

Appendix 1: Part 3

Salisbury Housing Market Area

Individual Settlement and Housing Market Area Profile

Committee Draft

October 2017

Introduction

This document is one of four Housing Market Area Profiles which have been prepared to inform the Swindon and Wiltshire Joint Spatial Framework: Issues Paper. It provides an assessment of the main settlements in the Salisbury Housing Market Area and the strategic issues they face. This is a first step to understanding the opportunities and constraints of growth before considering how each place could develop sustainably; whether its role continues as currently planned or how it should change.

In combination with profiles for the Chippenham, Swindon and Trowbridge Housing Market Areas, this better understanding of our main settlements can inform the assessment of whether and how the housing and employment needs in each market area can be met.

The profiles contained in this document draw on existing published data sources such as the current understanding of the role and function of each main settlement, the 2011 Census, the Council's own monitoring reports and other local area documents such as neighbourhood plans.

Each profile presents a snapshot assessment of progress with the current strategy included in the Wiltshire Core Strategy, a picture of environmental constraints, the local community's vision (where there is neighbourhood plan) and the position from providers of underlying infrastructure (transport, water and education) which is essential to every settlement but which has the potential to also be a significant barrier to further growth.

The main findings for each settlement are summarised below followed by a set of issues specific to each settlement. These identify where the current development plan strategy may need to change. They are phrased as questions because the vital part of this stage in the Local Plan review is to invite community and stakeholder input on how the current strategy should change; what issues it should address and how future needs can be met by sustainable development.

Salisbury Housing Market Area

The Salisbury Housing Market Area encompasses the area around the principal settlement of Salisbury and the market towns of Amesbury, Tidworth and Ludgershall.



The 2017 SHMA places the city within the centre of Salisbury Housing Market Area (HMA). The study identifies the need for housing in this market area over the period 2016-2036 to be 8250 dwellings. This would represent a reduction on the WCS period 2006-2026. The FEMAA notes a potential shortfall of labour within the Salisbury HMA.

The Salisbury/Amesbury/A303 FEMA represents a corridor with links toward Southampton and into the south-east. The scientific, research and development sector is particularly important in this location. Manufacturing is far less important in this FEMA, accounting for only 5% of total employment. Public services are more important in this area, with 29% of employment in public administration, defence, education, health and residential & social care.

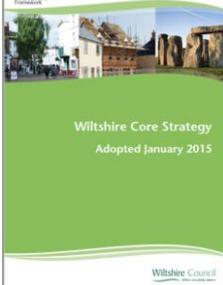
The 2017 FEMAA forecasts 11,400 jobs for 2016-36 with the main growth occurring in Financial and Business Services, Public Administration and Defence, and Education and Health. Manufacturing is set to decline. In terms of B-use floor space, the study forecasts for 2016-36:

Use class	Use	Growth in floor space (in m2)
B1a	Offices (other than financial and professional services)	45,880
B1b	Research and development	89,500
B1c	Industry that can be carried out in a residential area	2,600
B2	General industry	-35,050
B8	Storage and distribution	3,250

Taking into account churn, re-use of employment sites and accounting for additional land requirements, the FEMAA forecasts a total of up to 15.6 ha for office space, and 45 ha for industrial. This equates to up to 0.8 ha and 2.2 ha annually respectively for the entire Salisbury/Amesbury/A303 FEMA.

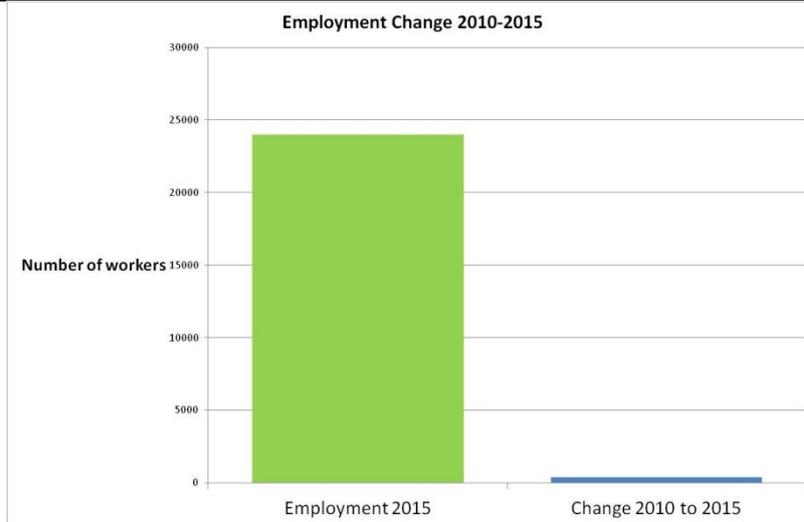
Salisbury

The city is the main centre of south Wiltshire, acting as a focal point for a wide rural catchment with its influence stretching into parts of Hampshire and Dorset. Salisbury Cathedral and the city's proximity to Stonehenge make Salisbury an international tourist destination and this brings significant revenue to the city. It is designated as a Principal Settlement in the WCS.

 <p>Wiltshire Core Strategy Adopted January 2015</p> <p>Wiltshire Council</p>	<p>The Wiltshire Core Strategy Vision</p> <p><i>“Salisbury will have developed its historic role as a thriving and prosperous city that is self-contained providing the necessary range of homes to support this role and offering a range of employment, retail, cultural and leisure facilities to a wide hinterland, stretching into Hampshire and Dorset. Its own distinct character will have been retained and enhanced through the successful implementation of the Salisbury Vision including schemes such as the market place enhancement.</i></p> <p><i>Salisbury’s tourism role will have been enhanced and there will be a lively café culture around the enhanced market square, along with improved leisure, arts and theatre facilities. Partnership working with the cathedral authorities and English Heritage at Stonehenge on implementation of their respective management plans will have greatly enhanced Salisbury’s reputation as a major international tourist destination.</i></p> <p><i>The retail, leisure and cultural function of the city will have been greatly enhanced by the successful redevelopment of the Maltings/Central Car Park that is well integrated into the city centre, bringing benefits for the whole area. Significant growth in new homes and jobs will have been successfully integrated into the city in a manner that meets local needs. The highly valued views of the Salisbury roofscape and spire views will have been retained. The new homes, balanced with the economic opportunities, will have provided local opportunities to work and live in the local area and will have successfully reduced the amount of out-commuting.”</i></p>
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Economy

- A presence of financial/business services (led by James Hay’s UK HQ with around 500 staff) remains significant, despite a loss of Capita and Aviva Financial Services jobs.



Self-containment

	2001	2011	change
% of employed residents working in the town	66.1%	60.4%	-5.7%

The WCS allocates 29 ha of employment land.

- Fuggelstone Red 8 ha;
- Longhedge 8 ha;
- Churchfields 5ha;
- UKLF Wilton 3ha;
- Former Imerys Quarry 4ha.

Since 2011, 0.3 ha of employment floor space have been completed. At 2017, 1.03 ha of employment floor space remains committed (non-implemented planning permissions). Employment delivery as an element of the mix of uses on strategic sites has not met expectations in the WCS.

The allocation at Churchfields has not been implemented. The site has been the subject of masterplanning and detailed negotiations between land owners. This has highlighted more complexity to delivery than was initially anticipated when the site was originally allocated. However the work is ongoing and remains a deliverable option.

The Strategic Economic Plan refers to work with the Highways Agency to ensure that the A36 can fulfil its strategic role and also support growth in and around Salisbury. The SEP suggests maximising opportunities to accelerate the delivery of strategic housing sites through investment in infrastructure and enabling works.

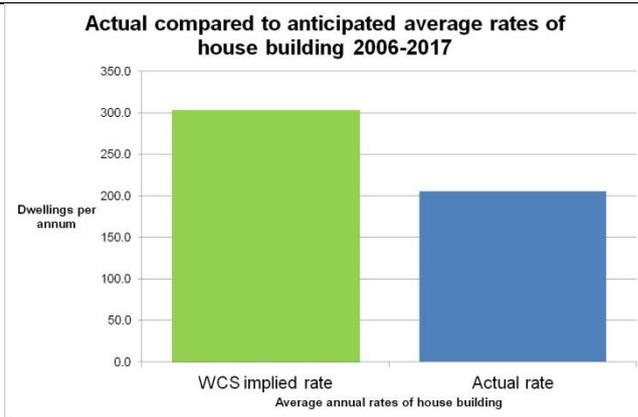
Town Centre: The WCS seeks to ensure that Salisbury can maintain its place as an important retail centre in the face of intense sub-regional competition, including from nearby centres such as Southampton, Bournemouth and Winchester. It is intended to deliver up to 40,000 m2 gross external area retail and leisure floor space and significant enhancements to the retail core of Salisbury in order to clawback expenditure.

The Salisbury Central Area Regeneration Programme comprises a number of brownfield development opportunities including office and employment space, housing, hotels, and cultural facilities including sites at The Maltings/Central Car Park and Churchfields.

Redevelopment of the Maltings/Central Car Park, complementing the historic street pattern

of Salisbury, will provide additional retail floor space and a choice of department stores. Funding has been secured through the Local Growth Fund to address land quality issues and support scheme viability. A mixed use scheme is being prepared for retail, leisure and housing.

The Wiltshire Council Retail Review (2015) suggests there is modest capacity for additional convenience goods retail (2,162 m2 by 2026). For comparison goods, the study states that comparison goods floorspace capacity will grow substantially by 2024-2026 based upon a constant market share. Further capacity would be generated where a city centre development scheme is able to raise the city’s market share.



Housing

House building has been below anticipated rates. The city has a significant supply of land already permitted or allocated. There continues to be delay, however, in delivering land for housing at Churchfields, allocated for 1,100 dwellings and a central proposal for the development of the City.

Affordable housing was 28% of all homes built, below target levels. The ratio of house price to earnings rose from 10.5 to 11.5 between 2011 and 2016. The ratio is above the average for settlements in Wiltshire.



Infrastructure

Transport: measures in the Salisbury Transport Strategy are being refreshed. There are air quality concerns in the city centre and on Wilton Road. Congestion on the A36 (T) and other arterial roads constrains growth. The historic street layout is not designed for high volumes of motor vehicles, but maintaining the attractiveness of Salisbury is important to the tourist industry. Alternatives to the private car could be improved. The City lacks cross-city bus routes and poor access to the station. These could be improved (possibly including provision of a new parkway station at Wilton, for which a feasibility study is underway). This would benefit the tourism industry. The Park & Ride network has capacity to absorb demand if city centre parking is reduced. There may be potential for rail-freight at the Imerys site.

Schools: Primary provision has little or no capacity and caters for immediate forecast needs only. This current “at capacity” situation for primary aged pupils is expected to feed through to the secondary level over the next 10 years to challenge and exceed current capacity. Growth would need to involve allocations large enough to provide new primary provision. Secondary expansion is possible in some areas. The large surplus of places available at Sarum Academy is expected to be taken up by existing demand coming forward however the school does have capacity to expand further.

Water Network: Wessex Water states that there is planned investment to help reduce phosphates and provide capacity between 2020 -2025. Development of the works is likely to extend onto land that Wessex Water owns outside of the existing operational site.

Neighbourhood Plan

No neighbourhood plan is in preparation for Salisbury. Three neighbourhood plans are under preparation outside Salisbury: Wilton, Whaddon & Alderbury, and Odstock.

River Avon Nutrient Management Plan

The Nutrient Management Plan aims to reduce and manage phosphorus levels in the River Avon Special Area of Conservation (SAC), in accordance with international obligations, principally in the EU Habitats, Wild Birds and Water Framework Directives. It will also help to facilitate development and change in the catchment of the river by ensuring that they do not add to the phosphorus load in the river in a way that might conflict with the conservation objectives for the SAC. The Plan includes an ‘ambition target’ for phosphate levels by 2021, an interim step to achieving favourable status. The Plan is currently under review.

Constraints

See map.

The overall potential for significant urban regeneration is medium. Preserving the setting to Salisbury Cathedral constrains the extent of development on surrounding slopes to the City. Extensive corridors of land are areas of flood risk (FZ2 and 3). An Area of Outstanding Natural Beauty lies to the south of the City. Further development may also risk raising phosphate levels in the River Wyle to levels that have adverse effects on the River Avon SAC.

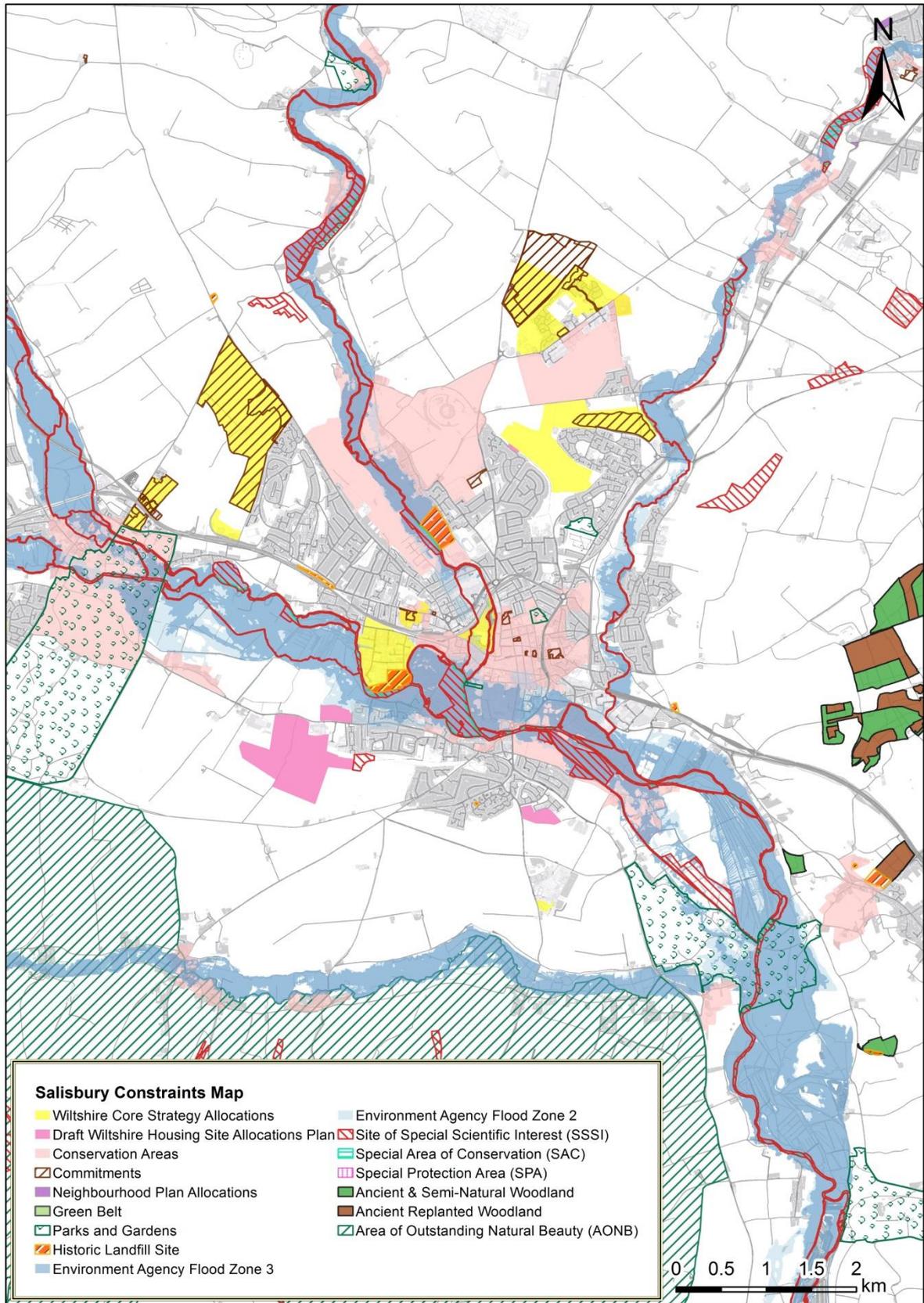
Settlement Strategic Issues

Key findings

- Major investments in the city centre on regeneration sites, a main WCS focus, have yet to be realised. The delivery of city centre schemes could be a significant support for the city’s retail and tourism sector.
- Rates of employment development (in B use classes) have been slow and new employment land difficult to realise on strategic sites.
- Large strategic mixed sites on the periphery have only recently commenced.
- There are possible infrastructure and environmental constraints to growth, including the impact of increasing phosphate levels affecting the River Avon SAC.

Issues

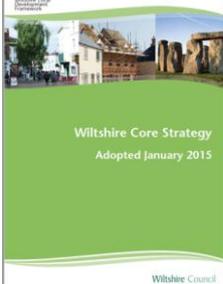
- Should the role of the City change in emphasis from that envisaged in the WCS? If so, how?
- What potential is there for economic growth, in what sectors and what land and premises will need to be provided? Are current employment land allocations sufficient?
- Is there scope to bring about more re-use of brownfield sites to limit the loss of greenfield land, such as at Churchfields? If so, how could this be realised?
- Looking to 2036, what should be the key investments in transport or other major infrastructure?



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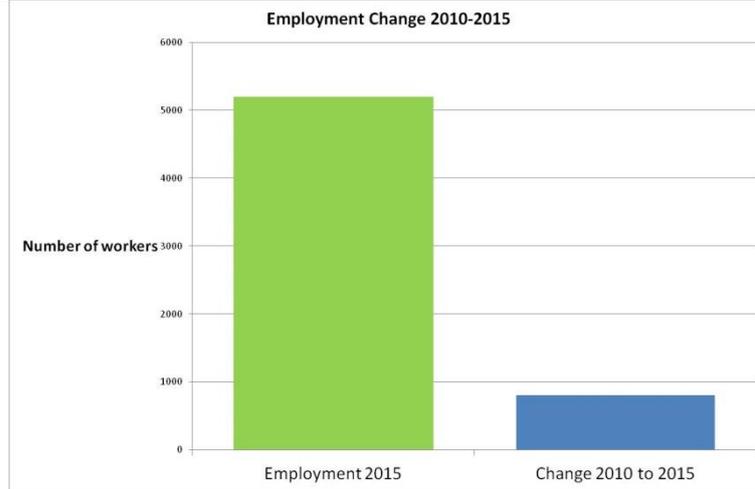
Amesbury, Bulford and Durrington

Amesbury is situated some eight miles north of Salisbury with Salisbury Plain, a large military training area, further to the north. It is located on the A303, a major arterial route from London. The town is surrounded by an ancient landscape: it is close to the World Heritage Site of Stonehenge. They are designated as a Market Town in the WCS.

 <p>Wiltshire Core Strategy Adopted January 2015</p> <p>Wiltshire Council</p>	<p>The Wiltshire Core Strategy Vision</p> <p><i>"Amesbury will continue to be the focus of managed growth within the Community Area. The town will have a good choice of transport and provide a good range of services including retail and health, acting as an important service centre to many of the villages. It will have good levels of employment, including the specialist sectors within the MoD, QinetiQ at Boscombe Down and the scientific research at Porton Down. Amesbury will be a thriving community reflecting the aspirations of its residents. It will be a place where people want to stay, attracting new residents, businesses and visitors alike. Managed growth will have provided new homes and jobs, which support improved services and retail choice and cement Amesbury's own specific identity as a self-supporting community which has reduced the need to travel to larger urban centres like Salisbury or other larger centres along the A303 corridor."</i></p>
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Economy

- Solstice Park: Southern UK Distribution Centre for TJ Morris (Home Bargains) creating up to 1000 logistics jobs, plus new buildings for UK Headquarters for The Tintometer (AEM), for example, and further plots are coming forward.
- Boscombe: QinetiQ operates MoD Boscombe Down (2000+ staff) under a Longterm Partnering Agreement to carry out aerospace development, maintenance and training facilities.
- Defence-related and life science developments at Porton: new investment by DSTL, Porton BioPharma now the commercial operator for PHE (as PHE move functions to Harlow); and the Science Park to provide flexible investment space for the sector.



Self-containment

	2001	2011	change
% of employed residents working in the town	41.9%	37.6%	-4.3%

Solstice Park (64 ha) is one the largest employment areas in the County. Since 2011, at Amesbury, 9.8 ha of employment floorspace has been completed. The largest completion is a regional distribution centre at Solstice Park (9.4 ha). In addition to industrial and commercial units, the site hosts hotels, leisure and retail units.

The 2011 Employment Land Review underpinning the WCS states that Amesbury represents an important Research and Development cluster in Wiltshire. While not situated at the town of Amesbury, Porton Down is an allocation of 10 ha. The site is subject to WCS Core Policy 5 (Porton Down Science Campus). Porton Down benefits from planning permission and is being built out. The SEP specifically points to the development of a cluster of health and life sciences companies adjacent to the Defence Science and Technology Laboratory (Dstl) and Public Health England with specialisms in microbiology, immunisation and medical care.

The WCS allocates 7 ha at Boscombe Down. However, subsequent to the recent MOD Estate Review the site has been identified as one that will play a key national role going forward and hence a whole site masterplan for the wider Ministry of Defence site is being developed covering 300 ha. A main aim is to develop the area as defence aerospace cluster which would bring significant associated growth opportunities to the immediate area. A Master Plan is being developed to facilitate further investments based around this sector which is likely to require significantly more land than the 7ha proposed and that a very much larger allocation could be supported by the market and is potentially feasible. Currently the master planning of the site sees potentially in the region of 14,000 new jobs being provided at the site over the next 15 years. This has implications for infrastructure and housing in the area.

The wider Salisbury Plain area will also receive an economic boost from the stationing of approximately an additional 4,000 troops as a result of army restructuring and its rebasing programme.

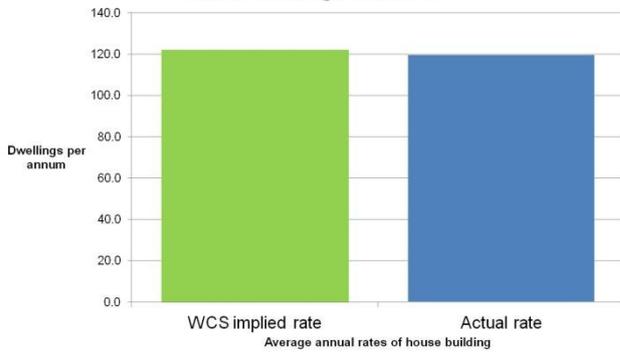
The completion of the Stonehenge Visitor Centre has supported local tourism and planned improvements to the A303 will increase the areas connectivity and enhance the area’s attractiveness to investment.

At Amesbury town, 3.8 ha of employment floorspace remain permitted but unimplemented. The largest commitment is a permitted data centre building at Solstice park of approx. 1.9 ha floorspace.

Town centre: The vitality and viability of the town centre has been supported by further convenience retail provision within and on the edge of the centre, although there have been concerns over the loss of other smaller retail units to non-retail use. A new local centre at Kings Gate meets day-to-day needs of the Archers and Kings Gate areas. There is however evidence of additional need in the area driven by the Army Rebasing Programme.

The Wiltshire Council Retail Review (2015) suggests, however, there is very little potential for additional convenience goods floor space, and no capacity for additional comparison goods floor space at Amesbury until 2026.

Actual compared to anticipated average rates of house building 2006-2017

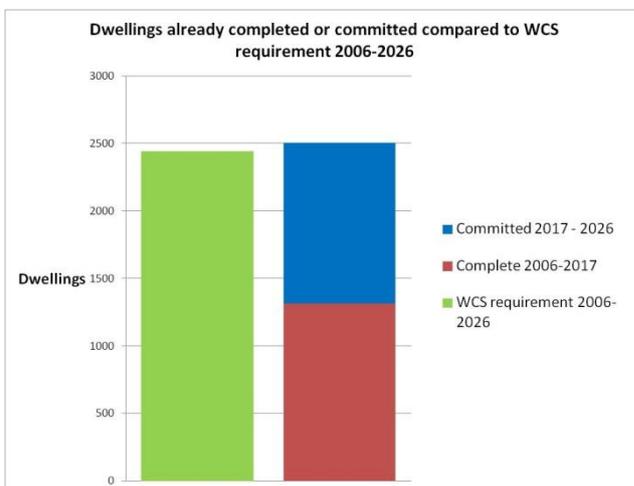


Housing

House building has been in accordance with anticipated rates. Land for a further 900 dwellings is allocated at Kings Gate, Amesbury. Amesbury has been the dominant focus for housing development.

Affordable housing was 27% of all homes built, below target levels. The ratio of house price to earnings rose from 9.4 to 10.8 between 2011 and 2016. The ratio is average for settlements in Wiltshire.

Dwellings already completed or committed compared to WCS requirement 2006-2026



Infrastructure

Transport: Good road connectivity is attractive to business investment but also contributes to significant net out-commuting. Peak time traffic delays could be addressed by planned improvements to the A303. Though there are good bus connections to Salisbury, connections to elsewhere are poor and difficult to improve. There may be potential for a new rail station at Porton but a feasibility study is required. Walking and cycling improvements around the Stonehenge World Heritage Site (WHS) and linking to Amesbury could bring

economic benefits of the WHS to the town. A new access from the A303 to Boscombe Down is being delivered by the Council and the further potential of this link being assessed.

Schools: A current shortage of local Primary provision arising from Army Basing will be addressed by a new school scheduled to open in 2019. Further significant growth would be likely to require a further new school. Secondary provision is being expanded and there is possibly room for some further expansion.

Water Network: Wessex Water states that additional capacity has been provided (Asset Management Plan 5 (2010-15)). There are currently no plans for further investment to increase capacity.

Neighbourhood Plan

There is currently no neighbourhood plan under preparation.

Salisbury Plain Masterplan

Resulting from army restructuring, a rebasing programme will result in locating approximately an additional 4,000 troops in the Salisbury Plain Area. This will create a significant local economic boost as well as additional requirements for infrastructure. The Salisbury Plain Masterplan sets out an overview of the proposed changes to the Salisbury Plain Training Area. It identifies the additional infrastructure requirements that are needed; social, education and economic. The requirement for 1217 units of military housing is over and above the general housing requirement set out in the WCS (540 Larkhill, 277 Bulford, 100 purchased at Tidworth, 300 Ludgershall).

River Avon Nutrient Management Plan

The Nutrient Management Plan aims to reduce and manage phosphorus levels in the River Avon Special Area of Conservation (SAC), in accordance with international obligations, principally in the EU Habitats, Wild Birds and Water Framework Directives. It will also help to facilitate development and change in the catchment of the river by ensuring that they do not add to the phosphorus load in the river in a way that might conflict with the conservation objectives for the SAC. The Plan includes an 'ambition target' for phosphate levels by 2021, an interim step to achieving favourable status. The Plan is currently under review.

Salisbury Plain Special Protection Area (SPA) – Habitats Regulation Assessment and Mitigation Strategy

The strategy addresses concerns over the effects of increasing recreational pressure upon breeding Stone Curlew populations. It provides an evidence base of predicted visitor levels and their effects. It suggests a range of mitigation measures to prevent adverse effects from accommodating anticipated growth to 2026.

Constraints

See map.

The overall potential for significant urban regeneration is low. There are relatively few environmental constraints compared to other main settlements in the plan area. The setting to the Stonehenge WHS would be a factor restricting westward extension to the town and a

possible design constraint on development elsewhere. Further development may also risk adverse effects on the River Avon SAC and Salisbury Plain SPA.

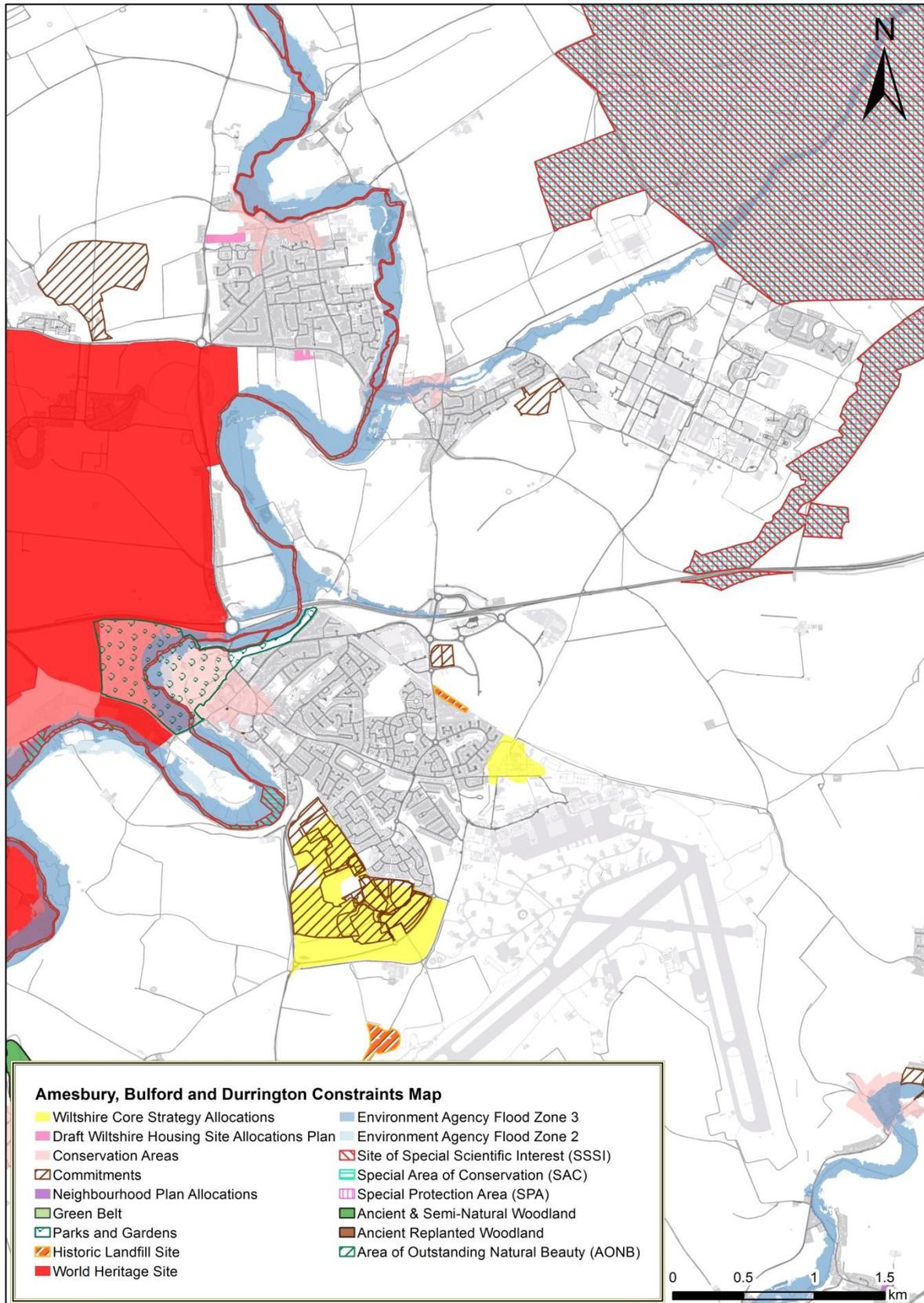
Settlement Strategic Issues

Key findings

- The area is a focus for investment containing two recognised business clusters creating job growth
- Amesbury is the dominant focus for housing development
- The trading position of the town centre needs consolidation
- Environmental designations may be a constraint on development

Issues

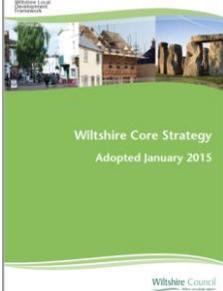
1. What more can be done to improve the range of services to improve the attractiveness of the area?
2. Should planning for Amesbury be distinct to planning for Bulford and Durrington?
3. How should the area capitalise on business investment? What amount of further housing is appropriate?



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Tidworth and Ludgershall

The small towns of Tidworth and Ludgershall, have complementary roles and are being planned for jointly to help them develop a number of shared facilities and resources. They are designated as a Market Town in the WCS.



Wiltshire Core Strategy
Adopted January 2015

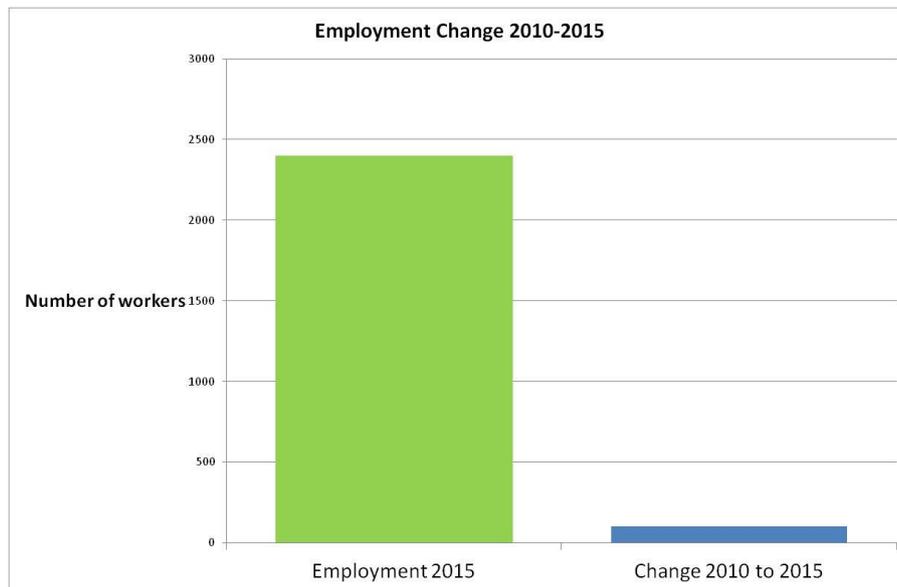
Wiltshire Council

The Wiltshire Core Strategy Vision

"The settlements of Tidworth and Ludgershall will have developed their complementary roles and taken full advantage of opportunities to develop sustainable brownfield sites. Growth will have reflected the need to create a more balanced community and act as a catalyst to attract inward investment with new employment opportunities complementing those provided by the MoD. The future of existing and former MoD sites will be carefully integrated into the needs of the wider community. The River Bourne Corridor, Salisbury Plain and Chute Forest will continue to provide social, environmental and economic assets to the area as part of a wider green infrastructure network which will be used and managed sustainably."

Economy

- Aspire Defence provides fully serviced living/working accommodation for a large proportion of British Army. It employs 700 staff work across 4 camps.
- Castledown Business Park: new phases start up and growth space in conjunction with TEN.



Self-containment

	2001	2011	change
% of employed residents working in the town	66.2%	66.3%	+0.1%

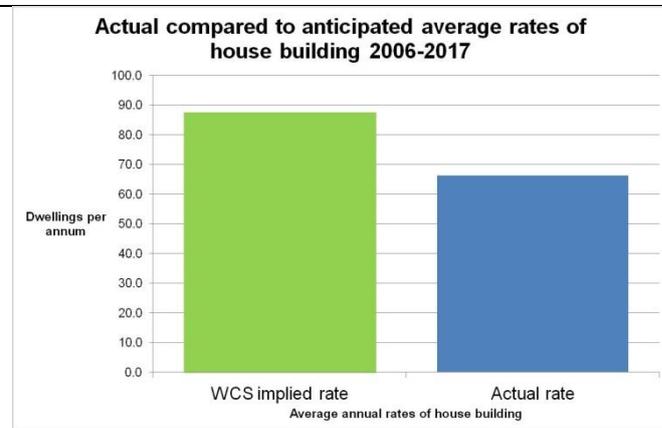
There is currently a shortage of quality employment premises for small and medium sized

enterprises, including incubation facilities and managed workspaces in the area. Castledown is mentioned as a 'success story' in the 2011 ELR in terms of the incubation space scheme which was completed in 2008 and had 90% occupancy levels, although this is only for approximately 5,000 sq. ft of space.

Land to the North of Tidworth Rd (Castledown) is a saved Kennet District allocation of 12 ha. The first two phases of which are now complete. The WCS allocation has not been permitted/ implemented. The 2011 ELR notes in regard to this site that this is a large site for a rural location and take up is likely to be slow.

Since 2011, 0.3 ha of employment floor space have been completed at Tidworth and Ludgershall. As of 2017, there remain 0.13 ha of employment floorspace permitted.

The wider Salisbury Plain area will also receive economic boost from the stationing of an additional 4,000 troops as a result of army restructuring and its rebasing programme.



Housing

House building has been below anticipated rates. The settlement has a significant supply of land already permitted or allocated.

There is a relatively young population age structure compared to elsewhere and the highest proportion of people of employment age (74%) in the plan area.

Affordable housing was 18% of all homes built, well below target levels. The ratio of house price to earnings rose from 7.5 to 9.4 between 2011 and 2016. The ratio is below the average for settlements in Wiltshire.



Infrastructure

Transport: despite a relatively good level of self-containment, there is still significant out-commuting encouraged by good road connectivity and because there is limited employment beyond jobs associated with the MoD. Additional growth is likely to have a detrimental impact on delays at the memorial junction in Ludgershall.

Schools: The Housing Site Allocations Plan reserves a site at Empress Way for a Primary School capable potentially of providing capacity for needs that may arise in Ludgershall after 2026. Wellington Secondary is being expanded and might be capable of some further expansion. Military relocations tightens primary school capacity in Tidworth and complicates forecasting needs.

Neighbourhood Plan

There are no neighbourhood plans under preparation at this market town.

Salisbury Plain Masterplan

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Constraints

See map.

Urban capacity is high, largely, however, because of the significant amount of potential MoD controlled land. There are relatively few environmental constraints compared to other main settlements in the plan area. Areas are reserved, however, for military use. Further development may also risk adverse effects on the River Avon SAC and Salisbury Plain SPA.

Settlement Strategic Issues

Key findings

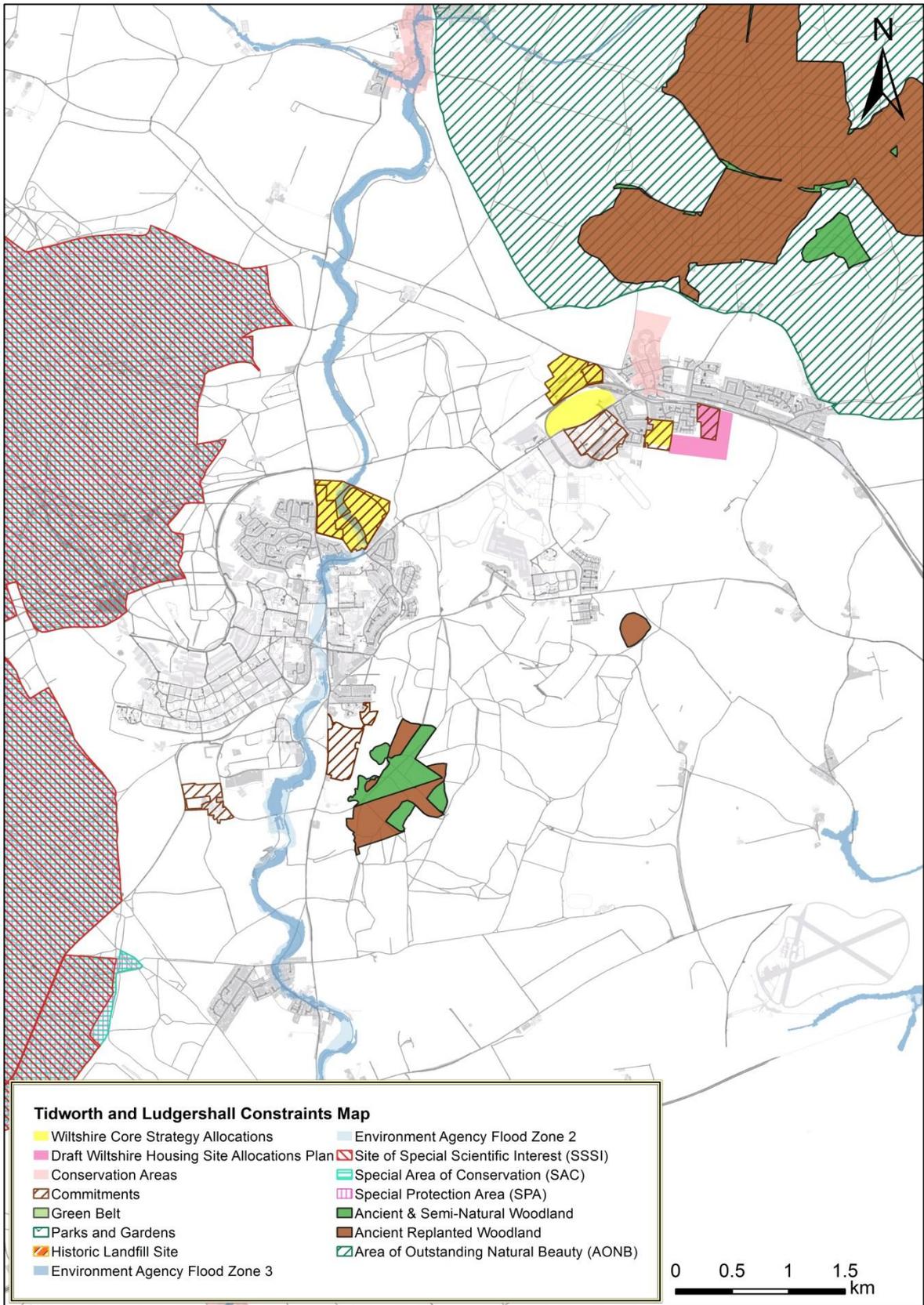
- The local employment base relies heavily on the MoD, which is also a major land

owner. This also affects the social and economic balance of the community

- A relatively significant amount of land for housing development is already allocated or permitted
- The WCS allocation has so far not been attractive to investment and there appears to be un-met demand for employment development
- Phosphate levels in the River may pose a constraint to development

Issues

1. How can growth be encouraged to do more to diversify the local economy and provide a more balanced age and social structure?
2. Should the vision be more specific in terms of the type of employment envisaged?
3. Are additional employment allocations required to provide fit-for-purpose space?



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Salisbury Housing Market Area – Strategic Issues

Overall the evidence presents a mixed picture on progress of the WCS strategy at main settlements in the Salisbury HMA.

The evidence suggests that there has been relatively little progress at Salisbury in terms of city centre regeneration projects and employment delivery. While housing delivery rates have been below what was anticipated there are a significant number of commitments underway or imminent.

Amesbury has seen housing delivery in line with anticipated rates and Solstice Park and Porton remain an important focus for additional economic growth and new investment. Job growth at Amesbury has been higher than at Salisbury.

The evidence suggests that economic diversification at Tidworth/Ludgershall is not progressing and job growth has been minimal. The impact of army rebasing may, however, provide a significant new impetus.

Environmental constraints, especially phosphate levels in the River Avon and possibly the need to protect breeding stone curlew on Salisbury Plain SPA, present a potential restriction to growth across the HMA. Improvements to the A303 will enhance the area's connectivity but elsewhere transport infrastructure requires upgrading, especially around Salisbury and Amesbury in order to support growth.

Strategic Issues for the HMA at this stage are:

- The SHMA suggests a modest decrease in housing needs in the Salisbury HMA, but the FEMAA states that a shortfall of labour could result. Could economic growth be hampered by insufficient housing over the plan period and should housing provision instead exceed assessed needs?
- A central proposal for Salisbury contained in the WCS, and therefore for the HMA as a whole, is the redevelopment of Churchfields, should this proposal be reconsidered? How can this opportunity be realised?
- Important business clusters in the HMA are quite detached from main settlements. Environmental constraints in the HMA might also possibly restrict further significant expansion of these main settlements? Is there a need to re-think where and how growth takes place in the HMA?