Report to the Local Development Framework Cabinet Committee

Epping Forest District Council

Report reference: ***LDF-005-2010/11***
Date of meeting: ***13 July 2010***

Portfolio: **Leader**

Subject: **Town Centres Study**

Responsible Officer: **Kevin Wright** **(01992 564095)**

Democratic Services Officer: **Gary Woodhall** **(01992 564470)**

Recommendations/Decisions Required:

(1) To note the content of the Town Centres Study as part of the Local Development Framework evidence base

Executive Summary:

The Town Centres Study provides the first comprehensive assessment of retail and leisure provision across the District's main centres. The study provides an understanding of the current state of retail and leisure provision in each of the main centres. Using this base the study then provides an assessment of future retail and leisure need in terms of both quantity of floorspace and the quality of the offer. This assessment of future need will help to guide decision making on policies in the Core Strategy for each of the District's main centres.

Reasons for Proposed Decision:

The Local Development Framework must be based on robust and up-to-date evidence, and a number of technical studies have been commissioned to provide this evidence. The Town Centres Study provides information about retail and leisure uses in the District's six main centres as identified in the existing Local Plan, which will be used to formulate policies in the emerging LDF.

Other Options for Action:

Not to include the Study as part of the Evidence Base.

Report:

1. PPS4 Planning for Sustainable Economic Growth requires local planning authorities to prepare an evidence base to plan for town centres in the future. PPS4 requires that an assessment is made of the current health of the District's main centres, that the role of each centre is considered, in particular relative to other centres in the area, and that the need for future retail and leisure development is assessed.

2. Roger Tym & Partners were appointed in March 2009 to undertake the Town Centres Study. At that time PPS6 Town Centres was the national policy that required local planning authorities to assess the main centres within their area. PPS6 was replaced in December 2009 by PPS4 although the need to assess the centres within the District remained. As a

result the decision was made to revise the first draft of the Study to take account of the new PPS4 and to include more up to date financial information that had become available since the completion of the research on the study. As a result of these changes the completion of the study was delayed.

3. The study provides information on the six main centres as defined by the current Local Plan, including coverage of the main uses within each of those centres and the amount of floorspace in each use, the capacity for the centre to grow or change its position within the hierarchy of centres, the interest from retailers that are looking to move into the centre, existing rents within the primary shopping areas, and the ease with which people can assess the centre by different forms of transport.

4. The project brief required that the study be carried out in accordance with PPS6, later replaced by PPS4, and in addition that an assessment be made of existing Local Plan policy on retaining a percentage of retail frontage within the six main centres (policy TC4). In carrying out the research a household telephone survey and visitor survey were conducted. The household telephone survey was used to assess the shopping patterns of residents within the District for their main food and grocery, top up, non-food shopping and leisure activities. The visitor survey provided information on the reasons why people visited each centre, likes and dislikes of each centre, comparison goods shopping behaviour and the demographic profile of visitors.

5. Both surveys were carried out by NEMS market research. 800 people were interviewed across the study area for the telephone survey. This number of interviewees is statistically robust as a sample of the total population and is consistent with similar surveys conducted in other local authority areas. For the visitor survey 500 random interviews were carried out on the street across the six centres. Again this number of surveys is statistically robust and enables the significance of the results to be measured. In addition to these surveys, Roger Tym & Partners made contact with Epping Town Council, Waltham Abbey Town Centre Partnership, Loughton Town Council, Loughton High Road Town Centre Partnership, Ongar Town Forum and Buckhurst Hill Parish Council as part of a stakeholder consultation.

Key Findings

6. The study looked at the centres of Epping, Loughton High Road, Waltham Abbey, Loughton Broadway, Chipping Ongar and Buckhurst Hill, the six main centres as defined in the existing Local Plan.

7. In some respects the District is unique as it is located on the edge of Greater London and some parts have excellent access via public transport into the City of London and the West End. In addition there are several higher order centres located a short distance outside the District, including Harlow, Brentwood, Chelmsford, Romford and Ilford, that draw a significant amount of retail and leisure spending away from the District. The household telephone survey asked interviewees about their spending in these centres along with specialist shopping centres such as Lakeside and Bluewater. The District has no town centres that perform a similar role to these surrounding larger higher order centres. The six centres in the District are all of a lower order and provide services and facilities that reflect their size and role relative to the surrounding centres.

8. Nationally there has been a trend of people spending more in larger higher order centres to the detriment of smaller local centres. Also there has been a rise in alternative forms of retailing, in particular trading over the internet. The smaller centres in the District may be susceptible in future to these changes to shopping patterns and habits.

9. Changes are suggested to the existing hierarchy of centres. In the Local Plan the six centres are defined as follows: Principal (Epping, Loughton High Road, Waltham Abbey), Smaller (Loughton Broadway, Chipping Ongar) and District (Buckhurst Hill – Queens Road East). Based on the assessments of vitality and viability for each centre the study recommends that the hierarchy for the six centres is revised.

10. Taking into account the definitions for different centres used in PPS4 the suggested revision is to Town Centre (Epping, Loughton High Road) and Small District Centre (Waltham Abbey, Loughton Broadway, Chipping Ongar, Buckhurst Hill). Those suggested as Small District Centres do not fully meet the district centre definition in PPS4. However they do have a wider role than the definition given for local centre and therefore the compromise of Small District Centre is recommended. However variations on this suggested terminology can be considered as part of the Local Development Framework process.

11. In terms of future development for the centres in the District, capacity is identified for comparison retailing and convenience retailing. Comparison retail covers non-food items such as clothing, furniture and electrical goods for which some comparison is normally made before purchase. Convenience retail covers everyday items such as food, newspapers and drinks which are purchased regularly. Capacity is also identified for food and drink leisure uses; this includes bars, restaurants and entertainment venues such as cinemas, bingo halls and bowling alleys.

12. The quantitative need for new floorspace for the District is summarised in Table 8.2 on page 88, Volume 1 of the Town Centres Study (see Appendix 1 to this report). The figures showing quantitative need are for the periods 2009 to 2016, 2009 to 2021 and 2009 to 2031. This as per the guidance in national policy to look at need within 5 and 10 years and to provide indicative figures for the full extent of the plan period. The figures for 2031 are indicative only and less weight is put on these given the length of time into the future.

13. The headline figures for the District are:

(a) capacity for A1 comparison retail is identified up to 2016 of 13,700 sqm and up to 2021 of 21,600 sqm;

(b) capacity for A1 convenience retail (superstores or supermarkets) is identified up to 2016 of 3,700 sqm and up to 2021 of 4,900 sqm; and

(c) capacity for A1 convenience retail (small foodstores or deep discounters) is identified up to 2016 of 3,600 sqm and up to 2021 of 4,800 sqm

14. To put these figures in a real world context the following stores in the District have gross floorspace figures as follows; Tesco, Epping (2,760 sqm), Sainsbury's, Loughton (4,150 sqm) and the recently opened Lidl, Waltham Abbey (1,640 sqm). In line with national policy new retail capacity would need to be located in the existing six centres. The study suggests locating new retail at the following locations; St John's in Epping, at the Brown's car showroom site in Loughton (granted planning permission for retail in May 2009), along with intensification of the existing floorspace in that centre and on the sites previously identified for redevelopment in Loughton Broadway. The study also suggests some small scale redevelopment in Waltham Abbey, Chipping Ongar and Buckhurst Hill although it acknowledges the limited number of available sites, at present, in those centres.

15. The figures for comparison and convenience retail are based on an increased market share scenario. This approach seeks to increase the share of the market that the six centres have for all retail spending by residents of the District. In practice this means a change of shopping patterns through the development of new retail floorspace within the District. The

figures are based on “front loading” this additional floorspace into the earlier part of the time period to bring about the change in shopping patterns and hence market share.

16. In qualitative terms the study gives a clear message that there is reasonably high levels of expenditure leakage from the district for both comparison and convenience goods and there is an opportunity to “claw back” some of this expenditure to the District. In addition there is modest overtrading of the existing foodstores. This existing overtrading combined with expenditure leakage to larger stores outside the district means there is scope to improve the convenience retail offer in order to increase choice and competition. Also in terms of improving the retail quality of the centres 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 there is demand, in particular from some clothing operators, to occupy space in the larger centres i.e. Epping and Loughton High Road.

17. For leisure the assessment found that there was potential for development to improve the local commercial leisure provision. The summary of quantitative need shows a floorspace need for bars, cafes and restaurants (A3, A4 and A5 uses). For other commercial leisure uses there is some scope for cinema provision within the District. However the study concludes that due to the lack of higher order centres in the District and large centres such as Harlow and Romford being nearby there is not expected to be scope for a multiplex cinema within the District. The study suggests a more realistic option would be to encourage a small art house cinema to improve competition and provide an alternative to a large mutliplex.

18. The quantitative figures for new retail floorspace within the District have been disaggregated by the consultants who make a recommendation as to how the new floorspace could be split between the six centres. However as the study points out the final decision on the location of new retail floorspace will be made within the Core Strategy.

19. The review of the Local Plan policy on retail frontages (policy TC4) states that the frontages policy is generally performing well and there are no major gaps in the shopping frontages. The recommendation is made that future policy on retail frontage may need to separate out primary and secondary frontage (in line with PPS4). For any new secondary frontage the policy could be relaxed to encourage new non-retail operators (in particular higher quality A3/A5 food and drink leisure uses) to enter the market and provide a greater diversity of uses.

Resource Implications:

This study cost £42,437 (excluding VAT) and has been funded by the LDF budget.

Legal and Governance Implications:

None relevant

Safer, Cleaner and Greener Implications:

None relevant

Consultation Undertaken:

None at this stage, although the study will be part of the Evidence Base for the Core Strategy and will therefore be subject to public consultation at appropriate times.

Background Papers:

PPS4: Planning for Sustainable Economic Growth

Impact Assessments:

Risk Management
None

Equality and Diversity:
Preparation of the Local Development Framework as a whole will be subject to an Equality Impact Assessment at a later date.

Did the initial assessment of the proposals contained in this report for relevance to the Council's general equality duties, reveal any potentially adverse equality implications?	N/A
Where equality implications were identified through the initial assessment process, has a formal Equality Impact Assessment been undertaken?	N/A

What equality implications were identified through the Equality Impact Assessment process?
N/A

How have the equality implications identified through the Equality Impact Assessment been addressed in this report in order to avoid discrimination against any particular group?
N/A