8 STRATEGIC DIRECTION AND RECOMMENDATIONS

Context for Strategic Direction of Centres

8.1 PPS4 provides detailed guidance on the approach local authorities should adopt for promoting competitive town centres and selecting sites for new town centre uses. In the context of this study and the strategic direction for the district's centres, the following are considered:

- Define a hierarchy of centres and make choices about which centres will accommodate any identified need for growth in town centre uses (Policy EC3.1b.i);
- Plan for a strong retail mix so that the range and quality of the comparison and convenience offer meet the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of a centre (Policy EC4.1b);
- Identify a range of sites to meet the need for additional town centre uses and allocate sufficient sites in DPDs to meet at least the first five years of identified need (Policies EC5.1 and EC5.5).

8.2 PPS12's test of soundness requires the Council to demonstrate that its chosen strategy is the most appropriate, when considered against reasonable alternatives and, secondly, that the chosen strategy is effective and deliverable. To assist the Council and to inform considerations of reasonable alternative strategies, we have outlined potential options for each of the six centres that have been assessed.

8.3 When assessing strategies for meeting retail and leisure needs, those that would clearly not accord with national and regional policy have been dismissed. Such inappropriate strategies include trying to meet most of the need in out-of-centre retail parks or suggesting significant growth for any of the centres in Epping Forest that would not be commensurate with their scale. In addition, we consider that all reasonable strategies should acknowledge our suggested revision of the hierarchy of centres and the availability of opportunity sites within or on the edge of smaller centres.

Local Distinctiveness

8.4 In considering the above national policy advice, we are acutely aware that the district's centres are, in some respects, unique and differ considerably from those in a 'typical' local authority. The district is located on the edge of Greater London and significant parts of it have good if not excellent access into the City and the West End. All the centres contribute to local residents and visitors in terms of community facilities, as well as providing shops and leisure activities. Some of the smaller centres may be susceptible to future possible changes in shopping patterns and habits.

8.5 There is no single planning 'solution' for all the district's centres and we have sought to set out our suggestions and recommendations on this basis. For the six main centres in the district, we set out below our recommendations in respect of:

- A proposed revision to the district's hierarchy of centres;
- Retail and leisure floorspace requirements for the district as a whole, which are rounded to the nearest 100 sqm for ease of presentation;
- How best these requirements can be achieved. In this respect, our reservations as to the accuracy of longer term forecasts mean that more weight should be given to the 2009-2021 requirements. The requirements to 2026 and 2031 are less reliable and should be reviewed within five years of this study and with regular monitoring thereafter; and
- A detailed commentary and suggestions for the future planning of each of the district's six main centres.

8.6 The evidence, proposals and recommendations below are intended to inform future DPDs and SPDs.

Hierarchy of Centres

8.7 In **Section 3** there is a detailed assessment of the vitality and viability of the six centres within the district. These assessments culminate in a suggested revision to the hierarchy in the district, as set out in **Table 8.1** below.

Table 8.1 Suggested revision of EFDC hierarchy of centres

Position in Hierarchy	Centres
Town centre	Epping, Loughton High Road
Small district centre	Waltham Abbey, Loughton Broadway, Chipping Ongar, Buckhurst Hill

8.8 The terminology we have adopted is intended to be consistent with the terminology in PPS4. However, it is appreciated that variations on this terminology can be considered as part of the LDF process. Therefore, for the purposes of our recommendations, we suggest that Waltham Abbey, Loughton Broadway, Chipping Ongar and Buckhurst Hill are designated as 'Small District Centres'. Although these centres do not fully meet the district centre definition in PPS4, we consider that they fulfil a wider role than afforded the local centre definition in PPS4. Therefore, the compromise of a 'Small District Centre' has been recommended.

Summary of Need for Town Centre Floorspace in the District

8.9 **Sections 6 and 7** analyse the need for retail and leisure floorspace. Turning first to quantitative need, the district-wide position is summarised in **Table 8.2**. This draws together comparison and convenience quantitative need, as well as leisure orientated food and drink need. This adopts the following scenarios:

- **Comparison goods:** increased market share
- **Convenience goods:** increased market share *excluding* overtrading
- **Food and drink leisure uses:** constant market share

8.10 These outputs for comparison and convenience goods are based on a 'front loading' process that increases the market share earlier in the study timeframe than under constant market shares and reduces expenditure leakage. To achieve this increase in market share, a development of a sufficient scale will need to be planned for in order to achieve a step change in shopping patterns to reduce expenditure leakage. In quantitative terms, we consider that any attempt to promote a substantial increase in market share beyond our assumptions for the district's centres is unlikely, in market terms, to be achievable.

8.11 The additional floorspace need derived from overtrading has been excluded from summary outputs for the convenience exercise. This is reflective of CLG's advice that caution should be applied when using benchmark turnovers to estimate quantitative need and that overtrading should not be considered in isolation. However, this evidence of overtrading is potentially a further source of expenditure to support new floorspace and is a qualitative indicator of need (addressed below).

8.12 The option of a declining market share is, in our view, inconsistent with the spirit of PPS4 and the requirements of regional policy to encourage urban renaissance of the smaller centres.

Table 8.2 Summary of Quantitative Need within Epping Forest District

	2009- 2016	2009- 2021	2009- 2031
A1 comparison sqm gross	13,700	21,600	38,100
A1 convenience sqm gross (superstores or supermarkets)	3,700	4,900	7,400
A1 convenience sqm gross (small foodstores or deep discounters)	3,600	4,800	7,200
A1 service/A2 sqm gross	1,400	2,200	3,800
A3, A4 and A5 sqm gross	1,000	2,500	5,800
Total sqm gross for A1-A5 uses	23,400	36,000	62,300

Source: Appendix 6 (it is assumed that the A1 service/A2 requirements are 10% of the gross comparison requirements). Requirements are rounded to the nearest 100 sqm gross.

8.13 The above floorspace requirements are presented cumulatively in aggregate; i.e. there is a quantitative need for 13,700 sqm (gross) of additional comparison floorspace in the district by 2016, increasing to 21,600 sqm (gross) by 2021. Similarly, in respect of a quantitative need for convenience floorspace (in respect of superstores or supermarkets), there is a quantitative need for 3,700 sqm gross by 2016, increasing to 4,900 sqm gross by 2021.

8.14 Extreme caution is recommended if planning on the basis of the longer term forecasts to 2031 and these should be considered as indicative only. The quantitative outputs should be treated with a degree of flexibility and married closely with qualitative matters consistent with the equal weight afforded by PPS4.

8.15 In terms of qualitative need, there were the following clear messages from our assessments:

- There are reasonably high levels of expenditure leakage from the district for both the comparison goods and convenience goods sections and there is an opportunity to 'claw back' some of this expenditure to the district;
- There is scope to accommodate national multiples to provide for local needs and provide a balance between independents and higher order operators;
- Requirements for floorspace indicate that there is demand, including from some clothing operators, to occupy space within the larger centres in the district – namely Epping and Loughton High Road; and
- In aggregate, there is modest overtrading of the existing foodstores and there is expenditure leakage to larger stores outside the district. There is thus some scope for an improvement in the convenience retail offer in order to increase choice and competition.

8.16 In respect of leisure, our assessment found that there is potential for development to improve the local commercial leisure provision. Although there is potential for cinema provision in the district, it is unlikely that large cinema development would be delivered within Epping Forest. However, we do consider there is scope for a smaller art house cinema, alongside other family entertainment provision to improve the cultural and entertainment facilities locally. There is also scope for higher quality development in the food and drink sector to meet locally generated expenditure growth.

8.17 It will be down to the LDF process to consider the most appropriate destination for quantitative need for additional floorspace in the district based on the increasing market share scenario. However, as a starting point and to assist in formulating our suggested strategies, the quantitative need has been disaggregated by centre. This disaggregation takes into account the availability of sites, the accessibility and function of the centres, their existing market share, the position of the centres in our recommended revision to the hierarchy of centres and any qualitative considerations we have identified. The percentages used to disaggregate the quantitative need outputs are set out in **Table 8.3**. But this breakdown should be treated with flexibility due to the duty of the LDF process to test reasonable alternatives and the scarcity of sites of a sufficient scale in some of the centres.

Table 8.3 Indicative Breakdown of District-Wide Need by Centre

Centre	A1 comparison (%)	A1 convenience (superstores or supermarkets (%)	A1 convenience (small stores or deep discounters) (%)	A1 Service or A2 (%)	A3-A5 (%)
Epping	40.0%	50.0%	0.0%	30.0%	30.0%
Loughton High Road	20.0%	0.0%	50.0%	15.0%	15.0%
Waltham Abbey	15.0%	0.0%	0.0%	15.0%	15.0%
Loughton Broadway	20.0%	50.0%	0.0%	20.0%	20.0%

Chipping Ongar	2.5%	0.0%	50.0%	10.0%	10.0%
Buckhurst Hill	2.5%	0.0%	0.0%	10.0%	10.0%
TOTAL	100%	100%	100%	100%	100%

8.18 As explained earlier, we have considered reasonable alternative strategies in accordance with PPS12, before suggesting potential long term outcomes for the six centres. These outcomes are based on suggested floorspace targets which are necessary to increase the combined market share of all of the district's centres vis-à-vis competition from other centres elsewhere in the sub-region and from out of centre developments. Consequently, it is intended that retail expenditure leakage from the district will be reduced during the study timeframe.

8.19 Our recommendations for each centre are structured in a similar manner. However, the floorspace outcomes are not prescriptive and importantly, we have not identified any spatial proposals for Chipping Ongar or Buckhurst Hill since our study has not revealed any suitable opportunity sites that could accommodate any growth of town centre uses. Under each centre, we provide our recommendation on the most appropriate strategy, albeit we have not sought to pre-determine the options that the Council will eventually follow as part of its emerging development plan documents.

Epping

Context and Reasonable Options for Epping

8.20 Epping is currently designated as one of three principal centres within the district and we recommend that it is defined as a town centre within a revised hierarchy. Epping's MHE Index ranking has fallen from 829 in 2003 to 896 in 2008. Despite this, our health check revealed a vital and viable centre. Epping benefits from a good range of national multiples and independents, a low number of vacancies and in recent years has benefited from increasing rents. However, Epping is a linear centre and to some extent suffers from a lack of depth and a natural retail circuit. This means that frontages at the periphery of the centre may suffer.

8.21 Since Epping is one of the two largest centres within the district, it should be the planned location for any larger scale town centre uses that have been identified. However, in relative terms Epping is a much smaller centre than some nearby competitors such as Harlow to the north and Romford to the south. Furthermore, opposed to other centres in the district there has been no recent major investment in the retail stock of Epping town centre. There is an opportunity to improve the quality of the retail floorspace stock in the centre to meet some of the published demand from occupiers. Therefore, we consider it important that Epping reinforces its role and accommodates its local, rather than sub-regional, needs and improves the quality of the retail units in the centre.

8.22 Epping's natural comparison and convenience catchment is confined to our survey zone 1, although there is strong competition from Harlow to the north. The population of zone 1 is forecast to increase by some 2,552 persons between 2009 and 2021. We have forecast some £50.9 million of comparison expenditure growth in zone 1 to 2021 and some £11.4 million of convenience expenditure growth. Whilst we appreciate that Harlow will have a claim on a proportion of this additional expenditure, there are sound planning reasons why Epping should provide for its own locally generated needs during the plan period. The two policy options we have identified are included at **Table 8.4**.

Table 8.4 Options for the future of Epping

Options	Key Potential Characteristics
Option 1: No Significant Change	▪ There is a potential for and risk of further decline in Epping's retail ranking, with potential short term increases in the vacancy rate ▪ There could be a dilution of the retail offer, with A2-A5 uses becoming more prominent over time ▪ The retail function of the centre will shift towards a smaller service orientated centre, with a leisure and service offer rather than any substantial retail offer
Option 2: Modest Redevelopment	▪ A modest expansion, improving the retail and leisure offer would consolidate the role of the centre and claw back expenditure ▪ Provision of further retail and leisure floorspace will encourage linked trips between the new uses and existing businesses ▪ New development can be used to fund improvements in local infrastructure and the public realm

Source: RTP Recommendations

Development Potential

8.23 Under Option 2 above, we consider there is an opportunity to achieve additional floorspace within the town centre and reduce expenditure leakage from Epping's catchment and the district as a whole. Thus we have suggested a potential long term strategy for Epping as set out below in **Table 8.5**. This arises from the opportunity afforded the St John's Road site (explained below) and results in Epping claiming a larger proportion of the comparison quantitative need than other centres due to its position at the top of the hierarchy (with Loughton High Road).

Table 8.5 Potential Long Term Strategy Outcome for Epping

	2009- 2016	2009- 2021	2009- 2031
A1 comparison sqm gross	5,500	8,600	15,200
A1 convenience sqm gross (superstores/supermarkets)	1,900	2,500	3,700
A1 convenience sqm gross (small foodstores/deep discounters)	0	0	0
A1 service/A2 sqm gross	400	700	1,100
A3, A4 and A5 sqm gross	300	800	1,700
Total sqm gross for A1-A5 uses	8,100	12,600	21,700

Source: RTP Strategy based on the district-wide outputs from Table 8.2

8.24 Focusing on the requirement to 2021, we have estimated that a total floorspace of 12,600 sqm (gross) of A1-A5 uses could be accommodated within Epping, including some 8,600 sqm (gross) of comparison floorspace. Epping currently has 25,680 sqm (gross) of A1-A5 uses, including some 11,180 sqm (gross) of comparison floorspace. Therefore, this would be an uplift on the existing floorspace in the centre, with an increase of 75% on the existing comparison floorspace. Importantly, we have made an allowance for 2,500 sqm gross of additional superstore/supermarket floorspace within Epping in order to improve competition with the Tesco store and relieve overtrading. Although ambitious, we consider a development of a similar scale is necessary in order to deliver a step change in shopping patterns and reduce expenditure leakage from the district. However, if an increasing market share is preferred, this should be delivered through a town centre scheme rather than any out of centre floorspace.

Spatial Proposals

8.25 A plan of Epping is attached at **Appendix 9**. This includes a series of development opportunity sites, which we consider are suitable for new town centre floorspace. The most apparent site for redevelopment of any significant scale within Epping is the St. John's Road site. This extends to some 3.0 ha and we understand the Council is currently considering options for its future development. If Option 2 is preferred as a basis for LDDs, we suggest the following inputs when considering development potential of sites in Epping:

- There is potential for the redevelopment of the St John's Road site and other sites in the centre for a mix of uses to include up to 12,600 sqm (gross) of A1-A5 uses by 2021;
- Every opportunity should be taken to provide for both larger unit sizes in any development, whilst an allowance for food and drink leisure uses should be made to build upon the existing successful offer in the town; and
- Any new development should be well integrated with the remainder of the town centre, ensuring a successful retail circuit is established.

Summary of Recommended Strategy for Epping

8.26 Our study has not sought to pre-determine the option that will be adopted for Epping. It is currently performing well and in the short term a no change option will not necessarily weaken the centre, since Epping is already trading successfully. However, in the longer term (say 5 to 15 years) this may not continue and there is a real opportunity to build on expenditure growth within zone 1. Therefore, it is our recommendation that Option 2 will deliver material benefits for Epping and reinforce its role at the top of the district's hierarchy of centres.

Loughton High Road

Context and Reasonable Options for Loughton High Road

8.27 Alongside Epping, Loughton High Road is also currently designated as a principal centre within the district and we also recommend it is designated as a town centre within a revised hierarchy. In terms of turnover and floorspace, it is the largest centre within the district and benefits from two large foodstores - a modern Sainsbury's and a Morrison's. It has a limited range of national multiples, but one of the main suggestions for improvements in the visitor survey was for more national multiples as well as an improved food and drink offer. We also note that there are some 20 requirements from commercial operators for space in the centre. The centre has good accessibility, but suffers from high levels of traffic on the High Road. Separately, our survey revealed some reports of crime in the evening.

8.28 As with Epping, the other principal centre under the existing retail hierarchy, we expect that Loughton High Road represents a natural destination for expenditure growth. Loughton High Road's core catchment for both comparison and convenience goods is survey zone 2, although it draws trade from all its surrounding zones, namely 1, 6, 7 and 8. Up to 2021 in zone 2 alone there will be £42.5 million of comparison expenditure growth and some £9.7 million of convenience expenditure growth. This growth is potentially available to support an urban renaissance of the centre. This would be entirely consistent with regional policy for smaller centres and would enable the centre to continue to maintain its importance to local residents in terms of its retail, leisure and community offers.

8.29 Again as with Epping, we consider promoting a 'no change option' will not necessarily lead to the centre suffering to an unacceptable extent. However, as Loughton High Road is one of the two largest centres in the district, we consider that a modest expansion of the centre could and should be appropriate, subject to suitable sites being identified and brought forward within the plan period. We summarise the two options we have identified in **Table 8.6** below.

Table 8.6 Options for the future of Loughton High Road

Options	Key Potential Characteristics
Option 1: No Significant Change	▪ There is potential for and risk of decline in retail ranking ▪ The quality of the shopping offer could suffer, with lower order outlets and charity shops dominating the provision. ▪ The retail function will shift towards a lower end offer and without investment the urban fabric could suffer
Option 2: Modest Redevelopment	▪ A modest expansion, could upgrade the retail and leisure offer and respond to the published commercial requirements for the centre. ▪ Provision of further retail and leisure floorspace will encourage linked trips between the new uses and existing businesses ▪ New development can be used to fund improvements in community infrastructure and improve the public realm

Source: RTP Recommendations

Development Potential

8.30 Although Loughton High Road is the largest centre in the district, it is embedded in a relatively dense urban area which limits the scope for expansion. Indeed, we expect that the most likely manner in which a major development could be delivered would be for a large part of the centre to be redeveloped and the uses intensified. Due to the uncertainty over future development sites, the allowance for additional comparison floorspace is lower than for Epping. A potential floorspace strategy is set out in **Table 8.7** below.

Table 8.7 Potential Long Term Strategy Outcome for Loughton High Road

	2009- 2016	2009- 2021	2009- 2031
A1 comparison sqm gross	2,700	4,300	7,600
A1 convenience sqm gross (superstores/supermarkets)	0	0	0
A1 convenience sqm gross (small foodstores/deep discounters)	1,800	2,400	3,600
A1 service/A2 sqm gross	200	300	600
A3, A4 and A5 sqm gross	200	400	900
Total sqm gross for A1-A5 uses	4,900	7,400	12,700

Source: RTP Strategy based on the district-wide outputs from Table 8.2

8.31 Focusing on the requirement to 2021, we have estimated that a total floorspace of 7,400 sqm (gross) of A1-A5 uses could be accommodated within Loughton High Road, including some 4,300 sqm (gross) of comparison floorspace. The centre currently has 33,590 sqm (gross) of A1-A5 uses, including some 10,830 sqm (gross) of comparison floorspace. In light of the existing large foodstores within the centre, we have not allowed for any new superstore/supermarket floorspace. We have however allowed for additional small foodstores/deep discount floorspace (2,400 sqm gross by 2021) in order to improve competition and choice.

Spatial Proposals

8.32 A plan of Loughton High Road is attached at Appendix 9. As explained above, there are limited development opportunities within the centre and we expect the only way a major development could be delivered would be through intensification of the existing floorspace, potentially via the redevelopment of existing units. The only development opportunity site we have identified is the Browns car show room site which extends to 0.2 ha. However in May 2009 planning permission was granted for a 810 sqm of retail (three A1 units) as well as a restaurant (A3; 349 sqm). The permitted A1 floorspace will, on implementation, absorb some of the localised need in the short term.

8.33 Should any developments be promoted during the local development framework process, we suggest the following principles be embedded within new policies:

- Opportunities to be taken to provide larger modern units suitable for comparison occupiers;
- Design should be of a high quality;
- Integration should be secured with other elements of the town centre and the underground station; and
- Development promoted in a holistic manner in order to improve the environment and reduce crime creating a pleasant and attractive town centre destination for the local population.

Summary of Recommended Strategy for Loughton High Road

8.34 Due to the lack of obvious development opportunities found as part of our study, a no change option is a possibility for Loughton High Road. However, we consider there is scope for redevelopment for up to 7,400 sqm (gross) of A1-A5 uses up to 2021, assuming that a suitable site(s) in the town centre can be identified. This is most likely to be achieved by means of an intensification of existing uses. If a major development is a preferred option for the town, then public sector involvement is likely to be necessary to deliver such a development. Since Loughton High Road is the largest centre in the district, we recommend the Council should actively consider potential development sites with the aim of achieving Option 2.

Waltham Abbey

Context and Reasonable Options for Waltham Abbey

8.35 Waltham Abbey is a historic town with a limited retail offer and limited public transport accessibility. It is currently designated as a Principal Centre within the district, but due to its limited range of uses we have suggested it is designated as a small district centre. Its MHE Index ranking in 2008 was 1,590, whilst Tesco is the only Goad retailer present and indicates a general lack of national multiples in the town.

8.36 In 2009, the vacancy level in Waltham Abbey was broadly in line with national averages and there were only five requirements for additional floorspace. It is also the only centre in the district with a small bulky goods retail park nearby, namely Highbridge Retail Park. We note that permission has recently been granted for deep discounter stores (Lidl and Aldi) in out of centre locations. We understand that Aldi have now withdrawn their interest, although the permission remains extant until 3rd December 2011. In terms of the Lidl proposal for 1 Cartersfield Road, a S106 agreement was signed by all parties on 18th September 2009 and the store is now open.

8.37 Waltham Abbey also suffers from the nearby out of centre Brookfield Centre which draws much of the local trade away from the town. It seems likely that there is some correlation between this fact and the responses from the visitor survey which indicate dissatisfaction with the existing retail offer in Waltham Abbey centre itself. The retail core of Waltham Abbey is concentrated on Sun Street, although we note the existing town centre boundary extends west towards Highbridge Street, Leverton Way and Church Street, and beyond Stewardstone Road to the south-east, to include Tesco. We have only identified one development opportunity in Waltham Abbey, although this is largely due to the town's conservation area. There is also a prospect to build on the tourism opportunity presented with the location of the Lee Valley White Water Canoe Centre nearby.

8.38 It is widely acknowledged that Waltham Abbey does not have critical mass as a centre. It lacks the physical capacity and accessibility to compete with larger centres nearby. However, its mass and capacity have been increased by the Local Plan Alterations to Town Centre boundaries (of 2006), which included the Tesco store. The centre is important for the district, with a distinct tourism role. A no development option is reasonable, although due to the pressures from out of centre floorspace we suggest that this is promoted alongside improved town centre management.

8.39 We also consider that a 'modest development' option, as proposed for Epping and Loughton High Road, is not reasonable for Waltham Abbey due to the lack of physical capacity. However, a realistic option could be to encourage smaller scale developments to build on the tourism attraction of the centre. Our suggested policy options are outlined in **Table 8.8** below.

Table 8.8 Options for the future of Waltham Abbey

Options	Key Potential Characteristics
Option 1: No New Development with Improved Town Centre Management	▪ Marketing of the centre will be improved, encouraging visitors and improving turnover of the existing retailers. ▪ Visitors will be attracted to the centre due to its historic heritage features and its link to the nearby Olympic facilities.
Option 2: Small Scale Development with Improved Town Centre Management	▪ Small scale mixed use retail and leisure development will be encouraged if it integrates with the existing retail core

	and offers new accommodation. ▪ The improved town centre management at Option 1 will also be encouraged.

Source: RTP Recommendations

Development Potential

8.40 Despite our options only considering limited growth for Waltham Abbey, we have considered a potential outcome for the centre that includes an uplift in floorspace. This would contribute to the small scale developments as envisaged under option 2. This potential outcome is outlined at **Table 8.9** below.

Table 8.9 Potential Long Term Strategy Outcome for Waltham Abbey

	2009- 2016	2009- 2021	2009- 2031
A1 comparison sqm gross	2,100	3,200	5,700
A1 convenience sqm gross (superstores/supermarkets)	0	0	0
A1 convenience sqm gross (small foodstores/deep discounters)	0	0	0
A1 service/A2 sqm gross	200	300	600
A3, A4 and A5 sqm gross	200	400	900
Total sqm gross for A1-A5 uses	2,500	3,900	7,200

Source: RTP Strategy based on the district-wide outputs from Table 8.2

8.41 Applying this potential outcome to Waltham Abbey and focusing on the requirement to 2021, we have estimated that a total floorspace of up to 3,900 sqm (gross) of A1-A5 uses could be accommodated within Waltham Abbey, including some 3,200 sqm (gross) of comparison floorspace. Waltham Abbey currently has 11,245 sqm (gross) of A1-A5 uses including only 1,900 sqm (gross) of comparison floorspace (excluding the Tesco store).

8.42 If the potential for additional floorspace was implemented in its entirety, it would represent a significant uplift on the existing floorspace in the centre and sites would need to be identified to accommodate this growth. In light of the nearby Tesco and LiDL stores, we have not included any convenience provision within our estimates for potential increases in floorspace.

Spatial Proposals

8.43 We have only identified one development opportunity site in Waltham Abbey, namely the car park site to the south of Sun Street (0.39 ha). This is an operational car park that has good linkages with Sun Street. This provides an opportunity to improve the retail offer in the centre and retain a larger proportion of trade, potentially building upon the tourism offer emerging in neighbouring Broxbourne. Should this opportunity be feasible within the plan period, we suggest the following principles be reflected within any DPD or subsequent application:

- There is scope for up to 3,200 sqm (gross) of A1-A5 floorspace to 2021;
- Every opportunity should be provided to establish linkages between the development and Sun Street;
- A range of unit sizes should be provided to enable national multiples and high quality smaller retailers or independents to occupy the development; and
- A range of A3 uses should be provided to build on local tourism and the heritage offer.

Summary of Recommended Strategy for Waltham Abbey

8.44 Waltham Abbey has a limited offer compared to Epping and Loughton High Road. The focus of the centre's future should be enshrined within improved town centre management to take advantage of its heritage characteristics and tourism opportunities. We suggest the LDF focuses on achieving a niche role for the centre, encouraging small scale mixed use developments if they present themselves in the plan period (which is effectively option 2). In addition, we consider the Council should undertake more detailed feasibility work on the potential for the development of the car park site during the plan period.

Loughton Broadway

Context and Reasonable Options for Loughton Broadway

8.45 Loughton Broadway (or Debden) is currently designated as a smaller centre. We recommend its designation is altered to a small district centre, albeit with the potential to elevate its position to a district centre. In some ways, the centre is unique in the district since it the only centre to have a single purpose built shopping parade, originally constructed in 1958. Loughton Broadway has recently undergone a series of environmental improvements and in September 2008, the Council adopted the 'Debden Town Centre and Broadway Development Options' document, which examines potential development opportunities in the centre.

8.46 Loughton Broadway's ranking in 2008 was 1,247, which is a decline from 1,063 in 2003. It has good accessibility, and low vacancy rates, except for the recent closure of the large Woolworths store, which has affected centres nationally. Loughton Broadway has four of Goad's major retailers, including a rather small Sainsbury's store (678 sqm net).

8.47 The 2008 Development Options document describes a number of opportunity sites in the centre. We are aware that there is generally stakeholder support for an improvement in the supermarket offer and for a general improvement to the mix of retail uses in the centre and in particular the introduction of a retail brand (i.e. a major national multiple) to the centre. For this to be achieved, any new development will have to include units of a sufficient size to attract major retailers.

8.48 Since the centre is currently towards the bottom of the district wide town centre hierarchy, we consider that a 'no significant change' option is entirely appropriate. However, Loughton Broadway is the only centre in the district that has well advanced negotiations for growth and, combined with the extensive Council owned land in the centre, this points towards the delivering of additional floorspace as being a reasonable option. We have outlined our two options in Table 8.10.below.

Table 8.10 Options for the future of Loughton Broadway

Options	Key Potential Characteristics
Option 1: No Significant Change	▪ There is a potential for further decline in retail rankings, with potential short term increases in the vacancy rate ▪ There could be a dilution on the retail offer, with A2-A5 uses becoming more prominent over time ▪ The retail function of the centre will continue to be limited
Option 2: Modest Redevelopment and Elevation of Centre in Hierarchy	▪ A modest expansion, improving the retail and leisure offer will potentially elevate the centre in the hierarchy to a district centre ▪ Provision of further retail and leisure floorspace can encourage linked trips between the new uses and existing businesses and retain a greater proportion of expenditure ▪ New development can be used to fund improvements in local infrastructure and environmental improvements.

Source: RTP Recommendations

Development Potential

8.49 The Development Options document estimates that the opportunity sites could accommodate over 6,000 sqm (gross) retail, leisure and commercial floorspace. Our assessment reflects this scope for additional floorspace and our potential strategy is included at **Table 8.11** below.

Table 8.11 Potential Long Term Strategy Outcome for Loughton Broadway

	2009- 2016	2009- 2021	2009- 2031
A1 comparison sqm gross	2,700	4,300	7,600
A1 convenience sqm gross (superstores/supermarkets)	1,900	2,500	3,700
A1 convenience sqm gross (small foodstores/deep discounters)	0	0	0
A1 service/A2 sqm gross	300	400	800
A3, A4 and A5 sqm gross	200	500	1,200
Total sqm gross for A1-A5 uses	5,100	7,700	13,300

Source: RTP Strategy based on the district-wide outputs from Table 8.2

8.50 Focusing on the requirement to 2021, we have estimated that a total floorspace of 7,700 sqm (gross) of A1-A5 uses could be accommodated within Loughton Broadway, including some 4,300 sqm (gross) of comparison floorspace. Loughton Broadway currently has 10,440 sqm (gross) of A1-A5 uses, including some 3,540 sqm (gross) of comparison floorspace. In respect of foodstores, we have allowed for a further 2,500 sqm of convenience floorspace which would enable either an expansion or replacement of the existing Sainsbury's store to improve the foodstore offer in the town centre. If this strategy was implemented, there would be a significant change in the floorspace provision within Loughton Broadway in the plan period.

Spatial Proposals

8.51 A plan of Loughton Broadway is attached at Appendix 9. This includes a series of 'development opportunity sites' which have been adapted from the Development Options document. The largest of these sites is the Site 2 'Sainsbury's supermarket, shopping precinct and BP petrol station' (0.7 ha). If Option 2 as above is preferred as a basis for LDDs, we suggest the following inputs when considering the development potential of these sites:

- There is potential for the redevelopment of the sites in Loughton Broadway for a mix of uses to include up to 7,700 sqm (gross) of A1-A5 uses;
- Development could include an expanded or redeveloped Sainsbury's store to improve the shopping offer;
- Every opportunity should be taken to provide for larger unit sizes in any (re)development to enable a national multiple to anchor a new scheme; and
- Any new development should be well integrated with the remainder of the town centre, ensuring a successful retail circuit and integration with the underground station.

Summary of Recommended Strategy for Loughton Broadway

8.52 Loughton Broadway has arguably the most scope for redevelopment of the six centres within the district. It is currently one of the smallest centres, although the Sainsbury's site provides a real opportunity for growth. Other sites identified as part of the Development Options document can also contribute to expanding the centre's retail and leisure offer. Whilst Option 1 would not necessarily lead to a decline in the vitality and viability of the centre, it is our recommendation that further development - of up to 7,700 sqm gross A1-A5 floorspace by 2021, alongside an elevation of the centre in the hierarchy - is the appropriate strategy for this centre.

Chipping Ongar

Context and Reasonable Options for Chipping Ongar

8.53 Chipping Ongar is currently designated as a smaller centre. We recommend this designation is changed to a small district centre, consistent with PPS4 definitions. It is located to the east of the district surrounded by an extensive rural catchment. It is ranked 2,608 in 2008 by the MHE Index and has only two of the Experian Goad major retailers, namely Sainsbury's in the centre itself and a Tesco Express on the edge of the centre. It has limited accessibility by public transport, but has a pleasant environment, a low vacancy level and generally low crime levels.

8.54 In light of the size of Chipping Ongar and its position in the existing hierarchy and our suggested hierarchy, we consider there is limited scope for any major growth. The centre generally performs well in its role as a rural centre and we have not identified any significant development opportunity sites. The stakeholder consultation did not suggest any support for significant change. However, should any sites come forward in the plan period we have outlined a 'no new development' option alongside a 'small scale development' option, as outlined in **Table 8.12** below.

Table 8.12 Options for the future of Chipping Ongar

Options	Key Potential Characteristics
Option 1: No New Development	▪ The centre will continue in its role as a small centre serving a wide, largely rural catchment ▪ There will be a regular 'churn' of retailers, although the centre will remain an attractive destination for local residents.
Option 2: Small Scale Development	▪ Should sites come forward, there is an opportunity for limited in-fill development, potentially to introduce a second supermarket operator to compete with Sainsbury's ▪ Small scale new development could improve the urban fabric and provide units to accommodate new operators within the centre.

Source: RTP Recommendations

Development Potential

8.55 Although we have identified limited potential for growth in Chipping Ongar, we have considered a potential outcome that includes a small uplift in floorspace and would contribute to the small scale developments as envisaged under option 2. This potential outcome is outlined in **Table 8.13** below.

Table 8.13 Potential Long Term Strategy Outcome for Chipping Ongar

	2009- 2016	2009- 2021	2009- 2031
A1 comparison sqm gross	300	500	1,000
A1 convenience sqm gross (superstores/supermarkets)	0	0	0
A1 convenience sqm gross (small foodstores/deep discounters)	1,800	2,400	3,600
A1 service/A2 sqm gross	100	200	400
A3, A4 and A5 sqm gross	100	300	600
Total sqm gross for A1-A5 uses	2,300	3,400	5,600

Source: RTP Strategy based on the district-wide outputs from Table 8.2

8.56 Applying this potential outcome to Chipping Ongar and focusing on the requirement to 2021, we have estimated that a total floorspace of up to 3,400 sqm (gross) of A1-A5 uses could be accommodated within the centre, including some 500 sqm (gross) of comparison floorspace and 2,400 sqm for a small foodstore or a deep discounter. Chipping Ongar currently has 7,607 sqm (gross) of A1-A5 uses including some 1,928 sqm (gross) of comparison floorspace and 2,684 sqm (gross) of convenience floorspace.

Summary of Recommended Strategy for Chipping Ongar

8.57 Chipping Ongar is one of the smallest of the six centres we have assessed, a point that is recognised within the existing hierarchy of centres and our recommendation. The centre is currently performing reasonable well, although there are some vacancies and indicates in the future the centre might be under threat. There is potential for further development, in particular for convenience floorspace. If a suitable site comes forward we recommend that development is encouraged, subject to the development being of a scale commensurate with the centre's role in the hierarchy. A central aim of the LDF should be to include policies to ensure that Chipping Ongar maintains its vitality and viability.

Buckhurst Hill - Queens Road (East)

Context and Reasonable Options for Buckhurst Hill - Queens Road (East)

8.58 Buckhurst Hill is the smallest of the six centres we have assessed. It is currently designated as a district centre and we recommend that this is changed to a small district centre. In 2008 Buckhurst Hill was ranked 2,779 in the MHE Index. It has a few vacancies and its only Goad major retailer is Waitrose. The centre does however have a number of independent stores, including specialist fashion retailers. Buckhurst Hill is located in the south western corner of the district and is on the edge of Greater London. It consequently has good accessibility, with an underground station nearby.

8.59 As with Chipping Ongar, we consider that there is limited scope for any major development within the centre. We did not identify any specific development opportunities, due at least in part to the fact that the centre is surrounded by fairly dense residential uses. Our options for Buckhurst Hill are set out in **Table 8.14** below.

Table 8.14 Options for the future of Buckhurst Hill

Options	Key Potential Characteristics
Option 1: No New Development	▪ The centre will continue in its role as a specialist small centre. ▪ There will be a regular 'churn' of retailers, although the centre will remain an attractive destination for locals.
Option 2: Small Scale Development	▪ Should sites come forward, there is an opportunity for limited in-fill development. ▪ Small scale new development could improve the urban fabric and provide units to accommodate new operators within the centre.

Source: RTP Recommendations

Development Potential

8.60 Although we have identified limited potential for growth in Buckhurst Hill, we have considered a potential outcome that includes a small uplift in floorspace. This would contribute to the small scale developments as envisaged under Option 2. This potential outcome is outlined in **Table 8.15** below.

Table 8.15 Potential Long Term Strategy Outcome for Buckhurst Hill

	2009- 2016	2009- 2021	2009- 2031
A1 comparison sqm gross	300	500	1,000
A1 convenience sqm gross (superstores/supermarkets)	0	0	0
A1 convenience sqm gross(small foodstores/deep discounters)	0	0	0
A1 service/A2 sqm gross	100	200	400
A3, A4 and A5 sqm gross	100	300	600
Total sqm gross for A1-A5 uses	500	1,000	2,000

Source: RTP Strategy based on the district-wide outputs from Table 8.2

8.61 Our strategy to 2021 under Option 2 only allows for a small development of up to 1,000 sqm (gross) of A1-A5 uses, including, some 500 sqm (gross) of comparison floorspace. At present Buckhurst Hill has 9,937 sqm (gross) of A1-A5 uses, including 3,419 sqm (gross) of A1 comparison floorspace and 2,740 sqm (gross) of convenience floorspace. Thus the additional floorspace is relatively modest and reflects the centre's position in the retail hierarchy.

Summary of Recommended Strategy for Buckhurst Hill

8.62 Buckhurst Hill performs well in its role as a niche retail destination with a number of independent stores, including specialist clothing retailers. The centre is surrounded by a relatively dense residential area, whilst the Waitrose store meets the majority of local convenience needs. We consider that the centre already functions successfully and thus there is not necessarily any requirement for change during the plan period. However, Option 2 could be considered if a site comes forward that could accommodate small scale town centre uses that integrate with the existing town centre.

Growth Compared to Existing Position

8.63 For each centre, we have a suggested floorspace outcome. In aggregate, this includes a combination of A1-A5 floorspace. The following table summarises the percentage splits between the six centres in aggregate A1-A5 floorspace and the uplift on the existing floorspace within each centre.

Table 8.16 Quantitative Need compared to Existing Position

	Existing A1-A5 (sqm gross)	Existing A1-A5 (%)	Additional A1-A5 by 2016 (sqm gross)	Growth A1-A5 by 2016 from existing (%)	Additional A1-A5 by 2021 (sqm gross)	Growth in A1-A5 by 2021 from existing (%)
Epping	25,680	26%	8,100	32%	12,600	49%
Loughton High Road	33,590	34%	4,900	15%	7,400	22%
Waltham Abbey	11,245	11%	2,500	22%	3,900	35%
Loughton Broadway	10,440	11%	5,100	49%	7,700	74%
Chipping Ongar	7,607	8%	2,300	30%	3,400	45%
Buckhurst Hill	9,937	10%	500	5%	1,000	10%
Total	98,499	100%	23,400	24%	36,000	37%

8.64 Adopting the increasing market share scenario for both comparison and convenience floorspace will result in an increase of 24% of A1-A5 uses from the existing position across the district by 2016 and 37% by 2021. Although this is ambitious, if the district wishes to reduce expenditure leakage there needs to be investment in the existing floorspace stock to encourage more residents to shop locally and attract new operators to the centres.

Policy of Restricting Non-Retail Uses

8.65 Policy TC4 of the Local Plan Alterations 2006 states that planning permission will be granted for non-retail uses at ground floor level within key retail frontages, provided that it would not result in the non-retail frontage exceeding 30% and would not result in more than two adjacent non-retail uses, regardless of shop frontage width. The Alterations Proposals Maps show the key frontages within each of the centres we have assessed. These are also shown on the Town Centres Plans in Appendix 9.

8.66 PPS4 explains that primary frontages are likely to include a high proportion of retail uses (i.e. A1 uses) whilst secondary frontages provide greater opportunities for diversity of uses (i.e. other town centre uses, as defined in paragraph 7 of PPS4). Our terms of reference do not require us to assess the extent of the key retail frontages but we make some observations on this issue below.

Table 8.17 Key Frontages in Town Centres in May 2009

Centre	Retail Frontage Length (metres)	Length in A1 use class (metres)	% in A1 use class	Length in vacant uses (metres)	% in vacant uses
Epping	720	444	62	13	2
Loughton High Road	1,049	706	67	44	4
Waltham Abbey	234	153	65	8	3

Loughton Broadway	341	287	84	17	5
Chipping Ongar	255	191	75	8	3
Buckhurst Hill	329	194	59	17	5

Source: Local Plan Proposals Maps and RTP

8.67 A positive aspect of the policy is to ensure that the retail offer is not diluted and that the frontages in the centres are focused on A1 uses. There is, however, a potential negative aspect of the policy in that – contingent on market and other conditions – it could lead to long term vacancies or a predominance of lower order retail uses such as charity shops or A1 service uses (i.e. hairdressers and beauty salons).

8.68 Nevertheless, our observations from site visits and from our detailed healthcheck assessments indicate that the frontages policy is generally performing well and that there are no major gaps in the shopping frontages (see **Table 8.17** above). Throughout the six centres, there are few vacancies and the major ones that exist are part of the churn of national retailers or linked to the current downturn in the economy (e.g. Woolworths in Loughton Broadway). We expect such vacancies to be filled in time.

8.69 Lower order retail uses have the potential to cause a negative impact in some of the centres. For example, some centres have a higher number of charity shops and retail service uses than the national averages, and these numbers could increase further. We thus recommend the Council review the extent of the retail frontage. This could include the sub-division of primary and secondary frontages (consistent with advice in PPS4) and the relaxation of the policy for any new secondary frontages in order to encourage new non-retail operators (in particular higher quality A3/A5 food and drink leisure uses) to enter the market so as to provide a diversity of uses.

Monitoring

8.70 This study provides the Council with a set of floorspace requirements for the next 21 years, albeit with a caveat that limited weight should be afforded - in our view - to the final ten years of this timeframe. To establish whether the requirements for new floorspace (by type) are being met and more generally to monitor the performance of and changes to the main six centres in the district, the Council should monitor:

i) Town centre planning permissions - by type, amount (sqm gross and net) and location;
ii) Completions – by type, amount and location;
iii) Changes of use that occur without the need for express permission;
iv) Vacancies;
v) Charity uses (number and location); and
vi) Health checks.

8.71 The monitoring recommended above is relatively straightforward and should be conducted on a rolling basis for items (i) and (ii) and annually or every two years for items (iii) to (vi). Time series data can thus be produced and continually updated, starting with this study or possibly with earlier work undertaken by the Council. Contingent on the timetabling of the Council's key development plan documents, such updating will prove to be valuable when this evidence is tested at examination in public.

8.72 The options and recommendations set out in this report may need to be adjusted, in the future, due to changing market conditions, demographic changes and the impact of developments elsewhere. They may also need to be adjusted if standard assumptions, in particular those relating to expenditure growth and e-tailing, change. The role of monitoring is crucial in highlighting changes in the assumptions that underpin this study and we recommend regular monitoring to the Council.

8.73 Finally, we are aware that the Council has not finalised its options for locations for housing growth within the district. This potentially could influence the scale and location of our zonal population projections and thus if there is a major strategic decision on the location of a significant amount of housing growth during the plan period, then we suggest a review of both the quantitative outputs and the recommended strategies within this study.