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Wiltshire Employment Land Review

Appendix 5: Floorspace and Employment Land Demand

Prepared for Wiltshire Council

December 2017

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1 Introduction

This paper sets out forecasts for employment growth, demand for employment floorspace (B Use Class) in sq m, and demand for employment land (B Use Class) in Ha for Wiltshire, over the period from 2016 to 2036. The baseline forecasts used in this paper are sourced from Cambridge Econometrics and Oxford Economics, and were produced in 2016. They have then been moderated using local evidence and consultations, to produce a hybrid scenario. The forecasts were originally used to inform work on the Functional Economic Market Areas Assessment (FEMAA) for Swindon and Wiltshire, undertaken by Hardisty Jones Associates in 2016-2017. A decision was made by the Steering Group for the Employment Land Review to use the same forecasts that had been used for the FEMA Assessment, to ensure consistency across the evidence base for the Local Plan.

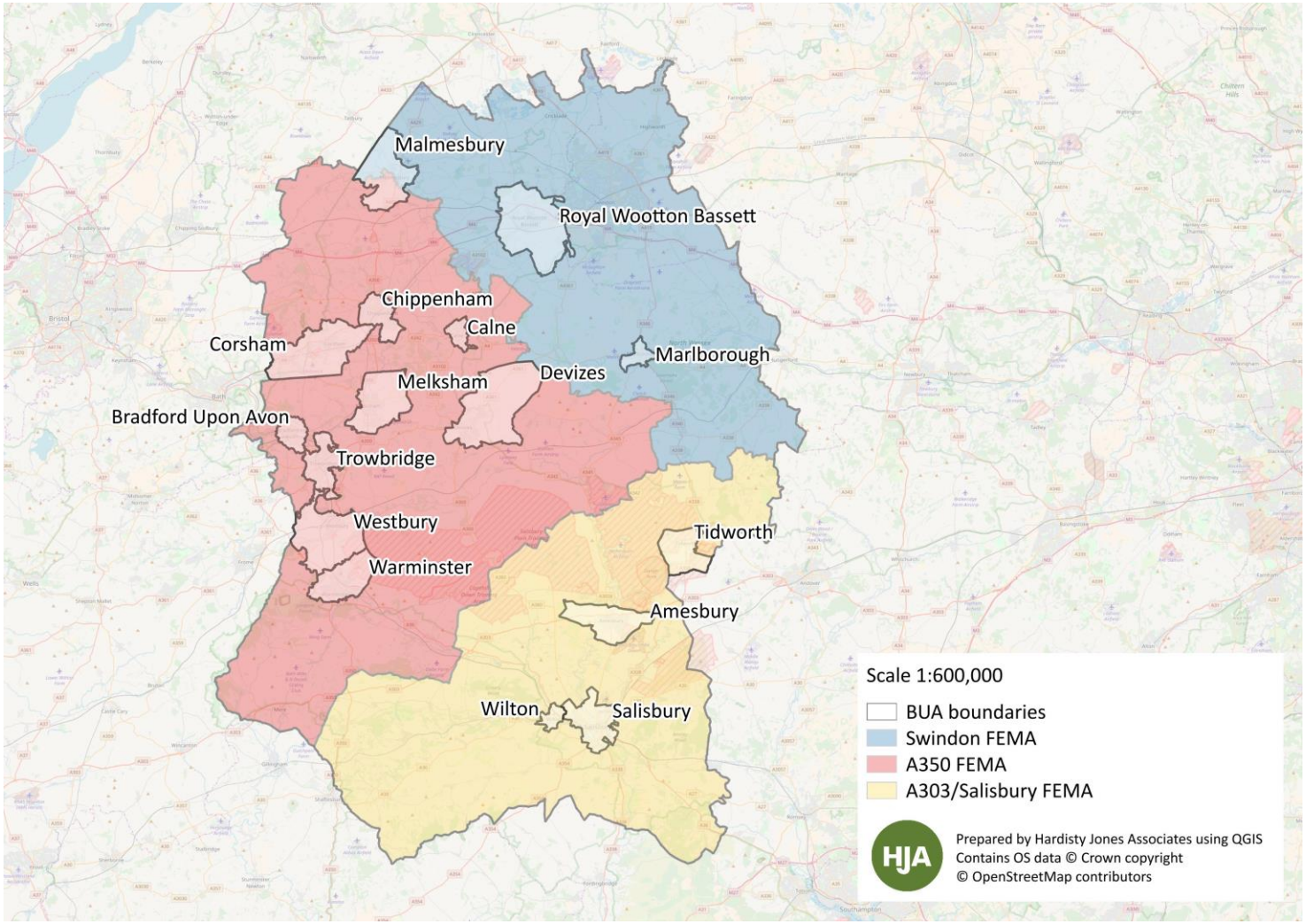
This paper comprises two main parts:

The first section sets out the process by which the forecasts for Wiltshire and the FEMAs within it have been developed. This work was undertaken for the FEMA Assessment in 2016, and has not been amended further, to ensure consistency with the study.

The second section sets out the process by which the FEMA level growth forecasts have been broken down to the main towns in Wiltshire, also known as Built Up Areas (BUAs), and the rural areas within Wiltshire.

The BUAs and FEMAs can be seen in the map in Figure 1.1 below.

Figure 1.1: Functional Economic Market Areas (FEMAs) and Built Up Areas (BUAs) in Wiltshire



2 Developing Growth Forecasts for Wiltshire

Full details on how the forecasts were developed for Wiltshire can be seen in the work undertaken by Hardisty Jones Associates for Swindon Borough Council and Wiltshire Council, and finalised in February 2017[1]. The approach taken is summarised briefly below.

2.1 Context

Economic forecasts were purchased from two leading forecasters, Oxford Economics (OE) and Cambridge Econometrics (CE). Forecasts were purchased for the two local authority areas of Swindon and Wiltshire. The forecasters provided both historic and forecast data from their forecasting models.

The majority of the analysis using the forecasts was undertaken in advance of the leave vote in the referendum on the UK's membership of the EU. In particular the economic forecasts, which underpin the assessment of economic futures for the area, do not take into account the potential implications of the leave vote. More than one year after the decision to leave the EU, and following the triggering of the Article 50 process, there remains a high degree of uncertainty about the impact of Brexit in both the short-term and the longer-term. Given the high degree of uncertainty, it has been agreed that there is little value in commissioning new growth forecasts, at least until there is more certainty about the Brexit process.

2.2 Baseline Forecasts

The forecasts as initially provided by the two forecasters are referred to in this report as *baseline* forecasts. The forecasters' 'baselines' draw on historic economic performance of the area as one of the determining factors. They also draw on detailed analysis of national economic potential. The forecasts are not therefore developed in a policy vacuum or absence. Whilst they are not developed with explicit reference to future local policy, the historic period on which they draw also included efforts from national, regional and local economic development stakeholders to deliver a prosperous economy. A level of economic development action is therefore inherent within the forecasts. For this reason, the term 'business as usual' can appear more helpful. However, this implies no consideration is taken of wider economic factors which will determine the economic prospects of the UK economy. This would be a misinterpretation. Nevertheless, the local baseline forecasts do not take account of any specific local policy initiatives.

In order to validate the baseline forecasts, they were tested against:

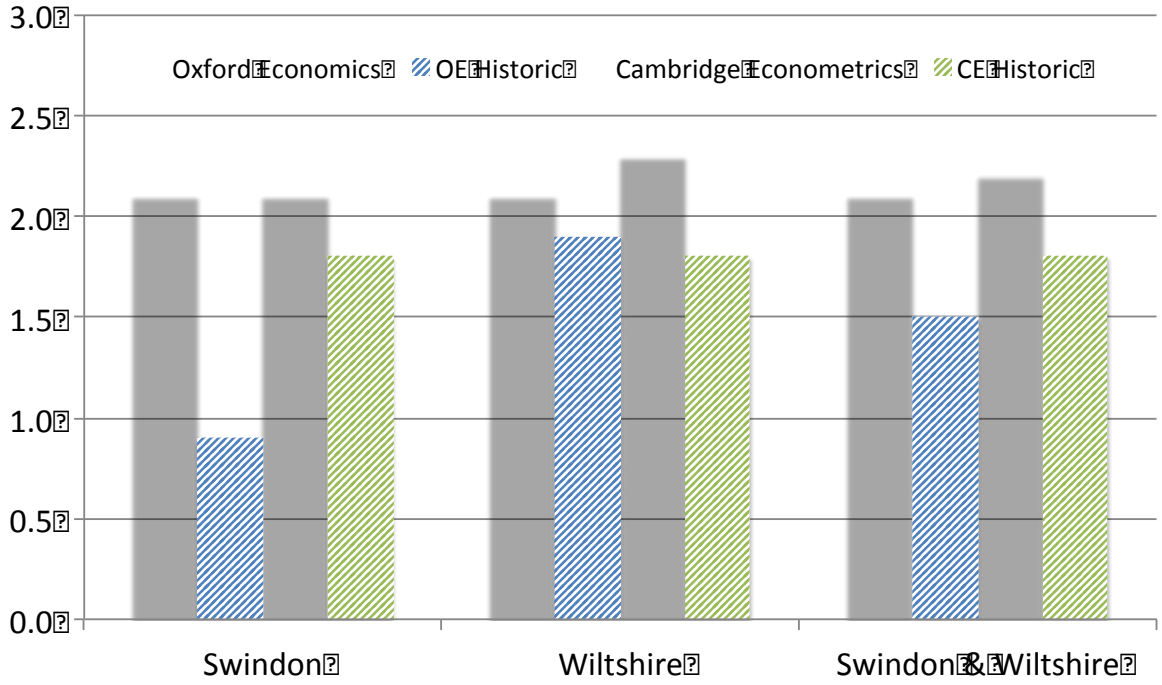
- Historic economic performance of the area
- Existing policy and strategy ambition
- Local intelligence on economic drivers and sectoral prospects
- Demographic analysis undertaken as part of the Strategic Housing Market Assessment (SHMA) as a measure of labour supply and employment need

[1] Hardisty Jones Associates for Swindon Borough Council and Wiltshire Council (February 2017) Swindon and Wiltshire Functional Economic Market Area Assessment Final Report. See also Appendix 7 – Baseline Forecast Analysis

There is some variation between the CE and OE forecasts for growth in Wiltshire, because of their different assessments of historic data, and the different models that each forecaster uses. Neither is right or wrong, but the variation between the two needs to be borne in mind.

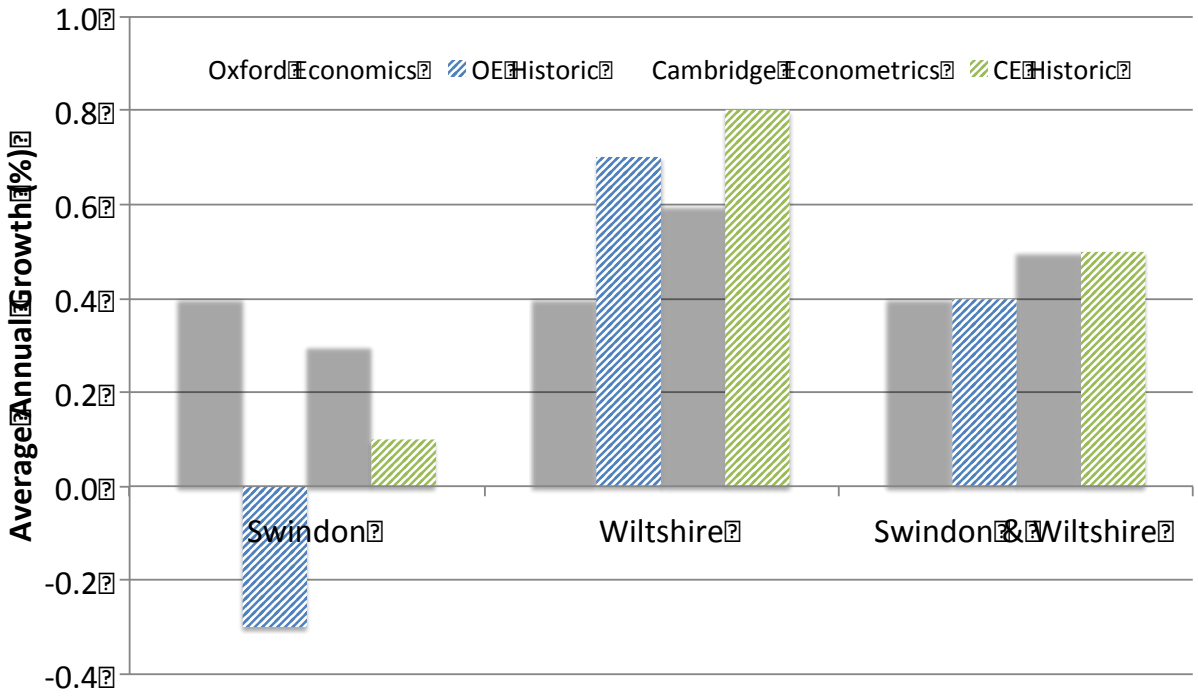
The three figures below show the variations in the assessment of historic trends, and future forecast growth between the two forecasters.

Figure 2.1: Forecast Average Annual Percentage Growth in GVA 2016-36



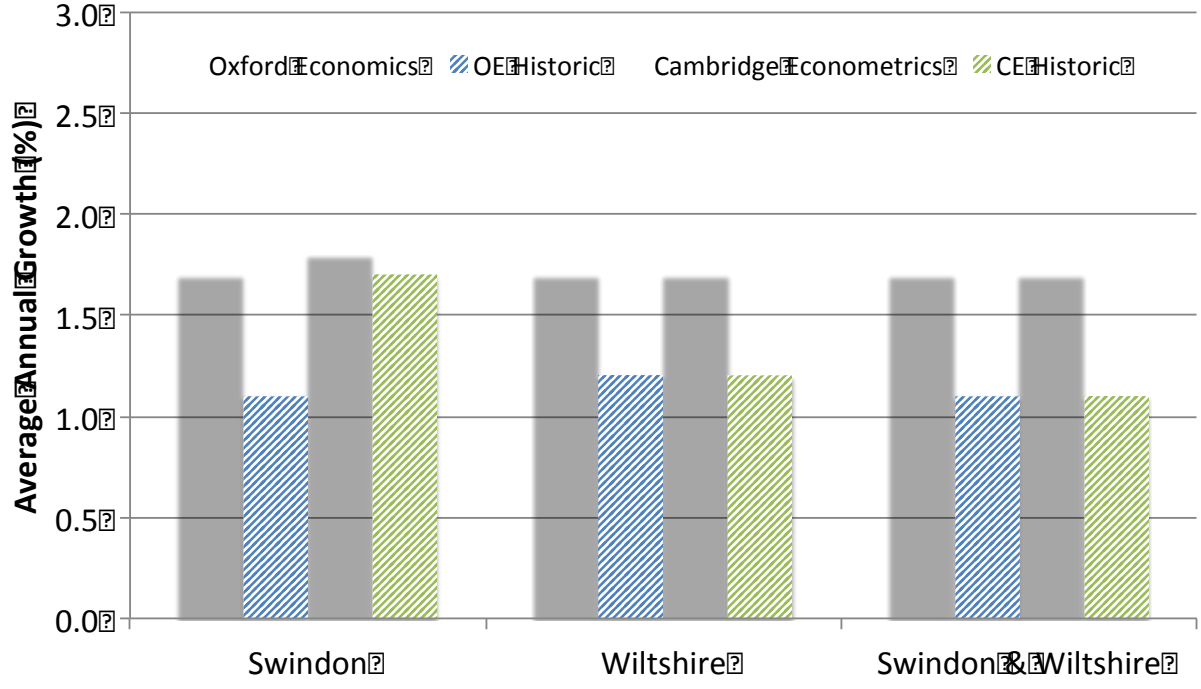
Source: HJA based on Oxford Economics and Cambridge Econometrics

Figure 2.2 – Forecast Average Annual Percentage Growth in Employment 2016-36



Source: HJA based on Oxford Economics and Cambridge Econometrics

Figure 2.3 – Forecast Average Annual Percentage Growth in Productivity 2016-36



Source: HJA based on Oxford Economics and Cambridge Econometrics

2.3 Adjustments to the Baseline Forecasts

A sector level review of the two sets of forecasts for Wiltshire was undertaken for the FEMA analysis. Stakeholder's views and other supporting evidence were used to inform a review of the forecasts for each sector, and to help decide on a hybrid scenario. The following recommendations emerged from this review for Wiltshire:

- There was stakeholder confidence in the manufacturing sector, particularly in the A350 corridor area with evidence of major live inquiries. However, there was little clear evidence on which to make a major adjustment. The upside estimate of the two forecasts was adopted for Wiltshire, with any uplift concentrated in the A350 corridor FEMA.
- Concern relating to the scale of growth forecast by CE in the food and beverage activities sector. The OE forecast was therefore adopted.
- Recognition that the scale of growth forecast in the financial services sector could be hampered by recent divestments in Salisbury. However, some replacement opportunities have been identified. The lower end of the range was therefore adopted.
- A need for a major manual adjustment to the public administration and defence sector to account for the Army Rebasing project. This will see 3,800 service personnel and their families relocating to southern Wiltshire in the 2016-19 period.

With the exception of those sectors specifically noted above the average of the two forecasts was adopted.

The Wiltshire level growth forecasts were then disaggregated to FEMA level.

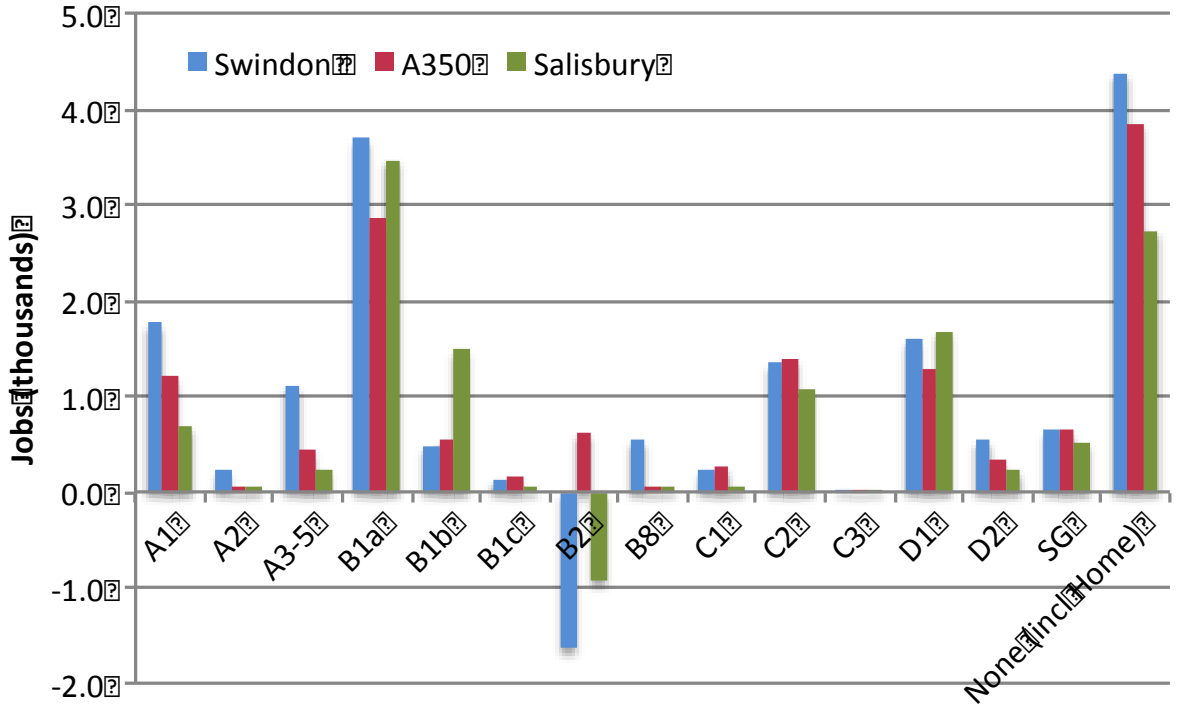
2.4 Employment Change by Sector and Use Class

The analysis above focused on employment by sector within the economy. In beginning to understand the implications for future sites and premises requirements it is helpful to consider how future employment change will be spread across Use Classes.

The sectoral employment projections have been converted to Use Classes using the conversion matrix set out in the original FEMAA report[1]. This matrix has been developed using fine-grained employment data for Wiltshire from the ONS Business Register and Employment Survey to ensure it captures the nature of sectoral strengths in the study area.

Figure 2.4, below, sets out the spread of forecast employment by Use Class in more detail. This shows that two categories dominate: growth in employment within the B1a office Use Class; and that which falls outside of all fixed property requirements. This latter category includes home working and itinerant working, as well as jobs located within client premises (e.g. cleaning and security). Some level of positive net employment growth is forecast across all Use Classes with the exception of B2 General Industrial in the Swindon and Salisbury FEMAs. This reflects the forecast decline in manufacturing employment.

Figure 2.4 – Forecast Change in Employment by Use Class 2016-36 per FEMA



Source: HJA Analysis

2.5 Sites and Premises Requirement

Slightly different methodologies are used for considering the land and floorspace implications of employment change within different Use Classes. These result from the varying availability of robust evidence to inform assumptions and the level of maturity of assessment techniques. We focus here on the demand for the B Use Classes, and full detail on all employment use classes is included in the FEMA report[1].

Figure 2.5: Assessing employment in the B Use Class

2.5.1 Net change in employment

The sectoral employment projections are converted to Use Class and then to property and land requirements using employment and development density assumptions. This provides the first element, reflecting the projected net change in the economy.

Net growth in employment within the B1a office Use Class is the largest growth within any of the Use Classes. The land requirement for this quantity of office development will depend on the type of developments coming forward. Where offices are developed within settlement centres, either as dedicated office developments or above retail uses plot ratios of 1:1 (100%) or above are achievable. In edge of centre and out-of-town business park developments a plot ratio of around 40% is more

typical, reflecting the requirement for car parking and landscaping. In reality, a mix is likely to be achieved.

Sectors contributing to change in employment in industrial sectors drive different employment space requirements in different Use Classes. In B1b Research and Development, there is a forecast growth in employment, and B1b developments would be primarily based in business park type environments with development densities of around 40%. In the B1c Light Industry Use Class, there is a lower amount of growth, and it is anticipated that B1c developments would be primarily based in business park type environments with development densities of around 40%.

For sectors using B2 Industrial sites and premises, there is a forecast decline in employment. On this basis, one might anticipate a reduced floorspace requirement. Whilst there has been employment decline in the industrial sector for some time, there continues to be demand for new premises. Issues around the need to upgrade the supply of employment premises are dealt with in the next section of this chapter. It is also worth noting:

- Whilst a business may shed some of its staff, it may not close in its entirety and it may not release any of its property holdings to the market. Due to the lumpy nature of the commercial property market, through both lease structures and freehold ownership there is not necessarily a direct relationship between employees and floorspace. The trends that hold true across the economy at large do not always apply evenly at the individual business level. There are indications of increasing space per worker measures in the industrial sector over recent years, which likely reflect the trend towards reduced employment and increasing capital intensity.
- Where a business does close, there may well be a release of either property or indeed an entire site. In some instances, these will be available for re-occupation and redevelopment through normal market mechanisms. In other cases, this may not happen within the plan period. There may be constraints upon the re-use of premises or land (such as ownership or contamination), or the site/property may be located unfavourably or be inappropriate for modern business occupiers. As a result, its continued use within the stock of employment land/property could be uncertain

B2 developments will be located in a range of industrial parks, which many vary in quality. Development densities of 40% have been assumed for B2 B8 Use Class activities.

For sectors occupying B8 Storage and Distribution, there is forecast employment growth. B8 is spread across employment uses and could include logistics park type facilities as well as smaller scale B8 within industrial and business park areas. A development density of 40% has been assumed for all storage and distribution activities.

2.5.2 Churn and replacement

The second stage then considers wider market factors, particularly the need to recognise the churn in the economy and the associated need to replace and upgrade property stocks. For example, whilst the manufacturing sector as a whole has experienced well-documented decline in its employment base, there has been a continued demand for new premises within which to operate. This demand can be driven by existing companies needing more/less space, a different location, or a different type of premises. It can also be driven by new companies in the market, which may not find the right type of property available in the right location within the market. As a result, whilst

overall a sector may be in decline (although this still applies to growing sectors too), there are changes beneath the surface that continue to drive demand. This can be a particular issue where existing stocks are ageing or where vacant sites are no longer in the locations that are suitable to modern occupiers.

With Permitted Development Rights (PDRs) now in place there is increasing pressure for redevelopment of office stocks to other uses.

HJA estimates a replacement requirement equivalent to 1% of stock per annum across all areas.

The analysis of both net additional and replacement requirements set out above do not consider whether the development activity takes place on existing employment sites (replacing or refurbishing one building with another on the same plot of land) or whether currently unoccupied land needs to be made available. The evidence and market observation suggest there will be elements of both.

For the purposes of this analysis we assume that 80% of employment development activity requires appropriate supply to be made available through allocated sites. This assumption is drawn from analysis of past completions data for Wiltshire, which indicates that around 20% of employment development took place on land previously used for employment use.

2.5.3 Choice and flexibility

The third element of the assessment builds in an allowance for choice and flexibility. This element needs to take account of offering location choice as well as choice in terms of the type of property and setting. An uplift of 10% has been applied.

2.5.4 Combined results

The forecast growth has been reviewed against historic completions of B Use Class property since 1996. Although completions vary widely from year to year, an average figure has been calculated. This is broadly consistent with the amount of employment land demand forecast to 2036.

3 Overall Demand

3.1 Updating the overall level of demand

A number of tasks have been undertaken as part of this Employment Land Review, to gather updated data on the socio-economic condition of Wiltshire, its recent growth, and drivers of future growth. These include:

- A review of all relevant socio-economic data, including an overview of recent change in Wiltshire
- A review of all recent policy documents
- Consultations with seven local property agents and 14 other stakeholders

From these tasks, we have not identified any particular factors that would lead to a change in the overall level of future land and property demand in Wiltshire, nor any factors that would lead to a change in the distribution of demand across the three Functional Economic Market Areas (FEMAs) in Wiltshire.

There is some anecdotal evidence of supressed demand in the Chippenham area, but not enough evidence to support an uplift in the total forecast level of demand in that area. The attractiveness of Chippenham has been considered in the market-led internal distribution scenario in the next section.

Malmesbury is located on the border between the M4/Swindon FEMA and the A350 FEMA. FEMAs do not have hard boundaries, but they have been drawn for the purposes of data collection and analysis. In reality, Malmesbury will play a role in both FEMAs, but for the purposes of employment and demand data analysis in this report, it is considered within the M4/Swindon FEMA.

Using the figures that were developed during the FEMAA work ensures that there is consistency between the employment growth forecasts and the population growth forecasts that underpin the FEMAA and SHMA.

3.2 Total Demand

Total demand for sites and premises in Wiltshire and in each of the three FEMAs is set out below. It is important to note that the whole M4/Swindon FEMA extends beyond the boundary of Wiltshire, and covers Swindon as well. For the purpose of this Employment Land Review, we have disaggregated the Wiltshire part of the demand from the Swindon part of the demand, and we present in this report the Wiltshire part of the total demand in that FEMA.

The Wiltshire part of the M4/Swindon FEMA demand has been disaggregated from the whole FEMA based on historic shares of employment across the FEMA. It is important to ensure that both Swindon and Wiltshire use the same method for disaggregating the whole FEMA demand to ensure that it is met.

3.2.1 Combined Demand

The figure below shows the distribution of demand for both offices and industrial sites and premises across the three FEMAs in Wiltshire. This shows that the largest part of the demand – nearly 60% - will be in the A350 FEMA. The A303/Salisbury FEMA accounts for one-third of total demand; and the M4/Swindon FEMA one-tenth.

Figure 3.1: Demand for Office and Industrial Sites and Premises

	Sq m	Ha[2]	Percentage of Total
Unitary Authority			
Wiltshire	728,400	182.0	100
FEMAs			
M4/Swindon FEMA	72,600	18.1	10
A350 FEMA	415,700	103.9	57
A303/Salisbury FEMA	240,100	60.0	33

3.2.2 Demand for Office Sites and Premises

Whilst following the same broad pattern as the overall demand (i.e. the largest amount in the A350 FEMA), the demand for office sites and premises is slightly more concentrated in the M4/Swindon FEMA and A303/Salisbury FEMA, and less concentrated in the A350 FEMA.

Figure 3.2: Demand for Office Sites and Premises

	Sq m	**Ha**Error! Bookmark not defined.	Percentage of Total
Unitary Authority			
Wiltshire	166,600	41.6	100
FEMAs			
M4/Swindon FEMA	21,000	5.2	13
A350 FEMA	83,100	20.8	50
A303/Salisbury FEMA	62,500	15.6	38

[2] N.b. Total site size is represented by a range, depending on the density of office development. However, for presentation in this report, we have shown only the top end of this range

3.2.3 Demand for Industrial Sites and Premises

The distribution of the demand for industrial sites and premises follows the same broad pattern as for overall demand (i.e. the largest amount in the A350 FEMA), but is slightly more weighted towards the A350 FEMA, and less weighted towards the other two.

Figure 3.3: Demand Industrial Sites and Premises

	Sq m	Ha	Percentage of Total
Unitary Authority			
Wiltshire	561,800	140.4	100
FEMAs			
M4/Swindon FEMA	51,700	12.9	9
A350 FEMA	332,600	83.1	59
A303/Salisbury FEMA	177,500	44.4	32

4 Internal Distribution of Demand

We have considered a number of scenarios for the possible distribution of future demand for employment land and premises within the three FEMAs in Wiltshire. These scenarios are indicative of the possible distribution of demand for new employment sites and premises, and are intended to inform discussions with Wiltshire Council about the development of the ELR. These scenarios are not recommendations on the future distribution of demand for employment sites and premises. Demand is market led and flexible within a FEMA. It is reasonable to match forecast demand and supply at the FEMA level, including allowances for choice and flexibility, but this would not be robust at the BUA level.

Six scenarios have been considered:

Internal Scenario 1 (Baseline Stock): Allocation of future demand across each of the Built Up Areas (BUAs) and rural areas according to current levels of employment (i.e. stock) in each of the BUAs and rural areas. Data on the current distribution of employment can be seen in Appendix 1. Demand for offices and industrial sites and premises are set out separately

Internal Scenario 2 (Baseline Stock & Growth): Similar to Scenario 1, starting with the already agreed level of demand for Wiltshire, but:

- That portion of future demand determined by replacement is allocated according to the current level of employment in each BUA and rural area (i.e. similar to Scenario 1) – see Appendix 1
- That portion of future demand determined by change in employment is allocated across the BUAs and rural areas according to recent employment change in each BUA and rural area, which are set out in Appendix 1

Demand for offices and industrial sites and premises are set out separately.

Internal Scenario 3 (Market Driven Scenario): Building on Scenario 2, with some manual adjustments to take account of any market-led factors identified during the consultation phase of the research, which affect the internal distribution of future demand within Wiltshire. The net total level of demand within each FEMA remains the same, although the distribution within the FEMA may be different, according to any market signals.

Internal Scenario 4 (Public Policy Scenario): Building on Scenario 2, but manual adjustments are made to take account of public policy drivers of the distribution of employment i.e. the settlement hierarchy agreed for the Wiltshire Local Plan and the Strategic Economic Plan for Swindon and Wiltshire.

Internal Scenario 5 (Housing 1): This scenario distributes some future demand according to the current distribution of employment, and some future demand according to the planned location of future housing growth:

- Building on Scenario 2, that portion of future demand determined by replacement is allocated according to the current level of employment in each BUA and rural area (i.e. similar to Scenario 1)

- That proportion of demand determined by future growth is allocated according to the location of planned future housing growth within each FEMA

Internal Scenario 6 (Housing 2): This is more straightforward than Scenario 5. All future demand is distributed within each FEMA on the same percentage distribution as the distribution of planned future housing growth.

4.1 Overview of the Scenarios

The figures below show the demand for employment land and premises distributed across each of the FEMAs in Wiltshire.

4.1.1 Combined demand: office and industrial

The two figures below show the combined demand for office and industrial sites and premises in each of the BUAs and the rural areas in Wiltshire. Of note are the following:

- There is limited variation in the distribution of sites and premises in the M4/Swindon FEMA, as there are no market indications of constrained supply and hence greater growth in any town in the future, and no principal towns which may attract more growth under a policy-led scenario
- There is some variation in the forecast demand in each of the towns between Scenario 1 (Baseline Stock) and Scenario 2 (Baseline Stock & Growth), as recent employment growth in some towns leads to them taking more growth in the future
- It is also the case that the A350 and A303/Salisbury FEMAs see a slight shift away from the rural parts of the FEMAs to the BUAs under Scenario 2, which places more emphasis on recent growth
- Chippenham sees a significant amount more future demand under Scenario 3 (Market Driven) and Scenario 4 (Public Policy)
- Trowbridge sees more demand under Scenario 4 (Public Policy)
- Salisbury sees more demand under Scenario 4 (Public Policy)

Overall, the largest variation in demand is in Chippenham, which ranges from 48,800 sq m or 12.2 Ha under Scenario 2 which takes account of the stock of employment and recent growth, up to 98,000 sq m or 24.5 Ha under Scenario 3 which allocates significantly more growth to Chippenham in response to messages about greater market desire to locate here which has been supressed by the low level of supply of sites and premises in recent years.

Figure 4.1: Total Demand for Office and Industrial Premises (sq m)

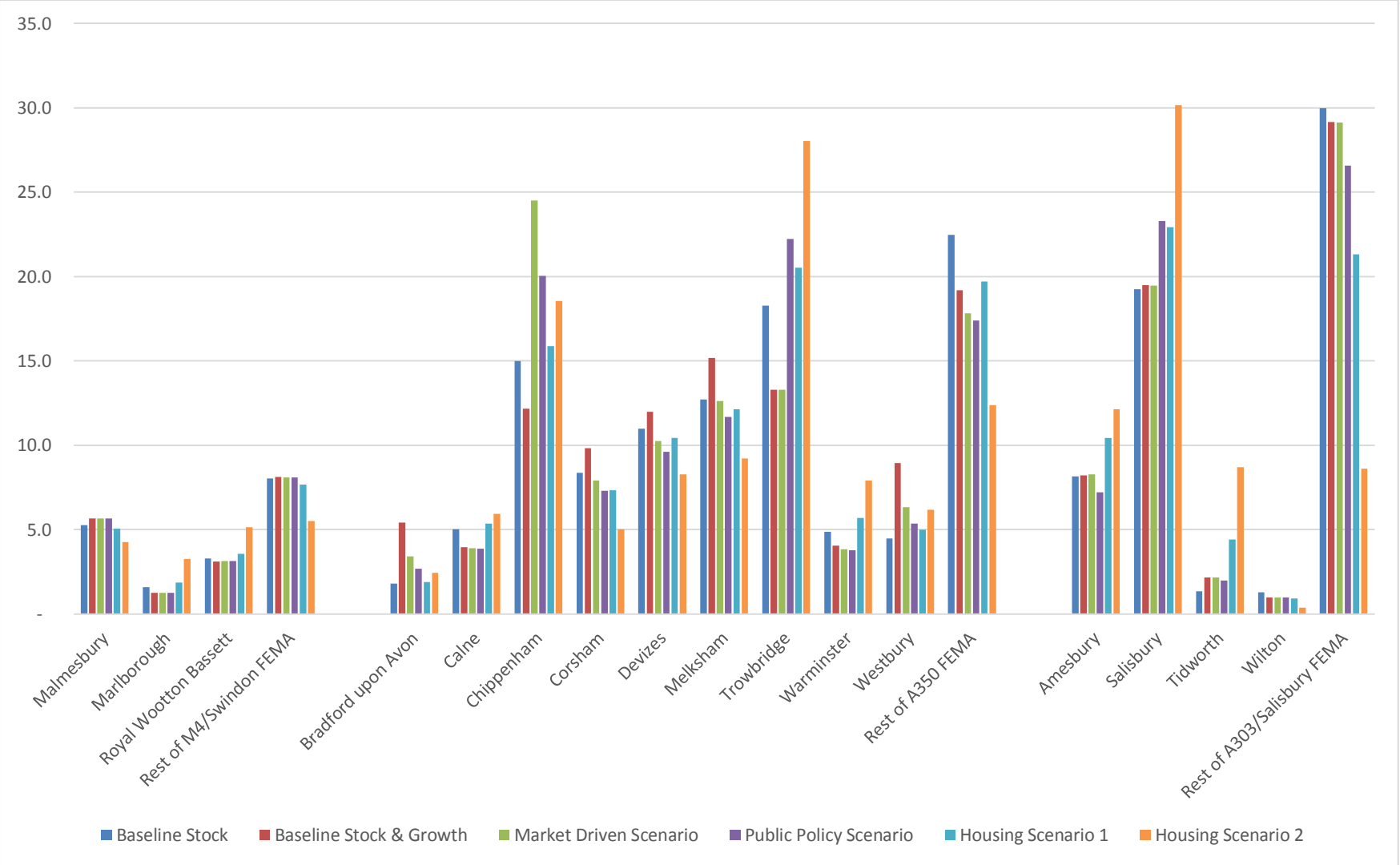


Figure 4.2: Total Demand for Office and Industrial Premises in M4/Swindon FEMA (sq m)

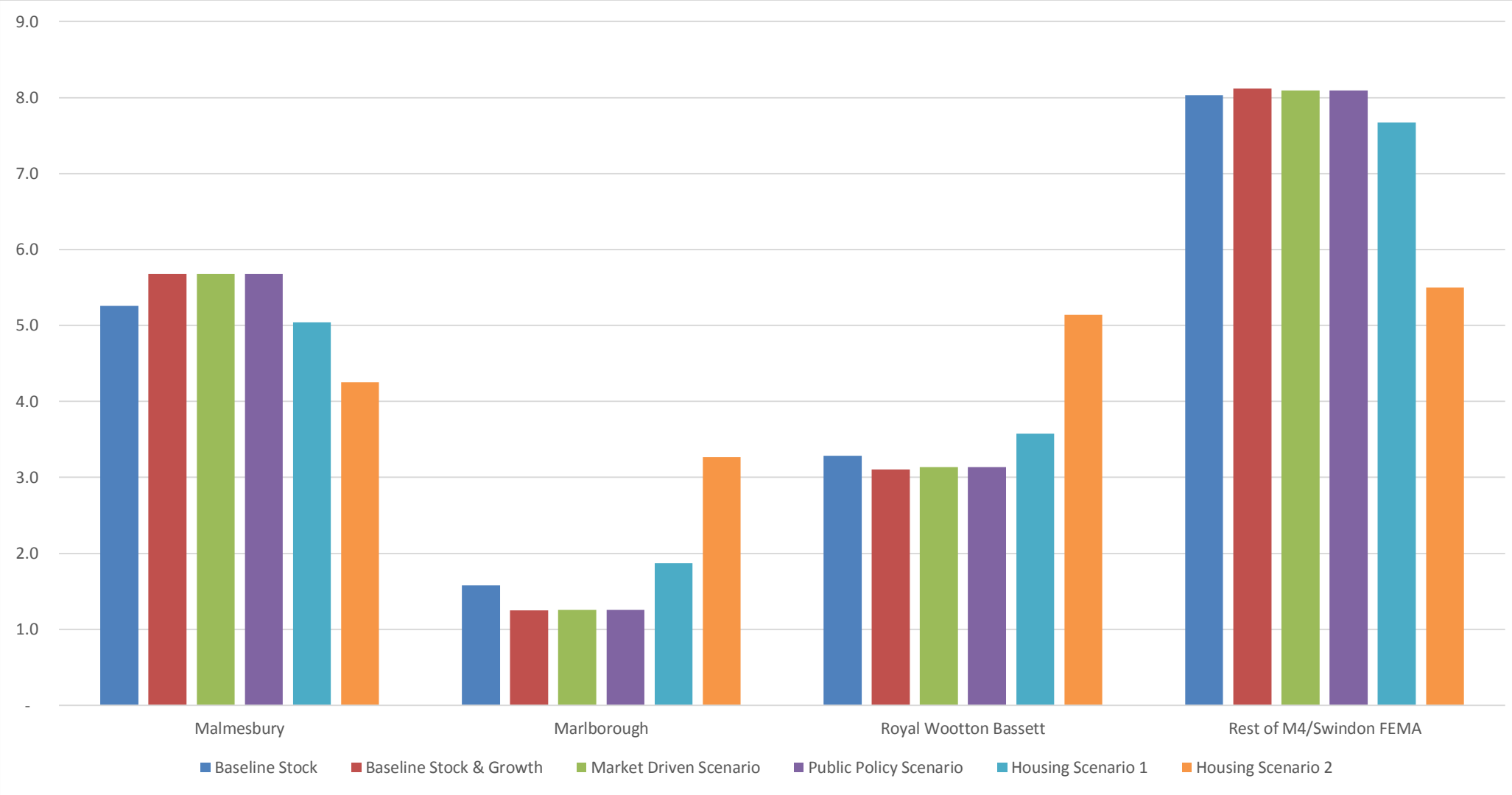


Figure 4.3: Total Demand for Office and Industrial Premises in A350 FEMA (sq m)

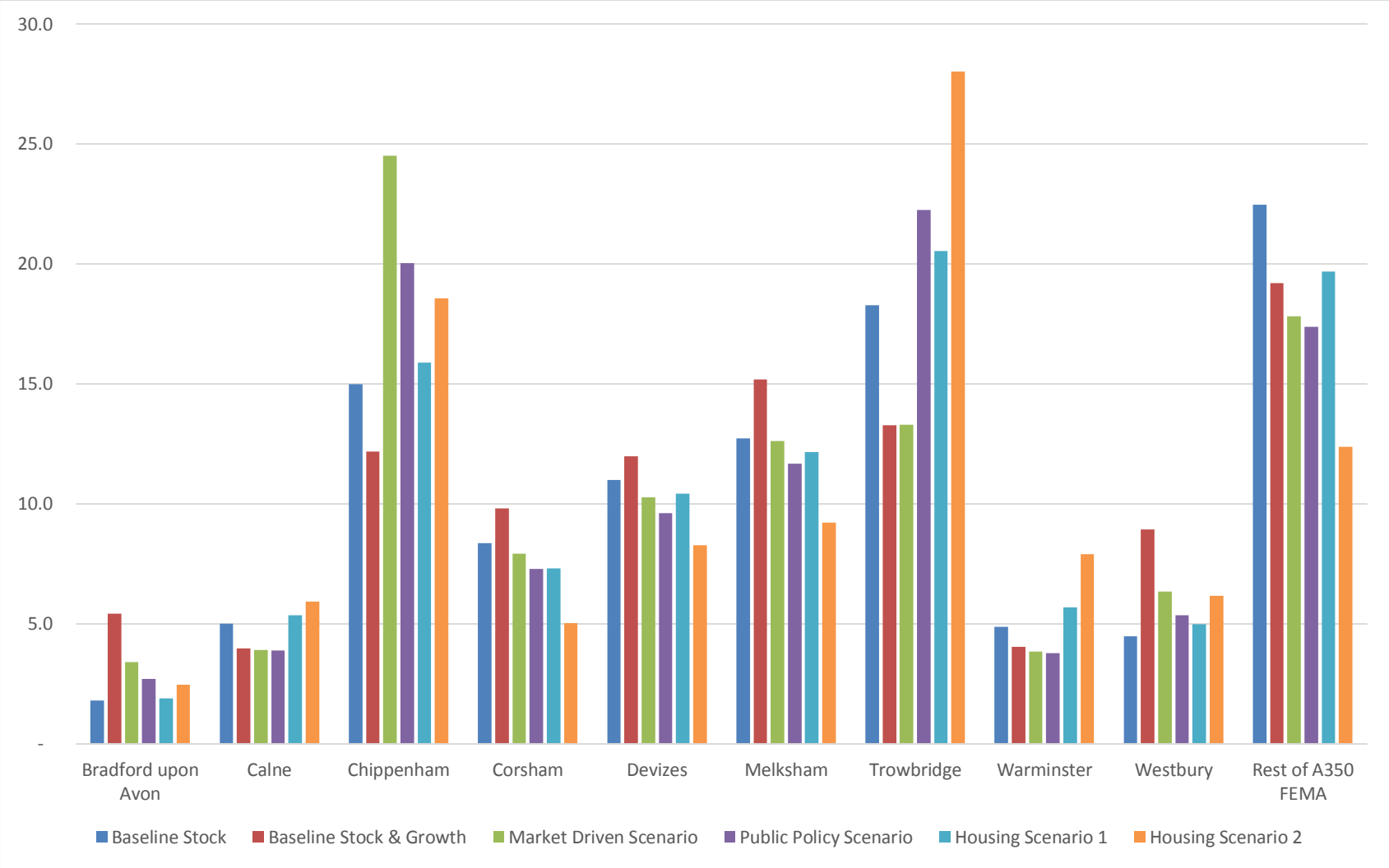


Figure 4.4: Total Demand for Office and Industrial Premises in A303/Swindon (sq m)

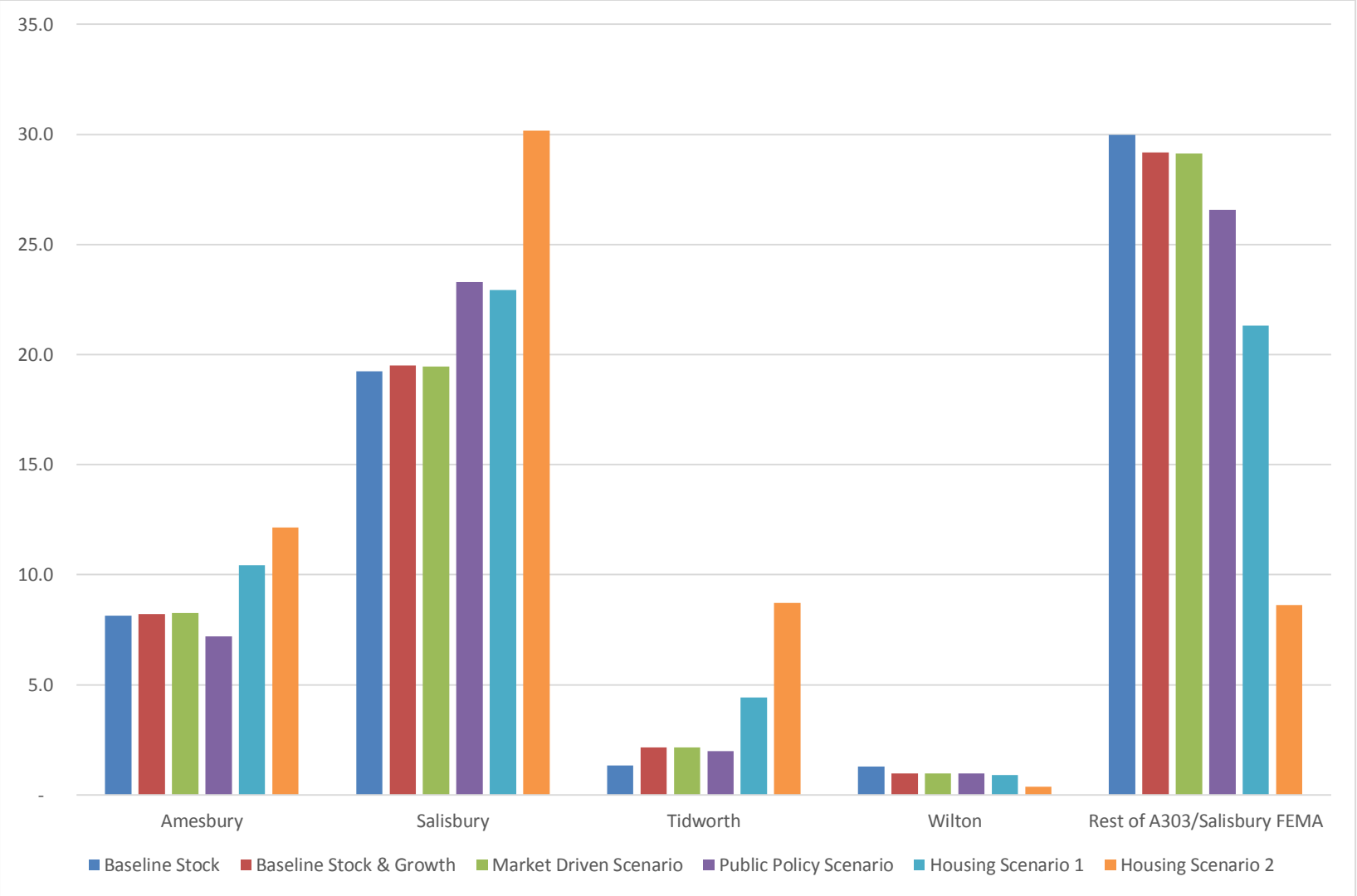


Figure 4.5: Total Demand for Office and Industrial Sites

	Scenario 1: Baseline Stock		Scenario 2: Baseline Stock & Growth		Scenario 3: Market Driven		Scenario 4: Public Policy		Scenario 5: Housing 1		Scenario 6: Housing 2	
	Sq m	Ha	Sq m	Ha	Sq m	Ha	Sq m	Ha	Sq m	Ha	Sq m	Ha
M4/Swindon FEMA	**72,700**	**18.2**	**72,700**	**18.2**	**72,700**	**18.2**	**72,700**	**18.2**	**72,700**	**18.2**	**72,700**	**18.2**
Malmesbury	21,000	5.2	22,700	5.7	22,700	5.7	22,706	5.7	20,160	5.0	17,006	4.3
Marlborough	6,300	1.6	5,000	1.2	5,000	1.3	5,032	1.3	7,480	1.9	13,067	3.3
Royal Wootton Bassett	13,100	3.3	12,500	3.1	12,500	3.1	12,533	3.1	14,315	3.6	20,561	5.1
Rest of M4/Swindon FEMA	32,100	8.0	32,400	8.1	32,400	8.1	32,366	8.1	30,682	7.7	22,002	5.5
A350 FEMA	**425,700**	**103.9**	**425,700**	**103.9**	**425,700**	**103.9**	**425,700**	**103.9**	**425,700**	**103.9**	**425,700**	**103.9**
Bradford upon Avon	7,200	1.8	21,600	5.4	13,600	3.4	10,779	2.7	7,576	1.9	9,795	2.4
Calne	20,100	5.0	16,000	4.0	15,600	3.9	15,517	3.9	21,422	5.4	23,705	5.9
Chippenham	59,900	15.0	48,800	12.2	98,100	24.5	80,181	20.0	63,560	15.9	74,242	18.6
Corsham	33,400	8.4	39,300	9.8	31,700	7.9	29,166	7.3	29,277	7.3	20,083	5.0
Devizes	44,000	11.0	47,900	12.0	41,100	10.3	38,424	9.6	41,722	10.4	33,088	8.3
Melksham	50,900	12.7	60,600	15.2	50,500	12.6	46,663	11.7	48,603	12.2	36,874	9.2
Trowbridge	73,100	18.3	53,200	13.3	53,200	13.3	88,973	22.2	82,133	20.5	112,103	28.0
Warminster	19,400	4.8	16,200	4.0	15,400	3.8	15,109	3.8	22,745	5.7	31,606	7.9
Westbury	17,900	4.5	35,600	8.9	25,300	6.3	21,404	5.4	19,923	5.0	24,692	6.2
Rest of A350 FEMA	89,900	22.5	76,600	19.2	71,300	17.48	69,521	17.4	78,776	19.7	49,549	12.4
A303/Salisbury FEMA	**240,000**	**60.0**	**240,000**	**60.0**	**240,000**	**60.0**	**240,000**	**60.0**	**240,000**	**60.0**	**240,000**	**60.0**
Amesbury	32,600	8.1	33,100	8.2	33,100	8.3	28,793	7.2	41,731	10.4	48,590	12.1
Salisbury	77,000	19.2	77,800	19.5	77,800	19.5	93,142	23.3	91,747	22.9	120,678	30.2
Tidworth	5,400	1.3	8,700	2.2	8,700	2.2	7,949	2.0	17,695	4.4	34,849	8.7
Wilton	5,200	1.3	3,900	1.0	3,900	1.0	3,921	1.0	3,650	0.9	1,487	0.4
Rest of A303/Salisbury FEMA	119,900	29.9	116,600	29.2	116,600	29.1	106,257	26.6	85,239	21.3	34,457	8.6

4.1.2 Demand for office sites and premises

Demand for offices follow a similar pattern to overall demand, as described above. Of additional note are the variation in demand in Corsham, ranging from 9,500 sq m or 2.4 Ha to 20,500 sq m or 5.1 Ha. The largest variation is between Scenario 1 based on current stock, and Scenario 2 based on current stock and recent growth. The variation is driven by the relatively large amount of growth in employment in Corsham over the period 2010 to 2015.

Figure 4.6: Demand for Office Premises (sq m)

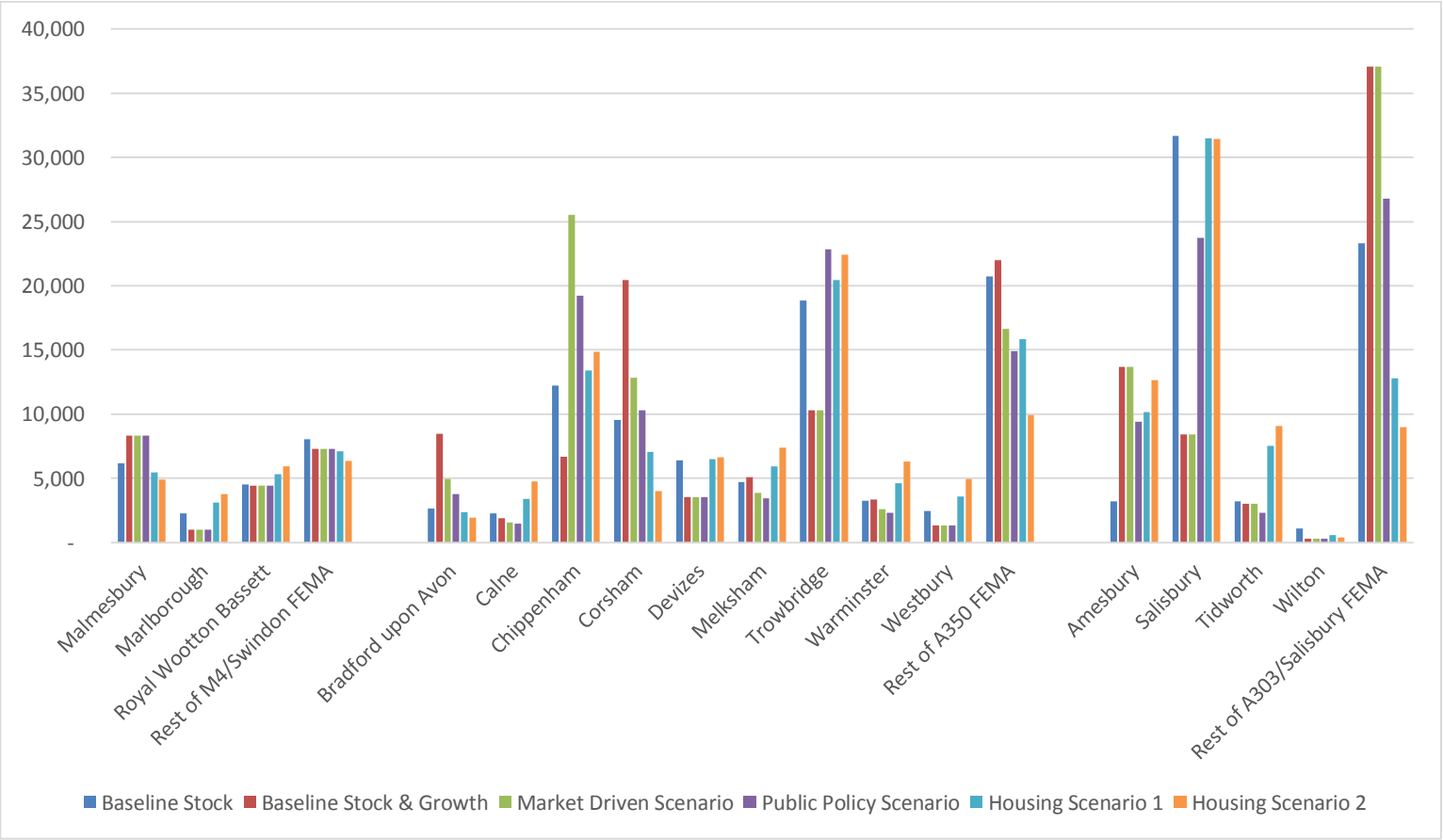


Figure 4.7: Demand for Office Sites

	Scenario 1: Baseline Stock		Scenario 2: Baseline Stock & Growth		Scenario 3: Market Driven		Scenario 4: Public Policy		Scenario 5: Housing 1		Scenario 6: Housing 2	
	Sq m	Ha	Sq m	Ha	Sq m	Ha	Sq m	Ha	Sq m	Ha	Sq m	Ha
M4/Swindon FEMA	**21,000**	**5.2**	**21,000**	**5.2**	**21,000**	**5.2**	**21,000**	**5.2**	**21,000**	**5.2**	**21,000**	**5.2**
Malmesbury	6,200	1.5	8,300	2.1	8,307	2.1	8,307	2.1	5,471	1.4	4,913	1.2
Marlborough	2,300	0.6	1,000	0.2	999	0.2	999	0.2	3,109	0.8	3,775	0.9
Royal Wootton Bassett	4,500	1.1	4,400	1.1	4,408	1.1	4,408	1.1	5,306	1.3	5,940	1.5
Rest of M4/Swindon FEMA	8,000	2.0	7,300	1.8	7,271	1.8	7,271	1.8	7,099	1.8	6,357	1.6
A350 FEMA	**83,100**	**20.8**	**83,100**	**20.8**	**83,100**	**20.8**	**83,100**	**20.8**	**83,100**	**20.8**	**83,100**	**20.8**
Bradford upon Avon	2,700	0.7	8,500	2.1	4,954	1.2	3,789	0.9	2,344	0.6	1,959	0.5
Calne	2,300	0.6	1,900	0.5	1,569	0.4	1,460	0.4	3,386	0.8	4,740	1.2
Chippenham	12,200	3.1	6,700	1.7	25,504	6.4	19,233	4.8	13,411	3.4	14,847	3.7
Corsham	9,500	2.4	20,500	5.1	12,844	3.2	10,305	2.6	7,045	1.8	4,016	1.0
Devizes	6,400	1.6	3,500	0.9	3,516	0.9	3,516	0.9	6,510	1.6	6,617	1.7
Melksham	4,700	1.2	5,100	1.3	3,847	1.0	3,428	0.9	5,927	1.5	7,374	1.8
Trowbridge	18,800	4.7	10,300	2.6	10,317	2.6	22,858	5.7	20,462	5.1	22,418	5.6
Warminster	3,300	0.8	3,400	0.8	2,574	0.6	2,309	0.6	4,640	1.2	6,321	1.6
Westbury	2,500	0.6	1,300	0.3	1,348	0.3	1,348	0.3	3,583	0.9	4,938	1.2
Rest of A350 FEMA	20,700	5.2	22,000	5.5	16,665	4.2	14,892	3.7	15,830	4.0	9,909	2.5
A303/Salisbury FEMA	**62,500**	**15.6**	**62,500**	**15.6**	**62,500**	**15.6**	**62,500**	**15.6**	**62,500**	**15.6**	**62,500**	**15.6**
Amesbury	3,200	0.8	13,700	3.4	13,690	3.4	9,413	2.4	10,145	2.5	12,654	3.2
Salisbury	31,700	7.9	8,400	2.1	8,425	2.1	23,718	5.9	31,488	7.9	31,427	7.9
Tidworth	3,200	0.8	3,000	0.8	3,020	0.8	2,299	0.6	7,518	1.9	9,075	2.3
Wilton	1,100	0.3	300	0.1	287	0.1	287	0.1	572	0.1	387	0.1
Rest of A303/Salisbury FEMA	23,300	5.8	37,100	9.3	37,094	9.3	26,799	6.7	12,794	3.2	8,973	2.2

4.1.3 Demand for industrial sites and premises

Demand for industrial sites and premises follow a similar pattern to overall demand, as described above

Figure 4.8: Demand for Industrial Premises (sq m)

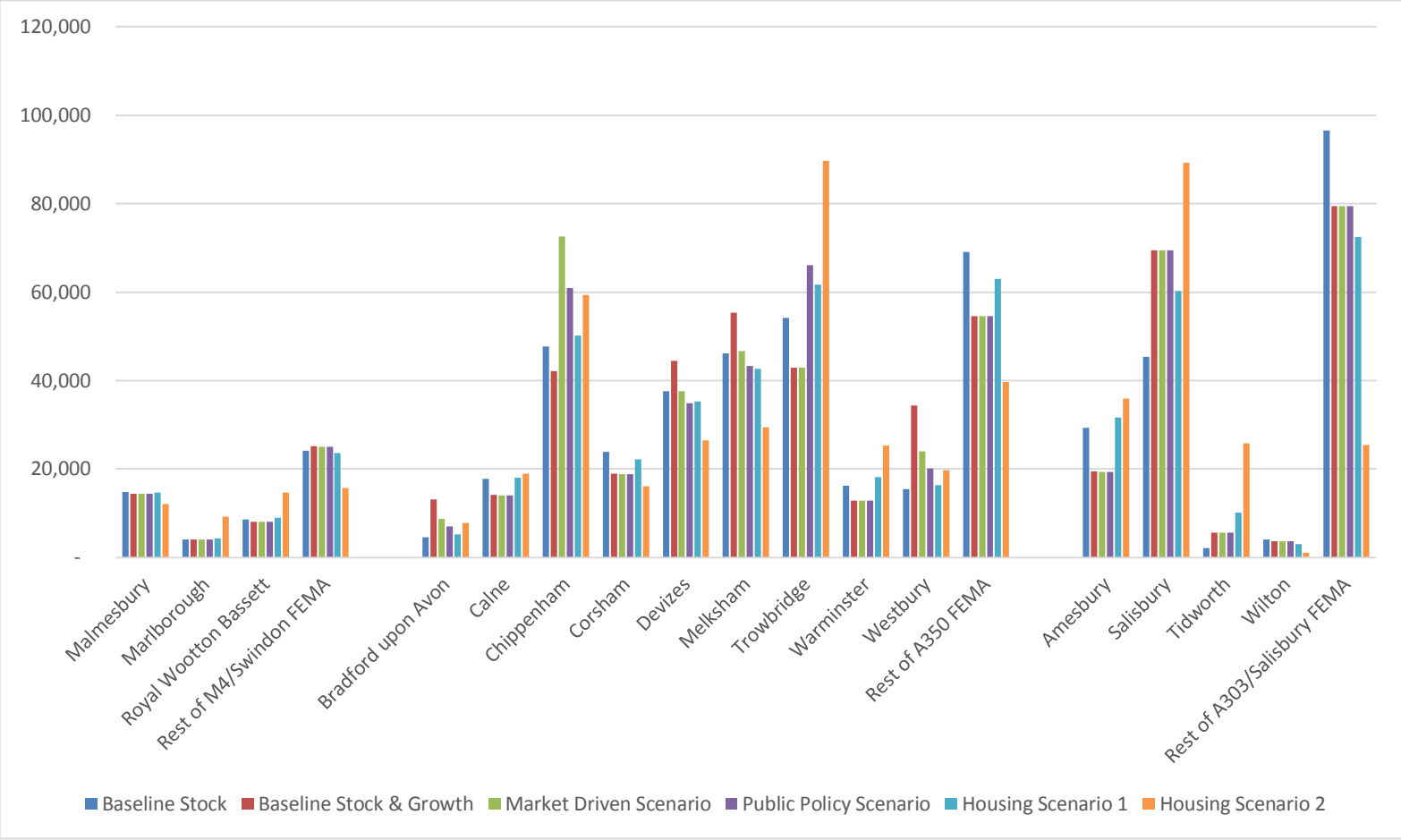


Figure 4.9: Demand for Industrial Sites

	Scenario 1: Baseline Stock		Scenario 2: Baseline Stock & Growth		Scenario 3: Market Driven		Scenario 4: Public Policy		Scenario 5: Housing 1		Scenario 6: Housing 2	
	Sq m	Ha	Sq m	Ha	Sq m	Ha	Sq m	Ha	Sq m	Ha	Sq m	Ha
M4/Swindon FEMA	**51,700**	**12.9**	**51,700**	**12.9**	**51,700**	**12.9**	**51,700**	**12.9**	**51,700**	**12.9**	**51,700**	**12.9**
Malmesbury	14,900	3.7	14,400	3.6	14,399	3.6	14,399	3.6	14,689	3.7	12,093	3.0
Marlborough	4,100	1.0	4,000	1.0	4,033	1.0	4,033	1.0	4,371	1.1	9,292	2.3
Royal Wootton Bassett	8,600	2.2	8,100	2.0	8,125	2.0	8,125	2.0	9,009	2.3	14,621	3.7
Rest of M4/Swindon FEMA	24,100	6.0	25,100	6.3	25,095	6.3	25,095	6.3	23,583	5.9	15,646	3.9
A350 FEMA	**332,600**	**83.2**	**332,600**	**83.2**	**332,600**	**83.2**	**332,600**	**83.2**	**332,600**	**83.2**	**332,600**	**83.2**
Bradford upon Avon	4,500	1.1	13,100	3.3	8,692	2.2	6,991	1.7	5,232	1.3	7,836	2.0
Calne	17,800	4.4	14,100	3.5	14,057	3.5	14,057	3.5	18,036	4.5	18,964	4.7
Chippenham	47,700	11.9	42,100	10.5	72,578	18.1	60,948	15.2	50,149	12.5	59,395	14.8
Corsham	23,900	6.0	18,900	4.7	18,861	4.7	18,861	4.7	22,232	5.6	16,067	4.0
Devizes	37,500	9.4	44,400	11.1	37,534	9.4	34,909	8.7	35,212	8.8	26,471	6.6
Melksham	46,200	11.5	55,400	13.9	46,610	11.7	43,235	10.8	42,676	10.7	29,500	7.4
Trowbridge	54,200	13.6	42,900	10.7	42,854	10.7	66,114	16.5	61,670	15.4	89,685	22.4
Warminster	16,200	4.0	12,800	3.2	12,800	3.2	12,800	3.2	18,105	4.5	25,286	6.3
Westbury	15,400	3.9	34,300	8.6	23,986	6.0	20,056	5.0	16,341	4.1	19,754	4.9
Rest of A350 FEMA	69,100	17.3	54,600	13.7	54,629	13.7	54,629	13.7	62,946	15.7	39,641	9.9
A303/Salisbury FEMA	**177,500**	**44.4**	**177,500**	**44.4**	**177,500**	**44.4**	**177,500**	**44.4**	**177,500**	**44.4**	**177,500**	**44.4**
Amesbury	29,300	7.3	19,400	4.8	19,381	4.8	19,381	4.8	31,586	7.9	35,936	9.0
Salisbury	45,300	11.3	69,400	17.4	69,424	17.4	69,424	17.4	60,259	15.1	89,251	22.3
Tidworth	2,200	0.5	5,600	1.4	5,649	1.4	5,649	1.4	10,178	2.5	25,774	6.4
Wilton	4,100	1.0	3,600	0.9	3,633	0.9	3,633	0.9	3,078	0.8	1,100	0.3
Rest of A303/Salisbury FEMA	96,600	24.1	79,500	19.9	79,458	19.9	79,458	19.9	72,445	18.1	25,484	6.4

The detail behind each of the four scenarios is described in more detail below.

4.2 Scenario 1: Baseline Stock

Future demand is distributed according to current levels of employment in each of the Built Up Areas (BUAs) and rural areas, using ONS data from the Business Register and Employment Survey (BRES) in 2015.

4.2.1 Strengths and weaknesses of this scenario

This approach to the distribution of future demand is simple, and reflects the current distribution of employment and economic activity within each FEMA.

However, as future demand follows the same pattern as current activity, it does not take account of any change in the drivers of demand.

4.2.2 Distribution of demand under this scenario

Figure 4.10: Distribution of Demand Under Scenario 1: Baseline Stock

	Sq m	**Ha**Error! Bookmark not defined.
M4/Swindon FEMA	**72,700**	**18.2**
Malmesbury	21,000	5.2
Marlborough	6,300	1.6
Royal Wootton Bassett	13,100	3.3
Rest of M4/Swindon FEMA	32,100	8.0
A350 FEMA	**425,700**	**103.9**
Bradford upon Avon	7,200	1.8
Calne	20,100	5.0
Chippenham	59,900	15.0
Corsham	33,400	8.4
Devizes	44,000	11.0
Melksham	50,900	12.7
Trowbridge	73,100	18.3
Warminster	19,400	4.8
Westbury	17,900	4.5
Rest of A350 FEMA	89,900	22.5
A303/Salisbury FEMA	**240,000**	**60.0**
Amesbury	32,600	8.1
Salisbury	77,000	19.2
Tidworth	5,400	1.3
Wilton	5,200	1.3
Rest of A303/Salisbury FEMA	119,900	29.9

Figure 4.11: Distribution of Office Demand Under Scenario 1: Baseline Stock

	Sq m	HaError! Bookmark not defined.
M4/Swindon FEMA	**21,000**	**5.2**
Malmesbury	6,200	1.5
Marlborough	2,300	0.6
Royal Wootton Bassett	4,500	1.1
Rest of M4/Swindon FEMA	8,000	2.0
A350 FEMA	**83,100**	**20.8**
Bradford upon Avon	2,700	0.7
Calne	2,300	0.6
Chippenham	12,200	3.1
Corsham	9,500	2.4
Devizes	6,400	1.6
Melksham	4,700	1.2
Trowbridge	18,800	4.7
Warminster	3,300	0.8
Westbury	2,500	0.6
Rest of A350 FEMA	20,700	5.2
A303/Salisbury FEMA	**62,500**	**15.6**
Amesbury	3,200	0.8
Salisbury	31,700	7.9
Tidworth	3,200	0.8
Wilton	1,100	0.3
Rest of A303/Salisbury FEMA	23,300	5.8

Figure 4.12: Distribution of Industrial Demand Under Scenario 1: Baseline Stock

	Sq m	Ha
M4/Swindon FEMA	**51,700**	**12.9**
Malmesbury	14,900	3.7
Marlborough	4,100	1.0
Royal Wootton Bassett	8,600	2.2
Rest of M4/Swindon FEMA	24,100	6.0
A350 FEMA	**332,600**	**83.2**
Bradford upon Avon	4,500	1.1
Calne	17,800	4.4
Chippenham	47,700	11.9
Corsham	23,900	6.0
Devizes	37,500	9.4
Melksham	46,200	11.5
Trowbridge	54,200	13.6
Warminster	16,200	4.0
Westbury	15,400	3.9
Rest of A350 FEMA	69,100	17.3
A303/Salisbury FEMA	**177,500**	**44.4**
Amesbury	29,300	7.3
Salisbury	45,300	11.3
Tidworth	2,200	0.5
Wilton	4,100	1.0
Rest of A303/Salisbury FEMA	96,600	24.1

4.3 Scenario 2: Baseline Stock & Growth

Future demand for sites and premises is allocated within each FEMA according to current levels of employment (BRES, 2015), and recent change in employment (BRES, 2010-2015). That part of demand driven by the replacement of existing stock is allocated according to the current stock of employment; and that part of the demand driven by change in employment is allocated according to the distribution of recent growth in employment.

4.3.1 Strengths and weaknesses of this scenario

The distribution of future demand under this scenario is more sophisticated than in Scenario 1, with that part of future demand driven by replacement being allocated according to the current distribution of employment (i.e. the stock of employment); and that part of future demand that is driven by growth in employment is allocated according to the distribution of recent growth in employment (i.e. between 2010 and 2015). This means that places which are attractive and have attracted recent growth will continue to see demand in the future.

However, this scenario does not allow for any constraints on the supply of sites and premises in the recent past which may have constrained the level of growth that has taken place in each BUA and rural area.

4.3.2 Distribution of demand under this scenario

Figure 4.13: Distribution of Total Demand Under Scenario 2

	Sq m	**Ha**Error! Bookmark not defined.
M4/Swindon FEMA	**72,700**	**18.2**
Malmesbury	22,700	5.7
Marlborough	5,000	1.2
Royal Wootton Bassett	12,500	3.1
Rest of M4/Swindon FEMA	32,400	8.1
A350 FEMA	**425,700**	**103.9**
Bradford upon Avon	21,600	5.4
Calne	16,000	4.0
Chippenham	48,800	12.2
Corsham	39,300	9.8
Devizes	47,900	12.0
Melksham	60,600	15.2
Trowbridge	53,200	13.3
Warminster	16,200	4.0
Westbury	35,600	8.9
Rest of A350 FEMA	76,600	19.2
A303/Salisbury FEMA	**240,000**	**60.0**
Amesbury	33,100	8.2
Salisbury	77,800	19.5
Tidworth	8,700	2.2
Wilton	3,900	1.0
Rest of A303/Salisbury FEMA	116,600	29.2

Figure 4.14: Distribution of Office Demand Under Scenario 2

	Sq m	HaError! Bookmark not defined.
M4/Swindon FEMA	**21,000**	**5.2**
Malmesbury	8,300	2.1
Marlborough	1,000	0.2
Royal Wootton Bassett	4,400	1.1
Rest of M4/Swindon FEMA	7,300	1.8
A350 FEMA	**83,100**	**20.8**
Bradford upon Avon	8,500	2.1
Calne	1,900	0.5
Chippenham	6,700	1.7
Corsham	20,500	5.1
Devizes	3,500	0.9
Melksham	5,100	1.3
Trowbridge	10,300	2.6
Warminster	3,400	0.8
Westbury	1,300	0.3
Rest of A350 FEMA	22,000	5.5
A303/Salisbury FEMA	**62,500**	**15.6**
Amesbury	13,700	3.4
Salisbury	8,400	2.1
Tidworth	3,000	0.8
Wilton	300	0.1
Rest of A303/Salisbury FEMA	37,100	9.3

Figure 4.15: Distribution of Industrial Demand Under Scenario 2

	Sq m	Ha
M4/Swindon FEMA	**51,700**	**12.9**
Malmesbury	14,400	3.6
Marlborough	4,000	1.0
Royal Wootton Bassett	8,100	2.0
Rest of M4/Swindon FEMA	25,100	6.3
A350 FEMA	**332,600**	**83.2**
Bradford upon Avon	13,100	3.3
Calne	14,100	3.5
Chippenham	42,100	10.5
Corsham	18,900	4.7
Devizes	44,400	11.1
Melksham	55,400	13.9
Trowbridge	42,900	10.7
Warminster	12,800	3.2
Westbury	34,300	8.6
Rest of A350 FEMA	54,600	13.7
A303/Salisbury FEMA	**177,500**	**44.4**
Amesbury	19,400	4.8
Salisbury	69,400	17.4
Tidworth	5,600	1.4
Wilton	3,600	0.9
Rest of A303/Salisbury FEMA	79,500	19.9

4.4 Scenario 3: Market Driven

This scenario builds on Scenario 2 and takes account of qualitative evidence on market drivers of growth. Appendix 2 sets out the key messages on market growth, and these are discussed in more detail in the separate report on the consultations undertaken to inform the ELR.

The main message emerging from the stakeholder consultations is the likely suppression of growth in Chippenham due to the constrained supply of sites and premises. The evidence suggests that employment growth that may have come to Chippenham in recent years has been displaced to other towns in the A350 FEMA. Therefore, in this scenario we have adjusted the distribution of demand in the A350 FEMA, but not in the other FEMAs. In the A350 FEMA we have:

- Distributed replacement demand in the same way as in Scenario 2 (i.e. according the stock of employment in 2015)
- Allocated more of the A350 FEMA growth-driven demand into Chippenham, and commensurately less into the rest of the FEMA. We have allocated 50% of total growth-driven demand into Chippenham, and 50% of the demand into the rest of the FEMA

The main implications of this change are:

- 18,800 sq m of additional offices in Chippenham compared to Scenario 2 (out of a FEMA total demand of 83,000 sq m
- 30,500 sq m of additional industrial demand in Chippenham compared to Scenario 2 (out of a FEMA total demand of 332,600 sq m)

4.4.1 Strengths and weaknesses of this scenario

This scenario takes account of qualitative evidence about suppressed demand due to supply constraints, and responds to market commentary.

4.4.2 Distribution of demand under this scenario

Figure 4.16: Distribution of Total Demand Under Scenario 3

	Sq m	**Ha**Error! Bookmark not defined.
M4/Swindon FEMA	**72,700**	**18.2**
Malmesbury	22,700	5.7
Marlborough	5,000	1.3
Royal Wootton Bassett	12,500	3.1
Rest of M4/Swindon FEMA	32,400	8.1
A350 FEMA	**425,700**	**103.9**
Bradford upon Avon	13,600	3.4
Calne	15,600	3.9
Chippenham	98,100	24.5
Corsham	31,700	7.9
Devizes	41,100	10.3
Melksham	50,500	12.6
Trowbridge	53,200	13.3
Warminster	15,400	3.8

Westbury	25,300	6.3
Rest of A350 FEMA	71,300	17.48
A303/Salisbury FEMA	**240,000**	**60.0**
Amesbury	33,100	8.3
Salisbury	77,800	19.5
Tidworth	8,700	2.2
Wilton	3,900	1.0
Rest of A303/Salisbury FEMA	116,600	29.1

Figure 4.17: Distribution of Office Demand Under Scenario 3

	Sq m	Ha
M4/Swindon FEMA	**21,000**	**5.2**
Malmesbury	8,307	2.1
Marlborough	999	0.2
Royal Wootton Bassett	4,408	1.1
Rest of M4/Swindon FEMA	7,271	1.8
A350 FEMA	**83,100**	**20.8**
Bradford upon Avon	4,954	1.2
Calne	1,569	0.4
Chippenham	25,504	6.4
Corsham	12,844	3.2
Devizes	3,516	0.9
Melksham	3,847	1.0
Trowbridge	10,317	2.6
Warminster	2,574	0.6
Westbury	1,348	0.3
Rest of A350 FEMA	16,665	4.2
A303/Salisbury FEMA	**62,500**	**15.6**
Amesbury	13,690	3.4
Salisbury	8,425	2.1
Tidworth	3,020	0.8
Wilton	287	0.1
Rest of A303/Salisbury FEMA	37,094	9.3

Figure 4.18: Distribution of Industrial Demand Under Scenario 3

	Sq m	Ha
M4/Swindon FEMA	**51,700**	**12.9**
Malmesbury	14,399	3.6
Marlborough	4,033	1.0
Royal Wootton Bassett	8,125	2.0
Rest of M4/Swindon FEMA	25,095	6.3
A350 FEMA	**332,600**	**83.2**
Bradford upon Avon	8,692	2.2
Calne	14,057	3.5
Chippenham	72,578	18.1
Corsham	18,861	4.7
Devizes	37,534	9.4
Melksham	46,610	11.7
Trowbridge	42,854	10.7
Warminster	12,800	3.2
Westbury	23,986	6.0
Rest of A350 FEMA	54,629	13.7
A303/Salisbury FEMA	**177,500**	**44.4**
Amesbury	19,381	4.8
Salisbury	69,424	17.4
Tidworth	5,649	1.4
Wilton	3,633	0.9
Rest of A303/Salisbury FEMA	79,458	19.9

4.5 Scenario 4: Public Policy

This scenario builds on Scenario 2 and takes account of public policy drivers of the distribution of employment and economic growth in Wiltshire. The Local Plan sets out a settlement strategy which identifies three principal settlements which will be the primary focus of development. These are Chippenham, Trowbridge and Salisbury. The strategy then sets out a list of market towns which have potential for significant development. These are the other BUAs in Wiltshire. Other places, identified as local service centres, are expected to attract modest levels of demand.

To reflect this settlement strategy we have:

- Distributed replacement demand in the same way as in Scenario 2 (i.e. according the stock of employment in 2015)
- Distributed more of the growth-driven demand into the three principal settlements, and commensurately less to the other BUAs and rural areas. We have ensured that each principal settlement has at least one-third of the total growth-driven demand in the FEMA that it is located within.

The main implications of this scenario, compared to Scenario 2, are:

- 12,500 sq m of additional office space each in Chippenham and Trowbridge, and 15,300 sq m of additional office space in Salisbury
- 18,800 sq m of additional industrial space in Chippenham and 23,200 sq m of additional industrial space in Trowbridge, but no additional industrial space in Salisbury (because it is already forecast to attract more than one-third of the total industrial demand in the A303 FEMA under Scenario 2)

The Swindon and Wiltshire Strategic Economic Plan (SEP) also sets out aspirations for future economic growth in Wiltshire. However, the aspirations set out in here are already reflected in the analysis that we have undertaken, particularly the adjustments for sectoral growth undertaken in the original FEMAA modelling. Therefore, no further adjustments are needed to accommodate the growth aspirations set out in the SEP.

4.5.1 Strengths and weaknesses of this scenario

This scenario takes account of the aspirations for distribution of future economic growth in Wiltshire, with the greater concentration of growth into the three principal settlements.

However, this is not necessarily reflective of market drivers of growth.

4.5.2 Distribution of demand under this scenario

Figure 4.19: Distribution of Total Demand Under Scenario 4

	Sq m	HaError! Bookmark not defined.
M4/Swindon FEMA	**72,700**	**18.2**
Malmesbury	22,706	5.7
Marlborough	5,032	1.3
Royal Wootton Bassett	12,533	3.1
Rest of M4/Swindon FEMA	32,366	8.1
A350 FEMA	**425,700**	**103.9**
Bradford upon Avon	10,779	2.7
Calne	15,517	3.9
Chippenham	80,181	20.0
Corsham	29,166	7.3
Devizes	38,424	9.6
Melksham	46,663	11.7
Trowbridge	88,973	22.2
Warminster	15,109	3.8
Westbury	21,404	5.4
Rest of A350 FEMA	69,521	17.4
A303/Salisbury FEMA	**240,000**	**60.0**
Amesbury	28,793	7.2
Salisbury	93,142	23.3
Tidworth	7,949	2.0
Wilton	3,921	1.0
Rest of A303/Salisbury FEMA	106,257	26.6

Figure 4.20: Distribution of Office Demand Under Scenario 4

	Sq m	Ha
M4/Swindon FEMA	**21,000**	**5.2**
Malmesbury	8,307	2.1
Marlborough	999	0.2
Royal Wootton Bassett	4,408	1.1
Rest of M4/Swindon FEMA	7,271	1.8
A350 FEMA	**83,100**	**20.8**
Bradford upon Avon	3,789	0.9
Calne	1,460	0.4
Chippenham	19,233	4.8
Corsham	10,305	2.6
Devizes	3,516	0.9
Melksham	3,428	0.9
Trowbridge	22,858	5.7
Warminster	2,309	0.6
Westbury	1,348	0.3
Rest of A350 FEMA	14,892	3.7
A303/Salisbury FEMA	**62,500**	**15.6**

	Sq m	Ha
Amesbury	9,413	2.4
Salisbury	23,718	5.9
Tidworth	2,299	0.6
Wilton	287	0.1
Rest of A303/Salisbury FEMA	26,799	6.7

Figure 4.21: Distribution of Industrial Demand Under Scenario 4

	Sq m	Ha
M4/Swindon FEMA	**51,700**	**12.9**
Malmesbury	14,399	3.6
Marlborough	4,033	1.0
Royal Wootton Bassett	8,125	2.0
Rest of M4/Swindon FEMA	25,095	6.3
A350 FEMA	**332,600**	**83.2**
Bradford upon Avon	6,991	1.7
Calne	14,057	3.5
Chippenham	60,948	15.2
Corsham	18,861	4.7
Devizes	34,909	8.7
Melksham	43,235	10.8
Trowbridge	66,114	16.5
Warminster	12,800	3.2
Westbury	20,056	5.0
Rest of A350 FEMA	54,629	13.7
A303/Salisbury FEMA	**177,500**	**44.4**
Amesbury	19,381	4.8
Salisbury	69,424	17.4
Tidworth	5,649	1.4
Wilton	3,633	0.9
Rest of A303/Salisbury FEMA	79,458	19.9

4.6 Scenario 5: Housing 1

This scenario builds on Scenario 2 and takes account of proposed housing distribution as a driver of the distribution of employment and economic growth in Wiltshire. Wiltshire Council has provided data on the proposed distribution of new housing in Wiltshire according to the Core Strategy.

To reflect the influence of new housing development, we have:

- Distributed replacement demand in the same way as in Scenario 2 (i.e. according the stock of employment in 2015)
- Distributed the growth drive demand on the same basis as the distribution of new housing developments

4.6.1 Strengths and weaknesses of this scenario

This scenario takes account of the aspirations for the distribution of future housing growth in Wiltshire, with the greater concentration of employment growth into areas where significant housing growth is planned. In theory, this should help with the sustainability of new developments, keeping new housing and new employment in close proximity, thus reducing the need to travel far to work.

However, this scenario should be treated with caution, as the location of new housing is not necessarily the best location for new employment space.

4.6.2 Distribution of demand under this scenario

Figure 4.22: Distribution of Total Demand Under Scenario 5

	Sq m	Ha
M4/Swindon FEMA	**72,700**	**18.2**
Malmesbury	20,160	5.0
Marlborough	7,480	1.9
Royal Wootton Bassett	14,315	3.6
Rest of M4/Swindon FEMA	30,682	7.7
A350 FEMA	**425,700**	**103.9**
Bradford upon Avon	7,576	1.9
Calne	21,422	5.4
Chippenham	63,560	15.9
Corsham	29,277	7.3
Devizes	41,722	10.4
Melksham	48,603	12.2
Trowbridge	82,133	20.5
Warminster	22,745	5.7
Westbury	19,923	5.0
Rest of A350 FEMA	78,776	19.7
A303/Salisbury FEMA	**240,000**	**60.0**
Amesbury	41,731	10.4
Salisbury	91,747	22.9
Tidworth	17,695	4.4
Wilton	3,650	0.9
Rest of A303/Salisbury FEMA	85,239	21.3

Figure 4.23: Distribution of Office Demand Under Scenario 5

	Sq m	Ha
M4/Swindon FEMA	**21,000**	**5.2**
Malmesbury	5,471	1.4
Marlborough	3,109	0.8
Royal Wootton Bassett	5,306	1.3
Rest of M4/Swindon FEMA	7,099	1.8
A350 FEMA	**83,100**	**20.8**
Bradford upon Avon	2,344	0.6
Calne	3,386	0.8
Chippenham	13,411	3.4
Corsham	7,045	1.8
Devizes	6,510	1.6
Melksham	5,927	1.5
Trowbridge	20,462	5.1
Warminster	4,640	1.2
Westbury	3,583	0.9
Rest of A350 FEMA	15,830	4.0
A303/Salisbury FEMA	**62,500**	**15.6**
Amesbury	10,145	2.5

	Sq m	Ha
Salisbury	31,488	7.9
Tidworth	7,518	1.9
Wilton	572	0.1
Rest of A303/Salisbury FEMA	10,145	3.2

Figure 4.24: Distribution of Industrial Demand Under Scenario 5

	Sq m	Ha
M4/Swindon FEMA	**51,700**	**12.9**
Malmesbury	14,689	3.7
Marlborough	4,371	1.1
Royal Wootton Bassett	9,009	2.3
Rest of M4/Swindon FEMA	23,583	5.9
A350 FEMA	**332,600**	**83.2**
Bradford upon Avon	5,232	1.3
Calne	18,036	4.5
Chippenham	50,149	12.5
Corsham	22,232	5.6
Devizes	35,212	8.8
Melksham	42,676	10.7
Trowbridge	61,670	15.4
Warminster	18,105	4.5
Westbury	16,341	4.1
Rest of A350 FEMA	62,946	15.7
A303/Salisbury FEMA	**177,500**	**44.4**
Amesbury	31,586	7.9
Salisbury	60,259	15.1
Tidworth	10,178	2.5
Wilton	3,078	0.8
Rest of A303/Salisbury FEMA	72,445	18.1

4.7 Scenario 6: Housing 2

This scenario is based entirely on the proposed distribution of new housing development, as set out in the Core Strategy. The location for all future employment growth across each FEMA is distributed according to the proposed location of new housing development.

The main implications of this scenario, compared to Scenario 5, are:

- Significantly more employment development in the main BUAs in Wiltshire where the residential development is proposed. In particular in Trowbridge and Salisbury
- Commensurately less employment development in the rural areas, where there is less proposed residential development in the Core Strategy

4.7.1 Strengths and weaknesses of this scenario

This scenario aligns future employment development with the proposed locations of future housing development. This should encourage sustainable development, with homes and jobs in close proximity, reducing the need to travel far to work.

However, this should be treated extremely cautiously, as locations for residential development are not necessarily the best locations for employment development. This approach does not account for the replacement of existing employment in the places where it is currently located, but drives new employment development towards growing BUAs. By co-locating residential and employment development, there is likely to be more competition for development sites, and higher value residential development may displace employment development.

4.7.2 Distribution of demand under this scenario

Figure 4.25: Distribution of Total Demand Under Scenario 6

	Sq m	**Ha**Error! Bookmark not defined.
M4/Swindon FEMA	**72,700**	**18.2**
Malmesbury	17,006	4.3
Marlborough	13,067	3.3
Royal Wootton Bassett	20,561	5.1
Rest of M4/Swindon FEMA	22,002	5.5
A350 FEMA	**425,700**	**103.9**
Bradford upon Avon	9,795	2.4
Calne	23,705	5.9
Chippenham	74,242	18.6
Corsham	20,083	5.0
Devizes	33,088	8.3
Melksham	36,874	9.2
Trowbridge	112,103	28.0
Warminster	31,606	7.9
Westbury	24,692	6.2
Rest of A350 FEMA	49,549	12.4
A303/Salisbury FEMA	**240,000**	**60.0**
Amesbury	48,590	12.1
Salisbury	120,678	30.2
Tidworth	34,849	8.7
Wilton	1,487	0.4
Rest of A303/Salisbury FEMA	34,457	8.6

Figure 4.26: Distribution of Office Demand Under Scenario 6

	Sq m	Ha
M4/Swindon FEMA	**21,000**	**5.2**
Malmesbury	4,913	1.2
Marlborough	3,775	0.9
Royal Wootton Bassett	5,940	1.5
Rest of M4/Swindon FEMA	6,357	1.6
A350 FEMA	**83,100**	**20.8**
Bradford upon Avon	1,959	0.5
Calne	4,740	1.2
Chippenham	14,847	3.7
Corsham	4,016	1.0
Devizes	6,617	1.7
Melksham	7,374	1.8
Trowbridge	22,418	5.6
Warminster	6,321	1.6
Westbury	4,938	1.2
Rest of A350 FEMA	9,909	2.5
A303/Salisbury FEMA	**62,500**	**15.6**

	Sq m	Ha
Amesbury	12,654	3.2
Salisbury	31,427	7.9
Tidworth	9,075	2.3
Wilton	387	0.1
Rest of A303/Salisbury FEMA	8,973	2.2

Figure 4.27: Distribution of Industrial Demand Under Scenario 6

	Sq m	Ha
M4/Swindon FEMA	**51,700**	**12.9**
Malmesbury	12,093	3.0
Marlborough	9,292	2.3
Royal Wootton Bassett	14,621	3.7
Rest of M4/Swindon FEMA	15,646	3.9
A350 FEMA	**332,600**	**83.2**
Bradford upon Avon	7,836	2.0
Calne	18,964	4.7
Chippenham	59,395	14.8
Corsham	16,067	4.0
Devizes	26,471	6.6
Melksham	29,500	7.4
Trowbridge	89,685	22.4
Warminster	25,286	6.3
Westbury	19,754	4.9
Rest of A350 FEMA	39,641	9.9
A303/Salisbury FEMA	**177,500**	**44.4**
Amesbury	35,936	9.0
Salisbury	89,251	22.3
Tidworth	25,774	6.4
Wilton	1,100	0.3
Rest of A303/Salisbury FEMA	25,484	6.4

Appendix 1: Current Employment and Recent Change

	2015 Total Employment	Change in Total Employment 2010 to 2015	2015 Office Employment	Change in Office Employment 2010 to 2015	2015 Industrial Employment	Change in Ind Employment 2010 to 2015
Wiltshire	197,900	+6,700	29,900	+3,600	32,900	+1,100
Swindon FEMA (Wiltshire section only)	26,700	+3,700	5,400	+1,800	3,600	+300
A350 FEMA	112,400	+2,600	16,800	+1,100	20,100	+600
A303/Salisbury FEMA	58,900	+400	7,700	+700	9,200	+300
Malmesbury	5,300	+1,600	1,600	+800	1,000	+50
Marlborough	4,600	+300	600	-10	300	+20
Royal Wootton Bassett	5,900	+800	1,200	+400	600	-90
Rest of M4/Swindon FEMA	10,900	+1000	2,100	+600	1,700	+300
Bradford upon Avon	3,100	+1,500	500	+300	300	+100
Calne	5,100	+400	500	+30	1,100	-200
Chippenham	17,300	+1,300	2,500	-100	2,900	+70
Corsham	9,200	+500	1,900	+800	1,400	-40
Devizes	10,300	-900	1,300	-300	2,300	+200
Melksham	9,400	+1,300	1,000	+100	2,800	+300
Trowbridge	19,000	-1,500	3,800	-300	3,300	-60
Warminster	6,400	+400	700	+80	1,000	-200
Westbury	4,800	+200	500	-30	900	+300
Rest of A350 FEMA	27,700	-600	4,200	+500	4,200	-30
Amesbury	5,200	+700	400	+200	1,500	-80
Salisbury	24,000	+400	3,900	-10	2,300	+200
Tidworth	2,400	+100	400	+40	100	+20
Wilton	1,200	-600	100	-40	200	+5
Rest of A303/Salisbury FEMA	26,100	-200	2,900	+500	5,000	+90

Source: HJA adapted from Business Register and Employment Survey

Appendix 2: Factors Affecting the Level and Distribution of Growth

This appendix sets out a short summary of the factors that may affect the future distribution of growth across Wiltshire. This is a summary of the key messages emerging from the full assessment of the consultation process. Full details are set out in the separate paper on the consultation process. The two tables below set out:

- Factors that may increase the level of growth in Wiltshire, or lead to increased growth in a particular location
- Factors which may constrain the level of growth, or even lead to decline in Wiltshire or in a particular location

4.8 Increased Growth

	Additional Growth Opportunity	**Impact on Overall Level of Demand**	**Impact on Distribution of Demand**
Unitary Authority			
Wiltshire	High level of residential growth increases the size of the workforce	Businesses are able to expand, so greater demand for employment land	
Wiltshire	General business expansion, which is currently constrained by lack of land, premises and workers	Businesses are able to expand, so greater demand for employment land	
Wiltshire	Mainline rail electrification reduces journey time to London	Potential for more back-office functions to locate in Chippenham	Potentially further office development in Chippenham
FEMAs			
A303	Growth in military activity stimulates additional growth throughout the local economy	Additional business growth in A303 FEMA	Additional business growth across A303 FEMA
A350	Growth in military activity stimulates additional growth throughout the local economy	Additional business growth in A350 FEMA	Additional business growth across A350 FEMA
A350	Upgrade to A350	Additional business growth in A350 FEMA. Likely in industrial and distribution sectors	Additional business growth across A350 FEMA
Towns and Rural Areas			
Chippenham	Growth opportunity if	Additional business	Additional business

	Additional Growth Opportunity	Impact on Overall Level of Demand	Impact on Distribution of Demand
	additional sites and premises can be delivered	growth in Chippenham area	growth in and around Chippenham
Corsham	Digital hub could support cyber activity related to location of Joint Forces Cyber Command	Increased demand in digital/ICT/cyber security	Additional business growth in and around Corsham
Rural A303 FEMA	Porton Down Science Park	Increased demand in life sciences and biosciences sectors	Additional business growth in Rural A303 FEMA
Rural A303 FEMA	Defence related investment at Boscombe Down	Increased demand in defence related manufacturing	Additional business growth in Rural A303 FEMA

4.9 Constraints to Growth

	Constraint to Growth	Impact on Overall Level of Demand	Impact on Distribution of Demand
Unitary Authority			
Wiltshire	Limited availability of sites and premises (especially industrial rather than offices) constrains future growth	Overall constraint to achieving growth	
Towns and Rural Areas			
Chippenham	Growth constrained by lack of sites and premises	Constraint to achieving growth in Chippenham	Constrained growth in Chippenham
Rural A303 FEMA	Loss of PHE	Loss of employment	Loss of employment in Rural A350 FEMA