

# Opportunity Area Portrait

## Heathrow



# Introduction

## List of acronyms and abbreviations

- OA: Opportunity Area
- LP: London Plan
- GLA: Greater London Authority
- TfL: Transport for London
- OAPF: Opportunity Area Planning Framework
- CAZ: Central Activities Zone
- LESD: London Employment Sites Database
- SHLAA: Strategic Housing Land Availability Assessment
- LB: London Borough
- RB: Royal Borough
- AAP: Area Action Plan
- SPD: Supplementary Planning Document
- SIL: Strategic Industrial Land
- LSIS: Locally Significant Industrial Sites
- BID: Business Improvement District
- CEZ: Creative Enterprise Zone

# Introduction

## Purpose of this document and clarifications



### What is a pen portrait:

- A strategic analysis/ summary of an OA.
- We collected a series of data on delivery of homes, jobs, town centres and high streets, transport, land use and industrial land to assess local change at a strategic level, to better understand places in the OAs, and evaluate how they are performing against the expectations in the London Plan 2021.



### How will this information be used?

- This evidence base supports the OA propositions in the Towards a new London Plan document.
- The OA propositions include:
  - change in the status of the OA to reflect the housing and/or infrastructure delivery since 2019
  - highlight opportunities to review the OA boundary and/ or OA designation.



### Data sources and clarifications

#### Homes

- The London Plan 2021 identifies indicative homes capacities (10 year, 22 year).
- The indicative homes capacities are based on the SHLAA 2017.
- The monitoring year for the London Plan 2021 starts in 2019.
- This document includes an overview on the progress against the SHLAA 2017 to understand what has happened in the OA.
- Acknowledging that a lot has changed since 2017, including the adoption of new development plans, the current document provides an overview of site allocations based on the latest publicly accessible information.
- All spatial data is available in the London Datastore, unless stated otherwise.
- All data relating to development progress is available via the Planning Data Hub, unless stated otherwise.

# Introduction

## Purpose of this document and clarifications

### Data sources and clarifications

#### Jobs



- The LESD is a database that records recently completed employment developments and those in the pipeline in London to produce an estimate of London’s additional employment capacity.
- Since the adoption of the London Plan 2021, a new London Employment Sites Database was produced in 2021. This provides up to date estimates by OA.
- A jobs dashboard has been produced to monitor the jobs’ performance in the OAs.

#### Local Plan status



- Local Plan status information is based on publicly available data, or information received by the boroughs.

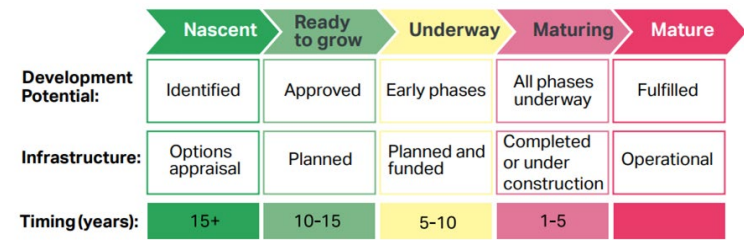
#### OA boundaries

- The London Plan designates OAs, whilst the boundary can be adopted through development plans. See more on [OA boundaries](#).

### OA status - London Plan 2021

- The OA categorisation in the Key info refers to the London Plan 2021 Figure 2.2 - OAPF process diagram, also shown below:

Figure 2.2 - OAPF process diagram



### Additional resources

- Growth Corridors: [Engagement summaries from Planning for London events \(November/December 2024\)](#)
- Opportunity Area monitoring GLA [webpage](#).



# Introduction

## Contents

Context

Key info

Transport  
and  
connectivity

Delivery of  
homes

SHLAA 2017

Site  
allocations

Development  
activity 2021  
and 2024

Jobs

Town Centre  
and High  
Streets

Industrial  
Land

Place  
strategies\*


Moving  
forward

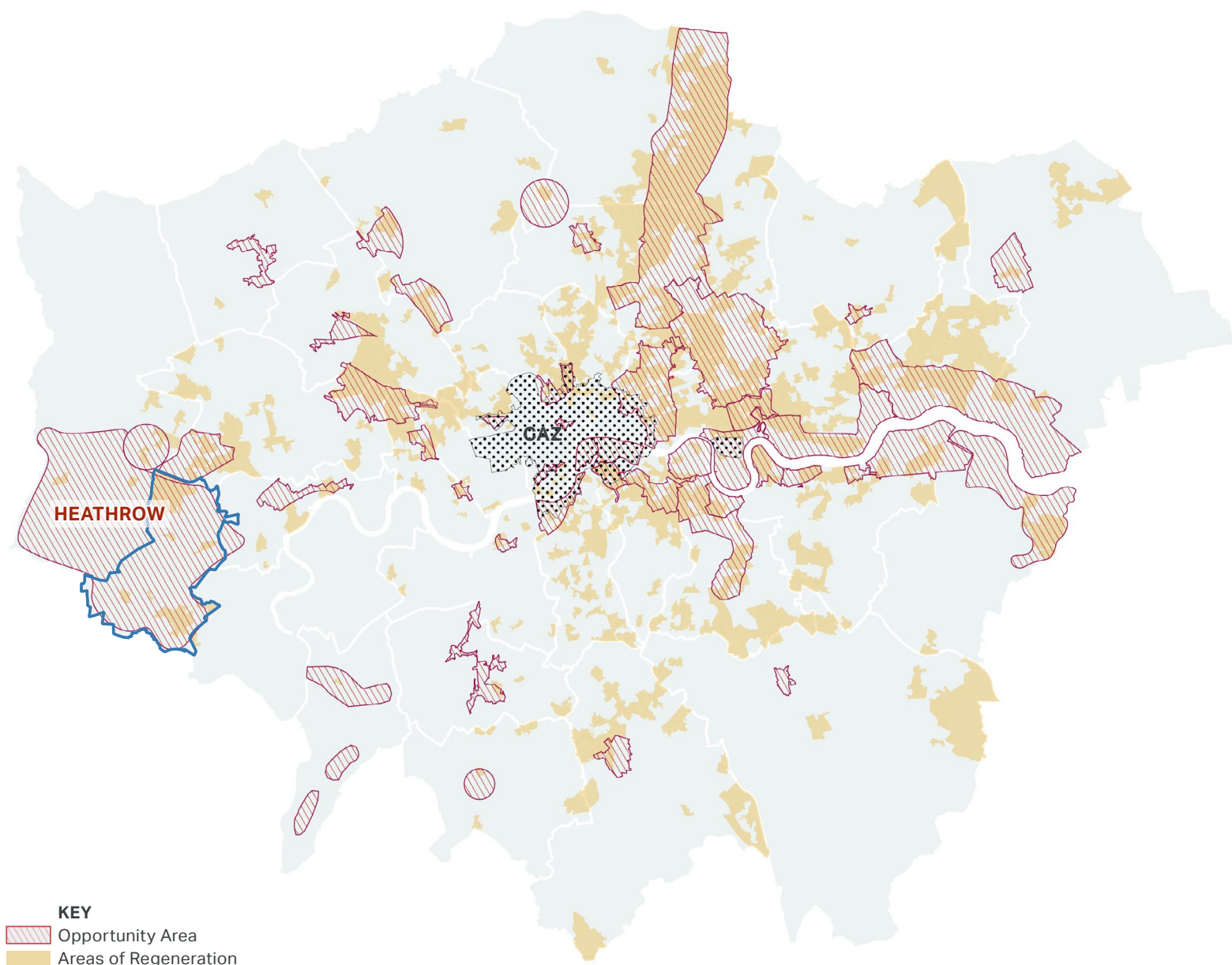
\* This section refers to existing/ emerging strategies for the OA.

# Heathrow

## Context

- This report shows an indicative boundary for Heathrow OA, based on the monitoring boundary that has been used since 2019.
- Both boroughs are working on identifying a workable boundary for this OA:

-  There is an **emerging boundary** for the OA in the Hounslow part (Draft Local Plan Regulation 19).
- LB Hillingdon is at earlier stages of their Local Plan review. Responding to the draft OA pen portrait they suggested an indicative boundary. The borough suggests that Heathrow could be identified as an **'Activity Zone'**, rather than an OA.



Source: Areas of Regeneration as per London Plan 2021

# Heathrow Context

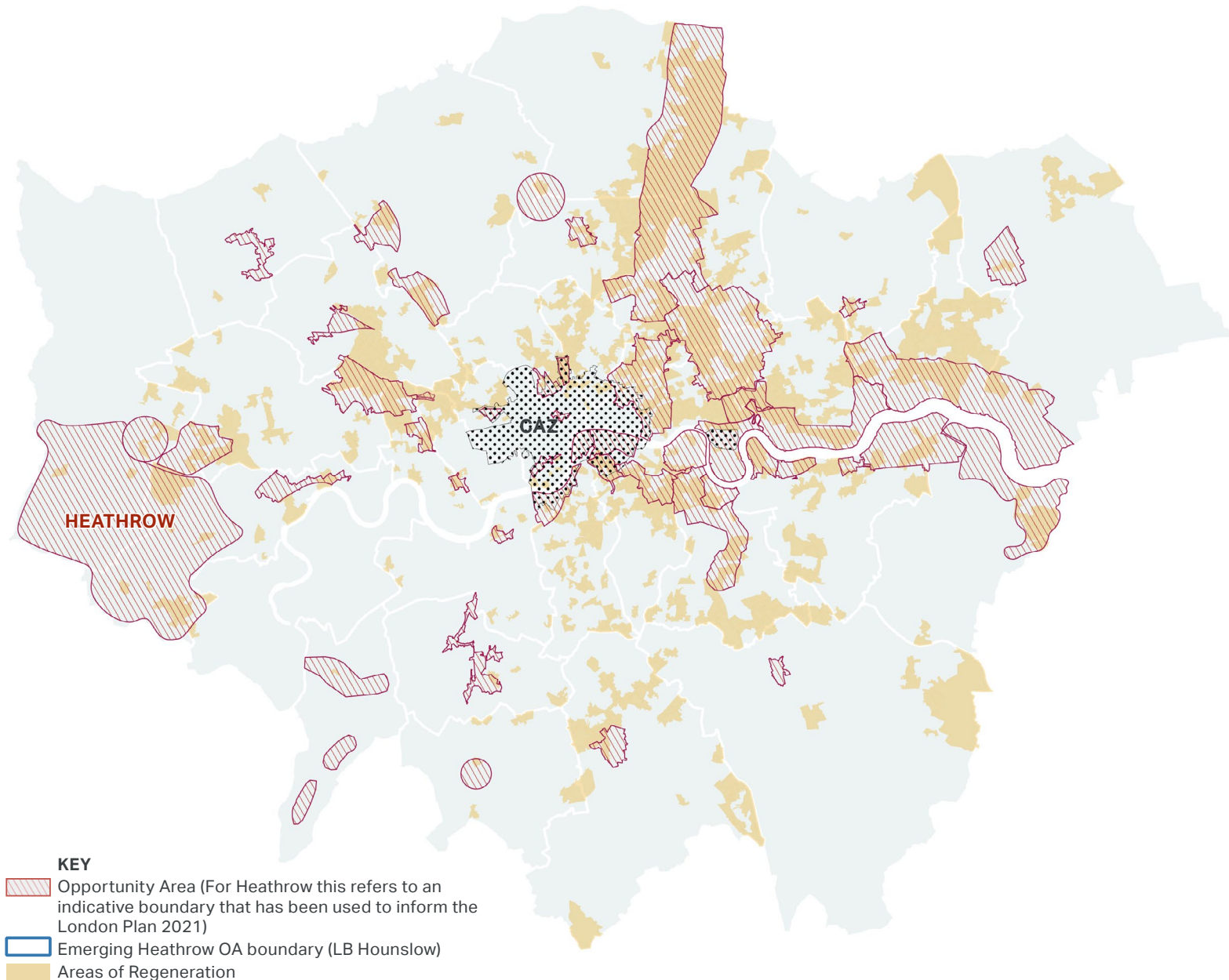
## OAs in the CAZ

- King's Cross (Maturing)
- Tottenham Court Road (Maturing)
- Victoria (Maturing)
- Waterloo (Maturing)
- London Bridge/ Bankside (Maturing)
- Euston (Ready to Grow)
- VNEB (Underway)
- Elephant & Castle (Underway)
- Part of City Fringe/ Tech City (Underway)
- Paddington (Underway)

The OA is not within the CAZ.

## Areas of Regeneration

Parts of Hounslow that are within the OA are identified as areas of regeneration.

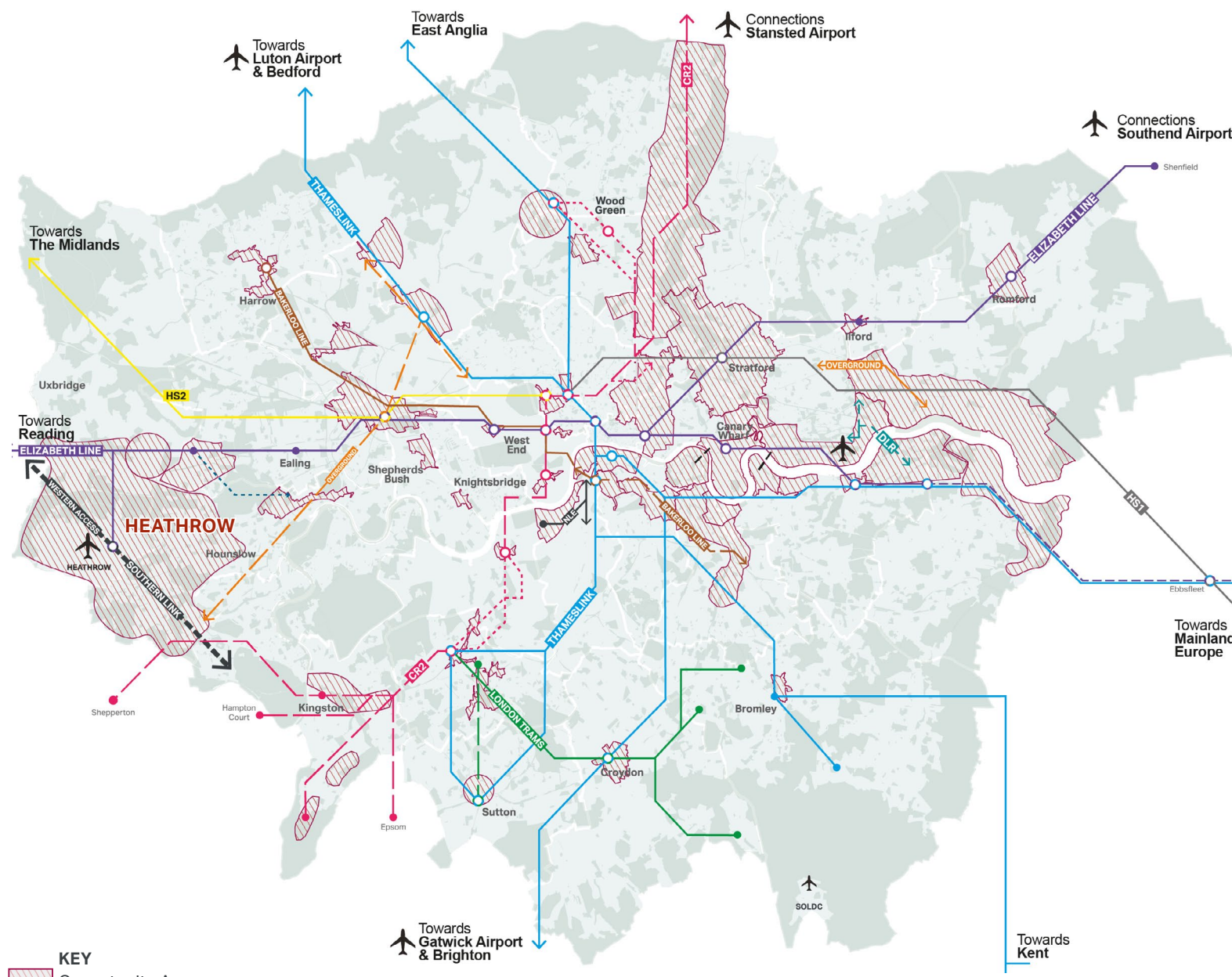




# Heathrow Context

## Transport and Growth Corridors

- Elizabeth Line
- West London Orbital (Hounslow)
- Southern Link



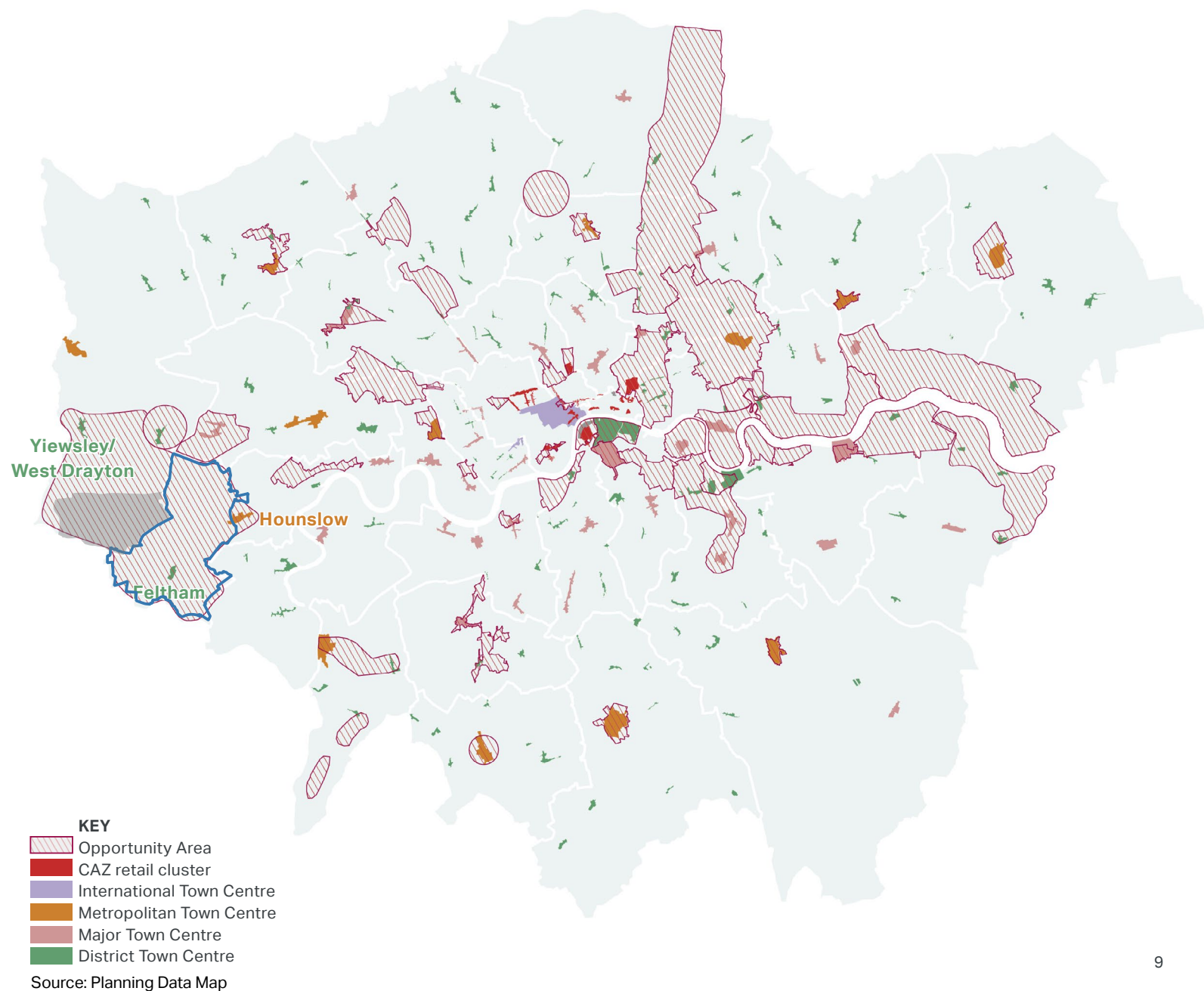
**KEY**  
Opportunity Area  
Designated Open Space  
Source: Planning Data Map

# Heathrow Context

## OAs and Metropolitan Town Centres

- Olympic Legacy (Maturing)
- Harrow & Wealdstone (Underway)
- **Heathrow (Hounslow) (Underway)**
- Croydon (Ready to grow)
- Romford (Ready to grow)
- Ilford (Ready to grow)
- Wood Green (Nascent)
- Kingston (Nascent)
- Bromley (Nascent)
- Sutton (Nascent)

The OA indicative boundary that was used to inform the London Plan 2021 contains **Hounslow Metropolitan Town Centre, Feltham District Town Centre** and **Yiewsley/ West Drayton District Town Centre**. It is noted that the emerging Heathrow OA boundary in LB Hounslow draft local plan.





# Heathrow

## Key info

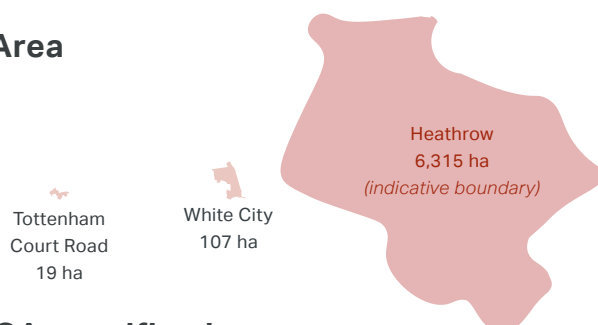
### London Plan Designation Year

2004 2008 2011 2016 2021

### Borough

LB Hounslow, LB Hillingdon

### Area



### OA specific plans

Not started

### Local Plan status

LB Hillingdon (Reg.18), LB Hounslow (Reg.19)

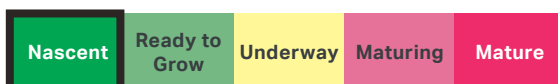
### Growth Corridor

Heathrow/ Elizabeth Line West  
West London Orbital

### Housing Delivery Test 2023

None

### OA status (London Plan 2021)

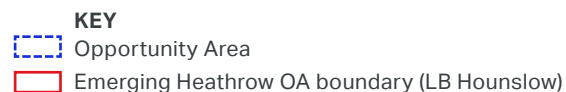


London Plan 2021 capacities by 2041



Source: Google Earth

\*Note that the LESD (2021) decreased the capacity to 6,200 new jobs by 2041.

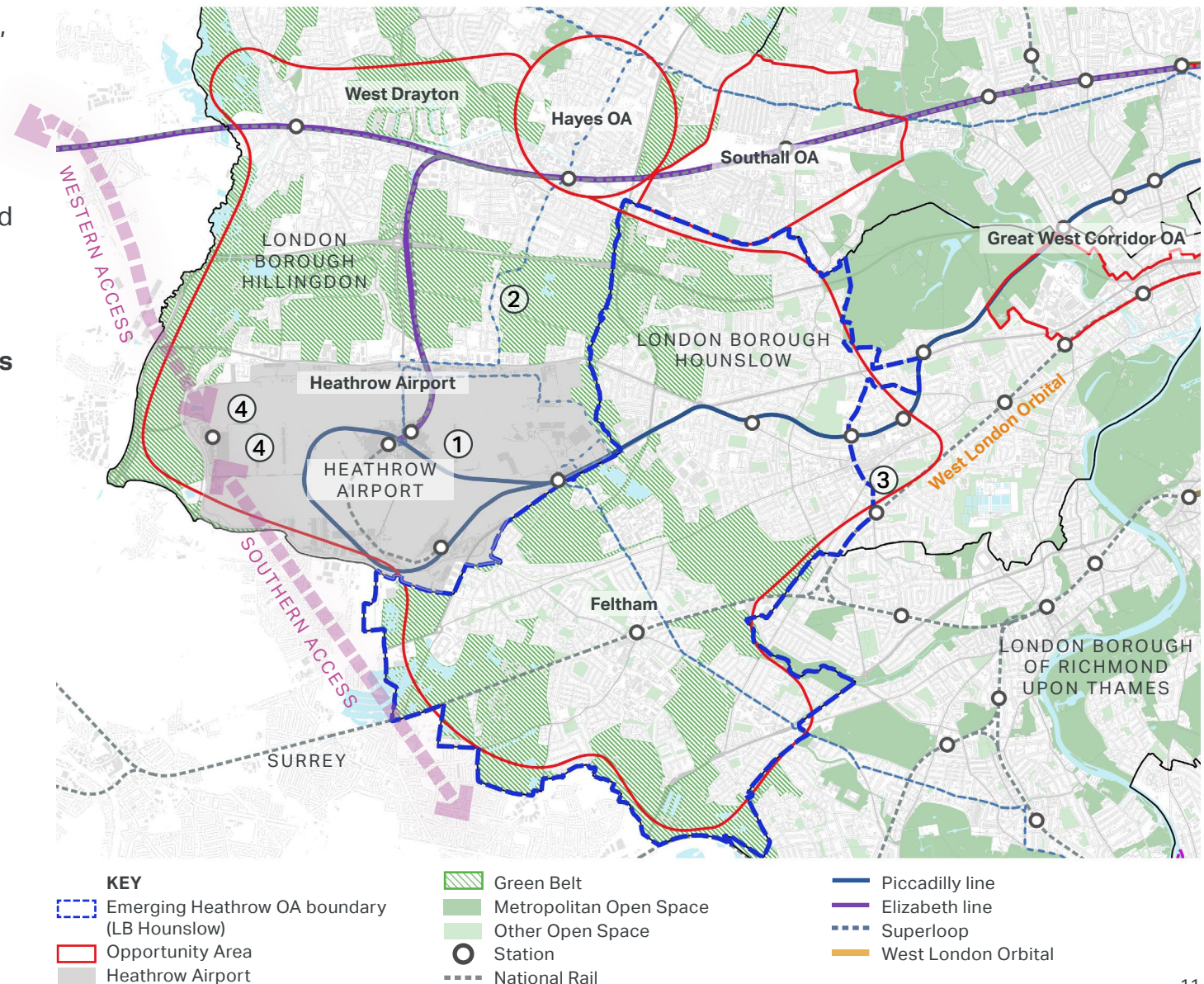




# Heathrow

## Transport and connectivity

- ① **Well - connected OA:** Elizabeth Line, Piccadilly, National Rail.
- ② **Superloop** now going through the OA: SL8 Uxbridge to Heathrow.
- ③ **West London Orbital:** Vision Corridor and growth potential around stations (Hounslow; opportunity for sites that were previously excluded to come forward).
- ④ Potential **Heathrow southern access** transport connection.





# Heathrow

## Delivery of homes

### Delivery pre-2019

Completions since designation against capacity

LP 2004 **930**

LP 2008 **10,750**

LP 2016 **9,000**

Completed **7,000**

Changes in capacity reflect changes in the boundary throughout the years.

### Delivery post - 2019 (London Plan 2021)

Progress against 22yr, 10 yr capacity

22 yr **13,000**

10 yr **9,984**

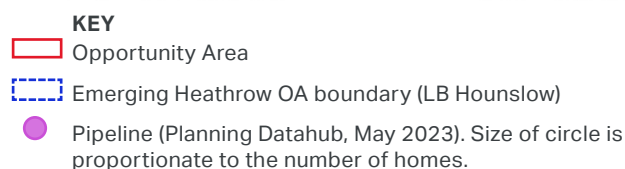
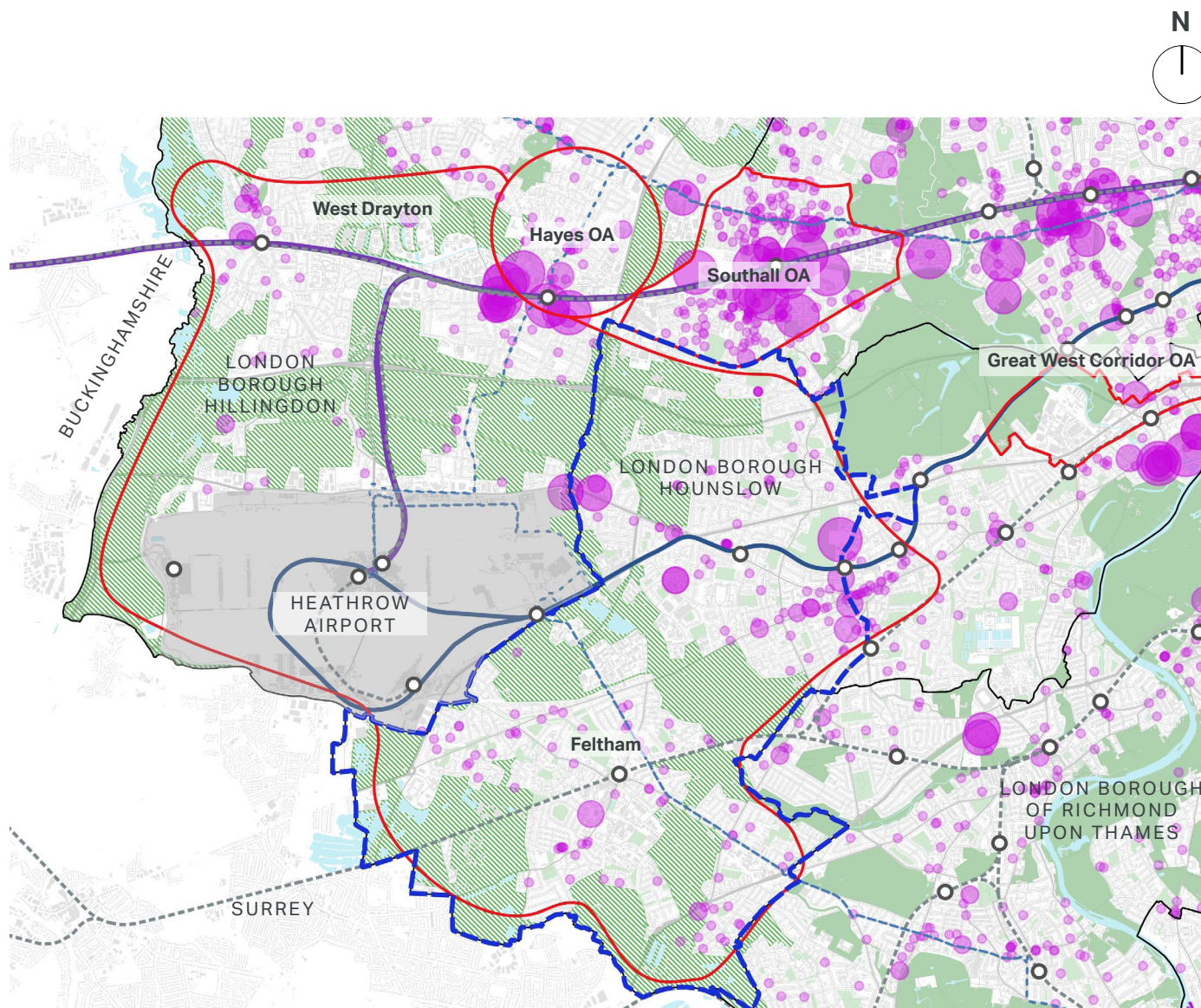
Completed **3,984**

Pipeline **2,811**

The OA is delivering at a rate of 796 homes/year, against the indicative rate of 590 homes/year. The completions and the current pipeline account for 70% of the 10 year homes capacity.

#### Notes

- The Heathrow OA indicative boundary (LPP 2021) was used to monitor completions in the OA
- [Completions](#) account for all types of supply between 2019/2020 to 2023/2024.
- [Residential Pipeline in 2023/2024](#)



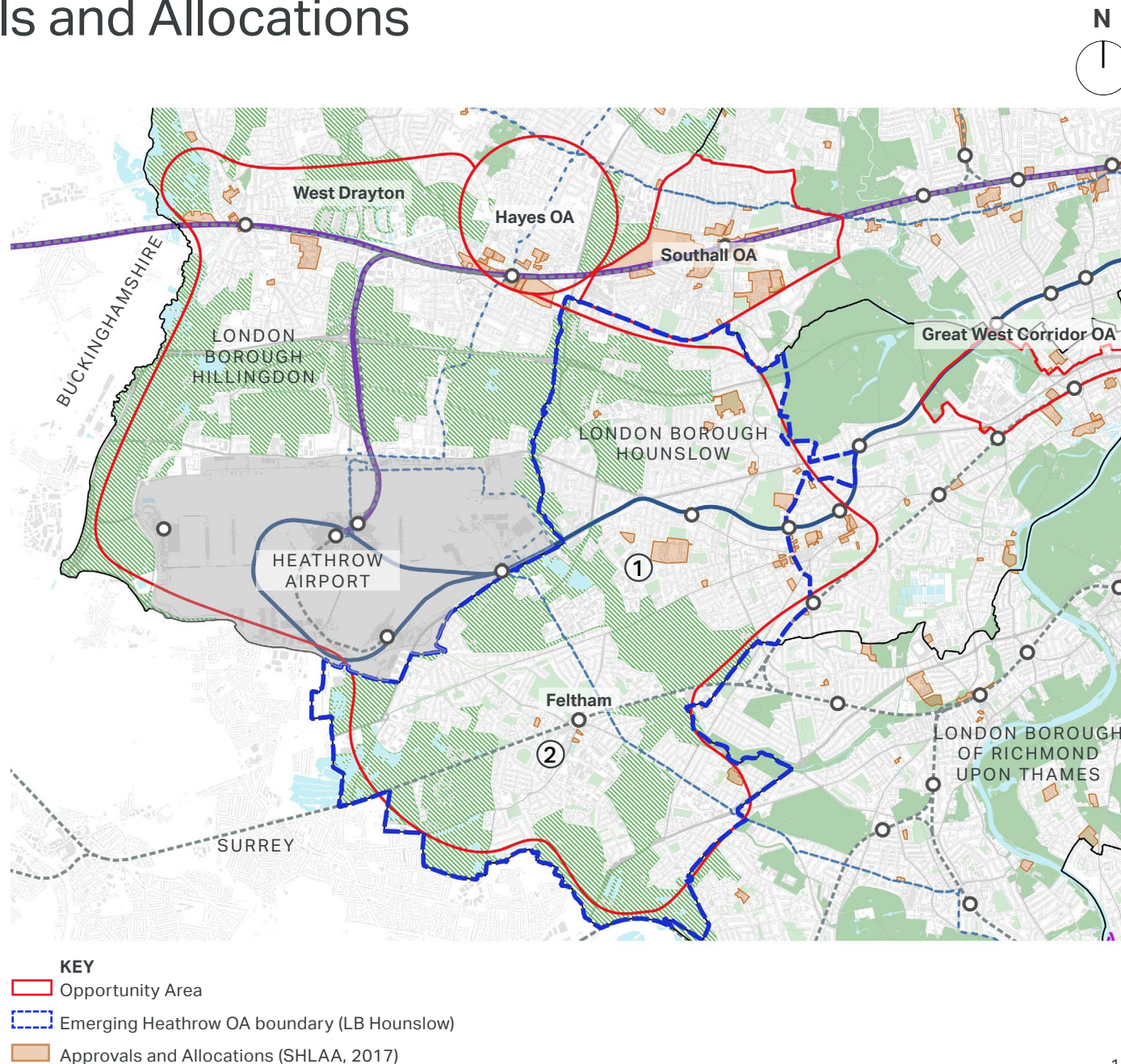
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# Heathrow

## SHLAA 2017: Approvals and Allocations

- ① Key sites include Hounslow Cavalry Barracks which was permitted in 2023 and not implemented (more than 1,500 new homes, with 35% affordable).
- ② Not many sites identified in Feltham Town Centre in the SHLAA 2017.

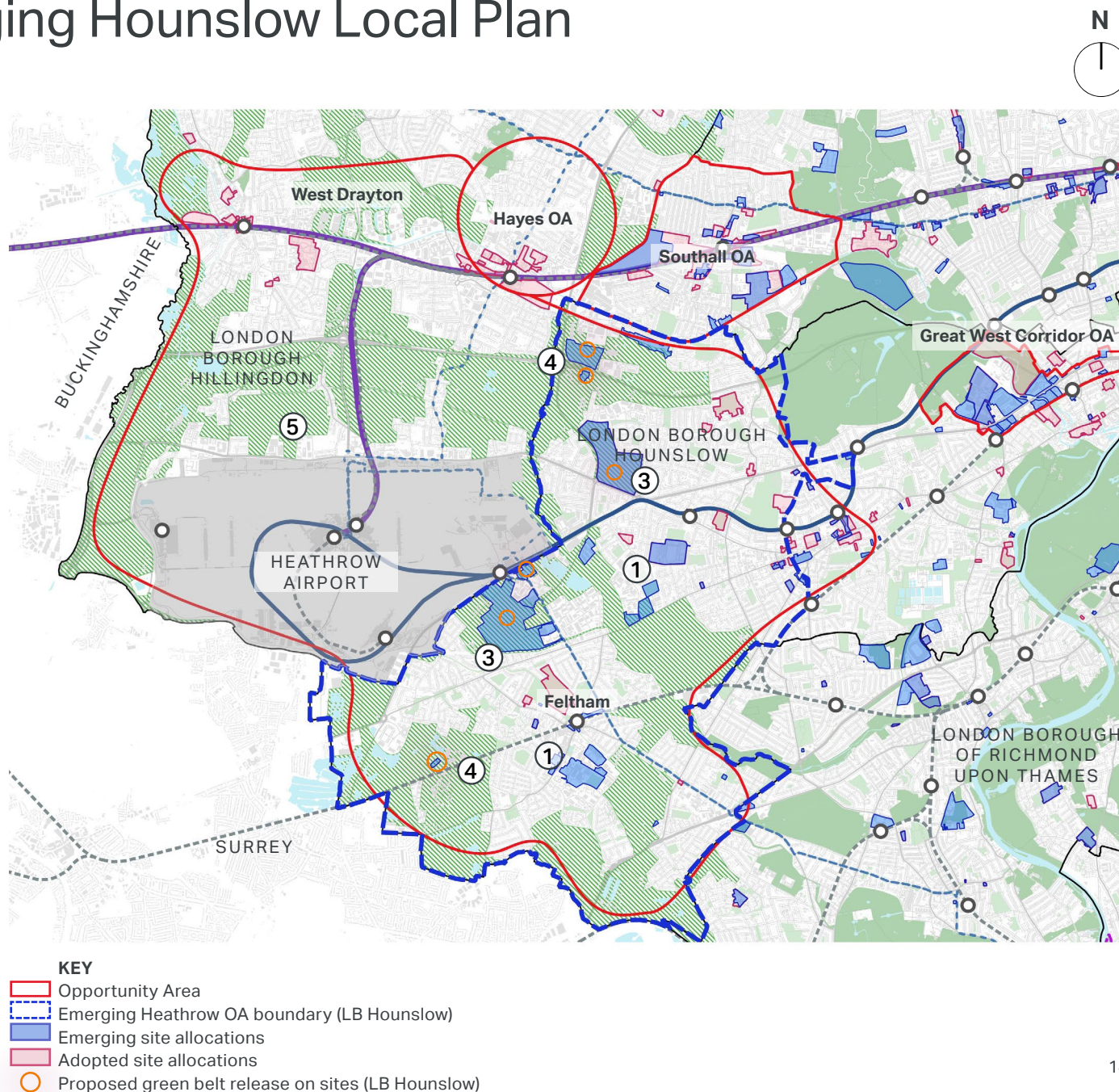




# Heathrow

## Site allocations: Emerging Hounslow Local Plan

- ① Overall it seems that more sites are allocated in Feltham Town Centre.
- ② A cluster of sites allocated for industrial uses.
- ③ Additional large sites (57, 122) are identified as sites for industrial/employment uses and parkland restoration.
- ④ Proposed Green Belt release by LB Hounslow.
- ⑤ No emerging sites are shown in the Hillingdon side as the borough is in the process of calling for sites for the new local plan.



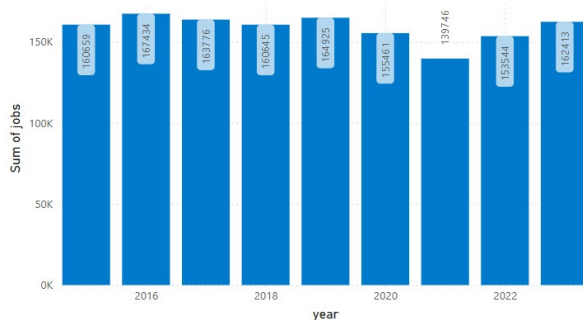


# Heathrow

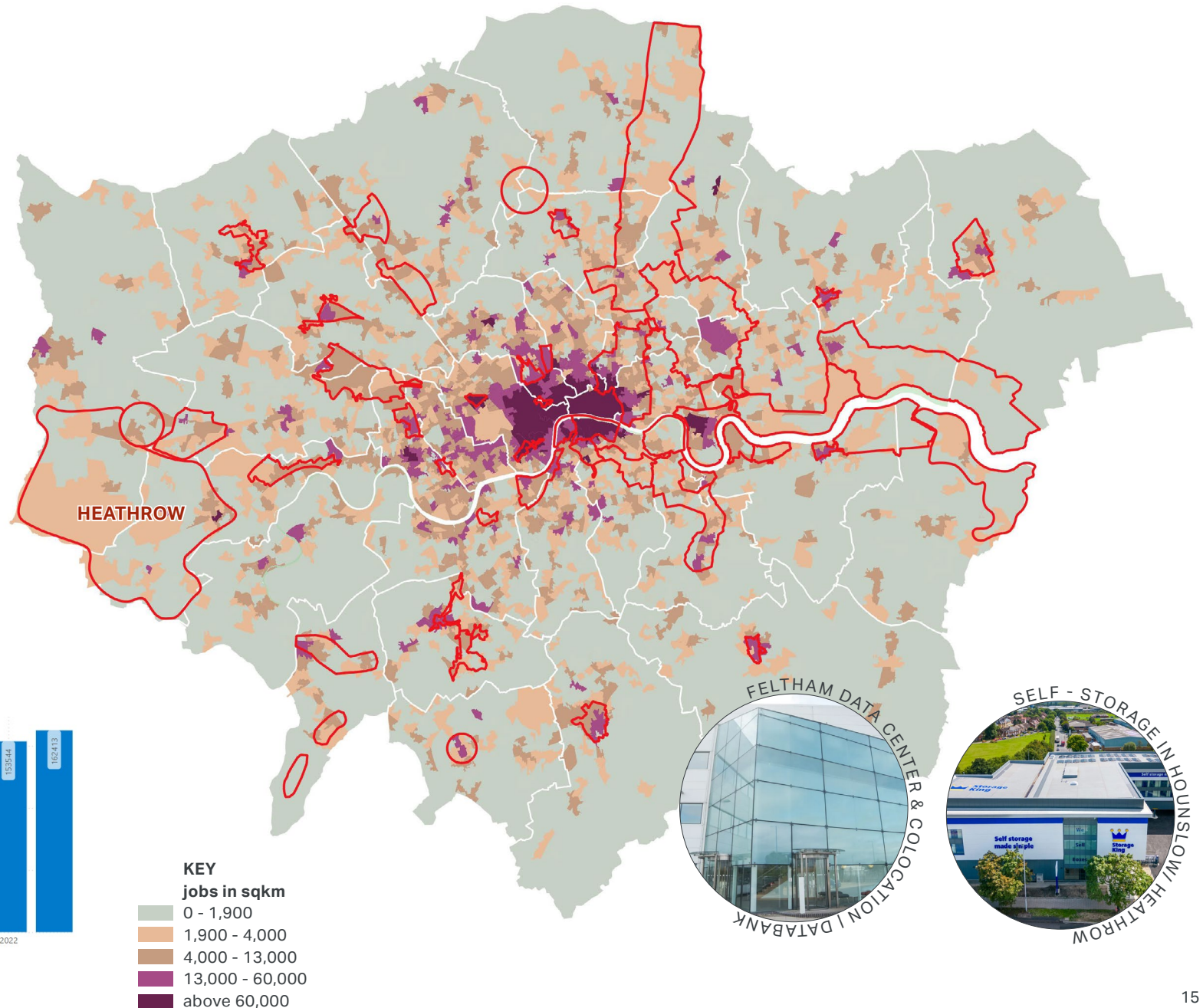
## Jobs: Overview

- In 2023,, there were 163,000 jobs in the OA, placing it 3rd across all London's OAs in terms of jobs.
- High presence of data centres, logistics and storage facilities - low jobs density.
- Large OA with heterogeneous types of employment; from transport storage to town centre uses.
- Leading OA in jobs in transport and storage (significant increase).
- Creative Industries (film) located in West Drayton/ Hayes.

Jobs by year in the OA



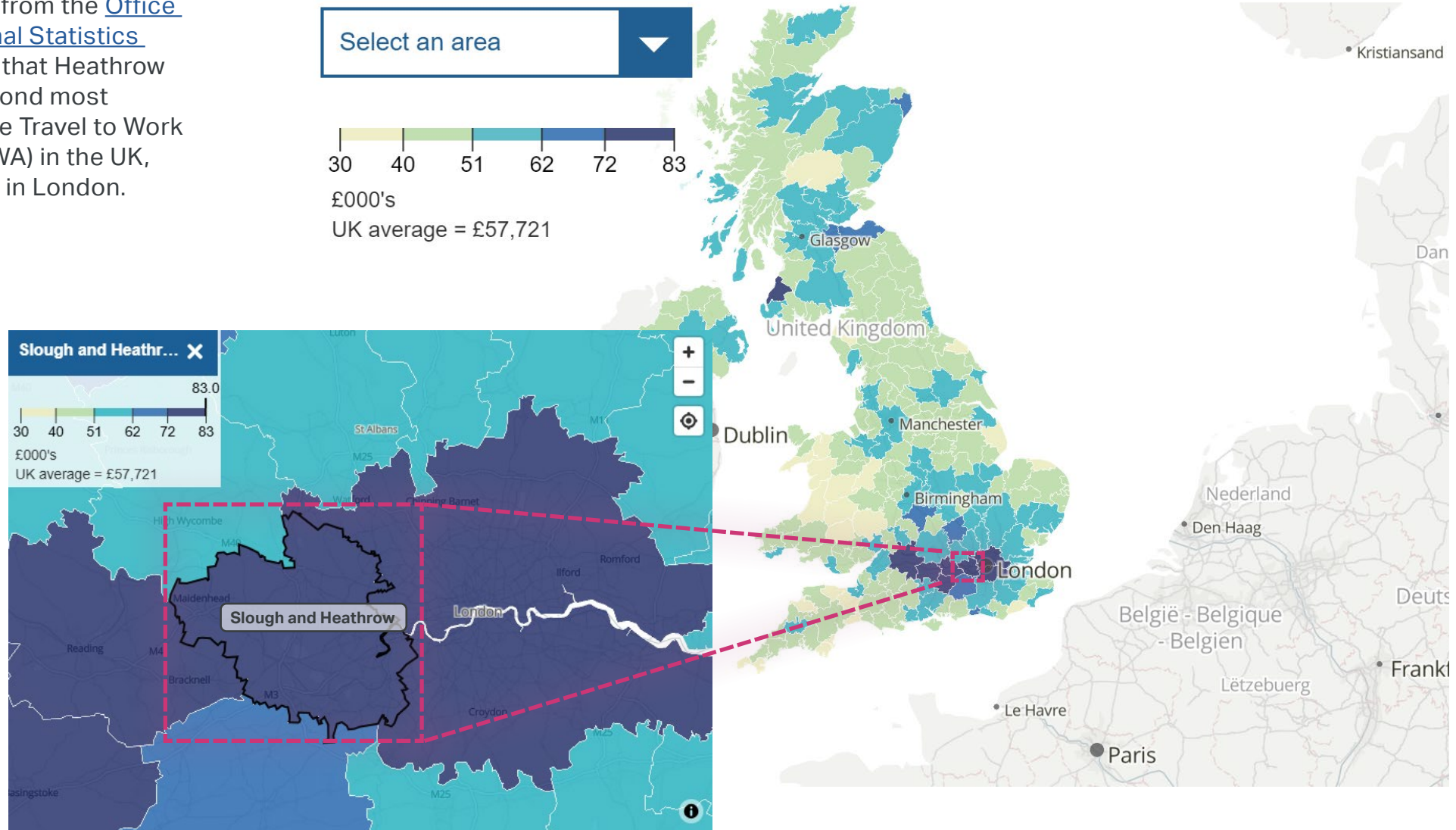
Source: Census, Business Register



# Heathrow

## Jobs: Travel to Work Area (TTWA)

- Evidence from the [Office for National Statistics](#) suggests that Heathrow is the second most productive Travel to Work Area (TTWA) in the UK, after CAZ in London.





# Heathrow

## Town Centres and High Streets



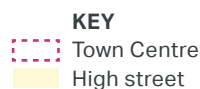
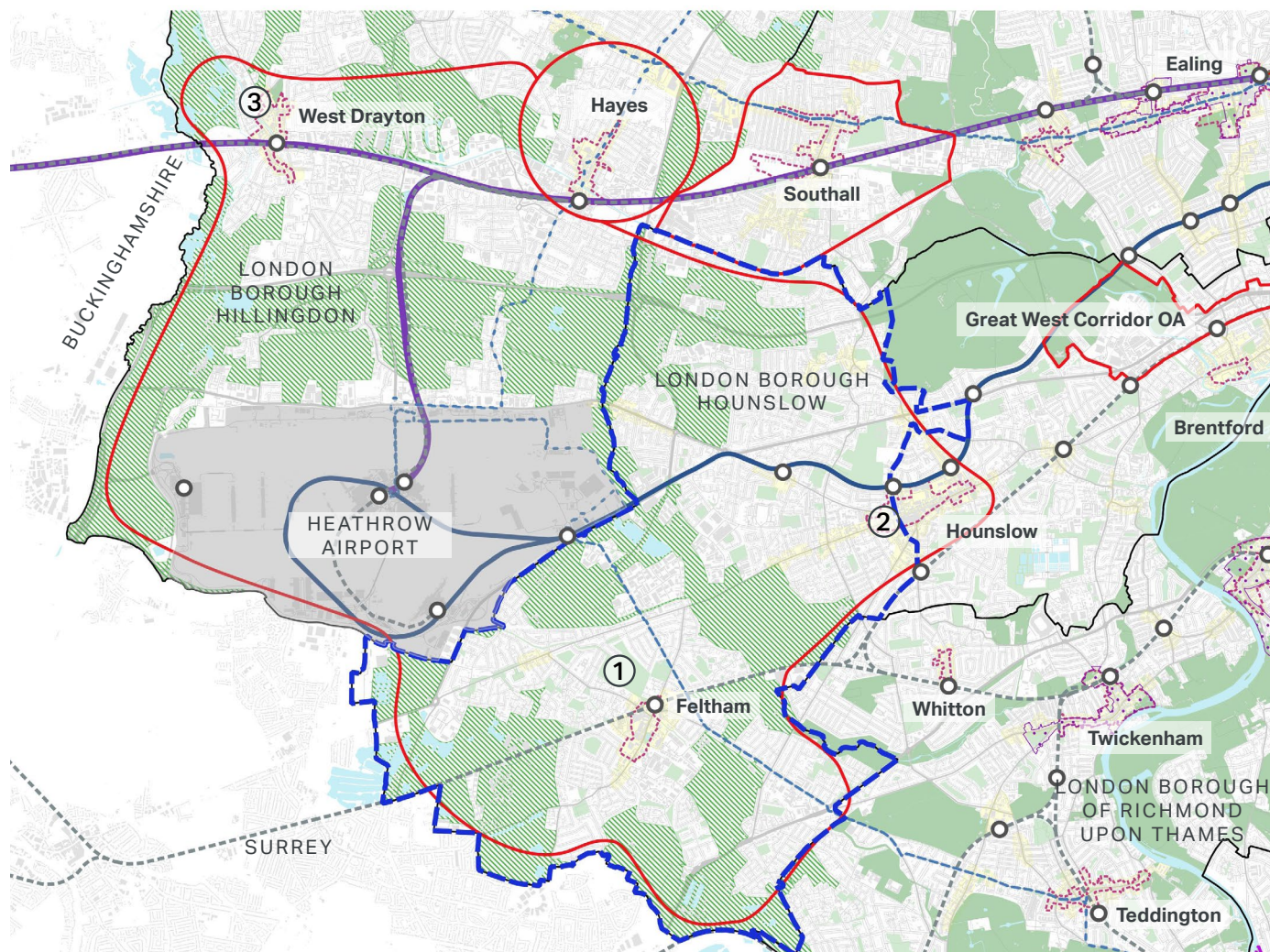
### ① Feltham

- The GLA have granted LB Hounslow £40,000 from DLUHC's Levelling Up Capacity Support Funding, to provide Area Masterplanning support on Feltham Town Centre
- This funding will support LB Hounslow to update the Feltham Town Centre Masterplan (adopted in 2017), focusing on delivery and urban design principles to support the high street and wider public realm connectivity, industrial and employment space and mixed-use development.

### ② Hounslow *(outside the proposed Heathrow boundary in LB Hounslow draft local plan)*

- Hounslow Town Centre Masterplan approved in March 2024.
- Guidance on improvements and key moves for strategic sites.
- Civic and cultural presence is a strength of the town centre.

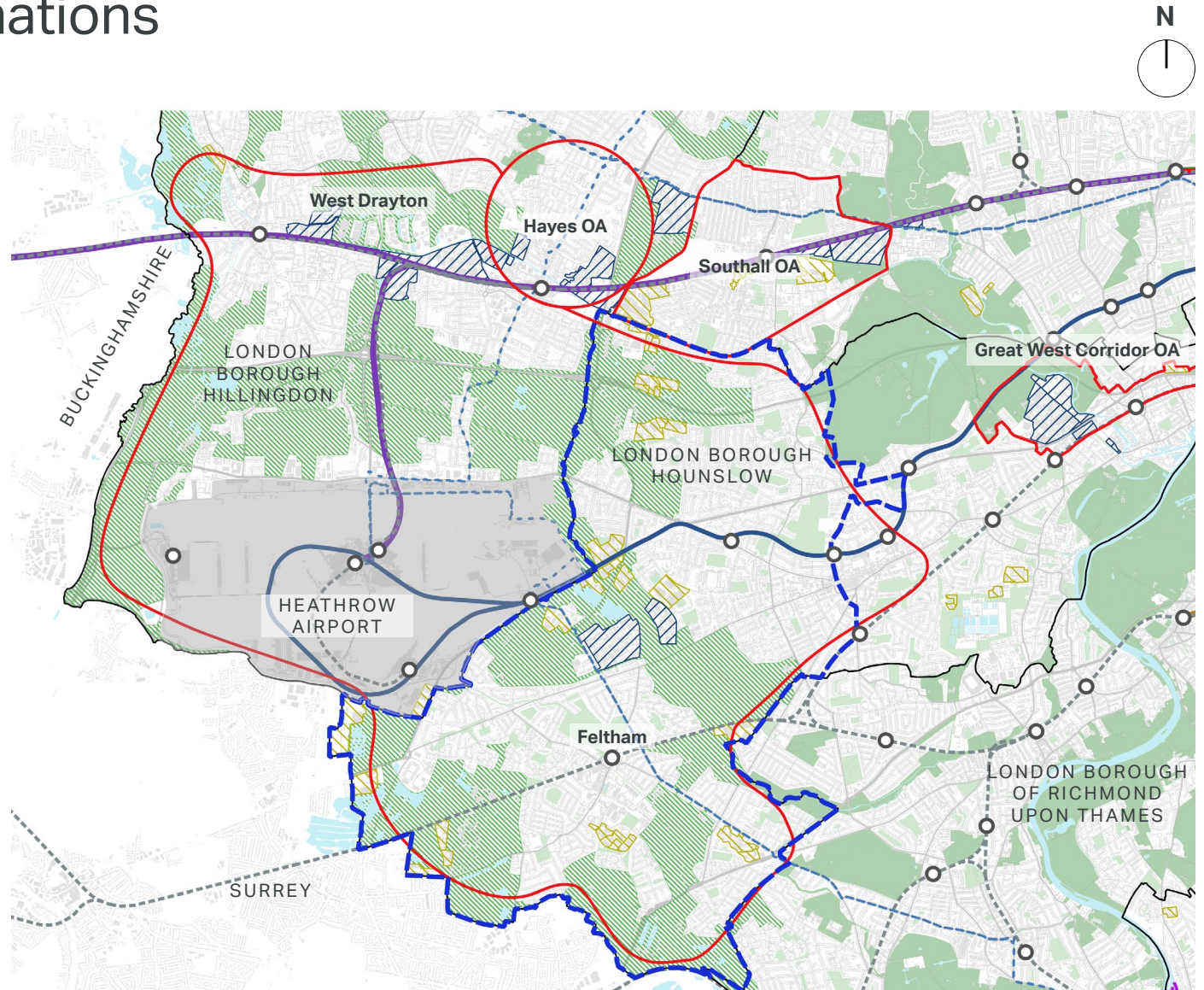
### ③ West Drayton





# Heathrow

## Industrial Land: Designations



Source: [London Industrial Supply Study 2023](#)

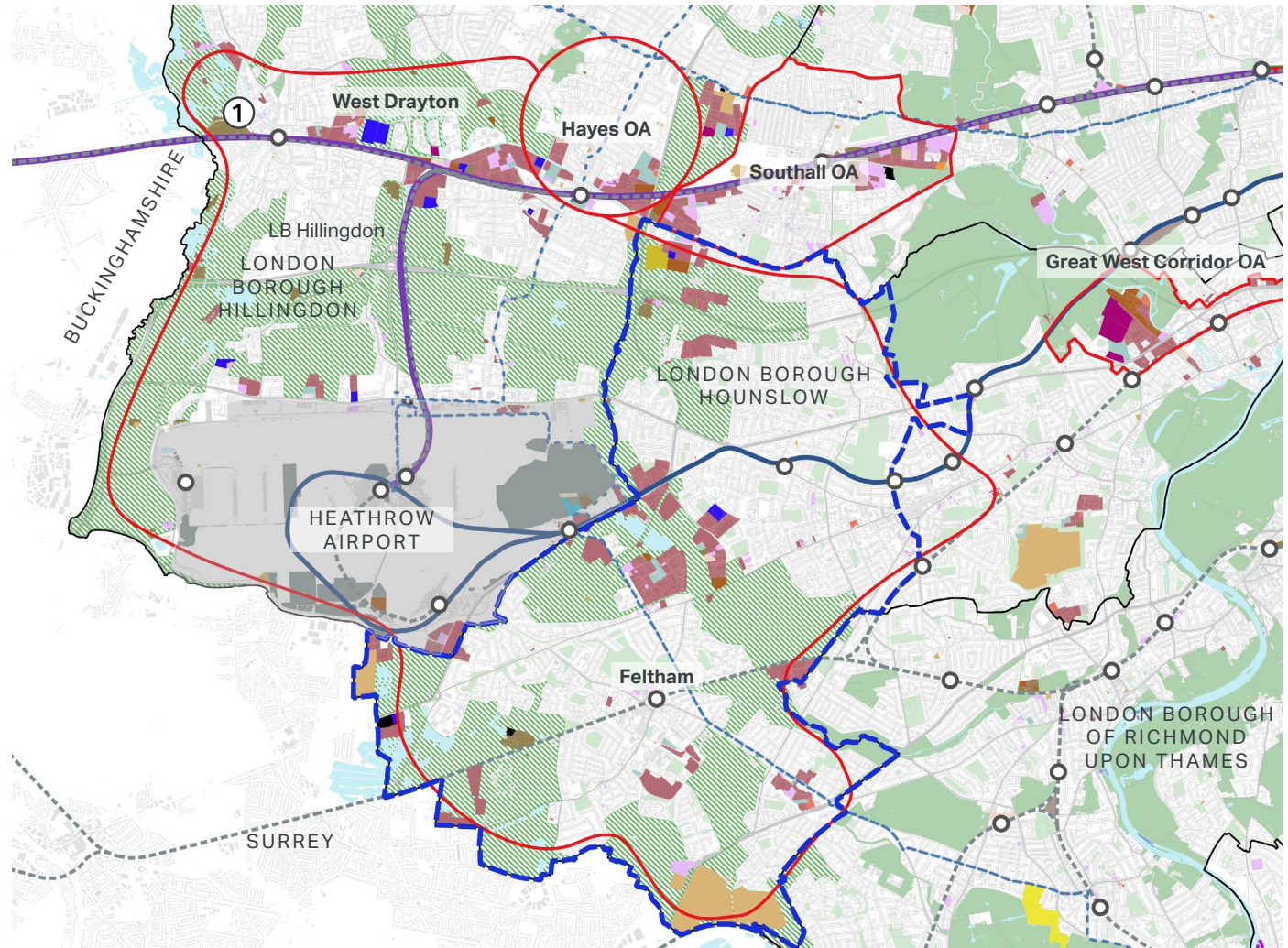
**KEY**  
SIL  
LSIS



# Heathrow

## Industrial Land: Types of Industry

① Elizabeth Line corridor/ M4

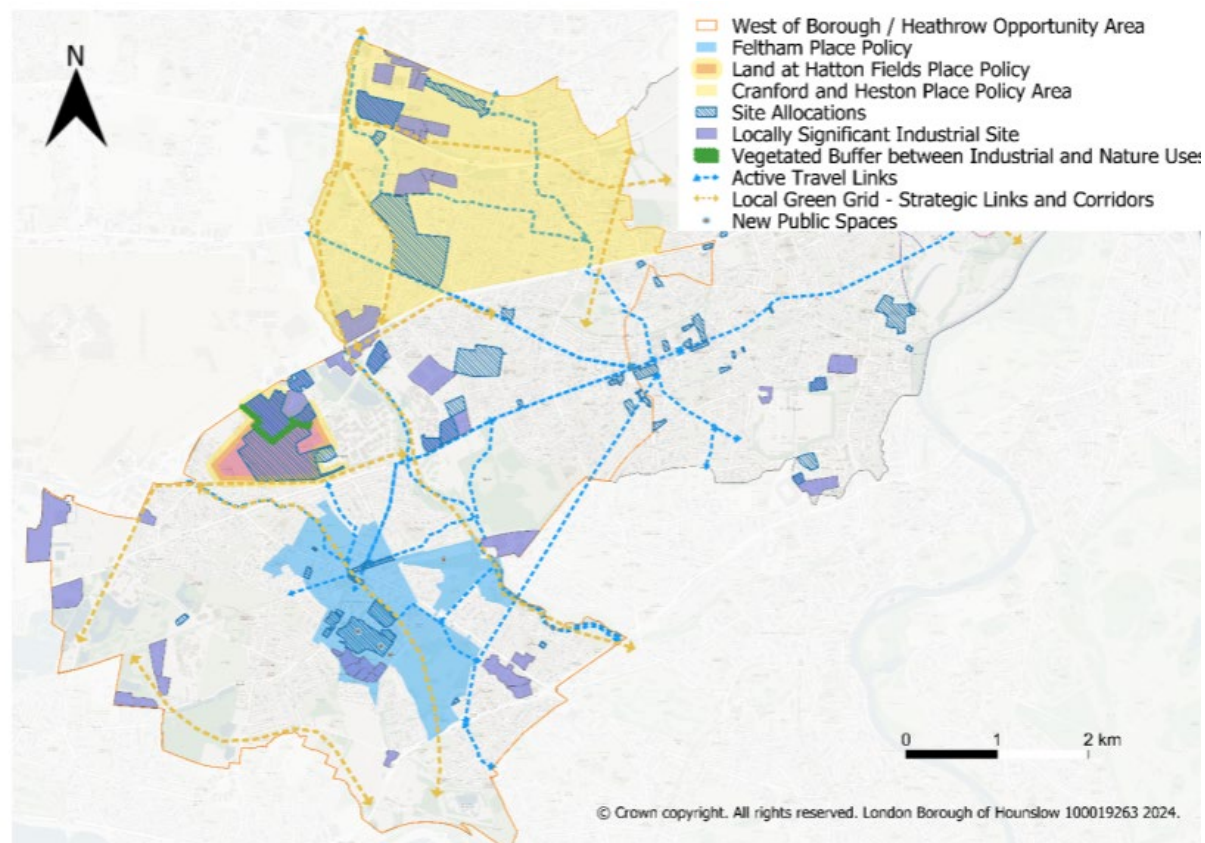


Source: [London Industrial Supply Study 2023](#)

# Heathrow

## Place strategies: Hounslow Draft Local Plan (2024)

- As part of the Reg.19 Hounslow developed Policy P2: West of the Borough, which is located within the Heathrow Opportunity Area.
- The draft plan shows an OA boundary (in orange dashed line). The proposed OA boundary does not include Hounslow TC, as the OA focuses on the regeneration of Feltham and expansion of employment development in the Heathrow area.
- The draft plans states that over the plan period, at least 6,500 new homes will be delivered in the part of the OA.
- The policy highlights the following areas:
  - **Housing:** The Borough and we will continue to explore opportunities to further increase the level of housing delivery.
  - **Economy:** The Council will secure a strong economy and create the conditions for economic growth in the West of Borough by increasing the provision of employment and commercial sites and by supporting the retention, enhancement, and intensification of existing employment and commercial uses.
  - **Green Belt:** his will include selective and limited releases of Green Belt land to help meet the borough's need for new industrial floorspace.



Policy for West of Borough. Source: [Hounslow Draft Local Plan](#)



# Heathrow

## Moving forward

### Purpose of the OA

- The current OA has existed since the first iteration of the London Plan. It was original linked to the opportunities along the now Elizabeth Line leading out to Heathrow, but has since been expanded to include large parts of both Hillingdon and Hounslow.
- The current OA designation does not appear to be linked to any specific development proposals of scale or the introduction of significant new **infrastructure**.

### Heathrow Activity Zone

- **Potential for an alternative approach** that continues to recognise the influence of the airport, but is not inherently tied to housing and employment growth.
- Hillingdon would like to work with the GLA and Hounslow to explore the creation of a **Heathrow Activity Zone**, similar to Central Activity Zone. This would reflect the more general influence of Heathrow on the wider area, which is not just growth-related and could allow for tailored policies that cater for a Heathrow-influenced economy and environment.
- This zone could be a vehicle allowing for a focus on **Heathrow supply chain business activity, sustainable travel across the region** (both logistics and private travel), **surface access improvements, optimise brownfield land for development, better job brokerage and opportunities**.
- This approach should link to London's Growth Plan and the economic visions developed for key places in West London, like OPDC. The Mayor's Growth Plan refers to the West Tech

### Proposition

- Potential for an alternative approach that could replace the OA designation. Specific purpose and boundary review with the boroughs.
- Green belt release impact.

Corridor, which is anchored in White City, and going north and west through Old Oak and Park Royal and towards Heathrow and Hillingdon, with HS2 at Old Oak Common opening up new economic opportunity.

### OA boundary

- **The boundary needs to be reviewed to better reflect the place opportunities and the purpose of the OA**, i.e. on the Hounslow side, the town centre could be removed, as suggested in the Regulation 19 of the draft local plan.

### Infrastructure

- There is also a need to explore options for a new Northern access to the airport similar to southern and western access proposals. Super loop does not provide adequate bus connections between Heathrow and Uxbridge.
- The OA sits within the West London area currently affected by electricity capacity constraints. There is scope for early engagement with the electrical distribution and transmission networks to better align investment programmes with the development timelines. Heathrow Airport is a major energy user within the OA and operates its own private electricity network within its site.