

1 INTRODUCTION

Terms of Reference

- 1.1 Roger Tym & Partners (RTP) were instructed in March 2009 to undertake a town centres study for Epping Forest District Council (EFDC). In this report the geographical area of EFDC is referred to as either 'Epping Forest' or 'the district'. The majority of the fieldwork was undertaken in May 2009.
- 1.2 This study will form an important element of the evidence base for EFDC's Local Development Framework (LDF) and it will inform the preparation of Development Plan Documents (DPDs). The Consultancy Brief is attached at **Appendix 1**. As set out in the brief and agreed at the inception meeting, the terms of reference for this study are as follows:
- i) Provide a 'health check' for the six identified centres (namely Epping, Loughton High Road, Waltham Abbey, Loughton Broadway, Chipping Ongar and Buckhurst Hill), including an assessment of current floorspace, vacancy rates, rent levels and range of goods available.
 - ii) Assess the current role and function of centres, if necessary recommend change of position in hierarchy;
 - iii) Assess the shopping patterns for the six centres, taking into account both type and amount of spend in these centres, as well as other centres;
 - iv) Consider future demand within centres - link to population growth and economic conditions, up until 2021 and where possible provide indications up until 2031;
 - v) Identify potential opportunities for development or enhancement, including identifying the capacity of sites for different town centre uses. Provide aggregate capacity figures on a town centre basis;
 - vi) Assess current policy on restricting non-retail uses; identify impacts on vitality and viability - provide basis for policy change, if required;
 - vii) Consultation and engagement at appropriate stages throughout the research with relevant parties, such as the Town Centre Partnerships, traders associations, relevant town and parish councils and Epping Forest's Elected Members; and
 - viii) Assess the need for commercial leisure uses in the district up until 2021 and where possible provide indications up until 2031.

Context

Epping Forest District

- 1.3 Epping Forest is located to the north of Greater London on the edge of its metropolitan area. Much of the district is rural and sparsely populated with a network of towns and villages set within the countryside. At its southern extremes the district has suburban characteristics with a high density of population surrounding Loughton High Road and Buckhurst Hill.

- 1.4 Due to its proximity to London and its good transport connections, the district is subject to intense pressure for development. This pressure has been resisted since the majority of the district (94%, with the exception of the main settlements) forms part of the Metropolitan Green Belt.

Town Centre Feasibility Studies

- 1.5 Three feasibility studies were undertaken in 1998 for Loughton High Road, Loughton Broadway and Buckhurst Hill. The key recommendations in the Loughton High Road enhancement scheme include:
- the pedestrianisation of Brooklyn Parade and Centric Parade;
 - the enhancement of the streetscape along the full length of the High Road;
 - the installation of traffic calming features and features enhancing pedestrian safety.
- 1.6 The Loughton Broadway feasibility study recommended that:
- traffic circulation be adjusted to ease congestion;
 - a CCTV system be installed to cover The Broadway;
 - the central reservation be removed;
 - improvements such as a new square, lighting system and signage be implemented; and
 - The Broadway be made more pedestrian friendly.
- 1.7 Also applicable to Loughton Broadway is the 'Debden Town Centre and Broadway Development Options' report that was completed in 2009. Similar to the feasibility studies outlined above, it identifies several priorities for The Broadway. These include improved pedestrian and vehicular access to the Debden tube station; the integration of the tube station with a new, improved bus interchange, to promote the use of public transport; and public realm and parking improvements.
- 1.8 The central reservation has been retained, but completely redesigned - it remains a very strong and obvious feature in this centre. This has been accompanied by a makeover of footpaths and carriageways to improve the environment of the centre.
- 1.9 The Buckhurst Hill Feasibility Study recommended that:
- traffic circulation be adjusted to ease congestion;
 - parking issues be addressed, including the provision of more on-street parking; and
 - the lower part of Queens Road made more pedestrian friendly, to encourage shoppers to visit a range of shops in the town centre.
- 1.10 Suitable parking remains a challenge for Buckhurst Hill. However, works have been undertaken to improve the street environment.
- 1.11 Historically, attempts have been made to improve the vitality and viability of three of the district's town centres. In the case of Loughton Broadway there has been a more recent study that focused on encouraging development within the centre. The challenge for the LDF will be to encourage the delivery of improvements to the town centres. This study provides one of the first steps by providing a robust evidence base to inform the options for the Council's DPDs.

2012 Olympics at Broxbourne

- 1.12 The Olympics will have an influence on the district through the development of the nearby Broxbourne White Water Canoe Centre, (albeit outside EFDC) which is a short distance from Waltham Abbey. After the Games, the venue will create a major leisure attraction for canoeing and white water rafting. This development will provide an added attraction during the plan period, drawing visitors to the area. There is a potential to build upon this unique opportunity through spin-off trips to Waltham Abbey.

Town Centres Study

- 1.13 This study addresses the six main centres in the district, namely Epping, Loughton High Road, Waltham Abbey, Loughton Broadway (known locally as Debden or 'The Broadway'), Chipping Ongar and Buckhurst Hill. The findings for the six centres are reported in the same order throughout. They are relatively small centres (compared to higher order regional centres outside the district) and form a network of centres with other local centres within the district.
- 1.14 The district is surrounded by higher-order centres such as Harlow and Chelmsford to the north and east and Romford to the south. Basildon is also an important centre located to the south-east of the district. The challenge for this study is to examine the role and function of the district's six centres vis-à-vis higher order centres outside the district and to provide an indication of need and opportunities for development.

Report Structure

- 1.15 The report has been divided into three volumes as follows:
- **Volume 1:** Report (this document)
 - **Volume 2:** Study Appendices (numbers 1-9)
 - **Volume 3:** NEMS Visitor Survey Results
 - **Volume 4:** NEMS Household Survey Results
- 1.16 The remainder of this report (Volume 1) is structured as follows:
- **Section 2** (pages 5-8) explains the requirements of national and regional policies in so far as they relate to town centres;
 - **Section 3** (pages 9-31) provides health checks of six main centres in the district;
 - **Section 4** (pages 33-40) outlines our analysis of the visitor survey findings;
 - **Section 5** (page 41-56) outlines our analysis of the current patterns of retail and leisure spending, drawing on the telephone survey of households;
 - **Section 6** (page 57-77) provides our analysis of quantitative and qualitative needs in the retail sector (to 2021 with indications to 2031);
 - **Section 7** (79-85) contains our analysis of quantitative and qualitative needs in the leisure sector;
 - **Section 8** (pages 87-107) sets out our overall conclusions and recommendations to the Council.
 - A **Glossary** of key technical terms (page 109) is also provided.

1.17 Section, appendix and table cross referencing is shown in **bold** when first mentioned in each section.