vacated shop premises during the recession. This trend is evident in Wandsworth Borough, but charity shops do not dominate centres. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary retail frontages.

Non-retail services

2.35 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The service uses are categorised as follows:

- Class A1 services cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
- Class A2 services include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- Class A3/A5 including restaurants, cafes (A3) and takeaways (A5).
- Class A4 pubs/bars (Class A4).

2.36 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights to control the growth of these uses in town centres. This trend has not been particularly prevalent in Wandsworth Borough. Recent changes to the GPDO has had an impact on some town centres. These measures allow for greater flexibility for changes of use from retail to non-retail uses e.g. Class A uses to C3 residential use and Class A1 uses to Class A2 uses. These measures can change the composition of town centres e.g. the amount of Class A1 space has reduced. However, these measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages.

Food and beverage and the evening economy

2.37 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage. Recently some restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand has continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed and specialist restaurants have also expanded rapidly for example vegan restaurants. However, the hospitality sector could be the most adversely affected by the coronavirus pandemic and the potential for growth in the short-term is bleak.

2.38 The key categories for food and beverage offer are:

- **Impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;
- **Speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- **Refuel and relax:** a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- **Casual dining/leisure dining:** incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

2.39 National information available from Experian Goad Plans indicates that the proportion of non-retail uses within town centres has increased over the last decade as shown in Table 2.1. The proportion of Class A1 retail uses in Goad town centres has decreased significantly between

2000 and 2019, whilst Class A3/A5 food and drink uses have significantly increased in proportional terms, despite the increase in shop vacancy rate.

Table 2.1 UK Goad Plan town centres use class mix

Use Class type	Proportion of total number of units (%)				
	2000	2005	2009	2012	2019
Class A1 (Retail)	59.1	56.4	54.0	49.5	41.2
Class A1/A2 (Services)	18.5	19.9	20.1	20.8	25.6
Class A3/A4/A5	11.2	13.7	14.5	16.1	20.8
Vacant/under Const.	11.2	10.1	11.4	13.7	12.4
Total	100.0	100.0	100.0	100.0	100.0

Source: Experian Goad Centre Reports

- 2.40 Growth in Class A3-A5 uses within town centres is likely to continue in the future, as town centres seek to broaden their attraction in response to the increase in multi-channel shopping. This trend has been experienced in Wandsworth Borough, but a short-term reduction seems likely following the coronavirus pandemic.

Pop-up spaces

- 2.41 The increase in vacant space has led to an increase in premises available for temporary uses or pop-up uses including pop-up restaurants, pop-up bars, pop-up shops and pop-up galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations across London in order to test and learn before committing to permanent stores.

Tourism, culture and entertainment

- 2.42 The New London Plan recognises the restructuring of the retail sector outlined above. The plan promotes a diverse range of uses to support the vitality and viability of town centres and encourages the repurposing/redevelopment of surplus retail space for alternative main town centre uses. The importance of the visitor/tourism sector to London's economy is highlighted and is expected to grow. The strategy seeks to enhance and extend London's visitor attractions, cultural infrastructure, night-time economy, convention facilities and accommodation. These main town centre uses are expected to be focused in the London CAZ and town centres outside the CAZ.
- 2.43 The GLA Economics Paper "Projections of demand and supply for visitor accommodation in London to 2050" (April 2017) indicated London attracted over 31.5 million over-night visitors in 2015, 41% domestic and 51% international. The total number of visitor nights was 138.5 million nights. The GLA's economic paper projects over-night stays will increase to 196.4 million in 2041, an increase of 42% (1.4% per annum). These visitors were accommodated in 145,737 serviced rooms. Most of these rooms are in central London. Only 1,393 of which are located in Wandsworth Borough (just under 1% share of London's total) but there is potential for well-connected town centres outside central London to accommodate growth.

Summary

- 2.44 The national and London wide trends identified above indicate town centres have and will continue to face major structural changes. Over reliance on the retail sector for growth and change in the past cannot continue. Diversification will be required to maintain resilient, vital and viable town centres.
- 2.45 The growth of home shopping is not new and has been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases, town centres recovered during periods of stronger growth. The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national shop vacancy rate increased to over 14% during the last recession but has not returned to pre-recession levels (around 8%). The national vacancy rate remains over 11%, and therefore a cautious approach to future growth is required.
- 2.46 Shopping and leisure behaviour will continue to change, and the high street will need to continue to respond. Growth in the tourism sector in London, if achieved, should provide opportunities for diversification. All centres in London will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience for those looking for a “day out” or “evening out”.
- 2.47 Growth in these sectors should provide further opportunities to diversify uses within town centres, including the repurposing or redevelopment of any surplus retail space, noting the potentially negative impact of coronavirus on such uses in the shorter-term.

3.0 **Hierarchy of centres**

3.1 This section summarises current provision and an assessment of the hierarchy and role of centres within Wandsworth Borough, and their relationship within the neighbouring boroughs.

New London Plan Hierarchy

3.2 Within the New London Plan, the Borough contains four major centres, three district centres and two potential CAZ retail clusters, as follows (Wandsworth Local Plan designation in brackets):

Major Centres

- Clapham Junction (LP - Town Centre)
- Putney (LP - Town Centre)
- Tooting (LP - Town Centre)
- Wandsworth (LP - Town Centre)

District Centres

- Balham (LP - Town Centre)
- Earlsfield (LP – Local Centre)
- Lavender Hill/Queenstown Road (LP – Local Centre)

Future CAZ Retail Clusters

- Vauxhall
- Battersea

3.3 These centres are supported by 7 more Local Centres and 23 Important Local Parades. These perform a local shopping and service function, but usually with a limited choice of shops and services. A map showing the main town and district centres in the Borough is shown in Figure 3.1 overleaf. The current adopted London Plan and the intention to publish version of the Plan set out the London wide shopping hierarchy, as shown below in Figure 3.2. The main centres within the Borough compete with major shopping destinations outside the Borough, including:

- Central London;
- Westfield Shopping Centre at Shepherds Bush;
- King's Road;
- Kensington High Street;
- Knightsbridge;
- Kingston-upon-Thames;
- Croydon;
- Brixton;
- Streatham;
- Richmond; and
- Wimbledon.

Figure 3.1 London Borough of Wandsworth town and local centres - Wandsworth Local Plan – Core Strategy (Adopted 2016)

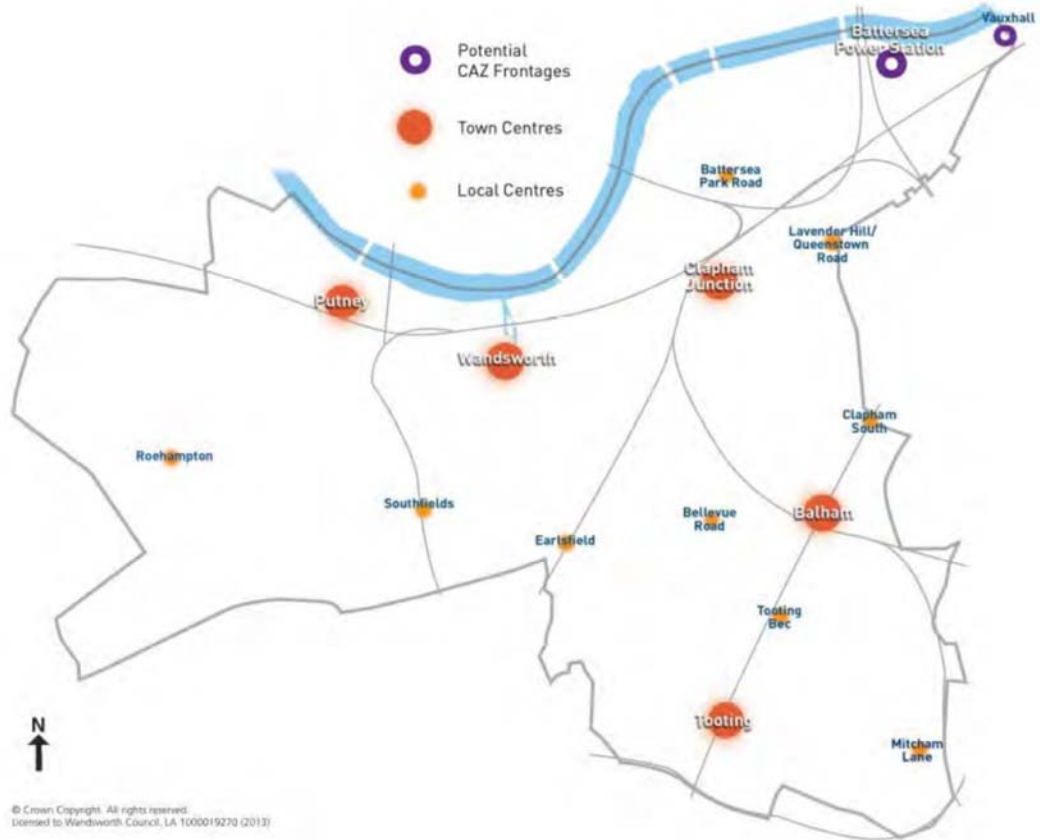
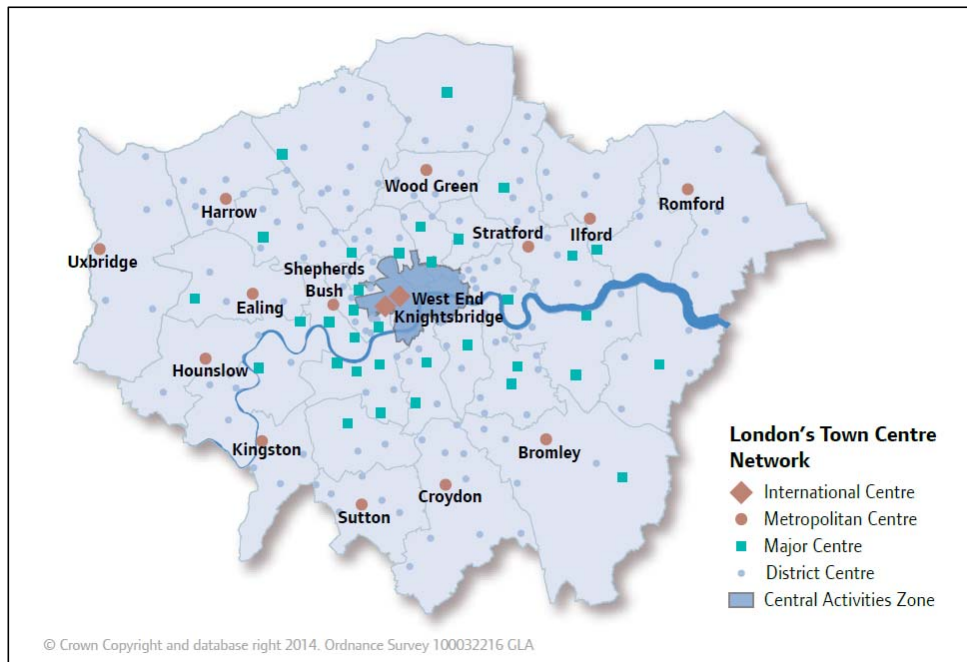


Figure 3.2 London's town centre network



Source: GLA London Plan (2016)

- 3.4 International Centres are located in Central London. Westfield at Shepherds Bush is expected to become a new International Centre within the new London Plan. The outer London suburbs in West and South West London are served by Metropolitan Centres i.e. Croydon, Ealing, Hounslow and Kingston. Clapham Junction, Putney, Tooting and Wandsworth are third-tier Major Centres, whilst Balham, Earlsfield and Lavender Hill/Queenstown Road are fourth-tier District Centres.
- 3.5 The scale and mix of uses within the sub-region based on data from the GLA's 2017 London Town Centres Health Checks is shown in Table 3.1.

Table 3.1 GLA London main town centres in the Wandsworth sub-region

Centre	London Plan classification	No. retail and service outlets	Comparison goods floorspace sq.m gross	Convenience goods floorspace sq.m gross	Service floorspace sq.m gross	Total floorspace sq.m gross
West End	International	1,289	445,847	15,874	12,735	474,456
Knightsbridge	International	169	134,832	1,600	2,200	138,632
Croydon	Metropolitan	385	157,155	13,850	9,800	180,805
Kingston	Metropolitan	328	134,080	9,890	5,180	149,150
Westfield London	Unclassified	282	112,657	3,610	1,420	117,687
Kings Road (East)	Major	179	47,986	3,840	1,480	53,306
Wimbledon	Major	161	37,508	11,380	4,370	53,258
Kensington High St.	Major	189	38,226	6,530	4,900	49,656
Brixton	Major	257	27,870	13,500	3,820	45,190
Richmond	Major	215	31,727	7,950	4,640	44,317
Wandsworth	Major	102	24,679	13,070	3,280	41,029
Streatham	Major	227	17,197	15,140	7,500	39,837
Clapham Junction	Major	169	22,535	11,220	4,470	38,225
Tooting	Major	174	18,547	16,040	3,370	37,957
Putney	Major	177	22,066	8,530	5,430	36,026
Colliers Wood	Unclassified	20	22,900	10,710	540	34,150
Fulham	Major	167	11,701	12,410	3,940	28,051
East Sheen	District	139	14,660	3,470	4,930	23,060
Clapham High Street	District	97	6,370	9,310	4,610	20,290
Balham	District	89	7,510	6,730	3,660	17,900
Battersea	Unclassified	3	1,832	4,097	1,599	7,528
Lavender Hill/Queenstown*	District	41	2,480	850	1,270	4,600
Southfields	Unclassified	40	1,000	2,610	610	4,220
Earlsfield	District	42	1,330	940	1,180	3,450
Vauxhall	Unclassified	11	610	1,570	170	2,350
Clapham South*	Unclassified	13	180	220	430	830

Source: GLA 2017 London Town Centres Health Check data. Wandsworth Borough centres/destinations in **bold**.

* note data relates to Goad Plan area rather than Local Plan designated centre boundary

- 3.6 This data demonstrates that GLA International and Metropolitan Centres have over 100,000 sq.m of retail/service floorspace. Major Centres range from around 30,000 to 50,000 sq.m, whilst District Centres are below 30,000 sq.m and vary significantly in size.

Relative attraction of centres

- 3.7 Venuescore ranks the UK's top 2,000 retail destinations including town centres, malls, retail warehouse parks and factory outlet centres. The results for the Borough and other relevant centres are shown in Table 3.2 and the main centres are shown on the plan below.

Table 3.2 Javelin's Venuescore UK shopping Index

Centre	UK Rank 2017	Venuescore 2017	Change in score since 2013	Market position
London, West End	1	1,625	+232	upper middle
Kingston-upon-Thames	18	382	+15	upper middle
Croydon	23	328	+22	middle
Westfield, Shepherds Bush	23	328	+10	upscale
Knightsbridge	41	279	+17	upscale
Kings Road	72	201	-4	upscale
Richmond	97	184	+24	upscale
Wimbledon	121	171	-4	upper middle
Clapham Junction	129	167	+24	middle
Kensington High Street	133	165	+1	upper middle
Putney	143	156	+10	upper middle
Wandsworth Town	169	139	+35	middle
Brixton	242	104	+19	middle
Tooting	292	91	+9	middle
Balham	343	80	+17	middle
Streatham	355	78	+8	lower middle
Clapham High Street	463	63	+13	upper middle
East Sheen	754	41	+1	upper middle
Merton	1074	30	+5	middle
Wandsworth Bridge Road	1276	25	+6	middle
Wandsworth Common	1418	22	+6	upscale
Barnes	1481	21	+6	upper middle
Battersea Park	2021	15	+4	upper middle
Southfields	2021	15	+2	upper middle
Earlsfield	2021	15	+5	middle
Roehampton	2171	14	n/a	middle
Lavender Hill	2815	11	0	upper middle

Source: Javelin Group 2017

- 3.8 Each shopping destination is given a weighted score for multiple retailers present. The score attached to each retailer is weighted depending on their overall impact on shopping patterns. The Venuescore usually correlates to the actual market size of the shopping destination in terms of consumer expenditure, but some larger shopping centres such as Westfield have fewer but larger stores and town centres with a higher proportion of independent stores can generate spending levels in excess of their relative Venuescore. Javelin also assesses the market position of the larger town centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury (i.e. lower, middle to upscale).
- 3.9 Consistent with the five designated town centres, the Javelin index ranks Clapham Junction, Putney, Wandsworth Town, Tooting and Balham as the main centres within the Borough. Other centres feature much lower in the rankings and achieve relatively low scores. Central London, Kingston, Croydon and Westfield are ranked at the top of the hierarchy. Other GLA Major

Centres including Richmond, Kings Road, Kensington High Street, Wimbledon, Brixton and Streatham and are all ranked within the top 400, their scores reflect the higher number of national multiple retailers. These centres compete directly with the main centres in Wandsworth Borough.

3.10 The top ranked centres also have the higher market positions, with a focus on luxury rather than discount products. These larger centres attract customers from across London and tourist visitors. Balham, Clapham Junction, Wandsworth and Tooting are considered to be middle market by Javelin, whilst Putney is considered to be upper middle market.

3.11 The household survey results indicate that Wandsworth Town is the main non-food shopping destination in the Borough, where respondents in the study area suggest their household does most of their shopping. The key results are:

- Wandsworth Town 13.4%
- Clapham Junction 5.1%
- Putney 4.3%
- Tooting 4.1%
- Balham 2.0%

3.12 The main destinations outside the Borough were Chelsea incl. Kings Road (5.3%); Central London/West (5%); Kingston (3%) and Westfield (2.2%). These results demonstrate residents within Wandsworth Borough have a significant choice of shopping destinations, reasonably accessible from their home and/or place of work.

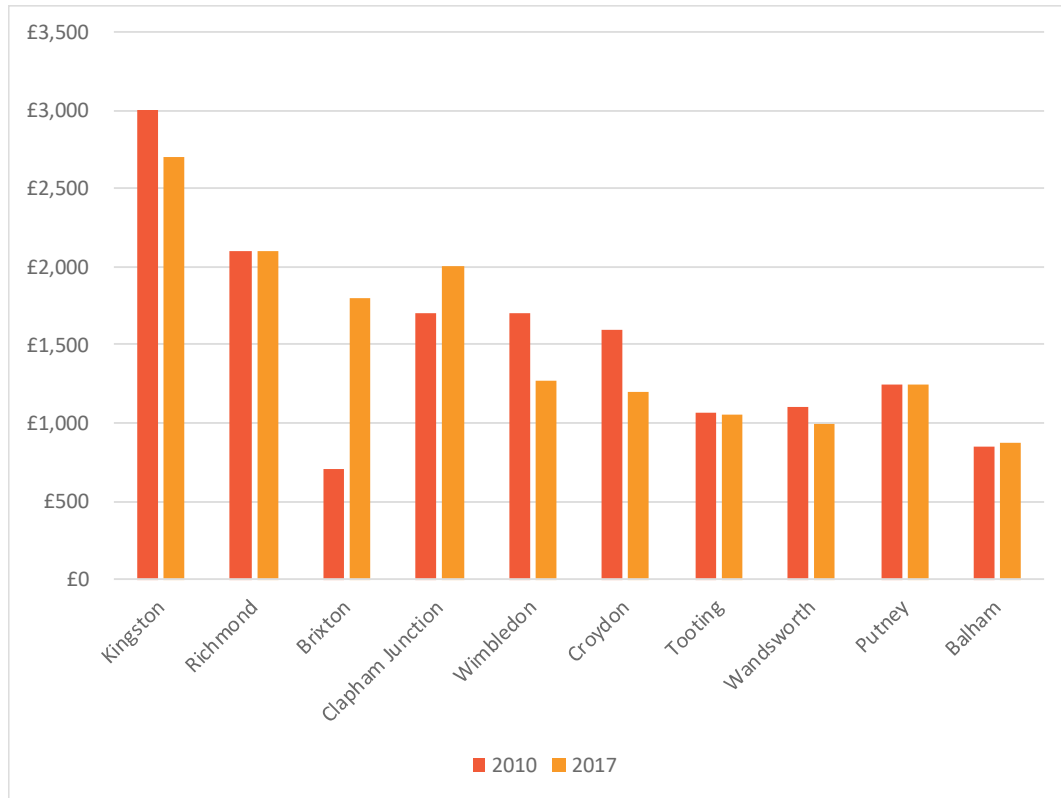
Property indicators

3.13 The relative performance and influence of retail centres can be demonstrated by commercial property values, for example Zone A rental levels achieved for retail property in each centre. Figure 3.3 below shows the prime Zone A rental values in £ per sq.m for the five main centres in the Borough and nearby competing centres.

3.14 Figure 3.3 indicates that prime Zone A retail rents vary quite significantly depending on the size and location of centre i.e. £2,700 per sq.m in the Kingston. Prime Zone A rents declined in some centres between 2010 and 2017, with the exception of Brixton, Clapham Junction and Balham. Wimbledon and Croydon experienced the largest decline in Zone A rents.

3.15 Prime Zone A retail rents tend to reflect a centre's position within the shopping hierarchy and footfall, therefore larger centres will tend to command higher rents. This trend is evident in London. As a result, retail property values are generally linked to the size of the centre and its position within the hierarchy.

Figure 3.3 Prime Zone A Rents – Selected Centres

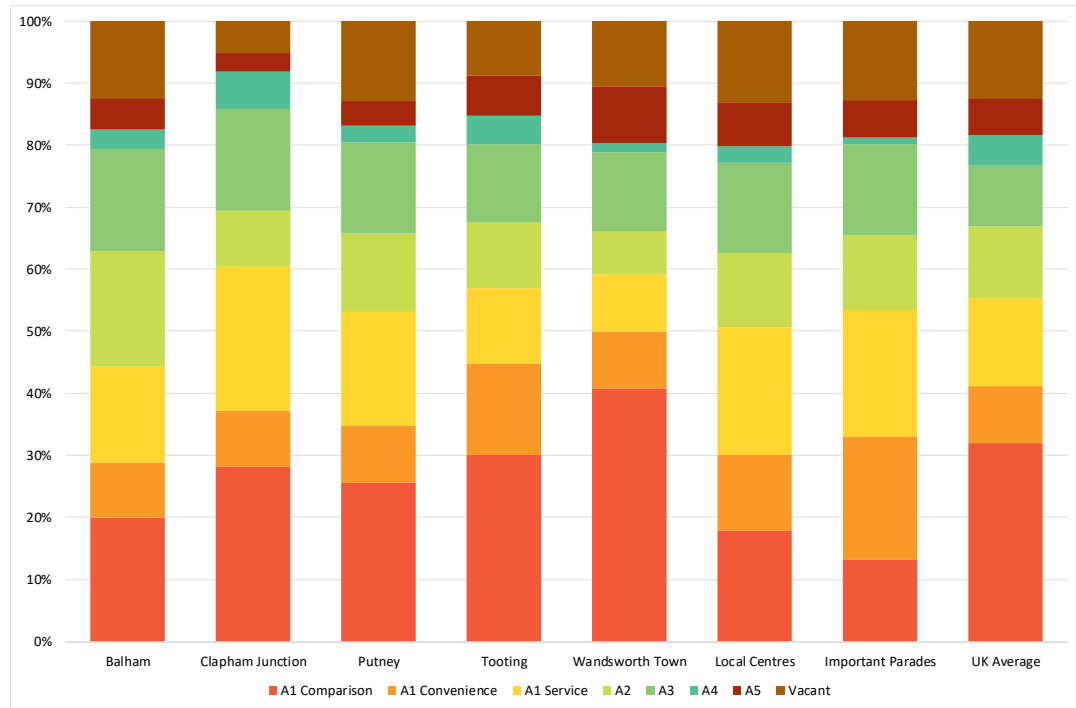


Source: Valuation Office Agency – 2010 and 2017

Diversity of main town centre uses

- 3.16 Figure 3.4 below shows the composition of the five main Town Centres, Local Centres and Important Local Parades combined in terms of the mix and proportion of different uses i.e. the proportion of shop units within each use class. This is compared with the Goad Plan average mix for all centres across the UK.
- 3.17 The centres have a good mix of uses, but all centres except Wandsworth Town have a lower proportion of Class A1 comparison goods retail units than the national average. Tooting, the Local Centres and Important Local Parades have higher proportions of Class A1 convenience goods retail. All the main centres have a higher proportion of Class A3 restaurants/cafés than the national average, but the proportion of Class A4 pubs/bars is lower than the national average apart from Clapham Junction.
- 3.18 Vacancy rates are similar to the UK average (12.4%) but are lower in Clapham Junction and Tooting. The combined vacancy rate across the Borough is 10.9%. A more detailed analysis of provision within each centre is set out in Appendix 3.

Figure 3.4 Mix of Class A1 to A5 uses



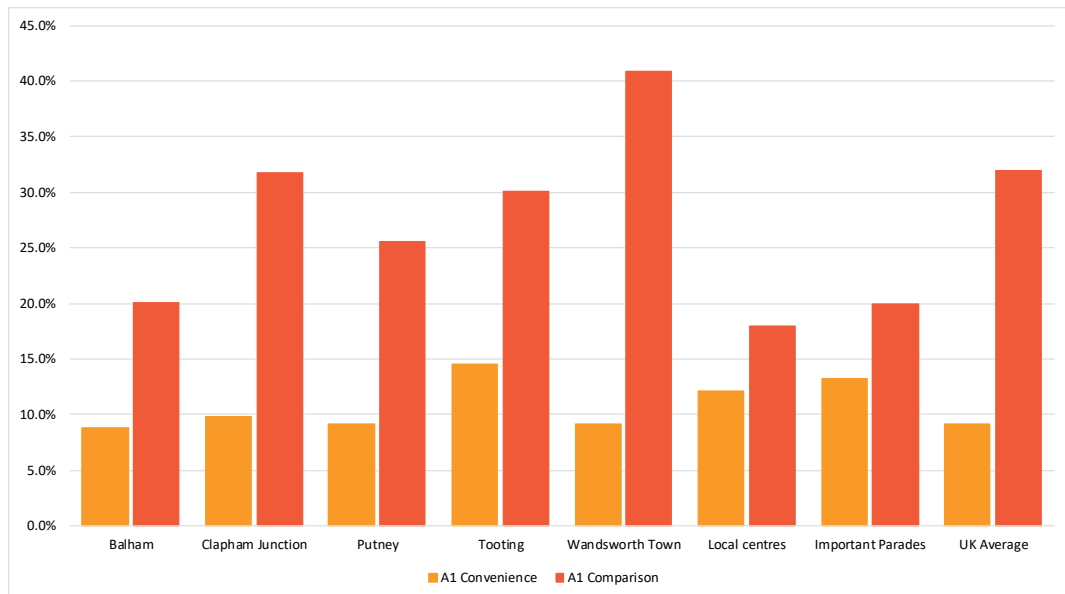
Source: Wandsworth Borough Town Centre Surveys (2018) and Experian Goad Plans (2020)

Retail representation

3.19 Figure 3.5 compares the proportion of convenience and comparison retail units within the five main Town Centres, Local Centres and Important Local Parades combined compared with the national average. All centres have a comparable or higher proportion of convenience goods units, but only Clapham Junction and Wandsworth Town have a comparable or higher proportion of comparison goods units, when compared with the national average.

3.20 Generally larger centres have a higher proportion of comparison shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail services, catering for the day to day needs of their local catchment area. This is reflected in Wandsworth Borough’s Local Centres and Important Local Parades, where convenience retail and non-retail services perform an important role catering for local needs.

Figure 3.5 Proportion of comparison and convenience retail (% total units)



Source: Wandsworth Borough Town Centre Surveys (2018) and Experian Goad Plans (2020)

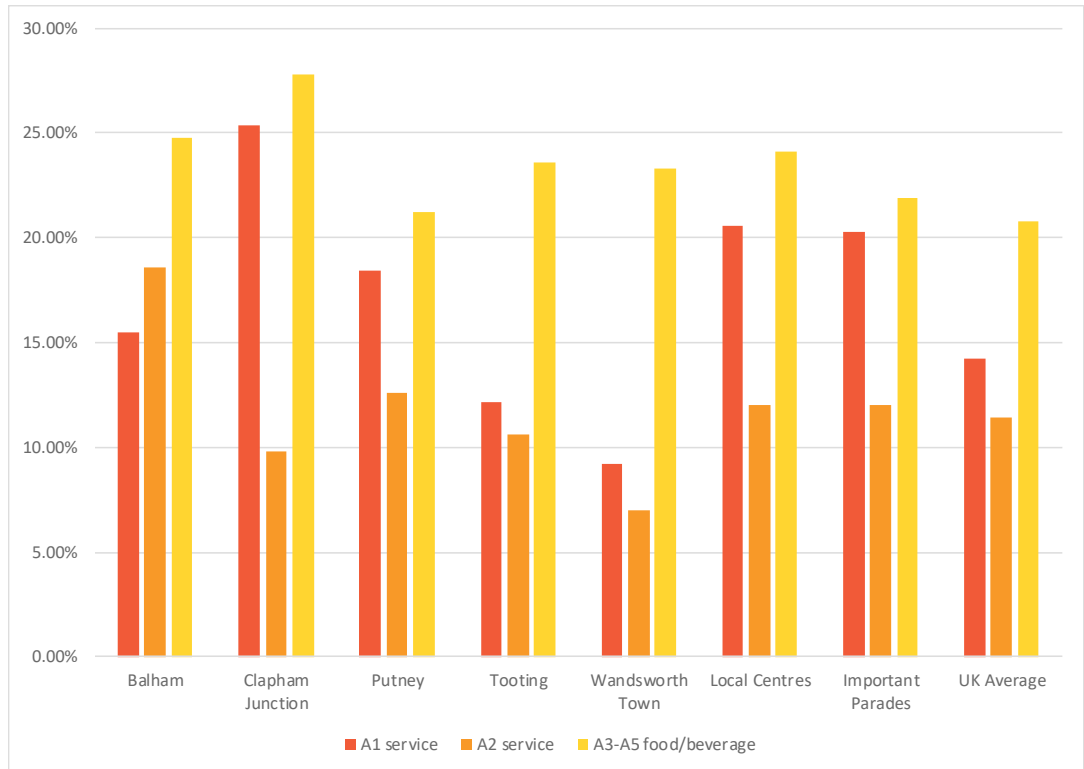
Service Uses

3.21

Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. Figure 3.6 below summarises the proportion of units in different service categories uses compared to the Goad national average. The service uses are categorised as follows:

- Class A1 services cover a range of uses, including hairdressers, dry cleaners, travel agents, beauty salons and post offices.
- Class A2 services include banks, building societies, financial services, estate agents and employment agencies. Whilst betting offices and pawnbrokers are no longer included in Class A2 (now Sui Generis), these are included in Class A2 for the purposes of this assessment.
- Class A3/A4/A5 includes restaurants, cafés (A3), pubs and bars (A4) and takeaways (A5).

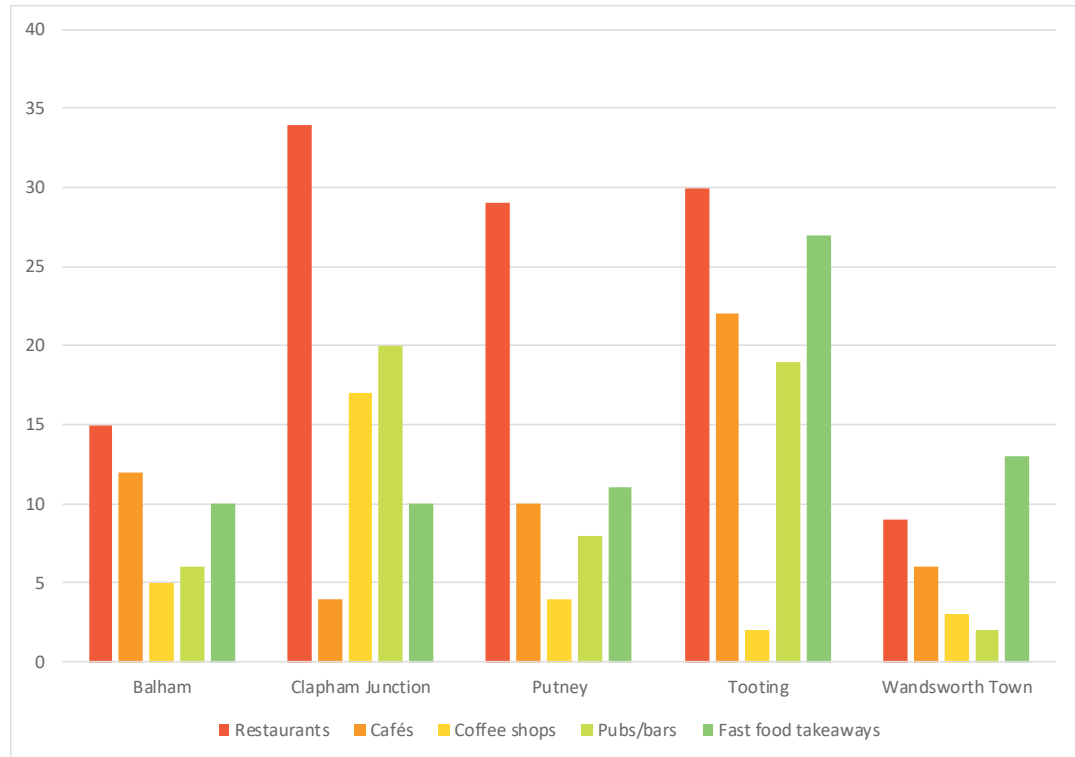
Figure 3.6 Proportion of Class A1 to A5 units (% all units)



Source: Wandsworth Borough Town Centre Surveys (2018) and Experian Goad Plans (2020)

- 3.22 All centres have a relatively high provision of non-retail services. The proportion of food/beverage outlets (Class A3/A4/A5) is particularly high. The provision of Class A1 non-retail services is high in all centres except Tooting and Wandsworth.
- 3.23 The high proportion of Class A2 services is particularly noticeable in Balham where there is a large number of estate agents, banks and other financial services.
- 3.24 The number of food/beverage outlets is examined in more detail in Figure 2.12.
- 3.25 The five main centres have a good mix of food/beverage outlets serving both the day-time and evening economies. Clapham Junction and Tooting appear to have the strongest provision of outlets serving the evening economy i.e. restaurants (rather than cafés and coffee shops) and pubs/bars. Wandsworth Town has the weakest evening economy. However, if the Ram Quarter development is successful in attracting restaurants and bars then this role should be significantly enhanced.

Figure 3.7 Number of food and beverage outlets in the five town centre (number of outlets)



Source: Experian Goad Plan, updated by Lichfields May/June 2019, Goad Plan National Averages (2018)

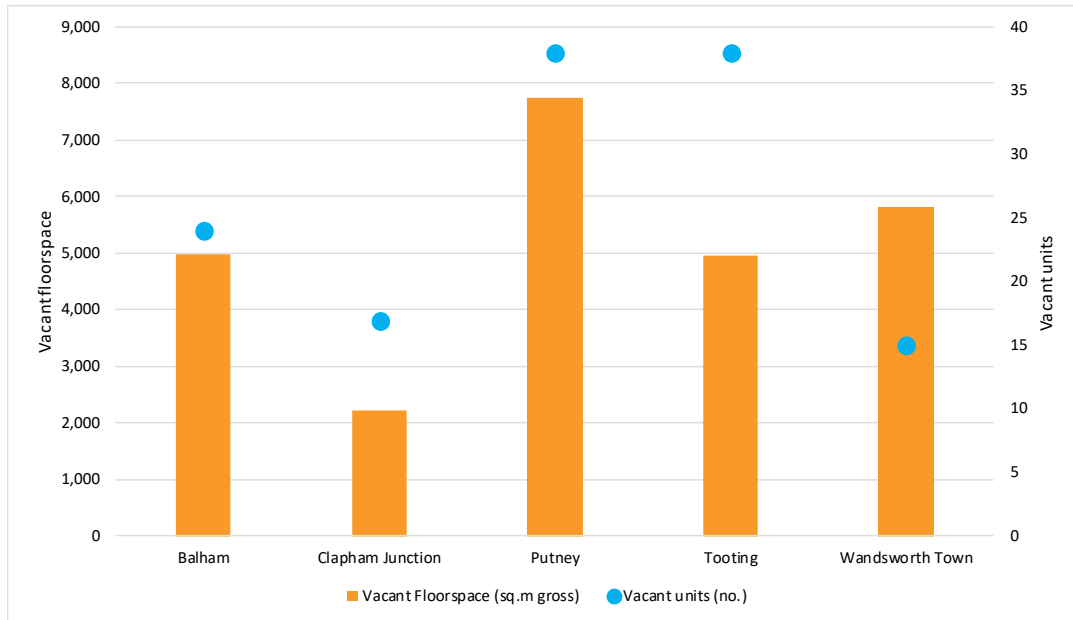
Vacant units

3.26 Figure 3.8 below identifies the number of vacant units and amount of vacant floorspace in the five main centres.

3.27 Putney has the highest number of vacant units and vacant floorspace. Wandsworth has the lowest number of vacant units (excluding the Ram Quarter) but the second highest vacant floorspace is due to large vacant premises e.g. former Debenham’s unit.

3.28 Tooting has a high number of vacant units but a relatively low level of vacant floorspace, which suggests vacant units are predominantly small (less than 150 sq.m gross).

Figure 3.8 Number of vacant units and vacant floorspace



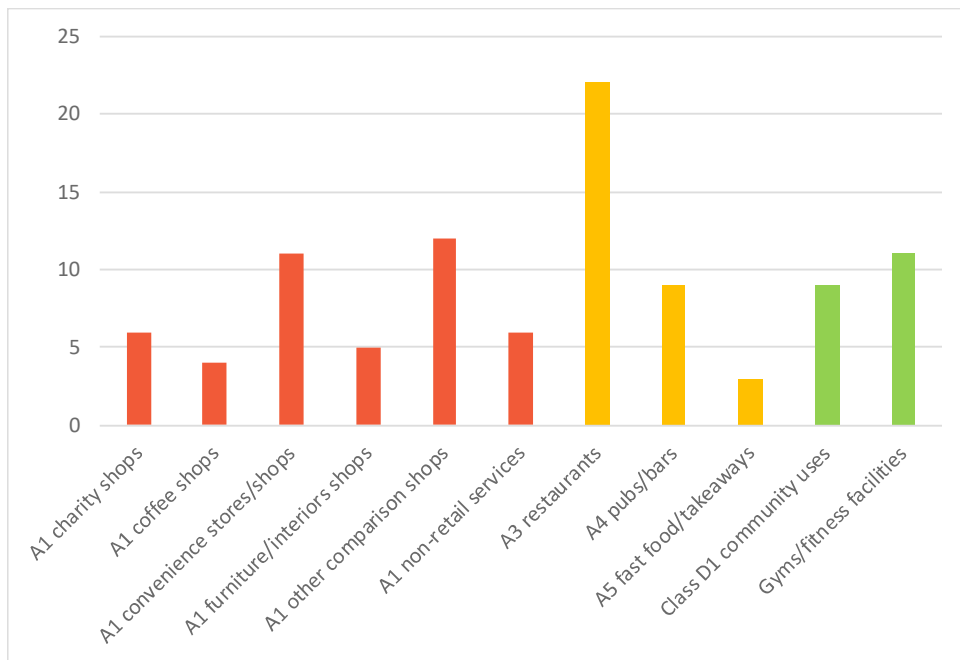
Source: Experian Goad Plan, updated by Lichfields May/June 2019, Goad Plan National Averages (2018)

Operator requirements

3.29

The Requirement List is a published source of information providing known requirements for retail, food/beverage, hotel and leisure operators' space in towns across the country. For Wandsworth Borough there are 106 retail and leisure operators listed, shown by main use type in Figure 3.9.

Figure 3.9 Published operator's space requirements in Wandsworth Borough (number of requirements by use)



Source: The Requirements List February 2020

3.30 Many of these are listed as looking for premises in more than one location, e.g. Lidl. The list of requirements for all five town centres is shown in Appendix 4. Including coffee shops, over a third of listed operators are food/beverage outlets. Excluding charity shops, only 16% are comparison goods retailers. This information confirms the shift away from retail to non-retail activities in town centres.

4.0 Retail need assessment

4.1 This section updates the quantitative scope for retail floorspace in Wandsworth Borough in the period from 2020 to 2040. The methodology adopted is set out in Appendix 1.

4.2 The analysis is based on the same study area adopted in the WRTCNA, which covers the catchment areas of the main shopping destinations in the Borough. The study area is subdivided into eight zones as shown in Appendix 2. The zones have been defined using ward boundaries.

Population and expenditure

4.1 The study area population for 2020 and projections to 2040 are set out in Table 1 in Appendix 5. Population data has been obtained from the GLA 2018-based ward projections incorporating 2017 SHLAA assumptions. Population within the study area is expected to increase between 2020 and 2040 by 12.3% (+68,251 people).

4.2 Wandsworth Borough has a relatively young adult population (aged 18 to 35) and lower proportions of children and old aged people, when compared with the London average. This age structure is reflected within Experian's local expenditure estimates adopted in this study. This age structure is expected to change in the future with a growing proportion of older aged people over 60, increasing from 13.2% of total population in 2020 to 17.3% in 2040. This trend is expected across London and nationally.

4.3 Table 2 in Appendix 5 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2040. Forecasts of comparison goods spending per capita are shown in Table 2 (Appendix 6).

4.4 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 12% from £1,185 million in 2020 to £1,326 million in 2040, as shown in Table 3 (Appendix 5).

4.5 Comparison goods spending is forecast to increase by 86% between 2020 and 2040, increasing from £1,924 million in 2020 to £3,571 million in 2040, as shown in Table 3 (Appendix 6).

4.6 It should be noted that comparison goods spending is forecast to increase more than convenience goods spending as the amount spent on convenience goods does not increase proportionately with disposable income whereas spending on non-food goods does.

4.7 These expenditure figures relate to real growth and exclude inflation. The projections also exclude special forms of trading, including home shopping, and take account of the higher growth in multi-channel and home shopping expenditure i.e. growth that will not require traditional retail floorspace is excluded. The forecasts do not take account of the impact of the Covid-19 crisis, which is likely to affect short-term expenditure growth. It is too early to assess the longer-term impact of the current crisis.

Existing spending patterns

4.8 Identified existing convenience goods retail sales floorspace within Wandsworth Borough is 66,625 sq.m net, as set out in Tables 12A and 12B in Appendix 5. This floorspace figure excludes comparison sales floorspace within food stores. Comparison goods retail floorspace within the Borough is estimated as 102,273 sq.m net, as shown in Table 12 in Appendix 6.

4.9 The results of the household shopper survey undertaken by NEMS in January 2020 have been used to calculate base year market shares. The 2020 base year market shares for convenience

goods and comparison goods shopping are shown in Table 4 in Appendix 5 and 6 respectively. Wandsworth Borough's overall market share of convenience goods expenditure in the study area is 65.9%, indicating most households tend to undertake their food and grocery shopping close to where they live. The overall market share of comparison goods expenditure in the study area is much lower at 33.8%, suggesting households are more likely to shop around and travel further for comparison goods shopping. The lower retention levels compared with the convenience goods market shares reflects the influence of higher order centres outside the Borough, in particular Croydon and Westfield. These market shares have been used to assess existing 2020 shopping patterns within the study area.

Convenience Shopping

- 4.10 The estimated 2020 market shares within the study area zones are shown in Table 4 in Appendix 5. The level of convenience goods expenditure attracted to shops/stores in the Borough is estimated to be £810.87 million, as shown in Table 5 in Appendix 5. This includes estimates of inflow from beyond the study area.
- 4.11 The total benchmark turnover of identified existing convenience sales floorspace within the Borough is £691.04 million (Tables 12A and 12b in Appendix 5 combined). This figure does not include all convenience goods sales floorspace within the Borough. It does not include small convenience stores/shops located outside of the Town/Local Centres and Important Local Parades. Nevertheless, the figures suggest that collectively convenience retail facilities in the Borough are trading healthily and probably above the national average. Based on Lichfields' recent experience, food stores within London tend to trade above national average sales densities. Food stores in London tend to be smaller with less circulation space and therefore the sales density per unit of floorspace is likely to be higher.

Comparison Shopping

- 4.12 The estimated comparison goods expenditure currently attracted by shopping facilities within the Borough is £714.95 million in 2020, as shown in Table 5 in Appendix 6. This includes estimates of inflow from beyond the study area.
- 4.13 Based on this expenditure estimate, the overall average sales density for existing comparison sales floorspace (102,273 sq.m net) is £6,991 per sq.m net. The analysis of existing comparison shopping patterns in 2020 suggests the following average sales density figures for the main areas in the Borough as shown in Table 4.1. It should be noted that the net floorspace figures exclude comparison retail floorspace within local shops outside designated centres and parades.

Table 4.1 Comparison average sales densities

Zone	Average sales density 2020 (£ per sq.m net)
Wandsworth (Zone 1)	£9,291
Putney (Zone 2)	£5,287
Tooting (Zone 4)	£4,633
Balham (Zone 5)	£8,288
Clapham Junction (Zone 6)	£6,830
Wandsworth Borough average	£6,991

- 4.14 Based on Lichfields' recent experience across the country, average sales densities for comparison floorspace can vary significantly. Average sales densities significantly above £6,000 per sq.m net are usually only achieved by relatively large and successful shopping centres. In smaller centres, usually where the property costs are much lower, these high sales densities are not normally achieved. Average sales densities of between £3,000 and £6,000 per sq.m net are

generally achieved in medium sized and smaller centres. Overall trading levels are relatively healthy in Wandsworth Borough, particularly in Wandsworth Town and Balham. Balham appears to be trading particularly healthily for a small centre with a predominance of independent shops. This may reflect the centre's relatively affluent local catchment area.

- 4.15 An allowance should be made for existing floorspace to increase its sales density in real terms in the future (2.7% per annum) to maintain the vitality and viability of town centres in the Borough.

Need for convenience goods floorspace

- 4.16 Table 6 in Appendix 5 shows future convenience goods expenditure patterns in 2025 based on constant market shares from 2020. However, the implementation of retail commitments is expected to change future market shares.

- 4.17 The Wandsworth Local Plan Monitoring Report 2018/2019 and details of major proposals approved since 2019 have been used to identify loss and gains in convenience goods sales floorspace in each study area zone, and the results are summarised in Table 7A (Appendix 5). In total convenience goods sales floorspace is expected to increase by 6,950 sq.m net, primarily concentrated in commitments within the Clapham Junction and VNEB areas. The expected turnover of these commitments is £51.7 million, also shown in Table 7A.

- 4.18 The expected trade draw of these commitments is shown in Table 7B (Appendix 5). The trade draw percentages from each zone have been informed by existing shopping patterns calculated from the household survey results.

- 4.19 Convenience goods shopping patterns in 2025 have been re-assessed to reflect the implementations of commitments, as shown in Table 7B (Appendix 5). Commitments are expected to divert trade from facilities within and outside the Borough, as follows:

Zone 1 – Wandsworth	-£3.21 million;
Zone 2 – Putney	-£1.06 million;
Zone 3 – Roehampton	-£1.80 million;
Zone 4 – Tooting	-£0.34 million;
Zone 5 – Balham	-£2.09 million;
Zone 6 – Clapham Junction	-£16.53 million;
Zone 7 – VNEB/Clapham	-£5.79 million
Outside Borough	-£20.88 million.

- 4.20 Taking these commitments into account, available convenience goods expenditure has been projected forward to 2030, 2035 and 2040 in Tables 9, 10 and 11, and is summarised in Table 13 in Appendix 5. Convenience expenditure available to facilities within the Borough is expected to increase from £810.87 million in 2020 to £919.91 million in 2040.

- 4.21 Table 13 subtracts the turnover of existing and committed floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. The implementation of commitments is expected to result in a convenience goods expenditure deficit in 2025 of -£19.65 million, which will reduce to -£4.73 million in 2030. Continued expenditure growth creates a surplus of +£25.9 million in 2035, increasing to a surplus of £57.33 million in 2040.

- 4.22 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 14 (Appendix 5) and summarised in Table 4.2 overleaf. Surplus expenditure

is converted into floorspace estimates based on an assumed average sales density figure of £12,000 per sq.m, based on a generic average turnover density for main food supermarket operators. A net to gross ratio of 75% has been adopted.

Table 4.2 Convenience goods floorspace capacity (sq.m gross)

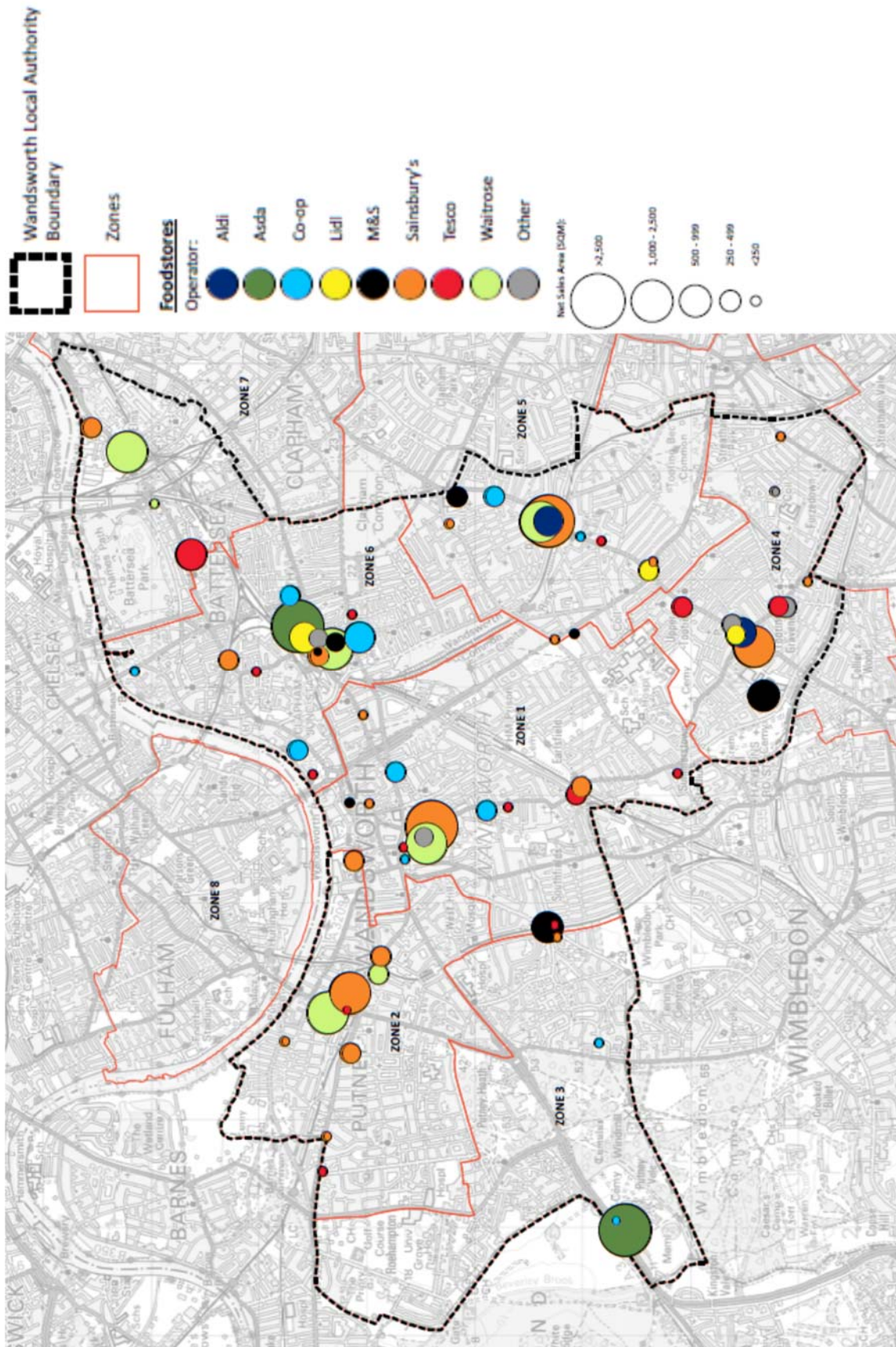
Area	2025	2030	2035	2040
Zone 1: Wandsworth	97	436	1,062	1,752
Zone 2: Putney	-41	8	256	556
Zone 3: Roehampton	-171	-93	68	256
Zone 4: Tooting	-3	178	710	1,306
Zone 5: Balham	-216	-4	683	1,267
Zone 6: Clapham Junction	-1,443	-1,051	-362	360
Zone 7: VNEB	-407	1	462	871
Total	-2,183	-525	2,878	6,370

Source: Table 14, Appendix 5

- 4.23 The surplus of available expenditure up to 2035 indicates that there is a long-term requirement for additional convenience goods floorspace in the Borough over and above commitments of 2,878 sq.m gross at 2035, increasing to 6,370 sq.m gross by 2040.
- 4.24 By way of comparison, the WRTCNA 2013 suggested a higher projection of 10,039 sq.m gross by 2029. The main reason for the decrease is Experian's expenditure projections. Previous forecasts suggested an 8.4% growth in expenditure per capita during the 17 year period between 2012 and 2029, but Experian's latest forecasts suggest a 0.3% reduction in expenditure per capita during the 20 year period between 2020 and 2040, due to higher growth in special forms of trading (SFT).

Qualitative need for convenience goods shopping

- 4.25 The retail capacity projections set out in Table 14 in Appendix 5 suggest the highest convenience goods expenditure surplus at 2035 relates to Wandsworth, Tooting and Balham. The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. The household survey results suggest 40.5% of respondents travel to do their main food shopping by car (both driver and passenger), compared with 30.4% for non-food shopping. Main food shopping by car has reduced significantly since the WRTCNA 2013, down from over 70% to 40.5%. This is due only in part to the increase in home delivery. The use of smaller convenience stores for more frequent food and grocery shopping trips has increased and less households appear to be undertaking bulk food shopping trips.
- 4.26 For households that still undertake bulk food shopping trips, the availability of a wide range of products and car parking are still important requirements. Large supermarkets or superstores remain the usual destination for these types of shopping trip. The distribution of the main food stores is shown overleaf. The full list of food stores and net sales areas are shown in Tables 12A and 12B in Appendix 5.
- 4.27 There are two food superstores (over 2,500 sq.m net sales area) and five other large food stores (1,000 to 2,500 sq.m net) within the Borough. These stores are suitable for bulk food shopping and are distributed across the Borough. In addition to these stores, there are food superstores just outside the Borough boundary, including four Sainsbury's superstores at Nine Elms, Clapham Common, Streatham and Colliers Wood and a Tesco Extra superstore at Streatham. These larger food stores are supported by many small supermarkets and convenience stores. All residents in the Borough have good access to food stores both within and outside the Borough.



- 4.28 The discount food sector is represented with Lidl stores in Balham, Clapham Junction and Tooting. Aldi is represented in Balham and Tooting. As indicated in the previous section, the discount food sector is growing, and Lidl is listed as having an additional requirement in Wandsworth Borough (source: The Requirements List – February 2020). Wandsworth Town appears to be the most obvious locational gap in discount food store provision.

Need for comparison goods floorspace

- 4.29 Table 6 in Appendix 6 shows future comparison goods expenditure patterns in 2025 based on constant market shares from 2020. Again, the implementation of retail commitments is expected to change future market shares.

- 4.30 The Wandsworth Local Plan Monitoring Report 2018/2019 and details of major proposals approved since 2019 have been used to identify loss and gains in comparison goods sales floorspace in each study area zone, and the results are summarised in Table 7A (Appendix 6). In total comparison goods sales floorspace is expected to increase by 25,255 sq.m net, primarily concentrated in commitments within the VNEB area. The expected net gain in turnover of these commitments is £220.04 million, also shown in Table 7A. The expected trade draw of commitments is shown in Table 7B (Appendix 6). The trade draw percentages from each zone are informed by existing shopping patterns based on the household survey results. Comparison goods shopping patterns in 2025 have been re-assessed to reflect the implementations of commitments, as shown in Table 7B (Appendix 6). Trade diversion estimates are based on the commitments trade draw assumptions in Table 7B, the amount of trade attracted to existing destinations from each zone (before commitments are implemented) and Lichfields' estimates of the propensity of commitments to compete with existing shopping facilities. Commitments are expected to divert trade from facilities within and outside the Borough, as follows:

Zone 1 – Wandsworth	-£9.50 million;
Zone 2 – Putney	-£0.60 million;
Zone 3 – Roehampton	-£0.08 million;
Zone 4 – Tooting	-£1.45 million;
Zone 5 – Balham	-£1.56 million;
Zone 6 – Clapham Junction	-£11.45 million;
Zone 7 – VNEB/Clapham	-£0.19 million;
Outside Borough	-£195.23 million.

- 4.31 Taking these commitments into account, available comparison goods expenditure has been projected forward to 2030, 2035 and 2040 in Tables 9, 10 and 11, and is summarised in Table 13 in Appendix 6. Comparison goods expenditure available to facilities within the Borough is expected to increase from £714.95 million in 2020 to £1,642.11 million in 2040.

- 4.32 Table 13 subtracts the turnover of existing and committed floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. The implementation of commitments is expected to result in a comparison goods expenditure deficit in 2025 of -£27.01 million, which will reduce to -£16.34 million in 2030. Continued expenditure growth creates a surplus of +£27.36 million in 2035, increasing to a surplus of £95.86 million in 2040.

- 4.33 The projected expenditure deficit at 2025 and 2030 could result in a combination of possible outcomes e.g. commitments will be slow to become fully occupied, existing vacant space is more likely to remain unlet and/or existing floorspace will not achieve the forecast 2.7% per annum

growth in sales densities. The latter does not necessarily mean a significant number of existing shops will be forced to close, but their future turnover growth may be lower than expected. These figures suggest a cautious approach to new comparison goods retail floorspace is required in the short to medium term.

4.34 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 14 (Appendix 6) and summarised in Table 4.3. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £7,000 per sq.m at 2020, which is projected to grow by 2.7% per annum up to 2040.

4.35 The surplus of available expenditure up to 2035 indicates that there is a long-term requirement for additional comparison goods floorspace in the Borough over and above commitments of 3,288 sq.m gross at 2035, increasing to 10,048 sq.m gross by 2040.

4.36 By way of comparison, the WRTCNA suggested a higher projection of 15,068 sq.m gross by 2029. The main reason for the decrease is Experian's higher growth in sales densities, i.e. more expenditure growth is absorbed by existing floorspace. Previous forecasts suggested a 1.8% p.a. growth in turnover efficiency up to 2029. This study adopts 2.7% p.a. based on Experian's latest forecast.

Table 4.3 Comparison goods floorspace capacity (sq.m gross)

Area	2025	2030	2035	2040
Zone 1: Wandsworth	-1,314	-1,040	302	2,094
Zone 2: Putney	-237	-331	-10	502
Zone 3: Roehampton	-325	-13	92	239
Zone 4: Tooting	-407	-345	191	892
Zone 5: Balham	-393	-317	167	676
Zone 6: Clapham Junction	-1,544	-1,064	196	1,716
Zone 7: VNEB	-3	874	2,340	3,929
Total	-4,222	-2,235	3,277	10,048

Source: Table 14, Appendix 6

Qualitative need for comparison goods shopping

4.37 An assessment of the shopping hierarchy is shown in Section 2 and a detailed analysis of shopping facilities within the main centres is shown in Appendix 3. Clapham Junction, Putney, Tooting and Wandsworth are similar in terms of the number of comparison shops and amount of retail sales floorspace. Balham is smaller in terms of comparison goods shopping, but as indicated earlier the centre's comparison retail floorspace appears to trade healthily.

4.38 Wimbledon town centre and retail parks at Colliers Wood are just to the south of the Borough boundary, and the King's Road is accessible from the north of the Borough. Together these centres/shopping destinations are accessible and provide a good choice of comparison shopping destinations.

4.39 These shopping destinations provide a good range of comparison shops, including many national multiples and independent specialists. The main centres within the Borough do not provide the same range and choice of comparison shopping facilities when compared with higher order shopping centres e.g. the West End, Kingston, Westfield and Croydon. Many residents with the Borough are likely to continue to shop outside the Borough. The regeneration of Battersea Power Station is expected to provide a new major comparison goods shopping destination that will be accessible to most residents within Wandsworth Borough.

- 4.40 The retail warehouse representation has decreased in the Borough. The bulky goods retail warehouse sector has stagnated during the last decade. Inner London has a decreasing number of retail warehouses, because these stores are a relatively inefficient use of high value land, where there is significant demand for high density mix use redevelopment.
- 4.41 Following this trend, the B&Q store at Wandsworth has been redeveloped and the Homebase store will close for redevelopment. Retail warehouse provision within the Borough is poor. However, residents have reasonably good access to retail warehouses in Merton, e.g. retail warehouses at Plough Lane and at Priory Retail Park and Tandem Retail Park at Colliers Wood.
- 4.42 Overall the accessibility for residents in the Borough to a range and choice of comparison goods shopping destination is excellent.

5.0 Other town centre uses

5.1 This section assesses the need for other main town centre uses including eating and drinking establishments (Class A3, A4 and A5) and commercial leisure i.e. cinema/multiplex, tennis bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, excludes less intensive sports and recreation uses such as swimming pools and sports pitches, and therefore the need for this uses has not been assessed in this study.

Food and beverage

5.2 As indicated in Section 2, the food/beverage sector continues to be fast moving and creative, with a steady flow of new concepts emerging, although growth has slowed in recent years. Within this sector there was a significant increase in the number of national multiple chains but recently some chains have experienced difficulties resulting in closures.

5.3 These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. As indicated in Section 2, demand for these uses has increased in town centres e.g. coffee shops and pub chains. Growth in Class A3-A5 uses within town centres is likely to continue in the future, as town centres seek to broaden their attraction in response to the increase in multi-channel shopping.

5.4 At present, the proportion of Class A3 uses within all five town centres in Wandsworth Borough are above the national average (9.9%). Balham (16.5%) and Clapham Junction (18%) have particularly high proportions of Class A3 use. The provision of Class A4 pubs/bars is generally below the national average (4.8%) with the exception of Clapham Junction (6.5%). The provision of Class A4 fast food/takeaway is relatively high in Wandsworth Town, but much lower in Clapham Junction and Putney.

5.5 Within the Local Centres and Important Local Parades in the Borough, there are 178 Class A3, A4 and A5 uses, of which 62% are Class A3 restaurant /cafés. The Borough has a high representation of restaurant and cafés, but a relatively poor provision of pubs/bars.

5.6 In total, there are 506 identified Class A3, A4 and A5 uses within the Borough. The recently completed Ram Quarter development in Wandsworth Town and emerging developments in the VNEB area should significantly increase food/beverage provision.

5.7 Experian's latest 2018 local expenditure figures have been adopted. Food and beverage expenditure per capita projections are shown in Table 2 in Appendix 7.

5.8 Total food and beverage expenditure is shown in Table 3 in Appendix 7, based on population figures in Table 1 and average expenditure in Table 2. Food and drink expenditure within the study area as a whole is expected to increase from £1,155 million in 2020 to over £1,619 million in 2040, an increase of over 40%. Approximately half of this is due to growth in population (i.e. more potential customers living locally) and the other half due to national forecast growth in expenditure per person (i.e. each customer spending more).

Base year food/beverage patterns

5.9 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2020) penetration rates are shown in Table 4 in Appendix 7 and expenditure patterns are shown in Table 5.

5.10 Wandsworth Borough's market share of all expenditure within the study area (excluding expenditure inflow) is about 44%. Allowing for expenditure inflow, Wandsworth Borough

existing facilities attract £546.75 million. As indicated above, there are 506 food/beverage outlets in designated Town, Local Centres and Important Local Parades in the Borough. Large good quality restaurant/bars would be expected to achieve a turnover of at least £1 million. Food and beverage facilities in Wandsworth Borough appear to be trading healthily.

Capacity for food/beverage floorspace

- 5.11 Table 6 in Appendix 7 shows future food/beverage expenditure patterns in 2025 based on constant market shares from 2020. The implementation of commitments is expected to change future market shares.
- 5.12 The Wandsworth Local Plan Monitoring Report 2018/2019 and details of major proposals approved since 2019 have been used to identify loss and gains in food/beverage floorspace in each study area zone, and the results are summarised in Table 7A (Appendix 7). In total food/beverage floorspace is expected to increase by 39,333 sq.m, primarily concentrated in commitments within the VNEB area and at the Ram Quarter in Wandsworth. The expected net gain in turnover of these commitments is £236 million, also shown in Table 7A.
- 5.13 The expected trade draw of these commitments is shown in Table 7B (Appendix 7). The trade draw percentages from each zone have been informed by existing shopping patterns calculated from the household survey results.
- 5.14 Food/beverage expenditure patterns in 2025 have been re-assessed to reflect the implementations of commitments, as shown in Table 7B (Appendix 7). Commitments are expected to divert trade from facilities within and outside the Borough, as follows:
- | | |
|---------------------------|-------------------|
| Zone 1 – Wandsworth | -£17.25 million; |
| Zone 2 – Putney | -£4.71 million; |
| Zone 3 – Roehampton | -£0.04 million; |
| Zone 4 – Tooting | -£6.49 million; |
| Zone 5 – Balham | -£7.45 million; |
| Zone 6 – Clapham Junction | -£12.89 million; |
| Zone 7 – VNEB/Clapham | - £0.23 million; |
| Outside Borough | -£186.94 million. |
- 5.15 Taking these commitments into account, available food/beverage expenditure has been projected forward to 2030, 2035 and 2040 in Tables 9, 10 and 11, and is summarised in Table 13 in Appendix 7. Food/beverage expenditure available to facilities within the Borough is expected to increase from £546.75 million in 2020 to £1,001.66 million in 2040.
- 5.16 Table 13 subtracts the turnover of existing and committed floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. The implementation of commitments is expected to result in a food/beverage expenditure deficit in 2025 of -£46.7 million, which will reduce to -£25.78 million in 2030. Continued expenditure growth creates a small surplus of +£8.51 million in 2035, increasing to a surplus of +£46.56 million in 2040.
- 5.17 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 14 (Appendix 7) and summarised in Table 5.1. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £6,000 per sq.m at 2020, which is projected to grow by 1% per annum up to 2040.

Table 5.1 Food/beverage floorspace capacity (sq.m gross)

Area	2025	2030	2035	2040
Zone 1: Wandsworth	-2,119	-1,741	-495	529
Zone 2: Putney	-395	-190	322	934
Zone 3: Roehampton	14	24	50	82
Zone 4: Tooting	-789	-364	433	1,286
Zone 5: Balham	-974	-643	-2	561
Zone 6: Clapham Junction	-1,604	-1,053	-433	216
Zone 7: VNEB	-1,539	-193	1,347	2,752
Total	-7,406	-3,890	1,221	6,360

Source: Table 14, Appendix 7

- 5.18 The surplus of available expenditure up to 2035 indicates that there is a long-term requirement for additional food/beverage floorspace in the Borough over and above commitments of 1,221 sq.m gross at 2035, increasing to 6,360 sq.m gross by 2040.

Other Class A1 and A2 service uses

- 5.19 The retail, food and drink floorspace projections do not include non-retail Class A1 services or Class A2 services. Based on the Goad national average, one would expect around 25% of shop premises to be occupied by these uses within centres.
- 5.20 The published list of operator's space requirements (source: The Requirement List – February 2020) suggests there is some current demand from A1 and A2 service operators with nine listed requirements. This list includes three hair/beauty outlets, pet grooming, vape store, shoe repairs and Metro Bank.
- 5.21 The proportion of Class A1 and Class A2 services in the five main town centres is slightly higher (26%) than the national average. Balham has the highest provision (34%), followed by Putney (31%). Given the current reasonable provision of Class A1/A2 service uses in the Borough, including local centres, new town centre development within the Borough should provide around 15% of floorspace for these uses.

Commercial leisure

- 5.22 Residents in Wandsworth have relatively good access to range of commercial leisure and entertainment, including facilities in neighbouring Boroughs (good access by car) and Central London (good access by public transport). Most of the key sectors are represented. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres, ice rinks and family entertainment centres require a large catchment population, and often benefit from clustering together on leisure parks. They are usually less accessible by public transport.
- 5.23 Wandsworth Borough has a large catchment population but the proximity of major leisure facilities in surrounding local authorities will influence the potential for major commercial leisure facilities within the Borough.

Cinemas

- 5.24 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 177.0 million in 2018 (Source: British Film Institute). Cinema trips have

not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.4 million). The national average visitation rate is about 2.7 trips per person per annum.

5.25 The Cinema Advertising Association identifies 771 cinema facilities with 4,115 screens. Lichfields' national CINESCOPE model identifies approximately 800,000 cinema seats in the UK. The CINESCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 40,000 cinema trips per screen per annum or 210 trips per seat per annum. The existing cinema provision in the Borough is 22 screens and 3,465 seats, as follows (Source: UKcinemas.org.uk):

Archlight, Battersea	3 screens (131 seats);
Odeon Luxe, Putney	3 screens (331 seats);
Backyard Cinema (temporary use), Wandsworth	2 screens (280 seats); and
Cineworld, Wandsworth	14 screens (2,723 seats).

5.26 Residents in the Borough also have access to 28 main cinemas in central London. Cinemas within neighbouring boroughs that also serve parts of the study area include Odeon cinemas in Richmond (7 screens) and Wimbledon (12 screens); Picturehouse cinemas in Fulham Road (6 screens) and Clapham (4 screens); and the Ritzy cinema in Brixton (5 screens).

5.27 The population within the Wandsworth study area (Zones 1-8) in 2020 (554,605 people) would generate around 1,497,000 cinema trips per annum, based on the national average visitation rate (2.7 trips per annum). Experian's local expenditure data indicates the study area generates £23 million on cinema trips. Adopting the national average population per cinema screen (40,000 trips per screen), implies that 1,497,000 trips generates demand for 37 cinema screens. In terms of seats, the national average (210 trips per seat) suggests 1,497,000 trips could support around 7,129 seats.

5.28 British Film Institute information suggests the participation rate for visiting cinemas is 52% for adults in the UK. The Wandsworth household survey results suggest a higher participation of 66% for household across the study area. These figures suggest a higher average of 3.4 trips per person could be adopted in Wandsworth study area, generating 1,885,000 trips in 2020.

5.29 The Wandsworth household survey results suggest Wandsworth Borough market share of cinema trips in the study area is 42% in 2020. Cinema capacity is shown in Table 5.2.

Table 5.2 Cinema Potential in Wandsworth Borough

	2020	2025	2030	2035	2040
Population (Zones 1-8)	554,605	567,115	580,638	601,908	622,856
Total cinema trips	1,885,000	1,928,000	1,974,000	2,046,000	2,118,000
Wandsworth Borough's market share of trips	42%	42%	42%	42%	42%
Total trips attracted to Wandsworth Borough	791,700	809,800	829,200	859,500	889,400
Cinema Screen Potential	19.8	20.2	20.7	21.5	22.2
Cinema Seat Potential	3,770	3,856	3,948	4,093	4,235
Existing Screen Provision	22	22	22	22	22
Existing Seat Provision	3,465	3,465	3,465	3,465	3,465

5.30 The analysis above suggests there is limited potential for additional permanent cinema's in Wandsworth Borough based on a trips per screen basis. However, there is theoretical scope for

770 additional cinema seats based on a trips per seat analysis. There could be potential for part time cinema, similar to the Backyard Cinema.

Theatres

- 5.31 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (223) presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue is £5.7 million. The UK average attendance per performance is 545.
- 5.32 Experian's local expenditure data indicates the study area generates £42 million on live theatre, concerts and shows. Based on the average ticket revenue per venue (£5.7 million) the study area population generates demand for 7.4 venues.
- 5.33 The household survey indicated 46% of respondents in the study area visit theatres. In total 80 different theatre destinations were identified by respondents, reflecting the significant choice in London including the West End. Only two theatre destinations were mentioned by respondents in Wandsworth Borough, as follows:
- Battersea Arts Centre, Lavender Hill, Battersea (attracting 2.1% of theatre goers); and
 - Putney Arts Theatre, Ravenna Road, Putney (attracting 0.3% of theatre goers).
- 5.34 The Tara Arts Theatre, Earlsfield and Theatre 503, Battersea Park Road were not mentioned in the survey. The household survey results suggest the retention of theatre trips within the study area is relatively low.
- 5.35 The close proximity of Wandsworth Borough to Central London and existing provision suggest there is limited demand for additional theatre facilities in the Borough. The relatively short journey to Central London will help meet the Borough's need for high profile, national performances. There is no clear need for additional theatre provision in the Borough.

Health and fitness clubs

- 5.36 The 2019 State of the UK Fitness Industry Report reveals that the UK health and fitness industry is continuing to grow. There are now more than 10 million fitness members in the UK and the industry is worth £5 billion, and the penetration is now 15.6%. The sector has more clubs, more members and a greater market value than ever before. The 2019 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2019, with an increase of 4.71% in the number of memberships and 2.9% growth in the number of facilities.
- 5.37 The Sport England/Active Places data indicates that there are 44 registered health and fitness suites in the Borough, with 2,871 fitness stations. Twelve of these facilities are for private use/sports club/community association use only (263 fitness stations). The remaining 32 registered facilities are open to the general public (including registered members) and have 2,608 fitness stations in total. The largest facilities (over 50 stations), as shown in Table 5.3.
- 5.38 The current study area population is 554,605 (2020). The household survey results suggest the health and fitness club participation rate is about 37%. Wandsworth Borough market share of health and fitness trips is 55%, suggesting a health and fitness catchment population of 305,000 in 2020. This population estimate indicates that Wandsworth Borough has 9.4 fitness stations per 1,000 people (2,871 stations in total).

Table 5.3 Wandsworth Borough health and fitness suites

Name	Type	No. Fitness Stations
Pure Gym, Wandsworth	Registered Membership use	220
The Gym, Southfields	Registered Membership use	215
Nuffield Health, Wandsworth Southside	Registered Membership use	185
The Gym, Tooting	Registered Membership use	170
Pure Gym, Putney	Pay and Play	163
The Gym, Wandsworth	Pay and Play	120
Fitness First Health Club, Clapham	Registered Membership use	114
Putney Leisure Centre	Pay and Play	110
Daley fitness, Putney	Registered Membership use	100
Yorky's Gym, Graveney	Pay and Play	90
Virgin Active, Wandsworth Smugglers Way	Registered Membership use	86
Balham Leisure Centre	Pay and Play	82
Fitness First Health Club, Balham	Registered Membership use	80
Physical Culture Gymnasium, Putney	Registered Membership use	80
Fitness First Health Club, Clapham Junction	Registered Membership use	73
Latchmere Leisure Centre	Pay and Play	70
Nuffield Health, Wandsworth	Registered Membership use	70
Tooting Leisure Centre	Pay and Play	65
Anytime Fitness, Tooting	Registered Membership use	60
Nuffield Health, Battersea	Registered Membership use	60
Roehampton Club	Registered Membership use	50

Source: Active Places, January 2020

- 5.39 Greater London has 933 Sport England registered health and fitness suites with 65,994 fitness stations (average of 70 stations per facility). This existing provision equates to about 7.5 fitness stations per 1,000 people in London. Wandsworth Borough's catchment population has a higher provision of fitness stations (9.4 per 1,000 people) than the London average (7.5 stations). This higher provision in Wandsworth Borough may be due to net in-commuting and work-related linked trips and/or the demographic profile of the Borough.
- 5.40 Growth in population between 2020 and 2040 in the study area is +68,251 people. This additional population could support 512 fitness stations based on the Greater London average or 642 fitness stations based on the Wandsworth Borough average. Assuming Wandsworth Borough's share of this growth is 55% (based on the household survey results) then there is scope for 4 to 5 (average 70 stations) additional health and fitness facilities in the Borough by 2040.
- 5.41 The published list of operator's space requirements (source: The Requirement List – February 2020) suggests there is strong current demand from health and fitness operators with 11 listed requirements. Operator demand is highest in Balham (6 requirements), Clapham/Battersea (6) and Putney (5).

Tenpin bowling

- 5.42 There are no major tenpin bowling facilities in Wandsworth Borough. The household survey results suggest that 11.3% of households in the study area visit tenpin bowling facilities, which is a relatively low participation rate based on Lichfields' recent experience. Of those who visit bowling facilities the main destinations are: Hollywood Bowl in Tolworth (15%), followed by Tenpin in Croydon (8%), Tenpin in Kingston (8%) and All Star Lanes, Westfields White City (5%).

5.43 The current study area population is 554,605 (2020) could theoretically support 46 lanes, based on one lane per 12,000 people (national average). Population growth within the study area between 2020 and 2040 (+68,251 people) could support a further 5-6 lanes by 2040.

5.44 There is theoretical potential to development a tenpin bowling facility within the Borough, perhaps as part of a major mixed use development.

Bingo, games of chance and gambling

5.45 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

5.46 The Gambling Commission indicates there are 650 bingo facilities in Great Britain (2018) and 152 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults. The adult (over 18) population in the Wandsworth Borough at 2020 is 265,000, which could in theory support 3 bingo facilities and potentially one casino. The household survey results indicate that less than 3% of households in the study area visit bingo facilities, compared with the national average participation rate of around 5%.

5.47 Of these, most (59%) visited Buzz Bingo in Tooting. The Mecca bingo in Wandsworth has closed since the previous study. This recent closure and the low participation rate in the study area suggests there is limited scope for additional bingo facilities within the Borough in the short term. Population growth within the study area between 2020 and 2040 (+68,251 people) could support a further bingo facility, subject to operator demand for a new facility.

5.48 The household survey results indicate that only 4% of households in the study area visit bookmakers. The Borough's Town and Local Centres and Important Local Parades currently have 37 betting shops/casinos/amusements centres. The provision of betting shops in the five main centres is 22 betting shops or 3.4% of non-retail services, which is consistent with the Goad national average for town centres. The current adequate provision and the low participation rate in the study area suggests there is limited scope for additional gambling facilities within the Borough in the short term, however population growth may generate additional demand in the long-term but there is no need to allocate sites for these uses at this stage.

Trampoline centres

5.49 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce on 31 May 2014.

5.50 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms.

5.51 The household survey results indicate that over 15% of households in the study area visit trampoline park facilities, much higher than the participations rates for tenpin bowling and

bingo facilities. Of the participating households, most (70%) visited Flipout in Wandsworth. This sector is still relatively new and its potential for continued growth is unclear. The Flipout in Wandsworth is centrally placed to serve the Borough, but this use will be lost when the site is redeveloped. Additional provision within town centres could be considered. The future strategy should be flexible to respond to any emerging opportunities.

Community uses

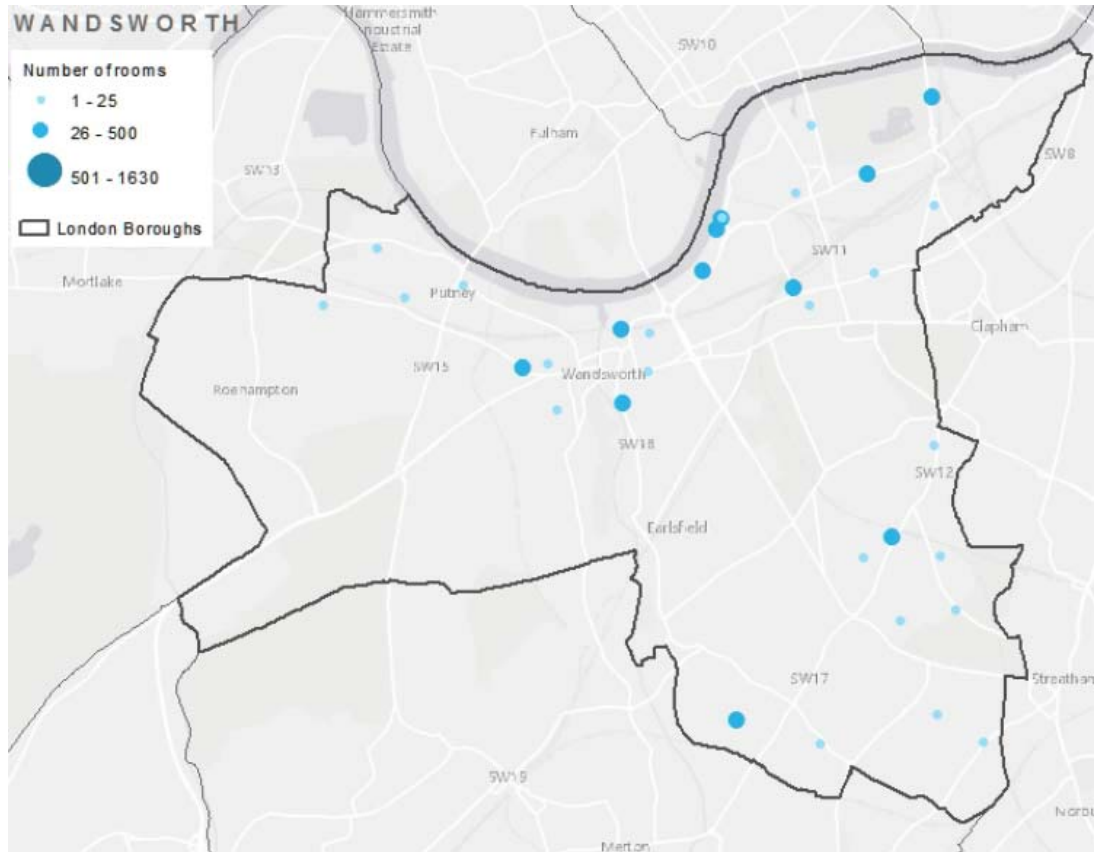
- 5.52 Class D1 community uses such as libraries, halls, museums and religious institutions account for less than 7% of existing town centre floorspace based on Goad Plan data. Within Wandsworth five main town centres less than 3% of floorspace is occupied by Class D1 uses.
- 5.53 The household survey results indicate that around 55% of households in the study area visit museums or art galleries. These respondents mentioned over 40 different destinations, including many within central London. Battersea Arts Centre was mentioned by only 5 respondents.
- 5.54 There are 12 libraries distributed throughout the Wandsworth Borough. Wandsworth Borough's population is expected to increase by about 12% by 2040. Based on current provision, 1-2 new libraries could be required to serve new residential areas.
- 5.55 The household survey results included questions relating to improvements that would make respondents shop in town centres more often. These results did not highlight significant deficiencies in community facilities. Less than 1% of respondents mentioned more play centres or more toilets. The business survey results also did not highlight issues relating to the absence of community facilities.
- 5.56 There are 32 registered community centres, halls and clubrooms in Wandsworth Borough. Based on current provision, 4 new community centres/halls could be required to serve new residential areas.
- 5.57 Future mixed developments within town centres, should seek to include appropriate accommodation for new community and cultural uses.

Hotels

- 5.58 The UK hotel market represents a significant part of the leisure economy, and this is particularly evident in London. British residents alone spent £23.7 billion on overnight trips within Great Britain in 2017 (source: Visit England), an increase of £4.2 billion since 2012. The GLA Economics Paper "Projections of demand and supply for visitor accommodation in London to 2050" (April 2017) indicated London attracted over 31.5 million over-night visitors in 2015, 41% domestic and 59% international. The total number of visitor nights was 138.5 million nights. The GLA's economic paper projects over-night stays will increase to 196.4 million in 2041, an increase of 42% (1.4% per annum).
- 5.59 The latest available data for Visit England's serviced accommodation audit (2016) shows that there were 33,374 serviced accommodation establishments registered with national tourist boards, which provide 1.8 million bed spaces. The GLA's economic paper suggests London has 145,737 serviced rooms in 2015, which equates to about 8% of the total provision in England. Most of the London rooms are in central London, only 1,393 of which are located in Wandsworth Borough (just under 1% share of London's total).
- 5.60 The latest available data from Visit England on occupancy rates (February 2019) is 73% for room occupancy (up from 67% in July 2013) and 52% bed space occupancy (up from 51% in July 2013) in hotels in England. For city/large town locations, including hotels, guesthouses and

- B&Bs, the average room occupancy is 74%, compared to 68% in small towns, 61% in the countryside and 70% in seaside locations. Bed space occupancy in city/large town locations was 52% over the same period.
- 5.61 The Visit England data shows that occupancy rates have increased over the period from 2010, when room occupancy over a 12-month period in city/large town locations was 69%, 55% in small towns, 52% in the countryside and 54% in seaside locations. In London, room occupancy in 2018 was recorded at 77%, compared with 78% in 2017. The GLA's economic paper describes occupancy rates in London as "tight", suggesting higher levels of occupancy than other parts of England.
- 5.62 The New London Plan seeks to enhance and extend London's visitor attractions, cultural infrastructure, night-time economy, convention facilities and accommodation. These accommodation and tourist attractions are expected to be focused in the London CAZ and town centres outside the CAZ. Growth in these sectors should provide further opportunities to diversify uses within town centres, including the repurposing or redevelopment of any surplus retail space.
- 5.63 A recent trend in tourism has been the growth of non-serviced accommodation. Non-serviced accommodation is typically that in which private properties are rented to visitors. Most notably, the rise of Airbnb as a service enabling homeowners to rent out all or part of their property provides visitors with a different option to traditional hotels. Research by Colliers International "Airbnb in London" (2017) confirms overnight stays booked with Airbnb in London rose by a 130% from just over 2 million in 2015 to 4.62 million in 2016. Furthermore, nearly 9% of overnight visitors to London made use of Airbnb for their accommodation, up from nearly 4% in 2015. Nearly half the bookings were within five inner London Boroughs, including Kensington and Chelsea. In relation to Wandsworth Borough specifically, the Borough was in the second highest category with between 100,000 to 300,000 bookings in 2015, along with Lambeth. Richmond was in the next category (50,000 to 100,000 bookings) and Merton was in the 20,000 to 50,000 category.
- 5.64 Seven of the 10 hotels are part of chains. Premier Inn dominates the chain market with three hotels in the Borough, with Travelodge and Ibis both having two hotels in the Borough. Provision is focused towards lower-end / budget hotels, with no 4-5 star hotels.
- 5.65 Figure 5.1 provides an extract from the GLA Economics Paper showing the distribution of hotel accommodation in Wandsworth Borough.
- 5.66 The GLA Economics Paper projects that London will require an additional 58,140 serviced accommodation rooms by 2041, the net requirement over and above commitments from 2015. This is the equivalent to 2,236 net additional rooms per year. Wandsworth Borough was projected to provide 688 additional rooms by 2041 (1.2% of the London total).

Figure 5.1 Hotel accommodation in Wandsworth Borough (2015)



Source: GLA Economics Paper "Projections of demand and supply for visitor accommodation in London to 2050" (April 2017)

5.67

Based on the GLA figures, there is a clear need for additional hotel rooms in Wandsworth Borough over the study period.

6.0 Accommodating growth

Introduction

- 6.1 The National Planning Policy Framework (NPPF, 2019) indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres, for at least 10 years. To accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. The NPPF indicates local planning authorities should apply a sequential approach for development.
- 6.2 There are several issues that influence the scope for new floorspace and the appropriate location for this development, as follows:
- major retail developments in competing centres;
 - the re-occupation of vacant retail/leisure floorspace;
 - the availability of land to accommodate new development;
 - the reliability of long-term expenditure projections beyond 2030 due to greater margins of error;
 - the implications of the coronavirus crisis and the speed of recovery from this;
 - the effect of internet/home shopping on the demand for retail/leisure property;
 - the level of operator demand for floorspace in lower tier centres, recognising the polarisation of investment within larger centres; and
 - the ability to maintain existing market share of expenditure in the future in the face of increasing competition.
- 6.3 The expenditure projections in this study take account of home shopping made through non-retail businesses, because special forms of trading have been excluded. The study update adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.
- 6.4 The assessment of the potential for new retail, food/beverage floorspace within the previous sections suggests there is only a long term scope for new development, including as an element of residential or employment led mixed use development within Wandsworth Borough, because short to medium term growth is expected to be absorbed by the implementation of commitments and increases in turnover efficiencies. This section examines the opportunities for accommodating long term projected growth and assesses potential to accommodate this floorspace within vacant floorspace, proposed commitments and other emerging mixed use developments.
- 6.5 Tables 6.1 and 6.2 below summarise the floorspace requirements in Wandsworth Borough up to 2035 and 2040, over and above commitments. Figures for 2030 have not been provided because the floorspace projections are predominantly negative, with the implementation of commitments exceeding projected demand.
- 6.6 Table 5.1 indicates there is combined scope for 7,925 sq.m gross of new Class A1 and A3-A5 floorspace up to 2035, over and above the expected implementation of planned commitments. By 2040 it is projected this potential requirement increases to 23,280 sq.m gross over and above commitments.

Table 6.1 Summary of Class A1, A3 to A5 floorspace requirements up to 2035 (sq.m gross)

Zone	A1 Convenience (sq.m gross)	A1 Comparison (sq.m gross)	A3-A5 Food/beverage (sq.m gross)	Total (sq.m gross)
Zone 1 - Wandsworth	1,062	302	-495	869
Zone 2 – Putney	256	-10	322	567
Zone 3 - Roehampton	68	92	50	210
Zone 4 – Tooting	710	191	433	1,334
Zone 5 – Balham	683	167	-2	848
Zone 6 – Clapham Junction	-362	196	-433	-599
Zone 7 – VNEB/Clapham	462	2,340	1,347	4,148
Total	2,878	3,277	1,221	7,376

Source: Table 14, Appendix 5; Table 14, Appendix 6; and Table 14, Appendix 7. (Totals may not add due to rounding).

Table 6.2 Summary of Class A1, A3 to A5 floorspace requirements up to 2040 (sq.m gross)

Zone	A1 Convenience (sq.m gross)	A1 Comparison (sq.m gross)	A3-A5 Food/beverage (sq.m gross)	Total (sq.m gross)
Zone 1 – Wandsworth	1,752	2,094	529	4,375
Zone 2 – Putney	557	502	934	1,993
Zone 3 – Roehampton	256	239	82	576
Zone 4 – Tooting	1,306	892	1,286	3,484
Zone 5 – Balham	1,267	676	561	2,504
Zone 6 – Clapham Junction	360	1,716	216	2,504
Zone 7 – VNEB/Clapham	871	3,929	2,751	7,552
Total	6,370	10,048	6,360	22,777

Source: Table 14, Appendix 5; Table 14, Appendix 6; and Table 17, Appendix 7. (Totals may not add due to rounding).

- 6.7 These projections assume Wandsworth Borough (post the implementation of commitments) can maintain its market share of expenditure within the study area. This approach recognises that additional development within the Borough should help to increase the Borough's market share, but this increase will be counter-balanced by development within surrounding Boroughs. A balanced and sustainable approach has been adopted.

Strategy for accommodating growth

- 6.8 The sequential approach suggests that designated town centres should be the first choice for retail, leisure and main town centre uses. In the case of Wandsworth Borough designated centres include town and local centres. In considering this important issue the following factors have been assessed:
- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
 - Is the nature and scale of development likely to serve a wide catchment area extending beyond a localised area?
 - Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?

- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?
- 6.9 Some forms of retail or leisure facilities, which serve more localised catchment areas, may be more appropriate within local centres, rather than the main centres. However, development should if possible be appropriate in terms of scale and nature to the centre in which it is located.
- 6.10 The existing stock of premises should have a role to play in accommodating projected growth. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.
- 6.11 There are 232 vacant shop units within the designated centres and parades in the Borough, an average vacancy rate of about 10.9%, which is just below the Goad national average (12.4%). The amount of vacant floorspace is about 33,800 sq.m gross. The vacancy rate is only slightly lower (9.7%) within the five main town centres.
- 6.12 Based on Lichfields' experience the healthiest centres generally have a vacancy rate of around 5%, because there will always be an element of vacancies, reflecting the normal churn of occupiers. Vacant premises within Wandsworth Borough should help to accommodate growth. If the existing vacancy rate reduced to 5% in the main town centres and to 8% in the local centres and parades, then there could be potential for re-occupied vacant space to accommodate the following new floorspace:
- Balham 3,000 sq.m gross (14 re-occupied units)
 - Clapham Junction 200 sq.m gross (2 re-occupied units)
 - Putney 4,800 sq.m gross (23 re-occupied units)
 - Tooting 2,100 sq.m gross (17 re-occupied units)
 - Wandsworth 3,100 sq.m gross (8 re-occupied units)
 - Local Centres 2,200 sq.m gross (27 re-occupied units)
 - Important Local Parades 1,000 sq.m gross (12 re-occupied units)
- 6.13 Based on this assumed reduction in shop vacancy rates, reoccupied vacant units in total could accommodate up to 16,400 sq.m gross. Less than half this reduction in vacant units/space would be required to accommodate all of the combined Class A1 to A5 floorspace projection for Wandsworth Borough up to 2035 (7,376 sq.m gross). If the reduction in vacant units can be achieved by 2040, then about 70% of the overall Class A1 to A5 floorspace projection for Wandsworth Borough (22,777 sq.m gross) could be accommodated, leaving a residual projection of only 6,400 sq.m gross. These figures assume all Class A1 to A5 commitments will be delivered and occupied in addition to the occupation of vacant space.
- 6.14 Many (100 out of 232, 43%) of the existing vacant units are in Local Centres and Important Local Parades. These vacant units are generally small (less than 100 sq.m gross) and in secondary locations. These units may be more attractive for convenience retail and non-retail service uses catering for localised catchment areas, rather than comparison goods shopping which generally draws from a wider catchment area. The five main centres are likely to remain the focus for Class A1 comparison retail use and large scale leisure/entertainment/cultural uses. Vacant premises within Local Centres and Important Local Parades should still provide opportunities to accommodate non-retail services catering for the needs of local communities.
- 6.15 Whilst prioritising the reoccupation of vacant units within designated centres and parades, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required, ideally

within designated centres/parades to accommodate some future investment opportunities. In terms of viability, this is likely to be higher density mixed use development, probably with residential on upper floors.

Spatial strategy

- 6.16 Retail and leisure growth should be focused in the main town centres where there are the best prospects for attracting investment. This is consistent with the approach set out in the existing development plan and the NPPF.
- 6.17 The potential opportunities to accommodate future floorspace requirements for retail and food/beverage uses identified in the capacity assessment are outlined below. The floorspace required for other town centre uses has not been quantified because of the fragmented nature of these sectors and the less direct link between demand and floorspace e.g. leisure, tourism, cultural and community uses. In line with the need assessment for these uses in Section 4, vacant floorspace and redevelopment opportunities within designated centres should provide opportunities for other main town centre uses, particularly on upper floors. The distribution of town and Local Centres and Important Local Parades is shown in Appendix 2.

Zone 1 - Wandsworth

- 6.18 Zone 1 includes Wandsworth Town Centre, Earlsfield and Southfield Local Centres. There are five Important Local Parades within this zone. As a main retail and leisure destination in the Borough, it is appropriate for a significant proportion of retail and town centre growth to be directed to Wandsworth Town Centre, to strengthen its role, in particular, comparison goods retail, food/beverage, leisure and evening economy uses.
- 6.19 Several major mixed-use developments are expected to deliver new commercial floorspace within or near the town centre. Floorspace still available within the Ram Quarter development is expected to deliver around 2,300 sq.m of Class A1 floorspace and 4,100 sq.m of Class A3-A5 of food/beverage floorspace. The capacity figures also take account the redevelopment of the B&Q and Homebase stores for mixed use development. The residual floorspace capacity projections for Class A retail/food and beverage uses, over and above these commitments are shown in Table 6.3 below.

Table 6.3 - Wandsworth Zone 1 floorspace projections (sq.m gross)

Use class/type	2025	2030	2035	2040
A1 Convenience	97	436	1,062	1,752
A1 Comparison	-1,314	-1,040	302	2,094
A3 – A5 Food and Beverage	-2,119	-1,471	-495	529
Total	-3,336	-2,075	869	4,375

- 6.20 The floorspace capacity projections suggest commitments (including vacant space at the Ram Quarter) will absorb all growth for food/beverage uses up to 2035, with a small deficit of -495 sq.m gross. There is limited residual food/beverage capacity (529 sq.m) at 2040.
- 6.21 The projected over-supply at 2025 and 2030 could result in a combination of possible outcomes e.g. commitments will be slow to become fully occupied, existing vacant space is more likely to remain unlet and/or existing floorspace will not achieve the forecast growth in sales densities. The latter does not necessarily mean a significant number of existing shops will be forced to close in Zone 1, but the figures suggest a cautious approach to new comparison goods and food/beverage is required in the short to medium term.

- 6.22 The short to medium term prospects for a significant reduction in the vacancy rate appears to be poor. Excluding the Ram Quarter, Wandsworth Town Centre, Earlsfield and Southfield Local Centres have 26 vacant units (about 6,900 sq.m). The vacancies rates in Earlsfield and Southfield are relatively low (below 8%), but if the vacancy rate in Wandsworth Town was to reduce to 5% in the longer term then 3,100 sq.m could be reoccupied.
- 6.23 Most (up to 70%) of the combined residual capacity (4,375 sq.m gross) for A1 retail and food/beverage floorspace at 2040 can theoretically be accommodated in vacant floorspace in Wandsworth Town Centre, based on realistic reductions in the vacancy rate. The vacant Debenhams unit provides a significant opportunity. At present, there is no clear need to identify major retail or leisure led development allocations within Zone 1. The future priority in this zone should be the delivery/successful occupation of commitments and re-occupation of existing vacant units within Wandsworth Town.
- 6.24 The comparison goods projection (2,094 sq.m gross) is likely to be focused in Wandsworth Town Centre. Wandsworth Town appears to be the most obvious locational gap in discount food store provision, with Lidl a potential operator that could meet the residual capacity. Other convenience floorspace is likely to be small scale accommodated in local centres or parades. Large mixed uses developments may include a small element of convenience goods retail and services to cater for the local needs of the development.

Zone 2 - Putney

- 6.25 Zone 2 includes Putney Town Centre and four Important Local Parades. There are no major planned commitments within Zone 2, with floorspace net gains and losses generally cancelling each other out. The residual floorspace capacity projections for Class A retail/food and beverage uses are shown in Table 6.4 below.

Table 6.4 – Putney Zone 2 floorspace projections (sq.m gross)

Use class/type	2025	2030	2035	2040
A1 Convenience	-41	8	256	557
A1 Comparison	-237	-331	-10	502
A3 – A5 Food and Beverage	-395	-190	322	934
Total	-673	-513	567	1,993

- 6.26 There is a small projected over-supply at 2025 and 2030, which suggest a cautious approach to new retail and food/beverage is required in the short to medium term.
- 6.27 Putney Town Centre has 38 vacant units (about 7,800 sq.m). As in other zones, the short to medium term prospects for a significant reduction in the vacancy rate appears to be poor. In the longer term, if the vacancy rate in Putney reduced to 5% then 4,800 sq.m could be reoccupied.
- 6.28 The combined long term capacity (1,993 sq.m gross) for A1 retail and food/beverage floorspace at 2040 can theoretically be accommodated in vacant floorspace in Putney Town Centre, even based on a modest reduction in the vacancy rate. The future priority in this zone should be the re-occupation of vacant units within Putney Town Centre by a mix of convenience, comparison retail and non-retail services.

Zone 3 - Roehampton

- 6.29 Zone 3 includes Roehampton Local Centre, six Important Local Parades and the freestanding Asda superstore. The redevelopment of the Danebury Avenue area of Roehampton Local Centre as part of the Alton Estate regeneration is expected to result in a small net increase in retail floorspace. The Beaumont Road parade is also being redeveloped. A replacement Sainsbury's

Local store is the other major planned commitment within Zone 3. The residual floorspace capacity projections for Class A retail/food and beverage uses are shown in Table 6.5 below.

Table 6.5 – Roehampton Zone 3 floorspace projections (sq.m gross)

Use class/type	2025	2030	2035	2040
A1 Convenience	-171	-93	68	256
A1 Comparison	-325	-13	92	239
A3 – A5 Food and Beverage	14	24	50	82
Total	-482	-82	210	576

- 6.30 There is a small projected over-supply at 2025 and 2030, which suggest a cautious approach to new retail and food/beverage is required in the short to medium term.
- 6.31 The combined long term capacity (576 sq.m gross) for A1 retail and food/beverage floorspace at 2040 is relatively insignificant. Important Local Parades within the west of Zone 3 are small and provide a limited range of shops and services, i.e. Petersfield Rise, Portswood Place and Rockingham Close, but there were no vacant units recorded in these parades.
- 6.32 The future priority in this zone should be the successful implementation of the Alton Estate regeneration and the re-occupation of vacant units in the rest of Roehampton Local Centre. Elsewhere in Zone 3, any emerging mixed use developments that include an element of local shops and services could be encouraged in areas that are currently poorly served, subject to compliance with the sequential and impact tests.

Zone 4 – Tooting

- 6.33 Zone 4 includes Tooting Town Centre, Mitcham Lane and three Important Local Parades. There are no major planned retail commitments within Zone 4, with floorspace net gains and losses generally cancelling each other out. The main food/beverage commitments is under construction at 180-218 Upper Tooting Road. The overall net gain in Class A3-A5 food/beverage floorspace in this zone is 1,717 sq.m gross. The residual floorspace capacity projections for Class A retail/food and beverage uses are shown in Table 6.6 below.

Table 6.6 – Tooting Zone 4 floorspace projections (sq.m gross)

Use class/type	2025	2030	2035	2040
A1 Convenience	-3	178	710	1,306
A1 Comparison	-407	-345	191	892
A3 – A5 Food and Beverage	-789	-364	433	1,286
Total	-1,199	-531	1,334	3,484

- 6.34 There is a projected over-supply at 2025 and 2030 suggests a cautious approach to new retail and food/beverage is required in the short to medium term.
- 6.35 Tooting Town Centre as 38 vacant units (about 4,900 sq.m). As in other zones, the short to medium term prospects for a significant reduction in the vacancy rate appears to be poor. In the longer term if the vacancy rate in Tooting reduced to 5% then 2,100 sq.m could be reoccupied.
- 6.36 The combined residual capacity (1,334 sq.m gross) for A1 retail and food/beverage floorspace at 2035 can theoretically be accommodated in vacant floorspace in Tooting Town Centre, based on modest reductions in the vacancy rate. There is no clear need to identify major retail or leisure led development allocations within Zone 4. The short to medium term priority in this zone should be the delivery/successful occupation of commitments and existing vacant units within centres/parades by a mix of convenience, comparison retail and non-retail services.

- 6.37 In the longer term up to 2040 residual growth that cannot be accommodated within vacant premises could be provided within mixed uses developments with a small element of convenience goods retail and services to cater for the local needs of the development.

Zone 5 – Balham

- 6.38 Zone 5 includes Balham Town Centre, and Local Centres at Bellevue Road, Clapham South and Tooting Bec and one Important Local Parade. There are no major planned retail commitments within Zone 4, with floorspace net gains and losses generally cancelling each other out. Food/beverage commitments suggest an overall net gain in Class A3 to A5 food/beverage floorspace in this zone of 773 sq.m gross. The residual floorspace capacity projections for Class A retail/food and beverage uses are shown in Table 6.7 below.

Table 6.7 – Balham Zone 5 floorspace projections (sq.m gross)

Use class/type	2025	2030	2035	2040
A1 Convenience	-216	-4	683	1,267
A1 Comparison	-393	-317	167	676
A3 – A5 Food and Beverage	-974	-643	-2	561
Total	-1,583	-964	848	2,504

- 6.39 As in other zones, the projected over-supply at 2025 and 2030 suggests the short to medium term prospects for a significant reduction in the vacancy rate appears to be poor and a cautious approach to new retail and food/beverage is required. Balham Town Centre has 24 vacant units (about 5,000 sq.m). If the vacancy rate in Balham reduced to 5% then 3,000 sq.m could be reoccupied.
- 6.40 The combined residual capacity (2,504 sq.m gross) for A1 retail and food/beverage floorspace at 2040 can theoretically be accommodated in vacant floorspace in Balham Town Centre and Local Centres in Zone 5, based on realistic reductions in the vacancy rate. There is no clear need to identify major retail or leisure led development allocations within Zone 5. The priority in this zone should be the reoccupation of vacant units within centres/parades by a mix of convenience, comparison retail and non-retail services.

Zone 6 – Clapham Junction

- 6.41 Zone 6 includes Clapham Junction Town Centre, Local Centres at Battersea Park Road and Lavender Hill and three Important Local Parades. There are a number of planned commitments within Zone 6 including the expansion of Lidl store and the Winstanley Estate regeneration. The residual floorspace capacity projections for Class A retail/food and beverage uses are shown in Table 6.8 below.

Table 6.8 – Clapham Junction Zone 6 floorspace projections (sq.m gross)

Use class/type	2025	2030	2035	2040
A1 Convenience	-1,443	-1,051	-362	360
A1 Comparison	-1,544	-1,064	196	1,716
A3 – A5 Food and Beverage	-1,604	-1,053	-433	216
Total	-4,591	-3,168	-599	2,292

- 6.42 Zone 6 has a relatively high projected over-supply at 2025 and 2030 due to the implementation of commitments. There is a small over-supply at 2035. Vacancy levels within Clapham Junction should be monitored, and the reuse of vacant space on the periphery of the town centre may need to be considered. Nevertheless, long-term growth to 2040 generates a small requirement.

- 6.43 Clapham Junction Town Centre has 17 vacant units (about 2,200 sq.m). The vacancy rate is relatively low. The short to medium term prospects for a significant reduction in the vacancy rate appears to be poor. Even if the vacancy rate in Clapham Junction reduced to 5% then only 200 sq.m would be reoccupied.
- 6.44 The projections suggest there is no capacity for new Class A1 to A5 floorspace for the foreseeable future up to 2035, due to the impact of commitments particularly at Battersea Power Station. The combined long term capacity (2,292 sq.m gross) for A1 retail and food/beverage floorspace at 2040 is modest but is unlikely to be accommodated in vacant floorspace in Clapham Junction Town Centre, due to the relatively low existing vacancy rate. There may be long term potential for small scale developments in Clapham Junction Town Centre. Major development would require an increase in the centre's market share of expenditure, potentially at the expenses of other centres e.g. Wandsworth Town or Balham and local centres in Zones 1, 5, 6 and 7.

Zone 7 – VNEB/Clapham

- 6.45 Zone 7 has one Important Local Parade at Battersea Park Road, but Lavender Hill Local Centre is also on the boundary of this zone. Most residents in Zone 7 live in Lambeth Borough and have good access to retail, service and leisure facilities at Clapham High Street, Brixton, Vauxhall and Stockwell. Residents within the VNEB area, within the north east part of Zone 7, will be served by major mixed use developments recently completed and currently under-construction.
- 6.46 The capacity projections assume commitments will be delivered and trading to their full potential by 2025. The floorspace projections beyond 2025 assume these commitments will maintain their market share of expenditure and continued population and expenditure growth will generate theoretical capacity for further floorspace at VNEB. The floorspace capacity projections for Class A retail/food and beverage uses over and above existing commitments are shown in Table 6.9 below.

Table 6.9 – VNEB/Clapham Zone 7 floorspace projections (sq.m gross)

Use class/type	2025	2030	2035	2040
A1 Convenience	-407	1	462	871
A1 Comparison	-3	874	2,340	3,929
A3 – A5 Food and Beverage	-1,539	-193	1,347	2,751
Total	-1,949	682	4,148	7,552

- 6.47 In the short term commitments create a floorspace over-supply at 2025, but a small requirement emerges by 2030. Battersea Park Road and Lavender Hill Local Centre have 23 vacant units (about 2,300 sq.m). The vacancies rate in Battersea Park Road is low (below 5%), but if the vacancy rate in Lavender Hill Local Centre was reduced to 8% then 1,400 sq.m could be reoccupied. All the combined residual capacity (682 sq.m gross) for A1 retail and food/beverage floorspace at 2030 could be accommodated in vacant units.
- 6.48 About a third of the combined residual capacity (4,148 sq.m gross) for A1 retail and food/beverage floorspace at 2035 can theoretically be accommodated in vacant floorspace in Lavender Hill Local Centre, based on realistic reductions in the vacancy rate.
- 6.49 Given that the precise nature and mix of uses within VNEB commitments is uncertain, these long term projections will need to be kept under review. The potential impact of any further development on designated centres should be considered. It is too early to make further allocations over and above commitments within Zone 7.

7.0 Strategic policy analysis

Overview

- 7.1 The WRTCNA was prepared in 2012 and was based on the guidance set out in the NPPF (published by the Department for Communities and Local Government on 27 March 2012) and the London Plan Adopted July 2011. The NPPF was revised in February 2019. The current London Plan was adopted in 2016. The latest version of the New London Plan Intention to Publish (NLPIP) was issued to the Secretary of State in December 2019 and the letter of response to the Mayor was submitted in March 2020. This response will delay the adoption of the New London Plan and requires the production of a modified London Plan. However, most of the modifications will relate to the delivery of housing and do not affect the approach towards town centre uses. In the meantime, the NLPIP policies relating to town centres will carry weight, particularly where they are consistent with the revised NPPF.
- 7.2 The WRTCNA was prepared in the context of the Wandsworth development plan at that time which included the Core Strategy (CS 2010), the Development Management Policy Document (DMPD 2012) and the Site Specific Allocations Document (SSAD 2012). These development plan documents were superseded by new documents adopted in 2016, i.e. CS 2016, DMPD 2016 and SSAD 2016. The Wandsworth Town Centre Use SPD (2015) also expands on policy and provides further guidance.
- 7.3 The emerging Wandsworth Local Plan is at an early stage, but the Full Review Issues Document (FRID 2018) provides a good summary of the key questions facing the Borough.
- 7.4 The revised NPPF (February 2019) consolidates a series of proposals that have been made in the last two and half years. In relation to town centres, the revised NPPF does not change the overall aims of policy, although there are some important modifications. For planning policies, local authorities are still required to support the role of town centres and the three main areas policies should focus on:
- defining a network and hierarchy of centres, allowing them to grow and diversify;
 - defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
 - allocating a range of suitable sites to meet the scale and type of development needed for at least 10 years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.
- 7.5 The revised NPPF acknowledges the rapid changes that are affecting town centres. It recognises that diversification is key to the long-term vitality and viability of town centres, including the need for residential development. Accordingly, planning policies should clarify the range of uses permitted in such locations, as part of a positive strategy for the future of each centre. This approach has been endorsed in the NLPIP – Policy SD6 (Town centres and high streets) which promotes a diverse range of uses, including main town centre uses, night-time-economy, civic, community, social and residential uses. It encourages mixed use development, adaptation/diversification of town centres and redevelopment/change of use/intensification of surplus office space to other uses including housing.
- 7.6 The NLPIP also refers to the need to manage vibrant daytime, evening and night-time activities to enhance town centres, but this should have regard to the role of individual centres. Improvements to tourist infrastructure, attractions and hotels in town centres are also supported.

- 7.7 The importance of a balance between retail and other town centre activity has increased since Wandsworth development plan documents were produced and adopted in 2016, as town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings.
- 7.8 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.
- 7.9 As in the original NPPF, applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against the sequential and impact tests. These tests are reiterated in the NLPPI Policy SD7.
- 7.10 The sequential test in both the NPPF and New London Plan indicates main town centre uses should locate in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered (para. 86). When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored (para. 87).
- 7.11 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. The New London Plan also includes an impact assessment for office uses, but this is not consistent with the revised NPPF. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 89). This should include an assessment of:
- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
 - the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).
- 7.12 Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 90). This approach is repeated in the NLPPI.
- 7.13 The designation of primary shopping areas (PSAs) or centre boundaries is important when applying the sequential approach, in order to direct retail and town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF continues to indicate that the first preference for retail uses should be the primary shopping area (PSA). The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.
- 7.14 The revised NPPF does not refer to primary and secondary frontages, which previously made up the PSA. The aim of the new NPPF appears to create more flexibility and encourage positive strategies for town centres. However, the PSA is still the defined area where retail development is concentrated.

- 7.15 NLPIP Policy SP7 also requires town centre boundaries, PSAs, primary/secondary frontages and the night-time economy of centres to be reviewed in Local Plans. The designations should take account of demand/capacity assessments for town centre uses and housing. If necessary the extent of shopping frontages should be revised where there is a surplus and greater flexibility should be introduced, again based on local circumstances. This implies a centre by centre approach.
- 7.16 NLPIP Annex 1 – Town Centre Network provides guidance on the classification of centres and indicators on the role and function of town and district centres across London. The NLPIP indicators for Balham, Clapham Junction, Putney, Tooting and Wandsworth Town are summarised in the centre health checks set out in Appendix 3. NLPIP Policy SP7 sets out the criteria for assessing the potential for intensification of town centres, which included much of the evidence set out in this study.
- 7.17 Other additional non-design related guidance for new development proposals within the New London Plan, and not included within the NPPF, include:
- ensuring commercial floorspace relates to the size, role and function or the town centre and its catchment;
 - ensuring development supports diversity of town centres by providing a range of commercial unit sizes, particularly larger scale developments.
- 7.18 NLPIP Policy SD8 sets out the network of centres across London, as summarised in Section 2 of this report. The NLPIP also provides indicators (Annex 1) for individual centres within the network, as follows:
- night-time economy classification;
 - commercial growth potential;
 - residential growth potential;
 - office guidelines; and
 - strategic areas for regeneration.
- 7.19 The indicators for the five main town centres in Wandsworth is included within the centre health checks in Appendix 3. Policy SD8 indicates that centres below Major Centre level can be reclassified if necessary through the local plan process, but the status of Major centres at Clapham Junction, Putney, Tooting and Wandsworth Town cannot be changed except through the London Plan. The New London Plan provides usual information regarding the classification and role of centres at different levels in the hierarchy.
- 7.20 Recent changes to the General Permitted Development Order (GPDO) have also had an impact on some town centres. These measures allow for greater flexibility for changes of use e.g. Class A and B1 office uses to C3 residential use and Class A1 uses to Class A2 uses. These measures can change the composition of town centres, including the amount of Class A1 space reducing in some centres. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages where there are concentrations of smaller units, but conversely it could have an impact on the ability of operators to find space in areas where demand is higher.

Hierarchy of centres

- 7.21 Map 1 – Key Diagram in the FRID sets on the existing vision for the Borough and identifies the designated town and local centres are the new CAZ frontages at Battersea Power Station and Vauxhall.

- 7.22 The hierarchy in the NLPIP is set out at paragraph 2.45 in this report. The Borough contains four Major Centres, three District Centres and two potential CAZ retail clusters. Four of the Borough's five main town centres are designated as Major Centres i.e. Clapham Junction, Putney, Tooting and Wandsworth Town. However, Balham town centre is only designated as a District Centre, whilst Local Centres at Earlsfield and Lavender Hill/Queenstown Road are classified as District Centres in the NLPIP.
- 7.23 Adopted Wandsworth development plan documents do not include District Centres, but this does not imply the five designated town centres are not in accordance with the NLPIP because the five Town Centres could incorporate both Major and District Centres. However, the NLPIP's designation of Earlsfield and Lavender Hill/Queenstown Road at the same level as Balham (District Centres) does imply a degree of inconsistency.
- 7.24 Three options could be considered for the emerging Wandsworth Plan, as follows:
1. no change to the current adopted Wandsworth hierarchy (as set out in CS 2016 Policy PL8);
 2. a new District Centre tier i.e. Town, District, Local and Important Local Parade; or
 3. retain the current hierarchy but downgrade Balham to Local Centre status.
- 7.25 Option 3 is the least consistent with the NLPIP because Balham would not be recognised as a higher order centre of more strategic importance i.e. a District Centre in the NLPIP. This approach would under-state the importance of Balham's role within the London hierarchy i.e. as a down-graded Local Centre. Option 3 is not sound or appropriate.
- 7.26 Option 2 would be the most consistent with the NLPIP, but Balham would be at a lower level (District Centre) in the hierarchy when compared with the other four town centres in the Borough. Earlsfield and Lavender Hill/Queenstown Road would need to be up-graded to District Centre status, at the same level as Balham.
- 7.27 Historically Balham has been defined as a District Centre in versions of the London Plan, below the four other town centres in the Borough, because it is smaller in terms of total floorspace. In this respect Wandsworth's development plan documents adopted in 2016 were not entirely consistent with the London Plan at that time, and circumstances have not changed significantly since then.
- 7.28 The amount of floorspace in a centre is an important consideration, but other local factors need to be considered. The analysis of centres in Section 2 confirms there is no single dominant town centre in the Borough, and the five designated town centres all play an important role as a focal point in their respective areas. Balham is more akin to the other town centres in the Borough both in terms of role, mix of uses and total floorspace than the larger Local Centres within the Borough. It is appropriate to differentiate Balham from the smaller Local Centres in the Borough, and therefore Options 2 and 3 above are not sound or appropriate. If adopted, these options would under-state the role of Balham (Option 3) or alternatively over-state the role of Earlsfield and Lavender Hill/Queenstown Road based on the local evidence presented in this report (Option 2).
- 7.29 Option 1 (no changes to the hierarchy) continues to be the most appropriate approach. New CAZ frontages at Battersea Power Station and Vauxhall should continue to be promoted, in line with the developments partially completed or under-construction.
- 7.30 As indicated in the analysis of local centres and parades in Appendix 3, the majority of Local Centres and Important Local Parades are meeting most community needs. All Local Centres provide a good selection of the essential shops and services. Some Local Parades i.e. at Battersea Bridge (ILP 1), Montfort Place (ILP 13), Petersfield Rise (ILP 16), Portswood Place (ILP 17), Rockingham Close (IPL18) and Trinity Road (ILP 21) have limited facilities. Most of these

under-performing parades are in the west of the Borough and may be under threat if shop/service closures occur in the future. This reinforces the need to accommodate the floorspace capacity projections in Zone 3. This will include the implementation of the Alton Estate regeneration proposals, the reoccupation of vacant space and, where appropriate, encourage any emerging mixed use developments that include an element of local shops and services in areas that are currently poorly served, subject to the sequential and impact tests.

- 7.31 The network of Local Centres and Important Local Parades should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

Floorspace projections and allocations

- 7.32 Retail and leisure growth should be focused in the main town centres where there are the best prospects for attracting investment. This is consistent with the approach set out in the adopted Wandsworth development plan documents, the NLPIP and the revised NPPF (2019).
- 7.33 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The revised NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres for at least 10 years. The need for development should not be compromised by limited site availability. To accommodate growth, local planning authorities should keep town centre boundaries under review (see below).
- 7.34 Tables 4.5 and 4.6 in the CS 2016 set out the convenience and comparison goods floorspace projections over the plan period to 2029, split into five year intervals and for each of the five Town Centres, Local Centres/Important Local Parades (collectively) and the VNEB area. The emerging Plan should update and roll forward these projections up to 2035, and possibly to 2040, in line with the five year interval projections set out in this study. A zonal breakdown of floorspace projections will be spatially more appropriate than a borough-wide figure for Local Centres/Important Local Parades. The projections should also include Class A3 to A5 food/beverage floorspace to provide a more holistic approach.
- 7.35 Wandsworth has a large number of vacant Class A1-A5 units (232 units and 33,800 sq.m floorspace) within designated centres and parades. A significant amount of new floorspace will be provided by development commitments particularly within the VNEB area, most of these commitments are identified as mixed use allocations in the SSAD 2016. Vacant premises and commitments should help to accommodate growth. Based on a reasonable reduction in vacancy rates, commitments and vacant floorspace could accommodate the need for new Class A1-A5 floorspace up to 2035, and about 70% of the overall projection for Wandsworth Borough up to 2040, leaving a residual projection of only 6,400 sq.m gross.
- 7.36 Vacant units in local centres and parades are generally small (less than 100 sq.m gross) and in secondary locations and may be more attractive for convenience retail and non-retail service uses catering for localised catchment areas, rather than comparison goods shopping which generally draws from a wider catchment area. As indicated earlier, the five main centres are likely to remain the focus for Class A1 comparison retail use and large scale leisure/entertainment/cultural uses.
- 7.37 The floorspace capacity projections assume the implementation of planned commitments with planning permission at the time of writing. The projections do not take account of retail, town centre uses proposed in undetermined applications, pre-application proposals or allocated mixed use development sites that do not currently have planning permission. The floorspace

capacity projections suggest there is no need to allocate major development sites for retail and other main town centre uses for the foreseeable future, over and above those already committed.

- 7.38 The strategy should prioritise the reoccupation of vacant units within designated Town and Local Centres and Important Local Parades, within the existing centre/parade boundaries. However, the future strategy should still be flexible to respond to new investment that cannot be accommodated in vacant units or designated centres. Some redevelopment, refurbishment and expansion may be required, ideally within designated centres/parades to accommodate some future investment opportunities.
- 7.39 Mixed use developments outside the designated centres (allocated within the SSAD 2016 or otherwise) may require an element of retail and services. Mixed use allocations within the SSAD 2016, that are not currently commitments with planning permission, should be reviewed and considered along with the need for other forms of development i.e. housing and Class B employment uses. Future mixed use allocations, outside designated centres, should ensure any new retail, leisure and other main town centre uses are of a scale and nature that would only serve the local needs generated by the development, and where that need cannot be met by existing facilities within nearby (e.g. 400-500 metres) designated Town Centre and/or Important Local Parades. Based on Lichfields' experience local shopping provision would normally serve top-up food and grocery trips (about 30% of total convenience goods expenditure) and lower order/day-to-day comparison goods (about 10%-20% of total comparison goods expenditure).
- 7.40 The scale/nature of retail, leisure and other main town centre uses appropriate will be determined by a range of factors including the amount of residential and/or employment development proposed, the proximity and health of designated centres/parades and cumulative impacts with other proposed developments. Given the complexity of these considerations, it is not possible to identify a maximum quantum of floorspace that will be appropriate for local facilities outside existing centres/parades. This issue is linked to the appropriate minimum floorspace threshold for the impact and sequential tests.
- 7.41 Retail and town centre uses within mixed use development/allocations should still be required to comply with the impact test (retail and leisure only) and sequential test. A review of these tests is outlined below. Future planning applications for mixed use development on allocated sites or other sites should be carefully considered on a case by case basis.
- 7.42 Additional town centre uses over and above those committed within the new CAZ frontages at Battersea Power Station and Vauxhall should continue to be subject to the impact test, as set out in adopted development plan documents, given the reduction in floorspace capacity projections and more difficult market conditions.

Impact test

- 7.43 The NPPF states that, when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is 2,500 sq. m gross. The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:
- the scale of proposals relative to town centres;
 - the existing viability and vitality of town centres;
 - cumulative effects of recent developments;

- whether local town centres are vulnerable;
- the likely effects of development on any town centre strategy; and the impact on any other planned investment.

- 7.44 The PPG also states that where authorities do not have their own floorspace thresholds for impact assessments in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The PPG acknowledges that it may occasionally be relevant to consider the impact of proposals below this floorspace threshold, e.g. if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre. Maintaining the sequential and impact test will allow each proposal to be considered on its individual merits.
- 7.45 DMPD 2016 Policy DMTS2 relates to out-of-centre development. The policy correctly indicates main town centre uses not within in-centre locations, as defined in Policy DMTS1, must comply with the impact and sequential test as set out in the NPPF. The impact threshold set out in Policy DMTS2 is 2,500 sq.m (which should for clarity specify gross floorspace).
- 7.46 The NPPF minimum threshold of 2,500 sq.m gross may be inappropriate as a blanket threshold across Wandsworth Borough, because this scale of development would represent a significant proportion of the overall long term retail/food beverage/leisure projections for most centres/zones in the Borough. For example, development much smaller than 2,500 sq.m gross could have a significant adverse impact on Local Centres or Important Local Parades, particularly where proposals are close to a vulnerable centre/parade.
- 7.47 Vacancy rates are relatively high in Balham, Putney and Wandsworth Town and some Important Local Parades are performing poorly. Retail commitments are expected to exceed expenditure growth up to and beyond 2030 and a significant over-supply of retail/food and beverage floorspace is envisaged in most zones at 2035 and 2030. As indicated in Section 6, a cautious approach is required in all zones in relation to new retail and food/beverage floorspace in the short to medium terms. Cumulatively with commitments, additional retail/leisure developments under 2,500 sq.m gross could have a significant adverse impact on centres or parades. Many other London Boroughs have adopted a much lower impact threshold than 2,500 sq.m gross, notably the Hillingdon Local Plan Part 2 adopted in January 2020, with a threshold of only 200 sq.m gross for retail uses and 1,000 sq.m gross of combined main town centre uses.
- 7.48 The Council should consider reducing the impact threshold in the emerging Local Plan. A reduced impact threshold of 400 sq.m gross, about 280 sq.m net consistent with the Sunday trading threshold could be adopted, which reflects the vulnerability of some of the smaller centres/parades. The Sunday trading threshold is widely accepted as the limit where a retail store becomes more significant in terms of its shopping role and catchment area.
- 7.49 Recent mixed use developments within the Borough have proposed flexible retail and leisure floorspace and several phases of development with different but related planning applications. The impact threshold should apply to retail and leisure uses combined, and also combined floorspace across different phases of development.
- 7.50 If this approach is adopted, then policy should also indicate that impact assessments should be proportionate to the scale and nature of development proposed. The level of detail required in the assessment will vary case-by-case depending on the specific local circumstances, therefore it is not appropriate to set specific impact assessment criteria for different floorspace thresholds. It is for the applicant to provide robust justification that their impact assessment is appropriate and proportionate.

Scale within centres

- 7-51 The NPPF does not require retail or leisure development within designated centres to be of an appropriate scale to that centre or require an impact assessment to be provided. DMPD 2016 Policy DMTS1 seeks to prevent in-centre development that would be out of keeping with the role and function of the centre. Whilst not advocated by the NPPF, the NLPIP Policy SD7 indicates development proposals should ensure commercial floorspace relates to the size, role and function of the town centre and its catchment, similar to Policy DMTS1.
- 7-52 Given the relatively low floorspace capacity projections identified in this study, overlapping catchment areas and the relatively high shop vacancy rates in some centres, a policy to control the scale of development within centres, i.e. development that could harm the hierarchy of centres, appears sound. Furthermore, this approach is consistent with the NLPIP. This approach is also helpful in applying the sequential approach to site selection.

Sequential approach

- 7-53 Town centres are expected to be the focus for retail, leisure and other main town centre uses. Larger town centres have the best prospects for attracting investment from developers and multiple operators. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites, in addition policy related to the appropriate scale of development within centres (as outlined above) is helpful in this respect.
- 7-54 The designation of primary shopping areas (PSAs) or centre boundaries is important when applying the sequential approach, to direct retail and town centre uses to sustainable locations and determine whether a retail impact assessment is required. The revised NPPF and NLPIP continue to indicate that the first preference for retail and other town centre uses should be the PSA for retail uses and the town centre boundary for other town centre uses. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.
- 7-55 Policy regarding edge and out-of-centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to refer to centre boundaries or other designated areas e.g. PSA or frontages. In many small centres the PSA/ shopping frontages and the town centre boundary may cover the same area and it may be unnecessary to designate two boundaries. A review of boundaries and frontages designations is set out later in this section.
- 7-56 Consistent with the sequential approach CS 2016 Policy PL8 and DMPD 2016 Policy DMTS1 seek to focus shopping leisure and a wide range of other town centre uses within town centres and CAZ frontages. Also consistent with the sequential approach and the need to promote diversity, CS Policy PL8 and LPEID Policies EI1 and EI2 seek to concentrate offices (as a main town centre uses) within town centres particularly Putney and Battersea Power Station. The NLPIP also identifies Clapham Junction as having mixed use office potential. The opportunities for significant new office space through intensification in these town centres may be limited and these centres already have good quality office space. Nevertheless, office development proposals and future allocations outside designated centres should still be considered against the sequential test.
- 7-57 DMPD Policies DMTS1 and DMTS2 correctly refers to main town centre uses rather than just retail. The sequential approach for arts, culture, entertainment, hotels and offices is repeated in Policies DMTS 12, DMTS13 and DMTS14. This approach could be simplified and amalgamated into just two policies relating to all main town centres uses, in-centre and out-of-centre, as

covered by existing Policies DMTS1 and DMTS2. This approach would be more consistent with NLPIP Policy SD7.

7.58 The NPPF and the NLPIP do not refer to a minimum floorspace threshold where the sequential test will be applied in the same way as the impact test. All main town centre uses regardless of scale are required to comply with the sequential test. DMPD Policy DMTS2 and supporting text at paragraph 4.19 indicate the sequential test only applies to developments over 300 sq.m (presumably related to the Sunday trading limit). Policy DMTS2 permits out-of-centre convenience goods retail development under this threshold where there are no local shops within 400 metres. Policy DMO 8 relates to focal points of activity with cross references to the tests in Policy DMTS2.

7.59 The benefit of the current policy approach is that it allows local convenience shops to be provided in areas that may be poorly served and/or within mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test.

7.60 The PPG suggests some certain main town centre uses have “particular market and locational requirements that mean they may only be accommodated in specific locations”, but robust justification must be provided. The aims of Policy DMTS2 appear to be consistent with this guidance. However, exemptions within Policy DMTS2 i.e. only convenience goods retail of less than 300 sq.m and where there are no local shops within 400 metres, appears to be relatively inflexible. It is also potentially anti-competitive e.g. a proposed convenience store could be refused because there is another out-of-centre store within 400 metres. The NPPF only seeks to protect designated centres and not individual out-of-centre businesses. There are other retail and town centre uses that could also serve local areas of deficiency e.g. a chemist. For these reasons, the Council should consider removing the 300 sq.m minimum threshold for the sequential test, i.e. the test should apply to all out-of-centre main town centre uses regardless of scale or type.

7.61 These issues are interrelated with the impact test threshold and also the appropriate scale and nature of new main town centre uses within mixed uses developments outlined above. As indicated above, mixed use out-of-centre developments should only be exempt from compliance with the sequential test where the proposed main town centre uses only serve the local needs generated by the development, and where that need cannot be met by existing facilities within nearby centres.

7.62 As indicated above, the appropriate scale/nature of retail, leisure and other main town centre uses will be determined by a range of complex factors and it is not possible to identify a maximum quantum of floorspace that will be appropriate for local facilities outside existing centres/parades. Future planning applications for out-of-centre town centre uses, including mixed use, should be carefully considered on a case by case basis. The proposed reduction of the impact threshold (400 sq.m gross) outlined above provides additional guidance and controls. However, future policy should refer to some town centre uses having a market and locational requirements e.g. where it would serve a local need not currently served by designated centres or parade. The onus is on the applicant to provide robust justification.

Impact and sequential test summary

7.63 To summarise, the Council should consider adopting the following approach.

- All retail and leisure developments over 400 sq.m gross (combined) proposed outside or on the edge of designated Town, Local Centres and Important Local Parades should be required to prepare a proportionate impact assessment. This includes retail and leisure uses included within mixed use allocations. The level of detail required in the impact assessment

will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate.

- All main town centre uses located outside or on the edge of designated Town, Local Centres and Important Local Parades should be required to consider the sequential test. The area of search for sequential sites i.e. relevant centres/parades will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, to be considered on a case-by-case basis. Some proposed main town centre uses may have market and locational requirements that cannot be met within designated centres/parades. Where this requirement is suggested, robust justification must be provided by the applicant.

8.0 **Area specific policy review**

Overview

8.1 As indicated in Section 6, the town centre hierarchy is appropriately defined in CS Policy. The extent of town and local centres and parades is clearly shown on the current development plan Proposals Map and the protected frontages are listed in the DMPD. These boundaries/frontages clearly relate to the application of the sequential and impact tests (CS Policy PL 8 and DMPD Policies DMTS1 and DMTS2) and policies to control the mix of use and potential loss of important uses (Policies DMTS3 to DMTS8).

8.2 The purpose of these designations is primarily to control the mix of uses rather than determining whether development is in-centre, edge-of-centre or out-of-centre in sequential terms. In this case, it is necessary to continue to define centre boundaries and shopping frontages in the emerging development plan. The emerging plan proposals map should continue to show all centre boundaries and frontage designations and a list of protected frontages.

Protected shopping frontages and local shops

8.3 Current policies seek to limit the proportion of non-Class A1 retail uses within the Core and Secondary Shopping frontages within Town Centres, Local Centres and Important Local Parades (ILPs), Policies DMTS3 to DMTS6. The controls are:

- 70% retained Class A1 uses in Core Shopping Frontages (CSFs) and no 3 adjoining non-retail uses in Town and Local Centres;
- 50% retained Class A1 uses in Secondary Shopping Frontages (SSFs) in Town and Local centres;
- only appropriate town centre uses in Other Frontages in Town and Local Centres and in ILPs;
- 50% retained Class A1 uses in ILPs and at least 5 units retained; and
- in all frontages and parades a shop front should be retained or provided.

8.4 Within the five Town Centres the majority (56%) of units are designated in Other Frontages, where there the greatest flexibility for changes of use. Only 19% of units are designated in CSFs. In this respect the current approach within Town Centres appears to be very flexible.

8.5 Whilst a consistent blanket approach to the mix of uses may be appropriate for Local Centres and ILPs, this approach may not reflect the specific character and role of Town Centres. The appropriate approach should be considered on a centre by centre basis, as one approach is unlikely to be suitable for all Town Centres. A review of the boundaries, frontage designations and an area based approach is set out below.

Available options

8.6 As indicated earlier, the revised NPPF does not suggest policies relating to the mix of Class A and non-Class A uses within primary and secondary shopping frontages should not be adopted, but the NPPF implies a more flexible approach should be considered based on local circumstances. There are two broad policy approaches that can be adopted to control the mix of uses within designated centres as follows:

- percentage thresholds restricting the amount of non-retail uses in designated frontages;
- criteria based policies that allow changes of use subject to specific requirements.

- 8.7 The threshold approach is currently adopted in Wandsworth Borough. Criteria based policies would allow changes of use from retail to non-retail use where:
- an extensive area of dead frontage or concentration of non-retail use would not be created;
 - the new use would contribute to, rather than harm, the attraction of the locality to customers/visitors;
 - the unit has been vacant for some time (i.e. over 12 or 18 months) and has been actively marketed within success; and where
 - the new uses would not create amenity problems for nearby uses in terms of noise, smells, litter or parking/highways issues.
- 8.8 The merits of the alternative criteria based approach should be considered based on the analysis below.
- 8.9 Based on Lichfields' experience the adoption of percentage thresholds can be difficult to monitor and the approach can be inflexible. However, the approach is transparent, providing clear guidance. Criteria based policies are more flexible, allowing change of use applications to be assessed on their individual merits. However, the application of criteria based policies can be less transparent and subjective. Both approaches are widely adopted across London and the South East and there is no right or wrong approach.
- 8.10 In addition to these two policy options, the Council should consider the following strategic approaches:
- strengthening shop frontages policies to provide more control over the loss of Class A1 retail uses. This would usually involve extending the areas of protected frontages and/or reducing the maximum threshold for non-retail uses. This would involve increasing the thresholds in Policies DMTS3 to DMTS6 and/or extending the protected frontages;
 - retaining the current development plan policies (e.g. that seek to control the extent of non-retail uses within designated frontages). This approach would involve no changes to Policies DMTS3 to DMTS6;
 - relaxing shop frontages policies to allow a more flexible approach to enable more non-retail uses. This would usually involve reducing the areas of protected frontage, increasing the maximum threshold for non-retail uses. This would involve amendments to Policies DMTS3 to DMTS6 or the introduction of a criteria based policy; or
 - a laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses within town centres. This would involve removal of Policies DMTS3 to DMTS6.
- 8.11 The appropriateness of these approaches is considered in light of the evidence on a centre by centre basis later in this Section.
- 8.12 The NPPF (paragraph 85) indicates that policies can make clear the range of uses that will be permitted in town centres and primary shopping areas, as part of a positive strategy for the future of each centre. A balanced mix of uses is required in town centres, which promotes growth. There is a reasonable degree of flexibility for local authorities to take account of local circumstances during the plan making process, and in this respect the revised NPPF is not prescriptive. The NLPIP supports this approach.
- 8.13 The suitability of the approach in Wandsworth Borough also needs to be considered in the context of recent changes in the mix of uses within frontages, the floorspace projections and changes to the General Permitted Development Order (GPDO). The changes to the GPDO will have an impact on the effectiveness of frontage policies. These measures allow for greater

flexibility for changes of use from retail to non-retail uses subject to Prior Approval e.g. Class A uses to C3 residential use and Class A1 to non-A1 uses. These measures could change the composition of town centres, including reducing the amount of Class A1 space where shop units are predominantly small (less than 150 sq.m gross). The ability to control non-A1 uses has diminished and the need to protect larger retail units may have increased. This suggests restrictive policies should be retained in core frontages areas where large units are concentrated, but restrictive policies outside the core frontages will be less effective.

8.14 The floorspace capacity projections suggest there is a need for a mix of Class A1 to A5 uses and to maintain the vitality and viability of centres. Food and beverage uses may also need to be controlled to prevent adverse impacts on residential amenity. Future policy should provide sufficient flexibility to allow improvements to non-retail uses in appropriate locations that does not impact on nearby residential uses. Increased restrictions on changes of use from Class A1 across frontages would not promote diversity and could stifle investment, which would be potentially damaging to the vitality and viability of centres. Particularly in secondary shopping frontages, the introduction of more restrictive shop frontage policies may be inappropriate as it could lead to an increase in vacant units, because demand for Class A1 retail occupiers is unlikely to be as strong within peripheral parts of centres. Furthermore, these areas generally have smaller units and the ability to control changes of use will be affected by changes to the GPDO. Nevertheless, a proliferation of non-retail uses could still be harmful to centre's vitality and viability.

8.15 Based on our experience across London, the typical minimum proportion of A1 use retained within primary/core shopping frontages usually ranges from 70% to 80%, which is consistent with DMTS3 (70%). For secondary shopping frontages, the typical minimum proportion of A1 use retained ranges from 30% to 50%, but often these secondary areas are unrestricted provided main town centres uses and shop frontages are retained. These proportions generally prevent clusters of non-retail use, whilst still maintaining some control on the overall predominance of Class A1 use in the core areas.

8.16 A review of the approach in the five main town centre is set out below.

Unit sub-division

8.17 Policies DMTS3 to DMTS6 relate to retaining ground floor units and frontages rather than floorspace, because this is easier to monitor/measure. There is a concern that Class A units have been sub-divided, and part converted to other uses, and therefore changes are not contrary to the protection policies. As a result, some units have become too small and unviable. Whilst kiosk units can be very small (less than 20 sq.m gross) these types of premises are only viable in certain locations e.g. train stations, busy indoor shopping centres or market stalls. In most cases small shop units tend to be at least 50 sq.m gross. The zonal rental approach for retail units (Zone A, B, C and other) means small units are expensive in terms of the average rent per square metre. Larger units provide cheaper backstage space. Small units are not as cost efficient as they may seem i.e. a 25 sq.m unit is not half the cost of a 50 sq.m unit.

8.18 The NLPPI Policy SD7 refers to new development providing a range of unit sizes, but it also states commercial space should be fit for purpose, not compromised in terms of layout, street frontage or servicing. Rather than including an arbitrary minimum unit size, created by new development, sub-division or changes of use, a new policy criterion could be introduced consistent with NLPPI Policy SD7, i.e. new development and changes of use should provide commercial space that is fit for purpose and viable in terms of adequate width and depth, layout, street frontage and servicing. Each application would be considered on its merits to assess whether the resulting commercial space is fit for purpose.

Local Centres and Important Local Parade

- 8.19 Within Local Centres and ILPs there is a need to retain a minimum level of local shops and services. The analysis of ILPs in Appendix 3 indicates small parades with less than 5 retail units have a deficiency in essential shops and services and the approach set out in Policy DMTS6 remains appropriate. In smaller centres and parades, it is necessary to retain a critical mass of both shops and services (Class A1 to A5), to ensure the vitality and viability of the centre is maintained. Controls to maintain local access to shops and services need to be retained.

Balham Town Centre

- 8.20 The strategic priorities for Balham Town Centre are:
- reducing the relatively high vacancy rate;
 - increasing the centre's expenditure retention within the affluent local catchment area;
 - maintaining the diverse mix of independent traders, anchored by a small selection of multiple operators;
 - maintaining a mix of retail and other uses, providing a balance between day-time and evening uses;
 - environmental improvements to assist pedestrian movement and mitigate the impact of traffic congestion; and
 - in the longer term identifying opportunities for small scale intensification, including residential and office uses on upper floors.
- 8.21 Balham is a linear town centre, but the centre boundary is tightly drawn around the retail and commercial area. The boundary does not extend beyond the railway line to the south along Balham High Road and Bedford Hill. Commercial uses to the south of the railway line are not designated ILPs and therefore have limited protection. Commercial uses in this area are generally of a local nature. The railway line acts as a natural barrier but there is pedestrian flows between the two areas. Consideration could be given to an extension to the Balham town centre boundary, if the Council considered the uses in this area should be afforded more protection. Given the relatively high vacancy rate within Balham Town Centre boundary and the relatively low floorspace capacity projections for this zone, there is no clear need to extend the centre boundary to the south.
- 8.22 To the north, the centre boundary extends up to Ravenswood Road. There are commercial uses further to the north, but they are local facilities, peripheral to the Balham town centre core area. To the east and west the commercial area is constrained by residential streets. No amendments to the Balham town centre boundary are recommended.
- 8.23 The centre health check in Appendix 3, suggests Balham Town Centre has a lower proportion of Class A1 units (44%) when compared with the GLA London and UK averages, both around 55%. The shop vacancy rate (12.4%) is comparable with the UK average but above the GLA average (8.6%).
- 8.24 Balham has a relatively small area designated as CSF (only 15% of units compared with the 19% average for all Town Centres). The CSFs correctly include the prime pitch where the majority of large units (over 200 sq.m) and multiple retail operators are located. This area extends along Balham High Street from the Balham Station Road junction to the Balham Grove Junction, a compact stretch of about 300 metres. There is no basis to extend or contract the CSF.
- 8.25 The Council's 2018 data suggests 64% of units within the CSF are in Class A1 use, below the policy minimum threshold, which effectively means no further changes of use from Class A1

should be permitted in this area. There were four vacant units within the CSF a vacancy rate of 12%, which is relatively high for CSFs.

8.26 The SSFs includes only 9% of the centre's units compared with the 25% average for all Town Centres. This area includes the Sainsbury's store and units around the Bedford Hill and Balham High junctions. The Council's 2018 data suggests 50% of units within the SSF are in Class A1 use, in line with the policy minimum threshold, which again means no further changes of use from Class A1 should be permitted in this area. There were no vacant units within the SSF.

8.27 Most (75%) of Balham's town centre units are within Other Frontage, the highest proportion within the five Town Centres (average 56%). The vacancy rate within Balham's Other Frontages is relatively high (nearly 13%) suggesting a more restrictive approach is inappropriate.

8.28 Potential options to be considered for Balham are:

- a reduced minimum retained Class A1 threshold in the CFS from 70% to 60%;
- deletion of the SSF and amalgamation with the Other Frontages;
- a new policy criterion to consider sub-division and whether resulting commercial space is fit for purpose.

Clapham Junction Town Centre

8.29 The strategic priorities for Clapham Junction are:

- maintaining its status as a Major Centre in the London Hierarchy;
- regeneration and improvements to the area around Clapham Junction Station;
- maintaining the relatively low vacancy rate;
- maintaining the centre's high expenditure retention by serving a diverse local catchment area;
- maintaining and if possible enhancing the centre's comparison goods offer, both independent and multiple operators;
- maintaining and enhancing the centre's strong evening/night-time economy;
- environmental improvements to assist pedestrian movement and mitigate the impact of traffic congestion; and
- in the longer term identifying opportunities for major mixed use development, including residential and office uses on upper floors.

8.30 Clapham Junction is a large town centre. The boundary covers a wide area including the station area to the north of the retail and commercial area. It includes the Falcon Lane area and the TA Centre and other uses to the west of the existing commercial area along St John's Hill. This implies development on these sites would not be considered against the impact and sequential tests.

8.31 The centre health check in Appendix 3, suggests Clapham Junction Town Centre has a comparable proportion of Class A1 units (57%) when compared with the GLA London and UK averages, both around 55%. The shop vacancy rate (5.6%) is lower than the UK average and GLA averages.

8.32 Clapham Junction has a reasonable sized area designated as CSF (20% of unit compared with the 19% average for all Town Centres). The CSFs include the prime pitch where the majority of large units (over 200 sq.m) and multiple retail operators are located, including Debenham's and Marks & Spencer. This area extends along St. Johns Road from St. John's Hill/Lavender Hill to

Battersea Rise, a compact stretch of about 300 metres. The CSF also include the Asda, Boots and Lidl units, which does not appear to be consistent with its peripheral location and Site Specific Allocation status. The extent of CSF in this area should be reconsidered.

8.33 The Council's 2018 data suggests 74% of units within the CSF are in Class A1 use, above the policy minimum threshold, which means further changes of use from Class A1 should be permitted in this area. There were six vacant units within the CSF a vacancy rate of less than 9%. The current 70% minimum threshold remains appropriate.

8.34 The SSFs includes 36% of the centre's units compared with the 25% average for all Town Centres. The SSF' includes the main frontages along Northcote and St. John's Hill/Lavender Hill. The Council's 2018 data suggests 60% of units within the SSF are in Class A1 use, well above the policy minimum threshold, which again means further changes of use from Class A1 should be permitted in this area. The vacancy rate in this area is less than 6%. There is no need to relax or strengthen restrictions in this area.

8.35 About 43% of Clapham Junction's units are within Other Frontage, below the average for the five Town Centres (56%). The vacancy rate within the Other Frontages is very low (less than 3%) suggesting a less restrictive approach is not required.

8.36 Potential options to be considered for Clapham Junction are:

- amendments to the town centre boundary to exclude the Station area to the north and the area to the west of the centre along St John's Hill not currently occupied by main town centre uses;
- removal of the Asda, Boots and Lidl store from the CSF and re-designation as SSF; and
- a new policy criterion to consider sub-division and whether resulting commercial space is fit for purpose.

Putney Town Centre

8.37 The strategic priorities for Putney Town Centre are:

- maintaining its status as a Major Centre in the London Hierarchy;
- reducing the relatively high vacancy rate;
- increasing the centre's expenditure retention within the affluent local catchment area building on its relatively high market positioning;
- enhancing the centre's comparison goods offer, particularly within Putney Exchange to anchor the rest of the centre;
- maintaining a mix of retail and other uses, providing a balance between day-time and evening uses;
- Maximising the benefits of linkages to the River and environmental improvements to assist pedestrian movement and mitigate the impact of traffic congestion; and
- in the longer term identifying opportunities for small scale intensification, including residential and office uses on upper floors.

8.38 Putney's centre boundary is relatively tightly drawn around the retail and commercial area. The commercial area is constrained by the River and residential streets. The boundary includes riverside uses stretching either side of Putney Bridge, which provide an important additional attraction. Potential amendments to the Putney town centre boundary are assessed below.

8.39 The centre health check in Appendix 3, suggests Putney Town Centre has a comparable proportion of Class A1 units (53%) when compared with the GLA London and UK averages, both

around 55%. The shop vacancy rate (13%) is the highest in the Borough and above the UK and GLA averages.

- 8.40 Putney has a relatively large area designated as CSF (28% of unit compared with the 19% average for all Town Centres). The CSFs correctly include Putney Exchange and Putney High Street from Putney Bridge Road to Werter Road/Chelverton Road. This area is the prime pitch where the majority of large units (over 200 sq.m) and multiple retail operators are located. It provides a compact and convenient shopping circuit for pedestrians. Indoor accommodation within Putney Exchange provides additional flexibility in terms of the configuration of space (without the need for planning permission) to meet changing occupier requirements. Putney Exchange also provides an invaluable sheltered, traffic free and pleasant shopping environment.
- 8.41 The Council's 2018 data suggests 74% of units within the CSF are in Class A1 use, above the policy minimum threshold, which means further changes of use from Class A1 should be permitted in this area. There were 15 vacant units within the CSF, a high vacancy rate of over 17%. This suggests a more restrictive approach in the CSF would be inappropriate, despite the additional flexibility provided in Putney Exchange, which also has vacant units.
- 8.42 The SSFs includes 35% of the centre's units compared with the 25% average for all Town Centres. The Council's 2018 data suggests 59% of units within the SSF are in Class A1 use, again above the policy minimum threshold, which again means further changes of use from Class A1 should be permitted in this area. The vacancy rate in this area is also relatively high (12%), despite the ability for further changes of use.
- 8.43 Putney has a relatively low proportion (37%) of units within Other Frontages, the lowest proportion within the five Town Centres (average 56%). The vacancy rate within Putney's Other Frontages is relatively low (nearly 6%).
- 8.44 Given the relatively high vacancy rate in Putney, despite flexibility within Putney Exchange and change of use flexibility allowed by policy, potential options to be considered for Putney are:
- re-designation of some of the SSFs to Other Frontages e.g. SSFs along Upper Richmond Road;
 - deletion of some of the Other Frontages and a contraction of the town centre boundary, e.g. on Upper Richmond Road the most peripheral frontages (east and west);
 - a new policy criterion to consider sub-division and whether resulting commercial space is fit for purpose.
- 8.45 Given that the shop vacancy rate is relatively low on the Other Frontages the re-designation of SSFs appears more appropriate than a contraction of the town centre boundary.

Tooting Town Centre

- 8.46 The strategic priorities for Tooting Town Centre are:
- maintaining its status as a Major Centre in the London Hierarchy;
 - maintaining the relatively low vacancy rate;
 - increasing the centre's expenditure retention within the diverse local catchment area;
 - maintaining the diverse mix of independent traders, supported by the popular indoor markets, which provides additional flexibility for day time and evening time uses;
 - enhancing the centre's strong evening/night-time economy;
 - environmental improvements to assist pedestrian movement, mitigate the impact of traffic congestion and improve shop frontages; and

- in the longer term identifying opportunities for small scale intensification, including residential and office uses on upper floors.
- 8.47 Tooting is a linear town centre. The indoor Tooting and Broadway markets account for around a third of Class A outlets within the centre and are important to the centre's overall attraction and diversity. The markets provide a high degree of flexibility, including opportunities for pop-up and temporary uses, day-time and evening uses.
- 8.48 The centre boundary extends to the Sainsbury's store to the south although commercial uses continue along Tooting High Street to the South. The centre extends to Ansell Road/Derinton Road to the north, although commercial uses continue Upper Tooting Road and eventually merge with Tooting Bec Local Centre to the north. This linear/ribbon structure makes it difficult to define the extent of the centre boundary. Equal arguments could be made to extend or contract the boundary. On balance, no amendments to the Tooting town centre boundary are recommended.
- 8.49 The centre health check in Appendix 3, suggests Tooting Town Centre has a comparable proportion of Class A1 units (57%) when compared with the GLA London and UK averages, both around 55%. The shop vacancy rate (8.9%) is comparable with the GLA London average but lower than the UK average (12.4%).
- 8.50 Tooting has a very small area designated as CSF (only 5% of unit compared with the 19% average for all Town Centres). The CSFs correctly include the prime pitch where the majority of large units (over 200 sq.m) and multiple retail operators are located. This area extends from Primark on Mitcham Road to the Tooting High Street/Totterdown Street junction. There is no basis to extend or contract the CSF.
- 8.51 The Council's 2018 data suggests 69% of units within the CSF are in Class A1 use, just below the policy minimum threshold, which effectively means no further changes of use from Class A1 should be permitted in this area. There was one vacant unit within the CSF. There is no need to strengthen or relax the policy approach in the CSF, particularly given the high degree of flexibility offered within the indoor markets.
- 8.52 The SSFs includes 25% of the centre's units in line with the average for all Town Centres. This area includes the frontages immediately adjacent to or opposite the CSF. The Council's 2018 data suggests 59% of units within the SSF are in Class A1 use, above the policy minimum threshold, which again means further changes of use from Class A1 should be permitted in this area. There were only 6 vacant units within the SSF.
- 8.53 The Other Frontages includes 69% of the centre's unit, the second highest proportion within the five Town Centres (average 56%). The vacancy rate within Tooting's Other Frontages is higher than the rest of the centre but still below 10%. This suggests a more restrictive approach is inappropriate in the Other Frontages.
- 8.54 No changes to the policy approach area recommended in Tooting other than a new policy criterion to consider sub-division and whether resulting commercial space is fit for purpose.

Wandsworth Town Centre

- 8.55 The strategic priorities for Wandsworth Town Centre are:
- maintaining its status as a Major Centre in the London Hierarchy;
 - reducing the relatively high vacancy rate including reoccupation of the former Debenhams unit and the successful occupation of the Ram Quarter development;

- maintaining the centre's high expenditure retention within the affluent local catchment area;
- regeneration and improvements to the area to the north of the centre to improve linkages to the River;
- maintaining and if possible enhancing the centre's comparison goods offer, particular multiple operators to serve a wide catchment area;
- maintaining and enhancing the centre's strong evening/night-time economy;
- environmental improvements to assist pedestrian movement and mitigate the impact of traffic congestion including implementation of the proposed one-way system; and
- in the longer term identifying opportunities for major mixed use development, including residential and office uses on upper floors.

8.56 Wandsworth is a compact centre, focused around the Southside Shopping Centre. Indoor accommodation within Southside Shopping Centre provides additional flexibility in terms of the configuration of space to meet changing occupier requirements. It also provides a sheltered, traffic free and pleasant shopping environment. The Town Centre boundary is relatively widely drawn to include the Ram Quarter area and Civic uses. No amendments to the Wandsworth town centre boundary are recommended.

8.57 The centre health check in Appendix 3, suggests Wandsworth Town Centre has a higher proportion of Class A1 units (59%) when compared with the GLA London and UK averages, both around 55%. The shop vacancy rate (10.6%) is below the UK average but above the GLA average (8.6%).

8.58 Wandsworth has a relatively large CSF (44% of unit compared with the 19% average for all Town Centres). The CSFs correctly includes the Southside Shopping Centre which is the prime pitch where the majority of large units (over 200 sq.m) and multiple retail operators are located. There is no basis to extend or contract the CSF.

8.59 The Council's 2018 data suggests 91% of units within the CSF are in Class A1 use, significantly above the policy minimum threshold, which means further changes of use from Class A1 should be permitted in this area. There were only three vacant units within the CSF. The 70% policy threshold appears to be low in relation to the current mix of uses in the CFS.

8.60 Wandsworth has no SSFs but 56% of units are included in Other Frontages, including the upper floor in Southside Shopping Centre where there is a focus of leisure (cinema) and food/beverage uses. The Council's 2018 data suggests 38% of units within the Other Frontages are in Class A1 use. The vacancy rate within the Other Frontages is relatively high (13%) and this does not include the Ram Quarter, suggesting a more restrictive approach is inappropriate.

8.61 Potential options to be considered for Wandsworth are:

- increase the minimum retained Class A1 threshold in the CFS from 70% to 80%; and
- a new policy criterion to consider sub-division and whether resulting commercial space is fit for purpose.

9.0 Summary and conclusions

9.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for Wandsworth Borough. It explores how the identified growth across the Borough could be accommodated and the future role of the main centres.

Wandsworth Borough's needs

9.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail and leisure development over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

9.3 Long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long term projections must be treated with caution and kept under review, particularly projections up to 2035 and 2040.

Convenience goods retail

The convenience goods expenditure projections, taking account of the growth of home/internet shopping as currently recommended by Experian, suggest new floorspace could be distributed as shown in Table 9.1. These projections are over and above planned commitments with planning permission at the time of writing.

Table 9.1 Convenience goods floorspace capacity (sq.m gross)

Area	2025	2030	2035	2040
Zone 1: Wandsworth	97	436	1,062	1,752
Zone 2: Putney	-41	8	256	556
Zone 3: Roehampton	-171	-93	68	256
Zone 4: Tooting	-3	178	710	1,306
Zone 5: Balham	-216	-4	683	1,267
Zone 6: Clapham Junction	-1,443	-1,051	-362	360
Zone 7: VNEB	-407	1	462	871
Total	-2,183	-525	2,878	6,370

Source: Table 14, Appendix 5

9.4 The highest convenience goods expenditure surplus at 2035 relates to Wandsworth, Tooting and Balham. All residents in the Borough have good access to food stores both within and outside the Borough. Wandsworth Town appears to be the most obvious locational gap in discount food store provision.

Comparison goods retail

9.5 The comparison goods expenditure projections, taking account of the growth of home/internet shopping as currently recommended by Experian, suggest new floorspace over and above planned commitments could be distributed as shown in Table 9.2.

Table 9.2 Comparison goods floorspace capacity (sq.m gross)

Area	2025	2030	2035	2040
Zone 1: Wandsworth	-1,314	-1,040	302	2,094
Zone 2: Putney	-237	-331	-10	502
Zone 3: Roehampton	-325	-13	92	239
Zone 4: Tooting	-407	-345	191	892
Zone 5: Balham	-393	-317	167	676
Zone 6: Clapham Junction	-1,544	-1,064	196	1,716
Zone 7: VNEB	-3	874	2,340	3,929
Total	-4,222	-2,235	3,277	10,048

Source: Table 14, Appendix 6

- 9.6 Shopping destinations within and accessible from the Borough provide a good range of comparison shops, including many national multiples and independent specialists. The regeneration of Battersea Power Station is expected to provide a new major comparison goods shopping destination that will be accessible to most residents within Wandsworth Borough. The retail warehouse representation has decreased within inner London, but residents have reasonably good access to retail warehouses in Merton. Overall the accessibility for residents in the Borough to a range and choice of comparison goods shopping destination is excellent.

Food and beverage uses

- 9.7 The food and beverage projections suggest new floorspace could be distributed as shown in Table 9.3.

Table 9.3 Food/beverage floorspace capacity (sq.m gross)

Area	2025	2030	2035	2040
Zone 1: Wandsworth	-2,119	-1,471	-495	529
Zone 2: Putney	-395	-190	322	934
Zone 3: Roehampton	14	24	50	82
Zone 4: Tooting	-789	-364	433	1,286
Zone 5: Balham	-974	-643	-2	561
Zone 6: Clapham Junction	-1,604	-1,053	-433	216
Zone 7: VNEB	-1,539	-193	1,347	2,752
Total	-7,406	-3,890	1,221	6,360

Source: Table 14, Appendix 7

Combined floorspace

- 9.8 The combined projections suggest new floorspace could be distributed as shown in Table 9.4.

Table 9.4 Combined floorspace capacity (sq.m gross)

Area	2025	2030	2035	2040
Zone 1: Wandsworth	-3,336	-2,075	869	4,375
Zone 2: Putney	-673	-513	567	1,993
Zone 3: Roehampton	-482	-82	210	576
Zone 4: Tooting	-1,199	-531	1,334	3,484
Zone 5: Balham	-1,583	-964	848	2,504
Zone 6: Clapham Junction	-4,591	-3,168	-599	2,292
Zone 7: VNEB	-1,949	682	4,148	7,552
Total	-13,813	-6,651	7,376	22,777

- 9.9 The total projection to 2040 is 22,777 sq.m gross which is less than the current amount of vacant floorspace in the Borough (about 33,800 sq.m gross). Based on a reasonable reduction in shop vacancy rates, reoccupied space could accommodate over 70% of the projected need to 2040 (about 16,000 sq.m gross).

Other main town centre uses

- 9.10 Residents in Wandsworth Borough have good access to a range of commercial leisure and entertainment facilities within the Borough and in the surrounding areas. Facilities in Central London are accessible. Most of the key sectors are represented. There may be potential to improve facilities by 2040 as follows:

- theoretical capacity for a medium sized cinema/770 additional cinema seats;
- 4 to 5 (average 70 stations) additional health and fitness facilities;
- theoretical potential for a tenpin bowling facility, perhaps as part of a major mixed use development;
- theoretical capacity for a bingo facility;
- a permanent indoor trampoline centre;
- 1-2 new libraries to serve new residential areas;
- 4 new community centres/halls to serve new residential areas; and
- nearly 700 additional hotel bedrooms.

Strategy for accommodating growth

- 9.11 The floorspace projections shown in this study provide broad guidance. The projected floorspace over-supply at 2025 and 2030 suggest the short to medium term prospects for a significant reduction in the vacancy rate appears to be poor. The priority should be to concentrate, if possible, new main town centre uses within vacant floorspace within centres. A cautious approach to new retail and food/beverage is required in the short to medium term.
- 9.12 In the longer term, meeting the projections to 2035 is the priority, but these longer-term projections need to be monitored. Based on realistic reductions in shop vacancy rates, reoccupied vacant units in total could accommodate up to 16,400 sq.m gross. Less than half this reduction in vacant units/space would be required to accommodate all of the combined Class A1 to A5 floorspace projection for Wandsworth Borough up to 2035. If the reduction in vacant units can be achieved by 2040, then about 70% of the overall Class A1 to A5 floorspace projection for Wandsworth Borough could be accommodated, leaving a residual projection of only 6,400 sq.m gross. These figures assume all Class A1 to A5 commitments will be delivered and occupied in addition to the occupation of vacant space.
- 9.13 The future strategy should also be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required, ideally within designated centres/parades and this is likely to be higher density mixed use development, probably with residential on upper floors.
- 9.14 In Zone 1 - Wandsworth most (up to 70%) of the combined residual capacity (4,375 sq.m gross) for A1 retail and food/beverage floorspace at 2040 can theoretically be accommodated in vacant floorspace in Wandsworth Town Centre. There is no clear need to identify major retail or leisure led development allocations within Zone 1. The future priority in this zone should be the delivery/successful occupation of commitments and existing vacant units within Wandsworth Town.

- 9.15 In Zone 2 - Putney all the combined long term capacity (1,993 sq.m gross) for A1 retail and food/beverage floorspace at 2040 can theoretically be accommodated in vacant floorspace in Putney Town Centre.
- 9.16 In Zone 3 - Roehampton commitments including the Alton Estate regeneration will help to absorb growth. The combined long term residual capacity (576 sq.m gross) for A1 retail and food/beverage floorspace at 2040 is relatively insignificant. Elsewhere, any emerging mixed use developments that include an element of local shops and services could be encouraged in areas that are currently poorly served, subject to compliance with the sequential and impact tests.
- 9.17 In Zone 4 – Tooting the combined residual capacity (1,334 sq.m gross) for A1 retail and food/beverage floorspace at 2035 can theoretically be accommodated in vacant floorspace in Tooting Town Centre. Vacant floorspace might reasonably be expected to accommodate 60% of the longer term capacity projection to 2040. There is no clear need to identify major retail or leisure led development allocations within Zone 4.
- 9.18 In Zone 5 – Balham, the combined residual capacity (2,504 sq.m gross) for A1 retail and food/beverage floorspace at 2040 can theoretically be accommodated in vacant floorspace in Balham Town Centre. There is no clear need to identify major retail or leisure led development allocations with Zone 5.
- 9.19 In Zone 6 - Clapham Junction the projections suggest there is no capacity for new Class A1 to A5 floorspace for the foreseeable future up to 2035, due to the impact of commitments particularly at Battersea Power Station. There may be longer term potential for small scale developments in Clapham Junction Town Centre.
- 9.20 In Zone 7 – VNEB/Clapham residents will be served by major mixed use developments recently completed and currently under-construction. The floorspace projections beyond 2025 assume these commitments will maintain their market share of expenditure and continued population and expenditure growth will generate theoretical capacity for further floorspace at VNEB. About a third of the combined residual capacity (4,148 sq.m gross) for A1 retail and food/beverage floorspace at 2035 can theoretically be accommodated in vacant floorspace in Lavender Hill Local Centre. Given that the precise nature and mix of uses within VNEB commitments is uncertain, these long term projections will need to be kept under review. The potential impact of any further development on designated centres should be considered. It is too early to make further allocations over and above commitments within Zone 7.

Policy review

- 9.21 The emerging Plan should update and roll forward these projections up to 2035, and possibly to 2040, in line with the five year interval projections set out in the tables above. The projections should also include Class A3 to A5 food/beverage floorspace to provide a more holistic approach

Hierarchy of centres

- 9.22 The network of Town and Local Centres and Important Local Parades should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns. Adopted Wandsworth development plan documents do not include District Centres, but this does not imply the five designated town centres are not in accordance with the NLPIP because the five Town Centres could incorporate both Major and District Centres. However, the NLPIP's designation of Earlsfield and Lavender Hill/Queenstown Road at the same level as Balham (District Centres) does imply a degree of inconsistency.

9.23 The analysis in this report confirms there is no single dominant town centre in the Borough, and the five designated town centres all play an important role as a focal point in their respective areas. It is appropriate to differentiate Balham from the smaller Local Centres in the Borough. No change to the current adopted hierarchy of centres is recommended.

9.24 Most of the under-performing Important Local Parades are in the west of the Borough, which reinforces the need to accommodate the floorspace capacity projections in Zone 3.

Impact test

9.25 The NPPF minimum threshold of 2,500 sq.m gross may be inappropriate as a blanket threshold across Wandsworth Borough. The Council should consider reducing the impact threshold to 400 sq.m gross consistent with the Sunday trading threshold. This threshold should apply to retail and leisure uses combined, and also combined floorspace across different phases of development. The level of detail will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is appropriate and proportionate. A policy to control the scale of development within centres, i.e. development that could harm the hierarchy of centres, appears sound.

Sequential approach

9.26 Town centres are expected to be the focus for retail, leisure and other main town centre uses. The continued classification of centres and within the hierarchy is important. Emerging policies should refer to main town centre uses rather than just retail. All main town centre uses regardless of scale are required to comply with the sequential test. The Council should consider removing the 300 sq.m minimum threshold for the sequential test. However, future policy should refer to some town centre uses having a market and locational requirements e.g. where it would serve a local need not currently served by designated centres or parade. The onus is on the applicant to provide robust justification.

Protected shopping frontages and local shops

9.27 The floorspace capacity projections suggest there is a need for a mix of Class A1 to A5 uses and to maintain the vitality and viability of centres. Future policy should provide sufficient flexibility to allow improvements to non-retail uses in appropriate locations that does not impact on nearby residential uses. The introduction of more restrictive shop frontage policies may be inappropriate as it could lead to an increase in vacant units. Furthermore, the ability to control changes of use will be affected by changes to the GPDO. Nevertheless, a proliferation of non-retail uses could still be harmful to centre's vitality and viability.

9.28 A new policy criterion could be introduced to ensure units in centres remain fit for purpose. New development and changes of use should provide commercial space that is viable in terms of adequate width and depth, layout, street frontage and servicing. Each application would be considered on its merits to assess whether the resulting commercial space is fit for purpose.

9.29 Within Local Centres and ILPs there is a need to retain a minimum level of local shops and services. In smaller centres and parades, it is necessary to retain a critical mass of both shops and services (Class A1 to A5), to ensure the vitality and vitality. Controls to maintain local access to shops and services need to be retained.

Strategic priorities for town centres

Balham Town Centre

9.30 The strategic priorities for Balham Town Centre are:

- reducing the relatively high vacancy rate;
- increasing the centre's expenditure retention within the affluent local catchment area;
- maintaining the diverse mix of independent traders, anchored by a small selection of multiple operators;
- maintaining a mix of retail and other uses, providing a balance between day-time and evening uses;
- environmental improvements to assist pedestrian movement and mitigate the impact of traffic congestion; and
- in the longer term identifying opportunities for small scale intensification, including residential and office uses on upper floors.

9.31 No amendments to the Balham town centre boundary are recommended. There is no basis to extend or contract the CSF. Potential options to be considered for Balham are:

- a reduced minimum retained Class A1 threshold in the CFS from 70% to 60%;
- deletion of the SSF and amalgamation with the Other Frontages;
- a new policy criterion to consider sub-division and whether resulting commercial space is fit for purpose.

Clapham Junction Town Centre

9.32 The strategic priorities for Clapham Junction are:

- maintaining its status as a Major Centre in the London Hierarchy;
- regeneration and improvements to the area around Clapham Junction Station;
- maintaining the relatively low vacancy rate;
- maintaining the centre's high expenditure retention by serving a diverse local catchment area;
- maintaining and if possible enhancing the centre's comparison goods offer, both independent and multiple operators;
- maintaining and enhancing the centre's strong evening/night-time economy;
- environmental improvements to assist pedestrian movement and mitigate the impact of traffic congestion; and
- in the longer term identifying opportunities for major mixed use development, including residential and office uses on upper floors.

9.33 Potential options to be considered for Clapham Junction are:

- amendments to the town centre boundary to exclude the Station area to the north and the area to the west of the centre along St John's Hill not currently occupied by main town centre uses;
- removal of the Asda, Boots and Lidl store from the CSF and re-designation as SSF; and
- a new policy criterion to consider sub-division and whether resulting commercial space is fit for purpose.

Putney Town Centre

9.34 The strategic priorities for Putney Town Centre are:

- maintaining its status as a Major Centre in the London Hierarchy;
- reducing the relatively high vacancy rate;
- increasing the centre's expenditure retention within the affluent local catchment area building on it relatively high market positioning;
- enhancing the centre's comparison goods offer, particularly within Putney Exchange to anchor the rest of the centre
- maintaining a mix of retail and other uses, providing a balance between day-time and evening uses;
- Maximising the benefits of linkages to the River and environmental improvements to assist pedestrian movement and mitigate the impact of traffic congestion; and
- in the longer term identifying opportunities for small scale intensification, including residential and office uses on upper floors.

9.35 No expansion of the Putney town centre boundary is recommended and a more restrictive approach in the CSF would be inappropriate. Potential options to be considered for Putney are:

- re-designation of some of the SSFs to Other Frontages e.g. SSFs along Upper Richmond Road;
- deletion of some of the Other Frontages and a contraction of the town centre boundary, e.g. on Upper Richmond Road the most peripheral frontages (east and west);
- a new policy criterion to consider sub-division and whether resulting commercial space is fit for purpose.

Tooting Town Centre

9.36 The strategic priorities for Tooting Town Centre are:

- maintaining its status as a Major Centre in the London Hierarchy;
- maintaining the relatively low vacancy rate;
- increasing the centre's expenditure retention within the diverse local catchment area;
- maintaining the diverse mix of independent traders, supported by the popular indoor markets, which provides additional flexibility for day time and evening time uses;
- enhancing the centre's strong evening/night-time economy;
- environmental improvements to assist pedestrian movement, mitigate the impact of traffic congestion and improve shop frontages; and
- in the longer term identifying opportunities for small scale intensification, including residential and office uses on upper floors.

9.37 No amendments to the Tooting town centre boundary are recommended and there is no basis to extend or contract the CSF. No changes to the policy approach area recommended in Tooting other than a new policy criterion to consider sub-division and whether resulting commercial space is fit for purpose.

Wandsworth Town Centre

9.38 The strategic priorities for Wandsworth Town Centre are:

- maintaining its status as a Major Centre in the London Hierarchy;
- reducing the relatively high vacancy rate including reoccupation of the former Debenhams unit and the successful occupation of the Ram Quarter development;
- maintaining the centre's high expenditure retention within its affluent local catchment area;
- regeneration and improvements to the area to the north of the centre to improve linkages to the River;
- maintaining and if possible enhancing the centre's comparison goods offer, particular multiple operators to serve a wide catchment area;
- maintaining and enhancing the centre's strong evening/night-time economy;
- environmental improvements to assist pedestrian movement and mitigate the impact of traffic congestion including implementation of the proposed one-way system; and
- in the longer term identifying opportunities for major mixed use development, including residential and office uses on upper floors.

9.39 No amendments to the Wandsworth town centre boundary are recommended and there is no basis to extend or contract the CSF. Potential options to be considered for Wandsworth are:

- increase the minimum retained Class A1 threshold in the CFS from 70% to 80%; and
- a new policy criterion to consider sub-division and whether resulting commercial space is fit for purpose.

Future monitoring

9.40 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides an overview of the potential need for further retail development in the medium term to 2030. Very long-term projections up to 2040 are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. These uncertainties include the longer-term implications of the Covid-19 crisis that will need to be carefully monitored. Longer-term projections after 2030 should be treated with caution and provide broad guidance only. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Methodology

Floorspace capacity assessment – Methodology and data

Price base

All monetary values expressed in this update report are at 2018 prices, consistent with Experian's base year expenditure figures for 2018 (Retail Planner Briefing Note 17, February 2020) which is the most up to date information available.

Retail and food/beverage expenditure

The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison, convenience goods and food/beverage for each of the study area zones for the year 2018 have been obtained.

Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 17) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes several macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

Experian's EBS growth forecast rates for 2018 to 2021 reflect the current economic circumstances (but not the coronavirus pandemic) and provide realistic growth rates for the short term, as follows:

- for convenience goods: -0.4% for 2018 to 2019, 0% for 2019 to 2020 and 0.5% from 2020 to 2021;
- for comparison goods: 3.9% for 2018 to 2019, 3.0% for 2019 to 2020 and 3.2% from 2020 to 2021;
- for leisure: -0.5% for 2018 to 2019, 0.9% for 2019 to 2020 and 1.0% from 2020 to 2021.

These short term forecast, particularly for comparison goods and leisure, now seem optimistic in the light of the coronavirus crisis.

In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium term growth average forecasts have been adopted (2022 to 2026), as follows:

- 0.1% per annum for convenience goods after 2021;
- 3.2% per annum growth for comparison goods after 2021; and
- 1.2% per annum for food/beverage after 2021.

These growth rates represent a realistic forecast annual average for future expenditure growth. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV will continue and will effect retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2018 was:

- 12.8% of convenience goods expenditure; and
- 22.3% of comparison goods expenditure.

Experian predicts that these figures will increase in the future. However, Experian recognises that not all non-store expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian provides adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2018 were:

- 3.8% of convenience goods expenditure; and
- 16.8% of comparison goods expenditure.

The projections provided by Experian suggest that these percentages could increase to 6.7% and 25.4% by 2035 respectively. These figures have been adopted in this updated assessment.

This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future to review future policies and development allocations.

On-line shopping has experienced rapid growth since the late 1990s. The latest available data suggests it now forms a significant percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow.

The growth in SFT has an will continue to reduce the demand for retail space. Some retailers operate on-line sales from their traditional retail premises e.g. food store operators. The growth in on-line sales may not always mean there is a proportionate reduction in the need for retail floorspace. However, on-line sales and click and collect activity will assist in allowing retail operators to increase their sales/turnover density rather than increasing the need for traditional floorspace. Given the likely continued growth in home/internet/click and collect shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure. Appropriate deductions for SFT have been made and growth in sales/turnover densities has been assumed, as recommended by Experian.

Market shares/penetration rates

The total turnover of shops and food/beverage outlets has estimated based on penetration rates. These turnover estimates are based on population and expenditure information.

For convenience goods shopping actual turnover estimates are compared with average company benchmark or average sales floorspace densities derived from GlobalData 2019 information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Turnover sales densities

Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Global Data. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a

useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

Information on sales floorspace within the main food stores has been obtained from the Institute of Oxford Retail Consultants (ORC) StorePoint database. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre and Lichfields' experience of trading levels of small independent shops informed by household shopper surveys elsewhere, an average sales density of £6,000 per sq.m net for convenience shops/stores was adopted in the 2013 retail study (2011 prices). This has been inflated to £7,000 per sq.m net to reflect the change in 2011 to 2018 prices in this report and growth in turnover efficiencies.

Increases in turnover densities

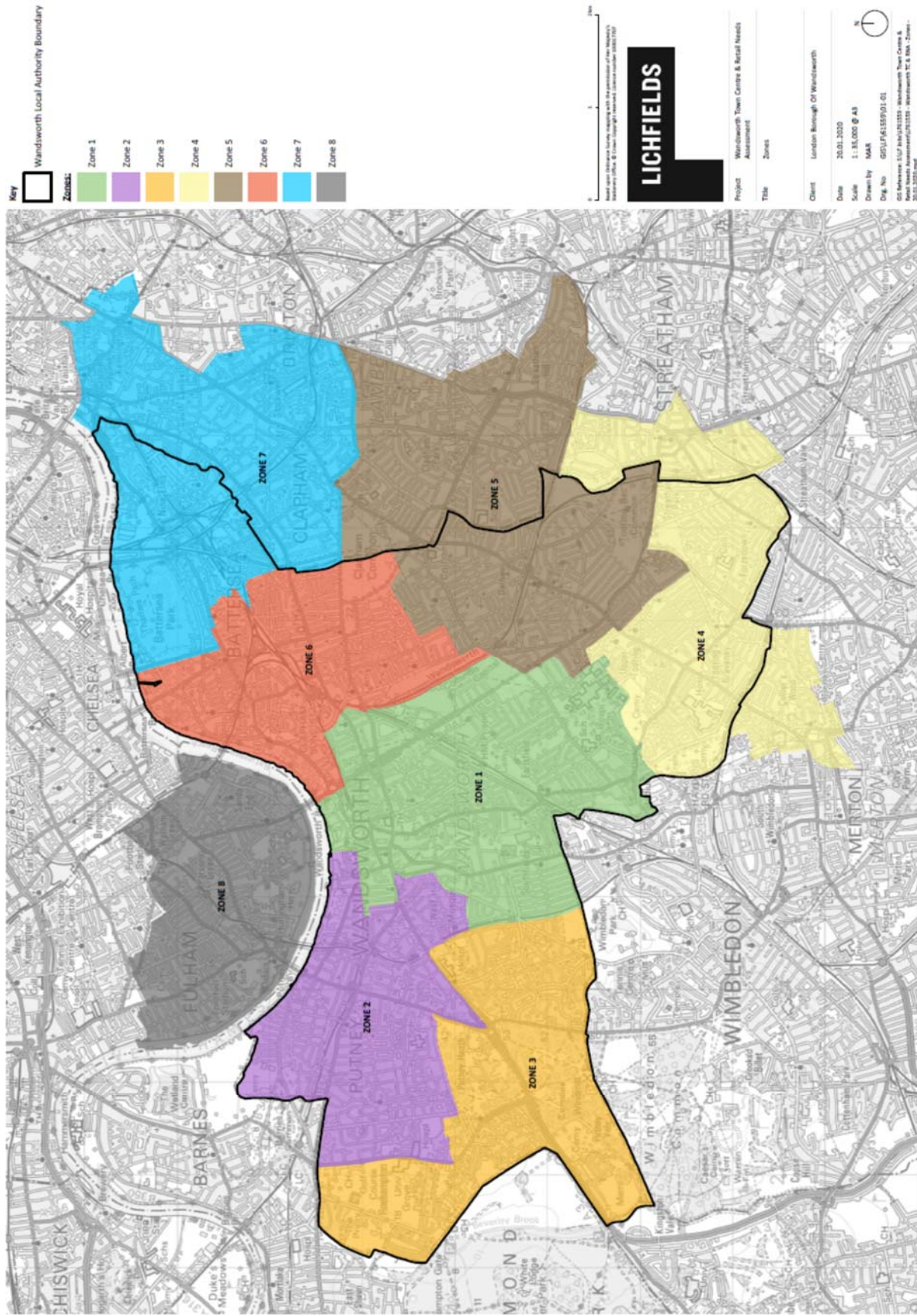
Experian's Retail Planner Briefing Note 17 (February 2020) indicates comparison goods retail sales floorspace is expected to increase its sales density by 3.6% during 2020 and 2021. Between 2022 and 2026 sales is expected to increase by 3.2% per annum, due to a growth in sales and a reduction in sales floorspace, but this will reduce to 2.7% per annum thereafter. If adopted these high increases in sales densities would absorb much of the projected expenditure growth. However, Experian states that their projections reflect national trends and there will be marked differences between local areas.

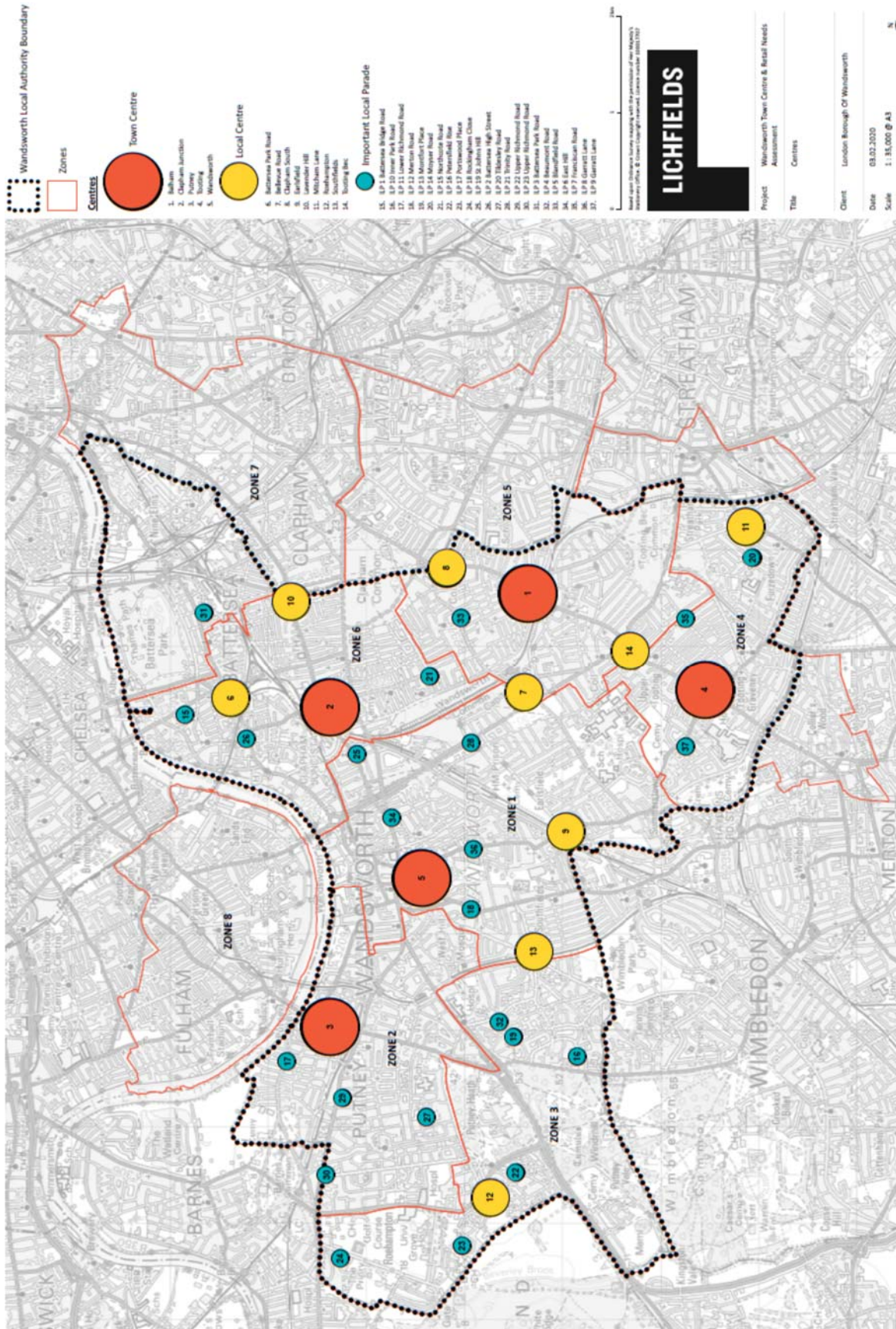
The analysis of local shopping patterns in Wandsworth Borough indicate relatively high existing comparison goods sales densities (around £7,000 per sq. m net). These local circumstances indicate there is less potential for sales densities to increase in line with those implied by national trends, and for these reasons Experian's lower growth rate of 2.7% per annum has been adopted across all time periods.

For convenience goods, Experian indicates sales floorspace is expected to increase its sales density by 0.3% during 2020 and 0.5% during 2021. No growth is forecast after 2021. As with comparison goods retail, the analysis of local shopping patterns in Wandsworth Borough indicate relatively high existing sales densities and there is less potential for sales densities to increase in line with those implied by national trends. For these reasons no growth in convenience goods sales densities has been adopted.

Experian does not provide projections for food and beverage sales densities. An average growth rate of 1% per annum has been adopted, recognising that existing food and beverage businesses will need to increase their turnover in the future to cover increasing costs.

Appendix 2 Study area





Appendix 3 Centre health checks

Balham Town Centre

Balham is located in the east of the Borough and is identified as a ‘District Centre’ in The London Plan. The town centre is focussed on four roads, Balham Station Road, Balham High Road, Bedford Hill and Hildreth Street which create a triangular shopping circuit with a Sainsbury’s store at its heart. The designated centre boundary extends from the railway line in the south 500 metres to Ravenswood Road in the north. There are additional shops and services to the south of the railway line and north of Ravenswood Road, but these are not included within the designated centre boundary. Balham town centre is bounded by residential areas to the north and east, with the railway line running north-west to south-east parallel to Balham Station Road.

Balham town centre’s key roles include:

- convenience shopping – Waitrose and Sainsbury’s stores suitable for main and bulk food shopping. These stores area supported by a baker, butcher, off licences, health food store and newsagents.
- comparison shopping – small independent specialist retailers and charity shops, with a limited number of multiple retailing shops selling a range of higher and lower order comparison goods;
- services – a good range high street national banks/building societies, estate agent’s, cafés, takeaways, travel agents, dry cleaners; and hairdressers/beauty parlours;
- entertainment and evening economy – a good choice of restaurants and pubs/bars; and
- community facilities – including two places of worship, a library, social clubs, two doctors’ surgeries and two dentists.

Mix of use and occupier representation

Balham has a total of 205 retail, service and leisure uses (source: Balham Town Centre Survey 2018) in all frontages. This figure includes 194 Class A1-A5 units. The diversity of Class A1-A5 units within Balham is set out in Table B1, compared with the Goad Plan national average and the GLA Town Centre Data 2017 average for London.

Table B1 - Mix of uses (Class A1 – A5) - Balham

Type	Number units	% units	GLA London average	UK average
A1 convenience	17	8.8	12.8	9.2
A1 comparison	39	20.1	37.7	32.0
A1 services	30	15.5	14.7	14.2
A2 financial services	36	18.6		11.4
A3 restaurants/cafés	32	16.5	14.9	9.9
A4 pubs/bars	6	3.1	3.8	4.8
A5 takeaways	10	5.2	7.4	6.1
Vacant	24	12.4	8.6	12.4
Total	194	100.0	100.0	100.0

Source: Balham Town Centre Survey 2018, GLA 2017 London Town Centre Data and Experian Goad Plan national averages.

Balham has a higher proportion of non-retail service uses compared to the national and London averages. The centre has a significantly lower proportion of comparison retail units. There were 24 vacant retail units within Balham at the time of the Council’s 2018 survey, a vacancy rate (12.4%). The shop vacancy rate is in line with the national average but noticeably higher than the London average.

Balham has a limited selection of comparison shops (39) reflecting its role in the retail hierarchy, primarily as a convenience and service destination. Table B2 provides a breakdown of comparison units by category.

Despite the relatively small number of comparison goods outlets, there are only two categories not represented, but the choice in most categories is limited. Balham has a high proportion of charity shops but a reasonable proportion of clothing/footwear shops for a centre of its size.

Table B2 - Mix of comparison goods uses - Balham

Type	Number Units	% units	UK Average
Clothing and footwear	8	20.5	22.9
Furniture, carpets and textiles	2	5.1	7.5
Books, arts, cards and stationers	2	5.1	7.6
Electrical, music and photography	5	12.8	9.4
DIY, hardware and homeware	3	7.7	6.4
China, glass and gifts	0	0	5.2
Cars, motorcycles and accessories	0	0	1.2
Chemists, drug stores and opticians	4	10.3	11.3
Variety, department and catalogue	1	2.6	1.9
Florists, nurserymen and seedsmen	1	2.6	2.2
Toys, hobby, cycle and sports	1	2.6	5.2
Jewellers	0	0	5.0
Charity and second-hand shops	8	20.5	9.7
Other comparison goods retailers	4	10.3	4.5
Total	39	100.0	100.0

Source: Balham Town Centre Survey 2018 and Experian Goad Plan national averages.

The number of multiple comparison retailers (excluding charity shops) is relatively limited and reflects Balham's size and role. Most comparison shops are small independent traders. The multiple comparison retailers include:

Table B2 – Balham's comparison multiples

Boots Chemist	Boots Opticians	Carphone Warehouse	EE
JoJo Mama Bebe	O2	Oliver Bonas	TK Maxx
Topps Tiles			

Source: Balham Town Centre Survey 2018

Balham Town Centre has a good range of service uses (114 in total), with only one of the categories not represented (travel agents) as shown in Table B4. The representation of categories is similar to the national average. There are a considerably higher proportion of estate agents/valuers and a relatively low proportion of pubs/bars. However, the centre has a good provision of restaurant and cafés.

Multiple food/beverage outlets include: Costa, Café Nero, Nandos, Pizza Express, Domino's Pizza and McDonald's. The Class A3 use include 15 restaurants, 12 cafés and 5 coffee shops, which provide a good mix of daytime and night time facilities.

Table B4 - Mix of service uses - Balham

Type	Number units	% units	UK Average
Restaurants/cafés	32	29.6	24.1
Fast food/takeaways	10	9.3	14.7
Pubs/bars	6	5.6	11.5
Banks/other financial services	13	12.0	9.5
Betting shops/casinos/amusement	3	2.8	3.4
Estate agents/valuers	20	18.5	8.7
Travel agents	0	0	2.0
Hairdressers/beauty parlours	21	19.4	24.3
Launderettes/dry cleaners	3	2.8	1.8
Sub-total	108	100.0	100.0
Other	6		
Total	114		

Source: Balham Town Centre Survey 2018 and Experian Goad Plan national averages.

Operator requirements

The Requirement List is a published source of information providing known requirements for retail, food/beverage, hotel and leisure operators' space in towns across the country. For Balham, there are 36 listed known retail and leisure operators' requirements, slightly below the average (40) for the five main centres. Many of these requirements are likely to relate to a generic area of search rather than specifically Balham e.g. Lidl. The list of requirements for all five town centres is shown in Appendix 4. The requirements relating to Balham include 13 Class A1 retail and service uses, 12 Class A3/A4/A5 food/beverage uses and 10 D1/D2 leisure/ community uses.

Commercial rents

According to the VOA, Zone A retail rents vary significantly throughout the centre. Along the Balham High Road primary frontage Zone A rents of £870 per sq.m are achieved. Zone A rents have increased from £850 per sq.m in 2010 to £870 per sq.m in 2017. Zone A rents are much lower in the peripheral parts of the centre (£300 to £450 per sq.m). The centre has the lowest prime pitch rental levels of the five centres in the Borough.

In the more peripheral parts of Balham High Road Zone A rents range from £415 to £840. Along Bedford Hill rents range from £300 to £725 per sq.m. In Hildreth Street rents range from £450 to £550. Rents are lower in Balham Station Road. Overall the centre provides a good mix of affordable to more expensive prime pitch premises.

Catchment area

Balham's local catchment area includes Balham, Nightingale and Bedford wards. These wards have low levels of relative deprivation as indicated in the Wandsworth Local Plan Core Strategy with a Relative Deprivation Assessment score of 11 or lower. The local catchment is relatively affluent.

The household survey results indicate 31% of respondents across the study area had used shops and services in Balham in the last year, which was the lowest percentage for the five main town centres in the Borough. However, 82% living in the local area (Zone 5) had visited the centre. Only 2% of respondents indicated they do most of their non-food shopping in Balham, which was the lowest for the five main town centres. The retail capacity analysis suggests Balham attracts the vast majority of its trade (77%) from Zone 5. The centre has a relatively localised catchment area when compared with other town centres in the Borough.

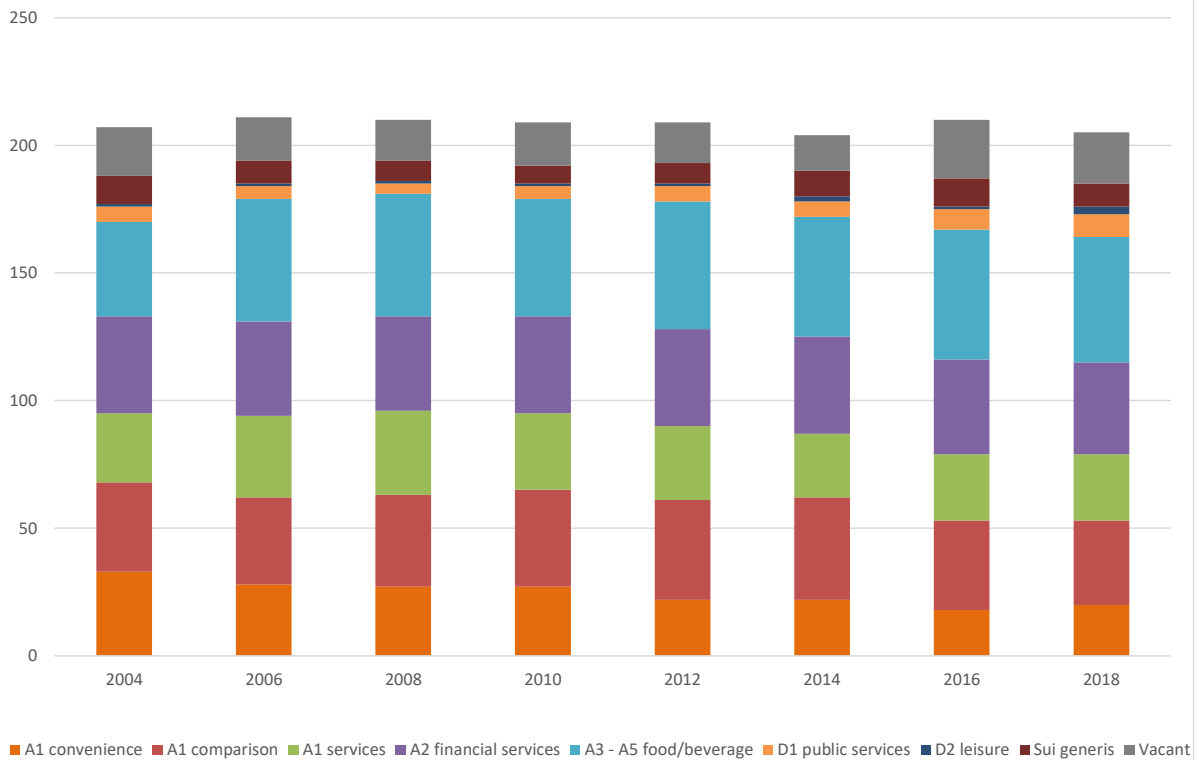
Expenditure leakage from Zone 5 is 47% for convenience goods; 86% for comparison goods and 73% for food/beverage expenditure, which are the lowest retention rates in the Borough.

Past trends

The change in the mix of retail and leisure uses within Balham is shown below (source: Wandsworth Council Town Centre Surveys). The total number of retail and leisure uses remained relatively constant between 2004 and 2018, as has the number of vacant units. The key change over the period was the decrease in the number of convenience goods shops (-39% fall from 2004 to 2018). The number of evening economy uses including restaurants/bars increased between 2004 and 2006 but have remain relatively unchanged in recent years. All other uses have remained broadly constant. Balham has experienced the least change since 2004 when compared with the other four town centres in the Borough.

Balham Town Centre - retail, service and leisure units by Use Class

	2004	2006	2008	2010	2012	2014	2016	2018
A1 convenience	33	28	27	27	22	22	18	20
A1 comparison	35	34	36	38	39	40	35	33
A1 services	27	32	33	30	29	25	26	26
A2 financial services	38	37	37	38	38	38	37	36
A3 - A5 food/beverage	37	48	48	46	50	47	51	49
D1 public services	6	5	4	5	6	6	8	9
D2 leisure	1	1	1	1	1	2	1	3
Sui generis	11	9	8	7	8	10	11	9
Vacant	19	17	16	17	16	14	23	20
Total	207	211	210	209	209	204	210	205



Source: Wandsworth Council Land Use Surveys

New London Plan indicators

The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Balham's designations are:

- Network classification: District centre
- Night-time classification: None
- Commercial growth potential: Medium (moderate levels of retail, leisure or office demand)
- Residential growth potential: High
- Office guidelines: C (protect small office capacity)
- Strategic area for regeneration: No

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Balham in the last year. Of those who had used shops/services in Balham, respondents were asked what they like and dislike about Balham town centre. Similar to the four other town centres, 36% like Balham because of its proximity to where they live. The main factors mentioned (5% of respondents or more) were:

- *factors liked:* good range of shops (12%); good supermarkets (12%); easy to walk/cycle to (11%); good choice of shops in general (8%); good car parking (8%); nice environment (8%); good bus service (8%); friendly atmosphere (7%) and easy to get to by car (5%).
- *factors disliked:* poor choice of shops in general (11%); traffic congestion (7%); shops too expensive (6%) and poor car parking (5%).

The results suggest there are mixed views regarding the choice of shops and the adequacy of car parking. Balham rates favourably in terms of environmental factors when compared with the other four town centres.

Stakeholder feedback

A selection of stakeholders were asked about their views on town centres in the Borough. Four proformas were returned relating to Balham. Three of these stakeholders described Balham's current trading performance as "poor" or "very poor" and "declining". One described performance as "steady" and "satisfactory". The key strengths and weakness suggested were:

- *Strengths:* free car parking for 2 hours; diverse customer base; sense of community; historic buildings; good food shopping; independent shops; Hildreth market; public realm improvements; proximity to the Commons; community activities; good public transport.
- *Weaknesses:* lack of Council enforcement; street clutter; need a broader customer age profile; restrictions on advertising A-boards; too many charity shops; too many coffee shops; few independent traders left; lack of sports shops; limited benches; high rents/rates; lack of links between the council and businesses; and lack of car and cycle parking.

Accessibility

The household survey results suggest Balham attracts customers by a variety of means of transport. Mode of travel for food shopping with the local area (Zone 5) is similar to the study area average with the highest proportions doing their main food shopping by car (42%) or walking (40%). For non-food shopping, Balham attracts a good mix of car, bus, train/underground and walking customers, which suggests high levels of accessibility. The survey results also indicated a slightly higher level of satisfaction with car parking provision

than dissatisfaction (8% compared with 5%). More respondents mentioned bus services as a positive rather than a negative factor (8% compared with 2%).

Balham has high public transport accessibility, being serviced by both an underground and rail station. Balham railway station is located at the southern end of the centre adjacent to Balham Station Road. The station is managed by Southern Trains and provides regular direct trains to a number of destinations including London Victoria, London Bridge, Crystal Palace, Clapham Junction, Wandsworth Common, West Croydon and Sutton. Balham underground station is located adjacent to the railway station on London Underground's Northern Line with regular direct services to Central London, Kings Cross St. Pancras and North London.

Many bus routes have stops in Balham town centre. Several bus stops are located along Balham High Road and Bedford Hill, including bus numbers 155, 315, 355, 255 and 249. There are at least four bus routes providing access to and from Balham from surrounding areas in the Borough and beyond. The bus routes connect Balham with many destinations throughout London including Tooting, Mitcham, Crystal Palace, Norwood, Clapham High Street, Elephant & Castle and Brixton. In addition to this, there is one night bus route, N155, providing a service that runs from Aldwych and Morden.

The centre has a number of accessible car parks but the main car park serving the centre is Sainsbury's car park located between Balham Station Road and Bedford Hill which provides 181 spaces. This is a customer car park that offers 2 hours parking for Sainsbury's customers. Waitrose located around the corner from Sainsbury's on Balham High Road also offers customer parking at £2.50 for maximum stay of 2 hours and offers 80 spaces. Finally, there is also a car park at Wandsworth Common Station which offers a flat rate of £7 a day and has a maximum capacity of 24 spaces.

There is also some on-street parking surrounding Balham. Balham falls within 3 parking zones in Wandsworth, areas H1, H2 and H3. These parking zones generally restrict parking to resident permit holders between 9.30am to 5.30pm Monday to Friday and a maximum stay for visitors of 4 hours. At the junction between Bedford Hill and Balham High Road there are a number of Shoppers Pay and Display facilities where permits are not valid, and parking is valid for one hour maximum at a cost of £3.40.

Environment quality

The quality of buildings within Balham is predominantly very good. The architectural continuity of many of the buildings at upper floors is an attractive feature of the centre and enhances the visual amenity of the town. The two Underground entrance buildings are striking and typical of other station buildings along this section of the Northern Line, reinforcing a sense of place. The shopfronts and façades are generally well maintained enhancing the quality of the built environment.

There are several modern buildings which although not of any architectural merit, are well maintained. This includes the building to the rear of the Sainsbury's car park. Generally, Balham town centre has a good physical fabric with a good sense of character. Overall, in the centre the façades including upper parts are well maintained and the shopfronts do not detract from the quality of the built environment, especially where they have incorporated the original features of the building.

There was only limited evidence of graffiti or vandalism within the centre. Overall during the day-time the centre felt safe and there was no evidence of anti-social behaviour or begging. The area does not have any areas of green space, but along Balham High Road there are a number of benches and bins and there are also some small trees spread throughout the centre. Whilst the area was not generally run down there were signs of wear on the street furniture.

There is a high level of traffic flow through the centre and this detracts from the environmental quality of the centre, despite there being an adequate number of pedestrian crossings and wide pavement. Part-pedestrianised Hildreth Street in the centre of Balham offers some relief from high levels of traffic flowing

around the centre and is a pleasant street with tables and chairs from cafés and restaurants spilling out on to the street.

Reported crime

Recorded crime within the Balham Metropolitan Police neighbourhood was 1,625 crimes during 2019, lower than the average for the five town centres of 1,834 crimes. Anti-social behaviour represented 17.8% of total crimes, followed by violent/sexual offences (14.7%) and vehicle crime.

Summary of Balham Town Centre Strengths and Weaknesses

Strengths

- A relatively affluent local catchment.
- Two large supermarkets (Sainsbury's and Waitrose) and good food and grocery provision suitable for both main and top-up food shopping.
- A good range of service facilities including banks and building societies. The provision of estate agents is significantly higher than the national average.
- Many small and interesting independent traders.
- The New London Plan suggests high potential for residential growth.
- Excellent public transport links i.e. rail, underground and bus.
- A reasonably strong evening economy with pubs, bars and restaurants, although the New London Plan does not classify its night-time activity status. Hildreth has a small selection of cafés and the pedestrianised area provides an opportunity for outdoor dining.
- Accessible car parking provision with both the Sainsbury's and Waitrose car parks within easy walking distance of the shops.
- Relatively low levels of recorded crime.

Weaknesses

- The lowest level of expenditure retention within its local catchment area.
- Less range and choice of comparison retailers compared with other competing town centres. There is a small number of multiple retailers.
- A relatively high proportion of charity shops.
- The lowest prime pitch Zone A retail rents of the five main town centres in the Borough, although rents have increased between 2010 to 2017.
- Vacancy rates in line with the UK average but above the GLA London average.
- The New London Plan suggests only potential to protect rather than grow office capacity.
- Traffic congestion has an adverse impact on the shopping environment.

Clapham Junction Town Centre

Clapham Junction is located in the north east of the Borough. Clapham Junction is identified as a ‘Major Centre’ in The London Plan. It is described in the Local Plan Full Review 2018 Issues Document as Europe’s busiest interchange station. The proposal for a Crossrail 2 station presents an opportunity to make more efficient use of the land surrounding the station for residential and commercial development. The town centre is focused around two main cross roads with arteries stretching from the intersections of St. John’s Hill/St. Johns Road and Northcote Road/Battersea Rise. The main supermarkets within the centre are the Asda superstore and Lidl located on Falcon Lane in the North East of the centre, with several other national convenience retailers spread throughout the centre.

Clapham Junction serves a wider catchment of people from beyond Wandsworth Borough, due to the transport interchange being so crucial and busy, and the outer extremities of the centre serve more local needs. Clapham Junction town centre is bounded by residential areas to the south, and east, the railway line to the north and both residential areas and a railway line to the west. Clapham Junction’s key roles include:

- convenience shopping – including newsagents, butchers, bakers, off licences, delicatessens and four health food shops. There are a number of convenience stores including a Tesco Express, Sainsbury’s Local, a Marks & Spencer Simply Food. There are also several supermarkets including Asda, Lidl, Co-op, Waitrose and a food hall in the Marks & Spencer department store;
- comparison shopping – a good proportion of multiple retailing shops selling a range of high and lower order comparison goods;
- services – including a good range of high street national banks/building societies, cafés, restaurants, takeaways, travel agents, dry cleaners, and hairdressers/beauty parlours;
- entertainment and evening economy – including several pubs/bars, two amusement arcades, a theatre and a night club; and
- community facilities – including two places of worship, a nursery school, two libraries, a doctors’ surgery and several dentists.

Mix of uses and occupier representation

Clapham Junction has a total of 321 retail, service and leisure uses (source: Clapham Junction Town Centre Survey 2018) in all frontages. This figure includes 306 Class A1-A5 units. The diversity of Class A1-A5 units within Clapham Junction is set out in Table C1, compared with the Goad Plan national average and the GLA Town Centre Data 2017 average for London.

Table C1 - Mix of Uses (Class A1 – A5) – Clapham Junction

Type	Number units	% units	GLA London average	UK average
A1 convenience	30	9.8	12.8	9.2
A1 comparison	97	31.7	37.7	32.0
A1 services	47	15.4	14.7	14.2
A2 financial services	30	9.8		11.4
A3 restaurants/cafés	55	18.0	14.9	9.9
A4 pubs/bars	20	6.6	3.8	4.8
A5 takeaways	10	3.3	7.4	6.1
Vacant	17	5.6	8.6	12.4
Total	306	100.0	100.0	100.0

Source: Clapham Jct Town Centre Survey 2018, GLA 2017 London Town Centre Data and Experian Goad Plan national averages.

Clapham Junction has a broadly similar mix of A1 uses compared to the national and London averages. There were 17 vacant retail units at the time of the Council's 2018 survey, a vacancy rate of 5.6%. This vacancy rate is lower than the London average and significantly lower than the UK average.

Clapham Junction town centre has a reasonable selection of comparison shops (97 units). Table C2 provides a breakdown of comparison shop uses by goods categories.

Table C2 - Mix of comparison goods uses – Clapham Junction

Type	Number units	% units	UK Average
Clothing and footwear	32	33.0	22.9
Furniture, carpets and textiles	11	11.3	7.5
Books, arts, cards and stationers	5	5.2	7.6
Electrical, music and photography	5	5.2	9.4
DIY, hardware and homeware	6	6.2	6.4
China, glass and gifts	1	1.0	5.2
Cars, motorcycles and accessories	0	0	1.2
Chemists, drug stores and opticians	12	12.4	11.3
Variety, department and catalogue	3	3.1	1.9
Florists, nurserymen and seedsmen	1	1.0	2.2
Toys, hobby, cycle and sports	4	4.1	5.2
Jewellers	2	2.1	5.0
Charity and second-hand shops	6	6.2	9.7
Other comparison goods retailers	9	9.3	4.5
Total	97	100.0	100.0

Source: Clapham Jct Town Centre Survey 2018 and Experian Goad Plan national averages.

All categories, except cars, motorcycles and motor accessories, are represented in the centre. Compared with the national average, the proportion of units in a number of the categories are lower in Clapham Junction. These categories include books, arts, cards and stationers; electrical, music and photography; china, glass and gifts; jewellers; and charity and second hand shops. The proportion of furniture, carpets and textiles, chemists, drug stores and opticians; variety, department and catalogues; and other comparison goods retailers are higher than the national average. Clothing and footwear outlets is above the national average.

The number of multiple comparison retailers is reasonable and reflects Clapham Junction's size and role. The multiple comparison retailers include:

Table C3 – Clapham Junction's comparison multiples

JoJo Mamma Baby	Superdrug	Waterstones	Oliver Bonas
Jack Wills	Boots Chemist	Debenhams	Huttons
TK Maxx	Whistles	Jigsaw	Caudalie

Source: Clapham Jct Town Centre Survey 2018

Clapham Junction has a good range of services with all categories represented as shown in Table C4. There are higher than average proportions of restaurants/cafés, pubs/bars, estate agents/valuers and dry cleaners. Fast food takeaways, betting shops, casino/amusements, travel agents and hairdressers are all below the national average.

Table C4 - Mix of service uses – Clapham Junction

Type	Number units	% units	UK Average
Restaurants/cafés	55	36.2	24.1
Fast food/takeaways	10	6.6	14.7
Pubs/bars	20	13.2	11.5
Banks/other financial services	12	7.9	9.5
Betting shops/casinos/amusement	4	2.6	3.4
Estate agents/valuers	14	9.2	8.7
Travel agents	2	1.3	2.0
Hairdressers/beauty parlours	29	19.1	24.3
Launderettes/dry cleaners	6	3.9	1.8
Sub-total	152	100.0	100.0
Other	10		
Total	162		

Source: Clapham Junction Town Centre Survey 2018 and Experian Goad Plan national averages.

Operator requirements

The Requirement List is a published source of information providing known requirements for retail, food/beverage, hotel and leisure operators' space in towns across the country. For the Clapham/Battersea area, there are 44 listed known retail and leisure operators' requirements, slightly above the average (40) for the five main centres. The list of requirements for all five town centres is shown in Appendix 4. The requirements relating to Clapham/Battersea include 13 Class A1 retail and service uses, 17 Class A3/A4/A5 food/beverage uses and 13 D1/D2 leisure/community uses.

Commercial rents

According to the VOA, Zone A retail rents vary throughout the centre. Along St John's Hill they vary from around £475 per sq.m to £2,000 per sq.m. Zone A rents range from £1,000 to £2,000 per sq.m in the prime pitch. Zone A rents have increased from £1,700 per sq.m in 2010 to £2,000 per sq.m in 2017. The centre has the highest prime pitch rental levels of the five centres in the Borough. Zone A rents are much lower in the peripheral parts of the centre (£300 to £695 per sq.m).

Zone A rents are also relatively strong in St John's Road ranging from £950-1,450 per sq.m and also in Northcote Road (£695-£1,175 per sq.m). Along St Lavender Hill levels are lower at £300-900 per sq.m.

Catchment area

Clapham Junction's local catchment area includes Latchmere, Northcote and Shaftsbury wards. Latchmere has high levels of relative deprivation as indicated in the Wandsworth Local Plan Core Strategy with a Relative Deprivation Assessment score of over 16. Northcote and Shaftsbury wards have relatively low levels of deprivation. The local catchment is mixed in terms of affluent and deprivation.

The household survey results indicate 60% of respondents across the study area had used shops and services in Clapham Junction in the last year, which is the highest percentage for the five main town centres in the Borough. Nearly 92% living in the local area (Zone 6) had visited the centre. Only 5% of respondents indicated they do most of their non-food shopping in Clapham Junction, but this is the second highest percentage after Wandsworth Town. The retail capacity analysis suggests Clapham Junction attracts less than half its trade (46%) from Zone 6. The centre has a relatively wide catchment area when compared with other town centres in the Borough.

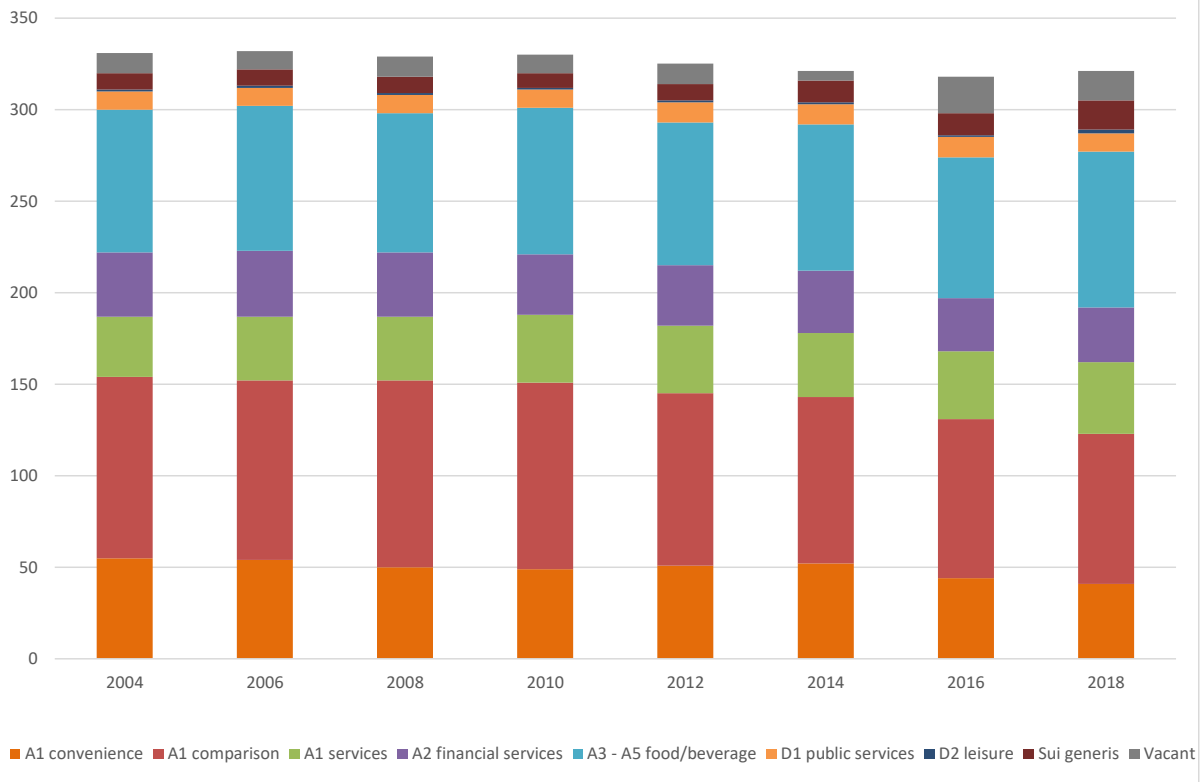
Expenditure leakage from Zone 6 is 40% for convenience goods; 75% for comparison goods and 71% for food/beverage expenditure, which are relatively low retention rates when compared with other zones in the Borough.

Past trends

The change in the mix of retail and leisure uses within Clapham Junction is shown below (source: Wandsworth Council Town Centre Surveys). The total number of retail and leisure uses has fallen since 2010 and fell by -3% between 2004 and 2018. The number of vacant units has risen sharply since 2014, however the vacancy rate remains relatively low in 2018. The key changes over the period was the decrease in the number of convenience (-14 units) and comparison (-17) goods shops and Class A2 financial services (-5). These reductions have been partially offset by the increase in A1 services, A3-A5 food/beverage outlets and sui generis uses. The number of evening economy uses including restaurants/bars increased sharply between 2016 and 2018.

Clapham Junction Town Centre - retail, service and leisure units by Use Class

	2004	2006	2008	2010	2012	2014	2016	2018
A1 convenience	55	54	50	49	51	52	44	41
A1 comparison	99	98	102	102	94	91	87	82
A1 services	33	35	35	37	37	35	37	39
A2 financial services	35	36	35	33	33	34	29	30
A3 - A5 food/beverage	78	79	76	80	78	80	77	85
D1 public services	10	10	10	10	11	11	11	10
D2 leisure	1	1	1	1	1	1	1	2
Sui generis	9	9	9	8	9	12	12	16
Vacant	11	10	11	10	11	5	20	16
Total	331	332	329	330	325	321	318	321



Source: Wandsworth Council Land Use Surveys

New London Plan indicators

The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Clapham Junction's designations are:

- Network classification: Major centre
- Night-time classification: NT2 (regional/sub-regional significance)
- Commercial growth potential: Medium (moderate levels of retail, leisure or office demand)
- Residential growth potential: High
- Office guidelines: B (mixed-use office potential)
- Strategic area for regeneration: Yes

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Clapham Junction in the last year. Of those who had used shops/services in Clapham Junction, respondents were asked what they like and dislike about the town centre. Similar to the four other town centres, 36% like Clapham Junction because of its proximity to where they live. The main factors mentioned (5% of respondents or more) were:

factors liked: good choice of shops in general (18%); good bus services (16%); good range of shops (13%); good supermarkets (9%); easy to walk/cycle to (7%); easy to get to by car (7%); friendly atmosphere (7%); nice environment (5%); good car parking (5%); and good choice of clothing shops (5%).

factors disliked: traffic congestion (12%); poor choice of shops in general (10%); poor shopping environment (7%); poor choice of clothing shops (7%); poor car parking (6%) and poor cleanliness/maintenance (5%).

The results suggest there are mixed views regarding the choice of shops and the adequacy of car parking. Clapham Junction rates less favourably in terms of environmental factors when compared with the other town centres, apart from Tooting.

Stakeholder feedback

A selection of stakeholders were asked about their views on town centres in the Borough. Four proformas were returned relating to Clapham Junction. Three of these stakeholders described Clapham Junction's current trading performance as "satisfactory" and "steady". One described performance as "poor" and "declining". The key strengths and weakness suggested were:

Strengths: busy centre; local population profile; good night-time economy; diverse shopping; mix of multiples and independent traders; high footfall around the station; good transport links; the Business Improvement District (BID); and significant physical potential for redevelopment including the station area.

Weaknesses: potential closure of Debenhams and TK Maxx; poor visual environment; lack of landscaping and places to meet/sit; too much signage/advertisements; high business rates; lack of maps; poor station entrance/concourse; lack of larger shop units; need more pop-up shops; poor air quality; and lack of strategic vision for the centre.

Accessibility

The household survey results suggest Clapham Junction attracts customers by a variety of transport modes. Mode of travel for food shopping within the local area (Zone 6) is similar to the study area average with the highest proportions doing their main food shopping by car (46%) or walking (30%). For non-food shopping, Clapham Junction attracts a good mix of car, bus, train/underground and walking customers, which represents high levels of accessibility. The survey results also indicated similar levels of satisfaction and

dissatisfaction with car parking provision i.e. 5% and 6% respectively. However, more respondents mentioned bus services as a positive rather than a negative factor (16% compared with less than 1%). Clapham Junction was the most highly rated in terms of good bus services in the Borough's main centres.

Clapham Junction is served by a variety of buses routes which are mostly located along St John's Hill, St John's Road, Northcote Road and Battersea Rise. The main bus routes going through the area include 156, 295, 37 and C3 amongst others.

Clapham Junction has excellent transport accessibility, being serviced by both over-ground rail services and an underground station. Clapham Junction Station is located at the northern end of the centre near the junction of St. Johns Hill and Falcon Road but retains a good feeling of centrality within the town centre. The station is managed by South West Trains and provides regular direct trains to a number of suburban and national rail network destinations including London Waterloo, London Victoria, London Bridge, Canada Water, Croydon, Gatwick Airport and Eastbourne.

The town centre also has a number of accessible car parks but the main car park for serving the area is the Asda car park located off Falcon Lane. This allows two hours free parking for customers and then is £2 an hour after that. There are further privately operated car parks at Lidl and Boots in the Falcon Lane area, which are for customers only, as well as Clapham Junction Approach Car Park near to Clapham Junction station. There is also a range of on-street parking available around Clapham Junction Town Centre. The area surrounding Clapham Junction falls within three different parking zones in Wandsworth, areas C1, C2 and J where pay and display is required, and varying restrictions apply. Charges for pay and display for on street parking vary dependent on the zone and maximum stay, but typically one or two hour maximum stay zones are £3.40 per hour.

Environment quality

The main primary shopping area is located along St Johns Road and in a cluster on Falcon Way. The primary shopping area has a mix of national and independent retailers. The secondary shopping areas are located along Northcote Road and Battersea Rise and are made up predominantly of smaller independent outlets.

The quality of buildings within Clapham Junction town centre is predominantly very good. The historic buildings are an attractive feature of the centre and enhance the attraction of the town. The Arding & Hobbs building, currently occupied by Debenhams, is a landmark within Clapham Junction and imposes itself with an Edwardian baroque composition of red brick and stone. This high quality of architecture is continued down St. John's Road. Along St. John's Hill the red brick massing of The Grand Theatre dominates the environment, and the Grade II listed building adds significant architectural quality to the environment.

There are a number of modern buildings which, although well maintained, are not particularly attractive such as the building on the corner of Falcon Lane and Falcon Road and retail warehousing on Falcon Lane. Generally, façades are well maintained and the shopfronts do not detract from the quality of the built environment. The buildings along Northcote Road are also predominantly attractive buildings, although there are several retail units with features not in context with the historic nature of the centre, such as the Somerfield building.

There was only limited evidence of graffiti or vandalism within the centre. Overall, during the day-time the centre felt safe and there was no evidence of anti-social behaviour or begging. The centre has limited green spaces, but along St John's Road there are a number of small seating areas with benches, bins, bicycle stands and some small trees.

Clapham Junction was one of the locations affected by the London Riots in August 2011. Following this, investment has been injected into the public realm which has further improved the environmental quality within Clapham Junction.

Reported crime

Recorded crime within the Clapham Junction Metropolitan Police neighbourhood was 2,593 crimes during 2019, the highest of the five town centres in the Borough. Anti-social behaviour represented 17.8% of total crimes, followed by violent/sexual offences (14.7%) and vehicle crime.

Summary of Clapham Junction Strengths and Weaknesses

Strengths

- A relatively wide catchment area when compared with other town centres in the Borough.
- A good selection of comparison shops, with high quality multiple retailers for a centre of its size including Marks & Spencer and Debenhams department stores.
- A good mix and balance of non-retail services and uses.
- Four large food stores (Asda, Lidl, Waitrose and Co-op) along with a food hall in the Marks & Spencer store. These are complimented by a Tesco Express, Sainsbury's Local, Marks & Spencer Simply Food store and a UK Line store ensuring convenience shopping provision is suitable for both main and top up food shopping.
- A good range of evening uses including the Battersea Arts Centre, which provides a range of art and entertainment. The centre also has a strong provision of restaurants, cafés and takeaways, which are higher than the national average. The New London Plan classifies the night-time activity as NT2 (regional/sub-regional significance).
- The New London Plan suggests high potential for residential growth and mixed use office potential.
- The vacancy rate is substantially lower than the UK average and lower than the GLA London average, which suggests demand for premises is still reasonably strong.
- The highest prime pitch Zone A retail rents of the five main town centres in the Borough and rents have increased between 2010 to 2017.
- Excellent public transport links with both the train station and buses. The implementation of Crossrail2 will further enhance public transport accessibility.

Weaknesses

- There is limited car parking, mitigated by excellent public transport links.
- There are a significantly lower proportion of banks and other financial services in Clapham Junction when compared with the national average.
- The highest recorded crime of the five town centres in the Borough.
- Limited green spaces and landscaped areas.

Putney Town Centre

Putney is located in the west of the Borough and is identified as a 'Major Centre' in The London Plan. Putney has a long history, largely due to its point as a river crossing. It was used as a crossing point by ferry in the early 1300s and the first permanent bridge was completed in 1729 and the bridge that stands today was built in 1886. Putney has a historic core, with the majority of the buildings along Putney High Street being Georgian or Victorian.

The centre serves shoppers from Wandsworth Borough and beyond and is "T" shaped, with the majority of the retail offer located on Putney High Street, which runs north to south, and further retail located on Upper Richmond Road which runs east to west. The Wandsworth Core Strategy designates the core shopping area for Putney as the Putney Exchange and the area adjacent to it. The town centre is bounded by the River Thames to the north and residential areas to the south, west and east. The railway line dissects the centre, just to the north of Upper Richmond Road.

The key roles of Putney include:

- convenience shopping: three supermarkets operated by Sainsbury's, Waitrose and Co-op, supported by baker's, delicatessens, health food stores, newsagents and various top up convenience stores including a Sainsbury's Local and Tesco Express and a food hall in the Marks & Spencer store;
- comparison shopping: offers a good mix of national multiple and independent retailers selling a range of high and lower order comparisons. Shops include Marks & Spencer, two Waterstone's, Argos, Topshop and Robert Dyas;
- services: provides a good range of high street national banks/building societies, cafes, restaurants, takeaways, travel agents and hairdressers/beauty parlours;
- entertainment and evening economy: including several pubs, two amusement arcades, a number of betting offices, a theatre and a cinema; and
- community facilities: provides four places of worship, a library, several health centres and dental surgeries.

Mix of uses and occupier representation

Putney has a total of 303 retail, service and leisure uses (source: Putney Town Centre Survey 2018) in all frontages. This figure includes 293 Class A1-A5 units. The diversity of Class A1-A5 units within Putney is set out in Table P1, compared with the Goad Plan national average and the GLA Town Centre Data 2017 average for London.

Table P1 - Mix of Uses (Class A1 – A5) – Putney

Type	Number Units	% units	GLA London Average	UK average
A1 convenience	27	9.2	12.8	9.2
A1 comparison	75	25.6	37.7	32.0
A1 services	54	18.4	14.7	14.2
A2 financial services	37	12.6		11.4
A3 restaurants/cafés	43	14.7	14.9	9.9
A4 pubs/bars	8	2.7	3.8	4.8
A5 takeaways	11	3.8	7.4	6.1
Vacant	38	13.0	8.6	12.4
Total	293	100.0	100.0	100.0

Source: Putney Town Centre Survey 2018, GLA 2017 London Town Centre Data and Experian Goad Plan national averages.

Putney has a broadly a similar mix of A1 uses compared to the national and London averages. There were 38 vacant units within Putney at the time of the Council's 2018 survey, equating to a vacancy rate of 13%, which is slightly above both the London and UK average.

Table P2 - Mix of comparison goods uses – Putney

Type	Number units	% units	UK Average
Clothing and footwear	19	25.3	22.9
Furniture, carpets and textiles	4	5.3	7.5
Books, arts, cards and stationers	4	5.3	7.6
Electrical, music and photography	9	12.0	9.4
DIY, hardware and homeware	9	12.0	6.4
China, glass and gifts	1	1.3	5.2
Cars, motorcycles and accessories	0	0.0	1.2
Chemists, drug stores and opticians	9	12.0	11.3
Variety, department and catalogue	3	4.0	1.9
Florists, nurserymen and seedsmen	1	1.3	2.2
Toys, hobby, cycle and sports	3	4.0	5.2
Jewellers	2	2.7	5.0
Charity and second-hand shops	7	9.3	9.7
Other comparison good retailers	4	5.3	4.5
Total	75	100.0	100.0

Source: Putney Town Centre Survey 2018 and Experian Goad Plan national averages.

Putney has a good selection of comparison shops (75 units). Table P2 provides a breakdown of comparison shop units by category. The proportion of retailers is broadly similar to the national average with all categories represented. Putney town centre has a larger proportion of clothing and footwear; electricals, music and photography; DIY, hardware and homewares; chemists, drug stores and opticians; variety and department stores; and other comparison goods retailers. However, furniture, carpets and textiles; books, arts, cards and stationers; china, glass and gifts; cars, motorcycles and accessories; florists; toys, hobby, cycle and sports; jewellers; and charity shops were all noticeably below the national average.

The number of multiple comparison retailers is reasonable and reflects Putney's size and role. The multiple comparison retailers include:

Table P3 – Putney's comparison multiples

Huttons	Gap	Oliver Bonas	Vodafone
H&M	Boots Opticians	Casa Manolo	Robert Dyas
Laura Ashley Home	TK Maxx	Jaki	Mountain Warehouse

Source: Putney Town Centre Survey 2018

Putney has an excellent range of service uses (153 units), with all of the categories represented as shown in Table P4. The representation of categories is similar to the national average. However, there are considerably higher proportions of restaurants/cafés, estate agents /valuers and laundrettes/dry cleaners. The proportion of fast food takeaways, pubs/bars, banks, betting shops, travel agents and hairdressers are all below the national average.

Table P4 - Mix of service uses – Putney

Type	Number units	% units	UK Average
Restaurants/cafés	43	31.2	24.1
Fast food/takeaways	11	8.0	14.7
Pubs/bars	8	5.8	11.5
Banks/other financial services	11	8.0	9.5
Betting shops/casinos/amusement	4	2.9	3.4
Estate agents/valuers	22	15.9	8.7
Travel agents	1	0.7	2.0
Hairdressers/beauty parlours	31	22.5	24.3
Launderettes/dry cleaners	7	5.1	1.8
Sub-total	138	100.0	100.0
Other	15		
Total	153		

Source: Putney Town Centre Survey 2018 and Experian Goad Plan national averages.

Operator requirements

The Requirement List is a published source of information providing known requirements for retail, food/beverage, hotel and leisure operators' space in towns across the country. For Putney there are 51 listed known retail and leisure operators' requirements, the highest for the five main centres. The list of requirements is shown in Appendix 4. The requirements relating to Putney include 20 Class A1 retail and service uses, 16 Class A3/A4/A5 food/beverage uses and 14 D1/D2 leisure/ community uses.

Commercial rents

According to the VOA, Zone A retail rents vary throughout the centre. Along the High Street they vary from around £250 per sq.m to £1,250 per sq.m. Zone A rents range from £1,000 to £1250 per sq.m in the prime pitch. Zone A rents did not change between 2010 and 2017. The centre has the second highest prime pitch rental levels of the five centres in the Borough. Zone A rents are much lower in the peripheral parts of the centre (£300 to £400 per sq.m). Within Putney Exchange Shopping Centre Zone A rents range from £750 to £1,000 per sq.m. Along Putney Bridge Road and Upper Richmond Road, Zone A retail rents are lower at £300-400 per sq.m. and £400 per sq.m, respectively.

Catchment area

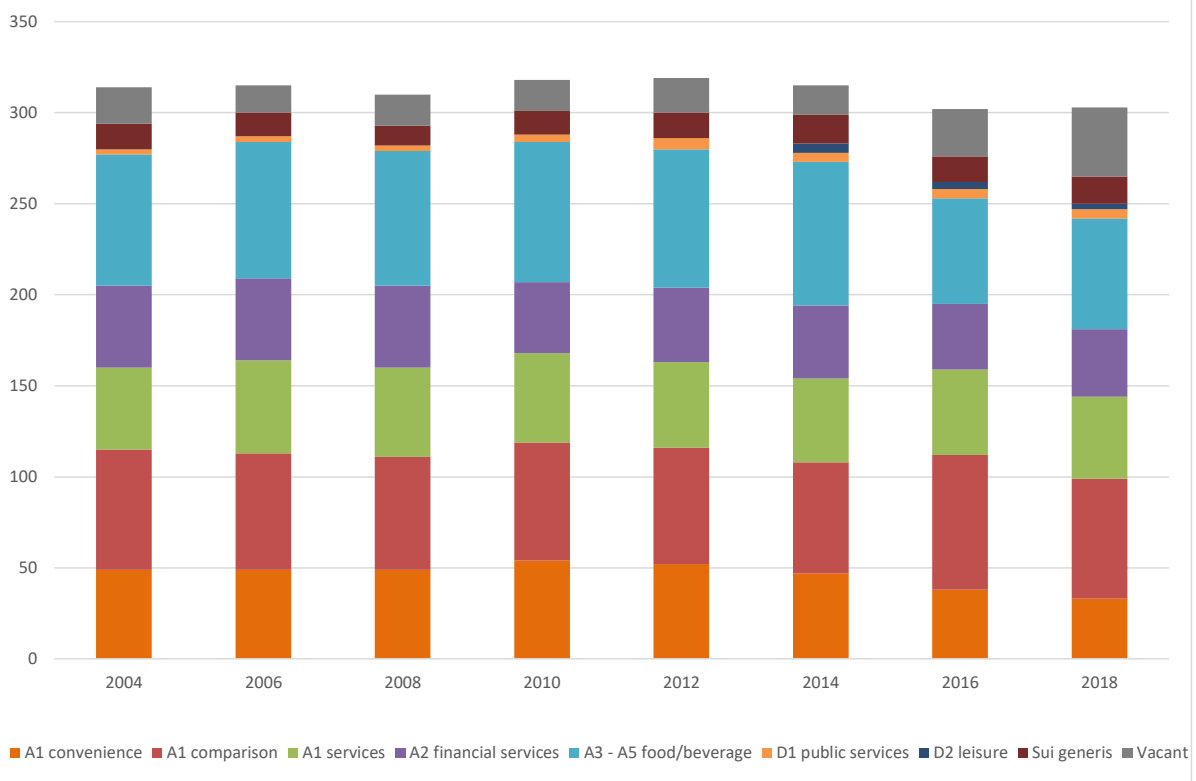
Putney's local catchment area includes Thamesfield and East Putney wards. These wards have very low levels of relative deprivation as indicated in the Wandsworth Local Plan Core Strategy with a Relative Deprivation Assessment score of 6 or lower. The local catchment is the most affluent in the Borough. The household survey results indicate 32% of respondents across the study area had used shops and services in Putney in the last year, which is the second lowest percentage for the five main town centres in the Borough, but 87% living in the local area (Zone 2) had visited the centre. Only 4.3% of respondents indicated they do most of their non-food shopping in Putney, which is comparable with Tooting but lower than Wandsworth Town and Clapham Junction. The retail capacity analysis suggests Putney attracts 60% of its trade from Zone 6. The centre has a relatively localised catchment area when compared with other town centres in the Borough. Expenditure leakage from Zone 2 is 45% for convenience goods; 76% for comparison goods and 53% for food/beverage expenditure, which are similar to most other zones in the Borough.

Past trends

The change in the mix of retail and leisure uses within Putney is shown below (source: Wandsworth Council Town Centre Surveys). The total number of retail and leisure uses has fallen since 2012 and fell by -3.5% between 2004 and 2018. The number of vacant units has risen sharply since 2014, which is the largest increase within the five town centres within the Borough. The key changes over the period were the decrease in the number of convenience (-16 units), Class A2 financial services (-8) and A3-A5 food/beverage outlets (-11), which have resulted in an increase in the vacancy rate and a reduction in the number of units remaining in retail/leisure use. The number of comparison good shops peaked in 2016, suggesting there were a number of temporary or short lived shops around at that time. These reductions have been partially offset by the increase in A1 services, and sui generis uses. The number of evening economy uses including restaurants/bars decreased sharply between 2014 and 2016.

Putney Town Centre - retail, service and leisure units by Use Class

	2004	2006	2008	2010	2012	2014	2016	2018
A1 convenience	49	49	49	54	52	47	38	33
A1 comparison	66	64	62	65	64	61	74	66
A1 services	45	51	49	49	47	46	47	45
A2 financial services	45	45	45	39	41	40	36	37
A3 - A5 food/beverage	72	75	74	77	76	79	58	61
D1 public services	3	3	3	4	6	5	5	5
D2 leisure	0	0	0	0	0	5	4	3
Sui generis	14	13	11	13	14	16	14	15
Vacant	20	15	17	17	19	16	26	38
Total	314	315	310	318	319	315	302	303



Source: Wandsworth Council Land Use Surveys

New London Plan indicators

The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Putney's designations are:

- Network classification: Major centre
- Night-time classification: NT3 (local significance)
- Commercial growth potential: Medium (moderate levels of retail, leisure or office demand)
- Residential growth potential: Medium
- Office guidelines: B (mixed-use office potential)
- Strategic area for regeneration: No

Customer Views

As part of the household survey, respondents were asked if they had used shops and services in Putney in the last year. Of those who had used shops/services in Putney, respondents were asked what they like and dislike about the town centre. Similar to the four other town centres, 37% like Putney because of its proximity to where they live. The main factors mentioned (5% of respondents or more) were:

factors liked: good choice of shops in general (15%); easy to walk/cycle to (14%); nice environment (12%); good bus services (11%); good range of shops (11%); friendly atmosphere (10%) and good quality shops (6%).

factors disliked: traffic congestion (21%); poor choice of shops in general (18%); too many empty shops (13%); poor car parking (9%); poor quality shops (6%); poor shopping environment (6%) and poor choice of independent shops (6%).

The results suggest there are mixed views regarding the choice and quality of shops and the shopping environment. Putney rates least favourably in terms of traffic congestion when compared with the other town centres.

Stakeholder feedback

A selection of stakeholders were asked about their views on town centres in the Borough. Four proformas were returned relating to Putney. All stakeholders described Putney's current trading performance as "declining". Three described performance as "poor" or "very poor", with the other suggesting it is "satisfactory". The key strengths and weakness suggested were:

- *Strengths:* excellent transport links; proximity to Central London; riverside location; good evening economy; loyal customer base;
- *Weaknesses:* traffic congestion; poor shopping environment; reduced footfall; too many betting shops; too many coffee shops; changing customer shopping habits; declining mix of shops; loss of M&S; high rents/rates; high cost and lack of car parking; poor shopfronts/vacant units; lack of local events; fly-posters/graffiti; and street clutter.

Accessibility

The household survey results suggest Putney attracts customers by a variety of modes of transport. Mode of travel for food shopping with the local area (Zone 2) is similar to the study area average with the highest proportions doing their main food shopping by car (43%) or walking (44%). For non-food shopping, Putney attracts a good mix of car, bus and walking customers, which suggests high levels of accessibility. The survey results also indicated higher levels of dissatisfaction with car parking provision than satisfaction i.e. 9% compared with 4%. More respondents mentioned bus services as a positive rather than a negative factor (11% compared with less than 1%).

Putney town centre has excellent public transport accessibility. Putney Railway Station is located in the heart of the centre on Putney High Street, just north of the cross roads with Upper Richmond Road. The station is managed by South West Trains. The station provides regular links to a number of destinations including London Waterloo, Clapham Junction, Wandsworth Town, Reading, Woking, Chertsey and Egham. East Putney Underground Stations is located off Upper Richmond Road on the edge of the town centre boundary and is served by the District Line with services towards Earls Court and Wimbledon.

Putney town centre is served by many bus routes with stops in Putney town centre. Several bus stops are located along Putney High Street, Upper Richmond Road, Putney Bridge Road, Lower Richmond Road and Putney Bridge. Bus routes 430, 74, 37, 337 424 and 85 are amongst the bus routes serving this town centre.

The town centre also has one main accessible car park of 250 spaces within the Putney Exchange Shopping Centre. Here, parking operates by a 'pay on departure' method which costs £3.20 for the first hour and then £4.40 for two hours and £6.00 for three hours. Putney also has parking available at Sainsbury's of 48 spaces which is free for customers for an hour and a half only. There is also on-street pay and display in Putney town centre predominantly on the side roads off the main streets in Putney, where parking is typically for a maximum stay of 2 hours and costs around £3.40 an hour.

Environment quality

The main primary shopping area in Putney town centre is located along Putney High Street and is made up predominantly the Putney Exchange Shopping Centre. The secondary shopping area is located along Upper Richmond Road and also parts of Putney High Street.

The quality of buildings within Putney town centre is largely very good. The historic buildings are an attractive feature of the centre and enhance the attraction of the centre. Putney is characterised by a number of different building styles ranging from historic buildings to the more modern Putney Exchange Shopping Centre. The latter, however, has been designed to complement the historic buildings which dominate Putney High Street.

The traffic flows are heavy along the High Street, which leads onto the south circular, which can inhibit pedestrian movement through the centre. However, there are a number of pedestrian crossings assist pedestrian movement. The Exchange Shopping Centre is traffic free which aids pedestrian movement.

The River Thames runs along the northern edge of the centre, which benefits from more modern waterfront development, whilst maintaining an attractive environmental feature for Putney's centre. The Core Strategy indicates that various public realm improvements for the centre on both the High Street and Upper Richmond Road are planned, which will continue to enhance the environmental quality of the centre in the future.

There was very limited evidence of graffiti or vandalism within the centre, although this was mentioned by some stakeholders. Overall during the day-time the centre felt safe. There was no evidence of anti-social behaviour or begging. The centre has limited open/green spaces, however the River Thames on the northern edge of the centre which provides attractive scenery and walkways.

Reported crime

Recorded crime within the Putney Metropolitan Police neighbourhood was 2,004 crimes during 2019, the second highest of the five town centres in the Borough. Violence and sexual offences accounted for 23.7% of all crime in 2019, followed by anti-social behaviour at 17% and burglary at 13%.

Summary of Putney Town Centre Strengths and Weaknesses

Strengths

- The local catchment is the most affluent in the Borough.
- Three large supermarkets and a good provision of small food and grocery retailers suitable for both main and top up food shopping.
- A healthy mix of national multiple and independent retailers.
- A good range of services facilities with a large number of restaurants, cafés and takeaways, although the New London Plan classifies the night-time activity only as NT3 (local significance).
- The New London Plan suggests mixed use office potential.
- The second highest prime pitch Zone A retail rents of the five main town centres in the Borough, although rents did not improve between 2010 to 2017.
- Excellent public transport links.
- Attractive Thames waterfront.

Weaknesses

- Traffic congestion and poor air quality.
- The proportion of comparison retailers is significantly below the national average and has dropped in recent years.
- Higher vacancy rates compared with the UK and GLA London averages.
- Limited car parking provision.
- The second highest recorded crime of the five town centres in the Borough.
- Limited public open space to meet and rest.

Tooting Town Centre

Tooting is located in the south east of the Borough and is identified as a ‘Major Centre’ in The London Plan. Tooting, like many of the towns in the borough, developed largely in the late Victorian period. Similarly, to Balham it received further investment and development in the late 1920’s and early 1930’s following the opening of Tooting Broadway underground station on the extended Northern Line.

The town centre is focussed on two main roads, Tooting High Street (which becomes Upper Tooting Road) and Mitcham Road. The centre is very linear along these two roads with the core of the centre located at their junction with Tooting Broadway underground station adjacent. The centre is bounded by residential areas on all sides.

The key roles of Tooting include:

- convenience shopping: three main supermarkets operated by Sainsbury’s, Lidl and Co-op, supported by bakers, butchers, delicatessens, grocers, health food stores, newsagents and off licences. There are several top up convenience stores including two Tesco Express stores, Iceland, Londis and a number of independent stores;
- comparison shopping: offers a mix of multiple and independent retailing shops selling a range of high and lower order comparison goods;
- services: provides a very good range of high street national banks/building societies, cafes, restaurants, takeaways, travel agents and hairdressers/beauty parlours;
- entertainment and evening economy: several pubs, two amusement arcades, betting offices, snooker club and bingo hall; and
- community facilities: provides four places of worship, a library, several health centres, a doctors’ surgery and dental surgeries.

Mix of uses and occupier representation

Tooting has a total of 440 retail, service and leisure uses (source: Tooting Town Centre Survey 2018) in all frontages. This figure includes 425 Class A1-A5 units. The number of units includes outlets within Tooting Market (around 80) and Broadway Market (around 50). The diversity of Class A1-A5 units within Tooting is set out in Table T1, compared with the Goad Plan national average and the GLA Town Centre Data 2017 average for London.

Table T1 - Mix of Uses (Class A1 – A5) – Tooting

Type	Number units	% units	GLA London average	UK average
A1 convenience	62	14.6	12.8	9.2
A1 comparison	128	30.1	37.7	32.0
A1 services	52	12.2	14.7	14.2
A2 financial services	45	10.6		11.4
A3 restaurants/cafés	54	12.7	14.9	9.9
A4 pubs/bars	19	4.5	3.8	4.8
A5 takeaways	27	6.4	7.4	6.1
Vacant	38	8.9	8.6	12.4
Total	425	100.0	100.0	100.0

Source: Tooting Town Centre Survey 2018, GLA 2017 London Town Centre Data and Experian Goad Plan national averages.

The centre has a significantly higher than the national average proportion of convenience retailers. There were 38 vacant retail units within Tooting at the time of the Council's survey, equating to a vacancy rate of 8.9% which is similar to the London average but lower than the UK average.

Tooting town centre has an excellent selection of comparison shops (128 units) with only two categories not represented (cars, motorcycles & motor access; and florists, nurserymen & seedsmen). Table T2 below provides a breakdown of comparison shop uses by goods categories.

Table T2 - Mix of comparison goods uses – Tooting

Type	Number units	% units	UK Average
Clothing and footwear	39	30.5	22.9
Furniture, carpets and textiles	2	1.6	7.5
Books, arts, cards and stationers	2	1.6	7.6
Electrical, music and photography	21	16.4	9.4
DIY, hardware and homeware	6	4.7	6.4
China, glass and gifts	5	3.9	5.2
Cars, motorcycles and accessories	0	0.0	1.2
Chemists, drug stores and opticians	11	8.6	11.3
Variety, department and catalogue	1	0.8	1.9
Florists, nurserymen and seedsmen	0	0.0	2.2
Toys, hobby, cycle and sports	0	0.0	5.2
Jewellers	12	9.4	5.0
Charity and second-hand shops	4	3.1	9.7
Other comparison good retailers	25	19.5	4.5
Total	128	100.0	100.0

Source: Tooting Town Centre Survey 2018 and Experian Goad Plan national averages.

Clothing and footwear; electrical, music and photography; jewellers; and other comparison goods retailers are all above the national average with electricals and other comparison goods retailers being significantly so. On the other hand, furniture, carpets and textiles; books, arts, cards and stationers; DIY, hardware and homeware; china, glass and gifts; chemists, drug stores and opticians; variety and department stores; and charity shops are all below the national average.

The number of multiple comparison retailers is limited and reflects Tooting's size and role. The multiple comparison retailers include:

Table T4 – Tooting's comparison multiples

TK Maxx	Superdrug	O2	Footlocker
Vodafone	Holland and Barrett	Wilko	Snappy Snaps
Savers	Boots Opticians	Oxford	J D Sports

Source: Tooting Town Centre Survey 2018

Tooting has an excellent range of service uses (197 units), as shown in Table T4. The representation of categories is similar to the national average. However, there are higher proportions of restaurants and cafés; banks; and betting shops compared to the national average, while there is a smaller proportion of fast food and takeaways; estate agents; hairdressers and laundrettes than the national average.

Table T4 - Mix of service uses – Tooting

Type	Number units	% units	UK Average
Restaurants/café	54	28.9	24.1
Fast food/takeaways	27	14.4	14.7
Pubs/bars	19	10.2	11.5
Banks/other financial services	25	13.4	9.5
Betting shops/casinos/amusement	8	4.3	3.4
Estate agents/valuers	12	6.4	8.7
Travel agents	4	2.1	2.0
Hairdressers/beauty parlours	35	18.7	24.3
Launderettes/dry cleaners	3	1.6	1.8
Sub-total	187	100.0	100.0
Other	10		
Total	197		

Source: Tooting Town Centre Survey 2018 and Experian Goad Plan national averages.

Operator requirements

The Requirement List is a published source of information providing known requirements for retail, food/beverage, hotel and leisure operators' space in towns across the country. For Tooting there are 25 listed known retail and leisure operators' requirements, the lowest for the five main centres. The list of requirements is shown in Appendix 4. The requirements relating to Tooting include 13 Class A1 retail and service uses, 10 Class A3/A4/A5 food/beverage uses and 2 D1/D2 leisure/ community uses.

Commercial rents

According to the VOA, Zone A retail rents vary throughout the centre. Along the High Street and Mitcham Road they vary from £275 per sq.m to £1,050 per sq.m. Zone A rents range from £850 - £1,050 per sq.m in the prime pitch. Zone A rents reduced slightly from £1,070 to £1,050 per sq.m change between 2010 and 2017. Along Trinity Road Zone A retail rents are lower at £200-380 per sq.m.

Catchment area

Tooting's local catchment area includes Tooting and Graveney wards. These wards have high levels of relative deprivation as indicated in the Wandsworth Local Plan Core Strategy with Relative Deprivation Assessment scores of over 11. The local catchment is the least affluent in the Borough.

The household survey results indicate 36% of respondents across the study area had used shops and services in Tooting, which is higher than Balham and Putney, but lower than Wandsworth Town and Clapham Junction. Over 91% living in the local area (Zone 4) had visited the centre. Only 4.1% of respondents indicated they do most of their non-food shopping in Tooting, which was lower than Wandsworth Town and Clapham Junction. The retail capacity analysis suggests Tooting attracts 53% of its trade from Zone 4. The centre has a reasonably wide catchment area when compared with Balham.

Expenditure leakage from Zone 4 is 48% for convenience goods; 81% for comparison goods and 58% for food/beverage expenditure, which are similar to most other zones in the Borough.

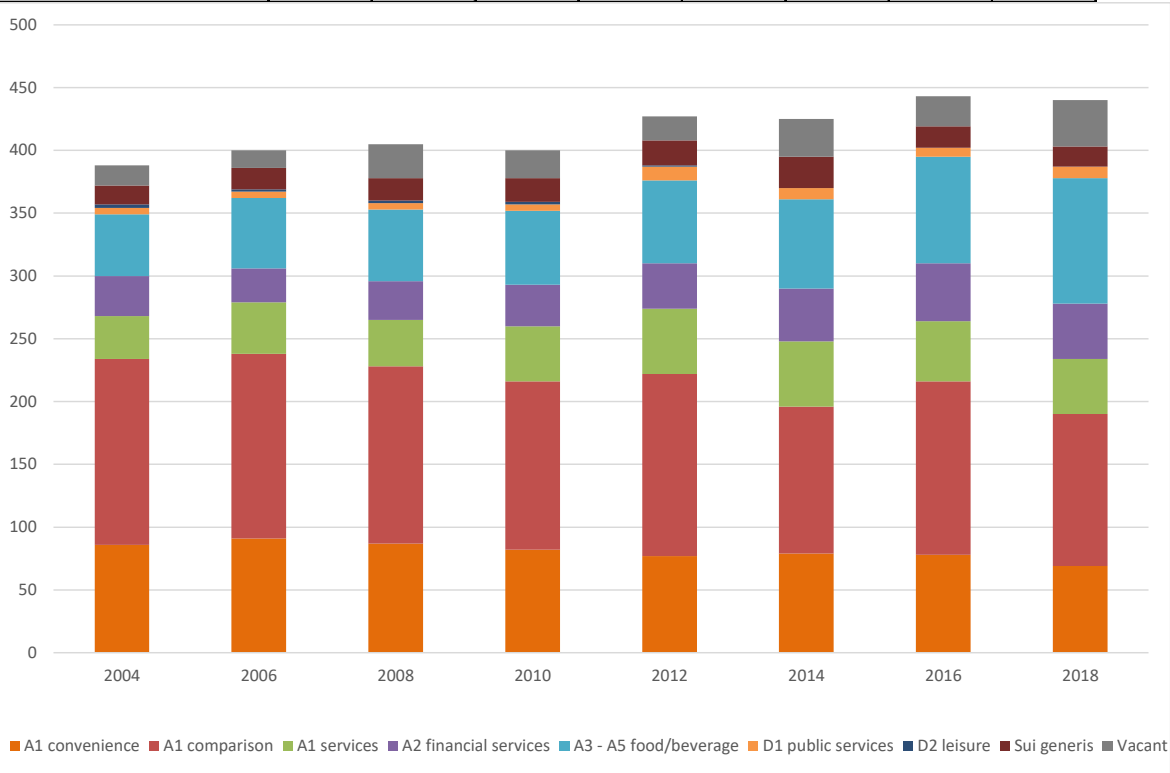
Past trends

The change in the mix of retail and leisure uses within Tooting is shown below (source: Wandsworth Council Town Centre Surveys). The total number of retail and leisure uses has increase since 2004, by +13.4%

between 2004 and 2018. However, the number of vacant units has risen sharply since 2012. This increase may be due in part to an increase in the area covered by the Council’s land use survey. Despite the increase in units the number of convenience (-17 units) and comparison (-27) goods shops has fallen. These reductions have been partially offset by the increase in A1 services (+10), A2 financial services (+12) and A3-A5 food/beverage outlets (+51). The number of evening economy uses including restaurants/bars has increased steadily since 2004, with a sharp increase since 2014.

Tooting Town Centre - retail, service and leisure units by Use Class

	2004	2006	2008	2010	2012	2014	2016	2018
A1 convenience	86	91	87	82	77	79	78	69
A1 comparison	148	147	141	134	145	117	138	121
A1 services	34	41	37	44	52	52	48	44
A2 financial services	32	27	31	33	36	42	46	44
A3 - A5 food/beverage	49	56	57	59	66	71	85	100
D1 public services	5	5	5	5	11	9	7	9
D2 leisure	3	2	2	2	1	0	0	0
Sui generis	15	17	18	19	20	25	17	16
Vacant	16	14	27	22	19	30	24	37
Total	388	400	405	400	427	425	443	440



Source: Wandsworth Council Land Use Surveys

New London Plan indicators

The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Tooting’s designations are:

- Network classification: Major centre
- Night-time classification: NT3 (local significance)

- Commercial growth potential: Medium (moderate levels of retail, leisure or office demand)
- Residential growth potential: High
- Office guidelines: C (protect small office capacity).
- Strategic area for regeneration: Yes

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Tooting in the last year. Of those who had used shops/services in Tooting, respondents were asked what they like and dislike about the town centre. Similar to the four other town centres, 33% like Tooting because of its proximity to where they live. The main factors mentioned (5% of respondents or more) were:

factors liked: good choice of shops in general (13%); good range of shops (12%); good market (12%); easy to walk/cycle to (8%); good supermarkets (7%); good restaurants (6%); good bus services (6%); diverse/multi-cultural (5%); low prices/value for money (5%); friendly atmosphere (5%).

factors disliked: traffic congestion (10%); poor car parking (9%); poor cleanliness/ maintenance (8%); poor choice of shops in general (8%); poor shopping environment (5%).

The results suggest there are mixed views regarding the choice of shops. Tooting rates least favourably in terms of cleanliness/maintenance when compared with the other town centres.

Stakeholder feedback

A selection of stakeholders were asked about their views on town centres in the Borough. Five proformas were returned relating to Tooting. Four of these stakeholders described Tooting's current trading performance as "relatively strong" or "satisfactory" and "steady". Only one described performance as "very poor" and "declining".

The key strengths and weakness suggested were:

- *Strengths:* busy centre; proximity to St. George's Hospital; transport links; diverse local population profile; the two markets; the library; independent businesses;
- *Weaknesses:* poor cleanliness/litter/graffiti; bad reputation; some downmarket outlets and poor shopfronts; lack of a clear brand /or theme; lack of office/workshops; lack of free car parking/cycle parking and the failure to introduce a Business improvement District (BID).

Accessibility

The household survey results suggest Tooting attracts customers by a variety of means of transport. Mode of travel for food shopping with the local area (Zone 4) is similar to the study area average with the highest proportions doing their main food shopping by car (56%) or walking (36%). For non-food shopping, Tooting attracts a good mix of car, bus and walking customers, which suggests high levels of accessibility. The survey results also indicated higher levels of dissatisfaction with car parking provision than satisfaction i.e. 9% compared with 2%. However, more respondents mentioned bus services as a positive rather than a negative factor (6% compared with less than 1%).

Tooting has good public transport accessibility. Tooting Broadway underground station is located on the Tooting High Street and Mitcham Lane junction. The underground ticket hall building is grade II listed and is located centrally within the town centre. The station is on London Underground's Northern Line with regular direct services to Central London, Kings Cross St. Pancras and North London. Tooting railway station is located outside of the town centre to the south along Mitcham Road and is within the London Borough of Merton. Tooting town centre is also served by a number of bus routes including G1, 264, 131, 57 and 493

Tooting's main accessible car park serving the centre is the Sainsbury's car park with 198 spaces located behind Tooting Broadway Station. Parking here is free for customers who spend £10 or more in store and the maximum stay is 2 hours. For non-customers, there is a flat rate charge of £5. There is also parking available at St George's Hospital, a few streets from Tooting High Street where there are 290 spaces and parking costs £2.50 an hour. In terms of on-street parking, there are a number of spaces on the side streets off the main shopping roads in Tooting, all of which are within controlled zones where pay and display is required and various restrictions apply. Some of these zones are shared permit/pay and display parking areas, but along Mitcham Road and Totterdown Street (off Tooting High Street) there are a number of shopper only zones with a maximum stay of 1 hour. The charges for pay and display on-street parking are £3.40 per hour.

Environment quality

The main primary shopping area in Tooting town centre is located along Tooting High Street. The secondary shopping area is located along Mitcham Road.

The quality of buildings within Tooting town centre is predominantly good. The architectural continuity of many of the buildings at upper floors is an attractive feature of the centre and enhances the visual amenity of the town. The Underground entrance building is striking and similarly to Balham, typical of other station buildings along this section of the Northern Line, reinforcing a sense of place. There are several modern buildings which vary in visual quality. The Sainsbury's and South Thames College building add significantly to the environmental quality of the centre, whilst small areas of post war single storey development break up the Victorian and Edwardian context of the centre. The Gala Bingo on Mitcham Road (formerly the Granada Tooting Cinema) is a Grade I listed building. Generally, the façades are well maintained and the shopfronts do not detract from the quality of the built environment, however there are a number of shopfronts which look tired.

There was some evidence of graffiti and fly posting within the centre, however, overall during the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging. The centre does not have any areas of green space, but along Tooting High Street there are a number of benches and bins, though despite some small trees along Mitcham Road, the centre lacks any real greenery or planting. Whilst the area was not generally run down, there were signs of wear on the street furniture.

The pavements are in reasonable condition although there were signs of light litter. They are slightly narrow which creates a cluttered feel, exacerbated by the provision of railings to the road. The centre would benefit from enhanced landscaping features to enhance its attractiveness.

Reported crime

Recorded crime within the Tooting Metropolitan Police neighbourhood was 1,625 crimes during 2019, the lowest in the five town centres in the Borough. Violence and sexual offences represented 27% of total crimes, followed by anti-social behaviour 22% and other types of theft at 12%.

Summary of Tooting Town Centre Strengths and Weaknesses

Strengths

- Three supermarkets and a variety of smaller convenience shops, including ethnic specialist. Food and grocery provision is suitable for both main and top up food shopping.
- A healthy mix of retailers with a good range of specialist independent comparison retailers, including ethnic specialists.
- Two popular and varied indoor markets.
- A good range of service facilities including banks and building societies.
- A good range of restaurants, cafés and takeaways, although the New London Plan classifies the night-time activity only as NT3 (local significance).
- The vacancy rate is lower than the UK average and comparable with the GLA London average, which suggests demand for premises is reasonably strong.
- The New London Plan suggests high potential for residential growth.
- Proximity to St. George's Hospital help generate additional trade.
- Lowest recorded crime of the five town centres in the Borough.

Weaknesses

- Traffic congestion and poor air quality, particularly around the Tooting High Street and Mitcham Lane junction.
- Local catchment is the least affluent in the Borough.
- A relatively limited range of national multiple retailers.
- Linear structure creates low pedestrian flows in peripheral areas.

Wandsworth Town Centre

Wandsworth Town is located in the north of the Borough and is identified as a ‘Major Centre’ in The London Plan. The town centre is primarily based along Wandsworth High Street and Garratt Lane. The Southside Shopping Centre has links to both the High Street and Garratt Lane. The town centre is bounded by King George’s Park to the south and west, housing to the east and the former Young’s Brewery to the north.

The Southside Shopping Centre originally opened in 1971 but has been substantially transformed over the last decade. The Ram Brewery has now been redeveloped providing residential and commercial space. There are a number of new food/beverage units available. The key roles of Wandsworth Town Centre include:

- convenience shopping: two large food stores operated by Sainsbury’s and Waitrose, supported by a baker, grocer, health food shop and several newsagents. There are also several convenience stores including a Tesco Express and independent stores.;
- comparison shopping: a good range of multiple retailers selling a range of higher and lower order comparison goods;
- services: provides a reasonable range of high street national banks/building societies, cafés, restaurants, takeaways, travel agents and hairdressers/beauty parlours;
- entertainment and evening economy: several pubs, a cinema and three betting shops; and
- community facilities: two places of worship, Council Offices, two health clubs, a doctors’ surgery and dental surgeries.

Mix of uses and occupier representation

Wandsworth Town has a total of 148 retail, service and leisure uses (source: Wandsworth Town Centre Survey 2018) in all frontages. This figure includes 142 Class A1-A5 units. The diversity of Class A1-A5 units within Wandsworth Town is set out in Table W1, compared with the Goad Plan national average and the GLA Town Centre Data 2017 average for London. This table excludes the recently completed Ram Quarter development, which currently provides the Backyard Cinema, Sambrook Brewery, nursery and 30 available units for retail, food/beverage uses.

Table W1 - Mix of Uses (Class A1 – A5) – Wandsworth Town

Type	Number units	% units	GLA London average	UK average
A1 convenience	13	9.2	12.8	9.2
A1 comparison	58	40.9	37.7	32.0
A1 services	13	9.2	14.7	14.2
A2 financial services	10	7.0		11.4
A3 restaurants/cafés	18	12.7	14.9	9.9
A4 pubs/bars	2	1.4	3.8	4.8
A5 takeaways	13	9.2	7.4	6.1
Vacant	15	10.6	8.6	12.4
Total	142	100.0	100.0	100.0

Source: Wandsworth Town Centre Survey 2018, GLA 2017 London Town Centre Data and Experian Goad Plan national averages.

Wandsworth town centre has a higher than the national average proportion of comparison retailers. There were 15 vacant retail units within Wandsworth at the time of the Council’s survey, equating to a vacancy rate of 10.6%, which is higher than the London average but lower than the average for the UK.

Wandsworth Town has a reasonable selection of comparison shops (58 units). There are four categories which are not represented in this centre, i.e. furniture, carpets and textiles; china, glass and gifts; cars,

motorcycles and accessories; and florists, nurserymen and seedsmen. Table W2 provides a breakdown of comparison shop units by category.

Table W2 - Mix of comparison goods uses – Wandsworth Town

Type	Number units	% units	UK Average
Clothing and footwear	19	32.8	22.9
Furniture, carpets and textiles	0	0.0	7.5
Books, arts, cards and stationers	5	8.6	7.6
Electrical, music and photography	8	13.8	9.4
DIY, hardware and homeware	2	3.4	6.4
China, glass and gifts	0	0.0	5.2
Cars, motorcycles and accessories	0	0.0	1.2
Chemists, drug stores and opticians	9	15.5	11.3
Variety, department and catalogue	2	3.4	1.9
Florists, nurserymen and seedsmen	0	0.0	2.2
Toys, hobby, cycle and sports	6	10.3	5.2
Jewellers	2	3.4	5.0
Charity and second-hand shops	4	6.9	9.7
Other comparison good retailers	1	1.7	4.5
Total	58	100.0	100.0

Source: Wandsworth Town Centre Survey 2018 and Experian Goad Plan national averages.

There is a significantly higher proportion of clothing and footwear; books, arts, cards and stationers; electricals, music and photography; chemists, drug stores and opticians; variety, department and catalogue stores; and toys, hobby, cycle and sports. There is a lower than national average proportion of DIY, hardware and homewares; jewellers; charity and second hand shops; and other comparison goods retailers. The number of multiple comparison retailers is reasonable and reflects Wandsworth's size and role. The multiple comparison retailers include:

Table W5 – Wandsworth Town's comparison multiples

Kiko	Boots Opticians	H&M	Foot Locker
Topshop	Holland and Barrett	Decathlon	Office
Paperchase	Superdrug	J D Sports	Uniqlo

Source: Wandsworth Town Centre Survey 2018

Wandsworth town centre has a reasonable range of service uses (56 units), as shown in Table W4. The representations of categories is similar to the national average. However, there is a significantly larger proportion of restaurants and cafés; fast food takeaways; banks; betting shops and laundrettes. The proportions of pubs and bars; estate agents; and travel agents are all lower than the national average.

Table W4 - Mix of service uses – Wandsworth Town

Type	Number units	% units	UK Average
Restaurants/cafés	18	34.0	24.1
Fast food/takeaways	13	24.5	14.7
Pubs/bars	2	3.8	11.5
Banks/other financial services	6	11.3	9.5
Betting shops/casinos/amusement	3	5.7	3.4
Estate agents/valuers	1	1.9	8.7
Travel agents	1	1.9	2.0
Hairdressers/beauty parlours	8	15.1	24.3
Launderettes/dry cleaners	1	1.9	1.8
Sub-total	53	100.0	100.0
Other	3		
Total	56		

Source: Wandsworth Town Centre Survey 2018 and Experian Goad Plan national averages.

Operator requirements

The Requirement List is a published source of information providing known requirements for retail, food/beverage, hotel and leisure operators' space in towns across the country. For Wandsworth, there are 43 listed known retail and leisure operators' requirements, slightly above the average (40) for the five main centres. The list of requirements for all five town centres is shown in Appendix 4. The requirements relating to Wandsworth include 20 Class A1 retail and service uses, 10 Class A3/A4/A5 food/beverage uses and 11 D1/D2 leisure/ community uses.

Commercial rents

According to the VOA, Zone A retail rents vary throughout the centre. With the Southside Shopping Centre Zone A rents are predominantly £800 - £1,000 per sq.m which is the prime pitch. Prime Zone A rents reduced from £1,100 to £1,000 per sq.m between 2010 and 2017. The centre has the second lowest prime pitch rental levels of the five centres in the Borough. In Garratt Lane and the High Street Zone A retail rents are lower at £300-360 per sq.m. and £250-£325 per sq.m, respectively.

Catchment area

Wandsworth Town's local catchment area includes Fairfield ward and parts of Thamesfield, East Putney, Southfields and Wandsworth Common Wards. These wards generally have low levels of relative deprivation as indicated in the Wandsworth Local Plan Core Strategy with a Relative Deprivation Assessment score of 11 or lower. The local catchment is relatively affluent.

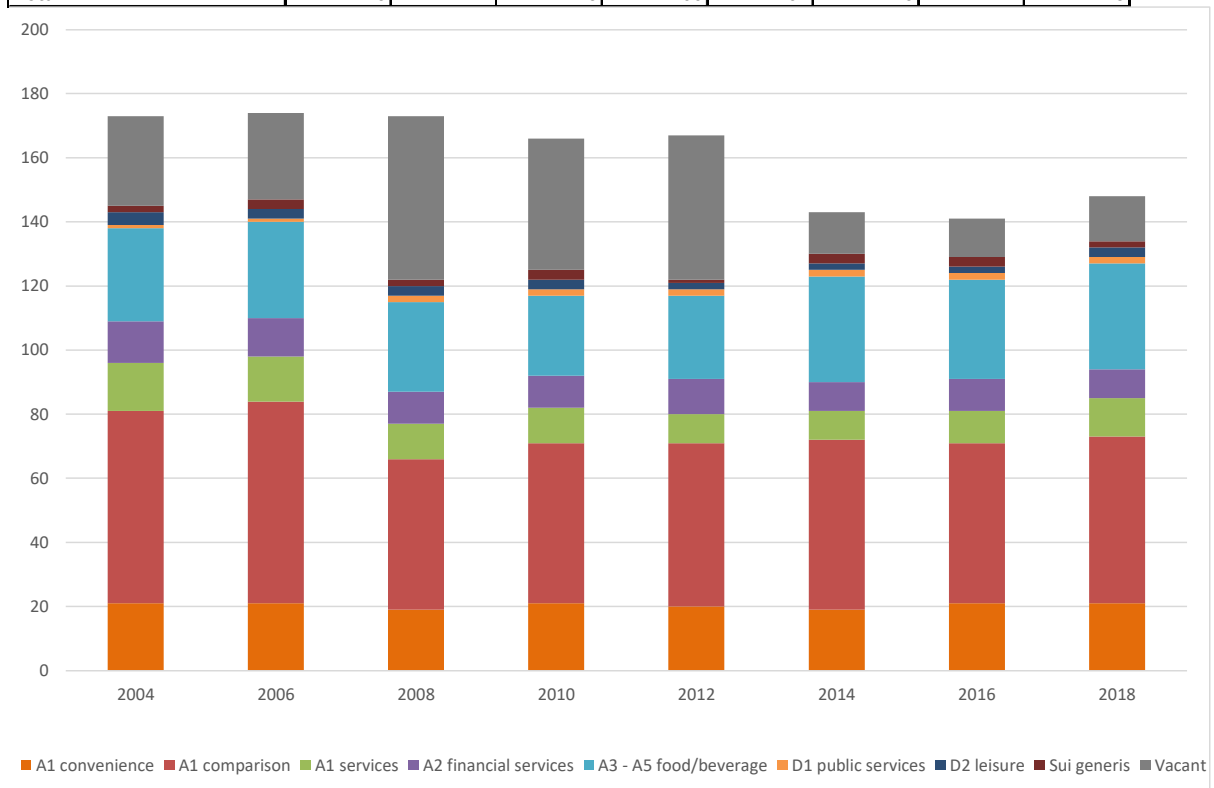
The household survey results indicate 57% of respondents across the study area had used shops and services in Wandsworth Town in the last year, which is the second highest percentage for the five main town centres in the Borough. Nearly 90% living in the local area (Zone 1) had visited the centre. Over 13% of respondents indicated they do most of their non-food shopping in Wandsworth Town, which was the highest for the five main town centres. The retail capacity analysis suggests Wandsworth Town attracts around half its trade (54%) from Zone 1. The centre has a relatively wide catchment area when compared with other town centres in the Borough. Expenditure leakage from Zone 1 is 41% for convenience goods; 64% for comparison goods and 54% for food/beverage expenditure, which are relatively high retention rates when compared with other zones in the Borough.

Past trends

The change in the mix of retail and leisure uses within Wandsworth Town is shown below (source: Wandsworth Council Town Centre Surveys). The total number of retail and leisure uses has fallen, with a sharp fall after 2012. This decrease may be due to redevelopment and reconfiguration of the Southside Shopping Centre. The figures do not include the new Ram Quarter development. The number of vacant units has fallen sharply since 2012, again due to development at the Southside Shopping Centre. The number of vacant units was particularly high between 2008 and 2012 due to redevelopment. The key change over the period was the decrease in the number of comparison goods shops (-12). The number of evening economy uses including restaurants/bars increased between 2012 and 2016 due to development at Southside.

Wandsworth Town Centre - retail, service and leisure units by Use Class

	2004	2006	2008	2010	2012	2014	2016	2018
A1 convenience	21	21	19	21	20	19	21	21
A1 comparison	60	63	47	50	51	53	50	52
A1 services	15	14	11	11	9	9	10	12
A2 financial services	13	12	10	10	11	9	10	9
A3 - A5 food/beverage	29	30	28	25	26	33	31	33
D1 public services	1	1	2	2	2	2	2	2
D2 leisure	4	3	3	3	2	2	2	3
Sui generis	2	3	2	3	1	3	3	2
Vacant	28	27	51	41	45	13	12	14
Total	173	174	173	166	167	143	141	148



Source: Wandsworth Council Land Use Surveys

New London Plan indicators

The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Wandsworth's designations are:

- Network classification: Major centre
- Night-time classification: NT3 (local significance)
- Commercial growth potential: Medium (moderate levels of retail, leisure or office demand)
- Residential growth potential: High
- Office guidelines: C (protect small office capacity)
- Strategic area for regeneration: No

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Wandsworth Town in the last year. Of those who had used shops/services in Wandsworth Town, respondents were asked what they like and dislike about the town centre. Similar to the four other town centres, 30% like Wandsworth Town because of its proximity to where they live. The main factors mentioned (5% of respondents or more) were:

factors liked: good choice of shops in general (27%); good range of shops (17%); good car parking (12%); good bus services (10%); good choice of clothing shops (8%); good supermarkets (8%); nice environment (7%); easy to get to by car (7%); layout/easy to get around (7%); easy to walk/cycle to (6%); friendly atmosphere (5%) and good quality shops (5%).

factors disliked: traffic congestion (14%); poor choice of shops in general (8%); too many empty shops (6%); poor choice of independent shops (6%);

Wandsworth Town recorded the most factors (12) liked and least factors (4) disliked by 5% or more of respondents, suggesting the highest level of customer satisfaction of the five centres.

Wandsworth Town rates less favourably in terms of traffic congestion when compared with the other town centres apart from Putney.

Stakeholder feedback

A selection of stakeholders were asked about their views on town centres in the Borough. Three proformas were returned relating to Wandsworth Town. All stakeholders described Wandsworth's current trading performance as "satisfactory" or "relatively strong" and performance was "steady" or "growing". The key strengths and weakness suggested were:

Strengths: transport links; sense of community; access to Central London; good mix of shops/services; recent residential developments; active BID and business support; improving evening economy;

Weaknesses: road works/traffic congestion but one-way system proposed changes should help; not enough shops/diversity; poor off peak trade; demand for retail space low; needs more diversification; better nightlife/leisure facilities and experiential retailing including late night opening; poor air quality; shoplifting and need for more policing.

Accessibility

The household survey results suggest Wandsworth Town attracts customers by a variety of means of transport. Mode of travel for food shopping with the local area (Zone 1) is similar to the study area average with the highest proportions doing their main food shopping by car (46%) or walking (35%). For non-food shopping, Wandsworth attracts a good mix of car, bus and walking customers, which suggests high levels of accessibility. The survey results also indicated higher levels of satisfaction with car parking provision than dissatisfaction i.e. 12% compared with 4%. Wandsworth was the most highly rated in terms of good car parking in the Borough's main centres. More respondents mentioned bus services as a positive rather than a negative factor (10% compared with 3%).

Wandsworth town centre has reasonable public transport accessibility. There is a railway station to the north east of the centre just outside the town centre boundary which provides good access into Central London. The centre does not have a tube line but is well served by bus routes, providing good access to other centres within the Borough and other parts of London. Bus routes which serve the centre include no's 28, 37, 39, 44, 87, 156, 170, 220, 270, 337 and 485. The centre is also served by several night bus routes including N28, N44 and N87.

Wandsworth town centre has three main car parks; the Sainsbury's car park to the east of Garratt lane has approximately 400 spaces and the Southside Shopping Centre has two separate car parks with a total of 1,300 spaces between the two of them. The car park has direct links to the Waitrose Supermarket and into the shopping centre. There is also some on-street parking available which are within controlled zones where pay and display is required and various restrictions apply. Most parking here is for a max stay of 2 hours and cost £3.40 an hour.

Environment quality

The main primary shopping area is located within the Southside Shopping Centre and the secondary shopping area is located along Wandsworth High Street and Garratt Lane. The Southside Shopping Centre provides a covered pedestrian friendly shopping environment.

Wandsworth Town was developed along an important coaching route from the City of London to Southampton and Portsmouth. The oldest building is the All Saints church and its tower dates back to 1630. Wandsworth Town is situated to the north of the Borough, just south of the River Thames. The Southside Shopping Centre (formerly the Arndale shopping centre) originally opened in 1971. Between 2000 and 2003 it underwent extensive redevelopment and was opened in 2004 as the renamed Southside Shopping Centre.

Elsewhere there are more period style buildings particularly on Wandsworth High Street. Some of the buildings date back to that late 1600's and the Young's Brewery (which is now closed) opened in the early 1800's. Several of the buildings could benefit from improvements to their façade including upper parts and some of the shops along Wandsworth High Street could improve their fascia. Some of the buildings on the periphery of the centre are looking quite tired and dated and would benefit from refurbishment.

There was some evidence of graffiti or vandalism within the centre, but this was not significant. Overall during the day-time the centre felt relatively safe. There was no evidence of anti-social behaviour or begging. The area does not have many open spaces, apart from a paved area to the rear of the college buildings and to the north of Sainsbury's where there is a semicircle of seating.

Reported crime

Recorded crime within the Wandsworth Town Metropolitan Police neighbourhood was 1,532 crimes during 2019, the second lowest of the five town centres in the Borough. Anti-social behaviour represented 18.6% of total crime, followed by violence/sexual offences at 18% and vehicle crime at 14%.

Summary of Wandsworth Town Centre Strengths and Weaknesses

Strengths

- The local catchment is relatively affluent.
- Two large food stores supermarkets suitable for main and bulk food shopping.
- A good selection of comparison shops, with a range of multiple retailers including Primark, H&M and Argos, although the Debenhams store has recently closed.
- A high proportion of banks/other financial services.
- An improving night-time economy, although the New London Plan classifies the night-time activity only as NT3 (local significance).

- Southside Shopping Centre provides a covered pedestrian friendly shopping environment.
- The New London Plan suggests high potential for residential growth.

Weaknesses

- Vacancy rate is currently higher than the GLA London average, but lower than the UK average.
- The second lowest prime pitch Zone A retail rents of the five main town centres in the Borough and rents decreased between 2010 to 2017.
- Traffic congestion and poor air quality, particularly around the High Street and Garratts Lane junction, but new one-way system proposal should help to address this.
- The New London Plan suggests only potential to protect rather than grow office capacity.

Local centres and Important Local Parades

The existing provision of local shopping destinations within the Borough (Local Centres and Important Local Parades) offers a balanced distribution of local facilities serving local communities. These facilities complement the five main Town Centres and have an important role in serving the day-to-day needs in their local areas.

In addition to the audit of the five main Town Centres, a local needs index for the Local Centres and Important Local Parades within the Borough has been undertaken. The local shopping destinations vary in size, from only 3 commercial units to as large as 88 commercial units.

The key focus in auditing local destinations has been in assessing the "needs" of local residents and to what extent each is meeting these "needs". There is no clear definition of need, but it is considered that residents could expect to find some, or all of the following shops, services and community uses within easy walking distance of their home:

- food or convenience store suitable for top-up shopping;
- bank;
- post office;
- newsagent;
- off licence;
- chemist;
- takeaway, café or restaurant;
- public house;
- bookmakers;
- laundrette/dry cleaners;
- hairdressers/beauty salon;
- florist;
- estate agents;
- community hall;
- doctor's surgery; and
- library.

Each local destination has been allocated a score out of 16, based on the number of categories of shops and services listed above (one point per category represented) that are available in the centre. The local needs index is set out overleaf. It is considered that the local needs index provides a useful indicator of whether a local centre or important local parade is meeting some or all the needs of local residents. The local needs index is not a precise measure of whether a local shopping centre is meeting the needs of local residents, as there are many other factors to consider:

- the relative size a local centre/parade will dictate the range of shops and services offered;
- the close proximity of other town centres, local centres and 'standalone' shops means that local need may be met at an alternative location within walking distance and local needs are therefore still being met;
- the quality of the shopping centre or parade, in terms of its environment, type and range of retailers will affect how it is perceived and used by local residents; and

- the relative accessibility of each centre will be an important factor in how local people use the shops and services e.g. a major traffic route, which is difficult for pedestrians to cross, may influence shopping patterns in the area.

Local Needs Summary

Destination name	Status	Total Units	Local Needs Index	No. of conv stores	No. of vacant units
Balham	Town	194	13	17	24
Clapham Junction	Town	306	13	30	17
Putney	Town	293	13	27	38
Tooting	Town	425	12	62	38
Wandsworth	Town	142	13	13	15
Battersea Park Road	Local	61	12	7	3
Bellevue Road	Local	41	10	3	4
Clapham South*	Local	33	12	6	4
Earlsfield*	Local	88	11	9	6
Lavender Hill/ Queenstown Road*	Local	69	7	2	20
Mitcham Lane*	Local	56	11	8	13
Roehampton	Local	45	7	9	5
Southfields	Local	66	9	13	5
Tooting Bec	Local	52	9	5	8
Battersea Bridge Road (ILP 1)	Parade	6	3	2	1
Battersea High Street (ILP 2)	Parade	19	4	2	2
Battersea Park Road (ILP 3)	Parade	14	7	2	5
Beaumont Road (ILP 4)	Parade	Under Construction			
Blandfield Road (ILP 5)	Parade	15	4	2	3
East Hill (ILP 6)	Parade	10	5	1	2
Franciscan Road (ILP 7)	Parade	6	4	2	0
Garratt Lane (ILP 8)	Parade	25	6	1	4
Garratt Lane (ILP 9)	Parade	17	7	2	0
Inner Park Road (ILP 10)	Parade	7	5	3	2
Lower Richmond Road (ILP 11)	Parade	20	5	1	2
Merton Road (ILP 12)	Parade	15	5	2	1
Montfort Place (ILP 13)	Parade	4	3	2	0
Moyser Road (ILP 14)	Parade	16	8	4	1
Northcote Road (ILP 15)	Parade	12	5	1	2
Petersfield Rise (ILP 16)	Parade	3	1	2	0
Portswood Place (ILP 17)	Parade	4	3	2	0
Rockingham Close (ILP 18)	Parade	3	2	2	0
St Johns Hill (ILP 19)	Parade	16	6	2	0
Tildesley Road (ILP 20)	Parade	20	7	1	5
Trinity Road (ILP 21)	Parade	5	3	1	1
Upper Richmond Road (ILP 22)	Parade	12	6	1	1
Upper Richmond Road (ILP 23)*	Parade	21	7	2	0

Source: Wandsworth Council Survey 2018 * centres extending into neighbouring borough. Figures for LB Wandsworth part only.

There is a wide range of scores across the centres. These scores are based on the representation of key retail/service provision within the centre. The town centres and larger local centres have the highest scores (10 or more on the local needs index). In addition to this it is important to consider the ability of these centres in meeting top-up shopping needs. Therefore, the number of convenience stores with the ability to provide local top-up shopping (e.g. a grocer, local corner shop or small supermarket) in the parade is also considered.

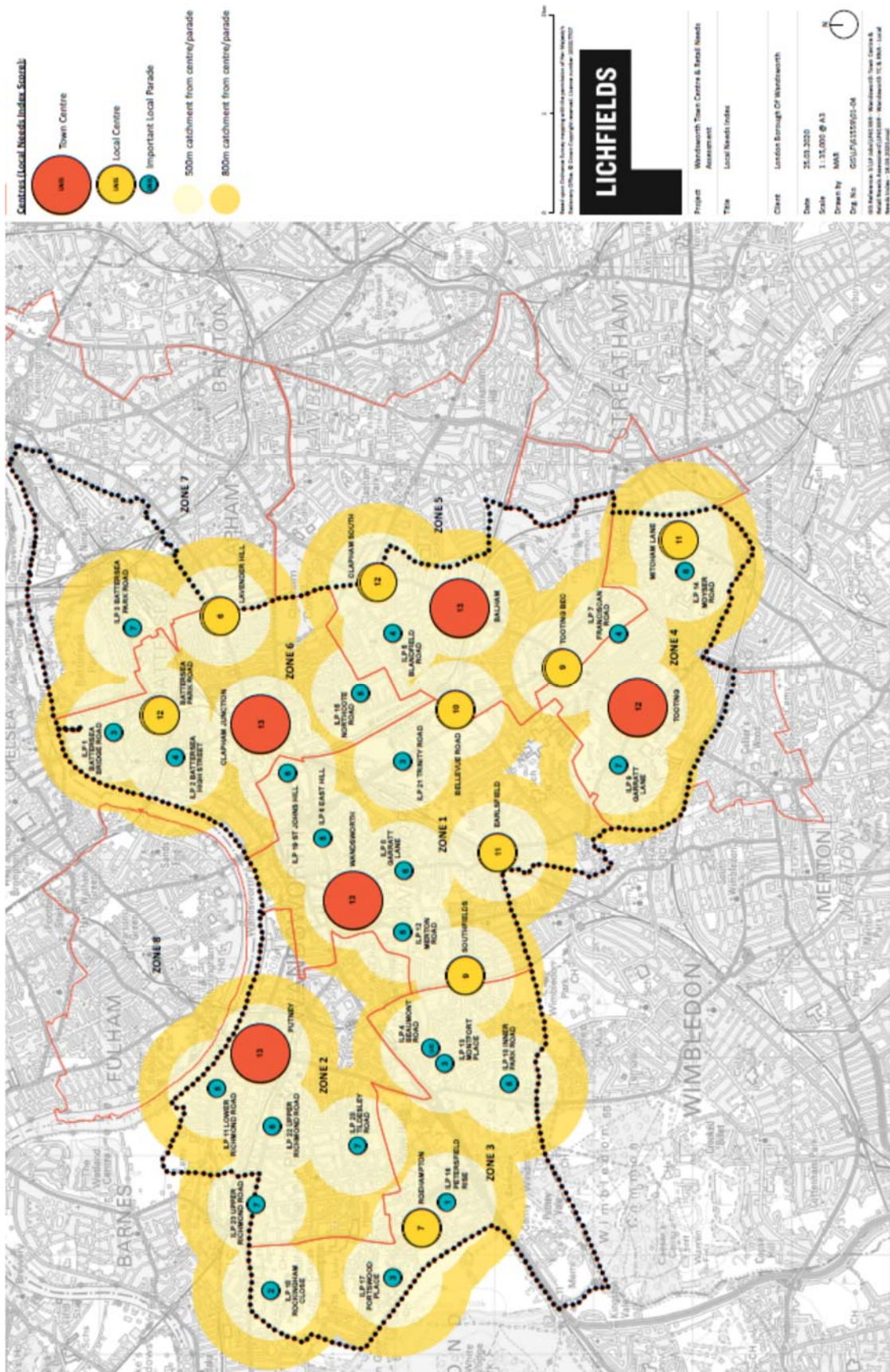
The majority of Local Centres and Important Local Parades are meeting most local needs. The local needs index suggests 17 of the 31 Local Centres and Important Local Parades are meeting at least six of the identified local needs (excluding Beaumont Road – ILP 4 under constructions at the time of the survey).

All Local Centres provide 7 or more of the essential local shops and services. Battersea Park Road and Clapham South have high Local Needs Index of 12, suggesting that local residents of the area are well served by their local centre. By contrast, Important Local Parades at Battersea Bridge (ILP 1), Montfort Place (ILP 13), Petersfield Rise (ILP 16), Portswood Place (ILP 17), and Rockingham Close (IPL18) and Trinity Road (ILP 21) are small centres (6 units or less) and have limited facilities with a Local Needs Index of 3 or less. Most of these under-performing parades are in the west of the Borough and may be under threat if shop/service closures occur in the future. This reinforces the needs to maintain and enhance the role of Roehampton Local Centre (including the implementation of the Alton Estate regeneration) in the west of the Borough. Elsewhere in Zone 3, any emerging mixed use developments that include an element of local shops and services could be encouraged in areas that are currently poorly served, subject to compliance with the sequential and impact tests.

The Town, Local Centres and Important Local Parades and their respective scores are plotted on a plan overleaf. A 500 metres and 800 metres radius from each centre is also shown, which represents what should be considered to be a reasonable and maximum walking distance.

This plan demonstrates the vast majority of households within the Borough have at least one designated centre or parade within easy walking distance (500 – 800 metres). As indicated above, the west of the Borough is the most obvious area of deficiency with several small parades.

This network should continue to be protected to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.



Appendix 4 Operator requirements

Class A1 operator space requirements (The Requirement List - February 2020)

Operator	Use	Size Sq.Ft	Balham	Clapham/ Battersea	Putney	Tooting	Wandsworth Town
Balfe's Bikes	A1 bicycles	1,500 - 2,500			*		
Age UK	A1 charity	1,000 - 7,000	*				
British Heart Foundation	A1 charity	5,000 - 8,000			*	*	
Crisis	A1 charity	1,500 - 3,000			*	*	
Oxfam	A1 charity	700 - 2,000					*
Shelter	A1 charity	800					*
Traid	A1 charity - clothing	2,000 - 3,000	*		*	*	
Whistles	A1 clothing	800 - 1,500			*		
Over Under Coffee	A1 coffee	350 - 800			*		*
Soho Coffee Co	A1 coffee	500 - 2,000			*		
Starbucks	A1 coffee	1,500 - 3,000					*
Wayne's Coffee	A1 coffee	600 - 1,750			*		
Artisan du Chocolat	A1 confectionary	600		*			
OneBelow	A1 discount	2,500 - 7,000	*		*	*	*
Sam 99p	A1 discount	3,000 - 6,000	*				
Al Murad Tiles	A1 DIY	3,000 - 8,000		*			
Leyland SDM	A1 DIY	3,000	*			*	*
Banjo's Bakery	A1 food	2,000 - 3,000				*	*
Bayley & Sage	A1 food	500 - 3,000		*			
Cook	A1 food	1,000			*		
Co-op	A1 food	2,000 - 10,000					*
Doughnut Time	A1 food	350-700		*			
Gails Bakery	A1 food	1,200 - 2,000			*		*
Holland & Barrett	A1 food	900 - 7,000				*	
Little Dessert Shop	A1 food	1,500 - 2,500				*	
Revital Health Foods	A1 food	800 -1,100					*
Taj The Grocer	A1 food	2,500 - 4,000	*	*	*	*	
Lidl	A1 food store	10,000 - 30,000	*	*	*	*	*
Beaumont Beds	A1 furniture/interiors	1,850 - 4,000					*
One World	A1 furniture/interiors	2,500 - 5,000	*	*			*
Sofa Workshop	A1 furniture/interiors	2,500 - 5,000			*		
Sofas & Stuff	A1 furniture/interiors	3,000 - 8,000		*			
Sostrene Grene	A1 furniture/interiors	3,500					*
Savers	A1 health/beauty	1,500 - 3,000				*	
Superdrug	A1 health/beauty	2,000 - 7,500	*				
Wilko	A1 homewares	3,000 - 20,000	*				*
Warren James	A1 Jewellers	700					*
The Fragrance Shop	A1 perfume	200 - 1,500			*		
Re Sole	A1 service	1,000 - 1,500		*	*		*
Supercuts	A1 service - hair	600 - 750	*		*		*
MegaSun Tanning	A1 service - beauty	1,000 - 2,000		*	*		*
Mail Boxes Etc	A1 service - delivery	300 - 500	*	*			*
Headmasters	A1 service - hair	900 - 2,000		*		*	
Wag Works	A1 service - pets	2,000 - 10,000		*			
Cigara	A1 vape store	250 - 700	*		*	*	
Total			13	13	20	13	20

Class A2/A3/A4/A5 operator space requirements (The Requirement List - February 2020)

Operator	Use	Size Sq.Ft	Balham	Clapham/ Battersea	Putney	Tooting	Wandsworth Town
Code Ninjas	A2 - training	1,200 - 2,000	*	*	*		
Metro Bank	A2 bank	3,500				*	*
Apres Food Co	A3 restaurant	n/a			*		
Arlo's	A3 restaurant	1,000 - 2,500				*	
Cote Brasserie	A3 restaurant	3,500			*		
Creams Café	A3 restaurant	1,400 - 2,000			*		
GDK	A3 restaurant	250 - 2,500	*	*	*	*	*
L'Osteria	A3 restaurant	3,800			*		*
Megan's Café	A3 restaurant	1,600 - 5,000			*		*
Oowee Vegan	A3 restaurant	800 - 1,000				*	
Wendy's	A3 restaurant	650 - 3,500			*		*
Arepa & Co	A3 restaurant	1,200 - 2,000		*	*		
Arlo's	A3 restaurant	1,000 - 2,500		*			
Cocotte Rotisserie	A3 restaurant	1,000 - 3,000		*			
Five Guys	A3 restaurant	2,500 - 4,000		*			
Flamboree	A3 restaurant	1,500 - 2,000	*	*	*		*
Slap Fish	A3 restaurant	1,000 - 2,500	*				
Soya	A3 restaurant	1,250 - 2,500	*	*			
Sushi Shop	A3 restaurant	700 - 1,500		*	*		
The Coconut Tree	A3 restaurant	1,750 - 4,000		*	*		
The Hut	A3 restaurant	1,000 - 5000		*			
Theo's	A3 restaurant	1,200 - 3,000	*				
Tootoomoo	A3 restaurant	2,000 - 3,000	*	*			*
Zia Lucia	A3 restaurant	750 - 1,500	*			*	
The Whiskey Thief	A3/A4 bar/restaurant	5,000 - 9,500	*				*
Brew Dog	A4 bar	1,800 - 5,000			*		
Brick & Liquor	A4 bar	1,000 - 2,000	*				
Lokkum Bar & Grill	A4 bar	2,500		*	*	*	*
The Toy Shop Bar	A4 bar	2,000 - 4,000				*	
Brunning & Price	A4 public house	3,500 - 10,000		*			
Goose Island	A4 public house	1,500 - 2,500		*		*	*
Head of Steam	A4 public house	2,500 - 8,000	*	*		*	*
Wadworth	A4 public house	2,000 - 6,000	*		*		
Chip Nation	A5 takeaway	300 - 1,500		*	*		
Jaqs	A5 takeaway	800 - 1,500			*		
Taco Bell	A5 takeaway	1,200 - 1,800	*	*		*	
Total			13	18	17	10	11

Class C1/D1/D2/SG operator space requirements (The Requirement List - February 2020)

Operator	Use	Size Sq.Ft	Balham	Clapham/ Battersea	Putney	Tooting	Wandsworth Town
EasyHotel	C1 hotel	20,000 - 50,000		*			*
Bloom Story	D1 family club	2,000 - 6,001		*	*		*
Dentix	D1 health	2,000 - 6,000			*		*
Medicetics	D1 health	1,200 - 2,000					*
The Dentist	D1 health	850 - 2,000			*		
Bright Horizons	D1 nursery	3,500 - 9,000	*	*	*		
Monkey Puzzle	D1 nursery	2,000 - 6,000			*		
Safari Kid	D1 nursery	2,500 - 10,000		*	*		*
Bright Young Things	D1 training/education	1,000 - 2,000		*	*		
Vets4Pets	D1 vet	1,500 - 2,000	*	*	*	*	*
Peace + Riot	D2 family club	3,500 - 5,000	*				*
Bootcamp Pilates	D2 gym/fitness	1,500 - 2,000					*
CGJ Fitness	D2 gym/fitness	1,800 - 4,000	*	*	*		
F45 Training	D2 gym/fitness	1,650 - 3,300	*				
Gracie Barra Jui Jitsui	D2 gym/fitness	2,000 - 2,500			*		
Movement LDN Boutique	D2 gym/fitness	1,500 - 3,500	*	*	*		
Pure Gym	D2 gym/fitness	6,000 - 20,000					*
RunThrough	D2 gym/fitness	2,000	*		*		
Snap Fitness	D2 gym/fitness	4,000 - 10,000	*	*	*	*	
The Complete Yoga Studio	D2 gym/fitness	1,000 - 1,500	*	*			*
The House of Yoga	D2 gym/fitness	1,000 - 1,300		*			
Triyoga	D2 gym/fitness	4,500 - 8,000		*			
GetSetGo!	D2 leisure	6,000 - 10,000	*		*		
Deliveroo	SG delivery	2,800 - 5,000					*
The London Wags Club	SG service - pets	2,000 - 10,000		*			*
Total			10	13	14	2	12

Appendix 5 Convenience goods capacity

Table 1: Wandsworth study area population

	2020	2025	2030	2035	2040
Zone 1 - Wandsworth	65,907	68,611	69,863	71,682	73,641
Zone 2 - Putney	48,910	49,466	49,438	50,318	51,562
Zone 3 - Roehampton	33,584	33,501	34,182	35,018	36,072
Zone 4 - Tooting	77,653	77,906	78,811	81,192	84,310
Zone 5 - Balham	104,140	104,250	105,562	110,013	113,573
Zone 6 - Clapham Junction	68,013	69,089	69,724	71,792	74,461
Zone 7 - VNEB/Clapham	101,202	108,707	117,287	124,299	129,613
Zone 8 - Fulham/Chelsea	55,196	55,585	55,771	57,594	59,624
Total	554,605	567,115	580,638	601,908	622,856

Sources: GLA 2018-based ward population projections - incorporating 2017 SHLAA assumptions

Table 2: Convenience goods expenditure per person (£)

	2020	2025	2030	2035	2040
Zone 1 - Wandsworth	2,195	2,185	2,182	2,186	2,190
Zone 2 - Putney	2,386	2,375	2,372	2,376	2,380
Zone 3 - Roehampton	1,750	1,742	1,740	1,743	1,746
Zone 4 - Tooting	2,005	1,996	1,993	1,996	2,000
Zone 5 - Balham	2,118	2,108	2,105	2,109	2,113
Zone 6 - Clapham Junction	2,228	2,217	2,214	2,218	2,222
Zone 7 - VNEB/Clapham	2,052	2,042	2,039	2,043	2,046
Zone 8 - Fulham/Chelsea	2,356	2,345	2,342	2,346	2,350

Sources: Experian 2018 base year local expenditure (2018 prices) and Retail Planner Briefing Note 17
Excludes Special Forms of Trading

Table 3: Total convenience goods expenditure (£M)

	2020	2025	2030	2035	2040
Zone 1 - Wandsworth	144.67	149.92	152.44	156.70	161.27
Zone 2 - Putney	116.70	117.48	117.27	119.56	122.72
Zone 3 - Roehampton	58.77	58.36	59.48	61.04	62.98
Zone 4 - Tooting	155.69	155.50	157.07	162.06	168.62
Zone 5 - Balham	220.57	219.76	222.21	232.02	239.98
Zone 6 - Clapham Junction	151.53	153.17	154.37	159.23	165.45
Zone 7 - VNEB/Clapham	207.67	221.98	239.15	253.94	265.19
Zone 8 - Fulham/Chelsea	130.04	130.35	130.62	135.12	140.12
Total	1,185.64	1,206.51	1,232.60	1,279.66	1,326.33

Source: Tables 1 and 2

Table 4: Base year 2020 convenience goods market shares (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Sainsbury's, Garratt Lane	27.3%	12.4%	6.0%	3.7%	0.9%	5.2%	1.3%	0.8%	2.0%
Waitrose, Southside	8.4%	3.1%	2.5%	0.5%	0.5%	1.3%	0.0%	0.0%	2.0%
Other Zone 1 in Borough	23.5%	5.1%	24.4%	5.9%	1.0%	4.1%	3.8%	1.3%	2.0%
Zone 1 - Wandsworth sub-total	59.2%	20.6%	32.9%	10.1%	2.4%	10.6%	5.1%	2.1%	
Sainsbury's, Werter Road	0.0%	8.4%	3.7%	0.0%	0.0%	0.0%	0.0%	1.0%	10.0%
Waitrose, Putney Exchange	0.3%	27.0%	4.3%	0.0%	0.0%	0.0%	0.0%	1.6%	10.0%
Other Zone 2 in Borough	1.5%	19.6%	1.2%	0.5%	1.4%	0.0%	1.0%	0.0%	10.0%
Zone 2 - Putney sub-total	1.8%	55.0%	9.2%	0.5%	1.4%	0.0%	1.0%	2.6%	
Asda, Roehampton Vale	2.7%	9.9%	24.2%	0.0%	0.0%	0.1%	0.0%	0.0%	30.0%
Other Zone 3 in Borough	0.1%	1.8%	6.1%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Zone 3 - Roehampton sub-total	2.8%	11.7%	30.3%	0.0%	0.0%	0.1%	0.0%	0.0%	
Sainsbury's, Tooting High Road	0.9%	0.0%	0.0%	12.6%	2.5%	0.0%	0.0%	0.0%	5.0%
Other Zone 4 in Borough	5.7%	0.0%	0.0%	39.7%	10.8%	0.0%	1.0%	4.3%	5.0%
Zone 4 - Tooting sub-total	6.6%	0.0%	0.0%	52.3%	13.3%	0.0%	1.0%	4.3%	
Sainsbury's, Balham High Road	0.5%	0.0%	0.0%	1.3%	21.5%	1.4%	0.1%	0.0%	2.0%
Waitrose, Balham High Road	0.4%	0.0%	0.0%	1.8%	13.7%	1.4%	0.3%	0.0%	2.0%
Other Zone 5 in Borough	2.5%	0.0%	0.0%	1.5%	18.0%	1.8%	1.9%	0.0%	2.0%
Zone 5 - Balham sub-total	3.4%	0.0%	0.0%	4.6%	53.2%	4.6%	2.3%	0.0%	
Asda, Lavender Hill	6.1%	0.0%	3.1%	0.7%	2.8%	22.4%	8.8%	0.9%	2.0%
Lidl, Falcon Lane	1.0%	0.9%	0.0%	0.0%	0.4%	4.6%	1.5%	1.1%	2.0%
Other Zone 6 in Borough	2.6%	0.0%	0.0%	0.0%	1.7%	33.0%	3.8%	1.7%	2.0%
Zone 6 - Clapham Jct sub-total	9.7%	0.9%	3.1%	0.7%	4.9%	60.0%	14.1%	3.7%	
Waitrose, New Union Square	0.2%	0.0%	0.0%	0.0%	0.2%	1.4%	4.6%	0.0%	10.0%
Other Zone 7 in Borough	0.0%	0.0%	0.0%	0.0%	0.0%	8.5%	9.3%	3.7%	5.0%
Zone 7 - VNEB/Clapham sub-total	0.2%	0.0%	0.0%	0.0%	0.2%	9.9%	13.9%	3.7%	
Wandsworth Borough total	83.7%	88.2%	75.5%	68.2%	75.4%	85.2%	37.4%	16.4%	
LB Hammersmith & Fulham	3.3%	0.2%	0.6%	0.5%	0.1%	5.7%	3.5%	74.2%	n/a
LB Kensington & Chelsea	0.1%	0.0%	0.3%	0.0%	0.6%	2.0%	0.1%	3.8%	n/a
LB Lambeth	1.9%	2.4%	0.0%	14.0%	20.7%	6.4%	52.0%	4.4%	n/a
LB Merton	10.2%	2.2%	18.0%	17.0%	2.2%	0.3%	4.1%	0.2%	n/a
LB Richmond	0.0%	2.3%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a
Other outside Wandsworth	0.8%	4.7%	3.5%	0.3%	1.0%	0.4%	2.9%	1.0%	n/a
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, February 2020 and Lichfields' analysis

Table 5: Base year 2020 convenience goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2020	144.67	116.70	58.77	155.69	220.57	151.53	207.67	130.04		1,185.64
Sainsbury's, Garratt Lane	39.49	14.47	3.53	5.76	1.99	7.88	2.70	1.04	1.57	78.42
Waitrose, Southside	12.15	3.62	1.47	0.78	1.10	1.97	0.00	0.00	0.43	21.52
Other Zone 1 in Borough	34.00	5.95	14.34	9.19	2.21	6.21	7.89	1.69	1.66	83.14
Zone 1 - Wandsworth sub-total	85.64	24.04	19.34	15.73	5.29	16.06	10.59	2.73	3.66	183.08
Sainsbury's, Werter Road	0.00	9.80	2.17	0.00	0.00	0.00	0.00	1.30	1.48	14.75
Waitrose, Putney Exchange	0.43	31.51	2.53	0.00	0.00	0.00	0.00	2.08	4.06	40.61
Other Zone 2 in Borough	2.17	22.87	0.71	0.78	3.09	0.00	2.08	0.00	3.52	35.21
Zone 2 - Putney sub-total	2.60	64.18	5.41	0.78	3.09	0.00	2.08	3.38	9.06	90.58
Asda, Roehampton Vale	3.91	11.55	14.22	0.00	0.00	0.15	0.00	0.00	12.79	42.62
Other Zone 3 in Borough	0.14	2.10	3.59	0.00	0.00	0.00	0.00	0.00	0.31	6.14
Zone 3 - Roehampton sub-total	4.05	13.65	17.81	0.00	0.00	0.15	0.00	0.00	13.09	48.76
Sainsbury's, Tooting High Road	1.30	0.00	0.00	19.62	5.51	0.00	0.00	0.00	1.39	27.82
Other Zone 4 in Borough	8.25	0.00	0.00	61.81	23.82	0.00	2.08	5.59	5.34	106.89
Zone 4 - Tooting sub-total	9.55	0.00	0.00	81.43	29.34	0.00	2.08	5.59	6.74	134.72
Sainsbury's, Balham High Road	0.72	0.00	0.00	2.02	47.42	2.12	0.21	0.00	1.07	53.57
Waitrose, Balham High Road	0.58	0.00	0.00	2.80	30.22	2.12	0.62	0.00	0.74	37.09
Other Zone 5 in Borough	3.62	0.00	0.00	2.34	39.70	2.73	3.95	0.00	1.07	53.40
Zone 5 - Balham sub-total	4.92	0.00	0.00	7.16	117.34	6.97	4.78	0.00	2.88	144.05
Asda, Lavender Hill	8.82	0.00	1.82	1.09	6.18	33.94	18.27	1.17	1.46	72.76
Lidl, Falcon Lane	1.45	1.05	0.00	0.00	0.88	6.97	3.11	1.43	0.30	15.20
Other Zone 6 in Borough	3.76	0.00	0.00	0.00	3.75	50.01	7.89	2.21	1.38	69.00
Zone 6 - Clapham Jct sub-total	14.03	1.05	1.82	1.09	10.81	90.92	29.28	4.81	3.14	156.95
Waitrose, New Union Square	0.29	0.00	0.00	0.00	0.44	2.12	9.55	0.00	1.38	13.78
Other Zone 7 in Borough	0.00	0.00	0.00	0.00	0.00	12.88	19.31	4.81	1.95	38.95
Zone 7 - VNEB/Clapham sub-total	0.29	0.00	0.00	0.00	0.44	15.00	28.87	4.81	3.33	52.74
Wandsworth Borough total	121.09	102.93	44.37	106.18	166.31	129.11	77.67	21.33	41.89	810.87
LB Hammersmith & Fulham	4.77	0.23	0.35	0.78	0.22	8.64	7.27	96.49	475.02	593.78
LB Kensington & Chelsea	0.14	0.00	0.18	0.00	1.32	3.03	0.21	4.94	481.39	491.22
LB Lambeth	2.75	2.80	0.00	21.80	45.66	9.70	107.99	5.72	364.76	561.17
LB Merton	14.76	2.57	10.58	26.47	4.85	0.45	8.51	0.26	387.89	456.35
LB Richmond	0.00	2.68	1.23	0.00	0.00	0.00	0.00	0.00	387.91	391.83
Other outside Wandsworth	1.16	5.48	2.06	0.47	2.21	0.61	6.02	1.30	366.72	386.02
Total	144.67	116.70	58.77	155.69	220.57	151.53	207.67	130.04	2,505.59	3,691.23

Source: Table 3 and Table 4

Table 6: Future 2025 convenience goods shopping patterns (£M) - constant market shares

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2025	149.92	117.48	58.36	155.50	219.76	153.17	221.98	130.35		1,206.51
Zone 1 - Wandsworth	88.75	24.20	19.20	15.71	5.27	16.24	11.32	2.74	3.74	187.17
Zone 2 - Putney	2.70	64.61	5.37	0.78	3.08	0.00	2.22	3.39	9.13	91.27
Zone 3 - Roehampton	4.20	13.75	17.68	0.00	0.00	0.15	0.00	0.00	13.23	49.01
Zone 4 - Tooting	9.89	0.00	0.00	81.33	29.23	0.00	2.22	5.60	6.75	135.02
Zone 5 - Balham	5.10	0.00	0.00	7.15	116.91	7.05	5.11	0.00	2.88	144.20
Zone 6 - Clapham Junction	14.54	1.06	1.81	1.09	10.77	91.90	31.30	4.82	3.21	160.50
Zone 7 - VNEB/Clapham	0.30	0.00	0.00	0.00	0.44	15.16	30.86	4.82	3.29	54.87
Wandsworth Borough total	125.48	103.62	44.06	106.05	165.70	130.50	83.02	21.38	42.24	822.05
Outside Wandsworth Borough	24.44	13.86	14.30	49.45	54.06	22.67	138.96	108.97	6,685.05	7,111.75
Total	149.92	117.48	58.36	155.50	219.76	153.17	221.98	130.35	6,727.29	7,933.80

Source: Table 3 and Table 4

Table 7A: Retail commitments - convenience goods floorspace and turnover

Zone		Sales Floorspace (sq.m net)	Convenience floorspace (%)	Convenience floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Zone 1 - Wandsworth		0		0		£0.00
	Sub-total	0		0		£0.00
Zone 2 - Putney		0		0		£0.00
	Sub-total	0		0		£0.00
Zone 3 - Roehampton	Replacement Sainsbury Local, Wimbledon Park Rd	270	95%	257	£11,526	£2.96
	Alton Estate regeneration (net increase)	225	100%	225	£7,000	£1.58
	Sub-total	495		482		£4.53
Zone 4 - Tooting		0		0		£0.00
	Sub-total	0		0		£0.00
Zone 5 - Balham		0		0		£0.00
	Sub-total	0		0		£0.00
Zone 6 - Clapham Jct	Enlarged Lidl, Falcon Lane	669	80%	535	£10,542	£5.64
	North of Clapham Jct / Winstanley Est. regeneration	600	100%	600	£7,000	£4.20
	Other retail commitments (30% of all A1)	715	100%	715	£7,000	£5.01
	Sub-total	1,984		1,850		£14.85
Zone 7 - VNEB	VNEB - 15% of committed Class A1 floorspace	4,618	100%	4,618	£7,000	£32.33
	Sub-total	4,618		4,618		£32.33
Wandsworth Borough Total		7,097		6,950		£51.70

Source: Wandsworth Local Plan - Authority Monitoring Report 2018/2019 and planning application details

Table 7B: Retail commitments - convenience goods trade draw

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 3 - commitments										
% trade draw	0.0%	25.0%	70.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	100.0%
Trade draw (£M)	£0.00	£1.13	£3.17	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23	£4.53
Zone 6 - commitments										
% trade draw	5.0%	1.0%	0.0%	0.0%	5.0%	67.0%	15.0%	5.0%	2.0%	100.0%
Trade draw (£M)	£0.74	£0.15	£0.00	£0.00	£0.74	£9.95	£2.23	£0.74	£0.30	£14.85
Zone 7 - commitments										
% trade draw	0.0%	0.0%	0.0%	0.0%	0.0%	25.0%	45.0%	5.0%	25.0%	100.0%
Trade draw (£M)	£0.00	£0.00	£0.00	£0.00	£0.00	£8.08	£14.55	£1.62	£8.08	£32.33
Wandsworth Borough total	£0.74	£1.28	£3.17	£0.00	£0.74	£18.03	£16.77	£2.36	£8.61	£51.70

Source: Table 7A, NEMS Household Survey, February 2020 and Lichfields' analysis

Table 8: Future 2025 convenience goods shopping patterns (£M) - with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2025	149.92	117.48	58.36	155.50	219.76	153.17	221.98	130.35		1,206.51
Commitments	0.74	1.28	3.17	0.00	0.74	18.03	16.77	2.36	8.61	51.70
Zone 1 - Wandsworth	88.37	23.97	18.42	15.71	5.26	15.14	10.66	2.69	3.74	183.96
Zone 2 - Putney	2.69	63.99	5.15	0.78	3.07	0.00	2.09	3.33	9.12	90.21
Zone 3 - Roehampton	4.16	13.48	16.24	0.00	0.00	0.13	0.00	0.00	13.20	47.21
Zone 4 - Tooting	9.85	0.00	0.00	81.33	29.17	0.00	2.09	5.51	6.74	134.69
Zone 5 - Balham	5.05	0.00	0.00	7.15	116.41	6.10	4.51	0.00	2.88	142.11
Zone 6 - Clapham Junction	14.42	1.04	1.66	1.09	10.72	79.51	27.67	4.66	3.20	143.97
Zone 7 - VNEB/Clapham	0.30	0.00	0.00	0.00	0.44	13.12	27.28	4.66	3.28	49.08
Wandsworth Borough total	125.58	103.75	44.64	106.05	165.81	132.03	91.08	23.21	50.76	842.93
Outside Wandsworth Borough	24.33	13.73	13.72	49.45	53.95	21.14	130.90	107.13	6,676.53	7,090.87
Total	149.92	117.48	58.36	155.50	219.76	153.17	221.98	130.35	6,727.29	7,933.80

Source: Table 6 and Table 7B

Table 9: Future 2030 convenience goods shopping patterns (£M) - with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2030	152.44	117.27	59.48	157.07	222.21	154.37	239.15	130.62		1,232.60
Zone 1 - Wandsworth	89.86	23.92	18.77	15.86	5.32	15.26	11.49	2.70	3.82	187.00
Zone 2 - Putney	2.73	63.87	5.25	0.79	3.10	0.00	2.25	3.34	9.31	90.65
Zone 3 - Roehampton	4.23	14.59	19.79	0.00	0.00	0.13	0.00	0.00	13.72	52.45
Zone 4 - Tooting	10.02	0.00	0.00	82.15	29.49	0.00	2.25	5.52	6.89	136.32
Zone 5 - Balham	5.14	0.00	0.00	7.23	117.71	6.14	4.86	0.00	2.94	144.02
Zone 6 - Clapham Junction	15.42	1.18	1.69	1.10	11.59	90.16	32.21	5.41	3.57	162.34
Zone 7 - VNEB/Clapham	0.30	0.00	0.00	0.00	0.44	21.37	45.06	6.29	11.61	85.07
Wandsworth Borough total	127.70	103.56	45.50	107.12	167.66	133.06	98.12	23.26	51.86	857.85
Outside Wandsworth Borough	24.74	13.70	13.98	49.95	54.55	21.31	141.02	107.35	6,820.87	7,247.47
Total	152.44	117.27	59.48	157.07	222.21	154.37	239.15	130.62	6,872.73	8,105.33

Source: Table 6 and Table 7B

Table 10: Future 2035 convenience goods shopping patterns (£M) - with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2035	156.70	119.56	61.04	162.06	232.02	159.23	253.94	135.12		1,279.66
Zone 1 - Wandsworth	92.37	24.39	19.26	16.37	5.56	15.74	12.20	2.79	3.97	192.64
Zone 2 - Putney	2.81	65.12	5.39	0.81	3.24	0.00	2.39	3.45	9.67	92.88
Zone 3 - Roehampton	4.35	14.87	20.30	0.00	0.00	0.14	0.00	0.00	14.24	53.90
Zone 4 - Tooting	10.30	0.00	0.00	84.76	30.79	0.00	2.39	5.71	7.15	141.10
Zone 5 - Balham	5.28	0.00	0.00	7.45	122.91	6.34	5.16	0.00	3.05	150.19
Zone 6 - Clapham Junction	15.85	1.21	1.74	1.13	12.10	93.00	34.20	5.60	3.71	168.54
Zone 7 - VNEB/Clapham	0.31	0.00	0.00	0.00	0.46	22.04	47.85	6.51	12.05	89.22
Wandsworth Borough total	131.26	105.58	46.69	110.52	175.06	137.26	104.19	24.06	53.84	888.48
Outside Wandsworth Borough	25.43	13.97	14.34	51.53	56.95	21.98	149.75	111.05	7,081.30	7,526.32
Total	156.70	119.56	61.04	162.06	232.02	159.23	253.94	135.12	7,135.14	8,414.80

Source: Table 6 and Table 7B

Table 11: Future 2040 convenience goods shopping patterns (£M) - with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2040	161.27	122.72	62.98	168.62	239.98	165.45	265.19	140.12		1,326.33
Zone 1 - Wandsworth	95.07	25.03	19.88	17.03	5.75	16.36	12.74	2.89	4.11	198.86
Zone 2 - Putney	2.89	66.84	5.56	0.84	3.35	0.00	2.50	3.58	10.02	95.59
Zone 3 - Roehampton	4.48	15.26	20.95	0.00	0.00	0.14	0.00	0.00	14.76	55.59
Zone 4 - Tooting	10.60	0.00	0.00	88.19	31.85	0.00	2.50	5.92	7.41	146.47
Zone 5 - Balham	5.44	0.00	0.00	7.76	127.12	6.58	5.39	0.00	3.16	155.46
Zone 6 - Clapham Junction	16.31	1.24	1.79	1.18	12.52	96.63	35.72	5.81	3.85	175.04
Zone 7 - VNEB/Clapham	0.32	0.00	0.00	0.00	0.48	22.90	49.96	6.75	12.49	92.90
Wandsworth Borough total	135.10	108.38	48.18	115.00	181.07	142.62	108.81	24.95	55.81	919.91
Outside Wandsworth Borough	26.18	14.34	14.80	53.62	58.91	22.84	156.38	115.16	7,339.57	7,801.80
Total	161.27	122.72	62.98	168.62	239.98	165.45	265.19	140.12	7,395.37	8,721.70

Source: Table 6 and Table 7B

Table 12A: Wandsworth West - Convenience goods floorspace and benchmark turnover

Zone	Stores	Sales Floorspace (sq.m net)	Convenience floorspace (%)	Convenience floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Zone 1 Wandsworth	Co-op, Buckhold Road, Wandsworth Town	191	95%	182	£11,171	£2.03
	Co-op, East Hill, Wandsworth Town	337	95%	320	£11,171	£3.57
	Co-op, Garratt Lane, Wandsworth Town	337	95%	320	£11,171	£3.57
	M&S Foodhall, Wimbledon Park Road, Southfields	553	95%	525	£10,313	£5.42
	M&S Simply Food, Swandon Road, Wandsworth Town	84	95%	79	£10,313	£0.82
	Planet Organic, Southside, Wandsworth Town	296	95%	281	£10,000	£2.81
	Sainsburys Local, Magdalen Road, Earlsfield	251	95%	239	£11,526	£2.75
	Sainsburys Local, Old York Road, Wandsworth Town	189	95%	180	£11,526	£2.07
	Sainsburys Local, St Johns Hill, Clapham Junction	181	95%	171	£11,526	£1.98
	Sainsburys, Garratt Lane, Wandsworth Town	7,375	65%	4,794	£11,526	£55.25
	Tesco Express, 190-194 Garratt Lane	226	95%	214	£13,236	£2.84
	Tesco Express, Garratt Lane, Summerstown	197	95%	187	£13,236	£2.48
	Tesco Express, Garratts Lane, Earlsfield	254	95%	241	£13,236	£3.19
	Tesco Express, High Street, Wandsworth Town	211	95%	200	£13,236	£2.65
	Tesco Express, Replingham Road, Southfields	198	95%	188	£13,236	£2.49
	Waitrose, Southside Shopping Centre, Wandsworth Town	1,948	90%	1,754	£12,420	£21.78
	Wandsworth Town other	880	100%	880	£7,000	£6.16
	Earlsfield LC other	560	100%	560	£7,000	£3.92
	Southfields LC other	770	100%	770	£7,000	£5.39
	Important Local Parades Zone 1 other	585	100%	585	£7,000	£4.10
	Sub-total	15,622		12,671		£135.27
Zone 2 Putney	Co-op, Upper Richmond Road, Putney	435	95%	413	£11,171	£4.62
	McColls, Upper Richmond Road, Putney	40	95%	38	£7,000	£0.26
	Sainsburys Local, Enterprise Way, Osiers Gate	250	95%	237	£11,526	£2.73
	Sainsburys Local, Lower Richmond Road, Putney	116	95%	110	£11,526	£1.27
	Sainsburys Local, Upper Richmond Road West, Putney	189	95%	180	£11,526	£2.07
	Sainsburys Local, Upper Richmond Road, East Putney	328	95%	312	£11,526	£3.59
	Sainsburys Local, Upper Richmond Road, Putney	319	95%	303	£11,526	£3.49
	Sainsburys, Werter Road, Putney	1,998	85%	1,698	£11,526	£19.57
	Tesco Express, Putney High Street, Putney	187	95%	178	£13,236	£2.35
	Tesco Express, Upper Richmond Road, Putney	185	95%	175	£13,236	£2.32
	Waitrose (Little), Upper Richmond Road, Putney	253	95%	240	£12,420	£2.98
	Waitrose, Putney Exchange, Putney High Street	2,084	95%	1,980	£12,420	£24.59
	Putney Town Centre other	1,840	100%	1,840	£7,000	£12.88
	Important Local Parades Zone 2 other	1,600	100%	1,600	£7,000	£11.20
		Sub-total	9,823		9,304	
Zone 3 Roehampton	Asda, Roehampton Vale	5,996	70%	4,197	£13,618	£57.16
	Co-op, Inner Park Road	199	95%	189	£11,171	£2.11
	Co-op, Roehampton Vale	84	95%	79	£11,171	£0.89
	Sainsburys Local, Wimbledon Park Road, Southfields	196	95%	186	£11,526	£2.15
	Roehampton LC	1,230	100%	1,230	£7,000	£8.61
	Important Local Parades Zone 3 other	1,285	100%	1,285	£7,000	£9.00
	Sub-total	8,989		7,167		£79.90
Wandsworth Borough West Total		34,434		29,141		£309.11

Table 12B: Wandsworth East - Convenience goods floorspace and benchmark turnover

Zone	Stores	Sales Floorspace (sq.m net)	Convenience floorspace (%)	Convenience floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Zone 4 Tooting	Aldi, Tooting High Street, Tooting	520	90%	468	£10,542	£4.93
	Budgens, Moyser Road	193	95%	183	£8,354	£1.53
	Iceland, Mitcham Road, Tooting	475	95%	451	£6,645	£3.00
	Lidl, Tooting	325	90%	293	£10,542	£3.09
	Lidl, Tooting High Street	396	90%	356	£10,542	£3.76
	M&S Simply Food, St Georges Hospital, Tooting	699	95%	664	£10,313	£6.85
	Sainsburys Local, Mitcham Lane	220	95%	209	£11,526	£2.41
	Sainsburys Local, Mitcham Road, Tooting	188	95%	179	£11,526	£2.06
	Sainsburys, Tooting High Street	2,334	85%	1,984	£11,526	£22.87
	Tesco Express, Mitcham Road, Tooting	329	95%	312	£13,236	£4.13
	Tesco Express, Upper Tooting Road, Tooting	315	95%	299	£13,236	£3.96
	Tooting Town Centre other	4,710	100%	4,710	£7,000	£32.97
	Mitcham Lane LC other	680	100%	680	£7,000	£4.76
	Important Local Parades Zone 4 other	1,000	100%	1,000	£7,000	£7.00
Sub-total		12,384		11,788		£103.31
Zone 5 Balham	Aldi, Balham High Road, Balham	872	90%	785	£10,542	£8.27
	Co-op, Balham High Road, Balham	63	95%	60	£11,171	£0.67
	Co-op, Balham Hill, Balham	264	95%	251	£11,171	£2.80
	Lidl, Balham High Road, Tooting Bec	441	90%	396	£10,542	£4.18
	M&S Simply Food, Balham Hill, Clapham South	339	95%	322	£10,313	£3.32
	M&S Simply Food, Trinity Road, Tooting Bec	84	95%	79	£10,313	£0.82
	Sainsburys Local, Bellevue Road, Wandsworth Common	194	95%	184	£11,526	£2.12
	Sainsburys Local, Nightingale Lane, Balham	116	95%	110	£11,526	£1.27
	Sainsburys Local, Tooting Bec Road, Tooting	212	95%	202	£11,526	£2.33
	Sainsburys, Balham High Road	2,950	85%	2,507	£11,526	£28.90
	Tesco Express, Balham High Road, Balham	116	95%	110	£13,236	£1.46
	Waitrose, Balham High Road, Balham	1,401	90%	1,261	£12,420	£15.66
	Balham Town Centre other	1,470	100%	1,470	£7,000	£10.29
	Bellevue Road LC other	250	100%	250	£7,000	£1.75
	Clapham South LC other	700	100%	700	£7,000	£4.90
	Tooting Bec LC other	510	100%	510	£7,000	£3.57
Important Local Parades Zone 5 other	150	100%	150	£7,000	£1.05	
Sub-total		10,131		9,348		£93.36
Zone 6 Clapham Junction	Asda, Lavender Hill, Clapham Junction	6,464	70%	4,525	£13,618	£61.62
	Co-op, Battersea Bridge Road, Battersea	242	95%	230	£11,171	£2.57
	Co-op, Chatfield Road, Battersea	337	95%	320	£11,171	£3.57
	Co-op, Lavender Hill	337	95%	320	£11,171	£3.57
	Co-op, Northcote Road, Battersea	936	95%	890	£11,171	£9.94
	Lidl, Falcon Lane, Clapham Junction	924	90%	832	£10,542	£8.77
	M&S Foodhall, St Johns Road, Clapham Junction	400	95%	380	£10,313	£3.92
	M&S Simply Food, Clapham Junction Station, St John's Hill	179	95%	170	£10,313	£1.75
	Sainsburys Local, Battersea Park Road, Battersea	280	95%	266	£11,526	£3.07
	Sainsburys Local, Clapham Junction, St John's Hill	250	95%	238	£11,526	£2.74
	Tesco Express, Battersea Reach	235	95%	223	£13,236	£2.95
	Tesco Express, Battersea Rise, Clapham Junction	158	95%	150	£13,236	£1.99
	Tesco Express, Falcon Road, Battersea	222	95%	211	£13,236	£2.79
	Waitrose, Saint Johns Road, Clapham Junction	1,546	90%	1,392	£12,420	£17.28
	Whole Foods Market, Lavender Hill, Clapham Junction	314	95%	299	£7,000	£2.09
	Clapham Junction Town Centre other	1,860	100%	1,860	£7,000	£13.02
	Battersea Park Road LC other	690	100%	690	£7,000	£4.83
	Lavender Hill LC other	130	100%	130	£7,000	£0.91
	Important Local Parades Zone 6 other	380	100%	380	£7,000	£2.66
	Sub-total		15,885		13,504	
Zone 7 VNEB Clapham	Sainsburys Local, Tideway Industrial Estate, Nine Elms	250	95%	237	£11,526	£2.73
	Tesco Metro, Battersea Park Road, Battersea	791	90%	712	£13,236	£9.42
	Waitrose (Little), Queenstown Road, Nine Elms	84	95%	79	£12,420	£0.99
	Waitrose, New Union Square, Nine Elms	1,928	90%	1,735	£12,420	£21.55
	Important Local Parades Zone 7 other	80	100%	80	£7,000	£0.56
Sub-total		3,132		2,843		£35.25
Wandsworth Borough Total		41,531		37,484		£381.96

Source: ORC StorePoint food store data (Q4/2019), Global Data company average sales densities (2019) and Wandsworth Borough's land use survey 2018

Table 13: Summary of convenience goods expenditure 2020 to 2040

	2020	2025	2030	2035	2040
Available Expenditure in Wandsworth (£m)					
Zone 1 - Wandsworth	183.08	183.96	187.00	192.64	198.86
Zone 2 - Putney	90.58	90.21	90.65	92.88	95.59
Zone 3 - Roehampton	48.76	51.75	52.45	53.90	55.59
Zone 4 - Tooting	134.72	134.69	136.32	141.10	146.47
Zone 5 - Balham	144.05	142.11	144.02	150.19	155.46
Zone 6 - Clapham Junction	156.95	158.82	162.34	168.54	175.04
Zone 7 - VNEB/Clapham	52.74	81.40	85.07	89.22	92.90
Total	810.87	842.93	857.85	888.48	919.91
Turnover existing facilities/commitments (£m)					
Zone 1 - Wandsworth	183.08	183.08	183.08	183.08	183.08
Zone 2 - Putney	90.58	90.58	90.58	90.58	90.58
Zone 3 - Roehampton	48.76	53.29	53.29	53.29	53.29
Zone 4 - Tooting	134.72	134.72	134.72	134.72	134.72
Zone 5 - Balham	144.05	144.05	144.05	144.05	144.05
Zone 6 - Clapham Junction	156.95	171.80	171.80	171.80	171.80
Zone 7 - VNEB/Clapham	52.74	85.06	85.06	85.06	85.06
Total	810.87	862.58	862.58	862.58	862.58
Surplus/Deficit Expenditure (£m)					
Zone 1 - Wandsworth	0.00	0.88	3.92	9.56	15.77
Zone 2 - Putney	0.00	-0.37	0.07	2.30	5.01
Zone 3 - Roehampton	0.00	-1.54	-0.84	0.61	2.31
Zone 4 - Tooting	0.00	-0.03	1.60	6.39	11.75
Zone 5 - Balham	0.00	-1.95	-0.03	6.14	11.41
Zone 6 - Clapham Junction	0.00	-12.98	-9.46	-3.26	3.24
Zone 7 - VNEB/Clapham	0.00	-3.66	0.01	4.16	7.84
Total	0.00	-19.65	-4.73	25.90	57.33

Source: Tables 5 to 12

Table 14: Convenience goods floorspace capacity

	2020	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000	£12,000
Sales floorspace capacity (sq.m net)					
Zone 1 - Wandsworth	0	73	327	797	1,314
Zone 2 - Putney	0	-30	6	192	417
Zone 3 - Roehampton	0	-128	-70	51	192
Zone 4 - Tooting	0	-2	134	532	980
Zone 5 - Balham	0	-162	-3	512	950
Zone 6 - Clapham Junction	0	-1,082	-788	-272	270
Zone 7 - VNEB/Clapham	0	-305	1	346	654
Total	0	-1,637	-394	2,159	4,777
Gross floorspace capacity (sq.m gross)					
Zone 1 - Wandsworth	0	97	436	1,062	1,752
Zone 2 - Putney	0	-41	8	256	556
Zone 3 - Roehampton	0	-171	-93	68	256
Zone 4 - Tooting	0	-3	178	710	1,306
Zone 5 - Balham	0	-216	-4	683	1,267
Zone 6 - Clapham Junction	0	-1,443	-1,051	-362	360
Zone 7 - VNEB/Clapham	0	-407	1	462	871
Total	0	-2,183	-525	2,878	6,370

Source: Table 13

Appendix 6 Comparison goods capacity

Table 1: Wandsworth study area population

	2020	2025	2030	2035	2040
Zone 1 - Wandsworth	65,907	68,611	69,863	71,682	73,641
Zone 2 - Putney	48,910	49,466	49,438	50,318	51,562
Zone 3 - Roehampton	33,584	33,501	34,182	35,018	36,072
Zone 4 - Tooting	77,653	77,906	78,811	81,192	84,310
Zone 5 - Balham	104,140	104,250	105,562	110,013	113,573
Zone 6 - Clapham Junction	68,013	69,089	69,724	71,792	74,461
Zone 7 - VNEB/Clapham	101,202	108,707	117,287	124,299	129,613
Zone 8 - Fulham/Chelsea	55,196	55,585	55,771	57,594	59,624
Total	554,605	567,115	580,638	601,908	622,856

Sources: GLA 2018-based ward population projections - incorporating 2017 SHLAA assumptions

Table 2: Comparison goods expenditure per person (£)

	2020	2025	2030	2035	2040
Zone 1 - Wandsworth	3,714	4,156	4,691	5,352	6,154
Zone 2 - Putney	4,022	4,501	5,080	5,796	6,665
Zone 3 - Roehampton	2,668	2,985	3,369	3,844	4,421
Zone 4 - Tooting	3,021	3,381	3,816	4,354	5,007
Zone 5 - Balham	3,521	3,940	4,447	5,074	5,835
Zone 6 - Clapham Junction	3,655	4,089	4,616	5,266	6,056
Zone 7 - VNEB/Clapham	3,159	3,535	3,990	4,553	5,235
Zone 8 - Fulham/Chelsea	4,057	4,540	5,124	5,846	6,723

Sources: Experian 2018 base year local expenditure (2018 prices) and Retail Planner Briefing Note 17
Excludes Special Forms of Trading

Table 3: Total comparison goods expenditure (£M)

	2020	2025	2030	2035	2040
Zone 1 - Wandsworth	244.78	285.15	327.73	383.64	453.19
Zone 2 - Putney	196.72	222.65	251.15	291.64	343.66
Zone 3 - Roehampton	89.60	100.00	115.16	134.61	159.47
Zone 4 - Tooting	234.59	263.40	300.74	353.51	422.14
Zone 5 - Balham	366.68	410.75	469.43	558.21	662.70
Zone 6 - Clapham Junction	248.59	282.50	321.85	378.06	450.94
Zone 7 - VNEB/Clapham	319.70	384.28	467.98	565.93	678.52
Zone 8 - Fulham/Chelsea	223.93	252.36	285.77	336.69	400.85
Total	1,924.58	2,201.08	2,539.80	3,002.29	3,571.47

Source: Tables 1 and 2

Table 4: Base year 2020 comparison goods market shares (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Zone 1 - Wandsworth	36.2%	13.7%	22.8%	7.5%	7.5%	12.5%	6.8%	7.8%	5.0%
Zone 2 - Putney	0.9%	24.1%	4.7%	0.3%	0.0%	0.3%	0.1%	6.1%	15.0%
Zone 3 - Roehampton	0.1%	2.0%	7.9%	0.2%	0.0%	0.0%	0.5%	0.1%	30.0%
Zone 4 - Tooting	3.6%	0.0%	0.2%	19.1%	6.6%	0.4%	1.1%	0.3%	10.0%
Zone 5 - Balham	0.2%	0.0%	0.5%	2.3%	14.0%	1.4%	1.9%	0.0%	5.0%
Zone 6 - Clapham Junction	8.3%	1.0%	4.7%	2.1%	7.6%	25.2%	11.9%	2.2%	10.0%
Zone 7 - VNEB/Clapham	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.8%	0.0%	10.0%
Wandsworth Borough total	49.3%	40.8%	40.8%	31.5%	35.7%	39.9%	23.1%	16.5%	
LB Croydon	4.4%	0.8%	1.2%	7.0%	4.4%	2.2%	3.6%	0.7%	n/a
LB Hammersmith & Fulham	12.8%	10.1%	3.5%	5.8%	7.2%	13.9%	6.7%	33.7%	n/a
LB Kensington & Chelsea	6.1%	8.4%	4.2%	2.9%	12.3%	16.0%	10.3%	21.3%	n/a
LB Lambeth	0.5%	0.1%	2.8%	6.4%	7.1%	4.7%	21.9%	5.0%	n/a
LB Merton	9.4%	6.1%	18.2%	27.7%	10.7%	4.5%	5.9%	4.8%	n/a
LB Richmond	0.1%	2.9%	3.0%	0.0%	0.0%	0.3%	0.0%	0.4%	n/a
LB Westminster	0.1%	0.0%	0.2%	0.3%	0.2%	0.9%	0.6%	0.3%	n/a
Other outside Wandsworth	17.3%	30.8%	26.1%	18.4%	22.4%	17.6%	27.9%	17.3%	n/a
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, February 2020 and Lichfields' analysis

Table 5: Base year 2020 comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2020	244.78	196.72	89.60	234.59	366.68	248.59	319.70	223.93		1,924.58
Zone 1 - Wandsworth	88.61	26.95	20.43	17.59	27.50	31.07	21.74	17.47	13.23	264.59
Zone 2 - Putney	2.20	47.41	4.21	0.70	0.00	0.75	0.32	13.66	12.22	81.47
Zone 3 - Roehampton	0.24	3.93	7.08	0.47	0.00	0.00	1.60	0.22	5.81	19.36
Zone 4 - Tooting	8.81	0.00	0.18	44.81	24.20	0.99	3.52	0.67	9.24	92.42
Zone 5 - Balham	0.49	0.00	0.45	5.40	51.33	3.48	6.07	0.00	3.54	70.76
Zone 6 - Clapham Junction	20.32	1.97	4.21	4.93	27.87	62.64	38.04	4.93	18.32	183.23
Zone 7 - VNEB/Clapham	0.00	0.00	0.00	0.00	0.00	0.25	2.56	0.00	0.31	3.12
Wandsworth Borough total	120.68	80.26	36.56	73.90	130.90	99.19	73.85	36.95	62.67	714.95
LB Croydon	10.77	1.57	1.08	16.42	16.13	5.47	11.51	1.57	1,225.88	1,290.40
LB Hammersmith & Fulham	31.33	19.87	3.14	13.61	26.40	34.55	21.42	75.46	903.12	1,128.90
LB Kensington & Chelsea	14.93	16.52	3.76	6.80	45.10	39.77	32.93	47.70	1,867.71	2,075.23
LB Lambeth	1.22	0.20	2.51	15.01	26.03	11.68	70.01	11.20	256.05	393.92
LB Merton	23.01	12.00	16.31	64.98	39.23	11.19	18.86	10.75	588.99	785.32
LB Richmond	0.24	5.70	2.69	0.00	0.00	0.75	0.00	0.90	503.68	513.95
LB Westminster	0.24	0.00	0.18	0.70	0.73	2.24	1.92	0.67	662.15	668.84
Other outside Wandsworth	42.35	60.59	23.39	43.16	82.14	43.75	89.20	38.74	1,693.23	2,116.54
Wandsworth Borough total	113.33	114.88	51.97	144.27	219.64	143.93	234.34	185.41	6,474.92	7,682.70
Total	244.78	196.72	89.60	234.59	366.68	248.59	319.70	223.93	7,763.47	9,688.05

Source: Table 3 and Table 4

Table 6: Future 2025 comparison goods shopping patterns (£M) - constant market shares

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2025	285.15	222.65	100.00	263.40	410.75	282.50	384.28	252.36		2,201.08
Zone 1 - Wandsworth	103.22	30.50	22.80	19.76	30.81	35.31	26.13	19.68	15.17	303.38
Zone 2 - Putney	2.57	53.66	4.70	0.79	0.00	0.85	0.38	15.39	13.82	92.16
Zone 3 - Roehampton	0.29	4.45	7.90	0.53	0.00	0.00	1.92	0.25	6.57	21.91
Zone 4 - Tooting	10.27	0.00	0.20	50.31	27.11	1.13	4.23	0.76	10.44	104.44
Zone 5 - Balham	0.57	0.00	0.50	6.06	57.50	3.96	7.30	0.00	3.99	79.88
Zone 6 - Clapham Junction	23.67	2.23	4.70	5.53	31.22	71.19	45.73	5.55	21.09	210.90
Zone 7 - VNEB/Clapham	0.00	0.00	0.00	0.00	0.00	0.28	3.07	0.00	0.37	3.73
Wandsworth Borough total	140.58	90.84	40.80	82.97	146.64	112.72	88.77	41.64	71.47	816.42
Outside Wandsworth Borough	144.57	131.81	59.20	180.43	264.11	169.79	295.51	210.72	7,644.67	9,100.80
Total	285.15	222.65	100.00	263.40	410.75	282.50	384.28	252.36	7,716.14	9,917.22

Source: Table 3 and Table 4

Table 7A: Retail commitments - comparison goods floorspace and turnover at 2025

Zone		Sales Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Zone 1 - Wandsworth	Loss of Homebase, Swandon Way	-3,000	£2,000	-£6.00
	Other retail commitments (net loss)	-100	£8,000	-£0.80
	Sub-total	-3,100		-£6.80
Zone 2 - Putney	Retail commitments (net loss)	-30	£8,000	-£0.24
	Sub-total	-30		-£0.24
Zone 3 - Roehampton	Alton Estate regeneration (net increase)	225	£8,000	£1.80
	Sub-total	225		£1.80
Zone 4 - Tooting	Retail commitments (net loss)	-70	£8,000	-£0.56
	Sub-total	-70		-£0.56
Zone 5 - Balham	Retail commitments (net loss)	-270	£8,000	-£2.16
	Sub-total	-270		-£2.16
Zone 6 - Clapham Junction	Retail commitments (60% of all A1)	2,100	£8,000	£16.80
	Sub-total	2,100		£16.80
Zone 7 - VNEB	VNEB - 75% of committed Class A1 floorspace	26,400	£8,000	£211.20
	Sub-total	26,400		£211.20
Wandsworth Borough Total		25,255		£220.04

Source: Wandsworth Local Plan - Authority Monitoring Report 2018/2019 and planning application details

Table 7B: Retail commitments - comparison goods floorspace trade draw

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 1 - commitments										
% trade draw	40.0%	10.0%	5.0%	5.0%	10.0%	10.0%	10.0%	5.0%	5.0%	100.0%
Trade draw (£M)	-£2.72	-£0.68	-£0.34	-£0.34	-£0.68	-£0.68	-£0.68	-£0.34	-£0.34	-£6.80
Zone 2 - commitments										
% trade draw	5.0%	60.0%	5.0%	0.0%	0.0%	0.0%	0.0%	15.0%	15.0%	100.0%
Trade draw (£M)	-£0.01	-£0.14	-£0.01	£0.00	£0.00	£0.00	£0.00	-£0.04	-£0.04	-£0.24
Zone 3 - commitments										
% trade draw	0.0%	40.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	100.0%
Trade draw (£M)	£0.00	£0.72	£0.90	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£1.80
Zone 4 - commitments										
% trade draw	10.0%	0.0%	0.0%	50.0%	25.0%	0.0%	5.0%	0.0%	10.0%	100.0%
Trade draw (£M)	-£0.06	£0.00	£0.00	-£0.28	-£0.14	£0.00	-£0.03	£0.00	-£0.06	-£0.56
Zone 5 - commitments										
% trade draw	0.0%	0.0%	0.0%	10.0%	70.0%	5.0%	10.0%	0.0%	5.0%	100.0%
Trade draw (£M)	£0.00	£0.00	£0.00	-£0.22	-£1.51	-£0.11	-£0.22	£0.00	-£0.11	-£2.16
Zone 6 - commitments										
% trade draw	10.0%	0.0%	0.0%	0.0%	10.0%	40.0%	25.0%	5.0%	10.0%	100.0%
Trade draw (£M)	£1.68	£0.00	£0.00	£0.00	£1.68	£6.72	£4.20	£0.84	£1.68	£16.80
Zone 7 - commitments										
% trade draw	5.0%	0.0%	0.0%	5.0%	10.0%	10.0%	35.0%	5.0%	30.0%	100.0%
Trade draw (£M)	£10.56	£0.00	£0.00	£10.56	£21.12	£21.12	£73.92	£10.56	£63.36	£211.20
Wandsworth Borough total	£9.45	-£0.10	£0.55	£9.72	£20.47	£27.05	£77.20	£11.02	£64.68	£220.04

Source: Table 7A, NEMS Household Survey, February 2020 and Lichfields' analysis

Table 8: Future 2025 comparison goods shopping patterns (£M) with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2025	285.15	222.65	100.00	263.40	410.75	282.50	384.28	252.36		2,201.08
Zone 1 - Wandsworth	100.92	30.51	22.72	19.29	29.81	33.19	23.12	19.21	15.11	293.89
Zone 1 - commitments	-2.72	-0.68	-0.34	-0.34	-0.68	-0.68	-0.68	-0.34	-0.34	-6.80
Zone 2 - Putney	2.51	53.67	4.68	0.77	0.00	0.80	0.34	15.03	13.77	91.57
Zone 2 - commitments	-0.01	-0.14	-0.01	0.00	0.00	0.00	0.00	-0.04	-0.04	-0.24
Zone 3 - Roehampton	0.28	4.45	7.89	0.52	0.00	0.00	1.87	0.25	6.57	21.84
Zone 3 - commitments	0.00	0.72	0.90	0.00	0.00	0.00	0.00	0.00	0.18	1.80
Zone 4 - Tooting	10.15	0.00	0.20	49.72	26.67	1.10	3.98	0.75	10.42	102.99
Zone 4 - commitments	-0.06	0.00	0.00	-0.28	-0.14	0.00	-0.03	0.00	-0.06	-0.56
Zone 5 - Balham	0.56	0.00	0.50	5.99	56.57	3.84	6.88	0.00	3.99	78.33
Zone 5 - commitments	0.00	0.00	0.00	-0.22	-1.51	-0.11	-0.22	0.00	-0.11	-2.16
Zone 6 - Clapham Junction	23.14	2.23	4.68	5.40	30.21	66.91	40.47	5.42	21.00	199.46
Zone 6 - commitments	1.68	0.00	0.00	0.00	1.68	6.72	4.20	0.84	1.68	16.80
Zone 7 - VNEB/Clapham	0.00	0.00	0.00	0.00	0.00	0.27	2.90	0.00	0.37	3.54
Zone 7 - commitments	10.56	0.00	0.00	10.56	21.12	21.12	73.92	10.56	63.36	211.20
Wandsworth Borough total	147.02	90.76	41.22	91.42	163.73	133.15	156.76	51.68	135.90	1,011.65
Other outside Wandsworth	138.13	131.88	58.78	171.98	247.02	149.35	227.52	200.67	7,580.24	8,905.57
Total	285.15	222.65	100.00	263.40	410.75	282.50	384.28	252.36	7,716.14	9,917.22

Source: Table 6 and Table 7B

Table 9: Future 2030 comparison goods shopping patterns (£M) - with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2030	327.73	251.15	115.16	300.74	469.43	321.85	467.98	285.77		2,539.80
Zone 1 - Wandsworth	112.87	33.65	25.77	21.64	33.29	37.04	27.33	21.37	17.04	330.00
Zone 2 - Putney	2.87	60.38	5.38	0.88	0.00	0.91	0.41	16.98	15.84	103.65
Zone 3 - Roehampton	0.33	5.84	10.13	0.60	0.00	0.00	2.27	0.28	7.79	27.23
Zone 4 - Tooting	11.60	0.00	0.23	56.45	30.32	1.25	4.82	0.85	11.96	117.48
Zone 5 - Balham	0.65	0.00	0.57	6.59	62.93	4.25	8.12	0.00	4.47	87.58
Zone 6 - Clapham Junction	28.53	2.51	5.39	6.17	36.44	83.88	54.40	7.09	26.17	250.58
Zone 7 - VNEB/Clapham	12.14	0.00	0.00	12.06	24.14	24.37	93.55	11.96	73.54	251.75
Wandsworth Borough total	168.98	102.38	47.47	104.38	187.12	151.69	190.90	58.53	156.81	1,168.27
Outside Wandsworth Borough	158.75	148.77	67.69	196.36	282.31	170.15	277.07	227.24	8,746.75	10,275.10
Total	327.73	251.15	115.16	300.74	469.43	321.85	467.98	285.77	8,903.57	11,443.37

Source: Table 3 and Table 8

Table 10: Future 2035 comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2035	383.64	291.64	134.61	353.51	558.21	378.06	565.93	336.69		3,002.29
Zone 1 - Wandsworth	132.12	39.08	30.12	25.44	39.59	43.50	33.05	25.18	20.14	388.23
Zone 2 - Putney	3.36	70.12	6.29	1.04	0.00	1.07	0.50	20.00	18.73	121.10
Zone 3 - Roehampton	0.38	6.78	11.84	0.70	0.00	0.00	2.75	0.33	9.20	31.98
Zone 4 - Tooting	13.58	0.00	0.27	66.35	36.06	1.47	5.83	1.00	14.14	138.69
Zone 5 - Balham	0.76	0.00	0.67	7.75	74.83	4.99	9.82	0.00	5.29	104.10
Zone 6 - Clapham Junction	33.39	2.92	6.30	7.25	43.33	98.53	65.78	8.35	30.94	296.80
Zone 7 - VNEB/Clapham	14.21	0.00	0.00	14.17	28.70	28.63	113.13	14.09	86.93	299.86
Wandsworth Borough total	197.81	118.89	55.49	122.70	222.51	178.19	230.86	68.96	185.37	1,380.76
Outside Wandsworth Borough	185.84	172.76	79.12	230.81	335.70	199.87	335.07	267.74	10,339.53	12,146.43
Total	383.64	291.64	134.61	353.51	558.21	378.06	565.93	336.69	10,524.90	13,527.19

Source: Table 3 and Table 8

Table 11: Future 2040 comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2040	453.19	343.66	159.47	422.14	662.70	450.94	678.52	400.85		3,571.47
Zone 1 - Wandsworth	156.07	46.05	35.69	30.37	47.00	51.89	39.63	29.98	23.96	460.64
Zone 2 - Putney	3.97	82.62	7.45	1.24	0.00	1.27	0.60	23.81	22.28	143.24
Zone 3 - Roehampton	0.45	7.99	14.02	0.84	0.00	0.00	3.30	0.40	10.95	37.94
Zone 4 - Tooting	16.04	0.00	0.32	79.24	42.80	1.75	6.99	1.19	16.82	165.15
Zone 5 - Balham	0.90	0.00	0.80	9.25	88.84	5.95	11.77	0.00	6.29	123.79
Zone 6 - Clapham Junction	39.45	3.44	7.47	8.66	51.45	117.53	78.87	9.94	36.80	353.60
Zone 7 - VNEB/Clapham	16.78	0.00	0.00	16.92	34.08	34.15	135.64	16.77	103.41	357.75
Wandsworth Borough total	233.66	140.09	65.74	146.52	264.16	212.54	276.79	82.10	220.51	1,642.11
Outside Wandsworth Borough	219.52	203.57	93.73	275.62	398.54	238.40	401.73	318.76	12,299.70	14,449.58
Total	453.19	343.66	159.47	422.14	662.70	450.94	678.52	400.85	12,520.22	16,091.69

Source: Table 3 and Table 8

Table 12: Comparison goods sales floorspace (sq.m net)

Zone	Location	Sales Floorspace (sq.m net)
Zone 1 - Wandsworth	Wandsworth town centre	18,362
	Homebase, Swandon Way	3,000
	Roche Bobois, Smugglers Way	700
	Earlsfield local centre	950
	Southfields local centre	1,150
	Comparison sales in food stores	2,951
	Important local parades in Zone 1	1,365
	Sub-total	28,478
Zone 2 - Putney	Putney town centre	14,370
	Comparison sales in food stores in Zone 2	519
	Important local parades in Zone 2	520
	Sub-total	15,409
Zone 3 - Roehampton	Roehampton local centre	620
	Comparison sales in food stores in Zone 3	1,823
	Important local parades in Zone 3	150
	Sub-total	2,593
Zone 4 - Tooting	Tooting town centre	17,500
	Mitcham Lane local centre	1,465
	Comparison sales in food stores in Zone 4	595
	Important local parades in Zone 4	390
	Sub-total	19,950
Zone 5 - Balham	Balham town centre	5,850
	Tooting Bec local centre	640
	Bellevue Road local centre	505
	Clapham South local centre	600
	Comparison sales in food stores in Zone 5	783
	Important local parades in Zone 5	160
	Sub-total	8,538
Zone 6 - Clapham Junction	Clapham Junction town centre	17,540
	Battersea Park Road local centre	1,845
	Lavender Hill/Queenstown Road local centre	1,160
	Comparison sales in food stores in Zone 6	2,381
	Barker and Stonehouse	2,000
	Halford, Battersea	700
	Pets at Home, Battersea	400
	Important local parades in Zone 6	800
	Sub-total	26,826
Zone 7 - VNEB/Clapham	Comparison sales in food stores in Zone 7	289
	Important local parades in Zone 7	190
	Sub-total	479
Wandsworth Borough Total		102,273

Source: Wandsworth Borough's land use survey 2018, ORC StorePoint and VOA

Table 13: Summary of comparison goods expenditure 2020 to 2035

	2020	2025	2030	2035	2040
Available expenditure for Borough (£m)					
Zone 1 - Wandsworth	264.59	287.09	330.00	388.23	460.64
Zone 2 - Putney	81.47	91.33	103.65	121.10	143.24
Zone 3 - Roehampton	19.36	21.84	27.23	31.98	37.94
Zone 4 - Tooting	92.42	102.43	117.48	138.69	165.15
Zone 5 - Balham	70.76	76.17	87.58	104.10	123.79
Zone 6 - Clapham Junction	183.23	216.26	250.58	296.80	353.60
Zone 7 - VNEB/Clapham	3.12	214.74	251.75	299.86	357.75
Total	714.95	1,009.85	1,168.27	1,380.76	1,642.11
Turnover existing facilities/commitments (£m)					
Zone 1 - Wandsworth	264.59	295.50	337.60	385.70	440.66
Zone 2 - Putney	81.47	92.84	106.07	121.18	138.45
Zone 3 - Roehampton	19.36	23.91	27.32	31.21	35.66
Zone 4 - Tooting	92.42	105.03	120.00	137.10	156.63
Zone 5 - Balham	70.76	78.68	89.89	102.70	117.34
Zone 6 - Clapham Junction	183.23	226.13	258.36	295.17	337.23
Zone 7 - VNEB/Clapham	3.12	214.76	245.36	280.33	320.27
Total	714.95	1,036.86	1,184.61	1,353.40	1,546.24
Surplus/deficit expenditure (£m)					
Zone 1 - Wandsworth	0.00	-8.41	-7.60	2.52	19.98
Zone 2 - Putney	0.00	-1.51	-2.42	-0.09	4.79
Zone 3 - Roehampton	0.00	-2.08	-0.09	0.77	2.28
Zone 4 - Tooting	0.00	-2.60	-2.52	1.59	8.51
Zone 5 - Balham	0.00	-2.52	-2.31	1.40	6.45
Zone 6 - Clapham Junction	0.00	-9.88	-7.78	1.63	16.37
Zone 7 - VNEB/Clapham	0.00	-0.02	6.39	19.54	37.49
Total	0.00	-27.01	-16.34	27.36	95.86

Source: Tables 5 to 12

Table 14: Comparison goods floorspace capacity

	2020	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£7,000	£7,997	£9,137	£10,439	£11,926
Sales floorspace capacity (sq.m net)					
Zone 1 - Wandsworth	n/a	-1,051	-832	242	1,675
Zone 2 - Putney	n/a	-189	-265	-8	402
Zone 3 - Roehampton	n/a	-260	-10	74	191
Zone 4 - Tooting	n/a	-325	-276	153	714
Zone 5 - Balham	n/a	-315	-253	134	541
Zone 6 - Clapham Junction	n/a	-1,235	-851	157	1,373
Zone 7 - VNEB/Clapham	n/a	-2	699	1,872	3,143
Total	n/a	-3,378	-1,788	2,621	8,038
Gross floorspace capacity (sq.m gross)					
Zone 1 - Wandsworth	n/a	-1,314	-1,040	302	2,094
Zone 2 - Putney	n/a	-237	-331	-10	502
Zone 3 - Roehampton	n/a	-325	-13	92	239
Zone 4 - Tooting	n/a	-407	-345	191	892
Zone 5 - Balham	n/a	-393	-317	167	676
Zone 6 - Clapham Junction	n/a	-1,544	-1,064	196	1,716
Zone 7 - VNEB/Clapham	n/a	-3	874	2,340	3,929
Total	n/a	-4,222	-2,235	3,277	10,048

Source: Table 13

Appendix 7 Food/beverage capacity

Table 1: Wandsworth study area population

	2020	2025	2030	2035	2035
Zone 1 - Wandsworth	65,907	68,611	69,863	71,682	73,641
Zone 2 - Putney	48,910	49,466	49,438	50,318	51,562
Zone 3 - Roehampton	33,584	33,501	34,182	35,018	36,072
Zone 4 - Tooting	77,653	77,906	78,811	81,192	84,310
Zone 5 - Balham	104,140	104,250	105,562	110,013	113,573
Zone 6 - Clapham Junction	68,013	69,089	69,724	71,792	74,461
Zone 7 - VNEB/Clapham	101,202	108,707	117,287	124,299	129,613
Zone 8 - Fulham/Chelsea	55,196	55,585	55,771	57,594	59,624
Total	554,605	567,115	580,638	601,908	622,856

Sources: GLA 2018-based ward population projections - incorporating 2017 SHLAA assumptions

Table 2: Food and beverage expenditure per person (£)

	2020	2025	2030	2035	2040
Zone 1 - Wandsworth	2,168	2,296	2,428	2,564	2,708
Zone 2 - Putney	2,462	2,608	2,757	2,912	3,076
Zone 3 - Roehampton	1,409	1,492	1,578	1,666	1,760
Zone 4 - Tooting	1,627	1,724	1,823	1,925	2,033
Zone 5 - Balham	2,104	2,229	2,357	2,489	2,629
Zone 6 - Clapham Junction	2,257	2,391	2,528	2,670	2,820
Zone 7 - VNEB/Clapham	2,031	2,152	2,275	2,403	2,538
Zone 8 - Fulham/Chelsea	2,541	2,692	2,846	3,006	3,175

Sources: Experian 2018 base year local expenditure (2018 prices) and Retail Planner Briefing Note 17

Table 3: Total food and beverage expenditure (£M)

	2020	2025	2030	2035	2040
Zone 1 - Wandsworth	142.89	157.53	169.63	183.79	199.42
Zone 2 - Putney	120.42	129.01	136.30	146.53	158.60
Zone 3 - Roehampton	47.32	49.98	53.94	58.34	63.49
Zone 4 - Tooting	126.34	134.31	143.67	156.29	171.40
Zone 5 - Balham	219.11	232.37	248.81	273.82	298.58
Zone 6 - Clapham Junction	153.51	165.19	176.26	191.68	209.98
Zone 7 - VNEB/Clapham	205.54	233.94	266.83	298.69	328.96
Zone 8 - Fulham/Chelsea	140.25	149.63	158.72	173.13	189.31
Total	1,155.37	1,251.97	1,354.16	1,482.28	1,619.74

Source: Tables 1 and 2

Table 4: Base year 2020 food and beverage market shares (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Zone 1 - Wandsworth	45.6%	7.7%	14.6%	5.5%	10.0%	12.6%	3.6%	0.6%	5.0%
Zone 2 - Putney	6.9%	47.1%	11.5%	0.5%	0.2%	2.1%	0.1%	12.9%	10.0%
Zone 3 - Roehampton	0.2%	2.0%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%
Zone 4 - Tooting	8.9%	0.3%	3.2%	42.4%	13.4%	0.3%	1.0%	2.2%	10.0%
Zone 5 - Balham	2.6%	0.0%	2.3%	2.8%	26.9%	2.4%	3.1%	0.8%	5.0%
Zone 6 - Clapham Junction	8.1%	0.3%	4.4%	4.3%	2.9%	28.8%	8.8%	0.0%	5.0%
Zone 7 - VNEB/Clapham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	10.0%
Wandsworth Borough sub-total	72.3%	57.4%	39.3%	55.5%	53.4%	46.2%	17.2%	16.5%	
LB Lambeth	5.3%	0.1%	0.7%	10.1%	14.8%	15.5%	35.5%	0.0%	65.0%
LB Hammersmith & Fulham	1.3%	8.6%	3.2%	3.0%	0.2%	3.0%	4.4%	29.1%	85.0%
LB Kensington & Chelsea	0.0%	3.3%	6.0%	0.0%	3.3%	10.2%	5.5%	13.2%	95.0%
LB Merton	0.5%	1.2%	2.7%	6.5%	0.5%	1.0%	0.2%	0.8%	95.0%
LB Richmond	6.1%	6.3%	17.7%	6.6%	1.4%	2.7%	0.0%	2.1%	90.0%
Other outside Wandsworth	14.5%	23.1%	30.4%	18.3%	26.4%	21.4%	37.2%	38.3%	90.0%
Other total	27.7%	42.6%	60.7%	44.5%	46.6%	53.8%	82.8%	83.5%	90.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, February 2020 and Lichfields' analysis

Table 5: Base year 2020 food and beverage expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2020	142.89	120.42	47.32	126.34	219.11	153.51	205.54	140.25		1,155.37
Zone 1 - Wandsworth	65.16	9.27	6.91	6.95	21.91	19.34	7.40	0.84	7.25	145.03
Zone 2 - Putney	9.86	56.72	5.44	0.63	0.44	3.22	0.21	18.09	10.51	105.12
Zone 3 - Roehampton	0.29	2.41	1.56	0.00	0.00	0.00	0.00	0.00	1.06	5.32
Zone 4 - Tooting	12.72	0.36	1.51	53.57	29.36	0.46	2.06	3.09	11.46	114.58
Zone 5 - Balham	3.72	0.00	1.09	3.54	58.94	3.68	6.37	1.12	4.13	82.59
Zone 6 - Clapham Junction	11.57	0.36	2.08	5.43	6.35	44.21	18.09	0.00	4.64	92.74
Zone 7 - VNEB/Clapham	0.00	0.00	0.00	0.00	0.00	0.00	1.23	0.00	0.14	1.37
Wandsworth Borough sub-total	103.31	69.12	18.60	70.12	117.01	70.92	35.35	23.14	39.19	546.75
LB Lambeth	7.57	0.12	0.33	12.76	32.43	23.79	72.97	0.00	278.52	428.50
LB Hammersmith & Fulham	1.86	10.36	1.51	3.79	0.44	4.61	9.04	40.81	410.37	482.79
LB Kensington & Chelsea	0.00	3.97	2.84	0.00	7.23	15.66	11.30	18.51	1,130.87	1,190.39
LB Merton	0.71	1.44	1.28	8.21	1.10	1.54	0.41	1.12	300.45	316.26
LB Richmond	8.72	7.59	8.38	8.34	3.07	4.14	0.00	2.95	388.57	431.74
Other outside Wandsworth	20.72	27.82	14.39	23.12	57.85	32.85	76.46	53.72	2,762.23	3,069.14
Other total	39.58	51.30	28.72	56.22	102.11	82.59	170.19	117.11	5,271.00	5,918.81
Total	142.89	120.42	47.32	126.34	219.11	153.51	205.54	140.25	5,310.19	6,465.56

Source: Table 3 and Table 4

Table 6: Future 2025 food and beverage expenditure patterns (£M) - constant market shares

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2025	157.53	129.01	49.98	134.31	232.37	165.19	233.94	149.63		1,251.97
Zone 1 - Wandsworth	71.83	9.93	7.30	7.39	23.24	20.81	8.42	0.90	7.89	157.71
Zone 2 - Putney	10.87	60.76	5.75	0.67	0.46	3.47	0.23	19.30	11.28	112.80
Zone 3 - Roehampton	0.32	2.58	1.65	0.00	0.00	0.00	0.00	0.00	1.14	5.68
Zone 4 - Tooting	14.02	0.39	1.60	56.95	31.14	0.50	2.34	3.29	12.25	122.47
Zone 5 - Balham	4.10	0.00	1.15	3.76	62.51	3.96	7.25	1.20	4.42	88.35
Zone 6 - Clapham Junction	12.76	0.39	2.20	5.78	6.74	47.58	20.59	0.00	5.05	101.08
Zone 7 - VNEB/Clapham	0.00	0.00	0.00	0.00	0.00	0.00	1.40	0.00	0.16	1.56
Wandsworth Borough sub-total	113.89	74.05	19.64	74.54	124.09	76.32	40.24	24.69	42.18	589.64
Other outside Wandsworth	43.64	54.96	30.34	59.77	108.29	88.87	193.70	124.95	6,340.55	7,045.05
Total	157.53	129.01	49.98	134.31	232.37	165.19	233.94	149.63	6,382.72	7,634.69

Source: Table 3 and Table 4

Table 7A: Food/beverage commitments - floorspace and turnover

Zone		Floorspace (sq.m)	Turnover (£ per sq.m)	Total Turnover (£m)
Zone 1 - Wandsworth	Ram Quarter - available units	4,146	£6,000	£24.88
	Other commitments (net increase)	404	£6,000	£2.42
	Sub-total	4,550		£27.30
Zone 2 - Putney	All commitments (net increase)	323	£6,000	£1.94
	Sub-total	323		£1.94
Zone 3 - Roehampton	Sub-total	0		£0.00
Zone 4 - Tooting	All commitments (net increase)	1,717	£6,000	£10.30
	Sub-total	1,717		£10.30
Zone 5 - Balham	All commitments (net increase)	773	£6,000	£4.64
	Sub-total	773		£4.64
Zone 6 - Clapham Junction	All commitments (net loss)	-197	£6,000	-£1.18
	North of Clapham Jct / Winstanley regeneration	800	£6,000	£4.80
	Sub-total	603		£3.62
Zone 7 - VNEB	All commitments (net increase)	31,367	£6,000	£188.20
	Sub-total	31,367		£188.20
Wandsworth Borough Total		39,333		£236.00

Source: Wandsworth Local Plan - Authority Monitoring Report 2018/2019, agent's and planning application details

Table 7B: Food/beverage commitments trade draw

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 1 - commitments										
% trade draw	40.0%	10.0%	5.0%	5.0%	10.0%	10.0%	10.0%	5.0%	5.0%	100.0%
Trade draw (£M)	£10.92	£2.73	£1.37	£1.37	£2.73	£2.73	£2.73	£1.37	£1.37	£27.30
Zone 2 - commitments										
% trade draw	5.0%	60.0%	5.0%	0.0%	0.0%	0.0%	0.0%	15.0%	15.0%	100.0%
Trade draw (£M)	£0.10	£1.16	£0.10	£0.00	£0.00	£0.00	£0.00	£0.29	£0.29	£1.94
Zone 4 - commitments										
% trade draw	10.0%	0.0%	0.0%	50.0%	25.0%	0.0%	5.0%	0.0%	10.0%	100.0%
Trade draw (£M)	£1.03	£0.00	£0.00	£5.15	£2.58	£0.00	£0.52	£0.00	£1.03	£10.30
Zone 5 - commitments										
% trade draw	0.0%	0.0%	0.0%	10.0%	70.0%	5.0%	10.0%	0.0%	5.0%	100.0%
Trade draw (£M)	£0.00	£0.00	£0.00	£0.46	£3.25	£0.23	£0.46	£0.00	£0.23	£4.64
Zone 6 - commitments										
% trade draw	10.0%	0.0%	0.0%	0.0%	15.0%	40.0%	25.0%	0.0%	10.0%	100.0%
Trade draw (£M)	£0.36	£0.00	£0.00	£0.00	£0.54	£1.45	£0.90	£0.00	£0.36	£3.62
Zone 7 - commitments										
% trade draw	5.0%	0.0%	0.0%	5.0%	10.0%	10.0%	35.0%	5.0%	30.0%	100.0%
Trade draw (£M)	£9.41	£0.00	£0.00	£9.41	£18.82	£18.82	£65.87	£9.41	£56.46	£188.20
Wandsworth Borough total	£21.82	£3.89	£1.46	£16.39	£27.92	£23.23	£70.48	£11.07	£59.74	£236.00

Source: Table 7A, NEMS Household Survey, February 2020 and Lichfields' analysis

Table 8: Future 2025 food and beverage expenditure patterns (£M) - with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2025	157.53	129.01	49.98	134.31	232.37	165.19	233.94	149.63		1,251.97
Zone 1 - Wandsworth	62.67	9.68	7.13	6.49	20.70	18.49	6.61	0.85	7.84	140.46
Zone 1 - commitments	10.92	2.73	1.37	1.37	2.73	2.73	2.73	1.37	1.37	27.30
Zone 2 - Putney	9.48	59.23	5.61	0.59	0.41	3.08	0.18	18.29	11.21	108.09
Zone 2 - commitments	0.10	1.16	0.10	0.00	0.00	0.00	0.00	0.29	0.29	1.94
Zone 3 - Roehampton	0.31	2.56	1.64	0.00	0.00	0.00	0.00	0.00	1.13	5.64
Zone 4 - Tooting	13.13	0.38	1.58	53.48	29.44	0.47	2.09	3.21	12.21	115.98
Zone 4 - commitments	1.03	0.00	0.00	5.15	2.58	0.00	0.52	0.00	1.03	10.30
Zone 5 - Balham	3.70	0.00	1.13	3.42	57.38	3.63	6.08	1.15	4.40	80.89
Zone 5 - commitments	0.00	0.00	0.00	0.46	3.25	0.23	0.46	0.00	0.23	4.64
Zone 6 - Clapham Junction	11.13	0.38	2.15	5.07	6.00	42.27	16.16	0.00	5.02	87.54
Zone 6 - commitments	0.36	0.00	0.00	0.00	0.54	1.45	0.90	0.00	0.36	3.62
Zone 7 - VNEB/Clapham	0.00	0.00	0.00	0.00	0.00	0.00	1.18	0.00	0.16	1.33
Zone 7 - commitments	9.41	0.00	0.00	9.41	18.82	18.82	65.87	9.41	56.46	188.20
Wandsworth Borough sub-total	122.24	76.13	20.70	85.44	141.85	91.18	102.78	34.56	101.70	775.94
Other outside Wandsworth	35.29	52.88	29.28	48.87	90.53	74.01	131.16	115.08	6,281.02	6,858.11
Total	157.53	129.01	49.98	134.31	232.37	165.19	233.94	149.63	6,382.72	7,634.05

Source: Table 3 and Table 7B

Table 9: Future 2030 food and beverage expenditure patterns (£M) - with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2030	169.63	136.30	53.94	143.67	248.81	176.26	266.83	158.72		1,354.16
Zone 1 - Wandsworth	79.24	13.11	9.16	8.40	25.08	22.65	10.65	2.35	9.95	180.61
Zone 2 - Putney	10.32	63.81	6.16	0.63	0.44	3.29	0.21	19.71	12.44	117.00
Zone 3 - Roehampton	0.33	2.71	1.77	0.00	0.00	0.00	0.00	0.00	1.23	6.03
Zone 4 - Tooting	15.24	0.40	1.71	62.72	34.28	0.50	2.97	3.40	14.32	135.54
Zone 5 - Balham	3.99	0.00	1.22	4.15	64.92	4.12	7.47	1.22	5.01	92.09
Zone 6 - Clapham Junction	12.38	0.40	2.32	5.43	7.01	46.65	19.46	0.00	5.82	99.46
Zone 7 - VNEB/Clapham	10.13	0.00	0.00	10.07	20.15	20.08	76.47	9.98	61.24	208.12
Wandsworth Borough sub-total	131.63	80.43	22.34	91.40	151.88	97.29	117.23	36.66	110.00	838.86
Other outside Wandsworth	38.00	55.87	31.60	52.27	96.93	78.97	149.60	122.07	6,793.72	7,419.03
Total	169.63	136.30	53.94	143.67	248.81	176.26	266.83	158.72	6,903.73	8,257.89

Source: Table 3 and Table 8

Table 10: Future 2035 food and beverage expenditure patterns (£M) - with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2035	183.79	146.53	58.34	156.29	273.82	191.68	298.69	173.13		1,482.28
Zone 1 - Wandsworth	85.86	14.10	9.91	9.14	27.61	24.63	11.92	2.56	10.89	196.63
Zone 2 - Putney	11.18	68.59	6.67	0.69	0.49	3.58	0.23	21.49	13.62	126.53
Zone 3 - Roehampton	0.36	2.91	1.91	0.00	0.00	0.00	0.00	0.00	1.34	6.52
Zone 4 - Tooting	16.52	0.43	1.85	68.23	37.72	0.54	3.32	3.71	15.67	148.00
Zone 5 - Balham	4.32	0.00	1.32	4.52	71.44	4.48	8.36	1.33	5.48	101.25
Zone 6 - Clapham Junction	13.41	0.43	2.51	5.90	7.71	50.73	21.78	0.00	6.37	108.85
Zone 7 - VNEB/Clapham	10.98	0.00	0.00	10.95	22.18	21.84	85.61	10.89	67.03	229.47
Wandsworth Borough sub-total	142.62	86.47	24.16	99.43	167.15	105.80	131.23	39.98	120.41	917.25
Other outside Wandsworth	41.17	60.06	34.18	56.86	106.67	85.88	167.46	133.14	7,436.46	8,121.90
Total	183.79	146.53	58.34	156.29	273.82	191.68	298.69	173.13	7,556.88	9,039.15

Source: Table 3 and Table 8

Table 11: Future 2040 food and beverage expenditure patterns (£M) - with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available expenditure 2040	199.42	158.60	63.49	171.40	298.58	209.98	328.96	189.31		1,619.74
Zone 1 - Wandsworth	93.16	15.26	10.79	10.02	30.10	26.98	13.13	2.80	11.90	214.15
Zone 2 - Putney	12.13	74.25	7.25	0.75	0.53	3.92	0.26	23.50	14.88	137.47
Zone 3 - Roehampton	0.39	3.15	2.08	0.00	0.00	0.00	0.00	0.00	1.47	7.09
Zone 4 - Tooting	17.92	0.47	2.01	74.83	41.13	0.59	3.66	4.06	17.13	161.80
Zone 5 - Balham	4.69	0.00	1.43	4.95	77.90	4.91	9.20	1.45	5.99	110.54
Zone 6 - Clapham Junction	14.55	0.46	2.73	6.47	8.41	55.57	23.99	0.00	6.97	119.15
Zone 7 - VNEB/Clapham	11.91	0.00	0.00	12.01	24.18	23.92	94.28	11.90	73.25	251.46
Wandsworth Borough sub-total	154.75	93.60	26.30	109.04	182.26	115.90	144.52	43.72	131.58	1,001.66
Other outside Wandsworth	44.67	65.01	37.19	62.36	116.32	94.08	184.43	145.59	8,126.10	8,875.76
Total	199.42	158.60	63.49	171.40	298.58	209.98	328.96	189.31	8,257.68	9,877.42

Source: Table 3 and Table 8

Table 12: Food and beverage floorspace

Zone	Location	Floorspace (sq.m net)
Zone 1 - Wandsworth	Wandsworth town centre	5,220
	Earlsfield local centre	2,480
	Southfields local centre	1,070
	Important local parades in Zone 1	1,625
	Sub-total	10,395
Zone 2 - Putney	Putney town centre	9,040
	Important local parades in Zone 2	2,095
	Sub-total	11,135
Zone 3 - Roehampton	Roehampton local centre	1,560
	Important local parades in Zone 3	130
	Sub-total	1,690
Zone 4 - Tooting	Tooting town centre	9,160
	Mitcham Lane local centre	1,010
	Important local parades in Zone 4	1,015
	Sub-total	11,185
Zone 5 - Balham	Balham town centre	6,440
	Tooting Bec local centre	1,240
	Bellevue Road local centre	1,670
	Clapham South local centre	365
	Important local parades in Zone 5	160
	Sub-total	9,875
Zone 6 - Clapham Junction	Clapham Junction town centre	11,930
	Battersea Park Road local centre	1,625
	Lavender Hill/Queenstown Road local centre	1,820
	Important local parades in Zone 6	560
	Sub-total	15,935
Zone 7 - VNEB/Clapham	Battersea Power Station	200
	Important local parades in Zone 7	180
	Sub-total	380
Wandsworth Borough Total		60,595

Source: Wandsworth Borough's land use survey 2018

Table 13: Summary of food and beverage expenditure 2020 to 2040

	2020	2025	2030	2035	2040
Available expenditure for Borough (£m)					
Zone 1 - Wandsworth	145.03	167.76	180.61	196.63	214.15
Zone 2 - Putney	105.12	110.03	117.00	126.53	137.47
Zone 3 - Roehampton	5.32	5.68	6.03	6.52	7.09
Zone 4 - Tooting	114.58	126.28	135.54	148.00	161.80
Zone 5 - Balham	82.59	85.53	92.09	101.25	110.54
Zone 6 - Clapham Junction	92.74	91.16	99.46	108.85	119.15
Zone 7 - VNEB/Clapham	1.37	189.53	208.12	229.47	251.46
Total	546.75	775.97	838.86	917.25	1,001.66
Benchmark turnover existing facilities (£m)					
Zone 1 - Wandsworth	145.03	181.12	190.36	200.07	210.28
Zone 2 - Putney	105.12	112.52	118.26	124.29	130.63
Zone 3 - Roehampton	5.32	5.59	5.88	6.18	6.49
Zone 4 - Tooting	114.58	131.25	137.95	144.99	152.38
Zone 5 - Balham	82.59	91.68	96.35	101.27	106.43
Zone 6 - Clapham Junction	92.74	101.27	106.44	111.87	117.57
Zone 7 - VNEB/Clapham	1.37	199.24	209.41	220.09	231.31
Total	546.75	822.68	864.64	908.75	955.10
Surplus/deficit expenditure (£m)					
Zone 1 - Wandsworth	0.00	-13.36	-9.75	-3.45	3.87
Zone 2 - Putney	0.00	-2.49	-1.26	2.24	6.84
Zone 3 - Roehampton	0.00	0.09	0.16	0.35	0.60
Zone 4 - Tooting	0.00	-4.97	-2.41	3.01	9.42
Zone 5 - Balham	0.00	-6.14	-4.26	-0.02	4.11
Zone 6 - Clapham Junction	0.00	-10.12	-6.98	-3.02	1.58
Zone 7 - VNEB/Clapham	0.00	-9.71	-1.28	9.38	20.15
Total	0.00	-46.70	-25.78	8.51	46.56

Source: Tables 5 to 12

Table 14: Food and beverage floorspace capacity

	2020	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£6,000	£6,306	£6,628	£6,966	£7,321
Floorspace capacity (sq.m gross)					
Zone 1 - Wandsworth	n/a	-2,119	-1,471	-495	529
Zone 2 - Putney	n/a	-395	-190	322	934
Zone 3 - Roehampton	n/a	14	24	50	82
Zone 4 - Tooting	n/a	-789	-364	433	1,286
Zone 5 - Balham	n/a	-974	-643	-2	561
Zone 6 - Clapham Junction	n/a	-1,604	-1,053	-433	216
Zone 7 - VNEB/Clapham	n/a	-1,539	-193	1,347	2,752
Total	n/a	-7,406	-3,890	1,221	6,360

Appendix 8 Stakeholder contacts

Balham town centre

Sam Ubhi
Samuel Estates
Natural for Baby
Petals of Balham

Clapham Junction town centre

Battersea Arts Centre
Anthony Laban Barber Shop
Clapham Grand
ShopStop

Putney town centre

Sporting Feet
Adornments
Robert Dyas
Putney Exchange Shopping Centre

Tooting town centre

Scanito Jeans Ltd
Tooting Market
Morleys
Specsavers
Trident Business Centre

Wandsworth town centre

Brewers Inn
Bailey & Sage
Southside Shopping Centre

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