

Opportunity Area Portrait

Tottenham Court Road



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.

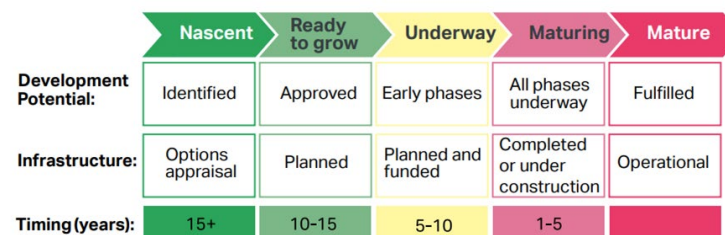
OA boundaries

- 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

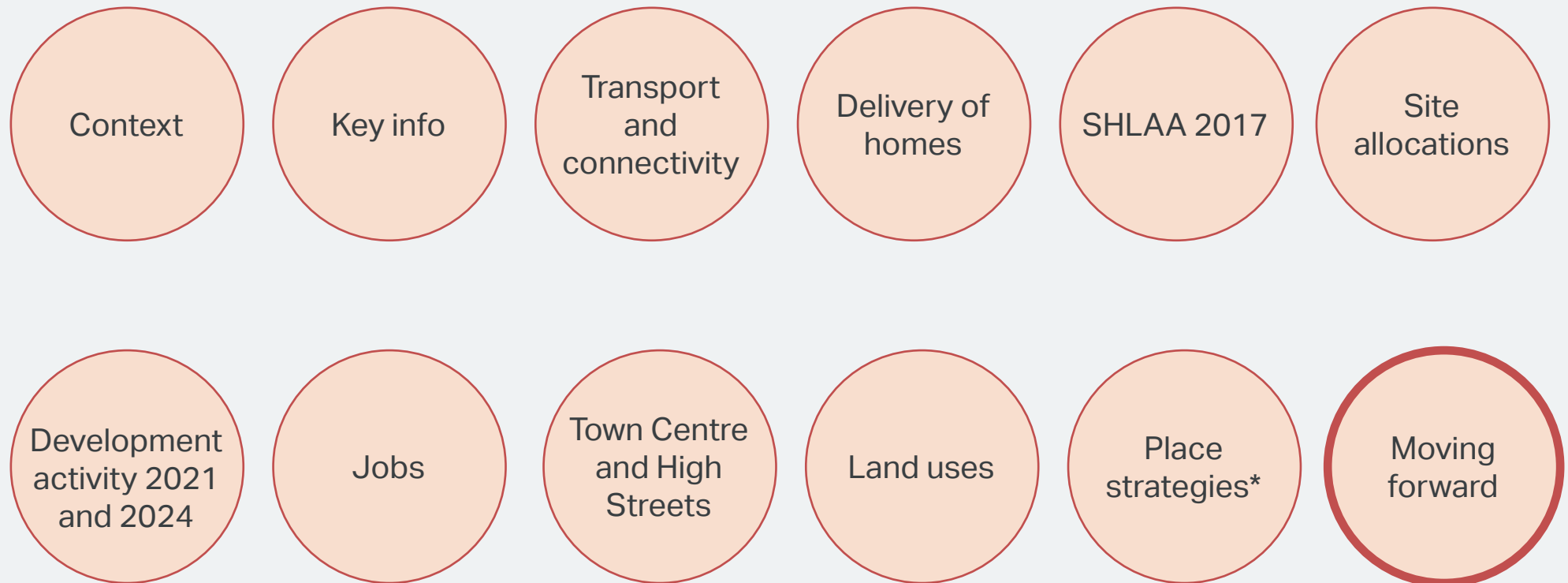


Additional resources

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

Introduction

Contents



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

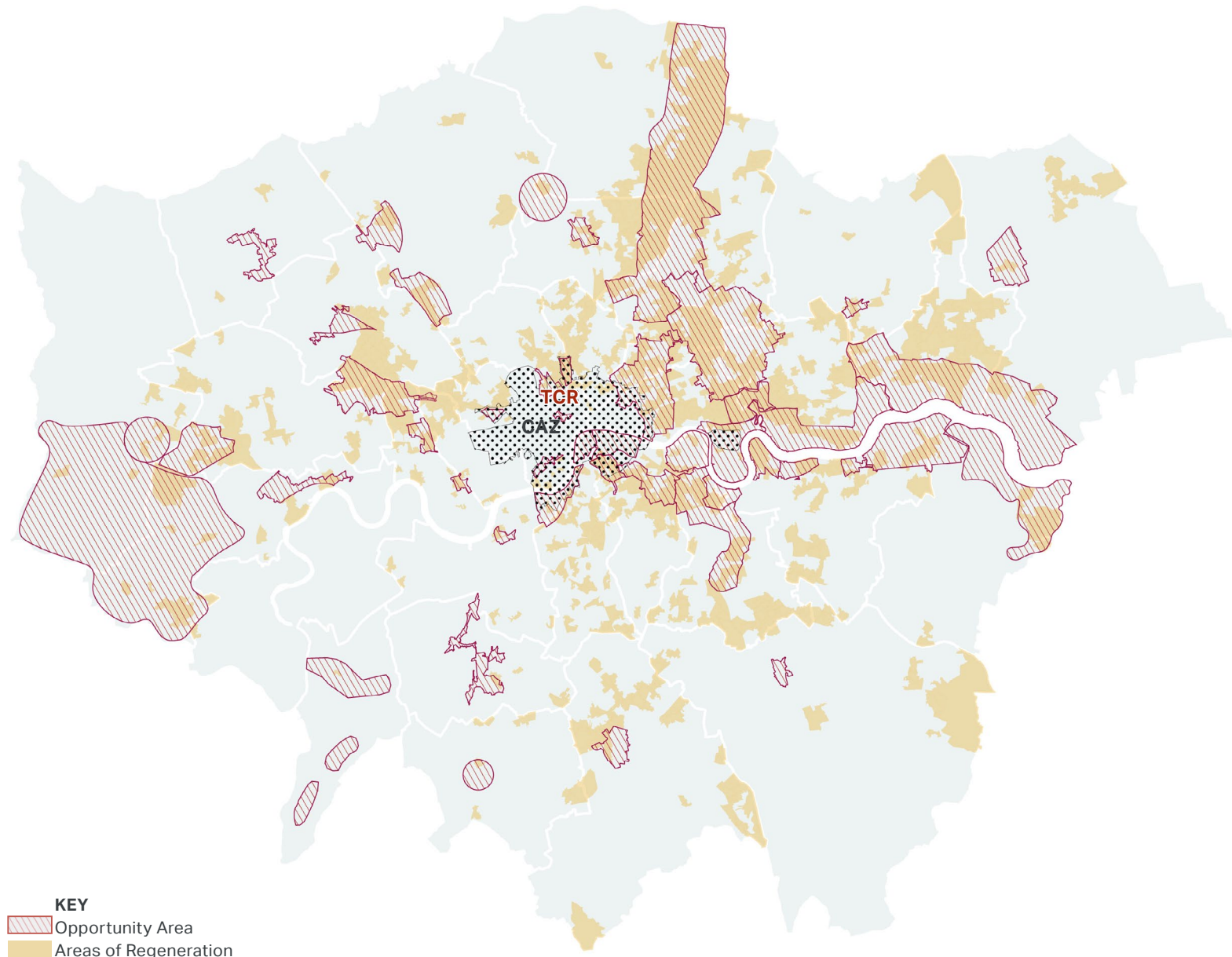
Tottenham Court Road Context

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)

Areas of Regeneration

N/A

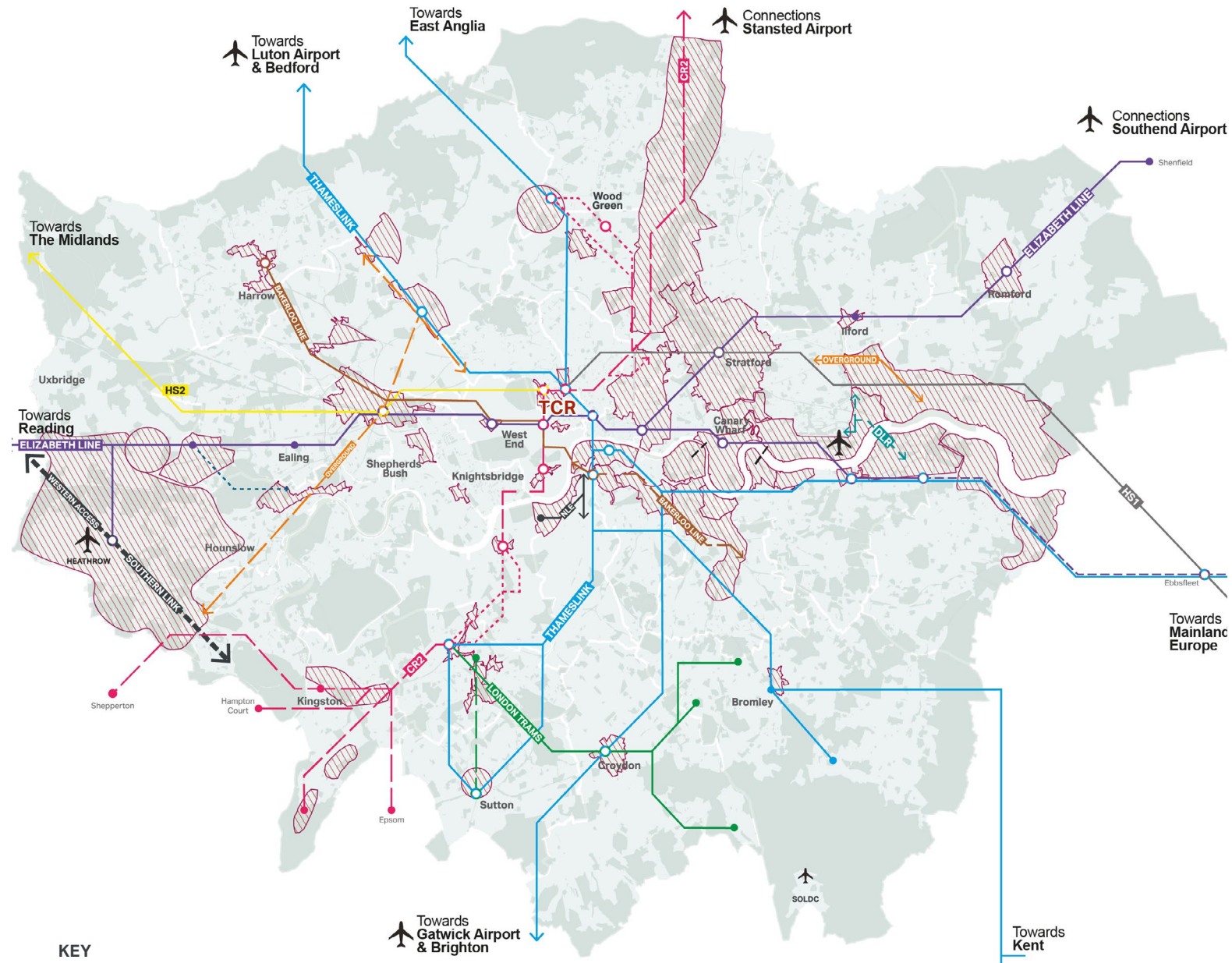


Source: Areas of Regeneration as per London Plan 2021

Tottenham Court Road Context

Transport and Growth Corridors

- The OA sits within the Elizabeth Line corridor.
- TfL in 2024 reported TCR as the busiest station on the line, followed by Liverpool Street.



KEY
 Opportunity Area
 Designated Open Space

Source: Planning Data Map

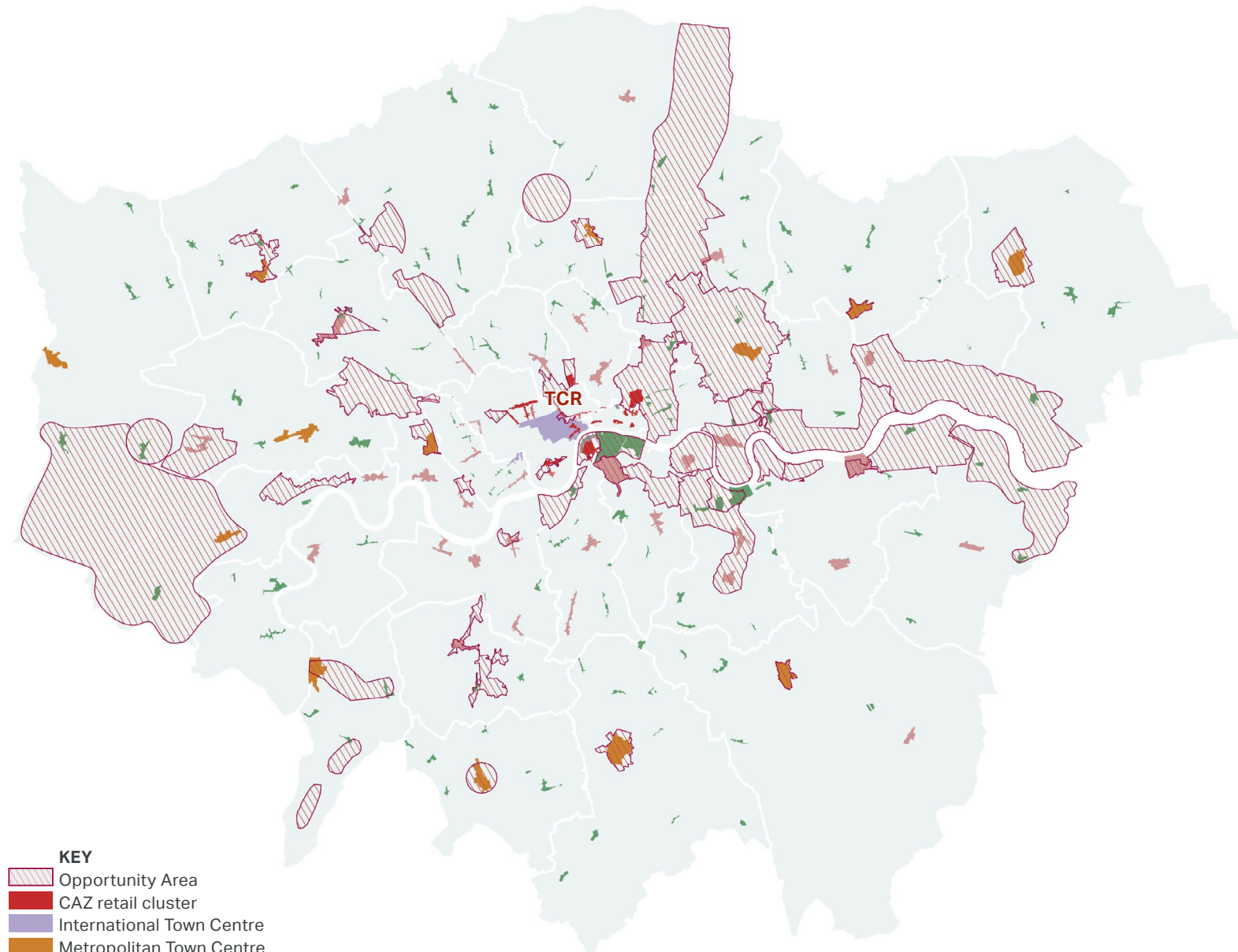
Tottenham Court Road

Context

OAs and Metropolitan Town Centres

- Olympic Legacy (Maturing)
- Harrow & Wealdstone (Underway)
- White City (Underway)
- Croydon (Ready to grow)
- Romford (Ready to grow)
- Ilford (Ready to grow)
- Wood Green (Nascent)
- Kingston (Nascent)
- Bromley (Nascent)
- Sutton (Nascent)
- Paddington (Underway)

Part of the West End International Town Centre is within the OA and Charing Cross Road (CAZ Retail Cluster).



KEY

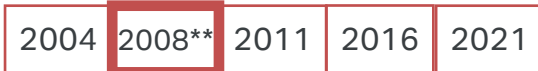
- Opportunity Area
- CAZ retail cluster
- International Town Centre
- Metropolitan Town Centre
- Major Town Centre
- District Town Centre

Source: Planning Data Map

Tottenham Court Road

Key info

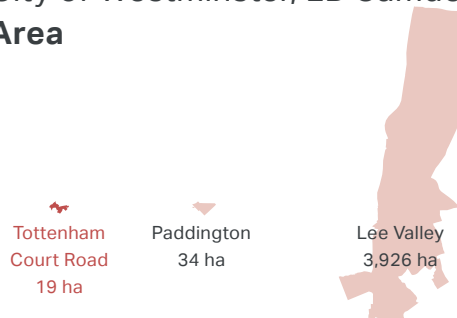
London Plan Designation Year



** Intensification area in 2004

Borough

City of Westminster, LB Camden
Area



Local Plan status

City Plan adopted in 2021 (including Policy 2 for the the OA). The council is undertaking a Partial Review of the City Plan, but Policy 2 is not in scope, Regulation 18 (Draft Camden Local Plan)

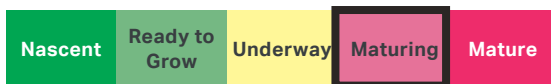
Growth Corridor

Central London Growth Corridor

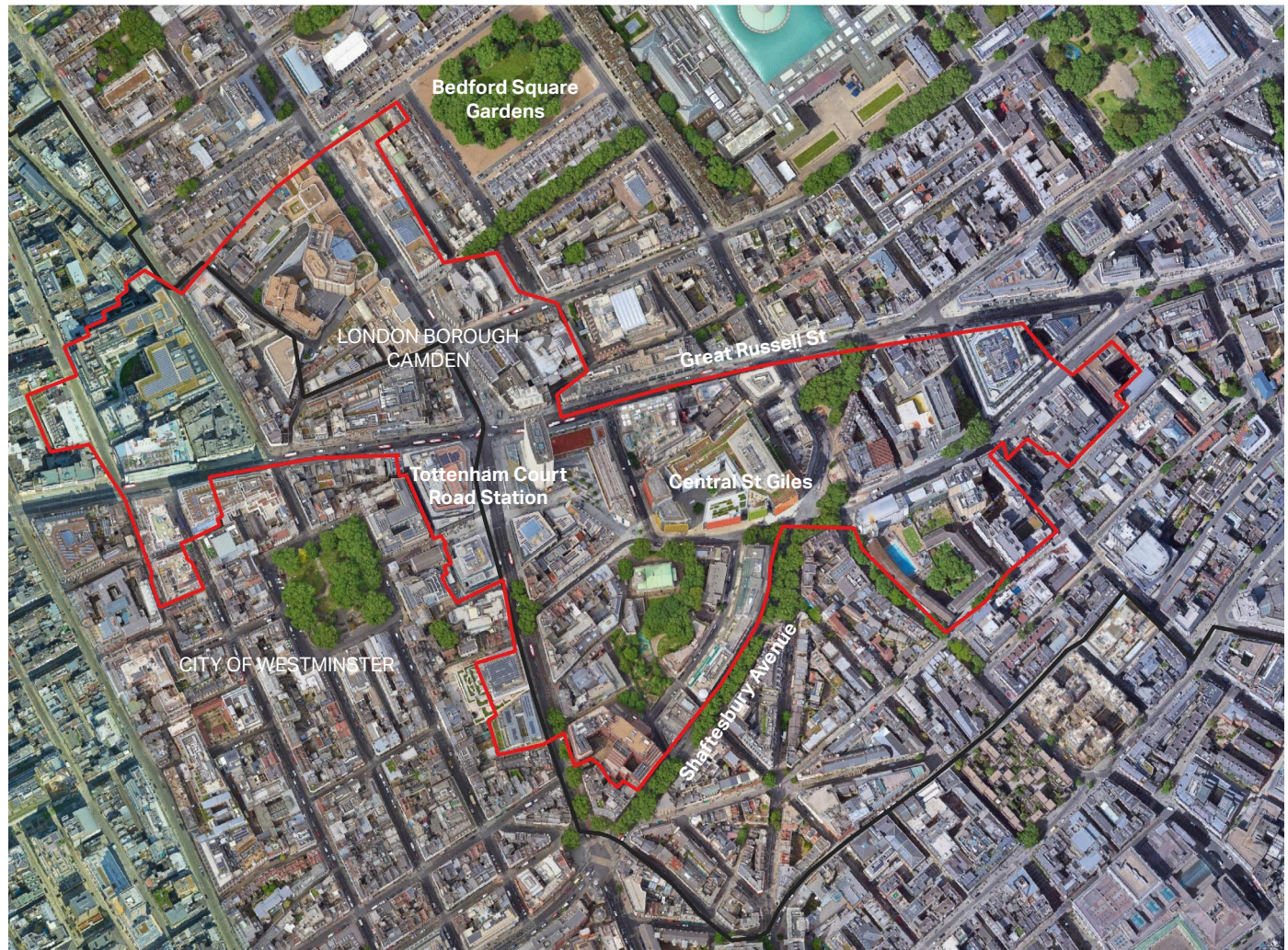
Housing Delivery Test 2023

None

OA status (London Plan 2021)



London Plan 2021 capacities by 2041



Source: Google Earth

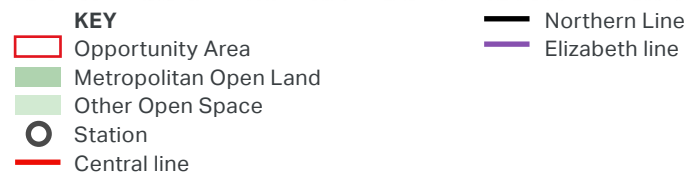
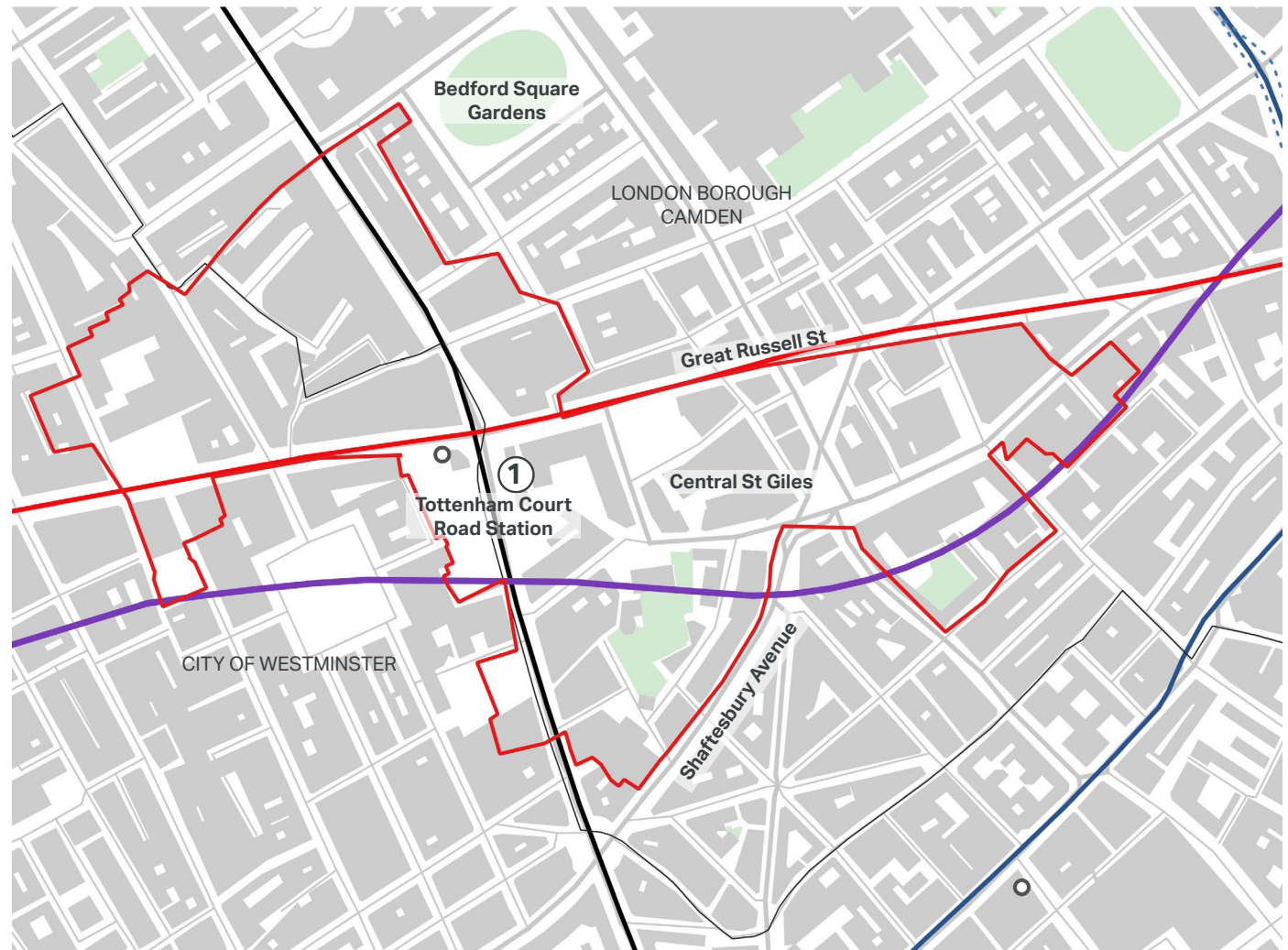
KEY
 Opportunity Area

*Note that the LESD (2021) reviews the capacity to 8,700 new jobs

Tottenham Court Road

Transport and connectivity

- Part of the Central London Growth Corridor.
- Well-connected area, with TfL identifying it as an OA where transport it is not holding back development.
- Elizabeth Line station opened in 2022.

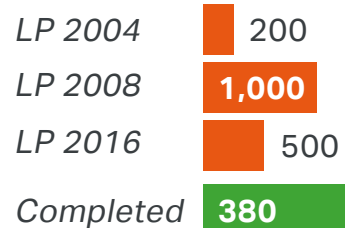


Tottenham Court Road

Delivery of homes

Delivery pre-2019

Completions since designation against capacity



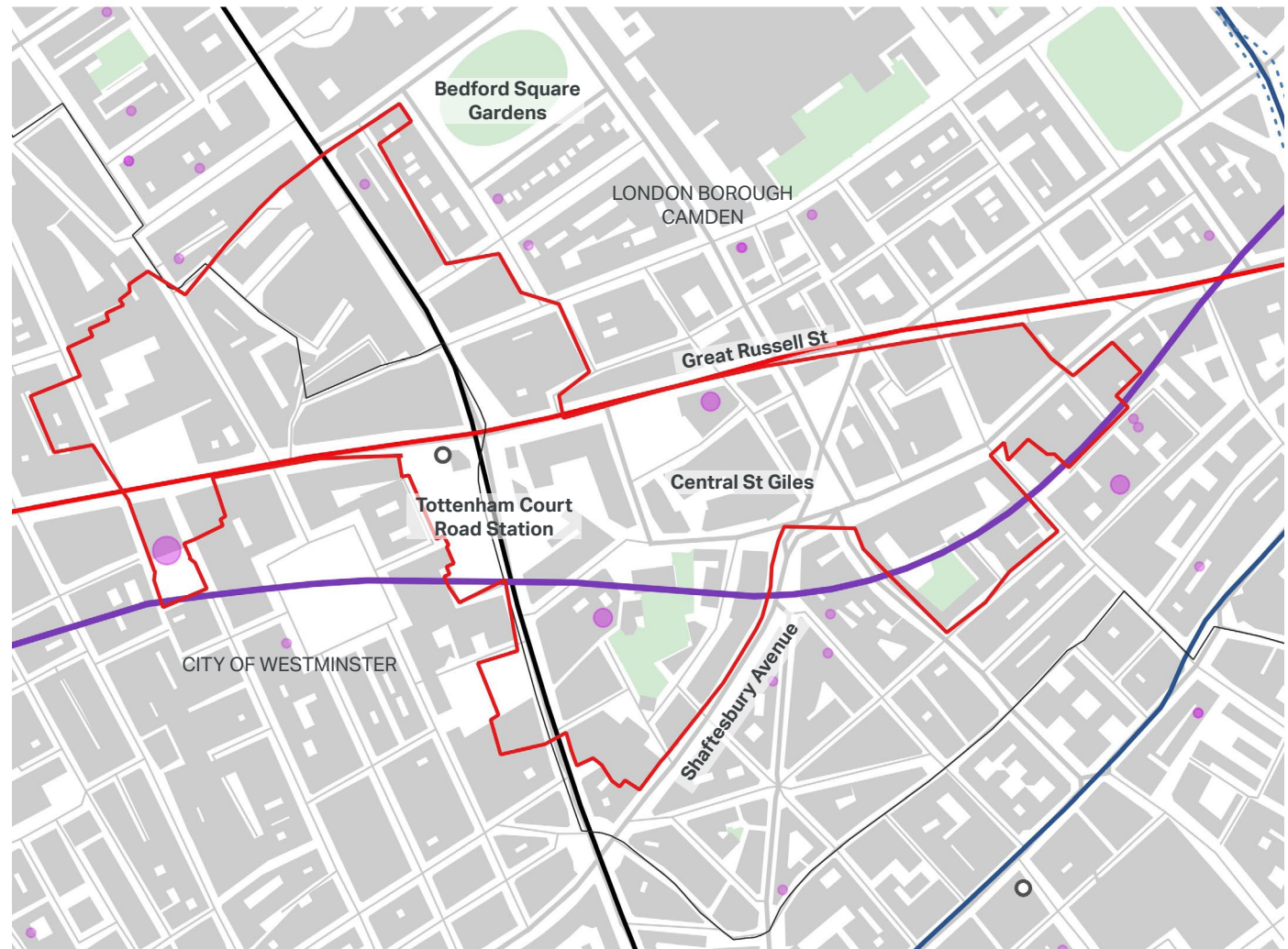
The OA exceeded its original capacity at designation. Pre - 2019, the OA was delivering at an average of 13 homes per year.

Delivery post - 2019 (London Plan 2021)

Progress against 22yr, 10 yr capacity



OA almost reached the 22 year capacity figure.



KEY

- Opportunity Area
- Pipeline (Planning Datahub, May 2023). Size of circle is proportionate to the number of homes.

*[Completions](#) account for all types of supply between 2019/2020 to 2023/2024.

** [Residential Pipeline in 2023/2024](#)

Notes: The 'pipeline' consists of any residential units that are live at the end of the financial year (2023/2024).

Tottenham Court Road

SHLAA 2017: Approvals and Allocations

- ① Rathbone Place completed in 2017/2018. 142 homes, 242,800 sq ft office space, 25,200 sq ft. retail space.



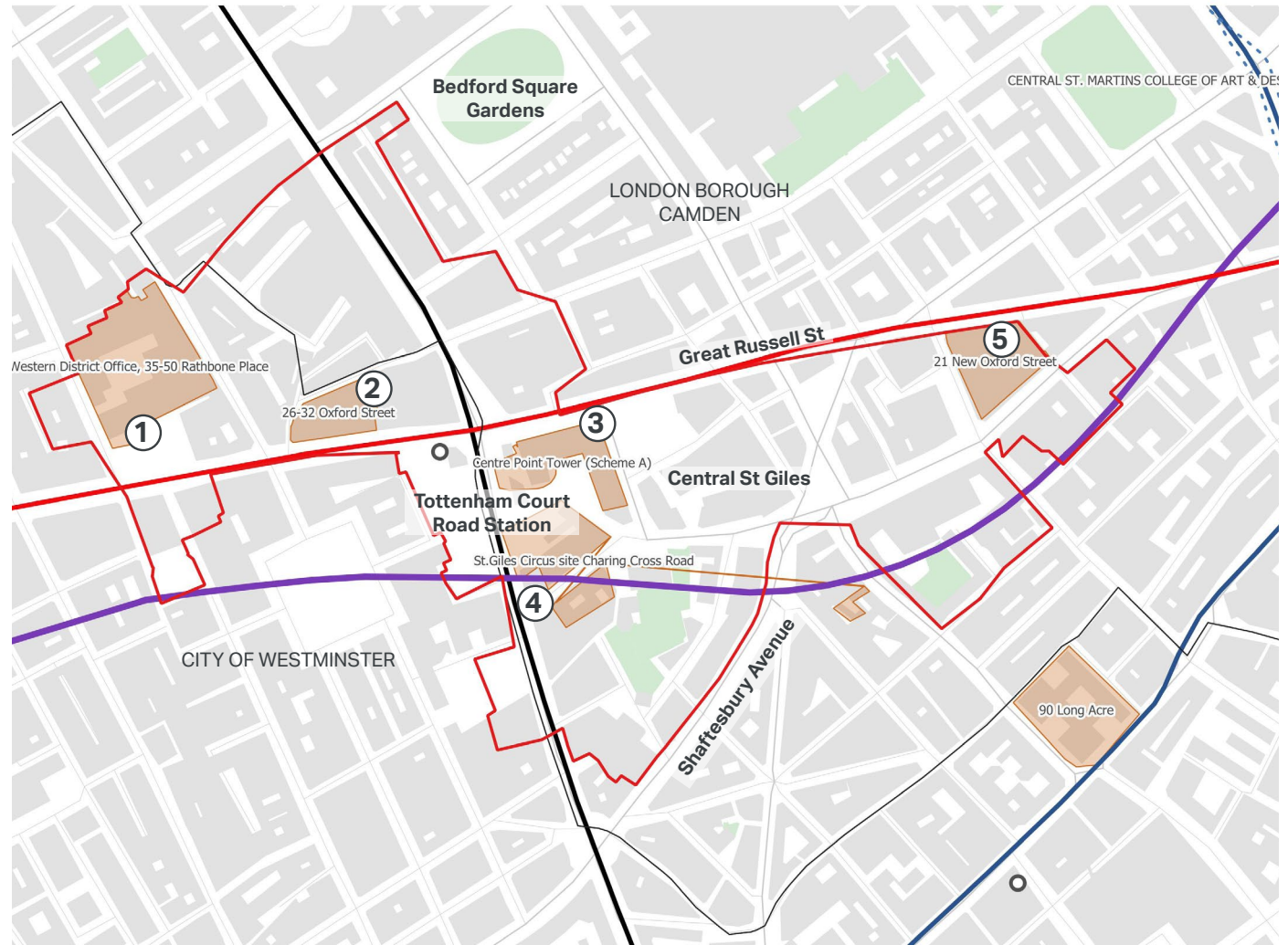
- ② Completed: 18 homes and more than 149,000sqft of retail space

- ③ Recently developed



- ④ Recently developed

- ⑤ Under construction/ advanced Construction stage



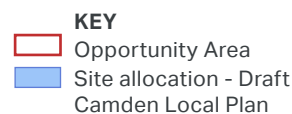
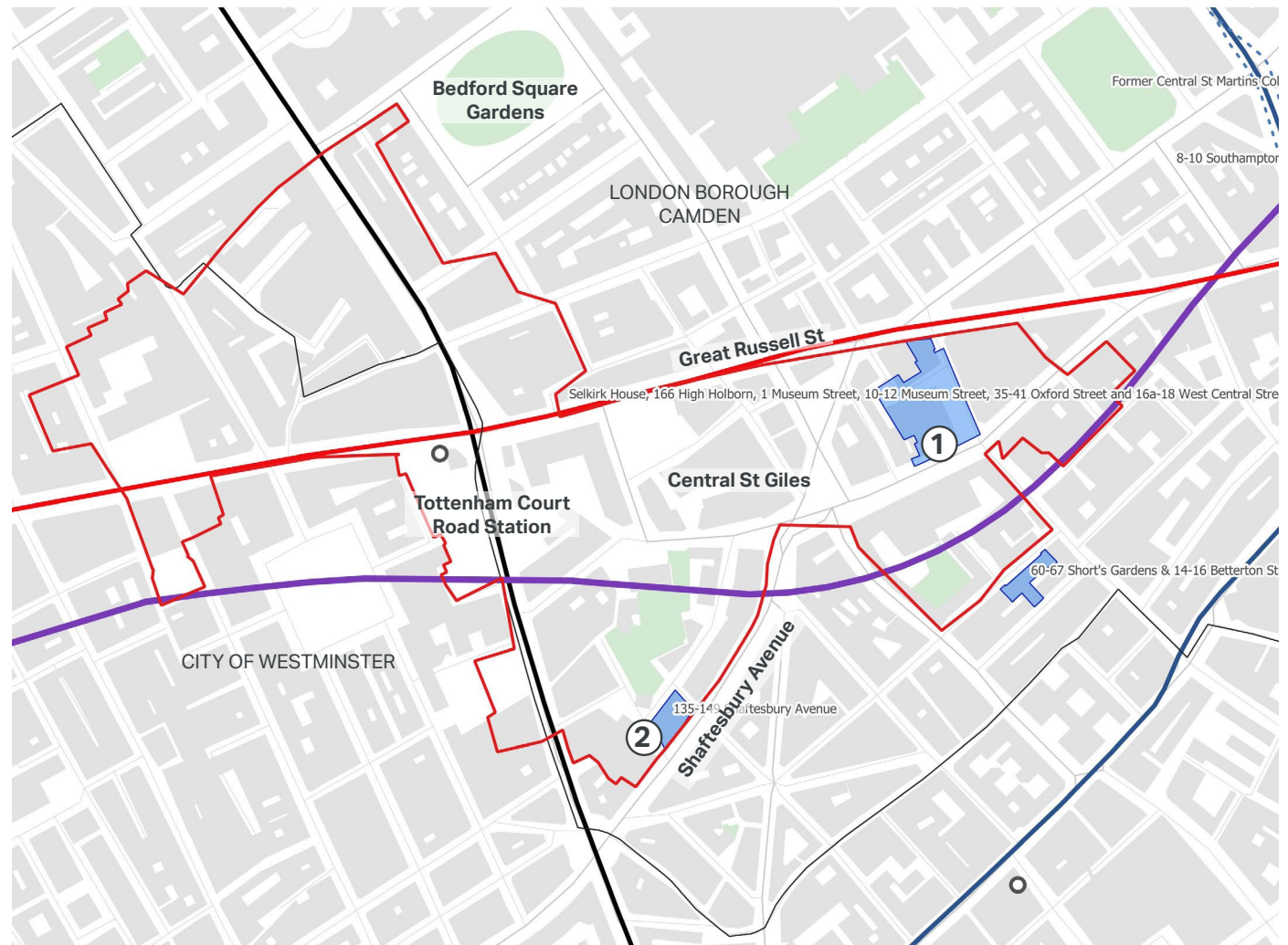
KEY
 [Red outline] Opportunity Area
 [Orange fill] Approvals and Allocations (SHLAA, 2017)



Tottenham Court Road

Site allocations: [LB Camden Draft Local Plan \(Reg.18\)](#)

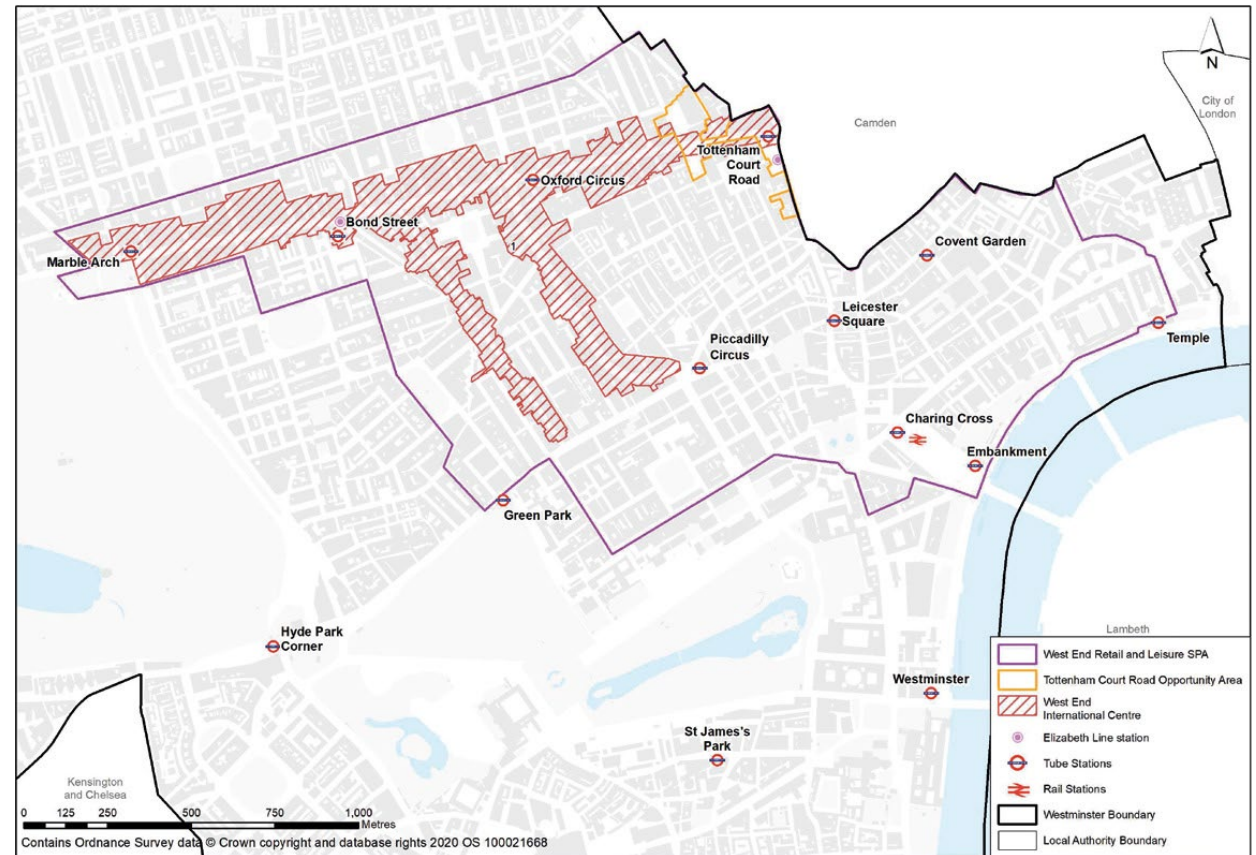
- Camdens's Draft Local Plan (January 2024) identified two site allocations in the OA:
 - ① S18: Selkirk House, 166 High Holborn, 1 Museum Street, 10-12 Museum Street, 35-41 New Oxford Street and 16a-18 West Central Street allocated for mixed use including offices, research and knowledge based uses, town centre uses, and permanent self-contained homes.
 - ② S19: 135-149 Shaftesbury Avenue: Theatre / cinema, cultural use
- The draft anticipates limited development expected in the Tottenham Court Road Opportunity Area, as development here is largely complete.



Tottenham Court Road

City Plan (2021)

- The current City Plan was adopted in April 2021.
- City of Westminster launched a partial review of the City Plan 2021. The Partial Review introduces five new policies and updates the affordable housing one.
- The OA is not in scope - the most recently adopted policy for Tottenham Court Road OA is Policy 2 in the adopted City Plan (2021). According to this policy, key spatial priorities for Paddington OA include:
 - TCR is one of London's more mature OAs, and given the progress already made on upgrading the station environs, a substantial contribution towards these growth targets has already been made.
 - Growth will be achieved through new developments with increased scale and massing that respect local context, including within Tottenham Court Road Opportunity Area, along Oxford Street, and the area's key thoroughfares



Source: City of Westminster

Tottenham Court Road

Development activity 2021

- Already in 2021 there was little land available for growth.
- Schemes consented across the OA.



Source: vu.city

KEY
Consented
Under construction
Completed

Tottenham Court Road

Development activity 2024

- Majority of consented schemes are now complete.
- Some ongoing consents, and some emerging.



Source: vu.city

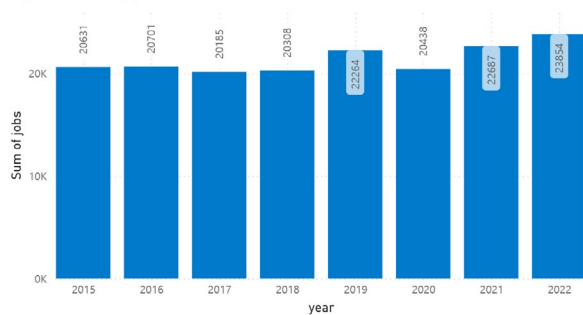
KEY	
■	Consented
■	Under construction
■	Completed

Tottenham Court Road Jobs

- High jobs density - role of CAZ and West End International Centre,
- In 2023, there were more than 24,000 jobs in the OA, placing the OA just outside the top 10 OAs with the highest number of jobs.
- The floorspace trends indicate a mature OA; with approvals dropping in recent years, as completions pick to deliver non-residential floorspace.
- Looking forward to schemes under construction, Class E floorspace will see a net increase of almost 6,800 sqm. (City of Westminster AMR).



Figure 2: Jobs by year



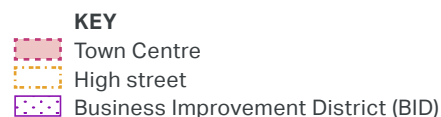
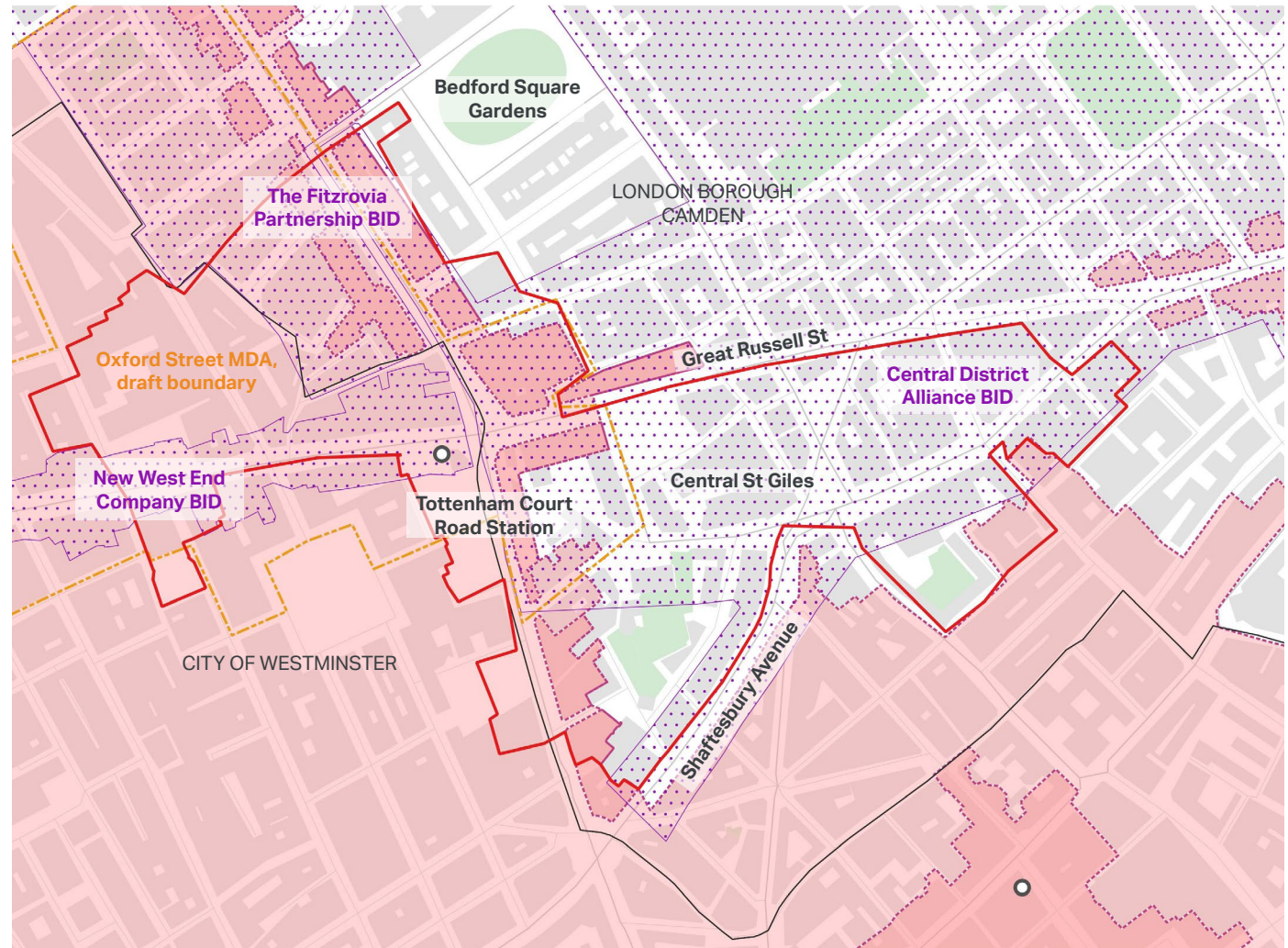
KEY
jobs in sqkm

- 0 - 1,900
- 1,900 - 4,000
- 4,000 - 13,000
- 13,000 - 60,000
- above 60,000

Tottenham Court Road

Town Centres and High Streets

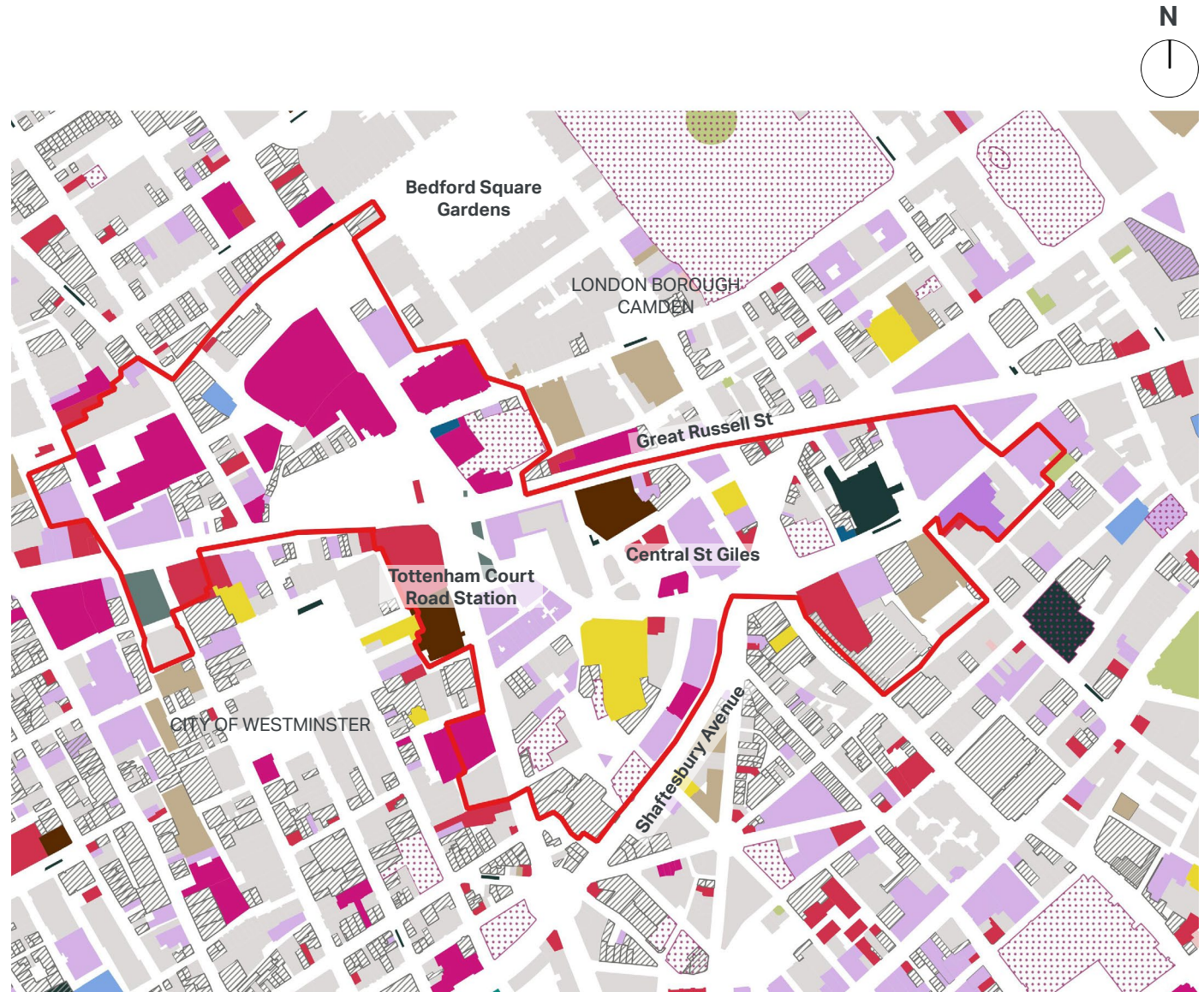
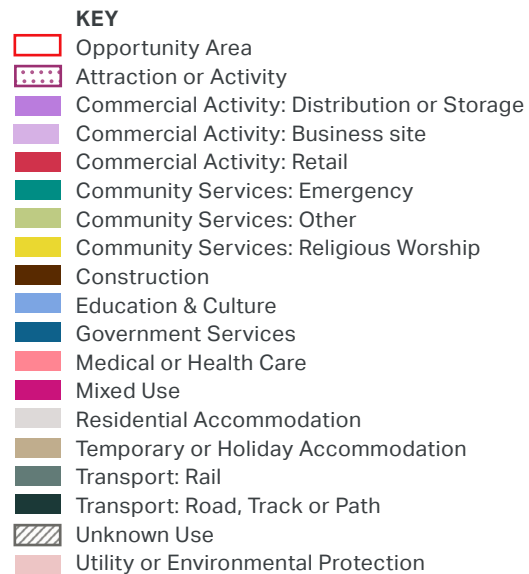
- Part of the West End International Town Centre is within the OA and Charing Cross Road (CAZ Retail Cluster).
- Three BIDs extend in the OA boundary.
- The Mayor of London is consulting on the [Oxford Street Mayoral Development Area \(MDA\)](#) - principle of pedestrianisation (28 February 2025 to 02 May 2025).
- A new Mayoral Development Corporation to unlock the true potential of Oxford Street and deliver a world-class, safe, accessible and clean street for all Londoners.
- Subject to the outcome of this consultation and of any subsequent consideration by the London Assembly, the Mayor's intention is for the MDC to be established by 1 January 2026.
- The diagram shows the draft MDA boundary in orange dashed line.



Tottenham Court Road

Land uses

- The mixed-use, retail and business nature of the OA is evident on the map.



Source: OSNGB, City Intelligence Unit (GLA)

Tottenham Court Road

Moving forward

- Most of the indicative capacity for homes set out in the London Plan 2021 has been met.
- The delivery rate of jobs per year (397 jobs/year) is meeting the expected delivery rate per jobs per year (395 jobs/ year, LESD), whilst the floorspace trend (approvals vs completions) indicate a mature OA that since the London Plan 2021 has been focusing on completions.
- The Draft Plan for Camden only indicates two sites within the OA.
- The draft WCC partial review acknowledges TCR as one of London's more mature OAs, and given the progress already made on upgrading the station environs, a substantial contribution towards these growth targets has already been made.

Proposition

- OA to be moved to 'mature', effectively to be de-designated in the next plan. The OA does not meet the OA criteria for designation.
- Opportunities for growth is relatively small site, where there is potential for developments with increased scale and massing that respect local context, including within Tottenham Court Road Opportunity Area, along Oxford Street, and the area's key thoroughfares.
- The Oxford Street Programme could act as a key driver for regeneration and public realm transformation.

