

ST JAMES'S

LONDON

OUR RETAIL POLICY, ESTATE MANAGEMENT
AND STEWARDSHIP GUIDELINES





Key

- St James's Estate
- Jermyn Street
- Historic St James's
- Piccadilly
- Regent Street St James's
- Haymarket and St James's Market
- A3 proposed for Regent Street St James's

The St James's Estate

This Policy Document applies to The St James's Estate, being all of The Crown Estate's holdings (whether direct or indirect) within the area shown edged red on the attached plan (the "Estate", including any future acquisitions). Further specific policies apply to particular areas of the Estate, as set out further in this document. In the event of any conflict between the general policy for the Estate and the specific policy for a particular area or use, the specific policy shall prevail. For the purposes of this document references to The Crown Estate include any entities set up to hold particular assets in the Estate, in which The Crown Estate continues to hold a material interest.

The Policy sets out The Crown Estate's retail tenant mix policy/strategy and retail estate management guidelines for the Estate, including, (without limitation) matters which The Crown Estate will take into account when considering lettings to prospective tenants, proposed assignments or underlettings by existing tenants and when considering requests to change existing uses.

It is The Crown Estate's intention to work with other land-owners within the area to encourage the adoption of similar principles or policies for their own retail properties in St James's.

General Objectives

A. General Objectives

Prospective occupiers will receive favourable consideration if they support and further the general St James's Estate Management Objectives as follows:

- 1 To enhance the international profile, quality and status of the Estate as a world class shopping and dining destination.
- 2 To attract retailers which embody and further the St James's brand values of being Personal, Distinctive, Stimulating and Eclectic and who at all times focus on the sale of high quality products and services appropriate to the St James's Estate.
- 3 To ensure that retail units on the Estate are at all times occupied by high quality and distinctive brands who, as well as encapsulating the themes and objectives set out in this Policy, will consider St James's as their flagship location.
- 4 To evolve St James's as a place where the contemporary and the traditional blend seamlessly to create a high quality and distinctive retail, dining and lifestyle destination.
- 5 To develop St James's as a destination which attracts distinguished international and UK visitors whilst servicing the particular needs of the residents and employees who live and work in St James's.
- 6 To maintain and preserve at all times the sense of heritage, tradition, elegance and luxury with which St James's is associated.

Key Concepts

B. Key Concepts

- 1 Retailers and uses are unlikely to be acceptable to The Crown Estate unless they encapsulate most, if not all, of the following concepts/themes:
 - a. Distinctive
 - b. Bespoke
 - c. Specialist
 - d. Quality
 - e. Heritage
 - f. Style
 - g. Niche
 - h. Discerning

General Requirements

C. General Requirements

- 1 Retailers with a mass market or traditional high street presence are unlikely to be acceptable to The Crown Estate.
- 2 In addition, retailers should not have any similar product offering within a 0.5 mile radius of the Estate (although distinctive and complementary product offerings within the same brand – for example a menswear store and an accessories store – may be acceptable).
- 3 Multi-brand retailers are unlikely to be acceptable. Retailers must offer a distinctive brand which complements and enhances the wider St James's brand values.
- 4 Retailers whose strategy involves heavy or frequent discounting or aggressive promotion are unlikely to be acceptable. Retailers should be sufficiently confident as to the quality and distinct nature of their offer that discounting or aggressive promotion is neither necessary nor appropriate.
- 5 Retail frontages should be of high quality, in keeping with the St James's brand values, and retail trading areas and shop front window displays should be in keeping with a luxury retail location.

Specific Policies

D. Specific Policies

Jermyn Street

- 1 For these purposes, Jermyn Street refers to the area shaded green on the attached plan.
- 2 Retailers on Jermyn Street should encapsulate the general St James's requirements as set out above. However, and in addition:
 - a. The focus of Jermyn Street is on high end men's clothing, fashion and lifestyle brands and quality bespoke tailoring. This includes ancillary offerings such as men's grooming, men's footwear, men's watches and jewellery and men's lifestyle accessories. Retailers falling outside of these sectors are unlikely to be acceptable. Even where retailers do fall within these categories they are unlikely to be acceptable unless they also meet the other St James's and Jermyn Street requirements set out in this Policy.
 - b. Jermyn Street should at all times embody a sense of masculine elegance, sophistication and luxury and retailers must enhance and complement this.
 - c. Jermyn Street should at all times be a specialist and bespoke destination. Retailers must regard Jermyn Street as their flagship offering and multiple retailers are unlikely to be acceptable.
 - d. Whilst there is undoubtedly place on Jermyn Street for modern, exciting and contemporary brands those brands must reflect and embody the general St James's requirements and the specific Jermyn Street requirements and will complement and enhance the sense of tradition and heritage for which Jermyn Street is internationally renowned.

Historic St James's

- 3 For these purposes, Historic St James's refers to the area shaded pink on the attached plan.
- 4 Retailers in Historic St James's should encapsulate all of the general St James's requirements as set out above. However, and in addition:
 - a. The focus of Historic St James's is on heritage, tradition, culture and timeless quality and any retail offerings in Historic St James's must reflect these values.
 - b. Retailers suitable for Historic St James's will be specialists in their field or "best in class" with bespoke or specialist offerings which distinguish themselves from standard (or even high end) high street retail by reason of their heritage values and distinctive offering.
 - c. Fashion retail is unlikely to be acceptable although retailers of formal wear or business wear who otherwise meet the Historic St James's requirements will be encouraged.

D. Specific Policies

- d. Retailers will build upon or complement the status of Historic St James's as a global leader in the trade of fine art and antiquities. High quality and world renowned arts and antiquities operators who will further enhance St James's reputation will be encouraged in Historic St James's rather than other areas of the Estate.
- e. The reputation of Historic St James's as the home of world renowned clubs and societies is to be preserved and respected.

Piccadilly

- 5 For these purposes, Piccadilly refers to the area shaded blue on the attached plan.
- 6 Retailers on Piccadilly should encapsulate all of the general St James's requirements as set out above. However, and in addition, units with frontages on Piccadilly should be occupied only by high quality lifestyle and fashion brands (including ancillary offerings such as jewellery and footwear) for whom Piccadilly will be a flagship location and whose offering is consistent with and complementary to the standard and class of the key existing brands with which Piccadilly is associated, such as Fortnum & Mason.
- 7 Retailers occupying the arcades off Piccadilly should have an offering which is consistent with the size and historic associations of these locations. Retailers will have high quality niche or specialist offerings which complement the existing and unique character of the relevant arcade. Multi-brand retailers with a "high street" presence or indeed any significant presence outside of St James's are unlikely to be acceptable.

Regent Street St James's

- 8 For these purposes, Regent Street St James's refers to the area shaded orange on the attached plan.
- 9 Retailers on Regent Street St James's should encapsulate all of the general St James's requirements as set out above.
- 10 In addition, the focus of Regent Street St James's is to be upon high end fashionwear, lifestyle and accessories which are consistent with Regent Street's already established reputation of a world class shopping destination.
- 11 Retailers are likely to be destination brands with a reputation for style and quality. The retail offer on Regent Street St James's should however distinguish itself from those parts of Regent Street north of Piccadilly Circus and should instead complement the retail offer of the rest of the Estate.
- 12 It is acknowledged that Regent Street St James's will be subject to a significant period of transformation and regeneration over the next four years and this will be

D. Specific Policies

taken into account when considering short term occupations which will not (including by virtue of any security of tenure) extend beyond 31 December 2015.

Food and Restaurant Uses

- 13 A1 food uses will not (save in the sole and unfettered discretion of The Crown Estate) be acceptable anywhere on the Estate save for on Haymarket and St James's Market (shown shaded yellow on the Plan), where complementary high class delicatessen/coffee shop uses may be acceptable subject always to tenant mix considerations and to the St James's requirements generally. Fast food and/or hot food takeaway as defined in Use Class A5 will not be acceptable.
- 14 No additional food uses are likely to be acceptable on Jermyn Street, Piccadilly or Historic St James's.
- 15 A3 food use on Regent Street St James's Haymarket & St James's Market will only be acceptable within the locations shown edged purple or shaded yellow on the Plan and then only in the case of high quality "best in class" providers. Acceptable providers are likely to be able to offer a contemporary, inclusive day time offering which appeals to the needs of discerning business people and other visitors together with an evening offering which further enhances St James's reputation as a destination for high quality, distinctive dining experiences.
- 16 A3 food uses in Historic St James's are to be limited to destination fine dining establishments who bring with them an established reputation for quality and excellence together with a unique brand and concept.

Pubs and Bars

- 17 A4 pub and bar use will be acceptable only in the case of high quality "best in class" providers, particularly those whose offering is tailored around a high quality food offer. Acceptable providers are likely to be able to offer a contemporary, inclusive day time offering which appeals to the needs of discerning business people together with an evening offering which further enhances St James's reputation as a destination for high quality, distinctive eating and drinking experiences. Any A4 use where the proportion of vertical drinking exceeds 60% of the overall sales mix will not be acceptable.
- 18 Additional nightclubs and late night bars are unlikely to be accepted.

Prohibited Uses

E. Prohibited Uses

The following uses will not be acceptable even if they might otherwise satisfy some or all of the St James's requirements:

- Travel agent/airline office/ticket office/bureaux de change
- Cabaret bar, hostess bar, adult entertainment establishment, sex shop and any establishment requiring a sex establishment licence
- Souvenir shop
- Financial services
- Hot food takeaway
- Mobile phones and technology
- Charity shop
- Job centre
- Casino/amusement arcade
- Pet shop
- Carpets/fabrics
- Convenience food
- Newsagent
- Supermarket
- Betting office
- Car Showroom
- Food court
- Pharmacy
- Dry cleaner
- Printers



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[@stjameslondon](https://twitter.com/stjameslondon)

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Contact Details

The Crown Estate
St James's Team
1 St James's Market
London SW1Y 4AH
+44 (0)20 7851 5000
stjameslondon.co.uk
info@stjameslondon.co.uk