This report was commissioned by the Heritage Council of Victoria in 2023 to understand the existing research on the value of heritage to the community. The Heritage Council is pleased to share this resource publicly.

It contains a synthesis of current research on:

* the social, economic, and environmental value of heritage to Australian communities
* a summary of some of the gaps in the available research.

Its primary focus is on research from Australia, but it also includes relevant data from overseas.

The report is the work of Public Value Consulting with Extent Heritage, and is provided without edit. The content, research priorities, and recommendations are the views of the authors and have not been endorsed by the Heritage Council.

The Heritage Council thanks Kate Clark, Leo Martin and Vivian Lu for their extensive investigation, and thorough reporting and documentation of publicly available research. The report paints a picture of the breadth of resource material. Publication of the report by the Council is intended to encourage industry discussion and further research in emerging areas of interest.

**Why heritage?**

**a synthesis of evidence for the social, economic and environmental impacts of cultural heritage**

Report for the Heritage Council of Victoria

2023

**Overview**

**Main report**

**Annexes**

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with

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August 2023

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This report acknowledges Dhawura Ngilan – the vision for Aboriginal and Torres Strait Islander heritage in Australia and the best practice standards in Indigenous cultural heritage management and legislation.[[1]](#footnote-2) This stresses the importance of Indigenous leadership, self-determination and engagement in relation cultural heritage. We also acknowledge Our Knowledge, Our Way, the guide to Indigenous-led approaches to strengthening and sharing their knowledge for land and sea management.[[2]](#footnote-3)

**Disclaimer**

This is a report to the Heritage Council of Victoria. Whilst the report has been developed in consultation with council members, the final report represents the views of the consultants and not those of the Heritage Council of Victoria. The recommendations are simply matters for consideration.

The information in this report has been sourced from desktop research, publications and websites. Whilst all due care has been taken in compiling this document PVC and Extent Heritage accept no responsibility for accurateness and completeness of information gained from these resources.

Note that we are heritage specialists and do not claim expertise in economics, sciences, public health or other research disciplines. We are therefore not qualified to comment on the robustness of the data, the quality of research or methodologies for studies cited here.

Users should exercise their own care and judgement and refer to the original research to understand the full implications of the cited work including limitations.

**Thank you**

We would like to thank the members of the Heritage Council of Victoria’s Steering Committee, and staff from both the Heritage Council of Victoria’s Secretariat and, Heritage Victoria, as well as Jim Gard’ner of GJM Heritage and others for their invaluable assistance in helping to source material.

# Structure of this report

**Overview**

This section includes an **executive summary** for the report. Headline findings from the report are set out in a graphic and a list of ten **heritage myths** setting out some of the key assumptions about heritage and the evidence that does (or does not) support them. A table summarises **gaps** in the research.

**Main report**

The main report reviews existing evidence for the social, environmental and economic impact of engaging with or caring for cultural heritage. The evidence is grouped around five chapters, focussed on public policy agendas for Victoria where heritage can make a potential contribution.

Chapter 1 reviews evidence for the **social impact** of heritage, chapter 2 looks at evidence for the role of heritage in addressing **environmental issues** (focussing on the built environment). Chapter 3 explores the role of heritage in **planning and place-making**, and chapter 4 looks at the link between heritage andthe **arts**. Chapter 5 reviews the contribution of heritage to **economic prosperity**. Chapter 6 describes **research gaps** in more detail, including immediate priorities for Victoria, and topics that might benefit from collaboration between agencies to avoid repetition.

The epilogue identifies four big underpinning strategic heritage policy research questions that have emerged from this report:

* learning from Indigenous approaches to cultural heritage,
* the role of heritage in wellbeing,
* the role of heritage conservation in addressing climate change, and
* the potential for more sophisticated economic modelling using a culture and heritage capital model adapted from natural capital approaches.

A **glossary** defines terms as they are used in this report. There is a separate **list of abbreviations** and a full **bibliography**.

**Annexes**

The project started with heritage stocktake for Victoria. The first part of that stocktake is in Annex 1 which provides data on heritage a**ctivities** in Victoria including the different ways that people engage with heritage and also funding for heritage. The second part in Annex 2 provides data heritage **assets** and their condition.

Annex 3 summarises research on **attitudes to heritage** in Australia – this is not included in the main report as it is not strictly evidence for the difference heritage can make to social, economic or environmental policy outcomes but is relevant to understanding the social and economic values of heritage.

This is a fast-growing field of research, and this report does not claim to be comprehensive. Therefore Annex 4 directs readers to **other recent syntheses** for Australia and internationally, including some recent systematic evidence reviews whilst Annex 5 identifies **web resources** for finding further research and evidence.

# **OVERVIEW**

**Executive summary**

This report synthesises evidence for the economic, social and environmental impacts of cultural heritage in Victoria. It takes a broad view of cultural heritage covering both heritage activities and assets, as many of the impacts of cultural heritage arise not just from the assets themselves, but how people engage with them.



Figure 1 Cultural heritage activities and assets

The focus is on evidence for the **impact** of engaging with cultural heritage, covering both the impact of taking part in heritage activities and cultural heritage assets. The report is not about the significance of heritage in the sense of assessing the different cultural values or thresholds of significance that might justify a decision to protect a heritage object, place or collection. Instead, it is about the **difference** that engaging with or caring for heritage can make to people, the economy and the environment.



Figure 2 Engaging with heritage (Puffing Billy)

The report synthesises a wide range of evidence across multiple disciplines, including the work of cultural economists, social scientists, property economists, planners, psychologists and other scientists, drawing on both peer-reviewed publications and grey literature.

In compiling this report, we have been inspired by the work of Indigenous scholars and policy makers who are leading the way in showing how cultural heritage plays a foundational role in other aspects of our lives, including health, design, place-making, the economy and the natural environment. We have cited some of that work but recognise that there is much more to learn.

We also acknowledge the ground-breaking State of Victoria’s Aboriginal Cultural Heritage Report 2016-21 compiled by the Victorian Aboriginal Heritage Council.[[3]](#footnote-4) This is a powerful overview of current issues relating to the management of Aboriginal cultural heritage in Victoria which takes a wide view of cultural heritage and also explores some of the wider economic and environmental issues relating to Aboriginal cultural heritage as well as issues relating to health and wellbeing, education, healing and succession. As well as being critical to Aboriginal Cultural Heritage, many of the core principles and approaches to cultural heritage in the report, including the strong connections between cultural heritage and wider economic, social and environmental outcomes, may be of relevance to cultural heritage more widely.

Whist the heritage sector can work with economists to monetise social, environmental and cultural values in dollar terms to give heritage greater weight in public policy decisions, in Australia we also have the opportunity to learn from the oldest culture in the world about how connections to cultural heritage have the power to improve our lives and make a better world in ways that can’t necessarily be expressed in dollars.

As this is the most recent of several reviews of the economic or social value of cultural heritage, we have tried to add value by taking a different approach.

As well as reviewing evidence for impact (rather than values) we have grouped the findings under themes and topics linked to current Victorian government policies such as policies on waste of the creative industries). Many of these are areas where heritage has the biggest potential to contribute to the government’s own ambitions, but that contribution is perhaps not recognised. The aim is to assist the Heritage Council of Victoria in making the connection between heritage and other public policy agendas.



Figure 3 Themes and topics used in this report

Chapter One explores evidence for the **social impact** of investing in cultural heritage assets and activities through its potential role in education, health, cultural equity and social capital. Many of those impacts arise from the way people **participate** in heritage activities:

* many Australians see **education** as a key reason for preserving heritage and heritage sites, parks, museums across Victoria provide a wide range of rich educational opportunities for young people across all areas of the curriculum. Heritage institutions are also significant providers of primary research in their own right,
* in Australia there is growing recognition of the role of cultural heritage in **health,** and engaging with heritage sites such as Rail Trails or connecting with Aboriginal gathering places can potentially contribute both mental and physical health benefits,
* Victoria is home to one of the most **culturally diverse societies** in the world and cultural heritage can play an important role in identity, belonging and inclusion. Australians want to protect their own heritage but also recognise the diversity of Australian culture and have a strong desire to understand the heritage of cultures other than their own. From Bonegilla Migrant camp to the Islamic Museum, Victorian heritage organisations have been actively working to preserve a wider and more diverse range of heritage, and
* heritage can also play a role in communities and networks**.** The strong personal networks created through genealogy and local family history societies, the connections created by the significant level of volunteering across heritage and initiatives to involve people in local decision-making help build **social capital** through engaging with heritage.

Addressing climate change is a key priority for the Victorian government.Chapter 2 explores the contribution of heritage to the **environment**, focussing on retrofitting existing buildings as a powerful tool in both reducing carbon emissions from the built environment and contributing to the circular economy. We found that:

* older buildings are often seen as less energy efficient than new buildings but standards for energy efficiency and retrofitting don’t always recognise the value of **embodied energy** in existing buildings or the value of low-cost everyday activities to improve thermal comfort. There is also much to learn from the design of older buildings,
* **traditional building skills** and technology can help avoid ‘maladaptation’ – retrofitting that could worsen rather than improve building performance, and
* a third of Australian waste comes from demolition and construction, so conserving existing buildings (and other forms of heritage) can contribute to Victorian policies for the **circular economy.**

Cultural heritage is an important consideration in the Victorian planning system, but it can be seen as a problem rather than an opportunity. Chapter three explores the role of heritage in **placemaking,** or creating better places to live:

* heritage can contribute to a sense of **regional and urban identity** from Flinders Street Station and the iconic Melbourne tram to the landscapes and places of the gold rush; it also underpins the important role of cultural heritage in tourism and visitor experiences,
* **revitalisation and renewal** are core to the economic and social performance of towns and cities. Poorly maintained places can impact negatively on people’s wellbeing, sense of belonging and indeed prosperity. Most of the heritage grants in Victoria address revitalisation and renewal by repairing run down historic buildings and objects in rural and urban areas across Victoria,
* research suggests links between heritage and people’s **attachment to place,** which is in turn often linked to issues such as life satisfaction and civic engagement, and
* the loss of places can have a devastating effect on both individuals and communities. Storytelling and cultural mapping can be part of the disaster recovery process.

Cultural heritage is key to the new national cultural policy and has a vital role to play in supporting arts and creative industries in Victoria. Chapter four explores the value of heritage in terms of **arts and creativity**:

* **storytelling** is a powerful source of connection and healing. It is also central to cultural heritage, from the stories emerging through archaeological sources beneath the streets of Melbourne to the role of yarning and storytelling in building respectful relationships and preserving and passing on cultural knowledge. Heritage sites and practices also enable difficult stories to be explored and heard,
* heritage inspires **creativity** - some of our most creative artists, architects and writers have been inspired by their own cultural heritage and that of others, whilst heritage sites are often serve as important creative spaces in towns and cities, and
* historic areas also play a key role in the success of the **creative industries** where there is a body of international research that shows that some of the most successful creative business can be found in historic areas and buildings.

The contribution of heritage activities and assets to the wider economy is often unrecognised, so chapter five explores the role of cultural heritage in economic prosperity:

* SGS Economics & Planning has assessed the value of services provided by cultural heritage assets to the Victorian economy at $1.1 billion each year and note that even that is likely an underestimate,
* studies consistently show that listed heritage properties achieve premium prices or at worst prices that are no different to other properties (although that so-called heritage advantage can fall if the area is run down),
* culture and heritage visitors play a vital role in the tourism economy – staying longer and spending more than other types of visitors and delivering benefits, particularly to regional Victoria, and
* the heritage sector creates jobs across arts and culture, tourism, in construction and the environment in both the public and private sectors. We don’t have specific data for the sector in Victoria, but between 2011 and 2019 the heritage sector in the UK grew by 24% - outstripping the rest of the economy. Research from the US suggests that repair and refurbishment creates more jobs than new building, and with the need for retrofitting skills and know how, this sector is likely to grow.

We were asked to identify significant gaps in the evidence for the economic, social and environmental impact of heritage. These are set out in chapter 6 and are intended to be the basis for further discussion. In line with the overall approach, the gaps are focussed on critical topics needed to build a better foundation for evidence-based policy making in heritage.

We have suggested three groups of priorities. There are immediate priorities for HCV, such as understanding the barriers and opportunities for retrofitting and more targeted property price studies to address specific concerns over heritage overlays. There is almost no social research regarding heritage in Victoria, but it might start with the health benefits of engaging with heritage or the link between heritage volunteering and social capital.

Other research might be better taken forward in collaboration with other Australian heritage agencies, such as heritage in disaster recovery, a more comprehensive picture of the economic contribution of the sector across different Australian Bureau of Statistics (ABS) domains and the evidence for cultural heritage and health in Australia. There are also some systemic challenges around public sector heritage policy research, including the lack of a heritage data observatory and the difficulty of sourcing ‘grey’ literature.

Underpinning these gaps are four more strategic heritage policy research questions set out in the epilogue. These are big questions that might benefit from working in collaboration with universities and other government agencies:

1. How can Indigenous thinking about the wider role of cultural heritage in the world around us be better known and mainstreamed?
2. How can the role of conserving cultural heritage as a strategy to address climate breakdown be better understood?
3. How can we better capture the contribution that conserving cultural heritage can make to addressing climate breakdown?
4. Should we move towards more systemic economic modelling for cultural heritage using a culture and heritage capital model adapted from natural environment models?

The foundation for the project was a heritage stocktake for Victoria. This covers both heritage activities (Annex 1) and assets (Annex 2), as much of the evidence for the difference that heritage can make comes from engaging with heritage, rather than simply the assets themselves. That stocktake reveals the many ways in which people engage with cultural heritage, from the thriving technological heritage sector through to caring for Country. It reveals the diversity of public sector funding for heritage, from areas such as regional development, creative industries and transport. The stocktake notes the wide range of protected and unprotected cultural heritage assets, including both Indigenous and non-Indigenous heritage, and concerns about the condition of many those assets.

As the field of heritage policy research is growing so fast, this report cannot hope to be comprehensive, so we have also pointed to some recent syntheses, including systematic literature reviews (Annex 4) and some of the web resources (Annex 5) that provide access to other data.

There have now been a range of studies exploring Australian attitudes to heritage including public views on heritage priorities, and audience research into the motivations and experiences of visitors. These are summarised in Annex 3 as it is important for policymakers to be aware of those findings, but they are not strictly studies that explore the difference that engaging with or caring for heritage can make to other outcomes.

In conclusion we return to an underlying thread from the whole project – learning from Indigenous approaches. Whist the heritage sector can work with economists to monetise social, environmental and cultural values in dollar terms to give heritage greater weight in public policy decisions, in Australia we also have the opportunity to learn from the oldest culture in the world about how connections to cultural heritage have the power to improve our lives and make a better world in ways that can’t necessarily be expressed in dollars.

Headline Figures

1. **80%** of Australians are involved in at least one heritage activity every year and the majority were involved in more than one.
2. Listed heritage buildings at best achieve **premium prices** in terms of property sales (and at worst prices that are no different to unlisted buildings).
3. Over **90%** of buildings on the VHR are in use every day by people and businesses. They are not monuments.
4. The **social benefits** of engaging with heritage include networks, friendships, exercise, creative inspiration and mental health benefits.
5. The greenest building is the one that already exists – if we ignore embodied carbon we underestimate the emissions from new buildings by 25%. Demolishing an existing building and replacing it with a new one contributes to an increase in carbon emissions.
6. Caring about your neighbourhood builds social connections and has wellbeing benefits.
7. Old buildings are good for creative industries. They are also great places to meet and enjoy events.
8. Heritage is worth **$1.1bn** to the Victorian economy each year (and that is an underestimate).
9. Culture and heritage visitors spend more and stay longer than other visitors.
10. Less than 10% of buildings in Victoria have heritage protections.

Figure 4 Headline findings

## Heritage myths

One of the priorities for the Heritage Council of Victoria (HCV) was to present complex research in an accessible way that can contribute to some of the challenges in communicating key messages about cultural heritage.

To help do that, this section tackles some of the common assumptions about the value of heritage in Australia and explores some of the evidence for (or against) those statements. This section pulls out some of the key findings of the more detailed research summarised in the main report and in the heritage stocktake.

1. **Australians don’t care about their heritage**

**False.** Most Australians are engaged with heritage and active in its preservation, at least on a personal level.In 2010 around 80% of Australians had been involved in at least one heritage activity from visiting a site to taking part in a festival or watching a heritage related media. They recognise that heritage is broad, includes both intangible and tangible heritage, and is not just about association with the post-colonial period. They often need to feel a personal connection with a given heritage element before they are willing to support its protection at a national level, but also recognise that heritage is a highly personal concept and acknowledge that some things that have no personal meaning to them might also be protected.[[4]](#footnote-5)

1. **Heritage listing will reduce the value of my house**

**Largely false**. Surveys show that many people **assume** that heritage protection reduces property values but over forty property price studies from Australia, the US and the UK show that buildings in historic districts, protected heritage buildings and buildings near heritage buildings at best achieve premium prices and at worst, achieve prices no different to unprotected buildings. Heritage buildings also create commercial returns. But if you buy a property intending to demolish it and develop the site, heritage listing – like any other form of planning control –may affect its development potential.[[5]](#footnote-6)

1. **Protecting heritage means ‘freezing’ sites**

**False.** Inclusion on the Victorian Heritage Register (VHR) or a local council Heritage Overlay does not stop development or change. The system of planning and heritage permits allows heritage sites and objects to be adapted, altered and changed. Only four heritage permits were refused by Heritage Victoria in 2020-21. Over 90% of sites on the VHR are in use every day as businesses or homes – they are not monuments, and the others are often industrial remains or sites that add character and distinctiveness to local places. Owners (and others) spent $1.25 billion on heritage building works in Victoria in 2021-2 (nearly 3% of all investment in building permits).[[6]](#footnote-7)

1. **Heritage is about more than a history lesson**

**True.** We get so much more than a history lesson when we engage with heritage including mental and physical health benefits, friendships and networks, connections with place, skills and confidence. For example, ‘exercise’ and ‘socialising with friends’ are the main reasons for visiting parks in Victoria which are often as important for their cultural heritage as their natural heritage.[[7]](#footnote-8) Education is also important - 97% of Australians consider heritage education to be ‘very important’ and 85% of parents believe that visits to museums should be part of the national curriculum.[[8]](#footnote-9)

1. **Older buildings are not environmentally sustainable – we need more energy efficient new buildings**

**False**. Our built environment is currently the world’s single largest contributor to greenhouse gas emissions. It consumes around 33% of our water and generates between 33% and 40% of our waste. As much as 25% of Australia’s carbon emissions come from buildings. However, energy efficiency schemes frequently ignore embodied energy, but the energy embodied in existing Australian buildings represents 10 years of energy consumption for the entire country. ‘Demolishing an existing building and replacing it with a new one will increase carbon emissions by 2050’ is the summary conclusion of the 2020 English report, ‘Know your home, know your carbon’.[[9]](#footnote-10)

1. **Caring about your neighbourhood is good for you**

**True.** People who are active in advocating for better quality developments in their areas are sometimes seen in a negative light. But people who are strongly attached to the places where they live often report a higher quality of life and better life satisfaction. And those with strong neighbourhood ties who are interested in their own roots and stories are likely to be more engaged in civic activity. There is also a link between caring about where you live and environmentally responsible behaviour.[[10]](#footnote-11)

1. **Creative industries are about the future – we don’t need heritage!**

**False.** Some of our greatest artists and writers have been inspired by their cultural heritage. Victoria has some fantastic examples of heritage sites that are creative hubs such as the old Abbotsford Convent which is now home to artists and community events. Creative businesses in heritage buildings do better - over a quarter of England’s creative businesses are in historic buildings or areas, and those in listed buildings generate an additional £13,000 GVA per business per year compared to those in unlisted buildings. Independent non-branded food and retail businesses (including fashion, creative industries, food) are the businesses most likely to be in heritage-listed buildings.[[11]](#footnote-12) Despite this, cultural heritage is often overlooked in strategies for creative industries.

1. **The heritage sector is a brake on the economy**

**False**. Cultural heritage is often seen as a brake on the economy. But cultural heritage has a role in health and social networks, in the environment and decarbonisation, in planning and development, in the arts and in employment in tourism and other sectors such as construction. In 2018 SGS Economics & Planning estimated the Total Economic Value of heritage to the Victorian economy as $1.1billion each year– and this is only part of the figure. It omits the value of heritage building works to the economy as well as the impact of culture and heritage visitors on the visitor economy. When England set out to measure the impact of the whole heritage sector, they found that the sector has a total GVA of £36.6 billion providing over 563,509 jobs in 2019. The sector grew by 24% between 2011 and 2019 – outstripping the rest of the UK economy.[[12]](#footnote-13)

1. **Cultural and heritage visitors spend more and stay longer than other visitors**

**True.** Around 78% of visitors to regional Victoria expect to experience Australia’s history. 30% of the international heritage visitors and 72% of the domestic overnight heritage visitors travelled to regional Victoria, with heritage tourism drawing up to 78% of tourists to some parts of regional Victoria.[[13]](#footnote-14) The idea that Victoria is the capital of culture with a rich tapestry of stories is central to the Victorian Visitor Economy Masterplan. In 2009 half of all international visitors to Australia were culture or heritage visitors and the 2010 Tourism Research Australia snapshot suggested that cultural visitors stayed longer and spent more than others.[[14]](#footnote-15) In 2019 Australians took almost 15million day trips to participate in arts and cultural activities, spending $1.9 billion.[[15]](#footnote-16) Around 15% of young people enjoyed arts and cultural events.[[16]](#footnote-17)

1. **You know we can’t protect everything!**

**True.** Despite the wider benefits of caring for cultural heritage, less than 10% of the building stock in Victoria is on the Heritage Overlay. Even fewer buildings have State heritage protection and far more buildings are being demolished than are protected. In 2020-21, ten places were added to the VHR.  For every building added to Australian heritage registers in 2019-20, 112 houses were demolished, and 618 new houses were built. So, most of the existing building stock, including most older buildings, have no heritage protections.

## Research gaps

This table summarises research gaps. They are discussed in more detail in Chapter 6 of the main report.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Strategic heritage research challenges**  *Research gaps that would benefit from wider collaboration between public sector agencies, universities and other partners in the public and private sectors* | **Australia-wide policy research gaps**  *Research gaps that may benefit from collaboration with other State, Territory and Federal heritage agencies (eg HCOANZ)* | **Priorities for the Heritage Council of Victoria**  *Suggested short term priorities for the HCV arising from this report.* |
| **Learning from Indigenous thinking** | **Learning from Indigenous thinking and practice**  Much of the thinking about the link between cultural heritage and other aspects of our lives including the economy, health, place and wellbeing has been pioneered by Indigenous scholars – what lessons are there and how might it shape a uniquely Australian approach? | Review of current Indigenous initiatives across Australia that embed cultural heritage in wider environmental, health or planning policy, such as designing with Country, or cultural heritage in health research. | Literature review of current work in Victoria relating Indigenous thinking about cultural heritage and wellbeing, placemaking design or environment. |
| **Heritage and society** | **The role of cultural heritage in wellbeing in Australia**  How can we embed cultural heritage in current Australian thinking about wellbeing and what can we learn from other countries such as Wales? Is there a uniquely Australian approach? What can we learn from Indigenous thinking (see below)? | A review of the Australian literature on the cultural determinants of health across all communities including issues such as the role of cultural heritage in healing | Mapping the cultural heritage ecosystem in Victoria to understand how people engage with heritage |
| Understanding the health impacts of engaging with heritage in Victoria |
| A study of the motivations, impacts and benefits of heritage volunteering in Victoria |
| **Heritage and the environment** | **The role of cultural heritage in addressing climate change in Australia**  How can conserving cultural heritage (including existing buildings and landscapes) contribute to addressing climate breakdown? How can we best reconcile environmental and cultural outcomes? | Heritage and resilience – how can heritage practices contribute to recovery and resilience? | Understanding the barriers and opportunities to maximise the contribution of retrofitting existing buildings to reducing carbon emissions |
| The role of cultural heritage in the circular economy, including waste |
| How can traditional knowledge, including building craft skills, avoid maladaptation & contribute to the green economy? | Topics omitted from this study e.g. the role of caring for cultural heritage in biodiversity & ecosystem resilience in Victoria. |
| **Heritage and the economy (including economic issues in planning)** | **A culture and heritage capital model for Australia**  Should we develop a Culture and Heritage capital model for Australia that enables us to consistently monetise heritage assets and the services they provide?  What are the strengths and weaknesses of such an approach and what can we learn from the environmental sector in Australia?  What can we learn from the current work lead by DCMS in England? | What is the Total Economic Value (TEV) of the heritage sector in Australia – including environmental, tourism and other contributions? | Targeted property price studies relating to commercial businesses, area-based approaches and the impact of neighbouring development on heritage property prices for Victoria. |
| Mapping the sector as a whole across ABS domains to capture the scale and impact. | Modelling the long-term benefit of conserving a Victorian object or site using a triple bottom line approach such as the PlaceEconomics Calgary approach. |
| Understanding the disincentives for conserving heritage e.g. taxation, accounting, building codes and more | Economic modelling tools for heritage decisions in Victoria e.g. reasonable or economic use or the social /economic impact of a planning amendment (Heritage Overlay). |
| Maintaining consistent trend data on attitudes to heritage in Australia using economic methodologies (eg the Allen Consulting questions). | Understanding the perspectives of commercial businesses and owners including creative businesses in Victoria |
| **Creating a stronger policy research environment for cultural heritage** | **Evidence-based policy research for heritage**  A dialogue with scholars in cultural economics, heritage studies, environmental studies and other related disciplines about how we can collaborate to build a stronger evidence base for the wider impacts of cultural heritage on society, the economy and the environment. | A heritage observatory that gathers regular data on heritage assets and activities and finds and shares new evidence for the impact of caring for heritage, sharing data between States and Territories. | Periodically review and update the Victorian heritage stocktake including both activities and assets (or introduce more comprehensive state of the environment reporting on cultural heritage for Victoria.) |
| An initial research agenda for evidence-based policy research in cultural heritage, focussing on the role of heritage in the most pressing public sector policy issues. |

Figure 5: Summary of heritage policy research gaps identified in this report.

## ­­­List of case studies by theme

Each chapter is illustrated with case studies providing examples of Victorian heritage activities or heritage assets that are delivering some of these impacts. The case studies are summarised in the following table.

|  |  |  |  |
| --- | --- | --- | --- |
| **Theme** | **Topic** | **Victorian examples** | **Page** |
| Heritage and society | Learning | National Trust of Australia (Victoria) learning opportunities | 38 |
| Parks Victoria learning opportunities | 38 |
| Museums Victoria learning activities | 38 |
| Physical and mental health | Rail trails | 42 |
| Aboriginal meeting places | 41 |
| Cultural equity | Bonegilla migrant camp | 44 |
| Islamic Museum of Australia | 45 |
| Social capital | Genealogy societies in Victoria | 47 |
| Hands on heritage | 47 |
| Heritage and the environment | Decarbonisation and retrofitting | 1200 Buildings | 52 |
| Traditional building technology | Parliament House | 59 |
| Circular economy | Goods Shed No.5 | 62 |
| Heritage and place | Distinctiveness | The competitive advantage of Ballarat | 65 |
| Regeneration | Evaluation of the former Living Heritage Programme | 67 |
| Place attachment and loss | Migrant heritage project | 68 |
| Strathewen after the fires | 70 |
| Heritage and the arts | Storytelling | Melbourne’s buried blocks | 74 |
| Creativity | Award-winning architecture inspired by cultural heritage | 75 |
| The voices of artists inspired by cultural heritage | 76 |
| Creative industries | Abbotsford Convent | 78 |
| Collingwood Yards | 78 |
| Royal Exhibition Building | 77 |
| Heritage and prosperity | Economic value of the sector | SGS Report on the economic value of heritage 2018 | 83 |
| Property sale prices | HM Prison Pentridge | 87 |
| Tourism | 2008 heritage tourism snapshot for Victoria | 92 |
| Puffing Billy | 97 |

Figure 6 Victorian case studies used to illustrate themes and topics.

# **MAIN REPORT**

# Introduction

This report synthesises evidence for the social, environmental and economic impacts of caring for, and engaging with, cultural heritage. This introduction explains the background to the report and the approach.

The objectives for the report were to:

* collate authoritative and relevant facts ad data from existing research in Australia and overseas that demonstrate the economic and social value of heritage to the community, and
* to understand where the gaps are in the primary research on economic and social value of heritage to the community.

The project was commissioned by the Heritage Council of Victoria (HCV) (RFQ PR220501) who asked that it not involve new primary research but should collate information from existing studies in a non-technical way that can be used in communication, taking a broad approach to cultural heritage and showing how evidence from research applies in a Victorian context, especially where Victorian research is not available.

This is not a systematic meta-review. Instead, our approach has been to select findings that might be useful to HCV in understanding the wider impact and benefits of heritage. We are heritage specialists, not economists, scientists or public health specialists and so not qualified to comment on the robustness of the research or the methodologies in any of the studies and can only highlight the range of research across different disciplines.

Where possible we have sourced empirical evidence using social, economic or scientific research methods. That includes published academic research, public policy research and evaluation (often in ‘grey’ literature). We have given priority to Victorian or Australian studies but there are significant gaps, particularly around social impact research.

In compiling this report, we have been particularly inspired by Indigenous scholars and policymakers who have led the way in embedding cultural heritage in wider public policy in Australia. We have also included published data on Aboriginal Cultural Heritage (ACH) in the stocktake as this is foundational to all heritage in Australia. As this was just a literature review, we have not consulted with Aboriginal (or other community) groups, but that should be a priority in any future work, in line with the principles in Dhawura Ngilan (the vision for Aboriginal and Torres Strait Islander heritage in Australia and the best practice standards in Indigenous cultural heritage management and legislation([[17]](#footnote-18) and Our Knowledge, Our Way (the guide to Indigenous-led approaches to strengthening and sharing their knowledge for land and sea management).[[18]](#footnote-19)

Research into the economic, environmental and social impacts of heritage cuts across many different disciplines, from economics to psychology and the sciences. The field has grown exponentially over the past two decades to a scale where we are now beginning to move from literature reviews to more systematic meta-reviews.

In terms of the international literature, we have mainly used studies from England or the UK. This pragmatic decision was based on three factors:

* so many economic, social and environmental impact studies for heritage have now been synthesised by either Department for Digital, Culture, Media and Sport (DCMS) or Historic England (literature reviews and systematic meta-analyses) that is both easier to find and more robust,
* the UK is an acknowledged leader in social impact research for heritage (a significant gap for Australia), and
* having worked in the field in both England and Wales, the lead author is familiar with many of the sources.

Whilst we have drawn on some easily accessible work from the US, we are very conscious of the limitations of this study. Annex 4 identifies some of the recent literature reviews and meta-analyses, and Annex 5 identifies web resources that provide access to more studies.

Although the report takes a broad view of heritage, most of the cited studies relate to built heritage. We have not included natural heritage, and only briefly referred to some of the research around heritage in the museums sector. We have noted findings from research with Aboriginal communities that have wider relevance but have not reviewed wider evidence for Aboriginal cultural heritage.

One of our first challenges was how best present such a wide body of diverse research. The list of social, economic and environmental impacts of heritage is potentially very wide, and most of those topics overlap. For example, the conservation of individual sites such as Abbotsford Convent, can deliver multiple economic, social, creative and environmental impacts. Again, we have made a pragmatic decision. To provide a report that is useful to HCV, and has a point of difference from previous reviews, we have selected five public policy themes where heritage can best make a difference, but that contribution is not always obvious. The five main topics are society, the environment, planning, the arts, and prosperity.

Within each theme we have grouped the evidence into topics that again reflect identified policy priorities for the Victorian Government. For example, under Heritage and Society we have identified learning, health, cultural equity and social capital as being of relevance in Victoria. In doing so, we found that individual research studies did not fit neatly under one topic – for example research into the contribution of heritage to creative industries could sit under prosperity, placemaking or the arts. Where possible we have highlighted **headline results** that might be useful to HCV.

We have illustrated each chapter with case studies – examples of Victorian heritage activities or heritage assets that are delivering some of these impacts.

A key requirement of the project brief was to identify gaps in the research. As the list is potentially vast, we have identified topics of most relevance to HCV’s current policy challenges and some long-term research directions.

The heritage stocktake includes both heritage activities and assets, as the social, environmental, and economic impacts of heritage arise not so much from the assets themselves, but how we engage with them. In doing so it attempts to provide an overview of a fragmented sector that shares a common goal of caring for what is important to people. It illustrates the diversity of heritage in Victoria, the sheer scale of the sector including the many different community organisations. It also identifies varied sources of funding across government and the private sector.

Data about Australian attitudes to heritage is not included in the main report as it is about how people view cultural heritage, rather than social or economic outcomes of heritage interventions. It is, however, relevant to understanding social attitudes. As this research has previously been summarised elsewhere[[19]](#footnote-20), Annex 4 notes the main studies (including more recent work) and some findings.

Finally, this report has drawn on Indigenous-led research around the links between culture, heritage, society and the world around us, as a contribution to decolonising heritage practice. In areas such as health and environmental policy, Aboriginal researchers have been at the forefront of exploring the importance of cultural heritage in social and environmental outcomes which is of relevance to all heritage practice.

This report is structured as follows:

The **Overview** includes an executive summary, a list of ten heritage myths and a table summarising the research gaps.

For the **main report**, the Introduction sets out the approach to the report including the scope, limitations and choice of themes and topics.

Chapter 1 focuses on the theme of heritage and society through the topics of participation, learning, health, diversity, equality and social capital.

Chapter 2 is about heritage in environmental policy, including climate change, embodied energy, retrofitting, the circular economy and traditional knowledge.

Chapter 3 is about heritage in planning and placemaking, including its role in distinctiveness, regeneration and place attachment.

Chapter 4 is about heritage and the arts covering storytelling, creativity and the creative industries.

Chapter 5 covers the contribution of heritage to economic prosperity including the bigger economic role of the sector, listing and in property values, heritage and tourism and jobs in the sector.

Chapter 6 explores gaps in the evidence including short term priorities for Victoria and some issues that may be better addressed in collaboration with other state agencies. It also identifies four longer term strategic cultural heritage policy research areas around climate change, culture and heritage capital, wellbeing and Indigenous knowledge.

Annex 1 is a stocktake of heritage activities and Annex 2 a stocktake of heritage assets in Victoria. Annex 3 summarises evidence for attitudes to heritage. Annex 4 is an annotated bibliography of literature reviews and selected primary research studies for Victoria and Australia. Annex 5 identifies useful national and international websites and resources for sourcing additional cultural heritage data and research.

# Impact, significance or value?

***This section briefly explains the approach to questions of value used in this report. There is also a separate glossary of terms used in the report.***

This report generally talks about the social, environmental or economic ‘impact’ of caring for (or engaging with) cultural heritage. This is because the focus is on empirical evidence for the difference heritage can make to other wider policy outcomes.

The term ‘impact’ is chosen to distinguish this from the term ‘cultural significance’ used in heritage protection. The choice of the term ‘impact’ also distinguishes empirical research into the **difference** that heritage make to other policy outcomes from research that expresses social, environmental economic and cultural values that people hold for things in dollar terms.

The term ‘impact’ (rather than value or benefit) also recognises that caring for or engaging with cultural heritage may not always deliver positive benefits – there can be disbenefits.

The background to this is that questions of value are central to cultural heritage practice. Heritage is often defined in terms of what people value and want to hand on to the future. When heritage is formally protected under state, federal or other legislation, those decisions are based on concepts of value. There are two components to heritage significance - firstly the different types of cultural value (including social, architectural, evidential or other values) and secondly thresholds or degrees of significance (which can range from the personal, through to local, state federal and international). Greater degrees of significance justify higher levels of protection.

However, there are other concepts of value that are important in heritage practice. Caring for heritage can often result in wider environmental, social or economic outcomes – for example by reducing waste or improving health. This is sometimes described as the instrumental values or benefits of heritage.

A third kind of values are own individual and institutional values that shape heritage practice, such as ethical values, approaches to inclusion and equality, or issues such as trust, accountability or fairness.

Whilst all three types of value are important in heritage practice, the focus of this report is on the ‘instrumental’ values of heritage – the contribution that caring for heritage can make to wider social, environmental or economic policy outcomes.

**‘INTRINSIC’ VALUES**

**The many different cultural meanings that people attribute to heritage**

**(significance)**

**INDIVIDUAL & INSTISTITUTIONAL VALUES**

**INSTRUMENTAL VALUES**

**The wider social, economic and environmental impacts that flow from engaging with or investing in heritage**

**(sustainability)**

values in heritage practice

**Our institutional and professional values (trust, accountability, transparency, ethics) and our own personal biases**

**(service)**

Figure 7 Three kinds of values in heritage practice

Diagram

Description automatically generatedThe discipline of economics is also founded on concepts of value. Economists classify values into use and non-use values. Non-use values are often captured through econometric research techniques such as assessing ‘willingness to pay’. Econometric research techniques can be used to express a wide range of different values that people hold for things in monetary terms, including social, economic, environmental and cultural values.

Figure 8 Use and non-use values in economics

The difference between significance, impact and value (in the economic sense) can be illustrated through the example of ‘social’ value.

Social significance is used in listing or registration.  It is a criteria that says one thing is more important than another for social reasons.

Social impact is about the **difference** that engaging with heritage or protecting heritage can make. For example, creating an album of family photographs can bring people together, or regenerating run-down buildings can create places for more social events. Caring for heritage can also have negative social impacts for example if people feel excluded from heritage activities, this might affect their confidence of self-esteem.

The term social value is used by economists when they are talking about willingness to pay to value outcomes for others over their own.  So in previous reports for the Heritage Council of Victoria, SGS Planning & Environment have talked about social value in those terms.  This is because econometric research methods can be used to express social, economic and environmental values - and even cultural values - in dollar terms!

# Glossary

This glossary lists other definitions of terms as they are used in this report. There is a separate list of abbreviations.

**Appraisal** – the process of assessing the costs, benefits and risks of alternative ways to meet government objectives. It helps decision makers to understand the potential effects, trade off and overall impact of options by providing an objective evidence base for decision making.

**Benefit-cost ratio (BCR)** – a process that uses dollar values to capture the social, economic or environmental benefits of a project. Some impacts are adequately covered by benefit-cost analysis but others are not.

**Caring for heritage** – this report uses the term ‘caring’ to refer to all the things that we do to hand on heritage to future generations including conservation (see below) and engagement (such as using heritage, storytelling, interpretation or enjoying cultural heritage)

**Conservation** – conservation is one aspect of caring for heritage. Heritage conservation involves action to prolong the life of cultural heritage assets. This can include caring for buildings, landscapes, sites and objects. It is also possible to ‘conserve’ (in the sense of prolong the life of) intangible heritage such as language, ideas, skills and traditional knowledge.

**Cultural and heritage capital accounting** – as system of accounting used to attribute dollar values to heritage assets to enable them to be considered in investment decisions. The UK has been pioneering a cultural and heritage capital accounting model, in line with similar models used environmental accounting (‘natural capital’).

**Cultural economics** – the branch of economics that looks at the relationship between culture and economic outcomes. Cultural economists such as Professor David Throsby use economic analysis to explore issues such as how much people are willing to pay to protect heritage.

**Cultural significance** –generally refers to thecultural values people attribute to heritage that are used in designation, including social, historic, aesthetic and evidential (or story telling) significance However there are wider cultural impacts that can arise from engaging with heritage such as the role of heritage in identity or creativity, that are not necessarily considered in designation.

**Designation** – used here as a general term for the formal protection of heritage places or objects through, for example, listing or inclusion in a heritage overlay. The term can also refer to protected areas. In the UK designation is also relevant to designated collections. World heritage inscription is another form of designation. Designation can occur under federal or state legislation, or under international conventions or treaties.

**Difference in difference** – a statistical technique that has been applied to property price studies to compare the price of heritage assets before and after designation.

**Economic use** – alternatively, the Executive Director may consider the extent to which **economic use** may be affected by refusal. The economic use is concerned with the economic functioning of the place or object and not on the financial circumstances of the applicant or owner.

**Economically sustainable use** – the Executive Director may consider whether the proposed works would facilitate **economically sustainable use**, defined as one which can continue for the medium to long term, mitigating the possibility of continual proposed changes to the place or object. If the permit applicant contends that future economic use would be affected by refusal, they may be required to provide relevant information to support the contention, which may include evidence of forecasted impact and modelling.

**Ecosystem services** – the contribution that ecosystems can make to human wellbeing and impact on quality of life. These are often grouped into provisioning, regulating, cultural and supporting services. DCCEEW has been exploring the application of these models in Australia.

**Evaluation** – the systematic assessment of the design, implementation, and outcomes of an intervention, to understand its effects and what can be improved. It is an opportunity to look back at what difference the programme or project made, and what lessons might be learned for the future and hopefully to provide peer-to-peer advice to others. Information from evaluation reports also help us to refine our grants processes for the future.

**Evidence-based policy making –** this approach is based on the idea that policy development should be grounded in the best available evidence, noting that in practice there are often many other political and operational factors to consider. For cultural heritage, evidence-based policy making involves background research, policy evaluation, systematic data collection, future forecasting and other techniques.

**Existence values** – used in economics to capture the benefit people receive from knowing that something exists even if they never visit or use it. For example, people may value a local church that they don’t necessarily visit. The concept is often used in econometric studies of heritage protection.

**Grey literature** – information produced by government, industry, academics and others that is published informal or non-commercially that has not been peer-reviewed. It can be difficult to locate. Much of the research cited in this report can ben considered to be grey literature.

**Hedonic price modelling** – a statistical technique that uses multiple variables to explore property prices. It has been used to compare the prices of heritage listed properties with unlisted properties, whilst controlling for other variables.

**Heritage** – this report takes a broad view of heritage, defining it as what is worth keeping. This can include natural and cultural heritage, tangible and intangible heritage, and Indigenous and ‘historic’ heritage, whether designated or not.

**Heritage assets** – used as a generic term for both tangible and intangible heritage items or resources. This can include natural and cultural heritage, tangible and intangible heritage, and Indigenous and ‘historic’ heritage. Not all heritage assets are formally protected.

**Heritage activism** – taking action to protect a local (or any other) cultural heritage place or item from damaging change or becoming derelict or disused.

**Heritage activities** – the different ways that people engage with cultural heritage. This includes involvement, enjoyment and learning. It also includes owning or using cultural heritage assets and cultural heritage practices such as cultural burning or traditional skills.

**Heritage ‘ecosystem’** – the set of processes and interactions whereby heritage assets and investment not only deliver direct and indirect impacts but also generate numerous spill overs which further enhance the cumulative and total impact of those assets and investments.

**Heritage services** – can be defined as services that enable others to enjoy and participate in cultural heritage, including identification, protection, funding, management, interpretation, access, day to day care and maintenance, research and investigation. The term is also used in cultural capital accounting to describe the services provided by cultural heritage assets.

**Heritage workforce** – people whose paid or unpaid work involves enabling others to care for or enjoy cultural heritage.

**Historic heritage** – used in Australia to distinguish cultural heritage assets dating from after the late 18th century. Also described as non-Indigenous, post-contact or settler heritage.

**Intangible cultural heritage** – cultural heritage assets that do not have a physical dimension such as language, performance, skills, knowledge, traditions, or memories (although it may be captured in written records, recordings or photographs).

**Life cycle assessment** – a technique that comprehensively analyses the environmental performance of a building, taking into consideration cradle to grave impacts.

**Listed heritage asset** – general term for heritage sites or buildings that have been formally designated or protected either under heritage legislation or planning legislation.

**Mitigation** – where cultural heritage is damaged or destroyed to facilitate new development, mining, agriculture or other activities, the relevant State or Federal legislation may allow for action to ‘mitigate’ that destruction, such as archaeological excavation, investigation, recording or digitisation. The social, economic or environmental benefit of recording or digitisation will be very different to the impact of retaining the asset.

**Natural Capital accounting –** the process of establishing the stocks and flows of natural resources, either in physical or monetary terms. It is used to give greater weight to natural resources and ecosystems in accounting and public policy.

**Non-use values** – a value that arises from the existence of something even if it is not used. Non-use values can include option values (people value something because they might want to use it in the future); bequest values (people are willing to pay for something now because they feel it will benefit future generations) and existence values (see above).

**Reasonable or economic use** – the Heritage Act 2017 requires that in determining heritage applications, the Executive Director must, consider the extent to which the application if refused, would affect the reasonable or economic use of the registered place or object. Heritage Victoria has published guidance on Reasonable or Economic Use (HCV 2021).[[20]](#footnote-21) The Executive Director may consider the

‘historic, recent and current uses of the registered place or object, other compatible uses of the registered place or object, the context and setting within which the place or object is located, and other relevant matters.’

**Place** – this report uses place in its widest sense to refer to places in the land use planning system. Note that Victorian heritage legislation defines heritage ‘places’ as archaeological sites, land, buildings, landscapes, precincts, shipwrecks, trees or land.

**Place attachment –** the emotional bond between people and places – with a focus on what makes places meaningful. Used in environmental psychology.

**Policy research –** used in this report to refer to research that can help inform the development of policy for cultural heritage or to explore the contribution of heritage to other policy agendas.

**Productivity** – is the rate at which an economic system transforms work into the output of goods and services. There is little evidence for the direct contribution of heritage to productivity but some research in the UK that tracks the role of historic buildings in the performance of creative industries.

**Public value** – the value created by government through services, laws, regulation and other actions. Mark H. Moore’s two books, Creating Public Value and Recognising Public Value provide a useful starting point.[[21]](#footnote-22)

**Registration** – the specific term used in Victoria (and other Australian states) to refer to the formal protection of heritage places and objects under the Heritage Act. Also known as listing or designation (in the UK) or heritage protection more generally or inscription (for World Heritage sites).

**Significance** – use in heritage practice to determine whether something merits registration or formal protection. Incorporates both different types of value and also ‘thresholds’ or degrees of significance’. The types of value used in designation are normally cultural values, and can include social, aesthetic, evidential (or story telling), spiritual or historical values. The degrees of significance may be personal, local, regional, state, Federal or international.

**Social capital** – a resource that can facilitate cooperation within and between groups of people, and the key elements contributing to social capital as norms, networks and trust.[[22]](#footnote-23)

**Social impact** – the difference that engaging with cultural heritage can made to individual or collective social outcomes. That impact may be positive or negative.

**Social significance** – a specific criteria used in Victorian heritage legislation as a basis for registration or protection. This is different to the social impact of investing in cultural heritage.

**Social value** – often used in heritage listing to refer to social significance. In economics social value refers to people’s willingness to pay for a benefit delivered to others.

**Sustainable development –** initially defined as the ability of people to meet their own needs without compromising the ability of future generations to do so. The four pillars of sustainability are economic, social, environmental and cultural. Often focussed on environmental issues, it is increasingly encompassing social and cultural goals.

**Tangible cultural heritage** – cultural heritage assets with a physical dimension including landscapes, buildings, sites, objects, collections, technology and more.

**Total economic value (TEV)** – a measure of the economic value of something that includes both use and non-use values. It is used in cost-benefit accounting for the natural environment.

**U Value** – rate at which heat is transferred through a building element such as a wall, door or glass. Low U values mean that the material provides good insulation.

**Wellbeing** – defined by the World Health Organisations as a positive state experienced by individuals and societies, encompassing the quality of life and the ability of people to contribute to the world with a sense of meaning and purpose. Australia published a wellbeing framework in 2023 and there are also initiatives in place in Victoria, including an Aboriginal wellbeing framework.[[23]](#footnote-24)

# List of abbreviations

ABS – Australian Bureau of Statistics

ACH – Aboriginal Cultural Heritage

A&TSI – Aboriginal and Torres Strait Islander

BCR – benefit-cost ratio

COP – United Nations Climate Change Conference of the Parties

DCMS – Department for Culture, Media and Sport (England)

DCCEEW – Department of Climate Change, Energy, Environment and Water (Australia)

HCOANZ – Heritage Chairs and Officials of Australia and New Zealand

EIA – Environmental impact Assessment

GDP – Gross Domestic Product

HCV – Heritage Council of Victoria

HE – Historic England (note that this is separate to English Heritage)

HF – the UK National Lottery Heritage Fund (formerly the Heritage Lottery Fund)

HO – Heritage Overlay

HV – Heritage Victoria

MHC – the former NSW Migration Heritage Centre

NABERS – National Australian Built Environment Rating System

NTV – National Trust of Australia (Victoria)

OKOW – Our Knowledge, Our Way - the guide to Indigenous-led approaches to strengthening and sharing their knowledge for land and sea management

RAP – registered Aboriginal Party

SKM – Sinclair, Knight, Merz (former Australian consulting organisation)

SGS – SGS Economics & Planning (consulting organisation)

SoE – State of the Environment Report (quinquennial report for Australia)

TEV – Total Economic Value

TRA – Tourism Research Australia

UK – United Kingdom – refers to UK-wide research unless specific to England, Scotland, Wales or Northern Ireland. DCMS has some UK-wide responsibilities that are not devolved to the home countries (eg for international heritage issues).

UNESCO – United Nations Educational, Scientific and Cultural Organisation

VAT – Value-added Tax (a UK tax similar to Australian Goods & Services Tax (GST)

VAHC – Victorian Aboriginal Heritage Council

VHR – Victorian Heritage Register

VPS – Visitor Profile & Satisfaction Data

# Chapter 1: Heritage and society

**This chapter explores evidence for the social impacts of investing in cultural heritage assets and activities. This includes impacts on individuals and impacts on communities. It also makes use of case studies and data on participation in heritage activities in Victoria.**

The social impact of culture and heritage can be defined as, ‘the difference that engaging with cultural heritage can make to individual or collective social outcomes’. For example, activities such as volunteering at heritage sites or taking part in educational programs can deliver social benefits.

Note that understanding the social impact of engaging with cultural heritage is different to identifying the social value of heritage sites for the purposes of registration. ‘Social significance’ is attributed to sites when they are protected, but ‘social impacts’ or benefits may arise from heritage activities. That impact can be monetised as ‘social value’.

|  |  |  |
| --- | --- | --- |
| **Social significance**  **(in heritage assessment for Victoria)** | **Social impact** | **Social value**  **(in economics)** |
| Criteria used in heritage protection to determine what makes one site/object more significant than others:  Community  Attachment  Time depth  Resonance[[24]](#footnote-25) | Evidence for the difference investing in heritage assets/activities can make to social outcomes, eg:  Physical health and/or mental health  Skills and learning  Mental stimulation  Identity and cohesion  Confidence and safety  Enjoyment  Belonging and inclusion  Social networks and connections  Empowering younger audiences  Empathy for, and understanding of, others  Civic engagement | People’s willingness to pay for the welfare of others in relation to their own (eg a better degree of heritage conservation or any other social benefit) |

Figure 9: social significance, impact and value

Engaging with cultural heritage can potentially have a huge range of different social impacts. In their review of Heritage Victoria Grants, SKM suggested that heritage conservation projects created a sense of community pride, that the reuse of heritage places had enhanced community cohesion and that investing in heritage brought together from people of different backgrounds for shared purpose.[[25]](#footnote-26) They also noted that grants could deliver enhanced community identity, celebrate cultural diversity and participation, and create opportunities for current and future generations of Victorians to appreciate, understand and learn from Victoria’s history.[[26]](#footnote-27)

There is no standard approach to understanding the social impact of heritage. Matarasso identified 50 different potential outcomes for engaging with the arts and culture, including better physical and mental health, learning and skills, identity, confidence, enjoyment, social networks, respect for others and civic engagement[[27]](#footnote-28), whilst a recent review of research on the social impact of cultural heritage found 180 indicators for heritage and wellbeing.[[28]](#footnote-29) Historic England grouped hundreds of research studies on social impact under 13 different themes, whilst Fujiwara et al looked at the social outcomes of heritage through four themes – health, education, employment and civic participation.[[29]](#footnote-30)

Of the many potential social impacts for cultural heritage, this report picks out five –participation, learning, in health, cultural equity and in social capital. The five topics have been chosen because they relate to five important social policy drivers in Victoria – education policy, health policy, multiculturalism and equality. The Victorian government has also identified social capital as an important issue that can be affected by different policy areas.

As there are often strong overlaps between social and place-based, economic and creative impacts, social impacts are also covered in Chapter 4 (heritage in planning) and Chapter 5 (heritage in creativity). The much bigger issue of heritage and wellbeing is one of the future strategic research challenges in the Epilogue.

**Key studies and literature reviews**

Whilst there are very few studies of how investing in cultural heritage can make a difference to social outcomes for Australia, there are many more for the UK.[[30]](#footnote-31)

Annex 4 notes some of the major studies on the social value of heritage, and Annex 5 lists useful websites and resources. The Historic England ‘Heritage and Society’ summarises a wide range of social impacts for heritage, from holistic issues such as wellbeing to more targeted topics such as heritage and learning, heritage and social capital, place attachment, civic engagement, and many different forms of equity.[[31]](#footnote-32) The most recent systematic study was an international scoping review of research into the impact of heritage interventions on wellbeing including heritage activities in museums, hospital and healthcare settings, volunteering, community archaeology and living in heritage environments.[[32]](#footnote-33) DCMS have also undertaken a review of quantifying and valuing the wellbeing impacts of culture and sport.[[33]](#footnote-34)

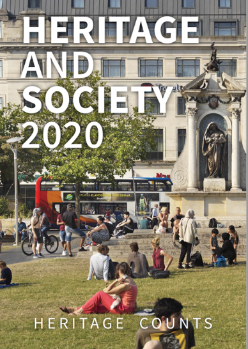


Figure 10 Heritage and Society 2020, Historic England

For Australia there have been studies on how Australians perceive the social value of heritage (see Annex 4). The 2006 Deakin study included questions about the social value of heritage including its role in learning diversity; the 2005 Allen Group study considered how engaging with heritage helps build social capital including community stability and cohesion, aesthetic appreciation, spiritual and symbolic connections, vibrant local culture, a ‘sense of place’.[[34]](#footnote-35) The 2014 review of community perceptions of heritage in Victoria included information about people’s perceptions of the social benefits of cultural heritage activities, and Parks Victoria visitor and community research includes perceptions social outcomes of investing in parks.[[35]](#footnote-36)

These studies do not demonstrate a causal relationship between investing in cultural heritage assets or activities and differential social impacts, but there is some research from other disciplines around culture and social outcomes. Research in Indigenous health shows correlations between culture and wider health and social outcomes, or public health research into for example the role of urban environments and health.[[36]](#footnote-37)

## Participation in heritage

***This section highlights some of the data on Australian participation in heritage as a starting point for thinking about the social benefits of heritage.***

People derive potential social benefits from participating in cultural heritage. They may participate through ***actively caring for*** tangible and intangible heritage assets (e.g. as owners or traditional knowledge holders), or through ***enjoying*** heritage, for example by visiting parks, museums or heritage sites, attending ceremonies, heritage festivals, public programs or digital heritage content. Living, working or visiting historic places is also a way that people experience heritage.

As Annex 1 notes, there is no overview of heritage participation in Victoria, and where there is data, Covid-19 has had a significant impact. But for example, Museums Victoria reports 1.2million ticketed visitors and a total of 9 million visitors including the Royal Exhibition Building, and online attendance.[[37]](#footnote-38) Prior to Covid-19, around 130.8 million people visited parks and piers in Victoria in 2018-19.[[38]](#footnote-39) 75% of people in Victoria had visited a park, a figure that had remained stable since around 2002.[[39]](#footnote-40) The technological heritage sector estimates that across Australia, there are around 3.5 million paid visitors to technological sites and attractions. At the 2011 Melbourne Open House Day, over 100,000 people visited 75 open properties (with 79956 in 2022).[[40]](#footnote-41)

Some idea of Australia-wide levels of participation can also be gained from surveys. For example, the 2010 Deakin study found that in the past 12 months:

* 80% of people had engaged in at least one heritage related behaviour,
* 60% had watched a TV show related to Australia’s heritage,
* 47% had visited an Australian heritage site and 41% had attended a festival or event,
* 40% had read a book or article related to Australian heritage,
* 25% had donated money to a heritage related cause, and
* 10% had played an active role in heritage protection.

These figures had declined since 2006 but there has been little research into how and why those figures have changed.[[41]](#footnote-42)

## Heritage and learning

***This section highlights some of the learning opportunities that arise from engaging with heritage in Victoria and notes the role of the heritage sector as a provider of knowledge.***

One of the most obvious measures is the role that cultural heritage activities can play in learning. This can include a wide range of learning outcomes for people of all ages from young people to older people who might benefit from mental stimulation and engagement.

One of the biggest research challenges is demonstrating a causal link between attending cultural heritage events and activities and learning outcomes. The DCMS Case Project reviewed evidence for the learning outcomes of taking part in museums and heritage projects. Eleven systematic American or UK studies measured learning outcomes for museums and heritage. One found that visiting a museum or gallery resulted in higher test scores and another indicated the opposite effect, but both studies were of low quality and had significant limitations. Although direct learning outcomes were difficult to demonstrate, other studies showed that engaging with museums and heritage contributed to confidence and that there were overwhelmingly positive ratings for the visits.[[42]](#footnote-43)

Nevertheless, Australians are very clear about the role of learning as a reason to protect cultural heritage. Education was one of the main reasons that Australians used to justify their interest in heritage and 97% of Australians consider heritage education to be ‘very important’ whilst 85% of parents believe that visits to museums should be part of the national curriculum.[[43]](#footnote-44)

Each year some 1.35 million students visit national Australian museums to study history, biology, physics and chemistry, English, civics, arts, geography, languages and mathematics and many other subjects directed at all stages of the school curriculum as well as tertiary audiences. Cultural institutions are also moving into life-long learning – the formal and informal ways in which we develop new knowledge throughout life through programs for older and younger audiences.

The **National Trust of Australia (Victoria)** offers physical and virtual learning opportunities based on their heritage properties and collections. There are facilitated learning programmes at Old Melbourne Gaol, the Polly Woodside Tall Ship, Rippon Lea Estate, Como House and the McCrae Homestead. These immersive learning experience cover different curriculum elements from maths and geography to the humanities. The school programs meet National and Victorian curriculum standards. There are also programs for adult, tertiary and ESL groups.[[44]](#footnote-45)

**Parks Victoria** also offer a wide range of interpretation and education programs. In 2017-8 (pre Covid-19) over 114,000 participants were involved in interpretation and education programs, including 30,000 participants in education programs and 12,500 Junior ranger participants.[[45]](#footnote-46) The service has taken on community engagement rangers which have increased the number of participants.

**Museums Victoria** offer virtual learning programs, museum at home learning, online resources and tools. These include programs funded by the Department of Education that are free to all Government schools.[[46]](#footnote-47) History Lab for example uses the migration and diversity collections to explore how ordinary objects tell big stories, linked to both the history element of the curriculum and to creative and critical thinking topics.[[47]](#footnote-48) A travelling ‘museum in a van’ and kit loan service includes Reminiscing Kits to explore heritage topics such as rock and roll, sporting programs, recipes, sewing and migration journeys.[[48]](#footnote-49) The Corporate Education Program offers a First People’s Cultural Competency programme, designed to help shape how we think about and interact with the history and culture of First Peoples’ and can integrate it into our working relationships and meaningful interactions.[[49]](#footnote-50)

Cultural heritage organisations also contribute to learning through delivering important research, often in partnership with others in the public and private sector. In 2008-09 there were over 500 research projects underway in Australia’s major museums, and museums participated in 267 grant funded research projects.[[50]](#footnote-51) For example, in 2022 Museums Victoria established a Research Institute to create a multi-disciplinary, collaborative research programme built around four centres of knowledge around four heritage topics - First Peoples’ Knowledge, healing Country and wellbeing, discovery and innovation, and collection care and preservation.[[51]](#footnote-52)

A significant amount of research and new knowledge is delivered through the various systems of heritage approvals. For example, one of the ways of mitigating loss to archaeological heritage sites from development is through archaeological reports. Research into both First Nations and other cultural heritage is generated through compliance reporting in these approvals systems.

## Heritage and health

***This section notes examples of international research into the link between heritage and health and important work being done by Indigenous researchers. It highlights examples of Victorian heritage initiatives such as Rail Trails that can deliver health benefits.***

Our physical and mental health is not simply a biomechanical construct, but something intimately connected with our social and physical context – where we live, who we know and interact with, the relationships we seek to build and our cultural links and connections.

There is also wider evidence about the role of our physical environment, including access to green spaces such as parks and blue spaces such as waterways, in mental health and wellbeing. For example, international research studies show how engaging with parks, forests, views and simply being outdoors can contribute health benefits.[[52]](#footnote-53)

In the UK, **Operation Nightingale** has shown how engaging with archaeology and excavations can improve mental health of former soldiers. [[53]](#footnote-54) Operation Nightingale is a programme of hands-on conservation with veterans and people with post-traumatic stress disorder lead by Wessex Archaeology. One of the few heritage projects to be systematically evaluated, the research showed that the mental health impacts of taking part in the project included reductions in anxiety, depression and feelings of isolation, and a greater sense of being valued.[[54]](#footnote-55)

There is a growing interest in the social and cultural determinants of health. ‘Culture, Diversity and Health in Australia’ is a core text that helps health care providers understand the role of culture and cultural safety in health practice.[[55]](#footnote-56) It notes that although health is shaped by social, economic and environmental forces, there are also cultural elements that shape health that can lead to different health outcomes for some groups.

The State of Victoria’s Aboriginal Cultural Heritage Report 2016-21 reports on the role of cultural practice, health and wellbeing through the voice of Dr Doris Paton, a proud Gunai and Monaro Ngarigo woman, and teacher, academic and language educator.[[56]](#footnote-57)

Much of the Australian thinking about the link between cultural heritage and health has been led by Aboriginal leaders and researchers. The Lowitja Institute notes that culture and a strong connection to, and identification with, one’s culture can improve resilience. A 2014 roundtable of distinguished Aboriginal and Torres Strait Islander leaders explored the role of culture in Aboriginal and Torres Strait Islander health.[[57]](#footnote-58) The background report notes key cultural determinants of health as:

* connection to, custodianship, and utilisation of Country and traditional lands,
* reclamation, revitalisation, preservation and promotion of language and cultural practices,
* protection and promotion of Traditional Knowledge and Indigenous Intellectual Property, and
* understanding of lore, law and traditional roles and responsibilities.

Each of these could be described as cultural heritage practices. The direct link between culture and health for Aboriginal communities is embedded in the definition of Aboriginal health as, ‘not just the physical wellbeing of the individual but the social, emotional, and cultural wellbeing of the whole community.’[[58]](#footnote-59) The Roundtable report notes that culture is integral to strong and healthy identity formation, and a strong contributor to better health outcomes, but culture is not being practiced and transmitted as much as we would like. It notes the tension between the positive opportunities of culture in terms of values and meanings, and the negative impacts of colonisation.[[59]](#footnote-60)

Connecting with culture and heritage can have mental health benefits including resilience, confidence and overcoming trauma. The landmark ‘Elders Report into Preventing Indigenous Self-Harm and Youth Suicide’, for example, has emphasised the all-encompassing connection between culture, health, healing and resilience for Australian Indigenous people.[[60]](#footnote-61)

A recent study showed how **Aboriginal gathering places** in Victoria link cultural heritage and health. Each Aboriginal gathering place has its own unique history and stories. A study of the role of 13 Aboriginal gathering places (also known as healing places or community centres) in Victoria in delivering health outcomes found that creating a safe place to learn about culture and Country contributed to health outcomes.[[61]](#footnote-62)

Engaging with cultural heritage can also help people who have experienced trauma such as Veterans. The **Australian National Veterans Arts Museum** in Melbourne enhances and strengthens the wellbeing of the veteran community through arts engagement programs, project and collaborations. The Charity is planning to transform the Commonwealth heritage listed former Art Deco Modernist Veterans Clinic into an inclusive National Cultural Institute and home of Veterans arts.[[62]](#footnote-63)

A study of adolescents in Melbourne found that **urban parks** can support positive mental wellbeing through sensory, social, physical and spiritual experiences.[[63]](#footnote-64) A survey of 4,141 Australian urban dwellers found that population density and urban parkland were positively associated with cognitive function. They argued that denser urban environments and more parkland provided opportunities to engage in more activities. [[64]](#footnote-65) The implication of this research for heritage might be that dense historic neighbourhoods, such as inner-city terraces, could have a role in supporting mental wellbeing.

Covid-19 prevented many people from engaging with cultural heritage or visiting cultural heritage sites. The loss of access to culture and heritage has shown how important it can be. An English research study showed that when people were deprived of access to heritage sites in 2020, they became more aware of the impact of cultural heritage, in particular the benefits to health and wellbeing.[[65]](#footnote-66)

In terms of physical health***,*** activities such as visiting outdoor cultural heritage places including parks and landscapes can deliver physical benefits. Indeed, physical exercise is one of the key motivations for visiting metropolitan and rural parks; Parks Victoria report that more than half of all visits to Victorian metropolitan and national/state parks are for physical or sporting purposes.[[66]](#footnote-67)

Other opportunities for engaging with cultural heritage that provide physical exercise include walks and trails, and activities such as taking part in archaeological excavations.

**Rail Trails** are examples of cultural heritage assets in the form of old railways lines, bridges and stations being repurposed to provide opportunities for physical activities such as walking and cycling. The Rail Trails Australia website lists 48 rail trails for Victoria, from the 134km Great Victorian Rail trail to smaller local trails of 1-2 km. They have published a guidebook to Rail Trails of Victoria.[[67]](#footnote-68) Rail Trails Australia has worked with Bicycle NSW and Rail Trails NSW to provide a video documenting the local economic benefits of rail trails.[[68]](#footnote-69)

The 40km Lilydale to Warburton Rail Trail for example, attracts over 200,000 visitors including walkers and cyclists each year. The trail recently received funding from Regional Development Australia to provide facilities for the local community to gather socially, for relaxation and recreation.

In a formal evaluation of the impact of rail trails on physical activities, Merom et al tracked the impact of a campaign to promote a newly constructed rail trail in Western Sydney. They found that local cyclists were more likely to use the trail, but more work needed to be done to increase usage amongst walkers.[[69]](#footnote-70)

## Heritage and cultural equity

***This section notes Australians’ views on heritage and diversity, and provides some examples of heritage initiatives in Victoria designed to contribute to cultural equity***

Museums and cultural heritage play an important role in helping to support a more culturally diverse society. Pioneering British sociologist Stuart Hall stated that, ‘Heritage is a powerful mirror – those who don’t see themselves are therefore excluded’.[[70]](#footnote-71)

Victoria is home to one of the most culturally diverse societies in the world. 30% of Victorians were born overseas – a higher percentage than other states and many people came to Victoria as refugees from conflicts in Europe, Africa, the Middle East and Southeast Asia.[[71]](#footnote-72)

Diversity is an important policy topic in Victoria. For example, cultural equity is a key platform for the Victorian creative industries strategy, which includes developing diversity and inclusion targets and standards, and reviewing the accessibility and inclusiveness of Creative Victoria processes. It also involves developing universal design principles for cultural infrastructure projects.

As noted above, an international review acknowledged that there had been considerable efforts by heritage institutions and actors to target interventions towards minority, disadvantaged and vulnerable groups, including homeless people, people from economically disadvantaged backgrounds, and ethnically diverse groups, children and young people, older people, women and people experiencing physical and mental health issues and disabilities, and that the majority of studies (45) targeted these.[[72]](#footnote-73)

For Australia, there is relatively little primary research into the impact of heritage assets and activities on cultural equity. However, we do know something about the value people place on a more diverse heritage. The 2006 Deakin study found that whilst most people have a bias in terms of what they wish to see protected (i.e. their own culture and history), there was a recognition of the diversity of Australian culture and the right of different groups to preserve components important to them. This illustrated the point that there is no need for heritage to be ‘universal’ – people respected the rights of others to preserve what is important to them so long as it did not interfere with their own ability to do the same. Australians also acknowledged that heritage is not just about white Anglo-Saxon stories and there was a strong desire to better understand Indigenous and other cultures. People felt they did not know enough about their own cultures, let alone the cultures of others and were reluctant to discuss matters where they felt insecure about their knowledge or beliefs.[[73]](#footnote-74)

In the absence of research, there are many different examples of how cultural heritage organisations in Victoria are seeking to address cultural equity. This section highlights four– diversifying the Victorian Heritage Register, creating safe spaces for the Islamic community, showcasing the diverse stories of Victoria through the Victorian Collections website and work on migrant heritage in Victoria.

**Bonegilla Migrant Camp** is a former army camp that was transformed into a migrant reception and training centre in the years after World War 2, and 300,000 migrants passed through its doors. It is on the National Heritage List and the VHR. Today, the site and its associated oral, written and pictorial records in the Albury Library Museum, and Block 19 is open to the public bringing to light postwar immigration stories. The site is one of the assets cared for by Wodonga Council.[[74]](#footnote-75)



Figure 11 Bonegilla Migrant camp

HCV has recognised that more needs to be done to diversify the VHR. Priority 2 of the Strategic Plan 2021-25 is to ensure that, ‘the Victorian Heritage Register reflects the diverse range of state-significant cultural heritage valued by communities throughout Victoria’ and one of the key actions is to analyse the VHR to better understand current coverage and identify underrepresented places, demographic group, historic themes or geographical areas.[[75]](#footnote-76) This recognises that registration has evolved over time and is reactive to nominations received, so the VHR may not reflect the diverse range of state-significant cultural heritage and places and objects valued by Victorians.[[76]](#footnote-77) The **Victoria’s Framework of Historical Themes** addresses the diversity of people in Victoria through themes such as arriving in a new land, migrating and managing a home, and fighting for identity (theme 2) and theme 8 – building community life.[[77]](#footnote-78)

Another important tool in showcasing the diversity of heritage is the **Victorian Collections website**. The site represents cultural heritage collecting organisations in Victoria including Aboriginal Trusts and cultural centres, archives, heritage centres, historical societies, religious groups and private collections.[[78]](#footnote-79) The website presents curated stories about Victorian culture and history including stories relating to Aboriginal and built heritage.

The ‘**Many Roads: Stories of the Chinese on the Goldfields’** tells the story of the experiences of Chinese goldminers coming to Australia. Despite one in five men in Victorian goldfields towns being of Chinese origin at the peak of the mining boom, by the 20th century many of the landscapes, buildings and relics of the era were hidden or forgotten. This story celebrates the extent of Chinese influence in the making of Victoria and links to wider built heritage initiatives such as the proposal to create a Victorian goldfields World Heritage Site.[[79]](#footnote-80)

Engaging with heritage can also contribute to diversity through activities that build historical empathy and foster understanding between communities. The Australian Human Rights Commission has emphasised the need for more diversity in education to combat increased racism and xenophobia in the community, and history and cultural heritage are increasingly playing a role in helping students to develop historical empathy.[[80]](#footnote-81) An example of how heritage institutions can create spaces to address those issues is the **Islamic Museum of Australia**. The museum has a vision of being a leading cultural institution to showcase and preserve the arts, history, culture and rich heritage that Muslims and Islamic societies have brought to the world and more importantly, Australia. It aims to create a safe space to foster community harmony and facilitate an understanding of the values and contributions of Muslims to Australian society.[[81]](#footnote-82)

Stories of migration have been central to Victoria. In 2011 the HCV initiated a project to explore the many different post 1940s migrant stories of Victoria, through a partnership project with the City of Darebin.[[82]](#footnote-83) A pilot project worked closely with local groups to better understand their own heritage and stories better.[[83]](#footnote-84) This is one of many inclusive projects. For example, the Australia ICOMOS ‘Dragon Tails’ initiative highlighted stories of the Chinese community in Australia.[[84]](#footnote-85) In one interview with Mark Wang, a Melbourne businessman and entrepreneur, he talks about the work of his family in reviving dragon parades in Australia, the establishment of the Museum of Chinese Australian history, and his role in other community projects. He talks about the importance of heritage not just in terms of buildings but people,

‘what is quite unique about Chinatown (is that) it has a continuous history of Chinese occupation and the buildings are really the skeletal remains of the community. When we do a school tour down the street, we regard the history as the community who live there not the buildings…. Really the living history is just as important as the built form’[[85]](#footnote-86)

## Heritage and social capital

***This section shows how cultural heritage can contribute to social capital, using the Victorian government’s social capital approach.***

Another potential social benefit for cultural heritage in enhancing community strength and networks sometimes known as ‘social capital’. The 2006 Allen survey for example, found that 59% of Victorians agreed or strongly agreed that their life was richer for having the opportunity to visit or see heritage.[[86]](#footnote-87)

Social capital is an important policy driver in Australia and culture plays a significant role in that. In 2003 the Australian Productivity Commission reviewed the role of social capital in Australian public policy, defining social capital as a resource that can facilitate cooperation within and between groups of people, and the key elements contributing to social capital as norms, networks and trust.[[87]](#footnote-88) The Australian Bureau of Statistics (ABS) Social Capital Framework notes that social capital includes aspects of culture such as language, history and shared beliefs.[[88]](#footnote-89)

There is some work from the UK on the role of heritage in social capital, including studies into the difference taking part in heritage projects made to people’s networks and friendships. However, in the absence of systematic Australian research, this section illustrates how heritage can contribute to social capital in Victoria.

To understand social capital, the (former) Department of Planning and Community in Victoria created a framework of indicators in 2011 to measure community strength.[[89]](#footnote-90) These indicators set out to capture Victorian’s ability to get help when needed, community participation, satisfaction with amenity in their local area and community attitudes to issues such as feeling safe.

The Victorian social capital approach is based on three types of networks that can impact on individual and collective economic and social outcomes – close personal networks of families and friends, broader networks generated through participation in public life, and governance networks that linked individuals to decision making. Whilst the report does not specifically mention culture or heritage, it does note how cultural assets can be turned into specific outcomes such as employment, better economic activities, social welfare provision and improved community facilities through collaborative governance that enables people to be involved and get things done.[[90]](#footnote-91)

Taking part in cultural heritage activities can contribute to each of the three networks that contribute to community strength and thus social capital in Victoria. For example:

1. **‘Bonding’ - personal networks of family and friends**

Often one of the key reasons that people engage with cultural heritage is to build family networks and friendships.

For example, socialising is one of the key reasons for visiting **parks** in Victoria. In 2018-19 Parks Victoria found that since 2013 many more people had visited metropolitan parks for socialising and children’s play, rising from 21% to 35% as a reason for visiting a park.[[91]](#footnote-92)

Another important way in which connecting with cultural heritage contributes to bonding networks is through undertaking family history research. The State Library of Victoria provides a link to the many different **genealogy and local and family history societies in Victoria and Australia**.[[92]](#footnote-93) The second oldest genealogy society in Australia (the Genealogical Society of Victoria) also provides a regular programme of activities and information to support people in learning about their own family histories and stories.[[93]](#footnote-94)

1. **Bridging networks created through participating in public life**

Volunteering at a cultural heritage site can contribute to broader ‘bridging’ networks that bring people together, whilst opportunities to engage or consulting on cultural heritage projects and issues can contribute to governance networks. As Annex 1 notes, around 5.6% of the Australian population volunteer in the arts, culture or heritage space, and organisations such Museums Victoria and the National Trust of Australia (Victoria) both have major volunteering programmes.

The **Heritage Victoria Hands on Heritage** programs, launched in 2000, enabled volunteers to work on heritage places as a way of broadening community networks through heritage. The program increased the overall volunteer hours each year from one site with 14 days of volunteering in 2000 to 30 sites with 1100 days of volunteering. Wayne Hood, chairman of the Lake Tyers Aboriginal Trust, commented on the restoration of the Lake Tyers church, noting that, ‘the church is now the focal point of the community…in addition to that members of our community were involved in the actual restoration work.’[[94]](#footnote-95)

1. **Involving people in local decision making**

Engaging in cultural heritage can contribute to collaborative or governance networks that involve people in local decision making. For example, people can participate in heritage decisions in Victoria by putting forward proposals for new items on the Victorian Heritage Register.

Research by Parks Victoria shows how important this is to Victorians. The project asked Victorians what characteristics of communities are important. 72% felt it was important for people to participation in decisions made by government, and 61% thought it was important to volunteer in local groups. The report talks about the importance of providing participatory activities, the need for support for community infrastructure and supporting organisations that enable people to participate. They also talk about the importance of designing shared civic environments that foster mixing and place attachment. The benefits of networks include evidence for their contribution to health and psychological wellbeing, positive parenting and child development, success at school, employment outcomes, positive aging better decision making, the spread of information and innovation inclusive attitudes and safety. They also talk about the importance of community planning.[[95]](#footnote-96)

# Chapter 2: Heritage and the environment

***The greenest building is the one that already exists (*Carl Elefante)**[[96]](#footnote-97)

This chapter reviews evidence for the environmental impacts of caring for cultural heritage.

The focus is on how retrofitting existing buildings can contribute to reducing carbon emissions, and the role of the existing building stock in reducing waste. We also touch briefly on the potential role of traditional building skills and vernacular building practices in helping to avoid ‘maladaptation’.

We are very aware that there is so much more that could have been addressed in this chapter, such the role of traditional Aboriginal cultural knowledge and skills in addressing major landscape and environmental issues or indeed climate change. There is also more to be learned about the contribution that conserving cultural heritage can make to biodiversity and ecosystem resilience. These may be topics for future work.

Where possible this chapter draws on existing Australian research, but it is also important to acknowledge the Historic England volume ‘Heritage and the Environment 2020’ which summarises a huge range of recent research into the role of heritage in the environment for England.[[97]](#footnote-98)

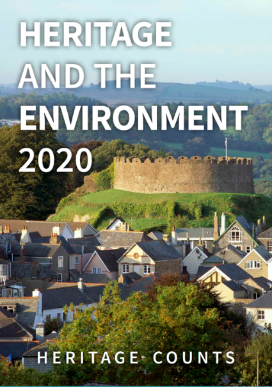


Figure 12 Heritage and the environment 2020, Historic England

## Climate change and the built environment

Climate breakdown is a major issue for our time, and the built environment is one of the major issues driving the greenhouse gas emissions that are behind climate change.

The world is 0.8 degrees Celsius warmer than it was a hundred years ago and with a 2-degree Celsius warming, the earth will not be tenable for many flora and fauna species. Even a 1-degree rise will lead to erratic weather, sea level rises and, as a result, mass migrations. At current emissions levels we are on a trajectory for a more than 3-degree global temperature rise by 2050.[[98]](#footnote-99)

Victoria’s climate has already increased by 1.2 degrees since 1910. If global emissions continue, Victoria will face double the number of very hot days and high fire danger days, a sea level rise of around 24cm and a decline in Alpine snowfall.[[99]](#footnote-100) The Victorian *Climate Change Act 2017* includes actions aimed at meeting the emissions reductions goals set in the Paris Agreement and commits Victoria to net zero emissions by 2050, in line with wider Australian commitments.[[100]](#footnote-101)

The greatest cause of global warming is particulate matter associated with global greenhouse gas emissions, the most problematic of which is carbon dioxide. CO2 is primarily released through coal oil and gas extraction and production, with cement (at 5%) being the fourth largest emitter of CO2 worldwide. In 2018 the Intergovernmental Panel on Climate Change (IPCC) called for urgent action to prevent further global warming maintaining that global warming should be limited to no more than 1.5 degrees Celsius.[[101]](#footnote-102) It further argued that changes is needed urgently, and that the public needed to be involved in new approaches.

The built environment is one of the key issues driving carbon emissions. As the 2021 State of the Environment report notes,

Our built environment is currently the world’s single largest contributor to greenhouse gas emissions. It consumes around 33% of our water and generates 40% of our waste … As much as 25% of Australia’s carbon emissions come from buildings.[[102]](#footnote-103)

As a result, more and more attention is being given to how best to reduce greenhouse gas emissions from the built environment. Victoria currently contributes 17% of Australia’s emissions. Residential, commercial services and manufacturing are some of the highest emitting sectors.[[103]](#footnote-104)

Victoria has seven adaptation plans, one of which focuses on the built environment. The Victorian Built Environment Climate Change Adaptation Action Plan (2022-2026) defines the built environment system as, ‘our homes and buildings heritage places, energy system, public parks and sports fields’.[[104]](#footnote-105) The aim of the plan is to make our cities, towns and suburbs more resilient to climate impacts.



Figure 13 Victorian Built Environment Climate Change Adaptation Action Plan 2022-2026

Cultural heritage is in the forefront of the plan, through the first principle to,

Respect Traditional Owner and Aboriginal Victorian knowledge: incorporate the knowledge of Traditional Owner Groups and Aboriginal Victorians in adaptation decision making and ensure this is valued and respected.[[105]](#footnote-106)

The plan also talks about understanding risks to heritage assets:

There is an ambition to train and upskill heritage and built environment industry professionals regarding the relationship between heritage, energy efficiency, thermal performance, climate change and disaster risk management, utilising a standard risk assessment methodology tailored for heritage places and values.[[106]](#footnote-107)

The plan advocates for retrofitting existing buildings and considering the embodied energy in existing buildings as a key element in addressing climate change.

This recognises that a large percentage of the built environment consists of older buildings. Many of the buildings that we will be using in the future have already been built. Existing buildings constitute 98% of the building stock in Australia in any one year.[[107]](#footnote-108) There are similar figures for other parts of the world. Half of European residential buildings were built before 1970 and in the United States residential buildings that are more than 30 years old account for more than 60% of the total [[108]](#footnote-109) In England around 21% of all homes are over 100 years old, while in the US two thirds of the building stock was built between 1950 and 2000 (Historic England 2019, Elefante 2017).[[109]](#footnote-110) In relation to commercial buildings, 33% of all offices in England and Wales were built before 1919 as were 48% of the retail buildings and 17% of industrial buildings.[[110]](#footnote-111)

## Heritage and retrofitting

Retaining and retrofitting those existing buildings can make a significant contribution to reducing greenhouse gas emissions from the built environment. To meet its carbon emissions targets, Australia must halve its energy consumption per capita. Given the dominant role of existing buildings in the building stock noted above, one of the key strategies for achieving this is ‘retrofitting’ existing commercial and residential buildings to reduce their energy consumption. The Global Alliance for Building and Construction reports that current renovation rates must increase from 1% to 3% of all building work to achieve net zero carbon by 2050.[[111]](#footnote-112)

This is reflected in the ground-breaking Melbourne initiative to encourage the retrofitting of existing commercial buildings to upgrade their energy and water efficiency.

The commercial sector of Melbourne generates around 53% of the municipality’s emissions. In 2010 the City of Melbourne initiated the **1200 buildings program** to provide commercial building owners with information and links to incentives and grants to help them upgrade the energy and water efficiency of their assets. At the time it was anticipated that if we could retrofit 1200 existing buildings to 4.5-star NABERS by 2020 it would generate an economic uplift of $2 billion and create 8000 ‘green collar’ jobs. This would also eliminate 383*,*000 tonnes of CO2-e per annum. By 2015, 541 buildings had been retrofitted and 315 were planning a retrofit. The project argues that retrofitting delivers lower operating costs, higher return on investment and lower tenant churn and vacancy rates. It can also improve the capital value of the building and makes the building more attractive to investors. [[112]](#footnote-113)

The heritage sector has been increasingly focussed on the value of retrofitting existing buildings in addressing climate change. Some of that is about how to retrofit heritage buildings without compromising their cultural significance, such as the Heritage Victoria technical leaflet on improving environmental and sustainability measures for heritage buildings. [[113]](#footnote-114) Heritage organisations have also been active in raising awareness of the value of retrofitting existing buildings, whether protected or not, in addressing climate change. Historic England, for example, note that, ‘sympathetic refurbishment offers the greatest reduction of carbon emissions making it the most appropriate pathway for meeting the UK Government’s net zero target’.[[114]](#footnote-115)

The policy challenge is that embodied energy in existing buildings is not always recognised as contributing to environmental outcomes. In Australia there is no legislative requirement to demonstrate the need to demolish an existing structure and as a result, Australia continues to demolish major infrastructure well short of its lifecycle. Even the current Australian Green Star ratings system - a voluntary code designed to encourage energy efficient building - primarily applies to new buildings.[[115]](#footnote-116) There is also often a perception that older buildings perform badly in terms of energy efficiency, and it is better to build new, more energy efficient buildings.

Heritage organisations have therefore been active in exploring new methods and approaches to better recognise the embodied energy in existing buildings (whether listed or not) through initiatives such as the Climate Heritage network.[[116]](#footnote-117) For example, Historic Scotland has produced guidance on the use of lifecycle costings for existing buildings[[117]](#footnote-118) and Historic England has published a series of webinars on the role of heritage in climate changing, including adaptive reuse as climate action, the role of culture and heritage in climate action, and harnessing cultural heritage for climate action (see Annex 5).[[118]](#footnote-119)

Much of this is based on a growing body of research evidence on the contribution of existing buildings to reducing carbon emissions. Jennifer Faddy has provided a recent overview of existing research for Australia in her report on the potential for cultural heritage to contribute towards Australian carbon trading initiatives. [[119]](#footnote-120) For example, she notes:

* a study of 60 existing pre-2005 buildings in Melbourne that compared energy and carbon intensities for upgrading buildings[[120]](#footnote-121)
* a 2018 study comparing refurbishing a building to 5 star NABERS with demolishing and rebuilding to 3 star[[121]](#footnote-122)
* a study comparing refurbished and new buildings in Hong Kong and Melbourne[[122]](#footnote-123)
* a 2007 Adelaide study which provided a tool for depicting the embodied energy in the Adelaide urban environment[[123]](#footnote-124)
* a 2010 RMIT study that compared lifecycle energy, greenhouse gas, water and other impacts for a range of Australian buildings dated between 1826 and 2000 compared to retrofitted designs[[124]](#footnote-125),
* a review of studies of the environmental performance of buildings built between 1997 and 2010[[125]](#footnote-126); and
* a study that compared a 1910 South Australian villa with a renovate/extend option and demolish and rebuild option.[[126]](#footnote-127)

Ruth Redden and Robert Crawford have also provided a recent overview of the arguments for retaining existing historic buildings in Australia, including important discussion of the contribution of traditional knowledge to the agenda.[[127]](#footnote-128)

Two recent empirical studies from Historic England are ‘Understanding Carbon in the Historic Environment’, which used lifecycle assessments to model carbon emissions from two retrofit projects,[[128]](#footnote-129) and ‘Carbon Reduction Scenarios for the Built Historic Environment’ where researchers from the University of West of England evaluated the opportunity for England’s pre-1919 buildings to contributing to reducing emissions in the built environment.[[129]](#footnote-130)



Figure 14 Know your home, Know your Carbon (Historic England 2020)

In terms of literature reviews, the 2020 ‘Know your home, know your carbon’ report is an overview of existing literature on how retrofitting existing buildings can contribute to addressing climate change. As many traditional Australian buildings draw on nineteenth century British building techniques, much of this research is relevant.[[130]](#footnote-131)

Some of the key points that emerge from that research highlight the significance of retaining and retrofitting the existing built environment in addressing climate change:

* ***The energy embodied in existing buildings in Australia was calculated in 2008 to be equivalent to 10 years of the total energy consumption of the entire nation***. The embodied energy varies significantly across different materials, from about two gigajoules per tonne for concrete to hundreds of gigajoules per tonne in aluminium.
* ***Embodied energy in a building can be more important than the operating energy***. The focus of many energy efficiency programs is on the operating energy of a building. The CSIRO notes that the embodied energy of a building is a significant multiple of the annual operating energy consumed, ranging from around 10 for typical dwellings to over 30 for office buildings. Making buildings such as dwellings more energy efficient usually requires more embodied energy, thus increasing the ratio even further.[[131]](#footnote-132)
* ***If we do not count embodied carbon we underestimate the emissions of new buildings by up to a third*** In its comprehensive summary of the role of existing buildings in reducing carbon emissions Historic England notes the importance of embodied carbon, and that if the UK is to meet its legally binding commitment to become carbon neutral by 2050, then addressing the embodied carbon of the built environment is a priority.[[132]](#footnote-133)
* ***In the context of the climate emergency, it may be that materials conservation is even more relevant and of greater value than cultural preservation.*** Carl Elefante argues that in future our primary task as preservationists will be to serve as stewards of the massive material and energy investments made in mid-century structures.[[133]](#footnote-134)
* ***Despite being a significant element in building energy there are currently no regulations or targets in Australia relating to embodied energy in the built environment.*** Despite representing between 10% and 30% of the operating energy of a building over its lifetime, Faddy notes that there are currently no regulations or targets in Australia relating to embodied energy in the building environment, and indeed it is not a component of the global trading industry.[[134]](#footnote-135) The Federal Governments definition of a carbon neutral building or precinct does not include any calculation of embodied energy.
* ***Older buildings do not perform badly in terms of energy conservation.*** A study of eight residential buildings in Victoria combine life cycle modelling with building energy efficiency simulation. They found that lower life cycle primary energy consumption does not necessarily lead to lower carbon emissions. They also note that while the common perception is that old buildings often perform badly in terms of energy conservation, this was not always the case.[[135]](#footnote-136)
* ***Retrofitting existing dwellings in Melbourne would result in a 36% reduction in annual operating energy.*** A study of the embodied impacts of retrofitting existing dwellings pre-2005 in greater Melbourne using a 25-year life cycle approach found that all the pre-2005 dwellings in the study area can be retrofitted from 3 to 6 stars (NatHErs) resulting in a 36% reduction in energy efficiency. An upgrade to 7 stars would reduce energy consumption by 76%.[[136]](#footnote-137)
* ***Retrofitting older single detached dwellings in Melbourne presents the greatest potential for lifecycle energy and carbon savings.*** In a further study of the City of Dandenong, Seo and Foliente looked at the impact of retrofitting buildings across a suburb.[[137]](#footnote-138) They found that environmental benefits rose faster than financial benefits over a dwelling’s lifetime, suggesting that financial incentives may be needed to achieve optimum results. [[138]](#footnote-139) However, they recommended double glazing and insulation as primary strategies which may not always be appropriate for older buildings.
* ***Retrofitting older residential buildings is vital to addressing climate change*** A large percentage of UK residential buildings date to pre-1919 but historically the role of these buildings in contributing to sector energy efficiency has been overlooked. Historic England modelled the potential cost and effectiveness of retrofitting this cohort. They found that approximately 15 million tonnes of CO2 emitted annually by this sector could be reduced to zero by 2050 by retrofitting.[[139]](#footnote-140)
* ***Renovating results in fewer carbon emissions than demolishing and new build, even if embodied energy is excluded.*** A 2011 study of a 1910 property in South Australia compared the energy efficiency of a renovation project with the option of demolishing and rebuilding. Over 50 years the renovate and extend option yielded 26% less life cycle emissions than the demolish and rebuild option. The calculation excluded the embodied energy in the building which might have resulted in a higher saving .[[140]](#footnote-141)
* ***Refurbishing an existing building produces 36% less carbon emissions than a new build.*** Edge Consulting used lifecycle analysis to compare refurbishment with demolition and new build over a 15-year cycle. The refurbishment scenario had 36% less carbon emissions, estimated to save approximately 34,740,000 kgCo2-e over 15 years.[[141]](#footnote-142) In 2008 Jean Caroon compared the CO2 emissions in new construction with the refurbishment of existing homes and concluded that energy efficient homes recover the carbon expended in construction over 35-50 years.[[142]](#footnote-143)
* ***Despite convincing evidence that historic buildings are high environmental performers, most environmental improvement initiatives within building and planning systems continue to focus heavily on operational performance.*** As noted above, embodied energy is not a consideration in most building performance tools and ratings. However, focussing solely on operational energy is unlikely to address greenhouse gas emissions from the building sector. When a typical historic building is refurbished and retrofitted it will emit less carbon by 2050 than a new building.[[143]](#footnote-144)
* ***Industry standard performance measures are not always accurate for older buildings.*** In the UK, energy performance certificates for buildings are based on standardised measures, for example for the U value of solid walls.[[144]](#footnote-145) A study by Li et al suggests that many of the standard U values for solid walls are inaccurate and this may affect the overall energy performance ratings given to older buildings.[[145]](#footnote-146)

## Sustainable building materials in older buildings

The materials used in older buildings are also a consideration in relation to embodied energy.

* ***The service life of materials can have a significant impact on recurrent embodied energy.*** Rauf and Crawford of the University of Melbourne explored the relationship between embodied energy and the service life of materials. They found that the choice of materials could significantly affect energy use and argued that the recurrent embodied energy involved in maintaining and refurbishing a building also needed to be taken into account in calculating embodied energy.[[146]](#footnote-147)
* ***Traditional building materials such as timber, brick and concrete often have lower embodied energy than new materials such as glass, steel or aluminium.*** Materials such as concrete and timber have the lowest embodied energy intensities but are consumed in very large quantities, whereas materials with the high energy content such as stainless steel are used in smaller amounts. Thus, the greatest amount of embodied energy in a building is often in concrete and steel.[[147]](#footnote-148) A study by RMIT of Australian historic buildings confirmed the relatively low embodied energy of the materials used in heritage buildings.[[148]](#footnote-149)
* ***The reuse of building materials commonly saves about 95% of embodied energy which would otherwise be wasted.*** The CSIRO notes that some materials such as bricks and tiles suffer losses for up to 30% in reuse. The savings by recycling materials for reprocessing varies considerably with savings up to 95% for aluminium but only 20% for glass. And some reprocessing may use more energy, particularly if long transport distances are involved.[[149]](#footnote-150)

There are also other environmental issues to consider. There is a growing interest in the impact of harmful pollutants on indoor air quality, including Volatile Organic Compounds (VOC) from modern construction materials such as glues and paints which can give off gas for months after construction or use. Lime render, mineral paints, linseed putty and beeswax used in traditional building conservation are low VOC materials in comparison to many modern materials.

In Australia there is interest in the use of sustainable materials in new buildings, including choice of timbers, the use of recycled material including brick, but there has been less emphasis on the environmental benefits of the materials in existing buildings. This could be an area to explore further.

## Heritage and traditional building knowledge

Whilst retrofitting existing buildings has been a key focus of many initiatives around decarbonisation in the built environment, retrofitting programs don’t always take traditional building knowledge into account. There is a risk that retrofitting programmes could worsen some of the problems that they have set out to address. This is known as ‘maladaptation’. This has been a particular issue in Wales which has a large percentage of older buildings including terraced housing and where poor retrofitting risks making issues such as damp, potentially worse.

One of the key issues in the debate around retrofitting is the question of what can be learned from traditional, historical building techniques, and whether much of the current retrofit pathways may in fact be delivering unintended consequences and leading to the overuse of carbon and energy.

Many historic buildings were designed with a sophisticated understanding of passive heating and cooling and built from local or low carbon materials. For example, in the run up to the international Conference of the Parties on climate change (COP 27), vernacular architectural practitioners from countries such as Nigeria highlighted some of the lessons of traditional low carbon vernacular building practices, and how they respond to the pressures of climate change including systems of heating and cooling, dealing with water and low carbon materials.[[150]](#footnote-151)

Redden and Crawford argue that there is much to be learned from traditional knowledge including older building technology. Many 19th century Australian buildings were constructed with traditional cooling mechanisms and natural ventilation.

**Parliament House in Melbourne**, built in 1859 by J G Knight has a cooling system that involved a venting tower in the garden, concealed in the form of a decorative folly. The authors also note that window shades, verandahs and vegetation played a key role in reducing thermal gain in older Australian houses. They also cite Rippon Lea in Melbourne, built with a lake fed by stormwater pipes, where water was available to irrigate the garden and could be used in the house.[[151]](#footnote-152)



Figure 15 Parliament House, Melbourne

Pender and Lemieux also advocate for the need to understand the lessons of traditional buildings. Space heating and cooling, and the control of indoor temperature are seen as one of the principal contributors to the built environment’s intensive use of energy and carbon. The need to address this is based on the fundamental principle that thermal comfort is a function of air temperature. Pender and Lemieux (2020) instead argue that we need to re-evaluate the lessons from traditional buildings as a first step to understanding how best to retrofit older buildings. For example, older buildings often perform well in terms of thermal mass, heating and cooling and controlling moisture. They also argue for understanding more about thermal comfort and how people use and perceive building, rather than simply relying on standards.[[152]](#footnote-153)

Many older Australian terrace buildings use sliding sash windows. Traditional features such as vertically sliding sashes can be used with awnings or shutters to give the highest possible degree of control over sunlight, ventilation and security.

In addition to the Heritage Victoria leaflet on retrofitting older buildings, there is a need for more general information and research for building owners to assist with finding retrofit options. In the UK the Sustainable Traditional Buildings Alliance (STBA) promote responsible retrofitting and are one of the founders of the ‘Whole House’ approach. They focus on issues including the health of occupants, the health and durability of the building consumption, the energy consumption attributed to the building, the impact on communities and the impact on the natural environment. They provide research and resources for building owners including the STBA guidance wheel which helps people to assess different options for retrofitting.[[153]](#footnote-154) The Historic England guide to Energy Efficiency and Historic Buildings, also provides ideas for homeowners.[[154]](#footnote-155)

## Heritage and the circular economy

Another argument for retaining existing buildings and infrastructure, including registered heritage places, is the contribution that doing so can make to reducing waste, and what is now known as ‘The Circular Economy’.

A linear supply chain processes natural resources into products that support human wellbeing that are subsequently disposed of as waste, whereas a circular economy model minimises overall natural resource extraction and environmental impact by extending the use of materials and reducing the consumption and waste of materials and energy. The useful life of materials is extended through reuse, design for longevity and redefining consumption to include sharing rather than individual ownership.

Around 33% of Australian landfill comes from construction and demolition waste (Faddy 2018 quoting NSW government).[[155]](#footnote-156) The Green Buildings Council of Australia also notes that construction accounts for 50% of all materials used.[[156]](#footnote-157)

Reducing waste also contributes to decarbonisation. The IPCC has stated that among other measures, circular material flows can make an important contribution to the decarbonisation of most industrial processes, and that there has been more attention paid to end-use demand, material efficiency and more and better-quality recycling measures.[[157]](#footnote-158) Australia claims to recycle around two thirds of all waste but still disposes an amount that is close to that of the entire USA.[[158]](#footnote-159)

Australian circular economy policies focus on recycling, including the re-use of materials in new buildings, rather than on the retention of existing buildings in the first place.[[159]](#footnote-160) For example, the 2023 federal budget commits funding to boost Australia’s plastics recycling, raising awareness of recycling and the waste export ban.[[160]](#footnote-161)

‘Recycling Victoria – a New Waste Economy’, is Victoria’s recycling policy. The priorities include recycling, investment in waste to energy, stronger recycling oversight, reducing business waste, supporting local councils and behaviour change. It is estimated that this will boost Victoria’s economy by $6.7 billion, create more than 3900 new jobs, provide cost savings for households, and improve social inclusion. Despite an emphasis on designing to last, repairing and recycling, there is little mention of the role of existing buildings.[[161]](#footnote-162)

The Green Building Council of Australia and others have been looking at the role of construction in the circular economy. They note that the three key pillars of the circular economy are designing out waste and pollution, keeping products in use, and regenerating natural systems. These can be extrapolated to include extending life through reuse, maintenance and refurbishment – key elements of heritage practice. They also note the economic advantages of the circular economy, citing data from KPMG Economics that suggests that for example, the adoption of a circular economy in the food, built environment and transport sectors in Australia is estimated to be worth $210 billion to GDP by 2048 with the potential to generate 150,000 jobs by 2025 through circular economy initiatives in the built environment, transport, manufacturing, and recycling sectors.[[162]](#footnote-163)

Gillian Foster has undertaken a comprehensive literature review of the research into the relationship between cultural heritage and the circular economy as part of the EU Horizon 2020 Funded project, ‘Buildings as Material Banks.’[[163]](#footnote-164) Otherwise, in Europe this study has identified relatively little empirical research relating to the role of heritage or adaptive re-use in reducing construction waste.

It is often argued that the best way to reduce waste from construction is to recycle building materials. For example, urban mining in Sydney has been used to retain excavated material from new infrastructure projects, such as Pyrmont yellow sandstone. There is also a growing interest in deconstruction in building as a movement – the reusing, repurposing and recycling of materials from existing buildings. The concept of ‘design for disassembly’ encourages the design of new buildings that anticipates the demolition and reuse of materials to reduce carbon emissions and waste.[[164]](#footnote-165)

For example, Melbourne’s **Goods Shed No 5** has been demolished through a process that has seen individual components dismantled and catalogued for repurposing. The site owner is committed to giving the materials new life through a new hotel development on the site. The salvaged items include 1944 bluestone pavers, 20 timber sliding doors, 400 steel trusses, and 105 steel window frames as well as 2km of salvaged timber purlins. The existing concrete structure of the Goods Shed has been retained on site. [[165]](#footnote-166)

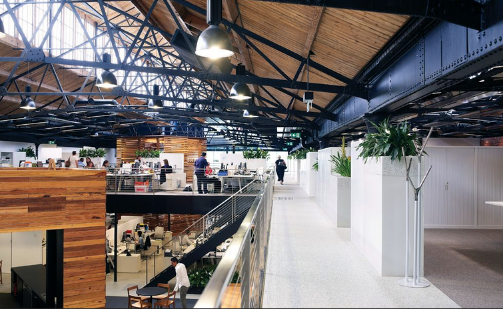


Figure 16 Reuse of historic materials at the Goods Shed, Melbourne.

However, salvaging materials only goes part of the way towards a truly circular economy, and it is possible that retaining existing buildings can potentially offer greater savings in terms of both reducing waste and energy efficiency.

Bricks in good condition can have a lifespan of several hundred years – crushing them for aggregate creates unnecessary waste. In Australia more than 75% of construction waste is clean fill brick, timber and concrete. Manufacturing bricks is a carbon-intensive process resulting in the emission of 211-242 kgCO2e per tonne of bricks. Although new bricks may contain recycled material, these only account for about 9% of the total with the majority sourced from virgin clay resources. Demolishing buildings that are still structurally sound and crushing material for aggregates creates unnecessary waste when there are also options for deconstruction.[[166]](#footnote-167)

# Chapter 3: Heritage and place

**The conservation of cultural heritage is closely interwoven with the planning system which regulates new development and changes to the places around us.**

The character, distinctiveness and quality of existing places impacts on our quality of life and is a starting point for thinking about change new development. Equally, rundown or poorly maintained places can impact negatively on our quality of life. There is a rich literature around the importance and value of places, how they give meaning to our lives and how understanding the ‘things we know or sense about places but seldom put into words’ can help bring our minds to bear on how our communities, regions and landscapes can change.[[167]](#footnote-168)

Placemaking is a multi-faceted approach to the planning, design and management of public spaces and neighbourhoods and Australia’s first Placemaking Summit was held in Melbourne in 2020.[[168]](#footnote-169) The role of cultural heritage is sometimes overlooked in thinking about placemaking; for example, many of the measures of city competitiveness or regional identity overlook the role of cultural heritage in creating distinctive places.

In contrast, cultural heritage is central to of the notion of Country. Country is the term used by First Nations peoples to describe the land, water and sky to which they are connected. The term contains complex ideas about law, place, custom, language, spiritual belief, cultural practice, material sustenance, family and identity.[[169]](#footnote-170)

In Victoria that critical link between heritage and place is reflected in the continuing location of Heritage Victoria within the State government planning department, despite machinery of government changes over time.

Caring for heritage is one of the two principal aims for the Department of Transport and Planning as a whole – ‘A safe and quality-built environment’ with two linked objectives:

* improved liveability, sustainability and inclusiveness of public spaces and neighbourhoods, and
* effective protection of cultural and natural heritage.[[170]](#footnote-171)

The main sources of research into the contribution of cultural heritage to placemaking are economic studies looking at heritage in regeneration and revitalisation, or in tourism and place marketing. For example, PlaceEconomics has undertaken studies in cities across the US looking at neighbourhood revitalisation, affordable housing, and heritage resilience.[[171]](#footnote-172)

There is also work in the social sciences, environmental research and environmental psychology that explores people’s connection with place and the meanings people attribute to places.[[172]](#footnote-173) The volumes on heritage and society and the economy synthesise many international studies across different disciplines relating to heritage and placemaking.[[173]](#footnote-174)

This chapter explores the role of heritage in three aspects of place – distinctiveness, regeneration and place attachment. As ever, placemaking overlaps with other themes so there is additional evidence for the role of heritage and regeneration in the section on creative industries in Chapter 4 whilst Chapter 5 includes data on heritage and property prices.

## Heritage and distinctiveness

Cultural heritage contributes directly to the quality, distinctiveness and identity of places. Whilst local people often value the distinctive nature of a place, those qualities can also help a place achieve its aspirations to grow and prosper, socially and economically. A stronger understanding of local heritage is important not just in marketing a place but it can help ensure what is considered important is considered by those who influence how a place develops.[[174]](#footnote-175)

City performance, brand image and reputation are often key elements to the competitiveness of cities, looking to attract investment. Although most of the measures used to track competitiveness focus on issues such innovation, reputation and sustainability it is notable that the key image used in Melbourne place branding involves pictures of two iconic heritage assets - Flinders St Station and a historic tram.[[175]](#footnote-176)

Cultural heritage is also used to market regional areas of Victoria. For example, Victoria’s gold rush plays a key role in marketing and describing the goldfields region, distinguishing it from the beaches, lakes and mountains for example of Gippsland. [[176]](#footnote-177) Similarly, Regional Living Victoria markets the benefits of moving to regional areas, often in terms of their heritage.[[177]](#footnote-178)

In their report on the Value of Heritage to Ballarat, SKM explore **the competitive advantage of heritage to Ballarat**. They note the difficulty of estimating how important heritage is in attracting people to a region. In a survey of residents on what attracted them to Ballarat, one third of respondents noted that Ballarat’s heritage was the main or important reason for living in Ballarat with only 12% indicating that they had no interest in heritage. 6% cited heritage as the reason for moving to Ballarat, 25% said it was an important part of the decision. 57% said they enjoyed the city’s heritage character but said was not a determinant of why they live in Ballarat and only 12% said it was of no interest to them.

Figure 17 Heritage is key to the competitive advantage of Ballarat

Identity, place branding and heritage are central to determining the future social and economic outcomes of local places whilst also providing authenticity and credibility in place brands. Ideas for making the most of local heritage include supporting festivals, reviving forgotten heritage, promoting heritage trails, regenerating assets and working with local heritage groups.[[178]](#footnote-179)

For example, the **Pyrenees Futures** project took a place-based approach to the strategic planning of towns, working with the community to understand what makes each town its own special place, and then creating framework plans to ensure future development complements and enhances the feel of the towns (HCV 2020:20).

## Heritage and regeneration

Heritage also plays a vital role in the renewal and regeneration of rural and urban places (see also heritage and creative industries in Chapter 4).

One of the key activities to improve the economic and social performance of town and cities are programs of revitalisation and renewal. Poorly maintained and run down places can have negative impacts on people’s wellbeing, health, sense of belonging and indeed economic prosperity. Equally, repairing and renewing buildings and infrastructure can have a positive impact on places and people’s attachment to them.

Regeneration is about breathing new life and vitality into an ailing community, industry and areas bringing sustainable long-term improvements to local quality of life including economic, social and environmental needs. Culture and cultural heritage can be a catalyst for regeneration.

Much of the funding for cultural heritage in Australia and elsewhere has been devoted to the regeneration and rehabilitation of run down urban (and rural) areas, buildings and sites, which in turn contributes to the quality and performance of places including economic and social outcomes.

For example, the former **Heritage Victoria Living Heritage Program (2006-2023)** funded repair and conservation works to historic buildings and objects on the VHR which in turn contributed to the condition and appearance of places. Many of these projects addressed urgent works, such as **St Marks Anglican Church (Fitzroy)** where work repaired cracked brickwork and rusted out roof sheets.

Similarly in the 1990s English Heritage repositioned itself as a regeneration agency, supporting major initiatives to regeneration townscapes and contribute to the wider government agenda on social inclusion and in creating places where businesses would want to locate and invest.

Although evaluations of heritage grant programs in Victoria and elsewhere have identified some of the economic and social benefits of funding conservation, there is less empirical research into the difference that investing in heritage conservation can make to economic and social outcomes.

The Heritage Fund is the largest funder of heritage in the UK and has been supporting regeneration programmes for more than 20 years. The Fund has undertaken a systematic approach to evaluating the impact of that funding, including following up on the investment in Townscape Heritage Initiatives projects over many years.

The 2022 study draws together the lessons from many years of funding such projects. Whilst they note there is no single definition of what place-based working means, they identify some key factors including adopting a long-term community led approach, partnerships, holistic approaches and embracing the full breadth of heritage.[[179]](#footnote-180)

## Heritage and place attachment

One of the key concepts in understanding the link between cultural heritage and placemaking is the idea of ‘place attachment’.

The idea of place attachment originated in gerontology and is about the way people create meaning and personal identity through their attachment to place.[[180]](#footnote-181) ‘Place’ has been described as, ‘what gives spaces meaning’ – a concept that has very clear links to the way heritage practice looks at what makes places special through concepts of cultural value. In the study of ageing, continuity in the physical environment and the routines of daily life can lead to stronger place attachment.[[181]](#footnote-182)

Cultural heritage activities can include cultural mapping and engaging with communities to understand those meanings – in other words what is important to them about places, objects or collections, or in Tony Hiss’s words, ‘the things we know or sense about places but seldom put into words’ (see above).[[182]](#footnote-183)

The Migrant **Heritage Project** is an example of the kind of project that sets out to map people’s connections to place. This collaboration with the former Migrant Heritage Centre (MHC) in NSW and the Immigration Museum set out to explore migration in Victoria from the 1940s to the present, to uncover the places, objects and collections associated with people who participated in this period of major change. The project worked with the City of Darebin and migrant communities to identify places that mattered to them. The focus was on migration as lived experience rather than migration as heritage.[[183]](#footnote-184)

There is a correlation between people’s attachment to their local area and their wellbeing. A survey of 1328 people across regions with different history confirmed people had stronger attachment with place and were more engaged in civic activity when local neighbourhood ties are stronger and when those individuals were more interested in their own roots.[[184]](#footnote-185)

There is some systematic research into how funding for heritage can change people’s attitudes to place. The Heritage Lottery Fund has funded heritage regeneration programs over many years. The Fund surveyed 4300 people across 12 different locations where the fund had invested money over the past 20 years. The survey showed that that investment had changed local people’s perceptions of places, contributed to their pride in a local area and to social cohesion.[[185]](#footnote-186)

People are emotionally connected to places and want to share those meaning with others. A UK National Trust study combined Functional MRI scanning with qualitative and quantitative interviews of 2000 people to understand emotional connections with special places. Key areas of emotional processing in the brain are activated by a place deemed to be special by an individual, supporting feelings of a deep connection.[[186]](#footnote-187)

There is also some evidence that a strong sense of place is linked to aspects of social capital, such as civic engagement (see Chapter 1). Multiple academic studies show links between place attachment and environmentally responsible behaviours across age groups and that stronger levels of place attachment are also associated with higher life satisfaction and are a predictor of wellbeing.[[187]](#footnote-188)

Those studies are about places in general rather than protected heritage areas, and indeed a 2009 review of the literature on whether it is possible to identify relationships between heritage, a sense of place and social capital found no major studies that linked all three but did find links between heritage and a sense of place, and between a sense of place and social capital.[[188]](#footnote-189)

As we get to know a place better and endow it with value, perhaps through activities such as cultural mapping, the strength of place attachment increases. There is also evidence that living in ‘more historic’ built environments (assessed in terms of density of listed buildings present) is correlated to a stronger sense of place, even after factoring in socio-economic factors that impact on sense of place.[[189]](#footnote-190)

## Heritage and disaster recovery

As historian Peter Read notes, the loss of places whether through disaster or other can have a devastating effect on people.[[190]](#footnote-191) Engaging with cultural heritage, through the stories of places, can play an important role in the disaster recovery process.

The 2019-20 Bushfire Recovery Framework for Victoria sets out core principles for disaster recovery that start with understanding the local context, recognising complexity and using community led approaches.[[191]](#footnote-192) There is rightly an emphasis on Aboriginal culture in the long-term outcomes including the importance of cultural safety, trauma and participation. However, understanding the cultural heritage of places as a whole, and stories and feelings of everyone affected by such disasters is equally important.

In the wake of the disastrous 2009 bushfires, several projects used creative approaches and oral histories to help communities come to terms with the impact of the bushfires and their aftermath often through cultural heritage. Creative Victoria funded 42 creative recovery projects through its Arts Recovery Quick Response fund.[[192]](#footnote-193) There was also support for Aboriginal culture and healing, including support for Aboriginal cultural heritage across Country.[[193]](#footnote-194)

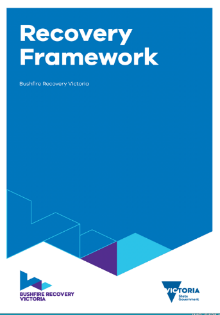


Figure 18 Cultural heritage can play a key role in helping to rebuild after disasters.

**Strathewen** on the Country of the Wurundjeri Woi-Wurrung people, 40km north of Melbourne, was devastated by fire on 7th February 2009 in Victoria.[[194]](#footnote-195) The ensuing loss of life and property was unimaginable. Story-telling was a vital part of the recovery process. The Big Stories, Small Towns initiative worked with the community to record stories and histories.[[195]](#footnote-196) In another initiative, every week in the aftermath, people came together through the Letterbox project to share stories and listen to others. The letterboxes are sacred to Strathewen as a reminder of Black Saturday but also representing hope and renewal.[[196]](#footnote-197) Academics Margaret Fraser, Kate Douglas and Elisabeth Whitley have also written about working with communities to collect oral histories as part of the project.[[197]](#footnote-198)

The Former Cockatoo Kindergarten (VHR H2303) is an example of a property added to the Victorian Heritage Register (VHR) in commemoration of its role as a place of refuge for the community during the 1983 Ash Wednesday bushfires.

There is clearly more to learn about the role of cultural heritage in recovery, through practices such as oral history and storytelling, but also understanding the stories of place that have been lost, and how those stories might shape the future design of places. Cultural heritage is also relevant to future resilience – ensuring that the design and location of new buildings and facilities learns from past knowledge. 

Figure 19 Iron Kettle, Strathewen 7 Feb 2009 (Museums Victoria)

# Chapter 4: heritage and the arts

**Caring for heritage can also have cultural value through the role that heritage can play in the arts, culture and creativity including architecture and new design.**

This section explores the role of heritage in the arts through three topics – storytelling, inspiring creative practice and the creative industries. Whilst the contribution to creativity might be one of the social benefits of cultural heritage assets and activities, we have added a separate chapter on the role of heritage in the arts, because heritage is so often implicit rather than explicit in policies for arts and culture.

‘Revive’, Australia’s new National Cultural Policy, sets policy for the creative and cultural industries. The policy explicitly considers cultural heritage in part by the emphasis it places on key aspects of cultural heritage - place and storytelling. Priority is rightly given to First Nations stories but there is also space for wider cultural heritage and infrastructure and a recognition that arts and culture are both generative (creating new works and supporting artists) and preservative (protecting heritage and conserving cultural memory).[[198]](#footnote-199)

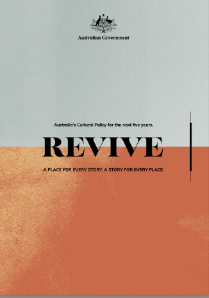


Figure 20 Cultural heritage is central to Australia's cultural policy.

The role of cultural heritage is less obvious in Creative State Strategy 2025, the Victorian Creative Industries strategy designed to, ‘create jobs and skills, and to maintain Victoria’s reputation as a global cultural destination and a bold creative leader’.[[199]](#footnote-200) It aims to support 60,000 creative artists over the next four years and position the creative industries as a driver for the State’s future economic prosperity and social wellbeing. Although the strategy emphasises the role of Aboriginal culture and notes the unique and collective cultures of diverse communities, the phrase ‘cultural heritage’ is not used.

We have not yet identified systematic research relating to heritage and the arts, apart from the significant body of research for England on the link between heritage buildings and creative industries (see below), so this section mainly relies on data, case studies and illustrative examples that show how heritage can contribute to creative and arts policy objectives. Other chapters show how heritage can contribute to wider creative policy outcomes including learning (Chapter 1) and the workforce (Chapter 5).

## Heritage and storytelling

The first, most important, and often overlooked role of heritage in culture and creativity is the role of heritage in storytelling – a topic that is central to Australia’s new cultural policy. Stories connect us with the world and help us make sense of it. Storytelling is one of the oldest traditions in the world; it also has a powerful impact on how people see themselves. Story telling can also play a role in healing.

Storytelling is central to cultural heritage. Heritage places and objects are sources of stories, through narratives embedded in their physical fabric including untold stories, and stories that might not be reflected in written or historical accounts. In addition heritage activities, such as engaging with heritage through research, public programming, interpretation and involving communities, are often all about generating stories that help us make sense of the world.

The Victorian Collections site mentioned in Chapter 1, tells some of the rich cultural heritage stories for Victoria based on the thousands of objects in heritage museums and archives.



Figure 21 Archaeology is a powerful source of storytelling.

Archaeology is one of the key techniques for unlocking the creative or storytelling value of heritage, by enabling us to read the stories embedded in the fabric of buildings, places and landscapes. The heritage permit system often results in the loss of archaeological deposits to facilitate new development, but one of the ways of mitigating that loss is through recording, analysing and telling the stories embedded in those remains.

**HERITAGE IN RUINS – MELBOURNE’S BURIED BLOCKS**

An excavation of Little Lonsdale Street in Melbourne in 2017, on the lands of the Wurundjeri Woi-Wurrung people, unearthed material from below the streets of Melbourne that revealed how, in the 1850s, the City of Melbourne raised the street levels to deal with the urban challenges of flooding and sanitation. This shed light on a major civic works program that was largely forgotten.[[200]](#footnote-201) It is worth noting that projects such as this also has the potential to help us understand current and future urban challenges, particularly in relation to climate change.



Figure 22 Melbourne's Buried Blocks (Extent)

The power and role of storytelling is also central to Aboriginal and Torres Strait Islander people. Yarning and yarning circles (dialogue circles) have been used by Indigenous communities around the world for centuries to learn from a group, to build respectful relationships and to preserve and pass on cultural knowledge.[[201]](#footnote-202)

Yarning is important in health contexts. For example, Yarning Safe ‘n Strong is a free and confidential service provided by the Victorian Aboriginal Health Service to people who need to have a yarn about their wellbeing. They offer social and emotional wellbeing, financial wellbeing and medical support. [[202]](#footnote-203)

Yarning is emerging as an important part of heritage practice. The ‘Our Knowledge, Our Way’ guidelines published by CSIRO note that researchers and policy makers tasked with solving major environmental problems, are noticing the benefits of Indigenous people applying their knowledge and cultural practices to environmental issues. Our Knowledge Our Way gives voice to Indigenous land and sea managers who have found good ways to strengthen their knowledge and build partnerships in caring for Country.[[203]](#footnote-204) The guide notes that:

‘listening and talking to and with Country is an important part of our caring for Country…. Deep listening, also called dadirri, a word from the Ngan’gikurunggurr and Ngen’giwumirri languages of people of the Daly River region is an important part of that. Slowing down and listening to Country is part and parcel of finding ways to work with Country’.

Whilst there are many benefits to protecting and engaging with cultural heritage, cultural heritage can be contested, and difficult. Decisions about what to protect and how to protect can be affected by our own cultural values, including the stories that we choose not to see or not to tell. The recent protests around statues of notable figures with connections to, for example, slavery or colonial settlement, and the pressure to return objects to communities of origin have highlighted the contested and conflicting nature of heritage.

However, the role of heritage in story telling also has the power to create spaces for reconciliation and acknowledgement. The recent Difficult Conversations project conducted by the University of Canberra in collaboration with the Ulster University in Belfast, brought together artists and heritage practitioners and drew on Aboriginal experiences and storytelling to explore the ways in which creative practices and storytelling could help to address concepts of reconciliation and healing following difficult historical events.[[204]](#footnote-205)

In Victoria, the Abbotsford Convent project (see above) also acknowledges the stories and experiences of the women and girls who stayed there.

## Heritage and creative practice

Many artists are inspired by their culture and heritage, as a core part of their creative practice. This includes the role of cultural heritage in new design and the role of cultural heritage in other creative practice including sculpture, painting and performance.

This is perhaps most apparent in architecture. The 2022 Victorian Architecture awards honour architects whose creative designs. These include the firms KTA and BVN for their work on Queen and Collins, a historic bank complex, and the award to Object 07 by Prior Barraclough, a creative engagement with elements of a historic building.[[205]](#footnote-206)

Architects and urban planners are increasingly embracing the principles of Designing for Country, that embed Aboriginal cultural thinking and philosophy into the design of new places. [[206]](#footnote-207)

At the Victorian architects’ awards, the regional prize was awarded to Noxon Giffen architects for their new campsites on the Grampians trail, shaped by close working with Aboriginal groups to understand the relationship between place, design and Country.

The National Trust of Australia (Victoria) have historically run an annual heritage award programe that has recognised excellence in the adaptive reuse of heritage, heritage innovations and new works at historic places. These have recognised the work of owners, architects and others.

The artist and businessman Mark Wang (see Chapter 3) also talks about the role of creativity and arts practice in the Museum of Chinese Australian history. He described a contemporary exhibition of works by Chinese, Chinese Australian and Australian artists, taking historical aspects of Chinatown as part of how they interpreted the relationship between China and Australia. The exhibition attracted a very different audience to the usual museum exhibition. Speaking about cultural heritage and art, Wang notes that,

‘arts actually provided a way of engaging people in an enquiring way. Whereas sometimes heritage doesn’t ask the question, it states the answer…whereas arts are a more creative way of looking at heritage. That’s what’s quite refreshing when you get an exhibition looking at cultural heritage that’s also an arts exhibition.’[[207]](#footnote-208)

The link between cultural heritage and art practice is also clearly articulated by leading Victorian Aboriginal artists.

Indigenous master weaver Glenda Nichols’s major work Miwi Milloo or Good Spirit of the Murray River was placed in the main hall of the National Gallery of Victoria as part of its triennial exhibition. The huge white net was created drawing on intangible heritage traditions of feather craft and traditional weaving that Nichols learned from her mother and grandmother. Through her art, Nicholls seeks to preserve those cultural practices.[[208]](#footnote-209) Senior Curator Maree Clarke, a Mutti Mutti/Yorta Yorta and Boon Wurrung/Wemba Wemba woman from northeast Victoria is both a leading promoter of Aboriginal arts, and an artist in her own right, who has researched the links between cultural heritage, place and identity. She works with Elders and other groups to rediscover traditional practices, but also uses those practices and knowledge to create contemporary art works. As the Birrarung Gallery website notes,

‘the capacity for art to enable people to reconnect with their cultural heritage and to assist their recovery remains central to Maree’s philosophy concerning the power of art to heal and inspire people to positively identify with their Aboriginality.’[[209]](#footnote-210)

Cultural heritage assets can also create spaces for contemporary art works and exhibitions, and often provide support to artists through for example artist-in-residency programs. For example, the team from Working Heritage and Monash Design and Architecture worked with the local community to pilot an artist residence, studio and accommodation of the site, as the basis for an artist-in-residence program.[[210]](#footnote-211)

The **Royal Exhibition Building in Melbourne** is the world’s oldest remaining Great Exhibition hall, and is now a UNESCO World Heritage site. Built for the 1880 Melbourne International Exhibition, it brought cultures, technology and ideas from around the world to Melbourne. It has continued to host programs, events, festivals and exhibitions since then, as well as to service as makeshift hospital and morgue, migrant reception centre. Today it continues to host cultural and creative events, such as the Melbourne Fashion Festival.

Apart from case studies and examples, this review has not so far identified any systematic studies or research into the links between creative practice and cultural heritage. However, one example from England is the evaluation of the Young Musicians for Heritage Project which used music and creativity as a way to explore the cultural heritage of Crewe. The researchers explored the role of the project in enhancing wellbeing outcomes for young people as part of wider thinking about the role of creativity.

There is also a huge body of research on the value of culture and the arts more generally, much of which is gathered on the websites noted in Annex 5.

## Heritage and the creative industries

There is empirical evidence for that connects historic sites and buildings with the performance of creative industries. In their review of Victorian heritage grants, SKM noted the link between creativity and economic development, citing Richard Florida’s work on the creative industries.[[211]](#footnote-212) Creative people are a key element in attracting and retaining businesses, and on this basis, cities and regions needed to attract creative businesses.[[212]](#footnote-213)

The term ‘creative industries’ emerged in the late 1990s with government policies linked to regenerating run-down places. In England, local governments sought to support ‘creative clusters’ which brought together cultural producers.[[213]](#footnote-214)

In Australia, the creative industries (including heritage) contributed $115.2 billion to the economy in 2017-18. This represents around 6.3% of Australia’s GDP – a 34% increase over the previous decade.[[214]](#footnote-215)

Creative State Strategy 2025 is the Victorian government’s four-year creative industries strategy designed to grow jobs and skills, and maintain Victoria’s reputation as a global cultural destination and bold creative leader.[[215]](#footnote-216) Although the current Victorian Creative Industries strategy does not specifically mention heritage, it does make the link between investing in cultural infrastructure projects as part of the Victorian Visitor Economy Recovery and Reform Plan.[[216]](#footnote-217) That plan includes dedicated funding for First Peoples projects and investing in ‘creative neighbourhoods’. The plan includes investment in cultural heritage facilities such as the Castlemaine Goods Shed, in new museum exhibitions and programs and in providing arts and cultural experiences to schools.[[217]](#footnote-218)

Victoria has four UNESCO Creative cities - Ballarat, Bendigo, Geelong and Melbourne – all places with significant cultural heritage. The UNESCO Creative Cities network (UCCN) was created in 2004 to improve cooperation with and among cities that have identified creativity as a strategic factor for sustainable urban development. They share the common objective of placing creativity and cultural industries at the heart of development plans at a local level.[[218]](#footnote-219)

There are many examples of creative industries in historic buildings and sites in Victoria.

**Abbotsford Convent** on the land of the Wurundjeri Woi-wurrung people of the Kulin Nation, was established in 1863. It was both a place for shelter food and education for girls and women, but also a place of hardship and ordeal. The precinct is inscribed on the National Heritage List. A local community campaign, objecting to a proposal for 289 apartments on the site, the site was gifted to the community and since then the foundation and its partners have been restoring and conserving the buildings and sharing the sites social history.[[219]](#footnote-220) Today it is Australia’s largest multi-arts precinct which provides events, spaces for artists, exhibitions, markets and festivals. Despite the impact of the pandemic the 2021 annual report notes that they welcomed 427,714 visitors, 52% of pre-pandemic levels and supported 127 independent artists, as well as creating a new venue. 3000 people attended markets and fairs and 1901 children attended convent kids programs. There was a growth in corporate events and new monthly donors and 96% tenant occupancy.[[220]](#footnote-221)

As well as the Abbotsford Convent site mentioned above, one of the most successful projects in terms of encouraging creative industries is **Collingwood Yards** on the land of the Wurundjeri Woi-wurrung people - a not for profit creative precinct and home to hundreds of artists and creative workers, including 50 organisations and artists’ studios. Based at the former Collingwood Technical School Campus with a long Aboriginal history, the site also includes historic buildings that were previously a courthouse (1853), Council Chambers (1860 and a school of design (1871). The buildings are now managed by Contemporary Arts Precincts in Trust for the people of Victoria.[[221]](#footnote-222)



Figure 23 Collingwood Yards



Figure 24 Keith Haring Mural, Collingwood Yards

Over the past decade, there has been a lot of research interest in links between heritage, placemaking, creativity and economic performance, mainly in England. The aim has been to understand more about the profile and nature of creative industries in historic areas, and the various factors behind their success (or not). It includes work to understand the drivers and motivations for creative businesses. Given the importance of creative industries to Victoria, this might be an area to explore locally.

For example, there is evidence that places with strong historic character also tend to be places where independent business, particularly in leisure, retail and cultural industries, prefer to locate. The 2013 ‘New Ideas need Old Buildings’ report looked at business occupation of historic buildings. The report estimated that the 130,000 businesses in listed premises in England contribute around £47billion to UK GDP and employ around 1.4m people. They estimate that there is a heritage premium and additional GVA of £13,000 (4.4%) above average per business in a historic building.[[222]](#footnote-223)

A 2016 Case review on the role of culture and sport on place shaping focussed on links between culture, sport and heritage assets and investment, local economic performance and more specifically creative industries.[[223]](#footnote-224)

Frontier Economics looked at the role of heritage and arts in economic productivity in England. Although it was difficult to find a direct connection, there is evidence that historic buildings stimulate productivity in the creative industries and, to a lesser extent, the wider economy. In a rapid evidence assessment of the drivers of productivity in the arts, heritage and museums sector (including a critical review of 50 research papers and stakeholder interviews) they found a lack of evidence of the drivers of productivity within heritage arts and museums, possibly because of the difficulty of measuring efficiency, but did find evidence to suggest that these sectors stimulate productivity drivers in the creative industries and to a lesser extent the wider economy.[[224]](#footnote-225)

A 2018 survey of commercial operations in listed buildings in 55 English towns identified c.142,000 town centre-type commercial operations in listed buildings in England.[[225]](#footnote-226) Comparing the use of listed and non-listed buildings, the study found that:

* independent non branded operations form a larger proportion of retail and food and beverage buildings occupying listed buildings,
* comparison retailers (largely independent) form a much higher proportion of operations in places with a high heritage density, particularly shops selling fashion,
* a fashion boutique is almost twice as likely to be in a listed building than in a non-listed building in central London,
* places with groups of listed buildings attract specialist shops, typically co-existing with places to eat and drink,
* heritage environments nurture leisure quarters – places to eat and drink from a much larger proportion of occupiers of listed buildings than non-listed buildings in the centres of the main regional cities, in smaller towns and outlying parts of London,
* creative industries are more likely to locate in listed buildings in the main regional cities and towns, and
* non-professional services have a much lower propensity to occupy listed buildings.

They also looked at the relationship between creative businesses and conservation areas by using data on the top 300 creative industries, data on the 9500 conservation areas in England and on listed buildings in commercial use.[[226]](#footnote-227) Around 26% of all companies involved in creative industries were in conservation areas, comprising c67,000 companies with around half a million people working in them and a GVA of $22-25 billon. Creative industries cluster in conservation areas; 75% of all companies in the creative industries are in the 20% of conservation areas that form the greatest clusters of creative industries. They also found that businesses of similar type cluster in conservation areas.

More detailed studies looked at whether creative clusters were the result of market forces or whether the public sector play an active role. They found that in London at least, the public sector did play a key role by preventing the demolition of historic buildings and investment in the public realm through campaigning by activities in the 70s and 80.

The research casts light on the drivers for creative industries. For example, large creative industry clusters can also be the result of the work of determined entrepreneurs who realise the potential of former industrial or warehouse buildings e.g. Custard factory in Birmingham and Tobacco factory in Bristol. Rent is not necessarily the issue for creative industries. Instead, many companies are young and ambitious and want high quality workspace with comfortable conditions and superfast broadband. They like to be close to city centres and transport hubs. They often choose space in historic buildings restored with panache because it fits their self-image and the image they wish to project to customers and staff.

In terms of the lessons of that work for the heritage sector, Historic England concluded that creative industries were an important economic sector with the potential to underpin regeneration work in historic townscapes, because creative industries both valued the physical aspects of historic buildings as well as their ambience and cultural and historical stories.[[227]](#footnote-228)

The cost of bringing older buildings into use was likely to require subsidy, but the significant reduction of public sector funding made this difficult. Despite grant assistance, developers were not always willing to take on difficult buildings.

The challenge was also not so much about using historic buildings but creating an entire environment that was conducive to the individuals and organisations in creative industries. They concluded that whilst it was rare for historic buildings or areas to be subject to wholescale development, that the emergence of buzzing, new, mixed-use creative hubs was at risk from monocultural residential or retail developments driven by higher returns, which reflected the increasing dominance of private rather than public investment. It concluded that,

‘prioritising short-term economic development over the conservation of historic environments can be a costly mistake, resulting in the loss of potential long-term economic assets as well as irreplaceable historic assets’.[[228]](#footnote-229)

# Chapter 5: heritage and prosperity

***This chapter reviews the evidence from recent studies for the role of cultural heritage assets and activities in economic prosperity.***

This chapter touches on some of the more strategic modelling for the Total Economic Value (TEV) of heritage in Victoria or Australia and evidence from international studies for the value of the sector. [[229]](#footnote-230) It notes the findings from studies on the relationship between heritage listing and property sale prices in Victoria as this is a concern that arises in panel reports, particularly in relation to Heritage Overlays. The chapter briefly explores the Victorian concept of ‘reasonable or economic use’ in heritage permits and how it is assessed because this is an important tool for reconciling economic and heritage issues. This chapter also reviews evidence for the role of cultural heritage in tourism or the visitor economy in the state, and what we know about the heritage sector as an employer.

Note that other chapters of this report also refer to economic research. For example, chapter 2 mentions the monetary value of reducing carbon emissions through retrofitting, and Annex 4 includes data on Australians’ willingness to pay for stronger heritage protection. The research on the creative industries in chapter 4 also draws on economic approaches. This is because economic research ***methods*** can be used to express the social, environmental or even cultural value of heritage in monetary terms.

**Background**

***This section notes previous studies on the economics of cultural heritage in Australia and internationally. It refers the reader to other studies that explain the application of economic research concepts and methods in heritage practice.***

There has been a long-standing interest in economic aspects of cultural heritage amongst Australian heritage policymakers. In 1982 the Centre for Resource and Environmental Studies published an evaluation of economic incentives for heritage conservation in Australia (Chisolm and Reynolds 1982).[[230]](#footnote-231) Australia’s first conference on heritage economics was held in 2000 (AHC 2000) whilst the 30th Annual Conference of the ANZRSAI in 2006 focused on heritage and regional development.[[231]](#footnote-232) In 2006 The Productivity Commission explored the case for government intervention in cultural heritage in Australia in economic terms.[[232]](#footnote-233) Since then, many more studies have used econometric methods such as choice modelling or direct benefit studies to express the wider value of cultural heritage, including social, cultural and environmental values in dollar terms.

A recent summary of some of the most relevant studies for Victoria can be found in the 2018 SGS Economics & Planning Report, ‘Valuing Victoria’s Heritage’ and in the earlier 2007 review by SKM.[[233]](#footnote-234) The SKM project included a literature review and two up-to-date choice modelling studies including one based on asset types (see Annex 4). SGS have also provided a recent review of the economic value of heritage to the City of Adelaide.[[234]](#footnote-235)

Further studies and literature reviews for Australia are set out in Annex 4. The Annex flags some of the international research, including a meta-review of 184 economic valuation studies for heritage by Simmetrica Jacobs. That and other studies around the economic value of heritage have been part of an important Cultural and Heritage Capital project led by DCMS. The Culture and Heritage Capital project is seeking to explore the models of natural capital accounting currently being applied in Australia and elsewhere to natural heritage to cultural heritage. We return to this issue in the Epilogue.

Historic England have also published a recent summary of research on heritage and the economy for England that also refers to work on property values, the Total Economic Value of the sector and tourism (see Annex 5).



Figure 25 Heritage and the economy, Historic England 2019

Note that we are heritage specialists and not economists and so not qualified to comment on the robustness of the evidence cited in this chapter, or the choice and validity of research methods. We would refer to the SKM 2018 report which includes a useful overview of the application of different economic research approaches to cultural heritage, an introduction to the concepts of use and non-use values, and an overview of the variety of methods that have been used for cultural heritage, including choice modelling and hedonic pricing.[[235]](#footnote-236) That report also includes an informed critique of some of the limitations of that work, which is particularly helpful for non-specialists.

David Throsby also provides useful introductions to economic methods for cultural heritage.[[236]](#footnote-237) Annex A of the Place Economics Calgary study also includes a recent Background and Best Practices review for heritage valuations focussed on commercial streets conducted by North American municipalities which includes a wider range of economic valuation approaches.[[237]](#footnote-238)

## Heritage and property sale prices

***This section reviews evidence for the impact of heritage protection on property sale prices.***

One aspect of the economic value of heritage is the economic benefit (or not) of a heritage listed property. The question of the impact of a heritage protection on the potential sale price of commercial or residential property prices has been raised repeatedly in Australia and internationally, often by owners or potential investors.

As noted above, in Victoria there are often objections to heritage overlays on economic grounds. This is confirmed in the Victorian Local Heritage Study where workshop participants felt that some members of the public:

‘saw the HO in a negative light, believing it to prevent development or changes to a property, reduce property value and add unnecessary expense, both in applying for a planning permit and increased insurance premiums’.[[238]](#footnote-239)

As well as not being clear that these are simply the first step of a two-step process, those objections are often based on assumptions about a potential future impact on price, rather than empirical evidence. The fact that such concerns are long standing and pervasive may be one reason why there have been so many studies looking at the relationship heritage protection and property price in Victoria, for Australia and internationally.

It is not the remit of this study to undertake new primary research and nor are we qualified to do so. Therefore, we have simply identified some of the recent studies on the relationship between heritage protection and property valuation and note the conclusions of others.

Those studies include commercial and residential properties and use a range of different research methods including:

* attitudinal surveys of real estate agents or homeowners,
* reviews of actual sales data,
* more sophisticated hedonic price modelling that refines sales data by looking at characteristics (such as land size, number of bedrooms etc), and
* ‘difference in difference’ modelling that, for example, compares prices of the same property before and after listing.

The studies look at data for listed and unlisted properties, properties in historic and non-historic districts, and properties that are near listed buildings.

The key literature reviews for the state of Victoria are summarised in Annex 4. These include a 2001 review of data Heritage Listing and Property Valuations in Victoria and the 2007 SKM review of property price studies as part of a review of grants.[[239]](#footnote-240) It also includes Appendix C of the 2018 SGS study on the value of built heritage to Victoria reviews studies that apply economic methods to valuing heritage, including references to some of the key Australian property price studies.[[240]](#footnote-241) For Australia, Urban Consulting Group reviewed prices studies in 1995, whilst the 2006 Productivity Commission review included Australian price studies.[[241]](#footnote-242) In 2007 Isles systematically reviewed 33 Australian studies.[[242]](#footnote-243) Armitage and Irons reviewed key domestic and international studies in 2005 and 2013.[[243]](#footnote-244)

The key individual property price studies for Victoria include a study of the prices of all properties on the VHR by the Victorian Valuer-General; a study of properties in Maldon by Countrywide Valuers in 1992, a study of properties in Geelong and a study of properties in the cities of Stonnington and Monash.[[244]](#footnote-245) The 2006 SKM review of the value of heritage for the City of Ballarat included a price study.[[245]](#footnote-246) More recent Victorian studies include Shehata 2020.[[246]](#footnote-247)

Empirical studies for other States include Allen 2006, Penfold 1994 and Jefferies 2012 for NSW.[[247]](#footnote-248) SGS reviewed the values of listed and non-listed buildings in Adelaide in 2017 as part of a wider value of heritage study and NSW Heritage have recently commissioned work.[[248]](#footnote-249)

The 2001 HCV review concluded that myriad factors affect property prices and it can be difficult to separate the influence of heritage controls from other factors.[[249]](#footnote-250) Buildings on the VHR were often of a high quality for which people were prepared to pay a premium. They found that generally, heritage registration did not affect property values for residential buildings. However, there could be a diminution of value due to uncertainty about the outcome of listing, of wider factors around the property market and potentially where the value of a property relates to the land value alone, or where people have purchased a property with the intent of developing it and subsequent heritage controls limit that potential. They did note at the time however that heritage listing did affect non-residential buildings.[[250]](#footnote-251)

In a summary of the 2006 City of Ballarat work, David Cottrell of SKM noted that listed residential buildings are not unduly affected by heritage protection and many in Ballarat are positively affected.[[251]](#footnote-252) However, he also notes that the studies on commercial properties have been more equivocal. However, the key differences are that:

‘where properties are owned for residential purposes only any financial return on investment will be observed as capital appreciation over time. Commercial property owners however are required to gain maximum use of their land and buildings in order to generate not just capital returns but other income streams as well….in these circumstances heritage listing may affect the owner’s ability to gain full economic from the building and land.’ [[252]](#footnote-253)

In their 2007 review of Victorian grant schemes, SKM also looked at the property price studies, noting that heritage listing does not usually affect property values with residential properties often commanding a premium, and that properties that are part of a precinct are likely to be valued more highly than similar stand-alone properties.[[253]](#footnote-254)

Australian academics Armitage and Irons reviewed the evidence again in 2013 and concluded that,

‘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 listing (i.e. the impact has been neutral or positive).’[[254]](#footnote-255)

Since then, more local and international studies have sought to refine the methods to provide more accurate comparisons.

One of leading consultancies in this field is PlaceEconomics led lead by property specialist Don Rypkema. The firm undertakes a wide range of different types of economic studies including price studies. For example, a recent report looked at the impact of landmarking on property prices in Palm Beach, Florida, USA. The report concludes that:

The historic landmarked properties of **Palm Beach** set a high standard for beauty, quality, character, design, and stewardship. This study was commissioned by the Preservation Foundation of Palm Beach primarily to determine if landmarking has an adverse impact on property values. The big news is that this analysis found that landmarking had no negative impact on property values, either in current values, value change over time, value change following designation, or when accounting for differences in age, condition, size, water access, or location. Not only does landmarking not reduce property values, but landmarked properties also experience greater rates of value increase than do non-landmarked properties.[[255]](#footnote-256)

Not all studies are positive. The SGS review of listed and unlisted buildings for the City of Adelaide between 2000 and 2017 did not provide conclusive evidence of either positive or negative impacts.[[256]](#footnote-257) However, this is a complex field of research with many methodological challenges. In NSW Jefferies notes that many studies do not compare the same property before and after listing (difference in difference approaches) or sufficiently correct for location, and studies don’t always look at the impact on neighbouring properties.[[257]](#footnote-258)

A recent study of redevelopment of the former Pentridge Prison illustrates the challenges in finding a simple correlation between heritage listing and subsequent property prices.

Waled Shehata et al used statistical analysis to understand the impact of proximity to old prisons on property prices, using the redevelopment of **HM Prison Pentridge in Coburg** as a case study. They were interested in whether proximity to ‘dark’ or contested heritage sites with a difficult history might impact negatively on property prices. Many prisons around the world, including for example Oxford Prison, have been redeveloped for housing, retail, hotel or other uses. Pentridge is now a mixed-use precinct with retail and housing. Many of the complex’s historic buildings have been altered, while new built form of significant scale has also been developed on the site. The study looked at sales between 2015 and 2019 (after the gaol had been decommissioned) – a sample of 490 houses and 359 units within 1400m of the boundary. Shehata found that in fact there was not a simple correlation – both units and houses close to the former prison achieved lower prices than the average for the area but properties between 400 and 1400m achieved a positive price effect.[[258]](#footnote-259)

The conclusion is that on the whole, property prices are not negatively affected by heritage listing, and some studies find that there is a heritage premium. Overall, listed properties attract higher prices than unlisted properties, and houses in heritage districts achieve higher prices than non-heritage districts, but if that data is refined to consider other factors such as the impact of location, then the difference may be smaller or negligible.

**The cost of neglect**

***This section notes that the quality of an area, including whether buildings are run down – can impact on property prices.***

Although heritage registration may not have a significant impact on property prices, property prices may be affected by the quality of the area including whether buildings are in a state of disrepair.

This is one of the reasons behind local bylaws to ensure people maintain their buildings. For example, in Victoria, Bylaw 13 of the Geelong Neighbourhood Local Amenity Law requires owners to take reasonable steps to prevent properties falling into disrepair and imposes ongoing monthly fines for breaches.[[259]](#footnote-260) This recognises that any building that falls into disrepair can impact on the amenity of others in the area, not simply heritage buildings.

This is not just a heritage issue. Run down, neglected or badly maintained structures can fall into disrepair, reduce neighbouring property values, encourage unauthorised occupation, attract anti-social or criminal behaviour, and reduce community perceptions of amenity and safety. As Chapter 3 notes, poorly maintained and run down places can also impact on people’s sense of pride and civic engagement.

Choice modelling studies, such as the work by SGS/Survey engine for Victoria have shown that the condition of a property affects people’s willingness to pay to conserve it; people were willing to pay more to conserve properties in good condition than properties in poor condition.[[260]](#footnote-261)

This is also reflected in property price studies. Studies that look at the link between heritage protection and property values have noted that whilst there may be a premium on properties in historic areas, that premium falls if the conservation area is deemed to be ‘at risk’. In the UK there is a 9% premium on properties in conservation areas but this advantage falls by 4-5% in conservation areas that are classified by local authorities as being ‘at risk’. This evidence is based on a hedonic model analysing over 1m house sales between 1995 and 2010 controlling for location, property features and other factors.[[261]](#footnote-262)

Rundown or uncared for places can also impact on the sense of place attachment noted in Chapter 3. The three things British people consider most important in making a local area beautiful are less litter, less vandalism, reduced graffiti and crime and fewer run-down buildings.[[262]](#footnote-263)

## Reasonable or economic use

Applicants regularly make economic arguments for the demolition of, or major alterations to, heritage listed places. While, under the provisions of the Planning Scheme, the economic impact of a permit decision is not a relevant heritage consideration in Victoria, at a state level the Heritage Act 2017 does require the Executive Director, Heritage Victoria to consider the impact of refusal on the ‘reasonable or economic use’ of a place.[[263]](#footnote-264)

Impact on reasonable economic use has been a factor in several permit appeals that have come before the Heritage Council’s permits committee. In the decision on the Windsor Hotel, analyses of the impact of refusal (in this case a condition reducing the size of the development) on the economic viability of the project were provided by both Heritage Victoria and the appellant (Hotel Windsor, P15781, 2010). The key question was whether the impact of refusal (in this case a condition) on reasonable economic use outweighed the negative impact of the proposal on cultural significance. In conclusion the Committee did not feel that the net adverse effect on cultural heritage significance was outweighed or balanced by factors relating to reasonable economic use.[[264]](#footnote-265)

Since then, Heritage Victoria has provided guidance on reasonable or economic use, as a factor in the refusal of heritage permits. The guidance identifies some principles and key considerations but does not provide guidance on methodologies.[[265]](#footnote-266)

The policy identifies ‘Reasonable’ and ‘economic‘ use as two distinct concepts.

Reasonable use is a use that can continue for the medium to long-term, mitigating the possibility of continual changes. This recognises that the historic use of a property may be obsolete (such as a redundant industrial complex) and so it may be appropriate to upgrade the property to accommodate a new use. Pursuant to the policy:

Economic use is an additional (or alternative) consideration. Economic use is broadly concerned with the ongoing economic functioning of the property. Proposed works should help the place to be economically sustainable. An economic use should generate the income necessary to cover the cost of conservation and maintenance, rates and land tax, and capital improvements to allow continued use (including reasonable debt repayment and interest costs).

If the permit applicant contends that future economic use would be affected by refusal, the applicant may be required by the Executive Director to provide relevant information to support the contention, which can include evidence of forecasted economic impact and modelling.

There are examples in practice of the use of forecasted economic impact and modelling to help inform heritage approvals. The approach involves modelling the likely costs and commercial returns on different design options for the future of a building, taking into account the anticipated costs of conservation and upgrading.

The issues of whether a potentially adverse effect on cultural significance might be outweighed by economic considerations is not a new issue. The Historic England guidance on Enabling Development addresses a similar issue. Enabling development is development that would be unacceptable in planning terms but for the fact that it would bring heritage benefits sufficient to justify it being carried out. The question here is whether heritage benefits outweigh planning disbenefits. The guidance describes the key issues to be addressed in the development appraisal including a justification that the amount of additional development is the minimum needed to meet the conservation deficit.[[266]](#footnote-267)

In conclusion, the heritage permit process often involves balancing or reconciling issues of cultural significance and questions of economic viability. However much of the modelling that underpins such cases may be deemed ‘commercial in confidence’ so is hard to access. The Victorian guidance on reasonable or economic use sets some important policy principles, but this review has not identified more systematic research or guidance on how ‘economic use’ in particular might be modelled in Victoria and this may be a research gap to consider in future (see Chapter 6).

## Heritage and the visitor economy

***This section reviews some of the published evidence for the role of heritage in the Victorian visitor economy.***

One of the ways in which cultural heritage can contribute to the economy is through the role of heritage activities and assets in tourism, or the ‘visitor economy’. This section notes the policy context for tourism in Victoria and highlights some of the existing data for the role of heritage in this sector.

SGS note that the use of heritage assets can generate direct economic benefits including increased tourism.[[267]](#footnote-268) The tourism sector plays a key role in the economy contributing to both GDP and employment. For 2021-22 tourism gross domestic product (GDP rose 26.4% to $35.1billion, representing 1.6% of economy GDP. Tourism accounts for 3.5% of the filled jobs in the whole economy.[[268]](#footnote-269)

In 2006 the Australian Productivity Commission concluded that cultural and heritage tourism in Australia was the fastest growing and highest yield sector of the tourism economy.[[269]](#footnote-270) Whilst Covid-19 may have dented progress, cultural and heritage tourism remains one of the most visible ways in which caring for cultural heritage can contribute to the economy.

Cultural heritage contributes to tourism as a driver for visitation; cultural and heritage organisations employ people and deliver services; culture and heritage can play a role in destination branding and attractiveness, and culture and heritage are often central to events which are an important tourism driver.

Australia’s tourism website highlights Australia’s historical and cultural experiences as part of the visitor offer.[[270]](#footnote-271) The most recent Tourism Research Australia report on the state of the tourism industry for 2021 quotes the Booking.com 2022 Sustainable Travel Report that finds that people are:

‘seeking authentic cultural experiences that bolster and add value back into local communities, while actively avoiding over visited destination’[[271]](#footnote-272)

The importance of culture and heritage as a driver for tourism in Victoria is reflected in the Victorian Visitor Economy Master Plan. ‘Storied culture’ is one of the three brand pillars an – the idea that Victoria is Australia’s capital of culture with a rich tapestry of stories.[[272]](#footnote-273) The draft plan notes that cultural heritage is key to this:

“Victorian arts and culture can be found in surprising places from the laneways of Melbourne to the silos of northwest Victoria. The seven strategic directions for tourism investment include Melbourne, arts and culture and First peoples.[[273]](#footnote-274)

Empirical evidence for the contribution of culture and heritage to the visitor economy and tourism in Victoria can be found in (or extrapolated from) research conducted by Tourism Research Australia into visitor satisfaction and drivers, or culture and heritage visitors. There are relatively few specific studies into heritage tourism or visitation, with the noted exception of a study of visitors to Maldon as part of a wider study that looked at heritage tourism in three Australian mining towns.[[274]](#footnote-275)

In 2008 Heritage Victoria worked with the Tourism Research Victoria to create a snapshot of the role of cultural heritage in tourism at the time. We have quoted that analysis in full here to illustrate some of the evidence for the role of heritage in tourism, but as noted below, we have not been able to update that snapshot to the present day.

**Snapshot of heritage & tourism in Victoria in 2008**[[275]](#footnote-276)

In the year ending September 2008, Victoria’s historic or heritage buildings, sites and monuments were visited by over 1.9 million visitors, comprising:

* 826,000 international visitors,
* 592,000 domestic overnight visitors, and
* 529,000 domestic day visitors.

That number of international visitors is c. 56 per cent of all international visitors for that year. The 2010 Melbourne and Victoria Brand Health survey also indicated that 16 per cent of Australians considered Victoria to be the one Australian state or territory offering the opportunity to discover unique history and heritage – equal second to New South Wales.

Tourists visiting Victorian historic or heritage buildings, sites and monuments spent approximately $2.4 billion in 2008 (15% of total tourist expenditure in Victoria). Heritage is thus a significant part of Victoria’s tourism industry, which provided a Gross Value-Added amount of $14.0 billion to Victoria’s economy and 184,800 jobs in 2007-08.

Heritage is also a particularly important drawcard for visitors to regional Victoria. The year ending September 2008 saw 251,000 international visitors and 429,000 domestic overnight visitors to historic or heritage places in regional Victoria. Surveys have indicated that large numbers of visitors’ expectation in visiting regional Victoria include a chance to experience Australia’s history – as many as 78% in the Swan Hill region. These surveys also showed that these visitors experienced very high levels of satisfaction – with between 94 and 99 per cent indicating that their expectations were met or exceeded.

**Post 2008 data on heritage and tourism in Victoria**

***It has not been possible to update this 2008 snapshot with more recent data for Victoria, so this section simply highlights more recent general data on heritage and tourism in Australia.***

In 2010 Tourism Research Australia released a snapshot of the profile of domestic and international visitors who participated in cultural and heritage activities in Australia during 2009.[[276]](#footnote-277) They defined cultural and heritage visitor as one who participated in at least one of the following activities during their trip:

* attending theatre, concerts or other performing arts,
* visit museums or art galleries,
* visit art, craft workshops or studios,
* attend festivals, fairs or cultural events,
* experience Aboriginal art, craft and cultural displays,
* visit an Aboriginal site or community,
* visit historical/heritage buildings sites or monuments.

It noted that half of all international visitors to Australia (51%) were cultural and heritage visitors. International cultural and heritage visitors spent $16 billion on trips to Australia in 2009. On average international cultural and heritage visitors spent $6280 per trip compared to other international visitors who spent on average $3832. The higher spend was most likely due to their longer average length of stay. Domestic overnight culture and heritage visitor spent $9.6 billion in 2009 – $188 per night which was higher than those not participating in culture and heritage activities Domestic culture and heritage visitors spent $1.3billion. New South Wales, Queensland and Victoria were the most popular states for domestic and international cultural and heritage visitors although proportionally participating in cultural and heritage activities was higher in the Northern Territory, the ACT and Tasmania.

As part of the Destination Visitor Program (DVS) Tourism Research Australia (TRA) profiles local visitors in partnership with local councils to assist with decision making and investment. Visitor Profile and Satisfaction (VPS) data is benchmarked. VPS benchmarks suggest that 35% of visitors expect to have experiences around arts and culture, and 48% around experiencing Australia’s history. However, that is not always an important driver. For example, a 2012 survey of 253 visitors to Marysville and Eildon in Victoria found that visitors were less likely to have expectations around arts and culture or history, but many were visiting to provide support after the bushfires.[[277]](#footnote-278)

Tourism Research Australia notes the importance of **events** as a driver for regional tourism. A 2014 survey of 2401 Australian respondents who had attended a regional event in the last two years found that for 25% of visitors to regional events, history and heritage were a reason for going to the destination, and arts and cultural attractions inspired 12% of visitors***.***[[278]](#footnote-279) Of those, 6% had attended a regional sporting event or art exhibition, 5% an agricultural event or cultural event or festival and 4% a heritage event. Visiting with children and family, and the desire to experience new things were greater drivers for historical events. Cultural events were seen as those with broad mainstream appeal driving overnight trips, whilst historical events were more likely to drive day trips.

In their latest snapshot of domestic arts and cultural visitors, TRA notes Australians took almost 15 million day trips to participate in arts and cultural activities, spending $1.9billion.[[279]](#footnote-280)Around 13% of domestic overnight visitors participated in arts and cultural activities, including visiting heritage buildings or sites. This was higher for those aged 55 years or over, friends and relatives travelling without children, people on holiday trips and interstate visitors. Trips were evenly split across capital city and regional destinations. 51% of cultural visitors attended museums and art galleries and 39% of cultural visitors attended history or heritage events and the largest spend category was food and drink with a spend of $4.7 billion.[[280]](#footnote-281)

In 2019 the TRA also looked at youth travellers. In 2019 around 15% of young travellers in Australia enjoyed arts and heritage activities. Youth travellers made 27.3million trips, spending $13 billion in 2019. They mainly travelled to visit friends and relatives and on holiday. The most popular activities were eating out (60%), visiting friends and relatives (49%) and sightseeing (23%). Popular outdoor activities included going to the beach and visiting national parks (13%) whilst arts and heritage accounted for 15% of trips.[[281]](#footnote-282)

In conclusion, culture and heritage still seems to be a factor in both domestic and international visitation in Australia, but in the absence of a post-2008 dedicated heritage snapshot broken down by state it is difficult to be more specific about the role of heritage in Victorian tourism.

## Employment in the heritage sector

***This section explores evidence for the role of heritage in supporting jobs, as another element in understanding the contribution of heritage to prosperity.***

This section discusses some of the evidence for the role of heritage in supporting jobs in Victoria. This is not straightforward as employment in heritage is spread across different economic sectors including arts and culture, construction, tourism and other areas.

Annex 1 notes that in 2019-20 around 292,000 people worked in the creative industries in Victoria – around 8.6% of the workforce.

It is not easy to identify the heritage workforce within this figure. Australian Bureau of Statistics (ABS) arts and culture data includes employment in areas such as architecture, museums and archives, libraries, nature reserves and parks but not necessarily the repair and refurbishment of older buildings or areas such as tourism. There is also a significant volunteer component who are not identified in these numbers.

In Victoria previous evaluations of heritage grant schemes set out to identify the impact on creating new jobs or retaining existing jobs. For example, the SKM review of the $16m government heritage restoration programme undertaken by Victorian government from 1994 looked at 160 structures across Victoria owned by 30 individual departments and agencies. The benefits of that funding included supporting repairs that would not otherwise have been done, preventing further deterioration, acting as a catalyst for additional funding, retaining buildings in use and improved asset management. More than 30% of funded projects result in direct job generation.[[282]](#footnote-283)

There is also evidence that investing in the refurbishment and repair of existing buildings – including heritage buildings – can create more jobs than investing in new build. In Victoria for example, alterations and refurbishment of existing residential buildings represent around 16% of construction activity.[[283]](#footnote-284) In Europe, every EU$1million invested in retrofitting existing buildings creates an average of 18 jobs. This is roughly equivalent to the number of new jobs created in innovation sectors such as biotechnology, medical equipment engineering, and high-tech manufacturing.[[284]](#footnote-285)

In the US, Don Rypkema has undertaken a series of studies that compare the creation of jobs in heritage preservation with job creation in other US industries. The basis of his argument lies in understanding the ratio between materials and labour costs in building projects. For a heritage property, the labour: material ratio is around 70:30 compared to around 50:50 for normal construction. In terms of cost, 60-70% of a refurbishment project cost is labour compared to around 50% for new construction.[[285]](#footnote-286)

As the largest funder of cultural heritage in the UK, the National Heritage Lottery Fund (NHLF) has also set out to capture the number of jobs created and retained through funding heritage. An economic impact study of 90 projects completed between 2003 and 2008 found that funding for heritage projects increases visitor related spend and creates local jobs. Across all projects HLF funding led to a 96% increase in visit related spend in local economies and created 3491 new local jobs. Together these 90 places generate nearly £130m spending for local businesses and support over 4800 local jobs.

In the UK VAT (Value Added Tax) is currently charged on repairs to buildings and not on new construction, creating a disincentive for repair and refurbishment. There has been a long campaign from the heritage sector to reverse that, supported by the Federation of Master Builders who have argued that reducing VAT on repairs could generate £15 billion in new taxes, create 95,000 jobs and unlock a £1billion green revolution. They also argue that we will need to invest in new skills to support that green revolution.

**The economic impact of heritage skills**

***As part of the discussion on the role of heritage in supporting jobs, this section notes the potential economic impact of heritage skills.***

In Australia, as elsewhere, there has been a long-standing concern about the decline in cultural heritage skills. Built environment cultural heritage skills include traditional building trades such as brickwork, carpentry, plastering and masonry, as well as the conservation of large and small technology, collections and materials. Although there have been several Australian reports around the shortage of traditional craft skills in heritage, such as the 2010 HCOANZ report (which includes a review of previous Australian studies), none of this work expresses the argument for those skills in economic terms.[[286]](#footnote-287)

Interestingly the fight against climate change has given new impetus to recognise the economic contribution of traditional skills. In the UK, a new report highlights the vital contribution historic buildings can make to the fight against climate change and focuses on the scale of the opportunity to address the skills gap to meet this challenge. More than 105,000 new workers including plumbers, electricians, carpenters and scaffolders will be needed to work on decarbonising the UKs historic buildings every year for the next three decades for the UK to meet its 2050 net zero target. Covid-19, Brexit and an ageing construction force have contributed to a skills shortage. Around 100,000 people currently work on historic buildings – up to 105,000 new workers will be needed to focus solely on upgrading buildings before 1919.[[287]](#footnote-288)

Historic England commissioned CEBR to analyse the scale and impact of the heritage sector in the UK which defined the subsectors of heritage within libraries archives and museums, in architecture and engineering, in public administration and in construction. They concluded that in the UK, the heritage sector is an important economic sector with a total GVA of £36.6 billion, providing over 563,509 jobs in 2019. That sector grew by 24% between 2011 and 2019 – outstripping the rest of the UK economy.[[288]](#footnote-289)

In conclusion, it is difficult to develop a comprehensive picture of the role of heritage assets or activities in supporting jobs in Victoria, in part because the sector is spread across different ABS areas including arts and culture, and construction. However, studies from the US and England suggests that it is possible to model the role of the sector in supporting jobs, either through comparing heritage to other industries, or through a more detailed review of the subsectors in heritage. And where that research has been done, the sector can be shown to play a significant economic role. Again, this may be a topic for future research.

## The economic impact of Covid-19

***This section notes the potential impact of Covid-19 on heritage in Victoria as an area for future research.***

One of the specific questions for this study was around the economic impact of Covid-19 on heritage. The Covid-19 pandemic has had a significant impact on the economic viability of several heritage organisations and businesses in Victoria.

The Victorian creative industries report notes that creative industries were some of the worst affected by the impact of Covid-19. Restrictions on visiting sites and public places meant that almost one in four people in the arts and recreation sectors lost their job, with younger people and women most affected. This shone a light between culture and tourism and highlighted the vulnerability of a sector dependent on audiences and visitors.

For Australia overall, tourism GDP in 2021-2 remains below the 2018-19 peak of $61.9b and 3.1% of GDP.[[289]](#footnote-290) The most recent Tourism Research Australia report on the state of the industry for 2021 notes that due to Covid-19, jobs in cultural services were down by 20% (2500 jobs) and in sport and recreation services by 12% (4300 jobs). Attendance at festivals/fairs or cultural events was down by 65% in 2021 compared to 2019 . The report identifies high spending visitors but does not disaggregate culture and heritage visitors. [[290]](#footnote-291)

Some idea of the impact of Covid-19 on the sector can be found in individual annual report for 2021-2. Victorian Heritage Registered **Puffing Billy** generated $29.19 in revenue from 487,543 visitors and contributed significantly to the townships around its stations. However, in 2021-2 it lost a total of 112 days to Covid-19 lockdowns placing a significant strain on the railway’s financial sustainability and workforce. [[291]](#footnote-292) Other sites including Sovereign Hill and Abbotsford Convent also note the impact of the pandemic on revenue and visitor numbers.



Figure 26 Puffing Billy

Covid-19 is also likely to have had other impacts on arts and culture, but this is not always easy to quantify. For example, the ABS census data reveals a decline of 19% in people who have contributed to volunteer work between 2016 and 2021 which is likely to be reflected in culture and heritage volunteering.

This data suggests that there was a decline in cultural heritage volunteering in Australia because of Covid-19. Museums Victoria for example has seen volunteering hours decline from over 43,000 in 2018-19 to just over 10,000 hours in 2020-1.[[292]](#footnote-293) Figures for the UK suggest that prior to Covid-19, cultural heritage volunteering was increasing. The 2014/15 Taking Part survey stated that 24% of respondents had volunteered their time within the last 12 months, with 7% volunteering in the heritage, museum or library sectors. This equates to approximately 3.7 million people. National Trust volunteer numbers in England, Wales and Northern Ireland have nearly doubled since 2002, increasing from 34,380 in 2002/03 to over 62,000.[[293]](#footnote-294)

Covid-19 has had a disproportionally large economic impact on digital, cultural, media and sport sectors in the UK, causing a sharp decline in revenues in part through cancelled events. Tourism and construction are a significant element of heritage output and are the industries most in jeopardy.[[294]](#footnote-295) Historic England used scenario planning models to explore the potential future impact of Covid-19 on the sector. Key factors included restrictions on travel, social distancing and households curtailing spending.[[295]](#footnote-296) A fiscal package was put in place.

In conclusion, Covid-19 has clearly had an impact on both tourism and wellbeing in Victoria, and on the viability of cultural heritage organisations. It would be useful to undertake a more systematic review of the evidence for this, in order to understand the wider social and economic impact of restricting access to heritage in Victoria.

## The Total Economic Value of heritage

***This section reviews some studies that have attempted to capture the total economic contribution of heritage, noting that there are different approaches.***

In economics, the concept of Total Economic Value (TEV) refers the value derived from people from a resource, including heritage. It is calculated using a combination of direct use values, non-use values and other values (e.g. option and existence values).[[296]](#footnote-297) This section notes some of these studies, although each uses different approaches.

In their review of the value of Victoria’s heritage, SGS estimated the value of the services provided by cultural heritage assets to the Victorian economy at $1.1 billion. This calculation was based on an asset-specific willingness-to-pay study that looked at how much Victorians were willing to pay to conserve a range of different types of cultural heritage assets, including residential, commercial, and civic places, landscapes and historic objects. At a yield of 4% this generates a flow of $40m in benefits to the community. This compares with a Heritage Victoria budget of $4.2m including staff costs, or $500,000 for the Heritage Council of Victoria.[[297]](#footnote-298)

However, they stress that this figure is based only on the willingness to pay for cultural and educational services and excludes the value of heritage to tourism and the visitor economy (see above) or for example the environmental benefits of preserving heritage (see Chapter 2). Therefore, this figure can be seen as an underestimate.

In a project for the City of Adelaide, SGS also included data on the economic impact of heritage grants in Adelaide. For Victoria, there have been several evaluations of the economic impact of heritage grant programs not all of which are still available.[[298]](#footnote-299) In their 2007 review of the Victorian heritage grants, SKM note that in 2004, Macroplan found that every dollar committed by Heritage Victoria generated$3.40 of financial benefit to the community. SKM suggested that in some cases heritage funding was a component of a larger project that might have gone ahead anyway, but even correcting for that they suggest that programs potentially leveraged restoration funding of $2.40 for every dollar invested.[[299]](#footnote-300)

The SGS valuation does not put a dollar value on the embodied energy component of existing buildings. As Chapter 2 notes, conserving existing sites and buildings can contribute to addressing climate change, and the benefits of addressing climate change can be monetised. Alternatively, there is an economic cost of doing nothing to address climate breakdown. Deloitte Access economics has estimated that the Australian economy will lose around $3.4trillion by 2070 by not addressing climate breakdown, whereas if Australia acts with the world to limit warming, then the economy could gain $680 billion by 2070.[[300]](#footnote-301)

Historic England have undertaken project to study the monetary value of carbon in pre-1919 residential buildings. The aim was to understand the total carbon emissions associated with traditional buildings and how their refurbishment could contribute to meeting the UK’s 2050 target. To do this they compared the carbon emissions of pre-1919 residential buildings in England, and their consequent monetary value in terms of caron – under a range of scenarios. If existing buildings are refurbished at 1% a year over 25 years this could save 15.5m tonnes CO2 emissions. This could result in GBP2.5billion of savings in offsetting climate change.[[301]](#footnote-302)

PlaceEconomics have undertaken a study for the City of Calgary in Canada that includes those environmental values. The team looked at four heritage commercial areas in Calgary and calculated an economic value (base value + heritage premium), a social value (based on Willingness to pay to maintain the heritage character and quality) and an environmental value (which puts a dollar value on the embodied energy in existing and replacement buildings). This approach recognised the financial, social and environmental value of the four areas at more than $900m - $231m more than just the base economic value.[[302]](#footnote-303)

Other aspects of cultural heritage can also be monetised, such as the value of intangible cultural heritage. In 2019 the Centre for Aboriginal Economic Policy research with the ANU provided a report on an approach to the potential market valuation of Indigenous Knowledge (IK) including traditional knowledge and cultural expressions for IP (intellectual property) in Australia.[[303]](#footnote-304) The aim was to identify the current and future potential market value that could be created through legislated protection measures such as patent and trademark law or design legislation (rather than copyright). The aim was to provide better protection for Indigenous knowledge and products that are not protected by copyright. One of the case studies centres on heritage protection through the Indigenous Protected Areas and associated ranger programs. The study cites work by Allen Consulting to forecast a contribution of Australian IPAs to GDP of between $275 and $512m.[[304]](#footnote-305)

Some of the evidence for the economic benefits of heritage comes from the studies on the creative industries noted in Chapter 4. One of the core economic questions is the role of culture and heritage in economic productivity. When the UK government looked at the link between heritage and productivity, they were unable to find a direct connection between cultural heritage and productivity, but they did find evidence that being in historic buildings stimulated productivity in the creative industries, and to a lesser extent the wider economy.

In conclusion, capturing the total economic value of the heritage sector remains problematic, in part because there are so many different aspects to heritage – including the contribution to tourism, construction, decarbonisation, education, creativity, place-making and knowledge as well as the direct economic value of a heritage property. SGS have taken one approach for Victoria; the PlaceEconomics triple bottom line study for Calgary (economic+ social+ environmental) is another approach.[[305]](#footnote-306) Given the challenges of understanding that wider impact, DCMS in the UK have been working towards a culture and heritage capital model, that seeks to take a more systematic approach to valuing cultural heritage, drawing on the lessons of natural capital accounting.[[306]](#footnote-307) This is discussed in more detail the epilogue and could be an area for further research in Australia.

# Chapter 6: Gaps in the evidence

***This section identifies some heritage policy research gaps for Victoria and for the sector in Australia.***

This review identifies some immediate priorities for HCV, and some topics that might benefit from a collective approach with other State heritage agencies. The Epilogue identifies four strategic underpinning heritage policy research questions that may need a collaborative approach working with universities and other government partners.

As the list of potential research questions is huge, we have focussed on public policy issues where heritage activities and assets can contribute to achieving those policy outcomes, but where that potential contribution is not well understood.

In developing this list, we have drawn on suggestions for further research in previous reviews, such as HCV 2014, which called for more work on then economic and social benefits of heritage, the sense of place and distinctiveness, attitudes to heritage and comprehensive cultural heritage and data.[[307]](#footnote-308) Many of the international studies noted here have also identified future research needs (see Annex 4).

The process of refining this list has inevitably raised much bigger questions around the role of heritage in climate change, the economy and wellbeing, that may be better addressed through wider collaborations. These are set out in the Epilogue.

Note that this list does not claim to be definitive – it simply provides some initial suggestions designed to inspire further discussion in Victoria and perhaps more widely.

## Priorities for Victoria

***This section identifies some immediate research gaps for Victoria. There may be overlaps with the next section that identifies topics that could benefit from collaboration with other heritage agencies.***

### Social and health impacts

Apart from work with Indigenous communities there is a significant lack of research into the social impacts of heritage activities and assets.

**Can we measure the health impact of engaging with cultural heritage?**

Planners, urban designers and others are increasingly using cortisol measurements to capture the impact of engaging with nature or gardening on health and wellbeing. In Australia in the cultural heritage field, this approach has also been pioneered for engaging with art at the National Gallery. There is also work underway on art and dementia.[[308]](#footnote-309) There is huge potential to apply these approaches to taking part in cultural heritage activities.

**Who is takes part in heritage activities? mapping the Victorian heritage ecosystem**

One factor behind the significant lack of research on the social impacts of heritage in Victoria is a lack of awareness of just how many people take part in heritage activities whether in their working life, as volunteers or in their personal life.

It would be helpful to map the Victorian cultural heritage ecosystem in more detail to build a greater understanding of the sector and as a foundation for future research into the economic and social benefits of heritage.[[309]](#footnote-310)

**How does heritage volunteering contribute to social capital in Victoria?**

Social capital is a consistent theme in Victorian policy making and there is international evidence for the role of cultural activities in developing social capital, including networks and connections. The stocktake (in Annex 1) shows the different ways in which people engage with heritage in Victoria including an active network of volunteers in areas such as technological heritage, but we know very little about how engaging with heritage impacts on their lives. As well as mapping the ways in which people engage with heritage in Victoria, it would be useful to understand more about their needs, interests and motivations. A study of heritage volunteering in Victoria, perhaps using the technological heritage sector, might help provide a better understanding of the social impacts of heritage activities.

### Environmental impacts

**How can we maximise the contribution of existing buildings to reducing carbon emissions from construction?**

Reducing carbon emissions from buildings is an important policy ambition for Victoria. Despite evidence for the environmental and economic benefits of repairing and retrofitting existing buildings, many energy efficiency initiatives fail to give weight to embodied energy in existing buildings. This runs the risk of unintended policy consequences that might increase carbon emissions by incentivising the demolition of existing buildings in favour of supposedly more energy efficient new ones. There is an urgent need to review the evidence for Victoria, including both the scientific and economic research, and analyse the policy barriers and opportunities for making the most of our existing building stock.

**Cultural heritage, biodiversity and ecosystem resilience**

We have not included biodiversity in this report but it is a significant gap in our understanding of the environmental impacts of cultural heritage.There is a growing awareness of the importance of Aboriginal cultural heritage expertise in achieving wider natural environmental outcomes but are there environmental benefits that emerge from other cultural heritage activities or assets?

### Creative impacts

**Heritage and the creative industries in Victoria**

Studies by Historic England and DCMS show the importance of understanding the role of historic places and buildings in supporting the creative industries. Not only does this help to understand the economic impact of heritage assets, it also helps heritage policy makers to understand the needs and interests of this sector (see below).

### Planning and place impacts

We have not suggested specific research priorities for Victoria under this heading as there are possibly more immediate priorities. Also the recommendation for further work on reasonable economic use is a planning issue, as is the recommendation for research into heritage and the creative industries (see below). The role of heritage in disaster management and resilience might possibly be better addressed in collaboration with other heritage agencies (see below).

### Economic impacts

**Update the 2008 culture and heritage tourism snapshot for Victoria (including the impact of Covid-19)**

It would be useful to have a more up to date post-Covid-19 snapshot of culture and heritage visitors to Victoria, to understand more about motivations and priorities. As noted in Chapter 5, it is not easy to isolate the role of cultural heritage in the Victorian visitor economy from more general data on Australian tourism.

As part of this work, it would also be useful to model the impact of Covid-19 on cultural heritage. The pandemic provides a case study in what happens if people are no longer able to visit heritage sites or take part in heritage activities, and thus a way of capturing that economic and social impact.

**Modelling the long-term economic benefits of conservation**

HCV has asked us to identify examples of sites or object that had been protected – often in the face of objections – which have then gone on to deliver long term benefits that had perhaps not been envisaged at the time. Examples from NSW include the Pyrmont Bridge which is now a thriving pedestrian and bike thoroughfare.

A systematic study of one key Victorian cultural heritage asset and how it has evolved over time, that sets out to perhaps monetise the longer-term impacts of conserving the site, using a triple bottom line approach could provide a methodology for anticipating future benefit in development decisions.

**Heritage protection and property prices**

This is perhaps the single most researched heritage policy topic in Australia over the past thirty years or so. Despite a relatively large literature from Australia, the US and elsewhere on the impact of heritage listing on property prices, it continues to be raised, particularly in the context of objections to Heritage Overlays.

Drawing on data from planning panel reports, we suggest that some of the concerns might arise from communication failures – especially around the understanding of how economic issues are addressed in planning and heritage permits. Some of the concerns also arise from perceptions of risk rather than the actual data.

Nevertheless, further hedonic pricing studies might be useful. Whilst one option might be for HCV to replicate an earlier study to develop trend data, it could be more useful to refine the key questions, in light of more recent studies.[[310]](#footnote-311) These should focus on the issues arising from the permitting system, and should involve discussions with property professionals, local councils and Heritage Victoria. For example

* can poor neighbouring developments affect the sale price of listed buildings (and can heritage protection actually create benefits for neighbouring properties)?
* Is there a case for heritage character-based approaches that apply to larger areas where heritage controls apply to all properties, rather than individual sites or objects?
* Do we understand enough about the impact of heritage controls on commercial properties?

**Economic modelling for heritage permits**

Under section 101 (2) (b) of the 2017 Heritage Act, Heritage Victoria needs to take economic considerations into account in heritage permits. Local councils also need to take economic and social issues into account in proposing planning scheme amendments, such as the introduction of built form controls. There may be scope to explore these issues further to provide more clarity for developers and decision makers such as:

* **developing methodologies for calculating ‘reasonable economic use’** in heritage permits. Heritage Victoria has provided guidance on reasonable economic use, and there are emerging methodologies for testing this in reviewing permit applications. Is this approach well enough understood, and do we need further guidance on methodologies?
* **capturing the social and economic effects of planning amendments** - local councils in Victoria need to consider the social and economic effects of planning amendments, which requires them to balance cultural heritage considerations with wider social and economic considerations. There is an urgent need for guidance on how best to do this including a methodology. And, given the lack of resources for most councils, what existing data can they use?

**Understanding commercial and owners’ perspectives on heritage**

It is vital to understand the perspectives of both owners, and commercial businesses who occupy heritage buildings or sites. As Annex 2 notes, there is a considerable degree of confusion about heritage issues in the planning system. Gaps include:

* learning more about the experience of **commercial businesses in heritage listed properties** – for example, do creative businesses in Victoria experience the same ‘heritage advantages’ as those in England? What motivates them to take on historic buildings and what are some of their experiences?
* understanding more about the perspectives of **property owners** – for example, is there a link in changes in land valuation for heritage assets and permit pressures?

### Maintaining the heritage stocktake

**Updating the stocktake**

It has been complex and time consuming to develop an initial heritage stocktake for non-Aboriginal cultural heritage assets and activities Victoria, and this clearly requires further work. This is in part because although there is an important review of the state of Aboriginal cultural heritage in Victoria, other cultural heritage is not consistently reported on in state level State of the Environment Reporting, or in in ABS data. However, having a heritage stocktake is critical to addressing future research gaps as it helps specialist researchers from other disciplines to understand the scope and range of heritage assets and activities in Victoria. The authors of this report strongly recommend that HCV initiate and maintain a more comprehensive heritage stocktake for Victoria, complementing the work of the VACH.

## Sector-wide priorities

***This section identifies gaps in the research that might benefit from working in collaboration with other heritage agencies.***

The focus of this report has been on research priorities for Victoria. However, in compiling this list we have identified some topics where it might be useful to have Australia-wide data, such as working with the ABS to better understand the macro-economic contribution of the heritage sector. There are also research gaps that require innovative thinking or novel approaches, that might benefit from a collective approach and shared resources, rather than individual state agencies commissioning their own studies.

### Social and health impacts

There is a considerable interest in the social impact of heritage and a dearth of general Australian research on the social impact of heritage activities and assts, or on the role of cultural heritage in physical and mental health (with the notable exception of research relating to Indigenous communities).

This is a huge subject that merges into the wider issue of heritage and wellbeing. This is a topic that could be addressed collectively by heritage agencies, but it might also benefit from working in partnership with universities and across other areas of government (see below).

**Heritage participation data**

As a basis for starting to understand the social impact of heritage, it would be useful to have a better longitudinal understanding of heritage activities across Australia, including issues such as volunteering. Heritage agencies could usefully work more closely with the ABS to identify ways to gather more systematic data for heritage participation in Australia through for example, the heritage questions in the ABS social survey.

As noted, data on Australian attitudes to heritage, including the willingness to pay for benefits to others, can be found in the Deakin studies and in subsequent work such as the SGS study for Victoria. It would be useful to keep this data up to date with regular periodic surveys to track changing attitudes and issues.

### Environmental impacts

**How can traditional building knowledge avoid maladaptation and benefit the green economy?**

The push for a ‘green economy’ creates an opportunity to create incentives to advocate for the development of traditional craft skills and knowledge. Traditional knowledge includes traditional buildings craft skills, skills in repair and maintenance, and of course traditional knowledge about the environment and land management – particularly that held by Aboriginal communities. The experience of poor retrofits or inappropriate burning techniques, suggests that traditional cultural knowledge has a role to play in addressing key issues around adapting to climate change. Although there is a renewed interest in Aboriginal land management practices, and a revived interest in mending and repairing, that has not extended to include other heritage craft skills, many of which are endangered in Australia. Research into the potential role of traditional cultural knowledge in the green economy might help to address this.

### Place based impacts

**Heritage and resilience**

Areas of Victoria – and Australia as a whole – have been devastated by recent floods and bushfires and with climate breakdown that will inevitably get worse. As well as the impact of the event itself, the loss of treasured places and objects can have a devastating and long term impact on individuals and communities. There is also often huge pressure to build back and build back quickly – raising complex issues around how best to do that. Understanding the value of what was there, what is there and what might be there is key to finding a way through a difficult process. How can heritage practices such as storytelling, cultural mapping, and working with communities play a role in the process? And what role should cultural heritage play in policies on resilience and recovery across Australia?

### Economic impacts

**The macroeconomic contribution of the cultural heritage sector in Australia**

There is an urgent need to understand the macroeconomic contribution of the cultural heritage sector to the economy in Australia.

SGS have calculated the contribution of heritage to the Victorian economy each year but note thatomits key issues including environmental impacts and contributions to tourism. Is it possible to update that valuation to encompass those wider benefits? It would be important to work with a specialist firm to understand the feasibility of doing this, what additional data would be required to do that.

One barrier may be that ABS data on the economic impact of the cultural heritage sector in Australia is spread across the three domains of arts & culture, construction and tourism, as well as the environment, whilst cultural heritage assets and activities are often omitted from periodic reporting on statistics. It may be possible to adapt the research methodology used to address a similar issue in England, where CEBR analysed the scale and impact of the heritage sector across the subsectors of libraries archives and museums, in architecture and engineering, in public administration and in construction.[[311]](#footnote-312)

**Paying the right price – how can we reduce heritage uncertainties for developers?**

One of the biggest challenges for heritage protection is when the price paid for a property is based on an unrealistic expectation of future returns either through use or additional development. At the same time developers and investors need a degree of certainty prior to purchase. Further research on ways to provide greater certainty would be useful. For example, Historic England guidance on enabling development (development that might not be compliant with planning controls, but which enable the future conservation of a heritage assets) addresses issues such as reasonable level of development, reasonable profit and securing outcomes.[[312]](#footnote-313)

**Understanding the disincentives for heritage conservation**

One of the underlying questions is whether Australia incentivises the destruction of cultural heritage, as an inadvertent consequence of policies designed to deliver other benefits (such as growth or resource extraction). This is not unusual: the UK for example, incentivises new build over refurbishment by charging VAT on repairs to buildings and not on new construction.[[313]](#footnote-314) There has been a long debate in the Australian heritage economic literature around the need for incentives for heritage conservation but relatively little on the disincentives including issues such as taxation, building codes, insurance regimes and accounting practices.

**The economic value of heritage trades and skills**

The increasing need for skills in retrofitting existing buildings, and indeed other traditional skills such as Indigenous approaches to land management and burning, or skills in repairing, reusing and maintaining equipment and even clothing. There has long been a concern about the loss of heritage skills in Australia and elsewhere, but little success in halting that. It may be useful to explore the economic case for those skills in relation to wider issues such as decarbonisation and climate change.

### The cultural heritage policy research environment

Whilst commissioning additional research is important, it is also vital to address some critical strategic issues around the cultural heritage policy research environment. As this issue is not specific to Victoria, it might benefit from a shared approach across Australian heritage agencies.

**Publishing sector research**

One of the biggest challenges in compiling this report has been finding ‘grey’ literature – previous research studies commissioned by local, state or federal heritage or arts bodies in Australia. Several key research reports for Victoria and Australia that were available online during a prior study in 2011 were no longer available. Although some material is found on Pandora (Trove) many studies were only tracked down by word of mouth.

There is an urgent need to find and put online older studies including programme and policy evaluations, whether on government, academic or consultant websites. Three examples of good practice are public sector organisations in England (such as DCMS, Historic England and the Heritage Fund); the Manchester University Cultural Value website which guides non-specialist readers to a range of useful literature, and the private sector PlaceEconomics website from the US. It is also important that going forward new research studies are put online.

**A heritage observatory**

Victoria, in common with other Australian states, lacks comprehensive data on cultural heritage assets and activities or easy access to the latest academic or public policy research on the value of heritage.

This issue is not new. The 2006 Productivity Commission inquiry into heritage identified gaps in the data on the number quality and composition of heritage, on sources of expenditure and the effectiveness of that spending, and therefore felt unable to make recommendations about the adequacy or efficiency of current levels of spending.[[314]](#footnote-315) This was then identified as a priority project for the EPHC in 2006, with Heritage Victoria leading on data standards.

Proposals were developed for a comprehensive project that included not just data on the number, type and condition of heritage, but the economic, social and environmental impact of heritage programs including regular state of our heritage reporting, national baseline data, new frameworks for valuing heritage and addressing the role of heritage in climate change. It argued for better economic and social metrics for heritage, that would include and investment framework to help agencies prioritise resources, led by key academics in the field. The bid was not successful.

The need for such an observatory was raised previously in the work around the productivity commission and again in the Heritage Victoria 2014 Community Attitudes study.[[315]](#footnote-316)

The need for both systematic data collection, and regular research reviews on the social, economic and environmental impacts of cultural heritage investments from the relevant academic disciplines (e.g. environmental psychology, deliberative governance, education, research into the cultural determinants of health, and in particular the role of heritage in equity) remains as pressing as ever.

In England, similar concerns about the lack of data on heritage led to the establishment of Heritage Counts in 2002 – an annual program of both systematic data collection, and regular reviews of economic, social and environmental research that is of relevance to cultural heritage. Now led by the Heritage Forum, this initiative provides policy makers and practitioners with access to a wide range of reliable data, such as the recent comprehensive reviews of social, economic and carbon-related heritage research. The inclusion of heritage questions in regular social surveys that make it possible to track participation over time. However, issues remain in Scotland, Wales and Northern Ireland.[[316]](#footnote-317)

# Epilogue: four strategic heritage policy research challenges

***This chapter goes beyond individual research questions to identify four strategic research challenges for heritage policymakers in Australia that might benefit from working in partnership with universities and across government.***

As this report has shown, the potential economic, social and environmental benefits of heritage assets and activities is a huge field of research, extending across multiple research disciplines from economics and psychology to physics and health.

At the same time, the question of the impact of cultural heritage lies at the heart of wider public policy questions about the economy, sustainability, climate change and wellbeing. Without understanding these issues, it is difficult to give greater weight to cultural heritage in wider public policy.

It is beyond the capacity of public sector heritage agencies in Australia, with their increasingly constrained resources, to address these challenges. Instead, they require a collaborative approach, working in partnership with Indigenous leaders, universities, other government departments, the private sector and communities.

## Heritage and wellbeing

***Wellbeing is fast emerging as an important public policy driver that replaces economic models of ‘growth’ but the role of cultural heritage in wellbeing is not always clear.***

Questions about the social impact of heritage activities and assets rapidly merge into the bigger issue of the role of heritage in wellbeing.

Wellbeing is about the ability of present and future generations to live lives that they have reason to value, in balance with the natural environment. Wellbeing approaches tend to be holistic, to think long term and to focus on the future.[[317]](#footnote-318) There are similarities between wellbeing and sustainability in that sustainability focuses on the ability of future generations to meet their needs, and takes an integrated approach across social, economic, environmental and (sometimes) cultural issues. However, wellbeing builds on this to place more emphasis on social and often health outcomes.

In the future cultural heritage policy makers in Australia will need to show how cultural heritage can contribute to wider wellbeing goals. The Australian government has long argued that wellbeing should be the guiding purpose of government. This issue was on the ABS radar in 2001[[318]](#footnote-319) and the Australian Government published a framework in 2012.[[319]](#footnote-320)There was a consultation on measuring what matters in 2022[[320]](#footnote-321) and in 2023 Australia published its first wellbeing framework, ‘Measuring What Matters’.[[321]](#footnote-322)

The ACT Government already has a wellbeing framework in place whilst in Victoria, VicHealth has been leading on new thinking about the role of wellbeing in policy in Victoria.[[322]](#footnote-323)

This Australian thinking aligns with wider global initiatives around wellbeing. Countries are adopting new models of progress defined in terms of greater equality, sustainable societies, and environments and, improved quality of life.

The Wellbeing Economy Governments Partnership, brings together countries such as Scotland, New Zealand, Iceland, Finland, Canada and Wales. For example, Scotland has appointed a cabinet minister with responsibility for wellbeing and developed a wellbeing economy approach and toolkit that supports place-based economic development.[[323]](#footnote-324)

One of the biggest challenges for cultural heritage is the role of heritage in wellbeing goals. The new Australian framework mentions diversity, culture and belonging but is not explicit about cultural heritage. There can be a lack of clarity around the role that culture – and cultural heritage – can play in addressing wellbeing.

Aboriginal leaders in Victoria have taken the lead in addressing this. Culture is at the centre of the Balit Murrip: Aboriginal Social and Emotional Wellbeing Framework - part of the Victorian Government’s commitment to providing a long-term vision to improve the social and emotional wellbeing and mental health outcomes for Aboriginal communities. The framework has been developed with the shared knowledge and wisdom of leaders and experts in Aboriginal social and emotional wellbeing and Aboriginal community-controlled organisations.[[324]](#footnote-325)

New Zealand has also been developing wellbeing approaches that incorporate culture into wellbeing. This quadruple bottom line of cultural, economic, social and environmental wellbeing is one of two core responsibilities for local government. Cultural wellbeing encompasses,’ values, shared beliefs, customs, behaviours and identity’ and includes:

arts creative and cultural activities, language film and broadcasting, history and heritage, sport and recreation, sense of place, and balancing integrating and innovating.[[325]](#footnote-326)

Culture is also central to wellbeing in Wales. The 2015 Wellbeing of Future Generations Act (Wales) identifies well-being as a purpose for public bodies. The Welsh approach includes seven well-being goals one of which – ‘A vibrant Welsh culture and a thriving Welsh language’ focuses on culture.[[326]](#footnote-327)

As well as setting wellbeing goals, there is one other very important aspect of the Welsh approach to wellbeing that has relevance to cultural heritage practice. This is the ‘five ways of working’. These are:

* thinking for the long-term – considering how decisions impact on the future,
* prevention – avoiding detrimental long term effects,
* integration – ensuring actions in one area complement rather than undermine others,
* collaboration – working with others inside and outside the organisation, and
* involvement – involving as wide a range of people in shaping decisions that affect their lives.[[327]](#footnote-328)

‘Integration’ for example should ensure that goals in one area (such as economic goals) do not undermine goals in other areas (e.g. culture and heritage). As an example of this integrated approach, the recent Welsh transport strategy includes cultural heritage goals. [[328]](#footnote-329)

Further work on cultural heritage and wellbeing has been done by Historic England. Their

report on heritage and wellbeing sets out a framework that suggests that caring for cultural heritage can deliver wellbeing in several ways – as a process, as participation, as a mechanism that brings people together, as a source of healing, for its contribution to sense of place and as part of the natural environment.

In terms of empirical research for heritage and wellbeing, the DCMS CASE review of the social and economic impacts of culture and heritage assets on places used a definition of placemaking based on wellbeing outcomes. However, the main focus of the review was on the correlations between investing in cultural and heritage infrastructure and competitiveness. Later work by Fujiwara et al has used an economic wellbeing methodology that expresses the value of culture or heritage to people in terms of the additional income that it is worth.[[329]](#footnote-330)

Following their systematic review of the primary evidence on heritage and wellbeing, mainly from UK sources, the What Works scoping report made four recommendations for future research on heritage and wellbeing:

1. Develop an empirically based conceptual framework for understanding community wellbeing in the context of heritage and use this framework to underpin future research.
2. *Meaningfully* empower communities to help shape the nature of heritage policies and interventions.
3. View the impacts or heritage places and assets through an inequalities lens that focusses attention on positive and negative impacts and the distribution of impacts within and across population groups.
4. Develop a systematic and coordinated approach to raising the methodological quality of the evidence-base over time and involving all stakeholders.[[330]](#footnote-331)

It is suggested that Australia could adapt this approach to consider the role of cultural heritage in wellbeing in Australia, taking into account the importance of embedding Indigenous thinking and self-determination, drawing on some of the New Zealand experiences.

## Cultural heritage and climate change

***Addressing climate breakdown is fast becoming one of the biggest reasons to care for cultural heritage.***

Climate change is one of the most urgent policy drivers for our time. Despite evidence for the role of cultural heritage in decarbonisation, reducing waste and ecosystem resilience/ biodiversity, the role of cultural heritage is often overlooked in key policies which prevents the benefits of caring for cultural heritage from being realised. It also leads to a risk of ‘maladaptation’ as policies designed to deliver wider benefits fail to do so, because for example traditional knowledge has been lost or ignored.

This is a significant research topic that needs a collaborative approach to identify the work currently taking place across universities in the natural and built environment sectors, and to make the connection between that and cultural heritage initiatives.

It also involves moving the debate from a narrow focus on how to retrofit listed heritage items to the bigger question of how doing more to conserve, repair, mend and adapt what we have now (whether protected or not) can contribute to addressing climate breakdown.



Figure 27 Conserving what we have now can help address climate change.

## Culture and heritage capital

***This section explores the potential to use culture and heritage capital accounting models to give greater weight to cultural heritage in public policy decisions.***

Australia has been exploring econometric approaches to the valuation of natural heritage assets through what is known as Natural Capital Accounting. This uses an ecosystem services model that considers the benefits to people and society provided by the natural world, including habitats and species, and natural processes such as the atmosphere and the water cycle. The model involves two things – defining the ‘services’ provided by those resources, and then monetizing those resources. The aim is then to be able to use those dollar values in benefit-cost appraisals.

In their response to the Juukan Gorge inquiry, AIATSIS argued that the failure to understand the economic benefits of Aboriginal cultural heritage was one of the factors behind the lack of consideration.[[331]](#footnote-332) Terri Janke has also been exploring monetary values for Aboriginal cultural knowledge as a way of helping to ensure that it is appropriately recognised in economic thinking. The long history of research into the relationship between historic heritage and property prices suggests that this is an area of continuing concern.[[332]](#footnote-333)

This issue is not new. In 2008 the Office of Best Practice Regulation made the case for greater use of cost-benefit analysis to address the lack of data to inform the government case for regulation or investing in heritage put forward by the 2006 Australian Productivity Commission report.[[333]](#footnote-334) They argued that:

delivering net benefit to the community (taking into account economic, social and environmental impacts) should be one of the criteria for evaluating historic heritage conservation efforts. However, in practice there are significant challenges, mainly because there are inherent challenges in measuring benefits and costs in dollar terms.[[334]](#footnote-335)

To address similar challenges, the UK government has been exploring the application of Natural Capital models to valuing culture and heritage capital. [[335]](#footnote-336) The aim is to transform the approach to assessing value for money through robust appraisal and evaluation. DCMS is publishing research, data, guidance and tools to help organisations make a stronger case for investment in culture and heritage assets, consistent with the HM Treasury Greenbook principles on assessing value for money in public expenditure. The project has involved extensive literature reviews of valuation studies and will involve further work on understanding the wider services provided by cultural heritage assets. The leading Australian cultural economist Professor David Throsby has advised on the programme.[[336]](#footnote-337)

The Surveyengine study conducted as part of the SGS work for Victoria attached monetised values to individual types of heritage assets for Victoria in a methodology that factored in condition, distance, and other factors.[[337]](#footnote-338)

A more systematic approach to understanding monetary values for cultural heritage assets including intangible assets such as language and traditional knowledge will be vital to giving greater weight to cultural heritage in strategic decision making.

It is strongly suggested that the HCV works with other bodies either at a State or Australia wide level, to begin to explore the potential role of culture and heritage capital in wider economic modelling.

## Learning from Indigenous approaches

***Finally, this report ends where it perhaps should have started, with a call for a greater understanding of Indigenous knowledge and teachings around the role of cultural heritage in the world around us.***

As noted, Aboriginal policy makers in Victoria have been at the forefront of thinking about the link between cultural heritage and wellbeing in Australia. Indigenous thinkers in the cultural heritage space are also leading on more holistic approaches to cultural heritage and place that moves away from individual listings towards a recognition of the value of Country as a whole and the important role of people and communities in managing cultural heritage.[[338]](#footnote-339)

The primary focus in Australian cultural heritage policy is currently enabling a stronger voice and frameworks for self-determination for Aboriginal and Torres Strait Islander people in heritage through frameworks such as Dharuwa Ngilan, and reforming legislative structures and decision making and reporting on Aboriginal Cultural Heritage. This is essential to address underrepresentation and inequality in the heritage space.[[339]](#footnote-340)

Although Australia currently operates a (largely) twin-track approach to Indigenous and non-Indigenous cultural heritage, there is clearly potential to learn from Indigenous thinking and apply those lessons to wider cultural heritage in Australia. Key concepts such as deep listening, yarning, respect, self-determination and holistic approaches to the value of place that are of potential relevance to all heritage.[[340]](#footnote-341) New Zealand has already taken this approach, embedding Maori approaches to cultural heritage across heritage policy in general.[[341]](#footnote-342)

Some of the most innovative thinking in relation to the wider economic, social and environmental benefits of cultural heritage is also coming from Indigenous leaders, academics and policy makers. This includes work on cultural heritage and health noted in Chapter 3, on wellbeing (see above), in land management (we have not been able to include the environmental benefits of Aboriginal cultural heritage and knowledge in this report) and the economy (such as Professor Terri Janke’s work on the economic value of Indigenous knowledge).[[342]](#footnote-343)

Again, New Zealand demonstrates the potential to embed cultural knowledge and approaches into wider public policy. As noted, Manatu Taonga, the Ministry for Culture & Heritage brings together Tiaki Taonga – the care, preservation and protection of iwi taonga and heritage into one place.[[343]](#footnote-344)

An Indigenous lens will be vital to taking a uniquely Australian perspective on any of the three big questions raised above – the role of cultural heritage and climate change, the role or heritage in the economy and the role of cultural heritage in wellbeing.

A project that explores the relationship between cultural heritage and wider outcomes for society from an Indigenous perspective, drawing on published research, policy making and Indigenous lore and knowledge, could be a starting point for helping to address the bigger question of why cultural heritage matters.

# **ANNEXES**

# Annex 1: Cultural heritage activities in Victoria

***This annex is the first part of the heritage stocktake for Victoria. It summarises data on cultural heritage activities.***

One of the requirements for this project was a heritage stocktake for Victoria, taking a broad view of heritage. The focus is largely on non-Indigenous cultural heritage, complementing the recent State of Victoria’s Aboriginal Cultural Heritage Report 2016-21 (see below).[[344]](#footnote-345)

We have compiled the heritage stocktake in two parts – the first covers data on heritage activities and the second (Annex 2) covers data on heritage assets and their condition The model of heritage assets and activities notes that heritage is not just about places, objects and collections, but also about how people engage with it (see Figure 1 in the executive summary).[[345]](#footnote-346)

Whilst the 2021 quinquennial State of the Environment Report for Australia includes data on Indigenous and historic cultural heritage, that data covers the condition and management of protected heritage assets. It does not include information on heritage activities and the funding data does not include other sources of funding. [[346]](#footnote-347)

The important State of Victoria’s Aboriginal Cultural Heritage Report 2016-21 is based on extensive consultation with Aboriginal peoples living in Victoria, businesses and organisations, Traditional Owners Groups and Registered Aboriginal Parties (RAPs). As well as addressing priorities it includes information on Aboriginal cultural heritage assets and activities, including caring for Country.[[347]](#footnote-348) However there is no equivalent report for non-Aboriginal cultural heritage in Victoria, so this stock take goes some way towards starting to fill that gap.

The stocktake begins with cultural heritage activities. This is because the focus of the report has been on the social, environmental and economic impacts of cultural heritage, many of which arise not from the assets themselves but from the way people engage with them. The Heritage Council of Victoria plays a key role in supporting and enabling cultural heritage **activities** through its functions in relation to conserving the State’s cultural heritage, promoting public understanding, and managing the heritage fund which supports cultural heritage activities.[[348]](#footnote-349)

We have grouped the ways in which people engage with heritage into two broad categories:

* **active involvement** doing something to care for one’s own cultural heritage or that of others. It can range from keeping a building in use by living in it or using it to keeping alive craft traditions or knowledge through doing, through archiving knowledge or through teaching others, and
* **engagement –** the different ways people consume cultural heritagecultural heritage such as participating in traditions or rituals, visiting sites, enjoying exhibitions, films or stories, and learning about one’s own cultural heritage and that of others.

The distinction is not hard and fast, and the two categories overlap.

Note that this stocktake does not claim to be a comprehensive or authoritative snapshot of data on participation in cultural heritage. It simply highlights some data from various sources, including the Australian Bureau of Statistics (ABS). A statistically robust picture of the sector would require a more in-depth analysis of ABS data, across arts and culture, tourism, the social survey, construction and possibly other areas.

## Active involvement

***This section summarises the different ways in which people are actively involved in caring for their own heritage or that of others.***

### Custodians, owners and occupiers

***This section identifies different groups who occupy, own or use heritage assets including Traditional Custodians, individuals and government agencies.***

The most important people in the cultural heritage field are the custodians, owners and occupiers who care for heritage every day. These are the people and organisations that live on, care for, manage or use important sites, places and objects, or by keeping alive intangible cultural heritage such as language.

As noted in the State of Victoria’s Aboriginal Cultural Heritage Report 2016-21, Victorian Aboriginal people hold a deep connection to their Country through living on it, visiting it and passing on ancestral knowledge. Aboriginal people are the primary custodians of Aboriginal cultural heritage.[[349]](#footnote-350) The Victorian Aboriginal Heritage Council ensures that Traditional Owners or Registered Aboriginal Parties are responsible for key statutory functions relating to the preservation and protection of Victoria’s rich Aboriginal Cultural heritage. Within Victoria there are 32 recognised Traditional Custodian groups, 38 Aboriginal language groups and around 48,000 Aboriginal residents mainly living in major cities (although this may be an underestimate given that identification of Aboriginality was associated with colonial policies). There are also 11 Registered Aboriginal Parties (RAPs) in Victoria, covering approximately 75% of the state.[[350]](#footnote-351)

Others participate in cultural heritage by owning, using, or living in a historic building site, or caring for an important object or collection.[[351]](#footnote-352) These are not monuments, but people’s places of work or homes. Overall, 91% of State-registered heritage places in Victoria (see below) are occupied or in use. On this basis it is likely that the majority of the over 186000 sites and objects protected through Heritage Overlays are occupied or in use. The feasibility study for a Victorian Heritage strategy noted that most of Victoria’s heritage places are owned and used at a local level.[[352]](#footnote-353)

An important but often overlooked area of heritage practice is the Australian technology heritage sector. The sector estimates that around 400,000 individuals are **actively** involved in caring for technological heritage in that they own, or belong to organisations which own, machines, and spend time and money on those machines.[[353]](#footnote-354)

Apart from the data on registered heritage assets above, we know relatively little about these people or organisations. Often in the private sector or voluntary sectors, they play a care for cultural heritage, often with little or no public subsidy. For example, the Australian technology heritage sector estimates that around 400,000 individuals are involved in caring for technological heritage. We have identified the need to map the cultural heritage ecosystem, and better understand the role of both commercial organisations and voluntary sector organisations as a significant gap in our knowledge.

Federal, State and local governments are significant holders of heritage assets in Australia.

Of the 1995 places on the Victorian Heritage Register in 2010, 621 were identified as being in public ownership with the remaining 1364 places listed as being in private ownership.[[354]](#footnote-355)

A previous evaluation of the Victorian grants program noted that grants were given to buildings owned by 30 different departments and agencies. A recent review of state heritage assets in NSW identified that around 50% of assets on the SHR are publicly owned.[[355]](#footnote-356) An earlier unpublished review for NSW specifically looked at heritage assets in State government ownership, and noted the multiple ways in which government agencies may have responsibility for heritage assets, even though it is not their primary role (see below).[[356]](#footnote-357)

### Cultural heritage workforce

***This section explores data on the workforce that provides cultural heritage services in Victoria.***

The cultural heritage workforce can be defined as people whose work (paid or unpaid) involves caring for the cultural heritage of others (many more people care for their own cultural heritage). The cultural heritage workforce delivers cultural heritage services. Cultural heritage services are the services that enable others to enjoy and participate in cultural heritage. Those services may be provided through individuals or through private, public or community organisations (see below for service providers).

In 2011 3.1% of the population (310,725 persons) worked in a cultural occupation in Australia. This included people in a cultural occupation in a cultural industry and those who worked in a cultural occupation in a non-cultural industry. The largest groups were graphic designers, ministers of religion and architects.[[357]](#footnote-358)

According to census data in 2006 there were around 6,412 people working in museum operations, including museums and art museums in Victoria.[[358]](#footnote-359) Of those around 2922 people worked in libraries and archives, museums, zoos and botanical gardens, nature reserves and parks.[[359]](#footnote-360) Museums Victoria employed 514 FTE people in 2021-2.[[360]](#footnote-361)

At the end of June 2008 around 7856 people were employed in 1184 museum/gallery organisations operating from 1456 locations across Australia, employing around 7856 people. There are around 548 public libraries.

Victoria estimates that in 2019-20 around 292,000 people work in the creative industries – 8.6% of the total workforce. Around 3,000 people work in Victoria’s cultural institutions.[[361]](#footnote-362)

The Australian National Trusts employ about 350 people.[[362]](#footnote-363)

The Traditional Owners, RAPS and Aboriginal people note above also play a critical role in caring for cultural heritage in Victoria and so can be seen as part of the cultural heritage ‘workforce’ and should also be included in more comprehensive reporting.

This data also excludes employment in other statistical domains that are relevant to heritage, including tourism and construction. It is not clear whether the ABS heritage data also includes people with a heritage role in other areas of the public sector, or people in non-heritage occupations (e.g. finance) who work in the heritage sector (a similar issue arises for arts employment

### Volunteers

***This section notes data on cultural heritage volunteering.***

The cultural heritage workforce also includes volunteers. Whilst there is no specific data on cultural heritage volunteering in Victoria or Australia as a whole, the extent of volunteering for cultural heritage can be estimated using general volunteering data for Australia. This suggests that around 5.6% of the population volunteer in the arts, culture and heritage space. Many Aboriginal people also play a key role in heritage protection but are not compensated.[[363]](#footnote-364)

The Australian General Social survey provides data on the social characteristics, wellbeing and social experiences of people in Australia, including involvement in social, community, civic and political groups. Around a quarter of Australian aged 15 years or over participate in unpaid voluntary work through an organisation (lower than the 30% in 2019). Overall, unpaid voluntary work through an organisation contributed 489.5 million hours to the community in the 12 months prior to the 2019 General Social Survey.[[364]](#footnote-365) The 2021 release focusses on the period during the pandemic. In 2020 over 46% of Australian were involved in social groups and 21% in community support groups, but this has declined during the pandemic.

Data on volunteering can also be collated from individual annual reports and grant evaluations. For example, an evaluation of the Heritage Victoria ‘Hands-on Heritage’ program, launched in 2000 enabled volunteers to work on heritage places as a way of broadening community networks through heritage. The program successful increased the overall volunteer hours each year from one site with 14 days of volunteering in 2,000 to 30 sites with 1,100 days of volunteering.[[365]](#footnote-366)

The Museums Victoria recorded around 10,331 volunteer hours for 2021-2.[[366]](#footnote-367) The National Trust of Victoria has around 2,000 volunteers who (pre Covid-19) provided around 104,800 hours of service to their properties.[[367]](#footnote-368) The National Trust of Australia has a volunteer workforce of around 7,000.[[368]](#footnote-369)

There are also around 400,000 volunteers in the Australian technical heritage field (see above) and data on volunteering can be found on individual heritage websites and annual reports (such as the Puffing Billy Annual report).[[369]](#footnote-370)

### Membership of heritage organisations

***Another measure of active involvement in heritage comes from membership data for the many professional bodies, historical societies, voluntary sector organisations and special interest groups who deal with different aspects of cultural heritage.***

The rise in online resources has led to an explosion of interest in family history and genealogy. The Genealogical Society of Victoria is a not-for-profit group founded in 1941 to assist people with their family histories. It brings together around 51 member societies from all over Victoria including geographical groups, groups descended from convicts and Aboriginal groups.[[370]](#footnote-371) The group provides talks, workshops and activities, and links to people around the world. The group’s collection includes over 30,000 titles including passenger lists, local histories and directories.

For Australia as a whole:

* there are about 1,000 historical societies with around 100,000 members throughout Australia,[[371]](#footnote-372)
* there are around 4,500 organisations in the technological heritage space, and around 400,000 volunteers are **actively** involved in heritage machines,[[372]](#footnote-373)
* AICOMOS, the peak body for cultural heritage practitioners in Australia has around 800 members,[[373]](#footnote-374)
* in 2005, around 72,200 people belonged to the Australian National Trusts.

The technological heritage sector deal with portable heritage and the intangible heritage associated with them. Technological heritage includes rail, maritime/riverine, aviation, motor vehicles, horse-drawn vehicles and portable and stationary machinery from steam and combustion engines to household appliances. The largest sector is motor vehicle sector (cars, trucks, motorcycles, tractors and military vehicles).

Other groups include the Association for Australian Archaeology (AAA), the Australian Society for Historical Archaeology (ASHA). Most individual museums and cultural institutions also have members organisations.

For Victoria, the National Trust of Australia (Victoria) has around 15,000 members.[[374]](#footnote-375) The Royal Historical Society of Victoria is the peak body for historical societies in Victoria with a mission to ‘Promote the Victorian experience of Australian history’. There are around 350 local heritage groups that belong to the society, and nearly 1,000 individual members.[[375]](#footnote-376)

It is difficult to collate overall data for membership of cultural heritage organisations in Australia as there is no umbrella body for heritage. The UK-wide Heritage Alliance is an example of an umbrella body for heritage that brings together over 190 heritage organisations with a combined membership of around 7 million volunteers, trustees, members and staff from large bodies such as the National Trust to specialist charities and community organisations across the breadth of the sector from museums to science and construction.[[376]](#footnote-377)

In conclusion, the membership of heritage organisations in Victoria suggest that the voluntary and paid heritage sectors are potentially extensive. One of the research gaps we have identified is a more comprehensive exercise to map these organisations.

### Heritage activism

***Heritage activism is often caricatured as ‘NIMBYism’[[377]](#footnote-378) but plays an important role in caring for cultural heritage.***

People also get involved in cultural heritage through heritage activism – taking action to protect a local (or any other) cultural heritage place or item from damaging change or becoming derelict or disused. Activism includes signing a petition, donating money or expressing concern.

Australia has a long tradition of heritage activism, not least the, in NSW, campaigns to save the Rocks in Sydney or the recent campaign ‘Don’t Block the Rocks’.[[378]](#footnote-379) Comparable campaigns in Victoria were developed to save individual buildings – for example the Castlemaine Market Building in the 1950s, the Regent Theatre in the 1960s and the Rialto precinct in the 1970s. Today. organisations such as the National Trust, Melbourne Heritage Action and the Australian Heritage Advocacy Alliance (AHAA), continue to campaign to protect heritage buildings throughout Victoria.

An ABS attitudinal survey from 2010 estimated that around 34% Australians had been involved in some form of environmental action in the previous 12 months - some of which will include heritage activism. with the most common action being signing a petition relating to environmental issues (17%), donating money to protect the environment (14%), and expressing concern through a letter, email or talking to responsible authorities (10%). The least common environmental activity undertaken was participating in a demonstration or rally on environmental issues (2%). Volunteering rated around 10%, which is around 540,000 adult Australians.[[379]](#footnote-380)

The National Trust Victoria provides advocacy guides including information on nominating places or objects for inclusion in the register and responding to planning permits and other decisions.[[380]](#footnote-381)

The VAHC report on Aboriginal cultural heritage in Victoria gives considerable weight to the role of Aboriginal people as advocates for cultural heritage, and to the importance of advocacy in general.

## Engagement

***People also engage with their cultural heritage and that of others as visitors, consumers and participants.***

Cultural heritage visitors include people who visit cultural institutions such as museums, libraries, galleries and archives, as well as people who visit and enjoy historic areas, landscapes, heritage attractions and places of cultural significance as tourists. People also enjoy public programmes and events inspired by culture and heritage or held in significant places or participate in traditions or rituals. Learning a language or finding out more about one’s heritage are also forms of engagement.

### Participation in arts and culture

The ABS collates data on participation in cultural and arts for Australia and for individual states. However, the most recent snapshot of ‘Participation in selected cultural activities’ does not include museums, cultural heritage or technical heritage. The Australian General Social Survey does not include questions about attending culture and heritage (although it does have questions about involvement in civic groups and cultural tolerance) whereas the England-wide Taking Part Survey has included questions heritage including visiting heritage sites, digital participation and volunteering. There are also profiles of who visits sites.[[381]](#footnote-382)

The Australian Audience Outlook monitor has tracked engagement in arts, culture and creativity during the pandemic and continues to bring updated data, with support from state and federal governments. The Victorian snapshot for November 2022 surveyed 1587 people in Victoria. They found that people were positive about attending but audience levels were yet to return to pre-pandemic levels. Audience levels were stable with 7 in 10 people attending cultural events in the past fortnight. Financial reasons were the main barrier to attendance, overtaking the risk of the virus. They also found that Victorian audiences were more likely to be attending local events than not – one quarter recently attended events outside their region or state. As 4 in10 people participate in the arts online this is an important growing area.[[382]](#footnote-383)

For example, the Museums Victoria reports 1.2m ticketed visitors and a total of 9m visitors including the Royal Exhibition building, and online attendance.[[383]](#footnote-384)

Prior to Covid-19, around 130.8 million people visited parks and piers in Victoria in 2018-19. 75% of people in Victoria had visited a park, a figure that had remained stable since around 2002.[[384]](#footnote-385)

As noted above, one of the most popular heritage sectors in terms of visitor numbers, is technological heritage. There are over 3.5 million paid visitors to technological heritage sites and attractions in Australia each year. This is a considerable underestimate because only those charging admission are measured (e.g., Puffing Billy with over 500,000 visitors each year or the Maitland Steam fest with over 60,000 visitors), but many other events (of which there are hundreds each week) are not measured, as they are free or rely on a gold coin donation for charity or are held in a public place with free access.[[385]](#footnote-386)

People also participate in heritage through festivals, open days and other activities. The annual Australian heritage festival is a countrywide festival that includes events in Victoria. For example, the 2022 event took place in a reduced format, involving Traditional owner groups, historical societies, community museums, local councils and heritage enthusiasts as well as NTV branches and properties. There were 107 events with 69 organisers.[[386]](#footnote-387)

At the 2011 Melbourne Open festival over 100,000 people visited 75 open properties across the city and 9 out of 10 of the most visited places were on the State Heritage Register. In 2021, the online event attracted over 250,000 online visits, effectively doubling the 2019 attendance numbers.[[387]](#footnote-388)

### Culture and heritage visitors

***Culture and heritage can be an important driver for domestic and international visitors.***

The ABS also collates data on tourism and the visitor economy as part of the system of national satellite accounts which focuses on the economic activities of visitors to Australia, including international and domestic visitors.[[388]](#footnote-389) Tourism Research Australia (TRA) also provides snapshots for the tourism market.

In 2008, the CRC on Culture and Heritage Tourism also provided a contemporary overview of data on culture and heritage tourism in Australia, including tables setting out visitor numbers, nights and trip expenditure for culture and heritage visitors in 2007.[[389]](#footnote-390)

The last snapshot of cultural and heritage visitors was provided by the ABS in 2009.[[390]](#footnote-391) It defined cultural and heritage visitors as those who participated in at least one of the key activities including attending theatre, concerts, museums, art galleries, festivals, cultural events. The data includes visiting Aboriginal sites or communities, and historical/heritage buildings and monuments. At the time, international cultural and heritage visitors comprised half (51%) of all international visitors to Australia. In 2009 Australia’s cultural and heritage tourism market was predominantly domestic visitors – there were 9.3 million overnight visitors and 9.5 million domestic day visitors.

Since then, Covid-19 has impacted on cultural and heritage visitors. The 2020 snapshot of travel by Australians showed that domestic overnight trips had fallen by 31% with a decline in spend of 34%. In terms of overnight trip activities, visits to museums and galleries had fallen by 61% and visits to heritage sites by 53%. The 2021 State of the Industry report note that international tourism was still down by 95% compared with more normal years and the economic impact was down by 50%.[[391]](#footnote-392)

The snapshot does not specifically breakdown cultural and heritage visitors, since Covid-19 attending festival fairs and cultural experiences was down 65% on 2019, but activities such as bushwalking and snorkelling were above 2019 levels.

The 2023 National Visitor Survey showed that domestic tourism spends had increased beyond pre pandemic levels. However, the trip purposes are only broken down into holiday, visiting friends and relatives, business and other so it is not possible to see trends in culture and heritage visitation.[[392]](#footnote-393)

### Digital engagement

***This section identifies some information on how Victorians engage with digital heritage content.***

As noted, above, around 4 in 10 people engage with arts online but it is more difficult to gauge the extent to which Victorians engage with heritage online or through watching programmes about culture and heritage.

There is a large amount of broadcast media content relating to cultural heritage. As well as programs such as Restoration Australia, the ABC iView History A-Z [[393]](#footnote-394) highlights the variety of programs about history and heritage from Radio Redfern and 9/11 stories through to programmes about war, Chinese heritage, walking landscapes, museums and much more whilst the SBS OnDemand page also highlights a range of history programs.[[394]](#footnote-395)

There is also a thriving virtual reality and video games sector. For example, Virtual Songlines is a collection of first nations and non-indigenous game developers specialising in the recreation of precolonial Australia.[[395]](#footnote-396)

This is an important area that would benefit from a more comprehensive investigation. As noted, the DCMS participation survey tracks digital participation in heritage in England. It notes that in 2019/20 30% of respondents had visited or used a heritage website or app in the past 12 months.[[396]](#footnote-397)

## Cultural heritage service providers

***This section map some of the organisations in the public, voluntary and private sector who provide cultural heritage services and employ or support the cultural heritage workforce.***

As noted above cultural heritage services can be defined as services that enable other people to care for cultural heritage (as opposed to caring for your own heritage).

This might include:

* Aboriginal cultural heritage services including expertise in language, cultlure, archaeology, language, land management, caring for culture and designing for country,
* services relating to the design, conservation, repair and adaptation of buildings and sites or land management,
* the day-to-day conservation, management and care of publicly owned heritage assets including collections, objects, sites, parks and reserves,
* providing access to heritage including heritage interpretation, programs or festivals for the public including place activation,
* opening heritage sites or places to the public (whether privately or publicly owned),
* research and investigation services including archaeology, heritage management, historical research, scientific investigation and other research services,
* advice on the formal protection and care of cultural heritage including accreditation and quality control, and
* funding or other support for cultural heritage assets and activities.

### State and local government

***This section explores government responsibilities for cultural heritage services in Victoria.***

The primary departments that support heritage in Victoria are the Department of Premier and Cabinet (DPC) which includes First People-State Relations, the Victorian Aboriginal Heritage Council, the Department of Transport and Planning (DTP) which includes the Heritage Council of Victoria, Heritage Victoria, Parks Victoria and Development Victoria, and the Department of Jobs, Skills, Industry and Regions which includes Aboriginal economic development, the cultural and creative economy (including Creative Victoria), tourism and events (including Visit Victoria) and Regional Arts Victoria. The Victorian Government also has a strategy for war heritage and history, with support for historic heritage and practices and traditions.

As noted above, many other government agencies hold or care for heritage assets within their wider asset portfolio, even if it is not their core purpose, such as Education and Transport. This table provides some examples of how that can happen:

|  |  |  |
| --- | --- | --- |
| **Service provided by the heritage asset** | **Examples** | **How the asset was acquired** |
| **The heritage asset delivers the agency service** | Railway stations such as Flinders St Station school buildings, court houses, bridges, public buildings, bridges, roads | Often these were built or created by the agency but may now be more than 50 years old. |
| **Public access to heritage asset is part of the agency service** | Heritage assets that are open to or enjoyed by the public e.g. historic locomotives, museum buildings and collections, archives and State Library | Acquired in fulfillment of legislation, or as part of the creation of a State Collection |
| **Conservation of heritage is the mandated agency service** | Sites monuments, buildings and collections that are part of the Parks estate or held in museums or archives | Acquired in fulfillment of legislation as part of the creation of a State Collection |
| **State government has acted as the custodian of last resort** | Former government properties now managed by Working Heritage, reserve system acquisition, collections donated through philanthropy or taken on as a result of management issues. | Properties, collections or items gifted to the State government to secure their long-term future or acquired as a legacy of land subdivision or development |
| **Cultural assets that record the history, identity & traditions of the service** | Police, collections, fire service collections, historic items such as Parliamentary regalia and collections, portraits, transport history | The historic activities and traditions of the agency |
| **Assets incidentally acquired during strategic resource acquisition** | Possible examples might include heritage assets in parks | Heritage buildings acquired for community or green space acquisition; cultural heritage assets acquired during road corridor acquisition or the acquisition of land for natural values |

Figure 28 examples of how state government agencies are responsible for cultural heritage, even if it is not their primary role

Local councils in Victoria are key providers of heritage services including advice and funding under the *Planning and Environment Act 1987*. There are 79 municipalities across the state of Victoria.[[397]](#footnote-398) The recent HCV study of local heritage in Victoria provides a comprehensive overview of the sector and provision. In Victoria 73% of councils have a heritage advisor and 47% offer heritage events. 53% of councils have a current heritage strategy.

The HCV study of current arrangements for local heritage in Victoria was also designed to act as a baseline for the future.[[398]](#footnote-399) A similar project has been underway in England since the mid 2000s, where the Institute for Historic Buildings Conservation (and before that English Heritage) finding that over the past decade, local conservation services have declined by 50%.[[399]](#footnote-400)



Figure 29 The Heritage Council of Victoria review of Local Heritage, 2020

### Museums, archives and libraries

***Many other institutions provide cultural heritage services in Victoria, including museums, archives and libraries.***

Museums, archives and libraries are important custodians of cultural heritage, caring for sites and collections and providing many of the other cultural heritage services listed above, including expertise, conservation, research, access, interpretation and support. Many museums, archives and libraries are located in or on important cultural heritage sites and buildings, and indeed historic buildings (such as the Royal Exhibition Building) are often museums’ largest collection items.

Major Victorian cultural heritage institutions include Museums Victoria (incorporating Melbourne Museum, Scienceworks and the Migration Museum) the State Library and Public Record Office Victoria (PROV). There are many other local museums, archives and libraries across Victoria.

The core purpose of the State Library includes culture and history. The Victorian Archives Centre is operated jointly by the National Archives and PROV and provides access to both Commonwealth and state records.[[400]](#footnote-401) PROV is the archive of State and Local government in Victoria.[[401]](#footnote-402)

There are more than 100 accredited museums in Victoria including many smaller local collections and sites. This includes a wide range of voluntary or independent museums or heritage organisations such as the Buda Historic Home and Garden in Castlemaine, to railway museums such as the Daylesford Spa Country Railway or multicultural museums such as the Golden Dragon Museum in Bendigo. Major open-air museums include Sovereign Hill Museum and Swan Hill Museum.

The Victorian archives centres is operated jointly by the National Archives Public Records Office Victoria.[[402]](#footnote-403)

Museum accreditation is another cultural heritage service designed to help museums develop policies and procedures to meet recognised collections standards. These include house museums, volunteer managed community groups, historical societies, and state institutions. The work is supported by Creative Victoria and the ReRoss Trust.[[403]](#footnote-404)

### Visitor attractions, public entitles and other not-for-profit heritage organisations

***A range of other entities hold or care for heritage assets and open them to the public.***

Working Heritage Victoria (formerly The Mint Inc) is a public entity that conserves and managed heritage properties on public land for the State of Victoria. It manages 16 places on Crown Lands in Victoria, including the former Royal mint and court houses in rural towns. The Committee of Management is appointed by the Minister for Energy, Environment and Climate Change under the Crown Land (Reserves) Act 1978.[[404]](#footnote-405) The organisation takes on former government assets, most recently the Kyneton Primary school. Most of the properties are self-supporting and ideally contribute to income. There are 25 tenancies in 38 buildings across four sectors - community, commercial, arts and hospitality.

The National Trust of Victoria is an independent, not-for profit charity and the leading operator of house museums and heritage properties. It manages 17 historic properties and landscapes across urban and rural Victoria. As well as NTV owned assets, the organisation is responsible for the administration and conservation of Como House and the Committee of Management has arrangements with ten state government owned properties.[[405]](#footnote-406)

There are also many other organisations who open heritage assets to the public.

The Visit Victoria website highlights some of the many heritage visitor attractions in the state. For example, Puffing Billy is a preserved railway that provides heritage experiences, as well as holding a museum collection. Sovereign Hill is a not-for profit community based cultural tourism organisations that provides visitor experiences at a recreated heritage site. It holds the Australian Centre for Gold Rush collections. As well as interpreting heritage and hosting exhibitions, the organisation has an interest in and maintains heritage craft skills. The website includes other attractions such as cemeteries, former Prisoner of War Camps, historical parks, mills, galleries, light houses, former prisons and more.[[406]](#footnote-407)

### Heritage membership organisations

***A wide range of membership organisations in Victoria provide support for people interested in caring for or learning about their heritage.***

Many museums, archives and heritage visitor attractions have their own membership organisations that provide support for the organisation. The National Trust of Australia (Victoria) is for example a membership organisation and also cares for properties.

However, there are a wide range of other heritage membership organisations, including

genealogy and family history groups, historical societies, technological heritage societies, and groups representing particular communities. They also include groups responsible for Aboriginal cultural heritage including Aboriginal Corporations and Land Councils

Whilst not their core purpose, there are other community organisations which do play a role in heritage. For example, CO.AS.IT is the Italian Assistance Association is a charity committed to the general wellbeing and enhancement of the quality of life of the Italian-Australian community. The Italian History Society is involved in collecting, preserving and sharing Italian immigration experiences in Australia through exhibitions, events family history and other activities.[[407]](#footnote-408) Many other community organisations represent groups including social and sport clubs such as the Australian Turkish Association or Abruzzo Club, as well as organisations that support migrants and asylum centres. Whilst heritage is not part of their primary purpose, understanding people’s intangible cultural heritage including language, is often a part of their mission.

Perhaps the largest sector is the technology heritage sector. There are around 4500 organisations across all States, some with fixed sites, and some with a common interest and distributed collections. Many are in rural areas. Some of those organisations are large – for example the Historic Aircraft Restoration Society has over 1,000 active members, and some are much smaller.

There are some peak bodies, such as the Genealogical Society of Victoria which represents around 50 local societies or the Royal Historical Society which represents many local groups.

### Private sector heritage service providers

***There are a wide range of private heritage service providers in areas such as Aboriginal Cultural Heritage, tourism, planning, design, construction and events management.***

Some understanding of the range of specialists in the heritage field comes from the Victorian Heritage Services directory, launched by the National Trust of Victoria in 2020 to provide a comprehensive online directory of heritage services in Victoria. The directory includes access consultants; gardeners, arborists and horticulturalists; maritime, industrial and historic archaeologists; photographers; bricklayers, stonemasons, tilers, joiners and builders; collections managers and curators; conservators for buildings and objects; architects and design specialists; glass specialists heritage consultants, planners and interpretation specialists; paint and interior specialists; pest control; planning and law specialists; roofing specialists including plumbers and slaters; building surveyors, structural engineers, valuers and estate agents.[[408]](#footnote-409)

There are also providers of other heritage services in the private sector. For example, in Victoria 496 licensed tour operators generated over 472,000 visits to parks in Victoria in 2018-19.[[409]](#footnote-410)

## Funding for cultural heritage

***This section reviews some of the different sources of funding for cultural heritage in Victoria including funding from the public sector, incentives and private sector funding.***

The amount spent on cultural heritage in Australia includes spending by individuals, the private sector, voluntary organisations and the public sector on cultural heritage services and activities.

The Federal Office for the Arts publishes data on government cultural funding and participation for Australia which includes data on museums and ‘other cultural heritage’.[[410]](#footnote-411)

However, it can be difficult to identify funding for cultural heritage – for example the most recent post-Covid reporting of payments to arts and cultural sectors excludes cultural heritage from the definition of culture. As part of that series, it publishes State level data.[[411]](#footnote-412) Victoria had the highest percentage increase in funding for culture (40%) in 2021.However, funding for total heritage activities decreased with expenditure on ‘other museums and cultural heritage’ down $102.2 million offset by an increase in art museums.[[412]](#footnote-413)

Spending on ‘heritage’ includes spending on art museums, archives, libraries and ‘other museums and cultural heritage’. In 2020-21 Victoria spent $262.8 million on heritage, of which $60m was spent on ‘other museums and cultural heritage’.[[413]](#footnote-414) Revenue for Museums Victoria accounted for $54,853,000 of this.[[414]](#footnote-415)

The recent HCV report on local heritage attempted to track expenditure on local heritage by councils, including spending on studies, advisers, internal staff, supporting measures and heritage promotion. The data was not consistent, but the most significant heritage related expense was heritage studies. The median annual expenditure for Metro Inner councils was $200,000 per annum but other council spending ranged from $1,000 per annum to over $1 million.[[415]](#footnote-416)

### Aboriginal cultural heritage

Aboriginal cultural heritage is funded through both general heritage funding such as heritage grants and funding for cultural heritage institutions, and through dedicated Aboriginal cultural heritage funding streams, as well as through other public and private sector streams including fees for cultural heritage management plans.

In the 2022-3 State budget the Victorian government announced $13.5 million to ensure places of cultural significance are managed by First Nations people, as part of a total investment of $35.7 million for Aboriginal cultural heritage celebration, promotion and protection. That scheme includes an additional $3.3 million for assessment and mapping of Aboriginal cultural heritage sites on their Country, $1.4 million to deliver Aboriginal cultural events and awards celebrating and remembering Victoria’s Aboriginal culture and history and $2.6m to strengthen the Budj Bim Cultural Landscape World Heritage Rangers programs.[[416]](#footnote-417)

### Other heritage grants

The 2022 State of the Environment report notes that Australian public sector spends $16.6 million on grants for cultural heritage. This figure is an underestimate as it only reflects grants from the State and Federal heritage bodies and excludes other sources of public sector grants.

Since 2016 the Victorian Government has awarded over $55 million to over 165 heritage projects through heritage grants. The Living Heritage supports the repair and conservation of at-risk heritage places and objects included in the VHR. In 2020-1 Round 6 of the Community Heritage Grants stream supported 19 new conservation projects to publicly accessible heritage places, with a total value of $2.36 million. In 2022-3 the scheme will offer $2.212 million for urgent conservation works or studies to eighteen significant heritage places and objects across Victoria.[[417]](#footnote-418)

Only 35% of councils in Victoria offer some sort of financial incentive to support local heritage, and that is unevenly distributed 56% of all Metro Outer councils have at least one incentive whilst just 19% of all Rural Small councils have one. Grants are the most common incentives (18), followed by loans (7) and rate reductions. Two councils waived fees for planning permits.[[418]](#footnote-419) For example, the City of Ballarat provides low interest loans in the order of $5,000-$10,000 to the owners of heritage properties, and also operates heritage grants schemes (eg the former $200,000 heritage Verandah Incentives Fund). The City of Bendigo also offers loans.

The Victorian Heritage Restoration Fund is administered by the National Trust of Australia (Victoria) and provides restoration grants to local councils for heritage places in private or public ownership. Over the past three years the VHRF has partnered with Melbourne City Council, Yarra City Council, Ballarat City Council and Casey City council to deliver grant programs for places included in the Heritage Overlay. A total of $720,000 has been awarded to over 60 projects contributing over $2.5 million worth of conservation works to heritage projects across Victoria.[[419]](#footnote-420)

### Incentives

Land tax exemption is available for some owners of properties on the VHR. Under s243 of the Heritage Act Council may seek approval on behalf of an owner, to remit or defer payment of land tax attributable to a place on the Victorian Heritage Register. This is not financed through the heritage fund.

There are also some incentives available for people whose properties are on the local Heritage Overlay – two local councils have waived fees for planning permits triggered by the overlay and two offer a rates reduction.

### Other public sector funding

There are other sources of funding for cultural heritage assets and activities in Victoria over and above that provided by Heritage Victoria.

* **Creative Victoria funding for cultural heritage**

The Victorian Government also funds cultural heritage institutions such as Museums Victoria ($33.5 million) through government investment in the creative economy.[[420]](#footnote-421) The most recent budget included funding not only for major cultural heritage institutions such as Museums Victoria but for projects such as the Maldon Vintage Machinery and Museum and funding for various festivals and events.[[421]](#footnote-422) The fund also supports organisations such as Working Heritage Victoria.

* **Railway heritage**

VicTrack supports the preservation of Victoria’s rail and tram heritage through the annual heritage program which allocates $1m each year to the restoration of state heritage-listed buildings and structures. The Community Use of Vacant Rail Buildings program further supports the restoration of old rail assets to return them for use to communities. Vic Track also manages many of Victoria’s important heritage locations including the Hawthorn tram depot and the Newport Workshops.[[422]](#footnote-423)

* **Regional development funding for heritage**

Perhaps the largest single source of grants for cultural heritage is Regional Development Victoria who fund a wide range of arts and cultural heritage projects including both infrastructure and activities.

Support for cultural heritage includes $1 million to the Barwon Paper Mills Arts and Culture Precinct regeneration, and grants under the Stronger Regional Communities Programme to the Seymour Railway Heritage Centre, to Ballarat Council for a heritage toolkit and to Ballarat and District Aboriginal Co-operative Koorie Heritage Trail upgrade.[[423]](#footnote-424)

Funding for the Regional Tourism Investment Fund has also supported the Budj Bim Cultural Landscape Master Plan, the Holgate Group Historic Hotel and Brewery Discovery Centre, the Walhalla Goldfields railway Rail Motor Project and the Winton Wetlands Indigenous trail project.[[424]](#footnote-425)

**Let’s Stay Connected**

The Let’s Stay Connected programme has helped communities stay connected during the Covid 19 virus. As well as a wide range of arts projects, the program has supported heritage initiatives such virtual tours of J Ward, Ararat’s Old Gaol and Lunatic Asylum, and capturing the stories of local residents to create intergenerational relationships, storytelling and a project to connect with Aboriginal elders in the community of Echuca. The project also supported initiatives within Aboriginal communities and the Bakhtar community, and a cultural dance initiative.

* **Veterans’ funding**

The Victorian Government has a strategy for war heritage and history. The Victoria Remembers grant program funds projects to commemorate service or educating Victorians about veterans’ communications, including films, memorials, ANZAC day services and other ceremonies, displays, plaques and exhibitions.[[425]](#footnote-426)

* **Educational funding**

Organisations such as Museums Victoria received funding from the Education department to support outreach and educational programmes.

* **Disaster recovery and resilience**

In the wake of the disastrous 2009 and 2019-20 bushfires, there has also been some support for cultural heritage projects as part of disaster recovery. This includes support for Aboriginal culture and healing and support to preserve cultural heritage in the aftermath.[[426]](#footnote-427)

The Australian Museums and Galleries Association website also provides links to federal grants for heritage and history initiatives, including community heritage grants to assist with the preservation of locally owned but nationally significant collections, support from the National Cultural Heritage Account to support acquisitions, the Saluting their Service Commemorative Grants program run by the Department of Veterans Affairs and the Visions of Australia regional exhibition tourism fund.[[427]](#footnote-428)

### Private sector funding

Public and private sector owners also make a major contribution to the care of cultural heritage assets. This can include philanthropical support for cultural institutions, the expenditure by owners on protected cultural heritage assets or other spending on heritage activities.

As noted above 91% of registered cultural heritage assets are in private ownership and therefore maintained and managed through private investment. These places are not generally eligible for heritage grant funding.

The Australian technology sector notes that, ‘99% of the money earned and spent is raised by owners and members. Grants are minimal and the sector is often excluded from ‘arts’ and ‘cultural’ funding.[[428]](#footnote-429)

# Annex 2: Cultural heritage assets and their condition

***This is the second part of the heritage stocktake for Victoria. It summarises available data on heritage assets and their condition.***

This report uses the term ‘assets’ to refer to both tangible and intangible things that people see as part of their heritage (defined as what they value and want to hand on to the future). Tangible assets include landscapes, underwater heritage, buildings, places, sites objects, collections, technology and more. Intangible cultural heritage includes language, knowledge, skills, traditions, and art form. Indigenous approaches to heritage blur these distinctions.

The 2021 State of the Environment report for Australia includes data on the numbers of protected Indigenous and non-Indigenous heritage places and objects, and information on their condition based on surveys of practitioners (see below). However this excludes museums, archives, and other heritage collections and materials, and intangible cultural heritage.

## Protected heritage assets in Victoria

***This section summarises data on protected heritage assets.***

In brief, heritage may be formally protected through the Aboriginal Cultural Heritage Places Register, the Victorian Heritage Register or on local Heritage Overlays. A summary overview of how the system operates, including the relationship between State and Local heritage, can also be found in Chapter 2 of the recent HCV State of Heritage: Local Heritage report.[[429]](#footnote-430)

### Aboriginal cultural heritage

Aboriginal and Torres Strait Islander people are the Traditional Custodians of the land in Victoria. The state is on a Treaty path designed to embody Aboriginal self-determination in public policy and law. It is an opportunity to recognise the unique status, rights, cultures and histories of First Peoples.[[430]](#footnote-431) The Treaty process places culture and heritage at the centre of ensuring that there is a voice and recognition for Aboriginal and Torres Strait Islander culture and heritage. The importance of protecting cultural heritage in the wider process of Treaty and giving weight to First Nations voices in Australia cannot be underestimated.

As noted above a more comprehensive picture of issues relating to the care and protection of ACH in Victoria can be found in the State of Victoria’s Aboriginal Cultural Heritage Report 2016-21. The Federal State of the Environment Report or 2021 notes that across Australia there are around 23200 known and listed Indigenous sites.

Throughout Victoria, even in the most intensively developed regions, the landscape holds the imprint of thousands of generations of Aboriginal people. The Aboriginal Cultural Heritage Places Register and Information System for Victoria (ACHRIS) is the online tool used to access the Victorian aboriginal heritage register.[[431]](#footnote-432) This is a repository for Traditional Owners to share information about cultural heritage and includes place registrations, Intangible heritage registrations, cultural heritage management plans, permits, archaeological report and other information. The register is not publicly accessible as it contains culturally sensitive information. There are also systems in place in Victoria for reporting Secret or Sacred Objects, and also Ancestral Remains, and returning them to Traditional Owners.

Around 45% of the Australian protected reserve system includes Indigenous Protected Areas, managed, jointly managed, or owned by Indigenous peoples. Rangers are employed to manage the land, and common activities include burning country, managing feral animals, and managing tourist visitation. That Aboriginal cultural heritage also includes contested heritage, including many massacre sites that are in the process of being documented.

### Victorian Heritage Register (VHR)

According to the HCV Annual Report or 2022[[432]](#footnote-433), there are a 3142 registered places, objects and shipwrecks on the Victorian Heritage Register including:

* 2332 registered places including 202 archaeological places and one World Heritage Site,
* 45 registered objects,
* 659 registered shipwrecks,
* 96 objects integral to a registered place, and
* 10 protected zones.

In 2021-2 an additional 10 places were added to the Victorian Heritage Register whilst several amendments were made to existing entries. In Victoria there are also 25 places on the National Heritage List, and 31 places on the Commonwealth Heritage List.

### Heritage Overlays

Heritage Overlays protect places and objects of local significance.

The recent review of local heritage for Victoria provides a comprehensive stocktake of local heritage. It noted that in 2019 there were 21,419 Heritage Overlays in Victoria, protecting more than **186,656** properties. Of these, 2,332 are State Significant places on the VHR (see above) and 19,095 are places of local significance. Within these, 17,992 entries are for individual places and 1,103 are precincts.[[433]](#footnote-434) In the City of Yarra for example, more than 60% of the city’s properties are on the Heritage Overlay.[[434]](#footnote-435)

### The parks estate

The parks estate in Victoria includes many cultural heritage sites. This includes six cultural landscapes of national significance, 210 places of State significance and many other additional places of local significance. It includes almost 30,000 assets with historic heritage values and 55 collections of moveable historic objects of non- Aboriginal cultural significance. The estate includes one national heritage park – the Castlemaine Diggings National Heritage Park - and 94 designated historic reserves.

There are also assets with historic heritage value at other sites. The network includes 2,884 historic assets, the highest number of which are in the Alpine National Park. The parks network includes 140 places across 84 parks and 67 shipwrecks across 26 parks on the Victorian heritage register. 16 parks are within landscapes included on the National Heritage List of which 12 are terrestrial.[[435]](#footnote-436)

Budj Bim National Park in the southwest forms part of the Budj Bim Cultural Landscape, designated on the World Heritage list in 2019.- It is the first heritage site on the list to be recognised solely for its Aboriginal cultural heritage significance.

## Other heritage assets

***This section summarises data on other heritage assets that may not be formally protected.***

There are many more cultural heritage assets that are of importance to people in Victoria (and elsewhere). These include known archaeological find sites, material in archives, libraries and collection from archives to large items such as ships, in personal collections. There are also a wide range of heritage collections, objects and places that are important to people but not on the VHR or Heritage Overlays or held in museums or archives.

### Collections and archives

Cultural heritage also includes objects, collections, and archives. Sometimes those are held in cultural institutions such as museums, archives and libraries, or associated with protected heritage sites.

The AIATSIS Art and Object collection reflects the diversity of Aboriginal and Torres Straits Islander cultural expression and contains around 6,000 items.[[436]](#footnote-437)

According to Museums Australia, there were 49.6 million museum objects at the end of June 2008, including Aboriginal collections and historic objects.[[437]](#footnote-438)

Within Victorian parks there are 14,477 moveable objects from 55 collections sites, and around 3,000 that have not been catalogued.[[438]](#footnote-439)

The Victorian Collections website showcases collections from around Victoria. Around 500 organisations in Victoria use the website to manage their collections and contribute to a growing database of items. Those organisations include Aboriginal Trusts, historical societies, private owners, and local museums. Nearly 200,000 items across the state are included on the website. The table of organisations includes a directory of over 1,000 Victorian collecting organisations, which can be searched by region, type or name.[[439]](#footnote-440)

There are around 8.1 million items created by 9,000 bodies in the National Archives. The Victorian archives centres provides access to both Commonwealth and state records.[[440]](#footnote-441) The Public Record Office Victoria (PROV) is the archive of State and Local government in Victoria and holds over 100km of digital and physical records from 1836 to today.[[441]](#footnote-442)

### Movable heritage (including technology)

The technology heritage sector covers machines – items which perform a specific function, usually requiring an external energy source, and the sector focuses on movable heritage and the intangible heritage associated with it (including knowledge and skills). The main areas are rail, maritime/riverine, aviation, motor vehicles, horse drawn vehicles, portable and stationary machinery (from steam and internal combustion engines to household appliances). The sector overlaps with industrial heritage and archaeology which includes transport infrastructure, the remains of former industries and other historic public infrastructure such as water.

Technological heritage can be held in museums (often as static objects), but there is also a significant group of people involved in the operating heritage sector, of which the largest sub-sector is motor vehicles. As noted it is estimated that around 400,000 people are involved in around 4,500 clubs, which provides some indication of the potential number of items of interest.[[442]](#footnote-443)

The register of historic vessels hosted by the Australian National Maritime museums identifies around 800 historic vessels of which many have an association with Victoria (the register lists 195 vessels associated with ‘Victoria’ (including the name of the vessel)[[443]](#footnote-444) and there are over 600 preserved steam locomotives – managed by a range of organisations, including Steamrail Victoria and the Newport Railway Museum, both in Newport.[[444]](#footnote-445)

### Victorian Heritage Database

The Victorian Heritage database is a portal providing access to the Victorian Heritage Register and the Victorian Heritage Inventory. It also includes Heritage Overlay information for a number (but not all) Local Government Authorities and the non-statutory listings held by the National Trust of Australia (Victoria) and the Victorian War heritage Inventory.[[445]](#footnote-446)

The Victorian Heritage inventory lists known historical archaeological sites and contains more than 7,000 sites. Approximately 65,000 artifacts have also been preserved and made available to researchers in the State’s archaeological collection.

The Victorian National Trust Heritage Register is a comprehensive heritage register for Victoria covering all types of cultural and natural heritage including buildings, trees, landscapes, gardens, public art and pipe organs. Entry on the register has no statutory status but can be a trigger to raise awareness.

### The National Trust Register of Significant Trees

Over 30 years National Trusts across Australia have compiled records of around 2,500 significant trees. Information about registered trees for Victoria is available on an iphone app.[[446]](#footnote-447)

### Intangible cultural heritage

The Australian Register of the UNESCO Memory of the World Collection lists and celebrates documentary heritage and archives including Indigenous documentary collections, business records, archives.

It includes the AIATSIS AustLang database, which provides information on around 300 Aboriginal and Torres Straits Islander languages.[[447]](#footnote-448) The Indigenous section includes the Australian Indigenous Languages Collection at IAITSIS, and other collections including the Sorry Books, the Mabo Collection and other historic anthropological collections.

Other sections include collections that document intangible heritage, including visual arts, performance, folklore and more.[[448]](#footnote-449)

### Digital heritage assets

Digital heritage is being created at an unprecedented rate and its preservation is problematic. The UNESCO Memory of the World has highlighted this as a priority and the National Library of Australia is using Pandora to capture these resources.[[449]](#footnote-450)

## Holistic approaches

***This section notes some of the more extensive place-based cultural heritage mapping that go beyond individual objects or sites.***

### Everyday heritage

There are many more places, buildings sites and landscapes that are important to people in Victoria than are recognised in the Heritage Overlays or on the VHR. There are many reasons for this, such as:

* lack of knowledge or research,
* things that have value for reasons that are not reflected in heritage legislation such as embodied energy in older buildings,
* places, sites and collections that are important for personal or collective reasons that do not meet thresholds for protection in heritage legislation, and
* financial, political and attitudinal barriers to progressing cultural heritage initiatives.

For example, the feasibility paper for a new Victorian Heritage Strategy identified local heritage as one of the main shortcomings of the previous strategy. Almost all councils in Victoria have completed heritage studies to assess places of local significance, including place types such as post-war heritage. However more than 10% of councils are yet to translate those studies into the Heritage Overlay and 20% recognise that there are geographic gaps in their studies (HCV 2020:2). Those studies also included gaps such as trees and gardens, historic landscapes and post-war residential sites (HCV 2020:19). There were also significant barriers to translating heritage studies into heritage overlays of which the largest was opposition from property owners. Other barriers included expense, lack of political will and issues around authorisation (HCV 2020:25).

Also, much of what is important to people is in the form of intangible cultural heritage such as language, memory and people, that might not be reflected by particular sites or places.

This is clearly illustrated through the HCV 2011 **Migrant Heritage Project**. This collaboration with the former Migrant Heritage Centre in NSW and the Immigration Museum set out to explore migration in Victoria from the 1940s to the present, to uncover the places, objects and collections associated with people who participated in this period of major change. The project worked with the City of Darebin and migrant communities to identify places that mattered to them. The focus was on migration as lived experience rather than migration as heritage (HCV 2011).

### Cultural landscapes and character-based approaches

The challenge of giving greater weight to the character and values of ‘place’ in its widest sense within the planning system is not new. The VHR and Heritage Overlays designate particular sites, objects or precincts that meet thresholds for local and state significance but as noted, places often have value to people in a way that does not meet those thresholds.

Other jurisdictions make greater use of extensive area or landscape scale character-based approaches, which don’t rely on thresholds of significance, such as the more extensive use of conservation areas in the UK, historic districts in the USA, landscape character or historic urban characterisation methods.

As well as the Migrant Heritage project mentioned above, Victoria has been pioneering examples of more place-based approaches. For example, recently the, the **Pyrenees Futures** project took a place-based approach to the strategic planning of towns, working with the community to understand what makes each town its own special place, and then creating framework plans to ensure future development complements and enhances the feel of the towns (HCV 2020:20).

Cultural landscapes are central to many environmental initiatives. For example, in Victoria, the State of the Marine and Coastal Environment Plan for 2021 acknowledges the importance of cultural landscapes as the ‘product of generations of economic activity, material culture and settlement patterns’. The Draft Coastal Strategy incorporates Indigenous language, knowledge and leadership into the system of cultural landscape health and management reporting.[[450]](#footnote-451)

There are also a range of initiatives around cultural mapping, designed to capture the multiple different stories and values embedded in places, working collaboratively with communities on the ground. Whilst this happens most often in and around Aboriginal cultural heritage, such as the work undertaken by Extent at Hanging Rock, the approach is of relevance to anywhere.

Local Government has also been involved in exploring other ways of identifying and managing heritage. For example, the City of Ballarat has embraced the Historic Urban Landscapes (HUL) approach which:

* starts by asking the community what is important to them,
* accepts that things are valuable because the community values them,
* focuses on change - asking questions like 'What change is coming and how will it impact on the things we love about our city?', and
* shifts the focus from preservation to one of conservation, requiring creative and innovative solutions to enable sustainable and equitable change in a historic city.[[451]](#footnote-452)

## Heritage at risk

***This section summarises data on the condition and threats to cultural heritage assets in Victoria.***

It is also important to understand the condition of and threats to cultural heritage assets. This is because there is evidence that the condition of cultural heritage assets affects our perceptions of the value of those assets.[[452]](#footnote-453)

At an international level, UNESCO requires regular reporting on the condition of cultural world heritage sites, and countries such as England also have a regular system of reporting on heritage at risk. For Australia, the quinquennial Australian State of the Environment survey reports on pressures on cultural heritage, based on the surveys of cultural heritage experts rather than systematic field-based surveys.[[453]](#footnote-454) For Victoria, some evidence for the condition of cultural heritage comes from the State of Aboriginal Cultural Heritage 2016-21 Report (noted above) and some previous studies of the condition of heritage assets commissioned by Heritage Victoria.

The national State of the Environment 2021 report notes that the outlook for Indigenous, historic heritage and geo-heritage in Australia is poor. One of the most significant losses has been the destruction of the Juukan Gorge Caves – highly significant Indigenous art sites. The main pressures on cultural heritage were identified as resource extraction, development, poorly managed tourism, inadequate management and protection, natural weathering and erosion, climate change and bushfires. Urban and peri-urban development continue to put pressure on cultural heritage. For Indigenous heritage those pressures also include a lack of control by Indigenous Australians over the management of Indigenous heritage sites, and issues such as the effects of colonisation, disempowerment and disconnection from country.

Empirical evidence for the condition of heritage in Victoria comes from two State of the Historic Environment initiatives. The 2008 Victorian State of the Historic Environment initiative was undertaken as part of the Victoria’s Heritage *Strengthening our Communities Strategy* in 2006. The author visited and photographed every site on the Victorian (historic) heritage register to report on condition. Of the 2,071 places and objects on the VHR were assessed and 450 were identified as being in poor or very poor condition (Marshall 2010).

A second audit was conducted in 2015 (Context 2015). Of the 450 places identified as being in poor condition in 2006, 155 were assessed again. Whilst some places had benefited from grant programs, many had not. Perhaps the critical cause of much damage was water ingress which could be prevented by cyclic maintenance. The project included cost estimates for priority conservation works. A total of $30m was based on the upper amount for each option. Structural integrity was a key issue (see chapter 4).

Another measure of the condition of heritage in Victoria comes from State of the Parks reporting. This uses systematic parks-based assessments and targeted quantitative monitoring for a subset of parks to understand the condition, issues and management effectiveness of Victoria’s parks.[[454]](#footnote-455)

The fourth edition reports on the management of historic heritage and Aboriginal cultural heritage. It notes the top ten threats to historic heritage values across the parks estate of which damage to cultural values by visitors, illegal activities and inadequate maintenance are the main threats. Wildfire and extreme weather were also significant.[[455]](#footnote-456) It also notes that generally the condition of historic heritage places and objects was good or very good in about a third of parks, but significantly more parks reported declines (19%) than improvements (9%) since 2013.In the 55 assessed parks, objects were in very good or good condition in 45% of parks but had declined significantly in 29%. Only 30% of parks were fully or substantially meeting objectives for the management of historic heritage places and objects.[[456]](#footnote-457)

Other measures of the extent to which protected heritage sites are at risk or under pressure data can be inferred from development applications and permits. For example, Hunt (2020) has documented the rate of loss of Aboriginal cultural heritage sites in NSW. Between 100 and 200 sites and objects are lawfully destroyed each year with around 5 permits each week being issued for the disturbance or destruction of Aboriginal cultural heritage. Between 2012 and 2017 704 permits were issued.[[457]](#footnote-458)

The National Trust of Victoria has documented 100 lost buildings of Melbourne in their Lost! App.

In 2020 the Parliament of Victoria launched an inquiry into protections within the Victorian Planning Framework, which included questions relating to the protection of heritage including its adequacy.[[458]](#footnote-459) Key bodies made submissions highlighting specific issues around cultural heritage at risk. Chapter 5 of the Interim Report identifies key issues relating to cultural heritage in Victoria to be pursued further at a future inquiry.[[459]](#footnote-460)

# Annex 3: Public attitudes to heritage

***This annex notes some findings from previous research on Victorian (and Australian) public interest in, and attitudes to, cultural heritage.***

Several previous studies have gathered data on public attitudes to cultural heritage in Victoria and in Australia. These include studies looking at public perceptions of heritage priorities, and audience research into heritage visitor motivations and barriers. The research includes surveys of the public, visitors, residents and stakeholders (such as historical societies or owners of heritage properties).

This research is not included in the main report as it is not primarily about the social, economic or environment ***impact*** of heritage activities or interventions. However, understanding attitudes to heritage can help inform policy on conserving heritage, on making the wider case for intervention. Understanding visitor perceptions and motivations also helps shape engagement strategies for heritage places that are open to the public.

It is also possible to use econometric methods to study the willingness of the public to pay for different levels of heritage protection or intervention.

## Public views on heritage priorities

***This section lists some of the main studies for Victoria and other Australian states.***

Primary research public perceptions of heritage priorities has been gathered through surveys, in-depth interviews, and focus groups. This includes the use of more systematic economic research techniques such as ‘willingness to pay’ studies and ‘choice modelling’ studies.

For Victoria there are four recent studies:

1. The 2020 review of **local heritage** included data on council and community perceptions of the local heritage system.[[460]](#footnote-461) As part of this, the Royal Historical Society of Victoria engaged AICOMOS, local heritage advisors and local historical societies to understand their views of the local heritage protections. They surveyed 319 member societies which operate in Victoria with 113 responses.[[461]](#footnote-462)
2. In 2017 Surveyengine/SGS consulting undertook two systematic choice modelling studies on Victorian attitudes to heritage. The first replicated the 2005 AGC survey (see below) using a sample designed to be consistent with Victorian census data with 556 responses out of a sample of 1,060.[[462]](#footnote-463) The second sought to understand more about attitudes to types of heritage and include variables such as proximity and condition. That study involved 1,611 completed responses; age and gender were managed to ensure the final sample was close to the 2016 Victorian census figures.[[463]](#footnote-464)



Figure 30 The Value of Heritage report by SGS Economics & Planning

1. In 2014 the Heritage Council of Victoria commissioned a review of the literature on **community attitudes to heritage,** which included a review of existing surveys and detailed survey results from three studies – work by Deakin University in 2010 (Appendix B), the ACG work from 2005 (Appendix C) , a survey for Mornington Peninsula Shire Council of 150 owners of properties on the heritage overlay and a 2006 City of Ballarat survey of 140 Ballarat visitors and residents on the value of heritage.[[464]](#footnote-465)
2. Sinclair Knight Merz also undertook a community contingent valuation study as part of their work on the City of Ballarat involving 142 survey responses (SKM 2007).

The key studies for Australia include:

1. In 2022 Australia ICOMOS and the National Trust of Australia (Victoria) sought views on heritage protection from the community and from professional heritage practitioners. 250 people responded to the survey of whom 122 were National Trust members, 29 heritage professionals, 29 allied professionals and the remainder individuals and community groups with strong views on heritage.[[465]](#footnote-466)
2. In 2016 the NSW Office of Environment and Heritage commissioned a study of attitudes to heritage from EY Sweeny involving both focus groups and a representative sample of 1000 residents.[[466]](#footnote-467)
3. In 2006 Heath McDonald of Deakin University surveyed 3200 Australians to understand people’s interest in heritage. The 2006 work also included focus groups and in-depth interviews in Melbourne Metro. The work was repeated in 2010 for 2000 Australians.[[467]](#footnote-468)
4. In 2005 HCOANZ commissioned the Allen Consulting Group (ACG) to look at the value Australians attach to historic heritage. Based on a sample of 2000 Australians the study explored people’s willingness to pay, and priorities for, protection. The study used questions derived from a 2003 MORI survey for English Heritage. The survey results were reported at national and state levels with further metropolitan and regional responses. This was the survey approach and methodology that SGS replicated for Victoria in 2018.[[468]](#footnote-469)
5. In 2004 Colmar Brunton sought to measure the public’s interest in Australian heritage, their views on the new National Heritage list and grants program and their interest in Indigenous places, events and stories.[[469]](#footnote-470)
6. Professor David Throsby explored public preferences for heritage conservation strategy through a choice modelling experiment with 282 NSW residents that looked at willingness to pay for the conservation of a range of classes of buildings with different cultural values.[[470]](#footnote-471)

This section identifies some headline findings from these studies.

### Attitudes to heritage

***Australians see heritage as part of their identity…***

The ACG survey of community attitudes to heritage found that 93% of the community saw heritage as forming part of Australia’s identity.[[471]](#footnote-472)

***…however Indigenous Australians feel mainstream heritage ignores and excludes them***

Indigenous Australians connect to their own history and family/community stories but feel that ‘mainstream’ heritage ignores and excludes them.[[472]](#footnote-473)

***Over 80% Australian think it is important to preserve heritage places that they may never visit***

The 2010 Deakin survey showed that over 80% of people thought it is important to ‘preserve heritage places even though I may never visit then’. This compared with 90% of people in the 2005 ACG survey.[[473]](#footnote-474)

***Australians are willing to pay more for additional levels of heritage protection***

In 2005, ACG found that Australians were prepared to pay more for additional levels of heritage protection, and for an increase in the proportion of places in good condition and the proportion of places that were accessible to the public.

Australians’ average willingness-to-pay was estimated as:

* $5.53 per person (i.e., $30.7 million for the whole of Victoria) per year for every 1,000 additional places protected from loss;
* $1.35 per person (i.e., $7.5 million for the whole of Victoria) per year for a 1 per cent increase in the proportion of places in good condition; and
* $3.60 per person (i.e., $20.0 million for the whole of Victoria) per year for a 1 per cent increase in the proportion of places that are accessible to the public.[[474]](#footnote-475)

Overall, the study found that, ‘a scenario involving a measured tightening of development controls and an increase in the number of heritage listings yielded a willingness-to-pay in 2005 of $105.90 per person per year.’[[475]](#footnote-476)

That equates to **$587.5 million** for the whole of Victoria.

Assuming that the population of Ballarat had similar characteristics to the general population, SKM suggested that it was not unreasonable to ‘transfer’ those results to suggest that the residents of Ballarat would be willing to pay $6.7 million per annum for an improvement in heritage protection.[[476]](#footnote-477)

***..but community concerns about listing are one of the barriers to finalising heritage overlays***

However, in contrast the SGS study of attitudes to heritage in Victoria found that one of the greatest barriers to finalising heritage studies was community resistance to listing.[[477]](#footnote-478)

***Listed building owners are proud of and enjoy contributing to part of history***

A survey of 1000 listed building owners found that 93% considered their property important to the character of the local area and 67% thought the property important in terms of national history.[[478]](#footnote-479)

***Members of the public are more inclined to prioritise maintaining and repairing existing infrastructure in Britain before spending on new infrastructure***

Ipsos MORI poll 56% respondents supported repair and maintenance compared to new build, more than 3X the 16% trending towards the opposite view.

### Public views on heritage priorities

The Australian public are less concerned about aesthetic aspects of historic buildings and more interested in conserving buildings of social or architectural importance.

***People value civic and public buildings more than private assets such as residential or commercial buildings***

SGS found that people were more willing to pay more to civic or public buildings such as lighthouses, train stations and court houses than ‘private domain’ assets such as residential or commercial buildings. Military sites and ANZAC memorabilia returned relatively high willingness to pay values.[[479]](#footnote-480)

***Australians are more interested in social and architectural aspects of buildings than* aesthetic values**

Throsby et al undertook a choice modelling exercise to understand both how much people were willing to pay to conserve historic buildings and the cultural values that they prioritised. WTP study that looks at both a class of buildings and seeks to explore aspects of cultural value.[[480]](#footnote-481)

***Victorians are more willing to pay for conserving older buildings than newer ones***

SGS (2018) found that Victorians were willing to pay nearly twice as much to conserve a 19th century building than one built since 1971.[[481]](#footnote-482)

***Different social groups have different priorities for heritage***

SGS noted that male respondents preferred objects of local significance, and that older respondents were more interested in older sites and less interested in industrial sites, halls, schools, etc. Wealthier respondents put a higher value on residential buildings and lower value on bridges; university educated respondents put more value on local significance and modern buildings, and less value on ANZAC memorabilia whilst people from metropolitan Melbourne put more value on noise and traffic controls and archiving objects.[[482]](#footnote-483)

***Income does not affect perceptions of cultural value***

Professor Throsby concluded that income does not seem to play a significant role in the likelihood of support for heritage conservation efforts. They also could not find any support for the hypothesis that high income earners are likely to allocate a larger proportion of their income towards heritage conservation effort than those on lower incomes (Throsby 2021).

***Decisions around the value of adaptive reuse are not made consistently***

Bullen and Love (2021) interviewed around 81 building owners and practitioners including developers, cost consultants and others in Perth to better understand how decisions about adaptive reuse were made, and which factors most influenced those decisions. They found there were considerable inconsistencies but that cost and commercial issues, defined in terms of rental return were paramount. Sustainability and energy efficiency criteria were less important.[[483]](#footnote-484)

### Expectations of government

The Australian Productivity Commission noted that,

There is an expectation that governments will be transparent and accountable in their dealings with historic heritage assets, with communities seeking greater clarity as to which agencies are responsible, better information on expenditure and achievements, and increased accountability.[[484]](#footnote-485)

This is reflected in local statements. For example, the 2004 Ballarat Planning Scheme Amendment (C58) noted the growth in community expectations about heritage protection and planning.

Parks Victoria has been tracking community satisfaction with park management since 1997. Between 2014 and 2018 community satisfaction with park management significantly increased from 82% to 90%. However, community satisfaction with the management of metropolitan parks declined slightly in 2014 and remains at about 85%.[[485]](#footnote-486) Community satisfaction with the management of bays, waterways and piers has risen to around 80%.[[486]](#footnote-487)

***People feel that not enough is being done to protect heritage in Victoria***

In 2017 SGS found that almost half of the respondents (48%) felt not enough was being done whilst 19% felt enough was done. A third (33%) did not know (SGS 2018: 29).This is a fall on the Allen consulting national study that showed that 62% felt that too little was being done to protect heritage across Australia and that 32% felt that the level of protection was ‘about right’ (Allen Consulting 2005)

***65% of Victorians believe that too little is being done to protect historic heritage across Australia and only 10% agreed with the statement that we protect too much heritage***

(Allen Consulting 2005)

***People in Ballarat are more satisfied with the level of heritage protection than in other parts of Australia***

SKM found that 45% of Ballarat respondents were satisfied with the level of heritage protection compared to 27% in regional Victoria and 32% in Australia.

***People place a higher value on heritage sites in good condition***

SGS found that across sites, landscapes and historic sites, the condition of a site affected people’s willingness to pay to conserve it.

***People are willing to pay more to conserve sites near them***

SGS found that people were willing pay more to conserve heritage near them, although this was less pronounced for historic heritage

***Public access matters to people***

Victorians were willing to pay more to conserve sites that were publicly accessible.

***Half of people in Victoria (51%) don’t understand (or have no views on) the strengths and weaknesses of the heritage protection system***

SGS also asked people about their knowledge of the heritage protection system and their views on what improvements might be needed. For the survey respondents who did have views on the system, 8% felt it worked well and 7% felt that enforcement was ineffective (SGS 2018:24). 47% did not know what more government could do to protect heritage (p 26) and 54% did not know if the system allowed for community engagement (p 27).

***Almost half of the people surveyed felt that funding should be available for both state and locally listed assets.***

SGS asked about attitudes to funding and found that this was important for both state and locally listed assets. However, views on whether private owners should be supported were mixed, with 40% believing that funding should extend to private owners and 35% disagreeing (SGS 2018:28)

***72% Victorians agreed that penalties should be higher for private owners who undertook unlawful construction***

SGS found that ineffectual enforcement was one of the biggest issues in the heritage protection system, and so also asked about penalties and stricter laws (SGS 2018:28)

Trends

***People’s perceptions of heritage have changed since 2005***

SGS set out to replicate the 2005 Australia ACG survey to identify any differences amongst Victorians in 2017. Compared to the 2005 national results, Victorians in 2017 were willing to pay less to conserve heritage which may reflect changes such as the impact of the Global Financial Crisis or indeed other factors. Both surveys found people consistently willing to pay to protect heritage. However, in Victoria 40% felt that not enough was being done to care for heritage compared with 60% of Australians in 2005 (SGS2018:37).

Robert Freestone interviewed around 50 owners of heritage places, heritage advisors and planners in NSW about heritage at a local government level, noting that at least 90% of the NSW listed heritage assets are in private ownership. He argued that the lack of assistance for private owners combined with controls on development resulted in a public good essentially financed by private owners.[[487]](#footnote-488)

## The perception that heritage listing stops change

***This section addresses the perception that heritage freezes sites by noting that heritage is one of many different considerations in the planning system that controls development. It highlights evidence for public concerns about the process.***

There are frequent press stories about the ‘negative’ impact of protecting heritage assets on property prices. At the time of writing the Age highlighted the withdrawal of the Maribyrnong Heritage Overlay proposals purportedly on economic grounds. Such concerns are often based on assumptions about potential impacts and costs rather than empirical studies.

It is often assumed that a heritage protection prevents future development by freezing a site or building. This is not the case: heritage is one of many considerations in the planning system, including social, economic and environmental issues. The planning system is a two-stage process, where the first stage involves identifying relevant considerations, and the second stage (the permit stage) is where those competing issues are balanced out. It is also true to say that some changes can have positive heritage impacts, so conservation works, for example, may help to offset any detrimental impact from other works – for example and extension.

This is why in Victoria, as in other jurisdictions, economic issues are not a consideration when registering a heritage asset – at either a State or a local level. However, economic issues are relevant at the planning permit stage when heritage considerations are balanced against that (and many other) planning objectives. In Victoria, when preparing an amendment to a planning (such as a heritage overlay), a planning authority must take into account significant environmental, social and economic effects. At the permit stage, responsible authorities are required to consider significant environmental, social and economic effects before deciding on a permit application. [[488]](#footnote-489)

The local heritage review noted that the concerns of owners was one of the main barriers in implementing Heritage Overlays (HCV 2020).

An analysis of Victorian Panel reports provides further evidence for how people understand the relationship between economic and heritage issues in planning. In at least 10 cases before the Victorian Planning Panel, owners opposed the Heritage Overlay on economic grounds arguing that it would prevent the development of their property or impose additional cost burdens. In several cases, it was pointed out that this is a two-stage process and that imposing the heritage overlay does not prevent future development (Greater Shepparton C103, Maroonda C43). It was also noted that the key issue at the Overlay stage was heritage significance and that wider economic issues could be resolved at the point of a permit application.[[489]](#footnote-490)

In others the panel pointed out that whilst there may be economic implications for individual owners, these must be offset against benefits to the community from retention of places of significance to the community and their ongoing contribution to the character of the area and the community’s understanding of and identification with the past (Greater Geelong C71 2004). In the latter case it was advantageous to be able to refer to specific research on the economic impacts of listing in the local area. There were also references to the difference between individual and public economic benefit, and the public benefit of protection outweighed potential individual impacts.

The evidence from these panel reports suggest that there are several challenges in relation to heritage considerations in planning decisions – the need to better communicate how the heritage system works, the ongoing need for robust data and evidence, and the need for some clarity around how terms like individual, and public benefit are understood.

## Barriers and motivations for visiting heritage

It is important to understand who visits and enjoys cultural heritage, and what their motivations are, as well as understanding the barriers to visiting cultural heritage.

Parks Victoria collates systematic data on the motivations and types of parks visitors, using the Parks Victoria Visitor Satisfaction Monitor. This segments visitors into urban socials, trail users, nature admirers, passive and other users, country vacationers, activity-centrics and access made easy. More than half of all visits to Victoria’s metropolitan and national/State parks are for sporting purposes. But since 2013 more people have visited metropolitan parks for socialising and for children’s play. There has also been an increase in overnight visitors.[[490]](#footnote-491)

Parks Victoria also collate data on the demographic profile of park visitors. For national and State parks, visitors are more likely to be males (54% as opposed to females 46%) and aged 50+ years. Most are full time workers (64%) with a combined annual income of over $110,000 and around 48% are university educated. The profile for metropolitan parks is only slightly different.[[491]](#footnote-492)

The Parks Victoria Community Perception Monitor for 2018 involved telephone and online surveys. The key drivers for visitor needs were solitude and spiritual connection, social interaction with family or friends, rest and relaxation, physical fitness, learning about nature or heritage, enjoying nature and scenery and adventure, risk taking and excitement. Whilst 90% of parks fully or substantially provided solitude and spiritual connection, just over 40% fully or substantially provided opportunities to learn about nature or heritage.[[492]](#footnote-493)

Another key measure is visitor satisfaction. Parks Victoria undertakes regular visitor surveys to measure visitor and community satisfaction, tracking indicators such as adequacy of visitor opportunities, threats to quality visitor experience, community satisfaction with park management and community benefits of parks. 86% of the community rate the adequacy of visitor recreation opportunities as good or very good – a figure that has remained relatively constant over the past two decades.[[493]](#footnote-494) In 2018-19, most park visitors were fully or very satisfied with their park visit, a figure that that has improved since 2013.[[494]](#footnote-495)

To better understand what motivates people to engage in culture and heritage, the UK Government commissioned a systematic literature review to understand drivers for engagement, including both how policy interventions shaped engagement and how background factors influenced engagement. The study built a simulation model to show the stages people go through in deciding to take part in culture or heritage. [[495]](#footnote-496)

They found that older people are more likely to engage in culture but less likely to engage in sport. There is a strong link between childhood experiences of engaging in culture and adult engagement. People with higher incomes and education are more likely to engage with culture. For young people, ethnic status had no effect on attending a heritage site, but older people from Black, Minority and Ethnic (BME) groups were less likely to attend.

Whether people attended events was influenced by their sense of influence on the provision of cultural and sporting opportunities. The most successful policy interventions were likely to be increasing promotional activities and removing barriers to engagement, for example, those with a limiting disability. Increasing the supply of activities or their affordability was seen as having less influence.

Former visitors and new visitors are more likely to be young, more likely to report a disability, more likely to come from urban areas and less likely to be white (DCMS 2016).

The top three barriers to visiting places of historic interest cited by non-visitors are lack of time (36.6%), lack of interest (36%) and a health problem or disability (17%) (Historic England 2020a). A significant gap exists between the participation rates of people with ethnicities described as White (75.3%) Asian (59.5%) and Black (41.1%) compared with an overall average of 73%.

There is also evidence that shows that investing in more accessible heritage can make a difference to who engages with cultural heritage. Long-term health problems are the third most common barrier to visiting cultural heritage sites. Historic England found that the gap between those vising heritage with a long-term illness or disability and those without has shrunk in the last ten years from 8.4% to only 3.2%. This suggests accessibility is improving.

91% of adults in Britain supported the reuse of industrial buildings such as mills for cultural, residential, commercial retail and manufacturing. 85% said they did not want to see historic mills demolished and replaced (HE 2017b in Historic England 2020a).

# Annex 4: Annotated bibliography of key studies and literature reviews

***This is an annotated bibliography of the main literature reviews and some of the key primary studies used in this report for Victoria, Australia and internationally.***

This annex lists examples of literature reviews of the environmental, economic or social impacts of heritage. They are grouped under Victorian studies, Australian studies and international studies (including two more systematic literature reviews). Studies are grouped in date order starting with the most recent.

This is only a selection of studies – the websites in annex 5 may include others.

## Victorian reports

**2022 Parliament of Victoria, Inquiry into protections within the Victorian planning framework – interim report**

Although not a specific study, this recent report has some relevant information. An interim report of a wider inquiry into issues in the planning system including issues such as housing provision, fairness, and environmental sustainability, which also includes an overview of heritage protection within the planning system and commentary on issues to consider in a future inquiry. This provides useful context for understanding social and economic aspects of cultural heritage in the Victorian planning system, as this is where trade-offs between economic, social, environmental, and cultural values are negotiated. The submissions to the inquiry also provide useful information.

**2020 Heritage Council of Victoria, State of heritage review: local heritage**

A review of local cultural heritage protection and management arrangements across Victoria with a stocktake of Victorian local heritage management arrangements including what is working well and recommendations on future improvements. The research included a council survey of 79 Victorian councils and all four alpine resort management boards (80 responses) and a community survey sent to representatives from the heritage community (123 responses), as well as interviews and workshops.

**2018 The value of heritage: summary report**

SGS Economics & Planning in partnership with Heritage Victoria, led this project for the Heritage Council of Victoria which aimed to use primary and secondary research to demonstrate that Victorian’s value their historic cultural heritage, and that there are significant benefits in ensuring it is well conserved. Appendix B of the report provides a general review of the literature on valuing heritage covering cultural and economic values and appendix C a review of literature on valuing Victoria’s heritage. The work also includes two important primary studies (see below).

The report also provides an aggregate overview of the value of heritage to Victoria.

Overall, they concluded that an estimated value of $1.1bn for Victoria’s heritage stock generates more than $40m in benefits to the community (this relates only to willingness to pay for cultural educational and heritage services and does not include for example support for tourism exports or the wider brand of Melbourne). They contrasted this with Heritage Victoria’s 2017 operating budget of $4.2m including staff costs and the HCV operating budget of $500,000.

**2017 SGS/Surveyengine choice modelling studies for Victoria**

The 2018 summary report includes two choice modelling studies for Victoria. The first replicates the 2005 Allen Consulting Group (ACG) survey (see below) that used choice modelling to elicit wiliness to pay for heritage outcomes. SGS surveyed Victorian residents using the same questions as Allen posed to provide baseline data and identify trends. There were 556 complete responses out of a sample of 1060.The sample was designed to be consistent with the Victorian Census (SGS 2018:31). A second empirical study, also undertaken with Surveyengine involved a new choice modelling survey that sought to understand more about attitudes to particular types of heritage and include variables such as proximity and condition. That study involved 1611 completed responses; age and gender were managed to ensure the final sample was close to the 2016 Victorian census figures (SGS 2018:16).

**2015 Living heritage audit – a condition and maintenance assessment of places included in the Victorian Heritage Register**

As part of the State of the Historic Environment initiative, this study prepared by Context reviewed a sample of places on the VHR deemed to be at risk in an earlier study and drew conclusions relating to the condition of heritage assets in Victoria and the likely costs of remediation.

**2014 The community’s perceptions of heritage: literature review for Heritage Council Victoria**

This review of existing studies on community perceptions of heritage was commissioned by the HCV to inform communication and prioritise projects and expenditure. The review involved an overview of studies and key findings in relation to what heritage means to people, attitudes to preservation and the expected role of government. There were no Victorian studies on public attitudes to heritage, but general findings were available from studies such as the ACG work. The key national studies cited were the ACG study 2005, and three Deakin Surveys (2006 and 2010) whilst the study also identified work for Mornington Peninsula Shire Council in 2013 and the City of Ballarat in 2006. It also noted a range of international surveys.

The study includes a table identifying some of the key research topics that have been addressed for Victoria, Australia, Ireland, England and Scotland. These include topics around the understanding of and interest in heritage, participation in heritage related activities, protection of heritage and funding for heritage. It also identifies different segments. The Appendices summarise the Deakin and ACG studies. Appendix A summarises existing attitudinal studies for Victoria and Australia, and a second table summarises the key research objectives and methodologies for relevant studies.

**2007 Heritage grants review for Heritage Victoria**

A review of the five Victorian heritage grant schemes in operation since 1994. The report includes a literature review on the value of heritage, grant data analysis, informant interviews and recommendations. Appendix A includes a review of valuation methods, including economic methods (SKM 2007).

**2007 Heritage legislation – does it decrease or increase the value of property?**

This study by Warwick Isles, a University of Melbourne student in Advanced Property Analysis, covers many of the same studies as other papers but includes a table of 33 Australian and international studies of which 23 reported a positive impact, 8 a neutral impact and 10 negative (noting that many studies had a mix of results, including positive, negative and neutral impacts).

**2006 The value of heritage to the city of Ballarat – review by Sinclair Knight Merz (SKM)**

In 2006, in the context of hosting the World Conference for the League of Historic Cities, Sinclair Knight Merz (SKM) reviewed evidence for the value of heritage to the City of Ballarat. The research included focus groups, a survey of residents and comparison of valuation data between properties on the heritage overlay and properties in other locations in Ballarat. In a case study, summarising the full report, author David Cotterill noted that listed residential buildings are not unduly affected by heritage protection and many in Ballarat are positively affected. He also notes that the studies on commercial properties have been more equivocal. However, the key differences are that,

‘…where properties are owned for residential purposes only any financial return on investment will be observed as capital appreciation over time. Commercial property owners however are required to gain maximum use of their land and buildings in order to generate not just capital returns but other income streams as well….in these circumstances heritage listing may affect the owner’s ability to gain full economic from the building and land.’ [[496]](#footnote-497)

**2001 Heritage listing and property values in Victoria – report for the Heritage Council of Victoria**

A summary of the contemporary research relating to the impact of listing on property values. The key Australian or Victorian studies cited are:

* J Alan D’Arcy (the Victorian Valuer-General) on the preservation of sites and cost implications (c 1991),
* James Quigley’s paper on incentives for heritage listing and the effects of heritage listing on the value of residential properties (1987, Adelaide),
* a report on the economic effects of heritage listing by Urban Consulting group 1995,
* Kevin Krastins’ 1997 University of Deakin thesis on the implications of heritage listing on property valuations: a case study of residential development in Geelong
* Scott Keck, Herron Todd White 1999 report on heritage controls and property values – a review at local government level.

**2001 The economic value of tourism to three places of cultural significance. Report by Cegielski, M. et al. for the Australian Heritage Commission**

This report is included here as it includes primary research for the town of Maldon. A report on the economic value of cultural heritage tourism and the potential for raising such value by developing a national list of places. The study involved surveys in three mining towns, Maldon in Victoria, Charters Towers in Queensland and Burra in South Australia. The Maldon survey involved 736 respondents. The results were looked at in terms of visitor characteristics and behaviour, heritage issues, visitor expenditure and economic impact and visitor satisfaction.

**Individual studies and annual reports**

Information about the economic, social or environmental impacts of particular heritage sites or places or experiences can also be found in annual reports for individual heritage organisations. These often contain useful data on visitor numbers, expenditure and impacts. Examples for Victoria include: Puffing Billy Annual Report, Victoria Open House Annual Report, Museums Victoria Annual Report, National Trust of Australia (Victoria) Annual Report, Sovereign Hill annual report and the Working Heritage annual report.

## Australian studies and literature reviews

**Professor David Throsby**

The leading cultural economist David Throsby has published important books and papers relating to the economics of culture.

The principles of cultural economics are set out in key texts including Economics and Culture (2001) and a discussion of the Productivity Commission report (Throsby 2007) {Throsby, 2007, #298036} and an introduction to the use of choice modelling of cultural goods.{Throsby, 2003, #164301}. As well as more theoretical overviews he has been involved in some key Australian studies including a study using choice modelling to assess Australian attitudes to the conservation of classes of buildings, involving 282 respondents in NSW (Throsby, Zedick and Arana 2021).[[497]](#footnote-498) {Throsby et al., 2021, #298812}. A recent research report, ‘Assessing the Impacts of Heritage-led Urban Rehabilitation’ in George Town in Malaysia conducted in partnership with a local heritage group, provides a model for projects that could be applied elsewhere.

His work in Victoria includes a study of the Mildura Arts Centre in regional Victoria (Throsby and O’Shea 1982). Using a contingent valuation survey, he showed that the public good benefit generated by the operation of the centre was sufficient to justify the Council’s expenditure in maintaining it, even though the centres actual income was insufficient to cover the cost.

**2018 The economic value of built heritage in the City of Adelaide, SGS Economics & Planning**

This report explores the economic value of post 1936 heritage in Adelaide through three questions – the value the community place on heritage services, whether the grants system has delivered good value for the investment of ratepayer funds and what impact heritage funding has had on jobs and economic activity. It uses choice modelling to capitalise the willingness to pay for heritage services at $330m. It undertakes a cost benefit analysis of the heritage incentives scheme, calculating a benefit cost ration of 1.68:1 in welfare for South Australians between 2006 and 2017 and models the impact of heritage as supporting 3000 jobs.

**2017/8 Carbon trading and State Heritage Places. Report by Jenifer Faddy for South Australian Department of Water and Natural Resources (now Department for Environment and Water)**

This scoping study, undertaken on a DEWNR Sustainability and Adaptive Reuse Fellowship, is one of the few Australian overviews of evidence for the relevance of conserving heritage buildings to carbon emissions. Particularly it looks at the potential to include heritage conservation in Carbon Trading in Australia. Appendix B is a literature review of comparative studies of embodied energy calculations including several Australian studies, whilst appendix Ci is an annotated bibliography of studies relating to building typologies. Appendix E contains a series of case studies for Australia and elsewhere. This report has a helpful introduction to carbon trading and climate chance science, as well as the low carbon economy and the mechanics of carbon trading including financial tools.

**2016 NSW community attitudes to heritage, report by EY Sweeney for Office of Environment and Heritage NSW**

A social research project with EY Sweeney involved qualitative research with focus groups and a robust and representative quantitative study of 1000 people from across NSW. The study findings include community views on definitions of heritage, priorities for heritage, engagement, expectations of government and perceptions of risk.[[498]](#footnote-499)

**2005 review of property studies by Lynne Armitage and Janine Irons**

In a paper to a 2005 Dublin conference in 2005 Armitage and Irons summarised research into the impact of listing on property values, drawing on work undertaken in Queensland including Victorian studies including D’Arcy 1991 and the 1992 Countrywide Valuers study for the Shire of Maldon. There is a useful table summarising those earlier studies (12) and an analysis of the defining variables.

**2011 Only connect – the social, economic and environmental benefits of heritage in Australia, report by Kate Clark for the Australian Heritage Council.**

Essay for the Australian Heritage Council as part of a suite of essays commissioned in the run up to developing the 2015 Heritage Strategy. There are also other useful papers by Chris Johnston, and Heath McDonald and others. This essay provides some examples of the kinds of evidence that is beginning to emerge about the wider benefits of heritage, as a starting point for articulating the role that heritage can play in modern society and making heritage more visible.

**2010 Sustainability and heritage project – residential, RMIT for HCOANZ**

A review of the energy performance of existing buildings which includes case studies of buildings across each State and a study of ten Victorian archetypes in Sydney, Perth and Wellington. The study used Life Cycle analysis and made recommendations on interventions to improve energy efficiency. The study compared life cycle energy, greenhouse gas, water, and other environmental impacts for a range of older buildings. It reviewed a series of retrofit strategies for their influence on improving net lifecycle energy and environmental performance, and explored how conservation and energy efficiency can be better integrated.[[499]](#footnote-500)

**2006 Conservation of Australia’s historic heritage places, Productivity Commission Inquiry Report**

In 2005-6 the Australian Productivity Commission were asked to examine the main pressures on the conservation of historic heritage places and the economic, social and environmental benefits and costs of the conservation of historic heritage places in Australia. As well as the roles of different bodies and the positive and/or negative impacts of regulatory, taxation, and institutional arrangements on the conservation of historic heritage places, and other impediments and incentives that affect outcomes. It also addressed emerging trends that offer potential new approaches and possible policy and programme approaches.

The report was supported by original research studies, including a survey of local government, and hedonic pricing study on the effects of heritage listing on two local government areas. The inquiry was informed by public and sector submissions.[[500]](#footnote-501)

**2005 Valuing the priceless – report by Allen Consulting Group (ACG) for HCOANZ**

A research study commissioned by the Heritage Chairs and Officials of Australia and New Zealand (HCOANZ) in the context of the Australian Productivity Commission inquiry (see above). This report included a literature review of concepts of value in heritage, and previous research measuring the value of heritage in Australia. It also included a choice modelling study of 2024 adult Australians to identify people’s views on social capital and heritage and to quantify the values that people attach to attributes of protection. The survey methodology was subsequently replicated for Victoria (SGS 2018) and for Ballarat (SKM 2007).

**Inquiry submissions**

Inquiry submissions often include data or observations of relevance to understanding the economic and social impact of heritage, perhaps drawn from annual reports. The extensive submissions to the 2006 Productivity Commission inquiry for example include a variety of different perspectives and information. The 2022 Parliament of Victorian heritage inquiry, and the recent NSW heritage inquiry also include useful submissions and the Juukan Gorge inquiry includes important evidence around the Indigenous cultural heritage.

## International literature reviews

As noted, the literature on the economic and social impacts of cultural heritage is growing fast. Annex 5 identifies Australian and international websites that bring together mainly grey literature in and around this the economic, social and environmental value of heritage, whilst this section identifies some recent literature reviews and key studies:

**Heritage Counts**

As noted in Annex 5, the long running Heritage Counts project has been summarising key research for over 20 years. The aim is to provide access to research findings that anyone can use to make the case for heritage. Past years include specialist issues, as well as regional reports. Three recent reports have been particularly useful to us:[[501]](#footnote-502)

**Heritage and society 2020**

The ‘Heritage and society’ volume identifies a wide range of social outcomes for heritage, from holistic issues such as wellbeing to more targeted topics such as heritage and learning, heritage and social capital, place attachment, civic engagement, and many different forms of equity. The volume groups the research into 13 themes across a wide range of social impacts for heritage (Historic England 2020a).

**Heritage and the environment 2020**

The ‘Heritage and the environment’ volume explores the key aspects affecting the relationship between natural and cultural heritage grouping research studies under the six themes of cultural heritage and the environment, natural resources and the historic environment, historic environment and biodiversity, built heritage and the environment, historic environment and sustainability and cultural heritage and future climate (Historic England 2020b). This report sits beside‘Know your home, know your carbon’(Historic England 2020c).

**Heritage and the economy 2019**

The ‘Heritage and the economy’ report examines the economic aspects of heritage conservation and presents evidence on the numerous ways that the historic environment contributions to national economies and to local economies. Section 1 explores heritage and the economies of uniqueness covering business opportunities, the creative industries, place experiences, property price premiums and potential Section 2 explores heritage and the economy through construction, tourism and volunteering. Section 3 looks at skills and section 4 explore total economic values (TEV).

**2019-21 Urban heritage sustainability and social inclusion initiative (US)**

In the United States the urban heritage dustainability and social inclusion initiative is a collaboration between the Columbia University Graduate School of Architecture, Planning and Preservation, the Earth Institute Centre for Sustainable Urban Development and the American Assembly with support from the New York Community trust. The project has published three volumes of papers on relevant issues such as cultural heritage and big data, cultural heritage and sustainability and inclusion (Avrami 2019, 2020, 2021).

**2013 The social and economic value of cultural heritage: literature review, European** **Expert Network on Culture (EENC)**

In 2013 the EU commissioned an overview of evidence for the social and economic impact of cultural heritage in Europe. This bibliography aims to describe and analyse academic literature and research reports addressing the social and economic value of cultural heritage (Dumke & Gnedovsky 2013).[[502]](#footnote-503)

**2005 Economics and historic preservation: a guide and review of the literature, Brookings Institute 2005**

Randall Mason undertook a review of the literature on the value of preservation for the Brookings institute. It included basic cost studies, economic impact studies, regression analyses (travel cost, hedonic and property value studies, contingent valuation and choice modelling studies and case studies. The review is international in scope but also includes more of the American research.[[503]](#footnote-504)

**Meta analyses or systematic literature reviews**

As well as general literature reviews, there is now a sufficient body of research studies into the value of heritage to also begin to collate meta-analyses - more systematic rapid evidence assessments. This identifies two recent meta-analyses:

**2020 Rapid evidence assessment: culture and heritage valuation studies – technical report. Simmetrica Jacobs for DCMS**

As part of the formal culture and heritage capital approach (see Annex 5) the Department for Culture Media and Sport (DCMS) have commissioned a systematic literature review of the valuation studies for cultural and heritage assets. A rapid evidence assessment (REA) is a balanced systematic assessment of existing studies using quality criteria to assess the current state of the literature and to identify weaknesses and gaps. The review covers studies relating to art engagement, built heritage, cultural institutions, digital assets, industrial heritage, historic amenities, protected areas and religious assets. It includes stated preferences studies (contingent valuation, discrete choice) and revealed preferences (travel cost and hedonic pricing), benefit transfer and wellbeing valuation studies. There is also review of previous meta-analyses (Lawton et al 2020).

**2019 Heritage and wellbeing technical report, What Works Centre for Wellbeing**

The What Works Centre for Wellbeing undertook a systematic scoping review of primary research into the impact of heritage interventions on wellbeing. This examined primary (new empirical evidence on historic places and assets that examined community well-being related outcomes, conducted in communities or healthcare settings in high income countries, published in English between 1998 and 2018. From 3634 unique records, 75 publications met the criteria. The studies looked at heritage activities in museum settings, heritage object handling in hospital and healthcare settings, visiting museum, historic houses and other heritage sites, heritage volunteering, social inclusion projects, activities in historic landscapes and parks, community archaeology or heritage research (table 10) And living in heritage environments (table 11). They also reviewed assessments of the wider social and economic impacts of historic places (Pennington et al 2018).

They identified around 180 different wellbeing measures in heritage studies and argued for a shared approach. They also noted that there had been considerable efforts by heritage-related institutions and actors to target interventions towards minority, disadvantaged and vulnerable groups, including homeless people, people from economically disadvantaged backgrounds, black and minority ethnic groups, children and young people, older people, women and people experiencing physical and mental health issues and disabilities, and that the majority of studies targeted these. They note some critical issues including the lack of research around parks and everyday heritage, and some questions around the quality of heritage engagement and the need for comparator studies. Better research might involve better research design.

# Annex 5: Web resources

***This section notes some of the key websites used in this review to source grey literature.***

This review does not claim to be comprehensive. There is far more data and research in this field than we have been able to draw attention to.

To help the reader access further work, this annex lists some of the key websites that host relevant data or studies relating to the social, environmental and economic impact of cultural heritage.

## Australian web resources

**Australian state of the environment reporting**

For Australia, the principal tool for reporting on the funding management, condition and pressures on cultural heritage assets can be found in the quinquennial national Australian State of the Environment reports (2008, 2016, 2021) published by DECCW. These reports include chapters on Indigenous and historic heritage. Where possible the reports try to gather similar data to previous years to enable time series and monitoring. The reports include graphs tracking the number of items in Federal, Commonwealth and State heritage registers, and funding for cultural heritage.[[504]](#footnote-505) The 2021 review has a welcome new emphasis on the issues surrounding Indigenous cultural heritage. However, the focus of is on protected heritage assets and their condition but previous reports have taken a wider view of cultural heritage and have been able to commission more systematic research into, for example, the condition of heritage assets.[[505]](#footnote-506) Cultural heritage is not included State level environmental reporting - instead the focus is on ecologically sustainable development, the natural environment resources (Victoria), or land and air, climate, biodiversity, water and marine (NSW) .[[506]](#footnote-507) This is not unusual - cultural heritage is also excluded from English and US State of the Environment reporting[[507]](#footnote-508) perhaps reflecting the remit of the lead agencies (DoE and EPA).[[508]](#footnote-509)

**Australian Heritage Strategy commissioned essays**

Prior to developing the 2015 heritage strategy, the Commonwealth Government commissioned a series of essays from Indigenous and non-Indigenous heritage thinkers around issues such as what is heritage, the role of different organisations, expectations of government, the social and economic benefits of heritage and heritage tourism.[[509]](#footnote-510)

**ABS data on arts and culture**

ABS collects data that is relevant to cultural heritage including data on participation, employment and expenditure in arts and culture (4172.0), and also data on employment and spending in tourism and construction. The last arts and culture overview was conducted in 2014 and covers economy (funding and employment), population and people (attendance and participation, household expenditure, the internet and education) industry and environment. Data on natural and cultural heritage is included under environment.[[510]](#footnote-511) The ABS conducts an annual cultural funding by government survey[[511]](#footnote-512) and also the General Social Survey that provides data on wellbeing, social experiences and voluntary work, and therefore incorporates data on cultural heritage activities.[[512]](#footnote-513) The Office for the Arts collates reports from ABS data.[[513]](#footnote-514)

ABS data on construction includes information on building activity and repairs and refurbishment that has some relevance to conservation activities.[[514]](#footnote-515) The Tourism Satellite Account also includes relevant data.[[515]](#footnote-516)

**Australian cultural data engine**

This is a multidisciplinary project based at the University of Melbourne that harnesses cultural databases to analyse cultural production, artistic networks and the socio-economic implications of arts and culture databases. This includes data on who is participating in cultural activity, where and how it happens. However the datasets are mainly arts and performance based with the exception of the Newcastle University TLC map which brings together a range of humanities map layers including Japanese prisoner of war camps, dark places, prisons and other sources. [[516]](#footnote-517)

**Centre of excellence for Australian biodiversity and heritage**

In Australia, the ARC funded Centre of Excellence for Australian biodiversity and heritage focuses mainly on the natural environment and the crucial role of Indigenous people in shaping the long history of the continent but has less information on other aspects of cultural heritage.[[517]](#footnote-518)

**Heritage Chairs and Officials of Australia and New Zealand (HCOANZ)**

This group has led on commissioning strategic policy research for cultural heritage in Australia. As well as developing Dharuwa Ngilan, a new policy standard for Indigenous cultural heritage in Australia the group have commissioned some useful cultural heritage policy research studies including the heritage trades and professional training report (2010), the report on Heritage and Sustainability by RMIT however these reports are no longer on their website.

**Pandora**

Pandora includes material that document the cultural, social political life and activities of the Australian community. Partner agencies include State and territory libraries and other cultural heritage agencies. The Pandora web archive often has cultural heritage research and evaluation that may no longer be found on current websites. It also includes useful report from the former Australian Heritage Commission.[[518]](#footnote-519)

**Parks Victoria**

As noted in the stocktake, Parks Victoria are an important heritage body. They undertake systematic research to improve management effectiveness including regular state of the parks reports and surveys of community and visitor attitudes. They also report on outcomes and benefits for visitors and community.[[519]](#footnote-520)

**The Prahran Mechanics Institute**

This is a community run facility specialising in the history of Victoria. Heritage Victoria have provided them with duplicate reports and there may well be further relevant material.[[520]](#footnote-521)

## International resources

**PlaceEconomics (USA)**

The US firm PlaceEconomics, led by Donovan Rypkema, undertakes studies for organisations across the US. The firm undertakes studies, workshops and surveys in cities across the US exploring neighbourhood revitalisation, affordable housing and heritage resilience. They have also undertaken catalytic impact studies, citywide studies, revitalisation studies and reports into issues such as historic trades housing and preservation. These include a range of studies on property values and landmarking. Most of those studies are online.[[521]](#footnote-522) Rypkema has also published a community leaders guide to the economics of historic preservation (Rypkema 1994).

**The Getty Conservation Institute (USA)**

The Getty Conservation Institute (GCI) has a long-standing interest in the value of cultural heritage and have funded several individual projects and events, as well as publishing research reports. The Values of Heritage project ran between 1998 and 2005 and included research into the values and benefits of heritage conservation and economics of heritage as well as case studies.[[522]](#footnote-523) A 2019 publication reviewed emerging approaches to assessing values in heritage practice and policy including economic, social and Indigenous thinking.[[523]](#footnote-524) The centre has worked closely with leading Australian cultural economist David Throsby, most recently on a project looking at the impacts of heritage led urban rehabilitation in Malaysia.[[524]](#footnote-525)

**Department for Culture Media and Sport (UK)**

The UK Department for Culture, Media and Sport (DCMS) is committed to creating a strong evidence based to show how much DCMS sectors are worth economically and socially.[[525]](#footnote-526)

The CASE programme is a joint programme of strategic research undertaken in collaboration with the Arts Council England, English Heritage and Sport England that collects cross cutting evidence. This programme has conducted systematic evidence reviews for cultural heritage research topics, sifting thousands of articles to narrow down the most relevant. In 2010 DCMS published a summary report of evidence for the drivers, impact and value of engaging with culture and sport. Previous DCMS reviews have included an overview of evidence for the contribution of heritage to regeneration (Evans and Law 2004), a general review of research into the value of culture (O’Brien 2010)[[526]](#footnote-527) and a literature review on the contribution of arts and culture to wellbeing.[[527]](#footnote-528)

**DCMS culture and heritage capital portal (UK)**

DCMS (see above) have been pioneering the application of natural capital accounting methods to culture and heritage.[[528]](#footnote-529) The aim of this project is to transform the approach to assessing value for money through robust appraisal and evaluation. DCMS is publishing research, data, guidance and tools to help organisations make a stronger case for investment in culture and heritage assets, consistent with the HM Treasury Greenbook principles on assessing value for money in public expenditure. The DCMS project has involved extensive literature reviews of valuation studies and will involve further work on understanding the wider services provided by cultural heritage assets.

As part of that Simmetrica Jacobs produced a rapid assessment of literature valuing cultural and heritage assets, supported by an Evidence Bank of values from cultural and heritage valuation studies. The evidence bank cites 184 studies using economic valuation methods stated preference, revealed preference, benefit transfer or wellbeing valuation.[[529]](#footnote-530)

**Heritage Fund research studies (UK)**

The UK Heritage Fund is the largest funder of heritage in the UK, supporting all types of heritage from museums, archives and libraries to historic buildings, landscapes and industrial heritage. They also fund intangible heritage projects. The Fund has a long history of research into the impact and benefits of their work. That research covers the value and role of heritage and the outcomes and impacts of past research. Their research and evaluation reports are online, as is open data on grant funding.[[530]](#footnote-531)

**Technical Tuesdays and climate Wednesdays (Historic England in collaboration with the Climate Heritage Network)**

Historic England have provided a series of free webinars on technical conservation topics including technical Tuesdays. There is also a technical newsletter. Climate Wednesdays cover critical issues relating to heritage and climate change. These include topics such as harnessing heritage for climate resilience, and building reuse as climate action.[[531]](#footnote-532)

**Lessons from the ‘Global South’ webinars**

The Historic England website also hosts talks from architectural practitioners from the ‘Global South’ on what can be learned from traditional and vernacular architecture practices in relation to climate change. These were recorded in the run up to COP 27 (the international climate change conference) in association with the Climate Heritage Network, and show what the global north can learn about climate change and heritage from experts in other parts of the world.[[532]](#footnote-533)

**Heritage counts (UK)**

Historic England and the UK-wide Heritage Forum provide a website containing trends, insights and data about the heritage sector. This is part of the heritage counts initiative which has been running since 2002. Three recent reports on heritage and society, heritage and the economy, and heritage and the environment summarise a wide range of British and International research in a format that is easy for non-specialists to use.[[533]](#footnote-534) Some years have had themes – for example Heritage Counts 2018 focussed on heritage in commercial use. The website includes the Colliers international study of commercial uses of listed buildings in the centres of 55 towns and cities in England.[[534]](#footnote-535) Ramidus Consulting also provided a think piece on flexible and agile working and its relevance to historic buildings.[[535]](#footnote-536)

**Royal Society for the Arts heritage index (UK)**

This project collated data from 120 different datasets about heritage activities and assets. It notes that local communities and cultural leaders may express heart-felt enthusiasm for a region’s heritage and identity but not always see the potential that this has in developing an area economically, culturally or socially. The indicators range from protected sites to local food, activities, young people’s involvement and more. The index includes maps for each area.[[536]](#footnote-537) The 2020 report Pride in Place maps the latest findings.[[537]](#footnote-538)

**The centre for cultural value (UK)**

The centre for cultural value at the University of Manchester focuses on building a shared understanding of the difference that arts, culture and heritage can make to people’s lives and society.[[538]](#footnote-539) As part of the website there are a series of useful ‘Essential Reads’ articles by leading thinkers, that introduce some of the most relevant literature. These include an ‘Essential Reads’ article on cultural value and evaluation by Dr Beatriz Garcia,[[539]](#footnote-540) and one on culture and place by Franco Bianchini.[[540]](#footnote-541) The website also includes research digests on core topics such as culture and health, wellbeing and participation.

**AHRC value of culture and value of heritage projects (UK)**

In the UK, the Arts and Humanities Research Council has funded two recent academic initiatives on the value of both culture and heritage; the AHRC cultural value project focussed primarily on the creative industries although did include data on museums (Crossick and Kaszynska)[[541]](#footnote-542) whilst the heritage value project has had a more academic focus on critical aspects of heritage value.

**Social Platform for Holistic Heritage Impact Assessment (European Union)**

The European Union SoPHIA (Social Platform for Holistic Heritage Impact Assessment) project conducted a literature review of the social, cultural, economic and environmental impacts of cultural heritage on society although again this focuses more on policies and approaches rather than collating data.[[542]](#footnote-543)

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