Introduction to the City of London Retail Survey

Period: 2011 – 2019

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Introduction

The City of London Local Plan (January 2015) Policy CS20 sets out the policy framework for retail provision within the City of London; Appendix 1 sets out the full policy wording. The City of London monitors retail uses through a set of key indicators, based on a review of retail facilities within the City of London, with focus on A1 retail units in the Principal Shopping Centres (PSCs), including the floorspace and proportion of the total frontage.

Data Sources

Data is maintained in sequence with the City of London Local Land and Property Gazetteer (LLPG).

This process incorporates:

- Biannual monitoring of development activity (set out in the City of London Development Schedules);
- Occupancy information collated from the City Occupiers Database (COD) survey, and
- Site visits conducted by the City of London Corporation.

The retail data includes:

- Use class;
- Floorspace;
- Frontage within the PSCs and Retail Links;
- Vacancy rates;
- Multiple and independent A1 units, and
- Experian classification.

The 2019 retail reports analyse the 2011-2019 period, using data from three individual years: 2011, 2015 and 2019. Although there may have been variances in the intervening years, the data in the reports gives a reasonably accurate illustration of the overall retail trends in the City during this period. The survey includes vacant premises, with the data classifications consistent with the previous uses and planning permissions.

Information Reports

The City of London publishes a series of annual information reports, to facilitate an on-going analysis of retail trends in the City of London.

The report, ‘Retail Units in the City of London’ provides an analysis of all retail units in the City of London, including:

- Distribution of retail units, analysed by use class;

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1 Data analysis includes retail uses ancillary to other uses (e.g. within St. Bartholomew’s Hospital).
Introduction to the City of London Retail Survey

- Number of units;
- Unit size;
- Vacancy rates;
- Multiple and independent A1 units, and
- Experian classification.

The City of London Local Plan Policy DM20.1 sets out the policy for the PSCs. Appendix 2 sets out the full policy wording. Map 1 sets out the spatial extent of the PSCs.

Individual reports are provided for each of the five PSCs:

- Cheapside;
- Fleet Street;
- Leadenhall Market;
- Liverpool Street and
- Moorgate.

Each of the PSCs has different characteristics and has been subject to different levels of redevelopment and transience of retail occupants. The information reports analyse changes to:

- The number of units;
- Retail floorspace;
- Retail frontage and
- Vacancy rates.

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2 See below for an explanation of all retail use classes.

3 The City of London Draft Local Plan proposes merging the Liverpool Street and Moorgate PSCs.
Map 1: Principal Shopping Centres in the City of London
Measurement of Floorspace and Frontage

Floorspace
Retail floorspace is measured from planning permissions or estimated (where planning permission data is not available). Where required, the City of London quality-assesses the estimate, using information held by the Valuation Office Agency (VOA).

Frontage
The term, ‘retail frontage’ refers to a building measured alongside the adjacent footway.

Within the PSCs, the City of London analyses the ground floor retail frontage for the retail uses, as Figure 1 sets out; this includes ground floor entrances to retail units situated primarily on upper floors or in basements.

![Figure 1: Measurement of Retail Frontage](image-url)
Retail Use Classes

The retail reports provide an analysis of the retail land uses, to assist in the review and implementation of planning policy. This is based on the land use categorisation set out in Part A of the Town and Country Planning (Use Classes) Order 1987 (as amended)\(^4\), which puts land and buildings into various categories, ‘use classes’, and is periodically revised. Table 1 defines individual retail use classes, illustrated in Pictures 1 to 4.

\(^4\) Source: Planning Portal.
### Use Classifications

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Category</th>
<th>Definition</th>
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| A1        | Shops                           | As well as traditional shops, this includes:  
  - Cafes and other food shops that **primarily** sell drinks or cold food;  
  - Opticians;  
  - Hair and beauty salons, and  
  - Travel agencies.                                                                 |
| A2        | Financial and Professional Services | This includes:  
  - Banks and building societies;  
  - Bureaux de change;  
  - Estate agencies, and  
  - Some employment agencies and legal firms.                                                                                                   |
| A3        | Restaurants and Cafes           | Any unit that **primarily** sells hot food for consumption on the premises.                                                                                                                                   |
| A4        | Drinking Establishments         | Any unit where the **primary** use is the purchase of alcoholic drinks for consumption on the premises (although many public houses also serve hot meals).                                                 |
| A5        | Hot Food Takeaways              | Any units that **primarily** sell hot food for consumption off the premises.                                                                                                                                   |
| Sui generis | -                               | This includes any units that:  
  - Do not fall into any of the above categories;  
  - Comprise a mixture of uses, with no primary function, or  
  - Are subject to special planning controls.  
  Sui generis retail units include nightclubs, car showrooms, launderettes, market stalls and betting shops.                                           |

**Table 1: Use Classes Order Classifications**

5 The use classes order classifies employment agencies and legal firms as retail if they have a large display window at the front.

6 This classification includes units selling hot food that have limited seating provision, and fast food outlets, because food purchased is often consumed off the premises.

7 These were classified as A2 until 16th April 2015; thus 2011 data shows some variances in A2 and sui generis units when compared to the 2015 and 2019 data.
Appendices

Appendix 1: City of London Local Plan Policy CS20 (Retailing)

‘To improve the quantity and quality of retailing and the retail environment, promoting the development of the five Principal Shopping Centres and the linkages between them, by:

1. Focusing new retail development on the Principal Shopping Centres, so that they become attractive shopping destinations. Encouraging movement between the Principal Shopping Centres by enhancing the retail environment in the Retail Links. Achieving a gross increase in retail floorspace within the PSCs and Retail Links of at least 136,000m² by 2026.
2. Requiring developers of major shopping proposals to demonstrate a sequential approach to site selection, looking firstly at locations within the Principal Shopping Centres, secondly at sites immediately adjoining the PSCs and in the Retail Links and, thirdly, other areas in the City.
3. Giving priority to shops (A1 uses) within the Principal Shopping Centres, with other retail uses directed to the peripheries of the centres and the Retail Links, resulting in an increase in the total A1 floorspace of 66,000m² by 2026.
4. Enhancing the environment of the Principal Shopping Centres and the Retail Links, specifically focusing on improving conditions for pedestrians, improving accessibility for all and ensuring a safe and secure retail environment.
5. Maintaining a scattered distribution of convenient local services elsewhere in the City by protecting existing retail facilities unless it is demonstrated that they are no longer required.’

Appendix 2: City of London Local Plan Policy DM20.1 (Principal Shopping Centres)

1. Within Principal Shopping Centres (PSCs) the loss of retail frontage and floorspace will be resisted and additional retail provision will be encouraged. Proposals for changes between retail uses within the PSC will be assessed against the following considerations:
   • maintaining a clear predominance of A1 shopping frontage within PSCs, refusing changes of use where it would result in more than 2 in 5 consecutive premises not in A1 or A2 deposit taker use;
   • the contribution the unit makes to the function and character of the PSC;
   • the effect of the proposal on the area involved in terms of the size of the unit, the length of its frontage, the composition and distribution of retail uses within the frontage and the location of the unit within the frontage.
2. Proposals for the change of use from shop (A1) to financial and professional service (A2) restaurant and cafes (A3) drinking establishments (A4) or hot food takeaways (A5), use at upper floor and basement levels will normally be permitted, where they do not detract from the functioning of the centre.’

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8 See the City of London Local Plan, Paragraph 3.20.2 and Policy DM20.2 (Retail links).
Introduction to the City of London Retail Survey

Information

The report, ‘Introduction to the City of London Retail Survey’ sets out a general introduction to retail use within the City of London.

The report, ‘City of London Retail Units’ provides an analysis of all retail units in the City. This is updated annually, providing information on:

- Retail units;
- Retail floorspace;
- Vacant units;
- Multiple and independent A1 units, and
- Comparison and convenience stores.

The City of London Local Plan sets out policies for Principal Shopping Centres (PSCs). Information reports are provided for each of the PSCs (Cheapside, Fleet Street, Leadenhall Market, Liverpool Street and Moorgate).

Queries regarding retail data can be made to: pln-moninfo@cityoflondon.gov.uk.

Queries regarding retail policy can be made to: localplan@cityoflondon.gov.uk.

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The City of London Corporation is the local authority for the financial and commercial heart of Britain, the City of London.