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1. Introduction

1.1 Project background

Roads and Maritime Services (Roads and Maritime) has proposed to upgrade about 2.4 kilometres of The Horsley Drive between the M7 Motorway and Cowpasture Road. The proposal includes:

- A four lane divided road between the M7 Motorway and Cowpasture Road with a wide central median to allow for six lanes in the future
- An extra eastbound lane from west of Ferrers Road to Cowpasture Road
- New and upgraded traffic light intersections at:
  - The Horsley Drive and Ferrers Road, including a bus priority lane
  - The Horsley Drive and Cowpasture Road north
  - The Horsley Drive and Cowpasture Road south
- An additional right turn onto Wallgrove Road north with provision for a second westbound lane between the M7 Motorway interchange and Wallgrove Road when required
- Extending turning lanes on The Horsley Drive eastern approach to the M7 Motorway interchange
- A new turning bay opposite the Ferrers Road intersection
- A new access road at the Ferrers Road intersection providing safe access to WaterNSW land
- A pedestrian and cyclist shared path along the southern side of The Horsley Drive, connecting to the Western Sydney Parklands cycleway
- A footpath on the northern side of The Horsley Drive
- A new protection structure over the heritage listed Westons Tunnel
- A single span concrete bridge over Eastern Creek.

Between June and August 2017, Roads and Maritime sought community feedback on the concept design and Environmental Investigation Report for the proposal. A number of businesses near the roundabout at The Horsley Drive and Cowpasture Road raised concerns that the proposed upgrade of the roundabout to an intersection with traffic lights may impact their business operation, due to the loss of U-turn access at this location. Roads and Maritime is currently preparing a submissions report in response to community feedback.

1.2 Purpose of this report

In 2017, The Horsley Drive Upgrade – Impact on Local Accessibility Assessment Technical Note (Draft) (SMEC, 2017) (the traffic data report) was prepared as part of the environmental investigations. The traffic data report identified that access to businesses may be affected by the proposed upgrade of the roundabout at The Horsley Drive and Cowpasture Road, due to the loss of U-turn access at this location.

Roads and Maritime engaged GHD to prepare a business impact assessment (BIA) to understand the potential impacts to businesses located at three sites to the east of the roundabout at The Horsley Drive and Cowpasture Road. These sites are shown in Figure 1-1.

The purpose of this BIA is to:
1. Identify the nature of the businesses (e.g. type, operation, origin and type of customers, such as walk-in, passing trade and appointments, and deliveries) that may be affected by the proposal. 
2. Understand perceptions about the potential impacts on businesses based on consultation with owners and managers. 
3. Understand perceptions about accessibility to businesses based on consultation with customers. 
4. Assess the potential impacts on businesses as a result of the proposal. 
5. Provide recommendations to address any potential significant business impacts.

1.3 Location of the businesses subject to this BIA

The proposal site is located on The Horsley Drive between the M7 Motorway and Cowpasture Road. The Horsley Drive is a strategic freight link and arterial road between the Smithfield/Wetherill Park industrial area and the M7 Motorway.

This BIA focuses on the three sites within the established Wetherill Park industrial/commercial area, potentially impacted by changes to the current access arrangements on The Horsley Drive as a result of the proposal. The three sites are:

- 1 & 2 Cowpasture Place, Wetherill Park
- 1353, 1357 and 1345 The Horsley Drive, Wetherill Park
- 1336 The Horsley Drive, Bossley Park.

Figure 1.1 shows the location of the three sites within the Wetherill Park industrial/commercial area. There are approximately 90 businesses located across the three sites.

Figure 1-1 Location of the businesses subject to this BIA

Source: SMEC, 2017
2. **Methodology**

This BIA has been prepared following the tasks outlined below. It has been informed and guided by the Roads and Maritime *Environmental Impact Assessment Practice Note - Socio-economic impact assessment (EIA-N05)* (2013).

### 2.1 Scoping and review of background information

A review of the background information was undertaken to understand the proposal and potential impacts on businesses, the businesses in the local area and their characteristics. Background information included the proposal description, submissions received by the businesses, and online information about the businesses, including contact details, where available.

Based on this review, GHD, in consultation with Roads and Maritime, developed an approach to survey the businesses and conduct an intercept survey of customers.

### 2.2 Profile of the businesses

A review of the characteristics of the businesses was undertaken based on the business type, understanding of the customer base and access to the businesses.

To understand current access to and from the businesses, a review of existing traffic data at the Horsley Drive and Cowpasture Road intersection was undertaken based on *The Horsley Drive Upgrade – Impact on Local Accessibility Assessment Technical Note (Draft)* (SMEC, 2017) (the traffic data report). This included the number of vehicles taking a U-turn at the roundabout to access the businesses at the three sites. This data has been used indicatively only.

### 2.3 Consultation with the businesses and customers

A business survey was developed for consultation with businesses. The survey questions were developed to understand:

- The existing situation, such as the nature of businesses, customer base, access to businesses and type of customers
- How this situation would change if the proposal was implemented
- What measures could be adopted by the business to minimise any impacts.

A customer survey was also developed to seek information on:

- The businesses being visited
- Origin of the customer
- Frequency of visits to the businesses
- Purpose of the visit
- Whether customers used the roundabout at The Horsley Drive and Cowpasture Road to access the businesses
- Whether the customer would continue to visit if the proposal was implemented.

Customers were provided with Roads and Maritime maps showing the alternate routes in relation to the three sites, including potential additional travel distance and time. Alternate routes are discussed within Section 3.

The business and customer survey questions are provided in Appendix A and Appendix B.
The GHD team attempted to contact all businesses identified within the three sites. The calls were made to businesses between Wednesday 7 March 2018 and Friday 9 March 2018 to inform them of the upcoming survey. Businesses were also asked to provide the busiest times for the GHD team to conduct a customer survey.

The business and customer surveys were undertaken between 8am to 5pm on Wednesday 14 March 2018 and 9am to 3pm on Saturday 17 March 2018. Based on the initial scoping exercise and verification during the site visits, the team estimated 90 businesses were located across the three sites.

In total, 29 businesses and 65 customers responded to the surveys on both survey days. In addition, 19 businesses were provided with a paper survey to complete in their own time by Wednesday 21 March 2018. A further 13 businesses were emailed a survey because they were either closed or unavailable on both days. Five businesses contacted did not wish to complete a survey.

On Monday 26 March 2018, follow-up calls were made to businesses that had contact details available to remind them to complete the survey by the final closing date of Wednesday 28 March 2018. Following the reminder calls, a further three business surveys were received, bringing the total number of business surveys to 35. All survey forms received up to the date of writing this report were incorporated into the business survey results.

### 2.4 Analysis of the survey results

Analysis of the survey results was undertaken to identify the potential impacts of the proposal on the businesses. The survey results are presented in Appendix C. Where relevant, the results of the business and customer surveys were cross-tabulated to further understand the potential impacts (e.g. customer origin, purpose of visits, accessibility to the businesses if the proposal was implemented).

A number of questions in the business survey allowed respondents to choose more than one answer. These questions have been identified within Sections 3.

### 2.5 Business impact assessment and recommended strategies

The potential impacts of the proposal on businesses were identified and assessed based on the findings of the business survey, customer survey and review of background information. Strategies have been developed in response to the potential business impacts identified under the impact assessment. These strategies have been recommended for potential implementation by the businesses and Roads and Maritime to reduce or mitigate these impacts. This is presented in Section 5.

### 2.6 Limitations

This BIA is subject to the following limitations:

- During the calls to businesses between Wednesday 7 March 2018 and Friday 9 March 2018 to inform them of the upcoming survey, a number of businesses did not answer, or their phone line was disconnected. Follow-up calls were made to businesses that did not answer during this period. During the visit to the sites, the GHD team was informed that a fire had recently occurred at 1345 The Horsley Drive causing a closure of around four businesses. Overall, 20 of the approximately 90 businesses in the study area were closed or not contactable during the survey period.

- As shown in Table 3-1, a smaller proportion of businesses were successfully surveyed at 1353, 1357 and 1345 The Horsley Drive (29% or 20 out of 69 businesses) compared to 1 & 2 Cowpasture Place (70% or 14 out of 20 businesses) and 1336 The Horsley Drive.
(100% or 1 out of 1 business) were surveyed. The lowest response rate amongst the business types was for construction (one out of 16) and manufacturing (two out of six) businesses at 1353, 1357 and 1345 The Horsley Drive. The nature of these businesses may have limited their ability to participate in the survey during the nominated survey times. They may also have less interest in participating due to their customer base being more likely to be by appointment.

- Customer surveys were conducted across the three sites on the survey days. Customers were invited to complete the survey at various locations along outdoor walkways or carparks of the sites. It is noted that some customers surveyed visited businesses that have not responded to the business survey. Two customers did not wish to specify which businesses they were visiting. Similarly, some businesses that have responded to the business survey may not have corresponding customer survey data. Customer surveys were limited to outdoor areas of businesses. As a result, there is some limitation in the comparative analysis between the business survey and customer survey data.
3. Existing conditions

This section provides an overview of the businesses who responded to the survey across the three sites, including information about customers and delivery vehicles. This section also discusses the access to the three sites, based on a review of the traffic data report.

3.1 Overview of the businesses across the three sites

The three sites are located within the established Wetherill Park industrial/commercial area. There are approximately 90 businesses located within the three sites. The two sites at 1353, 1357 and 1345 The Horsley Drive and 1 & 2 Cowpasture Place are characterised by industrial and commercial businesses. The third site at 1336 The Horsley Drive contains a retail florist and nursery.

In total, 35 businesses and 65 customers were surveyed across the three sites. Of the 35 businesses across all sites that responded to the survey, the most common business types were retail services, and construction services. However, it is noted that only one construction business at 1353, 1357 and 1345 The Horsley Drive responded to the survey. Table 3-1 lists the business types and whether they were successfully surveyed for each site.

As detailed in Table 3-1, 70% of sites within 1 & 2 Cowpasture Place were surveyed, which is considered a representative sample. 29% of businesses at 1353, 1357 & 1345 The Horsley Drive were surveyed, which is unlikely to be representative. However, the findings of this BIA are supported by additional data by the 41 customer surveys at this site. Only one business is located at 1336 The Horsley Drive, which means the survey is representative for this site.

Of the 35 businesses who responded to the survey, seven did not receive any walk-in/passing trade because they received customers by appointment only, or provided deliveries or services off-site. The rest of the businesses surveyed have varying levels of walk-in/passing trade.

Two-thirds of the responding businesses surveyed (21) indicated that their customers come from the local area, such as Smithfield and Eastern Creek. Twenty businesses indicated their customers come from surrounding areas, such as Blacktown, Parramatta, and Liverpool, and other parts of Sydney. Five businesses indicated their customers come from other locations, including Canberra, Newcastle, other parts of NSW and Australia.
### Table 3-1 Types of businesses across the three sites

<table>
<thead>
<tr>
<th>Business type</th>
<th>1 &amp; 2 Cowpasture Place</th>
<th>1353, 1357 &amp; 1345 The Horsley Drive</th>
<th>1336 The Horsley Drive</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Surveyed</td>
<td>Not surveyed</td>
<td>Surveyed</td>
</tr>
<tr>
<td>Automotive services</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Construction</td>
<td>6</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>1</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Property management</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Recreation</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Retail services</td>
<td>4</td>
<td>5</td>
<td>13</td>
</tr>
<tr>
<td>Self-storage</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Transport services</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>14 (70%)</strong></td>
<td><strong>6 (30%)</strong></td>
<td><strong>20 (29%)</strong></td>
</tr>
<tr>
<td><strong>Total businesses</strong></td>
<td>20</td>
<td></td>
<td>69</td>
</tr>
<tr>
<td><strong>Customer surveys</strong></td>
<td>13</td>
<td></td>
<td>41</td>
</tr>
</tbody>
</table>

Table note: Businesses were able to identify more than one type of product or service provided at their business.
3.1.1 Review of the traffic data report in relation to the three sites

To understand the number of vehicles making a U-turn at the roundabout in order to access the three sites, a review of the traffic data report was undertaken, which provides a count of light and heavy vehicles that took a U-turn at the roundabout on:

- Thursday 9 February 2017 during the AM (7am to 9am), PM (4pm to 6pm) and midday off peak periods (11am to 1pm)
- Saturday 11 February 2017 during the midday off-peak period (10am to 2pm).

Overall, the traffic data report indicated that on a weekday around 3,900 vehicles per hour pass through the roundabout during the AM Peak and around 3,700 vehicles per hour in the PM peak. The total number of U-turn movements is around 47 vehicles per hour during the AM peak and 43 vehicles per hour during the PM peak, which represents around 1.2% of total traffic travelling through the roundabout during both peaks on a weekday. Therefore, 1.2% of total traffic is potentially travelling to or from the three sites.

The traffic data report found that the highest number of U-turn movements at the roundabout occur from the east on The Horsley Drive on Saturday (around 44 vehicles per hour) and during the AM peak period on weekdays (around 37 vehicles per hour). The number of heavy vehicles taking U-turn movements is very small (around one to three vehicles per hour).

Based on the traffic data report, if the proposal is implemented, the travel times to access and exit the three sites for only certain directions via alternative routes are predicted to be up to four minutes longer during both AM and PM peak periods. The report concluded that some drivers may consider the increased travel time to be minor considering overall commuter journey times and congested network conditions in Sydney. On the other hand, some drivers may consider this to be significant.

3.2 Businesses located at 1353, 1357 and 1345 The Horsley Drive

This site is located on the northern side of The Horsley Drive. The site is industrial/commercial and includes approximately 69 businesses, comprising construction, automotive services, manufacturing, wholesale retail, professional services, recreation facilities, and food and beverage services. Twenty of the 35 businesses surveyed are located at this site.

The 20 businesses surveyed represent approximately 29% of the businesses at the site. As shown in Table 3-1, the lowest response rate amongst the business types at this location was for construction (one out of 16) and manufacturing (two out of six) businesses. The nature of these businesses may have limited their ability to participate in the survey during the nominated survey times. They may also have less interest in participating due to their customer base being more likely to be by appointment.

3.2.1 Overview of businesses

As seen in Figure 3-1, of the 20 businesses surveyed, the most common types were retail (thirteen businesses), manufacturing (three businesses), recreation (three businesses), and automotive services (two businesses).
Figure 3-1 Types of services/products

Note: Businesses were able to identify more than one type of product or service provided at their business.

3.2.2 Information about the customer base

Type of customers

Figure 3-2 shows the type of customers received at the surveyed businesses. Four businesses rely on passing trade; four receive appointments only, while eleven businesses receive both passing trade and appointments. One business did not answer this question.

Figure 3-2 Type of customers received at the businesses

Surveyed businesses received varying levels of appointments (as a proportion of all customers) as seen in Figure 3-3.

Figure 3-3 Proportion of appointments out of all customers
**Origin of customers and transport mode**

As seen in Figure 3-4, sixteen businesses received customers from the local area. Twelve businesses received customers coming from the surrounding areas. Ten businesses received customers coming from other parts of Sydney. One business did not answer this question.

![Origin of customers](image)

**Figure 3-4 Origin of customers**

Note: Businesses were able to choose more than one answer for this question.

Most businesses (18) indicated that their customers travel to their business by car only. Two businesses indicated that their customers travel mostly by car, as well as some walking or taking public transport.

**Busiest days and times for customers**

The busiest day for customers for most businesses (16) is Monday, followed by Tuesdays to Saturdays (between 11 and 13 businesses). One business stated that Sunday was busiest.

Two businesses did not answer this question.

Between 10 and 12 businesses considered their busiest times of day for customers are between business hours of 7am to 5 pm. Two businesses stated their busiest times were 5pm to 9pm, and one business stated their busiest time was after 9pm. One business did not answer this question.

**3.2.3 Information about delivery vehicles**

Most businesses (16) receive deliveries by trucks and vans (14). Some businesses received deliveries by car (seven) and trucks with trailers (four). One business does not receive delivery vehicles.

**Busiest days and times for delivery vehicles**

Weekdays are the busiest for deliveries for most businesses (between 12 and 15 businesses). Four businesses considered that Saturdays were their busiest.

The busiest times for deliveries are between 7am to 5pm (between eight and 11 businesses). One business considered their busiest time was after 9pm, while another answered “other” because their delivery times vary.

**Delivery access**

Six businesses indicated that most of their delivery vehicles come from the west. Six businesses indicated that most of their delivery vehicles come from the east while seven exit to the east. Five businesses indicated that delivery vehicles come equally from both directions along The
Horsley Drive, with four indicating that deliveries exit in both directions. Four respondents stated that this question was not applicable to their business.

### 3.2.4 Access to the site

**Vehicles accessing the site after using the roundabout**

Based on the traffic data report, an average of 16 vehicles per hour travel to the site after using the roundabout. As shown in Table 3-2, the period when the highest number of vehicles (43) access the site after taking a U-turn at the roundabout is during the midday off peak. However, the highest proportion of vehicles is during the PM peak (92%).

**Table 3-2 Number and proportion of vehicles accessing the site after making a U-turn at the roundabout**

<table>
<thead>
<tr>
<th>Period</th>
<th>Number of vehicles accessing the site after using the roundabout</th>
<th>Proportion of vehicles accessing the site after using the roundabout</th>
</tr>
</thead>
<tbody>
<tr>
<td>AM (7am to 9am)</td>
<td>29 out of 54</td>
<td>54%</td>
</tr>
<tr>
<td>Midday off peak periods (11am to 1pm)</td>
<td>43 out of 51</td>
<td>84%</td>
</tr>
<tr>
<td>PM (4pm to 6pm)</td>
<td>24 out of 26</td>
<td>92%</td>
</tr>
</tbody>
</table>

Source: SMEC, 2017

**Alternate access routes to the site**

Two alternate access routes to the site are outlined in Table 3-3. These routes would require drivers to travel up to an additional 2.4km or four minutes to access the site. These are shown in Figure 3-5 and Figure 3-6, with the location of the site shown in green.

**Table 3-3 Alternate access routes to the site**

<table>
<thead>
<tr>
<th>Alternate access routes</th>
<th>Description</th>
<th>Average additional travel</th>
<th>Average additional time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route 1</td>
<td>Via Elizabeth Street, Victoria Street and Cowpasture Road</td>
<td>1.1km</td>
<td>3.7 minutes</td>
</tr>
<tr>
<td>Route 2</td>
<td>Via Cowpasture Road and Restwell Road roundabout</td>
<td>2.4km</td>
<td>4 minutes</td>
</tr>
</tbody>
</table>
Figure 3-5 Alternate access route 1
Source: Roads and Maritime, 2018

Figure 3-6 Alternate access route 2
Source: Roads and Maritime, 2018
3.3 Businesses located at 1 & 2 Cowpasture Place

This site is located on the north-eastern corner of The Horsley Drive and Cowpasture Road. The site is industrial/commercial and includes businesses that provide manufacturing, wholesale retail, transport, construction, maintenance services and self-storage services.

While access to the site is not expected to change as a result of the proposal, this section provides an overview of the type of customers and delivery vehicles that visit the site to understand who may be impacted after exiting the site.

Of the 35 businesses surveyed in this BIA, 14 businesses were located at this site. These 14 represent approximately 70% of the total businesses located at 1 & 2 Cowpasture Place. As shown in Table 3-1, a good response rate was also achieved across the business types.

3.3.1 Overview of businesses

Of the 14 businesses surveyed, the most common types of businesses were retail (five), manufacturing (four), maintenance (three) and transport services (two).

![Figure 3-7 Types of services/products](image)

Note: Businesses were able to choose more than one answer for this question.

3.3.2 Information about the customer base

Type of customers

Three businesses received passing trade only, four businesses received appointments only, while four businesses received both. Two businesses did not answer this question.
Of the five businesses that received both passing trade and appointments, one business received a few appointments (0-25% of all customers), two businesses received some appointments (25-50%), two businesses received many appointments (50-75%), and four businesses received mostly appointments (75-100%) (Figure 3-9). Five businesses did not answer this question.

**Origin of customers and travel mode**

Most businesses (11) indicated that their customers come by car only, while one indicated that their customers come by public transport. Three businesses did not answer this question.

Five businesses stated that their customers come from the local area, eight businesses stated that their customers come from the surrounding areas, 11 businesses stated that their customers come from other parts of Sydney, while two businesses indicated that their customers come from outside of Sydney (Figure 3-10).
Busiest days and times for customers

Most businesses stated that their busiest days of the week for customers are Monday to Friday (between 9 and 12 businesses), while three businesses stated that Saturdays are their busiest day. Only one business indicated that Sunday is their busiest day. Two businesses did not answer this question.

Seven businesses stated that their busiest times of day for customers are between 7am to 11am. Eight businesses stated their busiest times are 11am to 2pm. Seven businesses indicated that their busiest times are 2pm to 5pm. One business did not answer this question.

Respondents who selected other include one business which stated that no customers visit the site because services are provided off-site only and the other stated not applicable.

3.3.3 Information about delivery vehicles

Ten businesses receive deliveries by truck. Nine businesses receive deliveries by van. Four businesses receive deliveries by truck with trailers. Three businesses receive deliveries by car. Three businesses stated that this question was not applicable.

Busiest days and times for delivery vehicles

Most businesses indicated that their busiest days of the week for deliveries are Monday to Friday (between 9 and 10 businesses). No businesses indicated that Saturday or Sunday was their busiest for deliveries. Three businesses indicated the question was not relevant to their operations.

Eight businesses indicated that their busiest times of the day for deliveries are between 7am to 2pm. Five businesses indicated that their busiest times are between 2pm to 5pm. Four businesses indicated that the question was not relevant to their operations.

Delivery access

Four businesses indicated that most of the delivery vehicles arrive and exit from the west on The Horsley Drive. Four businesses indicated that delivery vehicles arrived and exited equally from both directions. Five businesses said this was not applicable. Two businesses said that routes varied.
3.3.4 Exiting from the site

Vehicles that exit the site with the intention to travel west on The Horsley Drive currently take a U-turn at the roundabout. The proposed upgrade of the roundabout to an intersection with traffic lights would require vehicles exiting the site to travel west on The Horsley Drive to take alternate routes. Access to the site is not expected to change as a result of the proposal. The following section provides a review of the traffic data report in relation to the vehicles currently using the roundabout after exiting the site.

Vehicles using the roundabout after exiting the site

The traffic data report found that the majority of vehicles currently performing U-turn movements to the west on The Horsley Drive are approaching from the north on Cowpasture Road, particularly during the PM peak.

As shown in Table 3-4, the highest number of vehicles (48) using the roundabout after exiting the site is during the PM peak, followed by the midday off peak (34 vehicles) and the AM peak (eight vehicles). Similarly, the highest proportion of vehicles using the roundabout after exiting the site is during the PM peak (98%), followed by the midday off peak (97%) and AM peak (42%). Based on the traffic data report, there is an average of 15 vehicles per hour that travel to the site after using the roundabout.

Table 3-4 Number and proportion of vehicles using the roundabout after exiting the site

<table>
<thead>
<tr>
<th>Period</th>
<th>Number of vehicles using the roundabout after exiting the site</th>
<th>Proportion of vehicles using the roundabout after exiting the site</th>
</tr>
</thead>
<tbody>
<tr>
<td>AM (7am to 9am)</td>
<td>8 out of 19</td>
<td>42%</td>
</tr>
<tr>
<td>Midday off peak periods</td>
<td>34 out of 35</td>
<td>97%</td>
</tr>
<tr>
<td>(11am to 1pm)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PM (4pm to 6pm)</td>
<td>48 out of 49</td>
<td>98%</td>
</tr>
</tbody>
</table>

Source: SMEC, 2017

Based on the traffic data report, between 3,700 and 3,900 vehicles per hour pass through the roundabout during peak periods on a weekday. The number of vehicles using the roundabout after exiting the site therefore represents a small proportion of total traffic (between 0.1-0.6%).

Alternate route from the site

An alternate route from the site to the M7 Motorway is via Cowpasture Road and Restwell Road roundabout. This would require drivers to travel up to an additional 2.4km or four minutes. Figure 3-11 shows this route.
3.4 Business located at 1336 The Horsley Drive

The site at 1336 The Horsley Drive contains a retail florist and nursery. The site is located on the southern side of The Horsley Drive.

While access to the site is not expected to change as a result of the proposal, this section provides an overview of the type of customers and delivery vehicles that visit the site to understand who may be impacted after exiting the site.

3.4.1 Information about the customer base

The business surveyed indicated it receives both walk-in/passing trade and customers by appointment. The proportion of customers that come by appointment is estimated to be between 0 to 25%.

The business indicated that 98% of their customers come by car with the remainder coming by public transport. Customers come from the local and surrounding area. The business indicated that their busiest days of the week for customers are Monday to Saturday. They stated that they receive customers throughout the day.

3.4.2 Information about delivery vehicles

The business indicated that their busiest days of the week for deliveries are Monday to Friday throughout the day. Delivery vehicles include cars and vans.

3.4.3 Exiting from the site

Drivers that wish to travel to the east on The Horsley Drive currently travel west on The Horsley Drive and take a U-turn at the roundabout. The proposed upgrade of the roundabout to an intersection with traffic lights means vehicles wishing to travel east on The Horsley Drive would
need to take alternate routes. Access to the site is not expected to change as a result of the proposal. The following section provides a review of the traffic data report in relation to the vehicles currently using the roundabout after exiting the site to travel to the east on The Horsley Drive.

**Alternate routes from the site**

Two alternate routes from the site are outlined in Table 3-3. These routes would require drivers to travel up to an additional 2.4km or four minutes. These are shown in Figure 3-12 and Figure 3-13.

**Table 3-5 Alternate access routes to the site**

<table>
<thead>
<tr>
<th>Alternate access routes</th>
<th>Description</th>
<th>Average additional travel</th>
<th>Average additional time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route 1</td>
<td>Via Cowpasture Road, Victoria Street and Elizabeth Street</td>
<td>1.1km</td>
<td>3.7 minutes</td>
</tr>
<tr>
<td>Route 2</td>
<td>Via Cowpasture Road and Restwell Road roundabout</td>
<td>2.4km</td>
<td>4 minutes</td>
</tr>
</tbody>
</table>

Source: Roads and Maritime, 2018

**Figure 3-12 Alternate route 1**

Source: Roads and Maritime, 2018
Figure 3-13 Alternate route 2

Source: Roads and Maritime, 2018
4. Business impact assessment

This section presents an overall assessment of the potential impacts on businesses located across the three sites, based on the outcomes of the business and customer surveys, and the data from the traffic impact assessment. Each site is discussed separately.

4.1 Businesses located at 1353, 1357 and 1345 The Horsley Drive

4.1.1 Customers and revenue

Some customers wanting to access this site would need to take an alternate route. Two potential alternate routes are identified in Section 3.2.4. This would mean a potential increased travel distance of 1.1km (around 3.7 minutes) or 2.4km (around four minutes) respectively.

Based on the business survey, this could potentially increase travel for most customers to five businesses, and around half of customers to six businesses. It is noted that the busiest times of day for customers are 11am to 2pm, followed by 7am to 11am. This is reflected in the traffic data report, where the highest number of vehicles accessing the site after using the roundabout is during the midday off peak.

Twelve businesses believe the proposal will deter customers from accessing their business, and five of these believe that current customers will not continue to visit. Businesses at this site receive some customers by appointment and provide wholesale retail services, automotive services, manufacturing and recreation services. Given the existing cluster of industrial/commercial uses at this site and the specialist products and services offered at some of these businesses, some customers are more likely to plan their visit ahead, rather than drop in unplanned.

In total, 41 customers were surveyed at this site. Nine of these customers visited four of the twelve businesses that considered the proposal would deter customers. This included two retail and two recreation businesses. It is noted that of the nine customers, four came from the south on Cowpasture Road, while three came from the west on The Horsley Drive, one came from the north on Cowpasture Road and one from the east on The Horsley Drive.

Customers who visited for personal reasons stated they visit weekly, while customers who visited for business purposes tended to visit the business daily.

Overall, the majority of customers (78% or 32) surveyed at this site considered that they would continue to visit the businesses at the site if the proposal was implemented. Six customers (15%) said that they would not continue, due to the additional travel required to visit the site. Twenty-two of the 24 customers who visited for personal reasons stated that they would continue to visit if the proposal was implemented. Nine of the 14 customers who came for business purposes would continue to visit. Customers who stated they would not continue to visit the business primarily visited for business purposes (five) and one visited for personal purposes.

Results were similar for customers visiting the businesses for retail purposes, with nine out of the 11 respondents stating they would continue to visit the business. Similarly, eight out of nine customers visiting for recreational purposes stated they would continue to visit the business. Due to the nature of the recreation facility which receives appointments only, it is unlikely that most of its customers would be deterred from visiting the business after the proposal is implemented.
Although several businesses felt the proposal would deter customers, the majority of customers surveyed indicated they would continue to visit the site despite an increase in travel time. In addition, many of the businesses are of a specialist nature, with customers likely to plan their visit and therefore continue to access the businesses as required.

Three businesses that rely on walk-in/passing trade for their customer base perceive that the proposal would deter customers. These businesses provide retail services. Customers of this nature who are travelling from the east on The Horsley Drive may be deterred from accessing the businesses due to the loss of the roundabout and the need to travel via an alternate route. These retail businesses may therefore lose some customers and revenue. It is noted that none of the customers surveyed were visiting these particular businesses.

4.1.2 Delivery vehicles

The proposal would require delivery trucks travelling from the east on The Horsley Drive to travel via alternate routes to access the businesses at this site. Based on the business survey, this could potentially increase the travel of delivery vehicles to eight businesses. Based on the traffic data report, the proposal may affect the access of a very small number of heavy vehicles currently taking U-turn movements at the roundabout (around one to three vehicles per hour). However it is noted that these would be scheduled deliveries, and therefore trucks would continue to access the businesses to meet their service delivery.

4.2 Businesses located at 1 & 2 Cowpasture Place

4.2.1 Customers and revenue

Customers exiting this site with the intention to travel west on The Horsley Drive or north on Cowpasture Road would be required to take an alternate route, such as the one described in Section 3.3.4. Based on this route, it would result in a potential increased travel distance of 2.4km or four minutes for customers exiting the site. The existing arrangement of customers exiting the site to other directions, such as east on The Horsley Drive or south on Cowpasture Road, is not expected to change as a result of the proposal.

Based on the business survey, six businesses said that their customers come equally from both directions along The Horsley Drive. Additionally, five businesses said most of their customers travel from the west along The Horsley Drive. It is likely that these customers exit in the same direction that they arrived. Based on this, the proposal could potentially increase travel for those customers. The businesses considered the busiest times of day for their customers is between 7am to 5pm.

Access to the site is not expected to change as a result of the proposal. The proposal would, however require vehicles exiting the site to the west on The Horsley Drive towards the M7 Motorway to take alternate routes.

Six businesses believe that the proposal would deter customers from visiting their business. Three of these businesses also believe that their current customers would not continue to visit. It is noted that five of these businesses receive varying numbers of customers by appointment, and provide services such as wholesale retail services, broadcasting, transport and manufacturing. Given the existing cluster of industrial/commercial uses at this site and the specialist products and services offered at these businesses, customers are more likely to plan ahead to intentionally visit, rather than stop in for an unplanned visit.

In total, 13 customers were surveyed at this site. Seven customers were surveyed visiting the self-storage business within the site. The self-storage business felt unsure as to whether the proposal would deter customers. Of the seven customers, five considered that they would continue to visit the business if the proposal was implemented. Three of these customers came
from the south on Cowpasture Road, while one came from the west on The Horsley Drive and one came from the north on Cowpasture Road.

Two customers considered that they would not continue to visit, due to additional travel required after exiting the site. One of these customers exited to the east on The Horsley Drive and the other to the south on Cowpasture Road. As discussed above, access to these directions would not change as a result of the proposal however there may be perceived access issues due to construction. Overall, due to the nature of the self-storage business, it is considered that most customers would continue to visit this type of business within the site following the proposal implementation.

Overall, 10 of the 13 customers surveyed at this site considered that they would continue to visit the businesses at the site if the proposal was implemented. The remaining three customers said that they would not continue, due to additional travel required once they exited the site.

One business relies on walk-in/passing trade only, which provides retail services. Given access to the site is not expected to change as a result of the proposal, it is unlikely that the potential increase in travel distance to head west or north after exiting the site would deter their customers from accessing the business.

Based on this, in addition to the specialist type of businesses located at the site, it is unlikely that the potential increase in travel distance for some customers exiting the site to travel west or north would deter most of their customers from visiting the business.

### 4.2.2 Delivery vehicles

Access to the businesses for delivery vehicles would not change as a result of the proposal. However, delivery vehicles exiting this site to travel to the west on The Horsley Drive or travel north on Cowpasture Road would need to use alternate routes. Based on the traffic data report, the proposal may affect a very small number of heavy vehicles currently taking U-turn movements at the roundabout (around one to three vehicles per hour). Given that deliveries are scheduled, delivery vehicles exiting to the west or north are likely to plan their journey ahead to meet their schedules.

### 4.3 Business located at 1336 The Horsley Drive

#### 4.3.1 Customers and revenue

Customers wanting to exit this site and head east on The Horsley Drive would be required to take an alternate route. Two routes are described in Section 3.4.3. This would result in a potential increase in travel distance of up to 2.4km or four minutes. The existing arrangement for customers exiting the site to other directions, such as west on The Horsley Drive or north/south on Cowpasture Road, is not expected to change the route as a result of the proposal.

Based on the business survey, the business said that their customers come equally from both directions along The Horsley Drive. As a result, the proposal could potentially increase the travel of around half of their customers if they want to return in the same direction they came from.

The business believes that the proposal will deter customers from accessing their business, including their existing customers. Given the type of specialist products and services offered at the business (nursery and farming activity) and that it receives some appointments (0-25% of all customers), it is likely that customers would plan ahead to intentionally visit the business. It is noted that access to the site is not expected to change as a result of the proposal. The proposed upgrade of the roundabout to an intersection with traffic lights would mean vehicles wishing to travel to the east on The Horsley Drive would need to take alternate routes.
Seven of the 11 customers surveyed at this site considered that they would continue to visit the business if the proposal was implemented. Three customers said they would not continue to visit, due to additional travel. Based on this, it is unlikely the potential increase in travel distance would deter most of their customers from accessing the business.

### 4.3.2 Delivery vehicles

Access to the businesses for delivery vehicles would not change as a result of the proposal. Based on the business survey, the business said that most of their delivery vehicles leave to the west on The Horsley Drive. However, a small proportion of deliveries vehicles exiting to the east may need to use alternate routes and could potentially experience an increase in travel time. Based on the traffic data report, this may affect a very small number of heavy vehicles currently taking U-turn movements at the roundabout (around one to three vehicles per hour). It is noted that these would be scheduled deliveries, and therefore trucks would continue to access the business to meet their service delivery needs.

### 4.4 Summary of impacts

In summary, the proposal may result in potential business impacts, including:

- Increased travel distances for some customers and deliveries accessing the sites at 1353, 1357 and 1345 The Horsley Drive, and exiting the sites at 1 & 2 Cowpasture Place and 1336 The Horsley Drive. Customers and delivery vehicles would need to use alternate access routes within the local area. For drivers accessing the sites at 1353, 1357 and 1345 The Horsley Drive from the east, this would potentially increase the travel distance by 1.1km (around 3.7 minutes) or 2.4km (around four minutes). For drivers leaving 1 & 2 Cowpasture Place within the intention to travel west and 1336 The Horsley Drive with the intention to travel east, this would potentially increase the travel distance by up to 2.4km or around four minutes.

- Based on traffic data report, the proposal would affect the access of a very small number of heavy vehicles currently taking U-turn movements at the roundabout (one to three vehicles per hour). However, it is noted that deliveries are likely to be scheduled, so trucks would therefore continue to access the businesses to meet their service delivery needs.

- Increased travel may deter some customers from visiting businesses at the three sites, particularly those that rely on walk-in/passing trade only (19% or six of the 35 businesses surveyed). The businesses that receive walk-in/passing trade were predominantly retail services. This is more likely to occur for businesses located at 1353, 1357 and 1345 The Horsley Drive, due to changed access for customers travelling to these businesses. This is likely to result in some loss of customers and revenue to these businesses.

- The majority of customers surveyed (75% or 49 out of 65 customers) stated they are likely to continue to visit the businesses, particularly given the specialist products and services provided by many of the businesses and existing cluster of industrial/commercial uses at the sites. These include wholesale retail services, automotive services, broadcasting, transport, manufacturing and recreation services. These businesses also receive varying numbers of their customers by appointment. It is therefore unlikely that the potential increase in travel distance for some customers would deter most of the customers from accessing these businesses. However there is still potential for the specialised businesses to lose some customers and revenue, due to the changed access and additional travel required.

- Some customers whose access would not be changed by the proposal based on their direction of travel reported in the customer survey said that they would not continue to
visit the business. There is potential for some customers to perceive impacts to their access during construction and operation, and be deterred from visiting businesses. It is unlikely that the proposal would deter most of these customers, given the specialist types of businesses and existing cluster of industrial/commercial uses within the sites.

- It is noted that access to the sites at 1 & 2 Cowpasture Place and 1336 The Horsley Drive is not expected to change as a result of the proposal. Increased travel would potentially affect customers leaving to the east (from 1336 The Horsley Drive) and west and north (from 1 & 2 Cowpasture Place). Therefore, these businesses are less likely to be impacted. Based on the customer survey results, it is unlikely that the potential increase in travel distance would deter most of their customers from visiting the businesses. However, there is still potential that some businesses may lose some customers and revenue, due to the changed access and additional travel required when leaving the businesses.
5. **Strategies to address business impacts**

Businesses were invited to share their thoughts on our suggested strategies, which would be considered to minimise any loss of customers as a result of the proposal. Overall, 14 businesses indicated that they would like to receive information sheets from Roads and Maritime to assist their customers with alternative routes to their business. Fifteen businesses did not think this would be useful, and one business indicated that it might be useful.

Based on consultation with the businesses, the following strategies are recommended for the potential implementation by the businesses and Roads and Maritime to address business impacts arising from the proposal:

- Inform customers early about any construction work and available alternate access routes. Communication could be via the business website, social media, email distribution, advertising and leaflets.
- Ensure staff are informed about alternate access routes to assist customer travel to and from the businesses.
- Post signage to help customers, staff and delivery vehicles to access the businesses.

To ensure that businesses can provide up-to-date information to their customers, staff and delivery vehicles, ongoing consultation is recommended with businesses at the three sites. This should include project updates about timing of construction work and changed access. This should provide sufficient time for the businesses to inform their customers and deliveries about access changes.
6. **Conclusion**

The proposal involves upgrading The Horsley Drive between the M7 Motorway to Cowpasture Road, including the upgrade of the roundabout at The Horsley Drive and Cowpasture Road (southern section) to an intersection with traffic lights to improve traffic flow.

As a result of the proposal, some customers accessing the site at 1353, 1357 and 1345 The Horsley Drive, and exiting the sites at 1 & 2 Cowpasture Place and 1336 The Horsley Drive will need to travel additional distances. These customers would need to travel up to an additional 2.4km or around four minutes via alternate routes in the surrounding road network. This potential change in traffic conditions is likely to affect customers and particularly businesses that rely on walk-in/passing trade.

While a representative sample of businesses were surveyed at 1 & 2 Cowpasture Place (70% of businesses) and at 1336 The Horsley Drive (100% of businesses), 29% of businesses surveyed at 1353, 1357 & 1345 The Horsley Drive is not considered representative. However, the findings of this BIA are supported by the additional data generated through the 41 customers surveyed at this site.

Based on the outcomes of the business impact assessment, it is likely that most customers will continue to visit the businesses across the three sites, given the existing cluster of industrial/commercial uses, availability of specialist products and services at some businesses, and the fact that some receive a large proportion of customer appointments. It is therefore unlikely that the potential increase in travel distance would deter most of the customers from visiting these businesses.

Overall, there is potential for customers to perceive impacts to their journey during construction and operation, and be deterred from visiting the businesses, regardless of whether their access is changed. Notifications and signage are therefore important in communicating road changes to these customers. It is unlikely that the proposal would deter most of these customers, given the specialist types of businesses and existing cluster of industrial/commercial uses within the sites.

With timely and ongoing consultation between Roads and Maritime and the businesses, it is expected that most impacts would be reduced; ultimately, the proposal is not expected to impact the overall viability of the businesses surveyed. This consultation should include project updates about timing of construction work and changed access. This should provide sufficient time for the businesses to inform their customers and deliveries about access changes. Businesses could also implement strategies to address potential impacts, including providing communications about alternate access routes on their website, social media, email distribution, advertising and leaflets. They could also ensure that their staff are informed about alternate access routes to assist customer travel as well as signage.
Appendix A – Business survey
The Horsley Drive Upgrade - Business survey

Roads and Maritime Services has proposed to upgrade The Horsley Drive between Wallgrove Road to Cowpasture Road. The proposal includes:

- A four lane divided road between the M7 Motorway and Cowpasture Road with a wide central median to allow for six lanes in the future
- Upgrade of the roundabout at The Horsley Drive and Cowpasture Road (southern section) to an intersection with traffic lights to improve traffic flow
- Upgrade of the Ferrers Road intersection and Cowpasture Road north intersection
- An extra eastbound lane from west of Ferrers Road to Cowpasture Road
- A pedestrian and cyclist shared path along The Horsley Drive, connecting to the Western Sydney Parklands cycleway.

To inform the submissions report, we are surveying businesses to understand the potential impacts from the proposal. We would like to invite you to complete this survey to understand the nature of your business, and your views on how the proposal could impact your business.

The survey will close on Wednesday 21 March 2018. All of the information you provide will be strictly confidential and will only be used to assist in understanding the impacts of the proposal on local businesses.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Date of survey</td>
</tr>
<tr>
<td>2</td>
<td>Business name</td>
</tr>
<tr>
<td>3</td>
<td>Address of business</td>
</tr>
<tr>
<td>4</td>
<td>What type of services or products does this business provide?</td>
</tr>
<tr>
<td>5</td>
<td>Are you the business owner or manager?</td>
</tr>
<tr>
<td>6</td>
<td>Contact details</td>
</tr>
<tr>
<td>7</td>
<td>Is your business a franchise?</td>
</tr>
<tr>
<td>8</td>
<td>How long have you been operating this business?</td>
</tr>
<tr>
<td>9</td>
<td>How many employees do you have?</td>
</tr>
<tr>
<td></td>
<td>Question</td>
</tr>
<tr>
<td>---</td>
<td>--------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>10</td>
<td>Which days of the week are your busiest for customers?</td>
</tr>
<tr>
<td>11</td>
<td>What are the busiest times of the day for customers?</td>
</tr>
<tr>
<td>12</td>
<td>What type of customers do you mainly receive on a daily basis?</td>
</tr>
<tr>
<td>13</td>
<td>If customers come by appointment, what proportion of your daily customers come by appointment?</td>
</tr>
<tr>
<td>14</td>
<td>How do your customers travel to your business?</td>
</tr>
<tr>
<td>15</td>
<td>What proportion of your daily customers use the following transport modes to visit your business?</td>
</tr>
<tr>
<td>16</td>
<td>Where do your customers come from?</td>
</tr>
<tr>
<td>17</td>
<td>From which direction do your customers come from?</td>
</tr>
<tr>
<td></td>
<td>Question</td>
</tr>
<tr>
<td>---</td>
<td>--------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
|18 | Which days of the week are your busiest for deliveries?                  | - Monday  
- Tuesday  
- Wednesday  
- Thursday  
- Friday  
- Saturday  
- Sunday  
- Not applicable |
|19 | What are the busiest times of the day for deliveries?                    | - 7am to 11am  
- 11am to 2pm  
- 2pm to 5pm  
- 5pm to 9pm  
- After 9pm  
- Not applicable |
|20 | What type of delivery vehicles come to your business?                   | - Cars  
- Vans  
- Trucks  
- Trucks with trailers  
- Not applicable  
- Other _______ |
|21 | From which direction do the delivery vehicles come from?                | - Some come from the east on The Horsley Drive  
- Most come from the east on The Horsley Drive  
- Some come from the west on The Horsley Drive  
- Most come from the west on The Horsley Drive  
- Equally from both directions  
- Not applicable  
- Other _______ |
|22 | How do delivery vehicles exit your business site?                       | - Some leave to the east on The Horsley Drive  
- Most leave to the east on The Horsley Drive  
- Some leave to the west on The Horsley Drive  
- Most leave to the west on The Horsley Drive  
- Equally in both directions  
- Not applicable  
- Other _______ |
|23 | Do you think the upgrade of the Cowpasture Road roundabout at The Horsley Drive to an intersection with traffic lights would deter customers from accessing your business? | - Yes  
- No  
- Maybe |
|24 | Do you think your current customers will continue to visit your business if the proposal is implemented? | - Yes  
- No  
- Maybe |
|25 | What proportion of your daily customers do you think you might lose as a result of the proposal? If yes, what alternate route would customers take? | - None  
- 0-5%  
- 5-10%  
- 10-15%  
- 15-20%  
- >20%  
- Unsure |
<table>
<thead>
<tr>
<th></th>
<th>Question</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>26</td>
<td>What proportion of your daily revenue do you think you might lose as a result of the potential loss of customers?</td>
<td>None</td>
</tr>
<tr>
<td>27</td>
<td>How would you rate this impact on your business?</td>
<td>None</td>
</tr>
<tr>
<td>28</td>
<td>What strategies would your business consider to minimise any loss of customers as a result of the proposal?</td>
<td>None</td>
</tr>
<tr>
<td>29</td>
<td>Would it be useful for RMS to provide you with an information sheet to assist your customers with alternate routes to access your business?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Thank you for taking the time to participate in this survey. Once you have completed your survey, please return by **Wednesday 21 March 2018** by either:

- **Mail:**
  GHD Stakeholder Engagement Team  
  Level 15, 133 Castlereagh St  
  Sydney NSW 2000
- **Email:**
  community.input@ghd.com
Appendix B – Customer survey
The Horsley Drive Upgrade – Customer survey

<table>
<thead>
<tr>
<th>Introductory text</th>
<th>Hi I am ______________________ from GHD. On behalf of Roads and Maritime Services, we are doing a quick survey of customers visiting businesses along The Horsley Drive. The information from the survey will be used to assist in understanding the impacts to businesses from a proposed upgrade to The Horsley Drive. Can I please have a few minutes of your time to go through a few questions.</th>
</tr>
</thead>
</table>

*Allow to tick multiple answers for all multiple choice questions*

<table>
<thead>
<tr>
<th>Date of survey</th>
<th>Day of the week</th>
<th>Time of day</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>□ Morning (8am to 12 noon)</td>
<td>□ Roundabout at the Cowpasture Road and The Horsley Drive intersection</td>
</tr>
<tr>
<td></td>
<td></td>
<td>□ Lunch time (12 noon to 2pm)</td>
<td>□ Northern side of The Horsley Drive</td>
</tr>
<tr>
<td></td>
<td></td>
<td>□ Afternoon (2pm to 4pm)</td>
<td>□ Southern side of The Horsley Drive</td>
</tr>
<tr>
<td></td>
<td></td>
<td>□ Evening (4pm to 8pm)</td>
<td></td>
</tr>
</tbody>
</table>

1. Which suburb do you live in?  
2. Purpose of your visit:  
   □ Personal  
   □ Business  
3. Which businesses have you visited or intend to visit here?  
4. How often do you visit businesses here?  
   □ Daily  
   □ Weekly  
   □ Monthly  
   □ Every few months  
   □ Every year  
   □ Seldom  
5. Which direction did you travel from to get here?  
   □ From the east on The Horsley Drive e.g. Smithfield  
   □ From the west on The Horsley Drive e.g. M7, Horsley Park  
   □ From the north on Cowpasture Road  
   □ From the south on Cowpasture Road  
   □ Other ____________  
6. Which direction will you leave from?  
   □ To the east on The Horsley Drive  
   □ To the west on The Horsley Drive  
   □ To the north on Cowpasture Road  
   □ To the south on Cowpasture Road  
   □ Other ____________  
7. The roundabout at Cowpasture Road and The Horsley Drive (near the entrance to the Western Sydney Parklands) is proposed to be upgraded to a traffic light.  
   □ Yes  
   □ No
<table>
<thead>
<tr>
<th></th>
<th>Did you use this roundabout to turn around to get here?</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>(prompt for surveyor to show a map of alternate routes and travel times and distance)</td>
<td>☐ Yes  ☐ No</td>
</tr>
<tr>
<td></td>
<td>If you needed to take an alternate route, would you continue to visit these businesses?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Why?</td>
<td></td>
</tr>
</tbody>
</table>
Appendix C – Survey findings

Businesses located at 1353, 1357 and 1345 The Horsley Drive

This section summarises the results of the business survey and customer survey, related to the businesses at 1353, 1357 and 1345 The Horsley Drive.

Perceived impacts of the businesses

Perceived impact to customers accessing the site

As seen in Figure 7-1, of the 20 businesses surveyed, eight businesses indicated that their customers travel equally from both directions along The Horsley Drive. Another seven indicated that most of their customers come from the east. Three businesses indicated that most of their customers come from the west.

![Figure 7-1 Customer access routes](image)

Note: Businesses were able to choose more than one answer for this question.

Twelve businesses believe that the proposal will deter customers from accessing their business, and the remainder (seven) consider that the proposal may deter customers. One respondent did not answer this question. Of these businesses, respondents stated that most (six) and some (three) of their customers come from the east on The Horsley Drive. Three said that their customers come equally from both directions, and two said most come from the west and three some from the west.
Six respondents believe that their customer will continue to visit their business if the proposal is implemented. Seven businesses are unsure, while five businesses believe their customers will continue to visit their business. Of those businesses who believe customers would not or might not continue to visit their business, the majority state that their customers arrive from the east, as shown in Figure 7-3.

**Figure 7-2 Businesses that considered the proposal would deter customers by direction of customer travel**

Note: Businesses were able to choose more than one answer for this question.

**Figure 7-3 Businesses that considered their current customers would continue to visit by direction of customer travel**

Note: Businesses were able to choose more than one answer for this question.
**Perceived impact on customers and revenue**

Thirteen businesses estimated that they would lose daily customers and revenue as a result of the proposal. Of these businesses, ten indicated that they would lose over 20% of their daily customers. One business estimated they would lose 5-10% of their revenue and two estimated they would lose 0-5%. Five respondents were unsure if they would lose any customers, one stated they expect to lose no customers and one business did not respond.

The responses regarding the estimated loss in revenue reflect the perceived loss in daily customer base; however, one respondent stated that they expect to lose 15-20% of their daily revenue, reducing the number of respondents who expect to lose >20% of their revenue to nine.

Eleven businesses considered that the proposal would result in a major impact on their business. Three businesses felt that the proposal would result in a moderate impact. One considered that the impact would be minor. Three respondents were unsure of the level of impact they would receive. One believed the proposal would have no impact and one respondent did not respond.

![Figure 7-4 Perceived impacts on businesses](image)

**Results of the customer survey**

In total, 41 customers were surveyed visiting businesses within this site, with 25 surveyed on a weekday and 16 on a weekend. Around half (22) came from the local area. Seven customers came from surrounding areas, including Blacktown, Liverpool, Austral and Hoxton Park. Four customers came from other parts of Sydney, including Campbelltown, Penrith, Harrington Park and Revesby. Eight customers did not answer this question.

![Figure 7-5 Origin of customers](image)

Note: Respondents were able to choose more than one answer for this question.
**Purpose and frequency of visit**

Just over half of customers (24) visited the site for personal reasons. Sixteen customers visited for business purposes, while one customer visited for both.

![Figure 7-6 Reason for visit](image)

The most common businesses that customers intended to visit were a retail services (14), construction (three), and recreation (1). Three respondents did not state what business they were visiting.

![Figure 7-7 Types of businesses that customers intended to visit](image)

Of the customers surveyed, around half (22) visited weekly, while 16 visited daily. Four customers visited once a month or less.
Customers came from different directions, including from the east (9) and west (10) on The Horsley Drive, and from the north (9) and south (14) on Cowpasture Road. One customer stated that they travelled from all directions throughout the day due to business purposes. Thirty-two respondents stated that they used the roundabout to access to the site on the day of their visit.

Customers also intended to leave the site in different directions, including to the east (15 customers) and west (5 customers) on The Horsley Drive, and to the north (7 customers) and south (14 customers) on Cowpasture Road. One customer stated that they would continue shopping in the local area, so they were unsure which direction they would leave.
Perceived impact on customer visits

Of the 41 customers surveyed, 32 said that they would continue to visit the businesses at the site if the proposal was implemented. Six customers said that they would not continue, due to additional travel. The remaining three customers did not answer this question.

Figure 7-10  Perceived impact on customer visits

Businesses located at 1 & 2 Cowpasture Place

This section summarises the results of the business survey and customer survey, related to the businesses at 1 & 2 Cowpasture Place.

Perceived impacts of the businesses

Perceived impact to customers exiting the site

Of the 14 businesses surveyed, six businesses indicated that most of their customers travel equally from both directions along The Horsley Drive. Five businesses indicated that most of their customers come from the west. One business indicated that most of their customers come from the east, and another indicated that some of their customers come from the west.

While access to the site is not expected to change as a result of the proposal, it is likely that customers exit in the same direction that they arrived.

Figure 7-11  Customer access routes

Note: Businesses were able to choose more than one answer for this question.
Six businesses believe the proposal will deter customers from visiting their business due to the potential impact to customers exiting the site, while another six believe that their customers will not be deterred by the proposal. Two businesses were unsure.

Businesses who believe their customers would be deterred stated that their customers come equally from both directions (three) and from the east on the Horsley Drive (three), who are likely to exit in the same direction that they arrived. The three businesses who were unsure of whether the proposal would deter their customers’ responses were evenly split across each response category; the west, east and equally in both directions. Those respondents who believe that the proposal will not deter their customers were more inclined to state their customers came from the west (two) or equally from both directions (two).

**Figure 7-12  Businesses that considered the proposal would deter customers by direction of customer travel**

Note: Businesses were able to choose more than one answer for this question.

**Perceived impact on customers and revenue**

Eight businesses consider that customers will still visit their business if the proposal is implemented, while two consider that customers will not visit, three were unsure and one respondent did not answer. Of those respondents who believe customers will still visit their business following the proposal, customers accessed the business equally from both directions (five), followed by mostly from the west (two) and sometimes from the west (one). Respondents who were unsure believe their customers primarily come from the west (two) and equally from both directions (one). Of the two respondents who believe their customers will not continue to visit their business following the proposal, one indicated the direction of customer travel (from the west).
Six businesses did not expect any loss of daily customers as a result of the proposal. Seven businesses did not expect any loss of daily revenue. One respondent expected 0-5% reduction in customer base / revenue, two respondents expect 5-10% reduction in customer base, and one respondent expects a 5-10% reduction in revenue. One respondent expects a 15-20% reduction in customer base / revenue. Four respondents were unsure of the impact on customer base / revenue. Overall, almost half of the respondents believe they will not see a reduction in their customer base, and half do not expect to see a reduction in overall revenue.

**Results of the customer survey**

In total, 13 customers were surveyed visiting businesses at this site with seven on a weekday and six on a weekend. Six customers came from the local area, including Smithfield, Wetherill Park, Cecil Hills, Fairfield West and Horsley Park. Three customers came from surrounding areas, including Liverpool, Macquarie Links and Mount Druitt. One customer from Eastern Sydney. Three customers did not answer this question.
Purpose and frequency of visit

Nine of the 13 customers visited the site for personal reasons, while the remaining four visited for business purposes. Seven customers were intending to visit the self-storage business. One customer intended to visit the transport business. Two customers intended to visit an electrical infrastructure business, while one intended to visit an engineering service. Two customers did not answer this question. Two customers visited daily, five of the 12 customers visited weekly, and three visited monthly. Two visited daily. Three visited once every few months or less. Business customers visited either every few months (one) or weekly (three). The remaining customers who visited for personal reasons were relatively evenly spread across daily, weekly, monthly, and seldom visits.

**Figure 7-15**  
Reason for visit

**Figure 7-16**  
Types of businesses that customers intended to visit
Customers came from different directions, including from the east (five) and west (three) on The Horsley Drive, and from the north (two customers) and south (three) on Cowpasture Road. Customers also intended to leave the site in different directions, including to the east (two) and west (five) on The Horsley Drive, and to the north (two) and south (four) on Cowpasture Road. Based on this, it is expected that five customers intended to take a U-turn at the roundabout of The Horsley Drive and Cowpasture Road in order to leave to the west on The Horsley Drive or north on Cowpasture Road. It is noted that of three of the four customers that visited for business purposes, left to the west on The Horsley Drive while one customer left to the south on Cowpasture Road. In comparison, the customers visiting businesses for personal reasons were more likely to exit to the all directions on The Horsley Drive and Cowpasture Road in equal proportions.
Perceived impact on customer visits

Ten of the 13 customers considered that they would continue to visit the businesses at the site if the proposal was implemented. The remaining three customers considered that they would not continue, due to additional travel.

![Perceived impact on customer visits](image)

**Business located at 1336 The Horsley Drive**

This section summarises the results of the business survey and customer survey, related to the business at 1336 The Horsley Drive.

**Perceived impacts of the business**

**Perceived impact to customers exiting the business**

The business indicated that their customers travelled equally from both directions, originating from both the local and surrounding area. While access to the site is not expected to change as a result of the proposal, it is likely that customers exit in the same direction that they arrived.

The business believes that the proposal will deter customers from visiting their business due to the potential impact to customers exiting the site. The business is unsure if their current customers will continue to visit if the proposal is implemented.

**Delivery access**

The business surveyed indicated that their deliveries are received by cars and vans. The business indicated that most of the delivery vehicles that service their business come from and exit to the west on The Horsley Drive.

**Perceived impact on customers and revenue**

The business surveyed considered that the implementation of the proposal would result in a major impact on their business. The business has estimated that they would lose between 15-20% of its daily customers and between 15-20% of its daily revenue.
Results of the customer survey

In total, 11 customers were surveyed visiting this business with five on a weekday and six on a weekend. Six customers were from the local area, including Bossley Park, Abbotsbury, Smithfield, St Johns Park and Wetherill Park. Two customers were from the surrounding area, including Heckenberg and Middleton Grange. Two customers were from other parts of Sydney. One customer travelled from the Hunter Valley.

Figure 7-20   Origin of customers

Purpose and frequency of visit

Most customers (10) visited the business for personal reasons. One customer visited for business purposes. Three customers visited the business daily. Three customers visited the business weekly. Two customers visited the business every few months. One customer visited every year, while another rarely visited.

Figure 7-21   Frequency of visits
Customers travelled from different directions, including from the east (three) and west (two) on The Horsley Drive, and from the north (two) and south (four) on Cowpasture Road.

![Direction of customer travel](image1)

Customers also intended to leave the site in different directions, including to the east (one) and west (one) on The Horsley Drive, and to the north (four) and south (four) on Cowpasture Road. One customer stated that they would be travelling to the city however did not provide a direction. Based on this, it is expected that one customer intended to take a U-turn at the roundabout of The Horsley Drive and Cowpasture Road in order to leave to the east on The Horsley Drive.

![Direction of customer departure](image2)
Perceived impact on customer visits

Seven of the 11 customers considered that they would continue to visit the business. Three customers said they would not continue to visit, due to additional travel when exiting. One customer did not answer this question.

Figure 7-24   Perceived impact on customer visits
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