Retail Links in the City of London

As at 31st March 2019

Section 2 of 2: Analysis of individual Retail Links: Number of units, floorspace and frontage

Published by the City of London Corporation, Department of the Built Environment

July 2019
Retail Links (Part 2)

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Introduction

Purpose of this Document
Monitoring of Retail Uses in the City of London

The retail reports provide information relating to the implementation and review of planning policy. Under planning legislation, most retail services fall within a range of A1 to A5 use classes, as defined in the Town and Country Planning (Use Classes) Order 1987 (as amended)\(^1\); there is also a range of units classified as sui generis.

The document, ‘Introduction to the City of London Retail Survey’ sets out an overview of the monitoring framework.

Document Structure

The profile of the Retail Links, analysing the number of units, total floorspace and frontage, is divided into two sections:

- Section 1 provides the policy context and comparison of the Retail Links, and
- Section 2 provides in-depth analysis of individual Retail Links.

This document is Section 2, which analyses the Retail Links individually, as at 31st March 2019, in terms of:

- Number of retail units;
- Total retail floorspace and
- Total retail frontage.

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\(^1\) Source: Planning Portal.
Cheapside to Eastcheap Retail Link

Location and Character

Cheapside to Eastcheap Retail Link is situated towards the south of the City of London, and primarily extends along Cannon Street and Eastcheap. This Retail Link has rail connections to the south, via Cannon Street Station.

This is the longest of the City’s Retail Links and comprises:

1. The southern end of Bow Lane, directly south of Cheapside Principal Shopping Centre (PSC) frontage, adjacent to Mansion House Underground Station; during 2018, new retail units (Picture 1) were completed at the Bow Lane frontage of 45 Cannon Street;
2. Cannon Street (Picture 2) east of Bow Lane; retail uses here comprise mostly sandwich bars and restaurants; a recent redevelopment scheme at Bloomberg Place provides a northern pedestrian linkage (Bloomberg Arcade) connecting Cannon Street Station to the Cheapside PSC with continuous retail frontage; as at 31st March 2019, Cannon Street was subject to redevelopment works on a site between Abchurch Lane and Nicholas Lane;
3. The southern part of King William Street, connecting the City of London with London Bridge Station and Borough Market, in the London Borough of Southwark; London Bridge attracts large pedestrian flows, particularly during peak hours, and
4. Eastcheap, which connects Cannon Street, and Monument Underground Station, to the Tower of London and Tower Bridge, and has a similar character to Cannon Street.

Map 1 illustrates the extent of Cheapside to Eastcheap Retail Link, as at 31st March 2019.

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2 The extent of Cheapside PSC is set out in the report, ‘Retail Units in the Cheapside Principal Shopping Centre’.
There were 83 retail units in Cheapside to Eastcheap Retail Link, as at 31st March 2019.

Graph 1 sets out the number and proportion of retail units, analysed by use class:

- 62 units were in A1 use; this represented three quarters of the total;
- 6 units were in A2 and sui generis use; this represented 7% of the total, and
- 15 units were in A3, A4 and A5 use; this represented 18% of the total.
There was 22,800m² of retail floorspace in Cheapside to Eastcheap Retail Link, as at 31st March 2019.

Graph 2 sets out the amount and proportion of retail floorspace, analysed by use class:

- As with the number of retail units, A1 retail floorspace was dominant, accounting for 18,100m²; this represented 80% of the total;
- There was 1,600m² of A2 and sui generis floorspace; this represented 7% of the total, and
- There was 3,100m² of A3, A4 and A5 floorspace; this represented 13% of the total.
There was 755m of retail frontage in Cheapside to Eastcheap Retail Link, as at 31st March 2019.

Graph 3 sets out the amount and proportion of retail frontage, analysed by use class:

- There was 597m of A1 frontage; this represented 79% of all retail frontage;
- There was 47m of A2 and sui generis frontage; this represented 6% of all retail frontage, and
- There was 111m of A3, A4 and A5 frontage; this represented 15% of all retail frontage.
Cheapside to Fleet Street Retail Link

Location and Character

Cheapside to Fleet Street Retail Link is situated between Ludgate Circus and One New Change, directly adjacent to St. Paul’s Cathedral, and therefore attracts a large number of visitors both on weekdays and weekends.

The Retail Link comprises:

1. Ludgate Hill (Picture 3) and the eastern frontage of Ludgate Circus; this contains mostly continuous retail frontage, although there are some large office uses located towards the west; as at 31st March 2019, part of the retail frontage at Creed Court was under construction but projected to remain in retail use;
2. The modern retail frontage at Paternoster Row (Picture 4), Canon Alley and Queen’s Head Passage, constructed as part of a major redevelopment scheme on private land; this part of the City contains a range of sandwich shops, restaurants and cafes, catering for visitors and workers, and
3. 5 Cheapside, which is not within Cheapside PSC.

Map 2 illustrates the extent of Cheapside to Fleet Street Retail Link as at 31st March 2019.

![Picture 3: Ludgate Hill](image3.jpg)  ![Picture 4: Paternoster Row](image4.jpg)
There were 62 retail units in Cheapside to Fleet Street Retail Link, as at 31st March 2019.

**Graph 4** sets out the number and proportion of retail units, analysed by use class:

- The majority (43) were in A1 use; this represented 69% of the total;
- 9 were in A2 and sui generis use; this represented 15% of the total, and
- 10 were in A3, A4 and A5 use; this represented 16% of the total.
Retail Floorspace

Graph 5: Retail Floorspace in the Cheapside to Fleet Street Retail Link (2019)

There was 18,800m² of retail floorspace in the Cheapside to Fleet Street Retail Link, as at 31st March 2019.

**Graph 5** sets out the amount and proportion of retail floorspace, analysed by use class:

- Unlike the number of retail units, A1 floorspace was less dominant, amounting to 10,300m², which is 55% of the total floorspace;
- There was 2,100m² of A2 and sui generis floorspace, which represented 11% of the total floorspace, and
- There was 6,400m² of A3, A4 and A5 floorspace, which represented 34% of the total floorspace.
Graph 6: Retail Frontage in the Cheapside to Fleet Street Retail Link (2019)

There was 826m of retail frontage in the Cheapside to Fleet Street Retail Link, as at 31st March 2019.

**Graph 6** sets out the amount and proportion of retail frontage, analysed by use class:

- As with the total units, A1 frontage was dominant, totalling 554m, or 67% of the all retail frontage;
- There was 133m of A2 and sui generis frontage; this represented 16% of all retail frontage, and
- There was 139m of A3, A4 and A5 frontage; this represented 17% of all retail frontage.
Cheapside to Holborn Retail Link

Location and Character

Cheapside to Holborn Retail Link is located towards the north-west of the City of London, on the main thoroughfare connecting the City to High Holborn, Oxford Street and parts of West London.

The Retail Link comprises:

1. High Holborn (Picture 5) and Holborn, comprising mostly continuous retail frontage on either side, with a mixture of retail unit types; only the south side of this street is within the Retail Link; the north side is located within the London Borough of Camden, and is thus subject to retail policies set out in the Camden Local Plan (adopted 2017);
2. Holborn Viaduct and Newgate Street (Picture 6), where the retail frontage is less uniform and is broken up by office entrances, the City Temple, the Central Criminal Court and churchyard sites, and
3. Retail frontage at St. Martin’s-le-Grand, within the building structure of 150 Cheapside; this is not directly adjacent to other parts of the Retail Link, which is broken up by offices and open spaces.

Map 3 illustrates the extent of Cheapside to Holborn Retail Link, as at 31st March 2019.

Picture 5: High Holborn

Picture 6: Newgate Street
Map 3: Cheapside to Holborn Retail Link (2019)
There were 50 retail units in the Cheapside to Holborn Retail Link, as at 31st March 2019.

**Graph 7** sets out the number and proportion of retail units, analysed by use class:

- A1 uses were dominant, with 35 units, which represented 70% of the total;
- There were 7 A2 and sui generis units, which represented 14% of the total, and
- There were 8 A3, A4 and A5 units, which represented 16% of the total.
There was 15,700m² of retail floorspace in the Cheapside to Holborn Retail Link, as at 31st March 2019.

**Graph 8** sets out the amount and proportion of retail floorspace, analysed by use class:

- There was 8,100m² of A1 floorspace, which represented 52% of the total;
- There was 3,900m² of A2 and sui generis floorspace, which represented a quarter of the total, and
- There was 3,700m² of A3, A4 and A5 floorspace, which represented 23% of the total.
There was 560m of retail frontage in the Cheapside to Holborn Retail Link, as at 31st March 2019.

Graph 9 sets out the amount and proportion of retail frontage, analysed by use class:

- There was 386m of A1 frontage, which represented 69% of all retail frontage;
- There was 96m of A2 and sui generis frontage, which represented 17% of all retail frontage, and
- There was 78m of A3, A4 and A5 frontage, which represented 14% of all retail frontage.
Cheapside to Leadenhall Market Retail Link

Location and Character

Cheapside to Leadenhall Market Retail Link is located to the east of the central area (between Bank Junction and Gracechurch Street) and comprises of:

1. The Royal Exchange (Picture 7) developed in 1841 on a site provided by the City of London and the Worshipful Company of Mercers for use as a commercial centre, now occupied by retail units, most of which are small shops selling comparison goods; the Retail Link does not include the internal retail units at the Royal Exchange;
2. Cornhill (Picture 8), which provides direct access from Bank Station to Leadenhall Street and Aldgate; most retail uses here are small food and drink outlets and large A4 units, and
3. Lombard Street, a smaller thoroughfare located between Bank Station and Fenchurch Street, which has traditionally been home to several financial institutions, and is primarily occupied by offices; as at 31st March 2019, there were only five retail units in this street.

This Retail Link attracts large number of pedestrians all day, mostly because it is located between Bank Station and the City of London’s Eastern Cluster Key City Place³, which contains a high concentration of office uses.

Map 4 illustrates the extent of Cheapside to Leadenhall Market Retail Link, as at 31st March 2019.

³ See the City of London Local Plan, Policy CS7 (Eastern Cluster).
Map 4: Cheapside to Leadenhall Market Retail Link (2019)
There were 55 retail units in the Cheapside to Leadenhall Market Retail Link, as at 31st March 2019.

Graph 10 sets out the number and proportion of retail units, analysed by use class:

- A1 uses were dominant, occupying 44 units, which represented 80% of the total;
- There were just 2 A2 and sui generis units, which represented 4% of the total, and
- There were 9 A3, A4 and A5 units, which represented 16% of the total.
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Retail Floorspace

There was 14,300m² of retail floorspace in the Cheapside to Leadenhall Market Retail Link, as at 31st March 2019.

Graph 11 sets out the amount and proportion of retail floorspace, analysed by use class:

- There was 6,200m² of A1 floorspace; in contrast to the high proportion of A1 units, this represented just 43% of the total floorspace;
- There was just 800m² of A2 and sui generis floorspace, which represented 6% of the total floorspace, and
- There was 7,300m² of A3, A4 and A5 floorspace, due to the presence of large-scale restaurants and public houses, representing 51% of the total floorspace.
There was 566m of retail frontage in the Cheapside to Leadenhall Market Retail Link, as at 31st March 2019.

Graph 12 sets out the amount and proportion of retail frontage, analysed by use class:

- As with the total units, A1 frontage was dominant, totalling 417m; this represented 74% of all retail frontage;
- There was just 20m of A2 and sui generis retail frontage, which represented 3% of all retail frontage, and
- There was 129m of A3, A4 and A5 frontage, which represented 23% of all retail frontage.
**Cheapside to Moorgate Retail Link**

**Location and Character**

Cheapside to Moorgate Retail Link is located directly north of Cheapside PSC, and links Cheapside and Moorgate PSCs; it comprises:

1. **Moorgate (Picture 9),** excluding the Moorgate PSC frontage; this is characterised by modern office buildings and several A4 units.
2. A small part of the Gresham Street frontage, between Old Jewry and Moorgate, and
3. **Old Jewry (Picture 10),** which connects Gresham Street to Cheapside, and is characterised by larger office buildings with ground floor restaurants.

Because of the number of large office frontages, retail units in this Retail Link are sporadic.

**Map 5** illustrates the extent of Cheapside to Moorgate Retail Link, as at 31st March 2019.

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4 The extent of Moorgate PSC is set out in the report, ‘Retail Units in Moorgate Principal Shopping Centre’.
There were just 15 retail units in the Cheapside to Moorgate Retail Link, as at 31st March 2019.

Graph 13 sets out the number and proportion of retail units, analysed by use class:

- There were just 3 A1 units, which represented 20% of the total;
- There were 4 A2 and sui generis units, which represented 27% of the total;
- There were 8 A3 and A4 units, which represented 53% of the total; the prime location was Old Jewry (there were no A5 units).
Retail Floorspace

There was 8,000m² of retail floorspace in the Cheapside to Moorgate Retail Link, as at 31st March 2019.

**Graph 14** sets out the amount and proportion of retail floorspace, analysed by use class:

- There was just 400m² of A1 floorspace, which represented 6% of the total;
- There was 1,800m² of A2 and sui generis floorspace, which represented 22% of the total, and
- A3 and A4 floorspace was dominant, totalling 5,800m², which represented 72% of the total.
There was 220m of retail frontage in the Cheapside to Moorgate Retail Link, as at 31st March 2019.

**Graph 15** sets out the amount and proportion of retail frontage, analysed by use class:

- As with the total units and floorspace, there were low levels of A1 frontage, totalling just 28m; this represented 13% of all retail frontage;
- There was 93m of A2 and sui generis frontage, which represented 42% of all retail frontage, and
- There was 99m of A3 and A4 frontage, which represented 45% of all retail frontage.
Leadenhall Market to Aldgate Retail Link

Location and Character

Leadenhall Market to Aldgate Retail Link extends eastwards, from the boundary of Leadenhall Market PSC \(^5\) to the eastern boundary of the City, comprising:

1. Fenchurch Street (Picture 11), where new retail units were provided at 120 Fenchurch Street (completed 2019); as at 31\(^{st}\) March 2019, construction works were taking place at 76-78 Fenchurch Street, and
2. Aldgate High Street (Picture 12), which provides a principal route out of the City of London via the original ‘Ale Gate’, and:
   - provides road connections to Whitechapel, Stratford and Canary Wharf;
   - is close to medium-size residential estates at Middlesex Street and Mansell Street;
   - is adjacent to the City Fringe Opportunity Area, which is within the London Borough of Tower Hamlets, and subject to policies set out in the Tower Hamlets Core Strategy (adopted September 2010) and
   - was enhanced in 2018 by the completion of a new open space at Aldgate Square.

There is good access to public transport, including Fenchurch Street Station, Aldgate Underground Station and Aldgate Bus Station.

Map 6 illustrates the extent of Leadenhall Market to Aldgate Retail Link, as at 31\(^{st}\) March 2019.

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\(^5\) The extent of Leadenhall Market PSC is set out in the report, ‘Retail Units in Leadenhall Market Principal Shopping Centre’. 
There were 50 retail units in the Leadenhall Market to Aldgate Retail Link, as at 31st March 2019.

**Graph 16** sets out the number and proportion of retail units, analysed by use class:

- There were 30 A1 units, which represented 60% of the total;
- There were 11 A2 and sui generis units, which represented 22% of the total, and
- There were 9 A3, A4 and A5 units, which represented 18% of the total.
Retail Floorspace

Graph 17: Retail Floorspace in the Leadenhall Market to Aldgate Retail Link (2019)

There was 12,300m² of retail floorspace in the Leadenhall Market to Aldgate Retail Link, as at 31st March 2019.

Graph 17 sets out the amount and proportion of retail floorspace, analysed by use class:

- There was 6,600m² of A1 floorspace, which represented 54% of the total;
- Despite the low number of A2 and sui generis units, there was 3,300m² of A2 and sui generis floorspace, which represented 27% of the total, and
- There was 2,400m² of A3, A4 and A5 floorspace, which represented just 19% of the total.
Graph 18: Retail Frontage in the Leadenhall Market to Aldgate Retail Link (2019)

There was 544m of retail frontage in the Leadenhall Market to Aldgate Retail Link, as at 31st March 2019.

Graph 18 sets out the amount and proportion of retail frontage, analysed by use class:

- The profile of frontage by use class was similar to floorspace, with 314m of A1 frontage, representing 58% of all retail frontage;
- There was 164m of A2 and sui generis frontage, representing 30% of all retail frontage, and
- There was just 66m of A3, A4 and A5 frontage, representing 12% of all retail frontage.
Long Lane Retail Link

Location and Character

Long Lane Retail Link is located towards the north of the City, directly to the east of the historic Smithfield Meat Market (Picture 13) and St. Bartholomew’s Hospital. The Barbican and Golden Lane residential estates are located directly to the east of the Retail Link, and there is a strong residential element to Long Lane and some of the surrounding streets.

Long Lane is the only Retail Link that does not directly connect to a PSC; it is also relatively short in comparison to most other Retail Links.

This Retail Link primarily comprises of Long Lane, which connects the Smithfield Rotunda to Aldersgate Street. Retail uses in Long Lane (Picture 14) comprise a range of A1, A3 and A4 units. The link also includes Grand Avenue, a public street within the market area, closed to motor vehicles except those serving the market. The retail frontage continues into Cowcross Street, which is within the London Borough of Islington and thus subject to retail policies set out in the Islington Core Strategy (adopted 17th February 2011). Thus, the Long Lane Retail Link provides an almost continuous retail frontage along a pedestrian route that connects Farringdon and Barbican stations.

Although two of the Smithfield Market buildings, classified as sui generis, have frontage on the Retail Link, they are not included in the statistics for this report. The market stalls are open at limited times of the day and are located inside the buildings; a large proportion of the buildings and their frontage is taken up by distribution uses.

Map 7 illustrates the extent of Long Lane Retail Link, as at 31st March 2019.

Picture 13: Smithfield Market

Picture 14: Retail Units at Long Lane
There were 24 retail units in the Long Lane Retail Link, as at 31st March 2019.

**Graph 19** sets out the number and proportion of retail units, analysed by use class:

- There were 13 A1 units, representing 54% of the total;
- There were 3 A2 and sui generis units, representing 13% of the total;
- There were 8 A3 and A4 units (there were no A5 units), representing a third of the total.

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6 Sui generis figures in this report do not include the markets.
There was 5,200m² of retail floorspace in the Long Lane Retail Link, as at 31st March 2019.

Graph 20 sets out the amount and proportion of retail floorspace, analysed by use class:

- There was 2,600m² of A1 floorspace; this represented 51% of the total;
- There was just 300m² of A2 and sui generis floorspace; this represented 5% of the total, and
- There was 2,300m² of A3 and A4 floorspace; this represented 44% of the total.
Retail Frontage

There was 183m of retail frontage in the Long Lane Retail Link, as at 31st March 2019.

Graph 21 sets out the amount and proportion of retail frontage, analysed by use class:

- There was 91m of A1 retail frontage; this represented half of all retail frontage;
- There was 24m of A2 and sui generis frontage; this represented 13% of all retail frontage, and
- There was 68m of A3 and A4 frontage; this represented 37% of all retail frontage.
Moorgate to Liverpool Street Retail Link

Location and Character

Moorgate to Liverpool Street Retail Link comprises two separate, small-scale frontages, which link Moorgate and Liverpool Street PSC's:

1. South Place and Eldon Street (Picture 15), which primarily comprise small A1 units, and
2. London Wall and Blomfield Street (Picture 16), which primarily comprise large offices, but contain some retail units selling food and drink; thus, this area is commonly used by workers as a lunchtime destination.

Both elements of the Retail Link form significant walking routes, used to access Moorgate and Liverpool Street stations from office locations; thus, they are heavily used during peak hours.

Map 8 illustrates the extent of Moorgate to Liverpool Street Retail Link, and the adjacent PSCs, as at 31st March 2019.
Map 8: Moorgate to Liverpool Street Retail Link (2019)
There were just 17 retail units in the Moorgate to Liverpool Street Retail Link, as at 31st March 2019.

Graph 22 sets out the number and proportion of retail units, analysed by use class:

- A1 uses were dominant, with 13 units, representing 76% of the total;
- There was just 1 A2 unit, which represented 6% of the total (there were no sui generis units);
- There were 3 A3 and A4 units, which represented 18% of the total (there were no A5 units).
Graph 23: Retail Floorspace in the Moorgate to Liverpool Street Retail Link (2019)

There was 3,900m$^2$ of retail floorspace in the Moorgate to Liverpool Street Retail Link, as at 31st March 2019.

**Graph 23** sets out the amount and proportion of retail floorspace, analysed by use class:

- There was 1,800m$^2$ of A1 retail floorspace in the Moorgate to Liverpool Street Retail Link; despite the dominance of A1 units, this represented just 45% of the floorspace total;
- The only A2 unit was relatively large, with a floorspace of 800m$^2$, representing 21% of the total;
- There was 1,300m$^2$ of A3 and A4 floorspace, representing 34% of the total.
There was 195m of retail frontage in Moorgate to Liverpool Street Retail Link, as at 31st March 2019.

**Graph 24** sets out the amount and proportion of retail frontage, analysed by use class:

- There was 110m of A1 frontage; this represented 56% of all retail frontage;
- The only A2 unit had a long frontage, measuring 30m and representing 16% of all retail frontage, and
- There was 55m of A3 and A4 frontage, representing 28% of all retail frontage.
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 DM20.2 (Retail links)**

To encourage the provision and resist the loss of retail frontage and floorspace within the Retail Links. A mix of shops and other retail uses will be encouraged in the Links, ensuring that the location and balance of uses does not adversely affect the function of the Link, any nearby PSC or their surrounding areas.
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 Retail Links.

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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