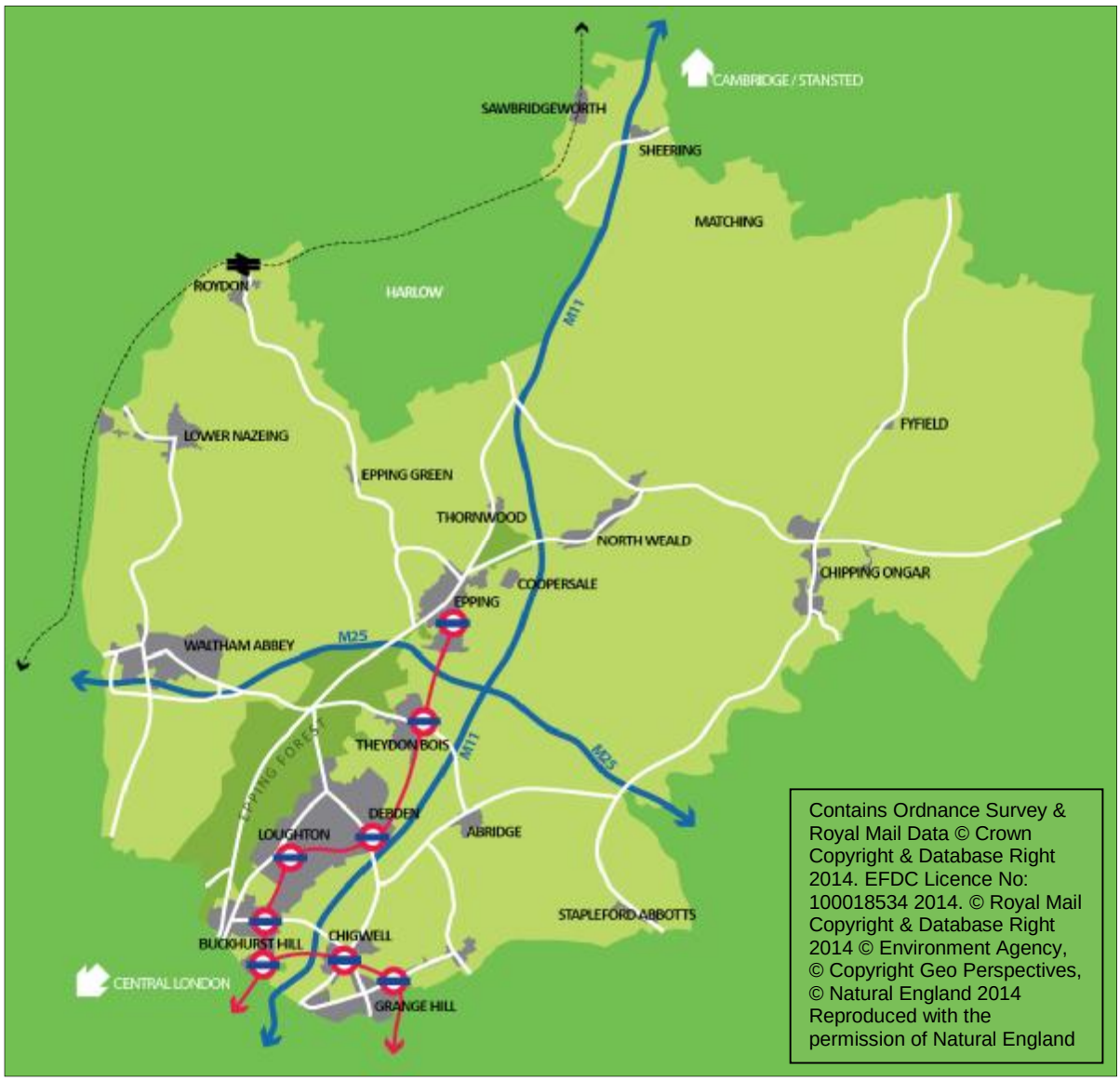
Chapter 2 - Setting the Scene

The Plan Area – Epping Forest District

Figure 2.1 – Epping Forest District
Source - Copyright Epping Forest District Council



2.1 Epping Forest District is in the south-west of Essex abutting both Greater London and Hertfordshire. The south–west of the District is served by the London Underground Central Line (both the main line and the 'Hainault via Newbury Park' loop). Epping Station is the eastern terminus and there are 7 other stations in service in the District[1]. There is one national railway station in the District – at Roydon on the Liverpool Street to Stansted and Cambridge line, although other railway stations (Broxbourne, Sawbridgeworth, Harlow Town and Harlow Mill) are close to, and accessible from, the District. The Central Line used to run further than Epping,

[1] These are Theydon Bois, Debden, Loughton and Buckhurst Hill, together with the stations on the branch line at Roding Valley, Chigwell and Grange Hill.

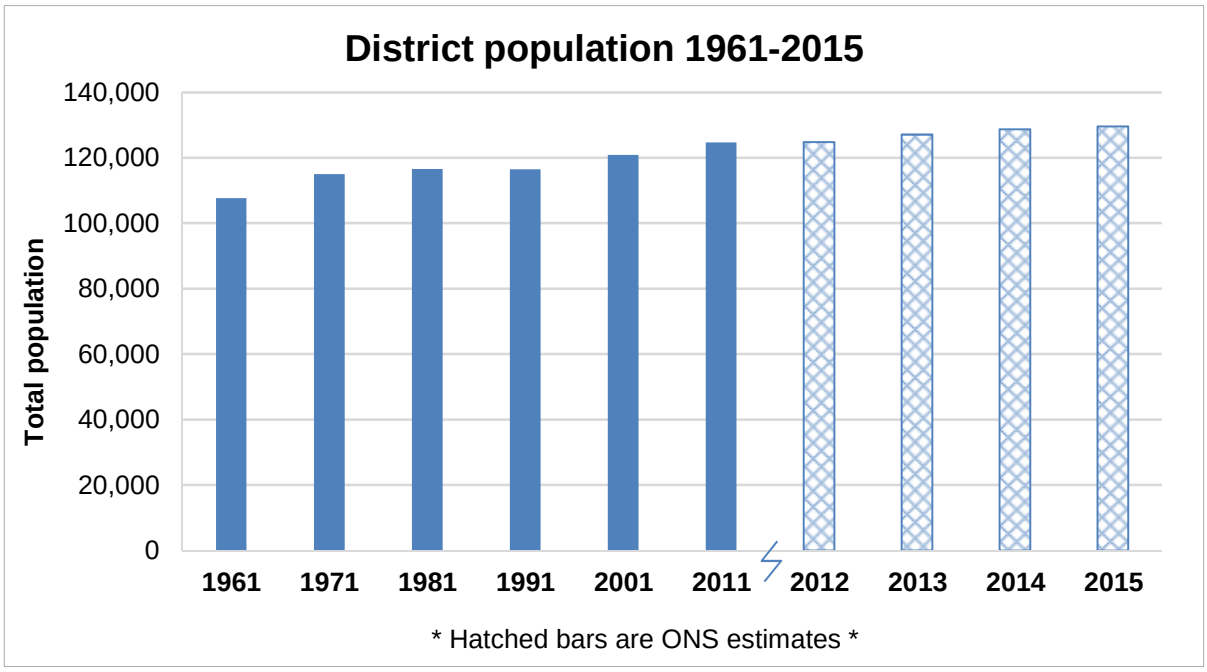
through stations at North Weald and Blake Hall to the end of the line at Ongar. Blake Hall station closed in 1981 with the line closing in 1994. In recent years the 'Epping and Ongar Railway' has been established, a nationally recognised heritage rail service running on this former Central Line track from Epping to Ongar. There is currently no operational rail connection between the heritage rail line and the Central Line track at Epping, but the 'Epping and Ongar Railway' runs some shuttle bus services locally.

2.2 The M25 runs east-west through the District, with a local road interchange at Waltham Abbey. The M11 runs north–south, with a full interchange (Junction 7) at Hastingwood just south of Harlow, and a northward –off/ southward- on interchange (Junction 5) at Loughton. There is also a motorway only interchange with the M25 south–east of Epping (Junction 6). The A414 is a key east-west route and this crosses the District from Harlow to Ongar on the way to Chelmsford and the Essex coast.

2.3 The District has 20 parish councils and 4 town councils and covers an area of approximately 130 square miles. The 2011 Census recorded a population of about 124,660 people living in close to 54,400 dwellings.

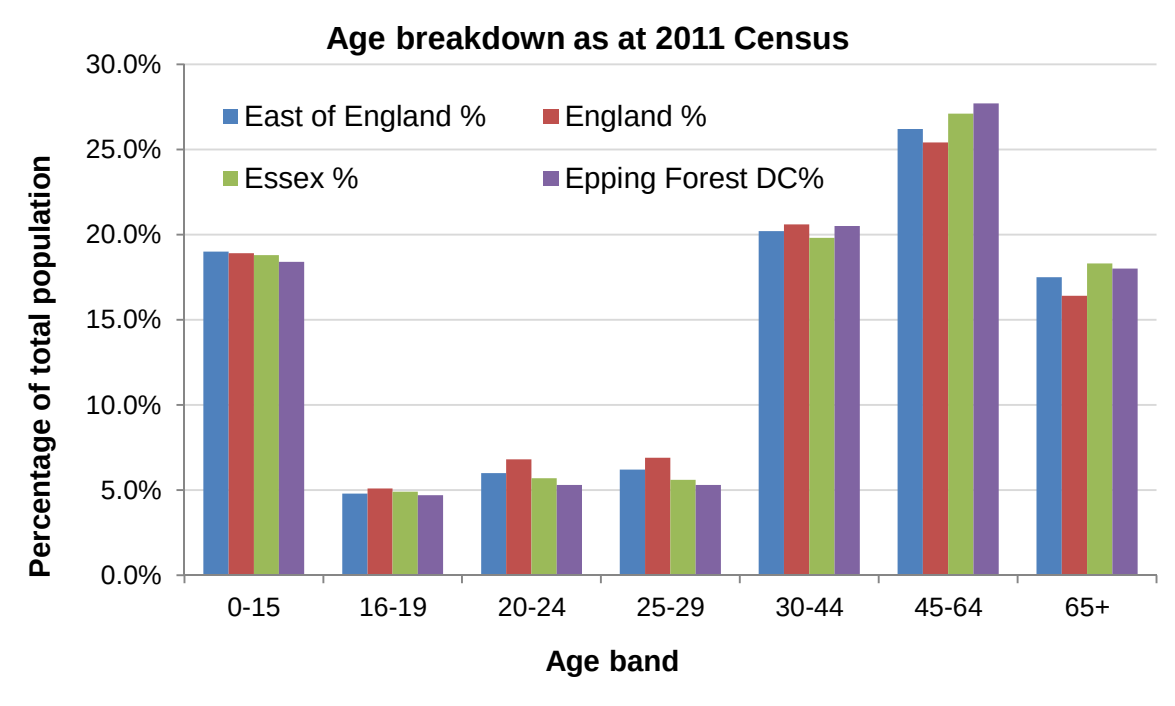
2.4 Figure 2 shows that the District's population increased by almost 17,000 between the Censuses of 1961 and 2011. Government estimates that the District's population has risen by just over 5,000 since 2011.

Figure 2.2 - Population growth in the District 1961-2015
Source - ONS, Census data 1961-2011 and Mid-Year Estimates 2012 to 2015



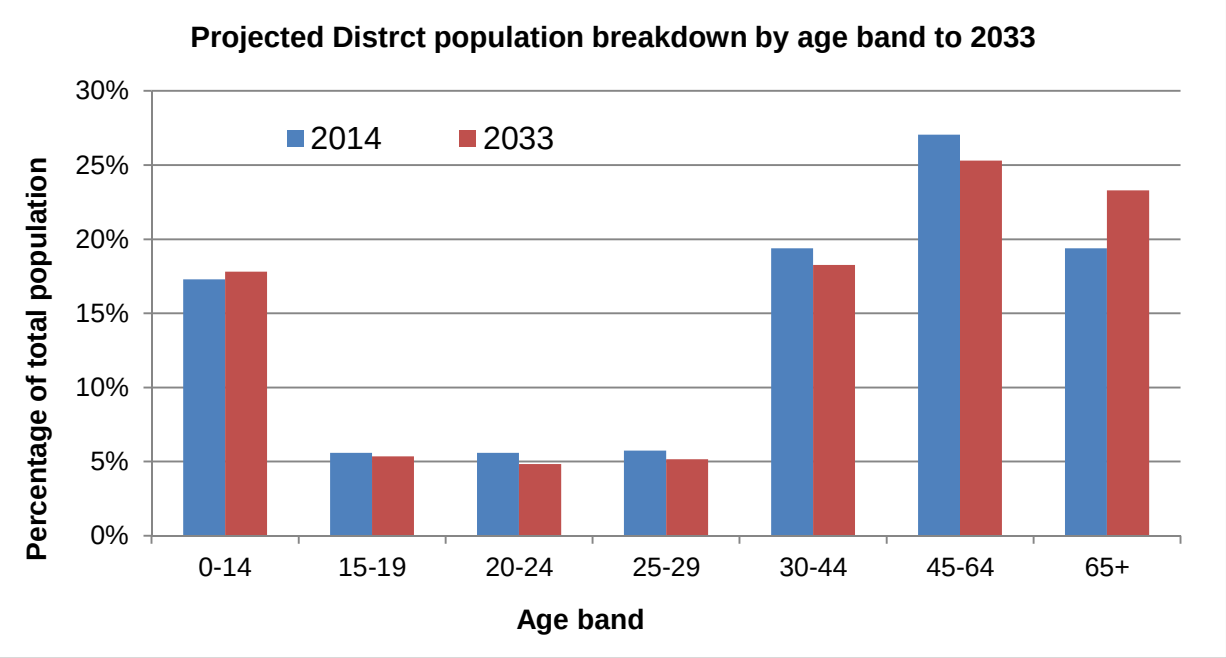
2.5 In 2011, compared to the rest of England, the District had smaller proportions of people aged under 30 and a larger proportion of people aged 45 to 64, and 65 and over. Figure 3 shows the breakdown.

Figure 2.3 - Population breakdown at 2011, by age band
Source - ONS, 2011 Census



2.6 By 2033, projections suggest the proportion of people aged over 65 will rise sharply compared to the other age bands, and that there will be a significant drop in the proportion of people aged between 30 and 64. Projections also suggest that the proportion of those between 15 and 29 will drop slightly, and that the proportion of people aged 0 to 14 will rise a little. Figure 4 shows the breakdown for Epping Forest District in 2011 and the projected breakdown in 2033.

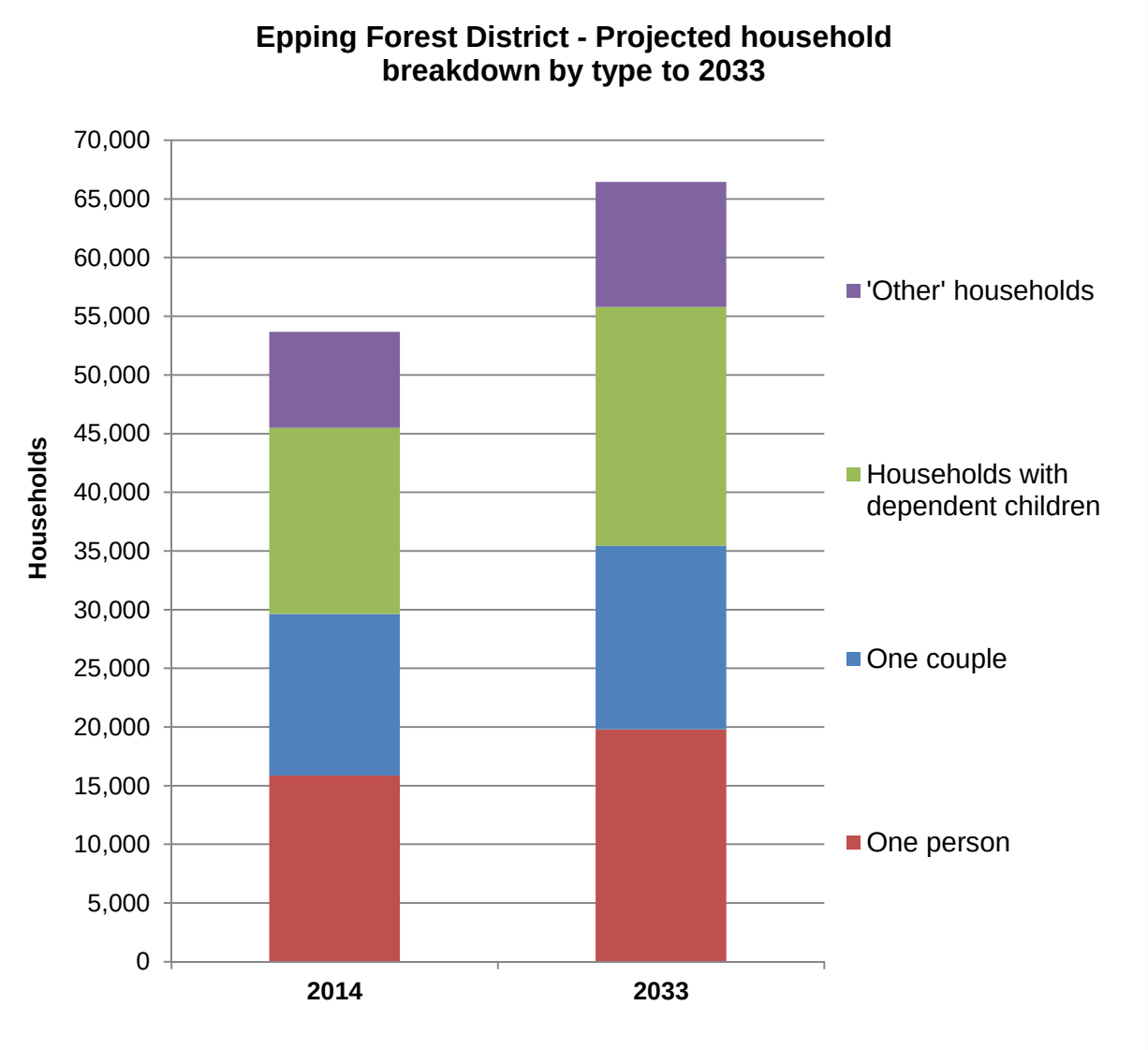
Figure 2.4 - Population breakdown at 2011 and projected breakdown for 2033, by age band
Source - ONS, 2014-based Subnational population projections



2.7 It is expected that the total number of households (a household being a single person who lives alone, or a group of people who live together) in 2011 was roughly 52,000. This is expected to rise to approximately 66,460 by 2033. The household projections suggest that by 2033, there will be proportionately more households consisting of one person, or a family with dependent children, and proportionately less households consisting of one couple. Figure 5 shows the breakdown.

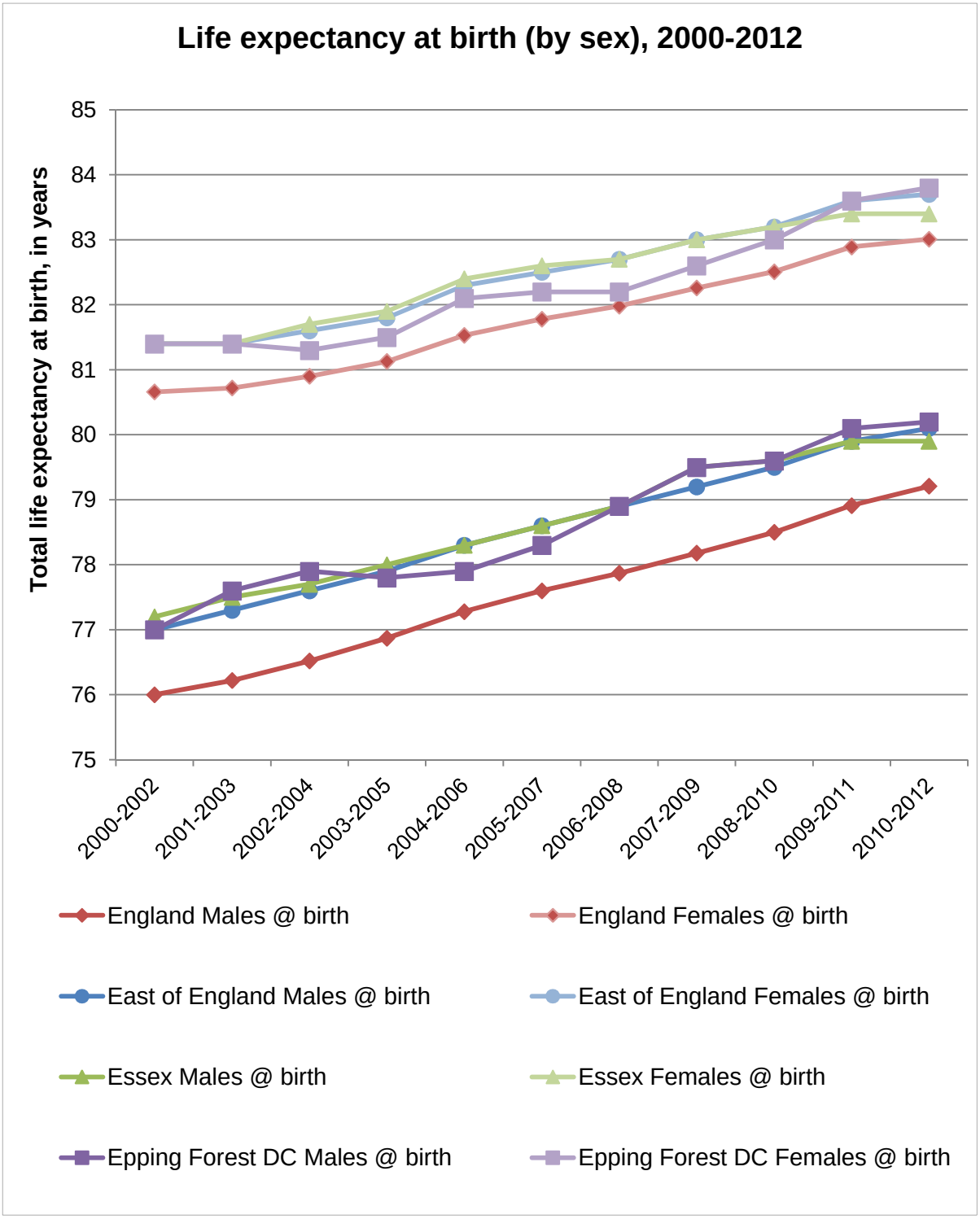
2.8 The number of households differs from the number of dwellings, because a small proportion of homes will be vacant or will be 'second' or holiday homes.

Figure 2.5 - Projected population breakdown by age band (2033)
Source - ONS, 2014-based Subnational population projections



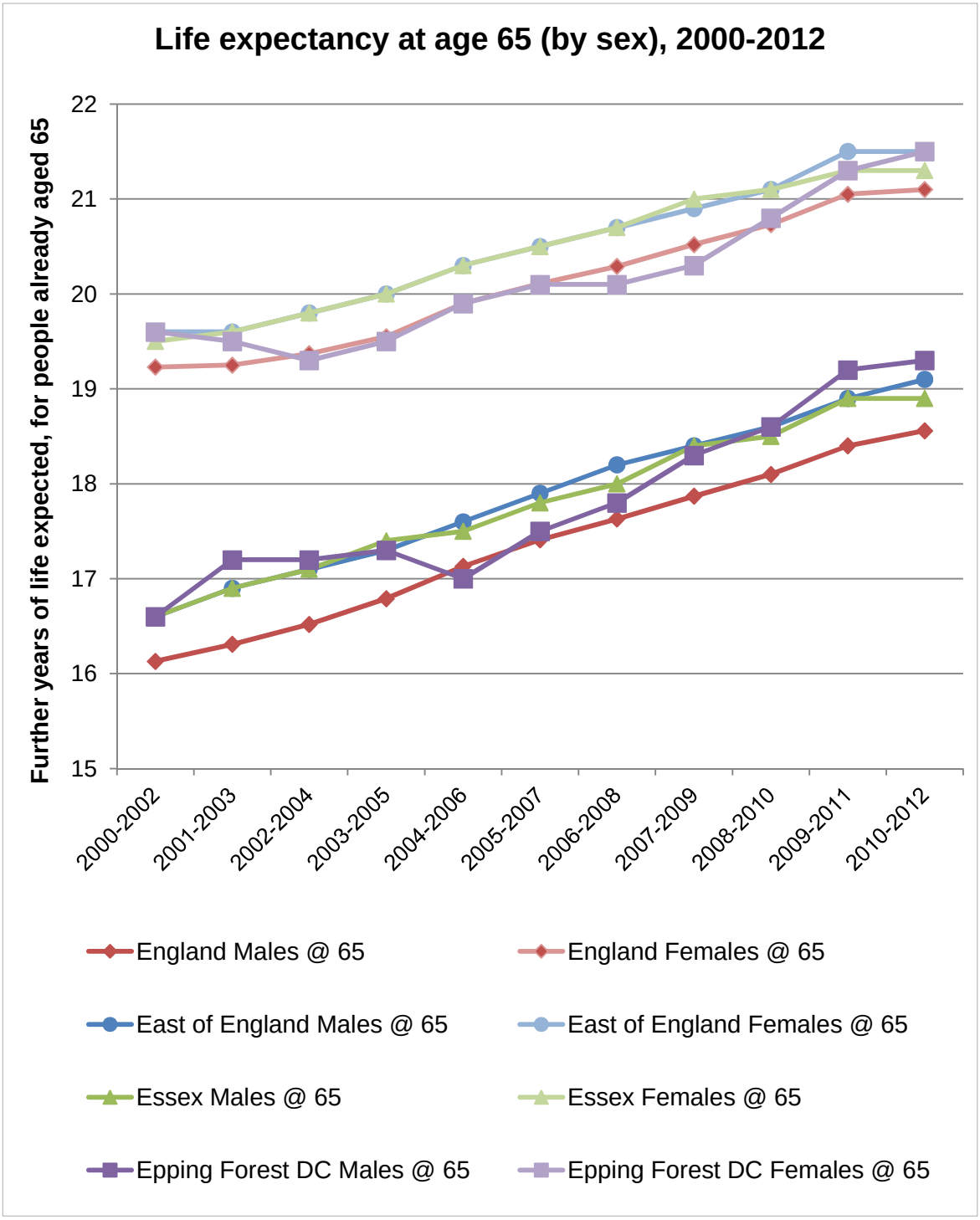
2.9 Life expectancy at birth in Epping Forest District in 2010-12 was higher than the national and the Essex averages, and similar to that of the East of England region, as shown in Figure 6. The District's life expectancy at birth has risen overall since 2000.

Figure 2.6 - Life expectancy at birth (by sex) 2000-2012
Source - ONS, Life expectancy at birth and at age 65, England and Wales



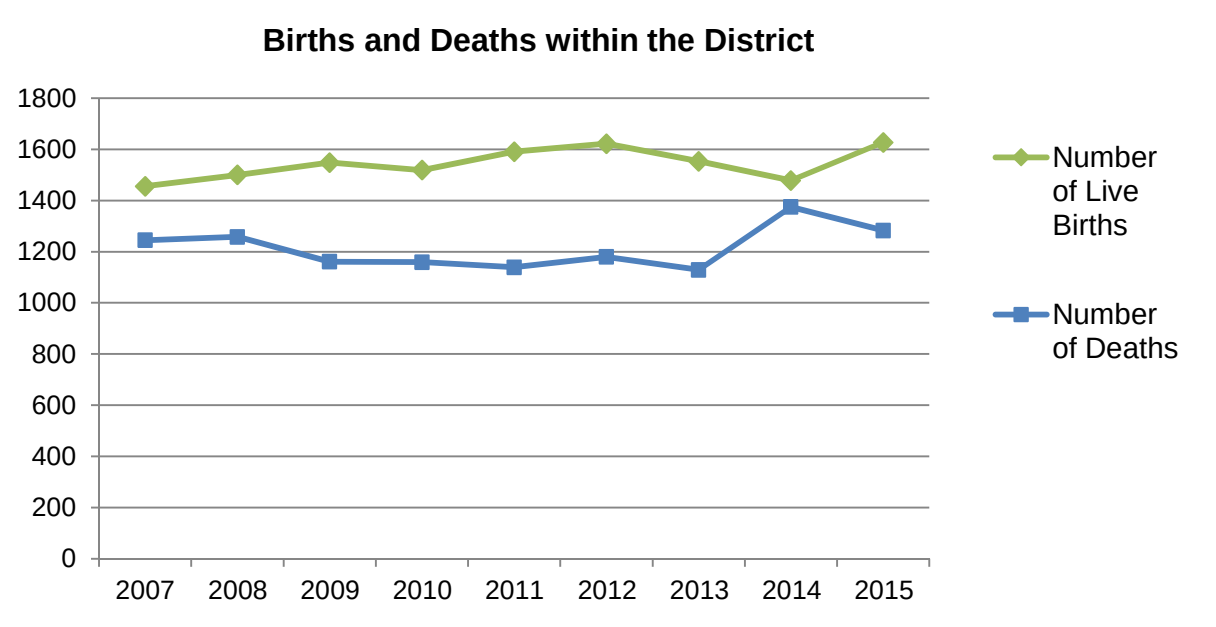
2.10 Life expectancy at age 65 in Epping Forest District in 2010-12 was higher than the national and Essex averages, and similar to that of the East of England, as shown in Figure 7. Life expectancy at age 65 in the District has also risen overall since 2000.

Figure 2.7 - Life expectancy at age 65 (by sex) 2000-2012
Source - ONS, Life expectancy at birth and at age 65, England and Wales



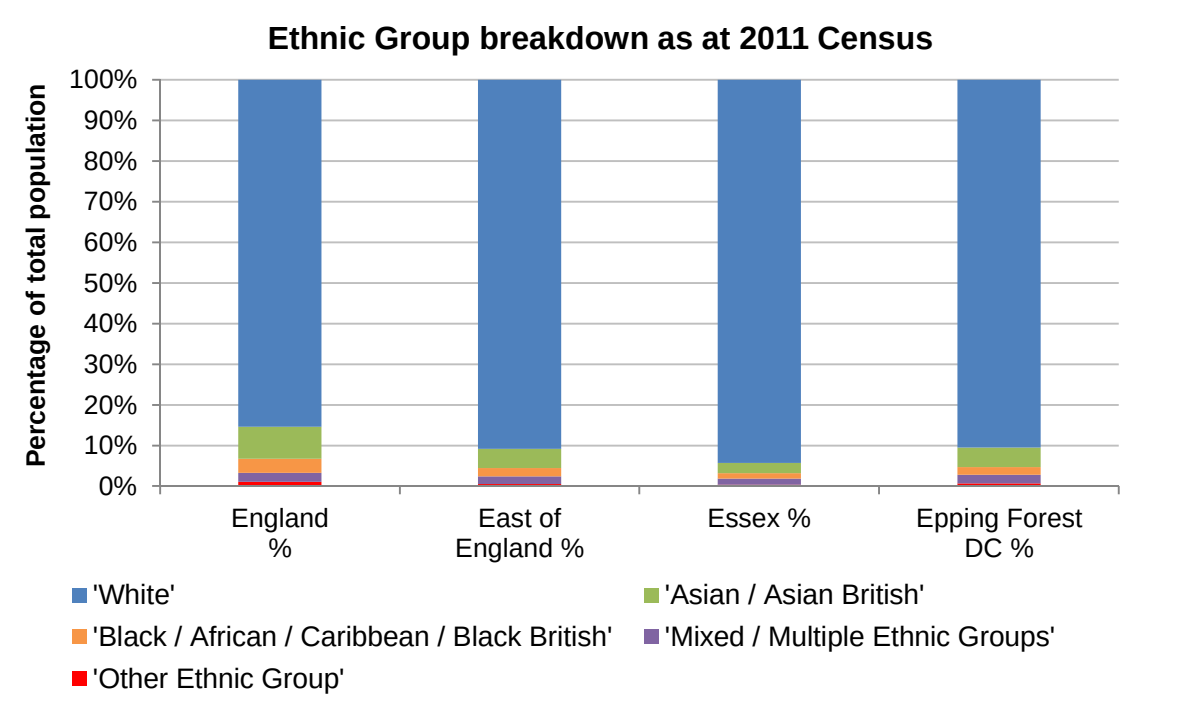
2.11 Births and deaths within the District have remained relatively steady in the District since 2007, as shown in Figure 8. There are more births than deaths, contributing to a rise in population.

Figure 2.8 - Births and Deaths within the District 2007-2015
Source - ONS, Annual tables on Live Births, and Deaths



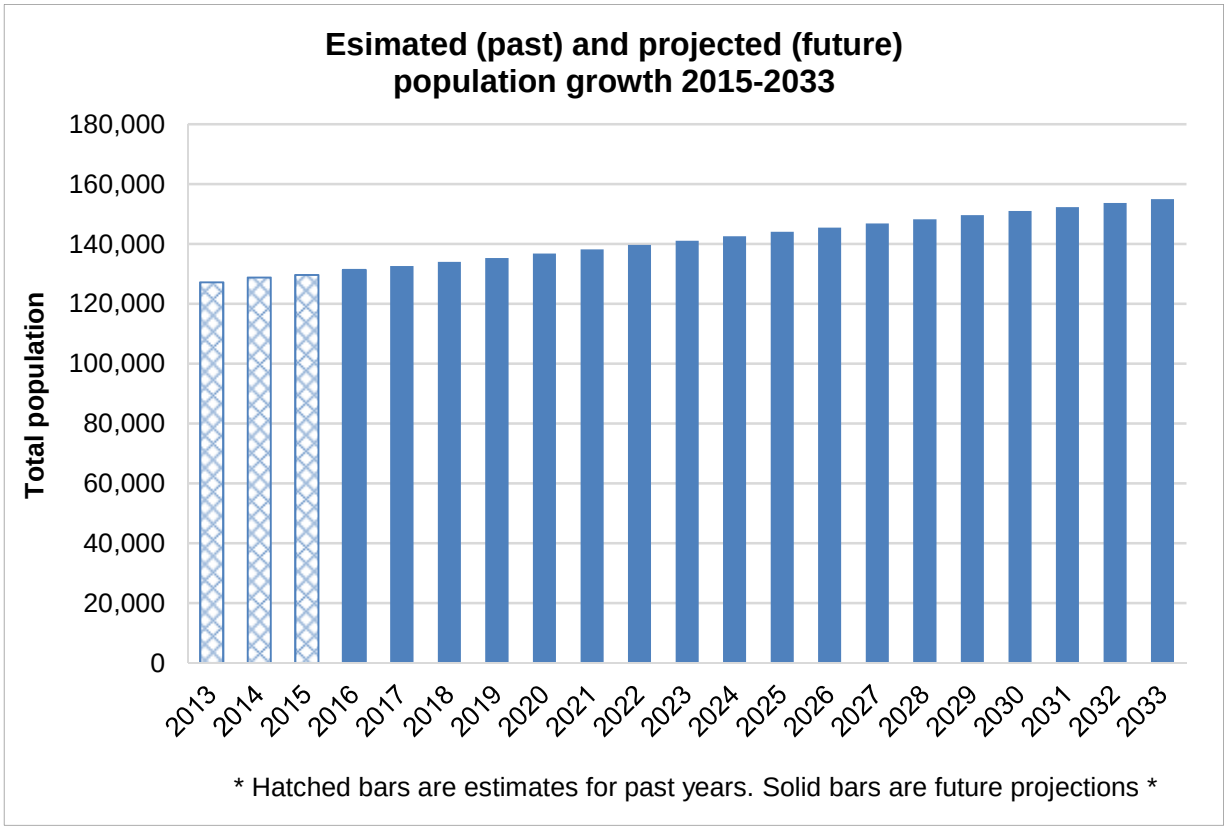
2.12 The 2011 census found that the majority of the population described their ethnic group as 'White' (90.5%). A further 1.9% described their ethnic group as 'Black African/ Caribbean/ or Black British', 4.7% as 'Asian or Asian British' and the remaining 2.7% as 'mixed/ multiple ethnic groups' or as 'other ethnic' groups. These broad numbers include 80.5% of people who describe their ethnic identity as English, Welsh, Scottish or Northern Irish and 0.1% who describe it as Gypsy or Irish Traveller. This broad ethnic group breakdown is very similar to that of Essex, the East of England Region, and England as a whole, as shown in Figure 9.

Figure 2.9 - Ethnic Group breakdown for the District in 2011
Source - ONS, Census data 2011



2.13 The District's total population is projected to rise to approximately 155,000 by 2033, as shown in Figure 10.

Figure 2.10 - Past and projected population growth, 2013 to 2033
Source - ONS, Mid-Year Estimates 2013 to 2015, and 2014-based Subnational population projections



2.14 Epping Forest District's population is affected by three main types of population change:

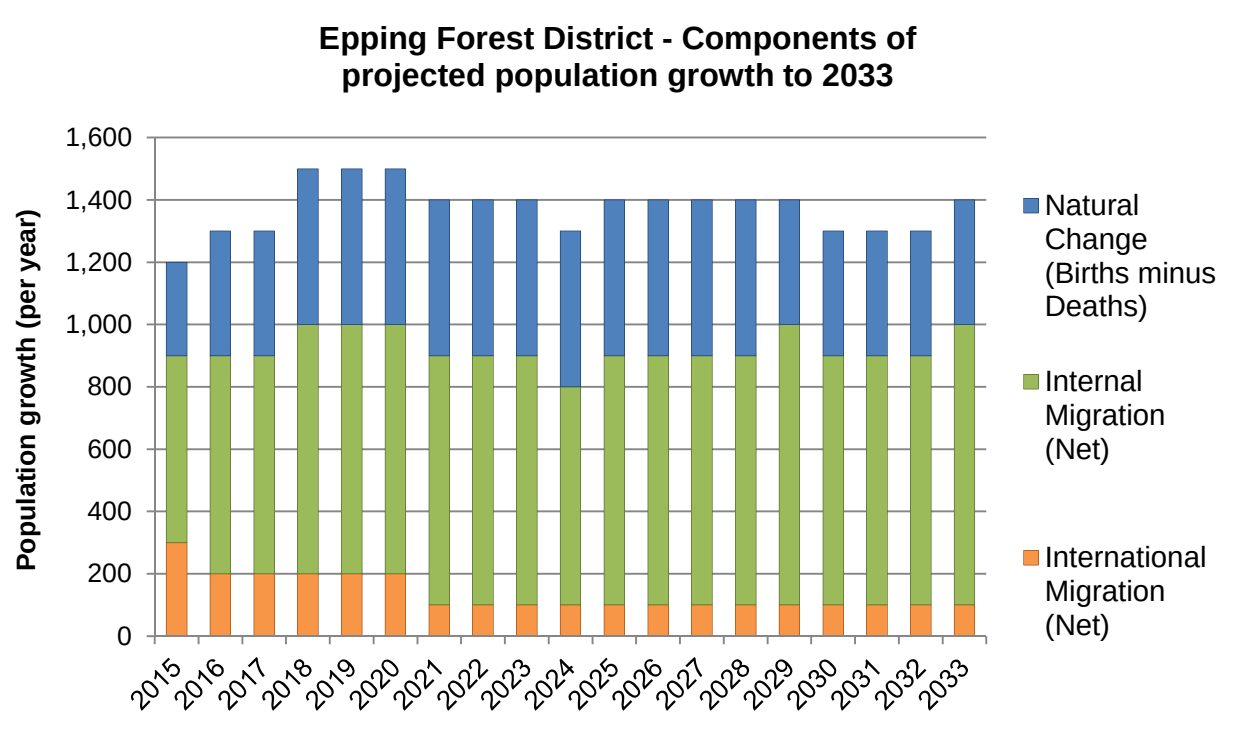
- natural change (the net gain of births minus deaths, of District residents);
- internal migration (the net gain of people moving to the District from elsewhere in the UK, or vice versa); and
- international migration (the net gain of people moving to the District from outside the UK, or vice versa).

2.15 Of these, internal migration is projected to be the largest contributor to population growth, as shown in Figure 11, most likely as a result of the District's location on the edge of London.

2.16 Natural change is projected to be a relatively steady, smaller gain for the District. International migration is more difficult to measure, but is projected to form only a small proportion of the population change, being much less than internal migration. Whilst future migration trends may be affected by the UK leaving the EU; and whilst it is currently unclear what arrangements might be put in place to restrict immigration, the likely implications will need to be kept under review. It is however important to recognise that the ONS 2014 data already project that net international migration to England will reduce from 304,700 persons in 2014-15 to 169,500 per

year from 2020-21 onwards; so rates would need to be lower than this for the population and associated household projections to reduce[2].

Figure 2.11 - Components of projected population growth to 2033
Source - ONS, 2014-based Subnational population projections



2.17 The District is largely rural and over 92% of the land is currently designated as being in the Metropolitan Green Belt. Agriculture is mainly arable, particularly in the north east of the District. There is a significant amount of horse keeping in parts of the south and glasshouse horticulture is a prominent land use in parts of the Lea Valley especially in Roydon and Nazeing. The District has two towns and four district centres – Loughton/Loughton Broadway and Buckhurst Hill in the south, Waltham Abbey to the west, Epping in the centre of the District, and Chipping Ongar towards the east. Epping, Chipping Ongar and Waltham Abbey are market towns of medieval origin. Villages and smaller settlements are dispersed throughout the rest of the District. Several of these villages are also designated as conservation areas. The overall result is a significant concentration of population in the south of the District – the combined populations of Buckhurst Hill, Chigwell and Loughton/Loughton Broadway (55,473) accounted for about 44.5% of the District total as of the time of the 2011 Census.

2.18 The countryside of the District is gently undulating, dissected by two river valleys (the Lea and the Roding) and their tributaries. The District has an abundance of areas of importance for conservation and leisure for both the local and London's population. Epping Forest, which is owned and managed by the City of London Corporation, is a key natural feature of the District. The main part of the Forest runs from Wanstead (in London) along the north-west boundary of

[2] Note on updating the Overall Housing Need based on 2014 based projections for West Essex and East Herts (ORS, August 2016)

Buckhurst Hill, Loughton and Theydon Bois and extends to the southern end of Epping. A separate area (The Lower Forest) abuts Epping on its north-eastern edge.

2.19 The whole of Epping Forest south of Epping is a 'Special Area of Conservation', designated in 2005, and as such it has special protection under the European Habitats Directive (designed to protect a variety of wild animals, plants and habitats). The Lower Forest is also one of 8 'Sites of Special Scientific Interest' in the District which also affords a significant degree of protection. Nearby, the Turnford and Cheshunt pits in the Lea Valley are a 'Special Protection Area' which falls partly within the District. Special Protection Areas are internationally important for birdlife, and in this instance for wetland birds. There is also a designated Lea Valley 'Ramsar' site (a wetland of international importance), covering the part of the Turnford and Cheshunt pits within Epping Forest District.

2.20 Nine local nature reserves have been designated and the Essex Wildlife Trust has identified over 220 local wildlife sites. In addition to Epping Forest there are several other ancient woodlands in the District, including remnants of Hainault Forest, together with a significant number of ancient and veteran trees[3], including hedgerow pollards.

2.21 Most of the western edge of the District (excluding the built-up areas of Waltham Abbey and Nazeing) is included in the Lee Valley Regional Park (LVRP). This is managed by the LVRP Authority as a place for leisure, recreation, sport and nature conservation.

2.22 Built and natural heritage features are an important part of the character of the District. 25 conservation areas have been designated and there are over 1,300 statutorily listed buildings. There are currently a further 300 "locally listed" buildings. In addition, there are over 30 scheduled monuments ranging from the earthworks of a Norman castle, to a Second World War fortification. There are also several registered parks and gardens.

2.23 Construction from the mid to the late 19th century of what is now part of the London Underground Central Line, and the proximity to London, have greatly influenced the scale and location of development in the District. Significant growth of Buckhurst Hill and Loughton/Loughton Broadway and, to a lesser extent, Chigwell, Epping and Theydon Bois, followed the development of the railway. The post-World War II London overspill estates led to considerable expansion of Waltham Abbey and Loughton Broadway (also known as Debden).

2.24 The District's two town centres: Epping and Loughton Broadway and four district centres: Loughton High Road, Chipping Ongar, Buckhurst Hill and Waltham Abbey are the main retail/service centres. These centres are all fairly small compared with much larger centres nearby – notably Brookfield Shopping Park (in Broxbourne Borough), Chelmsford, Harlow Town, Romford and Westfield Stratford City; this causes significant and growing competition. In common with all other main retail/service centres, the growth of internet shopping is also an increasing threat to the viability and vitality of the District's retail/service centres.

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[3] "An ancient tree is in its third or final stage of life….A veteran tree is usually in its second or mature stage of its life". (The Woodland Trust, http://www.woodlandtrust.org.uk/visiting-woods/ancient-tree-hunt/what-are-ancient-trees/).

2.25 Economic activity rates in the District are high for both men and women, as shown in Figure 12, with 76.9% of 16-64 year olds in employment in April 2015 to March 2016; this number is higher than the average for England as a whole (73.9%), and very slightly lower than the average for the East of England (77%)[4]. Within this overall employment, male employment was 80.4%, and female employment was 73.5%. Self- employment accounted for 13.9% of all people employed in the District, compared to 10.3% in the East of England and 10.4% in England as a whole; demonstrating strong entrepreneurship in the local area. In June 2016 only 1.1% of 16-64 year olds were claiming Job Seekers Allowance, compared with 1.2% in the East of England and 1.7% nationally[5].

Figure 2.12 - Comparison of economic activity of people aged 16+, April 2015-March 2016
Source - NOMIS, Labour Market Profile

		Epping Forest (%)	East of England (%)	England (%)
All People aged 16-64	Economically Active[6]	80.4	80.2	78
	In Employment	76.9	77	73.9
	Employees	63	66.4	63.1
	Self Employed	13.9	10.3	10.4
	Unemployed	3.4	3.8	5.1
Males aged 16-64	Economically Active	86.6	86.2	83.6
	In Employment	80.4	82.7	79.2
	Employees	59.5	68.7	64.7
	Self Employed	20.9	13.8	14.1
	Unemployed	≠	3.9	5.1
Females aged 16-64	Economically Active	74.5	74.3	72.5
	In Employment	73.5	71.4	68.8
	Employees	66.2	64.3	61.6
	Self Employed	≠	6.8	6.8
	Unemployed	≠	3.8	5

≠ These numbers are not available as Government's sample size is too small to provide an estimate, or because the numbers are so small they would disclose personal data, so

[4] NOMIS, Labour Market Profile for Epping Forest District, downloaded August 2016
[5] It is important to note that the number of people claiming Job Seekers Allowance is not the same as the number of unemployed people. Job Seekers Allowance is an unemployment benefit that can be claimed by people who are looking for work. Unemployment is broadly defined as people who are out of work and seeking a job, but some of these may not be claiming Job Seekers Allowance, for example recently graduated students living at home with parents while seeking a job may choose not claim Job Seekers Allowance.
[6] 'Economically active' means people who are working or are unemployed (i.e. they would work if they could find a job). 'Economically inactive' means people who are not working and don't want to find a job, for example retired people, or those who look after children at home full-time.

Government suppresses that data. Please note totals may not sum due to rounding and suppression of numbers where the sample size is too small.

2.26 The types of work undertaken by workers within the District are set out in Figure 13. The types of jobs are categorised into Standard Occupation Classification (SOC) groups 1 to 9. Figure 13 shows that in 2015-16 the District had more of the 'higher' classification jobs, such as managers, professional occupations etc., than the average for the East of England, or England as a whole.

Figure 2.13 - Comparison of employment rate aged 16+ by occupation group April 2015-March 2016
Source - NOMIS, Labour Market Profile

	Epping Forest DC (%)	East of England (%)	England (%)
SOC groups 1-3 total	**47.7**	**44.2**	**45.1**
1. Managers, Directors and Senior Officials	14.8	10.3	10.6
2. Professional Occupations	17.4	19	20
3. Associate Professional & Technical	15.5	14.7	14.3
SOC groups 4-5 total	**24.5**	**22.5**	**21.1**
4. Administrative & Secretarial	11.7	11.2	10.6
5. Skilled Trades Occupations	12.9	11.3	10.4
SOC groups 6-7 total	**13.8**	**16.2**	**16.7**
6. Caring, Leisure and Other Service Occupations	8.5	9	9.1
7. Sales and Customer Service Occupations	≠	7.2	7.5
SOC groups 8-9 total	**13.9**	**17.2**	**17.1**
8. Process Plant & Machine Operatives	7.7	6.5	6.4
9. Elementary Occupations	≠	10.6	10.7

≠ These numbers are not available as Government's sample size is too small to provide an estimate. Please note totals may not sum due to rounding and suppression of numbers where the sample size is too small.

2.27 A large proportion of businesses in the District in 2015 were 'micro' (0 to 9 employees – one person who is self-employed and has no employees counts as zero) or 'small' (11- 49 employees), as shown in Figure 14. The District has a higher proportion of 'micro' businesses than the averages for Essex, the East of England or England as a whole, showing how important they are to the local economy.

Figure 2.14 - Comparison of business size, 2015
Source - NOMIS, UK Business Counts

Type	**Area**	**Size** (in terms of no. of employees)

		Micro (0 to 9)	**Small** (10 to 49)	**Medium-sized** (50 to 249)	**Large** (250+)
Enterprises*	**Epping Forest DC %**	91.50%	7.10%	1.20%	0.20%
	Essex %	89.50%	8.90%	1.40%	0.30%
	East of England %	89.20%	8.90%	1.50%	0.40%
	England %	88.80%	9.20%	1.60%	0.40%
Local units**	**Epping Forest DC %**	89.00%	9.20%	1.60%	0.10%
	Essex %	85.40%	12.10%	2.20%	0.30%
	East of England %	84.60%	12.60%	2.50%	0.40%
	England %	83.90%	13.00%	2.70%	0.40%

Please note totals may not sum due to rounding
** An 'enterprise' is a 'company' which <u>might</u> have more than one location, such as a factory and a depot.*
*** A 'local unit' is only ever at one location, such as one shop. An enterprise <u>may</u> consist of only one 'local unit', such as a bakery which operates and sells in only one shop. This is why the numbers for 'enterprises' and 'local units' are similar.*

2.28 There is also a high level of business start-ups in the District. Between 2009 and 2014 there was an 11.7% rise in the number of active enterprises in the District, which is higher than the percentage rise for Essex overall (7.60%), for the East of England region (6.45%) and for England as a whole (9.57%)[7].

2.29 In 2015, the proportion of the District's residents with no qualifications was lower than the average for the East of England and for England as a whole, as shown in Figure 15. However, less of the District's residents had qualifications from an NVQ1 or above, to an NVQ 3 or above, than the average for the East of England or the average for England as a whole. Nevertheless, there are more of the District's residents with NVQ4 and above (i.e. all higher education qualifications) than the average for the East of England.

Figure 2.15 - Comparison of qualification level Jan 2015-Dec 2015
Source - NOMIS, Labour Market Profile (ONS annual population survey)

Qualification level	Equivalent to	Epping Forest DC (%)	East of England (%)	England (%)
NVQ4 and above	HND, Degree and Higher Degree	34.9	33.6	36.8
NVQ3 and above	2 or more A levels	52.4	53.5	57.1
NVQ2 and above	5 or more GCSEs at grades A-C	70.9	71.5	73.4
NVQ1 and above	Fewer than 5 GCSEs at grades A-C	84.3	84.9	85

[7] NOMIS, UK Business Counts, 2015

Qualification level	Equivalent to	Epping Forest DC (%)	East of England (%)	England (%)
Other Qualifications	n/a	8.5	7.1	6.6
No Qualifications	n/a	7.2	8	8.4

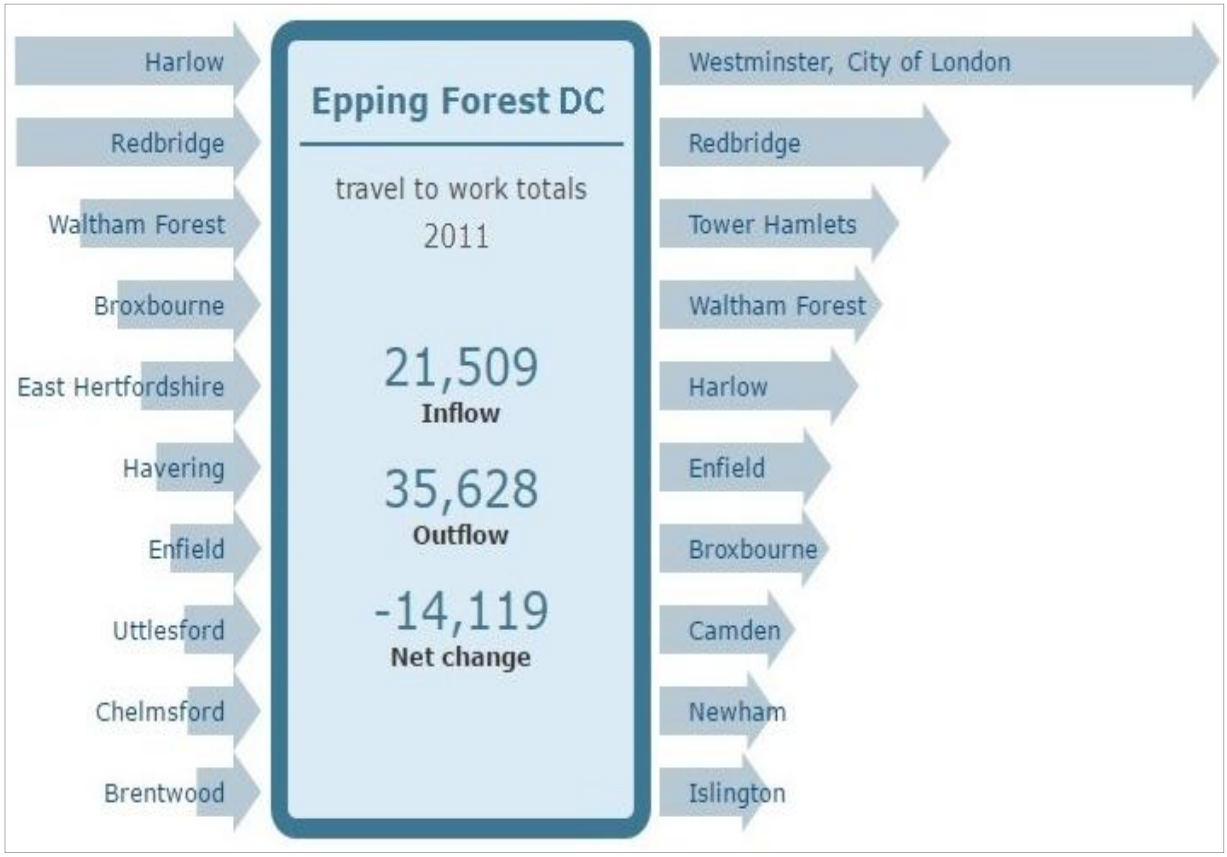
Please note totals may not sum due to rounding.

2.30 In addition to the main retail/service centres, the main employment sites within the District are in Loughton Broadway, Epping, Nazeing, North Weald Bassett (including the Airfield) and Waltham Abbey, where the larger industrial estates are located. Around half of the District's working residents commute out of the District for work, with the largest proportion travelling to London[8].

2.31 Figure 16 is a visualisation indicating, on the left, people who travelled into the District from elsewhere to work in 2011, and on the right, people who commuted out of the District to work elsewhere in 2011. The length of the arrows indicates the proportion of people who commute to or from these locations. The visualisation shows that the greatest number of those who commuting into the District come from Harlow and the London Borough of Redbridge, and the greatest number of District residents commuting out go to Westminster (City of London), and boroughs within London.

Figure 2.16 - Travel to work visualisation, 2011
Source - NOMIS, adapted from Location of usual residence and place of work by method of travel to work visualisation[9]

[8] Detailed EFDC Economic Report 2015, Hardisty Jones Associates
[9] https://www.nomisweb.co.uk/census/2011/WU03EW/chart/1132462184

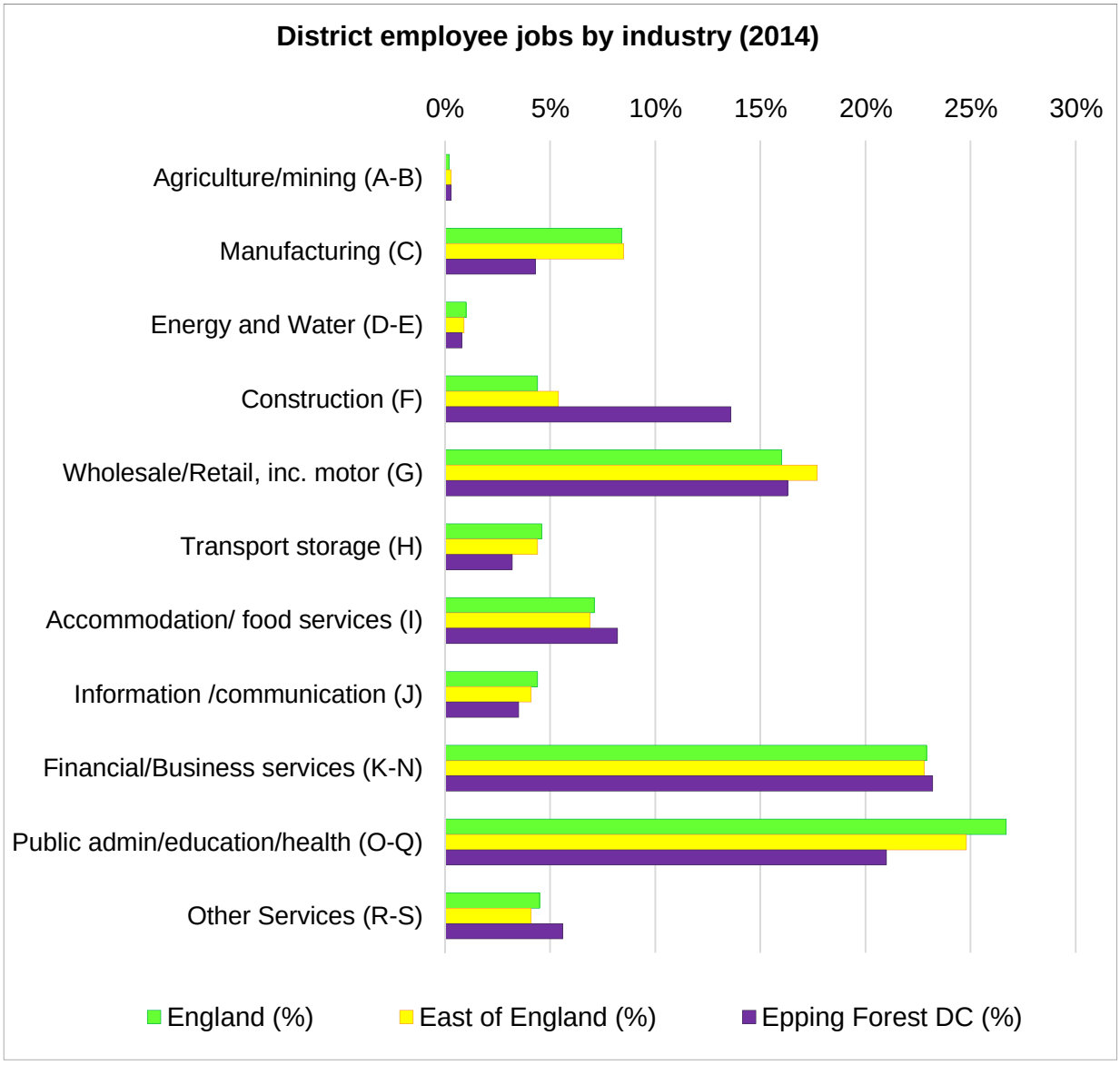


2.32 In 2014 there were 44,100 employee jobs based in the District, of which approximately 64.8% were full-time and 35.2% part-time.

2.33 Figure 17 shows the breakdown of all the employee jobs by industry, highlighting that the District is particularly strong on jobs related to 'Construction', far outstripping the East of England and England average percentages. It is also stronger than average on 'Accommodation and Food services', and on 'Financial and other business services'.

Figure 2.17 - Comparison of employee jobs by industry (2014)
Source - NOMIS, Labour Market Profile, Employee jobs by SIC code section A to S[10]

[10] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/455263/SIC_codes_V2.pdf

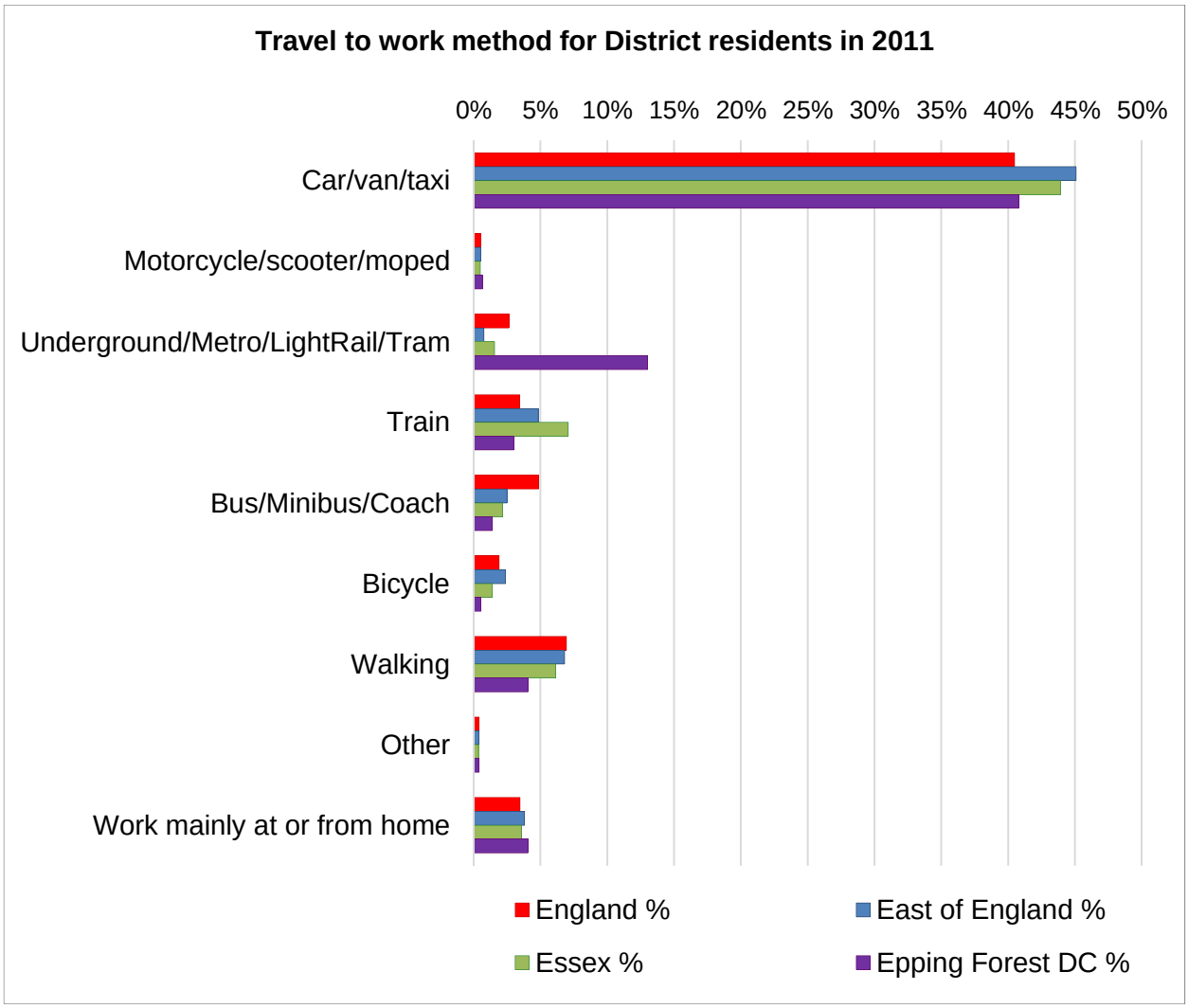


2.34 Large employers in the District include: Kier and Higgins (with headquarters in Loughton Broadway); Sainsbury's (with a distribution centre in Waltham Abbey and stores in Loughton, Loughton Broadway and Ongar), Tesco in Waltham Abbey, Epping Forest District Council, Sports and Leisure Management (SLM, which manages the Epping Forest District Council's leisure centres), Essex County Council, the National Health Service, the Bank of England Printing Works, Epping Forest College and the working glasshouses which form the Epping Forest District part of the Lea Valley glasshouse industry.

2.35 District residents most commonly travel to work using a car or van (or taxi), as in Figure 18, following the pattern for Essex, the East of England and England as a whole. However, there is far higher use of 'Underground, metro, light rail or tram' public transport for commuting from the District than any of those other three areas, due to the proximity of London and the presence of many London Underground Central Line stations in the District.

Figure 2.18 - Travel to work method for District residents (aged 16-74) in 2011

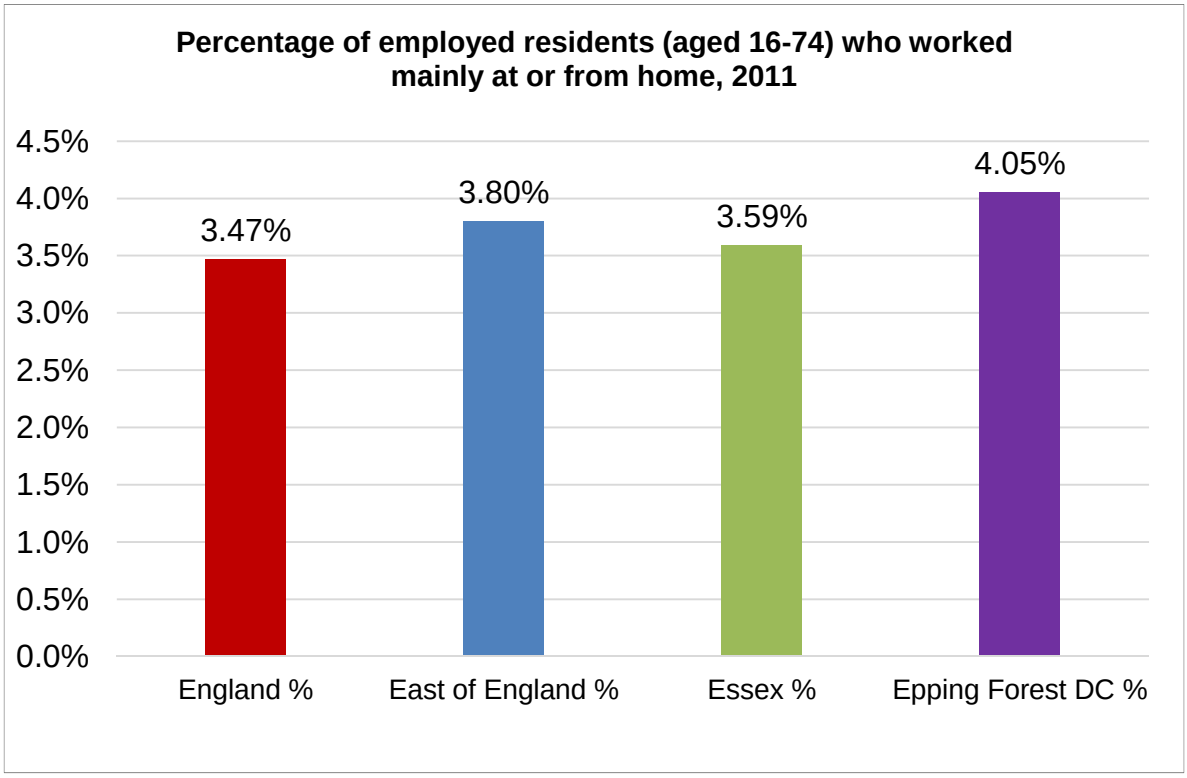
Source - NOMIS, Labour Market Profile, Employee jobs by SIC code section A to S[11]



2.36 There is evidence of proportionally high levels of working from home in the District, as shown in Figure 19. In 2011, 4.05% of the District's employed residents (16-74 years) worked 'at or from home', which was slightly higher than the average numbers for Essex, the East of England region, and in England as a whole.

Figure 2.19 - Percentage of employed residents (aged 16-74) in employment who worked mainly at or from home, 2011
Source – ONS, Travel to work data

11 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/455263/SIC_codes_V2.pdf



2.37 Government's Indices of Deprivation (2015)[12] measure how deprived a 'Lower Super Output Area (LSOA)' area (this is usually equal to or smaller than an electoral Ward) is compared with all of the other areas in the country, using a range of indicators. It then ranks them in order of deprivation with 1 being the most deprived area in the country, and 32,844 being the least deprived. There are a total 78 Lower Super Output Areas within the District.

2.38 The majority of the District experiences less 'deprivation'[13] than the rest of the country, according to the Indices of Deprivation (2015). However, there are pockets of deprivation within the District when looking at factors including access to housing and services, and adult skills.

2.39 Overall, measures for health are good, however the rankings show that there is some variation at a more localised level. Although average life expectancy is higher than the national average, it varies significantly in different areas within the District. It is 5.3 years lower for men and 4.6 years lower for women in the most deprived areas compared with in the least deprived areas.

2.40 Figure 20 shows how many of the 78 fall within the different categories of deprivation nationally; the 'hotter' the colour, the more deprived the category. None of the areas within the District ranked within the 10% most deprived nationally (also known as the 1st decile). Parts of Loughton Alderton and Waltham Abbey Paternoster wards were ranked within the 20% most

[12] https://www.gov.uk/government/statistics/english-indices-of-deprivation-2015
[13] Please note that 'deprivation' within the Indices of Deprivation (2015) does not just cover things like income and employment. Some areas can be a measured as being a little 'deprived' because they have fewer services within easy reach than other areas do, or that the resident adults have fewer qualifications than adults in other areas.

deprived (2nd decile), with parts of Grange Hill, Waltham Abbey North East and Waltham Abbey High Beach wards in the 30% most deprived (3rd decile).

Figure 2.20 – Broad ranking of areas within the District by the Indices of Deprivation 2015
Source – English Indices of Deprivation 2015

Category of deprivation	Number of the District's Lower Super Output Areas in this category
1st decile (10% most deprived nationally)	**0**
2nd decile	2
3rd decile	3
4th decile	15
5th decile	10
6th decile	8
7th decile	9
8th decile	12
9th decile	14
10th decile (10% least deprived nationally)	**5**
Total	**78**

2.41 The District's pockets of deprivation are found both in urban and rural areas. The rural areas often (but not exclusively) score worse on the Index of Multiple Deprivation solely due to sub-rankings relating to the distance to specific local services and access to affordable housing.

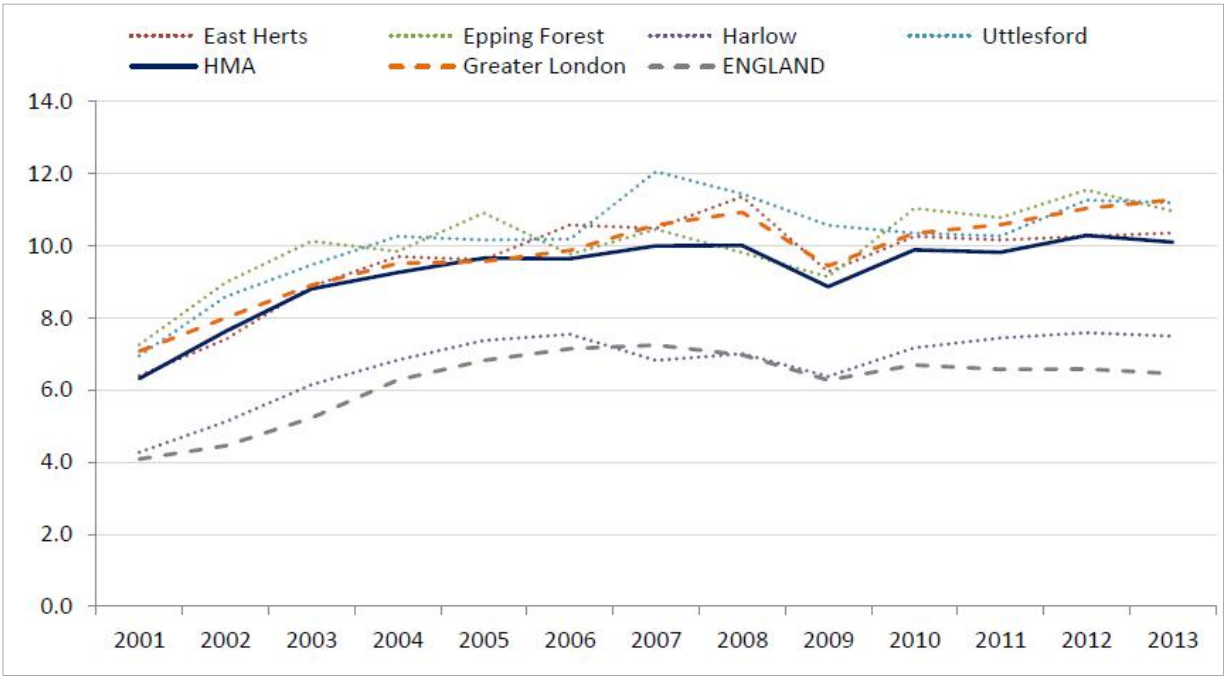
2.42 Housing affordability in the District has been a significant problem in more recent times. This is the same for similar areas situated on the border of Greater London, which are attractive to city commuters.

2.43 Figure 21 shows a measure of the affordability of housing over time, measured by comparing house prices to earnings (see the note at the bottom of the Figure for more details). The lower the ratio, the more affordable the housing is relative to earnings.

2.44 As Figure 21 shows, over 2001-2013 housing was less affordable in the District than in England as a whole, and broadly comparable to that in East Herts District, Uttlesford District and Greater London as a whole.

2.45 It is important to remember that affordability can be influenced by supply issues (e.g. housing delivery levels) and demand issues (e.g. lower availability of mortgage finance for first time buyers).

Figure 2.21 – Ratio of Lower Quartile House Price to Lower Quartile Earnings 2001-2013
Source – West Essex and East Hertfordshire Strategic Housing Market Assessment 2015



** This Figure measures affordability through the ratio of the lowest (25th) percentile of house prices in the area to the lowest (25th) percentile of earnings in the area. The 25th percentile is the value quarter of the way through the range when ordered from the lowest to the highest.*

2.46 The Council's own housing waiting list stood at 1,360 households in August 2016. It has in previous years been significantly higher, but it dropped in 2013 when a revised Housing Allocations Scheme was applied, requiring applicants to have lived within the Epping Forest District for at least 3 years (or 2.5 for current residents).

2.47 Government defines affordable housing need as households 'who lack their own housing or live in unsuitable housing and who cannot afford to meet their housing needs in the market'[14]. Figure 22 shows the projected need for affordable housing (measured in households) in the District (and in East Herts, Harlow and Uttlesford Districts) from 2011-2033.

2.48 These numbers take into account current unmet need for affordable housing and starter homes, projected future need arising from new households which will form in the future, and also the number of existing households which are likely to falling into need in future. Further breakdowns of need by for example size of dwelling, are shown in the Strategic Housing Market Assessment (2015).

[14] Planning Practice Guidance, Paragraph: 022 Reference ID: 2a-022-20140306

Figure 2.22 – Overall affordable housing need (in households) 2011-33
Source – West Essex and East Hertfordshire Strategic Housing Market Assessment 2015

	Affordable Housing Need (in households) *				
	East Herts DC	**Epping Forest DC**	**Harlow DC**	**Uttlesford DC**	**HMA Total**
Unmet need for affordable housing in 2011					
Total unmet need for affordable housing	1,632	1,171	1,597	818	5,218
Supply of housing vacated	471	544	849	242	2,106
Overall impact of current affordable housing need	**1,161**	**627**	**748**	**576**	**3,112**
Future need for affordable housing 2011-33	2,967	2,525	2,541	2,148	10,179
Total need for affordable housing 2011-33	**4,128**	**3,152**	**3,289**	**2,724**	**13,291**
Percentage of overall housing need	31%	34%	67%	27%	35%

NB - this Figure shows affordable need in households, not dwellings

2.49 The horticultural glasshouse industry has a long-standing and visible presence in Epping Forest District, as the larger part of a concentration of activity in the Lea Valley. This has somewhat declined from its peak in the 1950s as it is in competition with overseas growers. Nevertheless it still provides significant crops for the London and UK markets.

2.50 Most of rural Epping Forest District lies in the Green Belt, yet there is a need to maintain economic vitality in the rural parts of the District. This could be through farm diversification, re-use of redundant buildings and some limited development that is suitable within the Green Belt.

Key issues for the Plan to address

2.51 There are several important issues that the Plan must address. More detail about them is found in Chapter 3 and the themes in Chapter 4. They include:

- ensuring that sustainable development is achieved, and that climate change is addressed in the draft policies and proposals of the Plan

- how to manage and accommodate the needs of the current and future population and the future economic needs of the District – indicated by the evidence to be approximately 11,400 new homes and the creation of 10,000 new jobs over the Plan period (2011-2033). This will need to be supported by necessary infrastructure;

- there is very little land remaining in the District within the settlements that is not already developed - in order to plan properly for the future, a District-wide review of the Green Belt has been undertaken to identify the potential for future development;

- the continued protection of the remaining Green Belt once the final plan proposals are in place and in particular preventing the merging of settlements and checking the unrestricted sprawl of large built-up areas;

- a recognised need for significant regeneration of Harlow, which will be supported by the development of the Harlow Enterprise Zone, together with significant growth in new homes;

- the need to ensure a housing stock that matches the needs of the population, including catering for an ageing population and more single person households than we have seen before, providing affordable housing and starter homes for those who cannot afford market prices and assessing the needs of, and providing for the Traveller and Travelling Showpeople communities;

- providing the right type of sites for jobs in the right locations;

- establishing which existing employment sites, if any, should be released for other purposes;

- encouraging new uses and activities to ensure the survival, vitality and viability of the District's six town and district centres in response to growing competition;

- protecting local services in the District's rural areas and facilities in villages;

- providing for future rural retail and commercial development, rural employment and supporting agriculture and horticulture whilst ensuring that unused horticultural and other agricultural buildings are reused;

- addressing the transport needs of current and future populations for both rural and urban populations along with many other infrastructure needs such as health, education, community spaces and places, faith, culture, sport and leisure opportunities;

- the management of congestion, HGVs on local roads , and provision of opportunities for walking, cycling and public transport, in addition to the management of commuter parking around London Underground stations;

- protecting and improving the impressive range and quality of places for enjoyment of the outdoors, sport and nature conservation in the District; and

- protecting and enhancing historical artefacts and buildings, protected trees, hedgerows and landscape.

2.52 The Council has produced this plan in close cooperation with partner organisations such as Essex County Council, the Environment Agency, Natural England, SHMA partners and adjoining authorities. The successful implementation of the Plan depends upon a range of agencies and organisations, as well as the private sector and developers. The Epping Forest District Local Plan will provide the future framework for the District up until 2033.