

The Allen Consulting Group

Valuing the Priceless: The Value of Historic Heritage in Australia

Research Report 2

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Preface

This research report has been commissioned by the Heritage Chairs and Officials of Australia and New Zealand to inform debate about the value of heritage conservation in Australia.

The views in this report reflect those of The Allen Consulting Group, and not necessarily those of the Heritage Chairs and Officials of Australia and New Zealand or their respective governments.

The report is complemented by another research report that addresses the circumstances when it is appropriate for government to intervene to protect historic heritage places; and the manner in which historic heritage places are protected by governments.¹

¹ The Allen Consulting Group 2005, *Thoughts on the 'When' and 'How' of Government Heritage Protection*, Research Report 1, Heritage Chairs and Officials of Australia and New Zealand, Sydney.

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Executive summary

The conservation of historic heritage places is ...

Heritage is what we inherit, but more specifically what we retain of this inheritance. The heritage value of a place is also known as its cultural significance which means its aesthetic, historic, scientific, social or spiritual value for past, present or future generations.

... something whose value needs to be understood ...

Understanding what is meant by value in a heritage sense is fundamental since ‘Value has always been the reason underlying heritage conservation. It is self-evident that no society makes an effort to conserve what it does not value.’²

... but there are a range of ways of determining value including ...

There is no single approach to assessing value when discussing heritage places (and cultural issues more generally), but three approaches are referred to most often:

... measuring people’s aggregate willingness to pay for various heritage attributes ...

- value derived from individual perceptions — heritage values can be measured in terms of an individual’s willingness to pay or accept compensation.³ For historic heritage places to have economic value, a person must be willing to pay an amount of money to protect the place or willing to accept an amount of money as compensation for its loss. The economic concept of value has been broadly defined as any net change in the welfare of society. A heritage place may provide value in a number of ways:
 - direct use value — the physical assets that embody historic heritage (e.g. the houses, public buildings, etc) have a ‘use value’ like any other physical asset. The heritage component may increase this use value, as people derive additional value from seeing it, visiting it, or living or working in it;
 - indirect use value — heritage places generate broader social benefits such as a sense of identity, facilitate social interaction, create a positive aesthetic, etc; and
 - non-use values — heritage places are valued for a variety of intangible benefits that do not require a person to ever actually visit the place. Indeed, a heritage place may generate: option values, whereby a person values the option to visit a heritage place, although they may not have immediate plans to visit it; existence values, whereby the simple existence of the place means that people would feel a quantifiable loss if it were destroyed; other non-use values, such as the value generated by the chance to bequeath a heritage place to future generations, as part of a shared cultural legacy (i.e. intergenerational value).
- value derived from social interaction — a second approach to the valuation of heritage places is that derived from social interaction. That is, this approach seeks to identify the extent to which heritage places enhance social capital and community welfare more generally.⁴ The Productivity Commission has suggested that:

... assessing how heritage enhances social capital ...

² M. de la Torre and R. Mason 2002, ‘Introduction’ in *Assessing the Values of Cultural Heritage*, Research Report, The Getty Conservation Institute, Los Angeles, p. 3.

³ B. Frey, ‘The evaluation of cultural heritage: Some critical issues’, in M. Hunter and I Rizzo (eds), *Economic Perspectives on Cultural Heritage*, St. Martin’s Press, New York, pp. 31-49.

⁴ See I. Winter (ed) 2000, *Social Capital and Public Policy in Australia*, Australian Institute of Family Studies, Melbourne.

The social capital of a society includes the institutions, the relationships, the attitudes and values that govern interaction among people and contribute to economic and social development ... it is the glue that holds [institutions] together. It includes the shared values and rules for social conduct ... and a common sense of 'civic' responsibility that makes society more than just a collection of individuals.⁵

While the Australian Bureau of Statistics' (ABS's) Social Capital Framework includes specific reference to cultural heritage (i.e. history) as a basic social condition that underpins social capital,⁶ the challenge is to draw firm links between changes in the conservation of heritage places and community welfare more generally; and

... looks at the intrinsic value of heritage

- the intrinsic value of heritage — a third approach to the valuation of heritage places suggests that the value of heritage is absolute or intrinsic, such that their worth existed independently of any evaluation by the public, and potentially irrespective of any interaction of the public in a social capital sense. For the purposes of the economic analysis undertaken in this particular study intrinsic value is not relevant because the focus is on value 'formed only by the instinctive and/or deliberate thoughts and actions of human beings'.⁷

Previous Australian studies measuring the value of heritage places

Previous studies of the value of heritage places and their conservation have addressed ...

There have been a range of Australian studies that have sought to quantify the value of heritage places. Quantification studies (i.e. those studies looking beyond social impacts) have generally focused on one or more of the following classes of heritage places:

... residential buildings ...

- residential buildings — numerous studies have sought to identify the degree to which heritage values contribute to the price of residential properties, and whether or not listing of such properties (i.e. seeking to ensure the maintenance of the heritage characteristics) affects property values;⁸

... and commercial buildings ...

- commercial buildings — most studies have sought to address whether the use values of heritage exceed any additional heritage-related costs, and the role that incentives may play in facilitating the conservation of the heritage buildings;⁹ and

... and tourist activity related to heritage places ...

- tourist places — both domestic and international tourists are major visitors to historic heritage places. For example, in 2004 domestic and international tourists who visited a heritage place spent an estimated \$7.8 billion on trips in which they visited at least one historic heritage place.

... and have demonstrated some important insights ...

On the whole, and rebutting the common perception provided by the media, the residential and commercial studies have demonstrated that property values have not been negatively affected by heritage listing (i.e. the impact has been neutral or

⁵ Productivity Commission 2003, *Social Capital: Reviewing the Concept and Policy Implications*, Research Paper, AusInfo, Canberra, p. ix.

⁶ Australian Bureau of Statistics 2004, *Information Paper: Measuring Social Capital — An Australian Framework and Indicators*, Cat. No. 1378.0, Canberra.

⁷ D. Throsby 2003, 'Determining the value of cultural goods: How much (or how little) does contingent valuation tell us?', *Journal of Cultural Economics*, vol. 27, pp. 275–285, p. 278.

⁸ Urban Consulting Group 1994, *Economic Effects of Heritage Listing*, North Melbourne, p. 1.

⁹ D. Thomas 1994, 'Fitout of a modern building vs conservation of a heritage building: comparative cost evaluation', presented at ICOMOS conference, Hobart, May; and C. Dominy 2001, *The Economics of Heritage Listings: Part B, The Impacts of Heritage Requirements on the Financial Viability of Individual Development Proposals*, Sydney.

positive). This reflects the view that it is the collective heritage ambience, created by a systematic listing strategy, that is the attraction rather than the benefits created by the protection of a specific residential or commercial place.

... but have been limited in a number of ways

Overall, however, the analysis of the value of heritage places has been relatively unsophisticated, has tended to focus on economic activity as a proxy for value, and has lacked broad applicability.

Community attitudes to historic heritage

A national survey was undertaken to gauge community attitudes to heritage places and their conservation

In order to gain a better understanding of the value provided by historic heritage places, and to address some of the criticisms of past studies noted above, an online survey of 2024 adult Australians was undertaken. The survey sought to:

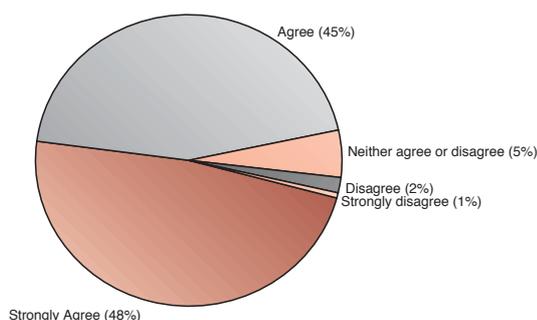
- identify people’s views on a number of matters, which would in turn point to some elements of social capital affected by historic heritage place protection; and
- quantify the values that people attach to a number of attributes of protection afforded to historic heritage places (this was done using a technique called ‘choice modelling’).¹⁰

General attitudes to heritage places and their conservation

The importance of heritage is understood by the community ...

Consistent with the view that the culture of a society is one of the underlying conditions upon which social capital sits,¹¹ it is understandable that the survey revealed that 93 per cent of the community see heritage as forming part of Australia’s identity (see following figure).

COMMUNITY (ADULT) RESPONSE TO ‘HERITAGE IS A PART OF AUSTRALIA’S IDENTITY’



... and both use and non-use benefits are understood to arise from heritage places ...

The survey also asked people to agree or disagree with a series of statements which identified people’s views on heritage-related values. The following table shows that the majority of respondents value the use and non-use aspects of historic heritage.

¹⁰ For further information about the choice modelling technique see: M. Morrison, R. Blamey, J. Bennett and J. Louviere 1996, *A Comparison of Stated Preference Techniques for Estimating Environmental Values*, Choice Modelling Research Report No. 1, University College, University of New South Wales, Canberra; and J. Bennett 1999, *Some Fundamentals of Environmental Choice Modelling*, Choice Modelling Research Report No. 11, University College, University of New South Wales, Canberra.

¹¹ Australian Bureau of Statistics 2004, op. cit., p. 14.

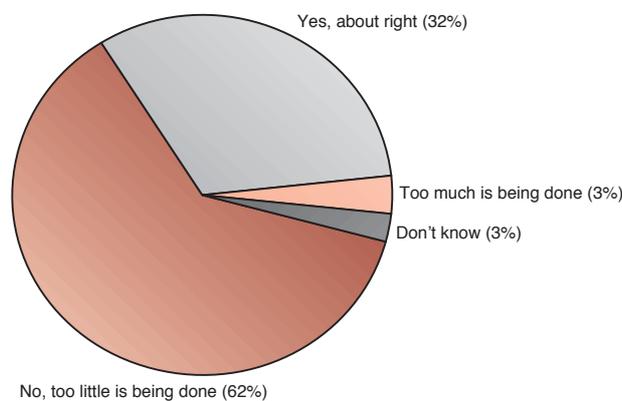
COMMUNITY VIEWS AND PERCEPTIONS OF HERITAGE-RELATED VALUES

Value type	Statement	'Strongly agree' and 'Agree'	'Strongly disagree' and 'Disagree'	Neither agree or disagree
Direct use value	Looking after heritage is important in creating jobs and boosting the economy	56.1%	11.0%	32.9%
Indirect use value	My life is richer for having the opportunity to visit or see heritage	78.7%	4.6%	16.8%
Option value	It is important to protect heritage places even though I may never visit them	93.4%	1.5%	5.0%
Existence value	Heritage is part of Australia's identity	92.3%	5.3%	2.3%
	The historic houses in my area are an important part of the area's character and identity	80.2%	5.2%	14.5%
Other non-use values	It is important to educate children about heritage	96.9%	0.3%	2.8%

... and there is a sense is that more needs to be done to protect these benefits

As the following figure indicates, the survey indicates that the majority of the community believes that inadequate support is provided to heritage conservation. In essence, the majority of the community believes that there are benefits from additional government commitment to heritage conservation.

DO YOU THINK THAT ENOUGH IS BEING DONE TO PROTECT HISTORIC HERITAGE ACROSS AUSTRALIA?



Choice modelling

Choice modelling ...

Choice modelling involves eliciting people's stated preference for different options in a hypothetical setting. The experiment endeavours to replicate a market setting, where people are confronted with the choice of various products that are characterised by specific attributes and an acquisition price. Being a stated preference technique, CM is capable of eliciting respondent preferences for new products (or outcomes) that do not currently exist in the market place.

... was used to test the degree to which people are willing to pay to protect various attributes associated with heritage places

Choice modelling was undertaken to look behind general statements about heritage to see the degree to which the population is willing to financially support the call for a greater commitment to heritage protection, and which historic heritage conservation outcomes they particularly value.

It revealed that ...

The general conclusions from the choice modelling are:

... people understand that heritage conservation is not costless and that they are willing to pay for ...

- Respondents were conscious of the financial impost a heritage levy would mean for them should they choose a different level of heritage protection than currently provided.

... better access to heritage places, conservation of more heritage places, and conservation at a higher standard of care ...

- Respondent utility¹² is increased by:
 - an increase in the number of heritage places protected — average willingness to pay for the *protection of additional places from loss* is estimated to be \$5.53 per person each year for every 1000 places protected;
 - an increase in the proportion of places that are in good condition — a 1 per cent increase in the proportion of places in *good condition* is valued at \$1.35 per person per year; and
 - an increase in the proportion of places that are accessible to the public — a 1 per cent increase in the proportion of *places that are accessible* to the public is valued at \$3.60 per person per year.

... and a mix of young and old heritage places (i.e. not just places over 100 years of age) ...

- Respondents prefer heritage protection outcomes in which there is a greater mix of young and old places, relative to outcomes where most places are over 100 years old — the results indicate that an increase in the proportion of heritage places exceeding 100 years old would *reduce* respondent welfare by \$0.20 per year for every 1 per cent increase in the proportion of places aged 100 years or more.

... and a system of heritage protection that does not allow for demolition of heritage places, but allows property owners the flexibility to undertake minor modifications

- On average, respondents are willing to pay \$39.50 per person per year to change the forecast level of *development control* in 2020 from one of 'demolition permitted' to a slightly more stringent protection policy of 'substantial modifications permitted — but no demolition'. However, going the next step to 'no modifications permitted' reduces utility. These results suggest that people perceive development controls to be an important policy instrument for protecting heritage and are not in favour of demolition but do value a system that allows property developers/owners the flexibility to undertake minor modifications.

¹² 'Utility is the level of satisfaction that a person gets from consuming a good or undertaking an activity. Utility has an important psychological component because people obtain utility by getting things that give them pleasure and by avoiding things that give them pain.' — R. Pindyck and D. Rubinfeld 1995, *Microeconomics*, 3rd ed., Prentice Hall, New Jersey, p. 85.

These findings suggest that the community is willing to pay for a package of improved heritage place conservation outcomes

The implicit prices associated with the attributes allow a wide range of different outcome scenarios to be evaluated in terms of respondent willingness to pay for changes relative to a ‘no change’ scenario. The following table provides an illustrative example of how the implicit prices can be used in this way. It shows that, on average, people are willing to pay a significant sum for improved heritage protection outcomes in Australia; a scenario involving a measured tightening of development controls and an increase in the number of heritage listing yields a willingness-to-pay of \$105.90 per person per year. When aggregated to the national population aged 18 years or older, this value equates to \$1.6 billion per annum.¹³

EXAMPLE SCENARIO VALUATION

Attribute	Change by 2020 relative to forecast outcomes	Implicit price (per person, per year)	Units of attribute change	Annual aggregate value (per person)
Additional places protected from loss	8000 places	\$5.53	per 1000	\$44.27
Proportion of sites in good condition	20% point increase	\$1.35	per 1% increase	\$27.04
Age Mix (proportion of sites over 100 years old)	15% point reduction	\$0.20	per 1% reduction	\$3.04
Proportion of places accessible to the public	5% point increase	\$3.60	per 1% increase	\$17.98
Development Control	Only minor modifications permitted	\$13.57		\$13.57
TOTAL				\$105.90

Note: Changes are expressed relative to outcomes that are forecast to eventuate by 2020 under existing management and funding levels.

¹³ This value is a gross benefit. The costs of achieving the changes detailed in table 4.5 would need to be netted off this figure to determine the net value of the policy. Given that costs would accrue through time, this analysis should be performed within a benefit-cost framework, with an appropriate discount rate applied.

Chapter 1

What is heritage?

This chapter briefly outlines what is meant by the term 'heritage'.

Heritage is what we inherit, but more specifically what we retain of this inheritance. Heritage items and places are synonymous terms. They can include sites, areas and cultural landscapes¹⁴ as well as buildings and works (singly or grouped), relics and movable objects and may include components, contents, spaces and views.

The heritage value of a place is also known as its cultural significance which means its aesthetic, historic, scientific, social or spiritual value for past, present or future generations. Cultural significance is embodied in the place itself, its fabric, setting, use, associations, meanings and records. Places may have a range of values for different individuals or groups.

The discussion in this report relates specifically to 'historic heritage places', and includes:

- buildings and structures (e.g. houses, factories, churches, bridges, roads, monuments and cemeteries);
- physically-created places demonstrating ways of life, customs, land use or designs that are not longer practised (e.g. stock routes or gardens);
- physically-created landscapes with evidences related to particular activities (e.g. mining sites, sawpits or fishing areas);
- other places of historic significance (e.g. Captain Cook's landing place as Botany Bay or the Leichhardt tree in Taroom).

This definition excludes natural, indigenous, movable and intangible cultural heritage. This report focuses on government protection of historic heritage protection.

Heritage significance in Australia is assessed under a three-tier legislative system that determines the local, state, national or commonwealth significance of an item. Heritage items can also be included on non-statutory listings (such as the National Trust classifications).

Within these specifications, what is considered to be a heritage building or place is a relatively subjective decision. It is for this reason that criteria have been developed to address major concerns about subjectivity. Importantly, heritage is a broader concept than simply the age of the building or place. In terms of number of places, the vast majority of heritage places in Australia are listed at the local government level, and are buildings with primarily residential and commercial uses, or are community buildings (such as libraries or schools) or religious buildings.

¹⁴ A cultural landscape is one modified by human intervention, or at least affected by human activity. This can range from minimal intervention such as open range grazing on pastoral properties to large-scale degradation such as mining landscapes.

Heritage places require conservation. Heritage conservation relates to those activities that are conducted with the specific objectives of retaining heritage significance of a particular building or place. Conservation may involve maintenance, repair, preservation, restoration, reconstruction or adaptation.

Chapter 2

What is meant by ‘value’ in a heritage context?

This chapter outlines general frameworks for valuing historic heritage.

Understanding what is meant by value in a heritage sense is fundamental since ‘Value has always been the reason underlying heritage conservation. It is self-evident that no society makes an effort to conserve what it does not value.’¹⁵

Unfortunately, there is no single approach to value when discussing heritage places (and cultural issues more generally).

That said, there is an increasing acceptance that the traditional distinctions established between different claimed forms of value (e.g. economic value, heritage value, social value, environmental value, cultural value, etc) can be measured in both financial and broader social terms, and it is not useful to take each form of value in isolation.

The following sections discuss the three principal approaches to framing the concept of value in the context of heritage place protection.

2.1 Value derived from individual perceptions

Valuing historic heritage shares many characteristics with the problems encountered in valuing the environment — its value can not be easily identified as many of the places may not enter markets, or do so indirectly and imperfectly. And many benefits are wholly intangible. Moreover, the nature of the benefits provided by historic heritage is conceptually very similar to those provided by, for example, national parks.

In economic terms, heritage values are measured in terms of an individual’s willingness to pay or accept compensation.¹⁶ For historic heritage places to have economic value, a person must be willing to pay an amount of money to protect the place (and the values described in figure 2.1) or willing to accept an amount of money as compensation for its loss (and the loss of the values described in figure 2.1).

The economic concept of value has been broadly defined as any net change in the welfare of society. The emphasis that economics places on maximising social welfare requires an awareness of all the benefits and costs, including those that are not fully or even partially revealed in financial markets. In the case of historic heritage, there are often benefits associated with a heritage place’s existence value (i.e. knowing that culturally important resources are protected) but are not captured in any market valuation. While these unpriced values are difficult to reveal, they have economic meaning nonetheless because any thing or action from which individuals gain satisfaction is deemed to be of value. Valuation, therefore, is used

¹⁵ M. de la Torre and R. Mason 2002, op. cit., p. 3.

¹⁶ B. Frey, op. cit., pp. 31-49.

to mean the process of valuing or estimating the changes in the net welfare of society.

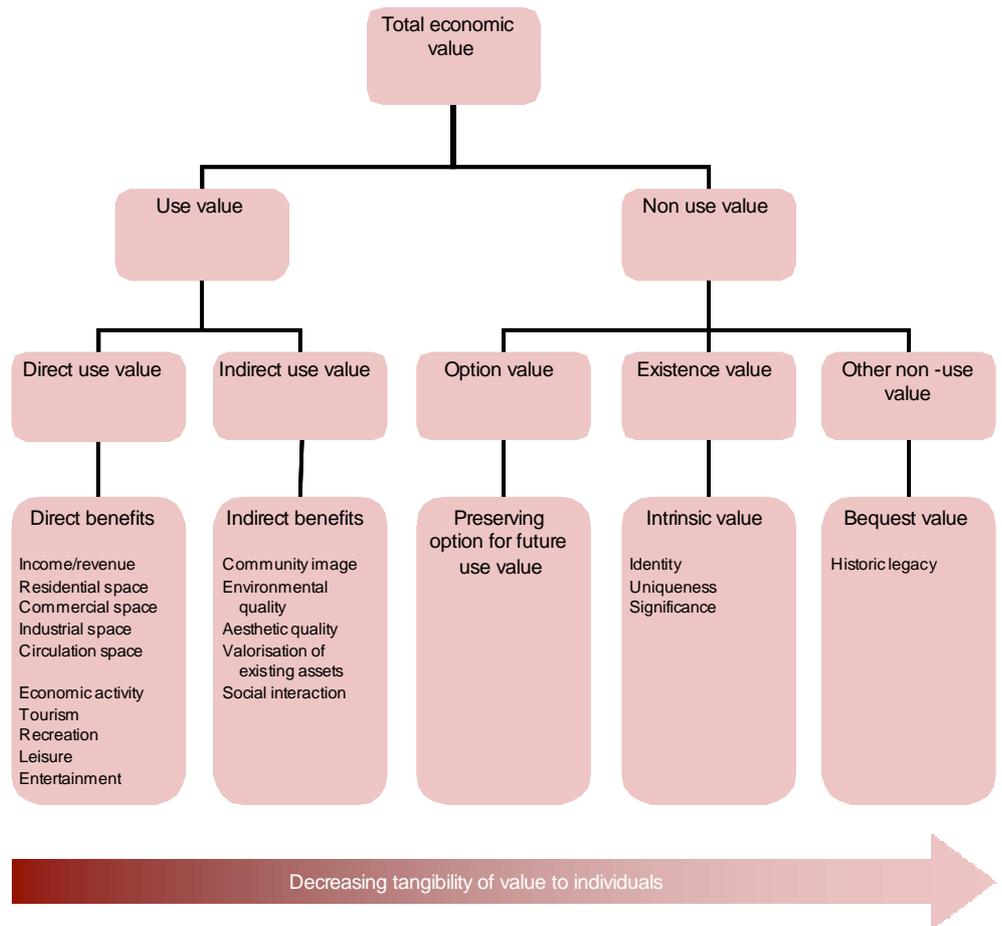
Heritage is not a good or service in isolation, but rather is an attribute of a number of goods which have other attributes and uses. For instance, in Australia many historic buildings are residential properties or serve a commercial purpose, aside from being heritage items. The heritage aspect of these places is therefore, most often, the 'secondary good' being consumed.

Heritage generates total economic value for a variety of potential reasons. A heritage place may provide value to:

- those who make use of the place — the physical assets that embody historic heritage (e.g. the houses, public buildings, etc) have a 'use value' like any other physical asset. The heritage component may increase this use value, as people derive additional value from seeing it, visiting it, or living or working in a heritage place; and
- those who do not use a place, but gain some value from its existence — heritage assets are valued for a variety of intangible benefits that do not require a person to ever actually visit the place. Indeed, people may value (i.e. benefit from):
 - the simple existence of the place in that they would feel a quantifiable loss if it were destroyed;
 - the option to visit a heritage place, although they may not have immediate plans to visit it; and
 - the chance to bequeath a heritage place to future generations, as part of a shared cultural legacy (i.e. intergenerational value).

These various categories of value can be organised as shown in figure 2.1.

Figure 2.1

HISTORIC HERITAGE: CATEGORIES OF VALUE

Note 1: 'Valorisation' can be described as the process of disseminating and exploiting outcomes with a view to optimising their value, enhancing their impact and integrating them into broader practices.
 Note 2: While some may view the bequest value as being quite tangible, it is shown as being relatively more intangible because the value of the historic legacy cannot accurately be determined today (i.e. the value of existing conservation activities will only be accurately determined by future generations).
 Source: I. Serageldin 1999, *Very Special Places: The Architecture and Economics of Intervening in Historic Cities*, The World Bank, Washington.

As figure 2.1 shows, the total economic value can be divided into a number of categories of value. Within the literature, the breakdown and terminology can slightly vary, but generally include:

- direct use value;
- indirect use value; and
- non-use value.

The former two are generally referred to together as 'use' values. Each is often further subdivided into additional categories.

Each of these use and non-use benefits can increase welfare and so each should, to the degree possible, be recognised in any analysis. It should also be recognised that in some cases the benefits may conflict and there may need to be a tradeoff in choosing the degree of place conservation and use (see box 2.1).

Box 2.1

ACKNOWLEDGING POSSIBLE TRADE-OFFS IN HERITAGE VALUES

Acknowledging that historic heritage places have an economic, environmental and socio-cultural value, the issue then becomes one of whether to value each category on their own merits or whether to value them in conjunction. To some extent, the actions to address, say environmental problems, can be valued separately, just as they would if the place did not have heritage significance. In some cases, however, the impact of each of these categories may not necessarily increase together. For example, de la Torre and Mason have noted that:

'One must begin by recognizing that there is a multiplicity of values behind the notion of "heritage." Cultural heritage is an essentially **collective** phenomenon; it is essentially **multivalent** as well. A particular building or site embodies many different types of value: social, political, aesthetic, spiritual, educational, and, of course, economic. The different types of value are well understood on their own, by their corresponding sets of experts. But they are not easily understood in relation to one another - often they are seen as incommensurable, or just plain contradictory. Economic values, for instance, tend to take precedence and crowd out other values. Economists often think in terms of maximizing one value, but this might come at the cost of eliminating other values.'

Indeed, there may be important trade-offs between different types of value. For example, the enjoyment derived by visitors, and hence their willingness to pay for it, will be adversely affected by the quality of the place (e.g. use of a heritage place may generate increased tourism and employment, but at the cost of some degree of physical degradation and congestion). As a result, it is best to value environmental, economic and social benefits simultaneously in a manner that acknowledges these potential tradeoffs. Pagiola notes that:

'The different categories of value do not necessarily increase together. Indeed, there may be important trade-offs between different types of value. For example, the infrastructure required to make recreational use of a site possible may have adverse aesthetic impacts; architectural constraints imposed to maintain the character of an urban cultural heritage site might prevent residents from making desired changes. Careful planning can reduce the extent of any trade-offs, but they usually cannot be entirely eliminated.'

Source: S. Pagiola 1996, *Economic Analysis of Investments in Cultural Heritage: Insights from Environmental Economics*, Environment Department, World Bank, June, p. 4; and M. de la Torre and R. Mason 1999, Economics and heritage conservation: Issues and ideas on valuing heritage, presented at the 1999 United States/International Council on Monuments and Sites Symposium, 'Culture, Environment and Heritage: Forging New Alliances to Create a Sustainable Future for the Past', Washington D.C., <http://www.icomos.org/usicomos/Symposium/SYMP99/delatorre.htm>, Accessed 3 June 2005. Emphasis in original.

The distinction between personal and social benefits is important because it can affect how one looks at the merits of protecting various heritage places. As an example, table 2.1 outlines a hypothetical and stylised overview of the values attached to eight different heritage places.¹⁷ It is assumed that the appropriate magnitudes for the first three benefits and costs are known, from which it is possible to derive:

- the social value by summation of use value and existence value;
- the private surplus by subtracting the costs of conservation from the use value; and
- the social surplus by subtracting the costs from the social value.

¹⁷ The example is drawn from C. Hjorth-Andersen 2004, *The Danish Cultural Heritage: Economics and Politics*, Discussion Paper 04-33, Institute of Economics, University of Copenhagen, Copenhagen, pp. 7-8.

Table 2.1

VALUES AND MAINTENANCE COSTS ASSOCIATED WITH EIGHT POSSIBLE HERITAGE PLACES

Heritage place	1 Use value	2 Existence value	3 Costs	4 = 1+2 Social value	5 = 1-3 Private surplus	6 = 4-3 Social surplus
1	10	40	5	50	5	45
2	12	25	30	37	-18	7
3	14	30	20	44	-6	24
4	16	5	15	21	1	6
5	18	1	12	19	6	7
6	20	5	30	25	-10	-5
7	22	55	80	77	-58	-3
8	24	1	2	25	22	23
TOTAL	136	162	194	298	-58	104

Source: C. Hjorth-Andersen 2004, *The Danish Cultural Heritage: Economics and Politics*, Discussion Paper 04-33, Institute of Economics, University of Copenhagen, Copenhagen, p. 7.

Using the values in table 2.1, it is easily demonstrated that including or excluding certain types of costs and benefits from any consideration of the merits of heritage conservation can lead to very different outcomes. As an example, the hypothetical approach adopted by four different heritage decision-makers can be considered:

- Private ownership — With only private interests at stake, only the heritage places with a positive private surplus will be conserved (i.e. numbers 1, 4, 5, and 8).
- Public ownership and/or public intervention — From a social point of view, heritage places number 2 and 3 would be conserved in addition to those under private ownership; the government is likely to always conserve more heritage than dictated by private interests since government's *prima facie* responsibility is to correct for any and all sources of market failure (with a broader conception of 'existence value' as a positive externality). Of course, this assumes that the government will act a benevolent caretaker of public interest and address any market failures.
- Experts as decision-makers — If governments delegate heritage decision-making powers to non-partisan experts and caretaker organisations which have no responsibility for the fiscal implications of their decisions, the focus will likely be on the existence value of the heritage places (i.e. paying little or no attention to private values and costs). In this case the desire would be to conserve all the heritage places, as all have positive existence value, and would probably wish to conserve the places in the order 7, 1, 3, 2, 4, 5 6, 8.¹⁸

2.2 Value derived from social interaction

In recent years considerable intellectual effort has been expended in the development of the concept of social capital.¹⁹ The Productivity Commission has previously noted that:

The social capital of a society includes the institutions, the relationships, the attitudes and values that govern interaction among people and contribute to economic and social development ... it is the glue that holds [institutions] together. It includes the shared values and rules for social conduct ... and a common sense of 'civic' responsibility that makes society more than just a collection of individuals.²⁰

The dimensions to cultural and social values include (but are not limited to):

- its ability to contribute towards social stability and cohesion in the community;
- aesthetic qualities that are the basis of architectural appreciation, and the result of artistic creativity;
- the spiritual significance ascribed to places that may allow a sense of identity of the community as a whole;

¹⁸ Hjørth-Andersen has postulated that if a budget constraint is imposed upon the expert decision-makers, when considering which places to conserve, it would be easier to come to unanimity if many rather than few places are protected, so maximising the chances that each expert gets his or her preferred place. Thus, if there is a budget constraint of 34 monetary units the cheapest places will be chosen (i.e. heritage places numbered 8, 1, 5 and 4). Thus, heritage place 3 will not be chosen even though it boasts a larger social surplus than 4 and 5 combined. See C. Hjørth-Andersen 2004, *op. cit.*, p. 7.

¹⁹ See I. Winter (ed) 2000, *op. cit.*

²⁰ Productivity Commission 2003, *op. cit.*, p. ix

- the symbolic power of historic heritage places to create and sustain people's identity as members of cultural groups; and
- the historical value by providing connections with the past and revealing origins of the present.²¹

For each of these categories, historic heritage is understood to serve certain, well-defined social purposes, while conservation performs the essential social function of sustaining heritage. Furthermore, the consumption of heritage is often a shared social experience. That is, as more individuals 'consume' or 'use' heritage goods, or as they use them to a greater intensity, the greater is the collective benefit of these goods contributing to the common heritage value in a community. As Sable and Kling suggest, the proliferation of heritage knowledge and experience lead to common heritage value, social identity and cultural continuity.²²

There is a widely held view that social and economic outcomes of individuals, families and communities are better in areas, and for groups, where there are higher levels of social capital.²³

The historic environment has a key role to play in contributing towards the goal of sustainable communities and enhancing social capital by providing:

- a flourishing local economy to provide jobs and wealth;
- a safe and healthy local environment with well-designed public and green space;
- buildings – both individually and collectively – that can meet different needs over time, and that minimise the use of resources;
- a well-integrated mix of decent homes of different types and tenures to support a range of household sizes, ages and incomes;
- a diverse, vibrant and creative local culture, encouraging pride in the community and cohesion within it; and
- a 'sense of place'.

The ABS' Social Capital Framework (see figure 2.2) includes specific reference to cultural heritage (i.e. history) as a basic social condition that underpins social capital:

The ABS Social Capital Framework includes a list of examples of significant features of culture, and a range of political, legal and institutional conditions that are relevant to the Australian context. The list is not exhaustive and there are obviously a number of other conditions that shape societal conditions.

²¹ D. Throsby 2001, 'Economic aspects of cultural heritage', in *Economics and Culture*, Cambridge University Press, Cambridge, pp. 84-85.

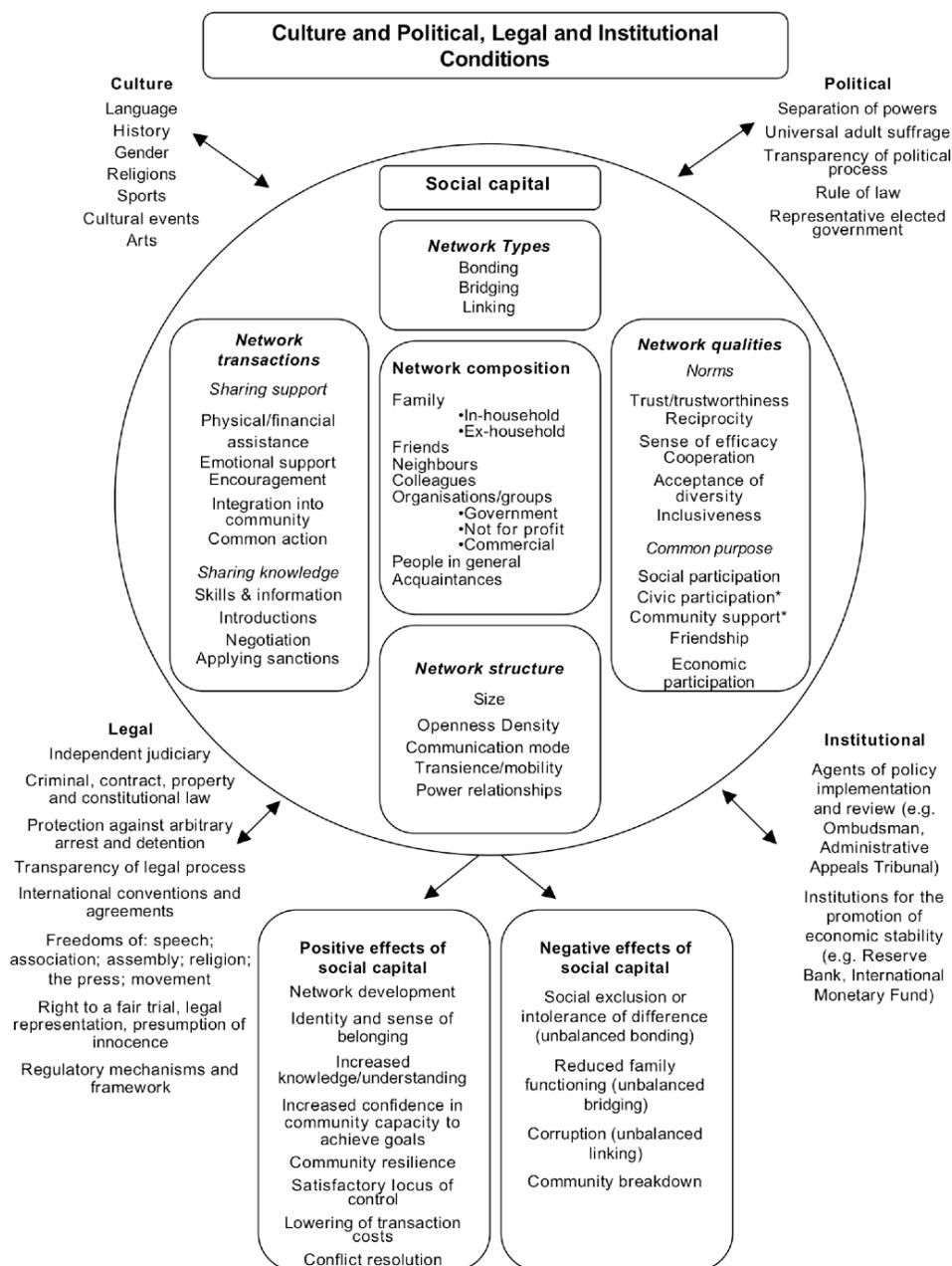
²² K. Sable and R. Kling 2001, 'The double public good: A conceptual framework for "shared experience" values associated with heritage conservation', *Journal of Cultural Economics*, vol. 25, pp. 77-89.

²³ See the discussion in Productivity Commission 2003, op. cit.

Culture refers primarily to features of a cultural environment such as: language; history; accepted behaviours and shared beliefs; religion; sport; art; and cultural events. These features influence social capital in shaping the cultural and social life of a society. This may be in terms of: the types of groups, organisations and institutions that exist; the types of cultural and recreation activities available; the shared understandings gained from a common history and language; the expressions of culture held in high esteem and the accessibility of these. Culture also influences the structures of families, the types of relationships people have and the shared norms in a community. Political, legal and institutional conditions are to some extent a reflection of the shared norms and understandings of a particular cultural setting.²⁴

Figure 2.2

THE ABS SOCIAL CAPITAL FRAMEWORK



Source: Australian Bureau of Statistics 2004, *Information Paper: Measuring Social Capital — An Australian Framework and Indicators*, Cat. No. 1378.0, Canberra, p. 14.

²⁴ Australian Bureau of Statistics 2004, op. cit.

But heritage places go beyond being a mere backdrop to the concept of social capital. Heritage places engender community involvement and networking, the stories associated with such place develop and reinforce norms, and so on.

2.3 The intrinsic value of heritage

A third approach to the valuation of heritage places suggests that the value of heritage is absolute or intrinsic, such that their worth exists independently of any evaluation by the public,²⁵ and potentially irrespective of any interaction of the public in a social capital sense.

Under this view of value, individual judgements and market prices associated with heritage places would be irrelevant and in fact, misleading, in the determination of the real value of a heritage place.

In effect, this approach views heritage as a merit good.²⁶ The concept of a merit good is a relatively controversial one in economic literature because it relies on government, in allocating expenditure, imposing its own preferences (however derived) for the provision of what it sees as ‘meritorious’ goods and services, without regard for consumer demand (or lack of it). In effect, government decides that the benefits of particular goods are high enough to warrant government provision of funding, even though individual preferences and demand for these goods does not appear to justify such support.²⁷ In the case of heritage, this may be in relation to preserving a particular building or attraction, on the basis of the value of government considers the site provides to the community, even though visitation to the site or knowledge of the site is relatively low.

For the purposes of the economic analysis undertaken in this study, intrinsic value is not relevant because the focus is on value ‘formed only by the instinctive and/or deliberate thoughts and actions of human beings’.²⁸

²⁵ K. McCarthy, E. Ondaatje, L. Zakaras and A. Brooks 2005, *Gifts of the Muse: Reframing the Debate About the Benefits of the Arts*, RAND Corporation; The view of heritage (and culture more generally) as having an intrinsic value appears to be increasingly popular in some circles: J. Holden 2004, *Capturing Cultural Value: How Culture has Become a Tool of Government Policy*, Demos, London; T. Jowell (UK Secretary of State for Culture) 2004, ‘Government and the Value of Culture’, <http://www.dcms.gov.uk>, Accessed 20 September.

²⁶ M. Mazzanti 2002, ‘Cultural heritage as multi-dimensional, multi-value and multi-attribute economic good: toward a new framework for economic analysis and valuation’, *Journal of Socio-Economics*, vol. 31, no. 6, pp. 529–558.

²⁷ Ibid.

²⁸ D. Throsby 2003, ‘Determining the value of cultural goods: How much (or how little) does contingent valuation tell us?’, *Journal of Cultural Economics*, vol. 27, pp. 275–285, p. 278.

Chapter 3

Previous Australian measures of the value of heritage places

This chapter provides an overview of a range of valuation studies undertaken with respect to Australian heritage places.

The valuation of heritage places is an everyday occurrence from an accrual accounting perspective, even if it is often problematic.²⁹

Similarly, cultural assessments of heritage places are also common as part of the listing and development assessment processes. While the cultural assessment of historic heritage may be sound in a theoretical sense, providing a fully articulated model of cultural heritage remains difficult given the multi-dimensional nature of cultural value.³⁰ While economic studies has developed a series of analytical tools and methodologies to evaluate the values and benefits of historic heritage places (see chapter 4), the cultural disciplines and conservation professionals have been ‘challenged to elaborate on existing tools and devise additional tools to evaluate noneconomic, cultural values’.³¹ Much of this can be accounted for a ‘lack [of] a unifying body of theory regarding values or the role of conservation in society’.³² Social and cultural studies have therefore largely emphasises the qualitative research. In any case, ‘The social benefits to the community of investing in property conservation is well established.’³³

What this chapter seeks to do is provide an overview of a range of studies that have sought to quantify the value. These studies can be broadly categorised as seeking to identify the use value of:

- residential buildings;
- commercial buildings; and
- tourist places.

The following sections summarise the key findings from studies that value Australian historic heritage places.

²⁹ In a public context see: P. Stanton and P. Stanton 1997, ‘Governmental accounting for heritage assets: economic, social implications’, *International Journal of Social Economics*, vol. 24, no. 7-9, pp. 988-1006; and J. Blöndal 2003, ‘Accrual accounting and budgeting: Key issues and recent developments’, *OECD Journal on Budgeting*, vol. 3, no. 1, pp. 43-60.

³⁰ D. Throsby 2001, op. cit., pp. 83-86.

³¹ R. Mason 1998, ‘Economics and Heritage Conservation: Concepts, Values and Agendas for Research’, in *Economics and Heritage Conservation*, A meeting organised by the Getty Conservation Institute, December, p. 15.

³² Ibid.

³³ P. Wills and C. Eves 2005, *Heritage Australia: A Review of Australian Material Regarding the Economic and Social Benefits of Heritage Property*, NSW Heritage Office, Sydney, p. 8.

3.1 Residential buildings

Quigley undertook a survey of owners of heritage properties that were affected by heritage controls.³⁴ The survey examined people's perceptions of heritage controls and their impacts on decision making. The conclusions from the survey showed that:

- 60 per cent of respondents that had purchased heritage controlled properties indicated that the heritage listing had not influenced the amount that they were prepared to pay; and
- 80 per cent of respondents who had purchased their property before the heritage controls had come into operation thought that the heritage controls had affected the value of the property. These respondents were evenly divided between those that perceived that the heritage controls had a negative effect and those that thought the effect had been positive.

D'Arcy studied the impact of Victoria's Historic Buildings Council (HBC) registration on property values.³⁵ The study considered the impact that HBC listing has for all places included on the Victorian State Register as at 1986, by comparing the total valuation of properties in 1986 and 1989. Valuation was carried out for residential dwellings in both metropolitan and non-metropolitan areas, with the study showing that:

- for the 97 dwellings in *metropolitan* Victoria included on the HBC listing, the total value increased by 81 per cent compared with a 61 per cent increase for all metropolitan residential properties in the study period; and
- for the 48 dwellings in *non-metropolitan* Victoria included on the HBC listing, the total value increased by 43 per cent compared with a 42 per cent for all non-metropolitan residential properties in the study period.

The study concluded that single dwellings in the metropolitan area are not generally disadvantaged by heritage registration. However in case of the non-metropolitan areas, HBC listing seems to have made little difference to price movements.

Countrywide Valuers in 1992 undertook a study that examined changes in property valuations in Maldon (in the Victorian goldfields) from January 1970 to December 1990 and to ascertain whether the introduction of heritage controls had resulted in any impact.³⁶ The authors concluded that:

the strict heritage controls have had no adverse effect on property values in Maldon. On the contrary, these controls have protected the town and attracted both visitors and property buyers to the area, which has economic and social advantages to the town and the Shire.

Specifically, the authors found that:

- 'notable' dwellings (residential properties subject to heritage controls in the planning scheme) increased in value over the period 1970 to 1990 by

³⁴ J. Quigley 1987, *Incentives for Heritage Listing and the Effects of Heritage Listing on the Value of Residential Properties*, Research Paper, South Australian Institute of Technology, Adelaide.

³⁵ J. D'Arcy 1991, *The Preservation of Historic Buildings and Sites and the Cost Implications*, Melbourne.

³⁶ Countrywide Valuers and Trevor Budge and Associates 1992, *Heritage and Property Valuations in the Shire of Maldon — A Study of the Effects of Planning and Heritage Controls on Property Valuations*, Melbourne.

1844 per cent compared to 1432 per cent for other dwellings in the town (i.e. buildings not subject to heritage controls);

- there was a substantial preference by purchasers to buy historic homes in Maldon. In particular, the ‘notable dwellings’ were in greater demand;
- there were no discernible movements in values immediately following the introduction of the controls; and
- the townships which had a significant stock of heritage buildings and strict heritage controls (i.e. Maldon, Yanckandanda, Clunes and Beechworth), had higher property values than the four townships in the region with minimal heritage controls (Avoca, Dunolly, Heathcote and Newstead).

Penfold studied the impact of heritage controls on prices in four conservation areas in Sydney (i.e. in Ashfield, North Sydney, Waverly and Burwood councils respectively).³⁷ Heritage controls for these conservation areas came into effect between 1982 and 1989. The average sale price was compared in the three year period prior to designation to the three year period after designation in each zone. The study showed that heritage designation appeared to have had a favourable impact on prices in the two conservation zones of Burwood and Ashfield. However in case of the remaining two conservation zones, designation seemed to have made little difference to price movements.

The *Economic Effects of Heritage Listing* study undertaken by the Urban Consulting Group was a major study commissioned by the Commonwealth and State heritage agencies in Australia, and undertaken by a team of urban planners, economists, valuers and architects.³⁸ The study included a literature review, a number of in-depth case studies, a survey of real estate agents, interviews with a wide range of stakeholders in the property market, and an analysis of key regulations. The study concluded, among other things:

The limited quantitative research which has been undertaken relates to the impact of heritage designation on property values within particular sub-markets, for example, specific residential precincts, or certain types of commercial property. These studies suggest that heritage designation per se has little impact on the value of residential property.

The most recent research suggests that other factors such as location, general amenity, level of ethnicity and crime are possibly greater influences on value than heritage designation. A survey of real estate agents active in historic residential areas, undertaken as part of this study, supported the view heritage listing generally has little impact on residential property values. Moreover, the heritage qualities of historic residential property are generally emphasised as a positive attribute in marketing campaigns by developers and agents.³⁹

The study analysed a number of case studies which indicated that the economic effects of heritage listing are influenced by: the nature of the building and its use; the availability and feasibility of alternative uses; the condition of the building; and the location of the building.⁴⁰ As such, the study noted that it is very difficult to

³⁷ V. Penfold 1994, ‘Heritage controls and property values: a study of four Sydney conservation area’, Unpublished thesis, School of Town Planning, University of New South Wales.

³⁸ Urban Consulting Group 1994, *Economic Effects of Heritage Listing*, North Melbourne.

³⁹ Ibid., p. 1.

⁴⁰ Ibid., p. 131.

generalise, and the assessment of economic effect can only be carried out on a case by case basis.⁴¹ The study went on to note that:

Where there is a fall in value associated with listing (as appears to be the case with the Princess Theatre and the Fitzgerald Hotel), then this tends to be a one-time cost, normally borne by the owner of the building at the time of listing. After listing, the property market tends to inform itself of the implications of listing and factor this into value calculation.⁴²

Since this major study, further studies have also tried to quantify the impact of heritage designation on property values. Krastins' 1997 study examined the sale records and council valuations for 100 residential properties in Geelong over a twelve year period from the mid 1980s when heritage controls had first been introduced.⁴³ Krastins' results showed an increase in the value of the buildings with heritage controls of 19.5 per cent over the twelve year period, compared to 6.9 per cent for those properties that were not subject to heritage controls. However, he concluded that non-heritage factors such as street width, location, off-street parking had the most significant impact on property valuation.

A 1999 study by Keck examined the potential impacts of proposed heritage controls on selected properties in the City of Stonnington and City of Monash in Victoria where the owners were objecting to heritage listing in the local planning schemes.⁴⁴ Findings of this report included:

- of the 48 properties proposed for inclusion in the Stonnington Heritage Overlay, the adverse effect on the total property value was estimated at 15 per cent; and
- the greatest incidence of adverse valuation impact would be for those with highest and best use and therefore value related to land alone (26 out of 48 properties fell into this category). The estimated decrease in value, based upon the assumption that the existing buildings could not be removed, was calculated at approximately 20 per cent on average, with an individual decrease ranging from 10 per cent to 60 per cent in one extreme.

Keck concluded that 22 of the 48 properties did not have an alternative highest and best use. In these cases, the added value of land and improvements was in balance and there was no obvious potential for major improvement. He concluded that these properties would suffer little, if any impact on value, but may suffer reduced capital appreciation over time compared to similar properties not subject to heritage controls. The impact of heritage listing could reduce their value by up to 10 per cent when contrasted to their pre-heritage value.

A more recent study by Deodhar in 2004 assessed the market price differential between heritage-listed and unlisted houses in Sydney's upper north shore area (Ku-rin-gai area) using a hedonic price methodology (see box 3.2).⁴⁵ After controlling for other property attributes, the 64 heritage-listed houses commanded a premium of 12 per cent on average. This premium is a measure of the combined

⁴¹ Ibid.

⁴² Ibid., p. 132.

⁴³ K. Krastins 1997, *The Implications of Heritage Listing on Property Valuations: A Case Study of Residential Development in Geelong*, Thesis, Deakin University, Geelong.

⁴⁴ S. Keck 1999, *Heritage Controls and Property Values — A Review at Local Government Level*, Herron Todd White.

⁴⁵ V. Deodhar 2004, *Does the Housing Market Value Heritage? Some Empirical Evidence*, Macquarie Economics Research Papers, No. 3/2004, March.

value that the market places on their heritage character, their architectural style elements, and their statutory listing status. The study also examined the relationship between varying levels of heritage significance by conferring a higher premium to houses with a higher level of significance to the society. The level of heritage significance was also found to have a positive impact on the prices of heritage listed houses.

Box 3.1

ANALYTICAL METHOD 1 — THE HEDONIC PRICING TECHNIQUE

Hedonic pricing is used to derive estimates of value for goods (or services) that can be most properly described as representing a bundle of components or attributes. For example, house prices are affected by a house's bundle of characteristics, which may include on physical attributes of the dwelling (such as number and size of rooms, amenities such as plumbing, condition); on the convenience of access to employment, shopping, and education; and on whether it is part of a heritage suburb or precinct. Other things being equal, the extra price commanded by a house in a historic area would be a measure of the willingness to pay for heritage designation.

The traditional hedonic model defines the two sides of the market – the consumer and the producer:

- The consumer's side, where the value that the consumer places on a particular attribute of a good will be the maximum additional amount that the consumer will be willing to pay for the good, given a small improvement in the attribute of the good and assuming everything else remains unchanged.
- On the production side, firms are assumed to maximise profits, and the supply of goods will be dependent on the attributes of the good produced, profitability, and the cost of supply.

Different socio-economic characteristics of consumers, and different technology and input characteristics of firms will generate many different demand and supply outcomes, which can be used to derive a set of equilibrium prices. Ultimately these outcomes are all compared and simultaneously 'solved' to derive an implicit set of prices for each of the different attributes of the good. An ordinary least squares (OLS) regression or multinomial logit techniques are commonly utilised to assist with this task.

The hedonic pricing methodology has been applied in a variety of circumstances. It is useful in situations where a good is traded in the marketplace, however, direct market information on a particular attribute of that good is unavailable. The strengths of hedonic pricing include that it derives estimates of value using data that is based on real consumer decisions, and also that it can be used to imply valuations for specific attributes of bundled goods.

There are a number of limitations to this technique including its reliance on existing data and attributes that are rarely measured (or measurable). In order for the many different factors to be distinguished, hedonic price techniques are extremely data-intensive since large numbers of detailed observations are needed. It also relies on a freely functioning and efficient property market, so that prices reflect consumers' willingness to pay for different attributes. Finally, hedonic techniques have often proven to be extremely sensitive to model specification.

3.2 Commercial buildings

The 1991 study by D'Arcy (which also looked into residential buildings) looked at the impact of listing on 202 non-residential HBC listed buildings. The value of the listed buildings increased by 34 per cent between 1986 and 1989, against a metropolitan average about 69 per cent for all properties. For country Victoria the

198 listed non-residential properties increased by 38 per cent against an average of 59 per cent for all properties.⁴⁶

A paper written by Thomas examined property development from an investment perspective by weighing up the comparative returns for owners of heritage buildings versus modern buildings, taking account of building costs and long term returns.⁴⁷ The paper concludes:

Market evidence and cost analysis suggest that there is a marginal advantage in building a modern office block compared to recycling a heritage building in the short term, but as a long term investment, recycling heritage buildings can be advantageous. Heritage buildings tend not to age as quickly and require ongoing general maintenance compared to their modern counterpart, that requires expensive upfront refurbishment every fifteen years or so to compete in a competitive modern accommodation market. Cosmetic refurbishment of buildings compounds problems in the future in regard to structural fabric and diminishing returns... [Conversely] Most quality refurbishment in heritage buildings will not date as quickly as their modern counterpart, which is susceptible to market fads.

Part B of the study *The Economics of Heritage Listings*, entitled *The Impacts of Heritage Requirements on the Financial Viability of Individual Development Proposals*,⁴⁸ commissioned by the NSW Heritage Office and prepared by the NSW Division of the Australian Property Institute, aimed to provide guidelines for assessing the economic impact of heritage listing on development schemes. The study examined seven selected case studies in the City of Sydney, where heritage properties have undergone development involving adaptive re-use.⁴⁹ The conclusions of Part B were that the economic viability of property development is:

first and foremost dependent on market related factors which are not generally related to heritage consideration. The identification of unmet market demand, the presence of favourable market conditions, and timing in the market cycle are essential prerequisites for economic success regardless of whether a chosen property is heritage listed or non heritage listed.⁵⁰

Furthermore:

The combination of financial incentive and the commercially-oriented nature of the adaptive reuse schemes in each of the Sydney CBD case studies outweighed any extra heritage-related costs and project risks which arose, thereby resulting in positive economic outcomes each of our CBD examples.⁵¹

3.3 Tourism places

Heritage activities and attractions are also an important part of the use and non-use valuation of heritage. A number of studies have estimated the impact that historic (being a sub-set of cultural) tourism can have on the Australian economy or at designated heritage places.

⁴⁶ J. D'Arcy 1991, op. cit.

⁴⁷ D. Thomas 1994, *Fitout of a Modern Building vs Conservation of a Heritage Building: Comparative Cost Evaluation*, Paper presented at ICOMOS conference, Hobart, May.

⁴⁸ C. Dominy 2001, *The Economics of Heritage Listings: Part B, The Impacts of Heritage Requirements on the Financial Viability of Individual Development Proposals*, Sydney.

⁴⁹ Part A of the study focussed on the public benefits of heritage listing.

⁵⁰ C. Dominy 2001, op. cit., p. 174.

⁵¹ *Ibid.*, p. 175.

Tourism benefits at particular heritage places

Particularly in light of calls for funding of particular sites, there has been an upswing in the estimation of tourism benefits associated with particular sites. For example:

- In 1995, Heritage Victoria estimated that recreational diving in Victoria contributed nearly \$20 million a year to tourism and business incomes noting: ‘the State’s shipwreck resource is a major diving attraction and, as such, it contributes to Victoria’s economic and competitive strengths’.⁵²
- A study of tourism to three heritage Australian mining towns — Maldon (Victoria), Burra (South Australia) and Charters Towers (Queensland) — measured the economic impact of such tourism on the host regions and analysed the motivations and behaviour of the visitors.⁵³ Sample surveys of visitors were carried out in the three towns over the first six months of 2000. At least 500 interviews were conducted in each town, with information being sought on tourist behaviour, impressions and expenditure. Of the \$15 million being spent on tourism across the three regions, the surveys showed that between 20 to 30 per cent of this expenditure is related to visitors wanting to see heritage places.
- A study of Port Arthur in Tasmania found that consumer willingness to pay to go to Port Arthur (i.e. travel and accommodation costs — see box 3.2) totalled \$46.46 million in 2002-03, outweighed the commercial turnover at the site by a multiple of six.⁵⁴ Using a discounted cash flow analysis with a discount rate of 7.5 per cent, the study concluded that the heritage value of the site was \$619 million in 2002-03.
- A study of tourism at three locations in Western Australia considered to have significant cultural heritage values — the cities of Fremantle and Albany and the town of New Norcia — measured the direct yearly tourism expenditure on the host regions and analysed the motivations of visitors through visitor expenditure surveys.⁵⁵ Through these surveys, the study estimated the total tourism expenditure and applied an attribution factor — that is, a factor that measured the proportion of visitors that identified heritage — for each location. Based on this analysis, the study showed that the direct expenditure of around \$81.2 million for Albany, \$27.5 million for Fremantle, and \$1.6 million for New Norcia is attributable to heritage.

⁵² Heritage Victoria 2000, *Victorian Heritage Strategy: Shipwrecks 2005*, Melbourne, p. 9.

⁵³ M. Cegielski, B. Janeczko, T. Mules and J. Wells 2001, *Economic Value of Tourism to Places of Cultural Heritage Significance: A Case Study of Three Towns with Mining Heritage*, CRC for Sustainable Tourism, University of Canberra, Canberra, p. 68.

⁵⁴ B. Felmingham, D. Paulin and B. Page 2004, *Contribution of the Port Arthur Site to the Welfare of Tasmanians*, Draft, University of Tasmania, Hobart, April, p. 21.

⁵⁵ M. Hughes, J. Carlsen and D. Wood 2005, *Assessment of the Economic Value of Heritage Tourism in Three Western Australian Locations*, Heritage Council of Western Australia, June, p. 2.

Box 3.2

ANALYTICAL METHOD 2 — TRAVEL COST ANALYSIS

The travel cost method is an example of a technique that attempts to infer value from observed behaviour. It uses information on visitors' total expenditure to visit a place to derive their demand curve for the place's services. From this demand curve, the total benefit visitors obtain can be calculated. (It is important to note that the value of the place is not given by the *total* travel cost; this information is only used to derive the demand curve.)

The method relies upon a number of assumptions which, if violated, complicate its use:

- that travel costs are a proxy to admission fees;
- that travel must be undertaken solely for the purpose of visiting the site; and
- that people living at the same distance from the place have identical preferences.

These assumptions can often be problematic for the valuation of cultural heritage sites, for example, when trips have multiple purposes rather than a single purpose.

Source: Department of the Environment, Sport and Territories, Department of Finance, and Resource Assessment Commission 1995, *Techniques to Value Environmental Resources: An Introductory Handbook*, Australian Government Publishing Service, Canberra, p. 37. Also see S. Pagiola 1996, *Economic Analysis of Investments in Cultural Heritage: Insights from Environmental Economics*, Environment Department, World Bank, June, p. 7.

Aggregate tourism activity at heritage places

A number of surveys have also been undertaken regarding tourists and their visitation at heritage places.

Box 3.3

DOES THE HIGH PATRONAGE NECESSARILY REFLECT HIGH VALUE?

It is difficult to apportion the degree to which heritage places specifically drive tourism attraction and expenditure. For example, Foo and Rossetto note that:

'It is apparent that while approximately one in three cultural visitors went to an historic or heritage site while they were in Australia, they did so with a general level of interest (42 per cent very interested, 43 per cent fairly interested and 14 per cent somewhat interested). This finding supports the previous proposition that although visitor numbers to these sites exceed those to other sites, it is not necessarily the case that inbound visitors seek these experiences more than other experiences. Rather it is likely, at least to some extent, to be the availability of these attractions that makes them popular to inbound visitors.'

Indeed:

'Authors elsewhere have noted that not all visitors to cultural attractions can automatically be classified as cultural tourists. Richards argues that many tourists "consume cultural attractions as part of a wider tourism experience (such as a beach holiday), and these tourists are not driven by any particular cultural motives" (Richards, 1996, p. 270). Prentice points to the importance of "non-specific or general factors" in attracting tourists to heritage attractions when on holidays (Prentice, 1993, p. 95). Others go so far as to suggest that the term cultural tourism is used indiscriminately and is often applied "to situations as diverse as trips where culture is the main activity and the prime motivation, through to trips where it is a secondary activity and an incidental motivation" (Hughes, 1996, p. 708).'

However, attempts have been made to determine the degree of expenditure at particular places that can be attributed to historic heritage. For example:

- Cegielski, Janeczko, Mules and Wells estimated that between 20 to 30 per cent of tourist expenditure in Maldon (Victoria), Burra (South Australia) and Charters Towers (Queensland) is related to visitors wanting to see heritage places; and
- Hughes, Carlsen and Wood estimate that historic heritage is the driver behind 63 per cent of tourist expenditure in Albany, 73 per cent in Freemantle and 75 per cent in New Norica.

However, where such estimates of attribution are provided they tend to be difficult to verify.

Source: L. Foo and A. Rossetto 1998, *Cultural Tourism in Australia — Characteristics and Motivations*, BTR Occasional Paper Number 27, Bureau of Tourism Research, Canberra, pp. 54-55; M. Cegielski, B. Janeczko, T. Mules and J. Wells 2001, *Economic Value of Tourism to Places of Cultural Heritage Significance: A Case Study of Three Towns with Mining Heritage*, CRC for Sustainable Tourism, University of Canberra, Canberra, p. 68; M. Hughes, J. Carlsen and D. Wood 2005, *Assessment of the Economic Value of Heritage Tourism in Three West Australian Locations*, Heritage Council of Western Australia, Perth, p. 28.

Both domestic and international tourists are major visitors to historic heritage places (table 3.1). The table shows that in 2004, 3.3 million Australian travelers on overnight trips undertook at least one history or heritage related activity. An additional 1.9 million domestic travelers on daytrips undertook at least one history or heritage related activity. On average, about 27 per cent of all international visitors visited historic heritage places.

Table 3.1

NUMBER OF VISITORS AT HISTORIC HERITAGE PLACES

	Domestic day trip		Domestic overnight trip		International	
	Number ('000)	% of total day trips	Number ('000)	% of total overnight trips	Number ('000)	% of total international visitors
1998	3476	2.3%	4216	5.7%	n/a	n/a
1999	3297	1.9%	3670	5.0%	1272	31%
2000	2543	1.6%	3014	4.1%	1449	32%
2001	1974	1.4%	2880	3.9%	1366	31%
2002	2121	1.5%	2398	3.2%	1207	27%
2003	2698	1.9%	3227	4.4%	1197	27%
2004	1993	1.5%	3308	4.5%	1305	27%

Source: Bureau of Tourism Research, International Visitors Survey and National Visitors Survey, unpublished data.

Indeed, some heritage places are tourist destinations in and of themselves. Table 3.2 shows the top ten most visited attractions by international guests, with historic heritage comprising three out of this list (Sydney Opera House, The Rocks and Centrepoint Tower) and at least six in the list having some degree of historic heritage as part of the visit.

Table 3.2

TEN MOST VISITED ATTRACTIONS FOR INTERNATIONAL VISITORS (1999)

Attraction	Total visitors to attraction	Is it a historic heritage place?
Sydney shopping	1 642 000	Parts
Darling Harbour	1 576 000	Parts
Sydney Opera House	1 427 000	Yes
The Rocks	1 180 000	Yes
Sydney Harbour cruise	867 000	Parts
Bondi Beach	780 000	Parts
Blue Mountains	754 000	Parts
Centrepoint Tower	685 000	Yes
Great Barrier Reef and islands	658 000	No
Theme parks on the Gold Coast	658 000	No

Note: The Blue Mountains and the Great Barrier Reef are World Heritage places and include some historic heritage components.

Source: B. Henrick and L. Johnson 2000, 'Visiting Australia's popular attractions — Measuring international day and overnight visitor activities', *Tourism Research Report*, vol. 2, no. 2, pp. 7-12, p. 9.

As a consequence, historic heritage places of tourism interest capture revenues and economic activity associated with their use (table 3.3). For example, in 2004 domestic and international tourists who visited a heritage place spent an estimated \$7.8 billion on trips in which they visited at least one historic heritage place (see table 3.4).

Table 3.3

ENTRY FEES PAID BY TOURISTS AT HERITAGE PLACES (\$MILLION, 2004 PRICES)

	1998	1999	2000	2001	2002	2003	2004
Domestic day	\$14.53	\$15.94	\$15.38	\$13.25	\$12.79	\$12.00	\$11.10
Domestic overnight	\$46.43	\$44.89	\$44.85	\$43.65	\$42.98	\$40.50	\$40.00
International	\$3.90	\$4.64	\$5.09	\$4.63	\$4.40	\$4.20	\$3.30
TOTAL	\$64.86	\$65.48	\$65.33	\$61.53	\$60.18	\$56.70	\$54.40

Note: Values are for entry fees while 'visiting historic or heritage buildings, sites or monuments'

Source: Bureau of Tourism Research, *International Visitors Survey* and *National Visitors Survey*, unpublished data.

Table 3.4

TOTAL TRIP EXPENDITURE BY VISITORS WHO ATTEND HISTORIC HERITAGE PLACES

	Domestic day trip		Domestic overnight trip		International	
	Visits to historic heritage places	% of total day trips	Visits to historic heritage places	% of total overnight trips	Visits to historic heritage places	% of total international visitors
1998	\$298 million	2.4%	\$4,443 million	11.3%	n/a	n/a
1999	\$308 million	2.2%	\$4,044 million	10.2%	\$3,869 million	39%
2000	\$261 million	1.8%	\$3,594 million	8.7%	\$4,615 million	41%
2001	\$184 million	1.5%	\$3,187 million	7.7%	\$5,064 million	43%
2002	\$210 million	1.7%	\$2,759 million	6.6%	\$4,610 million	38%
2003	\$293 million	2.4%	\$3,498 million	8.6%	\$4,446 million	39%
2004	\$169 million	1.5%	\$3,439 million	8.6%	\$4,199 million	36%

Note: Values rounded to the nearest \$1 million and so may not sum; excludes expenditure on motor vehicles (domestic tourists) and prepaid airfares and international packages (international tourists).
Source: Bureau of Tourism Research, International Visitors Survey and National Visitors Survey, unpublished data.

In response to a request to make recommendations for policy and research, in 2000 the BTR offered a broad response and suggested:

that serious consideration be given to the collection of data and the development of reliable estimates of the economic impact of heritage tourism activities, at both national and regional levels. Reliable estimates would assist in effective policy development, raise awareness in tourism and in government of the economic benefits which accrue from Australia's heritage assets, and provide a benchmark against which to assess future industry performance.⁵⁶

While Cultural Ministers Council Statistics Working Group has been looking at the impact of cultural activities generally,⁵⁷ there has been little emphasis on heritage.

3.4 Summary

The research on the value of Australian historic heritage places paints a reasonably consistent picture in a couple of prominent ways:

- on the whole, and rebutting the common perception provided by the media, property values have not been negatively affected by heritage listing (i.e. the impact has been neutral or positive) when done in a systematic manner. This reflects the view that it is the collective heritage ambience, created by a systematic listing strategy, that is the attraction rather than the benefits created by the protection of an individual residential or commercial place; and
- in all three sectors surveyed, the studies emphasise (either explicitly or implicitly), that the benefits that accrue from private conservation activities are also socially beneficial. This has important implications for the role of public intervention; creating incentive structures that encourage private participation should be an important policy focus.

To some degree the ability to draw broader conclusions is limited by the relative unsophistication of the studies (i.e. many studies have described in detail methodological techniques — e.g. travel cost techniques, contingent valuation, choice modeling — rather than actually using them). In some ways, this lack of sophistication reflects the fact that historic heritage places have not been a major focus of mainstream quantitative research (often subsumed in general research into the cultural sector), and there has been a lack of funding to stimulate heritage specific research.⁵⁸

⁵⁶ P. Robins 2000, 'BTR research relevant to heritage tourism: Past findings and future potential' in *Conference Proceedings — Heritage Economics: Challenges for Heritage Conservation and Sustainable Development in the 21st Century*, Australian Heritage Commission, Canberra, pp. 93-97, p. 96.

⁵⁷ See L. Heaney and U. Salma 2002, *Economic Impact of Cultural Tourists in Australia*, Bureau of Tourism Research, Canberra.

⁵⁸ However, even in the United Kingdom, which as been assumed to have had a more intensive appreciation for historic heritage, a recent survey only identified 33 valuation studies — eftec 2005, *Valuation of the Historic Environment — The Scope for Using Results of Valuation Studies in the Appraisal and Assessment of Heritage-related Projects and Programmes*, Report to English Heritage, the Heritage Lottery Fund, the Department for Culture, Media and Sport and the Department for Transport, p. 7.

Chapter 4

New evidence regarding the value of protection for heritage places in Australia

This chapter presents the findings from a survey of 2024 Australians conducted in September 2005. The survey sought both to:

- *quantify the values that people attach to a number of attributes of protection afforded to heritage places; and*
- *identify people's views on a number of matters which would point to the social capital associated with heritage place protection.*

In order to gain a better understanding of the value provided by historic heritage the Heritage Chairs and Officials of Australia and New Zealand commissioned The Allen Consulting Group, with the assistance of ACNielsen, to undertake an online survey of 2024 adult Australians. The survey sought to:

- quantify the values that people attach to a number of attributes of protection afforded to historic heritage places (this was done using a technique called 'choice modelling'); and
- identify people's views on a number of matters, which would in turn point to some elements of social capital affected by historic heritage place protection.

These two outcomes are discussed in turn.

4.1 The value of heritage protection

Two approaches were taken to ascertain the value of heritage protection from adult Australians:

- simple attitudinal questions; and
- choice modelling.

Simple attitudinal questions

One question in the survey asked people to agree or disagree with a series of statements. As shown in table 4.1, some of the statements can be mapped against the types of values identified in figure 2.1.

Table 4.1

COMMUNITY VIEWS AND PERCEPTIONS OF HERITAGE-RELATED VALUES

Value type	Statement	'Strongly agree' and 'Agree'	'Strongly disagree' and 'Disagree'	Neither agree or disagree
Direct use value	Looking after heritage is important in creating jobs and boosting the economy	56.1%	11.0%	32.9%
Indirect use value	My life is richer for having the opportunity to visit or see heritage	78.7%	4.6%	16.8%
Option value	It is important to protect heritage places even though I may never visit them	93.4%	1.5%	5.0%
Existence value	Heritage is part of Australia's identity	92.3%	5.3%	2.3%
	The historic houses in my area are an important part of the area's character and identity	80.2%	5.2%	14.5%
Other non-use values	It is important to educate children about heritage	96.9%	0.3%	2.8%

Of the statements identified in table 4.1, given the statistics presented in chapter 3, one of the most interesting result relates to the degree to which people do not see the economic value associated with heritage-related tourism. In particular, only 16.6 per cent of the community strongly agrees with the statement 'Looking after heritage is important in creating jobs and boosting the economy'.

Similarly of interest is a comparison of Australian attitudes with attitudes expressed to the same (or at least similar questions) in a United Kingdom survey (see table 4.2, next page).⁵⁹ The comparison demonstrates that Australians views about historic heritage are comparable (and even more favourable in a number of instances) with those people from the United Kingdom, even though the age and nature of the heritage places in Australia and the United Kingdom markedly differ (and it is often claimed that people from Europe value heritage more than Australians).

⁵⁹ MORI 2003, *Making Heritage Count?* Research Study Conducted for English Heritage, Department for Culture, Media and Sport and the Heritage Lottery Fund, October.

Table 4.2

COMPARISON OF AUSTRALIAN AND UNITED KINGDOM ATTITUDES (PROPORTION OF RESPONDENTS WHO AGREED OR STRONGLY AGREED WITH THE FOLLOWING STATEMENTS — PER CENT)

Australian question (and United Kingdom question in brackets where the question is different)	Australia	United Kingdom
It is important to educate children about heritage	96.9	95.0
It is important to keep historic features wherever possible when trying to improve towns and cities	94.7	91.7
Built heritage can mean small and modest places as well as grand historic buildings and churches (Heritage can mean my local area as well as historic castles and stately homes)	92.8	89.7
The historic buildings in my local area are worth saving and are important parts of heritage (The heritage in my local area is worth saving)	84.1	86.0
Celebrating heritage is important	81.5	76.0
Heritage can mean recent as well as old buildings	63.4	59.3
I don't know what heritage activities are taking place in my area	39.7	60.0
There's never any information on the heritage topics of interest to me	21.2	30.0
Australia's heritage is not relevant to me or my family (Heritage is not relevant to me or my family)	5.0	12.3

Source: MORI 2003, *Making Heritage Count?* Research Study Conducted for English Heritage, Department for Culture, Media and Sport and the Heritage Lottery Fund, October, pp. 23-26. Note: The MORI survey was of Bradford, Cornwall and London. Survey responses do not appear to be weighted.

Overall, the Australian survey indicates that the majority of the community believes that inadequate support is provided to heritage conservation (see figure 4.1). In essence, the majority of the community believes that there are benefits from additional government commitment to heritage conservation.

Figure 4.1

DO YOU THINK THAT ENOUGH IS BEING DONE TO PROTECT HISTORIC HERITAGE ACROSS AUSTRALIA?

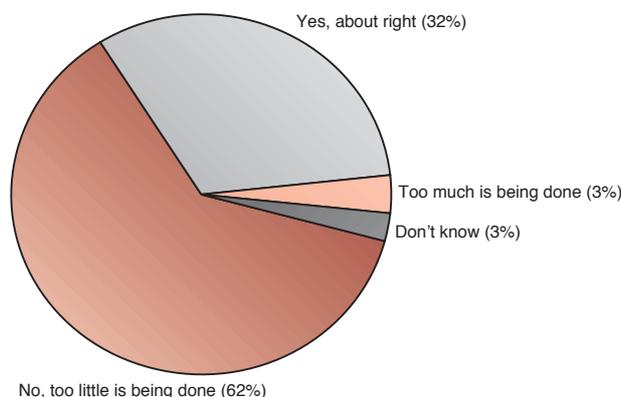
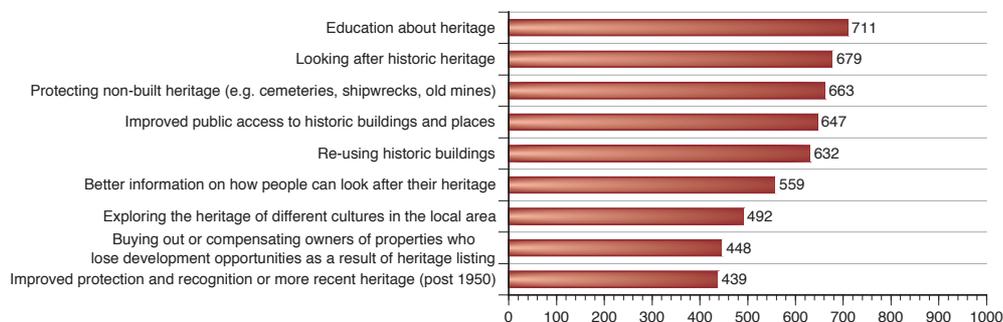


Figure 4.2 shows the community’s preference for where additional government money could be spent. Overall, additional resources should be directed towards education about heritage, looking after historic heritage, protecting non-built heritage, and improving accessibility to historic places.

Figure 4.2

IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON?



Note: The maximum number of units for a category is 1000, which is equivalent to 100 per cent of respondents ranking the category as their first priority. The lower bound may vary because of the opportunity provided to respondents to nominate an optional category. In practice, the lower bound is close to 100 units.

Several individual characteristics and the related responses were evaluated from the survey responses. The survey asked people to identify whether they were currently own or live in a heritage-listed property. These individuals, while comprising a small percentage of all respondents, are more willing to support heritage protection (box 4.1). An interesting result from the survey showed that those who own or live in a heritage-listed property had similar preferences as non-owners for allocating additional money to ‘Buying out or compensating owners of properties who lose development opportunities as a result of listing’.

Box 4.1

VIEWS OF THOSE WHO OWN OR LIVE IN A HERITAGE-LISTED PROPERTY

The survey asked people to identify whether or not they own or live in a heritage-listed property. These respondents comprised 3 per cent of the respondents. The survey found that those who own or live in a heritage property are more likely to:

- consider that not enough is being done across Australia (75 per cent versus 62 per cent for the remaining sample);
- consider historic buildings in their local area are worth saving and are important parts of heritage (92 per cent who strongly agree or agree versus 84 per cent for the remaining sample); similarly
- consider historic houses in their local area are an important part of the area's character and identity (92 per cent who strongly agree or versus 79 per cent for the remaining sample); and
- know what heritage activities are taking place in their area.

An interesting result is that these individuals have similar preferences to non-heritage listed property owners for distributing additional money for 'Buying out or compensating owners of properties who lose development opportunities as a result of heritage listing'.

Responses by different age groups showed that while there was some commonality in the responses given by each of the age groups, there were a number of differences (box 4.2).

Box 4.2

SURVEY RESPONSES BY AGE GROUP

Overall, responses by age group (youth, middle age and senior) showed that all age groups considered that not enough was being done to protect historic heritage and that heritage plays an important part in Australia's culture. Other responses from the survey showed that:

- seniors would prefer to direct additional funding to places of national significance (71 per cent) compared with around 56 per cent for those that are younger;
- seniors are more likely to consider that looking after our heritage is important in creating jobs and boosting the economy (62 per cent compared with around 52 per cent of those who are younger);
- the youth are less likely to know what heritage activities are taking place in their local area (29 per cent) compared with seniors (52 per cent);
- up to 30 per cent of the youth group thought that there was never enough information on the heritage topics of interest compared with around 17 per cent with those aged over 36 years of age.

The three age groups had similar rankings for allocating additional money to the ten choices that they had available in the survey.

Note: Age groups were defined as: youth (18 to 34 years of age); middle aged (35 to 54 years of age) and senior (55 years of age and above).

Choice modelling

Choice modelling (see box 4.3 and appendix B for an overview of the technique) was undertaken to look behind general statements about heritage to see the degree to which the population is willing to financially support the call for a greater commitment to heritage protection, and which historic heritage conservation outcomes they particularly value.⁶⁰

General observations on how people value aspects of heritage conservation

Using the preferred form of choice model, all the heritage protection attributes (*Cost, Places Protected, Condition, Accessibility, Age Mix and Development Control*) are statistically significant in explaining respondent choice. This is important because it means that, on average, survey participants considered each of the six attributes in making their choices.

The general conclusions from the choice modelling are:

- Respondents were conscious of the financial impost a heritage levy would mean for them should they choose a different level of heritage protection than currently provided.
- Respondent utility⁶¹ is increased by:
 - an increase in the number of heritage places protected;
 - an increase in the proportion of places that are in good condition; and
 - an increase in the proportion of places that are accessible to the public.
- Respondents prefer heritage protection outcomes in which there is a greater mix of young and old places, relative to outcomes where most places are over 100 years old.
- As the assumed level of Development Control under the ‘no change’ option is ‘demolition permitted subject to assessment’:
 - a shift away from the status quo to a tighter control policy of ‘no modifications permitted’ would reduce utility; but
 - intermediate control policies where minimal or substantial modifications are permitted are shown to increase utility.

⁶⁰ Choice modelling has been used to measure the value of other forms of heritage in Australia — J. Rolfe and J. Windle 2003, ‘Valuing the protection of Aboriginal cultural heritage sites’, *Economic Record*, vol. 79, Special Issue (June), pp. S85-S95.

⁶¹ ‘Utility is the level of satisfaction that a person gets from consuming a good or undertaking an activity. Utility has an important psychological component because people obtain utility by getting things that give them pleasure and by avoiding things that give them pain.’ — R. Pindyck and D. Rubinfeld 1995, *Microeconomics*, 3rd ed., Prentice Hall, New Jersey, p. 85.

Box 4.3

ANALYTICAL METHOD 3 — ‘CHOICE MODELLING’ AND THE SURVEY OF HISTORIC HERITAGE VALUES

Choice modelling involves eliciting a respondent's stated preference in a hypothetical setting. Used commonly in the natural resources field, and by consumer product companies when developing new goods and services, survey respondents are presented with several different sets of two or more resource use options and asked to indicate which option they prefer in each of these 'choice sets'. One of the resource use options usually corresponds to the do-nothing option and is held constant over all sets of choices. The levels of the attributes characterising the different options varies according to an 'experimental design'. In many valuation applications, one attribute always involves a monetary payment and there would typically be two or more attributes. By observing and modelling how people change their preferred option in response to the changes in the levels of the attributes, it is possible to determine how they trade-off between the attributes. In other words, it is possible to infer people's willingness to pay some amount of an attribute in order to achieve more of another.

In this case, the survey presented respondents with a series of choice sets in which they were asked to indicate their preferred option. The attributes related to:

- the number of heritage places protected from loss (*Places Protected*)— one aspect of managing our heritage is to protect important places from being lost. Listing places on an official heritage register is one way of helping this to happen. But it does not guarantee against loss;
- condition and integrity of places (*Condition*) — this refers to the: structural and physical soundness of a place; and whether the place has been preserved in a way that is faithful to the original features of the place. Places in poor condition may become an 'eyesore' and a public safety hazard. Similarly, places that have been poorly restored and managed may not maintain their heritage character;
- the age mix of places (*Age Mix*) — this attribute is a measure of the proportion of listed places that come from different historical periods;
- public accessibility (*Accessibility*) — this refers to whether or not the public is able to visit a historic place and get a hands-on experience at the place (e.g. photography, guided tours, workshops, open days, etc). Accessibility is more than just being able to view a place. It includes the opportunity to get a deeper appreciation of the place's value and meaning;
- development controls (*Development Control*) — this attribute refers to the level of controls on development in and around heritage places (including buildings, gardens, monuments, etc). Some form of control is necessary to protect heritage places, but the level of control could vary depending on the heritage outcomes being sought; and
- the respondent's additional levy payment each year (*Cost*) — the amount of money that the respondent would be required to contribute each year via a levy to achieve the outcomes specified by a particular option.

By specifying different values for each of the attributes, different policy alternatives were constructed for managing the national system of heritage protection, and alternative 20 year outcomes for heritage conservation were specified. In this case, each choice set had three options, including a 'no-change' option and two alternatives. The no-change option referred to the outcomes that would eventuate if the current system of heritage protection remained intact, with no additional funding made available. It was included in the choice experiment as a benchmark against which to measure respondents' willingness to pay for changes in attribute provision.

The attributes and their values were developed by The Allen Consulting Group, in conjunction with representatives of the Heritage Chairs and Officials of Australia and New Zealand, following focus group meetings in Perth, Sydney and Dubbo.

Eight individual characteristics were included in the modelling to help explain the variation in preferences across individuals, of which five⁶² were found to be statistically significant:

- *Gender* — males are, on average, less willing than females to support change from the status quo level of heritage protection.
- *Pro heritage* — people with a pro heritage disposition (i.e. if in the past 12 months the respondent has had any affiliation with heritage organisations, been a member of local council or donated time/money to heritage causes) are more likely to support additional heritage protection.
- *Heritage house* — people living in heritage homes are, on average, more willing to support heritage protection.
- *Education* — less educated respondents are less willing to support additional heritage protection.
- *Income* — the willingness to pay for additional heritage protection increases with income.

Implicit prices for historic heritage conservation

The choice modelling allows implicit prices to be assigned to each of the changes associated with the attributes. Table 4.3 summarises the implicit prices estimated for each attribute, with a brief description following.

Table 4.3

ATTRIBUTE IMPLICIT PRICES

Attribute	Annual price per person	Units
Places protected	\$5.53	per 1000 additional heritage places protected
Condition of places	\$1.35	per 1% increase in the proportion of places in good condition
Age mix of places	Minus \$0.20	per 1% increase in the proportion of places that are over 100 years of age
Accessibility of places	\$3.60	per 1% increase in the proportion of places that are publicly accessible.
Development control		
- Change to level 1	\$39.50	Change from 'demolition permitted' to 'substantial modifications permitted but no demolition'.
- Change to level 2	\$53.07	Change from 'demolition permitted' to 'minor modifications permitted only'.
- Change to level 3	\$2.38	Change from 'demolition permitted' to 'no modifications permitted'.

⁶² The three socio-economic characteristics found not be significant at the 5 per cent level were: Age, Metropolitan (versus regional place of residence) and Citizen (Australian citizenship versus other nationality).

Average willingness to pay for the *protection of additional places from loss* is estimated to be \$5.53 per person each year for every 1000 places protected. While this does not seem to be a substantial sum of money, 1000 additional places represents only about a 0.5 per cent increase in the current inventory of listed places.

Respondents are also willing to pay for improvements to the *condition and public accessibility of places*.

- A one per cent increase in the proportion of places in *good condition* is valued at \$1.35 per person per year (the assumed 'no change' level is 15 per cent in good condition by 2020).
- A one per cent increase in the proportion of *places that are accessible* to the public is valued at \$3.60 per person per year (the assumed 'no change' level is 5 per cent by 2020).
- This result indicates that people, on average, value accessibility more highly than condition.

With respect to *Age Mix*, respondents signaled a preference for a mix of places from old and more recent periods. The results indicate that an increase in the proportion of heritage places exceeding 100 years old would *reduce* respondent welfare by \$0.20 per year for every 1 per cent increase in the proportion of places aged 100 years or more. The 'no change' level for this attribute was an 85:15 mix of old and new places.

Development Control was included in the choice experiment because focus group discussions during the design phase of the questionnaire revealed a mix of public opinion about the merits of more stringent controls on what modifications can be made to heritage places. In the background information provided with the questionnaire, survey participants were told that:

Some form of control is necessary to protect heritage places, but the level of control could vary depending on the heritage outcomes being sought. Under the current system, substantial modifications are permitted to heritage places, although approval for demolition is rare. Over the next 20 years, demolition approvals may become more common as it is becoming more difficult to control development.

Thus, the 'no change' level for this attribute is 'demolition permitted subject to assessment.' Based on the focus group discussions, it was hypothesised that a move to more stringent development controls would be viewed as a cost by many respondents, either incurred personally (for those living in a heritage listed property) or indirectly (due to restrictions on what could be built in heritage areas). However, the results indicate otherwise.

On average, respondents are willing to pay \$39.50 per person per year to change the level of development control from one of 'demolition permitted' to a slightly more stringent protection policy of 'substantial modifications permitted — but no demolition'. Respondents are willing to pay an additional \$13.57 per person for a further tightening of controls such that only 'minor modifications' are permitted. However, going the next step to 'no modifications permitted' reduces utility. Relative to the 'no change' scenario in which demolition is permitted, respondents are only willing to pay \$2.38 for this scenario. These results suggest that people perceive development controls to be an important policy instrument for protecting

heritage and are not in favour of demolition but do value a system that allows property developers/owners the flexibility to undertake minor modifications.

Valuation of alternative historic heritage outcomes

The implicit prices associated with the attributes (table 4.3) allow a wide range of different outcome scenarios to be evaluated in terms of respondent willingness to pay for changes relative to a ‘no change’ scenario.

Table 4.4 provides an illustrative example of how the implicit prices can be used in this way.

- The second column outlines the assumed current level of each attribute (as provided to respondents in the questionnaire).
- A hypothetical package of attribute changes — to be delivered by 2020 — is listed in the third column.
- The unit values for each of these changes are listed in column four.
- The last column contains the average amount respondents are willing to pay per person, each year, for the change. In this example, on average, people are willing to pay slightly more than \$105.90 each year for a relatively modest package of changes. When aggregated to the national population aged 18 years or older, this value equates to \$1.6 billion per annum.⁶³

⁶³ This value is a gross benefit. The costs of achieving the changes detailed in table 4.5 would need to be netted off this figure to determine the net value of the policy. Given that costs would accrue through time, this analysis should be performed within a benefit-cost framework, with an appropriate discount rate applied.

Table 4.4

EXAMPLE SCENARIO VALUATION

Attribute	Current level	Change by 2020	Implicit price (per person, per year)	Units of attribute change	Annual aggregate value (per person)
Places protected from loss	200 000 places on heritage lists ^a	8000 places	\$5.53	per 1000	\$44.27
Proportion of sites in good condition	20%	20% point increase	\$1.35	per 1% increase	\$27.04
Age Mix (proportion of sites over 100 years old)	80%	15% point reduction	\$0.20	per 1% reduction	\$3.04
Proportion of places accessible to the public	10%	5% point increase	\$3.60	per 1% increase	\$17.98
Development Control	Substantial modifications permitted	Only minor modifications permitted	\$13.57		\$13.57
TOTAL					\$105.90

^aThe figure of 200 000 is for context purposes only as many places on heritage lists are not guaranteed of protection.

4.2 Indicators of heritage places' contribution to social capital

As noted earlier, the Productivity Commission has previously stated that:

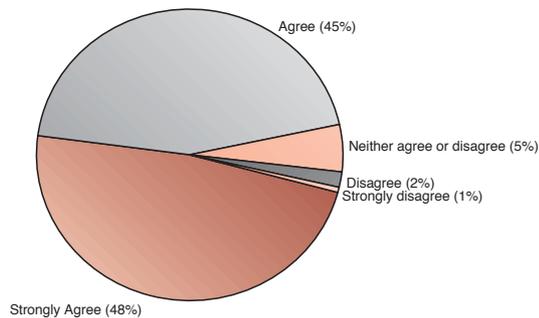
The social capital of a society includes the institutions, the relationships, the attitudes and values that govern interaction among people and contribute to economic and social development ... it is the glue that holds [institutions] together. It includes the shared values and rules for social conduct ... and a common sense of 'civic' responsibility that makes society more than just a collection of individuals.⁶⁴

The culture of a society is one of the underlying conditions upon which social capital sits.⁶⁵ In this respect, it is understandable that 93 percent of the community see heritage as forming part of Australia's identity (figure 4.3).

⁶⁴ Productivity Commission 2003, op. cit., p. ix

⁶⁵ Australian Bureau of Statistics 2004, op. cit., p. 14.

Figure 4.3

COMMUNITY (ADULT) RESPONSE TO 'HERITAGE IS A PART OF AUSTRALIA'S IDENTITY'

An important indicator of social capital is reciprocity (i.e. giving and taking), which is related to the concept of altruism: 'Actions that may be seen as demonstrating reciprocity include contributing time or money to the community, making charitable donations, and sharing support among friends and family'.⁶⁶ The degree to which reciprocity is evident in a heritage context is shown in table 4.5.

Table 4.5

INDICATORS OF SOCIAL CAPITAL

Form of reciprocity	Percentage of adult population
Indicators of heritage reciprocity	
Volunteered your time for heritage activities	9.3%
Donated to heritage causes in the last 12 months	10.1%
Indicators of community support for heritage activities	
Member of a historic society or club	4.1%

Note: These indicators correspond to indicators of social capital (i.e. 1.1.2.2— Donating time or money) identified in Australian Bureau of Statistics 2004, *Information Paper: Measuring Social Capital — An Australian Framework and Indicators*, Cat. No. 1378.0, Canberra, p. 32.

Common purpose — comprised of: social participation; civic participation; community support; friendship; and economic participation — is another element of social capital. In this respect, participation in a historic society or club is one indicator of community support, and the survey showed that 4.1 per cent of the adult population currently are members of a historic society or club (see table 4.4).

While the survey results presented in this section are useful in pointing to the degree of social interaction regarding historic heritage matters, their value as standalone indicators is limited at this time. However, their value will emerge if the indicators are monitored over time.

⁶⁶ Ibid., p. 31.

Appendix A

Abbreviations

CBD	central business district
CM	choice modelling
HBC	Historic Buildings Council
IP	implicit price
MNL	multinomial logit
NA	not available
OLS	ordinary least squares
OECD	Organisation for Economic Co-operation and Development
WTA	willingness-to-accept compensation
WTP	willingness-to-pay

Appendix B

Choice modelling technical details

Choice modelling (CM) involves eliciting people's stated preference for different options in a hypothetical setting. The experiment endeavours to replicate a market setting, where people are confronted with the choice of various products that are characterised by specific attributes and an acquisition price. Being a stated preference technique, CM is capable of eliciting respondent preferences for new products (or outcomes) that do not currently exist in the market place.

This study applied the CM technique to examining community preferences for different heritage products (or outcomes) to be delivered over the next 20 years. The choice task required respondents to choose one outcome from a set of several possible alternatives (known as a choice set). Respondents were presented with a series of eight choice sets. Each choice set has three options, including a 'no change' option — which describes the heritage outcomes associated with continuing the current level of funding and management — and two change options which constituted different heritage outcomes. The change options are generated by varying the levels of each attribute according to an experimental design.

The pattern of observed choices are a rich source of information about how respondents make trade-offs between the attributes. The steps to designing the questionnaire, analysing the data and calculating attribute values are outlined in this appendix.

The CM study involved a number of methodological steps, including:⁶⁷

- policy context definition;
- attribute selection and definition;
- setting the attribute levels;
- questionnaire design;
- development of an experimental design;
- surveying the respondents; and
- analysing the results.

Each of these steps are described below.

B.1 Defining the policy context

The valuation task was designed to value improvements (or reductions) in heritage outcomes at the margin. It did not attempt to estimate the total value of heritage. Marginal values are typically more useful to policy makers than total values in providing guidance about the appropriate *level* of investment in heritage protection. The policy question is not whether heritage should or should not be protected —

⁶⁷ J. Bennett 1999, op. cit.

rather it focuses on 'how much' heritage should be protected and the Australian community's value for changes in the level of protection.

The CM method is structured around valuing changes at the margin. The technique presents respondents with expected outcomes associated with the *status quo* system of heritage management and funding. This serves as a benchmark against which alternative options are evaluated involving different levels of heritage protection.

The issue of 'how much' is accompanied by questions about 'what type' of heritage protection should be pursued. CM is able to provide insight about how people trade-off one attribute against another and the values they place on each attribute. This information is useful for evaluating the costs and benefits of different types of heritage outcomes.

B.2 Defining the attributes

Appropriate selection of attributes is critical for the successful application of CM. The attributes must have relevance to policy makers and be meaningful to respondents. While historic heritage is commonly cited as generating aesthetic, spiritual, social, historic and symbolic values, these factors are difficult to quantify in physical terms. The linkages between changes to the cultural landscape and the measurable, subsequent impact on these values is difficult to define. Thus, attempting to define attributes in terms of the above factors is not particularly helpful. The approach taken by this study was to explore what policy-relevant attributes (those that can be managed and manipulated) contribute to peoples' values.

The selected attributes must also, as far as possible, be mutually exclusive such that respondents do not associate the increased provision of one attribute with higher or lower provision of another.

Four focus groups were undertaken in June and July 2005 to assist with attribute selection and definition. Two groups were held in Perth and the others in Sydney and Dubbo. These locations were chosen in order to gain a better understanding of the views and perceptions of individuals living in both capital cities and regional/rural areas.

Three focus group meetings were used to scope out aspects of heritage that people viewed as being important to them. The groups comprised seven to nine people each, selected on the basis of gender (with an equal representation of males and females) and age (each group generally representing a balanced mix of individuals between 18-70 years of age).

The scoping process involved asking participants what criteria they used in 'valuing' historic heritage, the perceptions about the importance of various attributes, the strengths and weaknesses of the current heritage protection system and issues related to the payment vehicle. Holding the focus groups across a number of geographic locations allowed a cross-section of viewpoints to be gathered.

The focus group discussions resulted in the definition of five heritage attributes and one 'money' attribute, specified as an annual heritage levy that would be used to fund additional heritage protection. The final set of attributes selected for the CM experiment were:

- number of additional heritage places protected from loss;
- the proportion of listed places in good condition and high integrity;
- the age mix of places protected;
- the proportion of listed places that are accessible to the public; and
- the level of development controls.

Table B.1 provides descriptions of these attributes, as presented in the questionnaire. The groups indicated that heritage places should, as far as possible, be accessible to the public and able to be appreciated by all. There was a strong sentiment that heritage conservation programs should be targeted, conserving a representative selection of high quality and unique places from past eras rather than duplicating efforts by protecting multiple examples of the same. There were calls for diversity in the type and age of places protected, particularly with reference to buildings. All groups supported the need to protect heritage for ‘our children’ and future generations. There was a perception that heritage was an important way to educate children about our past.

Table B.1

HERITAGE ATTRIBUTES

Attribute	Description
Number of heritage places protected from loss	One aspect of managing our heritage is to protect important places from being lost. Listing places on an official heritage register is one way of helping this to happen. But it does not guarantee against loss.
Condition and integrity of places	This refers to the: <ul style="list-style-type: none"> • structural and physical soundness of a place; and • whether the place has been preserved in a way that is faithful to the original features of the place. Places in poor condition may become an ‘eyesore’ and a public safety hazard. Similarly, places that have been poorly restored and managed may not maintain their heritage character.
Age mix of places	This attribute is a measure of the proportion of listed places that come from different historical periods (i.e. the mix of place ages).
Public accessibility	This refers to whether or not the public is able to visit a historic place and get a hands-on experience at the place (e.g. photography, guided tours, workshops, open days, etc). Accessibility is more than just being able to view a place. It includes the opportunity to get a deeper appreciation of the place’s value and meaning.
Development controls	This attribute refers to the level of controls on development in and around heritage places (including buildings, gardens, monuments, etc). Some form of control is necessary to protect heritage places, but the level of control could vary depending on the heritage outcomes being sought.

The development controls attribute was included because the focus studies indicated that people were concerned about the type of planning mechanisms used to secure additional heritage protection. Some participants viewed tighter controls on development as a necessary step towards greater protection. Others viewed development controls as a ‘hidden cost’ to preserving heritage.

The selected attributes embody both use and non-use values associated with heritage. Use values stem from public accessibility (the opportunity to visit, photograph and learn), the visual appreciation of aesthetics (influenced by condition/integrity) and development controls — which may enhance or impinge on use value depending on an individual’s circumstance. Non-use values (existence, bequest and option values) stem from increased number of places protected, the diversity of sites protected from different historical periods and the condition/integrity of places (values associated with the knowledge that places are being maintained in good condition).

The focus groups expressed various opinions on how additional heritage protection should be funded. In most groups there was consensus that voluntary payments to a heritage fund could not be relied on as an effective mechanism for securing better heritage outcomes. For achieving increased levels of protection, some form of compulsory payment would have to be implemented or existing tax revenues would need to be reallocated. From a methodological perspective, CM requires respondents to know that higher levels of heritage protection (i.e. the change options) will require a payment from them. This is a basic tenet of economic value; respondents must have a willingness and ability to part with money in return for increased provision of a good. Simply asking people whether they would be willing to support a reallocation of existing tax revenues to heritage is not a valid measure of their value for additional heritage protection as people ignore the opportunity cost of the reallocation proposal (e.g. taking money out of hospitals or defence) and it induces ‘free riding behaviour’ (i.e. it induces people to rely on others to fund defence or hospitals).

The concept of a national heritage levy was tested in the focus group setting. Participants did not reject this proposal outright but some expressed concerns about whether the money raised would be wisely spent. Others were concerned about how the levy would be implemented equitably (e.g. would it be means tested?). The wording of the final questionnaire sought to overcome these concerns by asking people to focus on their personal willingness to fund additional heritage protection (through a levy) rather than the wider social implications of the levy and implementation matters.

B.3 Defining the attribute levels

The choice experiment presented respondents with a series of eight choice sets, each containing a ‘no change’ option (held constant across the eight choice sets) and two change options (which differed across the choice sets). For each choice set, respondents were asked to indicate their preferred option. The ‘change options’ were generated by varying the attribute levels over a plausible range. For this study, four levels were specified for each attribute within the selected range. The levels were defined as attribute outcomes that could plausibly eventuate by year 2020 under different forms of management. Table B.2 (next page) summarises the levels that were used for the study, together with the sources of information used to guide the selection of the levels.

Table B.2

ATTRIBUTE LEVELS

Attribute	Approximate current level	Future levels (as at 2020)		Data sources
		No change to current management	Range of levels under change options	
Additional number of places protected from loss	200,000 places currently listed on official registers ^a	5000	2000 5000 8000 10 000	Estimate of current listings and additional places protected by 2020 were made by The Allen Consulting Group in consultation with representatives of the Heritage Chairs and Officials of Australia and New Zealand.
Per cent of places in good condition and high integrity	20%	15%	15% 20% 40% 80%	Estimate of current condition is based on a survey reported in the 2001 <i>State of the Environment Report</i> (pp. 52-54). The survey relates to historic buildings. Estimates of future trends in condition/integrity were made by The Allen Consulting Group in consultation with representatives of the Heritage Chairs and Officials of Australia and New Zealand. Condition is forecast to trend downward under the 'no change' option due to a growing number of listed sites and limited funding to maintain them.
Age mix of listed places	80% over 100 years old and 20% more recent	Many over 100 years old, some (15%) more recent	All over 100 years old Almost all over 100 years old, few (5%) more recent Many over 100 years old, some (15%) more recent Half over 100 years old, half more recent	Estimate of current age mix based on the vintage of places listed on the Register of the National Estate and a review of Victorian and New South Wales official lists. Estimate of future age mix based on advice from representatives of the Heritage Chairs and Officials of Australia and New Zealand.

Attribute	Approximate current level	Future levels (as at 2020)		Data sources
		No change to current management	Range of levels under change options	
Per cent of places publicly accessible	10%	5%	5% 15% 20% 25%	Estimate of current accessibility is based on consultations with representatives of the Heritage Chairs and Officials of Australia and New Zealand. Per cent accessibility is forecast to trend downward under the 'no change' option due to a growing number of listed sites and limited funding to provide public access and facilities.
Development control	Substantial modifications permitted but no demolition	Demolition permitted subject to assessment	No modifications permitted Minor modifications permitted Substantial modifications permitted but no demolition Demolition permitted subject to assessment	The current system of development control varies across jurisdictions. However, according to representatives of the Heritage Chairs and Officials of Australia and New Zealand, most States allow substantial modifications to be made but have tight restrictions on demolition. In future, demolition approvals are expected to become more common as controls are relaxed.
Annual heritage levy	\$0	\$0	\$0 \$20 \$50 \$200	A range of payment levels was tested in a focus group setting. The adopted range (\$0 to \$200) was viewed as acceptable by focus group participants.

^a Listed sites are not guaranteed protection against loss.

Given that this choice experiment used six attributes and four levels per attribute, the total number of possible attribute/level combinations is 4096 (known as the ‘full factorial’). To present all combinations to respondents would be infeasible, so — in line with standard practice — a ‘fractional factorial’ experimental design was used to reduce the number of combinations, while maintaining the orthogonal property of the full factorial and maintaining a sufficient number of combinations to estimate the data relationships. An additional strategy known as ‘blocking’ was used to manage the large number of attribute/level combinations whereby the respondent sample was divided into eight segments or blocks, each of which were assigned a different version of the questionnaire (containing different choice set options).

B.4 Questionnaire design and administration

The CM questionnaire — reproduced in appendix C — was drafted and tested with input from a focus group held in Perth. The group provided feedback on whether the information presented was appropriate and whether the main issues and definitions were communicated effectively. The feedback also helped in understanding the process that participants used to answer choice sets.

Market research firm ACNielsen was engaged to administer the questionnaire as a web-based survey. The respondent sample was drawn from ACNielsen’s online panel ‘Your Voice’, which comprises 93 000 people. Panel members are recruited on the back of ACNielsen’s telephone and face-to-face omnibus surveys and through internet advertisements. Survey participants are rewarded for their participation through e-points, which are redeemable for gifts, movie passes, store vouchers or donations to charity. The number of e-points awarded is determined by the length of survey.

The sample for this study was structured to contain participants with demographic characteristics in the same proportion as the national population (as determined by the Australian Bureau of Statistics *Census*). A total of 2024 completed questionnaires were obtained from the survey, representing a response rate of 79 per cent.

B.5 Analysing the choice modelling results

Preliminary examination of the data

The survey provided a rich source of information about respondent choices and preferences for different heritage outcomes. As each of the 2024 respondents answered eight choice questions, the survey produced 16 192 individual choice observations. Of these observations, a large proportion (77 per cent) of choices involved the selection of one of the ‘change’ options, each of which included a levy payment. Only 23 per cent of choices involved the maintenance of the status quo in which no levy was imposed.

Most respondents selected a change option for at least one the choice questions presented to them. Only 5 per cent of respondents (104 in total) selected the ‘no change to current management’ option consistently across all eight choice sets. Table B.3 provides a breakdown of the reasons given by respondents for consistently selecting the no change option. The data indicates that:

- Approximately 50 per cent of respondents in this group have low or zero values for additional heritage protection.
- The other half appear to be either protesting about the payment vehicle (a levy) or are confused about the choice task. That is:
 - around 43 per cent of these respondents may value heritage, but distrust the concept of a heritage trust fund. These respondents could be viewed as protesting against the payment vehicle presented in the questionnaire; and
 - 6 per cent of these respondents may be confused with respect to the choice task. Confusion may partly be a result of individuals having poorly formed preferences for heritage outcomes.

Table B.3

REASONS FOR CONSISTENT SELECTION OF THE 'NO CHANGE' OPTION

Reason for selecting 'no change'	% of 'no change' respondent sub-set	Interpretation of reason given
I believe that historic heritage is already well managed.	37	Zero value for additional heritage protection.
I support more protection but can't afford to contribute to the cost.	16	Zero value for additional heritage protection.
I oppose the idea of a heritage levy.	34	Protest zero.
I am prepared to pay for additional heritage outcomes but distrust that my payment into a fund will be wisely spent.	7	Protest zero.
I didn't know which option was best so I stuck with the 'no change' option.	6	Confusion and possibly poorly formed preferences.

This information is useful because it allows us to differentiate between those respondents with genuine zero values and those that have consistently chosen a no-levy option, but may in fact have a non-zero value.

A vocal minority who opposed the concept of increased taxation, took the opportunity provided by a free-form unprompted opportunity to express their concerns about increased tax support for historic heritage conservation (see box B.1, next page).

Box B.1

CONCERNS ABOUT INCREASED GOVERNMENT SUPPORT FOR HERITAGE PLACES

- 'There needed to be an other selection for most of these questions as I did not agree with making more taxes to pay to keep heritage sites in their prime. I would prefer that these sites are sub managed by a volunteer local committee type programme.'
- 'I feel that we are taxed enough. If heritage listed places are open for tourists, there is increased work for the locals, plus - the admission charges would help raise the revenue for ongoing upgrades required. Which I feel all-around is better for the community.'
- 'We are already overtaxed. ... Govt's just need to get their acts together.'
- 'I feel that while Australians should contribute to the preservation of historic heritage the first and preferred option should always be that the developer pays for the privilege of modifying or at worst destroying our heritage!'
- 'It should be the responsibility of the different levels of government to ensure that heritage that can be well maintained to a good usable condition similar to what it was like when it was first built. However the funds for this restoration and maintenance should not come out of a special levy that the Australian taxpayer has to pay. But this should not stop people from donating money to the funding of these projects if they so desire. The main reason is that the government should be looking to more effectively manage the money received from taxes.'

Statistical analysis of the data

The heritage options chosen by respondents in the choice experiment are assumed to be underpinned by a theory known as Random Utility Theory. The utility obtained by individual i from choosing alternative j in a choice set is given by:

$$V_{ij} = (q_j, c_j, s_i, \varepsilon_{ij})$$

where q_i is a vector of non-monetary heritage attributes, c_j is the cost of the option (specified by the levy), s_j is a vector of the individual's socioeconomic characteristics, and ε_{ij} is an error term. An error term is included to reflect the fact that the researcher does not know all the factors that contribute to an individual's utility.

The probability of individual i choosing alternative j is given by:

$$\Pr_{ij} = \Pr\{v_{ij}(q_j, c_j, s_i) + \varepsilon_{ij} \geq \{v_{ik}(q_k, c_k, s_i) + \varepsilon_{ik}\} \quad \forall j \neq k$$

This equation says that the probability of a respondent choosing alternative j is equal to the probability that the utility associated with that alternative exceeds the utility associated with any other alternative k in the choice set. The random utility model is made operational by adopting a particular cumulative density function for the unobserved component of utility, ε . If the ε 's are independently and identically distributed with a extreme value type I (Weibull) distribution, then the individual's probability of choosing site j is given by a multinomial logit (MNL) model⁶⁸:

⁶⁸ Originally formulated by D. McFadden 1974, 'The measurement of urban travel demand', *Journal of Public Economics*, vol. 3, pp. 303-328.

$$\text{Pr}_j = \frac{\exp(v_j)}{\sum_{k=1}^J \exp(v_k)}$$

Parameters of the utility function are estimated by Maximum Likelihood which finds values for the coefficients that maximise the likelihood of the pattern of choices in sample being observed. In this study, the software package LIMDEP was used to estimate the MNL model.

Three different specifications of the MNL model were examined:

- Model 1 — This model included all attributes and individual characteristics, and was estimated using the full set of choice observations for 2024 respondents.
- Model 2 — This was the same specification as Model 1, but was estimated using a reduced sample which excluded the 14 per cent of respondents for which income data was not available and those that registered a ‘protest bid’ or a zero bid due to confusion. This reduced the sample by 290 respondents. For the initial modeling runs these observations were retained in the estimating sample by assigning the sample average income level to these respondents.
- Model 3 — This is reduced form of the first two models. The model was formulated by removing individual characteristics that were not statistically significant. *This model is the preferred specification for calculating attribute values and willingness to pay for alternative heritage outcomes.*

For all three models, attributes were entered into the utility functions in a linear form. Non-linear specifications have not been examined in this report.⁶⁹ The coefficient estimates for each model are presented in table B.4.

⁶⁹ A non-linear relationship between utility and attribute levels would mean that individuals have a diminishing marginal value for increasing levels of attribute provision.

Table B.4

MULTINOMIAL LOGIT MODEL COEFFICIENT ESTIMATES

Variable	Model 1	Model 2	Model 3
Places protected	0.0000 ***	0.0000 ***	0.0000 ***
Condition of places	0.0098 ***	0.0097 ***	0.0097 ***
Age mix of places	-0.0013 **	-0.0015 **	-0.0015 **
Accessibility of places	0.0260 ***	0.0258 ***	0.0258 ***
Development control levels	-0.1567	-0.1530	-0.1531
- No modifications	0.2186 ***	0.2103 ***	0.2102 ***
- Minimal modifications	0.0929 ***	0.1129 ***	0.1130 ***
- Substantial modifications	-0.0070 ***	-0.0072 ***	-0.0072 ***
Levy	0.0000 ***	0.0000 ***	0.0000 ***
ASC (change options)	0.2253 *	0.1469	0.1764 *
Individual characteristics			
Gender	-0.2883 ***	-0.3811 ***	-0.3788 ***
Pro heritage	0.4956 ***	0.5667 ***	0.5694 ***
Heritage house	0.4414 ***	0.5670 ***	0.5750 ***
Age	0.0013	-0.0001	
Education	-0.0386 ***	-0.0244 **	-0.0234 **
Income	0.0000	0.0001 **	0.0001 **
Citizen	-0.0162	0.0668	
Metropolitan resident	-0.0709 *	-0.0392	
<i>Number of observations</i>	16,192	13,872	13,872
<i>Log likelihood ratio</i>	0.1045	0.1125	0.1125

Note: ***Significant at 1 per cent; **Significant at 5 per cent; *Significant at 10 per cent.

The alternative specific constant (ASC) is coded 1 for options 2 and 3 (the change options) and 0 for option 1. The ASC takes up any systematic variation in utility between the choices that cannot be explained by either the attributes or individual characteristics.

Age and income levels are specified as midpoints of the categories provided in the questionnaire.

Education levels are specified as the categorical levels 1 through to 9 with 1 being most advanced (post graduate) and 9 being least advanced (primary school only).

Gender = 1 if male, 0 if female.

Pro heritage = 1 if any affiliation or involvement with heritage; 0 otherwise.

Heritage house = 1 if respondent owns a heritage-listed property, 0 otherwise.

Citizen = 1 if Australian citizen, 0 otherwise.

Metropolitan resident = 1 if residing in a metropolitan city area, 0 otherwise

Calculation of implicit prices

The MNL model coefficients can be used to estimate the rate at which respondents are willing to trade off one attribute for another. For instance, a person's willingness to trade off reductions in the proportion of heritage places in good condition in return for a unit increase in the proportion of places publicly accessible

can be estimated by dividing the coefficients of the *Condition* attribute by the *Accessibility* attribute and multiplying through by minus one.

Such estimates may be useful in helping to determine the amount of non-monetary compensation required to restore community well-being if, say, development reduces the value of a particular heritage place or places.

Where the attribute being 'sacrificed' is the *Cost* attribute, the trade off estimated is known as an implicit price. Implicit prices demonstrate the amount of money respondents are willing to pay to secure an increase in one or more of the non-market heritage attributes. The formula for calculating the implicit price (IP) of a heritage attribute is:

$$IP = -1(\beta_{\text{heritage attribute}} / \beta_{\text{cost attribute}})$$

where the betas (β 's) are coefficients of the attributes.

A different procedure is used to calculate IPs for qualitative attributes such as Development Control. For these attributes, IPs are calculated by taking the difference between the coefficients of two of the levels (for example *Substantial Modifications* and *Minor Modifications*) and dividing through by the negative of the cost attribute coefficient.

The IP's calculated using Model 3 coefficients are reported in chapter 4, together with an example of how these value estimates can be used to calculate household willingness to pay for different heritage protection scenarios.

Appendix C

The survey instrument

The survey questionnaire is reproduced on the following pages. It should be read with the following qualifications:

- the actual survey was undertaken online, and so the format of the questionnaire was substantially different to that shown here (e.g. with colouring, navigation buttons and progress indicators); and
- the choice sets (i.e. questions 3 to 10) were varied for each respondent in line with the experimental design adopted; and
- question 11 was only visible to those respondents who have answered 'no change' for each of the choice sets.

A survey of community preferences for protecting historic heritage

Thank you for participating in this survey about Australia's historic heritage.

This survey is funded by government heritage agencies that are responsible for the management of heritage places in each state and territory.

Your participation in this survey will help the heritage agencies gain a better understanding of community preferences for different heritage protection options around Australia.

There are no right or wrong answers — just indicate what outcome is most preferable to you.

All your answers will be treated confidentially, and will be kept separate from information that might be used to identify you, such as your name or address.

What is this questionnaire about?

To begin, we'd like to explain what is meant by historic heritage.

Historic heritage is what we choose to inherit from the past. This survey covers Australia's heritage since European settlement. While Indigenous and natural (environmental) heritage are also important, we do not deal with these types of heritage in this survey. Separate studies are examining these issues.

For the purposes of this survey, historic heritage places can include:

- Buildings, e.g. houses, shops and churches;
- pioneering huts, farms and shearing sheds;
- Aboriginal missions;
- designed gardens and parks;
- old mines, factories and other industrial sites;
- railways, roads, bridges and ports;
- ruins;
- places that show how people lived and worked;
- shipwrecks; and
- monuments and memorials dedicated to important historic people and events; and
- historic streets, suburbs and towns.

We have identified five heritage attributes to help you evaluate your preferences for a number of different options.

Please read this information carefully. You will need it to answer the following questions.

Heritage Attributes	Description
Number of heritage places protected from loss	One aspect of managing our heritage is to protect important places from being lost. Listing places on an official heritage register is one way of helping this to happen. But it does not guarantee against loss.
Condition and integrity of places	<p>This refers to the:</p> <ul style="list-style-type: none"> • structural and physical soundness of a place; and • whether the place has been preserved in a way that is faithful to the original features of the place. <p>Places in poor condition may become an ‘eyesore’ and a public safety hazard. Similarly, places that have been poorly restored and managed may not maintain their heritage character.</p>
Age mix of places	This attribute is a measure of the proportion of listed places that come from different historical periods — that is, the mix of place ages.
Public accessibility	This refers to whether or not the public is able to visit a historic place and get a hands-on experience at the place — for example, photography, guided tours, workshops, open days etc. Accessibility is more than just being able to view a place. It includes the opportunity to get a deeper appreciation of the place’s value and meaning.
Development control	This attribute refers to the level of controls on development in and around heritage places – including buildings, gardens, monuments etc. Some form of control is necessary to protect heritage places, but the level of control could vary depending on the heritage outcomes being sought.

Heritage Protection Options

The 'no change' option

One option for heritage protection is to continue with the same level of funding and same types of management programs. Currently, the State/Territory and Commonwealth governments spend around \$10 per person on heritage protection.

Heritage experts estimate that the current level of spending and programs will lead to the following *20-year outcomes*:

Places protected from loss:

An additional 5000 places will be protected from loss across Australia over the next 20 years through a combination of heritage programs in each State and Territory.

Condition and integrity of places:

At present, about 20% of all places listed on official registers are in good condition and high integrity. Over the next 20 years, this proportion is expected to fall to 15% of places due to funding limitations.

Age mix of places:

At present, about 80% of listed places are more than 100 years old. Over the next 20 years, this proportion is expected to increase slightly to 85% as places progressively get older.

Public accessibility:

At present, about 10% of listed places are accessible as most places are private residences or commercial office properties. Over the next 20 years, this proportion is expected to fall to 5% of places due to funding limitations.

Development control:

Under the current system, substantial modifications are permitted to heritage places, although approval for demolition is rare. Over the next 20 years, demolition approvals may become more common as it is becoming more difficult to control development.

Question 1. Overall, based on these outcomes, do you think enough is being done across Australia to protect historic heritage?

- No, too little is being done.
- Yes, about right.
- Too much is being done.
- Don't know.

Question 2. Historic heritage protection is funded by all levels of government. If more funds were to become available, where do you think the additional money should be spent? *Please tick one box only.*

- Places of significance to the nation.
- Places of significance to your State or Territory.
- Places of significance to your local area.
- Don't know.

Alternative management options

For some people, the 'no change' option may not be their preferred outcome.

One way of doing more for heritage would be to establish a levy specifically for protecting Australia's historic heritage. The levy could be introduced through the tax system or collected as part of local council rates. The proceeds of this levy could be managed through a heritage trust fund. The details of this proposal would need to be worked out and there may be better ways of raising funds. Instead of focussing on these funding mechanisms, we would like you to consider what could be achieved with additional funding and how you value these changes.

With additional funding, there would be scope to do more for heritage at the local, state/territory and national levels.

- More places could be protected from loss.
- Improvements could be made to the condition and integrity of heritage places
- The age-mix of places could be changed
- Places could be made more accessible to the public.

The purpose of this survey is to find out your preferences for these outcomes.

We are going to show you two alternative options at a time, each with a different package of 20-year outcomes. Your task is to pick the option that suits you best. This task will be repeated *eight times*. Please treat each question independently.

Some of the options require you to make an annual payment through a levy payable as part of your tax return. While this is a hypothetical exercise, we would like you to treat the questions **seriously and answer honestly** as if considering a real payment.

Question 3. Please consider the three heritage protection options below. A package of 20-year outcomes are shown for each option.

	No change to current management option	Alternative option 1	Alternative option 2
Additional number of places protected from loss	5000	8000	2000
Condition and integrity of places (% of listed places in good condition and high integrity)	15%	20%	40%
Age mix of places	Many over 100 years old, some more recent	Many over 100 years old, some more recent	All over 100 years old
Public accessibility (% of listed places accessible)	5%	25%	20%
Development control	Demolition permitted subject to assessment	Substantial modifications permitted but no demolition	Minor modifications permitted
Your levy payment each year	\$0	\$200	\$200

I would prefer: *Tick one box only*

- Alternative Option 1
- Alternative Option 2
- No change option

Question 4. Please consider the three heritage protection options below. A package of 20-year outcomes are shown for each option.

	No change to current management option	Alternative option 1	Alternative option 2
Additional number of places protected from loss	5000	2000	10,000
Condition and integrity of places (% of listed places in good condition and high integrity)	15%	80%	15%
Age mix of places	Many over 100 years old, some more recent	All over 100 years old	Half over 100 years old, half more recent
Public accessibility (% of listed places accessible)	5%	15%	20%
Development control	Demolition permitted subject to assessment	No modifications permitted	Demolition permitted subject to assessment
Your levy payment each year	\$0	\$20	\$50

I would prefer: *Tick one box only*

- Alternative option 1
- Alternative option 2
- No change option

Question 5. Please consider the three heritage protection options below. A package of 20-year outcomes are shown for each option.

	No change to current management option	Alternative option 1	Alternative option 2
Additional number of places protected from loss	5000	2000	2000
Condition and integrity of places (% of listed places in good condition and high integrity)	15%	80%	20%
Age mix of places	Many over 100 years old, some more recent	All over 100 years old	Almost all over 100 years old, few more recent
Public accessibility (% of listed places accessible)	5%	15%	5%
Development control	Demolition permitted subject to assessment	No modifications permitted	Demolition permitted subject to assessment
Your levy payment each year	\$0	\$20	\$200

I would prefer: *Tick one box only*

- Alternative option 1
- Alternative option 2
- No change option

Question 6. Please consider the three heritage protection options below. A package of 20-year outcomes are shown for each option.

	No change to current management option	Alternative option 1	Alternative option 2
Additional number of places protected from loss	5000	10,000	2000
Condition and integrity of places (% of listed places in good condition and high integrity)	15%	15%	80%
Age mix of places	Many over 100 years old, some more recent	Half over 100 years old, half more recent	All over 100 years old
Public accessibility (% of listed places accessible)	5%	20%	15%
Development control	Demolition permitted subject to assessment	Demolition permitted subject to assessment	No modifications permitted
Your levy payment each year	\$0	\$50	\$20

I would prefer: *Tick one box only*

- Alternative option 1
- Alternative option 2
- No change option

Question 7. Please consider the three heritage protection options below. A package of 20-year outcomes are shown for each option.

	No change to current management option	Alternative option 1	Alternative option 2
Additional number of places protected from loss	5000	5000	2000
Condition and integrity of places (% of listed places in good condition and high integrity)	15%	40%	40%
Age mix of places	Many over 100 years old, some more recent	Almost all over 100 years old, few more recent	All over 100 years old
Public accessibility (% of listed places accessible)	5%	5%	20%
Development control	Demolition permitted subject to assessment	Minor modifications permitted	Minor modifications permitted
Your levy payment each year	\$0	\$0	\$200

I would prefer: *Tick one box only*

- Alternative option 1
- Alternative option 2
- No change option

Question 8. Please consider the three heritage protection options below. A package of 20-year outcomes are shown for each option.

	No change to current management option	Alternative option 1	Alternative option 2
Additional number of places protected from loss	5000	10,000	8000
Condition and integrity of places (% of listed places in good condition and high integrity)	15%	15%	40%
Age mix of places	Many over 100 years old, some more recent	Half over 100 years old, half more recent	Almost all over 100 years old, few more recent
Public accessibility (% of listed places accessible)	5%	20%	20%
Development control	Demolition permitted subject to assessment	Demolition permitted subject to assessment	Substantial modifications permitted but no demolition
Your levy payment each year	\$0	\$50	\$50

I would prefer: *Tick one box only*

- Alternative option 1
- Alternative option 2
- No change option

Question 9. Please consider the three heritage protection options below. A package of 20-year outcomes are shown for each option.

	No change to current management option	Alternative option 1	Alternative option 2
Additional number of places protected from loss	5000	5000	2000
Condition and integrity of places (% of listed places in good condition and high integrity)	15%	40%	20%
Age mix of places	Many over 100 years old, some more recent	Almost all over 100 years old, few more recent	Half over 100 years old, half more recent
Public accessibility (% of listed places accessible)	5%	5%	25%
Development control	Demolition permitted subject to assessment	Minor modifications permitted	Minor modifications permitted
Your levy payment each year	\$0	\$0	\$50

I would prefer: *Tick one box only*

- Alternative option 1
- Alternative option 2
- No change option

Question 10. Please consider the three heritage protection options below. A package of 20-year outcomes are shown for each option.

	No change to current management option	Alternative option 1	Alternative option 2
Additional number of places protected from loss	5000	8000	5000
Condition and integrity of places (% of listed places in good condition and high integrity)	15%	20%	15%
Age mix of places	Many over 100 years old, some more recent	Many over 100 years old, some more recent	All over 100 years old
Public accessibility (% of listed places accessible)	5%	25%	15%
Development control	Demolition permitted subject to assessment	Substantial modifications permitted but no demolition	Substantial modifications permitted but no demolition
Your levy payment each year	\$0	\$200	\$50

I would prefer: *Tick one box only*

- Alternative option 1
- Alternative option 2
- No change option

[Only for those who have answered 'no change' for each of the choice sets:]

Question 11. In the previous eight questions you selected the 'no change' option for every question. Which statement below most closely describes your reason for making this choice Did you choose the 'no change' option for ALL questions?

- I believe that historic heritage is already well managed
- I support more protection but can't afford to contribute to the cost
- I oppose the idea of a heritage levy
- I am prepared to pay for additional heritage outcomes but distrust that my payment into a fund will be wisely spent.
- I didn't know which option was best so I stuck with the 'no change' option.

Question 12. To what extent do you agree or disagree with the following statements about heritage?

	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
It is important to educate children about heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is important to keep historic features wherever possible when trying to improve towns and cities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Built heritage can mean small and modest places as well as grand historic buildings and churches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The historic buildings in my local area are worth saving and are important parts of heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The historic houses in my local area are an important part of the area's character and identity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Celebrating heritage is important	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heritage can mean recent as well as old buildings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Looking after our heritage is important in creating jobs and boosting the economy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heritage plays an important part in Australia's culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We protect too much heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is possible to keep heritage places and provide for the needs of today	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My life is richer for having the opportunity to visit or see heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't know what heritage activities are taking place in my area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There's never any information on the heritage topics of interest to me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Australia's heritage is not relevant to me or my family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heritage is a part of Australia's identity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is important to protect heritage places even though I may never visit them	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Question 13. If more money was to be spent on heritage issues, which of the following would you choose to spend it on?

Please rank in order of importance from 1-10 where 1 is the most important item and 10 is the least important item. Please put a number in every box and do not give two or more items the same ranking.

- | | |
|--|--------------------------|
| Education about heritage | <input type="checkbox"/> |
| Re-using historic buildings | <input type="checkbox"/> |
| Protecting non-built heritage (e.g. cemeteries, shipwrecks, old mines) | <input type="checkbox"/> |
| Improved public access to historic buildings and places | <input type="checkbox"/> |
| Better information on how people can look after their heritage | <input type="checkbox"/> |
| Exploring the heritage of different cultures in the local area | <input type="checkbox"/> |
| Looking after historic heritage | <input type="checkbox"/> |
| Improved protection and recognition of more recent heritage (post 1950) | <input type="checkbox"/> |
| Buying out or compensating owners of properties who lose development opportunities as a result of heritage listing | <input type="checkbox"/> |
| Other (please specify)_____ | <input type="checkbox"/> |
| _____ | <input type="checkbox"/> |

A Few Questions About You...

To finish, we would like to ask you some questions about yourself to ensure that we are surveying a wide range of people.

Please note that the information collected here will only be used for statistical analysis and will not be passed on to any third parties or used in any other way.

Question 14. What is your gender?

- male
- female

Question 15. Please indicate whether any of the following applies to you. *Tick the relevant box(es).*

- Member of a historic society or club?
- Past or present member of a local council?
- Volunteered your time for heritage activities?
- Donated to heritage causes in the last 12 months?
- Own or live in a heritage-listed property?
- None of the above apply to me

Question 16. Which age do bracket to you belong to?

- 18-24
- 25-29
- 30-34
- 35-39
- 40-44
- 45-49
- 50-54
- 55-59
- 60-64
- 65-69
- 70+

Question 17. What is the highest level of formal education qualification you have completed?

- Post Graduate
- Graduate Diploma or Graduate Certificate
- Bachelor Degree
- Advanced Diploma or Diploma
- Certificate
- Year 12 or equivalent
- Year 11 or equivalent
- Year 7 to Year 10
- Primary School
- Other *Please specify* _____

Question 18. Please indicate your gross income (before tax, including pensions and allowances) that you receive each week from all sources

- Less than \$120 per week (up to \$5,759 per year)
- \$120 to \$299 per week (\$5,760 to \$14,352 per year)
- \$300 to \$499 per week (\$14,353 to \$23,952 per year)
- \$500 to \$699 per week (\$23,953 to \$33,552 per year)
- \$700 to \$999 per week (\$33,553 to \$47,952 per year)
- \$1,000 to \$1,499 per week (\$47,953 to \$71,952 per year)
- \$1,500 to \$1,999 per week (\$71,953 to \$95,952 per year)
- \$2,000 or more per week (over \$95,953 per year)
- I prefer not to answer

Question 19. What is your postcode? _____

Question 20. Are you an Australian citizen?

- Yes
- No

Those are all the questions we have for you today. Before you finish, we would like to ask for any feedback or suggestions you have on our online survey. Any comments are appreciated and will help us to improve our future surveys.

End of questions. Thanks for your participation

*Appendix D***Further national results from the survey**

Table D.1

OVERALL, BASED ON THESE OUTCOMES, DO YOU THINK ENOUGH IS BEING DONE ACROSS AUSTRALIA?

	Percentage of respondents
No, too little is being done	61.9
Yes, about right	32.2
Too much is being done	3.4
Don't know	2.5
Total	100

Table D.2

HISTORIC HERITAGE PROTECTION IS FUNDED BY ALL LEVELS OF GOVERNMENT. IF MORE FUNDS WERE TO BECOME AVAILABLE, WHERE DO YOU THINK THE ADDITIONAL MONEY SHOULD BE SPENT?

	Percentage of respondents
Places of significance to the nation	61.0
Places of significance to your State or Territory	19.3
Places of significance to your local area	17.2
Don't know	2.5
Total	100

Table D.3

PROPORTION OF RESPONDENTS WHO ANSWERED: TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT HERITAGE? (PER CENT)

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
It is important to educate children about heritage	60.2	36.7	2.8	0.2	0.1
It is important to keep historic features wherever possible when trying to improve towns and cities	53.5	41.2	4.2	1.0	0.1
Built heritage can mean small and modest places as well as grand historic buildings and churches	50.9	41.9	5.3	1.8	0.1
The historic buildings in my local area are worth saving and are important parts of heritage	40.0	44.1	12.5	2.9	0.5
The historic houses in my local area are an important part of the area's character and identity	39.7	40.5	14.5	4.3	0.9
Celebrating heritage is important	36.7	44.8	16.3	1.8	0.5
Heritage can mean recent as well as old buildings	19.8	43.6	22.1	12.9	1.5
Looking after our heritage is important in creating jobs and boosting the economy	16.6	39.5	32.9	9.3	1.7
Heritage plays an important part in Australia's culture	40.9	46.2	9.4	3.1	0.4
We protect too much heritage	2.2	6.8	21.7	45.1	24.3
It is possible to keep heritage places and provide for the needs of today	25.6	61.1	10.1	2.9	0.3
My life is richer for having the opportunity to visit or see heritage	34.8	43.9	16.8	3.7	0.9
I don't know what heritage activities are taking place in my area	5.9	33.8	29.3	27.5	3.5
There's never any information on the heritage topics of interest to me	3.2	18.0	39.0	35.1	4.7
Australia's heritage is not relevant to me or my family	1.5	3.5	14.0	46.3	34.6
Heritage is a part of Australia's identity	48.2	44.1	5.3	1.6	0.7
It is important to protect heritage places even though I may never visit them	46.1	47.3	5.0	1.2	0.3

Table D.4

PROPORTION OF RESPONDENTS WHO RANKED THE FOLLOWING ISSUES FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (PER CENT)

	1	2	3	4	5	6	7	8	9	10
Education about heritage	22.2	14.0	13.9	12.0	12.8	8.1	7.1	4.1	3.8	2.0
Re-using historic buildings	11.5	14.6	12.8	11.8	11.4	10.7	9.0	9.3	6.3	2.5
Protecting non-built heritage (e.g. cemeteries, shipwrecks, old mines)	8.9	16.9	18.4	13.0	11.8	10.2	8.2	5.8	4.8	2.0
Improved public access to historic buildings and places	11.0	11.9	14.9	16.7	11.8	10.6	8.8	7.9	4.9	1.5
Better information on how people can look after their heritage	3.0	8.4	9.9	13.6	15.8	15.4	14.4	11.8	6.2	1.6
Exploring the heritage of different cultures in the local area	3.3	5.8	7.9	7.9	11.5	16.1	15.8	15.2	13.4	3.1
Looking after historic heritage	22.5	13.0	9.6	11.1	10.4	8.9	11.6	6.4	3.8	2.6
Improved protection and recognition or more recent heritage (post 1950)	2.2	7.1	6.1	6.5	6.9	10.1	13.1	23.4	20.1	4.5
Buying out or compensating owners of properties who lose development opportunities as a result of heritage listing	9.4	6.9	5.2	5.4	6.1	7.1	8.8	11.8	30.5	8.7

Appendix E

State and Territory results

The following sections provide State and Territory summary results for a number of the survey questions. The information is provided without commentary so that each jurisdiction can draw any jurisdiction-specific observations

Caution needs to be exercised in interpreting the results for Tasmania, the Australian Capital Territory (ACT) and the Northern Territory (NT) as sampling errors are relatively high due to the small sample sizes involved.⁷⁰

E.1 New South Wales

Table E.1

PROPORTION OF RESPONDENTS WHO ANSWERED: DO YOU THINK ENOUGH IS BEING DONE ACROSS AUSTRALIA TO PROTECT HISTORIC HERITAGE? (PER CENT)

	No, too little is being done	Yes, about right	Too much is being done	Don't know	Total
NSW Metro	57.9	36.7	3.3	2.1	100
NSW Regional	58.9	36.3	3.0	1.7	100
NSW	58.3	36.6	3.2	2.0	100

Table E.2

PROPORTION OF RESPONDENTS WHO ANSWERED: HISTORIC HERITAGE PROTECTION IS FUNDED BY ALL LEVELS OF GOVERNMENT. IF MORE FUNDS WERE TO BECOME AVAILABLE, WHERE DO YOU THINK THE ADDITIONAL MONEY SHOULD BE SPENT? (PER CENT)

	Places of significance to the nation	Places of significance to your State or Territory	Places of significance to your local area	Don't know	Total
NSW Metro	60.6	16.3	20.1	3.0	100
NSW Regional	68.5	5.7	24.0	1.8	100
Total NSW	63.5	12.5	21.5	2.5	100

⁷⁰ It is important to note, however, that these three jurisdictions were intentionally over-sampled in a national context (i.e. relative to the demographic mix of the nation, as identified by the Australian Bureau of Statistics).

Table E.3

PROPORTION OF RESPONDENTS WHO ANSWERED: TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT HERITAGE?

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
It is important to educate children about heritage						
NSW Metro	56%	41%	3%	1%	0%	100%
NSW Regional	62%	35%	3%	0%	0%	100%
Total NSW	58%	38%	3%	0%	0%	100%
It is important to keep historic features wherever possible when trying to improve towns and cities						
NSW Metro	49%	45%	5%	1%	0%	100%
NSW Regional	56%	38%	6%	0%	0%	100%
Total NSW	52%	42%	5%	1%	0%	100%
Built heritage can mean small and modest places as well as grand historic buildings and churches						
NSW Metro	49%	43%	6%	2%	0%	100%
NSW Regional	53%	40%	5%	1%	1%	100%
Total NSW	50%	42%	5%	2%	0%	100%
The historic buildings in my local area are worth saving and are important parts of heritage						
NSW Metro	38%	46%	12%	3%	1%	100%
NSW Regional	42%	44%	10%	3%	0%	100%
Total NSW	39%	45%	12%	3%	0%	100%

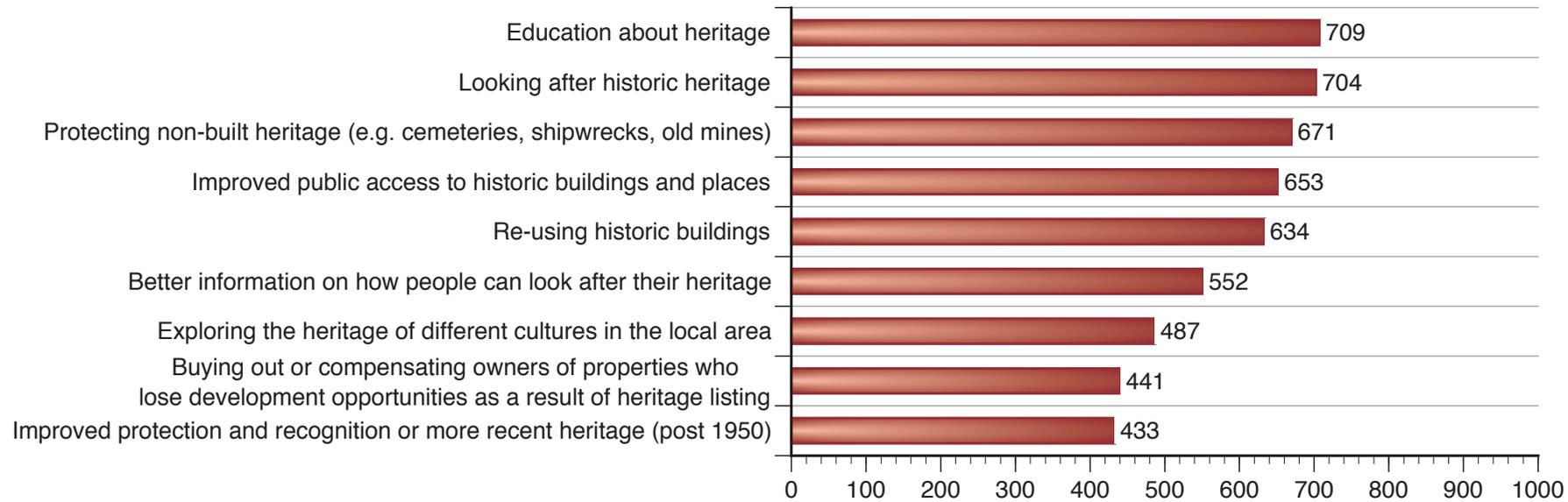
	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
The historic houses in my local area are an important part of the area's character and identity						
NSW Metro	39%	43%	12%	5%	1%	100%
NSW Regional	40%	44%	12%	3%	0%	100%
Total NSW	40%	44%	12%	4%	1%	100%
Celebrating heritage is important						
NSW Metro	37%	42%	17%	2%	1%	100%
NSW Regional	37%	46%	16%	2%	0%	100%
Total NSW	37%	44%	17%	2%	1%	100%
Heritage can mean recent as well as old buildings						
NSW Metro	21%	45%	20%	12%	1%	100%
NSW Regional	18%	43%	21%	17%	1%	100%
Total NSW	20%	44%	20%	14%	1%	100%
Looking after our heritage is important in creating jobs and boosting the economy						
NSW Metro	14%	36%	37%	11%	2%	100%
NSW Regional	18%	38%	36%	6%	1%	100%
Total NSW	16%	37%	37%	9%	2%	100%

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
Heritage plays an important part in Australia's culture						
NSW Metro	41%	43%	13%	3%	0%	100%
NSW Regional	40%	49%	7%	3%	0%	100%
Total NSW	40%	45%	11%	3%	0%	100%
We protect too much heritage						
NSW Metro	1%	7%	25%	44%	23%	100%
NSW Regional	3%	7%	23%	44%	23%	100%
Total NSW	2%	7%	25%	44%	23%	100%
It is possible to keep heritage places and provide for the needs of today						
NSW Metro	25%	56%	14%	4%	1%	100%
NSW Regional	27%	63%	9%	1%	0%	100%
Total NSW	26%	58%	12%	3%	1%	100%
My life is richer for having the opportunity to visit or see heritage						
NSW Metro	33%	44%	18%	4%	1%	100%
NSW Regional	35%	45%	17%	3%	0%	100%
Total NSW	34%	44%	18%	4%	1%	100%

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
I don't know what heritage activities are taking place in my area						
NSW Metro	9%	39%	28%	23%	2%	100%
NSW Regional	3%	29%	30%	33%	5%	100%
Total NSW	7%	35%	28%	26%	3%	100%
Australia's heritage is not relevant to me or my family						
NSW Metro	1%	6%	17%	47%	29%	100%
NSW Regional	1%	3%	11%	49%	35%	100%
Total NSW	1%	5%	15%	48%	31%	100%
Heritage is a part of Australia's identity						
NSW Metro	46%	42%	9%	2%	1%	100%
NSW Regional	52%	46%	1%	1%	0%	100%
Total NSW	48%	44%	6%	2%	0%	100%
It is important to protect heritage places even though I may never visit them						
NSW Metro	46%	47%	7%	1%	0%	100%
NSW Regional	53%	40%	6%	2%	0%	100%
Total NSW	48%	44%	6%	1%	0%	100%

Figure E.1

NSW'S OVERALL RANKING FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (UNITS)



Note: The maximum number of units for a category is 1000, which is equivalent to 100 per cent of respondents ranking the category as their first priority. The lower bound may vary because of the opportunity provided to respondents to nominate an optional category. In practice, the lower bound is close to 100 units.

Table E.4

PROPORTION OF RESPONDENTS WHO RANKED THE FOLLOWING ISSUES FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (PER CENT)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Education about heritage											
NSW Metro	22.6	12.8	13.3	11.5	11.4	11.5	5.9	3.6	5.4	1.9	100
NSW Regional	25.9	15.7	12.0	12.8	10.3	6.1	5.0	2.9	7.0	2.4	100
NSW	23.8	13.8	12.8	12.0	11.0	9.5	5.6	3.4	6.0	2.1	100
Re-using historic buildings											
NSW Metro	11.2	14.1	11.3	12.4	13.6	12.4	9.6	7.6	5.8	2.2	100
NSW Regional	12.9	15.7	9.2	11.4	13.7	9.7	9.5	6.8	9.5	1.5	100
NSW	11.8	14.7	10.5	12.0	13.6	11.4	9.6	7.3	7.2	1.9	100
Protecting non-built heritage (e.g. cemeteries, shipwrecks, old mines)											
NSW Metro	9.1	15.8	16.8	11.0	17.6	9.3	8.5	6.7	4.8	0.4	100
NSW Regional	7.9	21.6	22.7	12.3	7.9	10.6	5.7	5.0	2.8	3.5	100
NSW	8.6	17.9	19.0	11.5	14.0	9.8	7.5	6.1	4.0	1.6	100
Improved public access to historic buildings and places											
NSW Metro	11.8	12.6	16.3	16.4	11.2	9.9	8.9	9.0	3.6	0.4	100
NSW Regional	11.0	10.2	14.1	19.1	13.3	7.4	6.0	11.1	6.1	1.8	100
NSW	11.5	11.7	15.5	17.4	11.9	9.0	7.8	9.8	4.5	0.9	100

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Better information on how people can look after their heritage											
NSW Metro	2.5	9.1	9.8	14.9	14.9	15.2	12.5	12.7	6.0	2.3	100
NSW Regional	2.7	6.1	9.1	10.8	17.0	21.1	12.7	13.1	5.9	1.5	100
NSW	2.6	8.0	9.6	13.4	15.7	17.3	12.6	12.8	6.0	2.0	100
Exploring the heritage of different cultures in the local area											
NSW Metro	2.3	6.3	8.4	7.3	8.4	16.1	20.0	15.2	13.6	2.3	100
NSW Regional	2.6	4.7	9.0	8.4	14.8	13.8	18.1	10.6	13.7	4.3	100
NSW	2.4	5.7	8.6	7.7	10.7	15.2	19.3	13.5	13.7	3.1	100
Looking after historic heritage											
NSW Metro	24.4	16.1	12.4	11.3	9.5	8.0	8.9	5.8	1.8	1.8	100
NSW Regional	23.4	9.0	12.1	11.4	8.4	11.6	10.9	5.9	4.3	3.1	100
NSW	24.0	13.5	12.3	11.4	9.1	9.3	9.6	5.8	2.7	2.3	100
Improved protection and recognition or more recent heritage (post 1950)											
NSW Metro	2.1	6.4	5.9	7.0	6.9	7.5	14.2	23.3	22.2	4.5	100
NSW Regional	2.2	6.5	3.9	6.1	10.0	9.8	15.7	23.9	17.4	4.5	100
NSW	2.2	6.5	5.2	6.7	8.0	8.3	14.7	23.5	20.4	4.5	100
Buying out or compensating owners of properties who lose development opportunities as a result of heritage listing											
NSW Metro	8.5	6.5	4.4	6.2	4.4	7.8	8.2	12.9	31.2	10.0	100
NSW Regional	7.0	9.2	5.4	6.8	4.3	7.9	13.0	12.4	27.8	6.3	100
NSW	7.9	7.5	4.8	6.4	4.4	7.8	9.9	12.7	30.0	8.6	100

E.2 Victoria

Table E.5

PROPORTION OF RESPONDENTS WHO ANSWERED: DO YOU THINK ENOUGH IS BEING DONE ACROSS AUSTRALIA TO PROTECT HISTORIC HERITAGE? (PER CENT)

	No, too little is being done	Yes, about right	Too much is being done	Don't know	Total
VIC. Metro	64.7	29.2	3.2	2.8	100
VIC. Regional	67.2	26.7	2.5	3.6	100
Total VIC.	65.4	28.6	3.0	3.0	100

Table E.6

PROPORTION OF RESPONDENTS WHO ANSWERED: HISTORIC HERITAGE PROTECTION IS FUNDED BY ALL LEVELS OF GOVERNMENT. IF MORE FUNDS WERE TO BECOME AVAILABLE, WHERE DO YOU THINK THE ADDITIONAL MONEY SHOULD BE SPENT? (PER CENT)

	Places of significance to the nation	Places of significance to your State or Territory	Places of significance to your local area	Don't know	Total
VIC. Metro	62.8	21.5	13.1	2.6	100
VIC. Regional	61.1	17.1	19.5	2.4	100
Total VIC.	62.3	20.3	14.8	2.5	100

Table E.7

PROPORTION OF RESPONDENTS WHO ANSWERED: TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT HERITAGE?

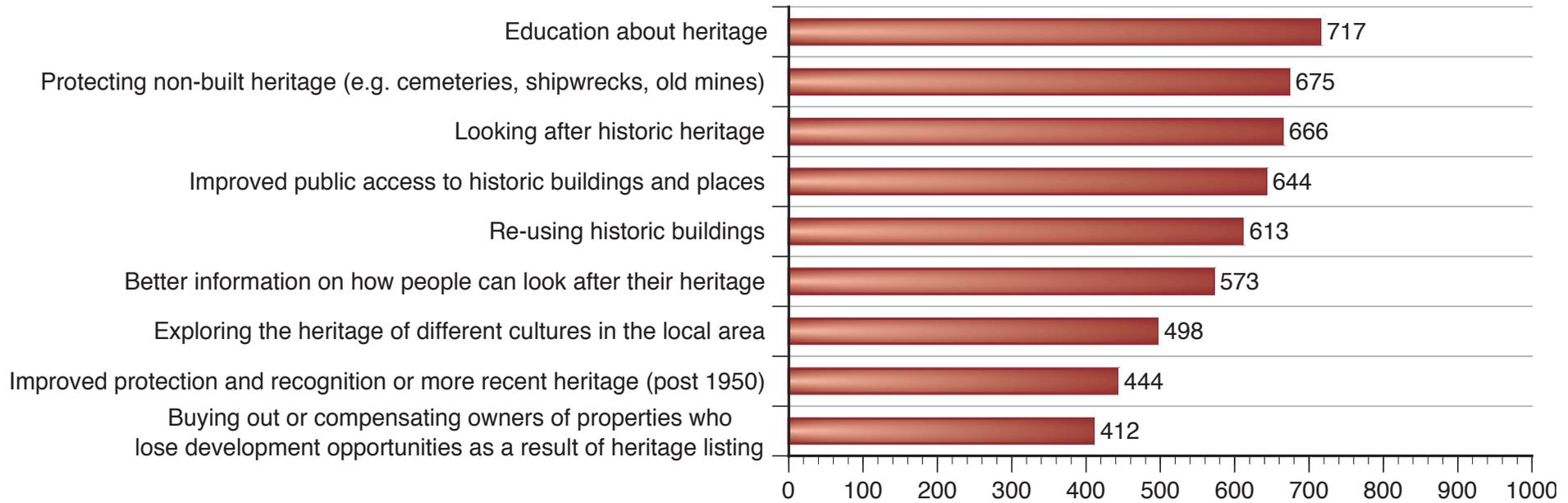
	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
It is important to educate children about heritage						
VIC. Metro	60	36	4	0	0	100
VIC. Regional	67	28	5	0	0	100
Total VIC.	62	34	4	0	0	100
It is important to keep historic features wherever possible when trying to improve towns and cities						
VIC. Metro	52	45	3	1	0	100
VIC. Regional	61	34	3	2	0	100
Total VIC.	54	42	3	1	0	100
Built heritage can mean small and modest places as well as grand historic buildings and churches						
VIC. Metro	47	47	5	1	0	100
VIC. Regional	61	31	6	3	0	100
Total VIC.	51	43	5	2	0	100
The historic buildings in my local area are worth saving and are important parts of heritage						
VIC. Metro	34	47	15	3	1	100
VIC. Regional	55	36	6	3	1	100
Total VIC.	40	44	12	3	1	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
The historic houses in my local area are an important part of the area's character and identity						
VIC. Metro	38	41	16	5	1	100
VIC. Regional	50	33	13	2	2	100
Total VIC.	41	39	15	4	1	100
Celebrating heritage is important						
VIC. Metro	36	44	18	2	0	100
VIC. Regional	37	47	13	2	0	100
Total VIC.	36	45	17	2	0	100
Heritage can mean recent as well as old buildings						
VIC. Metro	20	44	22	13	1	100
VIC. Regional	23	41	18	15	3	100
Total VIC.	21	43	21	14	1	100
Looking after our heritage is important in creating jobs and boosting the economy						
VIC. Metro	16	41	30	11	2	100
VIC. Regional	26	37	31	5	1	100
Total VIC.	19	40	30	9	2	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
Heritage plays an important part in Australia's culture						
VIC. Metro	42	46	8	3	1	100
VIC. Regional	50	40	4	7	0	100
Total VIC.	44	44	7	4	1	100
We protect too much heritage						
VIC. Metro	2	7	21	45	26	100
VIC. Regional	5	6	17	41	31	100
Total VIC.	3	7	20	44	27	100
It is possible to keep heritage places and provide for the needs of today						
VIC. Metro	25	64	8	3	0	100
VIC. Regional	32	52	13	3	0	100
Total VIC.	27	60	9	3	0	100
My life is richer for having the opportunity to visit or see heritage						
VIC. Metro	34	46	16	4	1	100
VIC. Regional	48	33	14	4	1	100
Total VIC.	38	43	15	4	1	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
I don't know what heritage activities are taking place in my area						
VIC. Metro	6	37	32	23	2	100
VIC. Regional	4	29	28	30	8	100
Total VIC.	6	35	31	25	4	100
Australia's heritage is not relevant to me or my family						
VIC. Metro	2	5	13	45	36	100
VIC. Regional	0	2	15	36	47	100
Total VIC.	1	4	13	42	39	100
Heritage is a part of Australia's identity						
VIC. Metro	47	47	5	1	1	100
VIC. Regional	62	30	5	2	1	100
Total VIC.	51	42	5	2	1	100
It is important to protect heritage places even though I may never visit them						
VIC. Metro	46	47	5	2	0	100
VIC. Regional	47	46	6	2	0	100
Total VIC.	46	47	5	2	0	100

Figure E.2
VICTORIA'S OVERALL FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (UNITS)



Note: The maximum number of units for a category is 1000, which is equivalent to 100 per cent of respondents ranking the category as their first priority. The lower bound may vary because of the opportunity provided to respondents to nominate an optional category. In practice, the lower bound is close to 100 units.

Table E.8

PROPORTION OF RESPONDENTS WHO RANKED THE FOLLOWING ISSUES FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (PER CENT)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Education about heritage											
VIC. Metro	22.1	14.0	13.7	11.0	15.3	8.1	6.8	3.7	2.0	3.3	100
VIC. Regional	26.6	15.3	14.3	8.7	10.9	7.2	6.6	3.7	4.6	2.0	100
Total VIC.	23.3	14.4	13.9	10.4	14.1	7.9	6.7	3.7	2.7	2.9	100
Re-using historic buildings											
VIC. Metro	8.7	12.4	16.5	13.2	9.5	9.2	9.1	11.3	8.1	1.8	100
VIC. Regional	7.6	13.4	14.5	17.6	6.3	7.7	8.8	15.0	3.6	5.4	100
Total VIC.	8.4	12.7	16.0	14.4	8.7	8.8	9.1	12.3	6.9	2.8	100
Protecting non-built heritage (e.g. cemeteries, shipwrecks, old mines)											
VIC. Metro	9.7	19.5	18.4	14.1	9.1	9.2	8.6	4.6	4.2	2.5	100
VIC. Regional	11.8	12.6	20.5	14.9	8.9	8.1	8.8	8.9	3.0	2.5	100
Total VIC.	10.3	17.7	18.9	14.3	9.0	8.9	8.7	5.8	3.9	2.5	100
Improved public access to historic buildings and places											
VIC. Metro	12.1	12.8	12.9	18.2	12.3	8.5	7.1	9.9	4.5	1.7	100
VIC. Regional	10.5	12.3	11.9	12.0	9.1	12.4	19.5	7.7	3.9	0.7	100
Total VIC.	11.7	12.6	12.6	16.5	11.4	9.6	10.5	9.3	4.3	1.4	100

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Better information on how people can look after their heritage											
VIC. Metro	3.5	7.1	12.4	14.1	16.5	13.6	14.1	13.1	4.1	1.6	100
VIC. Regional	3.0	10.7	8.4	15.8	18.8	13.5	16.6	6.0	7.2	0.0	100
Total VIC.	3.4	8.1	11.3	14.5	17.1	13.6	14.7	11.2	4.9	1.2	100
Exploring the heritage of different cultures in the local area											
VIC. Metro	5.0	4.3	7.0	7.3	12.6	16.8	16.0	13.8	14.0	3.2	100
VIC. Regional	4.0	10.7	5.7	4.5	15.2	20.1	11.0	12.8	10.0	6.0	100
Total VIC.	4.7	6.0	6.6	6.5	13.3	17.7	14.7	13.5	12.9	3.9	100
Looking after historic heritage											
VIC. Metro	20.6	14.4	8.5	9.8	10.4	11.5	14.1	4.2	4.6	1.8	100
VIC. Regional	18.4	12.0	10.8	9.2	13.1	12.7	6.8	6.5	6.1	4.3	100
Total VIC.	20.0	13.7	9.1	9.7	11.1	11.8	12.1	4.8	5.0	2.5	100
Improved protection and recognition or more recent heritage (post 1950)											
VIC. Metro	3.1	7.1	6.3	7.4	5.6	10.6	11.8	26.0	17.6	4.5	100
VIC. Regional	3.9	4.9	6.2	5.9	7.6	10.2	9.4	22.4	24.0	5.5	100
Total VIC.	3.3	6.5	6.3	7.0	6.1	10.5	11.1	25.0	19.3	4.8	100
Buying out or compensating owners of properties who lose development opportunities as a result of heritage listing											
VIC. Metro	6.9	5.9	3.6	3.4	6.2	8.4	10.9	9.6	34.6	10.4	100
VIC. Regional	6.6	4.7	5.7	7.8	9.6	3.4	11.1	7.7	33.0	10.4	100
Total VIC.	6.8	5.6	4.2	4.6	7.1	7.1	10.9	9.1	34.2	10.4	100

E.3 Queensland

Table E.9

PROPORTION OF RESPONDENTS WHO ANSWERED: DO YOU THINK ENOUGH IS BEING DONE ACROSS AUSTRALIA TO PROTECT HISTORIC HERITAGE? (PER CENT)

	No, too little is being done	Yes, about right	Too much is being done	Don't know	Total
QLD. Metro	64.5	29.1	2.5	3.9	100
QLD. Regional	63.6	33.4	1.1	2.0	100
Total QLD.	64.0	31.4	1.7	2.9	100

Table E.10

PROPORTION OF RESPONDENTS WHO ANSWERED: HISTORIC HERITAGE PROTECTION IS FUNDED BY ALL LEVELS OF GOVERNMENT. IF MORE FUNDS WERE TO BECOME AVAILABLE, WHERE DO YOU THINK THE ADDITIONAL MONEY SHOULD BE SPENT? (PER CENT)

	Places of significance to the nation	Places of significance to your State or Territory	Places of significance to your local area	Don't know	Total
QLD. Metro	61.9	19.1	15.5	3.6	100
QLD. Regional	70.4	11.3	18.3	0.0	100
Total QLD.	66.5	14.9	17.0	1.7	100

Table E.11

PROPORTION OF RESPONDENTS WHO ANSWERED: TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT HERITAGE?

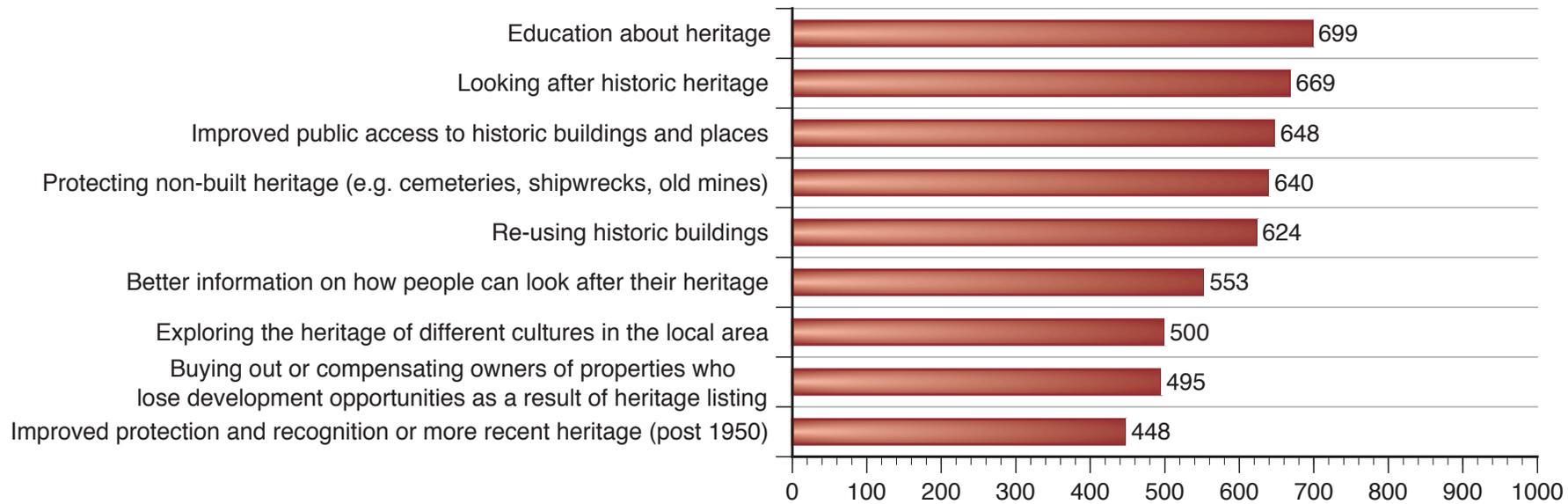
	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
It is important to educate children about heritage						
QLD. Metro	63	35	2	0	0	100
QLD. Regional	64	35	2	0	0	100
Total QLD.	63	35	2	0	0	100
It is important to keep historic features wherever possible when trying to improve towns and cities						
QLD. Metro	58	37	4	1	1	100
QLD. Regional	56	41	3	1	0	100
Total QLD.	57	39	3	1	0	100
Built heritage can mean small and modest places as well as grand historic buildings and churches						
QLD. Metro	54	40	5	1	0	100
QLD. Regional	50	45	3	1	0	100
Total QLD.	52	43	4	1	0	100
The historic buildings in my local area are worth saving and are important parts of heritage						
QLD. Metro	36	44	18	3	0	100
QLD. Regional	47	43	10	1	0	100
Total QLD.	42	43	13	2	0	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
The historic houses in my local area are an important part of the area's character and identity						
QLD. Metro	35	43	18	4	0	100
QLD. Regional	42	36	17	5	0	100
Total QLD.	39	39	18	5	0	100
Celebrating heritage is important						
QLD. Metro	39	46	13	2	0	100
QLD. Regional	40	46	15	0	0	100
Total QLD.	39	46	14	1	0	100
Heritage can mean recent as well as old buildings						
QLD. Metro	21	47	21	10	0	100
QLD. Regional	17	37	31	14	2	100
Total QLD.	19	42	26	12	1	100
Looking after our heritage is important in creating jobs and boosting the economy						
QLD. Metro	18	38	34	8	2	100
QLD. Regional	17	46	28	10	0	100
Total QLD.	17	42	31	9	1	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
Heritage plays an important part in Australia's culture						
QLD. Metro	41	49	7	3	0	100
QLD. Regional	38	47	14	1	0	100
Total QLD.	40	48	10	2	0	100
We protect too much heritage						
QLD. Metro	2	6	15	51	26	100
QLD. Regional	1	7	18	50	24	100
Total QLD.	1	6	17	50	25	100
It is possible to keep heritage places and provide for the needs of today						
QLD. Metro	27	62	8	3	0	100
QLD. Regional	21	70	3	5	0	100
Total QLD.	24	67	6	4	0	100
My life is richer for having the opportunity to visit or see heritage						
QLD. Metro	37	44	13	6	1	100
QLD. Regional	42	36	22	1	0	100
Total QLD.	39	39	18	3	0	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
I don't know what heritage activities are taking place in my area						
QLD. Metro	8	37	25	26	5	100
QLD. Regional	1	25	37	34	3	100
Total QLD.	4	31	32	30	4	100
Australia's heritage is not relevant to me or my family						
QLD. Metro	4	2	12	46	36	100
QLD. Regional	0	1	14	48	37	100
Total QLD.	2	1	13	47	37	100
Heritage is a part of Australia's identity						
QLD. Metro	50	42	4	3	1	100
QLD. Regional	47	47	6	0	1	100
Total QLD.	48	45	5	1	1	100
It is important to protect heritage places even though I may never visit them						
QLD. Metro	47	46	5	1	0	100
QLD. Regional	46	52	2	0	1	100
Total QLD.	46	49	4	1	0	100

Figure E.3
QUEENSLAND'S OVERALL FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (UNITS)



Note: The maximum number of units for a category is 1000, which is equivalent to 100 per cent of respondents ranking the category as their first priority. The lower bound may vary because of the opportunity provided to respondents to nominate an optional category. In practice, the lower bound is close to 100 units.

Table E.12
PROPORTION OF RESPONDENTS WHO RANKED THE FOLLOWING ISSUES FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (PER CENT)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Education about heritage											
QLD. Metro	24.4	11.8	11.6	12.5	15.4	5.9	8.9	4.2	3.0	2.3	100
QLD. Regional	17.0	9.0	19.9	12.2	14.2	11.0	7.3	6.7	1.8	0.8	100
Total QLD.	20.4	10.3	16.1	12.3	14.8	8.7	8.1	5.5	2.4	1.5	100
Re-using historic buildings											
QLD. Metro	13.6	15.9	11.4	12.4	8.5	11.5	9.8	9.0	5.1	2.8	100
QLD. Regional	14.8	14.1	7.4	7.9	9.4	12.4	11.3	13.0	4.2	5.6	100
Total QLD.	14.2	14.9	9.2	10.0	9.0	12.0	10.6	11.1	4.6	4.3	100
Protecting non-built heritage (e.g. cemeteries, shipwrecks, old mines)											
QLD. Metro	10.2	16.7	18.2	12.0	14.0	10.7	6.3	6.8	3.4	1.7	100
QLD. Regional	4.8	11.4	17.8	12.4	15.5	12.9	10.3	5.6	6.9	2.3	100
Total QLD.	7.3	13.8	18.0	12.3	14.8	11.9	8.5	6.1	5.3	2.0	100
Improved public access to historic buildings and places											
QLD. Metro	9.2	10.9	16.3	16.9	11.3	9.8	9.2	7.6	6.9	2.0	100
QLD. Regional	10.8	14.0	17.0	13.8	13.6	14.5	5.5	2.6	4.1	4.0	100
Total QLD.	10.0	12.6	16.7	15.2	12.6	12.3	7.2	4.9	5.4	3.1	100

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Better information on how people can look after their heritage											
QLD. Metro	1.2	9.4	9.6	15.0	13.2	12.0	14.7	13.8	10.1	0.9	100
QLD. Regional	4.6	10.4	8.4	13.8	13.1	12.6	17.6	9.9	9.6	0.0	100
Total QLD.	3.1	10.0	9.0	14.3	13.2	12.3	16.3	11.7	9.8	0.4	100
Exploring the heritage of different cultures in the local area											
QLD. Metro	2.6	4.9	7.2	9.7	12.7	17.9	16.1	14.0	11.8	3.2	100
QLD. Regional	3.4	7.6	8.8	9.3	10.5	13.3	13.4	19.1	13.5	1.2	100
Total QLD.	3.0	6.3	8.0	9.5	11.5	15.4	14.6	16.7	12.7	2.1	100
Looking after historic heritage											
QLD. Metro	21.8	15.6	9.6	9.2	10.8	7.2	12.7	5.8	3.8	3.5	100
QLD. Regional	24.1	11.1	3.6	12.6	13.1	7.3	10.7	11.1	3.1	3.2	100
Total QLD.	23.0	13.2	6.4	11.1	12.1	7.3	11.6	8.7	3.4	3.3	100
Improved protection and recognition or more recent heritage (post 1950)											
QLD. Metro	0.9	6.9	7.9	5.1	5.7	13.9	11.8	25.9	18.2	3.7	100
QLD. Regional	0.8	11.5	10.0	6.2	5.1	7.5	12.6	17.9	21.2	7.3	100
Total QLD.	0.8	9.4	9.0	5.7	5.4	10.4	12.2	21.6	19.8	5.6	100
Buying out or compensating owners of properties who lose development opportunities as a result of heritage listing											
QLD. Metro	11.0	6.5	7.4	6.0	7.0	7.7	6.1	10.5	32.3	5.6	100
QLD. Regional	14.0	9.5	6.6	7.4	5.5	6.2	4.5	13.5	26.9	6.0	100
Total QLD.	12.6	8.1	6.9	6.7	6.2	6.9	5.2	12.1	29.4	5.8	100

E.4 Western Australia

Table E.13

PROPORTION OF RESPONDENTS WHO ANSWERED: DO YOU THINK ENOUGH IS BEING DONE ACROSS AUSTRALIA TO PROTECT HISTORIC HERITAGE? (PER CENT)

	No, too little is being done	Yes, about right	Too much is being done	Don't know	Total
WA Metro	56.1	34.6	6.8	2.5	100
WA Regional	60.5	26.5	13.0	0.0	100
Total WA	57.2	32.5	8.4	1.9	100

Table E.14

PROPORTION OF RESPONDENTS WHO ANSWERED: HISTORIC HERITAGE PROTECTION IS FUNDED BY ALL LEVELS OF GOVERNMENT. IF MORE FUNDS WERE TO BECOME AVAILABLE, WHERE DO YOU THINK THE ADDITIONAL MONEY SHOULD BE SPENT? (PER CENT)

	Places of significance to the nation	Places of significance to your State or Territory	Places of significance to your local area	Don't know	Total
WA Metro	52.3	34.6	9.6	3.4	100
WA Regional	39.3	27.4	33.3	0.0	100
Total WA	49.0	32.8	15.7	2.5	100

Table E.15

PROPORTION OF RESPONDENTS WHO ANSWERED: TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT HERITAGE?

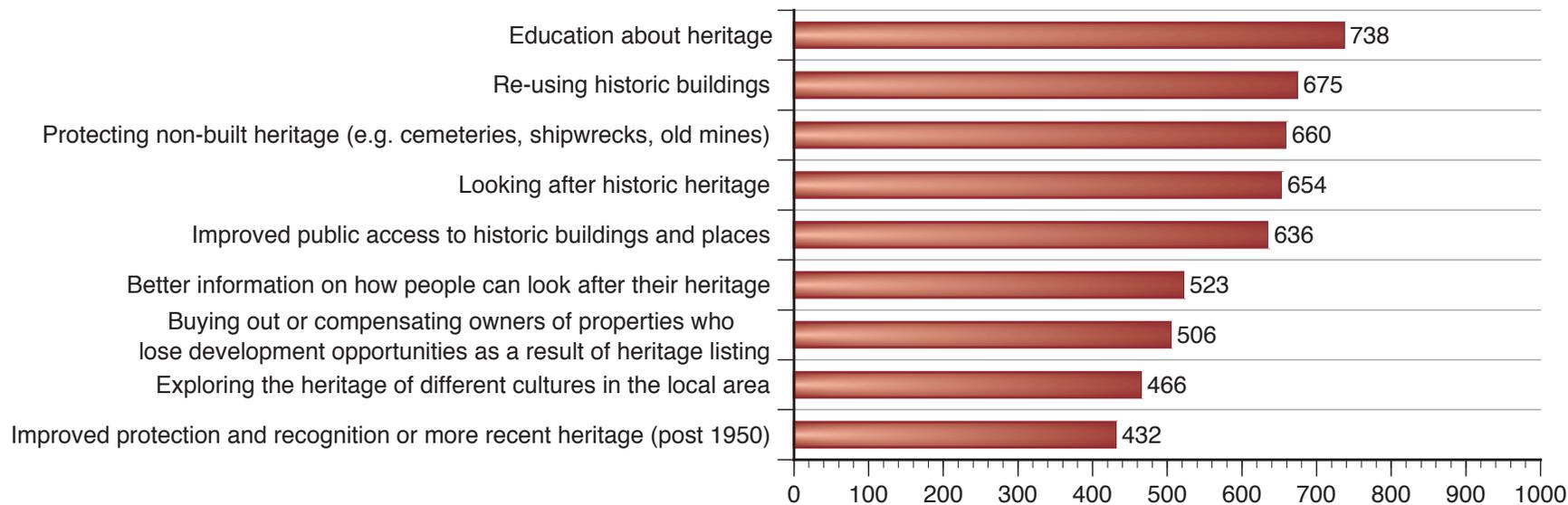
	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
It is important to educate children about heritage						
WA Metro	53	45	2	0	1	100
WA Regional	76	24	0	0	0	100
Total WA	58	39	2	0	0	100
It is important to keep historic features wherever possible when trying to improve towns and cities						
WA Metro	49	42	7	2	1	100
WA Regional	55	38	5	2	0	100
Total WA	50	41	6	2	0	100
Built heritage can mean small and modest places as well as grand historic buildings and churches						
WA Metro	45	42	8	4	1	100
WA Regional	62	31	4	2	0	100
Total WA	49	39	7	4	0	100
The historic buildings in my local area are worth saving and are important parts of heritage						
WA Metro	32	39	21	5	3	100
WA Regional	41	45	8	6	0	100
Total WA	34	40	18	5	3	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
The historic houses in my local area are an important part of the area's character and identity						
WA Metro	32	32	24	7	5	100
WA Regional	41	49	4	4	2	100
Total WA	34	36	19	6	4	100
Celebrating heritage is important						
WA Metro	38	42	16	2	2	100
WA Regional	42	42	12	4	0	100
Total WA	39	42	15	2	1	100
Heritage can mean recent as well as old buildings						
WA Metro	20	41	20	15	4	100
WA Regional	16	51	19	10	4	100
Total WA	19	43	20	14	4	100
Looking after our heritage is important in creating jobs and boosting the economy						
WA Metro	13	40	31	11	4	100
WA Regional	14	50	25	12	0	100
Total WA	13	43	30	11	3	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
Heritage plays an important part in Australia's culture						
WA Metro	37	48	9	5	1	100
WA Regional	45	43	8	4	0	100
Total WA	39	46	9	5	1	100
We protect too much heritage						
WA Metro	5	10	22	44	18	100
WA Regional	2	14	25	43	17	100
Total WA	4	11	23	44	18	100
It is possible to keep heritage places and provide for the needs of today						
WA Metro	26	61	12	1	0	100
WA Regional	18	77	4	2	0	100
Total WA	24	65	10	1	0	100
My life is richer for having the opportunity to visit or see heritage						
WA Metro	31	43	20	5	1	100
WA Regional	39	46	11	4	0	100
Total WA	33	44	17	5	1	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
I don't know what heritage activities are taking place in my area						
WA Metro	8	37	26	25	4	100
WA Regional	0	34	25	31	9	100
Total WA	6	36	26	26	5	100
Australia's heritage is not relevant to me or my family						
WA Metro	2	3	18	44	32	100
WA Regional	0	4	9	37	49	100
Total WA	2	4	16	42	37	100
Heritage is a part of Australia's identity						
WA Metro	46	46	6	2	1	100
WA Regional	52	40	2	4	3	100
Total WA	47	44	5	2	1	100
It is important to protect heritage places even though I may never visit them						
WA Metro	40	52	4	1	2	100
WA Regional	41	57	0	2	0	100
Total WA	41	53	3	1	1	100

Figure E.4
WESTERN AUSTRALIA'S OVERALL FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (UNITS)



Note: The maximum number of units for a category is 1000, which is equivalent to 100 per cent of respondents ranking the category as their first priority. The lower bound may vary because of the opportunity provided to respondents to nominate an optional category. In practice, the lower bound is close to 100 units

Table E.16

PROPORTION OF RESPONDENTS WHO RANKED THE FOLLOWING ISSUES FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (PER CENT)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Education about heritage											
WA Metro	20.7	18.8	11.8	14.7	11.5	6.0	9.2	3.5	2.6	1.1	100
WA Regional	15.6	27.5	21.2	13.6	9.0	4.1	5.2	1.6	2.1	0.0	100
Total WA	19.4	21.0	14.2	14.4	10.8	5.5	8.2	3.0	2.5	0.8	100
	20.7	18.8	11.8	14.7	11.5	6.0	9.2	3.5	2.6	1.1	
Re-using historic buildings											
WA Metro	9.6	21.4	15.2	10.9	12.3	11.6	6.3	5.5	5.6	1.6	100
WA Regional	18.4	9.2	19.8	13.3	11.0	7.1	6.1	10.8	2.2	2.2	100
Total WA	11.8	18.3	16.4	11.5	11.9	10.5	6.3	6.9	4.8	1.7	100
Protecting non-built heritage (e.g. cemeteries, shipwrecks, old mines)											
WA Metro	11.0	16.6	15.0	16.7	8.0	13.4	5.5	4.0	6.1	3.8	100
WA Regional	8.1	19.9	15.9	9.3	12.6	13.8	7.1	7.4	5.9	0.0	100
Total WA	10.3	17.4	15.2	14.8	9.2	13.5	5.9	4.9	6.0	2.8	100
Improved public access to historic buildings and places											
WA Metro	8.5	12.1	16.3	15.5	12.9	9.5	10.7	6.5	6.6	1.4	100
WA Regional	3.1	12.3	11.4	25.0	16.5	15.5	12.3	0.0	3.9	0.0	100
Total WA	7.1	12.2	15.1	17.9	13.8	11.0	11.1	4.8	5.9	1.1	100

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Better information on how people can look after their heritage											
WA Metro	2.8	6.7	6.8	9.0	15.2	16.7	17.8	13.1	7.8	4.0	100
WA Regional	2.1	5.2	11.0	19.3	13.6	17.3	11.0	16.6	1.9	1.9	100
Total WA	2.6	6.3	7.9	11.6	14.8	16.8	16.1	14.0	6.3	3.5	100
Exploring the heritage of different cultures in the local area											
WA Metro	3.2	3.5	10.0	5.4	10.5	17.1	14.3	15.3	18.9	1.8	100
WA Regional	0.0	1.6	3.9	12.3	13.8	16.3	10.4	28.6	10.0	3.1	100
Total WA	2.4	3.0	8.5	7.2	11.4	16.9	13.3	18.8	16.6	2.1	100
Looking after historic heritage											
WA Metro	21.0	6.3	11.0	15.0	7.7	7.4	16.3	6.1	6.1	3.1	100
WA Regional	28.8	15.2	7.8	4.1	6.7	2.1	24.2	6.8	0.0	4.3	100
Total WA	23.0	8.6	10.2	12.2	7.4	6.1	18.3	6.3	4.5	3.4	100
Improved protection and recognition or more recent heritage (post 1950)											
WA Metro	2.2	6.7	6.3	7.3	8.8	8.6	10.5	25.9	20.2	3.5	100
WA Regional	1.6	7.0	0.0	1.6	7.2	17.6	15.2	20.3	28.0	1.6	100
Total WA	2.0	6.7	4.7	5.8	8.4	10.9	11.7	24.4	22.2	3.0	100
Buying out or compensating owners of properties who lose development opportunities as a result of heritage listing											
WA Metro	15.7	5.2	7.0	2.0	10.4	7.7	6.5	16.6	20.9	8.0	100
WA Regional	22.3	2.1	8.9	1.6	9.4	4.3	8.5	5.8	32.0	5.1	100
Total WA	17.4	4.4	7.5	1.9	10.1	6.8	7.0	13.8	23.7	7.2	100

E.5 South Australia

Table E.17

PROPORTION OF RESPONDENTS WHO ANSWERED: DO YOU THINK ENOUGH IS BEING DONE ACROSS AUSTRALIA TO PROTECT HISTORIC HERITAGE? (PER CENT)

	No, too little is being done	Yes, about right	Too much is being done	Don't know	Total
SA Metro	64.2	29.5	3.7	2.6	100
SA Regional	63.6	30.1	0.0	6.4	100
Total SA	64.0	29.7	2.8	3.6	100

Table E.18

PROPORTION OF RESPONDENTS WHO ANSWERED: HISTORIC HERITAGE PROTECTION IS FUNDED BY ALL LEVELS OF GOVERNMENT. IF MORE FUNDS WERE TO BECOME AVAILABLE, WHERE DO YOU THINK THE ADDITIONAL MONEY SHOULD BE SPENT? (PER CENT)

	Places of significance to the nation	Places of significance to your State or Territory	Places of significance to your local area	Don't know	Total
SA Metro	48.1	37.3	9.0	5.6	100
SA Regional	57.6	21.9	18.2	2.2	100
Total SA	50.5	33.5	11.3	4.7	100

Table E.19

PROPORTION OF RESPONDENTS WHO ANSWERED: TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT HERITAGE?

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
It is important to educate children about heritage						
SA Metro	54	43	4	0	0	100
SA Regional	65	35	0	0	0	100
Total SA	57	41	3	0	0	100
It is important to keep historic features wherever possible when trying to improve towns and cities						
SA Metro	48	45	6	1	0	100
SA Regional	47	50	2	0	0	100
Total SA	48	47	5	1	0	100
Built heritage can mean small and modest places as well as grand historic buildings and churches						
SA Metro	52	40	7	1	0	100
SA Regional	45	44	10	0	0	100
Total SA	50	41	8	1	0	100
The historic buildings in my local area are worth saving and are important parts of heritage						
SA Metro	39	48	11	2	1	100
SA Regional	48	49	2	0	0	100
Total SA	42	48	9	1	0	100

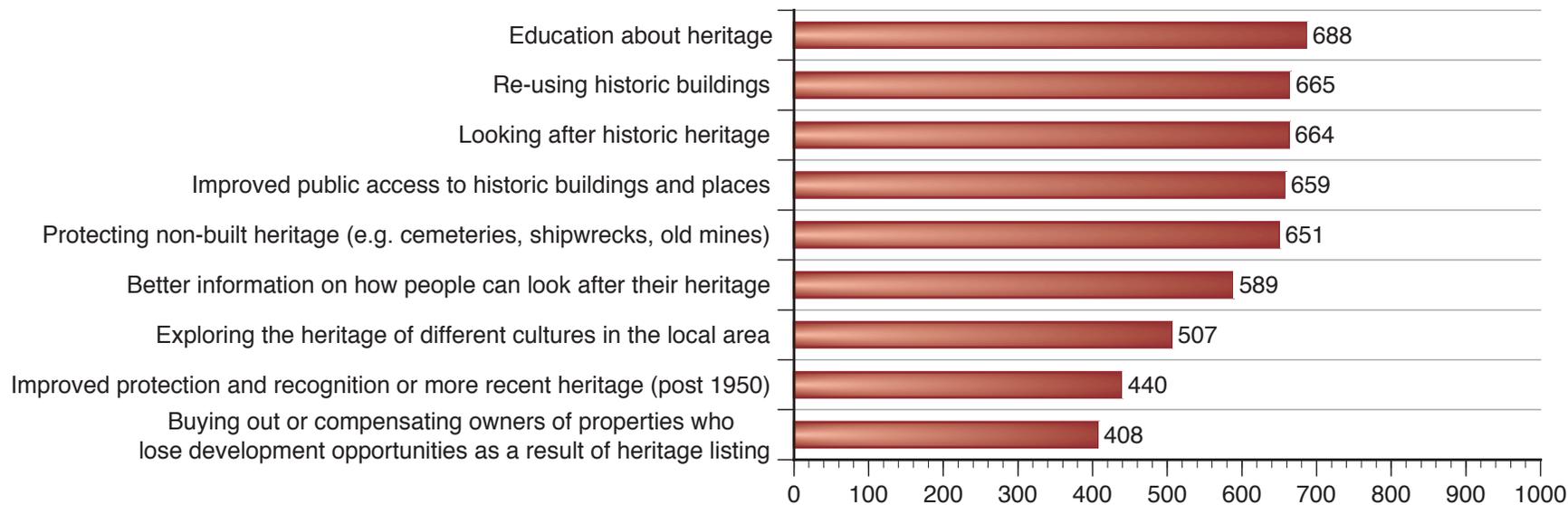
	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
The historic houses in my local area are an important part of the area's character and identity						
SA Metro	37	43	16	3	2	100
SA Regional	44	52	4	0	0	100
Total SA	39	45	13	2	1	100
Celebrating heritage is important						
SA Metro	23	53	21	2	1	100
SA Regional	44	33	20	2	0	100
Total SA	28	48	21	2	1	100
Heritage can mean recent as well as old buildings						
SA Metro	18	51	24	7	1	100
SA Regional	18	28	38	14	0	100
Total SA	18	46	27	9	0	100
Looking after our heritage is important in creating jobs and boosting the economy						
SA Metro	13	37	42	7	1	100
SA Regional	20	33	29	18	0	100
Total SA	15	36	39	10	1	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
Heritage plays an important part in Australia's culture						
SA Metro	31	55	11	3	0	100
SA Regional	50	37	10	2	0	100
Total SA	36	50	11	3	0	100
We protect too much heritage						
SA Metro	3	5	29	43	21	100
SA Regional	2	0	23	42	32	100
Total SA	2	4	27	43	24	100
It is possible to keep heritage places and provide for the needs of today						
SA Metro	26	61	12	2	0	100
SA Regional	24	49	26	0	0	100
Total SA	25	58	15	1	0	100
My life is richer for having the opportunity to visit or see heritage						
SA Metro	24	53	15	6	2	100
SA Regional	24	56	16	3	0	100
Total SA	24	54	16	5	1	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
I don't know what heritage activities are taking place in my area						
SA Metro	9	34	33	22	3	100
SA Regional	2	32	28	33	4	100
Total SA	7	33	32	25	3	100
Australia's heritage is not relevant to me or my family						
SA Metro	3	4	14	56	23	100
SA Regional	2	0	15	54	28	100
Total SA	3	3	14	56	24	100
Heritage is a part of Australia's identity						
SA Metro	40	53	7	1	0	100
SA Regional	45	40	6	0	8	100
Total SA	41	50	6	1	2	100
It is important to protect heritage places even though I may never visit them						
SA Metro	42	51	6	2	1	100
SA Regional	52	47	0	0	0	100
Total SA	44	50	4	1	0	100

Figure E.5

SOUTH AUSTRALIA'S OVERALL FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (UNITS)



Note: The maximum number of units for a category is 1000, which is equivalent to 100 per cent of respondents ranking the category as their first priority. The lower bound may vary because of the opportunity provided to respondents to nominate an optional category. In practice, the lower bound is close to 100 units

Table E.20
PROPORTION OF RESPONDENTS WHO RANKED THE FOLLOWING ISSUES FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (PER CENT)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Education about heritage											
SA Metro	17.9	15.3	13.0	15.1	11.9	5.2	8.4	7.4	3.5	2.4	100
SA Regional	22.6	12.2	10.5	5.7	18.9	8.8	10.6	7.4	1.5	1.5	100
Total SA	19.1	14.6	12.4	12.8	13.6	6.1	8.9	7.4	3.0	2.2	100
Re-using historic buildings											
SA Metro	15.7	13.2	18.5	8.3	11.8	9.0	7.7	7.5	7.3	1.0	100
SA Regional	8.7	21.1	10.2	7.6	23.0	11.9	7.0	1.5	9.0	0.0	100
Total SA	13.9	15.2	16.4	8.1	14.6	9.7	7.5	6.0	7.7	0.8	100
Protecting non-built heritage (e.g. cemeteries, shipwrecks, old mines)											
SA Metro	6.4	17.8	20.5	15.2	9.1	6.5	8.8	5.5	7.2	2.9	100
SA Regional	7.7	17.4	21.3	11.5	5.7	6.7	18.6	0.0	11.0	0.0	100
Total SA	6.7	17.7	20.7	14.3	8.3	6.6	11.3	4.1	8.1	2.2	100
Improved public access to historic buildings and places											
SA Metro	13.3	9.2	14.5	14.8	9.3	15.8	12.4	8.5	1.2	1.1	100
SA Regional	23.9	9.3	12.0	21.6	3.8	12.8	0.0	1.5	15.1	0.0	100
Total SA	16.0	9.2	13.9	16.5	7.9	15.1	9.3	6.7	4.7	0.8	100

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Better information on how people can look after their heritage											
SA Metro	2.2	10.5	11.5	13.5	18.0	16.8	14.1	7.5	2.5	3.5	100
SA Regional	2.2	3.1	20.6	13.1	24.6	17.6	14.7	2.8	1.3	0.0	100
Total SA	2.2	8.6	13.7	13.4	19.7	17.0	14.2	6.4	2.2	2.6	100
Exploring the heritage of different cultures in the local area											
SA Metro	2.4	5.7	4.5	12.9	14.2	18.1	11.7	15.7	10.9	3.8	100
SA Regional	10.0	4.1	16.6	7.8	0.0	14.0	11.7	25.6	8.6	1.5	100
Total SA	4.3	5.3	7.6	11.6	10.7	17.1	11.7	18.2	10.3	3.2	100
Looking after historic heritage											
SA Metro	22.5	10.7	5.3	13.3	15.0	9.1	6.9	9.1	6.1	1.9	100
SA Regional	15.2	18.0	6.1	12.7	14.8	7.9	18.2	4.8	2.2	0.0	100
Total SA	20.7	12.6	5.5	13.1	15.0	8.8	9.8	8.0	5.2	1.4	100
Improved protection and recognition or more recent heritage (post 1950)											
SA Metro	3.3	6.9	6.7	3.0	4.1	13.7	15.9	23.6	19.8	3.1	100
SA Regional	0.0	10.6	0.0	15.0	4.4	8.4	14.1	24.2	19.9	3.5	100
Total SA	2.5	7.8	5.0	6.0	4.1	12.4	15.4	23.7	19.8	3.2	100
Buying out or compensating owners of properties who lose development opportunities as a result of heritage listing											
SA Metro	7.1	9.1	3.6	3.3	5.9	3.7	12.7	9.1	37.1	8.3	100
SA Regional	8.0	4.1	0.0	5.0	4.8	9.3	1.3	25.4	22.8	19.2	100
Total SA	7.3	7.9	2.7	3.7	5.6	5.1	9.9	13.2	33.5	11.1	100

E.6 Tasmania

Table E.21

PROPORTION OF RESPONDENTS WHO ANSWERED: DO YOU THINK ENOUGH IS BEING DONE ACROSS AUSTRALIA TO PROTECT HISTORIC HERITAGE? (PER CENT)

	No, too little is being done	Yes, about right	Too much is being done	Don't know	Total
Total TAS.	57.9	39.1	3.0	0.0	100

Table E.22

PROPORTION OF RESPONDENTS WHO ANSWERED: HISTORIC HERITAGE PROTECTION IS FUNDED BY ALL LEVELS OF GOVERNMENT. IF MORE FUNDS WERE TO BECOME AVAILABLE, WHERE DO YOU THINK THE ADDITIONAL MONEY SHOULD BE SPENT? (PER CENT)

	Places of significance to the nation	Places of significance to your State or Territory	Places of significance to your local area	Don't know	Total
Total TAS.	46.9	40.2	9.4	3.5	100

Table E.23

PROPORTION OF RESPONDENTS WHO ANSWERED: TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT HERITAGE?

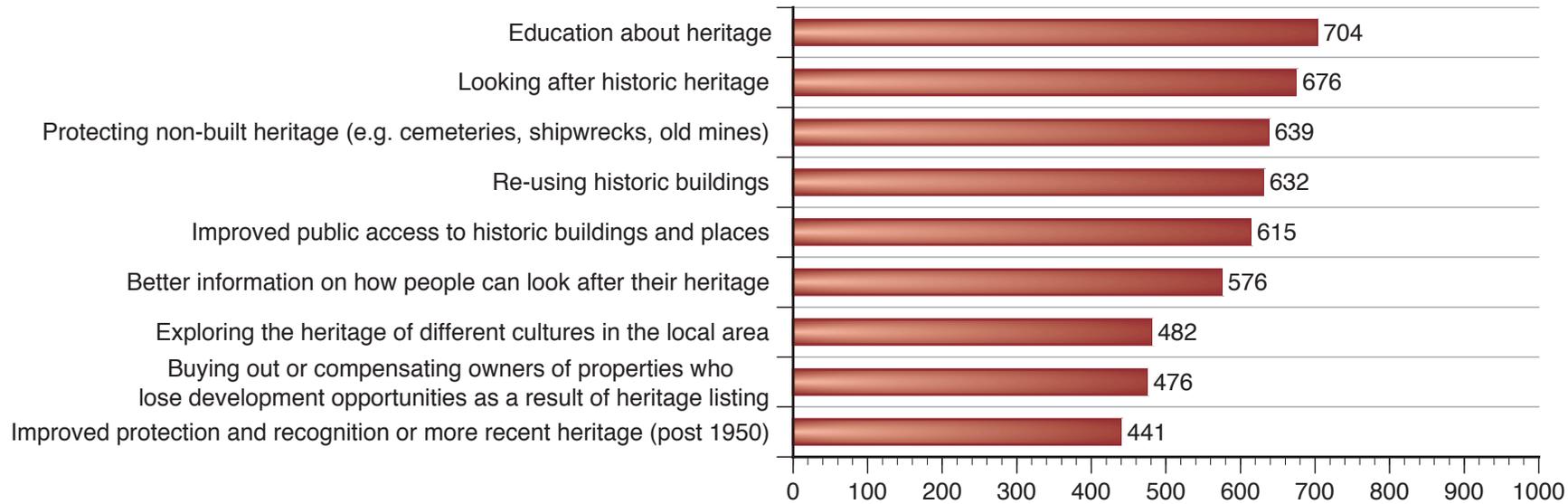
	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
It is important to educate children about heritage						
Total TAS.	60	37	4	0	60	100
It is important to keep historic features wherever possible when trying to improve towns and cities						
Total TAS.	65	32	3	0	0	100
Built heritage can mean small and modest places as well as grand historic buildings and churches						
Total TAS.	51	44	5	1	0	100
The historic buildings in my local area are worth saving and are important parts of heritage						
Total TAS.	47	46	6	1	0	100
The historic houses in my local area are an important part of the area's character and identity						
Total TAS.	47	41	8	3	0	100
Celebrating heritage is important						
Total TAS.	37	47	16	1	0	100
Heritage can mean recent as well as old buildings						
Total TAS.	20	45	21	13	1	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
Looking after our heritage is important in creating jobs and boosting the economy						
Total TAS.	22	49	21	8	2	100
Heritage plays an important part in Australia's culture						
Total TAS.	41	51	6	1	1	100
We protect too much heritage						
Total TAS.	2	9	18	40	30	100
It is possible to keep heritage places and provide for the needs of today						
Total TAS.	27	60	13	1	1	100
My life is richer for having the opportunity to visit or see heritage						
Total TAS.	36	43	16	5	0	100
I don't know what heritage activities are taking place in my area						
Total TAS.	4	36	17	39	4	100
Australia's heritage is not relevant to me or my family						
Total TAS.	0	2	14	43	42	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
Heritage is a part of Australia's identity						
Total TAS.	51	44	4	1	0	100
It is important to protect heritage places even though I may never visit them						
Total TAS.	44	47	5	1	3	100

Figure E.6

TASMANIA'S OVERALL FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (UNITS)



Note: The maximum number of units for a category is 1000, which is equivalent to 100 per cent of respondents ranking the category as their first priority. The lower bound may vary because of the opportunity provided to respondents to nominate an optional category. In practice, the lower bound is close to 100 units

Table E.24

PROPORTION OF RESPONDENTS WHO RANKED THE FOLLOWING ISSUES FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (PER CENT)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Education about heritage											
Total TAS.	22.5	14.3	12.7	12.8	10.5	5.7	12.6	2.1	4.8	2.1	100
Re-using historic buildings											
Total TAS.	10.4	16.2	10.7	12.2	10.8	13.3	10.0	10.5	2.7	3.3	100
Protecting non-built heritage (e.g. cemeteries, shipwrecks, old mines)											
Total TAS.	8.3	10.2	19.3	17.9	8.8	12.9	8.3	7.4	5.9	1.1	100
Improved public access to historic buildings and places											
Total TAS.	7.4	9.1	16.7	14.9	17.5	9.2	5.3	11.6	6.9	1.6	100
Better information on how people can look after their heritage											
Total TAS.	6.7	9.3	8.1	10.4	18.7	15.0	13.2	11.7	5.7	1.1	100
Exploring the heritage of different cultures in the local area											
Total TAS.	2.2	11.1	8.5	3.8	8.1	14.4	13.4	18.4	15.3	4.8	100

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Looking after historic heritage											
Total TAS.	22.4	12.3	14.0	9.3	7.4	3.7	16.5	8.6	3.8	2.1	100
Improved protection and recognition or more recent heritage (post 1950)											
Total TAS.	3.2	6.2	3.7	8.6	9.5	11.6	9.7	18.2	24.7	4.6	100
Buying out or compensating owners of properties who lose development opportunities as a result of heritage listing											
Total TAS.	10.1	9.6	5.2	7.1	7.2	8.7	6.8	9.3	20.3	15.8	100

E.7 Australian Capital Territory

Table E.25

PROPORTION OF RESPONDENTS WHO ANSWERED: DO YOU THINK ENOUGH IS BEING DONE ACROSS AUSTRALIA TO PROTECT HISTORIC HERITAGE? (PER CENT)

	No, too little is being done	Yes, about right	Too much is being done	Don't know	Total
Total ACT	72.1	20.6	4.6	2.6	100

Table E.26

PROPORTION OF RESPONDENTS WHO ANSWERED: HISTORIC HERITAGE PROTECTION IS FUNDED BY ALL LEVELS OF GOVERNMENT. IF MORE FUNDS WERE TO BECOME AVAILABLE, WHERE DO YOU THINK THE ADDITIONAL MONEY SHOULD BE SPENT? (PER CENT)

	Places of significance to the nation	Places of significance to your State or Territory	Places of significance to your local area	Don't know	Total
Total ACT	68.8	16.6	13.6	1.0	100

Table E.27

PROPORTION OF RESPONDENTS WHO ANSWERED: TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT HERITAGE?

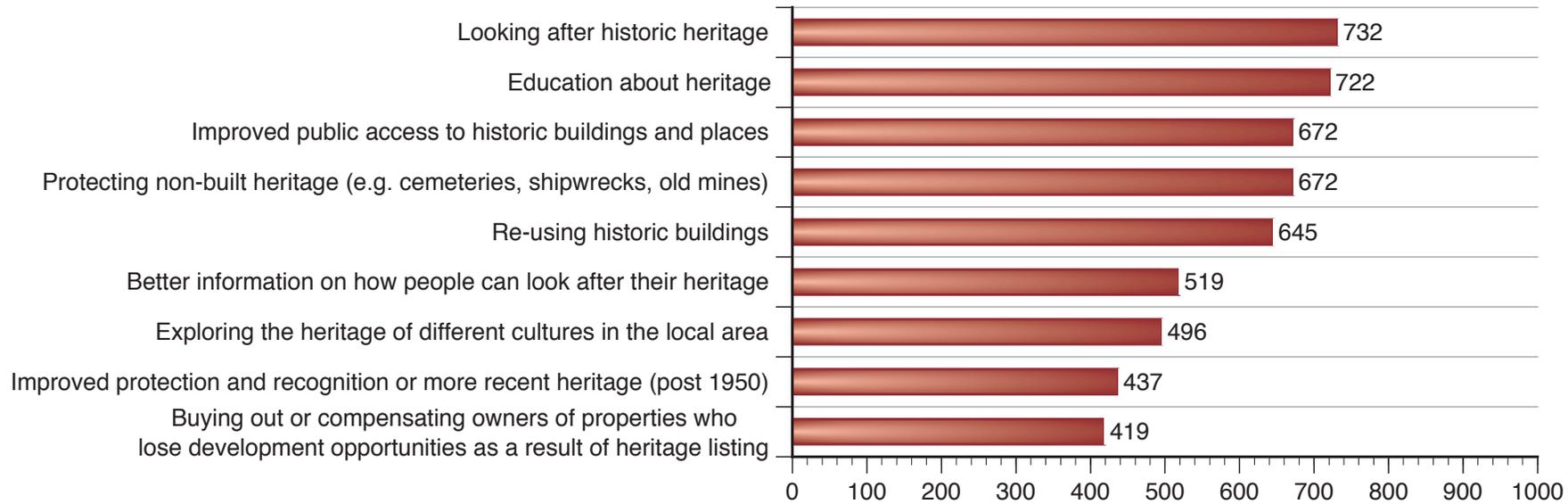
	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
It is important to educate children about heritage						
Total ACT	64	33	2	0	0	100
It is important to keep historic features wherever possible when trying to improve towns and cities						
Total ACT	63	31	5	0	0	100
Built heritage can mean small and modest places as well as grand historic buildings and churches						
Total ACT	62	35	1	1	0	100
The historic buildings in my local area are worth saving and are important parts of heritage						
Total ACT	50	36	12	1	1	100
The historic houses in my local area are an important part of the area's character and identity						
Total ACT	47	35	12	5	1	100
Celebrating heritage is important						
Total ACT	40	45	14	1	0	100
Heritage can mean recent as well as old buildings						
Total ACT	26	47	18	8	0	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
Looking after our heritage is important in creating jobs and boosting the economy						
Total ACT	18	49	22	10	1	100
Heritage plays an important part in Australia's culture						
Total ACT	46	41	10	2	1	100
We protect too much heritage						
Total ACT	1	3	28	42	27	100
It is possible to keep heritage places and provide for the needs of today						
Total ACT	34	56	10	0	0	100
My life is richer for having the opportunity to visit or see heritage						
Total ACT	30	53	14	0	3	100
I don't know what heritage activities are taking place in my area						
Total ACT	7	25	26	39	3	100
Australia's heritage is not relevant to me or my family						
Total ACT	2	2	9	49	38	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
Heritage is a part of Australia's identity						
Total ACT	45	48	5	1	1	100
It is important to protect heritage places even though I may never visit them						
Total ACT	39	54	5	1	0	100

Figure E.7

AUSTRALIAN CAPITAL TERRITORY'S OVERALL FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (UNITS)



Note: The maximum number of units for a category is 1000, which is equivalent to 100 per cent of respondents ranking the category as their first priority. The lower bound may vary because of the opportunity provided to respondents to nominate an optional category. In practice, the lower bound is close to 100 units

Table E.28
PROPORTION OF RESPONDENTS WHO RANKED THE FOLLOWING ISSUES FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (PER CENT)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Education about heritage											
Total ACT	22.1	13.0	17.6	12.0	9.8	7.7	10.6	5.5	1.9	0.0	100
Re-using historic buildings											
Total ACT	8.6	16.8	13.9	10.3	16.5	12.7	6.4	10.0	1.9	2.9	100
Protecting non-built heritage (e.g. cemeteries, shipwrecks, old mines)											
Total ACT	9.2	16.5	17.6	13.1	15.4	11.0	6.6	4.7	3.8	1.9	100
Improved public access to historic buildings and places											
Total ACT	12.3	15.7	13.8	18.3	6.6	12.2	11.9	3.7	5.6	0.0	100
Better information on how people can look after their heritage											
Total ACT	2.8	3.7	9.1	12.9	13.8	16.7	16.6	13.4	10.1	0.9	100
Exploring the heritage of different cultures in the local area											
Total ACT	4.8	6.5	5.7	6.4	13.2	15.6	18.5	10.9	15.7	2.6	100
Looking after historic heritage											
Total ACT	31.8	14.7	8.6	10.1	9.4	4.6	9.3	4.9	3.8	2.7	100

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Improved protection and recognition or more recent heritage (post 1950)											
Total ACT	0.0	4.6	5.3	10.5	8.5	14.1	10.0	27.5	15.8	3.7	100
Buying out or compensating owners of properties who lose development opportunities as a result of heritage listing											
Total ACT	6.3	8.5	5.5	3.6	5.8	3.6	7.3	16.5	35.3	7.5	100

E.8 Northern Territory

Table E.29

PROPORTION OF RESPONDENTS WHO ANSWERED: DO YOU THINK ENOUGH IS BEING DONE ACROSS AUSTRALIA TO PROTECT HISTORIC HERITAGE? (PER CENT)

	No, too little is being done	Yes, about right	Too much is being done	Don't know	Total
Total NT.	83.0	14.0	3.0	0.0	100

Table E.30

PROPORTION OF RESPONDENTS WHO ANSWERED: HISTORIC HERITAGE PROTECTION IS FUNDED BY ALL LEVELS OF GOVERNMENT. IF MORE FUNDS WERE TO BECOME AVAILABLE, WHERE DO YOU THINK THE ADDITIONAL MONEY SHOULD BE SPENT? (PER CENT)

	Places of significance to the nation	Places of significance to your State or Territory	Places of significance to your local area	Don't know	Total
Total NT.	55.0	23.1	18.9	3.0	100

Table E.31

PROPORTION OF RESPONDENTS WHO ANSWERED: TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT HERITAGE?

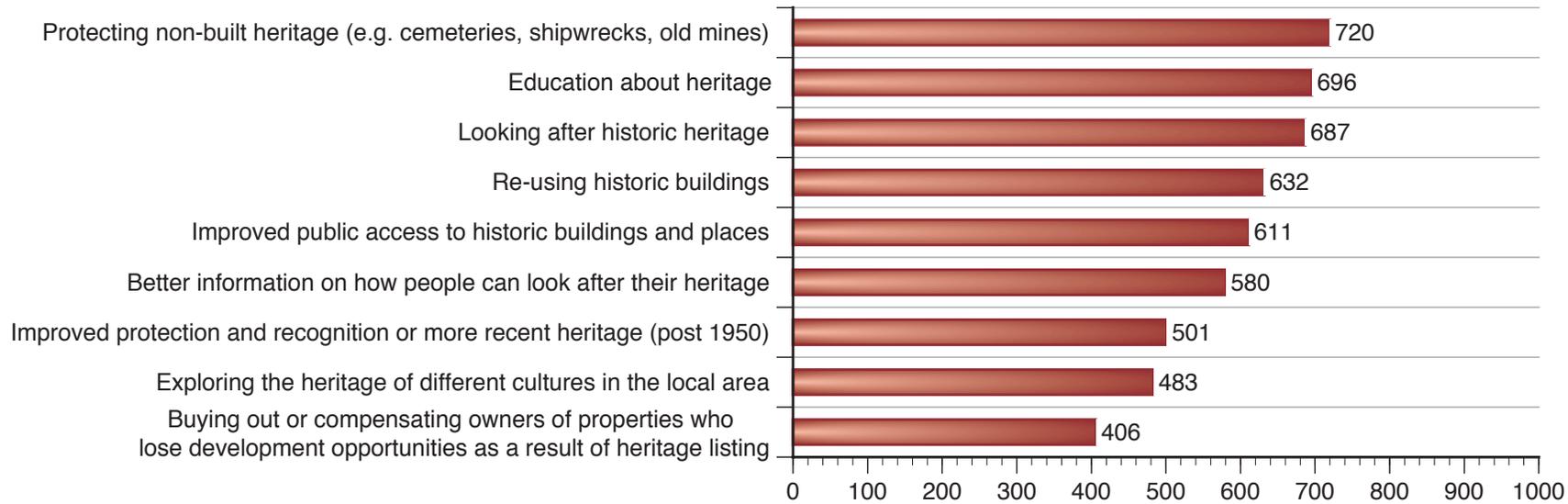
	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
It is important to educate children about heritage						
Total NT.	67	34	0	0	0	100
It is important to keep historic features wherever possible when trying to improve towns and cities						
Total NT.	66	30	4	0	0	100
Built heritage can mean small and modest places as well as grand historic buildings and churches						
Total NT.	64	32	4	0	0	100
The historic buildings in my local area are worth saving and are important parts of heritage						
Total NT.	44	36	20	0	0	100
The historic houses in my local area are an important part of the area's character and identity						
Total NT.	58	23	18	2	0	100
Celebrating heritage is important						
Total NT.	29	58	12	2	0	100
Heritage can mean recent as well as old buildings						
Total NT.	15	53	18	14	0	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
Looking after our heritage is important in creating jobs and boosting the economy						
Total NT.	19	26	50	5	0	100
Heritage plays an important part in Australia's culture						
Total NT.	42	52	4	2	0	100
We protect too much heritage						
Total NT.	4	0	21	47	28	100
It is possible to keep heritage places and provide for the needs of today						
Total NT.	29	64	4	2	0	100
My life is richer for having the opportunity to visit or see heritage						
Total NT.	20	64	12	4	0	100
I don't know what heritage activities are taking place in my area						
Total NT.	5	9	28	50	8	100
Australia's heritage is not relevant to me or my family						
Total NT.	0	2	17	55	26	100

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Total
Heritage is a part of Australia's identity						
Total NT.	43	52	5	0	0	100
It is important to protect heritage places even though I may never visit them						
Total NT.	50	44	7	0	0	100

Figure E.8

NORTHER TERRITORY'S OVERALL FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (UNITS)



Note: The maximum number of units for a category is 1000, which is equivalent to 100 per cent of respondents ranking the category as their first priority. The lower bound may vary because of the opportunity provided to respondents to nominate an optional category. In practice, the lower bound is close to 100 units

Table E.32
PROPORTION OF RESPONDENTS WHO RANKED THE FOLLOWING ISSUES FOR THE QUESTION: IF MORE MONEY WAS TO BE SPENT ON HERITAGE ISSUES, WHICH OF THE FOLLOWING WOULD YOU CHOOSE TO SPEND IT ON? (PER CENT)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Education about heritage											
Total NT.	23.1	4.3	11.4	11.6	30.1	4.3	8.4	4.3	2.4	0.0	100
Re-using historic buildings											
Total NT.	17.0	7.9	17.9	3.0	16.5	13.3	0.0	12.9	11.6	0.0	100
Protecting non-built heritage (e.g. cemeteries, shipwrecks, old mines)											
Total NT.	17.9	30.8	9.7	7.3	0.0	9.2	16.6	5.4	3.0	0.0	100
Improved public access to historic buildings and places											
Total NT.	5.4	4.9	25.7	17.9	3.0	16.5	10.3	8.4	8.0	0.0	100
Better information on how people can look after their heritage											
Total NT.	2.4	19.6	0.0	6.7	19.5	23.4	16.3	9.2	3.0	0.0	100
Exploring the heritage of different cultures in the local area											
Total NT.	6.0	4.9	9.3	12.2	7.9	8.4	4.3	23.9	18.9	4.3	100
Looking after historic heritage											
Total NT.	14.1	20.4	12.7	20.7	7.3	0.0	8.9	9.2	2.4	4.3	100

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	Total
Improved protection and recognition or more recent heritage (post 1950)											
Total NT.	4.3	4.3	7.3	8.4	10.4	15.7	28.5	7.9	10.3	3.0	100
Buying out or compensating owners of properties who lose development opportunities as a result of heritage listing											
Total NT.	7.3	3.0	6.0	12.2	2.4	5.0	0.0	14.6	40.4	9.2	100

Appendix F

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