Appendix 2

Baseline data for the Core Strategy

Issue/Challenge:	Current State:	Trends:	Source of Information:
Management of Transport	• 70.4% of people travel by car, 3% by public transport, 2.6% by bicycle and 9.4% walked. • There is general lack of public transport in rural areas. • There is lack of evening bus service with associated social exclusion. • High car ownership. 86% of households have access to a car. About 47% have 2 cars or more. This is amongst the highest in the country. 6,400 households do not have a car. • Traffic has increased 13% over the last 10 years. • There are 9 District Council managed car parks with total capacity of 2413. Currently there is about 1066 pay and display on street parking bays. There is 720 space park and ride. Noticeable commuter parking in residential streets, effective parking enforcement. • In 2004 there were 485 road accidents in the District. • Casualty rate per 1000 population is 6.16 (2004), which is above national average of 5.02 and Warwickshire average of 5.77. • In 2003, 182 people were killed or seriously injured in road accidents in the District. • Capacity at certain junctions are at or near limit. • There is increased congestion particularly during peak hours.	• Recent increase in bus patronage. Annual bus patronage figures for 2004/05 was 11.1m compared to 10.7m in 2003/04. • National figures show a decline in usage. • Amount of traffic continues to increase. • There is local perception of increased congestion • Major investment in parking supply and enforcement, • improved access through (Urban Traffic Management and Control (UTMC) and signage. • Overall number of spaces increased but in the form of park and ride • Patronage in the use of park and ride continue to increase. • Number of road accidents in Warwickshire reduced by 10% between 1994 and 2004. Within this data, number killed or seriously injured reduced by 28%. • Increased traffic volume, • reduced number of accident • better managed on street parking.	• Census 2001 • the Community Plan • Local Transport Plan (LTP) • Parish Plans • Demand Management Study • County Council Traffic Data • resident surveys • Parking studies • Stratford Major Schemes Bid • Parking Services information packs • National Statistics • Warwickshire Road Casualty Data (2004) .

Issue/Challenge:	Current State:	Trends:	Source of Information:
Responding to Climate change	• Government Panel on Climate Change (IPCC) has confirmed that the temperature of world's atmosphere is warming. • Global average temperature could rise between 1.4 – 5.8 degrees Celsius above 1990 levels by 2100. • Sea levels could rise by 0.09 – 0.88 metres compared to 1990 levels by 2100. • UK target to reduce greenhouse emissions by 12.5% from 1990 levels by 2010, • There is continuous search for measures to deal with the consequences of global warming. • Proportion of the world's greenhouse gases emitted by U.K is 1.94% compared with 20.58% in USA and 14.67% in China. • Current level of carbon dioxide in the atmosphere is around 430 parts per million compared with 280ppm before the industrial revolution. • With a worst-case scenario of global increase of atmospheric temperature of between 5 and 6 degrees it is estimated that the global economy will shrink by 20%. • Percentage of households experiencing fuel poverty in West Midlands in 1996 was 26.9% compared to 10.9% in 2001. • Emission of CO2 per head in West Midlands is 1700 (kg carbon).	• Ten warmest years since 1861 occurred since 1994. • No consistent regional data but there is continuous increase in world's atmospheric temperature. UK estimates suggest rises in annual average temperature of 2 degrees to 3.5 degrees by 2080. • Increasing emphasis on renewable energy use, • Lots of political rhetoric about global warming, • Encouragement for everybody to play a part. • New policy framework is moving towards carbon pricing and encouragement for the market to take up green technologies. • Businesses are encouraged to cut emissions through carbon trading. • There in increasing decline in fuel poverty.	• Government Climate Change Programme (March 2006) • Kyoto Protocol • Sir Nicholas Stern's Report on Climate Change (October 2006)

Issue/Challenge:	Current State:	Trends:	Source of Information:
Predicted impacts of Climate Change		• The UKCIP02 model predicts that, if we continue to discharge large amounts of greenhouse gases, by 2050 in the West Midlands: • Annual mean temperatures could rise by up to 2.5ºC, with summer temperatures increasing by more and winter temperatures by less. • The number of very hot summer days is expected to increase. • Warwickshire and the south east of the region are expected to warm up more than Shropshire and the north of the region • Winter rainfall could increase by up to 20% • Summer rainfall could decrease by up to 30% • Soil moisture could fall by up to 35% • There will be a higher risk of extreme weather events such as storms, floods and droughts.	The UK Climate Change Impacts Programme www.ukcip.org.uk
Reducing carbon emissions	• Domestic energy consumption accounts for just under a third (30.5 percent) of final energy • consumption in Warwickshire (total 18,027 GWh). • Industry and commerce accounts for a further 28 percent and transport	• To achieve Koyoto targets, carbon dioxide emissions needs to reduce to 4,200 kt per annum by 2010, 3,600 by 2020 and to 1,900 by 2050. • Projected emissions	Warwickshire Energy Statistics; report for Warwickshire County Council; baseline data for Climate Change strategy (June 2005, Report uses 2003 data)

Issue/Challenge:	Current State:	Trends:	Source of Information:
	accounts for the largest part with over 41 percent. • The largest fuel type consumed is oil (47.5 percent). • Carbon dioxide emissions are 4,600 kt per annum.	reductions based on recent trends would be about 13% reduction by 2050 compared to Kyoto target of 60%.	
Reducing carbon emissions	• The CO_2 emissions from West Midlands production, which includes goods for export, is 9.4 t/cap (below the UK average by 10 per cent). • The CO_2 emissions from West Midlands consumption, which includes goods from imports, is 11.5 t/cap (below the UK average by 5 per cent). • In terms of CO_2 emissions, the most resource-intensive sector is the cement industry, followed by electricity generation. • The consumption type with the highest impact is domestic energy consumption followed by household car use. • The consumption type with highest overall impact per £ spent is electricity generation.	• In the West Midlands CO_2 consumption rates per capita are higher than production rates per capita. • The data suggests that the first target for any regional sustainability strategy is to reduce the demand for electricity and car travel.	Counting consumption: CO_2 emissions, material flows and ecological footprint of the West Midlands (WWF-UK, 2006) available on the West Midlands Regional Observatory www.wmro.org.uk
Reducing carbon emissions		• Total carbon dioxide emissions for region increased from 42.6 Mt/yr in 2002 to 43.1 Mt/yr in 2004. • The energy intensity of industrial/ production is reducing slightly – improving the Kwh per £ GVA • Regional Electricity	West Midlands Regional Energy Strategy Monitoring Report 2006 (West Midlands Regional Observatory)

Issue/Challenge:	Current State:	Trends:	Source of Information:
		Consumption – increase from 32,845 GWh/yr in 2002 to 33,433 GWh/yr in 2004 • Carbon dioxide emissions from domestic energy use have increased slightly from 12.6 Mt/yr (2002) to 12.7 Mt/yr (2004) but this is because of an increase in dwellings, with the average emissions per dwelling falling slightly. • Carbon dioxide emissions from transport have increased between 2002 and 2004, as have the percentage of trips made by car, and the average annual mileage by car.	
Use of renewable energy		• The national target is 10% of electricity supplied to come from renewable sources by 2010 and • 15% by 2015. Having considered the resources of the West Midlands this Strategy recommends: • Renewable generation equivalent to 5% of electricity consumption by 2010 and 10% by 2020. The • 2010 target is equivalent to: up to 75 MW of landfill gas fuelled generators, 100 1.5 MW wind	West Midlands Regional Energy Strategy (Nov 2004, Developed by a partnership steering body with support from WMRA, AdvWM, GOWM)

Issue/Challenge:	Current State:	Trends:	Source of Information:
		• turbines and 27 1MW biomass/biogas powered generators.	
Use of renewable energy	• Renewables capacity in Warwickshire is 17.4MW per annum and is virtually all landfill gas. • The output is equivalent to 3% of the county's electrical demand which is higher than the national average.	• In the long term it is likely that the amount of landfill gas available and hence the electricity which can be generated from it will decline.	Warwickshire Energy Statistics; report for Warwickshire County Council; baseline data for Climate Change strategy. (June 2005, Report uses 2003 data)
Use of renewable energy		• Percentage of energy consumption from renewables in the West Midlands region increased very slowly between 2002 and 2004 – 1.8 % 2002, 1.9 % 2004 • Renewable energy capacity and use of biofuels in the region is also increasing slowly from 2002-4.	West Midlands Regional Energy Strategy Monitoring Report 2006 (West Midlands Regional Observatory)
Use of renewable energy	• Following the identification of the initiative through a Parish Plan, one community has worked with a local Housing Association to provide Ground Source Heating for new and existing properties in a village without mains gas.	• 5 adopted Parish Plans identify unreliable electricity and lack of mains gas as significant issue for the community, out of the 24 Parish Plans adopted in the district up to Dec '07. Another Parish Plan has an aim to encourage energy efficiency.	Main themes in Parish Plans from the Parish and Town Plans adopted by Stratford-on-Avon District Council up to Dec 2007 (SDC Planning Policy team, unpublished)
Use of renewable	• For Suburban Medium Density Housing: - Ground source heat, Biomass and solar		London Renewables Toolkit (Greater London Authority,

Issue/Challenge:	Current State:	Trends:	Source of Information:
energy	water heating will add between 1 and 3% to base build cost while achieving more than 10% reduction in emissions. - Solar PV and wind to meet 10% is about 6.5% of base build. • The costs for renewables here are calculated as “capital cost rate (extra)” which takes into account the cost of conventional technology or building components replaced. • Renewables can add quality and value to development, and reduce running costs making them a good investment.		2004) Table 4.12.10
Use of renewable energy	• The report reviewed the costs, technical viability and economic viability of achieving energy reductions for a range of residential and non-residential case studies. It concluded that the following would be technically and financially viable for the South-West: 2008-10 Residential 10+dwellings 44% emissions reduction from 2006 Building Regs Non-residential 25% reduction 2011-2015 Residential 10+ dwellings 100% reduction Non-residential 35% reduction 2016 onwards Residential 10-50 dwellings 100% reduction		Supporting and delivering zero carbon development in the South West; Final Technical Report (Prepared for South West Regional Assembly by Faber Maunsell and Peter Capener, Jan 2007

Issue/Challenge:	Current State:	Trends:	Source of Information:
	Residential 50+ dwellings zero carbon in terms of Building Regulated emissions and other emissions Non-residential 60% reduction		
Sustainable Construction	• The estimated 2008 costs of compliance with Code using best, medium and worst case scenarios, and assuming in all cases that no electricity generation from wind turbines is possible: • Detached house - Level 3 costs £4,751-£5,641 extra, or a 5-6% increase in building costs on baseline of 2006 Building Regs. Around 82% of this cost comes from meeting the required Energy standards. • Level 4 costs £11,593-£13,529 extra, or a 13-15% increase in building costs on baseline of 2006 Building Regs. Around 84% of this cost comes from meeting the required Energy standards. • End-terrace house – • Level 3 costs £4,927-£5,801 extra, or a 7-8% increase in building costs on baseline of 2006 Building Regs. Around 72% of this cost comes from meeting the required Energy standards. • Level 4 costs £8,415-£9,490 extra, or an 11-13% increase in building costs on baseline of 2006 Building Regs. Around 75% of this cost comes from meeting the required Energy standards. • Flat – • Level 3 - 4% higher building costs than 2006 Building Regs. Around 88% of this cost comes from meeting the required	• The likely change in costs over time for meeting the energy section of the Code has been studied in most detail. It is predicted that, compared to 2008 costs, costs for meeting Level 4 of the energy section of the Code will reduce by: 3% by 2010 6% by 2013 10% by 2016 19% by 2025 • Costs will reduce most quickly for the higher levels of the Code, for example the cost of achieving Level 6 of the energy section of the Code will reduce by 35% by 2025. • It is predicted that the costs to achieve all other aspects of the Code will also reduce because of the following factors: • Learning effects similar to those modelled for energy • Some innovative products will become standard across whole sector • Industry will develop	Cost Analysis of the Code for Sustainable Homes Final report (CLG, July 2008)

Issue / Challenge:	Current State:	Trends:	Source of Information:
	Energy standards. • There is a substantial increase in cost between Code levels 5 and 6. All costs would be lower for a scheme using wind power.	products that are guaranteed to reach a certain standard, removing the need for individual testing of performance. • Using the information in this report suggests that meeting the Energy standards required as a minimum for each level of the Code is a very significant proportion of the additional cost of building to each level. From 2010 Level 3 on the Energy standards will be mandatory through Building Regulations. Therefore from 2010 the additional costs for meeting the other aspects of the Code not already required for Building Regulations will be an average of £710 for a detached house, £1,360 for an end terraced house and £246 for a flat. • From 2013 when Level 4 of the Energy standards is required through Building Regulations the additional aspects to meet the full Level 4 will cost an average of £1,943 for a detached house, £2,140 for an end terraced house and £827 for a flat.	

Issue/Challenge:	Current State:	Trends:	Source of Information:
Efficient use of resources	• The Regional Material Input (RMI) into the West Midlands economy is 10.9 tonnes per person (or tonnes per capita – t/cap) per year – primary materials from agriculture, mining etc., plus imports from overseas. • As much again is transferred back and forth in movements between the • West Midlands and other regions. More than one third of this – 3.6 t/cap – comes from overseas imports. • The average person directly purchases 1.8 tonnes of goods and products per year, and throws away nearly half of this over the same period. • Total waste coming from industrial, commercial and construction/demolition amounts to three times the household waste – more than 2 t/cap per year.		Counting consumption: CO2 emissions, material flows and ecological footprint of the West Midlands (WWF-UK, 2006) available on the West Midlands Regional Observatory www.wmro.org.uk
Efficient Use of Resources	• Local data is patchy. However the regional data provides some indication about the current state and trend in the efficient use of resources in the sub region. • Of the 847 dwellings completed between 2004 and 2005 40.1% were on previously developed land and 59.9% were on Greenfield land. During the same period24.5% of dwelling were completed on sites with densities of less than 30 dwellings per hectare, 62.9% on sites with density between 30 – 50 dwelling per hectare and 12% on sites with density above 50 dwellings per	• Total dwelling stock has increased by 2.4% between 2001 and 2005. • Households in rural areas consume less natural gas , but have higher relative levels of consumption for petroleum products. • Number of car trips made in the region has increased from an average 413 trips in 2002 to 434 trips in 2004. • Estimate of transport CO2 emissions are up by 1.8% between 2002 and 2004.	• Annual Monitoring Report (SDC) 2005. • A long term policy perspective for sustainable agriculture: environmental impacts – final report (August 2003)

Issue/Challenge:	Current State:	Trends:	Source of Information:
	hectare. • River water in most of the rural areas of west midlands is considered to be good quality. For example in 2000, 62% of river lengths were of good chemical quality and 94% were good or fair. England averages were 64% and 94% respectively. However, pesticide and nutrient run-off resulting from agriculture is a particular concern. For example, agriculture accounted for 29 out of a total of 251 category 1 and 2 pollution incidents in 2001 in the midlands as a whole. There is also a concern that groundwater from some of the regions aquifers is being abstracted at an unsustainable rate. • Of the 55 major aquifers in the west midlands, there are sustainability concerns about 16 and 11 are being utilised at their maximum limit. • Many of the main rivers have extensive floodplains.	• Demand for water will continue to rise with the household predictions. • Global warming is a potential threat to water management. • There is policy in the Local Plan Review to promote the provision of renewable energy.	
Efficient use of resources - water	• The Severn (which includes Stratford District) zone of the West Midlands is already in significant headroom deficit (target headroom is the minimum buffer that a water company should plan to allow between supply and demand).	• The Severn (which includes Stratford District) Birmingham and the South Staffordshire zones of the West Midlands are identified as at high risk of going into deficit of water supply based on RSS housing allocations. • Current Water Resources Plan for Severn area depends on several large new water resource developments up to 2030.	West Midlands Regional Spatial Strategy (RSS 11) Technical Work: The Impact of Housing Growth on Public Water Supplies (Environment Agency, June 2007)

Issue/Challenge:	Current State:	Trends:	Source of Information:
		Taking these into account, the additional housing allocations in RSS would have the following impact. Option 1: the zone goes into small short-lived deficit. Option 2: the zone goes into a significant deficit for 6 years in two time periods. Option 3: the zone to go into a significant deficit for 10 years in two time periods. - 8% water efficiency only has a small impact on the size and duration of the deficit for all options. - 25% water efficiency has a significant impact on the size and duration of deficit for all options. • Study recommends that RSS Revision has a policy on water efficiency, eg. requiring all new houses to meet level 3 of Code of Sustainable Homes, focusing on most sensitive/high risk resource zones. This level of the code requires good water efficiency to be achieved.	

Issue/Challenge:	Current State:	Trends:	Source of Information:
Local Air Quality	• Part of the centre of Stratford-upon-Avon was declared an Air Quality Management Area in 2006. • Air quality at some locations in Stratford, Studley and Henley-in-Arden exceed national objection target.	• There is reducing trend in regional air quality. • The District Council is considering whether to designate the whole of the centre of Stratford-upon-Avon and part of Henley as Air Quality Management Areas.	District Council website, Environmental Services Data.
Meeting Housing Needs	• In April 2008 there were 53,397 dwellings in the District. • Current Housing Needs Assessment estimate that in this District there is a predicted net shortage of 954 affordable homes per annum for the next five years • The District has the highest house price to income ratio in the County. • Total supply of affordable dwellings achieved in the period 1996 – 2008 was 1190 units. • Although the authority has met its Corporate Strategy target of providing 250 additional affordable homes between 2005 – 2008, the provision of additional affordable homes remains a corporate priority. • 4255 dwellings were built between 2001 and 2008. At 31-3-2008 371 dwellings were being built and 782 had the benefit of planning approval but not yet started (excluding sites unlikely to be built within five years). A further 259 dwellings may come forward within five	• Increasing demand for affordable housing. • House prices have started to fall after a long period in which they increased significantly. • Improved investment in the provision of affordable housing (Between 2003 – 2008 about 9.2M Government Grant funding and 7.4M direct Council funding). • Stratford District is now the best in the sub region in the provision of affordable housing. • Spending on bed and breakfast for temporary accommodation continues to be reduced significantly. • Affordable housing has been identified as a key challenge in the Community Plan.	• Housing Strategy (2006/11) • Housing Strategy Statistical Appendix 2008 • Community Plan • Empty Homes Agency • Homelessness Strategy • Census Data • Joint Housing Market Assessment for South Warwickshire (Aug 2006) • Corporate Strategy 2005 – 2008

Issue/Challenge:	Current State:	Trends:	Source of Information:
	years on sites identified in the SHLAA. • 4.9% of Stratford's housing stock is unfit and more that £14m in means tested grants will be needed to make these properties fit. • In 2005/2006 153 households in the District were accepted as homeless and in need of permanent housing. The equivalent figure for 2004/05 is 103 households and in 2003/04 the equivalent figure is 161 households. • There were approximately 2,900 households on the housing waiting list at 1-4-2008. • Agencies monitor the number of people who sleep rough. On average 10 people sleep rough on any one night. • As at 1 April 2008 there were approximately 1,575 vacant dwellings in the District. Of these 900 had been vacant for more than 6 months. • The 2001 Census counted 47,202 households in the district with average household size of 2.33. • In 2001, 12816 (27%) people lived in one-person households. • In 2001 there were 3053 lone parent households (6.4%) 6o% of which has dependent children. • 76% of households are living in owner occupied accommodation whilst 12.6% live in housing association properties. 7.8% rent privately and 3.6% are in other accommodation, including living with friends.		

Issue/Challenge:	Current State:	Trends:	Source of Information:
Biodiversity & Geological Conservation	• Biodiversity and geological conservation are high on government agenda with the publication of PPS9. • SDC has been making an annual financial contribution towards local biodiversity survey work and Local Site designation (Habitat Biodiversity Audit & Wildlife Sites Project: £6000 per annum). • There are 37 SSSIs in the District. About 84% are in favourable condition. • 27 Local Wildlife Sites (a.k.a. SINCs) have been designated in the district but there are hundreds of potential Local Sites which have yet to be fully assessed. • There are four Local Nature Reserves in the District. • There are 16 sites within or partly within the district managed as nature reserves by Warwickshire Wildlife Trust. • There are 27 Regionally Important Geological and Geomorphological Sites (RIGs) within the district. • The Warwickshire, Coventry & Solihull Local Biodiversity Action Plan (LBAP) contains action plans for a range of habitats and species which occur within the district. • The Warwickshire Geological Conservation Group is currently preparing a draft Local Geodiversity Action Plan (LGAP).	<u>Negative</u>: • Loss in the extent of some habitats, e.g. lowland neutral grassland, allotments, ponds, lakes and reservoirs, quarries and gravel pits. • Decline in the quality of some habitats through a lack of appropriate management, e.g. woodland. • Fragmentation and isolation of habitat through loss of links such as hedgerows. • Veteran trees being left isolated and vulnerable though unsympathetic land management. • Pressure on some types of habitat, e.g. infill development on mature gardens. • Decline in various species including farmland birds, invertebrates and plants that used to be typical of arable land. • In the longer term, climate change is likely to give rise to change in the extent and condition of habitats and change in the extent and distribution of species. <u>Positive</u>: • Increase in the extent of	• UK Biodiversity Action Plan. • Local Plan Review • Natural England • Community Plan • Putting Wildlife at the Heart of England (DEFRA 2003) • Warwickshire Museum Field Services • Warwickshire Habitat Biodiversity Audit • Warwickshire, Coventry and Solihull Local Biodiversity Action Plan • Warwickshire, Coventry and Solihull Parish BAP • LBAP Progress Report 2001-7 • The State of Warwickshire's Biodiversity – Local Area Agreement 2007-2008 (WCC 2008) • Landscapes for Living Prospectus (West Midlands Biodiversity Partnership 2008) • Enhancing Biodiversity Across the West Midlands (West Midlands Biodiversity Partnership/ Natural England) • British Breeding Bird Survey 2007 (BTO/JNCC/RSPB) • Plant Diversity Challenge (JNCC/Plantlife/Royal

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		some habitats, e.g. woodland and field margins. • At the national level there are signs that some species previously very limited in their distribution are on the increase. For example, national otter survey has found that the area that otters live in has increased by 527% in the last 25 years. • The population index for woodland species in the West Midlands has increased by 59% since 1970. 15 species have increased in number and 6 have declined. • High take-up of new agri-environment schemes which is having a beneficial effect on habitats such as field margins and hedgerows. The Warwickshire Geological Conservation Group is commencing a project to monitor the condition of RIGS sites.	Botanical Gardens, 2007 • Biodiversity and Adaptation to Climate Change – advice note (West Midlands Biodiversity Partnership, 2008) • Warwickshire Geological Conservation Group
Meeting Business and Employment Needs	• Between 1996 – 2007 a total of 81.9 hectares of land was developed for employment (B1, B2 and B8). • During this period 8.3 hectares of employment land has been lost to other uses. A further 10.3 hectares has	• Take up of employment land has been about 9 hectares/annum over the past six years. • Sites are under pressure for redevelopment for other	• Stratford-on-Avon District Annual Monitoring Report (2007) • Community Plan • Stratford-on-Avon District Economic Regeneration

Issue / Challenge:	Current State:	Trends:	Source of Information:
	planning approval to be developed for alternative uses. • Overall employment land supply for the period 1996 - 2011 is currently 134.3 hectares compared to 81 hectares of industrial land requirement set by the Structure Plan for this period. • Traditional employment areas are becoming outworn. • New business formation rate is quite low but survival rate is above average. Business closures are lower than national, regional and sub-regional situation. • There are about 42,000 full time equivalent jobs in the District. • Employment rate in the District stood at 80.7% in 2004, well above that for region (73.4%) and national average (74.4%). • Unemployment rate in the District is about 1.0% (June 2008) compared with 3.0% in the West Midlands region and 2.2% in the UK. • compared with the county and national situation, Stratford District has a higher proportion of jobs in the agriculture, hotels & restaurants and finance & business services sectors. It has a lower proportion of jobs in manufacturing, transport and public services. The situation is similar in all other sectors. • Concern about employment in the District often relates to need for affordable housing and childcare, skills and training, lack of suitable staff to fill available vacancies.	uses. • Few new companies are relocating in the District. • Number of jobs in farming continues to decline. • Manufacturing and skilled workers also continues to decline. • Signs that further education sector is responding to needs of employers. • Level of commuting continues to increase (in-commuting from 20% to 36%, out-commuting from 32% to 40% between 1981 and 2001).	Performance Report • Stratford-on-Avon Healthcheck 2003 • BMG Research Report: Understanding Employers Needs in Coventry and Warwickshire 2004 • West Midlands Towns Intervention Study • SDC Employment Land Database • WCC Economic Development Service • Annual Business Surveys (ONS), • National Farmers Union • South Warwickshire Tourism • Coventry and Warwickshire Survey of Employer • WCC Education Service. • Census of Population (ONS) • The State of the District – An economic, social and environmental audit of Stratford-on-Avon (Sep. 2006)

Issue/Challenge:	Current State:	Trends:	Source of Information:
	• Accessing training and employment is difficult for many due to poor public transport in rural areas. • District experiences relatively low salary but has high house prices. Comparing lower quartile house prices with lower quartile earnings gives a ration in the District of 9.0, well above the England average of 7.3. • Average household income is about £29,600 against a national average of £26,200. • 82% of businesses have less than 200 employees. • 23.9% (19,522) of those aged 16-74 held a degree level or higher education qualification compared to the County figure of 20.7%. Those without qualifications were 24.1% which is lower than the County figure of 27.8% (2001 Census Data). In 2003, 64.2% of young people at key stage 4 obtained five or more grade A – C GCSEs which is significantly higher that the County average of 54%. • Average sized economy ranked as the 182nd largest of 408 districts in Great Britain. • Its productivity score is ranked 104th out of 408 districts in Great Britain. • District is ranked 301st of 408 districts in Great Britain for economic growth.		
Role of Stratford-upon-Avon	• Good quality retail offer for size of town. Existing retail provision is above average for a town Stratford's size.	• Increasing competition from other centres and other forms of retailing.	• Bert Nicholson & Associates Health Check (2003) • Urban Practitioners UDF

Issue/Challenge:	Current State:	Trends:	Source of Information:
	• Wide range of commercial and leisure activities. • High rents mean that independent traders and 'local' businesses are squeezed out of prime location. • About 4% of total units in town centre are convenience goods outlet compared with Great Britain average of close to 9.5%. • There is a total of 10 high profile retailers represented in the town centre, which is the third highest in the region, after Birmingham and Solihull. In addition, 14 large store multiples are present in the town centre. • Retail units within the primary shopping area of the town centre can command a high and increasing rental value. Zone A shopping rents have increased from £120 to £130 per sq.ft/annum between 2001 and 2007. • Vacancy level is very low, with approx. 4.8% of units vacant compared with Great Britain average of 10.5%. • Town centre is an attractive place to visit with high quality environment, a wide range of attractions and a good quality retail offer. • Acknowledged to be a healthy centre and its problems are, in many ways, products of its success. • Physical capacity of the town centre to accommodate commercial development is limited due to substantial constraints which are very difficult to overcome.	• Increasing pressure of the environment due to volume of visitors and traffic. • Increasing consumer spending and growth in leisure shopping. • Experience in recent years has been one of consolidation rather than expansion or diversification. • GOAD retail ranking which gives relative positions of the top 500 retail centres in UK, shows that Stratford fell from 79 to 191 in the period 1998-2002. • Promis ranks Stratford 77th of all the centres it analyses in terms of retailer demand • There has been no significant increase in floorspace in the town centre in recent years. • The Focus database indicates a healthy level of interest in Stratford-upon-Avon, with a total of 68 requirements listed in 2006.	Issues and Opportunities Report (2006) • Regional Centres Study, Roger Tym & Partners (2007) • Experian Goad • Colliers CRE

Issue / Challenge:	Current State:	Trends:	Source of Information:
Role of Main Rural Centres	• Scale and range of commercial activity varies between centres. • Certain centres are in need of significant environmental improvement. • Benefit from free parking, attractive local traders and general pleasant environment. • Common issues facing centres include how to improve public transport and manage traffic effectively. • Since 1996 the following significant retail schemes have been implemented – Budgen in Bidford-on-Avon (0.4 ha. /980 sq.m), Co-op in Wellesbourne (0.4ha/810sq.m plus extension comprising 330sq.m), Co-op in Studley (replacement of existing stores with no additional floorspace involved). • Rural centres retain only a modest proportion of available spend on convenience goods, eg. 27% in Alcester, 40% in Shipston, 26% in Southam.	• Increasing competition from larger centres. • Degree of stagnation due to limited investment and lack of new businesses locating in the centres. • Relationship with local catchments is weakening.	• Various Market Town Health Checks and Parish/Town Plans. • Retail Study, Colliers CRE (2008)

Issue/Challenge:	Current State:	Trends:	Source of Information:
Leisure and recreation	• Stratford and all the main rural centres in the district except Henley-in-Arden have a deficit of children's play areas. Two thirds of Centres have a deficit of adult sport and recreation space. • Not all existing open spaces are maintained to acceptable standards. • Even where provision standards are met, certain types of open space are lacking in certain areas of the settlements.	• Existing open space with leisure or amenity value is protected from development, therefore levels should not be decreasing. • There are opportunities to improve provision through on-site and off-site required contributions from new development, although this will be in proportion to increased population.	Open Space Audit of Stratford and the Main Rural Centres (SDC, 2005)
Leisure and recreation	• Protecting and improving village facilities is a frequent and prioritised theme in Parish Plans. Village halls are highly valued, with several parishes seeking to retain or improve their village hall (4, 2*) and 2 lacking an adequate meeting place. • Communities are concerned that it is difficult for those without a car to access facilities and leisure activities, especially young people in the evenings. • Some villages are lacking a space for children's play, sports, or village events. One larger settlement has some but would like more	• Communities are active in improving available facilities through Parish Plans and Grants. • Many are seeking to provide more activities for young people and improve evening bus services. Several are seeking to improve existing sports fields and play areas. • Many communities are working with the WCC on improvement of right of way through the Parish Pathways Partnership (P3)	Main themes in Parish Plans from the Parish and Town Plans adopted by Stratford-on-Avon District Council up to Dec 2007
Leisure and recreation	• In 2003 almost a quarter of residents had visited or participated in local leisure pursuits at least once a week. However, a further quarter had not visited/participated in local leisure pursuits in the last twelve months.		Citizen's Panel on leisure facilities (SDC, Dec 2003)

Issue/Challenge:	Current State:	Trends:	Source of Information:
Leisure and recreation	• Leisure and culture was seen as a less important issue facing the District compared to other social issues such as housing, transport and local services. 27.9% felt it was important.		Issues and Options consultation survey sent to random sample of residents (SDC May 2007)
Leisure and recreation	• 71% of people in Stratford-upon-Avon rate physical activity as important. 65.8% take moderate physical activity at least 3 times a week (2005).		2005 Quality of Life Survey Warwickshire County Council.
Leisure and recreation	• In a survey carried out by WCC in December 2003, 65% of citizens said that access to footpath networks has a big impact on their personal health and well-being. • In 2002-4, 68.6% of the rights-of-way network in Stratford District was easy to use for the public.	• The proportion of footpaths in the county which are "easy to use" is gradually increasing. • The WCC Countryside Access Team hope to improve working relationship on large scale planning applications where there are right of way, in order to protect and improve the quality of rights of way possibly through planning gain. • There is an identified opportunity to "develop a flagship trail between Warwick and Stratford upon Avon along the River Avon for walkers and cyclists" (p.56) • Actions have also been identified to relaunch existing section of the Avon Valley Way from Stratford to	Countryside Access and Right of Way Improvement Plan for Warwickshire 2006-16 (WCC Countryside Access Team) available at www.warwickshire.gov.uk/rowip

Issue/Challenge:	Current State:	Trends:	Source of Information:
		Marlcliff, and develop an information point, with toilets and car parking, in the Stratford District.	
Historic Environment, Landscape and Quality of New Development	• The Cotswolds Area of Outstanding Natural Beauty (AONB) covers part of District. • The Local Plan shows several Special Landscape Areas and Areas of Restraint in the district. • The Warwickshire Landscape Guidelines define a range of landscape character types within the district. These were subject to slight amendments by SDC's Countryside Design Summary. • There are 75 designated Conservation Areas in the district. • There are 11 parks and gardens of Special Historic Interest in the District. • There are 83 Scheduled Ancient Monuments in this district. • The site of the Battle of Edgehill is included in the Register of Historic Battlefields. • There are over 3000 listed buildings in the District of which 359 are located in Stratford-upon-Avon. • Three of the Grade I and Grade II* buildings have been included in English Heritage's "Heritage at Risk" Register (just over 1% of the total number). • It is estimated that the number of listed buildings at risk increased by 1.6% in the West Midlands, the highest for any region (2005 figures). • In the region, 21% of scheduled ancient	• Climate change is an increasing threat to landscape. • Changes to agricultural practices continue to be a significant threat to landscape. • Local landscape designations are now discouraged in Government guidance. • Local concerns about the decline in the quality of our landscape are often related to the impact of recent development. • Recent CABE ongoing housing audit found that nine out of ten new developments failed to measure up on design standards (nationally). • The deteriorating condition of many scheduled ancient monuments is a cause for concern. • The lack of statutory protection for many archaeological sites of national interest is also a cause for concern.	• Local Plan Review • List of Buildings of Special Architectural or Historic Interest, District of Stratford-on-Avon (DCMS) • Register of Parks and Gardens of Special Historic Interest in England (English Heritage) • The Register of Historic Battlefields (English Heritage) • The Schedule of Monuments (DCMS) • Historic Environment Record for Warwickshire – Warks Museum • State of the Historic Environment – West Midlands • Heritage at Risk Register 2008 (English Heritage) • Heritage Counts Report 2006 • Warwickshire Landscape Guidelines (WCC) • Warwickshire Historic Landscape Characterisation (to be fully published by WCC & English Heritage in 2009) • Countryside Design

Issue / Challenge:	Current State:	Trends:	Source of Information:
	monuments (SAMs) have general management problems, 12% are in a wholly unsatisfactory condition, 26% are in a declining condition and 9% are improving. • Of the counties of the region, Warwickshire has the highest number (34) of SAMs at risk under arable cultivation. • In the West Midlands, 25% of SAMs are at risk from agriculture. Of these, 59% are earthworks sites such as burial mounds, hillforts, moated sites and motte castles. • Only 2% of SAMs in the region are at risk from development. • As well those archaeological sites designated as SAMs, there are many others in the district that have been recorded in the Historic Environment Record that is maintained by Warwickshire Museum. Some of these sites may be of national importance and worthy of preservation. Many sites have yet to be subject to detailed investigation and there are likely to be others that remain undiscovered. • Based on Citizen Panel Results of 2002, 7.7% had contacted the Heritage and Design Section of the District Council and of this 25% were related to development affecting listed buildings and conservation areas. 70.7% of them thought that the advice given to them was clear and easily understood. 50% of respondents thought that the District Council was effective in improving the		Summary (SDC) • District Design Guide (SDC) • Countryside Quality Counts • Community Plan

Issue/Challenge:	Current State:	Trends:	Source of Information:
	build environment and protecting the historic environment.		
Managing the effects of tourism	• In 2001 there were 5.5 million visitors to the district spending £238 million. Only 0.9 million visitors stayed overnight, but these visitors spent over half of the total spending. • Tourism supports approx 5,702 direct jobs and a further 1,183 jobs from multiplier spending in the district. • Tourism supports jobs in 5 key business sectors: 26% in accommodation 17%in retailing 34% in catering 19% leisure/ attractions/ entertainment 4% transport services • In 2005, 17.1 million visitors came to Coventry and Warwickshire, of whom the majority were day visitors. They spent approximately £1.4 billion which supported in the region of 34,587 jobs.		• 2001 Tourism Economic Impact Assessment for Stratford-on-Avon District (for SDC by Visit Heart of England) • Coventry and Warwickshire; The Economic Impact of Tourism (for AWM by Heart of England, 2007 report using 2005 data)
Managing the effects of tourism	• Strengths for tourism in Stratford-upon-Avon include the Elizabethan heritage and architecture of the centre, the history and setting of the town and the current high number of 3.8 million visitors a year. • Weaknesses include poor rail links and connection between town and station, congested road system, lack of evening economy, and the loss of independent traders.	• Identified economic concerns over the low pay of many jobs in tourism versus the high cost of living, the fact that tourist numbers have been declining recently, and that visitor spend is lowered by the predominance of day over staying visitors. • Threats include the limited interests and reasons for visiting the town of visitors,	World Class Stratford Urban Design Framework (April 06, Urban Practitioners team representing WCC, AWM, Stratford Town Trust, RSC, SDC etc)

Issue/Challenge:	Current State:	Trends:	Source of Information:
		and the quality of the town centre environment. • There are opportunities to diversify the attractions offered by the town.	
Managing the effects of tourism	• The main things that visitors like are the relaxed atmosphere, the river, the parks and gardens, the buildings and architecture, the shopping, the theatre, the history and general prettiness. • Cost of parking, value for money of attractions and catering, overcrowding and threat of traffic are rated significantly lower than by visitors to comparable historic towns. • The percentage of visitors travelling by regular public transport at 15% is significantly lower than the 28% average for all historic towns. 25% felt threatened by traffic which is 3 times the average. • 69% of visitors said that nothing had spoilt their enjoyment of their visit.		Stratford on Avon Visitor and Benchmarking study (Heart of England Tourism for SDC and S Renaissance, 2005) Survey undertaken in Stratford June-Sept 05 using questions for 'historic town benchmarking' to allow comparisons to Chichester, Colchester, Oxford etc.
Tourism aspirations of rural market towns	• The Vision for Southam has already resulted in projects such as the renovation of the Holy Well and a sculpture walk.	• Southam wants to improve level and quality of information for tourists and residents about local attractions. It will supports schemes to present and promote local attractions and heritage e.g Blue Lias Rings Walks, Holy Well etc.	Vision for Southam 2020 and Southam Town Plan 2006

Issue/Challenge:	Current State:	Trends:	Source of Information:
Tourism aspirations of rural market towns		• Alcester recognises the value of tourism for the local economy and aims to fully exploit the visitor economy and be a quality destination of choice. This will be achieved by strengthening the Roman heritage, promotion as a stop-over destination for walkers and cyclists and as a festival town, and extending the visitor accommodation offer.	Vision for Alcester in 2020
Tourism aspirations of rural market towns	• Ragley Hall and Coughton Court are high profile attractions which bring visitors to Alcester	• Alcester aims to work with SDC and Better Welcome to make it a more attractive place for tourists and visitors.	Alcester Town Plan 2007
Tourism aspirations of rural market towns	• The Stour Area recognises the value of tourism for the local economy.	• The Stour Area want to promote itself as a base from which more visitors will chose to explore the Cotswolds and Shakespeare country. Rather than develop attractions the emphasis of the actions is to improve the already attractive natural environment including AONB and develop first class visitor accommodation. Shipston-on-Stour seeks to promote itself as a shopping destination of choice.	Vision for Stour in 2020