Town Centre Monitoring Report

2021

Planning

04 March 2022

THE BRIGHTER BOROUGH
Wandsworth

Contents

1. Summary

The town centre land use survey took place between and 6th October and 17th November 2021 and covered all retail premises in designated shopping frontages in Wandsworth borough. Following the introduction of the combined planning use class in 2020, for the purposes of this report premises were classified into six broad retail categories. Vacant units were recorded where a judgement was made that they were not trading on the day of the site survey which was confirmed where possible with additional research. Tooting and Broadway indoor markets were not surveyed in 2021. In the 2020 survey around a third of Local Parades and Tooting Market were not surveyed.

2. Introduction

1. Surveys of all the Town Centres, Local Centres, and Important Local Parades have been carried out in the Borough of Wandsworth on a biennial basis since 1988. They cover approximately 2,500 properties and the last survey was carried out in 2021. The survey collects information on all ground floor units within the protected shopping frontages. Details of the occupier, use and use class were collected enabling changes in the number of units and use class to be monitored over time. The boundaries used in this report include all the shopping frontages detailed in the Council's adopted Local Plan, 2016.

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

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

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

3. Structural changes to retailing

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

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

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

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

4. Changes to permitted development rights

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

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[2]. 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[3]	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.

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

5. Introduction of combined business class

Class E (Commercial, business and service)

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

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

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

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

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

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

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

6. Methodology

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

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

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

7. Retail Category Definitions

Classification of the type of retail use

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

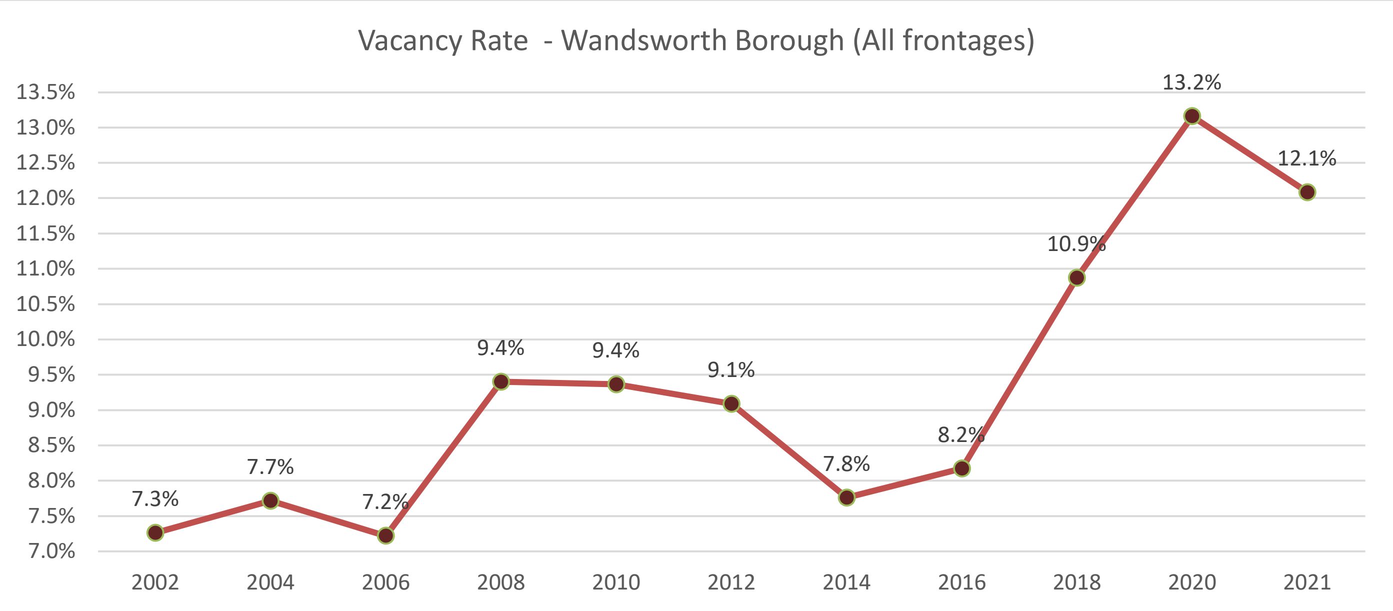
8. Summary of Vacancies

The overall number of vacant units in the borough has decreased slightly since 2020 with 261 vacant units, a vacancy rate of 12%. The overall vacancy rate in all frontages has decreased to 12.1% in 2021 from 13.2% in 2020.

Vacant Units by year - Boroughwide (All frontages)

	2002	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	1969	2346	2354	2308	2328	2322	2280	2300	2308	2120	2160	2254
Vacant Units	143	181	170	217	218	211	177	188	251	279	261	209
Vacancy Rate	7%	8%	7%	9%	9%	9%	8%	8%	11%	13%	12%	9%

Boroughwide Centre Vacancy Rate (All frontages)



Town Centres - Vacant Units by year (All frontages)

	2002	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	1404	1441	1453	1445	1462	1464	1413	1435	1443	1406	1304	1425
Vacant Units	82	96	84	118	123	120	80	110	131	182	139	115
Vacancy Rate	5.8%	6.7%	5.8%	8.2%	8.4%	8.2%	5.7%	7.7%	9.1%	12.9%	10.7%	8.1%

Local Centres - Vacant Units by year (All frontages)

	2002	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	565	559	559	555	562	553	546	561	562	528	556	555
Vacant Units	61	49	52	61	58	62	59	43	70	68	76	60
Vacancy Rate	10.8%	8.8%	9.3%	11.0%	10.3%	11.2%	10.8%	7.7%	12.5%	12.9%	13.7%	10.8%

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

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

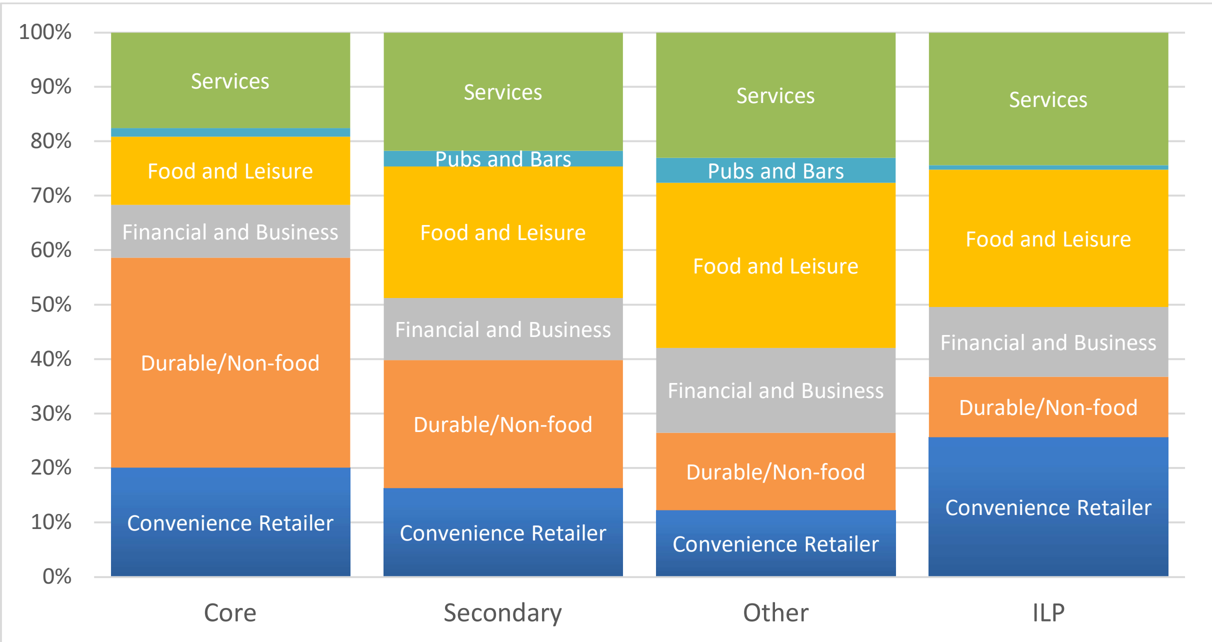
9. Retail Categories by Frontage

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

Percentage of units in protected frontages by retail category

Retail Category	**Core**	**Secondary**	**Other**	**Important Local Parade**	**Total**
Food and Leisure	11%	21%	25%	20%	21%
Durable/Non-food	33%	20%	12%	9%	17%
Services	15%	19%	19%	20%	18%
Convenience Retailer	17%	14%	10%	21%	14%
Financial and Business	8%	10%	13%	10%	11%
Public Service/Facilities	3%	3%	6%	4%	4%
Pubs and Bars	1%	3%	4%	1%	3%
Closed/Vacant	11%	9%	10%	16%	11%
Renovation	1%	2%	2%	0%	1%
Grand Total	**100%**	**100%**	**100%**	**100%**	**100%**

Percentage of trading units in protected frontages by retail category

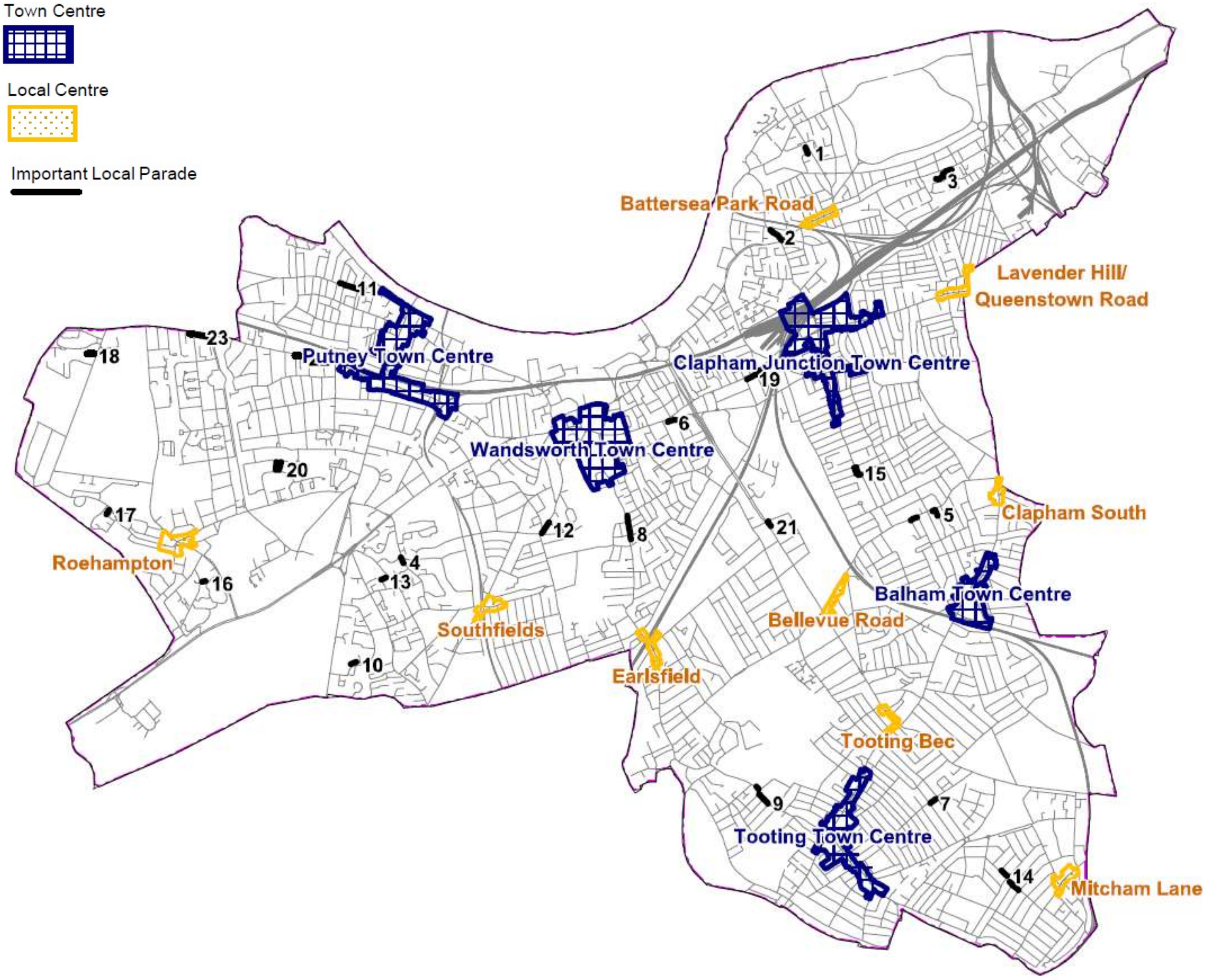


Change in Percentage of trading units in protected frontages by retail category – 2020 to 2021

Frontage	Convenience Retailer	Services	Durable/ Non-food	Financial & Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
Core	-1.9%	1.9%	-1.2%	-0.7%	0.7%	0.3%	0.7%
Secondary	0.2%	0.9%	-0.6%	-0.1%	3.0%	-0.5%	-0.5%
Other	0.0%	0.8%	-1.4%	-0.3%	1.8%	-1.2%	0.3%
ILP	0.5%	1.5%	-1.1%	-2.7%	1.2%	-0.3%	2.1%
Total	0.7%	1.2%	-0.9%	-0.1%	1.8%	-0.4%	0.4%

10. Town Centres

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



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

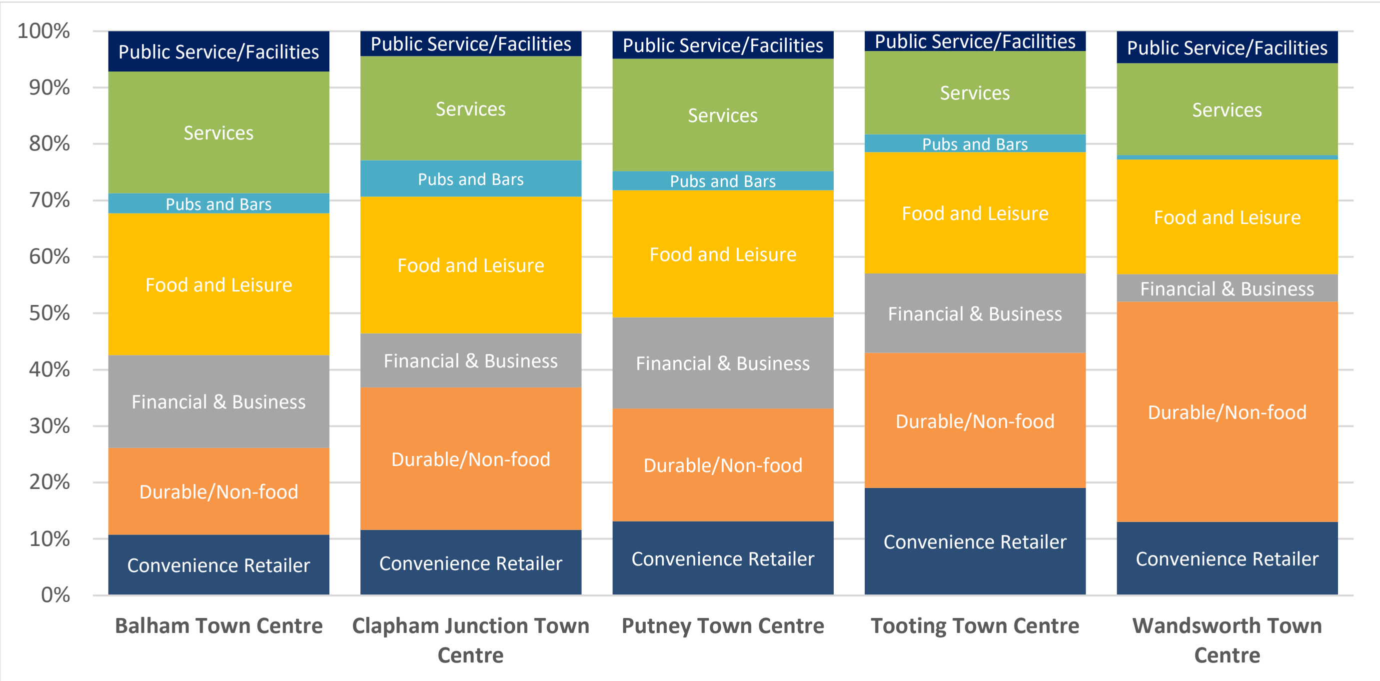
11. Town Centre - Retail Categories

The table and charts 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 a large number 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.

Percentage of trading units in Town Centres by retail category

Town Centre	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
Balham	10%	21%	16%	17%	25%	4%	7%
Clapham Junction	12%	19%	25%	10%	24%	7%	4%
Putney	13%	20%	20%	16%	23%	3%	5%
Tooting	19%	15%	24%	14%	21%	3%	4%
Wandsworth	13%	16%	39%	5%	20%	1%	6%
Total	14%	18%	24%	13%	23%	4%	5%

Percentage of trading units in Town Centres by retail category



12. Changes in Retail Categories between 2020 - 2021

There have been minor changes in comparison with the retail categories recorded in 2020 as the table below illustrates. However, it is notable that there were decreases in the number of Durable/Non-food units in Putney and Tooting. Wandsworth saw an increase in Durable/Non-food units, which was offset by a decrease in Convenience and Food and Leisure units. The apparent reduction in Pubs and Bars in Tooting was due to Broadway Market not being surveyed in 2021.

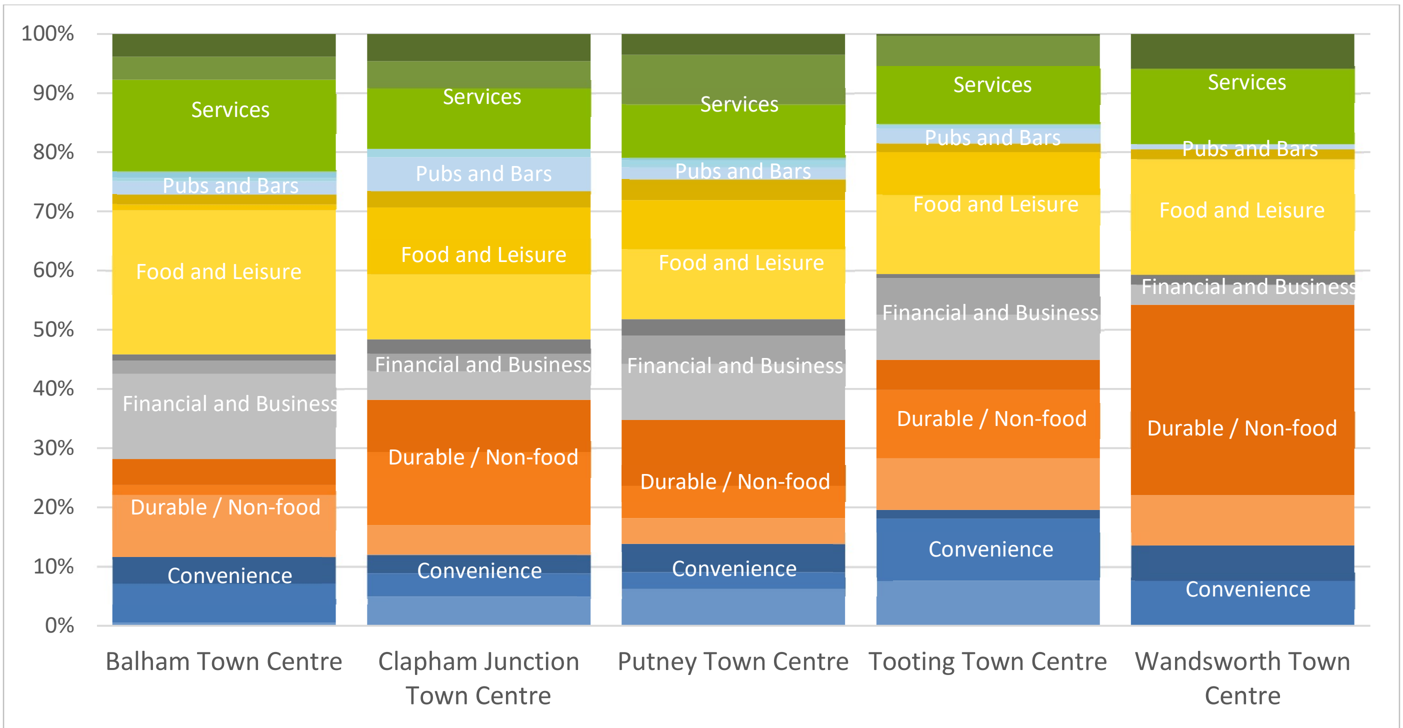
Change in Percentage of trading units in Town Centres by retail category – 2021 compared to 2020

Town Centre	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
Balham	-0.2%	1.8%	-0.5%	-2.3%	2.1%	0.3%	-1.1%
Clapham Junction	-1.4%	0.7%	1.7%	-1.0%	1.0%	-1.4%	0.3%
Putney	1.9%	-0.6%	-3.3%	0.7%	2.0%	-0.5%	-0.2%
Tooting	0.7%	0.9%	-3.0%	1.9%	0.9%	-2.4%	1.0%
Wandsworth	-2.0%	2.9%	3.6%	-1.4%	-3.3%	-0.8%	1.0%
Total	-0.3%	1.1%	-1.1%	0.0%	1.0%	-1.1%	0.4%

13. Town Centre retail categories by frontage

The chart below illustrates the spread of retail categories in each Town Centre by frontage, showing that the protected Core Shopping frontages in the darker colours often have a markedly different range of uses when compared to the Secondary Shopping and protected Other frontages further from the centres.

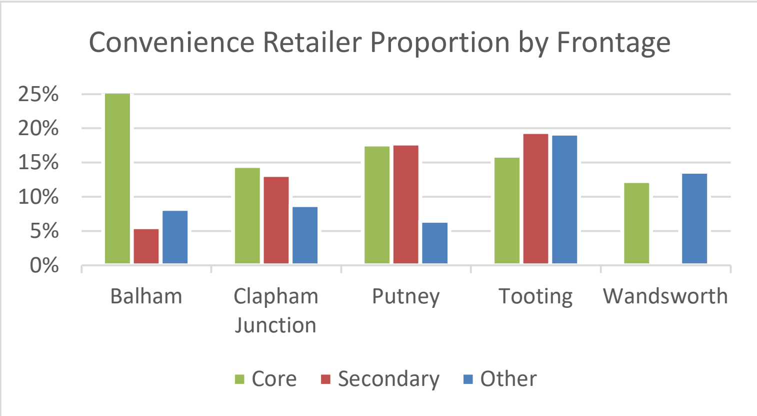
Percentage of trading units in Town Centres by retail category and frontage



14. Town Centres – Retail Categories by Frontage

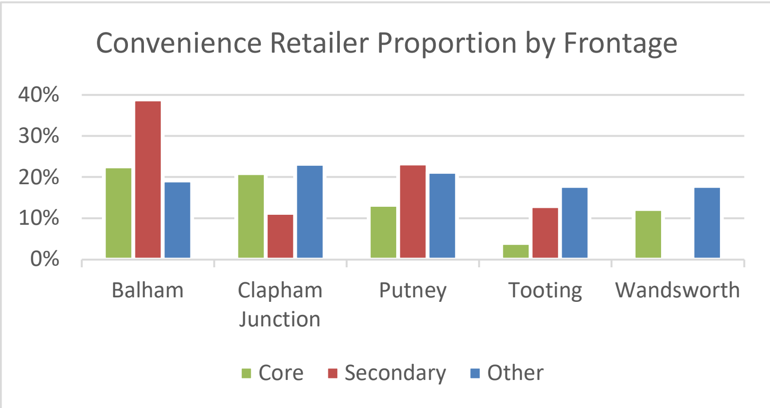
Town Centres – Convenience Retailers

	Core	Secondary	Other
Balham	26%	6%	8%
Clapham Junction	15%	13%	9%
Putney	18%	18%	6%
Tooting	16%	19%	19%
Wandsworth	12%	0%	14%



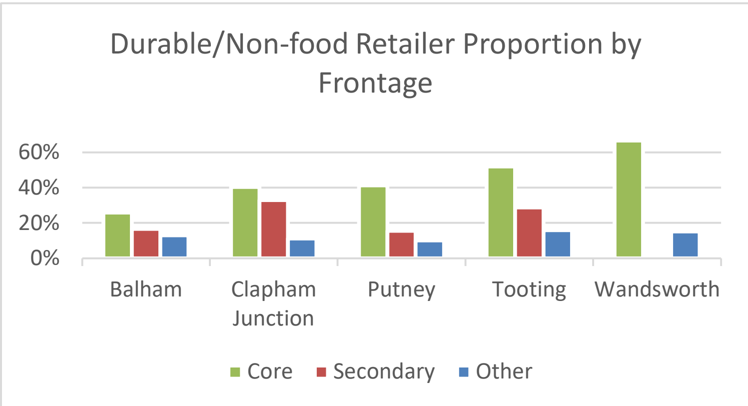
Town Centres – Services

	Core	Secondary	Other
Balham	23%	39%	19%
Clapham Junction	21%	11%	23%
Putney	13%	23%	21%
Tooting	4%	13%	18%
Wandsworth	12%	0%	18%



Town Centres – Durable/Non-food

	Core	Secondary	Other
Balham	26%	17%	13%
Clapham Junction	40%	33%	11%
Putney	41%	16%	10%
Tooting	52%	29%	16%
Wandsworth	67%	0%	15%



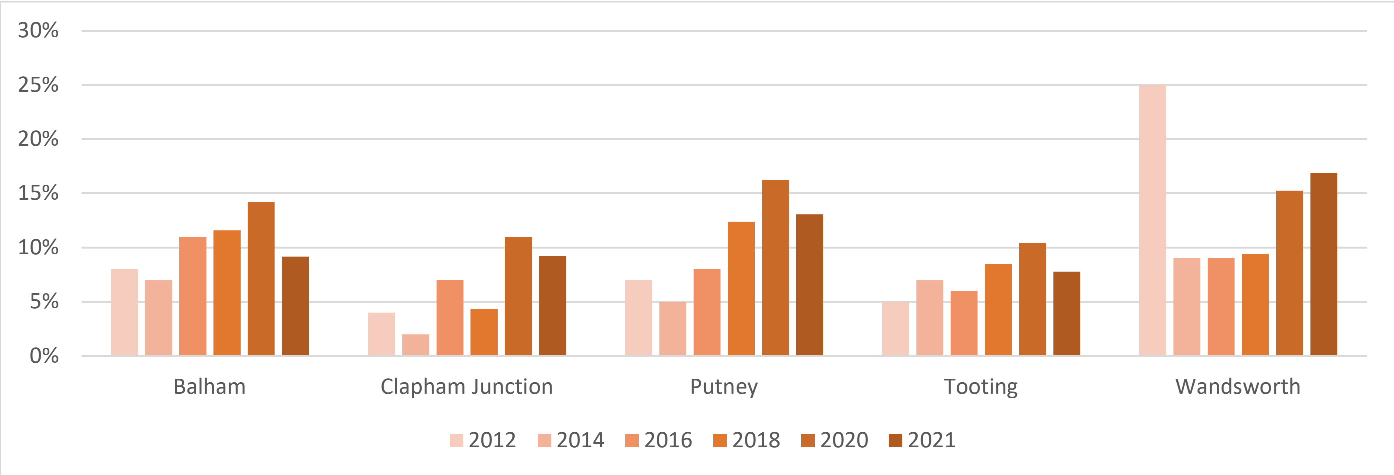
15. Town Centres – Summary of Vacancies

The table and chart below show the change in the percentage of vacant units in each of the Town Centres between 2008 and 2021. These are described in greater detail in the individual Town Centre sections of this report, but they show that vacancy rates have decreased in all town centres, except Wandsworth, with some variation between each Town Centre.

Number of Units and Percentage of Vacant Units by Town Centre (2012 - 2021)

Town Centre	2012		2014		2016		2018		2020		2021	
	No Units	% Vacant	No Units	% Vacant	No Units	% Vacant	No Units	% Vacant	No Units	% Vacant	No Units	% Vacant
Balham	212	8%	209	7%	214	11%	216	12%	217	14%	218	9%
Clapham Jctn	334	4%	323	2%	322	7%	324	4%	328	11%	325	9%
Putney	315	7%	307	5%	306	8%	307	12%	308	16%	306	13%
Tooting	432	5%	430	7%	450	6%	448	8%	403	10%	309	8%
Wandsworth	170	25%	144	9%	143	9%	149	9%	151	15%	148	17%
Total	**1,463**	**8%**	**1,413**	**6%**	**1,435**	**8%**	**1,443**	**9%**	**1,407**	**13%**	**1,306**	**11%**

Percentage of Vacant Units by Town Centre (2012 - 2021)



16. Change in Vacant Units - 2020 – 2021

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 2020 and 2021 but may have been occupied by a successful business in the intervening period.

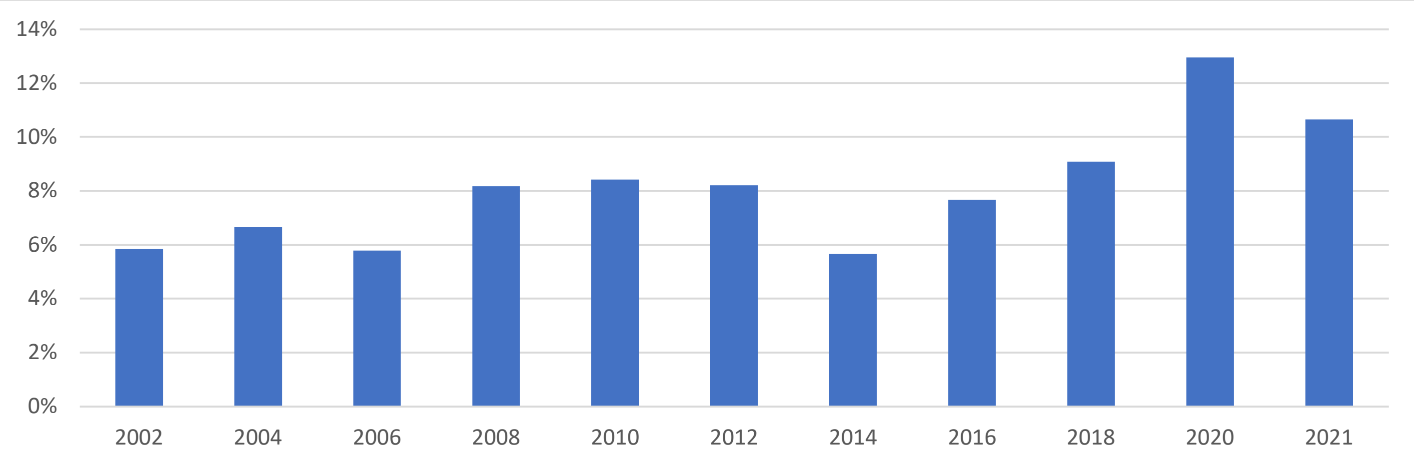
A total of 139 units were recorded as vacant/closed Town Centres in 2021, of which 21 were undergoing renovation or construction work. 78 of the 139 vacant units were also recorded as vacant in 2020. Of the 139 vacant units the largest proportion of previous uses in 2020 were 10 Durable/Non-food units and 12 Financial & Business and 12 Food and Leisure units.

17. Town Centres – Vacancies by Frontage

The town centres vary in size and have largely retained their level of retail use and low vacancy rates. The total number of units across all the protected frontages shows little change over the longer term. The overall vacancy rate has decreased from 13% in 2020 to 11% in 2021. This decrease is most pronounced in Secondary and Other frontages which decreased by 3% vacancy rate. These decreases have returned to just above the average for Secondary frontages, but still remain 3% above the average for Core and Other frontages. Note: Tooting and Broadway Markets were not surveyed in 2021.

Vacant Units by year - Town Centres (All frontages)

	2002	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	1404	1441	1453	1445	1462	1464	1413	1435	1443	1406	1306	1425
Vacant Units	82	96	84	118	123	120	80	110	131	183	139	115
Vacancy Rate	6%	7%	6%	8%	8%	8%	6%	8%	9%	13%	11%	8%



Vacant Units by year - Town Centres (Core frontages)

	2002	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	259	273	276	275	307	308	282	278	277	279	275	281
Vacant Units	15	9	7	14	36	41	15	18	29	36	31	23
Vacancy Rate	6%	3%	3%	5%	12%	13%	5%	6%	10%	13%	11%	8%

Vacant Units by year - Town Centres (Secondary frontages)

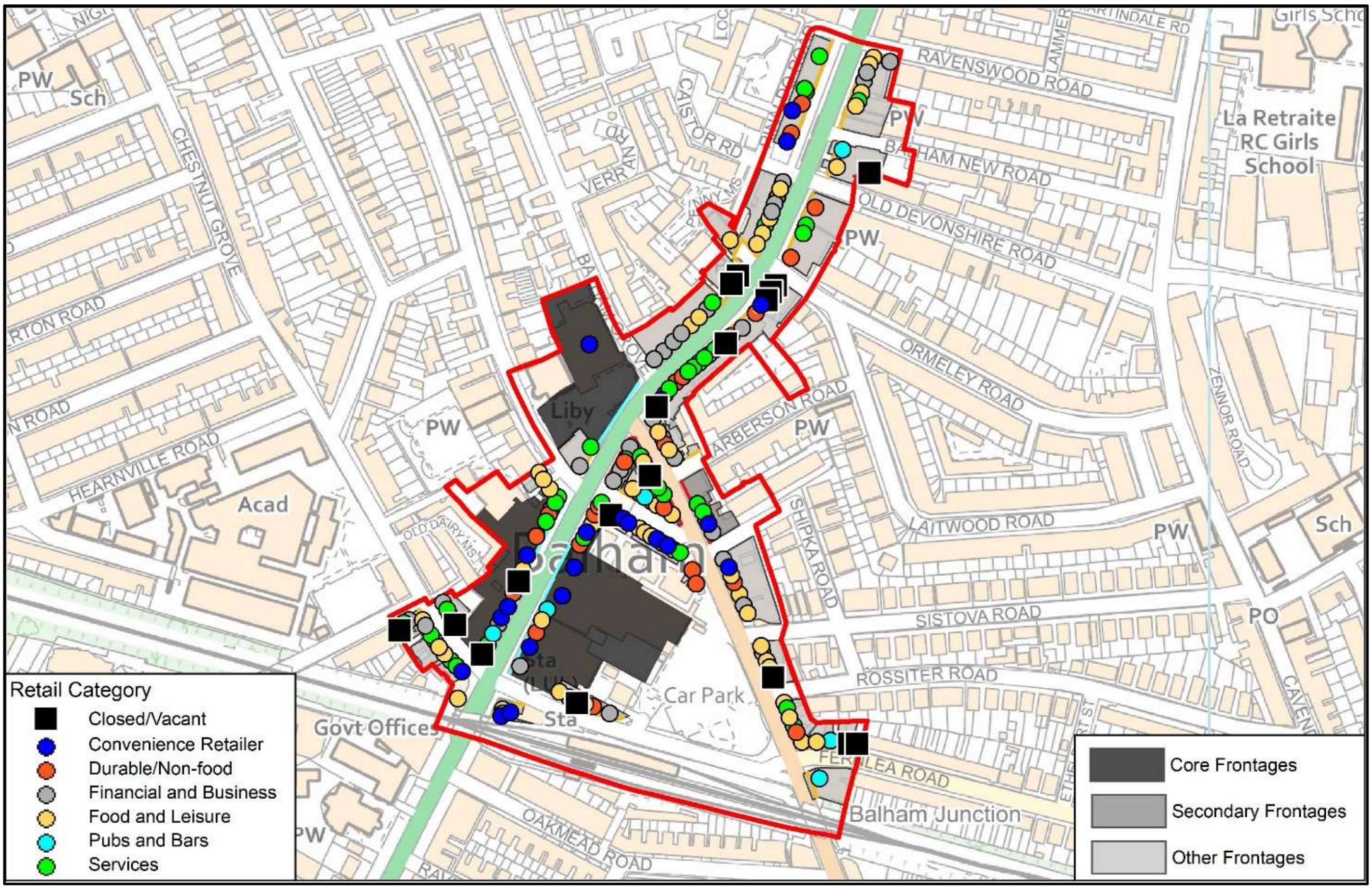
	2002	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	368	371	371	367	373	351	337	357	354	359	354	360
Vacant Units	26	33	28	26	29	18	12	24	26	42	32	27
Vacancy Rate	7%	9%	8%	7%	8%	5%	4%	7%	7%	12%	9%	7%

Vacant Units by year - Town Centres (Other frontages)

	2002	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	777	797	806	803	782	805	794	800	812	768	677	784
Vacant Units	41	54	49	78	58	61	53	68	76	104	76	65
Vacancy Rate	5%	7%	6%	10%	7%	8%	7%	9%	9%	14%	11%	8%

18. Balham Town Centre - Headline results

The combined vacancy rate in Balham Town Centre (all uses) had remained steady since at least 2004 - generally between 7-8%, and in 2021 had returned to the average of 9% following the higher 14% rate in 2020. There was a significant drop in the number of vacant units in the Other frontages, falling from 15% to 10%.

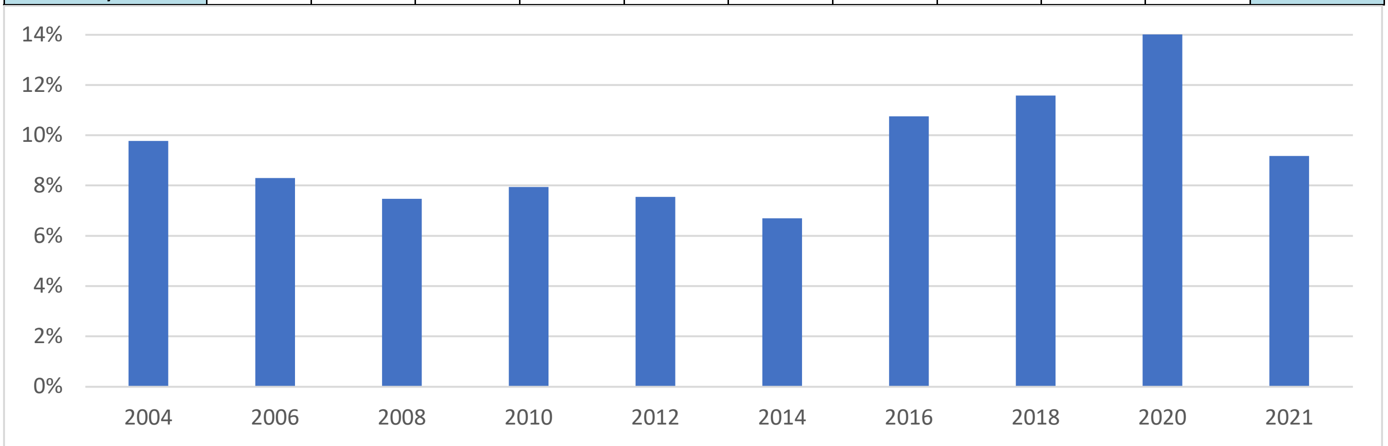


19. Balham Town Centre – Vacancies by Frontage

- There were 20 vacancies in Balham Town Centre of which 6 were newly vacant.
- 14 units recorded as vacant/closed in 2020 were again recorded as vacant/closed in 2021
- The majority of vacant units were in Other protected frontages

Vacant Units by year (All designated frontages)

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



Vacant Units by year (Core frontages)

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

Vacant Units by year (Secondary frontages)

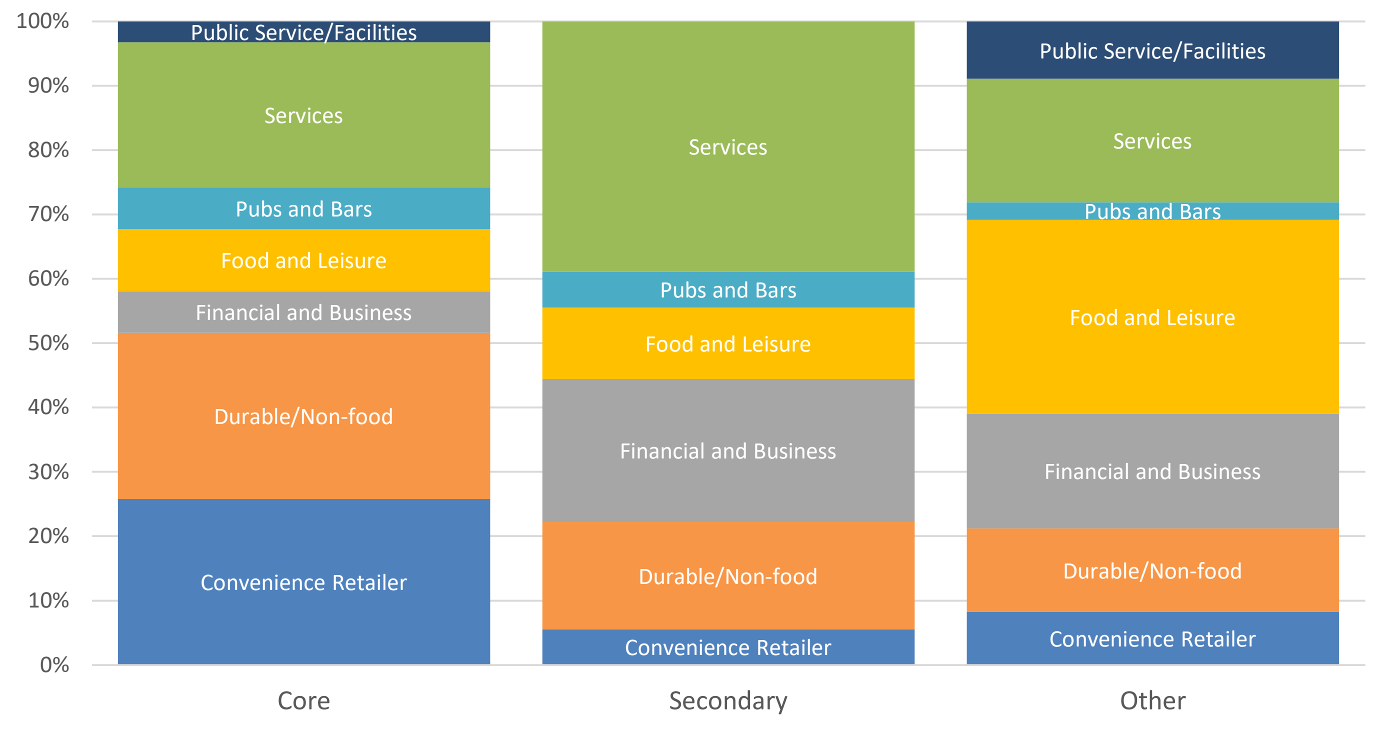
	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	67	67	67	38	38	21	20	20	20	20	40
Vacant Units	8	4	4	4	3	0	0	0	2	2	3
Vacancy Rate	12%	6%	6%	11%	8%	0%	0%	0%	10%	10%	7%

Vacant Units by year (Other frontages)

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	116	117	114	143	140	155	161	163	165	165	142
Vacant Units	13	13	12	12	11	12	23	21	25	16	16
Vacancy Rate	11%	11%	11%	8%	8%	8%	14%	13%	15%	10%	11%

20. Balham Town Centre – Retail Categories

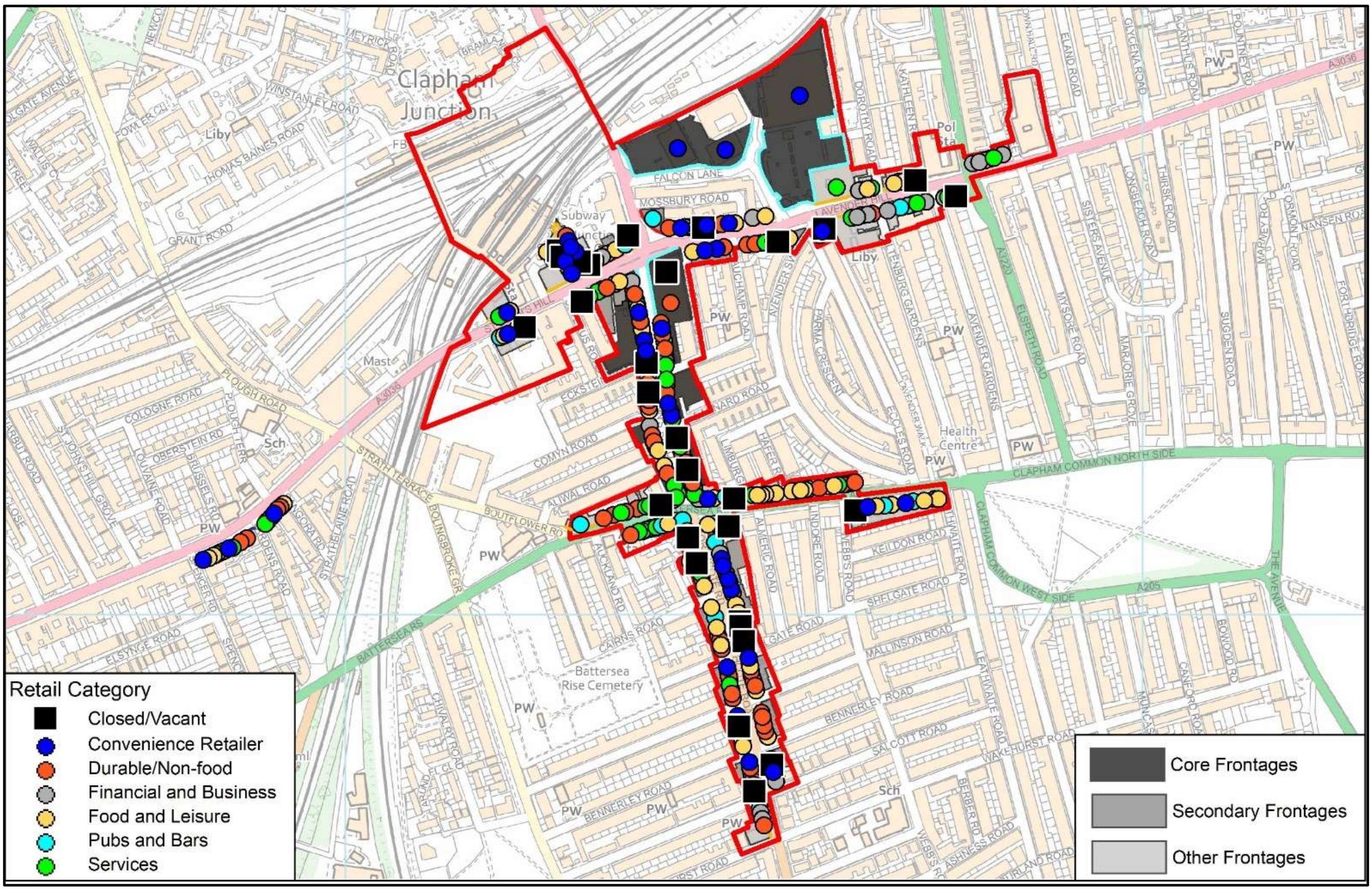
Frontage	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	26%	26%	6%	10%	6%	23%	3%
Secondary	6%	17%	22%	11%	6%	39%	0%
Other	8%	13%	18%	30%	3%	19%	9%
Grand Total	**11%**	**15%**	**16%**	**25%**	**4%**	**22%**	**7%**



21. Clapham Junction Town Centre - Headline results

The combined vacancy rate in Clapham Junction Town Centre (all frontages) had remained consistently low between 2004 to 2018 - generally between 2-5%. The 9% vacancy rate in 2021 is slightly below the 11% rate in 2020. There was a 2% decrease in the vacancy rate in the Core and Other frontages and a 1% decrease in the Secondary Frontages.

The retail performance of individual parades varies widely and may be a function of rental/business rate differentials, footfall, or the types of uses occupied.

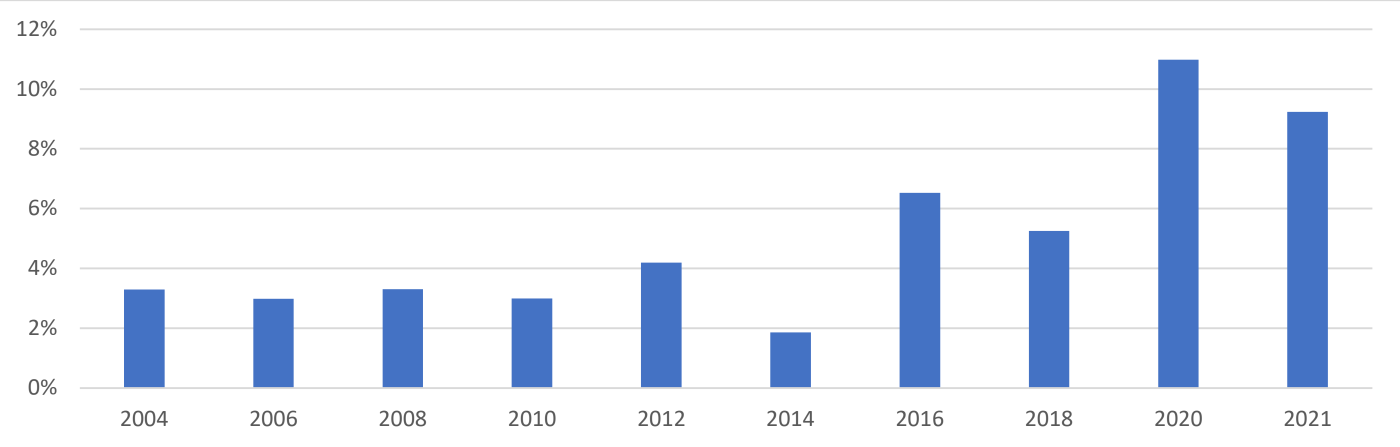


22. Clapham Junction Town Centre – Vacancies by Frontage

- There were 30 vacant units in Clapham Junction Town Centre, which is a slight reduction on the 36 vacancies in 2020, but still above the average of 17.
- 13 of these 30 vacant units were newly vacant, including a bank and national non-food chain store closures
- 15 of the vacant units were also recorded as vacant in the 2020 survey, no vacant units have remained vacant since the 2018 survey
- Northcote Road had 9 vacant units and St Johns Hill recorded 6 vacant units, 3 of which were in the Junction Shopping Centre

Vacant Units by year (All designated frontages)

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



Vacant Units by year (Core frontages)

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

Vacant Units by year (Secondary frontages)

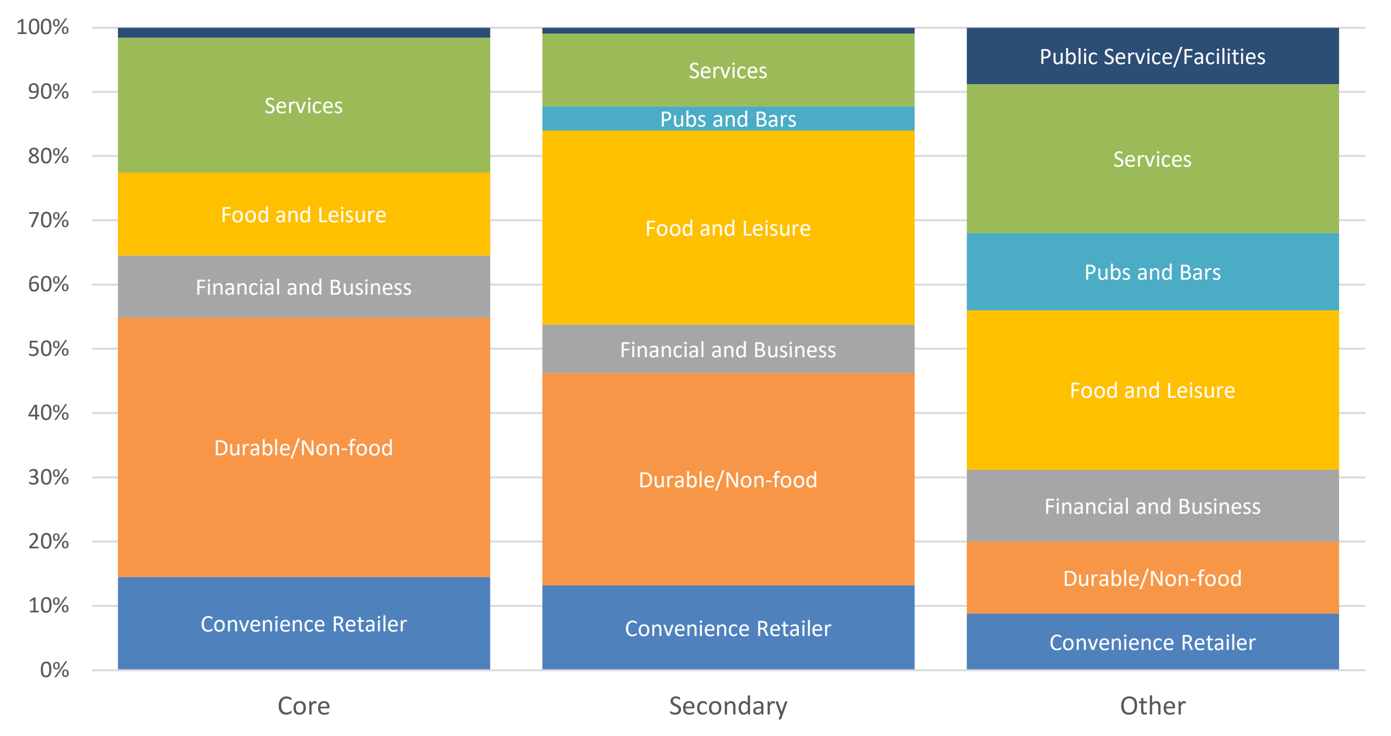
	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	76	77	76	93	93	100	116	117	119	119	99
Vacant Units	4	5	3	4	4	0	9	7	14	13	6
Vacancy Rate	5%	6%	4%	4%	4%	0%	8%	6%	12%	11%	6%

Vacant Units by year (Other frontages)

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

23. Clapham Junction Town Centre - Retail Categories

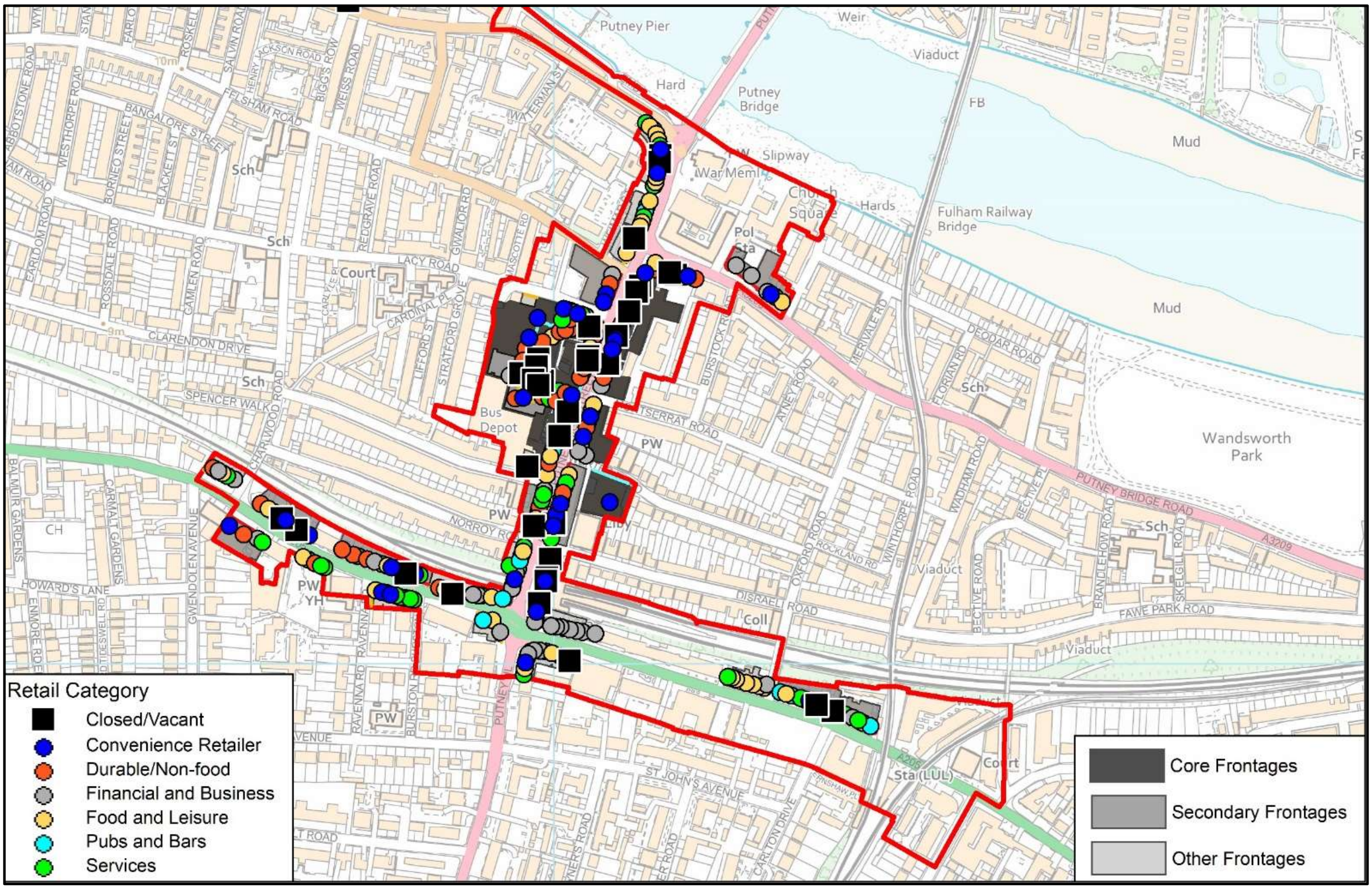
	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	15%	40%	10%	13%	0%	21%	2%
Secondary	13%	33%	8%	30%	4%	11%	1%
Other	9%	11%	11%	25%	12%	23%	9%
Total	**12%**	**25%**	**10%**	**24%**	**6%**	**18%**	**4%**



24. Putney Town Centre – Headline Results

The total number of vacant units in all frontages in Putney Town Centre has decreased by 10 units since 2020. This follows increases in the number of additional vacancies recorded between 2016 and 2020.

Core frontages saw the same number of vacancies in 2020 and 2021, but Secondary Frontages had 4 fewer vacancies and Other frontages fell to an 8% vacancy rate which is close to the average of 7%.

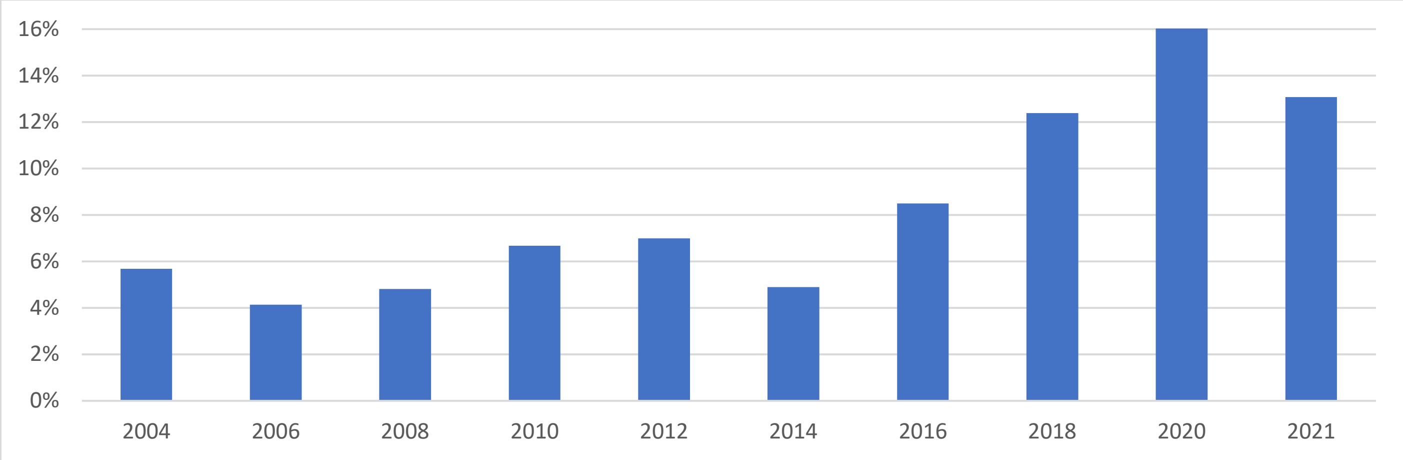


25. Putney Town Centre – Vacancies by Frontage

- There were 40 vacancies in Putney Town Centre of which 19 were newly vacant.
- These included 9 Durable/Non-food units and 5 Financial Services units that were newly vacant.
- 21 vacant units remained unoccupied from 2020, with 8 in the core and 9 in the secondary frontages.
- Putney Exchange Shopping Centre had 7 vacant units; the same number as recorded in 2020.

Vacant Units by year (All designated frontages)

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	317	315	312	315	315	307	306	307	308	306	311
Vacant Units	18	13	15	21	22	15	26	38	50	40	26
Vacancy Rate	6%	4%	5%	7%	7%	5%	8%	12%	16%	13%	8%



Vacant Units by year (Core frontages)

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

Vacant Units by year (Secondary frontages)

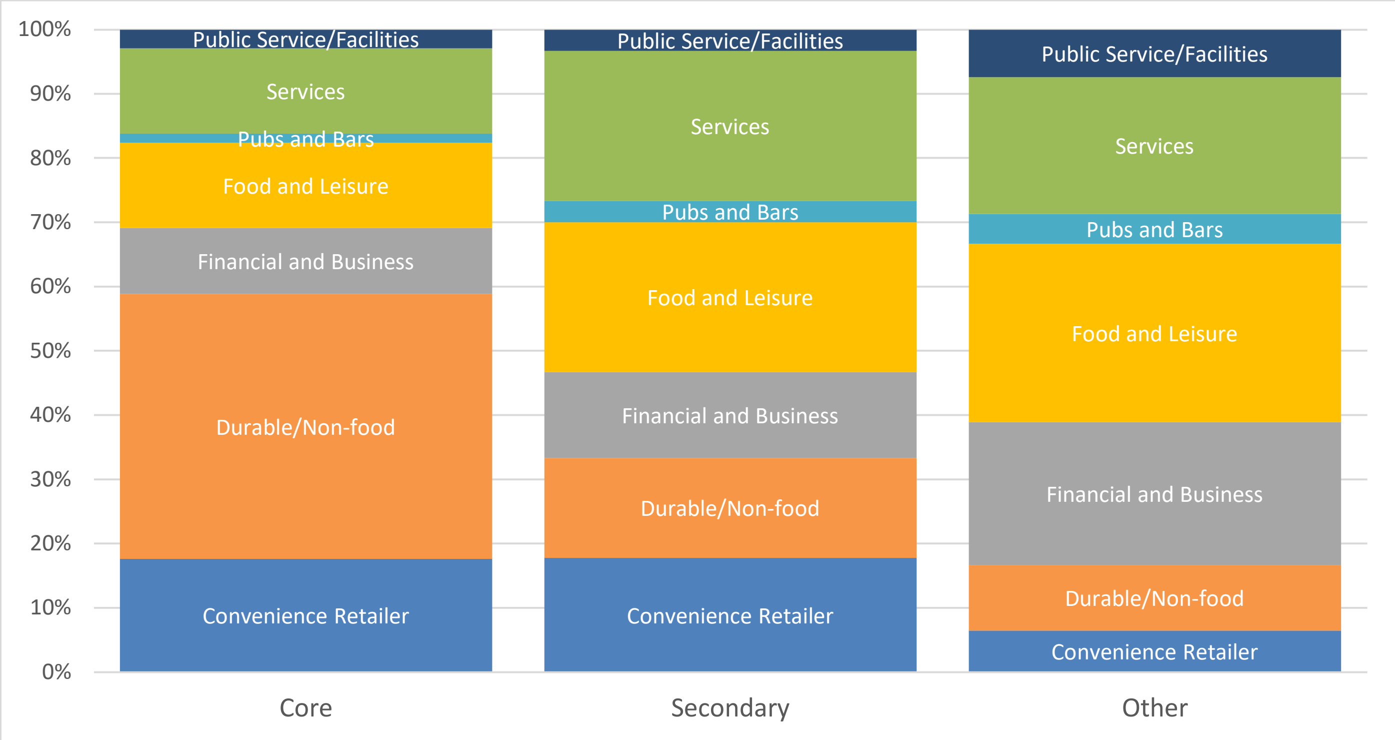
	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	103	102	100	107	107	105	107	106	107	105	105
Vacant Units	6	5	5	7	5	7	9	13	19	15	9
Vacancy Rate	6%	5%	5%	7%	5%	7%	8%	12%	18%	14%	9%

Vacant Units by year (Other frontages)

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

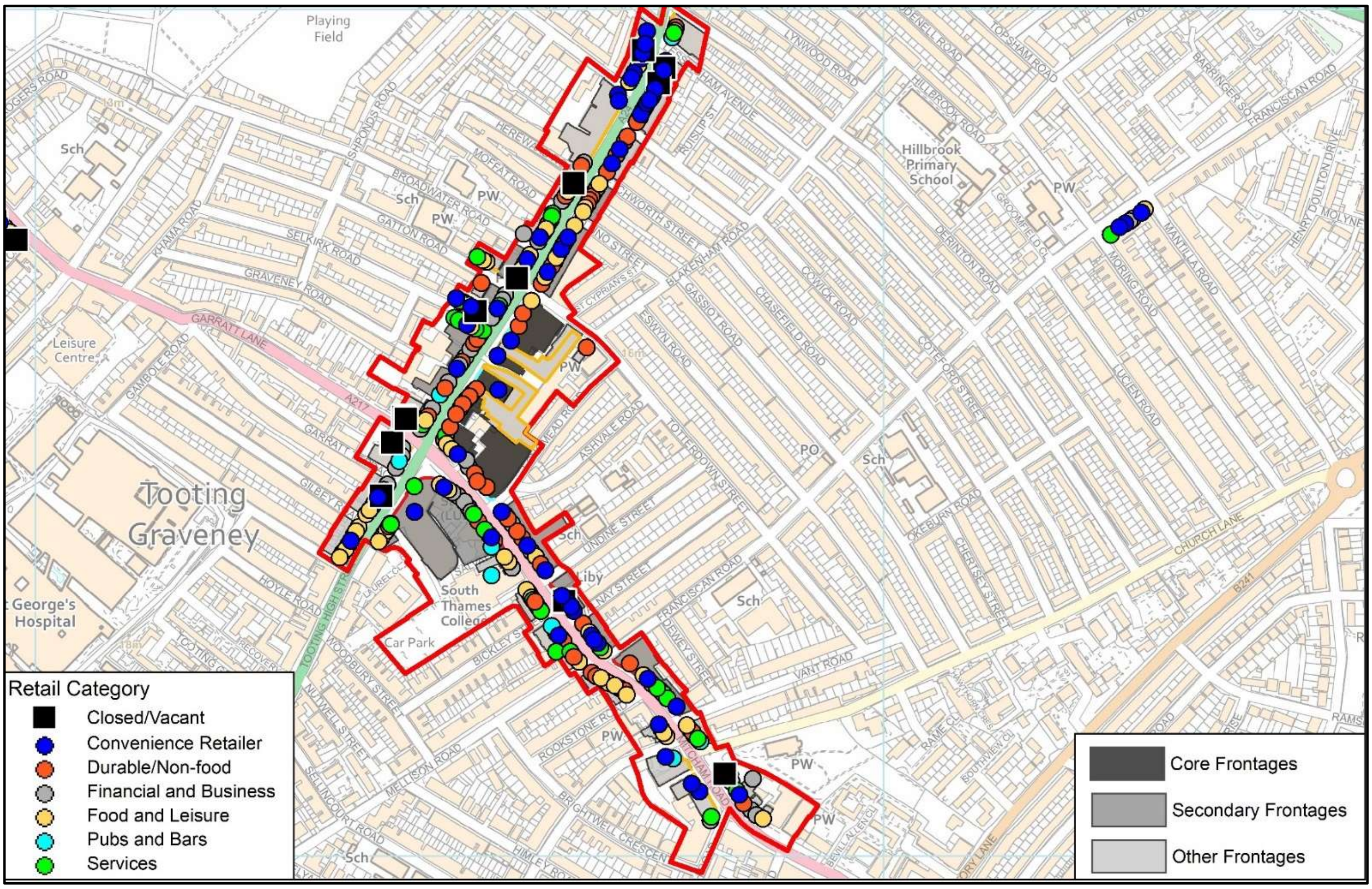
26. Putney Town Centre - Retail Categories

	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	18%	41%	10%	13%	1%	13%	3%
Secondary	18%	16%	13%	23%	3%	23%	3%
Other	6%	10%	22%	28%	5%	21%	7%
Total	**13%**	**20%**	**16%**	**23%**	**3%**	**20%**	**5%**



27. Tooting Town Centre – Headline Results

The vacancy rate in Tooting Town Centre has reduced from 10% in 2020 to 8% in 2021. The combined vacancy rate (all frontages) has remained consistently low since 2004 - generally between 3-7%. Vacant units on Core frontages remain unchanged and there was a decrease of five units in Secondary Frontages which resulted in the lowest number of vacancies recorded in Secondary Frontages since 2004. The 21 vacant units in Other Frontages included 9 units at 180-218 Upper Tooting Road which were under construction. If these are excluded, the vacancy rate would be around the average of 7%. The total number of units in Other frontages was lower than previously recorded as Tooting Market was not surveyed in 2020 and Tooting and Broadway Markets were not surveyed in 2021.

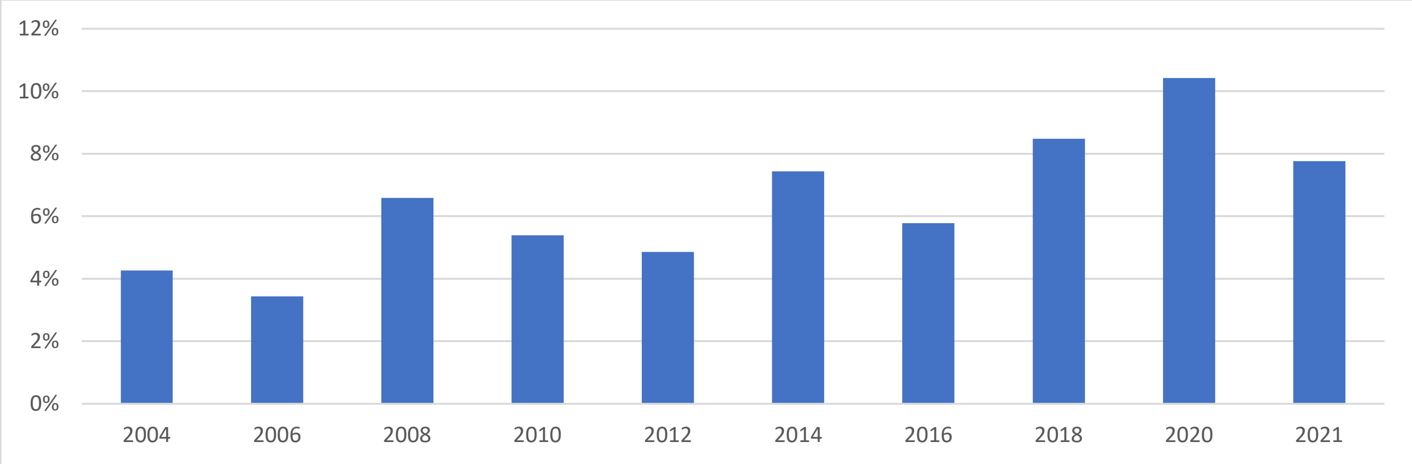


28. Tooting Town Centre – Vacancies by Frontage

- There were 24 vacancies in Tooting Town Centre of which 5 were newly vacant units.
- 2 Financial Services and 3 Clothes shops were newly vacant.
- 6 units recorded as Closed or Vacant in 2020 remained unoccupied in 2021.
- Newly occupied units included a large supermarket at the new development at 180 - 186 Upper Tooting Road
- The majority of vacant units were on Upper Tooting Road, with fewer vacancies on Mitcham Road.

Vacant Units by year (All designated frontages)

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	399	407	410	408	432	430	450	448	403	309	421
Vacant Units	17	14	27	22	21	32	26	38	42	24	27
Vacancy Rate	4%	3%	7%	5%	5%	7%	6%	8%	10%	8%	6%



Vacant Units by year (Core frontages)

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

Vacant Units by year (Secondary frontages)

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

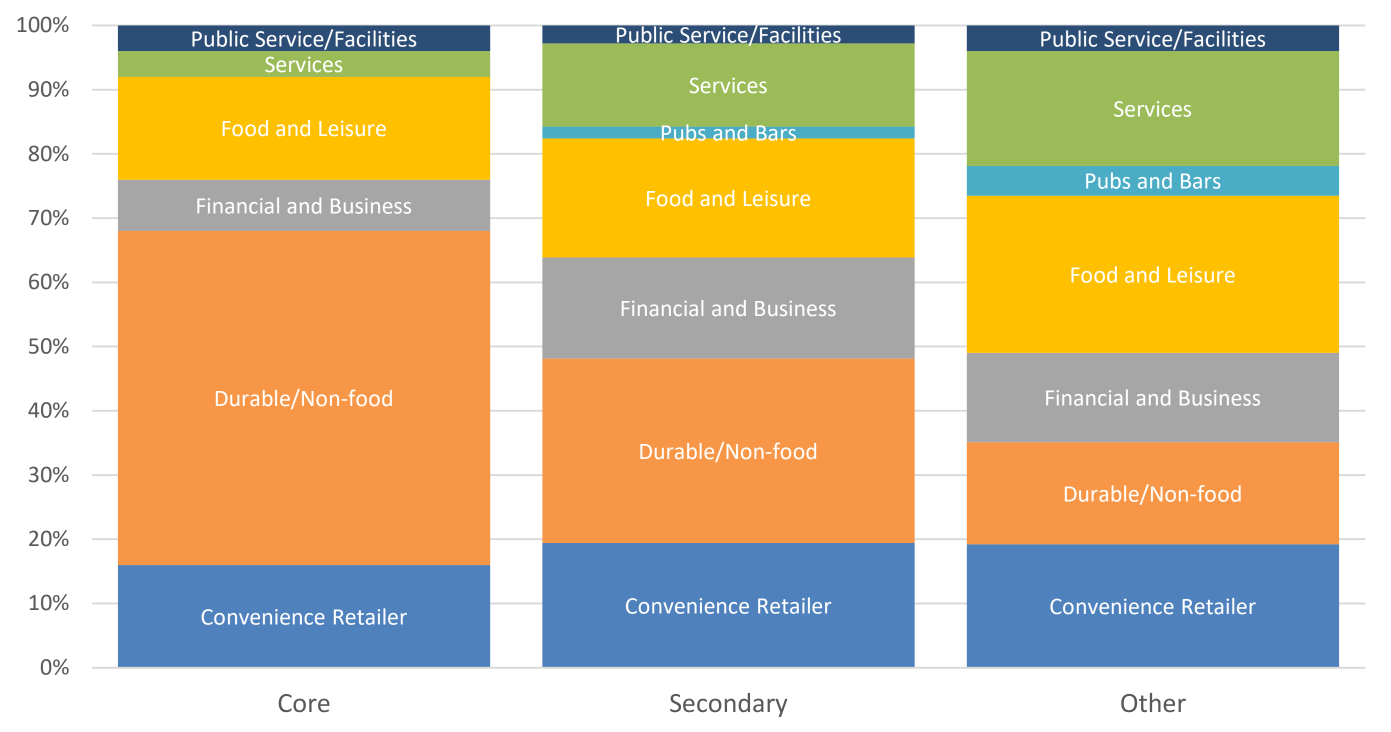
Vacant Units by year (Other frontages)

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021*	Average
Total Units	266	276	278	268	292	291	309	311	263	173	273
Vacant Units	12	9	18	16	14	26	19	31	34	21	22
Vacancy Rate	5%	3%	6%	6%	5%	9%	6%	10%	13%	12%	7%

*Excludes Tooting Market and Broadway Market

29. Tooting Town Centre – Retail Categories

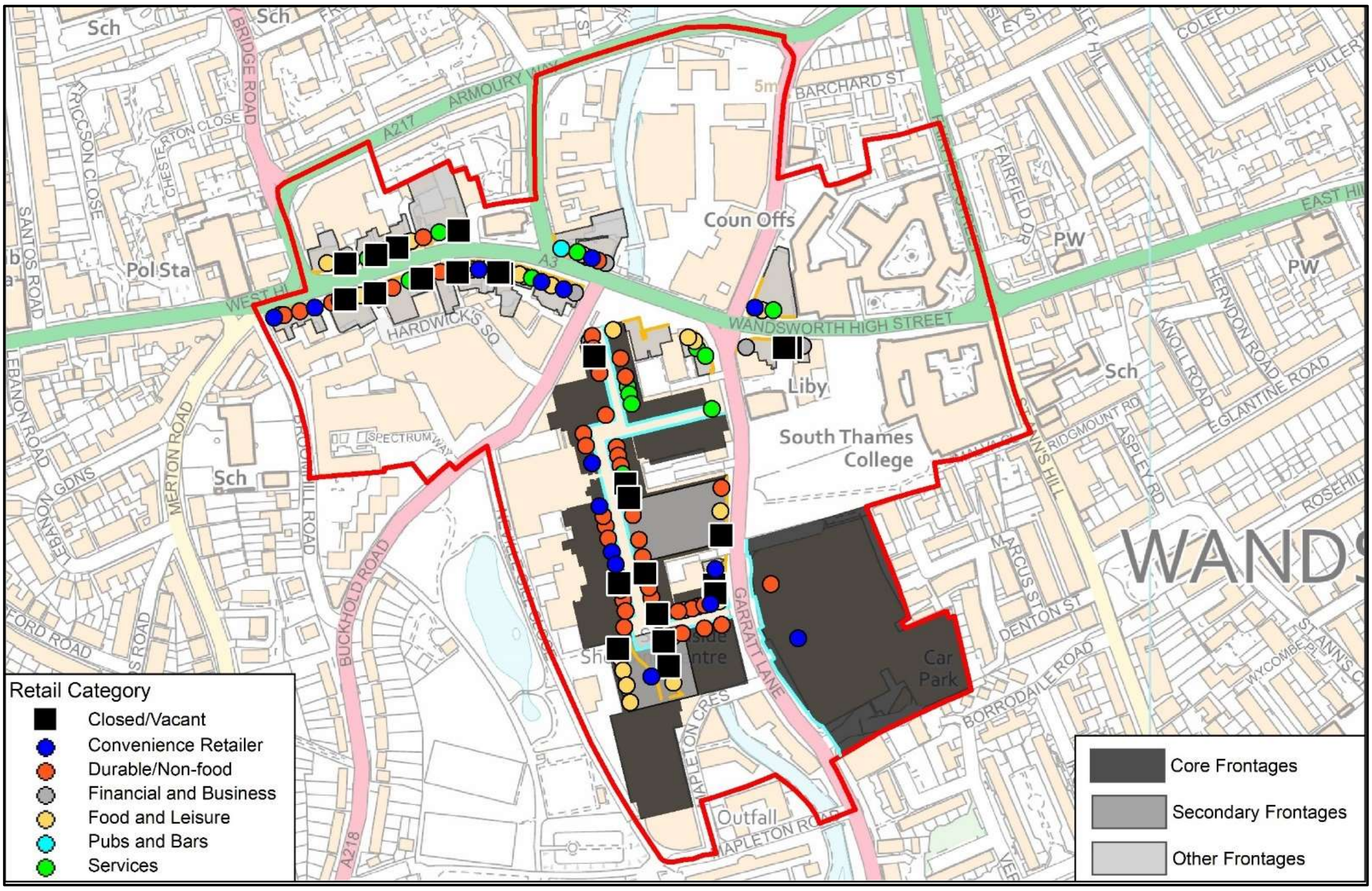
	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	16%	52%	8%	16%	0%	4%	4%
Secondary	19%	29%	16%	19%	2%	13%	3%
Other	19%	16%	14%	25%	5%	18%	4%
Total	**19%**	**24%**	**14%**	**21%**	**3%**	**15%**	**4%**



30. Wandsworth Town Centre – Headline Results

The combined vacancy rate in Core and Other frontages in Wandsworth Town Centre has increased slightly to 17%, compared to the 15% recorded in 2020. There were 25 units recorded as vacant or closed in 2021, which is 2 more than in 2020. Units in the Core Frontage saw a decrease from 14% to 11%, but Other frontages saw an increase from 16% in 2020 to 21% in 2021. 7 units were recorded as vacant or closed in Southside Shopping Centre out of a total of 64 units.

The protected frontages in Wandsworth Town Centre consist of Core Shopping frontages and protected Other frontages only; there are no Secondary frontages designated within Wandsworth Town Centre. Apart from Sainsbury's in Garratt Lane, all the Core Shopping frontages are entirely within the indoor Southside shopping centre. Regeneration over recent years has reconfigured the shopping centre and the units within it therefore it is not possible to make a direct comparison with previous years' survey results and vacancy rates in the recent past have reflected the complete remodelling of the interior. This is reflected in the total number of units in the protected frontages which has reduced markedly in recent years from 170 units in 2012, to 143 in 2016, with 150 units recorded in 2021 following newly created or subdivided units.

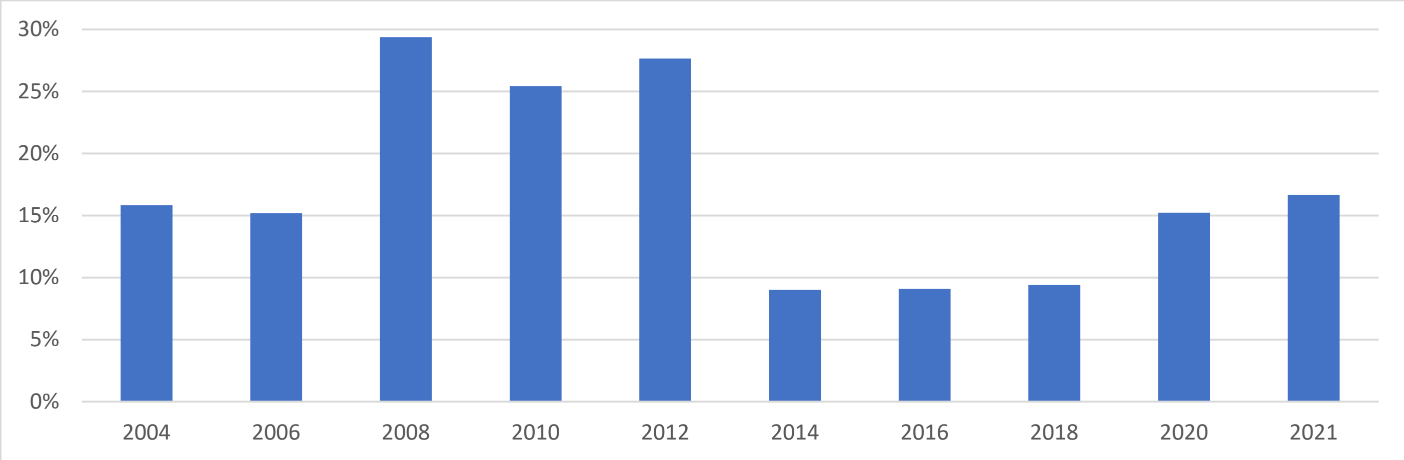


31. Wandsworth Town Centre – Vacancies by Frontage

- There were 25 vacancies in Wandsworth Town Centre of which 15 were newly vacant.
- Of the newly vacant unts, 6 were Food and Leisure units.

Vacant Units by year (All designated frontages)

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	177	178	177	169	170	144	143	149	151	150	161
Vacant Units	28	27	52	43	47	13	13	14	23	25	29
Vacancy Rate	16%	15%	29%	25%	28%	9%	9%	9%	15%	17%	18%



Vacant Units by year (Core frontages)

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	49	52	50	86	87	63	65	65	65	64	65
Vacant Units	5	3	6	23	28	5	5	3	9	7	9
Vacancy Rate	10%	6%	12%	27%	32%	8%	8%	5%	14%	11%	15%

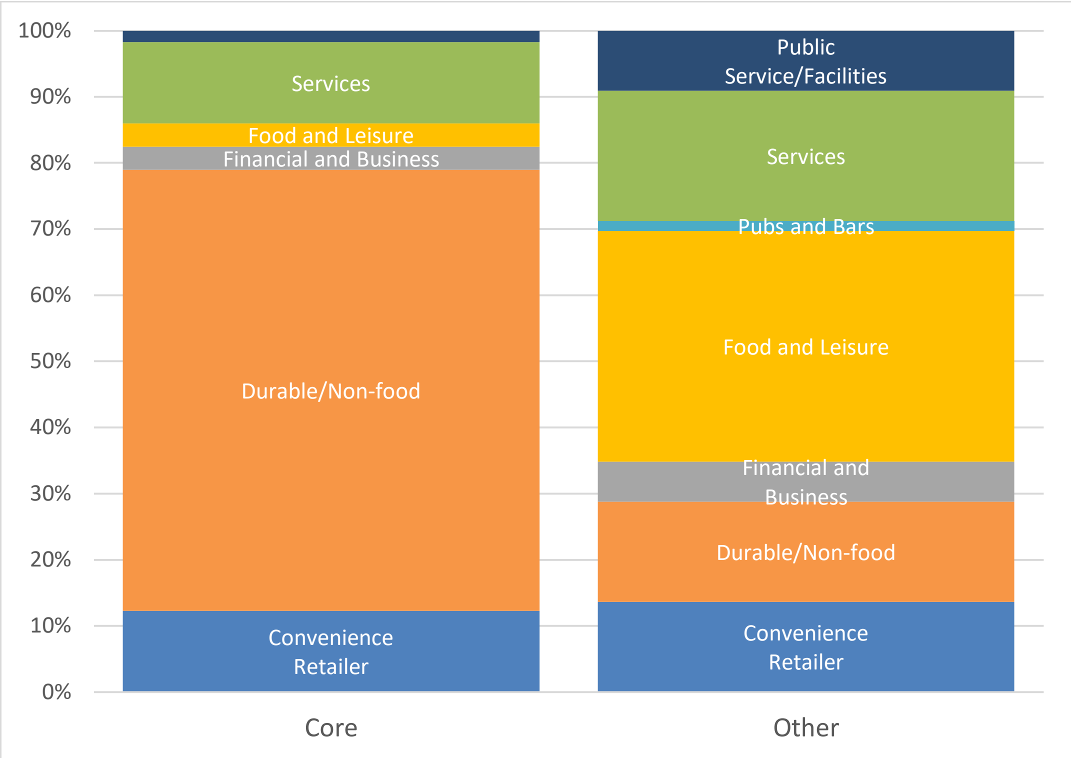
Vacant Units by year (Other frontages)

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	106	105	105	83	83	81	78	84	86	86	90
Vacant Units	14	17	36	20	19	8	8	11	14	18	17
Vacancy Rate	13%	16%	34%	24%	23%	10%	10%	13%	16%	21%	18%

32. Wandsworth Town Centre – Retail Categories

Percentage of trading units in Wandsworth Town Centre by retail category and 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	14%	15%	6%	35%	2%	20%	9%
Total	**13%**	**39%**	**5%**	**20%**	**1%**	**16%**	**6%**



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33. Local Centres – Headline Results

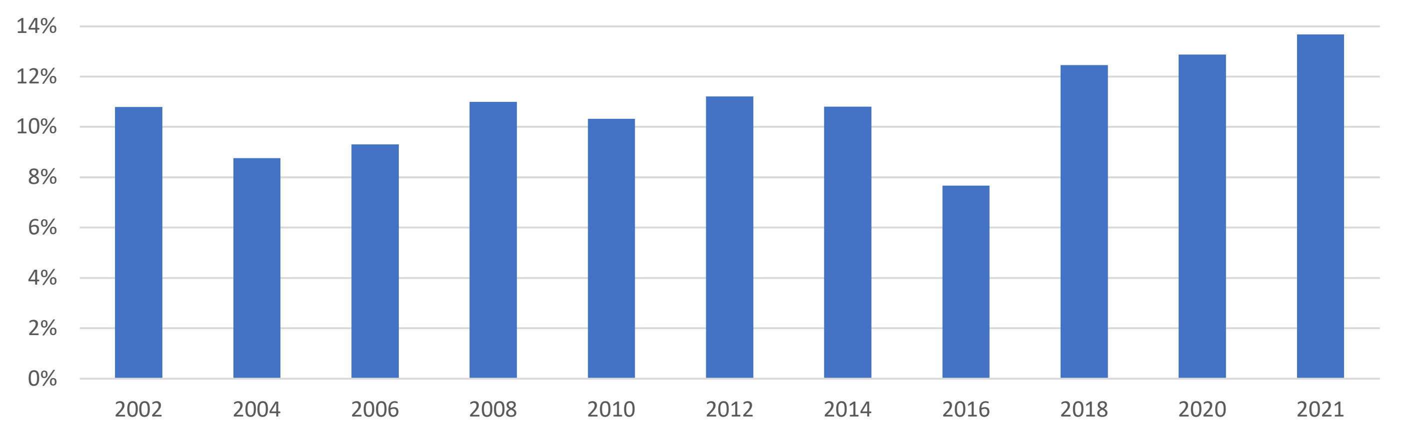
The vacancy rate in all Local Centres remains largely unchanged between 2020 and 2021 increasing from 13% to 14%. The vacancy rate has remained at consistent levels with increases in Core and Other frontages and a slight decrease in vacancies in Secondary frontages. Vacancies have been higher than the average for the last three surveys.

*Roehampton Local Centre was not surveyed in 2020

34. Local Centres – Vacancies by Frontage

Vacant Units by year (All designated frontages)

	2002	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	565	559	559	555	562	553	546	561	562	528	556	555
Vacant Units	61	49	52	61	58	62	59	43	70	68	76	58
Vacancy Rate	11%	9%	9%	11%	10%	11%	11%	8%	12%	13%	14%	11%



Vacant Units by year (Core frontages)

	2002	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	127	126	128	126	126	125	104	105	104	99	103	116
Vacant Units	14	9	10	9	12	13	11	5	12	11	15	11
Vacancy Rate	11%	7%	8%	7%	10%	10%	11%	5%	12%	11%	15%	10%

Vacant Units by year (Secondary frontages)

	2002	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	141	137	136	136	142	141	159	163	163	153	161	148
Vacant Units	15	13	17	18	14	16	19	10	21	25	22	17
Vacancy Rate	11%	9%	13%	13%	10%	11%	12%	6%	13%	16%	14%	12%

Vacant Units by year (Other frontages)

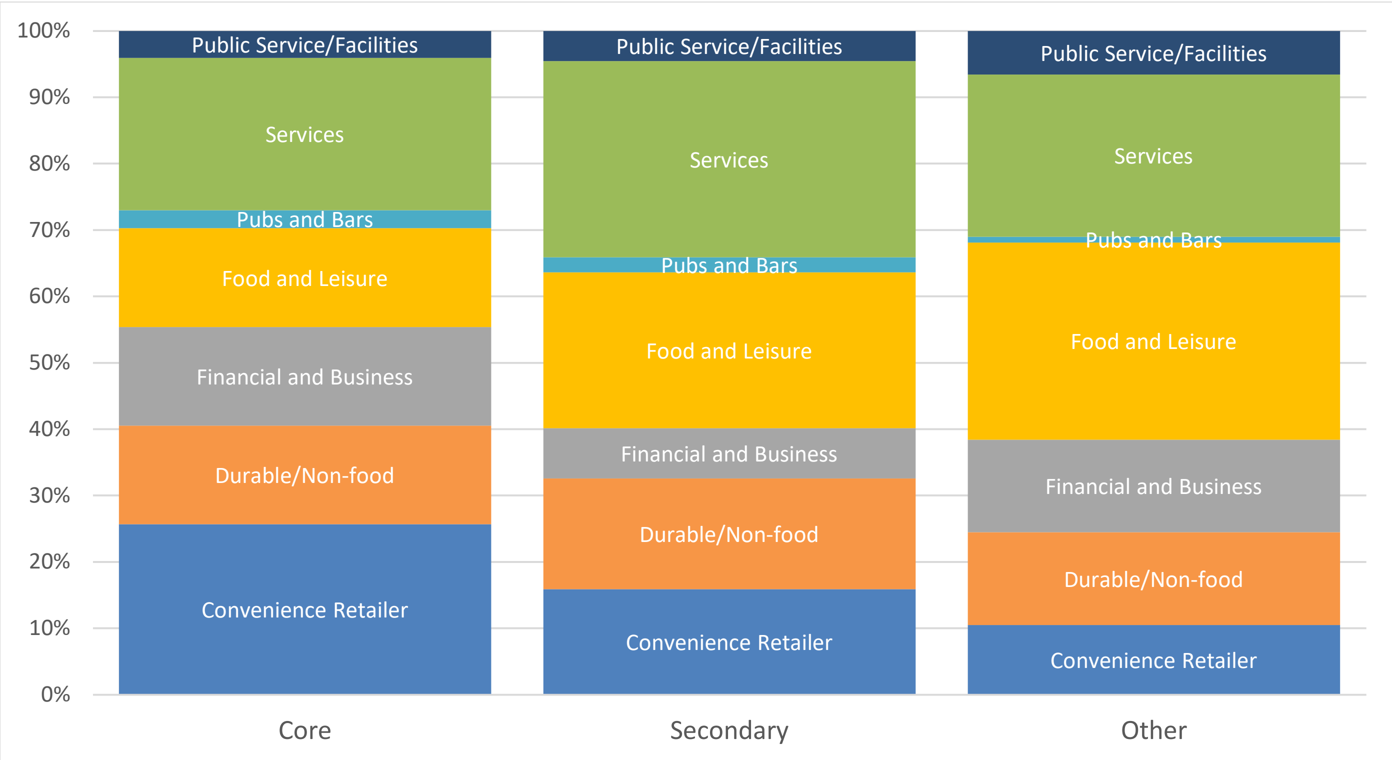
	2002	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	297	296	295	293	294	287	283	293	295	276	292	291
Vacant Units	32	27	25	34	32	33	29	28	37	32	39	31
Vacancy Rate	11%	9%	8%	12%	11%	11%	10%	10%	13%	12%	13%	11%

35. Local Centres – Retail Categories by Frontage

The table and chart below show the percentage of all units by retail category in the Local Centres frontages.

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

	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	26%	15%	15%	15%	3%	23%	4%
Secondary	16%	17%	8%	23%	2%	30%	5%
Other	10%	14%	14%	30%	1%	24%	7%
Total	**15%**	**15%**	**12%**	**25%**	**1.6%**	**26%**	**6%**

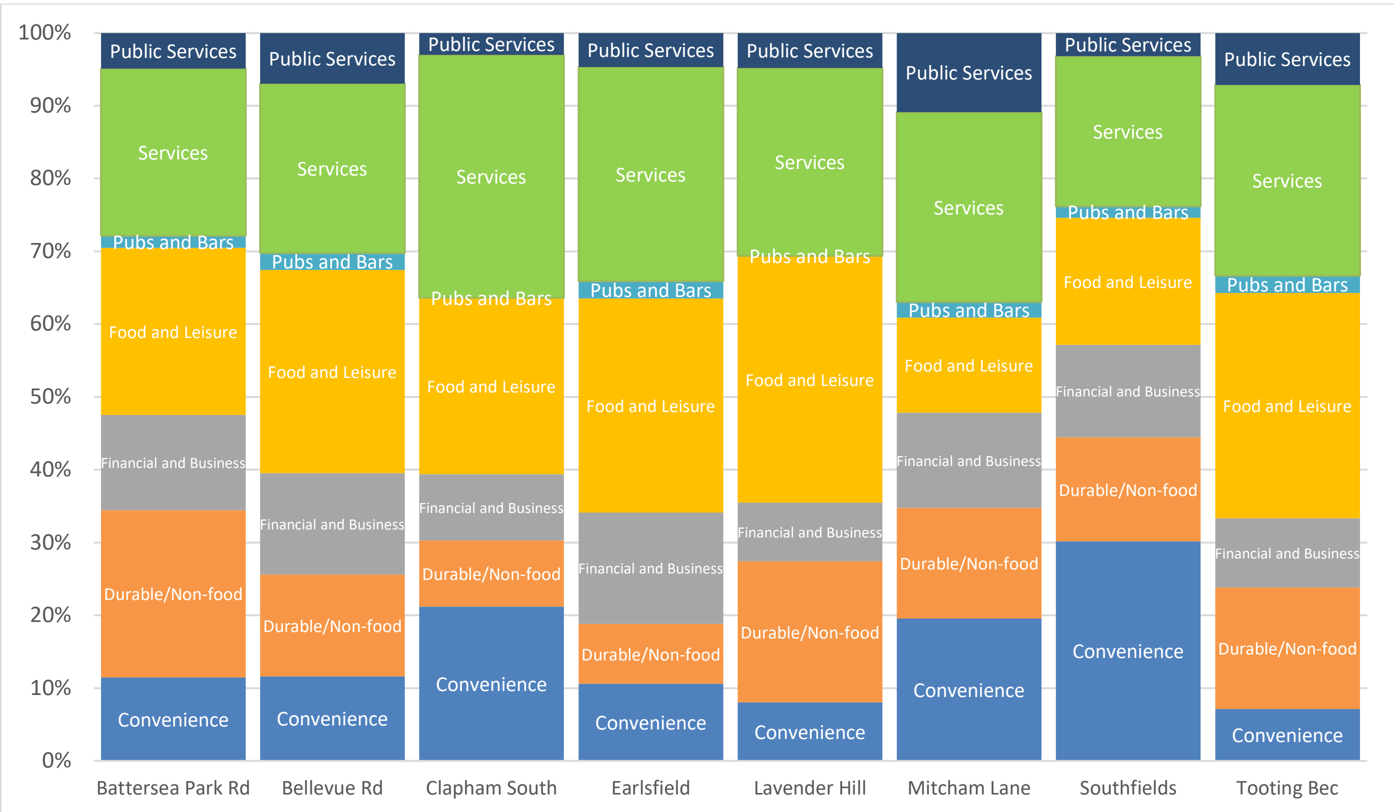


36. Local Centres – Retail Categories by Centre

The tables and chart below show the percentage of all units by retail category in each of the Local Centres.

Percentage of trading units in Local Centres by retail category

	Convenience	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Battersea Park Rd	11%	23%	13%	23%	2%	23%	5%
Bellevue Rd	12%	14%	14%	28%	2%	23%	7%
Clapham South	21%	9%	9%	24%	0%	33%	3%
Earlsfield	11%	8%	15%	29%	2%	29%	5%
Lavender Hill	8%	19%	8%	34%	0%	26%	5%
Mitcham Lane	20%	15%	13%	13%	2%	26%	11%
Southfields	30%	14%	13%	17%	2%	21%	3%
Tooting Bec	7%	17%	10%	31%	2%	26%	7%
Total	**15%**	**15%**	**12%**	**25%**	**2%**	**26%**	**6%**



37. Local Centres - change in Retail Categories between 2020 - 2021

Due to the lower number of retail units in each local centre, the change in the types of businesses may be affected by only one or two units changing. For example, in Tooting Bec out of 16 service retailers in 2020, 3 became vacant, and 2 changed use category resulting in an 8.5% drop. Similarly in Southfields, the closure of a bank and an estate agent and the change of another estate agent to a drycleaner resulted in a 5.3% drop in the number of Financial and Business units.

Change in Percentage of trading units in Local Centres by retail category – 2021 compared to 2020

	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Battersea Park Rd	-0.4%	-2.5%	1.3%	2.6%	-0.1%	-0.8%	-0.2%
Bellevue Rd	-1.2%	1.1%	-1.4%	2.3%	-0.2%	2.7%	-3.3%
Clapham South	-1.4%	2.6%	-0.6%	-1.6%	0.0%	1.1%	-0.2%
Earlsfield	-0.9%	-2.1%	-0.8%	0.7%	0.1%	3.0%	0.1%
Lavender Hill	0.7%	-4.2%	-0.8%	4.5%	0.0%	0.8%	-1.0%
Mitcham Lane	-1.7%	-3.9%	0.3%	-1.9%	2.2%	2.7%	2.4%
Southfields	0.7%	1.2%	-5.3%	1.1%	-0.1%	2.6%	-0.1%
Tooting Bec	0.2%	2.6%	-2.1%	5.2%	0.1%	-8.5%	2.4%
Total	-0.2%	-1.1%	-1.1%	1.6%	0.2%	0.7%	0.0%

38. Battersea Park Road Local Centre

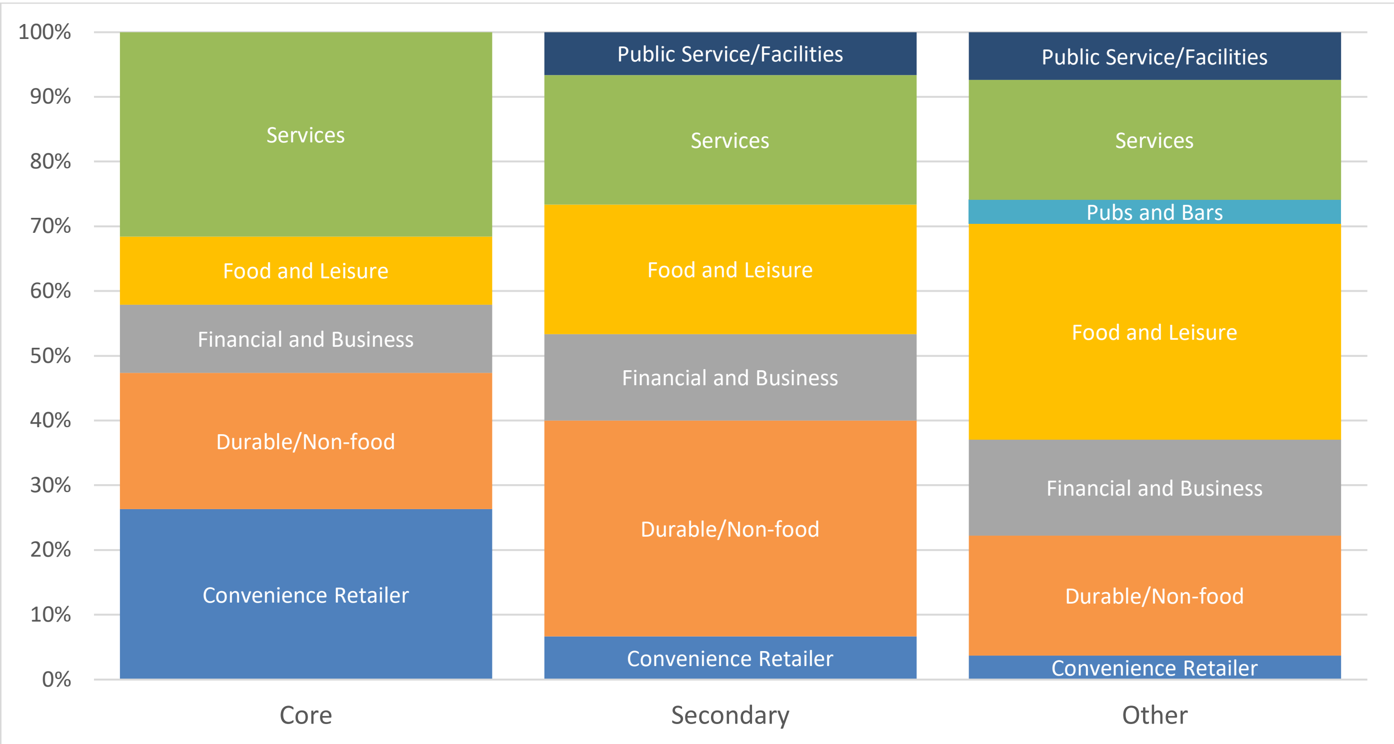
Vacant Units by year

Battersea Park Road - All Retail Frontages

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

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

	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	26%	21%	11%	11%	0%	32%	0%
Secondary	7%	33%	13%	20%	0%	20%	7%
Other	4%	19%	15%	33%	4%	19%	7%
Grand Total	11%	23%	13%	23%	2%	23%	5%



39. Bellevue Road Local Centre

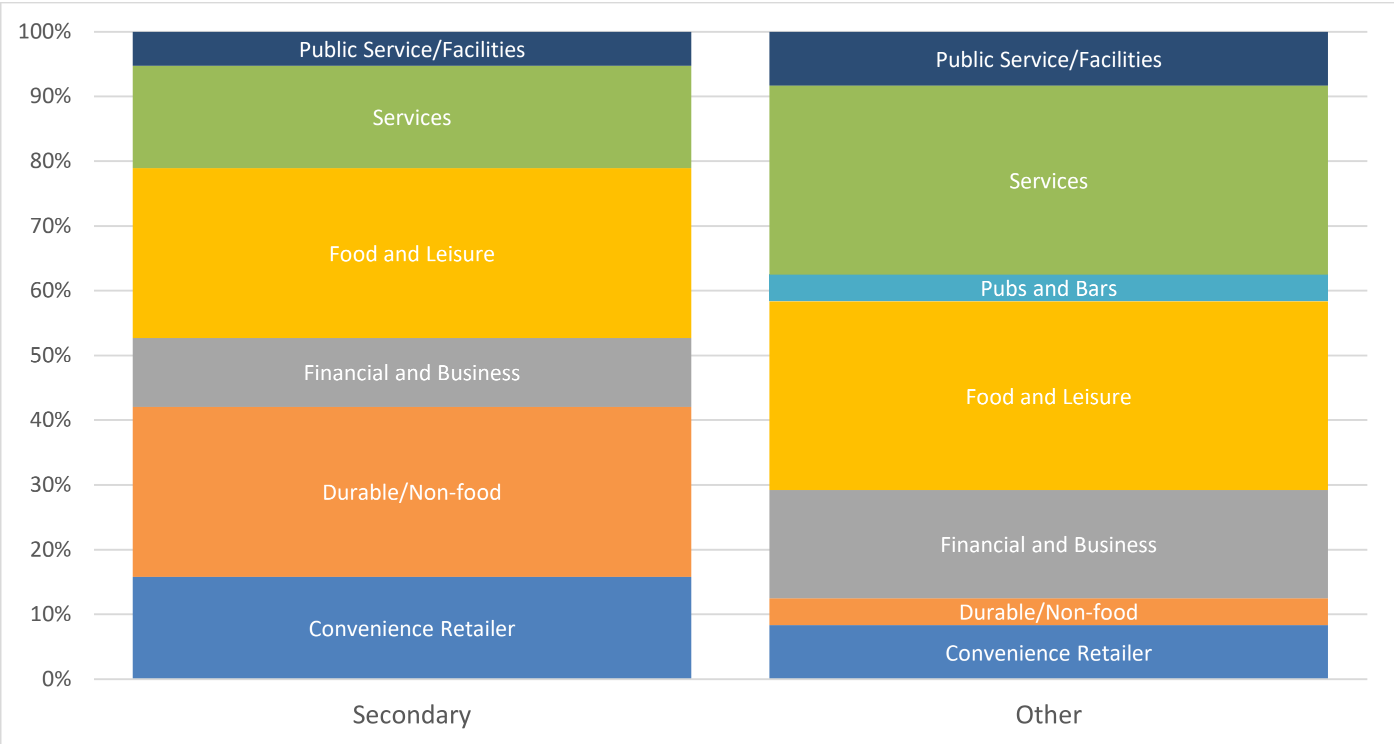
Vacant Units by year

Bellevue Road - All Retail Frontages

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

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

	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Secondary	16%	26%	11%	26%	0%	16%	5%
Other	8%	4%	17%	29%	4%	29%	8%
Grand Total	12%	14%	14%	28%	2%	23%	7%



40. Clapham South Local Centre

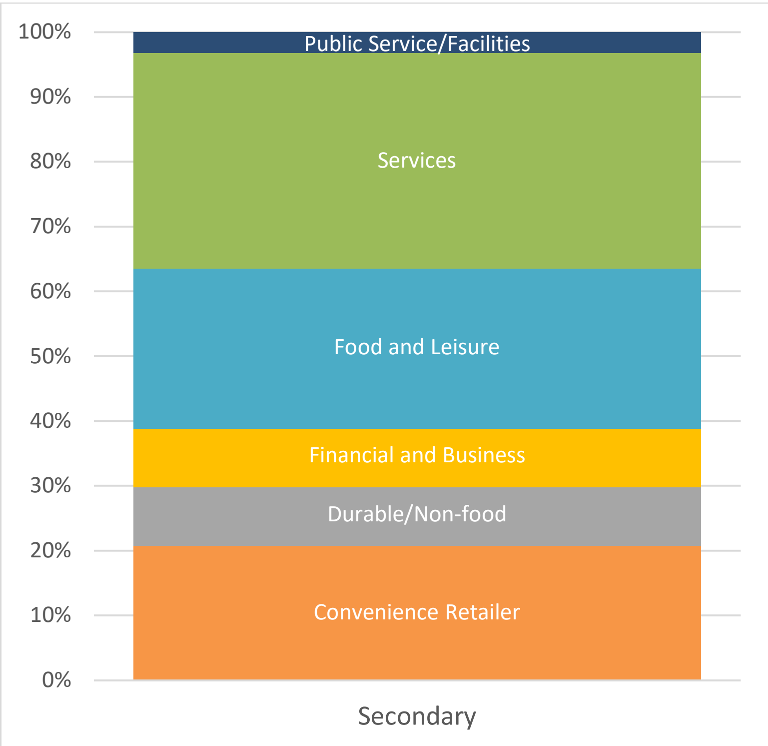
Vacant Units by year

Clapham South - All Retail Frontages

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

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

	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Services	Public Service/ Facilities
Secondary	21%	9%	9%	24%	33%	3%
Grand Total	21%	9%	9%	24%	33%	3%



41. Earlsfield Local Centre

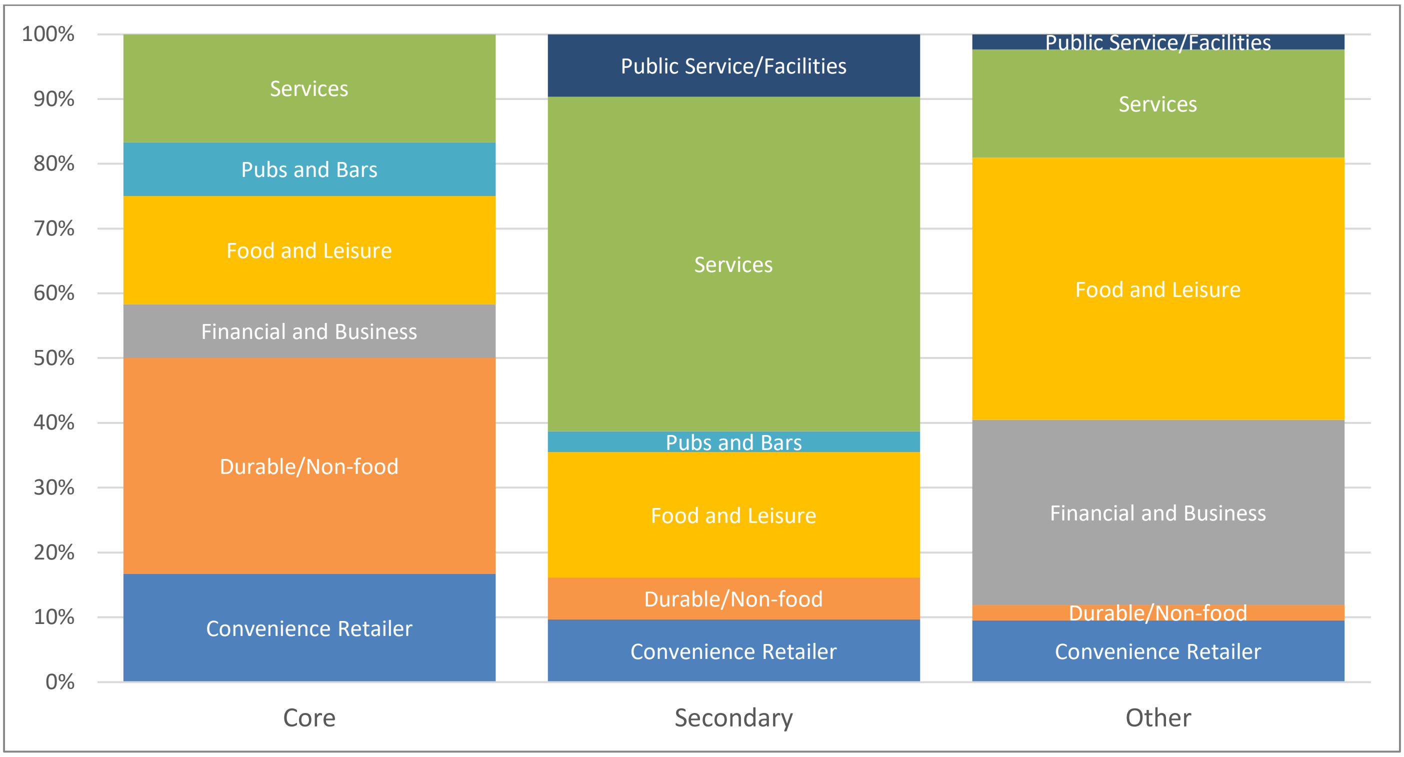
Vacant Units by year

Earlsfield - All Retail Frontages

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

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

	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	17%	33%	8%	17%	8%	17%	0%
Secondary	10%	6%	0%	19%	3%	52%	10%
Other	10%	2%	29%	40%	0%	17%	2%
Grand Total	11%	8%	15%	29%	2%	29%	5%



42. Lavender Hill/Queenstown Road Local Centre

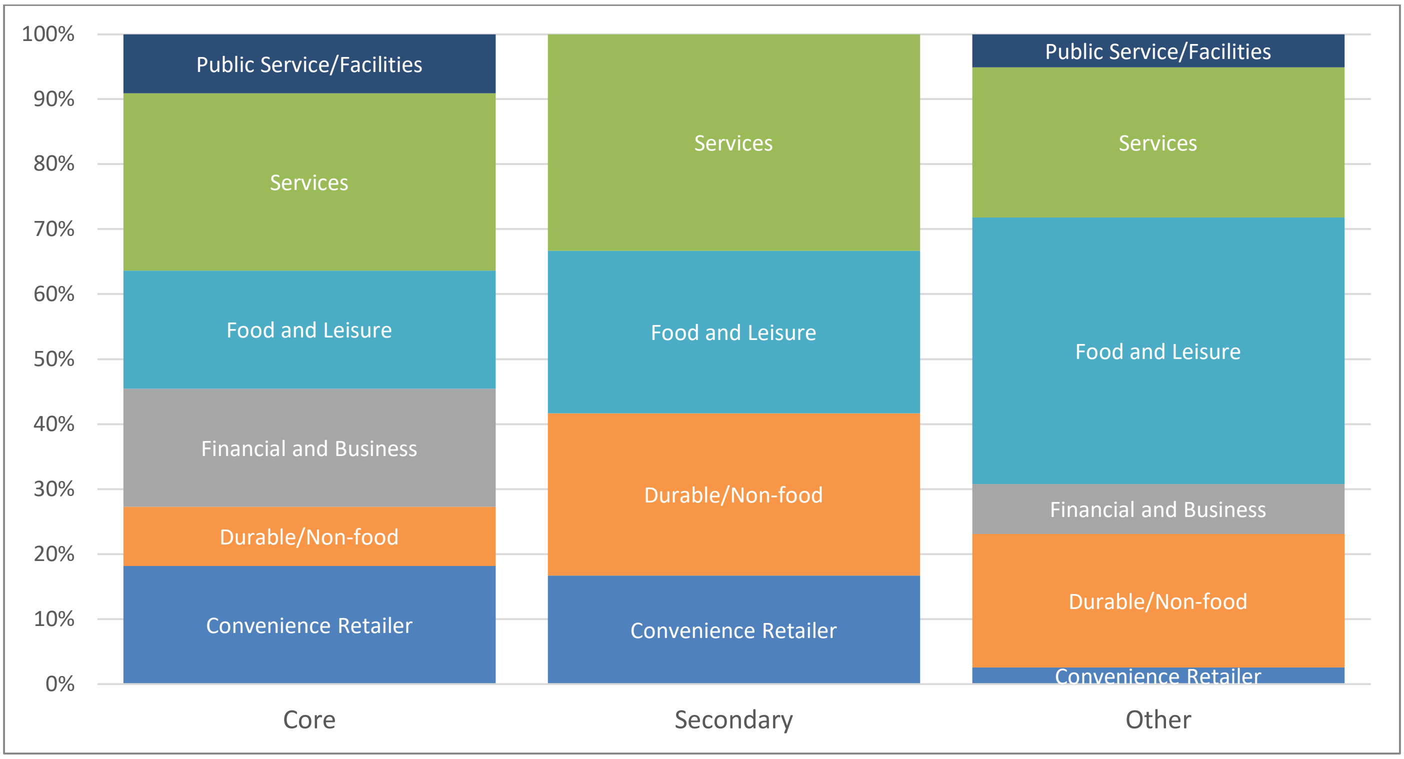
Vacant Units by year

Lavender Hill/Queenstown Road - All Retail Frontages

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

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

	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Services	Public Service/ Facilities
Core	18%	9%	18%	18%	27%	9%
Secondary	17%	25%	0%	25%	33%	0%
Other	3%	21%	8%	41%	23%	5%
Grand Total	8%	19%	8%	34%	26%	5%



43. Mitcham Lane Local Centre

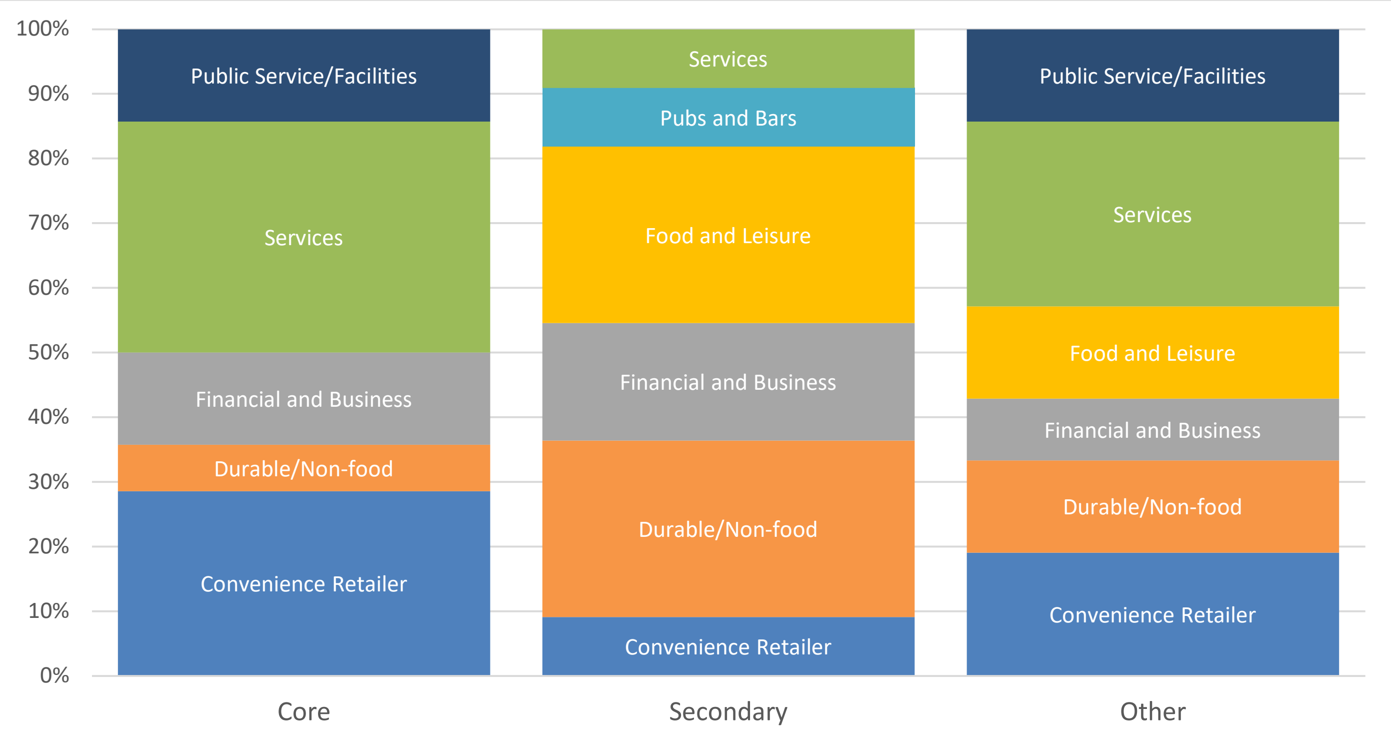
Vacant Units by year

Mitcham Lane - All Retail Frontages

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	61	62	63	63	62	63	65	65	65	64	63
Vacant Units	7	10	13	10	9	18	8	14	16	17	12
Vacancy Rate	11%	16%	21%	16%	15%	29%	12%	22%	25%	27%	19%

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

	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	29%	7%	14%	0%	0%	36%	14%
Secondary	9%	27%	18%	27%	9%	9%	0%
Other	19%	14%	10%	14%	0%	29%	14%
Grand Total	20%	15%	13%	13%	2%	26%	11%



44. Southfields Local Centre

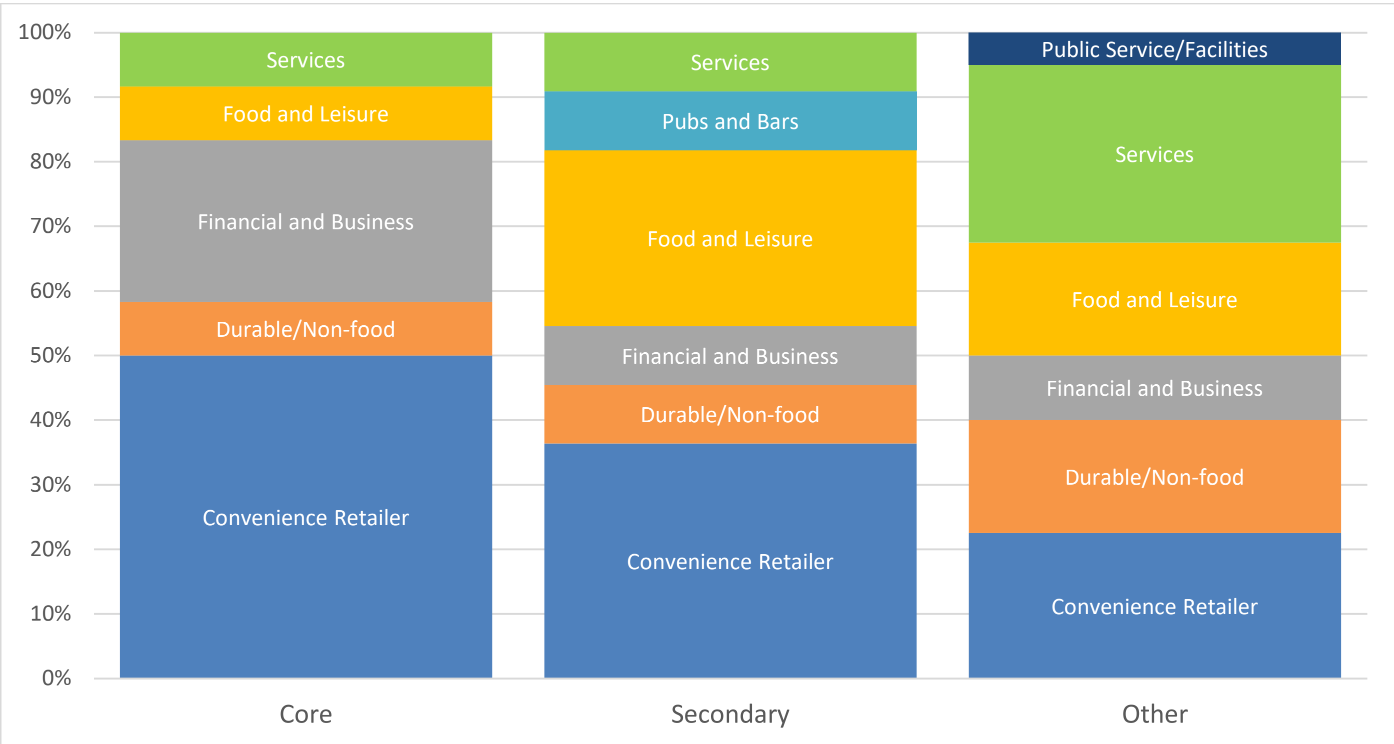
Vacant Units by year

Southfields - All Retail Frontages

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

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

	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	50%	8%	25%	8%	0%	8%	0%
Secondary	36%	9%	9%	27%	9%	9%	0%
Other	23%	18%	10%	18%	0%	28%	5%
Grand Total	30%	14%	13%	17%	2%	21%	3%



45. Tooting Bec Local Centre

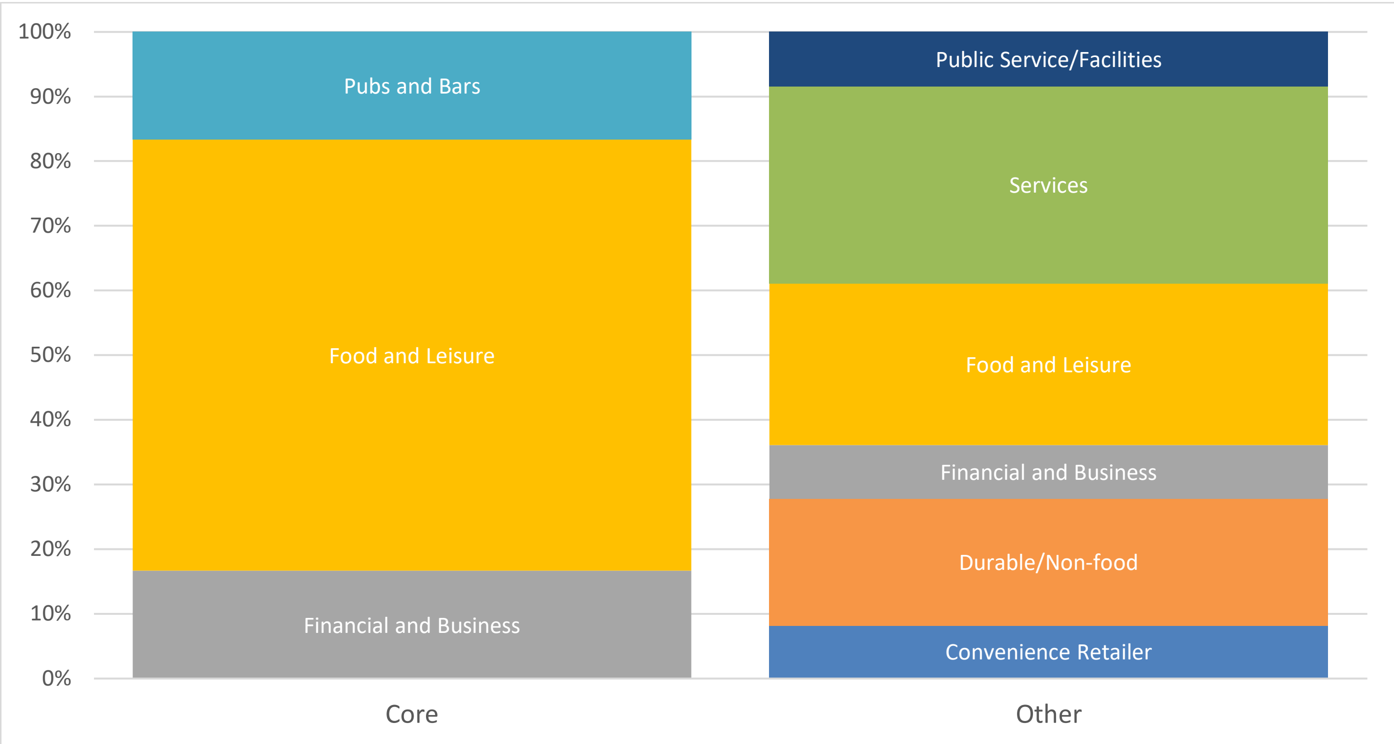
Vacant Units by year

Tooting Bec - All Retail Frontages

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

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

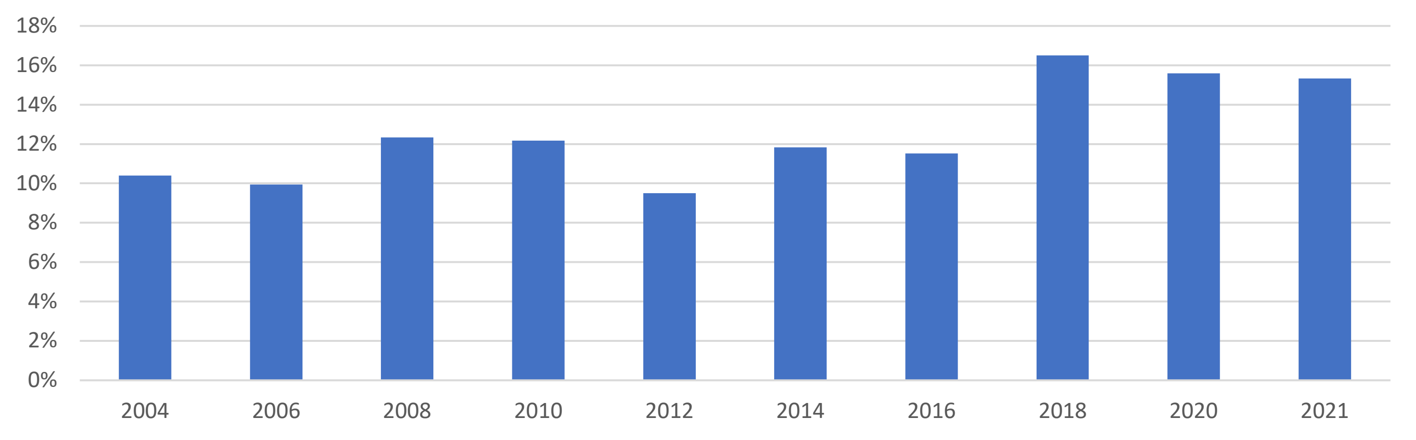
	Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
Core	0%	0%	17%	67%	17%	0%	0%
Other	8%	19%	8%	24%	0%	32%	8%
Grand Total	7%	16%	9%	30%	2%	28%	7%



46. Important Local Parades - Vacant Units by year

Units in All Retail Frontages in the Important Local Parades

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

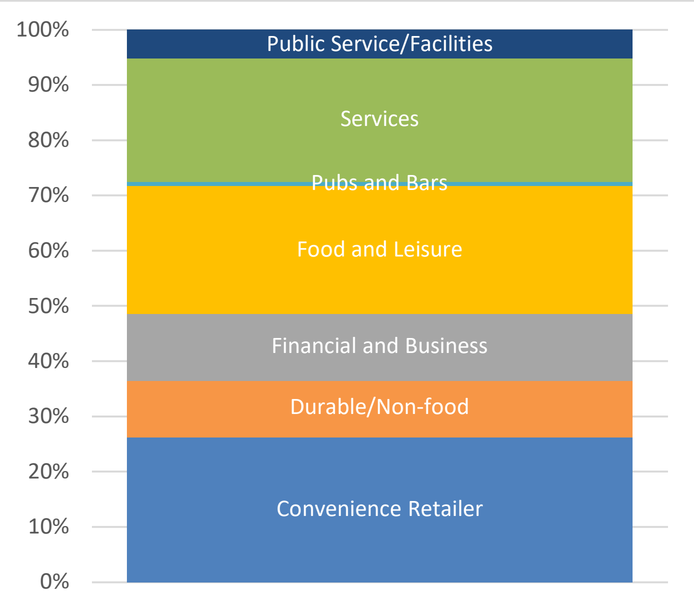


*Around a third of Local Parades were not surveyed in 2020

47. Important Local Parades – Retail Categories

Percentage of trading units in Important Local Parades by retail category

Convenience Retailer	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Services	Public Service/ Facilities
27%	10%	12%	23%	1%	22%	5%



Important Local Parades

Vacant Units by year

ILP1

152-168 Battersea Bridge Road

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	6	6	6	6	6	6	6	6	6	7	6
Vacant Units	0	0	0	0	0	0	0	1	2	2	1
Vacancy Rate	0%	0%	0%	0%	0%	0%	0%	17%	33%	29%	8%

ILP2

141-185 Battersea High Street

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	19	19	19	19	19	19	19	19	19	19	19
Vacant Units	5	5	5	3	3	4	1	4	5	9	4
Vacancy Rate	26%	26%	26%	16%	16%	21%	5%	21%	26%	47%	23%

ILP3

275-305 Battersea Park Road

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

ILP4

129-139 Beaumont Road

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

** All Units Under Construction*

ILP5

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

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

ILP6

47-67 East Hill

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	10	10	10	10	10	10	10	10	10	10	10
Vacant Units	1	0	0	1	1	0	0	2	2	1	1
Vacancy Rate	10%	0%	0%	10%	10%	0%	0%	20%	20%	10%	8%

ILP7

135-153 Franciscan Road

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

ILP8

171-227 Garratt Lane

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	29	29	29	29	29	29	29	29	29	29	29
Vacant Units	3	4	3	3	2	3	6	4	6	3	4
Vacancy Rate	10%	14%	10%	10%	7%	10%	21%	14%	21%	10%	13%

ILP9

812-842 & 911-919 Garratt Lane

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

ILP10

74-88 Inner Park Road

	2004	2006	2008	2010	2012	2014	2016	2018	2021	Average
Total Units	7	7	7	7	7	7	7	7	7	7
Vacant Units	0	0	0	0	0	0	0	2	1	0
Vacancy Rate	0%	0%	0%	0%	0%	0%	0%	29%	14%	5%

ILP11

50-94 Lower Richmond Road

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

ILP12

169-201 Merton Road

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	16	16	16	16	16	16	15	15	15	16	16
Vacant Units	1	2	1	0	0	0	1	1	3	3	1
Vacancy Rate	6%	13%	6%	0%	0%	0%	7%	7%	20%	19%	8%

ILP13

2-12 Montfort Place

	2004	2006	2008	2010	2012	2014	2016	2018	2021	Average
Total Units	4	4	4	4	4	4	4	4	4	4
Vacant Units	0	0	0	0	0	1	1	0	0	0
Vacancy Rate	0%	0%	0%	0%	0%	25%	25%	0%	0%	6%

ILP14

58-86 & 91-111 Moyser Road

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

ILP15

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

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	14	13	13	13	13	13	13	15	15	15	14
Vacant Units	0	0	2	2	0	1	1	3	0	0	1
Vacancy Rate	0%	0%	15%	15%	0%	8%	8%	20%	0%	0%	7%

ILP16

1-11 Petersfield Rise

	2004	2006	2008	2010	2012	2014	2016	2018	2021	Average
Total Units	4	4	4	4	4	4	4	4	4	4
Vacant Units	0	1	1	0	0	0	0	0	0	0
Vacancy Rate	0%	25%	25%	0%	0%	0%	0%	0%	0%	6%

ILP17

1-7 Portswood Place

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

ILP18

1-6 Rockingham Close

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

ILP19

115-141 St Johns Hill

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

ILP20

323-409 Tildesley Road

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

ILP21

314-324 Trinity Road

	2004	2006	2008	2010	2012	2014	2016	2018	2020	2021	Average
Total Units	6	6	6	6	6	6	6	5	5	5	6
Vacant Units	0	0	0	1	0	0	0	1	0	0	0
Vacancy Rate	0%	0%	0%	17%	0%	0%	0%	20%	0%	0%	4%