

PART 3 The Shire's economy; development review

3.1 Generally

Temora Shire is part of the Eastern Riverina Region in southern New South Wales. The Shire's economic base is dominated by agriculture, with winter cereals such as wheat, canola, oats, barley and lupins complemented by the production of cattle, sheep and pigs. Other enterprises include olives, honey processing, deer and ostrich farming. The main employment sectors in the region are agriculture, health, education, community services, retailing (13 %) and manufacturing (11%). Employment in tourism is negligible.

The potential contribution of the Aviation Museum and airport facility is difficult to predict but together these two attractions are generally viewed as major economic resources for the town and Shire. Current estimated gross development value at the Airport for the period 2004-12 is approximately \$25m.

3.2 Economic profile of the Shire

Grain crops and livestock production are the mainstays of the Shire's economy. In 2002, the total value of seed and grain crops (excluding pastures and grasses) was \$35.98 m; livestock production including animals for slaughter generated \$ 18.8m. Other crops produced a return of \$9.35m. In employment terms, agriculture accounted for 24% of the jobs, with other important sectors being retailing (13.8%), property and business services (6.2%), education (7.6%), and health and community services (8.9%).

The Shire is also the focus of active mineral exploration campaigns for copper and gold.

The Shire's population has increased from 6131 in 1996 to an estimated 6340 in 2003 - a movement which was against the trend for most inland rural LGA's in the comparable population category.

In specific terms, the economy of the Shire relies on the following major sectoral activities:

- agriculture and livestock production, including cropping grains, hay production, oilseeds, sheep,
- cattle (including feed-lots), pigs, (including intensive piggeries), horse breeding for stock-work and equestrian sport;
- farm machinery sales, service, stock and station agencies, agronomist and veterinary services;
- state and federal government agencies;
- recreational aviation;
- primary, secondary and TAFE education;
- local government and Goldenfields Water supply authority; banking, accounting and legal services, real estate;
- health professionals;
- Police and emergency services.

All these sectors are interrelated. Farmers buy food and equipment from business in town. Farmers man the Rural Fire Service trucks. Farmers' children attend town schools and use town libraries. Farming families are active in committee work across the entire community. Farmers hire town-based tradespeople and rely on town-based health professionals, accountants and lawyers. These inter-relationships help towards an understanding of the 'organic' nature of the Shire's economy and the need for policies which (for example) encourage rather than discourage farmers to 'stay on the land': when a farming family quits, the entire community can be affected.

In recent years the Council has been proactive in stimulating and supporting local and regional economic development. In 2002 an Economic Development officer was appointed, leading to the

formation of the "Advance Temora" coalition of local interest groups and enterprises and the preparation of the Temora Main Street / Small Towns Strategy.

The Council is a partner in REROC, the Riverina Development Board, the Riverina Area Consultative Committee, Riverina Regional Tourism, and the Southern Special Economic Zone. Projects have included financing the establishment and operation of a medical centre; design, construction and sale of a dental surgery; creation of a development strategy for the aerodrome in partnership with the Aviation Museum; and the visionary efforts at Lake Centenary.

3.3 Recent development and building activity

Tables 3.3.1 and 2 provides statistics on development activity in the Shire over the past 5 years.

Table 3.3.1 Temora Shire: development activity and approvals 1999 - 2004

Item	99/00	00/01	01/02	02/03	03/04	04/05	Total
Residential subdivision - Number of lots	11	29	0	2	26	7	75
Rural res subdivision - number of lots	19	8	0	14	15	0	56
Rural subdivision - number of lots	9	5	9	6	11	18	58
Village 2(a) subdivision - number of lots	0	0	0	0	3	0	3
Industrial subdivision - number of lots	0	0	8	2	2	5	17
Commercial subdivision - number of lots	0	0	2	0	1	2	5
Special uses subdivision - number of lots	5	30	2	0	0	64	101
Strata title subdivisions - no of lots	0	3	3	10	9	6	31
Dwellings - incl units and dual occupancy	29	21	24	28	71	62	235
Industrial buildings	12	5	7	3	6	3	36
Commercial, business and retail buildings	3	3	2	7	6	4	25
Home businesses	1	2	2	3	1	2	11
Totals	89	106	59	75	151	173	653

Source: Temora Shire Council 2005

Table 3.3.2 Temora Shire: Dollar value - developments approved during period 1999-2005

period	Number of applications	Total \$ value
1999-2000	122	7,553,584
2000-2001	93	3,314,978
2001-2002	134	6,412,174
2002-2003	104	10,301,860
2003-2004	164	12,286,163
2004-2005	176	12,258,960
Totals	793	52,127,719

Source: Temora Shire Council 2005

The tables above reflect a healthy level of development and building activity in the Shire during a period in which the demographic statistics - taken alone - might suggest that the Shire was passing through a phase of virtually no growth. There will be a number of reasons for this theoretical discrepancy, including the fact that population statistics are only collected every five years.

3.4 Agriculture

NSW DPI has released estimates of crop yields for the decade 1995-2004 for the Temora Agronomy District (TAD). The figures cover wheat, barley, oats, canola, and other grain and cereal crops varieties. Because the TAD includes half of Coolamon Shire as well as the whole of Temora the statistics cannot be used to give an accurate indication of production in Temora alone. Notwithstanding this difficulty,

the following summary figures can be taken as a general indication of the yields of the principal local crops for the decade in question.

The TAD yield statistics provide an index of the quantum of local agricultural produce which has to be harvested, stored and transported to domestic and international markets. In Temora Shire, the logistics sector (comprising trucking companies, grain storage facilities, seed and fertiliser storage, rail infrastructure, and maintenance and other support services) is a vital component of the local economy and will remain so. Its needs will be reflected in the new LEP.

Table 3.4.1: Temora Agronomy District: Crop estimates 1995-2005

Crop	1995	2004
Wheat	Harvest area 100,000 ha Yield 300,000 tonnes Yield/ha 3 tonnes	Harvest area 93,000 ha Yields 158,100 t Yield / ha - 1.7 t
Barley	Harvest area 25,000 ha Yield 67,500 t Yield / ha - 2.7 t	Harvest area 28,000 ha Yield 47,600 t Yield / ha - 1.7 t
Oats	Harvest area 15,000 ha Yield 30,000 t Yield /ha - 2 t	Harvest area 5,000 ha Yield 7,000 t Yield / ha - 1.4 t
Canola	Harvest area 27,500 ha Yield 49,500 t Yield / ha - 1,8 t	Harvest area 26,000 ha Yield 16,900 t Yield / ha - 0.65 t

Source: Temora Agricultural Research and Advisory Station, 2005

On the basis of these figures it can safely be assumed that the Shire's reliance on agriculture will continue well into the future. Within the time-frame of local planning, major changes are most unlikely although the planned extensions to the new piggery at Moore Park in the far north of the Shire will bring additional jobs and revenue. Augmentation of grain handling and storage facilities will continue, especially in the vicinity of Temora town where easy access to road and rail infrastructure is available, along with support facilities in logistics, communications and office services.

Within the agricultural sector itself there may be shifts associated with local and overseas demand for new crop varieties; with technological change; and with political pressure for better management and protection of natural resources such as water, riverine habitats, landscape amenity, and native vegetation. The controversial issue of genetically modified crops is another factor of relevance.

These changes are difficult to predict. For planning purposes, the aim should be to ensure that a future LEP does not constrain the application of new ideas, new product ventures, or new cropping proposals. In more general terms, a new LEP should seek to facilitate the entry of new businesses and the expansion of existing ones throughout the Shire.

In the agricultural sector, other factors are at work here, aptly described by Barr [*Future agricultural landscapes, Australian Planner 2003*]. According to Barr, "the future of many small towns is insecure... ageing populations, with no replacement younger generation". He suggests that in many areas the greatest influence of urban environmental preferences on the agricultural sector "is in the high price of land in the more amenable and accessible parts of the rural landscape. Land that is close to major urban centres, has good views, is close to water or has a benign climate, attracts migrants from the town."

A consequence is that where demand for such land is high, land prices will rise - making it more expensive for local farmers to increase the scale of their operations in order to remain competitive. Barr also cites the reluctance of young males to enter full-time farming; the general ageing of the population; and the changing roles of women in the rural economy - all factors which are evident in Temora Shire. At the same time, of course, there are trends in Temora towards aggregation and greater efficiency in farm operations.

However, Barr also notes that “the landscapes of the broad acre cropping zone offer the greatest opportunities for farm businesses to keep ahead of declining terms of trade... the main agricultural advantage is not better soils or rainfall *but the lack of competition from other land purchasers.*”

In Temora Shire there is the growing urban magnet of Wagga Wagga to the south - possibly generating some of the ‘amenity demand’ to which Barr refers. Overall, however, it would seem that the demand for amenity farming is probably small and localised - pointing to the need in a local plan for some targeted controls over lot size, provision of services, and so on. Elsewhere throughout the bulk of the Shire, broad-acre agriculture will continue, largely unthreatened by the ‘hobby farm’ sector.

With regard to horse-breeding and the related equestrian sport industry, Temora remains a centre of excellence and continuing activity despite a downturn in the number of trotting and pacing events to be staged in the town. The future of this sector of the Shire’s economy is difficult to predict in an increasingly competitive commercial environment.

3.5 Forestry

The Shire contains three State Forests: Combaning (741 hectares), Narraburra (63ha), and Reefton (312ha). Whilst conservation is an important management objective in all three, Narraburra State Forest is dominated by white cypress which is a basic resource for the regional timber industry; and Combaning supports regrowth of ironbark - a much sought-after timber. Commercial logging within the Shire is a rare event although the three local forests do contribute to the broader forestry enterprise of Forests NSW. All three State Forests in the Shire are managed by State Forests NSW in accordance with forest plans of management. These forests include many areas of high conservation value, within what is generally a cleared agricultural landscape. Such areas are likely to support endangered ecological communities and /or habitat that supports threatened species.

Over time, there may be some limited potential for forestry to become part of the Shire’s economic future - possibly as part of farming diversification programs. There is also a possible future for eco-tourism in such areas.

3.6 Tourism

As noted elsewhere, tourism has yet to make a significant contribution to the Shire’s economy. The community consultation program which preceded this present study revealed a strongly-held view that there is potential in this sector but it has yet to be realised.

One of many recommendations for Temora (and other Shires) in the Riverina Regional Tourism Plan (p.48) is that Temora be included in a tourist driving circuit taking in Gundagai, Wagga Wagga, Coolamon, Cootamundra and Junee. There is also a suggestion for a “hub and spoke” package with Wagga Wagga and Griffith being hubs for circuits involving Temora, Junee, Cootamundra and Coolamon. The Shire’s position in relation to the Newell and Olympic Highways is a significant factor in this regard. Overall, however, commercial tourism is still not a major part of the local economy although ‘visitation’ is strongly evident. The regular monthly fly-ins at the airport, and visitation to the Aviation Museum, are examples of growth in this regard.

On the east-west route of the Burley Griffin Way, councils are cooperating on the concept of a tourism trail which has the potential to increase local visitation. In Arianah Park and Springdale, plans are in hand to create regular markets for local produce and other items.

In this context it can be seen that a new local plan should offer some encouragement to local farmers and others to add value to their enterprises by ‘farm gate’ selling of produce and local specialities to tourists. The plan should provide opportunities for producers to store, display and promote their produce at the farm gate - subject to appropriate controls over traffic movement, parking, the design of structures, outdoor advertising, night lighting and the like.

Related to this prospect is the wider scope for developing opportunities for visitors to experience various agricultural pursuits in the field. Possibilities include exposure to harvest time activities, visits to working cattle and sheep properties, and specialist tours of piggeries and cattle feed lots. Country-style 'home-stay', bed-and-breakfast establishments, and country pubs will offer simple accommodation backup.

With regard to the specific infrastructure needs of the tourism sector, the Regional Tourism Plan provides useful guidance. Within the Shire, cultural tourism is supported by the Heritage Committee of Council, whilst Ariaiah Park is served by a similar local progress committee. A future cultural tourism program will utilise information of a historic and cultural nature from these and other sources. Temora's main street lacks environmental quality, with minimal landscaping: recent and future improvements (including the removal of heavy through traffic) will help to enhance its potential to attract visitors. Suggestions arising from the Discussion Paper are also relevant (See Appendix B).

For land-use planning purposes, perhaps the most significant tourism infrastructure gap is the shortage of quality accommodation and meeting facilities for conference and convention groups (for example) and for major events and 'fly-ins' at the airport. Some private sector interest in addressing this deficiency is evident at the time of writing.

3.7 Industry and employment

The Council's Tewkesbury Road industrial subdivision west of Waratah Street and north of MR 84 in Temora is fully taken up and a shortage of industrial land is imminent. In response, the Council resolved in 2003 to move towards incorporating changes to the current LEP to facilitate the release of 10ha of Council-owned industrial land to the east of Waratah Road.

Other suitable locations for industrial development - including areas suited to small-scale home enterprises - are between the Barmedman Road and Airport Road, and in the area immediately to the east of Greyhound Park and Nixon Park. At Ariaiah Park, the Council-owned land to the north of the railway also offers some potential.

On the western side of town, bounded by the Griffith Road and railway reservation, Quartz street, Polaris and Twynam, is a roughly triangular area which has obvious potential for industrial and transport enterprises requiring immediate proximity to trunk road and rail. The area is currently zoned Rural 1(a) but because of its limited size, shape, location and other environmental characteristics it no longer has any attractions as prime agricultural land. Currently, sites on the east of this block are occupied by one of the region's largest grain and fertiliser storage and handling companies. From a practical planning and development point of view it is considered that rezoning of the entire triangle to accommodate infrastructure-related industry would be an appropriate move. To a somewhat lesser extent the same rationale can be applied to another triangular area on the south-east, bounded by the Cootamundra road, the railway, and Wheat Street. This area is currently dominated by the Graincorp storage and handling facility.

Outside the industrial sector itself, but looming as a potentially significant employment area in its own right, is the burgeoning field of information technology. Already there are members of the Temora community working at home in this field, and it seems certain to grow. Proximity to Canberra and Wagga Wagga's support services, airports, and universities - together with Temora's local assets such as the Agricultural Research and Advisory Station, aviation museum and operational facilities, and TAFE - could possibly stimulate some in-migration by people seeking opportunities in the IT field, along with the prospect of cheaper land and housing in Temora.

The Agricultural Research Station is located on a 649ha site 6km to the north of the town on the road to West Wyalong. It employs a permanent staff of 15 who are engaged in plant breeding, the production of pure seed, and providing advice and support for local farmers. Recent (2004) research by the Council indicates that the ARS is a highly valued player in the local economy, with some 50 + people being directly or indirectly dependant on its existence. Salaries and wages total in the order of \$1.15m: a multiplier of 3 suggests that the Station contributes some \$3.5 to the Shire's economic base.

3.8 Aviation in Temora (Figure 5)

Temora Airfield is the location of the renowned Temora aviation museum and airport facility, together with the successful Council - sponsored subdivision for house/hangar aviation interests. The airfield is operated by the Shire Council, and sits at an elevation of 921 feet. The main runway is 1486m long; the second is 815m. The recent airport improvements and subdivision point towards further growth in this highly specialised sector, with the promise of additional jobs and spin-off bringing benefits to the Shire's economy as a whole. According to museum management, the existing real estate holding is adequate. A new 2000m sealed runway (northeast/southwest) with lighting and landing system has recently (2/05) been completed and is capable of carrying heavy jet aircraft.

The Shire Council has been working with the Department of State and Regional Development on the preparation of a strategic development plan for the airport. A primary goal of the new plan is to increase the capacity and attraction of Temora as a centre for sporting and recreational aviation, coupled with growth in the provision of accommodation for general aviation and aviation service businesses. With its new main runway, Temora Airport may also have a future role as an alternative to Wagga Wagga - especially in emergency situations.

3.9 Extractive industry

Temora lies along a highly prospective corridor of volcanics and related rocks generally referred to as the Gilmore Suture. Extensive exploration is currently being undertaken along the suture. Within the Shire itself there is small-scale extractive industry to supply local demand for gravel and road base. Some exploratory drilling is continuing along local fault lines. The Cowal Gold Project (Barrick Gold of Australia) in Bland Shire, north of West Wyalong, is at an advanced stage of development, with gold production already underway. According to company figures, the permanent workforce will be around 200, and this may generate some economic benefits for the Shire (eg demand for housing, retail and support services). Temora's airport (whilst not in this industry sector) has already demonstrated potential in this latter regard.

3.10 Housing

3.10.1 Generally

At present there is spare serviced land capacity in Temora and Aria Park. In Temora town itself there are in excess of 100 properties which are vacant, underutilised, obsolete or dilapidated beyond repair or awaiting demolition. In purely numerical terms there is probably sufficient stock to satisfy the housing demand for some years to come.

The existence of vacant serviced blocks, landlocked back-lands and empty houses in the existing Temora town represents a valuable but under-utilised resource whose future presents a significant planning challenge. Examples are evident off Kitchener Road, Polaris Street, and Victoria Street. At the same time, the search for "quality" blocks in "desirable" areas will continue unabated, bringing pressure on the Council to release more peripheral land. These realities point to the need for the new plan to incorporate incentives for more intensive development (especially suited to smaller households) in older parts of town whilst catering for the demand for 'green-field' housing in newer areas.

In Temora town especially there is continuing pressure from developers and builders to release green field sites. That option must be provided for in the new plan, alongside the alternative of being proactive in promoting the redevelopment of existing vacant and obsolete residential properties which are already fully serviced and where no additional infrastructure is needed.

Given that this alternative is largely associated with the older inner areas of town, secondary benefits will accrue in that replacement dwellings will be closer to the town centre shops and services, schools, parklands and other facilities. From a planning point of view this suggests that whilst there is a need to allocate more 'green-field' land for housing purposes, there is also the need to ensure that the local plan encourages and promotes the redevelopment option - perhaps by way of a special zone and incentives in the instrument itself (for example, by encouraging battle-axe subdivisions in certain

locations). The creation of opportunities for multi-unit developments, including aged persons housing, would be one benefit of such a policy.

Table 3.3.1 provides figures on development activity in the Shire during the period 1999 to 2004. The Table provides gross figures and does not differentiate between development on older 'infill' sites and green-field sites. Whilst such differentiation may be of general interest, it is unlikely to be of value in a strategic planning context because the housing market in Temora is extremely fickle, with no hard data being available to help in identifying significant trends in either the infill or green-field sectors. For many years the Council has been well aware of the spare capacity in the infill sector but has been unable to achieve a degree of enthusiasm in this sector such that spontaneous consolidation has occurred. Despite this record the strategic intent remains clear, this being to encourage infill development by way of appropriate provisions in the new LEP and by other complementary means. Within current data limitations there is no way of predicting how successful this strategy will be, or over what period of time it ideally should run.

3.10.2 Public Housing

The NSW Department of Housing has a number of assets in Temora, and the Department has advised the Council (13/07/07) that over time it may need to redevelop some of its properties 'in order to better meet housing needs, diversity ownership, housing type and social mix'. The Department has also indicated that it will be essential for the new LEP to retain or enhance the development potential of its assets in the town.

The Department has provided data on the Temora housing market, summarised as follows (based on 2001 Census):

- 2,299 occupied dwellings (2001)
- average occupancy 2.60 persons/dwelling
- private rental - 14.5% of all occupied dwellings
- private rental market is not catering adequately for the smaller low income households
- private rental stock - 27% had 2 bedrooms, 64% with 3+ bedrooms
- Dept of Housing projections to 2011 point to a potential demand 82% for one or 2 bedroom dwellings
- Growing need for more 1 or 2 bedroom dwellings
- Purchase affordability in Temora has declined from 71% (12/01) to 28% (12/05)
- Median house sales price in Temora (12/06) was \$157,000 - an increase of 127% from the 12/01 figure of \$69,000
- At 12/2005 there were 74 social housing units in Temora (seventy dwellings & four community housing) - 2.8% of the total housing stock.

For the Department, the following are the key issues for community housing in Temora:

- There is a need for more diversity of housing stock, particularly including one bedroom units, studio dwellings and 'boarding house' type of accommodation to meet the particular needs of single person households (especially renters on low incomes). The relative lack of housing diversity forces single person households to pay rent on dwellings which are larger than they need.
- Consideration should be given as to ways and means of encouraging the provision of more rental housing in Temora.

3.11 Education

In addition to primary and secondary schools, Temora hosts a vigorous TAFE campus and a branch of the Riverina Institute. In addition to TAFE, the Council has established affiliations with the Western Institute, the campuses of Charles Sturt University at Wagga Wagga, Albury and Bathurst, and the University of Technology Sydney. An important local asset is the Community Technology Centre.

The TAFE campus is located on a generous site adjoining the hospital and high school in the heart of the town, with frontages to Kitchener and Gloucester Street. Total enrolments in the period 1998 to 2004 stand at 3739 students, with a total graduation list of 2041. At the end of 2003 the total TAFE staff numbered 35, generating a budget line of some \$818,000 for the year and making it a major employer in the town. Almost \$30,000 was spent locally on supplies and services. Significant TAFE activities include the following:

- * Temora TAFE has a joint venture with the Shire Public Library.
- * Temora High School students have access to TAFE vocational education and training on the TAFE campus in areas such as Business Services, Automotive and hairdressing. There is also a teaching arrangement between TAFE, Temora High and St Anne's Central School.
- * TAFE is represented on the Council's *Knowledge Temora* support group which is facilitating the expansion of educational facilities in the Shire.
- * Council staff have access to local government training courses on the TAFE campuses at Albury and Temora.
- * Access to local government, civil construction, and a wide selection of short courses which can be delivered by Institute staff in Temora.

At the senior level Temora High School has an enviable academic record, with a considerable proportion of final-year students going on to tertiary levels of study. Senior students from St Anne's Central School study under a shared teaching arrangement with THS. Further growth of Temora's educational resources will depend on factors which generally lie outside the scope of a local environmental plan. At the same time, it is recognised that as the town's population grows so too will the need for additional primary school facilities - especially in the proposed growth corridor to the north. At an appropriate time a site should be identified and incorporated in master plans for that sector.

If population growth and employment can be sustained, the prospects for further development of the TAFE campus and its post-secondary curricula would appear to be good. TAFE has the capacity to meet a wide range of training needs and is keen to work more closely with the Council to ensure that there is an adequate information flow to the wider community about its resources.

In the fields of cultural and general tourism, and perhaps aviation (for example), TAFE will play an important training role in the future by designing and administering courses for people working in the hospitality sector, in the conservation of heritage buildings, and in aircraft maintenance. TAFE is also looking to the possibility of developing stronger ties with Charles Sturt University in Wagga Wagga, offering combined courses leading to full degree awards.

3.12 Health

The Temora Community Health Centre provides free community-based services with an emphasis on health promotion, prevention, and early intervention. Temora District Hospital is a major facility, part of the former Greater Murray Health Service (now Greater Southern Area HS). The hospital campus also accommodates the Community Health Service. In 2001-2 the hospital recorded 6300 occupied bed days, based on a 30-bed facility. There were 1783 admissions and 120 operations. Visiting services are provided to outlying areas depending on need.

The hospital employs about 35 permanent staff, most of who live locally. Supplies and services are purchased locally whenever possible: salaries and local purchasing constitute a significant contribution to the local economy. Further growth of the Temora hospital appears to be unlikely. Growth in demand (e.g. for aged care services) will be handled through achieving operational efficiencies rather than corporate expansion. Through its Community Health officers, the hospital is an active partner in programs for alcoholism and drug abuse - working with community focus groups in the region. From its office in NRCC House, Community Health works with HACC and Homecare to serve the wider Shire community.

Accommodation for the elderly is provided at the Noel Warren Masonic Village, Greenstone Cottage (adjacent to the hospital), Doctor Parry House and the Southern Cross Units. The latter two are self-contained retirements facilities. Given the demographic profile of the Shire there would appear to be a

clear potential - if not a growing demand - for more accommodation for the retired and elderly. This in turn would add to the employment pool and help to further strengthen the local economy.

Health services are provided by three qualified obstetricians; two dental surgeries; two physiotherapists; two dieticians; one pharmacist; 5 full-time medical practitioners supported by visiting specialists and a female doctor serving female patients; a visiting psychiatrist; and one optometrist.

3.13 Commerce; local business

Temora has 5 banks (Westpac, ANZ, St George, Commonwealth and National Australia). Two credit unions have branches, and several private brokers offer investment advice. Two legal firms are active, employing 5 solicitors and support staff. Other finance and property services include 2 investment advisors, four accounting firms (total professional staff of 12); two insurance brokers; several stock and station agents; and four real estate agencies. Shire-wide in 2001, the retail sector employed 292 persons out of a total workforce of 2048; the property and business services sector employed 132 persons; and manufacturing industry and construction employed 160.

Department of Commerce records based on business names (registered and cancelled) show that in the 10 year period 1995-2005 the number of registered business in Temora rose from 276 to 329.

3.14 The arts; culture as an economic resource

As discussed elsewhere in this report, Temora exhibits a significant imbalance in the allocation of Council resources to sport and recreation on the one hand, and to cultural enterprises on the other. [40:1 ratio - 2004]. This suggests that the value of the latter as an economic resource is poorly understood. Evidence suggests that for some potential new settlers and investors (and particularly those in the tertiary-educated 25-50 year cohort) there will be a preference for locations which offer a more even balance - and currently Temora is not doing that.

If the Shire is to succeed in attracting appropriately qualified professionals and managers into new and established enterprises, a more balanced social and cultural climate may well be needed. Another related aspect is that the tourism and conference industries are increasingly focussing on 'cultural tourism' as an economic resource in its own right. The time may well be appropriate for Temora to address these inter-related issues by preparing a strategic plan for cultural development, covering both organisational and infrastructure needs. Such a plan would pave the way for management initiatives as well as 'bricks-and-mortar' projects such as a central plaza (in parallel with the planned Hoskins Street up-grade) in the town hall-civic centre precinct.

3.15 Overview - local economy

Despite demographic trends which can be interpreted as evidence of possible economic decline, evidence on the ground and on Council's files point to a healthy if not buoyant local economy. Figures presented above reveal a robust level of building activity whilst in business and commerce, health services, education, legal and financial services, transport, accommodation and tourism there are signs of continuing confidence. Investment in property development has averaged in excess of \$.5m annually during the past 6 years. Between 1995 and 2005 there was a 20% increase in the number of registered businesses operating in the Shire. In the mining sector the shire is considered to be highly prospective for copper and gold, with active mineral exploration campaigns by several companies being currently under way.

In summary:

- * high school and TAFE enrolments are increasing - up 15% from 2000-05;
- * all 3 hostel/retirement villages are planning to expand;
- * grain handling and the agricultural service sector generally are growing;
- * specialised IT and computer services are now available in town;
- * the total number of cafes, restaurants and catering services has increased;
- * local builders and specialist subcontractors have improved capacity;
- * one new motel has opened, and a new one is planned;

- * the airport and aviation museum (flagship attractions in the Riverina) are attracting more visitors (40,000 annually)
 - * livestock production (sheep, cattle, pigs) is buoyant - with capacity of the piggery currently expanding , and average annual tonnages of seed and serial crops holding at significant levels;
 - * Temora town has retained its banking services, now augmented by 2 non-bank financial institutions, additional legal and accountancy services;
 - * indicators of growth in personal disposable income such as hairdressers, jewellers, beauticians and landscape nurseries are numerous.
-