

Thatcham Strategic Growth Study

Stage 2: Thatcham Present

CONTENTS

1.0 INTRODUCTION 2

Background 2

Approach..... 2

Methodology..... 3

2.0 GROWTH LOCATIONS AND CONSTRAINTS 4

Relief..... 5

Green and Blue Infrastructure 6

Policy, Heritage and Habitat Protection..... 9

Environmental Health 10

Other Constraints..... 11

Assessment Summary..... 12

3.0 MARKET REVIEW 14

The National Picture 14

Regional/Local Market Performance 15

Thatcham housing market characteristics..... 17

Conclusions..... 21

4.0 TECHNICAL WORKSHOPS 22

Conclusions..... 22

Implications for sites 23

5.0 CONCLUSIONS..... 24

Recommendations 24

Stage 3..... 26

APPENDICES

- A – Technical Workshop Summary Notes**
- B – Technical Workshop Attendance Lists**

1.0 INTRODUCTION

Background

- 1.1 West Berkshire District Council (WBDC) is in the process of preparing a Local Plan Update to ensure sufficient sites are allocated to meet housing need in the period to 2036. An Infrastructure Delivery Plan is also being prepared to ensure new development benefits from appropriate levels of infrastructure, delivered in a timely manner, to support the growth of sustainable communities. WBDC aims to ensure that development and infrastructure are viable and deliverable.
- 1.2 The Local Plan to 2026 concentrated housing expansion within the district in Newbury (with 5,400 new homes), and sought to accommodate approximately 900 homes in Thatcham during this plan period. The Housing Site Allocations Development Plan Document, in Policy HSA5, allocated a site in Lower Way for approximately 85 dwellings. A planning application is currently pending consideration for 91 dwellings. The Local Plan Update to 2036 revisits this assumption in where to concentrate expansion.
- 1.3 Housing and Economic Land Availability Assessment (HELAA) submissions made in response to WBDC's recent Call for Sites have highlighted a number of sites which are being promoted at Thatcham. WBDC is currently reviewing all sites; those of a strategic nature may warrant more detailed testing to better understand their suitability, capacity and viability. At Thatcham, WBDC's view is that this could be achieved through a three-stage process, with an emphasis on planning for the future of the settlement as a whole:
 1. Understanding historic growth and associated infrastructure/service provision to identify any under or over provision by current day standards, and to be able to relay this information to inform Stages 2 and 3;
 2. To consider the potential to deliver strategic scale growth, from the point of view of the known physical and environmental constraints of the town and the land being promoted, and having regard to their ability to deliver the measures needed to mitigate the impact of growth; and
 3. To test in more detail those areas with the potential to accommodate in the order of 3,500 dwellings and associated needs, to confirm their suitability, capacity and viability, so as to include this study in the Local Plan Evidence Base. This figure is notional and has been provided by WBDC for the purposes of testing, and does not pre-judge what is or should be delivered in Thatcham.
- 1.4 David Lock Associates together with Peter Brett Associates have been engaged to prepare this three-stage study on behalf of WBDC. This report and accompanying presentation detail our findings from Stage 2, the present state of Thatcham, including pressures and ambitions.

Approach

- 1.5 This report takes the conclusions of Stage 1, the historical growth of Thatcham and associated service provision, and uses it to aid analysis into the options available to WBDC for strategic scale growth.
- 1.6 Our Stage 2 report will undertake the following tasks:
 - **Task 3: Constraints Mapping and Information Review**
Mapping of constraints, services and land designations in GIS to build an understanding of HELAA sites and the town's context. An information review of conclusions from Stage 1 and other policies and documents will also inform an understanding of suitability of growth across sites.

-
- **Task 4: Market review**
A review of the broad residential market situation in Thatcham in terms of achieving residential development in Thatcham based on published data sources.
 - **Tasks 5 & 6: Technical Workshops**
Invited workshops that provide an opportunity to understand officer and stakeholder positions, enabling confirmation and learning about the constraints and opportunities associated with strategic scale growth at Thatcham.
- 1.7 The outputs from Stage 2, detailed in this report, are a summary of the work undertaken and recommendations for the most promising options to explore for the future stage 3 of this study.

Methodology

- 1.7 This stage of the research study has been based on a combination of desk-based research, publicly available GIS and market data, and a full-day technical workshop involving a wide range of stakeholders in Thatcham. A site visit to the town and some of the submitted sites also assisted the team in their conclusions. Feedback from WBDC has also been incorporated into the findings.
- 1.8 This stage 2 report acts as part of the evidence base for WBDC's Local Plan Update to 2036. It does not seek to pre-judge that report and does not recommend whether to include specific sites in the Local Plan site allocations, only to provide evidence on which the Councils' decisions may be based.

2.0 GROWTH LOCATIONS AND CONSTRAINTS

2.1 The Local Plan update process began with a Call for Sites, using the West Berkshire HMA HELAA Methodology.

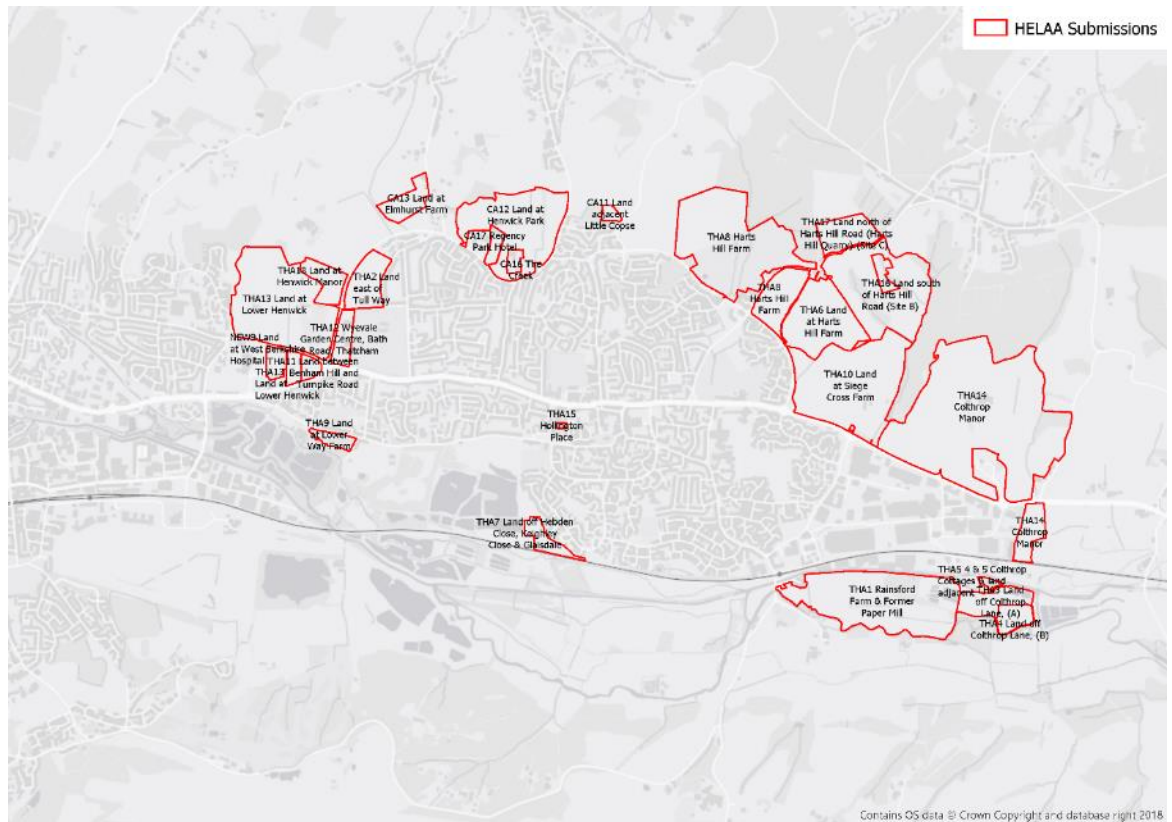


Figure 1: HELAA Submissions around Thatcham (December 2018)

2.2 A number of sites surrounding Thatcham have been submitted. Most sites are located to the north of Thatcham.

| Ref | Site Name | Current Use | Area (ha) | Potential Dwellings (as submitted by promoter) |
|-------|---|-------------------------------|-----------|--|
| THA7 | Land off Hebden Close, Keighley Close & Glaisdale | Agriculture | 3.44 | 103 at 30dph |
| THA1 | Rainsford Farm & Former Paper Mill | Former paper mill, aggregates | 36.2 | 950 |
| THA2 | Land east of Tull Way | Open land | 7.49 | 45 & 30 affordable |
| THA4 | Land off Colthrop Lane, (B) | Grassland (landfill) | 3.38 | None as for employment (B2 and B8) |
| THA3 | Land off Colthrop Lane, (A) | Sand and gravel processing | 9.67 | None as for employment (B2 and B8) |
| THA5 | 4 & 5 Colthrop Cottages & land adjacent | Residential | 0.67 | 7-30 |
| THA6 | Land at Harts Hill Farm | Agriculture | 16.34 | 200 |
| THA9 | Land at Lower Way Farm | Vacant | 2.87 | 36 |
| THA10 | Land at Siege Cross Farm | Agriculture | 35.7 | 500 |
| THA11 | Land between Benham Hill and Turpike Road | Agriculture | 1.62 | None as for employment |
| THA12 | Wyevale Garden Centre, Bath Road, Thatcham | Garden centre | 3.7 | Not outlined (site also promoted for employment and rationalised garden centre). |
| THA13 | Land at Lower Henwick | Agriculture | 36.5 | Not outlined (site also promoted for commercial use) |

| | | | | |
|-------|--|---------------------|-------|---------------|
| THA14 | Colthrop Manor | Agriculture | 81.2 | 500-800 |
| THA8 | Harts Hill Farm | Agriculture | 44.5 | 591 |
| THA15 | Hollington Place | Residential | 0.2 | Not outlined |
| THA16 | Land south of Harts Hill Road (Site B) | Agriculture | 30.59 | 500 |
| THA17 | Land north of Harts Hill Road (Harts Hill Quarry) (Site C) | Agriculture, quarry | 6.03 | 150 |
| THA18 | Land at Henwick Manor | Agriculture | 4.09 | Not outlined. |
| CA11 | Land adjacent Little Copse | | 0.8 | 21 |
| CA12 | Land at Henwick Park | Agriculture | 31 | 225 |
| CA16 | The Creek | Residential | 1.7 | Not outlined |
| CA13 | Land at Elmhurst Farm | Equestrian | 4.26 | 86 |
| CA17 | Regency Park Hotel | Hotel | 2.1 | Not outlined |
| NEW9 | Land at West Berkshire Hospital | Grassland | 3.7 | 104 |

Table 1: Sites near Thattham submitted to HELAA (December 2018)

Relief

2.3 As highlighted in Stage 1, Thattham’s historical development is affected by the surrounding relief. Apart from a small amount of development towards Henwick Park and Cold Ash, the town has remained in the valley bottom.

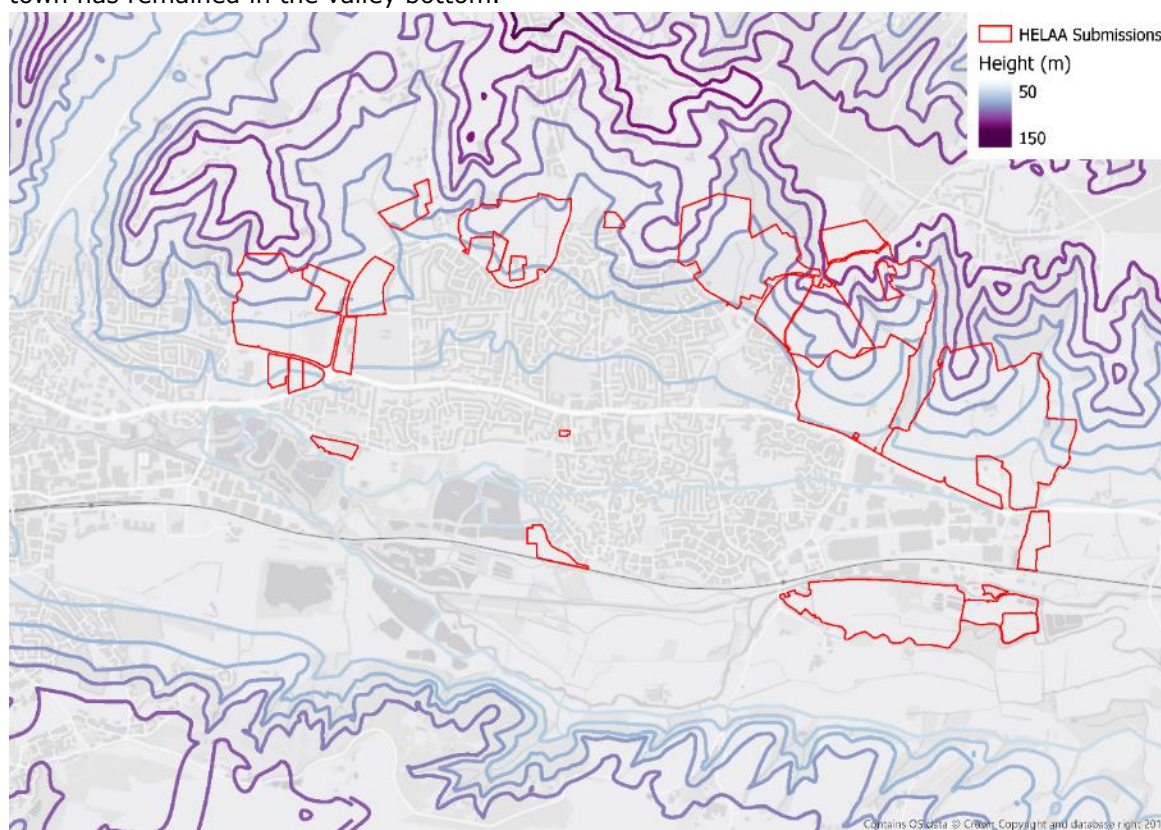


Figure 2: Topographic map of Thattham

2.4 The only submitted sites affected by relief constraints are located to the north of the town, particularly those to the north-east of Thattham.

2.5 Gradients in the north east sites are in the range of 5-12.5%, with most areas below 8%. Local conditions on the sides of valleys occasionally present higher gradients. This change in

levels should not present a significant barrier to development but will limit capacity and will be a major consideration in highways layout.

- 2.6 The change in relief will affect the form of development on the slopes. This could present an opportunity to pursue different design approaches in an area with a markedly different underlying character. It could also impose constraints in the form of:
- Visibility of built form up the slopes limiting heights of buildings and densities of development form;
 - Integration of drainage features;
 - More complex and expensive engineering.
- 2.7 The rising nature of the NE sites could present opportunities for Thatcham-wide leisure provision and improvements of access to the land and views to the south.
- 2.8 Sites to the north of Thatcham also have a rise in gradient, but the gradients are lower (3-5%).
- 2.9 To the west and north-west of Thatcham the submitted land at Lower Henwick (THA13) does rise at its northern point, and it would face similar issues to the north-east Thatcham sites.
- 2.10 In summary, the relief surrounding Thatcham is a factor to consider when evaluating sites and applications, especially in the context of the AONB's proximity. Each site will need to be subject to the usual statutory process of Landscape Character and Visual Impact Assessments. It does present a design challenge for the character of development, how it relates to the town and to the character of the area, and could affect the ultimate capacity delivered by strategic expansion onto sites with gradients. Visibility from the existing town could affect the acceptability of proposals to nearby residents.

Green and Blue Infrastructure

- 2.11 Stage 1 of this study identified the significant green and blue assets that the town possesses, and that could stand to benefit from or inform the design of development.
- 2.12 The major green and blue infrastructure constraints faced by sites submitted to the HELAA fall into the following categories:
1. Kennet flood plain
 2. Presence of surface water and surface drainage
- Ancient woodland assets, SSSI, SAC and Local Wildlife Sites are discussed in a later section on Policy, Heritage and Wildlife Protection.

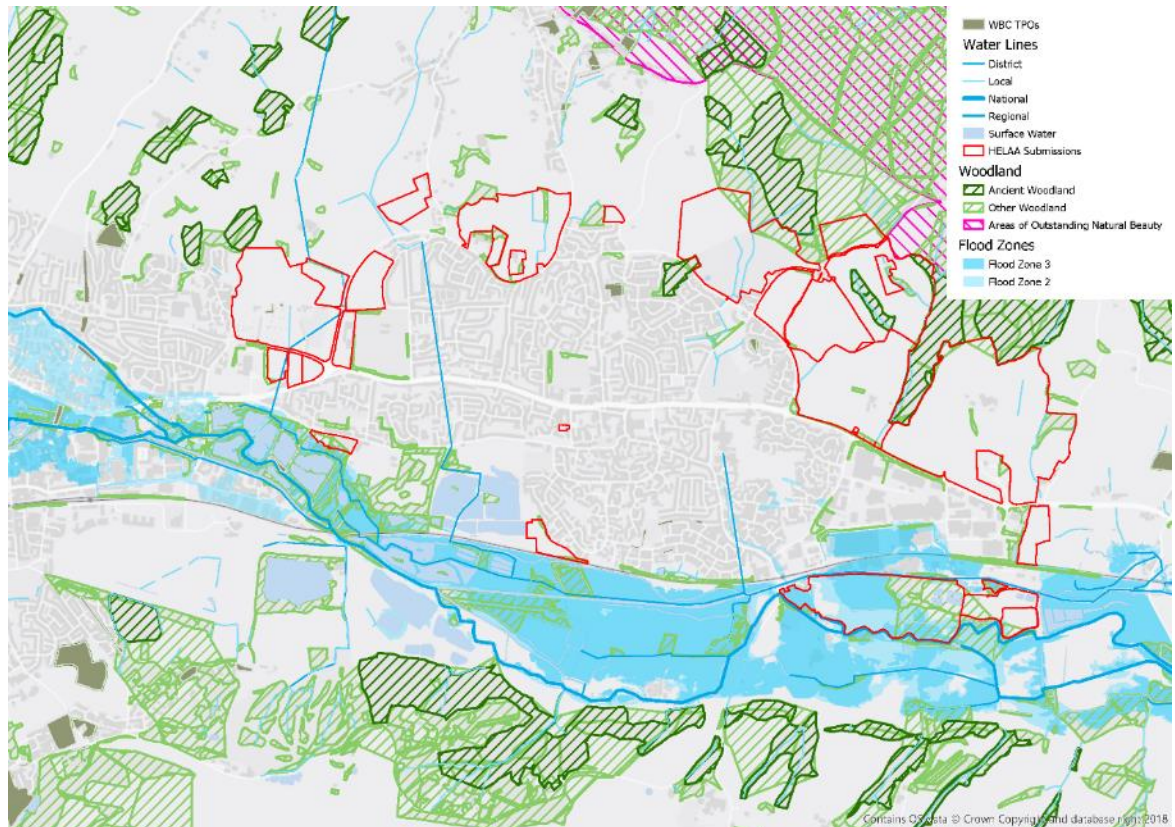


Figure 3: Main blue and green infrastructure present around Thatcham

1: Kennet flood plain

2.13 To the south of the town a wide flood plain exists between the railway line and the rise in landscape just south of the River Kennet. The majority of this land is in Flood Zones 2 and 3, zone 3 being land assessed as having a greater than 1 in 100 annual probability of river flooding.

2.14 Submitted sites to the south-east of Thatcham fall into this flood plain area, and contain significant amounts of Flood Zones 2 and 3 definition. Development in this area would be difficult and would require complex, expensive engineering to reduce the risk to an acceptable level. Such engineering solutions typically require expensive long-term maintenance, and have a mixed record in preventing flooding events. Development options that avoid these areas should be explored in preference.

2: Presence of surface water and surface drainage

2.15 Land to the north and north-east of Thatcham is criss-crossed by a series of small streams and rivers, draining the slopes and the downs to the north.

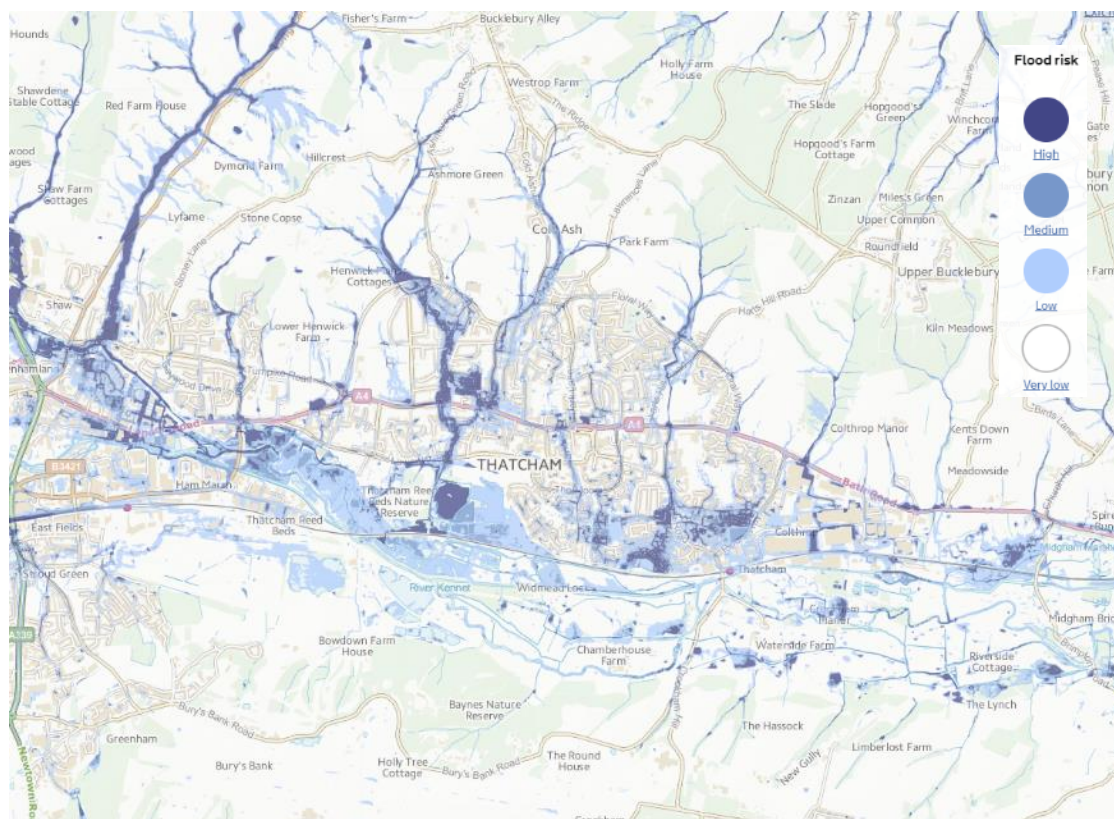


Figure 4: Surface water flood risk map (Environment Agency)

- 2.16 This slope was the source of the water that created the 2007 surface water flooding event, as discussed in more detail during the Stage 1 report.
- 2.17 Development to the north of the town would require detailed consideration of the drainage issues, to avoid having a detrimental effect on the flood resilience of the town below.
- 2.18 A more detailed analysis of the drainage issues to the north of the town is contained in the appendix on Technical Workshops.
- 2.19 In overview, these issues affect the larger sites submitted to the north of the town. The channels that are present offer an opportunity to integrate SUDS into the design of any new scheme in a more imaginative and positive manner than could otherwise be possible.
- 2.20 Significant detailed work would be required to assess the drainage issues, but with modern SUDS design working with the landscape any mitigation measures need not be large and have complex, expensive engineering. WBDC has an SPD in place governing the use of SuDS within the district, which recommends natural drainage systems and slowing the flow of water rather than complex engineering.

3: Ancient woodland assets

- 2.21 To the north-east of the town there exist areas of ancient woodland, some integrated into wider mature woodland assets.
- 2.22 Most of these pockets of woodland exist at some distance from the current settlement boundary. Typically they follow the lines of water channels and associated valley topography.

- 2.23 These pockets of woodland, and the wider mature woodland assets, should not be a bar to development, but will have an impact on the ultimate capacity of a strategic site and design approaches to integrate and enhance these assets.

Policy, Heritage and Habitat Protection

- 2.24 Thatcham’s context has a number of policy designations that aim to conserve the natural and historic environment.

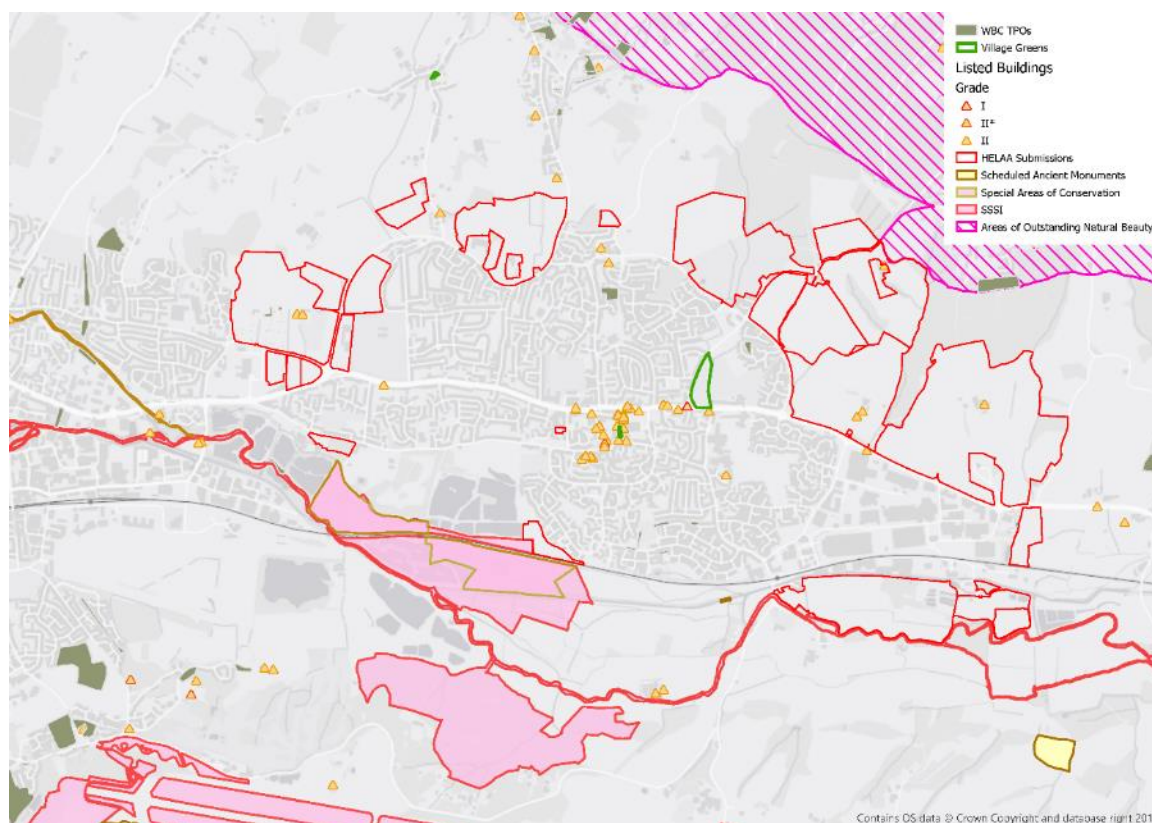


Figure 5: Primary policy, heritage and habitat protection constraints to development around Thatcham

- 2.25 The North Wessex Downs Area of Outstanding Natural Beauty (AONB) boundary comes near the town to the north-east. Although no sites are proposed within the AONB, the NE sites are nearby and will need to consider the setting of the AONB in their proposals.
- 2.26 A site visit to NE Thatcham confirmed that views of the AONB ridgeline from the southern escarpment would be affected by development up the slopes, and would act as a development constraint.
- 2.27 A full landscape assessment would need to be made to confirm sensitive locations and view corridors. Additionally it may be appropriate to limit development to further away from the AONB boundary. Some of the submitted sites (sites B&C at Harts Hill Farm, THA16, THA17) extend to the AONB boundary. This consideration would affect the ultimate capacity of those sites.
- 2.28 To the south of the town an interconnected network of protected landscapes exist, as part of the Berkshire Living Landscape area. An increase in population would affect the number of people using Greenham Common (which is mostly SSSI) for recreation, dogwalking and the weekly Parkrun event. In addition to this general effect of population growth, the following sites would have a direct effect on the Living Landscape environments:

- Those to the south-east of the town next to the River Kennet SSSI
 - Land at Lower Way Farm (THA9), adjacent to the Thatcham Nature Reserve SSSI and Special Area of Conservation.
 - Land off Hebden Close (THA7), adjacent to the Thatcham Nature Reserve SSSI, and the Nature Discovery Centre area
- 2.29 Because of the proximity of these sites to areas of conservation, development capacity will be significantly reduced from what would be possible for typical sites of these sizes, leading to potential issues of viability.
- 2.30 More broadly, all development sites in Thatcham could have a detrimental effect on this network of landscapes due to the drainage patterns of the town. Natural drainage drops into the River Kennet, and piped sewage goes to the combined Newbury & Thatcham sewage works, upstream of the SSSI as it passes Thatcham. Any development could place greater strain on these assets, and mitigation for runoff pollution will be a factor in development.
- 2.31 Statutory historic environment protection in Thatcham comprises listed buildings, and the Thatcham conservation area in the centre of the town.
- 2.32 Listed buildings are present on submitted sites in Lower Henwick (THA13), Elmhurst Farm (CA13), and the group of sites in NE Thatcham. These buildings are all farm buildings in rural settings.
- 2.33 The present rural setting of the Listed Buildings will have an impact on the type of development that can surround them. As such they present another constraint on the ultimate capacity of the site.
- 2.34 The conservation area in the centre of Thatcham will not be directly affected by any of the submitted sites. However the additional population added to the town will present opportunities and challenges for the town centre as the population uses the services. Renewal of the built environment could accomplish conservation goals, but additional traffic could be detrimental.
- 2.35 Additional protection and existing studies of the historic environment character were discussed in more detail during the Technical Workshops, later in this study.

Ecology Assessments

- 2.36 As part of the HELAA assessment process, the Thames Valley Ecological Research Centre (TVERC) performed an assessment of the ecological impact of development on submitted sites. Each site was assessed for:
- Protected or priority species reported on site or nearby and likely to be affected
 - Protected or priority habitats on site or nearby
- 2.37 TVERC's assessment was desk-based and the Centre did not undertake additional surveys. Such surveys would only be undertaken later in the Local Plan process.

2.38 XXX

Environmental Health

- 2.39 Two main constraints on development in connection to environmental health are air quality and noise.

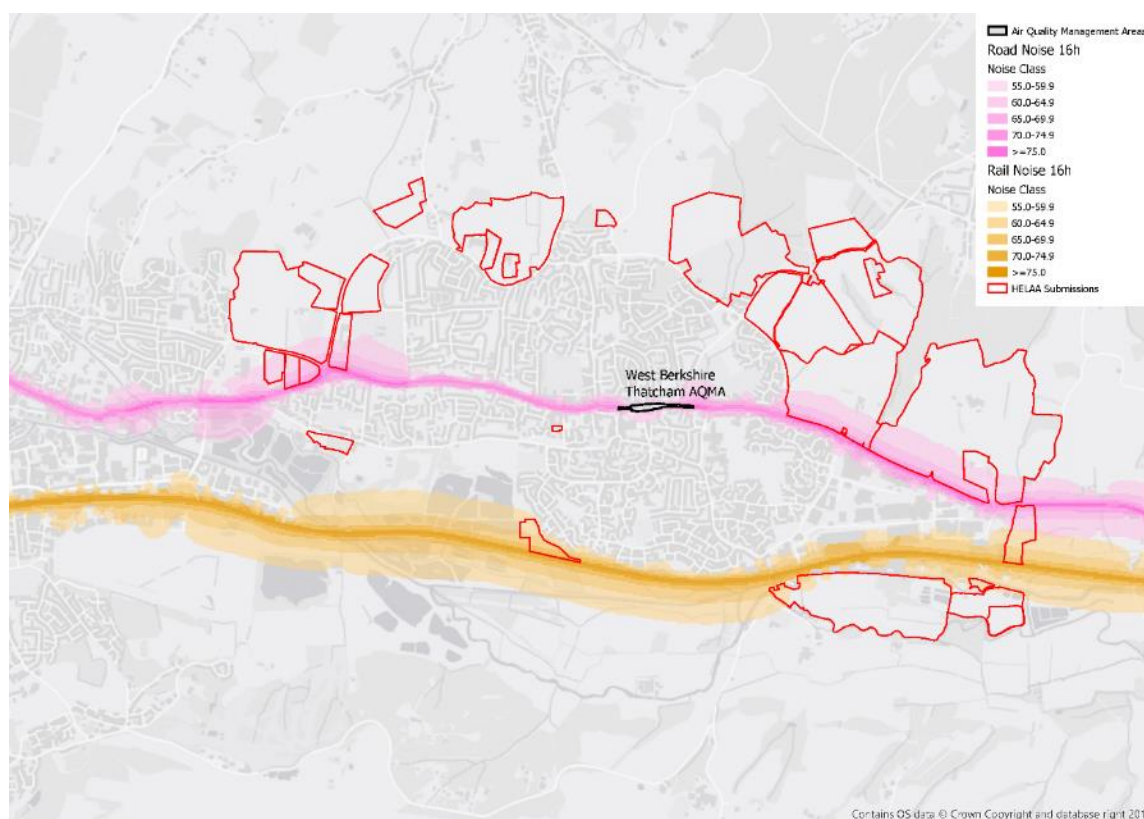


Figure 6: Air pollution and noise in the Thatcham area

- 2.40 Thatcham has an Air Quality Management Area (AQMA) designated in the centre of the town. The AQMA has been designated due to the concentration of NO_x (Nitrogen Dioxide), so is particularly sensitive to car movements. Although this is not part or adjacent to any of the sites, development on any of the sites could have a detrimental impact on the air quality in this area. Development towards the eastern end of the town could result in a significant rise in vehicle traffic through to Newbury, and this should be considered as part of their ultimate deliverable capacity.
- 2.41 Noise sources are primarily from transport, both road and rail. There is little industrial noise as the Colthrop Mill industrial estate does not host heavy industry.
- 2.42 Road noise from the A4 would need to be addressed on sites that are adjacent to the A4, such as Colthrop Manor (THA14) and Lower Henwick (THA13). There is also noise generated by the Floral Way distributor road to the north of the town, as observed on a site visit.
- 2.43 Rail noise does not affect many of the sites submitted to the HELAA, but does affect Land off Hebden Close (THA7) and the Rainsford Farm collection of sites (THA1, THA3, THA4, THA5). However it is likely that this noise level will be reduced somewhat by the electrification of the line has been recently completed. Mitigation measures on-site could reduce capacity.

Other Constraints

- 2.44 The issue of conserving strategic landscape gaps towards Newbury and Cold Ash has an effect on sites that are considered suitable.
- 2.45 As detailed in Stage 1, it is generally agreed amongst stakeholders, and supported by WBDC policy ADPP3, that Thatcham should aim to build a greater element of self-containment in service provision and sense of place. Development within the strategic landscape gap towards Newbury would appear to compromise this ambition.

- 2.46 Cold Ash village has also sought in the past to conserve its distinct nature from Thatcham in terms of development character, and the recent designation of a Neighbourhood Area looks to strengthen this distinction. Sites looking to expand towards Cold Ash will have to take this into account when estimating capacity on their land and consider incorporating strategic landscape gaps.
- 2.47 Scale of site is another factor that needs to be considered as part of this study. Sites selected as part of such development should be:
- Large enough to support significant residential capacity at deliverable densities
 - In a location that supports sustainable development
 - Joined up or located in a way that supports a critical density of development for additional services or facilities (e.g. schools) that would be needed in an expanded Thatcham
- 2.48 The sites submitted around Thatcham fall into a variety of categories:
- Small, isolated sites such as Land at Elmhurst Farm (CA13) or Land off Hebden Close (THA7)
 - Larger sites that could support development such as Land at Lower Henwick (THA13) and Land at Henwick Park (CA12), but could only be a smaller part of a full strategic allocation and would not be joined up
 - Large and joined up sites such as the sites to the NE of Thatcham.

Assessment Summary

- 2.49 To summarise the constraints discussion detailed above, each site submitted to the HELAA by December 2018 has been scored in the categories Topography, Green and Blue, Heritage & Conservation, Environmental Health and Other.
- 2.50 Constraints that would lead to reductions in capacity were scored 1. Minor issues that could affect development were scored 3. Major issues that would be hard to work around viably were scored 10.
- 2.51 The site constraint points were totalled and plotted on a map. Sites were then grouped into categories quantitatively assessed to be more or less suitable for development across the range of criteria. It should be noted that this assessment is only one of the factors that informs the overall conclusions of this report, which will also be informed by the outputs of the technical workshops.

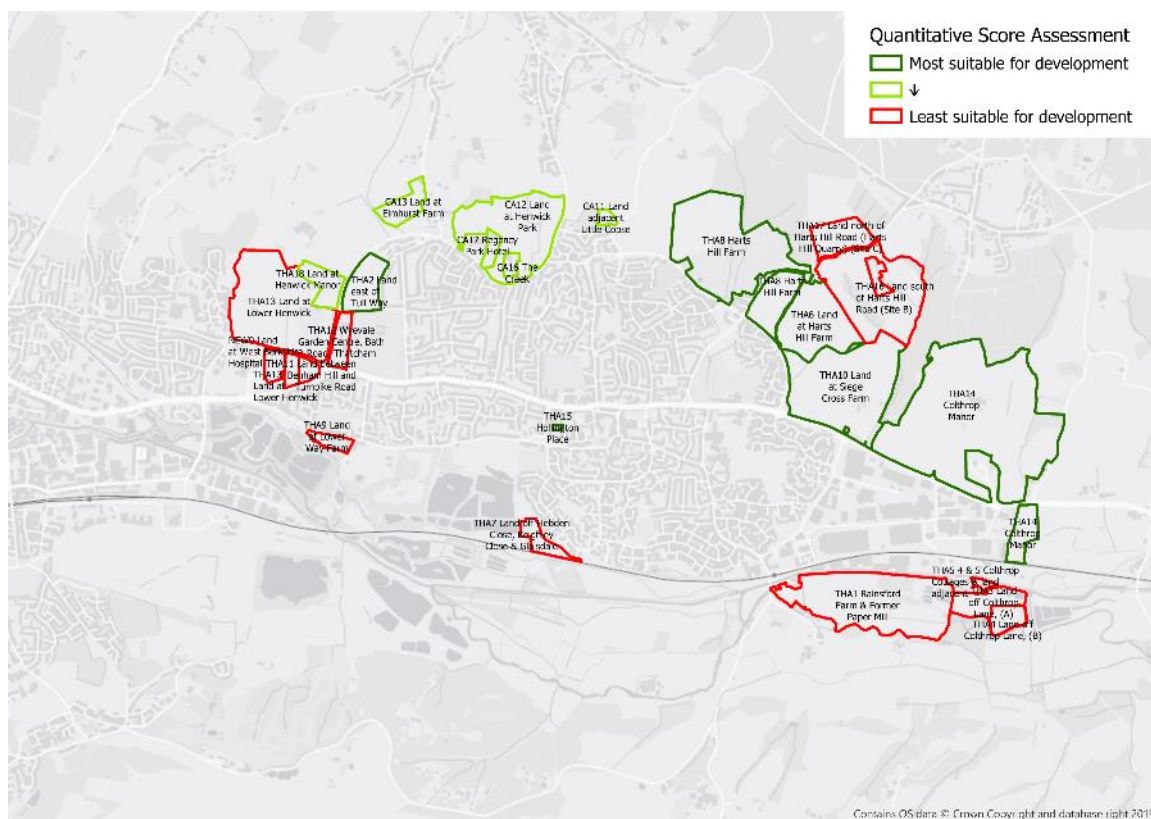


Figure 7: Quantitative assessment of constraints and desirability of development

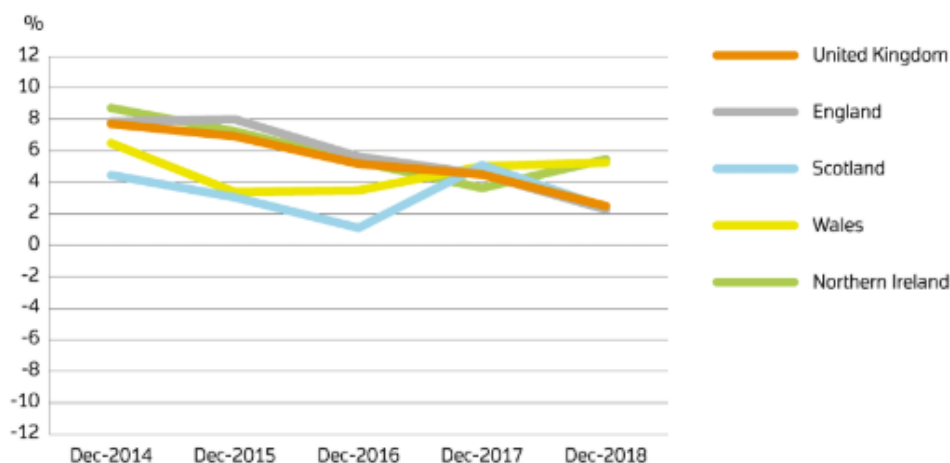
- 2.52 This assessment was then sense-checked with a qualitative assessment of the most appropriate directions of growth based on constraints.
- 2.53 Sites to the south are broadly affected by the flood zones and natural conservation policies covering the landscape.
- 2.54 Sites to the west are broadly affected by the spatial strategy for the District and the requirement to maintain and enhance the identity of Thatcham, separate to that of Newbury and the surrounding rural settlements, in accordance with policy ADPP3.
- 2.55 Small sites are affected by the complexities of delivering them as part of a strategic development, although in many cases they may have a role in delivering additional housing as allocated sites.
- 2.56 Sites to the north and north-east appear most favourable for development, with those to the north-east benefitting from contiguity and the relatively large gap to the AONB. Sites nearest the AONB are constrained by topography and ecology.
- 2.57 Land East of Tull Way (THA2) is in the process of being built out and should be excluded from this study.

3.0 MARKET REVIEW

- 3.1 A residential market conditions review for Thatcham within the West Berkshire Housing Market Area (HMA) has been undertaken.
- 3.2 This review aims to establish if the residential housing market has the potential to support growth, and the outlook for different housing types.

The National Picture

- 3.3 The latest statistical update from the HM Land Registry reports the following trends in the national housing market:
- 3.4 Headlines
 - The average price of a property in the UK was £230,776
 - The annual price change for a property in the UK was 2.5%
 - The monthly price change for a property in the UK was 0.2%
- 3.5 UK house prices grew by 2.5% in the year to December 2018, down from 2.7% in the year to November 2018. This is the lowest annual growth for the UK since July 2013, when house prices increased by 2.3%.
- 3.6 Housing activity in southern England was muted due to uncertainty, with transactions postponed until after the EU withdrawal. The demand for new build houses remained stronger outside London, in part due to housebuilders offering more incentive to finalise sales.
- 3.7 The Royal Institution of Chartered Surveyors’ (RICS) UK Residential Market Survey for December 2018 reported that new buyer enquiries fell for the fifth month in a row. This fall in demand was accompanied by a lack of fresh stock coming into the market as the survey’s indicator on new instructions remained in negative territory for the sixth report in a row.



| Country and government office region | Price | Monthly change | Annual change |
|--------------------------------------|----------|----------------|---------------|
| England | £247,886 | 0.3% | 2.3% |
| South East | £324,729 | 0.1% | 1.2% |

Figure 8: Annual price change for UK over past five years (HM Land Registry)

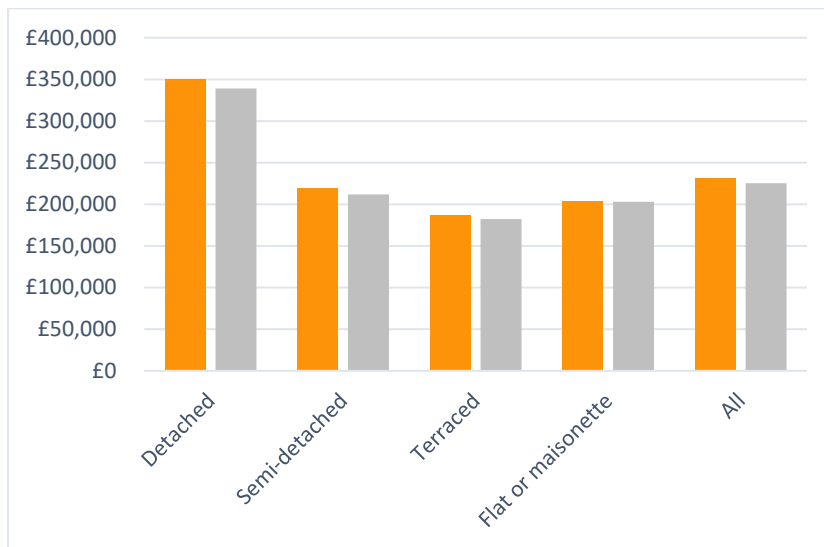


Figure 9: Average house price by property type UK (HM Land Registry)

3.8 Sales volumes for October 2018 in England stood at 66,599 units, down 13.56% compared to October 2017 (77,047 units). The estimate for October 2018 is calculated based on around 85% of the final registered transactions. The number of property transactions for October 2018 will increase as more transactions are incorporated into the index.

3.9 The data for October 2018, indicates sales volumes have decreased when compared with the same time last year and have fallen below the October 2016 levels.

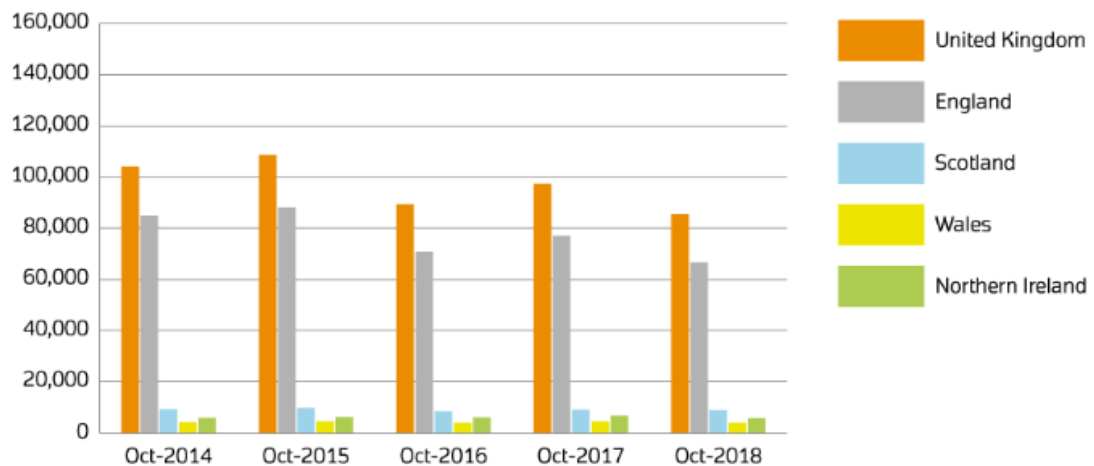


Figure 10: Sales volumes for October 2014 to 2018 by country (HM Land Registry)

Regional/Local Market Performance

3.10 The average price for property in South East England stood at £324,729 in December 2018. Average prices for property in the Berkshire authorities varies according to location with Wokingham, West Berkshire and Windsor and Maidenhead all recording prices in excess of the regional levels.



Figure 11: Average house prices West Berkshire c/f adjacent boroughs Dec 2018 (HM Land Registry)

3.11 Average house prices in West Berkshire are above the national average and in the mid-range for the Berkshire authorities as a whole, reinforcing the potential for residential development to play a part in underpinning long term growth in the towns of West Berkshire.

3.12 The Land Registry provides the following market activity data within the borough for the year to date (December 2018).

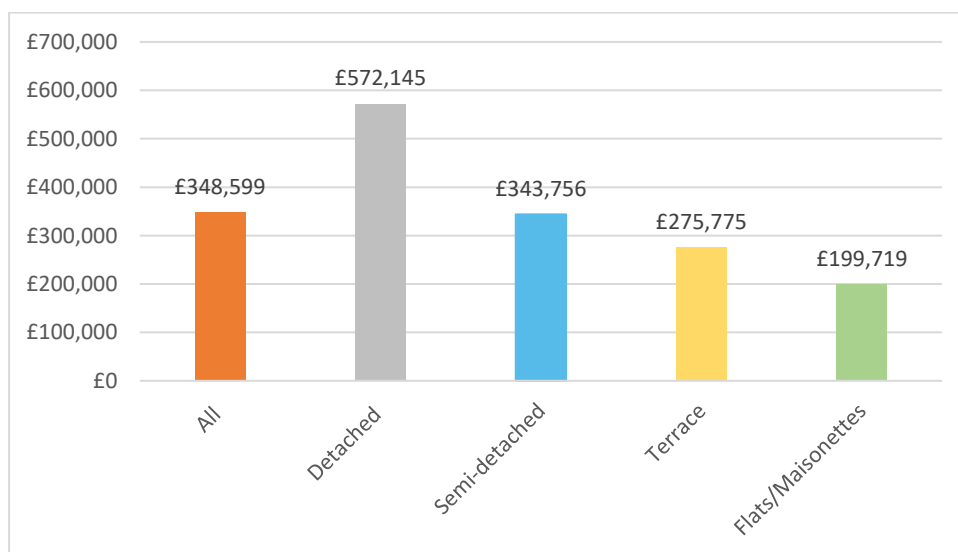


Figure 12: Average house prices by type for West Berkshire Dec 2018 (HM Land Registry)

3.13 As expected the average price of detached housing is significantly higher than for other house types (£223,546 above the average price). At the other end of the scale, flats and maisonettes are markedly cheaper than other housing types (a discount of £148,880 on all housing types). This reflects the fact that this type of property is generally smaller (i.e. 1 or 2 bedroom) and often sold subject to affordable housing discounts. Average prices for semi-detached match the borough average with terraced accommodation below the borough average. As indicated above House prices in West Berkshire are significantly higher than for England and the UK. The average price for different property types highlights that affordability remains a critical issue.

Thatcham housing market characteristics

3.14 The following figure indicates that the average price paid for a house in Thatcham during the last 12 months was £377,415, an annual reduction of 4.5%. This is higher than the borough average of £348,599.

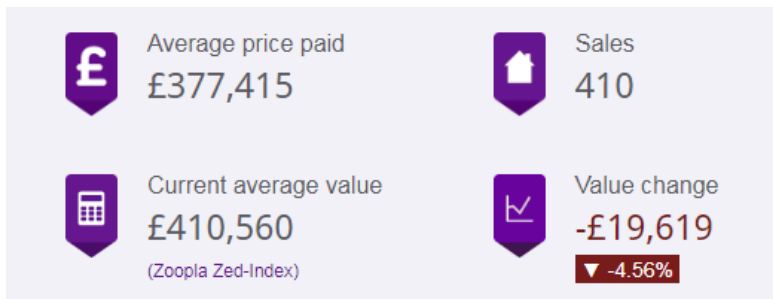


Figure 13: Market Activity for Thatcham last 12 months (Zoopla)

3.15 The data for Thatcham indicates that house price and value trends are similar to those in the rest of the borough. However, the heat map at Figure 14 indicates that values in Thatcham are towards the cooler end of the market in common with other locations on the A4 axis such as Newbury (RG14 on the graphs). Housing near to the M4 corridor and in the surrounding villages demonstrates medium to high range values. Berkshire as a whole shows higher values but this is skewed by high values closer to London.

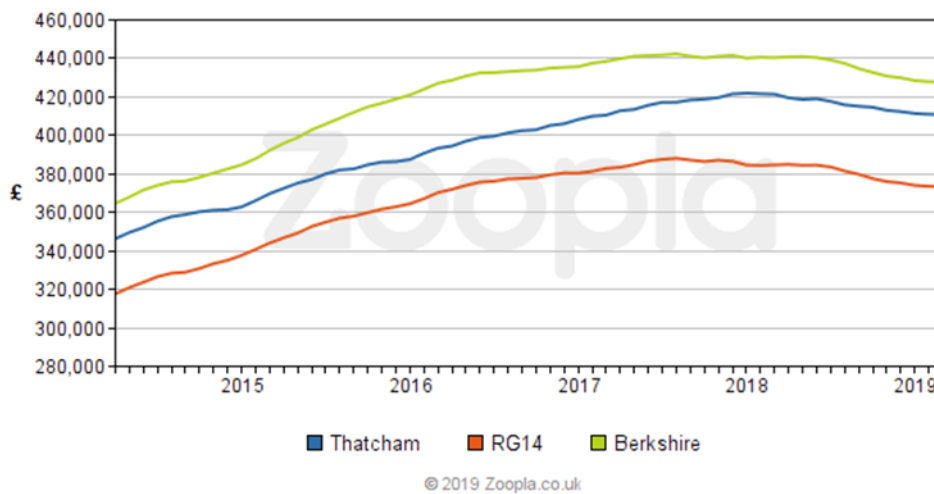


Figure 14: Value trends Thatcham, Newbury, Berkshire (Zoopla)

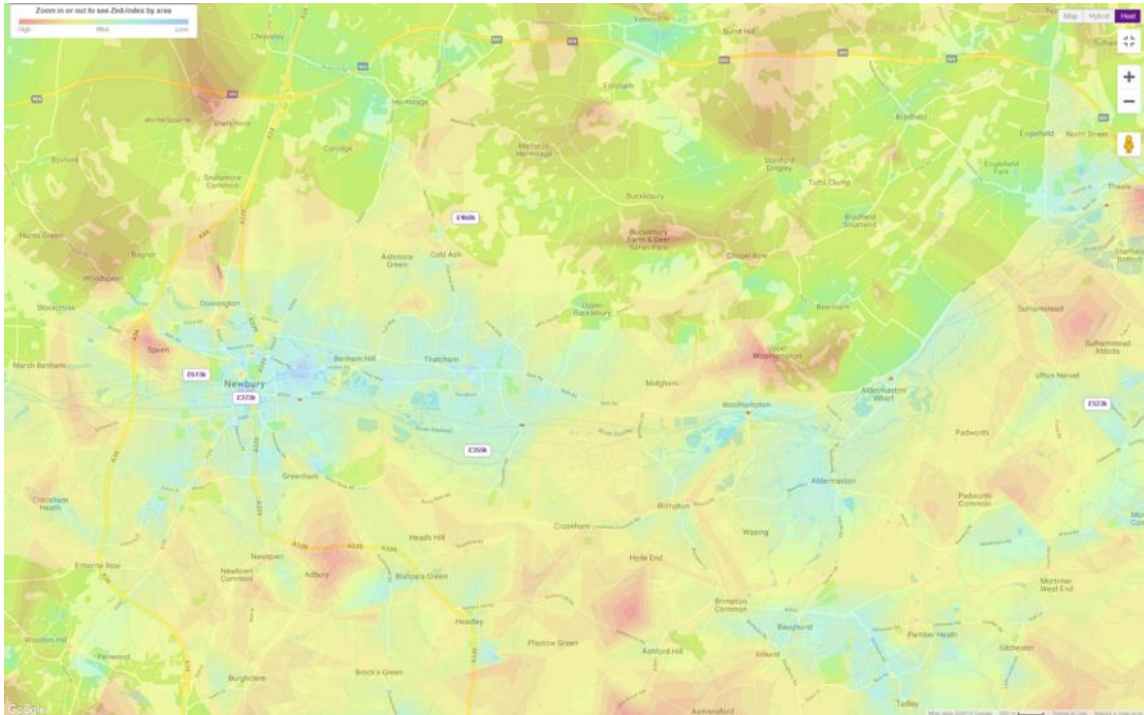
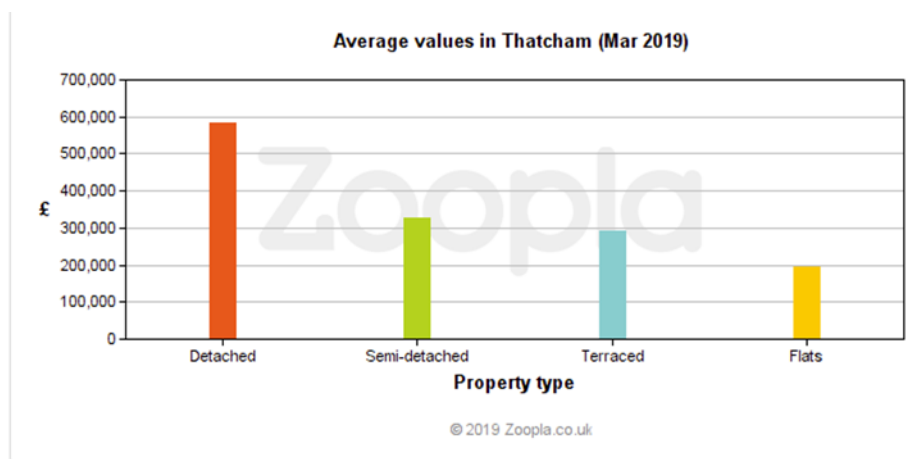


Figure 15: House value heat map for Thatcham and the surrounding area. (Zoopla, March 2019)

Property value data/graphs for Thatcham

| Property type | Avg. current value | Avg. £ per sq ft. | Avg. # beds | Avg. £ paid (last 12m) |
|---------------|--------------------|-------------------|-------------|------------------------|
| Detached | £583,465 | £347 | 3.9 | £524,763 |
| Semi-detached | £327,352 | £327 | 3.0 | £329,759 |
| Terraced | £290,815 | £326 | 2.7 | £291,555 |
| Flats | £195,164 | £297 | 1.9 | £214,984 |



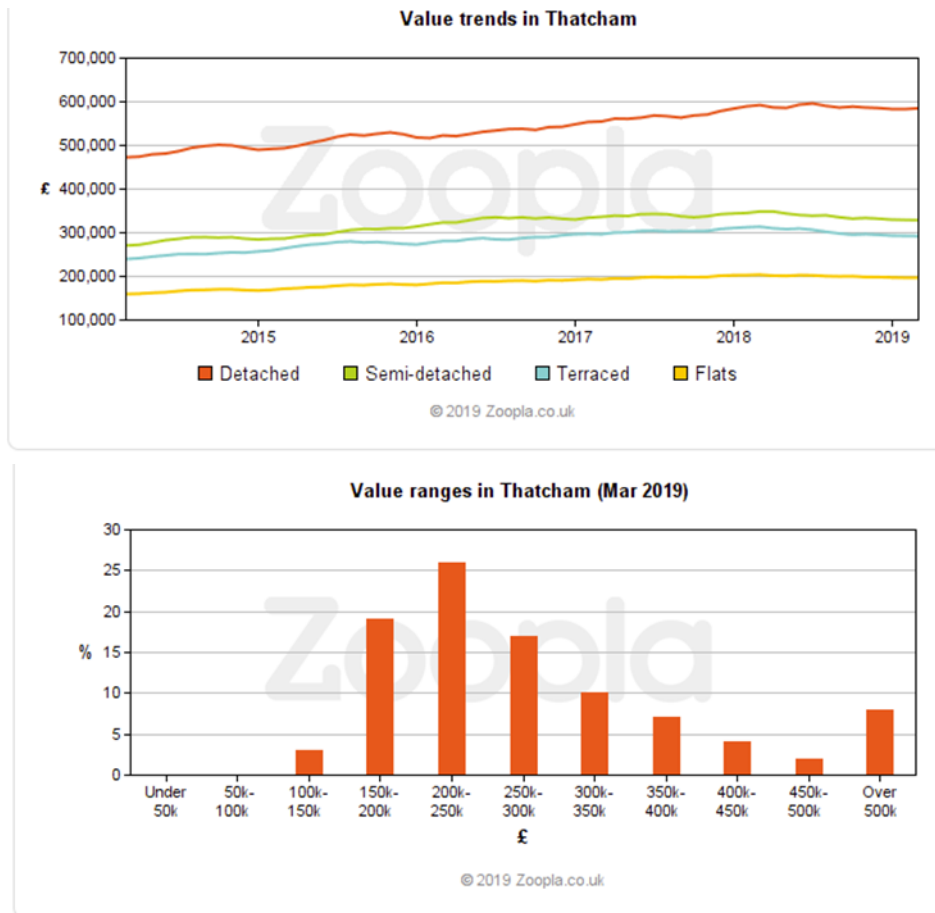


Figure 16: Value data for Thattham (Zoopla, Mar 2019)

The property value data graphs above show a large differential between the value of detached properties and semi-detached properties in Thattham. This mirrors the borough-wide position with the average value for detached houses currently in excess of £580,000 compared to £327,000 for semi-detached properties. Values in general are levelling off after a steady increase over recent years.

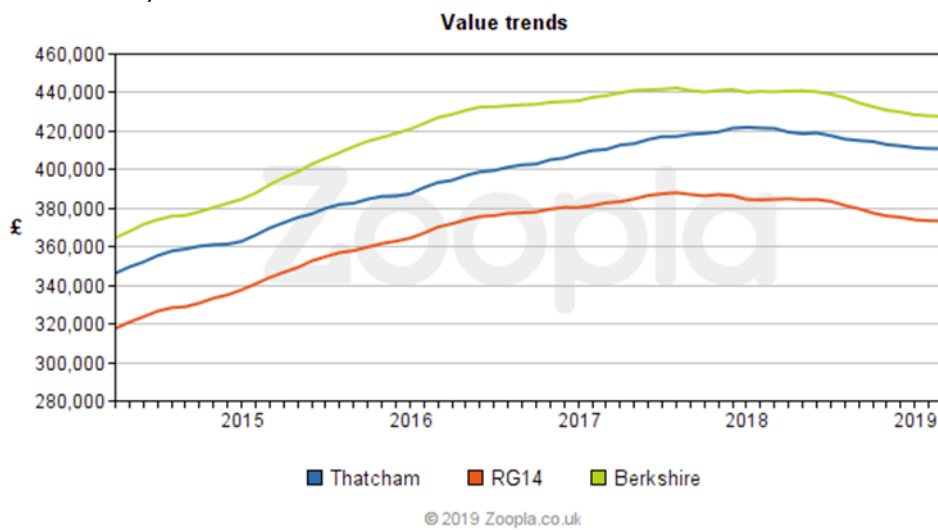


Figure 17: Comparisons between Thattham, Newbury (RG14) and Berkshire as a whole (Zoopla, Mar 2019)

3.16 The majority of values are within the £150,000 to £300,000 i.e. flats, and terraces and smaller semis indicating this has been the most active area of the market in Thattham.

Current asking prices in Thattham

Average: £321,820

| Property type | 1 bed | 2 beds | 3 beds | 4 beds | 5 beds |
|---------------|------------------|------------------|------------------|------------------|-----------------|
| Houses | £192,991 (6) | £269,852 (22) | £333,909 (61) | £446,709 (23) | £560,000 (3) |
| Flats | £161,843 (7) | £199,600 (13) | - | - | - |
| All | £176,219 (13) | £243,759 (35) | £333,909 (61) | £446,709 (23) | £560,000 (3) |

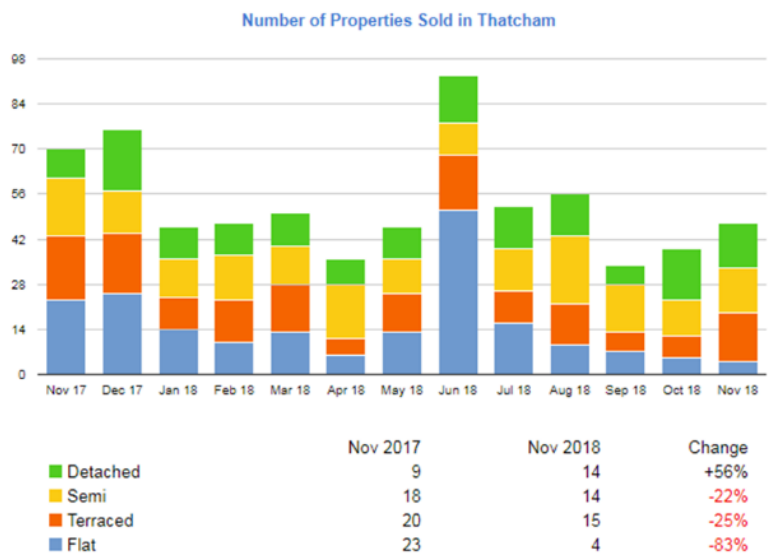
Current asking rents in Thattham

Average: £965 pcm

| Property type | 1 bed | 2 beds | 3 beds | 4 beds | 5 beds |
|---------------|-----------------|------------------|-------------------|-------------------|--------|
| Houses | - | £933 pcm (6) | £1,180 pcm (5) | £1,316 pcm (3) | - |
| Flats | £682 pcm (3) | £811 pcm (7) | - | - | - |
| All | £682 pcm (3) | £867 pcm (13) | £1,180 pcm (5) | £1,316 pcm (3) | - |

Figure 18: Current asking prices and asking rents in Thattham (Zoopla, Mar 2019)

3.17 The data in the asking prices table above indicates that currently the highest number of properties available are 3 bedroomed houses closely followed by 2 and 4 bedroom houses.

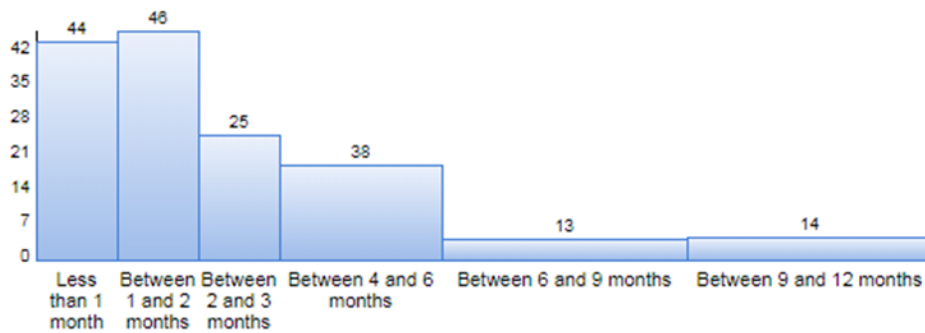


Note: The sold house prices for Thattham were calculated by averaging over all properties sold, as recorded by the Land Registry, within 2 miles of the centre of Thattham - trend lines may be erratic.

Figure 19: Sales volumes in Thattham (HM Land Registry)

3.18 The graph indicates that sales volumes are at lower level than for the same time the previous year in line with reported trends. Flat sales have decreased more dramatically than for other house types but this may be due to the large number of flats sold in June 2018.

Properties for Sale in Thatcham by Time on Market



Note: The area of each bar not its height represents the number of properties

| | No. of properties |
|--------------------------|-------------------|
| Less than 1 month | 44 |
| Between 1 and 2 months | 46 |
| Between 2 and 3 months | 25 |
| Between 3 and 4 months | 29 |
| Between 4 and 6 months | 38 |
| Between 6 and 9 months | 13 |
| Between 9 and 12 months | 14 |
| Between 12 and 18 months | 4 |
| More than 18 months | 5 |

Figure 20: Time taken to sell property in Thatcham (Zoopla, Mar 2019)

3.19 In terms of time it takes to sell, it is clear from the data that Thatcham has a fast moving market with 85% of properties selling within 6 months of coming on to the market. This indicates robust demand and shortage of suitable properties.

Conclusions

3.20 The market review has flagged a number of viability considerations for strategic-scale development in Thatcham.

3.21 The UK housing market is experiencing a significant slowdown in volumes and house price increases. The Berkshire market appears to remain strong, and the fast-moving market in Thatcham seems to indicate strong demand for housing in the local area.

3.22 House prices in Thatcham are stronger than those in Newbury. Detached houses currently sell for less than the district average, but smaller units sell for more than the district average. This likely reflects the extremely desirable rural areas in the AONB in West Berkshire, and the wider mix of housing available in Thatcham.

4.0 TECHNICAL WORKSHOPS

- 4.1 A set of three Technical Workshops took place in Thatcham on Friday 8th March 2019 with technical stakeholders from a variety of sectors.
- 4.2 The workshops covered three themes: Transport & Environmental Health, Green & Blue Infrastructure and Community Wellbeing. These themes had been identified in Stage 1 as of relevance when considering growth in the town.
- 4.3 The main purpose of the workshop was to explore, in broad terms, the potential opportunities arising from strategic scale development, and to understand the nature of the associated infrastructure and service provision required to achieve sustainable development around the town of Thatcham. The workshop did not address a specific site but was broadly aimed at the issues affecting the whole town. In doing so, it is anticipated that a development outcome broadly benefitting the town can be achieved.
- 4.4 The workshop was attended by a mix of Council officers, representatives from key service providers and representatives from the development promoter teams.
- 4.5 Appendix A presents a synthesis of the key issues, opportunities and other points raised at the workshop. These notes do not represent the formal view of WBC or the consultant team but are prepared as feedback and for consideration as part of the study.
- 4.6 Appendix B contains an attendance list of the three workshops.

Conclusions

- 4.6 The technical stakeholder workshops were a positive and forward-looking event that helped inform the study of a number of issues and local actors that will be vital to engage in any growth discussion.
- 4.7 A number of consistent themes emerged during the workshops that could inform decisions on strategic growth of Thatcham, and how development may contribute to addressing issues that the town currently faces.
- 4.8 A significant north-south divide exists within the town, in terms of deprivation, access to services and demographics. The A4 exists as a barrier preventing movement and access to the town centre and station. North-south links do not match up, particularly active travel links. Permeability across the town is considered poor.
- 4.9 There is a considerable active travel opportunity in the town, building on existing infrastructure and local enthusiasm for accessing green and blue assets. Intelligent design taking into account the whole town could aim to build on this to enhance the town's identity, create a distinct place and build new sustainable and desirable neighbourhoods to live in.
- 4.10 The provision situation for education and healthcare is complex and is likely to be affected by national policy decisions in the next few years. Safeguarding of suitable land in developments is essential, as well as imaginative approaches to funding and phased provision which may be needed. A dialogue with the relevant healthcare and education agencies should be established early in the masterplanning process to address concerns that social infrastructure may not be provided.
- 4.11 There was a desire to see the investment that could be provided by significant residential development boosting the whole of the town. Location of services should be considered on a town-wide basis, potentially supported by developer contributions. Similarly, services that are

required on a town-wide basis could be included on the site of new development to “knit” the new areas into the town’s life as a whole. Such an approach could contribute to higher levels of public support and engagement.

- 4.12 Imaginative solutions to drainage, including an ambition for betterment and a step change in thinking from highways and other engineers, must be pursued. Using SUDS as part of a landscape strategy that helps to link the town and new development to the surrounding countryside was identified as essential.

Implications for sites

- 4.13 The technical discussions had a range of outcomes for the different promoted sites submitted to the HELAA.
- 4.14 Sites to the north and north-east will have to consider drainage, landscape sensitivity and strong active travel connections towards the town and public transport corridors. These sites tend to have the advantage of being larger and potentially more able to deliver new facilities on site, and to form the critical mass necessary to enable desired changes in the town centre and wider town provision.
- 4.15 Sites to the south-east are severely constrained by transport and flooding risks. Adding a bridge over the railway is recognised as unviable for delivery and potentially detrimental as it could open Crookham Hill to HGVs and unsuitable volumes of vehicle traffic. It is anticipated that the cost of providing a bridge here would be around £15m. This includes for design, Network Rail technical approvals/Basic Asset Protection Agreement, the planning application, construction and shared value. It also considers track possession and optimism bias and other contingencies. This figure excludes land acquisition and any required CPO. It should be noted that this is only a ball park figure, and further work would be required to provide a more accurate figure.
- 4.16 The discussions were ambitious and keen to deliver improvements that would benefit the whole town, with an understanding that this would require co-ordinated strategic scale developments and significant land. This implies that connected sites that can deliver such growth, such as those in the north-east, should be prioritised in order to deliver on the needs and ambitions of the town as a whole.

5.0 CONCLUSIONS

- 5.1 A broad constraints analysis of the town has indicated that certain sites submitted to the recent HELAA process are more suitable for the delivery of strategic scale growth in Thatcham. Some sites should be discounted at this stage due to the complex constraints that are present, and some sites which are suitable nevertheless have capacity issues imposed by the landscape and other constraints.
- 5.2 The market review suggests that uncertainty in the present housing market could have an impact on viability. Thatcham has strong demand for a variety of housing types. This makes a case for retaining flexibility in the types of housing delivered over a strategic site build-out period. Thatcham's market has particularly strong demand when compared to the rest of West Berkshire for smaller housing units including flats.
- 5.3 The technical workshops were a positive event finding considerable common ground between the various stakeholders, and a desire to engage and take ownership of the process of development to benefit the town as a whole.
- 5.4 There was a strong desire amongst participants for improvements in services in the town, and a recognition that growth is a way of delivering this.

Recommendations

- 5.5 Recommendations for growth are based on a combination of the assessments in section 2, outputs from the technical workshops in section 4, and the baseline research established in the previous Stage 1 report.
- 5.6 The combination of research from Stage 1 and Stage 2 indicates that if strategic development were to occur in Thatcham, the most appropriate locations for this study to examine in more detail are Harts Hill Farm (THA6, THA8) and Siege Cross Farm (THA10), which along with the site at Colthrop Manor (THA14) are part of the North-East Thatcham consortium. All of these sites should be investigated in more detail in Stage 3.
- 5.7 The sites 'Land at Harts Hill Farm (Sites B and C)' (THA16, THA17) are closer to the AONB boundary and higher on the slopes above Thatcham, and are more constrained for development in terms of topography, landscape sensitivity and ecology.
- 5.8 Land at Henwick Park (CA12) (and the enclosed sites The Creek (CA16) and Regency Park Hotel (CA17)) could be considered as part of masterplanning work, however their isolation from the NE Thatcham sites, and separate land control, presents issues in designing a comprehensive strategic development. An allocation on the site presents an opportunity to add additional housing units if required, and the potential residential capacity and provision of facilities and open space has been tested through recent planning applications and appeals. The Stage 3 study, through the community engagement process, should develop principles for development in Thatcham that could be applied by all smaller sites that do not form part of a contiguous strategic allocation.
- 5.9 Sites to the south of the railway line in the south-east of the town present multiple constraint and viability challenges to development and should not be taken forward in this study.
- 5.10 Sites to the west of the town, in the open countryside between Newbury and Thatcham, are not constrained physically. Development on these sites would however create a significant change in the spatial relationship between the two towns, leading to their coalescence. This would not accord with the overall spatial strategy for the District, failing to maintain and enhance the

identity of Thatcham, separate to that of Newbury and the surrounding rural settlements, in accordance with policy ADPP3. These sites are also isolated from other sites and would not be able to provide the critical mass needed for significant improvement in services in the town.

- 5.11 Land at Elmhurst Farm (CA13) should not be included in the Stage 3 study due to its isolation from the other sites, isolation from Thatcham as a whole, and relatively small size.
- 5.12 Small sites such as Hollington Place (THA15), Lower Way Farm (THA9), Little Copse (CA11) and Hebden Close (THA7) should be excluded from the rest of this study as they are not of sufficient scale to deliver a strategic allocation. This does not mean they are unsuitable for development, simply that they fall outside of the scope of this study.

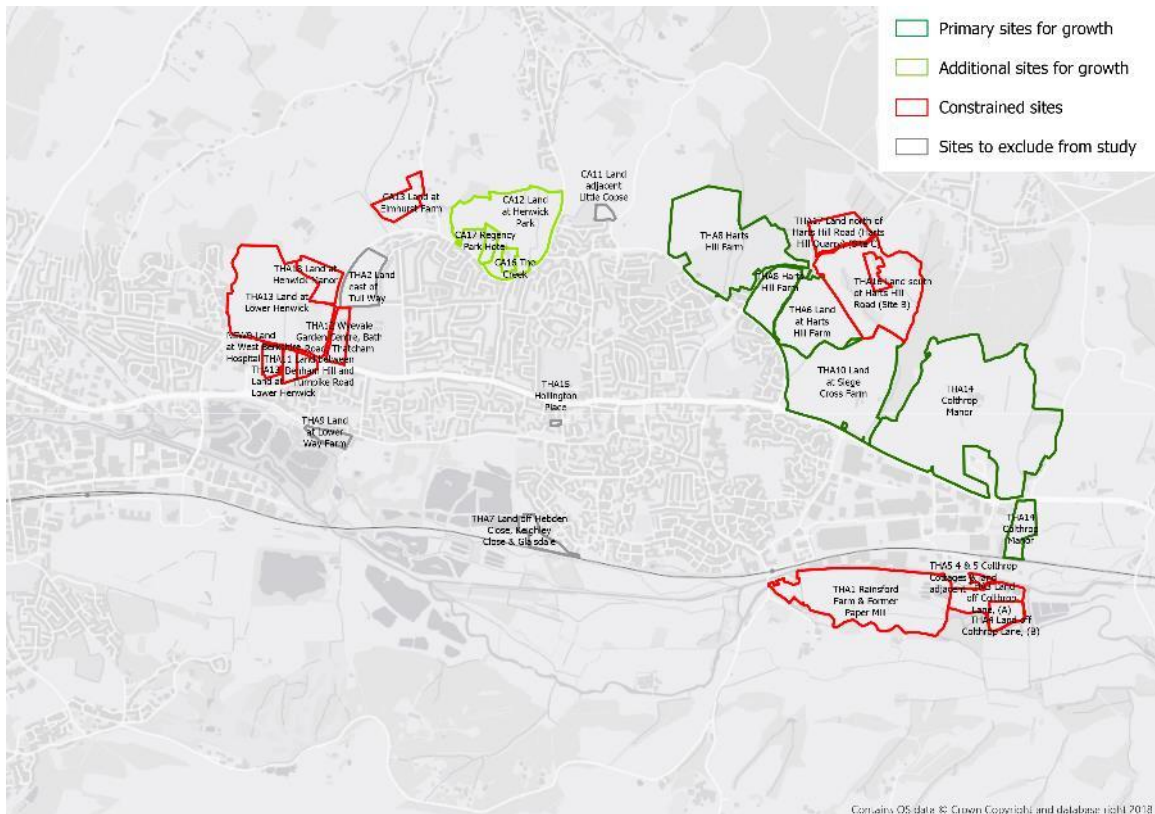


Figure 21: Recommendations for suitable sites to take forward to Stage 3 masterplanning

- 5.13 These recommendations are based on the findings of this study to date, and are subject to approval and consideration by WBDC.

| Ref | Site Name | Current Use | Area (ha) | Potential Dwellings (as submitted by promoter) |
|-------|---|-------------------------------|-----------|--|
| THA7 | Land off Hebden Close, Keighley Close & Glaisdale | Agriculture | 3.44 | 103 at 30dph |
| THA1 | Rainsford Farm & Former Paper Mill | Former paper mill, aggregates | 36.2 | 950 |
| THA2 | Land east of Tull Way | Open land | 7.49 | 45 & 30 affordable |
| THA4 | Land off Colthrop Lane, (B) | Grassland (landfill) | 3.38 | None as for employment (B2 and B8) |
| THA3 | Land off Colthrop Lane, (A) | Sand and gravel processing | 9.67 | None as for employment (B2 and B8) |
| THA5 | 4 & 5 Colthrop Cottages & land adjacent | Residential | 0.67 | 7-30 |
| THA6 | Land at Harts Hill Farm | Agriculture | 16.34 | 200 |
| THA9 | Land at Lower Way Farm | Vacant | 2.87 | 36 |
| THA10 | Land at Siege Cross Farm | Agriculture | 35.7 | 500 |

| | | | | |
|-------|--|---------------------|-------|--|
| THA11 | Land between Benham Hill and Turnpike Road | Agriculture | 1.62 | None as for employment |
| THA12 | Wyevale Garden Centre, Bath Road, Thatcham | Garden centre | 3.7 | Not outlined (site also promoted for employment and rationalised garden centre). |
| THA13 | Land at Lower Henwick | Agriculture | 36.5 | Not outlined (site also promoted for commercial use) |
| THA14 | Colthrop Manor | Agriculture | 81.2 | 500-800 |
| THA8 | Harts Hill Farm | Agriculture | 44.5 | 591 |
| THA15 | Hollington Place | Residential | 0.2 | Not outlined |
| THA16 | Land south of Harts Hill Road (Site B) | Agriculture | 30.59 | 500 |
| THA17 | Land north of Harts Hill Road (Harts Hill Quarry) (Site C) | Agriculture, quarry | 6.03 | 150 |
| THA18 | Land at Henwick Manor | Agriculture | 4.09 | Not outlined. |
| CA11 | Land adjacent Little Copse | | 0.8 | 21 |
| CA12 | Land at Henwick Park | Agriculture | 31 | 225 |
| CA16 | The Creek | Residential | 1.7 | Not outlined |
| CA13 | Land at Elmhurst Farm | Equestrian | 4.26 | 86 |
| CA17 | Regency Park Hotel | Hotel | 2.1 | Not outlined |
| NEW9 | Land at West Berkshire Hospital | Grassland | 3.7 | 104 |

Table 2: Recommendations of sites to include in Stage 3 masterplanning. Colour coding matches that in Figure 21.

5.14 Based on indicative capacities from submitters, a total of 1791 – 2316 dwellings could be built, however these figures are subject to significant revision during the Stage 3 strategic masterplanning.

Stage 3

5.15 This report forms the base for Stage 3 of the Strategic Growth Study: Thatcham Future. This stage will look in detail at development aspirations for Thatcham, capacity of the identified sites, and how broad benefits for the town could be realised through a masterplanning approach.