

Study of Art in St James's

St James's Conservation Trust

1st March 2019



Notice

This document and its contents have been prepared and are intended solely for the St James's Conservation Trust's information and use in relation to the protection of art and related uses in St James's.

Atkins Ltd. assumes no responsibility to any other party in respect of or arising out of or in connection with this document and/or its contents.

This document has 36 pages including the covers.

Document history

Job number: 5118414			Document ref: 5118414/ART/001			
Revision	Purpose description	Originated	Checked	Reviewed	Authorised	Date
Rev 0.1	First draft for review	OH	PH	PH	PH	26/11/18
Rev 0.2	Final draft	OH	PH	PH	PH	30/11/18
Rev 0.3	Final version	OH	PH	PH	PH	01/03/19

Client signoff

Client	St James's Conservation Trust
Project	Study of Art in St James's
Document title	Study of Art in St James's
Job no.	5118414
Copy no.	1
Document reference	5118414/ART/001



Contents

Chapters

Executive Summary

1. Introduction

Art in St James's

Purpose of the Study

Study Outputs

2. Approach

Scope

Methodology

Contextual Review

Consultation

3. Context

The UK Art Market

Art Uses in London

Policy and Strategies

Summary

4. Findings

Number and Type of Art Uses

Location of Art Uses

Change Over Time

Business Needs

Challenges

Business Portraits

5. Conclusions and Recommendations

Summary of Findings

St James's Conservation Trust Recommendations

Appendices

Appendix A. Database of Art Uses

Appendix B. Business Survey Questions

Appendix C. Business Survey Data

Tables

Table 1. Changes in art businesses identified in the 2012 Study

Table 2. Database of art uses in St James's (November 2018)

Table 3. 2012 Study database of art galleries in St James's with changes noted.

Page

4

5

5

5

5

6

6

7

7

7

8

8

8

9

10

11

11

13

14

16

18

21

23

23

23

24

25

30

33

Figures

Photographs from Crown Estate St James's London website unless stated otherwise.

Cover page (clockwise from top left): David Gill Gallery on King Street, S. Franses on Jermyn Street, Spoon from the collection of JH Bourdon-Smith (JH Bourdon-Smith), Daniel Crouch Rare Books on Bury Street, Mackinnon Fine Furniture's award-winning bureau bookcases.

Notice page: Sidney Richard Percy, part of the collection of Macconnal-Mason (Macconnal-Mason).

Executive Summary page: From the collection of Gibson Antiques (Gibson Antiques).

Figure 1-1. '2012 Study' (Atkins)

Figure 2-1. The study area (Atkins)

Figure 2-2. Excerpt from Christie's monthly publication (Christie's)

Figure 2-3. Excerpt from Christie's monthly publication (Christie's)

Figure 2-4. Bennet Street (Atkins)

Figure 3-1. Christie's auction house

Figure 3-2. Horne & Harvey (Mayfair Times)

Figure 3-3. Map showing the Crown Estate's St James's Retail Policy zoning

Figure 4-1. Art businesses in St James's by principal use (Atkins)

Figure 4-2. The Institute of Contemporary Arts

Figure 4-3. MacDougall Arts (MacDougall Arts)

Figure 4-4. Atkis Gallery

Figure 4-5. Brian Haughton

Figure 4-6. Martyn Gregory

Figure 4-7. Daniel Crouch Rare Books (Daniel Crouch Rare Books)

Figure 4-8. Core concentration of art uses in St James's (Atkins)

Figure 4-9. The White Cube

Figure 4-10. Bury Street (Jamie Barras)

Figure 4-11. Hazlitt Gooden & Fox

Figure 4-12. Bernard Jacobson Gallery

Figure 4-13. Current status of art businesses recorded in the 2012 Study (Atkins)

Figure 4-14. Rollo Whately Ltd.

Figure 4-15. Stoppenbach & Delestre

Figure 4-16. Panter & Hall

Figure 4-17. Most significant challenges reported by art businesses in St James's (Atkins)

Figure 4-18. Old Masters at Colnaghi

Figure 4-19. Excerpts from marketing brochure for 21 Ryder Street (Colliers International)

Figure 4-20. Mount Street (Telegraph)

Figure 4-21. Masons Yard (Ianvisits)

Figure 4-22. 2A-6 Ryder Street (Levy LLP)

Figure 4-23. Stuart Lochhead (Stuart Lochhead)

Figure 4-24. From Stuart Lochhead's collection (Stuart Lochhead)

Figure 4-25. From Stuart Lochhead's collection (Stuart Lochhead)

Figure 4-26. Restoration by Hamish Dewar (Guardian)

Figure 4-27. Alastair Gibson (Gibson Antiques)

Figure 4-28. Chinese figure (Gibson Antiques)

Figure 4-29. Sladmore's Degas Dancers (Sladmore Gallery)

Figure 4-30. Bugatti's Two Antelopes (Sladmore Gallery)

Appendix page (clockwise from top left): Goodman Fine Art on Duke Street St James's, Duncan R. Miller Fine Arts on Bury Street, Sculpture by Paul Mount, an artist displayed at The Nine British Art on Bury Street (Beaux Arts London), Chris Beetles Ltd. on Ryder Street, Alan Wheatley Art in Masons Yard.

Back cover: Thomas Dane Gallery on Duke Street St James's.

Executive Summary

This study of art and related uses in St James's is an update of a study of galleries undertaken in 2012 by the Westminster City Planning Delivery Unit. This study considers the full range of uses in St James's, including businesses which form the core of the art market (dealing directly with arts and antiques) and businesses which play an ancillary role, such as framers, restoration and retailers selling products associated with the art market.

Desk-based research and survey and consultation with art occupiers in St James's formed the basis for examining:

- Quantity, type and distribution of art uses.
- Needs and challenges of art uses.
- Relationships between businesses.

The key findings are:

- 98 galleries, dealers, auction houses ('core' art uses) and six supporting uses (framers, restorer / conservator, art advisory and an art book shop) in St James's Special Policy Area.
- There has been growth and some turnover in art uses since 2012.
- St James's location is the most important factor to art businesses, for its reputation and cluster of art businesses. Niche retailers and high quality restaurants are complementary to the art offer.

Despite the strength of art uses in St James's to date, businesses face the following challenges and threats:

- High and increasing costs of business rates and rents.
- Encroachment of 'Big Brands', as has occurred in Mayfair.
- Safety and waste in the public realm.
- Business space suitability, with many smaller galleries occupying less visible first and second floor units which are more affordable.

These issues are compounded by volatility and long-term changes in the art market which render businesses particularly vulnerable to uncertainty, higher costs and potential decreased business.

The St James's Conservation Trust supports efforts to secure the future of the art businesses in St James's through immediate / short- and longer-term interventions concerning strategy, policy and the built environment, as follows.

Immediate / short-term recommendations include:

- Promote business visibility, particularly those occupying first and second floor units.
- Address concerns relating to safety, waste, construction impacts.
- Better communicate The Crown Estate policy to increase business confidence and trust, and encourage businesses to enter into dialogue to address challenges.

In the longer-term, the following measures should be investigated:

- Tackling high and increasing rents and business rates. A simple measure could be improving tenancy structures to halt annual rent increases.
- Protecting and improving vehicle access to galleries through public realm / highways projects.
- A coordinated strategy for art and non-art uses within St James's Special Policy Area, to identify formal and informal linkages between businesses, map out complementary and competing needs and address in a coordinated manner.



1. Introduction

Art in St James's

1.1. London owes its position amongst the top three art capitals globally to the concentration of auction houses, public and private viewing galleries, arts and antiques retailers, and associated uses in St James's. This long-established, internationally renowned art offer is a vital contributor to the UK economy, London's attractiveness to visitors, and not least to the special character of St James's.

Purpose of the Study

1.2. This study of art and related uses in St James's is an update of a similar study undertaken in 2012 by the Westminster City Planning Delivery Unit in collaboration with St James's Conservation Trust and other stakeholders (hereafter '2012 Study', Figure 1-1).

1.3. The 2012 Study responded to concerns raised by the St James's Conservation Trust that the future of art in St James's was threatened by financial and market issues and the encroachment of fashion retailers. The study established a comprehensive picture of the composition and extent of art galleries in St James's and the issues faced by businesses.

1.4. In spite of general trends for improving sales and turnover after the 2008 downturn, the 2012 Study identified the following key issues specific to the art sector in St James's:

- Expensive and increasing rents and business rates.
- The threat of fashion boutiques and high street retailers.
- Recession / economic downturn.
- Poor parking / servicing arrangements.
- The need for continued clustering of businesses and services in the area.

1.5. The 2012 Study recommended increased and coordinated communication and engagement between art stakeholders and review of existing and draft planning policy, to ensure that art uses in St James's are protected and continue to contribute to the area's special character.

1.6. Anecdotal evidence suggests that the local art sector continues to face pre-existing as well as novel pressures which include increased business rates and Brexit-related economic uncertainty. The emerging revisions to Westminster's City Plan and development of the St James's Neighbourhood Plan present an ideal opportunity to review the approach to art in the area and take action to mitigate these threats.

Study Outputs

1.7. The outputs of this study are as follows:

- A comprehensive, up to date picture of circumstances of the St James's art sector, namely the quantity, types and distribution of art uses, needs and challenges of art uses, and the relationships between businesses.
- An assessment of changes in circumstances since the 2012 Study and likely future trends.
- Recommendations for planning policy review and other measures, where necessary, to ensure that St James's distinctive art sector continues to flourish and contribute to the area's special character.

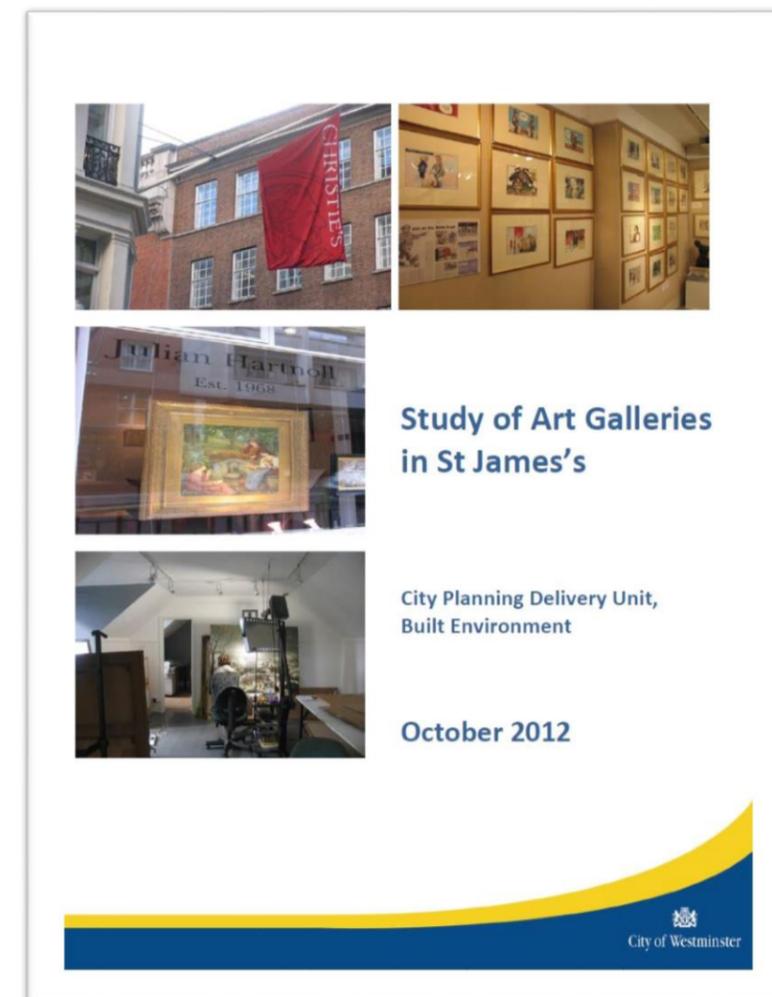


Figure 1-1. '2012 Study': previous study of art galleries catalysed by the St James's Conservation Trust in 2012.

2. Approach

Scope

Art Uses

- 2.1. The definition of art uses adopted by this study formalises and builds upon the scope of uses which emerged from the 2012 Study.
- 2.2. Although establishing a focus on 'art galleries', the 2012 Study tracked what it termed 'associated uses' such as antiques and auction houses. The study found a **diversity of uses and services** offered under the 'gallery' label, often existing within an individual business. Paired with the **interdependencies between businesses of different uses** within the local art sector which the 2012 Study identified, this renders a wide range of uses potentially integral to the success of art in St James's.
- 2.3. This study considers the full range of uses in St James's. It differentiates **businesses which form the core of the art market** (dealing directly with arts and antiques) from **businesses which play an ancillary role**, such as framers, restoration and retailers selling products associated with the art market.
- 2.4. In planning terms, both types of business may fall under the following use classes:
 - Class D1 galleries and exhibition spaces.
 - Class A1 retail galleries, retailers and antiques dealers.
 - Class B1 art-related office and workshop use.
 - Class B8 art storage and distribution uses.
 - Sui Generis Class auction houses.

Study Area

- 2.5. The study area corresponds with the St James's Special Policy Area designation, to match that used for the 2012 Study and reflect the extent of the core concentration of art uses in St James's (Figure 2-1).

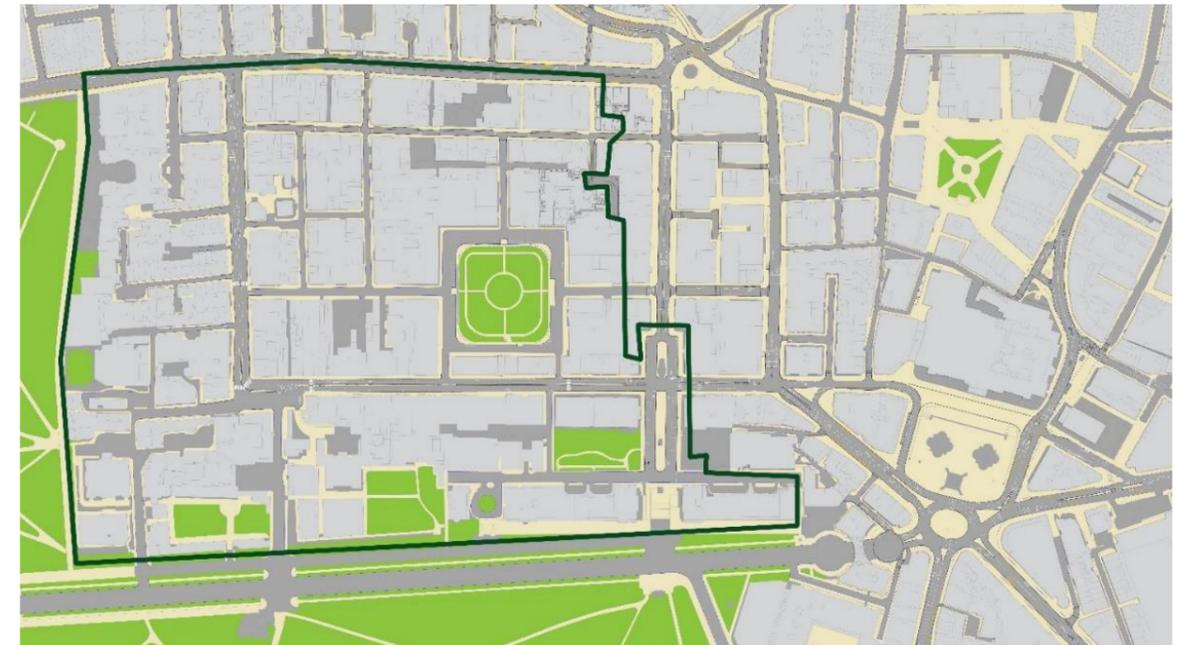


Figure 2-1. The study area: St James's Special Policy Area (SPA), outlined in green.



Figure 2-2. Excerpts from Christie's monthly publication, The Collector.



Methodology

Contextual Review

2.6. A desk-based review of relevant policies, strategies and issues at scales ranging from the city-wide to local established the context for the study. The following key documents informed the policy context:

- Draft London Plan, Mayor of London, July 2018.
- Westminster City Plan, November 2016.
- Draft Westminster City Plan 2019-2040, November 2018.
- The Crown Estate, St James's Retail Policy, 2016.

Database of Art Uses

2.7. An up-to-date database of art uses (provided in Appendix A) was prepared using the 2012 Study's database as a starting point. This list was updated to the current date and scope through desk-based research using individual gallery, art association and event websites (such as The Association of Art and Antiques Dealers and London Art Week) and consultation with local art stakeholders. An on-site survey visit undertaken in October 2018 confirmed the businesses identified.

Business Survey

2.8. A questionnaire was distributed via email to the 103 art businesses identified in the study area, which were given three weeks to respond. Respondents were assured that the information they provided would be aggregated and details of individual businesses kept confidential.

2.9. The purpose of the survey was two-fold: to confirm and elaborate on the information in the database of art uses, and to provide qualitative views of owners on current pertinent issues to their business in St James's. The survey, provided in full as Appendix B, focused on the following aspects:

- Businesses' premises and suitability.
- Opinions on the St James's location.
- Future business outlook and plans.

2.10. **25 businesses completed the survey, representing 24% of art occupiers in St James's.** The businesses represented a range of art uses in terms of principle function, specialism, tenancy arrangements, and so on. Quantitative survey results are provided in full in Appendix C.

Consultation

2.11. Survey respondents indicated their interest in participating in a more detailed discussion on issues facing art businesses in St James's. From this, interviews were held with four of the businesses, which enabled a more detailed understanding of the issues raised in the survey.

2.1. A consultation on this study with St James's Ward Councillors and the Chairman, Vice Chairman and key resident and commercial Trustees, undertaken in February 2019, commenced the discussion of actions to put its recommendations into practice.

Reporting

2.2. Chapter 5 (Findings) combines findings from the database of art uses, business survey and consultation to report on the number, nature and location of art uses, changes since the 2012 Study, and business needs and challenges. It also includes 'portraits' of some of the businesses consulted, to showcase the richness of the St James's art offer and highlight issues significant to these businesses.



Figure 2-3. Bennet Street showing the Portland Gallery, which displays modern British and Contemporary paintings.

3. Context

The UK Art Market

- 3.1. **Art is a sector in which the UK has excelled.** It is home to the second largest market and a 21% share of art and antique sales by value globally in 2016¹. Fine art dominates the UK market, accounting for 64% of sales, and the UK occupies a position of importance in global high value sales - alongside the US and China.
- 3.2. **The art market makes a significant contribution to the UK economy** through direct employment (numbering approximately 42,000 in 2016) and fiscal contributions (estimated at £1.5 billion in 2016) as well as indirectly via supporting and related sectors including conservation and restoration industries, insurance, shipping, and tourism.
- 3.3. **Nevertheless, the market is undergoing a period of uncertainty.** The British Art Market Federation reports that UK arts and antiques sales declined significantly to 2016 against a global trend for growth. This was largely attributable to large declines in the auction sector, whilst dealer sales values have been relatively stable. For example, contemporary auction sales by Christie's suffered a 39.5% drop to 2016 from a 2014 peak, a reversal of a sales boom that followed the financial crisis in 2009. Although auction sales data from 2017 indicated an uplift and improved outlook, the market remains volatile².
- 3.4. **Cross-border trade is vitally important to the success of the art market**, enabling the UK to attract the highest value works of art and a critical mass to attract international buyers. A survey of major auction houses' UK sales conducted in 2016 found that consignments from EU member states accounted for up to 25% of total value, and 20% of exports were destined to EU buyers. The art market is therefore highly exposed to trade impacts of Brexit.
- 3.5. **Growing polarisation between the highest value and smallest art dealers** is another source of uncertainty, which is masked by a general trend for stable growth in dealer sales masks. Globally between 2016 and 2017, private dealers with annual turnover above \$50m experienced 10% growth in revenues, whilst galleries with turnover below \$500,000 witnessed a 4% decrease³. In the UK, pressure on smaller dealers has been exacerbated by changes in business rates from April 2017.

Art Uses in London

- 3.6. **The concentration of arts uses in London is valued at £9.2 billion**, is key to the national art market, and puts the city in the top three art capitals in the world⁴. As reported in the 2012 Study, Central London contains many of the most renowned auction houses, public and private art viewing galleries, and concentrations of retail galleries globally, particularly in St James's and neighbouring Mayfair.
- 3.7. **St James's is home to Christie's, the world's oldest fine art auctioneer**, whilst Sotheby's is located on New Bond Street in Mayfair and Bonhams has two locations in Westminster, at New Bond Street and Knightsbridge. These long-established, internationally renowned auction houses are key players in the global art market and act as focal points for smaller retail galleries concentrated in St James's and Mayfair. Yet, as noted in the previous section, both auctioneer and smaller art dealers face market pressures and an uncertain outlook.
- 3.8. **Central London art uses face additional pressures arising from their local context.** London's Luxury Quarter was established in 2010 with the support of the New West End Company and the Heart of London Business Alliance (HOLBA). Anchored around New and Old Bond Street, the Quarter covers the historic areas of Mayfair, St James's and Piccadilly in recognition of a rich quota of luxury offerings. Here, luxury fashion retailers compete with art uses for limited business space and, as noted in the 2012 Study, won this competition in Bond Street resulting in the displacement of many galleries and dealers. The 2012 Study found the threat of displacement by fashion retailers to be a key concern of art galleries in St James's, in spite of its designation as a Special Policy Area (see Paragraphs 3.13-3.14).



Figure 3-1. Christie's auction house, established in St James's in 1766.

¹ The British Art Market 2017, British Art Market Federation, available at: <http://tbamf.org.uk/wp-content/uploads/2014/08/The-British-Art-Market-2017.pdf>

² Global Art Market Outlook 2018, Art Tactic, available at: <https://arttactic.com/product/global-art-market-outlook-2018/>

³ The Art Market 2018, Art Basel & UBS, available at: <https://www.artbasel.com/about/initiatives/the-art-market>

⁴ Culture and the economy, Mayor of London, available at: <https://www.london.gov.uk/what-we-do/arts-and-culture/london-world-city-culture-0/culture-and-economy>

Policy and Strategies

- 3.9. **Policy and strategies at scales from the national to sub-local acknowledge and seek to protect the significance of art uses in London and in St James's.**
- 3.10. **The Draft New London Plan's⁵ 'Good Growth' strategy is founded upon understanding what is valued about existing places** and using this as a catalyst for growth and place-making. It seeks to strengthen London's distinct and varied character, including through protecting heritage, specialist clusters and attractiveness to residents, visitors and businesses.
- 3.11. Art activities are a defining feature of the character of the Central Activities Zone (CAZ), of which St James's is part. Such uses are promoted in the London Plan as well as Westminster's City Plan, which protects existing arts uses and accepts the principle of new art uses (Policy S22).
- 3.12. The London Plan seeks to protect distinctive areas in a more targeted way through supporting locally-designated Special Policy Areas (SPA), 'particularly where development pressures and market could lead to the loss of valued specialist cluster of uses or functions identified as having particular significance to London's unique identity, economic function or cultural heritage'.
- 3.13. **Art galleries are a core component of the St James's SPA** designated by Westminster City Council⁶. Here, 'it is necessary to provide specific protection for the unique clusters of specialist uses which are central to London's character and ensure these clusters are not eroded by pressure from other uses' (Policy S2). Development in St James's must 'complement and enhance the area's unique character and status accommodating prestigious and renowned buildings and functions' (Policy CM2.4).
- 3.14. The SPA policy calls for the protection of existing art galleries in St James's and supports new art galleries, secured by legal agreement where appropriate. It establishes the potential for the Council to seek re-provision of existing gallery space as part of development proposals, secured by legal agreement.
- 3.15. Emerging Westminster City Council policy merges Mayfair and St James's SPAs and is set to continue to resist a net loss of gallery floorspace and support additional floorspace for use as art galleries across the areas⁷.
- 3.16. These policy points are significant as they seek to protect A1 art retail uses from conversion to other A1 uses without planning permission. Yet they are only influential where planning permission is required for other aspects of a proposal, leaving art retail uses still exposed to potential conversion. In view of this policy limitation, the London Plan recommends collaboration of landowners to achieve SPA objectives.

- 3.17. However, the adopted and emerging SPA policy presents potentially conflicting objectives. Niche retail uses are also considered integral to the character of St James's, and the policy encourages new niche luxury and specialist retail development. This includes antiques, which would be a boost to art uses. Yet non-antique retail uses such as luxury fashion are also promoted under this policy, and this could exacerbate the displacement of art uses from St James's. Current policy does not delineate how objectives should be balanced.



Figure 3-2. Horne & Harvey featured in the Mayfair Times. In response to policy seeking to protect art uses, the estate agency established itself with a permanent art exhibition.

⁵ Draft London Plan, Mayor of London, July 2018, available at: https://www.london.gov.uk/sites/default/files/draft_london_plan_-_showing_minor_suggested_changes_july_2018.pdf

⁶ Westminster City Plan 2016, November 2016, available at: <https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies>

⁷ Westminster City Plan 2019-2040 (consultation draft), November 2018, available at: <https://www.westminster.gov.uk/cityplan2040>

3.18. **The Crown Estate, as a major (though not the sole) landowner in St James's, plays a critical role in the promotion of art uses** and achievement of objectives for the area under the SPA policy set out above.

3.19. The Crown Estate seeks a balance between art and antiques and other retail uses through its retail zoning strategy, and intends to work with other landowners in the area to encourage the adoption of similar principles for their own retail properties. Promoting the area to enhance St James's status as global leader of the trade in the fine art and antiques and recognise this contribution to cultural heritage has been a key aim of the Crown Estate, established in its Visual Arts and Antiques Strategy⁸.

3.20. Under the Retail Policy⁹, retailers in 'Historic St James's' (comprising a western area of St James's shown in Figure 3-3) should consolidate or complement St James's status as a global leader in fine art and antiques, and high quality and renowned arts and antiques operators will be encouraged in this area above other parts of the Estate.

3.21. The Crown Estate also promotes art tenants in St James's through organising promotional events (which may make use of art work) to attract visitors to the area, art masterclasses where businesses are invited to host to showcase their specialism, and briefings and meetings which encourage knowledge-sharing between local businesses.

Summary

3.22. Art businesses in St James's benefit from the historical strength of the UK and local art market and specific protection through local policies and the Crown Estate strategy, which recognise the importance of art to the area.

3.23. On the other hand, **policies are not all-inclusive. They leave art uses exposed to competition for space from luxury and niche retailers and potential changes of use where planning permission is not required.** The ability of policy to promote the interests of art uses in St James's depends significantly on planners' and landowners' discretion.

3.24. With the current high degree of uncertainty surrounding the future of the art market, efforts to protect art uses and provide assurance that business needs are met is likely to become increasingly important.



Figure 3-3. Map showing The Crown Estate's 2016 St James's Retail Policy zoning.

⁸ Redefining refined: St James's retail, The Crown Estate

⁹ St James's Retail Policy 2016, The Crown Estate, available at: https://www.thecrownestate.co.uk/media/2487/stj_retailpolicy_october2016.pdf

4. Findings

Number and Type of Art Uses

- 4.1. **There are a total of 103 art businesses in the study area. The vast majority of these (98 businesses) are core art uses** which deal directly with arts and antiques. Of the core art uses, **82 are principally retail galleries**, 10 are dealers (without exhibition space), three are display galleries, and two are auction houses.
- 4.2. It is important to note that categorising businesses by principal use does not capture the full range of services which may be offered by an individual business. As an example, MacDougall Arts at 33 St James's Square is classed as a retail gallery, but is also an art dealer and auction house. Many core art uses have in-house ancillary services, such as restoration and conservation of works of art. That 25% of business survey respondents reported offering multiple services indicates the prevalence of this phenomenon.
- 4.3. Nor does the categorisation showcase the diversity of the St James's offer within a single category of use. Retail galleries have a variety of individual specialisms, which may be related to origin (e.g. Oriental, East Asian) or medium (e.g. sculpture, ceramic, painting) of works of art. Of particular note are niche retail galleries specialising in antique books (Daniel Crouch Rare Books), furniture (Mackinnon Fine Furniture), and armour (The Armoury of St James's). A small selection of St James's specialists is on Page 12.
- 4.4. **The study recorded six businesses offering ancillary products or services.** These comprise expert skills in art advisory, framing, restoration and conservation, and sale of art books.

Figure 4-1. Art businesses in St James's by principal use

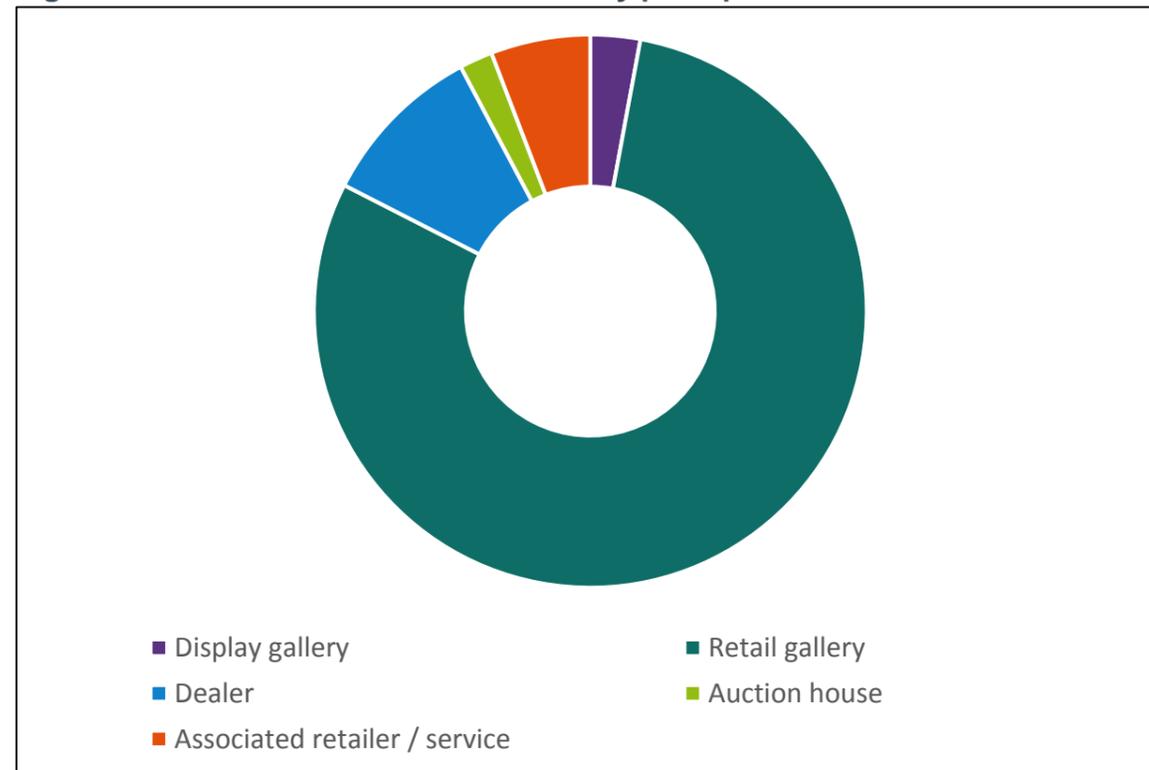


Figure 4-2. The Institute of Contemporary Arts, a display gallery on The Mall.



Figure 4-3. The gallery space and an auction underway at MacDougall Arts, St James's Square.



Figure 4-4. Aktis, 10-11 Park Place, a retail gallery dealing solely in 20th century nonconformist Russian art.



Figure 4-6. Martyn Gregory on Bury Street, specialist in China Trade Paintings and pictures relating to the Far East.



Figure 4-5. Brian Haughton, a commercial gallery on Duke Street St James's specialising in European ceramics from the 16th to the mid-19th centuries.



Figure 4-7. Daniel Crouch Rare Books on Bury Street, specialising in maps and atlases from the fifteenth to nineteenth centuries.

Location of Art Uses

- 4.5. Art uses are clustered in the western part of St James's (Figure 4-8). The most significant street for art uses is Bury Street, home to 31 businesses.
- 4.6. There are 16 art uses on Duke Street St James's, 13 in Masons Yard and eight on Ryder Street. Other addresses which host significant numbers of art uses in the study area are Jermyn Street, King Street and St James's Street.

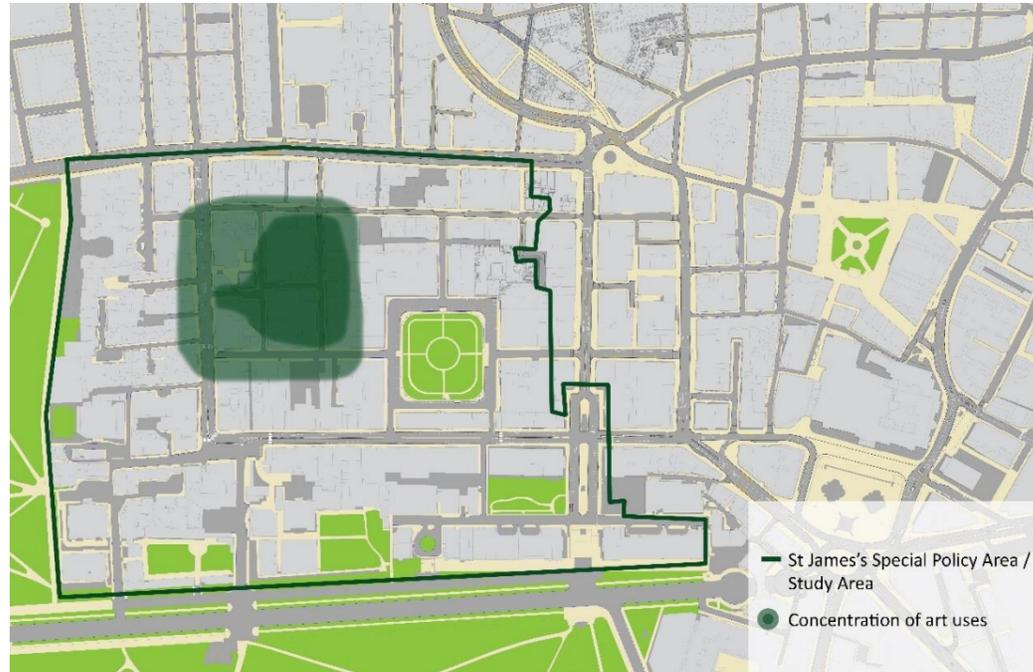


Figure 4-8. Core concentration of art uses in St James's.



Figure 4-9. The White Cube, a display gallery positioned at the centre of the Masons Yard cluster of mainly small retail galleries.



Figure 4-10. Bury Street, a core street in the St James's art market.

Change Over Time

- 4.7. **The St James's art market is underpinned by a majority of occupiers who have remained in place over a long period of time.** 68% of business respondents to the survey have been in their premises at least 10 years, with over half of these in place for over 20 years.
- 4.8. Some of these long-term resident businesses have evolved, changing their principal use whilst remaining in their original location. The example of St James's Art Books in Piccadilly Arcade is detailed in Paragraph 4.20.
- 4.9. **St James's continues to see some turnover and arrival of new businesses,** particularly those relocating from Mayfair (a trend reported on further in Paragraph 4.37). 28% of businesses surveyed established themselves in their current location less than 3 years ago.
- 4.10. **Since 2012, there appears to have been a net growth in galleries numbering 12, an increase of approximately 17%.** The spatial concentration of art uses has not changed. Bury, Duke and Ryder Streets and Masons Yard continue to host the majority of galleries. The locations in St James's which have experienced the most change are the Arcades, with the closure of two art uses.
- 4.11. However, as mentioned in the Methodology (Chapter 2), the database of art uses presented here is complete to the researcher's knowledge in absence of a definitive database. This study has identified some businesses which were existing in 2012 but for whatever reason were not logged in the previous study. This makes it difficult to draw robust conclusions through comparing numbers of art uses in St James's identified by the two studies.
- 4.12. Also, whilst highlighting the importance of supporting uses, the 2012 Study did not catalogue them. This limits quantitative assessment of changes to gallery and auction uses.
- 4.13. In supporting uses, the 2012 Study did note one dedicated framer remaining in St James's, whilst this study recorded three framers (John Davies Framing, Arnold Wiggins & Sons, and Rollo Whately Ltd). This is encouraging anecdotal evidence that St James's remains home to specialist skills critical to the functioning of the art market.



Figure 4-11. Hazlitt Gooden & Fox on Bury Street, art dealer to the Queen and major international institutions founded in 1752.



Figure 4-12. The home of Bernard Jacobson Gallery since 2015. The new space comprises the ground and lower ground floor of the mid-century French Railways House on Duke Street St James's.

- 4.14. A more robust understanding of trends can be obtained through reviewing the status of the art uses identified in the 2012 Study (Figure 4-13). **Of the 70 businesses in the 2012 Study database, 52 are still operational in St James's**, including three which have expanded their premises and eight which have moved location within the study area. Seven businesses are no longer in St James's, having moved to Kensington, Bloomsbury, Mayfair, Richmond and Kent. **11 businesses appear to have closed.** Table 1 summarises art uses which have experienced change since the 2012 Study (complete list is provided in Appendix A).
- 4.15. St James's looks to maintain its concentration of art uses going forward. 92% of businesses surveyed reported that they are 'satisfied' or 'very satisfied' with being located in St James's, and none reported plans to leave the area. Nevertheless, art businesses are facing significant challenges, discussed in Paragraphs 4.31-4.52, which could threaten their ability to remain in St James's in future.

Figure 4-13. Current status of art businesses recorded in the 2012 Study, as a proportion of the total recorded in 2012.

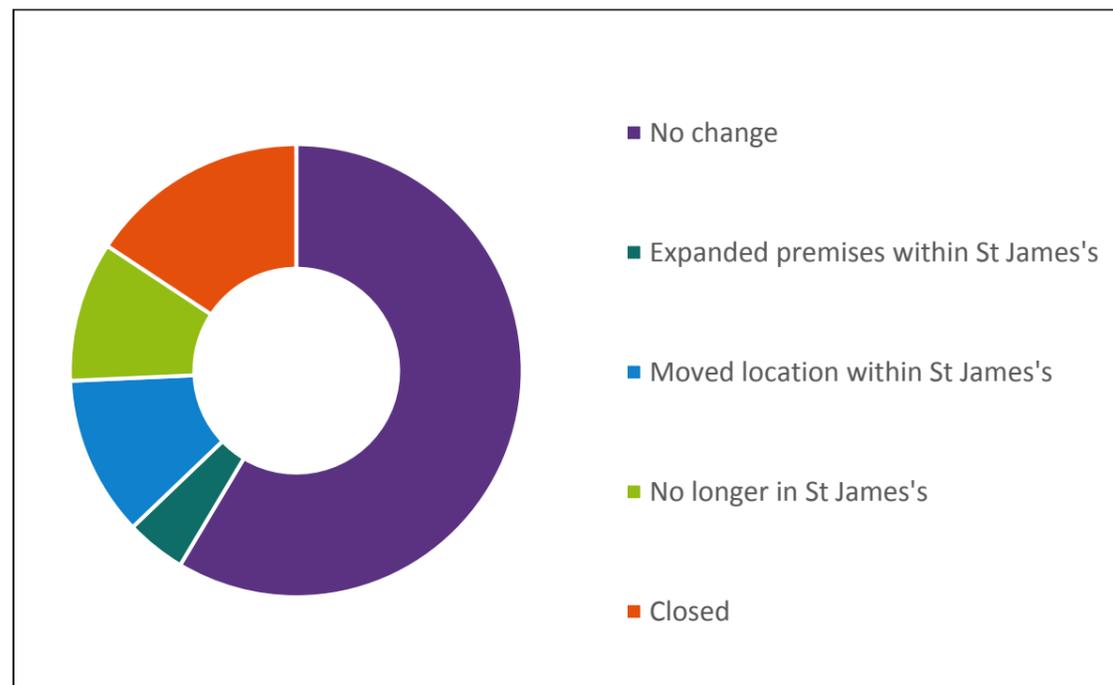


Table 1. Changes in art businesses identified in the 2012 Study.

Change since 2012	Businesses	Count
Expanded premises within St James's	Thomas Dane Gallery Aktis Gallery Moretti Fine Art	3
Moved location within St James's	Portland Gallery Panter & Hall Sims Reed Gallery Trafalgar Galleries Derek Johns Macconnal-Mason Robert Bowman Modern Grosvenor Gallery	8
No longer in St James's	Alla Bulyanskaya J Van Haefen Obsidian Frost & Reed Peter Nahum The O'Shea Gallery Isacc & Ede	7
Closed	Asian Art Bill Thompson Albany Gallery N R Omell Asian Art Gallery Julian Hartnoll Duke Street Gallery Brisigotti Celadon Art Gallery Robert Cox Olyvia Oriental Amells	11

Business Needs

4.16. The top requirements for art businesses in St James's fall under the following categories, listed in descending order of importance:

- **St James's location**, offering proximity to similar and complementary businesses and attractiveness to clients.
- **Having physical premises** with secure retail and storage space.
- **Vehicle access.**

St James's Location

4.17. **Being located in St James's is the most important need of art occupiers**, with 96% of survey respondents deeming this 'essential' or 'of high importance' to their business. This is due to a number of interlinked attributes which the area offers.

"St James's is the ideal location for any serious art business."

4.18. **St James's is important first and foremost because of the area's prestigious reputation**, cited by 24 of the 25 respondents. St James's offers businesses a place "at the heart of the art world" which enables them to attract higher calibre artists and overseas art customers who are drawn to the area. A St James's address ensures business credibility, which is increasingly seen as essential as online sales grow in importance.

"A highly important niche area for the art world, attracting the best clientele from around the world."

4.19. **Businesses also benefit from St James's' cluster of art and supporting uses.** The cluster of businesses in the art market makes the area a "melting pot for the art world", where businesses benefit from knowledge-sharing and formal and informal linkages. 16 of the 25 respondents reported that proximity to similar businesses underpinned their decision to locate in St James's, and 80% deemed it 'of high importance' or 'essential' to their business. This feature of the St James's art market was also identified in the 2012 Study.

4.20. The art cluster also promotes longevity of individual businesses, as they are better able to adapt to market changes. A prime example is St James's Art Books, which opened in 1993 as an art reference bookshop and has since morphed into an art gallery. This transition was facilitated by its ability to tap into expertise gained from being located at the centre of the art world.

4.21. The cluster effect of informal networks appears to be more important to businesses in St James's than its offer of supply chain relationships. Less than 20% of survey respondents consider that proximity to suppliers is key to their location in St James's, and 64% of businesses stated that the attribute is of no more than 'low importance' to their business. Nevertheless, galleries and dealers do benefit from operational links with Christie's and local framers.

"We work closely with other art galleries in the area and of course with Christie's auction house."

4.22. **Non-art businesses play an important role in the cluster.** They contribute to the distinctive character of St James's and provide services which encourage potential clients to visit and linger. Galleries reported that their customers are drawn to specialist retailers such as Dunhill Tobacco and services such as barbers. Art dealings make use of complementary businesses, such as galleries and dealers entertaining clients at St James's high-quality restaurants.

"We often have clients visiting us who arrange to go to Wiltons after visiting us, or to pick up their favourite shaving foam or go to get their cigars. So we think we are part of a symbiotic environment."

4.23. **Thirdly, businesses benefit from the accessibility of St James's as a central London location.** 13 of 25 survey respondents stated this as a key factor in their business location. It enables businesses to benefit from passing trade and facilitates commuting by employees.

4.24. As described above, the area's prestige, concentration of art and complementary uses, and convenient central London location are interdependent and mutually reinforcing. Art businesses and specialist retailers are drawn to St James's for its reputation. Once in place, they benefit from and contribute to the cluster of uses. Paired with its accessibility, these factors attract potential clients to the area. Proximity to customers is 'of high importance' or 'essential' to 68% of survey respondents and is a key factor in the St James's location for more than half of businesses surveyed.

"The shop front in such a prestigious area attracts new clients who may be passing by or visiting other premises."



Figure 4-14. Rollo Whately Ltd., a framer off St James's Street which serves local museums, picture dealers and auction houses, as well as private individuals and galleries abroad.

Physical Premises

- 4.25. **Art businesses place importance on having a physical presence and premises,** 'essential' to 44% of businesses and 'of high importance' to 36%.

"A physical shop is still essential [because] our business centres around personal client contact and relationships."

- 4.26. **This demand has held up in spite of increasing online business presence and sales,** which are 'essential' to 40% of businesses and 'of high importance' to 16%. In fact, this trend accentuates the importance of having a physical retail premises to give businesses credibility and play an "interdependent" role with their online presence, enabling internet customers to view pieces in person before purchase.

"We do also place importance on an online presence - as it is often the initial point of contact for new clients, who then, due to the high value of our pieces, then come to St. James's to view the pieces before making decisions."

- 4.27. **The St James's location, with its prestige and cluster of uses offering convenience for clients, enables art businesses to maximise the benefits of their premises.**

- 4.28. Outside of locational factors, the key requirement from a physical premises is security - 'essential' or 'of high importance' to 80% of businesses. Storage space is 'essential' or 'of high importance' to over 50% of businesses.

Accessibility

- 4.29. **A pleasant pedestrian environment unlocks the benefits of passing trade** to businesses' physical premises. Alongside the art and specialty business offer, it contributes to the character and attractiveness of St James's as a destination for potential art customers.

- 4.30. **Vehicle access and parking is another need of art businesses,** with 24% of survey respondents deeming it 'essential' and a further 60% regarding it as important. It facilitates visits from clients and deliveries and collections of bulky stock, which can occur as frequently as every day.

"Our clients do not use public transport...they come from overseas and may stay in a local hotel, and walk to us or get a taxi. Or they may take a private driver for the day, so we do need free flowing access and the possibility of cars being able to pull in to drop off."



Figure 4-15. Secure shopfront of Stoppenbach & Delestre Ltd., dealers in French 19th and 20th century art based in Ryder Street.

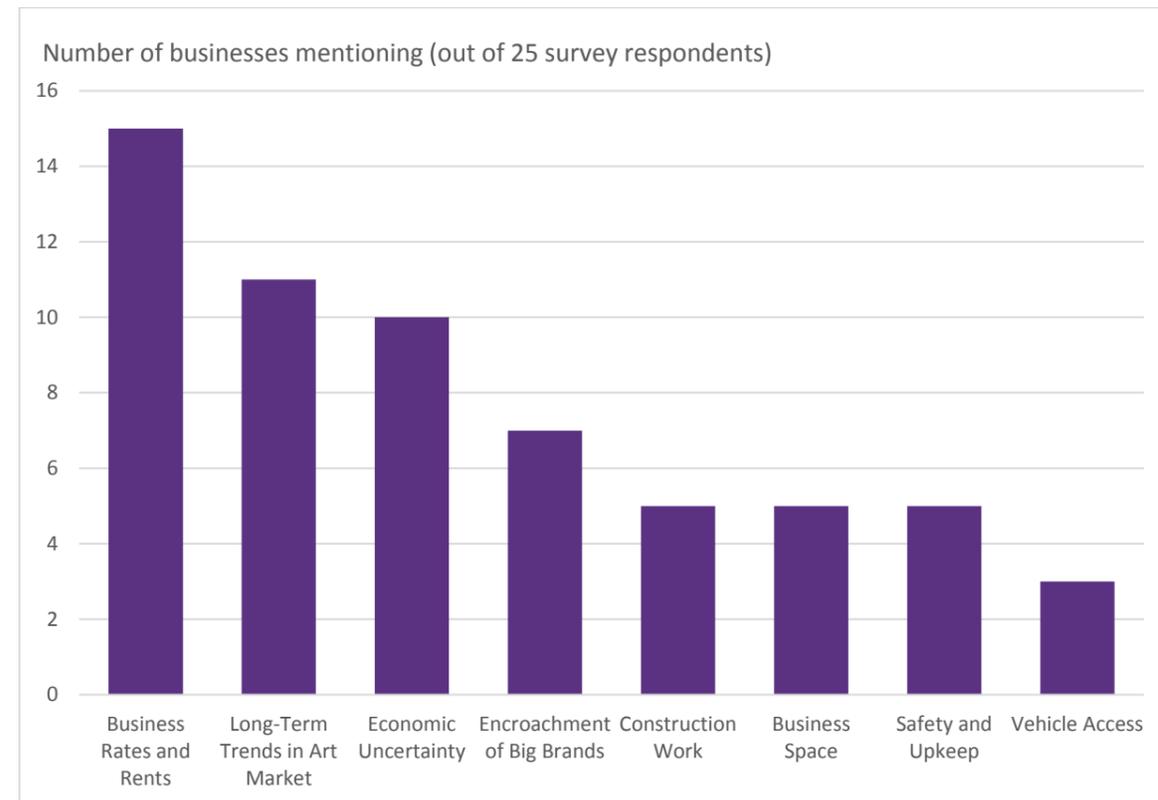


Figure 4-16. Pedestrians passing Panter & Hall, a retail gallery exhibiting works by modern and contemporary British and European artists, on Pall Mall.

Challenges

- 4.31. **The single greatest challenge to art businesses in St James's is the high and increasing cost of business rates and rents.** Businesses' next most significant concern is economic uncertainty and trends in the art market.
- 4.32. Other concerns specific to art in St James's relate to the potential encroachment of luxury retailers which replace art uses and are detrimental to St James's special character, the public realm, and business space.

Figure 4-17. Most significant challenges reported by art businesses in St James's.



Art Market

- 4.33. **The art market is highly volatile**, and businesses expect a cyclical downturn in 2019. Economic downturn and recession was identified as a significant threat to businesses in the 2012 Study, particularly affecting the lower and middle priced part of the market.
- 4.34. Today, Brexit is the greatest source of concern, with as yet uncertain impacts on import duties, export and the ability of international clients to purchase works of art, and London's position as a centre for art.
- 4.35. Longer-term trends in the art market are of equal concern to art businesses in St James's, and include:
- **Increasing prevalence of online sales** which dealers must compete with – *“the internet is now completely saturated with fake, second rate and simply bad art work”*.
 - **Impact of regulation** such as the Ivory Ban which affects sale of old ivory works of art.
 - **Contracting market** for Old Master and English pictures, which particularly affects St James's as a hub for this genre of art.
 - **Ageing dealers** and lack of a younger generation attracted to art dealership to replace them.
- 4.36. These issues, which are outside of the scope of this study, render businesses particularly vulnerable to the other challenges detailed below. This reinforces the importance of taking special measures to protect art in St James's.

“We need stability to really continue to function without concern and to be able to plan the future.”



Figure 4-18. Old Masters on display at Colnaghi, 26 Bury Street. Businesses in St James's report that this genre of art is experiencing a contraction in demand.

Increasing Cost of Business Rates and Rents

4.37. **The high and increasing cost of operating in St James's due to business rates and rents is the biggest threat to art businesses.** This issue was raised by 15 of the 25 survey respondents, and almost a third of businesses reported being dissatisfied with the cost of their premises. Respondents attributed this issue to increased demand from art galleries relocating to escape high rents in Mayfair, government policy on business rates, and some unsympathetic landlords. One retail gallery reported difficulty obtaining a shorthold tenancy, leaving the business facing annual rent reviews which have resulted in increases of around 10% each year.

4.38. **This situation has remained unchanged since 2012**, when the study reported significant rises in rents at rent review stages in individual leases, disputes over the assessment methods of managing agents, and the departure of galleries unable to cover costs.

"The advantages of cachet will be eventually obliterated by the combined costs of rates and rents in the area."

4.39. **With today's art market challenges, having a physical gallery space in a prime location is "more important than ever** to promote face to face interaction with clients" and showcase the collections of high quality, specialist dealers. Lack of affordable physical space does not only threaten the character of St James's but London's status in the global art market.

"There is so much competition - especially with the internet and artists having their own websites - that committing to a space - while a great idea - is not always the most commercially viable solution for the business... I remain committed to having the space for the time being, but as a young gallery it is not easy to juggle all of the costs."

4.40. **High rents and business rates can be powerful forces for replacement of art businesses by high fashion retailers which are able to afford them** - an issue identified in the 2012 Study and discussed further below.

21
Ryder Street
Gallery

891 SQ FT / 82 SQ M
AVAILABLE NOW



Floor Areas

The premises are arranged over ground floor and basement and will provide the following approximate net internal areas:

Floor	sq ft	sq m
Ground Floor	385	35
Basement	506	47
Total	891	82

Tenure

Available on a new 10-year lease with a rent review at expiry of the 5th year. The lease will be drafted on The Crown Estate's standard terms and will be contracted outside of the Landlord and Tenant Act 1954.

Rent

£60,000 per annum exclusive.

Rates

The premises have not yet been assessed for rating purposes. Interested parties are advised to make their own enquiries.

EPC

An EPC is available on request.

Figure 4-19. Excerpts from the marketing brochure for an art gallery unit at 21 Ryder Street, to let at the time of writing.

Encroachment of "Big Brands"

4.41. **Art occupiers are concerned about displacement of businesses from St James's, which threatens the brand and character of St James's as well as the network of galleries and supporting uses** – both being key factors upon which art businesses depend (as seen on Page 16). Almost one third of respondents raised this issue, which is consistent with the level of raised in the 2012 Study. Businesses are not only concerned about the displacement of art and associated businesses but also of established independent bars and restaurants which retain art buyers in the area.

"I worry about the fragility of our eco-system."

4.42. **Mayfair was frequently cited as a warning of what St James's could become in event of replacement of art uses by luxury retailers and "big brands"**. Art businesses are anxious that St James's avoids a fate similar to those of Bond Street and Cork Street, which used to be the centre of contemporary galleries in London but has now "changed out of all recognition".

4.43. The 2012 Study reported businesses voicing concerns over the priorities and strategy of landowners, who they perceived to be encouraging the pricing out of galleries from St James's. Participants to this study indicated that this situation has improved and there is greater recognition by landowners of the need to protect and promote galleries. The Crown Estate's 2016 Retail Policy zoning designation attests to this approach, though most businesses do not seem to be aware of the policy per se.

4.44. Nevertheless, respondents regard some recent decisions by landowners to be detrimental to St James's' special character. These include the intrusion of big brands into the Piccadilly Arcade and The Marq development on Duke Street St James's, which removed Greens Bar and Restaurant and failed to seize an opportunity to provide new gallery space.

"When the art dealers are all finally gone the area will have lost much of its charm."



Figure 4-20. Mount Street, Mayfair, where luxury brands have displaced art uses.

Public Realm

- 4.45. **Respondents have concerns relating to access, amenity and safety in St James's.** Largely a new development since the 2012 Study, this raises obvious concerns about how effectively the special character of St James's is being protected and promoted.
- 4.46. **Construction work is the key issue of concern.** One fifth of respondents gave evidence of the following detrimental impacts of nearby construction on their business:
- Impedes pedestrian and vehicle access by customers.
 - Scaffolding reduces the visibility of businesses, which is a particular blow to those which pay a rent premium for a unit offering visibility from the street.
 - Generates damaging dirt and residue.
 - Negative amenity impacts – including noise, dust and “swearing workmen” - affect local employees and put off potential customers.
- “We were not warned about the constant construction works that began immediately after moving in, which has reduced our business substantially.”*
- 4.47. **The second most pressing public realm concern is upkeep and safety.** Businesses in Masons Yard expressed concern about “blatant” drug usage during the daytime, which could act as a significant deterrent to customers. Away from Masons Yard, rubbish collection arrangements - which are designed to suit restaurant rather than art gallery needs - result in pile-up of rubbish in the street.
- 4.48. **Finally, vehicle access and parking could be improved** to facilitate customer access and unloading for exhibitions. However, that this was only raised by three respondents may be evidence of the success of the 2012 Study - where one quarter of respondents highlighted it as a hindrance - in promoting the needs of art uses.

“I have received several parking tickets when unloading/setting up for exhibitions. More loading bays outside galleries would be desirable.”

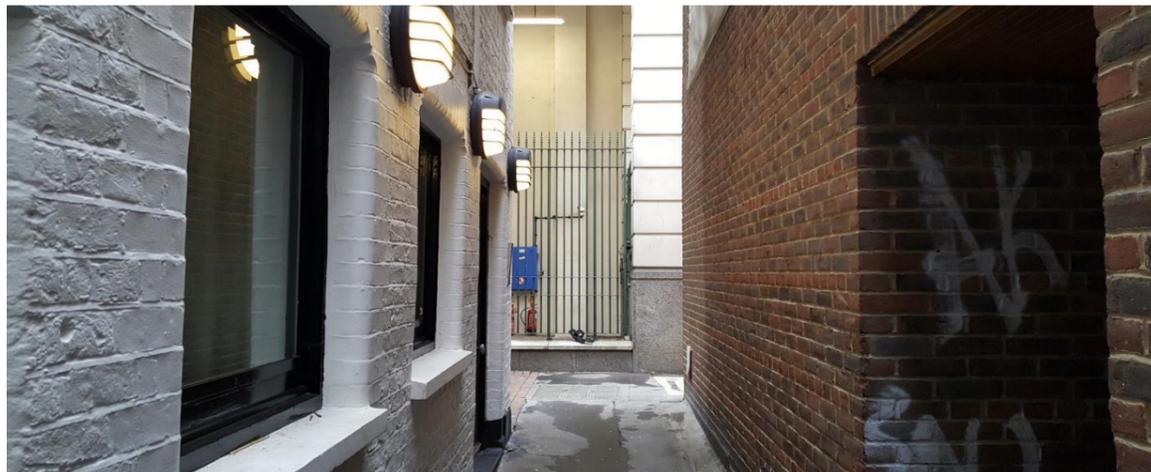


Figure 4-21. Graffiti and drug usage in Masons Yard is a source of safety concerns.

Business Space

- 4.49. **Although most businesses in St James's are content with the size of premises - 80% reported being 'satisfied' or 'very satisfied' with the size of their premises - 8% of respondents were 'dissatisfied' or 'very dissatisfied'.** This significant minority of businesses would benefit from larger space for storage and display of more sizeable pieces of art.
- 4.50. **At the other end of the scale, there is significant demand - exceeding supply - for small business spaces.** This is likely related to St James's desirability paired with its high rents. In this context, the availability of small spaces is integral to St James's character and art offer. It is a key factor supporting independent art businesses and differentiates the area from Mayfair, where more generous business spaces with large frontages lend themselves to larger brand galleries and conversion to luxury fashion uses.
- 4.51. **Moreover, there is a shortage of small business spaces which are fit-for-purpose.** Many of the smaller spaces available in St James's are located on first and second floors which means that their occupiers, usually independent art dealers and galleries, suffer from lower visibility and footfall. Other issues with such spaces include low levels of lighting and insufficient storage space. Layout of premises, which has security implications, is another concern for businesses.
- 4.52. The 2012 Study does not mention concerns relating to business space, suggesting that the issue has emerged from continuous supply-demand imbalance and cost increases in business space in the intervening years.



Figure 4-22. 2A-6 Ryder Street. No 6. alone is home to three small retail galleries, illustrating the high demand for business space.

Business Portraits

Stuart Lochhead Sculpture

USE CLASS: RETAIL GALLERY, OFFICE | ADDRESS: 35 BURY STREET | HOURS: BY APPOINTMENT

The Business: Stuart Lochhead Sculpture covers all media and periods from antiquity to the 20th century. The works of art are united by their rarity, integrity and beauty.

The Location: Stuart Lochhead Sculpture occupies the first floor of Grade II listed Bury House (35 Bury Street). Having worked in Jermyn Street and Mayfair, Stuart established his gallery in June 2018 in St James's, attracted by its concentration of art uses and distinctive character.

"St James's retains an original character and has been associated with the art trade for many years. When so many other areas of London are losing their individuality, St James's has kept a special feeling. This is appreciated by all those who work here and visit."

Outlook: St James's special character is a key draw to art businesses and clientele, who place a high value on sense of place. This is related to its concentrations of art galleries and independent luxury retailers, which need to be recognised as distinct but mutually supporting uses and protected against the homogenisation affecting so many of London's commercial streets.



Figure 4-23. Stuart Lochhead (left), Figures 4-24, 4-25. Works from his collection: Pioche's terracotta woman leaning against a funerary urn (left) and Clesinger's graceful Bacchante (right).

Hamish Dewar Ltd.

USE CLASS: OFFICE / WORKSHOP | ADDRESS: 14 MASONS YARD | HOURS: BY APPOINTMENT

The Business: Hamish Dewar Ltd. is a highly regarded conservator and restorer of paintings, established in 1980.

The Location: Operating from Masons Yard for the past 20 years, Hamish Dewar benefits from proximity to dealers, auction houses and businesses offering other supporting services, particularly framing. The location boasts a critical mass of art uses which is convenient for clients.

"Hub of the art market."

Outlook: High rents and business rates are significant deterrents to art businesses, particularly in the context of Brexit-related economic uncertainty. Nevertheless, the attractiveness of St James's as a location means demand for premises continues to exceed supply. There is a shortage of cheaper, smaller, first and second floor gallery spaces.



Figure 4-26. Restoration of a portrait of Winston Churchill by Oswald Birley (1951) undertaken by Hamish Dewar in 2015. Prior to its restoration, the painting was sold at auction in Sotheby's.

Gibson Antiques

USE CLASS: RETAIL GALLERY, OFFICE | ADDRESS: 10 BURY STREET | HOURS: BY APPOINTMENT

The Business: Gibson Antiques was established in 2008 by Alastair Gibson, former Director and Head of Sotheby's Chinese & Japanese Ceramics and Works of Art department for London and Europe. Dealing in Oriental ceramics and works of art, Gibson Antiques also exhibits at prominent international fairs, acts as consultant to auction houses and antiques shows, and offers valuation services to companies and individuals.

The Location: St James's remains the most impressive location in London for art businesses, and one for which smaller dealers are willing to make concessions on other needs, such as size of business space.

Premises is "cramped, but still in St James's."

Outlook: The future of specialist independent dealers is threatened by competition from online auctions and high rents which make St James's increasingly inaccessible. Many small businesses resort to occupying upper floor premises where they receive lower footfall and operate by appointment only. Gibson expects growing numbers to leave altogether, to conduct business solely online and through fairs.



Figure 4-27. Alastair Gibson exhibiting pieces from his collection (left), Figure 4-28. A late 19th century Chinese figure of a standing Goddess of Mercy (right).

The Sladmore Gallery

USE CLASS: RETAIL GALLERY, OFFICE, WITH STORAGE SPACE | ADDRESS: 57 JERMYN STREET
HOURS: MON-THURS 10AM-6PM, FRIDAY 10AM-5PM, WEEKENDS AND EVENINGS BY APPOINTMENT

The Business: The family-run Sladmore Gallery specialises in European sculpture produced between 1840 and 1940. Sladmore has strong links to businesses in Jermyn Street, St James's and Mayfair, as well as a global reach which includes customers, suppliers and museums in New York, Paris, Belgium, Chile and Argentina. In 2016, the gallery was ranked 63rd in the Sunday Times' UK-wide list of small and medium enterprises with the fastest-growing international sales.

The Location: The art cluster of St James's presented the ideal location for Sladmore to expand their antique offer, through opening a gallery on Jermyn Street 11 years ago. Their original Mayfair gallery specialises in contemporary art.

"We just want St. James's to really not become another high street with the same retailers. We really want St. James's protected as its own specialist district, as the health of all our businesses within it rely on that protection...none of us would be as successful in the middle of a homogenous high street."

Outlook: There has been a significant positive shift in the promotion of art in St James's over the past couple of years. A programme including masterclasses, evening walks and live music at St James's Market attracts visitors to the area and enables galleries to showcase their works. However, ongoing issues, such as waste collection and traffic congestion, remain insufficiently addressed. The distinct needs of art businesses, restaurants and niche retailers need to be recognised and must all be included to find effective solutions.



Figure 4-29. Degas Dancer sculptures, currently on loan as part of Sladmore's active international loan programme (left), Figure 4-30. Sladmore is an international specialist in Bugatti, whose Two Antelopes piece is pictured (right).

5. Conclusions and Recommendations

Summary of Findings

- 5.1. **There are 98 core art businesses in St James's Special Policy Area.** Of these, 82 businesses are principally retail galleries, 10 are dealers, three are display galleries and two are auction houses. Quantitative information cannot capture the extraordinary diversity of St James's art offer; businesses have a variety of individual specialisms, spanning origin, period, medium and form of art work.
- 5.2. **There are also six businesses offering products or services ancillary to art:** three framers, one restorer / conservator, an art advisory and an art book shop.
- 5.3. There is high degree of crossover within these uses; individual businesses frequently offer a mix of core and ancillary services.
- 5.4. **Art businesses in St James's form part of an 'ecosystem' comprising core art uses and supporting art and non-art uses** – the latter including niche retailers and high-quality restaurants. All businesses depend on and contribute to the area's cluster of uses, special character and prestigious reputation. The cluster is centred around the western part of St James's, particularly Bury Street, Duke Street, Masons Yard and Ryder Street.
- 5.5. The credibility that a St James's address guarantees an art business is ever-more important with the growth of online sales. Having a secure, visible and accessible premises in St James's enables art businesses to benefit from passing trade of clientele drawn to the area, showcase their works of art to customers before purchase, and maintain informal relationships with businesses within the art cluster.
- 5.6. **The majority of occupiers in St James's have remained in the area** over a long period of time and plan to stay for the foreseeable future. Since 2012, there has been a net growth of 12 galleries and a perceived improvement in efforts by landowners to retain art uses in the area.
- 5.7. **Despite its strength to date, this 'ecosystem' is extremely delicate. Its future hangs in the balance due to the high and increasing costs of business rates and rents** which threaten the ability of the businesses central to its character to remain in St James's. As a result, businesses may compromise on premises in order to remain in St James's. Smaller, independent galleries and dealers take up cramped first and second floor spaces where their business suffers from lower visibility and footfall.
- 5.8. Art market volatility and long-term changes render businesses particularly vulnerable to the uncertainty, greater cost and potential decreased business - due to inadequate premises – which result from rising rents and rates.

St James's Conservation Trust Recommendations

- 5.9. The St James's Conservation Trust supports efforts to secure the future of the art businesses in St James's through immediate / short- and longer-term interventions concerning strategy, policy and the built environment. Sustaining art businesses is of critical importance not only to the special character of St James's, but to the continued appeal of art employment to the younger generation – a challenge identified by businesses - and London's position in the global art market.
- 5.10. Immediate- / short-term actions to better meet the needs of art businesses and mitigate challenges are:
- **Better communicate The Crown Estate policy.** Although businesses feel that in recent years their needs have been better understood by landowners and planners, there was a low level of awareness of the specific zoning to protect the art cluster. Greater awareness would increase business confidence and trust, encouraging businesses to enter into dialogue on other challenges.
 - **Address concerns about safety** in Masons Yard, such as through CCTV or patrols.
 - **Seek improved solution for waste collection** which rationalises collection whilst accommodating the differing needs of restaurants and art uses.
 - **Improve communication about construction work** to identify negative impacts on businesses and potential mitigation measures, considering use of contractor training.
 - **Promote the visibility of businesses** occupying first and second floor units, and of businesses affected by construction works. Generalised improved publicity for art uses could be promoted by the St James's Conservation Trust and landowners.
 - **Seek improved provision of storage space** in St James's for art businesses.
- 5.11. Longer-term actions to protect art businesses and the 'ecosystem' on which they depend should investigate:
- **Tackling high and increasing costs through interventions concerning rents and/or business rates.** A simple measure could be improving tenancy structures to halt annual rent increases. Measures to protect art uses in Mayfair may relieve demand pressure on business space in St James's.
 - **Protecting and improving vehicle access** to galleries through public realm / highways projects, with measures that mitigate traffic and protect pedestrian amenity.
 - **A coordinated strategy for art and non-art uses** within St James's Special Policy Area. Identify formal and informal linkages between businesses, map out complementary and competing needs and address in a coordinated manner, including through improved communication / collaboration between art and non-art businesses and encouraging landlords to follow The Crown Estate's example in promoting art uses.

Appendices



Appendix A. Database of Art Uses

- Table 2 is a database of art uses in St James's established through desk-based research using individual gallery, art association and event websites, and consultation with local art stakeholders. An on-site survey visit undertaken in late October 2018 confirmed the businesses identified.
- **Businesses are categorised by principal use.** Core art uses are display gallery, retail gallery, dealer (retail / office use without permanent exhibition space on site) and auction houses. Ancillary uses – 'associated retailers / services' - include framing, restoration, conservation, and art books.
- It is important to note that this does not capture the full range of services which may be offered by an individual business. Information was obtained from desk-based research and site visits rather than directly from the businesses in question.
- **Within use categories, businesses are listed by street address.** Streets are ordered alphabetically and individual businesses are listed in ascending street number order.

Table 2. Database of art uses in St James's (November 2018).

Ref	Address		Name
	Number	Street Name	
Display galleries (Class D1) – total 3			
1	25-26	Masons Yard	White Cube
2	-	The Mall	Mall Galleries
3	-	The Mall	Institute of Contemporary Arts (ICA)
Retail galleries (Class A1) – total 82			
4	3	Bennet Street	Portland Gallery
5	8	Bennet Street	The Skarstedt Gallery
6	3	Bury Street	Priestley and Ferraro
7	4	Bury Street	Daniel Crouch Rare Books
8	6	Bury Street	Duncan R Miller Fine Arts
9	9	Bury Street	The Nine British Art
10	10	Bury Street	Susan Ollemans Oriental Works of Art
11	10	Bury Street	Callisto Fine Arts
12	10	Bury Street	Gibson Antiques
13	10	Bury Street	Jan Van Beers
14	10	Bury Street	Trafalgar Galleries
15	10	Bury Street	Brandt Asian Art
16	11	Bury Street	Mullany
17	13	Bury Street	Julian Simon Fine Art
18	22	Bury Street	The Illustration Cupboard
19	26	Bury Street	Colnaghi
20	34	Bury Street	Martyn Gregory
21	35	Bury Street	Stuart Lochhead Sculpture
22	35	Bury Street	Grosvenor Gallery
23	37	Bury Street	Albert Amor
24	37	Bury Street	Jonathan Tucker Antonia Tozer Asian Art
25	38	Bury Street	Hazlitt Holland-Hibbert

Ref	Address		Name
	Number	Street Name	
26	38	Bury Street	Hazlitt Gooden & Fox
27	40	Bury Street	Malcolm Fairley
28	10	Charles II Street	St James's Ancient Art
29	19	Crown Passage	Rupert Wace Ancient Art
30	3 & 11	Duke Street	Thomas Dane Gallery
31	6	Duke Street	Whitford Fine Art
32	6	Duke Street	Bowman Sculpture
33	8A	Duke Street	Grace Tsumugi Fine Art
34	8	Duke Street	Gallery 8
35	11	Duke Street	Rafael Valls
36	14 & 17	Duke Street	Macconnal-Mason
37	15	Duke Street	Brian Haughton
38	28	Duke Street	Bernard Jacobson Gallery
39	37	Duke Street	Goodman Fine Art
40	38-39	Duke Street	Peter Finer
41	40-41	Duke Street	Willow Gallery
42	43A	Duke Street	Sims Reed Gallery
43	44	Duke Street	Cesare Lampronti
44	57	Jermyn Street	The Sladmore Gallery
45	58	Jermyn Street	Simon C Dickinson
46	59	Jermyn Street	The Weiss Gallery
47	67	Jermyn Street	Tomasso Brothers Fine Art
48	80	Jermyn Street	S. Franses
49	2-4	King Street	David Gill Gallery
50	14	King Street	Pullman Gallery
51	15	King Street	Kenneth Davis Works of Art
52	21	King Street	Simon Ray
53	6	Masons Yard	Zuleika Gallery
54	6	Masons Yard	Harry Moore-Gwyn British Art
55	6	Masons Yard	Stephen Ongpin
56	6	Masons Yard	Guy Peppiatt
57	8	Masons Yard	Jean-Luc Baroni
58	8	Masons Yard	Matthiesen Fine Art
59	13	Masons Yard	Jack Bell Gallery
60	14	Masons Yard	Spademan Rare Books
61	14	Masons Yard	Martin Wyld
62	22	Masons Yard	Alan Wheatley Art
63	24	Masons Yard	JH Bourdon-Smith
64	11-12	Pall Mall	Panter & Hall
65	18-19	Pall Mall	Philip Mould & Company
66	43	Pall Mall	Alan Cristea Gallery Ltd
67	10-11	Park Place	Aktis Gallery

Ref	Address		Name
	Number	Street Name	
68	15	Piccadilly Arcade	St James's Art Books
69	17	Piccadilly Arcade	The Armoury of St James's
70	5	Pickering Place	Nevill Keating Pictures Ltd
71	1	Princes Place	Hunter Harrison
72	2A-6	Ryder Street	Moretti Fine Art
73	5	Ryder Street	Mackinnon Fine Furniture
74	6	Ryder Street	Martin Beisly Fine Art
75	6	Ryder Street	Runjeet Singh
35	6	Ryder Street	Rafael Valls (office)
76	8-10	Ryder Street	Chris Beetles
77	17	Ryder Street	Stoppenbach & Delestre Ltd
78	19	Ryder Street	Fine Art Commissions
79	33	St James's Square	MacDougall Arts Ltd
80	33	St James's Square	Ben Janssens Oriental Art
81	23A	St James's Street	Horne & Harvey
82	36	St James's Street	Edward Speelman
83	60	St James's Street	Wartski
84	66	St James's Street	Stern Pissarro
Dealers (Class A1/B1) – total 10			
85	10	Bury Street	Joost van den Bergh
86	10	Bury Street	Oliver Forge & Brendan Lynch
87	10	Bury Street	Max Rutherford
88	10	Bury Street	Bagshawe Fine Art
89	10	Bury Street	Derek Johns
90	10	Bury Street	Rossi & Rossi Ltd
91	11	Bury Street	N & I Franklin
92	59	Jermyn Street	Galleria Carlo Virgilio & Co
93	58	Jermyn Street	Titus Kendall
94	30	St James's Place	Cohen & Cohen
Auction houses (Sui Generis Class) – total 2			
96	8	King Street	Christie's
97	16-17	Pall Mall	Dreweatts & Bloomsbury Auctions
Associated retailers / services (Class A1/B1) – total 6			
98	8	Bury Street	John Davies Framing
99	31	Bury Street	Arnold Wiggins & Sons
100	42	Duke Street	Thomas Heneage & Co
101	43	Duke Street	Michael Tollemache Fine Art
102	14	Masons Yard	Hamish Dewar
103	41	St James's Place	Rollo Whately Frames

Table 3. 2012 Study database of art galleries in St James's with changes noted

Gallery			Change Since 2012				
Number	Street	Name	No Change	No Longer in St James's	Closed / No Information	Moved Location in St James's	Expanded in St James's
8	Bennet Street	Portland Gallery				✓	
1	Bury Street	Bill Thompson Albany Gallery			✓		
3	Bury Street	Brian Harkins	✓				
6	Bury Street	Duncan R Miller Fine Arts	✓				
7	Bury Street	Tryon Gallery	✓				
9	Bury Street	Paisnel Gallery	✓				
10	Bury Street	Asian Art			✓		
22	Bury Street	The Illustration Cupboard	✓				
27	Bury Street	Panter & Hall				✓	
30	Bury Street	Sims Reed Gallery				✓	
31	Bury Street	Alla Bulyanskaya		✓			
34	Bury Street	Martyn Gregory	✓				
35	Bury Street	Trafalgar Galleries				✓	
37	Bury Street	Albert Amor	✓				
37	Bury Street	Jonathan Tucker Antonia Tozer Asian Art	✓				
38	Bury Street	Hazlitt Holland-Hibbert	✓				
38	Bury Street	Hazlitt Gooden & Fox	✓				
40	Bury Street	Malcolm Fairley	✓				
4	Bury Street	Daniel Crouch Rare Books	✓				
6	Duke Street	Whitford	✓				
6	Duke Street	N R Omell			✓		
8	Duke Street	Asian Art Gallery			✓		
8	Duke Street	Gallery 8	✓				
11	Duke Street	Rafael Valls	✓				
11	Duke Street	Thomas Dane Gallery					✓
12	Duke Street	Derek Johns				✓	
13	Duke Street	J Van Haeften		✓			
13	Duke Street	Obsidian		✓			
14	Duke Street	Macconnal-Mason				✓	
15	Duke Street	Brian Haughton	✓				
34	Duke Street	Robert Bowman Modern				✓	
37	Duke Street	Julian Hartnoll			✓		
41	Duke Street	Duke Street Gallery			✓		
44	Duke Street	Brisigotti			✓		
38-39	Duke Street	Peter Finer	✓				
40-41	Duke Street	Willow Gallery	✓				
8A	Duke Street	Grace Tsumugi Fine Art	✓				
57	Jermyn Street	Sladmore	✓				
58	Jermyn Street	Simon C Dickinson	✓				
59	Jermyn Street	The Weiss Gallery	✓				

Gallery			Change Since 2012				
Number	Street	Name	No Change	No Longer in St James's	Closed / No Information	Moved Location in St James's	Expanded in St James's
80	Jermyn Street	Franses	✓				
75A	Jermyn Street	Trevor Philip & Sons	✓				
8	King Street	Christie's	✓				
14	King Street	Pullman Gallery	✓				
15	King Street	Kenneth Davis Works of Art	✓				
17	King Street	Priestley and Ferraro	✓				
21	King Street	Simon Ray	✓				
2-4	King Street	Frost & Reed		✓			
6	Masons Yard	Stephen Ongpin & Guy Peppiatt	✓				
14	Masons Yard	Hamish Dewar	✓				
22	Masons Yard	Alan Wheatley Art	✓				
7-8	Masons Yard	Jean-Luc Baroni	✓				
7-8	Masons Yard	Matthiesen Fine Art	✓				
25-26	Masons Yard	White Cube	✓				
10	Park Place	Aktis Gallery					✓
5	Piccadilly Arcade	Iconastas	✓				
2-4	Princes Arcade	Celadon Art Gallery			✓		
12A	Princes Arcade	Robert Cox			✓		
5	Ryder Street	Peter Nahum		✓			
17	Ryder Street	Olyvia Oriental			✓		
21	Ryder Street	Grosvenor Gallery				✓	
8-10	Ryder Street	Chris Beetles	✓				
2A-4	Ryder Street	Amells			✓		
2A-4	Ryder Street	Moretti Fine Art					✓
4	St James's Street	The O'Shea Gallery		✓			
66	St James's Street	Stern Pissarro	✓				
23A	St James's Street	Horne & Harvey	✓				
10	St James's Street	Isacc & Ede		✓			
	The Mall	Mall Galleries	✓				
	The Mall	Institute of Contemporary Arts (ICA)	✓				
TOTAL COUNT			41	7	11	8	3

Appendix B. Business Survey Questions

Art in St James's Questionnaire

Thank you for your participation in this short survey. Your responses provide evidence for a Study of Art in St James's, commissioned by the St James's Conservation Trust, to track local art uses and the changes and challenges they face. The aim is to make policy recommendations to maintain and enhance art galleries, auction houses, antiques, art and craft retail, and other related uses, all of which are of critical importance to St James's distinctive character. The information you provide will be aggregated and details of individual businesses kept confidential.

* Required

1. Name of your business *

2. Date established *

3. Address of your premises in St James's *

4. Nature of your business *

Select all that apply. Please type in 'other' box to provide details of any additional services you offer e.g. restoration, valuations, research.

Gallery

Auction house

Retailer

Institution

Other

5. Why St James's? *

Please select all that apply. Please type in 'other' box to give a response not listed.

Prestige / reputation of the area

Proximity to customers

Proximity to suppliers

Proximity to other similar businesses

Accessibility (e.g. to Central London, public transport)

Historical / always located here

Suitability of the premises available here

Other

6. Why St James's?

Please provide any relevant details on your St James's location.

7. Wider art community and links

Please provide details of key business, supplier and customer relationships within and/or outside of St James's, including via the internet.

8. Your business needs - rating *

Please identify operational requirements for your business and/or premises.

	Not needed	Of low importance	Of some importance	Of high importance	Essential
Having a physical presence and premises	<input type="radio"/>				
Security at premises	<input type="radio"/>				
Vehicle access to premises	<input type="radio"/>				
Storage space	<input type="radio"/>				
St James's location	<input type="radio"/>				
Proximity to other similar businesses	<input type="radio"/>				
Proximity to customers	<input type="radio"/>				
Proximity to suppliers	<input type="radio"/>				
Having an online presence and/or online sales	<input type="radio"/>				

9. Your business needs - details

Please elaborate on important aspects identified above.

Enter your answer

10. Your current premises - floorspace and uses *

Please provide a breakdown of the approximate floorspace of your premises in square metres, by use e.g. public art viewing space / retail space / storage space / office space / etc.
If floorspace unknown, please provide rough percentages devoted to each type of use.

Enter your answer

11. Number of employees (full time equivalent) at your premises in St James's *

- 1-5
- 6-10
- 11-20
- 20-49
- 50+

12. Your current premises - length of time in premises *

Enter your answer

13. Your current premises - suitability *

How well does your current premises meet your business needs?

	Not relevant	Very dissatisfied	Dissatisfied	Neutral	Satisfied	Very satisfied
Size of premises	<input type="radio"/>					
Quality of premises	<input type="radio"/>					
Location	<input type="radio"/>					
Cost	<input type="radio"/>					
Overall	<input type="radio"/>					

14. Your current premises - suitability

Please provide details on how well your current premises meets your business needs, and any key concerns or aspects which could be improved.

Enter your answer

15. Your current premises - in St James's *

Are there any issues of concern relating specifically to location in St James's? Please provide details.

Enter your answer

16. Your future - plans *

Please select any applicable and/or type in 'other' box to give response not listed.

- Expand in current premises
- Expand with addition of new premises
- Relocate within St James's
- Relocate outside of St James's
- No major changes planned
- Other

17. Your future - outlook *

Please give your opinion on the following issues.

	Don't know	Pessimistic	Neutral	Optimistic
Future of your business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Future of the art market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Future of art uses in St James's	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18. Your future - outlook *

What are the key issues affecting your business and future outlook?
Please provide details for your above responses.

Enter your answer

19. Would you like to be considered for potential participation in an interview to provide more in-depth views for this study? *

Select your answer

Appendix C. Business Survey Data

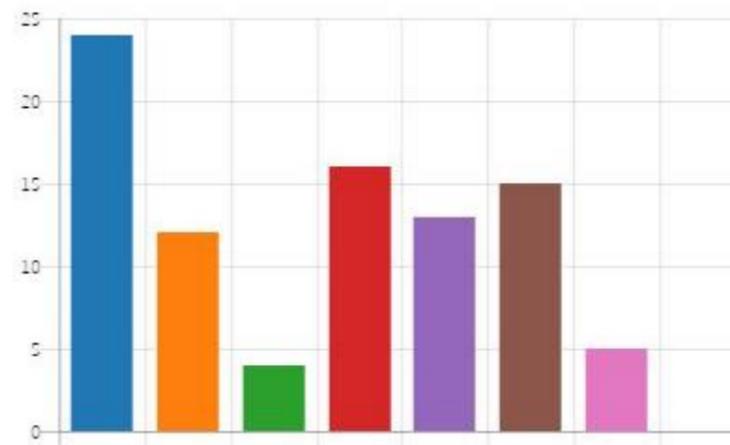
Q4. Nature of your business

● Gallery	20
● Auction house	1
● Retailer	3
● Institution	0
● Other	7

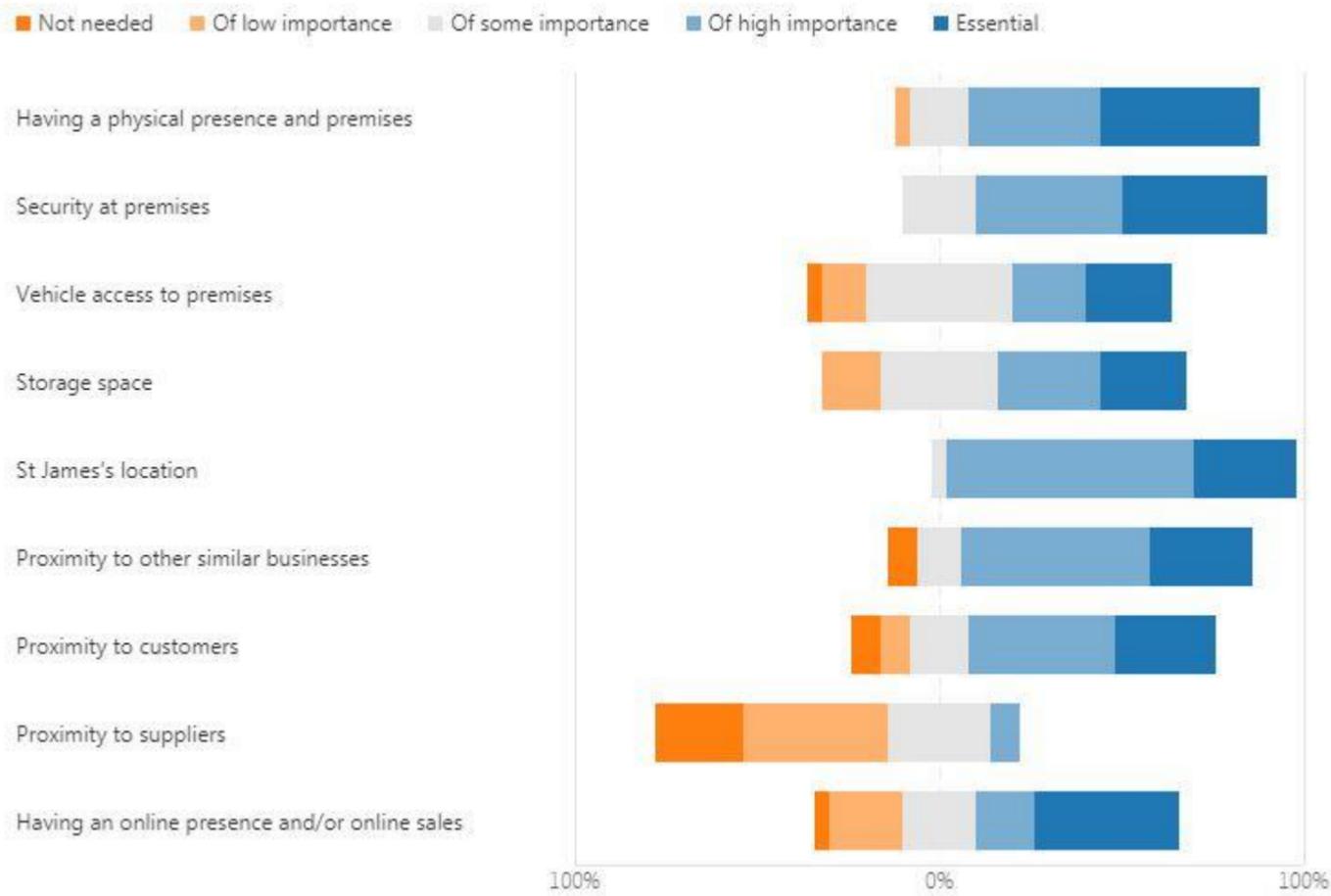


Q5. Why St James's

● Prestige / reputation of the area	24
● Proximity to customers	12
● Proximity to suppliers	4
● Proximity to other similar busi...	16
● Accessibility (e.g. to Central Lo...	13
● Historical / always located here	15
● Suitability of the premises avai...	5
● Other	0



Q8. Your business needs

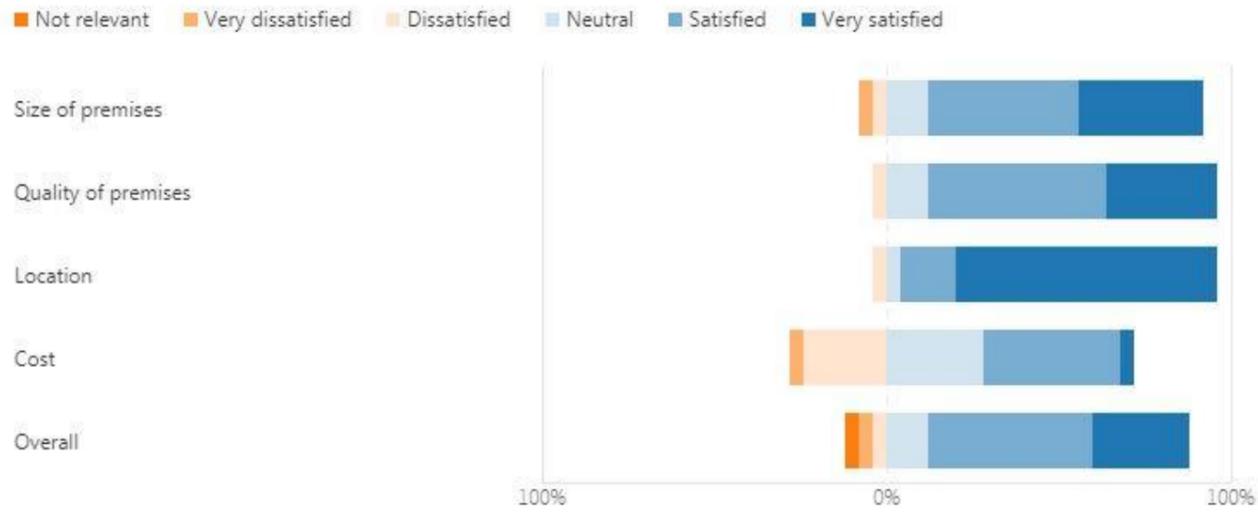


Q11. Number of employees (full time equivalent) at your premises in St James's

1-5	20
6-10	3
11-20	2
20-49	0
50+	0

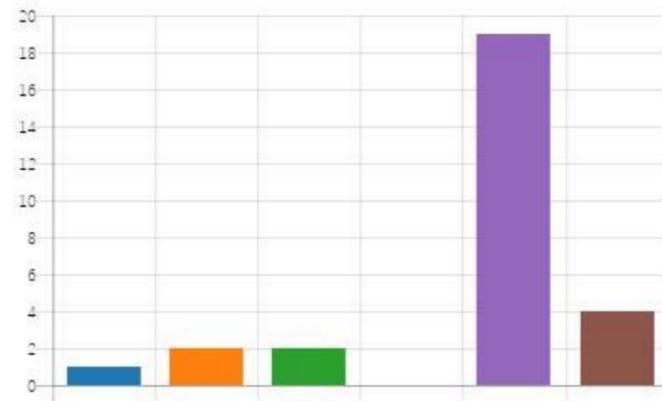


Q13. Your current premises – suitability

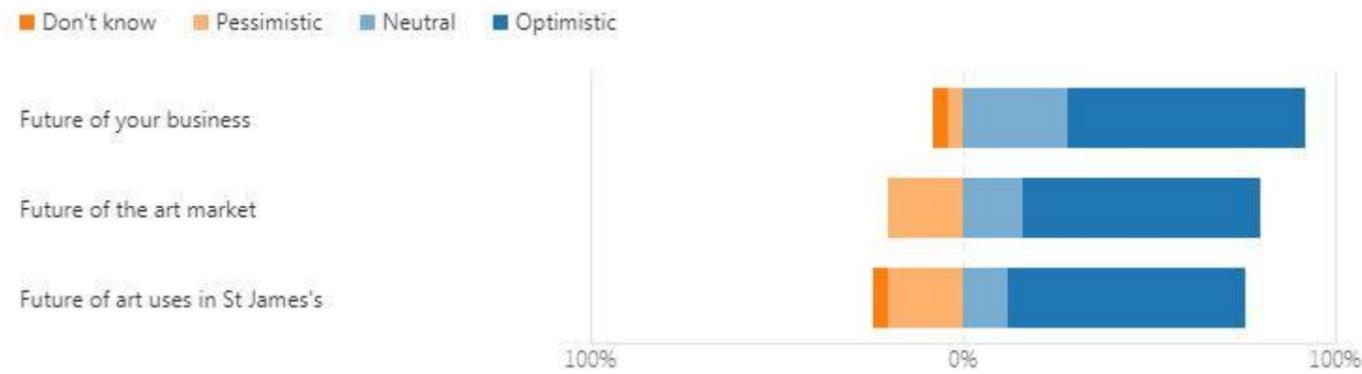


Q16. Your future – plans

- Expand in current premises 1
- Expand with addition of new p... 2
- Relocate within St James's 2
- Relocate outside of St James's 0
- No major changes planned 19
- Other 4



Q17. Your future – outlook



Prepared by Olivia Halper and Peter Heath

Atkins
Nova North
11 Bressenden Place
London
SW1E 5BY

peter.heath@atkinsglobal.com

For more information visit St James's Conservation Trust website: www.stjamestrust.org.uk



© Atkins Ltd except where stated otherwise.

The Atkins logo, 'Carbon Critical Design' and the strapline 'Plan Design Enable' are trademarks of Atkins Ltd.