Town Centre Monitoring Report 2023

Planning

October 2024

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1. Summary

Surveys of all the Town Centres, Local Centres, and Important Local Parades have been carried out in the Borough of Wandsworth since 1988. They cover approximately 2,500 properties and the last survey was carried out in 2022.

The following report shows that the boroughwide vacancy rate has decreased from 12.4% in 2022 to 11.1% in 2023. The overall Town Centre vacancy rate has also decreased slightly from 10.7% to 10.2%, although the individual circumstances of each Town Centre vary. For example, Wandsworth Town Centre recorded a vacancy rate of 17% in 2023 compared to 23% in 2022, and Tooting recorded a vacancy rate of 8% compared to 7% in 2022. The vacancy rates of Local Centres and Important Local Parades also declined by 2% and 4%, respectively.

2. Introduction

1. This report summarises the results of the town centre land use survey conducted in the borough between 23rd October and 24th November 2023 which covered all retail premises in designated shopping frontages.
2. The information is broken down into Core Shopping frontages, Secondary Shopping frontages, Protected Other frontages, and Important Local Parades. This format enables the role of each shopping frontage to be monitored. Given their local role and catchments, retail uses in the Local Centres would be expected to concentrate on convenience (food) shopping, with comparison (durable/non-food) shopping being concentrated in the town centres. The survey includes all businesses in designated shopping frontages in the borough.

   - Protected Core Shopping frontages are defined in the Council's Local Plan policies as being key areas in terms of shopping function, containing a high proportion of retail uses;
   - Protected Secondary Shopping frontages are defined as playing an important complementary shopping role, containing a mix of retail, non-retail and other services appropriate to a shopping frontage;
   - Protected Other frontages are defined as playing a complementary shopping role - these frontages also contain a range of town centre uses.
   - Important Local Parades have a key role in contributing to sustainable development, providing access to day-to-day necessities, such as food, newsagents, pharmacies, and post offices, within walking distance from home.

3. The new local plan introduced three newly designated Important Local Parades at Battersea Square, Old York Road, and Webb's Road. A number of changes were also made to the town and local centre frontage designations[1]. The Local Plan also identified Battersea Power Station as an emerging Town Centre.

4. Following the introduction of the combined planning use class in 2020, for the purposes of this report premises were classified into seven broad retail categories.

[1] https://www.wandsworth.gov.uk/media/10137/policy_map_changes.pdf

2.1. Structural changes to retailing

1. There are well-documented changes to the retail sector resulting from growth in multichannel retailing, primarily internet shopping, which has resulted in debate about the amount of shopping needed in the High Street. The most recent research suggests[2] that, over the longer-term, there will be demand for additional retail and leisure floorspace, although it is noted that this research was carried out prior to the pandemic. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to influence retailing in the high street and from traditional stores.

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

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

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

2.2. Changes to permitted development rights

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

Table 1: Changes to permitted development rights

Came into force in May 2013	change to a flexible use (A1, A2, A3 or B1 Use Classes) from A1, A2, A3, A4, or A5 for a temporary period of up to 2 years. Some exemptions but no prior approval process.
	change from B1 office to residential. Initially this change was temporary until 30th May 2016 but was subsequently made permanent in April 2016[3]. Some exemptions and limited prior approval process.
Came into force in April 2014	change of use and some associated physical works from a small shop or provider of professional/financial services (A1 and A2 uses) to residential use (C3). Some exemptions and prior approval process.
	retail to banks and building societies (deposit-takers) - allows change of use from a shop (A1) to a bank or a building society. No prior approval process and few exemptions.
Came into force in April 2015	change of use from shops (A1) to financial and professional services (A2). There is no prior approval process and no exemptions.
Came into force in April 2017	changes to permitted development rights to allow change of use from shops (A1 Use Class) to financial services (A2 Use Class). The Council has made an Article 4 Direction to restrict this change in various centres across the borough.
Came into force in September 2020[4]	extending some temporary permitted development rights; takeaway food operations from restaurants, cafes and drinking establishments, and some emergency development rights. Streamlining the existing 16 Use Classes into 11 by introducing three new broad Use Classes. The significant change being the introduction of the combined commercial class, (See also Section below for more detail.) • **Class E** - subsuming the existing A1, A2, A3, B1 (including R&D) and selected D1 and D2 Use Classes which includes retail, food, financial services, indoor sport and fitness, medical or health services, nurseries, offices and light industry. Class E will also include 'other services which it is appropriate to provide in a commercial, business or service locality'. This is expected to comprise uses such as travel agents and post offices which were previously classified within Class A1. • **Class F1 -** A new Learning and Non-Residential Institutions Use Class, known as F1, embraces the remaining parts of the existing D1 Use Classes that are not included within the new Class E. This will include education, non-commercial galleries, law courts, libraries, museums, places of worship and public halls. • **Class F2 -** A new Local Community Use Class, known as F2, will comprises part of the current A1 and D2 Use Classes and includes small corner shops*, local community halls, outdoor recreational areas, and swimming pools. * meeting criteria which means that this protection is unlikely to be applicable in this borough Drinking establishments are categorised as sui generis. For any reference to Permitted Development rights, and for restrictions to them or applications for Prior Approval, the Use Classes in effect prior to 1 September 2020 will be used until the end of July 2021.

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

[3] The Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2016 introduced other changes including launderettes being included in Class M- retail and specified sui generis uses to dwelling houses.
[4] https://www.gov.uk/guidance/ensuring-the-vitality-of-town-centres

2.3. Introduction of combined business class

Class E (Commercial, business and service)

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

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

Table 2. Class E (Commercial, business and service)

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

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

Class E more broadly covers uses previously defined in the revoked Classes A1/2/3, B1, D1(a-b) and 'indoor sport' from D2(e):[5]

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

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

Since this change in legislation an Article 4 Direction (as modified by the Secretary of State) came into force on 29th July 2022 to remove permitted development rights regarding the change of use from class E use to C3 use (dwellinghouses).[6] The effect of the Direction means that a change of use from a commercial, business and service use to residential in certain locations would require planning permission and will be assessed against Local Plan policies. The Article 4 direction covers 62 areas across the borough where the main concentrations of commercial and business uses are located, including areas within centres and parades of all sizes.

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

3. Methodology

1. Survey results have historically been reported using the former use class order, however following the amalgamation of use classes in September 2020, this report builds on the methodology used in previous reports of a broader classification of the type of retail use into Convenience, Durables and Service categories. Details of the predominant uses in each Retail Category are described in Appendix 1.

2. The predominant use in some units may be unclear, however this overall classification allows comparison of the structure of overall uses in each area. For example, a Post Office may be categorised as a service retailer if it provides mainly postal services, but as a convenience retailer if it incorporates a majority of floorspace as a newsagent and stationery.

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

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

5. Vacant units were recorded where a judgement was made that they were not trading on the day of the site survey which was confirmed where possible with additional research.

6. Units being refurbished are included in the vacancy count. In a small number of instances where it is advertised on-site that the existing/new business will be opening in the very near future, the premises will be recorded as occupied.

7. The survey collects information on all ground floor units within the protected shopping frontages. Details of the occupier, use and use class were collected enabling changes in the number of units and use class to be monitored over time. The boundaries used in this report include all the shopping frontages detailed in the Council's recently adopted Local Plan, 2023.

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

4. Summary of Vacancies

The overall number of vacant units recorded in the borough has decreased by 24 since 2022 with 265 vacant units recorded in 2023. The overall vacancy rate in all frontages has decreased to 11.1% in 2023 from 12.4% in 2022.

Table 3. Boroughwide - Vacant Units by year (All frontages)

	2006	2008	2010	2012	2014	2016	2018	2020*	2021*	2022	2023	Average
Total Units	2354	2308	2328	2322	2280	2300	2308	2120	2160	2329	2378	2290
Vacant Units	170	217	218	211	177	188	251	279	261	289	265	230
Vacancy Rate	7.2%	9.4%	9.4%	9.1%	7.8%	8.2%	10.9%	13.2%	12.1%	12.4%	11.1%	10.1%

The number of units surveyed in 2020 and 2021 was reduced due to the Covid pandemic

Figure 1. Vacancy Rate - Wandsworth Borough (All frontages)

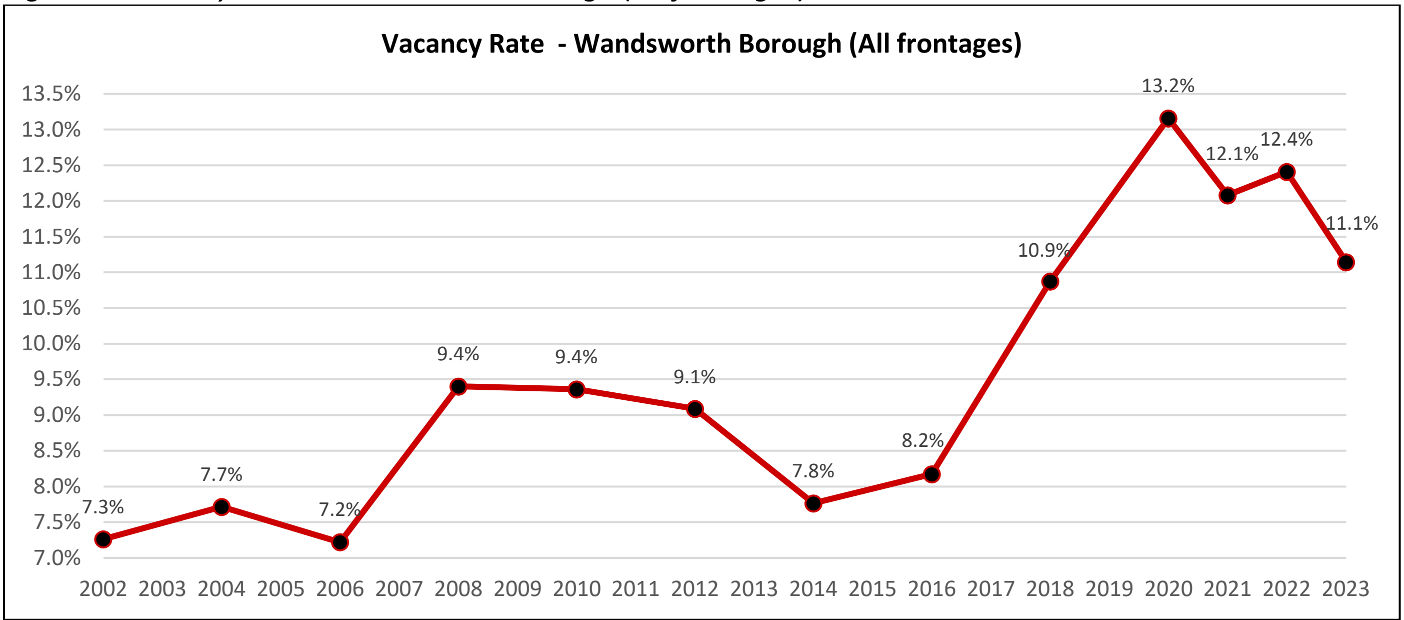


Table 4. Town Centres - Vacant Units by year (All frontages)

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	1453	1445	1462	1464	1413	1435	1443	1406	1304	1442	1441	1428
Vacant Units	84	118	123	120	80	110	131	182	139	155	146	126
Vacancy Rate	5.8%	8.2%	8.4%	8.2%	5.7%	7.7%	9.1%	12.9%	10.7%	10.7%	10.1%	8.9%

Table 5. Local Centres - Vacant Units by year (All frontages)

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	559	555	562	553	546	561	562	528	556	558	561	556
Vacant Units	52	61	58	62	59	43	70	68	76	84	72	63
Vacancy Rate	9.3%	11.0%	10.3%	11.2%	10.8%	7.7%	12.5%	12.9%	13.7%	15.1%	12.8%	11.3%

Table 6. Important Local Parades - Vacant Units by year (All frontages)

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	342	308	304	305	321	304	303	186	300	301	379	308
Vacant Units	34	38	37	29	38	35	50	29	46	50	47	39
Vacancy Rate	9.9%	12.3%	12.2%	9.5%	11.8%	11.5%	16.5%	15.6%	15.3%	16.6%	12.4%	12.7%

5. Retail Categories by Frontage

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

Table 7. Percentage of units in protected frontages by retail category

Retail Category	Core	Secondary	Other	Important Local Parade	All
Food and Leisure	15%	23%	27%	19%	23%
Services	16%	20%	18%	20%	18%
Durable/Non-food	32%	19%	13%	10%	17%
Convenience Retailer	16%	13%	10%	19%	13%
Financial and Business	7%	10%	10%	11%	9%
Public Service/Facilities	3%	3%	7%	7%	5%
Pubs and Bars	1%	3%	4%	1%	3%
Closed/Vacant	10%	9%	12%	13%	11%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Figure 2. Percentage of trading units in protected frontages by retail category

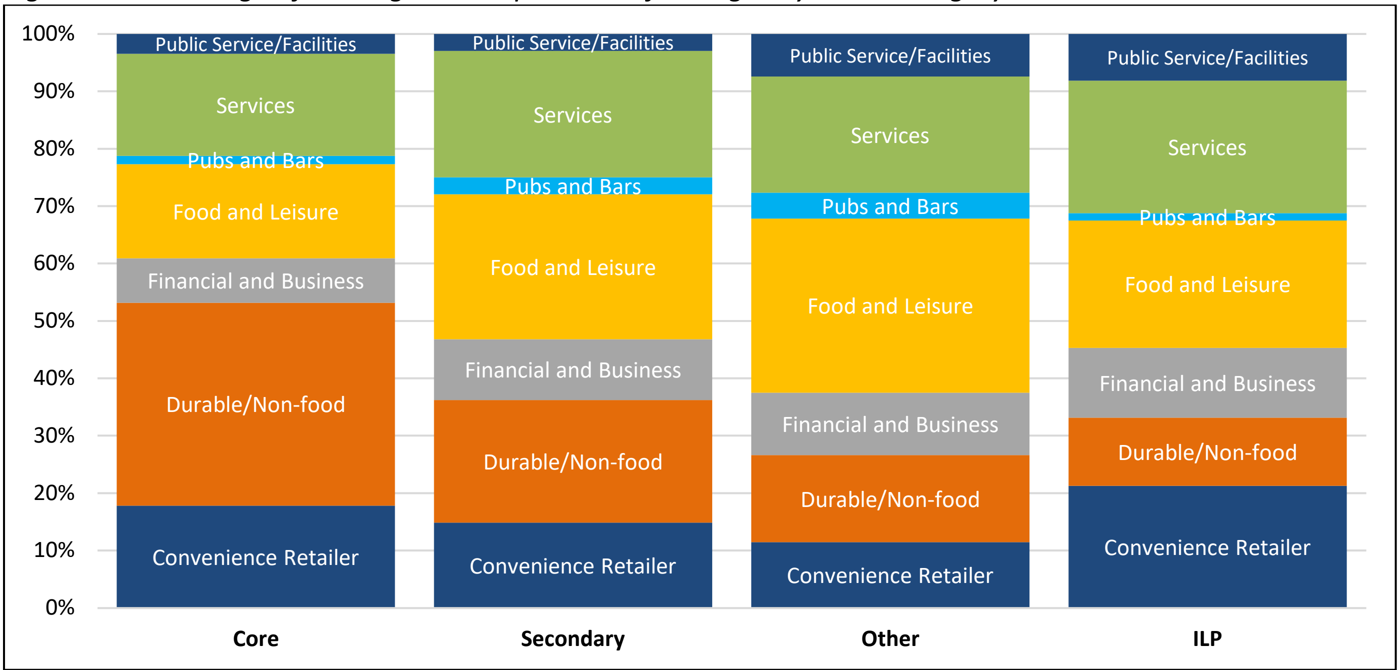


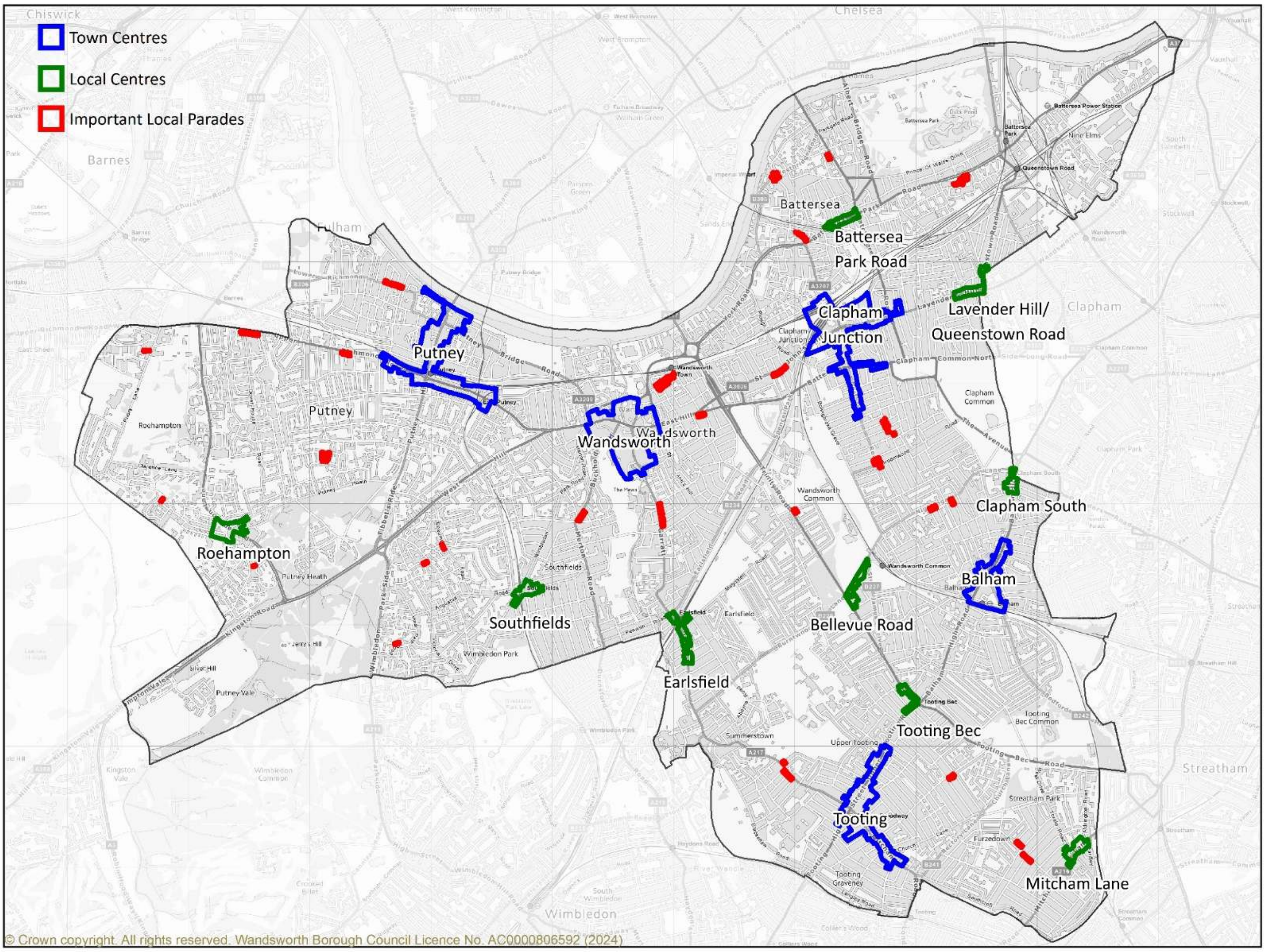
Table 8. Change in Percentage of trading units in protected frontages by retail category – 2022 to 2023

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	0.0%	-0.3%	0.0%	3.7%	0.3%	1.0%	0.1%
Secondary	-0.6%	-0.6%	0.6%	0.8%	-0.3%	0.0%	-0.3%
Other	0.1%	-0.7%	-0.4%	0.7%	0.0%	-0.2%	0.5%
ILP	-1.5%	2.4%	0.6%	1.3%	0.1%	0.2%	1.1%
Total	0.1%	-0.8%	-0.7%	1.7%	-0.2%	0.3%	0.2%

6. Town Centres

The adopted Local Plan sets out how the borough's centres are positioned within a hierarchy: there are 5 town centres (Balham, Clapham Junction, Putney, Tooting, and Wandsworth), nine local centres, and 26 Important Local Parades. Within the town and local centres, particular areas of the centres are designated as Core Shopping frontages, Secondary Shopping Frontages, and Protected Other frontages. The spatial arrangement of the hierarchy of centres is displayed in the map below, and further information on the location of the individual frontages can be found in section 19 of the Local Plan[7].

Figure 3. Hierarchy of centres



7 https://www.wandsworth.gov.uk/media/large/adopted_local_plan.pdf

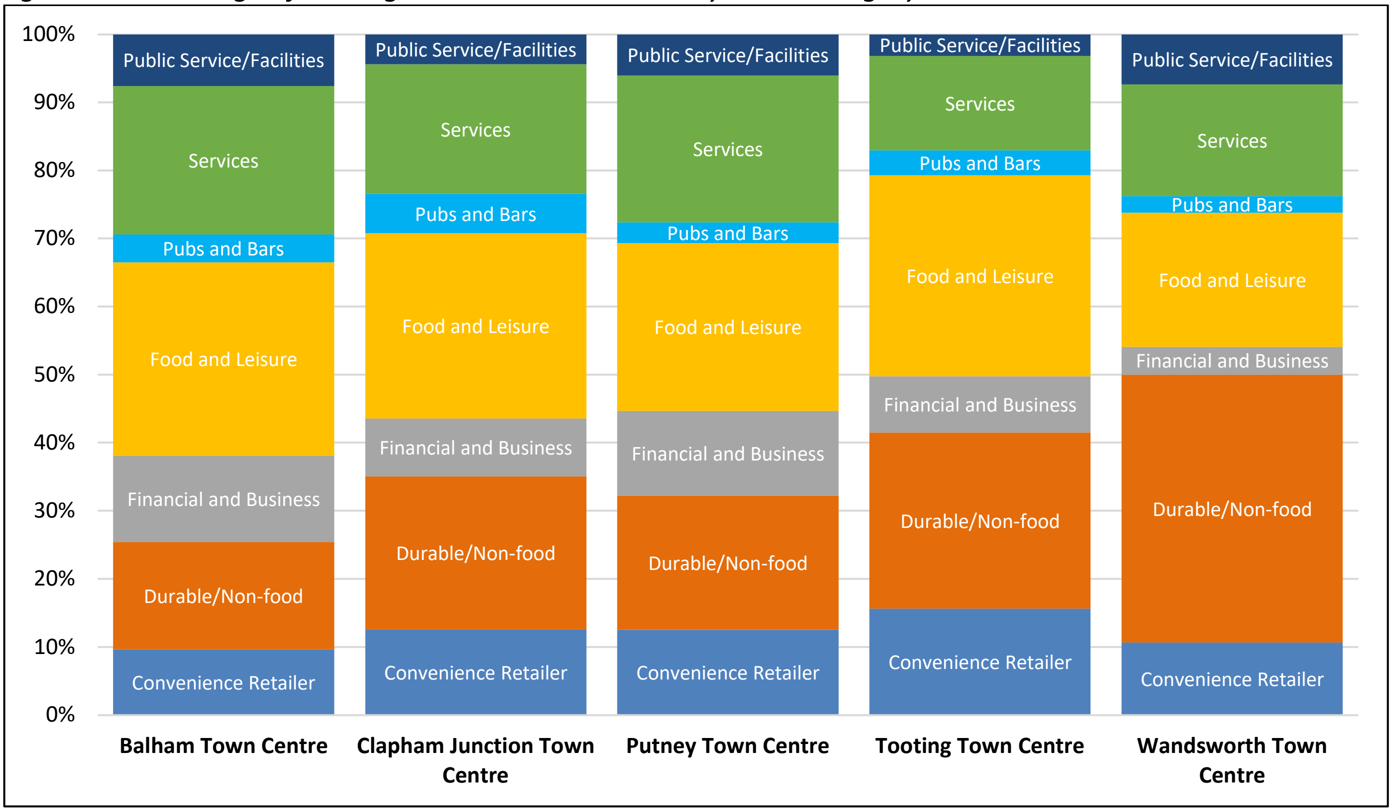
7. Town Centre - Retail Categories

Table 9 below show the percentage of all units in the retail categories that are in each Town Centre as a proportion of that category. This allows comparison of the categories between Town Centres, and shows for example, that Balham and Putney have a high proportion of Financial and Business units compared to other Town Centres, Clapham Junction has a higher proportion of Pubs and Bars, and Wandsworth a high proportion of Durable/Non-food businesses. The differences in structure of uses in each Town Centre illustrates the market forces, character, and demographic of each area. It is also important to consider the influences of the large indoor shopping centres in Putney and Wandsworth and two large indoor markets in Tooting.

Table 9. Percentage of trading units in Town Centres by retail category

Town Centre	Convenience Retailer	Durable/ Non-food	Financial & Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Balham	10%	16%	13%	28%	4%	22%	8%
Clapham Junction	13%	22%	9%	27%	6%	19%	4%
Putney	13%	20%	13%	25%	3%	22%	6%
Tooting	16%	26%	8%	30%	4%	14%	3%
Wandsworth	11%	39%	4%	20%	2%	16%	7%
Total	13%	24%	9%	27%	4%	18%	5%

Figure 4. Percentage of trading units in Town Centres by retail category



8. Changes in Retail Categories between 2022 - 2023

There have been minor changes in comparison with the retail categories recorded in 2022 as the table below illustrates. There was a notable increase in Food and Leisure Retailers with Balham and Putney both having a 2.9% increase. Clapham Junction however saw a 2% increase in Durable/Non-food retailers. Financial and Business uses saw a decline in all town centres, and other categories saw mixed results with both increases and decreases, varying by town centre.

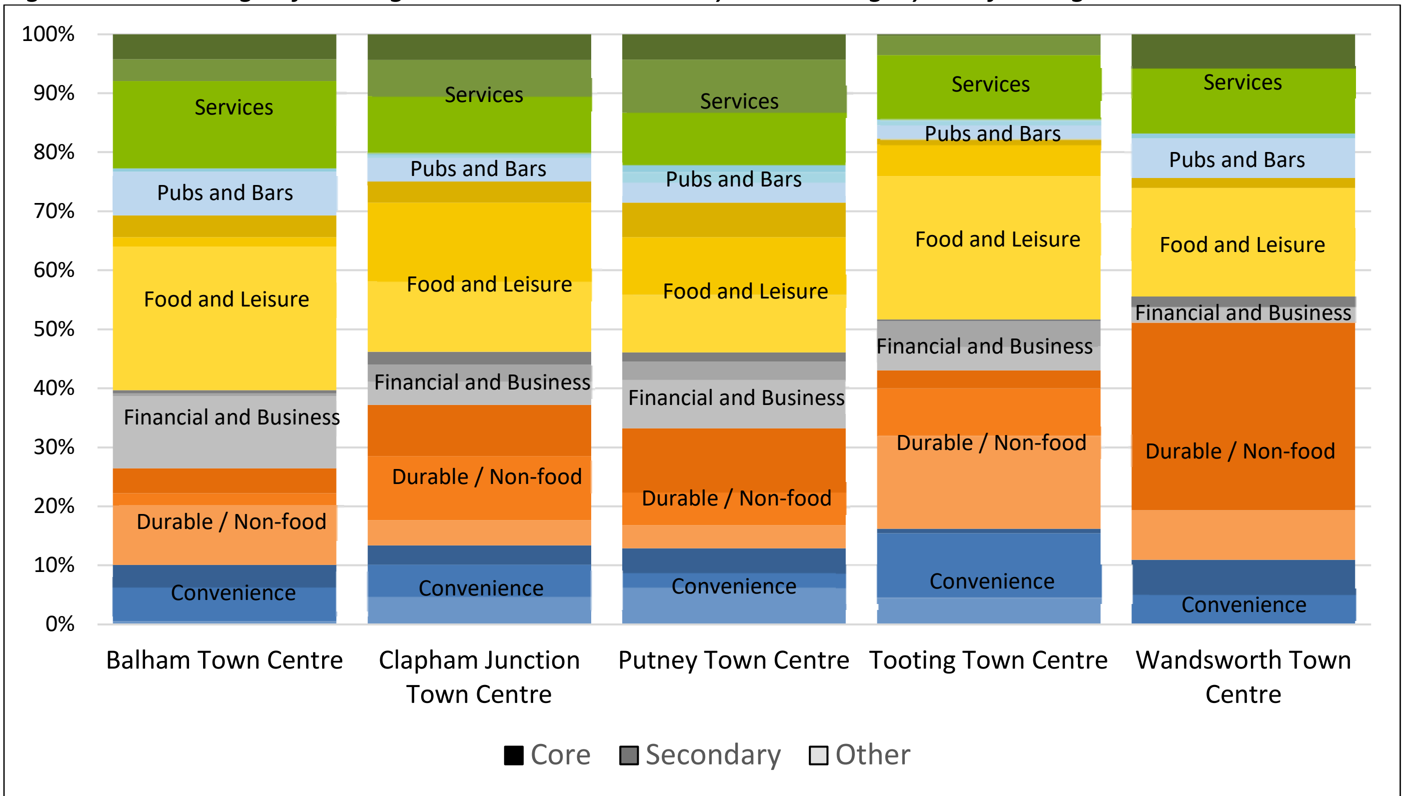
Table 10. Change in Percentage of trading units in Town Centres by retail category – 2023 compared to 2022

Town Centre	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Balham	-0.8%	-0.9%	-1.4%	2.9%	-0.1%	0.0%	0.3%
Clapham Junction	2.0%	-1.5%	-0.5%	0.6%	-0.5%	0.1%	-0.2%
Putney	-0.9%	0.2%	-2.4%	2.9%	-0.4%	-0.2%	0.7%
Tooting	-0.2%	-0.7%	-0.5%	2.0%	-0.2%	-0.7%	0.3%
Wandsworth	-1.6%	-1.9%	-0.3%	2.1%	0.7%	0.6%	0.4%
Total	-0.1%	-0.8%	-1.0%	2.0%	-0.3%	-0.2%	0.3%

9. Town Centre retail categories by frontage

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

Figure 5. Percentage of trading units in Town Centres by retail category and frontage



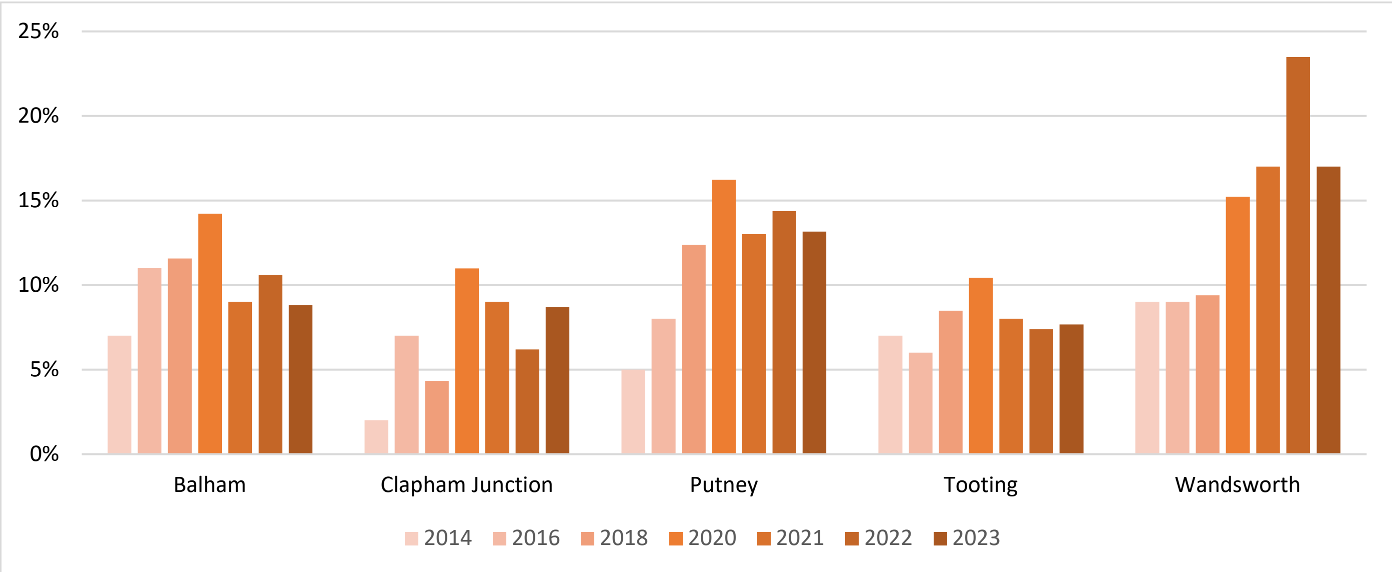
10. Town Centres – Summary of Vacancies

Table 14 and the chart below show the change in the percentage of vacant units in each of the Town Centres between 2016 and 2023. These are described in greater detail in the individual Town Centre sections of this report, but they show that vacancy rates have decreased in Balham, Putney, and Wandsworth with minor increases in Clapham Junction and Tooting.

Table 11. Number of Units and Percentage of Vacant Units by Town Centre (2016 - 2023)

Town Centre	2016		2018		2020		2021		2022		2023	
	No Units	% Vacant	No Units	% Vacant	No Units	% Vacant	No Units	% Vacant	No Units	% Vacant	No Units	% Vacant
Balham	214	11%	216	12%	217	14%	218	9%	217	11%	216	9%
Clapham Jctn	322	7%	324	4%	328	11%	326	9%	323	6%	322	9%
Putney	306	8%	307	12%	308	16%	306	13%	306	14%	304	13%
Tooting	450	6%	448	8%	403	10%	309	8%	447	7%	444	8%
Wandsworth	143	9%	149	9%	151	15%	148	17%	149	23%	147	17%
Total	1,435	8%	1,443	9%	1,407	13%	1,307	11%	1,442	11%	1,433	10%

Figure 6. Percentage of Vacant Units by Town Centre (2014 - 2023)



11. Change in Vacant Units - 2022 – 2023

Units may become vacant for various reasons such as a change in ownership, a drop in trade, or a move to a larger or smaller unit for economic reasons. Units may also have been recorded as vacant both in 2022 and 2023 but may have been occupied by a successful business in the intervening period.

Across the five Town Centres a total of 146 units were recorded as closed/vacant in 2023 including 11 that were under construction. Out of these, 91 were also recorded as closed/vacant in 2022. Of the 155 vacant units the largest proportion of previous uses in 2022 were 20 Durable/Non-Food units, 12 Financial and Business units and 7 Food and Leisure units.

12. Town Centres – Vacancies by Frontage

The town centres vary in size and have largely retained their level of retail use and low vacancy rates. The total number of units across all the protected frontages shows little change over the longer term. The overall vacancy rate in 2023 has decreased marginally since 2022 from 10.7% to 10.2%. The vacancy rates across Core frontages have decreased significantly from 12% to 9%. Secondary frontages are stable around the average and Other frontages continue to be above average.

Table 12. Vacant Units by year - Town Centres (All frontages)

	2006	2008	2010	2012	2014	2016	2018	2020*	2021*	2022	2023	Average
Total Units	1453	1445	1462	1464	1413	1435	1443	1406	1306	1442	1433	1428
Vacant Units	84	118	123	120	80	110	131	183	139	155	146	126
Vacancy Rate	6%	8%	8%	8%	6%	8%	9%	13%	11%	11%	10%	9%

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

Figure 7. Vacant Units by year - Town Centres (All frontages)

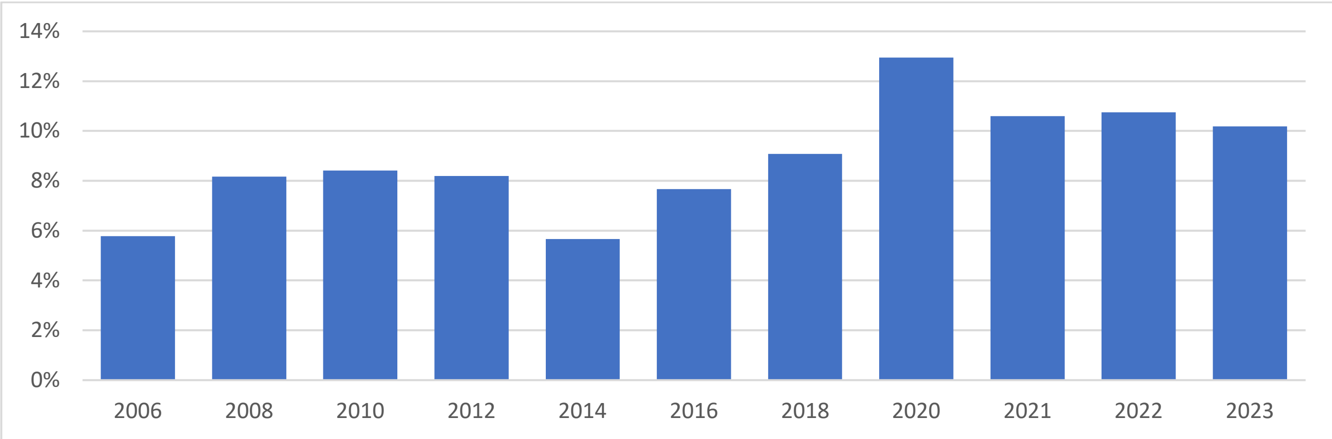


Table 13. Vacant Units by year - Town Centres (Core frontages)

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	276	275	307	308	282	278	277	279	275	275	273	283
Vacant Units	7	14	36	41	15	18	29	36	31	32	25	26
Vacancy Rate	3%	5%	12%	13%	5%	6%	10%	13%	11%	12%	9%	9.1%

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

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	371	367	373	351	337	357	354	359	354	354	354	360
Vacant Units	28	26	29	18	12	24	26	42	32	24	28	27
Vacancy Rate	8%	7%	8%	5%	4%	7%	7%	12%	9%	7%	8%	7.4%

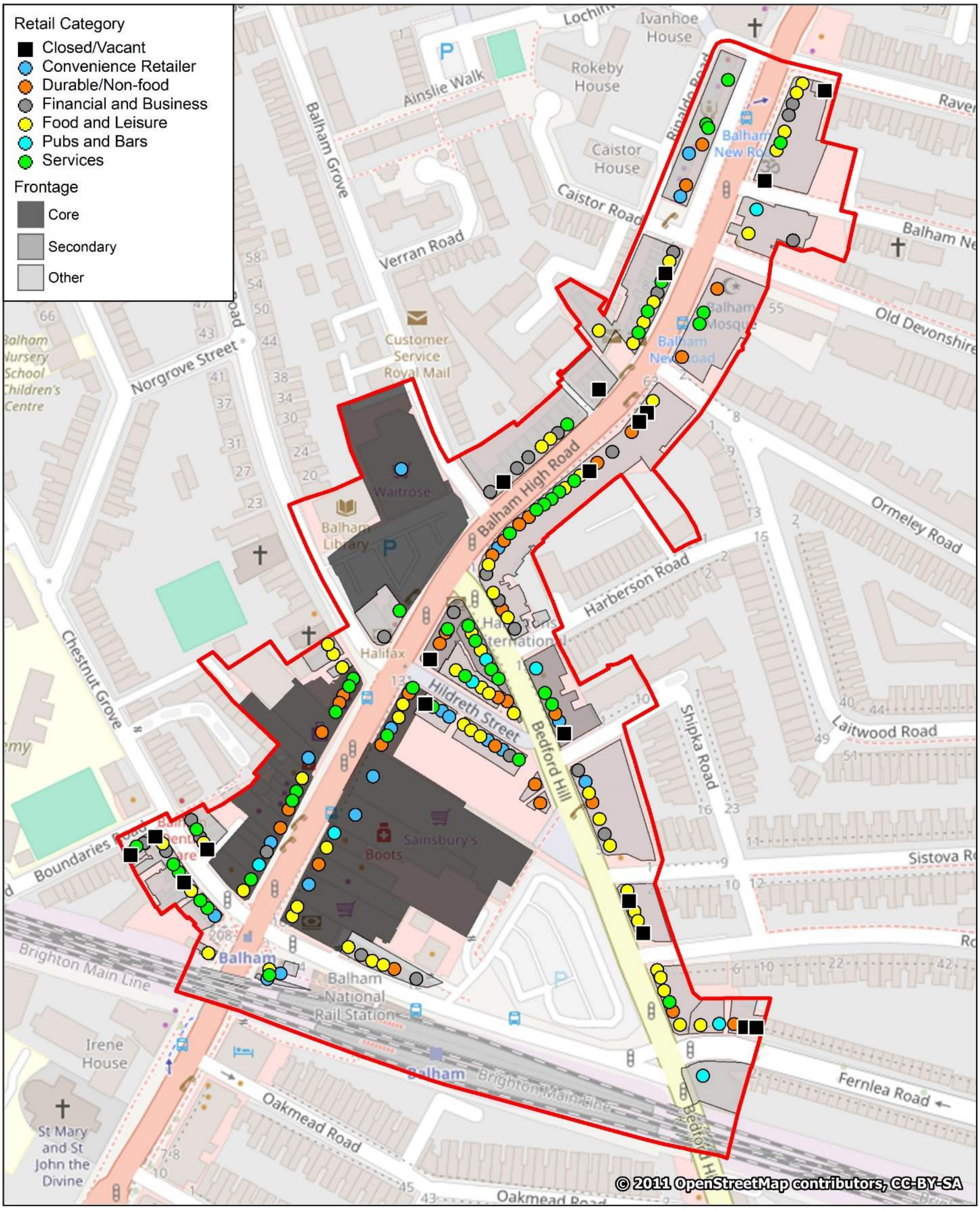
Table 15. Vacant Units by year - Town Centres (Other frontages)

	2006	2008	2010	2012	2014	2016	2018	2020*	2021*	2022	2023	Average
Total Units	806	803	782	805	794	800	812	768	677	806	806	785
Vacant Units	49	78	58	61	53	68	76	104	76	99	93	72
Vacancy Rate	6%	10%	7%	8%	7%	9%	9%	14%	11%	12%	12%	9.2%

13. Balham Town Centre - Headline results

The combined vacancy rate in Balham Town Centre (all frontages) has decreased from 11% in 2022 to 9% in 2023. There were no vacant units in the core frontages; secondary frontages saw no change with 2 vacant units; and other frontages saw a small decrease from 12% to 10%.

Figure 8. Balham Town Centre



14. Balham Town Centre – Vacancies by Frontage

- There were 19 vacant/closed units in Balham Town Centre of which 5 were newly vacant (including 3 units previously recorded as Financial and Business and 2 recorded Durable/Non-food).
- 14 units recorded as vacant/closed in 2022 were again recorded as vacant/closed in 2023.
- Most vacant units were in Other protected frontages, including 7 at Balham High Road and 3 at Chestnut Grove.

Table 16. Vacant Units by year (All designated frontages) – Balham Town Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	217	214	214	212	209	214	216	218	218	215	216	215
Vacant Units	18	16	17	16	14	23	25	31	20	23	19	20
Vacancy Rate	8%	7%	8%	8%	7%	11%	12%	14%	9%	11%	9%	9.5%

Figure 9. Vacant Units by year (All designated frontages) – Balham Town Centre

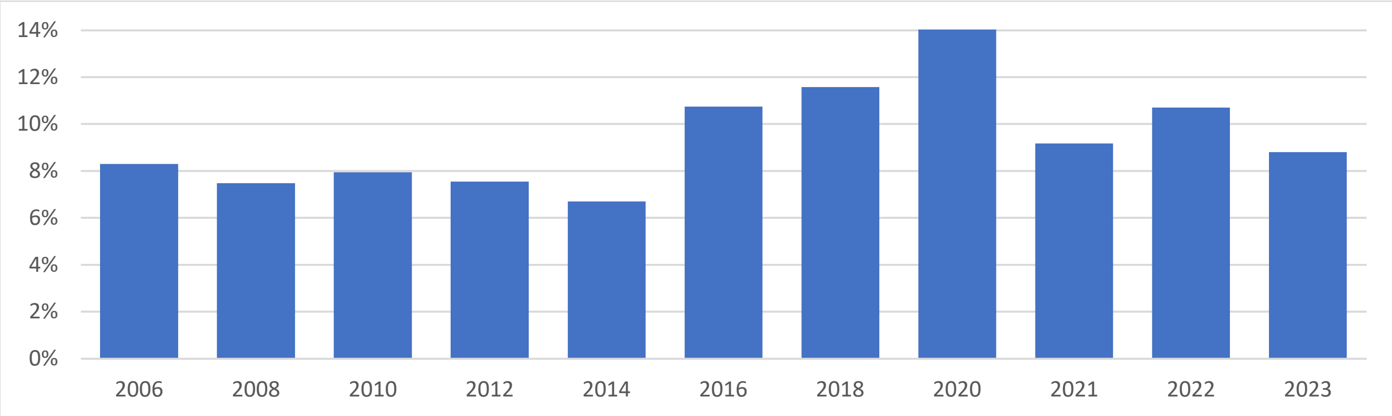


Table 17. Vacant Units by Year (Core frontages) - Balham Town Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	33	33	33	34	33	33	33	33	33	33	34	33
Vacant Units	1	0	1	2	2	1	4	4	2	2	0	2
Vacancy Rate	3%	0%	3%	6%	6%	3%	12%	12%	6%	6%	0%	6%

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

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	67	67	38	38	21	20	20	20	20	20	20	36
Vacant Units	4	4	4	3	0	0	0	2	2	2	2	3
Vacancy Rate	6%	6%	11%	8%	0%	0%	0%	10%	10%	10%	10%	7%

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

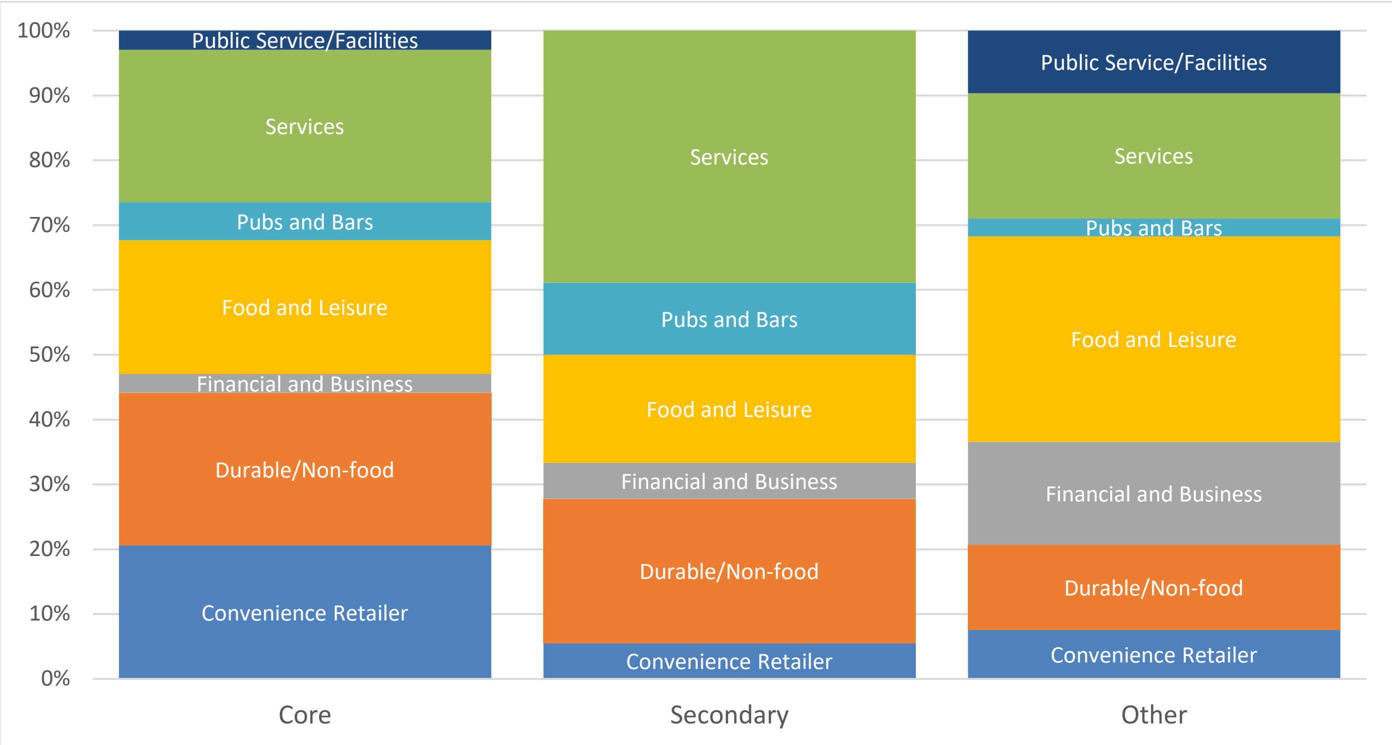
	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	117	114	143	140	155	161	163	165	165	162	162	146
Vacant Units	13	12	12	11	12	23	21	25	16	19	17	16
Vacancy Rate	11%	11%	8%	8%	8%	14%	13%	15%	10%	12%	10%	11%

15. Balham Town Centre – Retail Categories

Table 20. Percentage of trading units by retail category and frontage - Balham Town Centre

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	21%	24%	*3%*	21%	6%	24%	3%
Secondary	6%	22%	*6%*	17%	11%	39%	0%
Other	8%	13%	16%	32%	3%	19%	10%
Total	**10%**	**16%**	**13%**	**28%**	**4%**	**22%**	**8%**

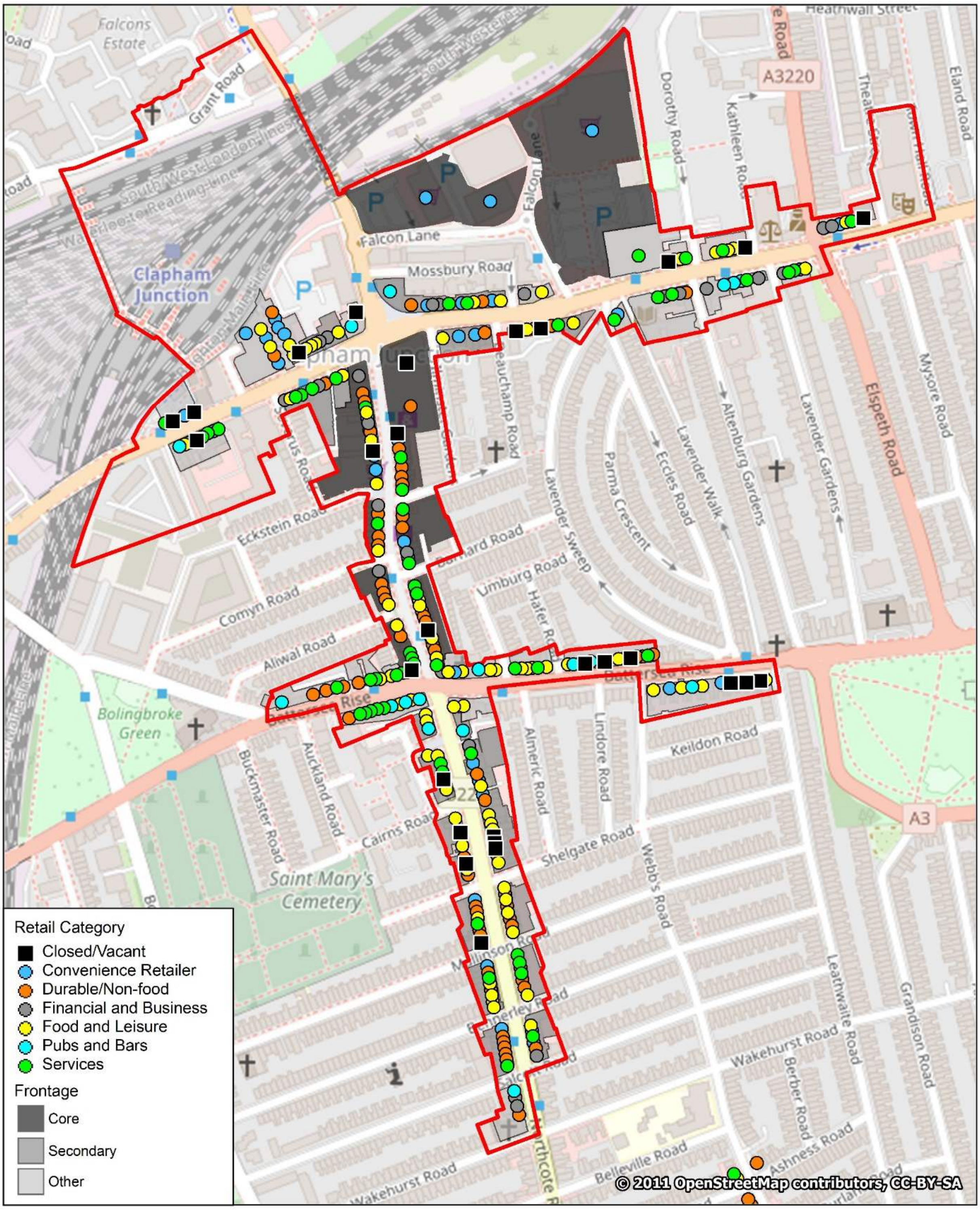
Figure 10. Percentage of trading units by retail category and frontage - Balham Town Centre



16. Clapham Junction Town Centre - Headline results

The vacancy rate in Clapham Junction Town Centre (all frontages) increased from 6% in 2022 to 9% in 2023. Core frontages saw in increase of 1 vacant unit compared to 2022 and Secondary frontages saw an increase of 5 vacant units resulting in an 8% vacancy rate, whilst Other frontages saw a 2% increase.

Figure 11. Clapham Junction Town Centre



17. Clapham Junction Town Centre – Vacancies by Frontage

- In 2023 there were 28 vacant units in Clapham Junction Town Centre, which is an increase on the 20 vacancies recorded in 2022.
- 15 of these 28 units were newly vacant, including 5 durable/non-food and 3 Food and Leisure units.
- 13 of the vacant units were also recorded as vacant in the 2022 survey, and 7 units have remained vacant since the 2021 survey.
- Northcote Road had the most vacant units (7), followed by Battersea Rise and Lavender Hill (6).

Table 21. Vacant Units by year (All designated frontages) - Clapham Junction Town Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	335	333	334	334	323	322	324	328	325	321	322	328
Vacant Units	10	11	10	14	6	21	17	36	30	20	28	18
Vacancy Rate	3%	3%	3%	4%	2%	7%	5%	11%	9%	6%	9%	5%

Figure 12. Vacant Units by year (All designated frontages) - Clapham Junction Town Centre

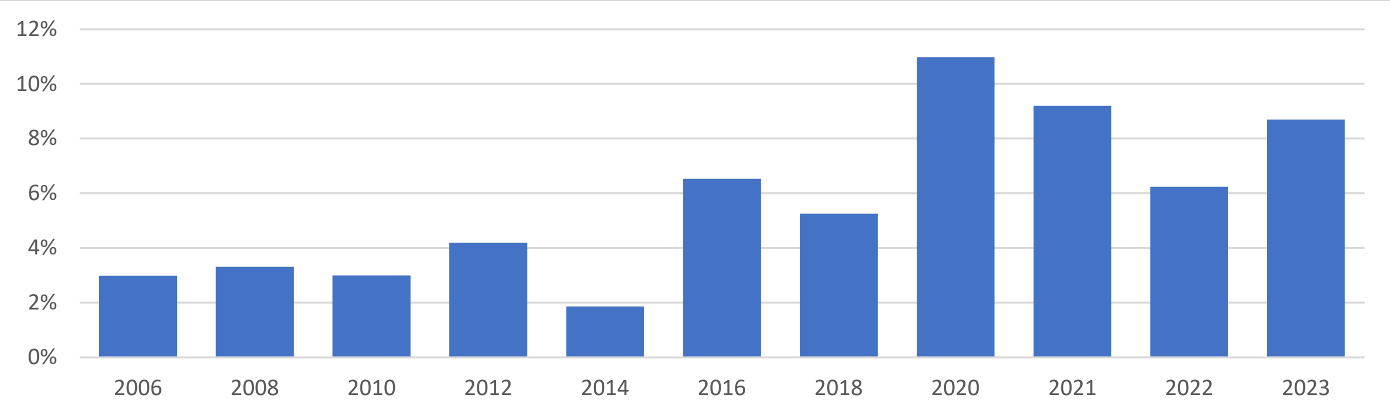


Table 22. Vacant Units by year (Core frontages) - Clapham Junction Town Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	69	69	69	69	69	68	68	69	68	67	67	68
Vacant Units	0	3	1	3	1	5	6	6	5	4	5	4
Vacancy Rate	0%	4%	1%	4%	1%	7%	9%	9%	7%	6%	7%	5%

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

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	77	76	93	93	100	116	117	119	119	119	119	104
Vacant Units	5	3	4	4	0	9	7	14	13	5	10	7
Vacancy Rate	6%	4%	4%	4%	0%	8%	6%	12%	11%	4%	8%	6%

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

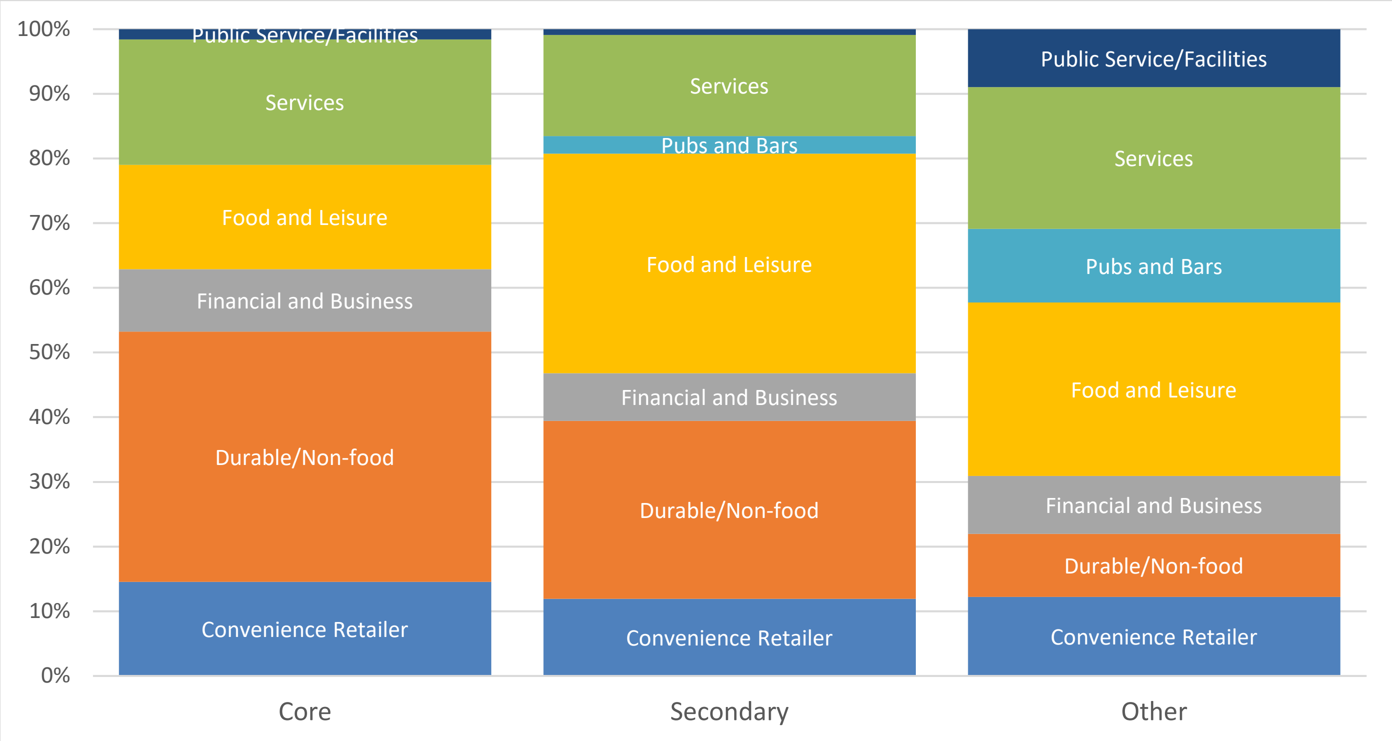
	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	189	188	172	172	154	138	139	140	138	135	136	155
Vacant Units	5	5	5	7	5	7	4	16	12	11	13	8
Vacancy Rate	3%	3%	3%	4%	3%	5%	3%	11%	9%	8%	10%	5%

18. Clapham Junction Town Centre - Retail Categories

Table 25. Percentage of trading units by retail category and frontage - Clapham Junction Town Centre

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	15%	39%	10%	16%	0%	19%	2%
Secondary	12%	28%	7%	34%	3%	16%	1%
Other	12%	10%	9%	27%	11%	22%	9%
Total	**13%**	**22%**	**9%**	**27%**	**6%**	**19%**	**4%**

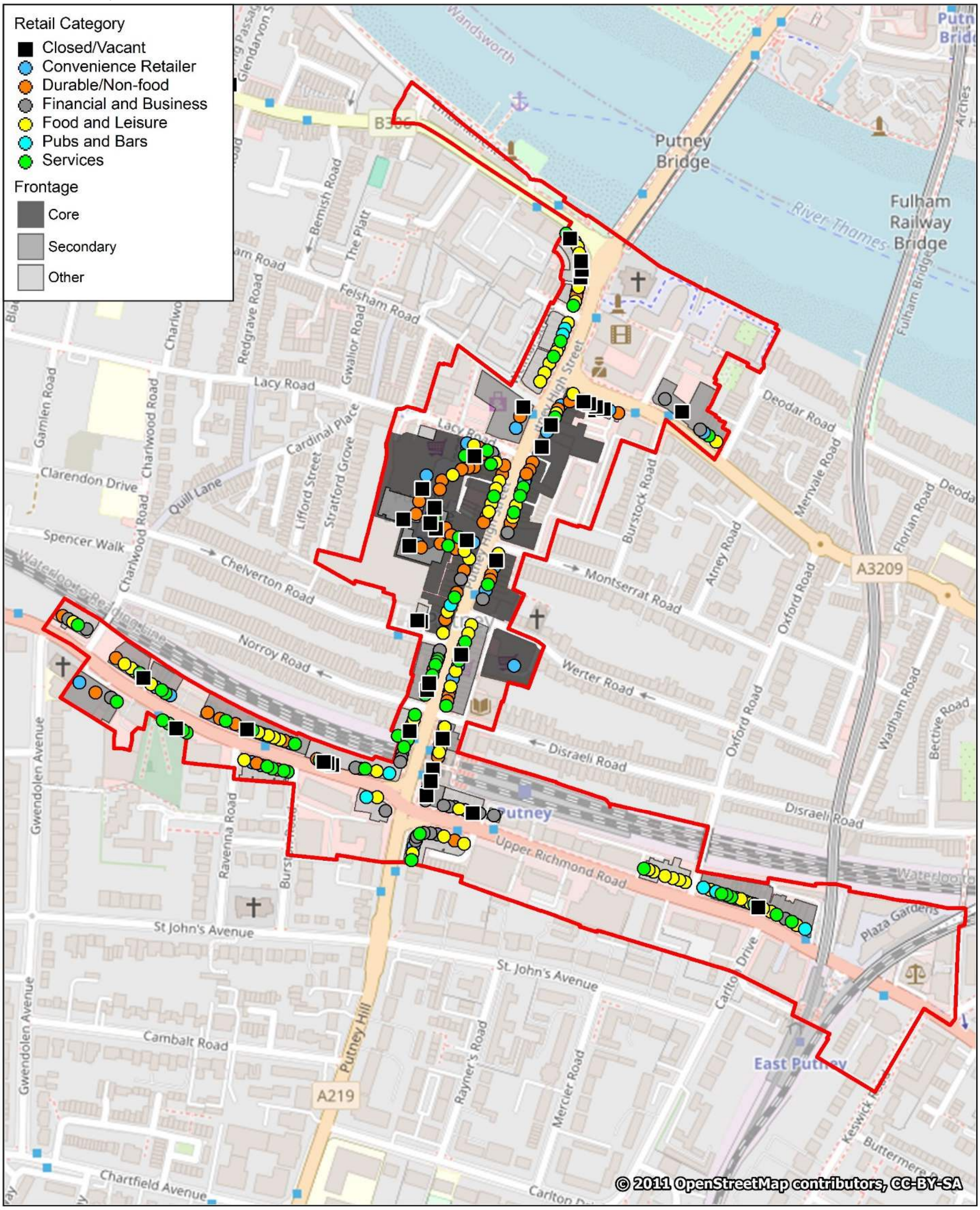
Figure 13. Percentage of trading units by retail category and frontage - Clapham Junction Town Centre



19. Putney Town Centre – Headline Results

In 2023, 40 units were recorded as closed/vacant across all frontages in Putney Town Centre (a vacancy rate of 13%), which is a slight decrease on the 44 vacancies in 2022. The majority of vacant units were on Putney High Street (22) and Upper Richmond Road (8).

Figure 14. Putney Town Centre



20. Putney Town Centre – Vacancies by Frontage

- Core frontages saw a significant decrease in the vacancy rate from 19% to 11%, whilst Other frontages saw a large increase from 13% in 2022 to 16% in 2023.
- 16 of the 40 vacant units in 2023 were newly vacant, including 5 Durable/Non-food units and 4 Financial and Business units.
- 24 units recorded as closed/vacant in 2022 remained unoccupied in 2023, with 10 of these units also being recorded as vacant in 2021. Putney High Street had 23 vacant units (including 8 in Putney Exchange) and Upper Richmond Road had 8 vacant units.

Table 26. Vacant Units by year (All designated frontages) - Putney Town Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	315	312	315	315	307	306	307	308	306	306	304	309
Vacant Units	13	15	21	22	15	26	38	50	40	44	40	29
Vacancy Rate	4%	5%	7%	7%	5%	8%	12%	16%	13%	14%	13%	9%

Figure 15. Vacant Units by year (All designated frontages) - Putney Town Centre

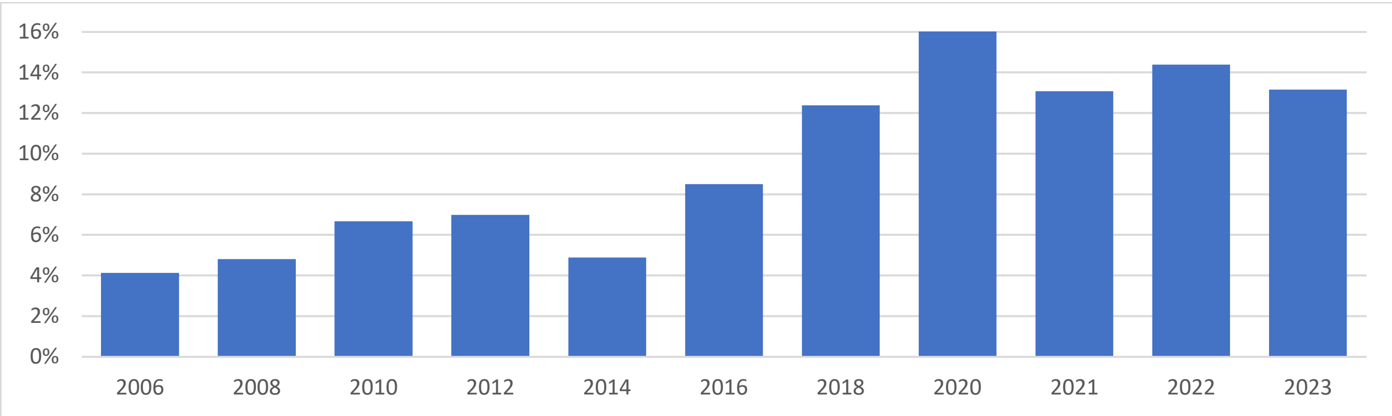


Table 27. Vacant Units by year (Core frontages) - Putney Town Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	94	94	92	91	89	85	85	85	84	84	82	88
Vacant Units	3	3	9	7	6	6	15	16	16	16	9	10
Vacancy Rate	3%	3%	10%	8%	7%	7%	18%	19%	19%	19%	11%	11%

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

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	102	100	107	107	105	107	106	107	105	105	105	105
Vacant Units	5	5	7	5	7	9	13	19	15	13	12	9
Vacancy Rate	5%	5%	7%	5%	7%	8%	12%	18%	14%	12%	11%	9%

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

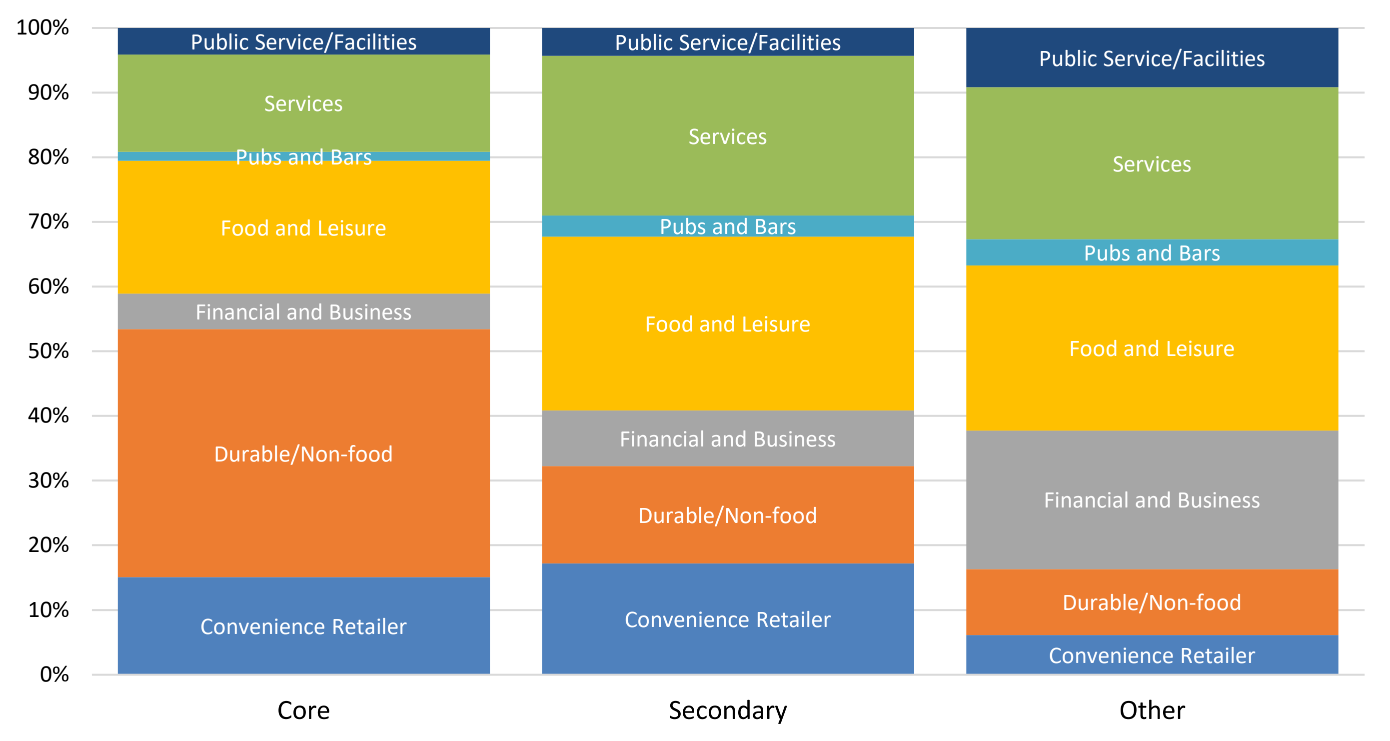
	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	119	118	116	117	113	114	113	116	117	117	117	116
Vacant Units	5	7	5	10	2	11	7	15	9	15	19	9
Vacancy Rate	4%	6%	4%	9%	2%	10%	6%	13%	8%	13%	16%	7%

21. Putney Town Centre - Retail Categories

Table 30. Percentage of trading units by retail category and frontage - Putney Town Centre

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	15%	38%	5%	21%	1%	15%	4%
Secondary	17%	15%	9%	27%	3%	25%	4%
Other	6%	10%	21%	26%	4%	23%	9%
Total	**13%**	**20%**	**13%**	**25%**	**3%**	**22%**	**6%**

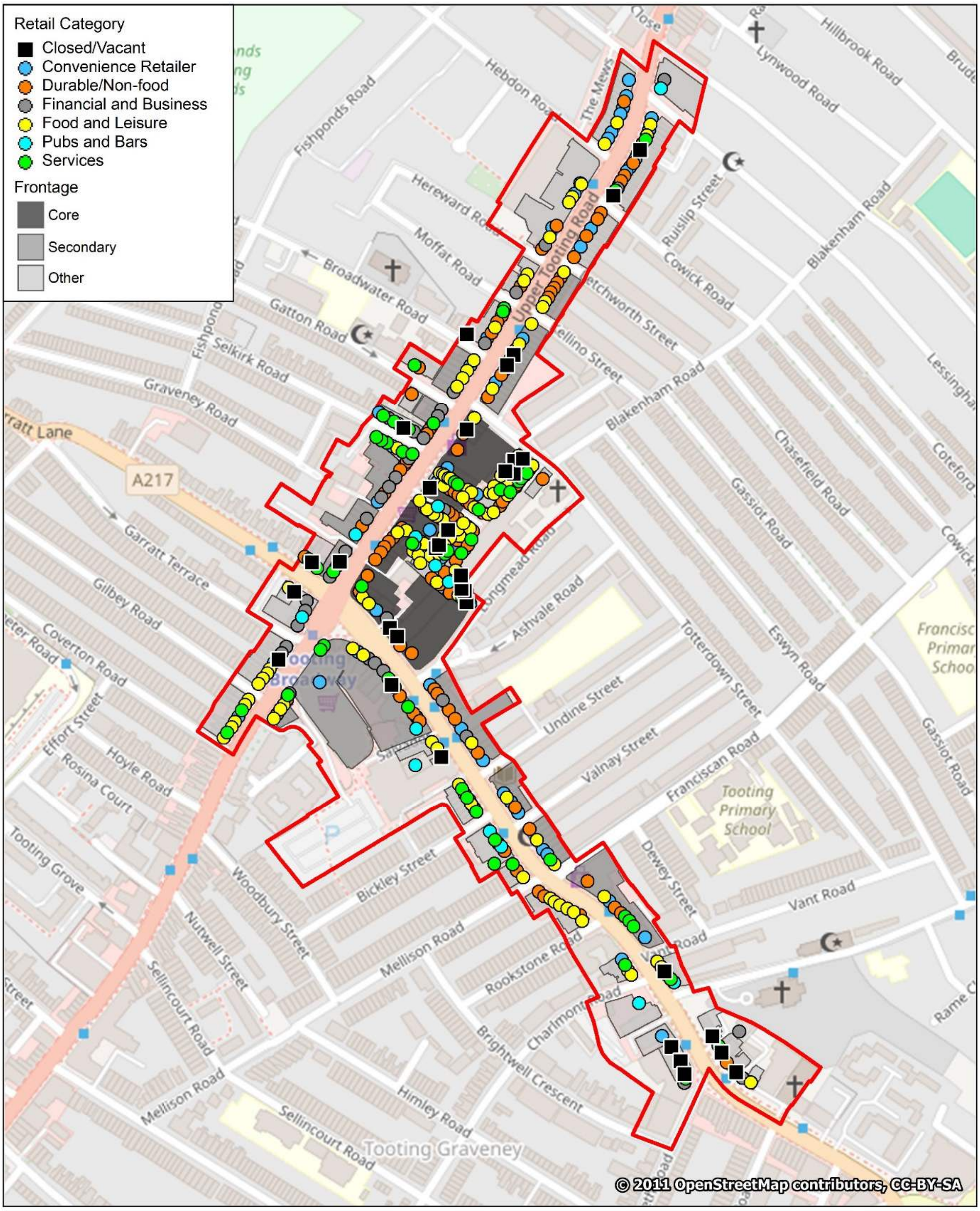
Figure 16. Percentage of trading units by retail category and frontage - Putney Town Centre



22. Tooting Town Centre – Headline Results

The number of vacant units in Tooting Town Centre has increased by one unit since 2022, with the vacancy rate increasing marginally from 7.4% to 7.7%. Vacant units in Core frontages increased by 2 units, there was no change in Secondary frontages and a decrease of 1 vacant unit in Other frontages.

Figure 17. Tooting Town Centre



23. Tooting Town Centre – Vacancies by Frontage

- There were 34 vacancies in Tooting Town Centre in 2023. 14 of the vacant units are newly vacant including 6 Durable/Non-food and 3 Financial and Business units.
- Both Core and Secondary frontages had 4 vacant units and the remaining 286 were in Other frontages
- The majority of vacant units were on Tooting High Street. In Tooting Market there were 4 vacant units and in Broadway Market there were 7 vacant units.
-

Table 31. Vacant Units by year (All designated frontages) - Tooting Town Centre

	2006	2008	2010	2012	2014	2016	2018	2020*	2021*	2022	2023	Average
Total Units	407	410	408	432	430	450	448	403	309	444	444	414
Vacant Units	14	27	22	21	32	26	38	42	24	33	34	28
Vacancy Rate	3%	7%	5%	5%	7%	6%	8%	10%	8%	7%	8%	7%

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

Figure 18. Vacant Units by year (All designated frontages) - Tooting Town Centre

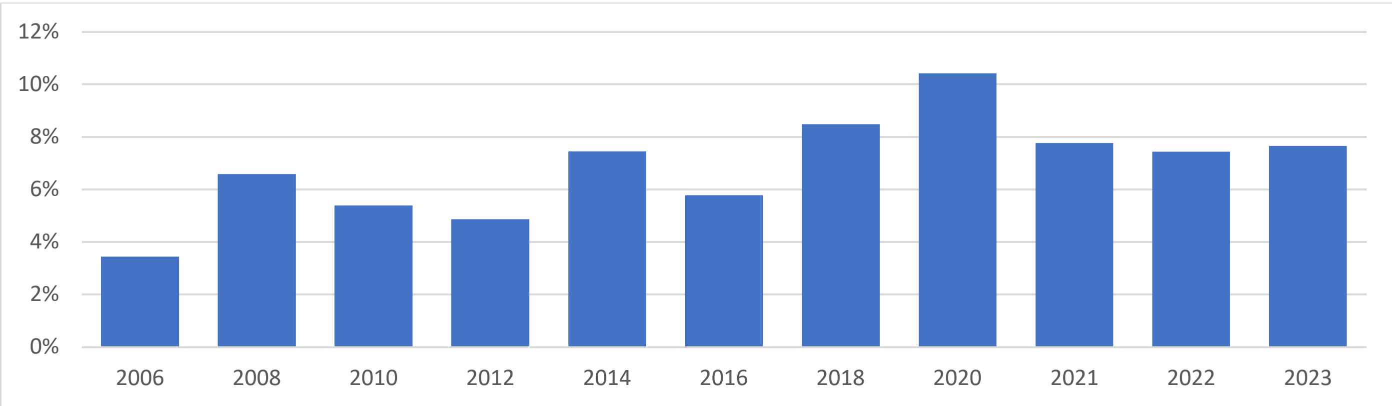


Table 32. Vacant Units by year (Core frontages) - Tooting Town Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	28	29	27	27	28	27	26	27	26	26	26	27
Vacant Units	0	2	2	1	1	1	1	1	1	2	4	1
Vacancy Rate	0%	7%	7%	4%	4%	4%	4%	4%	4%	8%	15%	5%

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

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	103	103	113	113	111	114	111	113	110	110	110	110
Vacant Units	5	7	4	6	5	6	6	7	2	4	4	5
Vacancy Rate	5%	7%	4%	5%	5%	5%	5%	6%	2%	4%	4%	5%

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

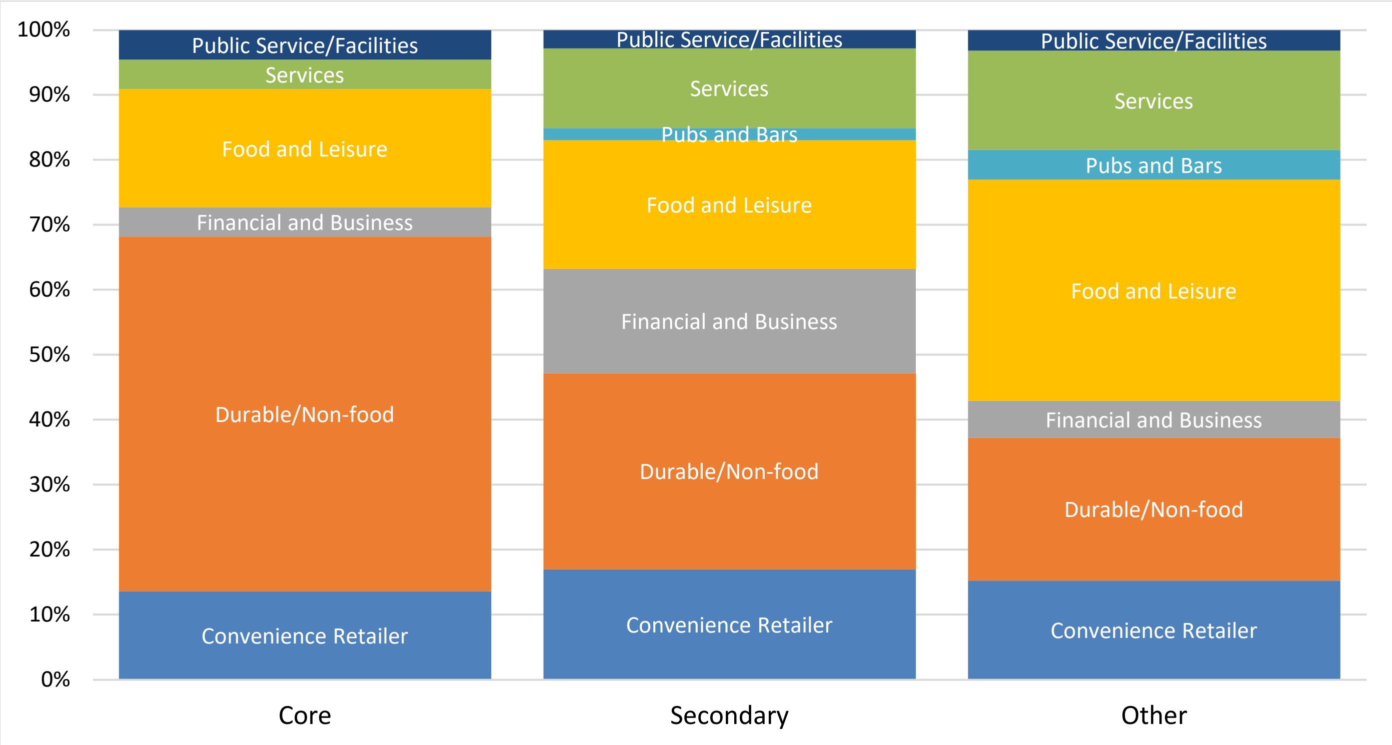
	2006	2008	2010	2012	2014	2016	2018	2020*	2021*	2022	2023	Average
Total Units	276	278	268	292	291	309	311	263	173	308	308	280
Vacant Units	9	18	16	14	26	19	31	34	21	27	26	22
Vacancy Rate	3%	6%	6%	5%	9%	6%	10%	13%	12%	9%	8%	8%

24. Tooting Town Centre – Retail Categories

Table 35. Percentage of trading units by retail category and frontage - Tooting Town Centre

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	14%	55%	5%	18%	0%	5%	5%
Secondary	17%	30%	16%	20%	2%	12%	3%
Other	15%	22%	6%	34%	5%	15%	3%
Total	**16%**	**26%**	**8%**	**30%**	**4%**	**14%**	**3%**

Figure 19. Percentage of trading units by retail category and frontage - Tooting Town Centre

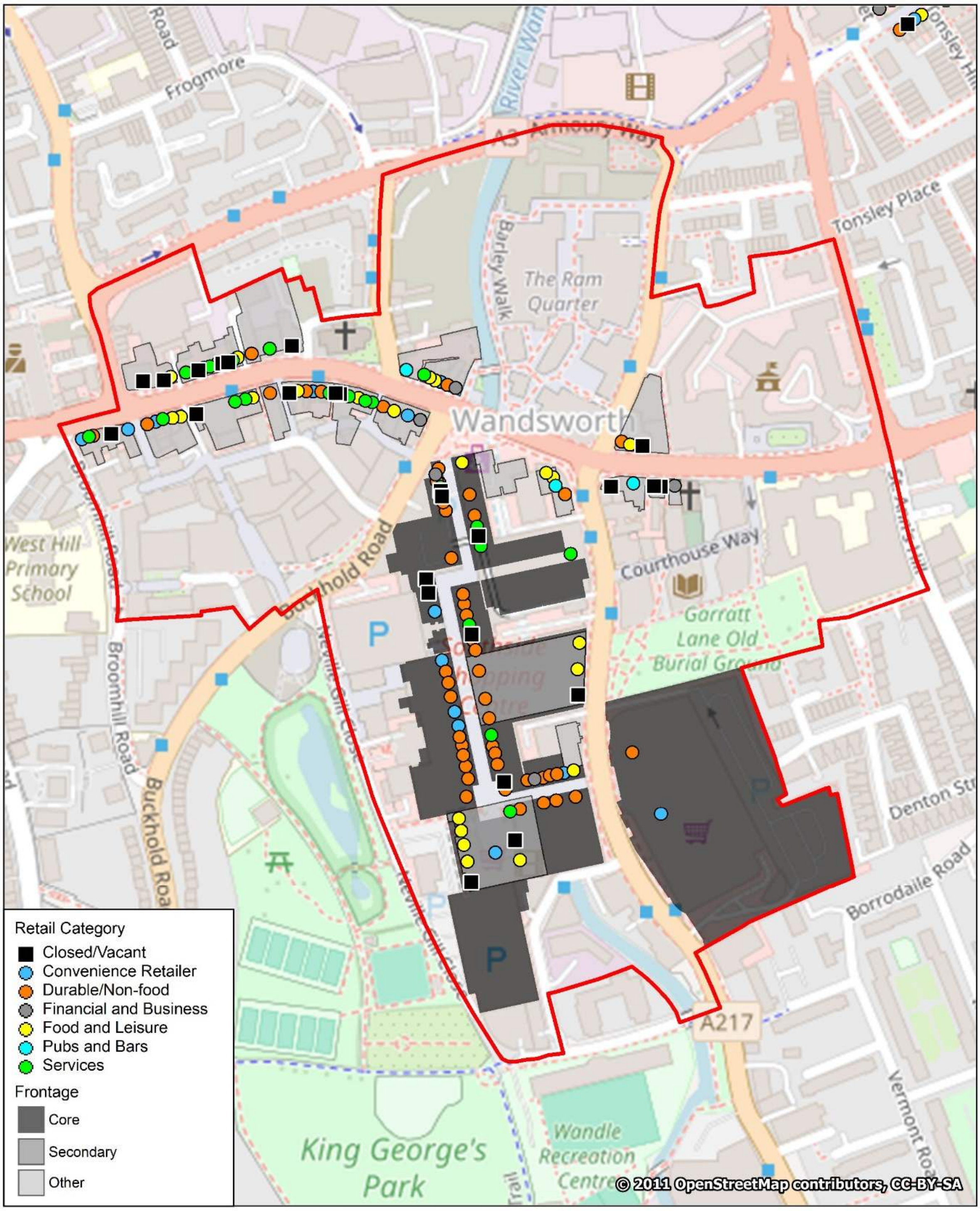


25. Wandsworth Town Centre – Headline Results

The combined vacancy rate in Core and Other frontages in Wandsworth Town Centre has decreased to 17%, compared to the 23% recorded in 2022. There were 25 units recorded as vacant or closed in 2023, which is 10 fewer than in 2022.

The protected frontages in Wandsworth Town Centre consist of Core Shopping frontages and protected Other frontages only; there are no Secondary frontages designated within Wandsworth Town Centre. Apart from Sainsbury's in Garratt Lane, all the Core Shopping frontages are entirely within the indoor Southside shopping centre.

Figure 20. Wandsworth Town Centre



26. Wandsworth Town Centre – Vacancies by Frontage

- There were 25 vacancies in Wandsworth Town Centre of which 5 were newly vacant and 20 were recorded as vacant in 2022.
- Units in the Core Frontage saw a decrease of 1 unit resulting in an 11% vacancy rate and Other frontages saw a decrease from 32% in 2022 to 22% 2023. In Southside Shopping Centre, 7 units were recorded as vacant/closed.

Table 36. Vacant Units by year (All designated frontages) - Wandsworth Town Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	178	177	169	170	144	143	149	151	150	149	147	160
Vacant Units	27	52	43	47	13	13	14	23	25	35	25	29
Vacancy Rate	15%	29%	25%	28%	9%	9%	9%	15%	17%	23%	17%	18%

Figure 21. Vacant Units by year (All designated frontages) - Wandsworth Town Centre

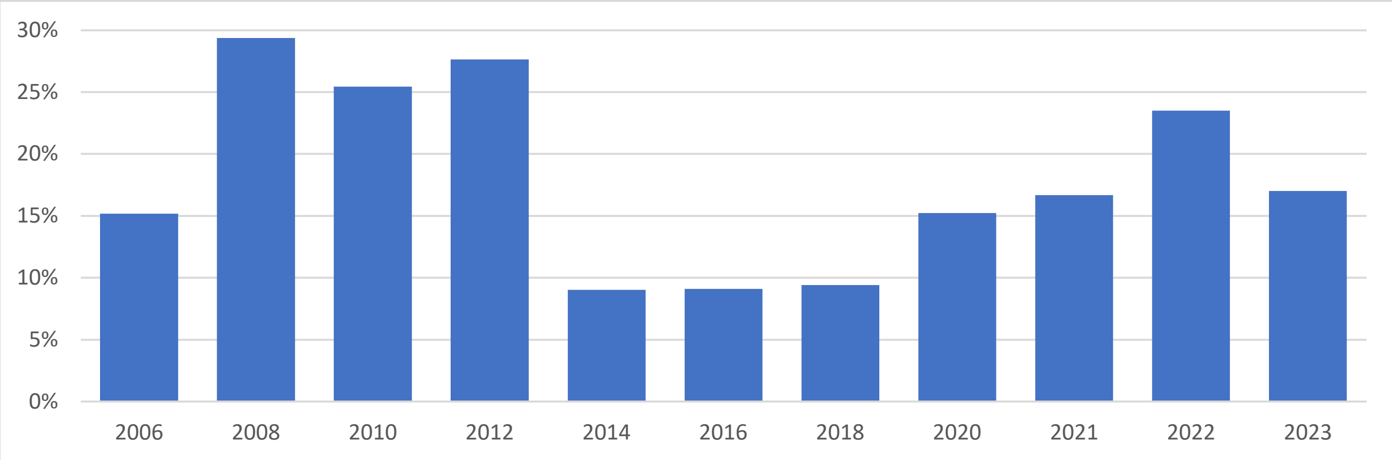


Table 37. Vacant Units by year (Core frontages) - Wandsworth Town Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	52	50	86	87	63	65	65	65	64	65	64	66
Vacant Units	3	6	23	28	5	5	3	9	7	8	7	9
Vacancy Rate	6%	12%	27%	32%	8%	8%	5%	14%	11%	12%	11%	14%

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

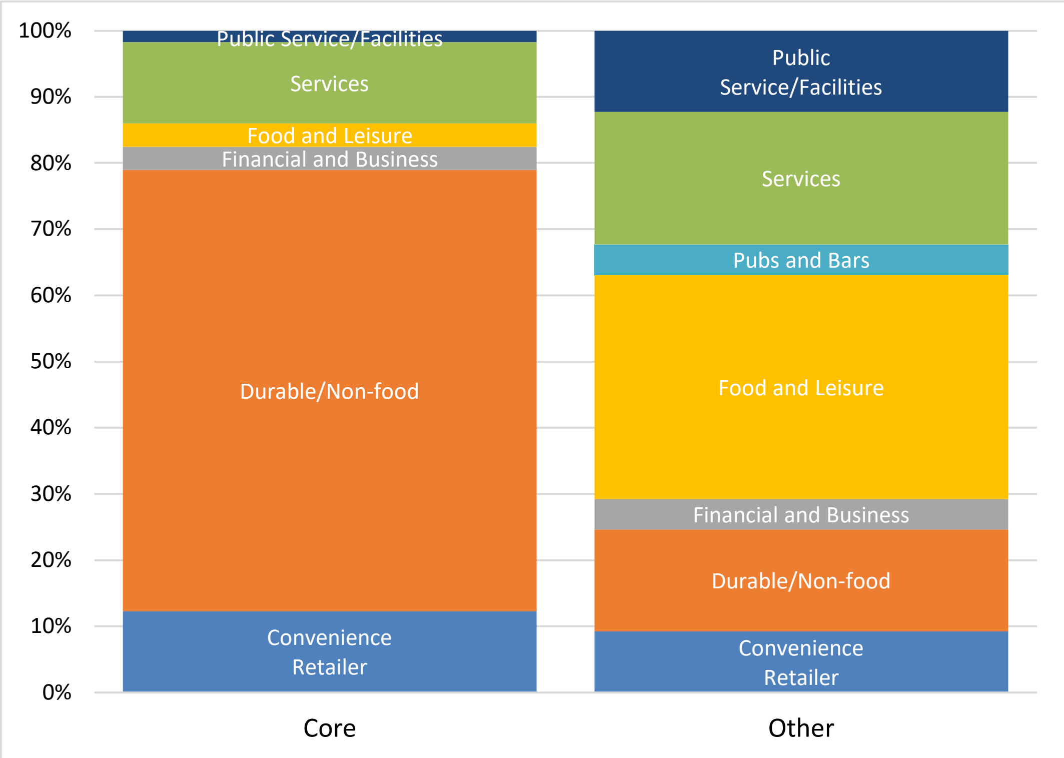
	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	105	105	83	83	81	78	84	86	86	84	83	87
Vacant Units	17	36	20	19	8	8	11	14	18	27	18	18
Vacancy Rate	16%	34%	24%	23%	10%	10%	13%	16%	21%	32%	22%	20%

27. Wandsworth Town Centre – Retail Categories

Table 39. Percentage of trading units by retail category and frontage - Wandsworth Town Centre

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	12%	67%	4%	4%	0%	12%	2%
Other	9%	15%	5%	34%	5%	20%	12%
Total	**11%**	**39%**	**4%**	**20%**	**2%**	**16%**	**7%**

Figure 22. Percentage of trading units by retail category and frontage - Wandsworth Town Centre



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28. Battersea Power Station Central Activities Zone (CAZ) retail cluster

The Battersea Power Station site is emerging as a new retail cluster that will ultimately perform the same function as a town centre. The first retail units in the turbine hall opened in October 2022 and there are currently 150 retail units in total in and around the Power Station. Additional retail units will also be opening in the future as the different phases of the development are completed. For the purposes of this report only fully completed areas are included.

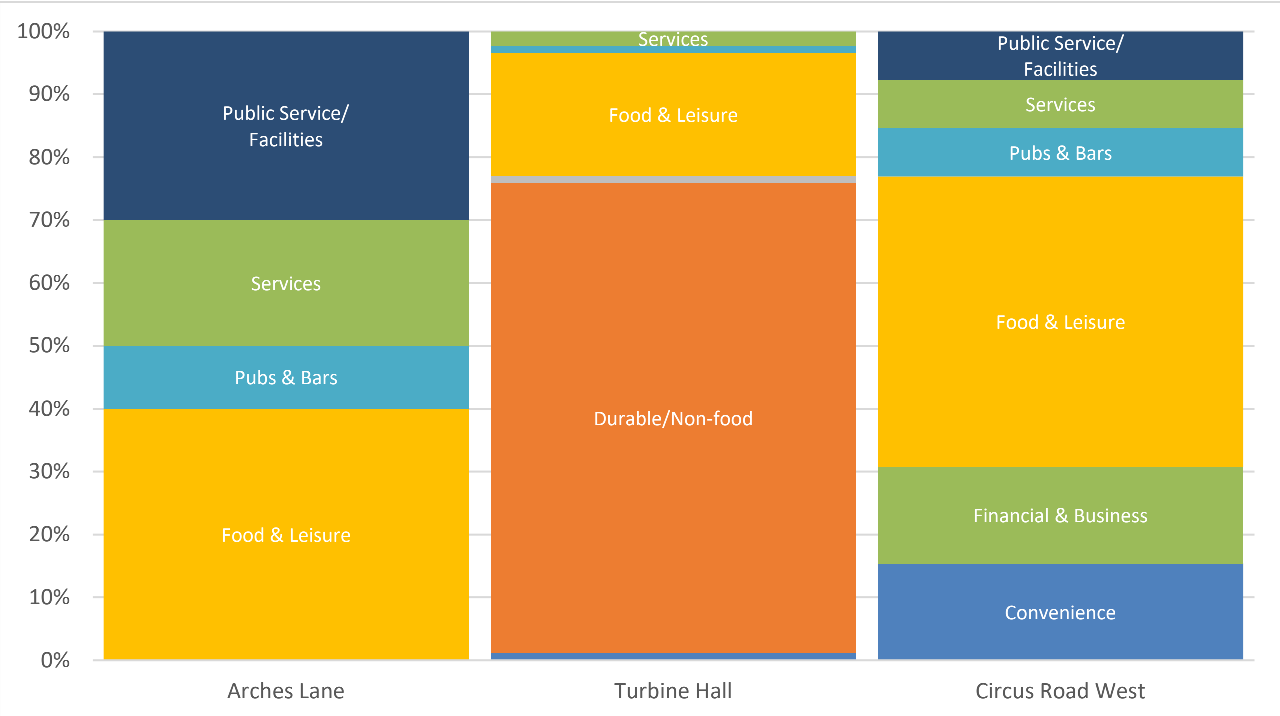
Table 41. Number of units in the Battersea Power Station site – October 2023

Area	Total Units	Vacant Units	Vacancy Rate
Arches Lane	13	3	23%
Turbine Hall	98	11	11%
Circus Road West	15	2	13%
Total	126	16	13%

Table 40. Percentage of trading units by retail category in the Battersea Power Station site

Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
3%	59%	3%	25%	3%	5%	4%

Figure 23. Percentage of trading units by retail category in the Battersea Power Station site



29. Local Centres – Headline Results

The vacancy rate in all Local Centres has decreased slightly between 2022 and 2023 from 15% to 13%. The vacancy rate is at the same level in Core, Secondary and Other frontages. 2023 saw the first decrease in vacancy rates since 2020.

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

30. Local Centres – Vacancies by Frontage

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

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	559	555	562	553	546	561	562	528	558	558	549	554
Vacant Units	52	61	58	62	59	43	70	68	76	84	72	64
Vacancy Rate	9%	11%	10%	11%	11%	8%	12%	13%	14%	15%	13%	12%

Figure 24. Vacant Units by year (All designated frontages) - Local Centres

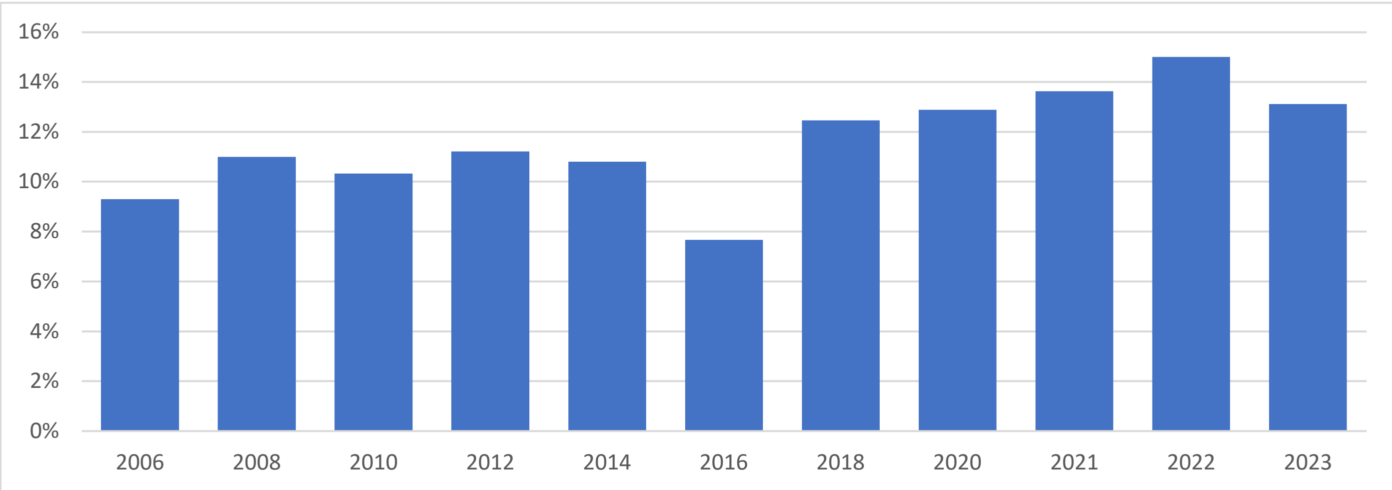


Table 44. Vacant Units by year (Core frontages) - Local Centres

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	128	126	126	125	104	105	104	99	103	103	115	113
Vacant Units	10	9	12	13	11	5	12	11	15	17	15	12
Vacancy Rate	8%	7%	10%	10%	11%	5%	12%	11%	15%	17%	13%	11%

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

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	136	136	142	141	159	163	163	153	161	161	167	153
Vacant Units	17	18	14	16	19	10	21	25	22	24	21	19
Vacancy Rate	13%	13%	10%	11%	12%	6%	13%	16%	14%	15%	13%	12%

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

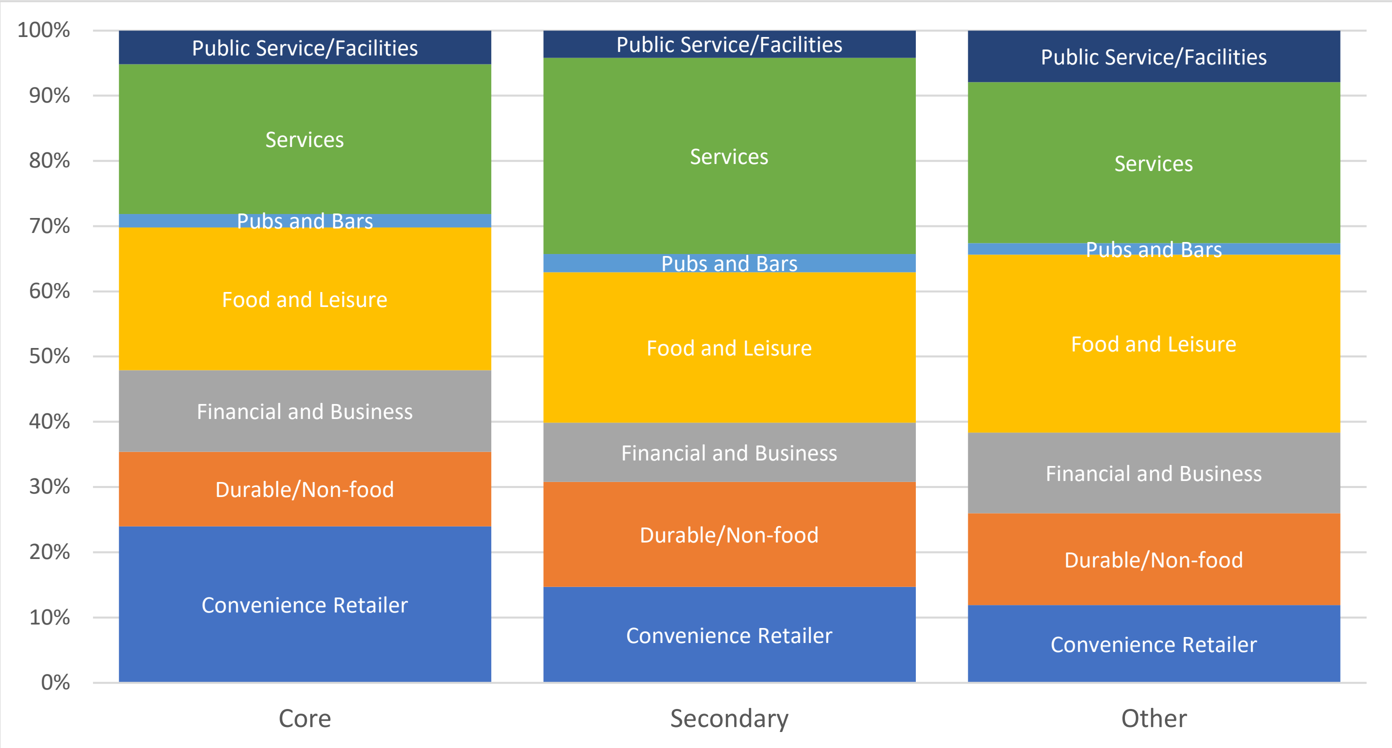
	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	295	293	294	287	283	293	295	276	294	294	267	288
Vacant Units	25	34	32	33	29	28	37	32	39	43	36	33
Vacancy Rate	8%	12%	11%	11%	10%	10%	13%	12%	13%	15%	13%	12%

31. Local Centres – Retail Categories by Frontage

Table 43. Percentage of trading units in Local Centres by retail category and frontage

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	24%	11%	13%	22%	2%	23%	5%
Secondary	15%	16%	9%	23%	3%	30%	4%
Other	12%	14%	12%	27%	2%	25%	8%
Total	**15%**	**14%**	**11%**	**25%**	**2%**	**26%**	**6%**

Figure 25. Percentage of trading units in Local Centres by retail category and frontage



32. Local Centres – Retail Categories by Centre

Table 44. Percentage of trading units in Local Centres by retail category

Local Centre	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Services
Battersea Park Rd	11%	23%	13%	23%	2%	24%	5%
Bellevue Rd	12%	12%	12%	33%	2%	23%	7%
Clapham South	21%	9%	9%	24%	0%	30%	6%
Earlsfield	11%	9%	14%	28%	3%	30%	4%
Lavender Hill	10%	17%	10%	29%	0%	29%	6%
Mitcham Lane	19%	12%	14%	17%	5%	21%	12%
Roehampton	25%	5%	10%	23%	5%	25%	8%
Southfields	27%	15%	13%	15%	2%	24%	5%
Tooting Bec	10%	17%	12%	29%	2%	24%	7%
Total	**16%**	**13%**	**12%**	**24%**	**2%**	**26%**	**6%**

Figure 26. Percentage of trading units in Local Centres by retail category

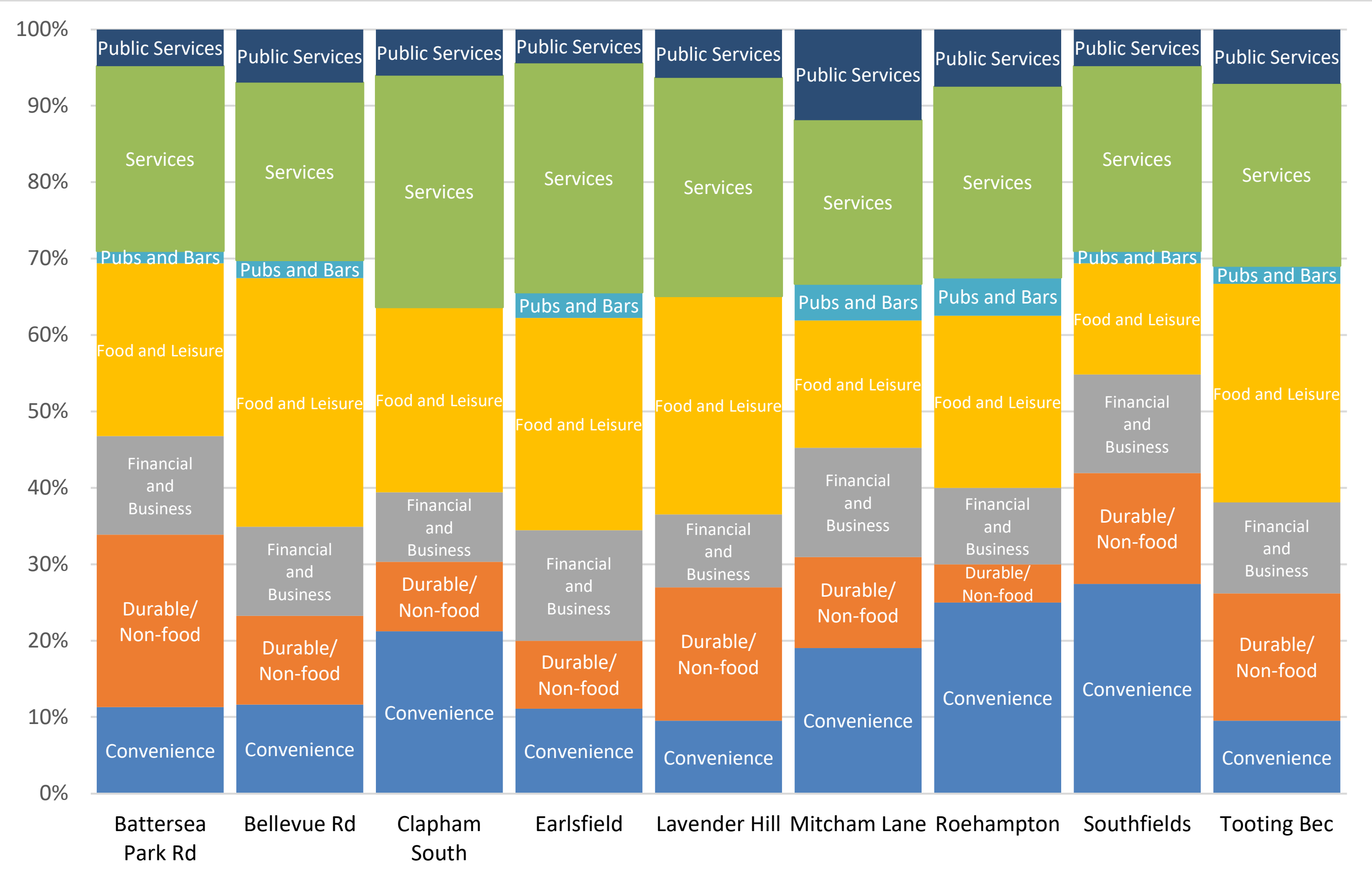


Table 45. Change in Percentage of trading units in Local Centres by retail category – 2023 compared to 2022

Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
-0.4%	0.8%	-0.7%	0.7%	-0.4%	0.1%	0.0%

33. Battersea Park Road Local Centre

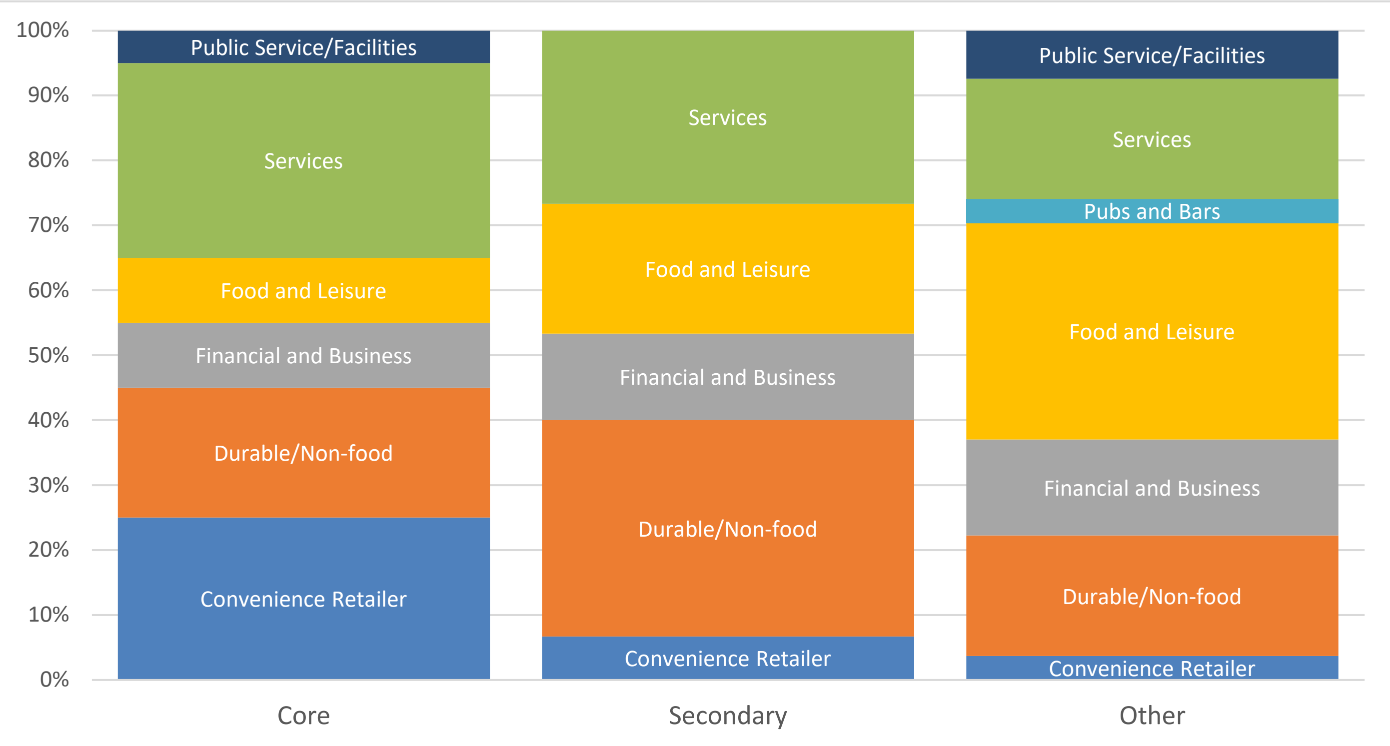
Table 46. Vacant Units by year (All designated frontages) - Battersea Park Road Local Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	68	68	68	67	64	67	67	68	68	68	65	67
Vacant Units	6	10	8	8	4	4	3	6	4	5	3	6
Vacancy Rate	9%	15%	12%	12%	6%	6%	4%	9%	6%	7%	5%	8%

Table 47. Percentage of trading units in Battersea Park Road Local Centre by retail category and frontage

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	25%	20%	10%	10%	0%	30%	5%
Secondary	7%	33%	13%	20%	0%	27%	0%
Other	4%	19%	15%	33%	4%	19%	7%
Total	**11%**	**23%**	**13%**	**23%**	**2%**	**24%**	**5%**

Figure 27. Percentage of trading units in Battersea Park Road Local Centre by retail category and frontage



34. Bellevue Road Local Centre

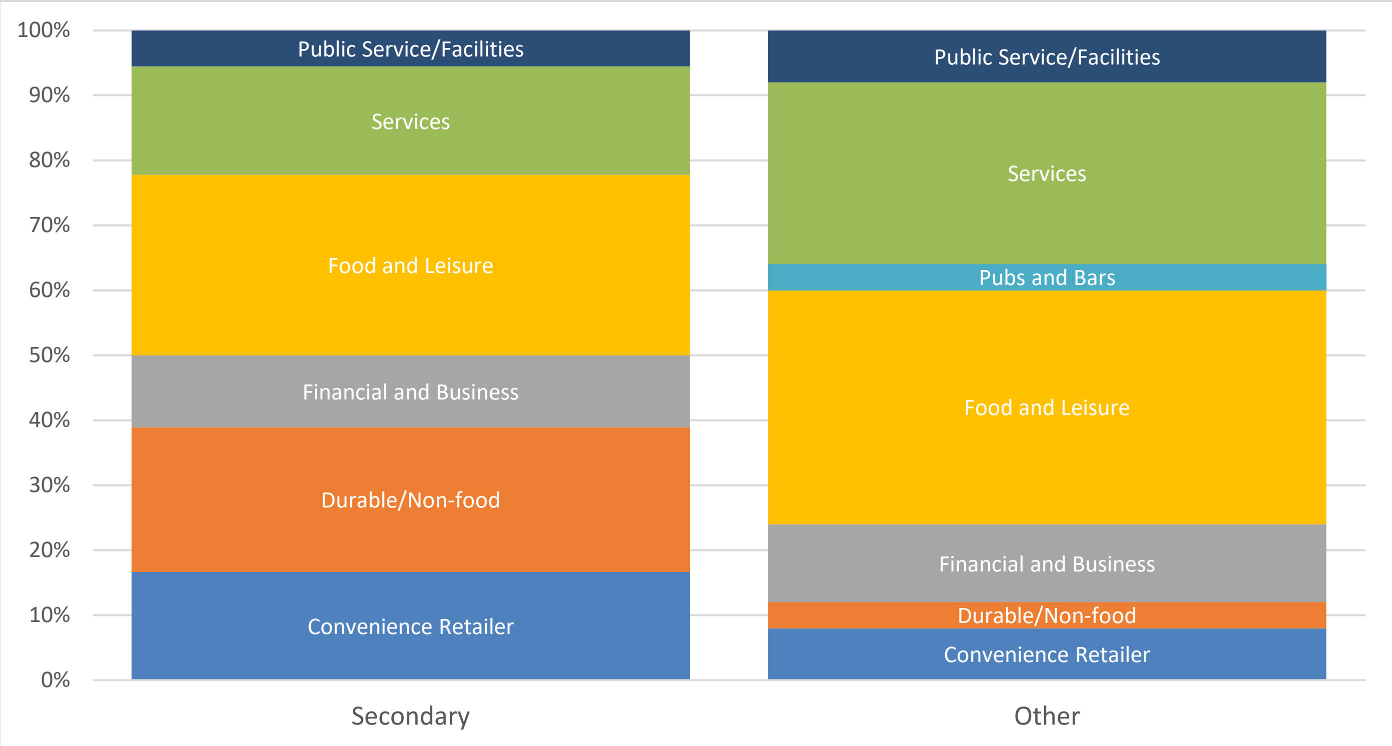
Table 48. Vacant Units by year (All designated frontages) - Bellevue Road Local Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	50	50	51	49	47	48	48	48	48	48	45	48
Vacant Units	3	1	2	5	3	1	4	6	2	0	2	3
Vacancy Rate	6%	2%	4%	10%	6%	2%	8%	13%	4%	0%	4%	5%

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

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Secondary	17%	22%	11%	28%	0%	17%	6%
Other	8%	4%	12%	36%	4%	28%	8%
Total	**12%**	**12%**	**12%**	**33%**	**2%**	**23%**	**7%**

Figure 28. Percentage of trading units in Bellevue Road Local Centre by retail category and frontage



35. Clapham South Local Centre

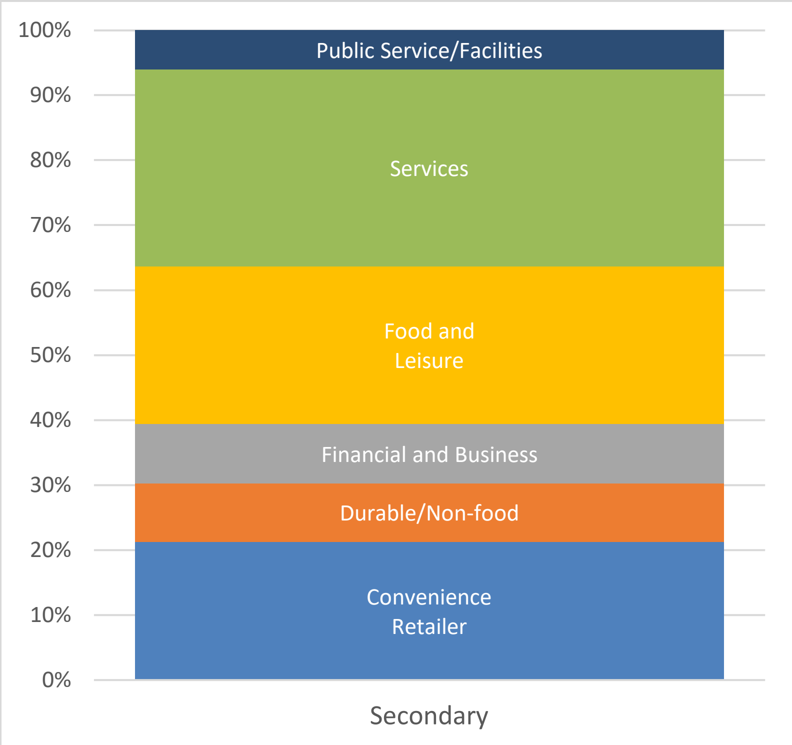
Table 50. Vacant Units by year (All designated frontages) - Clapham South Local Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	31	31	36	35	35	36	37	37	36	36	36	35
Vacant Units	2	2	5	3	2	1	4	6	3	3	3	3
Vacancy Rate	6%	6%	14%	9%	6%	3%	11%	16%	8%	8%	8%	9%

Table 51.Percentage of trading units in Clapham South Local Centre by retail category and frontage

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

Figure 29. Percentage of trading units in Clapham South Local Centre by retail category and frontage



36. Earlsfield Local Centre

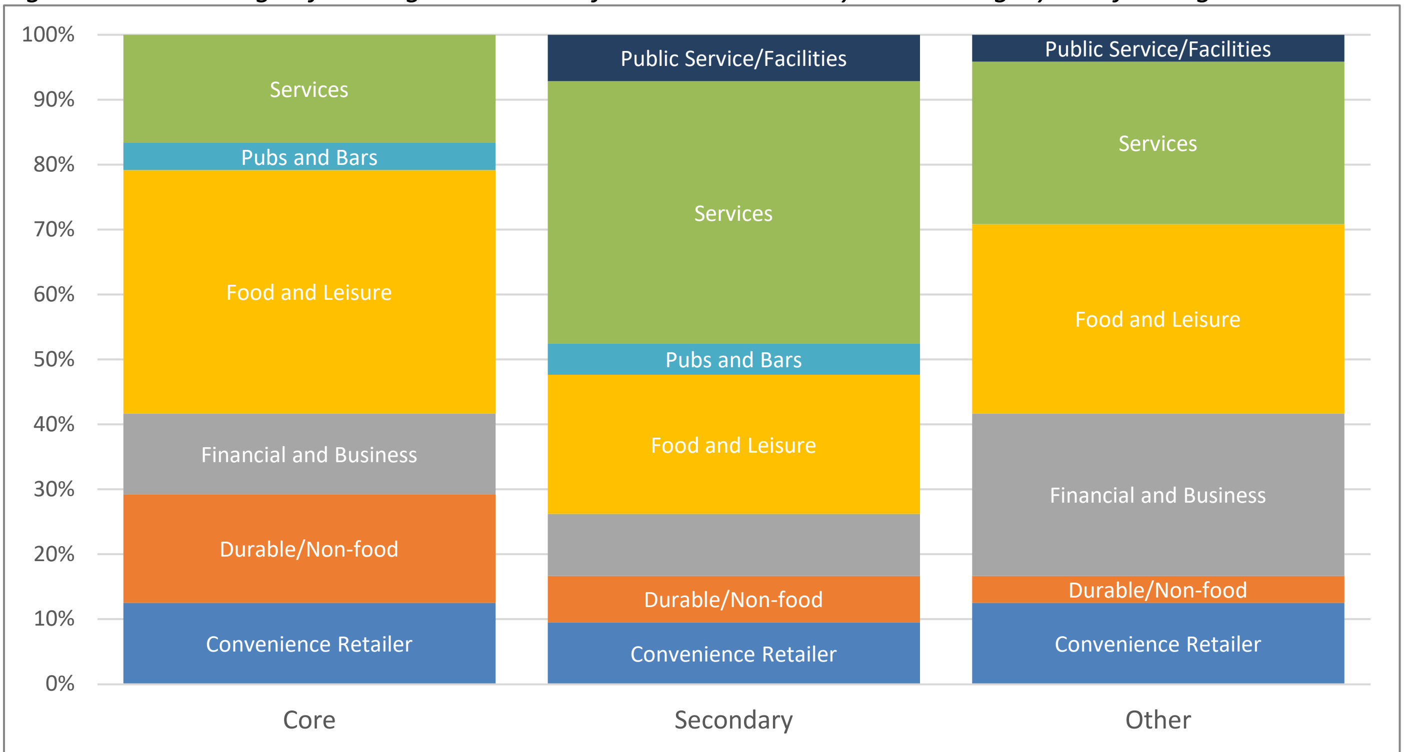
Table 52. Vacant Units by year (All designated frontages) - Earlsfield Local Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	93	91	92	92	93	95	94	94	93	93	94	93
Vacant Units	6	3	3	4	2	6	6	6	8	9	4	5
Vacancy Rate	6%	3%	3%	4%	2%	6%	6%	6%	9%	10%	4%	6%

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

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	13%	17%	13%	38%	4%	17%	0%
Secondary	10%	7%	10%	21%	5%	40%	7%
Other	13%	4%	25%	29%	0%	25%	4%
Total	**11%**	**9%**	**14%**	**28%**	**3%**	**30%**	**4%**

Figure 30. Percentage of trading units in Earlsfield Local Centre by retail category and frontage



37. Lavender Hill/Queenstown Road Local Centre

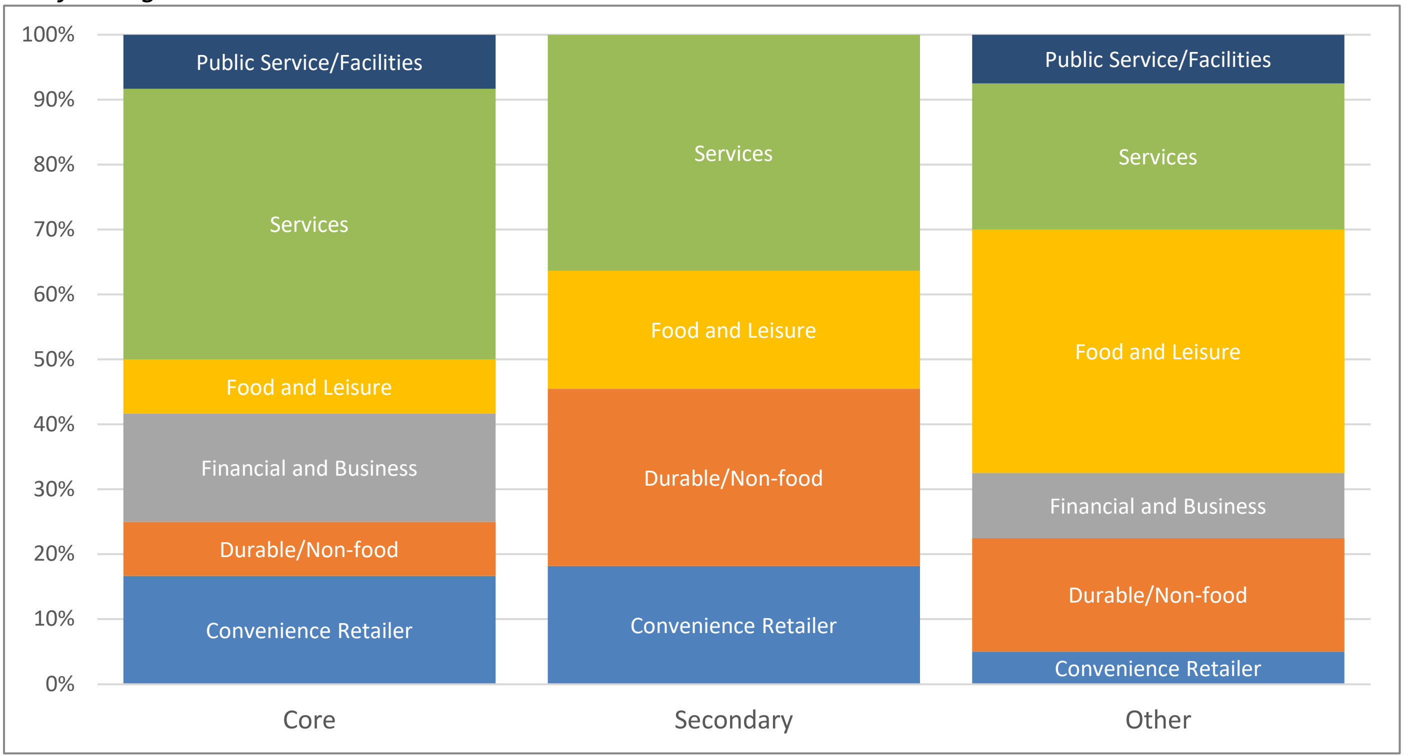
Table 54. Vacant Units by year (All designated frontages) - Lavender Hill/Queenstown Road Local Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	73	73	73	73	72	74	74	74	74	75	75	74
Vacant Units	10	13	11	13	20	11	20	6	12	12	12	13
Vacancy Rate	14%	18%	15%	18%	28%	15%	27%	8%	16%	16%	16%	17%

Table 55. Percentage of trading units in Lavender Hill/Queenstown Road by retail category and frontage

Frontage	Convenience Retailer	Durable/Non-food	Financial and Business	Food and Leisure	Services	Public Service/ Facilities
Core	17%	8%	17%	8%	42%	8%
Secondary	18%	27%	0%	18%	36%	0%
Other	5%	18%	10%	38%	23%	8%
Total	**10%**	**17%**	**10%**	**29%**	**29%**	**6%**

Figure 31. Percentage of trading units in Lavender Hill/Queenstown Road Local Centre by retail category and frontage



38. Mitcham Lane Local Centre

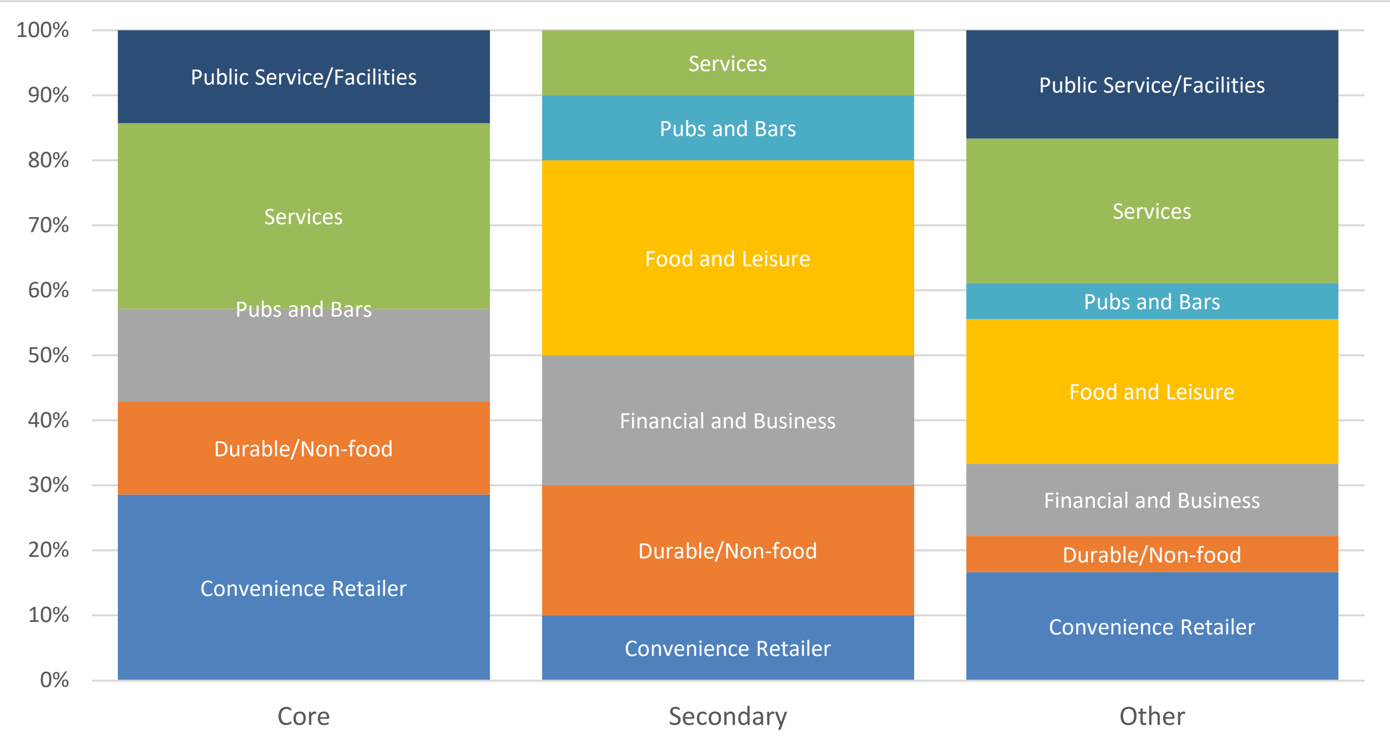
Table 56. Vacant Units by year (All designated frontages) - Mitcham Lane Local Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	62	63	63	62	63	65	65	65	65	65	63	64
Vacant Units	10	13	10	9	18	8	14	16	17	22	21	14
Vacancy Rate	16%	21%	16%	15%	29%	12%	22%	25%	26%	34%	33%	23%

Table 57. Percentage of trading units in Mitcham Lane Local Centre by retail category and frontage

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	29%	14%	14%	0%	0%	29%	14%
Secondary	10%	20%	20%	30%	10%	10%	0%
Other	17%	6%	11%	22%	6%	22%	17%
Total	**19%**	**12%**	**14%**	**17%**	**5%**	**21%**	**12%**

Figure 32. Percentage of trading units in Mitcham Lane Local Centre by retail category and frontage



39. Roehampton Local Centre

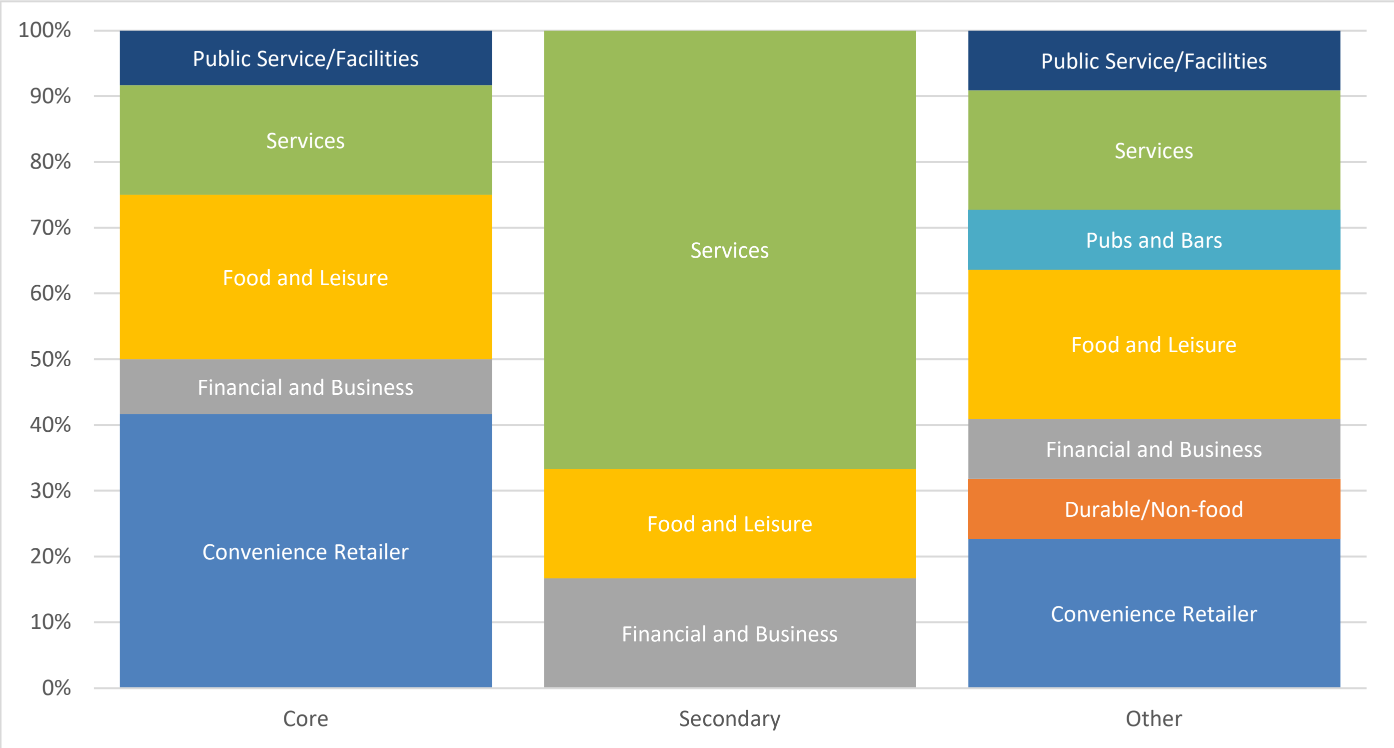
Table 58. Vacant Units by year (All designated frontages) - Roehampton Local Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	52	49	49	49	48	49	50	Not Surveyed	47	47	46	49
Vacant Units	7	9	8	8	4	5	6		10	10	6	7
Vacancy Rate	13%	18%	16%	16%	8%	10%	12%		21%	21%	13%	15%

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

Frontage	*Convenience Retailer*	*Durable/ Non-food*	*Financial and Business*	*Food and Leisure*	*Pubs and Bars*	*Services*	*Public Service/ Facilities*
Core	*42%*	*0%*	*8%*	*25%*	*0%*	*17%*	*8%*
Secondary	*0%*	*0%*	*17%*	*17%*	*0%*	*67%*	*0%*
Other	*23%*	*9%*	*9%*	*23%*	*9%*	*18%*	*9%*
Total	*25%*	*5%*	*10%*	*23%*	*5%*	*25%*	*8%*

Figure 33. Percentage of trading units in Roehampton Local Centre by retail category and frontage



40. Southfields Local Centre

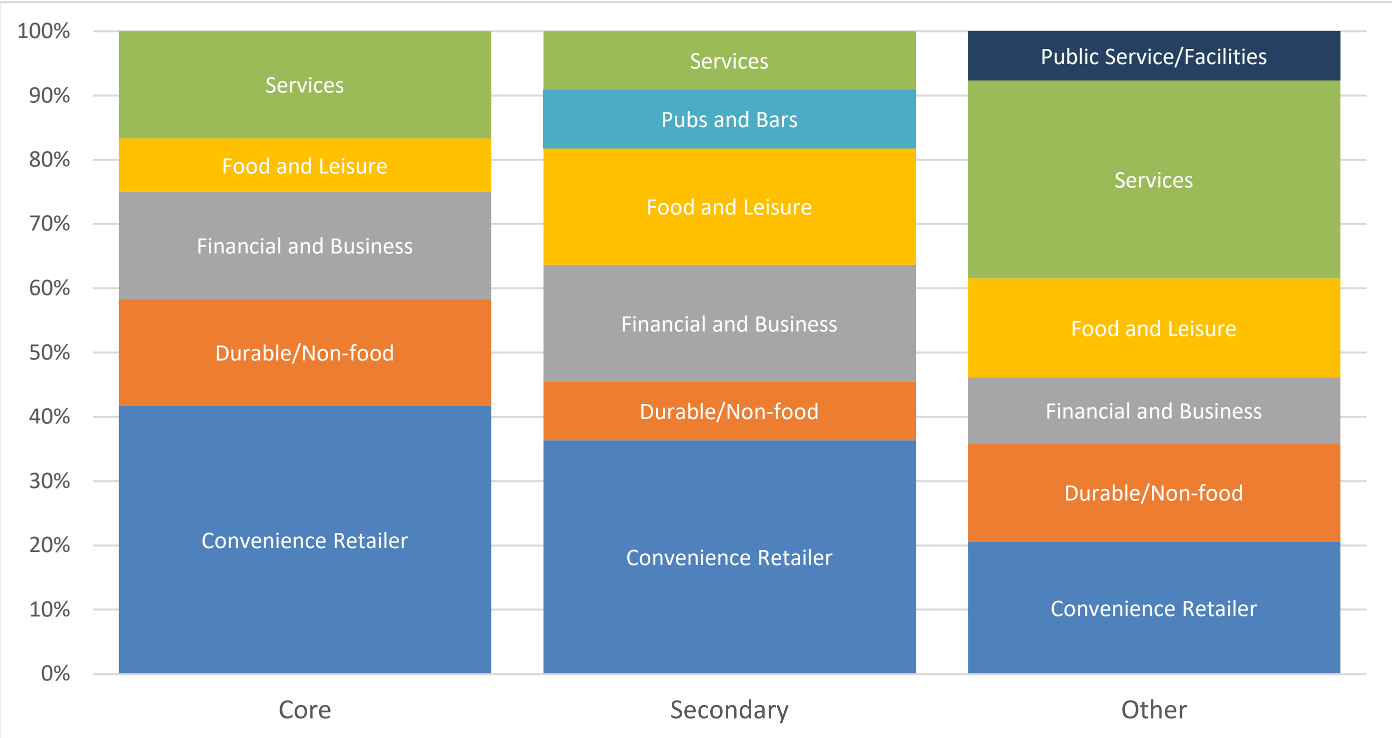
Table 60. Vacant Units by year (All designated frontages) - Southfields Local Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	75	75	75	71	69	71	70	70	71	71	70	72
Vacant Units	3	4	5	8	3	3	5	9	7	12	8	6
Vacancy Rate	4%	5%	7%	11%	4%	4%	7%	13%	10%	17%	11%	9%

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

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	42%	17%	17%	8%	0%	17%	0%
Secondary	36%	9%	18%	18%	9%	9%	0%
Other	21%	15%	10%	15%	0%	31%	8%
Total	**27%**	**15%**	**13%**	**15%**	**2%**	**24%**	**5%**

Figure 34. Percentage of trading units in Southfields Local Centre by retail category and frontage



41. Tooting Bec Local Centre

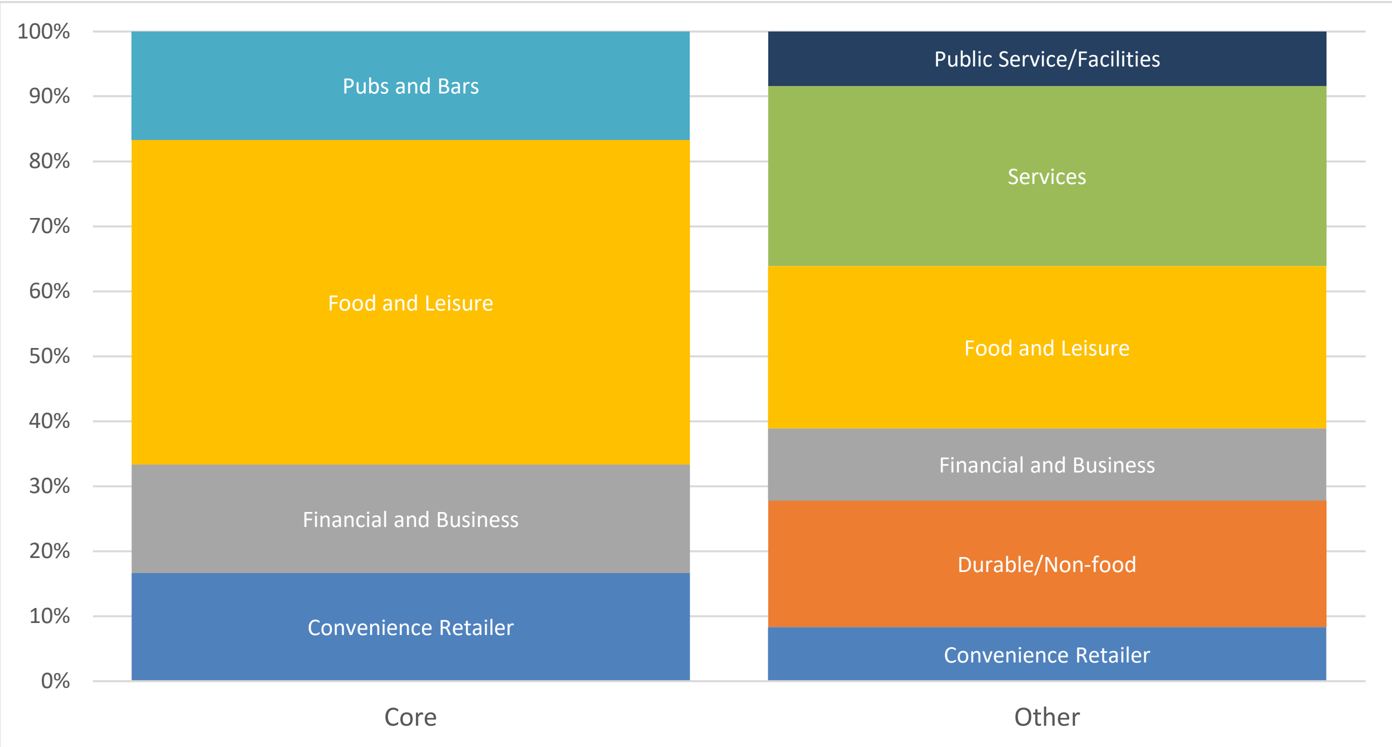
Table 62. Vacant Units by year (All designated frontages) - Tooting Bec Local Centre

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	55	55	55	55	55	56	56	56	56	55	55	55
Vacant Units	5	6	6	5	3	4	7	12	13	11	13	8
Vacancy Rate	9%	11%	11%	9%	5%	7%	13%	21%	23%	20%	24%	14%

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

Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	17%	0%	17%	50%	17%	0%	0%
Other	8%	19%	11%	25%	0%	28%	8%
Total	**10%**	**17%**	**12%**	**29%**	**2%**	**24%**	**7%**

Figure 35. Percentage of trading units in Tooting Bec Local Centre by retail category and frontage



42. Important Local Parades - Vacant Units by year

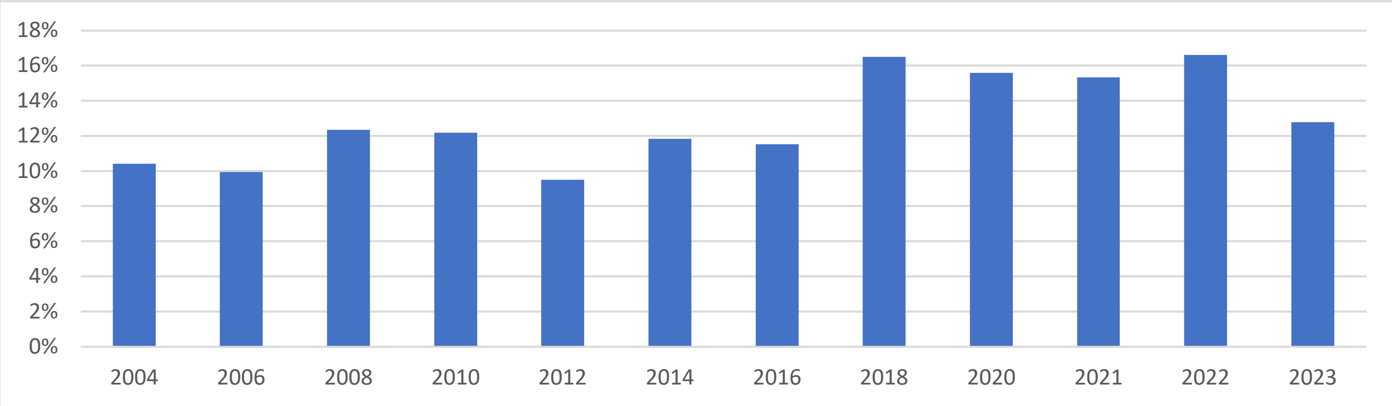
The vacancy rate in Important Local Parades has decreased significantly from 17% in 2022 to 13% in 2023.

Table 64. Vacant Units by year in All Retail Frontages in the Important Local Parades

	2006	2008	2010	2012	2014	2016	2018	2020*	2021	2022	2023	Average
Total Units	342	308	304	305	321	304	303	186	300	301	368	304
Vacant Units	34	38	37	29	38	35	50	29	46	50	47	39
Vacancy Rate	10%	12%	12%	10%	12%	12%	17%	16%	15%	17%	13%	13%

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

Figure 36. Vacancy rate by year in All Retail Frontages in the Important Local Parades

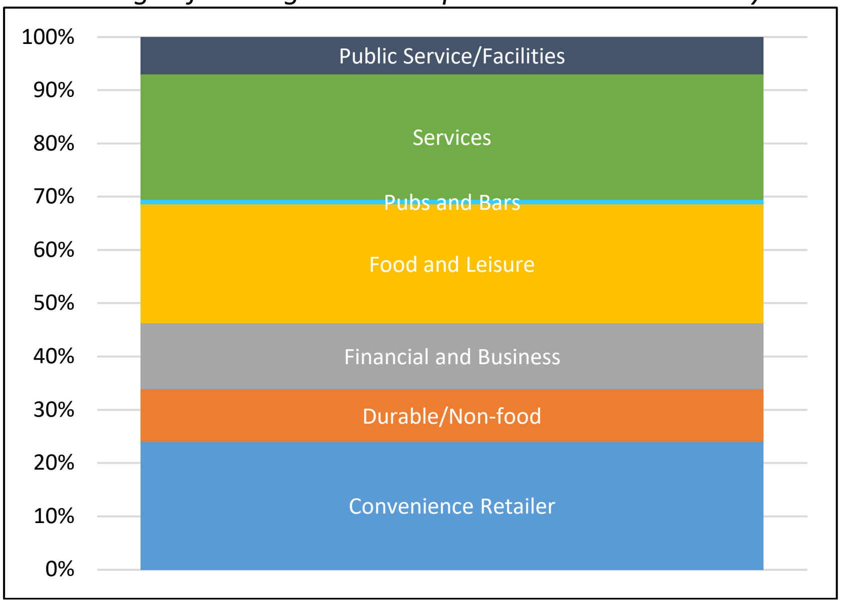


43. Important Local Parades – Retail Categories

Table 65. Percentage of trading units in the Important Local Parades by retail category

Convenience Retailer	Durable/Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
21%	**12%**	**12%**	**22%**	**1%**	**23%**	**8%**

Figure 37. Percentage of trading units in Important Local Parades by retail category



Important Local Parades

Vacant Units by year

ILP (a) - Battersea Bridge Road

152-168 Battersea Bridge Road

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	6	6	6	6	6	6	6	6	7	7	7	6
Vacant Units	0	0	0	0	0	0	1	2	2	1	1	1
Vacancy Rate	0%	0%	0%	0%	0%	0%	17%	33%	29%	14%	14%	10%

ILP (b) - Battersea High Street

141-185 Battersea High Street

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	19	19	19	19	19	19	19	19	19	19	18	19
Vacant Units	5	5	3	3	4	1	4	5	9	7	4	5
Vacancy Rate	26%	26%	16%	16%	21%	5%	21%	26%	47%	37%	22%	24%

ILP (c) - Battersea Park Road

275-305 Battersea Park Road

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	14	13	13	13	13	14	14	14	14	14	12	13
Vacant Units	1	3	2	2	7	2	5	3	2	4	0	3
Vacancy Rate	7%	23%	15%	15%	54%	14%	36%	21%	14%	29%	0%	21%

ILP (d) - Battersea Square

10-31 Battersea Square & 140 Westbridge Road

	2023
Total Units	12
Vacant Units	0
Vacancy Rate	0%

ILP (e) - Beaumont Road

129-139 Beaumont Road

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	7	7	7	7	7	7	7	7	1	2	2	6
Vacant Units	1	0	1	2	2	7	7	7	0	1	1	3
Vacancy Rate	14%	0%	14%	29%	29%	100%	100%	100%	0%	50%	50%	48%

ILP (f) - Blandfield Road

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

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	19	18	18	18	18	18	18	18	18	18	17	18
Vacant Units	3	4	7	3	1	3	3	4	2	1	1	3
Vacancy Rate	16%	22%	39%	17%	6%	17%	17%	22%	11%	6%	6%	16%

ILP (g) - East Hill

47-67 East Hill

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	10	10	10	10	10	10	10	10	10	10	10	10
Vacant Units	0	0	1	1	0	0	2	2	1	2	2	1
Vacancy Rate	0%	0%	10%	10%	0%	0%	20%	20%	10%	20%	20%	10%

ILP (h) - Franciscan Road

135-153 Franciscan Road

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	9	9	9	9	9	9	9	9	9	9	8	9
Vacant Units	0	1	1	0	1	0	0	0	0	0	1	0
Vacancy Rate	0%	11%	11%	0%	11%	0%	0%	0%	0%	0%	13%	4%

ILP (i) - 171-227 Garratt Lane

171-227 Garratt Lane

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	29	29	29	29	29	29	29	29	29	29	26	29
Vacant Units	4	3	3	2	3	6	4	6	3	7	7	4
Vacancy Rate	14%	10%	10%	7%	10%	21%	14%	21%	10%	24%	27%	15%

ILP (j) - 812-919 Garratt Lane

812-842 & 911-919 Garratt Lane

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	20	20	20	20	20	20	20	20	20	20	20	20
Vacant Units	0	1	0	1	1	0	0	1	3	5	5	2
Vacancy Rate	0%	5%	0%	5%	5%	0%	0%	5%	15%	25%	25%	8%

ILP (k) - Inner Park Road

74-88 Inner Park Road

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	7	7	7	7	7	7	7		7	7	7	7
Vacant Units	0	0	0	0	0	0	2		1	1	1	1
Vacancy Rate	0%	0%	0%	0%	0%	0%	29%		14%	14%	14%	7%

ILP (l) - Lower Richmond Road

50-94 Lower Richmond Road

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	23	23	23	23	23	23	22		22	22	21	23
Vacant Units	1	2	3	2	2	3	2		3	3	3	2
Vacancy Rate	4%	9%	13%	9%	9%	13%	9%		14%	14%	14%	11%

ILP (m) - Merton Road

169-201 Merton Road

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	16	16	16	16	16	15	15	15	16	16	16	16
Vacant Units	2	1	0	0	0	1	1	3	3	3	3	2
Vacancy Rate	13%	6%	0%	0%	0%	7%	7%	20%	19%	19%	19%	10%

ILP (n) - Montfort Place

2-12 Montfort Place

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	4	4	4	4	4	4	4		4	4	4	4
Vacant Units	0	0	0	0	1	1	0		0	1	1	0
Vacancy Rate	0%	0%	0%	0%	25%	25%	0%		0%	25%	25%	10%

ILP (o) - Moyser Road

58-86 & 91-111 Moyser Road

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	21	21	21	21	21	20	20		20	20	20	21
Vacant Units	1	3	3	3	2	1	1		1	1	1	2
Vacancy Rate	5%	14%	14%	14%	10%	5%	5%		5%	5%	5%	8%

ILP (p) - Northcote Road

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

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	13	13	13	13	13	13	15	15	15	15	16	14
Vacant Units	0	2	2	0	1	1	3	0	0	0	0	1
Vacancy Rate	0%	15%	15%	0%	8%	8%	20%	0%	0%	0%	0%	6%

ILP (q) - Old York Road

328-372 & 499-551 Old York Road

	2023
Total Units	47
Vacant Units	2
Vacancy Rate	4%

ILP (r) - Petersfield Rise

1-11 Petersfield Rise

	2006	2008	2010	2012	2014	2016	2018	2021	2022	2023	Average
Total Units	4	4	4	4	4	4	4	4	4	4	4
Vacant Units	1	1	0	0	0	0	0	0	0	0	0
Vacancy Rate	25%	25%	0%	0%	0%	0%	0%	0%	0%	0%	5%

ILP (s) - Portswood Place

1-7 Portswood Place

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	6	6	6	6	6	6	6		6	6	6	6
Vacant Units	2	0	1	1	1	1	1		2	1	1	1
Vacancy Rate	33%	0%	17%	17%	17%	17%	17%		33%	17%	17%	18%

ILP (t) - Rockingham Close

1-6 Rockingham Close

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	4	4	4	4	4	4	3	3	4	4	4	4
Vacant Units	0	0	0	0	0	0	0	0	0	0	0	0
Vacancy Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

ILP (u) - Tildesley Road

323-409 Tildesley Road

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	20	20	20	20	20	20	20		20	20	20	20
Vacant Units	7	7	5	8	8	6	12		13	11	9	9
Vacancy Rate	35%	35%	25%	40%	40%	30%	60%		65%	55%	45%	43%

ILP (v) - St Johns Hill

115-141 St Johns Hill

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	17	17	17	17	17	17	17	16	17	17	17	17
Vacant Units	1	1	4	0	1	1	0	0	0	1	0	1
Vacancy Rate	6%	6%	24%	0%	6%	6%	0%	0%	0%	6%	6%	5%

ILP (w) - Trinity Road

314-324 Trinity Road

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	6	6	6	6	6	6	5	5	5	5	5	6
Vacant Units	0	0	1	0	0	0	1	0	0	0	0	0
Vacancy Rate	0%	0%	17%	0%	0%	0%	20%	0%	0%	0%	0%	3%

ILP (x) - 271-299 Upper Richmond Road

271-299 Upper Richmond Road

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	11	11	11	12	12	12	12		12	12	11	12
Vacant Units	0	0	0	1	1	1	1		1	0	0	1
Vacancy Rate	0%	0%	0%	8%	8%	8%	8%		8%	0%	0%	4%

ILP (y) - 349-393 Upper Richmond Road

349-393 Upper Richmond Road

	2006	2008	2010	2012	2014	2016	2018	2020	2021	2022	2023	Average
Total Units	11	11	11	12	12	12	12		12	12	11	12
Vacant Units	0	0	0	1	1	1	1		1	0	0	1
Vacancy Rate	0%	0%	0%	8%	8%	8%	8%		8%	0%	0%	4%

ILP (z) - Webbs Road

30-56 & 65-71 Webb’s Road / 1-2 Ashness Road / 1 Burland Road

	2023
Total Units	18
Vacant Units	1
Vacancy Rate	6%

44. Appendix 1

Convenience Retailer

Baker & Confectioner Butcher Chemist Convenience Store Cosmetics & Beauty Products Shop Delicatessen	Fishmonger Florist Greengrocer Mini Supermarket Newsagent	Off Licence Pet Shop Post Office Sandwich Shop Supermarket

Durable/Non-food

Bookseller Card Carpet Carpets & Flooring Charity Children's & Infants' Wear Clothes Clothes, Crafts, Glass & Gifts	Cosmetics & Beauty Products Department Store Discount Store DIY & Home Improvement Footwear Furniture Haberdashery Homeware	Jewellery, Watches & Silver Ladies' Wear & Accessories Mobile Phone Phone / Vape Sports, Camping & Leisure Goods Stationer Telephones & Accessories Toys, Games & Hobbies

Food and Leisure

Bakery/Café Bar and Restaurant Café	Fast Food & Take Away Restaurant Sushi Bar	Take Away/Restaurant Wine Bar/Restaurant

Services

Amusement Arcade Barber Beauty Salon Computer Repair Shop Cosmetics & Beauty Products Shop Courier Services Dry Cleaner & Launderette Electrical Repairs Funeral Director Glazier	Hair and Beauty Salon Hairdresser Health Clinic Insurance Services Internet Café Launderette Nail Salon Opticians Pet Grooming Phone Repairs Photo Processing	Photography Studio Picture Framing Shop Post Office Print Shop Shoe Repairs & Key Cutting Tailor Tanning Salon Tattoo Parlour Taxi Hire Travel Agent Undertaker

Financial and Business

Accountant Bank & Building Society Betting Shop	Estate Agent Office Solicitor

Public Service/Facilities

Chiropodist Cinema Dentist Doctor's Surgery Education Centre	Gymnasium Health Clinic Library Medical Clinic Osteopath	Physiotherapist Place of Worship School Sports & Leisure Facilities Veterinary Practice Yoga Studio