

Stratford-on-Avon District Annual Monitoring Report 2005



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1 Introduction

The preparation and publication of an Annual Monitoring Report is one of the fundamental planks of the new planning system introduced by the Planning and Compulsory Purchase Act 2004.

To quote Government guidance, 'monitoring is essential to establish what is happening now, what may happen in the future and ... to determine what needs to be done.'

The Act requires each local planning authority to submit an annual report to the Secretary of State. It is expected to contain information on the implementation of the Local Development Scheme and the extent to which the policies set out in the local development documents are being achieved.

One of the key components of the new planning system is the importance of linking the development plan with the community strategy for the area. In this way it is possible for them to adopt common targets and indicators so that common progress can be gauged.

The development plan can be helpfully described as the physical manifestation of the community strategy, helping to ensure that land and buildings are used in ways that meet the expressed needs and priorities of communities.

The new form of monitoring is intended to take a positive approach, identifying key challenges and opportunities, and informing decisions so that the greatest benefit for the future of the area is derived.

This document is Stratford District Council's first Annual Monitoring Report (AMR) produced under the 2004 Act. It seeks to meet the Government's expectations of the initial edition of the AMR and identifies where improvements in the scope of the monitoring process are intended to be made.

This report covers the monitoring period 1 April 2004 to 31 March 2005, apart from the section on the Local Development Scheme which outlines progress at the time of publication.

2 Summary

This section draws out some of the key findings that have been established through producing this edition of the Annual Monitoring Report.

- progressing the Stratford-on-Avon District Local Plan Review to adoption has slipped slightly. It is hoped to adopt the Plan by Spring 2006, although this will be dependent on whether a Modifications Inquiry is held.
- because of the delay in adopting the Local Plan Review, work on the Core Strategy Development Plan Document has also slipped. Initial stages of evidence gathering and the formulation of options will now commence early in 2006.
- the Community Plan for Stratford-on-Avon District and the Corporate Strategy of the District Council provide a clear vision for the future and specific priorities for action. They will also provide an important foundation for work on the new Local Development Framework.
- the level of industrial land in Stratford District for the period 1996-2011 (127 hectares) exceeds significantly the requirement of the Warwickshire Structure Plan (81 hectares). However, this is due almost entirely to the large-scale developments that have been approved at the Gaydon Proving Ground.
- a large proportion (79%) of industrial development since 1996 has taken place on brownfield land. This compares favourably with the Structure Plan target of 60%.

¹ *Local Development Framework Monitoring: A Good Practice Guide, 2005*

- the anticipated completions rates from the identified housing land supply and from estimated windfall development would slightly exceed (by 289 dwellings) the Regional Spatial Strategy ceiling targets for the period to 2011. However, in the 2011-2016 period, even allowing for the release of the Strategic Reserve Sites in the Local Plan Review Proposed Modifications, the figures suggest a potential shortfall in completions against the strategic target as currently defined.
- the bias towards housing development on greenfield sites in 2004/05 (ie. 60%) is an outcome of decisions made in the context of planning policies prevailing in the 1990s when the adopted Stratford-on-Avon District Local Plan was being prepared. The majority of greenfield completions come from two sites allocated in that Local Plan, ie. Bridgetown and Bishopton. It is anticipated that the bias will switch to brownfield sites after these two sites are completed within the next two years.
- it is acknowledged that the current ability to monitor a number of core indicators is limited. This situation will partly be overcome through improvements to the planning applications database. However, certain indicators will require additional resources and/or assistance from specialist sources in order to be monitored effectively, for example the issue of biodiversity.
- the strategic emphasis in the Structure Plan on locating most development in Stratford-upon-Avon has not been achieved, taking 1996 as the base (ie. 16% for employment and 30% for housing). This is mainly due to the scale of commitments elsewhere in the District that pre-date the operation of policies in the Local Plan Review. The figure is particularly low for employment because it is acknowledged that employment opportunities should be provided across the District.
- a comprehensive assessment of all the policies in the Local Plan Review has not been undertaken at this stage. Such an exercise will be carried out in producing the Local Development Framework. It is anticipated that most policies will remain relevant and appropriate for inclusion in the LDF in order to ensure a comprehensive coverage of issues raised by the 3500 or so applications submitted to the District Council each year.

3. Local Development Scheme – progress and review

This section provides an update on the state of progress for the various documents referred to in the Council's Local Development Scheme published in March 2005.

For each document, the latest position is given and an explanation provided where changes are proposed to the Local Development Scheme.

Name of Document	Progress	Proposed Change to the Local Development Scheme
Stratford-on-Avon District Local Plan Review	Proposed Modifications placed on deposit in October 2005. Adoption anticipated by April 2006, but this will not be possible if a Modifications Inquiry is held.	Amend adoption date to April 2006 (this will need to be revised if a Modifications Inquiry is necessary).
Statement of Community Involvement	Submitted to Secretary of State in June 2005. Representations submitted. Examination to be held in January 2006.	The requirement for a public examination means that the adoption date should be amended to April 2006.
Core Strategy DPD	Pre-production evidence gathering stage now due to commence in January 2006.	Delay due to slippage in progressing Local Plan Review to adoption. Dates for other key milestones to be amended accordingly.

Name of Document	Progress	Proposed Change to the Local Development Scheme
Significant Allocations DPD	Pre-production evidence gathering stage now due to commence in January 2006 (in parallel with Core Strategy).	Delay due to slippage in progressing Local Plan Review to adoption. Dates for other key milestones to be amended accordingly.
Developer contributions towards transport schemes in Stratford-upon-Avon	Timetable is linked to the adoption of the Local Plan Review and re-adoption as SPD likely to slip to the end of 2006.	Amend date of adoption to December 2006.
Car and cycle parking standards	Timetable is linked to the adoption of the Local Plan Review and re-adoption as SPD likely to slip to the end of 2006.	Amend date of adoption to December 2006.
Meeting the needs of the District's rural communities	Timetable is linked to the adoption of the Local Plan Review and re-adoption as SPD likely to slip to the end of 2006.	Amend date of adoption to December 2006.
Stratford-upon-Avon Waterfront Masterplan	Timetable is linked to the adoption of the Local Plan Review and re-adoption as SPD likely to slip to the end of 2006.	Amend date of adoption to December 2006.
Meeting housing needs	Informal SPD due to be approved by Spring 2006. Timetable is linked to the adoption of the Local Plan Review and re-adoption as formal SPD likely to slip to Spring 2007.	Amend date of adoption to April 2007.
Stratford-upon-Avon – development in residential areas SPG adopted in	August 2005. Timetable is linked to the adoption of the Local Plan Review and re-adoption as formal SPD likely to slip to Spring 2007.	Amend date of adoption to April 2007.
Provision of Public Open Space	SPG adopted in March 2005. Timetable is linked to the adoption of the Local Plan Review and re-adoption as formal SPD likely to slip to Spring 2007.	Amend date of adoption to April 2007.
Planning for Farm Diversification	Guidance Note approved and published in August 2005.	No longer intended to be adopted as SPD. Delete from Local Development Scheme.
Harbury Cement Works Masterplan	New document not currently included in the Local Development Scheme. A Masterplan is being prepared in accordance with the new Policy CTY20 for this site, which is included in the Proposed Modifications to the Local Plan Review.	Include as a Proposed Supplementary Planning Document for adoption by April 2007.
World Class Stratford –Urban Design Framework	New document not currently included in the Local Development Scheme. An Urban Design Framework (UDF) is being prepared as part of the World Class Stratford initiative. It is intended that the UDF will be adopted as SPD.	Include as a Proposed Supplementary Planning Document for adoption by December 2006.

Note: DPD = Development Plan Document SPD = Supplementary Planning Document

4. State of the District - context

Stratford-on-Avon District has about 250 communities of varying sizes spread across a predominately rural area covering 979 square kilometres. It is one of the largest districts in England making delivery of and access to services a major issue for residents.

The District contains a wealth of historic towns, villages and individual buildings, set in an attractive landscape. There are 76 conservation areas and over 3,000 listed buildings. The Cotswolds Area of Outstanding Beauty extends into the southern fringe of the District.

Around 5.5 million people visit the District each year, with Stratford-upon-Avon and the Shakespeare properties being of international significance. Tourism is crucial to the local economy and is facing important challenges at the present time.

A significant factor is the higher average age of the District's populations compared with the national average. Almost 50% of its residents are over 45 and the proportion aged 85+ has increased by nearly half over the last ten years. This trend is likely to continue.

Property prices are extremely high and many people, especially the young and lower paid, cannot afford to live within or move into the District. This makes the provision of affordable housing a priority.

Rural services, such as shops, post offices and pubs, continue to decline. This is having a detrimental effect on the function of communities as they take on an increasingly dormitory nature.

The unemployment rate in the District fell below 1.0% in March 2005, compared with 1.7% in Warwickshire as a whole and 2.5% across the UK. The tourism, retail and service sectors are important sources of jobs, but farming has declined rapidly in recent decades. The level of out-commuting is relatively high, with 39% of its employed residents working outside the District.

The level of car ownership is the highest in Warwickshire and the effects of traffic congestion on Stratford-upon-Avon require particular attention. Having said that, over 6,400 households in the District do not have a car and are therefore reliant on other forms of transport.

Nearly 6,000 households are in receipt of means-tested benefits. These households are widely spread across the District making the provision of services to meet their needs a clear challenge.

The District is a very safe place to live, with the levels of recorded crime amongst the lowest in the country. However, the fear of crime has a significant impact on the quality of life for many people.

The latest 'Quality of Life in Warwickshire' report produced by the County Council concludes:

'Stratford-on-Avon District continues to display excellent performance in many areas, particularly the local economy, health and education. The main area for concern remains transport and transport-related indicators, with almost all of these below the County average and showing decline. Despite this, the District continues to be a very good place to live and work.'

The situation outlined above has been at the forefront of the work of the District Council and its partners. In consultation with local people and organisations, the Community Plan for Stratford District was adopted in October 2004 to provide a vision for the area for the period to 2015.

The Council's own Corporate Strategy has been prepared and adopted to help achieve the Community Plan. It identifies three core aims that will act as a focus for the Council's activities and resources. These are:

- Developing Safer and Healthier Communities
- Creating Sustainable Communities
- Developing Inclusive Communities.

Together, the Community Plan and Corporate Strategy identify the following priorities for the coming years that will have specific implications for spatial planning within the District:

- Ensuring that local people have an effective voice in the decision-making processes that affect their lives, with particular emphasis on helping people in areas of relative deprivation.
- Focusing on meeting the specific needs of people who are disadvantaged through disability, lack of access to transport or limited resources, particularly with respect to the provision of affordable housing and the delivery of services.

- Maximising the use of existing facilities such as schools, libraries, village halls and other community buildings to provide local services, and to support the development of new facilities where they are needed.
- Supporting a wide range of jobs, together with the provision of affordable childcare, support for carers, skills and training, and transport so that people have the opportunity to work.
- Providing scope to participate in a wide range of leisure activities, including active recreational pursuits, to help improve the health of residents.

It is expected that these priorities will have a major bearing on the preparation and content of the Council's Local Development Framework. In particular, the Core Strategy DPD is likely to focus on providing a wide range of homes and jobs to meet the needs of local people, protecting and enhancing the landscape, habitats and built heritage, and improving the availability of and access to services.

5. Core Indicators

National and Regional Indicators

A series of national indicators has been set by Government as part of the new planning system. These have been adopted by the West Midlands Regional Assembly to assist the monitoring of the region's spatial plans. In this way it is intended to check that the objectives of the Regional Spatial Strategy are being met by each constituent part of the region.

Where possible, this edition of the Annual Monitoring Report, being the first of its type, provides data for previous years so that trends can be identified.

It should be noted, however, that the District Council is able only to provide information on certain indicators at this time. We hope to be in a position to improve our monitoring of certain matters in future years, as identified.

This part of the AMR relates to the Stratford-on-Avon District Local Plan Review. The plan has reached an advanced stage in its preparation, with Proposed Modifications having been placed on deposit at the end of October 2005 following consideration of the Inspector's Report. The plan is in general conformity with the Warwickshire Structure Plan, whereas this is not the case with the District Local Plan adopted in May 2000, particularly with respect to the substantive issues of housing and industrial land provision.

Business

It should be noted that this section relates solely to land in industrial uses, defined as Use Classes B1, B2 and B8 in accordance with the Warwickshire Structure Plan. The base date for the monitoring of industrial land provision is 1996 in order to relate to the current Structure Plan period.

1a Amount of land developed for employment

	1996-00	2000-01	2001-02	2002-03	2003-04	2004-05	Total
Hectares	27.3	1.2	8.5	3.6	26.9	3.3	70.8

Comment

This indicates the rate of completion of sites for industrial development. The higher figure for certain years is usually due to the completion of a single large scheme. For example, in the year 2003-04 a major new factory for Aston Martin was completed at the Gaydon Proving Ground.

The national indicator has recently been amended and now stipulates the amount of floorspace developed for employment by type. This information is not readily available for previous years but the amount of employment floorspace completed during the year 2004/05 is as follows:

	B1(a)	B1(b)	B1(c)	B2	B8	Total
Floorspace(sq.m)	2,000	0	4,250	1,750	900	8,900

1b Amount of land developed for employment in a development and/or regeneration area

None of Stratford-on-Avon District lies within such an area.

1c Percentage of 1a (above) which is on previously developed land

	Total land developed (ha)	Total brownfield land (ha)	Percentage
1996-2005	70.8	55.9	79.0

Comment

The Warwickshire Structure Plan (Policy I.2) sets an indicative target of 60% for new industrial development on previously developed land in Stratford-on-Avon District. Hence, it is evident that the target has been exceeded significantly since 1996.

1d Employment land supply

	Under construction (ha)	With planning permission (ha)	Otherwise committed (ha)	Total (ha)
As at 31.3.05	3.2	42.0	11.9	57.1

Comment

The existing level of industrial land supply, when added to the 70.8 hectares completed since the base date of 1996 (see 1a above), reveals that 127.9 hectares of land has been available for industrial development during the plan period 1996-2011. This compares with the industrial land requirement for Stratford-on-Avon District of 81 hectares specified in the Warwickshire Structure Plan (Policy I.2). The excess provision is due almost entirely to the substantial amount of development that has taken place at the Gaydon Proving Ground since 1996 which equates to approximately 44 hectares. This development has been exclusively for Land Rover and Aston Martin and was justified in the national interest of the motor vehicle industry.

1e Loss of employment land (ie. amount of land redeveloped for other uses)

	1996-00	2000-01	2001-02	2002-03	2003-04	2004-05	Total
Hectares	3.7	0.0	0.0	0.0	0.0	3.9	7.6

Comment

The figures above relate to the amount of land already redeveloped. However, there are a further 8.6 hectares of industrial land with planning permission for redevelopment to other uses, mostly residential. On that basis, a total of 16.2 hectares has been lost since 1996, a situation which should be taken into account when considering the overall supply of industrial land in the District.

1f Amount of employment land lost to residential development

All of the 7.6 hectares in 1e (above) were lost to residential development.

Housing

2a Housing trajectory

Comment

The trajectory covers the period up to 2016 in accordance with the advice of para. 4.22 of Local Development Framework Monitoring: A Good Practice Guide, i.e. ten years from the anticipated date of adoption of the Stratford-on-Avon District Local Plan Review.

The scope of the housing trajectory is based on the need to monitor housing delivery against the housing provision figures set out in the West Midlands Regional Spatial Strategy which now forms part of the development plan for the District. This approach follows guidance provided by the Government Office for the West Midlands. A base year of 2001 is used, as recommended by GOWM. The provision for Stratford-on-Avon District is calculated on the basis of the housing growth proportions used in Policy H.1 of the Warwickshire Structure Plan (WASP) applied across the whole of the period 2001-2016 in the absence of any other guidance on district level apportionment of RSS growth for Warwickshire as a whole. The proportion for Stratford-on-Avon District is 26.4%.

While it has been suggested by GOWM that the trajectory also shows WASP housing provision figures, it is considered that this would not serve a purpose, given that the District Council is using RSS figures in its Proposed Modifications to the Stratford-on-Avon District Local Plan Review. Furthermore, the WASP figures are not in conformity with the RSS and in any case they provide no steer as regards the extent of provision for the period 2011-2016.

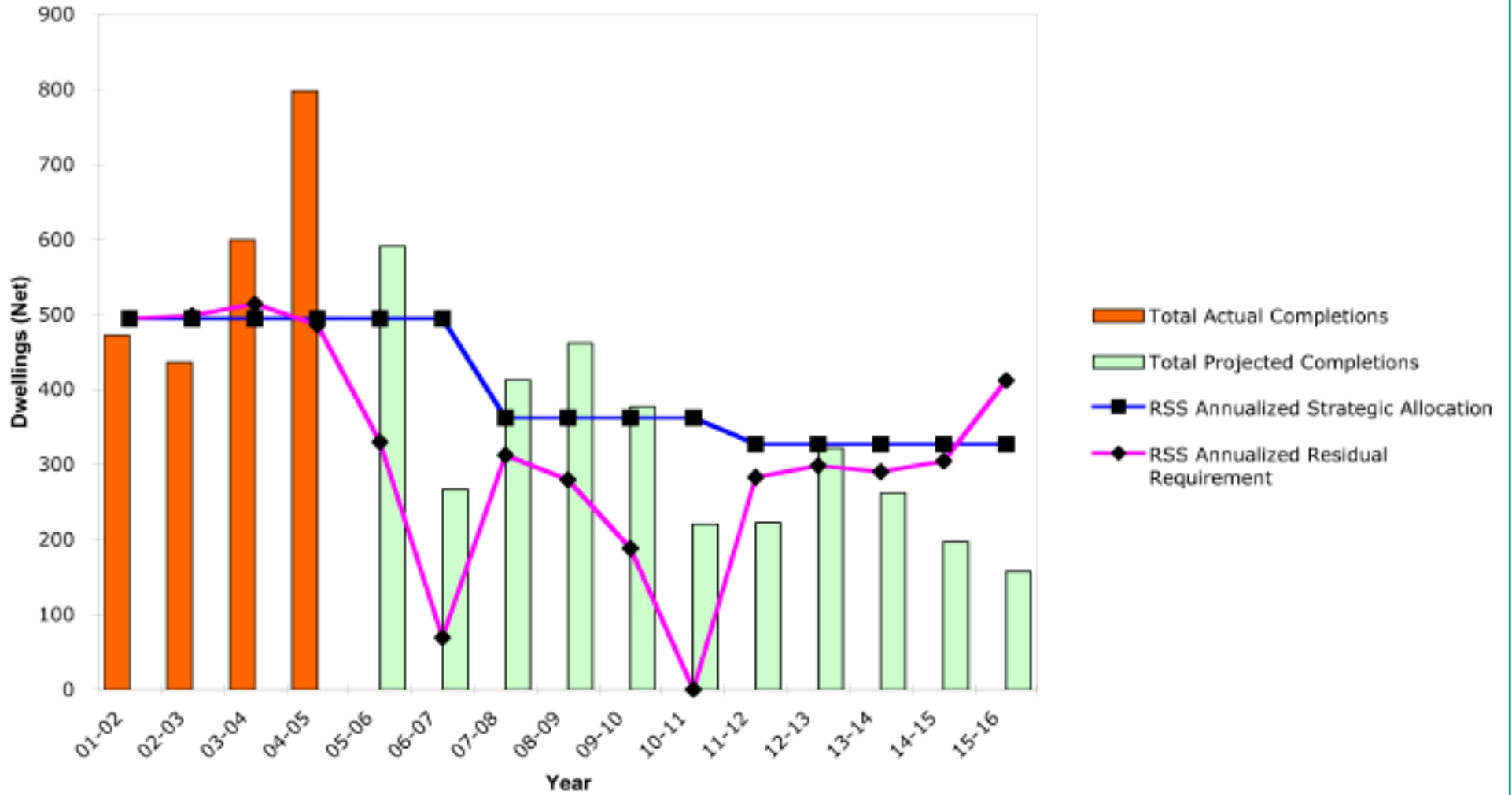
While the RSS housing provision figures are expressed in gross terms, the LDF Monitoring Good Practice Guide seeks net figures. For an interim proxy measure of progress prior to the impending review of the RSS, Fig. 1 shows RSS net allocation figures which are derived in a manner consistent with that used to derive net completion assumptions shown in the RSS Annual Monitoring Report 2004. They equate to the RSS Annual Average Target minus the RSS Annual Demolitions Assumptions figure. The net allocation figures are on the high side as the adjustment for demolitions does not cover all forms of potential dwellings losses, e.g. changes of use and conversions. Comparison can be made with the version of the trajectory based on gross figures, also provided in this report (Figs 3 & 4).

The RSS allocation is expressed in three phases of provision to be consistent with Table 1 of the RSS, i.e. 2001-2007, 2007-2011 & 2011-2016. Each phase has different annualized allocations, each lower than the previous. In general terms Fig. 1 shows that anticipated completions rates from the identified land supply and from estimated windfall development would exceed the RSS ceiling targets for the first two phases. However, in the 2011-2016 period, even allowing for the release of the Strategic Reserve Sites in the Local Plan Review Proposed Modifications, the figures suggest a potential shortfall in completions against the strategic target as currently defined. This is highlighted in Fig. 2 which clearly shows that the balance against the RSS maximum requirement falls into deficit post-2011. If the three phases are merged and considered on a cumulative basis, then the 2011-2016 shortfall would contribute to an overall shortfall of between 200 and 300 dwellings below the RSS-derived ceiling target of just over 6000 dwellings.

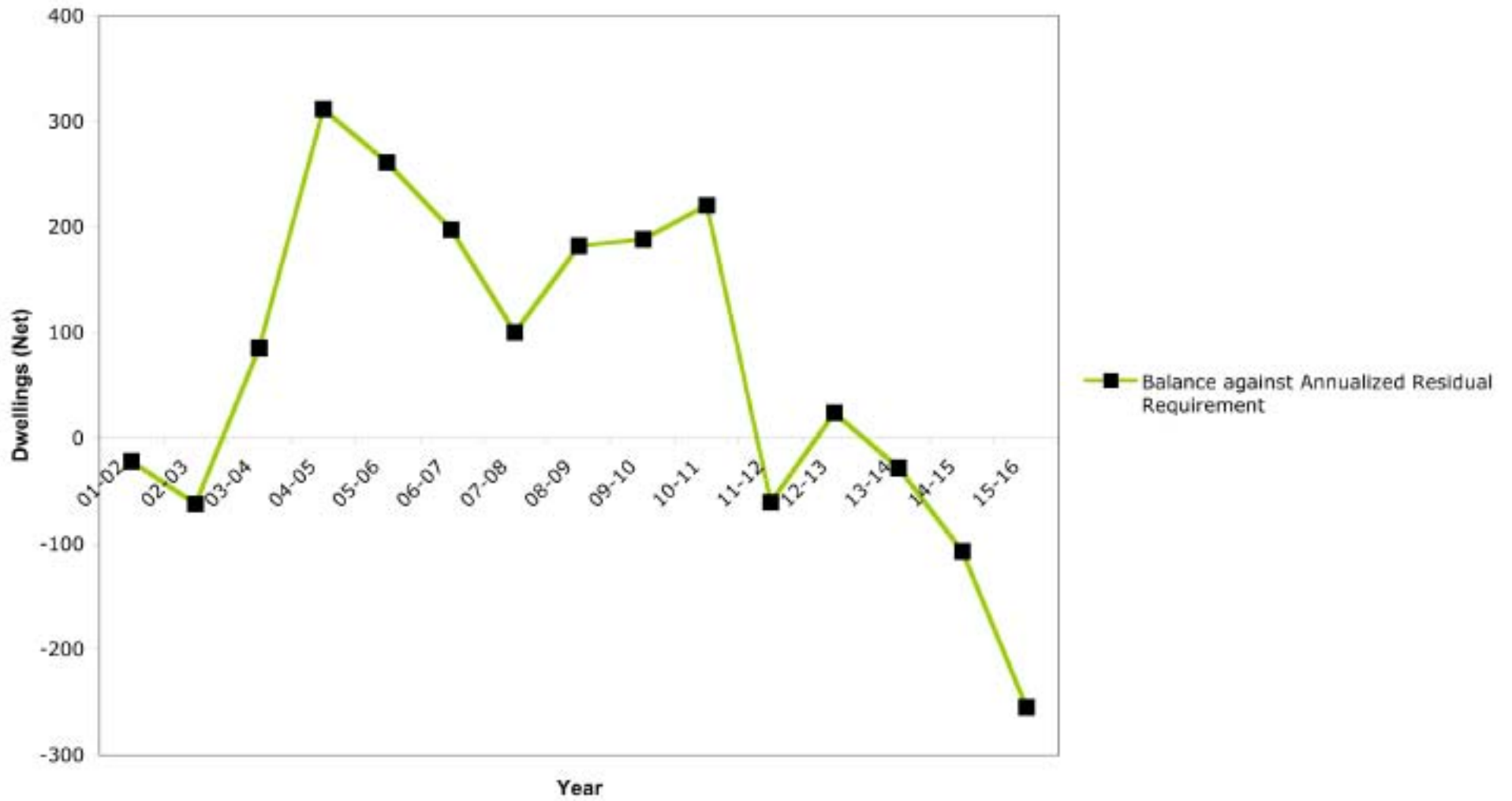
While not required in the LDF Monitoring Good Practice Guide, the gross figures version of the housing trajectory are shown in Figs 3 & 4 because the RSS strategic housing allocations are presented in the form of annualized rates of gross housing provision. This version of the trajectory represents a more accurate measure of progress towards strategic housing targets than the one based on net figures, although it does confirm the general picture given by the net trajectory, namely an adequate land supply until 2011, then a shortfall arising during the period 2011-2016.

Figs 3 & 4 are suggesting that although the first two phases (2001-2007 & 2007-2011) are likely to see housing provision above the ceiling targets derived from the RSS, taking account of under-provision in the 2011-2016 phase, if the period 2001-2016 were to be taken as a whole then the ceiling target would not be exceeded. As with the net figures, the gross trajectory suggests a shortfall of between 200 and 300 dwellings over that period.

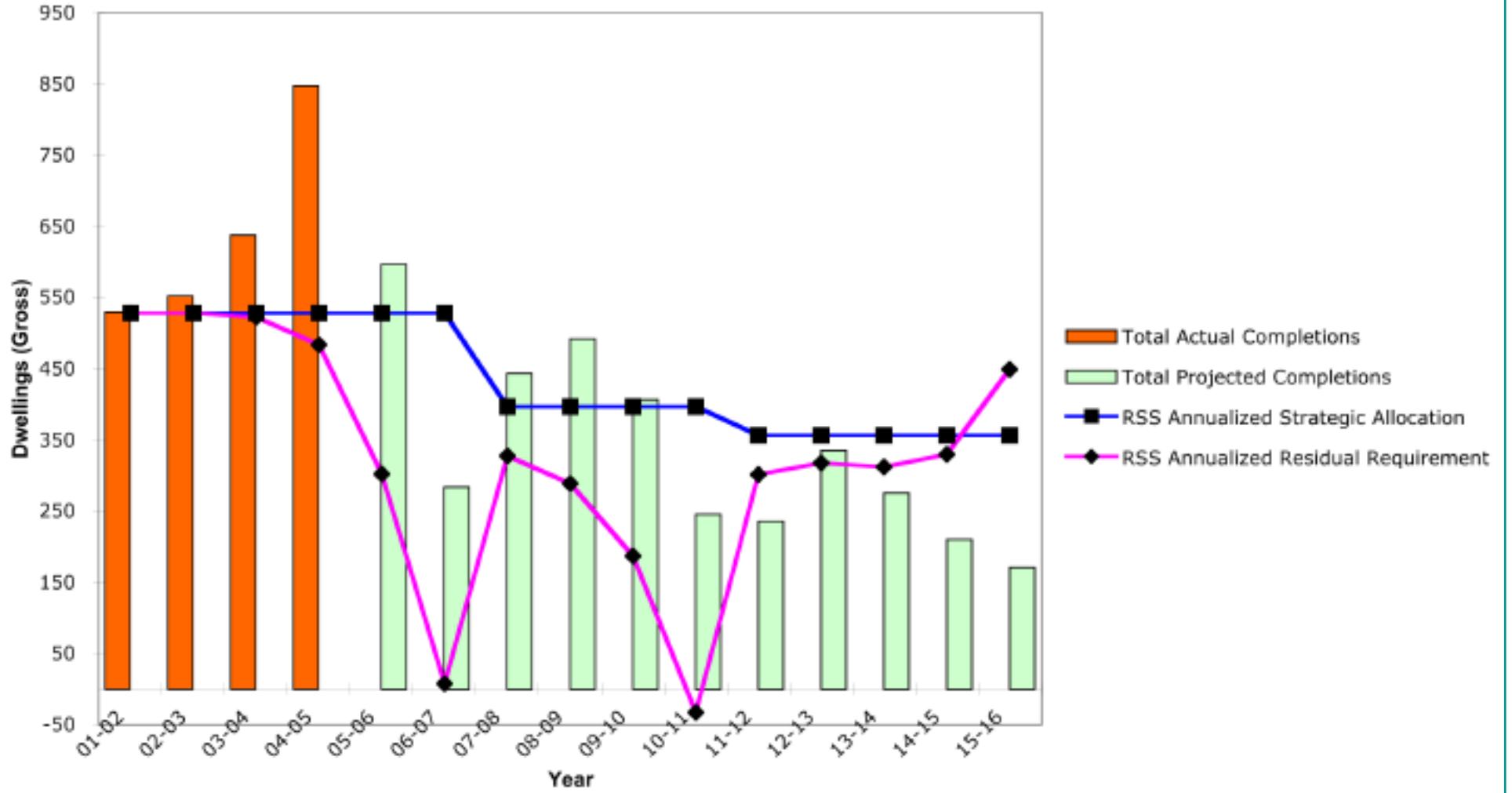
**Fig. 1 Housing Trajectory - Stratford-on-Avon District 2005
Net Figures**



**Fig. 2 Housing Trajectory - Stratford-on-Avon District 2005
Net Figures**



**Fig. 3 Housing Trajectory - Stratford-on-Avon District 2005
Gross Figures**



**Fig. 4 Housing Trajectory - Stratford-on-Avon District 2005
Gross Figures**

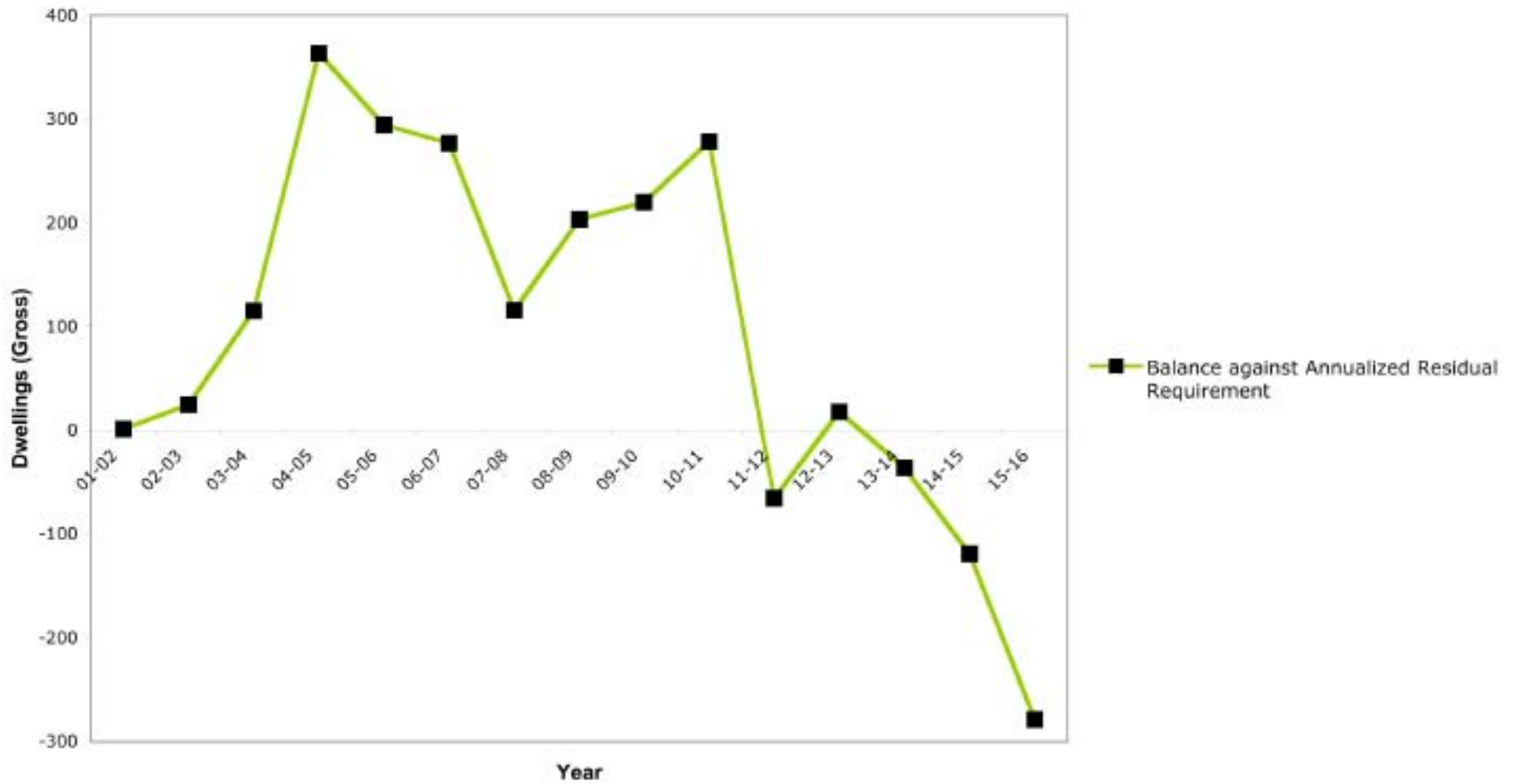


Table 1 Numbers of dwellings used to produce Figs. 1 - 4

	01-02	02-03	03-04	04-05	05-06	06-07	07-08	08-09	09-10	10-11	11-12	12-13	13-14	14-15	15-16	Total
	Net Figures															
Net Completions (actual & projected) (Fig 1)	472	436	599	797	591	267	413	462	377	220	222	322	262	197	157	5792
RSS annual net strategic allocation (Fig 1)	494	494	494	494	494	494	362	362	362	362	327	327	327	327	327	6047
RSS annual net residual requirement (Fig 1)	494	498	514	486	330	69	313	279	188	0	283	298	290	304	412	4759
Balance between completions and annualized residual requirement (Fig 2)	-22	-62	85	311	261	198	100	182	188	220	-61	24	-28	-107	-255	n/a
	Gross Figures															
Gross Completions (actual & projected) (Fig 3)	529	552	637	847	596	284	443	492	407	245	235	335	275	210	170	6255
RSS annual gross strategic allocation (Fig 3)	528	528	528	528	528	528	396	396	396	396	356	356	356	356	356	6532
RSS annual gross residual requirement (Fig 3)	528	528	522	483	302	7	327	288	187	-33	301	317	311	329	449	4846
Balance between completions and annualized residual requirement (Fig 4)	1	24	115	364	295	277	116	203	220	278	-66	18	-36	-119	-279	n/a

2b Percentage of new and converted dwellings on previously developed land

Dwellings Completed 2004/05 (Gross)		
PDL (brownfield)	340	40.1%
Greenfield	507	59.9%
Total	847	

Comment

The bias towards greenfield sites in 2004/05 is an outcome of decisions made in the context of planning policies prevailing in the 1990s when the adopted Stratford-on-Avon District Local Plan was being prepared. The majority of greenfield completions come from two sites allocated in this Local Plan, Bridgetown and Bishopton. It is anticipated that the bias will switch to brownfield sites after these two sites are completed within two years. The policies and proposals of the Stratford-on-Avon District Local Plan Review (as Proposed to be Modified) place emphasis on the release of brownfield sites ahead of greenfield land.

2c Percentage of new dwellings completed by density of development

Dwellings Completed 2004/05 (Gross)		
Less than 30 dwellings per hectare	207	24.5%
Between 30 and 50 dwellings per hectare	533	62.9%
Above 50 dwellings per hectare	107	12.6%

Comment

Because data is not held on the size of individual dwelling plots, the figures are based on the densities of the overall development sites within which the completed dwellings have been built. The figures indicate that 75% of new dwellings built in 04/05 in the District were on sites being built at densities equal to or in excess of the 30 per hectare threshold recommended by the Government in PPG3. Unsurprisingly in a largely rural district, many of the dwellings built at low density are single replacement dwellings within large curtilages in villages and the countryside where intensification would be inappropriate. In other cases permissions at lower densities pre-date the publication of PPG3 and were granted when average densities of 25 dwellings per hectare were acceptable.

2d Number of affordable dwellings completed

Dwellings Completed / Lost 2004/05	
Affordable dwellings completed	203
Affordable dwellings lost	1
Net additional affordable dwellings	202

Comment

The figure of 202 net additional affordable dwellings represents a considerable improvement in performance over that of the previous few years. A large majority of the completions comprise plots secured through S.106 agreements on the large housing development sites in Stratford-upon-Avon. While 2004/05 was a good year for affordable housing completions, they represented less than a quarter of all dwellings completed in the year. There remains a considerable need for further affordable housing in the District, a problem exacerbated by high average house prices. The District Council has recently commissioned a Local Housing Assessment in conjunction with Warwick District Council and this will provide further information on the scale of the problem.

Transport

3a Percentage of completed non-residential development complying with car parking standards

The District Council is not able to monitor this indicator comprehensively at the present time. The intention is to incorporate it into an upgrade of the planning applications database that will operate from 1 January 2006.

3b Percentage of new residential development within 30 minutes public transport time to facilities

It is understood that Warwickshire County Council is developing a database for monitoring this indicator.

Services

4a Amount of completed retail, office and leisure development

	Retail (sq. m. gross)	Office (sq. m. gross)	Leisure (sq. m. gross)
2004-05	1,765	2,525	0

Comment

Comprehensive monitoring of this indicator has commenced for the year 2004-05. It should be noted, however, that these forms of development are only monitored for schemes over a specified floorspace threshold as follows: over 1000 sq. m. gross for retail; over 500 sq. m. gross for office; and over 1000 sq. m. gross for leisure (including hotels).

4b Percentage of completed retail, office and leisure development in town centres

None of the development in 4a (above) was located within the town centre of Stratford-upon-Avon. It should be noted that this is the only town centre within the District identified in the Regional Spatial Strategy.

4c Percentage of eligible open spaces managed to green flag award standard

The only open space in the District which currently has a Green Flag Award is the River Arrow Nature Reserve in Alcester. This extends to approximately 3 hectares. It is not known how much other open space is managed to Green Flag Award standards. The total amount of open space in Stratford-upon-Avon and the Main Rural Centres, as identified in an Audit carried out in 2004, is approximately 350 hectares.

5. Minerals

This indicator is relevant to minerals planning authorities only, ie. Warwickshire County Council in the case of Stratford District.

6. Waste

This indicator is relevant to waste planning authorities only, ie. Warwickshire County Council in the case of Stratford District.

Flood Protection and Water Quality

7. Number of planning permissions granted contrary to Environment Agency advice

The District Council is not able to monitor this indicator comprehensively at the present time. The intention is to incorporate it into an upgrade of the planning applications database that will operate from 1 January 2006.

Biodiversity

8. Change in areas and populations of biodiversity importance

The District Council is not able to monitor this indicator effectively at the present time. There is little prospect of this situation changing in the foreseeable future as significant resources and expertise will be required.

Renewable Energy

9. Renewable Energy capacity installed by type

The District Council is not able to monitor this indicator comprehensively at the present time. The intention is to incorporate it into an upgrade of the planning applications database that will operate from 1 January 2006.

Local Indicators

The District Local Plan Review sets out a Monitoring Framework (see Section 9). The framework does not seek to measure the performance of every policy in the Plan, but addresses key aspects of the objectives that are at the heart of its strategy.

Not surprisingly, many of the local indicators are reflected in national and regional equivalents.

a. To satisfy housing needs

This topic is mostly covered in part 2 of the National and Regional Indicators above. In addition, the following data is provided:

Types and sizes of dwellings

Dwellings Completed 2004/05 (Gross)		
One bedroom houses/bungalows	2	0.2%
Two bedroom houses/bungalows	131	15.5%
Three bedroom houses/bungalows	276	32.6%
Four bedroom houses/bungalows	186	22.0%
Five or more bedroom houses/bungalows	67	7.9%
Houses/bungalows - total	662	78.2%
One bedroom flats	32	3.8%
Two bedroom flats	147	17.4%
Three bedroom flats	5	0.6%
Four bedroom flats	1	0.1%
Five or more bedroom flats	0	0
Flats - total	185	21.8

Comment

The range of types of dwelling being built is reasonably well balanced and shows that the District Council's policy to secure a diversity of dwelling sizes and types is having some effect. For example, the District has a relative dearth of flats and the 185 flats built in 2004/05 will help to reinforce this part of the housing stock. At the same time the District Council does not encourage the construction of one bedroom dwellings as these fail to provide sufficient flexibility as regards the changing needs of households. The 2005 Local Housing Assessment will provide further information on the local need for different types of dwellings.

b. To satisfy employment needs

This topic is covered in part 1 of the National and Regional Indicators above.

c. To secure high quality design

The number of design statements submitted with planning applications

- the District Council is not able to monitor this indicator comprehensively at the present time. The intention is to incorporate it into a comprehensive database relating to planning applications that will operate from 1 January 2006.

d. To protect landscape character

Area of green field development allowed in the AONB, Special Landscape Areas and the Green Belt

- the District Council is not able to monitor this indicator comprehensively at the present time. The intention is to incorporate it into an upgrade of the planning applications database that will operate from 1 January 2006.

e. To foster biodiversity

Area of development allowed within a Local Nature Reserve, SSSI or Ecosite

- the District Council is not able to monitor this indicator comprehensively at the present time. The intention is to incorporate it into an upgrade of the planning applications database that will operate from 1 January 2006.

f. To protect historic heritage

Number of developments resulting in the loss or destruction of a Scheduled Ancient Monument or Listed Building

- the District Council is not able to monitor this indicator comprehensively at the present time. The intention is to incorporate it into an upgrade of the planning applications database that will operate from 1 January 2006.

g. To promote alternative modes of transport to the car

The District Council is not able to monitor this indicator comprehensively at the present time. The intention is to incorporate it into an upgrade of the planning applications database that will operate from 1 January 2006. Data on certain aspects of the indicator can be provided at this time:

Number of Green Transport Plans completed

- since supplementary planning guidance was adopted by the District Council in July 1998, twelve such Green Transport Plans (or equivalent) have been completed through a legal agreement linked to a planning permission.

Value of developer contributions towards sustainable transport

Since 1996, approximately £3.7m has been secured from developers. This comprises £1.1m for a park and ride facility at Stratford-upon-Avon, £300,000 for traffic calming measures, £1.3m towards public transport and £400,000 for pedestrian and cycling facilities.

h. To facilitate energy conservation

Number of schemes incorporating energy conservation measures and number of renewable energy schemes supported

- the District Council is not able to monitor this indicator comprehensively at the present time. The intention is to incorporate it into an upgrade of the planning applications database that will operate from 1 January 2006.

i. To sustain water resources

Area of development allowed within floodplains and number of developments incorporating sustainable urban drainage systems

- the District Council is not able to monitor this indicator comprehensively at the present time. The intention is to incorporate it into an upgrade of the planning applications database that will operate from 1 January 2006.

j. To assist rural diversification

Number of diversification schemes supported

- the District Council is not able to monitor this indicator comprehensively at the present time. The intention is to incorporate it into an upgrade of the planning applications database that will operate from 1 January 2006.

k. To stimulate rural centres

Area of new commercial development permitted in Main Rural Centres

- since 1996 the following significant retail schemes have been implemented:

- Budgen, Bidford-on-Avon (0.4 ha. / 980 sq.m.)
- Co-op, Wellesbourne (0.4 ha. / 810 sq.m. plus extension comprising 330 sq.m)
- Co-op, Studley (replacement of existing store with no additional floorspace involved)

Proposals for large food stores on the edges of Shipston-on-Stour and Southam have been dismissed on appeal.

l. To promote Stratford-upon-Avon town centre

Measures of vitality and viability

i. Diversity of main town centre uses

The Health Check carried out for the District Council by Bert Nicholson Associates in 2003 remarked on the attractive mix of both independent retailers and national multiples in the town centre.

However, the lack of convenience shops was noted. The latest information available shows that about 7% of the total number of units in the town centre are convenience goods outlets, compared with the Great Britain average of close to 9.5% (Source: Experian Goad).

We will carry out an occupancy survey of units in the town centre on a biennial basis.

ii. Presence of national multiples and high-profile retailers

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 (Source: Experian Goad).

We will carry out a survey of the situation on a biennial basis.

iii. Retail and leisure floorspace permitted and completed

There has been no significant increase in floorspace in the town centre in recent years. The refurbishment of Bell Court (now known as Town Square) in c.2002-03 did not involve the creation of additional retail floorspace.

iv. Operator demand

As identified in the Bert Nicholson study, the FOCUS database indicates a healthy level of interest in Stratford-upon-Avon, with a total of 71 requirements listed in October 2004. This is the seventh-highest level of operator demand amongst all the city and town centres in the region.

v. Zone A shopping rents

	1987	1998	1999	2000	2001	2002	2003	2004	2005
Value	70	115	115	120	120	125	125	125	130

Source: Colliers CRE based on their opinion of rental values (£/sq.foot/annum.)

Comment

This is the recognised source of published rental data and is updated each year. It is evident that retail units within the primary shopping area of Stratford-upon-Avon town centre can command a high, and increasing, rental value. The figure is slightly higher than that for Banbury, Leamington Spa and Redditch, although considerably lower than for Cheltenham and Solihull. The figure reflects the likelihood of securing high turnover although the downside is that many small, specialist traders cannot afford a prime location in the town centre.

vi. Proportion of vacant street-level property

It is evident that the vacancy level is very low. Approximately 6.5% of units are vacant compared with the Great Britain average of 10.5% (Source: Experian Goad). It should be appreciated that vacancies can occur in even the strongest centres, reflecting the normal turn round of retail outlets.

We will carry out a survey of the situation on a biennial basis.

vii. Quality and mix of services and other uses

There is a wide range of professional and business services, food and drink outlets and visitor attractions provided in the town centre. In large part this reflects the importance of Stratford-upon-Avon as a tourist destination.

We will carry out a survey of the situation on a biennial basis.

viii. Pedestrian flows

The District Council commissioned a pedestrian count in October 1996. It would be appropriate to have a further survey undertaken in October 2006 so that a comparison can be made.

m. To support sustainable tourism

Scale and location of new visitor accommodation

Monitoring of this indicator has recently commenced for regional purposes. This covers schemes involving more than five bedrooms. There were no permissions granted during the year 2004-05, although approval was given for the conversion of the Coach House Hotel in Stratford-upon-Avon to residential use, that involves the loss of nine bedrooms.

n. To provide leisure opportunities

Area of public open space provided in new development and lost to other forms of development

- the District Council is not able to monitor this indicator comprehensively at the present time. The intention is to incorporate it into an upgrade of the planning applications database that will operate from 1 January 2006.

Value of developer contributions towards public open space

- the District Council adopted supplementary planning guidance in March 2005 whereby financial contributions towards off-site provision of open space will be sought in appropriate circumstances. The amount of such contributions will be given in future editions of the AMR.

5. Policy Performance - assessment

One of the key purposes of the Annual Monitoring Report is to provide an assessment of how current policies in the plan are performing. In particular, it is important to gauge whether a policy is having the desired effect, or an unexpected impact, and whether there are any lessons to be learned when the plan is reviewed.

At the present time, the District Local Plan is in a transitional period. The first plan was adopted in May 2000 and, strictly speaking, continues to form part of the development plan for the District, along with the Warwickshire Structure Plan and the West Midlands Regional Spatial Strategy.

The District Local Plan Review has reached an advanced stage in its preparation. The Inspector's Report of the Public Inquiry was received in April 2005 and Proposed Modifications to the Draft Plan were placed on deposit on 27 October for a six week period.

In accordance with regulation 48 of the Local Development Regulations, it is expected that AMRs should assess the performance of 'saved' policies. However, many of the policies in the adopted District Local Plan no longer conform to the Structure Plan and/or deal with issues that are covered by policies in the Local Plan Review. Given these circumstances, we take the view that there would be more value in monitoring the implementation of policies in the Review, particularly as this will provide a valuable basis for deciding the scope and content of the Local Development Framework.

Controlling industrial development in the District

The following policies in the Local Plan Review are used to control the amount and distribution of industrial development in the District: STR.1, STR.3, STR.4, COM.1, COM.16, COM.17 and CTY.2.

The Warwickshire Structure Plan (WASP) requires Stratford District to make provision for 81 hectares of industrial land during the plan period 1996–2011. The current level of provision for this period is about 128 hectares. This substantial level of over-provision is mainly due to the scale of development at the Gaydon Proving Ground.

It is a strategic objective of the WASP to concentrate most new development in the main urban areas, including Stratford-upon-Avon, and preferably on brownfield land. The Local Plan Review also seeks to ensure that the employment needs of the rural parts of the District are adequately catered for in a sustainable manner.

Of the 128 hectares provided to date during the plan period, 20 hectares (16%) have been provided within or on the edge of Stratford-upon-Avon; 45 hectares (35%) in the Main Rural Centres, 19 hectares (15%) in rural locations and 44 hectares (34%) at Gaydon Proving Ground. On that basis, 51% of the overall industrial land provision is located in the larger settlements in the District.

About 72% of the industrial land provision has involved brownfield land, compared with the WASP target of 60%.

Putting to one side the specific factors that have justified the large-scale development at the Gaydon Proving Ground, it is reasonable to conclude that the policies have been effective in assisting to deliver objectives of the development plan relating to the amount and location of industrial land.

Controlling residential development in the District

The following policies have been applied to control the amount, type and distribution of residential development in the District: STR.1, STR.2, STR.2A, STR.4, COM.1, COM.12, COM.13, COM.14, CTY.2A, CTY.5, CTY.6 and CTY.8.

The WASP initially established the strategy for the amount and location of housing provision in Stratford District for the period 1996-2011. It emphasises, in particular, the need to ensure that most development takes place in the main town of Stratford-upon-Avon, and that emphasis is given to re-using brownfield land.

More recently, the Regional Spatial Strategy has reduced the housing requirement, with the provision for 2200 dwellings (maximum) now to be made between 2005 and 2011. The latest analysis indicates an over provision of 289 dwellings.

Of the 5611 dwellings built between 1996 and March 2005, 1663 (29.6%) were built in Stratford-upon-Avon, 2017 (36.0%) in the Main Rural Centres, and 1931 (34.4%) in the rural parts of the District.

2715 (48%) of dwellings completed since 1996 are located on brownfield land. This compares with the 56% shown as an indicative figure in the WASP for the period 1996-2011, and a regional target of 76% for 2001-2011 given in the Regional Spatial Strategy. The low proportion achieved in Stratford District is mainly due to planning decisions made before the targets were adopted.

750 new build affordable dwellings (rented or shared ownership) have been provided since 1996. Of these, 674 (90%) were secured as part of private development and 76 (10%) on other sites. To date, only 14 dwellings have been provided through the operation of Policy COM.1 ('local choice') and 10 dwellings under the provisions of Policy CTY.5 ('rural exceptions'). A number of schemes are now beginning to materialise through the former mechanism, although there is an important issue to address relating to the identification of local housing need and meeting it effectively at the local level.

Providing infrastructure and services related to development

It is accepted that development should be supported by adequate and appropriate levels of new or improved infrastructure. It is also reasonable that developers should contribute towards meeting the cost of mitigating the impacts of their development. The following policies seek to ensure that appropriate levels of developer contributions are secured: DEV.6, IMP.4, IMP.6 and IMP.7.

Since 1996, around £7m has been secured from developers towards improving infrastructure and services across the District. Of this, approximately £4.5m relates to Stratford-upon-Avon and includes £1.1m towards car parking provision (specifically park and ride), £900,000 for highway improvements, £600,000 for public transport and £1.2m on education.

The Council is currently streamlining its approach to securing developer contributions, to ensure that the process is efficient, transparent and more accountable. For example, a methodology has been developed to quantify the level of transport contributions that could potentially be secured through the amount of development identified in the District Local Plan Review. This is set out in supplementary planning guidance that is reviewed on an annual basis.

The estimated total cost of transport schemes that would be necessary to support proposed development in Stratford-upon-Avon, in accordance with the Local Plan Review, is about £7.937m. Of this figure, developers are currently expected to contribute about £2.187m. To date about £194,000 has been secured. Part of this amount is specifically earmarked for improvements to sustainable transport. We will be monitoring the impacts of the identified schemes when they are implemented.

The District Council adopted guidance on the submission and implementation of travel plans as long ago as July 1998. Since then, twelve such plans have been completed through legal agreement linked to planning permissions. The intended objective has been to minimise car travel associated with the developments. There are issues to be addressed about how to monitor whether targets for modal shift specified in the legal agreements are being met.

Meeting key development principles

This section in the Local Plan Review takes forward the overall land-use strategy for the District by identifying a number of significant principles which also influence and control the location of development.

Green Belt (Policy PR.2) - during the year 2004-05, no planning permissions were granted for new dwellings. Four permissions for industrial and commercial development were granted: at Bearley Mill (1,695 sq.m. for retail and storage), Bearley Airfield (1,550 sq.m. for storage), Edstone Hall (960 sq.m. for offices) and The Slough, Studley (1,325 sq.m. for general industry). All of these were fully justified on a case by case basis.

Farmland (Policy PR.4) - there has been no significant loss of best and most versatile agricultural land as a result of planning permissions granted during the year 2004-05. The development proposal west of Shottery (Proposal SUA.W) in the Local Plan Review affects a small amount of Grade 2 agricultural land. The Inquiry Inspector accepted that this was justified given the wider benefits of the proposal that would not be achieved by using land of lower agricultural quality elsewhere.

Resource protection (Policy PR.5) - this is an issue of fundamental importance and the principles identified in the policy should be thoroughly considered through the planning process. However, it is necessary for national planning policy to provide an effective basis for local decision-making. To date, the policy has been effective in deterring significant impacts but it is questionable whether it could have a more fine-grained influence due to the range of often conflicting issues that need to be addressed. It is anticipated that this issue will require further consideration in framing a more rigorous and effective policy in the Local Development Framework.

Renewable energy (Policy PR.6) - energy conservation is now one of the major challenges faced by society as a whole. The planning process has a key role to play in this by taking a positive approach to such schemes, both in relation to large-scale projects and those involving individual buildings. However, it is necessary to assess thoroughly the impact of proposals in order to decide whether the wider benefits outweigh the local disbenefits.

Flood defence (Policy PR.7) - another issue that has taken on a national significance in recent years and, compared with those issues covered by the previous two topics, one that has been addressed effectively by the planning process in Stratford District. The involvement of the Environment Agency has been fundamental in ensuring that unacceptable impact of development on the floodplain and on flood risk is prevented.

Protecting and enhancing environmental features

The natural and built environment makes a vital contribution to the character of Stratford District and it is essential that the quality of these features is protected and, wherever possible, enhanced.

Cotswolds AoNB (Policy EF.1) - this designation has been effective in ensuring that the quality of the landscape has been protected from harmful development. There are no examples of significant housing, industrial, commercial or leisure development being granted planning permission within that part of the AoNB lying within Stratford District since 1996. The District Council is a member of the Cotswolds Conservation Board which seeks to protect and enhance the character of the AoNB.

Special Landscape Areas (Policy EF.2) - although its status is not as great as for the AoNB, this designation has been effective in helping to resist development that would have a harmful effect. National guidance requires a more rigorous assessment of landscape quality to be carried out if this local form of designation is to be retained.

Areas of Restraint (Policy EF.3) - another form of local designation that has been effective in protecting specific areas from harmful development. There have been no recent examples of planning permission being granted that were contrary to the provisions of this policy.

Historic landscape (Policy EF.4) - although it has been used in a small number of cases, the basis of this policy needs to be supported by more rigorous analysis to increase its effectiveness.

The various policies relating to the protection of wildlife, trees, archaeology, conservation areas and listed buildings have all operated effectively in resisting harmful development. They are each dependent on accurate and rigorous information that can be referred to on a case by case basis.

Promoting and securing appropriate standards of development

It is essential that all forms of development should be sensitive to and reflect the character of the area, and also that the necessary technical standards are achieved.

Layout and design (Policy DEV.1) - provides an invaluable checklist of issues that need to be considered in determining planning applications. It is founded on national planning guidance and has itself provided the basis for the District Design Guide.

Car parking (Policy DEV.5) - together with associated supplementary guidance, national policy on car parking provision is applied. In particular, this utilises maximum rather than minimum standards. Some concern has been expressed about the effect of this approach on the function of residential, industrial and commercial areas and impact on neighbouring areas due to reduced levels of on-site parking. Further research on the application of maximum standards to local circumstances would be useful.

Drainage (Policy DEV.7) - responds to the critical issue of protecting water resources. Incorporation of SUDS into development proposals is becoming more commonplace and developers are now responding more positively through the negotiation process.

Energy conservation (Policy DEV.8) - relates to the critical issue of climate change by seeking to reduce energy consumption. To date, it has not been rigorously applied in seeking to encourage developers to utilise effective features. It is anticipated that this issue will require further consideration in framing a more effective policy through the Local Development Framework. For example, seeking to incorporate higher standards of energy efficiency in new development will reduce carbon dioxide emissions and help to tackle climate change.

Access for people with disabilities (Policy DEV.9) - generally effective in ensuring that buildings and the wider environment are accessible, although some criticism has been expressed that more should be done. Supplementary planning guidance has been produced by the District Council to assist this process.

Supporting and building communities

The success of the District Local Plan Review will be measured by the extent to which it contributes to the character and function of communities.

Local Choice (Policy COM.1) - this is a key component of the strategy of the Plan by providing scope for communities to meet their own needs. At a time when most development should be focussed on Stratford-upon-Avon, in accordance with regional planning policy, this approach seeks to ensure that small-scale housing and employment development can take place in smaller settlements where clearly justified. To date, very few schemes have been promoted in accordance with this policy although it is anticipated that more will emerge through the Parish Plan process. Small housing developments in Brailes and Long Compton, both recently completed, are the first to be implemented.

Local shops and services (Policy COM.2) - the effect of this policy has been variable with some success in resisting the loss of local facilities but also instances of a facility being lost (including on appeal). In this respect, every case is different and extensive evidence is required to support a case for retaining a local facility in the face of conversion to another use. It should be noted that the general store at Moreton Morrell has recently closed, which means that it is no longer categorised as a Local Centre Village for the purposes of Policy STR.1 and the operation of Policy COM.1.

Open space (Policies COM.4,5,6) - provision of sufficient open space makes an important contribution to people's health and to the amenity of an area. The District Council has undertaken an audit of open space and is due to produce a Green Space Strategy to ensure that sufficient provision is made in quantitative and qualitative terms. It is important to ensure that development makes sufficient provision, either on-site or off-site. The District Council has produced supplementary guidance to help assess the scale and nature of provision by developers. Protection of existing open spaces has been raised in profile over recent years and the involvement of Sport England has helped to resist their loss except where fully justified.

Bus service support (Policy COM.7) - the District Council has been working in partnership with the County Council and other stakeholders through the Rural Transport Partnership to improve and promote rural bus services. One of the initiatives presently being promoted is the Back and 4th Transport which is a door-to-door bus service in the local area. By February of this year the service had carried 14,000 passengers, trained 45 drivers and acquired three fleets of vehicles. About 30% of the passengers were elderly people who are often without access to private cars. The scheme has been successful beyond expectation as the original business plan estimated that only 400 passengers would be carried during this period.

Travel information has been identified as one of the key factors that influences patronage of bus services in the area. The partnership has been able to deliver about 10 information boards in various villages across the District. The scheme has also supported the hiring of buses to meet the needs of many groups and organisations in the District to access recreation and tourist activities.

Other initiatives promoted through the RTP include the Southam Shuttle which was launched in January 2003 and links surrounding villages with the market town at the hub.

Of fundamental significance is the construction of a 750-space park and ride in Stratford-upon-Avon. Policy SUA.4 has been influential in bringing this project forward. The first phase of the scheme opened on 21 November 2005 and the remainder is scheduled to be completed by January/February 2006.

Rail service support (Policy COM.8) - the intention of providing a bus-rail interchange at Stratford station has been fully endorsed by the Local Plan Inquiry Inspector. It has been merged with the proposal to redevelop the Cattle Market (Proposal SUA.1) in order to emphasise the importance of providing such a facility as an integral part of any scheme affecting this site and to assist its delivery. It is anticipated that a planning application for the site will be submitted early in 2006.

The District Council is a key partner in the Shakespeare Line Steering Group which seeks to promote the line between Stratford-upon-Avon and Birmingham for a wide range of journeys and to improve facilities at stations along the route.