

Attachment A



Pacific Highway Upgrade Program
Wells Crossing to Iluka Road Upgrade
Business Focus Group Meeting – 8 November 2005



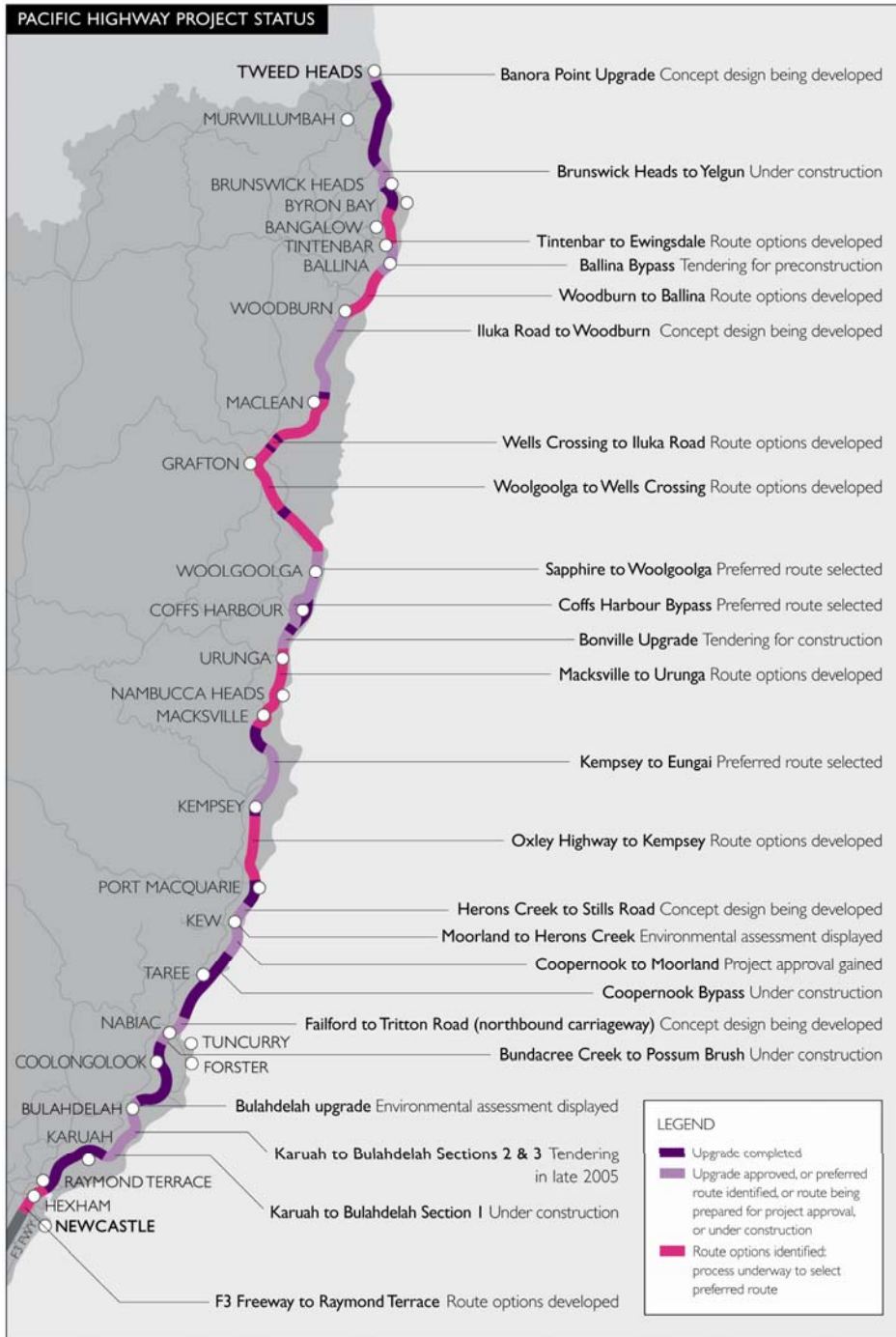
Agenda

- › Welcome
- › Introduction and Purpose of Meeting
- › Current Situation
- › Improvement Options
- › Results of Business Impact Survey
- › Discussion
- › Concluding Remarks and Way Forward
- › Impacts of Bypasses on towns



Introduction and Purpose of Meeting

- › The Pacific Highway Upgrade Program
- › Community Consultation and Displays
- › Purpose of this meeting:
 - » To share business survey findings
 - » To openly discuss issues and concerns of business community
 - » To report meeting outcomes as input to next stage



Pacific Highway Upgrade Program



Improvements to Date

» Average crash rates halved

» Average travel time savings about 1 hour (full trip)

» Through-traffic removed from towns



Current Situation - Traffic

Pacific Highway Traffic

- » Traffic volumes 7,500 vehicles per day (20% heavy)
- » Through-traffic 2,250 vehicles per day (30%)
- » Through-trucks 750 trucks per day (10%)

Rail / Bus Traffic

- » 3 daily Countrylink services (Sydney-Queensland)
- » Less than 2,000 long distance passenger trips per day in Study area
- » Percent of total tonnes moved by rail:
 - **9% interstate**
 - **25% inter regional**



Current Situation – Passing Trade

Estimate of Stopping Through Traffic (up to 3 hours)

Vehicles Per Average Day ⁽¹⁾

	Light	Heavy	Total
South to North	170	10	180
North to South	270	40	310
Total	440	50	490 (6-7%)

(1) Excludes brief fuel stops and overnight stops



Regional Growth

Population and Pacific Highway Traffic Growth Rates, 1996-2041

	Annual Growth Rate (%)			
	1990-2001	2001-2021	2021-2031	2031-2040
Population	0.9	0.9 – 1.3	0.9 - 1.3	0.9 – 1.3
Local Traffic	1.4	1.7	1.7	1.7
Through-Traffic	2.4 ⁽¹⁾	3.3	2.2	2.2
Commercial Vehicles	⁽²⁾	4.0	3.5	3.0

Notes:

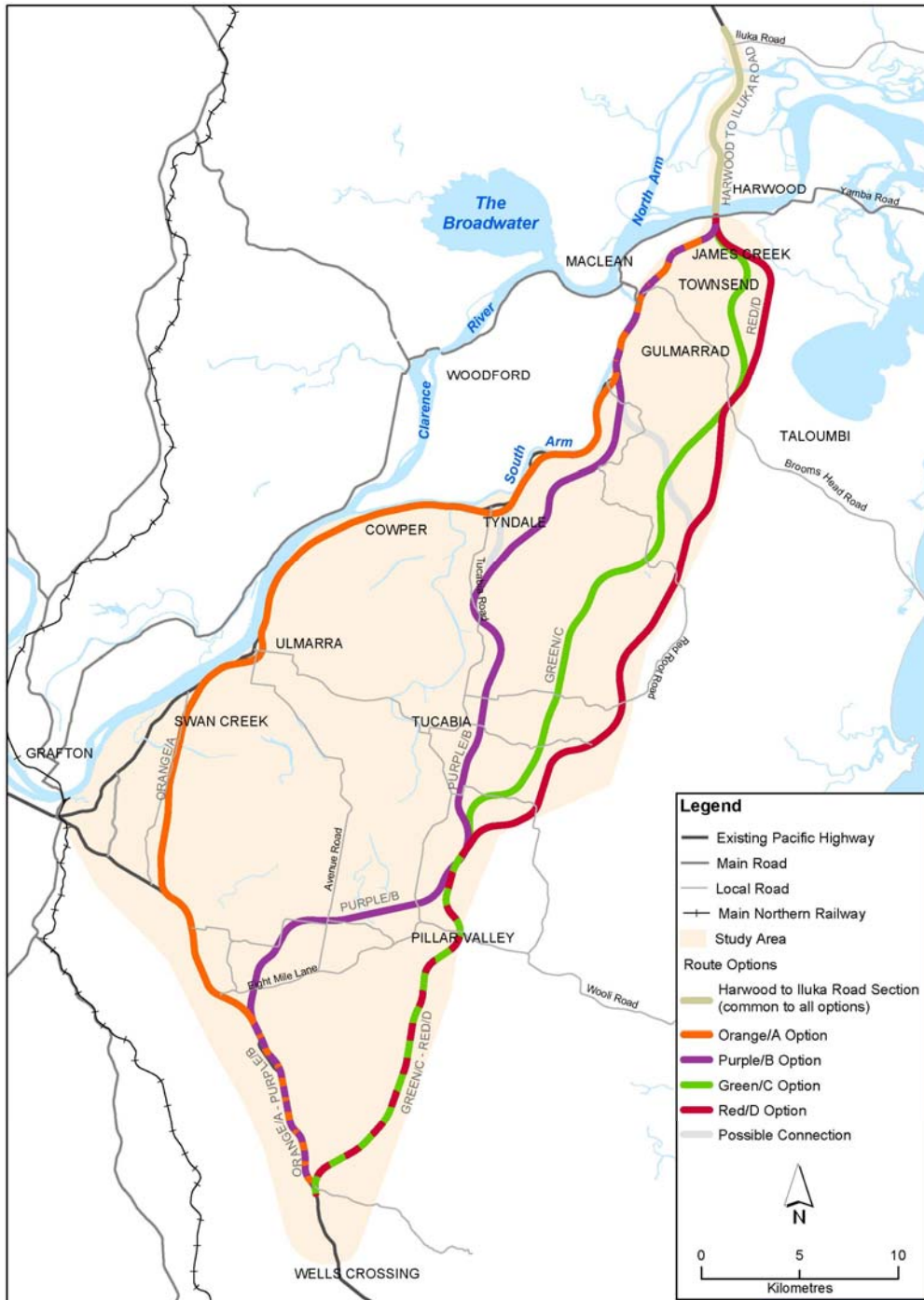
1) From 1998 to 2001 growth rate was 3.3%pa. The long run traffic growth trend has been 2.2%pa from 1978 to 2001.

2) Not known.

» AADT forecast to double over next 30 years

» Freight vehicles 25% of AADT in 2030

Improvement Options





Economic/Employment Base

Employment Base

- » 41,000 population (2001)
- » 32,000 working age (15 years and older)
- » 49% labour force (90% employed and working)

Economic Base

- » 1,460 business establishments
- » 40% retail trade, including accommodation
- » 9% manufacturing
- » 7% construction
- » 8% primary production

Business Survey

Purpose: “To assess potential impacts of the highway upgrade on businesses in the study area”.

Response: 203 business questionnaires posted

33 returned (16%)

- **Accommodation (23%)**
- Motor vehicle services (20%)
- Cafés and restaurants (22%)
- Tourism services (33%)



Distribution of Survey Respondents

South Grafton	41%
Grafton	21%
Macleay	26%
Other	12%



Business Survey Findings

Source	% of Annual Turnover
District residents	42%
Highway passing through traffic	35%
Visitors/tourists staying in district/region	19%
Businesses you service/supply that are dependent on highway traffic	3%
Other	1%
Total	100%

Source: Survey of Business Establishments, Question 7 (average of responses)

» 35% of total annual turnover of respondents from businesses dependent on highway passing through traffic



Business Survey Findings

- › Most respondent (60%) businesses dependent on highway passing traffic
- › About 40% of respondents businesses income affected by their location to the Highway
- › Majority of respondents expect their business profitability to be affected by upgrade options

Wells Crossing to Iluka Road Upgrade Project



Effect of Upgrade Options on Business Profitability

	Upgrade on existing alignment	Upgrade close to existing alignment	Upgrade along new route away from existing highway
Direction of effect			
Positive effect	53%	47%	13%
No effect	31%	20%	10%
Negative effect	16%	33%	77%

Size of effect			
Positive			
Large	47%	21%	25%
Medium	35%	43%	50%
Small	18%	36%	25%
Negative			
Large	40%	50%	75%
Medium	20%	30%	8%
Small	40%	20%	17%
Source: Survey of Business Establishments, Question 9 (count of responses expressed as percentage)			

Conclusions

- › Majority of respondents (84% to 67%) expect positive or no effect from western options
- › 77% of respondents expect a negative impact on their business from eastern options
- › Overall, negative impact from eastern options likely to be small in total regional economy – estimated at 3% of regional employment
- › Indirect economic effects (eg. Consumption expenditure) likely to be small
- › Any short-term losses of turnover and employment unlikely to have significant cumulative effect on economic viability of the area

- › Evidence from elsewhere:
 - » Hume Highway
 - » UK towns

- › Impacts along the Pacific Highway