

## 3 TOWN CENTRE HEALTH CHECKS

### Introduction

- 3.1 The town centre health checks have involved an appraisal of each centre in relation to the key indicators of vitality and viability in Annex D of PPS4. The majority of the data was collected in May 2009 and consequently prior to the publication of PPS4. However the indicators have not significantly changed from those in PPS6. The appraisal of each centre has involved:
- On-foot surveys;
  - Desktop research in order to benchmark the centres against a range of comparator centres;
  - Consultation with key stakeholders.
- 3.2 In this section, the performance of each centre against indicators of vitality and viability is analysed. These indicators closely reflect the advice provided in Annex D of PPS4. The sources of the data and the key technical outputs are provided in **Appendix 2**. The approach to stakeholder consultation and the key outputs from this exercise are explained in **Appendix 3**.
- 3.3 The existing status of the six centres assessed, as defined by Management Horizons Europe Index 2008 (MHE Index) is presented at **Table 3.1** below. The MHE Index is used since it benchmarks the majority of centres within the UK and enables time series data analysis on their ranking and function.

**Table 3.1 Epping Forest town centre rankings**

Town Centre	MHE Function 2008	MHE Market Position	MHE Ranking 2008	MHE Ranking 2003/2004	MHE Ranking 2000/2001
Epping	Minor District	Middle	896	829	739
Loughton High Road	District	Middle	522	524	470
Waltham Abbey	Local	Middle	1,590	-	-
Loughton Broadway	Local	Middle	1,247	1,063	828
Chipping Ongar	Minor Local	Middle	2,608	-	-
Buckhurst Hill	Minor Local	Upper Middle	2,779	-	-

Source: MHE Index (2008). 6,721 locations are ranked, with number 1 at the top of the ranking.

- 3.4 The MHE Index 2008 ranks some 6,721 locations. This is much higher than the earlier versions of the MHE Index that only ranked 1,672 locations. Therefore, limited conclusions can be drawn from the ranking of lower functioning centres (i.e. Waltham Abbey, Chipping Ongar and Buckhurst Hill) that did not appear within the earlier indices. However, the time series data for the larger centres can provide a broad indication of the ranking trend as we do not anticipate there will have been any additional larger centres added to the index.

## Epping

### *Retail Rankings*

- 3.5 The MHE Index ranks Epping at 896 representing a decline of 67 places since 2003-2004. There is likely to be a variety of reasons why the ranking has declined. Towns and major shopping centres are rated using a weighted scoring system which takes account of each location's provision of retailers and anchor store strengths. Although we have no time series data on the composition of Epping's retailers, we expect the main reasons that the ranking has declined is due to investment in the retail stock in other centres and the change in composition in Epping itself. The MHE Index also identifies Epping as 'minor district centre' with a 'middle market' position.

### *Diversity of Uses*

- 3.6 **Table 3.2** below provides the diversity of uses for Epping in May 2009. This shows the floorspace by use class and the percentage breakdown compared to the national average. The percentages quoted in the text throughout this section for all centres represent the percentage of floorspace in each centre. The approach used to breakdown the floorspace and the detailed tabulations by operator type and Goad category are included at Appendix 2.

**Table 3.2 Epping diversity of uses in May 2009**

Use Class	Units	Floorspace (sqm)	Floorspace (%)	UK Average (%)
A1 Convenience	15	6,140	25.00	16.65
A1 Comparison	73	11,180	45.52	51.14
A1 Services	19	1,710	6.97	4.91
A2 Financial & Professional Services	15	1,890	7.70	7.68
A3 & A5 Restaurants, cafes & hot food takeaways	25	3,030	12.34	9.16
Miscellaneous	0	0	0.00	1.12
Vacant	3	610	2.48	9.34
<i>Sub-Total Experian Retail</i>	<i>150</i>	<i>24,560</i>	<i>100.0</i>	<i>100.00</i>

<b>Other floorspace</b>				
A4 Drinking Establishments	5	1,120	-	-
B1 Business	19	7,280	-	-
D1 Non-Residential Institutions	11	3,300	-	-
D2 Assembly and Leisure	3	660	-	-
Vacant Units	6	1,980	-	-
Sui Generis	3	130	-	-
<i>Sub-Total Other Uses</i>	<i>47</i>	<i>14,470</i>	<i>-</i>	<i>-</i>
<b>GRAND TOTAL</b>	<b>197</b>	<b>39,030</b>	<b>-</b>	<b>-</b>

Source: Appendix 2 (floorspace data is from Experian Goad and accurate as far as possible at May 2009)

- 3.7 This demonstrates that the comparison goods sector in Epping (i.e. non-food goods) accounted for 45.5% of the existing floorspace and was slightly below the national average of over 50%. This is to be expected since Epping has a lower function when compared to nearby higher order centres.
- 3.8 Looking at the comparison uses in more detail at Appendix 2, in May 2009 Epping had eight units in the 'furniture, carpet and textiles' category (5.7%), nine units in the 'booksellers, arts/crafts and stationery' category (4.7%) and eight units in the 'chemists, toiletries and opticians' category (6.6%). All these uses are just above the Goad national average for floorspace composition. Although small in floorspace, there were four units in the 'florists and garden' category (1.3%) in Epping, slightly higher than the national average of 1%.
- 3.9 Out of a total of six units in the 'charity shops, pets and other comparison' Goad category (4%), there were five charity shops in Epping. The charity shop operators were two Cancer Research UK shops, Oxfam, St Clare Hospice, and Sue Ryder Care. This category in total represents 4% of the Epping floorspace, compared to a national average of 3.7%.
- 3.10 Convenience goods floorspace (i.e. food and grocery) represented 25% of the floorspace in Epping and was higher than the national average of 16.7%. The centre includes a Tesco store (2,760 sqm gross) and a Marks and Spencer Simply Food (1,640 sqm gross). Some smaller-scale convenience units include a Shell Select store (40 sqm gross), a Holland and Barrett store (300 sqm gross) as well as bakers, confectioners and newsagents.
- 3.11 The 'restaurants, cafes, coffee bars, fast food and take-aways' category occupied 23 units in Epping (2,840 sqm gross). This represents 12.3% of the total floorspace and is higher than the national average of 9.1%. There was also a high representation of units within the 'hairdressers, beauty parlours and health centres' category, representing 5.5% of comparison compared to 3.5% nationally.

### *Presence of National Multiples and Major Retailers*

- 3.12 A multiple retailer is defined as being part of a network of nine or more outlets (see Appendix 2). In the UK, 30 national multiples have been identified as 'major retailers' by Experian Goad, i.e. those retailers most likely to improve the consumer appeal of a centre. Compared to other centres in the district, Epping has a high representation of such retailers including Boots, Next, Marks and Spencer, Tesco and Superdrug.

### *Operator Demand*

- 3.13 Information from the FOCUS property database is included at Appendix 2 and shows that in May 2009 there were 17 requirements for floorspace in Epping. Some of these are from charity shops and value retailers. However notable retail requirements include those from The Body Shop (74-186 sqm), Superdrug looking for a larger store (186-557 sqm), Monsoon Accessorize Ltd (56-200 sqm) and Lakeland Ltd (279-465 sqm). There was also demand from Café Rouge Ltd (232-325 sqm) a popular higher order national restaurant chain. The presence of this demand from recognised national retailers and operators is encouraging and indicates investor confidence in the centre.

### *Retail Property Offer*

- 3.14 Epping is a linear centre with the majority of commercial units located along the High Street. It comprises mostly smaller to medium size stores (up to 600 sqm gross) with very few larger-format retail units. Alongside the smaller units there is a larger Tesco Store (2,760 sqm gross) at the southern end of the High Street and a Marks and Spencer (1,640 sqm gross) at its northern end. Other than these two stores, there is no other unit larger than 600 sqm (gross). This lack of larger units limits the scope for the centre to respond to demand by new operators.
- 3.15 There is also an outdoor market on the High Street every Monday with more than 80 stalls, as well as a Farmers' market on the first Friday of each month (from 9 am to 1pm). These markets bring more people into the centre and add to the diversity of the retail offer, as well as the viability of the town centre.

### *Retail Yields*

- 3.16 The definition of a retail yield is included at Appendix 2 (para 17 Commercial Yields) alongside the data available for the district's centre. Yields measure the ratio of rental income to capital value (i.e. the return on investment) and are expressed in terms of the open market rents of a property as a percentage of its capital value. These data are based on the Valuations Office Report of July 2008. For Epping, the yields have generally been constant (and mostly overlapping), varying between 6.75% and 6.25%. In July 2008 Epping yields decreased to 5.75% and this indicates investor confidence in the centre. However, it is likely that the yields would have increased again since this date due to the downturn in the economy.

### *Changes in Prime Zone A Shopping Rents*

- 3.17 Retail rents data are included at Appendix 2. The Epping average was £431 per sqm per annum, between 2000 and 2002. Since then there has been a steady increase up to £646 per sqm per annum in 2007. Nearby higher order centres experience much higher

average annual rents, yet their rates of increase are quite similar to the rates of the district's town centres for the period 2000 to 2007.

### *Proportion of Vacant Street Level Property*

- 3.18 In May 2009 there were three vacant units in Epping representing 2% of all units. This was a very low vacancy rate compared with the national average of 11.7%. The units vary in size - from 70 sqm to 440 sqm. However, we noted that there were also six vacant non-retail units (1,980 sqm). Generally, the centre is well let and short-term vacancies can assist in the 'churn' of occupiers and enable new retailers to enter the market.

### *Pedestrian Flows*

- 3.19 Pedestrian flow data provide the most basic measure of the number of visitors to a shopping centre. The number of visitors may be translated into potential economic transactions and therefore this indicator gives some idea of the vitality of a place.
- 3.20 No empirical pedestrian flow data are available for Epping. However, when visiting the centre we observed pedestrian movements. Our site visit to Epping was undertaken on a Thursday morning in April on an overcast day. Despite the weather there was still a steady pedestrian presence along the High Street.
- 3.21 The market in Epping is located on the central/northern High Street and creates significant footfall along the eastern side of the street between St John's Church and the EFDC offices.

### *Accessibility*

- 3.22 Epping is well connected to London with a regular underground service; it is the last stop on the Central Line. The station is some 0.8 km (approximately a five minute walk) from the High Street. There are also 16 bus services linking Epping to the other five centres in the district as well as Chelmsford, Harlow, Romford and London.
- 3.23 There is good parking provision for private car users throughout the centre - the main car parks are Bakers Lane (141 spaces), Civic Offices (28 spaces short stay) and Cottis Lane (213 spaces). In May 2009, the parking charges that applied throughout the district were £0.65 for up to an hour; £2.80 for up to 3 hours; and £9.00 for staying over 3 hours.
- 3.24 A problem has been identified connected with commuter parking along the residential streets near the Epping underground station. However this does not detract from the good accessibility the station has for the town centre.

### *Crime and Safety*

- 3.25 According to the Essex Police, Epping's crime levels are average for the district. They have increased by 12.6% from 40 to 45 incidents for the three month period of April - June 2008 to April - June 2009.
- 3.26 There is CCTV in operation around the Epping car parks but not along the High Street. The Council has received reports of pickpockets on Monday markets and some low-level vandalism on the public footpaths. There have been some evening economy problems in Epping most notably licensing and public order relating to Club 195.

### *State of Town Centre Environmental Quality*

- 3.27 Epping's retail activity is concentrated along the High Street. There are both traditional and modern buildings present on the High Street. Shop frontages along both sides of the street are generally well-kept. A steady stream of vehicle traffic along the High Street was observed. However this is accompanied by good provision for pedestrian movement, including signals and zebras crossings in convenient locations, as well as wide footpaths.

### *Summary of Epping*

- 3.28 Epping is designated as a principal centre in the Epping Forest District Local Plan. Based on PPS4 definitions, it is recommended that Epping is designated a 'town centre' since it is an important market town and service centre and provides a range of facilities and services. The health check has found the following:
- i) Its retail ranking has declined in the last five years.
  - ii) The diversity of uses is broadly in line with national averages.
  - iii) There is a good representation of national retailers.
  - iv) There is a high level of operator demand with 17 requirements.
  - v) Vacancies are low, retail yields are constant and retail rents have been improving.
  - vi) There is a popular weekly market as well as monthly farmers' markets.
  - vii) The environmental quality of the centre is good.

## **Loughton High Road**

### *Retail Rankings*

- 3.29 The MHE Index ranked Loughton High Road at 522 in 2008 and this is a slight improvement of two places since 2003. The MHE Index also identifies Loughton High Road as a 'district centre' with a 'middle market' position (see Table 3.1, page 9).

### *Diversity of Uses*

- 3.30 **Table 3.3** includes the diversity of uses for Loughton High Road; the full detailed data are provided at Appendix 2.

**Table 3.3 Loughton High Road diversity of uses in May 2009**

<b>Use Class</b>	<b>Units</b>	<b>Floorspace (sqm)</b>	<b>Floorspace (%)</b>	<b>UK Average (%)</b>
A1 Convenience	11	9,670	30.01	16.65
A1 Comparison	94	10,830	33.61	51.14
A1 Services	26	2,380	7.39	4.91
A2 Financial & Professional Services	26	3,530	10.96	7.68
A3 & A5 Restaurants, cafes & hot food takeaways	28	4,350	13.50	9.16
Miscellaneous	0	0	0.00	1.12
Vacant	9	1,460	4.53	9.34
<i>Sub-Total Experian Retail</i>	<i>194</i>	<i>32,220</i>	<i>100.00</i>	<i>100.00</i>

<b>Other floorspace</b>				
A4 Drinking Establishments	6	1,370	-	-
B1 Business	14	3,840	-	-
D1 Non-Residential Institutions	11	3,740	-	-
D2 Assembly and Leisure	5	3,360	-	-
Sui Generis	2	130	-	-
<i>Sub-Total Other Uses</i>	<i>38</i>	<i>12,440</i>	<i>-</i>	<i>-</i>
<b>GRAND TOTAL</b>	<b>232</b>	<b>44,660</b>	<b>-</b>	<b>-</b>

Source: Appendix 2 (floorspace data is from Experian Goad and accurate as far as possible at May 2009)

- 3.31 In May 2009, the comparison goods sector in Loughton High Road accounted for 33.6% of retail floorspace and was lower than the national average of 50%. There were 16 units in the 'women's, girls, children's clothing' category (2.9%) and this is lower than the national average of 4.7%.
- 3.32 There were 13 units in the 'chemists, toiletries and opticians' category representing 5.0% of the floorspace compared to the national average of 4.1%. There was a low representation of only one unit in the 'sports, toys, cycles and hobbies' category (0.7%) compared to the national average of 2.4%.
- 3.33 There were five units in the 'charity shops, pets and other comparison' category (2.3%) including four charity shops namely Cancer Research UK, PDSA (People's Dispensary for Sick Animals), Sense, and Sue Ryder Care. This proportion is broadly consistent with the national average of 2.5%.
- 3.34 Convenience goods outlets accounted for 30.0% of retail floorspace and this is much higher than the 16.7% national average. The reason is the larger size of the convenience outlets including Morrison's (3,370 sqm), Marks and Spencer (1,300 sqm) and Sainsbury's (4,150 sqm).

#### *Presence of National Multiples and Major Retailers*

- 3.35 Loughton High Road benefits from a range of national multiples and major retailers including Boots, WH Smiths, Superdrug, Sainsbury's, Morrisons, Marks and Spencer and Dorothy Perkins.

#### *Operator Demand*

- 3.36 In May 2009, there were 20 requirements for presence in the centre. This is slightly higher than Epping and includes some identical retailers such as The Body Shop and Monsoon Accessorize Ltd; this suggests these operators are seeking representation in the district generally rather than specifically Epping or Loughton High Road. Other notable national operator demand includes Argos (929 to 1,486 sqm), Caffe Nero (74 to 186 sqm), Phones 4 U (56 to 139 sqm) and Strada (255 to 464 sqm).

### *Retail Property Offer*

- 3.37 The retail offer is focused on the High Road itself. It includes independent shops, as well as national multiples, cafés, restaurants and pubs. Other uses such as offices and community activities are also present. Retail units in Loughton vary from modern supermarket units such as the Sainsbury's to older smaller units typically occupied by independent operators. In terms of floorspace, the majority of units vary between 20 sqm and 560 sqm (gross).
- 3.38 Many of the larger format stores, such as Superdrug, WH Smiths and New Look are located on the northern side of the High Road, in the area known as Centric Parade. Sainsbury's is one exception - located in the southern end of the centre, on Old Station Road. There are also a series of smaller streets linked to Loughton High Road, namely Forest Road, Church Hill and Old Station Road. These streets are characterised by smaller retail units (with the exception of Sainsbury's) and a number of independent occupiers.
- 3.39 There are three large foodstores in Loughton High Road, namely Morrison's (the former Safeway store) (3,370 sqm gross), Marks and Spencer Simply Food (1,300 sqm gross) and Sainsbury's (4,150 sqm gross). The Sainsbury's store is a modern outlet that opened in 2003.

### *Retail Yields*

- 3.40 For Loughton, yields have generally been constant between 6.25% and 6.5%. In July 2008 the yield for Loughton was some 6.5% (see commentary in paragraph 3.16 for explanation of retail yields). This is a moderate yield and very similar to Epping, however we expect that this will have increased since this date due to the downturn in the economy.

### *Changes in Prime Zone A Shopping Rents*

- 3.41 Retail rents data are included at Appendix 2. Similar to Epping, the Loughton High Road average was £431 per sqm per annum between 2000 and 2002. Since then there has been a steady increase up to £700 per sqm per annum in 2007.

### *Proportion of Vacant Street Level Property*

- 3.42 In May 2009, there were nine vacant units in Loughton High Road accounting for 4.5% of floorspace compared to the national average of 9.3%. These units were between 90 sqm and 140 sqm in floorspace. In general, the level of vacancy rate was low and allows for the 'churn' of occupiers. However, due to the limited size of the vacant units there is limited opportunity to meet the demand from operators seeking larger space in the centre.

### *Pedestrian Flows*

- 3.43 The site visit to Loughton High Road was undertaken on a busy, sunny Monday afternoon in April 2009. There was a steady level of pedestrian movement on the High Road, with the pedestrian flows increasing in the late afternoon. Night-time attractions in the centre include pubs or bars and restaurants.



### *Accessibility*

- 3.44 Loughton High Road benefits from three car parks. The Sainsbury's car park has 270 spaces and there are 50 parking spaces at the Euro car park near Morrison's. The Traps Hill car park that is located at the northern end of the town centre includes 188 spaces. Additional parking is provided near the Wheatsheaf pub on York Hill, and between Morrison's and The Drive.
- 3.45 Loughton High Road can also be reached by the underground (Central Line) and bus. There are 20 different bus services, which connect Loughton High Road with Ilford, Waltham Cross, Walthamstow, Woodford Green, Woodford and other centres within the district.
- 3.46 Commuter parking has been identified as a problem in the centre. This was also identified as an issue in Epping but due to the more central position of the underground station in Loughton commuter parking could threaten opportunities to visit the centre.

### *Crime and Safety*

- 3.47 There have been some evening economy complaints around pubs and clubs along the High Road. In addition, EFDC has reported that safety can be an issue, especially in the evenings, around the Sainsbury's car park. Essex police report that crime levels in Loughton (as a combined area) are average, and increased by 0.4% or from 90.7 incidents to 91 incidents for the period of April - June 2008 to April - June 2009.

### *State of Town Centre Environmental Quality*

- 3.48 The High Road accommodates considerable through traffic, especially at school closing time. We also note that the High Road is also a key bus route. Due to this traffic, at peak times the environmental quality of the centre suffers and crossing the road can be difficult for pedestrians. Despite these problems, we note that there are wide pavements in parts of the centre and the High Road seems to be well maintained.

### *Summary of Loughton High Road*

- 3.49 Loughton High Road is designated as a principal centre in the Epping Forest District Local Plan alongside Epping. Based on PPS4 definitions, it is recommended that Loughton High Road is designated a 'town centre' due to the range and scale of shopping and other services offered. The health check has found the following:
- i) Its ranking is higher than Epping and has improved very slightly since 2003
  - ii) There is a relatively low proportion of comparison floorspace in the centre
  - iii) Correspondingly, the convenience floorspace proportion is well above the national average
  - iv) There is a good selection of national retailers, as well as a varied offer of independent shops
  - v) There are currently 20 requirements for new floorspace within Loughton High Road
  - vi) There are a low number of vacant units and the retail stock achieves relatively low yields and has benefited from increasing zone A rents in recent years
  - vii) There is good accessibility to the centre, although concerns have been raised over the safety of the centre at night

## Waltham Abbey

### Retail Rankings

- 3.50 The MHE Index ranked Waltham Abbey 1,590 in 2008; there are no time series data for this centre (see Table 3.1, page nine). The MHE Index also identifies Waltham Abbey as a 'local centre' with a 'middle market position'.

### Diversity of Uses

- 3.51 **Table 3.4** includes the diversity of uses for Waltham Abbey; the full detailed data are provided at Appendix 2.

**Table 3.4 Waltham Abbey diversity of uses in May 2009**

Use Class	Units	Floorspace (sqm)	Floorspace (%)	UK Average (%)
A1 Convenience	7	4,635	47.37	16.65
A1 Comparison	19	1,900	19.42	51.14
A1 Services	11	720	7.36	4.91
A2 Financial & Professional Services	6	690	7.05	7.68
A3 & A5 Restaurants, cafes & hot food takeaways	13	1,370	14.00	9.16
Miscellaneous	1	70	0.72	1.12
Vacant	4	400	4.09	9.34
<i>Sub-Total Experian Retail</i>	<i>61</i>	<i>9,785</i>	<i>100.00</i>	<i>100.00</i>
<b>Other floorspace</b>				
A4 Drinking Establishments	8	1,460	-	-
B1 Business	1	100	-	-
Sui Generis	2	100	-	-
<i>Sub-Total Other Uses</i>	<i>11</i>	<i>1,660</i>	<i>-</i>	<i>-</i>
<b>GRAND TOTAL</b>	<b>72</b>	<b>11,445</b>	<b>-</b>	<b>-</b>

Source: Appendix 2 (note that this data includes the Tesco store on Sewardstone Road, but excludes the units on Church Street, Greenyard or Leverton Way). Floorspace data is from Experian Goad and accurate as far as possible at May 2009.

- 3.52 In May 2009, comparison goods floorspace in Waltham Abbey was 19.4% of the total floorspace and was much lower than the 51.1% national average. There was only one unit in the 'women's, girls, children's clothing' category and no representation in the 'footwear and repair', 'men's and boys' wear', 'mixed and general clothing' and 'gifts, china and glass' categories. Despite this low representation, comparison goods are sold in the Tesco store on Sewardstone Road. The low comparison goods offer is linked to the existing function of the centre.

- 3.53 In May 2009, the convenience sector floorspace accounted for 47.7% of the floorspace and was higher than the 16.7% national average. This trend is due to the Tesco store located in the eastern end of the town centre. There were two butchers and the 'greengrocers and fishmongers' category is represented by one unit (namely the greengrocer).
- 3.54 In May 2009, service uses represented 7.4% of retail floorspace and was higher than the national average of 4.9%. Restaurants and cafes are especially well represented - they accounted for almost 14% of the floorspace compared to 9.1% nationally. Hairdressers and beauty salons were also well represented in Waltham Abbey accounting for 5.3% of the floorspace compared to 3.5% nationally.

#### *Presence of National Multiples and Major Retailers*

- 3.55 The only Goad 'major retailer' in Waltham Abbey is Tesco. The only other national multiples (not on the Goad list) are Lloyds Pharmacy and the Co-operative store on Sun Street. This is a low level of representation but is linked to the size of the centre.

#### *Operator Demand*

- 3.56 There are currently five requirements for floorspace in the centre. These are Barnardos (74 to 111 sqm), Travelodge (929 to 1,858 sqm), Subway (37 to 140 sqm), Pets at Home Ltd (279 to 1,115 sqm) and the British Red Cross (46 to 167 sqm). The Travelodge requirement may be the first indication of the influence of the Olympic Games on the district.

#### *Retail Property Offer*

- 3.57 The majority of retail units in Waltham Abbey are located around Market Square and along Sun Street. Many of the units are small independent shops, with some exceptions, such as Tesco to the east, the Co-operative supermarket, one bank (Barclays) is at the junction of Sun Street and Market Square; the other bank (HSBC) is in Highbridge Street. The reasonably small size of the centre (in terms of both total floorspace and the size of units) defines the nature of its occupants.

#### *Proportion of Vacant Street Level Property*

- 3.58 In May 2009 there were four vacant units in Waltham Abbey, accounting for 4% of retail units and this was lower than the national average of 11.1%. The vacant units were small to medium in size, with areas between 70 and 170 sqm.

#### *Pedestrian Flows*

- 3.59 The core of the Waltham Abbey centre along Sun Street is pedestrian only, with no vehicle access. The visit to the centre was undertaken on a rainy weekday afternoon in April 2009. There were limited numbers of people observed on the street during the visit, possibly due to the weather conditions.

#### *Accessibility*

- 3.60 The centre has a limited level of public transport accessibility. There are 10 bus routes which link the centre with the other five centres of the district, as well as Chingford Green, Nazeing, Sewardstone and Harlow.

- 3.61 There are three main car parks in Waltham Abbey. These are Cornmill (197 spaces); Darby Drive (69 spaces) and Quaker Lane (109 spaces).
- 3.62 Waltham Cross railway station is also located approximately 20-30 minutes walking distance from Waltham Abbey. However, this is not a very pleasant route for pedestrians and beyond a normal walking distance for shoppers.

### *Crime and Safety*

- 3.63 Waltham Abbey's crime levels are also average for Essex County and have decreased by 10.4 % from 137 to 123 incidents for the three month period of April to June 2008 to April to June 2009. Damage to shops and some restaurants in Sun Street has been reported to the Council.
- 3.64 We understand that there have been reported evening disturbances in the Tesco car park. Such problems are partially due to the lack of facilities for young people in Waltham Abbey. Such occurrences can lead to reluctance from local residents to visit the centre in the evening.

### *State of Town Centre Environmental Quality*

- 3.65 Waltham Abbey comprises a pleasant, pedestrianised retail core including Market Square and Sun Street. Sun Street forms a tightly enclosed, commercial core and includes a number of prominent listed buildings.
- 3.66 The Abbey, which is the main focal point of the town, is located to the north-west of the square, and forms part of the Waltham Abbey Conservation Area. The Abbey Gardens in particular represent an extremely significant part of the Conservation Area in terms of their archaeological interest. Thus Waltham Abbey has tourism potential, especially considering that it is also an important location in terms of access to the Lee Valley Regional Park.
- 3.67 The lack of vehicle access to Waltham Abbey's core contributes greatly to the environmental quality and ambience of the centre. On the other hand, this arrangement makes it more difficult for people to find their way in and out of the centre. Improved signposting has been planned for the centre in order to remedy this issue.
- 3.68 Shop frontages in Waltham Abbey are well maintained, with the exception of a small number of vacant shops. We consider that there is an adequate amount of street furniture commensurate with the centre's size, comprising benches, both on the square and along Sun Street.

### *Summary of Waltham Abbey*

- 3.69 Waltham Abbey is designated as a principal centre in the Epping District Local Plan. However, the centre does not fulfil the PPS4 definitions of a 'town centre' in Annex B. Due to the relatively localised offer in the centre, we recommend that Waltham Abbey is designated as a 'small district centre'. The health check has found the following:
- i) The retail offer is local in nature (other than the Tesco store) and comprises a number of small, independent shops.

- ii) There are few comparison goods retail units and the convenience offer is dominated by Tesco.
- iii) Other than Tesco, the majority of the retail offer in Waltham Abbey is located around Market Square and along Sun Street.
- iv) Accessibility to Waltham Abbey via public transport is limited to buses only.
- v) The core of the centre is pedestrianised and comprises Market Square and Sun Street. The restricted vehicle access to these areas enhances the pedestrian experience, as well as improving safety.

## Loughton Broadway

### *Retail Ranking*

- 3.70 The MHE Index ranked Loughton Broadway at 1,247 in 2008 and this is an improvement by 184 places since 2003. The MHE Index also identifies Loughton Broadway as a 'local centre' with a 'middle market' position (see Table 3.1, page 9).

### *Diversity of Uses*

- 3.71 **Table 3.5** includes the diversity of uses for Loughton Broadway; the full detailed data are provided at Appendix 2.

**Table 3.5 Loughton Broadway diversity of uses in May 2009**

Use Class	Units	Floorspace (sqm)	Floorspace (%)	UK Average (%)
A1 Convenience	12	3,180	31.55	16.65
A1 Comparison	22	3,540	35.12	51.14
A1 Services	8	760	7.54	4.91
A2 Financial & Professional Services	3	600	5.95	7.68
A3 & A5 Restaurants, cafes & hot food takeaways	7	750	7.44	9.16
Miscellaneous	1	20	0.20	1.12
Vacant	9	1,230	12.20	9.34
<i>Sub-Total Experian Retail</i>	<i>62</i>	<i>10,080</i>	<i>100.00</i>	<i>100.00</i>
<b>Other floorspace</b>				
A4 Drinking Establishments	1	360	-	-
B1 Business	1	140	-	-
D1 Non-Residential Institutions	3	340	-	-
D2 Assembly and Leisure	1	40	-	-
Vacant	1	90	-	-
Sui Generis	1	100	-	-
Sub-Total Other Uses	8	1,070	-	-

<b>GRAND TOTAL</b>	<b>70</b>	<b>11,150</b>	<b>-</b>	<b>-</b>
--------------------	-----------	---------------	----------	----------

Source: Appendix 2 (floorspace data is from Experian Goad and accurate as far as possible at May 2009)

- 3.72 In May 2009, the comparison goods sector in Loughton Broadway centre accounted for 33.6% of retail floorspace compared to the national average 51.1%. There were two charity shops in Loughton Broadway - Barnardos and the St Clare Hospice, both located on The Broadway.
- 3.73 The convenience goods sector was well represented in Loughton Broadway accounting for 31.6% of floorspace, compared with 16.7% nationally. This is dominated by the Sainsbury's store, but there are also two bakers, one butcher, two greengrocers and five off-licences and confectioners.
- 3.74 Service uses floorspace (7.4%) was almost double the national average of 4.9%. However, there is an absence of any units in the 'travel agents' and 'estate agents' categories.

#### *Presence of National Multiples and Major Retailers*

- 3.75 Loughton Broadway contains three major retailers, namely Boots the Chemist, Sainsbury's and Superdrug. In its retail core is a mix of national multiples and independents.

#### *Retail Property Offer*

- 3.76 The retail property offer for Loughton Broadway is focused along The Broadway, together with a parade of shops south of The Broadway along Torrington Drive, where the Sainsbury's store is located. The Broadway has relatively large format stores combined with smaller units. The former Woolworths unit (860 sqm) is the largest within the centre followed by the Iceland store (610 sqm).
- 3.77 The shopping area on Burton Road contains mainly smaller units. The only significant unit in terms of size is the Sainsbury's store (1,450 sqm gross) and has been operating from this location since 1969. This part of the centre is outdated in terms of its design and many of the surrounding units are vacant.
- 3.78 There is also a market on The Broadway every Thursday between 10 am and 3 pm, and this brings a higher number of visitors to the centre compared to a normal day.

#### *Proportion of Vacant Street Level Property*

- 3.79 In May 2009 there were nine vacant units in the centre representing 12.2% of the floorspace and this was higher than the national average of 9.3%. There were also two vacant units adjacent to the Sainsbury's store. However, The Broadway itself has very low vacancy rates and this figure would be zero but for the closure of the Woolworths store.

#### *Pedestrian Flows*

- 3.80 There are no recent pedestrian footfall data available for Loughton Broadway. The site visit to the centre was undertaken on a Monday afternoon and the centre was found to be

relatively quiet, which is not surprising for this time of day on a working day. At the time of the visit there were works underway to upgrade footpaths and carriageways within the town centre. These works will have affected pedestrian flows.

### *Accessibility*

- 3.81 The centre can be accessed by underground and bus. There are 20 different bus services which connect Loughton Broadway with Ilford, Waltham Cross, Walthamstow, Woodford Green, Woodford and other centres within the district.
- 3.82 There are an estimated 107 car parking spaces in the centre.
- 3.83 Footpaths within the centre are wide in some parts, and footpath capacity seems to easily deal with the number of pedestrians along The Broadway.

### *Crime and Safety*

- 3.84 There are no separate crime data for the two Loughton centres - High Road and The Broadway, from Essex Police. As explained in the Crime and Safety section for Loughton High Road above (para 3.47), crime levels in Loughton (as a combined centre) have increased by 0.4% for the period of April - June 2008 to April - June 2009, or from 90.7 incidents to 91 incidents.
- 3.85 It is understood that EFDC has plans to install CCTV cameras within the centre, to prevent nuisance caused by youths, hate incidents and more serious crime.

### *State of Town Centre Environmental Quality*

- 3.86 Loughton Broadway centre is much smaller and more compact than Loughton High Road. Most retail units are located on both sides of The Broadway, with some (including Sainsbury's) located on Torrington Drive.
- 3.87 The Broadway is open to vehicular traffic; however levels of congestion are not as high as these on Loughton High Road. This enhances the pedestrian experience along The Broadway. Environmental improvement works were completed in 2009 improving footpaths and carriageways in the centre.

### *Summary of Loughton Broadway*

- 3.88 Loughton Broadway is designated as a 'smaller centre' in the Epping Forest District Local Plan. Due to the relatively localised offer in the centre and the definitions of centres in Annex B of PPS4, we recommend that Loughton Broadway is designated as a 'small district centre'. The health check has found the following:
- i) It is a relatively small centre and only contains three of the major national retailers, namely Boots the Chemist, Superdrug and Sainsbury's.
  - ii) The centre contains a lower than average percentage of comparison goods floorspace and a higher percentage of convenience floorspace.
  - iii) In May 2009 the percentage of vacant floorspace in the centre was slightly higher than the national average, although this was influenced by the vacant Woolwoths store.
  - iv) It is accessible by both public transport and private vehicles, whilst its design enables convenient pedestrian movement through the centre.

## Chipping Ongar

### Retail Ranking

- 3.89 The MHE Index ranked Chipping Ongar 2,608 in 2008; there are no time series data for this centre (see Table 3.1, page 9). The MHE Index also identifies Chipping Ongar as a 'minor local centre' with a 'middle market position'.

### Diversity of Uses

- 3.90 There are no Experian Goad survey data available for Chipping Ongar. The Council's own survey data from September 2007 (updated in April 2009) have therefore been used with floorspace figures obtained from base mapping. The results are summarised in Table 3.6 below.

**Table 3.6 Chipping Ongar diversity of uses in May 2009**

Use Class	Units	Floorspace (sqm)	Floorspace (%)	UK Average (%)
A1 Convenience	8	2,684	36.72	16.65
A1 Comparison	20	1,928	26.37	51.14
A1 Services	4	303	4.14	4.91
A2 Financial & Professional Services	14	1,473	20.15	7.68
A3 & A5 Restaurants, cafes & hot food takeaways	6	428	5.85	9.16
Miscellaneous	2	362	4.95	1.12
Vacant	3	133	1.81	9.34
<i>Sub-Total Experian Retail</i>	<i>57</i>	<i>7,309</i>	<i>100.00</i>	<i>100.00</i>
<b>Other floorspace</b>				
A4 Drinking Establishments	2	298	-	-
B1 Business	4	567	-	-
D1 Non-Residential Institutions	4	560	-	-
D2 Assembly and Leisure	1	169	-	-
Vacant	5	385	-	-
Sui Generis	5	802	-	-
<i>Sub-Total Other Uses</i>	<i>21</i>	<i>2,781</i>	<i>-</i>	<i>-</i>
<b>GRAND TOTAL</b>	<b>78</b>	<b>10,089</b>	<b>-</b>	<b>-</b>

Source: Appendix 2

- 3.91 There are 20 comparison retail units in the town centre representing 26% of the total floorspace compared to the national average of 51.1%. There is one charity shop in Chipping Ongar - the Heal Cancer Charity Shop. The A1 convenience units account for 36.2% of the total floorspace, 20% higher than the national average.



### *Presence of National Multiples and Major Retailers*

- 3.92 Chipping Ongar includes only two major retailers, namely Tesco and Sainsbury's, whilst a Lloyds Pharmacy is also present. The limited number of national multiples is expected, since Chipping Ongar is only a small centre serving a localised catchment.

### *Retail Property Offer*

- 3.93 Despite its relatively small size, Chipping Ongar contains a diverse range of shops from smaller, independent retailers to a larger supermarket in the form of Sainsbury's, with floorspace ranging between 20 and 600 sqm. There is also a very small market (2 to 3 stalls only) operating from Chipping Ongar every Wednesday morning. Generally, the unit size is small (other than the Sainsbury's) and is consistent with the centre's more localised function.

### *Proportion of Vacant Street Level Property*

- 3.94 In May 2009 the percentage of vacant retail units (three units in total) was 2%, lower than the national average of 9.3%. However, in total there were a further five vacant non-retail vacant units including a pub in the centre. It is understood that there have been enquiries for the redevelopment of this pub.

### *Pedestrian Flow*

- 3.95 The site visit to Chipping Ongar took place on a Friday afternoon, when the High Street was reasonably busy. Pedestrian numbers stayed constant as the visit went on into the late afternoon, with higher numbers around the Sainsbury's supermarket. As with the other five centres, there are no recent pedestrian flow data available for Chipping Ongar.

### *Accessibility*

- 3.96 In terms of public transport, the town centre is only accessible by bus. There are nineteen different bus routes between Chipping Ongar and the other centres in the district and towns to the north-east of the district such as Harlow and Chelmsford and Brentwood to the south.
- 3.97 In terms of vehicular movement, the High Street in Chipping Ongar connects Harlow and Epping with Brentwood. The A414 connects Chipping Ongar to Chelmsford, Epping and Harlow to the north.
- 3.98 There are three car parks in Ongar, namely The Pleasance, which is a long stay car park with 73 spaces, Basons Lane, which is a short stay car park with 52 spaces and finally the Sainsbury's car park with 56 spaces.

### *Crime and Safety*

- 3.99 Some nuisance from youth behaviour in Chipping Ongar has been reported to the Council. It is understood that the 'zero tolerance' policy for such behaviour in neighbouring Brentwood District has contributed to anti-social behaviour increasing in Chipping Ongar.
- 3.100 In terms of official statistics, Essex Police report that crime within the centre has decreased by 17% (from 15 to 12 crimes for a period between January and March 2009).

Chipping Ongar experiences the lowest crime rate out of the six centres examined in this study.

### *State of Town Centre Environmental Quality*

- 3.101 High levels of traffic along the High Street detract from the environmental quality. Otherwise, the centre has a pleasant local shopping environment.

### *Summary of Chipping Ongar*

- 3.102 Chipping Ongar is designated as a 'smaller centre' in the Epping District Local Plan. Due to the relatively localised offer in the centre and the definitions of centres in Annex B of PPS4, we recommend that Chipping Ongar is designated as a 'small district centre'. The health check has found the following:
- i) The centre contains two supermarkets (a small Tesco Express and a Sainsbury's store) and smaller independent retailers.
  - ii) Convenience floorspace as a percentage of town centre uses is higher than the national average and comparison floorspace is lower.
  - iii) There is also a very small market on Wednesday mornings.
  - iv) Chipping Ongar is easily accessible by private car however in terms of public transport it is only accessible by bus.
  - v) The centre has a vehicle-oriented environment and heavy traffic flows and this has led to a compromised environmental quality.
  - vi) Chipping Ongar has the lowest crime rate of all six town centres subject to this study.

## **Buckhurst Hill - Queens Road (East)**

### *Retail Ranking*

- 3.103 The MHE Index ranked Buckhurst Hill 2,779 in 2008; there are no time series data for this centre. The MHE Index also identifies Buckhurst Hill as a 'minor local centre' with an 'upper middle market' position indicating a high quality retail offer. Buckhurst Hill is the only centre in the district that benefits from this category (see Table 3.1, page 9).

### *Diversity of Uses*

- 3.104 There are no Experian Goad survey data available for Buckhurst Hill. The Council's own survey data from September 2007 (updated in April 2009) have therefore been used with floorspace figures obtained from base mapping. The study focuses on the concentration of floorspace on Queens Road (East) in Buckhurst Hill. The results are summarised in **Table 3.7** below.

**Table 3.7 Buckhurst Hill diversity of uses in May 2009 (Queens Road East only)**

Use Class	Units	Floorspace (sqm)	Floorspace (%)	UK Average (%)
A1 Convenience	5	2,740	28.38	16.65
A1 Comparison	37	3,419	35.41	51.14
A1 Services	14	1,197	12.40	4.91

A2 Financial & Professional Services	13	1,045	10.82	7.68
A3 & A5 Restaurants, cafes & hot food takeaways	11	1,017	10.53	9.16
Miscellaneous	2	170	1.77	1.12
Vacant	1	66	0.69	9.34
<i>Sub-Total Experian Retail</i>	<i>83</i>	<i>9,654</i>	<i>100.00</i>	<i>100.00</i>
<b>Other floorspace</b>				
A4 Drinking Establishments	1	283	-	-
B1 Business	2	290	-	-
D1 Non-Residential Institutions	5	749	-	-
D2 Assembly and Leisure	3	302	-	-
Vacant	2	165	-	-
Sui Generis	4	812	-	-
<i>Sub-Total Other Uses</i>	<i>17</i>	<i>2,601</i>	<i>-</i>	<i>-</i>
<b>GRAND TOTAL</b>	<b>100</b>	<b>2,667</b>	<b>-</b>	<b>-</b>

Source: Appendix 2

- 3.105 Comparison units occupy 35% of the floorspace and this is lower than the national average of 51.1%. Despite this the proportion of floorspace is lower than the national average, there are 37 units and a high proportion of specialist fashion outlets. There is one charity shop unit in the centre - St Clare Hospice on King's Place. The proportion of convenience floorspace is 28.4% and is higher than the 16.7% national average. The proportions of A2 and A3 and A5 floorspace are higher than national averages.

#### *Presence of National Multiples and Major Retailers*

- 3.106 Waitrose is the only major (or high profile) retailer in Queens Road. The centre otherwise has a large independent retailing sector, with many clothing boutiques. Many units in the town centre are now being used as restaurants and bakeries.

#### *Retail Property Offer*

- 3.107 The shopping provision in Buckhurst Hill is concentrated on Queens Road. The shopping area itself is split in two - eastern and western - separated by a residential area in the centre. Many of the existing retail units appear to have been converted into retail from residential uses. These units are restricted in size.

#### *Proportion of Vacant Street Level Property*

- 3.108 In May 2009 there is one vacant retail unit and two other vacancies in the centre. This is particularly low, representing just 1% of the total floorspace compared to the national average of 9.3%. The vacant units were located on Queens Road and Kings Avenue.

### *Pedestrian Flows*

- 3.109 A site visit to the centre was undertaken on a Friday morning in April 2009. Pedestrian levels were low but steady during the time of the visit. However, as there are no recent footfall data published for the centre, specific trends on the levels of pedestrian movement have not been identified.

### *Accessibility*

- 3.110 The centre has good public transport accessibility via both the London Underground (Central Line) and bus. 10 different bus routes connect Buckhurst Hill with Ilford, Loughton, Chigwell, Walthamstow, Woodford Green, and Woodford.
- 3.111 Commuter parking is a major issue in the area. There are only two car parks on Queens Road (18 and 100 spaces) and these spaces are under pressure from both shoppers and commuters.
- 3.112 Queens Road is not as busy compared to the other six centres.

### *Crime and Safety*

- 3.113 In terms of public safety, there is CCTV in operation on Lower Queens Road but this is not included in the town centre as defined in the Local Plan Alterations 2006. However, the underpass connecting Queens Road and Lower Queens Road is not covered by CCTV. It is an important pedestrian link, where crime-prevention measures could be installed. Essex Police report that the average number of crimes in Buckhurst Hill increased by 28.7% from 29 (for April - June 2008) to 37 (for April - June 2009).

### *State of Town Centre Environmental Quality*

- 3.114 Buckhurst Hill has a limited retail offer compared with other larger centres in the district. It is generally well kept and recent street improvement works have been undertaken and reflect positively on the environmental quality of the centre.

### *Summary of Buckhurst Hill*

- 3.115 Buckhurst Hill is designated as a 'district centre' in the Epping Forest District Local Plan. Due to the relatively localised offer in the centre and the definitions of centres in Annex B of PPS4, we recommend that Buckhurst Hill is designated as a 'small district centre'. The health check has found the following:
- i) The shopping provision in Buckhurst Hill is concentrated on Queens Road.
  - ii) There is only one national multiple located in the centre - Waitrose.
  - iii) It is characterised by a large number of independent shops and has a low vacancy rate.
  - iv) The centre enjoys good accessibility by public transport (both underground and bus), and the private car.

### **Out of Centre Floorspace in Epping District in 2009**

- 3.116 Out of centre floorspace in the district is limited. The Highbridge Retail Park is located near Waltham Abbey town centre. In May 2009 this included Carpetright, Harveys and

one vacant unit. A LiDL store in Cartersfield Road, Waltham Abbey (net retail space of 1068 sq m) opened in February 2010. There is also a McDonald's Drive Through restaurant at the retail park. Loughton has a small Homebase (1,700 sqm gross) at 140 Church Hill, significantly north and separate from the High Road centre.

## Summary of Competing Centres in the Sub-Region

- 3.117 The key competing centres in the sub-region are summarised in the remainder of this section. These destinations are listed in **Table 3.8** below, alongside their position in the shopping hierarchy of the East of England Plan (EEP) or London Plan, as relevant.

**Table 3.8 Designations and Rankings for Competing Centres**

Centre	Designation in East of England Plan/London Plan	Management Horizons Europe Ranking 2008	Management Horizons Europe Function 2008
Romford	Metropolitan centre	47	Major Regional
Chelmsford	Regional centre	114	Regional
Walthamstow	Major centre	168	Sub-Regional
Harlow	Major town centre	218	Major District
Brookfield Centre	-	629	Minor District

Source: East of England Plan, London Plan and MHE Index (2008).

- 3.118 The specific characteristics of each of these centres and any planned growth are described below. As part of this analysis, a summary of other large centres in the wider sub-region is summarised to complete the picture.

### *Romford*

- 3.119 Romford is a metropolitan centre identified in Greater London, and comprises over 186,000 sqm of retail floorspace. It is anchored by the Brewery Centre and the extended and refurbished Liberty Centre, which together contain 135 retail units. The Area Action Plan (AAP) (adopted in 2008) envisages a further 30,000 sqm (net) of comparison floorspace for the centre by 2018.

### *Chelmsford*

- 3.120 Chelmsford is identified as a regional centre in the EEP and currently includes some 110,000 sqm of retail floor space. Its principal retailing destinations are the High Chelmer and the Meadows shopping centres. The Chelmsford Area Action Plan (adopted 2008) envisages a further 86,000 sqm (net) retail floorspace by 2016 increasing to 100,000 sqm (net) by 2021.

### *Harlow*

- 3.121 Harlow has a retail floorspace of over 49,000 sqm (gross) and is a regional centre in the EEP. It is anchored by the Harvey Centre and includes stores such as Primark, Tesco,

BHS and Marks & Spencer. Its retail provision has been improved recently following the Water Gardens development (38,000 sqm gross).

- 3.122 There are firm plans to expand Harlow through the Town Centre North proposals. These are still at a relatively early stage, but consultation has taken place. There is also developer support from Stockland and Harlow Renaissance. The proposals envisage approximately 40,000 sqm (gross) of additional retail floorspace and an application is expected in 2010. This development will present a real risk to the future market share of Epping Forest's centres and in particular Epping due to its geographical position close to Harlow.

### *Walthamstow*

- 3.123 Walthamstow is the closest centre to Loughton High Road outside the district. It is a major centre in the London Plan with excellent regional transportation links. A 5-year town centre revitalisation scheme has recently been completed in Walthamstow, including the re-creation of the town square and gardens, as well as the improvement of lighting, paving and signage around the town centre.

### *Brookfield Centre*

- 3.124 The Brookfield Centre is an out-of town centre located near Cheshunt just outside the Epping Forest administrative boundary. The centre currently consists of Brookfield Retail Park (Argos, Next, Boots) and Brookfield Farm (Tesco and Marks & Spencer). It is a predominantly car focused centre and benefits from free parking, with limited bus services. Its total floorspace is approximately 20,000 sqm (gross) and a Tesco Extra and a Marks and Spencer anchor the centre.
- 3.125 The Broxbourne Local Plan Second Revision makes provision for the expansion of Greater Brookfield (including the existing retail units). The Local Plan identifies the need for a masterplan to guide this process. Proposals are carried forward in the Core Strategy Preferred Options document, which was subject to public consultation until February 2009. The expansion and enhancement of the existing retail offer would be part of the Brookfield expansion, likely to commence in several years. Discussions are currently ongoing with developers and other relevant stakeholders.

### *Other centres*

- 3.126 In addition, there is planned growth in the following centres:
- **Iford:** this is a metropolitan centre in the London Plan and its AAP (adopted 2008) plans for some 30,000 sqm (gross) of new retail floorspace.
  - **Lakeside:** in January 2010 it was designated a regional centre in the EEP and there is planned growth for some 50,000 sqm net of comparison goods floorspace by 2019.
  - **Stratford:** it is an existing major centre in the London Plan, but it will be elevated to metropolitan centre once the new Westfield shopping centre opens which will provide 150,000 sqm (gross) of additional retail and other town centre floorspace intended to open in 2011.

- **Basildon:** this is a regional centre in the EEP and there are plans in the pipeline for some 49,000 sqm (gross) of retail and leisure floorspace supported by Basildon Renaissance Limited.

### *Consequence of competition*

- 3.127 The consequence of competition from surrounding developments for the Epping Forest centres is important. Although some schemes have been put on hold due to the downturn in the economy, it is likely that during the plan period many of these schemes will be revived and implemented. There is a general trend of polarisation of town centres in the UK and as the larger centres get larger, the retail function of secondary centres is diluting. In light of this competition, there is a risk to the centres in Epping Forest. Although the district's centres are lower order, it is important that they continue to function successfully in the hierarchy and serve the local population. This matter is examined in further detail in the recommendations for strategies in **Section 8**.

## Summary of Hierarchy of Centres

- 3.128 The suggested revision to the hierarchy of centres is set out in the following table. This is based on a consideration of the role and function of each centre within the district and recourse to the advice in PPS4.

**Table 3.9 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

- 3.129 The terminology 'small district centre' is not specifically mentioned in PPS4. However, the centres in question do not fulfil all the characteristics of district centres in Annex B of PPS4. However, they are larger than local centres. Consequently as a compromise, a small district centre position in the hierarchy is suggested to respond to the characteristics of these centres. This matter is addressed further in Section 8.

