

Bespoke Tailoring in London's West End

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EXECUTIVE SUMMARY

1. Introduction

Bespoke tailoring is the process by which a suit is cut and built for an individual person by a skilled tailor. It has traditionally been a manufacturing enterprise with an element of retailing activity, and thus categorised as a form of light industrial land use. Existing planning laws permit certain changes in land use, and this study has been undertaken in response to development pressures on bespoke tailoring premises, and concern that areas where tailors have traditionally operated are changing in character and function.

The study aims to understand the nature, activities and extent of contemporary bespoke tailoring in the West End – which for two centuries has been the international home of bespoke tailoring – with a view to ascertaining whether further policies and initiatives to protect and promote the sector are needed.

2. Study methodology

The key tool in this study was a survey questionnaire. This was posted to 116 identified tailoring businesses in Westminster. In total, 49 businesses took part in the survey, which represents 42% of all those identified. Furthermore, four study site visits were made to bespoke tailoring premises, on Savile Row and in Soho, to gain an informed understanding the nature of activities and operations of bespoke tailors. The Pollen Estate, the major landowner, in Savile Row and its environs, provided useful comparative rental information.

3. Findings

Business location
There is significant clustering of tailors on and around Savile Row, and in Soho where there are many smaller, self-employed tailors.

Tailoring in the West End is a long-standing activity; 42% of businesses have been at their current premises for 20 years or more. The greatest mobility appears to be among smaller businesses in Soho but there is concern among Savile Row tailors that non-bespoke businesses may displace them in order to gain a presence on this prestigious street.

Employment
The 49 businesses that responded to the survey employ a total of 324 people directly on their premises. Of these 63% are tailors or cutters. A further 77 people are employed directly by businesses at other premises, a third of which are in the West End.

81% of businesses employ fewer than 10 people but the largest businesses are located on Savile Row.

Business linkages and associations
82% of surveyed businesses have some direct economic relationship with another business within the environs of Savile Row and Soho, by either commissioning or providing paid work. The creation of a bespoke suit involves many stages and many skills, and economic linkages are common, as work is technical and specialised.

Respondents emphasised the importance of being clustered, especially when work needs completing in short periods of time, to ensure quality control and to facilitate training. Increasingly, outworking appears to be undertaken further afield, and the economic costs of operating within central London were perceived to be an important factor underlying this trend.

Over a quarter of businesses are members of business associations. The most commonly cited associations included the Merchant Taylors' Company, the Guild of Master Craftsmen, Savile Row Bespoke Ltd and the British Clothing Industry Association.

Size of premises
The floorspace occupied by those businesses surveyed amounted to 7895m^2. Although the average floorspace per business is 188m^2, this varies greatly from one business to another. The smallest businesses are either located in Soho or within larger tailors where 'board space' is hired. The largest tailors are located on and around Savile Row. High rents and rates appeared to restrict the extent of space tailors occupy.

Floor level
75% of all tailoring floorspace is at basement and ground level, enabling the tailors to be visible to customers at street level. Some tailors workshops were also found at upper levels.

Land use
74% of businesses have some workroom space in the West End. The majority of this space is at basement level. Building suits on site remains a key aspect of West End tailoring, as producing and selling suits are intrinsically linked activities.

Most businesses have a retail element (those that do not tend to be purely workshops or by appointment only services). This retail space is mostly at ground floor level, which reflects the importance and benefits of being visible to clients at street level.

Generally speaking, the higher the proportion of turnover derived from bespoke tailoring, the lower the proportion of floorspace devoted to retail activities.

Rental levels
Rents vary according to land use and activity. Workshop space commands lower rents than office or retail activities. Bespoke tailor rents at ground floor level on Savile Row are lower than those achieved by a high class fashion use. Rents are

highest at ground floor, and decrease at upper levels (and where relevant, at basement level too).

Rental growth for retail uses in Savile Row over the last 10 years has been lower than on prime shopping frontages such as Bond Street, Regent Street and Oxford Street, but higher than some comparable specialist trading destinations such as Jermyn Street. Rental growth for 'tailoring' uses appears to have been similar to retail rental growth on Savile Row over the last 10 years.

Accommodation costs are a significant cost for the tailoring industry, but may be less significant than employee costs.

Key themes raised by tailors

Through both the survey questionnaire and case studies, bespoke tailors believe the key issues affecting the industry to be:

<u>Rents and business rates are expensive</u>

The rise in cost of rents and business rates were seen to adversely affect the bespoke tailoring sector. There was a perception that landowners seek to maximise profits by attracting land uses that can afford to pay higher rents, at the expense of bespoke tailors. Respondents felt restricted in the amount of floorspace they occupied, and would like to see more affordable and suitable (e.g. with enough natural light) workspace provided.

The expense of operating in the West End was considered to have 'pushed' employment and production out of central London; several tailors offer a visiting service rather than operating from fixed premises. For this reason, many tailors – particularly the smaller or self-employed ones – felt that bespoke tailoring was a diminishing industry, with an uncertain future.

<u>A lack of young tailors entering the profession</u>

There was felt to be a lack of young people entering the tailoring industry. There was consensus that apprentices were expensive and time consuming to train, and many young people prefer waged, design based work outside the tailoring industry.

<u>The production and selling of garments are intrinsically linked</u>

The combination of these two activities defines bespoke tailoring as being different to mainstream clothes retailing. The two activities are intrinsically linked, for example, in ensuring that suits are produced in as short a time as possible after fittings. Staff need to work in close proximity to one another (to share materials, tools and expertise), and it is important that apprentices are trained on site and on the job.

<u>Tailors and supporting services and industries need to be clustered together</u>

Tailors stressed the need to be clustered to one another, and also to a 'supporting cast' of fabric suppliers, alteration tailors and contractors. There is a need for cutters and fitters to work in close proximity to those involved in completing garments, as work is manually based and transferred, and is sometimes needed very quickly. There is an increasing sense of community among tailors in the West End, and many face similar issues and challenges

Tailoring needs to be protected and promoted as a key cultural, historical and creative part of London
Bespoke tailoring brings wealth to London, is supported by high spending visitors, and contributes to the capital's character and image, especially internationally. Respondents felt that greater protection and promotion of their industry was needed in future.

Non-bespoke retailers are changing the face of Savile Row
Retailers offering only made-to-measure and/or off-the-peg garments were felt to dilute the prestige and essence of Savile Row, which has traditionally offered bespoke garments that are produced on site.

4. Next steps

The city council intends to use the findings of this research to further engage with the landowners, the tailoring industry and agencies such as the London Development Agency and the Central London Partnership to ensure the future of Savile Row as the international home of bespoke tailoring in central London.

Actions to be considered will include:

- The creation of a Savile Row Strategic Group, led by the City Council, to bring together key players in the future of Savile Row. This will include representatives of the landowners and bespoke tailoring companies on and around Savile Row.
- Greater co-ordination and promotion of Savile Row as the destination and home of bespoke tailoring.
- Support for skills and training initiatives.
- Identify the medium term future floorspace needs of the tailoring industry on and around Savile Row and influence landowners to meet those needs.
- Review existing planning policy and guidance as part of the transformation of the city council's Unitary Development Plan (UDP) into the new Local Development Framework (LDF) for Westminster.

1. Introduction

1.1 Bespoke tailoring is the process by which a suit is cut and built for an individual person by a skilled tailor. It differs in many important respects to mainstream garment production, most notably because clothes are made to individual measurement and figuration details, and also because they are hand-made. Put simply, a bespoke suit only comes into existence once a client has visited a tailor, rather than being 'ready to wear' beforehand.

1.2 Westminster City Council is committed to safeguarding and promoting Savile Row as the national and international centre of bespoke tailoring. The area has a unique character and history, attracts and retains wealth for London, has an iconic status globally and the Savile Row name itself is a byword for quality craftsmanship and for a male suit generally.

Savile Row: internationally synonymous with high quality tailoring

1.3 Savile Row is more than just a single street and refers to a small area where bespoke tailors have existed for over two centuries. The area was developed in the eighteenth century when it was part of Burlington Estate, and this is still evident in the names of streets and buildings; the Third Earl of Burlington named 'Savile Street' after his wife's family. Today, much of Savile Row is part of the Pollen Estate, which dates back to 1812[1]. The buildings in the area were never intended to be shops, but rather private dwellings. After a while, physicians moved in, and over time, they migrated to Harley Street after tailors started to arrive.

[1] The Pollen Estate was originally the property of Reverend George Pollen. The Trust has over a hundred beneficiaries, the largest two of which are now the Church Commissioners (65% interest) and Greenwich Hospital, a charitable organisation related to the Ministry of Defence (10% interest).

1.4 By the second half of the nineteenth century, Savile Row had been turned into "a worldwide synonym for the very best in gentlemen's bespoke tailoring"[2]. London took over from Paris the accolade of being the centre of tailoring, due partly to the quality of England's wool and weaving industry. Over time, tailors in the area have produced garments for royalty, politicians, business leaders and celebrities; Henry Poole & Co., for example, count Sir Winston Churchill, General Charles de Gaulle and Charles Dickens as some of their most famous clients. Even in Japan, a suit is still known as a 'Sabiro', and tailors have long insisted that Savile Row suits should be made on and around Savile Row, in the same way that the wine makers of Champagne have defended their right to the sole use of the word 'champagne'[3].

1.5 Tailors have congregated on and around Savile Row and have traditionally undertaken fitting, cutting and building of garments on site. This is a key characteristic of bespoke tailoring and one that makes it different to conventional retailing. For this reason, bespoke tailoring has traditionally been regarded as a form of light industry. Until 1987 the planning system enabled the protection of light industrial uses and prevented them being displaced by other land uses, such as offices, that could command higher land values.

1.6 However, since the late 1980s changes to planning laws removed this explicit protection and helped lead to increases in the rents paid by bespoke tailoring businesses. The current planning system gives significant scope for bespoke tailoring to be displaced by other forms of land use, particularly office use.

1.7 It is interesting to note that in recent years a number of high-class fashion retailers have located on Savile Row, to obtain a prestigious business address, but have not been long-term occupiers. Examples include: Hackett, Duffer of St. George, and more recently, Jil Sander.

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[2] Howarth, S.: *'Henry Poole: Founders of Savile Row: The Making of a Legend'*. Bene Factum Publishing Ltd.: Honiton (2003): page 3.
[3] op. cit. , page 5.

2. Study aims

2.1 This study has been undertaken in response to development pressures on bespoke tailoring premises. There is concern both amongst those in the industry and within the city council, that the current planning system does not provide sufficient protection for bespoke tailors, and that premises and areas where such activities have traditionally operated are changing in character and function.

2.2 In order to ascertain whether further policies and initiatives to protect and promote bespoke tailoring in the West End are needed, this study aims to assess:

- How many bespoke tailoring businesses there are in Westminster and where they are located;
- How many people are employed in bespoke tailoring;
- The kinds of activities and business linkages that exist in bespoke tailoring;
- The floor locations and floorspace size occupied by tailors;
- The balance between manufacturing and retailing elements;
- What rents are paid by bespoke tailoring businesses on and around Savile Row in comparison to other activities and other areas in the West End;
- What tailors believe to be the key issues facing the sector.

2.3 The undertaking and findings of the research are presented in sections 4-7, after a discussion of the current national, local and regional planning context.

3. Planning policy context

3.1 Bespoke tailoring forms a primarily creative manufacturing enterprise with a variable element of retailing. For this reason, bespoke tailoring has been regarded as a form of light industry, within class B1(c) of the Town and Country Planning (Use Classes) Order (UCO)[4]. The current Use Classes Order 2005, which underpins the UK's planning system, permits and restricts changes in land use[5]. In the current context, planning permission is *not* required – unless specifically protected through a planning condition or legal agreement – if light industrial uses such as bespoke tailoring are to be transformed into:

- Offices, not within A2[6] (use class B1(a));
- Research and development, studios, laboratories, high tech (use class B1(b));
- Wholesale warehouse, distribution centres, repositories (where no larger than 235m^2) (use class B8).

3.2 Therefore, the current national planning system gives significant scope to allow light industry and bespoke tailoring to be displaced by other forms of land use, particularly office use.

3.3 Recent trends in the types of bespoke tailoring business models have led to, in certain businesses, a greater proportion of the businesses, both in terms of floorspace occupied and turnover, being devoted to retail activity of goods made *off* the premises. In such cases it is likely, depending on the definition of the planning unit, that such premises would, under the terms of the UCO, form a 'sui generis' or mixed-use class. In such cases the local planning authority would be able to control the change of use of such premises to any other land use – such as retail (class A1) or offices (class B1).

3.4 Were premises to be dominated by the selling of goods not made on the premises, or with little manufacture of goods sold on the premises, these would generally be regarded as purely retail premises within class A1 of the UCO. These do not form a bespoke tailoring activity in planning terms.

3.5 Despite this, Westminster City Council has had long-standing planning policies to protect and enhance light industrial uses in Westminster and these have been re-stated in the latest development plan, the Replacement Unitary Development Plan (RUDP as agreed by Full Council 13th December 2004). The Plan seeks to shape the development of the City and recognises the importance of a broad and diverse economic and employment base. Creative industries such as bespoke tailoring are part

[4] The 1987 Use Classes Order defines 'light industrial use' (B1(c)) as "any industrial process being a use which can be carried out in any residential area without detriment to the amenity of that area by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit".
[5] See also the General Permitted Development Order (GDPO) 1995
[6] A2 Class includes financial and professional services such as: banks, building societies, estate and employment agencies, professional and financial services, betting offices.

of this: they offer specialist goods and services to national and international markets, and contribute to London's World City status. Bespoke tailors are dependent upon their location in central London to operate successfully for it is here that customers with the high spending power needed to purchase bespoke products work, live and visit. RUDP policy CENT 1(a) states that "planning permission will not be granted for development that results in the loss of Central London Activities within the Central Activities Zone where these activities contribute to its character and function". Paragraph 1.20 of the Plan recognises that specialist traditional uses in the Mayfair area include tailors on and around Savile Row.

3.6 As well as being defined as a Central London Activity, bespoke tailoring is normally regarded as a creative industry and a light industrial use. Policies COM 8 and 9 of the Westminster RUDP provide further protection and promotion within the limitations imposed by current planning legislation. Policy COM 8 in particular states that proposals for the redevelopment, rehabilitation or for other development affecting premises containing light industrial floorspace will not be granted planning permission where 1) the site is located within the Creative Industries Special Policy Area (see Map 1); and 2) this would result in the loss of industrial activities which contribute to the character and function of the area.

3.7 Westminster's policies are consistent with those of the London Mayor, who also seeks to promote creative industries through the London Plan, the spatial development strategy for Greater London[7]. Policy 5B.3 of the London Plan requires clusters of specialist activity in and around central London to be defined in UDPs and for their activities to be protected and supported. Policy 3B.9 (p.96) states that the Mayor "will seek competitive development capacity to retain them [creative industries] in London, where they benefit from a world city environment." Westminster's policies are in line with the Mayor's policies to "identify and support the development of clusters of creative industries and related activities and environments".

3.8 An estimated 6,000-7,000 suits are produced annually on and around Savile Row. This represents £21 million turnover per annum[8]. On top of the economic contribution made by bespoke tailors to central London, their premises contribute to the capital's physical character and appeal as a place to live, work and visit.

3.9 Savile Row, for example, is within the Mayfair and Regent Street Conservation Areas designated by the city council (see map 2), and any planning application relating to new buildings or alterations to existing ones must preserve or enhance the character or appearance of the area, as specified by the relevant sections of policy DES 9. Importantly, this same policy notes that uses, activities and shopfronts, as much as buildings themselves, contribute to character and function (paragraph 10.116-20). Bespoke tailoring is pertinent in this respect, through a historical and

[7] Mayor of London: *'The London Plan: Spatial Development Strategy for Greater London'* (February 2004).
[8] Estimate of overall production by Mark Henderson, Chief Executive of Gieves & Hawkes, 1 Savile Row.

functional relationship to the surrounding area. A number of bespoke tailors also occupy listed buildings within the Conservation Areas, of the type shown in the figure below.

Savile Row: bespoke tailoring uses, activities and shopfronts contribute to the area's character and function

4. Research methodology

Questionnaire

Questionnaire design

4.1 The key tool in this study was a survey that aimed to understand the nature, activities and extent of contemporary bespoke tailoring in the West End. Individual questions within the survey focused more specifically on:

- Business location;
- Employment;
- Types of activities undertaken and services provided;
- Floor location and floorspace size;
- Business linkages and associations.

4.2 A more open-ended question asking respondents for additional information or comment was also included. This forms the basis of a discussion on key themes later on in this document (section 5.8). A copy of the questionnaire is included in appendix 1.

Identification of bespoke tailoring businesses

4.3 Having devised a questionnaire, the next step was to identify relevant businesses that would be surveyed as part of the study. As a starting point, an existing directory of tailors was obtained from a Skillfast-UK report[9]. In addition to this, different internet search engines and online business directories were searched for a range of keywords.

4.4 By its own nature, bespoke tailoring neither serves a mass market, nor traditionally markets itself conspicuously, particularly in the case of self-employed tailors and lone practitioners. Businesses attract and retain clients as much through word-of-mouth and reputation as through advertising, and this presented difficulties when trying to compile a database. Informal site visits were made along Savile Row and parts of Soho to identify and record any additional businesses. This means that although there is likely to be an element of undercounting in this study, this should be relatively limited.

4.5. As the study focuses specifically on bespoke tailoring, an attempt was made where possible to determine what kind of services businesses offered. Where it was clear that a business offered only off-the-peg, made-to-measure, or alteration services – as opposed to purely bespoke – they were excluded from the database. Bespoke tailoring differs from other forms of suit making in terms of production process: garments are individually measured, prepared and finished, and thus bespoke tailors are craftsmen as well as retailers. Where there was doubt as to the activities of a broadly 'tailoring' company, they were included on the database and sent the questionnaire. Through this, it would then be possible to determine their status and activities.

[9] Skillfast-UK: *'The Art of Bespoke Tailoring: Identifying future training needs'* (August 2004).

4.6 Overall, a total of 116 tailoring businesses were identified in the City of Westminster. Although a number of bespoke tailors can be found in other central London boroughs most notably the City of London and Camden, the vast majority are located in Westminster.

Response rate

4.7 The questionnaire was sent out to 116 businesses by post at the end of June 2005. Respondents were asked to reply within three weeks by post. A covering letter was attached which explained why the study was being undertaken, and emphasised the city council's commitment to safeguarding and promoting tailoring services and industries in the West End (appendix 1).

4.8 In order to collate as much information as possible, all non-respondents were contacted by telephone towards the end of July and in August. Around 33 businesses took part in telephone interviews, which when combined with post and email replies, amounted to a total of 56 responses. This was an encouraging response rate, representing 48% of all 116 businesses surveyed.

4.9. It transpired that three businesses no longer existed or had retired, and a further four had been incorporated into other tailors (see section 5.3.7). Taking this into account, there remained a total of 49 'valid' or 'active' questionnaire responses; unless otherwise specified the survey results are based on these 49 responses. The businesses that responded to the survey are listed in appendix 2.

<u>Case studies</u>

4.10 Further to the questionnaire survey, a number of case study site visits were made to bespoke tailoring premises. It was important to visit businesses in person to develop a better understanding of how suits are produced and sold, how floorspace is used, and also to talk in more depth with tailors about their business operations, issues and needs.

4.11 Whilst undertaking the questionnaires and telephone interviews, several businesses stated that they were happy to help the city council further in its study. A number of businesses were subsequently contacted in September to follow up this invitation, and to set up site visits. Four businesses were selected because of the varied number of people they employ, the range of products they offer, and their reputation and image. These were:

- Henry Poole & Co., 15 Savile Row;
- Hardy Amies, 14 Savile Row;
- Franco Santoro, 26 Kingly Street;
- Gieves & Hawkes, 1 Savile Row.

4.12 The case studies illustrate the diversity of business types and models in the tailoring industry, a point that is discussed in more detail later.

4.13 The visits were undertaken at the start of September and officers from the city council were given a full tour of each of the premises (including where relevant, workrooms and offices), and the opportunity to see employees at work in the different stages of garment production. The experience was enlightening, and photos and notes of observations and details of conversations all form the basis for chapter 6 'Case studies'.

5. Survey findings

Business location

5.1 Map 3 shows the 49 tailoring businesses that participated in the survey. They are all located in the West End, especially on Savile Row (19 businesses in total), Berwick Street (5), Kingly Street (3) and New Burlington Street (3) (see also appendix 2).

5.2 Whilst this study does not chronicle whether the number of tailoring businesses has increased or decreased over time, it is nevertheless clear that there is still substantial clustering in the West End. On the west side of Regent Street around Savile Row are some of the larger and most prestigious tailoring companies, whilst Soho to the east is characterised by smaller, self-employed tailors.

5.3 As well as seeking to determine where businesses are located, the questionnaire also asked how long they have occupied their existing premises. Among those businesses that were able to respond, the breakdown of results are as follows:

Table 1: Length of time businesses have occupied premises

Time	Number of responses	Percentage
Less than 5 years (2001 – 2005)	11	23%
5 to 10 years (1996 – 2000)	9	19%
10 to 20 years (1986 – 1995)	7	15%
20 to 30 years (1976 – 1985)	9	19%
30 to 40 years (1966 – 1975)	3	6%
40 to 50 years (1956 – 1965)	2	4%
Over 50 years (before 1955)	6	13%

5.4 Tailoring in the West End and Savile Row is a long-standing activity, and many businesses have been established for decades (and in some cases, centuries). This is reflected by the fact that 42% of businesses have been at their current premises for 20 years or more, and 58% for 10 years or more. However, even some of the oldest tailors have had to relocate in their past: Henry Poole was established in 1806 and whilst the business has spent the majority of its time on Savile Row, it briefly moved to nearby Cork Street. More recently, Anderson & Sheppard have moved to new premises on Old Burlington Street.

5.5 The greatest mobility appears to be among smaller businesses in Soho. Telephone conversations revealed that many tailors have had to relocate many times, in particular from Carnaby Street to Kingly Street. The main contributing factor was the replacement of tailoring uses at the end of lease periods by higher value uses such as office and retail. There is concern among businesses that this may occur on Savile Row too, given that it is a highly desirable business address, especially for high-class (but non-bespoke) fashion outlets.

Employment

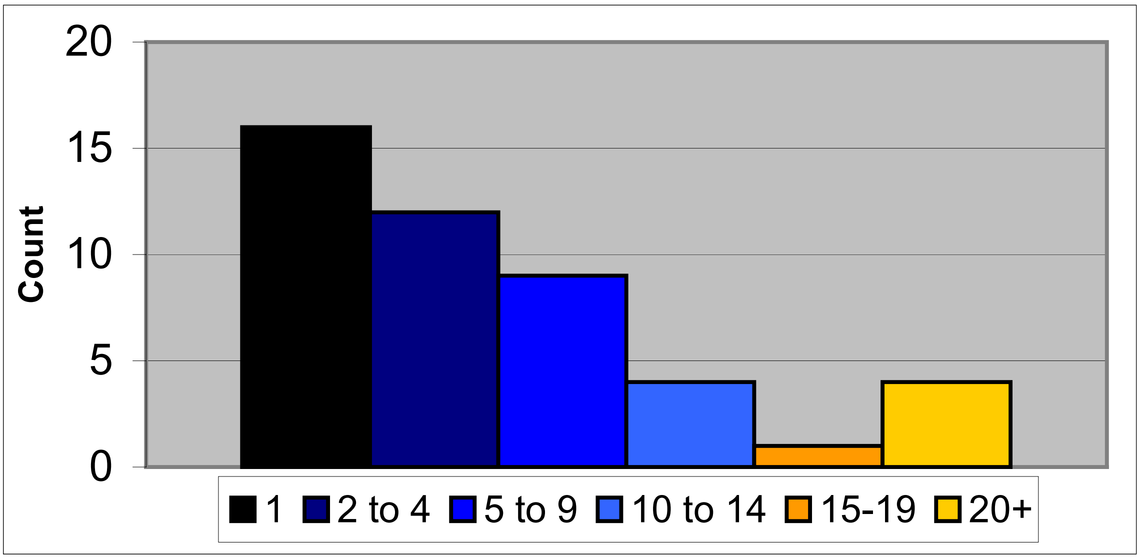
5.6 The 49 businesses that responded to the survey employ a total of 324 people directly on their premises. Of these, 63% (i.e. 203 people) are tailors or cutters, the remainder split between sales, office and administrative staff. Tailors represent an important and sizeable community of highly skilled craftsmen working in the heart of London.

5.7 There is considerable variation in the size of businesses: many are self-employed, others small workshops and businesses of under five people, whilst four businesses employ over twenty people at their premises. A breakdown by size categories is given in table 2 and graph 1 below:

Table 2: Number of employees working at business premises

Number of employees working at business premises	Count	Percentage
1	16	35%
2-4	12	26%
5-9	9	20%
10-14	4	9%
15-19	1	2%
20+	4	9%

Graph 1: Number of employees working at business premises



5.8 Overall 81% of businesses employ fewer than 10 people and this is consistent with figures for the City of Westminster generally (84%

according to the City of Westminster Economic Development Strategy[10]). Tailoring is a creative industry, and these tend to employ a small but highly skilled workforce.

5.9 Nine of the above businesses employ a further 77 staff at other premises, some 22 of which were confirmed to be in the West End. When combined with 324 people working at the main business premises, around 400 staff are employed directly by the businesses surveyed[11]. Further discussions suggested that businesses employ people at other premises because workspace in the West End is expensive and limited.

Business linkages and associations

5.10 Another tenet of the research project was to examine networks and linkages between different businesses. 82% of surveyed businesses have some direct economic relationship with another business within the environs of Savile Row and Soho, by either commissioning or providing paid work.

5.11 Inevitably, the extent to which businesses are linked varies. Typical relationships include bespoke tailors contracting out the process of jacket and trouser making once the measuring and cutting processes has been undertaken, and also outsourcing alteration work to alteration tailors. Many smaller self-employed tailors depend on bigger firms to provide them with work. The creation of a bespoke suit involves many stages and many skills, and economic linkages are common, as work is technical and specialised.

5.12 These linked businesses tend to be located in the West End too. Respondents emphasised the importance of being clustered, especially when work needs completing in short periods of time and to ensure quality control. However, not all linked businesses are located in the West End, and some are located elsewhere in Greater London. The main factor why such businesses are located outside the West End, according to telephone discussions, is limited floorspace availability and high accommodation costs.

5.13 Around 18% of responding companies have no direct external linkages; they are stand-alone businesses producing all work in-house. Respondents in this category tend to be one of two types: either large Savile Row companies that employ a wide range of staff trained to complete all stages of garment production; or on the other hand, very small (usually self-employed or family based but with low output) businesses that undertake the production from start to finish.

[10] City of Westminster: *'Economic Development Strategy'* (March 2005).

[11] This figure should be approached with some caution, as it appears that some respondents may have confused the number of people they employ at other premises with the number of people they contract work out to.

5.14 Although this study concentrated specifically on bespoke tailors, it became clear through telephone conversations that there is a wider constellation of linked businesses. For example, several firms use fabrics from Scabal or Holland & Sherry on Savile Row, whilst many alteration tailors depend on Savile Row for the outsourcing of work. In another example, one business stressed the importance of being able to obtain buttons and threads at short notice from suppliers based within walking distance, rather than have to wait for deliveries from national suppliers.

5.15 There are two main implications from the examples above. Firstly, bespoke tailoring has greater importance in terms of employment, economic linkages and so forth by virtue of longer supply chains. Secondly, this emphasises the importance of clustering businesses close to one another.

5.16 The study came across several cases where bespoke tailoring businesses have been incorporated into others. Many continue to run under a separate company name to the larger 'host' businesses whose address they share. In returning the questionnaire, it was unclear as to whether 'host' businesses responded for themselves only or for any incorporated company too. Therefore, this study only refers to 'host' businesses in terms of employment figures, size of premises, etc. This slight undercounting means that the overall size of bespoke tailoring is in fact more significant, as are the levels of business linkages between different companies that operate from the same address.

5.17 The survey ascertained whether bespoke tailors were part of any formal business association, such as a guild or craft association. Over a quarter (29%) of responding businesses stated that they are, these mainly being the larger, longer established tailors. The most commonly cited associations included the Merchant Taylors' Company, Master Craftsmen Association, as well as Savile Row Bespoke Ltd and the British Clothing Industry Association (see Appendix 3).

Size of premises

5.18 Although 49 businesses took part in the survey, only 42 were able to provide details on floorspace size. Therefore, overall floorspace currently in tailoring use is higher than that set out below.

5.19 Floorspace occupied by all those businesses that responded amounts to 7895m^2. Although the average floorspace per business is 188m^2, there are large variations from one business to another. Some self-employed tailors have personal workspaces of only 6m^2, in rooms shared with other people. In particular, these tend to be small tailors based in Soho, or individual tailors renting 'board space' at a larger Savile Row company.

Contrasting amounts of workroom space between Hardy Amies and Franco Santoro tailors

5.20 However, there are some large businesses, the biggest of which occupies 1415m^2. Savile Row is home to not only the most prestigious and longest established tailoring companies, but also the largest. The variety in floorspace clearly relates to the business size, types of activities and the number of employees. A key theme for most respondents was that the high level of rents and rates restricted the amount of floorspace occupied.

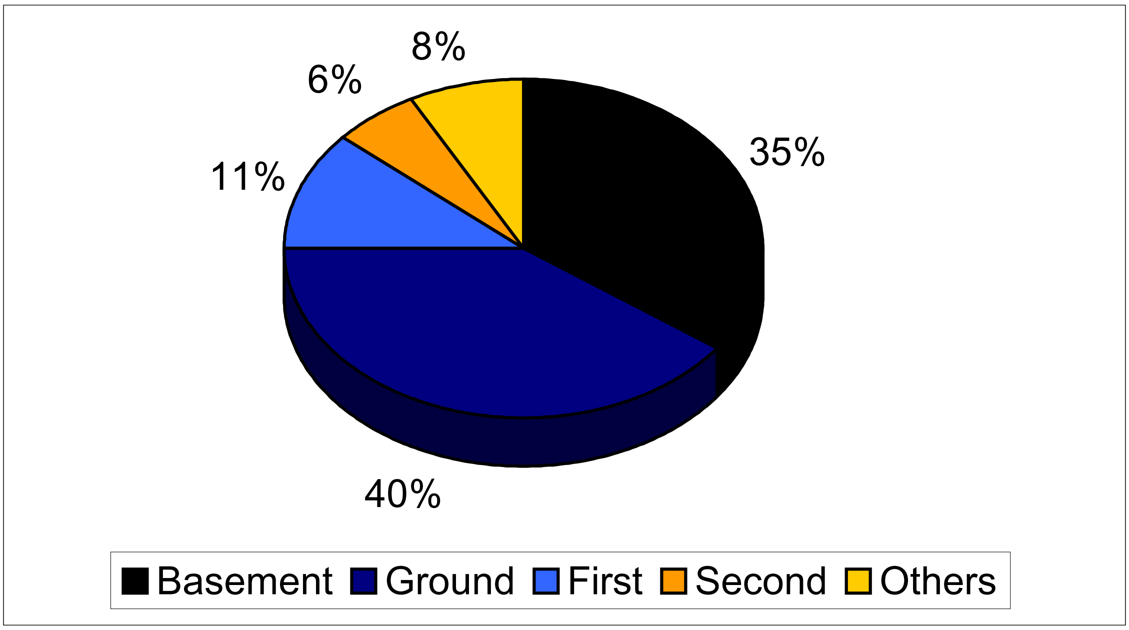
Floor level

5.21 The questionnaire was also designed to find out where tailors were located within buildings in terms of their floor location, together with the floorspace they occupied. The results are included in table 3 and graph 2 below, and represented through maps 4-6. The two main floors on which tailors are located are basement and ground, where there are 22 and 27 businesses respectively. 19 businesses are present at both the ground *and* basement floors. As much as 75% of all tailoring floorspace is at basement and ground level, enabling the tailors to be visible to customers at street level. Those businesses without a ground floor presence generally tended to be smaller, often self-employed ones, especially those located in Soho (see maps 4-6).

Table 3: Total floorspace size and number of businesses by floor

Floor level	**Basement**	**Ground**	**First**	**Second**	**Others**	**TOTAL**
Floorspace	2771 m^2	3159m^2	901m^2	441m^2	623m^2	7895m^2
Floorspace as a % of total floorspace	35%	40%	11%	6%	8%	100%
Number of businesses	22	27	13	8	8	

Graph 2: Proportion of total tailoring floorspace at different floor levels



Land use

5.22 Bespoke tailoring differs from ready-to-wear ranges in that bespoke suits are both produced and sold by tailors, normally on the same site. The study aimed to ascertain how much floorspace was devoted by businesses to the process of making suits compared to the selling and display of goods.

Workrooms

5.23 Of the 42 businesses that were able to provide floorspace figures, 74% had some element of workroom space in the West End. As much as 37% (2899m^2) of all bespoke tailoring floorspace (7895m^2) is in workroom use.

5.24 This basic data illustrates that the actual manufacture of suits on site is still a key tenet of West End tailoring. Respondents emphasised that linking production to retailing is an important and essential tradition. Because the production of a bespoke suit involves measuring, cutting, building, fitting and finishing garments, staff involved at each stage need to work in close physical proximity and co-operation. Having workrooms on the premises allows bespoke tailors to start working immediately on a suit once a customer has been fitted. Furthermore, the presence of skilled tailors on site assures clients that quality is high. Some respondents were unable to distinguish between workshop use and other uses – illustrating the intrinsic link between production and retailing.

Workrooms on Savile Row. Employees specialise in different stages of suit production (in this example, cutting) and work in close proximity

5.25 Although there were a number of cases where production work is done elsewhere – especially from tailors that only use Savile Row for retail, showroom and fitting purposes – the main reason was again perceived to be the expensive costs and overheads of workroom space in the West End.

5.26 Lastly, table 4 gives a breakdown of where workroom space is located, on a floor by floor basis. It shows that that the majority of workroom space is at basement level (1695m^2 out of 2899m^2). This is explained in large part by the priority that is given to the ground floor for the display, sale, measuring and fitting of suits, with production located at levels that command lower rents.

Table 4: Workrooms: sum of floorspace and number of business by floor level

Floor level	**Basement**	**Ground**	**First**	**Second**	**Others**	**TOTAL**
Floorspace	1695m^2	435m^2	185m^2	147m^2	437m^2	2899m^2
Number of businesses	13	12	6	5	6	

Retailing

5.27 Eighty percent of surveyed businesses have some form of retail element. Those that do not have retail space tend to be purely workshops or by appointment only services. Of all the floorspace occupied by tailors (7895m^2) some 41% (3268m^2) is devoted to retail activity. 72% of this

(2346m²) is devoted to the retailing of bespoke tailored goods and 28% (922m²) to the selling of non-bespoke goods[12].

5.28 Retail space is located mostly at ground floor (2575m²), which reflects the importance and benefits of being visible to clients at street level, for example, through window displays. There is also evidence to suggest that the higher the proportion of turnover derived from bespoke tailoring, the lower the proportion of floorspace is devoted to retail activities. In contrast to ready-to-wear and made-to-measure garments that are sold but not generally produced/altered on site, bespoke tailoring requires space for employees to work in, and for fabrics and equipment to be held.

Retail area at ground floor of Hardy Amies

Table 5: Retail – total of retail (tailoring) and retail (other): sum of floorspace by floor level

Floor level	**Basement**	**Ground**	**First**	**Second**	**Others**	**TOTAL**
Floorspace	281m²	2575m²	404m²	0m²	8m²	3268m²
Number of businesses	4	26	4	0	1	

Storage and office use

5.29 The questionnaire also asked what proportion of floorspace was devoted to storage and office uses. 15 businesses have storage space, equating to a total of 493m². Office space is more important: 18 businesses have a sum of 1258m² of office space. As indicated by tables 6 and 7, storage space is predominantly at basement level and office space is predominantly at upper floor levels.

[12] A number of respondents were not able to differentiate between the retail space devoted to the selling of tailored goods and other goods.

5.30 Storage and administration are important to bespoke tailoring, alongside manufacture and retailing activities.

Henry Poole & Co.: archives of figuration and measurement details of clients from the past two hundred years

Table 6: Storage: sum of floorspace and number of businesses by floor level

Floor level	**Basement**	**Ground**	**First**	**Second**	**Others**	**TOTAL**
Floorspace	419	74	0	0	0	493m^2
Number of businesses	12	5	0	0	0	

Table 7: Offices: sum of floorspace and number of businesses by floor level

Floor level	**Basement**	**Ground**	**First**	**Second**	**Others**	**TOTAL**
Floorspace	422	75	266	294	201	1258m^2
Number of businesses	10	5	5	3	3	

Turnover

5.31 Again, there was significant variation in the responses. Some only had a small element of bespoke tailoring, combining it with sales of made-to-measure or off-the-peg suits. Others – especially on Savile Row – derived most of their turnover from bespoke products. Most tailors provide accessories to complement suits – such as shirts, cufflinks and ties – but the majority of their income is generated by bespoke tailoring.

Key themes raised by tailors

5.32 In addition to the structured questions posed in the survey, respondents were asked to express what they believed to be the key issues and challenges facing bespoke tailoring. This next section summarises some of these subjective opinions into a series of key themes.

Theme 1: Rents and business rates are expensive

5.33 Perhaps the most commonly cited issue among respondents was about the cost of rates and rents. There was a perception that landowners seek to maximise profit by attracting activities that can afford to pay higher rents, at the expense of bespoke tailors. For example, many small tailors that used to operate in Carnaby Street have since had to move to different premises at the end of their lease. The smaller tailors that contributed to Carnaby Street's iconic global status have been replaced by larger, chain retailers.

> *"When leases run out, tailors are being forced out."*
>
> Visiting tailor using Savile Row premises for fittings

5.34 Respondents felt that rates and rents had risen considerably in recent years. This has hit businesses hard, especially self-employed tailors and small businesses, who felt their businesses would no longer be viable.

5.35 Rents and rates were perceived to be the reasons why some bespoke tailors do not have a fixed West End address. There are several businesses that only offer a visiting service to clients, while some businesses use Savile Row premises on a non-permanent basis for fitting purposes only. Though most would like to be in the West End, expenses prove prohibitive, and there is a sense that customers cannot be expected to shoulder all the burden through inflated prices.

5.36 Tailors emphasised the need for affordable and reasonable rates and rent in recognition of the nature of the work they undertake and of the cultural and historical significance of London as a centre for bespoke tailoring.

> *"Rates have tripled of late, and there are not enough customers to keep up with mounting expenses. Demand is still quite strong from customers, even though suits are becoming more expensive to cover some of these costs."*
>
> Small sized bespoke business, Avery Row, Mayfair[13]

> *"Tailors all want to be in Savile Row, but rent is prohibitive."*
>
> Sole trader, New Burlington Street, Mayfair

[13] For confidentiality and data protection purposes, the names of respondents/responding businesses cannot be disclosed. However, for the purposes of this document businesses are categorised as follows: 1) Sole trader; 2) Small bespoke business (2-4 employees); 3) Medium bespoke business (5-14 employees); Large bespoke business (15+ employees).

Theme 2: A changing industry

5.37 The majority of tailors – and especially the smaller or self-employed ones – felt that bespoke tailoring was a diminishing industry, with an uncertain future. The costs of running a business meant few made significant profits. Other factors were influential too, such as a lack of young people entering the industry and this and a number of other themes are discussed below. That said, there were a few examples of new tailors opening up (e.g. Addison & Steele, Spencer Hart), who have said they have enjoyed success in the bespoke market.

> *"During the past few years the number of bespoke tailors shops in Hanover Square, Hanover Street, Maddox Street and St George Street have dwindled to virtually nil."*
>
> Medium sized bespoke business, St George Street, Mayfair

Theme 3: A lack of young tailors entering the profession

5.38 Another key issue contributing to the view expressed concerning a 'sense of decline' in tailoring was a lack of young people entering the sector. This is well documented in a separate study by Skillfast-UK[14], which states:

> *"There is a feeling amongst these companies that the craft of bespoke tailoring is not attracting enough young people, that it is under-supported in relation to the high standards expected from this sector of industry, and that a downgrading of vocational, technical and craft skills in favour of an excessive emphasis on design is having a serious detrimental effect"*.

5.39 There was consensus that apprentices were expensive and time consuming to train, and most young people prefer waged, design based work elsewhere. Tailors sympathised to some extent with the choices of young people, as tailoring requires long hours and can take many years to fully master. One tailor even noted that it would take as long to train a tailor as it would a doctor.

> *"Rents are so expensive, it becomes impossible to train apprentices because you cannot run a business and train someone and pay them all at once. Young people are creative and have good ideas but they don't want to be unpaid and work under bad conditions."*
>
> Sole trader, Berwick Street, Soho

Theme 4: Tailors and supporting services and industries need to be clustered together

5.40 The West End is already renowned for its concentration of high-quality tailors. The 'supporting cast' are equally important, and this includes contractors and alteration tailors and suppliers of fabrics and accessories. Tailors need to be close to their suppliers as the nature of work is different

[14] Skillfast-UK: *'The Art of Bespoke Tailoring: Identifying future training needs'* (August 2004), page 3.

from client to client and thus supply requirements vary – for example, if a customer requests a special type of fabric. There is a need for cutters and fitters to work in close proximity to those involved in the completing garments, as work is manually based and transferred, and is sometimes needed very quickly.

> *"Businesses need to be clustered and within walking distance because they all rely on one another."*
>
> Sole trader, Lexington Street, Soho

> *"Our customers expect to see tailoring activities going on, on the premises – that's why they come to us."*
>
> Medium sized bespoke business, Savile Row

5.41 There was a sense of community among tailors: whilst most offer bespoke tailoring, they are not necessarily in competition. Many examples were given, and there is good evidence to show that separate businesses frequently work with one another and do favours for one another.

> *"Most tailors do their own thing but there is still friendly interaction; I'd send a customer to another tailor if I knew they wanted a different type of suit to what I do."*
>
> Small sized bespoke business, Savile Row

Theme 5: Tailoring needs to be protected as a key cultural, historical and creative part of London

5.42 London is internationally famous as a centre for bespoke tailoring. Tailors stated that this was not only their view but that of their clients, many of whom come from overseas and who recognise Savile Row as the home of high quality clothing. Tailoring thus has a role in drawing in visitors, many of whom have high disposable income and who contribute to the capital's economy. Bespoke tailors emphasised that their industry was an under valued asset that needed careful protection. Many were fearful that Savile Row would become another high street, which would in future be remembered as the former home of bespoke tailoring.

> *"Like Champagne from Epernay and Parma Ham from Italy, a true bespoke suit should be made in Savile Row."*
>
> Large sized bespoke business, Savile Row

> *"Savile Row needs protecting - above all it needs to be a living street, and not a museum, and certainly not a high street."*
>
> Large sized bespoke business, Savile Row

Theme 6: Non-bespoke retailers are changing the face of Savile Row

5.43 Many bespoke tailors bemoaned the presence and growth of many new businesses on Savile Row, which do not provide a truly bespoke service. New businesses provide either made-to-measure or off-the-peg types of suits, which differ in important respects to bespoke suits. Long-standing tailors in the West End (and especially Savile Row) feel this is diluting the prestige and essence of Savile Row, by encouraging customers to buy lower quality garments. Customers think they are buying a bespoke suit simply because they are buying from Savile Row, and in the long-term tend to be disappointed and do not return again.

> *"Savile Row is now a minefield for the unknowing public. The public needs more education on what is good and bad. Tailoring would benefit from some kind of licensing system with a badge for the true bespoke tailors."*
>
> Sole trader, Berwick Street, Soho

6. Case studies

6.1 Further to the questionnaire and telephone interviews, a number of site visits were undertaken to bespoke tailoring premises. The four businesses surveyed varied in important ways, and each case study is described in further detail in the following section. Nevertheless, there were a number of common themes, which are summarised as follows.

Theme 1: Tailors need to work in close proximity

6.2 This theme came through during the survey, and was emphasised during site visits by the tailors themselves. The process of making a suit is complex and sequential: tailors specialise in different stages of garment production, and need to be close to one another to pass work on, to make amendments, and to share materials, fabrics and tools. The case studies illustrated that workshops are busy environments, where employees interact at both a social and professional level.

Theme 2: Tailors need to be trained on site

6.3 The training of younger tailors can only realistically be achieved when they are based in house, where the necessary resources are available, and where more senior staff can provide supervision. Bespoke tailoring businesses have a heavy workload, and sending staff out to outside premises to help train tailors is something they are reluctant to do. All businesses do, however, appreciate the importance of training skilled craftspeople and are interested in developing effective and collaborative approaches to this end.

Theme 3: Manufacturing and retailing are intrinsically linked

6.4 Linking manufacture and retailing is important. For example, tailors demonstrated examples of work that needed completing urgently, and that it was important for work to commence as soon as possible on site, rather than being sent to a workshop elsewhere. Staff measuring and fitting clients in the retail space of the business have an equal interest in overseeing the production of suits, and thus need to liase closely with tailors based in the workrooms.

Theme 4: Workrooms are busy and confined environments

6.5 Retail activities are generally undertaken at the most prominent 'front lounge' locations on the ground floor. Consequently, workroom activities are located in basements or on the upper floors. Despite the stated importance of having workroom space, most were found to be busy and confined environments.

6.6 There is clearly a limited amount of floorspace in the West End and in Savile Row, and rents also mean that bespoke tailoring businesses have to be efficient with space. Many businesses said they would like more space, so long as this is affordable. The quality of this space is also important; for example, tailors need access to natural daylight (as opposed to fluorescent light), especially for fitting buttons, sewing pockets and buttonholes, and adding linings.

The importance of daylight is illustrated by work benches that are located by windows

Theme 5: Current conditions in the West End that do not assist tailoring businesses

6.7 When asked, most tailors felt that there is still strong demand for bespoke products. However, a number of issues were stated by tailors as contributing to an undermining of the success of bespoke tailors, including the introduction of the Congestion Charge, limited parking in the area, the cost of rents and rates, and pressure from retail and office uses seeking a presence on Savile Row.

Theme 6: The higher the proportion of business derived from bespoke tailoring, the higher the proportion of floorspace devoted to workroom activities

6.8 In contrast to ready-to-wear and made-to-measure garments that are sold but not generally produced/altered on site, bespoke tailoring requires space for employees to work in, and for fabrics and equipment to be held. For example only 13% of floorspace at Henry Poole is used for retail activities, whereas at Gieves & Hawkes – where only 20% of all turnover at their Savile Row branch is derived from bespoke tailoring – 35% is used for retail activities. Bespoke tailoring is a craft industry as well as pure retailing, and the two activities are inherently linked.

Case Study 1: Henry Poole & Co.

Henry Poole & Co.
15 Savile Row
London
W1S 3PJ

- Visit hosted by: Angus Cundey (Director)
- Number of employees: 38 (of which 30 tailors or cutters)
- Workroom, retail, storage and office activities
- Total floorspace: 386m^2
- Turnover: derived mostly from bespoke tailoring

- The oldest bespoke tailors on Savile Row, established in 1806. Henry Poole has produced garments for the cream of the political, royal and economic establishment for two centuries, and specialises in traditional English men's tailoring.
- Henry Poole has been owned and managed since its beginning by the same family.
- Retail space makes up a relatively small portion of floorspace, being based on the ground floor. There is also a window which fronts onto Savile Row and showcases Poole's work.
- Workroom space is the largest use, and is based at the basement, ground, first and second floors. Workrooms are visible at the basement of Savile

- Row, and as well as adding to the charm of the area for potential customers, allow natural daylight into the building, which is crucial to people doing the detailed finishing of suits (e.g. sewing on buttons, stitching pockets and button holes).
- Employees specialise in a particular step in suit production, for example in either fitting, cutting, building or finishing suits. It is very important that employees work close together in such a way as to pass on and receive work.
- Clientele is approximately 40% American, 30% European, and 20% British. Henry Poole tailors go on international sale visits several times a year.
- Several young members of staff at present, with different backgrounds and training
- Member of Savile Row Bespoke Ltd. Also a member of the Walpole Group, an organisation of leading British companies formed to promote the values of British quality style, craftsmanship, creativity and service.

Case Study 2: Hardy Amies

Hardy Amies
14 Savile Row
London
W1S 3JN

- Visit hosted by: Tim Maltin (Chairman and Chief Executive)
- Number of employees: 15 (of which 2 men's' tailors/cutters, 10 women's tailors/cutters)
- Workroom, retail, storage and office activities
- Total floorspace: 835m^2
- Turnover: Around 10% derived from bespoke tailoring

- One of the few true couture houses in the UK, established in 1945. Traditional emphasis has been on womenswear, but menswear has recently been relaunched. Ratio of 80:20 womenswear to menswear.
- Offer a range of products, from ready-to-wear, to bespoke and personal couture.
- Based in a grade II* listed townhouse dating back to 1767.
- Large floorspace where all activities are undertaken: design, retail, office, storage and production. First floor also has a catwalk area for showcasing collections and media photoshoots.

- Clientele is largely British (around 80%), which differs to many other bespoke businesses. Products are also sold abroad in Japan through licensing arrangements.
- Although all work is undertaken in house, they do rely on suppliers and it is important that they are in close proximity so that staff can go out and purchase the materials they need (e.g. buttons).
- Business has been affected by the introduction of the Congestion Charge, together with very limited parking in the area. Current redevelopment and building projects on Savile Row have given the area a disrupted feel.
- Emphasised the need to protect and promote tailoring, and to make Savile Row a living street, not a museum or a high street.
- There is a need for bespoke tailors to better market their products and better communicate with the public.

Case Study 3: Franco Santoro

Franco Santoro
26 Kingly Street
London
W1B 5QD

- Visit hosted by: Franco Santoro (owner)
- Number of employees: 1 (self-employed)
- Workroom space only
- Total floorspace: 16m^2 (shared)
- Turnover: 100% derived from bespoke tailoring

- Self-employed bespoke tailor involved in fitting and cutting suits. Contracts out trouser and jacket making to tailors nearby.
- Works at 26 Kingly Street, a building that is home to around 20 tailors, most of whom are also self-employed.
- Used to work in Carnaby Street for twenty years but was forced to move together with many other tailors in 2002 when landowner decided against renewing his lease.
- Feels that rents and rates are very expensive for the amount of space he has. Rent has trebled since moving from Carnaby Street.
- Works in a small room shared with another tailor and has concerns with working conditions. In particular, there is a lack of light and air, whilst nearby external air conditioning and plant facilities produce loud noise. Workroom space was converted from office use, but is not necessarily suitable.
- In his view, landowners appear to want to force out tailors. Because most tailors are self-employed and do not speak 'with one voice', there is a sense that property-owners cannot be influenced.

- First floor location with lack of showroom space means that there is little passing trade.
- Long-term future of tailoring is uncertain. Feels there is a lack of young people coming into the industry, as most are keener on design.

Case Study 4: Gieves & Hawkes

Gieves & Hawkes
1 Savile Row
London
W1S 3JR

- Visit hosted by: Mark Henderson (Chief Executive) & Ray Stowers (Bespoke Manager)
- Number of employees: 61 (of which 24 tailors / cutters)
- Workrooms, retail, storage and office activities
- Total floorspace: 1415m^2
- Turnover: 20% derived from bespoke tailoring

- Bespoke tailors with naval and military traditions, and a number of prestigious royal warrants. Produce around 700 suits per year, and estimate that the Savile Row area produces 6,000 - 7,000 suits annually.
- Based at 1 Savile Row since 1912, a grade II listed building. Also rent basement of number 2 Savile Row, which has been merged to create a large workroom space. Have a number of stores nationally and internationally.
- Largest surveyed premises with 1415m^2 of space. Basement used for workrooms, storage and office; ground floor used for retailing; first, second and third floor are Gieves & Hawkes offices.

- Bespoke tailoring contributes to 20% of Savile Row store turnover. Remainder is largely ready-to-wear collection.
- Skilled employees all working beside one another, including fitters, cutters, tailors and alteration tailors. There is a need to be working together to ensure a quick turnaround of jobs. Many clients drop by and increasingly demand work to be completed at short notice. Clustering enables ideas, techniques and advice to be shared.
- Demand for bespoke products has always been high, and Gieves & Hawkes have organised their business in such a way as to be successful.
- Some self-employed tailors on premises, renting board space from Gieves & Hawkes.
- Contract work out to a total of 16 people, based both in the West End and around Greater London.
- Keen to recruit and train staff on Savile Row. Sought to develop links with Skillfast Uk and Newham College. Training would best be done on Savile Row, but there is a lack of space. Savile Row would benefit from a trainee academy based on-site where resources could be pooled from different businesses.
- Would be supportive of tailors from elsewhere in the West End moving to Savile Row. Opportunity to concentrate tailors closer to one another.
- Part of Walpole Group and Savile Row Bespoke Ltd.

7. Rental information and comparisons

7.1 Over the course of the survey and case studies it became clear that rents and rates were key issues for the bespoke tailoring sector. There was a perception by tailors that landowners and developers sought to attract activities that command higher rents such as offices and retail, in the premises occupied by bespoke tailors and that this could lead to the displacement of bespoke tailoring from its traditional location in the West End.

7.2 Further quantitative information was thus gathered to assess the differences in rental values by land use type. A search was conducted on the Valuation Office Agency (VOA) website comparing different properties, uses and areas[15]. The VOA records business rate lists, which can be used as a proxy for rental information as rates are based on a professional assessment of the annual rent of a property if it was available to let on the open market at a fixed valuation date. It should be remembered that valuation dates may be historic and so it is difficult to compare like for like valuations and between different properties.

7.3 Information was also provided by Drivers Jonas, agents for the Pollen Estate, the major landowner on and around Savile Row on levels of rent and rental growth in Savile Row compared to other streets in the West End. Information was also provided on the proportion of accommodation costs compared to employee costs in different bespoke tailoring business models.

Valuation Office Agency information

7.4 Table 8 shows a valuation summary for Hardy Amies, whose property is at 14 Savile Row. This example illustrates several key points. First, rents (£/m^2) vary according to different types of activity / land use. Showroom and office activities within the premises command values of £227-245m^2. By comparison, workshop activities only generate between £107-116 m^2. Appendix 4 includes further examples of summary valuations and emphasises that showroom, retail and office activities command higher rental values than workshop space.

7.5 The same table confirming another feature: rental levels are highest at ground floor, and decrease at upper levels (and where relevant, at basement level too). Ground floor locations are generally most easily accessible and visible to potential customers, and thus command higher rates than other floor levels. As noted in earlier section, the retail element of many bespoke businesses is generally found at the ground floor, whilst

[15] Rateable value data taken from Valuation Office Agency website: http://www.voa.gov.uk/business_rates/index.htm

workshop, storage and office uses are located elsewhere in the same building.

Table 8: Summary valuation: 14 Savile Row, W1S 3JN

Description	Floor location	£/m^2
Showroom	Ground	227-245
Office	Ground	227-245
Showroom	1st	227
Workshop	1st	107
Office	2nd	233
Workshop	2nd	116

7.6 Table 9 indicates the levels of rent likely to be generated by a non-bespoke fashion retailer on Savile Row. Because the premises are purely retail as opposed to mixed retail/showroom/office/workshop, rental values are higher: in this case £840 per square metre.

Table 9: Summary valuation: 28 Savile Row, W1S 2EU

Description	Floor location	£/m^2
Retail zone A	Ground	840

7.7 Lastly, table 10 compares ground floor rental levels in Savile Row with other areas in the West End. It shows that rental levels vary according to location as much as the type of activity. Although Savile Row lies in Mayfair rental levels charged here are lower than those for Carnaby Street, Bond Street and Regent Street – all of which have a much higher footfall of potential customers.

Table 10: Summary valuation by address

Address	Property description	Bespoke activities?	VOA Description	Floor location	£/m²
14 Savile Row, W1S 3PH	Hardy Amies	Yes	Showroom	Ground	227-245
1 Savile Row (& 6 Vigo Street), W1S 3JR	Gieves & Hawkes	Yes	Retail area	Ground	350
28 Savile Row, W1S 2EU	Richard James	No	Retail – Zone A	Ground	840
		No	Retail – Zone B	Ground	420
9-9A Bond Street, W1S 3SW		No	Retail – Zone A	Ground	4450
56-57 Carnaby Street, W1F 9QF	Soccer Scene – sports retailer	No	Retail – Zone A	Ground	1995
		No	Retail – Zone B	Ground	997
174-176 Regent Street, W1B 5TJ	The Original Levi's Store	No	Retail – Zone A	Ground	3200
		No	Retail – Zone B	Ground	1067-1600
		No	Retail – Zone C	Ground	534-800

Drivers Jonas Information on Comparative Rents

7.8 Drivers Jonas are the agents for the Pollen Estate. The Pollen Estate are the major landowner of that part of Savile Row and surrounding streets that forms the main focus of the bespoke tailoring industry in London's West End[16].

7.9 Information supplied by the Pollen Estate illustrates the extent of rental increases for retail premises in Savile Row compared to other streets and areas in the vicinity in the West End over the last 7 to 10 years. This is summarised in Tables 11 and 12.

Table 11: Comparison of base rental levels in selected Major Shopping Streets in the West End 1995 – 2005 (Zone A Retail) - £ per sq ft

Street	Use	Percentage increase
Oxford Street	Retail 30 ft Zone A	+ 72%
Regent Street	Retail 30 ft Zone A	+ 74%
Bond Street	Retail 30 ft Zone A	+ 125%
Savile Row	Retail 20 ft Zone A	+ 57%

Source: Drivers Jonas

[16] The Pollen Estate comprises 46 prime freehold properties in Mayfair, primarily in New Bond Street, Clifford Street, Cork Street, Savile Row, New Burlington Street, Maddox Street and Great Marlborough Street.

7.10 In terms of rental growth for rental use over the period 1995 – 2005, not surprisingly the increases in Savile Row fall well below those in the primary shopping frontages of the West End International Shopping Centre; i.e. Oxford Street, Bond Street and Regent Street (see Table 11), where footfall is much higher.

Table 12: Comparison of rental levels in selected specialised shopping areas in the West End 1997 – 2004 (£ per sq ft, ITZA)

Street/Area	Percentage increase
Mount Street	+ 38%
Jermyn Street	+ 40%
South Molton Street	+ 50%
Soho	+ 100%
Marylebone High Street	+ 160%
Savile Row	+ 52%

Source: Drivers Jonas and Colliers CRE

7.11 More interestingly during the period 1997 – 2004, Table 12 indicates that for retail premises the extent of rental levels growth in Savile Row of + 52% is mid-way in the range of growth in the selected specialised trading location. It has outperformed similar 'specialist trading' locations such as Jermyn Street.

7.12 Drivers Jonas has also provided an indication of rental growth for four 'tailoring units' that the Pollen Estate owns on Savile Row. The individual units cannot be identified for reasons of commercial confidentiality. This information indicates that for these four units there has been a growth in rents of 59% between 1990 and 2004, on a par with the increases achieved for retail premises in Savile Row over that period of time.

7.13 Drivers Jonas has also provided confidential information on employee costs compared to property costs for two bespoke tailoring businesses in Savile Row that represent different business models. These indicate that employee costs are a far greater cost to both businesses than accommodation costs. These costs may also affect the long-term viability of businesses on Savile Row.

8. Conclusions and next steps

8.1 This final section brings together some of the key findings of the questionnaire and case study site visits, and addresses the original study aims.

How many bespoke tailoring businesses are there in Westminster and where are they located?

8.2 The study identified 116 tailoring businesses in Westminster, of which 49 participated in the survey. It is clear that the West End still has a high concentration of bespoke tailors, clustered especially on Savile Row and in Soho. An estimated 6,000-7,000 suits are produced annually on and around Savile Row. This represents £21million turnover per annum[17].

8.3 Tailoring in the West End and Savile Row is a long-standing activity, and this is reflected in the fact that 42% of businesses have been at their current premises for 20 years or more, and 58% for 10 years or more. Those businesses that have had to move more recently tend to be smaller ones, especially in Soho. There is a general feeling that tailors wish to remain in the area, but that development pressure is coming from landowners.

How many people are employed in bespoke tailoring?

8.4 The businesses that responded to the survey employ a total of 324 people directly on their premises. A third of these are tailors or cutters, the remainder split between sales, office and administrative staff. A further 77 staff are employed by the same businesses at other premises, mainly within the West End.

8.5 Over 80% of businesses employ fewer than 10 people, and this is consistent with figures for the City of Westminster generally. Tailoring is a creative industry and employs a small but highly skilled workforce.

What kinds of activities and business linkages exist in bespoke tailoring?

8.6 A range of activities are undertaken by tailors, including measuring, cutting, building and fitting suits. Training is also undertaken on site, and it is important for apprentices to be learning on the job.

8.7 A proportion of bespoke tailors undertake the work entirely themselves but most have direct economic links to suppliers or other tailors – i.e. resource links and people links.

[17] Estimate of overall production by Mark Henderson, Chief Executive of Gieves & Hawkes, 1 Savile Row.

8.8 The nature of activities is such that clustering and business linkages are essential, for example to ensure quality control and to help train apprentices on the job. However, factors such as higher rents and rates and limited floorspace increasingly challenge this configuration.

8.9 Even though many businesses offer essentially the same product – namely, a suit – there is a sense of community amongst tailors who face similar issues and who are not necessarily in direct competition with one another. This applies as much to Savile Row and Soho as it does to, say, Hatton Garden for jewellery.

<u>What floor locations and size of premises do tailors occupy?</u>

8.10 Bespoke tailoring occupies nearly 8 000m^2 of floorspace in the West End. Bespoke tailors are found mostly at basement and ground floor level. There are substantial benefits in being located at street level, in terms of displaying products and attracting clients, as well as contributing to the character and function of an area. This is especially true in Savile Row, whilst in Soho, many smaller businesses tend to be found on upper floors.

8.11 There is a great disparity in floorspace size between different businesses: on the one hand, some of the iconic Savile Row tailors occupy over a thousand square metres, whilst in Soho there are self-employed, elderly tailors working in very small workshops.

<u>What is the balance between manufacturing and retailing elements?</u>

8.12 Bespoke tailoring is a creative manufacturing enterprise as well as a retailing business; suits are cut and built by an individual for an individual. Despite pressure to be space and cost efficient, most businesses do still undertake manufacturing work on site. Respondents emphasised that linking production to retailing is an important and essential tradition, because there are many complex stages involved in the production of garments and as such, staff need to work and train in close proximity. The boundaries between retailing and manufacturing are usually blurred, and for many tailors the two are intrinsically linked. Retail activities are generally found at ground floor, which means that other activities such as manufacture, administration and storage are undertaken at basement or upper floors.

<u>What rents are paid by bespoke tailoring businesses on and around Savile Row compared to other activities and areas within the West End</u>

8.13 Based on information from the Valuation Office Agency and information provided by Drivers Jonas it is clear that rental levels paid by bespoke tailoring businesses have increased in the last 10 years. The extent of increase is similar to high class fashion retail businesses on Savile Row with increases in rental levels for high class fashion retail and bespoke tailoring of over 50% since 1995.

8.14 Whilst rental growth for retail premises on Savile Row has been lower than on the prime shopping frontages in the West End, such as Oxford Street, Regent Street and Bond Street, it has been higher than some other specialist trading areas such as Jermyn Street.

8.15 Although accommodation costs are one aspect of bespoke tailor's costs they are a significant cost which has increased quite markedly in the last decade.

<u>What are the key issues facing tailors?</u>

8.16 There are a range of wider issues which need to be addressed to protect the vitality and viability of bespoke tailoring in London's West End. Businesses stated that the following issues were the most pressing and important ones facing their sector:

1. Rents and rates are expensive;
2. An industry under threat;
3. A need to address recruitment and training;
4. Tailors and supporting services and industries need to be clustered together;
5. Workshops should be on-site and larger, and tailors and apprentices need to work in close proximity;
6. Tailoring needs to be protected as a key cultural, historical and creative part of London;
7. Non-bespoke retailers are changing the face of Savile Row.

<u>Next steps</u>

8.17 The city council intends to use the findings of this research to further engage with the landowners, the tailoring industry and agencies such as the London Development Agency and the Central London Partnership to ensure the future of Savile Row as the international home of bespoke tailoring in central London.

8.18 Actions to be considered will include:

- The creation of a Savile Row Strategic Group, led by the City Council, to bring together key players in the future of Savile Row. This will include representatives of the landowners and bespoke tailoring companies on and around Savile Row.
- Greater co-ordination and promotion of Savile Row as the destination and home of bespoke tailoring.
- Support for skills and training initiatives.
- Identify the medium term future floorspace needs of the tailoring industry on and around Savile Row and influence landowners to meet those needs.

- Review existing planning policy and guidance as part of the transformation of the city council's Unitary Development Plan (UDP) into the new Local Development Framework (LDF) for Westminster.

Appendix 1: Bespoke tailoring letter and questionnaire

City of Westminster

Please reply to: Edward Bergin
Direct Tel. No: 020 7641 2603
Direct Fax No: 020 7641 3050
Email: ebergin@westminster.gov.uk

City Planning Group
Department of Planning and
City Development
Westminster City Hall
64 Victoria Street
London SW1E 6QP

29th June 2005

Dear Sir/Madam

Westminster City Council is committed to safeguarding and promoting the West End as London's core retail, entertainment and business centre. Savile Row is a prime example of an area with a unique character and history, with an international reputation for tailoring and fashion. Tailoring and its associated industries are under intense pressure from other competing land uses, which are seeking to obtain a presence in the prestigious Savile Row area.

Westminster City Council is committed to protecting tailoring services and industries. In order to do so, we are seeking to collate information on the activities, size, clustering and economic importance of tailoring businesses in the West End. In particular, we wish to confirm the extent and nature of bespoke tailoring in central London. We would be grateful if you would complete the short questionnaire attached to this letter and return it by Monday 18th July.

The information you provide will be inputted into a database and used for planning policy purposes. This information will be aggregated and details of individual businesses will be kept confidential. Your assistance will help the Council to support the economic function of Savile Row and to protect its character.

Please feel free to contact Graham Hadley on 020 7641 2503 for further advice on planning policy matters, or Edward Bergin for queries relating to this questionnaire.

Thanking you in advance for your help.

Yours faithfully,

Edward Bergin
City Planning Group

Name of business/ tailor:
Address:
Telephone number:
Email address:

1	**Date your business first occupied your current premises?**	
2	**Is your business a member of any tailors' organisation or guild? If so please list the relevant organisations.**	
3	**Number of people you employ at your premises (not including any contractors at other addresses)?**	
4	**Are these all tailors? How many are tailors and how many are retail / other staff?**	
5	**Number of people you employ at other premises employed in tailoring (and addresses)?**	
6	**Nature of your tailoring business at your premises – e.g. bespoke tailoring, workshop, showroom, alterations?**	
7	**Links to any other tailoring businesses / contractors, e.g. piece workers / self-employed or other sub-contractors? Please provide names and addresses and details of the type of work they carry out on behalf of your business.**	

8. Please fill in the following table by giving an estimate of the floorspace (in square *metres*, if possible) devoted to different types of use at different levels at your premises.

	Retail: tailoring	Retail: other	Workrooms	Storage	Offices / other	Total
Basement / lower ground floor						
Ground floor						
First floor						
Second floor						
Other floors						

9	If your workshops are *not* at the same premises as your main business where are they located?	
10	If your retail outlets for bespoke tailoring are not in the same building as your main business where are they located?	
11	What percentage of your business' turnover is derived from bespoke tailoring?	
12	If you have any other information which you consider would be useful for the City Council to understand the nature of the tailoring business within central London, please feel free to add your comments.	

Appendix 2: List of survey participants

Company	Address	Postcode	Website address
A D Phillips	23 Noel Street	W1F 8GT	
Addison & Steele	27 Gloucester Place	W1U 8HU	www.addisonsteele.com
Alexandre	39 Savile Row	W1S 3QF	
Anderson & Sheppard Ltd.	32 Old Burlington Street	W1S 3PT	
Bob Tailoring	58 Maddox Street	W1S 1QD	
Chittleborough & Morgan at Nutters	19 Savile Row	W1S 3PP	
Chris Christodoulou	38 Frith Street	W1D 5LJ	
Cordings	19 Piccadilly	W1V 0PE	www.cordings.co.uk
Davies & Son Ltd.	38 Savile Row	W1S 3QE	www.daviesandsonsavilerow.com
De Mennato Tailors	22 D'Arblay Street	W1F 8DQ	
Dege & Skinner	10 Savile Row	W1S 3QE	www.degesavilerow.co.uk
Denise Joannides	23 Noel Street	W1F 8GT	
Denman & Goddard	13 New Burlington Street	W1S 38G	www.denman-goddard.co.uk
Douglas Hayward	Flat 1 95 Mount Street	W1K 2SZ	
Eddie Kerr Bespoke Tailor	52 Berwick Street	W1F 8SJ	www.eddiekerr.co.uk
Ede & Ravenscroft	8 Burlington Gardens	W1X 1LG	www.edeandravenscroft.co.uk
Franco Santoro	26 Kingly Street	W1B 5QD	
Georgiou & Sheenan	25 Kingly Street	W1B 5QD	
Gerald Freedman	Second Floor, 5 Old Compton Street	W1D 5JE	
Gieves & Hawkes	1 Savile Row	W1S 3JR	www.gievesandhawkes.com
H. Huntsman & Sons Ltd.	11 Savile Row	W1S 3PS	www.h-huntsman.com

Company	Address	Postcode	Website address
Hardy Amies	14 Savile Row	W1S 3JN	www.hardyamies.com
Henry Poole & Co.	15 Savile Row	W1S 3PJ	www.henrypoole.com
Jarvis & Hamilton	11 St George Street	W1S 2FD	
John Pearse	6 Meard Street	W1F 0EF	www.johnpearse.co.uk
Jusseppe	26 Kingly Street	W1B 5QD	
Kilgour, French & Stanbury Ltd.	8 Savile Row	W1S 3PE	www.8savilerow.com
L.G. Wilkinson	11 St George Street	W1S 2FD	
Manning & Manning	Fifth Floor, 9-10 Savile Row	W1S 3PF	www.manning-and-manning.com
Maurice Sedwell Ltd.	19 Savile Row	W1S 3PP	www.savilerowtailor.com
Mr Thomas	51 Lexington Street	W1F 9AR	
N Demetriou	47 Berwick Street	W1F 8ST	
Nick Tentis	6-7 Avery Row	W1K 4AL	
Nino's International Tailoring	13 Quadrant Arcade, 80-82 Regent Street	W1B 5HL	www.ninos.co.uk
Paul Kitsaros	66 Cleveland Street	W1T 6LU	
Peter Procopiou	83-84 Berwick Street	W1F 8TS	
Richard Anderson	13 Savile Row	W1S 3PH	www.richardandersonltd.com
Richard James	29 Savile Row	W1S 2EY	www.richardjames.co.uk
Sam Arkus (mens Outfitter) Ltd.	60 Berwick Street	W1F 8SU	
Scherer & Nilsson Ltd.	13 New Burlington Street	W1S 3BG	
Spencer Hart	36 Savile Row	W1S 3QB	
Steed	9 Savile Row	W1S 3PF	www.steed.co.uk
Steven Hitchcock	13 New Burlington Street	W1S 3BG	www.stevenhitchcock.co.uk

Company	Address	Postcode	Website address
The Savile Row Company	40 Savile Row	W1S 3QG	www.40savilerow.co.uk
Thomas Mahon	20 Savile Row	W1S 1AE	www.thomasmahon.co.uk
Tom Baker Bespoke Tailoring	83-84 Berwick Street	W1F 8TS	
V. Papandrea	19 Savile Row	W1S 3PP	
Ward & Kruger	6 Sackville Street	W1S 3DD	
Welsh & Jefferies Ltd.	20 Savile Row	W1S 3PR	

Appendix 3: Business associations

Business association	Description
Merchant Taylors' Company	Founded in the 13th Century as a religious and social fraternity, today the Company is an association of philanthropic and social character, devoting its energies to educational and charitable activities. Awards an annual Golden Shears prize to students or trainees involved in tailoring. The Company provides annual Bursaries to deserving students attending the London College of Fashion and makes annual contributions to the two trade charities, the Master Tailors' Benevolent Association (MTBA) and the Tailors' Benevolent Institute (TBI). (www.merchanttaylors.co.uk/)
The Guild of Master Craftsmen	The Guild of Master Craftsman represents skilled crafts people from across the range of craftwork including tailoring. It promotes the craft, art, trade and vocation to safeguard the interests of the craftsmen and the public. It provides a symbol of quality covering quality, craftsmanship and customer service. (www.thegmcgroup.com)
Savile Row Bespoke Ltd.	Set up in 2004, Savile Row Bespoke Ltd (SRB) is a company that seeks to protect and promote the art of bespoke tailoring on Savile Row. It members are limited to businesses that offer bespoke tailoring on Savile Row only.
The Walpole Group	A non-profit organisation of leading British companies formed to promote the values of British quality style, craftsmanship, creativity and service. One of Walpole's objectives is to devise and implement promotional opportunities in the UK and overseas in which members can target the consumer and key people in the business, financial, political and media worlds in order to expand their businesses through Walpole. www.thewalpole.co.uk

Appendix 4: Comparative Rental value data used to determine rateable values

Business rates are paid by most occupiers of business property as a way of contributing towards the cost of local services[18]. Although local authorities issue the bills and collect business rates, the total amount collected across the country goes into a central rate pool for England. This is managed by the Office of the Deputy Prime Minister (ODPM), which redistributes the funds to local authorities, and to other bodies like police and fire authorities.

Local authorities calculate rates bills by multiplying the rateable value by a factor set by central government each year called the multiplier, or Uniform Business Rate (UBR). For example, in 2005/06 the multiplier is 41.5p (excluding the supplement to fund the Small Business Rate Relief). So, if the rateable value of a property is £10,000, a local authority would multiply it by 41.5p to get a total for the year of £4,150, before any rate relief is applied.

The table below shows information about the rental value of selected properties in the West End. As such it is not a measure of business rates, nor does it include any reliefs to which the business might be entitled. However, it does show differences in rental values according to location, floor location and type of activity. This figure is based on a professional assessment of the annual rent of a property if it was available to let on the open market at a fixed valuation date. The Valuation Office Agency (VOA) gathers as much evidence as possible about actual rents paid for properties in order to determine appropriate rental values. The most recent revaluation came into effect on 1st April 2005, and was undertaken by the VOA.

[18] Information taken from www.mybusinessrates.gov.uk – an official government website on business rates. Rateable value data taken from Valuation Office Agency website: http://www.voa.gov.uk/business_rates/index.htm

Address	Property description	Bespoke Activities	VOA Description	Floor location	£/m^2
14 Savile Row, W1S 3PH	Hardy Amies	Yes	Showroom Office Showroom Workshop Office Workshop	Ground Ground 1st 1st 2nd 2nd	227-245 227-245 227 107 233 116
1 Savile Row (& 6 Vigo Street), W1S 3JR	Gieves & Hawkes	Yes	Storage and vaults Cutting room Office Retail area Office Office Workshop Office	Basement Basement Basement Ground Ground 2nd 3rd 3rd	166-175 175 257 350 221 221 105 209
8 Burlington Gardens, W1S 3ET	Ede & Ravenscroft	Yes	Retail – Zone A Retail – Zone B	Ground Ground	850 283 – 425
28 Savile Row, W1S 2EU	Richard James	No	Retail – Zone A Retail – Zone B	Ground Ground	840 420
Pollen House, 10-12 Cork Street, W1S 3NP		No	Office	3rd	400
32 Old Burlington Street, W1S 3AT		No	Office	1st	245
9-9A Bond Street, W1S 3SW		No	Shop – retail zone A	Ground	4450
56-57 Carnaby Street, W1F 9QF	Soccer Scene – sports retailer	No	Retail – Zone A Retail – Zone B	Ground Ground	1995 997
174-176 Regent Street, W1B 5TJ	The Original Levi's Store	No	Retail – Zone A Retail – Zone B Retail – Zone C	Ground Ground Ground	3200 1067-1600 534-800

The valuation scheme consists of the value per square metre (m²)(or unit value), car parking, other additional items, and plant and machinery (as appropriate).

Appendix 5: Maps

Map1: Bespoke Tailoring: Planning Policy Designations

Map 2: Conservation Areas and Listed Buildings

Map 3: Survey participants

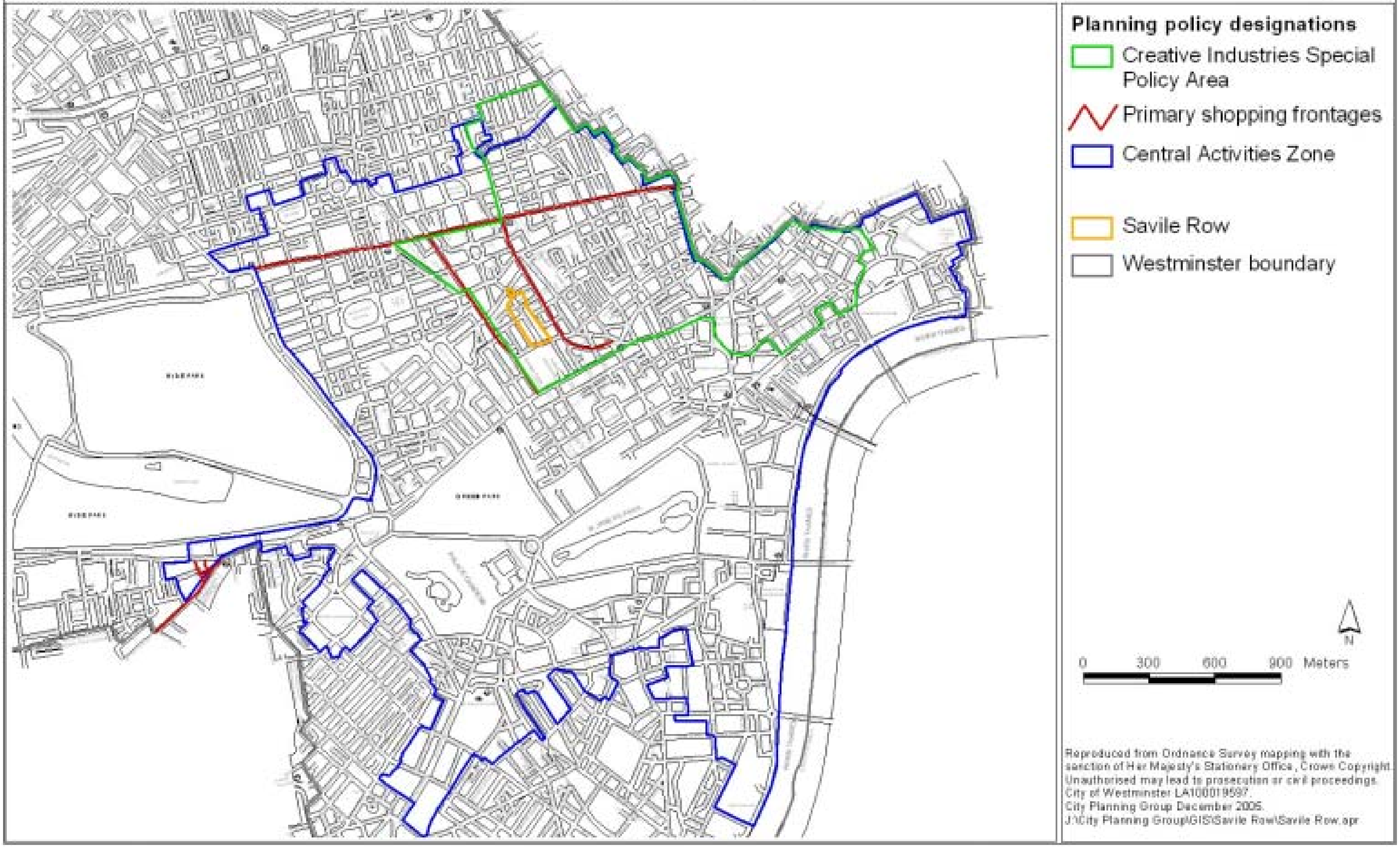
Map 4: Bespoke Tailoring Business at Ground Floor

Map 5: Bespoke Tailoring Business at Basement Level

Map 6: Bespoke Tailoring Business at Upper Floors

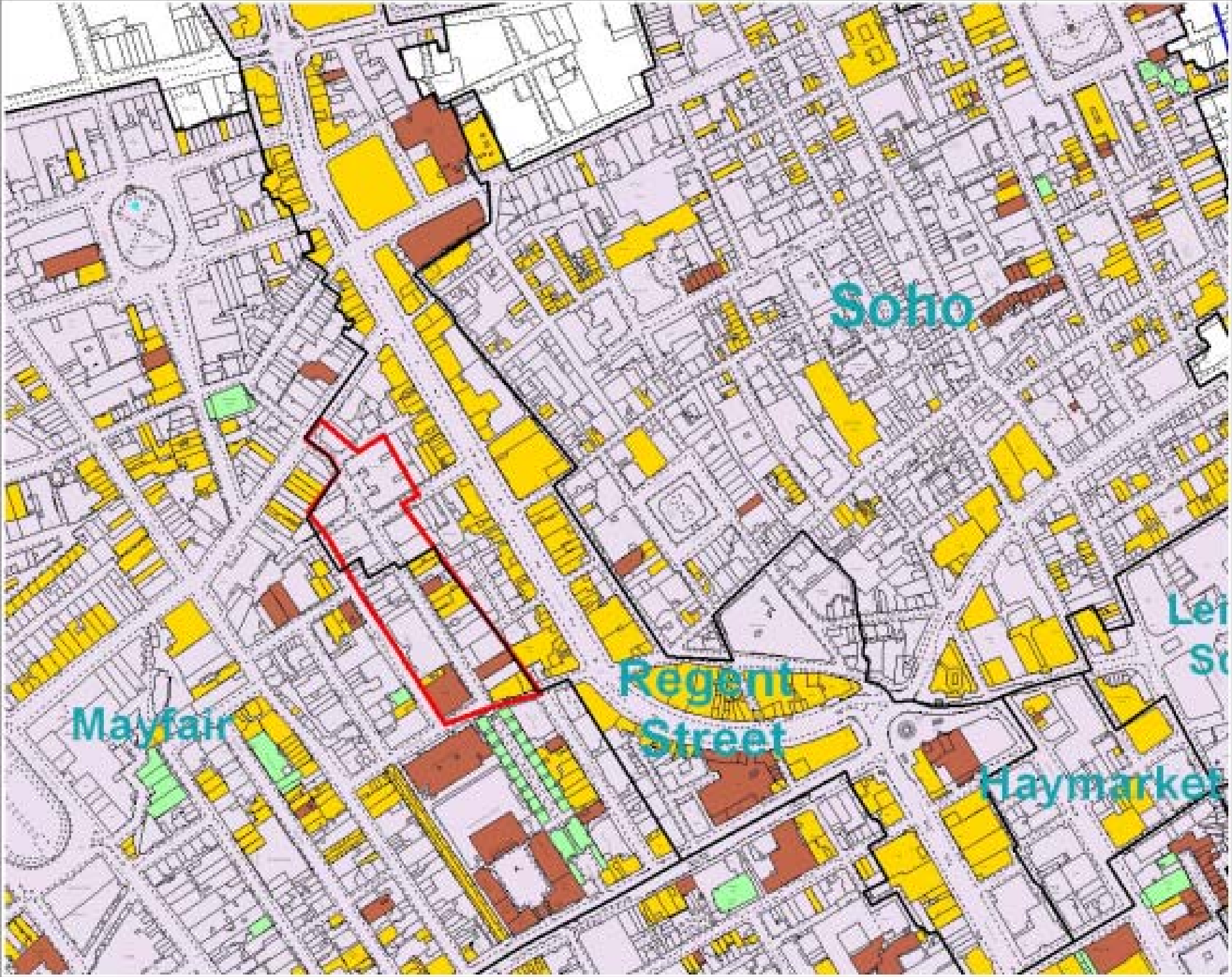
Bespoke Tailoring: Planning Policy Designations

Map 1



Conservation Areas and Listed Buildings

Map 2



Listed buildings:
- Grade I
- Grade II*
- Grade II

Conservation Areas
e.g. Mayfair

Savile Row

N

0 100 200 Meters

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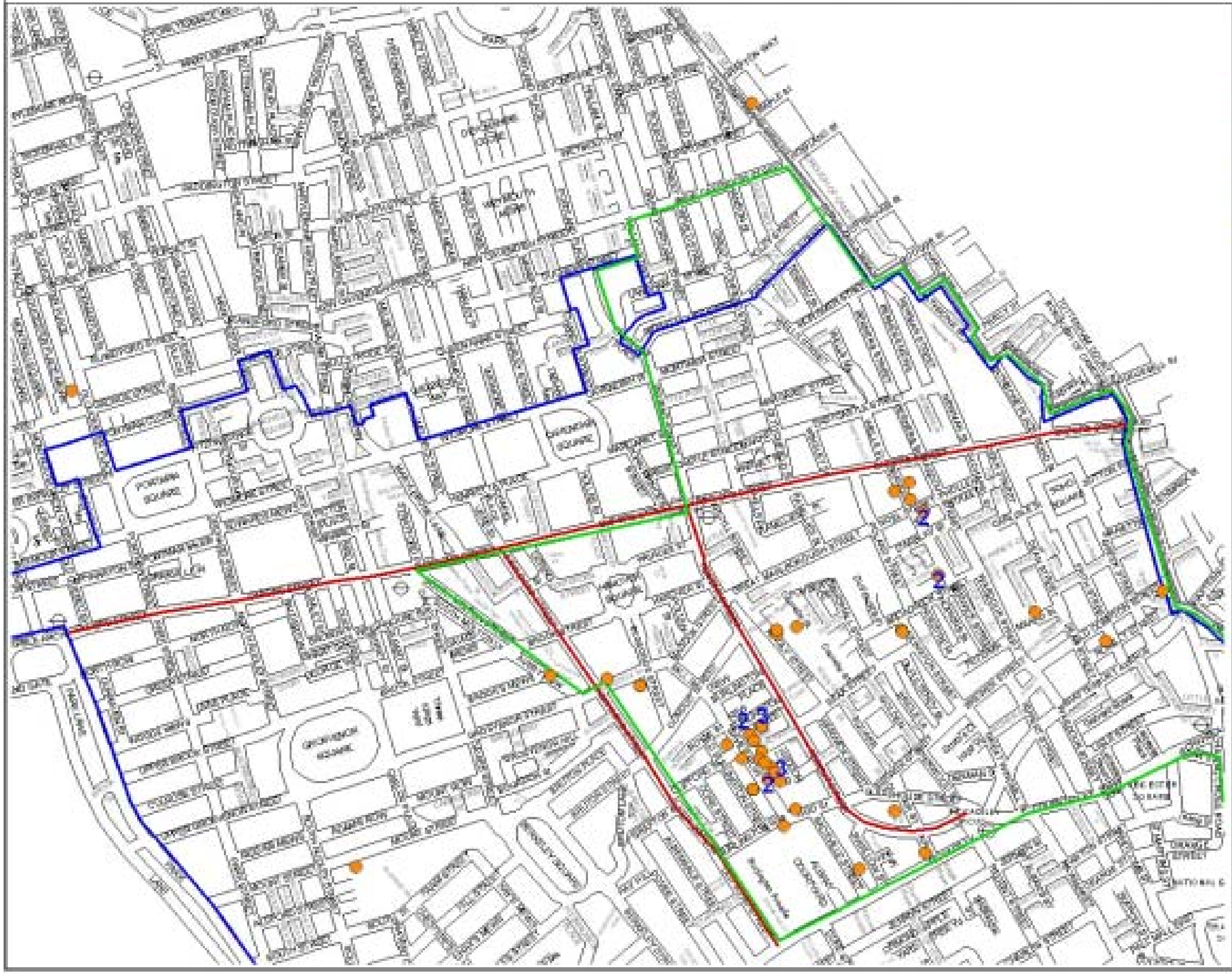
Survey participants

Map 3



- Creative Industries Special Policy Area
- Primary shopping frontages
- Central Activities Zone
- Westminster boundary
- Responding bespoke tailoring business (numbers = number of businesses at one address)

N

0 200 400 Meters

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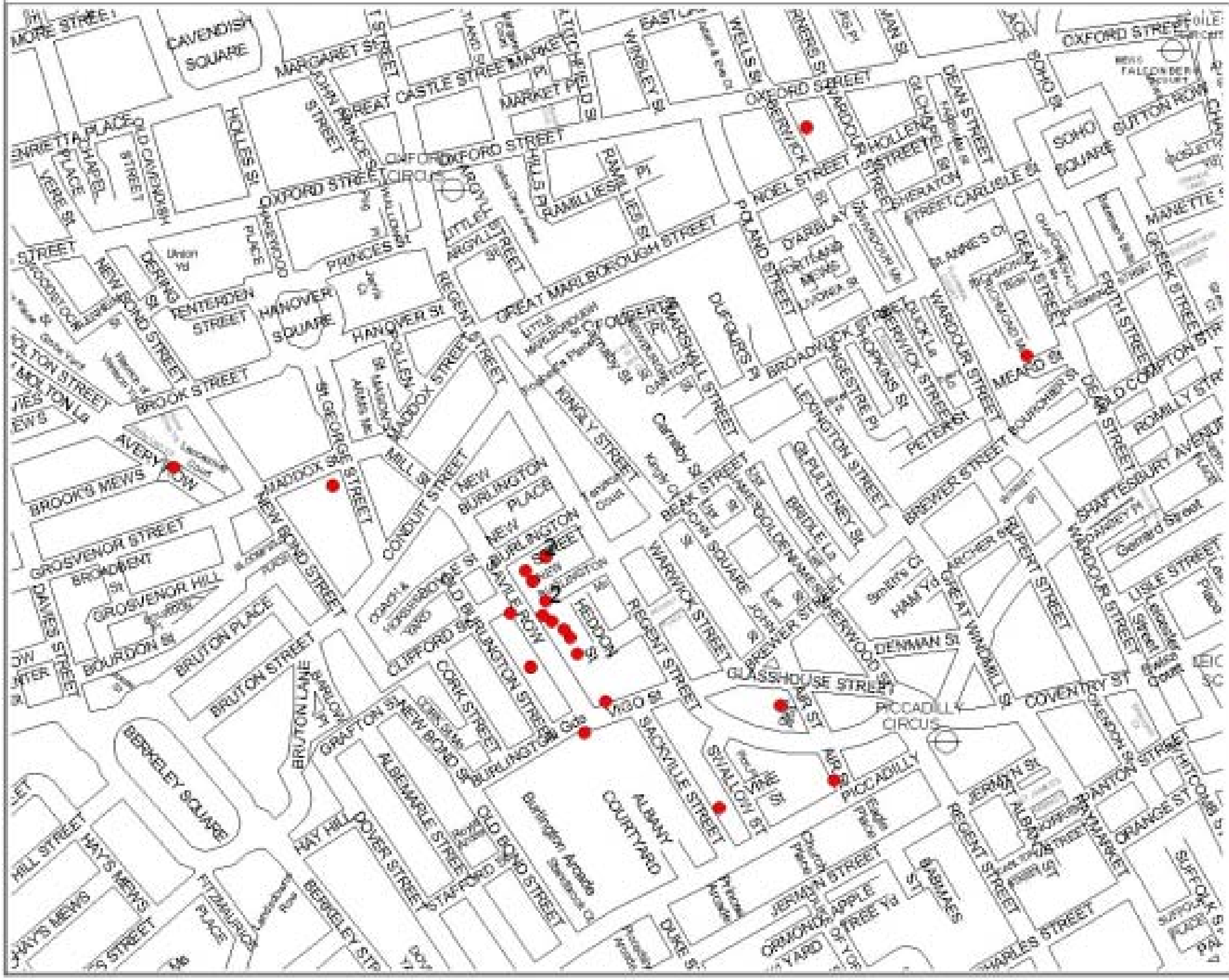
Bespoke Tailoring Businesses at Ground Floor

Map 4



● Bespoke tailoring business occupying upper floor level (numbers = number of businesses at one address)

Central Activities Zone

Westminster boundary

0 100 200 Meters

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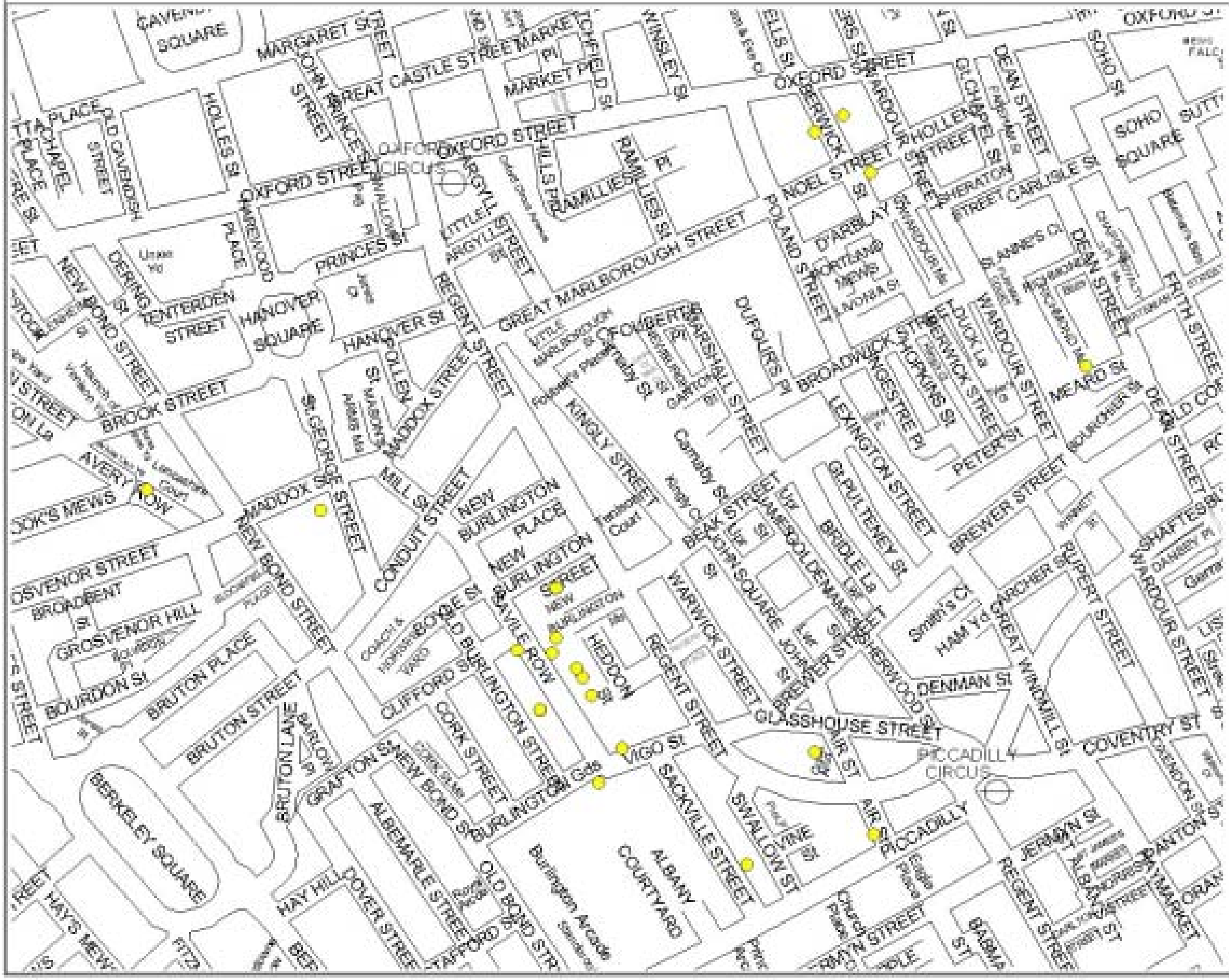
Bespoke Tailoring Businesses at Basement Level

Map 5



Bespoke tailoring business occupying upper floor level (numbers = number of businesses at one address)

Central Activities Zone

Westminster boundary

N

0 100 200 Meters

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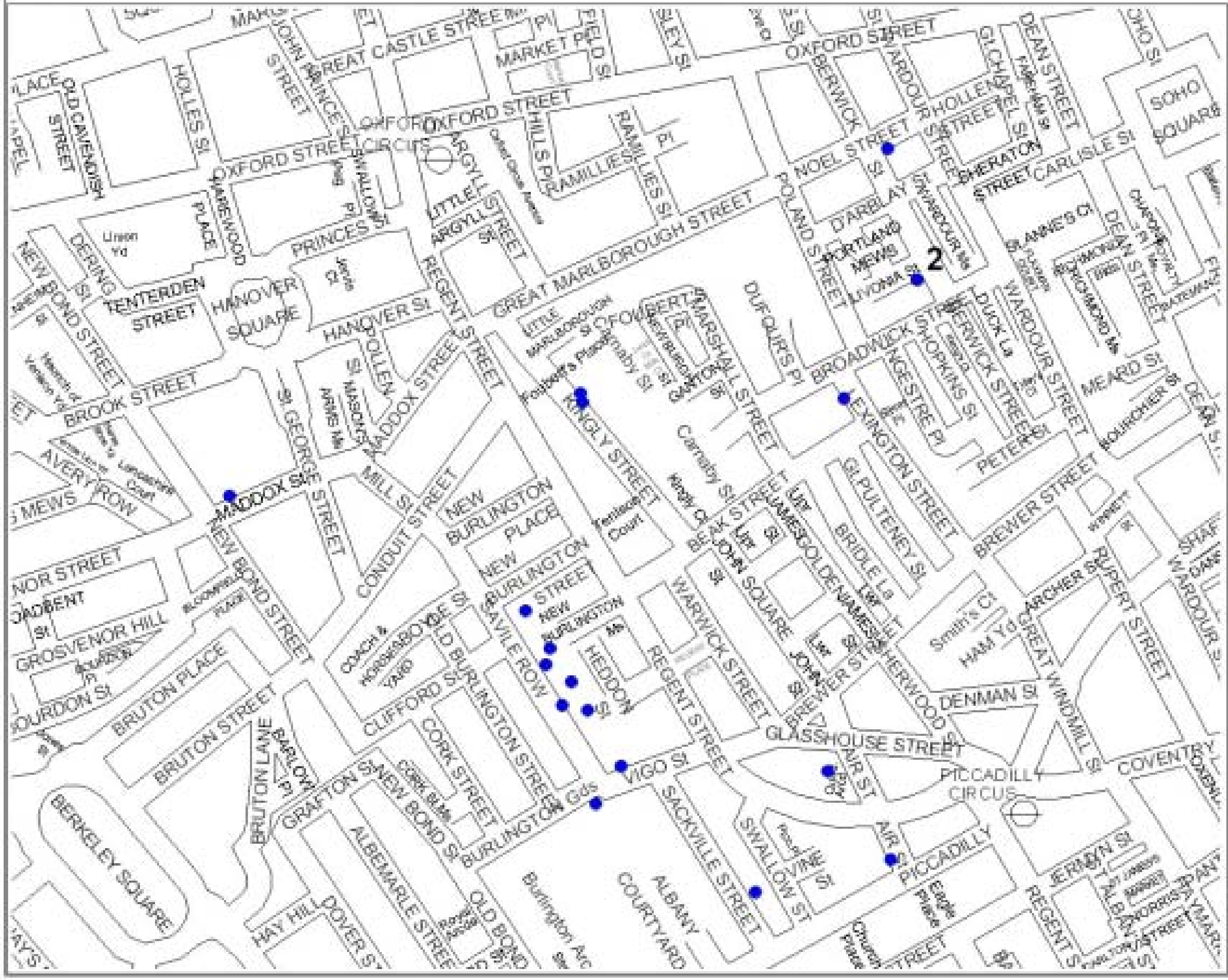
Bespoke Tailoring Businesses at Upper Floors

Map 6



- Bespoke tailoring business occupying upper floor level (numbers = number of businesses at one address)
- Central Activities Zone
- Westminster boundary

N

0 100 200 Meters

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